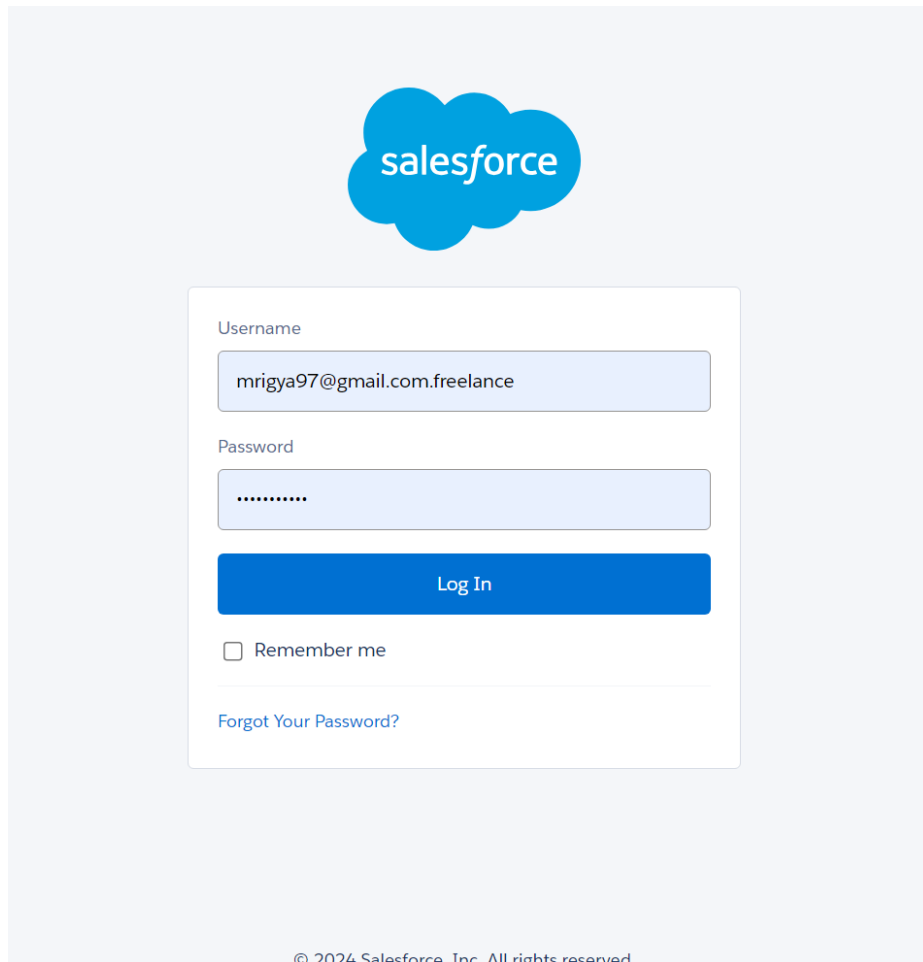
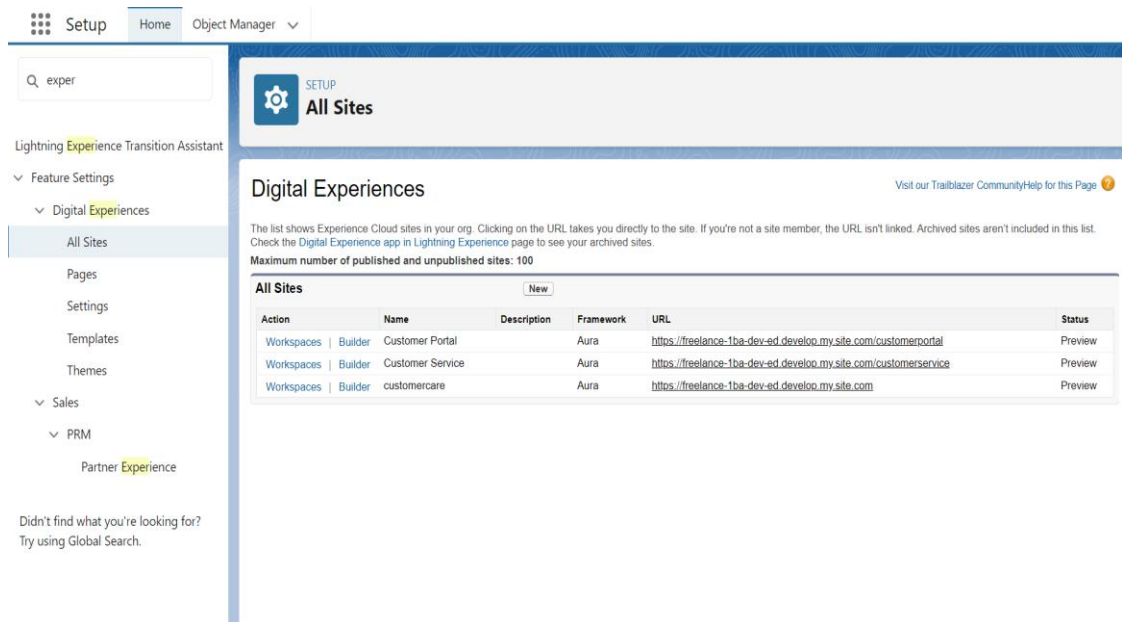


# 1. Enabling Digital Experience

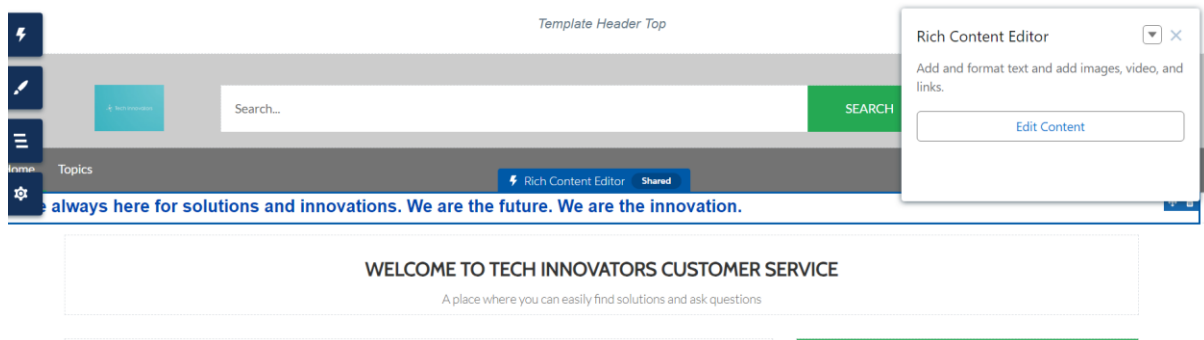
- First login to Salesforce

The image shows the Salesforce login interface. At the top center is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters. Below the logo is a white rectangular login form. Inside the form, there are two input fields: the first is labeled "Username" and contains the text "mrigya97@gmail.com.freelance"; the second is labeled "Password" and contains a series of dots. Below these fields is a blue "Log In" button. Under the button is a checkbox labeled "Remember me". At the bottom of the form is a link that says "Forgot Your Password?". The entire login form is centered on a light gray background. At the very bottom of the page, below the login form, is a small copyright notice: "© 2024 Salesforce, Inc. All rights reserved."

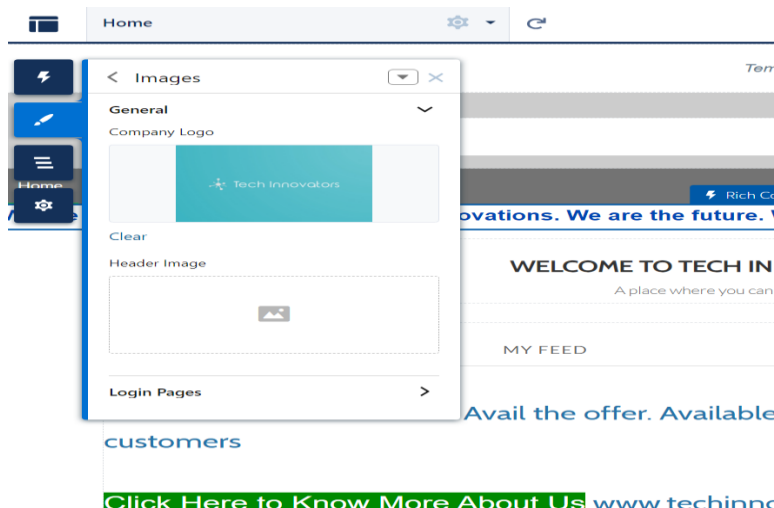
- Then in Setup mode, after going to digital experience and selecting all sites, the Customer Service has been created using Customer Service Template.



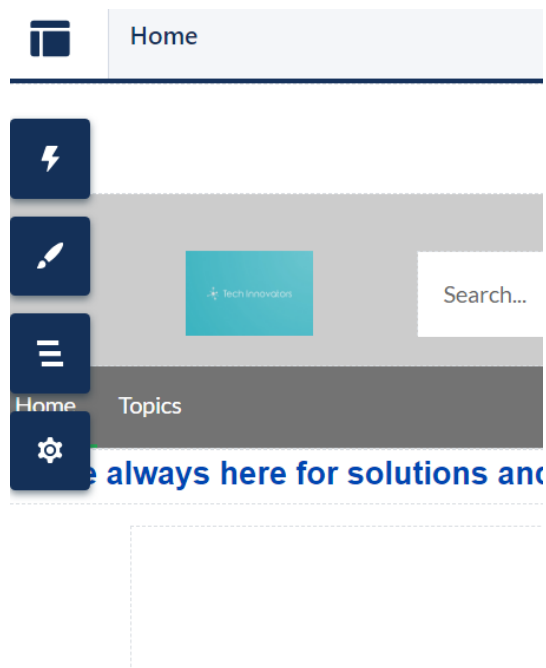
- Then Builder option will be clicked
- The following blue colour line has been edited using Rich Content Editor.



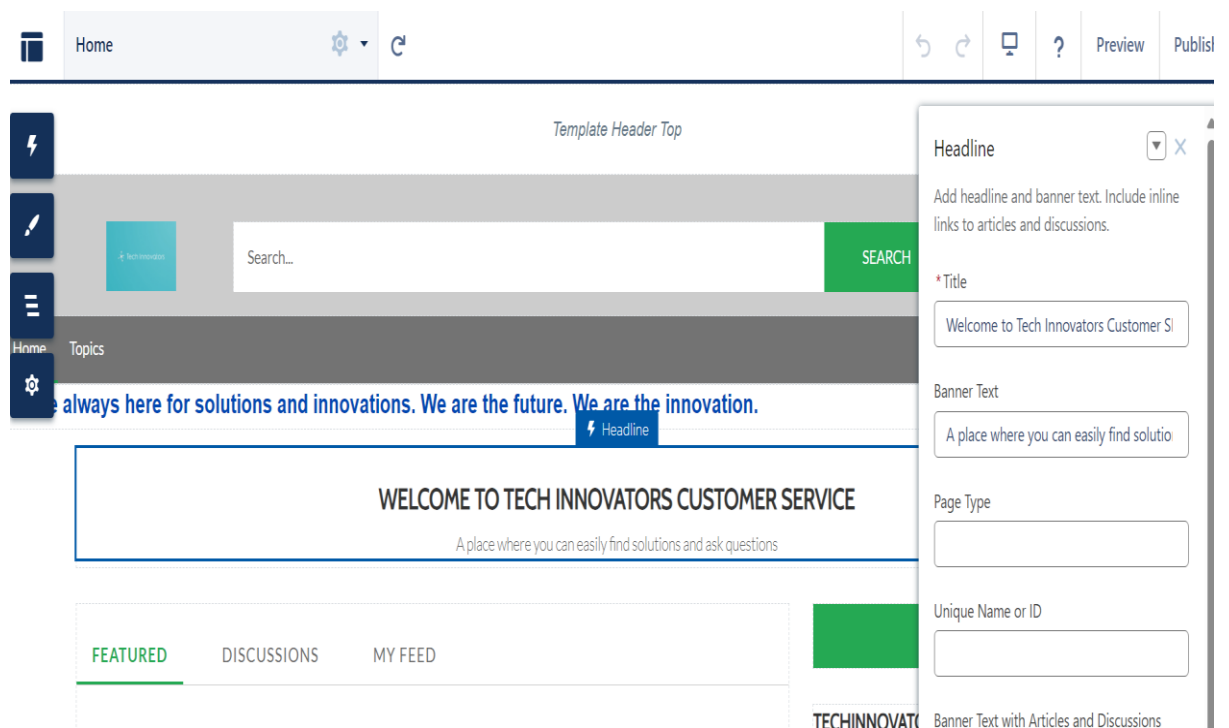
- Under themes section, the imaginary company logo name will be uploaded to the company image



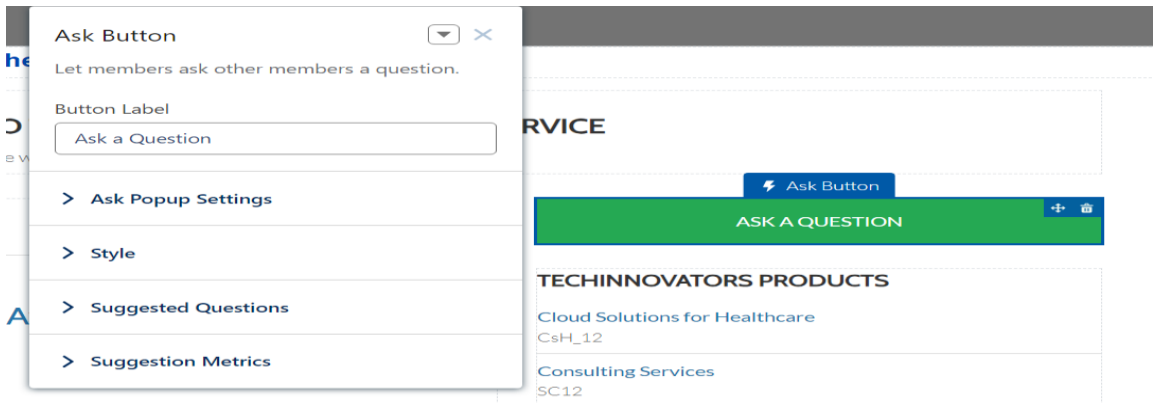
- The company logo has been uploaded successfully



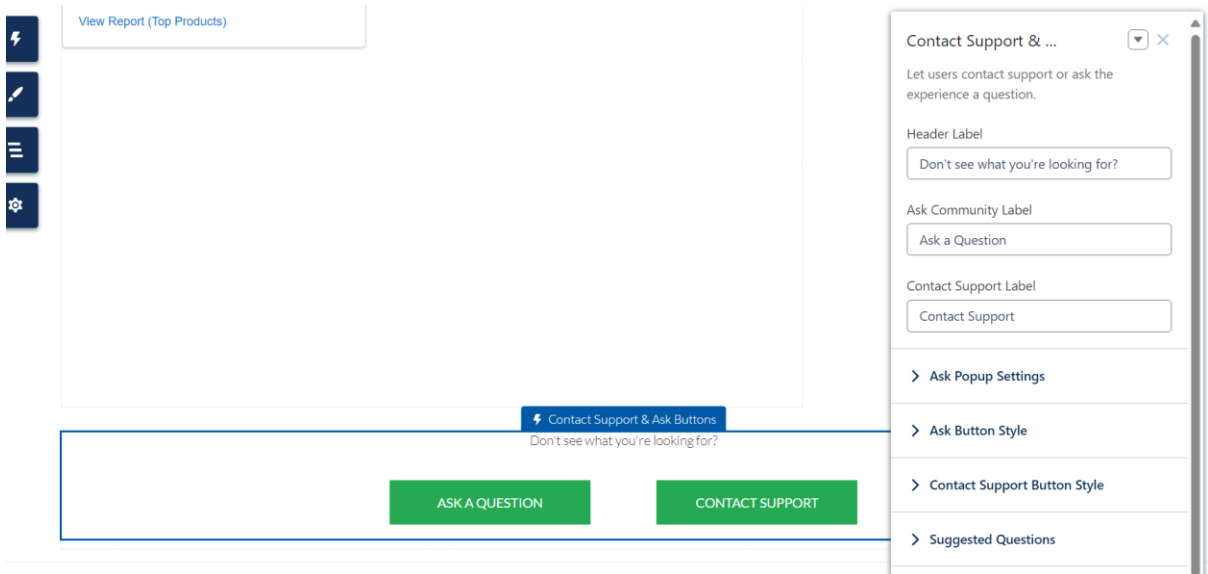
- The headline has been updated.



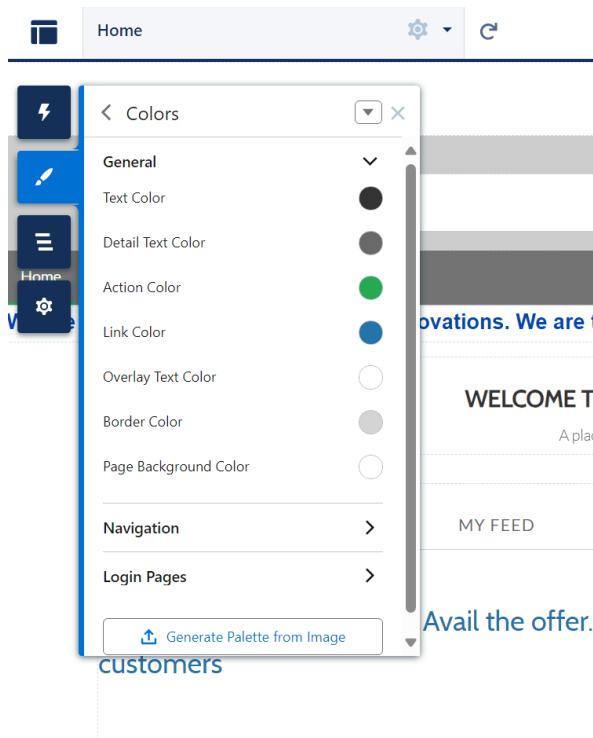
- The ask button has been updated from Components Option



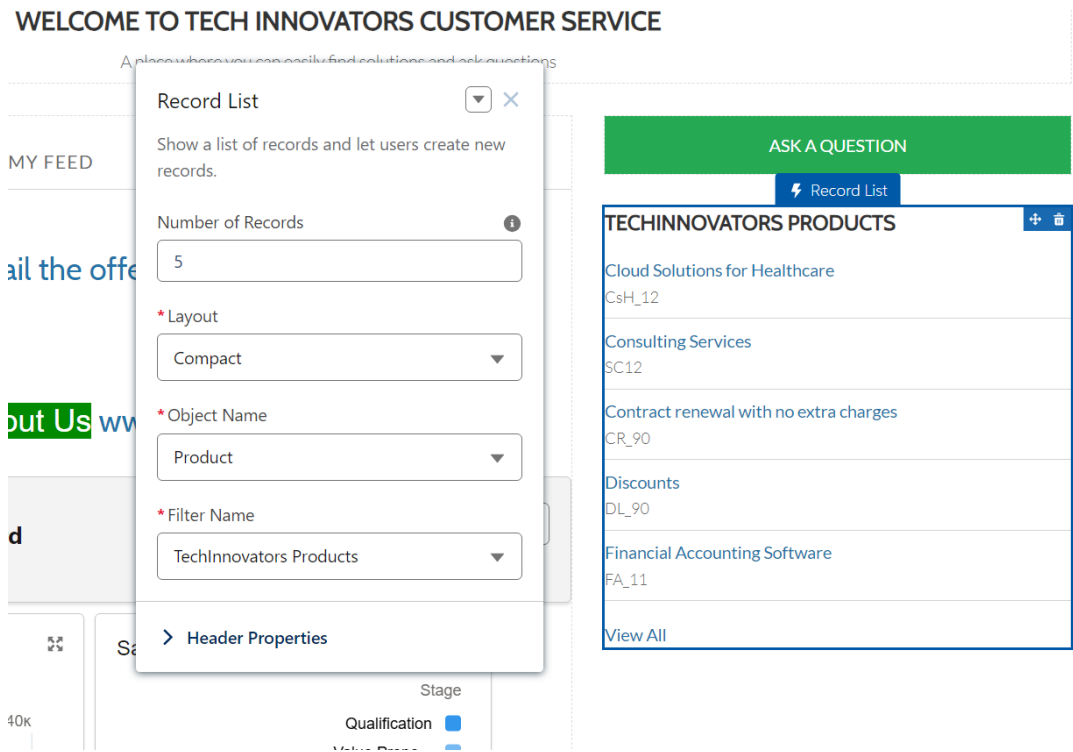
- The following button have also been updated.



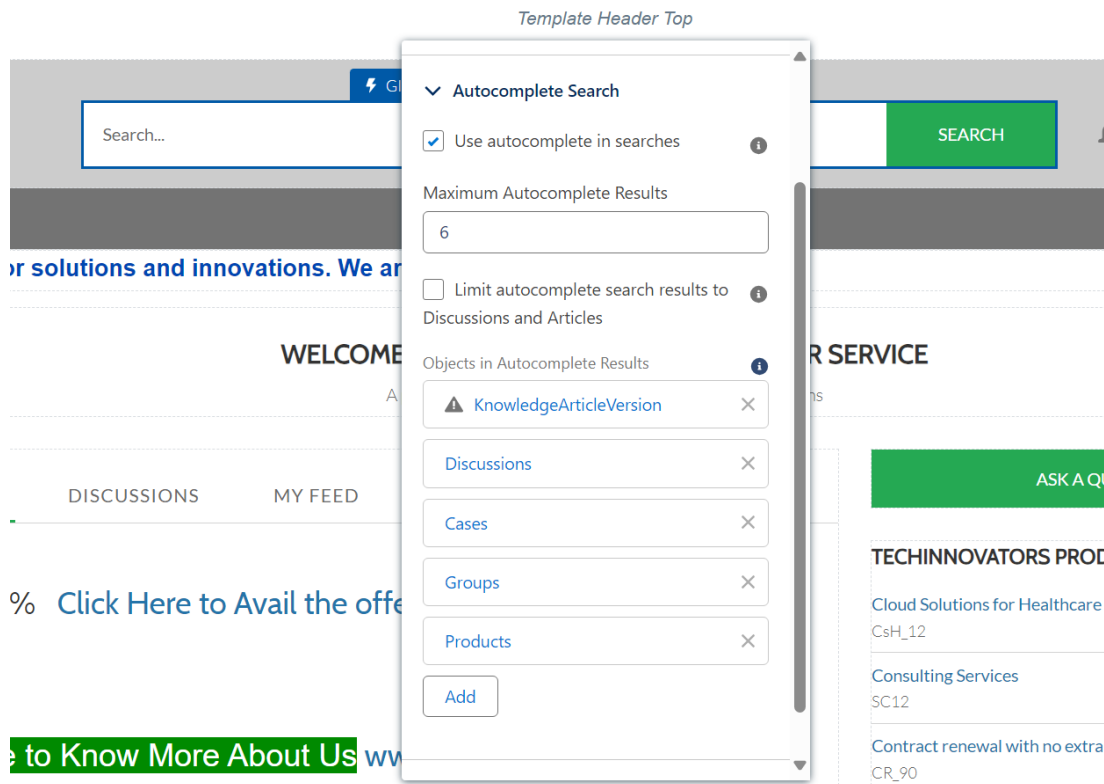
- The action colour has been changed to green colour



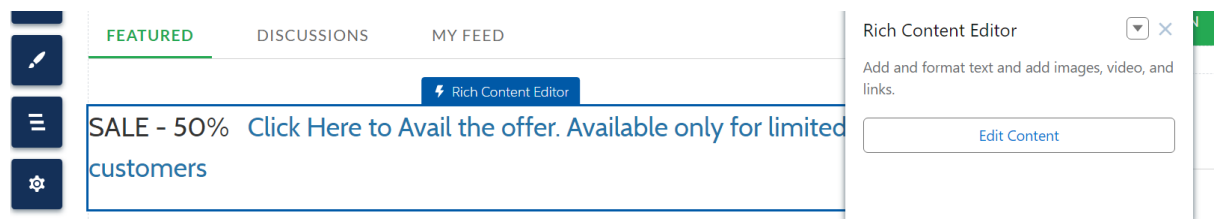
- The record list has been dragged from the Components section and following changes has been made. How the product list is created will be discussed later in the report.



- The Products has been added to the Autocomplete search.



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

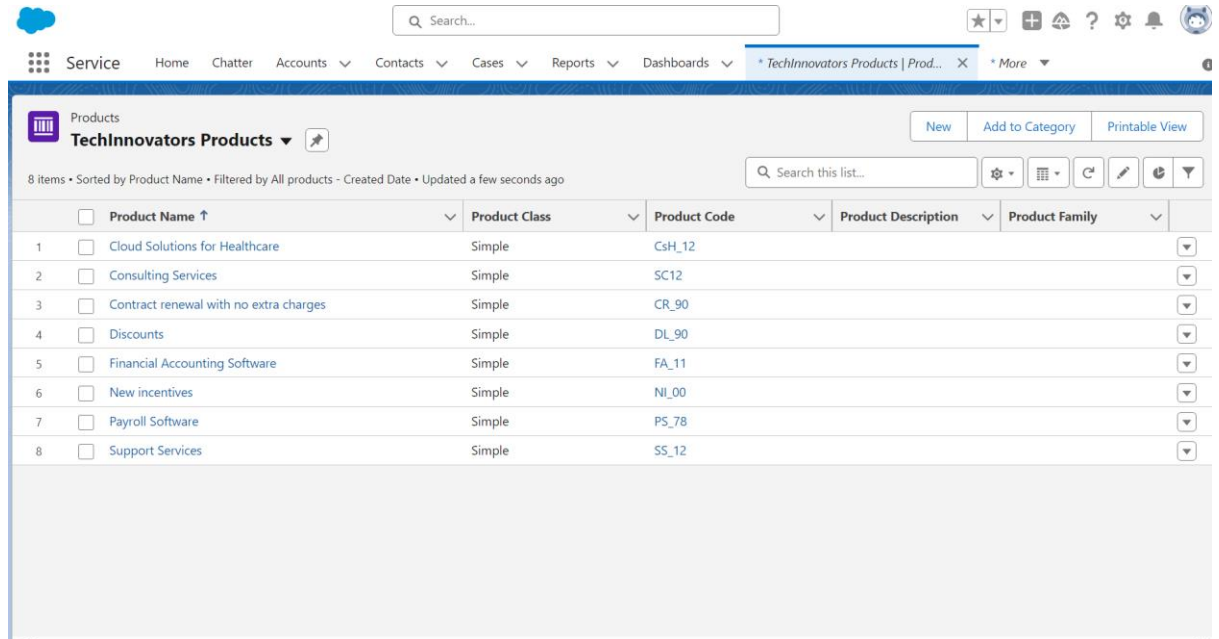


- The following changes have been made using the Rich Content and converted it into hyperlink



## 2. Creating Product List and Catalog

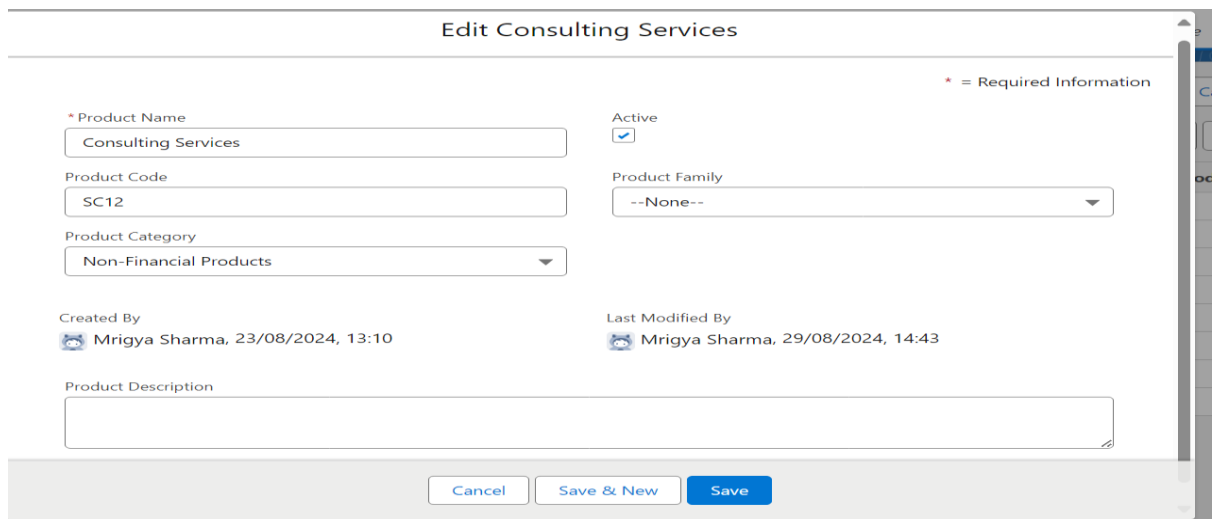
- Under the Salesforce service and selecting the products after cloning the original list, the list has been created after setting filters and renaming it.



The screenshot shows the Salesforce interface for the 'TechInnovators Products' list. The table contains 8 items, sorted by Product Name. Each row includes a checkbox, the product name, product class, product code, product description, and product family.

<input type="checkbox"/>	Product Name ↑	Product Class	Product Code	Product Description	Product Family
<input type="checkbox"/>	Cloud Solutions for Healthcare	Simple	CsH_12		
<input type="checkbox"/>	Consulting Services	Simple	SC12		
<input type="checkbox"/>	Contract renewal with no extra charges	Simple	CR_90		
<input type="checkbox"/>	Discounts	Simple	DL_90		
<input type="checkbox"/>	Financial Accounting Software	Simple	FA_11		
<input type="checkbox"/>	New incentives	Simple	NI_00		
<input type="checkbox"/>	Payroll Software	Simple	PS_78		
<input type="checkbox"/>	Support Services	Simple	SS_12		

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



The screenshot shows the 'Edit Consulting Services' form. It includes fields for Product Name, Product Code, Product Category, Product Family, Active status, Created By, Last Modified By, and Product Description.

**Edit Consulting Services**

\* = Required Information

\* Product Name: Consulting Services

Product Code: SC12

Product Category: Non-Financial Products

Product Family: --None--

Active: ☒

Created By: Mrigya Sharma, 23/08/2024, 13:10

Last Modified By: Mrigya Sharma, 29/08/2024, 14:43

Product Description:

Buttons: Cancel, Save & New, Save

- 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.

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

The screenshot shows a modal window titled "Edit Custom Price Book". Inside, there are several input fields and checkboxes. The "Price Book Name" field is filled with "Custom Price Book". The "Active" checkbox is checked. The "Is Standard Price Book" checkbox is unchecked. Below these, the "Created By" and "Last Modified By" fields both show "Mrigya Sharma" with a timestamp of "29/08/2024, 07:18". At the bottom of the modal are three buttons: "Cancel", "Save & New", and "Save". A small legend in the top right corner of the modal states "\* = Required Information".

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

The screenshot displays a product detail page for "Cloud Solutions for Healthcare". The page header includes navigation links like "Service", "Home", "Chatter", "Accounts", "Contacts", "Cases", "Reports", and "Dashboards". Below the navigation, the product name "Cloud Solutions for Healthcare" is prominently displayed, along with buttons for "New Contact", "New Case", and "Edit". Underneath, the "Product Code" is listed as "CsH\_12" and the "Product Family" is shown. At the bottom of the page, there are two tabs: "Related" and "Details", with "Related" being the active tab.



After selecting standard price book, following changes have been made

HomeChatterAccountsContactsCasesReportsDashboardsCloud Solutions for Healthcare...M...

Edit Cloud Solutions for Healthcare

\* = Required Information

Product

Cloud Solutions for Healthcare

Price Book

Custom Price Book

\* List Price

£2,000.00

Use Standard Price

☐

Last Modified By

Mrigya Sharma, 29/08/2024, 07:21

Active

☒

Product Code

CsH\_12

Created By

Mrigya Sharma, 29/08/2024, 07:21

Cancel

Save & New

Save

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.

ServiceHomeChatterAccountsContactsCasesReportsDashboardsTechInnovators Products | Prod...Custom Price Book | Price Book

Price Book

Custom Price Book

EditCloneDelete

RelatedDetails

Price Book Entries (6+)

Add Products

Product Name	Product Code	List Price	Active	
<a href="#">Cloud Solutions for Healthcare</a>	CsH_12	£2,000.00	<input checked="" type="checkbox"/>	▼
<a href="#">Consulting Services</a>	SC12	£1,000.00	<input checked="" type="checkbox"/>	▼
<a href="#">Contract renewal with no extra charges</a>	CR_90	£0.00	<input checked="" type="checkbox"/>	▼
<a href="#">Discounts</a>	DL_90	£500.00	<input checked="" type="checkbox"/>	▼
<a href="#">Financial Accounting Software</a>	FA_11	£2,500.00	<input checked="" type="checkbox"/>	▼
<a href="#">New incentives</a>	NI_00	£200.00	<input checked="" type="checkbox"/>	▼
View All				

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

The screenshot shows the 'Opportunity' page for 'NHS Swansea'. The top bar includes a '+ Follow' button and buttons for 'New Case', 'New Note', and 'Change Record Type'. Below this, the account details are listed: Account Name: NHS Swansea, Close Date: 14/08/2024, Amount: £2,000.00, and Opportunity Owner: Mrigya Sharma. The main content area is divided into 'Activity', 'Details', and 'Chatter' tabs. The 'Activity' tab is active, showing a list of activities with filters for 'All time', 'All activities', and 'All types'. The 'Related' section on the right shows 'Products (1)' with a dropdown menu for 'Cloud Solutions for Healthcare' and details for Quantity (1.00), Sales Price (£2,000.00), and Date. A 'View All' button is also present.

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

The screenshot shows the 'Add Products' dialog box. The title is 'Add Products' and the subtitle is 'Price Book: Custom Price Book'. There is a search bar labeled 'Search Products...'. Below the search bar, it says 'Show Selected (0)'. A table lists the following products:

<input type="checkbox"/>	Product Name	Product Code	List Price	Product Description	Product Family
<input type="checkbox"/>	Cloud Solutions for Healthcare	CsH_12	£2,000.00		
<input type="checkbox"/>	Consulting Services	SC12	£1,000.00		
<input type="checkbox"/>	Contract renewal with no extra charges	CR_90	£0.00		
<input type="checkbox"/>	Discounts	DL_90	£500.00		
<input type="checkbox"/>	Financial Accounting Software	FA_11	£2,500.00		
<input type="checkbox"/>	New incentives	NI_00	£200.00		
<input type="checkbox"/>	Payroll Software	PS_78	£3,000.00		
<input type="checkbox"/>	Support Services	SS_12	£800.00		

At the bottom right of the dialog box, there are 'Cancel' and 'Next' buttons.

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

Edit Selected Products					
*Product	*Quantity	*Sales Price	Date	Line Description	
1 Cloud Solutions for Healthcare		£2,000.00			

Back
Cancel Save

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

**REPORT** ▼  
 Total Revenue By Product

**Opportunities with Products**

Add

The following filters have been used

**REPORT** ▼  
 Total Revenue By Product

**Opportunities**

Outline
**Filters** 1

Add filter...

Show Me  
**All opportunities**

Close Date  
**All Time**

Opportunity Status  
**Any**

Probability  
**All**

Close Date  
**greater than 30 Jun 2024**

**Pro**  
 Cloud  
**Subto**  
 Consul  
**Subto**  
 Contra  
**Subto**  
 Discou  
**Subto**  
 Financ

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

Columns

Add column...

Opportunity Name

# Amount

Close Date

Stage

# Probability (%)

# Quantity

# Sales Price

# Total Price

Product Date

Product: Month

Product Code

# Active Product

Account Name

Add group...

Opportunity Name

# Amount

Close Date

Stage

# Probability (%)

# Quantity

Edit Column

Summarize

☒ Sum

☐ Average

☐ Max

☐ Min

☐ Median

Cancel

Apply

Subtotal	Extra discount early op
Contract renewal with no extra charges (2)	Cash Convertors - Gold

It has been grouped by Product Name

Outline

Filters 1

Groups

GROUP ROWS

Add group...

Product Name

GROUP COLUMNS

Add group...

The Total Revenue by Product is available in github Folder.

ii) Top Products

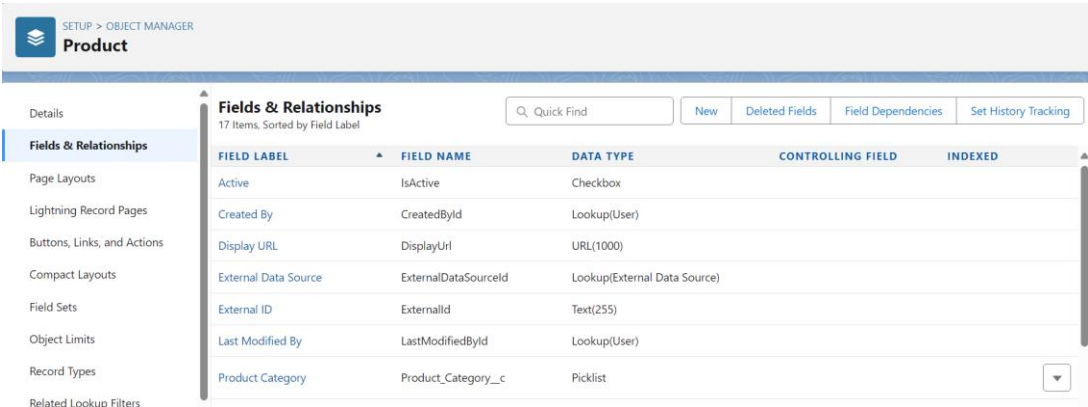
Chart Type: - Pie Chart

Data: - Revenue Distribution by Product Category

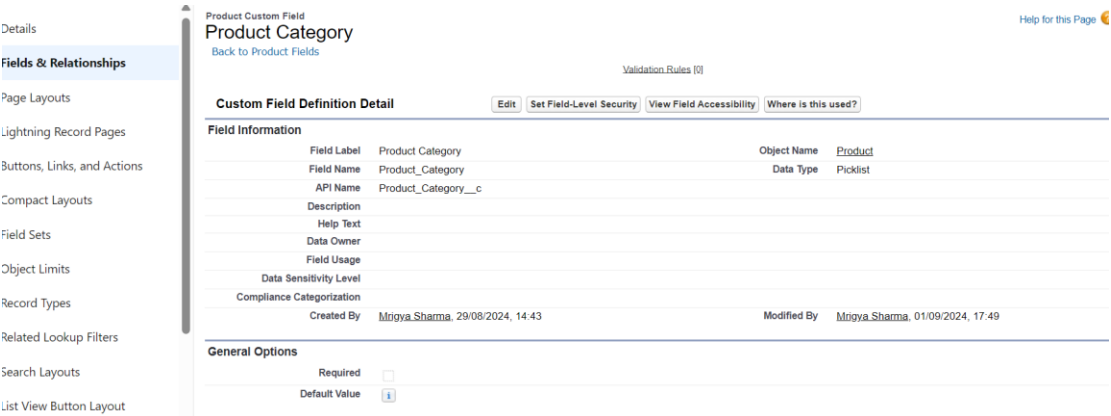
Objective: - Highlight which product categories are generating the most revenue.

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



**Picklist Values Used**

Active and inactive picklist values 2 (1,000 max)

**Field Dependencies**

New

Field Dependencies Help

No dependencies defined.

**Validation Rules**

New

Validation Rules Help

No validation rules defined.

**Values**

New Reorder Replace Printable View Chart Colors

Delete Selected Deactivate Selected Replace Selected

Values Help

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> <div>Edit Del Deactivate</div>	Financial Products	Financial Products	<input type="checkbox"/>	Assigned dynamically	Mrigya Sharma, 29/08/2024, 14:43
<input type="checkbox"/> <div>Edit Del Deactivate</div>	Non-Financial Products	Non-Financial Products	<input type="checkbox"/>	Assigned dynamically	Mrigya Sharma, 29/08/2024, 14:43

**Inactive Values**

Delete Unused Values

Inactive Values Help

No Inactive Values values defined.

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

REPORT

Top Products

Opportunities with Products

The following filters have been used

Outline

Filters 1

Filters

Add filter...

Show Me All opportunities

Close Date All Time

Opportunity Status Any

Probability All

Created Date greater than 30 Jun 2024

Prod

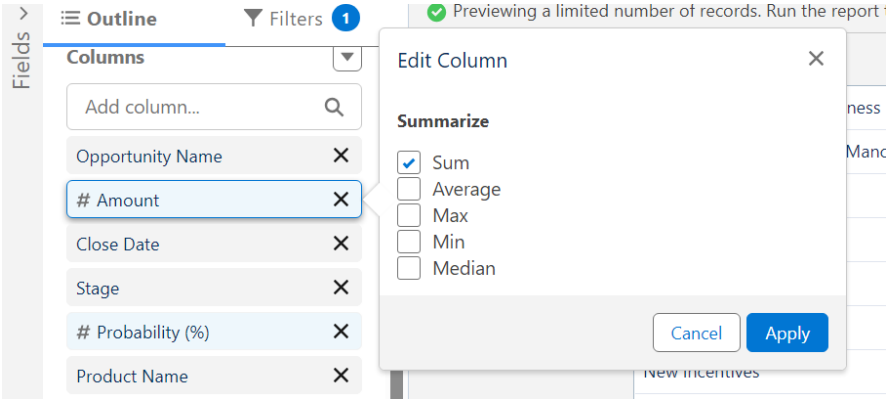
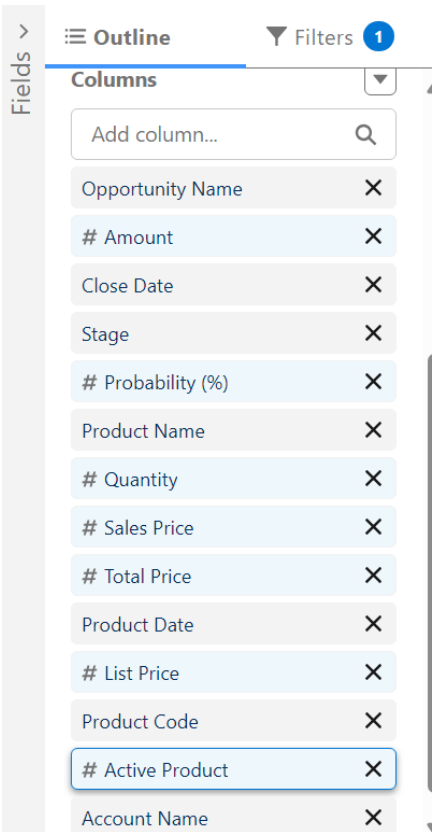
Finar

Subt

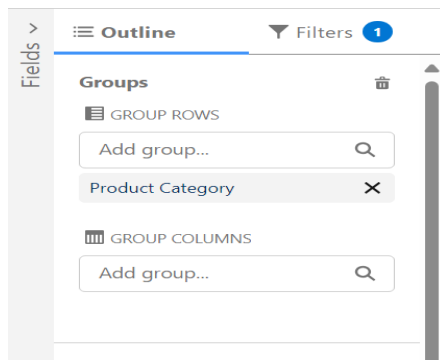
Non-

Row

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.



### Edit Widget

Total Revenue By Product

☐ Use chart settings from report

Display As

Y-Axis

Product Name

X-Axis

Sum of Amount

Preview

Total Revenue By Prc

Product Name

Cloud Solutions for H...  
 Consulting Services  
 Contract renewal with...  
 Discounts  
 Financial Accounting ...  
 New incentives  
 Payroll Software  
 Support Services

View Report (Total Revenue

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.

### Edit Widget

Value

Sum of Amount

Display Units

Shortened Number

Color By

Stage

☒ Show Values  
☒ Show Percentages  
☒ Combine Small Groups into "Others"

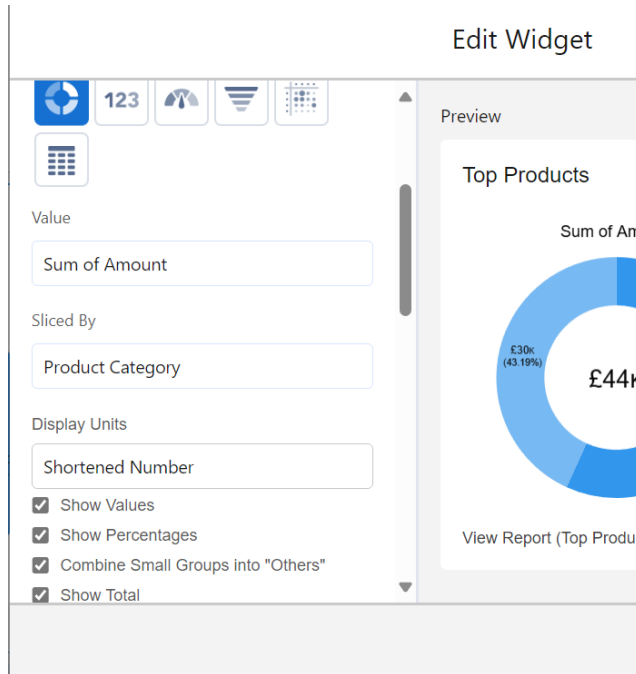
Preview

Sales Pipeline

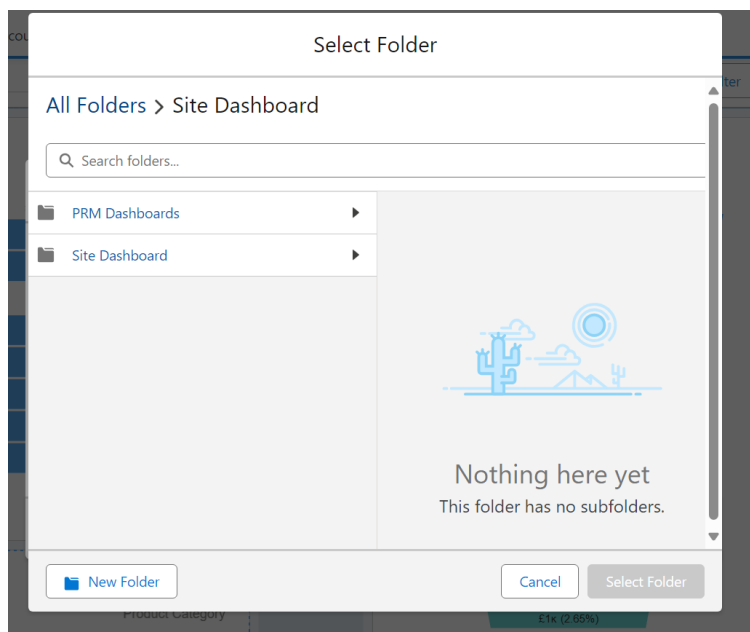
Sum of ,

View Report (Sales

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



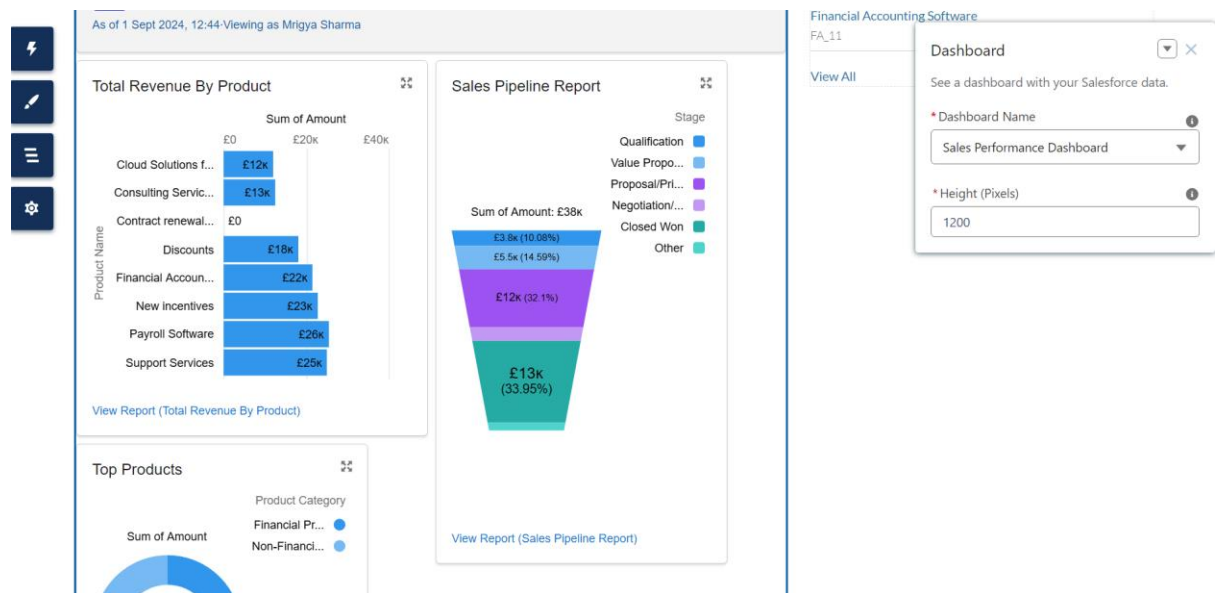
While saving the dashboard, make sure that it is saved to site dashboard because it will be used as a component in builder.



The Dashboard is available in GitHub Folder.

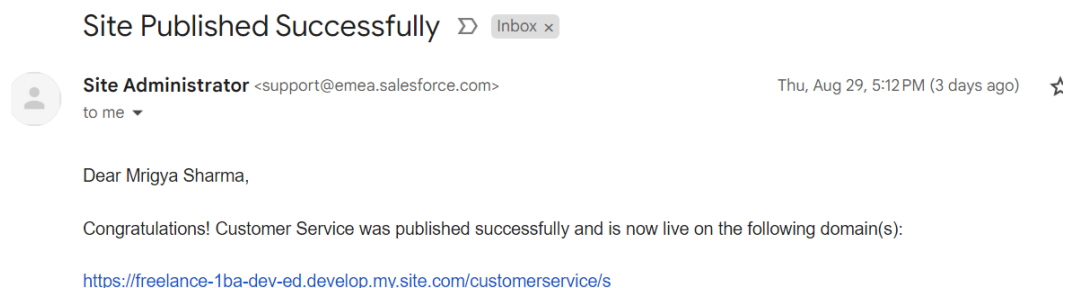
#### v) Adding Dashboard to the Builder site: -

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

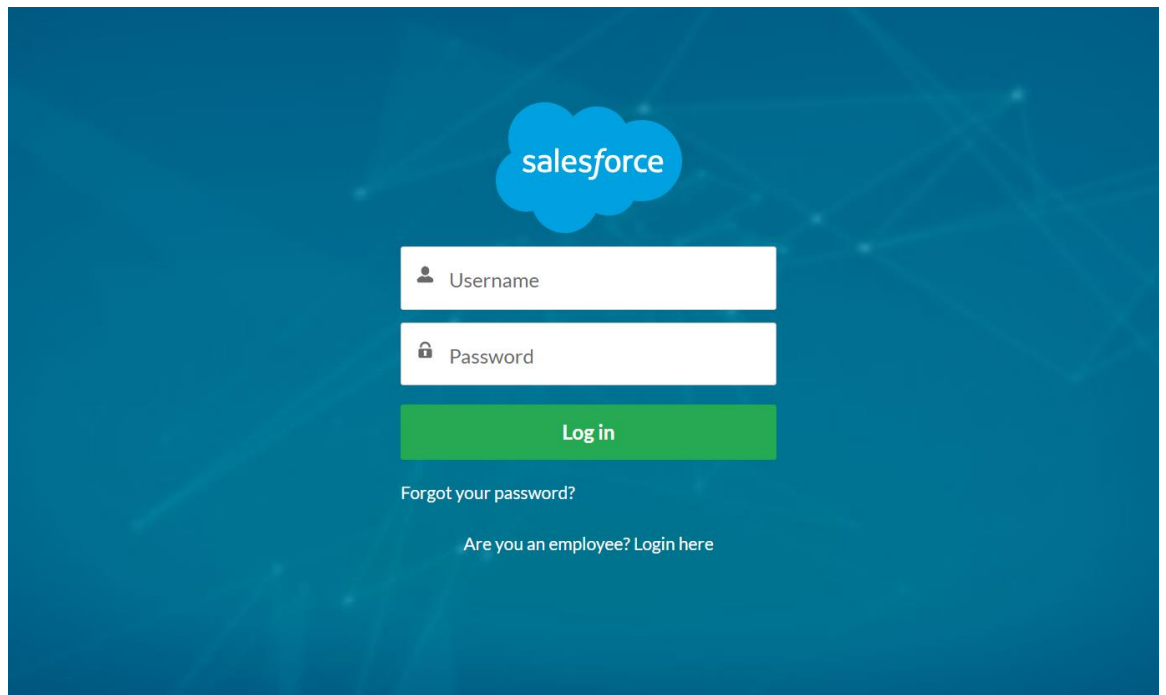


## 4. Publish and Preview the Page

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.