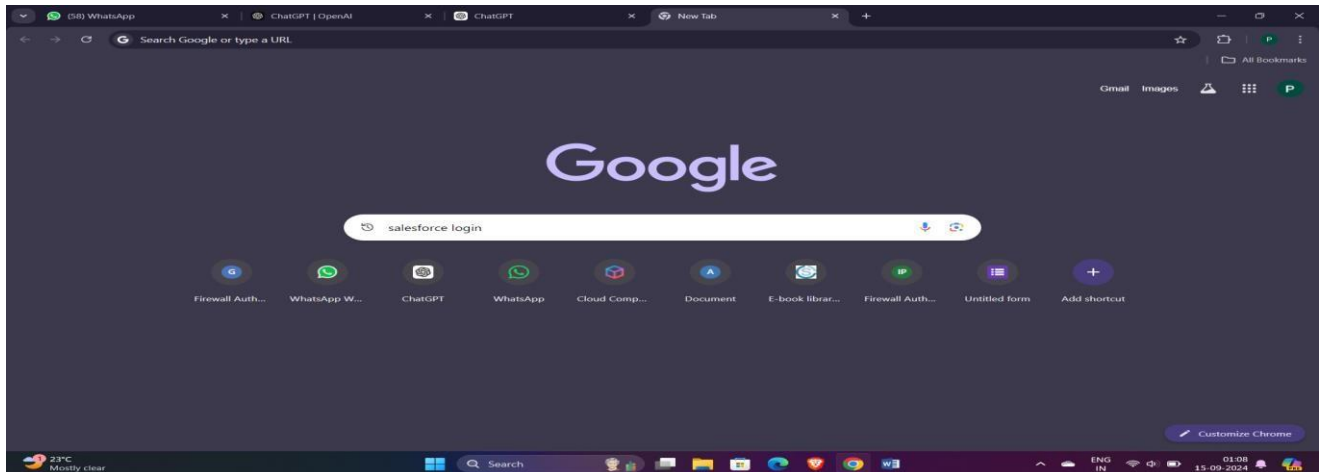


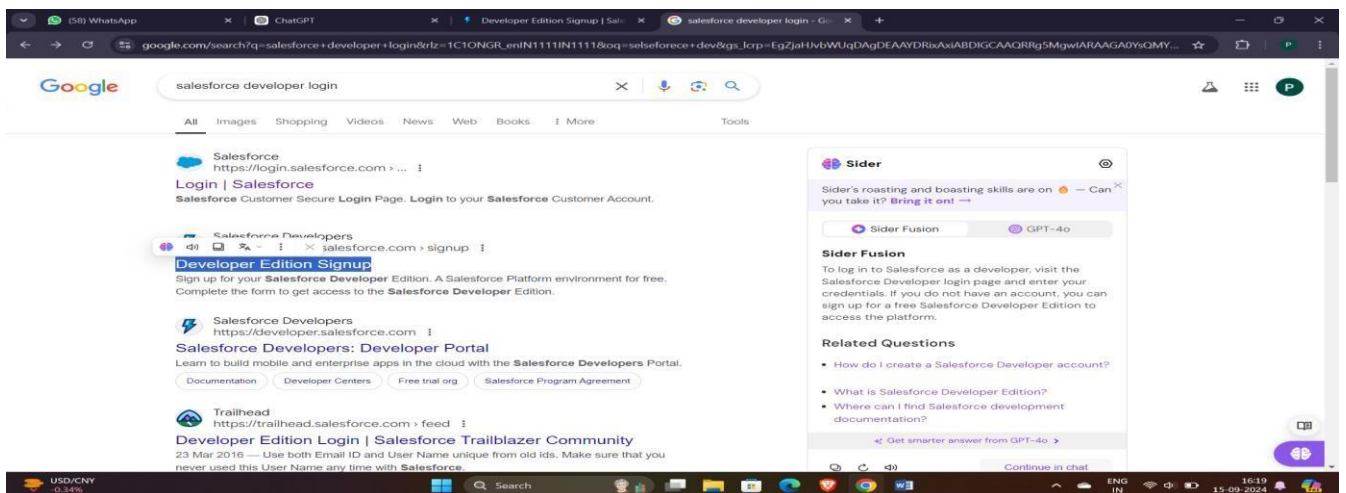
**Title: Introduction to Cloud CRM (Salesforce).**

## **1: Create a Salesforce Developer Account**

**Step1: Go to Google Chrome.**



**Step 2: Search for “Developer Edition Signup” on a browser and click on the official link**



### Step 3: Fill in your details:

1. First Name
2. Last Name
3. Email (Use a valid email address)
4. Job Title (Choose "Student" or leave it blank if not applicable)
5. Company (Use "Self" if not part of a company)
6. Country

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Sign up for your Salesforce Developer Edition  
A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name\*  
Your first name

Last Name\*  
Your last name

Email\*  
Your email address

Role\*  
Your job role

Company\*  
Company Name

Country/Region\*  
Country/Region

Postal Code\*  
Postal Code

Sign me Up

Already have a Salesforce Developer Environment?  
Log in

### Step 4: Click on: "Sign Me Up" (Right side button)

Postal Code\*  
Your postal code

Username\*  
jane@company.sandbox

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations.

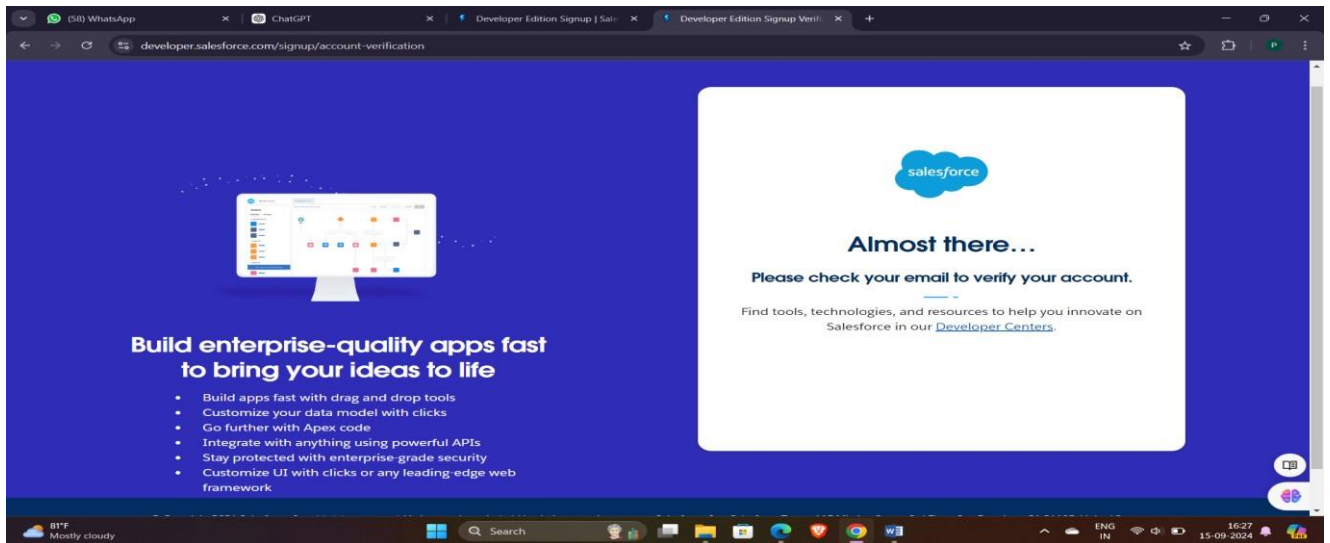
☒ I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement.

Log in

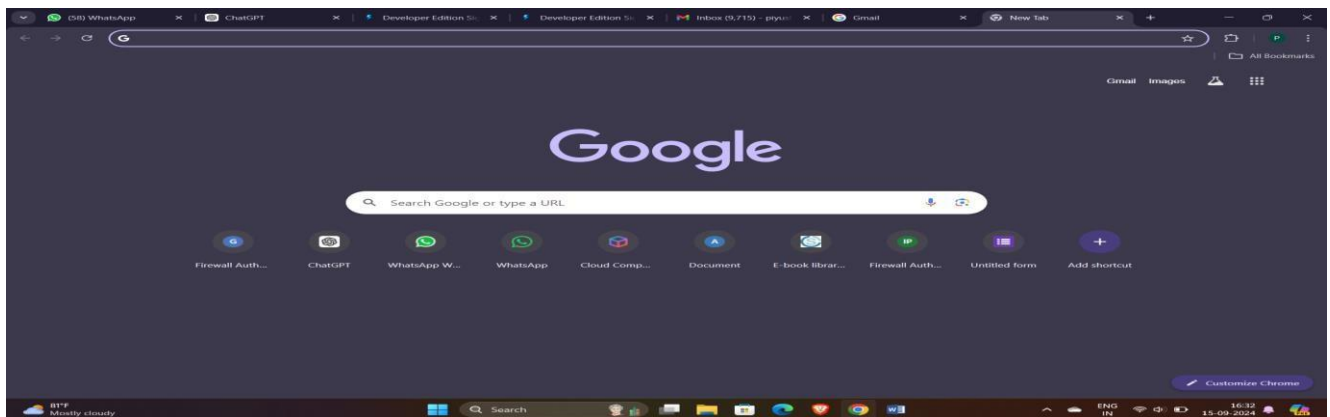
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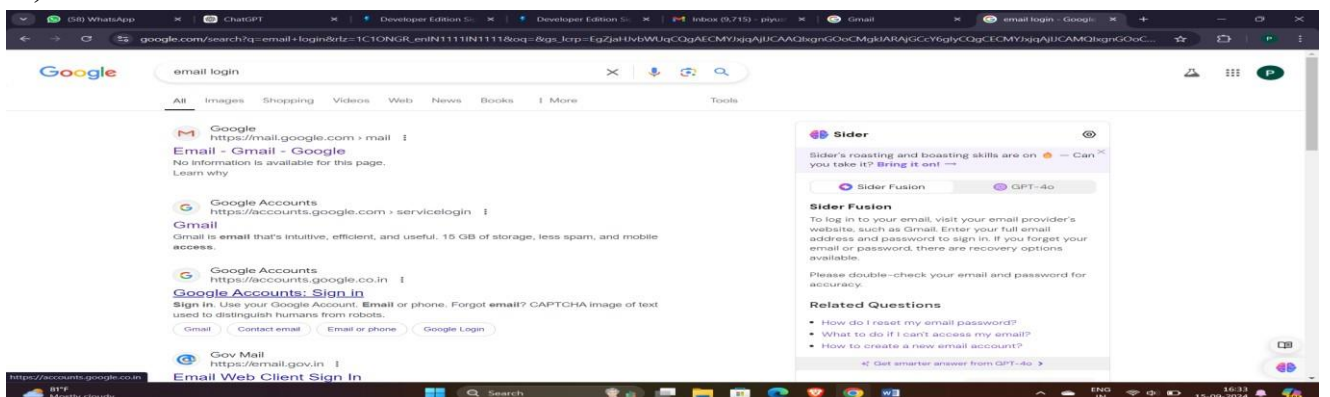
### Step 5: Verify your email:



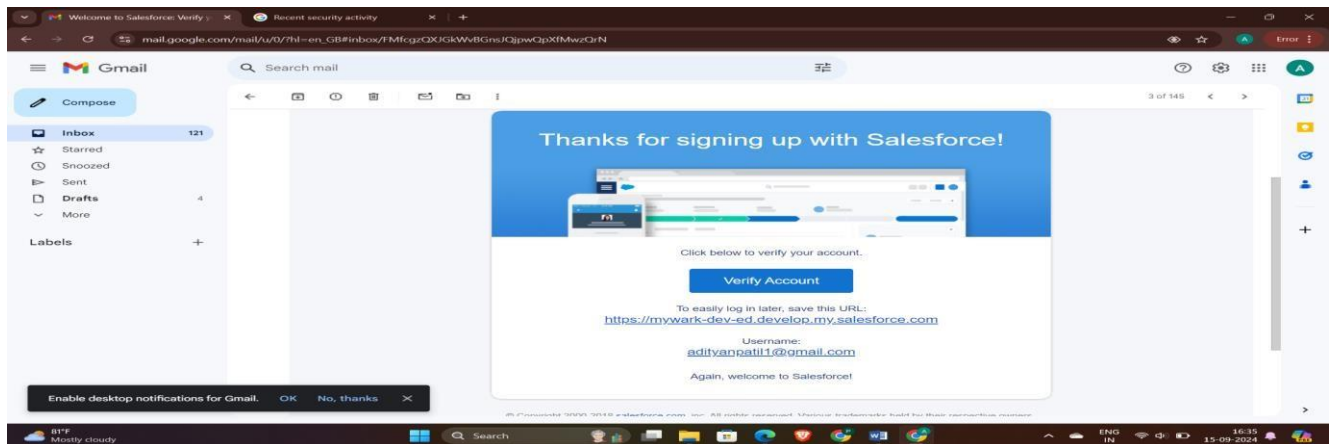
**A) Go to Google Chrome.**



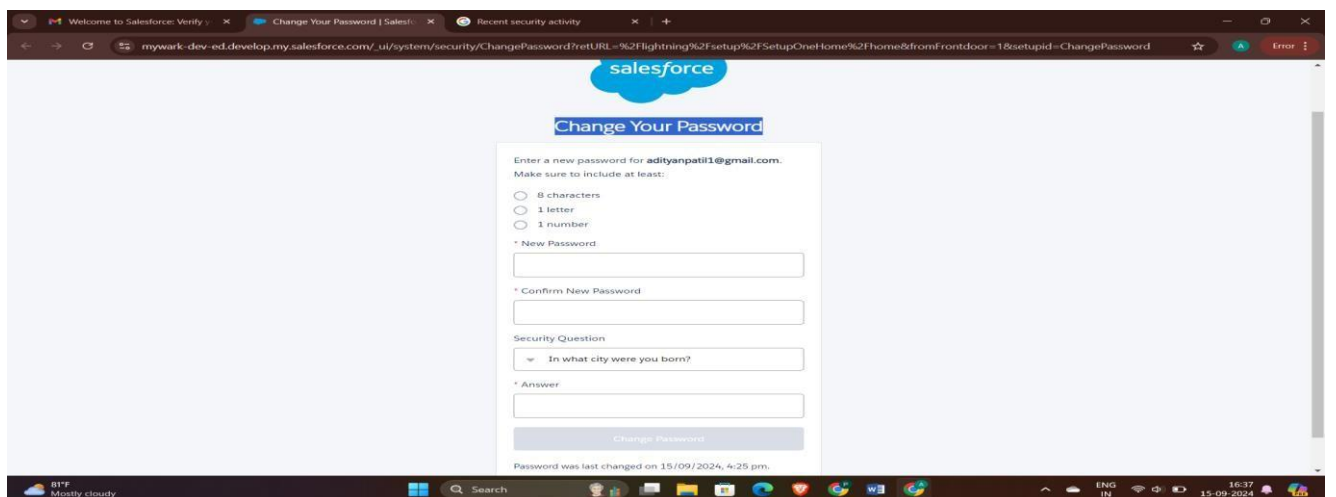
B) Search for “Email” on a browser and click on the official link



C) Check your inbox for the verification email from Salesforce.

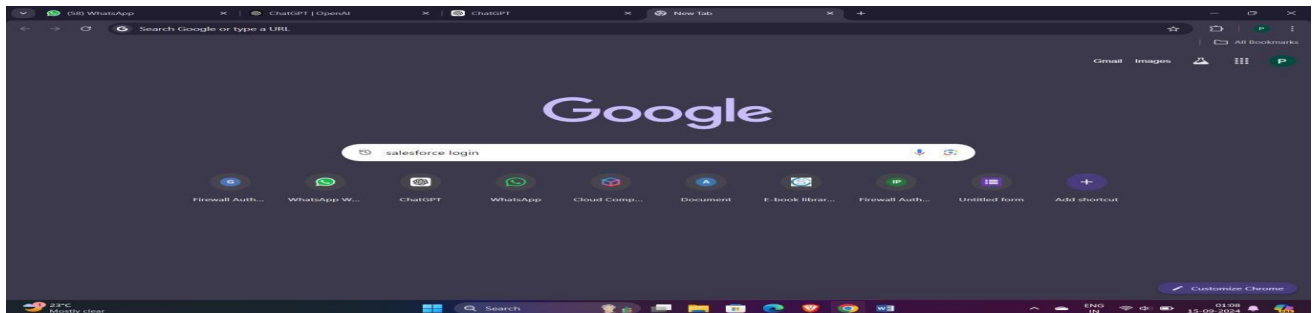


D) Click on the link in the email to verify your account.( Change Your Password )

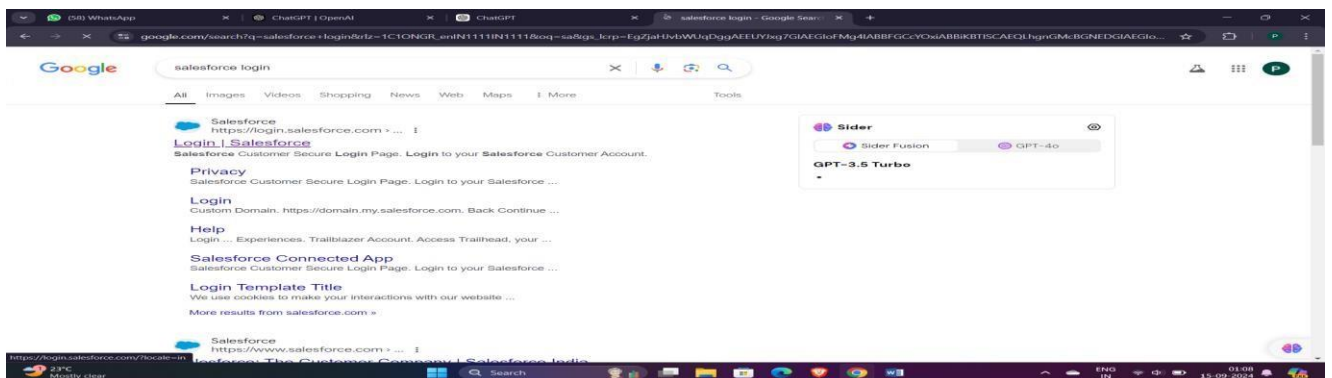


## 2: Log into Salesforce Developer Account

### Step1: Go to Google Chrome.

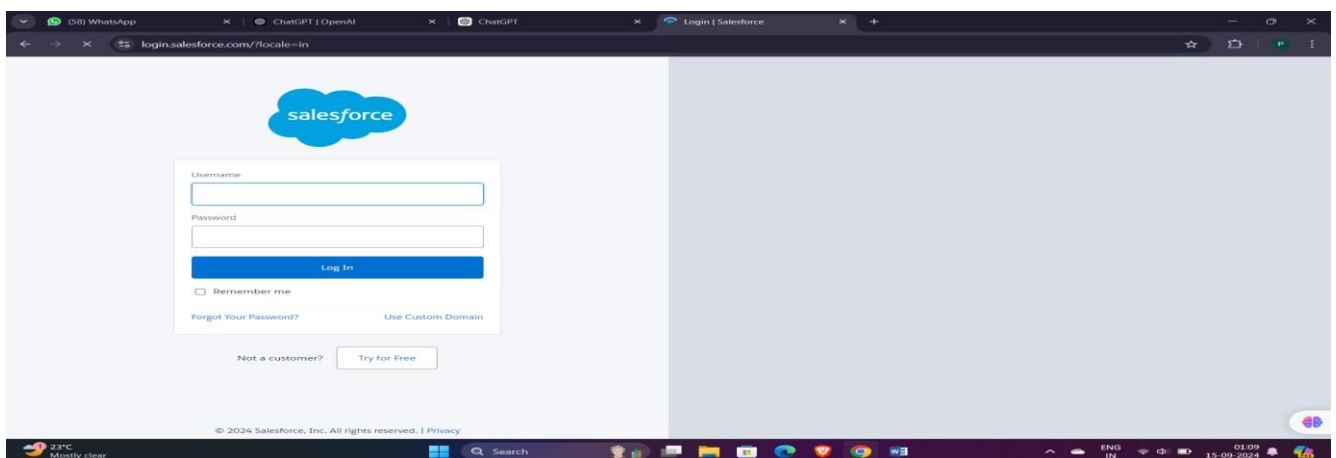


### Step 2: Search for “ Salesforce login ” on a browser and click on the official link



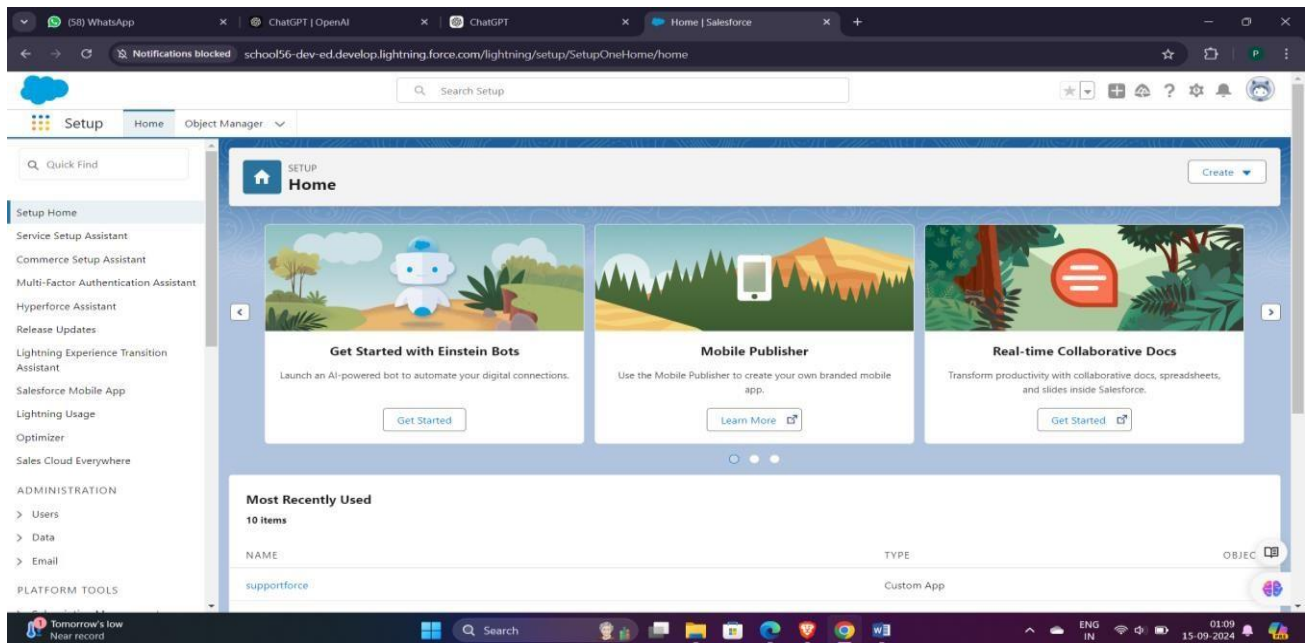
### Step 3: Enter your

- Username (email you used for signing up)
- Password

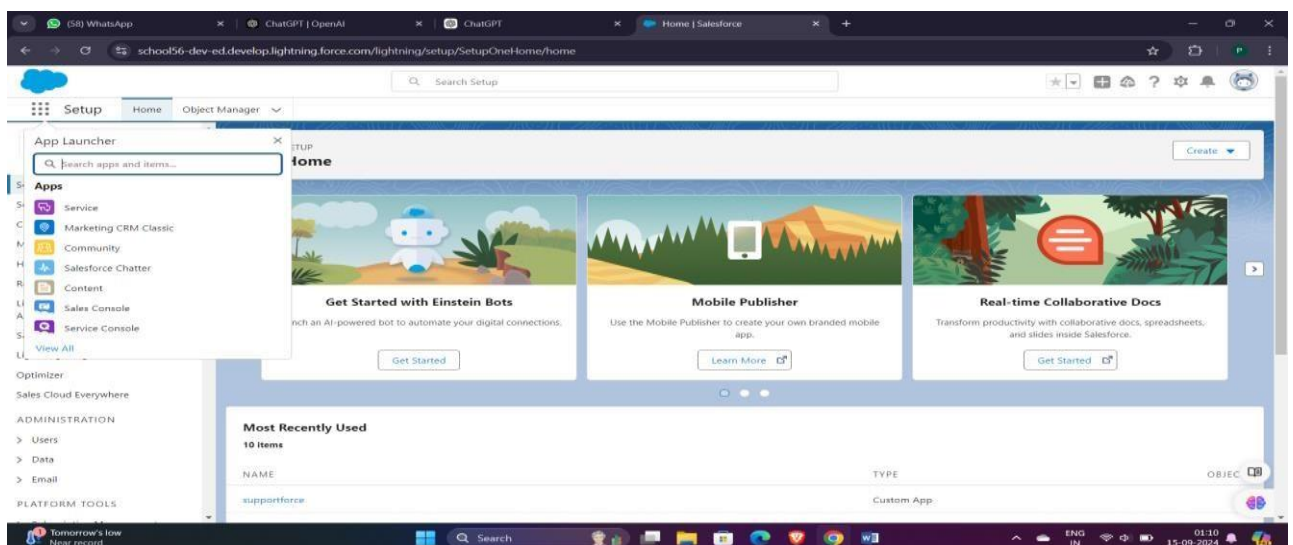


### 3: Understand the Salesforce Interface

**Step 1:**Enter Salesforce: Once logged in, you'll be in your Salesforce environment.

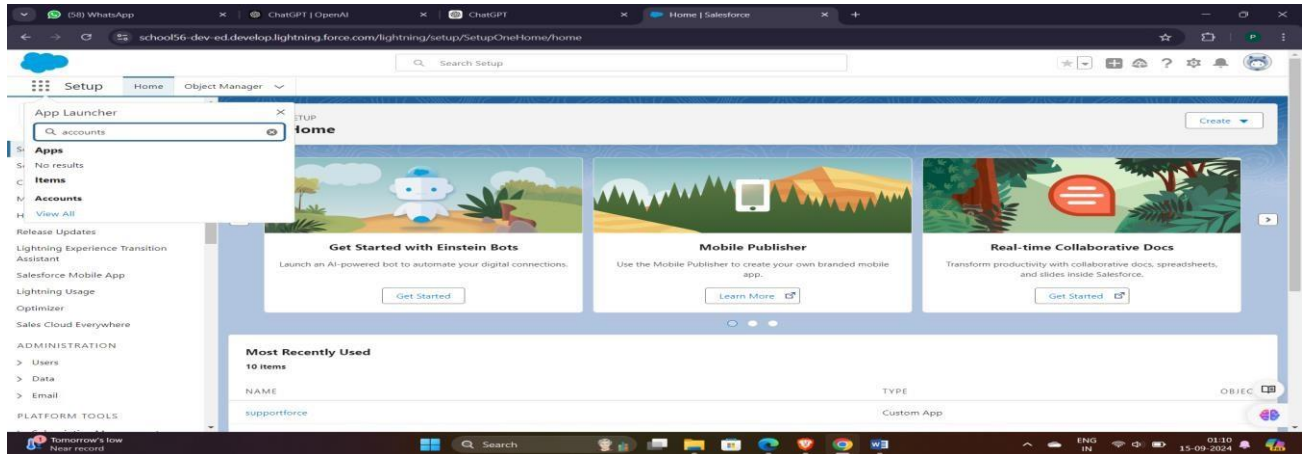


**Step 2:**Go to the App Launcher: On the top left, you'll see the App Launcher (the icon with 9 dots).

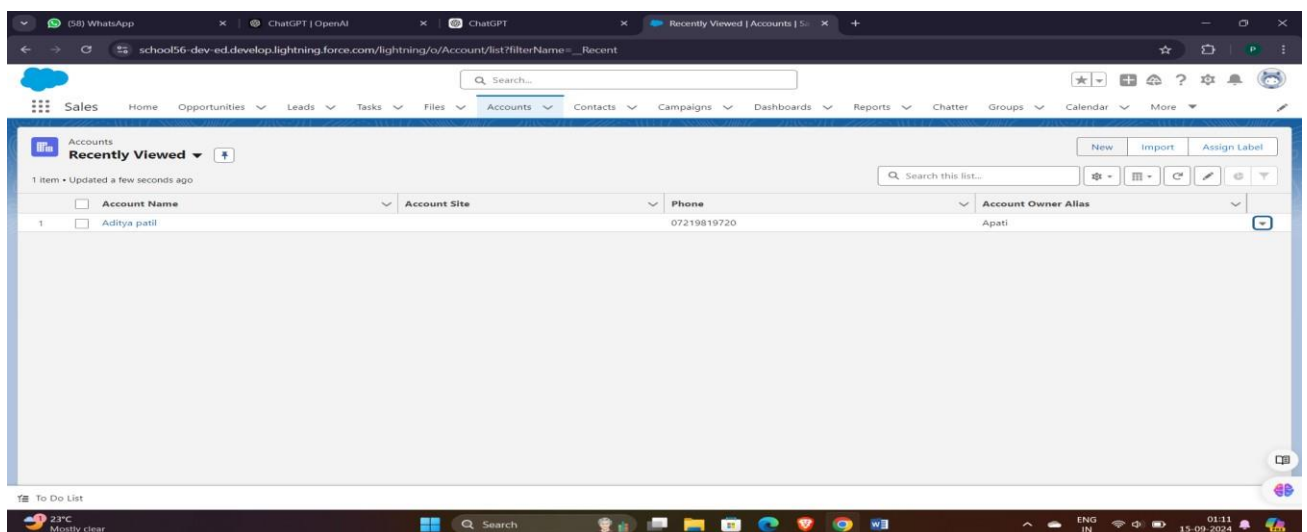




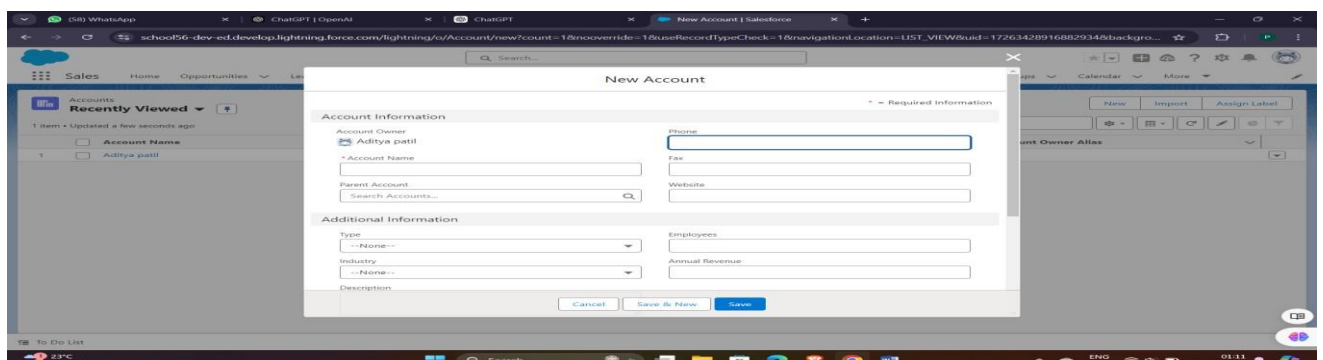
**Step 3: Search for "Accounts":** In the search bar within the App Launcher, type "Accounts" and select it.



**Step 4: Create a New Account:** Once you're in the Accounts section, click on the "New" button to create a new account.



**Step 5: Fill in Account Information:** Provide the account details



**Step 6: Save the New Account:** After filling out the account details, click "Save" to create the new account.

**Step 7 :Open the New Account:** Once saved, you'll be taken to the new account's page.

**Step 8: Create a New Contact:** In the account's details page, look for the "Contacts" section and click "New" to add a new contact.



**Step 9 :Fill in Contact Information:** Enter the contact details, like:

The screenshot shows the 'New Contact' form in Salesforce. The form is titled 'New Contact' and has a 'Cancel' button and a 'Save' button. The form fields are as follows:

- \* Name: Salutation (dropdown menu with 'Mr.' selected), First Name, Last Name
- Email: (text input)
- Phone: (text input)
- Account Name: (dropdown menu with 'bca practical 6' selected)

The background shows the Salesforce interface with the 'bca practical 6' account selected. The 'Related' section shows 'We found no potential duplicates', 'Contact Point Addresses (0)', 'Cases (0)', 'Partners (0)', and 'Notes & Attachments (0)'.

**Step 10 : Send an Email:** In the new contact's page, go to the "Activity" section on the right side.

The screenshot shows the 'bca practical 6' account page in Salesforce. The page is titled 'bca practical 6' and has a 'Follow' button, an 'Edit' button, and buttons for 'New Contact' and 'New Opportunity'. The page is divided into two main sections: 'Details' and 'Activity'.

The 'Details' section contains the following information:

- Account Owner: Aditya patil
- Account Name: bca practical 6
- Parent Account: (empty)
- Additional Information: Type (Other), Employees (12), Industry (Banking), Annual Revenue (₹1,22,33,34,444), Description (we can do that)
- Address Information: Billing Address (parola), Shipping Address (jalgaon ssbt)

The 'Activity' section is on the right side of the page. It has a 'Chatter' tab and a 'Filters' section. The 'Filters' section shows 'All time', 'All activities', and 'All types'. Below the filters, there is a section for 'Upcoming & Overdue' activities, which currently shows 'No activities to show. Get started by sending an email, scheduling a task, and more.' and 'No past activity. Past meetings and tasks marked as done show up here.'

**Step 11 :**Here, you'll see an option to send an email.

The screenshot shows the 'bca practical 6' account page in Salesforce, similar to the previous screenshot. The 'Activity' section is open, and a dropdown menu is visible. The dropdown menu has the following options:

- Add Email to To Do List
- Send with Gmail
- Set My Email Preferences

The background shows the same Salesforce interface as the previous screenshot, with the 'bca practical 6' account selected.

**Step 12:** Here, send an email to Contact.

