Technical Documentation

# MasterSeal Exteriors Salesforce Solution

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Demo

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# 1 Project Overview

## 1.1 The Client

MasterSeal Exteriors is a small roofing, windows, and door repair company based in New Zealand. They need a proper sales management system, especially to handle their growth over the past few years and help them scale.

## 1.2 The Product

This Salesforce solution was developed with the provided project requirements, business requirements, and process documentation. It should provide all users at MasterSeal Exteriors with a fit for purpose solution. The product should streamline MasterSeal Exteriors' business process and workflows, improve efficiency, and improve customer satisfaction.

While it was possible to build a solution that aligned with project requirements, not all features were possible to build. Assumptions and technical decisions were made to achieve certain requirements.

# 2 Product Overview

## 2.1 High-Level Data Model

The data model in Figure 1 shows major objects for this solution and the relationships between them.

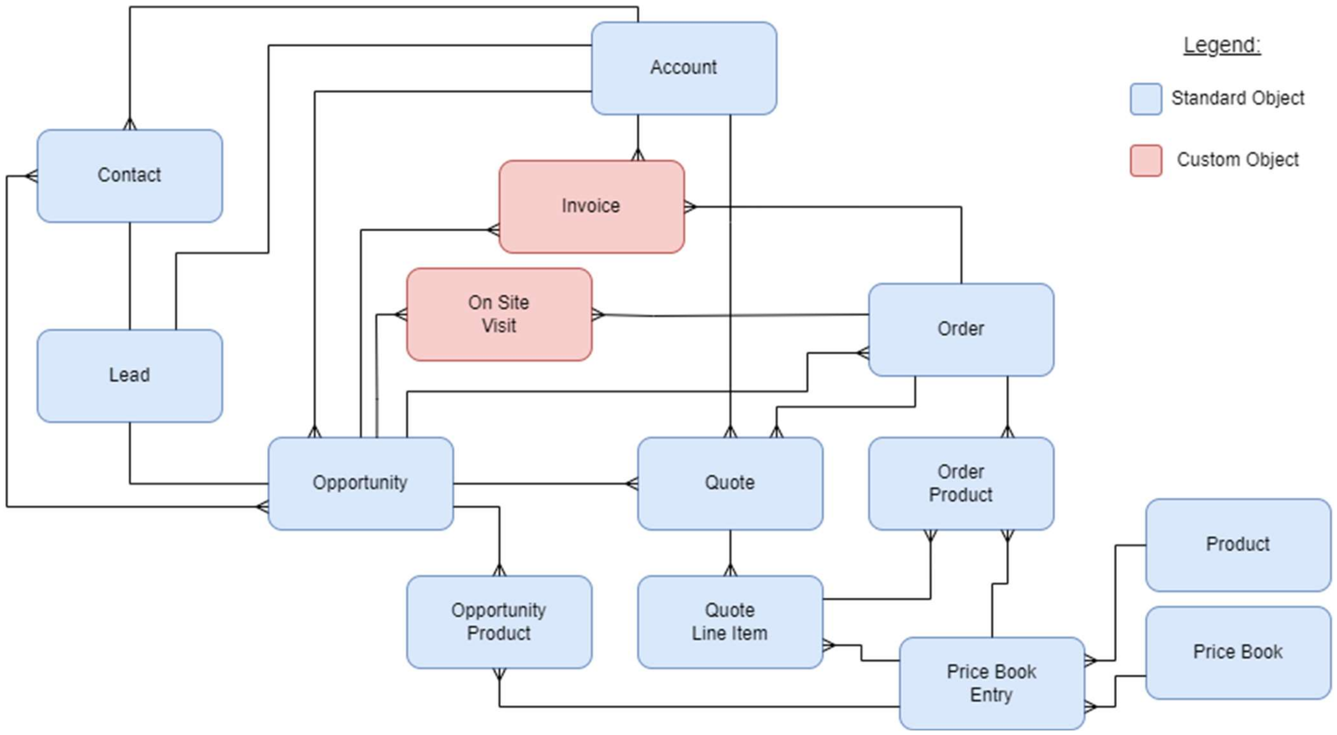



*Figure 1 MasterSeal Exteriors Salesforce Data Model*

# 3 Key Product Features

This section will explain key product features in this Salesforce solution for MasterSeal Exteriors.

Please note that Accounts, Contacts, and Quote Line Items will not be discussed in detail here as they largely remain in their default Salesforce configuration.

## 3.1 Leads

Leads record information and data regarding prospective clients. There are two different types of Leads: residential and commercial.

### 3.1.1 Lead Object Fields

*Table 1 Lead Object Key Fields*

| Key Field | Field Name | Data Type | Picklist Values | Required | Required for Conversion |
|---|---|---|---|---|---|
| Address | Address | Address | | | |
| Company | Company | Text(255) | | Yes | |
| Description of Project/Issue | Description_of_Project_Issue__c | Long Text Area (32000) | | | Yes |
| Email | Email | Email | | | Yes |
| Industry | Industry | Picklist | Salesforce Default | | |
| Lead Currency | CurrencyISOCode | Picklist | NZD, AUD | Yes | |
| Lead Record Type | RecordTypeId | Record Type | Commercial, Residential | Yes | |
| Lead Source | LeadSource | Picklist | Web, Phone inquiry, Referral, Social media, Employee referral, In-person, Other | | |
| Lead Status | Status | Picklist | (Residential): Open – Not Contacted, Discovery, Nurturing, Closed – Not Converted, Converted (Commercial): Open, Background Research, Closed – Not Converted, Converted | Yes | |
| Mobile | MobilePhone | Phone | | | |
| Phone | Phone | Phone | | | Yes |
| Preferred Contact Method | Preferred_Contact_Method__c | Picklist | Email, Phone | | Yes |
| Type of Service Required | Type_of_Service_Required__c | Picklist | Roofing, Windows, Door repair | | |

### 3.1.2 Lead Validation Rules

Converting Leads should only take place when sufficient information has been added. Required fields for conversion are Email, Phone, Description, Preferred Contact Method. A validation rule is created as shown in the image below.

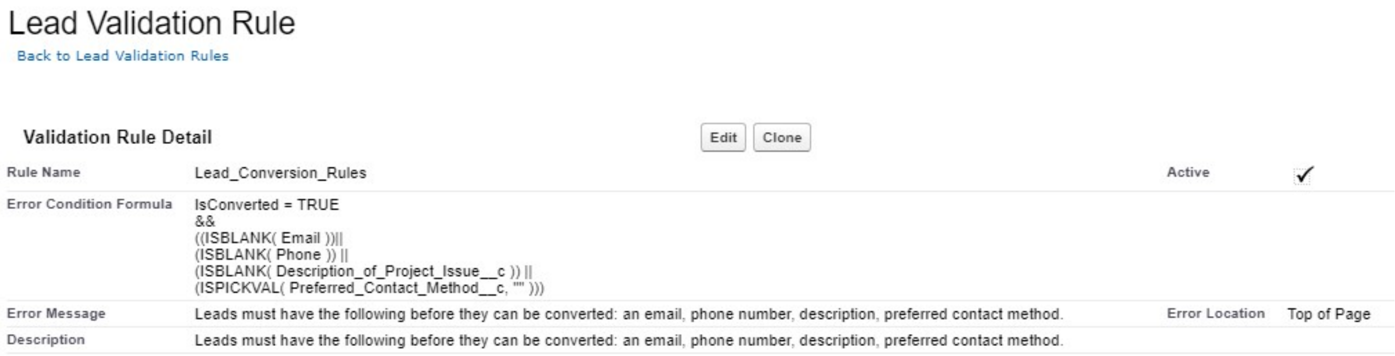



*Figure 2 Lead Conversion Validation Rule*

If the user does not fill out the required fields before converting a Lead, the system will throw an error message on the top of the Convert Lead page as shown in

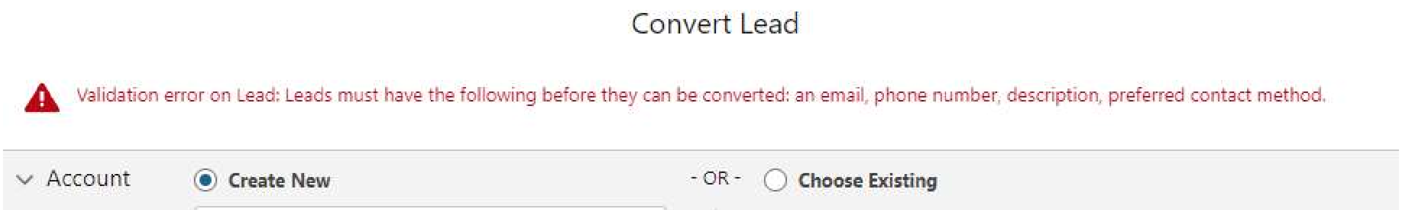



*Figure 3 Lead Conversion Error Message*

## 3.1.3 Lead Conversion

When a Lead is converted, they become a Contact, Opportunity, and a Commercial or Residential Account.

### *3.1.3.1 Lead Conversion Field Mapping*

To ensure that custom field data is retained, custom field mappings have been set.


*Figure 4 Lead to Contact Field Mapping*

For contacts, their preferred contact method is mapped to save the contact's preferences if they wish to do another project with MasterSeal Exteriors in the future.

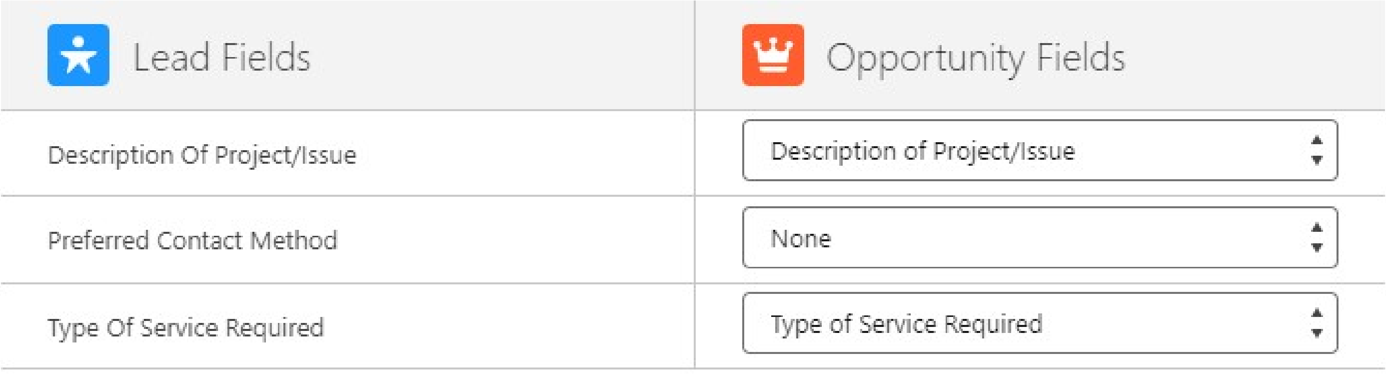



*Figure 5 Lead to Opportunity Field Mapping*

Description Of Project/Issue and Type of Service Required is carried over to the Opportunity created upon conversion to retain information about the project.

Note: these fields are editable in case they change in the future.

#### *3.1.3.2 Lead Conversion Flows*

A Flow, Append Account Name, is triggered upon the creation of an Account, appending either "Residential Account" or "Commercial Account", with respect to their record type to the given name of the account.

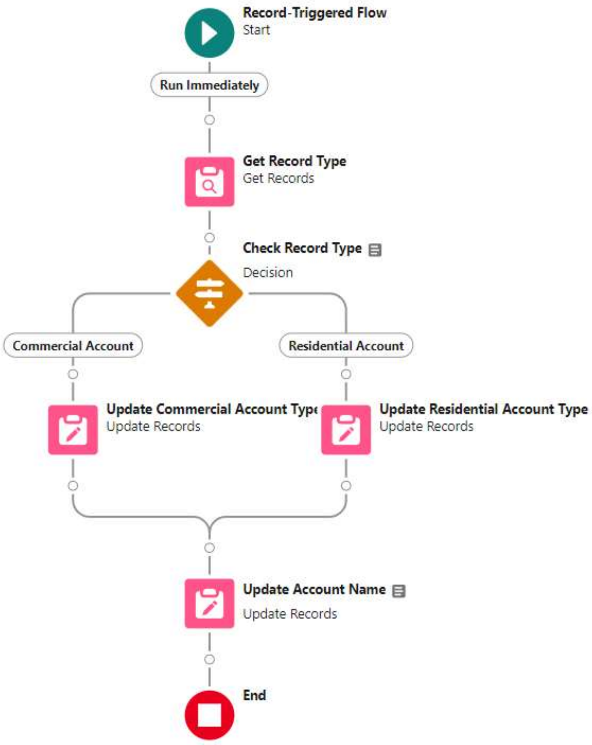



*Figure 6 Append Account Name Flow*

### 3.1.4 Web-to-Lead

Web-to-Lead is a great lead generation tool. This process captures information from potential leads, stores them as Lead objects, assigns them to a queue, and sends an email to staff in the queue.

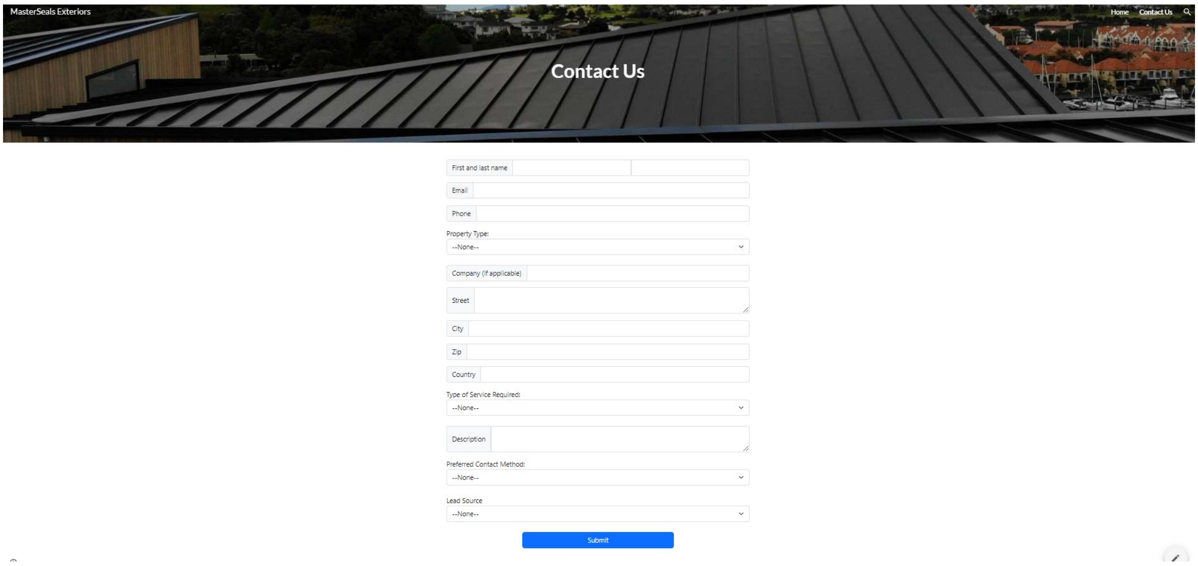



*Figure 7 MasterSeal Exteriors Contact Us Web Page*

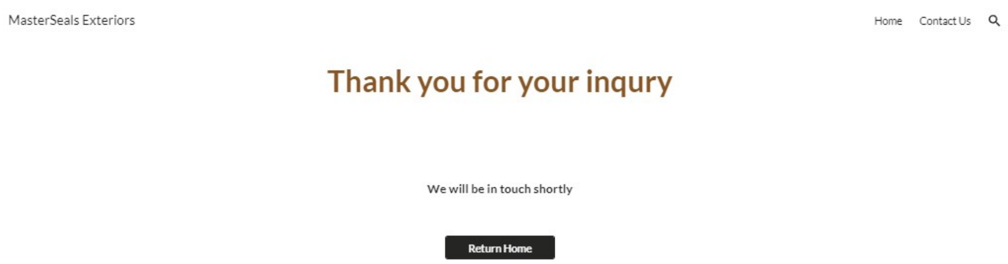



*Figure 8 MasterSeal Exteriors Form Submission Page*

### 3.1.4.1 Lead Assignment Rules

Leads are automatically assigned to either an Australian Lead Queue or New Zealand Lead Queue. The rule will first search the Country field for a matching keyword, then City field for a matching major city.

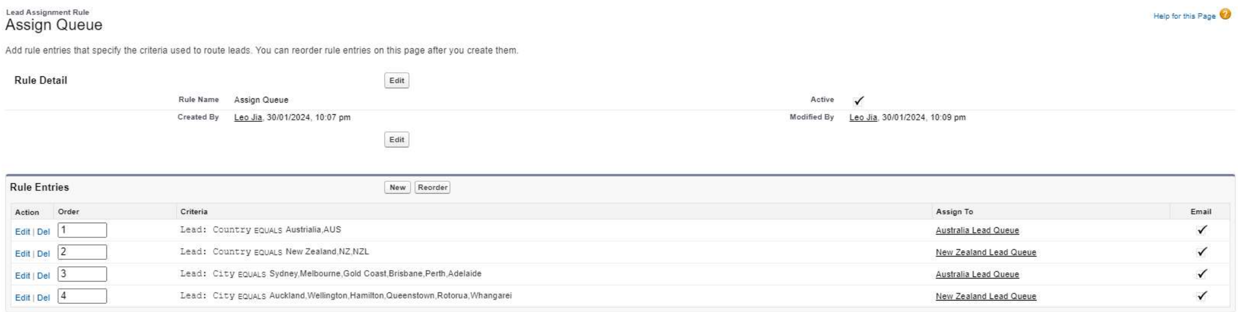



*Figure 9 Lead Assignment Rules*

The rule has been configured so that all users in a queue will receive an email that a new Lead has arrived. The email template is a Lightning Email Template. It is selected in Step 3 of rule entry as seen in Figure 10.

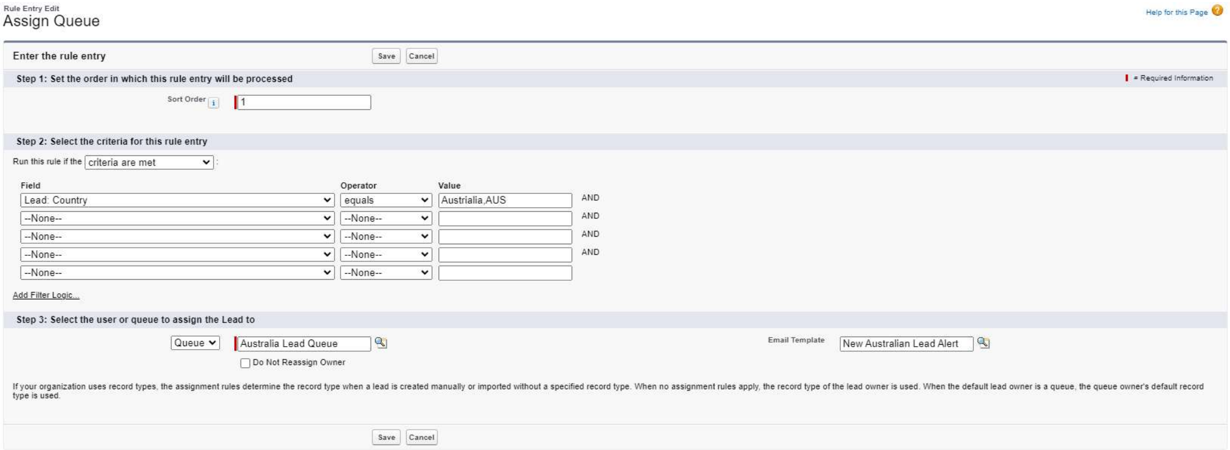



*Figure 10 Lead Assignment Rules First Rule Entry*

Note: As of 23/02/2024, there is an open issue where [Leads created in Web-To-Lead doesn't send email notifications to queue members].

### *3.1.4.2 Web-to-Lead Auto-Response Email*

Upon the submission of a Web-to-Lead form, the lead will receive an automatic email acknowledging their inquiry and letting them know that a team member from MasterSeal Exteriors will get in touch shortly.

Note: the current criteria for the auto-response is that the First Name must not be null to prevent spam, however, the criteria can easily be adjusted as needed. Additionally, the sending email can be easily changed to a company email address.


*Figure 11 Web-to-Lead Auto Response Rule*

The email sent summarizes the inquiry details for the lead so that they can be assured it was received properly.

**Email Template Detail**

| | | | |
|---|---|---|---|
| Email Templates from Salesforce | Unfiled Public Classic Email Templates | | |
| Email Template Name | Web-to-Lead Automated Response | Available For Use | ✓ |
| Template Unique Name | Web_to_Lead_Automated_Response_1706433702105 | Last Used Date | |
| Encoding | Unicode (UTF-8) | Times Used | |
| Author | Leo Jia [Change] | | |
| Description | Automated response thanking the lead for their enquiry | | |
| Created By | Leo Jia, 28/01/2024, 10:21 pm | Modified By | Leo Jia, 15/02/2024, 2:20 pm |

**Email Template**

**Subject** Thank you your enquiry - MasterSeals Exteriors

**HTML Preview**

Hi {{{Recipient.FirstName}}},

Thank you so much for your inqury about our {{{Recipient.Type_of_Service_Required__c}}} services. A member in our team will be in touch with you shortly.

Your inquiry details:

Name: *{{{Recipient.FirstName}}} {{{Recipient.LastName}}}*
Company: *{{{Recipient.Company}}}*
Phone No: *{{{Recipient.Phone}}}*
Address: *{{{Recipient.Address}}}*
Type of Service Required: *{{{Recipient.Type_of_Service_Required__c}}}*
Description: *{{{Recipient.Description}}}*
Preferred Contact Method: *{{{Recipient.Preferred_Contact_Method__c}}}*

We look forward to chatting to you soon!

Kind regards,
**MasterSeals Exteriors**

*Figure 12 Web-to-Lead Auto Response Email Template*

## 3.1.5 Lead Matching and Duplicate Rules

Data quality is important to MasterSeal Exteriors, so there must not be duplicate leads in Salesforce. They are defined as a Lead or Contact with the same email address.

Two custom Duplicate Rules are active in the org, based on two Matching Rules, that prevent Leads from being created if a Matching Rule is triggered.

| | | | | | | |
|---|---|---|---|---|---|---|
| Lead - Contact Email Match Duplicare Rule | Lead email matches an existing contact's email | Lead | Contact Email Matching Rule | ✓ | LJia | 28/01/2024 |
| Lead - Lead Email Match Duplicare Rule | Matching Lead email addresses | Lead | Lead Email Matching Rule | ✓ | LJia | 28/01/2024 |

*Figure 13 Lead Duplicate Rules*

| | | | | | | |
|---|---|---|---|---|---|---|
| Del \| Deactivate | Contact Email Matching Rule | Contact | Active | | 28/01/2024 | LJia |
| Del \| Deactivate | Lead Email Matching Rule | Lead | Active | Matching Lead email address | 28/01/2024 | LJia |

*Figure 14 Lead Matching Rules*

## 3.1.6 Lead List Views

The following custom list views have been implemented:

1. New Zealand Lead Queue
    Filter: Owner equals New Zealand Lead Queue
2. Australia Lead Queue
    Filter: Owner equals Australia Lead Queue
3. Roofing Leads
    Filter: Type of Service Required equals Roofing

4. Door Repair Leads
   Filter: Type of Service Required equals Door Repair
5. Windows Leads
   Filter: Type of Service Required equals Windows

### 3.1.7 Page Layout

Two page layouts have been created: Residential for Residential Leads, and Commercial for Commercial Leads. They share a Lightning Record Page, however there are slight differences in details displayed and status bar.

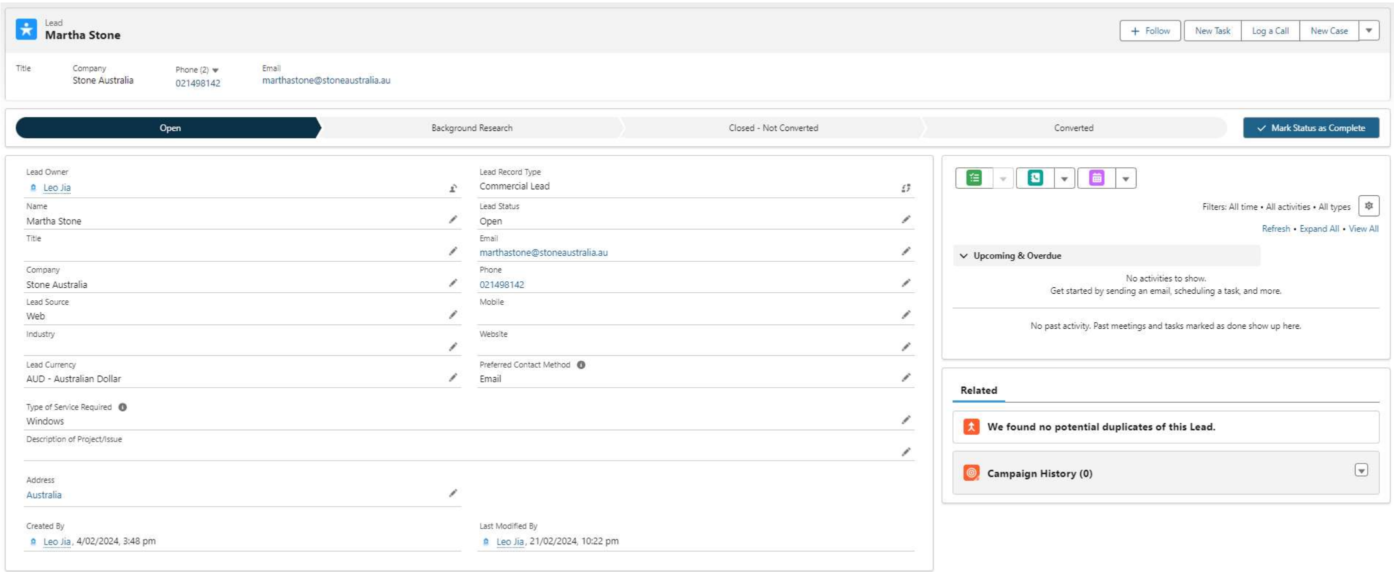



*Figure 15 Residential Lead Record Page*

## 3.2 Opportunities

Opportunities are potential sales or projects for MasterSeal Exteriors.

### 3.2.1 Opportunity Object Fields

*Table 2 Opportunity Object Key Fields*

| Key Field | Field Name | Data Type | Picklist Values | Required | Required to Win |
|---|---|---|---|---|---|
| Account | AccountId | Lookup (Account) | | | |
| Amount | Amount | Currency(16,2) | | | |
| Close Date | CloseDate | Date | | Yes | |
| Description of Project/Issue | Description_of_Project_Issue__c | Long Text Area (32000) | | | |
| Discount Percentage | Discount_Percentage__c | Percent(2,2) | | | |
| Expected Profit | Expected_Profit__c | Formula (Currency) | | | |
| Materials Budget | Materials_Budget__c | Currency(16,2) | | | Yes |
| Opportunity Name | Name | Text(120) | | Yes | |
| Price Book | Pricebook2Id | Lookup(Price Book) | NZ Residential, NZ Commercial, AU Residential, AU Commercial | | |
| Quote Signed | Quote_Signed__c | Checkbox | | | Yes |

| | | | | | |
|---|---|---|---|---|---|
| Stage | StageName | Picklist | Analysis (for on-site visits), Present Quote, Negotiation, Closed Won, Closed Lost | Yes | |
| Type of Service Required | Type_of_Service_Required__c | Picklist | | | |

### *3.2.1.1 Expected Profit*

Expected Profit is a field that is calculated automatically based on Amount (determined by order products), Discount Percentage (determined by order products), and Materials Budget (set by a MasterSeal Exteriors technician).

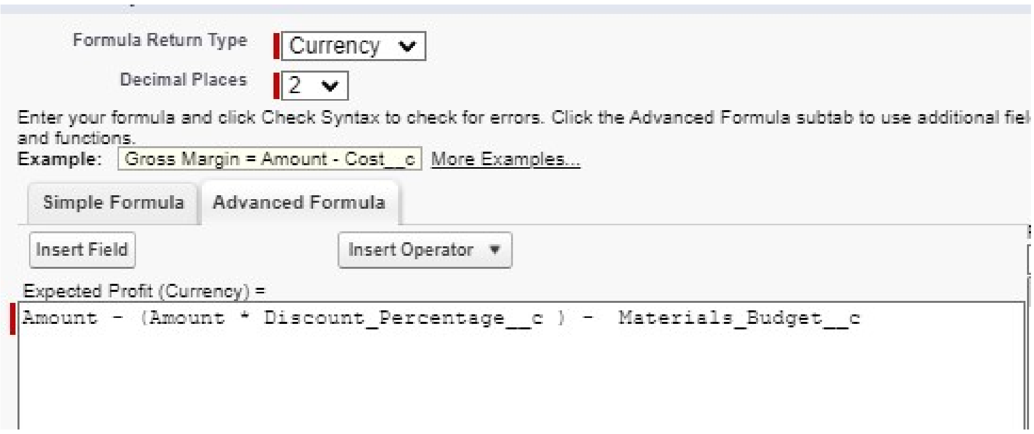



*Figure 16 Expected Profit Field (With Formula)*

## 3.2.2 Opportunity Validation Rules

Opportunities can only be Closed Won when a quote is signed and a materials budget for the project is set. A validation rule has been created to ensure this.

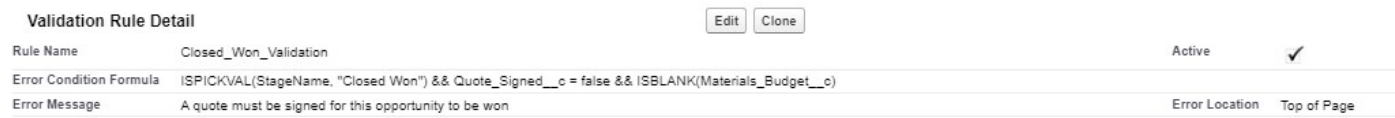



*Figure 17 Opportunity Validation Rule*

## 3.2.3 Opportunity Flows

There are multiple Flows relating to an Opportunity to streamline MasterSeal Exteriors’ sales process.

### 3.2.3.1 New Opportunity Flow

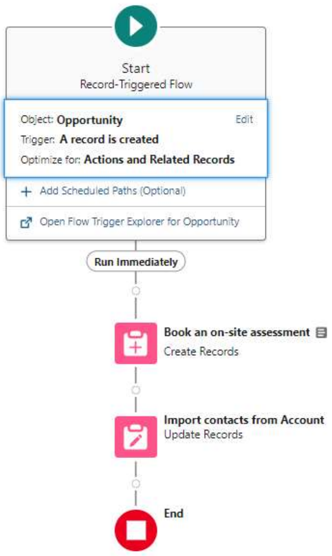



*Figure 18 New Opportunity Flow*

Upon the creation of a new Opportunity, a Flow called New Opportunity is activated creating a task for booking the on-site assessment, as well as importing contact information from the Lead Account.

### 3.2.3.2 Quote Signed Flow

To ensure that a quote has been signed before winning an opportunity, the custom Opportunity field Quote_Signed__c must be checked. This happens when the Signed__c checkbox is checked on an associated Quote, and is automated with the Update Opportunity When Quote Signed Flow.

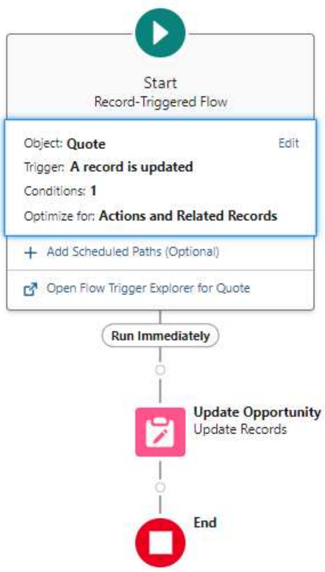



*Figure 19 Quote Signed Flow*

### 3.2.3.3 Opportunity Won Flow

When an Opportunity is set to Closed Won, an Order record is created automatically. The Opportunity Won Flow automates the conversion process.


*Figure 20 Opportunity Won Flow*

The Flow is triggered when the Opportunity Stage changes to Closed Won. Firstly, the Record Owner is emailed and notified about the win. This is accomplished with the help of an Email Alert which uses a Classic Email Template – Opportunity Won.

**Email Alert Detail**

Edit Delete Clone

| | | | |
|---|---|---|---|
| Description | Opportunity Is Closed Won | Email Template | Opportunity Won |
| Unique Name | Opportunity_Is_Closed_Won | Object | Opportunity |
| From Email Address | Current User's email address | | |
| Recipients | Opportunity Owner | | |
| Additional Emails | | | |
| Created By | Leo Jia, 12/02/2024, 10:54 pm | Modified By | Leo Jia, 12/02/2024, 11:07 pm |

Edit Delete Clone

*Figure 21 Opportunity Is Closed Won Email Alert*

Then an Order is created, and its name is set to the name of its parent Opportunity with its Order Number at the end. Next, the Flow loops through all Opportunity Products associated with its parent Opportunity, converting them to Order Products. Finally, the Order Contact is updated.

### 3.2.4 Opportunity Page Layout

One Page Layout and one Lightning Record Page is shared for all Opportunities. It's been carefully designed to display all relevant information on one page.

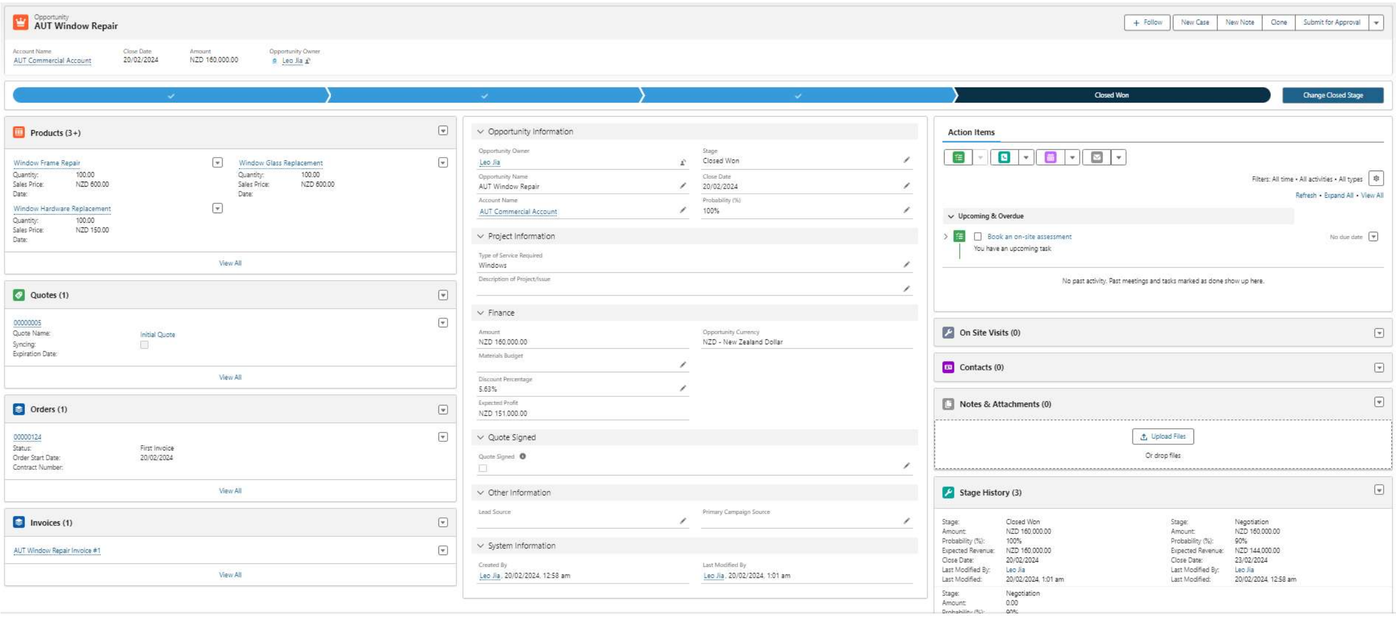



*Figure 22 Opportunity Record Page*

## 3.3 Quotes

Quote records are used to keep track of the different quotes sent to clients.

### 3.3.1 Quote Object Fields

*Table 3 Quote Object Key Fields*

| Key Field | Field Name | Data Type | Picklist Values | Required |
|---|---|---|---|---|
| Account Name | AccountId | Lookup (Account) | | |
| Approval Status | Approval_Status__c | Picklist | Pending, Approved, Not Approved | |
| Bill To | BillingAddress | Address | | |
| Bill To Name | BillingName | Text(255) | | |
| Contact Name | ContactId | Lookup(Contact) | | |
| Description | Description | Long Text Area(32000) | | |
| Discount | Discount | Percent(3,2) | | |
| Email | Email | Email | | |
| Max Item Discount | Max_Item_Discount__c | Roll-Up Summary (MAX Quote Line Item) | | |
| Opportunity Name | Name | Master-Detail (Opportunity) | | |
| Quote Currency | CurrencyIsoCode | Picklist | NZ Residential, NZ Commercial, AU Residential, AU Commercial | |
| Quote Name | QuoteName | Text(255) | | Yes |
| Quote Number | QuoteNumber | Auto Number | | |
| Signed | Signed__c | Checkbox | | |
| Status | Status | Picklist | Draft, Needs Review, In Review, Approved, Rejected, Presented, Accepted, Denied | |
| Subtotal | Subtotal | Roll-Up Summary (SUM Quote Line Item) | | |
| Total Price | TotalPrice | Roll-Up Summary (SUM Quote Line Item) | | |

### 3.3.2 Quote Discount Approval Process

A Discount Approval Process has been created for discounts in Quotes. Max Item Discount is a roll-up summary field that returns the highest discount applied to a Quote Line Item.

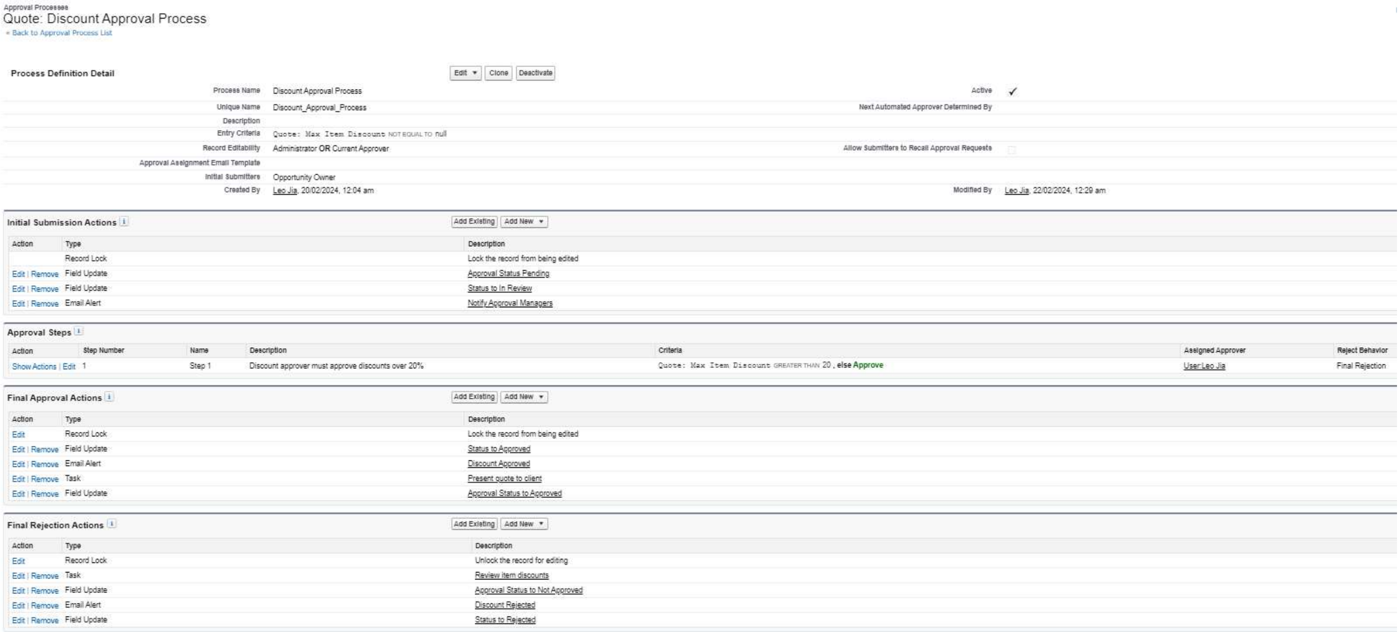



*Figure 23 Quote: Discount Approval Process*

If the discount is less than or equal to 20%, it is automatically approved. If it is greater than 20%, it must be manually approved, as per Step 1. Upon submission, the Approval Status field is set to Pending, and an email alert is sent to the Sales Managers for their review. The email template used is New Discount Approval Request, a Classic Email Template.

If approved, the Approval Status will be set to Approved, an email using the Classic Email Template Discount Approved will be sent to the Order Owner, and a Task to present the quote to the client will be created.

If rejected, the Approval Status will be set to Rejected and an email using the Classic Email Template Discount Rejected will be sent to the Order Owner.

The user will need to review the discounts applied and resubmit for approval.

## 3.4 On Site Visits

On Site Visits is a custom object for MasterSeal Exteriors to document their initial assessment, progress throughout the project, and final inspection.

There are three record types: Initial, During, Final Inspection.

### 3.4.1 On Site Visit Object Fields

*Table 4 On Site Visit Object Key Fields*

| Key Field | Field Name | Data Type | Required |
|---|---|---|---|
| Account | Account__c | Lookup(Account) | |
| Customer Agrees to Time | Customer_Agrees_to_Time__c | Checkbox | |
| Documentation | Documentation__c | Rich Text Area(32000) | |
| Estimated Costs | Estimated_Costs__c | Currency(16,2) | |
| Estimated Days for Completion | Estimated_Days_for_Completion__c | Number(18,0) | |
| Inspection Passed | Inspection_Passed__c | Checkbox | |

| | | | |
|---|---|---|---|
| Issues/Concerns | Issues_Concerns__c | Rich Text Area(32000) | |
| Manager Comments | Manager_Comments__c | Rich Text Area(32000) | |
| On-Site Assessment ID | Name | AutoNumber | Yes |
| Opportunity | Opportunity__c | Lookup(Opportunity) | |
| Order | Order__c | Lookup(Order) | |
| Owner | OwnerId | Lookup(User,Group) | |
| Staff Present | Staff_Present__c | Text Area(255) | |
| Time Arrived | Time_Arrived__c | Date/Time | |
| Time Left | Time_Left__c | Date/Time | |

## 3.4.2 On Site Visit Record Types

### *3.4.2.1 Initial*

The Initial On Site Visit Record Type is designed to be used during the opportunity or sales process stage of the business process. It records details about the initial on-site inspection to create a detailed quote for the prospect that includes a scope of work, materials needed, estimated costs, and a timeline for completion.

Fields for this record type include:

1. On-Site Assessment ID
2. Opportunity
3. Account
4. Proposed Time
5. Customer Agrees to Time
6. Time Arrived
7. Time Left
8. Staff Present
9. Estimated Costs
10. Estimated Days for Completion
11. Documentation
12. Manager Comments

### *3.4.2.2 During*

The During On Site Visit Record Type is designed to be used during the order stage of the business project, while the project is underway. It records details about each on-site visit.

Fields for this record type include:

1. On-Site Assessment ID
2. Order
3. Account
4. Proposed Time
5. Customer Agrees to Time
6. Time Arrived
7. Time Left
8. Staff Present
9. Documentation
10. Issues/Concerns
11. Manager Comments

### *3.4.2.3 Final Inspection*

The Final Inspection On Site Visit Record Type is designed to be used during the Inspection stage of the order, once the project is nearing completion and ready for a final inspection. It tracks who was present at the final inspection, the date and time of the inspection, any outstanding issues or concerns, and whether it passed the final inspection or not.

Fields for this record type include:

1. On-Site Assessment ID
2. Inspection Passed
3. Opportunity
4. Account
5. Proposed Time
6. Customer Agrees to Time
7. Time Arrived
8. Time Left
9. Staff Present
10. Documentation
11. Issues/Concerns
12. Manager Comments

## 3.4.3 On Site Visit Flows

### *3.4.3.1 Final Inspection Checkbox*

When a final inspection has been carried out and the Inspection Passed checkbox has been checked, the Final Inspection Checkbox Flow will update the Final Inspection Passed checkbox of the Order. This enables the Order to progress to the next stage following the Inspection stage.

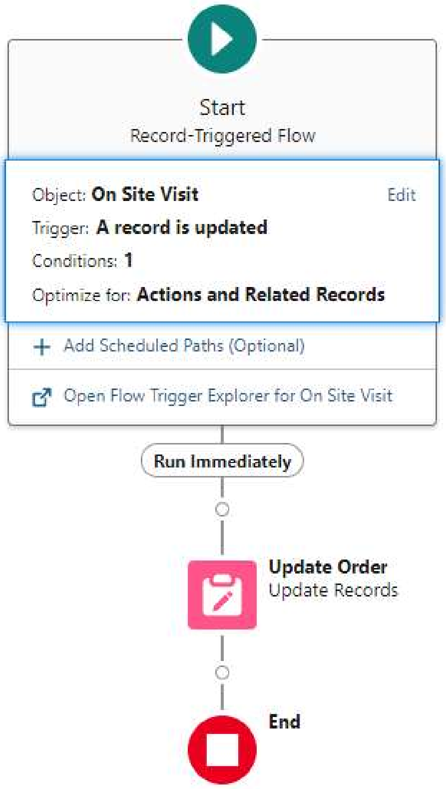



*Figure 24 Final Inspection Checkbox Flow*

### 3.4.3 On Site Visit Page Layouts

On Site Visit objects have three different page layouts with respects to their record types: Initial Assessment Layout, During Layout, Final Inspection Layout. They all display different fields as outlined in Section 3.4.2.

## 3.5 Orders

### 3.5.1 Order Object Fields

*Table 5 Order Object Key Fields*

| Key Field | Field Name | Data Type | Picklist Values | Required |
|---|---|---|---|---|
| Account Name | AccountId | Lookup (Account) | | |
| Account Number | AccountNumber | Text(40) | | |
| Actual Cost of Materials | Cost_of_Materials__c | Currency(16,2) | | |
| Balance | Balance__c | Currency(16,2) | | |
| Budgeted Cost of Materials | Budgeted_Cost_of_Materials__c | Currency(16,2) | | |
| Description | Description | Long Text Area (32000) | | |
| Final Inspection Passed | Final_Inspection_Passed__c | Checkbox | | |
| Opportunity | OpportunityId | Lookup (Opportunity) | | |
| Order Amount | TotalAmount | Currency(16,2) | | |
| Order Start Date | EffectiveDate | Date | | Yes |
| Price Book | Pricebook2Id | Lookup(Price Book) | | |
| Status | Status | Picklist | First Invoice, Set-up, Implementation, Inspection, Final Invoice, Follow-up, Complete | |

#### *3.5.1.1 Balance*

The Balance field displays the remaining amount that a customer must pay on their entire bill. Theoretically, it should start at 100% of the Order Amount, and then 50% of the Order Amount after the first invoice. However, customers may pay in multiple instalments, so this field keeps track of the order balance.

This field is automatically updates with each update of a child Invoice record.

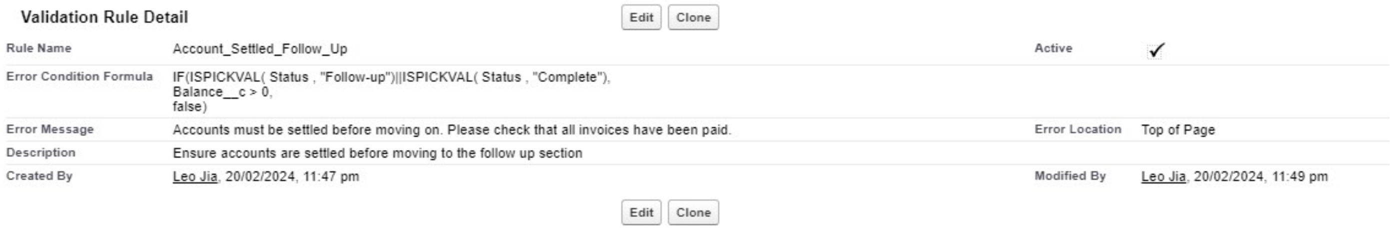
#### *3.5.1.2 Actual Cost of Materials*

The Actual Cost of Materials field is automatically updated as the Cost of Materials Per Unit field on a child Order Product is updated.

### 3.5.2 Order Validation Rules

#### *3.5.2.1 Account Settle – Follow-up*

For an Order to move on to the Follow-up stage, all accounts must be settled. This means that Balance must be $0.



**Validation Rule Detail** Edit Clone

| | | | |
|---|---|---|---|
| Rule Name | Account_Settled_Follow_Up | Active | ✓ |
| Error Condition Formula | IF(ISPICKVAL( Status , "Follow-up")\|\|ISPICKVAL( Status , "Complete"),<br>Balance__c > 0,<br>false) | | |
| Error Message | Accounts must be settled before moving on. Please check that all invoices have been paid. | Error Location | Top of Page |
| Description | Ensure accounts are settled before moving to the follow up section | | |
| Created By | Leo Jia, 20/02/2024, 11:47 pm | Modified By | Leo Jia, 20/02/2024, 11:49 pm |

Edit Clone

*Figure 25 Account Settled - Follow Up Validation Rule*

## 3.5.3 Order Flows

### *3.5.3.1 Order Status Flows*

The Order Status Flows Flow performs actions based on the new Status of an Order.

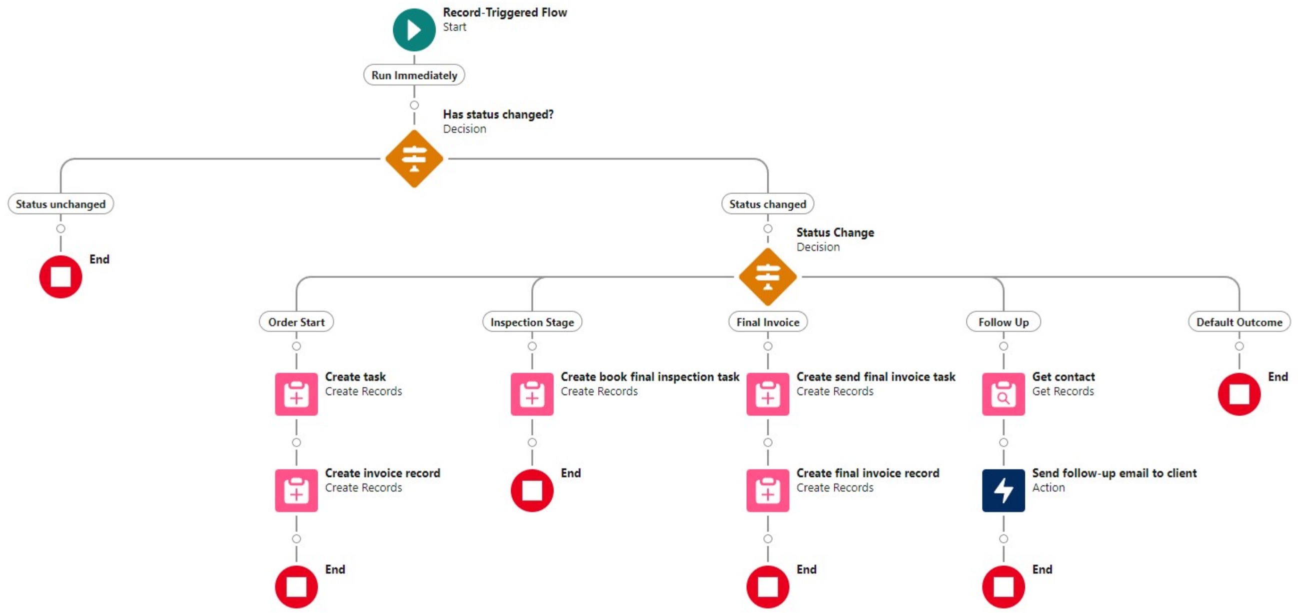



*Figure 26 Order Status Flows*

When the Order starts (Status equals First Invoice), an Invoice Record is created with 50% of the total amount due for the project, as well as a task to send the invoice to the client.

When the Order is in the Inspection Stage, a task is created to book the final inspection.

When the Order is in the Final Invoice Stage, an Invoice Record is created with the remaining amount due for the project (the Balance amount), as well as a task to send the invoice to the client.

When the Order is in the Follow Up Stage, a follow-up email is sent to the related Contact(s) asking for feedback, post-project concerns, etc. The email uses a Lightning Email Template - Follow-Up Email for Client.

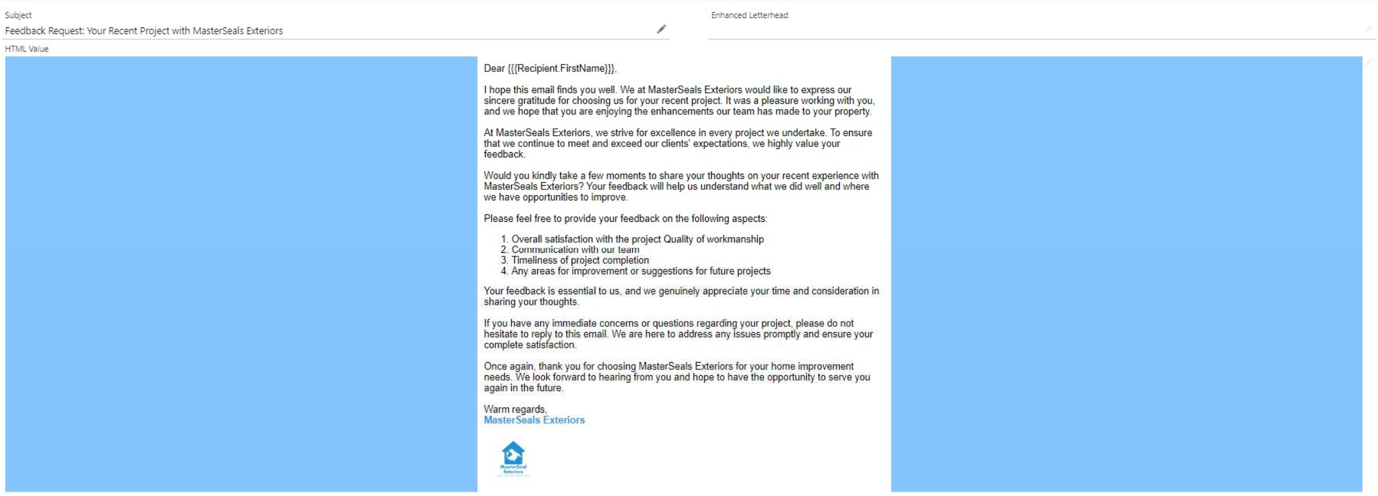



*Figure 27 Feedback Request Lightning Email Template*

### *3.5.3.2 Order – Materials Over Budget Flow*

When the Cost of Materials field has changed, the Order – Materials Over Budget Flow is activated.

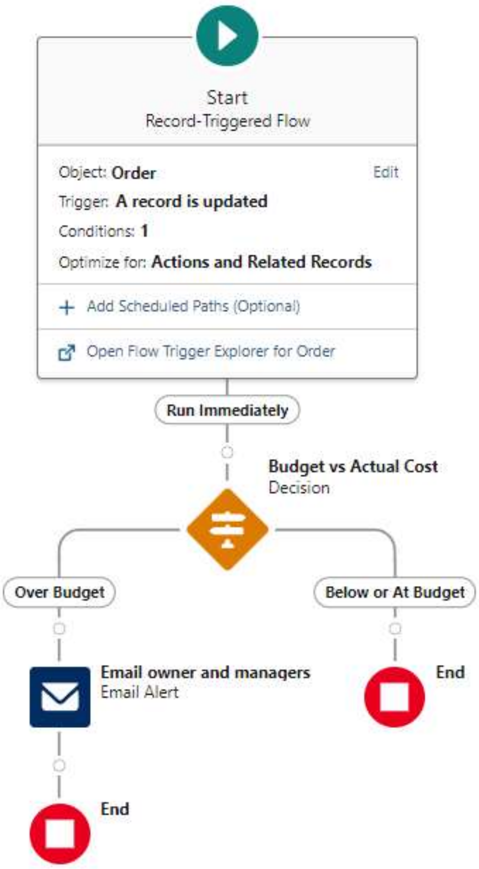



*Figure 28 Order - Materials Over Budget Flow*

If the Cost of Materials is more than the Budgeted Cost of Materials, an Email Alert using a Classic Email Template, Materials Over Budget, is sent to the Sales Managers.

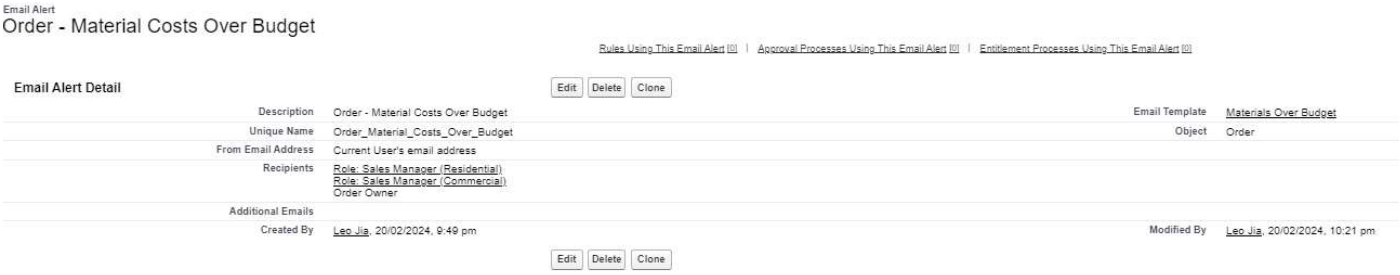



*Figure 29 Order - Materials Over Budget Email Alert*

## 3.5.4 Order Page Layouts

All Orders share the same Page Layout and Lightning Record Page. They have been carefully designed to display all relevant information in one page.

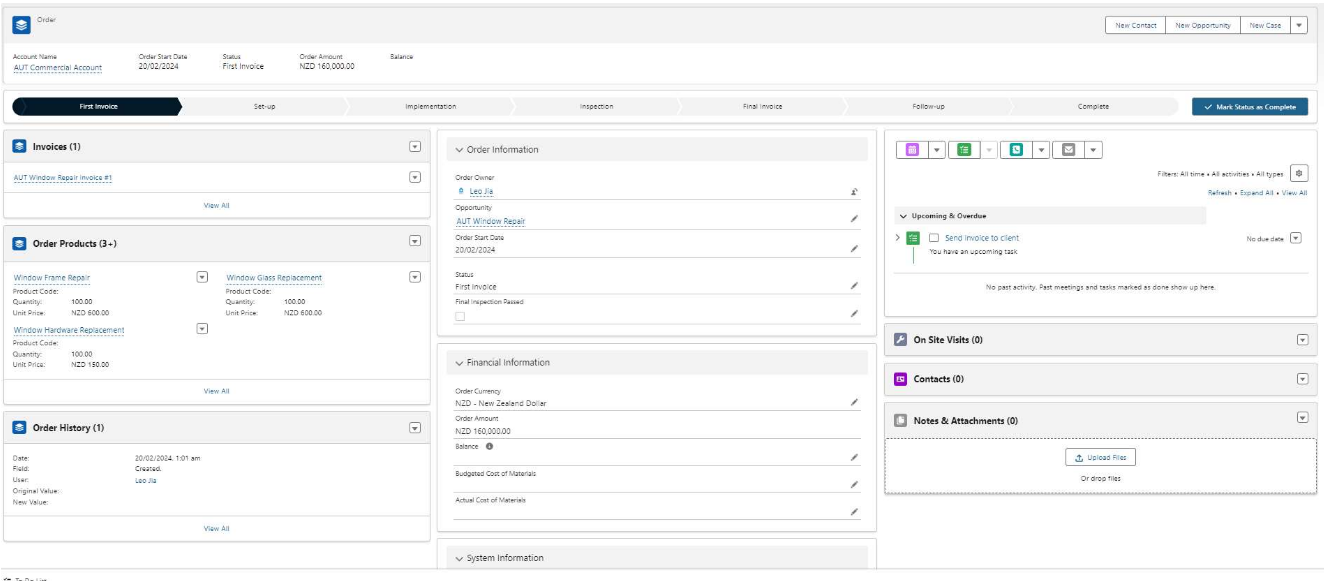



*Figure 30 Order Record Page*

# 3.6 Price Books and Products

## 3.6.1 Price Books

There are four Price Books. NZ – Commercial, NZ – Residential, AU – Commercial, AU – Residential. The AU Price Books use AUD and are for customers in Australia, while the NZ Price Books use NZD and are for customers in New Zealand.

Note: the default currency for this Salesforce org is NZD as MasterSeal Exteriors is a NZ company and most of their operations are still in NZ.

## 3.6.2 Products

Each service that MasterSeal Exteriors offers (Roof Leak Repair) has two Product entries, one for commercial clients with commercial prices, and one for residential clients with residential prices.

In the Product Description field, a price range is given as per the product requirements gathered.

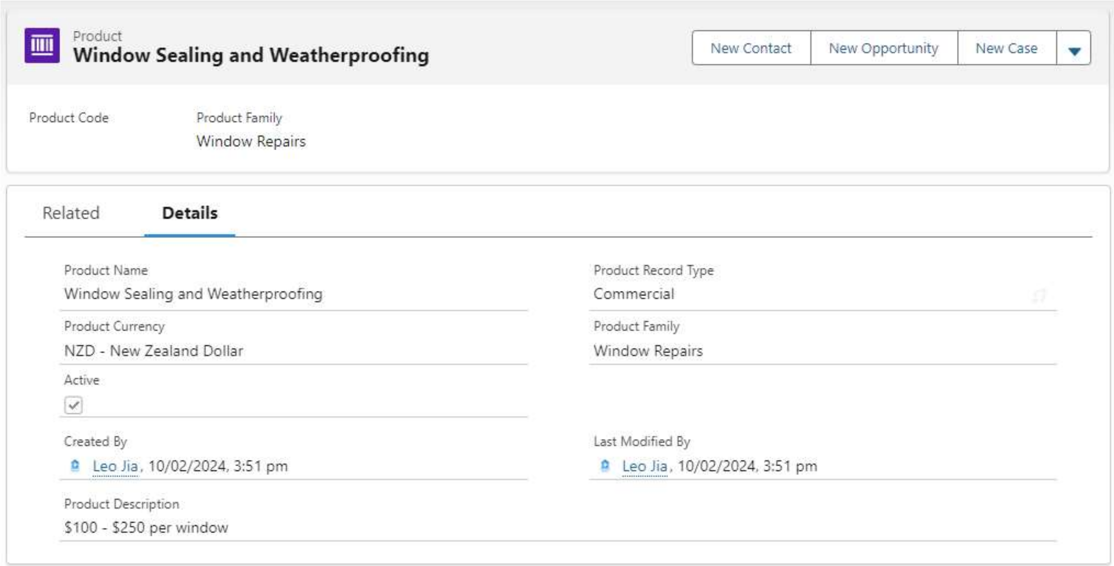



*Figure 31 Window Sealing and Weatherproofing Product Record Page*

## 3.7 Order Products

### 3.7.1 Order Product Object Fields

*Table 6 Order Product Object Key Fields*

| Key Field | Field Name | Data Type | Required |
|---|---|---|---|
| Cost of Materials Per Unit | Cost_of_Materials_Per_Unit__c | Currency(16,2) | |
| List Price | ListPrice | Currency(16,2) | |
| Order | OrderId | Lookup(Order) | Yes |
| Original Order Product | OriginalOrderItemId | Lookup(Order Product) | |
| Product | Product2Id | Lookup(Product) | |
| Quantity | Quantity | Number(16,2) | Yes |
| Quote Line Item | QuoteLineItemId | Lookup(Quote Line Item) | |
| Receipts and Conditions of Materials | Receipts_and_Condition_of_Materials__c | Rich Text Area(32000) | |
| Total Cost of Materials | Total_Cost_of_Materials__c | Formula(Currency) | |
| Total Price | TotalPrice | Currency(16,2) | |
| Unit Price | UnitPrice | Currency(16,2) | Yes |

#### *3.7.1.1 Total Cost of Materials*

The Total Cost of Materials is calculated by multiplying the Cost of Materials Per Unit price by the Quantity.

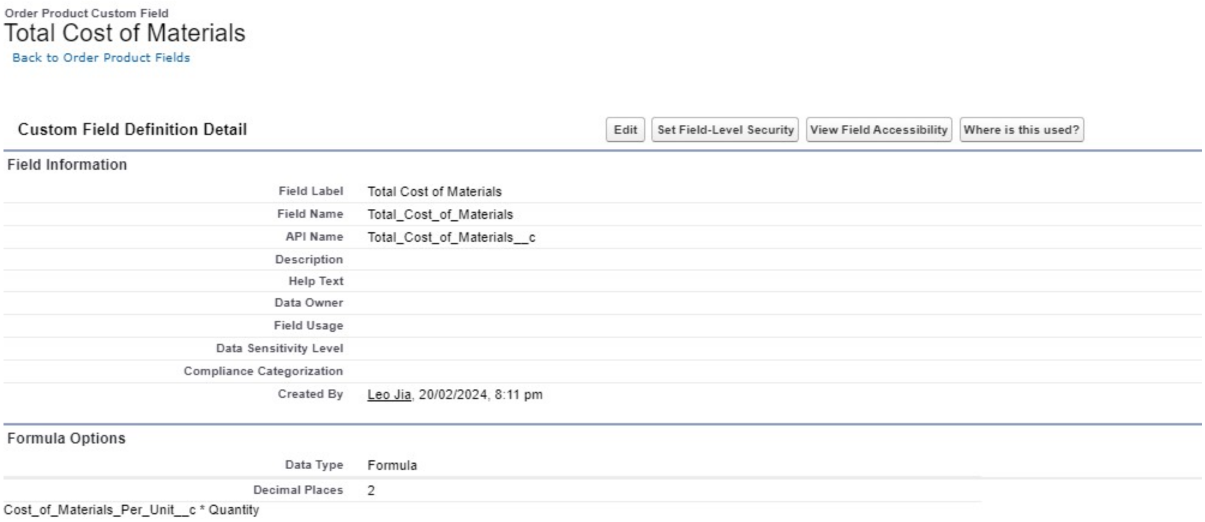



*Figure 32 Total Cost of Materials Field (With Formula)*

### 3.7.2 Order Product Flows

#### *3.7.2.1 Order Product Material Cost – Order Material Cost Flow*

When the Cost of Materials Per Unit field of the Order Product is changed, a Flow is activated to update the Actual Cost of Materials field of the Order record.

## 3.8 Invoices

Note: The Invoice object in this org is a custom object made due to limitations with using the default Salesforce Invoice object.

### 3.8.1 Invoice Object Fields

*Table 7 Invoice Object Key Fields*

| Key Field | Field Name | Data Type | Required |
|---|---|---|---|
| Amount Paid | Amount_Paid__c | Currency(16,2) | |
| Balance | Balance__c | Formula(Currency) | |
| Billing Account | Billing_Account__c | Lookup(Account) | Yes |
| Invoice Date | Invoice_Date__c | Date | |
| Invoice ID | Invoice_ID__c | Auto Number | |
| Invoice Name | Name | Text(80) | Yes |
| Opportunity | Opportunity__c | Master-Detail(Opportunity) | Yes |
| Order | Order__c | Master-Detail(Order) | Yes |
| Total Charge | Total_Charge__c | Currency(16,2) | |

#### *3.8.1.1 Balance*

Balance is the amount left that the client needs to pay. It is calculated by subtracting the Amount Paid from the Total Charge.

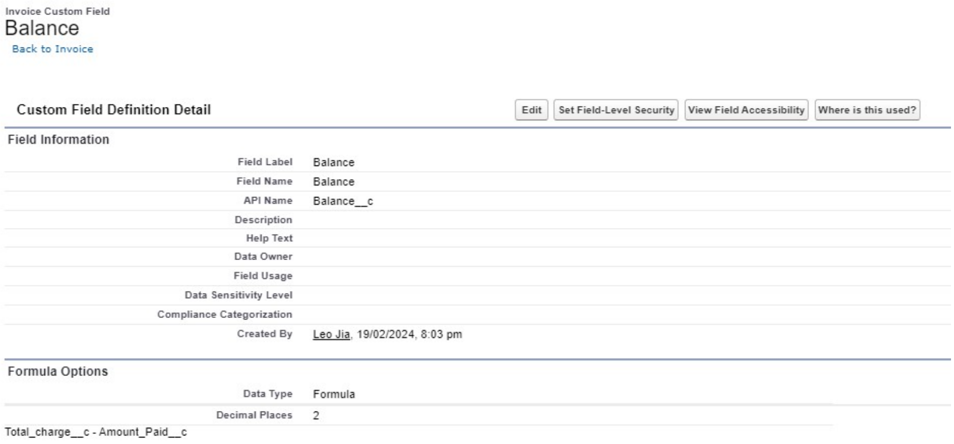



*Figure 33 Balance Field (With Formula)*

## 3.8.2 Flows

### *3.8.2.1 New Invoice Flow*

Upon the creation of a new Invoice record, the name is updated. The name is prepended with the name of the parent Opportunity.

### *3.8.2.2 Invoice Balance – Order Balance*

If an Invoice Balance has been changed, the Balance field on the Order record is also updated. This is achieved by a simple flow and a formula, where the Amount Paid field of an Invoice triggers action.

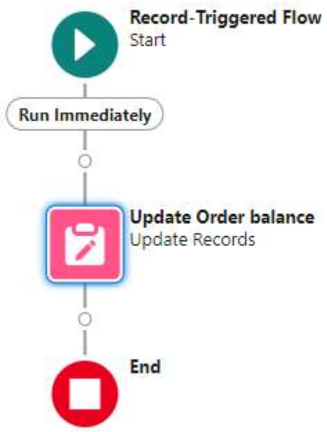



*Figure 34 Invoice Balance - Order Balance Flow*

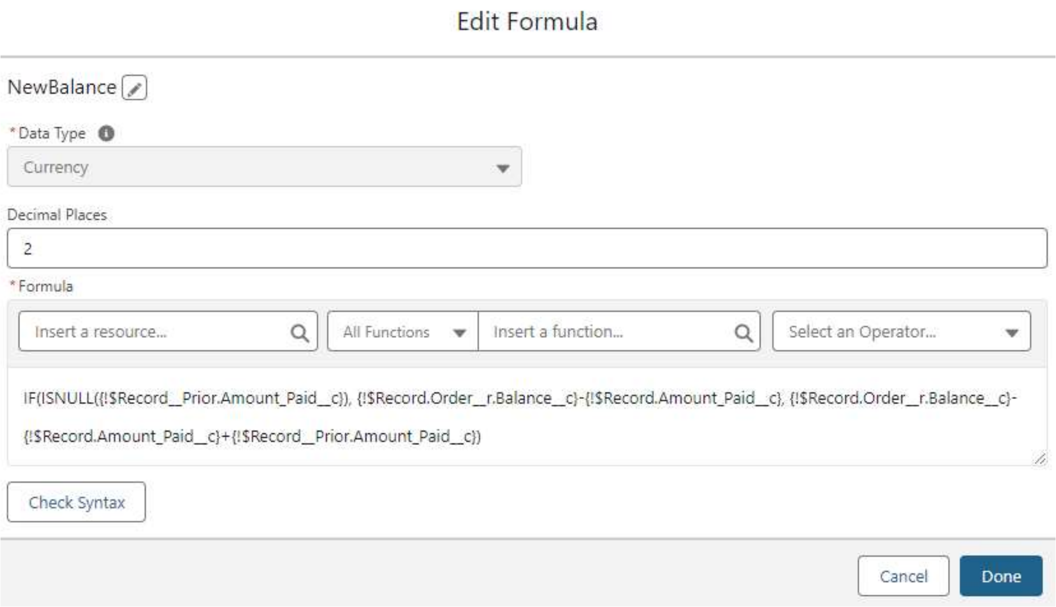



*Figure 35 NewBalance Formula in "Invoice Balance - Order Balance" Flow*

## 3.9 Reports

Reports are intended to gather and display valuable insights from Salesforce, allowing MasterSeal Exteriors' users and admins to make more informed decisions regarding Salesforce and business operations.

### 3.9.1 Sales Reports

Sales reports are used to analyse and track sales-related data, providing insights into various aspects of the sales process, performance metrics, and trends.

1. Closed-Won Opportunities
   Purpose: monitor and analyse the details of Closed-Won Opportunities, including revenue, products and services sold, number of days between opening and closing
2. Current Orders in Progress
   Purpose: track current orders to see their progress
3. Leads by Source
   Purpose: track the sources of leads to identify which marketing channels or efforts are most effective in generating business
4. Sales Funnel Report
   Purpose: visualise the sales pipeline to see how leads progress from initial contact to closure to identify areas for efficiency improvement
5. Top Sales Opportunities
   Purpose: identify and prioritise the most promising sales opportunities, allowing sales teams to focus their efforts on high-value leads

### 3.9.2 Admin Reports

Admin reports are used to provide insights on the usage, configuration, and performance of a Salesforce org.

1. Identity Verifications by User
   Purpose: allows admins to monitor user authentication activities and assist in ensuring that users are complying with security protocols
2. Inactive Users report
   Purpose: identify users who have not logged in to the Salesforce org within a specified period, allowing for admins to manage user licenses effectively

3. Login Frequency Report
   Purpose: provides insights into user login patterns and frequency to help admins understand user engagement and adoption levels
4. New Login Locations Report
   Purpose: identify new or unfamiliar login locations for user accounts, helping admins to monitor and mitigate potential security risks
5. Users in Each Profile
   Purpose: visualise the distribution of users across different profiles within the Salesforce org

## 3.10 Dashboards

Dashboards are an effective way to have key metrics presented on one screen.

1. Sales Performance Dashboard

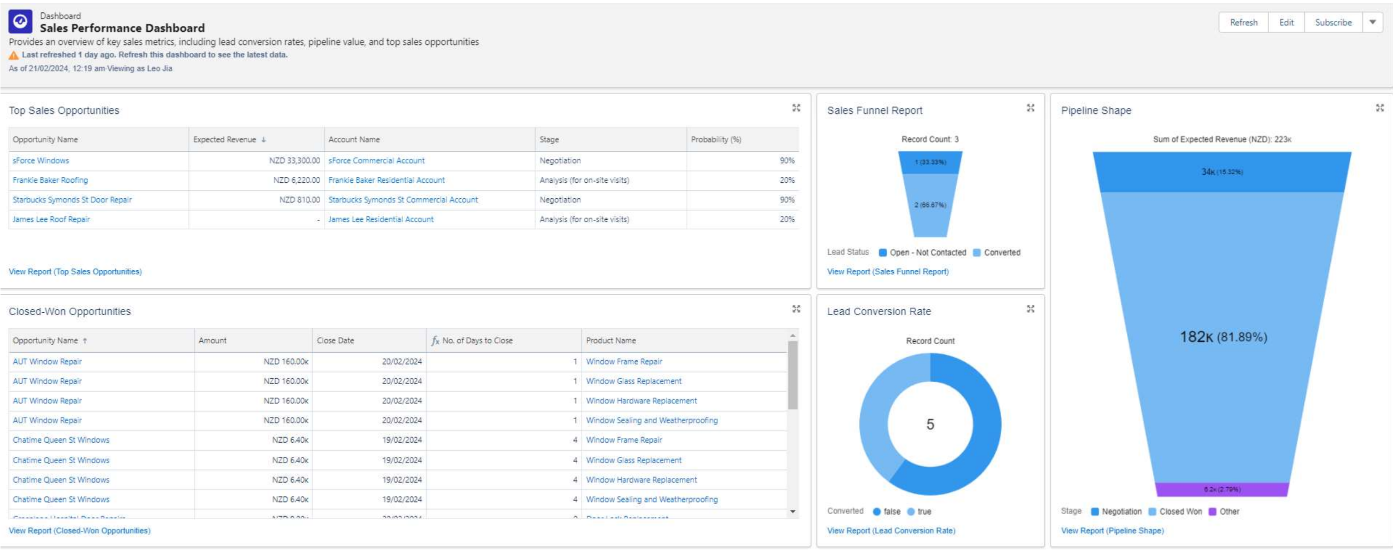



*Figure 36 Sales Performance Dashboard*

2. Salesforce Admin Dashboard

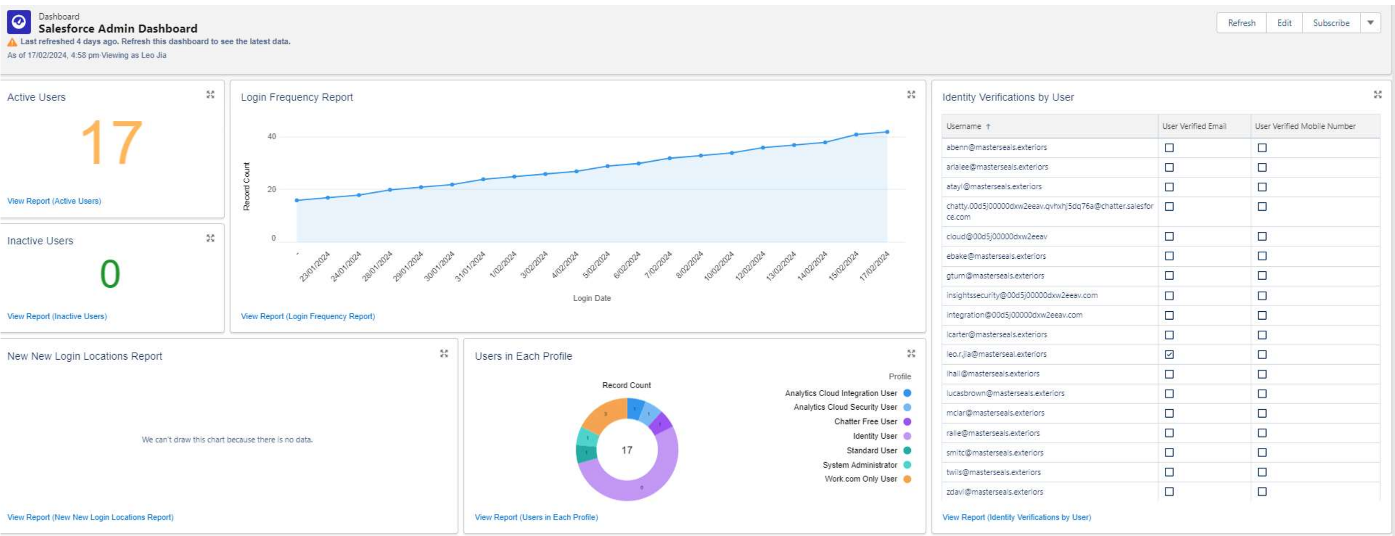



*Figure 37 Salesforce Admin Dashboard*

# 4 Additional Documentation

## 4.1 User Guides

### 4.1.1 Importing Leads

Leads can be imported into the Salesforce org using a CSV file. Below is a step-by-step guide for the process:

1. Navigate to the Leads Page.
2. Click “Import” on the top right-hand side of the page, launching the import wizard.

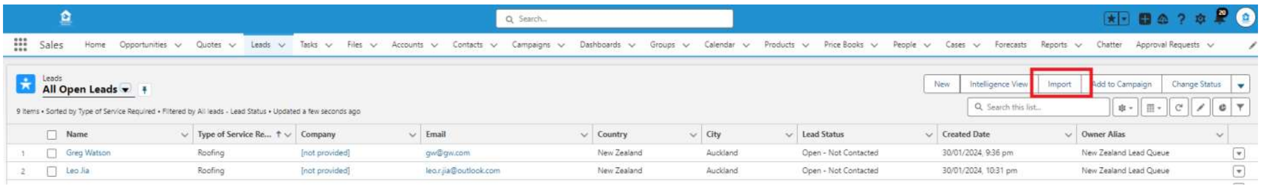


*Figure 38 Leads Home Page With "Import" Button Highlighted*

3. When in the import wizard, select “Leads” under Standard Objects, and “Add new records” in the next column.

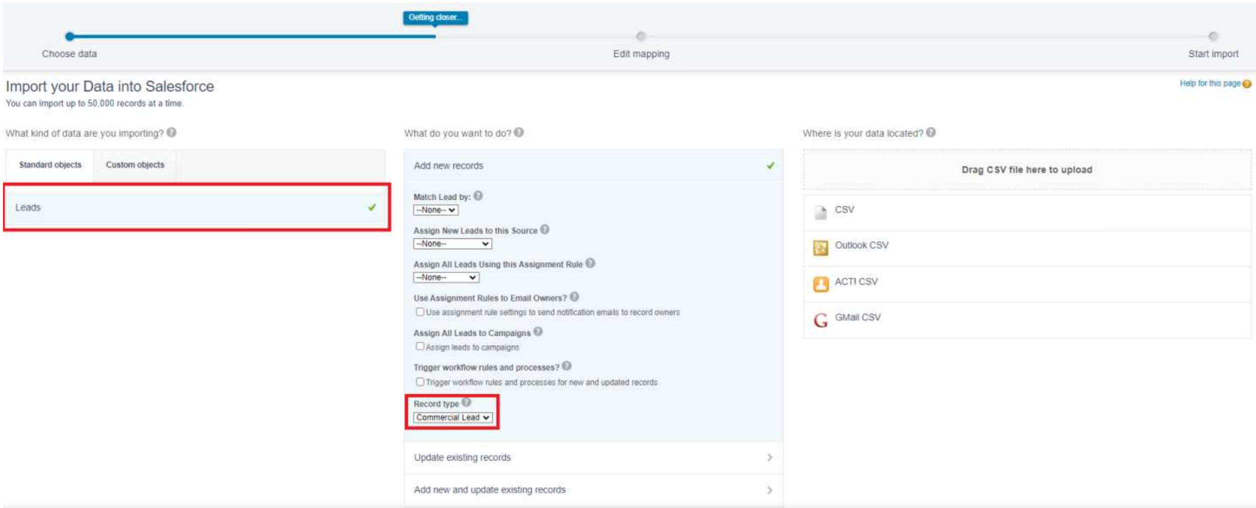



*Figure 39 Import Wizard Page with "Leads" button and "Record Type" Dropdown Highlighted*

4. Select all relevant fields based on your requirements and preferences.
5. Note that you may only import Leads of one Record Type at a time, so ensure that your Leads are separated into residential and commercial leads.
6. Prepare the data, ensuring it is in a CSV (comma separated values) file format, and that all necessary fields such as name, email, phone number, company etc are included.
7. Import your file in the last column and press “Next” on the bottom right corner.

8. Review the mapped fields. Click “Change” on the first cell of each row to change the mapping of a field.

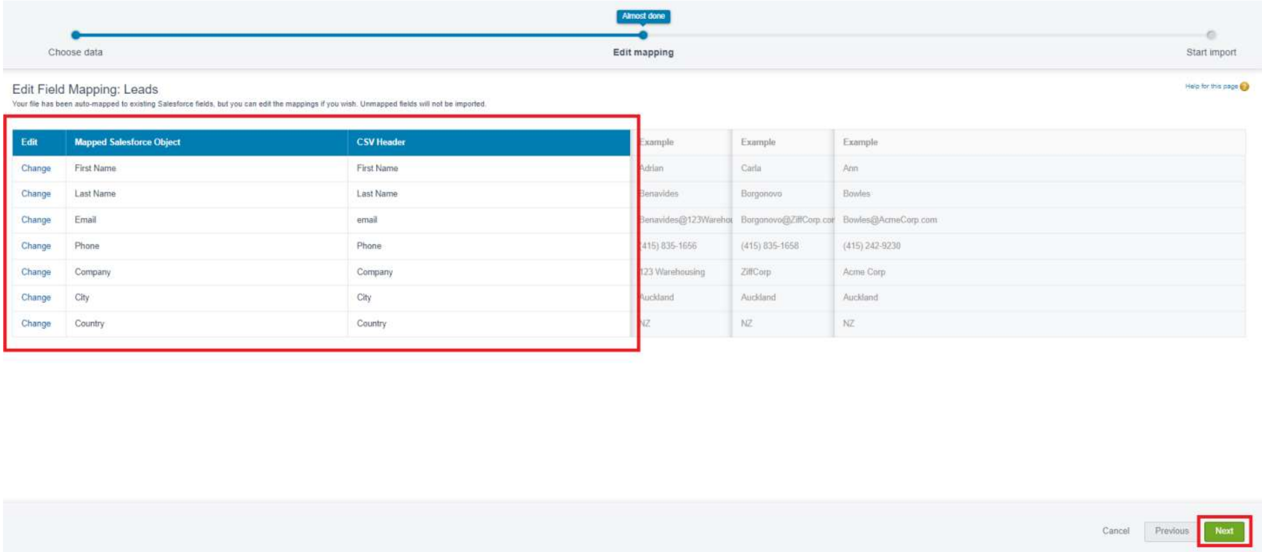



*Figure 40 Import Wizard Page with Relevant Table Highlighted*

9. Click "Next", review the number of mapped fields, and click "Start Import".

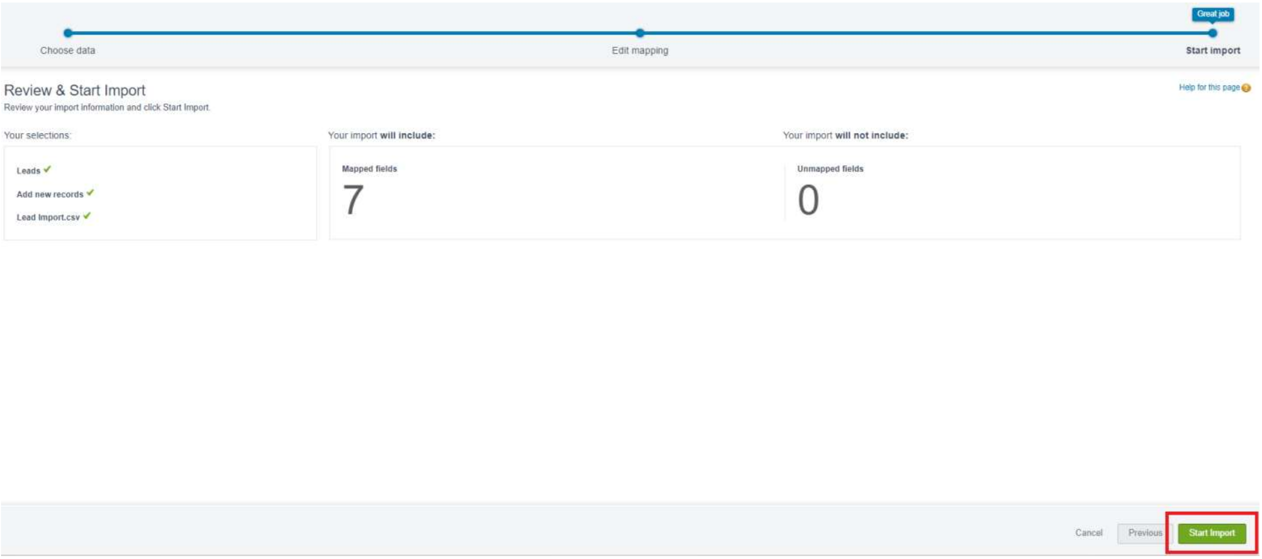



*Figure 41 Import Wizard Review Page*

10. Lastly, you will be taken to a Bulk Data Load Jobs page where you can track the progress of the import and review the data. Pay close attention to the Records Processed and Records Failed fields to ensure that the import was successful.

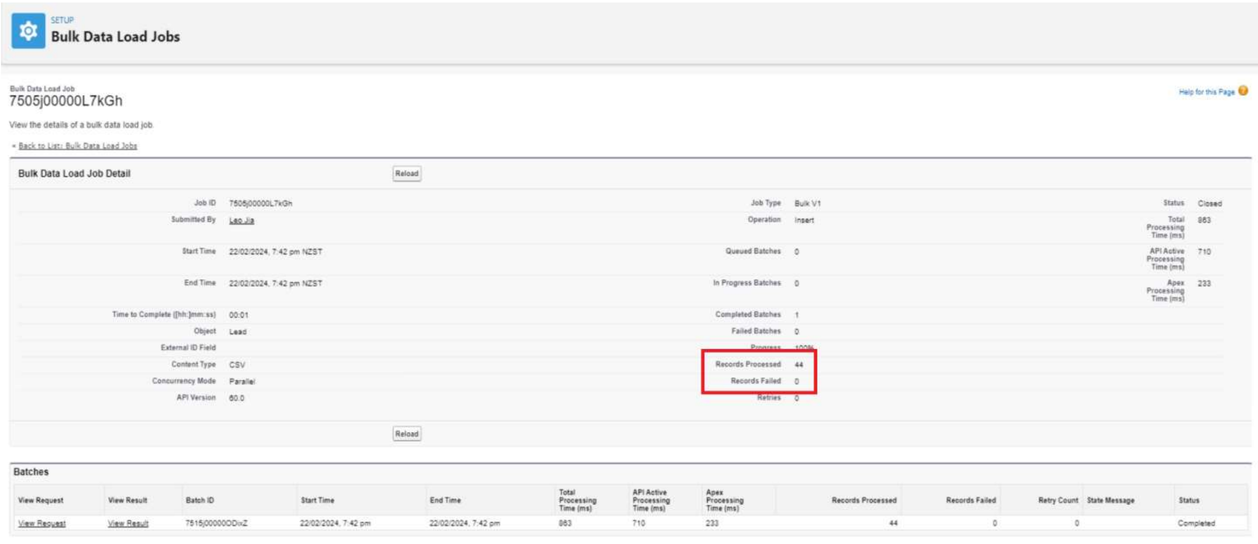



*Figure 42 Bulk Data Load Jobs Page*

## 4.1.3 Setting Notifications for Activities

Notifications can be set up for activities in Salesforce to help users stay informed and on top of tasks. Below is a step-by-step guide:

1. Click your profile icon in the top and "Settings" in the dropdown menu.

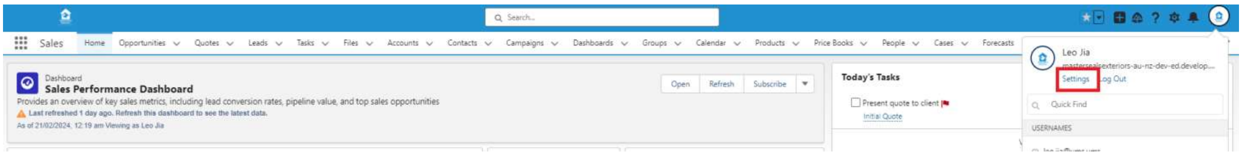



*Figure 43 Salesforce Home Page with Profile Dropdown and "Settings" Button Highlighted*

2. In the Quick Find search box on the left enter "Activity" and click "Activity Reminders".
3. Configure your settings to suit your preferences.

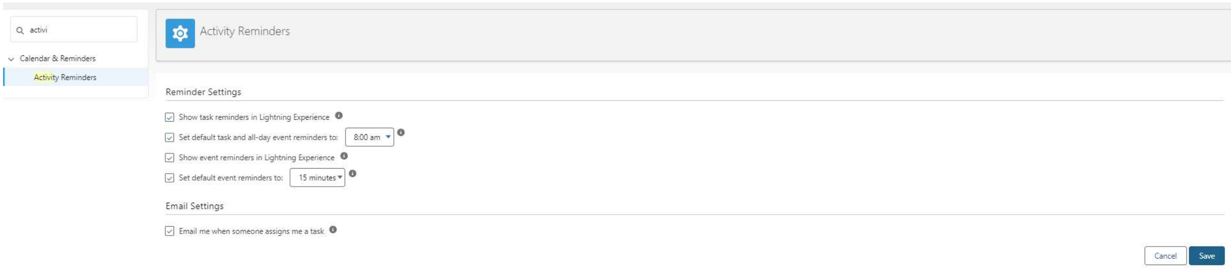



*Figure 44 Activity Reminders Settings Page*

4. In the Quick Find search box search for and select "Email Notifications"

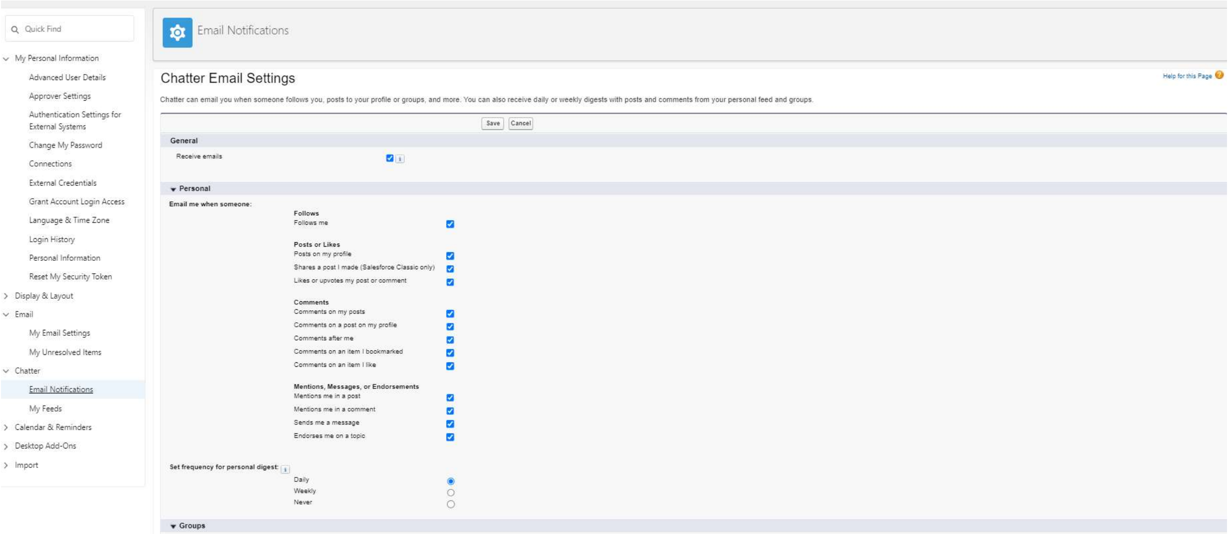



*Figure 45 Chatter Email Notifications Settings Page*

Should MasterSeal Exteriors choose to use Chatter, these email settings will extremely useful for all users.

# 4.2 Salesforce Admin Documentation

## 4.2.1 How to Create New Users

### *4.2.1.1 Individually*

Salesforce Admins can create new users individually by searching “Users” in the Quick Find box in the Setup page

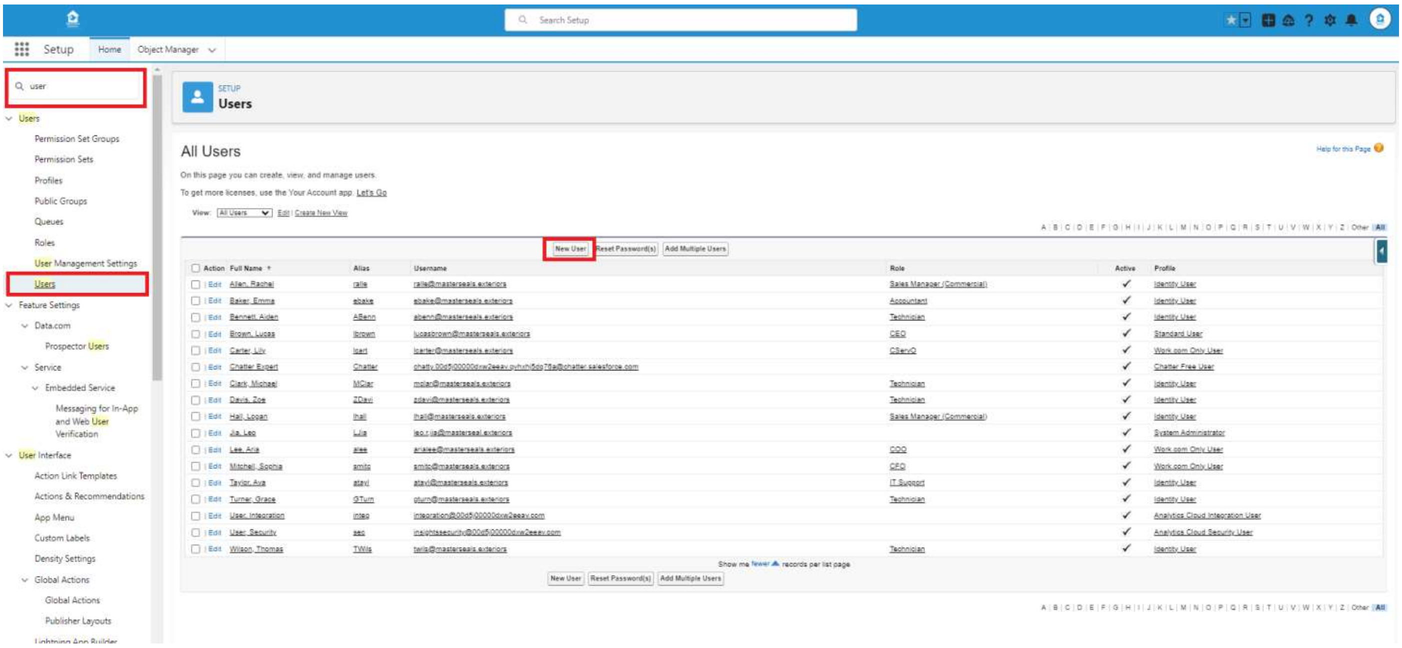



*Figure 46 Users Setup Page with "New User" Button Highlighted*

And then selecting “New User”. They will then be directed to a form to fill with user information.

### *4.2.1.2 Up to Ten at Once*

Salesforce Admins can add up to ten users at once by searching “Users” in the Quick Find box in the Setup page, and then selecting “Multiple Users”.

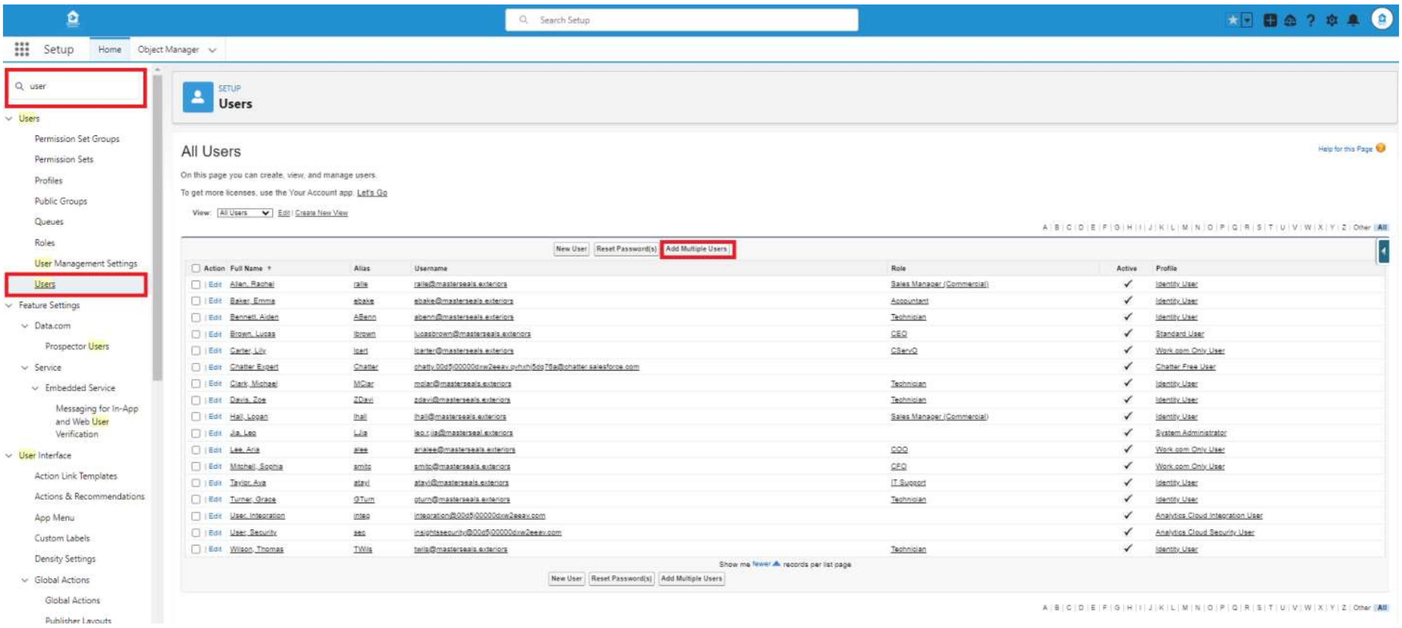



*Figure 47 User Setup Page with "Add Multiple Users" Button Selected*

Note: that only one User License can be selected and applies to all users created using this method.

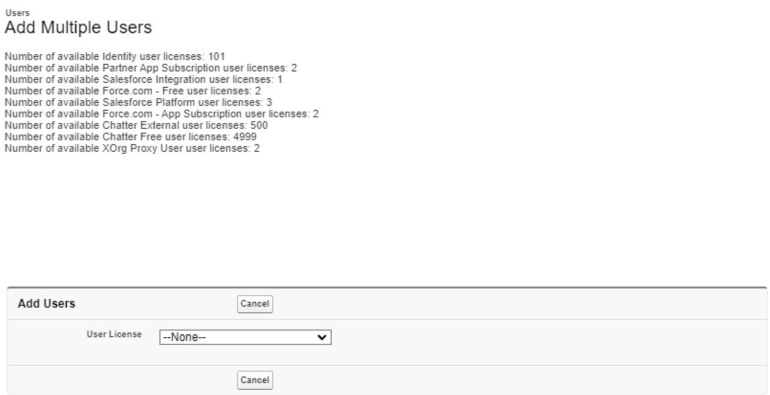



*Figure 48 Add Multiple Users Page*

#### *4.2.1.3 More Than Ten at Once*

To create more than ten users at once, Data Loader must be used. Here is a quick guide for it:

1. Before starting, ensure you have prepared a CSV file properly with the following required information:
    i. Alias
    ii. Username
    iii. Email
    iv. First Name
    v. Last Name
    vi. Locale
    vii. Language
    viii. Email Encoding
    ix. Time Zone
    x. Currency
    xi. ProfileId
2. In Setup, search “Data Loader” in the Quick Find box and select it on left panel.

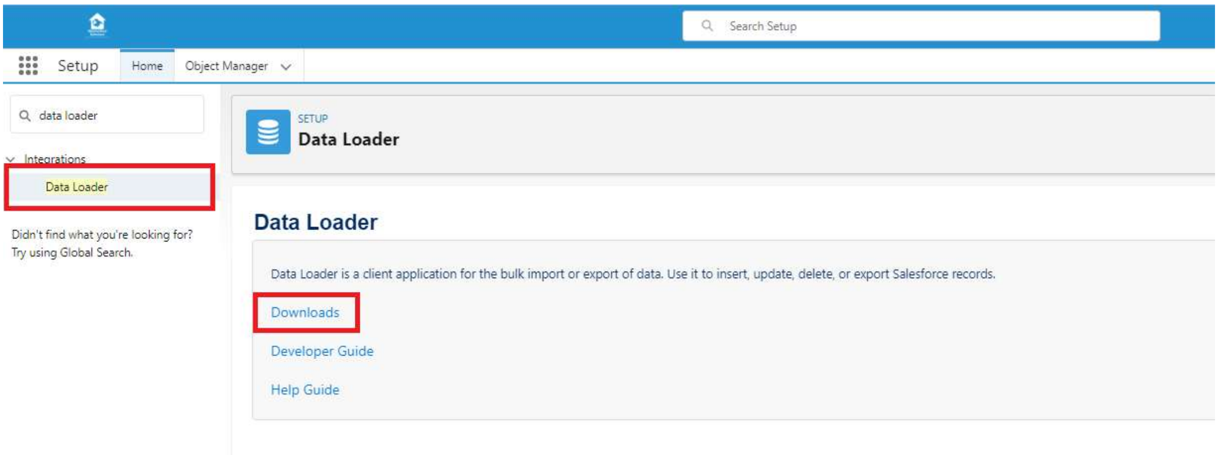



*Figure 49 Data Loader Setup Page*

3. Click Downloads and download Data Loader for your computer.
4. Launch Data Loader and log in. Press "Insert" and select the User object.

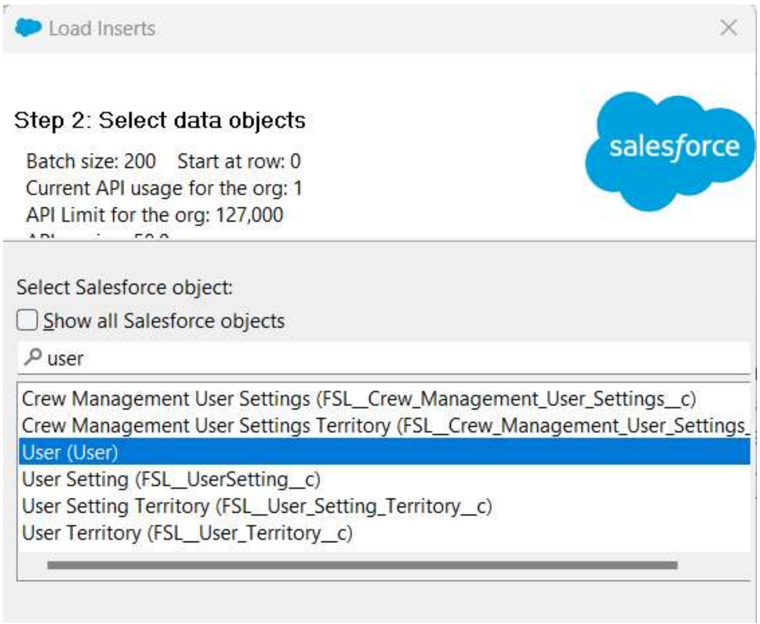



*Figure 50 Data Loader Select Data Objects*

5. Choose the prepared CSV file and click "Next", and then "OK".
6. You should be at Mapping, where the columns in the CSV file will appear as a list.

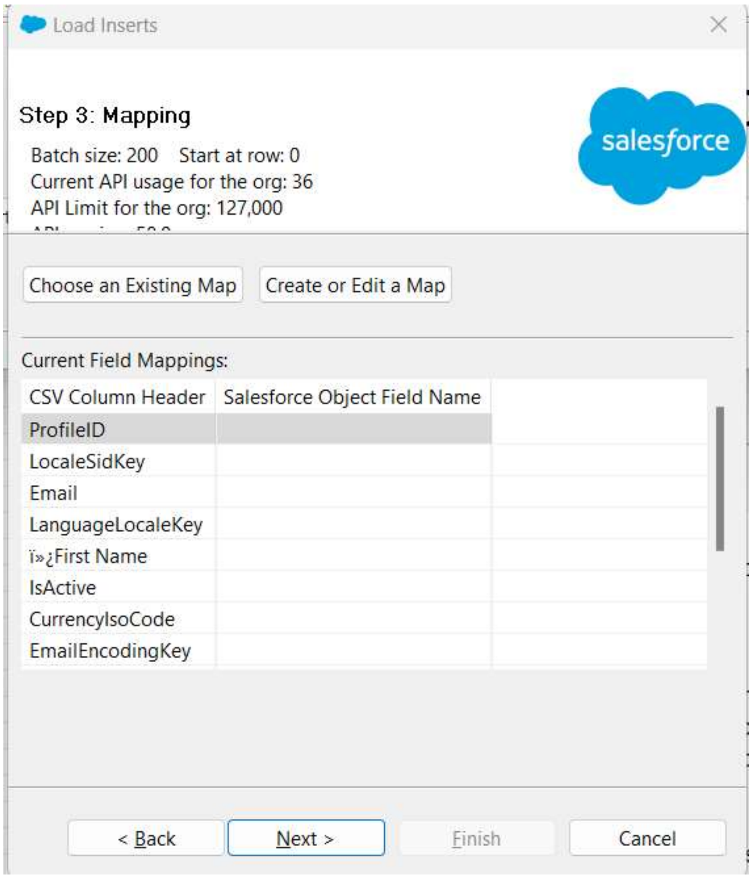



*Figure 51 Data Loader Mapping*

7. Click “Create or Edit a Map” and then “Auto-Match Fields to Columns”.
8. Double check the resulting mappings and go over some that didn’t map successfully.
9. Click “Next”, specify the location for saving the error and success files, and then click “Finish”.
10. Once the process is finished, Data Loader will let you know whether it was successful.

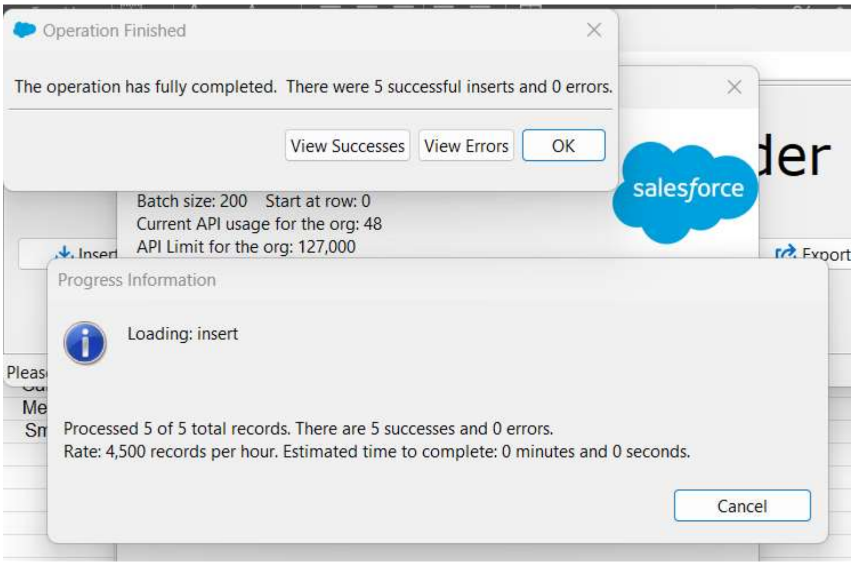



*Figure 52 Data Loader Operation Popups*

11. Since passwords cannot be imported in Data Loader, you will have to do a password reset via the Salesforce UI, in Setup>Users. Check the checkboxes beside user’s names and hit “Reset Password(s)”

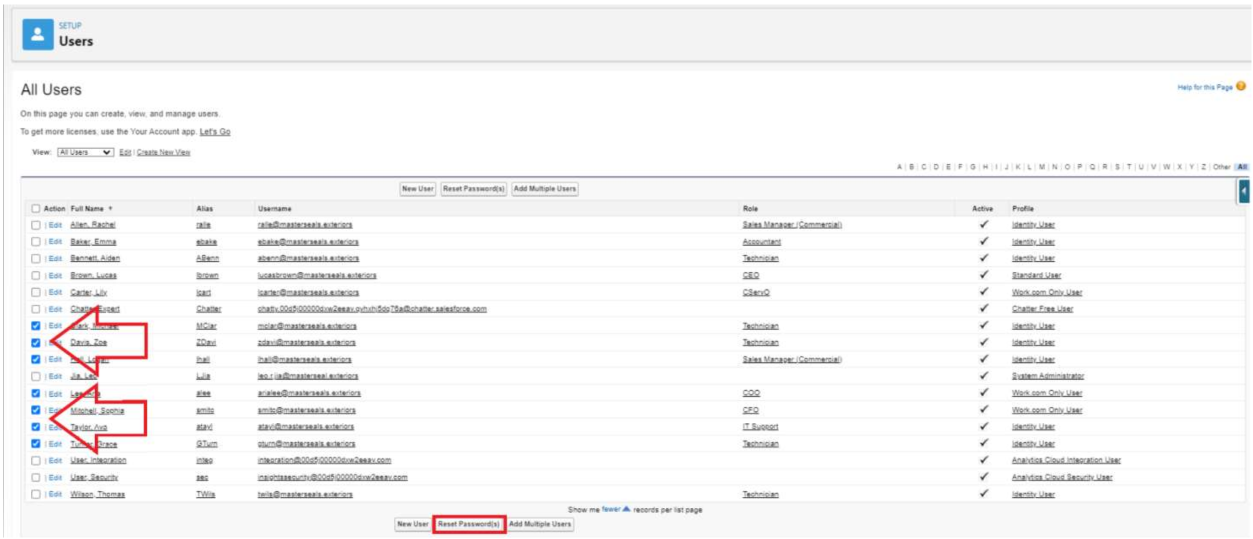



*Figure 53 Users Setup Page with "Reset Password(s)" Button Highlighted*

## 4.2.2 User License Recommendations

1. Developer License

   This license is recommended for Salesforce administrators or developers, users whose role is to build customisations or applications.

2. Salesforce

   This license is recommended for all users who require full access to standard and custom apps. Since this solution uses the standard Sales app and standard objects for majority of the business process, most users such as the CEO, people in the Sales and Marketing Department, Finance and Accounting Departments.

3. Salesforce Platform Licenses + Feature Licenses

   Since they do not need to deal any part of the leads or sales process, technicians could get by with a Salesforce Platform Starter License. This allows them to access up to 10 custom objects and some CRM functionalities, which is enough for them to log “On Site Visits”. Feature Licences could be added on a case-by-case basis if required.

## 4.2.3 Data Backup Recommendations

It is essential to develop a routine data backup strategy, for data management and security. It is important to back up both data (concerned with records) and metadata (concerned with configuration settings, custom fields, page layouts, etc.)

There are multiple backup options for Salesforce. Since MasterSeal Exteriors is not a large company nor do they use Salesforce extensively, Salesforce Weekly Data Export is a good solution. It automatically exports the org’s data in the form of zip files containing CSV files. This tool primarily focuses on org data, so another tool will be needed to backup metadata. Salesforce’s Metadata API is a suitable option to automate this process.

However, third-party solutions should also be considered, as having a backup solution built within the Salesforce platform is risky. SysCloud has an intelligent backup solution allowing for automated backups of all standard and custom objects as well as metadata.

## 4.2.4 Importance of Setup Audit Trail

Salesforce Setup Audit Trail tracks setup changes that admins make, especially useful when there are multiple admins in an org. Here are several reasons why it is an important feature to have:

1. It provides visibility into changes.

The Setup Audit Trail provides a detailed history of setup changes made. It allows admins to track who made the changes, what changes were made, and when they were made.

2. Helps with security monitoring.

   It allows admins to detect unauthorized or suspicious changes to the Salesforce configuration. By regularly reviewing the audit trail, admins can identify potential security threats and take actions against them early.

3. Historical reference and change management.

   The visibility into the change history allows for easy review of configuration changes as well as seeing how changes have evolved over time. This can be valuable for decision making and planning for future changes.