[2CEIT603: CLOUD COMPUTING]

Practical:10

AIM: Configuration of CRM on Salesforce Cloud Platform.

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Salesforce

Salesforce is a cloud-based Customer Relationship Management (CRM) software for managing customer relationships and integration with other systems. This SaaS tool helps to create custom solutions for marketing, sales, services and ecommerce as per business requirements. Salesforce has now expanded from just CRM to offer multiple products.

It has more than 800 applications to support various features like generating new leads, acquiring new leads, increasing sales and closing the deals. It is designed to manage the organization's data focused on customer and sales details. It also offers features to customize its inbuilt data structures and GUI to suit the specific needs of a business. More recently, it has started offering the IOT (internet of things) connectivity to the CRM platform.

History

It was founded in March 1999 by ex-Oracle employee Marc Benioff, Frank Dominguez, and Parker HarrisIn June 2004, the company's IPO was listed on the New York Stock Exchange under the stock symbol CRM and raised US\$110 million.

In October 2014, Salesforce announced the development of its Customer Success Platform to merge all the Salesforce's services like sales, service, marketing, analytics, etc.

In 2017, Sales force launched a Facebook Analytics tool.

In 2018, Sales force partnered with Apple for improving apps for businesses.

Salesforce.com translated its services into 16 different languages. It currently has 82,400 regular customers and over 2,100,000 subscribers.

1. What is Salesforce?

In simple language. Salesforce is a tool which helps people manages their database in a very interesting and easy to use interface. In order to make it more efficient salesforce has added more functionality to manage your complex automations in daily activities of a business process. It is not just a Customer Relationship Management Tool; it provides us Software, Platform and Infrastructure as a service. You can develop several application using easy to use drag and drop environment. Along with it you can develop websites, portals etc. You can use its standard applications which are made for standard business process

in Sales, Customer Service (Case Management), and Marketing management

Salesforce.com is a cloud computing and social enterprise software-as-a-service provider based in San Francisco. It was founded in March 1999,in part by former Oracle executive Marc Benioff. Other than this you can develop custom applications like recruitment management, warehouse management and many more.

Salesforce offers cloud services like Sales Cloud which can be used by your organization's Sales team, Marketing Cloud which can be used by your marketing team, chatter a social application which your organization can use to connect employees and various other services.

2. CRM(Customer Relationship Management)

A CRM system is a business tool that allows you to manage all your customers, partners and prospects information all in one place. The Sales Cloud (Salesforce.com's CRM system) is a secure cloud based CRM system that can help every part of your business get a 360 degree view of your customer.

Salesforce Is Customer Focused: Salesforce CRM applications are built on the power of App Cloud, so you can run your business on any device, easily build new customer applications or integrate with existing back office systems.

Today, over 100,000 of the world's most innovative companies—small, medium and large—use Salesforce Customer Relationship Management system to close bigger deals faster.

3. Features of Salesforce

Marketing and sales lead: Helps you to measure customer engagement by tracking email activities and convert them to customers.

Contact management: With the help of this feature you can pull your customer's data like activity history, frequent contacts, customer communications, etc.

Opportunities and quotes: Helps vendor to create opportunity and quote.

Build and run innovative apps: You can build, scale and manage apps

Analytics: It allows you to access the data, create dashboards and perform analysis

Email integration: It provides integrations devoted to customer service, support and customer experience Communities for sales:- Online community software that enables companies to connect customers, partners and employees with each other

Salesforce Engine: This feature focuses on making personalized contact with a customer for various campaigns designed by the marketing team

Sales Collaboration: This feature helps you to address customer queries and feedback

Sales Performance Management: It offers a metric-based goal setting and helps you to get feedback & rewards for the sales team.

Lead Management: This feature helps you to tracks the leads that are in progress

Territory Management: This feature allows you to create multiple territory models. You can also preview them before rollout, and helps you to optimize and balance territories

Partnership management: This feature allows you to build communities with partners and help them to share objectives, goals, and activities

Workflow and Approvals: The interface provides simple drag and drops option

Files Sync and Share: This feature provide the sales team the power to share various files and update them instantly

Reports and Dashboards: Dashboards and reporting feature offers a real-time picture of the business at a glance

Sales Forecasting: This feature allows you are getting a real time view of the forecast of a sales team

4. Salesforce Architecture

The architecture of Salesforce can be divided into various components described as follows:

Trusted multitenant Cloud: In this component, multiple instances of one or more application operate separately in a shared environment. The instances are known as tenants which separate from each other.

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Although, there are physically remain in the same hardware. It is called trusted as it offers a high level of security.

Scalable Metadata Platform:

This component helps you to customizations. It also allows you to increase the amount of data or concurrent user instances.

Enterprise Ecosystem:

The enterprise Ecosystem of Salesforce is quite big as many partners contribute by creating and maintaining in this platform.



APIs:

Salesforce offers a powerful suite of APIs to develop the Mobile App.

5. Cloud provided by Salesforce

Sales Cloud

Salesforce Sales Cloud manages contact information and integrates social media and real-time customer collaboration through Chatter. It supports sales, marketing and customer support in both B2B and B2C contexts. Sales Cloud helps track customer information and interactions in one place, automates complex business processes, keeps all information up to date, nurtures leads and tracks the effectiveness of marketing campaigns. Features in Sales Cloud include contact management, opportunity management, Salesforce Inbox, Salesforce Engage, lead management, reports and dashboards, Wave App for Sales, marketing automation and more.

Marketing Cloud

Salesforce Marketing Cloud is the only integrated Customer Engagement platform to deliver personalized customer engagement at scale. It is offered across all channels i.e. email to web, social, mobile, and digital advertising.

Salesforce Marketing Cloud helps personalize email marketing at scale ,engage with mobile messaging ,connect social to marketing, sales and service, manage ad campaigns to help with customer acquisition,deliver personalized web content that is efficient and create 1-to-1 customer journeys across channels.

Service Cloud

Salesforce Service Cloud is a service platform for customer service and support. It includes a call center-like case tracking feature and a social networking plug-in for conversation and analytics. Service Cloud helps agents solve customer problems faster, gives customers access to answers to solve problems on their own, helps personalize service, predicts needs, and helps deliver support to customers wherever they may be. Features in Service Cloud include live agent, communities, LiveMessage, Snap-ins, Field Service Lightning, Omni Routing, and social customer service

Analytics Cloud

Salesforce Analytics Cloud, or Salesforce Wave Analytics, is a business intelligence platform that allows organizations to instantly get important answers and start making data-driven decisions. Analytics allows users to act on data instantly, connect easily to Sales and Service cloud data, work from any device, analyze data for better insights, and utilize analytics apps for every function including sales, service, marketing, HR and IT.

Community Cloud

Salesforce Community Cloud connects and facilitates communication among employees, customers and partners. The Community Cloud helps build communities for any needs, provides a platform for customers to help themselves and each other, builds deeper customer relationships by allowing customers to interact with each other, allows partners to connect and increase sales, and helps drive employee productivity through online collaboration. Some features included in Community Cloud are personalization, Lightning Bolt, case escalation, e-commerce, Salesforce automation, collaboration and community management.

Commerce Cloud

The salesforce commerce cloud service is all about the customer services and experiences. It allows the companies to provide the best services and experiences to their customers, either online or instore. It integrates customer data to provide a better customer experience.

The Salesforce commerce cloud provides the leading B2B(Business to Business) and B2C(Business to Consumer) e-commerce solutions to the organizations.

It follows the multi-tenant architecture and the cloud-based commerce platform to provide different powerful abilities to the brands. With the help of commerce cloud, brands can create intelligent, unified purchasing experiences through all the possible channels, such as mobile, web, social media, and offline stores.

6. Advantages and Disadvantages Advantages:

Salesforce is the innovative company behind the world's #1 CRM platform. Our software is cloud-based, so it doesn't require a team of IT experts to set up or manage you just log in and start using it.

Easily log, manage, and analyze all customer activity in one place with our suite of web-based CRM software. Constantly monitor everything from sales leads to support tickets, and from channel marketing to website analytics.

Low cost, low risk cloud based solution software service to buy.

Complete solution includes feature-rich solution for marketing, sales, service, partner management and community management.

Fast result because it drain resources on high value and focus on innovation.

It is a cloud computing technology. It is available on cloud, no need install any software and no hardware required.

Disadvantages:

Lots of screen refreshes and scrolling up and down; the transition between multiple screens to process transactions can deliver a tedious experience.

Customization toolkits can be cumbersome to use, even to many seasoned administrators.

Dashboards may not reflect the application security for specific users without significant administration effort.

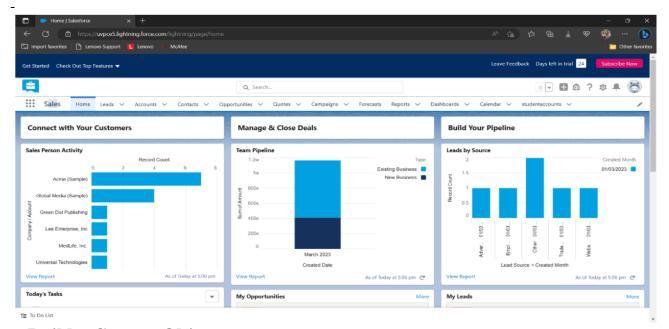
No Service Level Agreement provided in standard contract.

Data centre reliability has been questioned and several major interruptions in service have been widely publicized.

Users can also lose a personal touch as in the process of automation.

7. Configuration steps:-

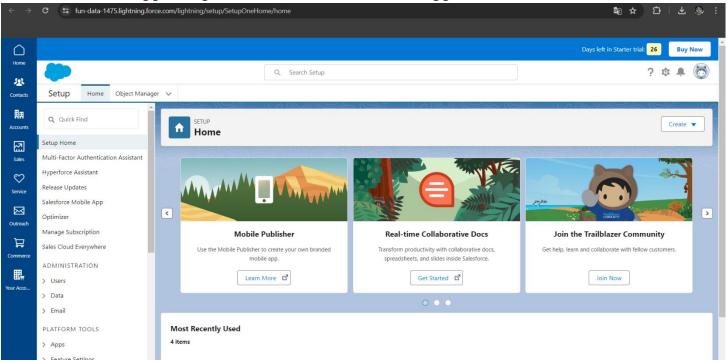
- 1. GO to : Login | Salesforce
- 2. Click on Try for Free and Create your account.
- 3. Click on Login and enter your credentials.



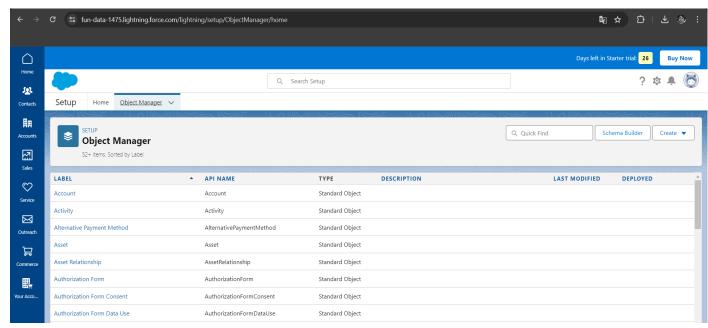
***** Build a Custom Object:

Let's start by creating a custom object, student: to store information about the students.

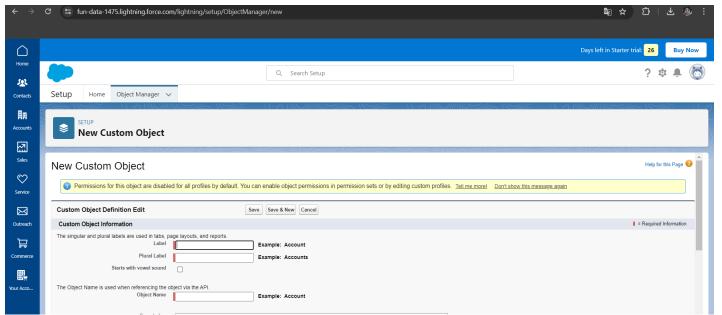
1. Click on app manger then Create new Custom app



2. Click the Object Manager tab next to Home. It Shows list of all the objects.



3. Click Create and select Custom Object.



4. Create an object follows:

• Label: Student

• Plural Label: Students

• Object Name: Students

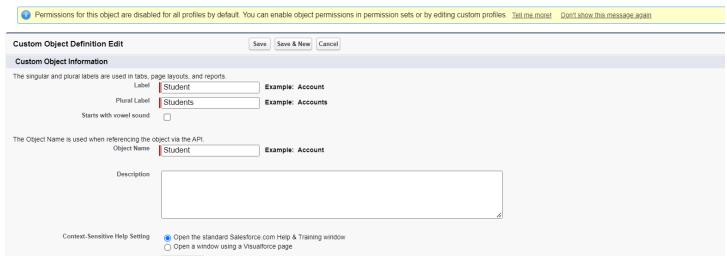
• Record Name: Student Name

• Data Type: Auto Number

• Display Format: 1-{0}

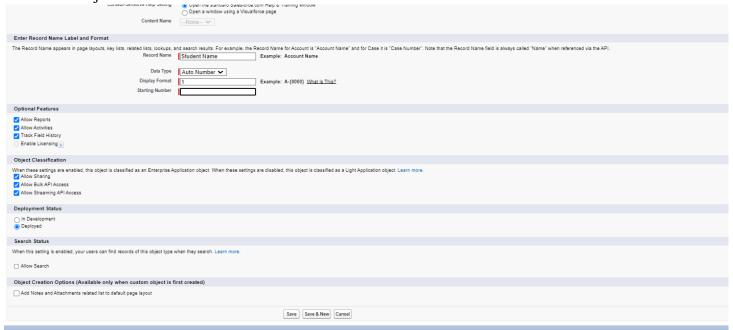
- Starting value = 1
- Under Optional features, select all
- Under object creation option(available only when a custom object is first created), select Launch New Custom Tab Wizard after saving this custom object.

New Custom Object



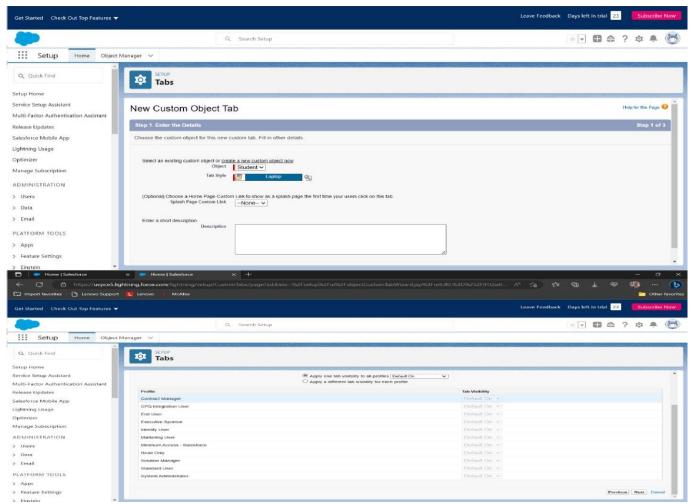
Make a Custom Tab.

Note: If the tab wizard didn't automatically launch, that's Ok. Enter Tabs in quick find and select tabs. In the custom object tabs section.



Click new.

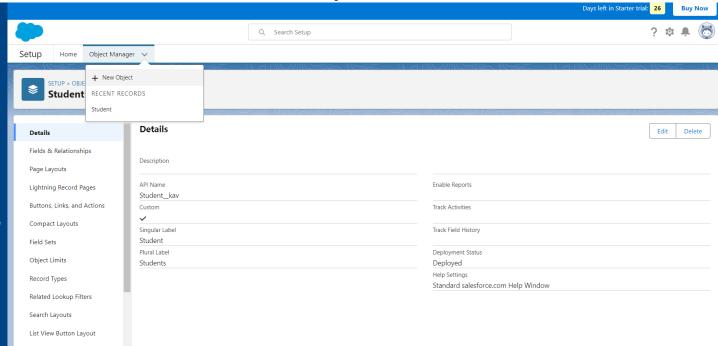
- 1. For Object, select Student.
- 2. Click Tab style and choose any image (we choose the laptop). Click Next, Next.



3. Uncheck all the ticks. In this step we need to choose application for which we have to add object in. As we have not created application yet, we all add it later.

En Import favorites | 🖰 Lenovo Support 📙 Lenovo 👂 McAfee Q Search Setup * - • • • • Setup Home Object Manager ∨ Q. Quick Find Tabs Setup Home Service Setup Assistant Lightning Usage Optimizer Sales (standard__Sales) Manage Subscription Salesforce Chatter (standard Chatter) Marketing (standard__Marketing) ADMINISTRATION > Users Community (standard__Community) > Data Sample Console (standard__ServiceConsole) > Email Sales (standard__LightningSales) PLATFORM TOOLS Relationship Management (Relationship Manageme > Apps Lead Generation (Lead_Generation) > Feature Settings Sales Operations (Sales_Operations) > Einstein

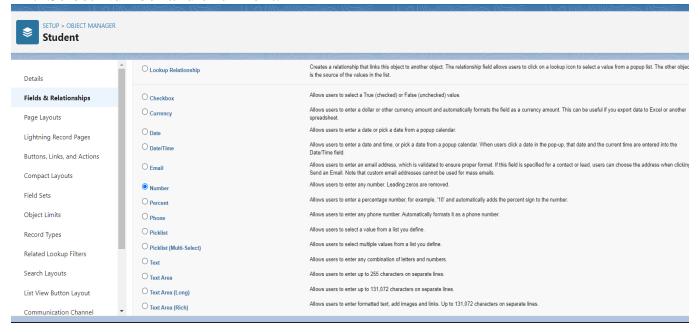
4. Click save. Now we have our custom object and a tab.



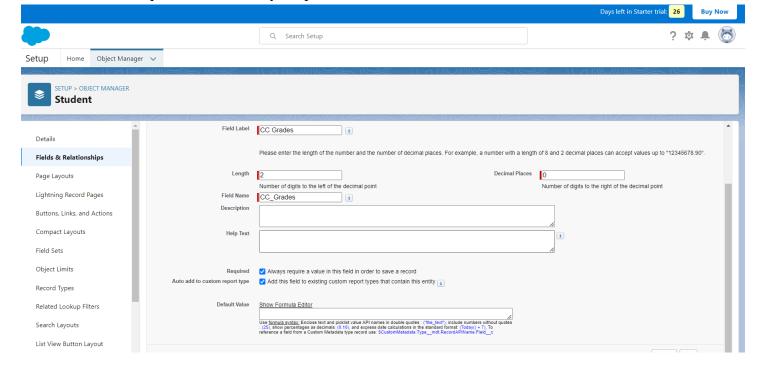
***** Create the Custom Field:

First, we all create marks field.

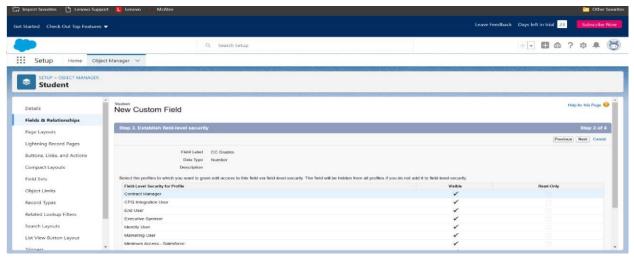
- 1. Click Fields & Relationships in the sidebar, and then click New.
- 2. Select Number and click next.



- 3. Define the field as follows:
 - > Field Label: CC Grades
 - Length: 2
 - At Required, select Always require a value in this field in order to save a record.

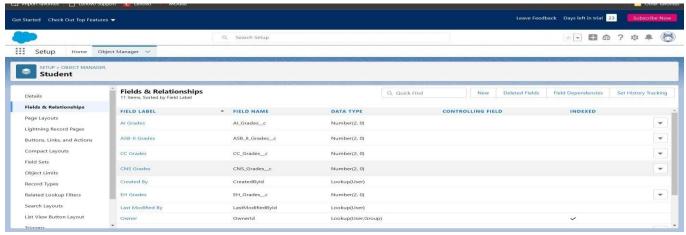


4. Leave everything else as is and click Next, Next and Save.

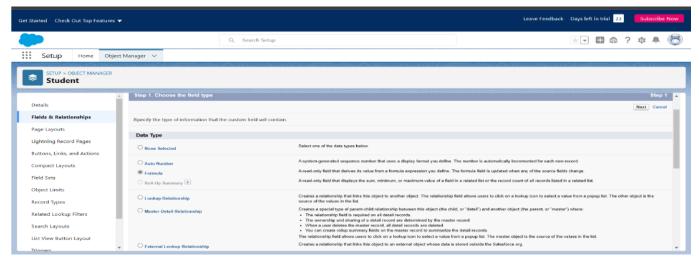


- 5. Similarly, Create fields as
 - > TOC Grades
 - ➤ AI Grades
 - ➤ ASB-II Grades
 - > EH Grades
 - CNS Grades

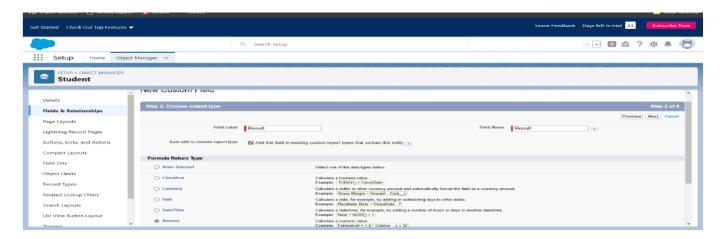
 - ➤ UI/UX Grades
- **Create the Custom Field for Result:**



- 1. In the Fields & Relationships section, click New.
- 2. Select formula data type click next.

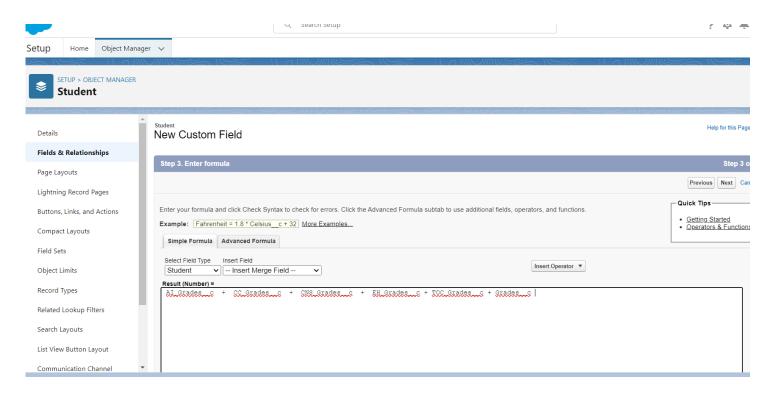


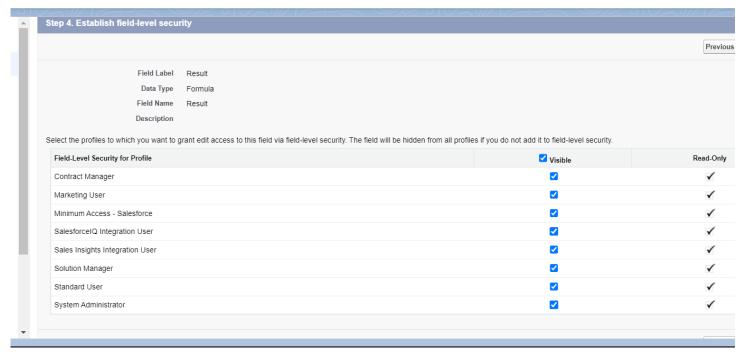
3. Select return type as number & label it as result and click next.

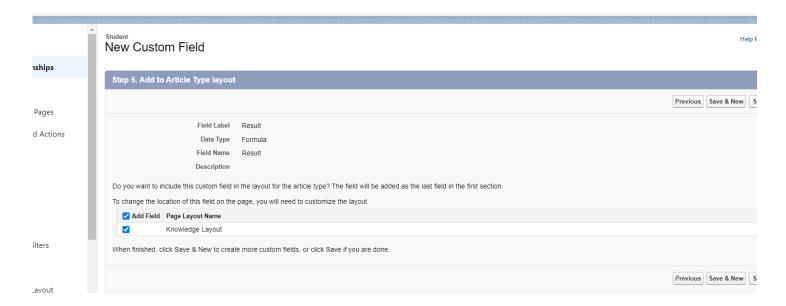


4. Insert the marks field from insert Field menu and between each field insert operator from insert operator menu.

Practical-10







1. Create the Custom Field Student Name, Enrollment No, Branch, Batch,

Email: Define the field "Student Name "as follows:

- Field type: Text
- Field Label: Student Name
- Length: 20
- At Required, select Always require a value in this field in order to save a record.

 Define the field "Enrollment No" as follows:
 - Field type: Number
 - Field Label: Enrollment No
 - Length: 11
- At Required, select Always require a value in this field in order to save a record.
 - At Unique, do not allow duplicate values.

Define the field "E-mail" as follows:

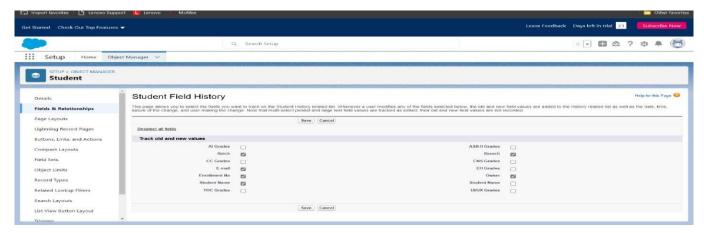
- ➤ Field type: E-mail
 - Field Label: E-mail
- At Required, select Always require a value in this field in order to save a record.
 - At Unique, do not allow duplicate values.

Define the field "Branch" as follows:

- ➤ Field type: Picklist ➤ Field Label: Branch
- Values: Select Enter values, with each value separated by a new line
- At Required, select Always require a value in this field in order to save a

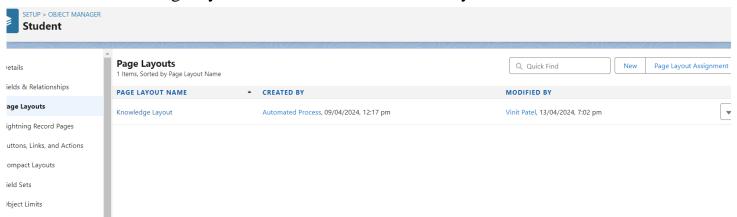
record. Define the field "Batch" as follows:

- > Field type: Picklist
- Field Label: Batch
- Values: Select Enter values, with each value separated by a new line
- At Required, select Always require a value in this field in order to save a record.
- **2.** Choose layout and choose field that you want to track. Click Save.

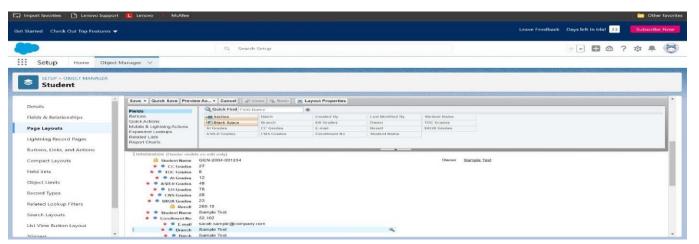


Page Layout for the object student:

1. Click Page layout in the sidebar and choose layout.



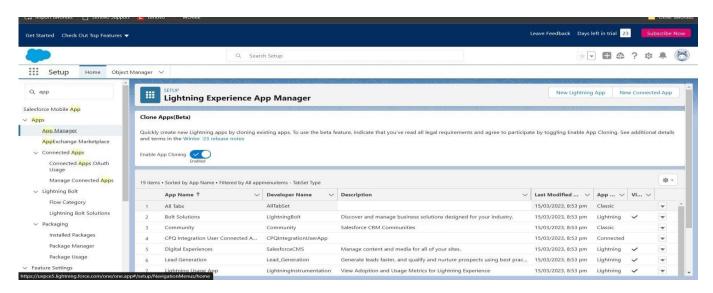
2. Adjust the fields in the way you want to show to the users.



***** Build a Custom App:

1. In Setup, click the Home tab.

2. Enter App Manager in the Quick Find and select App Manager.

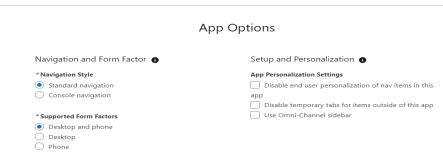


- **3.** Click New Lightning App.
- **4.** Complete the New Lighting App wizard as follows:
 - App Details & Branding:
 - 1. App Name: Internal_Result
 - 2. Description: Provides result for the internal examination.
 - 3. Click Next.

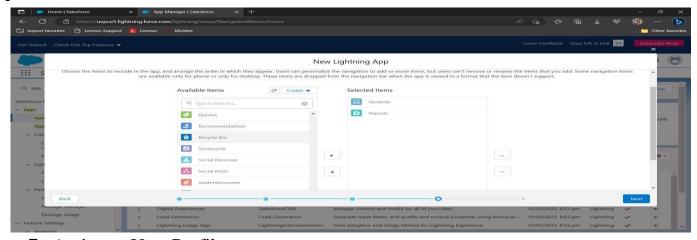
App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar. App Details App Branding *App Name 🕕 Primary Color Hex Image 🚯 Value 🚯 Internal Result Ganpat * Developer Name 🛭 Vinit Patel Description 0 Provides result for the internal examination. Org Theme Options Use the app's image and color instead of the org's custom theme

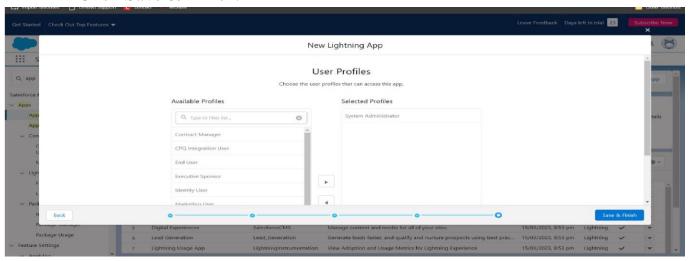
New Lightning App



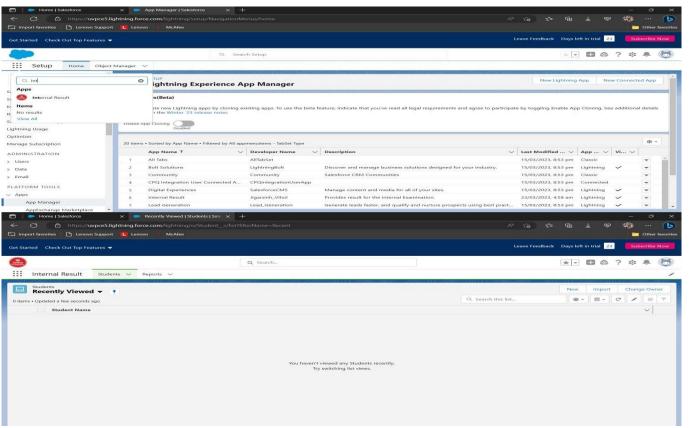
- **5.** Click next on the Next two screens(App Options and Utility Items).
- **6.** In Navigation Items:
 - > Select the students item and then click to move it to Selected items.
 - ➤ Do the same with the Reports item. ➤ Click Next.



- **7.** Assign to User Profiles.
 - > Select the System Administrator profile, click to move it to selected Profiles.
 - > Click Save & Finish.



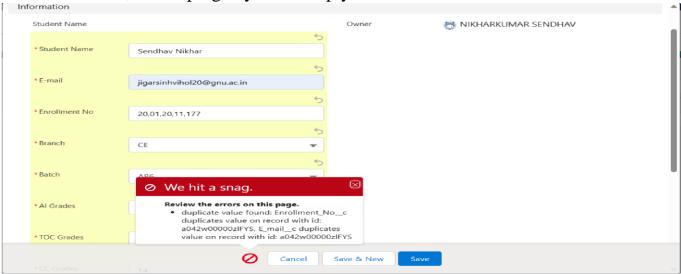
- ***** Create New Students:
 - 1. First, let's open up our new Internal_Result app. Click the App Launcher and select Internal_Result. There are two tabs in your Internal_Result app: Students and Reports.

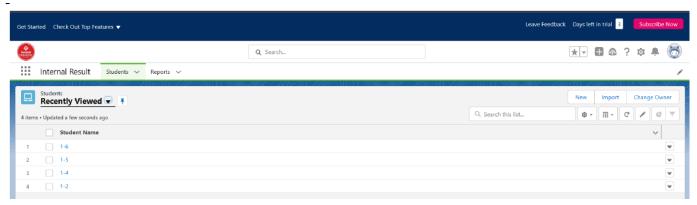


2. Complete the form and Click Save.

Information MIKHARKUMAR SENDHAV Student Name *Student Name Jigarsinh Vihol *E-mail jigarsinhvihol20@gnu.ac.in *Enrollment No 20,01,20,11,177 * Branch CE AB6 * Al Grades 15 Save & New Cancel et Started Check Out Top Features 🕶 * - • Internal Result Students V Reports V Student 1-2 New Contact Edit New Opportunity ▼ Related **Details** Activity Student Name MIKHARKUMAR SENDHAV Student Name Jigarsinh Vihol Filters: All time • All activities • All types | xix 20,01,20,11,177 Batch CC Grades EH Grades CNS Grades UI/UX Grades ASR-II Grades

3. If you enter same E-mail or same Enrollment Number or Enrollment Exceeding limit of 11, or Keeping any field Empty it will show error.



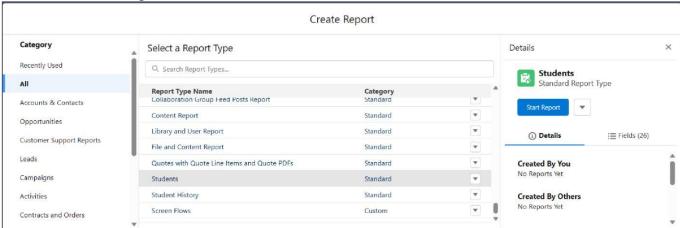


***** Make a Student Report:

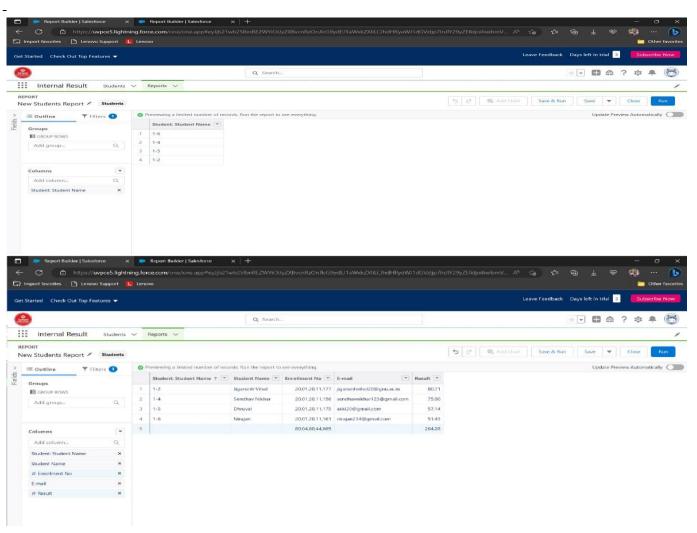
Reports in Salesforce help you keep track of important data. You can also translate them into charts to show visualizations of your data.

For, Result stand, let's create a report that shows us all student, organized by result. 1. Click the Reports tab.

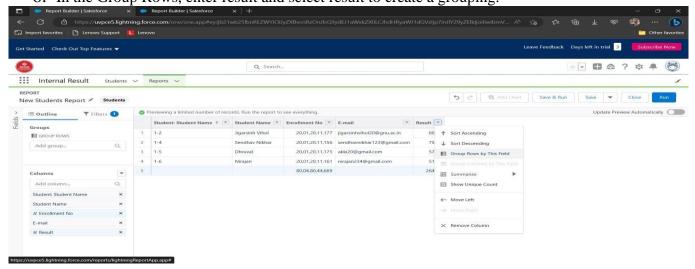
2. Click New Report.



- 3. In the Search Report Types, Enter Students and select Students.
- 4. Click Continue.
- 5. Enter all the columns.

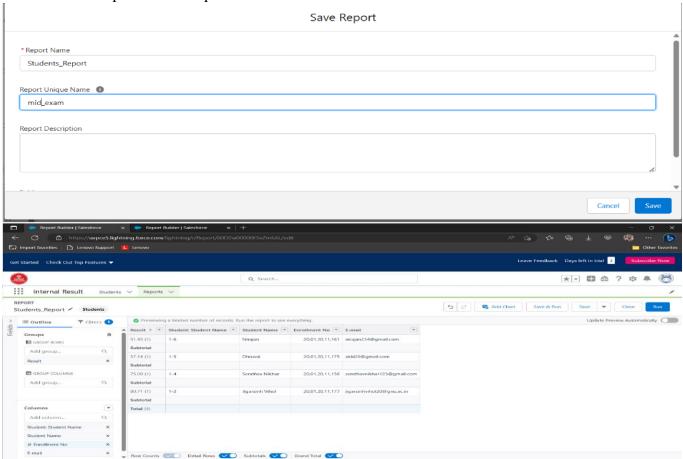


6. In the Group Rows, enter result and select result to create a grouping.



- 7. Enable Update Preview Automatically in the upper-right side of the Report Builder.
- 8. Click Save and save the report as

Follows: Report Name: Students Report Description: show report of the result.



9. Click Save and save the report as follows: Report Name: Students Report Description: Show report of the result.

