

End to End Salesforce CRM Implementation with Admin, Development & Community

This document consolidates all phases (1 to 10) of the project 'End to End Salesforce CRM Implementation with Admin, Development & Community'. It demonstrates the complete lifecycle from problem understanding to deployment, reporting, and security review, covering Admin, Developer, and Community aspects of Salesforce CRM.

Phase 1: Problem Understanding & Industry Analysis

Includes problem statement, requirement gathering, stakeholder analysis, business process mapping, use case analysis, and AppExchange exploration.

Phase 2: Org Setup & Configuration

Covers Salesforce org setup, company profile, business hours, fiscal year, users, roles, profiles, permission sets, OWD, sharing rules, and security policies.

Phase 3: Data Modeling & Relationships

Includes design of standard and custom objects, fields, record types, page layouts, compact layouts, schema builder relationships, and external objects.

Phase 4: Process Automation (Admin)

Validation rules, workflows, process builder, approval process, flows, email alerts, field updates, tasks, and custom notifications to automate CRM processes.

Phase 5: Apex Programming (Developer)

Apex classes, triggers, design patterns, SOQL/SOSL, collections, control statements, batch apex, queueable, scheduled jobs, exception handling, and test classes.

Phase 6: User Interface Development (UI)

Lightning App Builder, record pages, custom tabs, home page layouts, utility bar, Lightning Web Components (LWC), navigation service, and event handling.

Phase 7: Integration & External Access

Integration with SMS provider and payment gateway using Named Credentials, REST callouts, custom metadata, test mocks, provider webhook, and platform events.

Phase 8: Data Management & Deployment

Data Import Wizard, Data Loader, duplicate rules, data export and backup, deployment using Change Sets, VS Code with SFDX, and package management.

Phase 9: Reporting, Dashboards & Security Review

Reports (tabular, summary, matrix, joined), dashboards (bar, line, donut, tables), security review (OWD, FLS, IP restrictions, audit trail).

Phase 10: Final Deployment & Handover

Final migration to production, user training, documentation handover, support plan, and project closure with feedback collection.

Overall Project Outcome

The project successfully implemented an End-to-End Salesforce CRM with Admin, Development, and Community capabilities. All key business processes, from lead management to enrollment, payment integration, automation, reporting, and security, were designed and deployed. The system is now production-ready, scalable, and secure for future enhancements.