

# Practical No: 04

**Practical Title:** Design and develop custom Application (Mini Project) using Salesforce Cloud.

## Objectives:

- To learn salesforce cloud administration
- To install and configure the salesforce cloud administrative features

## Hardware Requirements:

- Pentium IV with latest configuration

## Software Requirements:

- Ubuntu 20.04, Web application i.e. salesforce.com

## Theory:

### Introduction

Salesforce.com Inc. is an American cloud-based software company headquartered in San Francisco, California. Though the bulk of its revenue comes from a customer relationship management (CRM) product, Salesforce also sells a complementary suite of enterprise applications focused on customer service, marketing automation, analytics and application development.

Salesforce is the primary enterprise offering within the Salesforce platform. It provides companies with an interface for case management and task management, and a system for automatically routing and escalating important events. The Salesforce customer portal provides customers the ability to track their own cases, includes a social networking plug-in that enables the user to join the conversation about their company on social networking websites, provides analytical tools and other services including email alert, Google search, and access to customers' entitlement and contracts.

### Lightning Platform

Lightning Platform (also known as Force.com) is a platform as a service (PaaS) that allows developers to create add-on applications that integrate into the main Salesforce.com application. These third-party applications are hosted on Salesforce.com's infrastructure. Force.com applications are built using declarative tools, backed by Lightning and Apex (a proprietary Java-like programming language for Force.com) and Lightning and Visual force (a framework that includes an XML syntax typically used to generate HTML). The Force.com platform typically receives three complete releases a year. As the platform is provided as a service to its developers, every single development instance also receives all these updates.

## **Community Cloud**

Community Cloud provides Salesforce customers the ability to create online web properties for external collaboration, customer service, channel sales, and other custom portals in their instance of Salesforce. Tightly integrated to Sales Cloud, Service Cloud, and App Cloud, Community Cloud can be quickly customized to provide a wide variety of web properties. Salesforce Sales Cloud is a customer relationship management (CRM) platform designed to support sales, marketing and customer support in both business-to-business (B2B) and business-to-customer (B2C) contexts. Sales Cloud is a fully customizable product that brings all the customer information together in an integrated platform that incorporates marketing, lead generation, sales, customer service and business analytics and provides access to thousands of applications through the AppExchange. The platform is provided as Software as a Service (SaaS) for browser-based access; a mobile app is also available. A real time social feed for collaboration allows users to share information or ask questions of the user community. Salesforce.com offers five versions of Sales Cloud on a per-user, per month basis, from lowest to highest: Group, Professional, Enterprise, Unlimited and Performance. The company offers three levels of support contracts: Standard Success Plan, Premier Success Plan and Premier+ Success Plan.

## **Create Custom Apps for Salesforce Classic**

Create custom apps to give your Salesforce Classic users' access to everything they need all in one place.

If you're new to custom apps, we recommend using Lightning Platform quick start to create an app. With this tool, you can generate a basic working app in just one step.

If you've already created the objects, tabs, and fields you need for your app, follow these steps. With this option, you create an app label and logo, add items to the app, and assign the app to profiles.

1. From Setup, enter Apps in the Quick Find box, then select Apps.
2. Click New.
3. If the Salesforce console is available, select whether you want to define a custom app or a Salesforce console.
4. Give the app a name and description.

An app name can have a maximum of 40 characters, including spaces.

5. Optionally, brand your app by giving it a custom logo.
6. Select which items to include in the app.
7. Optionally, set the default landing tab for your new app using the Default Landing Tab drop-down menu below the list of selected tabs. This determines the first tab a user sees when logging into this app.

8. Choose which profiles the app will be visible to.
9. Check the Default box to set the app as that profile's default app, meaning that new users with the profile see this app the first time they log in. Profiles with limits are excluded from this list.
10. Click Save

**What is the difference between custom application and console application in sales force?**

A custom application is a collection of tabs, objects etc that function together to solve a particular problem.

A console application uses a specific Salesforce UI - the console. Console applications are intended to enhance productivity by allowing everything to be done from a single, tabbed, screen.

**Conclusion:**

Thus, we have designed and developed custom application using salesforce cloud.