Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Phase 1: Problem Understanding & Industry Analysis

- Requirement Gathering
- Stakeholder Analysis
- Business Process Mapping
- Industry-specific Use Case Analysis
- AppExchange Exploration

Phase 2: Org Setup & Configuration

- Salesforce Editions
- Company Profile Setup
- Business Hours & Holidays
- Fiscal Year Settings
- User Setup & Licenses
- Profiles
- Roles
- Permission Sets
- OWD
- Sharing Rules
- Login Access Policies
- Dev Org Setup
- Sandbox Usage
- Deployment Basics

Phase 3: Data Modeling & Relationships

- Standard & Custom Objects
- Fields
- Record Types
- Page Layouts
- Compact Layouts

- Schema Builder

- Lookup vs Master-Detail vs Hierarchical Relationships

- Junction Objects

- External Objects

Phase 4: Process Automation (Admin)

- Validation Rules

- Workflow Rules

- Process Builder

- Approval Process

- Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)

- Email Alerts

- Field Updates

- Tasks

- Custom Notifications

Phase 5: Apex Programming (Developer)

- Classes & Objects

- Apex Triggers (before/after insert/update/delete)

- Trigger Design Pattern

- SOQL & SOSL

- Collections: List, Set, Map

- Control Statements

- Batch Apex

- Queueable Apex

- Scheduled Apex

- Future Methods

- Exception Handling

- Test Classes

- Asynchronous Processing

Phase 6: User Interface Development

- Lightning App Builder

- Record Pages

- Tabs

- Home Page Layouts

- Utility Bar

- LWC (Lightning Web Components)

- Apex with LWC

- Events in LWC

- Wire Adapters

- Imperative Apex Calls

- Navigation Service

Phase 7: Integration & External Access

- Named Credentials

- External Services

- Web Services (REST/SOAP)

- Callouts

- Platform Events

- Change Data Capture

- Salesforce Connect

- API Limits

- OAuth & Authentication

- Remote Site Settings

Phase 8: Data Management & Deployment

- Data Import Wizard

- Data Loader

- Duplicate Rules

- Data Export & Backup

- Change Sets

- Unmanaged vs Managed Packages

- ANT Migration Tool

- VS Code & SFDX

Phase 9: Reporting, Dashboards & Security Review

- Reports (Tabular, Summary, Matrix, Joined)

- Report Types

- Dashboards

- Dynamic Dashboards

- Sharing Settings

- Field Level Security

- Session Settings

- Login IP Ranges

- Audit Trail

Phase 10: Final Presentation & Demo Day

- Pitch Presentation

- Demo Walkthrough

- Feedback Collection

- Handoff Documentation

- LinkedIn/Portfolio Project Showcase

Project Title: Social Media Lead Capture & Tracking – Salesforce CRM for Marketing Campaigns

Industry: Digital Marketing / Social Media

Project Type: B2C Salesforce CRM implementation

Target Users: Marketing Teams, Sales Representatives, Campaign Managers

Problem Statement: A digital marketing agency runs multiple campaigns across Instagram, Facebook, and LinkedIn. While these campaigns generate thousands of leads, the agency faces issues in consolidating leads from different platforms, assigning leads to the right sales reps, tracking conversion rates, and measuring ROI. The company wants to implement Salesforce CRM to automate lead capture, assignment, and tracking while providing real-time dashboards of campaign performance.

Use Cases:

- Lead Management: Capture leads from campaigns, assign automatically, store source.

- Lead Qualification: Scoring rules, flag high-potential leads.

- Campaign Tracking: Create Campaigns, link leads, track ROI.

- Lead Conversion: Convert leads → Opportunities, update deal stages.

- Reporting & Dashboards: Leads by source, conversion funnel, campaign performance.