Aim: Creating a Warehouse application in SalesForce.com.

Theory:

**Points to be included:**1. What is a CRM application?

Customer relationship management (CRM) is **a technology for managing all your company's relationships and interactions with customers and potential customers**. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

2. Features of Salesforce.com.  
**Salesforce CRM Features and Benefits.**

**Account and Contact Management**

**The account and contact management feature of Salesforce provides the complete information of each customer. It includes the activity history of each customer, communications done with customers, Key contacts, etc. In simple words, it contains all the information related to customer communication.**

**2. Opportunity Management**

**It enables us to manage all the sales deals with the Salesforce and keep connected with the people and information required to complete every deal. It also includes the stage of every deal and what move should we need to take to win the specific deal.**

**3. Salesforce Engage**

**Salesforce engage feature allows us to share the marketing content with sales to enhance the company's selling power. It works like a bridge to fill the gap between sales and marketing. It gives real-time sales alerts as per the engagement with the customers.**

**4. Sales Collaboration**

**The sales collaboration feature allows the sales team to collaborate with powerful social tools in Salesforce. It also helps to find the experts for sales, share competitive data among the team, etc., to grow the business from anywhere. It allows the sales teams to work together on various sales opportunities and check progress from anywhere.**

**5. Sales Performance Management**

**Sales performance management is mostly categorized as compensation management, which varies due to different software tools. This improves the execution of the sales process day-by-day. It provides a metric-based goal setting for the teams and helps the sales team with continuous feedback and rewards.**

3. Relationships in salesforce.com

**Types of relationship in Salesforce**

**Master-detail relationship-**

1. When a master record gets deleted, its related child/detail record automatically gets deleted.
2. In a master-detail relationship both the objects are strongly coupled to each other.
3. Sharing and security settings of the detail records are inherited as per their master settings.
4. We can define this relationship in between custom objects and in between standard and custom objects. Note that, the standard object must be on the master side while creating relationships between standard and custom objects.
5. **Lookup relationship-** In this, objects are loosely coupled.
6. When a parent's record gets deleted, the child remains in existence.
7. We cannot create a roll-up summary field in a lookup relationship.
8. Parent and child records have their own sharing and security settings in look-up relationships.
9. The Look-Up relationship field is not mandatory by default but we can select a checkbox to make it mandatory in lightning.
10. We can have a maximum of 40 look-ups per object.

**Self-relationship-**

Self-relationship simply means creating a relationship with itself. In this, we can relate an object with itself by look-up. Example: Account object has a field called **Parent Account** which shows the self-relationship in Account.

4. Steps(screenshot) to create a warehouse application on salesforce platform (include  
screenshots)

**Conclusion-**