Guidelines for Salesforce Project Documentation And Demo Video Presentation

Project Documentation:

Project documentation in a Salesforce CRM implementation serves as a comprehensive record of the application's purpose, design, development, and deployment. It ensures that business requirements are clearly defined and aligned with the system's functionality. Documentation acts as a blueprint for developers and admins, guiding consistent development and future scalability. It supports user training, facilitates troubleshooting, and ensures smooth maintenance by detailing every component and its logic. Moreover, it aids in change management, audit compliance, and knowledge transfer, making it an essential asset for the successful execution and long-term sustainability of any Salesforce CRM project.

Guidelines for Salesforce Documentation Submission:

General Instructions:

- Submit the documentation in a **professional format** (preferably in Word or PDF).
- Use **clear headings**, **subheadings**, and **bullet points** for easy reading.
- Follow a **consistent font style and size** (e.g., Times New Roman, size 12 or 13).
- Ensure **no grammatical mistakes** and **proper alignment** of all sections.
- Plagiarism is strictly prohibited — your content must be **original**.

Mandatory Sections to Include:

Project Overview:

A brief paragraph summarizing what your project CRM is about.
Highlight the key features and business needs for the CRM.

Objectives:

Write a paragraph clearly stating the main goals of building the CRM.

Link the objectives to business value (e.g., better customer management, streamlined bookings).

Phase 1:Requirement Analysis & Planning

- Understanding Business Requirements: Summarize the user needs and problems being solved.
- Defining Project Scope and Objectives: Add detailed points.
- Design Data Model and Security Model
- Stakeholders Mapping
- Execution RoadMap.

Phase 2:Salesforce Development - Backend & Configurations

- Setup environment & DevOps workflow
- Customization of Objects, Fields, Validation Rules, Automation (Workflow Rules, Process Builder, Flows, Approval Process).
- Apex Classes, Triggers, Asynchronous Apex Classes (if developed, explain briefly).
- Screenshots for each Salesforce Concepts developed are mandatory.

Phase 3:UI/UX Development & Customization

- Lightning App setup through App Manager.
- Page Layouts, Dynamic Forms.
- User Management.
- Reports and Dashboards.
- LWC development if any (for bonus points).
- Lightning Pages
- Screenshots for each Salesforce Concepts developed are mandatory.

Phase 4:Data Migration, Testing & Security

- Mention the data loading process (e.g., Data Import Wizard, Data Loader).
- Field History Tracking, Duplicate Rules, Matching Rules should be documented.
- Profiles, Roles and Role Hierarchy, Permission sets, Sharing Rules.
- Creation of Test Classes
- Screenshots for each Salesforce Concepts developed are mandatory.

- Preparation of **test cases** for each and every salesforce features like booking creation, Approval Process, Automatic Task creation, flows, triggers etc must be submitted along with input and output Screenshots . **Note: Just don't mention the test is passed in tabular format. Screenshots are mandatory.**

Phase 5:Deployment, Documentation & Maintenance

- Explain the Deployment strategy (change sets or other methods).
- Basic description of how the system will be maintained and monitored.
- Documentation of troubleshooting approach.

Conclusion (Include Conclusion of the Project**)**

Additional Points:

- In the documentation, provide only the necessary details required to create objects, flows, and other Salesforce components — avoid including step-by-step implementation instructions.
- Include **screen captures** of Salesforce Setup/configurations where relevant (for each and every Salesforce Features).
- Briefly describe **validation rules**, **approval processes**, **automation flows, etc** created.
- Include the **Testing Approach** (how testing was done for flows, reports, etc.).
- **Mention future enhancements** (like adding chatbot integration or AI suggestions in future).

Guidelines for Salesforce Project Demo Video Presentation:

The Project Demo Video Presentation is a crucial part of any Salesforce CRM project, as it showcases the complete functionality and implementation of the application in a clear, visual, and practical manner. It allows stakeholders, mentors, or evaluators to understand how the project works from both the user interface and backend perspectives, including automations, validations, and data handling. A well-prepared demo video not only demonstrates the technical skills of the developer but also reflects their ability to communicate effectively, organize information, and present business solutions. It serves as proof that the features built are functioning as intended, tested thoroughly, and aligned with user requirements, making it an essential deliverable in project assessments and real-world implementations.

Here are clear and structured steps to follow for a Project Demo Video Presentation for a Salesforce CRM application, covering both User Interface and Backend Implementation:

Salesforce CRM Project Demo – Steps

1. **Introduction**
   - Introduce yourself and the project name.
   - Briefly explain the business goal and tools used.
2. **App Overview**
   - Show the custom app in App Launcher.
   - Mention the key standard and custom objects used.
3. **User Interface Demonstration**
   - Demonstrate record creation in key objects (e.g., Customer, Booking, Payment).
   - Show field dependencies, validation rules, dynamic forms.
4. **Business Process Automation**
   - Show flows, workflow rules, and process builders.
   - Demonstrate approval process if applicable.
   - Open and explain custom Apex triggers and asynchronous processes.
5. **Reports & Dashboards**
   - Present key reports and dashboards used for analytics.
6. **User Management & Security**
   - Show profiles, permission sets, and field-level security.

- Mention role hierarchy and field history tracking.

7. **Error Handling & Debugging**
    - Briefly show debug logs or how issues were resolved.
8. **Highlights**
    - Point out unique features or automations developed.
9. **Conclusion**
    - Summarize the features built.
    - Confirm the project was tested and documented.

Pro Tips for Project Demo Video

1. **Use Your Own Voice – No Silent Videos**
    - Explain everything clearly in your **own words** as you present.
    - **Voiceover is compulsory** to showcase your understanding and communication.
2. **Keep It Within 5–10 Minutes**
    - Be concise and focused. Avoid lengthy clicks or pauses.
    - Respect the viewer's time while covering all key points.
3. **Practice Before Recording**
    - Rehearse the demo to avoid mistakes and ensure smooth delivery.
    - Keep sample data and records ready in advance.
4. **Keep Your Screen Resolution Clear**

- Record in **HD (720p or higher)** to ensure all text and screens are visible.

5. **Avoid Background Noise**
   - Choose a quiet environment and use a good-quality microphone or headset.
6. **Use Clear Navigation and Slow Cursor Movement**
   - Move your cursor slowly and deliberately while navigating through the app.
7. **Use Bookmarked Tabs or Shortcuts**
   - Have all necessary pages/tabs open in advance to avoid delays or loading time.
8. **Use a Logical Presentation Flow**
   - Follow a structured order: *Introduction → UI → Automations → Reports → Security → Summary.*
9. **Show Functional Features with Real Examples**
   - Demonstrate flows, validation rules, triggers, and reports using test data.
10. **Showcase Unique Features or Highlights**
    - Point out customizations like LWC, dynamic forms, or scheduled flows that make your project stand out.
11. **End with a Confident Summary**
    - Recap what you built, its purpose, and its benefits to the end user or business.
12. **Record Using Reliable Tools**
    - Recommended tools: **Google meet, Loom**, **OBS Studio**, or **Zoom screen recording**.
13. **Save & Share Responsibly**

- Upload your demo to **Google Drive**, **YouTube (Unlisted)**, or any platform suggested by your mentor or team.