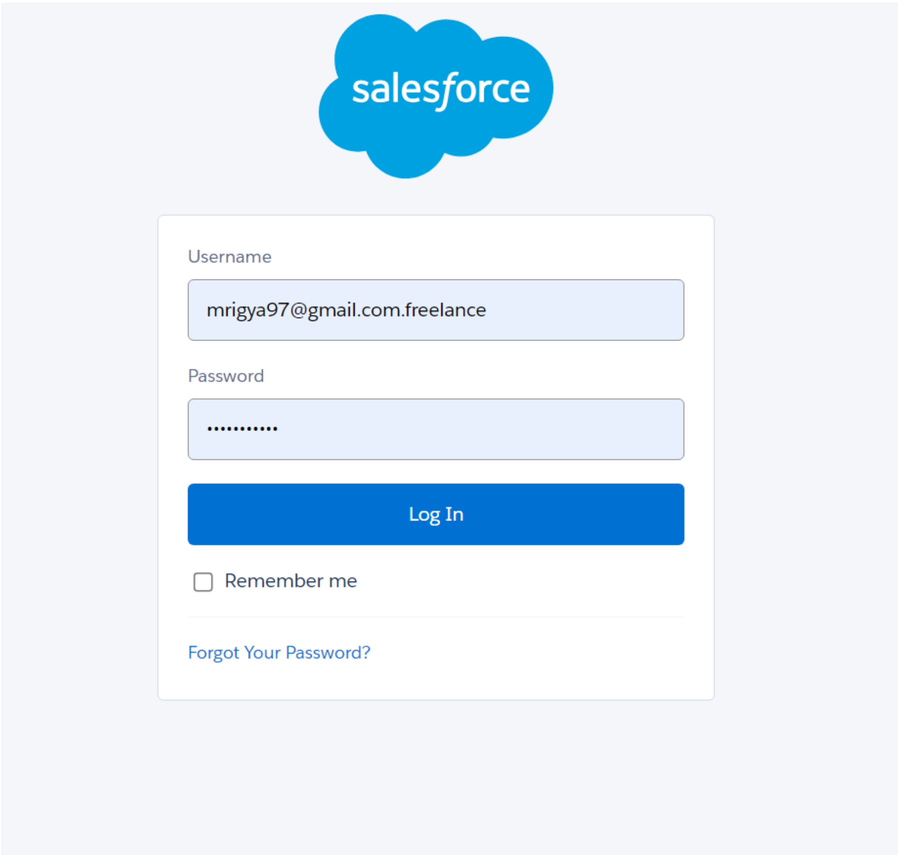
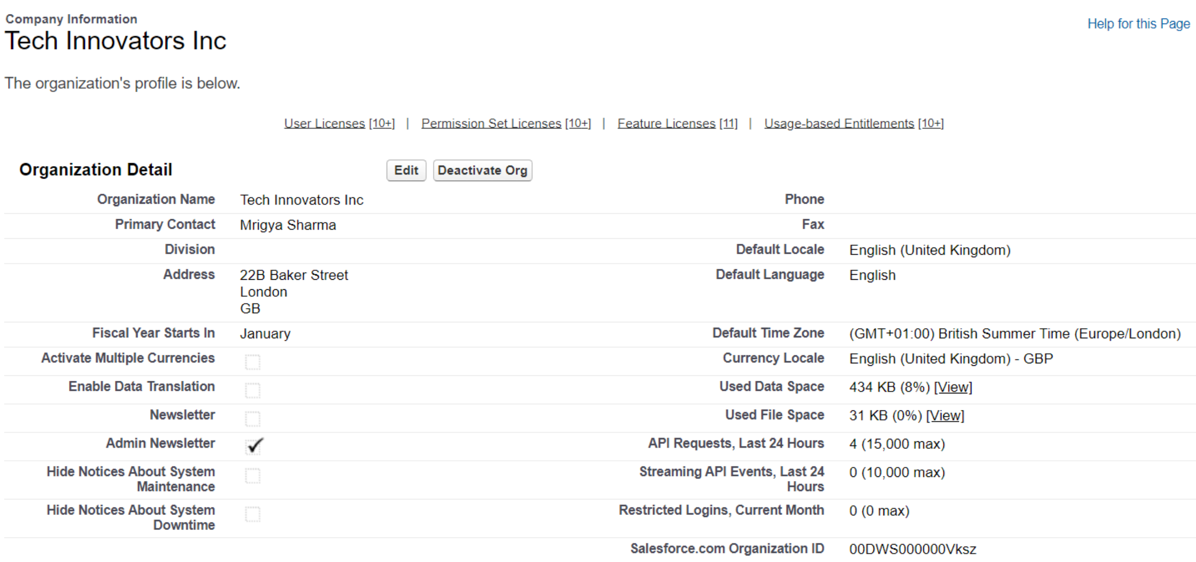
First early steps

So firstly, Salesforce Developer Org account is used to login



This is the company information which has been setup



Company Information

Tech Innovators Inc

Help for this Page

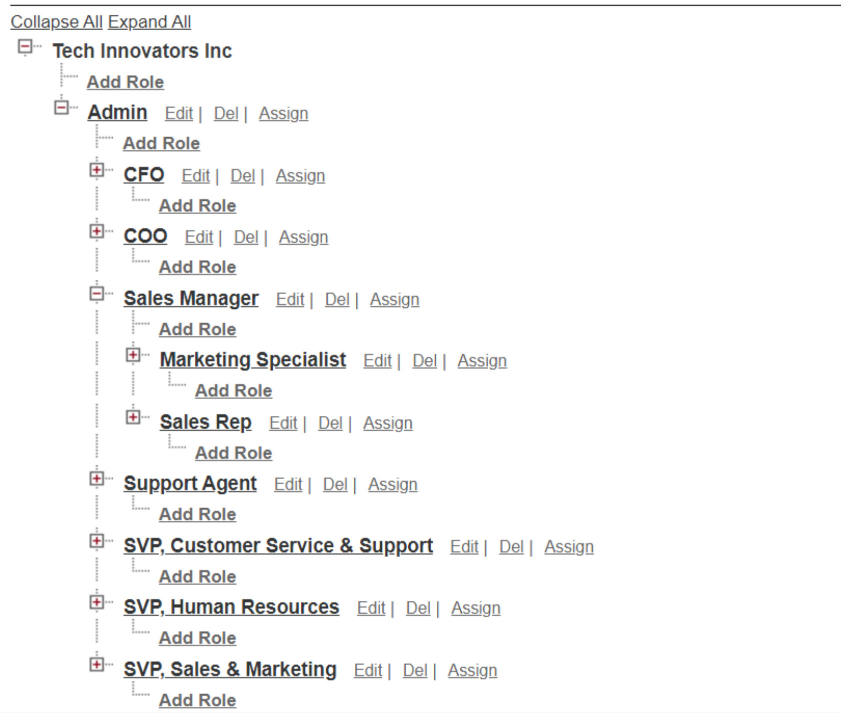
The organization's profile is below.

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

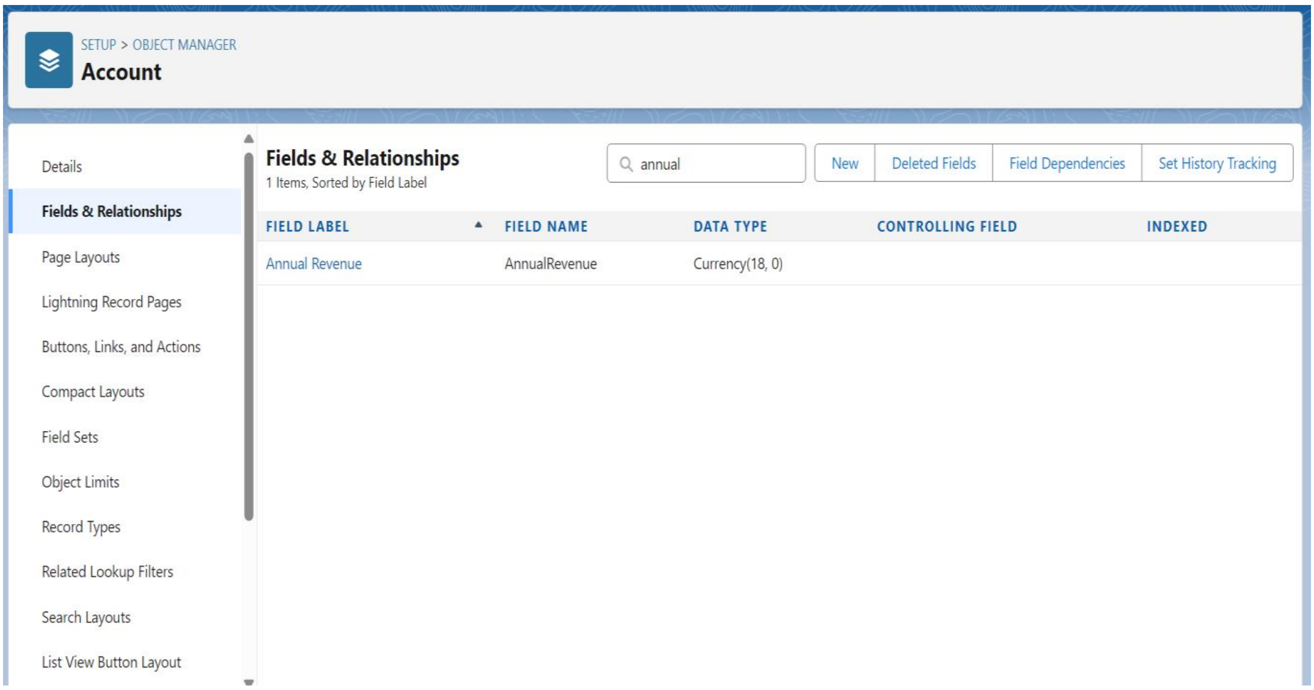
Organization Detail Edit Deactivate Org

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	☐	Currency Locale	English (United Kingdom) - GBP
Enable Data Translation	☐	Used Data Space	434 KB (8%) [View]
Newsletter	☐	Used File Space	31 KB (0%) [View]
Admin Newsletter	✓	API Requests, Last 24 Hours	4 (15,000 max)
Hide Notices About System Maintenance	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	☐	Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00DWS000000Vksz

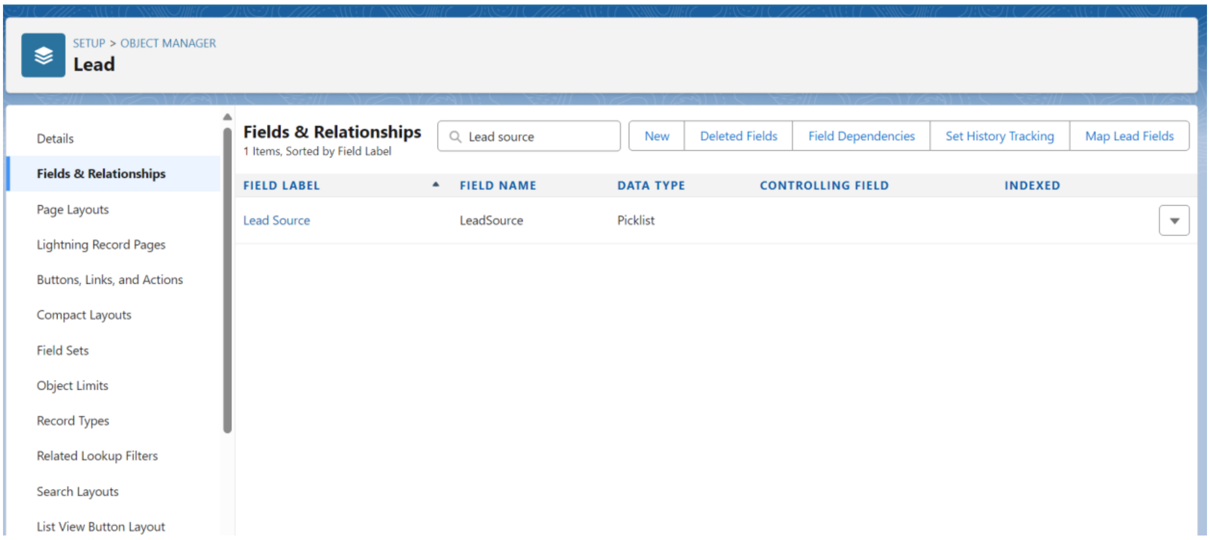
The role has been setup to the employees of the company



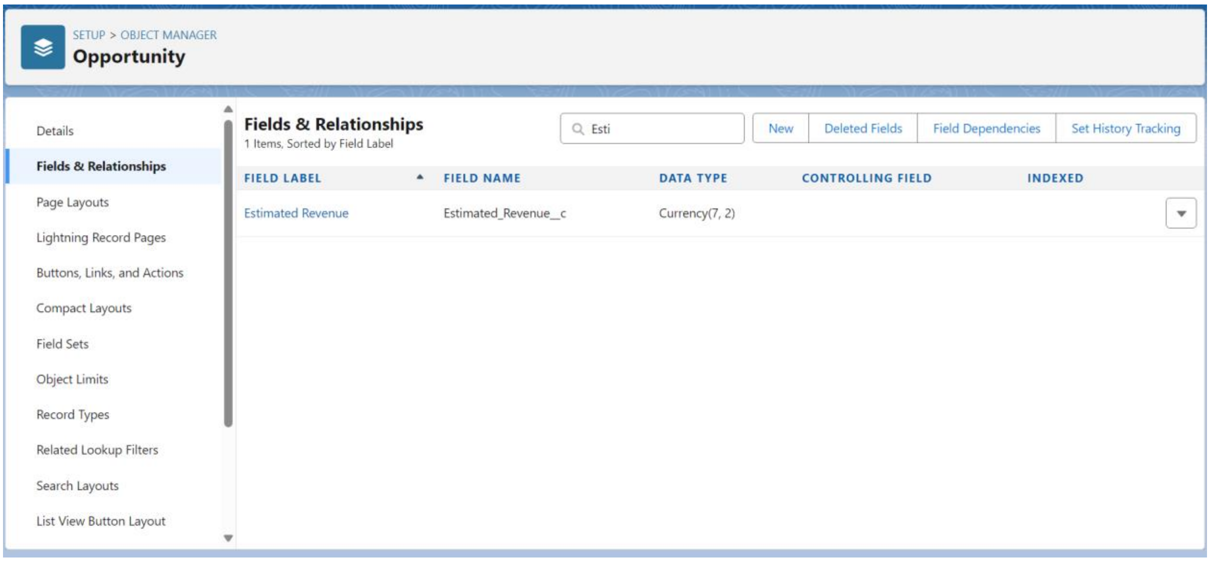
A Custom Field of Annual Revenue has been created under the Account Object Manager

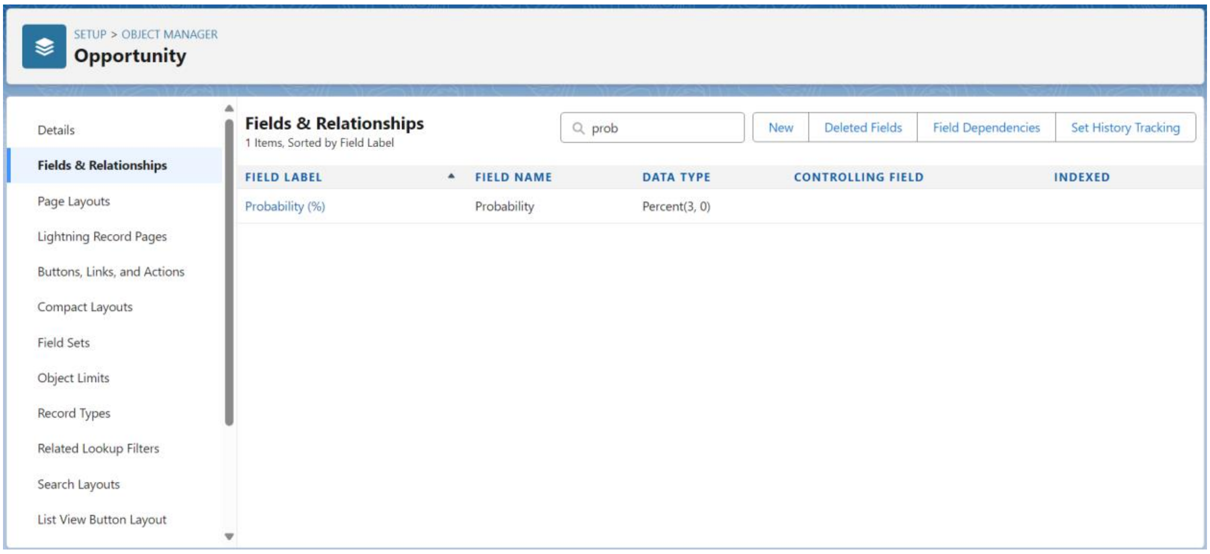


A Custom Field of Lead Source has been created under the Lead Object Manager



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

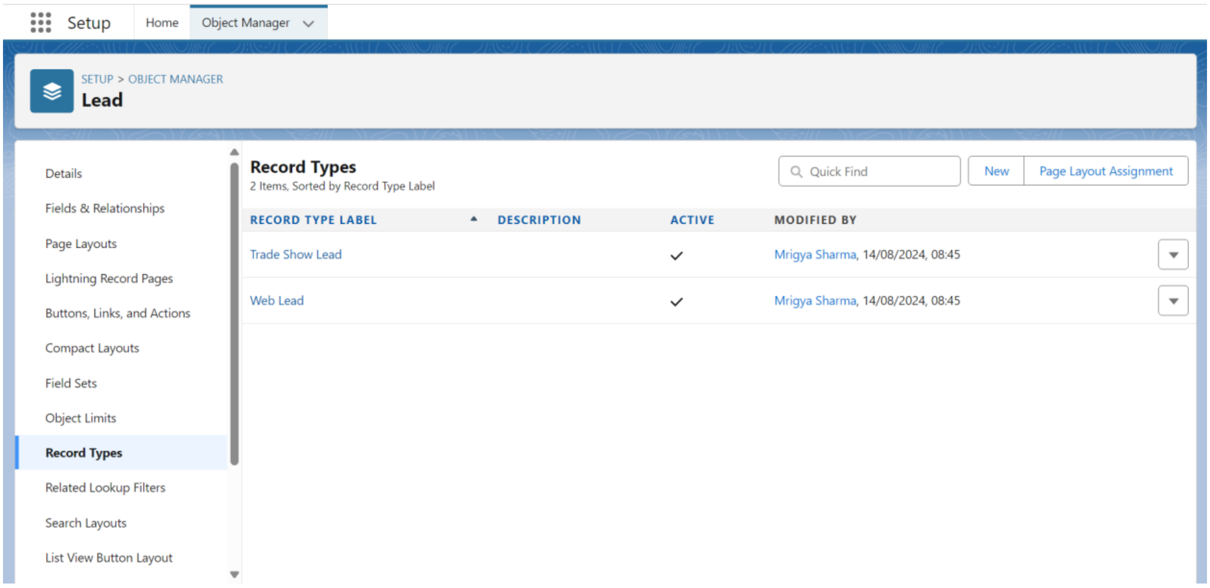




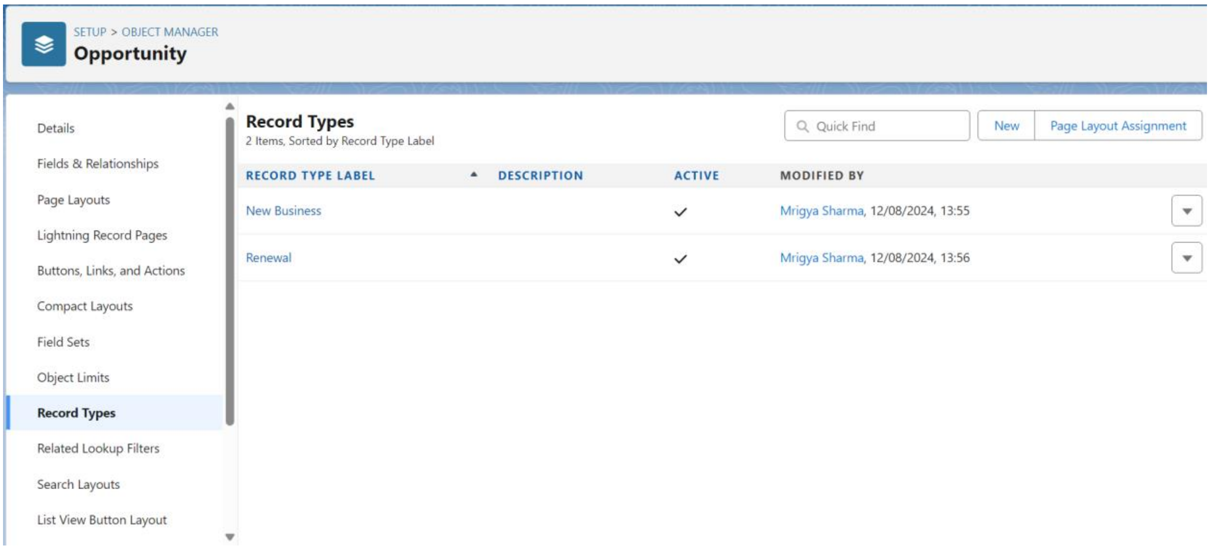
There has been no big significant change in page layouts.

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

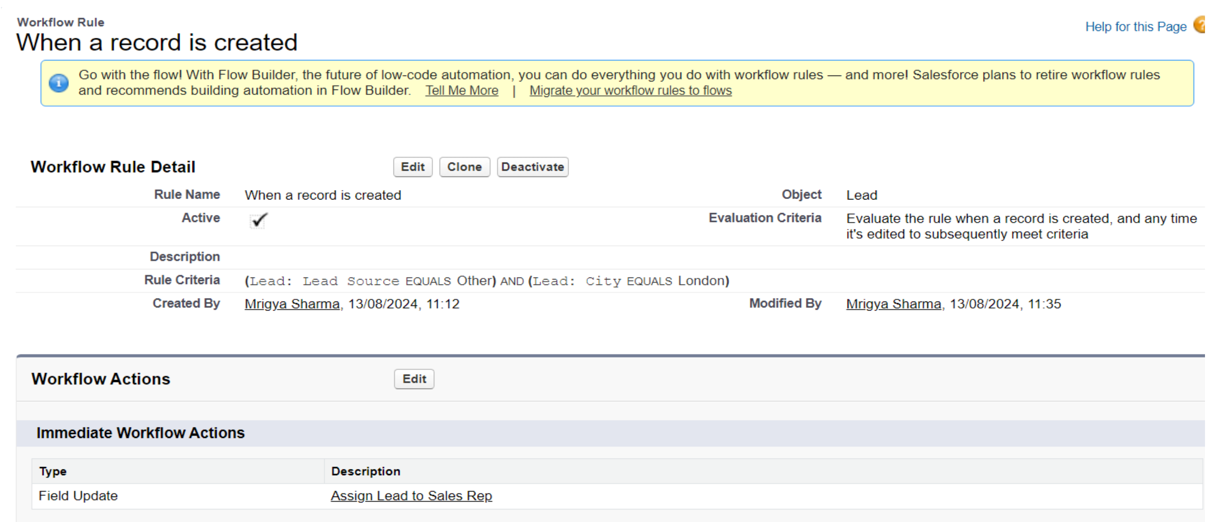


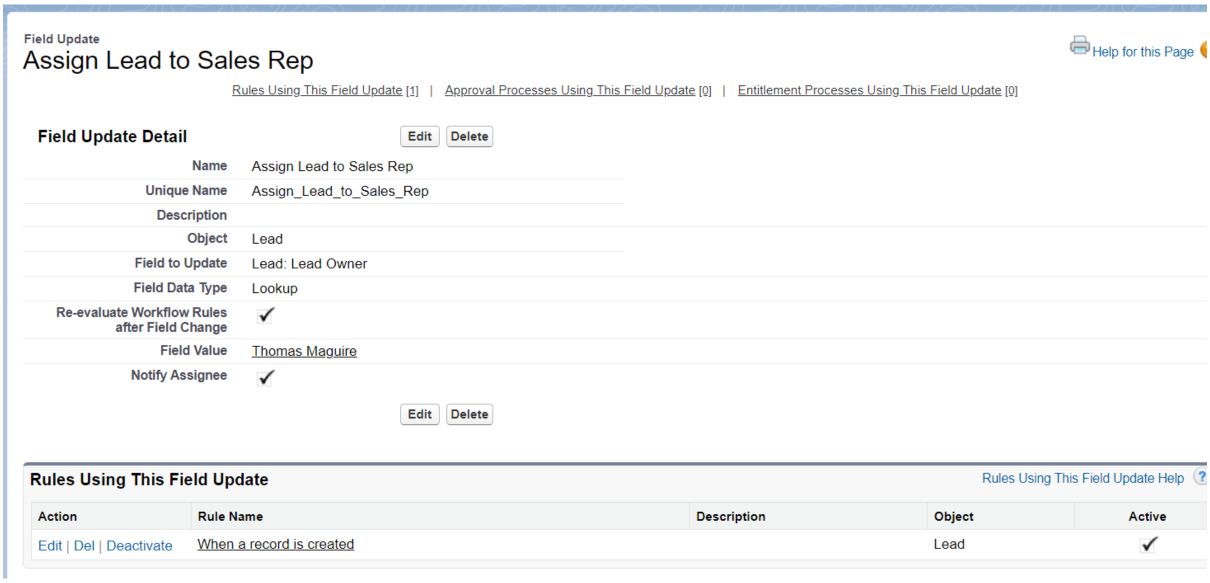
The two types of opportunities records has been created.



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



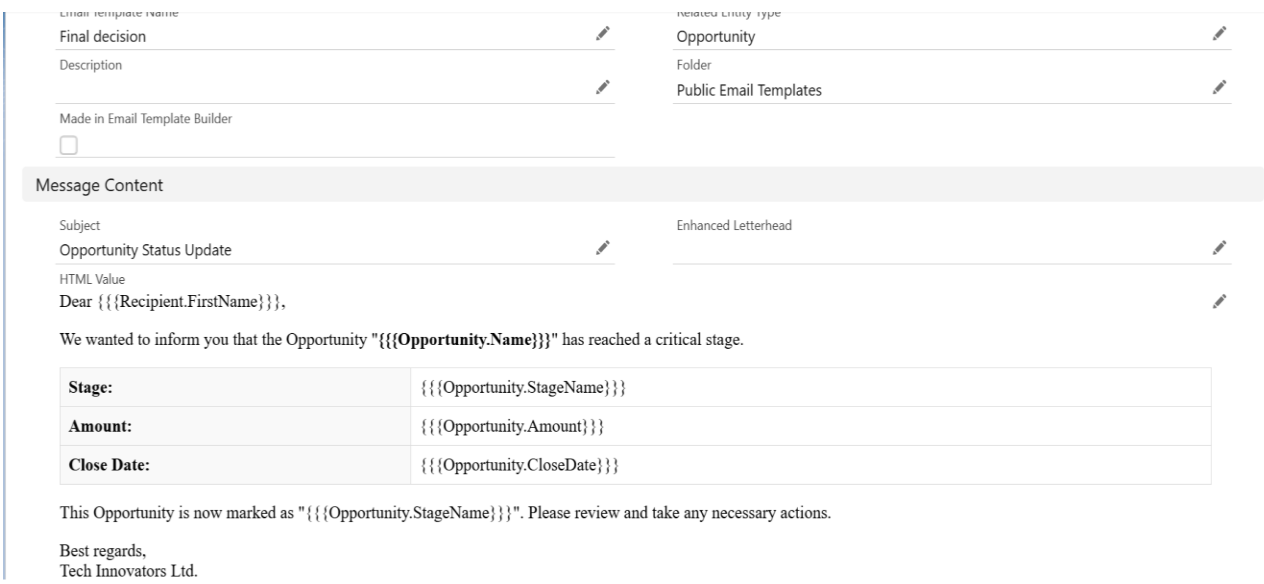


However, the rule won't work because the email address and the person to whom it has been assigned is imaginary.

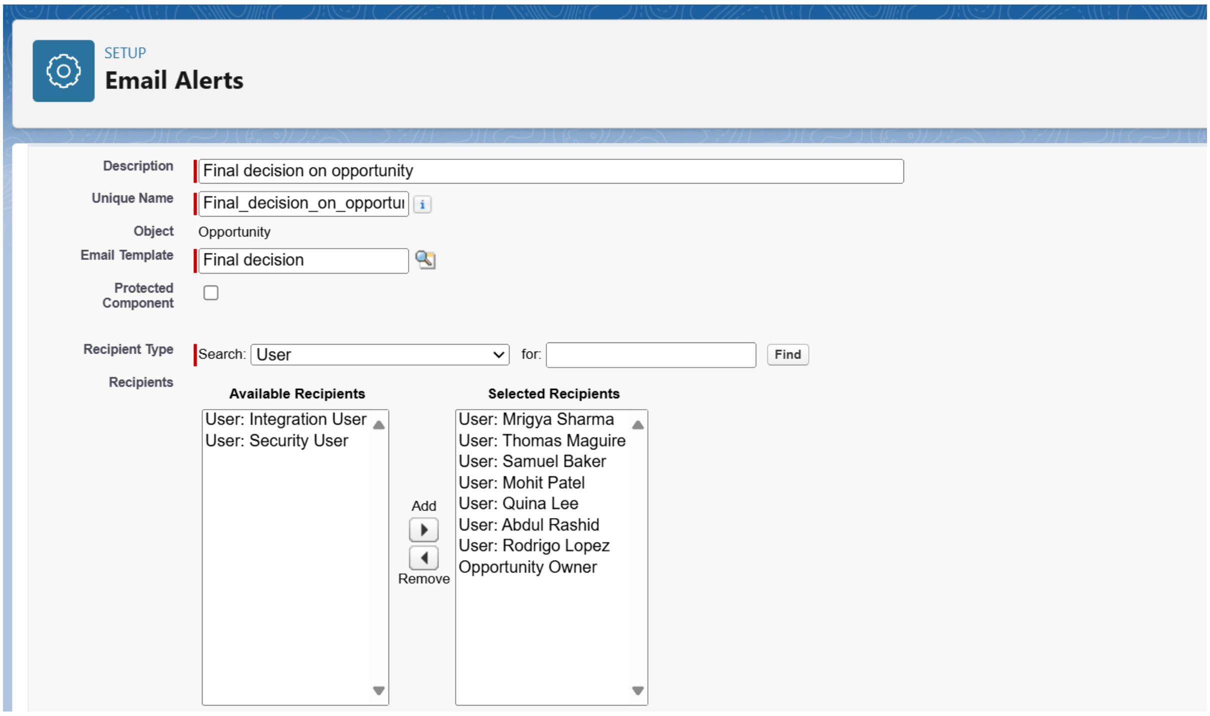
- Opportunity Stage Updates: -

  The rule has been implemented to send email alerts or task reminders when opportunities move to critical stages.

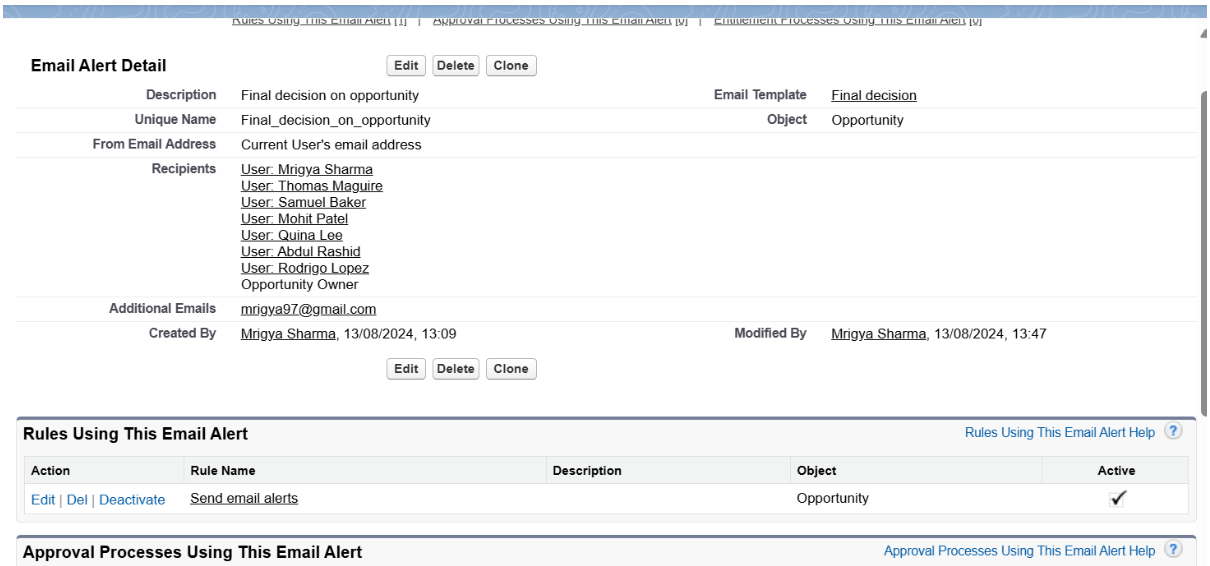
  Firstly, an email template has been created using custom options. The email template has been named as Final decision.



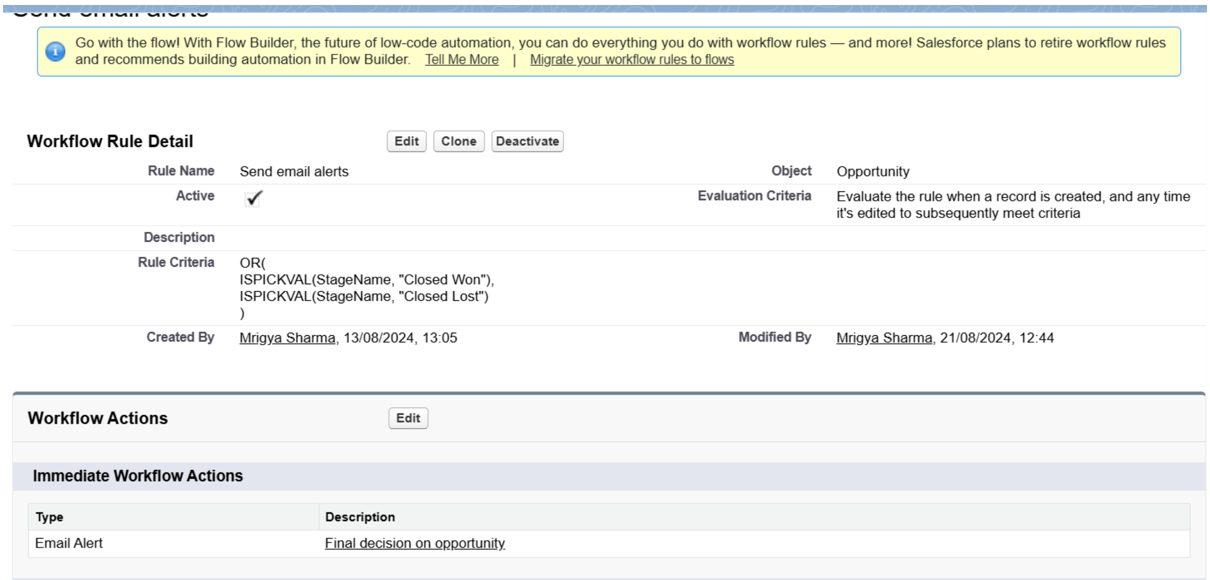
Then the email alerts along with custom template have been updated. This has been named as final decision on opportunity.



The condition has also been set



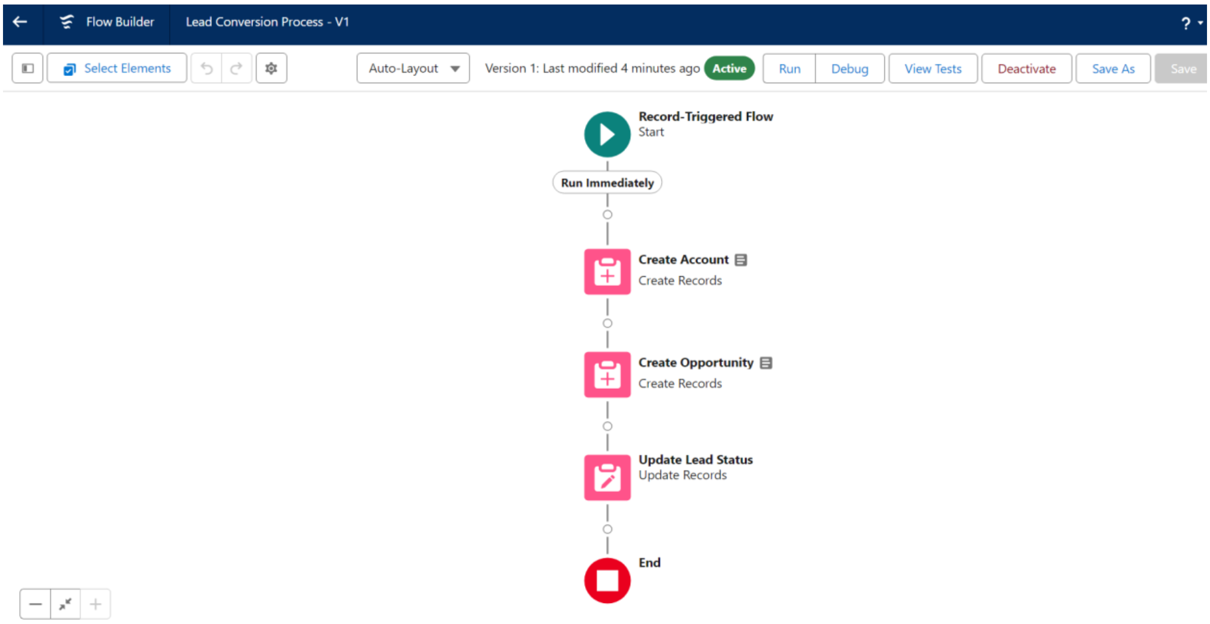
The workflow has been setup

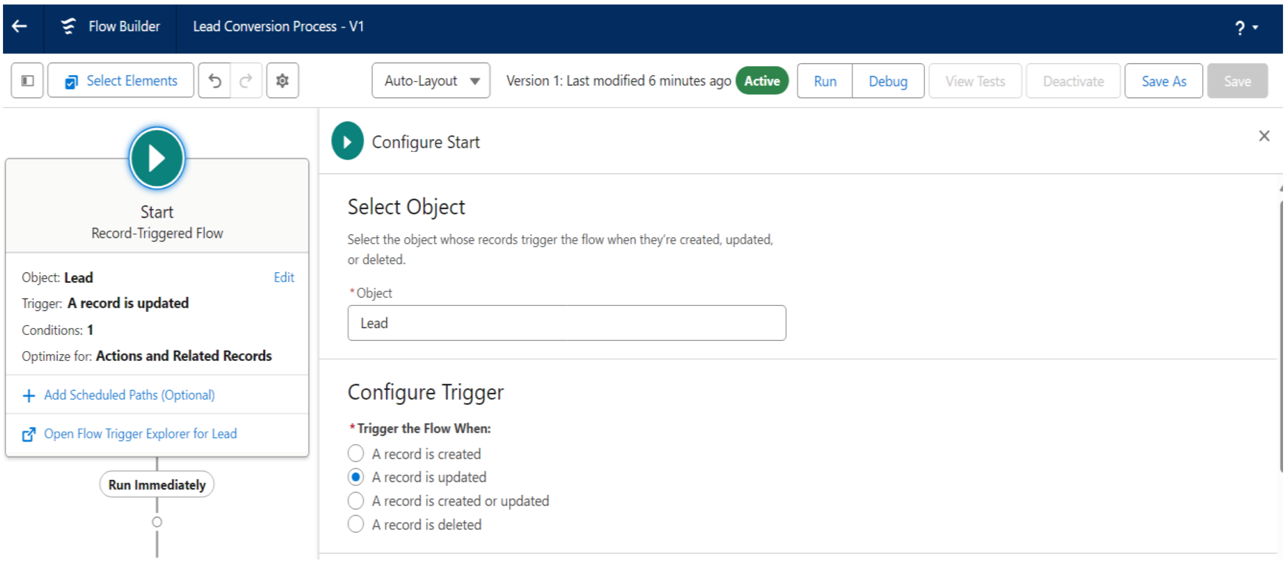


However, since the company and employees are imaginary, the emails has not been sent to the people when opportunities have been sent to critical stages like Closed won or Closed Lost.

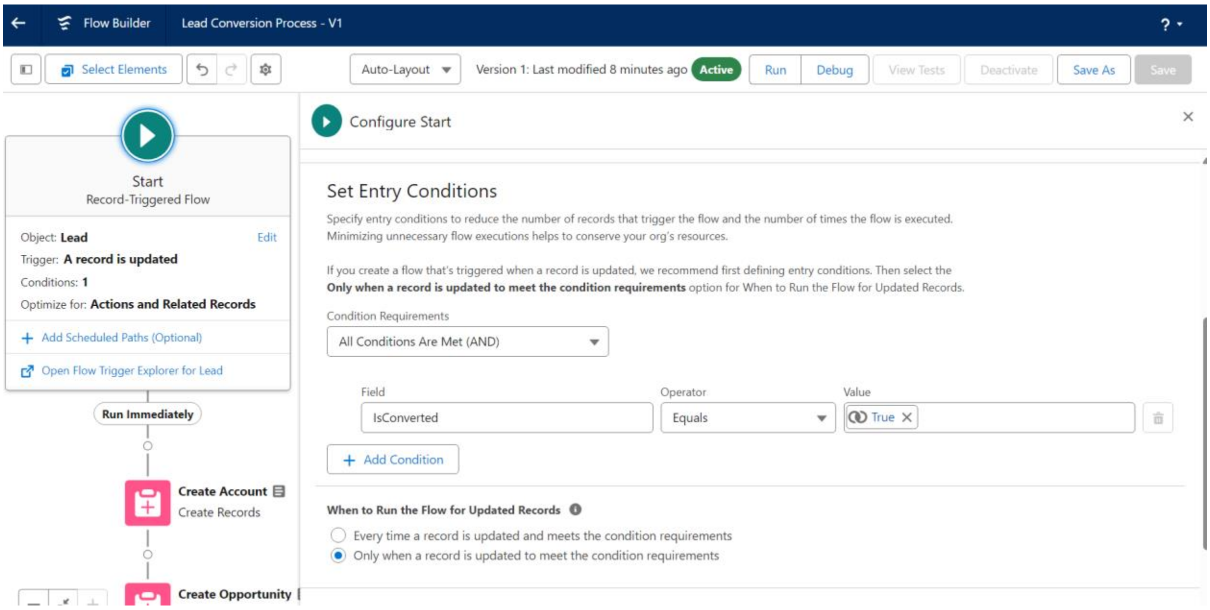
2) Flow Builder: -

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

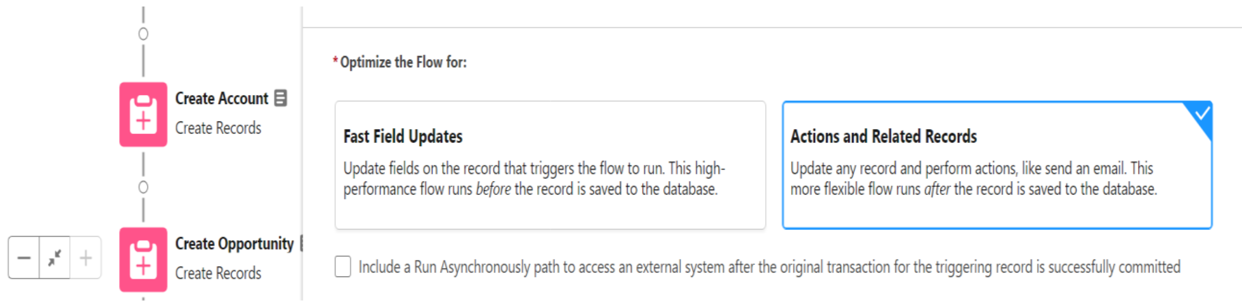




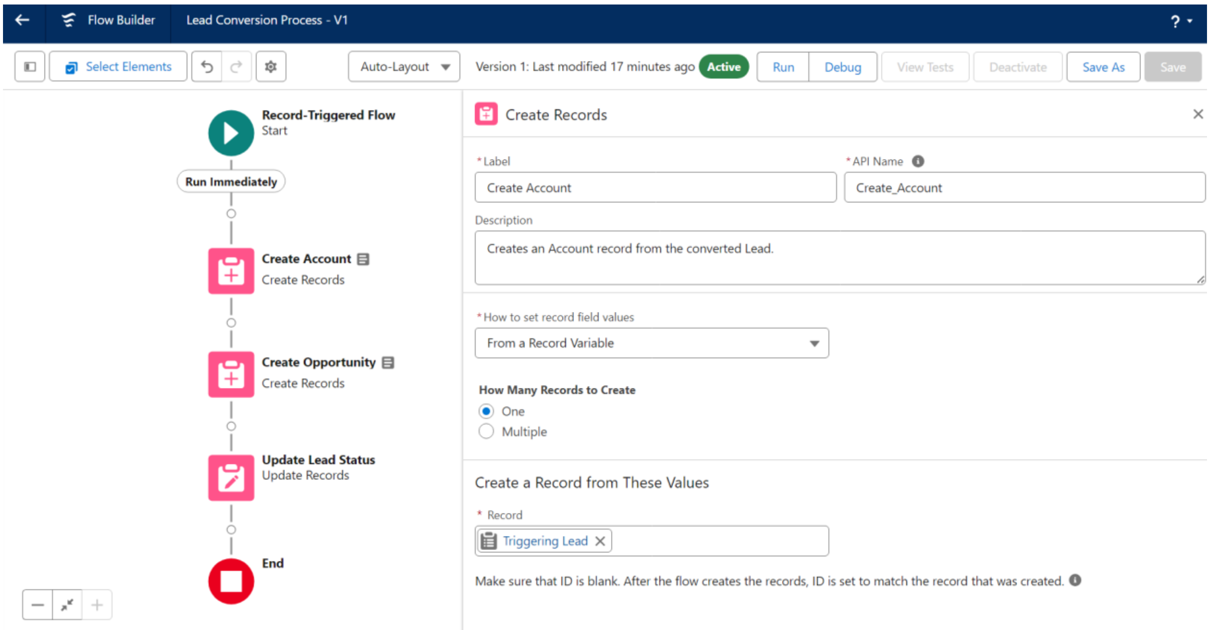
So the object has been set to Lead and the flow will trigger only when a record is updated.



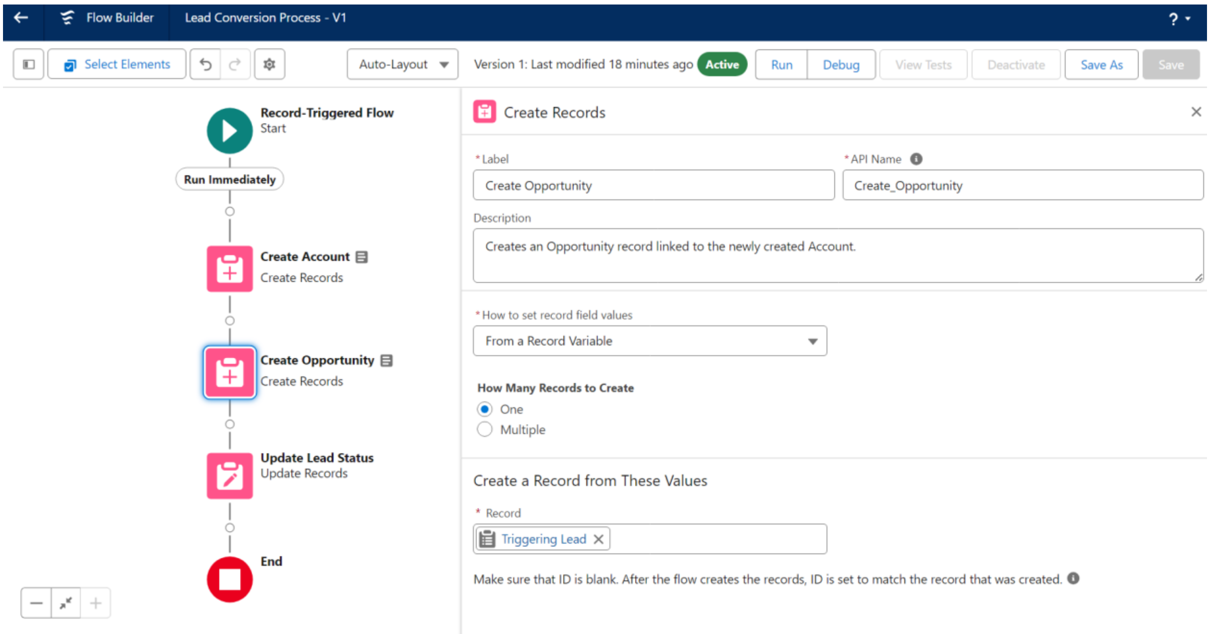
All Conditions are Met is set as a requirement where field IsConverted equals True. Flow will run only when a record is updated to meet the condition requirements.



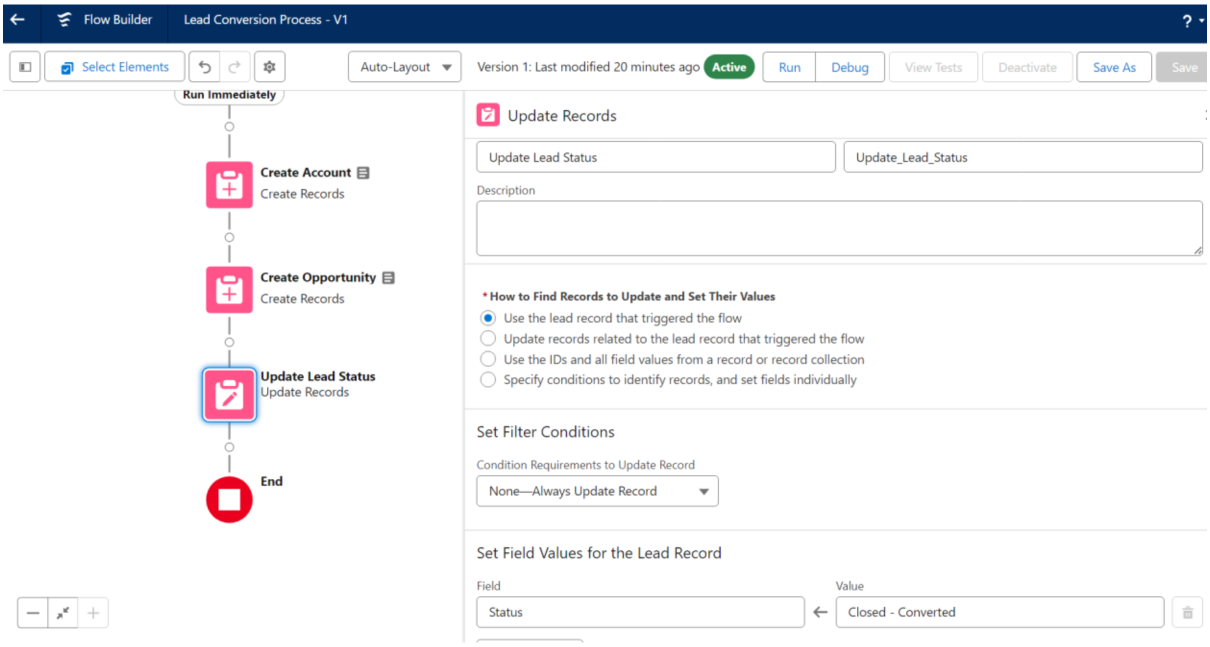
The flow is optimized for action and related records.



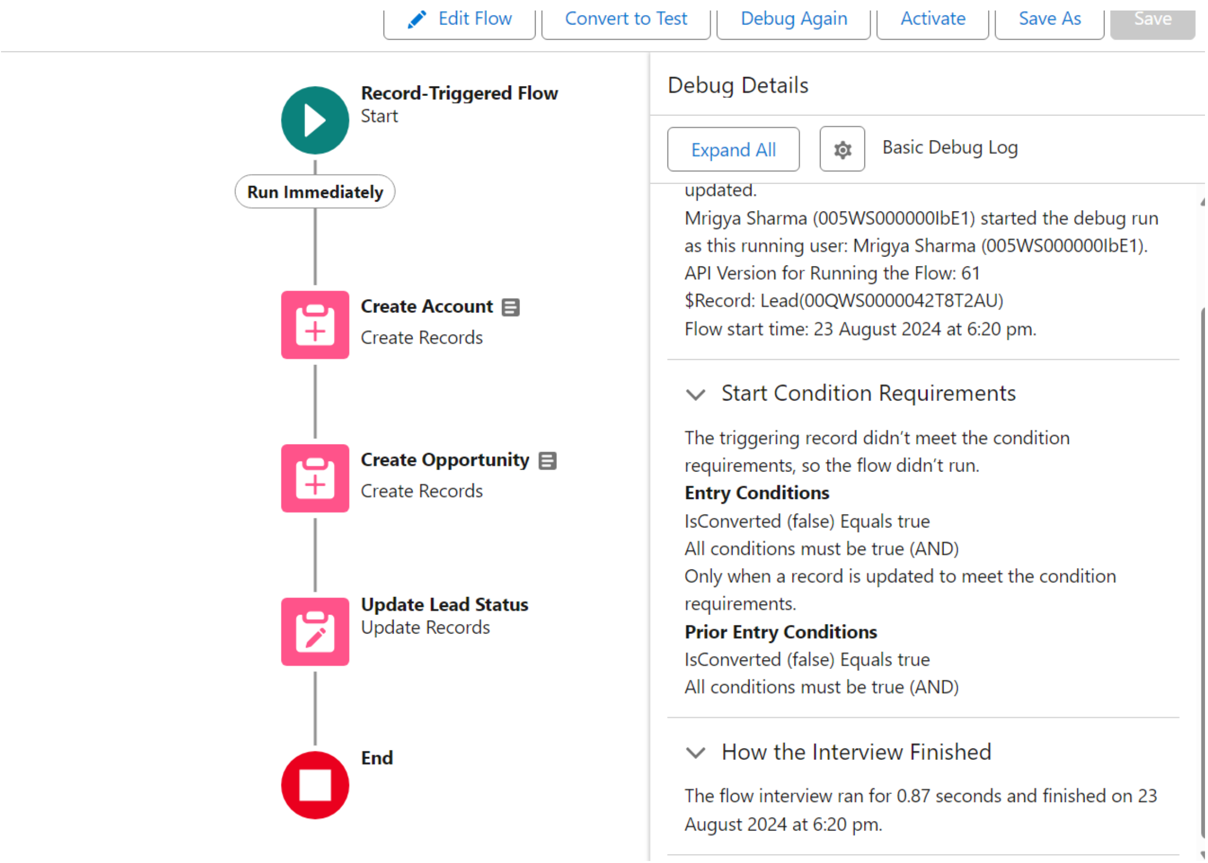
For creating an account from a lead as a first step, only one record can be created from the triggering lead.



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	☐	00QWS0000042Sh32AE	Negotiation/Review	14/08/2024	MShar	▾
14	☐	00QWS0000042S9B2AU	Qualification	14/08/2024	MShar	▾
15	☐	00QWS0000042RrR2AU	Closed Won	14/08/2024	MShar	▾
16	☐	00QWS0000042Qgs2AE	Qualification	14/08/2024	MShar	▾

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

Accounts
All Accounts ▾

New | Import | Printable View | Assign Label

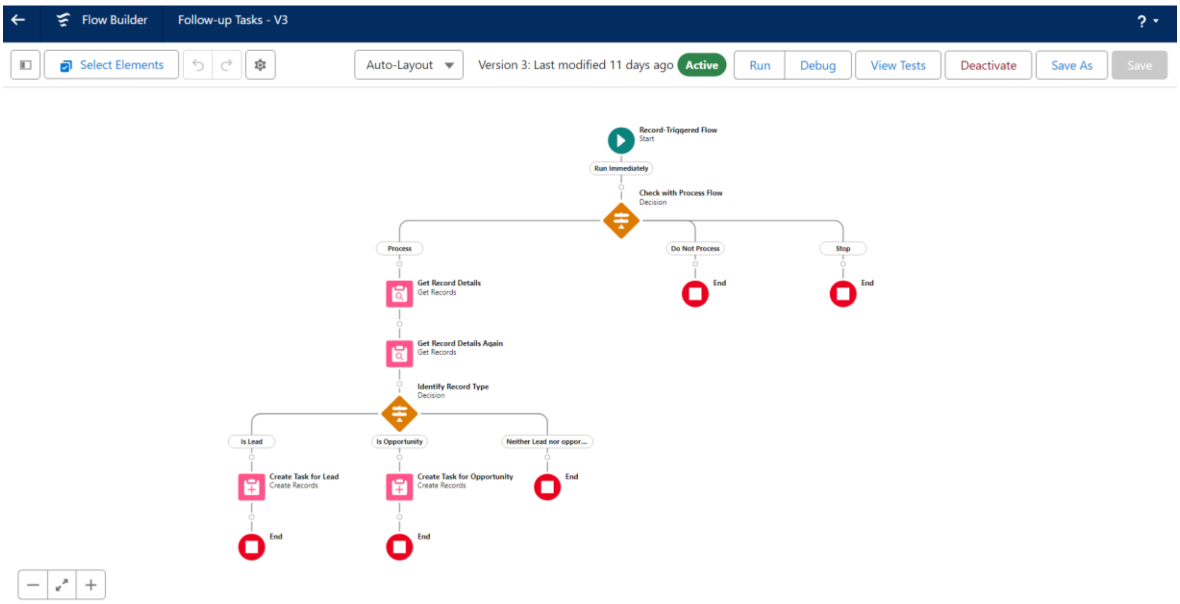
33 items • Sorted by Account Name • Filtered by All accounts • Updated a few seconds ago

Search this list...

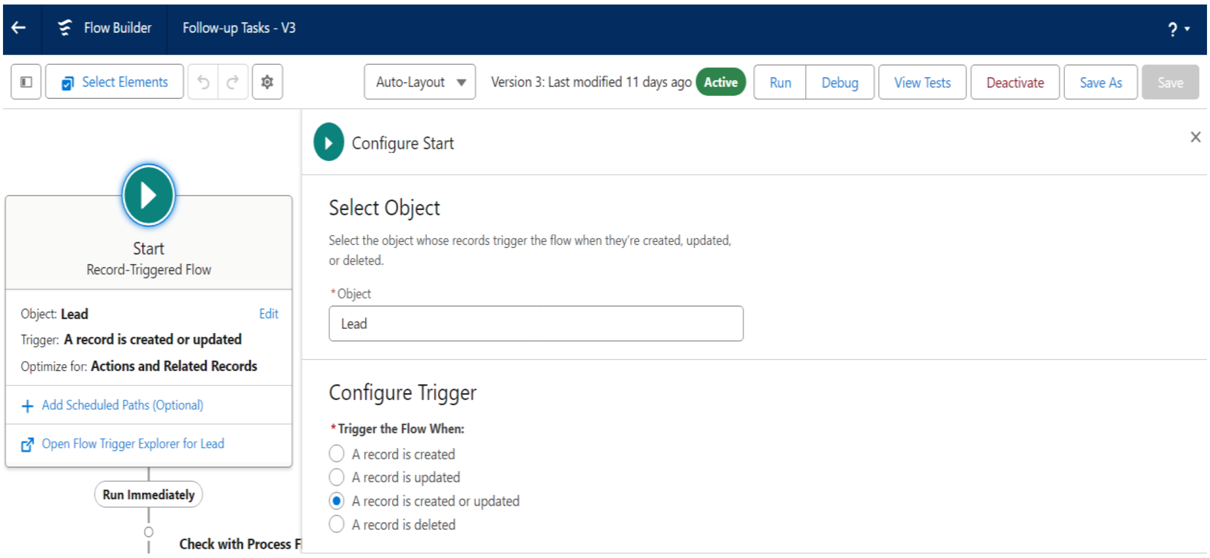
		Account Name ↑	Account Site	Billing State/P...	Phone	Type	Account Owne...	
1	☐	00QWS0000042Qgs2AE					MShar	▾
2	☐	00QWS0000042RrR2AU					MShar	▾
3	☐	00QWS0000042S9B2AU					MShar	▾
4	☐	00QWS0000042Sh32AE					MShar	▾

Similarly, accounts are created using this flow.

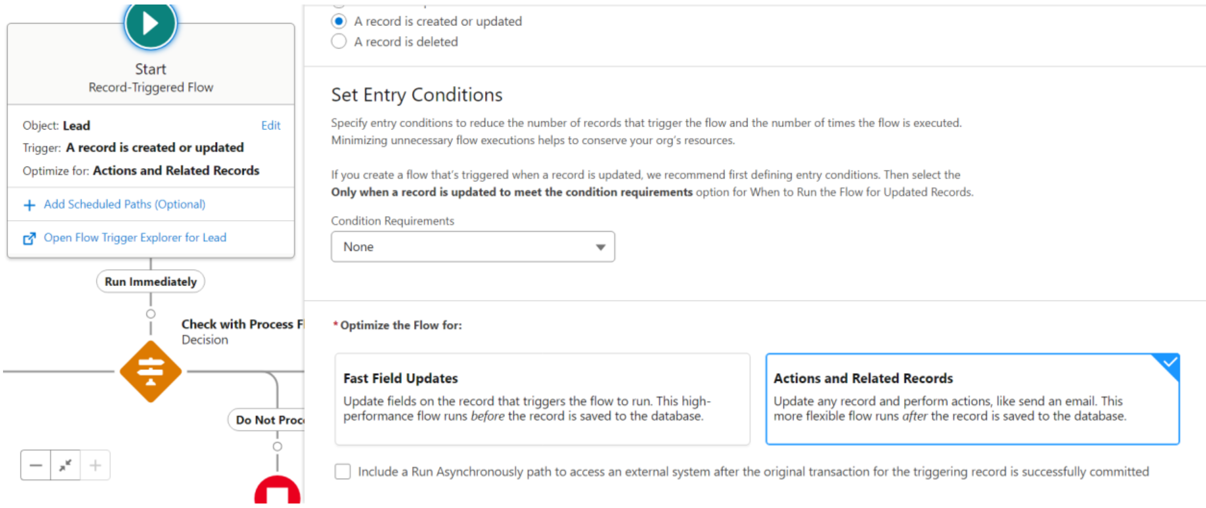
- Follow-Up Tasks: - This flow will create tasks for sales reps to follow up on high-priority leads and opportunities.



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

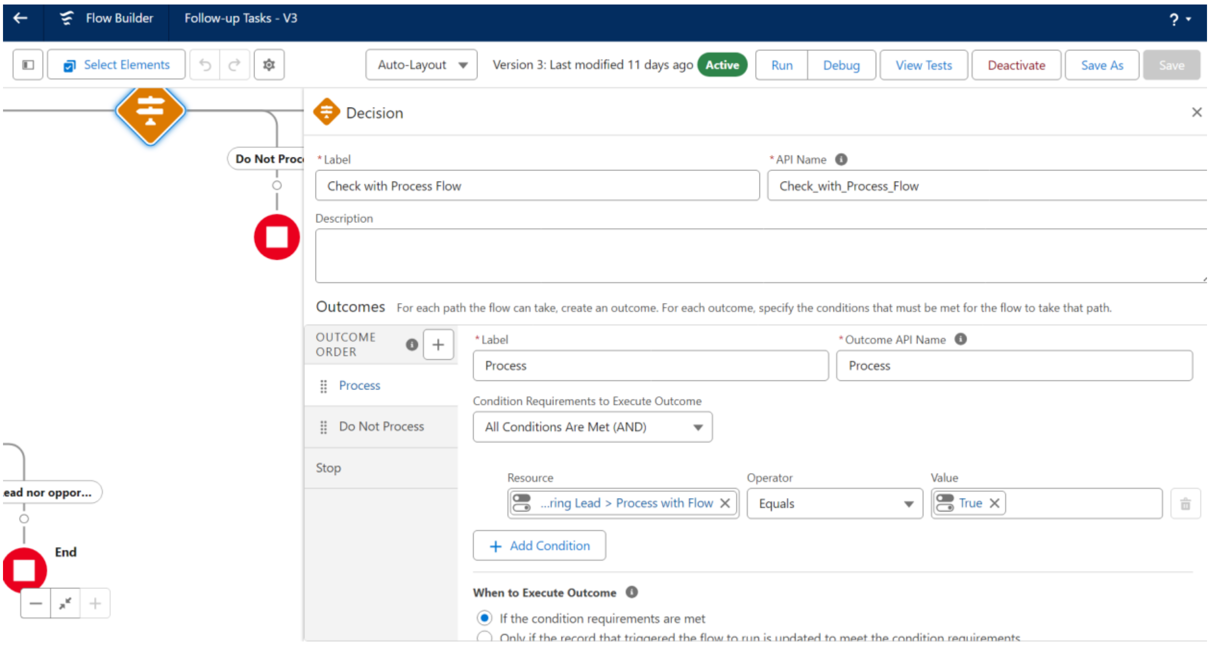


There are no conditional requirements and the flow will be optimized for Action and Related Records

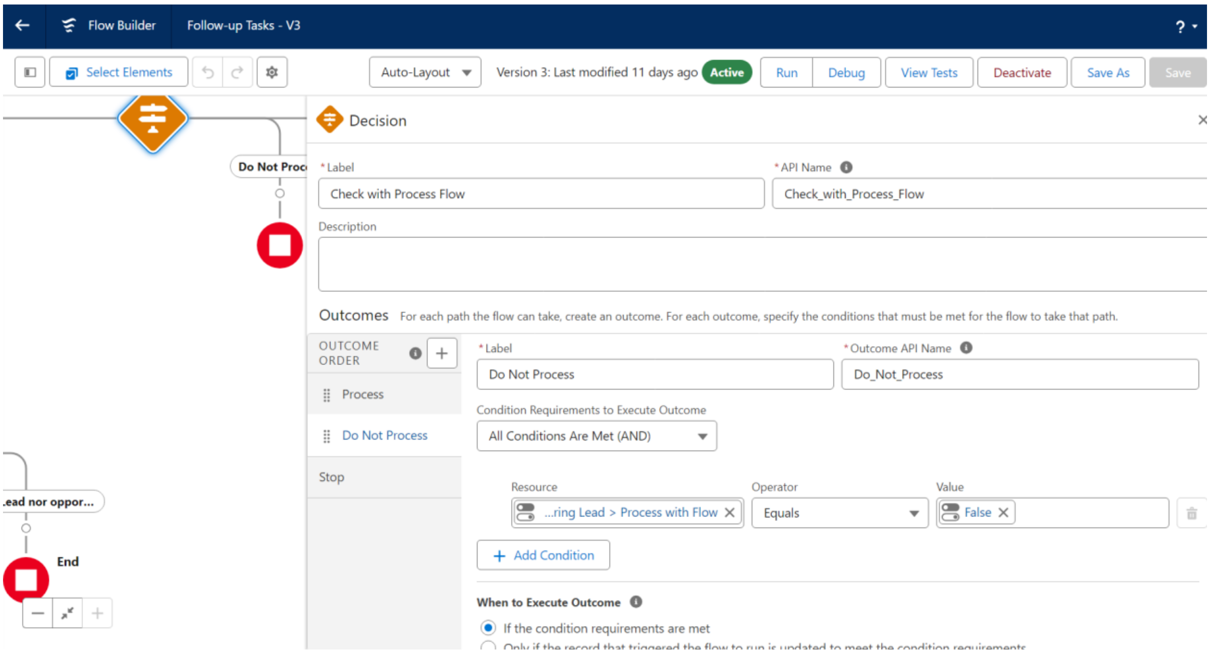


So firstly, the decision will be made whether Process with Flow of Lead is true or not.

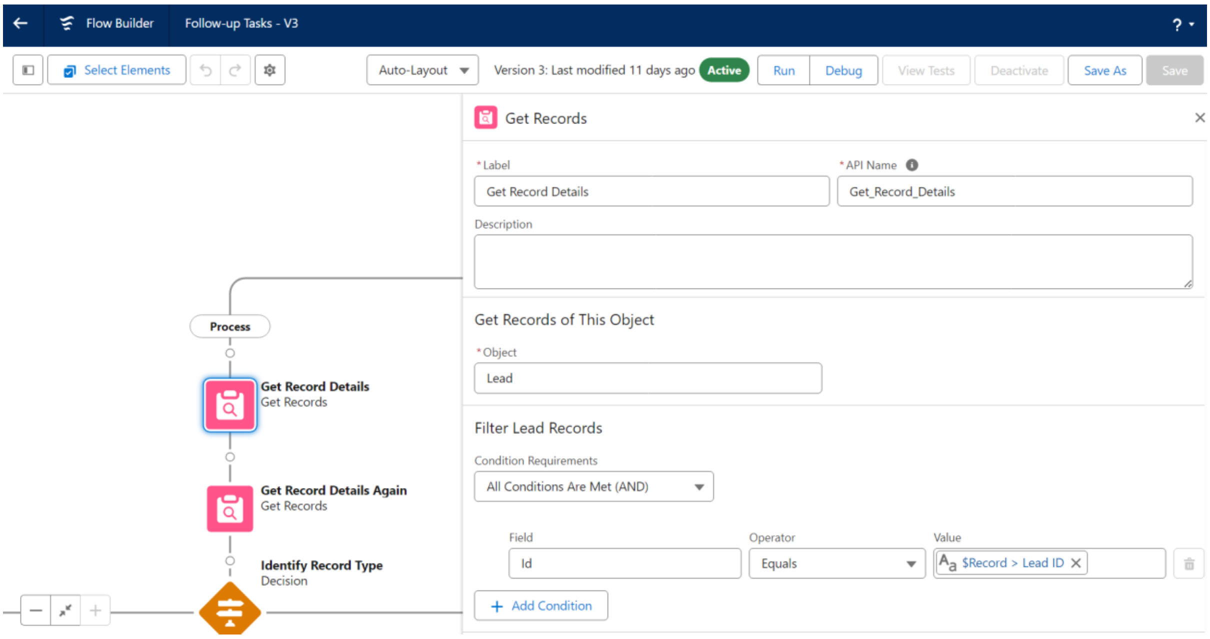
If the process with flow is true, then it will move forward



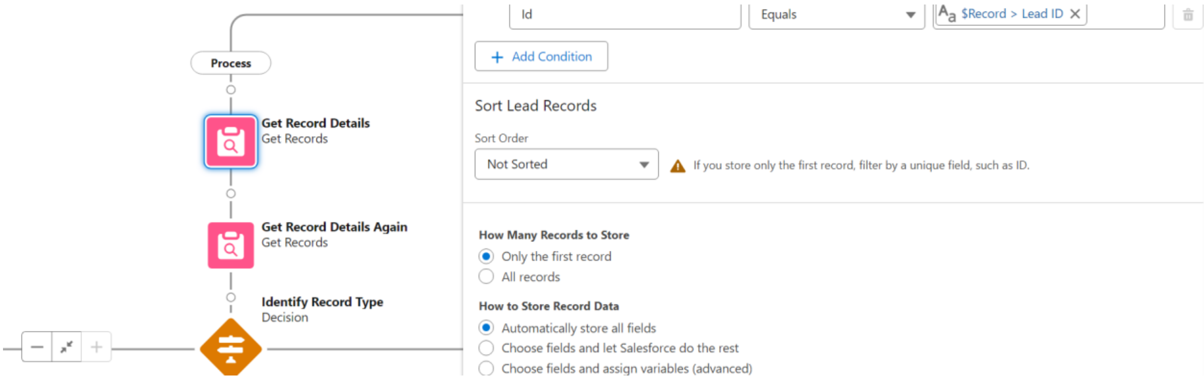
If the process with flow is false, then it will not move forward



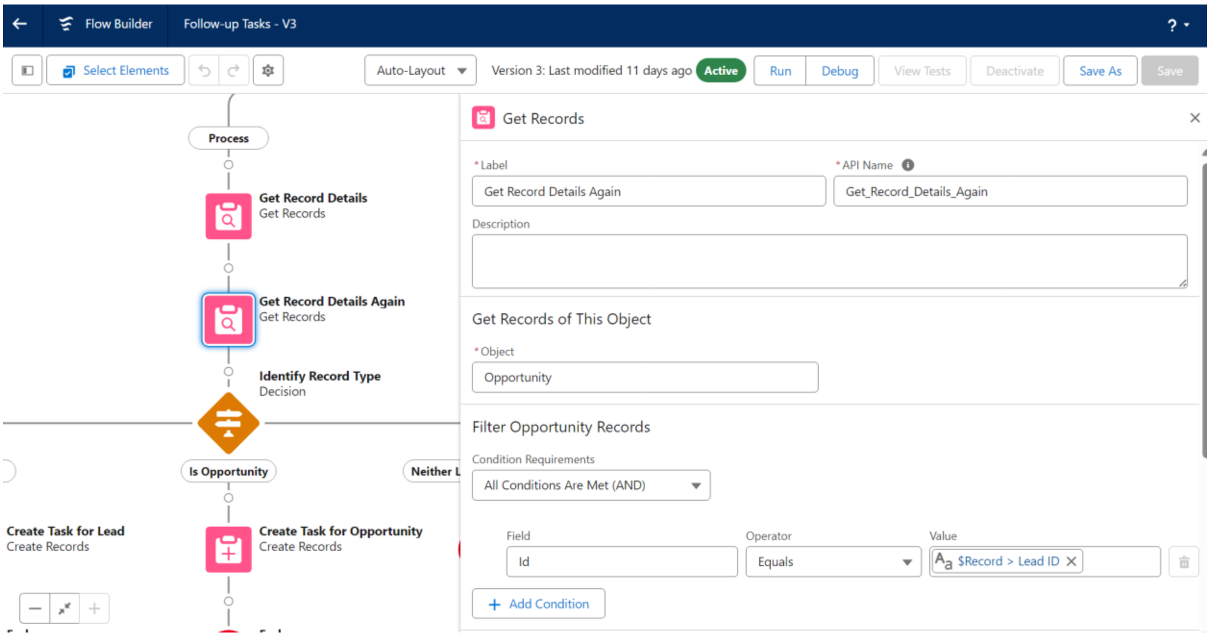
So firstly, record details will be collected for the object lead where the condition is Id is equal to Lead ID (Record ID).



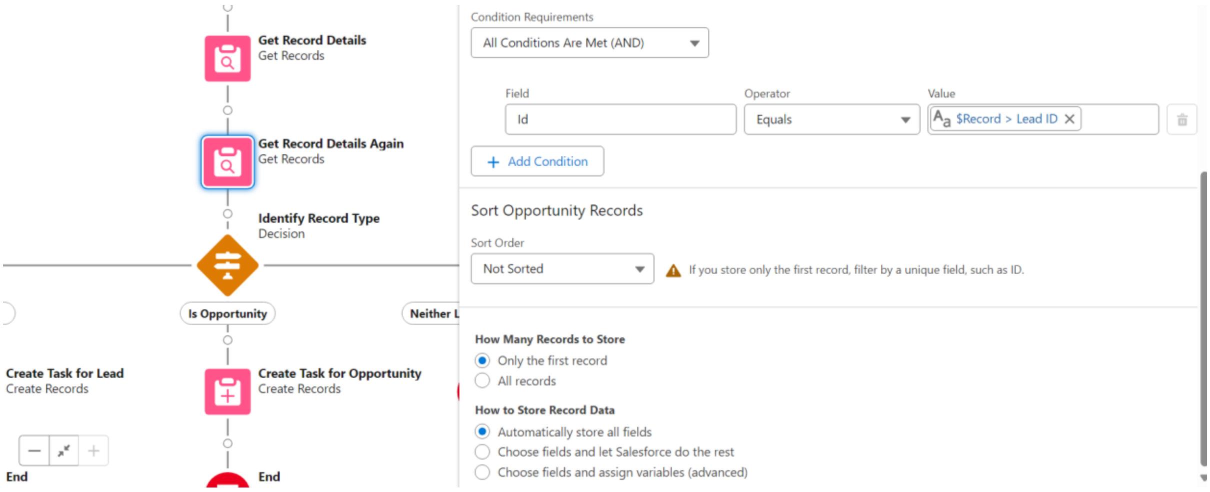
It will only store the first record, and all the fields will be store automatically.



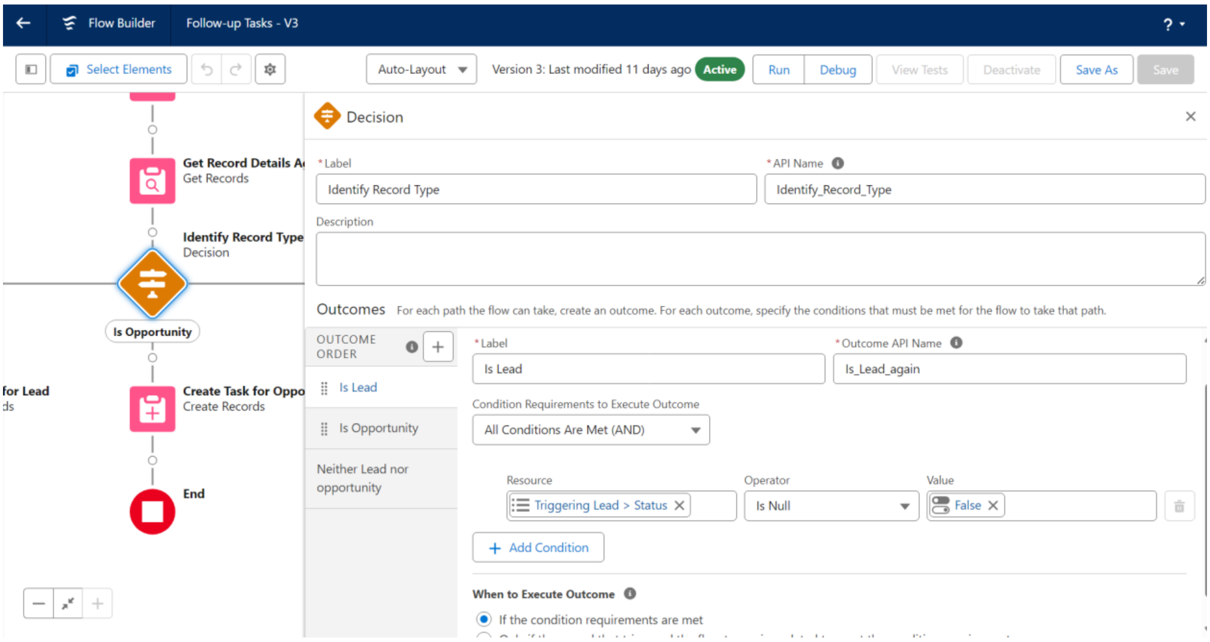
Again, record details will be collected for the object Opportunities where the condition is Id is equal to Lead ID (Record ID).



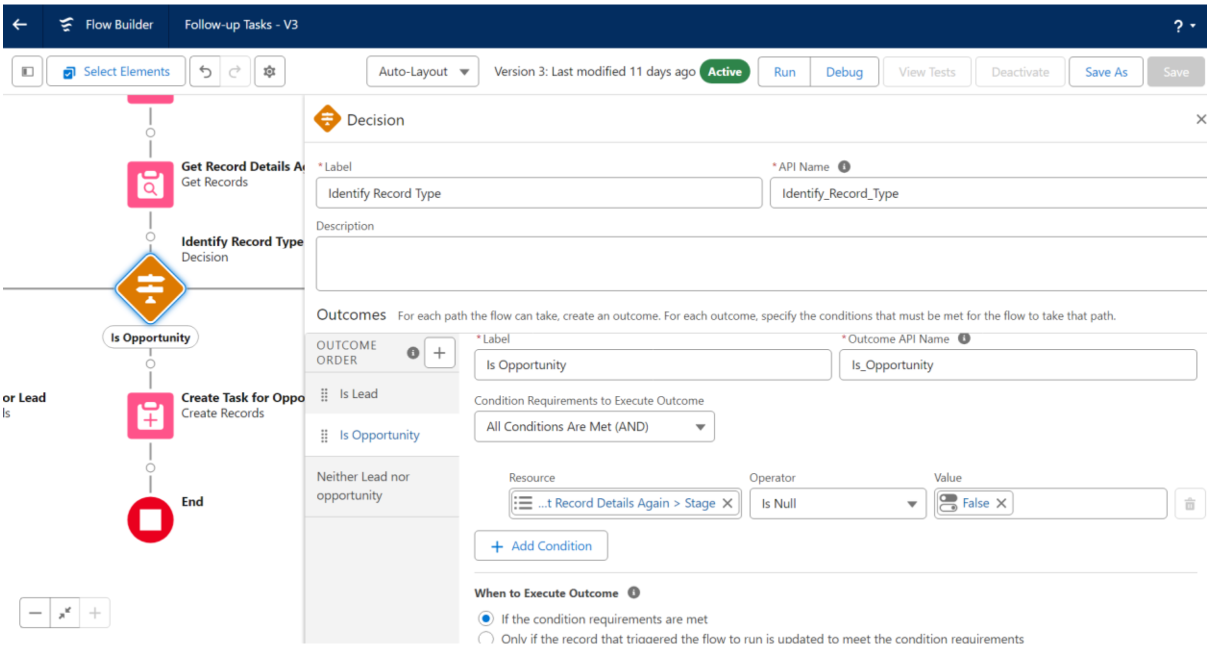
It will only store the first record, and all the fields will be store automatically.



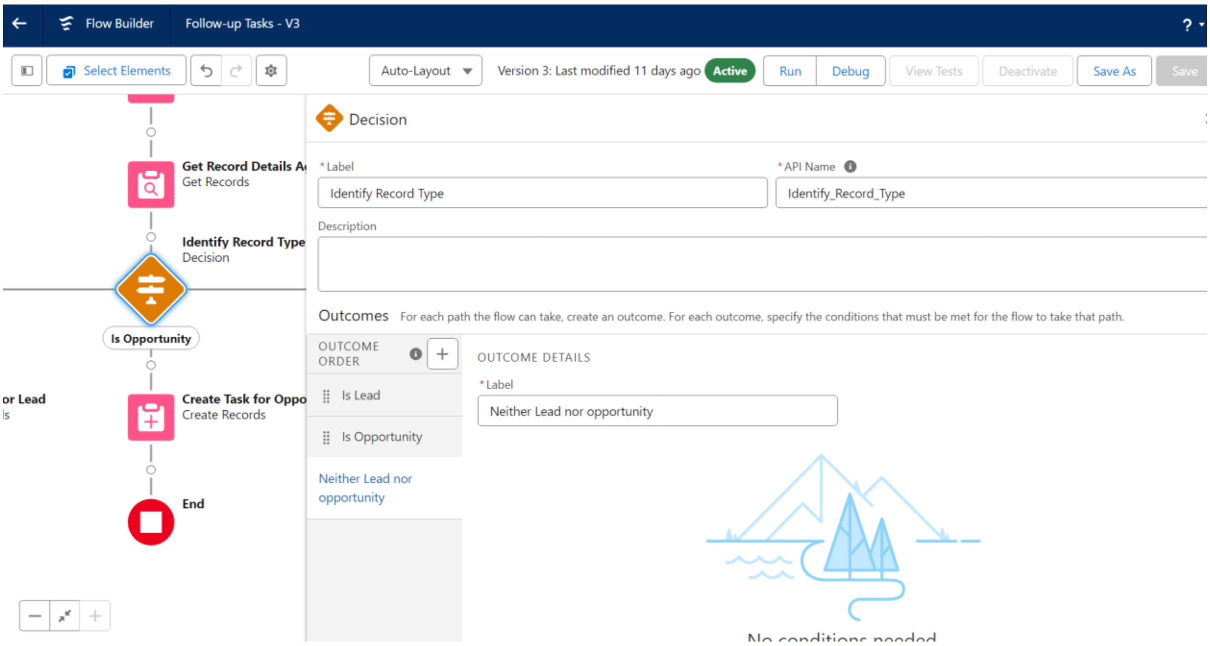
So, the decision will be made whether the record type is lead or opportunity. To check whether the record type is lead or not, condition is that the status of the lead should not be null, and outcome will execute if the condition requirements are met.



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.

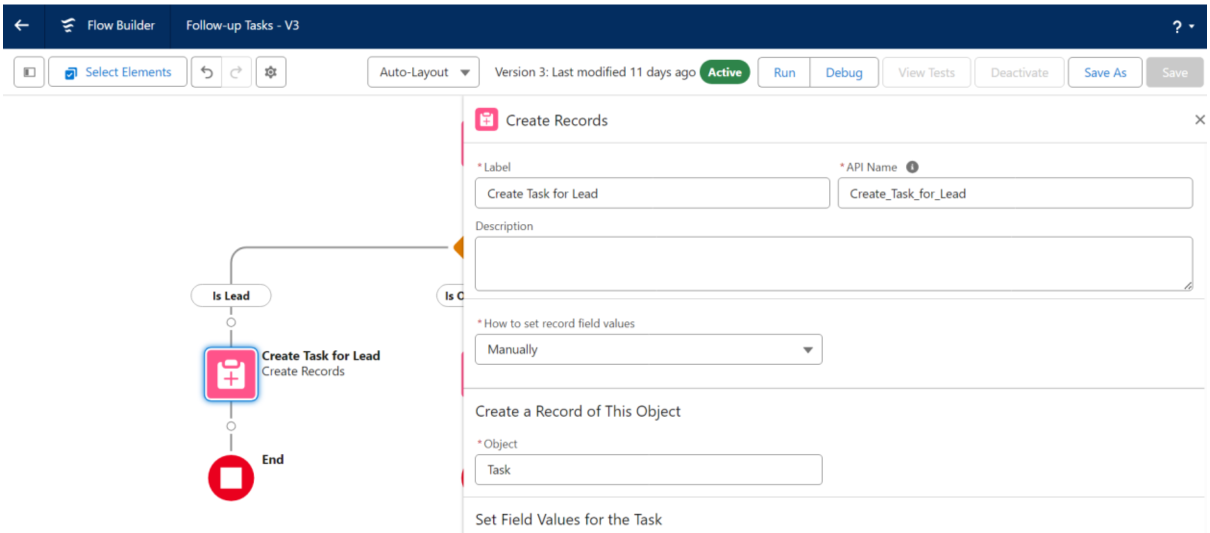


If the record type is neither lead nor opportunity, no action will be taken.



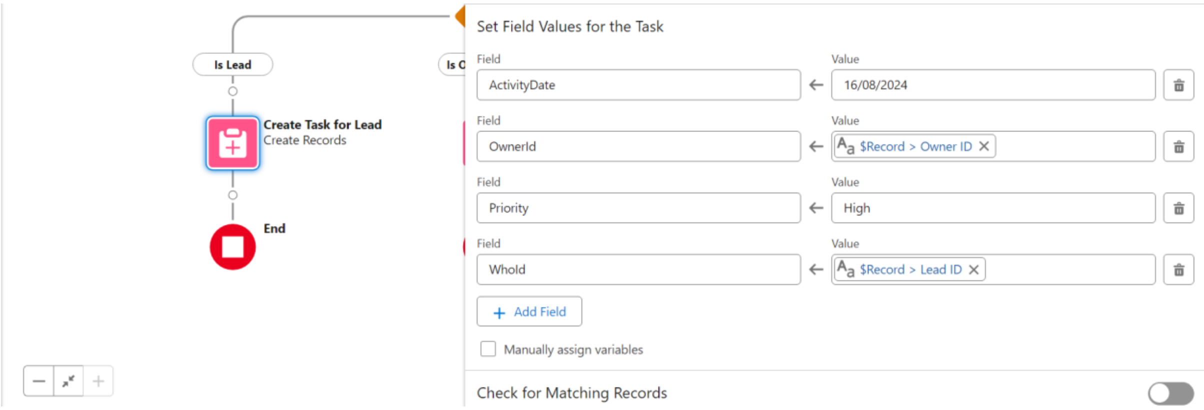
If the record type is lead i.e. lead status is not null, then the records will be created where the record field values will be set manually.

The object will be the task.



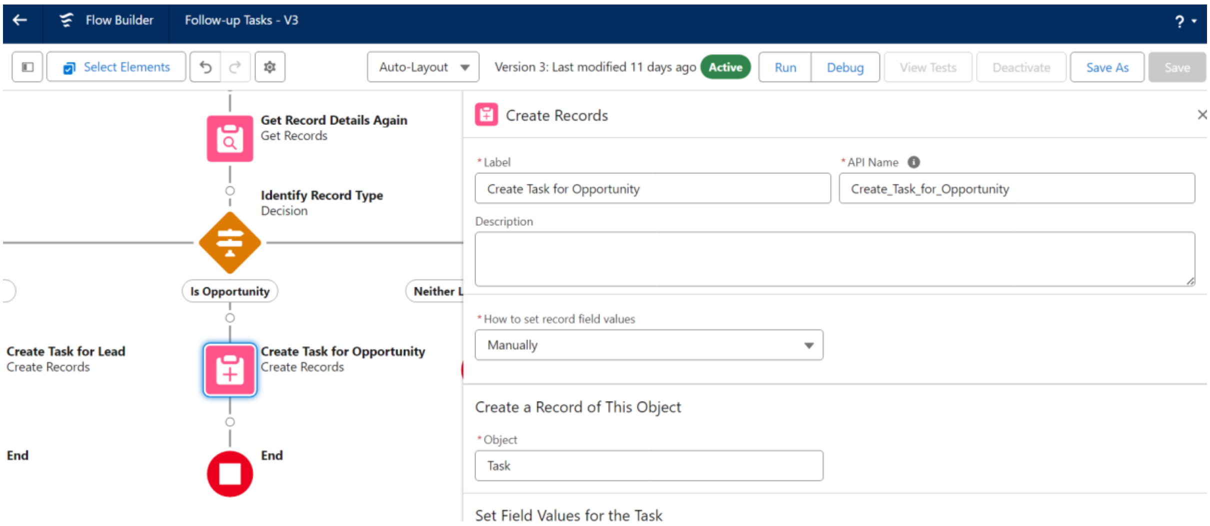
In this case, the field values need to be set manually,

Activity Date: - It should be the deadline however in this case it is 16/08/2024
Field: - Owner ID
Priority: - High
WhoId: - 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.



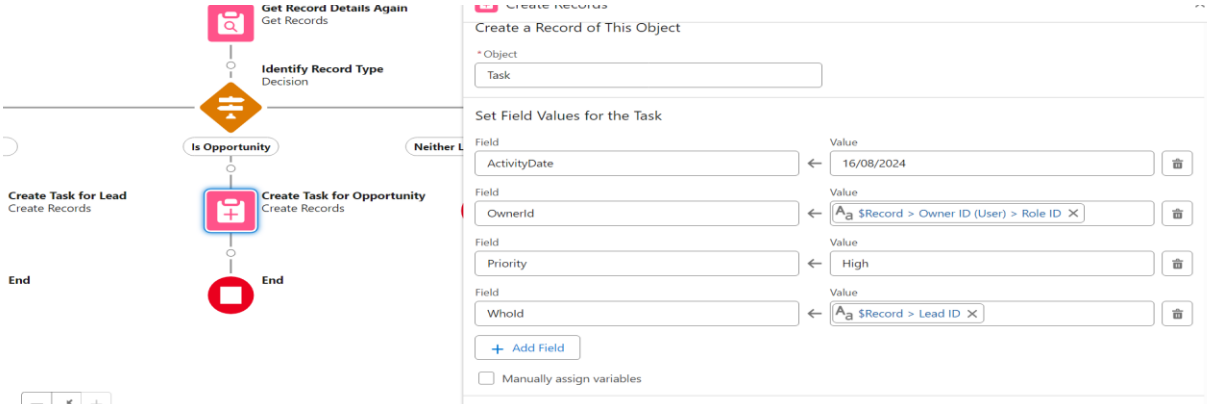
In this case, the field values need to be set manually,

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

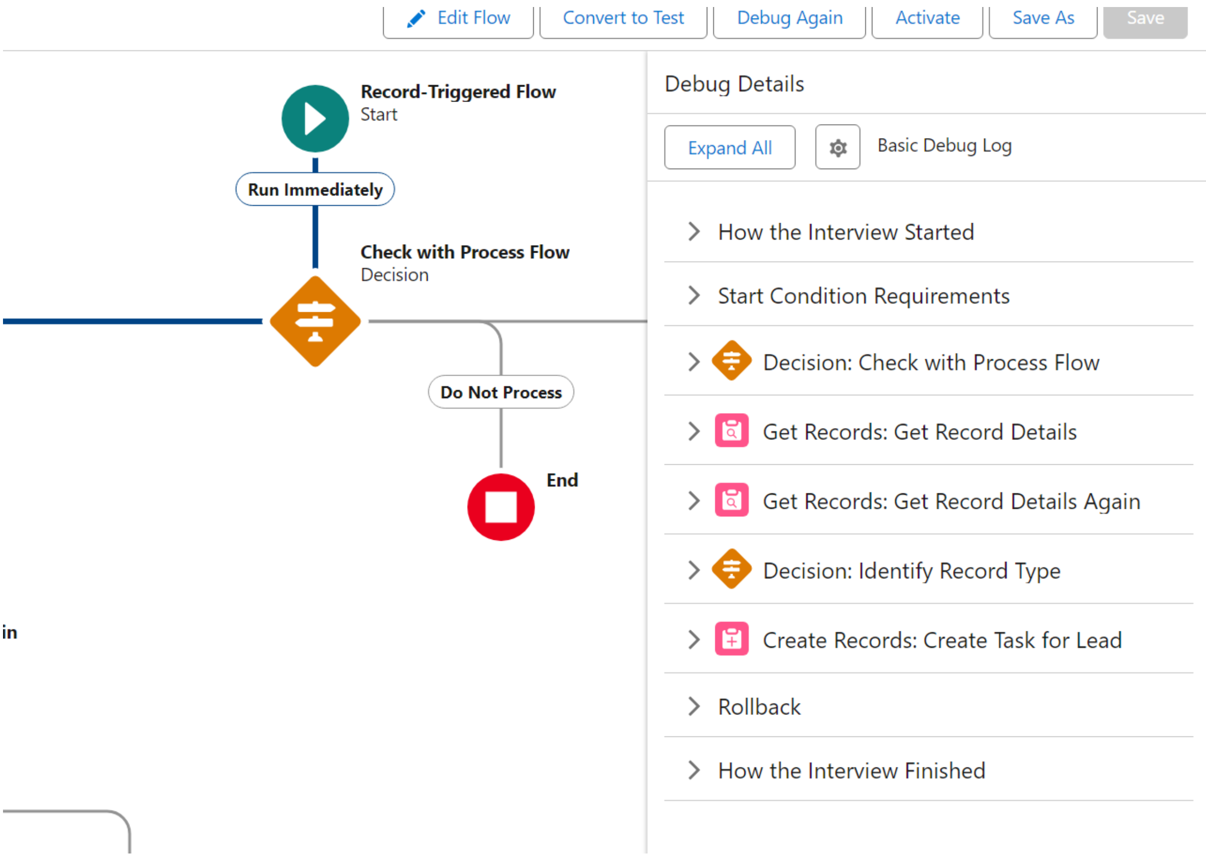
Field: - Owner ID

Priority: - High

WhatId: - Lead ID

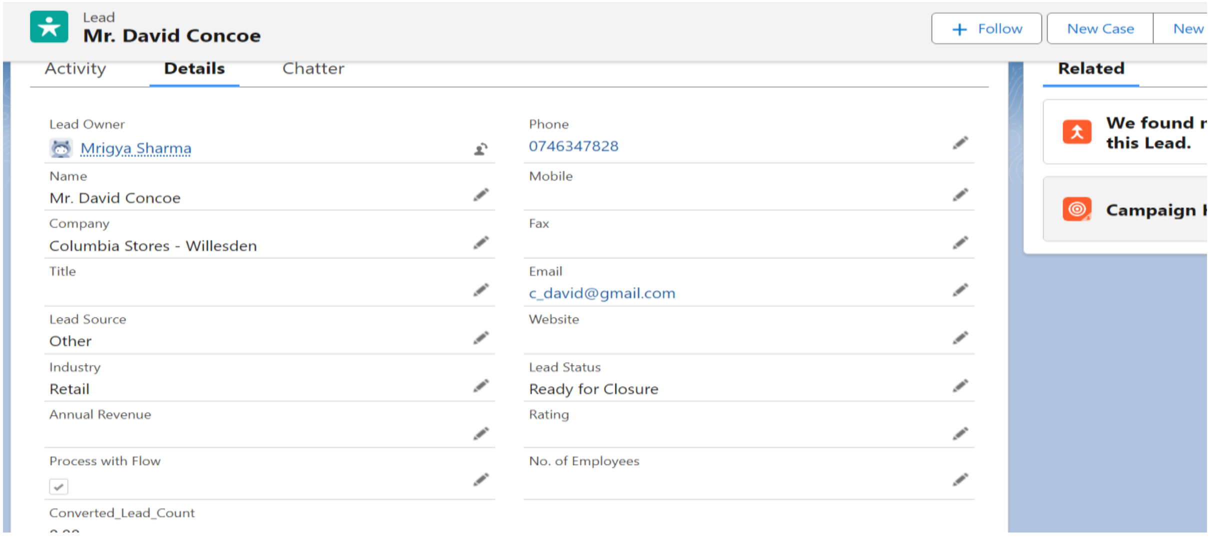


So now the flow will be debug, where I will select the lead and check the box of Process with the flow

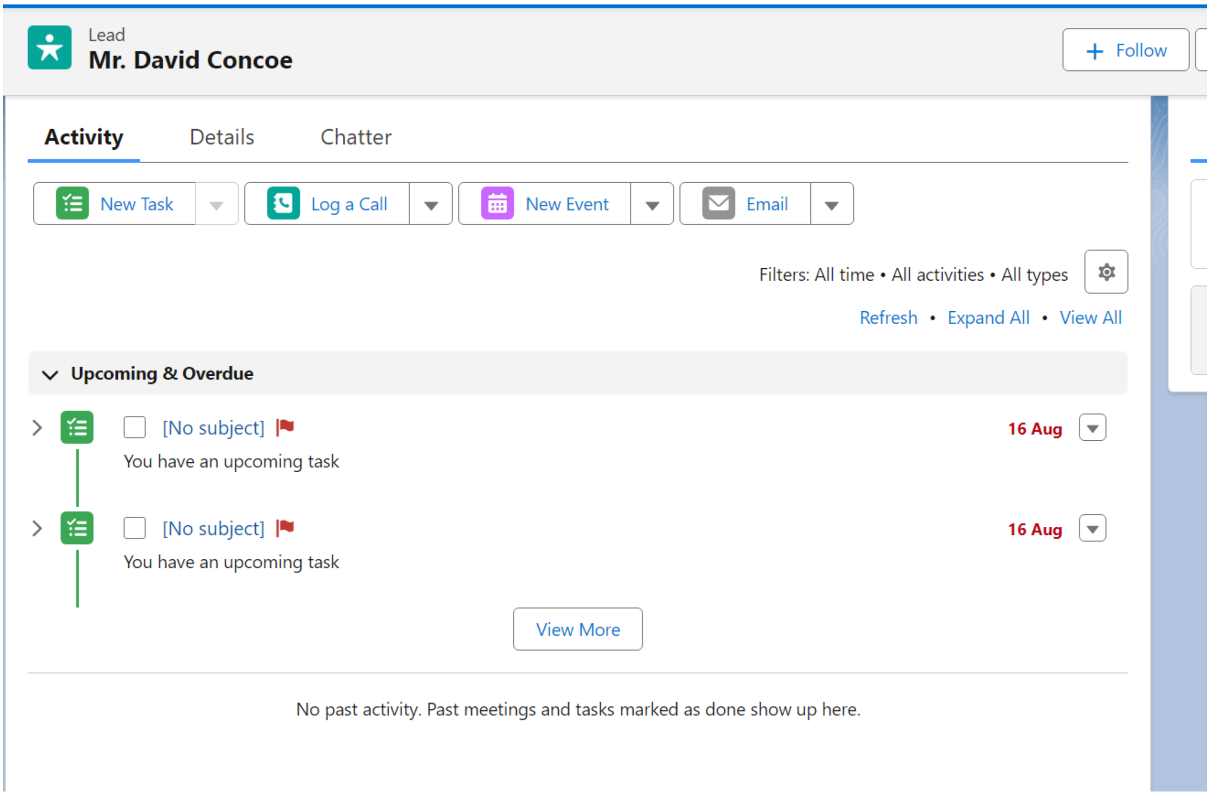


There are no errors, so the debug has been successfully executed.

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.

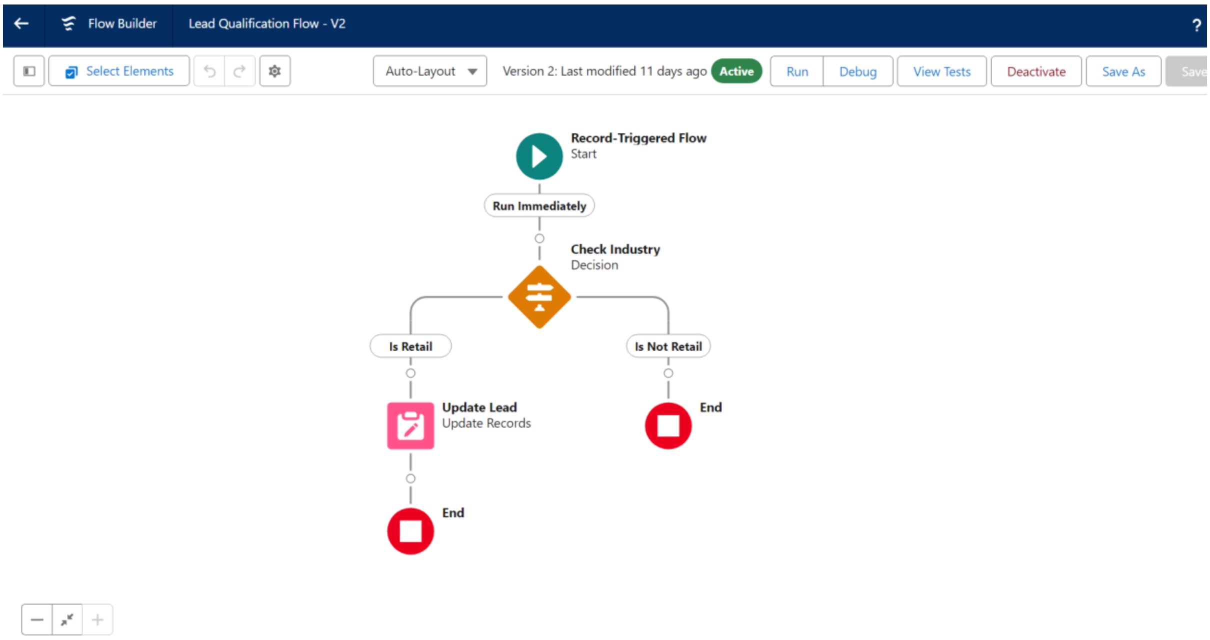


So, the task has been created automatically to follow up

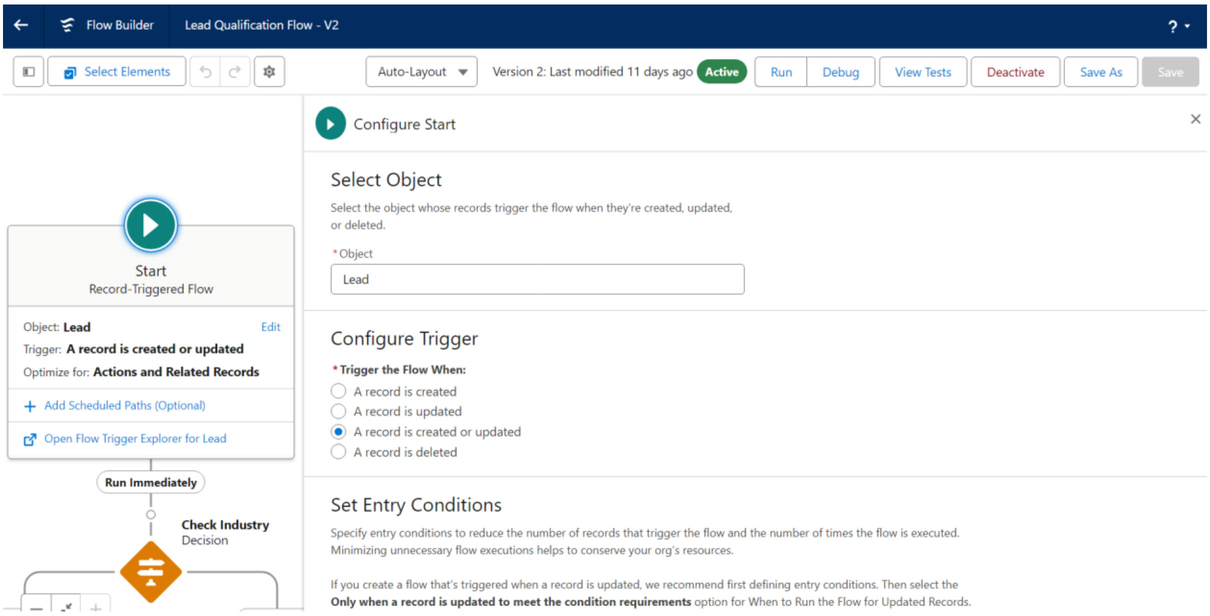


However the subject line is empty, it can be set up under create records section under the set-up values of the field manually.

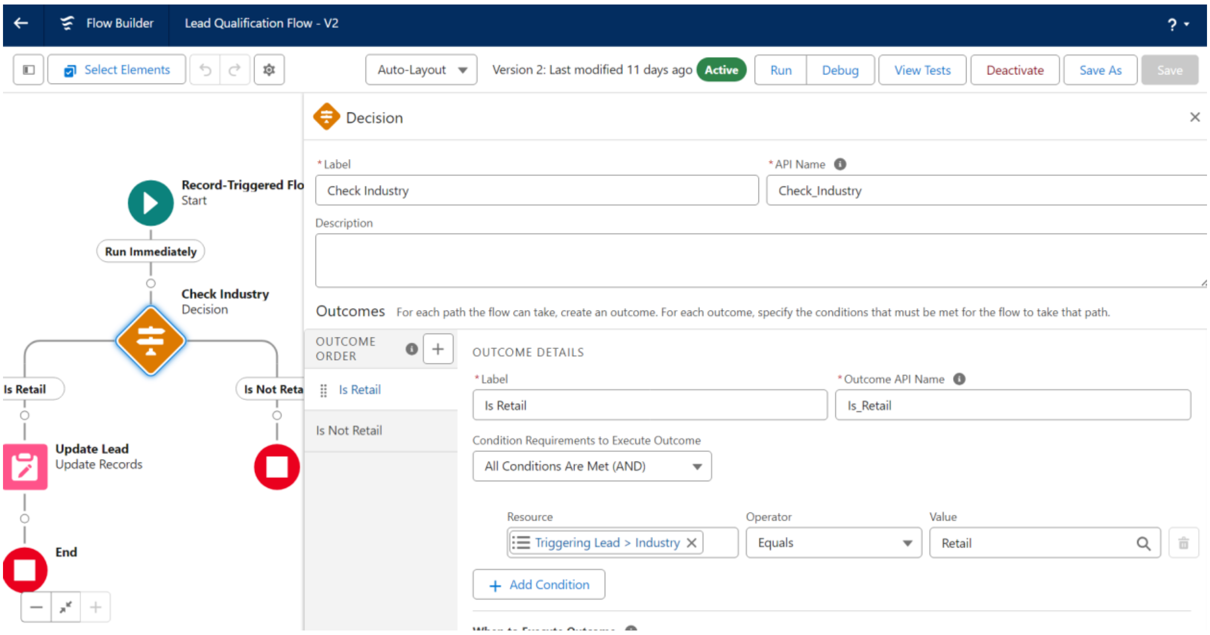
- Lead Qualification Flow: - Guide users through a series of steps to qualify leads based on predefined criteria. In this case, the flow will work when industry will be retail.



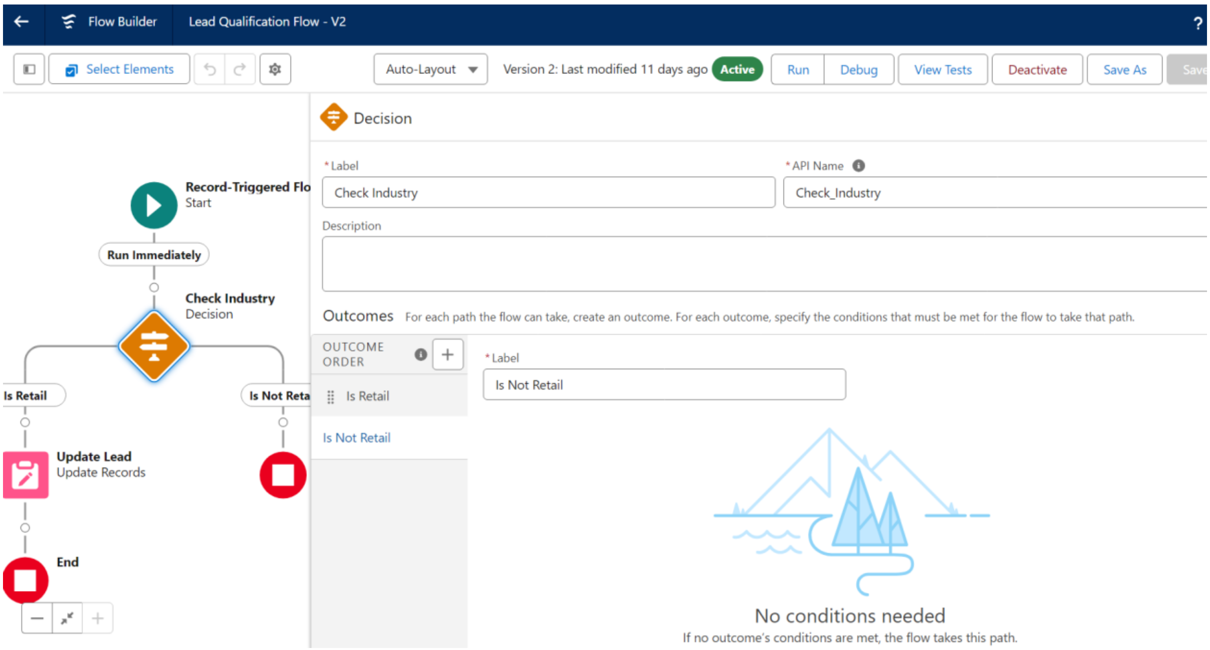
The object is set to Lead, and the trigger will work when the record is created or updated. There are no condition requirements.



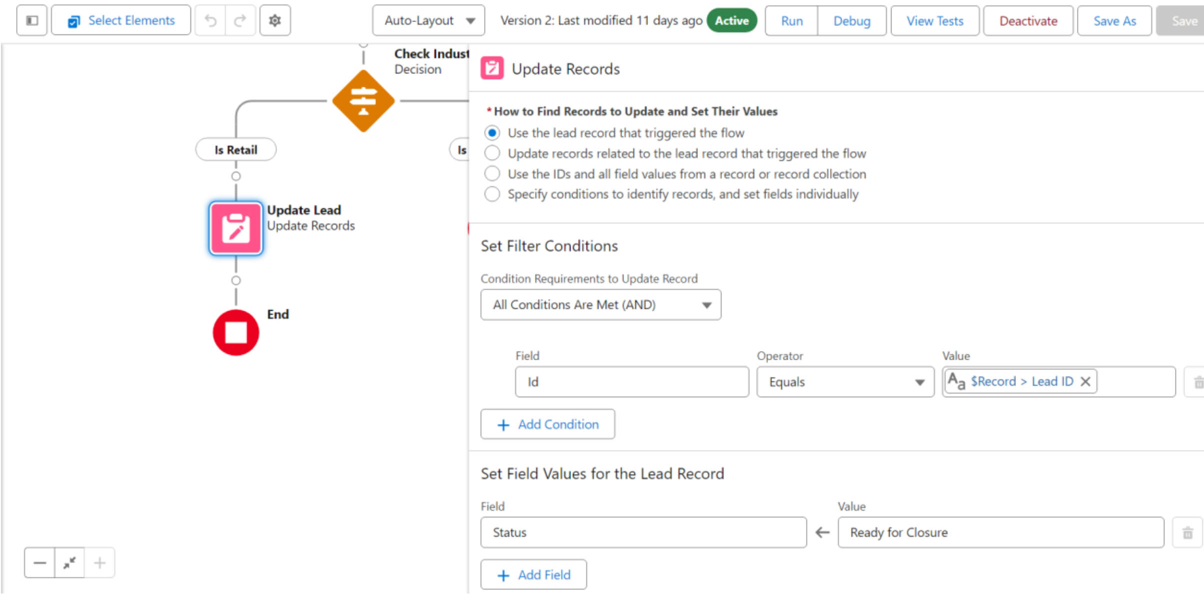
To check whether the industry is retail or not, the condition is set that industry type should be equal to Retail.



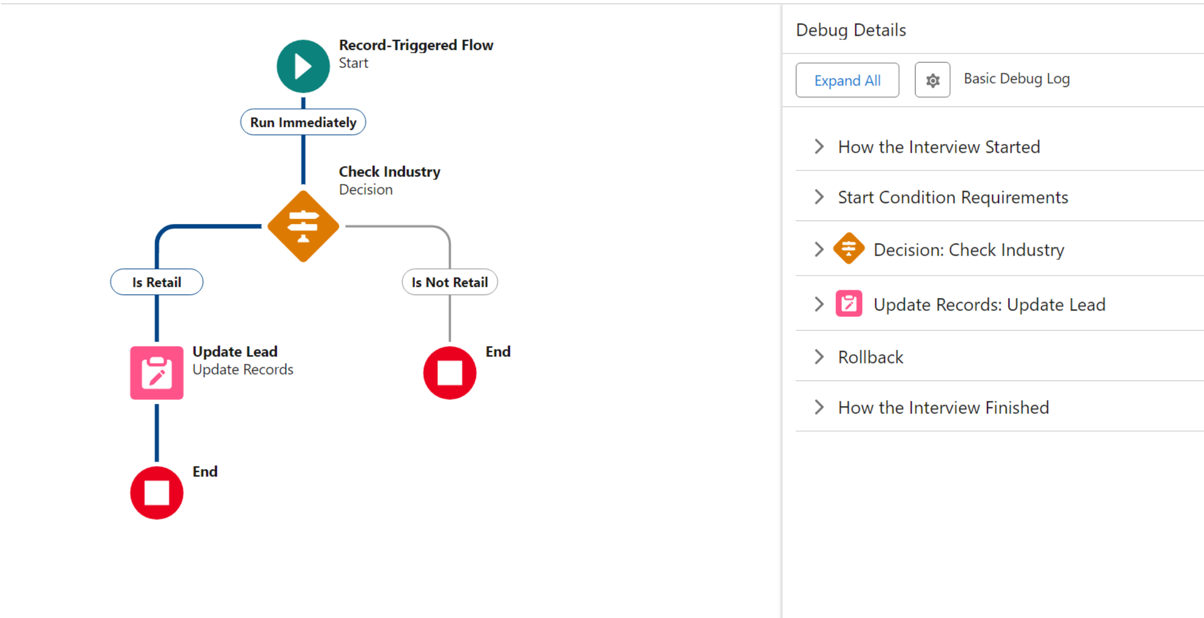
There won’t be any further action taken if retail is not industry.



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.



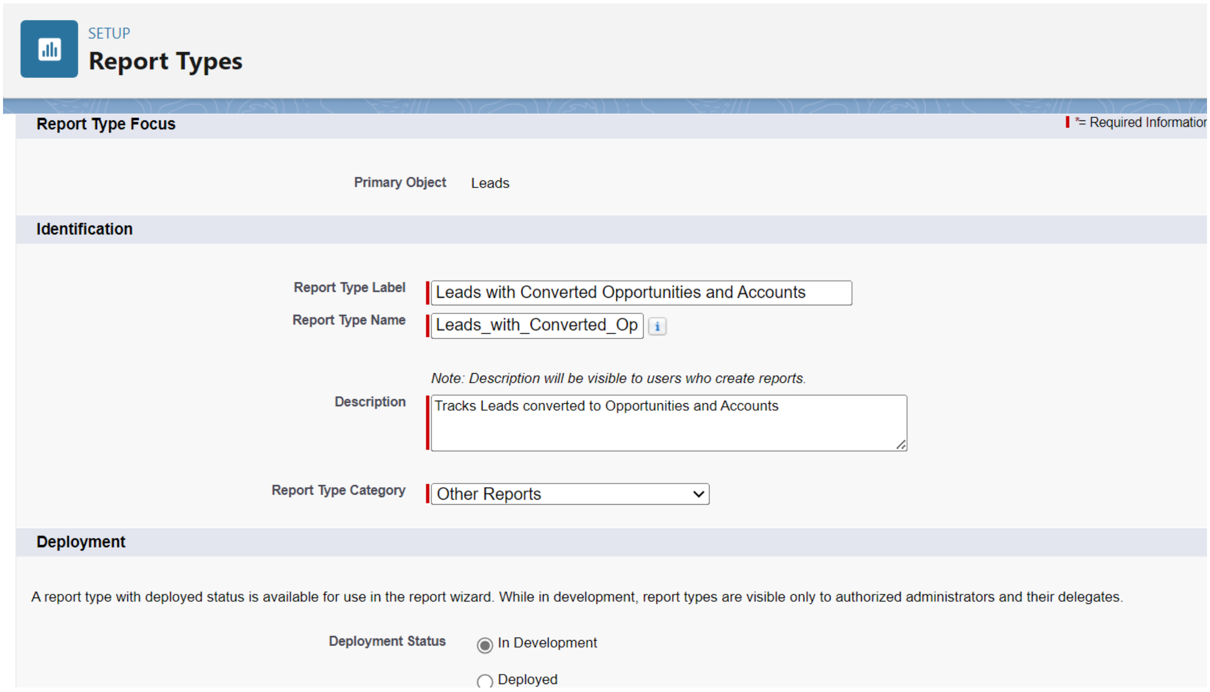
The flow has been debugged. There were no errors, so the flow is working successfully.



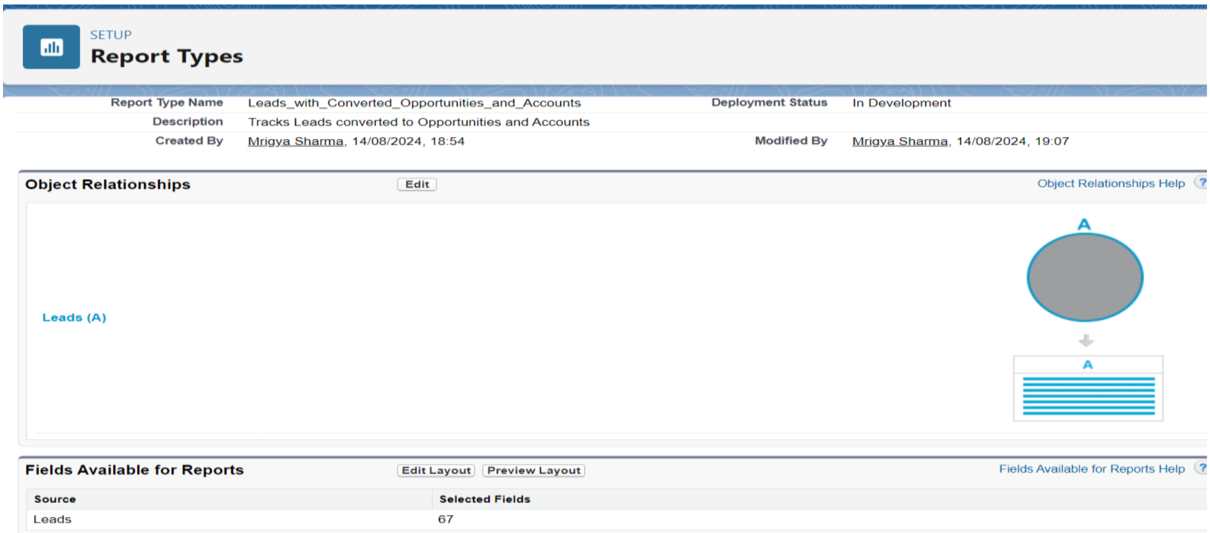
3) Reports and Dashboards:-

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

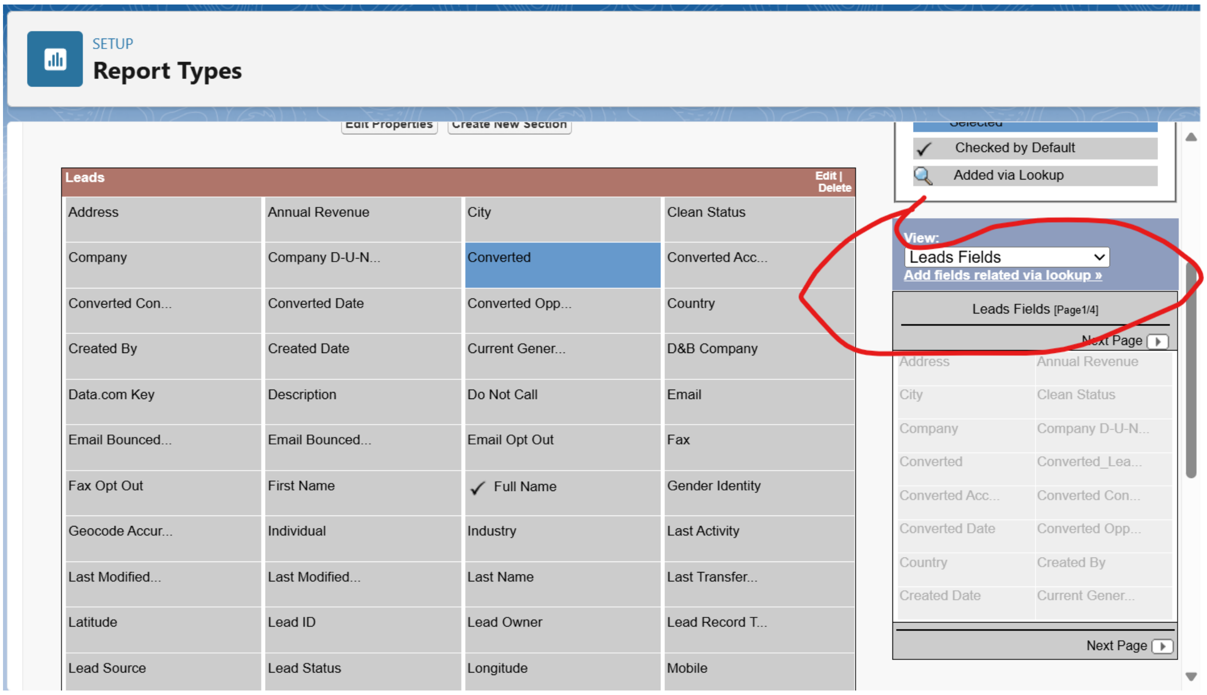
Firstly, new custom report needs to be created. The primary object will be Leads and the label of Report Type will be Leads with Converted Opportunities and Accounts.



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

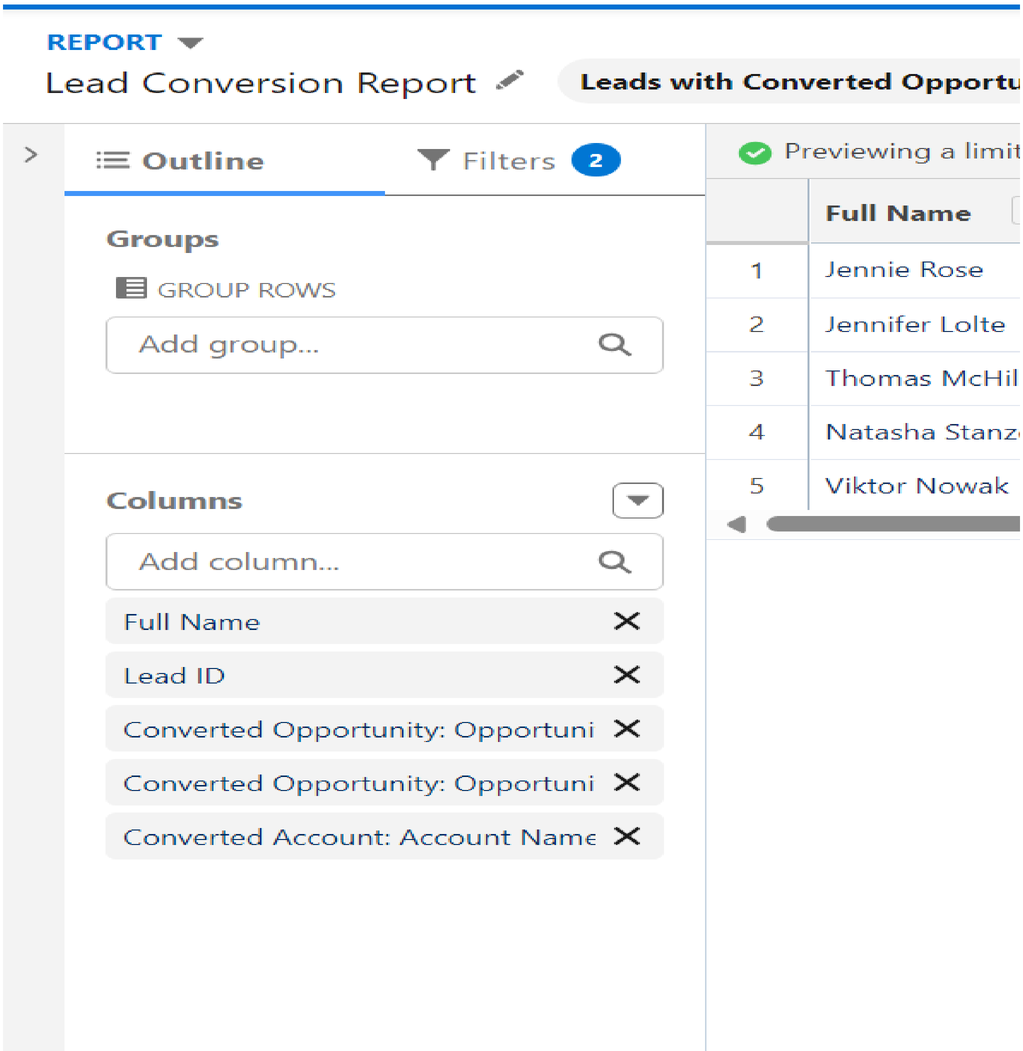


Under Edit Layout, the fields will be selected via add fields related via lookup

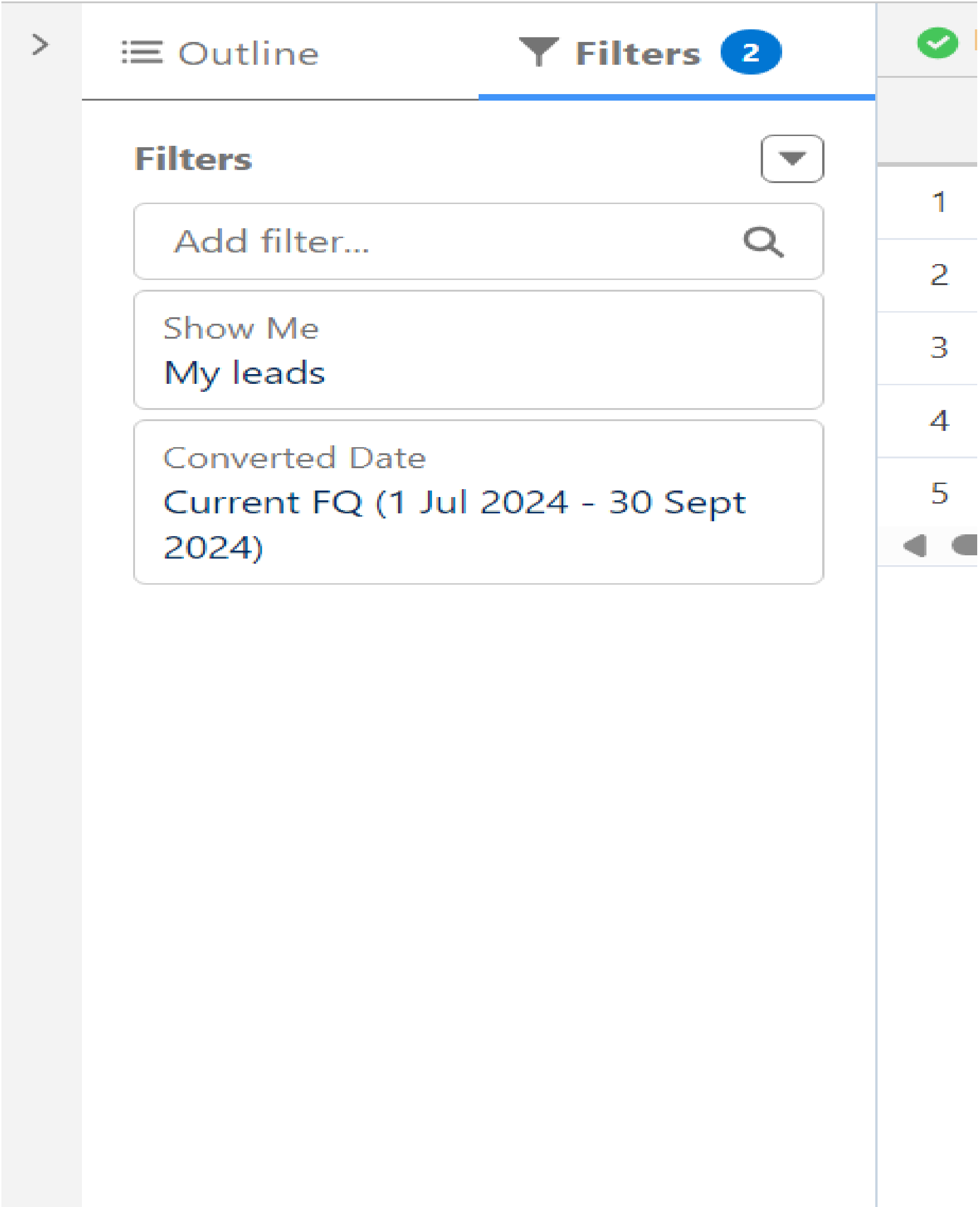


This layout will be saved.

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



The columns have been filtered by some conditions shown below

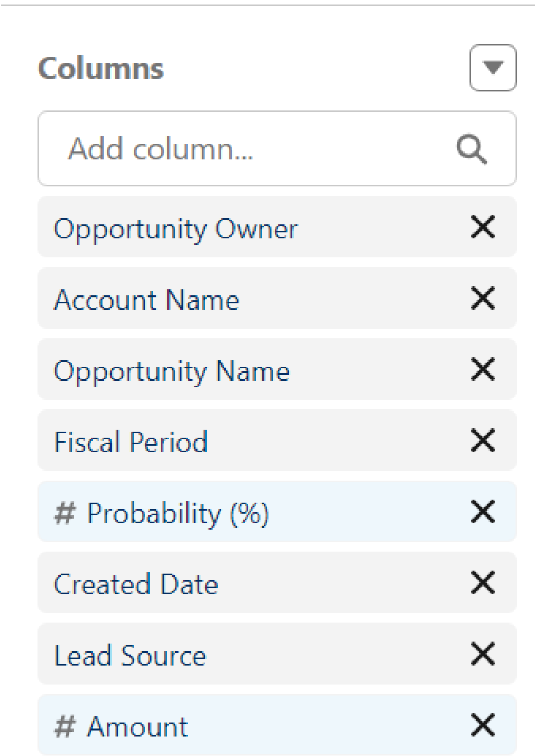


The Lead Conversion Report has been uploaded to GitHub folder.

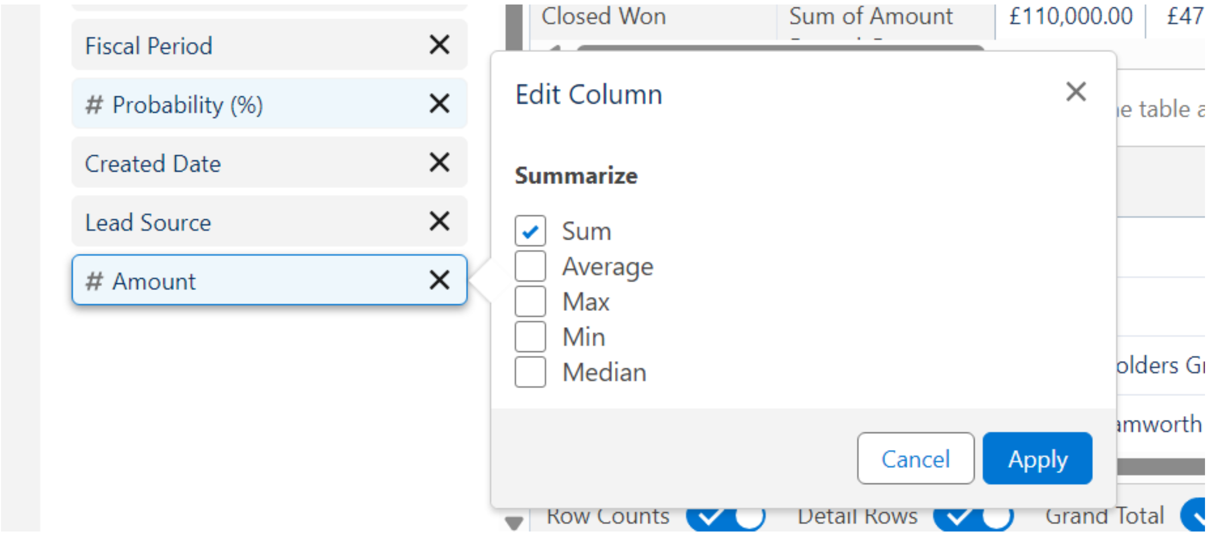
- Sales Pipeline Report: - This report visualizes opportunities by stage, amount and close date.

  Firstly, the report type will be of opportunities.

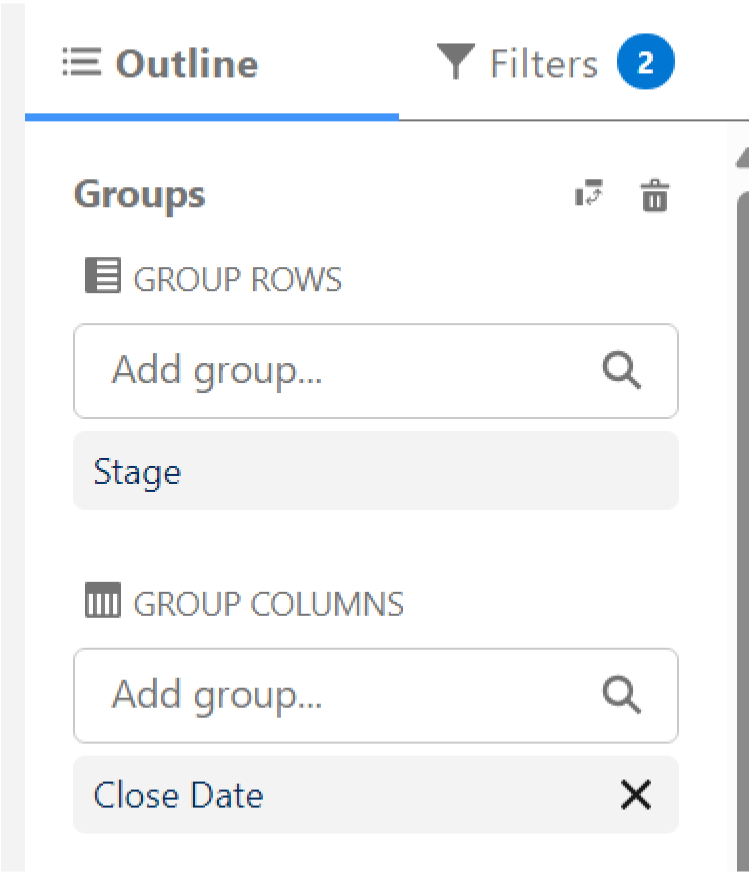
The following columns has been selected: -



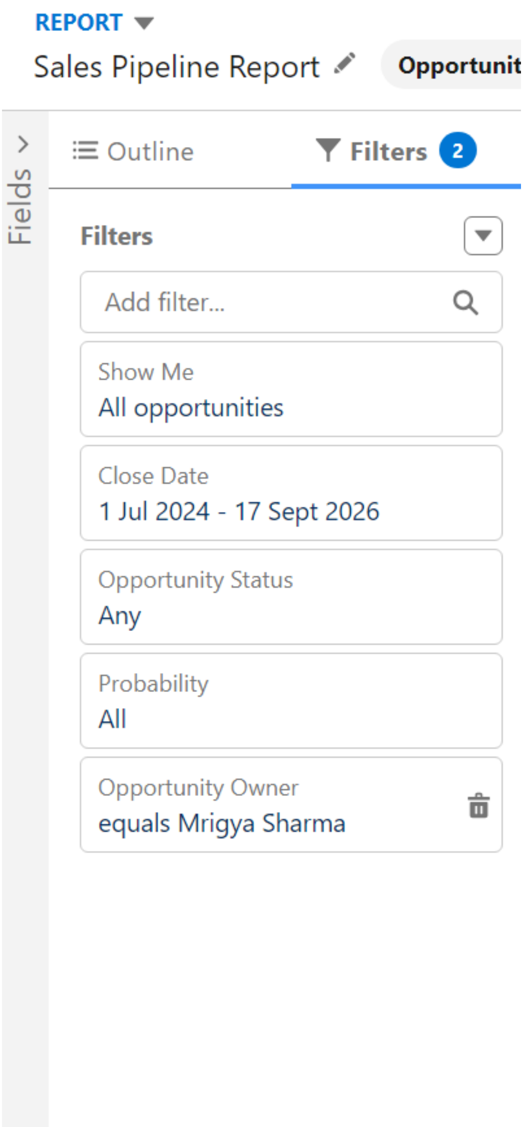
Where the amount has been summarized for opportunities.



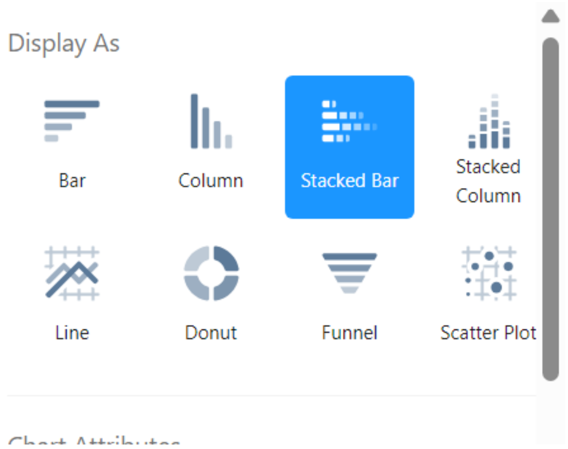
Next rows have been grouped by Stage and columns have been grouped by close date.



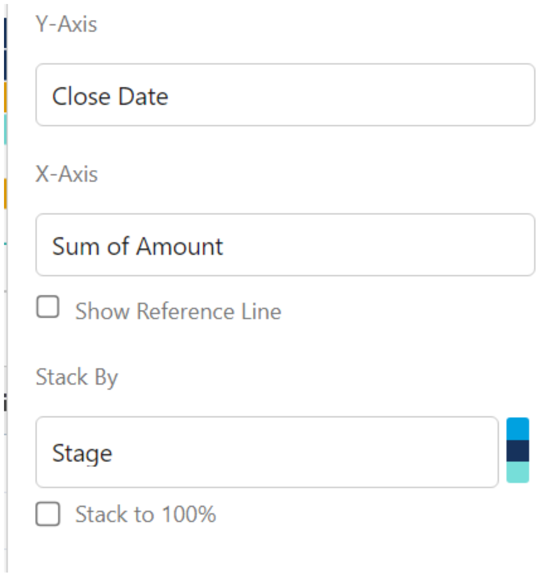
Also, these are the filters applied



For chart, we will choose stacked bar,

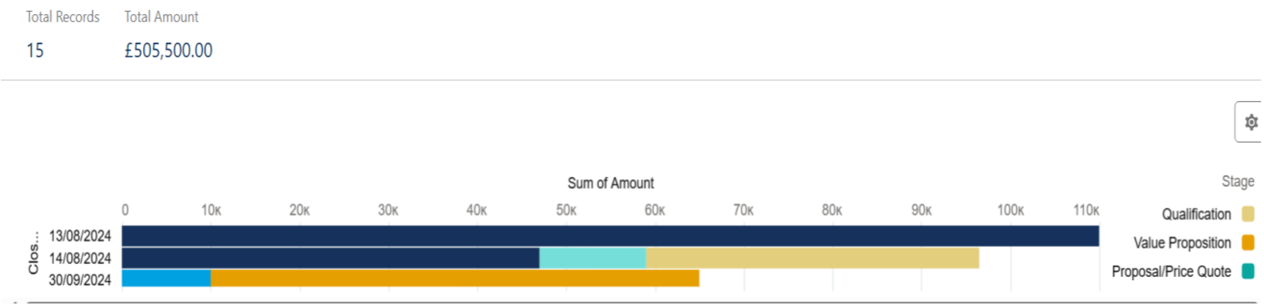


The object for Y-axis will be close date and object for x-axis will be sum of amount.



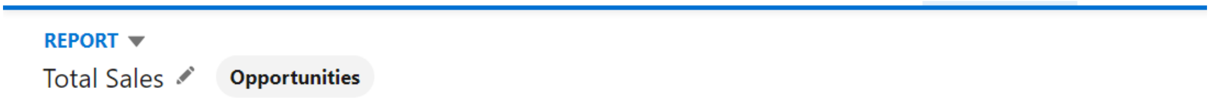
The final report is uploaded to the github folder under the name of Sales Pipeline Report.

However, this is the chart sample

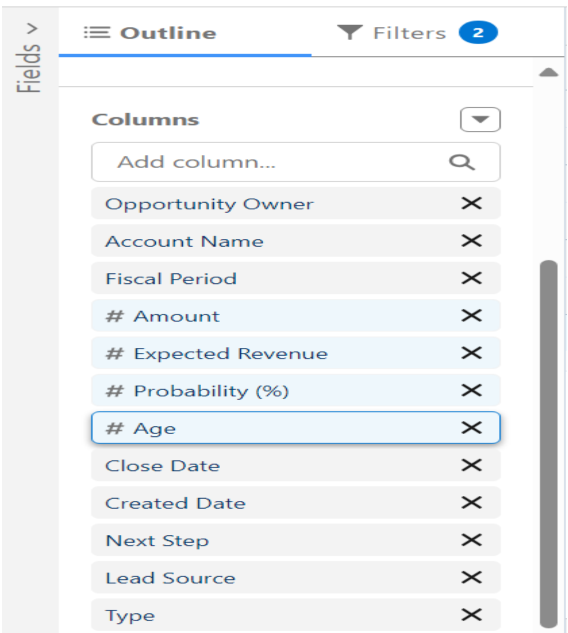


- Sales Performance Dashboard: - This dashboard displays key metrics such as total sales and win rates.

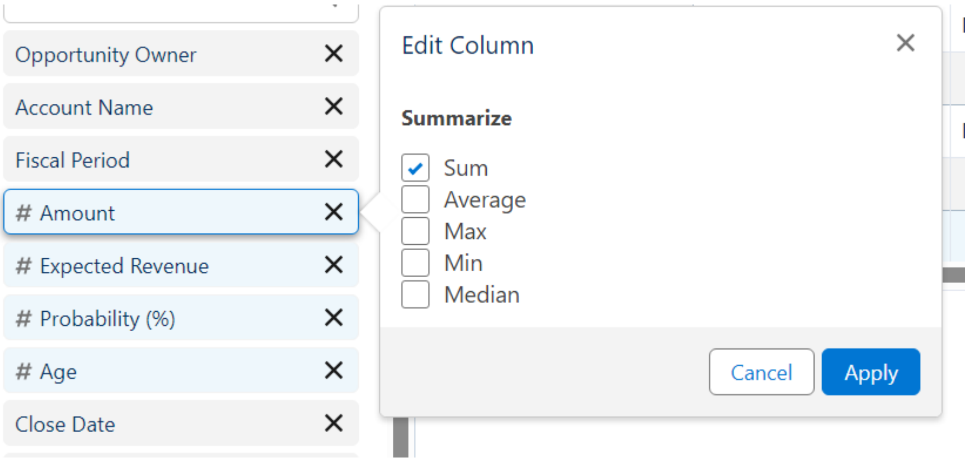
  Firstly, we will create a Report on Total Sales based on opportunities.



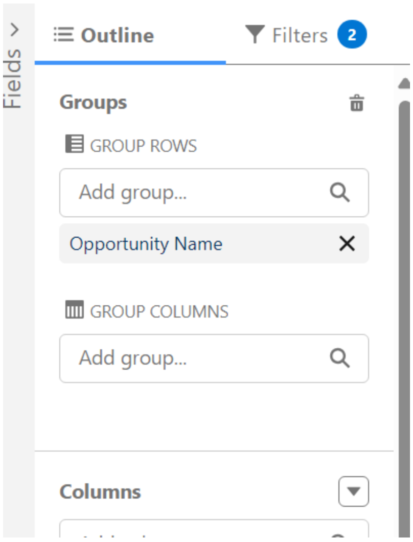
These following columns have been used.



The amount has been summarized



The columns have been grouped by Opportunity Name.

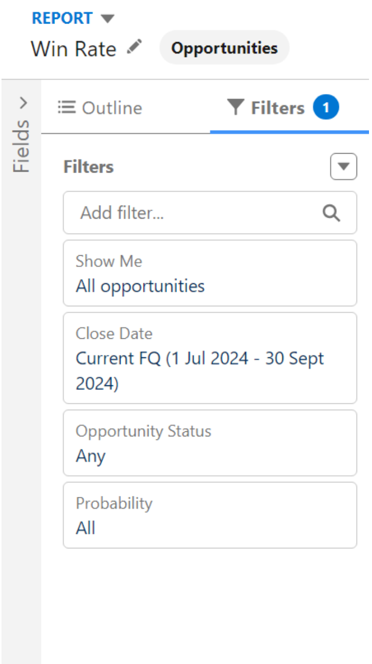


The report of Total sales has been uploaded to github folder.

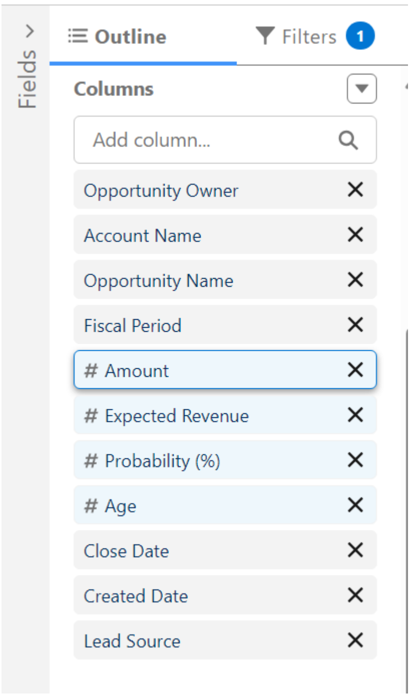
Next report that needs to be created is Win Rate.

The report type of Win Rate is Opportunity.

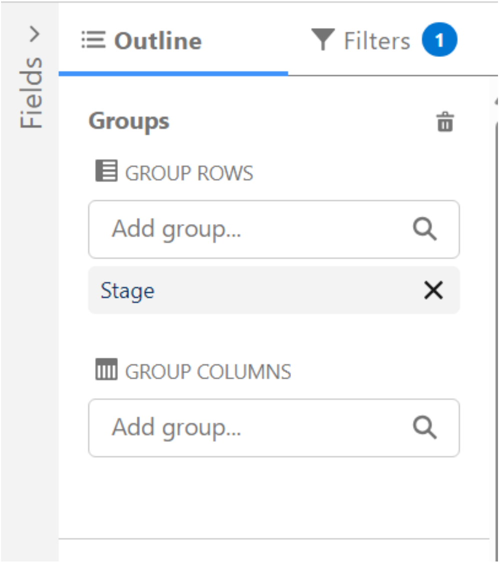
The following filters has been used



The following columns has been selected

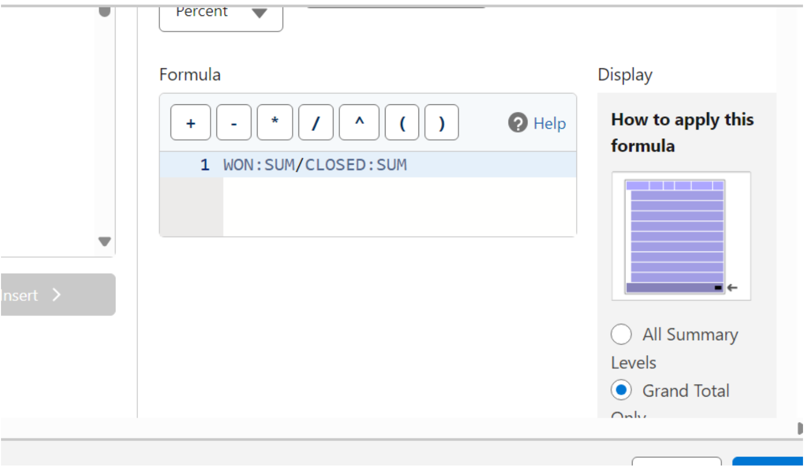


The rows have been grouped by Stage



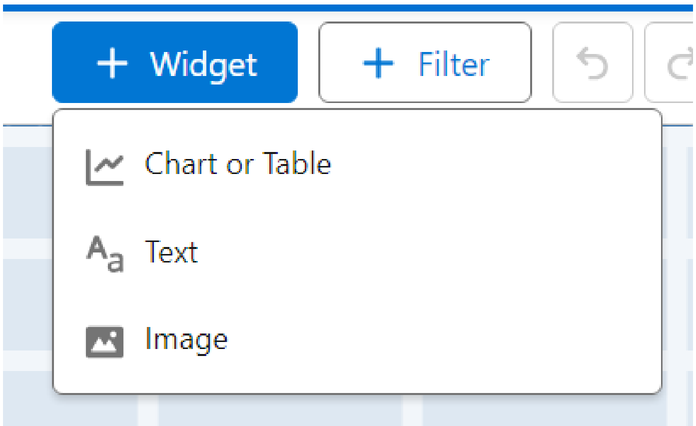
The win rate will be calculated in the following way by using summary column formula

Edit Summary-Level Formula Column

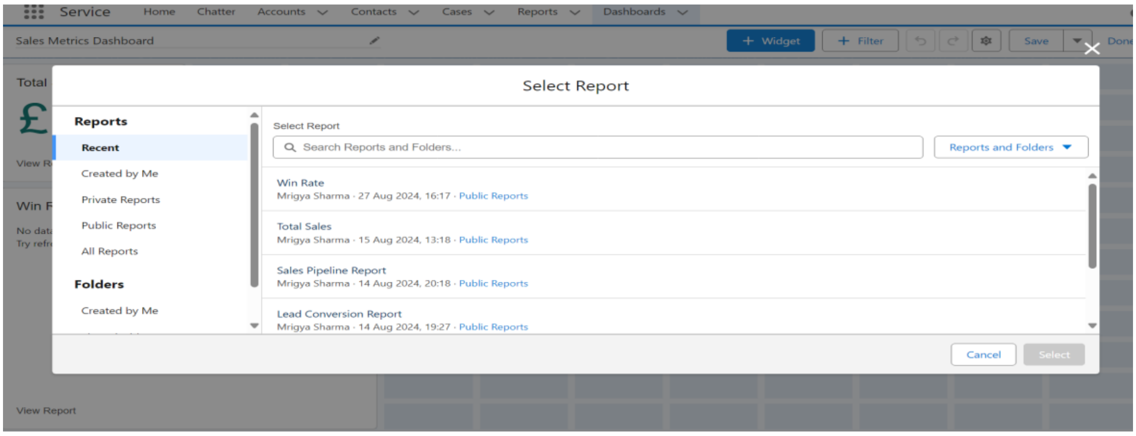


The Win Rate report is available in GitHub folder.

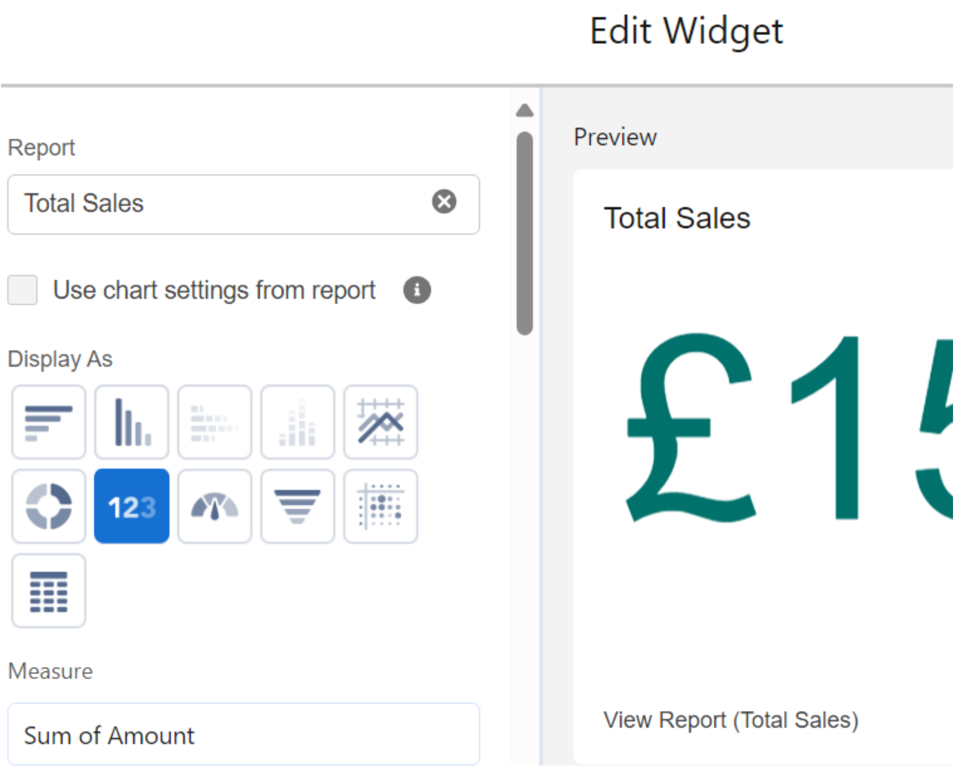
Now after going to creating a New dashboard, the chart or Table option will be selected under Widget



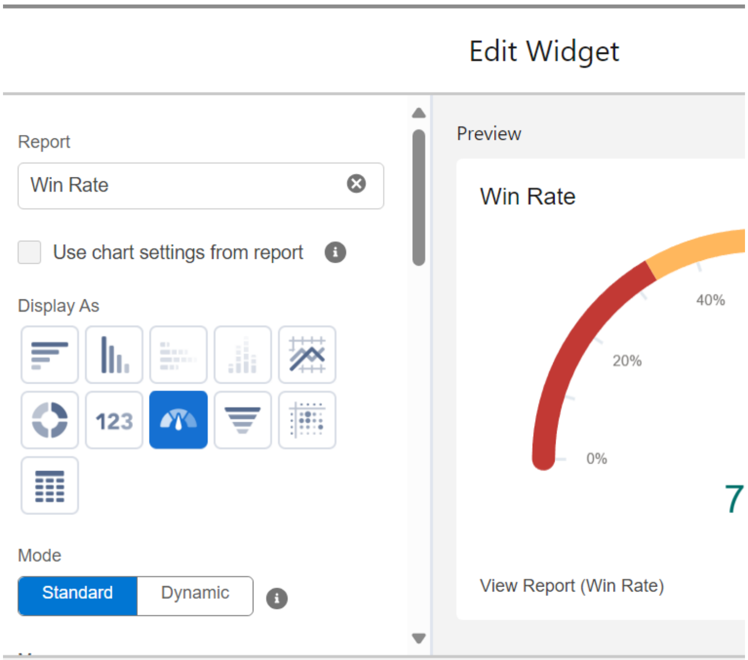
Now total sales option will be selected



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



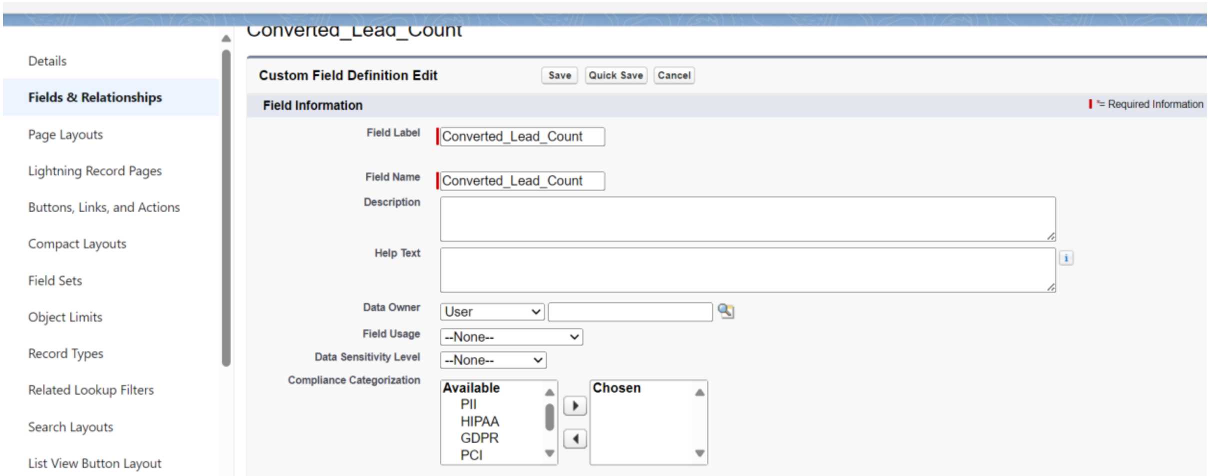
We will follow the same steps as above for win rate, but instead of selecting metric display, the gauge chart will be chosen



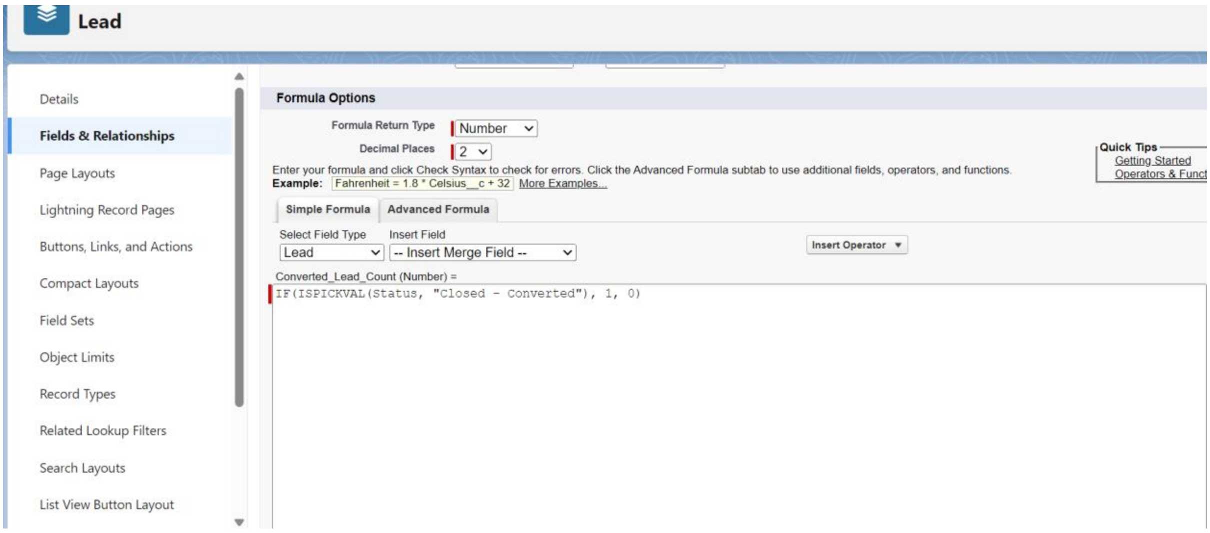
The dashboard is available in Github folder.

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

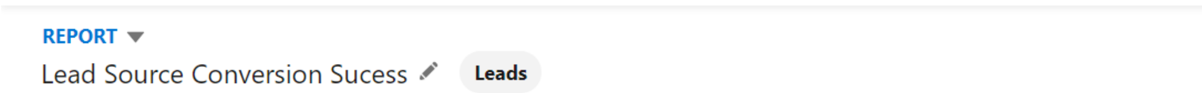
  Since the Salesforce is considering Ready For Closure and Closed-Converted same, the custom formula under Leads is created under Fields and Relationships



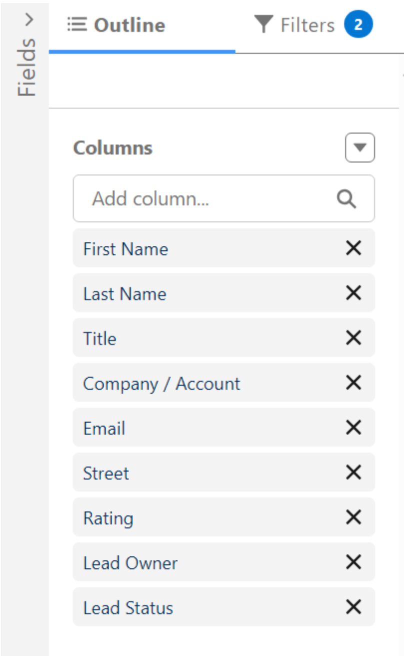
The following formula has been used



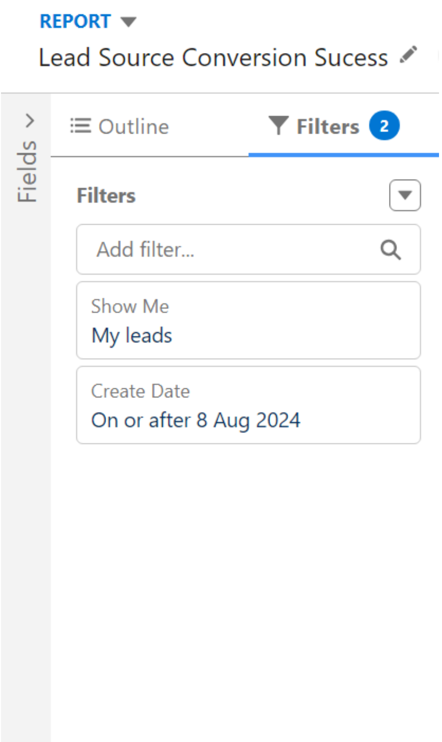
Now the report has been named to Lead Source Conversion success with the Lead Report Type.



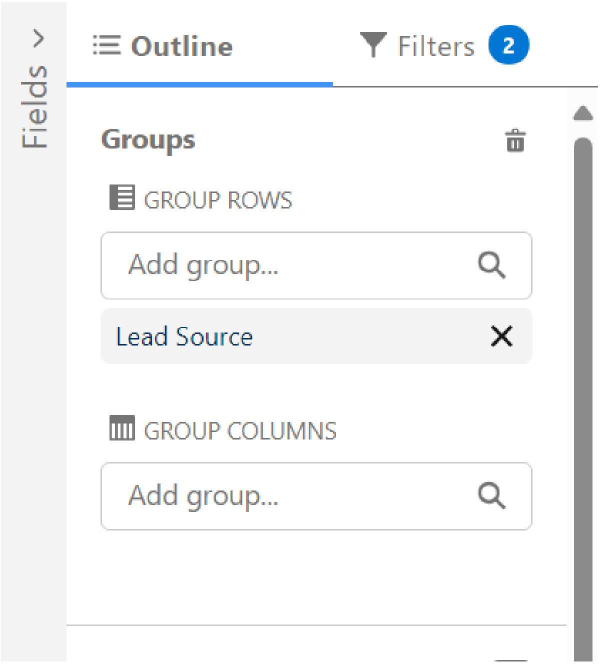
The following columns have been used for report



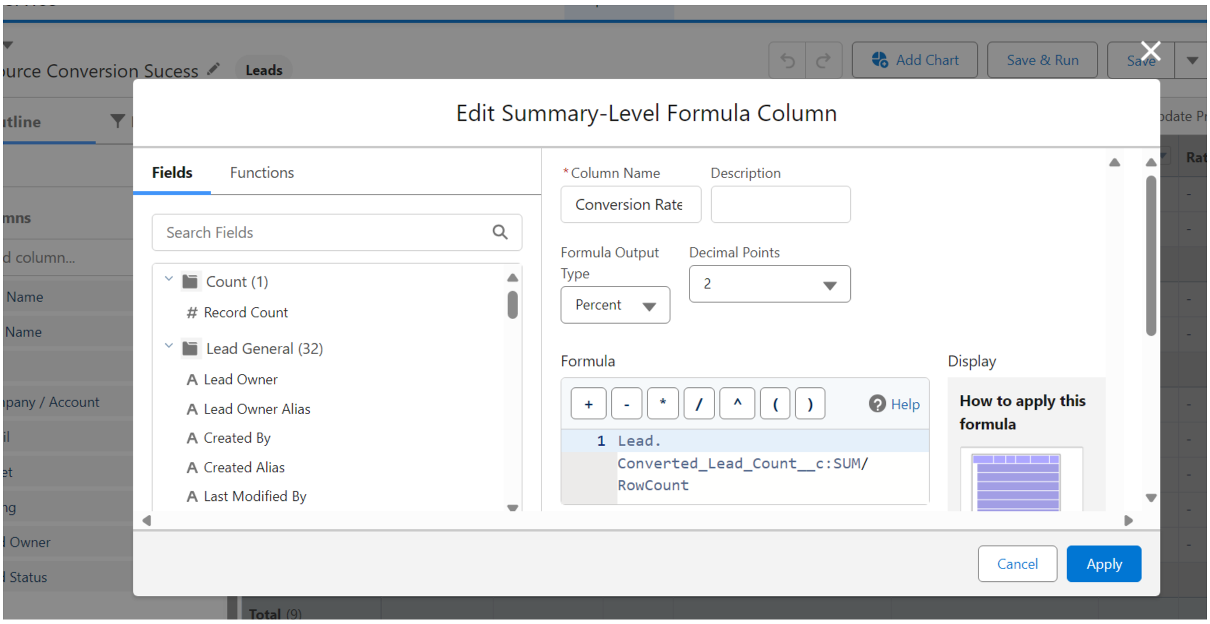
The following filters has been used



The Rows have been grouped by Lead source.

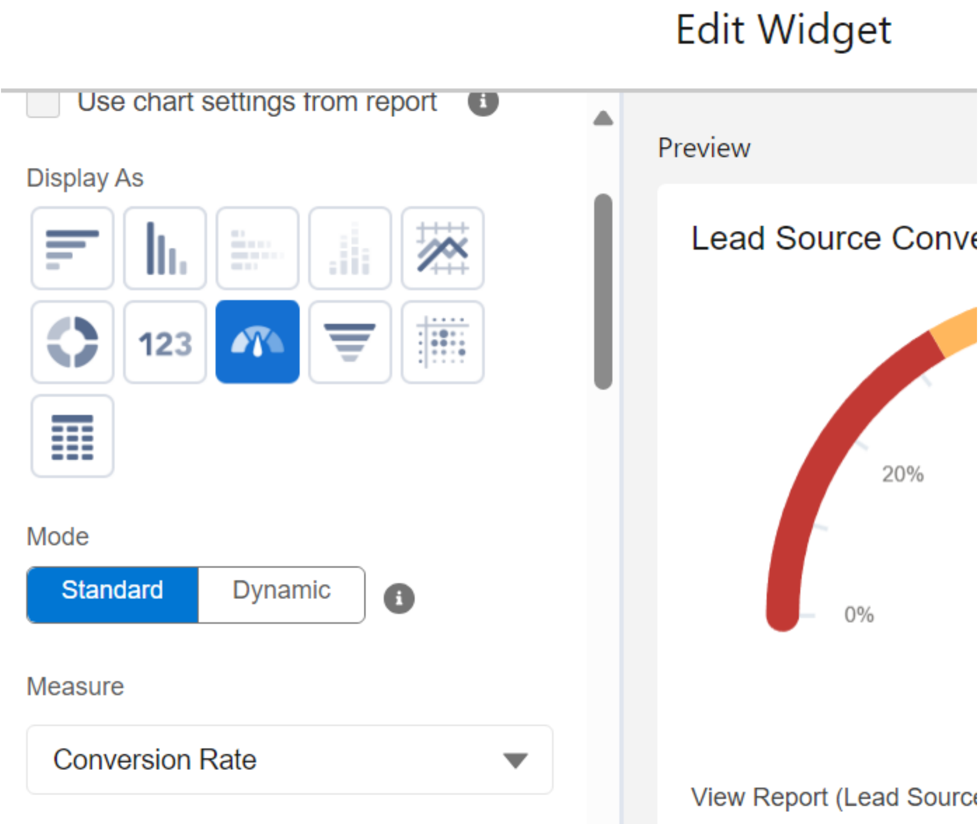


The summary column formulas has been named as Conversion rate and the following formula has been used.

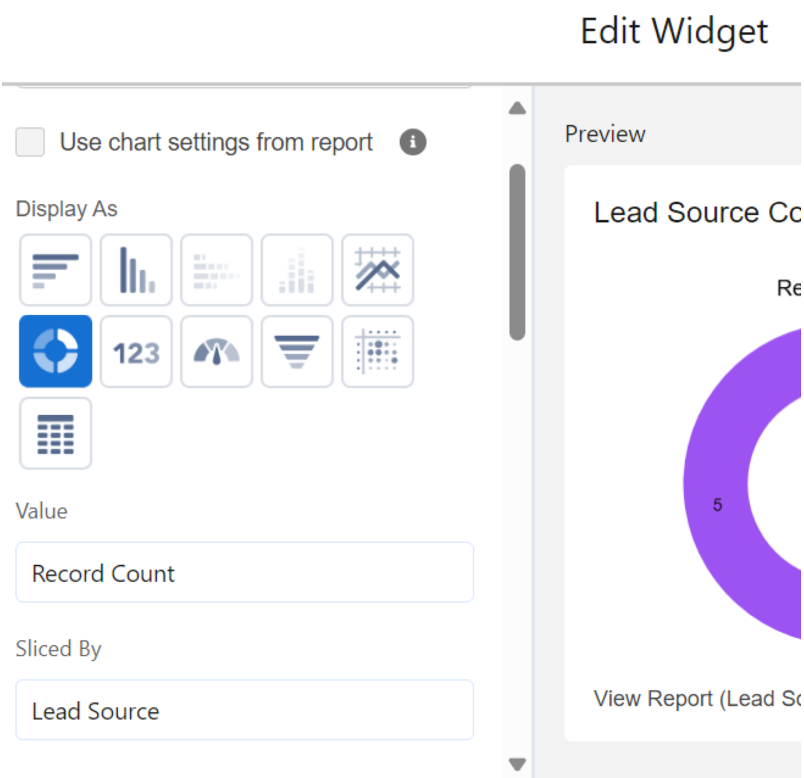


The report of Lead Source Conversion Success is available in github folder.

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.



The dashboard is available in github folder.