

SALESFORCE FINAL PROJECT

edureka!

Submitted to

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Submitted By

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1st Project:

Goal : To serve faster customer service in any mobile industry through Salesforce Service Cloud Application.

Modules used :

- 1) Accounts**
- 2) Contacts**
- 3) Opportunities**
- 4) Price Books**
- 5) Products**
- 6) Cases**
- 7) Case Escalation Rule**
- 8) Web to Case**
- 9) Email to case**
- 10) Case Assignment rules**
- 11) Queues**
- 12) Public Groups**
- 13) SLA's**
- 14) Email templates**
- 15) SLA Violation**

Relationships: ‘

Look up : Account - opp

Contact - opp

Accounts:

The screenshot shows the Salesforce Lightning interface for the Accounts module. The top navigation bar includes Service, Home, Chatter, Accounts (selected), Contacts, Cases, Reports, Dashboards, Positions, Job_Applications, Interviewers, Job_Portals, and More.

The main content area displays a list titled "Recently Viewed" with 7 items, updated 12 minutes ago. The columns are Account Name, Account Site, Phone, Account Owner, Active, Last Modified Date, and Last Modified By. The data is as follows:

	Account Name	Account Site	Phone	Account Owner	Active	Last Modified Date	Last Modified By
1	EY Mobile point			SSidd	1	1/25/2024, 8:18 PM	SSidd
2	Renuka Cell Point	(324) 678-5432		SSidd	1	1/25/2024, 8:13 PM	SSidd
3	Burlington Textiles Corp of America	(336) 222-7000		SSidd	1	11/4/2023, 5:48 PM	SSidd
4	Amazon	(303) 657-8965		SSidd	1	12/2/2023, 6:38 PM	SSidd
5	Kiran			SSidd	1	1/25/2024, 8:10 PM	SSidd
6	Mouni T-mobile			SSidd	1	1/25/2024, 8:06 PM	SSidd
7	Ravi Kumar Cell Point	(234) 567-8956		SSidd	1	1/25/2024, 7:38 PM	SSidd

Contacts:

The screenshot shows the Salesforce Lightning interface for the Contacts module. The top navigation bar includes Sales, Home, Campaigns, Leads, Accounts, Contacts (selected), Opportunities, Tasks, Files, Dashboards, Reports, Chatter, Groups, and More.

The main content area displays a list titled "Intelligence View" with 4 items, filtered by Created Date, Me, Total Contacts. The columns are Name, Title, Account Name, Last Activity, and Actions. The data is as follows:

Name	Title	Account Name	Last Activity	Actions
Shyam L		EY Mobile point		[Email, Phone]
Mounika L		Mouni T-mobile	1/25/2024	[Email, Phone]
Sneha Chowdary		Ravi Kumar Cell Point		[Email, Phone]
Renuka Naidu		Renuka Cell Point		[Email, Phone]

Opportunities:

Sales Home Campaigns Leads Accounts Contacts Opportunities Tasks Files Dashboards Reports Chatter Groups More

Opportunity 100%

+ Follow New Case New Note Submit for Approval

Change Closed Stage

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 activities to show. Get started by sending an email, scheduling a task, and more.

January • 2024 This Month

Call You logged a call with Mounika L Today

No more past activities to load.

To Do List

Related

Products (1)

Apple 15 pro
Quantity: 2.00
Sales Price: \$45,631.00
Date:

[View All](#)

Notes & Attachments (0)

[Upload Files](#)

Pricebooks:

Sales Home Campaigns Leads Accounts Contacts Opportunities Tasks Files Dashboards Reports * Mobile Pricebook More

Price Book **Mobile Pricebook**

Edit Clone Delete

Related Details

Price Book Entries (4)

Product Name	Product Code	List Price	Active
Apple 14 pro	45678	\$34,680.00	<input checked="" type="checkbox"/>
Apple 15 pro	12345	\$45,631.00	<input checked="" type="checkbox"/>
Samsung Flip 4 Z	23456	\$56,321.00	<input checked="" type="checkbox"/>
Sony Z	2345	\$23,451.00	<input checked="" type="checkbox"/>

[View All](#)

Price Book History (1)

Date	Field	User	Original Value	New Value
1/25/2024, 7:53 PM	Created.	Sai Lokesh Siddanathi		

Products:

The screenshot shows a Salesforce interface for the 'Products' category. At the top, there's a search bar and a navigation bar with links like Sales, Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Tasks, Files, Dashboards, and Recently Viewed / Products. Below the navigation is a section titled 'Recently Viewed' with a dropdown arrow. It displays four items: Samsung Flip 4 Z, Sony Z, Apple 15 pro, and Apple 14 pro. Each item has columns for Product Name, Product Class, Product Code, Product Description, and Product Family. A 'Search this list...' bar and various edit and filter icons are also present.

Email to case setup :

If any customer complaints through email automatically, a case is created accordingly.

The screenshot shows a Salesforce interface for creating a new case. The top navigation bar includes Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Positions, Job_Applications, Interviewers, Job_Portals, and More. The main area is titled 'Case urgent query on product'. It features a text input field for 'Share an update...' with a 'Share' button, and a 'Most Recent Activity' feed with a search bar. Below this is a 'All Updates' tab and a list of recent activity entries. One entry from 'Sai Lokesh S' is shown, dated December 17, 2023 at 1:47 PM. The message reads: 'Hi team I have issue on my iphone. please resolve thanks xyz'. Below the message are buttons for Reply, Reply All, Forward, and Comment. To the right of the activity feed is a detailed case record form with fields for Case Number (00001030), Priority (High), Contact Name (Sai Lokesh S), Contact Phone, Account Name, Contact Email, Type, Case Origin, Email, Case Reason, Web Email (lokesh.edureka@gmail.com), Web Company, Web Name (Sai Lokesh S), Web Phone, Date/Time Opened (12/17/2023, 1:47 PM), Date/Time Closed, Product, Engineering Req Number, Potential Liability, and SLA Violation.

Email to case setup screenshot:

The screenshot shows the Salesforce Setup interface with the following details:

- Left Sidebar:** Shows the navigation menu under "Email" with "Email-to-Case" selected.
- Header:** "Search Setup" and various setup icons.
- Page Title:** "SETUP Email-to-Case"
- Send Emails from Cases:**
 - Send emails via external services:
 - Insert email threading token in email subject:
 - Insert email threading token in email body:
 - Place user signatures before email threads:
- On-Demand Service:**
 - Let Salesforce handle incoming emails for you. The Email-to-Case on-demand service converts customer emails into cases or adds them to existing cases.
 - Enable on-demand service:
- Routing Addresses:**

Action	Source	Routing Name	Case Owner	Email Address	Verification	Outbound Service	Email Services Address
Edit Del	Email2Case	AMER-SUPPORT	Q1	siddanathi.lokesh.17mec@bml.edu.in	Verified	Salesforce	siddanathi.lokesh.17mec@2-1x2 0c5dxpx23sl8su95odwl8szaphnyjn5mov6xor95w318ai.hn-1r9zemas.na231.case.salesforce.com

Phone to case :

Through phone call if customer faces any issues then case is automatically created

The screenshot shows the Salesforce Case detail page with the following details:

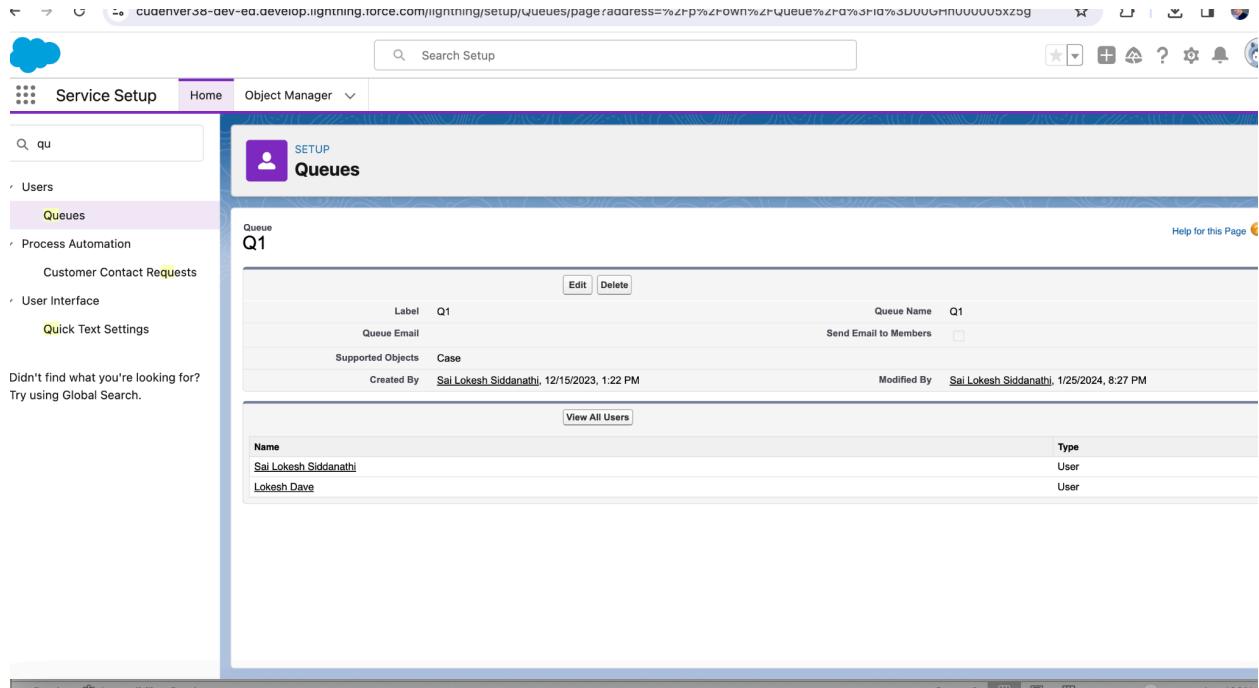
- Header:** "Search..." and various case management icons.
- Page Title:** "Cases
- Feed:**
 - Post, Email, Poll
 - Share an update... button
 - Share button
 - Most Recent Activity: December 15, 2023 at 1:23 PM
 - Search this feed... button
- All Updates:**
 - Sai Lokesh Siddanathi: Case created
 - Subject: Priority: Medium
 - Status: New
 - Case Number: 00001027
- Details:**

Case Owner	Sai Lokesh Siddanathi	Status	New
Case Number	00001027	Priority	Medium
Contact Name	Sonali R	Contact Phone	(303) 657-8965
Account Name	Amazon	Contact Email	sonali@amazon1.com
Type		Case Origin	Phone
Case Reason		Web Email	Web Company
Web Name		Web Phone	Web Phone
Date/Time Opened		Date/Time Closed	

Case Assignment rules:

Queues:

It is generally used to assign the ownership related to the case.



The screenshot shows the Salesforce Setup interface for managing Queues. The left sidebar has a search bar and navigation links for Service Setup, Home, Object Manager, and various system settings. The main content area is titled 'Queues' and shows a single queue named 'Q1'. The queue details are as follows:

Label	Q1	Queue Name	Q1
Queue Email		Send Email to Members	<input type="checkbox"/>
Supported Objects	Case	Created By	Sai Lokesh Siddanathi, 12/15/2023, 1:22 PM
Modified By	Sai Lokesh Siddanathi	Modified	1/25/2024, 8:27 PM

Below the details, there is a section titled 'View All Users' which lists the members of the queue:

Name	Type
Sai Lokesh Siddanathi	User
Lokesh Dave	User

Case Escalation rule :

If the case has high priority then support agent cant be able to respond it is going to escalate to the support manager so that he can respond

Service Setup

Object Manager

Search Setup

Escalat

Process Automation

Escalation Rules

Case Escalation Rule

Case

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

Rule Detail	
Rule Name: Case Created By: Sai Lokesh Siddanath, 1/25/2024, 8:50 PM	Active: ✓ Modified By: Sai Lokesh Siddanath, 1/25/2024, 8:59 PM

Action	Order	Criteria	Rule Entries Help
Edit Del	1	(Case: Priority EQUALS High) AND (Case: Business Hours GREATER OR EQUAL Default) AND (Case: Status EQUALS New)	?

Service Setup

Object Manager

Search Setup

assi

Multi-Factor Authentication Assistant

Channels

Email

Classic Email Templates

Process Automation

Case Assignment Rules

Assignment Rules

Didn't find what you're looking for?
Try using Global Search.

Standard

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

Rule Detail	
Rule Name: Standard Created By: Sai Lokesh Siddanath, 11/4/2023, 5:48 PM	Active: ✓ Modified By: Sai Lokesh Siddanath, 1/25/2024, 9:27 PM

Action	Order	Criteria	Assign To	Email
Edit Del	1	(Case: Case Reason EQUALS Installation) AND (Case: Status EQUALS New)	Q1	<input checked="" type="checkbox"/>
Edit Del	2	(Account: Billing Country EQUALS US,USA,United States,United States of America) AND (Account: SLA EQUALS Gold,Platinum) AND (Account: Type CONTAINS Customer)	Sai Lokesh Siddanath	<input type="checkbox"/>
Edit Del	3	(Account: Billing Country EQUALS US,USA,United States,United States of America) AND (Account: SLA EQUALS Silver,Bronze) AND (Account: Type CONTAINS Customer)	Sai Lokesh Siddanath	<input type="checkbox"/>
Edit Del	4	(Account: Billing Country NOTEQUAL TO US,USA,United States,United States of America) AND (Account: SLA EQUALS Gold,Platinum) AND (Account: Type CONTAINS Customer)	Sai Lokesh Siddanath	<input type="checkbox"/>
Edit Del	5	(Account: Billing Country NOTEQUAL TO US,USA,United States,United States of America) AND (Account: SLA EQUALS Silver,Bronze) AND (Account: Type CONTAINS Customer)	Sai Lokesh Siddanath	<input type="checkbox"/>
Edit Del	6	Account: Type CONTAINS Partner	Sai Lokesh Siddanath	<input type="checkbox"/>

SLA's violation :

In order to solve any issue a certain time frame is needed. If the issue is not solved then it is termed as SLA violated

Live Case Assignment:

10:37



...

Case transferred to you.

Inbox



Case Notification 10:30 PM



...

to me, lokesh.edureka@gm... ▾

Case 00001031 has been assigned to you.
Please click on the link below to view the record.

<https://cudenver38-dev-ed.development.my.salesforce.com/500Hn00001br9JI>

10:37



...

Case escalation email notification

Inbox



Case Notification 10:30 PM



...

to me ▾

A case was escalated. Click the link to review.

<https://cudenver38-dev-ed.development.my.salesforce.com/500Hn00001br9JI>

Project-2:

Goal : To launch an app that is very useful for the HR team of any organization to track all the job postings, candidates and recruiters.

Objects:

- 1) Job Postings
- 2) Candidates
- 3) Interviewers
- 4) Job Application
- 5) HR Manager
- 6) Work flows
- 7) Approval

Interviewer & Candidate - Look up

Job Application & Candidate - Look up

Job Application & Interviewer - Look up

Candidate & offer letter - Look up

The screenshot shows a Salesforce Lightning interface for a candidate named 'Sai Mounika L'. The top navigation bar includes links for Recruitment, Positions, Candidates, Interviewers, Hiring Managers (Users), Job_Applications, Job_Portals, Course Offerings, Feedbacks, and More. The main content area displays the candidate's profile with a photo, name, and contact information. Below the profile, there are three sections: 'Job_Applications (2)', 'Offer Letters (1)', and 'Interviewers (0)'. Each section has a 'New' button and a 'View All' link. The background features a blue gradient with white contour lines.

The screenshot shows the Salesforce Lightning interface for the 'Recruitment' tab. The top navigation bar includes links for Positions, Candidates, Job_Applications, Interviewers, Job_Portals, Course Offerings, Hiring Managers (Users), Feedbacks, and More. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a header for 'Positions Recently Viewed' with a downward arrow and a refresh icon. A sub-header indicates '3 items • Updated a few seconds ago'. The main content area displays a table with three rows, each containing a checkbox and a position name: 1. Business Analyst (BA), 2. Sales Admin SA, and 3. Marketing Manager. To the right of the table are several icons for New, Import, Change Owner, and search/filter functions. The bottom of the page features a standard browser footer with links like Home, Help, and Log Out.

2) Candidates

The screenshot shows the Salesforce Lightning interface for the 'Candidates' tab. The top navigation bar includes links for Positions, Candidates, Job_Applications, Interviewers, Job_Portals, Course Offerings, Hiring Managers (Users), Feedbacks, and More. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a header for 'Candidates Recently Viewed' with a downward arrow and a refresh icon. A sub-header indicates '3 items • Updated a few seconds ago'. The main content area displays a table with three rows, each containing a checkbox and a candidate name: 1. Ketha R, 2. Puneeth Varma, and 3. Sai Mounika L. To the right of the table are several icons for New, Import, Change Owner, and search/filter functions. The bottom of the page features a standard browser footer with links like Home, Help, and Log Out.

3) Interviewers:

A screenshot of a web browser showing a list titled "Interviewers Recently Viewed". The list contains one item, "Tagore", which was updated a few seconds ago. The interface includes a search bar at the top, a toolbar with various icons, and a "Change Owner" button.

8) Job Applications:

A screenshot of a web browser showing a list titled "Job Applications Recently Viewed". The list contains three items: "j34", "Test1", and "Test 3", all of which were updated a few seconds ago. The interface includes a search bar at the top, a toolbar with various icons, and a "Change Owner" button.

9) Workflow

If the candidate is selected through a job application then the email candidate is selected.
If the candidate is rejected then send one email template stating the candidate is rejected.

Workflow Rules

Edit Rule selected

Step 3: Specify Workflow Actions

Rule Criteria: Job_Application: Status EQUALS Selected

Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

Action	Type	Description
Edit Remove	Email Alert	send_email_selected

Add Workflow Action

Time-Dependent Workflow Actions

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

Workflow Rules

Edit Rule rejected

Step 3: Specify Workflow Actions

Rule Criteria: Job_Application: Status EQUALS Rejected

Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

Action	Type	Description
Edit Remove	Email Alert	rejection mail

Add Workflow Action

Time-Dependent Workflow Actions

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger