1.INTRODUCTION OF SALESFORCE

Salesforce is a cloud-based customer relationship management (CRM) platform that provides a comprehensive set of tools and functionalities to manage customer interactions, sales, marketing, service, and more. It offers a flexible and scalable solution for businesses of all sizes, allowing them to streamline their operations, automate processes, and drive growth.

Salesforce offers a robust and customizable platform that enables organizations to build and deploy custom applications and objects tailored to their specific needs. With its extensive ecosystem of products, features, and integrations, Salesforce empowers businesses to enhance productivity, improve customer satisfaction, and make data-driven decisions.

2.TITLE

Import Your Data Using NPSP Data Importer- Quickly process and connect donor records using Nonprofit Success Pack

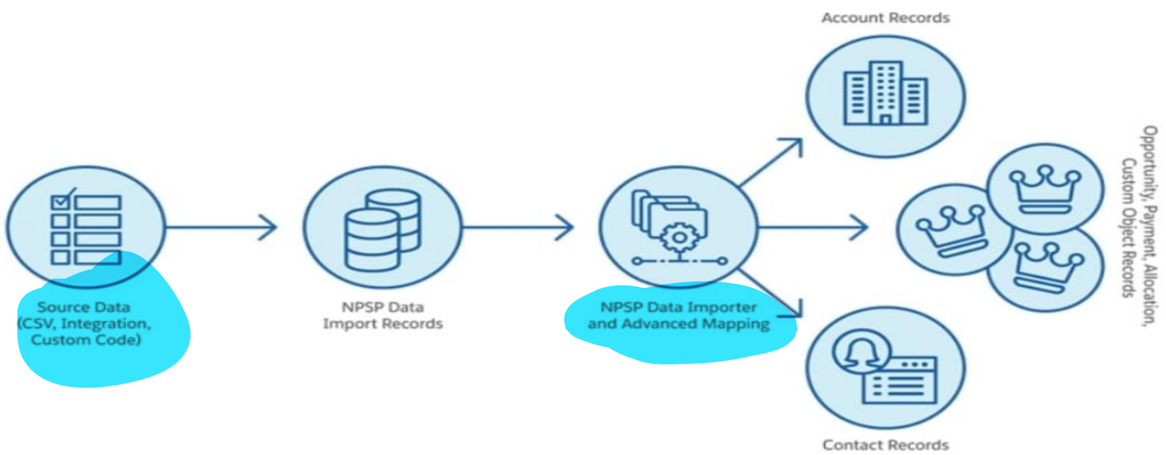
Topic:

The NPSP Data Importer is a tool that helps nonprofits import their data into the Nonprofit Success Pack (NPSP) quickly. It provides an easy-to-use interface and templates for organizing data in a CSV file. After installing and configuring the tool, you can define import settings, map data fields, validate the data, and import it into NPSP. The tool simplifies the process, allowing nonprofits to efficiently connect and manage donor records within NPSP.

2.1.OBJECTIVES

- Discover why you should install Nonprofit Success Pack (NPSP) into a Trailhead Playground
- Install NPSP into a Playground using the NPSP installer

2.2.DESIGN-SCHEMA DIAGRAM



2.3. IMPLEMENTATION-STEPS/PROCEDURE

- **Assess your data:**
  - Identify the types of data you want to import, such as contacts, donations, campaigns, etc.
  - Review and clean your data to ensure it is accurate and properly formatted.

- **Install NPSP Data Importer:**
  - Install the NPSP Data Importer package from the Salesforce AppExchange.
  - Follow the installation instructions to add the package to your Salesforce org.

- **Configure NPSP Data Importer:**
  - Grant the necessary permissions to users who will be using the NPSP Data Importer.
  - Configure user profiles and access levels to ensure proper tool usage.

- **Prepare your data**:
  - Organize your data in a CSV file, with each column representing a data field.
  - Make sure your CSV file matches the expected format and data structure for NPSP.

- **Define import settings**:
  - Specify import settings in the NPSP Data Importer tool.
  - Configure options like deduplication rules, error handling, default values, etc.

- **Map data fields:**
  - Use the visual mapping interface in the NPSP Data Importer to map CSV fields to NPSP fields.
  - Ensure that each CSV field corresponds correctly to the appropriate NPSP field.

- **Validate data:**
  - Validate your data before importing to identify any errors or inconsistencies.
  - Review validation errors and make necessary corrections in the CSV file.

- **Import data:**
  - Initiate the data import process using the NPSP Data Importer tool.
  - Monitor the progress and ensure a successful import of your data into NPSP.

- **Review and post-process imported data:**
  - Review the imported data within NPSP to verify accuracy and completeness.
  - Perform post-processing tasks such as associating contacts with campaigns or updating additional information.

- **Test and validate imported data:**
  - Test the functionality and accuracy of the imported data within NPSP.
  - Validate that the imported data aligns with your expectations and can be effectively used for donor management.

2.4.ADVANTAGES / DISADVANTAGES

ADVANTAGES

1. Time-saving: The tool automates and streamlines the data import process, saving significant time compared to manual data entry. It eliminates the need for manual data formatting, mapping, and validation, allowing nonprofits to import their data quickly and efficiently.

2. User-friendly interface: The NPSP Data Importer provides a user-friendly interface that simplifies the data import process. It offers pre-defined templates and visual mapping features, making it easy for users to understand and navigate the import process, even without extensive technical expertise.

3. Data accuracy: By using the NPSP Data Importer, nonprofits can ensure the accuracy and consistency of their imported data. The tool performs validation checks and error handling, allowing users to identify and correct any issues before completing the import. This helps maintain data integrity within NPSP.

4. Enhanced data management: With the NPSP Data Importer, nonprofits can effectively manage and organize their donor records within NPSP. It enables them to import various types of data, such as contact information, donation history, and campaign participation, allowing for a comprehensive view of donor relationships and fundraising activities.

5. Seamless integration with NPSP: The NPSP Data Importer is specifically designed for use with the Nonprofit Success Pack, ensuring seamless integration and compatibility. It leverages the features and functionality of NPSP, enabling nonprofits to leverage the full capabilities of the app while importing their data.

6. Scalability and flexibility: The NPSP Data Importer is suitable for organizations of all sizes, whether they are importing a small batch of records or large-scale data migration. It offers flexibility in defining import settings and field mappings, allowing nonprofits to adapt the import process to their specific needs and requirements.

DISADVANTAGES

1. Learning curve: Despite its user-friendly interface, there may still be a learning curve for users who are unfamiliar with the NPSP Data Importer or Salesforce in general. Nonprofits may need to allocate time and resources for training their staff on how to effectively use the tool.

2. Data complexity: If the data being imported is complex or has unique requirements, it may require additional customization or manual intervention beyond what the NPSP Data Importer can handle. In such cases, nonprofits might need to resort to alternative methods or custom development to ensure a successful data import.

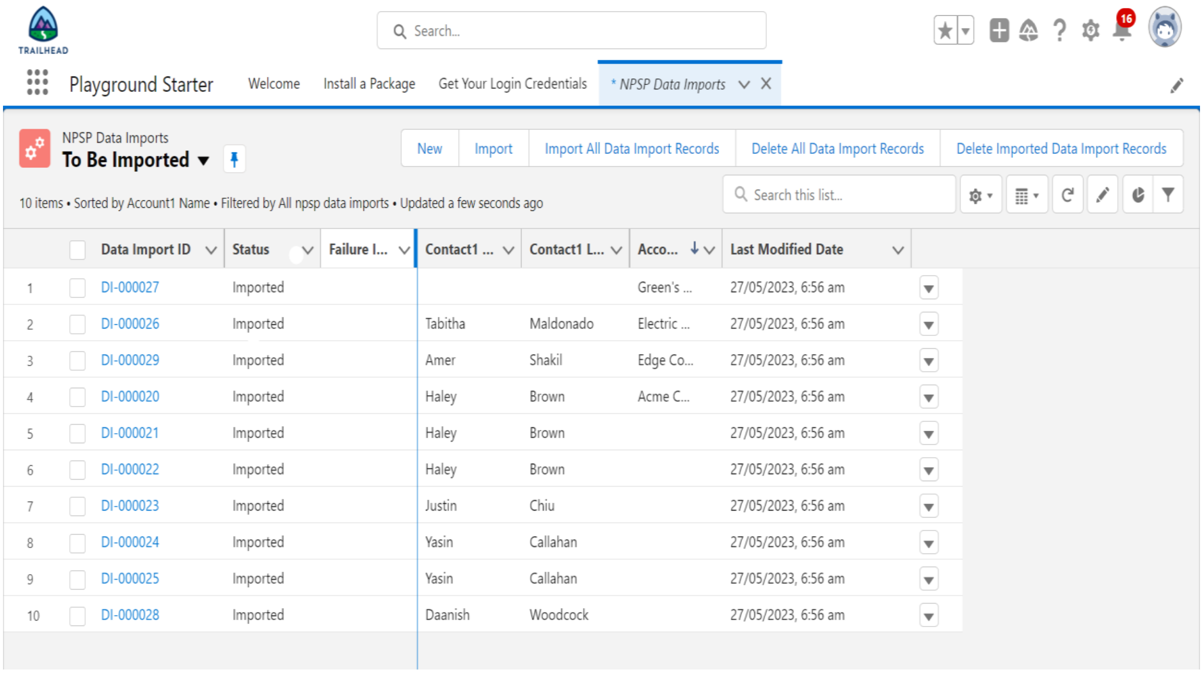
3. Data quality issues: While the NPSP Data Importer includes data validation features, it may not catch all potential data quality issues or inconsistencies. Nonprofits need to ensure that their source data is clean and properly formatted to avoid data import errors or inaccuracies.

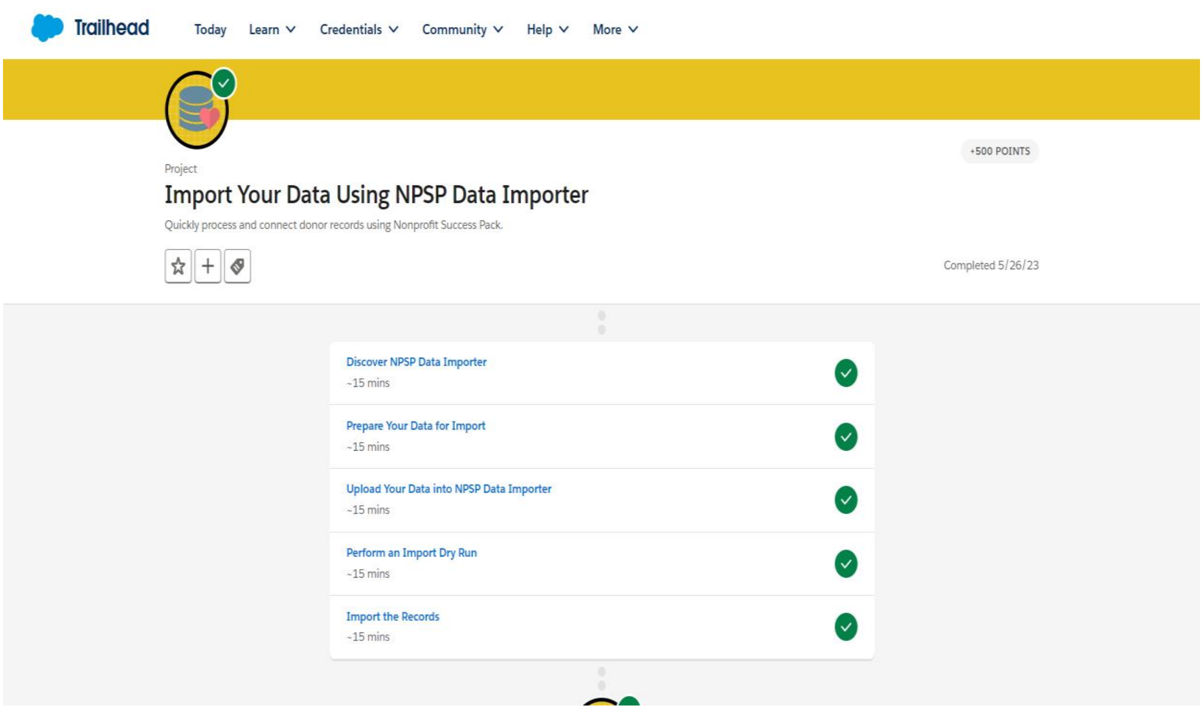
4. Limited customization options: The NPSP Data Importer provides pre-defined templates and mappings, which may not fully align with the specific needs of every nonprofit. Customizing the import process or mapping fields beyond the tool's capabilities might require additional development or customization efforts.

5. Dependency on NPSP: The NPSP Data Importer is specifically built for use with the Nonprofit Success Pack. If a nonprofit decides to transition to a different CRM system or modify their data management processes, they may need to explore alternative data import tools or methods that are compatible with their new system.

6. Initial setup and configuration: While the NPSP Data Importer simplifies the data import process once it is installed and configured, the initial setup and configuration can require some effort. Nonprofits need to ensure proper installation, grant necessary permissions, and map data fields accurately to establish a smooth import workflow.

2.5 RESULT- SCREENSHOTS OF THE USER INTERFACE





3 TITLE

Build a Suggestion Box object- Using a simple suggestion management input data gets segregated to specific criteria of the suggestion.

Topic:

Build a Suggestion Box object - Using a simple suggestion management input data gets segregated to specific criteria of the suggestion.

By implementing a suggestion box object in Salesforce, organizations can leverage the platform's capabilities to streamline the suggestion management process. Users can easily submit their suggestions, and the system will automatically categorize and segregate the data based on predefined criteria.

This segregation of data allows for efficient analysis and evaluation of the suggestions. It enables organizations to identify patterns, prioritize suggestions based on their relevance or impact, and assign them to the appropriate teams or individuals for further review and action.

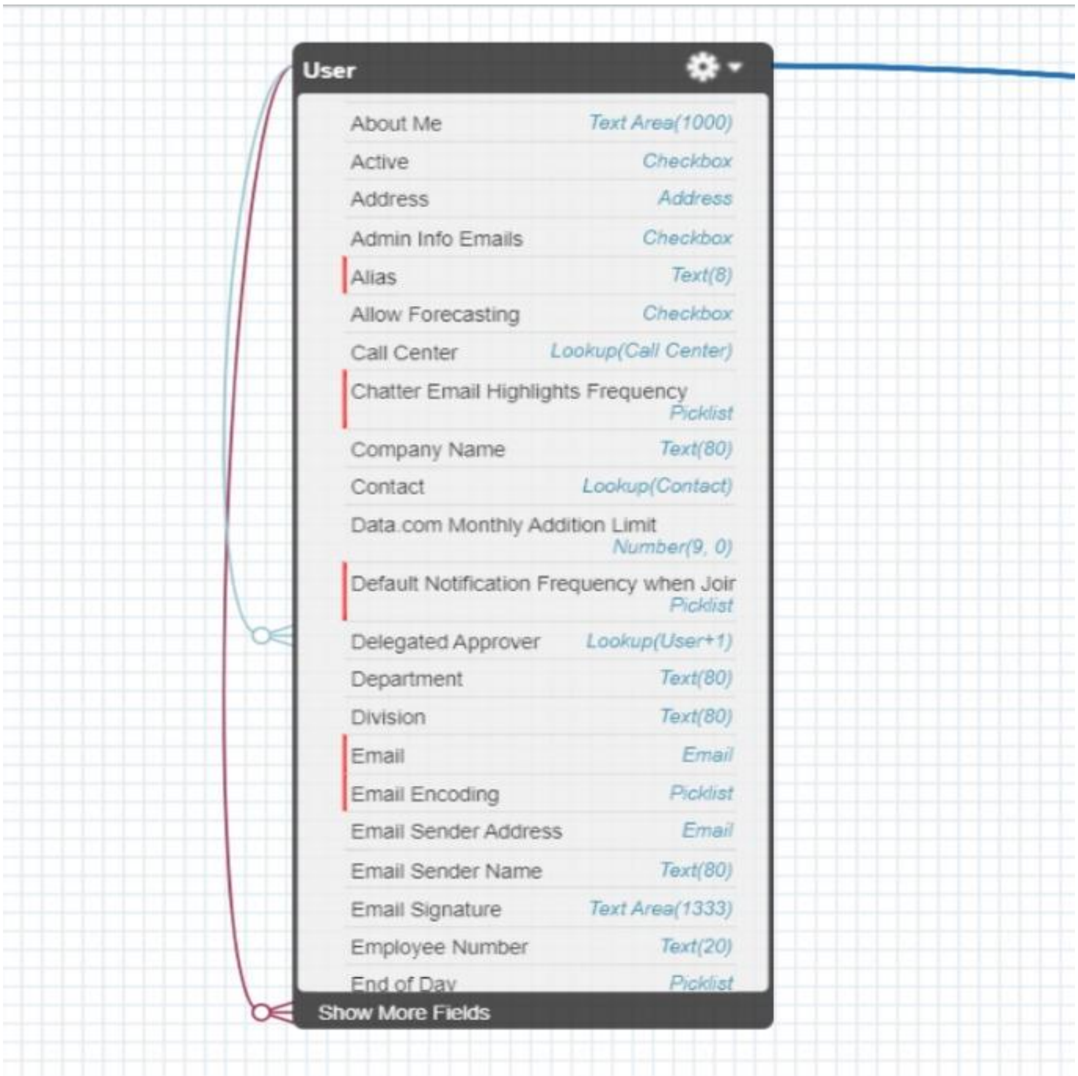
With Salesforce's customizable features and reporting capabilities, businesses can generate meaningful insights from the suggestion data, visualize trends, and track the progress of each suggestion. The integration of the suggestion box with other Salesforce tools and systems enables seamless collaboration and ensures that suggestions are addressed promptly and effectively.

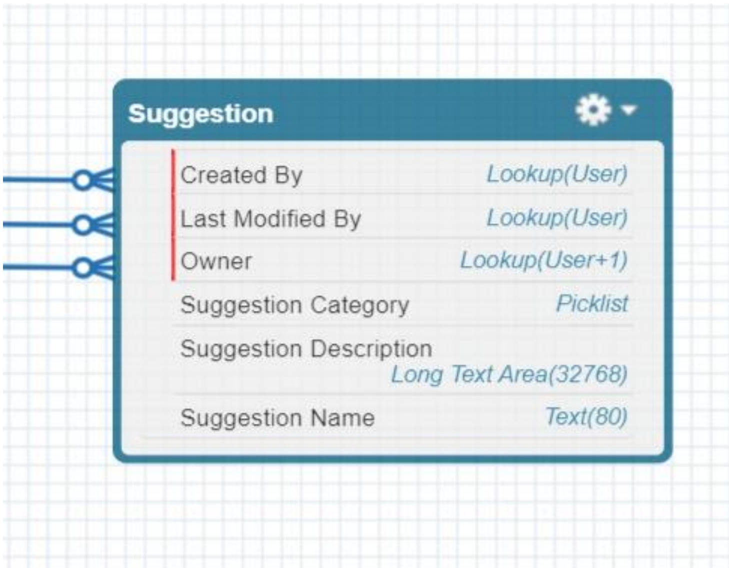
Overall, building a suggestion box object within Salesforce provides a structured and efficient approach to gathering and managing suggestions. It promotes transparency, encourages user engagement, and enhances the decision-making process by leveraging the power of the Salesforce platform.

3.1 OBJECTIVES

- Create a Salesforce app that includes standard collaboration and analytics features.
- Familiarize yourself with the app’s user interface

3.2 DESIGN-SCHEMA DIAGRAM





3.3 IMPLEMENTATION-STEPS/PROCEDURE

3.3.1 Create a Suggestion Box App

You build a suggestion management app that allows employees to submit suggestions and track their status using these steps.

1. Create the app definition and a data model for the application. This simple application requires only one custom object.
2. Modify the user interface on the browser and on the Salesforce mobile app using page layouts, compact layouts, and global actions.
3. Automate calculations, data quality, and database updates to improve the user experience using formulas, validation rules, and flow builder.
4. Define reports, charts, and dashboards to track the status of suggestions and analyze how well the company manages suggestions.

Create an App and a Custom Object

1. In your Trailhead Playground, click the **gear icon** and select **Setup**.
2. Click the **Object Manager** tab.
3. Click **Create** and select **Custom Object**.
4. On the New Custom Object page, create the object as follows:
    - Label: Suggestion
    - Plural Label: Suggestions
    - Record Name: Suggestion Name
    - Data Type: **Text**
    - Allow Reports: Selected.
    - Click **Save**.
5. To create a custom tab, click the **Home** tab, enter Tabs in Quick Find and select **Tabs**.
6. Under **Custom Object Tabs**, click **New**.
7. For **Object**, select **Suggestion**.
8. For **Tab Style**, select any icon.
9. Leave all defaults as is. Click **Next**, **Next**, and **Save**.
10. From Setup, in the Quick Find box, enter App Manager and select **App Manager**.
11. Click **New Lightning App**, enter Suggestion Box for App Name, and click **Next**.
12. Leave all defaults selected, then click **Next**.
13. Click **Next**.
14. From **Available Items**, select **Suggestions, Reports**, and **Dashboards** and move them to **Selected Items**. Click **Next**.
15. From **Available Profiles**, select **System Administrator** and move it to **Selected Profiles**. Click **Save & Finish**.
16. To verify your changes, click the **app launcher** and search for and select **Suggestion Box**.

3.3.2 Add Custom Fields

1. Click the **gear icon** and select **Setup**. This launches Setup in a new tab.
2. Click the **Object Manager** tab.
3. From the list of objects in the dropdown, click **Suggestion**.
4. Click the **Fields & Relationships** section.
5. Click **New**.

Add a Description Field

This field is used by employees when they explain their suggestion.

1. For Data Type, select **Text Area (Long)**, and click **Next**.
2. Fill in the custom field details:
   - Field Label: Suggestion Description
   - Length: 32,768
   - Visible Lines: 10
   - Field Name: Suggestion_Description
   - Help Text: Please enter as much detail around this suggestion so we clearly understand your idea.
3. Click **Next**.
4. Click **Next** again.
5. Click **Save & New**.

Add a Category Field

This field helps us categorize each suggestion. It also makes it easier for us to report on what types of suggestions we get the most.

1. For Data Type, select **Picklist**, and click **Next**.
2. Fill in the custom field details:
   - Field Label: Suggestion Category
   - Field Name: Suggestion_Category
   - Select the radio button **Enter values, with each value separated by a new line**.
   - Enter the following values for the picklist (one per line):
   - Customer Service
   - Employee Services
   - Facilities/ IT
   - Kitchen Snacks
   - Other
3. Deselect **Restrict picklist to the values defined in the value set**.
4. Click **Next**.
5. Click **Next** again.
6. Click **Save**.

Try Out the App

Click the **app launcher** and select **Suggestion Box**. Click the **Suggestions** tab, and click **New**. You should see that your two custom fields were added to the Suggestion page. Fill in a sample suggestion and click **Save**.

Viewing Objects in Schema Builder

1. Click and select **Setup**. This launches Setup in a new tab. From Setup, enter Schema Builder in Quick Find, then select **Schema Builder**.
2. From the Objects Palette, click **Clear All** and then select the **Suggestion** object and the **User** object.
3. If you don't see your objects in the Canvas area, click **Auto-Layout** and drag them around until you like how they are arranged.

Add a Status Field

This field will have unique security protocols in that only admins can change the status.

1. Click the **Elements** tab. This displays all of the new things you can add to your database schema: objects and fields.
2. Drag the **Picklist** field type and drop it on the Suggestions object.
3. Fill in the custom field details:
   - **a** Field Label: Status
   - **b** Field Name: Status
   - **c** Values: (one per line)
     - New
     - Under Consideration
     - In Progress
     - Implemented
4. Select **Use first value as default value**.
5. Click **Save**.

Next, you update the Status field's security.

- While still in the Schema Builder, right-click the **Status** field that you just added to the Suggestion object. Click **Manage Field Permissions**.
- Select **Read-Only** checkbox at the top of the column to make this field read only for all users.
- In the Read-Only column, deselect **System Administrator** then click **Save**.

Add a Date Field

1. Drag the **Date** field type and drop it on the Suggestions object.
2. Fill in the custom field details:
   - Field Label: Implemented Date
   - Field Name: Implemented_Date
   - Leave the defaults for the remaining fields.
   - Click **Save**. You should see the Implemented Date field at the top of the list of fields in the Suggestion object's box in the schema diagram.

Next, you update the Implemented Date field's security.

1. While still in the Schema Builder, right-click the **Implemented Date** field that you just added to the Suggestion object. Click **Manage Field Permissions**.
2. At the top of the column, select **Read-Only** to make this field read only for all users.
3. In the Read-Only column, deselect **System Administrator**, then click **Save**.

3.3.3 Modify the User Experience

Modify the Page Layout

1. Click the **gear icon**  and select **Setup**. This launches Setup in a new tab.
2. Click the **Object Manager** tab.
3. From the list of objects, click **Suggestion**.
4. Select **Page Layouts**, click the arrow dropdown for Suggestion Layout, and select **Edit**.

5. Scroll to Suggestion Detail.

Now add new fields to the Information section.

1. Click the **Status** field and drag it to the Information section, under Owner.
2. Click the **Implemented Date** field and drag it to under Status.
3. Click **Quick Save**.

Now add a new Description section and rearrange the remaining fields.

1. In the palette, click **Section** and drag it down until a green bar appears above the System Information section. Drop it there to create the section.
2. In the Section Properties box, enter Description for the section name.
3. Choose **1-column** for the layout.
4. Click **OK**.
5. Drag the **Suggestion Description** field into your new section. Your page should look like this when finished.
6. Click **Save**.

Add a Global Action

- Navigate to the Suggestion object
- Click **New**
- Fill in the suggestion information
- Save
- Navigate back to the contact record
- Try to remember what they were doing!

You want to make it easier for employees by reducing the number of clicks and keeping them in context. You can do this with a Global Action.

1. Click the **gear icon** and select **Setup**. From Setup, enter Global Actions in Quick Find, then select **Global Actions**.
2. Click **New Action**.
3. Enter the action details.
   - Action Type: **Create a Record**
   - Target Object: **Suggestion**
   - Standard Label Type: **New [Record]**
   - Name: New_Suggestion
4. Click **Save**. This takes you to the Global Action layout so that you can select the fields to display when the action is selected.
5. Drag **Suggestion Category** and **Suggestion Description** onto the New Suggestion layout so that employees can enter those values when creating a suggestion.
6. Click **Save**.
7. In the Predefined Field Values section, click **New**.
8. Enter the predefined field value details.
9. Field Name: **Status**
10. A specific value: **New**
11. Click **Save**.

You created a new action, but users can't see it yet. Fix that next.

1. From Setup, enter Publisher Layouts in Quick Find, then select **Publisher Layouts**.
2. Locate the Global Layout and click **Edit.**
3. Under the Salesforce Mobile and Lightning Experience Actions section, click **override the predefined actions.**
4. On the left side of the palette at the top of the page, select **Mobile & Lightning Actions**, then select the **New Suggestion** action and drag it into the Quick Actions in the Salesforce Mobile and Lightning Experience Actions section after Post.
5. Click **Save**.

3.3.4 Add Business Logic

Add a Formula Field

1. Click the **gear icon** and select **Setup**.
2. Click the **Object Manager** tab.
3. From the list of objects, select **Suggestion**.
4. Select the **Fields & Relationships** from the left navigation, then click **New**.
5. For the data type, select **Formula** and click **Next**.
6. Enter the field details.
   - Field Label: Number of Days Open
   - Field Name: Number_Of_Days_Open
   - Formula Return Type: **Number**
   - Decimal Places: 0
7. Click **Next**.
8. Click the **Advanced Formula** tab.
9. In the Formula Editor, enter the formula: IF(ISBLANK(Implemented_Date__c), TODAY() - DATEVALUE(CreatedDate), Implemented_Date__c - DATEVALUE(CreatedDate))
10. To ensure there are no errors, Click **Check Syntax**.
11. Click **Next** and **Next** again.
12. Click **Save**.

Add a Validation Rule

1. From the list of objects in Object Manager, select **Suggestion**.
2. Select **Validation Rules**, then click **New**.
3. Enter the rule details.
   - Rule Name: Date_in_Range
   - Error Condition Formula: Implemented_Date__c>TODAY()
   - Error Message: The implementation date must be today or in the past, not in the future.
   - Error Location: **Field: Implemented Date**
4. Click **Save**.

Add a Field Update Using Flow Builder

1. From Setup, click the **Home** tab.
2. Enter flow in Quick Find, then select **Flows**.
3. Click **New Flow**.
4. Select **Record-Triggered Flow** and click **Create**.
5. For Object, enter Suggestion and select **Suggestion**.
6. Select **A record is created or updated**.
7. Select **All Conditions Are Met (AND)** from the Condition Requirements dropdown.
8. In the Field lookup, add Implemented_Date__c.
9. Ensure Operator lists **Is Null**.
10. In the Value lookup, enter value: False
11. Select **Only when a record is updated to meet the condition requirements** in the When to Run the Flow for Updated Records section.
12. Ensure **Fast Field Updates** is selected.

13. Click **Done**.

Add an Action and Activate the Flow

Now add the update triggering record action when the conditions are met.

1. On the flow canvas, on the path after the Start element, hover over and click .
2. Select **Update Triggering Record**.
3. Label the new decision element as Update Status to Implemented.
4. In the How to Find Records to Update and Set Their Values, ensure **Use the suggestion record that triggered the flow** is selected.
5. For Set Filter Conditions, ensure **None-Always Update Record** is selected.
6. In the Set Field Values for the Suggestion Record field, add Status__c.
7. Add Implemented to the Value field.
8. Click **Done**.
9. Click **Save** in the upper right.
10. Label your new Flow as Update Status.
11. Ensure API Name is Update_Status.
12. Click **Save**.
13. Click **Activate**.
14. Click the **back arrow button** in the upper left to leave Flow Builder.

3.3.5 Create Reports and Dashboards

Create a Tabular Report

1. Click the **app launcher** and select **Suggestion Box**. Select the **Reports** tab, click **New Report**.
2. In the Search Report Types, enter Suggestions and choose **Suggestions**. (If you don't see the Suggestions report type, go back to Setup and click **Object Manager**. Click the arrow next to Suggestion and then click **Edit**. Under Optional Features, check **Allow Reports**. Click **Save**. Then go back and create the report.)
3. Click **Start Report**.
4. In the Report Builder, notice that the Suggestion Name field is already on the report. In the preview screen, you can see the sample Suggestion records you created in previous steps.
5. Enter Status in the Add Columns search and select **Status**. Similarly, enter Number of Days Open in the Columns search and select **Number of Days Open**. Note: You can also drag the fields from the Fields pane into the Columns section.
6. To make sure that you're viewing only suggestions that still need to be implemented, select **Filters**. In Add filter search, enter Status and select **Status**. In the Filter by Status, change operator to **not equal to** and change Value(s) to **Implemented**. Click **Apply**.
7. Click **Save**, and name your report Suggestions: Status of Open Suggestions.
8. For Folder, click **Select Folder** and select **Public Reports** so that everyone can access it. Then click **Select Folder** again. (If you don't want this report to be accessible to everyone, create a folder and give different people different levels of access to it.)
9. Click **Save** and then **Save & Run**.

Create a Summary Report and a Report Chart

1. From the Report Results view of the **Suggestions: Status of Open Suggestions** report, click the dropdown by **Edit** and choose **Save As**.
2. Type Suggestions: By Status as the report name.
3. Select Public Reports folder.
4. Click **Save**.
5. Click the **Edit** button, then In the Groups search, enter Status and select **Status**.
6. Click **Save** and then **Save & Run** which leads to the Report Results view; click the **Add Chart button** to Add chart to this report.
7. Click the c**hart properties gear icon** and choose **Donut chart**.
8. In the **Chart Title** type Suggestions Status and in **Value** dropdown, choose **Record Count**.
9. Click the dropdown by the Edit button and then click **Save**.

Create a Dashboard

1. Go to the **Dashboards** tab and click **New Dashboard**.
2. Type the Dashboard Name as Suggestions Dashboard and create it on the default Private Dashboards folder.
3. Click **Create**.
4. Click the **+Component** button to add a component.
5. In the Report Search, look for Suggestions: By Status and select it. Click **Select**.
6. Choose the donut chart and in the Value dropdown select **Record Count**. Edit the Title as Suggestions By Status.
7. Click **Add**.
8. Click **Done** and then **Save**.

3.4 ADVANTAGES / DISADVANTAGES

Advantages:

1. Enhanced User Engagement: By providing a suggestion box, you empower users to actively participate and contribute to the improvement of processes, products, or services. This fosters a sense of involvement and engagement among users.

2. Efficient Data Segregation: Using specific criteria to segregate suggestions allows for easier organization and analysis. It enables quick identification of patterns, trends, or common issues, which can help prioritize and address the most impactful suggestions.

3. Streamlined Review and Action: The segregation of suggestions based on specific criteria enables more efficient review and action. It helps assign relevant suggestions to the appropriate teams or individuals for evaluation, implementation, or further investigation.

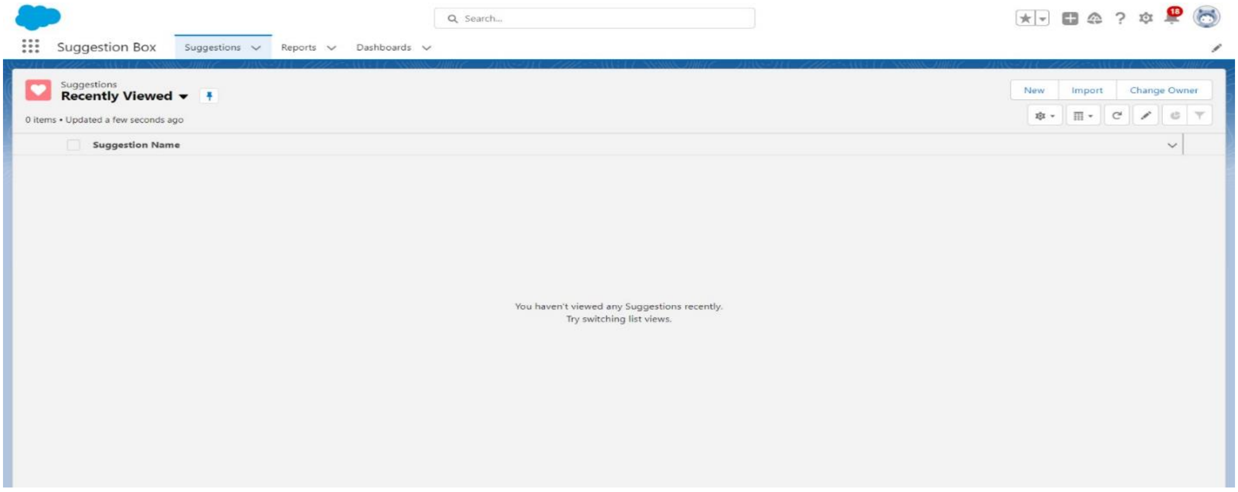
4. Data-Driven Decision Making: A well-implemented suggestion box object provides valuable insights and feedback from users. Analyzing the segregated data helps in making informed decisions and identifying areas for improvement based on user input.

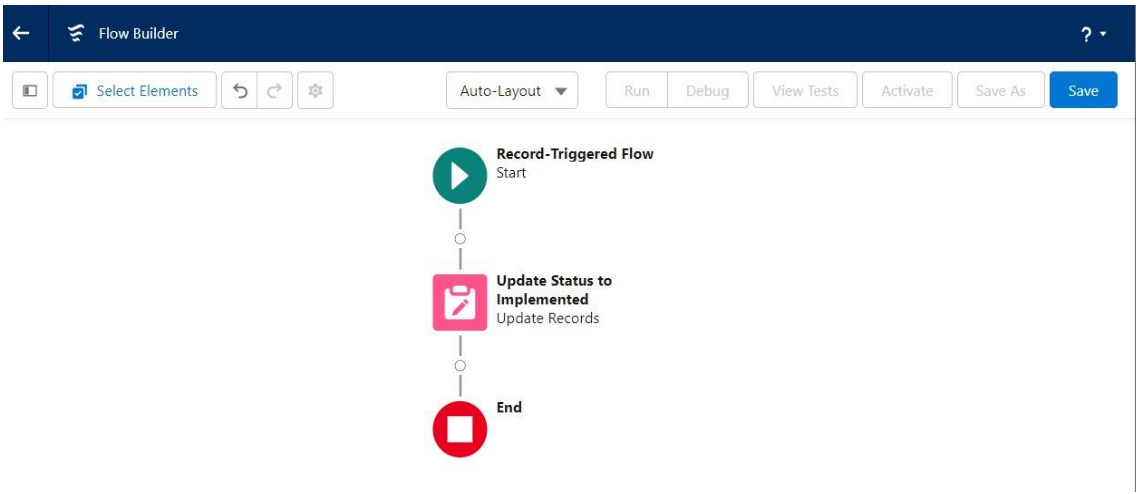
5. Continuous Improvement: The suggestion box object allows for an iterative approach to improve processes, products, or services. By regularly collecting suggestions, implementing changes, and communicating updates, organizations can demonstrate a commitment to continuous improvement.

Disadvantages

1. Subjectivity: The categorization of suggestions can be subjective, especially if it's done manually by a moderator. Different moderators may interpret suggestions differently, leading to inconsistent categorization.
2. Limited Context: A simple suggestion box may not capture the full context of a suggestion. Users may not provide sufficient details or background information, making it challenging to fully understand and evaluate the suggestion.
3. Lack of Interactivity: A basic suggestion box may not allow for interactive discussions or follow-up questions with the users. This limits the ability to gather additional information or clarify certain aspects of the suggestion.
4. Overwhelming Volume: In cases where the suggestion box receives a large volume of suggestions, managing and categorizing them manually can become overwhelming and time-consuming.
5. Implementation Challenges: Building an effective suggestion box system requires careful planning, development, and maintenance. It may involve integrating with existing systems, ensuring data security, and handling user privacy concerns.

3.5 RESULT- SCREENSHOTS OF THE USER INTERFACE





4 CONCLUSION

Building a suggestion box object with segregated data based on specific criteria offers benefits such as user engagement, efficient organization and analysis of suggestions, streamlined review and action, data-driven decision-making, and continuous improvement. However, challenges include managing suggestion volume, assessing suggestion quality, ensuring user participation, resource allocation, and technical implementation considerations. Despite challenges, a well-implemented suggestion box can foster collaboration and drive improvement within an organization.

REFERENCES

- *Trailhead:* Salesforce Platform Basics
- *Trailhead:* Data Modeling
- *Trailhead:* Lightning Experience Customization
- *Trailhead:* Salesforce Mobile App Customization
- *Trailhead:* Formulas & Validations
- *Trailhead*: Flow Builder Basics
- *Trailhead:* Reports & Dashboards for Lightning Experience