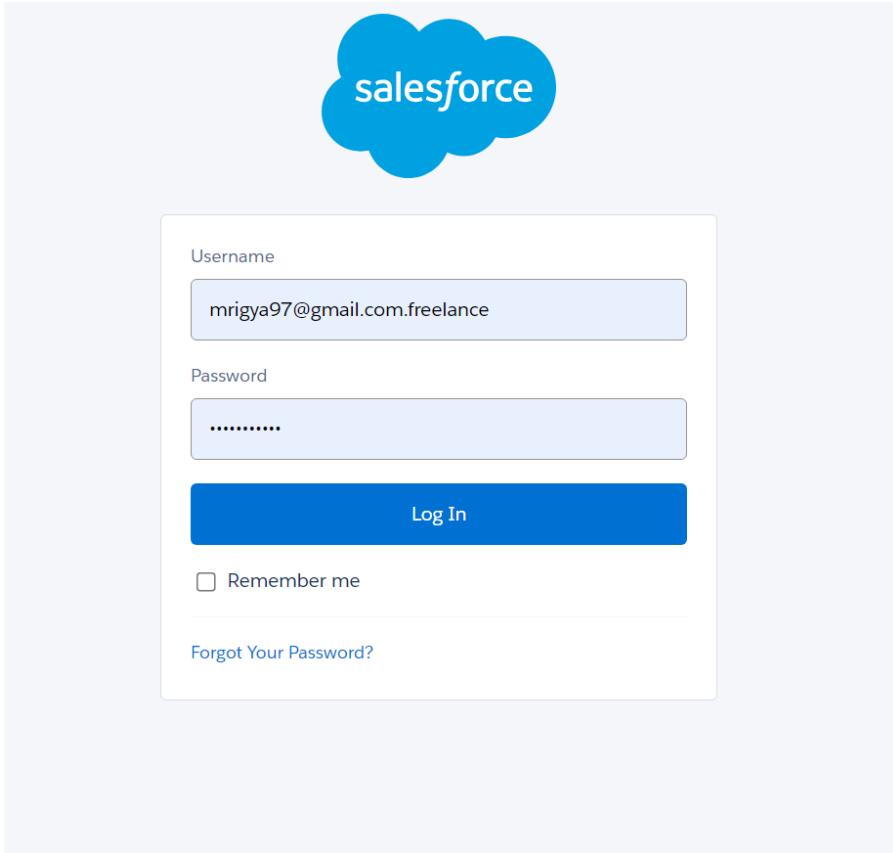


First early steps

So firstly, Salesforce Developer Org account is used to login



This is the company information which has been setup

Company Information		Help for this Page			
Tech Innovators Inc					
The organization's profile is below.					
User Licenses [10+] Permission Set Licenses [10+] Feature Licenses [11] Usage-based Entitlements [10+]					
Organization Detail		Edit	Deactivate Org		
Organization Name	Tech Innovators Inc	Phone			
Primary Contact	Mrigya Sharma	Fax			
Division		Default Locale	English (United Kingdom)		
Address	22B Baker Street London GB	Default Language	English		
Fiscal Year Starts In	January	Default Time Zone	(GMT+01:00) British Summer Time (Europe/London)		
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United Kingdom) - GBP		
Enable Data Translation	<input type="checkbox"/>	Used Data Space	434 KB (8%) [View]		
Newsletter	<input type="checkbox"/>	Used File Space	31 KB (0%) [View]		
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	4 (15,000 max)		
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)		
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)		
		Salesforce.com Organization ID	00DWS000000Vksz		

The role has been setup to the employees of the company

Collapse All Expand All	
Tech Innovators Inc	
	Add Role
Admin	Edit Del Assign
	Add Role
CFO	Edit Del Assign
	Add Role
COO	Edit Del Assign
	Add Role
Sales Manager	Edit Del Assign
	Add Role
Marketing Specialist	Edit Del Assign
	Add Role
Sales Rep	Edit Del Assign
	Add Role
Support Agent	Edit Del Assign
	Add Role
SVP, Customer Service & Support	Edit Del Assign
	Add Role
SVP, Human Resources	Edit Del Assign
	Add Role
SVP, Sales & Marketing	Edit Del Assign
	Add Role

A Custom Field of Annual Revenue has been created under the Account Object Manager

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Revenue	AnnualRevenue	Currency(18, 0)		

A Custom Field of Lead Source has been created under the Lead Object Manager

The screenshot shows the Salesforce Setup interface for the Lead object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and shows a single item: 'Lead source'. The table details the field: Field Label is 'Lead Source', Field Name is 'LeadSource', Data Type is 'Picklist', and Controlling Field is also 'Lead Source'. There is a 'Map Lead Fields' button at the top right of the table.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Lead Source	LeadSource	Picklist		

A Custom Field of Estimated Revenue and Probability has been created under the Opportunity Object Manager

The screenshot shows the Salesforce Setup interface for the Opportunity object. The left sidebar lists various configuration options. The main content area is titled 'Fields & Relationships' and shows a single item: 'Esti'. The table details the field: Field Label is 'Estimated Revenue', Field Name is 'Estimated_Revenue__c', and Data Type is 'Currency(7, 2)'. There is a 'Set History Tracking' button at the top right of the table.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Estimated Revenue	Estimated_Revenue__c	Currency(7, 2)		

The screenshot shows the Salesforce Object Manager interface for the Opportunity object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and shows one item: 'prob'. A table details the field: Field Label is 'Probability (%)', Field Name is 'Probability', Data Type is 'Percent(3, 0)', and it is indexed.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Probability (%)	Probability	Percent(3, 0)		

There has been no big significant change in page layouts.

For the database, please refer to the pdf File of Accounts, Lead, Opportunities before the CRUD function has been uploaded to github folder.

The two types of lead records have been created

The screenshot shows the Salesforce Object Manager interface for the Lead object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Record Types' and shows two items: 'Trade Show Lead' and 'Web Lead'. A table details the record types: Record Type Label, Description, Active status, and Modified By (Mrigya Sharma, 14/08/2024, 08:45).

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Trade Show Lead		✓	Mrigya Sharma, 14/08/2024, 08:45
Web Lead		✓	Mrigya Sharma, 14/08/2024, 08:45

The two types of opportunities records has been created.

The screenshot shows the Salesforce Object Manager interface for the 'Opportunity' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc., with 'Record Types' selected. The main content area displays a table titled 'Record Types' with two items: 'New Business' and 'Renewal'. The table includes columns for 'Record Type Label', 'Description', 'Active', and 'Modified By'. Both records were modified by 'Mrigya Sharma' on 12/08/2024 at 13:55 and 13:56 respectively.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
New Business		✓	Mrigya Sharma, 12/08/2024, 13:55
Renewal		✓	Mrigya Sharma, 12/08/2024, 13:56

Automation and Workflow Rules

1) Workflow rules: -

- Lead assignment: -

The rule has been implemented to automatically assign new leads to sales reps based on criteria like region or lead source

Workflow Rule
When a record is created

[Help for this Page](#)

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

Workflow Rule Detail		Edit	Clone	Deactivate
Rule Name	When a record is created	Object	Lead	
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria	
Description				
Rule Criteria	(Lead: Lead Source EQUALS Other) AND (Lead: City EQUALS London)			
Created By	Mrigya Sharma, 13/08/2024, 11:12	Modified By	Mrigya Sharma, 13/08/2024, 11:35	

Workflow Actions		Edit
Immediate Workflow Actions		
Type	Description	
Field Update	Assign Lead to Sales Rep	

Field Update		Help for this Page																																				
Assign Lead to Sales Rep																																						
Rules Using This Field Update [1] Approval Processes Using This Field Update [0] Entitlement Processes Using This Field Update [0]																																						
Field Update Detail																																						
<table border="1"> <thead> <tr> <th>Name</th><td>Assign Lead to Sales Rep</td><th>Edit</th><th>Delete</th></tr> </thead> <tbody> <tr> <td>Unique Name</td><td>Assign_Lead_to_Sales_Rep</td><td></td><td></td></tr> <tr> <td>Description</td><td></td><td></td><td></td></tr> <tr> <td>Object</td><td>Lead</td><td></td><td></td></tr> <tr> <td>Field to Update</td><td>Lead: Lead Owner</td><td></td><td></td></tr> <tr> <td>Field Data Type</td><td>Lookup</td><td></td><td></td></tr> <tr> <td>Re-evaluate Workflow Rules after Field Change</td><td><input checked="" type="checkbox"/></td><td></td><td></td></tr> <tr> <td>Field Value</td><td>Thomas Maguire</td><td></td><td></td></tr> <tr> <td>Notify Assignee</td><td><input checked="" type="checkbox"/></td><td></td><td></td></tr> </tbody> </table>			Name	Assign Lead to Sales Rep	Edit	Delete	Unique Name	Assign_Lead_to_Sales_Rep			Description				Object	Lead			Field to Update	Lead: Lead Owner			Field Data Type	Lookup			Re-evaluate Workflow Rules after Field Change	<input checked="" type="checkbox"/>			Field Value	Thomas Maguire			Notify Assignee	<input checked="" type="checkbox"/>		
Name	Assign Lead to Sales Rep	Edit	Delete																																			
Unique Name	Assign_Lead_to_Sales_Rep																																					
Description																																						
Object	Lead																																					
Field to Update	Lead: Lead Owner																																					
Field Data Type	Lookup																																					
Re-evaluate Workflow Rules after Field Change	<input checked="" type="checkbox"/>																																					
Field Value	Thomas Maguire																																					
Notify Assignee	<input checked="" type="checkbox"/>																																					
Edit Delete																																						
Rules Using This Field Update																																						
Action	Rule Name	Description	Object	Active																																		
Edit Del Deactivate	When a record is created		Lead	<input checked="" type="checkbox"/>																																		
Rules Using This Field Update Help			?																																			

However, the rule won't work because the email address and the person to whom it has been assigned is imaginary.

- Opportunity Stage Updates: -
The rule has been implemented to send email alerts or task reminders when opportunities move to critical stages.

Firstly, an email template has been created using custom options. The email template has been named as Final decision.

Email template name		Related entity type							
Final decision		Opportunity							
Description		Folder							
Made in Email Template Builder		Public Email Templates							
<input type="checkbox"/>									
Message Content									
Subject		Enhanced Letterhead							
Opportunity Status Update		<input type="checkbox"/>							
HTML Value		<input type="checkbox"/>							
Dear {{Recipient.FirstName}}, We wanted to inform you that the Opportunity "{{{Opportunity.Name}}}" has reached a critical stage.									
<table border="1"> <tr> <td>Stage:</td> <td>{{{Opportunity.StageName}}}</td> </tr> <tr> <td>Amount:</td> <td>{{{Opportunity.Amount}}}</td> </tr> <tr> <td>Close Date:</td> <td>{{{Opportunity.CloseDate}}}</td> </tr> </table>				Stage:	{{{Opportunity.StageName}}}	Amount:	{{{Opportunity.Amount}}}	Close Date:	{{{Opportunity.CloseDate}}}
Stage:	{{{Opportunity.StageName}}}								
Amount:	{{{Opportunity.Amount}}}								
Close Date:	{{{Opportunity.CloseDate}}}								
This Opportunity is now marked as "{{{Opportunity.StageName}}}". Please review and take any necessary actions.									
Best regards, Tech Innovators Ltd.									

Then the email alerts along with custom template have been updated. This has been named as final decision on opportunity.

The screenshot shows the Salesforce Setup interface for creating a new Email Alert. The page title is "Email Alerts". The configuration details are as follows:

- Description:** Final decision on opportunity
- Unique Name:** Final_decision_on_opportu
- Object:** Opportunity
- Email Template:** Final decision
- Protected Component:**
- Recipient Type:** User
- Recipients:**
 - Available Recipients:** User: Integration User, User: Security User
 - Selected Recipients:** User: Mrigya Sharma, User: Thomas Maguire, User: Samuel Baker, User: Mohit Patel, User: Quina Lee, User: Abdul Rashid, User: Rodrigo Lopez, Opportunity Owner
 - Action Buttons:** Add (right arrow), Remove (left arrow)

The condition has also been set

Email Alert Detail		Edit	Delete	Clone	Email Template	Final decision
Description	Final decision on opportunity				Object	Opportunity
Unique Name	Final_decision_on_opportunity					
From Email Address	Current User's email address					
Recipients	User_Mrigya Sharma User_Thomas Maguire User_Samuel Baker User_Mohit Patel User_Quina Lee User_Abdul Rashid User_Rodrigo Lopez Opportunity Owner					
Additional Emails	mrigya97@gmail.com					
Created By	Mrigya Sharma, 13/08/2024, 13:09				Modified By	Mrigya Sharma, 13/08/2024, 13:47
		Edit	Delete	Clone		

Rules Using This Email Alert					Rules Using This Email Alert Help ?
Action	Rule Name	Description	Object	Active	
Edit Del Deactivate	Send_email_alerts		Opportunity	<input checked="" type="checkbox"/>	

Approval Processes Using This Email Alert					Approval Processes Using This Email Alert Help ?
---	--	--	--	--	--

The workflow has been setup

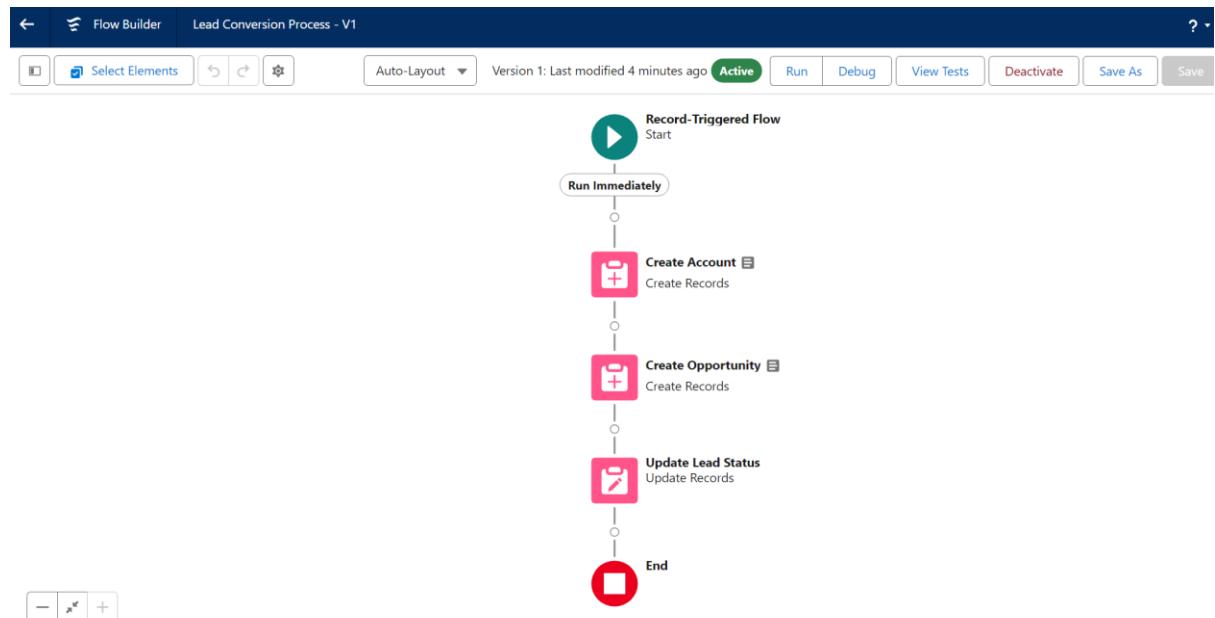
Workflow Rule Detail		Edit	Clone	Deactivate	
Rule Name	Send email alerts				Object
Active	<input checked="" type="checkbox"/>				Evaluation Criteria
Description					Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Rule Criteria	OR(ISPICKVAL(StageName, "Closed Won"), ISPICKVAL(StageName, "Closed Lost"))				
Created By	Mrigya Sharma, 13/08/2024, 13:05				Modified By
					Mrigya Sharma, 21/08/2024, 12:44
		Edit			

Workflow Actions	
Edit	
Immediate Workflow Actions	
Type	Description
Email Alert	Final decision on opportunity

However, since the company and employees are imaginary, the emails has not been sent to the people when opportunities have been sent to critical stages like Closed won or Closed Lost.

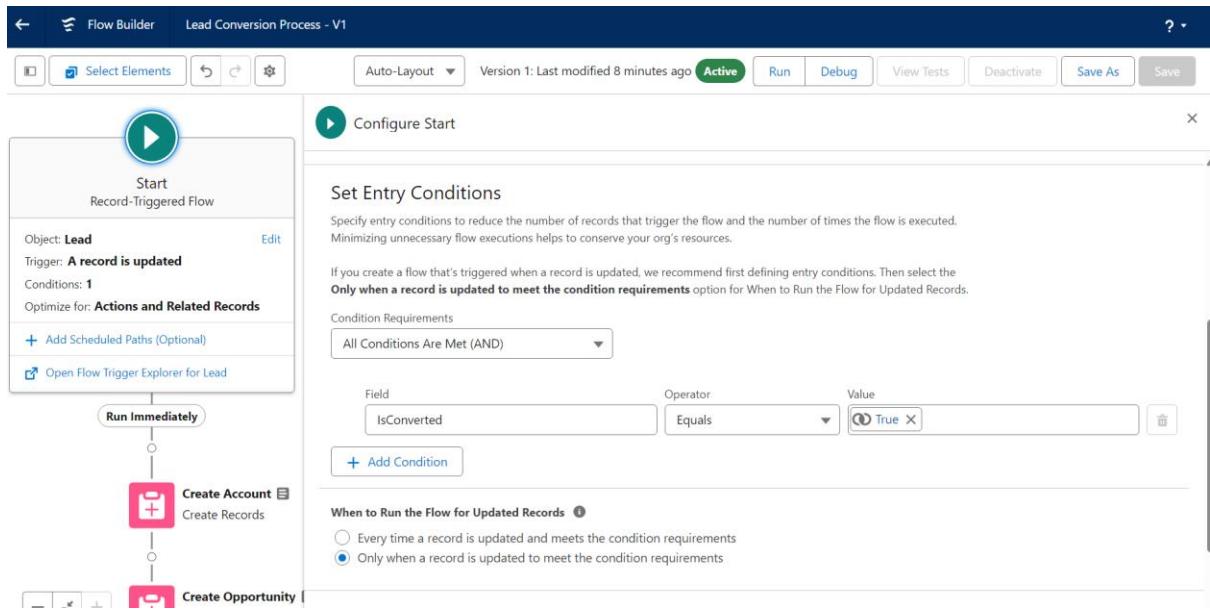
2) Flow Builder: -

- Lead Conversion Process: - This automatic workflow creates an Account and Opportunity when a Lead is converted.

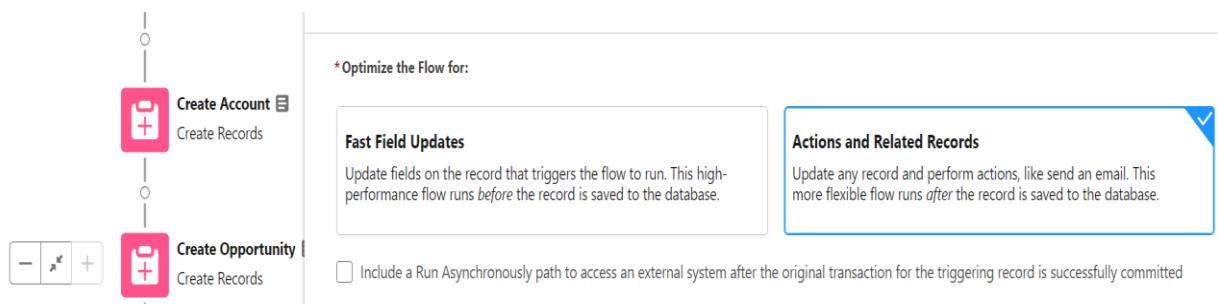


The screenshot shows the Flow Builder interface for the same flow. On the left, the "Start Record-Triggered Flow" node is selected. Its configuration details are shown: Object: Lead, Trigger: A record is updated, Conditions: 1, and Optimized for: Actions and Related Records. Below this, there are buttons for "Add Scheduled Paths (Optional)" and "Open Flow Trigger Explorer for Lead". A "Run Immediately" button is also present. To the right, a modal window titled "Configure Start" is open, showing the "Select Object" step where "Lead" is selected as the object. The modal also contains a "Configure Trigger" section with the option "Trigger the Flow When: A record is updated" selected.

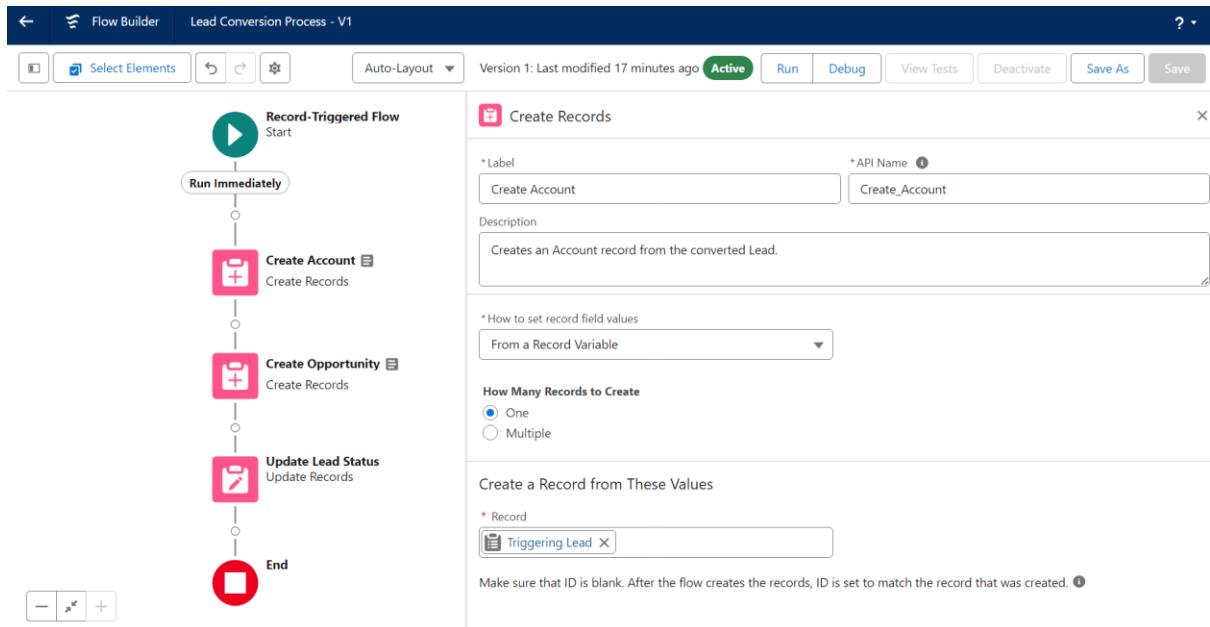
So the object has been set to Lead and the flow will trigger only when a record is updated.



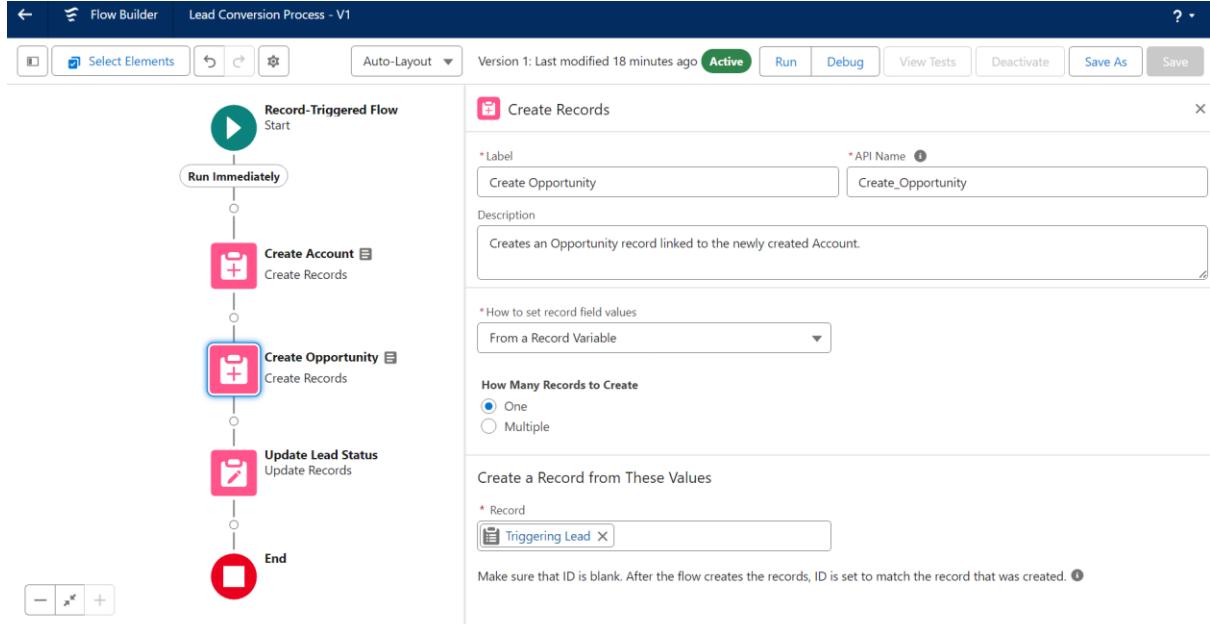
All Conditions are Met is set as a requirement where field IsConverted equals True. Flow will run only when a record is updated to meet the condition requirements.



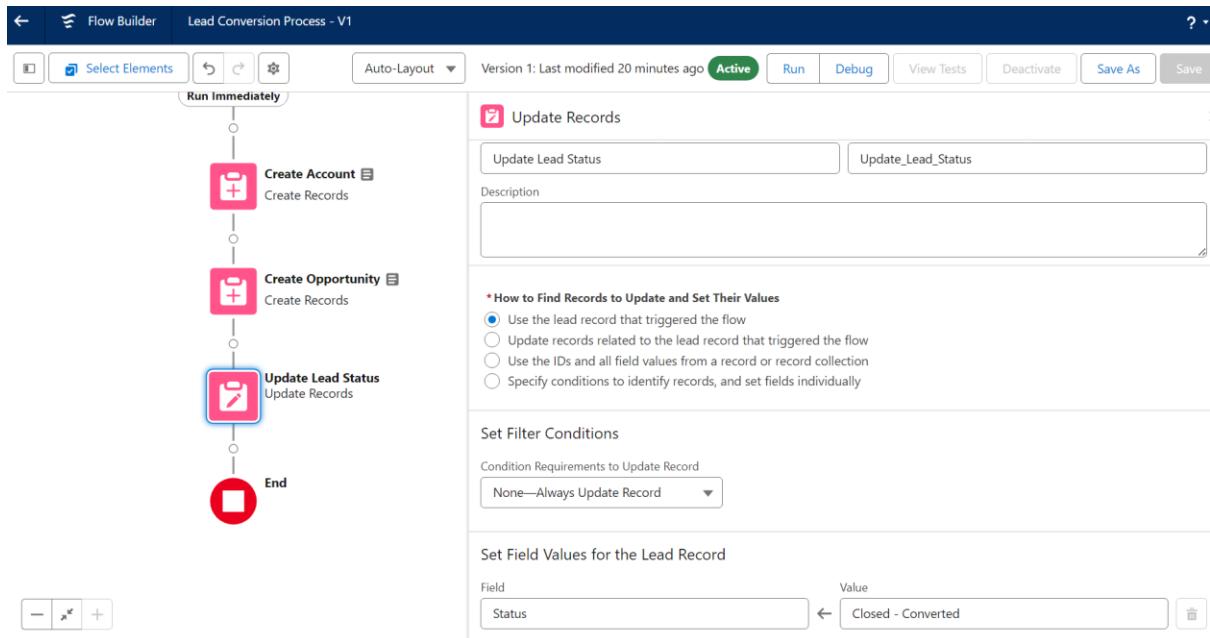
The flow is optimized for action and related records.



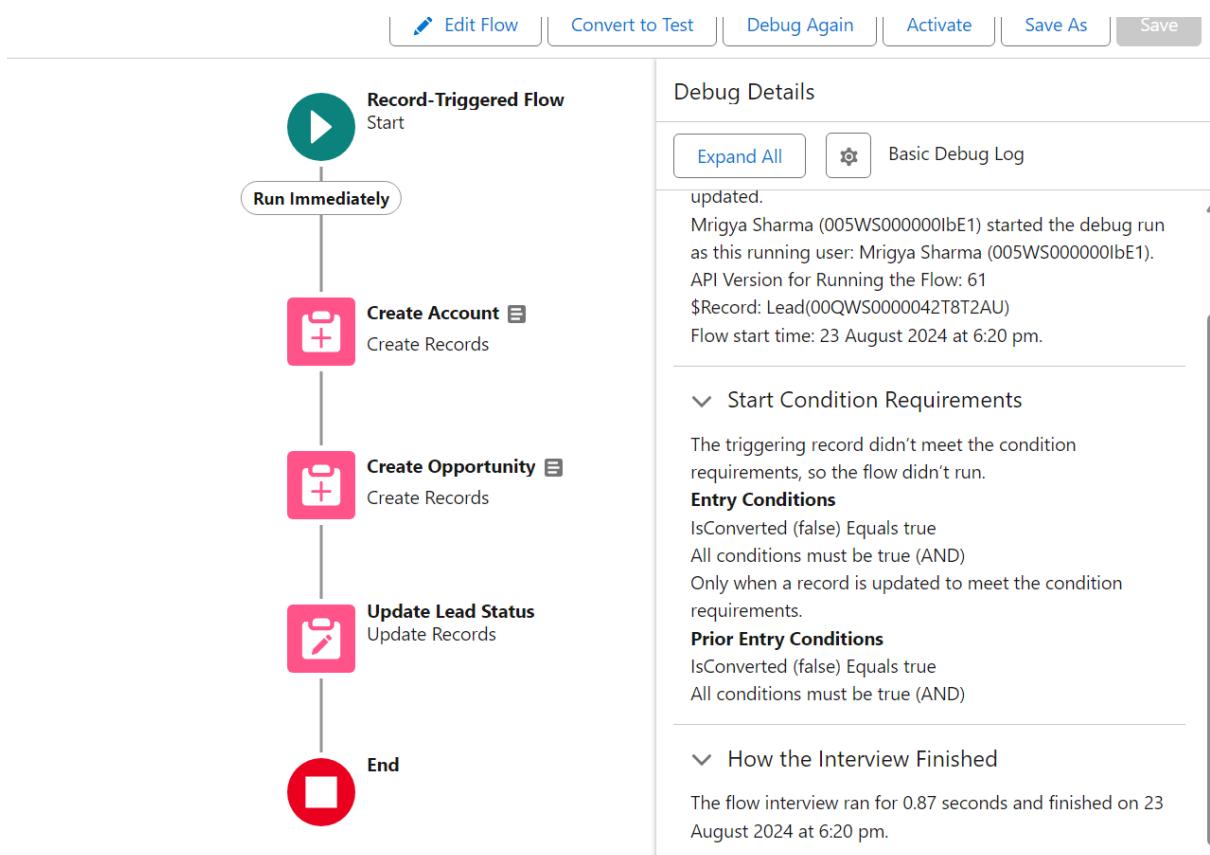
For creating an account from a lead as a first step, only one record can be created from the triggering lead.



Similarly, we do for creating an opportunity.



So, when the lead status is converted into closed – converted, this is automatically create accounts and opportunities.



After debugging there were no errors that means the flow is working.

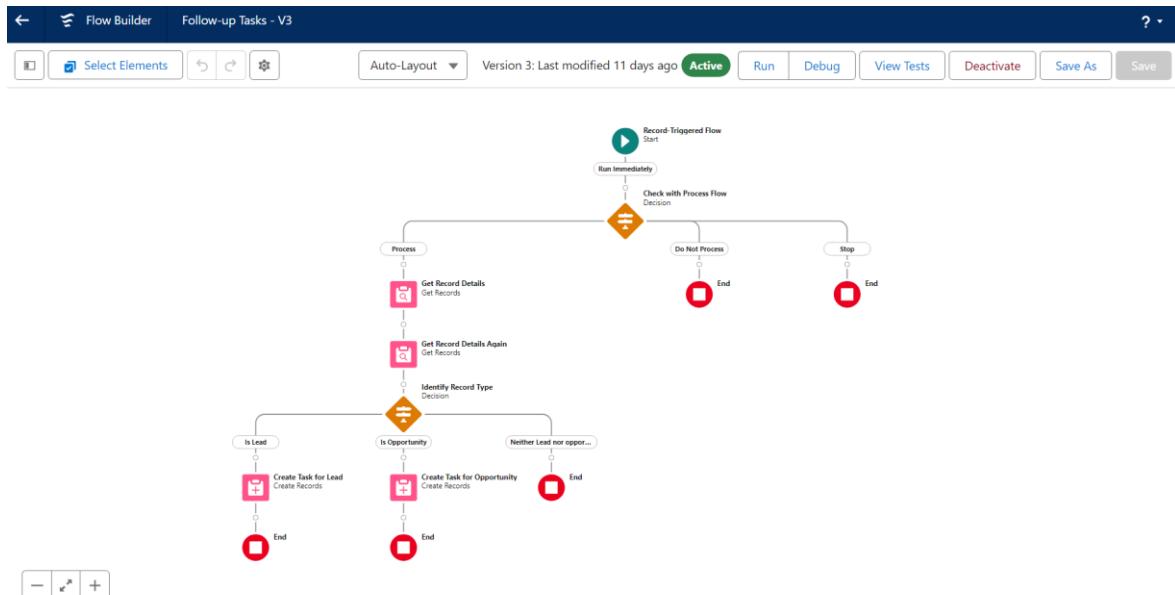
13	<input type="checkbox"/> 00QWS0000042Sh32AE	Negotiation/Review	14/08/2024	MShar	<input type="button" value="▼"/>
14	<input type="checkbox"/> 00QWS0000042S9B2AU	Qualification	14/08/2024	MShar	<input type="button" value="▼"/>
15	<input type="checkbox"/> 00QWS0000042RrR2AU	Closed Won	14/08/2024	MShar	<input type="button" value="▼"/>
16	<input type="checkbox"/> 00QWS0000042Qgs2AE	Qualification	14/08/2024	MShar	<input type="button" value="▼"/>

These are opportunities created automatically using this flow when lead status was closed converted.

Accounts		New	Import	Printable View	Assign Label	
All Accounts ▾		<input type="text"/> Search this list... <input type="button" value="X"/> <input type="button" value="grid"/> <input type="button" value="C"/> <input type="button" value="P"/> <input type="button" value="E"/> <input type="button" value="Y"/>				
1	<input type="checkbox"/> Account Name ↑	Account Site	Billing State/P...	Phone	Type	Account Owne...
1	<input type="checkbox"/> 00QWS0000042Qgs2AE				MShar	<input type="button" value="▼"/>
2	<input type="checkbox"/> 00QWS0000042RrR2AU				MShar	<input type="button" value="▼"/>
3	<input type="checkbox"/> 00QWS0000042S9B2AU				MShar	<input type="button" value="▼"/>
4	<input type="checkbox"/> 00QWS0000042Sh32AE				MShar	<input type="button" value="▼"/>

Similarly, accounts are created using this flow.

- Follow-Up Tasks: - This flow will create tasks for sales reps to follow up on high-priority leads and opportunities.



The object is Lead and the flow will trigger when the record is created or updated.

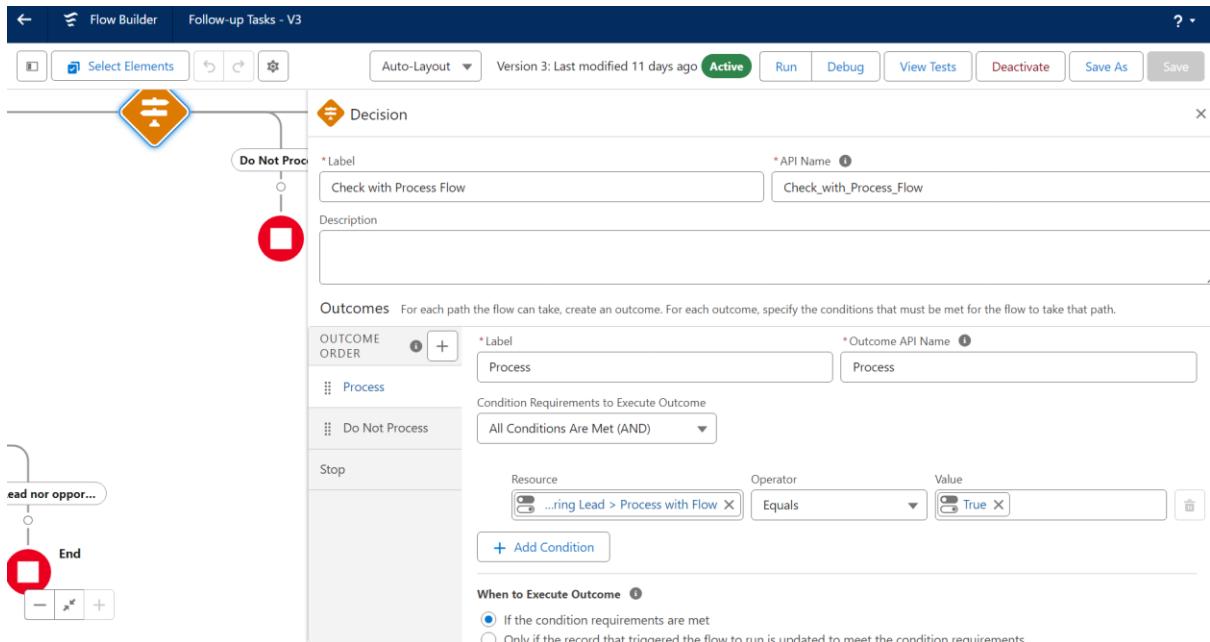
The screenshot shows the Salesforce Flow Builder interface with the title "Follow-up Tasks - V3". The flow is a "Record-Triggered Flow" starting with a "Start" element. The trigger is set to "A record is created or updated" for the "Lead" object. The flow is optimized for "Actions and Related Records". A "Run Immediately" button is present. A decision point follows, labeled "Check with Process F". The right panel displays the configuration for the "Configure Start" step, specifically the "Select Object" section where "Lead" is selected as the object.

There are no conditional requirements and the flow will be optimized for Action and Related Records

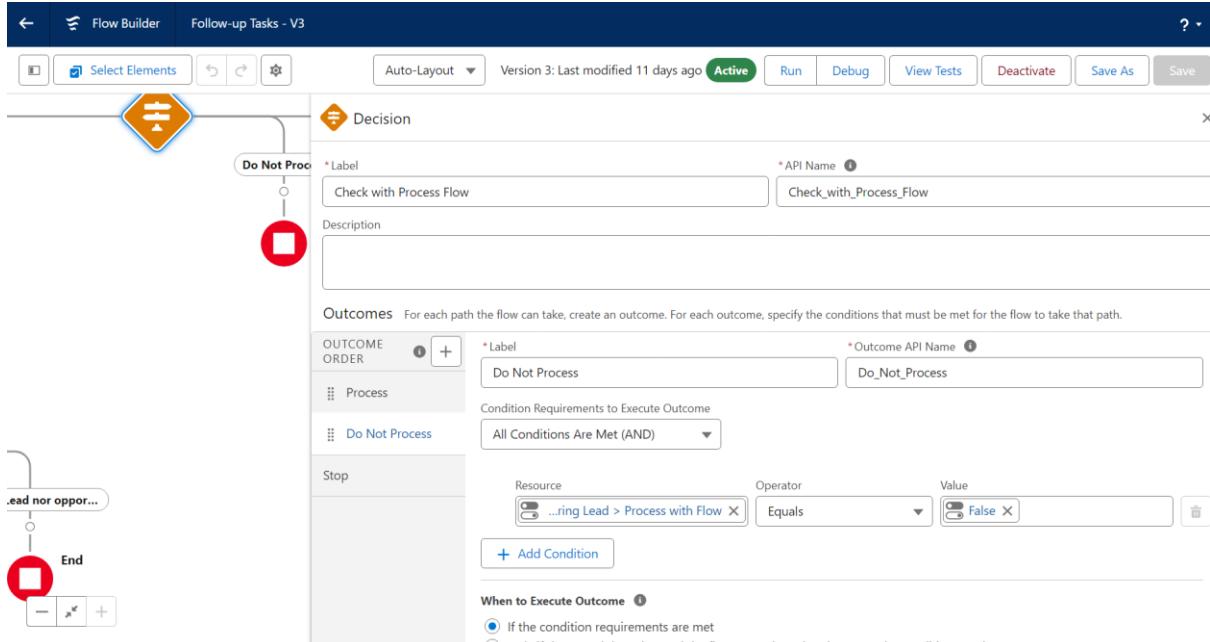
The screenshot shows the Salesforce Flow Builder interface with the title "Follow-up Tasks - V3". The flow is a "Record-Triggered Flow" starting with a "Start" element. The trigger is set to "A record is created or updated" for the "Lead" object. The flow is optimized for "Actions and Related Records". A "Run Immediately" button is present. A decision point follows, labeled "Check with Process F". The right panel displays the configuration for the "Configure Start" step, specifically the "Set Entry Conditions" section, which includes options for entry conditions and optimization settings like "Fast Field Updates" and "Actions and Related Records".

So firstly, the decision will be made whether Process with Flow of Lead is true or not.

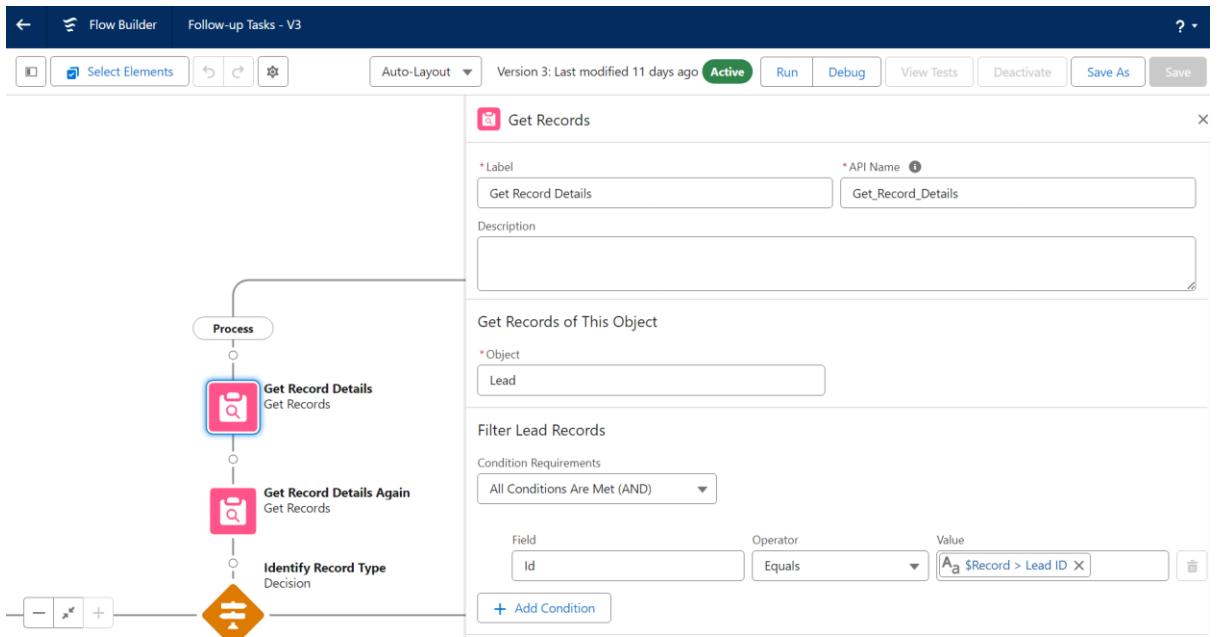
If the process with flow is true, then it will move forward



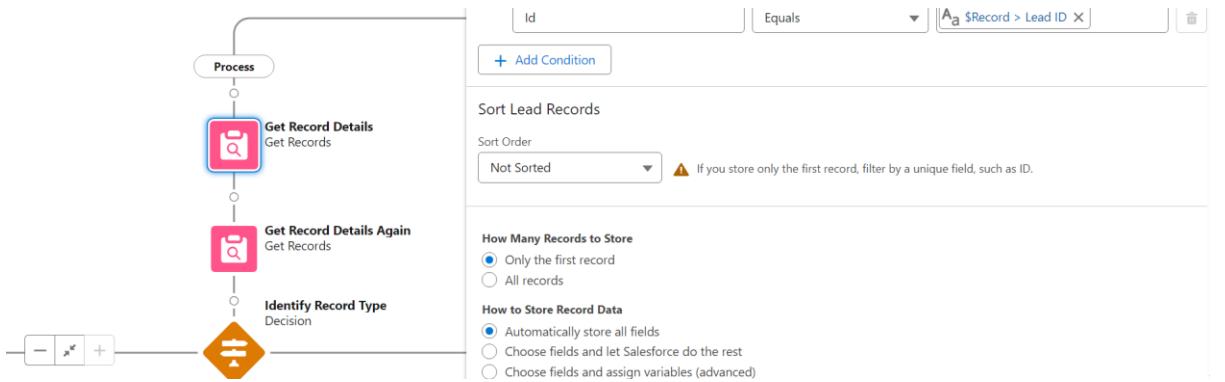
If the process with flow is false, then it will not move forward



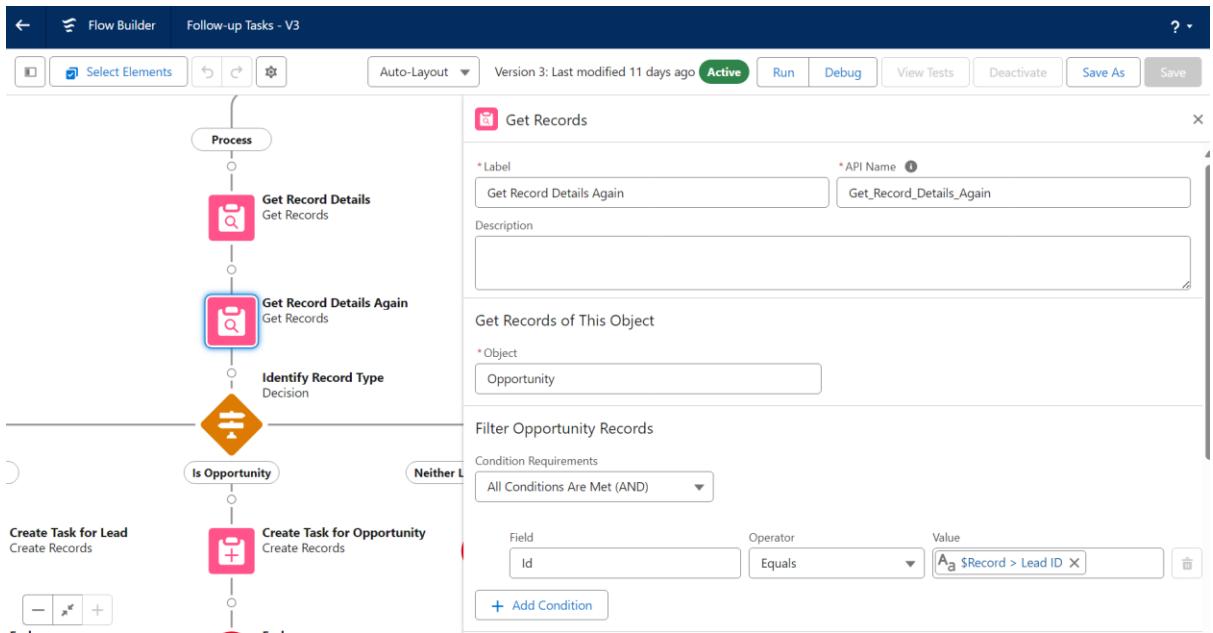
So firstly, record details will be collected for the object lead where the condition is Id is equal to Lead ID (Record ID).



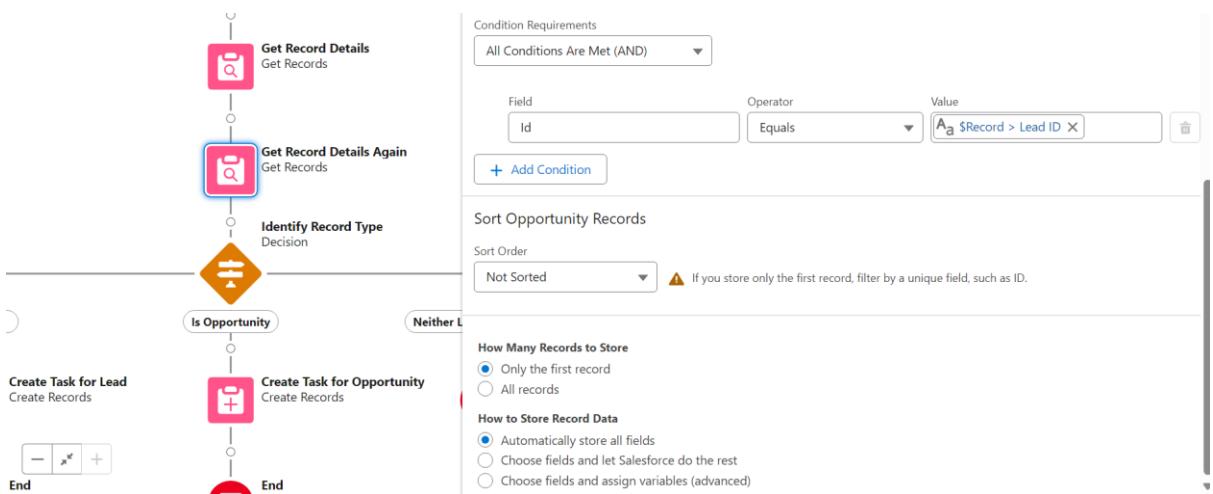
It will only store the first record, and all the fields will be stored automatically.



Again, record details will be collected for the object Opportunities where the condition is Id is equal to Lead ID (Record ID).

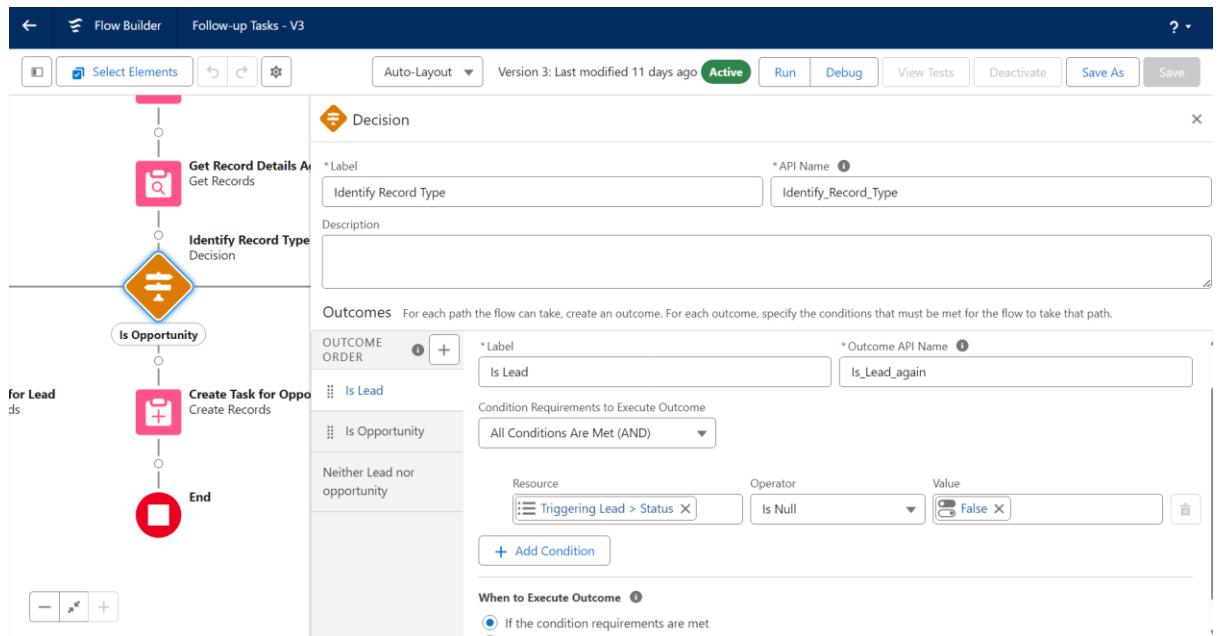


It will only store the first record, and all the fields will be stored automatically.

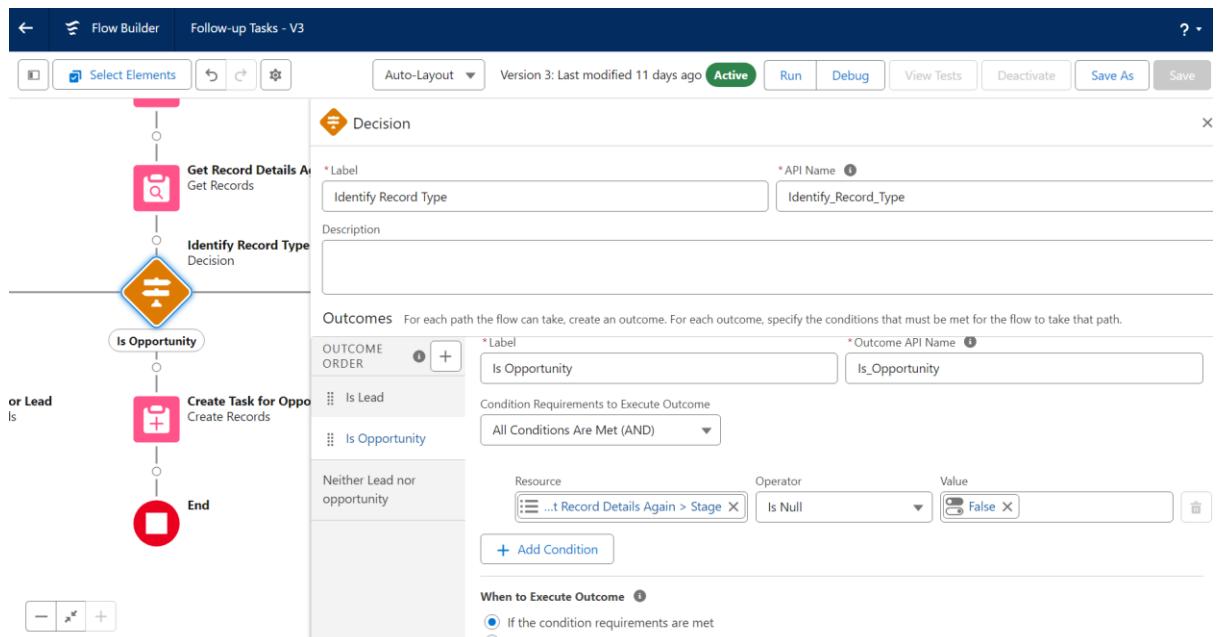


So, the decision will be made whether the record type is lead or opportunity. To check whether the record type is lead or not, condition

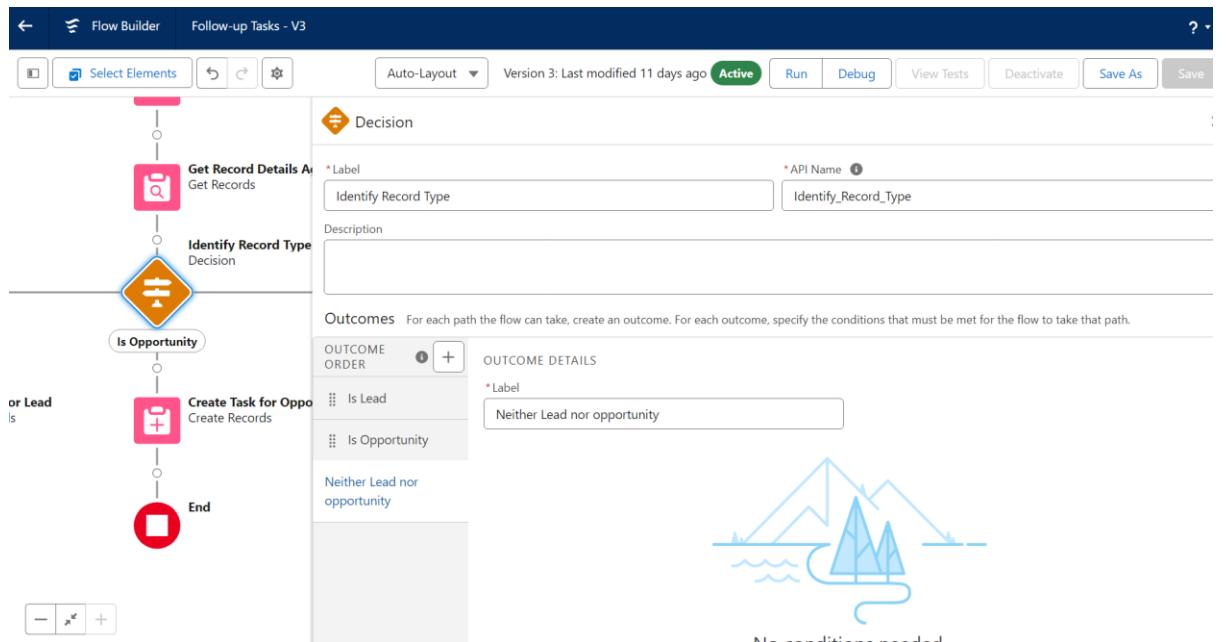
is that the status of the lead should not be null, and outcome will execute if the condition requirements are met.



To check whether the record type is opportunity or not, condition is that the opportunity stage should not be null, and outcome will execute if the condition requirements are met.

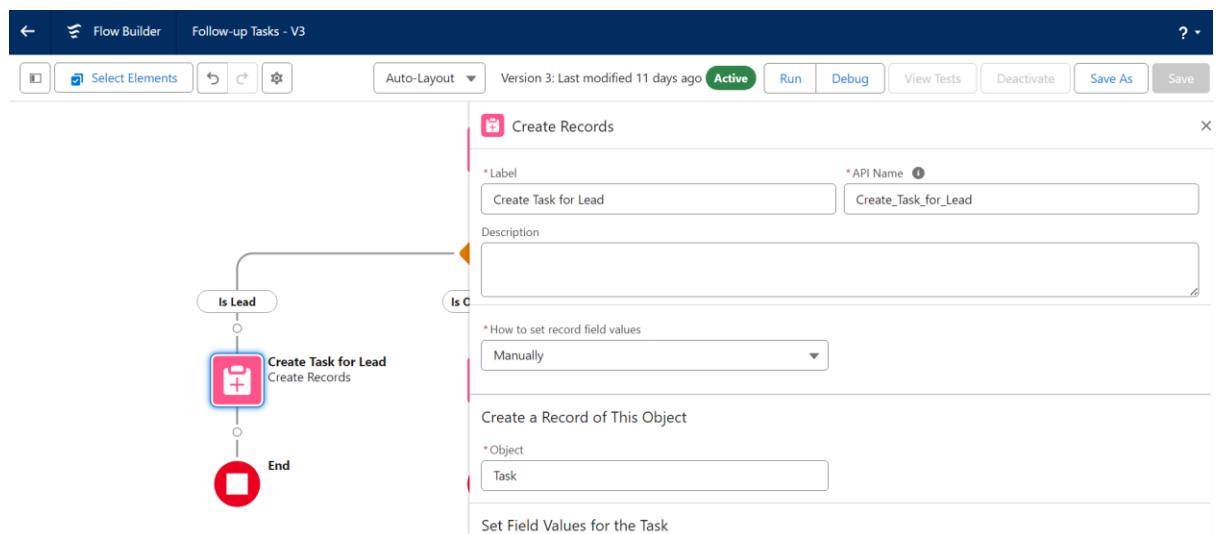


If the record type is neither lead nor opportunity, no action will be taken.



If the record type is lead i.e. lead status is not null, then the records will be created where the record field values will be set manually.

The object will be the task.



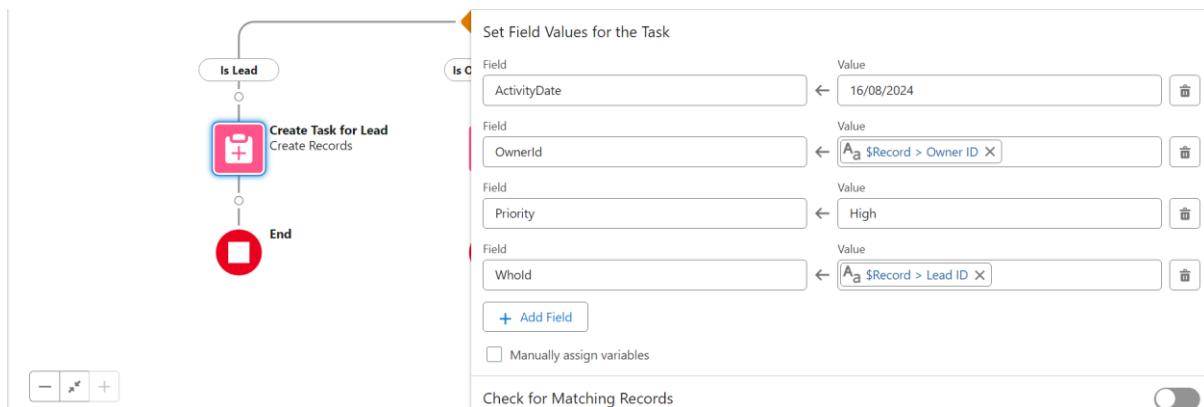
In this case, the field values need to be set manually,

Activity Date: - It should be the deadline however in this case it is 16/08/2024

Field: - Owner ID

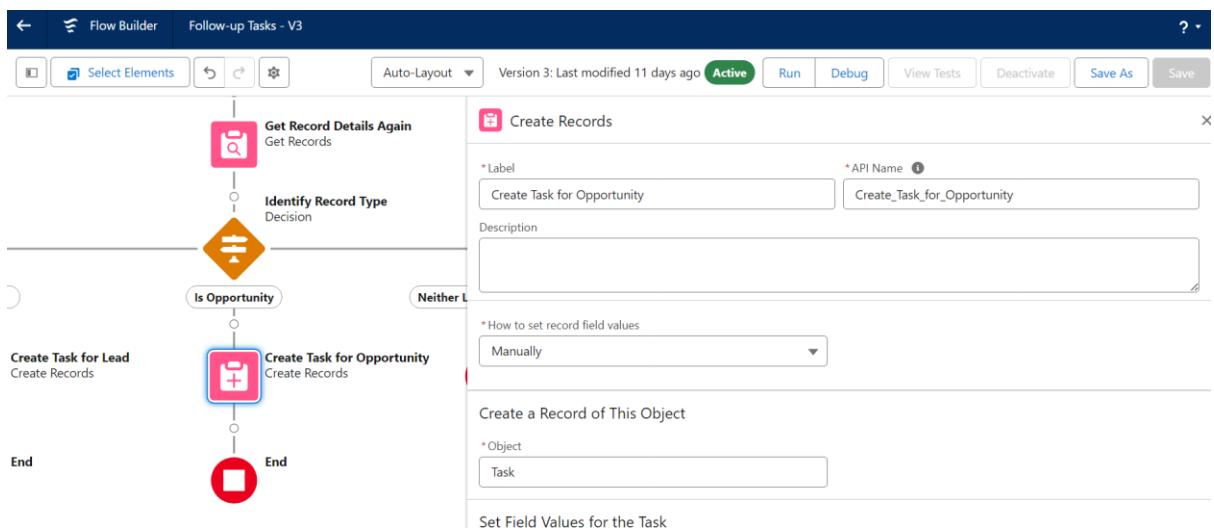
Priority: - High

Whold: - Lead ID

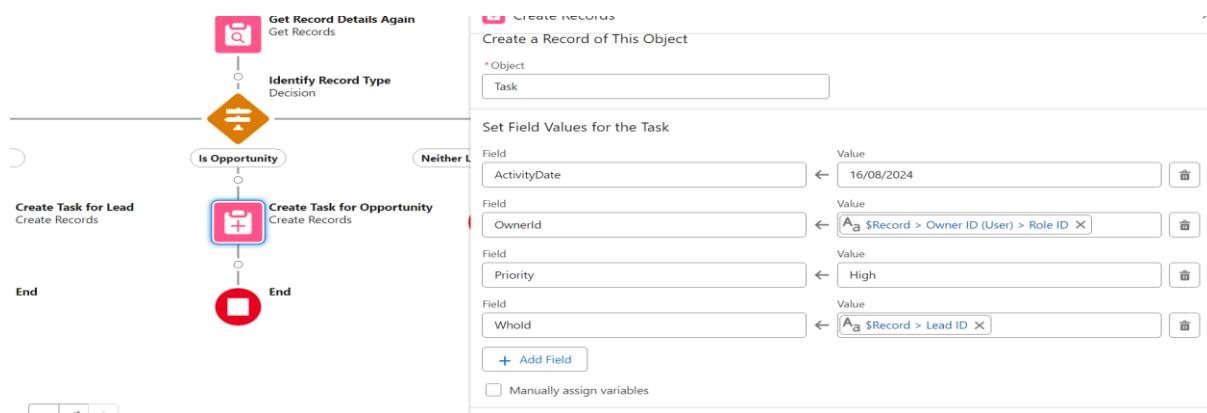


If the record type is opportunity i.e. opportunity status is not null, then the records will be created where the record field values will be set manually.

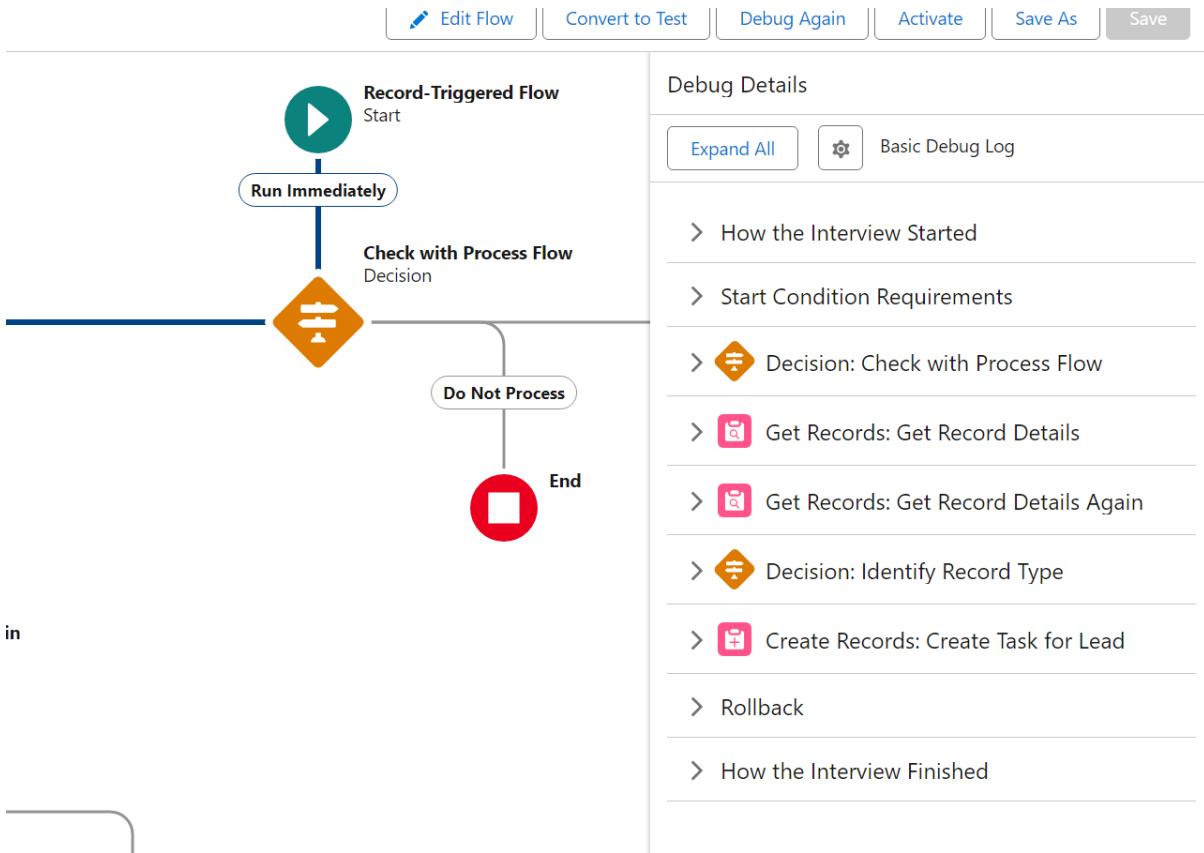
The object will be the task.



In this case, the field values need to be set manually,
 Activity Date: - It should be the deadline however in this case it is
 16/08/2024
 Field: - Owner ID
 Priority: - High
 WhatId: - Lead ID



So now the flow will be debug, where I will select the lead and check the box of Process with the flow



There are no errors, so the debug has been successfully executed.

So here for the lead, the process with flow has been checked and lead status is updated to Ready for Closure. (Ready for Closure has been created using field and relationships under Object Manager).

Lead
Mr. David Concoe

Activity **Details** Chatter

Lead Owner	Phone
Mrigya.Sharma	0746347828
Name	Mobile
Mr. David Concoe	Fax
Company	Email
Columbia Stores - Willesden	c.david@gmail.com
Title	Website
Lead Source	Lead Status
Other	Ready for Closure
Industry	Rating
Retail	No. of Employees
Annual Revenue	
Process with Flow	
<input checked="" type="checkbox"/>	
Converted_Lead_Count	

Related

- We found records for this Lead.
- Campaign History

So, the task has been created automatically to follow up

Lead
Mr. David Concoe

Activity Details Chatter

New Task Log a Call New Event Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

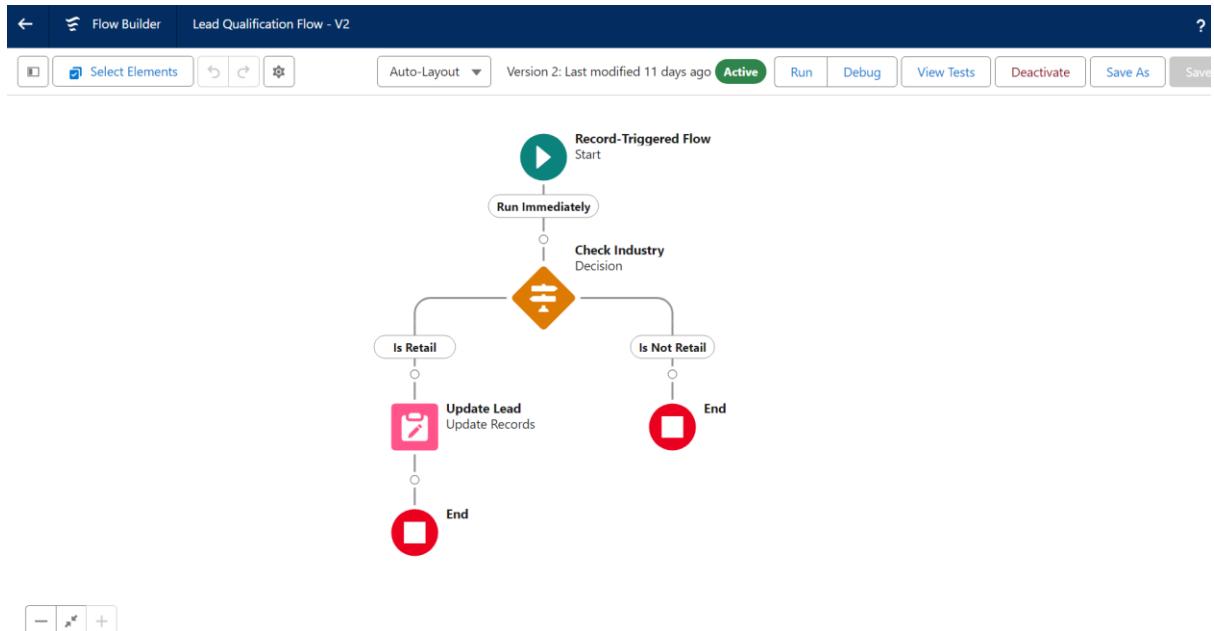
- > [No subject] 16 Aug
- > [No subject] 16 Aug

You have an upcoming task

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

However the subject line is empty, it can be set up under create records section under the set-up values of the field manually.

- Lead Qualification Flow: - Guide users through a series of steps to qualify leads based on predefined criteria. In this case, the flow will work when industry will be retail.



The object is set to Lead, and the trigger will work when the record is created or updated. There are no condition requirements.

Start Record-Triggered Flow

Object: **Lead** Edit
Trigger: **A record is created or updated**
Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Lead

Run Immediately

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object: **Lead**

Configure Trigger

*Trigger the Flow When:

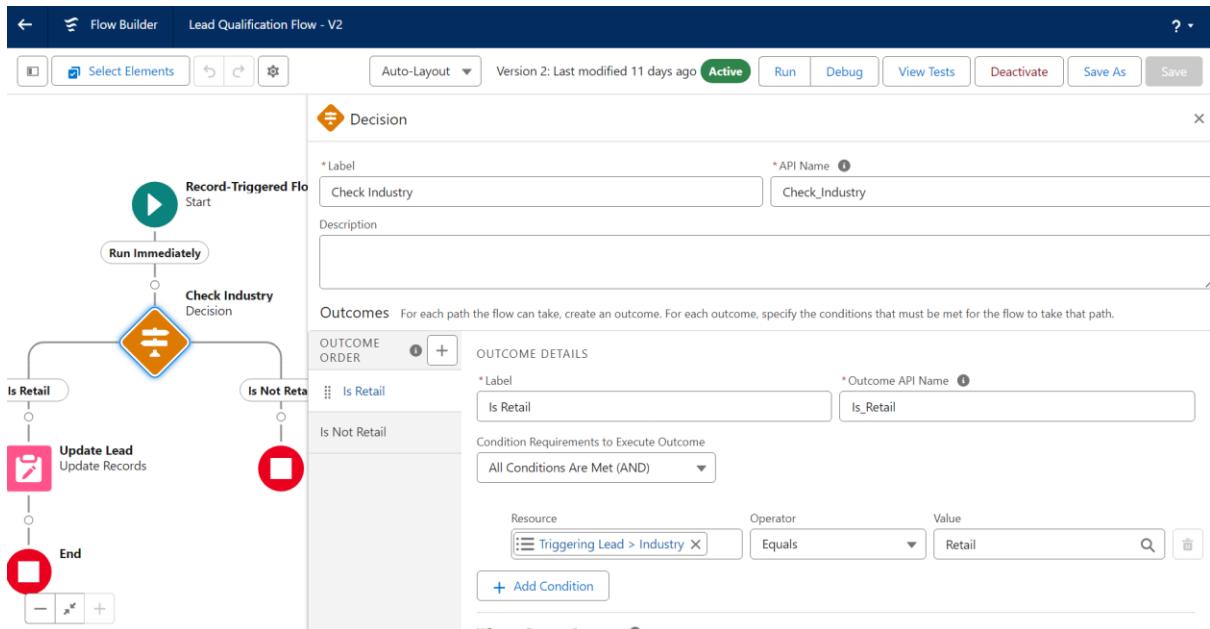
- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

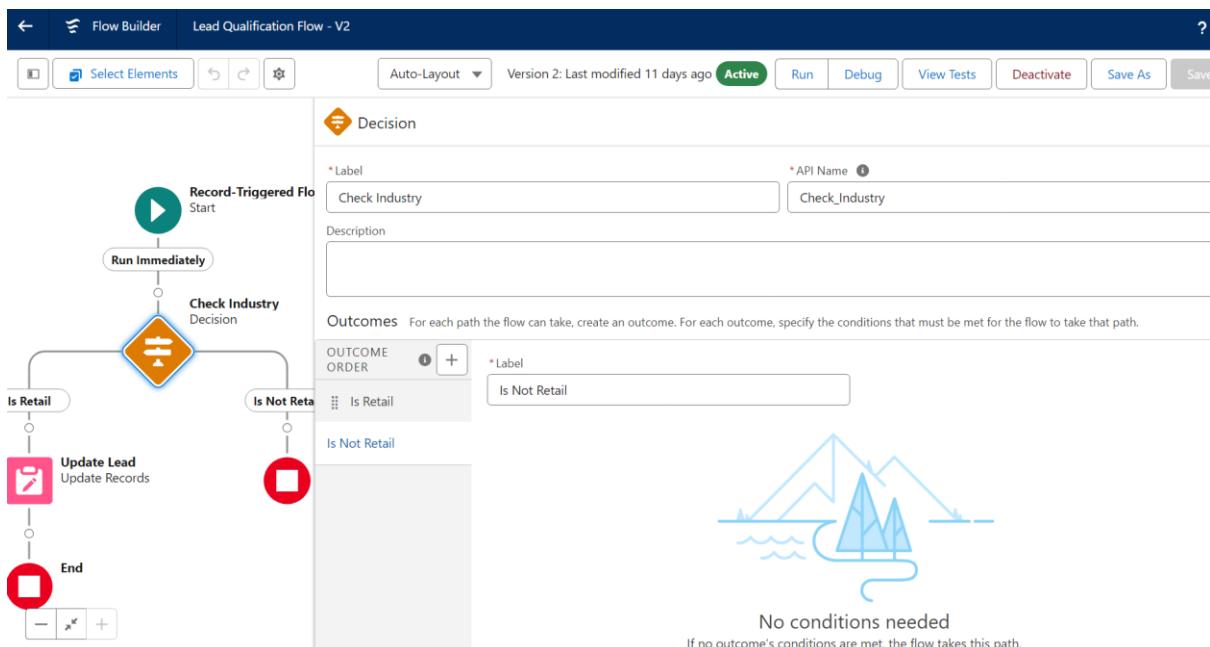
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

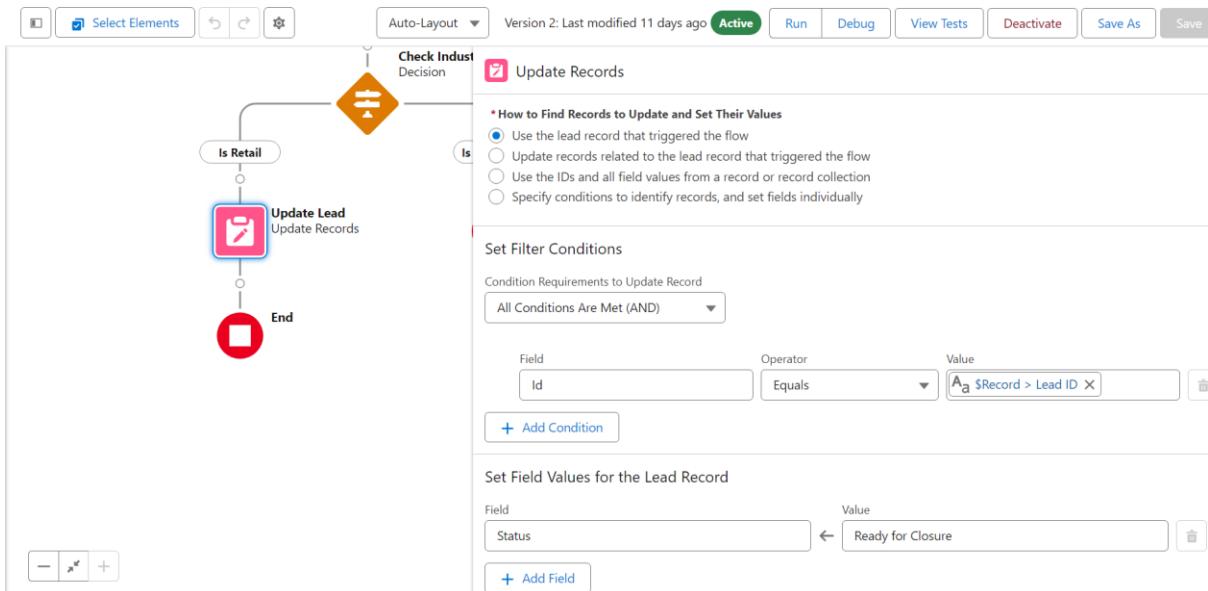
To check whether the industry is retail or not, the condition is set that industry type should be equal to Retail.



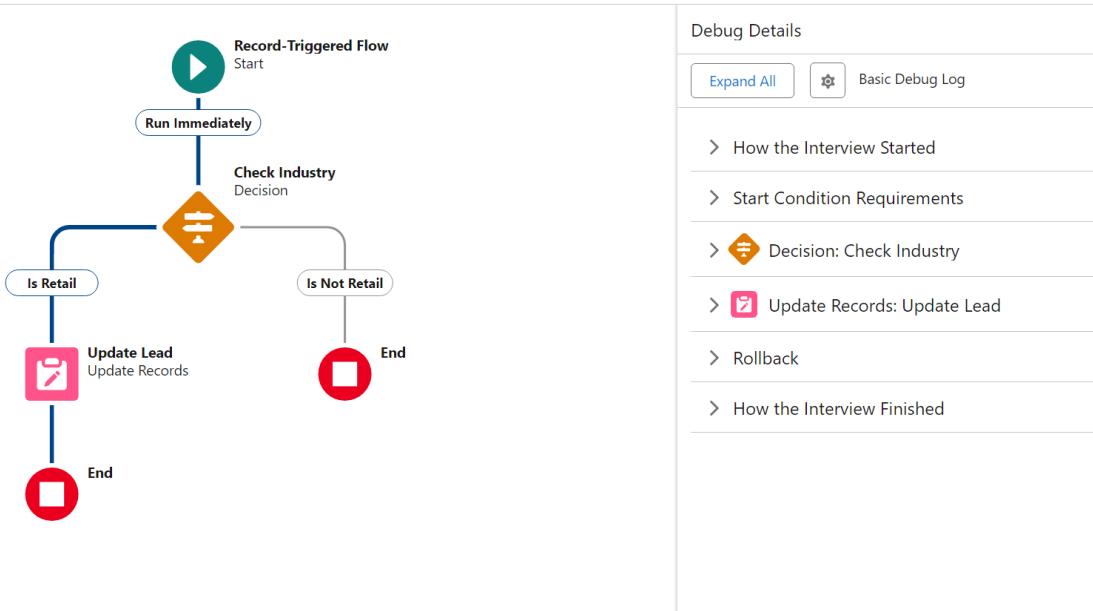
There won't be any further action taken if retail is not industry.



If the retail is industry, then the lead record will be used that triggered the flow. If the Id is equal to the Lead ID, then status will be converted to Ready for Closure.



The flow has been debugged. There were no errors, so the flow is working successfully.



3) Reports and Dashboards:-

- **Lead Conversion Report:** - This report will monitor how many leads are converted into opportunities and accounts.

Firstly, new custom report needs to be created. The primary object will be Leads and the label of Report Type will be Leads with Converted Opportunities and Accounts.

The screenshot shows the 'Report Types' setup page. The 'Primary Object' is set to 'Leads'. The 'Report Type Label' is 'Leads with Converted Opportunities and Accounts'. The 'Report Type Name' is 'Leads_with_Converted_Op'. The 'Description' is 'Tracks Leads converted to Opportunities and Accounts'. The 'Report Type Category' is 'Other Reports'. Under 'Deployment', the status is 'In Development'. A note at the bottom states: 'A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.'

No change has been made to object Relationships; next Edit Layout option will be opened.

The screenshot shows the 'Object Relationships' section for the report type. It lists 'Leads (A)' as the source object. To the right, there is a diagram showing a large circle labeled 'A' above a smaller rectangle labeled 'A' with horizontal lines, indicating a relationship between the report type and the Leads object. Below this, the 'Fields Available for Reports' section is shown, with 'Source' set to 'Leads' and 'Selected Fields' showing 67 fields.

Under Edit Layout, the fields will be selected via add fields related via lookup

The screenshot shows the Salesforce Setup interface under the 'Report Types' section. On the left, there is a list of 'Leads' fields in a grid format. On the right, a sidebar displays a list of selected fields with a red circle highlighting the 'View' section. The 'View' section shows 'Leads Fields' and 'Add fields related via lookup ». A red arrow points from the 'Selected' section to the 'View' section.

Leads			
Address	Annual Revenue	City	Clean Status
Company	Company D-U-N...	Converted	Converted Acc...
Converted Con...	Converted Date	Converted Opp...	Country
Created By	Created Date	Current Gener...	D&B Company
Data.com Key	Description	Do Not Call	Email
Email Bounced...	Email Bounced...	Email Opt Out	Fax
Fax Opt Out	First Name	✓ Full Name	Gender Identity
Geocode Accur...	Individual	Industry	Last Activity
Last Modified...	Last Modified...	Last Name	Last Transfer...
Latitude	Lead ID	Lead Owner	Lead Record T...
Lead Source	Lead Status	Longitude	Mobile

Selected

- Checked by Default
- Added via Lookup

View:

Leads Fields

Add fields related via lookup »

Leads Fields [Page1/4]

Address Annual Revenue

City Clean Status

Company Company D-U-N...

Converted Converted Con...

Converted Date Converted Opp...

Country Created By

Created Date Current Gener...

Next Page ►

This layout will be saved.

The new report creation will be started where the following columns have been selected for creating reports.

REPORT ▾

Lead Conversion Report  Leads with Converted Opportunity

>  **Outline**  Filters 2  Previewing a limit

Groups

 GROUP ROWS

Add group... 

Columns 

Add column... 

Full Name 

Lead ID 

Converted Opportunity: Opportunity 

Converted Opportunity: Opportunity 

Converted Account: Account Name 

	Full Name
1	Jennie Rose
2	Jennifer Lolte
3	Thomas McHil
4	Natasha Stanz
5	Viktor Nowak

The columns have been filtered by some conditions shown below

The screenshot shows a software application's interface with a sidebar on the left and a main content area on the right. The sidebar has a grey header with a checkmark icon and a vertical list of numbers 1 through 5. The main content area has a header with 'Outline' and 'Filters' (with a blue circle containing the number 2). Below this is a 'Filters' section with a dropdown arrow, a search bar with a magnifying glass icon, and two buttons: 'Add filter...' and 'Show Me My leads'. At the bottom of the filters section is another button labeled 'Converted Date Current FQ (1 Jul 2024 - 30 Sept 2024)'.

The Lead Conversion Report has been uploaded to GitHub folder.

- Sales Pipeline Report: - This report visualizes opportunities by stage, amount and close date.

Firstly, the report type will be of opportunities.

The screenshot shows a software interface for report configuration. At the top left, there's a 'REPORT' dropdown menu with a downward arrow. Next to it is a 'Sales Pipeline Report' button with a pencil icon, and a 'Opportunities' button which is highlighted with a light blue background. On the far right, there are three small icons: a circular arrow, a square with a diagonal line, and a left-pointing arrow. Below this header, the main content area is titled 'The following columns has been selected: -'. Underneath this title is a 'Columns' section with a dropdown arrow icon. A search bar labeled 'Add column...' with a magnifying glass icon is positioned below the dropdown. A list of selected columns follows, each with a red 'X' icon to its right for removal:

- Opportunity Owner
- Account Name
- Opportunity Name
- Fiscal Period
- # Probability (%)
- Created Date
- Lead Source
- # Amount

Where the amount has been summarized for opportunities.

A screenshot of a data analysis interface. On the left, there's a list of columns: 'Fiscal Period', '# Probability (%)', 'Created Date', 'Lead Source', and '# Amount'. The '# Amount' column is currently selected, highlighted with a blue border. A modal window titled 'Edit Column' is open over the list, specifically under the 'Summarize' section. This section contains five options with checkboxes: 'Sum' (which is checked), 'Average', 'Max', 'Min', and 'Median'. At the bottom of the modal are 'Cancel' and 'Apply' buttons, along with three toggle switches labeled 'Row Counts', 'Detail Rows', and 'Grand Total'. The background shows a table with columns like 'Closed Won', 'Sum of Amount', and numerical values.

Next rows have been grouped by Stage and columns have been grouped by close date.

A screenshot of the 'Groups' section in a data analysis interface. At the top, there are 'Outline' and 'Filters' buttons, with a '2' notification badge next to the filters button. Below this is a 'Groups' header with edit and delete icons. There are two main sections: 'GROUP ROWS' and 'GROUP COLUMNS'. Under 'GROUP ROWS', there's a search bar with 'Add group...' placeholder text and a magnifying glass icon. Under 'GROUP COLUMNS', there's also a search bar with 'Add group...' placeholder text and a magnifying glass icon. A specific group named 'Stage' is listed under 'GROUP ROWS'. Another group named 'Close Date' is listed under 'GROUP COLUMNS' and has a delete 'X' icon to its right.

Also, these are the filters applied

REPORT ▾

Sales Pipeline Report Opportunit

Fields > Outline Filters **2**

Filters ▼

Add filter... 🔍

Show Me
All opportunities

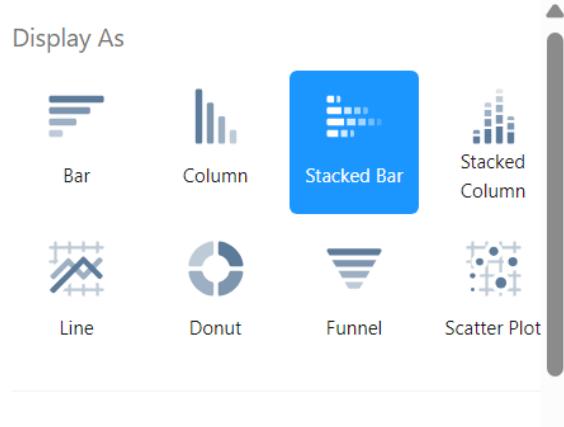
Close Date
1 Jul 2024 - 17 Sept 2026

Opportunity Status
Any

Probability
All

Opportunity Owner
equals Mrigya Sharma ✖

For chart, we will choose stacked bar,

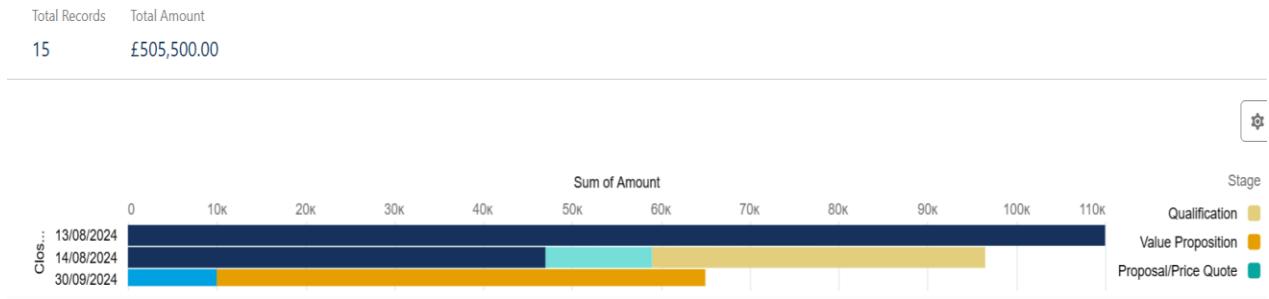


The object for Y-axis will be close date and object for x-axis will be sum of amount.

The screenshot shows a configuration panel for a stacked bar chart. It includes sections for "Y-Axis" (set to "Close Date"), "X-Axis" (set to "Sum of Amount"), and "Stack By" (set to "Stage"). The "Stack By" section includes a color swatch with three distinct segments: blue, dark blue, and teal. There is also an unchecked checkbox for "Show Reference Line".

The final report is uploaded to the github folder under the name of Sales Pipeline Report.

However, this is the chart sample



- Sales Performance Dashboard: - This dashboard displays key metrics such as total sales and win rates.

Firstly, we will create a Report on Total Sales based on opportunities.

REPORT ▾
Total Sales Opportunities

These following columns have been used.

Fields > Outline Filters 2

Columns

Add column...

Opportunity Owner	X
Account Name	X
Fiscal Period	X
# Amount	X
# Expected Revenue	X
# Probability (%)	X
# Age	X
Close Date	X
Created Date	X
Next Step	X
Lead Source	X
Type	X

The amount has been summarized

A screenshot of a 'Edit Column' dialog box. On the left, a list of fields is shown: Opportunity Owner, Account Name, Fiscal Period, # Amount, # Expected Revenue, # Probability (%), # Age, and Close Date. The '# Amount' field is selected and highlighted with a blue border. On the right, the 'Summarize' section contains five options: Sum (checked), Average, Max, Min, and Median. At the bottom right of the dialog are 'Cancel' and 'Apply' buttons.

The columns have been grouped by Opportunity Name.

A screenshot of a report outline interface. The 'Outline' tab is selected. Under the 'Groups' section, there is a 'GROUP ROWS' section with an 'Add group...' button and a search icon, and an 'Opportunity Name' field with a delete 'X' button. Below it is a 'GROUP COLUMNS' section with an 'Add group...' button and a search icon. The 'Columns' section at the bottom shows a dropdown menu with several options listed.

The report of Total sales has been uploaded to github folder.

Next report that needs to be created is Win Rate.

The report type of Win Rate is Opportunity.

The following filters has been used

A screenshot of a reporting interface showing the 'Filters' section. The top navigation bar includes 'REPORT ▾', 'Win Rate', and 'Opportunities'. The 'Filters' tab is selected, indicated by a blue underline and a blue circle with the number '1'. The left sidebar shows 'Fields > Filters'. The main area displays five filter criteria:

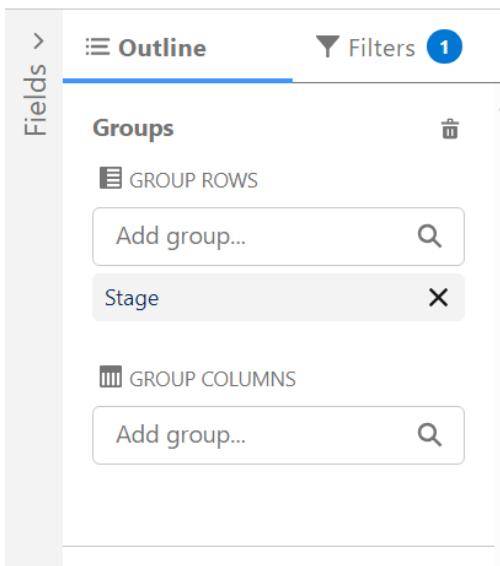
- Filters**: A dropdown menu with an 'Add filter...' button and a magnifying glass icon.
- Show Me**: All opportunities
- Close Date**: Current FQ (1 Jul 2024 - 30 Sept 2024)
- Opportunity Status**: Any
- Probability**: All

The following columns has been selected

A screenshot of a reporting interface showing the 'Columns' section. The top navigation bar includes 'REPORT ▾', 'Win Rate', and 'Opportunities'. The 'Outline' tab is selected, indicated by a blue underline. The left sidebar shows 'Fields > Columns'. The main area displays a list of selected columns, each with a delete 'X' icon:

- Add column...
- Opportunity Owner
- Account Name
- Opportunity Name
- Fiscal Period
- # Amount
- # Expected Revenue
- # Probability (%)
- # Age
- Close Date
- Created Date
- Lead Source

The rows have been grouped by Stage



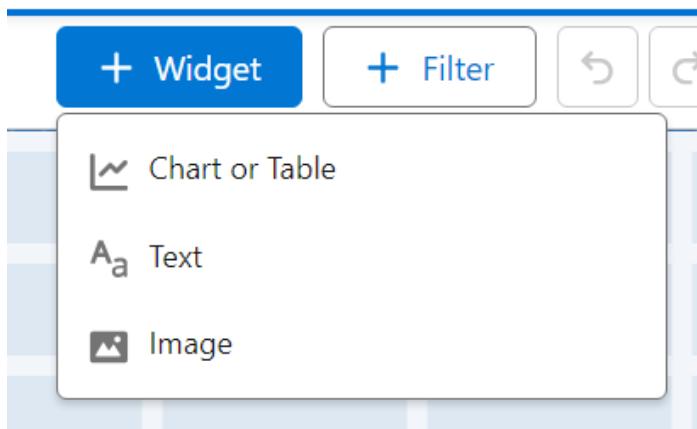
The win rate will be calculated in the following way by using summary column formula

Edit Summary-Level Formula Column

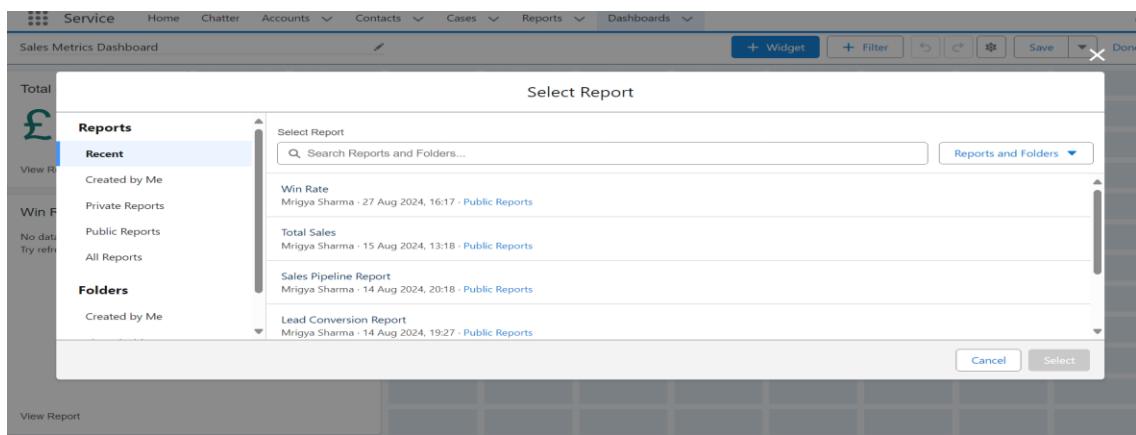
The screenshot shows the 'Edit Summary-Level Formula Column' dialog. It includes a formula editor with operators (+, -, *, /, ^, (,)) and a help link. The formula entered is '1 WON:SUM/CLOSED:SUM'. To the right, there's a 'Display' section with a preview of a grid showing the calculated win rate, and a 'How to apply this formula' section. At the bottom, there are radio buttons for 'All Summary Levels' and 'Grand Total Only', with 'Grand Total Only' selected.

The Win Rate report is available in GitHub folder.

Now after going to creating a New dashboard, the chart or Table option will be selected under Widget



Now total sales option will be selected



The metric display will be selected where the measure will be the sum of amount

Edit Widget

Report
Total Sales

Use chart settings from report

Display As

Measure
Sum of Amount

Preview

Total Sales

View Report (Total Sales)

We will follow the same steps as above for win rate, but instead of selecting metric display, the gauge chart will be chosen

Report
Win Rate

Use chart settings from report

Display As

Mode
 Standard Dynamic

Preview

Win Rate

7

View Report (Win Rate)

The dashboard is available in Github folder.

- Lead Source Dashboard: - This dashboard shows the effectiveness of different lead sources and conversion rates.

Since the Salesforce is considering Ready For Closure and Closed-Converted same, the custom formula under Leads is created under Fields and Relationships

The screenshot shows the 'Converted_Lead_Count' Custom Field Definition Edit page. The 'Field Information' section includes:

- Field Label: Converted_Lead_Count
- Field Name: Converted_Lead_Count
- Description: (empty)
- Help Text: (empty)
- Data Owner: User
- Field Usage: --None--
- Data Sensitivity Level: --None--
- Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) and Chosen (Available)

The following formula has been used

The screenshot shows the formula editor for the Lead object. The formula is defined as:

```
IF(ISPICKVAL(Status, "Closed - Converted"), 1, 0)
```

Now the report has been named to Lead Source Conversion success with the Lead Report Type.

REPORT ▾
Lead Source Conversion Success Leads

The following columns have been used for report

Fields > **Outline** Filters 2

Columns ▾

Add column...

First Name
Last Name
Title
Company / Account
Email
Street
Rating
Lead Owner
Lead Status

The following filters has been used

REPORT ▾

Lead Source Conversion Success

Fields > **Filters** 2

Filters ▾

Add filter...

Show Me
My leads

Create Date
On or after 8 Aug 2024

The Rows have been grouped by Lead source.

Fields > **Outline** Filters 2

Groups

GROUP ROWS

Add group...

Lead Source

GROUP COLUMNS

Add group...

The summary column formulas has been named as Conversion rate and the following formula has been used.

Source Conversion Success Leads

Edit Summary-Level Formula Column

Fields Functions

Search Fields

Count (1)
Record Count

Lead General (32)
A Lead Owner
A Lead Owner Alias
A Created By
A Created Alias
A Last Modified By

* Column Name Description

Conversion Rate

Formula Output Type Decimal Points

Type Percent 2

Formula Help

1 Lead.
Converted_Lead_Count__c:SUM/
RowCount

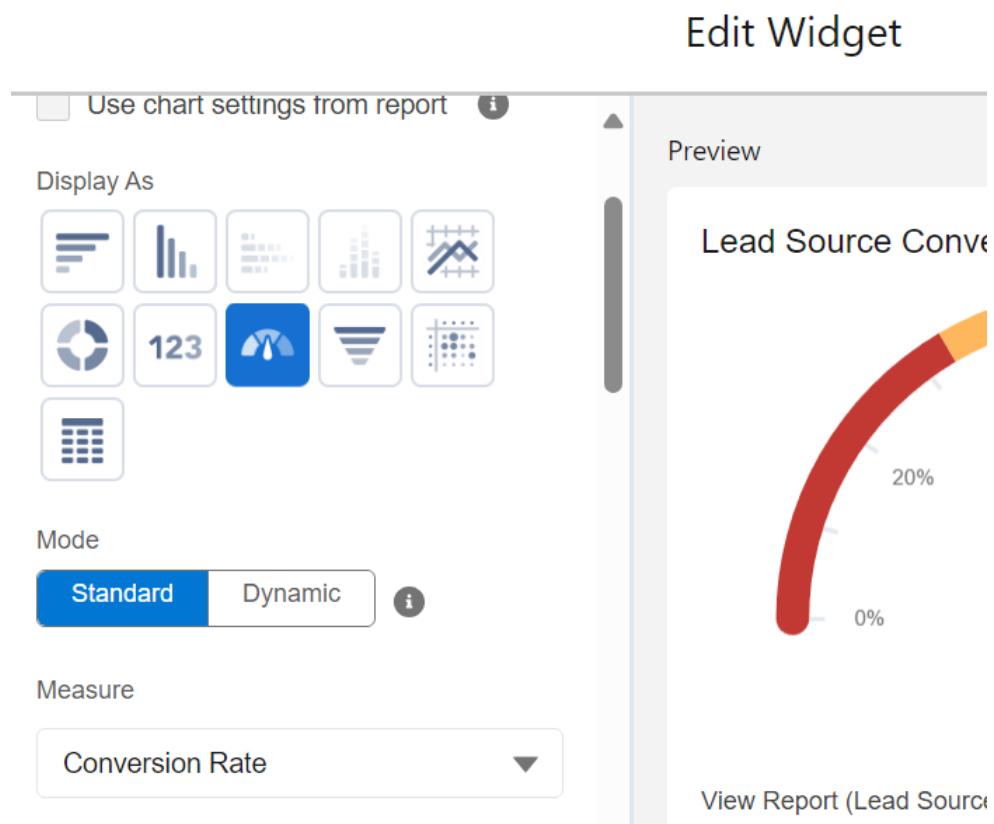
Display

How to apply this formula

Cancel Apply

The report of Lead Source Conversion Success is available in github folder.

Now for creating dashboards, the widget of gauge chart will be used for measuring conversion rate



For record count of lead sources, the donut chart has been used.

Edit Widget

Use chart settings from report i

Display As





Value

Record Count

Sliced By

Lead Source

Preview

Lead Source C

Re



5

View Report (Lead Source)

The dashboard is available in github folder.