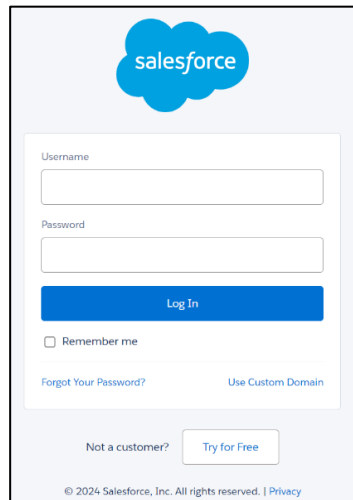


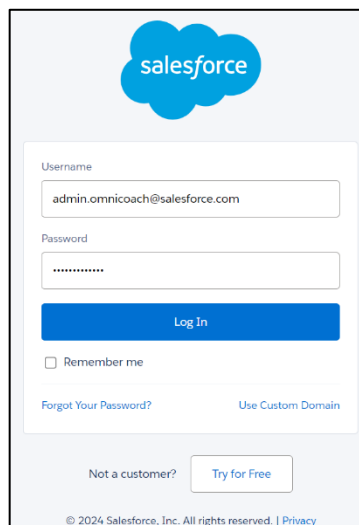
OmniCoach: User Guide

1. User navigates to the Salesforce Org Website: <https://login.salesforce.com/?locale=in>
2. Upon clicking on the above link, the user is taken to the login page



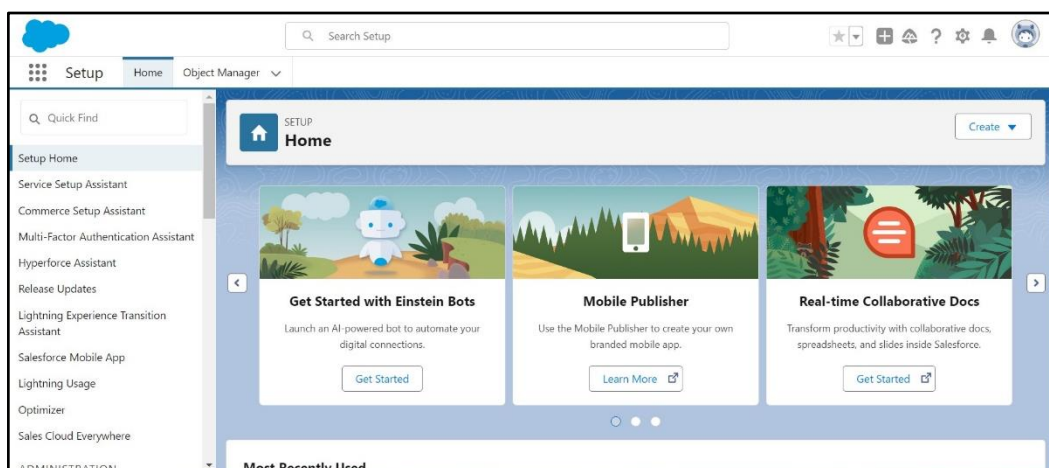
The image shows the Salesforce login page. At the top is the Salesforce logo. Below it is a form with fields for 'Username' and 'Password'. A blue 'Log In' button is positioned below the password field. There is a checkbox for 'Remember me' and links for 'Forgot Your Password?' and 'Use Custom Domain'. At the bottom, there is a link for 'Not a customer?' and a 'Try for Free' button. The footer contains the copyright notice '© 2024 Salesforce, Inc. All rights reserved. | Privacy'.

3. The user enters the Admin credentials and clicks on Log In

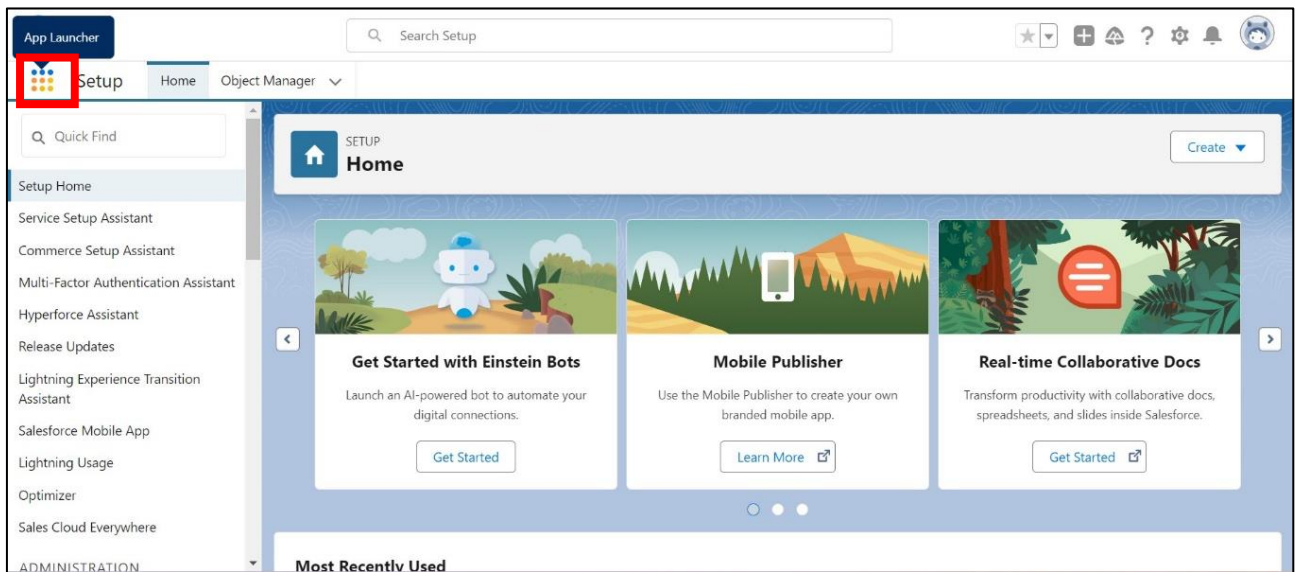


The image shows the Salesforce login page with admin credentials entered. The 'Username' field contains 'admin.omnicoach@salesforce.com' and the 'Password' field is filled with dots. The 'Log In' button is highlighted. The rest of the page, including the 'Remember me' checkbox, 'Forgot Your Password?' link, 'Use Custom Domain' link, 'Not a customer?' link, 'Try for Free' button, and the footer, remains the same as in the previous image.

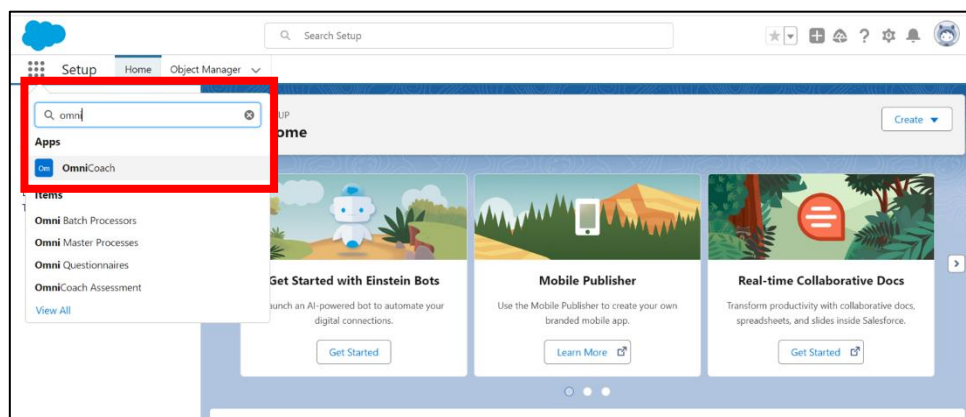
4. User lands on the Salesforce Org HomePage



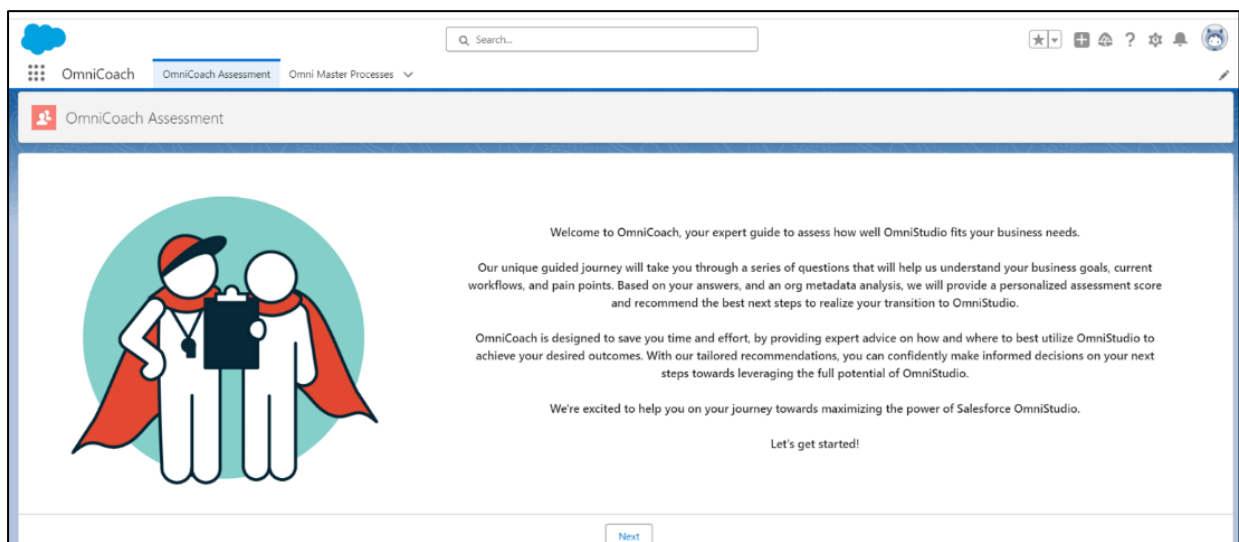
5. User clicks on the App Launcher Icon



6. User searches for the OmniCoach App

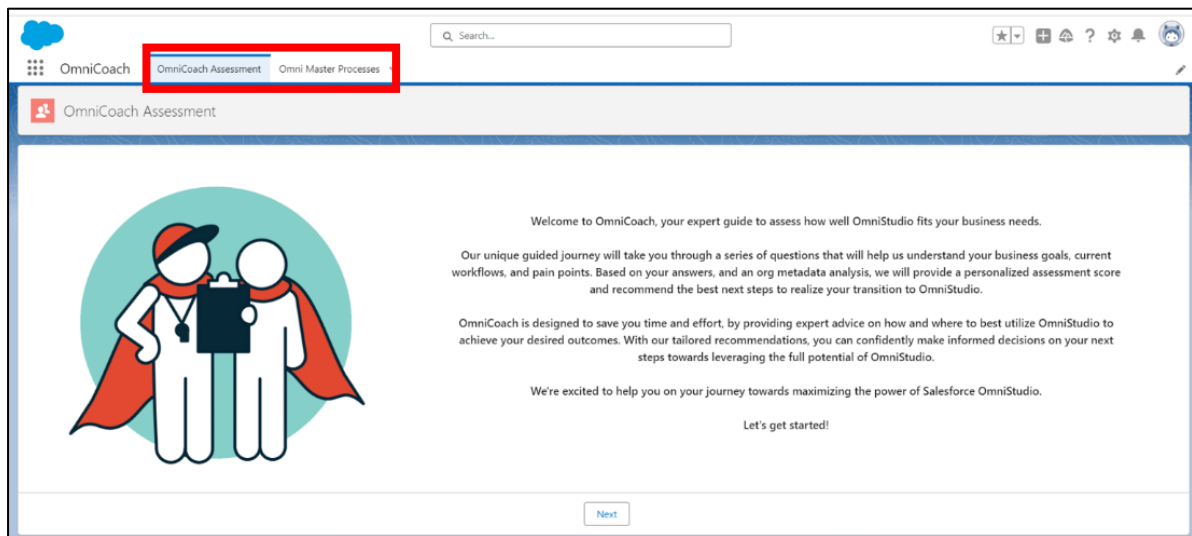


7. Upon clicking on the OmniCoach App, user can see the Application Landing Page as shown below:

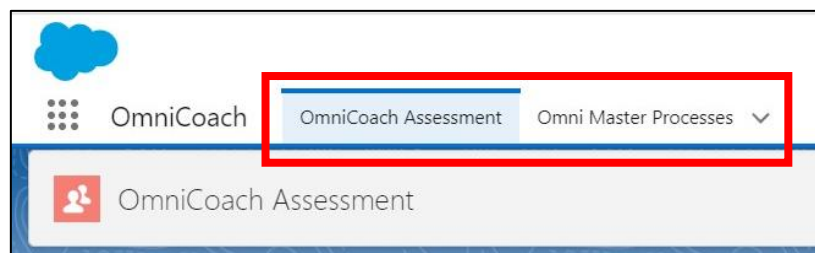


8. On the OmniCoach Landing Page, the user can see two Tabs:

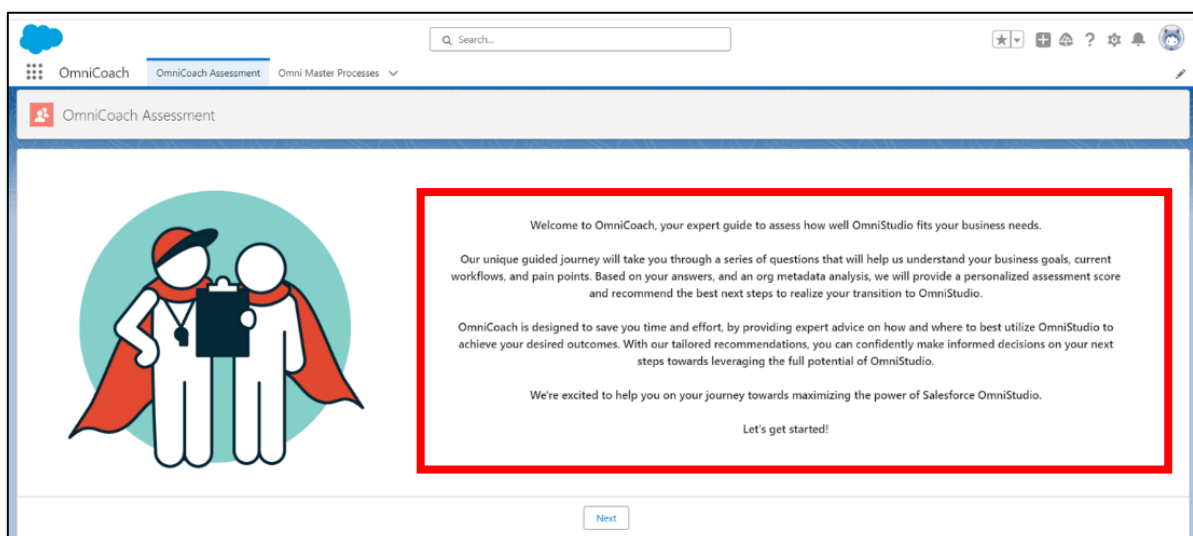
- OmniCoach Assessment
- Omni Master Processes



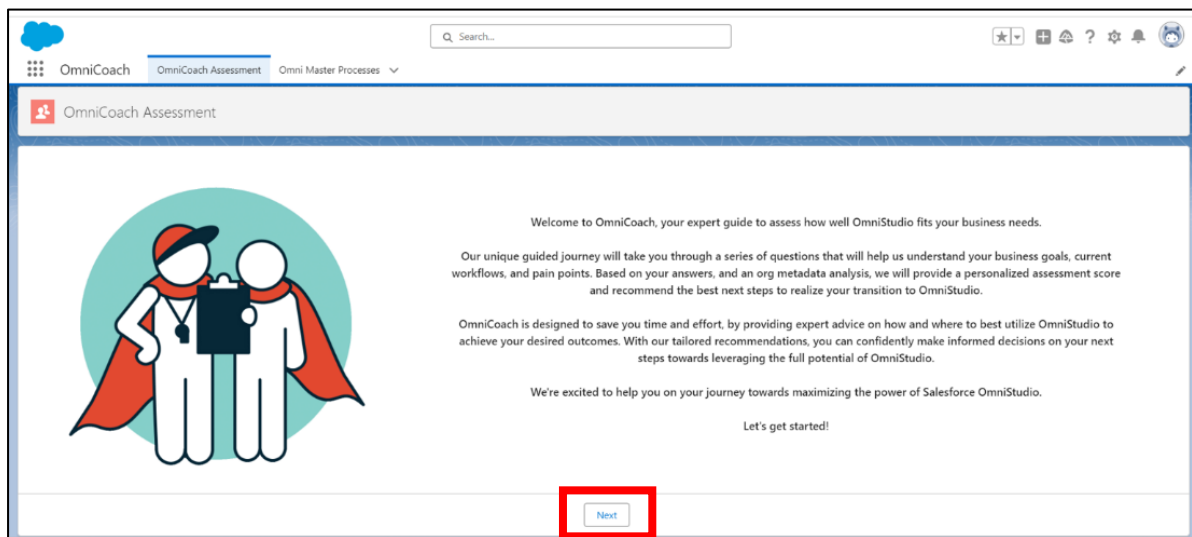
9. By default, OmniCoach Assessment Tab will be selected



10. Under the OmniCoach Assessment Tab, the user can read through a brief introduction on guided journey for the Salesforce OmniStudio



11. The User clicks on Next



12. Upon clicking Next, the User is presented with a set of business-related Questionnaire to answer, as shown below:

The screenshot shows the 'Questionnaire' screen in the OmniCoach Assessment interface. The header 'Questionnaire' is centered, with a sub-header 'Please select the most appropriate option for the following questions.' Below this, the question 'Q. Which industry or vertical does your business map to?' is followed by a list of radio button options: Communications, Media, Energy & Utilities, Financial Services, Banking & Insurance, Healthcare, Life Sciences, Government / Public Sector, Automotive, Manufacturing, Retail, Education, Non-Profit / Philanthropy, Travel & Hospitality, Agriculture, Plantations & Forestry, and Others.

13. From the provided choices, the User selects the applicable industry or vertical their business belongs to

- For example, here the user selects “Financial Services, Banking & Insurance”

This screenshot is identical to the one in step 12, but with the 'Financial Services, Banking & Insurance' option selected. The radio button next to this option is now filled with a blue dot, indicating it is the chosen answer.

14. The remaining questions are based on the above selected Industry Vertical, as shown below:

The screenshot shows the OmniCoach Assessment interface. The top navigation bar includes the Salesforce logo, 'OmniCoach', 'OmniCoach Assessment', and 'Omni Master Processes'. A search bar is on the right. The main content area contains four questions:

- Q. This is a Salesforce Industries supported vertical. Are you currently using or do you have a future vision to leverage any of the Salesforce Industries offerings?**
 - ☐ Currently using
 - ☐ Plan to use in future
 - ☐ Not planning to use
- Q. How many guided user journeys/experiences do you have in your application?**
 - ☐ 0 to 4
 - ☐ 5 to 10
 - ☐ 10+
- Q. What are the pain points in your current implementation?**
 - ☐ High degree of custom Apex usage in existing implementation (nearing org limits)
 - ☐ High degree of UI customization in existing implementation
 - ☐ Intent to build with configuration
 - ☐ High time-to-market
- Q. Have you already purchased OmniStudio licenses?**
 - ☐ Yes
 - ☐ No

15. The User selects the most appropriate choice as per their business.

For example:

- The User is planning to use Salesforce Industry Offerings in their business, in future.
- The User selects 5 to 10 guided user journeys/experience
- The User adds all the existing pain points in their current implementation
- The User specifies whether the OmniStudio licenses have been purchased or not

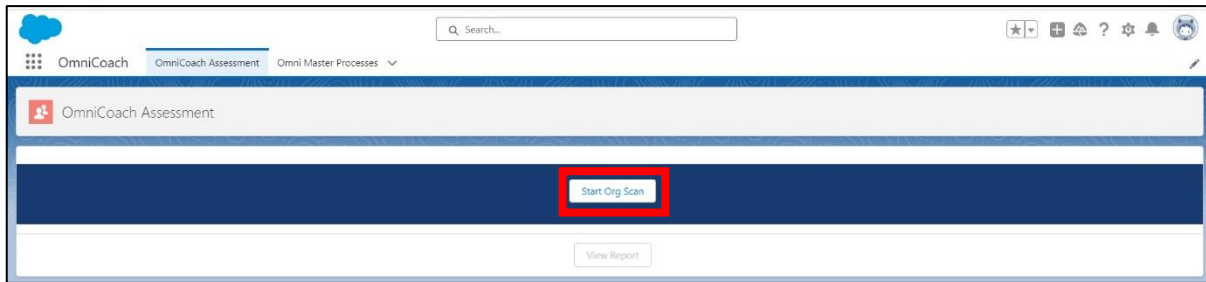
The screenshot shows the same OmniCoach Assessment interface, but with the following selections made:

- Q. This is a Salesforce Industries supported vertical...**: ☒ Plan to use in future
- Q. How many guided user journeys/experiences...**: ☒ 5 to 10
- Q. What are the pain points in your current implementation?**: All four checkboxes are checked: High degree of custom Apex usage, High degree of UI customization, Intent to build with configuration, and High time-to-market.
- Q. Have you already purchased OmniStudio licenses?**: ☒ No

16. After selecting appropriate choices for every question, the user then clicks on Next

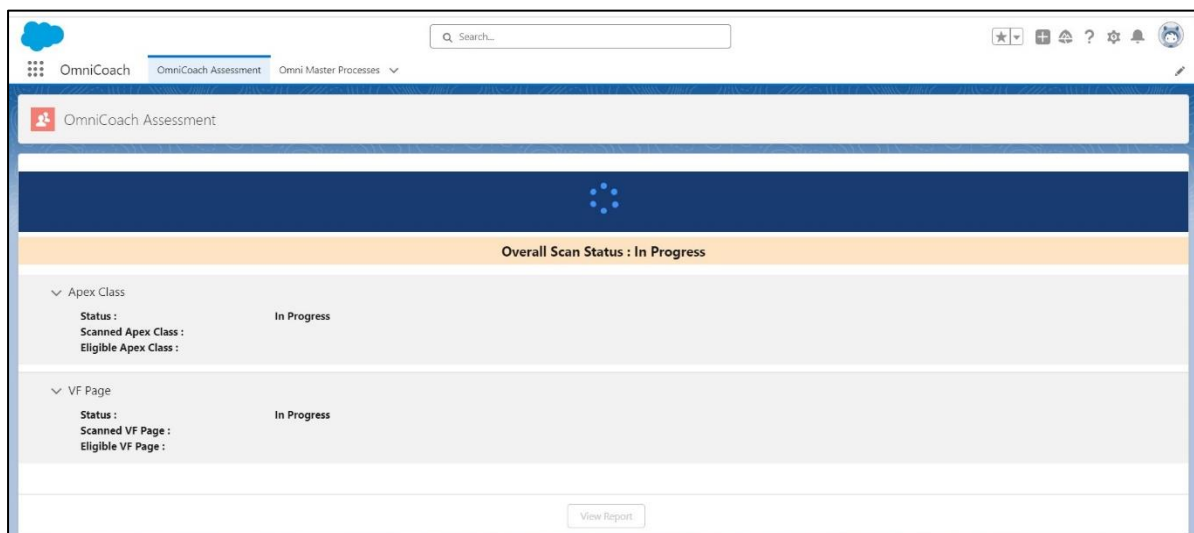
This screenshot is a close-up of the bottom of the assessment form. It shows the last two questions with their selected answers: 'High degree of custom Apex usage...' (checked), 'High degree of UI customization...' (checked), 'Intent to build with configuration' (checked), 'High time-to-market' (checked), and 'Have you already purchased OmniStudio licenses?' (No, selected). At the bottom center, a 'Next' button is highlighted with a red rectangle.

17. Upon clicking on Next, the User will be asked to **Start Org Scan**

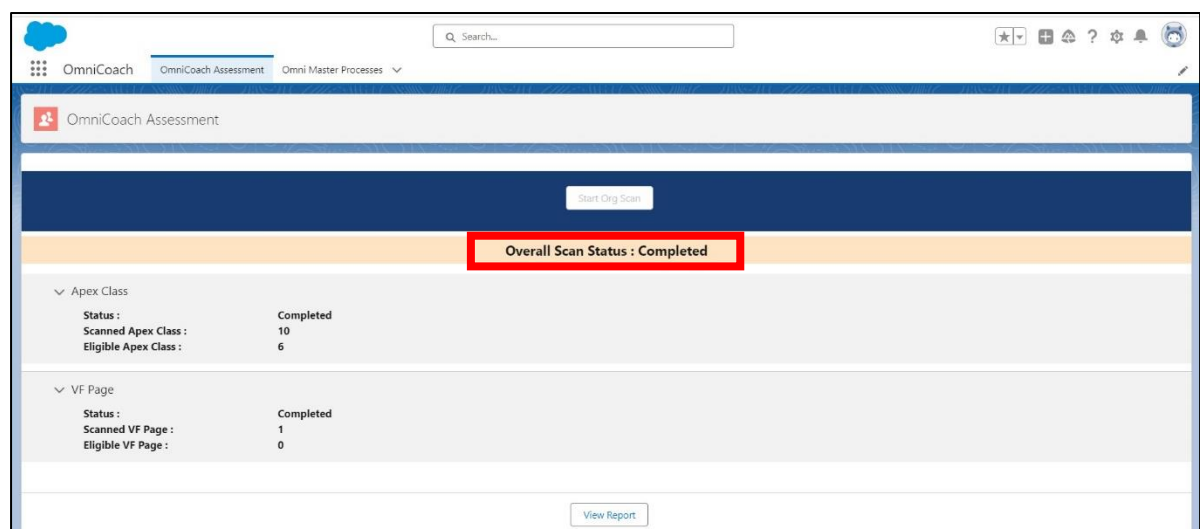


18. Upon clicking on Start Org Scan Tab, the scanning begins for:

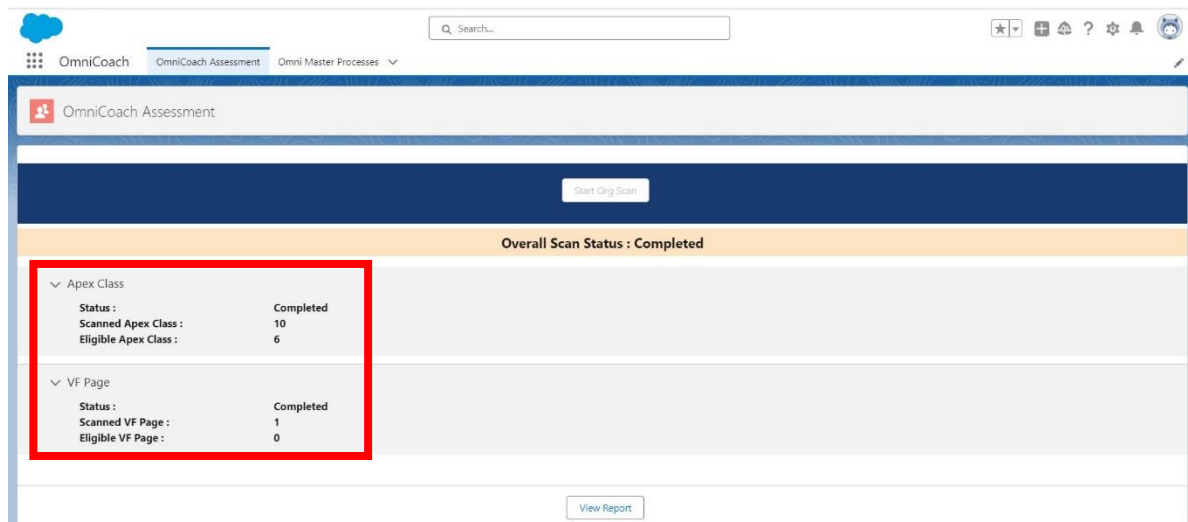
- Apex Class
- VF Page



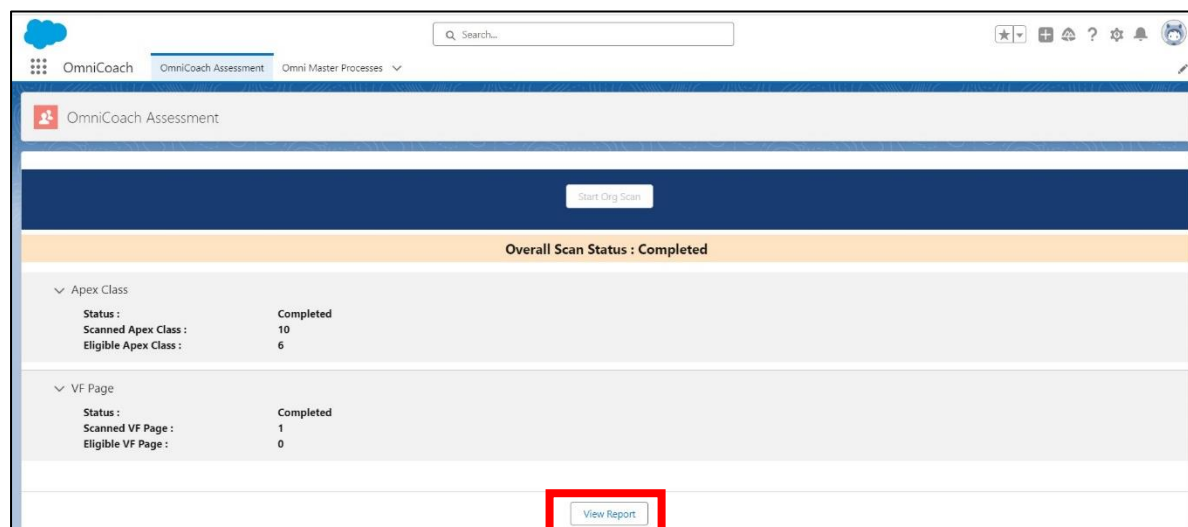
19. Once the scanning is complete, the overall scanning status is shown as Completed



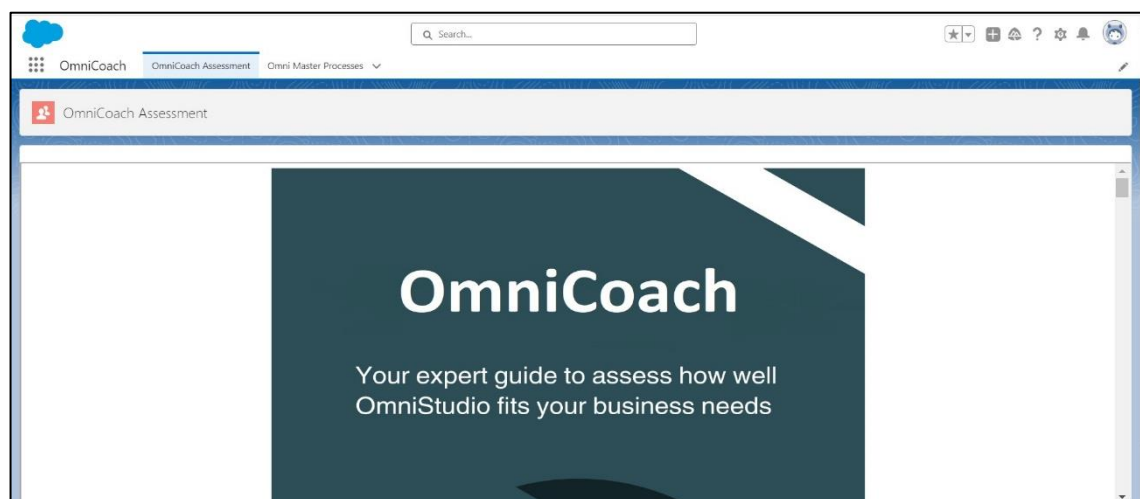
20. The user can see the scan summary with the number of eligible processes for OmniStudio conversions, as shown below:



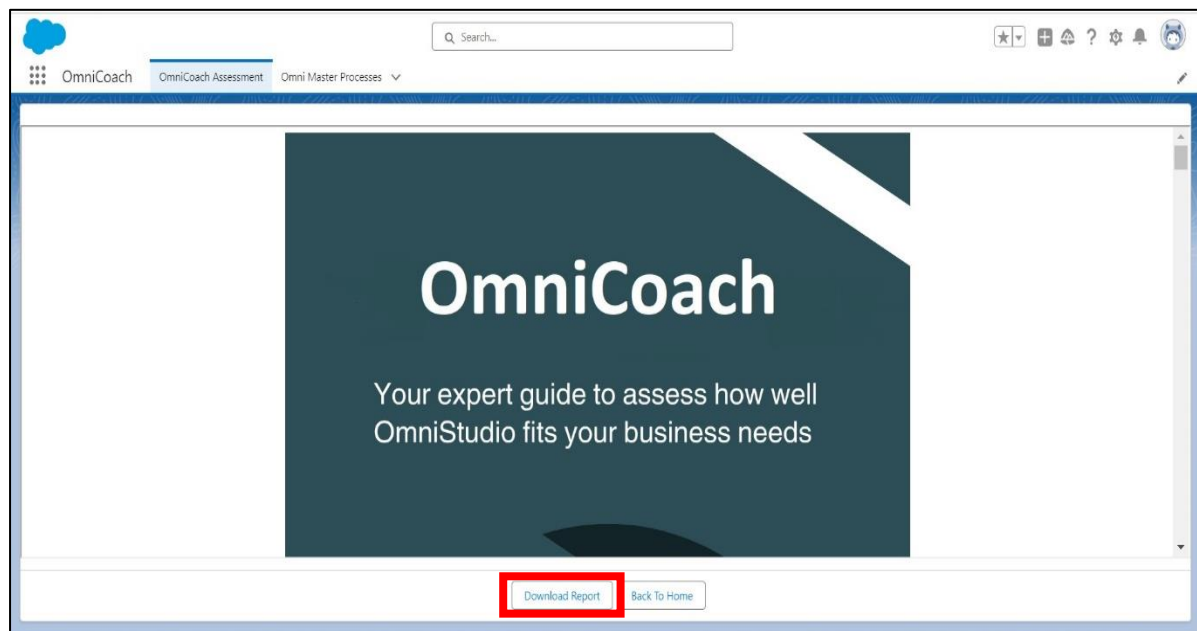
21. Further, the user can see a detailed report by clicking on View Report



22. Now the user can see the detailed report



23. The user can also download the report in the PDF format by clicking on the Download Report Tab



24. Upon opening the report PDF, the user can see a brief description of the report, as shown below:

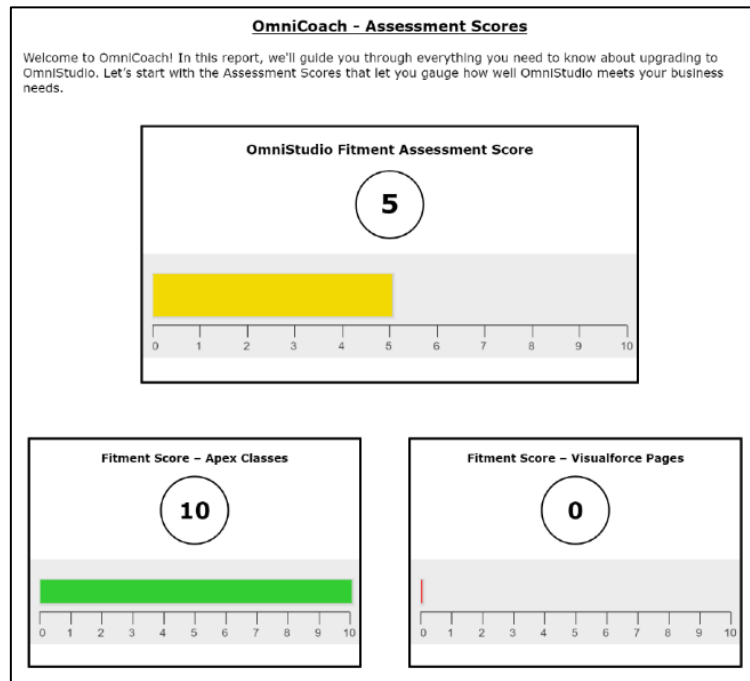
What's in This Report?	Impact Scale	How Do I Use This Report?
We understand you are evaluating whether OmniStudio fits your business needs and how best you can leverage it to upgrade your implementation while maximizing its potential. No-code and configuration-based OmniStudio components can be leveraged to replace existing custom code in Apex Classes, Visualforce Pages, LWCs, Aura Components. Similarly, OmniStudio components can also replace UI Screen Flows and other configuration-based components like Custom Settings and Custom Metadata in the right business context. OmniCoach focuses its attention on what is most impactful in terms of your org health, i.e., recommending the conversion of custom code to OmniStudio. We have analyzed your Salesforce implementation to determine how your company uses Apex Classes, Visualforce Pages, LWCs & Aura Components. We then identified a set of these components as good candidates for OmniStudio upgrades based on our analysis. Finally, we have provided an assessment score to grade the level of OmniStudio fitment for your business.	So how do you read into your Assessment Scores? The overall OmniStudio Assessment Score is calculated as a weighted average of individual OmniStudio fitment scores based on: ✓ your response to the questionnaire ✓ the projected reduction in Apex codebase ✓ the projected reduction in Visualforce codebase ✓ the projected reduction in LWC codebase ✓ the projected reduction in Aura codebase	Review your report to learn about how OmniStudio fits your needs and what steps you must take to get the most out of Salesforce OmniStudio. Throughout this report, we include concrete tailored recommendations that you can implement in your Salesforce org. The recommendations are based on your responses to the questionnaire and our findings from the org scan. With the detailed actionable list of qualified components, the reason for qualifying them & the target OmniStudio component they can be upgraded to, this report can directly be handed over to your architects and developers to kickstart your OmniStudio Transformation journey today!

Accelerate Your Path to Success

Need more help? Reach out to us @EASVlocityCoE@cognizant.com

25. On proceeding further, the user can see weighted assessment scores for-

- Apex Classes
- VF Page
- Overall Assessment Score



26. On the next page of the report, the user can see the Assessment Summary.

OmniCoach - Assessment Summary

Here's an overall summary of the impact that upgrading to OmniStudio will have on your org health. These are based on your responses to the questionnaire and our findings from the org scan.

- Upgrading the list of methods from Apex Classes that have been identified as good candidates for OmniStudio upgrades by OmniCoach will result in a **56.16% reduction in Apex codebase**. This reduction in codebase will help address your current pain point of a high degree of custom Apex implementation.
- Upgrading the list of Visualforce Pages that have been identified as good candidates for OmniStudio upgrades by OmniCoach will result in a **0.00% reduction in Visualforce Pages**. This reduction will help address your current pain point of a high degree of UI customization.
- OmniStudio has a major role to play in Salesforce Industries. Since you are planning to leverage Salesforce Industries in the near future, starting to leverage OmniStudio is a logical choice and will help you in being prepared for a smooth transition into Salesforce Industries.
- Building guided user journeys is a major strength area of the OmniStudio Platform. Since your application has 5+ guided journeys OmniStudio can help simplify the build and maintenance of these journeys to a great extent.
- OmniStudio, being a no-code, configuration based toolset will support your goal to build with configuration.
- Transitioning from a customization heavy to configuration heavy implementation leveraging OmniStudio will let you cut down on your current high time-to-market.
- We realize that you are still evaluating the purchase decision for OmniStudio licenses. The assessment results definitely indicate that you should go ahead. Read on to get detailed insights on exactly where OmniStudio can help.

27. The Assessment Summary comprises of the following information:

❖ First two points specifies-

- Possibility of percentage reduction in Apex Codebase
- Possibility of percentage reduction in VF Pages

OmniCoach - Assessment Summary

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- OmniStudio has a major role to play in Salesforce Industries. Since you are planning to leverage Salesforce Industries in the near future, starting to leverage OmniStudio is a logical choice and will help you in being prepared for a smooth transition into Salesforce Industries.
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- OmniStudio, being a no-code, configuration based toolset will support your goal to build with configuration.
- Transitioning from a customization heavy to configuration heavy implementation leveraging OmniStudio will let you cut down on your current high time-to-market.
- We realize that you are still evaluating the purchase decision for OmniStudio licenses. The assessment results definitely indicate that you should go ahead. Read on to get detailed Insights on exactly where OmniStudio can help.

28. Remaining points of the Assessment Summary are based on the responses submitted in the questionnaire.

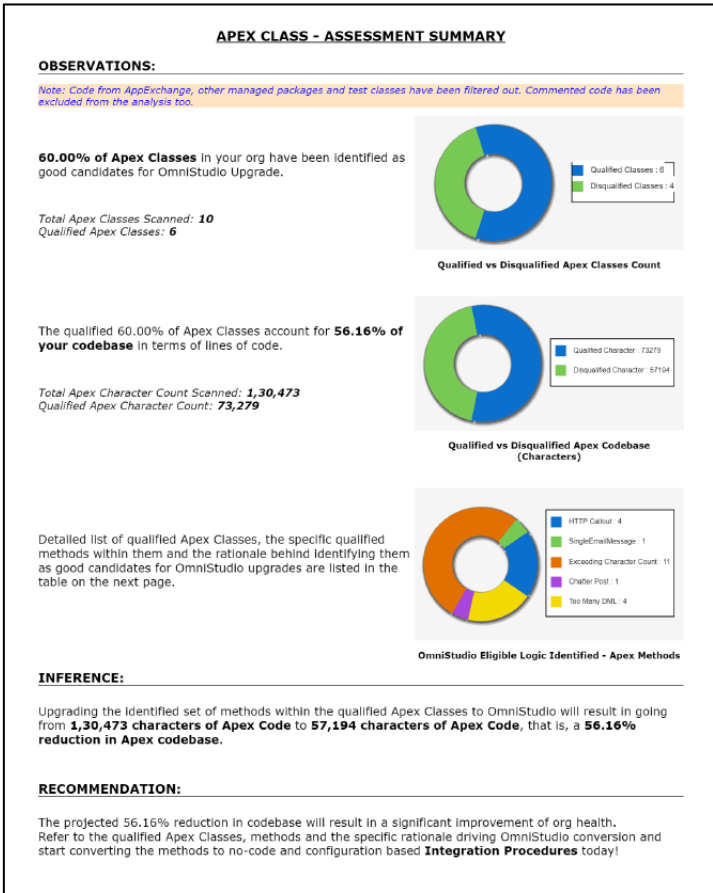
OmniCoach - Assessment Summary

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- OmniStudio, being a no-code, configuration based toolset will support your goal to build with configuration.
- Transitioning from a customization heavy to configuration heavy implementation leveraging OmniStudio will let you cut down on your current high time-to-market.
- We realize that you are still evaluating the purchase decision for OmniStudio licenses. The assessment results definitely indicate that you should go ahead. Read on to get detailed Insights on exactly where OmniStudio can help.

29. The next page of the report shows the detailed Apex Class Assessment Summary, comprising of the technical aspects:

- Observations
- Inferences
- Recommendations

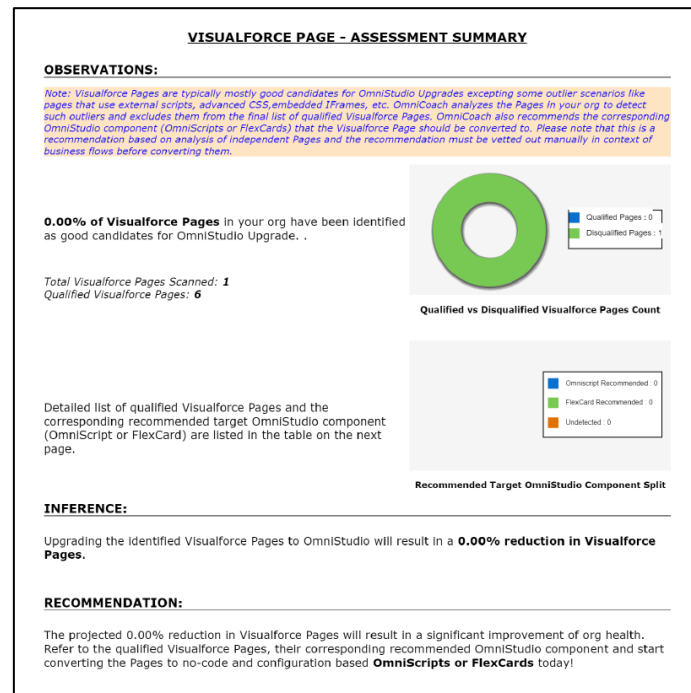


30. The next page of the report shows the eligible Apex Classes and the reasons for the eligibility.

APEX CLASS DISCOVERY		
Class Name	Method Name	Criteria
ApexClassAnalyserBatch	start	HTTP Callout was Implemented.
ApexClassAnalyserBatch	execute	Email Messaging has been used.
ApexClassAnalyserBatch	execute	HTTP Callout was Implemented.
ApexClassAnalyserBatch	execute	Character Count has been exceeded
ApexClassAnalyserBatch	execute	Chatter has been posted
ApexClassAnalyserBatch	execute	DML limit crossed
Class Name	Method Name	Criteria
ApexPageAnalyserBatch	execute	Character Count has been exceeded
Class Name	Method Name	Criteria
LWCAnalyserBatch	start	HTTP Callout was implemented.
LWCAnalyserBatch	execute	HTTP Callout was Implemented.
LWCAnalyserBatch	execute	Character Count has been exceeded

31. Similarly, moving further in the report shows the VF Page Assessment Summary, comprising of the technical aspects:

- Observations
- Inferences
- Recommendations



32. With this, the report concludes.

