

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE REPORT

Trailhead link:

<https://www.salesforce.com/trailblazer/kamurudeenj>

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What is Salesforce?

Salesforce is a cloud-based customer relationship management (CRM) platform and a suite of applications designed to help businesses manage their sales, customer service, marketing, and various other aspects of customer engagement. Salesforce provides tools and services for organizations to better understand and connect with their customers, streamline their operations, and make data-driven decisions.

Some key features and components of Salesforce include:

- Sales Cloud: Helps with sales and leads management.
- Service Cloud: Supports customer service and support.
- Marketing Cloud: Provides tools for marketing and automation.
- Commerce Cloud: Facilitates e-commerce and online shopping experiences.
- Community Cloud: Creates online communities for customers, partners, and employees.
- AppExchange: A marketplace for third-party applications and integrations.
- Einstein AI: Incorporates artificial intelligence for predictive analytics and insights.

Salesforce is widely used by businesses of all sizes to improve their customer relationships, manage sales processes, and enhance overall business operations.

OBJECT CREATION:

In Salesforce, object creation refers to the process of defining and setting up custom data structures that represent specific types of information or records that are relevant to your organization. These custom data structures are called custom objects.

Here's how you create custom objects in Salesforce:

1. ****Log in to Salesforce****: Access your Salesforce account with the necessary permissions.
2. ****Access Setup****: Click on the "Setup" link in the top right corner of the Salesforce interface.
3. ****Custom Objects****: In the Setup menu, find and select "Objects and Fields." Under this category, you'll find "Objects." Click on it.
4. ****Create a New Custom Object****: Click on the "Create" button to start creating a new custom object.
5. ****Define Object Properties****: You'll need to specify various properties for the custom object, including the object name, label, plural label, and record name settings. You can also define whether it should be a custom tab, among other options.
6. ****Set Up Fields****: Define the fields (data fields) that the custom object will have. You can specify the data types, whether the field is required, and various other field properties.
7. ****Page Layouts****: Create page layouts to define how the object's records are displayed in the user interface.
8. ****Record Types****: If necessary, set up different record types for the custom object to handle various business processes or scenarios.
9. ****Security Settings****: Configure object-level security settings to control who can access, create, and modify records of this object.

10. **Custom Tabs**: If you want to create custom tabs to display your custom object records, you can do so in the Tabs section.

11. **Save and Deploy**: After configuring all the necessary settings, save your custom object. Once saved, you can deploy it to make it available for use in your Salesforce organization. Custom objects in Salesforce are used to store and manage specific types of data that may not be adequately covered by standard Salesforce objects like Leads, Accounts, etc Opportunities.

Enquiry object :

The screenshot shows the 'Custom Object Definition Edit' page for an object named 'Enquiry'. The page is divided into several sections: 'Custom Object Information', 'Enter Record Name Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', and 'Search Status'. The 'Custom Object Information' section includes fields for 'Object Name' (Enquiry), 'Label' (Enquiry), 'Plural Label' (Enquiries), and 'Starts with word' (Enquiry). The 'Enter Record Name Label and Format' section shows the 'Record Name' as 'Enquiry' and the 'Data Type' as 'Text'. The 'Optional Features' section has checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Lightning'. The 'Object Classification' section has checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Lightning'. The 'Deployment Status' section has radio buttons for 'In Development' and 'Deployed'. The 'Search Status' section has a checkbox for 'Allow Search'. The page also includes a sidebar with navigation links and a footer with copyright information.

property object:

The screenshot shows the 'Custom Object Definition Edit' page for an object named 'Property'. The page is divided into several sections: 'Custom Object Information', 'Enter Record Name Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', and 'Search Status'. The 'Custom Object Information' section includes fields for 'Object Name' (Property), 'Label' (Property), 'Plural Label' (Properties), and 'Starts with word' (Property). The 'Enter Record Name Label and Format' section shows the 'Record Name' as 'Property' and the 'Data Type' as 'Text'. The 'Optional Features' section has checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Lightning'. The 'Object Classification' section has checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Lightning'. The 'Deployment Status' section has radio buttons for 'In Development' and 'Deployed'. The 'Search Status' section has a checkbox for 'Allow Search'. The page also includes a sidebar with navigation links and a footer with copyright information.

Loan object:

i.develop.my.salesforce.com

Home

Chatter

Libraries

Content

Subscriptions

Learn

Leads

Properties

Search

Knowledge 1

Setup

Help

Contact

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Test It! Move

Check Readiness

Quick Find / Search

Loan

Help for this Page

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce

Get Started

Salesforce Mobile Quick Start

Home

Administer

Build

Develop

Deploy

Monitor

Administer

Reassign Updates

Manage Users

Manage Apps

Manage Territories

Company Profiles

Data Classification

Privacy Center

Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Outlook Integration and Sync

Global Integration and Sync

Email Administration

Single Apps

Analytics

Tableau

Data.com Administration

Build

Create

Apps

Custom Labels

Interaction Log Layouts

Objects

Big Objects

Platform Tools Sets

Packages

Report Types

Tools

Service Cloud Launch Pad

Action Link Templates

Global Actions

Workflow & Approvals

Develop

Lightning Bolt

Schema Builder

Lightning App Builder

Canvas App Playground

Installed Packages

Package Usage

AppExchange Marketplace

Deploy

Deployment Settings

Deployment Status

Monitor

System Overview

Optimizer

Insights

Outbound Messages

Time-Based Workflow

Automated Process Actions

Case Escalations

Enhanced Processes

API Usage Notifications

Mass Emails

Email Snapshots

Jobs

Logs

Custom Object Definition Edit

Save

Save & New

Cancel

Custom Object Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with word ☐

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

Object Name Example: Account

Description

Custom Settings

Open the standard Salesforce.com help & Training window

Help

Open a window using a Visualforce page

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 on the API.

Record Name Example: Account Name

Data Type Example: A-00000000000000000000

Display Format Example: A-00000 (What Is This?)

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Learning y

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

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TAB :

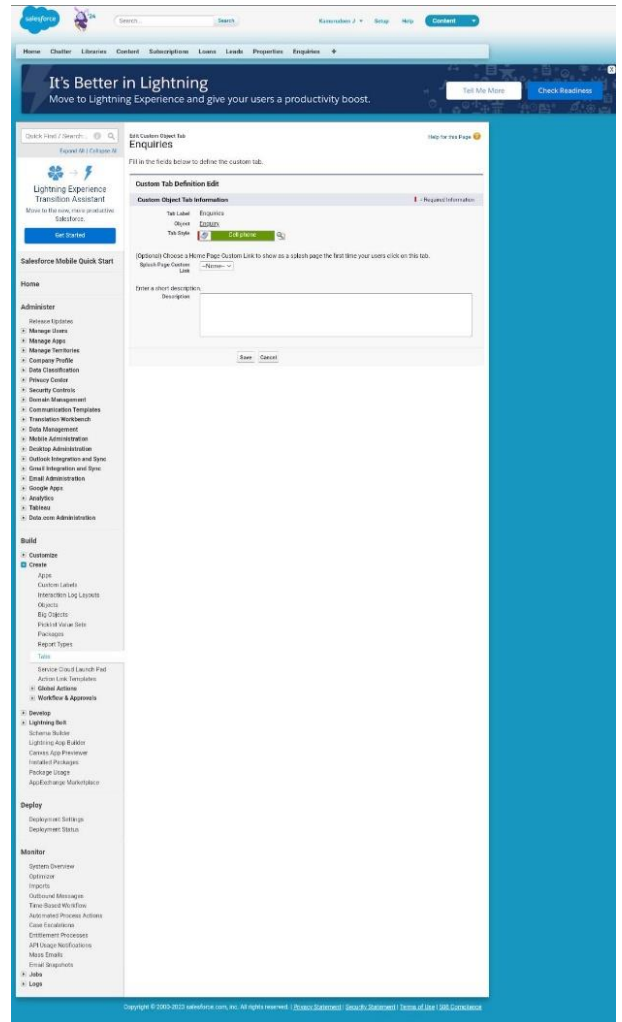
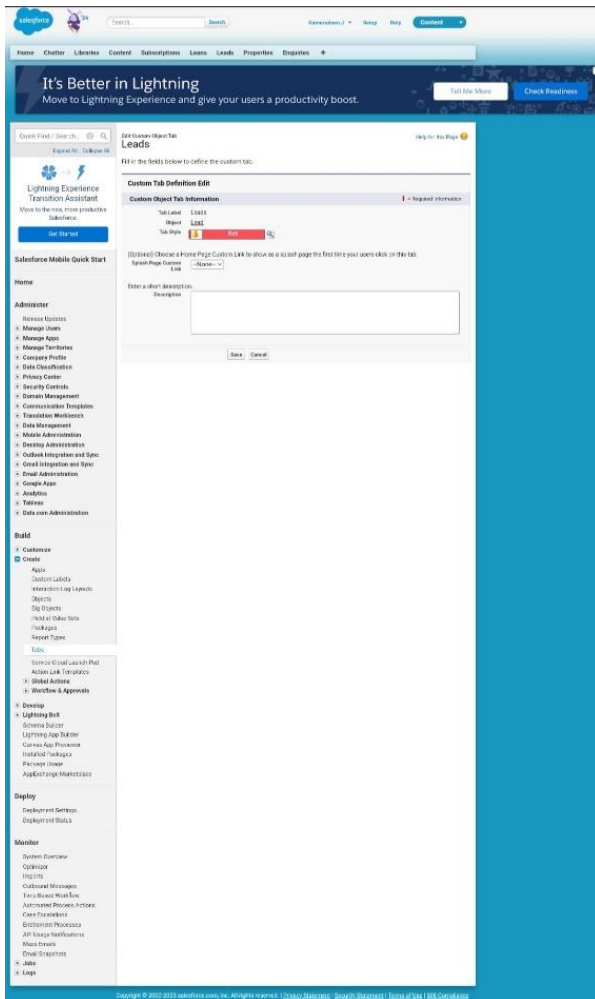
In Salesforce development, a “tab” refers to a user interface element that provides quick access to a specific type of record or custom object within the Salesforce application. Tabs are used to navigate and view data related to standard and custom objects. There are two main types of tabs in Salesforce:

1. ****Standard Tabs****: These are provided by Salesforce for standard objects like Leads, Accounts, Contacts, Opportunities, and other built-in objects. These tabs give users easy access to the standard object’s records and related data.
2. ****Custom Tabs****: Custom tabs are used to provide access to custom objects that you’ve created in your Salesforce organization. When you create a custom object, you can also create a custom tab to display its records in the Salesforce user interface. Custom tabs allow you to extend Salesforce’s functionality to fit your specific business needs.

Custom tabs can be added to an app’s navigation bar, allowing users to access and interact with the custom object’s records. You can also customize the icon and label associated with the tab to make it easily recognizable to users.

Tabs are essential for user-friendly navigation within Salesforce, as they make it convenient to access and work with various types of records and data. They are often used to provide a streamlined user experience, especially when dealing with custom objects or data specific to your organization’s operations.

ENQUIRY AND LEAD OBJECT TAB :



PROPERTY AND LOAN OBJECT TAB:

This screenshot shows the 'Properties' custom tab definition in Salesforce Lightning Experience. The interface includes a top navigation bar with 'Home', 'Chatter', 'Libraries', 'Content', 'Subscriptions', 'Loans', 'Leads', 'Properties', and 'Enquiries'. A sidebar on the left contains navigation links for 'Home', 'Administrator', 'Build', 'Deploy', and 'Monitor'. The main content area is titled 'Custom Tab Definition Edit' and includes a 'Custom Object Tab Information' section. This section contains fields for 'Tab Label' (Properties), 'Object' (Property), and 'Tab Style' (Standard). Below this is a section for 'Optional' information, including a 'Splash Page Custom Link' and a 'Description' field. The bottom of the page features a copyright notice: 'Copyright © 2009-2023 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 996. Contact Us'.

This screenshot shows the 'Loans' custom tab definition in Salesforce Lightning Experience. The interface is similar to the previous one, with a top navigation bar and a sidebar. The main content area is titled 'Custom Tab Definition Detail' and includes a 'Custom Object Tab Information' section. This section contains fields for 'Tab Label' (Loans), 'Object' (Loan), and 'Tab Style' (Standard). Below this is a section for 'Optional' information, including a 'Splash Page Custom Link' and a 'Description' field. The bottom of the page features a copyright notice: 'Copyright © 2009-2023 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 996. Contact Us'.

THE LIGHTNING APP :

In Salesforce, a Lightning app refers to an application built using the Salesforce Lightning platform and framework. The Lightning platform is designed to create modern, responsive, and customizable user interfaces for Salesforce, making it easier for users to interact with their data and perform tasks.

Here are key aspects of a Lightning app in Salesforce:

1. ****User Interface****: Lightning apps provide a dynamic and intuitive user interface with a responsive design, which means it works well on various devices, including desktops and mobile devices. Users can work more efficiently and with a better user experience.
2. ****Customization****: You can tailor a Lightning app to your organization's specific needs by adding various components, tabs, and features. This allows you to streamline and optimize the user interface for different user roles and functions within your organization.
3. ****Components****: Lightning components are building blocks for creating Lightning apps. You can use pre-built components from Salesforce, create your own custom components, or install components from the Salesforce AppExchange to extend your app's functionality.
4. ****Tabs****: Tabs in a Lightning app provide navigation and access to specific features and data. You can create custom tabs to display specific records, objects, or components. Lightning apps are organized around tabs, and you can customize the tabs to match your business processes.
5. ****Automation****: You can leverage automation features like Process Builder and Lightning Flow to automate business processes within your Lightning app. This can help improve productivity and consistency.
6. ****Integration****: Lightning apps can integrate with external systems and data sources using various tools and APIs, allowing you to bring data from different sources into your Salesforce environment.
7. ****App Exchange****: You can extend the functionality of your Lightning app by installing third-party apps and components from the Salesforce AppExchange, which offers a wide range of solutions and integrations.

Fields :

In Salesforce, a “field” refers to a specific data element or attribute that represents a particular piece of information within a record. Fields are used to capture, store, and manage data associated with standard and custom objects in the Salesforce platform. Here are some key points about fields in Salesforce:

1. ****Data Representation****: Fields are used to represent and store various types of data, such as text, numbers, dates, picklists, checkboxes, and more. Each field has a specific data type that defines the kind of data it can hold.
2. ****Standard Fields****: Salesforce provides a set of standard fields for its standard objects (e.g., Account Name, Contact Email, Opportunity Amount). These fields are predefined and come with built-in functionality.
3. ****Custom Fields****: Organizations can create custom fields to capture data specific to their business needs. Custom fields are typically associated with custom objects and can be customized in terms of data type, labels, help text, and other properties.
4. ****Field Properties****: Each field can have various properties, such as field type, required status, unique constraints, default values, and formula expressions. These properties define how the field behaves and what data it can store.
5. ****Validation Rules****: Fields can be used in validation rules to enforce data quality and consistency. For example, you can set up a validation rule to ensure that a phone number field contains a valid phone number format.
6. ****Page Layouts****: Fields are added to page layouts to determine how they are displayed and arranged on the user interface for records. You can customize the arrangement of fields on page layouts to suit your organization’s needs.
7. ****Search and Reporting****: Fields play a crucial role in searching for records and generating reports in Salesforce. You can filter, group, and aggregate data based on field values.
8. ****Data Import and Export****: When importing or exporting data into/from Salesforce, you map fields to ensure that data is correctly placed in the appropriate fields.

home |.develop.lightning.force.com

Search Setup

Setup

Home

Object Manager

Enquiry

11 fields (containing 11 related objects)

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

Field

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy	Buy__c	Auto Number		
Cities	Cities__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		
Email	Email__c	Email		
Enquiry Number	Enquiry_Number__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(UserGroup)		
Phone	Phone__c	Phone		
Rent	Rent__c	Auto Number		
State	State__c	Picklist		

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Search Setup

Setup

Home

Object Manager

Property

16 fields (containing 16 related objects)

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

Field

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Picklist		
Commercial	Commercial_1__c	Picklist		
Commercial	Commercial__c	Picklist		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Enquiry	Enquiry__c	Lookup(Enquiry)		
Industrial	Industrial_1__c	Picklist		
Industrial	Industrial__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Currency(18, 0)		
Owner	OwnerId	Lookup(UserGroup)		
Price	Price__c	Number(18, 0)		
Property Name	Name	Text(80)		
PropertyType	PropertyType__c	Picklist		
Residential	Residential__c	Picklist		
State	State__c	Picklist		

PROFILE:

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

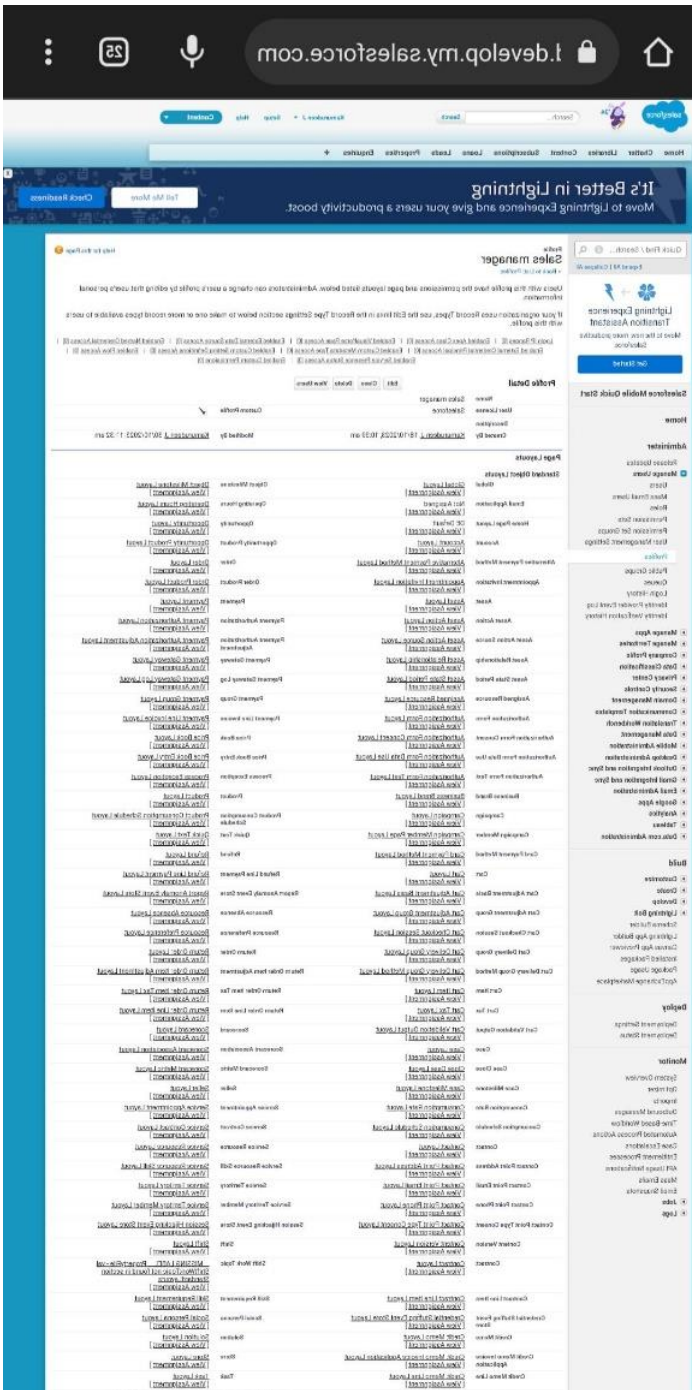
Types of profiles in salesforce

Standard profiles:

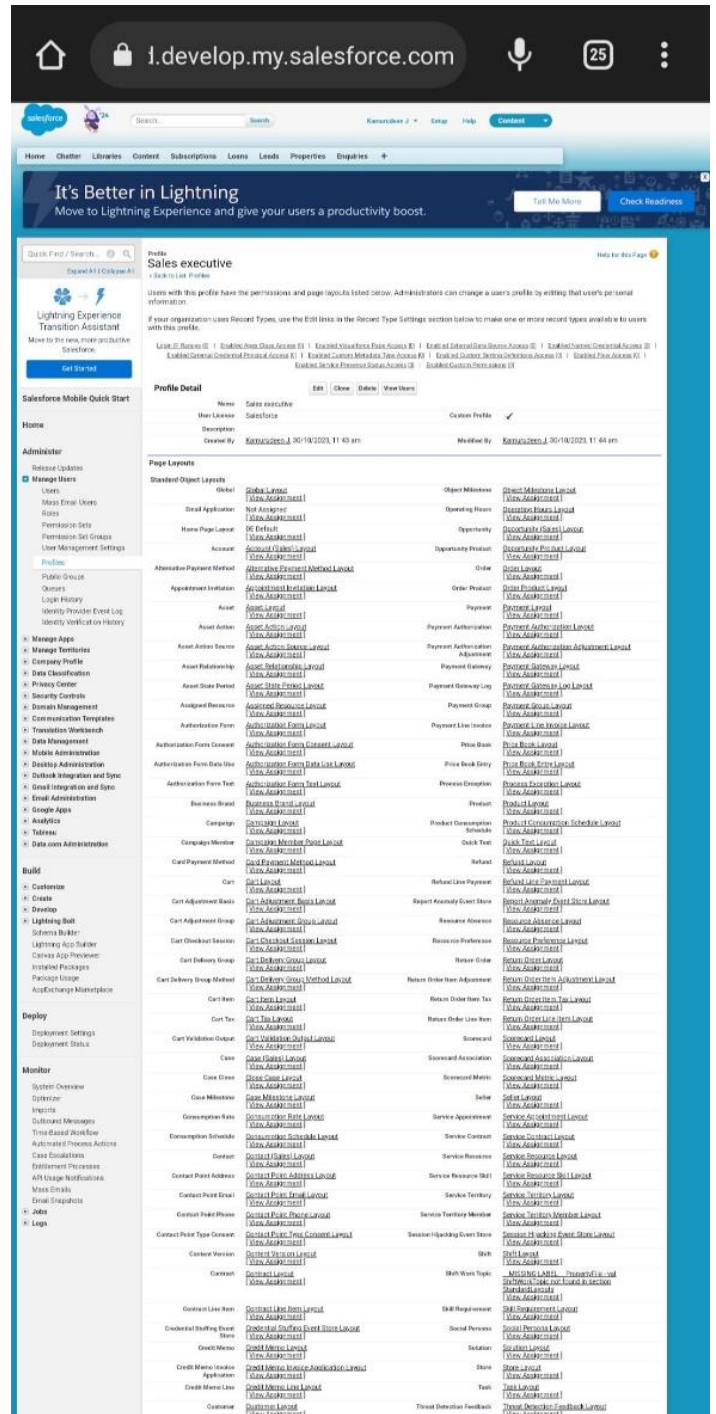
- By default salesforce provide below standard profiles.
- We cannot deleted standard ones
- .Each of these standard one includes a default set of permissions for all of the standard objects available on the platform.

Custom Profiles: Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.



Sales manager profile.



Sales executive profile

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Search

Kamurdeen J

Setup Help Content

Home Chatter Libraries Content Subscriptions Loans Leads Properties Enquiries

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Tell Me More

Check Readiness

Quick Find / Search

Expand All / Collapse All

Profile

Marketing executive

Help for this Page

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

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

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

Profile Detail

Edit Close Delete View Users

Name	Marketing executive	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Kamurdeen J, 30/10/2023, 11:34 am	Modified By	Kamurdeen J, 30/10/2023, 11:39 am

Page Layouts

Global Layout	Object Milestone	Object Milestone Layout
Email Application	Operating Hours	Operating Hours Layout
Home Page Layout	Order	Order Layout
Account Layout	Order Product	Order Product Layout
Alternative Payment Method	Payment	Payment Layout
Appointment Invitation	Payment Authorization	Payment Authorization Layout
Asset	Payment Authorization Adjustment	Payment Authorization Adjustment Layout
Asset Relationship	Payment Gateway	Payment Gateway Layout
Assigned Resource	Payment Gateway Log	Payment Gateway Log Layout
Authorization Form	Payment Group	Payment Group Layout
Authorization Form Consent	Payment Line Invoice	Payment Line Invoice Layout
Authorization Form Data Use	Price Book	Price Book Layout
Authorization Form Text	Price Book Entry	Price Book Entry Layout
Business Brand	Process Exception	Process Exception Layout
Campaign Member	Product	Product Layout
Card Payment Method	Product Consumption Schedule	Product Consumption Schedule Layout
Cart	Refund	Refund Layout
Cart Adjustment Basis	Refund Line Payment	Refund Line Payment Layout
Cart Adjustment Group	Resource	Resource Layout
Cart Checkout Session	Resource Preference	Resource Preference Layout
Cart Delivery Group	Return Order	Return Order Layout
Cart Delivery Group Method	Return Order Item Adjustment	Return Order Item Adjustment Layout
Cart Item	Return Order Item Tax	Return Order Item Tax Layout
Cart Tax	Return Order Line Item	Return Order Line Item Layout
Cart Validation Output	Seller	Seller Layout
Contact	Service Appointment	Service Appointment Layout
Contact Point Address	Service Resource	Service Resource Layout
Contact Point Email	Service Resource Skill	Service Resource Skill Layout
Contact Point Phone	Service Territory	Service Territory Layout
Contact Point Type Consent	Service Territory Member	Service Territory Member Layout
Content Version	Shift Layout	Shift Layout
Contract	Shift Work Topic	Shift Work Topic Layout
Credit Memo	Skill Requirement	Skill Requirement Layout
Credit Memo Invoice Application	Social Persona	Social Persona Layout
Credit Memo Line	Store	Store Layout
Customer	Task	Task Layout
D&B Company	Threat Detection Feedback	Threat Detection Feedback Layout
Data Use Legal Basis	Time Slot	Time Slot Layout
Data Use Purpose	User	User Layout
Digital Wallet	User Profile	User Profile Layout
Email Message	User Provisioning Account	User Provisioning Account Layout
Engagement Channel Type	User Provisioning Log	User Provisioning Log Layout
Event	User Provisioning Request	User Provisioning Request Layout
Feed Item	Waitlist	Waitlist Layout
Idea	Web Store Configuration	Web Store Configuration Layout
Individual	Work Type	Work Type Layout
Invoice	Work Type Group	Work Type Group Layout

marketing executive profile.

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Search

Kamurdeen J

Setup Help Content

Home Chatter Libraries Content Subscriptions Loans Leads Properties Enquiries

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Tell Me More

Check Readiness

Quick Find / Search

Expand All / Collapse All

Profile

Marketing manager

Help for this Page

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

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

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

Profile Detail

Edit Close Delete View Users

Name	Marketing manager	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Kamurdeen J, 30/10/2023, 11:40 am	Modified By	Kamurdeen J, 30/10/2023, 11:41 am

Page Layouts

Global Layout	Object Milestone	Object Milestone Layout
Email Application	Operating Hours	Operating Hours Layout
Home Page Layout	Order	Order Layout
Account Layout	Order Product	Order Product Layout
Alternative Payment Method	Payment	Payment Layout
Appointment Invitation	Payment Authorization	Payment Authorization Layout
Asset	Payment Authorization Adjustment	Payment Authorization Adjustment Layout
Asset Relationship	Payment Gateway	Payment Gateway Layout
Assigned Resource	Payment Gateway Log	Payment Gateway Log Layout
Authorization Form	Payment Group	Payment Group Layout
Authorization Form Consent	Payment Line Invoice	Payment Line Invoice Layout
Authorization Form Data Use	Price Book	Price Book Layout
Authorization Form Text	Price Book Entry	Price Book Entry Layout
Business Brand	Process Exception	Process Exception Layout
Campaign Member	Product	Product Layout
Card Payment Method	Product Consumption Schedule	Product Consumption Schedule Layout
Cart	Refund	Refund Layout
Cart Adjustment Basis	Refund Line Payment	Refund Line Payment Layout
Cart Adjustment Group	Resource	Resource Layout
Cart Checkout Session	Resource Preference	Resource Preference Layout
Cart Delivery Group	Return Order	Return Order Layout
Cart Delivery Group Method	Return Order Item Adjustment	Return Order Item Adjustment Layout
Cart Item	Return Order Item Tax	Return Order Item Tax Layout
Cart Tax	Return Order Line Item	Return Order Line Item Layout
Cart Validation Output	Seller	Seller Layout
Contact	Service Appointment	Service Appointment Layout
Contact Point Address	Service Resource	Service Resource Layout
Contact Point Email	Service Resource Skill	Service Resource Skill Layout
Contact Point Phone	Service Territory	Service Territory Layout
Contact Point Type Consent	Service Territory Member	Service Territory Member Layout
Content Version	Shift Layout	Shift Layout
Contract	Shift Work Topic	Shift Work Topic Layout
Credit Memo	Skill Requirement	Skill Requirement Layout
Credit Memo Invoice Application	Social Persona	Social Persona Layout
Credit Memo Line	Store	Store Layout
Customer	Task	Task Layout
D&B Company	Threat Detection Feedback	Threat Detection Feedback Layout
Data Use Legal Basis	Time Slot	Time Slot Layout
Data Use Purpose	User	User Layout
Digital Wallet	User Profile	User Profile Layout
Email Message	User Provisioning Account	User Provisioning Account Layout
Engagement Channel Type	User Provisioning Log	User Provisioning Log Layout
Event	User Provisioning Request	User Provisioning Request Layout
Feed Item	Waitlist	Waitlist Layout
Idea	Web Store Configuration	Web Store Configuration Layout
Individual	Work Type	Work Type Layout
Invoice	Work Type Group	Work Type Group Layout

Marketing manager profile

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.

The screenshot shows the Salesforce User Detail page for a user named Sunny Gupta. The page is divided into a left sidebar and a main content area. The sidebar contains navigation links for 'Quick Find / Search...', 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administer'. The main content area displays the user's profile information, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver. It also shows the user's Role, User License, Profile, and various permissions and settings.

User Detail	
Name	Sunny Gupta
Alias	sanj
Email	jkamurudeen2@gmail.com [Verify]
Username	sunny_gupta@thesmartbridge.com
Nickname	Sunny
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Role	Salesforce
User License	Sales manager
Profile	
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<input type="checkbox"/>
Data.com User Type	<input type="checkbox"/>

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.

The screenshot shows the Salesforce Permission Set page for a permission set named Sales Rep3. The page is divided into a left sidebar and a main content area. The sidebar contains navigation links for 'Quick Find / Search...', 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administer'. The main content area displays the permission set's overview, including Description, License, Session Activation Required, Permission Set Groups Added To, API Name, Namespace Prefix, Created By, and Last Modified By. It also shows the assigned apps and settings for the permission set.

Permission Set Overview	
Description	
License	
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	0
API Name	Sales_Rep3
Namespace Prefix	
Created By	Kamurudeen J. 30/10/2023, 11:56 am
Last Modified By	Kamurudeen J. 30/10/2023, 12:00 pm

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform. [Learn More](#)

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

The problem statement in property management using Salesforce typically revolves around the challenges and pain points faced by property management companies or professionals in efficiently managing their properties and related tasks. Here's a general problem statement:

****Problem Statement****: Property management organizations are struggling to effectively oversee and maintain their property portfolios due to a lack of centralized data, manual processes, and limited visibility into property-related information. These issues lead to inefficiencies, increased operational costs, and a diminished ability to provide superior service to property owners and tenants.

More specific aspects of the problem might include:

1. ****Data Fragmentation****: Property information is scattered across various spreadsheets, documents, and legacy systems, making it challenging to maintain a single source of truth for property details.
2. ****Manual Processes****: Property management tasks, such as lease management, maintenance requests, and financial reporting, are often handled manually, leading to errors, delays, and increased administrative overhead.
3. ****Limited Reporting****: Property managers lack real-time visibility into property performance and financial data, hindering data-driven decision-making and forecasting.
4. ****Ineffective Tenant and Owner Communication****: Property managers struggle to efficiently communicate with tenants and property owners, leading to customer dissatisfaction and missed opportunities for upselling or cross-selling additional services.
5. ****Maintenance Management****: Managing property maintenance and service requests is a complex and disorganized process, resulting in delayed responses and unresolved issues.

To address these challenges, the solution may involve implementing Salesforce for property management, where Salesforce's CRM and platform capabilities can be leveraged to centralize property data, automate processes, enhance communication, and provide real-time insights into property performance. This would streamline property management operations and improve overall efficiency and customer satisfaction.

Thanking you