



PROPERTY MANAGEMENT APPLICATION USING SALESFORCE



SALESFORCE NAAN MUDHALVAN PROJECT REPORT

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TECHNOLOGY,**

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BONAFIDE CERTIFICATE

Certified that this project report titled **“PROPERTY MANAGEMENT APPLICATION USING SALESFORCE”** is the Bonafide work of **“JEYAKRISHNA G (611220244015), PRASANTH R (611220244029), MADHAVAN S V (611220244023), SHANKAR M (611220244302)”** who carried out the project work under my supervision.

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ACKNOWLEDGEMENT

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At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr. C. Balakrishnan**, who has provided all the facilities to us.

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1.INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration. Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small start-up or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to your specific project goals.

2.PROJECT SPECIFICATIONS

2.1 Project Goal

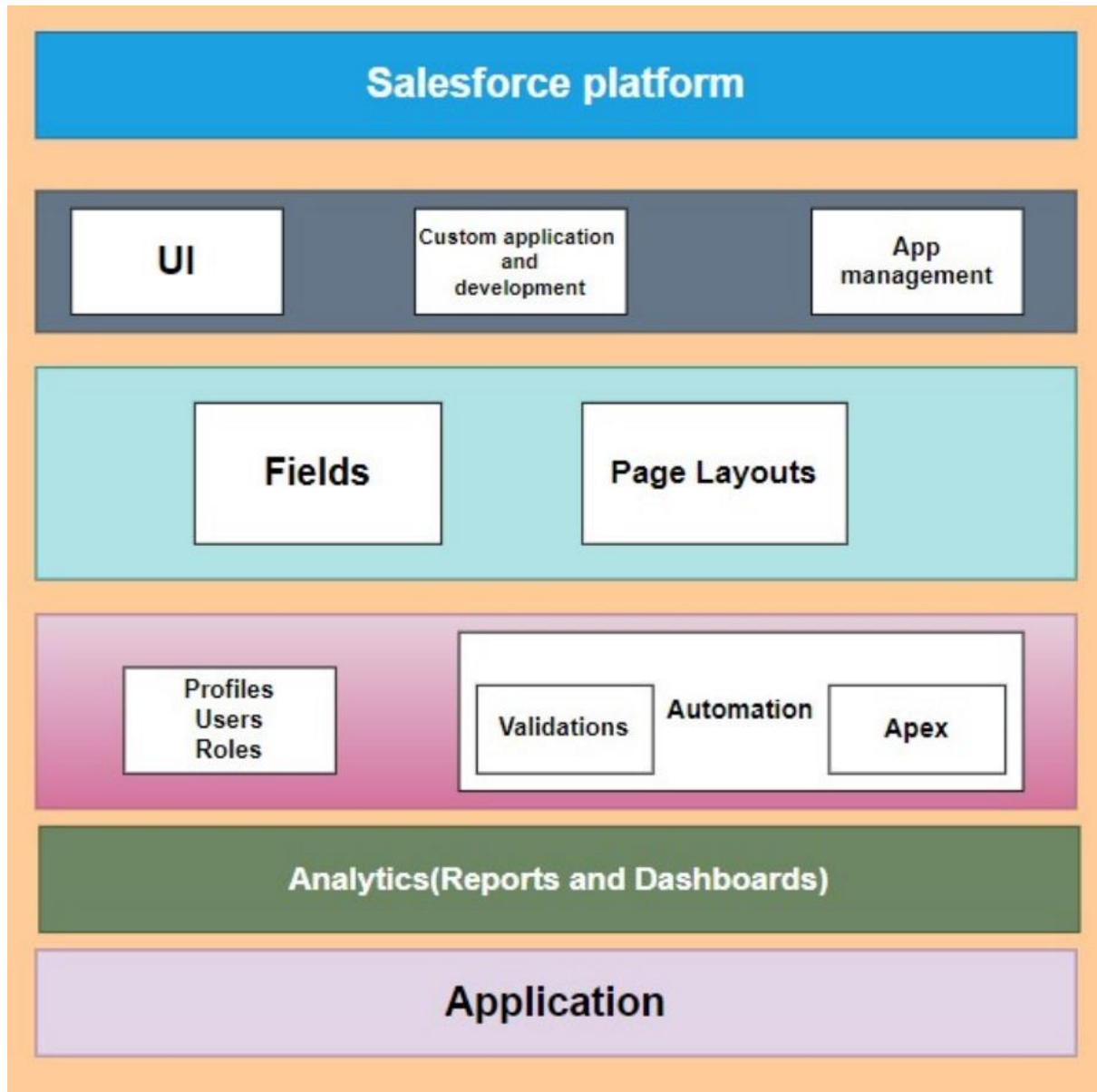
The goal of this project is to create a CRM (Customer Relationship Management) application to develop the Property Management where Buyer can order his Requirements and get the appropriate details of the Property. According to his interest just provide him with some discounts up to what extent he can 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. Provide the Security for two different profiles like for marketing and sales team. Then finally create the reports and dashboard so there will be a clear view just get the reports on the count of loan passed getting the property purchased close to the deal.

2.2 Project Scope

- **Creation of Developer Account (Milestone 1):** This involves setting up a developer account on the Salesforce platform, which will serve as the foundation for building the CRM application.
- **Object Creation (Milestone 2):** Custom objects and relationships will be defined to efficiently store and manage data related to property, enquiry, loan and other relevant information.
- **Tabs Creation (Milestone 3):** Tabs will be configured to provide user-friendly access to different sections and functionalities within the CRM application.
- **Create App (Milestone 4):** The CRM application will be created, and it will serve as the central hub for managing property related features and accessing all relevant details.
- **Fields & Relationships (Milestone 5):** Custom fields and relationships will be established to capture specific data attributes related to enquires along with its properties.

- **Page layout and Record type:** Used in conjunction with one another to customise the views of different types of users with the custom objects.
- **Profile:** User profiles will be configured to define access permissions and roles within the application.
- **Users (Milestone 8):** User management will involve adding and configuring user accounts, specifying their roles and access levels.
- **Permission Set:** Sharing rules will be defined to ensure that users can appropriately share and access data based on predefined criteria.
- **Set up for OWD (Milestone 10):** Determines the default baseline level of access for all records of an object and secures the data through the access levels.
- **Reports (Milestone 11):** Custom reports will be created to track and analyse property and its enquires data, providing valuable insights for users.
- **Dashboards (Milestone 12):** Dashboards will be designed to display key performance indicators and visual summaries of application data.
- **Flows:** A tool that automates complex business processes. Flow builder in this application is used to automate the work process alert message to the loan buyer with the interval of certain periods.
- **Apex Triggers:** Enables you to perform custom actions before or after events to records, such as creation, insertion, deletion.

2.3 Technical Requirements



2.4 Functional Requirements

- **User Authentication:** Users should be able to log in securely using their Salesforce credentials. Role-based access control to restrict access based on user roles (e.g., property manager, tenant, maintenance staff).
- **Property Listing:** Ability to add, edit, and delete property listings with details like property type, location, photos, and pricing. Support for uploading property documents, such as lease agreements and inspection reports.
- **Tenant Management:** Record tenant information, including contact details, lease agreements, and rent payment history. Automate rent payment reminders and overdue notifications. Manage tenant requests and maintenance issues.
- **Maintenance Requests:** Tenants should be able to submit maintenance requests with details and images. Assign and track maintenance tasks to maintenance staff. Schedule maintenance appointments and send notifications to tenants and staff.
- **Financial Management:** Track rent payments, generate invoices, and record expenses. Provide financial reports, such as profit and loss statements and rent roll reports. Integration with payment gateways for rent collection.
- **Communication:** Messaging and communication channels for tenants, property managers, and maintenance staff. Send notifications, announcements, and updates to relevant parties.
- **Document Management:** Store and organize property-related documents securely. Support for e-signatures on lease agreements and other documents.
- **Reporting and Analytics:** Generate reports on property occupancy, financial performance, maintenance history, and more. Dashboard with visual analytics for at-a-glance insights.
- **Integration:** Integration with property listing websites for easy publishing of properties. Integration with accounting software for financial management. Integration with maintenance management tools.

3.PREPARATION DATA MODELING

Objects:

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2.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.

In This Application We Use 3 Custom Objects:

- 1.Enquiry
- 2.Property
- 3.Loan

1)Create A Custom Object for Enquiry:

1. To Navigate to Setup page

To create an object:

From the setup page? Click on Object Manager? Click on Create? Click on Custom Object.

2. On Custom object defining page:

Enter the label name (lead), plural label name?, Record name(Customer Name)

3. Click on Allow reports, Allow search?
4. Save

Setup > OBJECT MANAGER
Enquiry

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

Edit Custom Object
Enquiry

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information ! = Required information

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

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

Object Name: Example: Account

Description:

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

Content Name:

Enter Record Name Label and Format

Setup > OBJECT MANAGER
Enquiry

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

Enter Record Name Label and Format

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

Record Name: Example: Account Name

Data Type:

Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status [What is this?](#)

- ☐ In Development
- ☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

- ☒ Allow Search

[Save] [Save & New] [Cancel]

2) Creation of Property Object

- 1) To create an object:
- 2) From the setup page ? Click on Object Manager ? Click on Create Custom Object.
- 3) Enter the label name? **Property**
- 4) Plural label name? **Properties**
- 5) Record Name? Property Name
- 6) click on Allow reports,
- 7) Allow search ?
- 8) Save

Setup > OBJECT MANAGER
Property

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

Custom Object Definition Edit

Custom Object Information

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

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

Object Name: Example: Account

Description:

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

Content Name:

Enter Record Name Label and Format

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

Record Name: Example: Account Name

Data Type:

Setup > OBJECT MANAGER
Property

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

Enter Record Name Label and Format

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

Record Name: Example: Account Name

Data Type:

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [x](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Streaming

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

☐ In Development

☒ Deployed [What is this?](#)

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☒ Allow Search

3)Creation of Loan Object

- 1.To create an object:
 - 2.From the setup page ? Click on Object Manager? Click on Create? Click on Custom Object.
 - 3.Enter the label name? Loan
 - 4.Plural label name? Loans
 - 5.Record Name? Loan Id
 - 6.Data Type? Auto Number
 - 7.Display Format? LN-{0000}
 - 8.Starting Number?0001
 - 9.click on Allow reports,
 - 10.Allow search?
- Save

[Setup](#)
[Home](#)
[Object Manager](#)

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](#)

Edit Custom Object

Loan

Help for this Page

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label

Loan

Example: Account

Plural Label

Loans

Example: Accounts

Starts with vowel sound

☐

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

Object Name

Loan

Example: Account

Description

Context-Sensitive Help Setting

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

Content Name

None

Enter Record Name Label and Format

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

Record Name

Loan Id

Example: Account Name

Data Type

Auto Number

[Setup](#)
[Home](#)
[Object Manager](#)

SETUP > OBJECT MANAGER

Loan

Details

[Fields & Relationships](#)
[Page Layouts](#)
[Lightning Record Pages](#)
[Buttons, Links, and Actions](#)
[Compact Layouts](#)
[Field Sets](#)
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[Search Layouts](#)
[List View Button Layout](#)
[Restriction Rules](#)
[Scoping Rules](#)
[Triggers](#)
[Flow Triggers](#)

Enter Record Name Label and Format

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

Record Name

Loan Id

Example: Account Name

Data Type

Auto Number

Display Format

LN-0000

Example: A-0000 What is This?

Optional Features

☒ Allow Reports
 ☐ Allow Activities
 ☐ Track Field History
 ☐ Allow in Chatter Groups
 ☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing
 ☒ Allow Bulk API Access
 ☒ Allow Streaming API Access

Deployment Status

☐ In Development
 ☒ Deployed

[What is this?](#)

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

Save Save & New Cancel

9

Tabs:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

1. Standard Object Tabs: Standard object tabs display data related to standard objects.

2. Custom Object Tabs: Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.

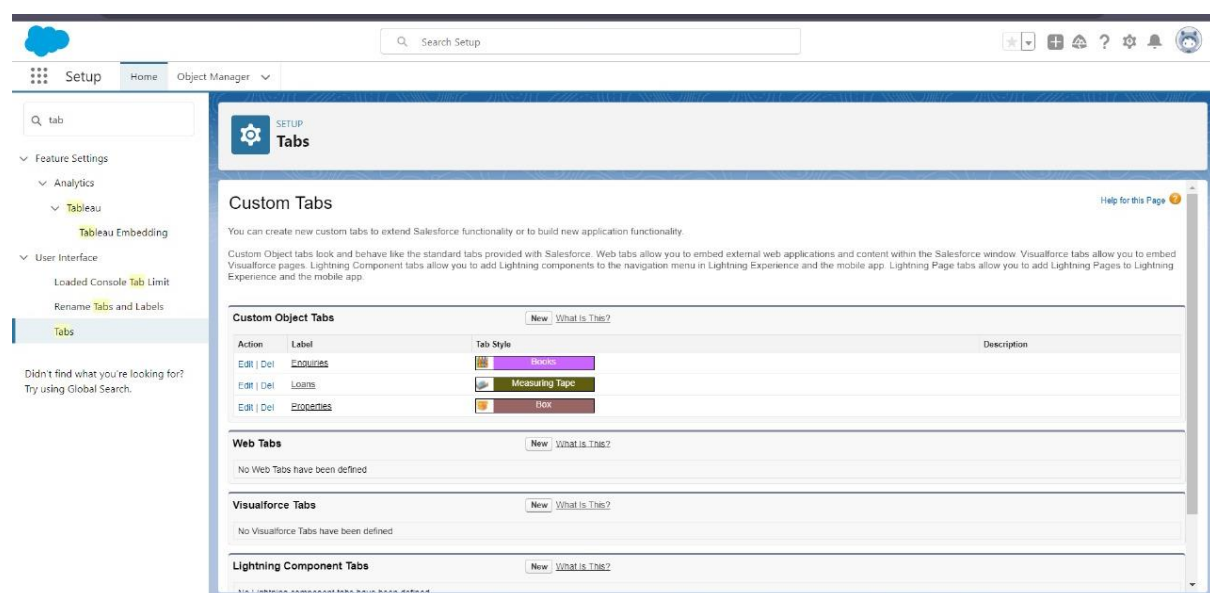
3. Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tab.

4. Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

1) Creation of Property Tab

1) Go to setup page? type Tabs in Quick Find bar? click on tabs? New (under custom object tab)

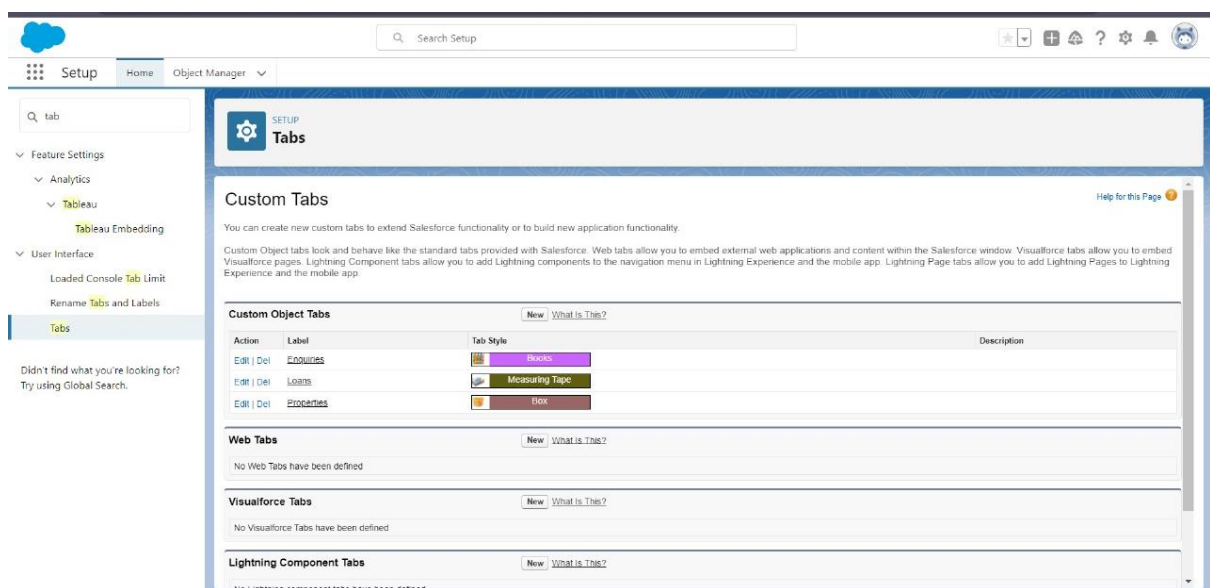
2) Select Object(Property)? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save



2)Creation of Loan Tab

1)Go to setup page? type Tabs in Quick Find bar click on tabs? New (under custom object tab)

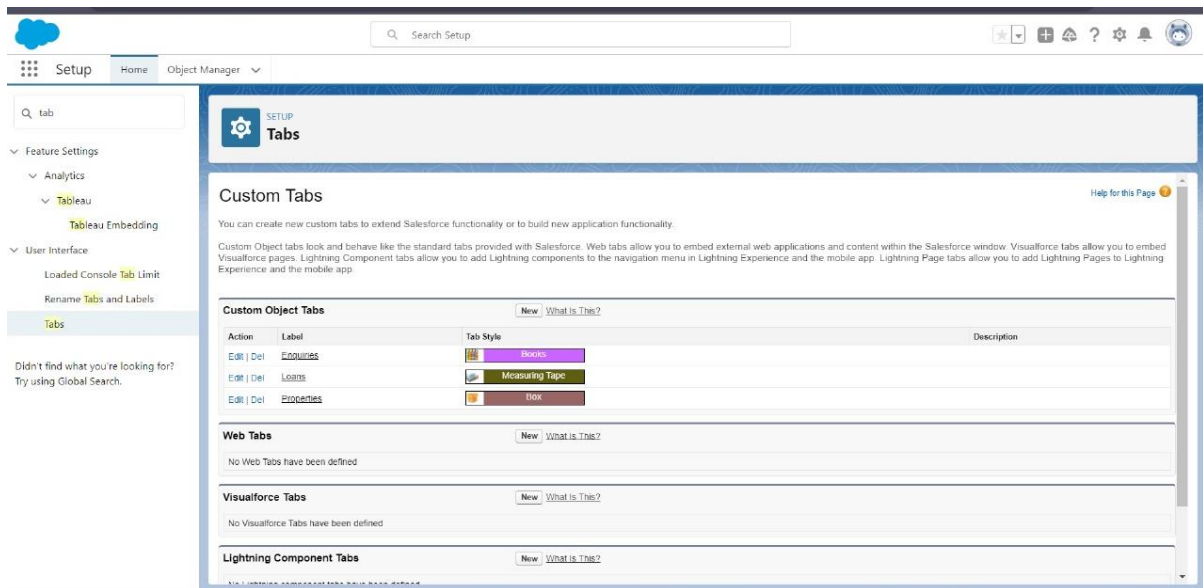
2)Select Object(Buy)? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save



3)Creation of Enquiry Tab

1)Go to setup page? type Tabs in Quick find bar? click on tabs? New (under custom object tab)

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



Lightning App:

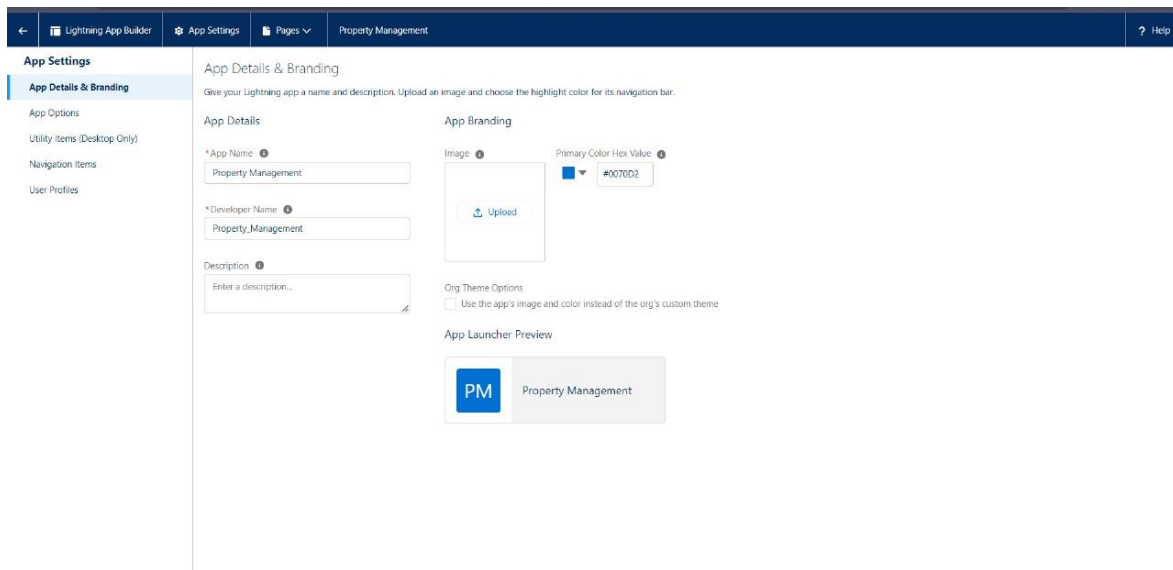
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Centre, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.

Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

1. Click New Lightning App. Property Management as the App Name, then click Next

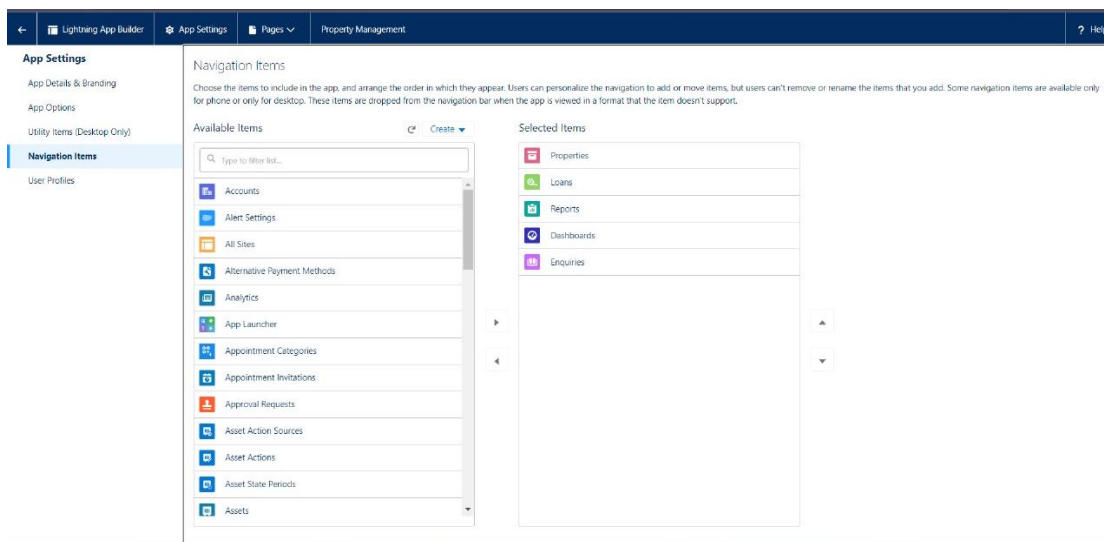


2. Under App Options, leave the default selections and click Next.

3. Under Utility Items (Desktop Only), leave as is and click Next.

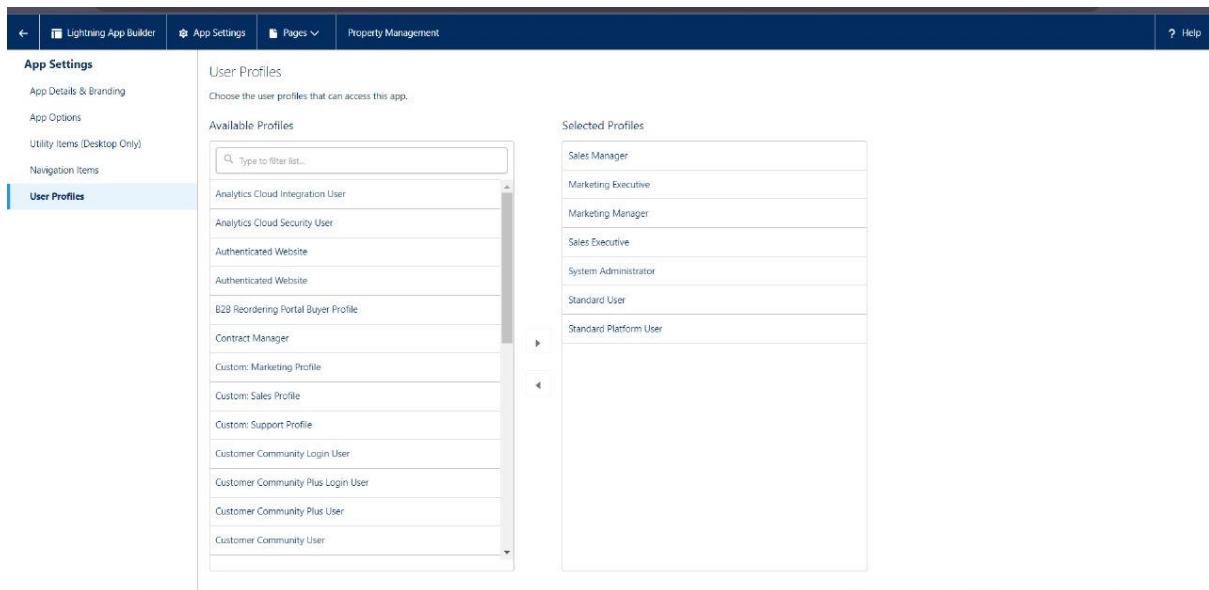
4) To Add Navigation Items:

(enquiries, Property, Loan, Report, Dashboard) Select the items from the search bar and move it using the arrow button ? Next.



5. To Add User Profiles:

(System Administrator, Salesforce platform user, Standard User) Search profiles in search bar ? click on the arrow button ? save & finish.



6. To verify your changes, click the App Launcher, type Property Management and select the Property Management app.

Fields and Relationship:

Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

1) Creation of Fields for The Enquiry Objects

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

2. Now click on “Fields & Relationships”? New. Select Datatype (Auto number)

3. Fill the field label name Lead Number, Datatype (autonumber)? Next? Next? Save.

Create the remaining Fields:

Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for Below Fields

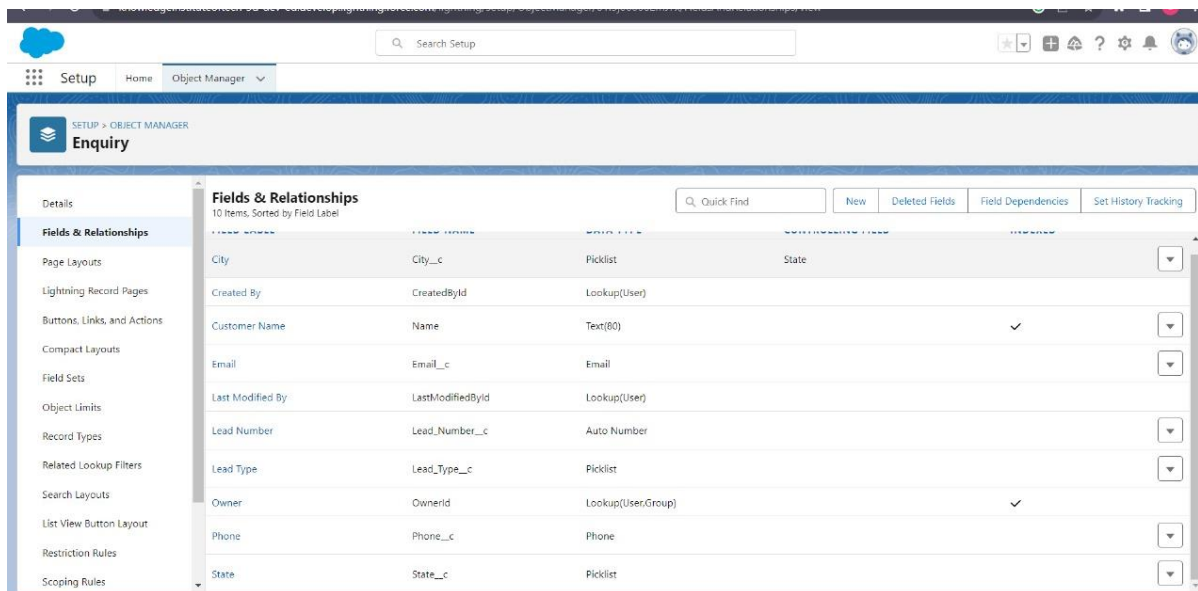
Lead Type: Create the picklist fields by the values (Buy, Rent) State:

Create the Picklist Fields (Maharashtra, Gujarat, Rajasthan) City:

Create the Picklist Fields (Nashik, Surat, Jaipur)

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

Phone: Select the Field Data type as (Phone)



2)Creation of Fields for The Property Objects

Create the remaining Fields:

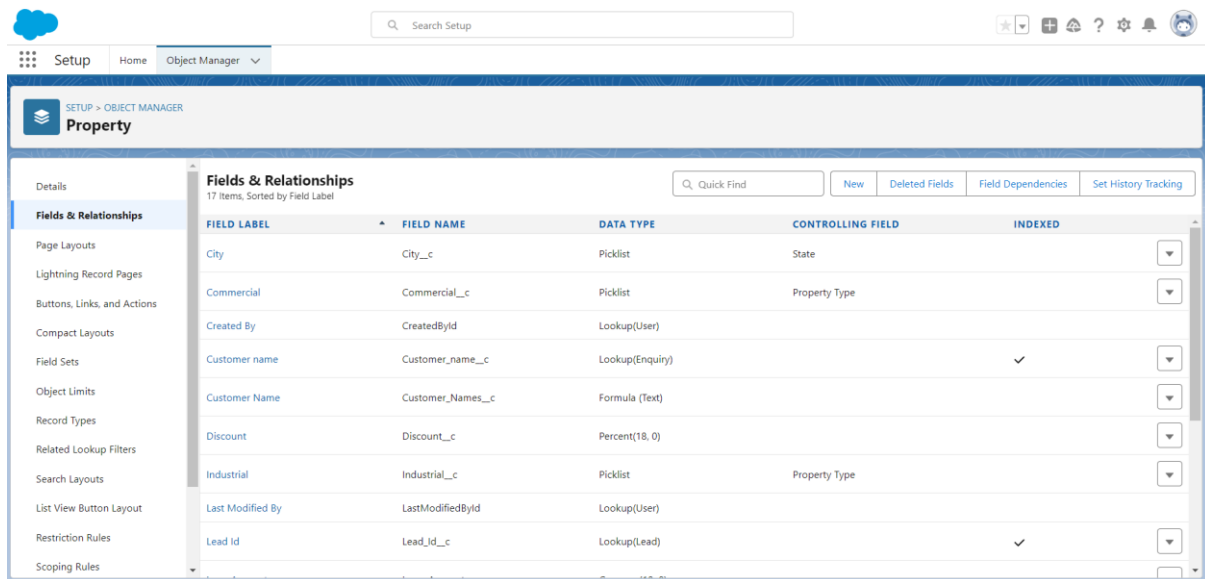
Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for Below Fields.

- 1.Customer name (lookup relationship related to Enquiry)
- 2.Create Property Type: (Picklist fields) (Residential, Commercial, Industrial) (Field Dependency)
- 3.Residential: Picklist fields (1BHK, 2BHK, 3BHK) (Field Dependency)
- 4.Commercial: Picklist fields (Shop, Office) (Field Dependency)
- 5.Industrial: Picklist fields (Factory, Mall) (Field Dependency)

- 6.State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
- 7.City:(Take Any City for Field Dependency)
- 8.Discount:(Percentage As the Field Data Type)
- 9.Price: (Number As the Field Data Type)
- 10.Loan Amount: (Currency As the Field Data Type)

For the Property Object? Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula.

Lead_Id r.Customer_Name c



The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' for the 'Property' object. The 'Fields & Relationships' tab is selected, displaying a table of 17 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are: City, Commercial, Created By, Customer name, Customer Name, Discount, Industrial, Last Modified By, and Lead Id.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Picklist	State	
Commercial	Commercial__c	Picklist	Property Type	
Created By	CreatedById	Lookup(User)		
Customer name	Customer_name__c	Lookup(Enquiry)		✓
Customer Name	Customer_Names__c	Formula (Text)		
Discount	Discount__c	Percent(18, 0)		
Industrial	Industrial__c	Picklist	Property Type	
Last Modified By	LastModifiedById	Lookup(User)		
Lead Id	Lead_Id__c	Lookup(Lead)		✓

4) Creation of Fields for The Loan Object

Create the remaining Fields:

Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for Below Fields

1. Property name: (lookup relationship related to property)
2. Customer name: (lookup relationship related to Enquiry)
3. Interest Rate: (Select the Field Data Type As Currency)
4. Term: (Select the Field Data type as Number)
5. Annual Loan: Field create the Number as the field data type
6. Total Loan Installments: (Field create the Number as the field data type)
7. Loan Repayment: (Field create the Number as the field data type)
8. Loan Amount: (Select the Field data type as Formula)

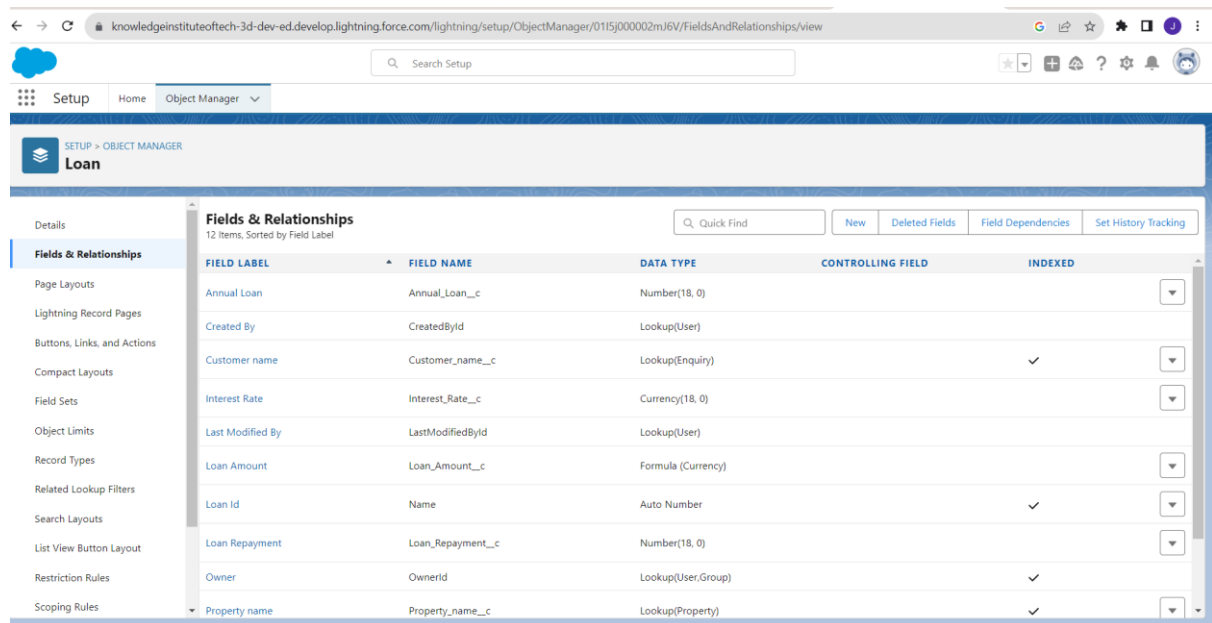
For the Loan Object? Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula

$$(\text{Loan_Repayment_c} * (((1 + (\text{Interest_Rate_c} / 52)))^{\text{Term_c}}) -$$

1))/((

Interest_Rate__c/52)*((1+(Interest_Rate__c/52))^ Term__c))

Check the syntax below whether the formula syntax is correct or not



The screenshot shows the Salesforce Setup interface for the 'Loan' object. The 'Fields & Relationships' section is active, displaying a list of 12 fields. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Customer name	Customer_name__c	Lookup(Enquiry)		✓
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan Id	Name	Auto Number		✓
Loan Repayment	Loan_Repayment__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Property name	Property_name__c	Lookup(Property)		✓

6)Create Field Dependency (On Enquiry Object)

- 1.Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.
- 2.The below steps will assist you in creating Field Dependencies.
- 3.Click on the gear icon and then select Setup.
- 4.Click on the object manager tab just beside the home tab.
- 5.After the above steps, Select Enquiry Object
- 6.Now Select Fields and relationships from setup menu of the Candidate object.
- 7.Click Field Dependencies.
- 8.Click New.
- 9.Select State as the Controlling Field and select City as the Dependent Field.

10. Click Continue.

11. Select the appropriate Value in each column by double-clicking them. For Ex. Rajasthan – Jaipur

12. Click Include Values. And it is also same for UP, MP & Punjab with its city.

13. Click Preview, then test the dependency by selecting different State and viewing the associated Values available for Particular state.

14. Click Close to close the preview window.

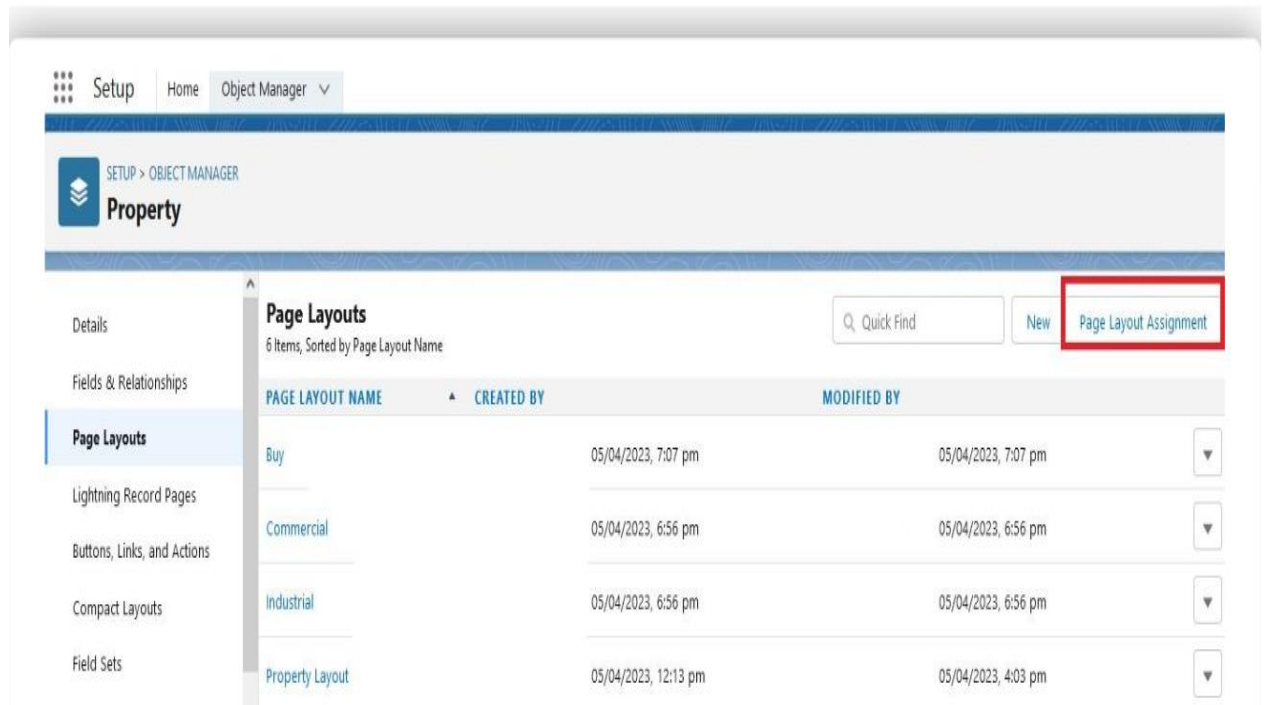
15. Click Save.

The screenshot shows the 'Candidate' object manager interface. The left sidebar contains a menu with 'Details' and 'Fields & Relationships'. The main area displays a dependency table with 'State' as the Controlling Field and 'City' as the Dependent Field. The table has four columns: Rajasthan, UP, MP, and Punjab. The 'City' row shows the following values: Jaipur, Jalandhar, Lucknow, Bhopal, Jaipur, Jalandhar, Lucknow, Bhopal, Jaipur, Jalandhar, Lucknow, Bhopal. The 'Include Values' button is highlighted. A legend indicates that yellow cells represent 'Included Value' and grey cells represent 'Excluded Value'. The table is titled 'Showing Columns: 1 - 4 (of 4) < Previous | Next > View All Go to'.

State	Rajasthan	UP	MP	Punjab
City	Jaipur	Jaipur	Jaipur	Jaipur
	Jalandhar	Jalandhar	Jalandhar	Jalandhar
	Lucknow	Lucknow	Lucknow	Lucknow
	Bhopal	Bhopal	Bhopal	Bhopal

Page Layout Assignment

1. Go to setup? click on Object Manager? type object name in search bar? click on the object
2. Now click on “page layout”? click page layout assignment
3. Select the buy record type and select page layout to use(buy) then click on save.



4. Select the buy record type and select page layout to use(buy) then click on save

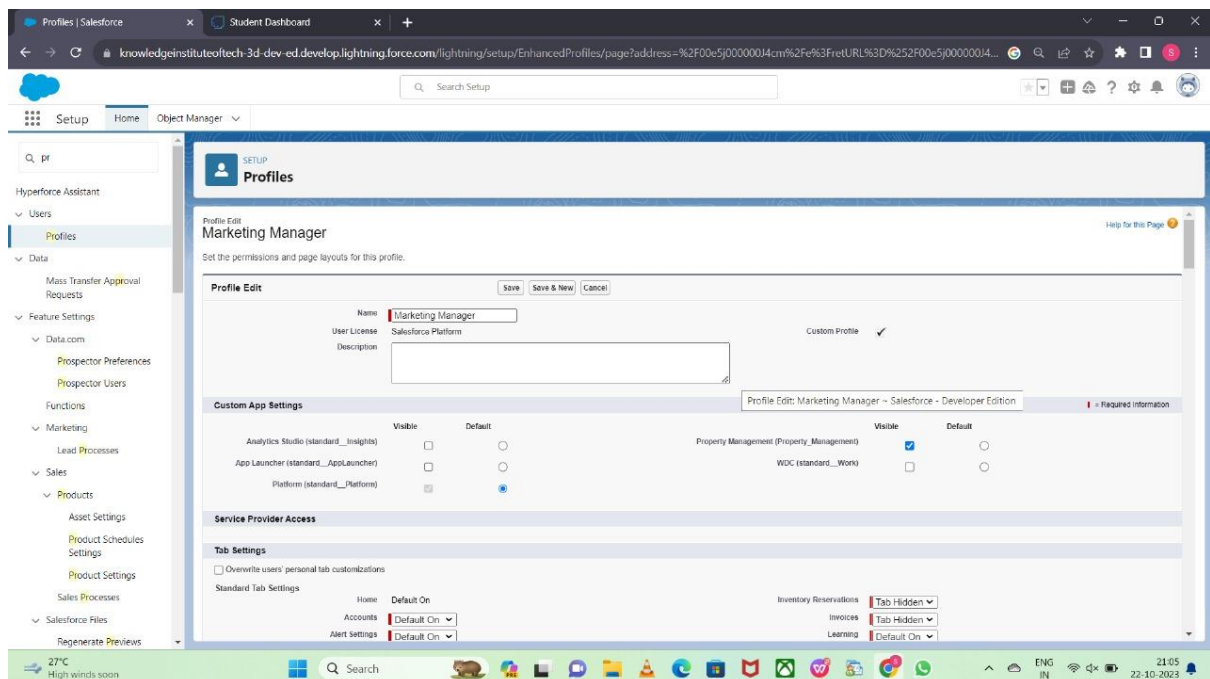
4. USERS & DATA SECURITY

Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A 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. A profile can be assigned to many users, but user can be assigned single profile at a time.

1)Create A Custom Profile

- 1.From setup, enter profiles in Quick Find box
- 2.Select profiles (Marketing Manager).
- 3.Click clone.
- 4.For Profile, enter Buyer.
- 5.Click save.



2)Create A Custom Profile-2

- 1.Create a profile with the profile name as “Sales Manager”.
- 2.From setup, enter profiles in Quick Find box
- 3.Select profiles (Standard user).
- 4.Click clone.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profile' entered, and a list of categories including 'Users' and 'Profiles'. The main content area is titled 'Sales Manager' and includes a 'Profile Edit' section with fields for Name, User License, and Description. Below this is a 'Custom App Settings' table with columns for 'Visible' and 'Default' for various applications.

App	Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
Job Application Tracking (Job_Application_Tracking)	<input type="checkbox"/>	<input type="radio"/>
KIOT (KIOT)	<input type="checkbox"/>	<input type="radio"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

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.

1)To Create A User

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

2.Click New User.

First Name: Sunny

Last Name: Gupta

Alias: Sanjeev

Email: provide your personal email id for future reference

Username: sunnygupta@thesmartbridge.com

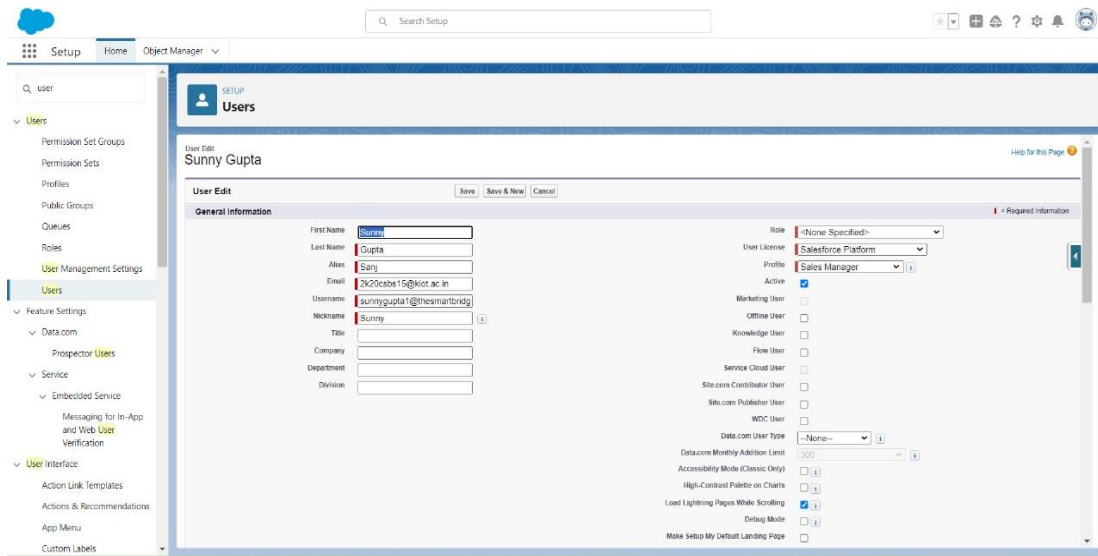
Nickname: Sunny

Role: leave it as default

User License: Salesforce

Profile: Sales Manager and Click Save Button.

8.Click save



8. Click save

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.

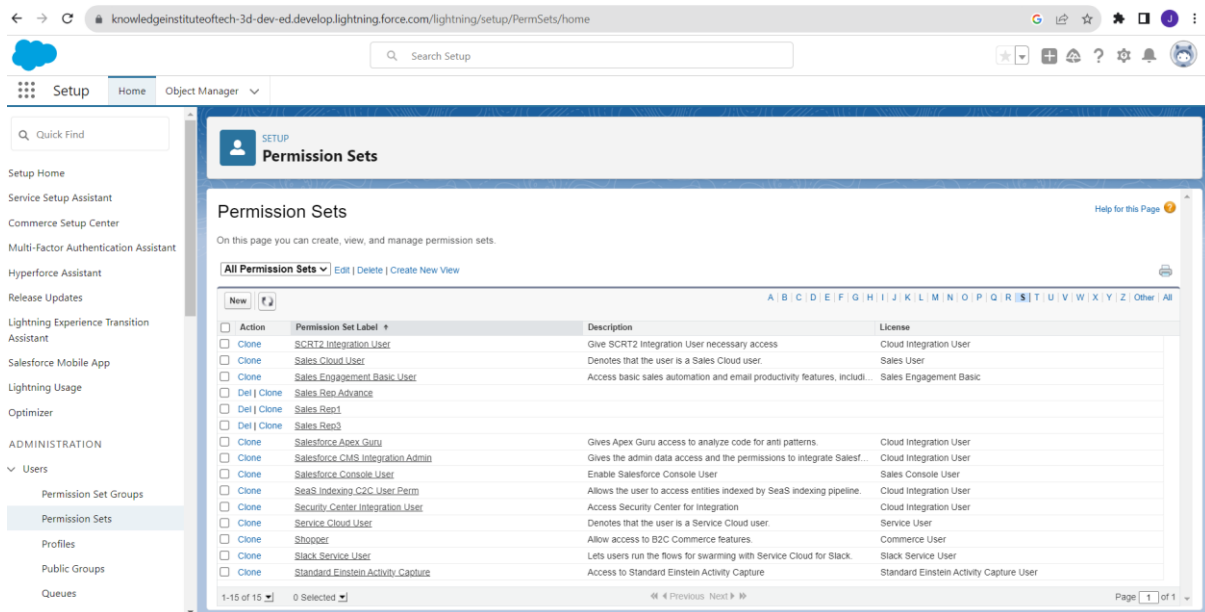
1. Go to setup ? type “permission sets” in quick search ? select permission sets ? New
2. Enter the label name (Sales Rep Advance)? save
3. Select Object settings
4. Search object property and select property object. and click Edit button
5. In Object Permission we give View all permission. And click save button

Repeat 4th and 5th steps for Enquiry and Loan objects.

After saving the permission click on the Manage assignment

6. Now click on the Add Assignment

7. Now select the user (sunny) and click on next & assign.



Set Up For OWD

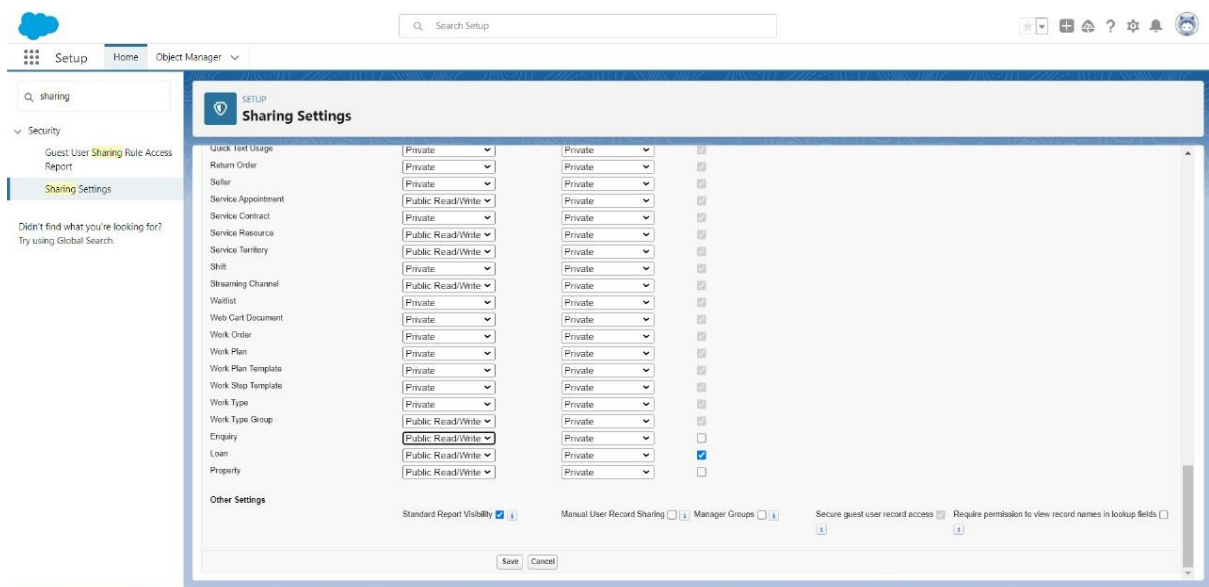
1. Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, 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

- 1.Public Read/Write/Transfer (only available of Leads and Cases)
- 2.Public Read/Write
- 3.Public Read/Only
- 4.Private

Create OWD Setting

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



USER ADOPTION

User adoption is the process of enabling users to use the full capabilities of the Salesforce CRM. Here are some strategies to increase Salesforce user adoption:

- Offer adequate training: Provide online training resources, remote support, and integrate the platform with other tools.
- Create a Salesforce training folder: Create strategies around onboarding, training, and continued development.
- Define adoption metrics: Plan which metrics you want to track and how you'll track them.

Some important metrics include:

- User login rates
- Record creation rates
- Contact creation rates
- Opportunity creation rates
- Activity completion
- Open and closed tasks

5.AUTOMATION

Flow:

Flows in Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language. Flows fall into five categories:

- 1.Screen Flows
- 2.Schedule-Triggered Flows
- 3.Autolaunched Flows
- 4.Record-Triggered Flows
- 5.Platform Event-Triggered Flows

Classic Email Template

1.Go to the Gear Icon? Click on the home button and Search for the Classic Email Template? Click on the New Template? name? Loan Amount Pay Reminder

Author as the System admin user?give Description?Reminder Calls Clone that Email Template and follow the steps which is mentioned above and give the following names you have to clone it multiple times that template

1. Loan Amount pay Reminder for 24 hrs
2. Overdue by one day

knowledgeinstituteoftech-3d-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/home

Setup Home Object Manager

Q classic

Email

Classic Email Templates

Classic Letterheads

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

Classic Email Templates

Unfiled Public Classic Email Templates

Help for this Page

Classic Email Template Availability [Expand]

Folder: Unfiled Public Classic Email Templates Create New Folder

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon Chime.	sfdcadm	09/09/2023
Edit Del	Appointment for Unauthenticated User using Appointment Types - For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications.	sfdcadm	09/09/2023
Edit Del	Appointment for Unauthenticated User using Engagement Channels-For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon Chime.	sfdcadm	09/09/2023
Edit Del	Appointment for Unauthenticated User using Engagement Channels-For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications.	sfdcadm	09/09/2023
Edit Del	Commerce Reorder Portal- Invitation	Custom	✓	Invite a contact to a Commerce Reorder Portal.	autoec	18/10/2023
Edit Del	Loan Amount Pay Reminder	Text	✓	Sending the mail to the user for the remainder call to pay the loan amount	JGIRI	20/10/2023
Edit Del	Loan Amount pay Reminder for 24 hrs	Text	✓	Sending the mail to the user for the remainder call to pay the loan amount	JGIRI	20/10/2023
Edit Del	Marketing- Product Inquiry Response	Text	✓	Standard email response to website product inquiries	JGIRI	09/09/2023
Edit Del	Sales- New Customer Email	Text	✓	Email to new customers	JGIRI	09/09/2023
Edit Del	SUPPORT- Self-Service New Comment Notification (SAMPLE)	Text	✓	Sample email template that can be sent to your Self-Service customers to notify them a public comment has been added to their case.	JGIRI	09/09/2023

https://knowledgeinstituteoftech-3d-dev-ed.develop.lightning.force.com/one/app#/setup/CommunicationTemplatesEmail/home

Email Alert is notice for the above mentioned periods.

knowledgeinstituteoftech-3d-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowEmails/page?address=%2F01W

Setup Home Object Manager

Q email alerts

Process Automation

Workflow Actions

Email Alerts

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

Email Alerts

All Email Alerts

Help for this Page

Email alerts are the emails that workflow rules send when triggered.

View: All Email Alerts Create New View

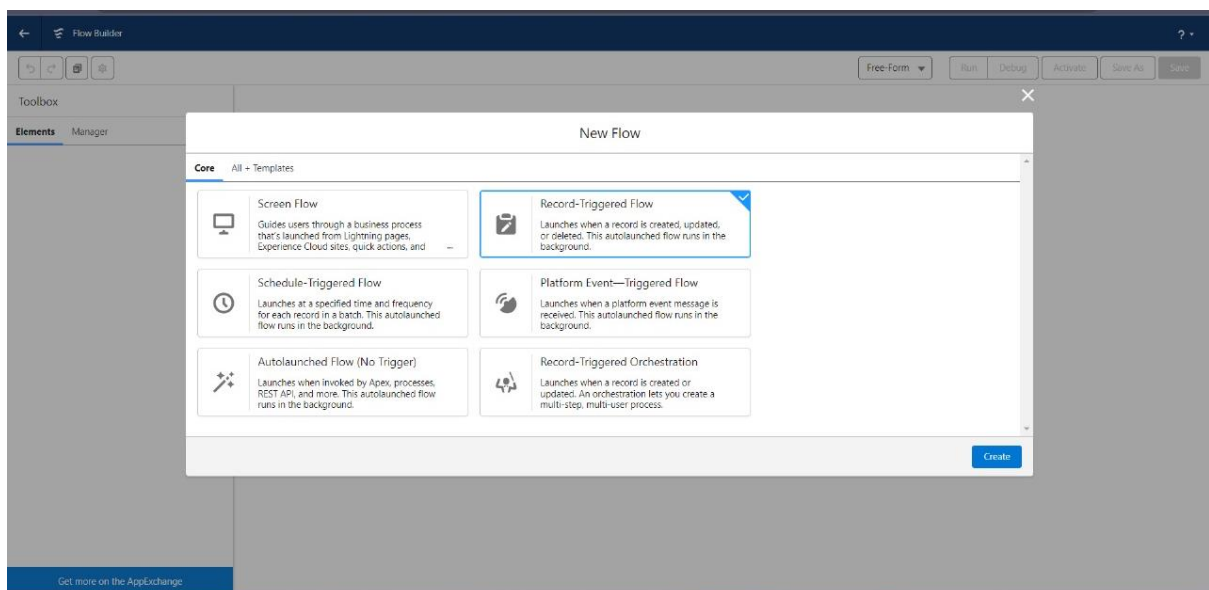
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Email For the 24 hrs before	Loan Amount pay Reminder for 24 hrs	Loan	20/10/2023

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Create The Flows

- Go to the Home Button and search for the flow
- Click on the New Flow---->Click on the Record Trigger Flow
- Select the loan__c object----> Trigger the Flow When----> A Record is created or updated
- Condition Requirement?All Conditions are met (AND) ----> Field---->Due Date For the Loan PaymentOperator as --->is Nullvalue False
- Click on the Schedule path----> Path Label as---->within 1 Day- ---> API Name within_1_day?
- Time Source? Loan__c:Due Date Loan payment ---> Offset number 24----> offset option



Flow Builder within 1 Day - V1

Auto-Layout Version 1: Inactive—Last modified 2 days ago Run Debug View Tests Activate Save As Save

Select Elements

Start
Record-Triggered Flow

Object: **Loan** [Edit](#)
Trigger: **A record is created or updated**
Optimize for: **Actions and Related Records**
[+ Add Scheduled Paths \(Optional\)](#)
[Open Flow Trigger Explorer for Loan](#)

Run Immediately

within 5 days Decision

within 5 days

Default Outcome

gentle reminder Email Alert

End

Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
* Object
Loan

Configure Trigger
* Trigger the Flow When:
☐ A record is created
☐ A record is updated
☒ A record is created or updated
☐ A record is deleted

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.
Condition Requirements
None

* Optimize the Flow for:

Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

Flow Builder within 1 Day - V1

Auto-Layout Version 1: Inactive—Last modified 2 days ago Run Debug View Tests Activate Save As Save

Select Elements

Edit Decision

within 5 days (within_5_days) [✎](#)

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER [+](#)

within 5 days

Default Outcome

OUTCOME DETAILS

* Label
within 5 days

* Outcome API Name
within_5_days

Condition Requirements to Execute Outcome
Any Condition Is Met (OR)

Resource
\$Profile.CreatedDate X

Operator
Equals

Value
\$Profile.LastModifiedDate X

[+ Add Condition](#)

When to Execute Outcome

☒ If the condition requirements are met

☐ Only if the record that triggered the flow to run is updated to meet the condition requirements

Cancel Done

Apex Triggers

Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions before or after changes to Salesforce records, such as insertions, updates, or deletions.

A trigger is Apex code that executes before or after the following types of operations:

Insert

Update

delete

merge

upsert

undelete

For example, you can have a trigger run before an object's records are inserted into the database, after records have been deleted, or even after a record is restored from the Recycle Bin.

You can define triggers for top-level standard objects that support triggers, such as a Contact or an Account, some standard child objects, such as a Case Comment, and custom objects. To define a trigger, from the object management settings for the object whose triggers you want to access, go to Triggers.

```
public static void propMethod(List<Property__c> propVar){
public class propClass {
    for(Property__c prop:propVar){
        if (prop.Create_Property_Type__c== 'Residential'){
            prop.Commercial__c='shop';
        }else{
            }
        }
    }
}
```

```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
propTrigger.apxt | propClass.apxc *
Code Coverage: None ▾ API Version: 58 ▾

1 ▾ public class propClass {
2 ▾     public static void propMethod(List<Property__c> propVar){
3
4 ▾     for(Property__c prop:propVar){
5 ▾         if (prop.Create_Property_Type__c== 'Residential'){
6             prop.Commercial__c='shop';
7 ▾         }else{
8
9             }
10        }
11    }
12
13
14 }
```

```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
propTrigger.apxt | propClass.apxc *
Code Coverage: None ▾ API Version: 57 ▾

1 ▾ trigger propTrigger on Property__c (before update) {
2 ▾     if(trigger.isUpdate){
3 ▾         if(trigger.isBefore){
4             propClass.propMethod(trigger.new);
5         }
6     }
7 }
```


6.REPORTS & DASHBOARD

Reports

A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

1)Create A Report

- 1)Go to the app ? click on the reports tab
- 2)Click New Report
- 3)Select report type from category or from report type panel or from search panel (properties with customer name)? click on start report.
- 4)Customize your report, add fields like property name, customer name, city, property type etc. Click on save& run (Properties with Customer Name Report)
- 5)Create Report for following Condition
- 6)Create the Report of the Total Number of Loan Passed for getting the Amount For the Property
- 7)The Condition should be Like Loan Amount \geq to 5000\$



Property Managem...
Properties
Loans
Enquiries
Reports
Dashboards

Report: Properties with Customer name
New Properties with Customer name Report

Enable Field Editing
Add Chart
Edit

Total Records
3

Total Loan Amount
₹0

Total Price
17,000

Property: Created Date	Customer name: Customer Name	Property Type	Commercial	Residential	Industrial	State	City	Loan Amount	Price
19/10/2023 (3)	Madhavan S V	Commercial	Office	-	-	Maharashtra	Nashik	-	2,000
	Shankar M	Residential	-	2BHK	-	Gujarat	Surat	-	5,000
	Prasanth R	Industrial	-	-	Factory	Rajasthan	Jaipur	-	10,000
Subtotal								₹0	17,000
Total (3)								₹0	17,000

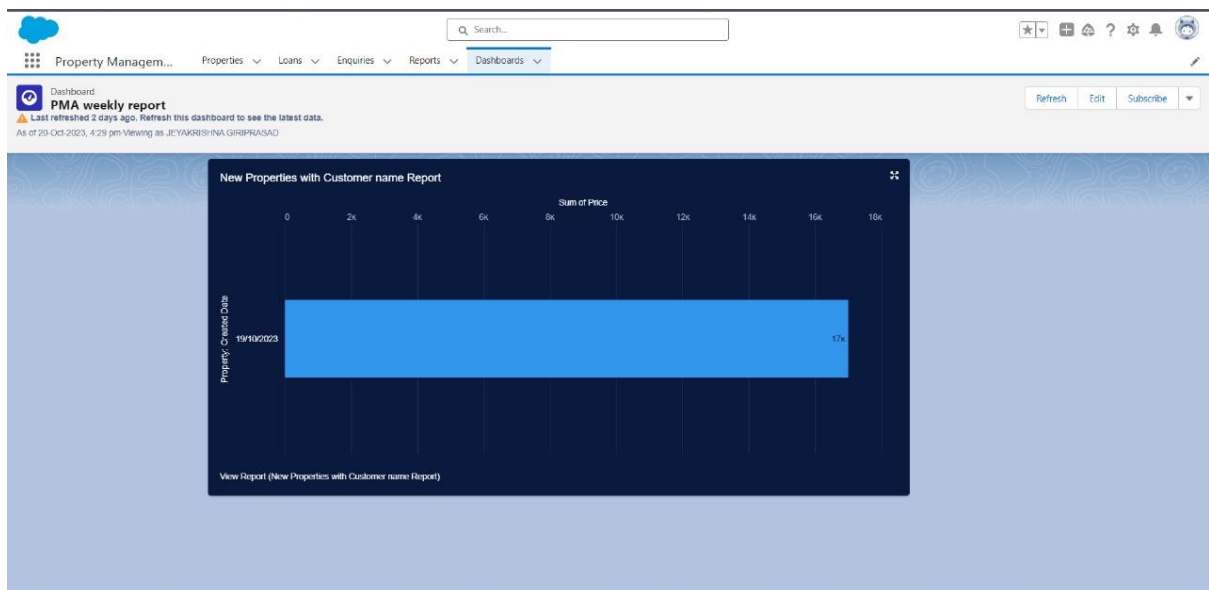
Row Counts
Detail Rows
Subtotals
Grand Total

DASHBOARD

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking at many reports at a time gives the flexibility of combining the results from them quickly. Also, summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

1)Create A Dashboard

- 1.Click the Dashboards tab.
- 2.Click New Dashboard.
- 3.Name the Properties with Customer Name Report and click Create.
- 4.Click +Component.
- 5.Select the Properties with Customer Name Report and click Select
- 6.Select the Vertical Bar Chart component (select in which format you want display chart and click Add.
- 7.Click Save and then Done.



GitHub & Project Video Demo Link

<https://github.com/JEYAKRISHNA19/Naan-Mudhalvan-Salesforce-Developer/tree/main/Property%20Management%20Application>

[https://drive.google.com/file/d/1LgvJkkw00tuu4lp1rb1K5qzaBinBuUf4/view?usp=drive link](https://drive.google.com/file/d/1LgvJkkw00tuu4lp1rb1K5qzaBinBuUf4/view?usp=drive_link)