



KNOWLEDGE
INSTITUTE OF TECHNOLOGY, SALEM



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An Autonomous Institution

EDUCATION ► EMPOWERMENT ► EXCELLENCE

NMS-PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

Team Members

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What is Salesforce ?

- Salesforce is a popular cloud-based customer relationship management (CRM) platform that helps businesses manage their relationships and interactions with customers and potential customers. It offers a wide range of tools and features for sales, marketing, customer service, and more.
- Salesforce allows businesses to store customer data, track leads and opportunities, automate various tasks, and provide a unified view of customer information to improve overall business efficiency and customer satisfaction. It is widely used across various industries to streamline processes and enhance customer engagement.

Property Management App

- Buyer can order his Requirements and get the Appropriate Details of the Property.
- According to his interest just provide him with some discounts up to 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 the user can get it and also the clear reports and dashboards are visualized.
- This project has **14 milestones** to successfully complete the Property Management app.

1. Creation of Developer Account

- A Developer org has all the features and licenses you need to get started with Salesforce.1.Search developer.salesforce.com/signup

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools.
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

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Role* Developer

Company* Knowledge Institute of Technology

Sign me Up

Already have a Salesforce Developer Environment?
Log In

2. Object Creation

What is an Object?

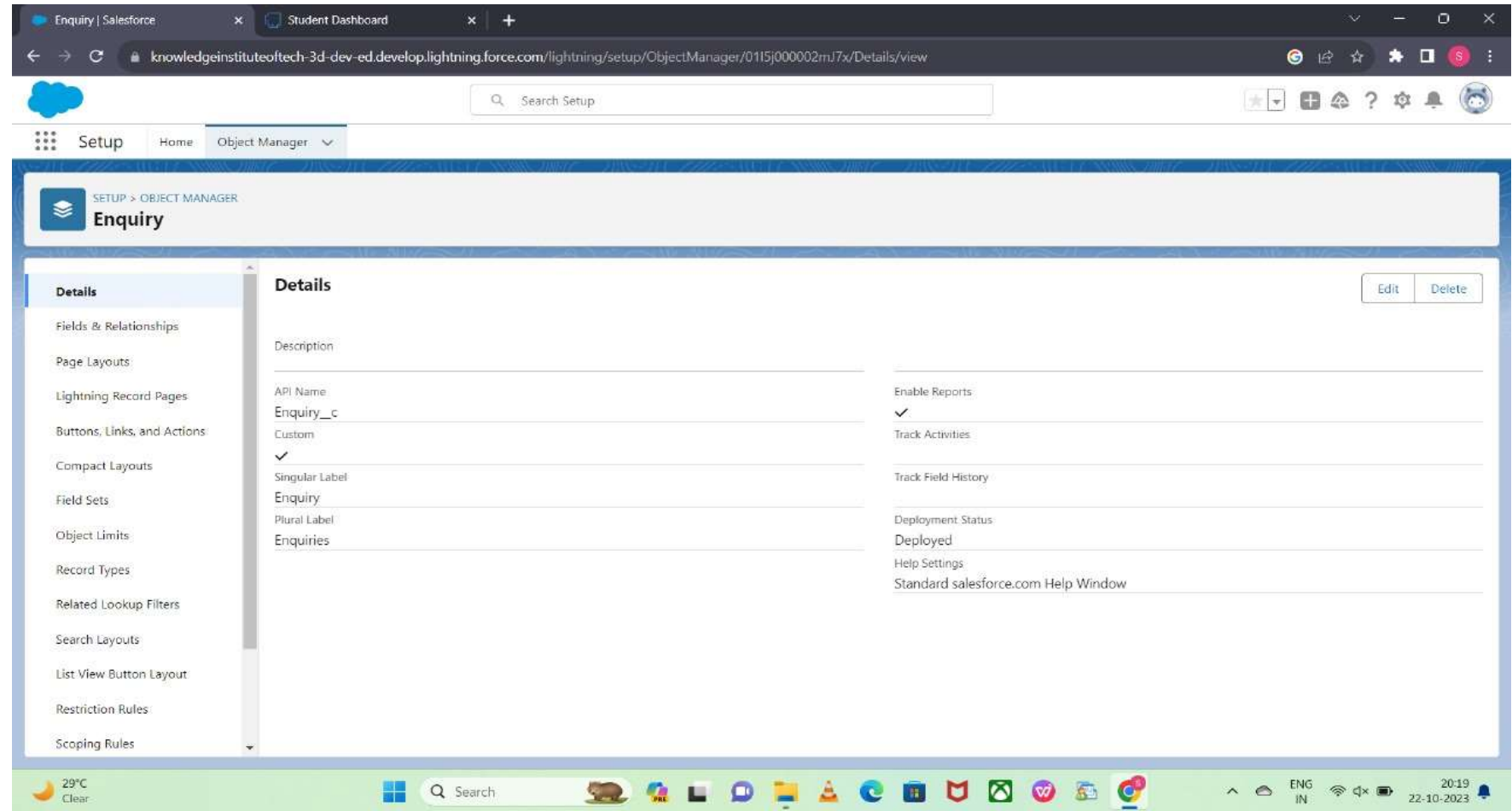
In Salesforce, an object is a data structure representing a table storing specific information, comprising fields and records, crucial for efficient data management and organization.

Two Types

- Standard Objects: - Predefined entities like Accounts and Contacts in Salesforce, catering to common business needs without extensive customization.
- Custom Objects: - User-defined entities allowing businesses to create tailored data structures, enabling unique data storage and specialized application development.

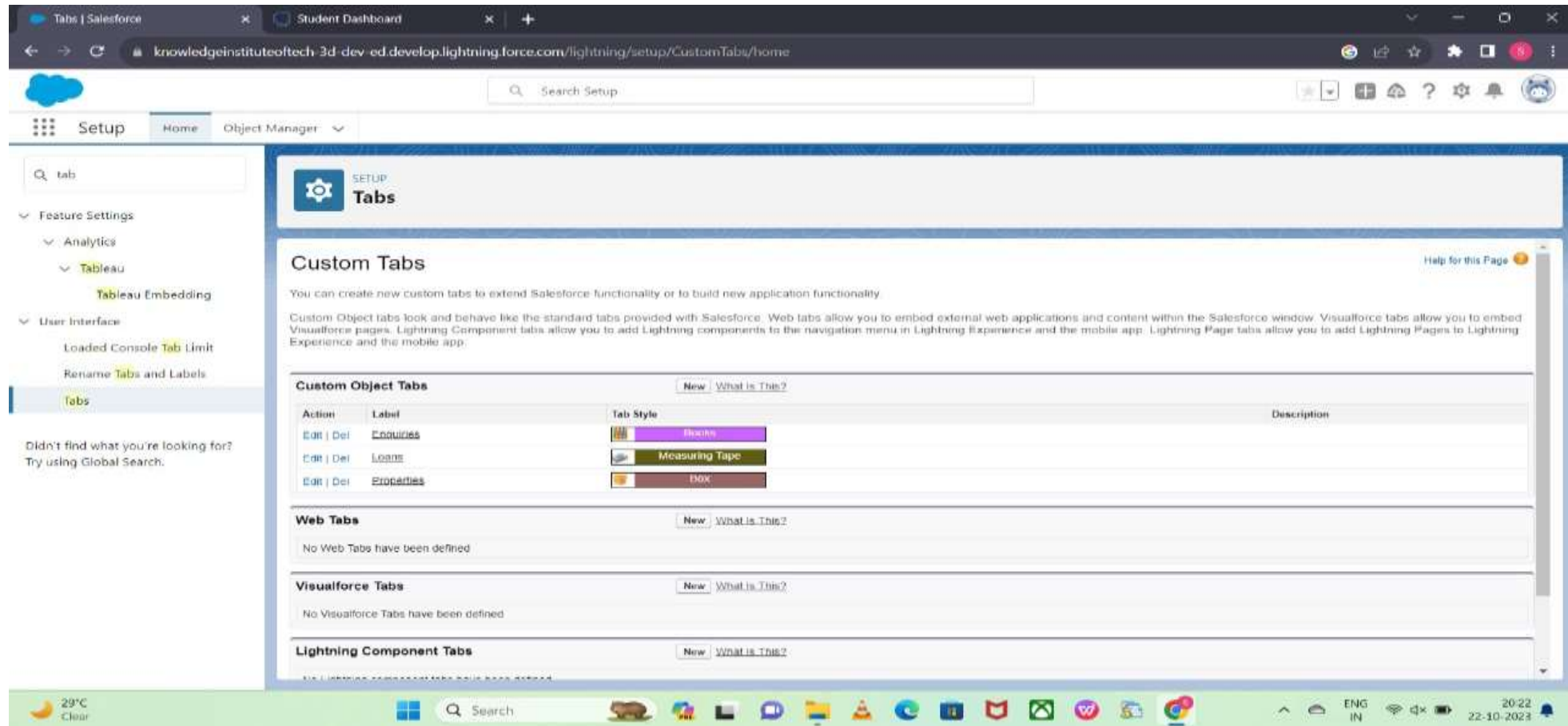
In this Application we use some Custom Objects

- Enquiry
- Property
- Loan
- Reports
- Dashboards



3. Tabs Creation

Tabs in Salesforce are sections for navigation, providing access to data and functions. They organize standard, custom objects, Visualforce, Lightning components, and web pages.



The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with 'tab' entered and a navigation menu with categories like Feature Settings, Analytics, and User Interface. The 'Tabs' option under User Interface is selected. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is an introductory text and a table for 'Custom Object Tabs'. The table has columns for Action, Label, Tab Style, and Description. It lists three tabs: 'Enquiries' (Bookmarks style), 'Leads' (Measuring Tape style), and 'Properties' (Box style). Below the table, there are sections for 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', each with a 'New' button and a 'What is This?' link. The bottom of the screen shows a Windows taskbar with various application icons and a system tray with weather, search, and date information.

Setup | Home | Object Manager

Search Setup

tab

Feature Settings

Analytics

Tableau

Tableau Embedding

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

SETUP
Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Enquiries	Bookmarks	
Edit Del	Leads	Measuring Tape	
Edit Del	Properties	Box	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

No Lightning Component Tabs have been defined

29°C Clear

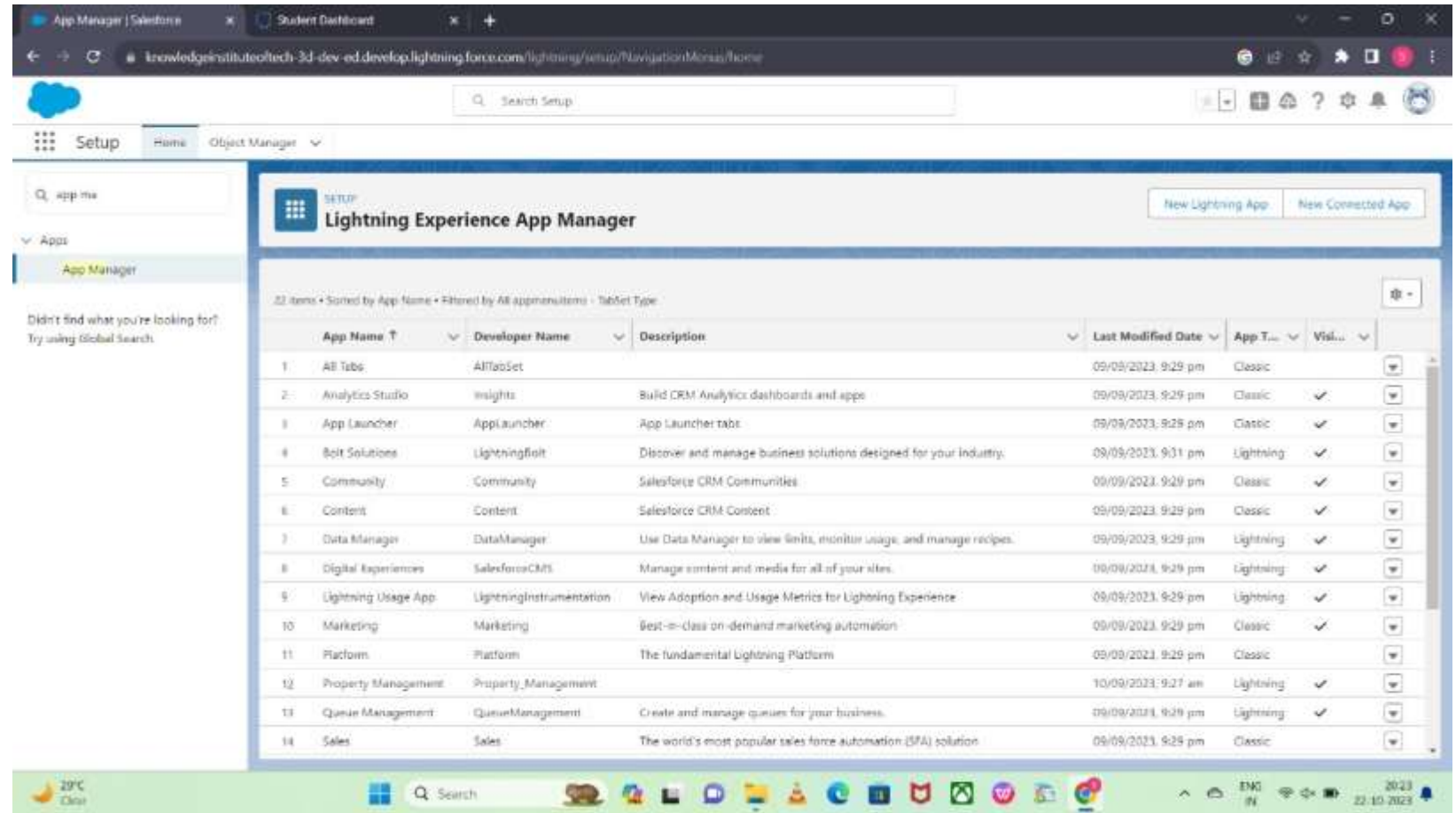
Search

ENG IN

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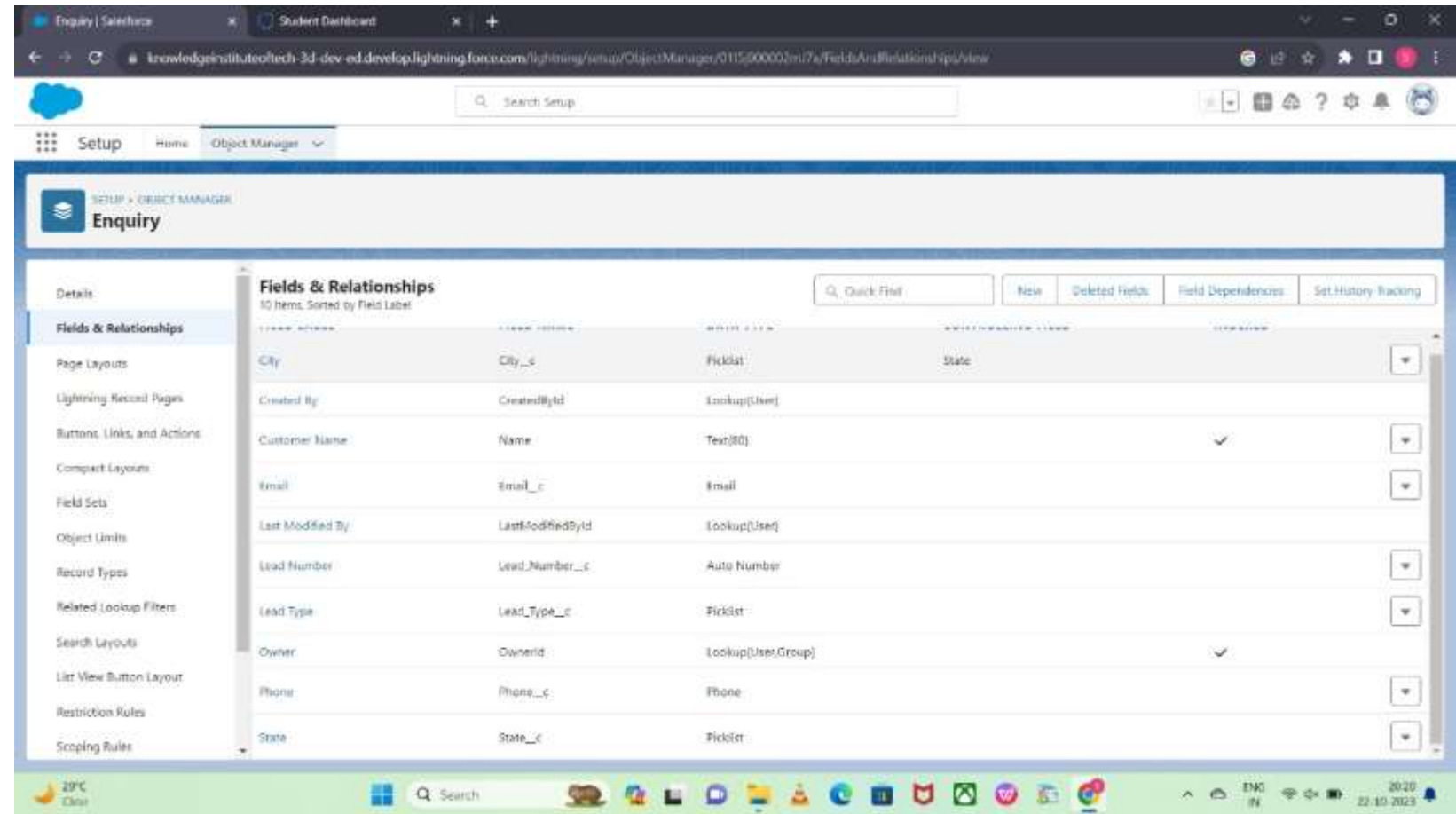
4. Create App

- Salesforce offers standard (Sales Cloud), custom, and third-party apps through AppExchange.
- These include mobile, community, and integration apps, empowering businesses with versatile solutions for CRM, collaboration, and efficiency.



5. Fields & Relationships

- Salesforce fields store diverse data types: text, numbers, dates, picklists, checkboxes, formulas, lookups, and more.
- They organize information within records, crucial for efficient CRM management.

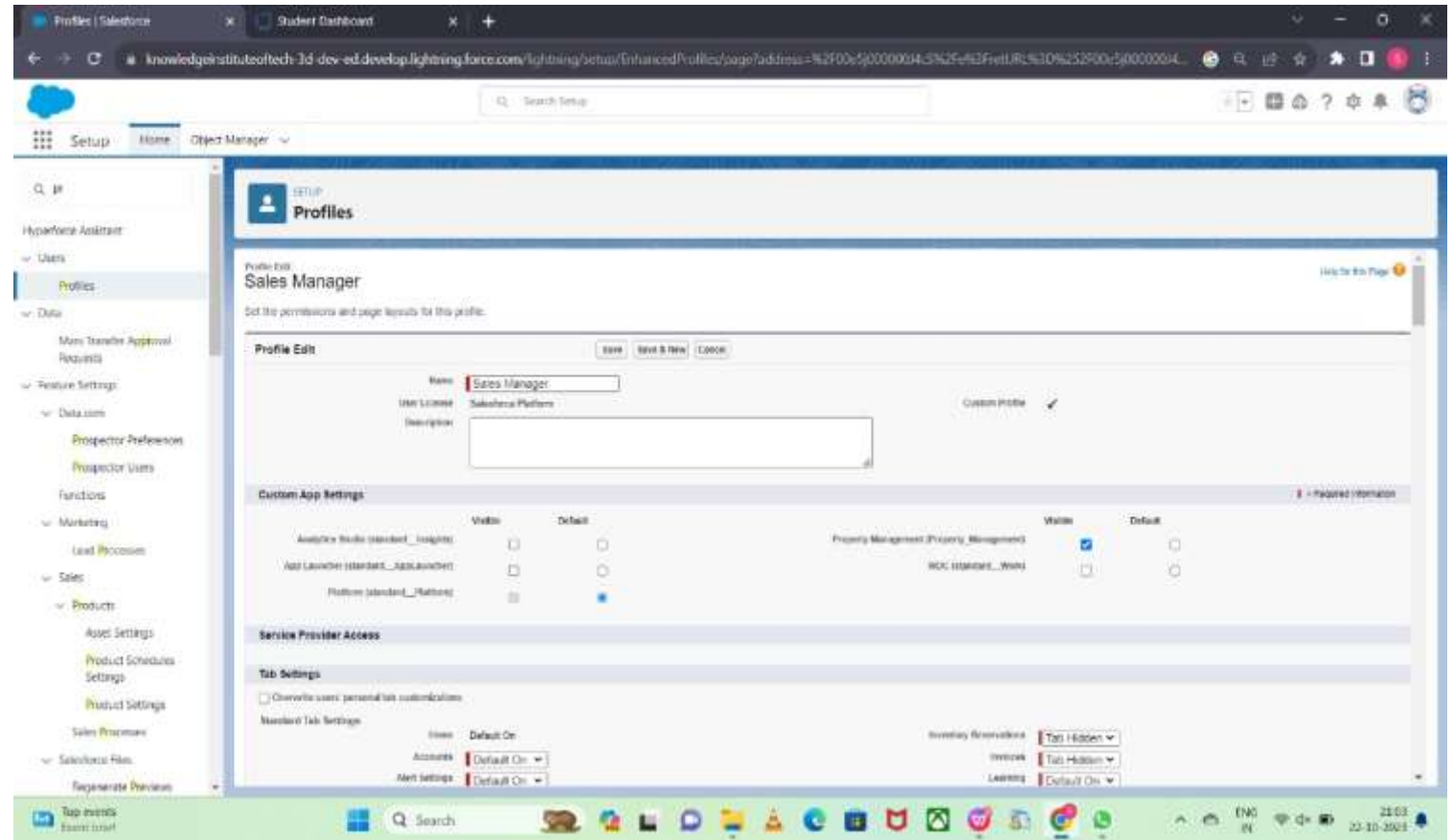


6. Record Types

- Record types in Salesforce enable customized user experiences.
- They define distinct page layouts, picklist values, and business processes based on user profiles.
- By assigning different record types to records, organizations can streamline data entry, ensuring relevant information is captured for various contexts.
- This flexibility enhances user efficiency and allows businesses to adapt Salesforce to their specific needs, optimizing workflow and data management across diverse teams and processes.

7. Profile

- Salesforce profiles manage user permissions, controlling access to objects, fields, and record actions.
- They're crucial for data security and maintaining organization-specific data integrity and functionality.



8. User Adoption

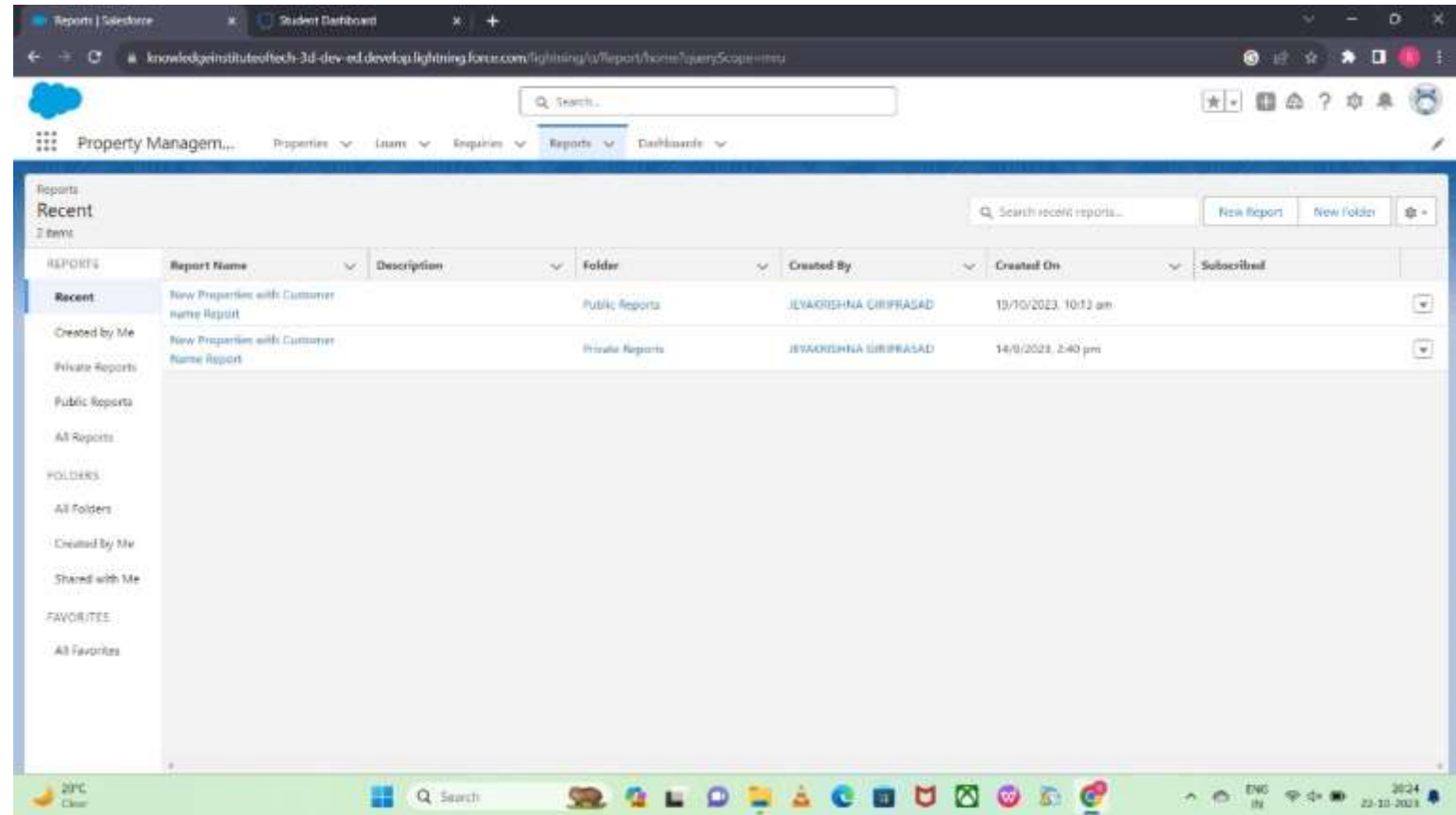
- User adoption in Salesforce refers to the extent to which employees effectively use Salesforce within an organization.
- It's crucial for maximizing the benefits of the platform.
- Successful adoption involves comprehensive training, intuitive design, clear communication of its benefits, and addressing user concerns.
- Regular feedback, support, and ongoing training can further enhance adoption rates among users.

9. Organization Wide Default (OWD)

- OWD refers to the baseline level of access that all users in an organization have to records, regardless of the ownership or sharing settings. OWD settings determine the default level of access for objects in Salesforce, such as Accounts, Contacts, Opportunities, etc.
- There are three main OWD options:
 1. Private: In this setting, only the record owner and users above them in the role hierarchy can access the record.
 2. Public Read-Only: All users can view the records, but only the owner and users above them in the hierarchy can edit.
 3. Public Read/Write: All users can view and edit the records.

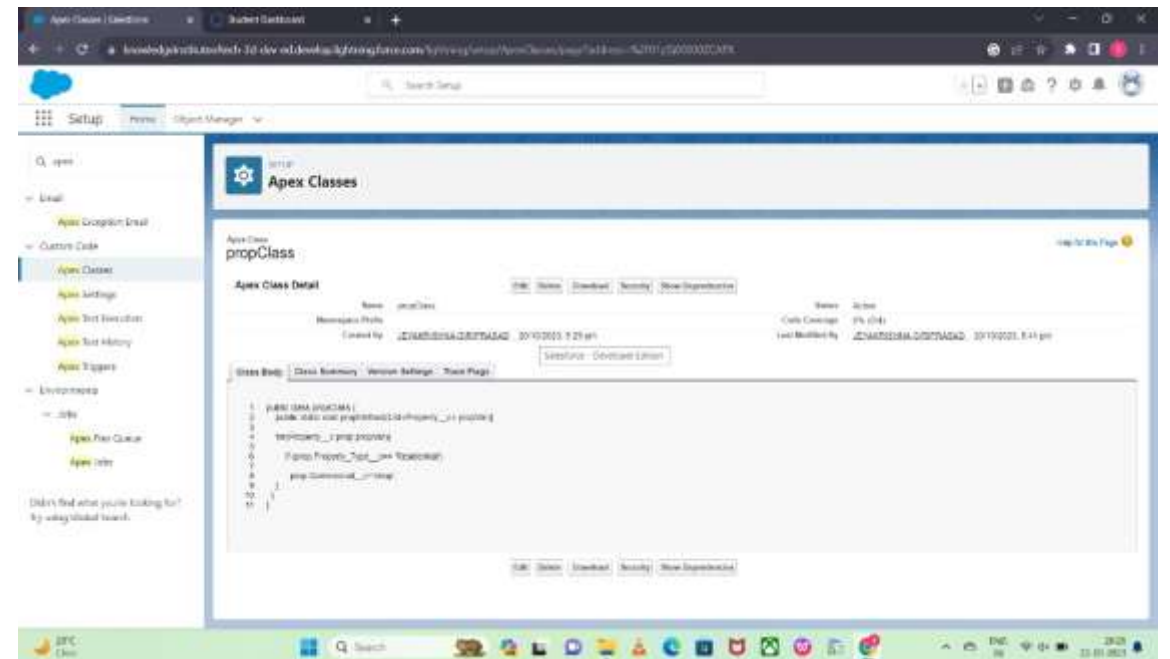
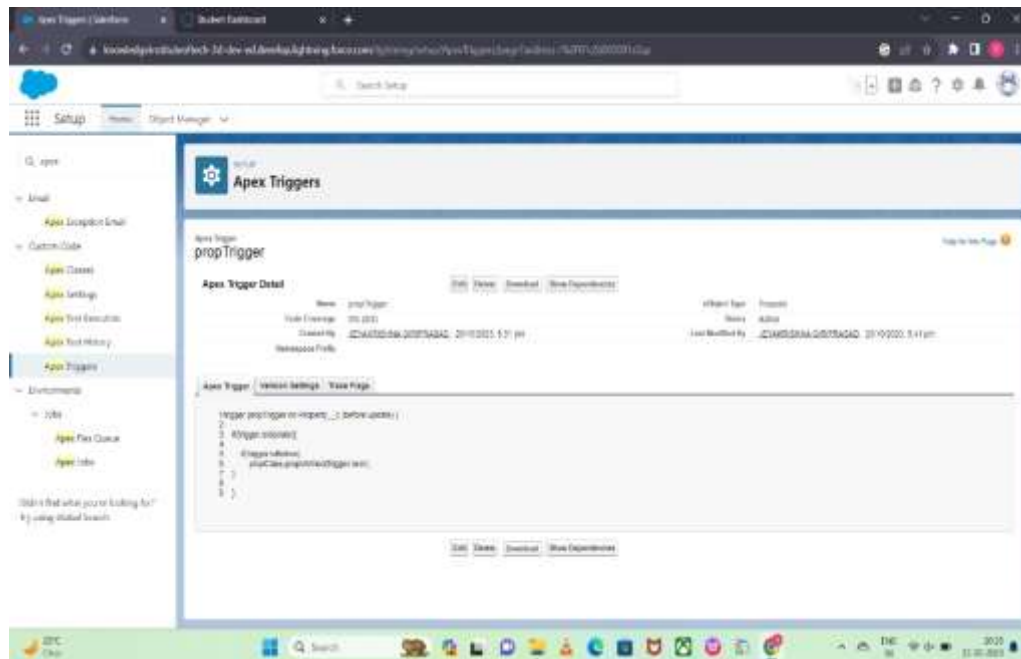
10. Reports

- Salesforce reports analyze data with customizable formats, filters, and charts.
- Users create insightful reports and dashboards, enabling informed decisions and enhancing overall organizational efficiency.

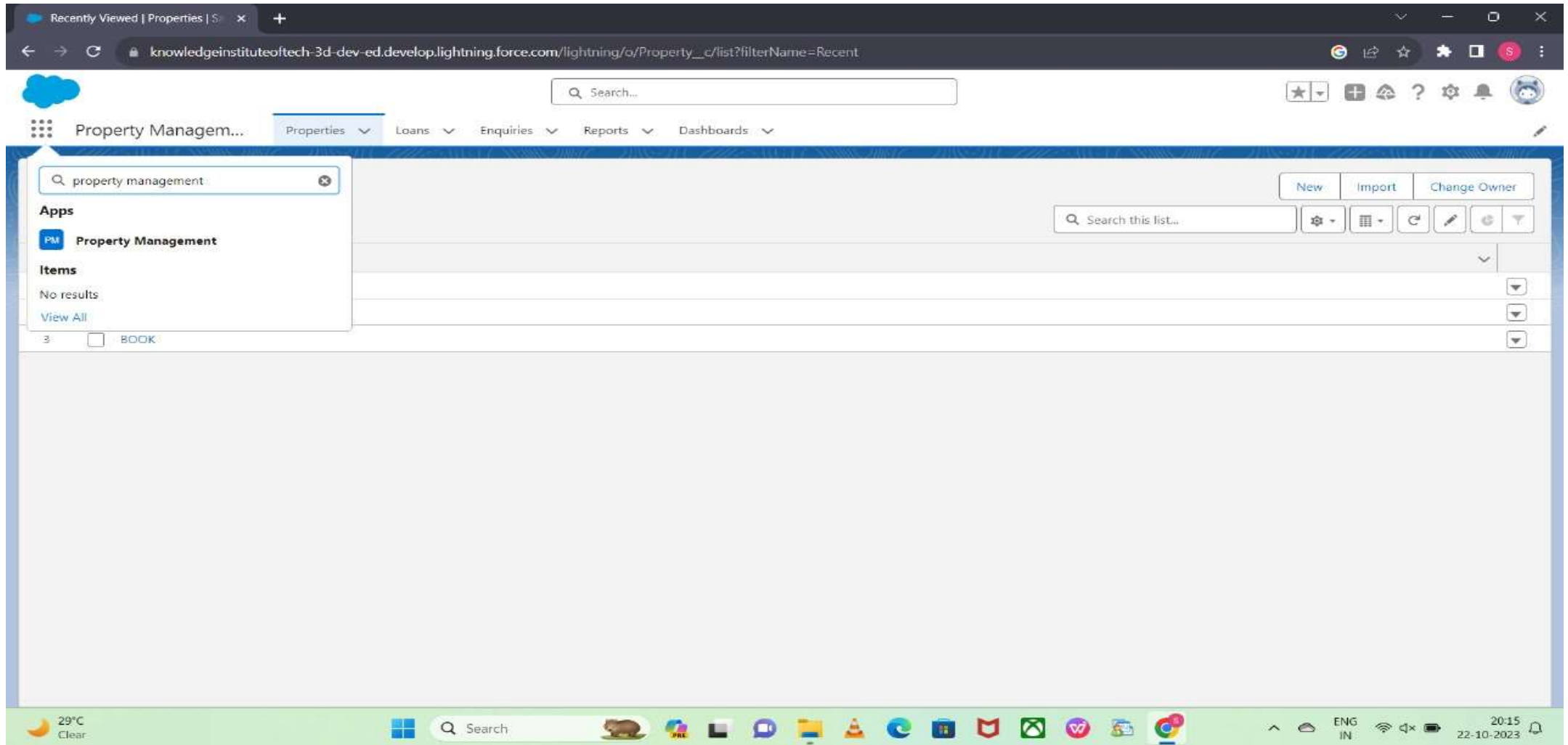


11. Apex Triggers

- Apex triggers in Salesforce execute custom code before/after events like record insertion, updating. They handle bulk operations, enforce rules, and ensure data integrity efficiently.



App Launcher



THANK YOU