

Salesforce Project Documentation

Project Title:

Simple Contact Management System

Project Overview

The Simple Contact Management System is a Salesforce CRM application developed to store, manage, and organize contact information effectively. The system enables users to maintain records of customer details such as name, phone, email, address, and the company they are associated with. It helps streamline contact management, improve data accessibility, and support better customer relationship tracking through reports and dashboards.

Objectives

- To develop a user-friendly Salesforce application for managing customer contact data.
- To automate record creation and validation for clean data input.
- To enable quick reporting and analysis of customer data using dashboards.
- To demonstrate Salesforce core admin functionalities like custom objects, validation rules, automation, and reporting.

Phase 1 – Problem Understanding & Industry Analysis

Requirement Gathering:

Businesses often rely on scattered spreadsheets or documents to manage customer contact details. This leads to duplication, data loss, and difficulty tracking communication history. The goal is to create a centralized Salesforce app that stores all contact-related information securely and accessibly.

Stakeholder Analysis:

Stakeholder	Role	Responsibility
Admin	System Setup	Create objects, fields, and automation
Sales Executive	User	Add, view, and manage contact records
Manager	Reviewer	Review reports and monitor customer data

Business Process Mapping:

1. User adds a new contact.
2. System validates email format.
3. If the company doesn't exist, the system auto-creates it.
4. Reports and dashboards summarize total contacts per company.

Industry Use Case:

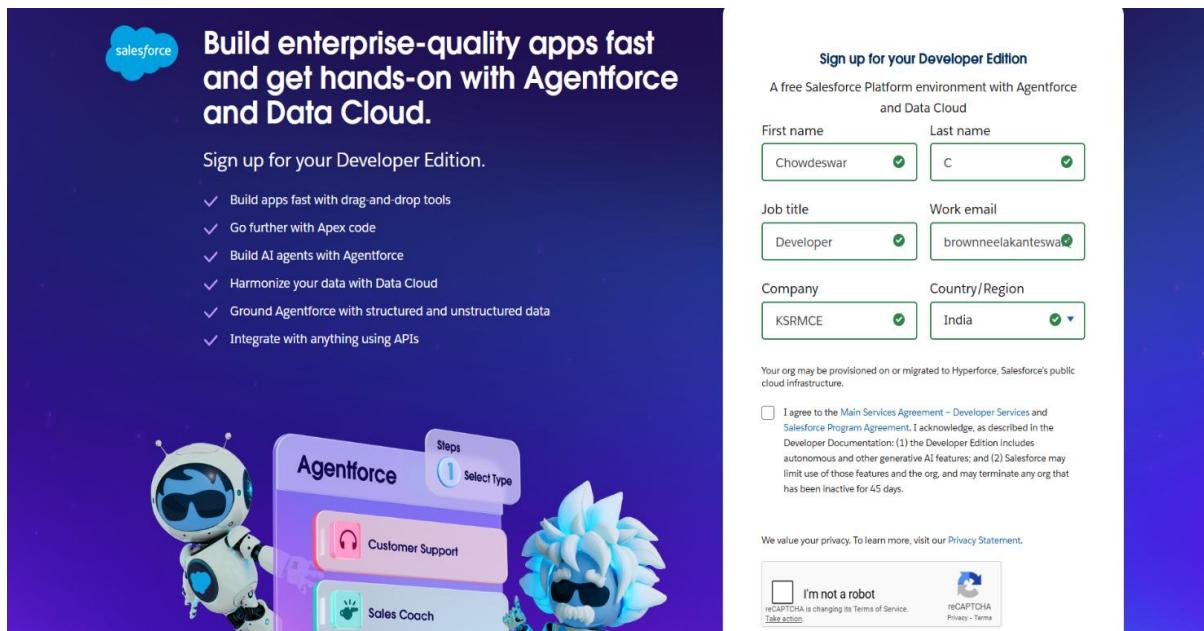
Used by small and medium-sized businesses to centralize customer contact information, improve communication tracking, and enhance sales operations.

Phase 2 – Org Setup & Configuration

- **Salesforce Edition:** Developer Edition
- **Company Profile:** Simple Contact CRM Pvt Ltd.
- **Business Hours:** Mon–Fri (9:00 AM – 6:00 PM)
- **Users Created:** Admin and Contact Manager
- **Login Access Policies:** Limited to internal users

Step 1: Log in to Salesforce Developer Edition

1. Go to <https://developer.salesforce.com/signup>
2. Fill in your details → click **Sign Me Up**
3. Check your email → click the verification link → set a **password**.
4. Now open your **Developer Org** at
<https://login.salesforce.com>
5. Log in using your email and password.
You'll enter your Salesforce **Lightning Experience** home page.



The screenshot shows the sign-up page for the Salesforce Developer Edition. The header features the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, there's a section titled "Sign up for your Developer Edition" with a list of benefits:

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

The main form fields include:

First name	Last name
Chowdeswar	C
Job title	Work email
Developer	brownneelakantewar...
Company	Country/Region
KSRMCE	India

Below the form, there's a note about org provisioning, a checkbox for the Main Services Agreement, and links for Privacy Statement and reCAPTCHA. The background features a blue gradient with a white robot icon and a purple cloud-like shape.

Step 2: Company Setup

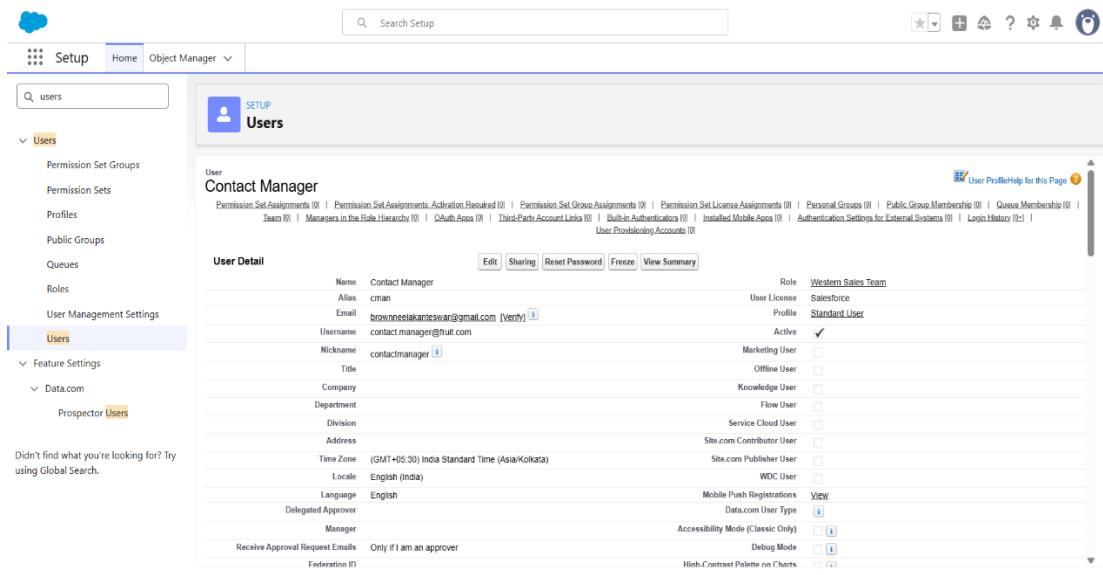
1. Click the gear icon → Setup.
2. In Quick Find, type **Company Information**.
3. Click **Edit** → set:
 - **Company Name:** Simple Contact CRM Pvt Ltd
 - **Default Locale:** English (India)
 - **Time Zone:** Asia/Kolkata
4. Click **Save**.

Organization Detail	Value
Organization Name	Simple Contact CRM Pvt Ltd
Primary Contact	OrgFarm EPIC
Division	India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	342 KB (7%)
Used File Space	17 KB (0%)
API Requests, Last 24 Hours	39 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00Dgk00000Eueb7
Organization Edition	Developer Edition
Instance	CAN96

Created By: OrgFarm EPIC, 11/4/2025, 12:15 AM Modified By: Chowdeswar C, 11/9/2025, 4:59 AM

Step 3: Create Users

1. In Setup → Search “Users” → **Users** → **New User**.
2. Create:
 - Name: *Contact Manager*
 - Email: your secondary email
 - Role: *Sales Executive*
 - Profile: *Standard User*
3. Click **Save**.



Phase 3 – Data Modeling & Relationships

Standard Objects Used:

- **Contact** (standard object)

Custom Objects Created:

- **Company** – to store organization details related to contacts.

Fields Created on Company:

Field Label	Data Type	Description
Company Name	Text	Name of the company
Industry	Picklist	Type of business (IT, Manufacturing, etc.)
Location	Text	Company address

Relationships:

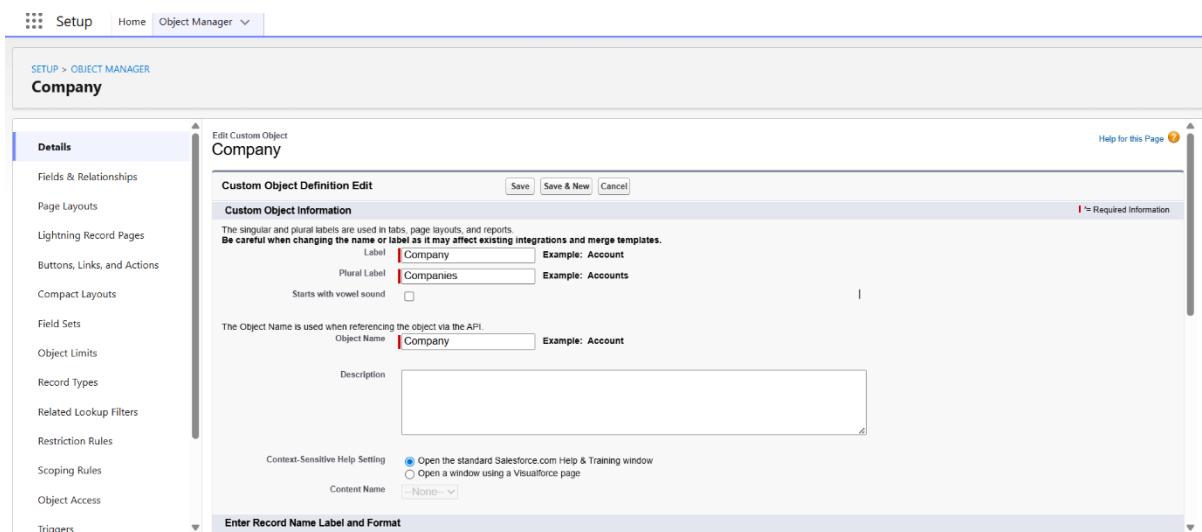
- Lookup relationship between **Contact** and **Company** objects (Each contact belongs to one company).

Page Layouts:

Customized **Contact Layout** to show Company, Email, and Phone fields together for better usability.

Step 1: Create Custom Object – Company

1. In Setup → Search “Object Manager” → **Create** → **Custom Object**
2. Fill details:
 - o Label: Company
 - o Plural Label: Companies
 - o Record Name: Company Name
3. Check “Allow Reports” and “Track Activities.”
4. Click **Save**.



Step 2: Add Custom Fields to Company

Go to **Object Manager** → **Company** → **Fields & Relationships** → **New**
Create the following fields:

Field Label	Type	Example Values
Industry	Picklist	IT, Manufacturing, Education
Location	Text	Chennai, Mumbai
Website	URL	www.company.com

Click **Save** after each field.

Fields & Relationships				
8 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Company	Company__c	Lookup(Company)		✓
Company Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Industry	Industry__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(100)		
Owner	OwnerId	Lookup(User,Group)		✓
Website	Website__c	URL(255)		

Step 3: Create Relationship Between Contact and Company

1. Open Object Manager → Contact → Fields & Relationships → New.
2. Choose Lookup Relationship.
3. Related To: Company.
4. Field Label: Company.
5. Save.

Now, every contact can be linked to one company.

Phase 4 – Process Automation (Admin)

Validation Rule:

Name: Validate_Email

Description: Ensures that email field contains “@”.

Formula:

```
NOT(CONTAINS>Email, "@")
```

Error Message: “Please enter a valid email address.”

Flow:

Name: Auto Create Company

Type: Record-Triggered Flow

Use Case: When a contact is created and no company exists with the given name, automatically create a new Company record.

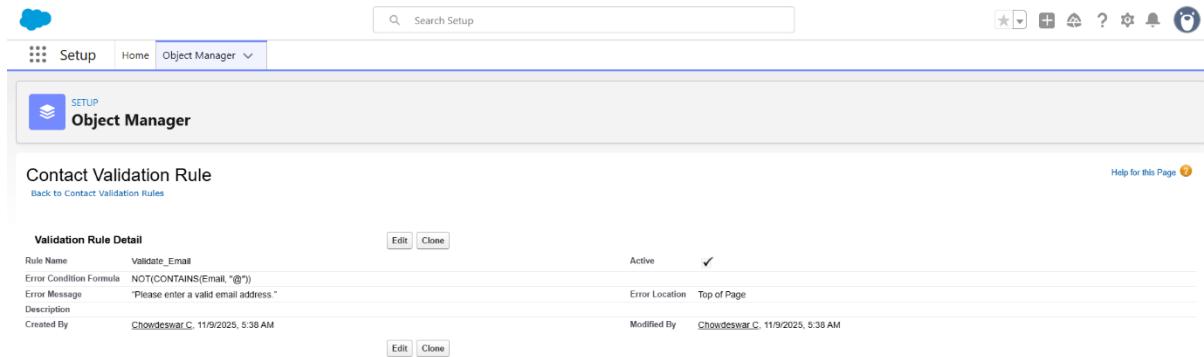
Email Alert:

Triggered when a new Contact is created — sends a welcome email to the contact’s email address (for demonstration).

Step 1: Create a Validation Rule

Purpose: Ensure valid email format.

1. Go to **Object Manager** → **Contact** → **Validation Rules** → **New**.
2. Name: `Validate_Email`.
3. Formula:
`NOT(CONTAINS(Email, "@"))`
5. Error Message: “Please enter a valid email address.”
6. Save and Activate.



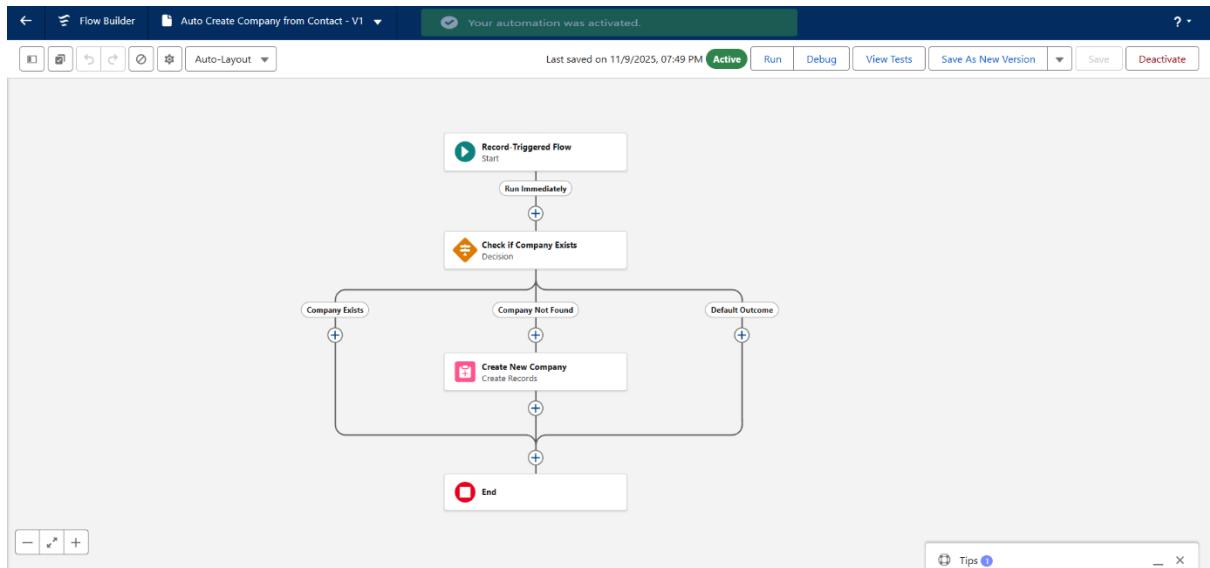
The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area is titled 'Object Manager' and shows a 'Contact Validation Rule'. The 'Validation Rule Detail' section contains the following information:

Validation Rule Detail
Rule Name: Validate_Email
Error Condition Formula: NOT(CONTAINS(Email, "@"))
Error Message: "Please enter a valid email address."
Description:
Created By: Chowdeswar.C. 11/9/2025, 5:38 AM
Active: ✓
Error Location: Top of Page
Modified By: Chowdeswar.C. 11/9/2025, 5:38 AM

Step 2: Create Flow – Auto Create Company

Goal: When a new Contact is created and the specified Company doesn't exist, create it automatically.

1. Setup → Search **Flows** → **New Flow** → Select **Record-Triggered Flow**.
2. Object: **Contact**
 - Trigger: When record is created.
3. Add an **Action Element** → Create Records → “New Company”.
4. Set Condition: If Company field is blank.
5. Map fields:
 - Company Name = Contact.LastName + “ Org”
6. Save as: **Auto Create Company Flow**.
7. Activate it.



Step 3: Create Email Alert

1. Setup → Search Email Alerts → New Email Template.
2. Template Name: NewContactWelcome.
3. Subject: “Welcome, {!Contact.FirstName}!”
4. Body: “We’re glad to have you in our CRM.”
5. Save.
6. Create Workflow Rule or Flow Action to send email on contact creation.

Email Alert Detail		Email Template
Description	New Contact Welcome Email	NewContactWelcome
Unique Name	New_Contact_Welcome_Email	Object
From Email Address	Current User's email address	Contact
Recipients	Email Field: Email	
Additional Emails		
Created By	Chodesmar.C. 11/9/2025, 6:57 AM	Modified By
	Edit Delete Clone	

Rules Using This Email Alert: This alert is currently not used by any rules.

Approval Processes Using This Email Alert: This alert is currently not used by any approval processes.

Entitlement Processes Using This Email Alert: This alert is currently not used by any entitlement processes.

Phase 5 – Apex Programming (Developer) (*Optional but adds value*)

Trigger:

Name: ContactTrigger

Description: Automatically assigns “General” as Company if no company is linked.

CODE :

```
trigger ContactTrigger on Contact (before insert) {  
    for(Contact c : Trigger.new) {  
        if(c.AccountId == null){  
            Account acc = [SELECT Id FROM Account WHERE Name='General'  
LIMIT 1];  
            c.AccountId = acc.Id;  
        }  
    }  
}
```

Phase 6 – User Interface Development

Lightning App Builder:

Created a **Custom App** named *Contact Management App* with tabs for:

- Contacts
- Companies
- Reports

Record Page:

Customized **Contact Record Page** using Lightning App Builder to show:

- Contact Details component
- Related Company component
- Activity Timeline

Home Page:

Added a dashboard component showing total contacts per company.

Step : Build Lightning App

1. Click the **App Launcher (9 dots)** → **View All** → **App Manager** → **New Lightning App**.
2. App Name: Contact Management App.
3. Add Tabs:
 - Contacts
 - Companies

- o Reports
4. Assign to all profiles.
 5. Save & Finish.

The screenshot shows a web-based contact management application. At the top, there's a navigation bar with icons for search, refresh, and other system functions. Below the bar, the title "Contact Management App" is visible, along with tabs for "Contacts" (which is selected), "Reports", and "Dashboards". A search bar is positioned above the main content area.

The main area features a blue header with various status metrics: "Total Contacts" (1), "No Activity" (0), "Idle" (0), "No Upcoming" (0), "Overdue" (0), "Due Today" (0), and "Upcoming" (0). Below this is a sub-header indicating "1 item • Filtered by Created Date, Me, Total Contacts".

The list view displays a single contact entry: "Chowdeswar c". The columns shown are Name, Title, Account Name, Last Activity, and Actions. The "Actions" column includes links for "Send Email" and "Assign Label".

Phase 7: Integration

No integrations used in this project (allowed for simple projects).

Write:

This project does not involve external API integration.

Phase 8 – Data Management & Deployment

Data Import Wizard:

Used to import sample contact data from a CSV file.

Data Export:

Enabled weekly data backup schedule.

Duplicate Rules:

Set up a duplicate rule for Email to prevent duplicate contacts.

Step — Import Sample Data

Data Import Wizard → Upload CSV for:

- Contacts
- Companies

Step 12 — Setup Data Export (Weekly Backup)

Setup → Data Export → Schedule Weekly Export.

Phase 9 – Reporting, Dashboards & Security Review

Reports:

- **Report Name:** Contacts by Company
- **Type:** Summary
- **Purpose:** Show total contacts grouped by company

Dashboard:

- **Dashboard Name:** Contact Overview Dashboard
- Components:
 - Total Contacts (metric)
 - Contacts by Company (bar chart)

Security Setup:

Security Feature	Description
Profiles	“Contact Manager” profile with CRUD access
Roles	Manager > Executive hierarchy
FLS	Restricted email edits for non-admins
Sharing Rules	Contacts visible only to same role users

Step 1: Create Report and Dashboard

1. **Reports → New Report → Contacts with Companies**
 - Group by Company Name
 - Add columns: Name, Email, Phone
 - Save as: Contacts by Company.
2. Go to **Dashboards → New Dashboard → Contact Overview Dashboard**
 - Component 1: Bar chart → Contacts by Company
 - Component 2: Metric → Total Contacts
3. Save & View Dashboard.

Dashboards

All Dashboards

2 items

	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
	Enablement Dashboard	View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.	Enablement Dashboard Spring '24	Automated Process	11/4/2025, 12:15 AM	
	Enablement Dashboard	View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.	Enablement Dashboard Summer '24	Automated Process	11/4/2025, 12:15 AM	

Reports

All Reports

30 items

	Report Name	Description	Folder	Created By	Created On	Subscribed
	Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Enablement Dashboard Reports Summer '24	Automated Process	11/4/2025, 12:15 AM	
	Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Enablement Dashboard Reports Spring '24	Automated Process	11/4/2025, 12:15 AM	
	Exercise Completion by User	Analyze how long users are spending on an exercise and the amount of progress they're making.	Enablement Dashboard Reports Summer '24	Automated Process	11/4/2025, 12:15 AM	
	Exercise Completion by User	Analyze how long users are spending on an exercise and the amount of progress they're making.	Enablement Dashboard Reports Spring '24	Automated Process	11/4/2025, 12:15 AM	
	Exercise Completion Status	Analyze how long users take to complete an exercise and their completion percentage.	Enablement Dashboard Reports Spring '24	Automated Process	11/4/2025, 12:15 AM	
	Exercise Completion Status	Analyze how long users take to complete an exercise and their completion percentage.	Enablement Dashboard Reports Summer '24	Automated Process	11/4/2025, 12:15 AM	
	Exercise Completion Status by Section	Analyze an exercise's completion status based on program sections.	Enablement Dashboard Reports Summer '24	Automated Process	11/4/2025, 12:15 AM	

Step 2: Security Settings

1. Setup → Profiles → Contact Manager Profile → Object Permissions:
 - Read/Create/Edit for Contact
 - Read for Company
2. Setup → Roles
 - Manager → Sales Executive hierarchy
3. Setup → Sharing Settings
 - Contacts: Controlled by Role Hierarchy

Phase 10 – Quality Assurance Testing

Test Case	Input	Expected Output	Actual Output	Status
Create Contact	Name + Email	Contact saved successfully	As expected	Passed
Invalid Email	Missing “@”	Error message displayed	As expected	Passed
Auto Company Creation	Contact with new company name	Company auto-created	As expected	Passed
Duplicate Email	Same email repeated	Duplicate prevented	As expected	Passed

Step: Test Everything

1. Create a new Contact:
 - o Name: Ramesh Kumar
 - o Email: ramesh@example.com
 - o Company: TechNova
2. Observe:
 - o If company *TechNova* doesn't exist → auto-created
 - o Invalid email → error
 - o Duplicate email → blocked

Output Email:

The screenshot shows a Gmail inbox with a search bar at the top containing "in:spam". There are 1,310 messages in total. On the left, a sidebar shows navigation links like Compose, Inbox, Starred, Snoozed, Sent, Drafts, Purchases, Less, Important, Scheduled, All Mail, and Spam. The Spam folder is selected and has 1 message. The main area displays an email from "Chowdeswar C <Onirlia4xd1.gk-eueb7ud.can96.bnc.salesforce.com>" with the subject "Welcome". A tooltip box over the message body says "Why is this message in spam? This message is similar to messages that were identified as spam in the past." with a "Report as not spam" button. Below the message are standard reply, forward, and delete buttons.