SALESFORCE FINAL PROJECT

Submitted to

Professor: Dr. Aditi Podda

Submitted By

Sai Lokesh Siddanathi

1st Project:

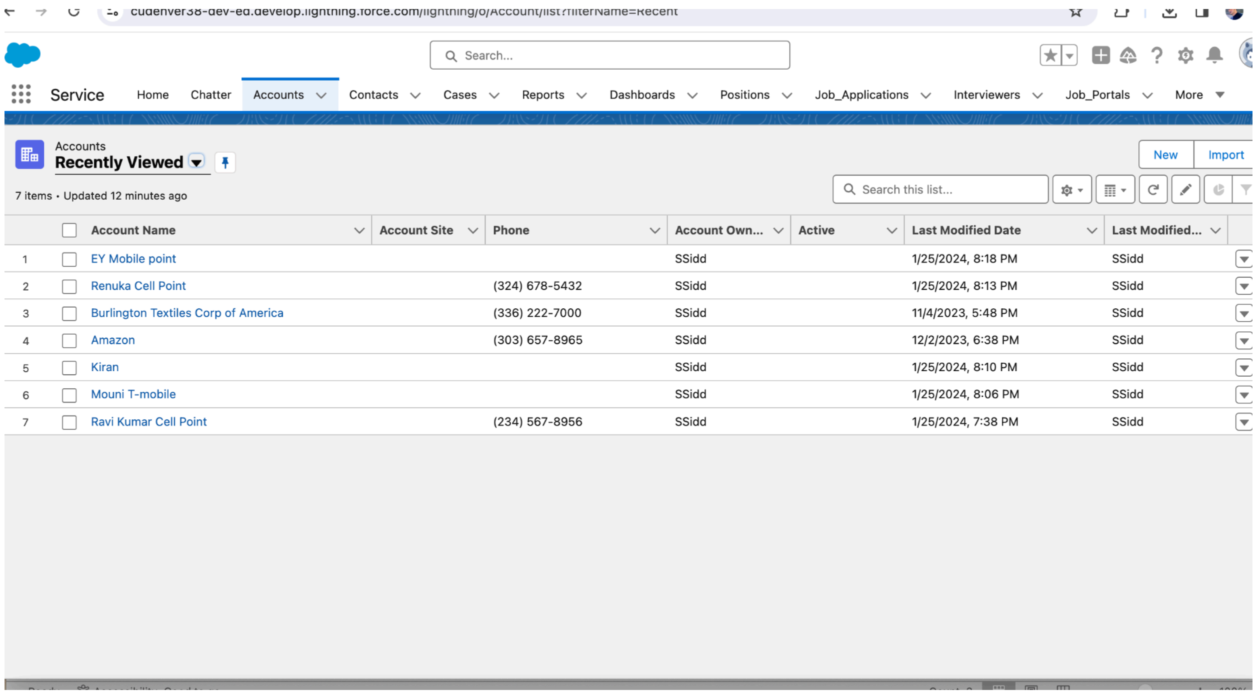
Goal : To serve faster customer service in any mobile industry through Salesforce Service Cloud Application.

Modules used :

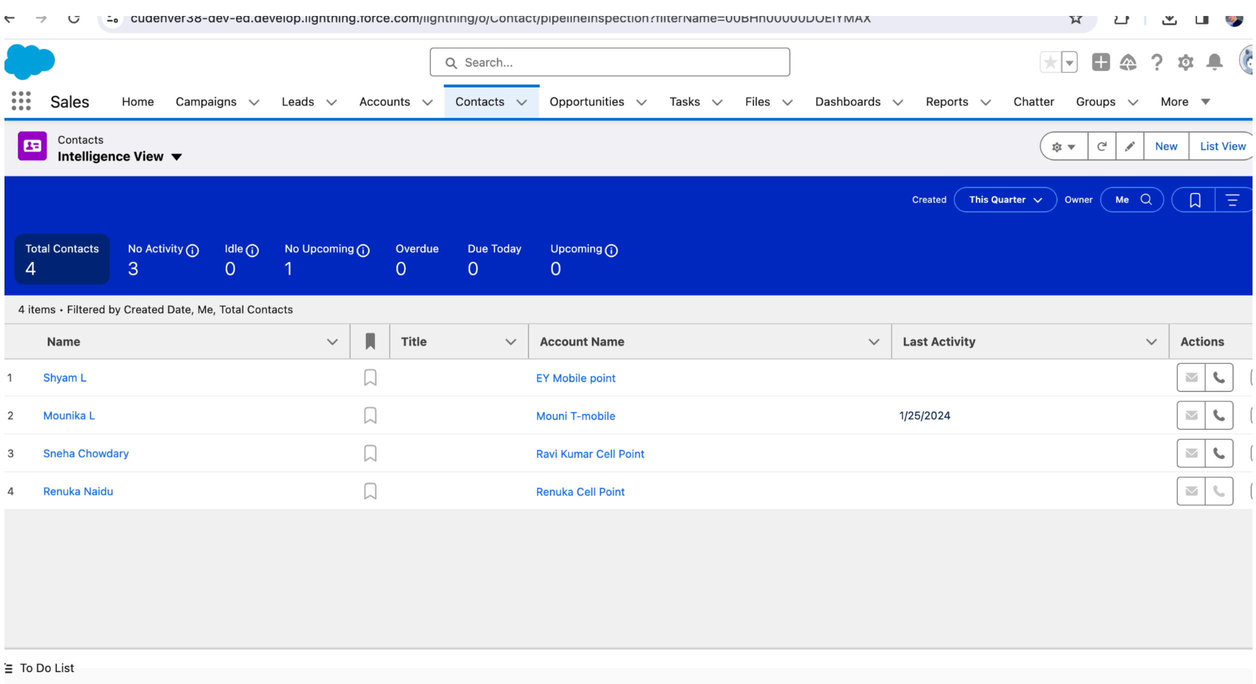
1) Accounts
2) Contacts
3) Opportunities
4) Price Books
5) Products
6) Cases
7) Case Escalation Rule
8) Web to Case
9) Email to case
10) Case Assignment rules
11) Queues
12) Public Groups
13) SLA's
14) Email templates
15) SLA Violation

Relationships: '
Look up : Account - opp
Contact - opp

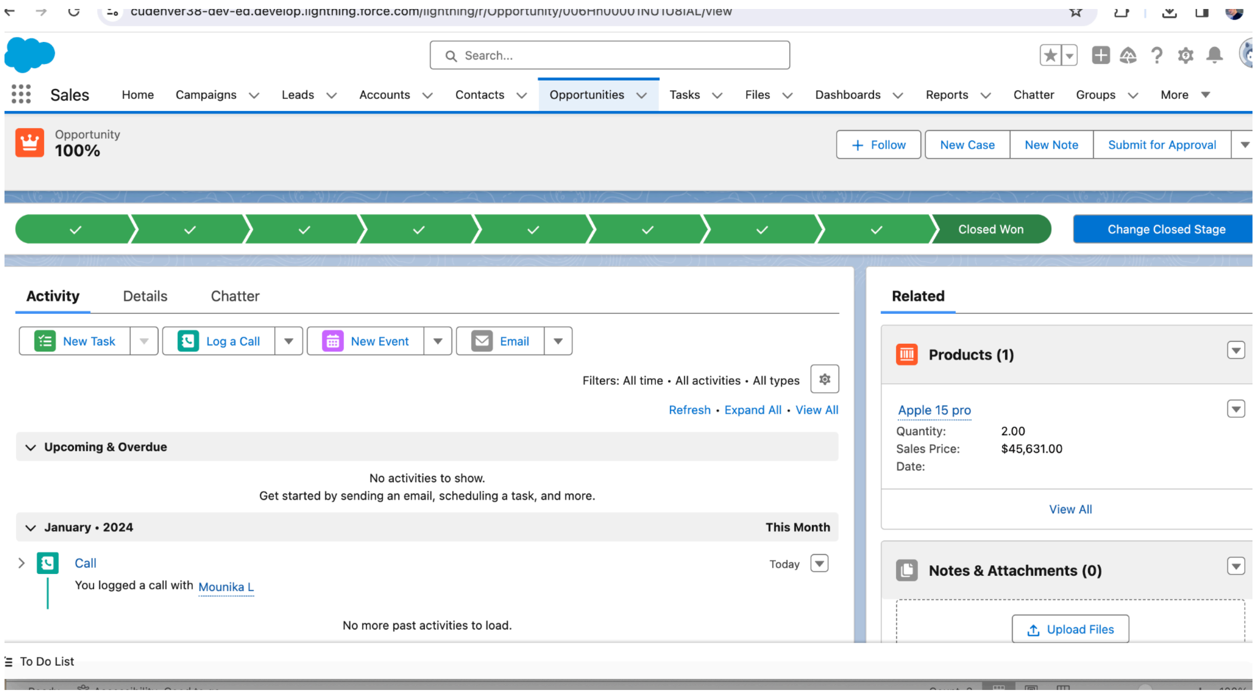
Accounts:



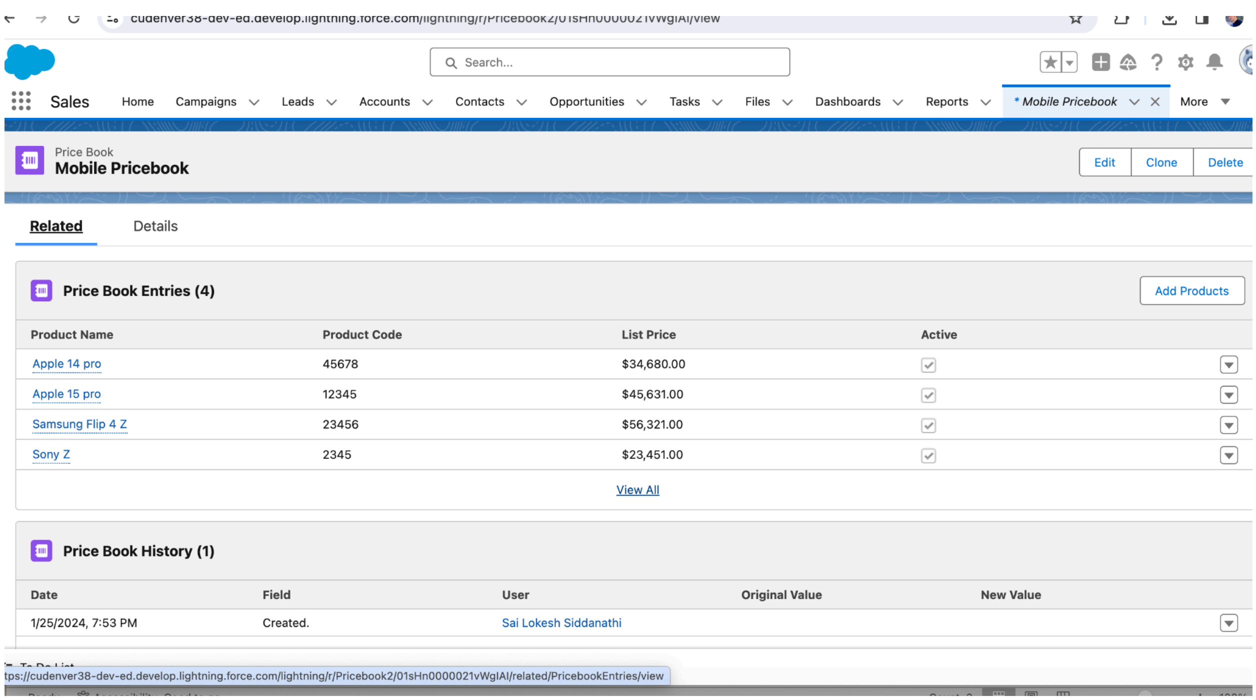
Contacts:



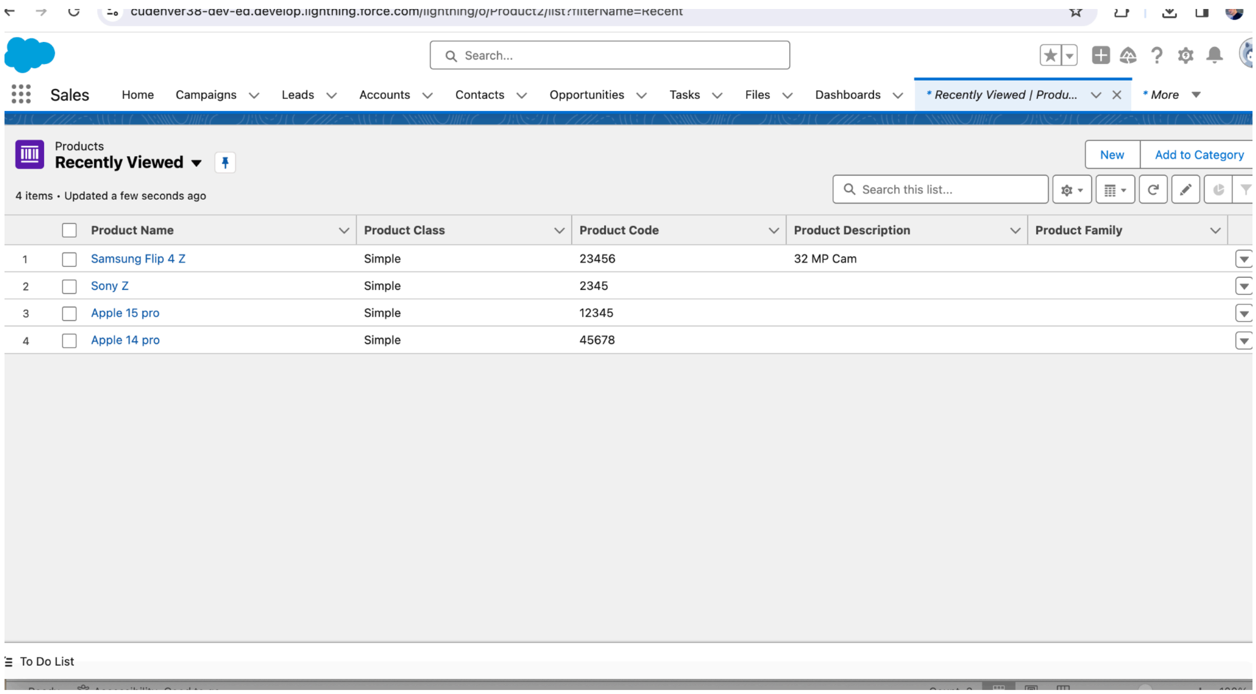
Opportunities:



Pricebooks:

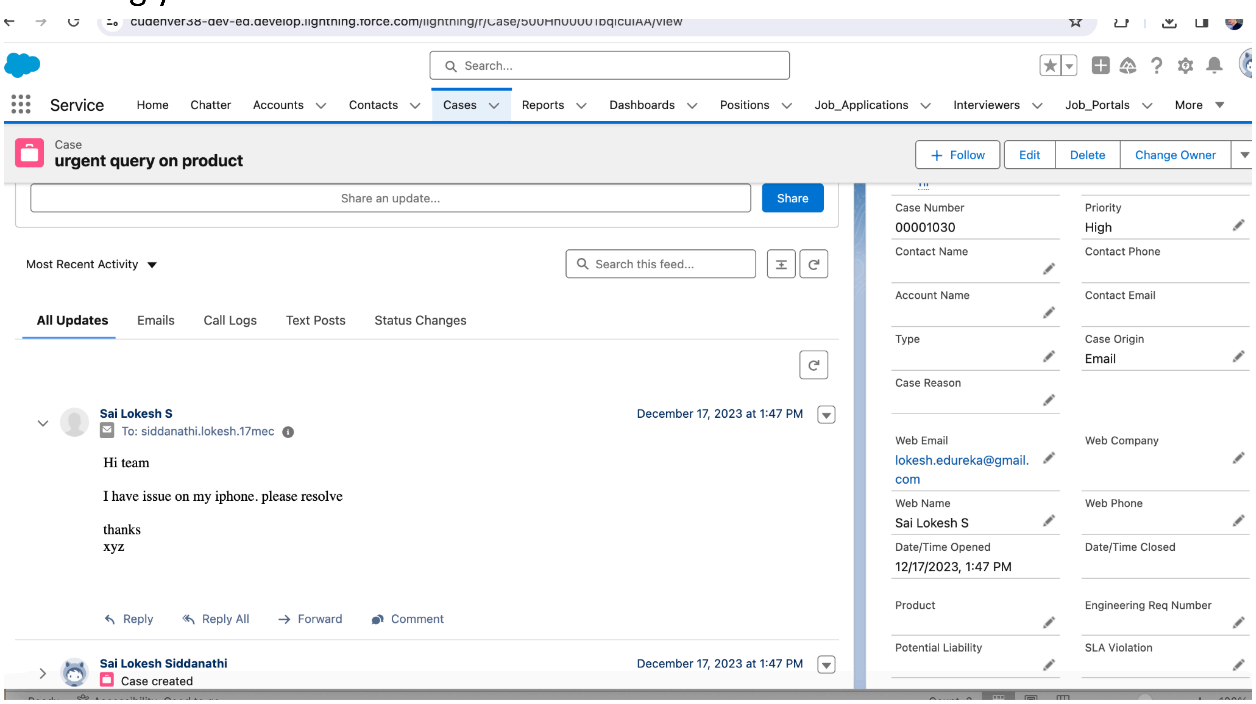


Products:

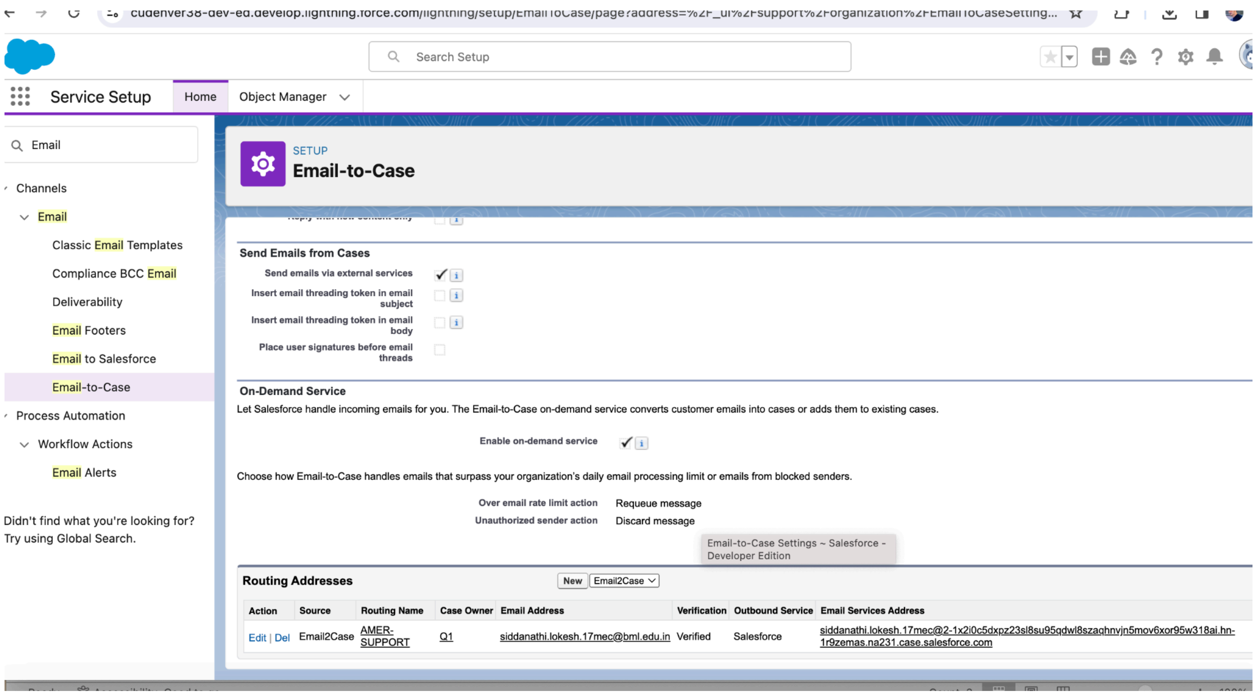


Email to case setup :

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

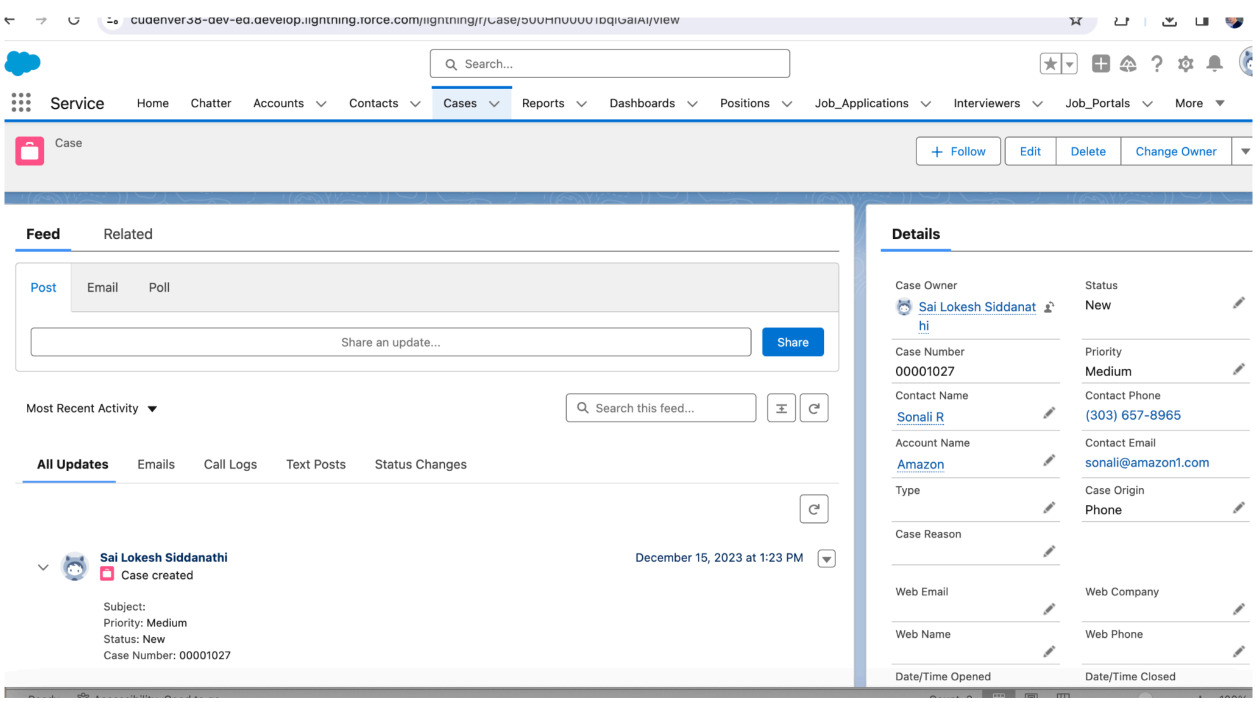


Email to case setup screenshot:



Phone to case :

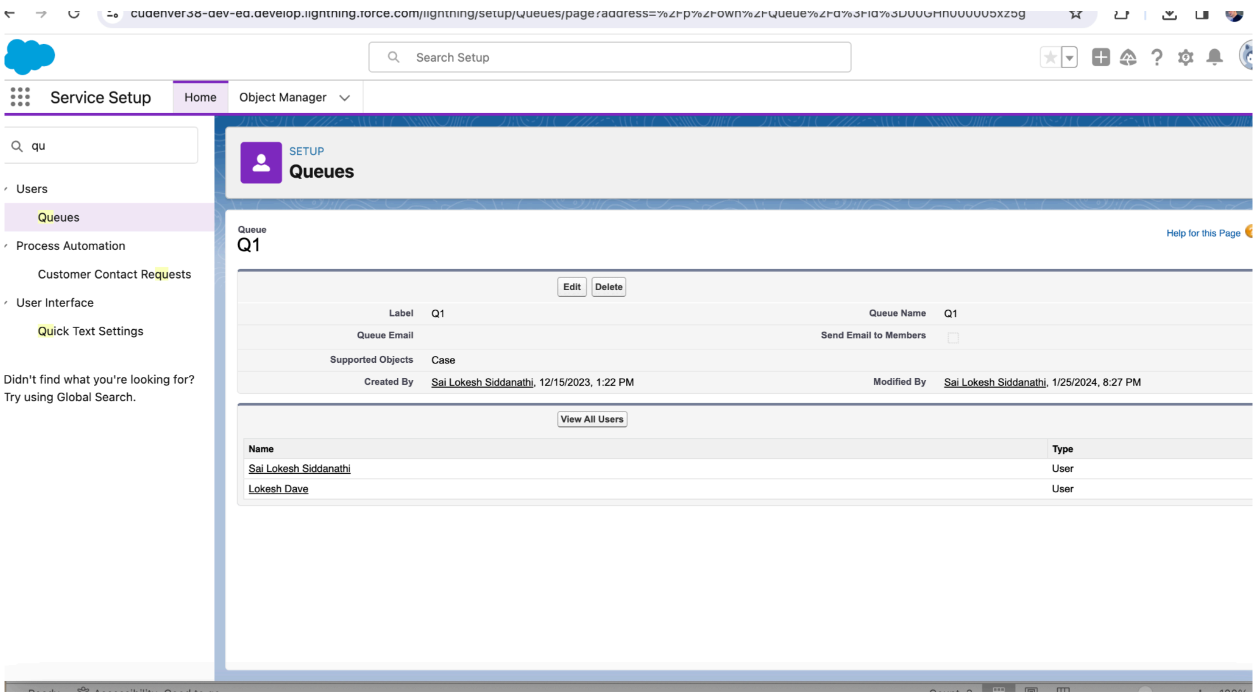
Through phone call if customer faces any issues then case is automatically created



Case Assignment rules:

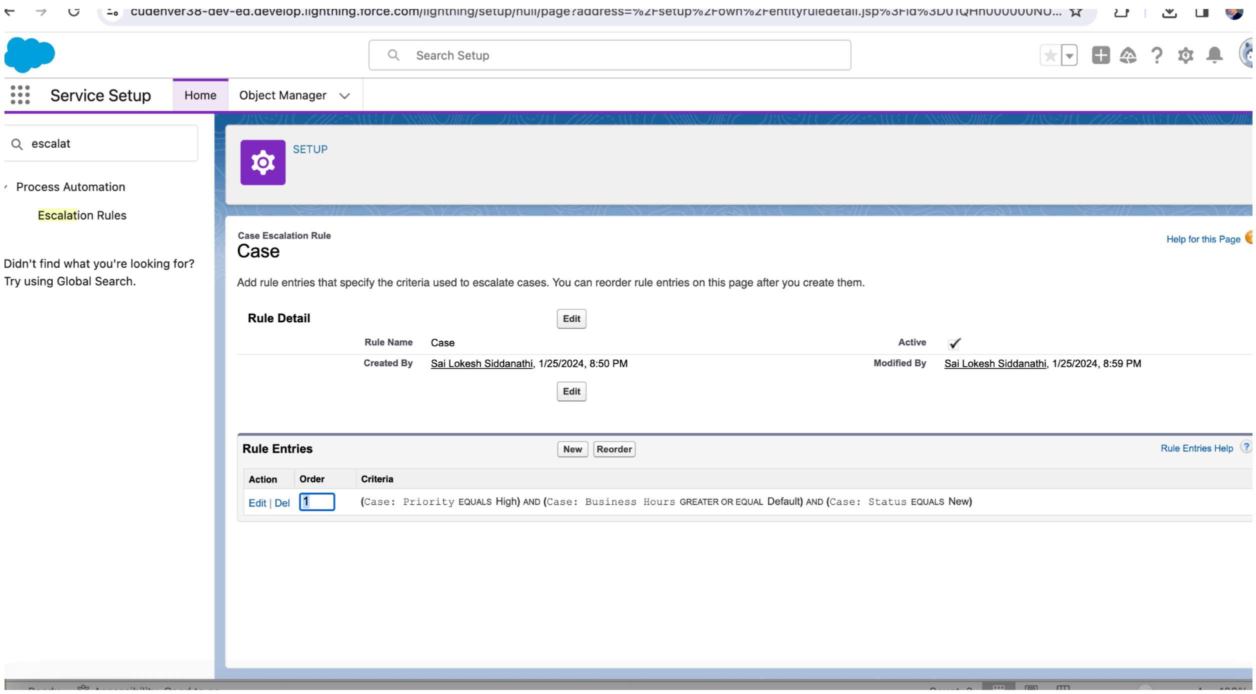
Queues:

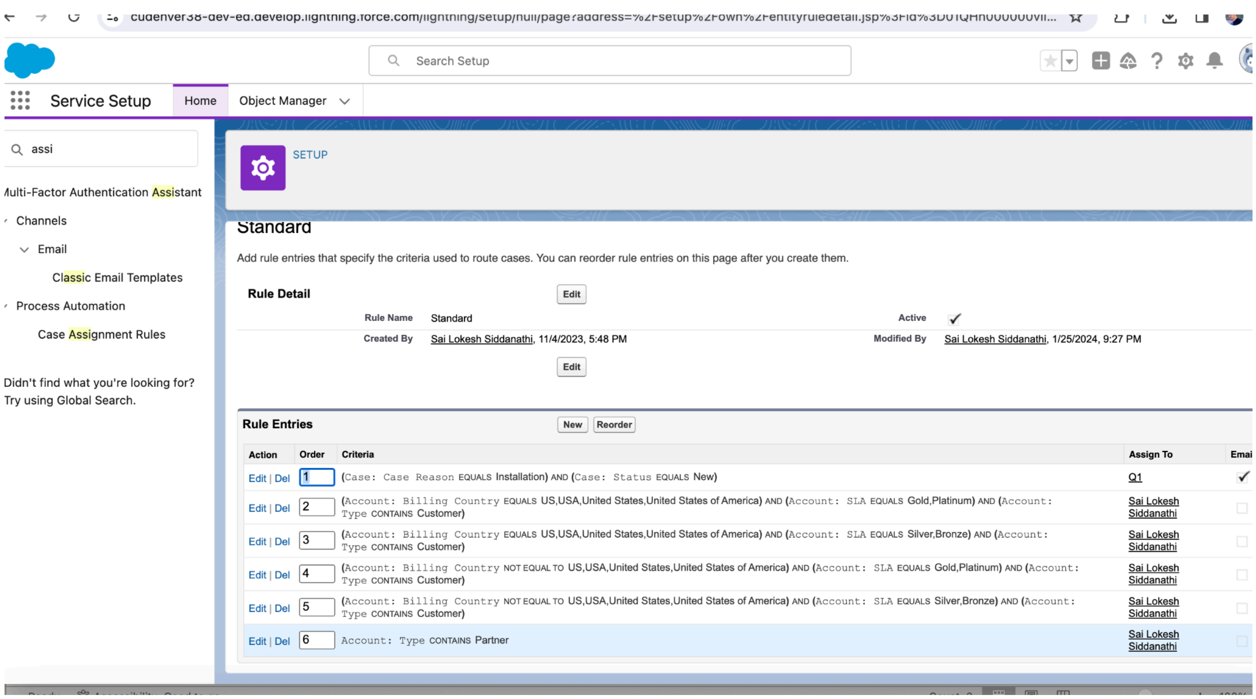
It is generally used to assign the ownership related to the case.



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





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.develop.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.develop.my.salesforce.com/500Hn00001br9JI

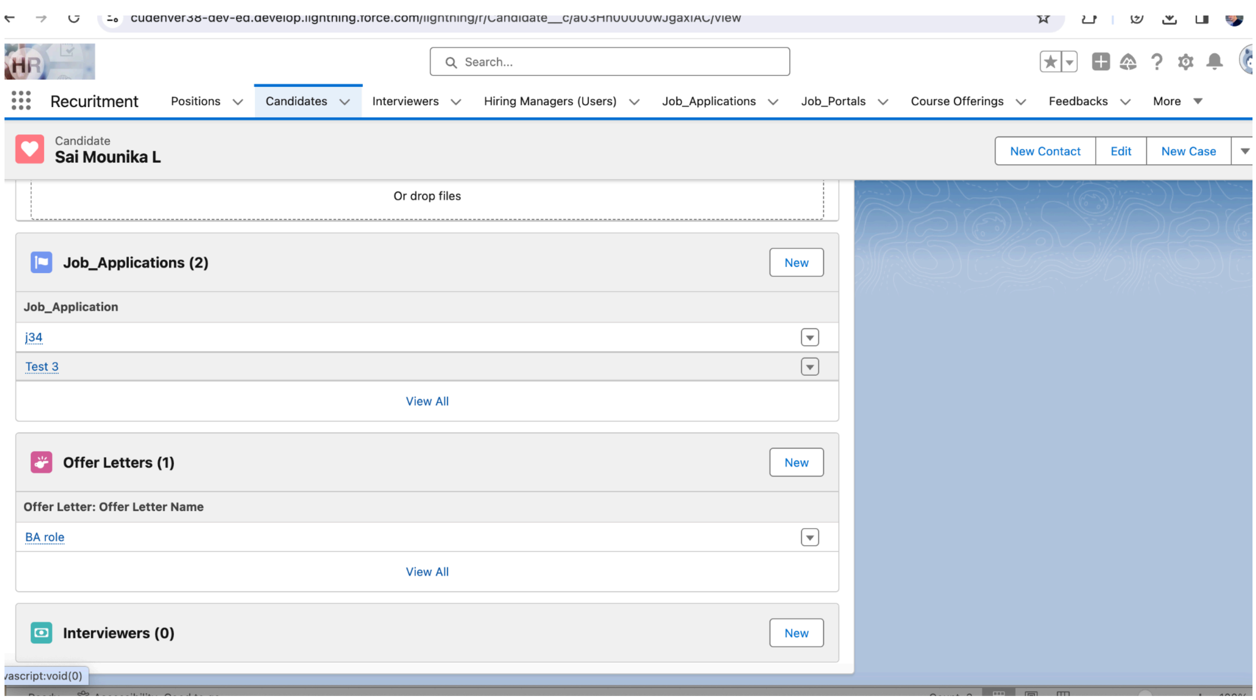
Project-2:

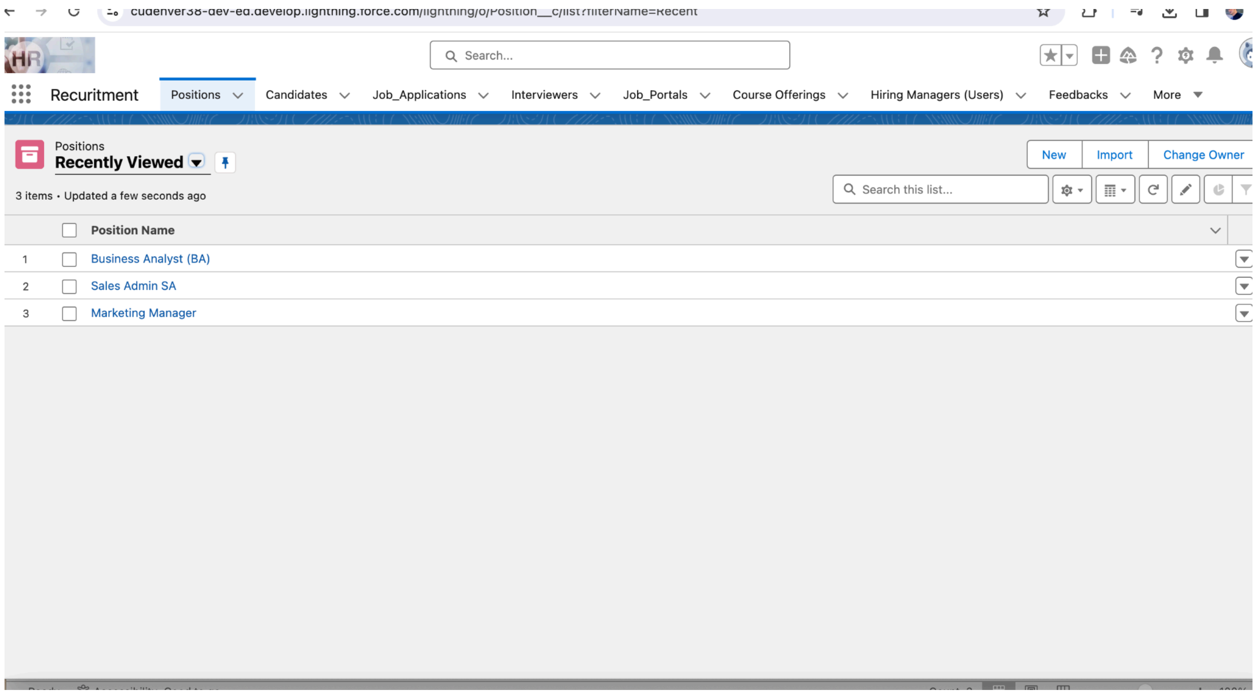
Goal : To launch an app that is very useful for the HR team of any organization to track all the job postings, candidates and recruiters.

Objects:

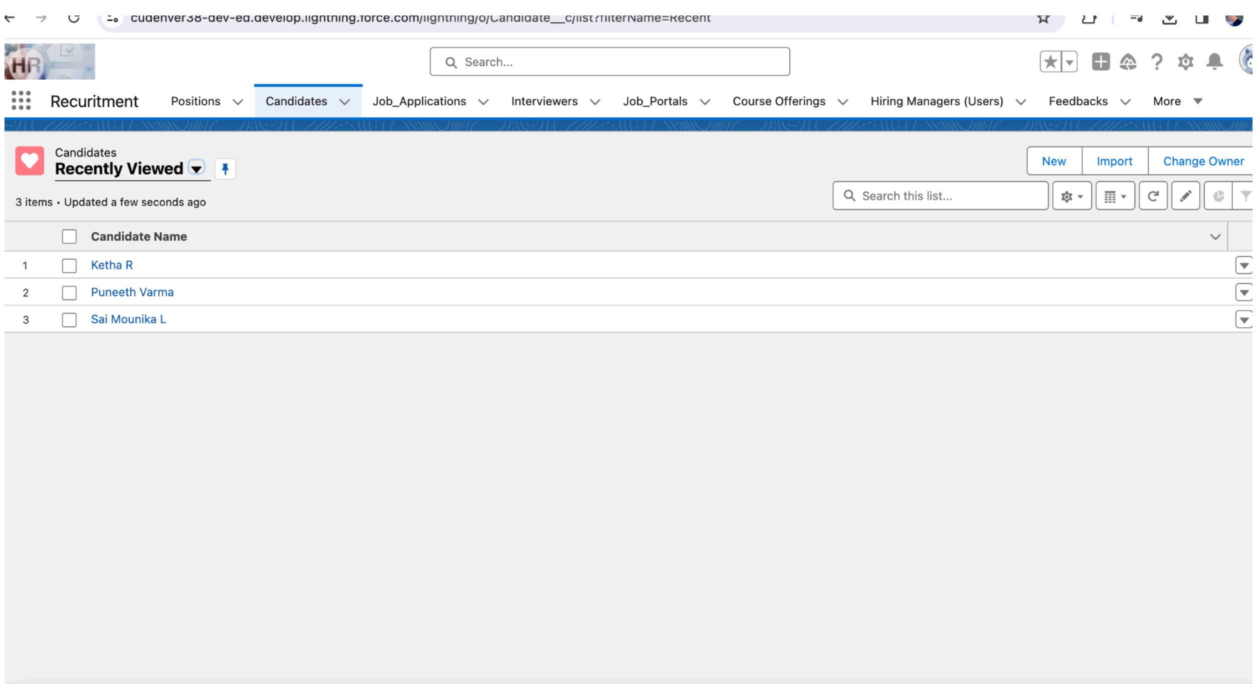
1) Job Postings
2) Candidates
3) Interviewers
4) Job Application
5) HR Manager
6) Work flows
7) Approval

Interviewer & Candidate - Look up
Job Application & Candidate - Look up
Job Application & Interviewer - Look up
Candidate & offer letter - Look up

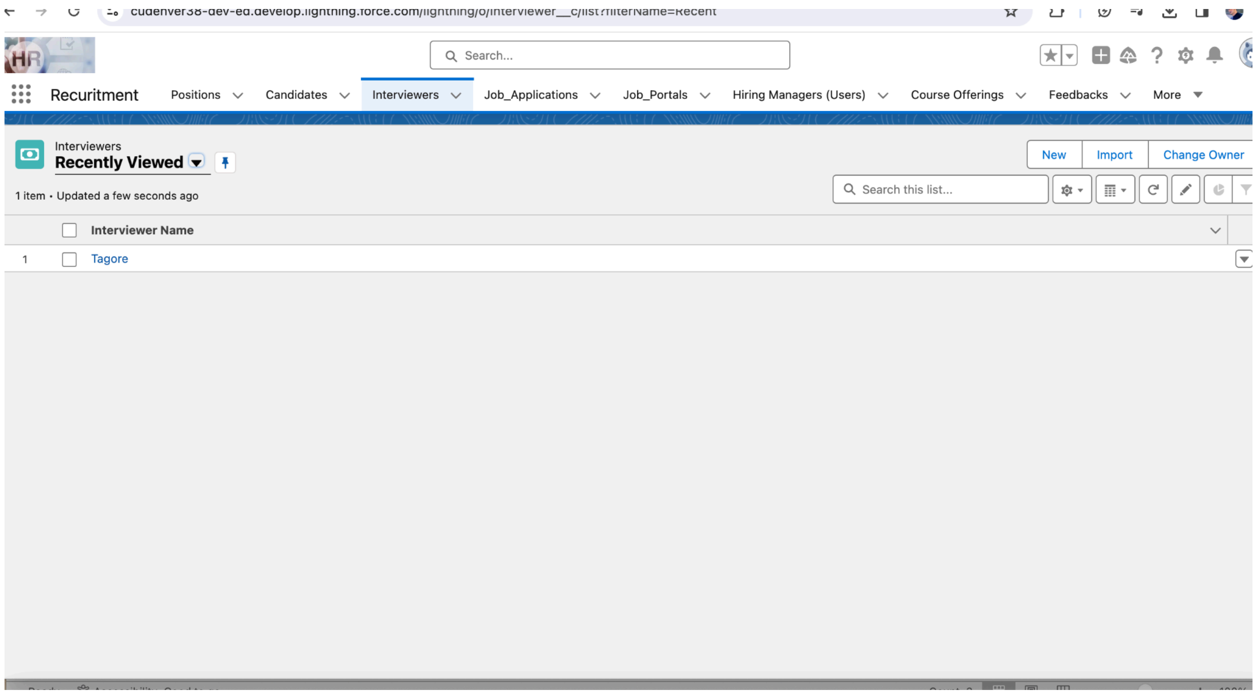




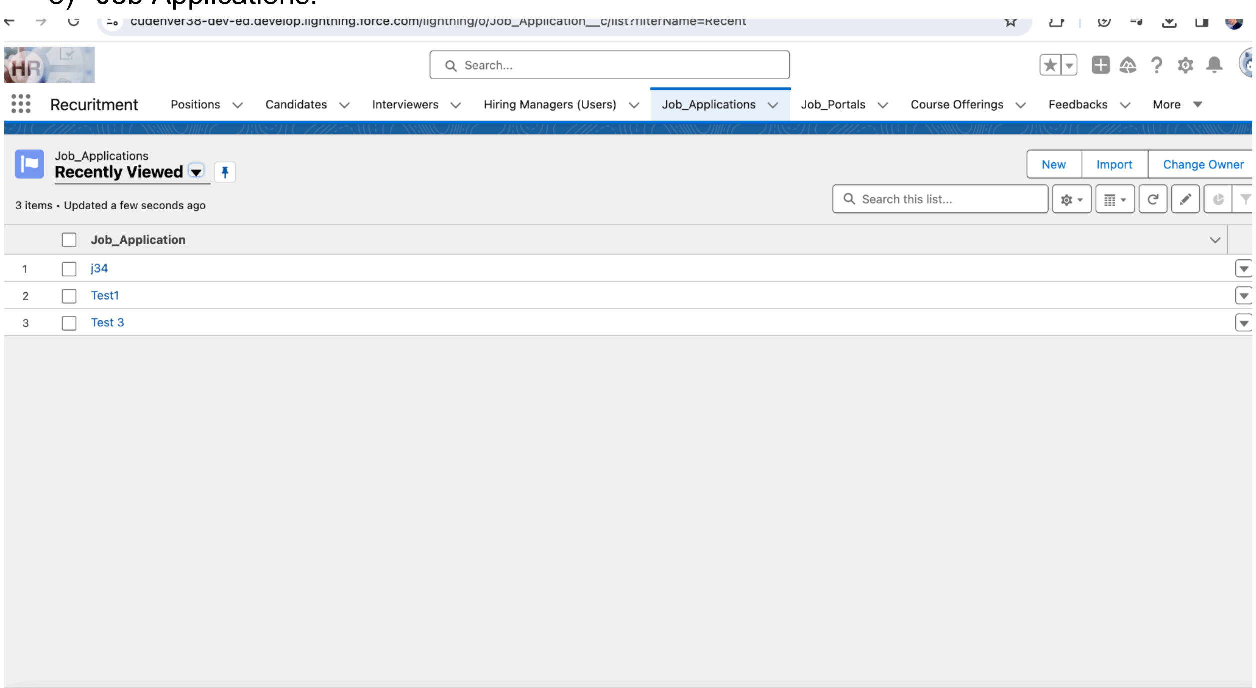
2) Candidates



3) Interviewers:

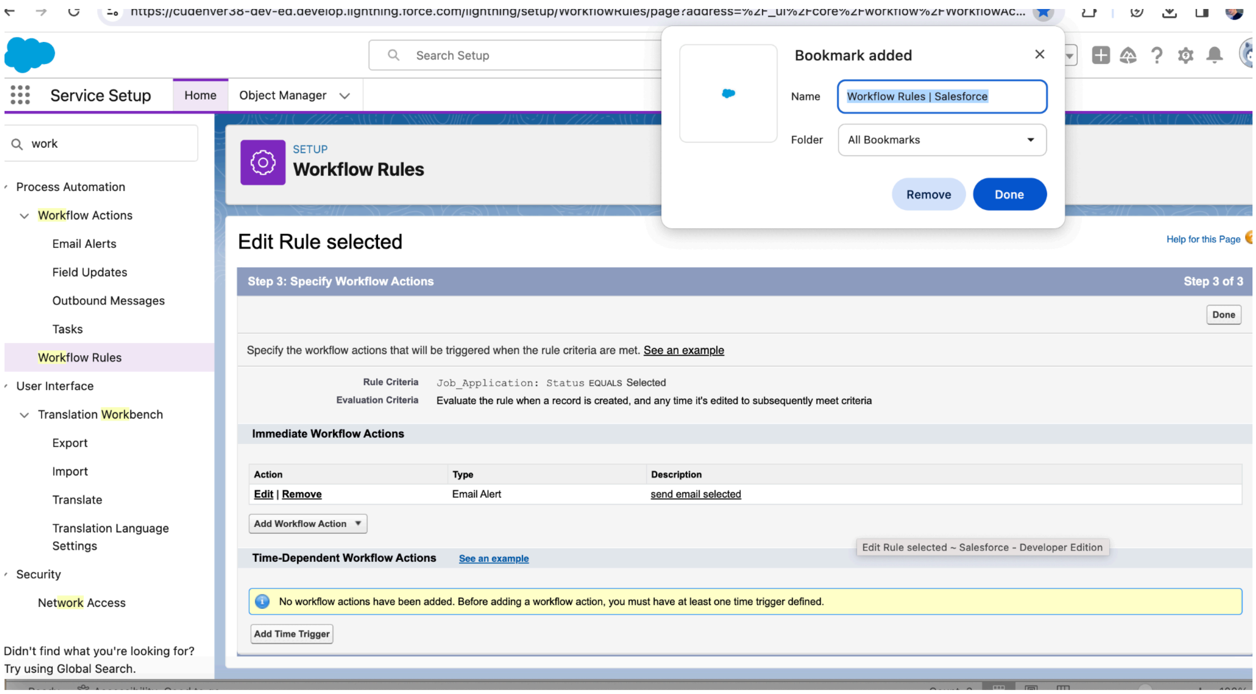


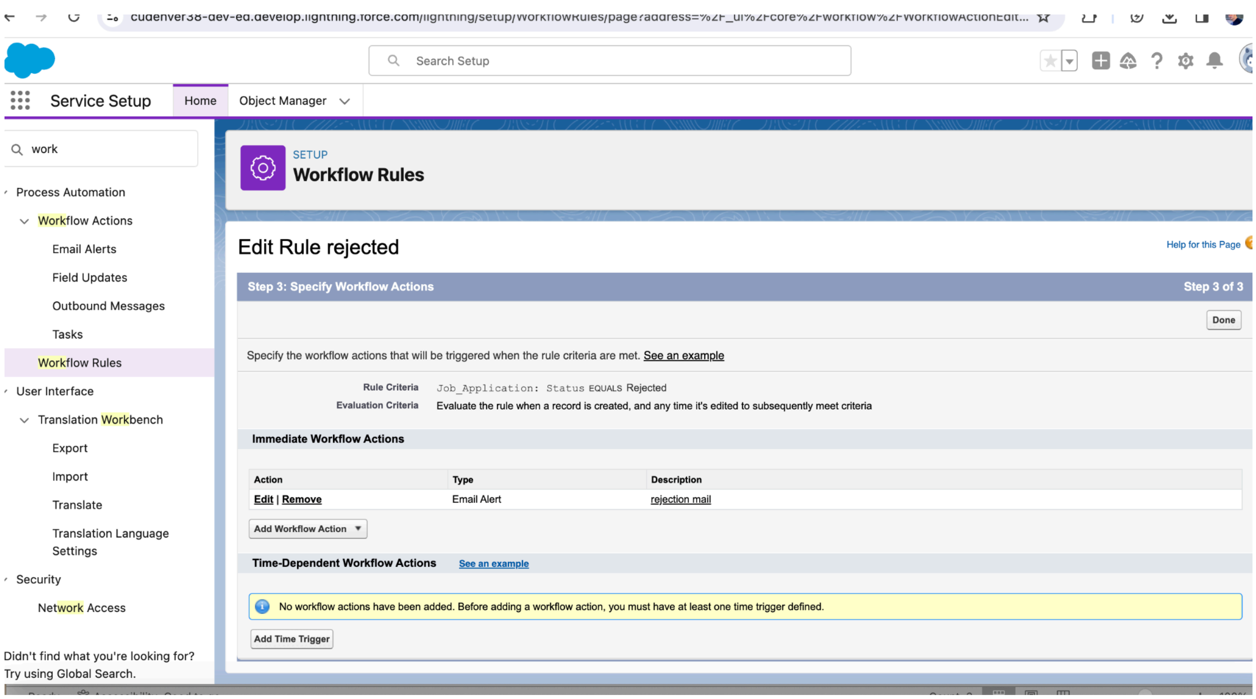
8) Job Applications:



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.


Search Setup
Bookmark added
Name
Workflow Rules | Salesforce
Folder
All Bookmarks
Remove
Done
Service Setup
Home
Object Manager
work
Process Automation
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Tasks
Workflow Rules
User Interface
Translation Workbench
Export
Import
Translate
Translation Language Settings
Security
Network Access
Didn't find what you're looking for? Try using Global Search.
SETUP
Workflow Rules
Edit Rule selected
Help for this Page
Step 3: Specify Workflow Actions
Step 3 of 3
Done
Specify the workflow actions that will be triggered when the rule criteria are met. See an example
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 See an example
Edit Rule selected ~ Salesforce - Developer Edition
No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.
Add Time Trigger


Search Setup
Service Setup
Home
Object Manager
work
Process Automation
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Tasks
Workflow Rules
User Interface
Translation Workbench
Export
Import
Translate
Translation Language Settings
Security
Network Access
Didn't find what you're looking for? Try using Global Search.
SETUP
Workflow Rules
Edit Rule rejected
Help for this Page
Step 3: Specify Workflow Actions
Step 3 of 3
Done
Specify the workflow actions that will be triggered when the rule criteria are met. See an example
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 See an example
No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.
Add Time Trigger