



Technical Documentation

MasterSeal Exteriors Salesforce Solution

Leo Jia

23 February 2024

[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.

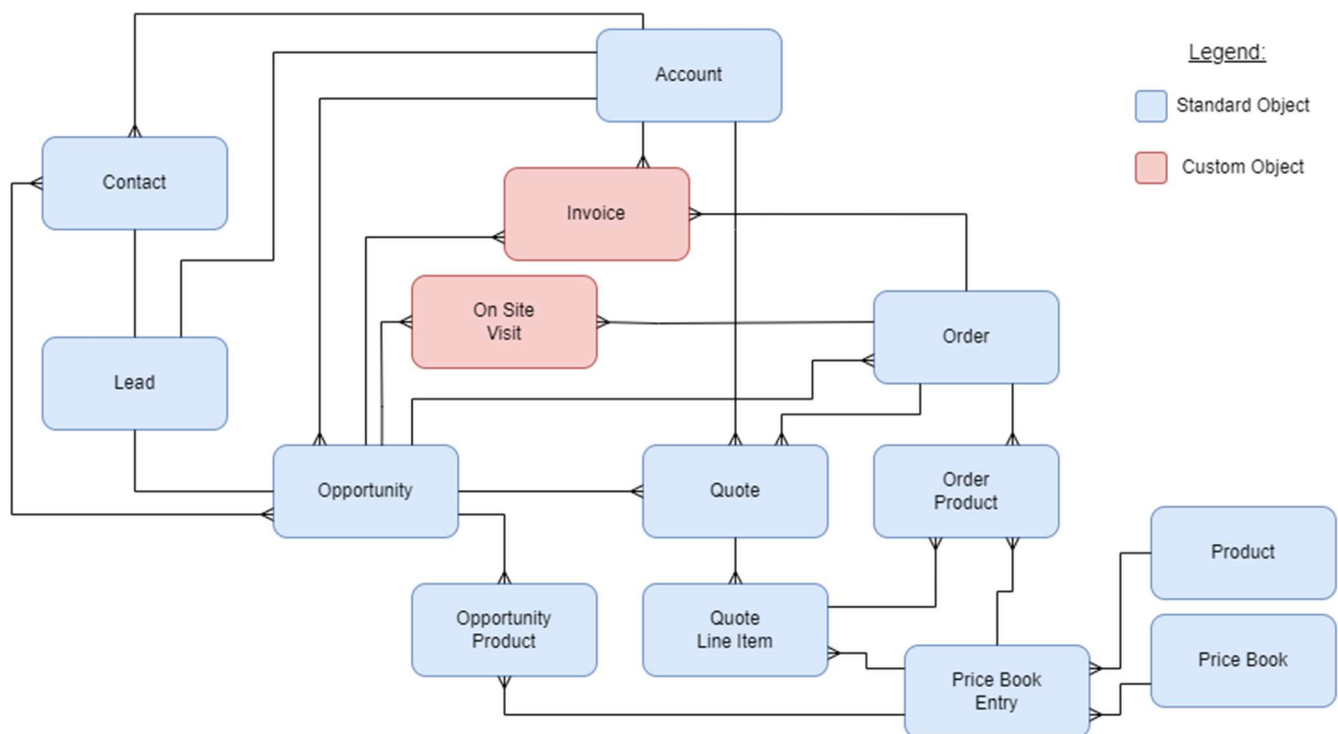


Figure 1 MasterSeal Exteriors Salesforce Data Model

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.

Lead Validation Rule


[Back to Lead Validation Rules](#)

Validation Rule Detail			
Rule Name	Lead_Conversion_Rules	Active	<input checked="" type="checkbox"/>
Error Condition Formula	IsConverted = TRUE && ((ISBLANK(Email)) (ISBLANK(Phone)) (ISBLANK(Description_of_Project_Issue__c)) (SPICKVAL(Preferred_Contact_Method__c, "")))		
Error Message	Leads must have the following before they can be converted: an email, phone number, description, preferred contact method.	Error Location	Top of Page
Description	Leads must have the following before they can be converted: an email, phone number, description, preferred contact method.		

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

Convert Lead

 Validation error on Lead: Leads must have the following before they can be converted: an email, phone number, description, preferred contact method.

Account
Create New

- OR -

Choose Existing

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.

Lead Fields	Contact Fields
Description Of Project/Issue	None
Preferred Contact Method	Preferred Contact Method
Type Of Service Required	None

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.

Lead Fields	Opportunity Fields
Description Of Project/Issue	Description of Project/Issue
Preferred Contact Method	None
Type Of Service Required	Type of Service Required

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.

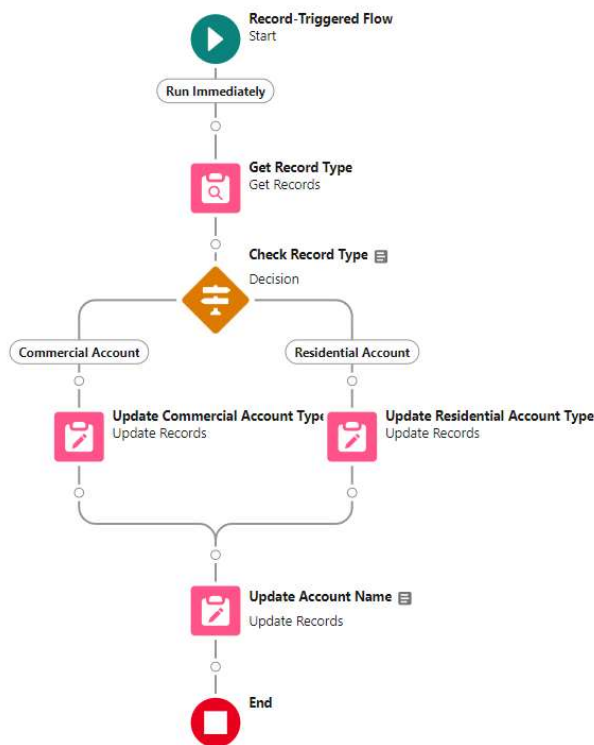


Figure 6 Append Account Name Flow

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.

MasterSeals Exteriors

HomeContact Us

Contact Us

First and last name

Email

Phone

Property Type

--None--

Company (if applicable)

Street

City

Zip

Country

Type of Service Required

--None--

Description

Preferred Contact Method

--None--

Lead Source

--None--

Submit

Figure 7 MasterSeal Exteriors Contact Us Web Page

MasterSeals Exteriors

HomeContact Us

Thank you for your inquiry

We will be in touch shortly

Return Home

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.

Lead Assignment Rule

Assign Queue

Help for this Page

Add rule entries that specify the criteria used to route leads. You can reorder rule entries on this page after you create them.

Rule Detail

Rule Name

Assign Queue

Edit

Active

✓

Created By

Leo Jia, 30/01/2024, 10:07 pm

Modified By

Leo Jia, 30/01/2024, 10:09 pm

Edit

Rule Entries

NewReorder

Action	Order	Criteria	Assign To	Email
Edit Del	<input type="text" value="1"/>	Lead: Country EQUALS Australia,AUS	Australia Lead Queue	✓
Edit Del	<input type="text" value="2"/>	Lead: Country EQUALS New Zealand,NZ,NZL	New Zealand Lead Queue	✓
Edit Del	<input type="text" value="3"/>	Lead: City EQUALS Sydney,Melbourne,Gold Coast,Brisbane,Perth,Adelaide	Australia Lead Queue	✓
Edit Del	<input type="text" value="4"/>	Lead: City EQUALS Auckland,Wellington,Hamilton,Queenstown,Rotorua,Whangarei	New Zealand Lead Queue	✓

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.

Rule Entry Edit
Assign Queue

Enter the rule entry Save Cancel

Step 1: Set the order in which this rule entry will be processed Required Information

Sort Order 1

Step 2: Select the criteria for this rule entry

Run this rule if the criteria are met

Field	Operator	Value	
Lead: Country	equals	Australia_AUS	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic

Step 3: Select the user or queue to assign the Lead to

Queue Australia Lead Queue Do Not Reassign Owner

Email Template New Australian Lead Alert

If your organization uses record types, the assignment rules determine the record type when a lead is created manually or imported without a specified record type. When no assignment rules apply, the record type of the lead owner is used. When the default lead owner is a queue, the queue owner's default record type is used.

Save Cancel

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.

Web-to-Lead Auto-Response Rule
Email Lead Help for this Page

Add rule entries that specify the criteria and email template to use to respond to leads. You can reorder rule entries on this page after you create them.

Rule Detail Edit

Rule Name	Email Lead	Active
Created By Leo Jia 29/01/2024, 10:22 pm	Modified By Leo Jia 29/01/2024, 10:23 pm	<input checked="" type="checkbox"/>

Edit

Rule Entries New Reorder

Action	Order	Criteria	Sent From (Email)	Template
Edit Del	1	Lead: First Name NOT EQUAL TO null	Leo (leo.r.jia@outlook.com)	Web-to-Lead Automated Response

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	<input checked="" type="checkbox"/>
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 inquiry 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 Duplicate Rule	Lead email matches an existing contact's email	Lead	Contact Email Matching Rule	<input checked="" type="checkbox"/>	LJia	28/01/2024
Lead - Lead Email Match Duplicate Rule	Matching Lead email addresses	Lead	Lead Email Matching Rule	<input checked="" type="checkbox"/>	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.

The screenshot displays a Salesforce Lead Record Page for a lead named 'Martha Stone'. The page layout includes a top header with the lead's name and a status bar with tabs for 'Open', 'Background Research', 'Closed - Not Converted', and 'Converted'. The main content area is divided into two columns: the left column contains lead details such as Name, Title, Company, Lead Source, Industry, Lead Currency, Type of Service Required, Description of Project/Issue, Address, and Created By; the right column contains lead record type, status, email, phone, mobile, website, preferred contact method, and email. The right sidebar features a 'Upcoming & Overdue' section with a message 'No activities to show.' and a 'Related' section with a message 'We found no potential duplicates of this Lead.' and a 'Campaign History (0)' link.

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).

The screenshot shows the Salesforce formula editor interface. At the top, 'Formula Return Type' is set to 'Currency' and 'Decimal Places' is set to '2'. Below this, there is a text area for the formula. The formula entered is: `Amount - (Amount * Discount_Percentage__c) - Materials_Budget__c`. The interface includes tabs for 'Simple Formula' and 'Advanced Formula', and buttons for 'Insert Field' and 'Insert Operator'.

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.

Validation Rule Detail			<div>EditClone</div>	
Rule Name	Closed_Won_Validation	Active	✓	
Error Condition Formula	ISPICKVAL(StageName, "Closed Won") && Quote_Signed__c = false && ISBLANK(Materials_Budget__c)			
Error Message	A quote must be signed for this opportunity to be won			Error LocationTop of Page

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

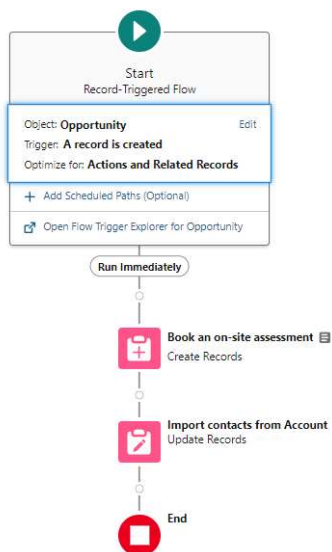


Figure 18 New Opportunity Flow

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.

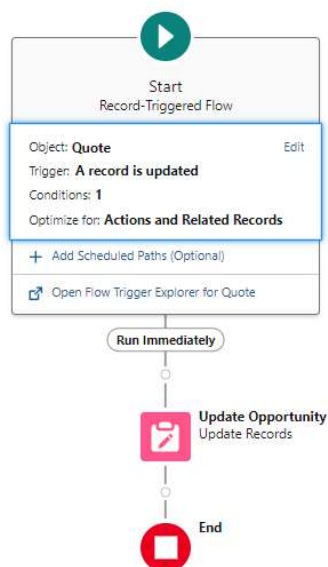


Figure 19 Quote Signed Flow

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.

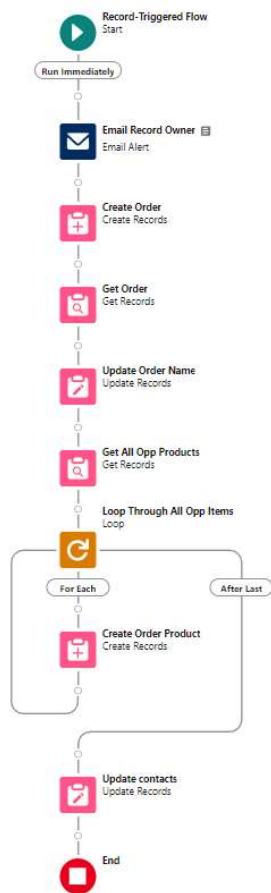


Figure 20 Opportunity Won Flow

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.

Opportunity: AUT Window Repair

Account Name: AUT Commercial Account | Close Date: 20/02/2024 | Amount: NZD 160,000.00 | Opportunity Owner: Lao Jia

Products (3+)

- Window Frame Repair: Quantity 100.00, Sales Price NZD 800.00
- Window Glass Replacement: Quantity 100.00, Sales Price NZD 800.00
- Window Hardware Replacement: Quantity 100.00, Sales Price NZD 150.00

Quotes (1)

Quote Name: Initial Quote | Expiration Date: []

Orders (1)

Order Name: First Invoice | Order Start Date: 20/02/2024 | Contract Number: []

Invoices (1)

Invoice Name: AUT Window Repair Invoice #1

Opportunity Information

Opportunity Owner: Lao Jia | Stage: Closed Won | Opportunity Name: AUT Window Repair | Account Name: AUT Commercial Account | Close Date: 20/02/2024 | Probability (100%)

Project Information

Type of Service Required: Windows | Description of Project/Issue: []

Finance

Amount: NZD 160,000.00 | Opportunity Currency: NZD - New Zealand Dollar | Materials Budget: [] | Discount Percentage: 5.63% | Expected Profit: NZD 151,000.00

Quote Signed

Quote Signed: []

Other Information

Last Source: [] | Primary Campaign Source: []

System Information

Created By: Lao Jia | Created Date: 20/02/2024 12:58 am | Last Modified By: Lao Jia | Last Modified Date: 20/02/2024 1:01 am

Action Items

Upcoming & Overview: Book an on-site assessment. You have an upcoming task. No due date.

On Site Visits (0)

Contacts (0)

Notes & Attachments (0)

Stage History (3)

Stage	Amount	Probability (%)	Expected Revenue	Close Date	Last Modified By	Last Modified
Closed Won	NZD 160,000.00	100%	NZD 160,000.00	20/02/2024	Lao Jia	20/02/2024 1:01 am
Negotiation	NZD 160,000.00	90%	NZD 144,000.00	23/02/2024	Lao Jia	20/02/2024 12:58 am
Opportunity	0.00	0%				

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.

Approval Processes
Quote: Discount Approval Process
← Back to Approval Process List

Process Definition Detail

Process Name: Discount Approval Process
Unique Name: Discount_Approval_Process
Description: Quote: Max Item Discounts NOT EQUAL TO NULL
Entry Criteria: Administrator OR Current Approver
Record Editability: Administrator OR Current Approver
Approval Assignment Email Template: Opportunity Owner
Initial Submitters: Lgo_jls
Created By: Lgo_jls 20/02/2024, 12:04 am
Modified By: Lgo_jls 22/02/2024, 12:29 am

Initial Submission Actions

Action	Type	Description
Edit Remove	Field Update	Lock the record from being edited
Edit Remove	Field Update	Approval Status Pending
Edit Remove	Field Update	Status to In Review
Edit Remove	Email Alert	Notify Approval Managers

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Step 1	Discount approval must approve discounts over 20%	Quote: Max Item Discounts GREATER THAN 20, else Approve	User:Lgo_jls	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Status to Approved
Edit Remove	Email Alert	Discount Approved
Edit Remove	Task	Present quote to client
Edit Remove	Field Update	Approval Status to Approved

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Task	Review item discounts
Edit Remove	Field Update	Approval Status to Not Approved
Edit Remove	Email Alert	Discount Rejected
Edit Remove	Field Update	Status to Rejected

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.

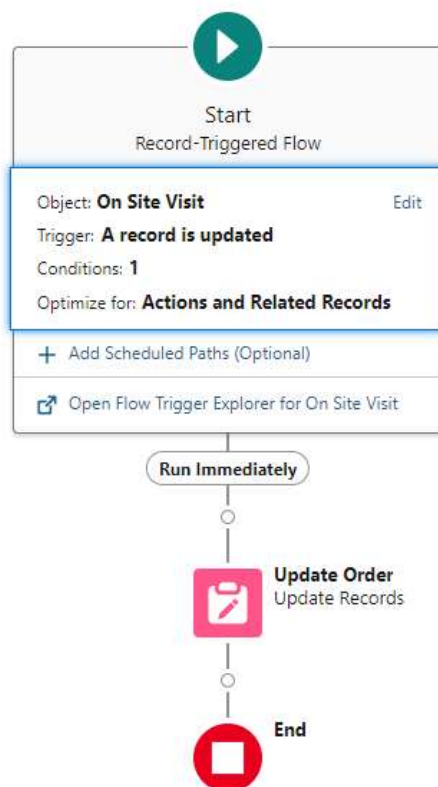


Figure 24 Final Inspection Checkbox Flow

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			
Rule Name	Account_Settled_Follow_Up	Active	<input checked="" type="checkbox"/>
Error Condition Formula	IF(ISPICKVAL(Status , "Follow-up")) ISPICKVAL(Status , "Complete"), Balance__c > 0, 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

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.

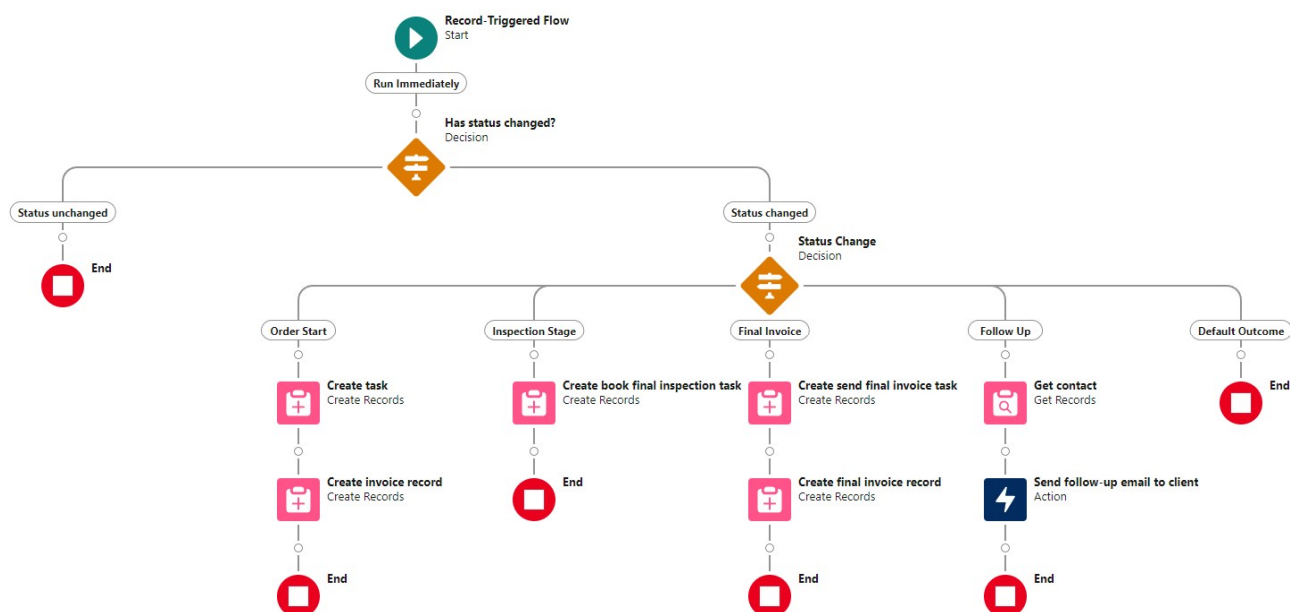


Figure 26 Order Status Flows

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.

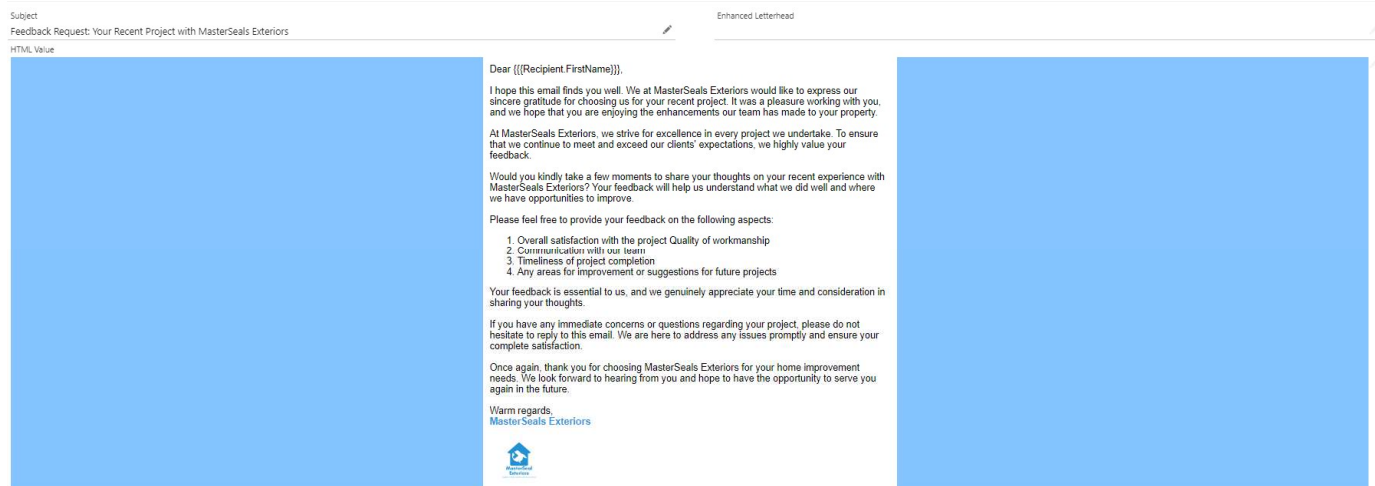


Figure 27 Feedback Request Lightning Email Template

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.

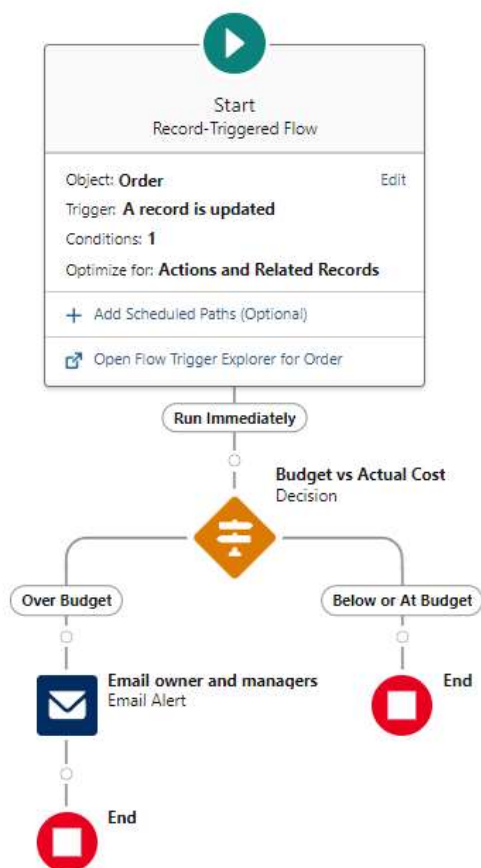


Figure 28 Order - Materials Over Budget Flow

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.

Email Alert
Order - Material Costs Over Budget

Rules Using This Email Alert | Approval Processes Using This Email Alert | Entitlement Processes Using This Email Alert

Email Alert Detail

Description	Order - Material Costs Over Budget	Email Template	Materials Over Budget
Unique Name	Order_Material_Costs_Over_Budget	Object	Order
From Email Address	Current User's email address		
Recipients	Role: Sales Manager (Residential) Role: Sales Manager (Commercial) Order Owner		
Additional Emails			
Created By	Leo Jia, 20/02/2024, 9:49 pm	Modified By	Leo Jia, 20/02/2024, 10:21 pm

Edit Delete Clone

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.

Order

Account Name: AUT Commercial Account | Order Start Date: 20/02/2024 | Status: First Invoice | Order Amount: NZD 160,000.00 | Balance

First Invoice | Setup | Implementation | Inspection | Final Invoice | Follow-up | Complete | Mark Status as Complete

Invoices (1)

AUT Window Repair Invoice #1

View All

Order Products (3+)

Window Frame Repair	Window Glass Replacement
Product Code: 100.00	Product Code: 100.00
Quantity: 100.00	Quantity: 100.00
Unit Price: NZD 800.00	Unit Price: NZD 800.00
Window Hardware Replacement	
Product Code: 100.00	
Quantity: 100.00	
Unit Price: NZD 150.00	

View All

Order History (1)

Date:	20/02/2024, 1:01 am
Field:	Created:
User:	Leo Jia
Original Value:	
New Value:	

View All

Order Information

Order Owner: Leo Jia

Opportunity: AUT Window Repair

Order Start Date: 20/02/2024

Status: First Invoice

Final Inspection Passed: ☐

Financial Information

Order Currency: NZD - New Zealand Dollar

Order Amount: NZD 160,000.00

Balance:

Budgeted Cost of Materials:

Actual Cost of Materials:

System Information

Upcoming & Overdue

Send invoice to client: ☐ You have an upcoming task.

No due date:

No past activity. Past meetings and tasks marked as done show up here.

On Site Visits (0)

Contacts (0)

Notes & Attachments (0)

Upload Files

Or drop files

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 business requirements gathered.

Product

Window Sealing and Weatherproofing

New Contact

New Opportunity

New Case

Product Code

Product Family

Window Repairs

Related

Details

Product Name

Window Sealing and Weatherproofing

Product Record Type

Commercial

Product Currency

NZD - New Zealand Dollar

Product Family

Window Repairs

Active

☒

Last Modified By

Leo Jia, 10/02/2024, 3:51 pm

Created By

Leo Jia, 10/02/2024, 3:51 pm

Product Description

\$100 - \$250 per window

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.

Order Product Custom Field
Total Cost of Materials
[Back to Order Product Fields](#)

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Total Cost of Materials
Field Name	Total_Cost_of_Materials
API Name	Total_Cost_of_Materials__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Leo Jia, 20/02/2024, 8:11 pm

Formula Options

Data Type	Formula
Decimal Places	2

Cost_of_Materials_Per_Unit__c * 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.

Custom Field Definition Detail		Edit	Set Field-Level Security	View Field Accessibility	Where is this used?
Field Information					
Field Label	Balance				
Field Name	Balance				
API Name	Balance__c				
Description					
Help Text					
Data Owner					
Field Usage					
Data Sensitivity Level					
Compliance Categorization					
Created By	Leo Jia, 19/02/2024, 8:03 pm				
Formula Options					
Data Type	Formula				
Decimal Places	2				
Total_charge__c - Amount_Paid__c					

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.

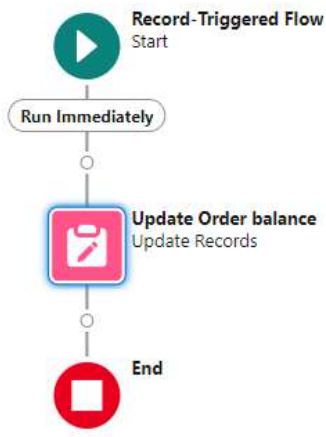



Figure 34 Invoice Balance - Order Balance Flow

Edit Formula

NewBalance 

* Data Type ⓘ

Currency ▼

Decimal Places

2

* Formula

Insert a resource... 🔍 All Functions ▼ Insert a function... 🔍 Select an Operator... ▼

IF(ISNULL(!\$Record__Prior.Amount_Paid__c), (!\$Record.Order__r.Balance__c)-(!\$Record.Amount_Paid__c), (!\$Record.Order__r.Balance__c)-
 (!\$Record.Amount_Paid__c)+(!\$Record__Prior.Amount_Paid__c))

Check Syntax

Cancel Done

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

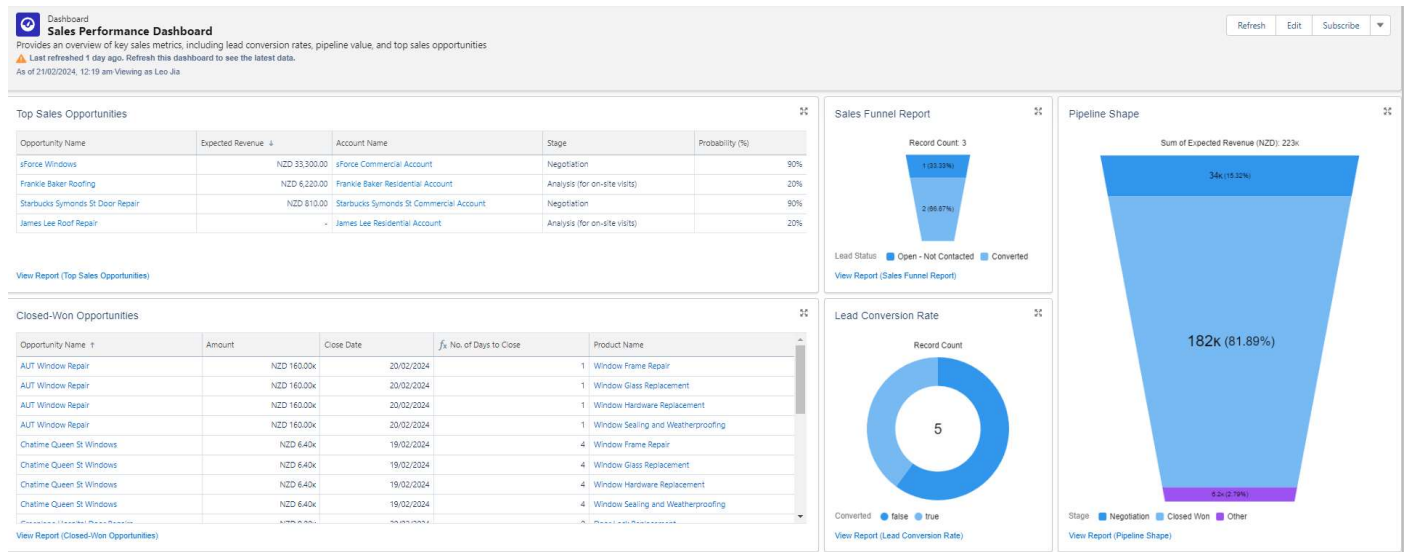


Figure 36 Sales Performance Dashboard

2. Salesforce Admin Dashboard

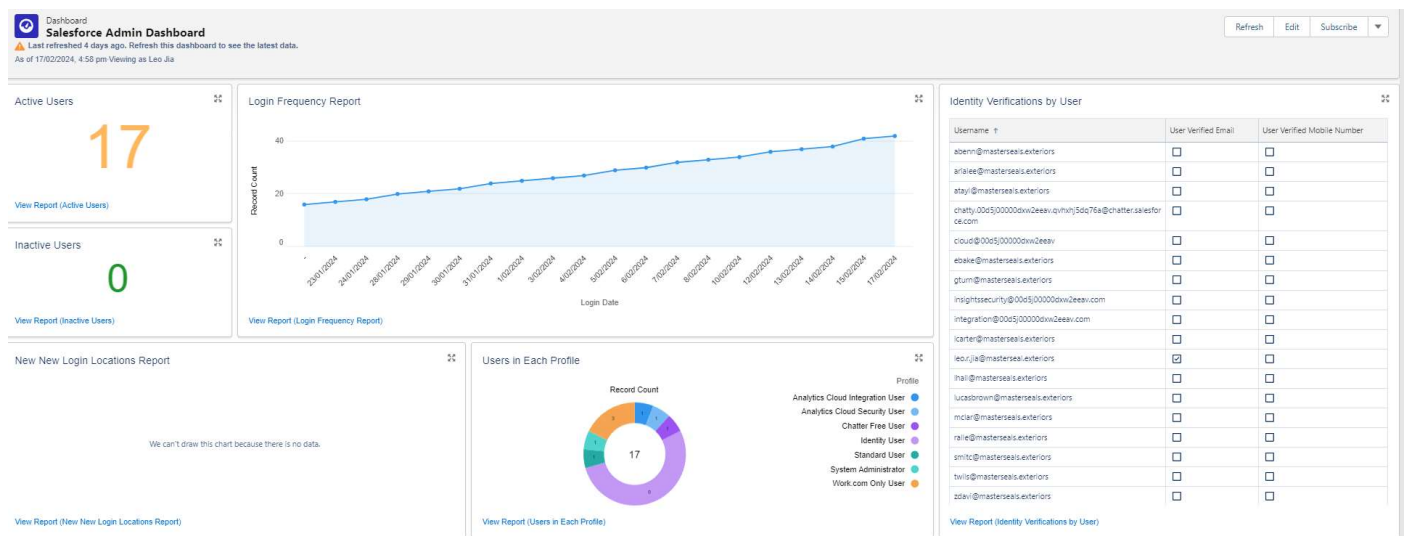


Figure 37 Salesforce Admin Dashboard

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.

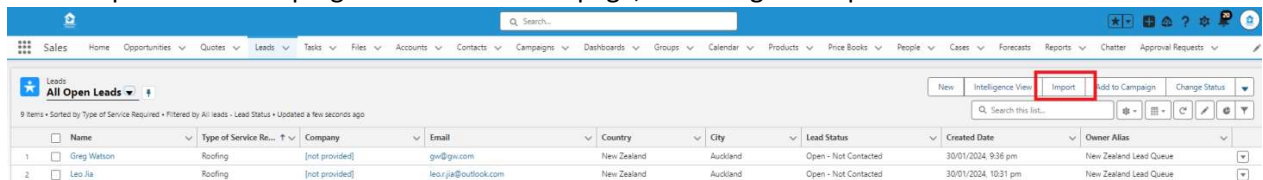


Figure 38 Leads Home Page With “Import” Button Highlighted

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

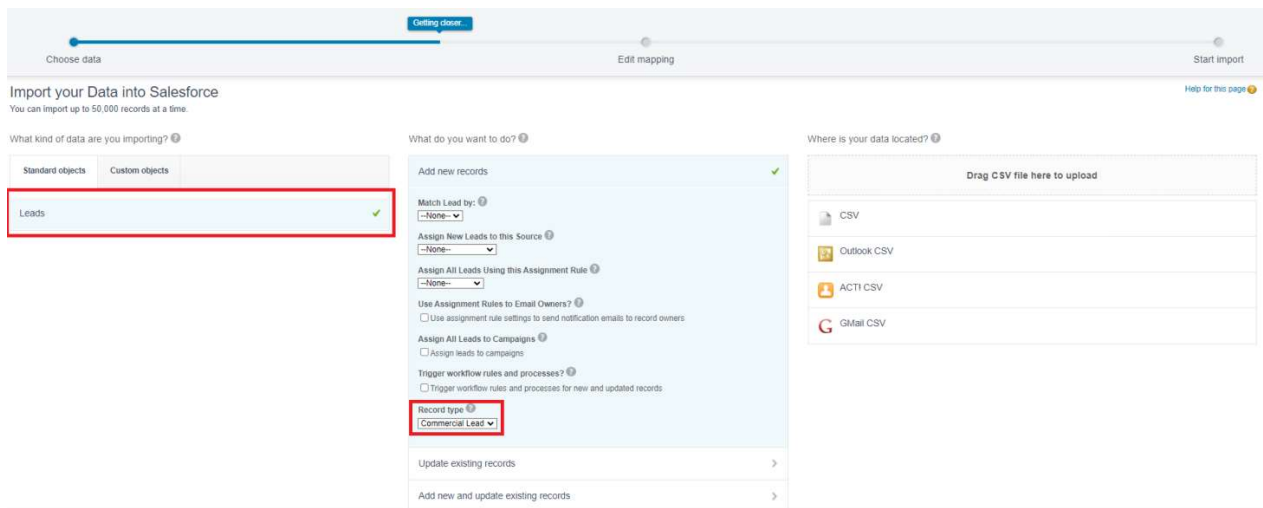


Figure 39 Import Wizard Page with “Leads” button and “Record Type” Dropdown Highlighted

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.

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Leads
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. [Help for this page](#)

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	First Name	First Name	John	Carla	Ann
Change	Last Name	Last Name	Benavides	Borgonovo	Bowles
Change	Email	email	Benavides@123Warehou	Borgonovo@ZillCorp.co	Bowles@AcmeCorp.com
Change	Phone	Phone	(415) 835-1656	(415) 835-1658	(415) 242-9238
Change	Company	Company	123 Warehousing	ZillCorp	Acme Corp
Change	City	City	Auckland	Auckland	Auckland
Change	Country	Country	NZ	NZ	NZ

Cancel Previous **Next**

Figure 40 Import Wizard Page with Relevant Table Highlighted

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

Almost done

Choose data Edit mapping Start import

Review & Start Import
Review your import information and click Start Import. [Help for this page](#)

Your selections:

- Leads ✓
- Add new records ✓
- Lead Import.csv ✓

Your import will include:

Mapped fields: **7**

Your import will not include:

Unmapped fields: **0**

Cancel Previous **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.

SETUP

Bulk Data Load Jobs

Bulk Data Load Job

7505j00000L7kGh

View the details of a bulk data load job

• [Back to List: Bulk Data Load Jobs](#)

Help for this Page

Bulk Data Load Job Detail

Reload

Job ID	7505j00000L7kGh	Job Type	Bulk V1	Status	Closed
Submitted By	Leo Jia	Operation	Insert	Total Processing Time (min)	863
Start Time	22/02/2024, 7:42 pm NZST	Queued Batches	0	API Active Processing Time (min)	710
End Time	22/02/2024, 7:42 pm NZST	In Progress Batches	0	Apex Processing Time (min)	233
Time to Complete (h:m:ss)	00:01	Completed Batches	1	Failed Batches	0
Object	Lead	Records Processed	44	Records Failed	0
External ID Field		Retries	0		
Content Type	CSV				
Concurrency Mode	Parallel				
API Version	50.0				

Reload

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (min)	API Active Processing Time (min)	Apex Processing Time (min)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7515j000000DnZ	22/02/2024, 7:42 pm	22/02/2024, 7:42 pm	863	710	233	44	0	0		Completed

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.

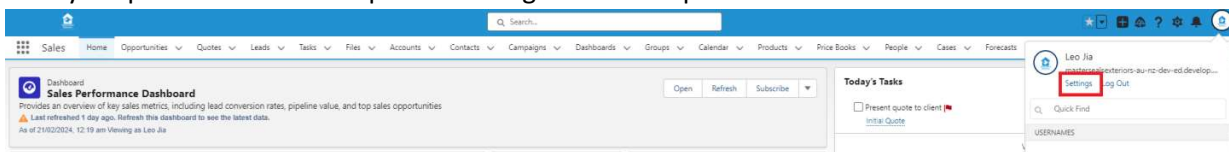


Figure 43 Salesforce Home Page with Profile Dropdown and "Settings" Button Highlighted

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

- Calendar & Reminders
- Activity Reminders**

Activity Reminders

Reminder Settings

- ☒ Show task reminders in Lightning Experience
- ☒ Set default task and all-day event reminders to: 8:00 am
- ☒ Show event reminders in Lightning Experience
- ☒ Set default event reminders to: 15 minutes

Email Settings

- ☒ Email me when someone assigns me a task

Cancel
Save

Figure 44 Activity Reminders Settings Page

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

Chatter Email Settings

Chatter can email you when someone follows you, posts to your profile or groups, and more. You can also receive daily or weekly digests with posts and comments from your personal feed and groups.

General

Receive emails ☒ (1)

Personal

Email me when someone:

- Follows: ☒
- Follows me: ☒
- Posts or Likes: ☒
- Posts on my profile: ☒
- Shares a post I made (Salesforce Classic only): ☒
- Likes or upvotes my post or comment: ☒
- Comments: ☒
- Comments on my posts: ☒
- Comments on a post on my profile: ☒
- Comments after me: ☒
- Comments on an item I bookmarked: ☒
- Comments on an item I like: ☒
- Mentions, Messages, or Endorsements: ☒
- Mentions me in a post: ☒
- Mentions me in a comment: ☒
- Sends me a message: ☒
- Endorses me on a topic: ☒

Set frequency for personal digest: (1)

Daily ☒ Weekly ☐ Never ☐

Groups

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

Setup

Quick Find: user

Users

All Users

On this page you can create, view, and manage users. To get more licenses, use the Your Account app. [Learn More](#)

View: All Users | Edit | Create New User

New User | Reset Password(s) | Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Alan, Rachel	alan	alan@masterseal.exteriors	Sales Manager / Commercial	✓	Identify User
<input type="checkbox"/> Edit	Baker, Emma	ebaker	ebaker@masterseal.exteriors	Accountant	✓	Identify User
<input type="checkbox"/> Edit	Barnett, Adam	abarnett	abarnett@masterseal.exteriors	Technician	✓	Identify User
<input type="checkbox"/> Edit	Brown, Lucas	lbrown	lucabrown@masterseal.exteriors	CEO	✓	Standard User
<input type="checkbox"/> Edit	Carter, Lily	lily	lily@masterseal.exteriors	CS Rep	✓	Work.com Only User
<input type="checkbox"/> Edit	Chatter, Robert	Robert	robert@masterseal.exteriors	Chatter	✓	Chatter Free User
<input type="checkbox"/> Edit	Clark, Michael	mic	mic@masterseal.exteriors	Technician	✓	Identify User
<input type="checkbox"/> Edit	Clark, Zoe	zclark	zoe@masterseal.exteriors	Technician	✓	Identify User
<input type="checkbox"/> Edit	Clark, John	jclark	john@masterseal.exteriors	Sales Manager / Commercial	✓	Identify User
<input type="checkbox"/> Edit	Clark, Lisa	lisa	lisa@masterseal.exteriors	System Administrator	✓	System Administrator
<input type="checkbox"/> Edit	Clark, Alex	alex	alex@masterseal.exteriors	CEO	✓	Work.com Only User
<input type="checkbox"/> Edit	Clark, Sophia	sophia	sophia@masterseal.exteriors	CEO	✓	Work.com Only User
<input type="checkbox"/> Edit	Clark, David	david	david@masterseal.exteriors	IT Support	✓	Identify User
<input type="checkbox"/> Edit	Clark, Grace	grace	grace@masterseal.exteriors	Technician	✓	Identify User
<input type="checkbox"/> Edit	Clark, Isaac	isaac	isaac@masterseal.exteriors	Technician	✓	Identify User
<input type="checkbox"/> Edit	Clark, Security	security	security@masterseal.exteriors	System Administrator	✓	System Administrator
<input type="checkbox"/> Edit	Clark, Thomas	thomas	thomas@masterseal.exteriors	Technician	✓	Identify User

Show me fewer records per list page

New User | Reset Password(s) | Add Multiple Users

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”.

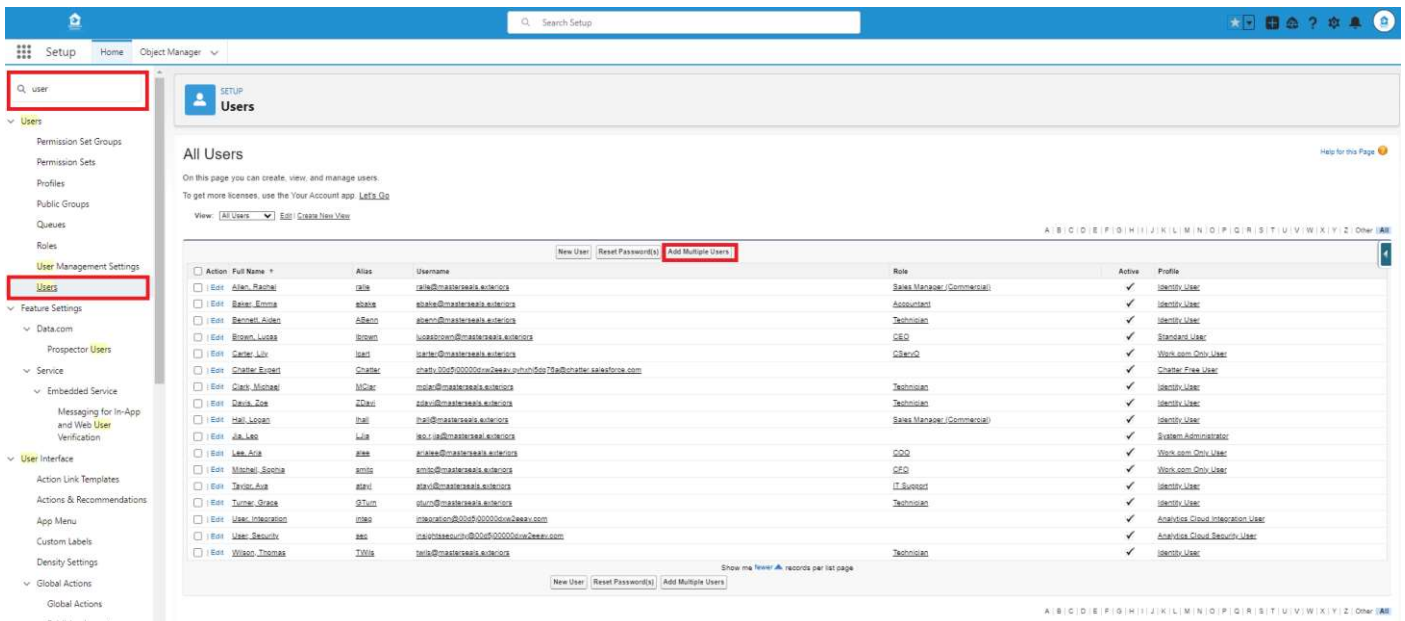


Figure 47 User Setup Page with "Add Multiple Users" Button Selected

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

Users
Add Multiple Users

Number of available Identity user licenses: 101
 Number of available Partner App Subscription user licenses: 2
 Number of available Salesforce Integration user licenses: 1
 Number of available Force.com - Free user licenses: 2
 Number of available Salesforce Platform user licenses: 3
 Number of available Force.com - App Subscription user licenses: 2
 Number of available Chatter External user licenses: 500
 Number of available Chatter Free user licenses: 4999
 Number of available XOrg Proxy User user licenses: 2

Add Users

User License:

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.

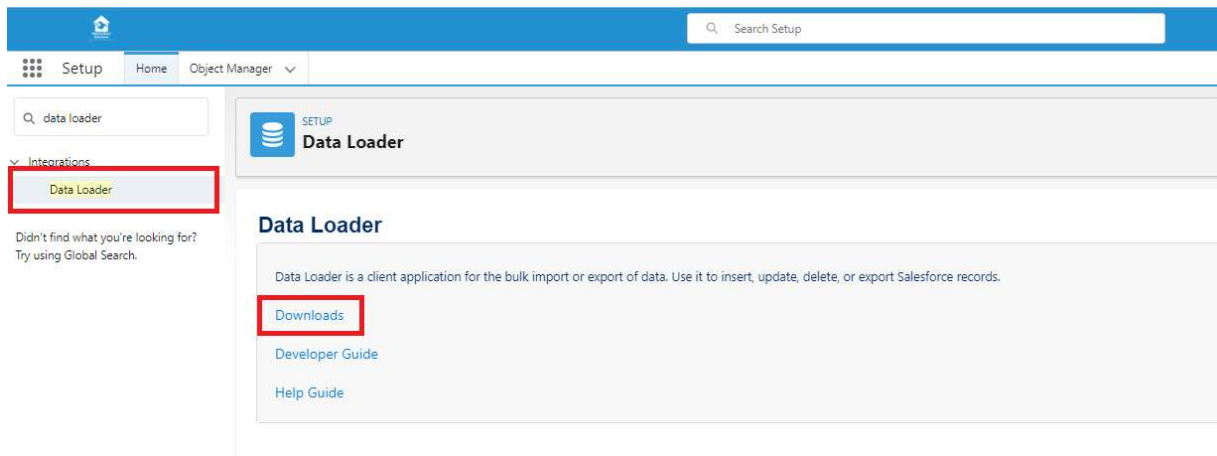


Figure 49 Data Loader Setup Page

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

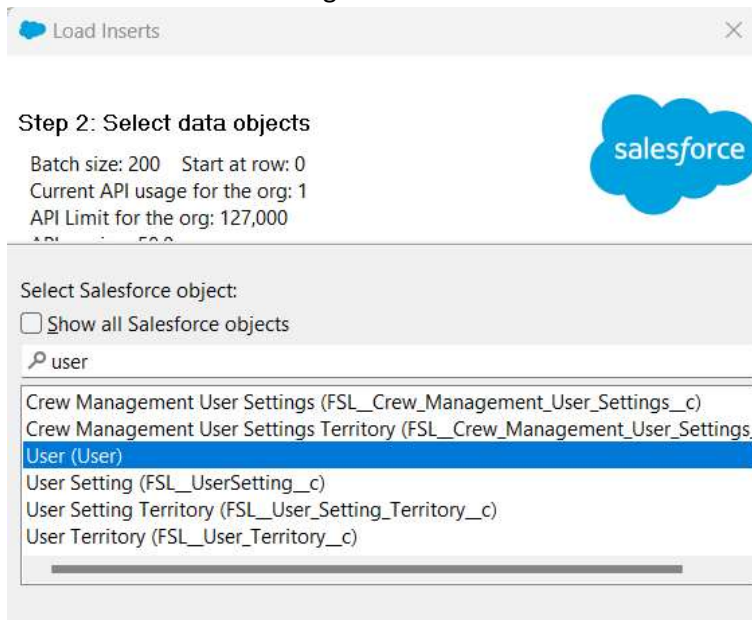


Figure 50 Data Loader Select Data Objects

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.

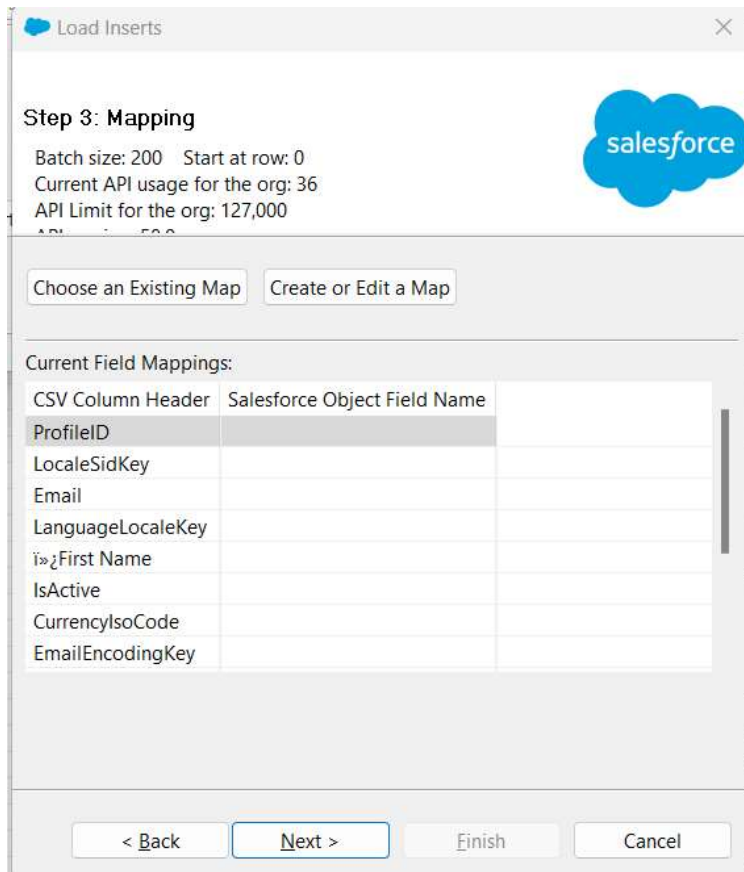


Figure 51 Data Loader Mapping

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.

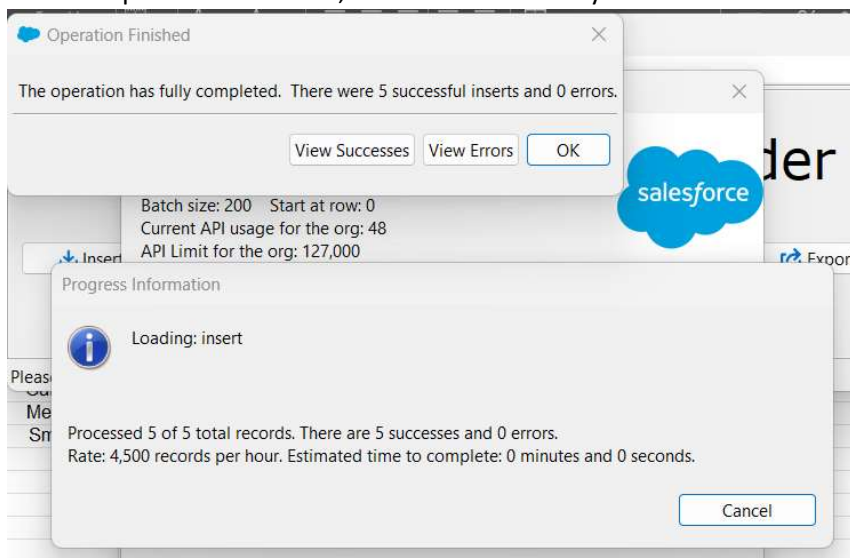


Figure 52 Data Loader Operation Popups

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)"

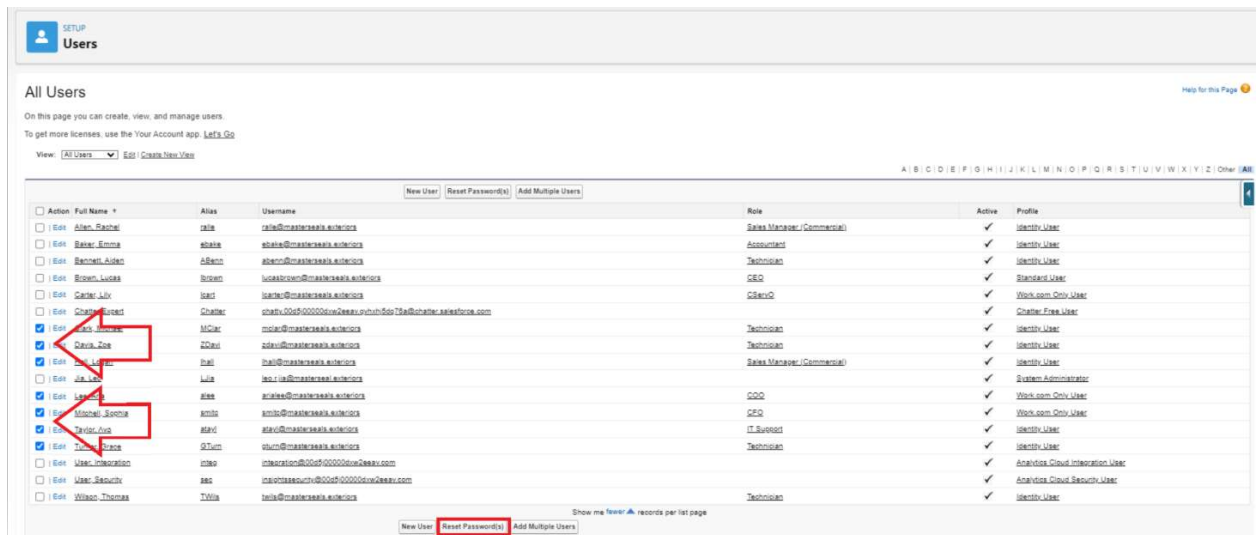


Figure 53 Users Setup Page with "Reset Password(s)" Button Highlighted

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.