

Phase 7: Integration & Internal Access

1.Platform Events

- Setup-> Platform Events-> New Platform Events

Discount Booking Completed

Q platform event

Integrations

Platform Events

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

Platform Event

Discount Booking Completed

Standard Fields (6) | Custom Fields & Relationships (4)

Platform Event Definition Detail

Edit

Delete

Singular Label

Discount Booking Completed

Description

Plural Label

Discount Bookings Completed

Deployment Status

Deployed

Object Name

Discount_Booking_Completed

API Name

Discount_Booking_Completed__e

Event Type

High Volume

Publish Behavior

Publish Immediately

Created By

Tanvi Markad, 25/09/2025, 10:32 pm

Modified By

Tanvi Markad, 25/09/2025, 10:32 pm

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	<u>Created By</u>	CreatedBy	Lookup(User)		
	<u>Created Date</u>	CreatedDate	Date/Time		
	<u>Event UUID</u>	EventUuid	Text(36)		
	<u>Replay ID</u>	ReplayId	External Lookup		

Custom Fields & Relationships

New

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
	<u>Booking Value</u>	Booking_Value__c	Number(16, 2)			Tanvi Markad, 25/09/2025, 10:36 pm
	<u>Campaign ID</u>	Campaign_ID__c	Text(18)			Tanvi Markad, 25/09/2025, 10:34 pm
	<u>Customer Name</u>	Customer_Name__c	Text(80)			Tanvi Markad, 25/09/2025, 10:34 pm
	<u>Discount %</u>	Discount__c	Number(3, 0)			Tanvi Markad, 25/09/2025, 10:35 pm

- Custom Objects

Setup

Home

Object Manager

Q platform event

Integrations

Platform Events

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

Platform Events

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	<u>Created By</u>	CreatedBy	Lookup(User)		
	<u>Created Date</u>	CreatedDate	Date/Time		
	<u>Event UUID</u>	EventUuid	Text(36)		
	<u>Replay ID</u>	ReplayId	External Lookup		

Custom Fields & Relationships

New

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	<u>Booking Value</u>	Booking_Value__c	Number(16, 2)			Tanvi Markad, 25/09/2025, 10:36 pm
Edit Del	<u>Campaign ID</u>	Campaign_ID__c	Text(18)			Tanvi Markad, 25/09/2025, 10:34 pm
Edit Del	<u>Customer Name</u>	Customer_Name__c	Text(80)			Tanvi Markad, 25/09/2025, 10:34 pm
Edit Del	<u>Discount %</u>	Discount__c	Number(3, 0)			Tanvi Markad, 25/09/2025, 10:35 pm

2.Change Data Capture

- Setup->Change Data Capture->Available Entity>Selected Entity

The screenshot shows the Salesforce Setup interface for Change Data Capture. The left sidebar has a search bar with "change data" and a list of integrations including "Change Data Capture". The main content area has a header with a search bar and a description: "Select the entities that generate change event notifications on the default standard channel. Change Data Capture sends notifications for created, updated, deleted, and undeleted records. All custom objects and a subset of standard objects are supported." Below this are two panels: "Available Entities" and "Selected Entities". The "Available Entities" panel has a search bar and a list of entities including Account, Account Clean Info, Account Contact Role, Asset, Asset Relationship, Assigned Resource, Associated Location, Authorization Form, Authorization Form Consent, and Authorization Form Data Use. The "Selected Entities" panel shows "Promotion Campaign (Promotion_Campaign...)" and "Discount Booking (Discount_Booking__c)".

Setup Home Object Manager

change data

Integrations

Change Data Capture

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

Select the entities that generate change event notifications on the default standard channel. Change Data Capture sends notifications for created, updated, deleted, and undeleted records. All custom objects and a subset of standard objects are supported.

Available Entities

Type to filter list...

Account (Account)

Account Clean Info (AccountCleanInfo)

Account Contact Role (AccountContactRol...

Asset (Asset)

Asset Relationship (AssetRelationship)

Assigned Resource (AssignedResource)

Associated Location (AssociatedLocation)

Authorization Form (AuthorizationForm)

Authorization Form Consent (Authorizatio...

Authorization Form Data Use (Authorizati...

Selected Entities

Promotion Campaign (Promotion_Campaign...

Discount Booking (Discount_Booking__c)

3. External Services/Salesforce Connect

- Setup-> External Data Sources->New External Data Source

○Marketing System

The screenshot shows the Salesforce Setup interface for External Data Sources. The left sidebar has a search bar with "external data" and a list of integrations including "External Data Sources". The main content area has a header with the "External Data Sources" title and a description: "Access data in other Salesforce orgs as well as third-party databases and content systems." Below this is a table with columns for Action, Name, External Data Source, Type, and URL. The table contains one row for "Marketing_System" with type "Salesforce Connect: OData 2.0" and URL "https://services.odata.org/V2/Northwind/Northwind.svc/".

external data

Integrations

External Data Sources

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

External Data Sources

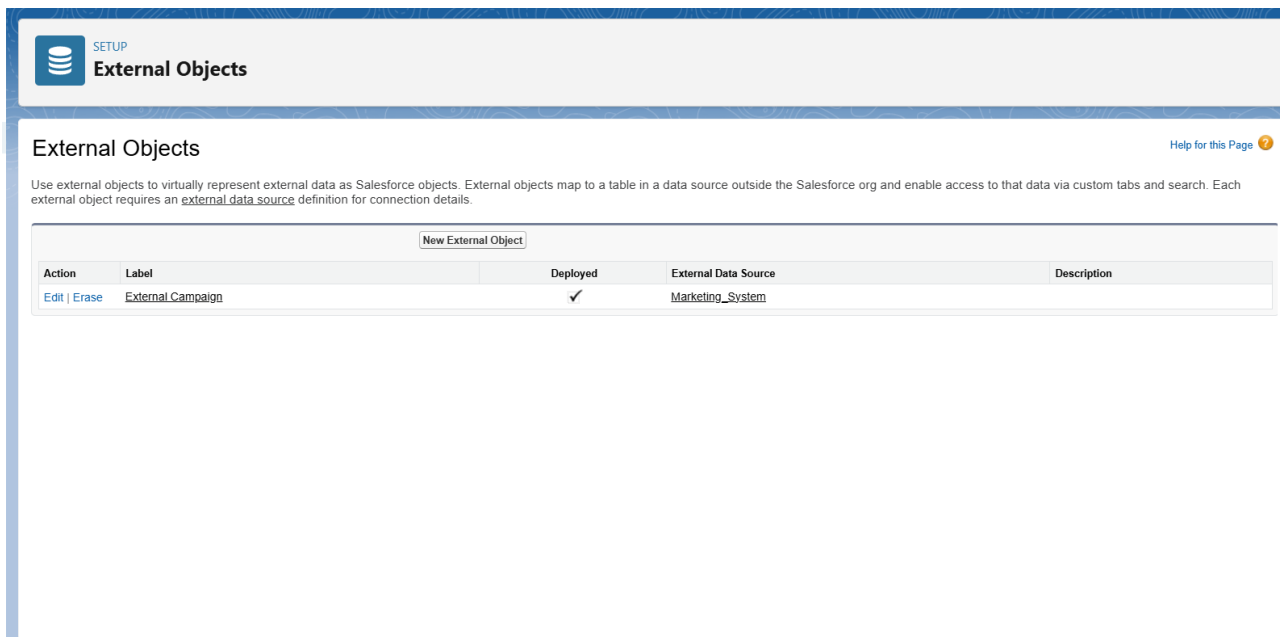
Access data in other Salesforce orgs as well as third-party databases and content systems.

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Name	External Data Source	Type	URL
Edit Del	Marketing_System	Marketing System	Salesforce Connect: OData 2.0	https://services.odata.org/V2/Northwind/Northwind.svc/

- **Setup-> External Objects->New External Objects**
 - **External Campaign**



External Objects

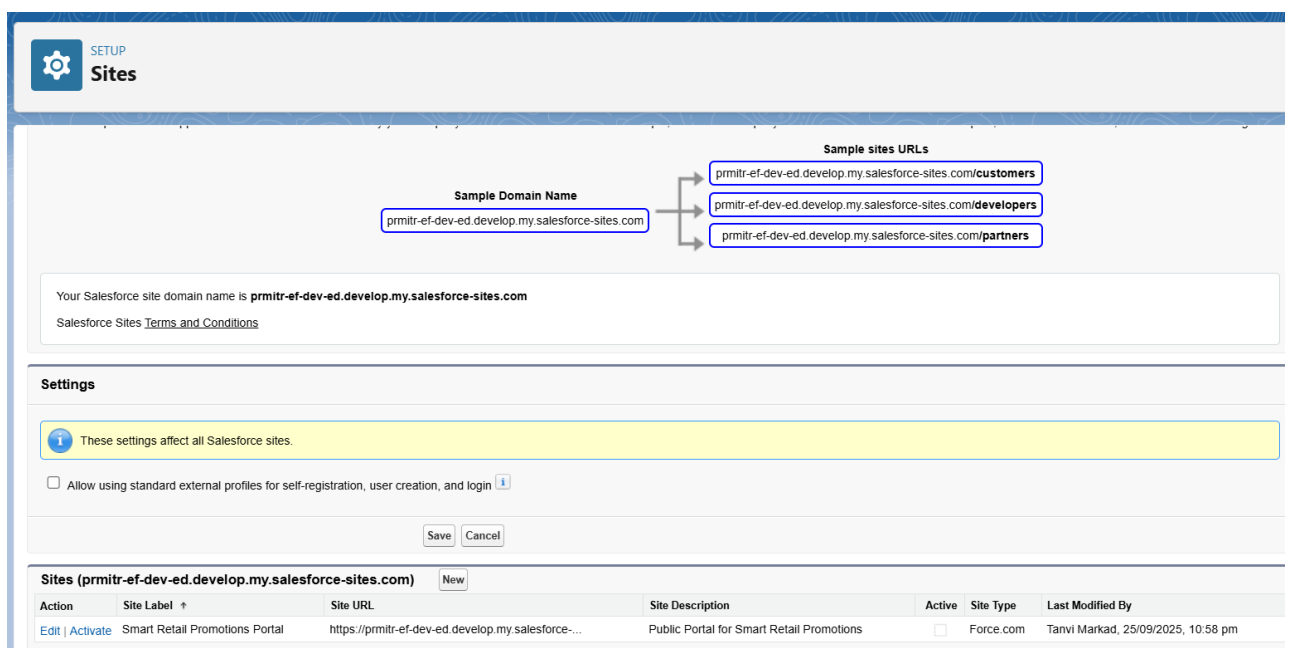
Use external objects to virtually represent external data as Salesforce objects. External objects map to a table in a data source outside the Salesforce org and enable access to that data via custom tabs and search. Each external object requires an [external data source](#) definition for connection details.

[Help for this Page](#)

[New External Object](#)

Action	Label	Deployed	External Data Source	Description
Edit Erase	External Campaign	✓	Marketing_System	

- **Setup->All Sites**



Sites

Sample Domain Name
prmitr-ef-dev-ed.develop.my.salesforce-sites.com

Sample sites URLs

- prmitr-ef-dev-ed.develop.my.salesforce-sites.com/customers
- prmitr-ef-dev-ed.develop.my.salesforce-sites.com/developers
- prmitr-ef-dev-ed.develop.my.salesforce-sites.com/partners

Your Salesforce site domain name is **prmitr-ef-dev-ed.develop.my.salesforce-sites.com**
Salesforce Sites [Terms and Conditions](#)

Settings

These settings affect all Salesforce sites.

☐ Allow using standard external profiles for self-registration, user creation, and login [i](#)

[Save](#) [Cancel](#)

Sites (prmitr-ef-dev-ed.develop.my.salesforce-sites.com) [New](#)

Action	Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Activate	Smart Retail Promotions Portal	https://prmitr-ef-dev-ed.develop.my.salesforce-...	Public Portal for Smart Retail Promotions	<input type="checkbox"/>	Force.com	Tarvi Markad, 25/09/2025, 10:58 pm

5.Process Builder To Skip Flows

1. Discount Type

- **Setup->Object Manager->Promotion Campaign->Field and Relationship**

Promotion Campaign

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Promotion Campaign Custom Field

Discount Type

[Back to Promotion Campaign](#)

[Help for this Page](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail

[Edit](#)

[Set Field-Level Security](#)

[View Field Accessibility](#)

[Where is this used?](#)

Field Information

Field Label	Discount Type	Object Name	Promotion Campaign
Field Name	Discount_Type	Data Type	Picklist
API Name	Discount_Type__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Tanvi Markad, 21/09/2025, 2:30 pm	Modified By	Tanvi Markad, 21/09/2025, 2:30 pm

General Options

- Report Subscriptions

Report: Promotion Campaigns
New Promotion Campaigns Report

[Enable Field Editing](#) [Add Chart](#) [Edit](#)

Total Records: 150

Discount Type	Discount Value	Promotion Campaign: Promotion Campaign Name	End Date	Start Date	Products Included	Status	Created By (std)	Last Modified By	Promotion Campaign: ID
- (100)	₹8 (1)	Promotion Campaign 72	16/01/2025	05/01/2025	Product A	-	-	-	a00dL000027buwY
	Subtotal								
	₹9 (1)	Promotion Campaign 46	08/01/2025	02/01/2025	Product A	-	-	-	a00dL000027buwY
	Subtotal								
	₹10 (1)	Promotion Campaign 45	29/01/2025	18/01/2025	Product D	-	-	-	a00dL000027buwX
	Subtotal								
	₹11 (1)	Promotion Campaign 75	11/02/2025	30/01/2025	Product A	-	-	-	a00dL000027bux1
	Subtotal								
	₹11 (1)	Promotion Campaign 94	30/01/2025	15/01/2025	Product B	-	-	-	a00dL000027buxK
	Subtotal								
	₹12 (1)	Promotion Campaign 43	27/01/2025	13/01/2025	Product B	-	-	-	a00dL000027buwV
	Subtotal								
	₹13 (1)	Promotion Campaign 84	08/02/2025	30/01/2025	Product C	-	-	-	a00dL000027buxA
	Subtotal								
	₹14 (1)	Promotion Campaign 10	03/02/2025	23/01/2025	Product C	-	-	-	a00dL000027buwY

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

2.Overdue Promotion Campagin Reminder

1.Create an Email Template

- Setup → Email → Classic Email Templates

2 . Create a Workflow Rule

- Setup → Workflow Rules → New Rule

SETUP

Classic Email Templates

Text Email Template

Smart Retail: Your Promotion is About to Expire"

Help for this Page

Preview your email template below.

Email Template Detail

Edit

Delete

Clone

Email Templates from Salesforce	Unfiled Public: Classic Email Templates		
Email Template Name	Smart Retail: Your Promotion is About to Expire"	Available For Use	<input type="checkbox"/>
Template Unique Name	Smart_Retail_Your_Promotion_is_About_to_Expire	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Tanvi Markad [Change]		
Description	"Reminder email for promotions about to expire"		
Created By	Tanvi Markad, 25/09/2025, 11:31 pm	Modified By	Tanvi Markad, 25/09/2025, 11:31 pm

Edit

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Subject

Your Smart Retail Promotion is About to Expire"

Plain Text Preview

Hello {Contact.FirstName},

Your promotion from Smart Retail is about to expire in 3 days!

Don't miss out—redeem your discount now.

Click here to view your promotions: {Insert Link}

Thank you!

SETUP

Workflow Rules

Workflow Rule

Promotion_Expiry_Reminder

Help for this Page

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

Edit

Clone

Deactivate

Rule Name	Promotion_Expiry_Reminder	Object	Promotion Campaign
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Sends an email reminder to customers when a promotion is about to expire		
Rule Criteria	CURRENT_USER.Email EQUALS TODAY() + 3		
Created By	Tanvi Markad, 25/09/2025, 11:35 pm	Modified By	Tanvi Markad, 26/09/2025, 6:25 am

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Email Alert	Promotion Expiry Reminder Email Alert

Time-Dependent Workflow Actions

See an example

You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

3. Add Workflow Action – Email Alert

Q workflow

Process Automation

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

Didn't find what you're looking for?

Try using Global Search.

SETUP

Email Alerts

Email Alert

Promotion Expiry Reminder Email Alert

Help for this Page

Rules Using This Email Alert (1) | Approval Processes Using This Email Alert (0) | Enrollment Processes Using This Email Alert (0)

Email Alert Detail

Edit

Delete

Clone

Description	Promotion Expiry Reminder Email Alert	Protected Component	<input checked="" type="checkbox"/>
Unique Name	Promotion_Expiry_Reminder_Email_Alert	Email Template	Scheduler Payments, Payment Reminder for Service Appointment Email
From Email Address	Current User's email address	Object	Promotion Campaign
Recipients	User: Tanvi Markad User: Integration User User: Security User User: Rahul Sharma User: Sneha Kulkarni		
Additional Emails	smartretail-test@gmail.com		
Created By	Tanvi Markad, 26/09/2025, 6:28 am	Modified By	Tanvi Markad, 26/09/2025, 6:28 am

Edit

Delete

Clone

Rules Using This Email Alert

Edit

Deactivate

Action	Rule Name	Description	Object	Active
Edit Deactivate	Promotion_Expiry_Reminder	Sends an email reminder to customers when a promotion is about to expire	Promotion Campaign	<input checked="" type="checkbox"/>

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help

This alert is currently not used by any approval processes

So This is for phase 7 now ready to go phase 8....