

Problem Statement:-

In today's competitive business environment, many organizations still rely on manual processes and disconnected systems to manage their customer data, sales activities, and service operations. This leads to inefficiencies such as delayed responses, data duplication, lack of visibility, and reduced customer satisfaction.

The objective of this Salesforce project is to design and implement a centralized CRM solution that streamlines business operations through process automation, structured data modeling, and secure access control.

Challenges:

- No centralized system for managing leads, customers, or service requests
- Manual data entry causing delays and errors
- Lack of real-time reporting and analytics
- Limited automation for approvals and notifications

Salesforce Solution:

- Org Setup and Configuration
- Data Modeling (Objects & Fields)
- Process Automation (Flows, Process Builder)
- Apex Triggers for advanced logic
- Lightning Web Components for UI
- Reports and Dashboards for analytics
- Proper roles, profiles, and sharing rules for security

This project is part of the TCS Lastmile Salesforce training and showcases both Admin and Developer skills.