



# GOVERNMENT OF TAMILNADU

## Naan Muthalvan -Project-Based Experiential Learning

### JOB APPLICATION TRACKING SYSTEM

Submitted by

**P.ABINAYA -(20321ER001)**

**S.ASMA PARVEEN - (20321ER002)**

**P.BHARATHI - (20321ER003)**

**M.CHANDRA – (20321ER004)**

**TEAM ID - NM2023TMID19271**

**Under the guidance of**

Mrs.V.G.Srirajeswari M.Sc., M.Phil., B .Ed

**Guest Lecturer**

**PG and Research Department of Mathematics**



**M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN**

B(Affiliated To Mother Teresa Womens University, Kodaikanal)

Reaccredited with " A" Grade by NAAC

**DINDIGUL-624001.**

**APRIL-2023**

**M.V.MUTHIAH GOVERNMENT ARTS COLLEG FORWOMEN**

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**Dindigul-624001**



**PG & RESEARCH DEPARTMENT OF MATHEMATICS**

**BONAFIDE CERTIFICATE**

This is to certify that this is a bonafide record of the project entitled, "**JOB APPLICATION TRACKING SYSTEM**" done by **Ms. P.ABINAYA (20321ER001), Ms. S.ASMA PARVEEN (20321ER002), Ms. P.BHARATHI (20321ER003), Ms. M.CHANDRA (20321ER004)**. This is submitted in partial fulfillment for the award of the degree of **Bachelor of Science in Mathematics in M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN, DINDIGUL** during the period of December 2022 to April 2023.

**Project Mentor(s)**

**Head of the Department**

**Submitted for viva-voce Examination held on 12.04.2023**

# PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

## 1 INTRODUCTION

### 1.1 Overview

Develop an App for the Property Management where Buyer can order his Requirements and get the Appropriate Details of the Property. According to his interest just provide him with some discounts what extent he can get the discount. Also Track Whether he is Interested in taking the loan available for so just calculate how much loan Amount user can get it. Provide the Security for two different profiles like for marketing and sales team. Then Finally Create the reports and dashboards so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal.

### 1.2 Purpose

- Salesforce property management enables the realty managers to keep track of crucial data about financial and household properties incorporating associated cash flow, primary tenants, and occupancy rates.
- Property managers assist owners in creating budgets, advertise rental properties, qualify tenants, and collect rent.
- Property Management helps marketing, sales, commerce, service and IT team work as one from anywhere.
- Track emails, calls, and set tasks to connect with the right buyers, sellers, and renters at the right time.

## 2 PROBLEM DEFINITION AND DESIGN THINKING

### 2.1 Empathy map

An empathy map is a collaborative tool teams can use to gain a deeper insight into their customers. An empathy map can represent a group of users, such as a customer segment.



### 3 RESULT

#### 3.1Data Model

Object name	Fields in the Object	
Buy		
	Field label	Data type
	Property type	Picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
	Annual amount to be paid	Picklist
Rent		
	Field label	Data type
	Rent	Auto number
	Rental City	Text
Loan		
	Field label	Data type
	Loan Id	Auto number
	Interest rate	Currency
	Term	Number
	Annual Loan	Number
	Total loan	Number

		Instalments		
		Loan Repayment	Currency	
		Loan amount	Formula	
Student				
		Field label	Data type	
		Lead	Auto Number	
		State	Picklist	
		City	Picklist	
		Email	Email	
		Phone	Phone	

### 3.2 Activity and Screenshot

#### Salesforce:

##### Creating Developer Account

Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developers.salesforce.com/)
2. Click on sign up.
3. On the sign up form, enter the following details :
  - a. First name & Last name
  - b. Email
  - c. Role : Developer
  - d. Company : College Name
  - e. County : India
  - f. Postal Code : pin code

g. Username : should be a combination of your name and company. This need not be an actual email id, you can give anything in the format : username@organization.com Click on sign up after filling these.

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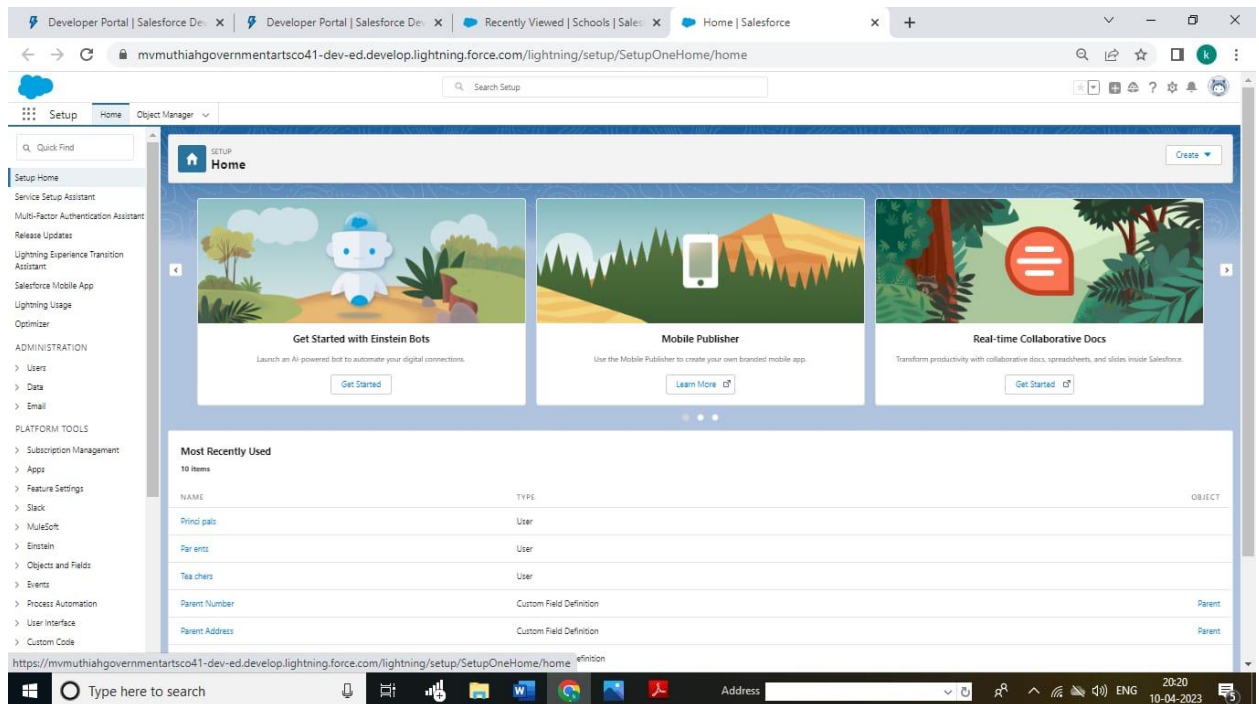
FEEDBACK

Waiting for privacyportal.onetrust.com...

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Address

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10-04-2023



## Objects:

### To Navigate to Setup page:

1. Click on gear icon → click setup.

### To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom object.

### On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search → Save

## Create Object Buy

1. To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

3. Enter the label name → Buy



4. Plural label name→ Buyers

5. Click on Allow reports,

6. Allow search → Save

### **Create Object Rent**

1. To create an object:

2. From the setup page → Click on Object Manager → click on Create → Click on Custom Object.

3. Enter the label name →Rent

4. Plural label name→ Rents

5. Click on Allow reports,

6. Allow Search -> Save

### **Create Object Loan**

7. To create an object:

8. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

9. Enter the label name →Loan

10. Plural label name→ Loans

11. Click on Allow reports,

12. Allow search → Save

Browser tabs: (1) WhatsApp, Buy | Salesforce, Edit Custom Object Buy - Sales...

Address bar: mvmtuthaiahgovtartscollegefo-dev-ed.develop.my.salesforce.com/0112w000003bHck/e?appLayout=setup&noS1Redirect=true

Search bar: Search...

Navigation bar: Home, Chatter, Libraries, Content, Subscriptions, Buyers, Rents, Loans, Students, Marketins, Sales, Dashboards, Lead with loan amounts

Left sidebar: Quick Find / Search..., Expand All | Collapse All, Lightning Experience Transition Assistant, Salesforce Mobile Quick Start, Home, Administer (Release Updates, Manage Users, Manage Apps, Manage Territories, Company Profile, Data Classification, Privacy Center, Security Controls, Domain Management)

Main content area: Edit Custom Object Buy, Custom Object Definition Edit, Custom Object Information, Object Name: Buy, Description: Money, Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window

Browser tabs: Home | Salesforce

Address bar: mvmtuthaiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...

Search bar: Search Setup

Navigation bar: Setup, Home, Object Manager

Left sidebar: Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Subscription Management, Apps, Feature Settings, Slack, MuleSoft, Einstein)

Main content area: New Custom Object Tab, Step 1. Enter the Details, Choose the custom object for this new custom tab. Fill in other details, Select an existing custom object or create a new custom object now, Object: Buy, Tab style: Car, (Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab, Splash Page Custom Link: None, Enter a short description, Description: , Next, Cancel

Home | Salesforce

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Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

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Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Slack

MuleSoft

Einstein

### SETUP Tabs

## New Custom Object Tab

Step 2. Add to Profiles Step 2 of 3

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

☒ Apply one tab visibility to all profiles **Default On**

☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On

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Subscription Management

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Feature Settings

Slack

MuleSoft

Einstein

### SETUP Tabs

## New Custom Object Tab

Step 3. Add to Custom Apps Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>

Buy | Salesforce

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Apps Gmail YouTube Maps

Search Setup

Setup Home Object Manager

### SETUP > OBJECT MANAGER

#### Buy

**Details**

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

**Details**

Description

API Name  
Buy\_\_C

Custom

Singular Label  
Buy

Plural Label  
Buys

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Trainers

https://mvmuthiahgovernmentartscs80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kaX9/Details/view

Type here to search

17:52 10-04-2023

(1) WhatsApp

Rent | Salesforce

Edit Custom Object Rent - Sale

mvmuthiahgovartartscollegefo-dev-ed.develop.my.salesforce.com/0112w000003bjb8/e?appLayout=setup&noS1Redirect=true

Switch to Lightning Experience Saranya S Setup Help Content

Home Chatter Libraries Content Subscriptions Buyers Rents Loans Students Marketins Sales Dashboards Lead with loan amounts

Quick Find / Search... Expand All | Collapse All

Lightning Experience Transition Assistant

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Get Started

Salesforce Mobile Quick Start

Home

Administrator

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management

### Custom Object Definition Edit

Save Save & New Cancel

#### Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

#### Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

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Lightning Usage Optimizer

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Einstein

## SETUP Tabs

### New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object: **Rent**

Tab Style: **Computer**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: **None**

Enter a short description

Description:

**NEXT** **CANCEL**

Home | Salesforce

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Lightning Usage Optimizer

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Apps

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MuleSoft

Einstein

## SETUP Tabs

### New Custom Object Tab

Step 2. Add to Profiles Step 2 of 3

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

☒ Apply one tab visibility to all profiles (Default On)

☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On

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Salesforce Mobile App

Lightning Usage

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SETUP Tabs

Step 3. Add to Custom Apps

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Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>

Type here to search

17:57 10-04-2023

Rent | Salesforce

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Rent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name  
Rent\_\_c

Custom

Singular Label  
Rent

Plural Label  
Rents

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

16:03 10-04-2023



Object Manager | Salesforce

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Search Setup

Setup Home Object Manager

### Object Manager

#### New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tailor one more!](#) [Don't show this message again.](#)

**Custom Object Definition Edit** Save Save & New Cancel

**Custom Object Information** Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Type here to search

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Search Setup

Setup Home Object Manager

### Setup Tabs

#### New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object

Tab Style

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link

Enter a short description. Description

Next Cancel

Type here to search

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### SETUP Tabs

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Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On

Type here to search

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High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>

Type here to search

17:57 10-04-2023



Object Manager | Salesforce

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Plural Label  Example: Accounts

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Object Name  Example: Account

Description

Context Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Content Name

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

---

Student | Salesforce

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Setup Home Object Manager

### Object Manager

#### Student

Details Edit Delete

**Details**

Description

API Name

Custom ☒

Singular Label

Plural Label

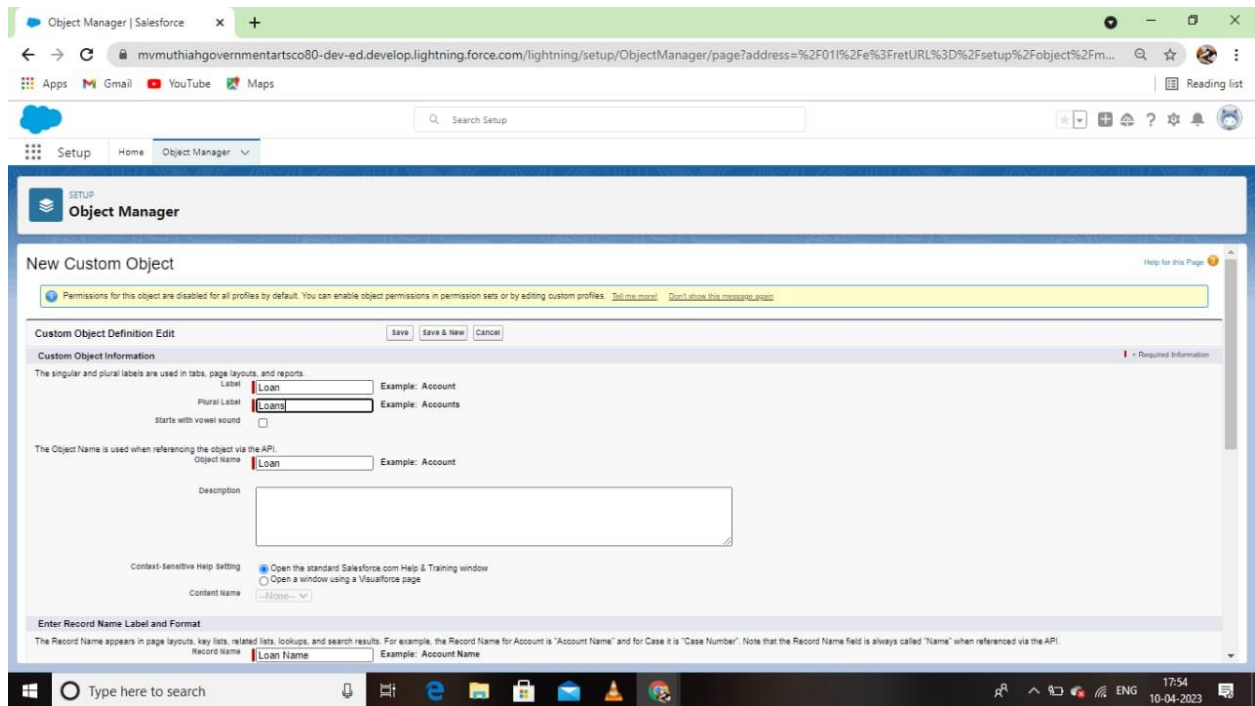
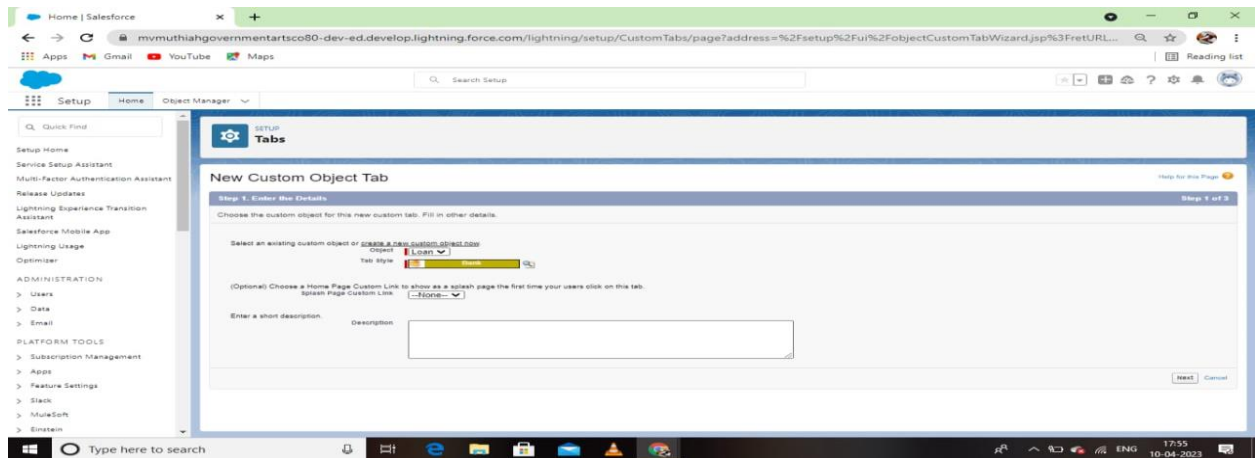
Enable Reports ☒

Track Activities ☒

Track Field History ☒

Deployment Status ☒

Help Settings



Object Manager | Salesforce

mvmuthiahgovernmentartscsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F011%2Fe%3FretURL%3D%2Fsetup%2Fobject%2Fm...

Apps Gmail YouTube Maps

Search Setup

Setup Home Object Manager

### Object Manager

#### New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tailor one more!](#) [Don't show this message again.](#)

**Custom Object Definition Edit** Save Save & New Cancel

**Custom Object Information** Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Home | Salesforce

mvmuthiahgovernmentartscsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...

Apps Gmail YouTube Maps

Search Setup

Setup Home Object Manager

### Setup Tabs

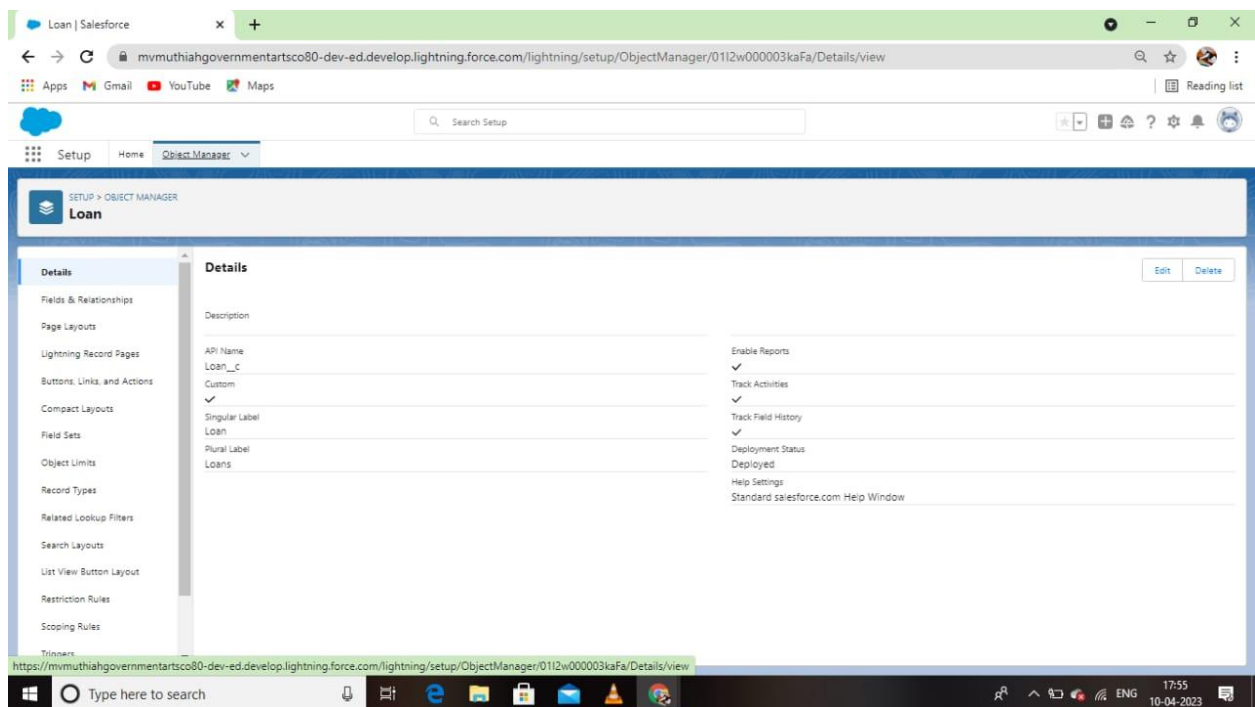
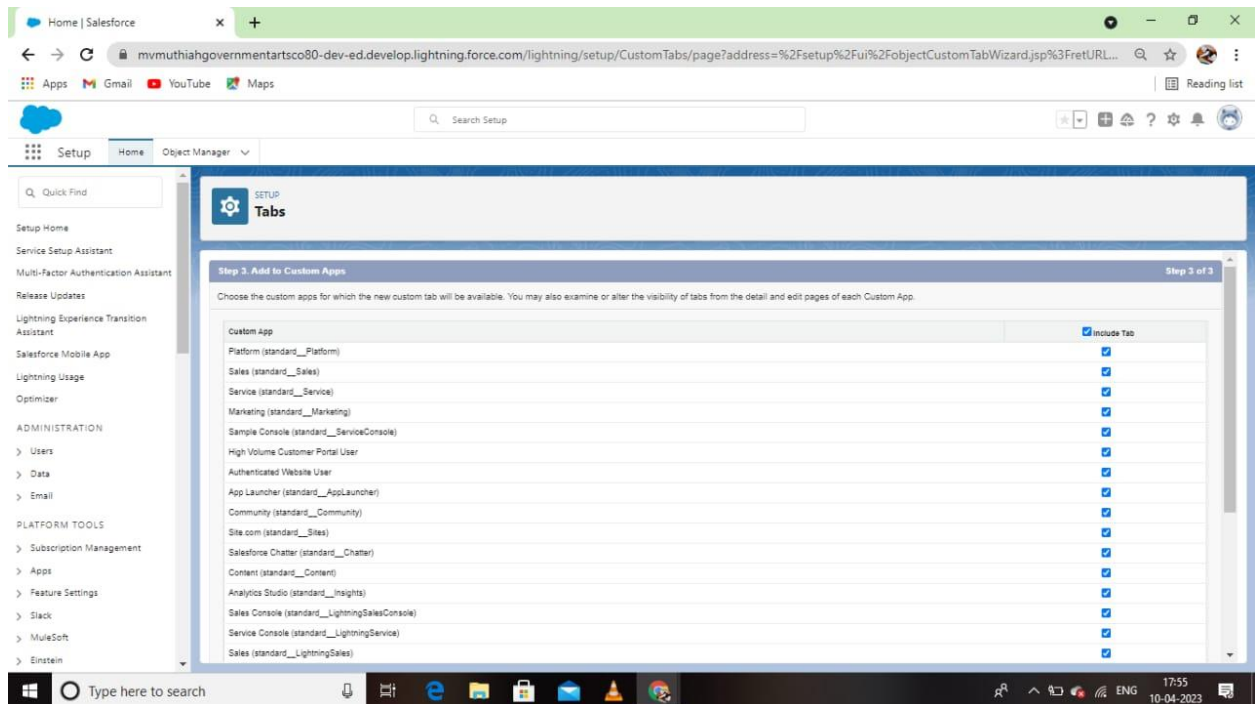
#### New Custom Object Tab

Step 2. Add to Profiles Step 2 of 3

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

☒ Apply one tab visibility to all profiles (Default On) ☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On



**Tab:**

**Create the Lightning**

**Tab to create a Tab: (Lead)**

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object (Lead) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → save

### **To create a Tab :(Buy)**

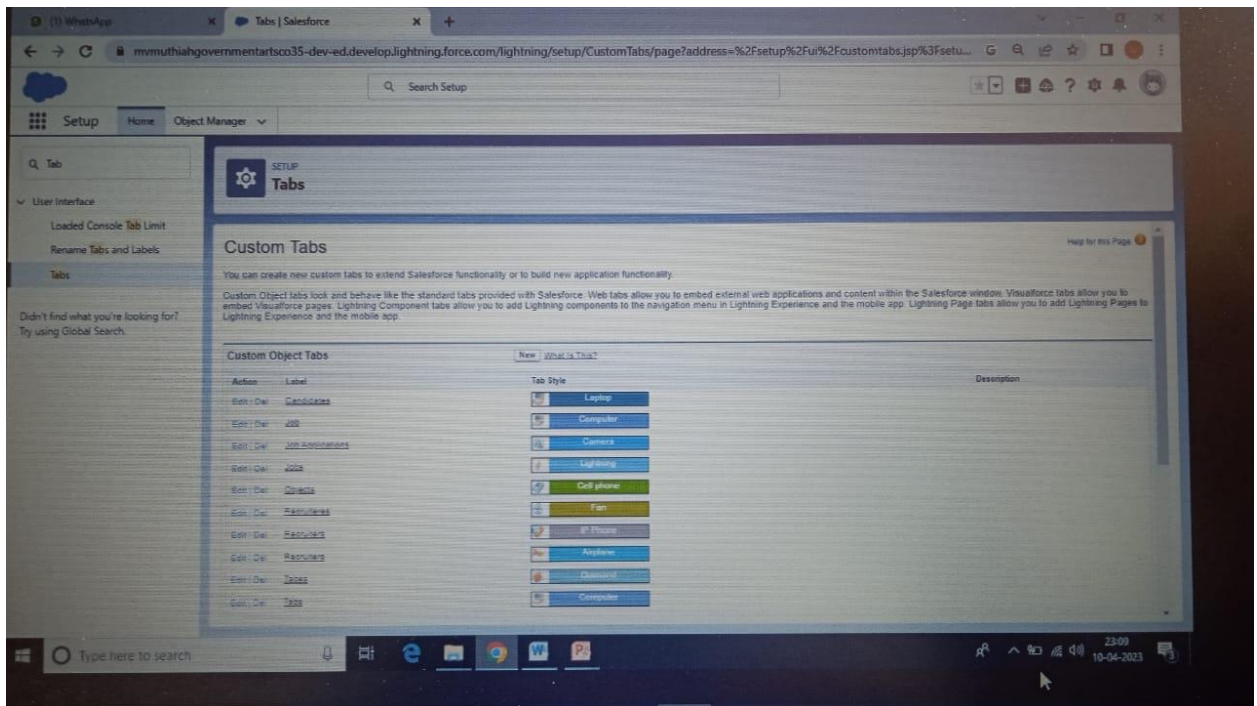
1. Select Object(Lead) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save→ Save

### **To create a Tab :(Rent)**

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object (Rent) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save

### **To create a Tab :(Loan)**

- 1.Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object (Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save



## Lightning App:

### Create the Lightning App

1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.
2. Fill the app name as an Property Management in app details and branding → Next → (App option page) keep it as default → Next
3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform user, Standard User → Next
4. To Add Navigation Items:  
Select the items from the search bar and move it using the arrow button → Next

## 5. To Add User Profiles:

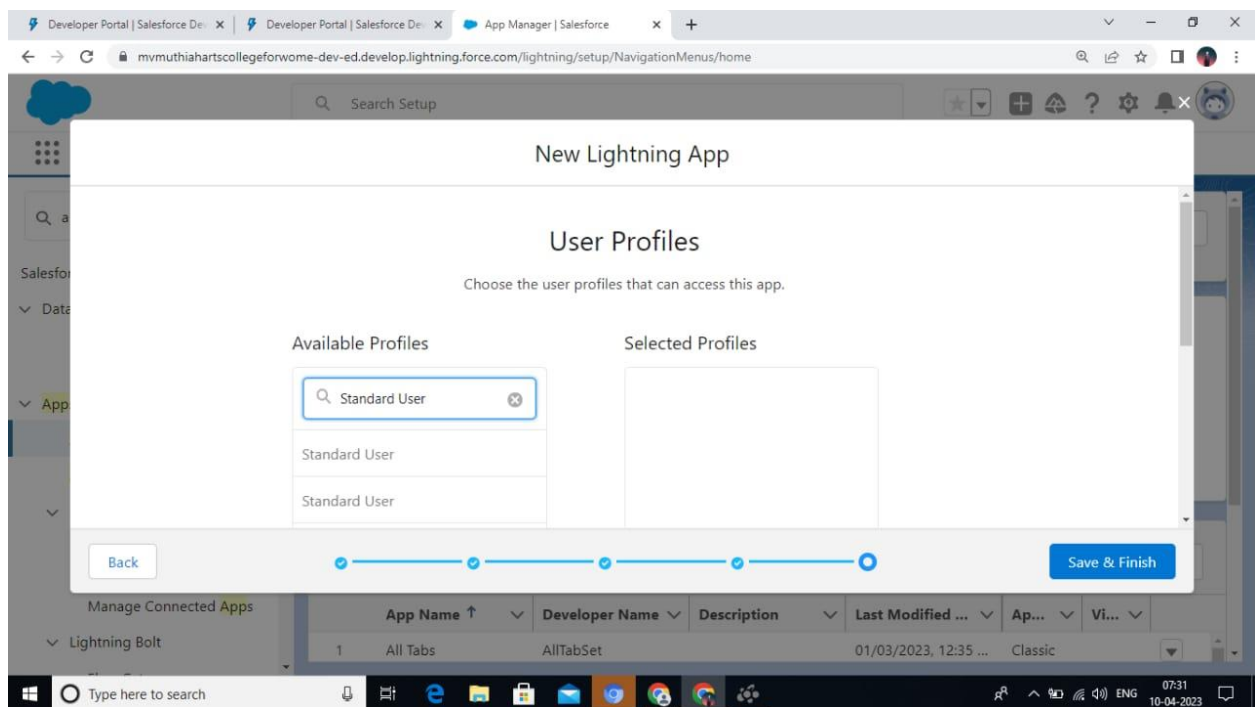
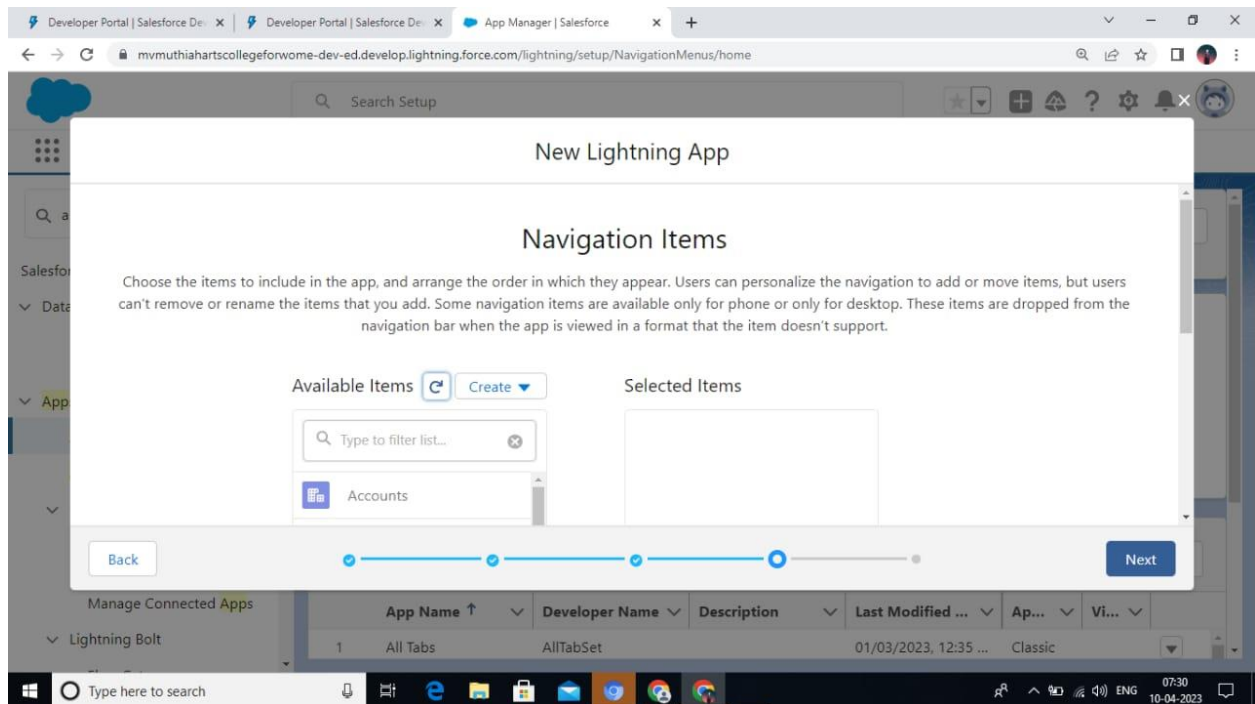
Search profiles in search bar → click on the arrow button → save & finish.

The screenshot shows the 'App Details & Branding' configuration page in the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.'

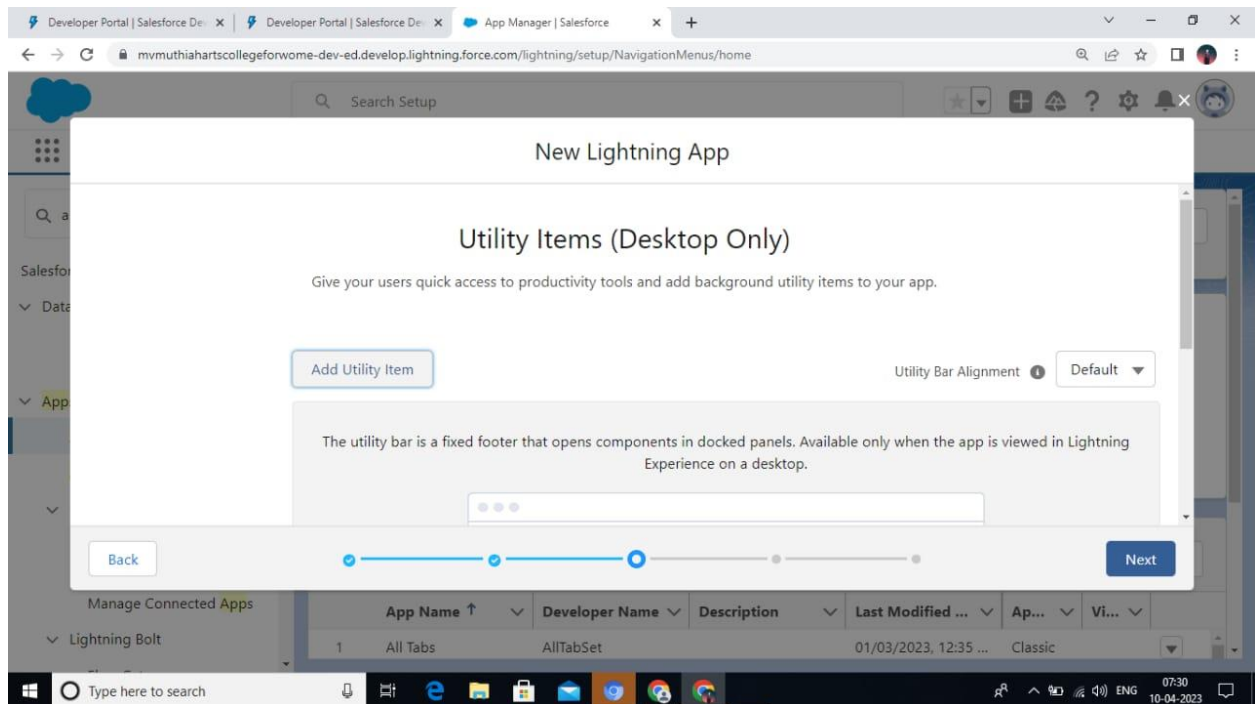
The configuration is divided into two columns:

- App Details:**
  - \* App Name:** Property Management
  - \* Developer Name:** Property\_Management
  - Description:** Enter a description...
- App Branding:**
  - Image:** A placeholder box with an 'Upload' button.
  - Primary Color Hex Value:** #0070D2
  - Org Theme Options:** A checkbox labeled 'Use the app's image and color instead of the org's custom theme' is currently unchecked.
  - App Launcher Preview:** A preview showing a blue square icon with 'PM' and a grey rectangle with the text 'Property Management'.









## Fields:

### Create the Lead Field

1. Go to setup → click on Object Manager → type object name in search bar → click on the object.
2. Now click on “Fields & Relationships ” → New.
3. Fill the field label name Lead → Next → Next → Save.

Create the remaining Fields:

Follow the Above Steps to create the Field just change the Labels for Below Fields Lead:(AutoNumber Created Field while creating Object) → L-{0000}

State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency) City: Create the Picklist (Mumbai, Pune, Nashik)(Field Dependency)

Email: Create the Email Select the Data Type as Email (Email)

Phone: Select the Field Data type as (Phone)

## For Object Buy

1. Create Field for Buy
2. Create Property Type: (Picklist) (Residential, Commercial, Industrial)
3. Discount: (Percentage As the Field Data Type)
4. State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
5. City: (Take Any City for Field Dependency)
6. Annual Amount To Be Paid

## Create Field for Rent

1. Rent: (Auto Number while Creating the object) → R-{0000}
2. Rental City: Select the Text as the Field Data Name (Any City)
3. BHK type: (Picklist) (1BHK, 2BHK,3BHK)

## Create Field for Loan

1. Loan Id: Auto generated Field Take it as Autonumber LN-{0000}
2. Interest Rate: (Select the Field Data Type As Currency)
3. Term:(Select the Field Data type as Number)
4. Annual Loan Field create the Number as the field data type
5. Total Loan Instalments :( Field create the Number as the field data type)
6. Loan Repayment ( Field create the Number as the field data type)
7. Loan Amount(Select the field data type as Formula)
8. For the Loan Object→ Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula (Loan\_Repayment\_\_c \* (((1+( Interest\_rate\_\_c /52)) ^ Term\_\_c) -1))/(( Interest\_rate\_\_c /52)\*((1+( Interest\_rate\_\_c /52)) ^ Term\_\_c)) ##Check the syntax below whether the formula syntax is correct or not

WhatsApp x Property Management: Definitio x Buy | Salesforce x +

mvmuthaiahgovartartcollegefo-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003bHck/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**Buy**

Details

**Fields & Relationships**

10 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

Buy	Buy__c	Percent(18, 0)		
Buy Name	Name	Text(80)	✓	
City	City__c	Picklist		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Property Type	PropertyType__c	Picklist		
State	State__c	Picklist		

WhatsApp x Property Management: Definitio x Rent | Salesforce x +

mvmuthaiahgovartartcollegefo-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003bJb8/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**Rent**

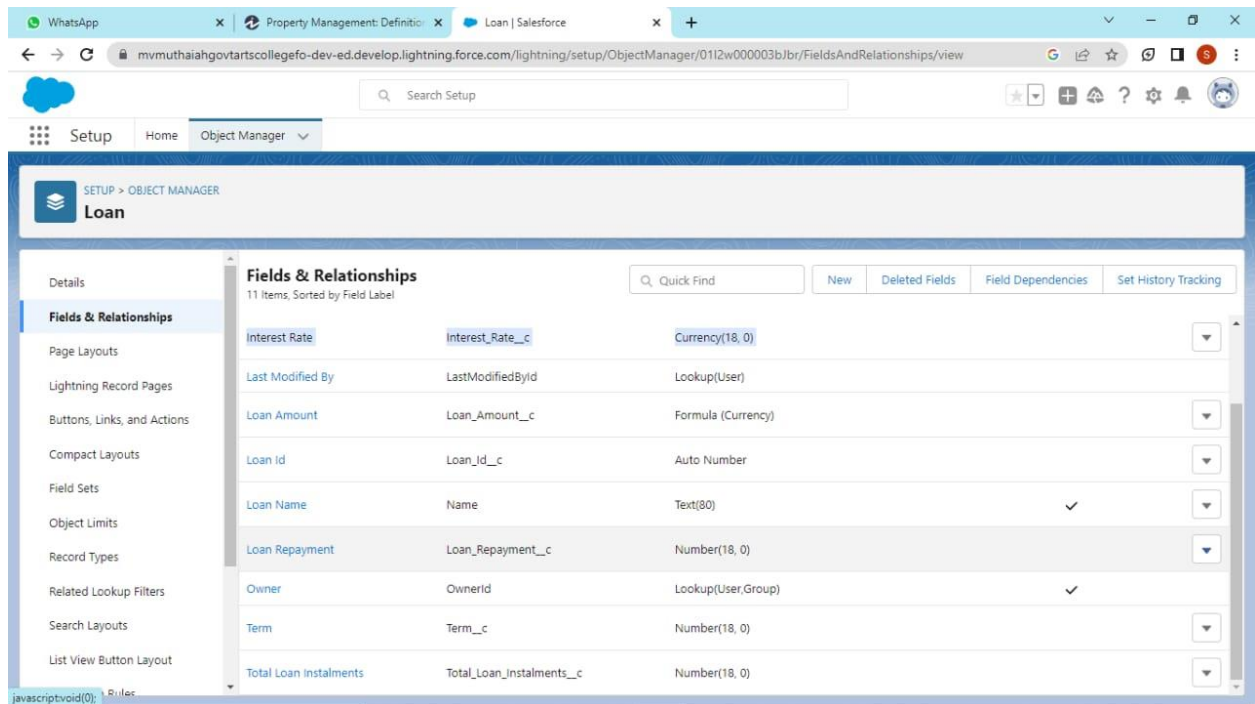
Details

**Fields & Relationships**

7 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK type	BHK_type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent	Rent__c	Auto Number		
Rent Name	Name	Text(80)		✓
Rental City	Rental_City__c	Text(1)		



## Profile:

### To create a new profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (standard user is preferable) → enter profile name → save
2. Enter a Profile Name
3. Click on the new created profile
4. While still on the profile page, then click Edit
5. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile
6. Sales Manager → Standard user Profile , Marketing Executive1 and Executive2 → Standard Platform User, Marketing Manager → Standard Platform user For

## Create Marketing

1. Then In The Profile Level Give Read and Create Access to Marketing Executive and Read, Create, Edit, Delete for the Marketing manager
2. Marketing Manager Should Have Access to Marketing Executive

## Sales:

1. In the Profile Level Sales Manager is Having Create, Edit, Delete
2. For Sales Rep1 → Read, Create, Edit
3. For Sales Rep2 → Read, Create, Edit
4. For Sales Rep3 → Read only

The screenshot displays the Salesforce Setup interface. The left sidebar shows the 'Setup' menu with 'Profiles' selected. The main content area is titled 'SETUP Profiles' and shows the 'Standard User' profile. Below the title, there is a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.' A section titled 'Profile Detail' includes fields for 'Name' (Standard User), 'User License' (Salesforce), and 'Description'. There are also buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. A 'Custom Profile' checkbox is checked. At the bottom, a list of enabled permissions is shown, including 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Flow Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a search bar with 'pro' and a list of categories: Users, Profiles, Data, Feature Settings, Marketing, Sales, and Products. The main content area displays the 'Buy' profile details.

**Profile: Buy**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Settings Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

**Profile Detail** [Edit] [Clone] [Delete] [View Users]

Name	Buy	Custom Profile	✓
User License	Salesforce		
Description			
Created By	PABINAYA, 30/03/2023, 11:54 am	Modified By	PABINAYA, 30/03/2023, 11:54 am

**Page Layouts**

Standard Object Layouts			
Global	<a href="#">Global Layout</a> [View Assignment]	Object Milestone	<a href="#">Object Milestone Layout</a> [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	<a href="#">Operating Hours Layout</a> [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	<a href="#">Opportunity Layout</a> [View Assignment]
Account	<a href="#">Account Layout</a>	Opportunity Product	<a href="#">Opportunity Product Layout</a>

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a search bar with 'profil' and a list of categories: Users, Profiles, Data, Feature Settings, Marketing, Sales, and Products. The main content area displays the 'Standard User' profile details.

**Profile: Standard User**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Settings Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

**Profile Detail** [Edit] [Clone] [Delete] [View Users]

Name	Standard User	Custom Profile	✓
User License	Salesforce		
Description			
Created By	PABINAYA, 10/04/2023, 10:42 am	Modified By	PABINAYA, 10/04/2023, 10:43 am

**Page Layouts**

Standard Object Layouts			
Global	<a href="#">Global Layout</a> [View Assignment]	Object Milestone	<a href="#">Object Milestone Layout</a> [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	<a href="#">Operating Hours Layout</a> [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	<a href="#">Opportunity Layout</a> [View Assignment]
Account	<a href="#">Account Layout</a> [View Assignment]	Opportunity Product	<a href="#">Opportunity Product Layout</a> [View Assignment]
Alternative Payment	<a href="#">Alternative Payment Method Layout</a>	Order	<a href="#">Order Layout</a>

## New User:

### Create User

1. Go to setup → type users in quick find box → select users → click

2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.

The screenshot displays the Salesforce Lightning Setup interface for the 'Users' section. The left sidebar shows a navigation menu with options like 'Lightning Usage', 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'User PABINAYA' and includes a 'User Detail' section with fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver. To the right of these fields are buttons for 'Edit', 'Sharing', 'Reset Password', and 'Freeze'. Further right, there are sections for 'Role', 'User License', 'Profile', and 'Active' status, each with a checkbox. The top of the page features a search bar and a 'Search Setup' button.

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays the URL: `mvmuthaiahgovartscollegefo-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/User/Details/view`. The page header includes the Salesforce logo and a search bar labeled "Search Setup". Below the header, the navigation menu shows "Setup" as the active section, with "Home" and "Object Manager" as sub-options. The main content area is titled "SETUP > OBJECT MANAGER" and "User". On the left, a sidebar lists various setup options under the "Details" section: Fields & Relationships, User Page Layouts, User Profile Page Layouts, Lightning Record Pages, Buttons and Links, Compact Layouts, Field Sets, Object Limits, Related Lookup Filters, Search Layouts, List View Button Layout, and Triggers. The main content area displays the "Details" for the "User" object, including a description, API Name (User), Custom, Singular Label (User), Plural Label (Users), Enable Reports, Track Activities, Track Field History, Deployment Status, and Help Settings (Standard salesforce.com Help Window).



# Permission Set:

## Create the Permission Sets

1. Go to setup → type “permission sets” in quick search → select permission sets → New.
2. Enter the label name → save.
3. After saving the permission click on the Manage assignment
4. Now click on the Add Assignment
5. Now select the users and click on save.
6. Go to permission set and add the access For Sales Rep3 give Access with Create permission for the user

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

**All Permission Sets** | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	<a href="#">Buyer</a>	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	<a href="#">Buyer Manager</a>	Includes all Buyer capabilities, and allows access to man...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	<a href="#">CRM User</a>	Denotes that the user is a Sales Cloud or Service Cloud ...	CRM User
<input type="checkbox"/> Clone	<a href="#">Commerce Admin</a>	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/> Clone	<a href="#">Contact Center Admin</a>	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/> Clone	<a href="#">Contact Center Agent</a>	Access agent features in Service Cloud Voice contact ce...	Service Cloud Voice User
<input type="checkbox"/> Clone	<a href="#">Contact Center Supervisor</a>	Access supervisor features in Service Cloud Voice conta...	Service Cloud Voice User
<input type="checkbox"/> Del   Clone	<a href="#">Experience Profile Manager</a>		Salesforce
<input type="checkbox"/> Clone	<a href="#">Facility Manager</a>	Lets users create, read, edit, and delete locations, subloc...	Facility Manager
<input type="checkbox"/> Clone	<a href="#">FieldServiceMobileStandardPermSet</a>	Give your mobile workforce access to the Field Service m...	Field Service Mobile
<input type="checkbox"/> Clone	<a href="#">Merchandiser</a>	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License S...
<input type="checkbox"/> Clone	<a href="#">Order Management Agent</a>	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	<a href="#">Order Management Operations Manager</a>	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	<a href="#">Order Management Shopper</a>	Limited access to Order Management features for Self S...	Lightning Order Management User

1-25 of 27 | 0 Selected | Page 1 of 2



Home | Salesforce

Permission Set Create

Enter permission set information

Label: Permission Set2

API Name: Permission\_Set2

Description:

Session Activation Required: ☐

Select the type of users who will use this permission set

Who will use this permission set?

- Choose "--None--" if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: --None--

Save Cancel

Home | Salesforce

Permission Set Permission Set2

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Permission_Set2
License	Namespace Prefix	
Session Activation Required	Created By	Saranya S. 10/04/2023, 8:56 pm
Last Modified By	Saranya S. 10/04/2023, 8:56 pm	

Apps

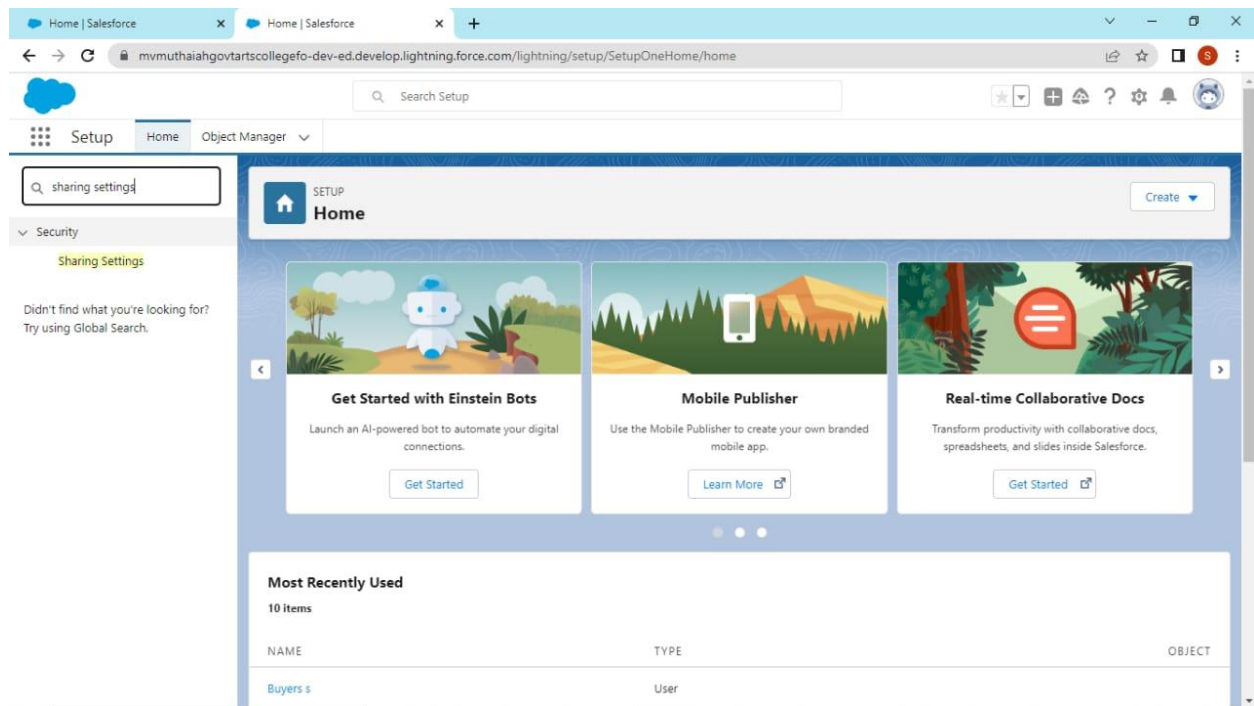
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

- Assigned Apps**  
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages
- External Data Source Access**  
Permissions to authenticate against external data sources

Setup for OWD:

## Create OWD Setting

1. Setup, use the Quick Find box to find Sharing Settings.
2. Click Edit in the Organization-Wide Defaults area.
3. For each object, select the default access you want to give everyone.
4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Lead, Rent custom object.
5. Click Edit and from the Drop Down select private for internal and external
6. This Setting is for all the User Which have been Created



Home | Salesforce x Sharing Settings | Salesforce x Sharing Settings - Salesforce - x +

mvmuthaiahgovartartcollegefo-dev-ed.develop.my.salesforce.com/p/own/OrgSharingDetail?appLayout=setup&noS1Redirect=true

salesforce Search... Search

Switch to Lightning Experience Saranya S Setup Help Content

Home Chatter Libraries Content Subscriptions Buyers Rents Loans Students Marketins Sales Dashboards Lead with loan amounts +

Quick Find / Search... Expand All | Collapse All

Lightning Experience Transition Assistant Move to the new, more productive Salesforce. Get Started

Salesforce Mobile Quick Start

Home

Administrator

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Security Alerts

## Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

### Default Sharing Settings

#### Organization-Wide Defaults

Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓

Home | Salesforce x Sharing Settings | Salesforce x Organization-Wide Sharing Defi x +

mvmuthaiahgovartartcollegefo-dev-ed.develop.my.salesforce.com/p/share/OrgDefaultSharing?id=00D2w00000RIH4H&retURL=%2Fp%2Fown%2F0rgSharingDetail%3Fa...

Imports

- Outbound Messages
- Time-Based Workflow
- Automated Process Actions
- Case Escalations
- Entitlement Processes
- API Usage Notifications
- Mass Emails
- Email Snapshots
- Jobs
- Logs

Service Contract	Private	Private	✓
Service Resource	Public Read/Write	Private	✓
Service Territory	Public Read/Write	Private	✓
Shift	Private	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Buy	Public Read/Write	Private	✓
Dashboard	Public Read/Write	Private	✓
Lead with loan amount	Public Read/Write	Private	✓
Loan	Private	Private	✓
Marketing	Private	Private	✓
Rent	Private	Private	✓
Sales	Private	Private	✓
Student	Private	Private	✓

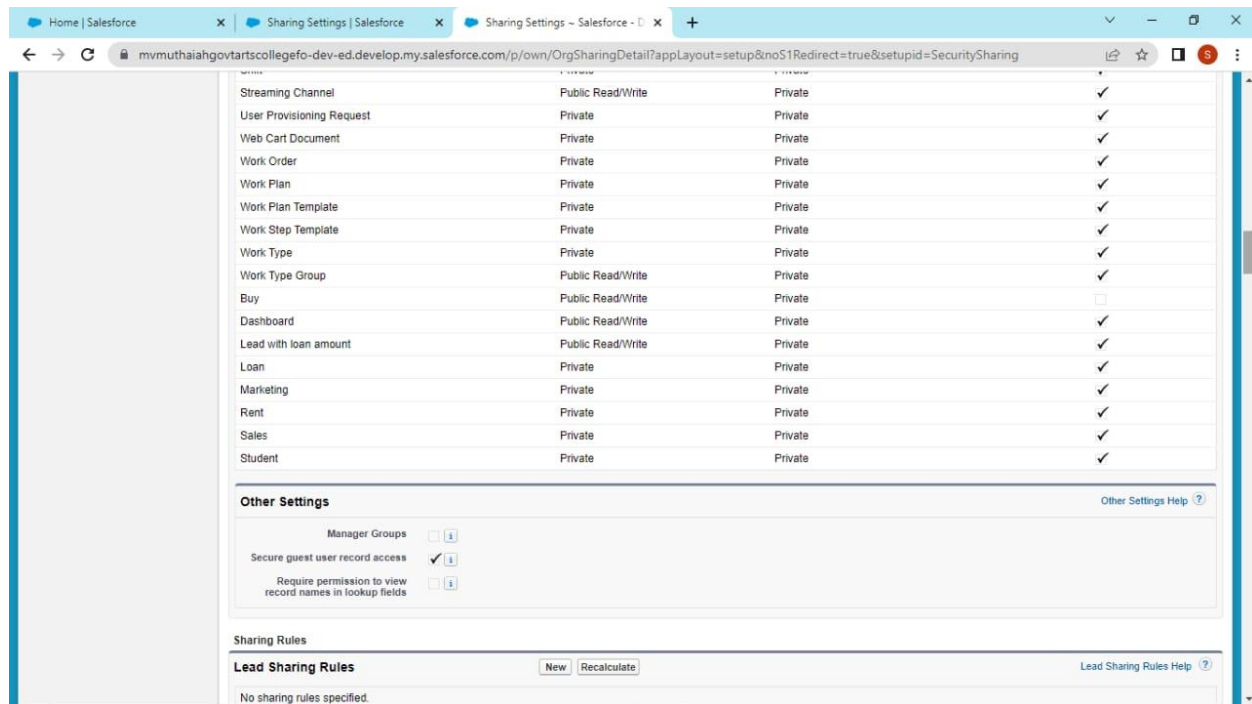
### Other Settings

Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐

Secure guest user Require permission to view record access ☐ record names in lookup fields ☐

Save Cancel

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## Marketing 1.

Create the Record Level OWD Setting give it As A Private To Marketing manager And Marketing Executive Sales:

1. Sale Manager OWD is Set As Private similarly sales Rep1, Sales Rep2 same OWD for them

## Report:

### Create Report

1. Go to the app → click on the reports tab
2. Click New Report
3. Select report type from category or from report type panel or from search panel → click on start report.
4. Customize your report, then save or run it.

### Create Report for following Condition

1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the Property
2. The Condition should be Like Loan Amount  $\geq$  to 5000\$

The screenshot shows a Salesforce Lightning Dashboard titled "New Lead With Loan Amount". The dashboard is viewed as Saranya S on 10-Apr-2023, 9:50 am. The dashboard layout includes five report widgets: "Loan Report", "Student", "Sales", "Marketins", and "Rent". Each widget displays a list of items with a search bar and a "View Report" link.

**Loan Report**

Loan: Loan Name ↑
Education loan
Home loan

[View Report \(Loan Report\)](#)

**Student**

Student: Student Name ↑
Santhosh
Saranya

[View Report \(Student\)](#)

**Sales**

Sales: Sales Name ↑
Home
Land

[View Report \(Sales\)](#)

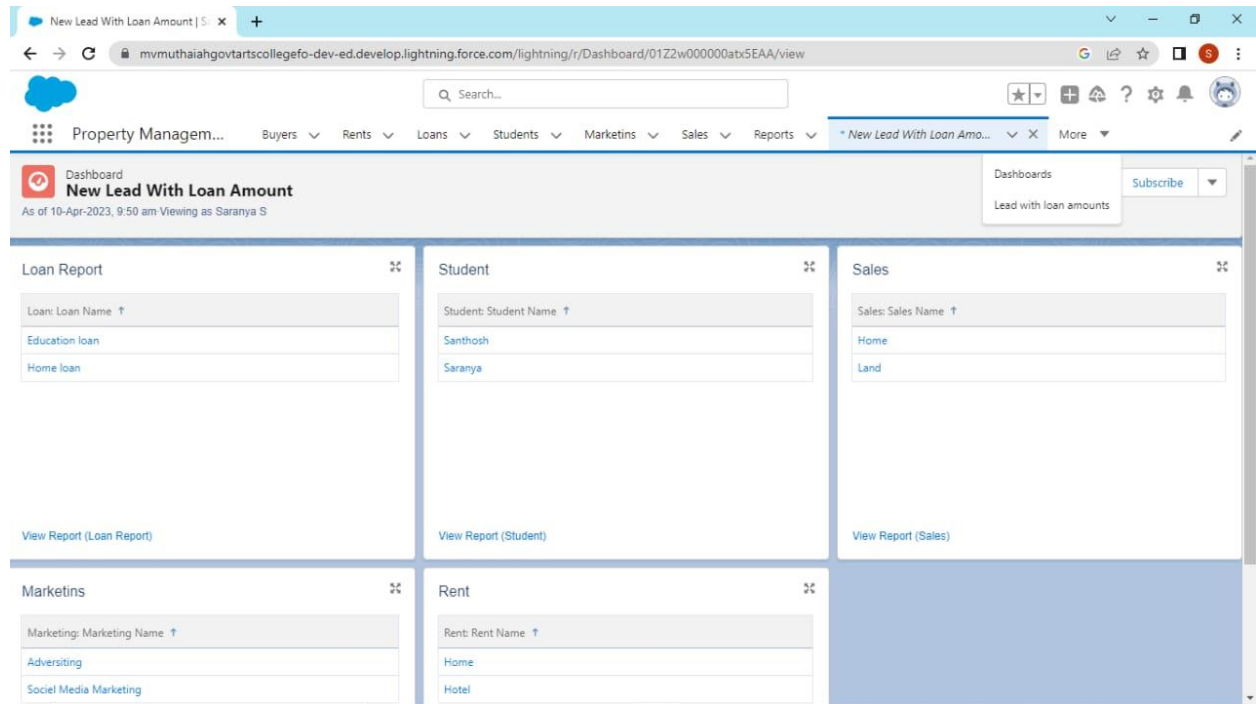
**Marketins**

Marketing: Marketing Name ↑
Adversiting
Sociel Media Marketing

**Rent**

Rent: Rent Name ↑
Home
Hotel

## Dashboards:



## Create dashboards

1. Go to the App Launcher and select the Dashboards
2. Select add component
3. Select the folder select the following option new lead with loan Amount
4. Select in which format you want display chart

## Create Dashboard

1. Create the Dashboard for the Same Take Any Type of Dashboard ( Chart)  
And Display It on The App Home Page

## 4 Trailhead Profile Public URL

Team Lead : <https://trailblazer.me/id/ebharathip>

Team Member 1: P. ABINAYA(20321ER001)

Team Member 2:S. ASMA PARVEEN(20321ER002)

Team Member 3:M. CHANDRA(20321ER004)

Team Leader : P. BHARATHI(20321ER003)

## 5 Advantages and Disadvantages

### Advantages:

- ❖ Manage pricing and inventories dynamically.
- ❖ Automate based on your business processes.
- ❖ Integrated with all major online travel portals.
- ❖ Maximize operational efficiency and profitability.
- ❖ Can be integrated with other AppExchange applications.

### Disadvantages:

- ❖ Configuration and setup is complex and time consuming.
- ❖ Cluttered interface makes navigation and simple tasks unnecessarily complex.
- ❖ The learning curve never seems to end.
- ❖ Customer support has a poor reputation
- ❖ Getting users to adopt the system.

## 6 Applications

- ✚ A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties.
- ✚ PMS is also used in manufacturing. A property management system is sometimes referred to as a hotel operating system or hotel OS.
- ✚ A property management system (PMS) is software that facilitates a hotel's reservation management and administrative tasks.
- ✚ The most important function include front-desk operations, reservations, channel management, housekeeping, rate and occupancy management, and payment processing.

## **7 Conclusion**

Man a company's sales force is important because it may help improve the efficiency and success of the sales team. This can help increase company revenue and create a positive work environment for sales team members.

## **8 Future scope**

We expect Salesforce to integrate data science and big data capabilities to its Service cloud and Marketing Cloud.

This would result in automated customer service tasks and would let marketers leverage data for predictive and targeted marketing.