CHAPTER1

INTRODUCTION

Salesforce is the world's #1 CRM (Customer Relationship Management) where it unites Marketing, Sales, Commerce, IT etc teams to their customers to deliver a better service. We are determined to teach this emerging Technology in a very realistic and fun way. We have organized the challenges in such a way that the learner will be able to learn salesforce in a very enthusiastic and fun way with a limited time participation. This program consists of live sessions, Hands-on practical activities, Mentoring support and working on super badges on Trailhead platform. In order to help all beginners understand the salesforce ecosystem and its products, we have curated a few best modules on the trailhead platform also.

What is Salesforce?

Salesforce is a cloud-based customer relationship management (CRM) platform for supercharging every part of your company that interacts with customers including marketing, sales, commerce,service, and more.

What is CRM?

CRM stands for "customer relationship management" and it's stores customer contact information like names, addresses, and phone numbers, as well as keeps track of customer activity like website visits, phone calls, email, and more.

What Is A Salesforce Developer?

According to International Data Corporation (IDC), the Salesforce Economy is set to create 1.9 million direct and indirect jobs in India by 2024. For this reason and more, your friends and family might have recommended Salesforce as a career in the Information Technology (IT) space in India.

CHAPTER2

Technologies

Salesforce developers use Apex and VisualForce in their work. If you program in any object language, learning Apex will be relatively easy for you. The knowledge of relational databases and SQL and the basics of JavaScript and HTML are also useful in deployment.

TECHNICAL AND SPECIALIZED SKILLS RECRUITERS LOOK FOR

- Salesforce Platform.
- Lightning Web Components.
- JavaScript.
- Application Lifecycle Management.
- Object-oriented Programming.
- Apex.
- System Integration.
- SOQL / SOSL.

CHAPTER3

Applications Of Salesforce

Salesforce is a powerful CRM Tool which is often called Customer Relationship Management Tool that provides case management and task management interfaces for different types of events. Salesforce provides a different set of services such as PaaS i.e., Platform as a Service and Community Cloud services which have different uses.

Uses of Salesforce are as follows:

- **It provides Integration of different Services for organizational needs**

  The different types of needs and requirements of the organizations can be fulfilled by Salesforce by integrating multiple customer services and support services along with the CRM applications to improve customer satisfaction and increase the quality of future services by using the previous experience and feedback from the customer support services. The requirement of an organization can be based on the requirement of the client and applications of the product or program or of an application.

- **Integrate Social networking platforms**

  The data from different social networking sites can easily be integrated and data reports can be generated which can be easily understood at the instance to identify the customer insights. The data will be analyzed in different ways of extracting data and visualization forms.

- **Understand the customer data and identify their interests and perception**

  There is another kind of process in which Salesforce tool processes the data by extracting the customer data sets into meaningful information. The visual dashboards in Salesforce summarize the data with different types of representations such as Pictorial, Pie Charts, Bar Graphs, tabular or Graphical forms

- **Regain the inactive or old customers**

  There can be different types of customers who are inactive in using the services or applications of the Salesforce who are the potential sources of loss of

business in the customer relationship management whereby giving the offers or discounts in the cloud services or any other platform services could give them to rejoin the customer base that potentially improves the customer base and sales.

- **Increase sales by tracking Customer Interaction**

  Customer Interaction can be tracked easily by integrating the Customer Service Management application with uses of Salesforce and the customer interests can be easily identified to improve the business.

- **It is easier to handle the data and enhance the customer service and experience**

  The process of handling the different types of data is easier and customizing that data as per the requirement is simple by using the Salesforce tool. The processor features involved in Salesforce tool does not involve any kind of programming or coding or designing and it just needs a kind of drag and drops or tool features which is easier to operate and that also involves less learning curve for the users or customers.

- **Has greater community support**

  Salesforce has a group of great professionals with expert knowledge having the passion to learn and work together in supporting the complex issues in case of handling and managing data.

- **Improve the customer base**

  The Customer base can be understood by using the customer data and their experiences and this enables the production company to customize or rebuild the products as per the requirement of the customers.

- **Flexible Data Reporting and Analysis**

  The process of extracting the data and analyzing it contains different kinds of data types to be processed or analyzed in order to understand customer perception.

CHAPTER4

Modules Explanation

4.1.Trailhead and Trailblazer Community

At the heart of Trailhead and the Trailblazer Community is you—our Trailblazer. A trailblazer is:

- A pioneer; an innovator; a lifelong learner; a mover and shaker.
- A leader who leaves a path for others to follow.
- Most importantly, a person who builds a better world for others.

We have content for every role within an org, and every level of experience. Come to Trailhead and the Trailblazer Community to learn, earn, and connect, whether you're a representative using Service Cloud, a Salesforce solution architect, or an aspiring Salesforce professional. As a member of the Trailblazer Community you can join groups, where you can discuss different subjects with a group of Trailblazers. Some groups are role-, product-, or solution-based, while others are interest- or region-based (like the Salesforce Certified Professionals group or Hyderabad Community Group). You can also participate in—or start—a discussion around topics in the Trailblazer Community. A topic allows any Trailblazer to discuss or ask about a specific Salesforce subject, like #Service Cloud, #Mobile Development, or #MyTrailblazerStory. And because we know that you're blazing trails all over the world, Trailhead and the Trailblazer Community are available in ten languages: English, German, Japanese, French, Latin American Spanish, Spanish (Spain), Brazilian Portuguese, Korean, Simplified Chinese, and Italian.

4.2.Salesforce Platform Basics

Salesforce comes with a lot of **standard functionality**, or out-of-the-box products and features that you can use to run your business. Here are some common things businesses want to do with Salesforce and the features we give you that support those activities.

You need to:	So we give you:
Sell to prospects and customers	Leads and Opportunities to manage sales
Help customers after the sale	Cases and Communities for customer engagement
Work on the go	The customizable Salesforce mobile app
Collaborate with coworkers, partners, and customers	Slack, Chatter, and Communities to connect your company
Market to your audience	Marketing Cloud to manage your customer journeys

Table.4.1: Salesforce Platform

What Is the Salesforce Architecture?

By now you know that you can use Salesforce to deliver a highly customized experience to your customers, employees, and partners. You can do it without writing much (or any) code, and you can do it fast.

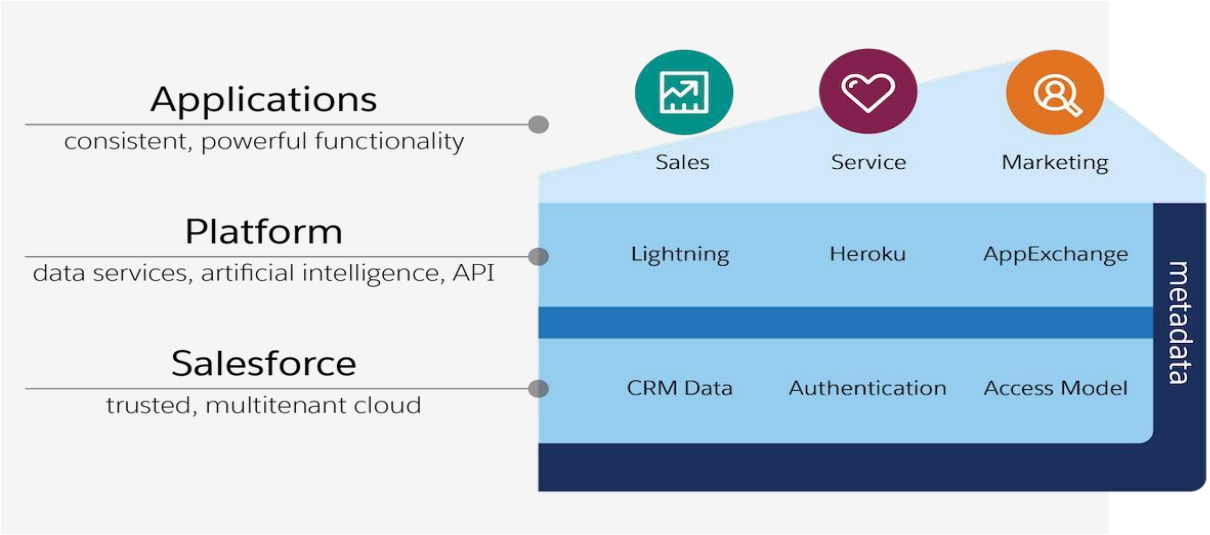

Figure.4.1: Salesforce Architechture

4.3.Picklist Administration

Anatomy of a Picklist

Picklists have two parts.

The field (1) defines the type of picklist. Can users select more than one value? Is this field dependent on another field for its value set? You set those options, and more, at the field level.

The value set (2) defines the choices a user sees, their order and the default value, and other settings.

Pretty basic, but this is an important distinction. You manage these two parts separately. For now, we focus on the field. In the next unit, you focus on the values.

We have three types of picklists:

- Standard
- Custom
- Custom Multi-Select

And picklist fields can have the following properties:

- Restricted
- Dependent or Controlling Values can be defined three ways:
- Set individual values when you create the picklist. These are specific to a single picklist field.
- Use the built-in set of values for the standard picklist fields that come with your Salesforce org.
- Create a global value set. A global value set is a custom set of values you create to share with more than one picklist field.

4.4.Duplicate Management

Salesforce helps your reps handle the duplicate records—from any device. And we give you options to prevent or discourage your sales reps from creating more duplicate

records with Duplicate Management. It's available to and free of charge for Professional, Enterprise, and Unlimited editions.

Duplicate Management helps you and your sales teams quickly and easily manage duplicates for:

- Business accounts
- Contacts
- Leads
- Person accounts
- Records created from custom objects

It's highly configurable, and offers you far more than just exact detection and matching logic. Our standard matching detects potential duplicate records based on exact matches, such as two contacts with the same name, Margaret Chan.But you can set up a rule to include fuzzy matching, which identifies potential duplicate records based on variances of certain fields. For example, you create a rule to include fuzzy matching for first names. Duplicate Management identifies the two contacts Margaret Chan and Maggie Chan as potential duplicate records.

4.5.Data Modeling

DreamHouse is a realty company that provides a way for customers to shop for homes and contact real estate agents online. DreamHouse brokers use some of Salesforce's standard functionality, like contacts and leads, to track home buyers.

But when it comes to selling houses, there are a lot more things they want to track. For example, Salesforce doesn't include a standard way to track properties. How is DreamHouse supposed to know which homes they have for sale or how much each home costs? Luckily, their Salesforce admin, D'Angelo, knows that the Salesforce platform offers a solution. We'll work with D'Angelo to see what he's building.

Let's start with the data model. A data model is more or less what it sounds like. It's a way to model what database tables look like in a way that makes sense to humans.If you're not familiar with databases, think about storing data in a spreadsheet. For example, D'Angelo can use a spreadsheet to track all DreamHouse's properties.

Columns can store the address, cost, and other important attributes. Rows can store this information for each property that DreamHouse is selling. Database tables are set up in a similar way. But looking at data in tables isn't ideal for humans. That's where the data model comes in.

In Salesforce, we think about database tables as objects, we think about columns as fields, and rows as records. So instead of an account spreadsheet or table, we have an Account object with fields and a bunch of identically structured records.

When we talk about the data model, we're talking about the collection of objects and fields in an app. Let's learn more about objects and fields so you can start building your own data model.

4.6.Formulas and Validations

4.6.1.Introduction to Formula Fields

You've got a lot of data in your organization. Your users need to access and understand this data at a glance without doing a bunch of calculations in their heads. Enter formula fields, the powerful tool that gives you control of how your data is displayed.

Let's say you wanted to take two numeric fields on a record and divide them to create a percentage. Or perhaps you want to turn a field into a clickable hyperlink for easy access to important information from a record's page layout. Maybe you want to take two dates and calculate the number of days between them. All these things and more are possible using formula fields.

Let's look at a specific example. What if you wanted to calculate how many days are left until an opportunity's close date? You can create a simple formula field that automatically calculates that value. By adding the value to the Opportunity page layout, your users can quickly access this key information. You can also add this field to reports and list views for instant access.

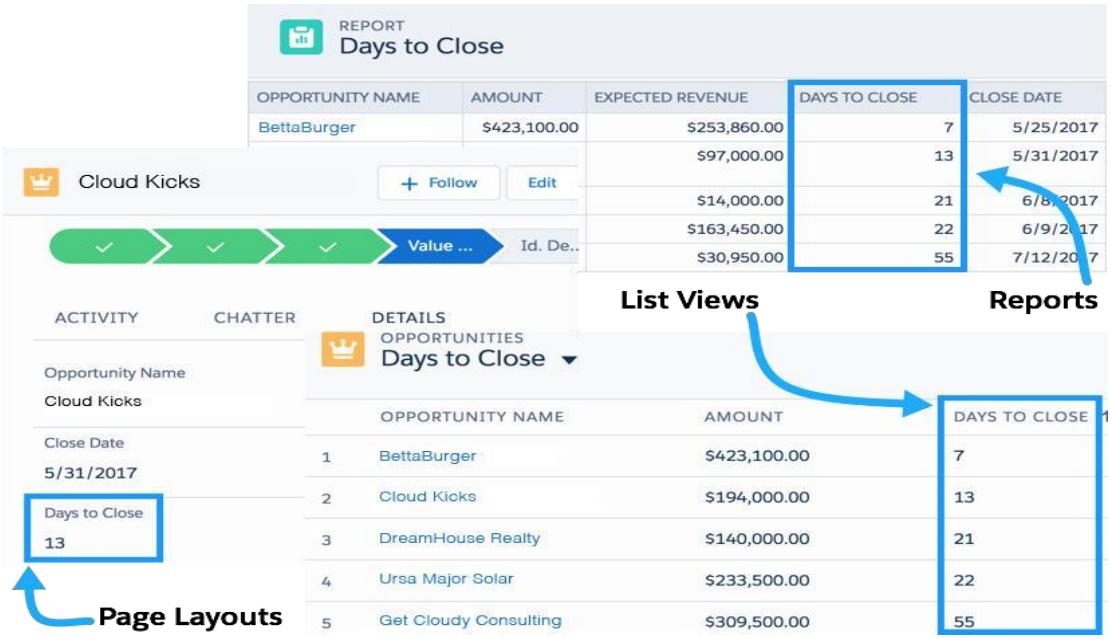

Figure.4.2:Reports and List Views

When you're first learning formulas, it's best to start with simple calculations and build up to more complex scenarios. But even simple formulas can provide valuable information.

4.6.2.Debug Formulas

Syntax errors are an inevitable part of working with formulas. The **Check Syntax** button in the editor is an important tool for debugging your formulas. The syntax checker tells you what error it encountered and where it's located in your formula. Here are some common syntax issues.

1. **Missing parentheses:**

   This error most often occurs when the number of opening parentheses doesn't match the number of closing parentheses. It can be particularly difficult to avoid this error if you're using several functions at once. You'll also see this errr if you forget a comma between two function parameters. This error is confusing because the actual problem doesn't match up with the syntax checker. If you're certain your parentheses are correct, double check that the commas in your function are correct as well.

2. **Incorrect parameter type:**

   If you give a function a number parameter when it expects text (or any other combination of data types), this is the error you see. Always check the help text or the documentation so you know what kind of parameters a function accepts.

3. **Incorrect number of parameters for function:**

   If you input too many or too few parameters into a function, the syntax checker alerts you. Again, check the help text or documentation for guidelines on inputting parameters to specific functions.

4. **Formula result is incompatible with formula return type:**

   You see this error if you select one data type when creating the formula field but write a formula that returns a different data type. In the example below, you can see that My Account Formula expects to return a number (shown in parentheses next to the formula name), but the TODAY() function returns a date. The error tells you what the expected data type is, but you can always reference the documentation beforehand to avoid the error.

5. **Field does not exist:**

   This error indicates that you've included a field in your formula that your object doesn't support. In this case, check your spelling and capitalization. If you can't find any mistakes, try inserting the field from the Insert Field menu again to make sure you're referencing it correctly. Another reason you see this error is if you forget to put quotation marks around a text literal or a hyperlink.

6. **Unknown function**:

   In this case, check that Salesforce supports the functions you're using.

   You also get this error for misspelled functions.

4.6.3 Minimum List Price of An Opportunity

A roll-up field was created on the Opportunities object. List Price is summarized on the Opportunity Product object to find the product with the lowest price related to an opportunity.

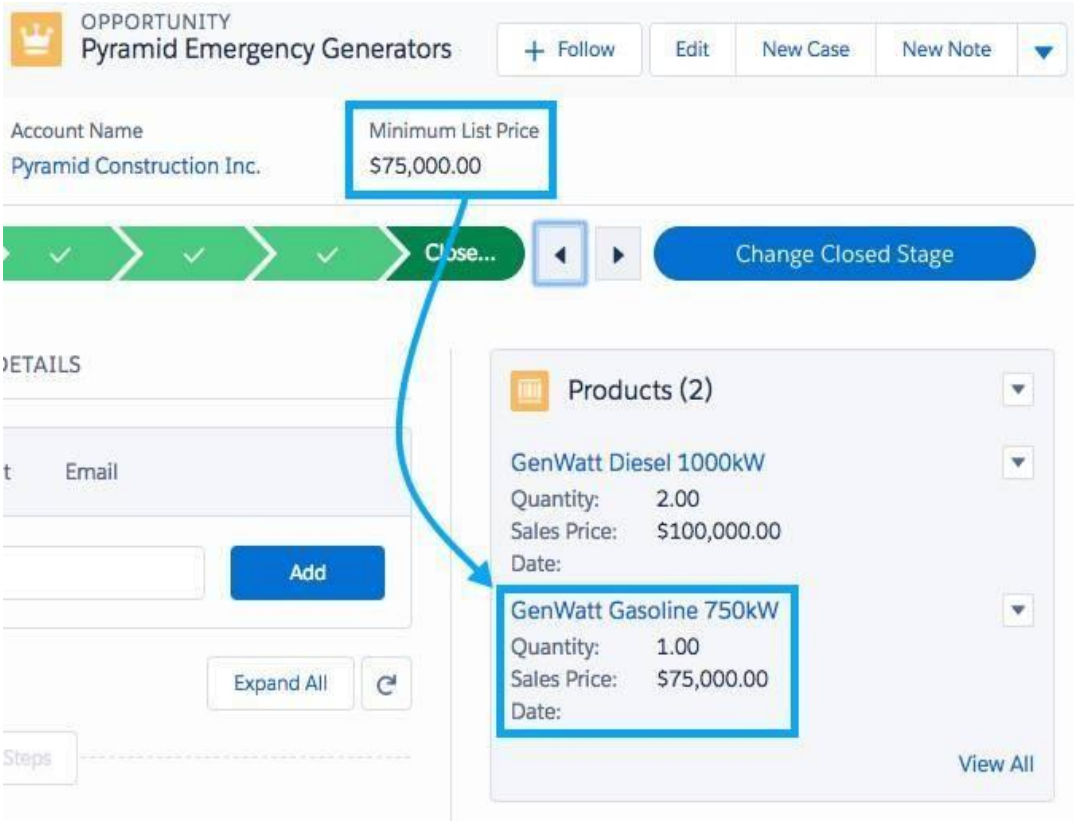

Figure.4.3:Minimum List Price

4.6.4.Introduction to Validation Rules

Validation rules verify that data entered by users in records meets the standards you specify before they can save it. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False.” When the validation rule returns a value of "True", this confirms that the data entered by the user contains an invalid value. Validation rules can also include error messages to display to users when they enter invalid values based on specified criteria. Using these rules effectively contributes to quality data. For example, you can ensure that all phone number fields contain a specified format or that discounts applied to certain products never exceed a defined percentage.

4.7.Approve Records with Approval Processes

An approval process automates how Salesforce records are approved in your org. In an approval process, you specify:

The steps necessary for a record to be approved and who approves it at each step. For example, when an employee creates a time-off request, have Salesforce automatically send an approval request to the employee's manager.

The actions to take based on what happens during the approval process. For example, if a time-off request is approved, update fields on the employee's record. But if the request is rejected, send a notification to the employee.

Let's look at an example approval process to see how a record moves through various steps of the process. In this example, a user submits a request for a new position in a company.

When a user first requests approval for a new position, initial submission actions occur. The default initial submission action locks the record. This action ensures that other users (except for approvers and admins) can't change the record while it's pending approval. Other possible submission actions include sending an email alert, updating a field on a record, creating a task, and sending an outbound message.Approval steps assign approval requests to various users and define the chain of approval for a particular approval process. In this example, the first step assigns the approval request to the submitter's direct manager.

If the direct manager rejects the request, the final rejection actions are executed, setting the position's approval status to Rejected.

If the direct manager approves the request, the record moves to the next step— approval from the CEO. If the CEO rejects the position, the same final rejection actions occur.

If the CEO approves the position, final approval actions are executed. They set the approval status to Approved, unlock the record for future updates, and notify the employee who requested the new position.

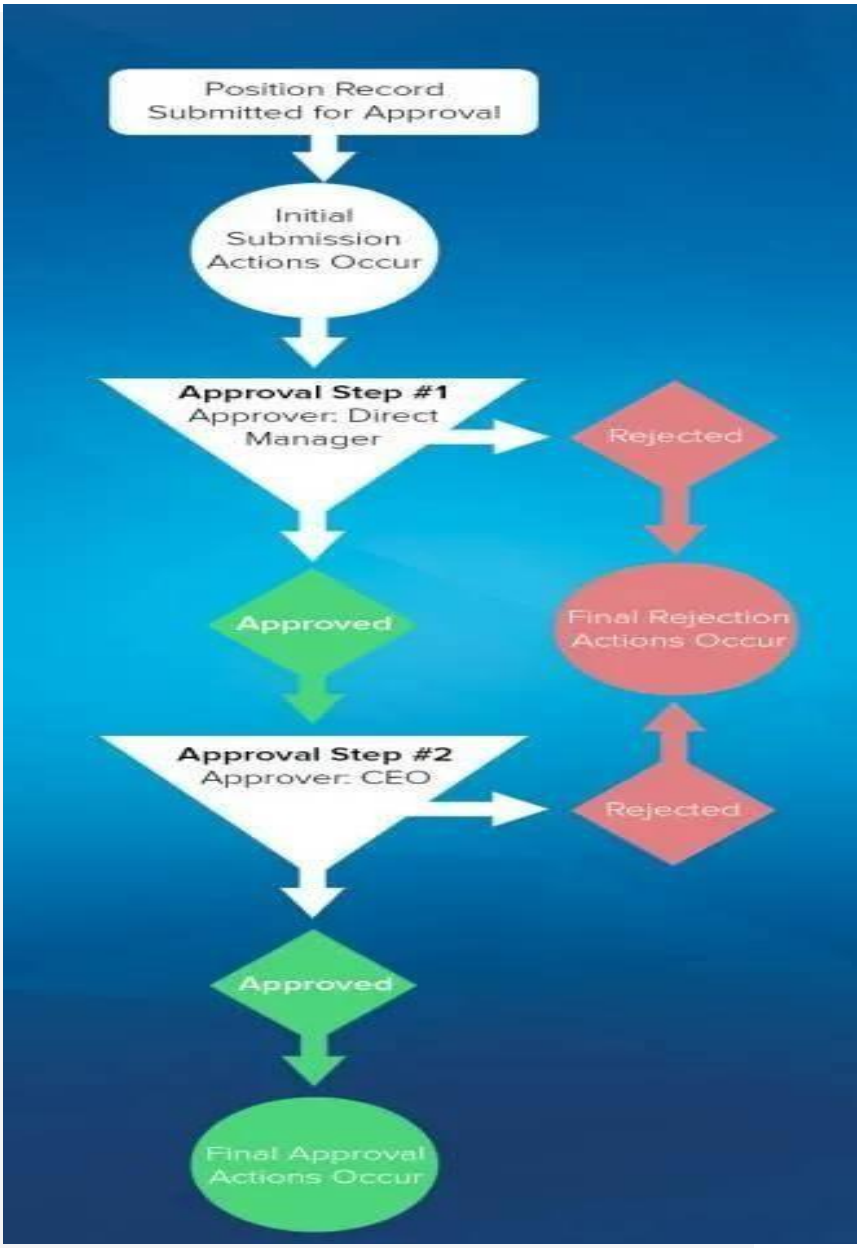

Figure.4.4:Approval Records with Approval process

Final approval actions occur only when a record is approved and there are no further approval steps.

4.8.Lightning App Builder

4.8.1With the Lightning App Builder, you can build:

- Single-page apps that drill down into standard pages

- Dashboard-style apps, such as apps to track top sales prospects or key leads for the quarter
- “Point” apps to solve a particular task, such as an expense app for users to enter expenses and monitor expenses they’ve submitted
- Custom record pages for your objects, tailored to the needs of your users
- Custom Home pages containing the components and features that your users use most

  A Lightning page is a custom layout that lets you design pages for use in the Salesforce mobile app or Lightning Experience. A Lightning page is composed of regions that contain components.

  A Lightning component is a compact, configurable, and reusable element that you can add to a Lightning page in the Lightning App Builder.

4.8.2 Lightning pages support these components:

- Standard Components - Standard components are Lightning components built by Salesforce.
- Custom Components - Custom components are Lightning components that you or someone else have created. You can configure custom Lightning components to work in Lightning App Builder.
- Third-Party Components on AppExchange - The AppExchange provides a marketplace for Lightning components. You can find packages containing components already configured and ready to use in the Lightning App

  Builder.

4.9.Flow Builder

In flows, resources are placeholders similar to merge fields in an email template or a formula. Let's say you start an email with Hi, {!$User.FirstName}. {!$User.FirstName} is a placeholder, so when the email is sent, it displays the actual

first name of the user. In each step of the flow (the elements added to the canvas), you can reference flow resources instead of manually entering values.

Example:

In the Build a Discount Calculator project, the flow updates an opportunity's

Discount field. But not every opportunity gets the same discount; it's determined by the associated account's revenue. A variable acts as a placeholder for the discount percentage and is set to a different percentage based on the flow logic. The flow then uses the variable to update the opportunity's discount.

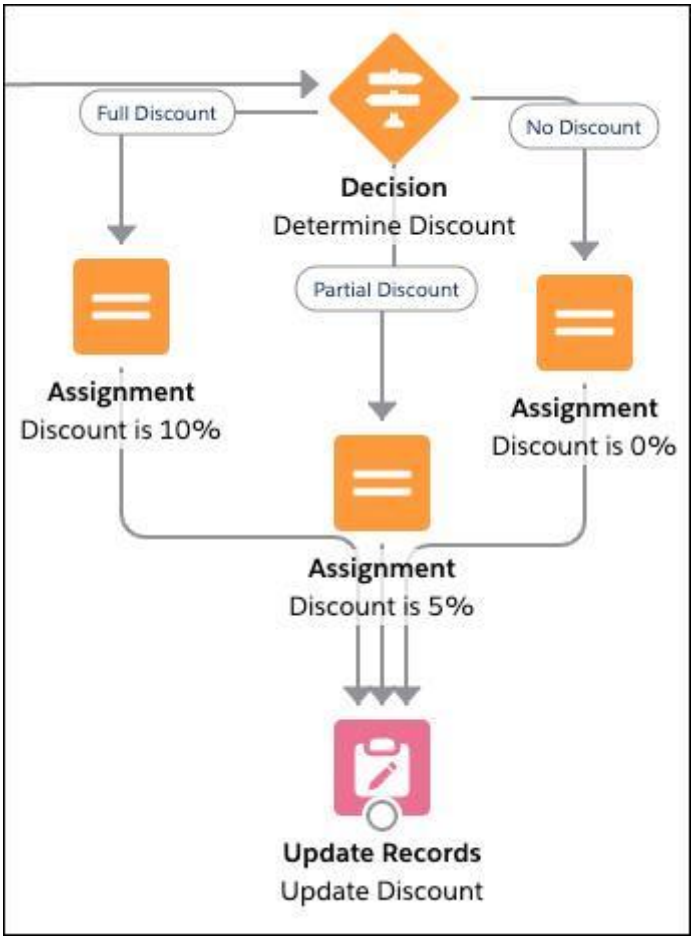

Figure.4.5: Discount Calculator

4.10.Data Management

You can easily import external data into Salesforce. Supported data sources include any program that can save data in the comma delimited text format (.csv).

4.10.1.Salesforce offers two main methods for importing data:

- **Data Import Wizard**

  This tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects. It can import up to 50,000 records at a time. It provides a simple interface to specify the configuration parameters, data sources, and the field mappings that map the field names in your import file with the field names in

  Salesforce.

- **Data Loader**

  This is a client application that can import up to five million records at a time, of any data type, either from files or a database connection. It can be operated either through the user interface or the command line. In the latter case, you need to specify data sources, field mappings, and other parameters via configuration files. This makes it possible to automate the import process, using API calls.

4.10.2. Introduction to Data Export

You can easily export data from Salesforce, either manually or on an automatic schedule. The data is exported as a set of comma-separated values (CSV) files. Data export tools provide a convenient way to obtain a copy of your Salesforce data, either for backup or for importing into a different system.

Salesforce offers two main methods for exporting data.

- **Data Export Service**

  An in-browser service, accessible through the Setup menu. It allows you to export data manually once every 7 days (for weekly export) or 29 days (for monthly export). You can also export data automatically at weekly or monthly intervals. Weekly exports are available in Enterprise, Performance, and Unlimited Editions. In Professional Edition and Developer Edition, you can generate backup files only every 29 days, or automatically at monthly intervals only.

- **Data Loader**

  A client application that you must install separately. It can be operated either through the user interface or the command line. The latter option is useful if you want to automate the export process, or use APIs to integrate with another system.

4.11.Data Security

Choosing the data set each user or group of users can see is one of the key decisions that affects the security of your Salesforce org or app. Once you've designed and implemented your data model, give some thought to the kinds of things your users are doing and the data they need to do it. If you haven't completed the Data Modeling module, go ahead and earn that badge before continuing with this module.

Let's say you're building a recruiting app to help manage open positions, candidates, and job applications. You'll have to store confidential data, such as social security numbers, salary amounts, and applicant reviews, that only some types of users should see. You'll want to secure the sensitive data without making life harder for recruiters, hiring managers, and interviewers.

With the Salesforce platform's flexible, layered sharing model, it's easy to assign different data sets to different sets of users. You can balance security and convenience, reduce the risk of stolen or misused data, and still make sure all users can easily get the data they need.

The platform makes it easy to specify which users can view, create, edit, or delete any record or field in the app. You can control access to your whole org, a specific object, a specific field, or even an individual record. By combining security controls at different levels, you can provide just the right level of data access to thousands of users without having to specify permissions for each user individually.

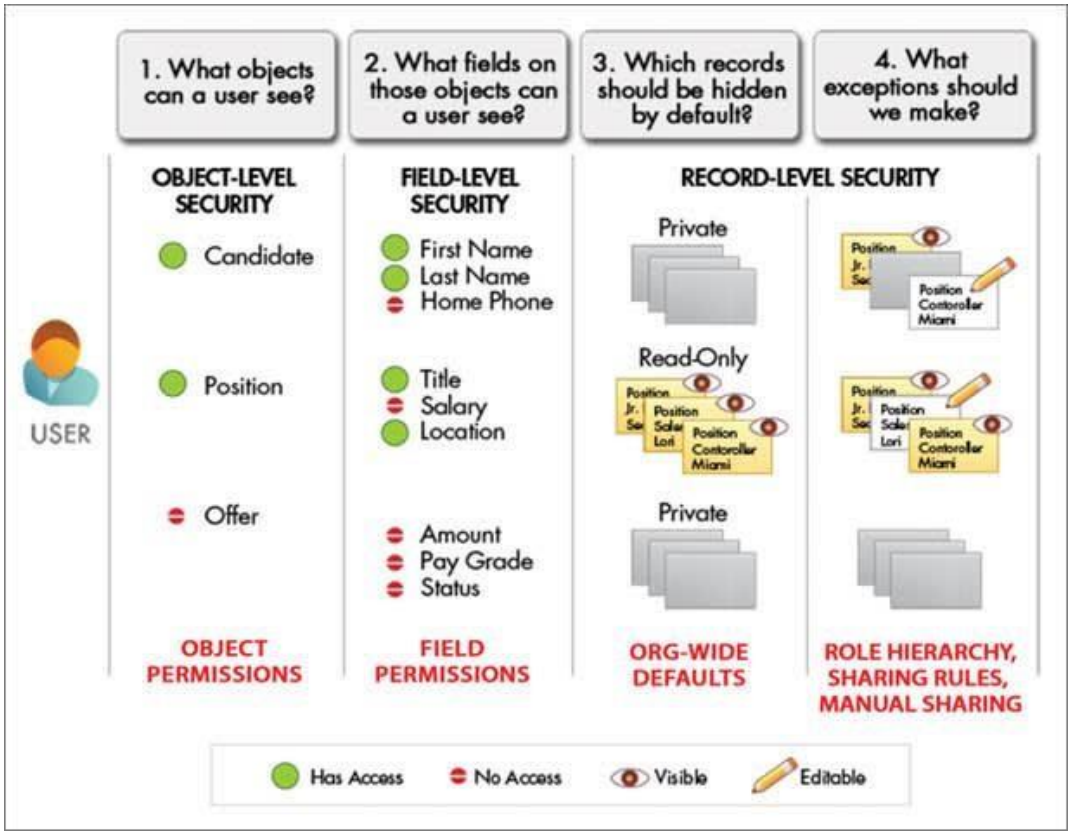

Figure.4.6:Controlling Data Access

4.12.API Basics

What Is an API?

An API is equivalent to a user interface, except it's designed for software instead of humans.

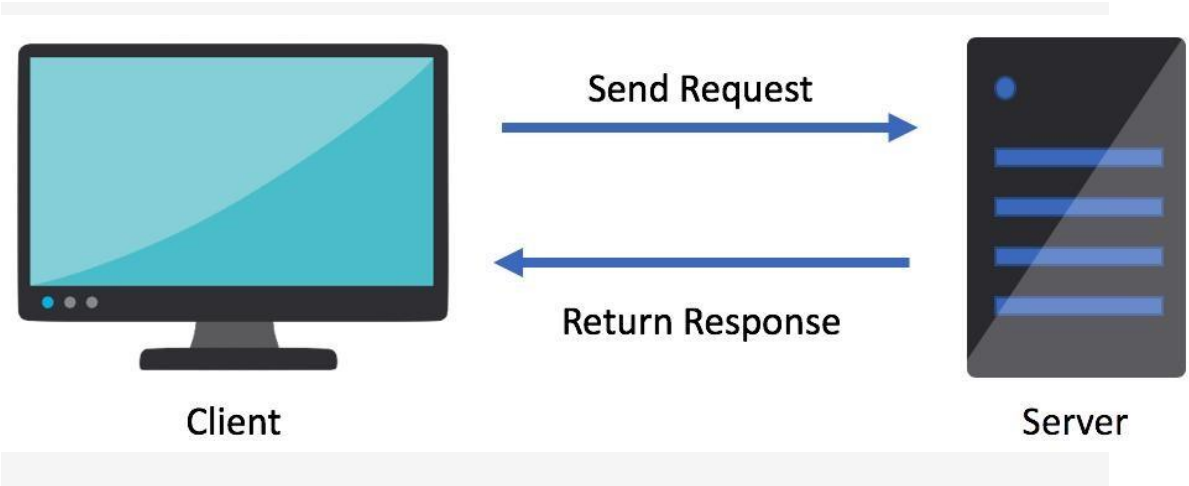

Figure.4.7:API User Interface

The client sends a request for specific information or functionality to another system. That system returns the data or functionality in a response. To send or receive data, there is an expectation that it will be in a specific format that both sides can understand. That format is often very sensitive to the context(s) it serves. Let's take a closer look.

A business owner at a local fitness club wants to plug in her new gym equipment for the club's new location. She knows that since she lives in North America, she needs a US household plug to do this. She also knows wall sockets deliver 120 volts of electricity. These known guidelines essentially set an expectation for any device needing to be plugged into the wall.

API Economy

Depending on the volume of calls or some other way of breaking down different tiers of service, a provider like Google might charge the application developer a fee for using the API. This gives rise to the idea of an API economy.

4.13.Apex Triggers

Apex triggers enable you to perform custom actions before or after events to records in Salesforce, such as insertions, updates, or deletions. Just like database systems support triggers, Apex provides trigger support for managing records.

Typically, you use triggers to perform operations based on specific conditions, to modify related records or restrict certain operations from happening. You can use triggers to do anything you can do in Apex, including executing SOQL and DML or calling custom Apex methods.

Use triggers to perform tasks that can't be done by using the point-and-click tools in the Salesforce user interface. For example, if validating a field value or updating a field on a record, use validation rules and flows instead

Triggers can be defined for top-level standard objects, such as Account or Contact, custom objects, and some standard child objects. Triggers are active by default when created. Salesforce automatically fires active triggers when the specified database events occur.

4.14.Apex Testing

The Apex testing framework enables you to write and execute tests for your Apex classes and triggers on the Lightning Platform. Apex unit tests ensure high quality for your Apex code and let you meet requirements for deploying Apex.

Testing is the key to successful long-term development and is a critical component of the development process. The Apex testing framework makes it easy to test your Apex code. Apex code can only be written in a sandbox environment or a Developer org, not in production. Apex code can be deployed to a production org from a sandbox. Also, app developers can distribute Apex code to customers from their Developer orgs by uploading packages to the Lightning Platform AppExchange. In addition to being critical for quality assurance, Apex unit tests are also requirements for deploying and distributing Apex.

4.14.1. These are the benefits of Apex unit tests.

- Ensuring that your Apex classes and triggers work as expected
- Having a suite of regression tests that can be rerun every time classes and triggers are updated to ensure that future updates you make to your app don’t break existing functionality
- Meeting the code coverage requirements for deploying Apex to production or distributing Apex to customers via packages
- High-quality apps delivered to the production org, which makes production users more productive
- High-quality apps delivered to package subscribers, which increase your customers trust

4.15.Asynchronous Apex

An asynchronous process is a process or function that executes a task "in the background" without the user having to wait for the task to finish.

Here’s a real-world example. Let’s say you have a list of things to accomplish before your weekly Dance Revolution practice. Your car is making a funny noise, you

need a different color hair gel and you have to pick up your uniform from your mom's house. You could take your car to the mechanic and wait until it is fixed before completing the rest of your list (synchronous processing), or you could leave it there and get your other things done, and have the shop call you when it's fixed (asynchronous processing). If you want to be home in time to iron your spandex before practice, asynchronous processing allows you to get more stuff done in the same amount of time without the needless waiting.

4.16.Apex Integration Services

An Apex callout enables you to tightly integrate your Apex code with an external service. The callout makes a call to an external web service or sends an HTTP request from Apex code, and then receives the response.

Apex callouts come in two flavors.

Web service callouts to SOAP web services use XML, and typically require a WSDL document for code generation.

HTTP callouts to services typically use REST with JSON.

These two types of callouts are similar in terms of sending a request to a service and receiving a response. But while WSDL-based callouts apply to SOAP Web services, HTTP callouts can be used with any HTTP service, either SOAP or REST.

So you are probably asking yourself right now, "Which one should I use?" Whenever possible, use an HTTP service. These services are typically easier to interact with, require much less code, and utilize easily readable JSON. All the "cool kids" have been switching to REST services over the last couple of years, but that's not to say that SOAP Web services are bad. They've been around forever (in Internet years) and are commonly used for enterprise applications. They are not going away anytime soon. You'll probably use SOAP mostly when integrating with legacy applications or for transactions that require a formal exchange format or stateful operations. In this module we'll touch on SOAP, but will spend most of our time on REST.

4.17.**Leads & Opportunities for Lightning Experience**

Qualifying a lead indicates that you believe the lead has a use for and interest in your products, and that a sale is a definite possibility. Some businesses choose to qualify leads more quickly than others. The exact criteria for qualifying and converting leads are part of your company's unique business process.

When you qualify a lead, you can convert the lead record into an opportunity. You then work your opportunity until you close the deal either by completing it or canceling it.

Suppose that you call Aparna at Get Cloudy West to talk about her deal. She likes what you tell her, and you're sure she has a genuine interest in buying custom shoes. Your lead is ready to be converted to an opportunity.

When you convert a lead, Salesforce uses the information stored in the lead record to create a business account, a contact, and an opportunity. If you've enabled person accounts and the lead record didn't include a company name, the lead is converted into a person account and an opportunity.

CHAPTER5

Real Time Examples

We've said it before, and we'll say it again – managing a field service team is not an easy feat without an automated system. It takes a lot of coordination to make it work – be it scheduling resources, creating work orders, keeping track of inventory, or addressing customer issues. Field Service Lightning, an extension of Service Cloud is now adopted among numerous industries, which includes retail, healthcare, public utilities and transportation, telecommunications, manufacturing, waste management, financial services, professional services and so much more! This clearly signals a massive shift in the way the Field Service teams are aiming to bolster customer experience irrespective of industries or service offerings. In this blog, we'll discuss three use case examples of Salesforce Field Service Lightning & how FSL can help empower field service providers in different business sectors.

Examples of Salesforce Field Service Lightning Example

Use Case #1:

A water purifier manufacturer who facilitates water purifier installations and maintenance inresidential buildings, corporates, schools, and so on. The team consists of experienced project managers, field technicians, and other administrative staff.

Challenge:

Increased difficulty in coordinating work orders between field service staff and dispatchers.

How can FSL help?

With FSL in place, the managers can dispatch the field executives and enable them with real-time data on the go. With Salesforce being their central hub for all their service needs, they can now easily streamline operations and optimize the dispatching process. Be it scheduling, getting customer service history or resolving the case itself, it can all be done within one platform powered by Service Cloud capabilities. Now field technicians can access available appointments, manage routes and get a proper understanding of what issues need to be addressed. This helps them in increasing their productivity and truly work as an extension of their company.

Example Use Case # 2:

An electronic retail chain that sells home appliances such as TV, home theatres, refrigerators, washing machines and so on. Their team of technicians, admins and store managers overlook installation and maintenance work orders on a day-today basis.

Challenge:

Manually managing and planning service visits while receiving so many incoming orders turned out to be ineffective and an extremely costly affair for the store. Also, the customers did not get any instant feedback regarding repairs and the current status of the particular issue or when the technician would arrive for the repair. How can FSL help?

Now the store managers can get a birds eye view of all the details regarding their field technician – what are their available slots, what issue did they fix, how much time did they spend on the case, customer feedback etc.

Example Use Case #3:

A furniture manufacturer and dealer

Challenge:

The company struggled with complex logistics and inefficiencies in resource allocation. The customer details were entered manually outside of their current CRM. Existing basic processes were not enough to keep up with their rapid business expansion.

How can FSL help?

By integrating FSL with their existing systems, they now access all important data, schedules, inventory, customer details etc.They can now stay connected on the job, regardless of their current location. They now spend less time on logistics and more time on providing excellent customer service using fully automated, paperless tools.

Field service is not just about a successful installation or a repair outcome anymore.

Delivering seamless, end-to-end customer service is paramount for a service provider to be a key player in their industry.

CHAPTER6

LEARNING OUTCOMES

The objectives of a student participating in an internships or co-op are to:

- Explore career alternatives prior to graduation.
- Integrate theory and practice.
- Assess interests and abilities in their field of study.
- Learn to appreciate work and its function in the economy.
- Develop work habits and attitudes necessary for job success.
- Develop communication, interpersonal and other critical skills in the job interview process.
- Build a record of work experience.
- Acquire employment contacts leading directly to a full-time job following graduation from college.
- Identify, write down, and carry out performance objectives (mutually agreed upon by the employer, the MCC experiential learning supervisor, and the student) related to their job assignment.

Conclusion

The different areas and multiples areas of applications in the field of Customer Relationship and its management and also the utilization of Data tools contain Salesforce as one of the top utilized applications which have become a major one among the top CRM or tool. This clearly resembles that the greater utilization of Salesforce tool exists in the area of Data Reporting and Analysis where still as there are many numbers of tools available in the current market i.e., in the current era of the digital data world. Increase in the customer base and daily requirements or the customer relationship and sales-related activities, the uses of Salesforce tool has been an ideal solution for many of the businesses in the latest arena of the digital world with a lot of innovations and technology breakthroughs for highly complex data analysis and data reporting.

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October 30, 2023

MOHAMMAD MANZOOR SYED

Salesforce Developer Virtual Internship

During the 8 Weeks period of Virtual Internship **(August-October 2023),** MOHAMMAD MANZOOR SYED has completed the following Salesforce Trailhead modules

Salesforce Fundamentals
Organizational Setup
Relationship & Process Automation
Types Of Flows & Security
Apex, Testing & Debugging
VS Code Setup & CLI Setup
Lightning Web Components (LWC) & API

Developer Super Set

Certificate ID: SISFVIPAD2023 -65852 | Verify this certificate @ https://smartinternz.com/internships/salesforce_certificates/adebe1b4a332ae019c5cbb114397cf51

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