

## **PROPERTY MANAGEMENT APPLICATION USING SALESFORCE**

### **INTRODUCTION**

#### **1.1 Overview:**

#### **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.

#### **Property management:-**

When real estate is neglected it is susceptible to damage and loss. To maintain homes and businesses, owners of real estate hire property managers. In this lesson, we will explore the role of property managers in real estate.

Tenants and clients today are mobile, social, and connected, and they anticipate responsive 1:1 connections. Salesforce For Real Estate is intended for property managers, developers, and investors who look forward to automating their association with tenants and clients.

Salesforce Property Management, a cloud-based CRM tool helps varied real estate agents businesses in tracking different information about residential and commercial properties.

Salesforce Property Management has powerful tools to remain associated with clients and tenants continuously, support further connections, track key data about business and residential properties, including occupancy rates, essential tenants, and revenue and take your productivity, and business growth, to the next level.

Techila Global Services Is The Pioneer In Offering Salesforce For Real Estate, A Solution Tweaked For The GCC And Based On The World's #1 CRM Stage, Salesforce.com, Permitting Your Group To Associate With Their Clients In a Radically New Manner

## 1.2 Purpose

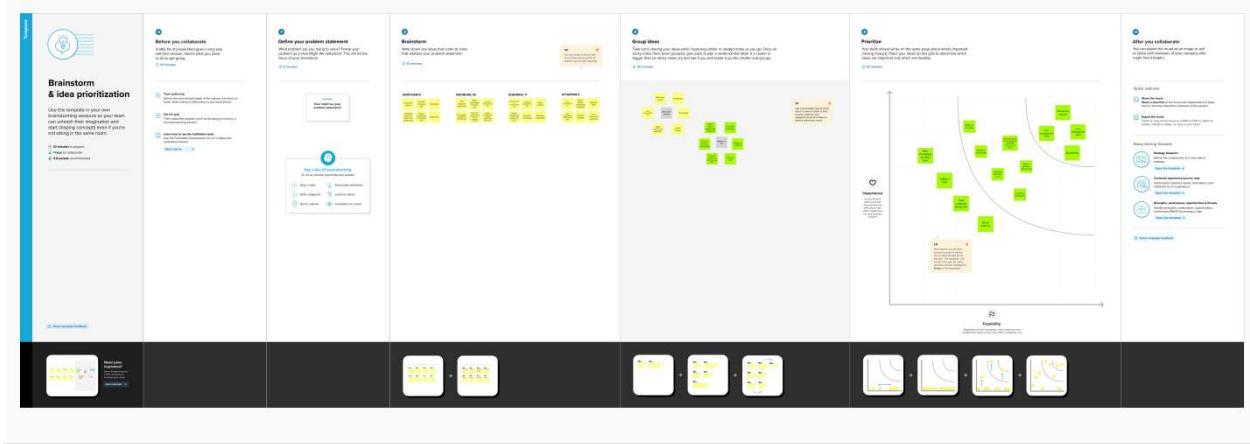
Property managers assist owners in creating budgets, advertise rental properties, qualify tenants, and collect rent. They also comply with the local landlord and real estate board laws and maintain the property.

## Problem Definition & Design Thinking:

### 2.1 Empathy map:



## 2.2 Ideation & Brainstorming Map



## RESULT

| OBJECT NAME | FIELD IN OBJECT |             |
|-------------|-----------------|-------------|
|             | FILED LABEL     | DATA TYPE   |
| Lead        | lead            | Auto number |
|             | State           | Picklist    |
|             | City            | Picklist    |
|             | Email           | Email       |
|             | Phone           | Phone       |
|             |                 |             |
| Buy         | FILED LABEL     | DATA TYPE   |
|             | Buy             | Auto number |
|             | Property type   | Picklist    |
|             | Discount        | PErcentage  |
|             | State           | Picklist    |
|             | City            | Picklist    |
| Rent        | FILED LABEL     | DATA TYPE   |
|             | Rent            | Auto number |
|             | Rental City     | Text        |
|             | BHK type        | Picklist    |
| Loan        | FILED LABEL     | DATA TYPE   |
|             | Loan Id         | Auto number |

|  |                       |          |
|--|-----------------------|----------|
|  | Interest Rate         | Currency |
|  | Term                  | Number   |
|  | Annual Loan           | Number   |
|  | Total Loan Intalments | Number   |
|  | Loan Reayment         | Number   |
|  | Loan amount           | Formula  |

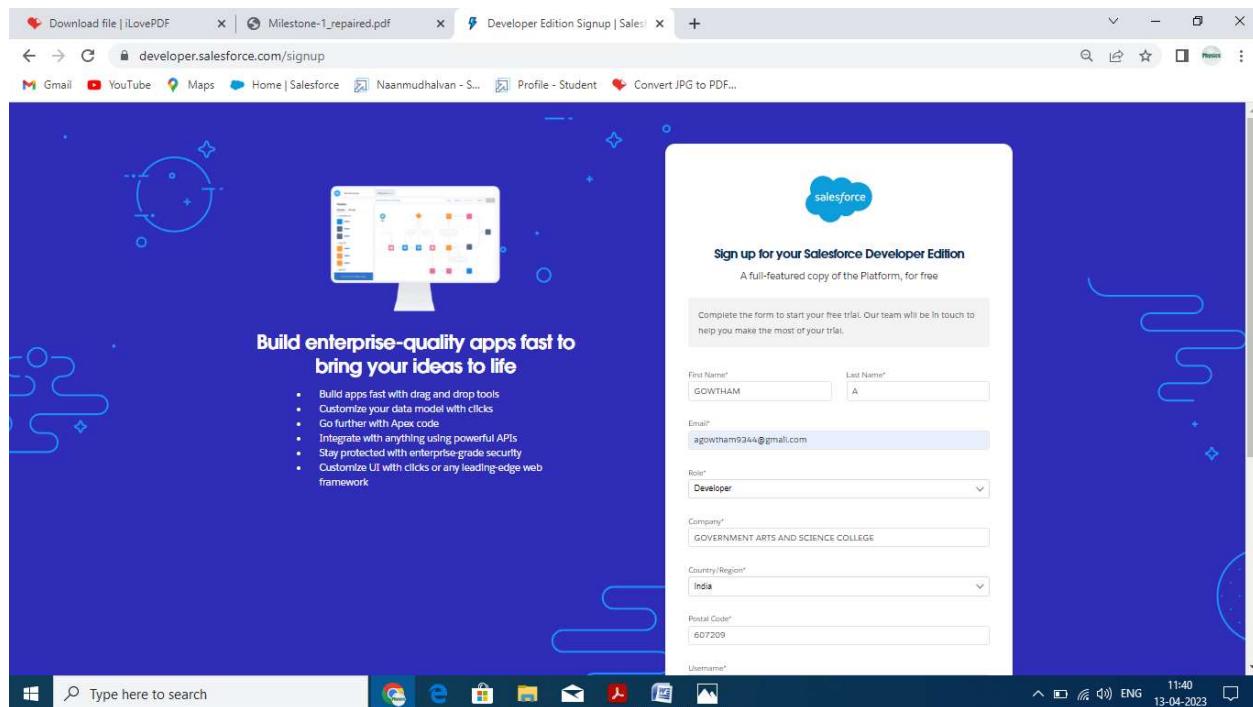
### 3.2 Activity & Screenshot

#### Milestone 1-Salesforce

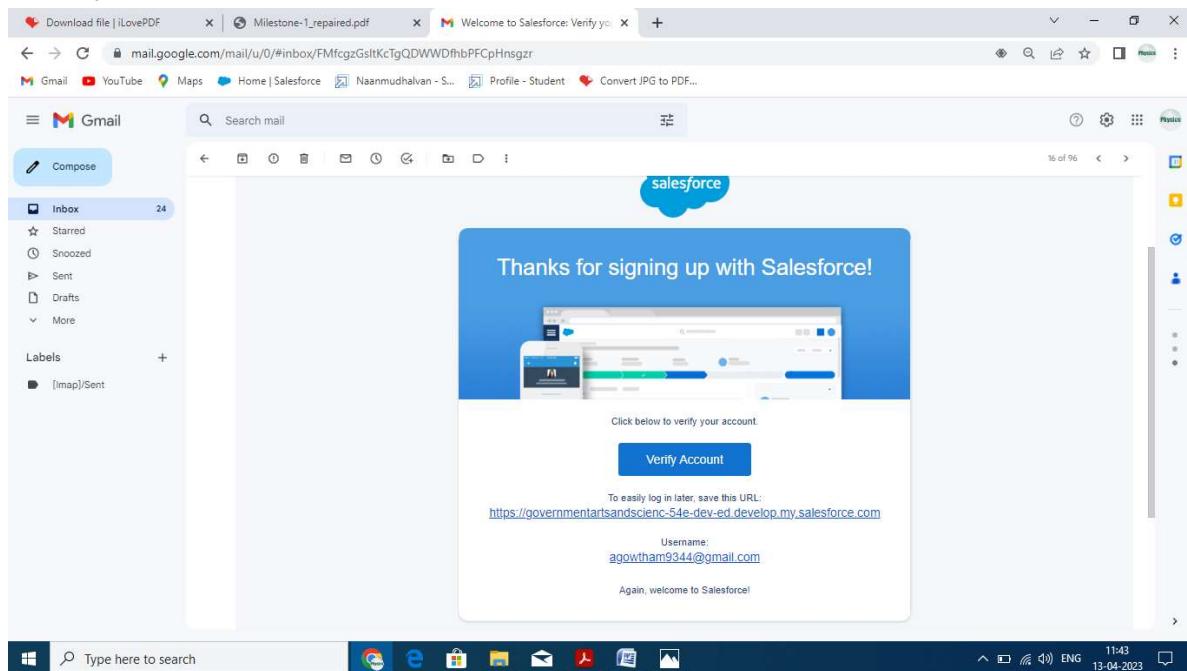
Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster.

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.

#### **Activity1:**



## Activity 2:



## Milestone 2- Object:

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

### 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:

The screenshot shows the Salesforce Setup Home page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area features three cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Below these cards is a section titled 'Most Recently Used' with a count of '10 items'. A sidebar on the left lists various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, and Salesforce Mobile App.

The screenshot shows the Salesforce Object Manager page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area displays a table of objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The table lists standard objects such as Account, Activity, Alternative Payment Method, API Anomaly Event Store, Appointment invitation, Appointment invitee, Appointment Topic Time Slot, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, Assigned Resource, and Associated Location. A context menu is open over the 'Associated Location' row, showing options like 'Custom Object' and 'Custom Object from Spreadsheet'. The bottom of the screen shows a Windows taskbar with various pinned icons.

| LABEL                       | API NAME                 | TYPE            | DESCRIPTION | LAST MODIFIED |
|-----------------------------|--------------------------|-----------------|-------------|---------------|
| Account                     | Account                  | Standard Object |             |               |
| Activity                    | Activity                 | Standard Object |             |               |
| Alternative Payment Method  | AlternativePaymentMethod | Standard Object |             |               |
| API Anomaly Event Store     | ApiAnomalyEventStore     | Standard Object |             |               |
| Appointment invitation      | Appointmentinvitation    | Standard Object |             |               |
| Appointment invitee         | Appointmentinvitee       | Standard Object |             |               |
| Appointment Topic Time Slot | AppointmentTopicTimeSlot | Standard Object |             |               |
| Asset                       | Asset                    | Standard Object |             |               |
| Asset Action                | AssetAction              | Standard Object |             |               |
| Asset Action Source         | AssetActionSource        | Standard Object |             |               |
| Asset Relationship          | AssetRelationship        | Standard Object |             |               |
| Asset State Period          | AssetStatePeriod         | Standard Object |             |               |
| Assigned Resource           | AssignedResource         | Standard Object |             |               |
| Associated Location         | AssociatedLocation       | Standard Object |             |               |

## Activity2:

The screenshot shows two instances of the Salesforce Setup interface, one above the other, illustrating the creation of a new custom object.

**Top Window (Custom Object Definition Edit):**

- Object Name:** Buyer (highlighted in red)
- Label:** Buyers
- Point Label:** Buyers
- Description:** (Empty text area)
- Content Name:** Buyer Name (highlighted in red)
- Date Type:** Text
- Optional Features:**  Allow Reports,  Allow Activities,  Track Field History,  Allow in Chatter Groups,  Delete, Locking
- Object Classification:**  Enterprise Application object,  Light Application object,  User object
- Deployment Status:**  In Development,  Deployed
- Search Status:**  Allow Search
- Object Creation Options (available only when custom object is first created):**
  - Add Notes and Attachments related list to default page layout
  - Launch New Custom-Tab Wizard after saving this custom object

**Bottom Window (New Custom Object):**

- Object Name:** Buyer (highlighted in red)
- Label:** Buyers
- Point Label:** Buyers
- Description:** (Empty text area)
- Content Name:** Buyer Name (highlighted in red)
- Date Type:** Text
- Optional Features:**  Allow Reports,  Allow Activities,  Track Field History,  Allow in Chatter Groups,  Delete, Locking
- Object Classification:**  Enterprise Application object,  Light Application object,  User object
- Deployment Status:**  In Development,  Deployed
- Search Status:**  Allow Search
- Object Creation Options (available only when custom object is first created):**
  - Add Notes and Attachments related list to default page layout
  - Launch New Custom-Tab Wizard after saving this custom object

The screenshot shows the Salesforce Setup interface with the title bar "Welcome to Salesforce: Verify yo" and "Buy | Salesforce". The URL is "governmentartsandscience-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cXFo/Details/view". The main content area is titled "SETUP - OBJECTMANAGER" and "Buy". On the left, there's a sidebar with a tree view of object settings: 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, Slicing Rules, Triggers, Flow Triggers, and Validation Rules. The right side shows the "Details" tab for the "Buy" object, with fields like API Name (Buyer\_\_c), Singular Label (Buy), Plural Label (Buyers), and various checkboxes for reports, activities, and history tracking.

### Activity3:

The screenshot shows the Salesforce Setup interface with the title bar "Welcome to Salesforce: Verify yo" and "New Custom Object | Salesforce". The URL is "governmentartsandscience-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/now". The main content area is titled "SETUP New Custom Object". A message at the top says "Permissions for this object are defined by all profiles by default. You can modify object permissions in permission sets or by editing current profiles." Below it, the "Custom Object Definition Edit" section shows the "Object Name" field set to "Buy" (highlighted in red). Other fields include "Label" (Buy), "Plural Label" (Buyers), and "Description" (empty). At the bottom, there are sections for "Enter Record Name Label and Format" (Record Name: "Buy", Data Type: "Text") and "Optional Features" (checkboxes for "Show Reports", "Show Activities", and "Track Field History").

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various configuration options for the 'Loan' object, including Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' tab is selected, displaying the following information:

|                      |                                     |
|----------------------|-------------------------------------|
| Description          |                                     |
| API Name             | Loans__c                            |
| Custom               | <input checked="" type="checkbox"/> |
| Singular Label       | Loan                                |
| Plural Label         | Loans                               |
| Enable Reports       | <input checked="" type="checkbox"/> |
| Track Activities     |                                     |
| Track Field History  |                                     |
| Deployment Status    | Deployed                            |
| Help Settings        |                                     |
| Standard Help Window | Standard salesforce.com Help Window |

At the top right of the main area are 'Edit' and 'Delete' buttons.

## Activity4:

The screenshot shows the 'New Custom Object' setup page. The 'Report Name' field is set to 'Loan'. Other settings include:

- Record Name:
- Optional Features:
  - Allow Reports:
  - Allow Search:
  - Track Field History:
  - Allow in Create Groups:
  - Data Licensing:
- Object Classification:  Allow this object to be used in an Enterprise Application.
- Deployment Status:  In Development.
- Search Status:  Allow users to search for this object type.
- Object Creation Options (available only when custom object is first created):
  - Add Notes and Attachments to Related List by Default:
  - LAUNCH New Custom Tab Wizard after saving this custom object:

At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'RENT | Salesforce'. The left sidebar lists various configuration options under '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, and Restriction Rules. The right panel displays the 'Details' section for the 'Rent' object, which includes fields like API Name (Rents\_\_c), Singular Label (Rent), Plural Label (Rents), and various checkboxes for Reports, Activities, Field History, and Deployment Status.

### **Milestone 3: 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:**

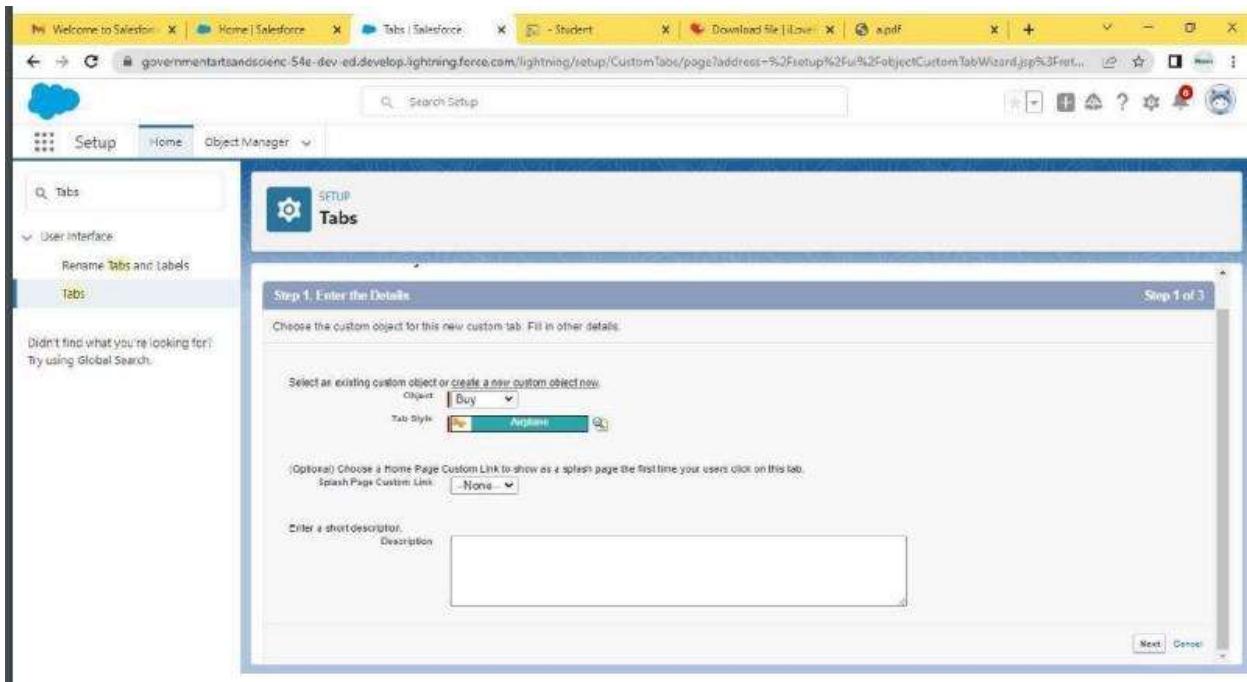
- Custom object tab
- Web tab
- Visual force tab

#### **Activity 1:**

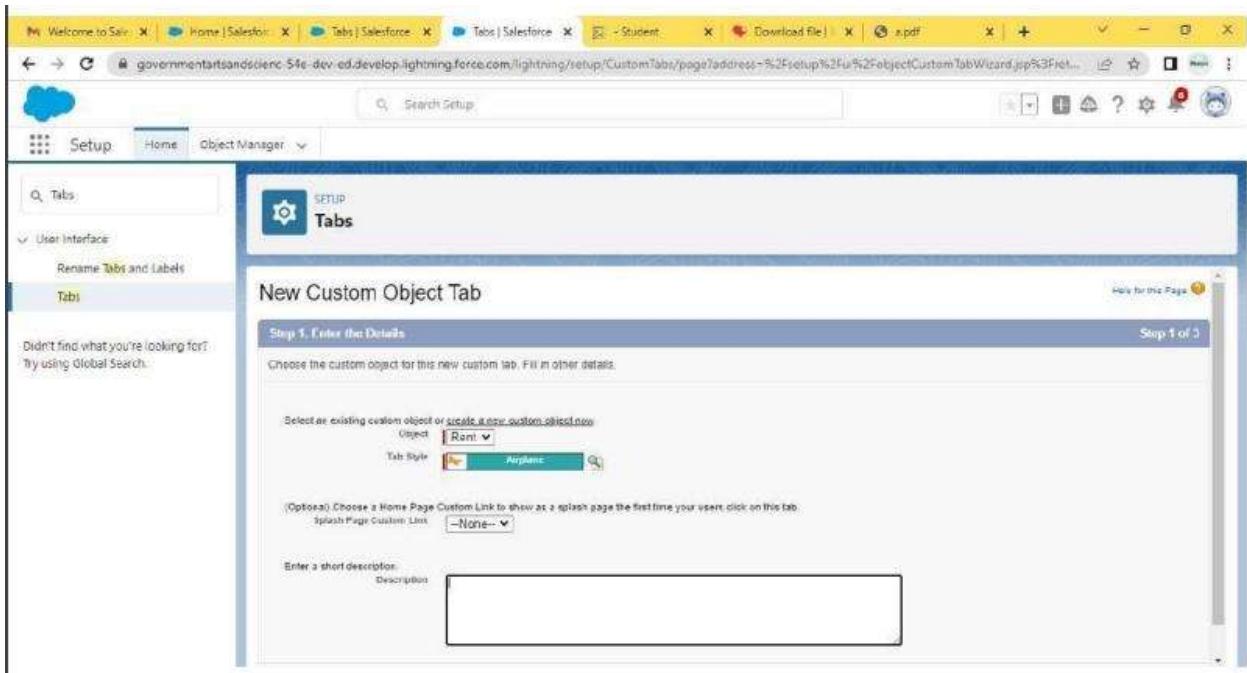
The screenshot shows the Salesforce Setup interface for managing tabs. The left sidebar has sections for Tabs, User Interface, Rename Tabs and Labels, and Tabs. The main content area is titled "Custom Tabs" under the "SETUP" tab. It explains that you can create new custom tabs to extend Salesforce functionality or build new application functionality. It lists four categories: "Custom Object Tabs" (No Custom Object Tabs have been defined), "Web Tabs" (No Web Tabs have been defined), "Visualforce Tabs" (No Visualforce Tabs have been defined), and "Lightning Component Tabs" (No Lightning Component Tabs have been defined). A "Help for this Page" link is at the top right.

The screenshot shows the "New Custom Object Tab" wizard, Step 1: Enter the Details. The left sidebar is identical to the previous screenshot. The main content area is titled "New Custom Object Tab" and "Step 1: Enter the Details". It says "Choose the custom object for this new custom tab. Fill in other details." There are two options: "Select an existing custom object or Create a new custom object now." The "Create a new custom object now" option is selected, with "Label" set to "Lead" and "Type" set to "Lead". Below this is an optional field: "(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab." The dropdown menu shows "(None)". At the bottom, there is a "Description" input field and a "Next Step" button.

## Activity 2:



## Activity 3:



## Activity 4:

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. A modal window titled 'New Custom Object Tab' is open, indicating 'Step 1 of 3'. The user is prompted to choose a custom object for the tab. The 'Object' dropdown is set to 'LOAN'. The 'Tab Style' dropdown is set to 'Replace'. Below these fields, there is an optional field for a 'Splash Page Custom Link' which is currently set to 'None'. There is also a 'Description' input field with a placeholder 'Enter a short descriptor.'.

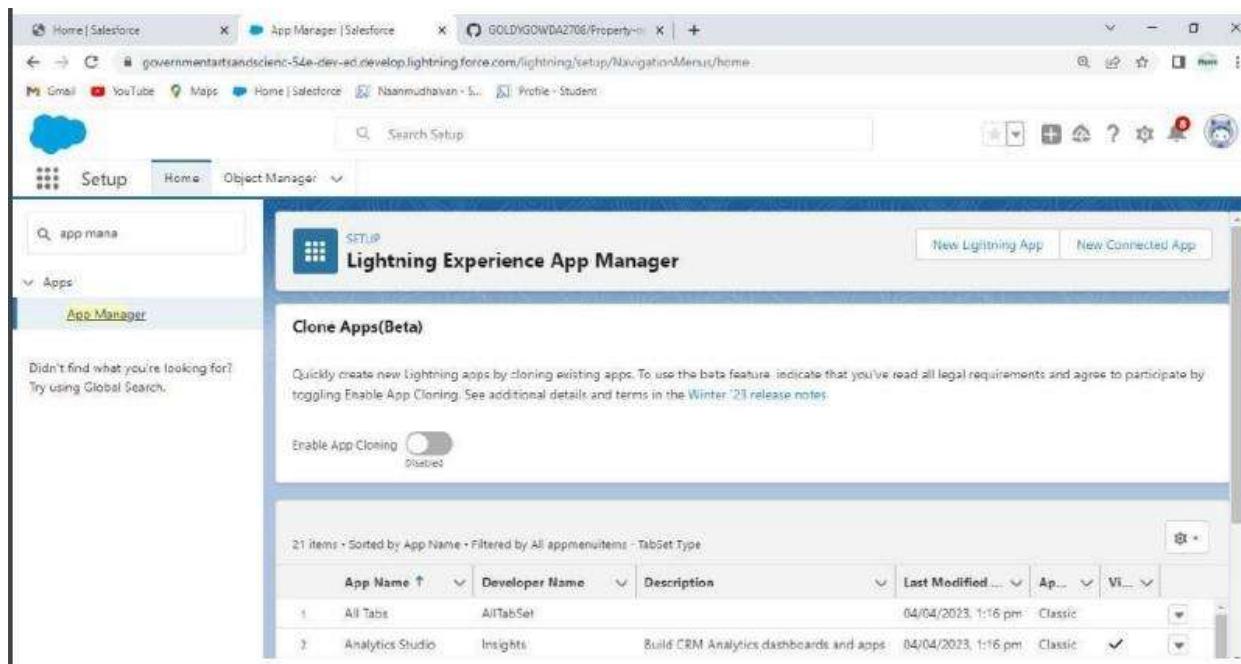
The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. A modal window titled 'Custom Tabs' is open. It provides an overview of different types of tabs: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Under 'Custom Object Tabs', there is a table listing four tabs: 'Edit Del - Birds', 'Edit Del - Loans', 'Edit Del - Users', and 'Edit Del - Banks'. Each row includes a 'Label' column, a 'Tab Style' column (with color-coded boxes), and a 'Description' column. The 'Tab Style' for all listed tabs is 'Replace'. The 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs' sections all indicate 'No [tab type] have been defined'.

| Action   | Label | Tab Style | Description |
|----------|-------|-----------|-------------|
| Edit Del | Birds | Replace   |             |
| Edit Del | Loans | Replace   |             |
| Edit Del | Users | Replace   |             |
| Edit Del | Banks | Replace   |             |

## **Milestone 4- The Lightning App:**

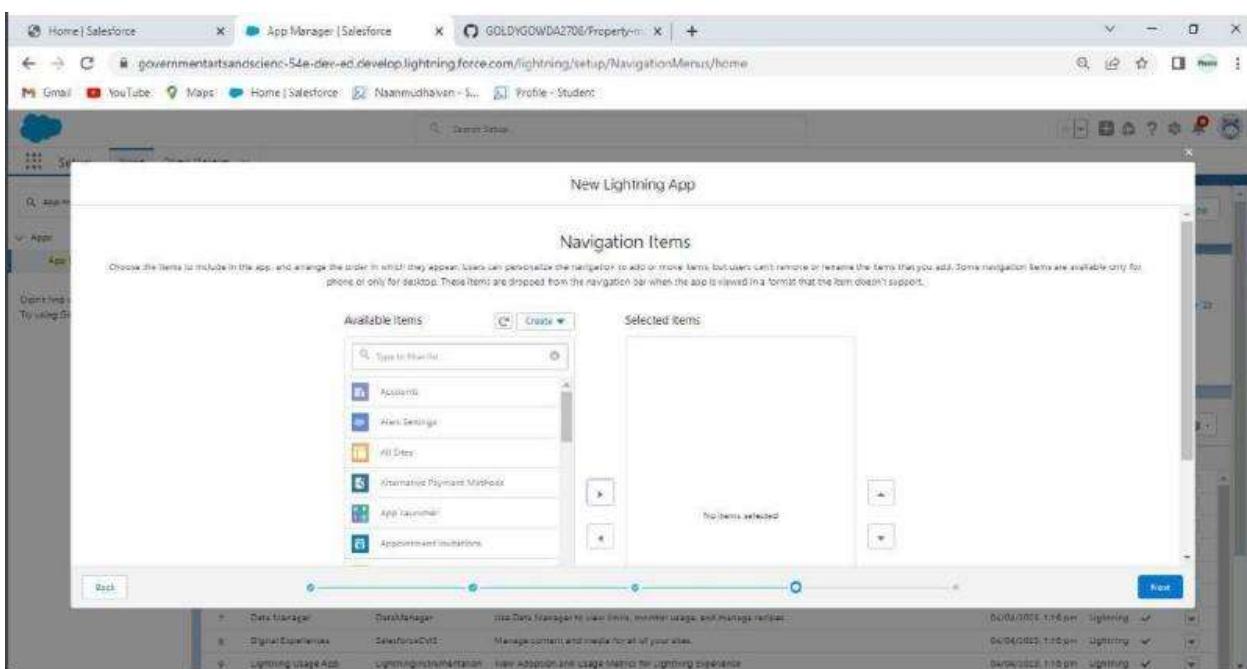
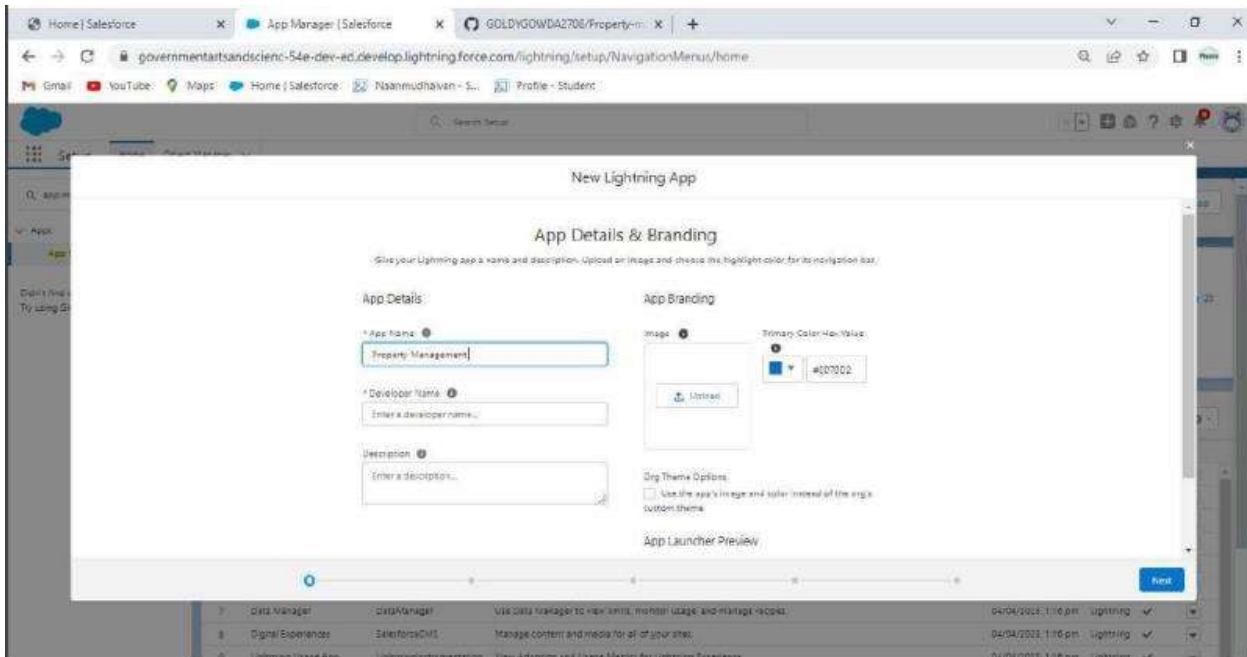
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and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

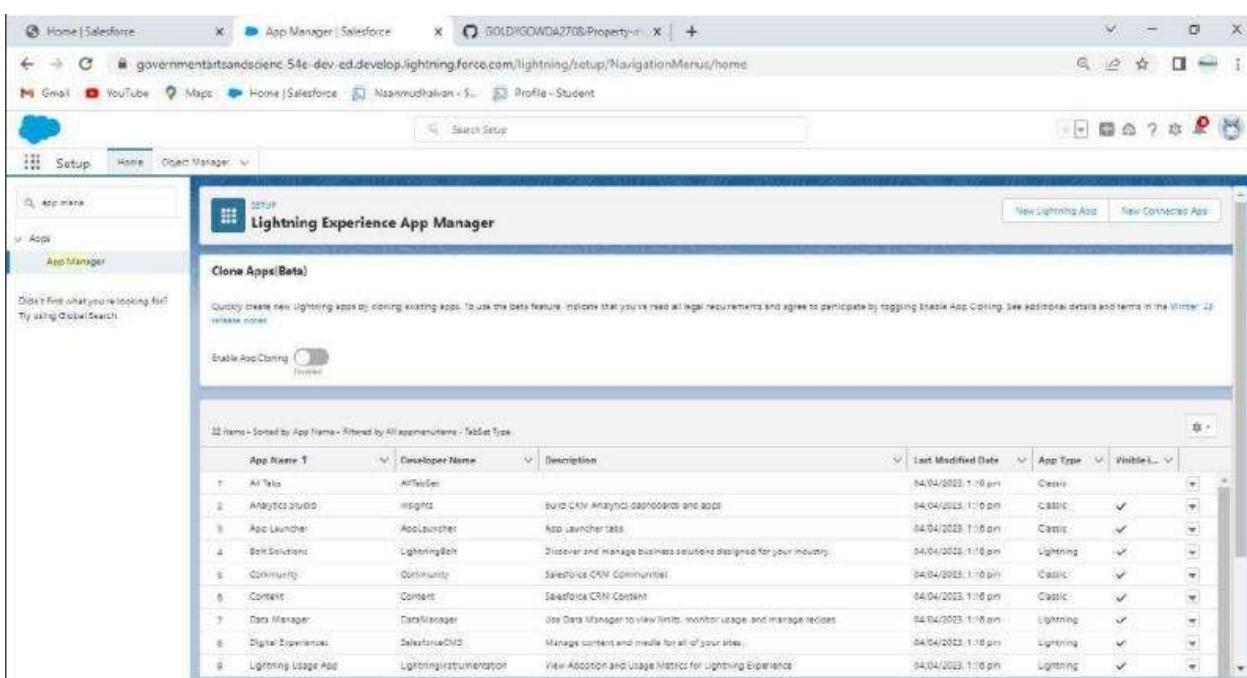
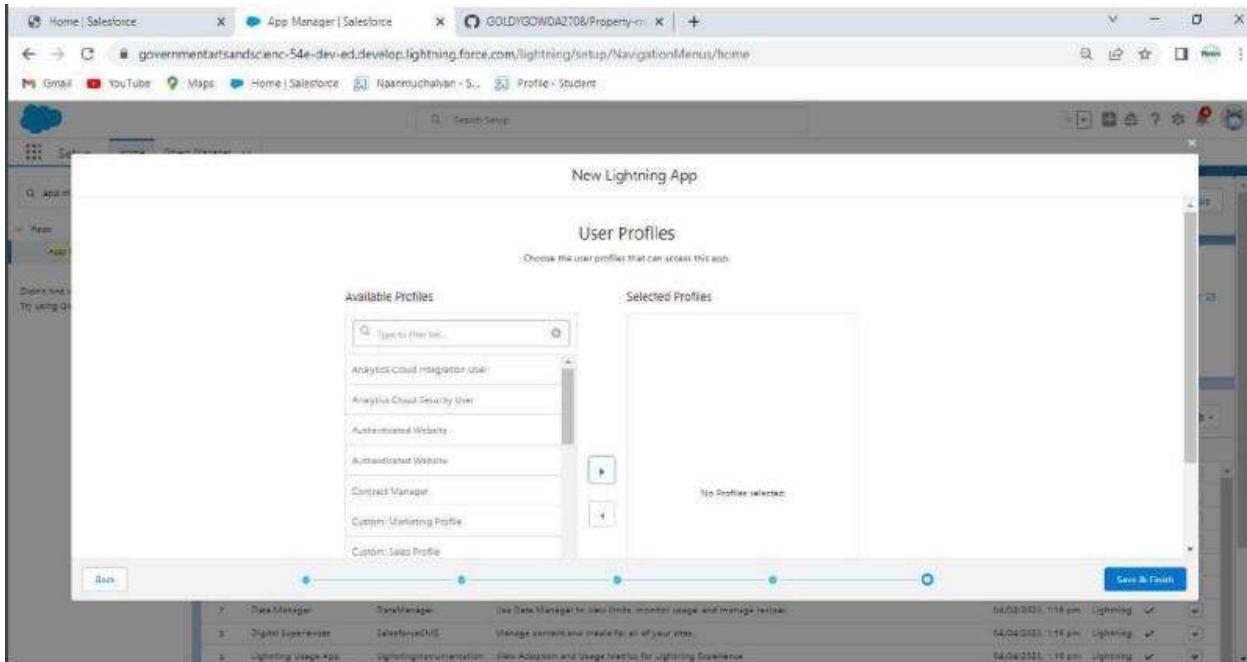
### **Activity 1:**



The screenshot shows the Salesforce Setup interface with the 'App Manager' tab selected. The main window displays the 'Lightning Experience App Manager' with the title 'Clone Apps(Beta)'. It includes a note about enabling app cloning and a toggle switch that is currently set to 'Disabled'. Below this, a table lists two apps: 'All Tabs' and 'Analytics Studio'. The table has columns for App Name, Developer Name, Description, Last Modified, and Active status. Both entries show they were last modified on 04/04/2023 at 1:16 pm and are marked as 'Classic'.

| App Name         | Developer Name | Description                             | Last Modified       | Active  |
|------------------|----------------|---|---------------------|---------|
| All Tabs         | AllTabSet      |   | 04/04/2023, 1:16 pm | Classic |
| Analytics Studio | Insights       | Build CRM Analytics dashboards and apps | 04/04/2023, 1:16 pm | Classic |





## Milestone5-Fields:

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

### Activity 1:

The screenshot shows two browser windows. The top window is titled "Object Manager | Salesforce" and displays the "Object Manager" page. It lists two items: "Lead\_\_c" (Custom Object) and "Lead" (Standard Object). The bottom window is titled "Lead | Salesforce" and displays the "Fields & Relationships" section for the Lead object. It shows seven fields: Created By, Last Modified By, Lead, Lead\_\_c, Leads\_\_c, Lead Name, and Owner. The "Lead" field is highlighted.

**Object Manager**

| LABEL   | API NAME | TYPE            | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|---------|----------|-----------------|-------------|---------------|----------|
| Lead__c | Lead__c  | Custom Object   |             | 07/04/2023    | ✓        |
| Lead    | Lead     | Standard Object |             |               |          |

**Lead**

**Fields & Relationships**

| FIELD LABEL      | FIELD NAME     | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|----------------|--------------------|-------------------|---------|
| Created By       | CreatedBy      | Lookup(User)       |                   |         |
| Last Modified By | LastModifiedBy | Lookup(User)       |                   |         |
| Lead             | Lead__c        | Auto Number        |                   |         |
| Lead             | Leads__c       | Email              |                   |         |
| Lead             | Leads__c       | Phone              |                   |         |
| Lead Name        | Name           | Auto Number        |                   | ✓       |
| Owner            | OwnerId        | Lookup(User/Group) |                   | ✓       |

Home | Salesforce Lead | Salesforce

governmentartsandscience-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003cYdy/FieldsAndRelationships/new

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Setup Home Object Manager

Search Setup

Help for this Page

Lead

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Lead

Display Format: L-(0000) Example: A-(0000) What Is This?

Starting Number: 0000

Generate Auto Number for existing records

Field Name: Lead

Description:

Help Text:

External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Previous Next Cancel

Home | Salesforce Lead | Salesforce

governmentartsandscience-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003cYdy/FieldsAndRelationships/new

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Setup Home Object Manager

Search Setup

Help for this Page

Lead

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: City

Values:  Use global picklist value set  Enter values, with each value separated by a new line

Mumbai  
Pune  
Nashik

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: City

Description:

Help Text:

Previous Next Cancel

Home | Salesforce Lead | Salesforce

governmentartsandscience-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003cYdy/FieldsAndRelationships/new

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Setup Home Object Manager

Search Setup

Help for this Page

SETUP > OBJECT MANAGER Lead

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label State

Values  Use global picklist value set  Enter values, with each value separated by a new line

Maharashtra  
Gujarat  
Rajasthan

Display values alphabetically, not in the order entered  
Use first value as default value  
Restrict picklist to the values defined in the value set

Field Name State

Description

Help Text

Step 2. Enter the details Step 2 of 4

Field Label Email

Field Name Email

Description

Help Text

Required  Always require a value in this field in order to save a record  
 Do not allow duplicate values  
 Set this field as the unique record identifier from an external system  
 Auto add to custom report types Add this field to existing custom report types that contain this entry

Default Value Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes ("the\_Name"), include numbers without quotes (123), single underscores in double quotes ("the\_name") and avoid using double underscores in field names. To reference a field from a custom Metadata type record use: \$CustomMetadataType\_\_r.*RecordName*.*Field\_\_c*

Home | Salesforce Lead | Salesforce

governmentartsandscience-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003cYdy/FieldsAndRelationships/new

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Setup Home Object Manager

Search Setup

Help for this Page

SETUP > OBJECT MANAGER Lead

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label Email

Field Name Email

Description

Help Text

Required  Always require a value in this field in order to save a record  
 Do not allow duplicate values  
 Set this field as the unique record identifier from an external system  
 Auto add to custom report types Add this field to existing custom report types that contain this entry

Default Value Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes ("the\_Name"), include numbers without quotes (123), single underscores in double quotes ("the\_name") and avoid using double underscores in field names. To reference a field from a custom Metadata type record use: \$CustomMetadataType\_\_r.*RecordName*.*Field\_\_c*

Home | Salesforce Lead | Salesforce

governmentartsandscience-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw000003cYdy/FieldsAndRelationships/new

Setup Home Object Manager

### Lead

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Phone  
Field Name: Phone  
Description:  
Help Text:  
Required:  Always require a value in this field in order to save a record  
Auto add to custom report type:  Add this field to existing custom report types that contain this entity  
Default Value: Show Formula Editor

Use formula editor. Enclose text and picklist value API names in double quotes ("like, 'test')". Include numbers without quotes (25). Show percentages as decimals (.10), and express date calculations in the standard format: (today) + 7. To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type\_\_r.RecordName.FieldName\_\_c}

Previous Next Cancel

Home | Salesforce Lead | Salesforce

governmentartsandscience-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw000003cYdy/FieldsAndRelationships/editDependency?co...

Setup Home Object Manager

### Lead

Edit Field Dependency

Controlling Field: State  
Dependent Field: City

Instructions:

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend: Excluded Value Included Value

Click button to include or exclude selected values from the dependent picklist:  
Include Values Exclude Values

| Showing Columns: 1 - 3 (of 3) < Previous   Next >   View All   Go to |                                 |                                   |
|--|---------------------------------|-----------------------------------|
| State: Maharashtra<br>City: Mumbai, Pune, Nashik                     | Gujarat<br>Mumbai, Pune, Nashik | Rajasthan<br>Mumbai, Pune, Nashik |
|  |                                 |                                   |

Click button to include or exclude selected values from the dependent picklist:  
Include Values Exclude Values

| Showing Columns: 1 - 3 (of 3) < Previous   Next >   View All |
|--|
|  |

Save Cancel Preview

The screenshot shows the Salesforce Object Manager interface for the Lead object. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled "Fields & Relationships" and displays a table of fields:

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| City             | City__c          | Picklist           | State             |         |
| Created By       | CreatedById      | Lookup(User)       |                   |         |
| Email            | Email__c         | Email              |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| Lead             | Lead__c          | Auto Number        |                   |         |
| Lead Name        | Name             | Auto Number        |                   | ✓       |
| Owner            | OwnerId          | Lookup(User/Group) |                   | ✓       |
| Phone            | Phone__c         | Phone              |                   |         |
| State            | State__c         | Picklist           |                   |         |

## Activity 2:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Home, Object Manager, and WhatsApp. The main content area is titled "Object Manager" and displays a table of custom objects:

| LABEL | API NAME  | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-------|-----------|---------------|-------------|---------------|----------|
| Buy   | Buy__c    | Custom Object |             | 05/04/2023    | ✓        |
| Buy   | Buy\$__c  | Custom Object |             | 05/04/2023    | ✓        |
| Buy   | Buyers__c | Custom Object |             | 05/04/2023    | ✓        |

Home | Salesforce    Buy | Salesforce    (2) WhatsApp

governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w000003cVMv/FieldsAndRelationships/view

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Setup Home Object Manager

Buy > OBJECT MANAGER

**Fields & Relationships**

4 items. Sorted by Field Label

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Buy Name         | Name             | Text(80)           |                   | ✓       |
| Created By       | CreatedById      | Lookup(User)       |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| Owner            | OwnerId          | Lookup(User Group) |                   | ✓       |

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Home | Salesforce    Buy | Salesforce    (2) WhatsApp

governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w000003cVMv/FieldsAndRelationships/new

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Setup Home Object Manager

Buy > OBJECT MANAGER

**New Custom Field**

Step 2. Enter the details Step 2 of 4

Field Label: Buy

Display Format: B-(0000) Example: A-(0000) What is This?

Starting Number: 0000  Generate Auto Number for existing records

Field Name: Buy

Description:

Help Text:

External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Previous Next Cancel

Home | Salesforce    Buy | Salesforce    (2) WhatsApp

governmentartsandscienc-54e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lw000003cVMv/FieldsAndRelationships/new

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Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Buy

**Buy** New Custom Field Step 2 of 4

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 Triggers

Field Label  Values  Enter values, with each value separated by a new line   
 Residential  
 Commercial  
 Industrial  Display values alphabetically, not in the order entered  Use first value as default value  Restrict picklist to the values defined in the value set   
 Field Name  Description Help Text

Field Label  Length  Decimal Places  Description   
 Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.00". Number of digits to the left of the decimal point   
 Field Name  Number of digits to the right of the decimal point   
 Description Help Text   
 Required  Always require a value in this field in order to save a record Auto add to custom report type  Add this field to existing custom report types that contain this entry   
 Default Value Show Formula Editor   
 Use formula editor. Shows basic text and standard arithmetic operators. On Anywhere in context, *(This Record)* includes numbers, without quotes.

Help for this Page

Home | Salesforce X Buy | Salesforce X (2) WhatsApp X +

governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003cVMv/FieldsAndRelationships/new

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Setup Home Object Manager

Search Setup

Help for this Page

SETUP > OBJECT MANAGER Buy

New Custom Field Step 2 of 4

Previous Next Cancel

Field Label: State

Values:  Use global picklist value set  Enter values, with each value separated by a new line

Maharashtra  
Gujarat  
Rajasthan

Display values alphabetically, not in the order entered  
Use first value as default value  
 Restrict picklist to the values defined in the value set

Field Name: State

Description:

Help Text:

Home | Salesforce X Buy | Salesforce X (2) WhatsApp X +

governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003cVMv/FieldsAndRelationships/new

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Setup Home Object Manager

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Help for this Page

SETUP > OBJECT MANAGER Buy

New Custom Field Step 2 of 4

Previous Next Cancel

Field Label: City

Values:  Use global picklist value set  Enter values, with each value separated by a new line

Mumbai  
Pune  
Nashik

Display values alphabetically, not in the order entered  
Use first value as default value  
 Restrict picklist to the values defined in the value set

Field Name: City

Description:

Help Text:

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governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003cVMv/FieldsAndRelationships/new

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SETUP > OBJECT MANAGER Buy

New Custom Field Step 2 of 4

Previous Next Cancel

Field Label: City

Values:  Use global picklist value set  Enter values, with each value separated by a new line

Mumbai  
Pune  
Nashik

Display values alphabetically, not in the order entered  
Use first value as default value  
 Restrict picklist to the values defined in the value set

Field Name: City

Description:

Help Text:

Home | Salesforce    Buy | Salesforce    (2) WhatsApp

governmentartsandscience-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cVMv/FieldsAndRelationships/editDependency?c...

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**Edit Field Dependency**

Controlling Field: State  
Dependent Field: City

**Instructions**

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To toggle the visibility of multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use Shift + click to select a range of adjacent cells. Use Ctrl + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend: Excluded Value Included Value

| Click button to include or exclude selected values from the dependent picklist: |                      |   |                              |
|---|----------------------|---|------------------------------|
| Include Values  | Exclude Values       | Showing Columns: 1 - 3 (of 3) < Previous   Next >   View All   Go to Rowset | Rowset: Mumbai, Pune, Nashik |
| State:  | Maharashtra          | Spiral  | Mumbai, Pune, Nashik         |
| City:   | Mumbai, Pune, Nashik | Pune  | Pune, Nashik                 |

Click button to include or exclude selected values from the dependent picklist:

Include Values | Exclude Values | Save | Cancel | Preview

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governmentartsandscience-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cVMv/FieldsAndRelationships/view

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**Fields & Relationships**  
9 items, Sorted by Field Label

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Buy              | Buy__c           | Auto Number        |                   |         |
| Buy Name         | Name             | Text(80)           |                   |         |
| City             | City__c          | Picklist           | State             |         |
| Created By       | CreatedBy        | Lookup(User)       |                   |         |
| Discount         | Discount__c      | Percent(18, 0)     |                   |         |
| Last Modified By | LastModifiedBy   | Lookup(User)       |                   |         |
| Owner            | OwnerId          | Lookup(User/Group) |                   |         |
| Property Type    | Property_Type__c | Picklist           |                   |         |
| State            | State__c         | Picklist           |                   |         |

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

### Activity 3:

The screenshot shows the Salesforce Object Manager page. At the top, there are three tabs: Home | Salesforce, Object Manager | Salesforce, and WhatsApp. The URL is governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home. Below the tabs, there are links for Gmail, YouTube, Maps, Home | Salesforce, Naarmudhalvan - S..., Profile - Student, Convert JPG to PDF..., and a search bar labeled "Search Setup". The main content area is titled "Object Manager" and shows a table with two items. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The first item is "Rent" with API name "Rent\_\_c" and type "Custom Object". The second item is "Rents\_\_c" with API name "Rents\_\_c" and type "Custom Object". Both items were last modified on 05/04/2023 and are deployed.

The screenshot shows the Salesforce object details page for the "Rent" object. At the top, there are three tabs: Home | Salesforce, Rent | Salesforce, and WhatsApp. The URL is governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003cVP1/FieldsAndRelationships/view. Below the tabs, there are links for Gmail, YouTube, Maps, Home | Salesforce, Naarmudhalvan - S..., Profile - Student, Convert JPG to PDF..., and a search bar labeled "Search Setup". The main content area is titled "Setup > OBJECT MANAGER Rent". On the left, there is a sidebar with various options: Details, Fields & Relationships (selected), 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, and Scoping Rules. The right side shows the "Fields & Relationships" section with a table. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. It lists five fields: "Buy Name" (Name, Text(80)), "Created By" (CreatedBy, Lookup(User)), "Last Modified By" (LastModifiedBy, Lookup(User)), "Owner" (OwnerId, Lookup(User,Group)), and "Rent" (Rent\_\_c, Auto Number). The "Rent" field is indexed.

Home | Salesforce Rent | Salesforce (2) WhatsApp governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i2w000003cVP1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Rent

**Rent**

**New Custom Field**

**Step 2. Enter the details** Step 2 of 4

Field Label:  Example: A-(0000) What is This?

Display Format:  Starting Number:  Generate Auto Number for existing records

Field Name:  Description:

Help Text:

External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entry

Previous Next Cancel

Home | Salesforce Rent | Salesforce (2) WhatsApp governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i2w000003cVP1/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Rent

**Rent**

**New Custom Field**

**Step 2. Enter the details** Step 2 of 4

Field Label:  Please enter the maximum length for a text field below.

Length:  Field Name:  Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values

- Treat "ABC" and "abc" as duplicate values (case insensitive)
- Treat "ABC" and "abc" as different values (case sensitive)

External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entry

Show Formula Editor Default Value:

Previous Next Cancel

**Rent**  
New Custom Field

**Step 2: Enter the details**

**Field Label:** BHK type

**Values:**

- Use global picklist value set
- Enter values, with each value separated by a new line

1BHK  
2BHK  
3BHK

**Field Name:** BHK\_type

**Description:**

**Help Text:**

**Object Manager**

| LABEL | API NAME   | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-------|------------|---------------|-------------|---------------|----------|
| Loan  | Loan__c    | Custom Object |             | 05/04/2023    | ✓        |
| Loan  | Loans__c   | Custom Object |             | 05/04/2023    | ✓        |
| Loan  | Loanses__c | Custom Object |             | 05/04/2023    | ✓        |

## Activity 4:

Home | Salesforce    Loan | Salesforce    (2) WhatsApp

governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003cVPG/FieldsAndRelationships/view

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Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Loan

**Fields & Relationships**

| FIELD LABEL      | FIELD NAME     | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|----------------|--------------------|-------------------|---------|
| Created By       | CreatedBy      | Lookup(User)       |                   |         |
| Last Modified By | LastModifiedBy | Lookup(User)       |                   |         |
| Loan Name        | Name           | Text(80)           |                   |         |
| Owner            | OwnerId        | Lookup(User/Group) |                   |         |

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

Home | Salesforce    Loan | Salesforce    (2) WhatsApp

governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003cVPG/FieldsAndRelationships/new

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Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Loan

**New Custom Field**

Step 2. Enter the details Step 2 of 4

Field Label:  Help for this Page

Display Format:  Example: A-(0000) What is This?

Starting Number:   Generate Auto Number for existing records

Field Name:  Description:

Help Text:

External ID:  Set this field as the unique record identifier from an external system  
 Add this field to existing custom report types that contain this entity

Previous Next Cancel

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governmentartsandscience-54e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Iw000003cVPG/FieldsAndRelationships/new

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Setup Home Object Manager

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Loan

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Interest Rate

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.00".

Length: 18

Number of digits to the left of the decimal point

Field Name: Interest\_Rate

Decimal Places: 0

Number of digits to the right of the decimal point

Description: Help Text:

Required:  Always require a value in this field in order to save a record

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula editor. Enclose text and picklist values in double quotes ("This", "that"), include numbers without quotes (10), show percentages as decimals (0.10), and express date calculations in the standard format (Today + 7). To reference a field from another Metadata type record, use {!MyCustomObject\_\_c.MyField}.

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Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Loan

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Term

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.00".

Length: 18

Number of digits to the left of the decimal point

Field Name: Term

Decimal Places: 0

Number of digits to the right of the decimal point

Description: Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values

External ID:  Set this field as the unique record identifier from an external system

AI Prediction:  Use this field to store AI prediction scores

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Windows Type here to search 08:20 ENG 09-04-2023

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Setup Home Object Manager

SETUP > OBJECT MANAGER

Loan

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Annual Loan

Length: 18  
Number of digits to the left of the decimal point

Decimal Places: 0  
Number of digits to the right of the decimal point

Field Name: Annual\_Loan

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values

External ID:  Set this field as the unique record identifier from an external system

AI Prediction:  Use this field to store AI prediction scores

Auto add to custom report type:  Add this field to existing custom report types that contain this entry

Help for this Page

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Setup Home Object Manager

SETUP > OBJECT MANAGER

Loan

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Total Loan Instalments

Length: 18  
Number of digits to the left of the decimal point

Decimal Places: 0  
Number of digits to the right of the decimal point

Field Name: Total\_Loan\_Instalments

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values

External ID:  Set this field as the unique record identifier from an external system

AI Prediction:  Use this field to store AI prediction scores

Auto add to custom report type:  Add this field to existing custom report types that contain this entry

Help for this Page

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Setup Home Object Manager

SETUP > OBJECT MANAGER

### Loan

#### New Custom Field

**Step 2. Enter the details**

Step 2 of 4

Field Label: **Loan Repayment**

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.99".

Length: **18** Number of digits to the left of the decimal point

Decimal Places: **0** Number of digits to the right of the decimal point

Field Name: **Loan\_Repayment**

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values

External ID:  Set this field as the unique record identifier from an external system

AI Prediction:  Use this field to store AI prediction scores

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

**Step 2. Choose output type**

Step 2 of 5

Field Label: **Loan Amount**

Field Name: **Loan\_Amount**

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Formula Return Type:

**Error: You must select a data type**

Select one of the data types below.

None Selected

Checkbox: Calculate a boolean value.  
Example: [TODAY] > CloseDate

**Currency**: Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: Gross Margin = Amount - Cost

Data: Calculate a date, for example, by adding or subtracting days to other dates.  
Example: Reminder Date = CloseDate + 7

Date/Time: Calculate a datetime, for example, by adding a number of hours or days to another date/time.  
Example: Next = NOW() + 1

Number: Calculate a numeric value.  
Example: [Fahrenheit] = 1.8 \* [Celsius] + 32

Percent: Calculate a percent and automatically add the percent sign to the number.  
Example: [Discount] = (Amount - Discounted\_Amount) / Amount

Text: Create a text string, for example, by concatenating other text fields.

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Cloud Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER  
Loan

**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
- Triggers
- Flow Triggers
- Validation Rules

**Step 3. Enter formula**

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Gross Margin = Amount - Cost [More Examples...](#)

[Simple Formulas](#) [Advanced Formulas](#)

**Insert Field:** **Insert Operator:** **Functions:**

```
Loan Amount (Currency) = 
  ( Loan_Repayment__c * ( ( 1 + ( Interest_Rate__c / 12 ) ) ^ Term__c ) - 1 ) / ( ( Interest_Rate__c / 12 ) * ( ( 1 + ( Interest_Rate__c / 12 ) ) ^ Term__c ) )
```

**Check Syntax:** No syntax errors in merge fields or functions. (Compiled size: 244 characters)

**Step 3 of 5** [Previous](#) [Next](#) [Cancel](#)

**Quick Tips:**

- Getting Started
- Introducing & Functions

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Cloud Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER  
Loan

**Details**

**Fields & Relationships** 11 items, Sorted by Field Label

| FIELD LABEL            | FIELD NAME                 | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------------|----------------------------|--------------------|-------------------|---------|
| Annual Loan            | Annual_Loan__c             | Number(18,0)       |                   |         |
| Created By             | CreatedById                | Lookup(User)       |                   |         |
| Interest Rate          | Interest_Rate__c           | Currency(18,0)     |                   |         |
| Last Modified By       | LastModifiedById           | Lookup(User)       |                   |         |
| Loan Amount            | Loan_Amount__c             | Formula(Currency)  |                   |         |
| Loan Id                | Loan_Id__c                 | Auto Number        |                   |         |
| Loan Name              | Name                       | Text(80)           |                   | ✓       |
| Loan Repayment         | Loan_Repayment__c          | Number(18,0)       |                   |         |
| Owner                  | OwnerId                    | Lookup(User/Group) |                   | ✓       |
| Term                   | Term__c                    | Number(18,0)       |                   |         |
| Total Loan Instalments | Total_Loan_Installments__c | Number(18,0)       |                   |         |

[Quick Find](#) [New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History Tracking](#)

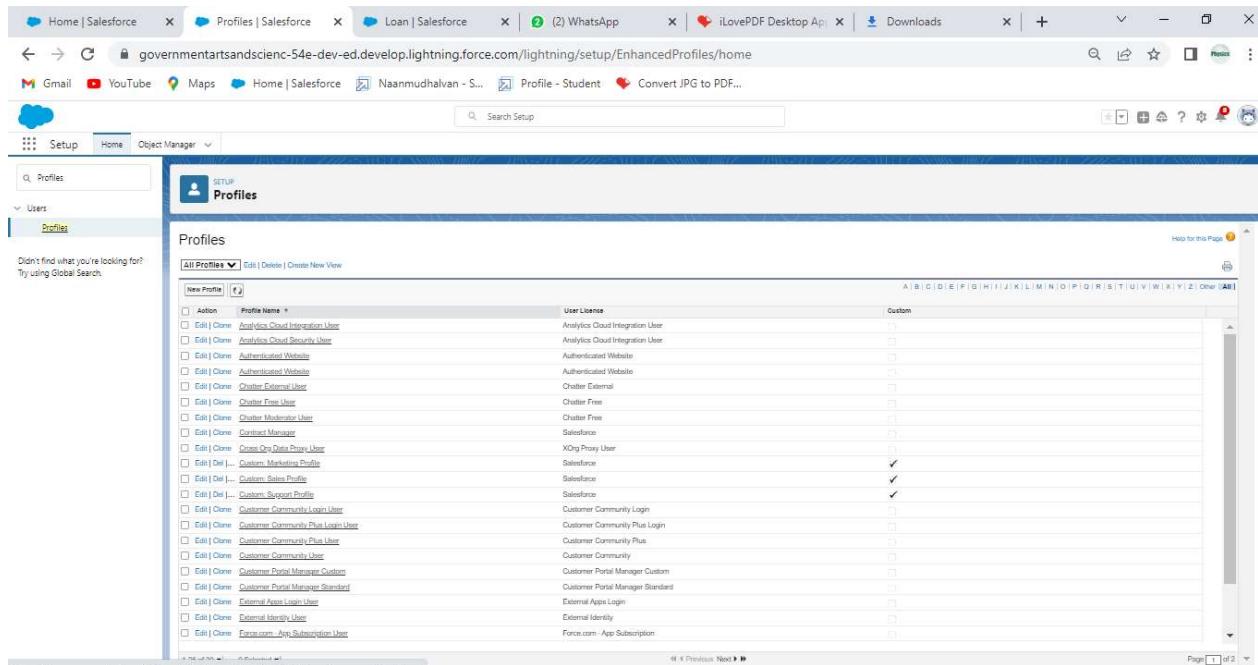
## **Milestone 6: Profile**

- 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.

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

- Standard profiles
- Custom Profiles

### **Activity 1:**



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'SETUP'. The main area displays a list of profiles, each with a checkbox, an action link ('Edit | Clone'), and a profile name. The columns include 'Action', 'Profile Name', 'User License', and 'Custom'. The 'User License' column lists various license types such as 'Analytic Cloud Integration User', 'Authenticator Website', 'Chatter External', 'Chatter Free', 'Salesforce', 'XOrg Proxy User', and 'Customer Community Plus'. The 'Custom' column contains checkboxes, many of which are checked for the 'Salesforce' license. Navigation links at the bottom include 'Previous' and 'Next'.

Home | Salesforce | Profiles | Salesforce | Loan | Salesforce | (2) WhatsApp | iLovePDF Desktop Ap... | Downloads | + | - | X

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Cloud Setup Home Object Manager

Search Setup

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile Standard User  
User License Salesforce  
Profile Name

Save Cancel

Home | Salesforce | Profiles | Salesforce | Loan | Salesforce | (2) WhatsApp | iLovePDF Desktop Ap... | Downloads | + | - | X

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Cloud Setup Home Object Manager

Search Setup

Profiles

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 Ranges | Enabled Area 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 Custom Page Access | Enabled Record Type Access | Enabled Service Pipeline Rule Access | Enabled Custom Permissions |

Profile Detail

Name Standard User  
User License Salesforce  
Description  
Created By GONTHAM A, 09/04/2023, 9:12 am  
Modified By GONTHAM A, 09/04/2023, 9:12 am

Page Layouts

Standard Object Layouts

| Object                     | Layout                                       |
|----------------------------|--|
| Global                     | Global Layout [View All]                     |
| Email Application          | Not Assigned [View Assignment]               |
| Home Page Layout           | DC Default [View Assignment]                 |
| Account                    | Not Assigned [View Assignment]               |
| Alternative Payment Method | Not Assigned [View Assignment]               |
| Appointment Invitation     | Not Assigned [View Assignment]               |
| Asset                      | Asset Layout [View Assignment]               |
| Asset Action               | Not Assigned [View Assignment]               |
| Asset Action Source        | Asset Action Source Layout [View Assignment] |
| Asset Relationship         | Not Assigned [View Assignment]               |
| Asset State Period         | Asset State Period Layout [View Assignment]  |

Object Milestone

| Object                           | Milestone Layout  |
|----------------------------------|---|
| Object Milestone                 | Object Milestone Layout [View Assignment]                 |
| Operating Hours                  | Operating Hours Layout [View Assignment]                  |
| Opportunity                      | Opportunity Layout [View Assignment]                      |
| Opportunity Product              | Opportunity Product Layout [View Assignment]              |
| Order                            | Order Layout [View Assignment]                            |
| Order Product                    | Order Product Layout [View Assignment]                    |
| Payment                          | Payment Layout [View Assignment]                          |
| Payment Authorization            | Payment Authorization Layout [View Assignment]            |
| Payment Authorization Adjustment | Payment Authorization Adjustment Layout [View Assignment] |
| Payment Gateway                  | Payment Gateway Layout [View Assignment]                  |
| Payment Gateway Log              | Payment Gateway Log Layout [View Assignment]              |

The screenshot shows the Salesforce Setup interface with the following tabs open: Home | Salesforce, Profiles | Salesforce, Loan | Salesforce, (2) WhatsApp, iLovePDF Desktop App, and Downloads. The current view is the Profiles page under the Object Manager section.

**Profiles**

**Custom Object Permissions**

|        | Basic Access                        | Create                              | Edit                                | Delete                              | View All                            | Modify All                          |
|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Buyers | <input checked="" type="checkbox"/> |
| Buyer  | <input checked="" type="checkbox"/> |
| Buyers | <input checked="" type="checkbox"/> |
| Leads  | <input checked="" type="checkbox"/> |
| Loans  | <input checked="" type="checkbox"/> |

|       | Basic Access                        | Create                              | Edit                                | Delete                              | View All                            | Modify All                          |
|-------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Loans | <input checked="" type="checkbox"/> |
| Rents | <input checked="" type="checkbox"/> |
| Rents | <input checked="" type="checkbox"/> |

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

|   |   |
|---|---|
| User passwords expire in:                                 | 90 days                                   |
| Enforce password history:                                 | 3 passwords remembered                    |
| Minimum password length:                                  | 8   |
| Password complexity requirement:                          | Must include alpha and numeric characters |
| Password question requirement:                            | Cannot contain password                   |
| Maximum invalid login attempts:                           | 10  |
| Logout effective period:                                  | 15 minutes                                |
| Require a secured answer for password resets:             | <input type="checkbox"/>                  |
| Require a minimum 1 day password lifetime:                | <input type="checkbox"/>                  |
| Don't immediately expire links in forgot password emails: | <input type="checkbox"/>                  |

Save Save & New Cancel

The screenshot shows the Salesforce Setup interface for managing Profiles. The top navigation bar includes links for Gmail, YouTube, Maps, Home | Salesforce, Naamudhalvan - S..., Profile - Student, Convert JPG to PDF..., and various system icons. The main header has a search bar labeled "Search Setup". Below the header, there's a breadcrumb trail: "Setup" > "Profiles". A sidebar on the left lists "Users" and "Profiles". The main content area is titled "Profiles" and shows a "Standard User" profile. It includes sections for "Profile Details" (Name: Standard User, User License: Salesforce, Description: null, Created By: GOWTHAM.A, Created Date: 09/04/2023, 9:16 am) and "Page Layouts" (listing Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Asset Action, Asset Action Record, Asset Action Record Layout, Asset Relationship, Asset Status, and Asset State Period). Each item in the list has a "View Assignment" link. The bottom of the page features a toolbar with links for Log IP Address, Enabled Cross-Cloud Access, Enabled VaultAuth Page Access, Enabled External Data Source Access, Enabled Named Credential Access, Enabled Custom Metadata Type Access, Enabled Custom Setting Definition Access, Enabled Flow Access, and Enabled Service Pipeline Status Access.

## Activity 2:

Profile Marketing

Profile Detail

|              |                              |                                  |                                     |
|--------------|------------------------------|----------------------------------|-------------------------------------|
| Name         | Marketing                    | Custom Profile                   | <input checked="" type="checkbox"/> |
| User License | Salesforce Platform          | Operating Hours                  | <input type="checkbox"/>            |
| Description  |                              | Order                            | <input type="checkbox"/>            |
| Created By   | GONTIAMA 09/04/2023, 9:33 am | Order Product                    | <input type="checkbox"/>            |
|              |                              | Payment                          | <input type="checkbox"/>            |
|              |                              | Payment Authorization            | <input type="checkbox"/>            |
|              |                              | Payment Authorization Adjustment | <input type="checkbox"/>            |
|              |                              | Payment Strategy                 | <input type="checkbox"/>            |
|              |                              | Payment Gateway Log              | <input type="checkbox"/>            |
|              |                              | Payment Group                    | <input type="checkbox"/>            |
|              |                              | Payment Line Item                | <input type="checkbox"/>            |

Page Layouts

Standard Object Layouts

|                            |   |                                  |   |
|----------------------------|---|----------------------------------|---|
| Global                     | Global Layout<br>[View As Assigned]                     | Object Milestone                 | Object Milestone Layout<br>[View As Assigned]                 |
| Email Application          | All Assigned<br>[View As Assigned]                      | Operating Hours                  | Operating Hours Layout<br>[View As Assigned]                  |
| Home Page Layout           | Home Page Default<br>[View As Assigned]                 | Order                            | Order Layout<br>[View As Assigned]                            |
| Account                    | All Assigned<br>[View As Assigned]                      | Order Product                    | Order Product Layout<br>[View As Assigned]                    |
| Alternative Payment Method | Alternative Payment Method Layout<br>[View As Assigned] | Payment                          | Payment Layout<br>[View As Assigned]                          |
| Appointment Invitation     | Appointment Invitation Layout<br>[View As Assigned]     | Payment Authorization            | Payment Authorization Layout<br>[View As Assigned]            |
| Asset                      | All Assigned<br>[View As Assigned]                      | Payment Authorization Adjustment | Payment Authorization Adjustment Layout<br>[View As Assigned] |
| Asset Relationship         | All Assigned<br>[View As Assigned]                      | Payment Strategy                 | Payment Strategy Layout<br>[View As Assigned]                 |
| Assigned Resource          | All Assigned<br>[View As Assigned]                      | Payment Gateway Log              | Payment Gateway Log Layout<br>[View As Assigned]              |
| Authorization Form         | Authorization Form Layout<br>[View As Assigned]         | Payment Group                    | Payment Group Layout<br>[View As Assigned]                    |
| Authorization Form Consent | Authorization Form Consent Layout<br>[View As Assigned] | Payment Line Item                | Payment Line Item Layout<br>[View As Assigned]                |

javascriptrsrcUp(%27%2F00e2w00000faXV%3Fisdt%3Dp1%27);

Custom Object Permissions

|        | Basic Assets                        |                                     |                                     |                                     |                                     | Basic Records            |                                     |                                     |                                     |                                     |                          |                          |
|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
|        | Read                                | Create                              | Edit                                | Delete                              | View All                            | Modify All               | Read                                | Create                              | Edit                                | Delete                              | View All                 | Modify All               |
| Buyers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Buyers | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Buyers | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Leads  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Loans  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

|  |  |
|--|--|
| User passwords expire in: 90 days  | Enforce password history: 3 passwords remembered                           |
| Minimum password length: 8   | Password complexity requirement: Must include alpha and numeric characters |
| Maximum invalid login attempt: 10  | Lookout effective period: 15 minutes                                       |
| Observe secret answer for password resets: <input type="checkbox"/>                | Require a minimum 1 day password lifetime: <input type="checkbox"/>        |
| Don't immediately expire links in forgot password emails: <input type="checkbox"/> |  |

javascriptrsrcUp(%27%2F00e2w00000faXV%3Fisdt%3Dp1%27);

Home | Salesforce | Profiles | Salesforce | Loan | Salesforce | (2) WhatsApp | iLovePDF Desktop Ap... | Downloads | + | - | X

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Cloud Setup Home Object Manager Search Setup

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Marketing

User License: Salesforce Platform

Profile Name: Marketing Executive 1

Save Cancel

Home | Salesforce | Profiles | Salesforce | Loan | Salesforce | (2) WhatsApp | iLovePDF Desktop Ap... | Downloads | + | - | X

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Cloud Setup Home Object Manager Search Setup

Profiles

Marketing Executive 1

Profile Detail

Name: Marketing Executive 1  
User License: Salesforce Platform  
Description:  
Created By: GOWTHAM A 09/04/2023, 9:36 am  
Modified By: GOWTHAM A 09/04/2023, 9:36 am

Custom Profile: ✓

Page Layouts

Standard Object Layouts

| Object                     | Layout  |
|----------------------------|---|
| Global                     | Global Layout [View Assignment]                     |
| Email Application          | Email Layout [View Assignment]                      |
| Home Page Layout           | Home Page Default [View Assignment]                 |
| Account                    | Account Layout [View Assignment]                    |
| Alternative Payment Method | Alternative Payment Method Layout [View Assignment] |
| Appointment Invitation     | Appointment Invitation Layout [View Assignment]     |
| Asset                      | Asset Layout [View Assignment]                      |
| Asset Relationship         | Asset Relationship Layout [View Assignment]         |
| Assigned Resource          | Assigned Resource Layout [View Assignment]          |
| Authorization Form         | Authorization Form Layout [View Assignment]         |
| Authorization Form Consent | Authorization Form Current Layout [View Assignment] |

Object Milestone: Object Milestone Layout [View Assignment]

Operating Hours: Operating Hours Layout [View Assignment]

Order: Order Layout [View Assignment]

Order Product: Order Product Layout [View Assignment]

Payment: Payment Layout [View Assignment]

Payment Authorization: Payment Authorization Layout [View Assignment]

Payment Authorization Adjustment: Payment Authorization Adjustment Layout [View Assignment]

Payment Delivery: Payment Delivery Layout [View Assignment]

Payment Gateway Log: Payment Gateway Log Layout [View Assignment]

Payment Group: Payment Group Layout [View Assignment]

Payment Line Invoice: Payment Line Invoice Layout [View Assignment]

Salesforce Setup - Profiles

Home | Salesforce | Profiles | Salesforce | Loan | Salesforce | (2) WhatsApp | iLovePDF Desktop App | Downloads | + | - | X

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Cloud Setup Home Object Manager Search Setup

**SETUP Profiles**

Customizable Object Permissions

| Basic Access |                                     |                                     |                                     | Object Administration               |                          |                          |  |
|--------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--|
|              | Read                                | Create                              | Edit                                | Delete                              | View All                 | Modify All               |  |
| Buyers       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Buyers       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Buyers       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Leads        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Loans        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |

| Basic Access |                                     |                                     |                                     | Object Administration               |                          |                          |  |
|--------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--|
|              | Read                                | Create                              | Edit                                | Delete                              | View All                 | Modify All               |  |
| Loans        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Loans        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Rents        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Rents        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User password expires in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Logout effective period: 15 minutes

Require a minimum 1 day password lifetime

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Marketing

User License: Salesforce Platform

Profile Name: Marketing Executive 2

Save Cancel

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A specific profile, 'Marketing Executive 2', is being viewed. The profile details include its name, user license (Salesforce Platform), and creation information (by GOWTHAM A on 09/04/2023 at 9:37 am). The 'Page Layouts' section lists various standard object layouts assigned to this profile, such as Global Layout for Standard Object Layouts and Alternative Payment Method Layout for Alternative Payment Method.

Search Setup

## Profiles

Background Options

|  |                                     |
|--|-------------------------------------|
| Business Brands                          | <input checked="" type="checkbox"/> |
| Communication Subscriptions              | <input checked="" type="checkbox"/> |
| Communication Subscription Channel Types | <input checked="" type="checkbox"/> |
| Communication Subscription Consents      | <input checked="" type="checkbox"/> |
| Communication Subscription Timings       | <input checked="" type="checkbox"/> |
| Contacts                                 | <input checked="" type="checkbox"/> |
| Contact Point Addresses                  | <input type="checkbox"/>            |
| Contact Point Consents                   | <input checked="" type="checkbox"/> |
| Contact Point Emails                     | <input checked="" type="checkbox"/> |

Engagement Channel Types

|                           |                                     |
|---------------------------|-------------------------------------|
| Documents                 | <input checked="" type="checkbox"/> |
| Ideas                     | <input checked="" type="checkbox"/> |
| Individuals               | <input checked="" type="checkbox"/> |
| Locations                 | <input type="checkbox"/>            |
| Party Consents            | <input checked="" type="checkbox"/> |
| Push Topics               | <input checked="" type="checkbox"/> |
| Sellers                   | <input checked="" type="checkbox"/> |
| Streaming Channels        | <input checked="" type="checkbox"/> |
| User External Credentials | <input type="checkbox"/>            |

Custom Object Permissions

|        | Read                                | Create                              | Edit                                | Delete                              | View All                 | Modify All               |
|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| Buyers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Buyers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Buyers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Leads  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Loans  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

|       | Read                                | Create                              | Edit                                | Delete                              | View All                 | Modify All               |
|-------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| Loans | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Loans | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Rents | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Rents | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Session Settings

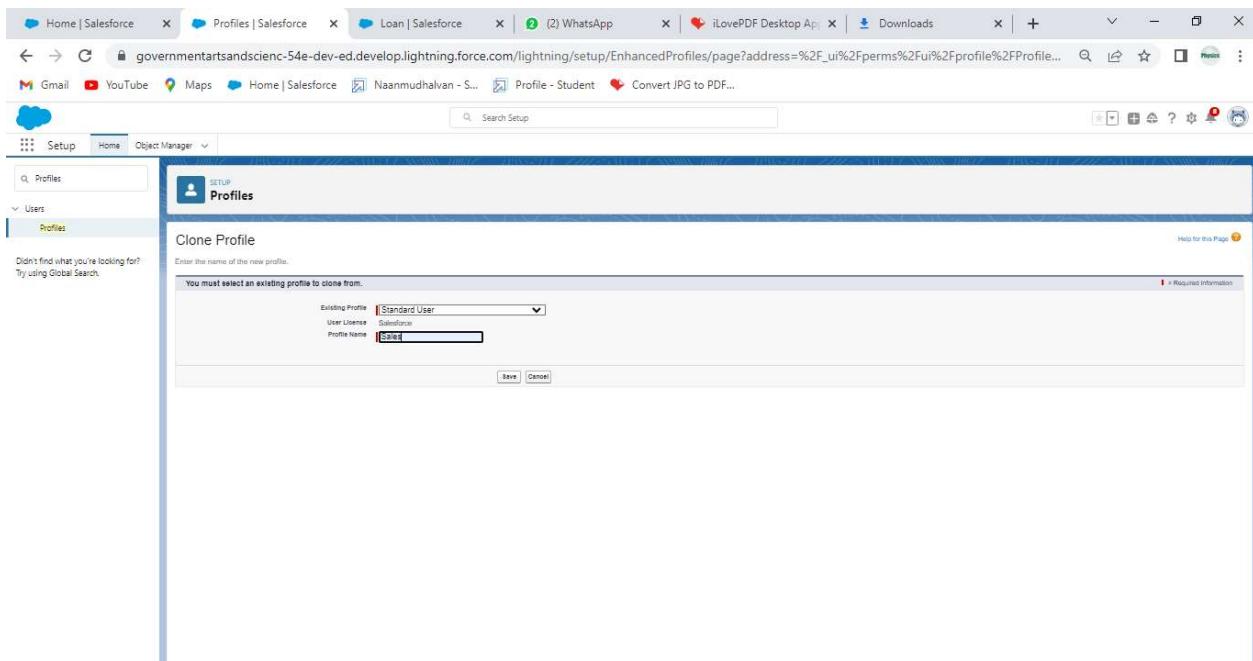
session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

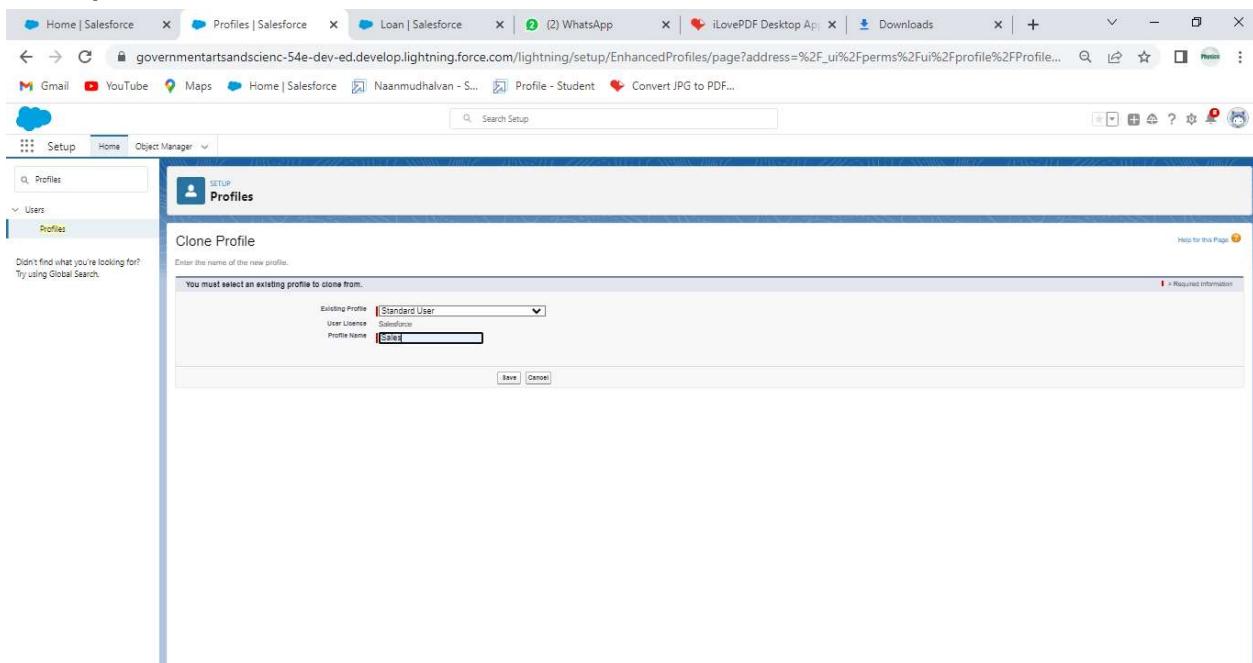
Password Policies

User passwords expire in: 90 days

Enforce password history: 15 previous work remainders



### Activity 3:



Screenshot of the Salesforce Setup interface showing the Profiles page.

The top navigation bar includes links for Home, Profiles, Loan, WhatsApp, iLovePDF Desktop App, Downloads, and various system status indicators.

The main content area displays the "Profiles" setup page with the following sections:

- Custom Object Permissions:** Shows permissions for Invoices, Leads, Work Type Groups, Buyers, Buyers, Buyers, Leads, Loans, and Rents.
- Session Settings:** Session Times Out After: 2 hours of inactivity; Session Security Level Required at Login: None.
- Password Policies:** User passwords expire in: 90 days; Enforce password history: 3 passwords remembered; Minimum password length: 8; Password complexity requirement: Must include alpha and numeric characters; Password question requirement: Cannot contain password; Maximum invalid login attempts: 15; Lockout effective period: 15 minutes; Observe secret answer for password reset: unchecked; Requires a minimum 1 day password lifetime: unchecked; Don't immediately expire links in forgot password emails: unchecked.

At the bottom of the page are Save, Save & New, and Cancel buttons.

**Clone Profile:**

Enter the name of the new profile. You must select an existing profile to clone from.

Existing Profile: Sales  
User License: Salesforce Integration  
Profile Name: Sales Rep 1

Save Cancel

The screenshot shows the Salesforce Profiles page. The top navigation bar includes tabs for Home | Salesforce, Profiles | Salesforce, Loan | Salesforce, WhatsApp, iLovePDF Desktop App, and Downloads. Below the navigation is a search bar with the placeholder "Search Setup". The main content area displays the "Sales Rep 1" profile under the "Profiles" section. The profile details include:

- Name: Sales Rep 1
- User License: Salesforce Integration
- Description: (empty)
- Created By: GONTIAMA (09/04/2023, 9:29 am)
- Modified By: GONTIAMA (09/04/2023, 9:29 am)

Below the profile details is a "Page Layouts" section showing various object layouts assigned to the profile:

| Standard Object Layout      | Global   | Opportunity Product                            |
|-----------------------------|--|--|
| Email Application           | Global Layout [View Assignment]                      | Opportunity Product Layout [View Assignment]   |
| Home Page Layout            | Not Assigned [View Assignment]                       | Order Layout [View Assignment]                 |
| Account                     | Home Page Default [View Assignment]                  | Order Product Layout [View Assignment]         |
| Appointment Invitation      | Account Layout [View Assignment]                     | Payment Authorization Layout [View Assignment] |
| Asset                       | Appointment Invitation Layout [View Assignment]      | Payment Gateway Layout [View Assignment]       |
| Asset Relationship          | Asset Layout [View Assignment]                       | Payment Gateway LayoutA [View Assignment]      |
| Assigned Resource           | Asset Relationship Layout [View Assignment]          | Payment Gateway LayoutB [View Assignment]      |
| Authorization Form          | Approved Resource Layout [View Assignment]           | Payment Gateway LayoutC [View Assignment]      |
| Authorization Form Consent  | Authorization Form Layout [View Assignment]          | Payment Group Layout [View Assignment]         |
| Authorization Form Data Use | Authorization Form Consent Layout [View Assignment]  | Price Book Layout [View Assignment]            |
| Authorization Form Text     | Authorization Form Data Use Layout [View Assignment] | Price Book Entry Layout [View Assignment]      |
|                             | Authorization Form Text Layout [View Assignment]     | Process Exception Layout [View Assignment]     |

Home | Salesforce

governmentartsandscienc-54e-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w00000faX6%2Fe%3FretURL%3D%...

Search Setup

Setup Home Object Manager

Q. Profiles

Users Profiles

Didn't find what you're looking for?  
Try using Global Search.

## Profiles

|               | Basic Access                        | Create                              | Edit                                | Delete                              | View All                 | Modify All               | Basic Access  | Create                              | Edit                                | Delete                              | View All                            | Modify All               |
|---------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|---------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| <b>Buyer</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <b>Buyers</b> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <b>Buyers</b> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <b>Buyers</b> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <b>Leads</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <b>Leads</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <b>Loans</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <b>Loans</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <b>Loans</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <b>Loans</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <b>Rents</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <b>Rents</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <b>Rents</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <b>Rents</b>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Session Settings

Session times out after **2 hours of inactivity**

Session Security Level Required at Login **None**

Password Policies

User passwords expire in **90 days**

Enforce password history **3 passwords remembered**

Minimum password length **8**

Password complexity requirement **Must include alpha and numeric characters**

Password question requirement **Cannot contain password**

Maximum invalid login attempts **10**

Lockout effective period **15 minutes**

Observe secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save Save & New Cancel

Home | Salesforce | Profiles | Salesforce | Loan | Salesforce | (2) WhatsApp | iLovePDF Desktop App | Downloads | + | - | X

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Cloud Setup Home Object Manager

Search Setup

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Sales

User License: Salesforce Integration

Profile Name: Sales Rep 2

Save Cancel

Home | Salesforce | Profiles | Salesforce | Loan | Salesforce | (2) WhatsApp | iLovePDF Desktop App | Downloads | + | - | X

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Cloud Setup Home Object Manager

Search Setup

Profiles

Sales Rep 2

Profile Detail

Name: Sales Rep 2

User License: Salesforce Integration

Description:

Created By: GONTHAMA 09/04/2023, 9:30 am

Modified By: GONTHAMA 09/04/2023, 9:30 am

Custom Profile: ✓

Page Layouts

Standard Object Layouts

| Object                      | Layout                             | View Assignment   |
|-----------------------------|------------------------------------|-------------------|
| Global                      | Global Layout                      | [View Assignment] |
| Email Application           | Not Assigned                       | [View Assignment] |
| Home Page Layout            | Home Page Default                  | [View Assignment] |
| Account                     | Account Layout                     | [View Assignment] |
| Appointment Invitation      | Appointment Invitation Layout      | [View Assignment] |
| Asset                       | Asset Layout                       | [View Assignment] |
| Asset Relationship          | Asset Relationship Layout          | [View Assignment] |
| Assigned Resource           | Assigned Resource Layout           | [View Assignment] |
| Authorization Form          | Authorization Form Layout          | [View Assignment] |
| Authorization Form Consent  | Authorization Form Consent Layout  | [View Assignment] |
| Authorization Form Data Use | Authorization Form Data Use Layout | [View Assignment] |

Opportunity Product: Opportunity Product Layout [View Assignment]

Order: Order Layout [View Assignment]

Order Product: Order Product Layout [View Assignment]

Payment Authorization: Payment Authorization Layout [View Assignment]

Payment Gateway: Payment Gateway Layout [View Assignment]

Payment Gateway Log: Payment Gateway Log Layout [View Assignment]

Payment Group: Payment Group Layout [View Assignment]

Price Book: Price Book Layout [View Assignment]

Price Book Entry: Price Book Entry Layout [View Assignment]

Process Exception: Process Exception Layout [View Assignment]

Product: Product Layout [View Assignment]

Salesforce | Home | Profiles | Loan | Lightning | WhatsApp | iLovePDF Desktop App | Downloads | Setup | Home | Object Manager | Search Setup | Help

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Cloud Setup Home Object Manager

Profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Custom Object Permissions

|        | Basic Access                        | Create                              | Edit                                | Delete                              | View All                 | Modify All               |
|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| Buyers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Buyers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Buyers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Leads  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Loans  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

|       | Basic Access                        | Create                              | Edit                                | Delete                              | View All                            | Modify All               |
|-------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| Loans | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| Loans | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| Rents | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Rents | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lookout effective period: 15 minutes

Require a secret answer for password reset:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Save Save & New Cancel

- Student | GOLDYGOV | Screenshot | Home | Sales | Profiles | Loan | Screenshot | Screenshot | Screenshot | Screenshot | + | Help for this Page | Help

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Cloud Setup Home Object Manager

Profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Sales

User License: Salesforce

Profile Name: Sales Rep 3

Save Cancel

Screenshot of the Salesforce Setup interface showing the Profiles page for a 'Sales Rep 3' profile.

**Profile Detail:**

- Name: Sales Rep 3
- User License: Salesforce Integration
- Description: Salesforce Integration
- Created By: GOLDYGOV (09/04/2023, 9:31 am)
- Modified By: GOLDYGOV (09/04/2023, 9:31 am)

**Page Layouts:**

| Object                      | Layout                             | Description      |
|-----------------------------|------------------------------------|------------------|
| Global                      | Global Layout                      | [View As Person] |
| Email Application           | Not Assigned                       | [View As Person] |
| Home Page Layout            | Home Page Default                  | [View As Person] |
| Account                     | Account Layout                     | [View As Person] |
| Appointment Invitation      | Appointment Invitation Layout      | [View As Person] |
| Asset                       | Asset Layout                       | [View As Person] |
| Asset Relationship          | Asset Relationship Layout          | [View As Person] |
| Assigned Resource           | Assigned Resource Layout           | [View As Person] |
| Authorization Form          | Authorization Form Layout          | [View As Person] |
| Authorization Form Consent  | Authorization Form Consent Layout  | [View As Person] |
| Authorization Form Date Use | Authorization Form Date Use Layout | [View As Person] |

**Custom Object Permissions:**

| Object | Read                                | Create                              | Edit                                | Delete                              | View All                 | Modify All               |
|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| Buyers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Buyers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Buyers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Leads  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Loans  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Loans  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Rents  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Rents  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Session Settings:**

- Session Times Out After: 2 hours of inactivity
- Session Security Level Required at Login: None

**Password Policies:**

- User password expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Login attempt effective period: 15 minutes
- Observe secret answer for password resets:
- Requires a minimum 1 day password lifetime:
- Don't immediately expire links in forgot password emails:

**Buttons:**

- Save
- Save & New
- Cancel

**Help:**

- Help for this Page
- Convert JPG to PDF...

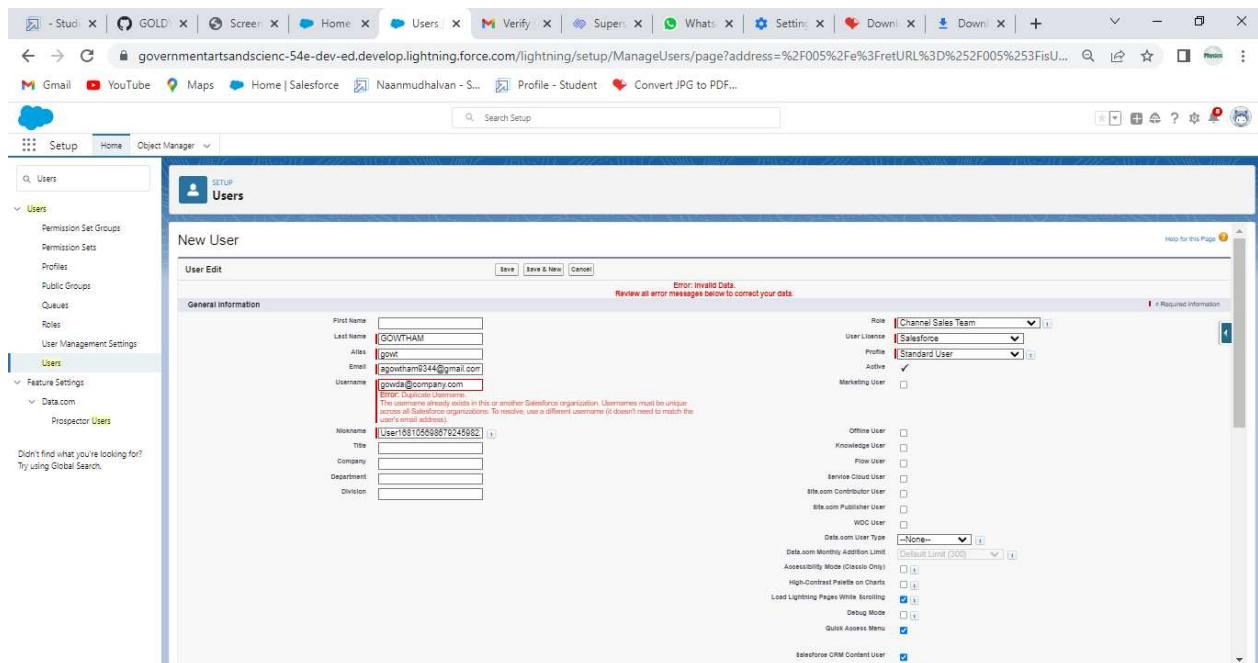
## **Milestone7-New User:**

- 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:**

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar navigation includes 'Users' (selected), 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', and 'Prospecter Users'. The main content area is titled 'All Users' and displays a table of users. The columns are 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. There are five users listed:

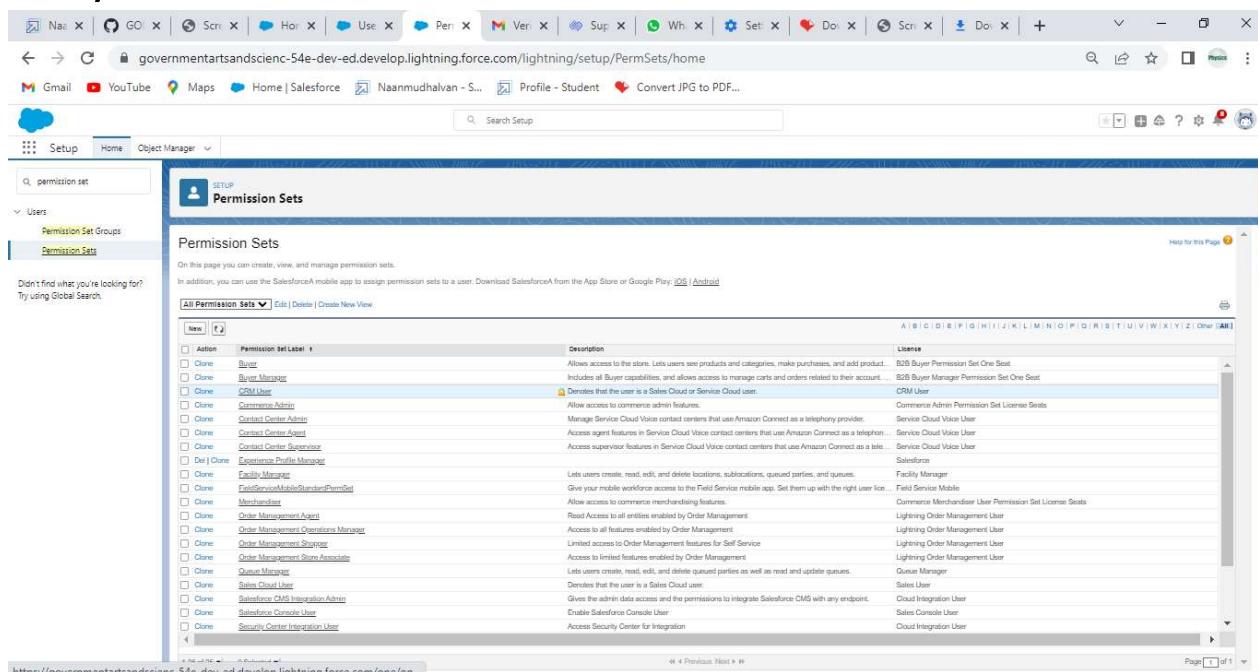
| Action                   | Full Name        | Alias | Username                                 | Role                           | Active                              | Profile                        |
|--------------------------|------------------|-------|--|--------------------------------|-------------------------------------|--------------------------------|
| <input type="checkbox"/> | A_GOWTHAM        | GA    | ga@sfmcn001.ap1.salesforce.com           | System Administrator           | <input checked="" type="checkbox"/> | System Administrator           |
| <input type="checkbox"/> | Customer Guest   | Guest | guest@sfmcn001.ap1.salesforce.com        | Guest Free User                | <input checked="" type="checkbox"/> | Guest Free User                |
| <input type="checkbox"/> | User Integration | UIP   | integration@sfmcn001.ap1.salesforce.com  | Analyst Cloud Integration User | <input checked="" type="checkbox"/> | Analyst Cloud Integration User |
| <input type="checkbox"/> | User_Security    | US    | usersecurity@sfmcn001.ap1.salesforce.com | Analyst Cloud Security User    | <input checked="" type="checkbox"/> | Analyst Cloud Security User    |



## 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:



| Action                              | Permission Set Label                          | Description   | License  |
|-------------------------------------|---|---|--|
| <input type="checkbox"/>            | B2B Buyer                                     | Allows access to the store. Lets users see products and categories, make purchases, and add products to their cart. | B2B Buyer Permission Set One Seat                      |
| <input type="checkbox"/>            | B2B Buyer Manager                             | Includes all B2B buyer capabilities, and allows access to manage carts and orders related to their account.         | B2B Buyer Manager Permission Set One Seat              |
| <input type="checkbox"/>            | CRM User                                      | Denotes that the user is a Sales Cloud or Service Cloud user.   | CRM User   |
| <input type="checkbox"/>            | Commerce Admin                                | Allow access to commerce admin features.  | Commerce Admin Permission Set License Seats            |
| <input type="checkbox"/>            | Contact Center Admin                          | Manage Service Cloud Voice contact centers that use Amazon Connect as a telephony provider.                         | Service Cloud Voice User                               |
| <input type="checkbox"/>            | Contact Center Agent                          | Access agent features in Service Cloud Voice contact centers that use Amazon Connect as a telephone provider.       | Service Cloud Voice User                               |
| <input type="checkbox"/>            | Contact Center Supervisor                     | Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect as a telephone provider.  | Service Cloud Voice User                               |
| <input checked="" type="checkbox"/> | Delhi Corp Experience Profile Manager         | Denotes that the user is a Sales Cloud user.  | Salesforce   |
| <input type="checkbox"/>            | Facility Manager                              | Lets users create, read, edit, and delete locations, publications, queued parties, and queues.                      | Facility Manager                                       |
| <input type="checkbox"/>            | Field Service Mobile User                     | Give your mobile workforce access to the Field Service mobile app. Set them up with the right User license.         | Field Service Mobile                                   |
| <input type="checkbox"/>            | Commerce Merchandise Manager                  | Allow access to commerce merchandising features.  | Commerce Merchandise User Permission Set License Seats |
| <input type="checkbox"/>            | Lightning Order Management Agent              | Read Access to all entities enabled by Order Management   | Lightning Order Management User                        |
| <input type="checkbox"/>            | Lightning Order Management Operations Manager | Access to all features enabled by Order Management  | Lightning Order Management User                        |
| <input type="checkbox"/>            | Lightning Order Management Shopper            | Limited access to Order Management features for Self Service  | Lightning Order Management User                        |
| <input type="checkbox"/>            | Lightning Order Management Store Associate    | Access to limited features enabled by Order Management  | Lightning Order Management User                        |
| <input type="checkbox"/>            | Queue Manager                                 | Lets users create, read, edit, and delete queued parties as well as read and update queues.                         | Queue Manager  |
| <input type="checkbox"/>            | Sales Cloud User                              | Denotes that the user is a Sales Cloud user.  | Sales User   |
| <input type="checkbox"/>            | Salesforce CMS Integration Admin              | Gives the admin data access and the permissions to integrate Salesforce CMS with any endpoint.                      | Cloud Integration User                                 |
| <input type="checkbox"/>            | Salesforce Console User                       | Enable Salesforce Console User  | Sales Console User                                     |
| <input type="checkbox"/>            | Security Center Integration User              | Access Security Center for Integration  | Cloud Integration User                                 |

The screenshot shows the 'Permission Sets' section of the Salesforce Setup. A new permission set is being created, named 'Users'. The 'Label' field contains 'Users' and the 'API Name' field contains 'User'. The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. Under 'Select the type of users who will use this permission set', there is a note about license assignment. A dropdown menu for 'License' is open, showing the option 'None'. Buttons for 'Save' and 'Cancel' are at the bottom.

The screenshot shows the 'Permission Set Overview' for the 'Users' permission set. It includes sections for 'Permission Set Overview' (Description: 'Users', License: 'None', Session Activation Required: checked), 'API Name: Users', 'Namespace Prefix: GOVTHAMA', and 'Created By: GOVTHAMA 09/04/2023, 10:05 pm'. The 'Apps' section lists various app permissions such as 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', 'Flow Access', 'Named Credential Access', 'Custom Permissions', and 'Custom Metadata Types'. A 'Learn More' link is also present.

Screenshot of the Salesforce Lightning interface showing the 'Permission Set' assignment screen for a user.

The URL in the browser is: governmentartsandscience-54e-dev-ed.lightning.force.com/lightning/setup/PermSets/OPS2w00000AMHBe/PermissionSetAssignment/home

The page title is: SETUP > PERMISSION SET 'USERS'

The sidebar navigation includes: Setup, Home, Object Manager, permission set, Users, Permission Set Groups, and Permission Sets.

The main content area displays a search bar and a 'Current Assignments' section. Below the assignments, there is a decorative illustration of a cactus, clouds, and a sun. A message states: "No assignments defined."

Screenshot of the Salesforce Lightning interface showing the 'Manage Assignment Expiration' screen for a user.

The URL in the browser is: governmentartsandscience-54e-dev-ed.lightning.force.com/lightning/setup/PermSets/OPS2w00000AMHBe/PermissionSetAssignment/new

The page title is: PERMISSION SET 'USERS' > MANAGE ASSIGNMENT EXPIRATION

The sidebar navigation includes: Setup, Home, Object Manager, permission set, Users, Permission Set Groups, and Permission Sets.

The main content area displays a search bar and a 'Select Users to Assign' section. It shows a 'Recently Viewed' dropdown and a list of users:

| Full Name | Title | Phone | Email                  |
|-----------|-------|-------|------------------------|
| GOWTHAM   |       |       | agowtham9344@gmail.com |
| GOWTHAM A |       |       | agowtham9344@gmail.com |

Buttons at the bottom include 'Cancel' and 'Next'.

The top screenshot shows the 'PERMISSION SET USERS > MANAGE ASSIGNMENT EXPIRATION' page. It displays a list of users assigned to a permission set, with options to select an expiration date (No expiration date or Specify the expiration date) and a time zone. The users listed are GOWTHAM A and GOWTHAM.

| Full Name | Role                 | Profile       | Active | User License | Expires On    |
|-----------|----------------------|---------------|--------|--------------|---------------|
| GOWTHAM A | System Administrator |               | ✓      | Salesforce   | Never Expires |
| GOWTHAM   | Channel Sales Team   | Standard User | ✓      | Salesforce   | Never Expires |

The bottom screenshot shows the 'Assignment Summary' page, which lists the successful assignment of permission sets to users. The status for both users is marked as 'Success'.

| Full Name | User License | Expires On | Time Zone | Status  |
|-----------|--------------|------------|-----------|---------|
| GOWTHAM A | Salesforce   |            |           | Success |
| GOWTHAM   | Salesforce   |            |           | Success |

## **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

## Activity 1:

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The top section, 'Default Organization-Wide Defaults', lists various object types with their default internal and external access levels. The 'Hide Details and Add Events' row is highlighted. The bottom section, 'Other Settings', contains several checkboxes for sharing-related features.

| Object                     | Default Internal Access     | Default External Access     | Grand 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 | ✓                              |
| Price Book                 | User                        | User                        | ✓                              |
| Product                    | Public Read/Write           | Public Read/Write           | ✓                              |
| Individual                 | Public Read/Write           | Private                     | ✓                              |
| Voice Call                 | Private                     | Private                     | ✓                              |
| Alternative Payment Method | Private                     | Private                     | ✓                              |
| Appointment Invitation     | Private                     | Private                     | ✓                              |

| Setting  | Description   |
|--|---|
| Standard Report Visibility                               | Check this box to enable standard report visibility for all users.          |
| Manual User Record Sharing                               | Check this box to enable manual user record sharing.                        |
| Manager Groups   | Check this box to enable manager groups.                                    |
| Secure guest user record access                          | Check this box to enable secure guest user record access.                   |
| Require permission to view record names in lookup fields | Check this box to require permission to view record names in lookup fields. |

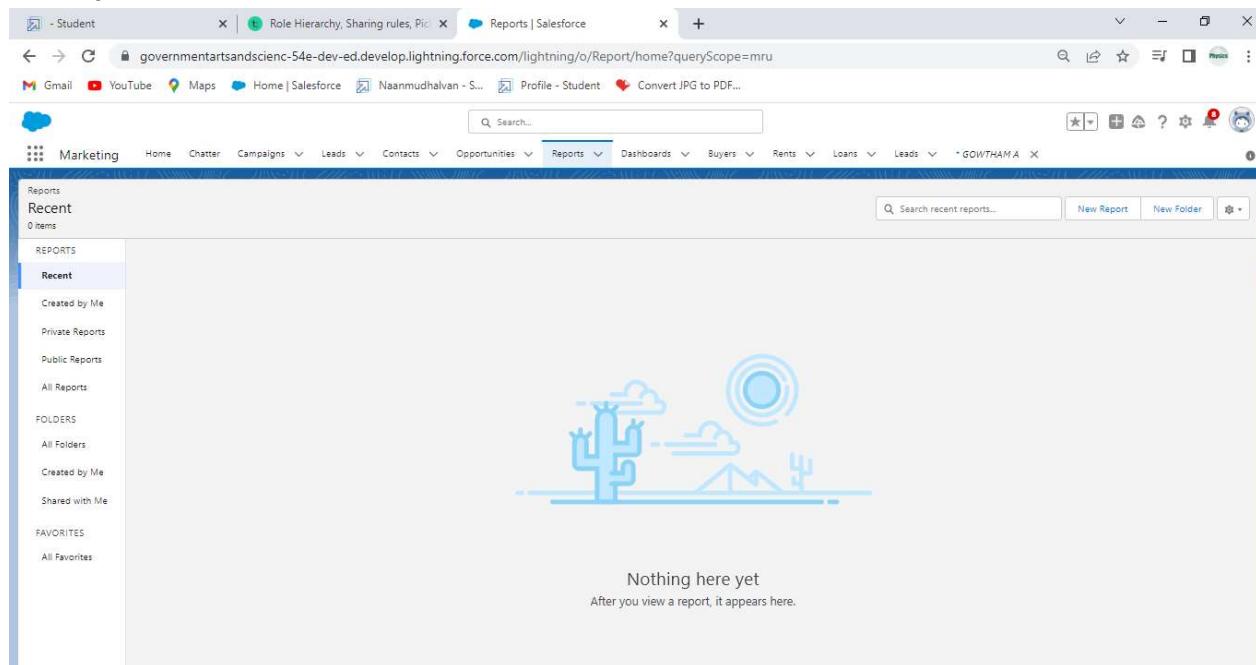
## **Milestone10-Report:**

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:**



Screenshot of the Salesforce Report Builder interface showing the "Create Report" modal open. The modal displays a list of report types under the "All" category, including Standard, Individual, and Custom options like File and Content Report, Individual History, Rents, Loans, Buyers, and Screen Flows.

The "Details" panel on the right shows the selected report type is "Leads" (Standard Report Type). It includes sections for "Created By You" (No Reports Yet), "Created By Others" (No Reports Yet), and "Objects Used in Report Type" (Owner, Lead, Role).

Screenshot of the Salesforce Report Builder interface showing a "New Leads Report" for the "Leads" object. The report outline includes a "Filters" section with a dropdown set to "Lead: Lead Name". The preview message indicates "Previewing a limited number of records. Run the report to see everything." Below the filters, it says "No records returned. Try editing report filters:" with links to "Show All leads." and "Edit other filters in the filter panel."

Screenshot of the Salesforce Report Builder interface showing the "Create Report" screen.

The "Category" sidebar shows "Recently Used" and "All" categories. The "Select a Report Type" section lists various report types under "Loans" (Standard Report Type), including File and Content Report, Individual, Rents, Loans, Buyers, and Screen Flows. The "Details" panel on the right shows the "Loans" report type selected, with sections for "Created By You" (No Reports Yet) and "Created By Others" (No Reports Yet). It also lists "Objects Used in Report Type": Owner, Loan, and Role.

Screenshot of the Salesforce Report Builder interface showing the "New Loans Report" configuration screen.

The left sidebar includes "Outline" and "Filters" (1). The "Groups" section has a "GROUP ROWS" button and an "Add group..." button. The "Columns" section has an "Add column..." button and a "Loan: Loan Name" field. The main area displays a preview message: "Previewing a limited number of records. Run the report to see everything." Below it, it says "No records returned. Try editing report filters:" with options to "Show All loans" or "Edit other filters in the filter panel." The top navigation bar includes Marketing, Home, Chatter, Campaigns, Leads, Contacts, Opportunities, Reports, Dashboards, Buyers, Rents, Loans, Leads, and a user profile for "GOWTHAM A". The toolbar includes Save & Run, Save, Close, and Run buttons.

Screenshot of the Salesforce Report Builder interface showing the "Create Report" modal.

The modal has three main sections:

- Category:** A sidebar listing recent categories like "Recently Used" and "All".
- Select a Report Type:** A grid of report types categorized by object (e.g., Standard, Collaboration, Content, Library, File, Individual, Rents, Loans) and type (e.g., Feed Posts, Report, User, History). "Buyers" is selected under "Buyers".
- Details:** A panel showing the selected report type ("Buyers Standard Report Type"), fields (11), and details about created by you and others, and objects used in the report type.

Screenshot of the Salesforce Report Builder interface showing the "New Buyers Report" configuration screen.

The screen includes:

- REPORT:** "New Buyers Report" (selected) and "Buyers".
- Outline:** Groups section with "GROUP ROWS" and "Add group..." button.
- Filters:** One filter named "Buy: Buy Name" is applied.
- Columns:** One column named "Buy: Buy Name" is selected.
- Preview:** A message indicates previewing a limited number of records. It shows no records returned and provides options to "Show All buyers" or "Edit other filters".
- Buttons:** "Add Chart", "Save & Run", "Save", "Close", and "Run".
- Other:** "Update Preview Automatically" checkbox.

Screenshot of the Salesforce Report Builder interface showing the creation of a new report.

**Create Report - Rents**

The "Create Report" dialog is open, showing the "Select a Report Type" section. A report named "Rents" (Standard Report Type) is selected. The "Details" panel shows the report's configuration, including fields used: Owner, Rent, and User.

| Report Type Name        | Category |
|-------------------------|----------|
| File and Content Report | Standard |
| Individual              | Standard |
| Rents                   | Standard |
| Loans                   | Standard |
| Buyers                  | Standard |
| Rents                   | Standard |
| Loans                   | Standard |
| Loans                   | Standard |
| Leads                   | Standard |
| Screen Flows            | Custom   |

**REPORT - New Rents Report**

The report preview shows a single record: "Rent: Rent Name". The preview message indicates that more records may be available after running the report.

Report details:

- Groups: GROUP ROWS
- Columns: Rent: Rent Name

Run buttons: Save & Run, Save, Close, Run

The screenshot shows the Salesforce Marketing Reports interface. The top navigation bar includes links for Home, Chatter, Campaigns, Leads, Contacts, Opportunities, Reports, Dashboards, Buyers, Rents, Loans, Leads, and a user profile for 'GOWTHAM A'. The main content area displays a table of recent reports:

| REPORTS | Report Name       | Description | Folder          | Created By | Created On          | Subscribed |
|---------|-------------------|-------------|-----------------|------------|---------------------|------------|
| Recent  | New Rents Report  |             | Private Reports | GOWTHAM A  | 10/4/2023, 12:04 pm |            |
|         | New Buyers Report |             | Private Reports | GOWTHAM A  | 10/4/2023, 12:02 pm |            |
|         | New Loans Report  |             | Private Reports | GOWTHAM A  | 10/4/2023, 12:01 pm |            |
|         | New Leads Report  |             | Private Reports | GOWTHAM A  | 10/4/2023, 11:57 am |            |

The left sidebar contains navigation links for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites).

## **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:**

Screenshot of the Salesforce Report Builder interface showing the "Create Report" screen.

The "Category" sidebar shows "Recently Used" and "All" sections. The "Report Type Name" table lists various report types under "Category".

A modal window titled "Details" is open for the "Accounts" report type, showing:

- Accounts**: Standard Report Type
- Start Report**
- Created By You**: No Reports Yet
- Created By Others**: No Reports Yet
- Objects Used in Report Type**: Role, Account, Operation Hours

Screenshot of the Salesforce Report Builder interface showing the "New Accounts Report" preview screen.

The "Fields" sidebar includes "Outline", "Filters", "Groups", "Columns", and various filters like Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date.

The main preview area shows a table of account data:

| Last Activity | Account Owner | Account Name                        | Billing State/Province | Type               | Rating | Last Modified Date |
|---------------|---------------|-------------------------------------|------------------------|--------------------|--------|--------------------|
| 1             | - GOWTHAM A   | Edge Communications                 | TX                     | Customer - Direct  | Hot    | 04/04/2023         |
| 2             | - GOWTHAM A   | Burlington Textiles Corp of America | NC                     | Customer - Direct  | Warm   | 04/04/2023         |
| 3             | - GOWTHAM A   | Pyramid Construction Inc            | -                      | Customer - Channel | -      | 04/04/2023         |
| 4             | - GOWTHAM A   | Dickenson plc                       | KS                     | Customer - Channel | -      | 04/04/2023         |
| 5             | - GOWTHAM A   | Grand Hotels & Resorts Ltd          | IL                     | Customer - Direct  | Warm   | 04/04/2023         |
| 6             | - GOWTHAM A   | Express Logistics and Transport     | OR                     | Customer - Channel | Cold   | 04/04/2023         |
| 7             | - GOWTHAM A   | University of Arizona               | AZ                     | Customer - Direct  | Warm   | 04/04/2023         |
| 8             | - GOWTHAM A   | United Oil & Gas Corp.              | NY                     | Customer - Direct  | Hot    | 04/04/2023         |
| 9             | - GOWTHAM A   | sForce                              | CA                     | -                  | -      | 04/04/2023         |
| 10            | - GOWTHAM A   | GenePoint                           | CA                     | Customer - Channel | Cold   | 04/04/2023         |
| 11            | - GOWTHAM A   | United Oil & Gas, UK                | UK                     | Customer - Direct  | -      | 04/04/2023         |
| 12            | - GOWTHAM A   | United Oil & Gas, Singapore         | Singapore              | Customer - Direct  | -      | 04/04/2023         |

Buttons at the top right include "Save & Run", "Save", "Close", and "Run".

Screenshot - Student | Role Hierarchy | Download file | Downloads | Screenshot | Dashboards | Screenshot | GOLDYGOWD | + | - | X

governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Marketing Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards Buyers Rents Loans Leads

Search...

No results

Items

Dashboards

View All

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Nothing here yet  
After you view a dashboard, it appears here.



Screenshot - Student | Role Hierarchy | Download file | Downloads | Screenshot | Dashboards | Screenshot | GOLDYGOWD | + | - | X

governmentartsandscienc-54e-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Gmail YouTube Maps Home | Salesforce Naanmudhalvan - S... Profile - Student Convert JPG to PDF...

Marketing Home Chatter Campaigns Leads Contacts Opportunities Reports Dashboards Buyers Rents Loans Leads

Search...

Dashboards

Recent

0 items

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

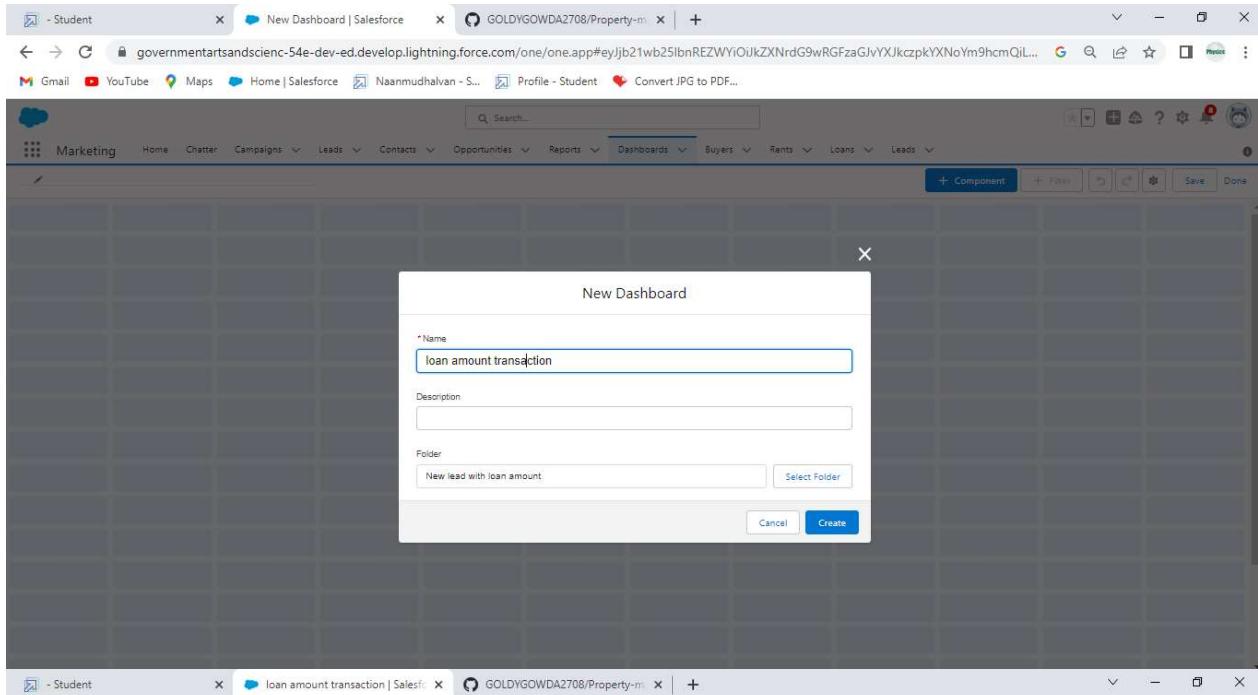
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FAVORITES

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Nothing here yet  
After you view a dashboard, it appears here.





The screenshot shows the Salesforce Lightning Experience with a dashboard titled "loan amount transaction". A report component titled "New Accounts Report" is displayed, showing a table of account data. The table includes columns for Last Act., Account#, Account Name, Billing State/C..., and Type. The data shows five accounts, all associated with "GOWTHA M A", with various names like "United Oil & Gas, Singapore", "United Oil & Gas, UK", "GenePoint", "aForce", and "United Oil & Gas Corp.", located in Singapore, UK, CA, and NY respectively, and categorized as Customer - Dir or Customer - Chi.

| Last Act. | Account#   | Account Name                | Billing State/C... | Type           |
|-----------|------------|-----------------------------|--------------------|----------------|
| -         | GOWTHA M A | United Oil & Gas, Singapore | Singapore          | Customer - Dir |
| -         | GOWTHA M A | United Oil & Gas, UK        | UK                 | Customer - Dir |
| -         | GOWTHA M A | GenePoint                   | CA                 | Customer - Chi |
| -         | GOWTHA M A | aForce                      | CA                 | -              |
| -         | GOWTHA M A | United Oil & Gas Corp.      | NY                 | Customer - Dir |

| Last Acti... | Account ...                 | Account Name | Billing State/Pr... | Type |
|--------------|-----------------------------|--------------|---------------------|------|
| - GOWTHAM A  | United Oli & Gas, Singapore | Singapore    | Customer - Dire     |      |
| - GOWTHAM A  | United Oli & Gas, UK        | UK           | Customer - Dire     |      |
| - GOWTHAM A  | GenePoint                   | CA           | Customer - Cha      |      |
| - GOWTHAM A  | sForce                      | CA           | -                   |      |
| - GOWTHAM A  | United Oli & Gas Corp.      | NY           | Customer - Dire     |      |

## Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/gowta19>

Team Member 1 –<https://trailblazer.me/id/vishnu075>

Team Member 2 –<https://trailblazer.me/id/dhevaraj04>

Team Member 3 –<https://trailblazer.me/id/aammu100>

## ADVANTAGES:

- Reduces add-ons
- Saves time
- Minimizes the administration costs
- Represents a centralized, efficient document platform
- Facilitates managing orders
- Allows creating user-tailored property management forms
- Saves money

- Provides insight into daily managerial tasks
- Provides real-time coordination between multiple users
- Facilitates delegating work and keeping up with the deadlines
- Notification and alert feature
- Improves communication between the employees and colleagues by introducing task discussions
- Facilitates the owner-tenant communication
- Decreases chances of misunderstanding and disputes
- Organizes your trust account audit data
- Automatizes daily operational workflow
- Automatizes finances and maintenance.

#### **DISADVANTAGE:**

Installation result from the inadequate use or picking the wrong system for your business. Those include: Time-consuming if you choose the wrong system. Make sure you analyze your own business, the scope of the projects you lead and work on and decide on the type of the property management system which will suit you the best. If you are running a small business, choosing a simple, user-friendly interface PMS is the best option.

Might seem expensive for a small business. However, the system will pay off within less than a year as it will literally start making money for you. The investment is worth the expense in the long run.

Training (cost and time). This depends on the readiness of your staff to learn. However, the software is user-friendly and everyone should be able to learn how to use it within a week.

#### **APPLICATIONS**

- Easy Maintenance monitoring
- Easy Payment form tenants and contractors
- Data tracking
- Property management
- 24\*7 Customer & Loyalty
- Quick inspections

- Tenant screening
- Enhances visibility
- Calender Scheduling
- Better Reporting

## **CONCLUSION**

In conclusion, Property Management System (PMS) software is very crucial for all the Hotels. Especially Opera PMS constitutes the most appropriate PMS software for Hilton Athens. It is user friendly, connects with Central Reservation System (CRS), Point of Sale (POS) etc. and provides all the tools the hotel needs in order to operate effectively. The disadvantages of the Opera PMS can be improved easily and as it was mentioned before a recommendation is the upgrade of Opera V5 to Opera 9.

## **FUTURE SCOPE**

Property management deals with the management of personal, commercial or industrial real estate. The growing population, overall economic growth of the country, rising income levels and increased foreign investment has led to a heightened need for improved infrastructure across urban, semi-urban and rural India.