

Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Phase 1: Problem Understanding & Industry Analysis

- Requirement Gathering
- Stakeholder Analysis
- Business Process Mapping
- Industry-specific Use Case Analysis
- AppExchange Exploration

Phase 2: Org Setup & Configuration

- Salesforce Editions
- Company Profile Setup
- Business Hours & Holidays
- Fiscal Year Settings
- User Setup & Licenses
- Profiles
- Roles
- Permission Sets
- OWD
- Sharing Rules
- Login Access Policies
- Dev Org Setup
- Sandbox Usage
- Deployment Basics

Phase 3: Data Modeling & Relationships

- Standard & Custom Objects
- Fields
- Record Types
- Page Layouts
- Compact Layouts
- Schema Builder
- Lookup vs Master-Detail vs Hierarchical Relationships
- Junction Objects

- • External Objects

Phase 4: Process Automation (Admin)

- • Validation Rules
- • Workflow Rules
- • Process Builder
- • Approval Process
- • Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)
- • Email Alerts
- • Field Updates
- • Tasks
- • Custom Notifications

Phase 5: Apex Programming (Developer)

- • Classes & Objects
- • Apex Triggers (before/after insert/update/delete)
- • Trigger Design Pattern
- • SOQL & SOSL
- • Collections: List, Set, Map
- • Control Statements
- • Batch Apex
- • Queueable Apex
- • Scheduled Apex
- • Future Methods
- • Exception Handling
- • Test Classes
- • Asynchronous Processing

Phase 6: User Interface Development

- • Lightning App Builder
- • Record Pages
- • Tabs
- • Home Page Layouts
- • Utility Bar
- • LWC (Lightning Web Components)
- • Apex with LWC
- • Events in LWC
- • Wire Adapters
- • Imperative Apex Calls

- • Navigation Service

Phase 7: Integration & External Access

- • Named Credentials
- • External Services
- • Web Services (REST/SOAP)
- • Callouts
- • Platform Events
- • Change Data Capture
- • Salesforce Connect
- • API Limits
- • OAuth & Authentication
- • Remote Site Settings

Phase 8: Data Management & Deployment

- • Data Import Wizard
- • Data Loader
- • Duplicate Rules
- • Data Export & Backup
- • Change Sets
- • **Unmanaged vs Managed Packages**
- • ANT Migration Tool
- • VS Code & SFDX

Phase 9: Reporting, Dashboards & Security Review

- • Reports (Tabular, Summary, Matrix, Joined)
- • Report Types
- • Dashboards
- • Dynamic Dashboards
- • Sharing Settings
- • Field Level Security
- • Session Settings
- • Login IP Ranges
- • Audit Trail

Phase 10: Final Presentation & Demo Day

- • Pitch Presentation
- • Demo Walkthrough

- • Feedback Collection
- • Handoff Documentation
- • LinkedIn/Portfolio Project Showcase

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🧠 **Project Title: "Smart Property Portal – Real Estate Customer Engagement & Lead Conversion System"**

- 📌 **Industry: Real Estate**
 - 📌 **Project Type: B2C Salesforce CRM implementation**
 - 📌 **Target Users: Sales Agents, Property Managers, and Prospective Buyers**
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- ✅ **Problem Statement**

- A real estate firm receives thousands of property inquiries via its website, offline listings, and social media. However, lead follow-up is slow, tracking property visits is manual, and sales agents cannot effectively prioritize high-intent buyers.

- To address this, the company wants to implement a Salesforce CRM to:
 - Automate lead capture and qualification
 - Manage properties and visit schedules
 - Track customer interests and purchase history
 - Enable real-time dashboards for management
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- 🌱 **Use Cases**

- **Lead Management**

- Automatically capture leads from web forms and social channels
- Assign leads to agents based on territory
- Qualify leads based on interest score

- **Property Management**

- Maintain inventory of available properties with location, price, and features
- Track visit schedules and status updates

- **Visit Scheduling**

- Allow agents to schedule property visits
- Send SMS/email confirmations to customers

- **Deal Closure**

- Update deal status with offer, negotiation, and closure details
- Capture booking amount and documents

- **Reporting**

- Dashboard for monthly sales performance
 - Lead funnel and agent activity tracking
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