

## Assignment no. ~~07~~.

Title:-

design and develop custom application  
(mini project) using salesforce cloud.

objectives:-

- 1) To learn salesforce cloud administration.
- 2) To install and configure the salesforce cloud administration features.

Software requirements:-

Ubuntu 18.04, PHP, MySQL.

Hardware requirements:-

Pentium IV system with latest configuration

Theory:-

Salesforce provide customer relationship management (CRM) to find the complete solution that include features rich solution for marketing sales, services partner management or any community management

- Salesforce grew into cloud software solutions and acquired several other companies for PaaS and SaaS.

- Salesforce is more popular in CRM system.

- It is invented in headquarters of sales force suitable in San Francisco in 1999.

## Important Terminology of Salesforce:

- i) opportunity:-  
potential sales deals that you want to track.
- ii) lead:-  
person who express interest is a prospect or prospect or potential opportunity.
- iii) Account:-  
Any company you want to manage including prospects.
- iv) contact:-  
person who work for account.
- v) Task and events:-  
Associate to opportunity contact or account
- vi) Reports:-  
Generate report based on real time summarization.

## Different sales of clouds in Salesforce:

- 1) sales cloud
- 2) service cloud
- 3) marketing cloud
- 4) community cloud
- 5) wave analytics
- 6) Apps and programs
- 7) IoT cloud.



## Sales cloud:-

Helps to sell products and services manage connection with customer and close more deals.

It includes chatter social contact marketing and leads data.com opportunity and quotes approval and work process files and libraries analytics and forecasting partner management App exchange. email and calendaring.

## Features:-

- 1> contact management
- 2> opportunity management
- 3> salesforce inbox
- 4> salesforce (R) Engage.
- 5> sales collaboration
- 6> lead management
- 7> marketing automation
- 8> sales data
- 9> partner management
- 10> lightning voice
- 11> mobile app.

## Benefits:

- 1> easily spot important fields on record.
- 2> see records and their related items as tabs on the screen.
- 3> manage leaving critical data behind.

### service cloud:

- 1> It increase the agent productivity.
- 2> Reduce service cost
- 3> Gain better visibility into service organisation.
- 4> It include customer portal, live agent, contact and entitlement

### Feature:-

- 1> lightning console
- 2> live agent
- 3> communities
- 4> knowledge
- 5> snap-ins
- 6> service wave analytics
- 7> Field service lightning
- 8> omni Routing
- 9> social customer service.

### community cloud:-

- Enterprise community platforms connection customers, partners & employees directly to the information apps and experts they need to take action.

### Features:-

- 1> Business Integration
- 2> personalization
- 3> customization and Branding
- 4> mobile
- 5> community Builder and template.
- 6> engagement
- 7> topics



### Unique Need of Salesforce cloud:-

- 1> sharing rules | org-wide default.
- 2> Approval processes.
- 3> Junction object.
- 4> masters-detail
- 5> Report
- 6> data loader.
- 7> Formula Fields
- 8> Analytical snapshot
- 9> workflows
- 10> encrypted fields
- 11> Governor limits.

### Steps for building a new cloud.

- 1> create application description
- 2> Add relationships.
- 3> use formulas and validation
- 4> Automating process using work flows.
- 5> creating approval process
- 6> creating reports and dashboard.
- 7> Adding programming logic to Apex.
- 8> Adding tests to your apps.
- 9> Building custom user interface using visual studio.
- 10> creating public web pages using sites.

### Conclusion:-

As a cloud services provider we are managing the user interfaces user accounts by using administrative features.