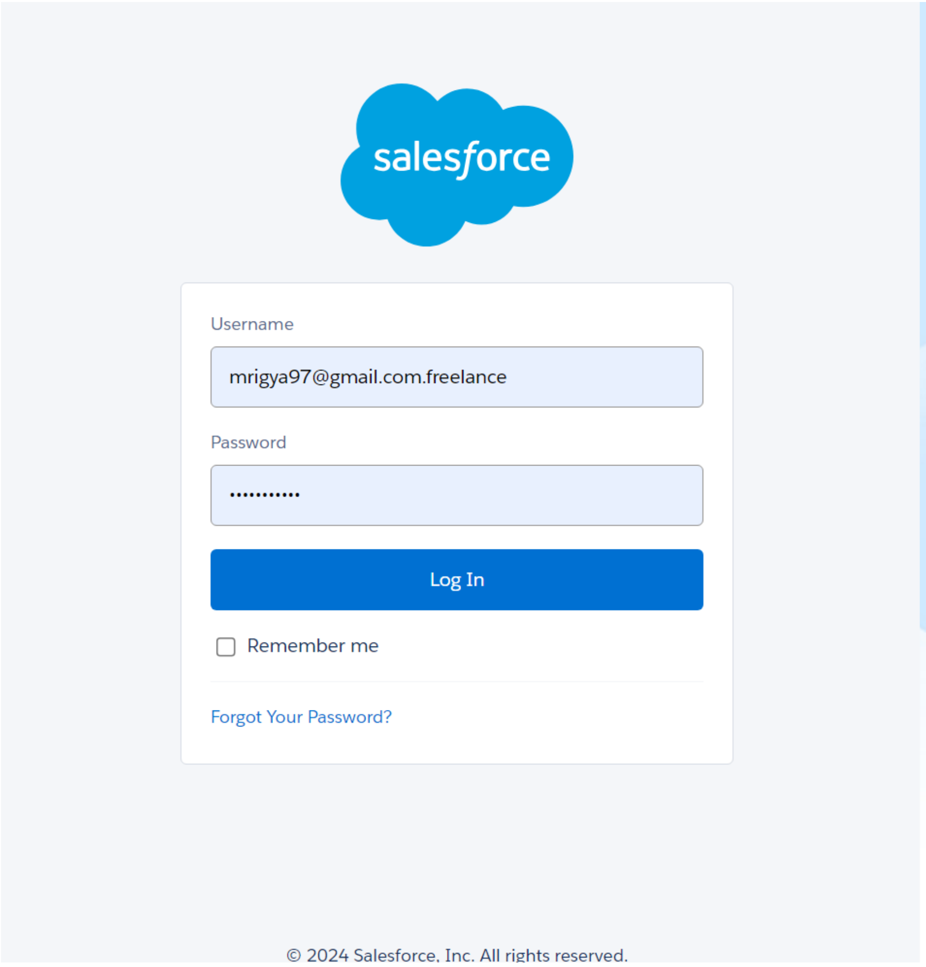
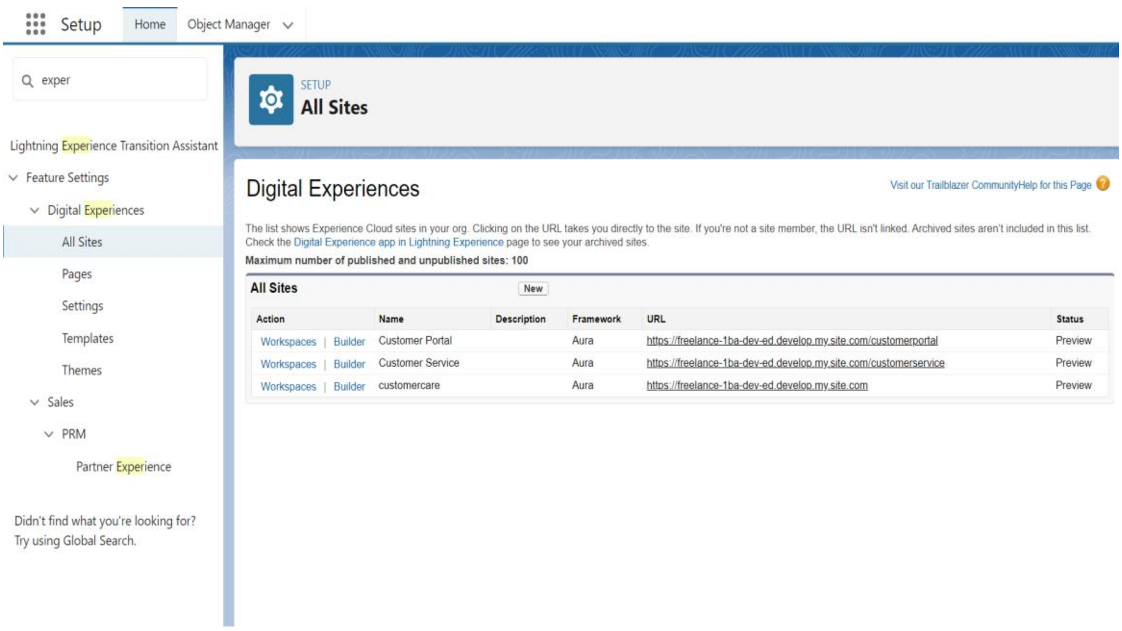
1. Enabling Digital Experience

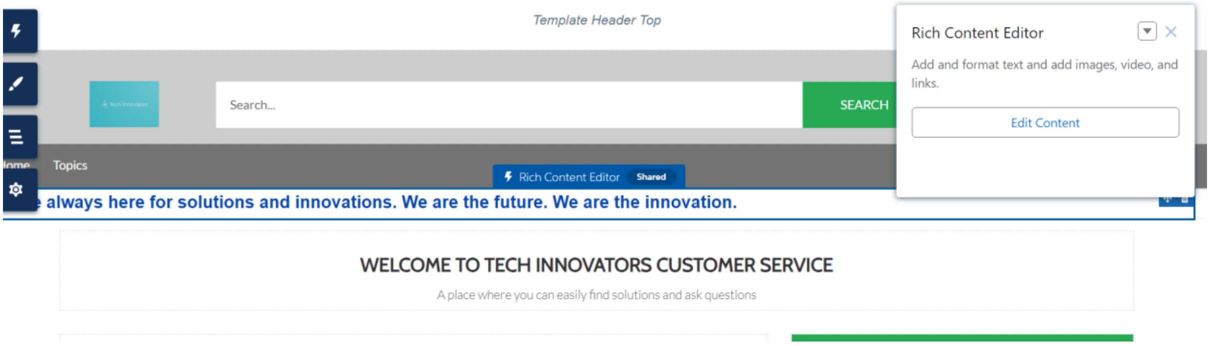
- First login to Salesforce



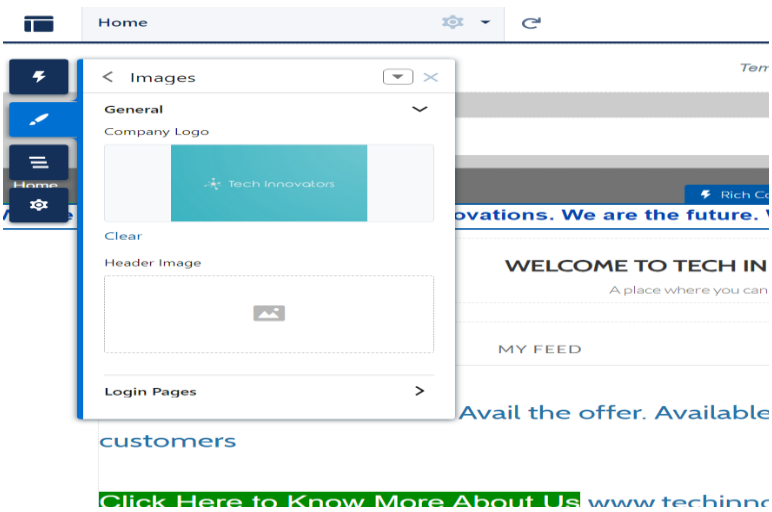
- Then in Setup mode, after going to digital experience and selecting all sites, the Customer Service has been created using Customer Service Template.



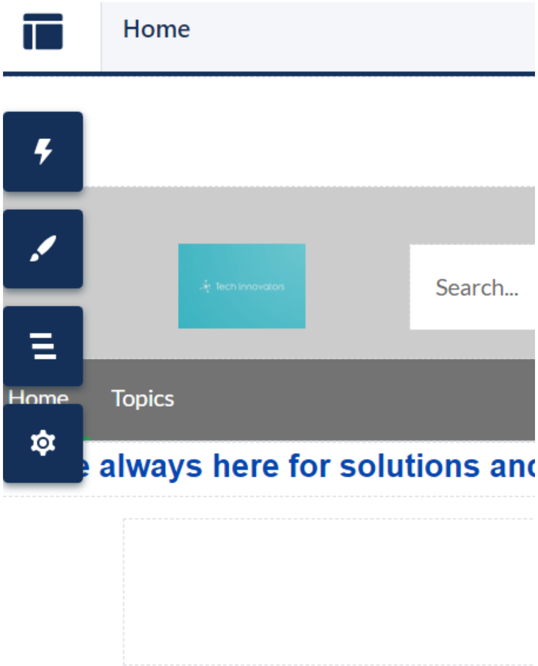
- Then Builder option will be clicked
- The following blue colour line has been edited using Rich Content Editor.



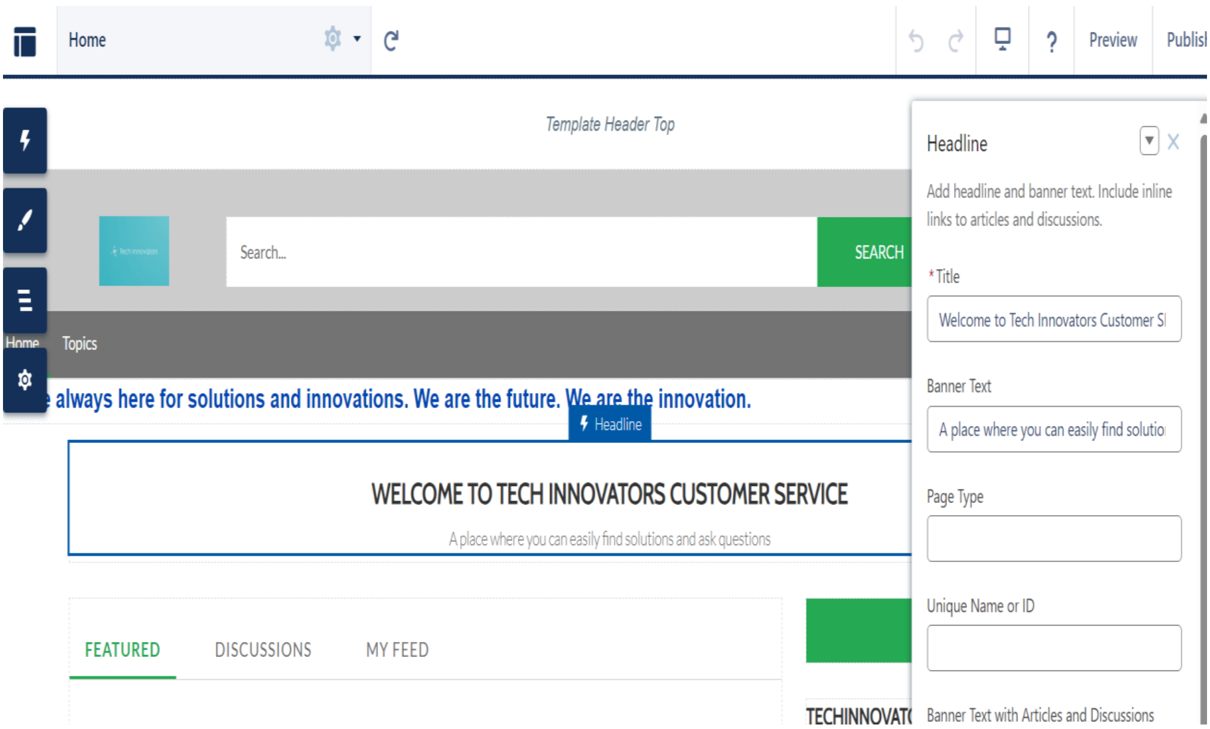
- Under themes section, the imaginary company logo name will be uploaded to the company image



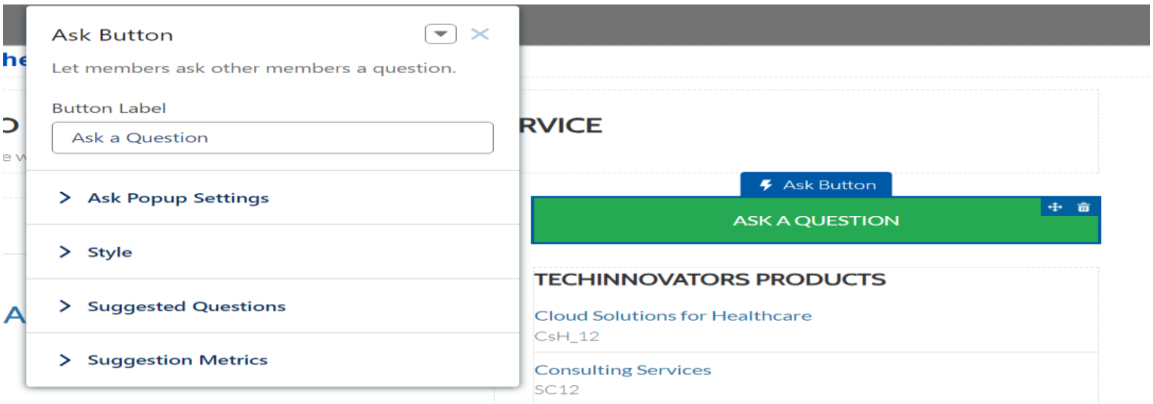
- The company logo has been uploaded successfully



- The headline has been updated.

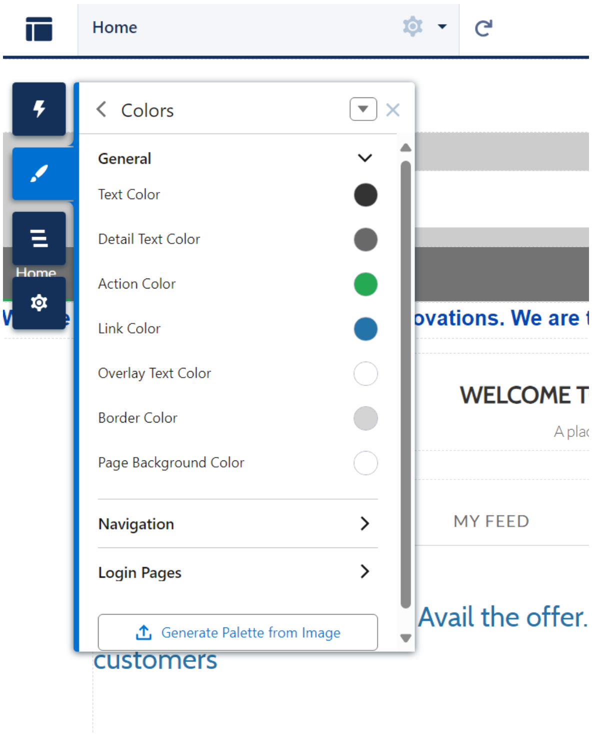


- The ask button has been updated from Components Option

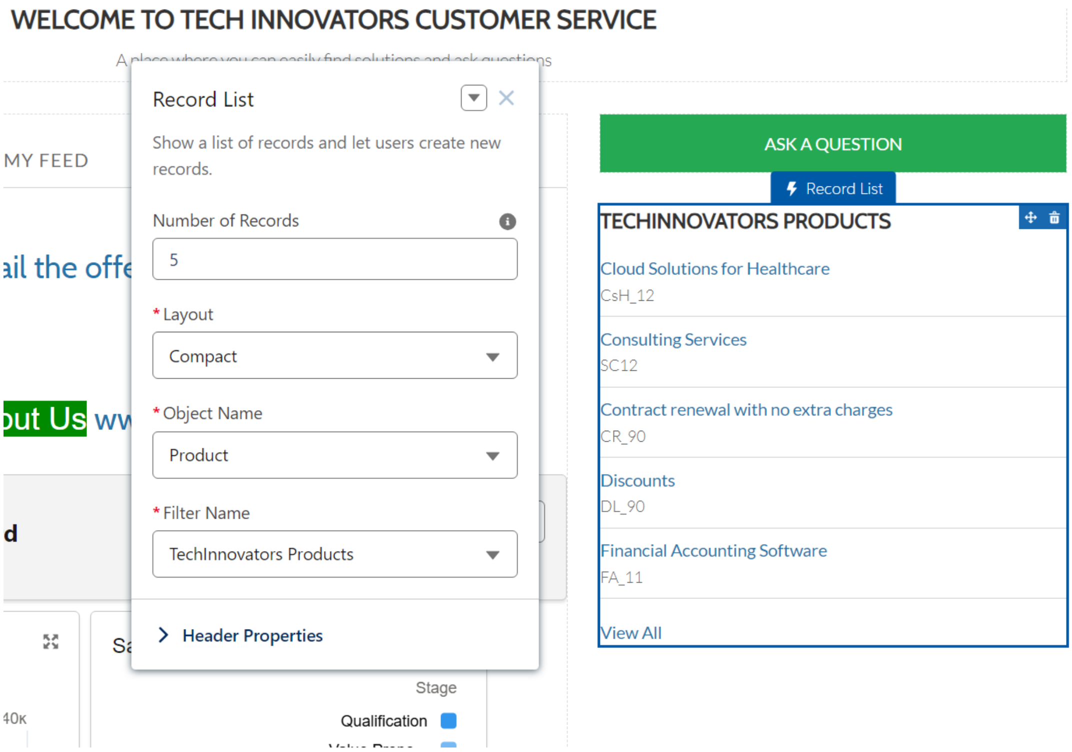


- The following button have also been updated.

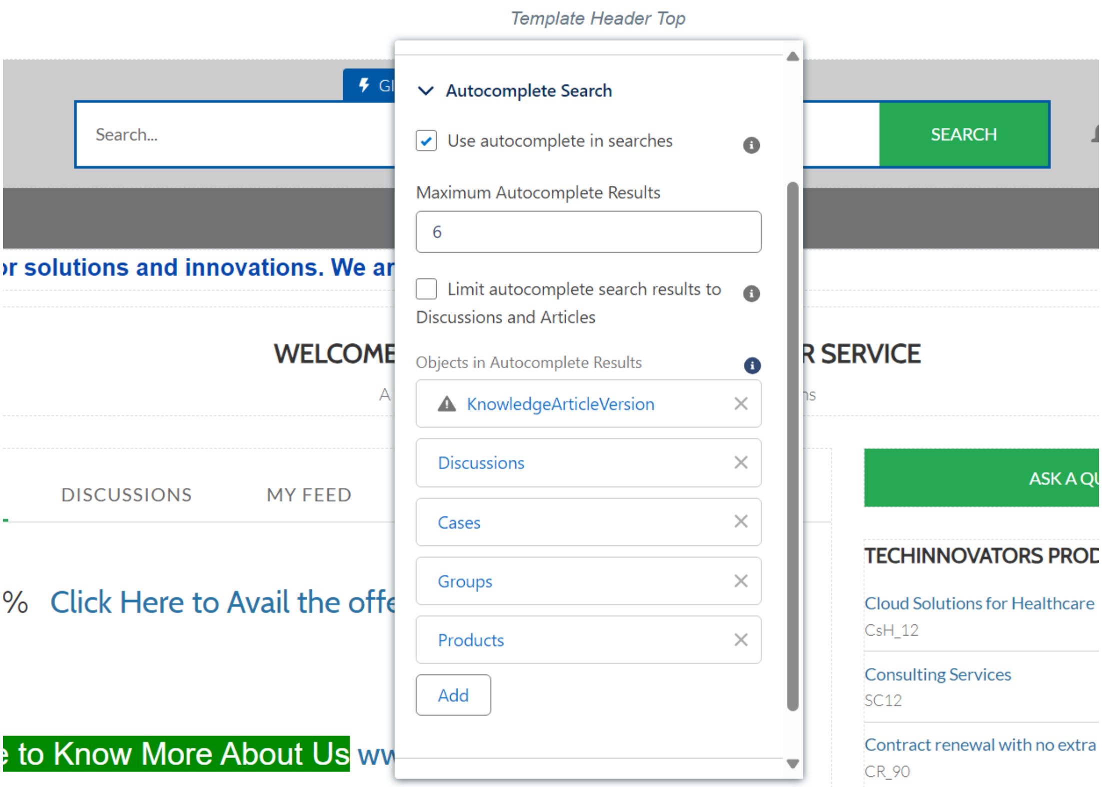
- The action colour has been changed to green colour



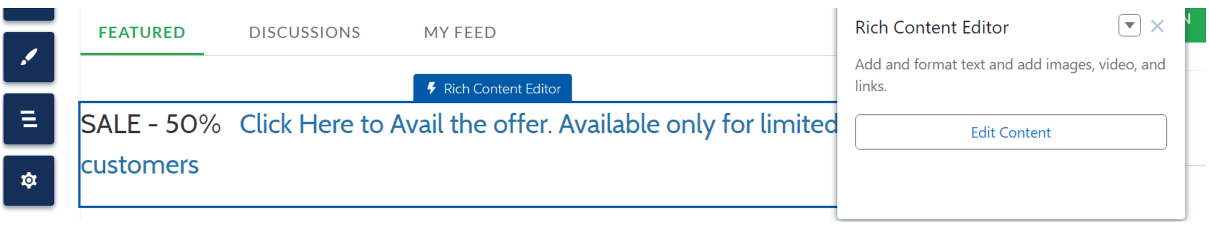
- The record list has been dragged from the Components section and following changes has been made. How the product list is created will be discussed later in the report.



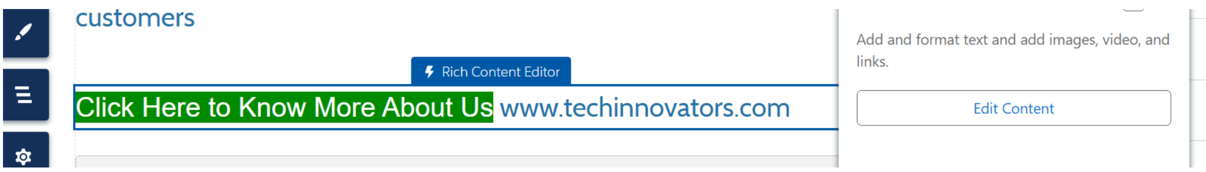
- The Products has been added to the Autocomplete search.



- The following changes have been made using the Rich Content Editor and converted into hyperlink

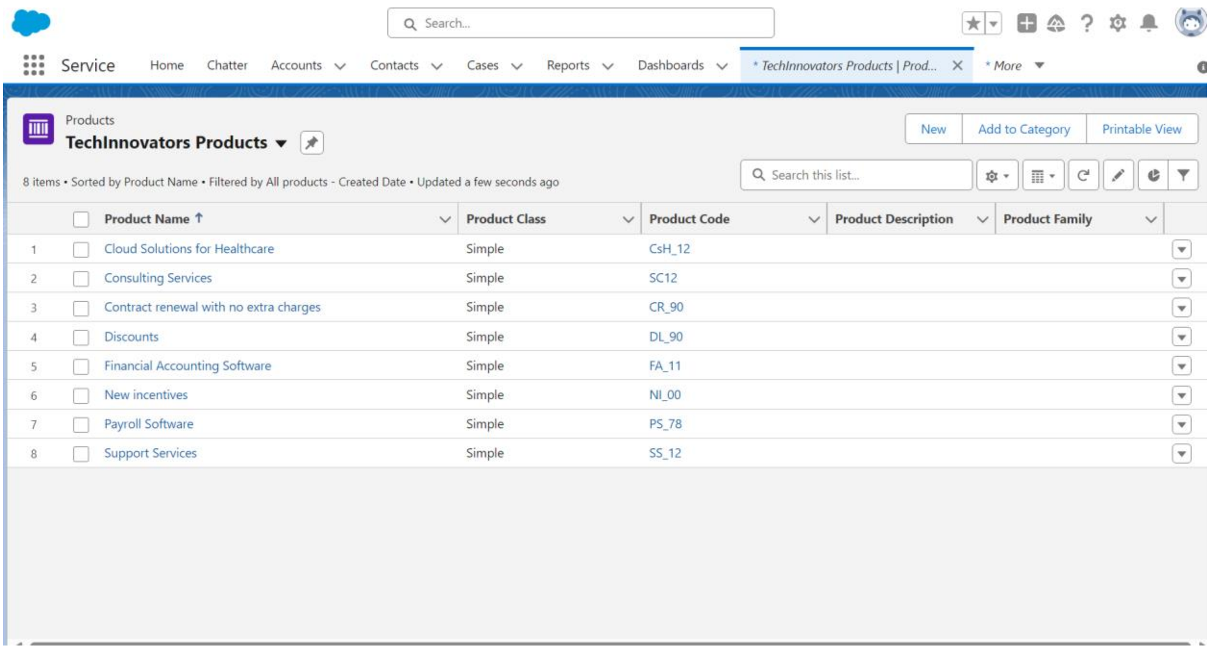


- The following changes have been made using the Rich Content and converted it into hyperlink

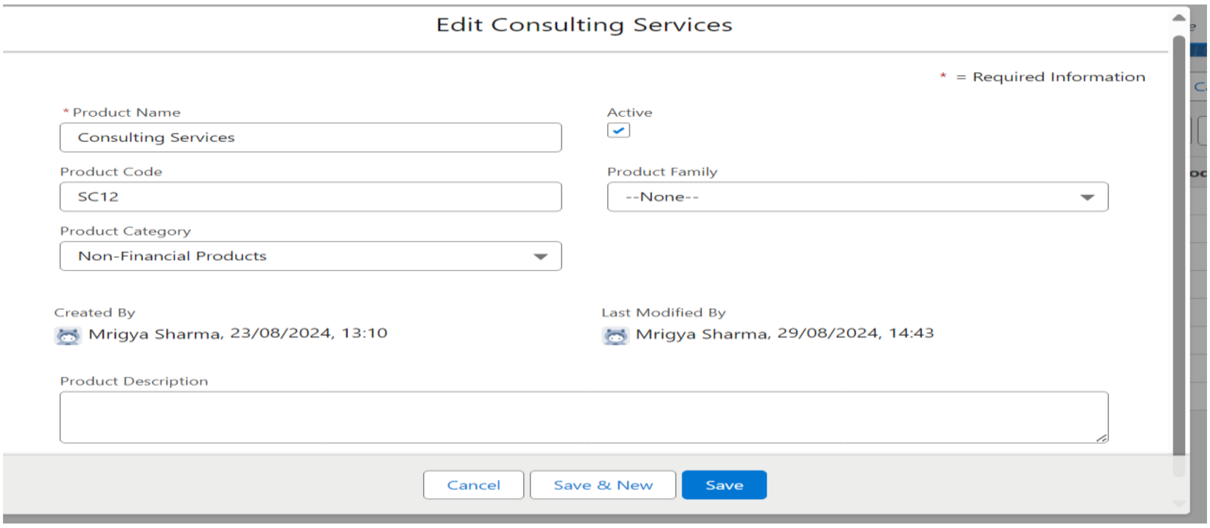


2. Creating Product List and Catalog

- Under the Salesforce service and selecting the products after cloning the original list, the list has been created after setting filters and renaming it.



- This is how each product has been added. Why and product Product category has been added will be discussed later in the report



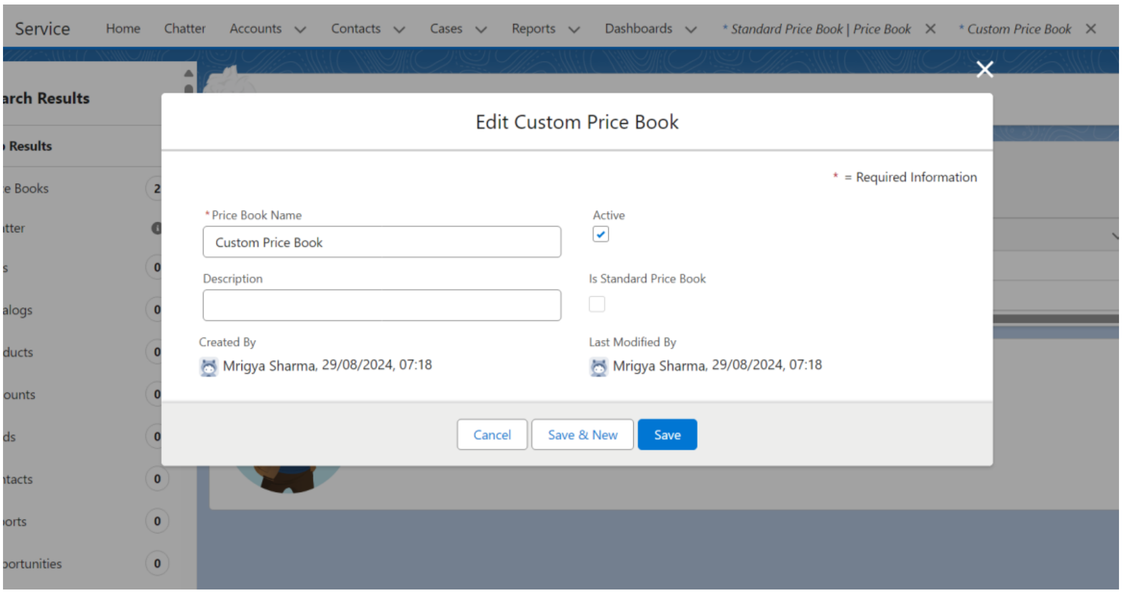
- As previously mentioned, the list has been dragged to the builder page catalog and was also added to the autocomplete search.

3. Creating and Adding Dashboards

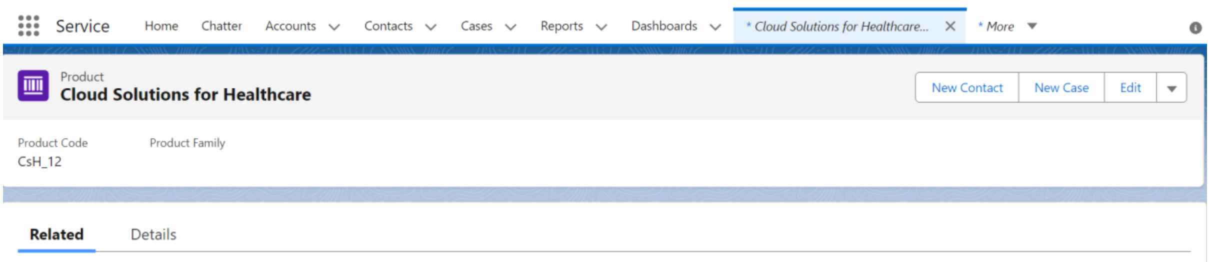
i) Sales Overview: -

Chart Type: - Bar Chart
Data: - Total Revenue by Product
Objective: - Show how much revenue each product has generated.

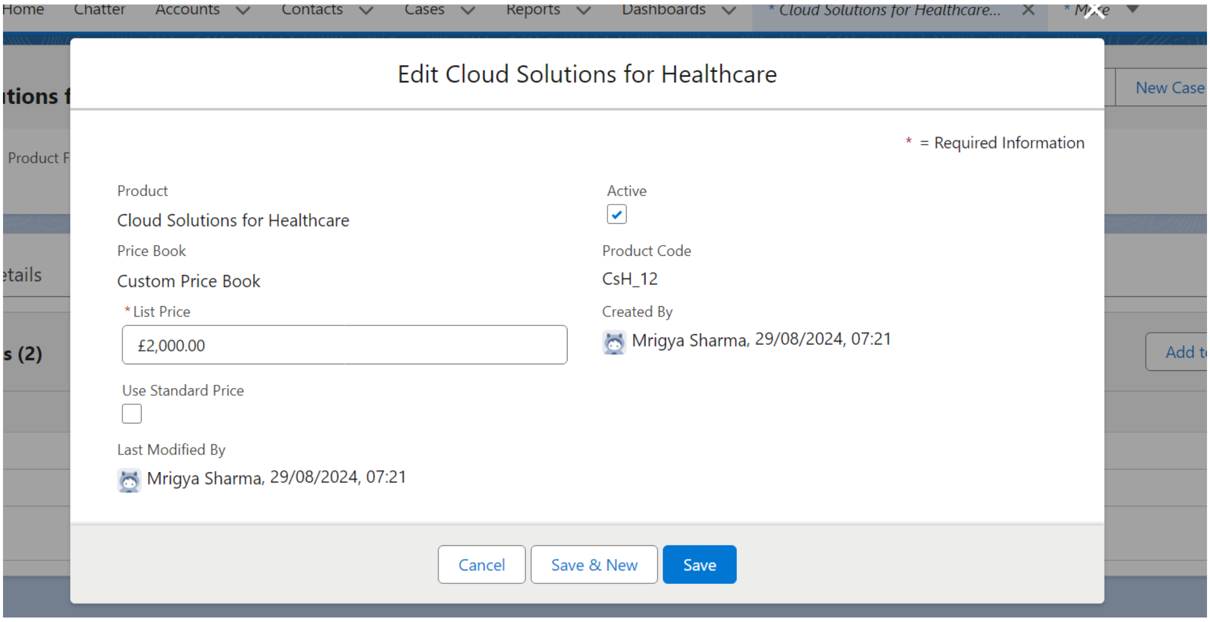
a) Firstly, the report needs to be created, but first, the new custom price list needs to be created under price book.



Later, TechInnovators Products List needs to be opened. After selecting a product, navigate to related

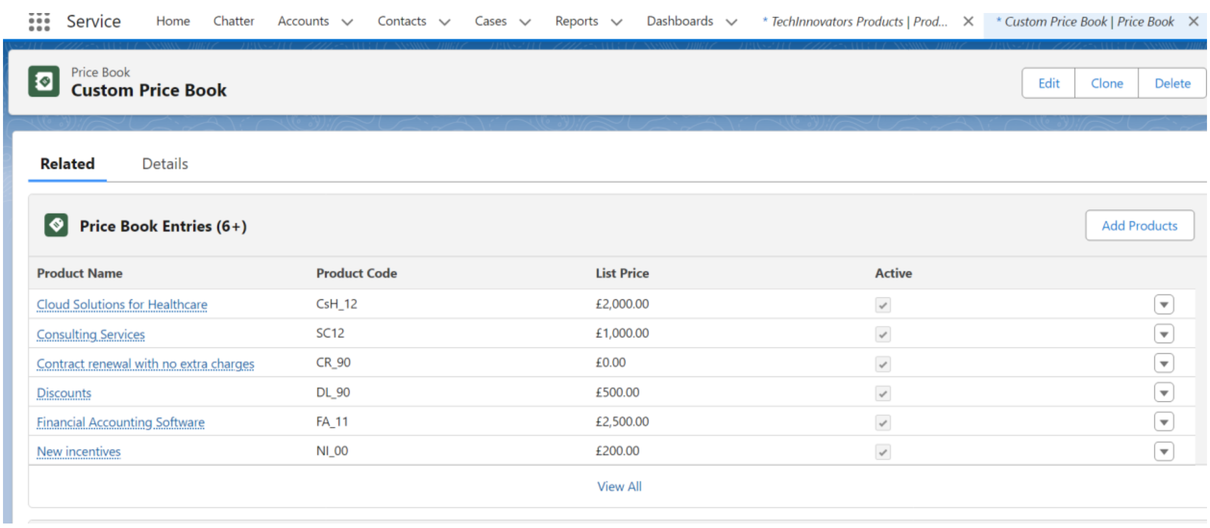


After selecting standard price book, following changes have been made

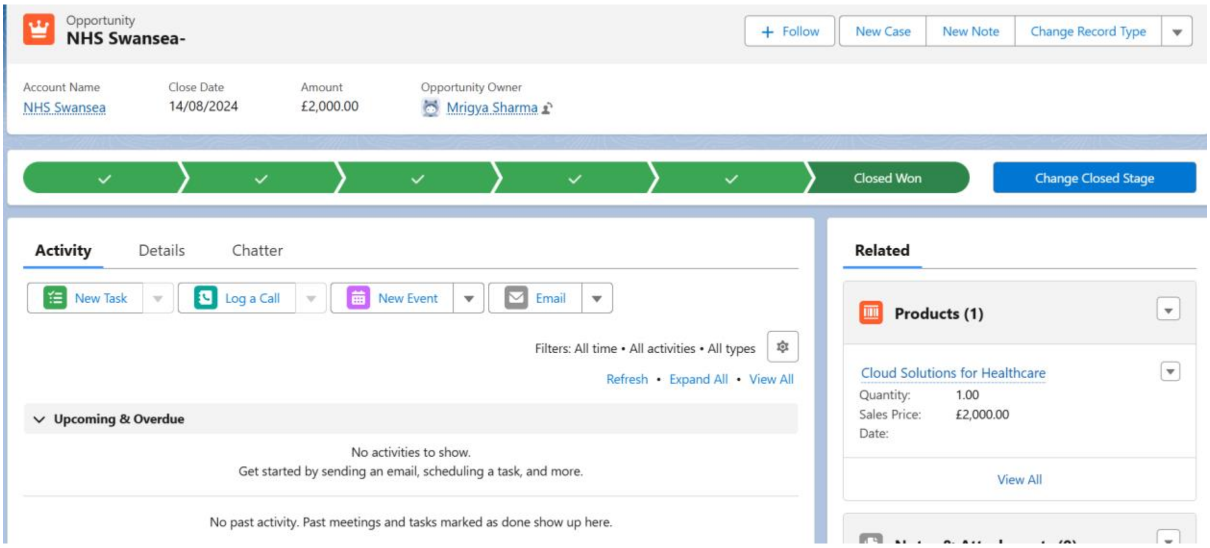


Similar process has been done for remaining products

After assigning standard price book, the custom price book will be opened. Under add products, all the custom products of TechInnovators will be added.

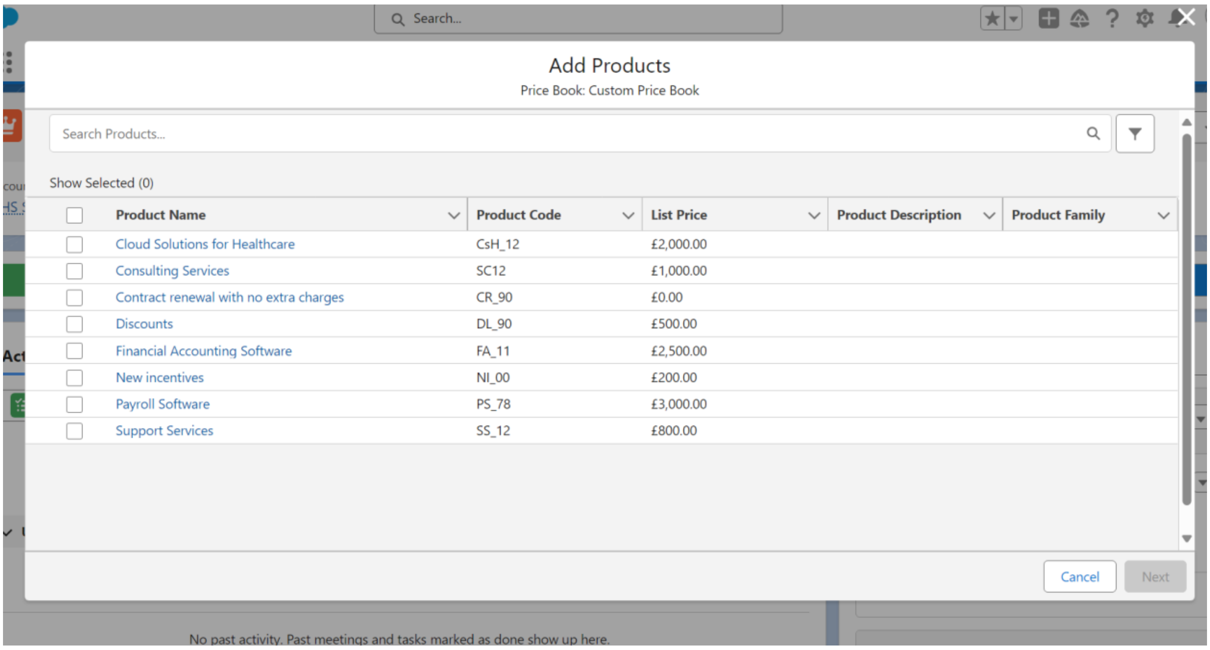


Now one opportunity will be opened and add products option will be chosen, just next to Products

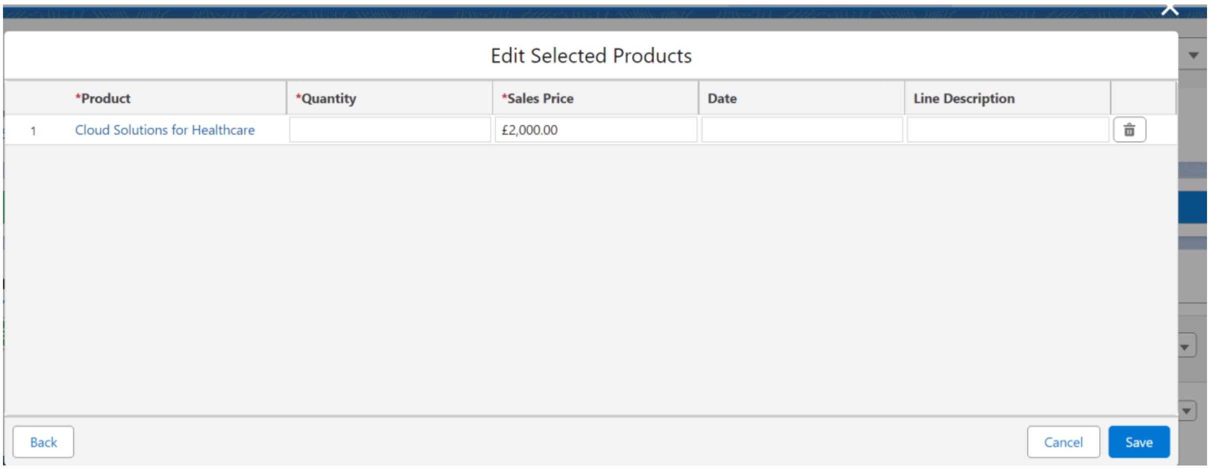


One option will be asked to choose the price book, in this case, custom price book has been chosen

The following products will appear to select

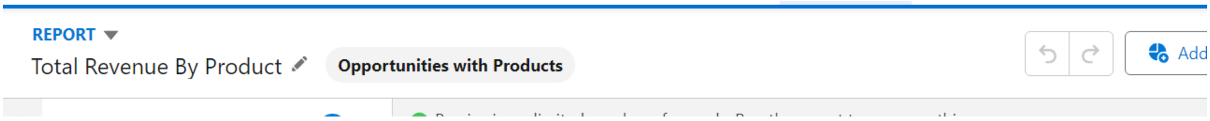


Now the number of quantity can be added according to the opportunity and products required.

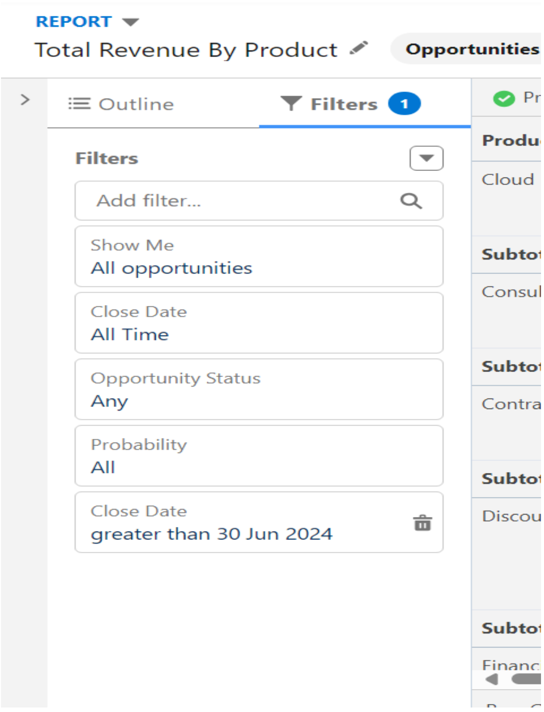


Similarly, it is done for other opportunities and products.

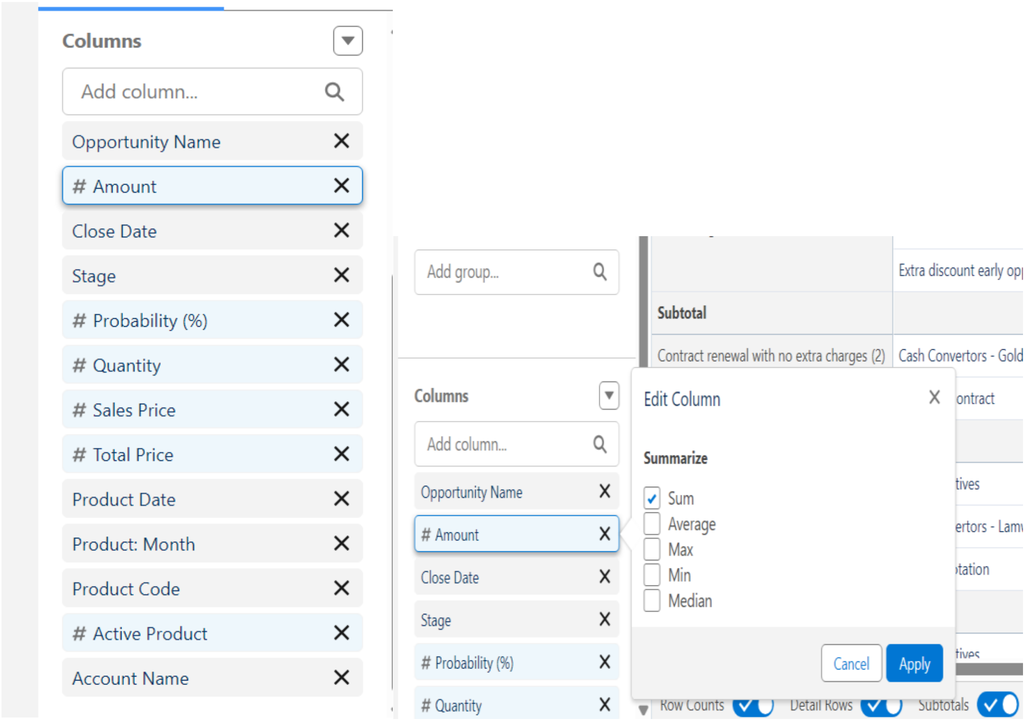
b) Now under Reports, a new report will be selected where the report type will be Opportunities with Products



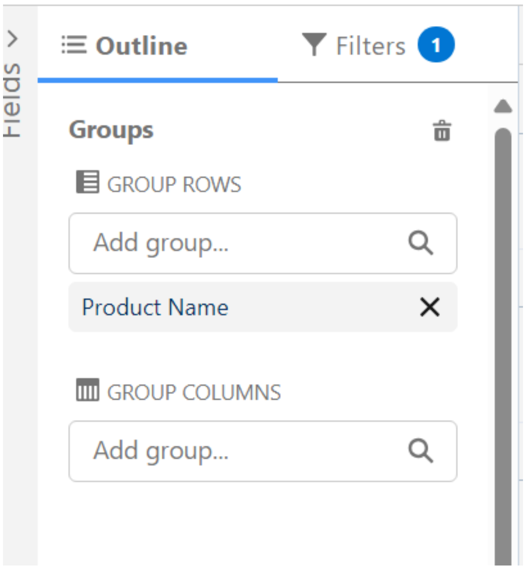
The following filters have been used



The following columns have been used and the amount has been summarised



It has been grouped by Product Name



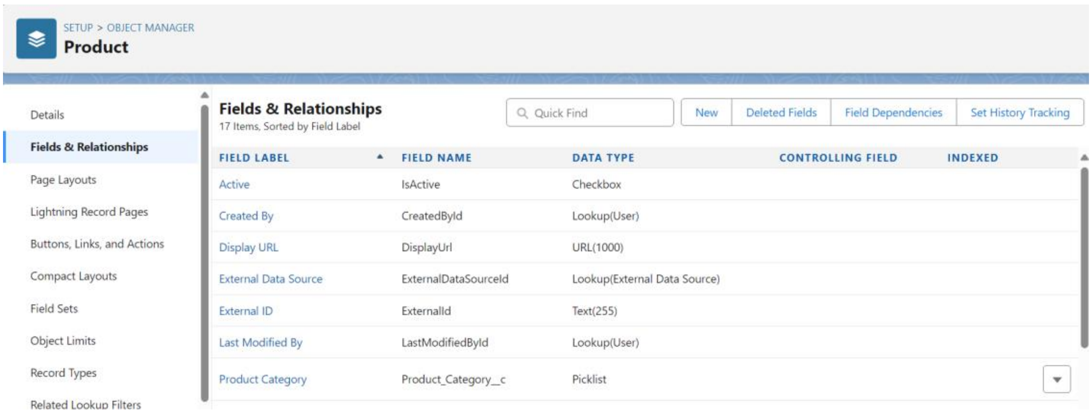
The Total Revenue by Product is available in github Folder.

ii) Top Products

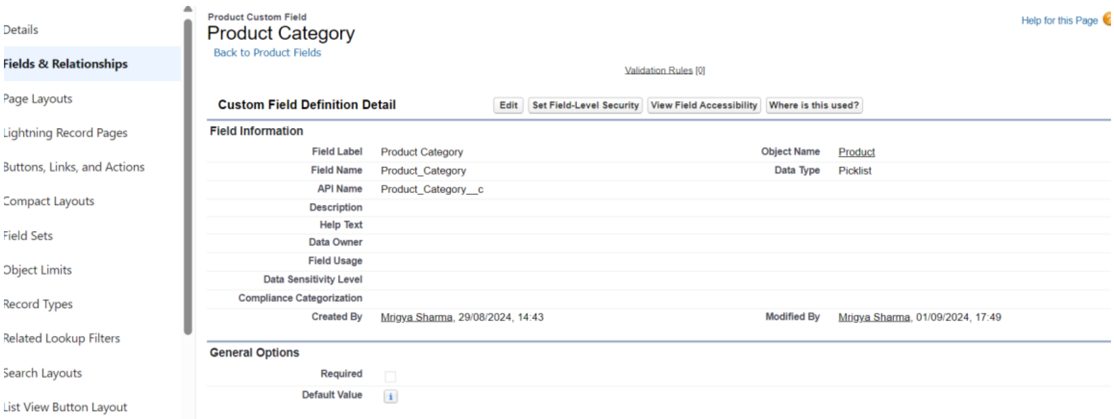
Chart Type: - Pie Chart
Data: - Revenue Distribution by Product Category
Objective: - Highlight which product categories are generating the most revenue.

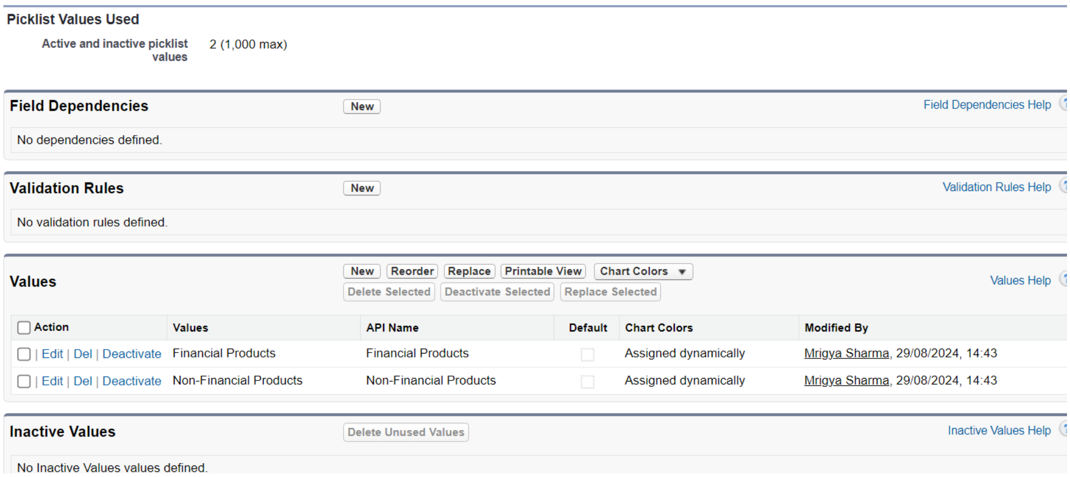
a) Firstly, before the creation of report, the object Product Category has been created under Products

So, under Object Manager, Product has been selected and then Fields and Relationships



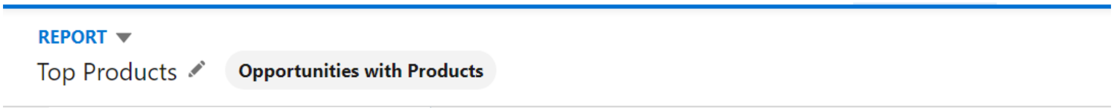
After selecting new, it will navigate to the next page, the following settings has been made



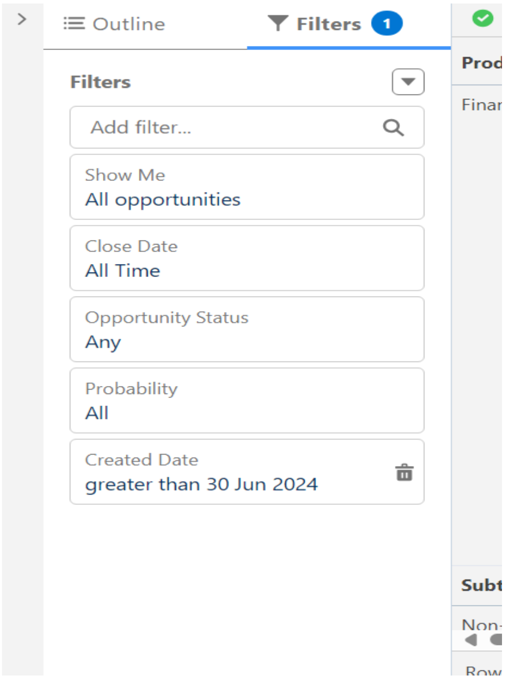


Now after going to Products list, the products has been categorised on Financial Products and Non-Financial Products based on the nature of the product by using Product Category object.

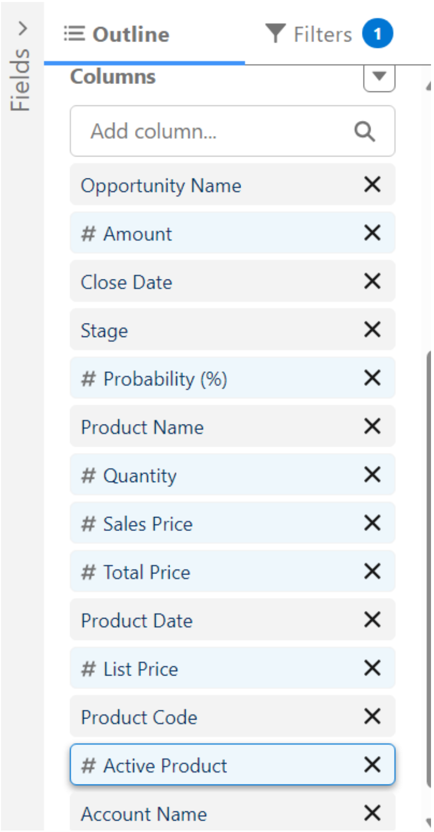
b) After categorising the products by category, now the report will be created using Opportunities with Products report type

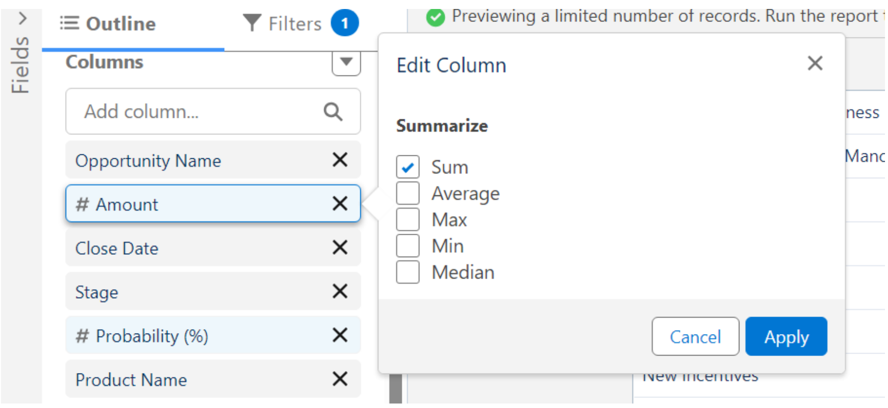


The following filters have been used

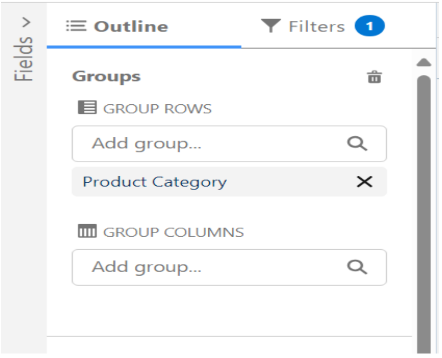


The following columns have been used and amount has been summarized





The rows have been grouped by Product Category



The report of Top Products is available in GitHub Folder.

iii) Sales Pipeline: -

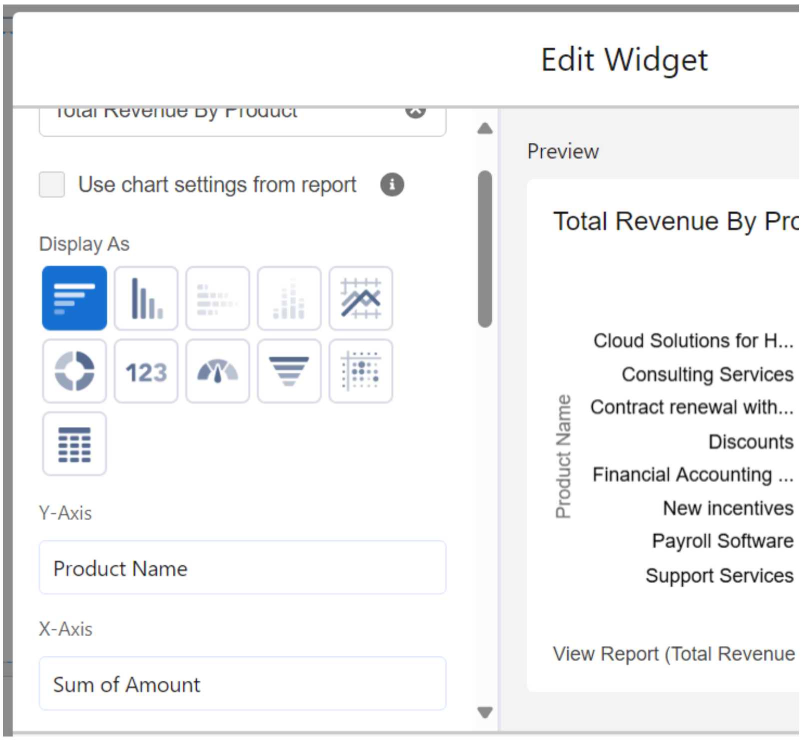
Chart Type: - Funnel Chart
Data: - Opportunities by Stage
Objective: - Visualize the distribution of opportunities through various stages of the sales process.

The Sales Pipeline Report was already present in the Salesforce report folder. However, I have added it to the GitHub folder.

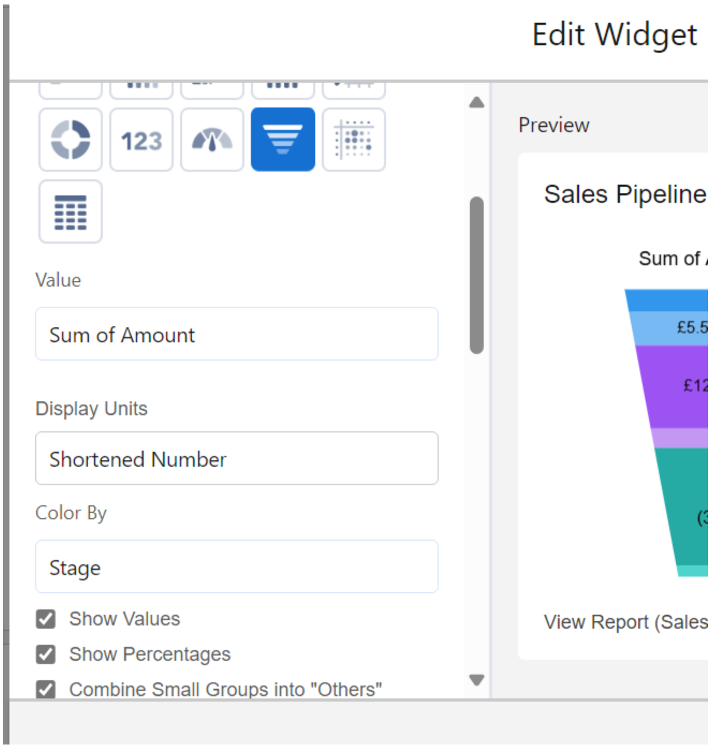
iv) Creating Dashboard: -

For creating a new dashboard, a new option will be selected, after opening the new empty file, under widget, chart or table option needs to be selected for all three visualisations.

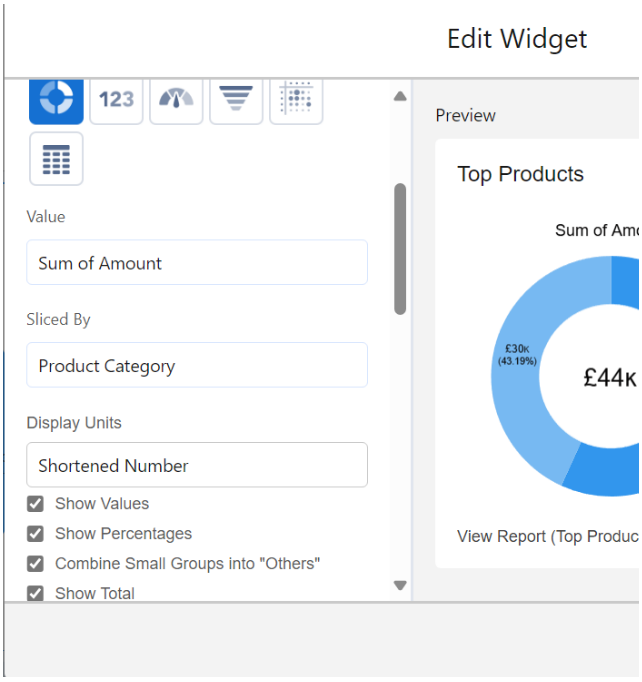
For Total Product by Revenue, the type of Bar Chart will be Horizontal Bar Chart, Y-axis will be Product Name and X-axis will be Sum of Amount.



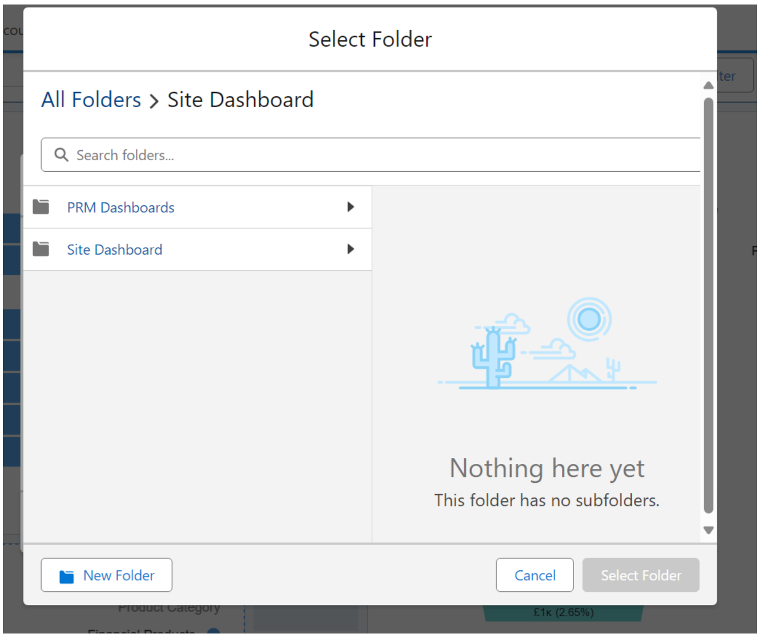
For Sales Pipeline Report, the type of Chart will be Funnel Chart, Value will be Sum of Amount and Color By Stage and all the conditions boxes will be ticked.



For Top Products, the type of Chart will be Donit Chart, Value will be Sum of Amount and Sliced By Product Categories and all the conditions boxes will be ticked.



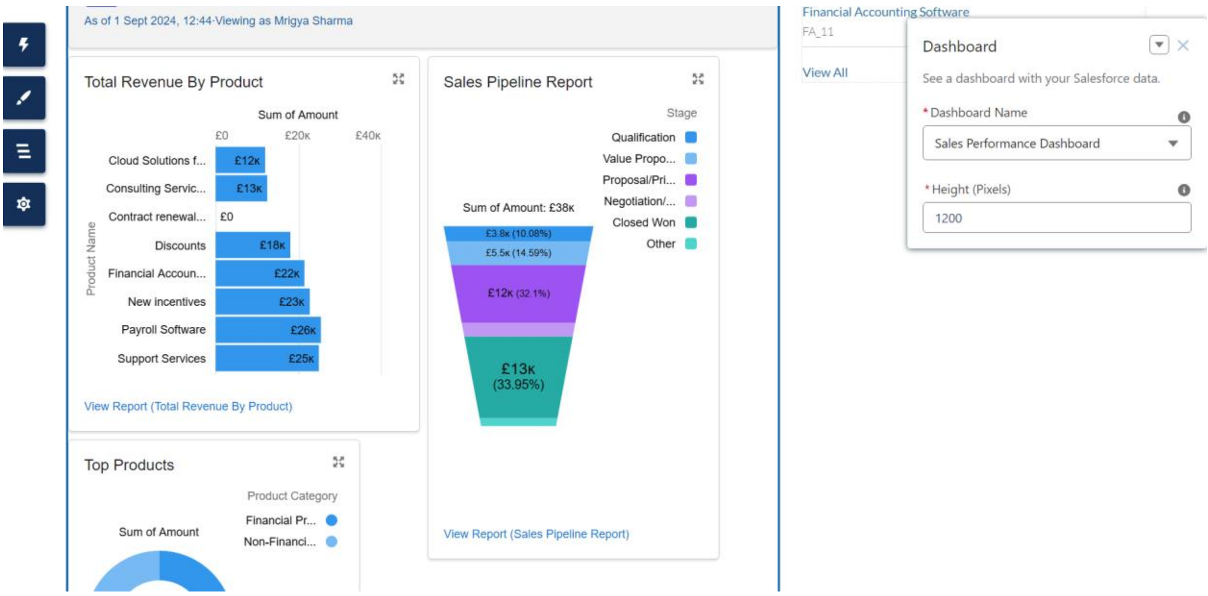
While saving the dashboard, make sure that it is saved to site dashboard because it will be used as a component in builder.



The Dashboard is available in GitHub Folder.

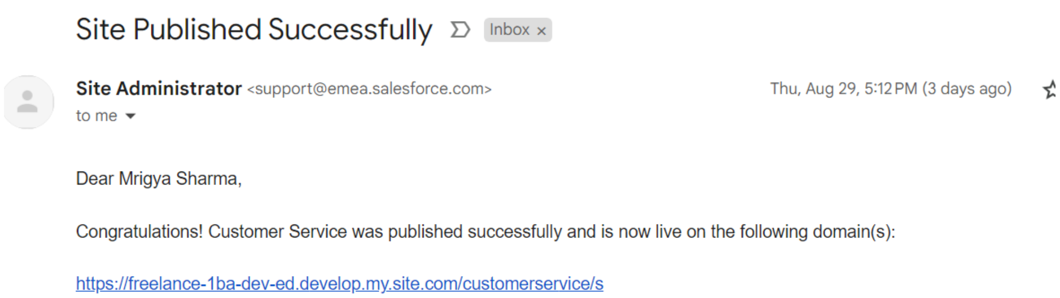
v) Adding Dashboard to the Builder site: -

Now after returning to the Builder site of the Customer Service, Under components, dashboard option will be selected and dragged to the specific area of the page. The particular dashboard will be selected, and pixels will be adjusted to 1200

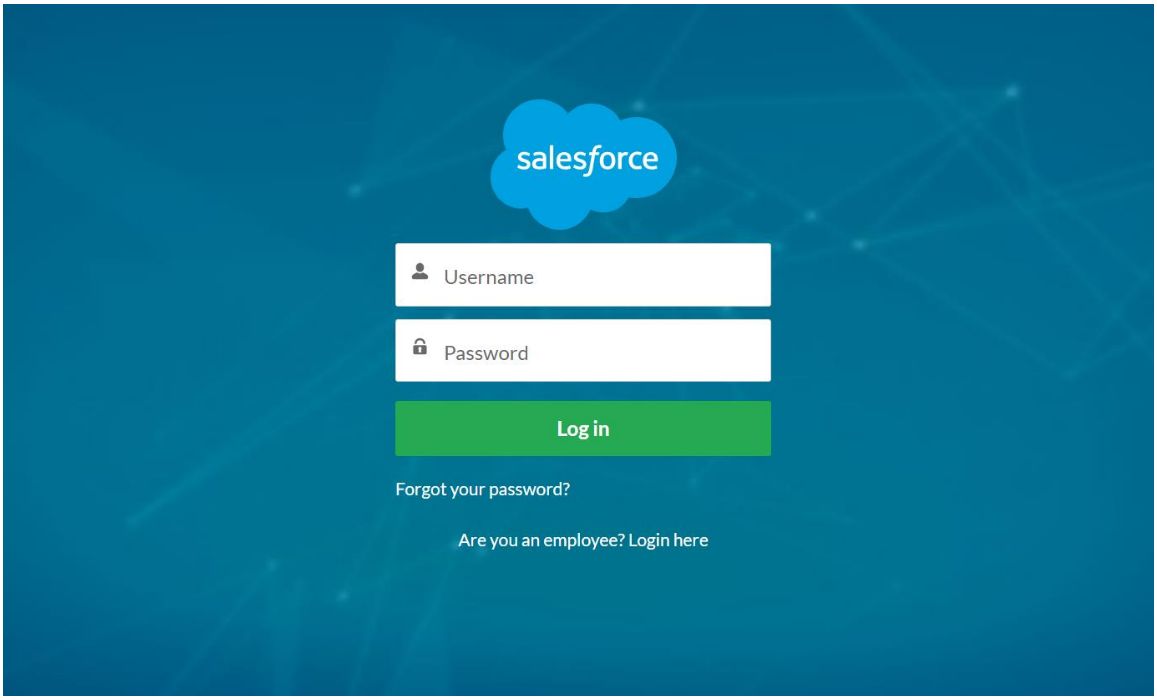


4. Publish and Preview the Page

Once the page is ready, click on publish and wait for the mail. The following mail has been received



After opening the website link, the following is been shown



All the necessary documents are available in GitHub folder.