

# Salesforce Advanced Project Documentation

This document provides a detailed plan for building a full-scale Salesforce project covering all 10 phases of the development lifecycle. This project is suitable for including in a resume, demonstrating expertise across configuration, automation, development, and deployment.

## Phase 1: Problem Understanding & Industry Analysis

Research the chosen industry (e.g., Real Estate, Healthcare, Education). Define key business challenges, stakeholders, and goals. Document business requirements in a BRD (Business Requirement Document).

## Phase 2: Org Setup & Configuration

Set up My Domain, enable MFA, create users and roles for Admin, PM, Developers, and Clients. Configure profiles and permission sets. Ensure security model is aligned with business needs.

## Phase 3: Data Modeling & Relationships

Design a data model using standard and custom objects. Define relationships (lookup/master-detail), fields, record types, and page layouts. Create ERD diagrams.

## Phase 4: Process Automation (Admin)

Use Flow Builder, Approval Processes, and Validation Rules to automate business logic. Minimize code usage where declarative automation suffices.

## Phase 5: Apex Programming (Developer)

Create custom Apex Classes, Triggers, and Test Classes (with >75% coverage). Implement trigger handler frameworks for clean, scalable code. Use VS Code + Salesforce CLI for development.

## Phase 6: User Interface Development

Develop Lightning Web Components (LWCs) for custom UI experiences. Use SLDS for styling and expose components on Lightning App Builder pages.

## Phase 7: Integration & External Access

Integrate with external systems using REST/SOAP APIs. Use Named Credentials and Auth Providers for secure connections. Implement Platform Events for event-driven architecture.

## Phase 8: Data Management & Deployment

Use Data Loader for data migration (insert/update/export). Deploy metadata between sandboxes using Change Sets or Salesforce CLI (`sfdx force:source:deploy`).

## Phase 9: Reporting, Dashboards & Security Review

Build meaningful reports and dashboards for business insights. Conduct security reviews: field-level security, sharing rules, and CRUD/FLS checks in Apex.

## Phase 10: Final Presentation & Demo Day

Prepare a live demo for stakeholders. Showcase business problem, solution architecture, automation, code, integrations, and dashboards. Collect feedback.

By completing all phases, you will demonstrate a full-cycle Salesforce implementation project experience. This project showcases not only technical expertise but also real-world problem-solving, making it a strong portfolio addition.