

**D. Y. PATIL COLLEGE OF ENGINEERING, AKURDI,
PUNE**

Affiliated to

SAVITRIBAI PHULE PUNE UNIVERSITY

Department of Information Technology

Mini Project

on

**Design and develop custom Application
using Salesforce Cloud.**

By

Name : Kalpesh Pawar

Roll No. : TEITB138

Seat No. : 190088501

Class-TE B

2022-2023

Contents

Sr. No	Chapter Name	Page No.
1	Introduction	6
2	Salesforce Cloud Platform	7
3	Salesforce Architecture	8
4	Salesforce App exchange	9
5	Methodology details	10
6	Salesforce Applications	11
7	Conclusion	13
8	References	22

Introduction

With the growing data generation, businesses are required to leverage a platform that helps them make use of their customer data well, and Salesforce is one such CRM platform. Salesforce is used by startups to Fortune 500 companies. In this Salesforce tutorial, you will walk through what is Salesforce and how beneficial it is. The Salesforce project is a strategic initiative aimed at implementing Salesforce, a leading customer relationship management (CRM) platform, within our organization. This project is designed to streamline our sales, marketing, and customer service processes, enhance data management, and improve overall customer engagement. By leveraging Salesforce's powerful features and capabilities, we aim to drive revenue growth, improve operational efficiency, and deliver exceptional customer experiences.

Why Use Salesforce?

Before moving to understand what is Salesforce, this tutorial will acquaint you with the term CRM. Back in time, employees managed manually data. They jotted down information and stored them in files. This way, they failed to make use of all the available data. Gradually, as years passed by with the advent of computers, companies made use of Excel sheets and documents for managing their data. However, this approach proved to be time-consuming and inefficient when handling large volumes of data. There was a requirement to effectively handle and analyze vast volumes of user data by every employee in the organization. By the term effective, it refers to methods that could be incorporated to improve customer satisfaction. This was when CRM, known as customer relationship management, was introduced, and it addressed the above issues. Initially, customer relationship management (CRM) solutions were hosted on a company's server. This became time-consuming and highly expensive. Such CRMs were also challenging to use. The solution was to build an affordable and cost-effective CRM software and provide it entirely online as a service. This was the core idea behind Salesforce.

Salesforce Cloud Platform

Salesforce is a cloud-based software company that provides businesses with tools that help them find more prospects, close more deals, and provide a higher level of service to their customers. Salesforce, Inc. is a famous American cloud-based software company that provides CRM services. Salesforce is a popular CRM tool for support, sales, and marketing teams worldwide. Salesforce services allow businesses to use cloud technology to better connect with partners, customers, and potential customers. Using the Salesforce CRM, companies can track customer activity, market to customers, and many more services. A CRM platform helps you go deeper with all your metrics and data; you could also set up a dashboard that showcases your data visually. In addition to this, you can also have personalized outreach with automation. Another significant benefit is that a CRM platform can also improve customer service's ability to help customers or a sales team's outreach efforts. Salesforce is a cloud-based Customer Relationship Management (CRM) platform that enables businesses to manage customer data, sales operations, and marketing campaigns. It provides various features, and tools businesses can use to improve customer relationships, including customer segmentation, customer data management, and customer support. Salesforce also offers a variety of integrations with third-party applications and services, making it a powerful and versatile CRM platform.

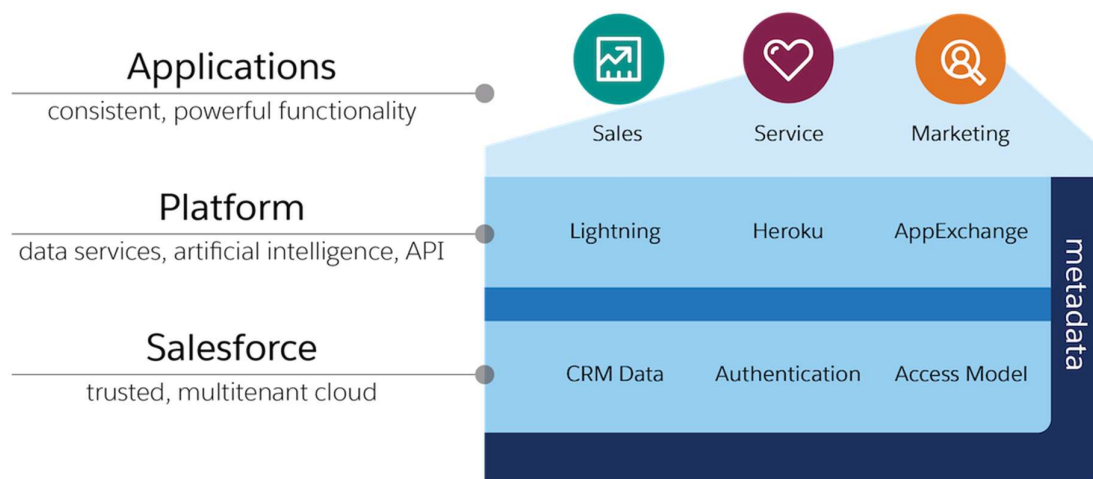
Salesforce and CRM Background

Salesforce helps businesses keep track of customer interactions and sales data. It can manage leads, contacts, opportunities, and cases. Salesforce also offers several features to help businesses automate their sales and marketing processes, such as email marketing, lead capture, and lead scoring. CRM systems like Salesforce can help businesses improve their customer service and sales operations.

Salesforce Architecture

This tutorial will now briefly walk you through the Salesforce architecture. Here, you will be acquainted with the different layers of the Salesforce architecture individually.

1. **Multi-tenant:** Salesforce stores data in a single database schema. There can be a single instance of a software server with multiple tenants. Speaking about a multi-tenant architecture, there is a single shared application service to several clients. This makes it cost-effective. On the contrary, in a single-tenant, the development and maintenance cost must be entirely owned by one client. Hence the multi-tenant architecture is a boon.
2. **Metadata:** Salesforce uses a metadata-driven development model. This allows developers to only focus on building the application. This metadata-driven platform makes customization and scaling up easy.
3. **API:** Salesforce provides a powerful source of APIs. This helps in developing and customizing the Salesforce1 Mobile App. Every feature of the Salesforce design has been planned and implemented precisely.



Salesforce Infrastructure :

Salesforce Infrastructure is the back-end system that powers Salesforce's cloud computing platform. It includes several components, such as the Salesforce application server, the database server, the application development environment, and the application integration platform. Salesforce Infrastructure is designed to be highly scalable and fault-tolerant, supporting the heavy demand placed on it by the Salesforce application. It is constantly being updated and improved by Salesforce's team of engineers to keep pace with the ever-changing needs of the Salesforce application.

Salesforce Services

Moving on, you will explore the Services offered by Salesforce:

- SAAS (Software As A Service): Here, you can directly obtain the built-in software and make use of it.
- PAAS (Platform As A Service): PAAS offers you the framework and platform to build your websites and apps.
- IAAS (Infrastructure As A Service): IAAS plays a vital role in Salesforce development, although not very widely used.

Salesforce Cloud Services

The next topic is Salesforce Cloud Services. Here's a list of the Salesforce cloud services that are going to be highlighted in this tutorial on what is Salesforce.

1. Sales Cloud: It is one of the most essential and popular products of Salesforce. It is a CRM platform that allows you to manage your company's sales, marketing, and customer support aspects. Sales Cloud gives you the status of the lead that will be helpful for sales executives.

2. Marketing Cloud: Marketing is crucial when it comes to running a business. Marketing cloud lets you run campaigns, manage emails, messages, social media, content management, data analytics, etc., with the help of a tracking system.
3. Analytics Cloud: This enables users to create a highly visually appealing dashboard of the available data. By doing so, you can get an in-depth understanding and analyze the trends, business, and more.
4. IoT Cloud: Salesforce IoT cloud is used when your company needs to handle the Internet of Things (IoT) data. This platform can take vast volumes of data generated by various IoT devices; following this, you get real-time responses.
5. Salesforce App Cloud: You can use this service to develop custom apps that will run on the Salesforce platform.
6. Salesforce Service Cloud: Salesforce also helps you serve your customers. This is a service platform for your organization's support team. It provides features like case tracking and social networking plug-in.

These were a few of the top cloud services offered by Salesforce. Due to its diverse options, companies use Salesforce to assist with sales, marketing, and analysis.

Salesforce App-Exchange

Salesforce App-Exchange is a marketplace that offers a wide variety of apps that can be used to extend the functionality of Salesforce. It was created for the Salesforce platform and provides customers with access to a wide range of applications that extend the capabilities of their Salesforce instances. Salesforce AppExchange is a marketplace that offers a wide range of third-party applications and solutions that can be integrated with the Salesforce platform. It provides users with access to a vast ecosystem of pre-built apps, components, and services that extend the functionality of Salesforce and address specific business needs. AppExchange offers apps for various industries and business functions, including sales, marketing, customer service, finance, and more. Users can browse and install apps directly into their Salesforce org, allowing them to customize and enhance their CRM experience. The AppExchange ecosystem enables organizations to leverage the power of Salesforce and tailor it to their unique requirements, ultimately driving productivity, efficiency, and innovation.

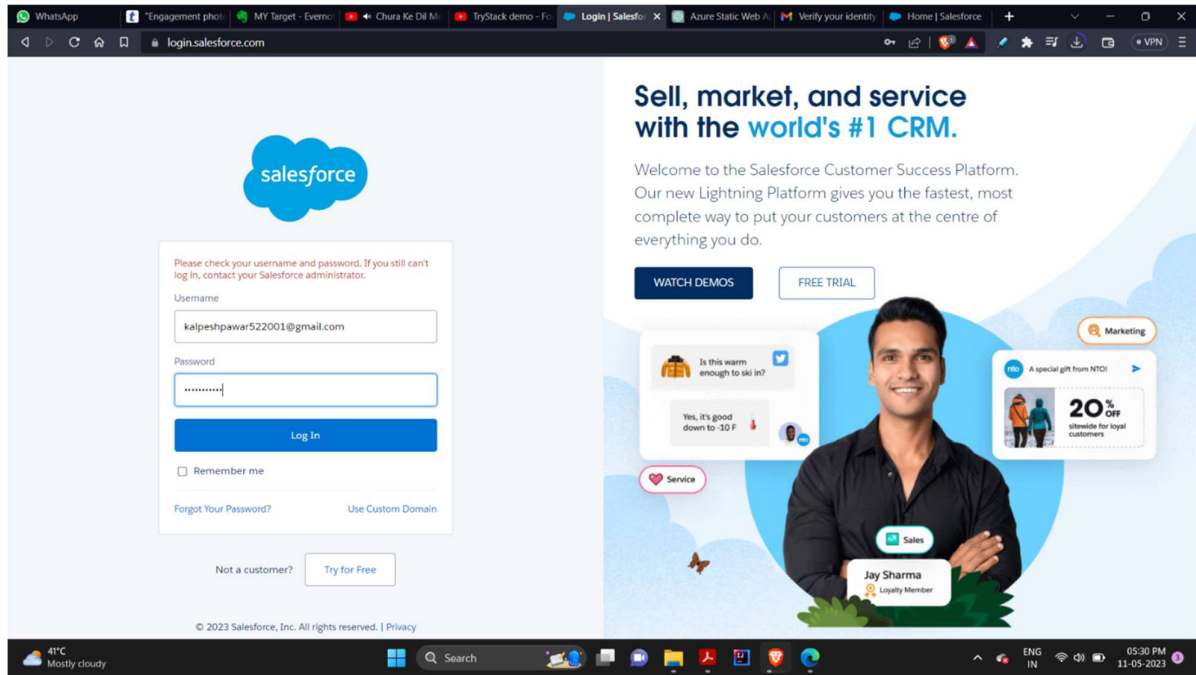
What Is the Salesforce App Exchange Program?

The Salesforce App Exchange program is a marketplace that allows customers to find, try, and buy trusted business applications that extend the power of the Salesforce Customer Success Platform. App exchange is the first and only business app store designed for the enterprise, and it's an online marketplace that lets you quickly and easily find, try, and buy apps that work with Salesforce.

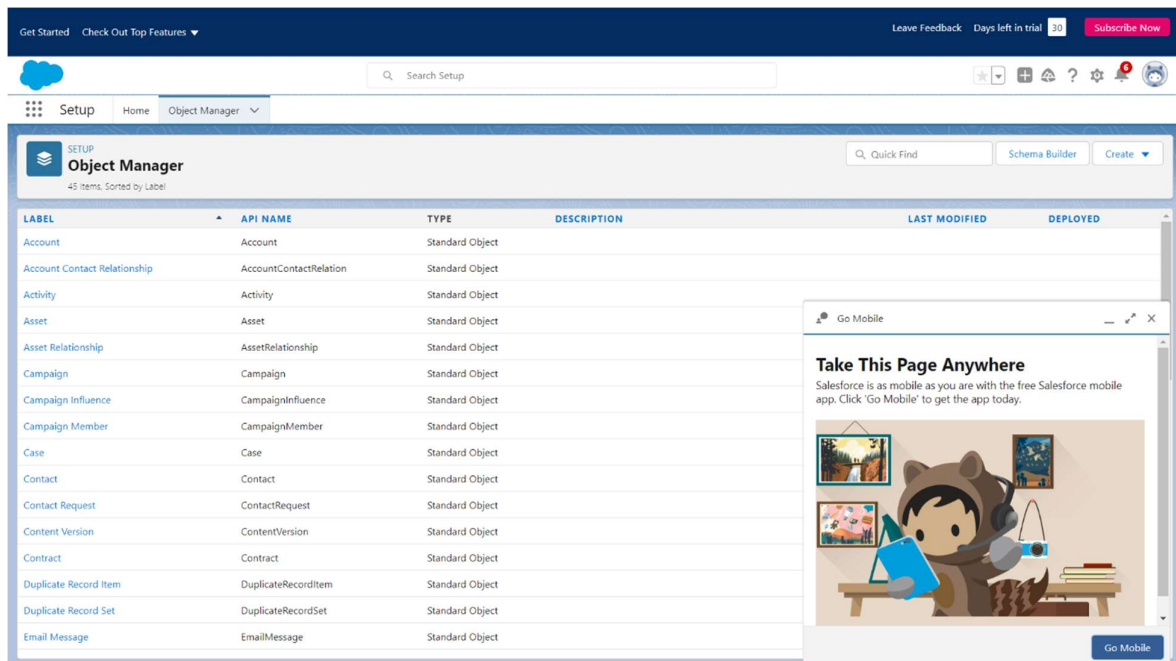
Salesforce App Exchange is the world's largest business app store. With over 4,000 apps, it's designed to help you find the right app for your business. Whether you're looking for an app to help you close more deals, manage your projects, or get more out of your CRM, App exchange has the solution for you.

Methodology

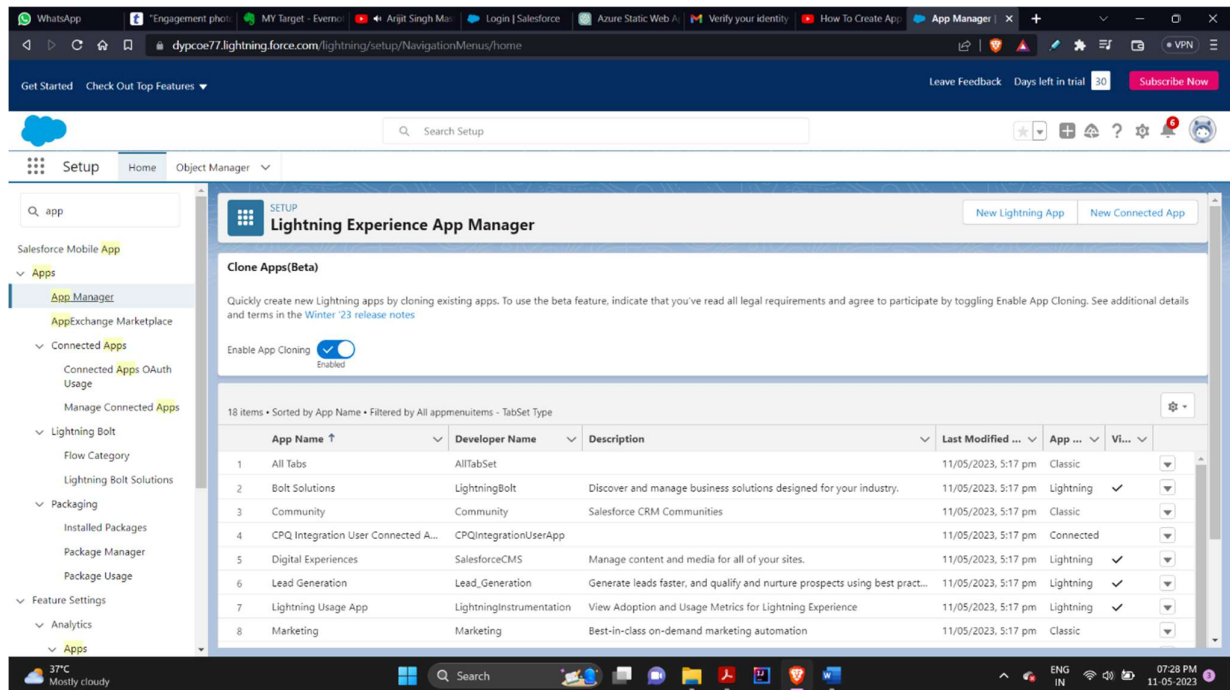
Login into your Developer Edition (Org.)



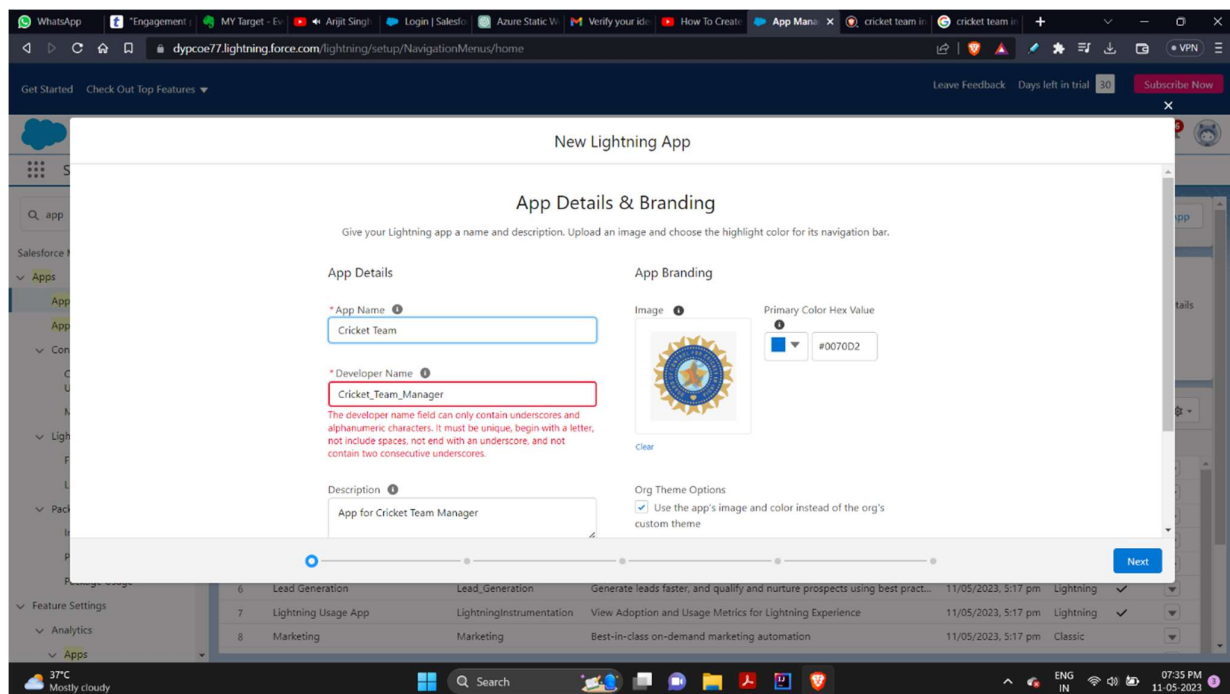
Open object manager .



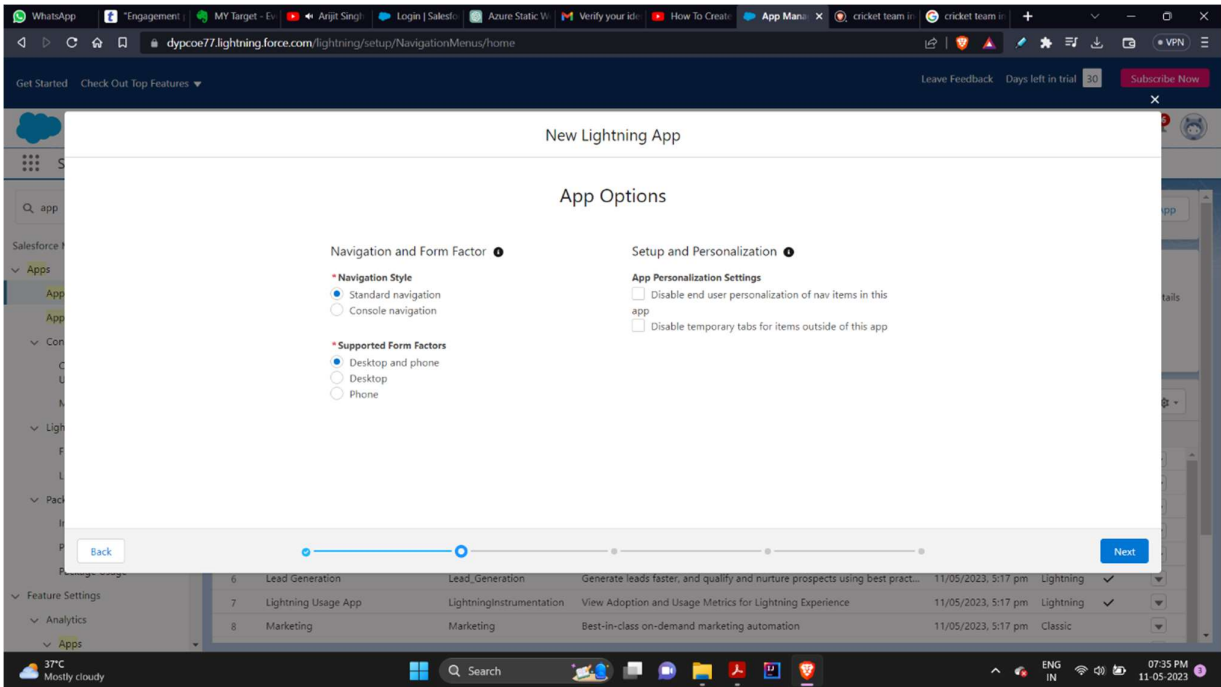
Search "App Manager" and click on it and you can see the button to create a new lightning App on the right side and create an app.



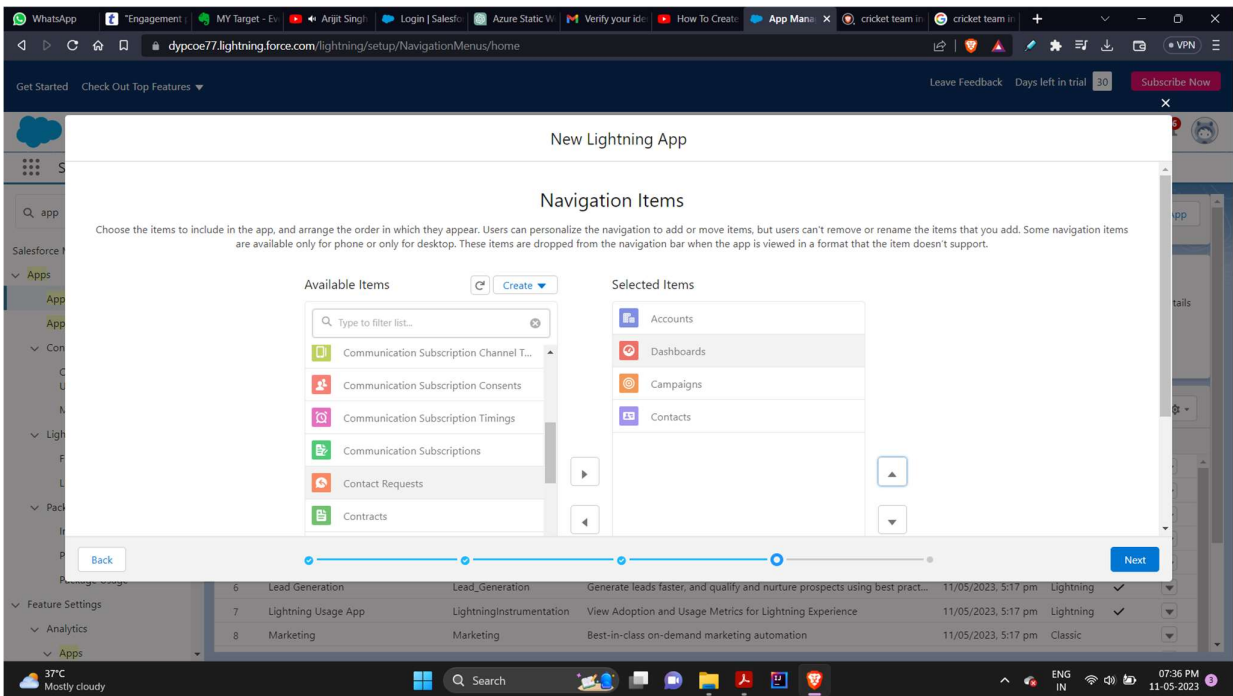
Provide a name to the app , description and upload Image



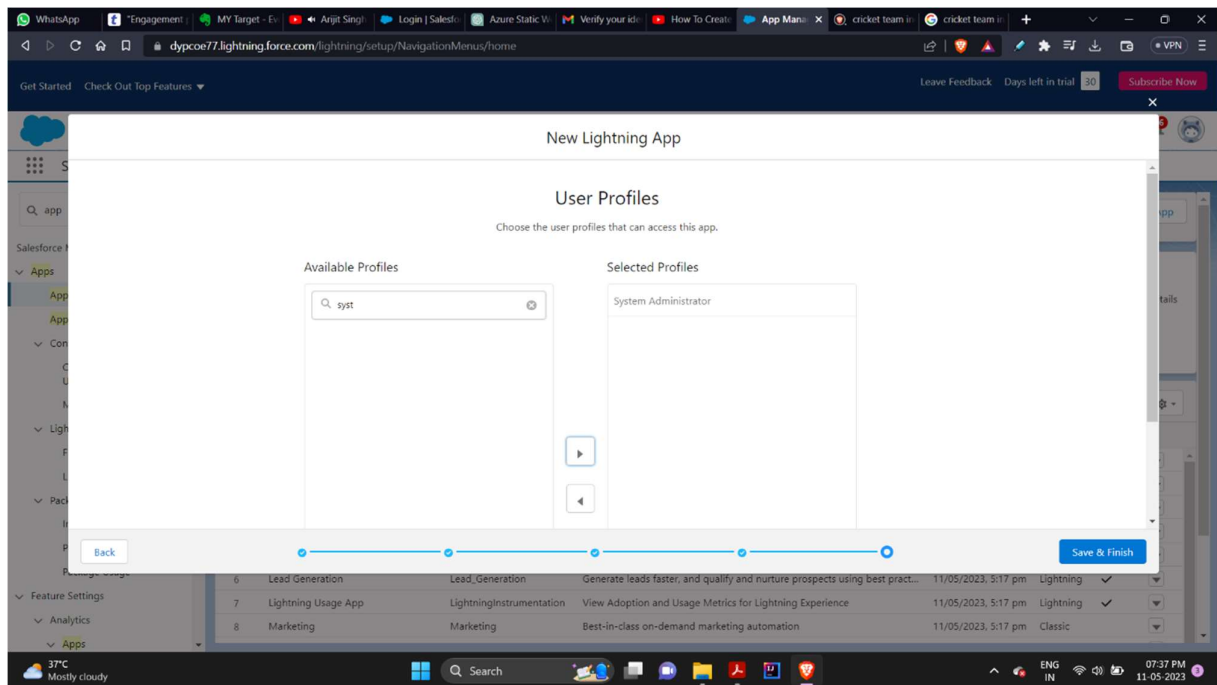
Giving a name to the app and set the Navigation, Setup & personalization and App Personalization Settings,



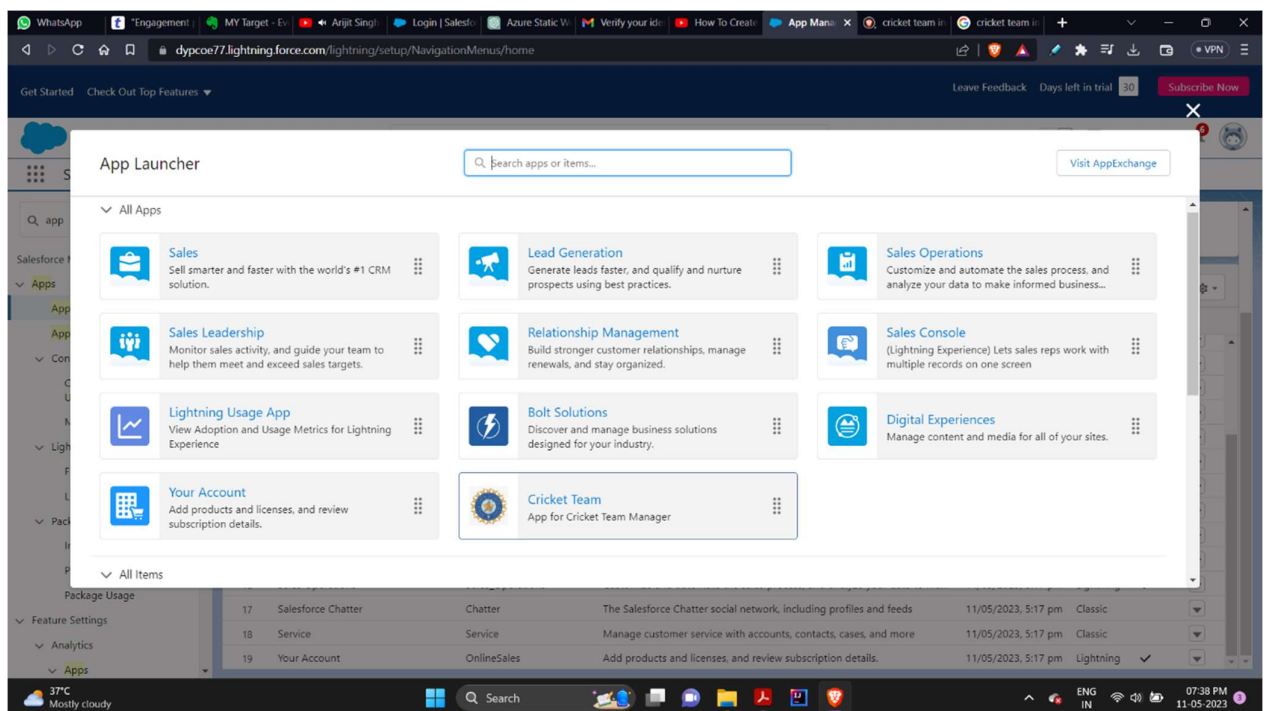
Adding navigation items .

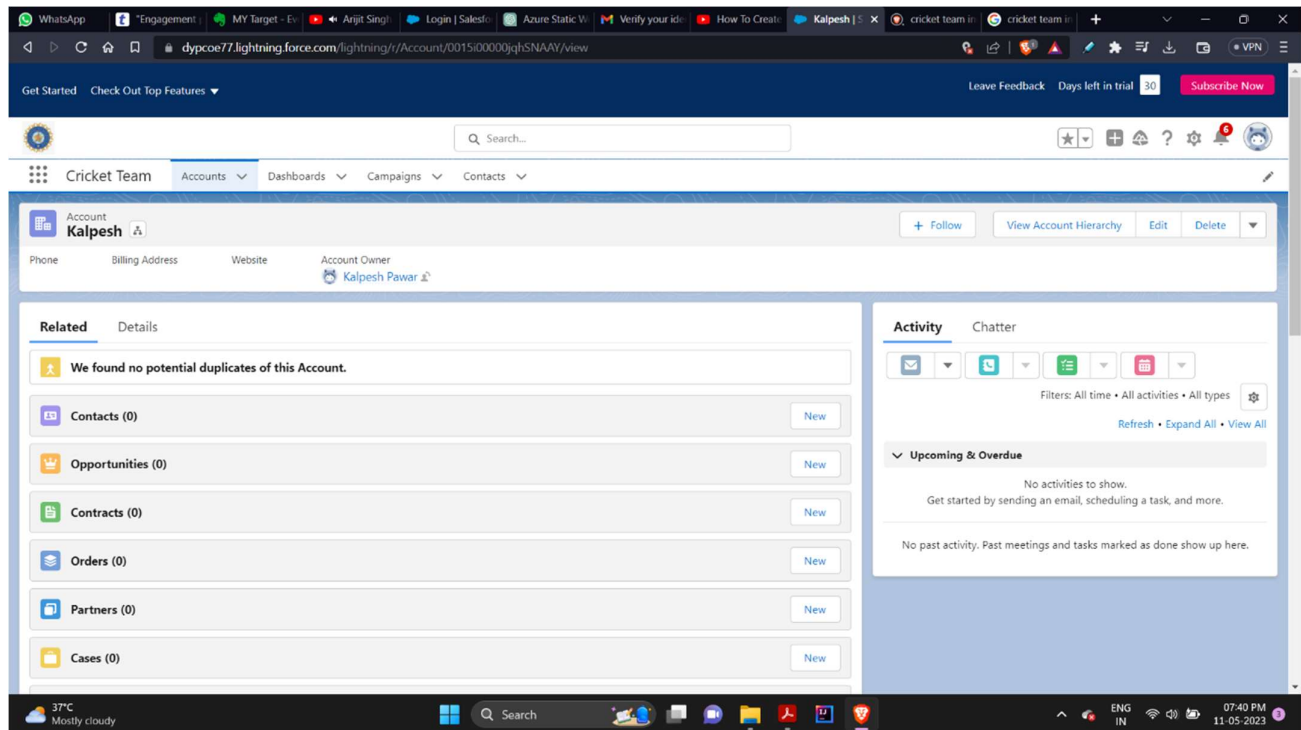


Assign this app to the particular user profile.

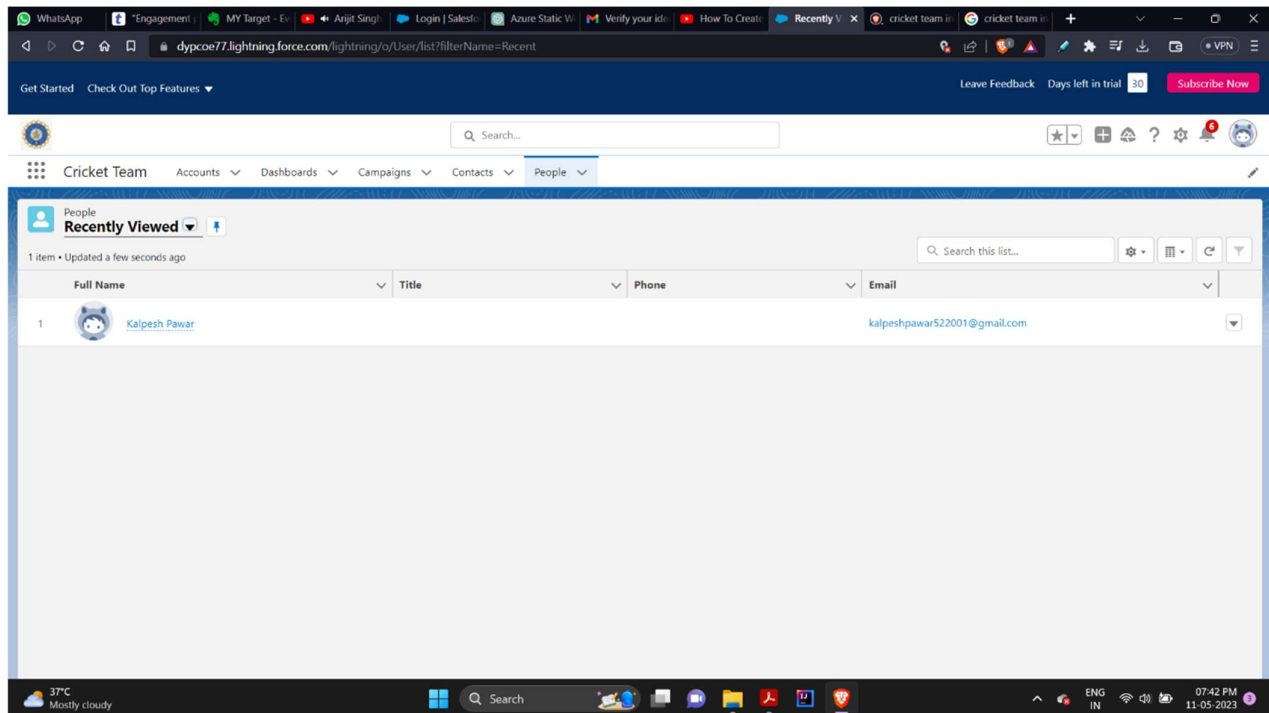


Our app is successfully created. Use the app launcher to load our created app,





Finally ,app has been created in Salesforce cloud environment.



Salesforce Applications

- **Customer Service:** Salesforce provides excellent customer service from anywhere in the world. It helps in resolving customer issues faster and improves support agent response time. Salesforce allows you to unify email, social, phone, and chat support and helps manage every channel from one view.
- **Customize Data:** Salesforce allows you to handle and customize different types of data. It helps you track real-time analytics and enhance the customer experience.
- **Flexible Data Reporting and Analysis:** Salesforce allows flexible data reporting and analysis. Here, sales representatives can create their reports to check the accounts they haven't worked on for a while.
- **Understand Customer Data:** The Salesforce tool makes you understand customer data, identify their interests and perception. You can locate and re-engage inactive customers and increase sales by tracking customer interaction.
- **Community Engagement:** Salesforce's Community Cloud enables organizations to create branded online communities for their customers, partners, and employees. It facilitates collaboration, knowledge sharing, support forums, and self-service options.
- **Analytics and Business Intelligence:** Salesforce's Einstein Analytics provides powerful analytics and data visualization capabilities. It enables businesses to gain insights from their data, create dashboards and reports, perform predictive analysis, and make data-driven decisions.
- **App Development:** Salesforce's App Cloud allows businesses to develop custom applications on the Salesforce platform. It provides tools and resources for building, deploying, and managing enterprise-grade apps tailored to specific business needs.

Conclusion

In conclusion, the Salesforce project has successfully transformed our organization's sales, marketing, and customer service operations. By implementing Salesforce, we have gained a centralized platform that has improved data management, streamlined processes, and enhanced customer engagement. The project has delivered tangible benefits, including increased sales revenue, improved customer satisfaction, and greater operational efficiency. Salesforce has been growing tremendously its employees, customers, offices throughout the world by providing innovative and best ideas/solutions to solve present generation business problems. Moving forward, we will continue to leverage the power of Salesforce to drive growth, optimize our workflows, and further enhance our customer experiences. The Salesforce project has laid a solid foundation for our future success in the ever-evolving digital landscape.

References

1. Salesforce official documentation
<https://developer.salesforce.com/docs>
2. Salesforce Trailhead
<https://trailhead.salesforce.com/>
3. Salesforce Industry report
<https://www.salesforce.com/company/recognition/analyst-reports/>