



# **PROPERTY MANAGEMENT APPLICATION USING SALESFORCE**

**Project Based Experiential Learning Program**

Team ID : NM2023TMID35206

Team Size : 4

Team Leader : ASHWIN.S

Team member : TAMILSELVAN.J

Team member : HARIKUMAR.P

Team member : SELVAM.A

# **Property Management Application using Salesforce**

## **Project Description:-**

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 upto 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 dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal

### **What you'll learn**

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce

## **Milestone 1-Salesforce**

### **Introduction:**

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

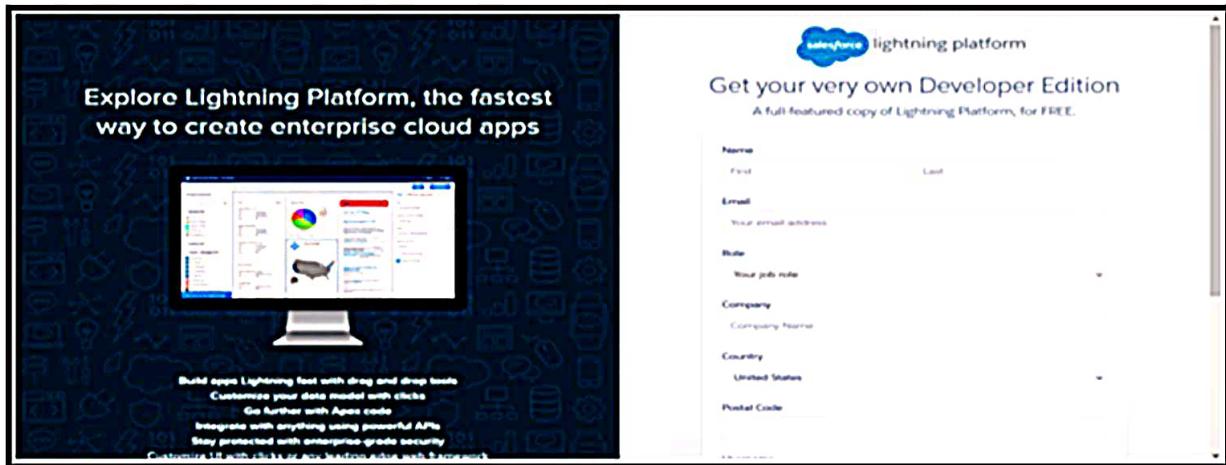
### **What Is Salesforce?**

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>



## Activity1:

### Creating Developer Account

Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developer.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 :

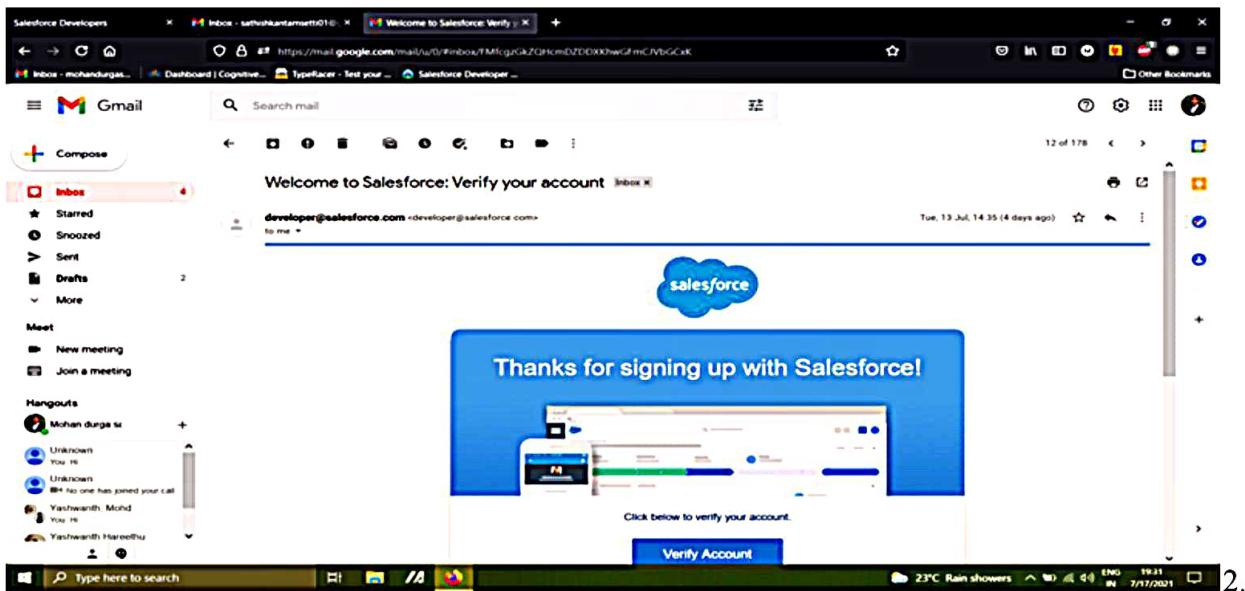
[username@organization.com](mailto:username@organization.com)

Click on sign up after filling these.

## Activity 2-

## Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



2. Login To Your Salesforce Account

## Milestone 2- Object

### What Is Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization.  
What are the types of Salesforce objects

#### Salesforce objects are of two types:

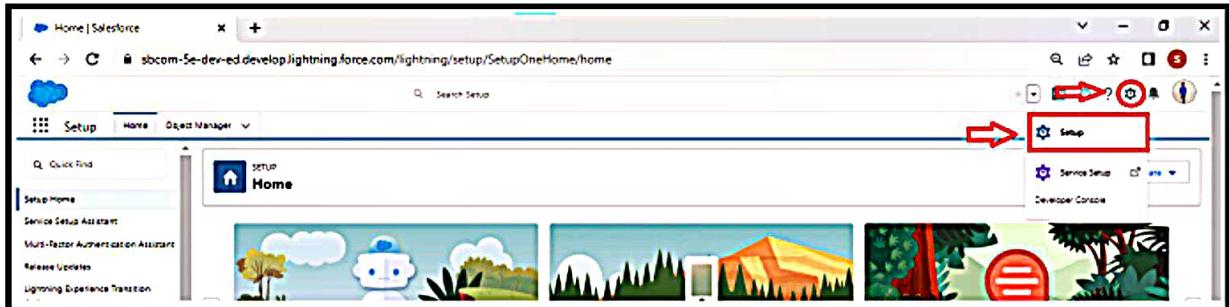
- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

## Activity1:

### Objects-

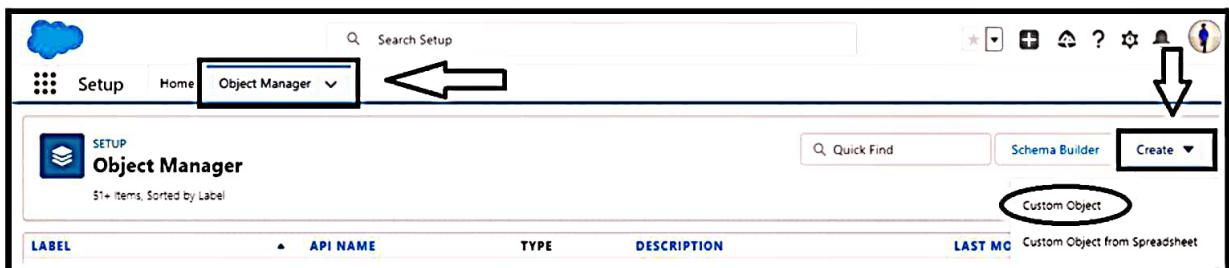
#### To Navigate to Setup page:

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

The screenshot shows the 'New Custom Object' setup page. The 'Custom Object Information' section includes fields for 'Label' (Example: Account) and 'Plural Label' (Example: Accounts). Below that is 'Object Name' (Example: Account) and 'Description'. Under 'Optional Features', 'Allow Reports' is checked, and 'Allow Search' is also checked. Red arrows point to each of these checked boxes.

This screenshot shows the 'Optional Features' section of the setup page. It includes checkboxes for 'Allow Reports' (checked), 'Allow Activites', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. Below this is the 'Object Classification' section with checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section has 'In Development' selected. The 'Search Status' section has 'Allow Search' checked. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'. A red arrow points to the 'Save' button.

## **Activity2:**

### **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**

## **Activity3:**

### **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**

## **Activity3:**

### **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**

## **Milestone 3:Tab**

### **What is Tab?**

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

### **Types of Tab**

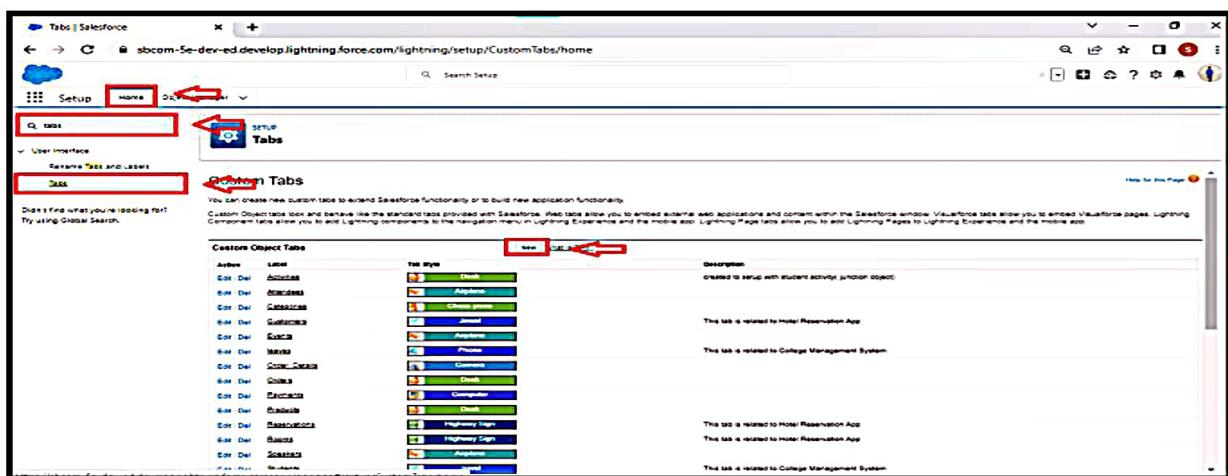
- Custom object tab
- Web tab
- Visualforce tab

### **Activity 1:**

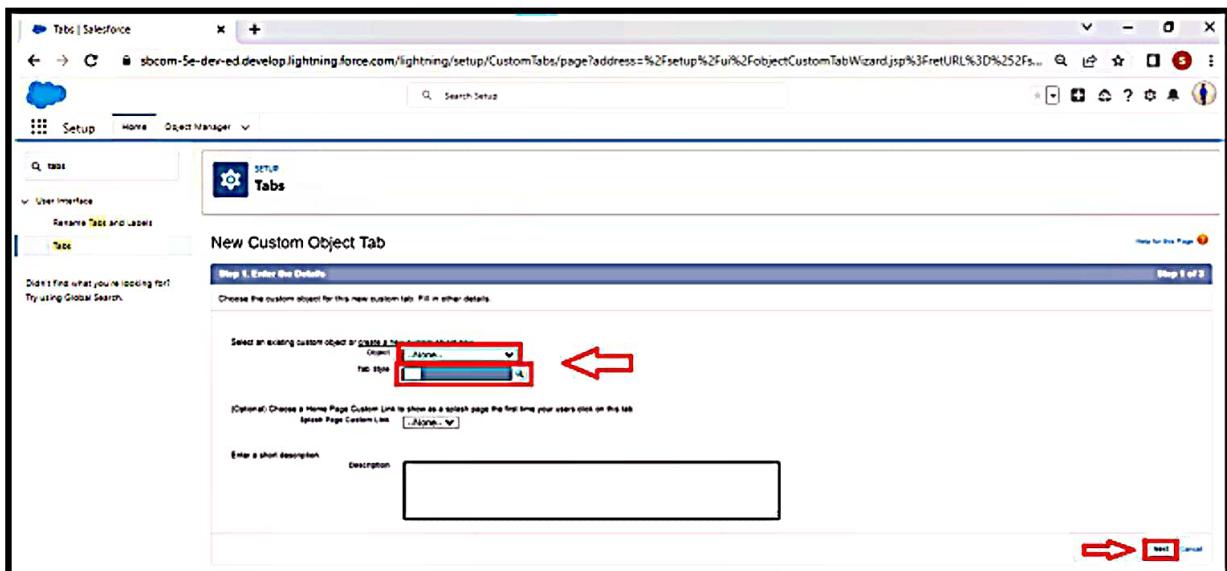
#### **Create the Lightning Tab**

##### **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.



## Activity 2:

### To create a Tab:(Buy)

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.

## Activity 3:

### 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

## Activity4:

### 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

## Milestone 4- The Lightning App:

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

## Activity1:

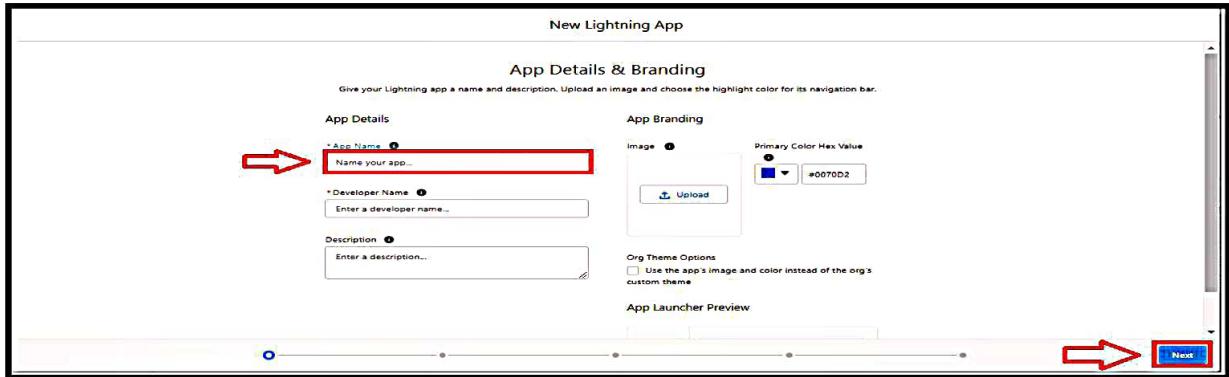
### Create the Lightning App

1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.

The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'App manager' and a 'Cloud (Appx Beta)' button highlighted with a red arrow. Below the search bar, there's a 'New Lightning App' button. The main area displays a table of existing apps, with the first few rows listed below:

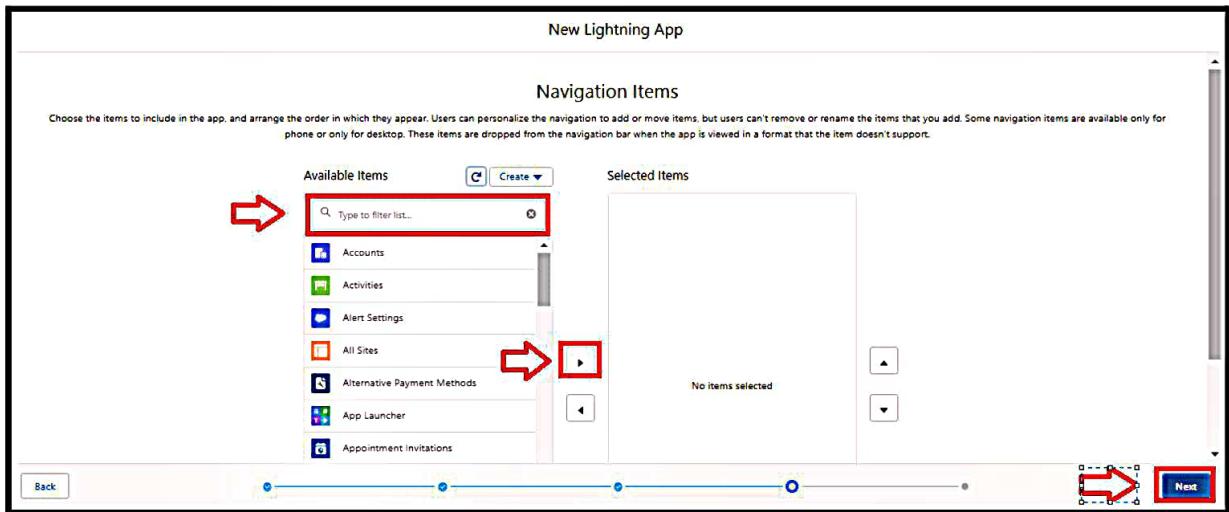
App Name	Developer Name	Description	Last Modified	App Type	VL
1. All Tabs	Artisan	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
2. Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
3. App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	✓
4. B2B Solutions	LightningB2B	Discover and manage business solutions designed for your industry	04/12/2022, 10:13 am	Lightning	✓
5. Charter Desktop	Charter/Desktop	Charter Desktop is an Adobe AIR-based desktop application that lets Charter users stay connected...	20/12/2022, 4:04 pm	Connected (Managed)	
6. Charter Mobile for BlackBerry	CharterForBlackBerry	The Salesforce.com Charter Mobile app lets you access Charter data on the go. Use it to view fe...	20/12/2022, 4:05 pm	Connected (Managed)	
7. College Management System	Naheed	Demo app	08/12/2022, 4:19 pm	Lightning	✓
8. Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	✓
9. Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	✓
10. Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning	✓

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.



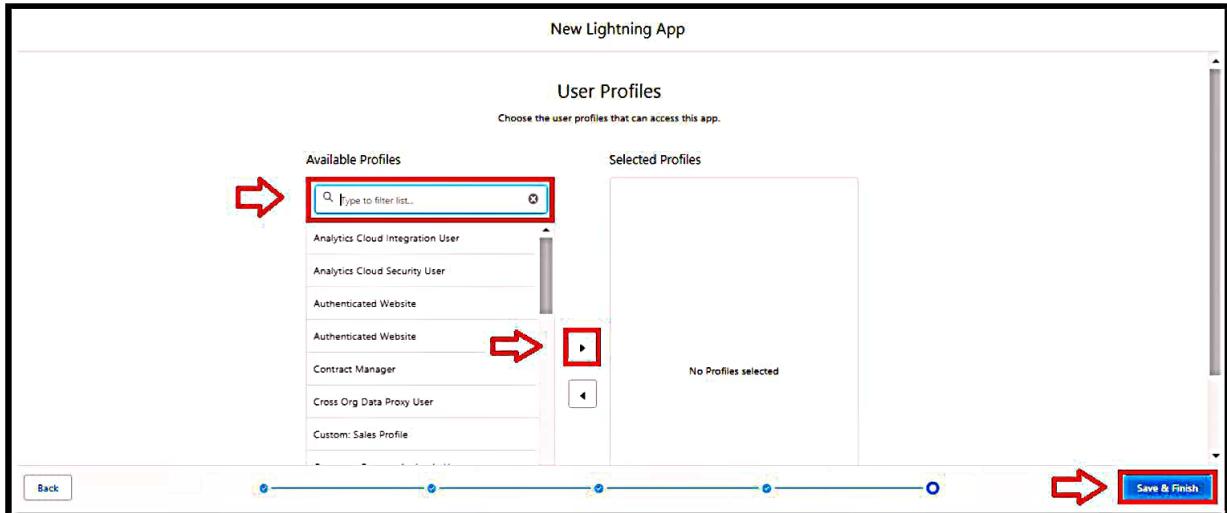
#### 4. To Add Navigation Items:

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.



## Milestone5-Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

### Types of Fields

- Standard Fields
- Custom Fields

### Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified

- Field Made During object Creation

### Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

### Activity 1:

#### Create the Lead Field

1. Go to setup → click on Object Manager → type object name in search bar → click on the object

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager. The 'Object Manager' tab is highlighted with a red box and has a red arrow pointing to it. Below the tabs, there is a search bar with the word 'Student' typed into it, also highlighted with a red box and a red arrow. The main area displays a table of objects. The first row, labeled 'Student', has its API name 'Lead' highlighted with a red box and a red arrow. The table includes columns for Label, API Name, Type, Description, Last Modified, and Deployed. There are two entries: 'Student' (Custom Object, College Management System) and 'Student\_Activity\_C' (Custom Object, created for the purpose of junction object).

2. Now click on “Fields & Relationships” → New.

The screenshot shows the 'New Custom Field' creation wizard, Step 2 of 4. On the left, there is a sidebar with various options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Student New Custom Field'. It has several input fields: 'Field Label' (highlighted with a red box and a red arrow), 'Field Name' (highlighted with a red box and a red arrow), 'Description', and 'Help Text'. Below these, there are sections for 'Required' (checkboxes for 'Always require a value in this field in order to save a record' and 'Add this field to existing custom report types that contain this entry'), and 'Default Value' (a dropdown menu). At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons, with the 'Next' button highlighted with a red box and a red arrow.

Fields & Relationships					
	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Ad No.	Name	Auto Number			
Age	Age__c	Number(2,0)			
Created By	CreatedById	Lookup(User)			
Date of Birth	Date_of_Birth__c	Date			
Date of Joining	Date_of_Joining__c	Date/Time			
Gender	Gender__c	Picklist			
Last Modified By	LastModifiedById	Lookup(User)			
Name	Name__c	Text(20)			
Owner	Owner	Lookup(User Group)			
Phone No.	phone_no__c	Phone			
Record Type	RecordTypeId	Record Type			
Team	teamer_x	Lookup			

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)

In the Fields and Relationship go to the Field Dependencies

Fields & Relationships					
13 Items, Sorted by Field Label					
<input type="text"/> Quick Find <span style="float: right;">New</span> <span style="float: right;">Deleted Fields</span> <span style="float: right;">Field Dependencies</span> <span style="float: right;">Set History Tracking</span>					

Click button to include or exclude selected values from the dependent picklist:				
	Maharashtra	Telangana	Gujrat	Tamil Nadu
State:	Mumbai	Mumbai	Mumbai	Mumbai
City:	Pune	Pune	Pune	Pune
	Nasik	Nasik	Nasik	Nasik
	Hyderabad	Hyderabad	Hyderabad	Hyderabad
	Surat	Surat	Surat	Surat
	Ahemdabad	Ahemdabad	Ahemdabad	Ahemdabad

Showing Columns: 1 - 4 (of 4) < Previous | Next > [View All](#) ▶ [Go to](#)

Click button to include or exclude selected values from the dependent picklist:				
	Maharashtra	Telangana	Gujrat	Tamil Nadu
State:	Mumbai	Mumbai	Mumbai	Mumbai
City:	Pune	Pune	Pune	Pune
	Nasik	Nasik	Nasik	Nasik
	Hyderabad	Hyderabad	Hyderabad	Hyderabad
	Surat	Surat	Surat	Surat
	Ahemdabad	Ahemdabad	Ahemdabad	Ahemdabad

Showing Columns: 1 - 4 (of 4) < Previous | Next > [View All](#)

Click button to include or exclude selected values from the dependent picklist:				
	Maharashtra	Telangana	Gujrat	Tamil Nadu
State:	Mumbai	Mumbai	Mumbai	Mumbai
City:	Pune	Pune	Pune	Pune
	Nasik	Nasik	Nasik	Nasik
	Hyderabad	Hyderabad	Hyderabad	Hyderabad
	Surat	Surat	Surat	Surat
	Ahemdabad	Ahemdabad	Ahemdabad	Ahemdabad

Showing Columns: 1 - 4 (of 4) < Previous | Next > [View All](#)

## Activity2: For Object Buy

- Create Field for Buy**
- Create Property Type:** (Picklist) (Residential, Commercial, Industrial)
- Discount:**(Percentage As the Field Data Type)
- State:**Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
- City:**(Take Any City for Field Dependency)
- Annual Amount To Be Paid**

## Activity3:

### Create Field for Rent

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

## Activity4:

### Create Field for Loan

- Loan Id:** Auto generated Field Take it as Autonumber LN-{0000}
- Interest Rate:** (Select the Field Data Type As Currency)
- Term:**(Select the Field Data type as Number)
- Annual Loan** Field create the Number as the field data type
- Total Loan Instalments:**( Field create the Number as the field data type)
- Loan Repayment**( Field create the Number as the field data type)
- Loan Amoun**( Select the Field data type as Formula)

<input type="checkbox"/> Action	Profile Name ↑	User License
<input type="checkbox"/> Edit   Clone	<u>Silver Partner User</u>	Silver Partner
<input type="checkbox"/> Edit   Clone	<u>Solution Manager</u>	Salesforce
<input type="checkbox"/> Edit   Clone	<u>Standard Platform User</u>	Salesforce Platform
<input type="checkbox"/> Edit   Clone	<u>Standard User</u>	Salesforce
<input type="checkbox"/> Edit   Clone	<u>System Administrator</u>	Salesforce

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))<sup>n</sup> Term\_\_c) -1))/((Interest\_rate\_\_c /52)\*((1+( Interest\_rate\_\_c /52))<sup>n</sup> Term\_\_c))
- ##Check the syntax below whether the formula syntax is correct or not

Simple Formula
Advanced Formula
Insert Field
Insert Operator ▾

```
Loan Amount (Currency)=
(Loan_Repayment__c * (((1+( Interest_rate__c /52))n Term__c) -1))/(( Interest_rate__c /52)*((1+( Interest_rate__c /52))n Term__c))
```

No syntax errors in merge fields or functions. (Compiled size: 274 characters)

## **Milestone 6: Profile**

- A profile is a group/collection of settings and permissions that define what a user can do in salesforce.
- profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.
- You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

### **Types of profiles in salesforce**

#### **Standard profiles:**

- By default salesforce provide below standard profiles.
- We cannot deleted standard ones
- .Each of these standard one includes a default set of permissions for all of the standard objects available on the platform.

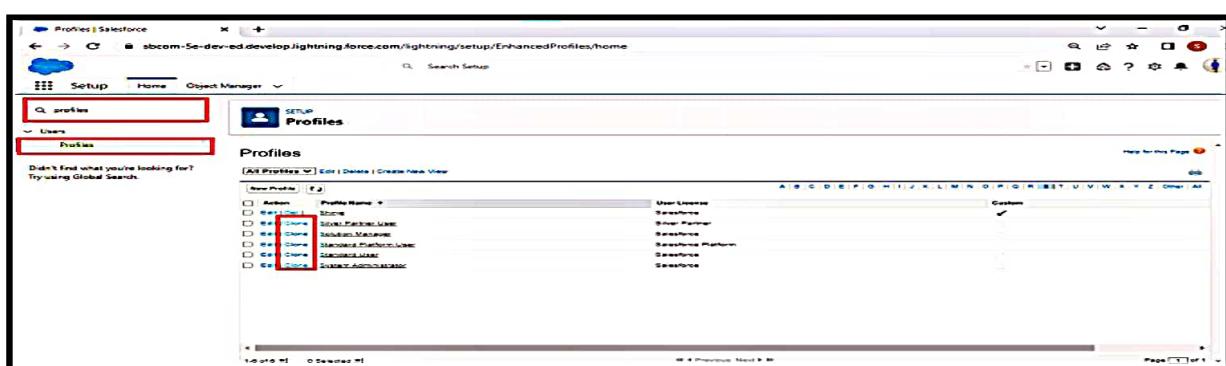
#### **2. Custom Profiles:**

- Custom ones defined by us.
- They can be deleted if there are no users assigned with that particular one.

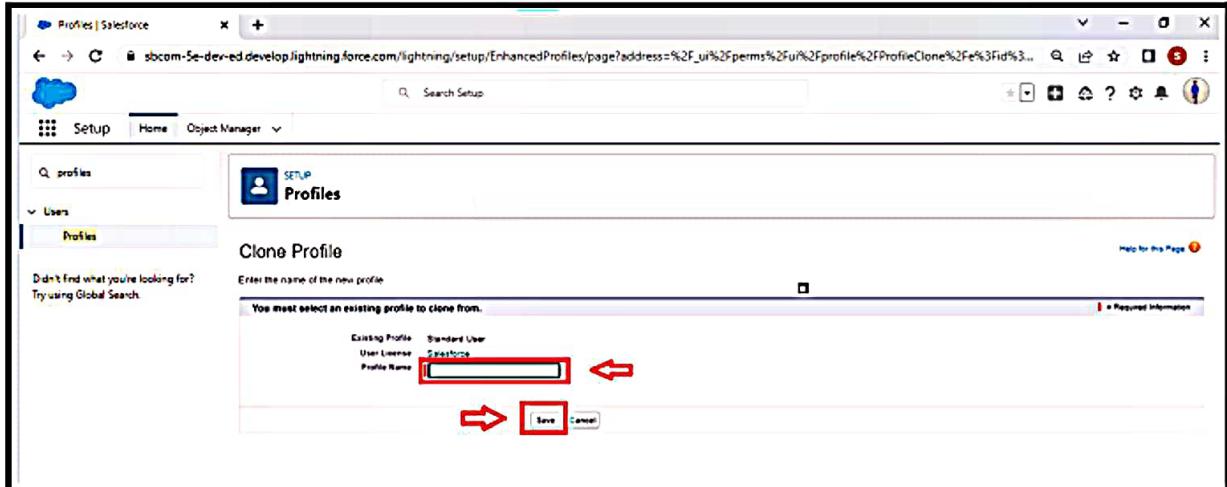
#### **Activity 1:**

##### **To create a new profile:**

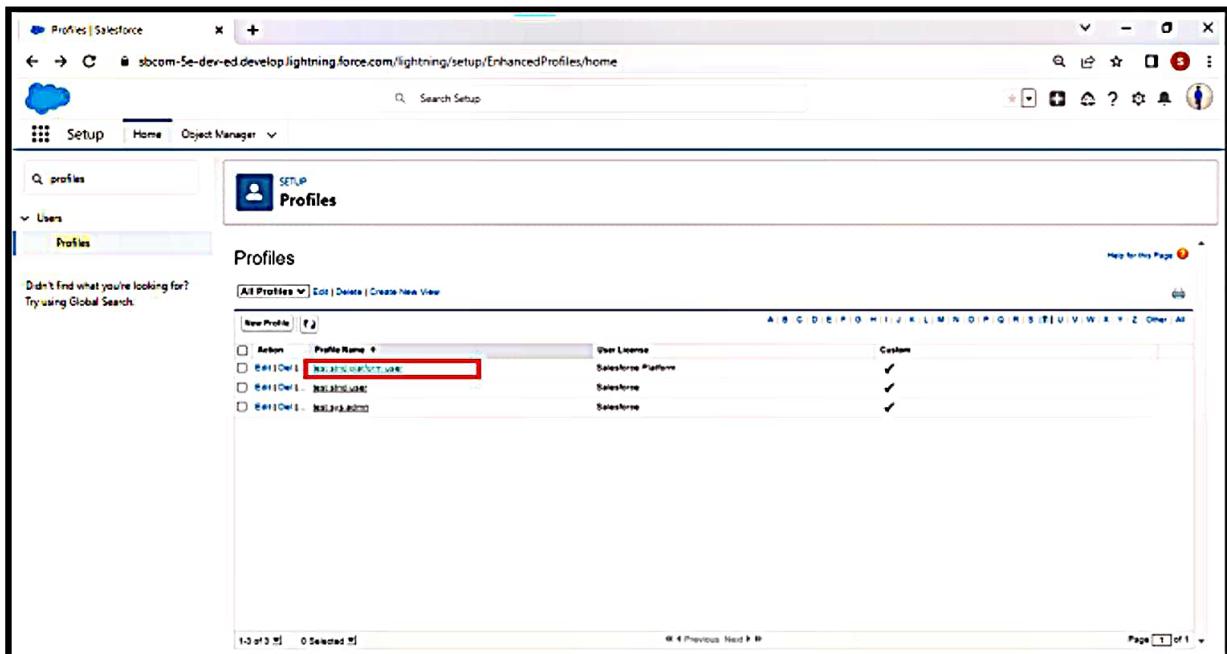
1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (standard user is preferable) → enter profile name → save



## 2. Enter a Profile Name



## 3. Click on the new created profile



4. While still on the profile page, then click Edit.

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. A specific profile named 'test stdnd user' is selected. The 'Profile Detail' section displays basic information: Name (test stdnd user), User License (Salesforce), Description (None), Created By (Mona Nasreen), and Modified By (Mona Nasreen). The 'Page Layouts' section lists various standard object layouts assigned to this profile. At the bottom right of the profile detail area, there is a red arrow pointing towards the 'Edit' button, which is highlighted in red. Other buttons include 'Close', 'Delete', and 'View users'.

5. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile

The screenshot shows the 'Custom Object Permissions' section within the 'Profiles' setup page. This section allows administrators to grant specific permissions (Read, Create, Edit, Delete, View All, Modify All) to various custom objects for the selected profile. A large red box highlights the 'Custom Object Permissions' header, and a red arrow points to the 'View All' checkboxes for the 'Categories' and 'Products' objects, indicating they are being selected. Other objects listed include Activities, Attendees, Tasks, Events, Invites, Orders, Order Details, Payments, Reservations, Roles, Rooms, Schedules, Speaker Status, Speakers, Staffs, Students, Student Activities, Suppliers, Mothers, Volunteers, Volunteer Activities, Volunteer Jobs, Volunteer Shifts, and Volunteer Shift Workers.

6. Sales Manager → Standard user Profile , Marketing Executive1 and Executive2→Standard Platform User,Marketing Manager→Standard Platform User For

## **Activity 2:**

### **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

### **Activity3-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.

## **Milestone7-New User**

- A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.
- Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

## Activity 1:

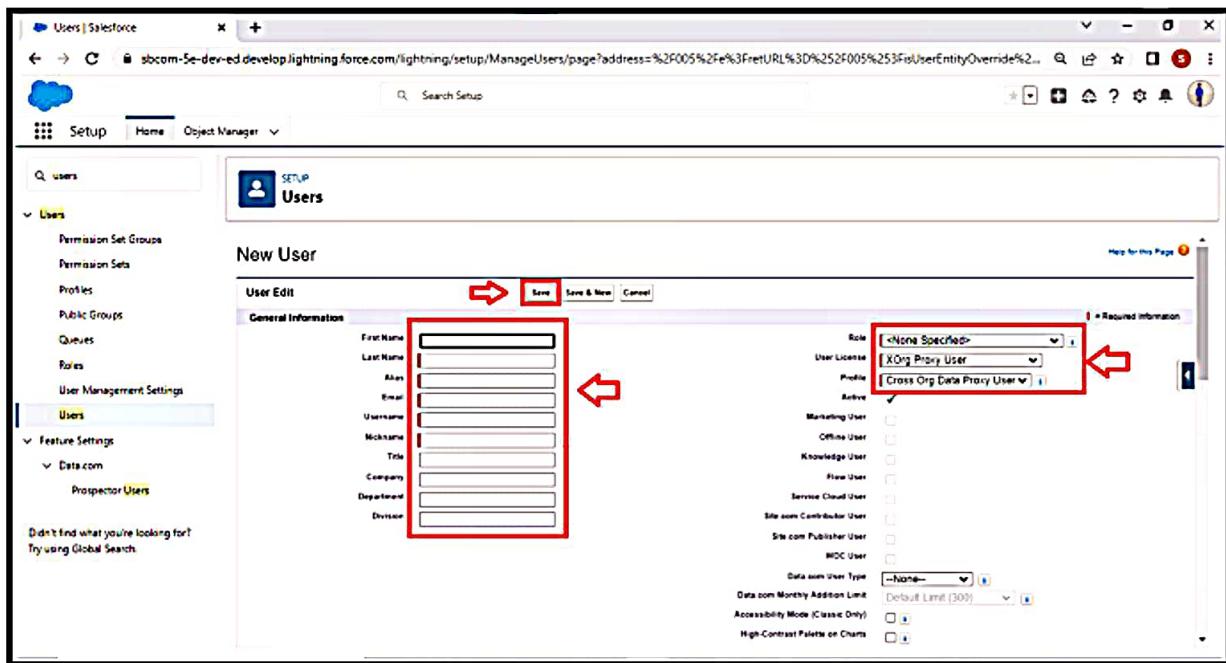
### Create User

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

The screenshot shows the Salesforce Setup interface with the following details:

- Search Bar:** A red box highlights the search bar at the top left with the text "Q users".
- User List Table:** A red box highlights the "New User" button at the top center of the user list table. The table has columns: Action, Full Name, Alias, Username, Role, Active, and Profile. It lists various users with their details and roles like Standard User, System Administrator, etc.
- Sidebar:** A red box highlights the "User Management Settings" sidebar on the left, which includes sections for Permission Set Groups, Profiles, Public Groups, Queues, Roles, and User Management Settings. Under User Management Settings, the "Users" section is selected.

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



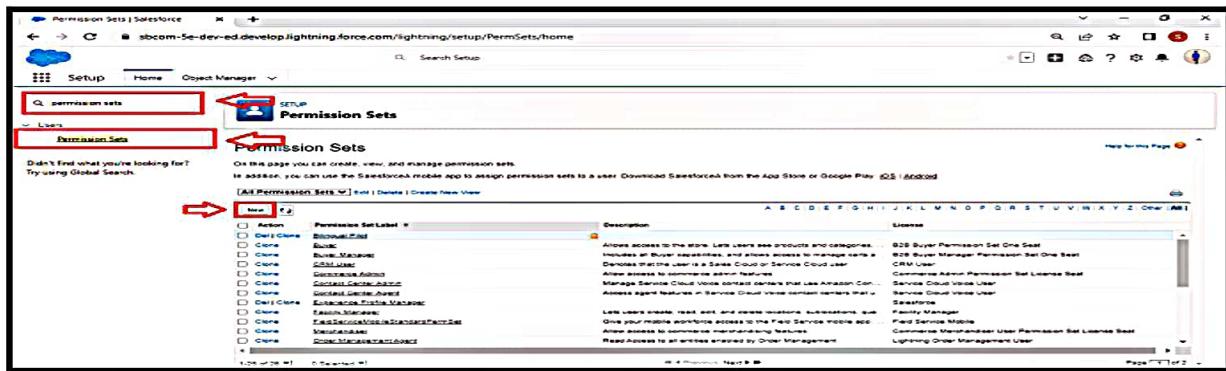
## Milestone8-Permission Set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

## Activity 1:

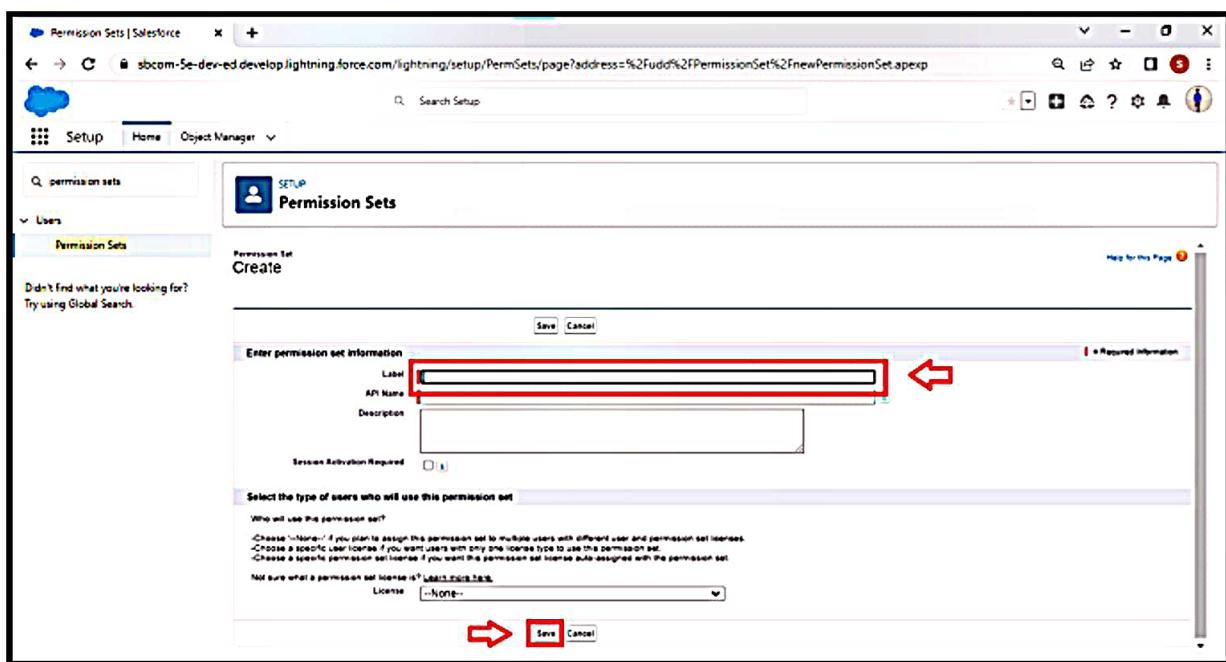
### Create the Permission Sets

1. Go to setup → type “permission sets” in quick search → select permission sets → New.



The screenshot shows the Salesforce Setup interface. At the top left, there is a search bar with the text "permission sets". Below it, under the "Users" navigation menu, there is a link labeled "Permission Sets". At the top center of the main content area, there is a "New" button with a red arrow pointing to it. The main area displays a list of permission sets, each with a checkbox, a label, a description, and a "License" column. The list includes various standard and custom permission sets like "Basic", "CRM User", "Commerce Admin", etc.

2. Enter the label name → save.



The screenshot shows the "Create" dialog for a new permission set. At the top right of the dialog, there are "Save" and "Cancel" buttons, both highlighted with red arrows. In the center of the dialog, there is an "Enter permission set information" section. It contains fields for "Label" (which is currently empty), "API Name", and "Description". Below these fields is a "Session Activation Required" checkbox. Further down, there is a section titled "Select the type of users who will use this permission set" with a note about license assignment. At the very bottom of the dialog, there is a "License" dropdown menu with the value "-none-".

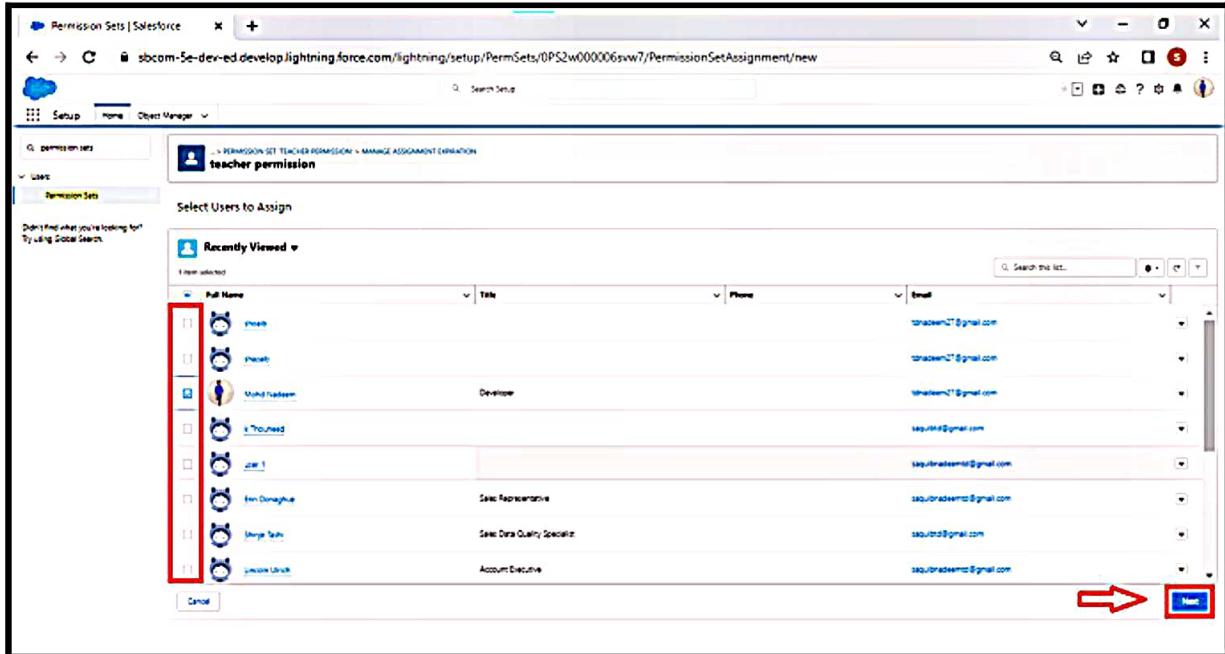
3. After saving the permission click on the Manage assignment

The screenshot shows the Salesforce 'Permission Sets' page. In the center, there is a card for a permission set named 'teacher permission'. At the top of this card, there are several buttons: 'Clone', 'Delete', 'Edit Properties', and a red-bordered 'Manage Assignments' button. Below these buttons, there is a 'Permission Set Overview' section with fields for 'Description', 'License', 'Session Activation Required', and 'Last Modified By'. To the right of this overview, it shows 'API Name: teacher\_permission', 'Namespace Prefix: ', and 'Created By: Manu Nadeem - 23/01/2023, 2:20 pm'. Below the overview, there is a 'Apps' section with various settings like 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'App Class Access', 'Visualforce Page Access', and 'External Data Source Access'. A red arrow points to the 'Manage Assignments' button.

4. Now click on the Add Assignment

The screenshot shows the 'Current Assignments' page for the 'teacher permission' permission set. At the top, there is a breadcrumb trail: 'Setup > Permission Set Teacher Permission > teacher permission'. Below this, there is a 'Current Assignments' section with a red-bordered 'Add Assignment' button in the top right. The main area features a cartoon illustration of a cactus in a desert landscape with a sun and clouds. Below the illustration, the text 'No assignments defined.' is displayed. A red arrow points to the 'Add Assignment' button.

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

### **Milestone 9: Setup For OWD**

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

- Public Read/Write/Transfer (only available of Leads and Cases)
- Public Read/Write
- Public Read/Only
- Private

## Activity1:

### 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

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The 'Manage sharing settings for:' dropdown is set to 'All Objects'. The 'Default Sharing Settings' table lists various objects with their internal and external access levels and hierarchy grants. The 'Grant Access Using Hierarchies' column contains checkmarks for most objects except 'Lead' and 'Rent', which have a small checkmark icon.

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	✓

5. Click Edit and from the Drop Down select private for internal and external

The screenshot shows the 'Edit Work Type Group' page. It displays access levels for 'Lead' and 'Rent' objects. Under 'Work Type Group', 'Lead' has 'Public Read/Write' for internal and 'Private' for external. Under 'Other Settings', 'Standard Report Visibility' is checked and 'Manual User Record Sharing' is unchecked. At the bottom are 'Save' and 'Cancel' buttons.

Work Type Group	Internal Access	External Access	Grant Access Using Hierarchies
Lead	Public Read/Write	Private	<input checked="" type="checkbox"/>
Rent	Private	Private	<input checked="" type="checkbox"/>
	Private	Private	<input checked="" type="checkbox"/>

**Other Settings**

Standard Report Visibility

Manual User Record Sharing  Manage

**Buttons:** Save Cancel

6. This Setting is for all the User Which have been Created

## **Activity 2:**

### **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

## **Milestone10-Report**

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

Tabular

Summary

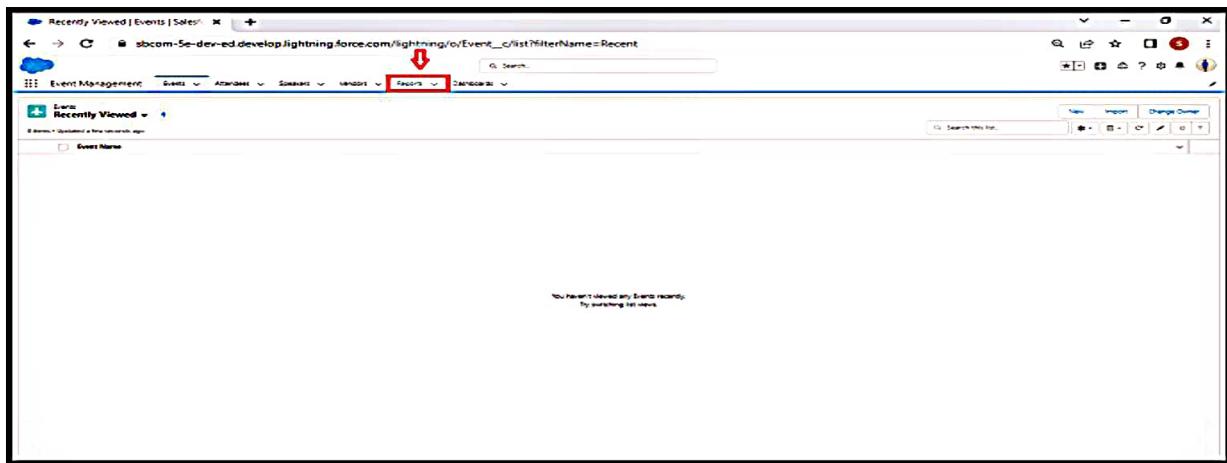
Matrix

Joined Reports

## **Activity 1:**

### **Create Report-**

1. Go to the app → click on the reports tab



## 2. Click New Report

The screenshot shows the Salesforce Reports interface. At the top, there's a search bar and a toolbar with various icons. Below the toolbar, a navigation bar includes links for Event Management, Guests, Attendees, Speakers, Vendors, Reports, and Dashboards. The main area displays a table of recent reports. The table has columns for Report Name, Description, Folder, Created By, and Created On. A red arrow points to the 'New Report' button located in the top right corner of the table header.

## 3. Select report type from category or from report type panel or from search panel → click on start report.

The screenshot shows the 'Create Report' dialog box. On the left, there's a sidebar titled 'Category' with a list of report types. The 'Recently Used' section is expanded, showing 'All', 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', 'Contracts and Orders', 'Price Books, Products and Assets', 'Administrative Reports', 'File and Content Reports', 'Individuals', 'Other Reports', and 'Hidden Report Types'. The entire sidebar is highlighted with a red box. In the center, there's a 'Select a Report Type' panel with a search bar and a table of report types categorized by name and category. The entire central panel is highlighted with a red box. On the right, there's a 'Details' panel for 'Accounts' with sections for 'Created By You', 'Created By Others', 'Objects Used in Report Type', and a 'Start Report' button. The 'Start Report' button is highlighted with a blue box.

4. Customize your report, then save or run it.

The screenshot shows the Report Builder interface in Salesforce. The main area displays a table of account records with columns: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. The table contains 8 rows of account data. On the left, there are filter and group-by options. At the top right, there are buttons for 'Get Feedback!', 'Run', 'Save & Run' (which is highlighted with a red box and a red arrow pointing to it), 'Close', and 'Delete'. A status bar at the bottom right says 'Update Private Automatically'.

Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	Multil Account	Unilever Oil & Gas, Singapore	Customer - Direct	Medium	18/01/2023	
2	Multil Account	Unilever Oil & Gas, UK	Customer - Direct	Medium	18/01/2023	
3	Multil Account	University of Arizona	Customer - Direct	Warm	18/01/2023	
4	Multil Account	Whirlpool Value Household	Residential	Hot	18/01/2023	
5	Multil Account	Whirlpool Value Household	Residential	Hot	18/01/2023	
6	Multil Account	Whirlpool Value Household	Residential	Warm	18/01/2023	
7	Multil Account	globe Networks	Installation Partner	Cold	18/01/2023	
8	Multil Account	Pat Health Household	Residential	Cold	18/01/2023	

### 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\$

### Milestone11-Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

## Activity1:

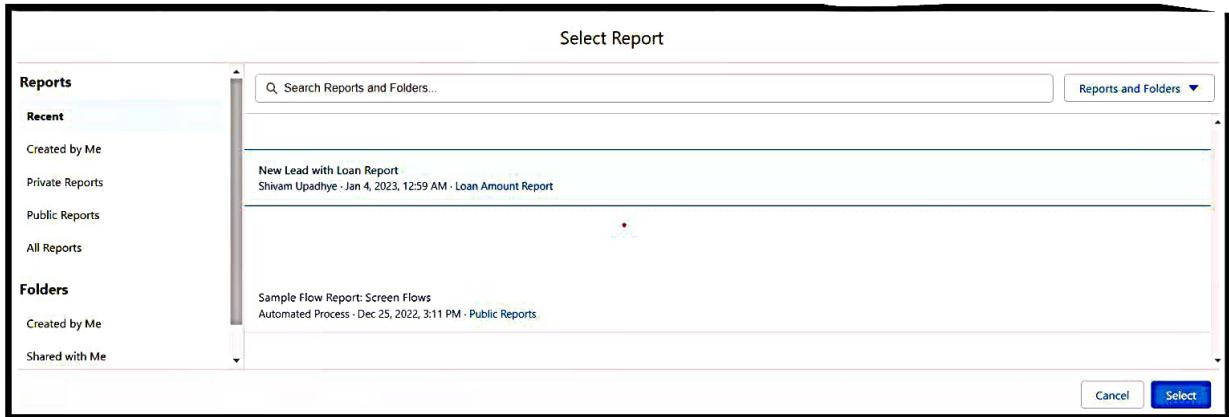
### Create dashboards

1. Go to the App Launcher and select the Dashboards
2. Select add component

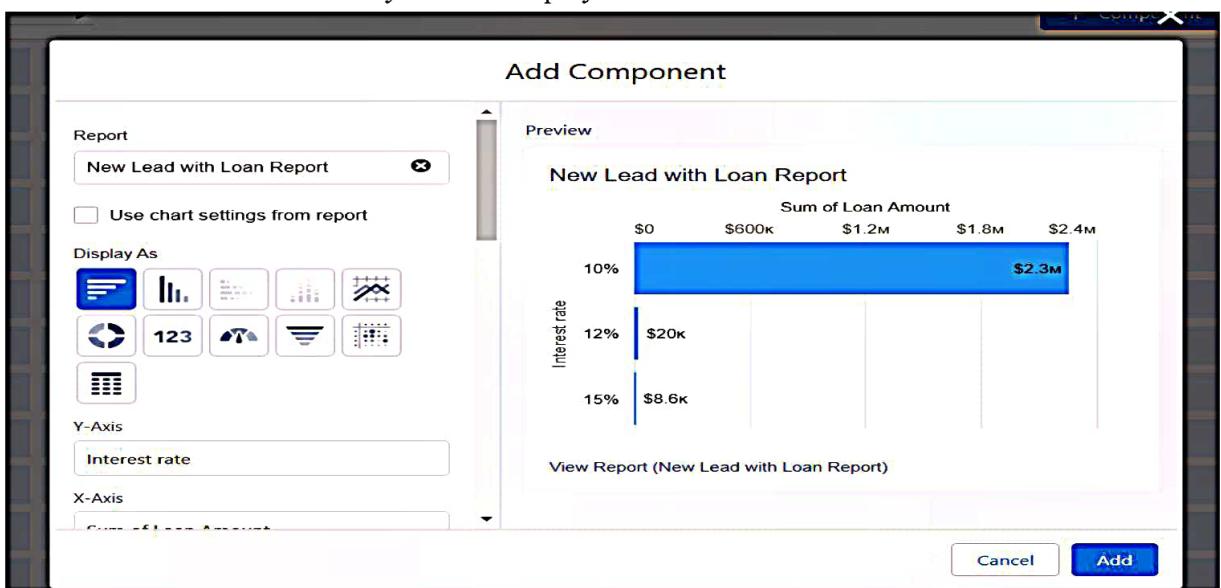
The screenshot shows the Salesforce App Launcher interface. The top navigation bar includes Home, Lead, Buyers, Mortgages, Rents, Loan, and Dashboards. A search bar at the top right contains the placeholder "Search...". On the left, there's a sidebar with a search field containing "das", followed by sections for Apps (No results), Items (Dashboards selected), and a "View All" link. Below these are links for Private Dashboards and All Dashboards. A "FOLDERS" section is also present. The main content area displays a table with columns for Description, Folder, and Created By. One row is visible: "Loan Amount" under "Description", "Shivam Upadhye" under "Created By", and "Loan Amount Transaction" under "Folder".

The screenshot shows a "New Dashboard" dialog box centered over a grid-based dashboard editor. The dialog has fields for Name (with a red error message "Name the dashboard."), Description, and Folder (set to "Loan Amount"). It includes "Cancel" and "Create" buttons at the bottom.

3. Select the folder select the following option new lead with loan Amount



4. Select in which format you want display chart





## Activity2:

### Create Dashboard

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