"Management App in Salesforce"

Project report submitted in partial fulfillment for the requirement for the degree of

Bachelor of Technology

in

Computer Science and Engineering

By

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To

Department of Computer Science & Engineering and Information

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Candidate's Declaration

I hereby declare that the work presented in this report entitled **"Management App in Salesforce"** in partial fulfillment of the requirements for the award of the degree of **Bachelor of Technology** in **Computer Science and Engineering/Information Technology** submitted in the department of Computer Science & Engineering and Information Technology, Jaypee University of Information Technology, Waknaghat is an authentic record of my own work carried out over a period from February 2020 to May 2020 under the supervision of **Sibhu Kalidhasan,** Practice Lead – Salesforce , Cognizant India

The matter embodied in the report has not been submitted for the award of any other degree or diploma.

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This is to certify that the above statement made by the candidate is true to the best of my knowledge.

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ACKNOWLEDGEMENT

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Abstract

Salesforce is a cloud-based customer relationship management (CRM) software that accelerates business relationships and can transform the working lives of the team. Marc Benioff developed it in the late 1990s and now it has been announced as the world's most innovative company for six consecutive years by Forbes Magazine . Unlike traditional CRM software, Salesforce is an internet service. It is available with just a sign-up and logs in through a browser, and it is immediately available. It is based on cloud computing, where the customers, without the need of installing any traditional software, can access the cloud, i.e., through the internet, for their business needs .

Inventory Management (IM) is the method of controlling and supervising the storage, utilization and ordering of components that an organization can track of their items it sells. It is the act of controlling and administering the quantities of products in the sale. For a business, an inventory is the main asset which represents an investment by the owner until the item is sold .

To demonstrate its functionalities of Salesforce, I created an application for inventory management. Here, In the inventory management, there are two parts: one is administration part, and another part is customer portal. The administrator manages the inventory and store operations, and the customer buys the products in the inventory through customer portal.

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CHAPTER-1 INTRODUCTION

1.1 Introduction

What is Cloud Computing ?

Distributed computing is typically characterized as putting away and dealing with the information over the cloud, as opposed to a neighborhood server. Distributed computing is straightforward. All applications are created and run in the internet browser. Utilizing the web association, clients and designers will approach entire applications in this way disposing of the unpredictability and overhead of the keep up condition.

Not in any manner like standard business applications which are tangled, exorbitant and need pros to present, run, update and secure, conveyed figuring can be gotten to wherever with an online affiliation. In standard structures, the entire establishment must coordinate. For such kind of predictable association, and for the smooth run of the structure, a consistent upkeep is continually required. With circulated registering, there is no compelling reason to place money in getting and supporting gear and programming system, as such lessening the potential cost for customers and designers.
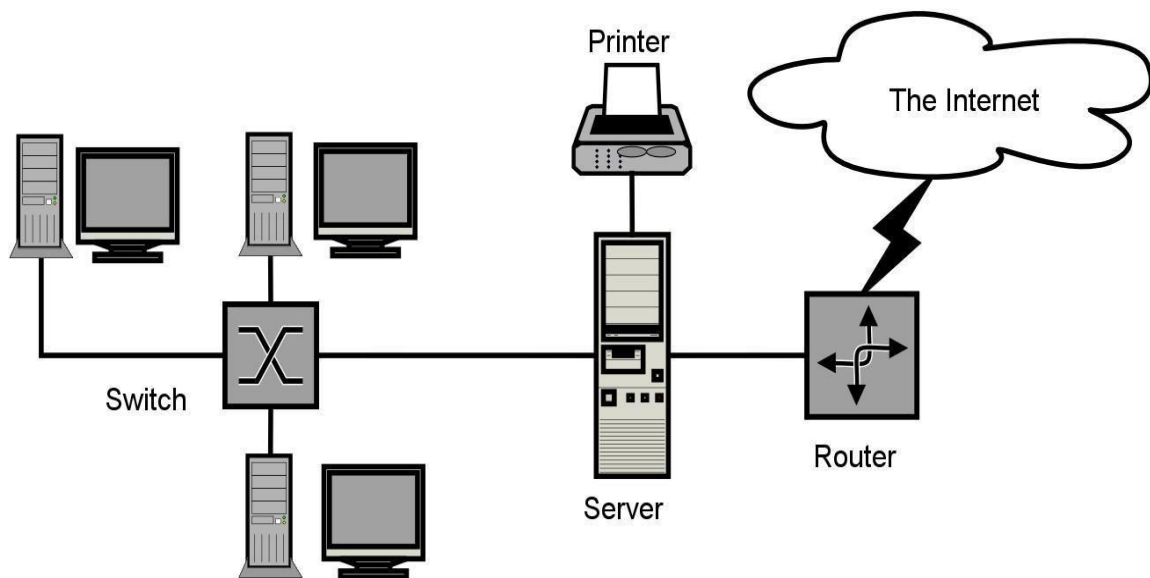

Figure 1: Cloud Computing

1.2 Service Models of Cloud Computing:

1.) Software As A Service (SAAS)

In SAAS the system is provided as a service over the cloud . The end customer can get to the application which is made by the provider on a cloud structure. The made applications are open from different customer devices through interfaces like a web program or a program interface. Cloud establishment, servers, frameworks, amassing and working structures can't be managed or compelled by the customers.

Cloud application administrations speak to the expanding cloud advertise. Programming as a help uses the web to send the applications regulated by the seller and whose interface will have the option to access on the client side. A considerable lot of the applications created utilizing SaaS will run in an internet browser by utilizing some modules. There won't be need of any download or foundations.

The significant applications which are created utilizing SaaS are human services related applications, customer relationship organizations, join email, and coordinated effort. A portion of the exorbitant endeavors which can't considered as programming sellers began utilizing SaaS to get the high ground and addition salary.

2.) Platform As A Service (PAAS)

The Client can send onto the cloud framework created by the clients with the assistance of libraries, instruments, administrations and the programming dialects which are upheld by the customer. The basic framework of cloud and capacity, servers, organize or working frameworks can't be overseen or constrained by the Customer.

Cloud stage administrations can be used for applications and their headways when cloud portions are given to programming. Designers can have the option to pick the structure utilizing PaaS where the applications can be extended to make or change. The testing and sending of uses become simple and quick if the PaaS is utilized .

Venture PaaS gives a self-administration entrance to programming engineers for managing processing framework from data innovation activities. Adaptability, Software as an assistance

enablement and multi-inhabitance can be procured by the applications utilizing PaaS. The coding crucial measure will be diminished for the undertakings utilizing PaaS and the application will be changed over to a half and half model .

3.) Infrastructure as a Service (IaaS)

The client can organize frameworks, stockpiling, handling and other basic processing assets in which the customer can run and send subjective programming like applications and working frameworks. The shrouded cloud foundation isn't controlled or supervised by the client but instead he can power over working frameworks, stockpiling, servers and system [14].
Cloud foundation administrations, alluded to as IaaS, are models valuable for managing and watching remote server farm structures, for example, arranging, handling, accumulating and organizing administrations. With the assistance of IaaS, customers will get utility charging and force benefits.
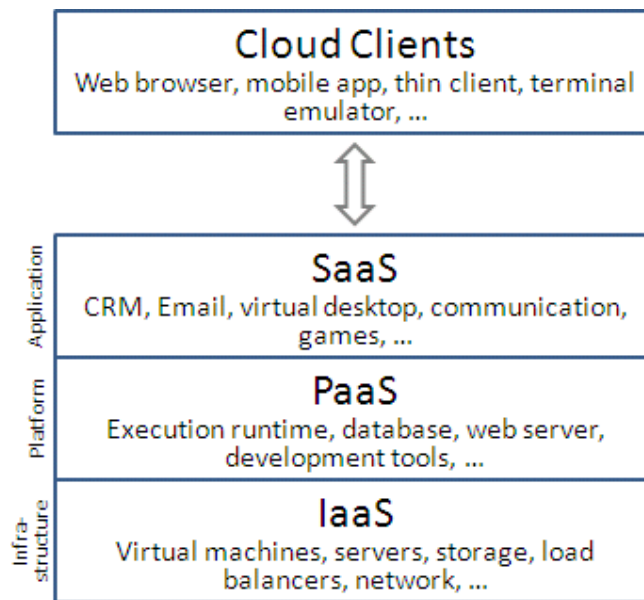
Figure 2: Service Models of Cloud Computing

1.3 CRM -Customer RelationShip Management

What is CRM ?

In this day and age everything is online from a pen to a plane.Every bussiness is doing their business on the web and even they are flourising yet not at an awesome rate and where they are slacking is client relationship as the entire information of these frameworks are disorderly they got crushed here, CRM is an innovation for dealing with all your organization's connections and cooperations with clients and potential clients. The objective is basic: Improve business connections. A CRM framework encourages organizations remain associated with clients, smooth out procedures, and improve productivity.

At the point when individuals talk about CRM, they are generally alluding to a CRM framework, an apparatus that assists with contact the board, deals the executives, efficiency, and the sky is the limit from there.

A CRM arrangement causes you center around your association's associations with distinct individuals — including clients, administration clients, partners, or providers — all through your lifecycle with them, including finding new clients, winning their business, and offering help and extra administrations all through the relationship .

Who is CRM for ?

A CRM structure gives everyone — from bargains, customer care, business headway, choosing, publicizing, or some other line of business — a better strategy than manage the outside associations and associations that drive accomplishment. A CRM instrument lets you store customer and prospect contact information, recognize bargains openings, record organization issues, and direct promoting endeavors, in all cases central zone — and make information about every customer participation available to anyone at your association who may require it.

With detectable quality and basic access to data, it's less complex to cooperate and augment productivity. Everyone in your association can see how customers have been spoken with, what they've bought, when they last purchased, what they paid, in this way generously more. CRM can help associations of all sizes drive business advancement, and it will in general be especially valuable to an autonomous endeavor, where bunches normally need to find ways to deal .

1.4 Problem Statement

Earlier, when the internet didn't boomed out in the 19the century, everyone whenever they need anything they went for shopping by their own and buy the product.But later internet boomed out in America and different different sites started to came up. It is human tendency to make things which are going to reduce the human effort. With the raise in the population from mere thousands to billions we as a human started to succecd in the trend of making our life more relaxed,and one of such invention is internet.

The place where they lags is customer relationship and to do so many CRM's are introduced and Salesforce is one of those. We are going to use salesforce to the manage the customers relation with the businesses and not only the existing customers but also the potential buyers.

And our project is based on the lightning experience of Salesforce platform . It is a user case problem where you are appointed as the the new manager of the company "Relaxation Gauntlet".

And now you need to customize the salesforce platform as per the company's requirement.

1.5 Objectives

To design and customize the online salesforce platform. To achieve this, we will have to achieve the following specific objectives:

1. Customize the standard objects and create new one:

- **Opportunity**—Potential sale of an adventure package to individual customers
- **Adventure Package (Opportunity Product object renamed)**—vacation, adventure, or excursion associated with a sales opportunity, including the explorer who is taking the adventure and the date of the adventure (use ServiceDate field).
- **Adventure (Product object renamed)**—Different vacation, adventure, or excursions products sold by Relaxation Gauntlet
- **Explorer (Contact object renamed)**—Prospective or existing customer
- **Case** – One of two record type
    Issues **reported by a customer**
    Issues **reported by the expedition leader**

2. Flexibility of Creating Customized Pages:

The very substance of being a compelling and easy to understand gateway originates from the way that the admin can customize a page based on his/her own free will. The admin should be free and have all the necessary privelages to customize the organization to the utmost perfection.

3. Simplistic UI:

The userinterface of the platform ought to be anything but difficult to learn and ought not be of problems .The principle explanation for this is, many users will be even from the illetrate foundation in this way, it must be neighborly for them also.The UI must be basic and agreeable yet in addition with the most extreme capacity to play out the errand

and legitimize the sole reason for the company , convenient yet highly customizable with all the tools and functions. It should be easy to learn even for an inexperienced user.

4. Support and Contact Information:

The web portal should provide full support for the section of the vendors of the community who are not well educated . The sales,services and the marketing department should be interlocked together where they can co-operate with each other.

5. Others:

Some other goals that should be achieved through the project are:
- Reduced hectic task of user
- Time saving
- Customized planning
- User friendly

1.6 Methodology

Since this project has to be agile as we may have to add other functionalities after some time and when we does that we must be that much flexible to do so .

Agile Methodology

In Agile method modules are developed independently and the modules have functionalities which are independent of other modules other are compared to creating consistent deliverables through each stage, as feedback from each product developed module and By obtaining advance. This is a non-stop training of modules by analyzing their response and new modules are released by adding small changes in functionality.

In all stages of the software development system both improvement and testing run concurrently and if the life cycle is improved, any improvement is to be made from it. This approach is built iteratively and improves itself with each iteration product that is generated within the software build time.

If the customer needs to improve the product, they want to make it from the product that can be done. This is an advantage over other models such as the Waterfall model..etc.

The waterfall model is not agile as in the waterfall method, the entire srs description is pre-requisite and if the software is intended to change over time then it cannot be done in this method and it is a truncation of this method and to remove this We use the agile method. The customer are given more freedom in this method and to make the product more productive we always relly more on the customers feedback and that thing is placed with the utmost importance.
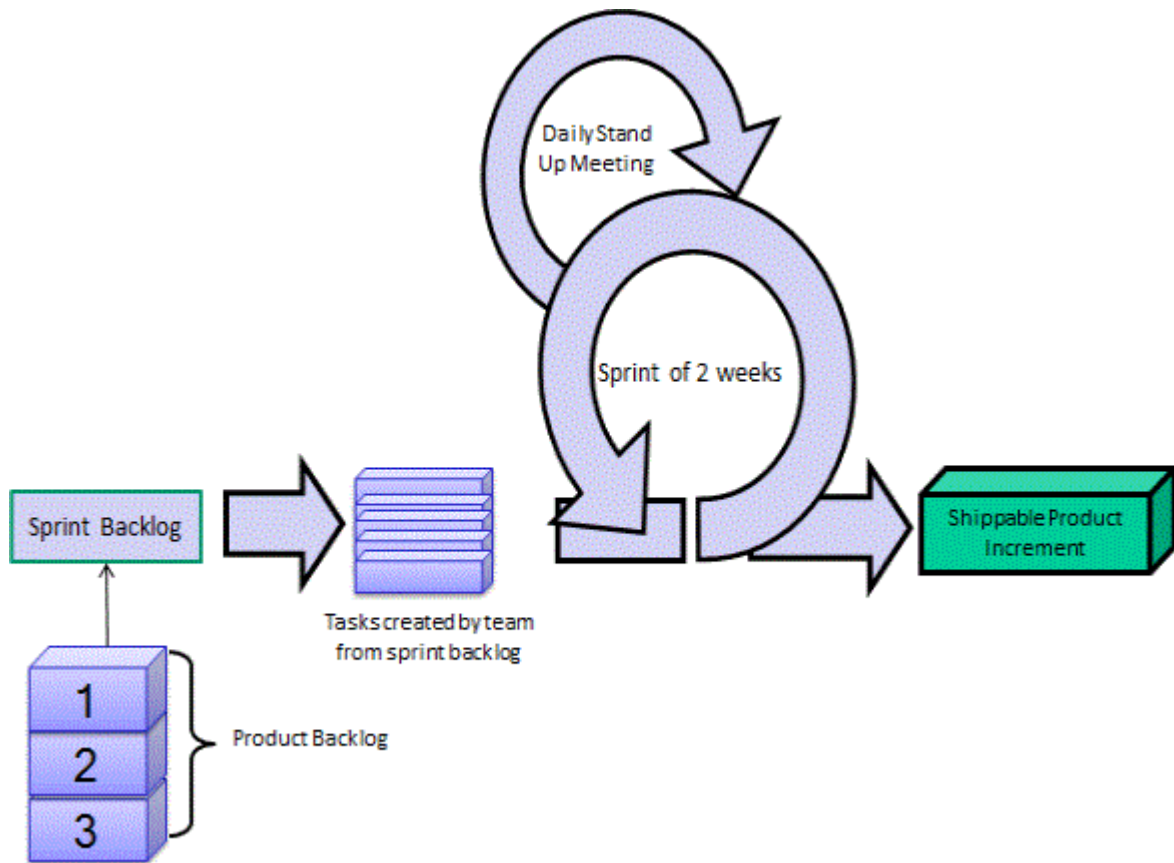
Scrum

Scrum is one of the most famous method of agile methodology and why ? because the number of products produced are more than and products are produced after each iteration.

Whole team is fully involved in the project and they all are committed to produce the product by the end of the each iteration. This not only benefit the developers but also the client because as the process passes on the client gets more clarity of the product and what they want. Scrum

works in iterative way and at the starting of each sprint a meeting of whole take place and the whole objective of the team is divided and at the end of each sprint and product produced is evaluated.

The below figure explains the scrum methodology :

Fig.3 Scrum Methodology

1.7 Organization

- Chapter 1 is the entry point of the project and it explains the main objective of the project which is about CRM and saleforce platform and why we need tomake it a important part of our life. It includes the basics of cloud computing . CRM its benefits for the daily lives of the different teams of the organization i.e sales,services. The problem statement defines the main purpose of our project which helps the admin to customize the salesforce platform as per the requirements of the organization.Finally, it explains the methodology that we are going to use in this project i.e. Agile Method.

- Chapter 2 covers all the we searched over the internet and as other useful information before beginning the project . This Chapter has all the summaries, reviews, and all other useful things which were going to make the project even more efficient. It assisted us in not gaining the knowledge for only this project but also for future work.

- Chapter 3 includes the development phase of the project in this chapter all the functional requirements are defined and how we can achieve these functionalities with the help of the features provided by the salesforce. We used various features like community support, user creation, flow builders, app managers and other more features and also SSQL which is the query language of salesforce.

- Chapter 4 Includes the testing of the project whether the functionalities which were added are working as per the terms in which they are defined and configured or not. All the functionalities are tested alone and if the result came out to be successful than these are tested as a set and the results are

written out there in the chapter 4. All features of this are mainly for the administrator and to him they are to how he/she can make the organization settings as per the requirements defined in chapter 3.

- Chapter 5 concludes the whole project starting from the definition to the end development of the project it also evaluates whether we are able to achieve the main objective as defined earlier in the project. It also includes the scope of future development in the project and sees's whether the scope can also be fulfilled in later stages. Apart from this it also has some further refrences.

CHAPTER – 2 LITERATURE SURVEY

1.) A research paper on HTML5 and its new added features

Introduction

HTML5 is the advanced version to support the additional features of today's need - to support many functionalities of today's world HTML5 has also introduced many other functionalites to support modern features like graphics and videos and even to work with the API's.

The new HTML5 elements

- \<canvas\>
- \<audio\>
- \<video\>
- \<source\>
- \<track\>
- \<embed\>

For different fields in HTML it takes lots of validation to be done before submitting the form, and the hard part is that all of the code is to be written by the developer to validate the data correctly.

On the other hand, there are specific rules in HTML5 for input validation which does the overhead of writing code for each field for the developer. This comes very handy with HTML5.

HTML5 provides the features which helps to make the skelton of the pages which different functionalities and features of the version 5 .

may be applications which are domestic in nature. The potential of HTML5 will the break the walls that are between web apps and mobile applications. The only problem HTML5 will have to face is that an opportunity will be available for the malware writes which is the common reason for today's hacks.

Summary

We learnt about the features and advantages of HTML5 which made the web a more interactive and cross platform, it provided various features to embed various audio and video formats on the webpage which on previous version of HTML required extra extensions. It also provided various validation for field elements which previously required to code specific restrictive code.

2.Salesforce

Salesforce is a customer relation platform where we integrate all sale,service,marketing all together to make a success story for the organization.Salesforce is for whosoever is billing to take his business to the new heights.

Architecture of Salesforce:

Salesforce is a Multi-Tenant platform i.e the resources are shared and it is more cost effiecient method than the single tenant. In single tenant customized resources are provided to the users where sometime it is a waste of time as the resources sometimes are not fully utilized while in the multi tenant the resources are shared to the fullest to reduce the cost and it is the most efficient method of cloud computing.
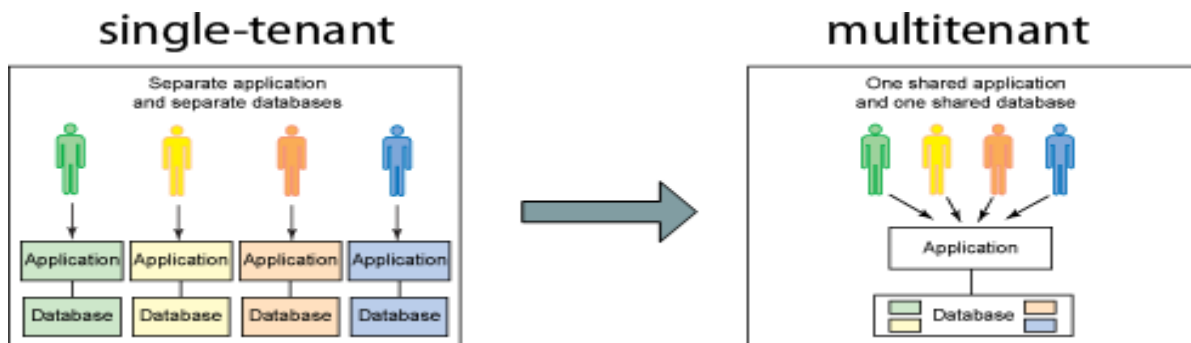
Figure 4: Tenancy

Organization of Salesforce:

Record – The record is same as a row in spreadsheet or in a table it is similar to the details of the particular instance of the object . The number of records are combined to form a table and in salesforce a object.

Field – This is the smallest part of the object this is used to hold a particular information . They sums up to form a record.

Object – It is similar to a table in the database.This defines the overall structure of an (as name suggests) object.

Org – This is the short form of the organization . It is a place where all the details of our organization is present.

App – The UI interface we make for its easy usage by the users.

Standard Objects of Salesforce :

Account : Accounts are objects which store the informations of the companies you are doing business with.This can be individual or as well as a whole organization.

Contact : These are the first wall of contact to the company .These are the people who work for the company and are contacted to make deals.

Leads : These are the potential buyers which further are converted to opportunities.

Opportunity : These are the qualified leads which are converted to the opportunites.
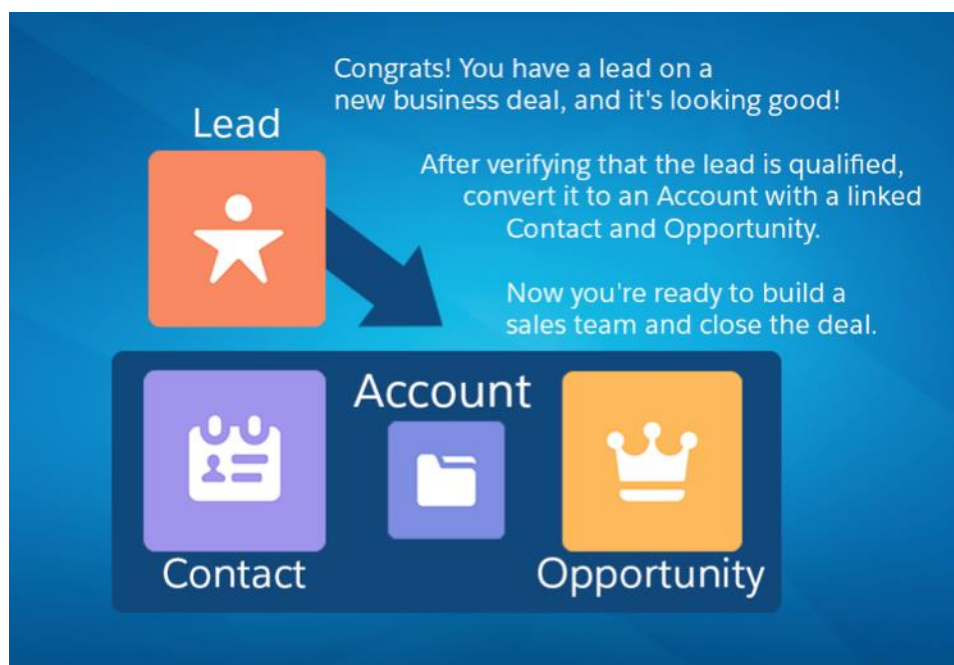
Figure 5: Relation between Lead ,Contact ,Account & Opportunity

Editions of Salesforce

Salesforce have 4 editions with different functionalities to support the CRM.

1)Professional Edition: All the functionalities provided by the salesforce platform.

2)Enterprise Edition: This edition is used by enterprises where the functionalities are similar to the professional one but the number of users are more.

3.)Unlimited Edition : Same functionalities as of Enterprise edition with some extra features like community support and force.one .

.4)Developer Edition: In this edition we have 2 licenses where we can add 2 users and we can avail all the other services of the enterprise edition but only during development time.

Figure 6: Different Versions of Salesforce

System Overview

The salesforce is not only available on browser but also on the mobile platform. The whole chrome app can be excessed on the mobile platform like the dashboard to view the daily reports and other day to day targets. It is made very friendly so as if a non tech person is there using this platform than he/she can do so as it offers click system where you do not need to hard code anything into the system as it can be done by simply dragging and dropping them. You can access the whole salesforce platform on the mobile as same as it is on the browser.
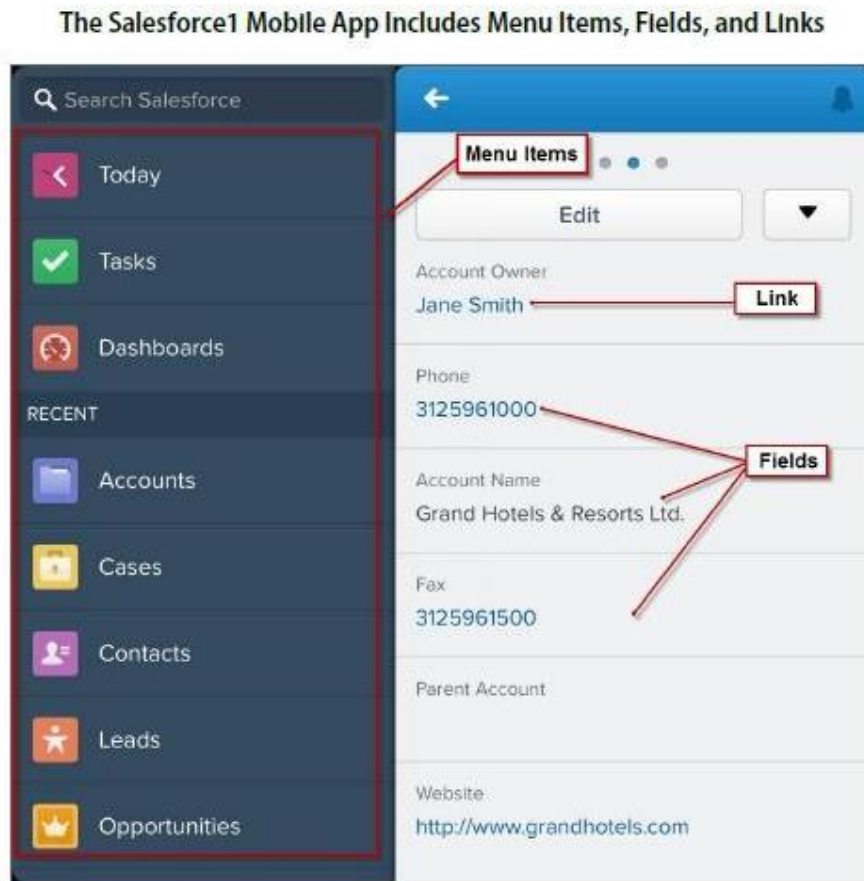
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Figure 7: Mobile App

Technologies of Salesforce :

Apex :

The person who has an idea of how to use the react app can easily grasp this technology.This is the coding language of the salesforce and only used on this platform and not on Other platforms.This language is specially designed to work with the objects and to provide a semingless experience with the salesforce.

A coding person can easily transit to this platform.It is a case sensitive language with the object orientied approach and have syntax similar to java language.

Visualforce:

Visualforce(VF) is a markup language used to make interactions between the database and the front end as it is drag and drop platform and also click and customize platform so the process which is behind the front end is made with the help of visualforce.

Lightning :

Lightning is the updated version of salesforce classic where we have 2 versions compact and comfy. This update is made in the salesforce classic to add further functionalities to the platform. Now the platform not only support the processes provided in the classic but in addition to that it also support builder process and some app creation for mobile platform also.

Usefulness of Salesforce's Enterprise Edition:

1.) More money for investing in innovation rather than infrastructure

As the business grows at a greate pace the business start to the need to add more infrastructure And the cost it is going to take from the cmpany's liquidity funds is much much more so, and as in the starting phase the company need to survive and utilize its money the best . So the salesforce does this to us makes the platform beneficial to us.

2.) Customize Salesforce as per your needs

You can customize saleforce as per your needs. It's a multi tenant i.e it uses same resources and further more if a need arises to make a custom object than salesforce provides this flexibility to us.

3.) Security

Figure 8: Salesforce Security Features

4.) App Exchange

With the prebuilt library if we ever need a application that is already present on app exchange we can do that.It happens many times that the application we are making is already present over the internt and rather than making the application from the scratch we can use that thing .

5.) Work from anywhere

With the presence of API's we can use this over many platforms like mobile,laptop and from anywhere from the world.
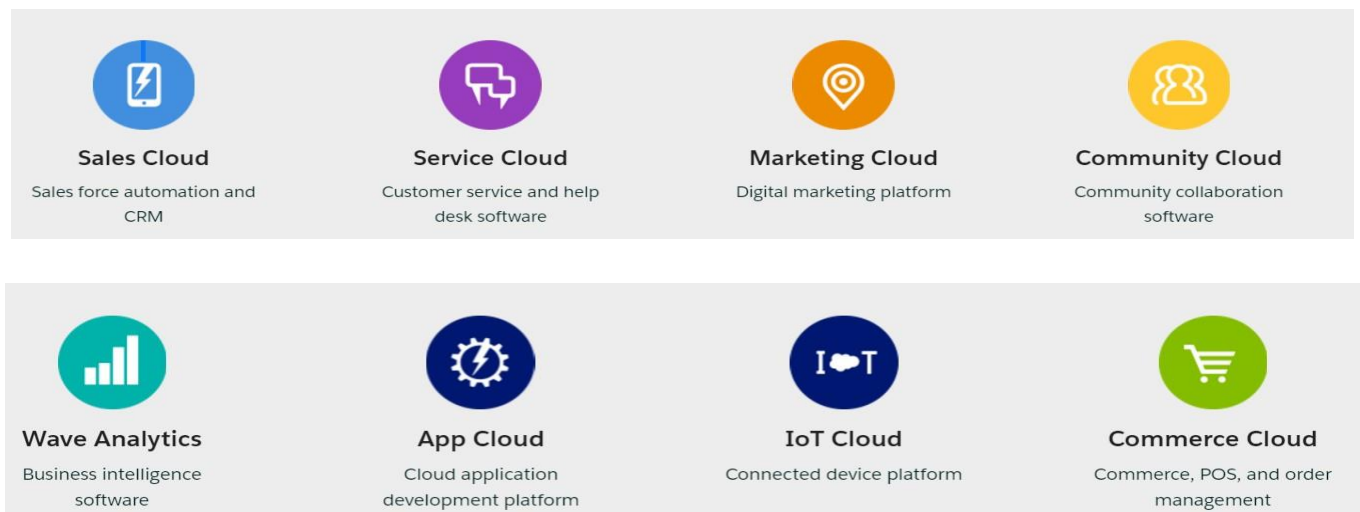
6.) Other benefits

Figure 9: Benefits of Salesforce

Chapter 3. The Management System of Relaxation Gauntlet
(Inventory Management)

You're the new Salesforce admin for Relaxation Gauntlet, the leading provider of epic vacation packages. The company specializes in outdoor adventures—trekking, rock climbing, scuba diving, snowboarding, and more. Relaxation Gauntlet offers an adrenaline rush for everyone.

Your goal is to redesign the UI and optimize the org so that it's as sleek and efficient as a zipliner in flight. Relaxation Gauntlet is rightly proud of its reputation for amazing customer service and transparent services and contracts. Your work tuning the org will not only help the company automate, but also help reps maintain their high quality of service.

The inventory system allow to maintain a seemingless experience between the the customer and the suppliers and also with the distributors. This application gives an overview idea of how salesforce entact the whole system into 1 without making any loss to the opportunities and other things.

Figure 10: Inventory Management System

Development Area

As salesforce is a online platform we only require the internet connection and login id and password . After logining to salesforce you reach the home page and than you can customize the pages as per your needs.

Steps:

- **Open browser and go to www.login.salesforce.com**
- **Enter your login credentials**

After entering the required details the app takes you to the page same as given below.
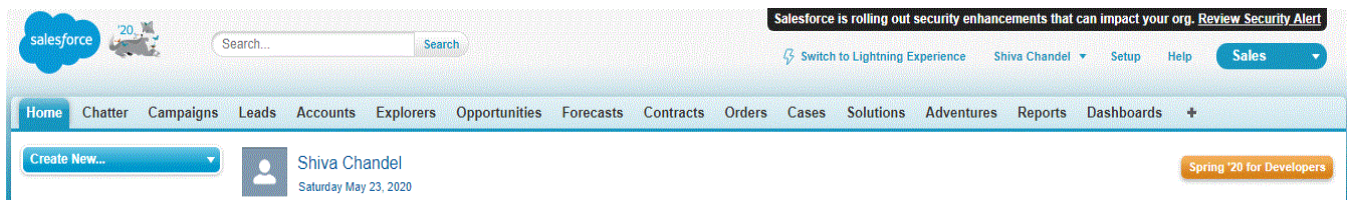

Figure 11: Salesforce Home Page

Create Custom Object Fulfillment

Bought experience bundle. This item contains the planning data, structures like waivers or protection, and all subtleties explicit to the journey booked. This item isolates the business records from the experience review records.
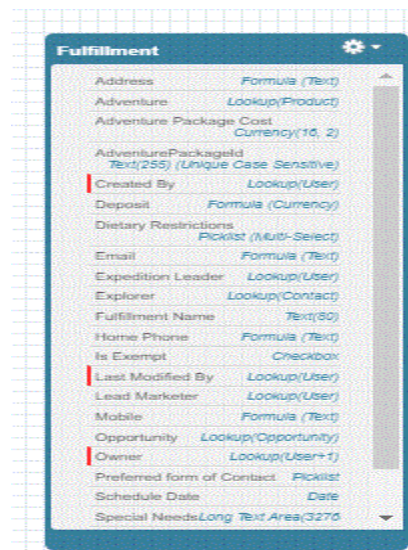
Setup->objects->new object

Figure 12: Fulfillment Custom Object
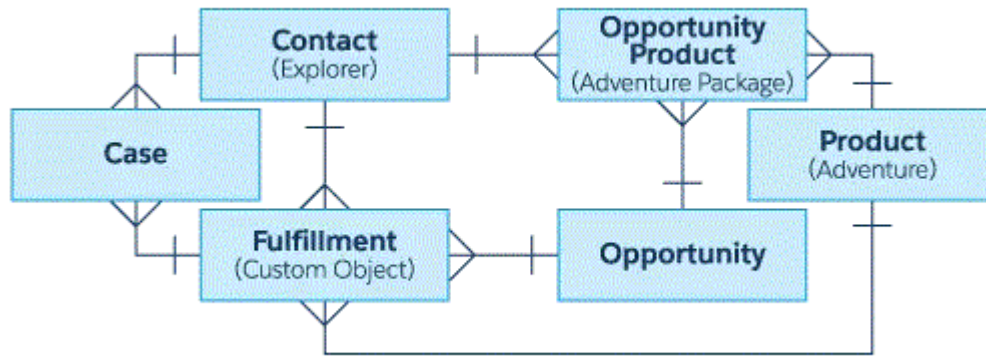
27

Entity Diagram

Figure 13: Entity Diagram

Rename the Opportunity To (Adventure Package)

Setup->object->Opportunity->rename

Simillarly rename the Product Object to Adventure Object

Setup->object->Product->rename

RelationShip Among Objects

The objects are related to each other in 2 ways. Lookup and Master Detail relationship.

LookUp Relation : In Lookup relation the objects are loosly coupled and the existence of 1 doesn't define the existence of the other one i.e if 1 of the object is removed than the other can exist .This kind of relation is useful whenever we need to fill a field from the parent object but not always.

Master Detail RelationShip : In Master Detail RelationShip the objects are tightly coupled i.e their existence is interdependent. It is kind of parent child relationship and the strongest among all.

In this project every object has lookup relation i.e they are loosely coupled but the account has a master detail relationship with itself . We have created a custom object fulfilment which have a lookup relation with opportunity , product ,case and account.
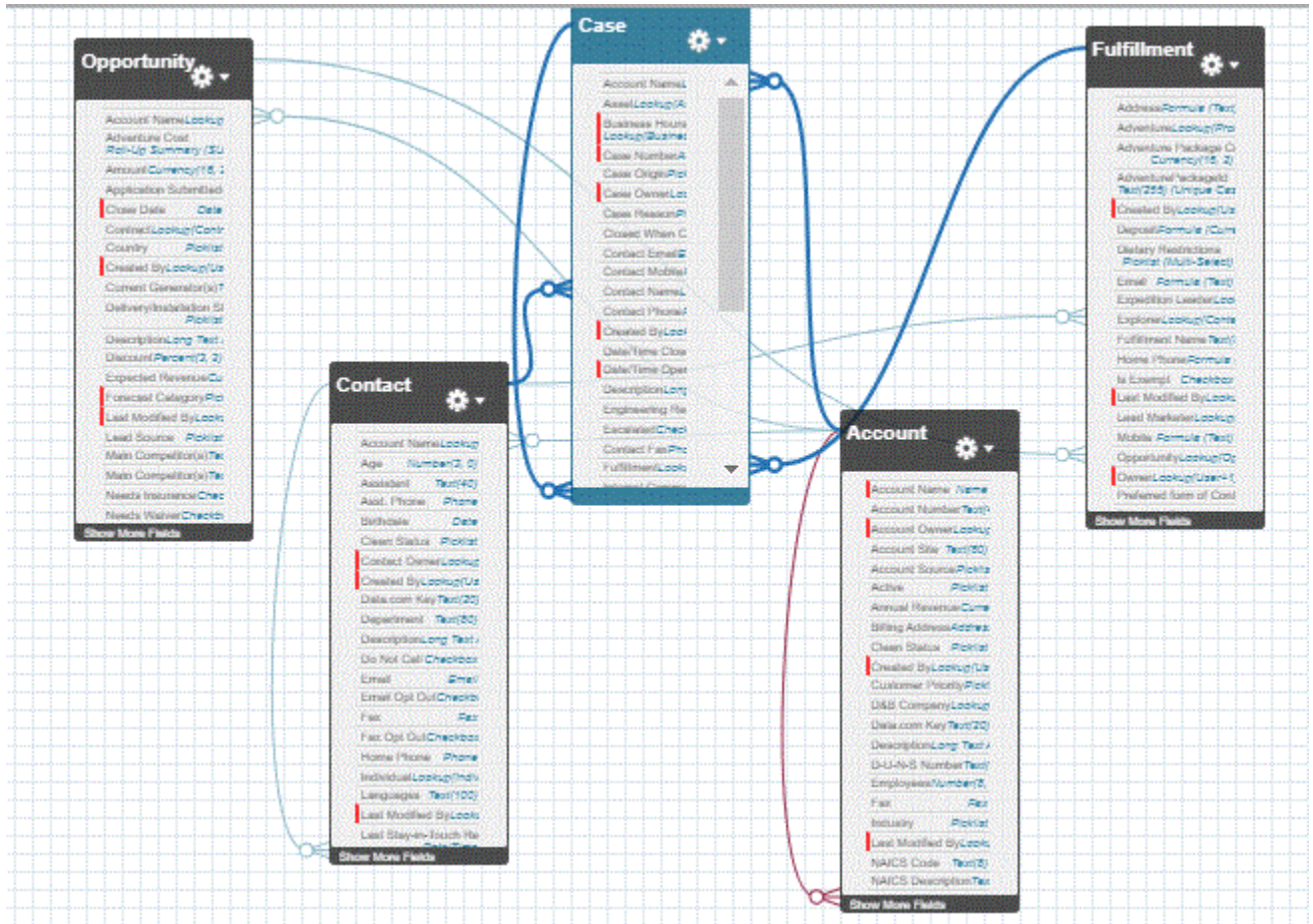
Figure 14: Object Relationship

Sales Process Automation

As a global company, Relaxation Gauntlet wants to make sure that its entire sales organization is aligned with how to sell adventure packages.

Update the existing Opportunity Stages to only these values (with their probability): New (10%), Needs Information (20%), Negotiation (40%), Negotiation Rejected (40%), Awaiting Approval (60%), Deposit Made (70%), Scheduled (80%), Completed (100%), Cancelled (0%). The sales process named **Individual Opportunity** includes all stages.

In each stage of each pipeline, highlight key fields to monitor (see below) and include appropriate guidance for success to help sales reps make the sale. Name it **Opportunity Path**. Note that Completed takes the place of Closed Won in the standard CRM stages, and Cancelled takes the place of Closed Lost.

Setup->process->automation->sales process -> new

Stage	Fields	Guidance for Success
New	Application Submitted, Amount, Needs Insurance, Needs Waiver, Adventure Cost	- Ask customer about favorite vacations and activities - Share adventure photos from adventure record - Share testimonials from other explorers - Talk about the best time of year to go - Mention related adventures the customer might be interested in around the same time
Needs Information	Application Submitted, Needs Insurance, Needs Waiver	- Mention necessary waiver, insurance, certifications, etc upfront - Ask - "Is there anything else you'd like to know or need in order to submit your forms?" - Follow up for all application forms
Negotiation	Discount, Promo Code, Adventure Cost, Amount	- If the buyer seems likely to walk away from the deal, discount 10% - If the buyer negotiates, and there are more than 5 people involved, you can discount up to 25% - Use the promo "CUST05" for an instant 5% rebate if there is no negotiation involved. Leave discount blank in this case. Tell the customer about complimentary rebate.
Negotiation Rejected	Discount, Adventure Cost, Amount	- Adjust discount based on package owner feedback - Renegotiate with new adjusted discount - Log renegotiation details before changing status to awaiting approval
Awaiting Approval	Discount, Adventure Cost, Amount	Post your negotiation justification into the Chatter feed and @mention package owner
Deposit Made	n/a	- Follow up on questions or needs from explorer - Contact fulfillment team about special needs or scheduling details

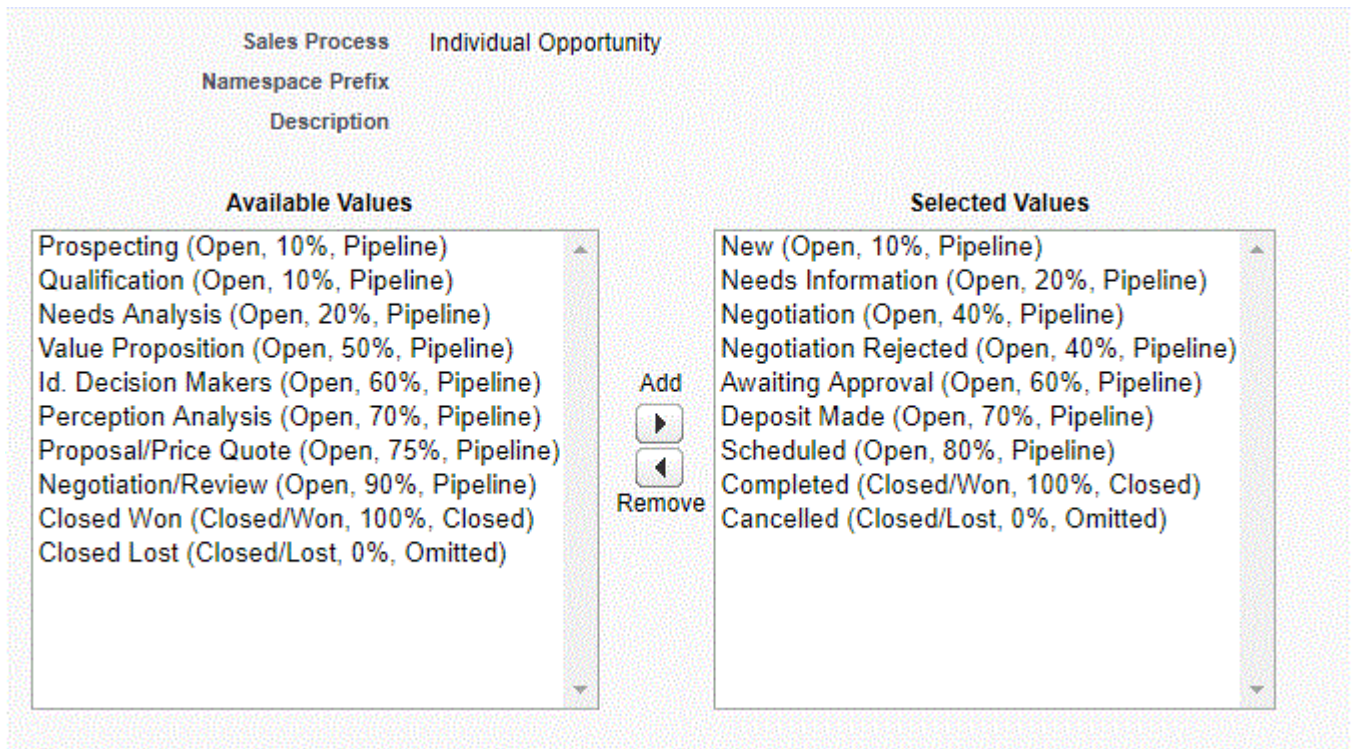**Table 1 : Sales Process Automation Requirements**

Figure 15: Sales Process

Opportunity Discount Approvals

A big part of closing deals is the art of creative discounting. Of course, you can't just give trips away for free, so you set up an approval process for all opportunities with discounts.

This approval process, called **Approval for Package Deal**, is available whenever the opportunity stage is Awaiting Approval, and it assigns approvals back to the opportunity owner. If the opportunity owner approves the discount, the opportunity record's stage is set to Scheduled. Otherwise, set the stage to Negotiation Rejected.

You notice that the Discount field isn't required; not wise considering you'll be working with it for automating the approvals process. You require the field and set the default value to 0.

Steps: setup->approval process -> new approval process

In approval process there is a criteria setup where we assign some numbers to the process and expect them to run in that order.

Figure 16: Approval Process

Process Builder

Create a process named **Fulfillment Creation** to automatically create a fulfillment record in Salesforce whenever an adventure package is created.

Fulfillment Object Field	Populate from this Object	Using this Field
Adventure Package Cost	Adventure Package (Opportunity Product)	Total Price
Expedition Leader (lookup)	Adventure (Product2)	Expedition Leader
Adventure (lookup)	Adventure Package (Opportunity Product)	Product
Opportunity (lookup)	Adventure Package (Opportunity Product)	Opportunity
Explorer (lookup)	Adventure Package (Opportunity Product)	Explorer
AdventurePackageID	Adventure Package (Opportunity Product)	Id
Name	Adventure Package and Adventure (Opportunity Product and Product2)	Adventure Name - Adventure Package Id
Schedule Date	Adventure Package (Opportunity Product)	Date

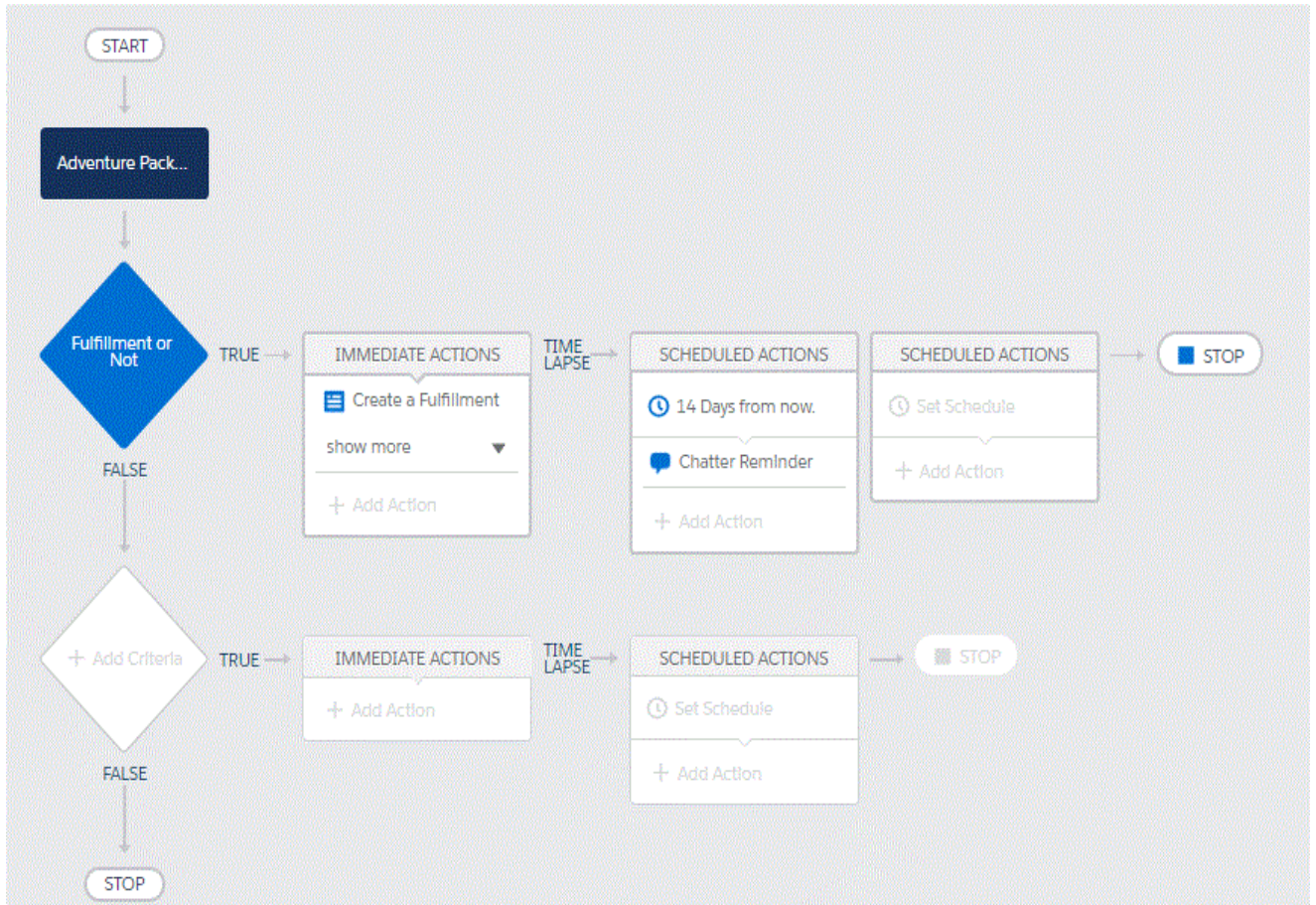**Table 2 : Approval Process Requirements**

Figure 17: Fulfilment Process

As long as the opportunity stage is not Cancelled at the time an adventure is added and a fulfillment has not already been created for the adventure package, you create a new fulfillment record, and automatically populate several fields from the opportunity, adventure, and adventure package data.

Sales Automation

You want to make some additional changes to further automate your sales process. Create another process named **Sales Automation**.

You'll customize three opportunity stages with automation for each stage.

Stage	Process
Awaiting Approval	If the status changes to awaiting approval and there is a positive discount value, kick off the discount approval process. If no discount is applied, the status updates to Scheduled because no approval is needed when a package is purchased at full price.
Deposit Made	After a deposit has been made, it's reflected on all fulfilment records related to the opportunity by setting the fulfillment status to Paid Deposit.
Cancelled	If an opportunity is cancelled, it's reflected on all fulfilment records related to the opportunity by setting the fulfillment status to Cancelled.

Table 3 : Sales Process Requirements

Fulfillment Cancellation Automation

Create a third process named **Fulfillment Cancellation Automation** to handle cleaning up data if an opportunity is cancelled. If the fulfillment is cancelled before the scheduled adventure date, the explorer loses only their deposit. In this case, find the original adventure package that triggered the creation of the fulfillment record and update the sales price to equal only the deposit amount.

Update the Adventure Package Fulfillment Creation field to true.

Update the related Opportunity to reflect the waiver and insurance needs on the Adventure.

- Set the 'Needs Insurance' field on the Opportunity to match the 'Needs Insurance' field on the Adventure record.

- Set the 'Needs Waiver' field on the Opportunity to match the 'Needs Waiver' field on the Adventure record.

  Create a task for the sales rep to review the fulfillment, and remind rep to double check the explorer data is properly mapped to the fulfillment record.

- Assign a task to the opportunity owner.
- Add this task to the opportunity with Priority = Normal, Status = Not Started, and Subject = any sentence you choose to explain the task.

  As an extra precaution, you decide to create one more future action to remind reps to check the adventure package and fulfillment records.

- Schedule a chatter post for the opportunity owner for 14 days from today.
- Include the Adventure Name, Opportunity Name, and Adventure Package Id in the post.

3.2 Requirements

Hardware Requirements

RAM: 4GB RAM

Monitor Resolution : 1024 x 768

Primary Memory : 1 GB or HigherRAM

Internet Speed : 4 Mbps

Software Requirement

Client Side   : IE / chrome

Development platform: VS 2017

OS   : Windows7 & above/ linux

CHAPTER – 4 PERFORMANCE ANALYSIS

1. Administrator Functions

S. No	Condition	Expected	Status
1.	Addition of User by Process	Successfull created user	Pass
2.	Retrived the data of user	Succesfull retrived the customer data	Pass

Table 4 : Performance Analysis Table

CHAPTER – 5 CONCLUSIONS
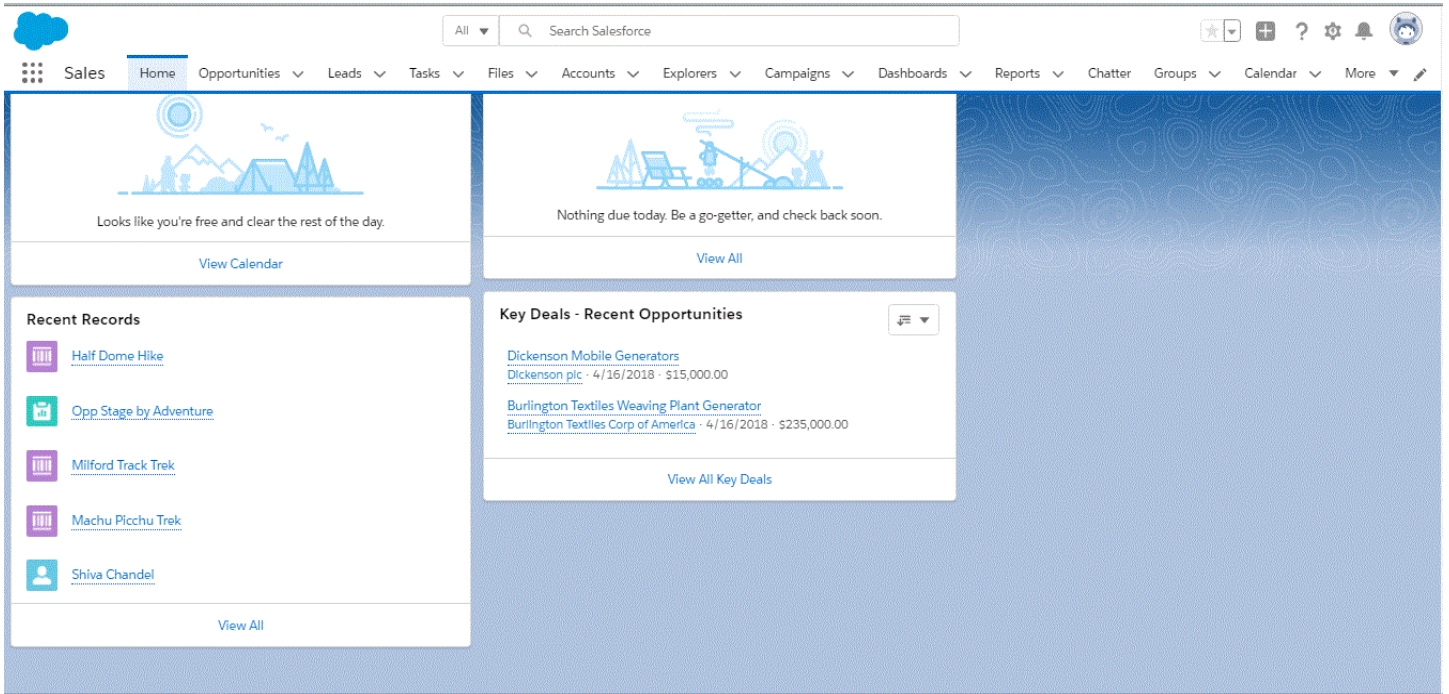
5.1 Conclusions

Figure 18: Home Page

All the goals are achieved well and the customization of the salesforce platform is as per the requirements defined. Like the Admin is well able to make changes to the platform and further more the users of the company are able to use it in well manner . And in some cases where the information is required on a go it is always present their with a click.

5.2 Future Scope

The main goal of this was to automate some of the processes like sales and services which were achieved well by the admin and further more the other future scope the company hold is far more than anyone's expectation. The can make more further changes in the automation processes and make it lightning .

Can also make the use of User Community so that the users can communicate well among themselves and if you need to give any update or information to the users you can do that.

5.3 Goals Achieved

- The users are able to use the application easily.
- Easy, convenient and efficient for data retrival
- The goal of customizing the salesforce is well done by admin.
- Automation of the processes.
- Helped the company to reach customers easily.
- All data of the customers is at one place.

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