Process Automation in Salesforce

A

PROJECT REPORT

Submitted in partial fulfillment of the requirements for the award of the

degree of

BACHELOR OF TECHNOLOGY IN

COMPUTER SCIENCE &ENGINEERING

Under the supervision

of

Dr. Pardeep Kumar

(Associate Professor, SM-ACM-Department of CSE and IT)

by

Aditi Manglesh (161305)

JAYPEE UNIVERSITY OF INFORMATION TECHNOLOGY

WAKNAGHAT, SOLAN – 173234

HIMACHAL PRADESH, INDIA

JUNE-2019

Candidate's Declaration

I hereby declare that the work presented in this report entitled "**Process Automation in Salesforce**" in partial fulfillment of the requirements for the award of the degree of **Bachelor of Technology** in **Computer Science and Engineering/Information Technology** submitted in the department of **Computer Science & Engineering and Information Technology, Jaypee University of Information Technology Waknaghat** is an authentic record of our own work carried out over a period from 7th February 2020 to 10th May 2020 under the supervision of**Dr.Pardeep Kumar (Associate Professor, SM-ACM-Department of Computer Science & Engineering and InformationTechnology-JUIT**)and**Mr. ShibuKalidhasan (Salesforce trainer at Cognizant Technology Solutions ltd.)**.
The matter embodied in the report has not been submitted for the award of any other degree or diploma.

Aditi Manglesh, 161305

This is to certify that the above statement made by the candidate is true to the best of my knowledge.

Dr. Pardeep Kumar

Associate Professor, SM-ACM

Department of Computer Science & Engineering and Information

Technology Dated:

Acknowledgment

I would like to express my deep gratitude to my instructor from Cognizant Technology Solutions ltd**, Mr. ShibuKalidhasan**for giving me the opportunity to carry out this project. I would like to thank my project guide, **Dr.Pardeep Kumar** (Associate Professor, SM-ACM-Computer Science & Engineering and Information Technology-JUIT)- Computer Science & Engineering and Information Technology), for his patient guidance, enthusiastic encouragement and useful critiques of this project. I would like to thank him for his patient guidance, enthusiastic encouragement and useful critiques of this project.

I would also like to extend my thanks to my mentor and my friends fortheirconstantsupportand help throughout the finalyear.

Finally, I wish to thank my parents for their support and encouragement throughout my study.

Project Report Undertaking

I MissAditi Manglesh RollNo.: 161305Branch: Computer Science is doing my internship withCognizant fromFeburary 7, 2020 to June 5,2020.

As per procedure I have to submit my project report to the university related to my work that I have done during this internship.

I have compiled my project report. But due to COVID-19 situation my project mentor in the company is not able to sign my project report.

So I hereby declare that the project report is fully designed/developed by me and no part of the work is borrowed or purchased from any agency. And I'll produce a certificate/document of my internship completion with the company to TnP Cell whenever COVID-19 situation gets normal.

Signature_____

Name Aditi Manglesh

Date _____16-07-2020_____

Table of Content

List of Abbreviations

S.No.	Abbreviation	Definition
1	PAAS	Platform as a service
2	CRM	Customer relationship management
3	SAAS	Software as service
4	IAAS	Infrastructure as a service
5	SFDC	Salesforce developer console
6	MVC	Model view controller
7	UI	User Interface
8	HR	Human Resource

List of Figures

Abstract

What is Salesforce? The Answer is a CRM Software that is cloud based and which tends to quicken the trade relationships and has the power to change the operational existences of the group. Was created In the late 1990s by Marc Benioff and now it isreported as the most inventive organization for six back to back a very long time by Forbes Magazine. Not at all like regular CRM software and it is a network access. It can only be accessed by a sign-up and is signed in through a code and it is accessible on time. It depends on cloud processing, in which the customers, can get to the cloudwithout opeing any conventional software.

Salesforce gives numerous apparatuses to computerize your association's dreary business forms: Approvals, Process Builder, Workflow, and Flow Builder. Regardless of whether they're purchasing film tickets, taking care of tabs, or changing eatery reservations, if a customer is associating with an organization, they expect a consistent, customized understanding. Lightning Flow gives revelatory procedure computerization to each Salesforce application, experience, and entryway with two point-and-snap mechanization instruments: Process Builder and Flow Builder. Work process lets you robotize standard inner strategies and procedures to spare time over your organization. A work process rule is the fundamental holder for a lot of work process guidelines. These directions can generally be summarized in an in the event that/at that point explanation. A robotized activity is a reusable segment that plays out a type of activity in the background—like refreshing a field or sending an email. When you make a mechanized activity, add it to a procedure, achievement, or other robotized procedure.

Now what is an approval process?: it is a kind of business process that incorporates procedure too officially. Work is endorsed from various degrees of the association. It can incorporate financial plans, solicitations, venture plots, advertising activities, or whatever other things that need a progression of endorsements from various divisions.

An Approval Process is a computerized procedure executed to affirm records in Salesforce. It determines the means vital for endorsement, and permits a stage to apply to all records or just records that have certain qualities. A computerized procedure likewise determines who does the endorsing at each progression, and the moves to make when a record is affirmed, dismissed, or reviewed

Chapter – 1
INTRODUCTION

1.1 Introduction

What Salesforce is? It is the leader of cloud computing, providing solutions for any aspect of your enterprise, including CRM, sales, ERP, customer service, marketing, market analysis, moveable application development, and much more. What's more, all chips away from a specific client information point, Cloud computing is usually characterized as keeping everything away and dealing only with the data in the cloud.

What cloud computing has is that the applications made and executed on internet. The clients and the employees will always open the entire app therefore taking out the unpredictability and overhead of the keep up condition. Dissimilar to conventional business appsthat are confused, You can get expensive and necessary specialists to implement, run, update and secure cloud computing anywhere with an online association. The entire base will collaborate in the normal frameworks. Continuous help is required for this kind of continuous cooperation and for the smooth operation of the system.There is no need to bring cash into acquiring and funding hardware and technology structures, and instead raising the future expense of cloud storage to consumers and engineers. The major influence of cloud infrastructure is on the flexibility of the Information Technology systems. In this cloud computing environment, one can easily involve customers and engineers in a moment, so programs can be easily submitted to the cloud that eliminates the client's need for response time. As the unpredictability of the of the inside frameworks is expelled, the association can accelerate the whole process
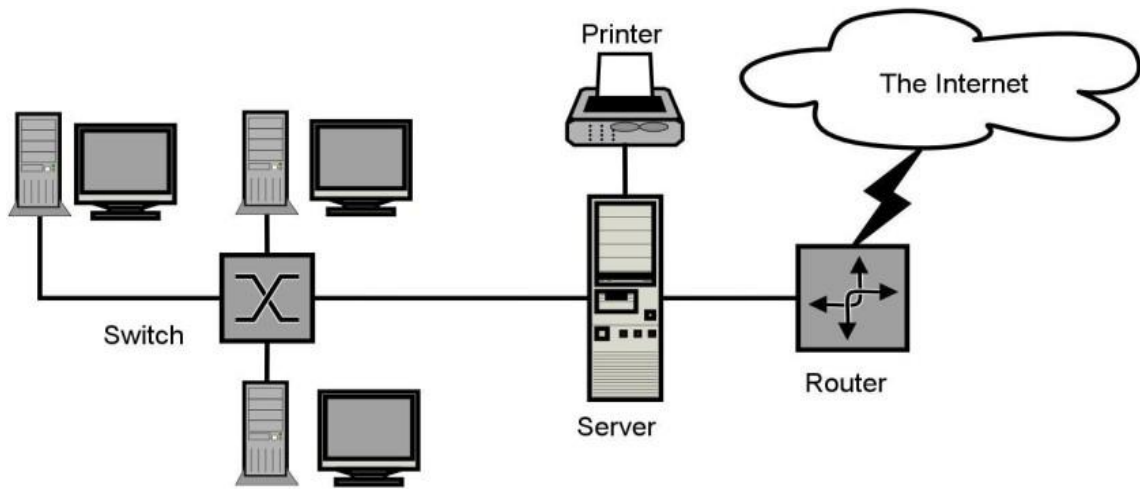
Basic Structure of Cloud Computing

1.2 What are Service Models?

In Software as a Service (SAAS) the app created by the distributer on a cloud framework can be given to the end client.Generated programs may be accessed from various client gadgets via interfaces such as a computer system or a software gui. Cloud foundation, servers, systems, stockpiling and work frameworks cannotbe not overseen nor can be constrained by the client Cloud application administrations speak to the expanding cloud showcase. Programming as an assistance uses the web to send the apps managed via the merchant and whose gui will have the option to access on the client side. A considerable lot of the applications created utilizing "Software as a Service" would run in on internet by utilizing some modules. There won't be need of any download or foundations. The significant applications which are created utilizing "System as service" are human services associated apps, customer relationship organizations, consolidate email, and cooperation. A portion in the exorbitant endeavors that can't considered as programming sellers began utilizing SaaS to get the high ground and increase salary.

In platform as a service (PAAS) The Customer can submit to the cloud platform built by the Customer by the aid of libraries, software, administrations and coding and processing dialects provided via the Customer. The basic basis of cloud and power, servers, organisation or operating systems cannot be controlled or limited by the User. Cloud stage administrations can be used for apps and their progressions when cloud portions are given to programming. Designers can have the option to pick the structure utilizing PaaS where the applications can be extended to make or alter. The sending of uses turnout to be simple and quick if the "platform as a service" is utilized

Endeavor "platform as a service" gives Self-management entryway for computer engineers to handle the software base from technology creation activities. Adaptation, software as an assistance enabler and multi-habitation is able to be accessed from apps utilizing platform as a service.The main coding factor will be minimized for "platform as a service" implementations and the framework will be modified to a half and a half model Infrastructure as a Service (IAAS) The user can manage networks, storage , servers and other critical computer services on which the consumer will execute and deliver specific software such as programs and operating systems.The secret cloud technology is not managed or tracked by the user, but instead can be managed by operating systems, data, servers and the net.
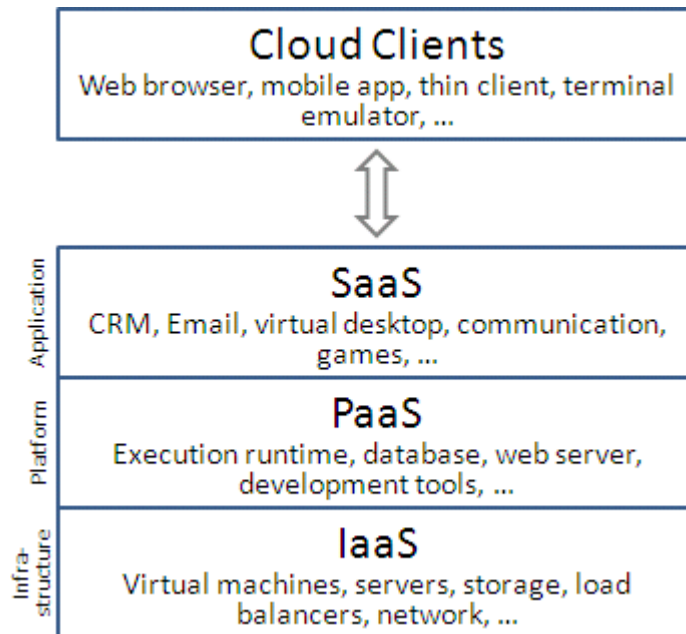
Service Modelin Cloud Computing
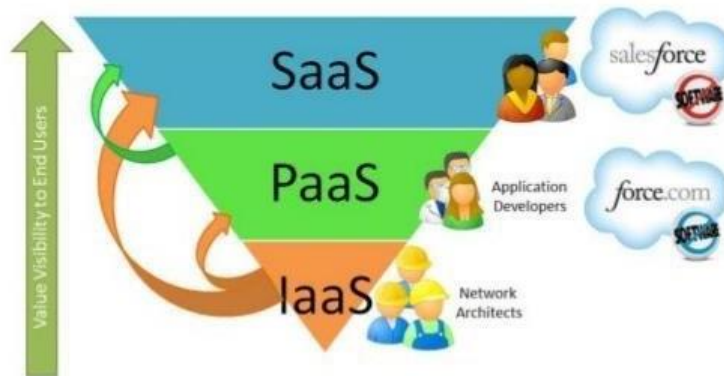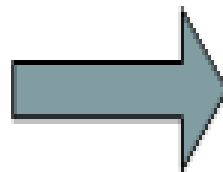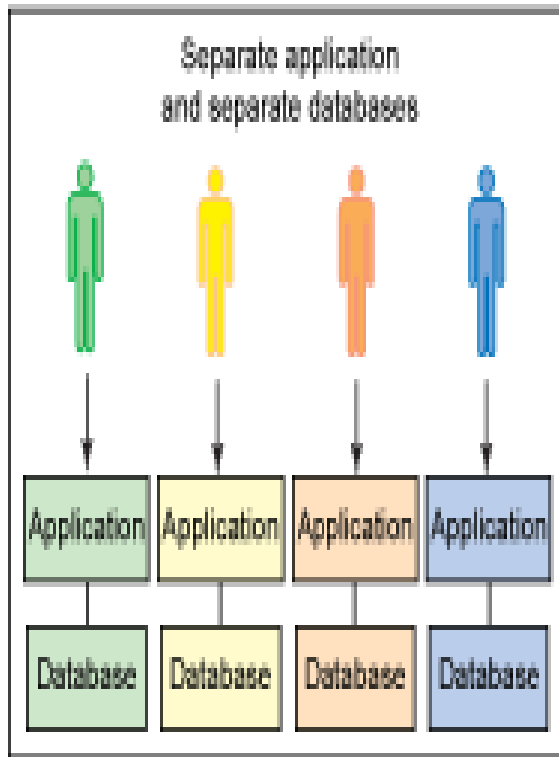

Service Model

Chapter–2

SALESFORCE

2.1 Introduction

It is themost demanded customer relationship management and comes in the list of globally known best cloud computing companies. Salesforce does not work on servers and doesn't even need hardware or a software installation. To access salesforce all we need is internet. This gives power to even the non technical staff to be able to operate the system, in order to fulfill their needs. Known as SFDC(Salesforce.com) and its customer relationship management software, it is split into separate sections such as cloud sales, cloud management, group platform, platform analytics, cloud info, cloud marketing, cloud applications, etc.
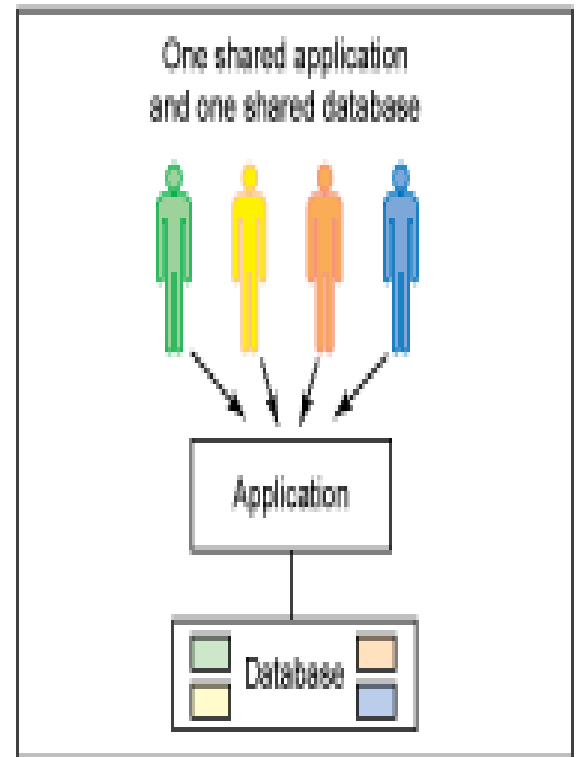
2.2 The Architecture ofSalesforce

The Architecture which Salesforce works on is multi-tenant. The cloud shares its resources safely and cost efficiently by using a technology called multi-tenant. It's similar to a bank service where a customer shares same infrastructure but yet hidden from other customers. A cloud uses multi-tenant architecture to share its assetswith safety among different applications and occupants (organizations, associations, and so on) that use the cloud. Some clouds also useVirtualization-based architectureto capture occupants,some use customsoftwarearchitecture for the business.

single-tenant

Separate application
and separate databases

Application	Application	Application	Application
Database	Database	Database	Database

multitenant

One shared application
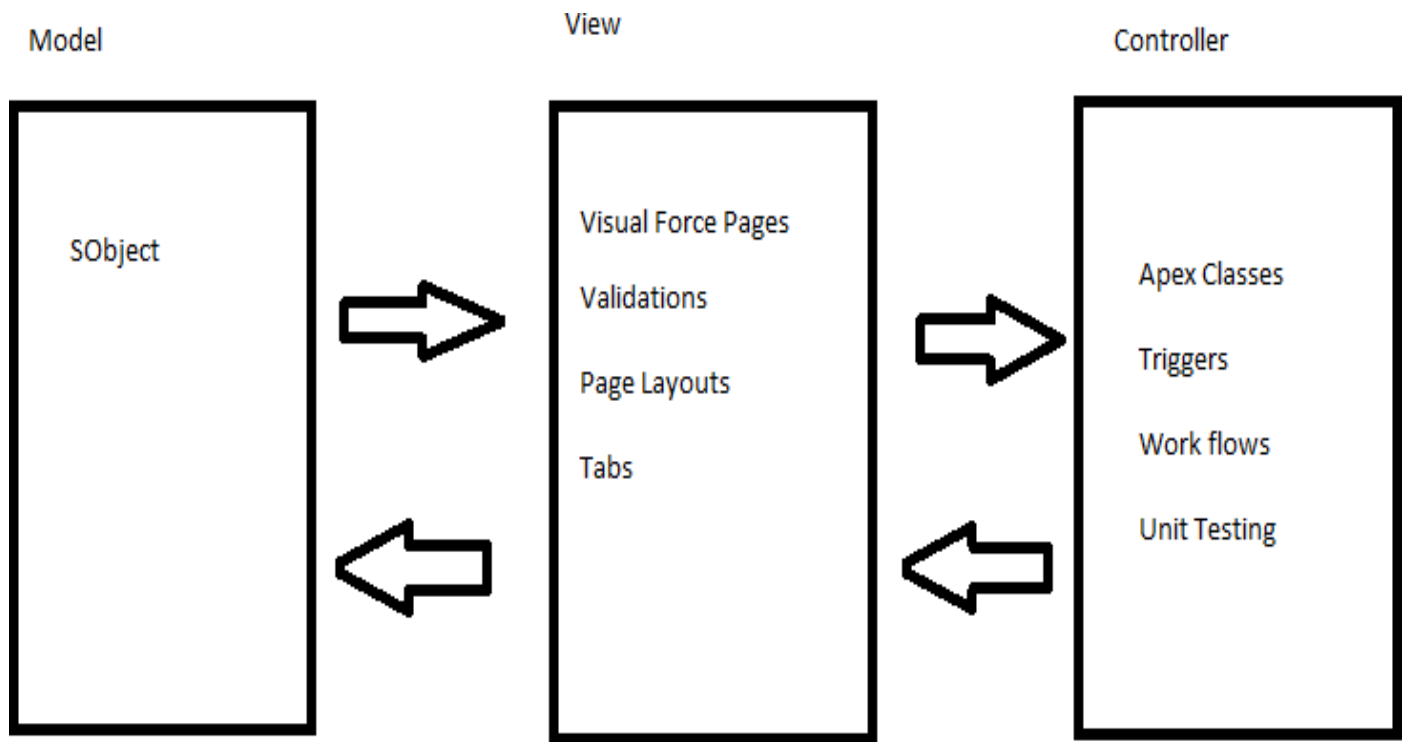and one shared database

Application

Database

Multi-Tenancy

2.3 Multiple View Controller(MVC)

Multiple View Controller iswhat keeps the business logic separate from gui logic that is, it distinguishes the bit which user sees with what code is written to implement that bit.In Salesforce one can make View pages arelike JSP, it can be written in sfdc visual force pages. Increasing page of the visual force (VF) is associated with the device. We will compose the controller to the APEX lagoon. In SFDC, the controller component consists of workflows, prompts, apex groups and a model layer consisting of fields, interactions, artifacts and a display layer consisting of menus, window views, VF files. Model, View and Controller are the three central MVC units.

➢ Model- we describe here the schema and information used by Salesforce for object representation and Objects as a guide, since each entity is mapped to a particular topic in Salesforce.

➢ View: We reflect how data, format and visual force are used to convey data to users.

➢ Controller: We use buttons and system behaviors to execute activities while the user communicates with visual powers.

Model

View

Controller

SObject

Visual Force Pages

Validations

Page Layouts

Tabs

Apex Classes

Triggers

Work flows

Unit Testing

MVC in Salesforce

2.4 Salesforce's Editions

Depending on business needs this offers different functionalities such as:-.

➢ Professional Edition: gives complete CRMfunctionalities.

➢ Enterprise Edition: combined with functionalities of Professionaledition this also gives highly developed CRM configuration and monitoring gear.

➢ UnlimitedEdition:theUnlimitedEditionProvides full smartphone connectivity, prime support and limitless personalized applications.

➢ DeveloperEdition:It is for the developers to understand Salesforce better and integrate it with other application to develop new applications.

.

2.5 Overview ofSystem andTechnologies

SFDC permits managers to design and organize structures for diverse use. Salesforce enters the strength of configuration and design development in its base for example Power PlatformThis stage company can use unique coding, work method guidelines, approval protocols to conduct their market reasoning and can integrate details from specific programs, generate reports and undertake a analysis within no time. The Salesforce CRM model is used in marketing partnerships such as notifications, events , business incentives and, in turn, for rewards such as discounts, promotions and assistance.

We will operate by Force.com, a portable company using the Salesforce1 program. We can create and streamline lightweight applications using HTML 5 and UI frameworks and support all devices with a single code base. Salesforce1 mobile program can be launched from the App Store or from Google Play on a cell phone.

Salesforce now provides an AppExchange corporate technology hub in which we can find pre - assembled market software. AppExchange provides a vast range of verified applications that have been developed by anyone or we may create up our own framework and sell it here. It's much like the App Store as well as the Google Store. Thanks to its easy entry, simplicity, limited authorization / restrictive problems, and per consumer expense, Salesforce is transforming into a force platform from small to large-scale projects.

2.5.1 SFDCApex

Apex is the programming language of SFDC. It is a case-inhuman, mainly written text, structured programming language with identical java punctuation with a wavy segment and a dab paper sentence form. Zenith is used to manage Force.com programs and techniques, such as entering, capturing, tracking, etc. with dynamic power design controls.

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Sent-email notifications
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Chrome extension
Webinars and live trainings

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Opportunity tracking
Lead management
Task and event tracking
Customizable reports and dashboards
Mobile access and administration
Chatter – company social network
Outlook Side Panel and sync
Role permissions
Case management
Campaigns**
Quotes and orders**
Collaborative forecasts**
Mass email**
Sales Data***
Sales Cloud Engage***

Enterprise

MOST POPULAR

Deeply customizable CRM for your business

TRY FOR FREE

Get all Professional features PLUS

Workflow automation
Enterprise territory management
Profiles and page layouts
Custom app development
Integration via web service API
Salesforce Identity
Salesforce Private AppExchange
Report history tracking**
Approval automation**
Sales Data***
Sales Cloud Engage***

Unlimited

Unlimited CRM power and support

TRY FOR FREE

Get all Enterprise features PLUS

Unlimited customizations
Unlimited custom apps
Multiple sandboxes
Additional data storage
24/7 toll-free support
Access to 100+ admin services
Unlimited online training
Sales Data***
Sales Cloud Engage***

2.5.2 SFDC Visualforce

Visualforce (VF) is a Force.com stage framework with a tag-based mark - up language that can not be differentiated from HTML. Only with support of Visualforce, design templates can be rendered for flexible apps and workspaces with both the aid of many other of many other-end technologies such as HTML.Also with Visualforce model and the Design Controller details, we can create our own market justification in Apex.

2.6 SFDC Lighting

What Lightning is? It is a segment-driven framework for just a scalable Salesforceprogram that is focused on a free software Aura model. Only with lighting system, sensitive systems can be built with no issues. Apps applied to the Lighting device are offered or approved on AppExchange..

Lightning Software Creator for Salesforce is an important method for the advancement of intuitive user gui. This gui finds the individual displays to be produced by lightning particles. Models could be such as structures for documents or different programs.

For Salesforce it is a tool for effective implementation of modern web interfaces. This design takes into account the distinctive displays to be mounted in the lightning parts. This may be templates for documents types or different applications.

2.7Benefits of Salesforceusage

1) Put resources into advancement, not framework With Salesforce, we can focus on business rather than rear end, as Salesforce introduces additional features and scheduled alerts 3 times per year. These limited workloads have decided to make Salesforce been one Forbes' another very successful companies.

2) Data Security is nothing to be stressed about.

Application Services

Manage password policies, app and data access, and field-level security.

Network Services

Control access with built-in HTTPS, authentication, and network security controls.

Infrastructure Services

Run apps securely, with automatic scalability, backup, and recovery.

3) Salesforce should be made to work in a manner in which we need Salesforce could be deeply tweaked to be increasingly nimble and profitable and the applications can be created with interfaces with point and snap to top of the line stages.

4) Find out more about Prebuilt apps with AppExchange in mins. With sector-explicit third party apps, Salesforce can indeed be distributed per each tier and organisation. Such programs are developed by a huge number of people and are reviewed by thousands. So, with confidence in apps, we could focus on increasing the market.

5) Operating at a single stage where everyone works closely with Salesforce APIs, core technologies and external software, we could access and track details on every platform or venue. Salesforce tends to work on windows pc, smart phones, and iPad

Salesforce also have

Sales Cloud
Sales force automation and CRM
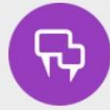
Service Cloud
Customer service and help desk software

Marketing Cloud
Digital marketing platform

Community Cloud
Community collaboration software

Wave Analytics
Business intelligence software

App Cloud
Cloud application development platform

IoT Cloud
Connected device platform

Commerce Cloud
Commerce, POS, and order management

Sales force's Benefits

Chapter – 3
APPROVAL PROCESS

3.1 ProblemStatement

What ia an approval process:It is a sort of corporate procedure that involves measures very officially. Authorize research at all layers of the company. The work should include expenditures, invoices, project highlights, advertising strategies, or any other items that require a sequence of approval processes from multiple departments.

3.2 Normal Approval Process

1. Submission documents -

Submission papers can be something that needs to be accepted, whether it is an invoice, a sales quotation or some other internal paper.

2. Approvers-

Those who approve are the people who determine whether the documents submitted should be accepted or rejected. If your process has different approval levels, then it is important to determine who needs to approve the papers first.

3. Permissionlevels-

To retain protection in the company, it is important to establish specific approval thresholds for each user so that you can verify who can access, delete, deny or accept the submitted documents.

4. Logs-

Able to record every phase of the approval process is as necessary not just to preserve accountability within the company, as well as to monitor and document certain activities throughout the event of a inconsistency.

3.3 Designing ApprovalProcess

It is important not only to ensure transparency within the organization, but also to track and log those actions in the event of confusion, to be able to report any step of the approval process. The value of pre-planning can not be understated, because this fundamental concept provides a foundation around which you can construct an internal approval procedure. (if we use the word reasoning here, we really aren't relating to market theory, which is part of the product system that encrypts real-world business principles for how processes can operate. Instead, we say the abstract reasoning that will drive the layout of the approval processes that you are designing.) There are a variety of issues that can direct the structural design:

3.3.1 How are demands to be decided to submit? Have to choose to describe their experiences, such as when, how / where (e.g. , an online structure or entry), to whom, and what to remember for the underlying proposal..

3.3.2 What kind of documentation would it be a good idea for you to incorporate? Choose whether any praising data are available to be part of the first accommodation, or whether editors and approvers are required to submit paperwork in addition to their approval or dismissal. Provided that this is accurate, insure that the commodity stage will improve the record of stocking up.

3.3.3 How many means are there, and what right? The decisions you make right now are the food of ones structural process. Here you take the paths from the beginning of the accommodation to the unanimous decision or dismissal. For each stage, define the standards that are required for housing to proceed to the next step..

3.3.4 Favors are progressed by whom? Approvers recognized for each phase.

3.3.5 One should change the entries, and in which steps? In the event that your procedure requires changes at particular phases, who might change the accommodation (for example, the first submitter, the assigned proofreader, or the approver)? When you believe who is liable for modification, you can modify your list.

3.3.6   Accordingly, under what rules should requests be confirmed or rejected? There may be instances when a scheduled approval or denunciation is permissible. Be sure you define certain criteria in your reasoning so that you can add them to the system as you create the decision..

How many activities do you have when an application is approved or rejected? The clearance mechanism does not occur in a facility, but understand whether it is connected with the implementation phase whether the lodging is accepted or denied. Consider attaching alerts to launch an undertaking or to take out the preceding lodging.

3.4 Flow Diagram
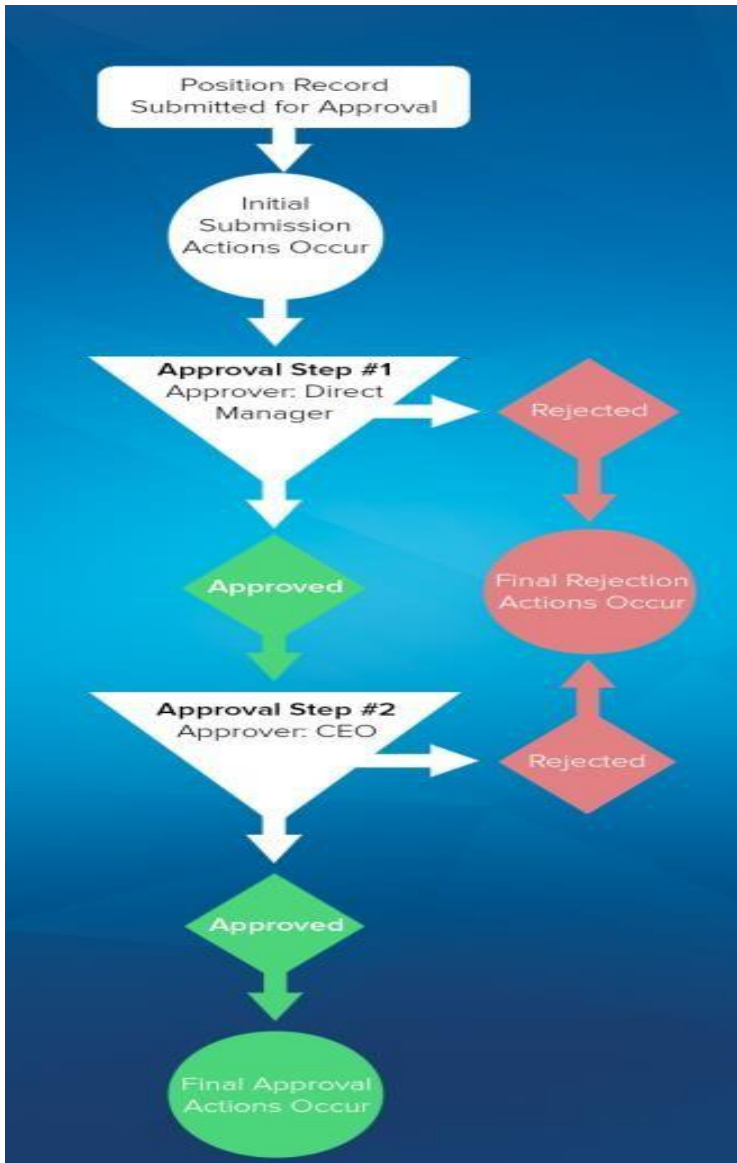
Chapter – 4 PROPOSED SOLUTION

4.1 The Solution

Designing an approval process in Salesforce can be the solution for the problem mentioned above. The solution that I came up with is that for an opportunity if the discount percentage is less than fifteen percent then the system will auto approve it and if it is greater than fifteen percent, the manager of the opportunity owner will approve it.
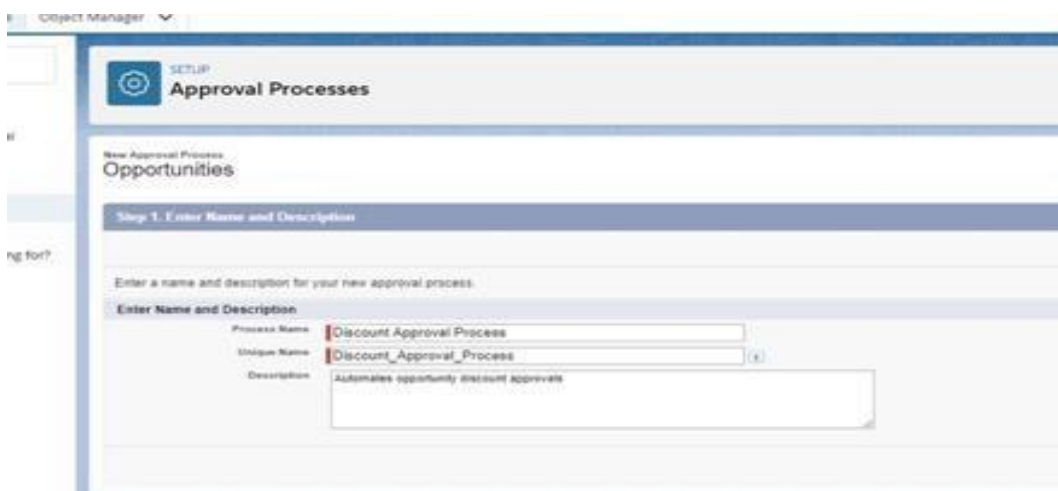
Steps for the Approval Process

Step 1 - Create an Approval Process

1.1 –Go to Setup; in quick find box enter Approval Process, for the options below select Approval process.

1.2 –Select opportunity from the options for picklist.

1.3 - Fll in the new approval process details by Selecting Use Standard Setup Wizard from the Create New Approval Process picklist,

1.4-selectcriteria are met, then fill in thecriteria
afterClickingNextandIntheUsethisapprovalprocessifthefollowingdropdown
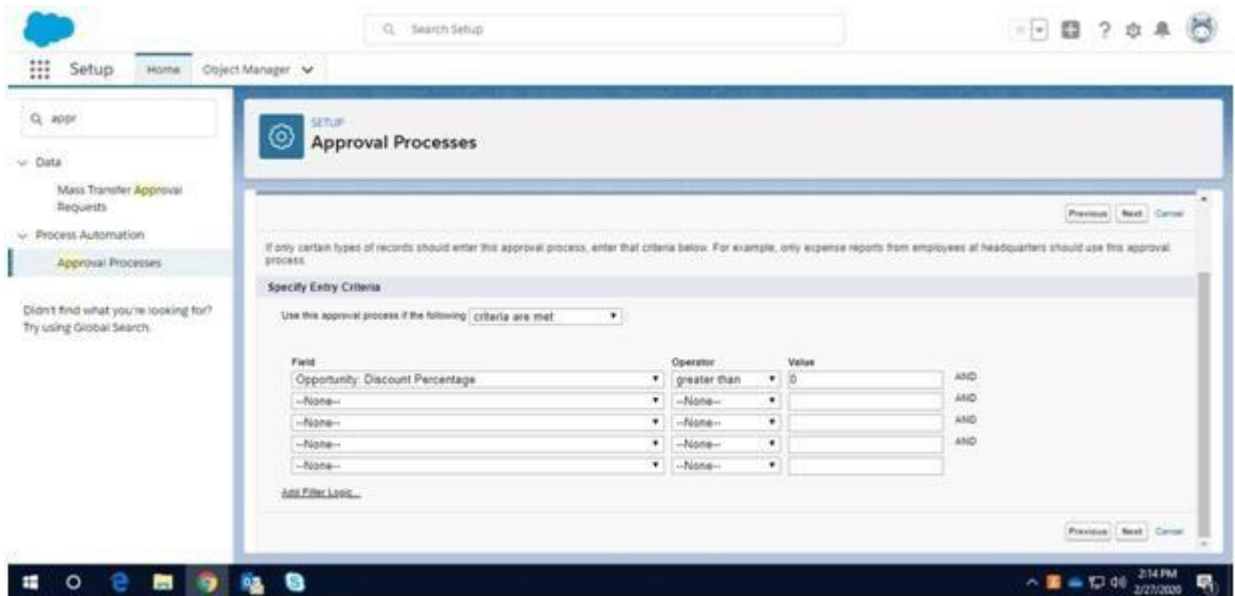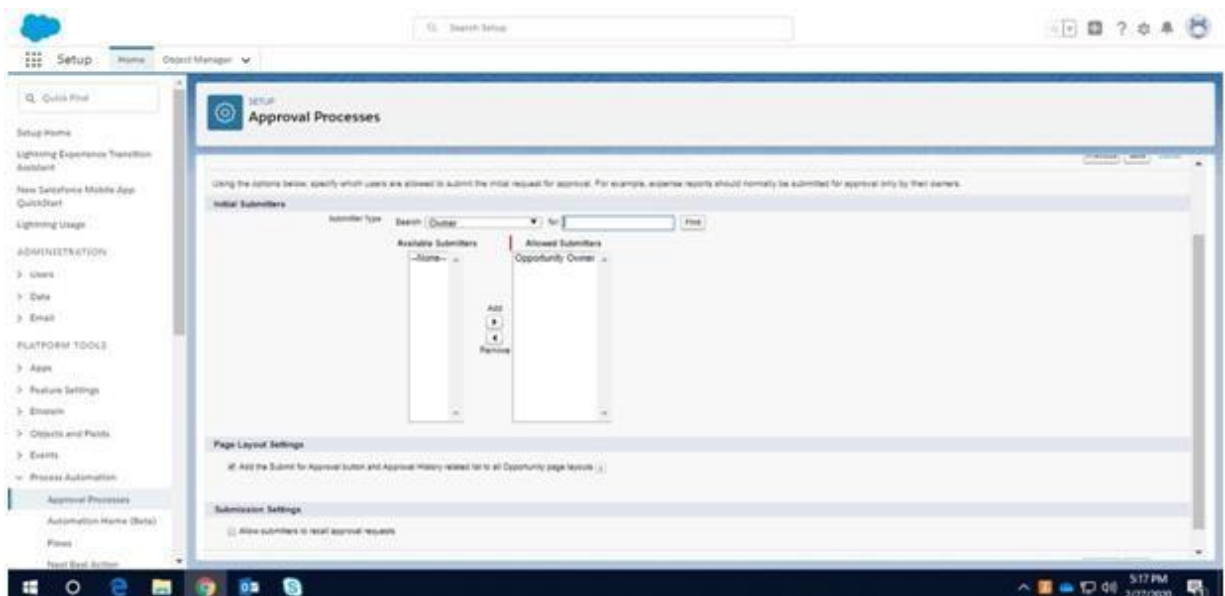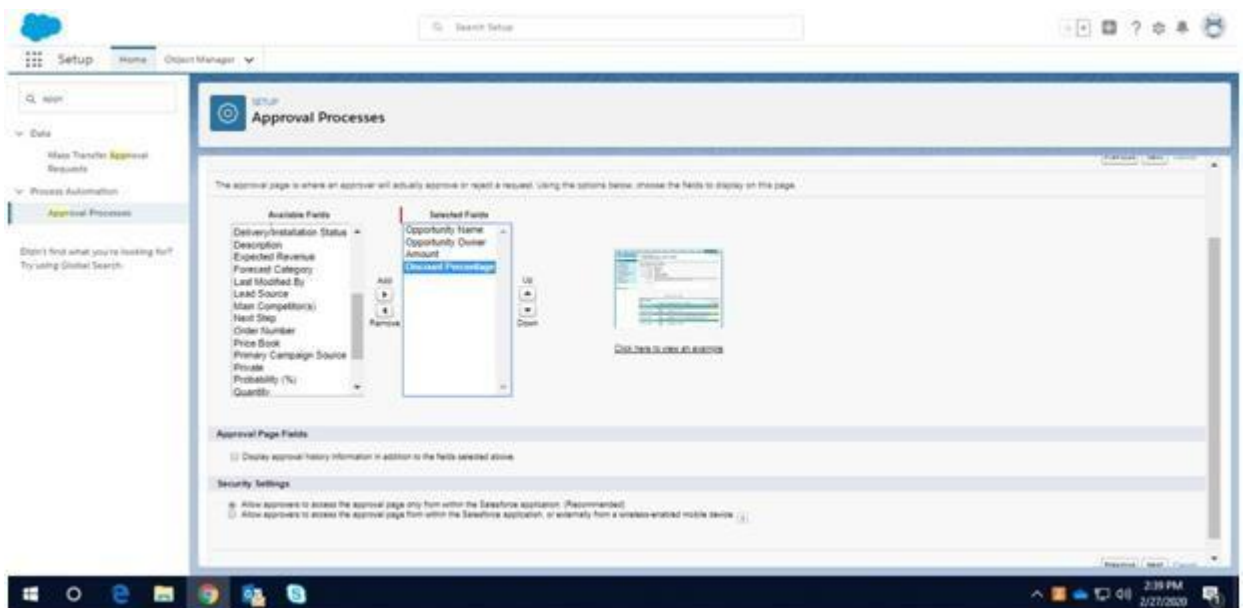

1.5 - Complete the approver field and record editability properties with the values give after clicking next.
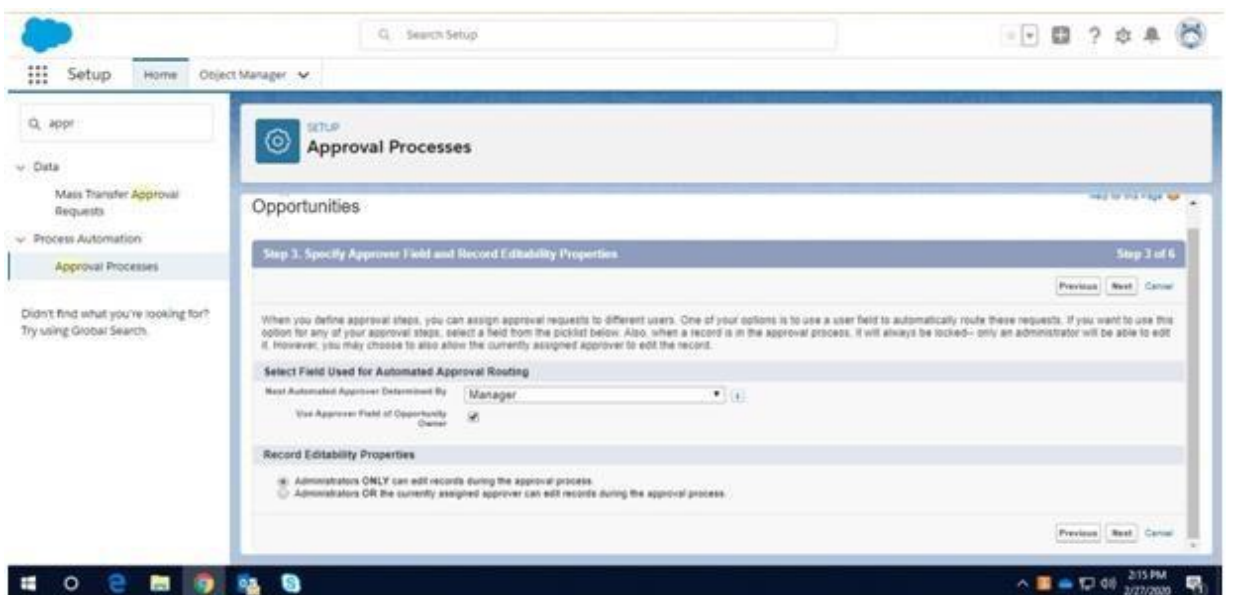
1.6 –After clicking on next while on the next step let the Approval Assignment Email Template field be blank.

**1.7** –After clicking nextsee if the fields that will be shown on the approval request page are correct:

1.8 –Then click on next, and then by completing the submitter detailstate the primary submitter

1.9-On clicking Save in the next "On the What Would You Like To Do Now?" Page, choose I'll "do this later, take me to the approval process detail page to review what I've just created". After all this is done. Select go!
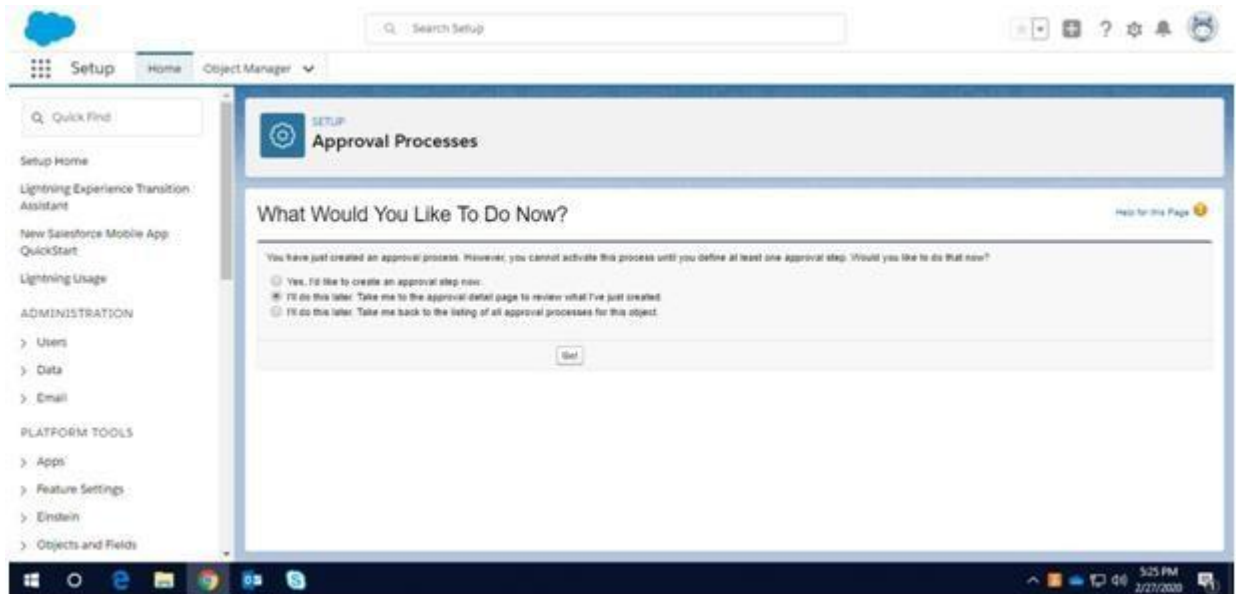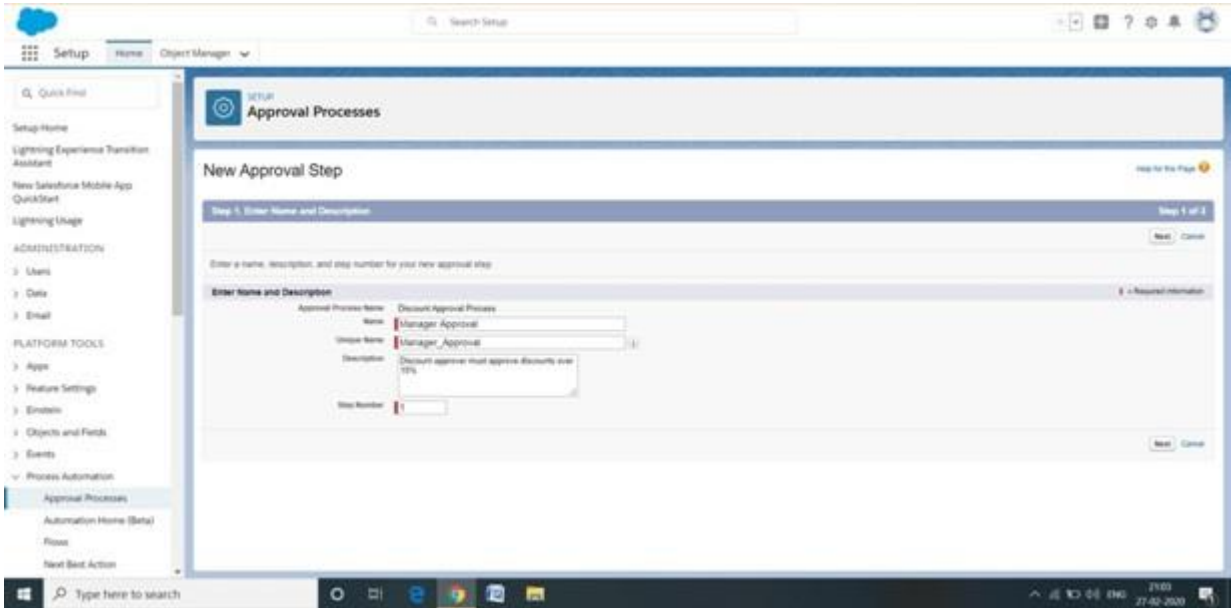

Step 2 - Initial Submission ActionsCreation

Step 2.1 - In the section of Add New picklist in the Initial Submission Actions, choose Field Update nowwith the following values complete the field update details and select save:
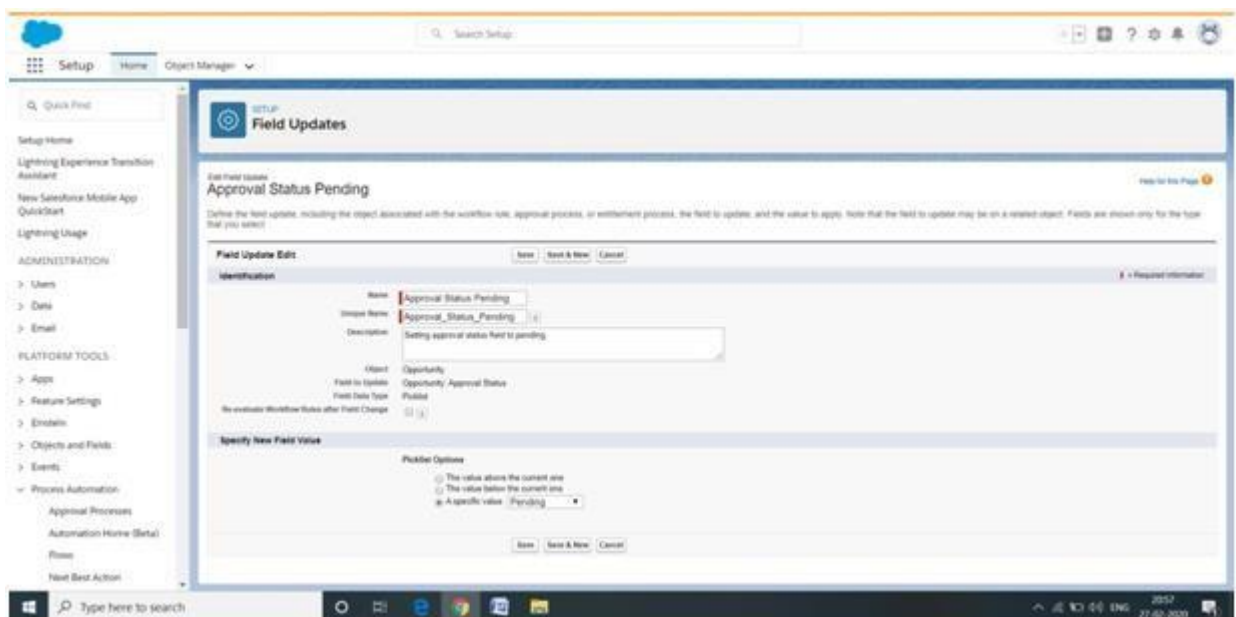
2.2 – Next step is the creation of approval steps. Complete the details of the first approval step after Clicking New Approval Step:


2.3 –Select Next. Select the radio button that says Enter this step if the followingand select criteria are met, then next to else select approve record then fill all these details:
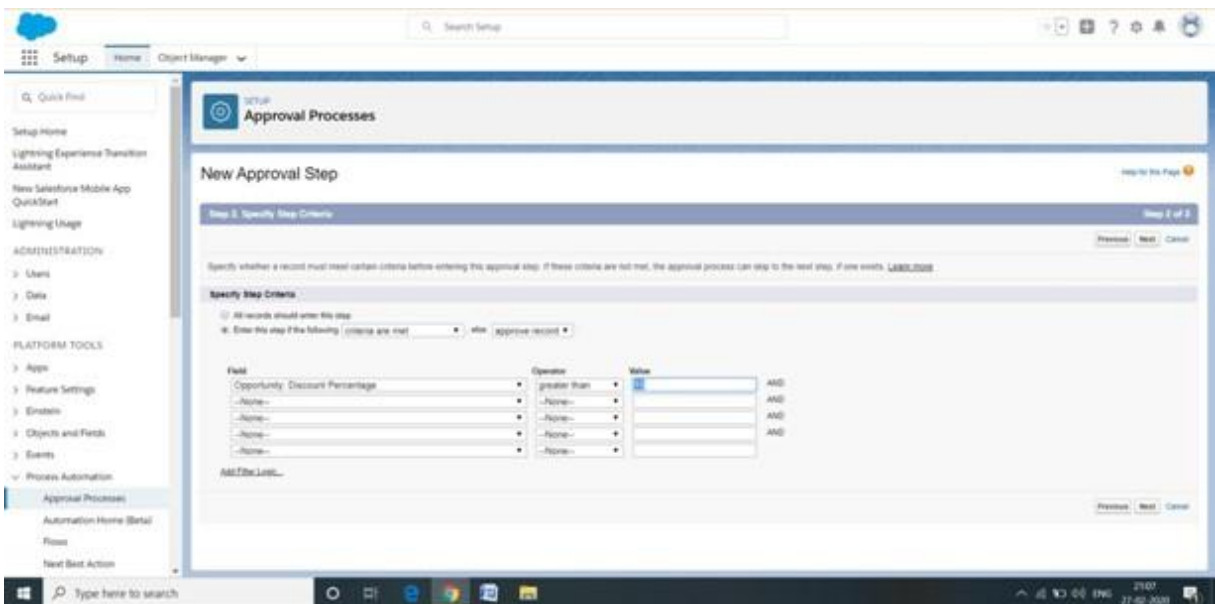
**2.4** –Select Next, then complete the assigned approver information and click Save.
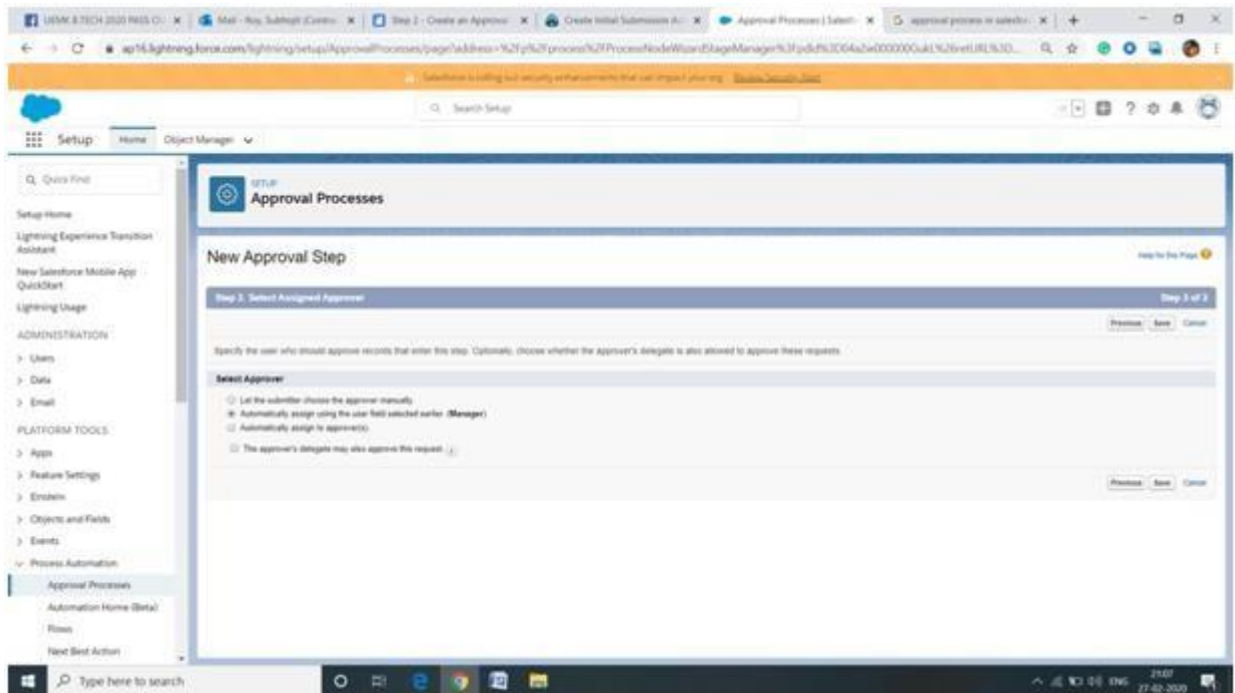
2.5 - On the Page which says What Would You Like To Do Now? click No, I'll do this later, take me to the approval process detail page to review what I've just created and Select Go!
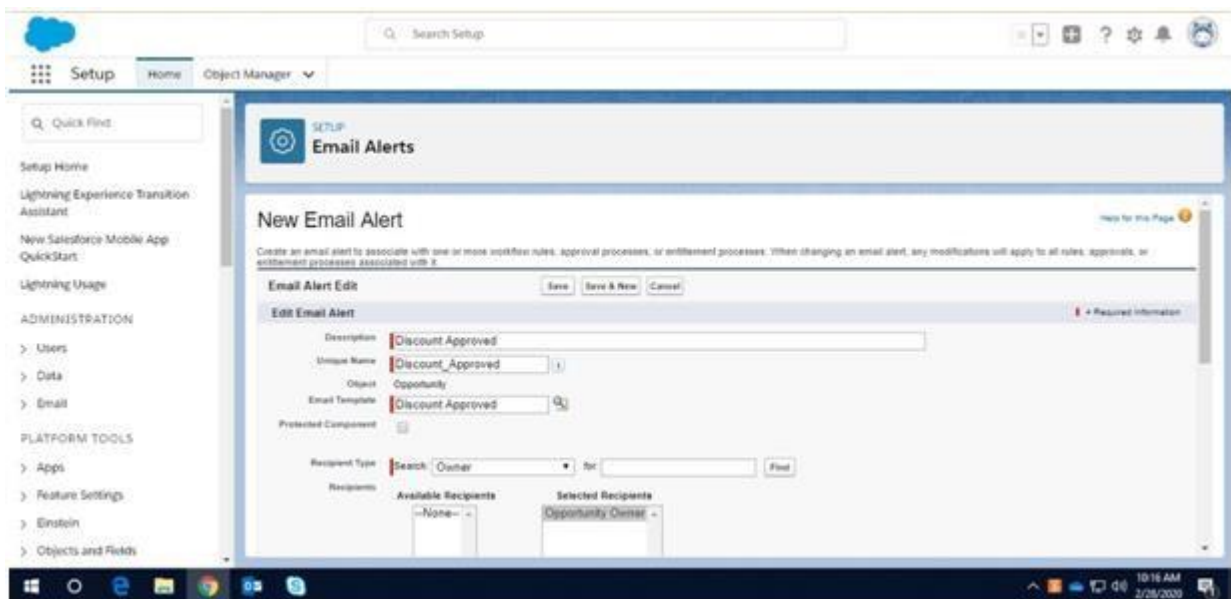
.
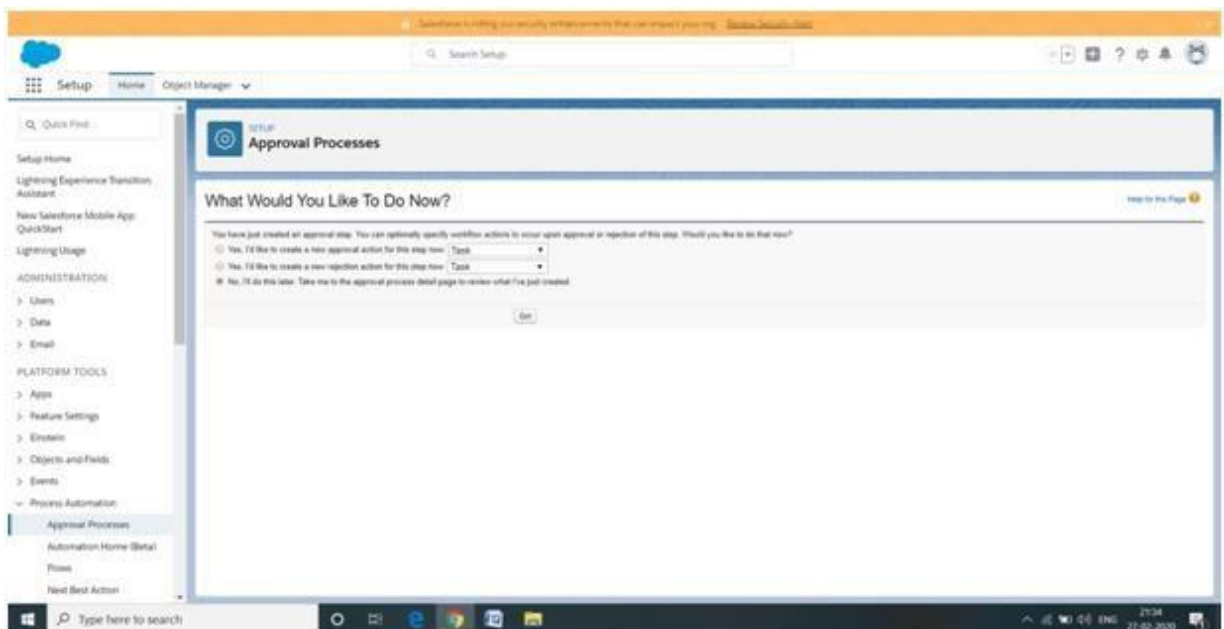
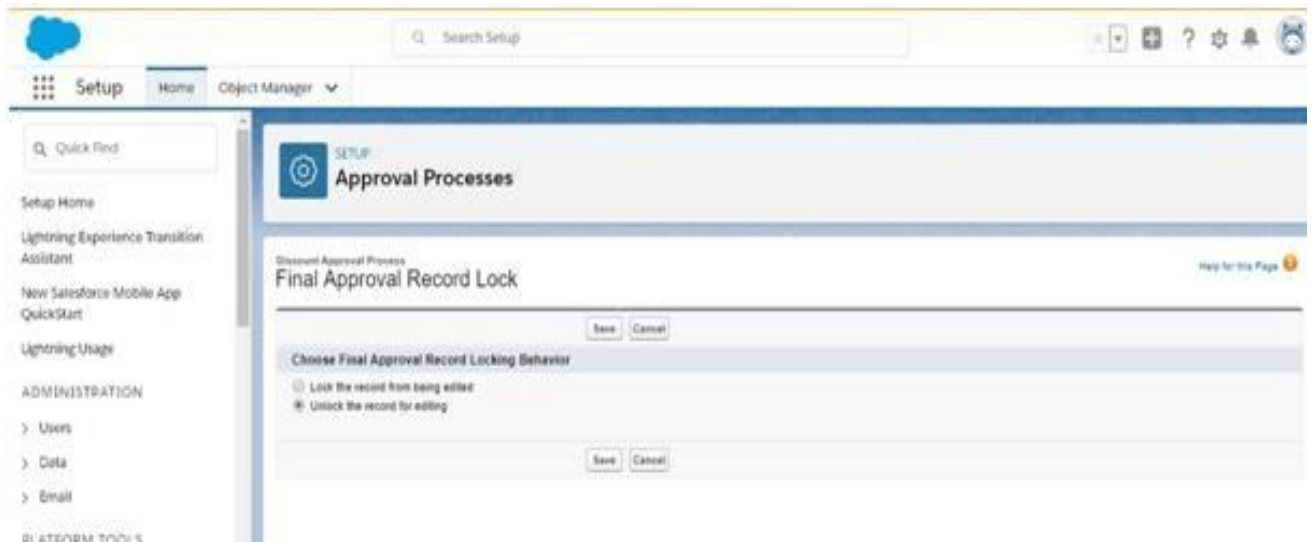**Step 3** - Approval Actions are needed to be set. Set those

3.1 - In the Final Approval Actions list, select Add New, then click Field Update and complete the field update details with these values and click save:
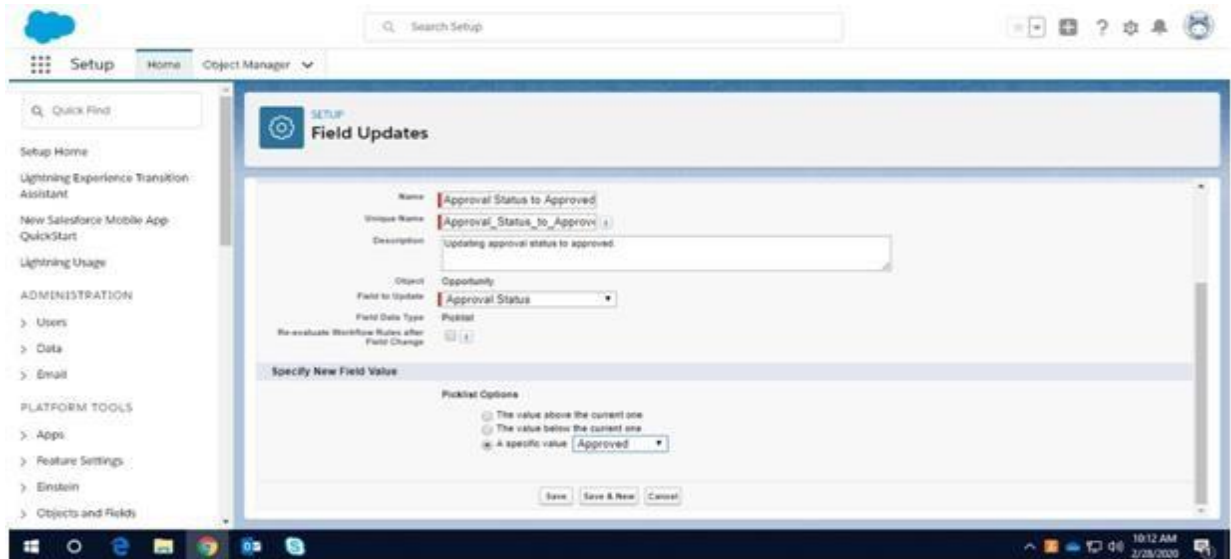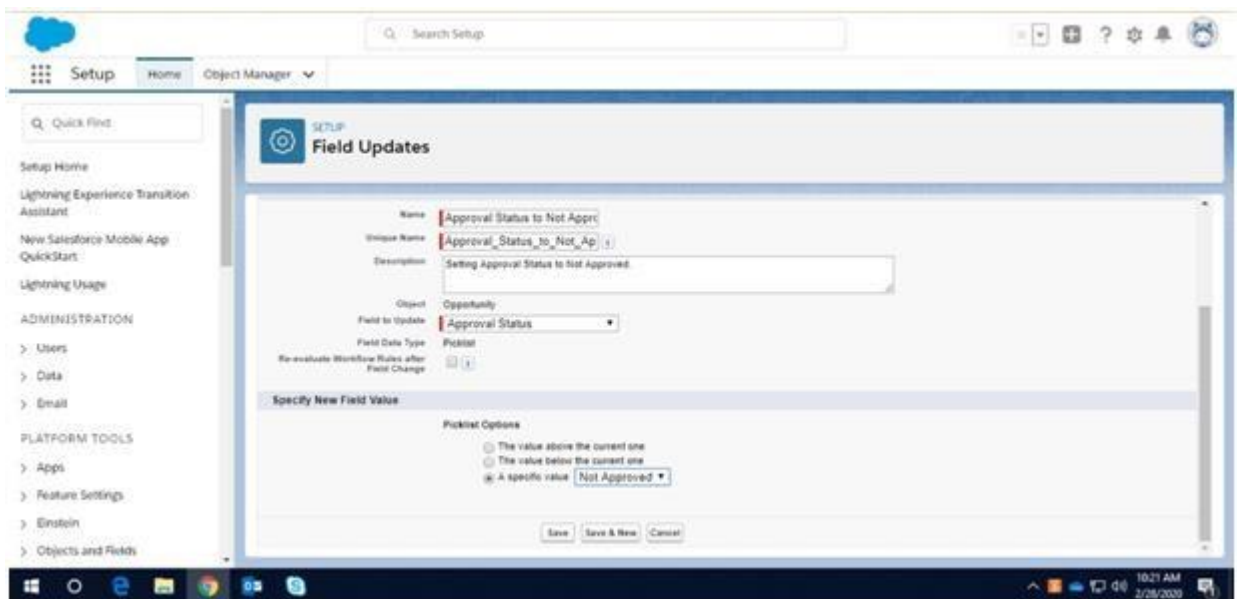

3.2-IntheFinalApprovalActionslist,clickAddNew,thenclickEmailAlertandcomplete the email alert details and selectsave:

3.3 - In the Final Approval Actions section, click Edit next to Record Lock and the select Unlock the record for editing and click save.

3.4 - In the Final Rejection Actions list, click Add New, then click Field Update and complete the field update details:

3.5 - select Save & New and complete the new rejection action details and click save:

Step 3.6 - Click Add Newin the Final Rejection Actions section, then select Email Alert and complete the email alert details and click save:
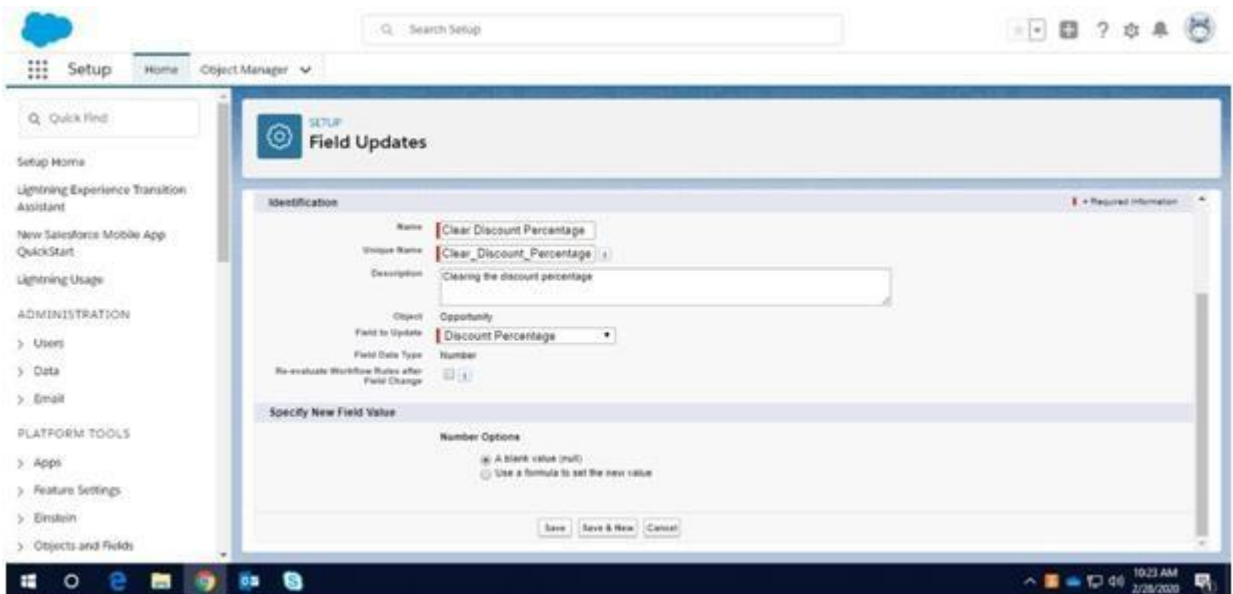
Step 3.7 - In the Final Approval Actions section, select Edit next to Record Lock and the select Unlock the record for editing and select save.
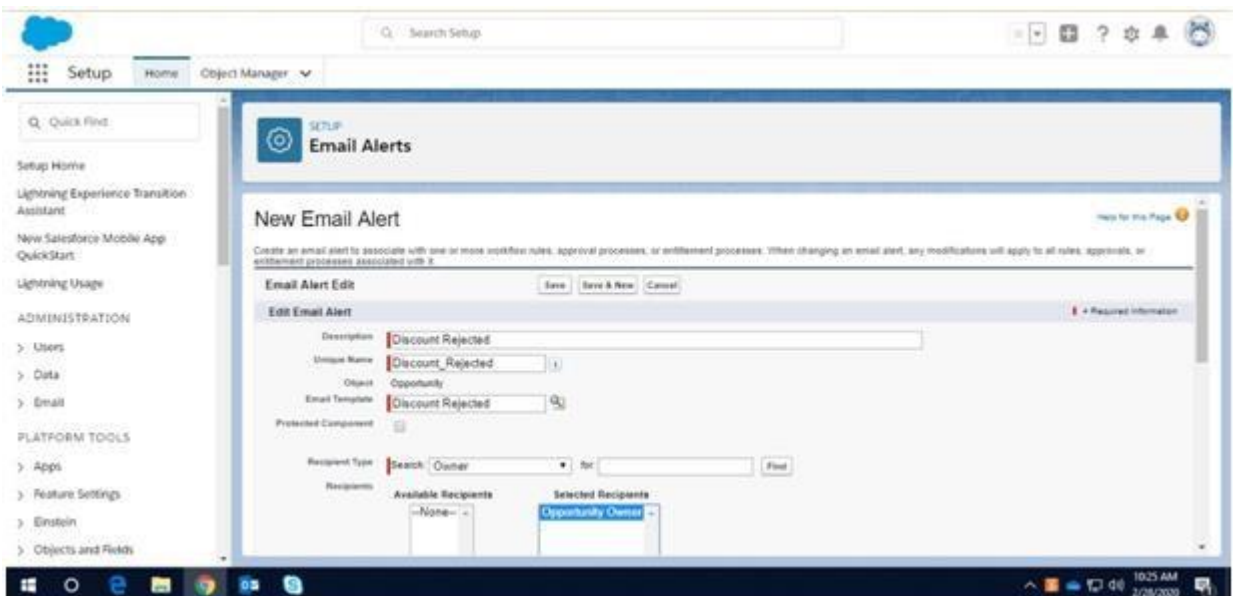

3.8 - Confirm the activation by selecting Activate and then Select OK

Chapter – 5
CONCLUSIONS

5.1Conclusion

I have constructed an aproval procedure where a specific markdown whenever exacted on a chance and is auto affirmed if the rebate requested is not exactly or equivalent than fifteen percent.On the opposite on the off chance that the markdown is over fifteen percent, at that point an endorsement from the chief of the open door proprietor is required to approve the buy. The administrator has the power to either support, dismiss or reassign it to another person dependent on the business needs.

This sets aside time and furthermore brings down chief obstruction except if vital for example 15% markdown for this situation. Besides cases which require administrator obstruction are given to the supervisor of the open door proprietor in order to forestall business misfortunes.

More highlights can be added to the venture thus as to expand its usefulness, however this is an essential diagram of how our endorsement procedure is construct and sent.

5.2 FutureScope

Futurescopeofapprovalprocessisonlylimitedbyourimaginationandbusinesslogic.Wecan implement the same feature of salesforce in more complex and diverse business scenarios. ScenariosmaybeincludedinanybusinesslinebeitB2BorB2C,smallscalebusinesstoMNC enterprises.

WecanextendtheapprovalprocessoutsideofsalesforcebyconnectingwithotherPaaSorSaaS   with the help of API and manage approvals from around the globe with the click of a single button. We can more use "approval process with spreadsheet" to build more powerful business applications.

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