

PROJECT REPORT TEMPLATE

1. INDRODUCTION

1.1 Over view

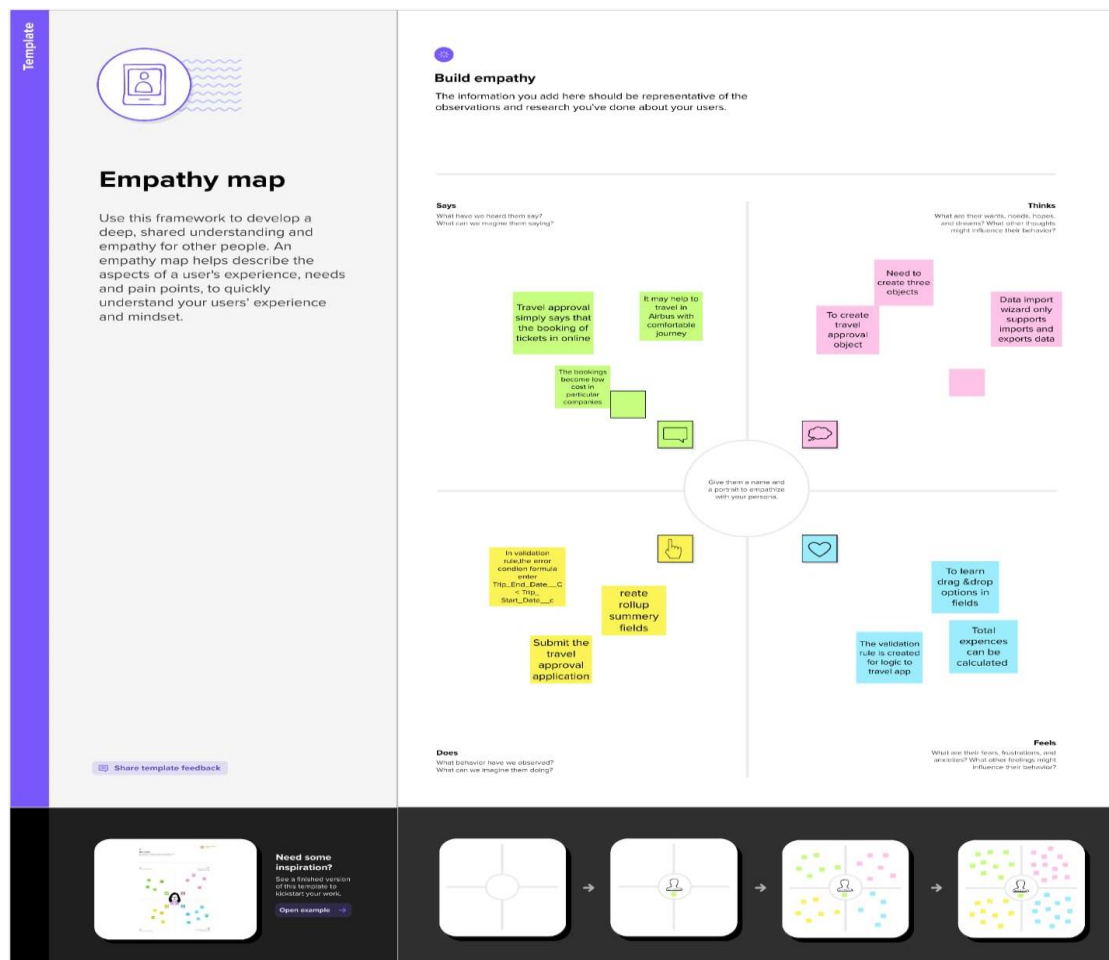
Develop an app for properly management where buyer can order his requirement and get the appropriate details of the property. Provide the security for two different profile like for marketing and sales team.

1.2 Purpose

Then finally create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased closed the deal.

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1 Empathy Map



2.2 Ideation and brainstorming screenshot



3. RESULT

3.1 data model :

OBJECT NAME	FIELDS IN THE OBJECT	
LEAD	FIELD LABEL	DATA TYPE
	LEAD	AUTO NUMBER
BUY	FIELD LABEL	DATA TYPE
	BUY	PICKLIST

RENT	FIELD LABEL	DATA TYPE
	RENT	AUTO NUMBER
LOAN	FIELD LABEL	DATA TYPE
	LOAN	AUTO NUMBER

3.2 Activity and Screenshot:

ACTIVITY 1:

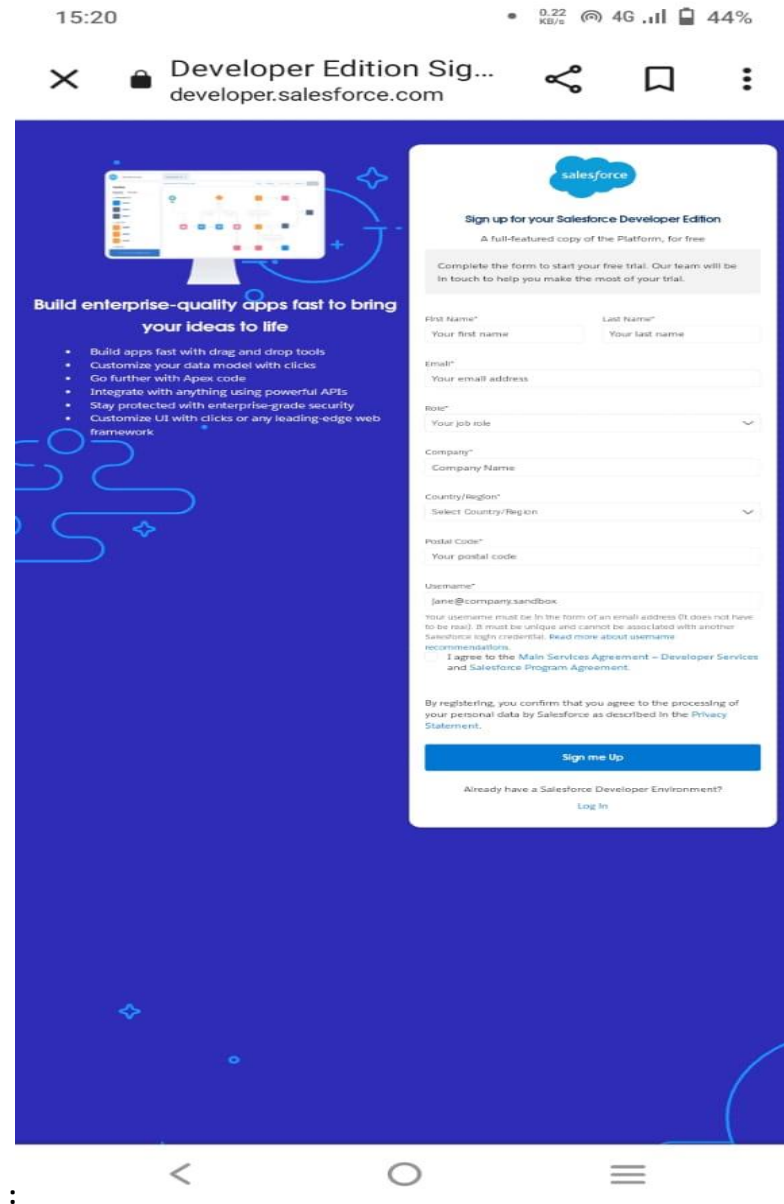
Creating developer account

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
2. click on sign up
3. On the sign up form, enter the following details
 - a. first name & last name
 - b. Email
 - c. Role : Developer
 - d. company : college name
 - e. country : India
 - f. Postal code : pin code
 - g. User name : should be a combination of your name and company

The need not be an actual email id, you can give any thing in the format:

username@organization.com



Activity 2

Account Activation

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

MILESTONE 2: OBJECT

Salesforce objects are of two types:

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

ACTIVITY 1:

OBJECT -

To navigation to set up page

The screenshot shows the Salesforce Setup page in a web browser. The browser tabs include 'Home | Microsoft 365', 'Document 1.docx - Microsoft Word', and 'Home | Salesforce'. The address bar shows the URL 'teddy6-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home'. The page has a left sidebar with a 'Setup' menu and a 'Quick Find' search bar. The main content area is titled 'SETUP Home' and features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with a table of 10 items.

NAME	TYPE	OBJECT
Lead	Custom Field Definition	Lead
Lead	Custom Object Definition	
Buy	Custom Object Definition	
city	Custom Object Definition	

Activity 2:

Create Object Buy

1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name→Buy
4. plural label name→ Buyers
5. click on Allow reports,
6. Allow search → Save

Activity3:

Create Object Rent

1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name→Rent
4. plural label name→ Rents
5. click on Allow reports,
6. Allow search → Save

Activity3:

Create Object Loan

7. To create an object:
8. From the setup page → Click on Object Manager → Click on Create → Click on Custom object.
9. Enter the label name→Loan
10. plural label name→ Loans
11. click on Allow reports,
- 12.Allow search → Save

Milestone 3:Tab

What is Tab?

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

Types of Tab

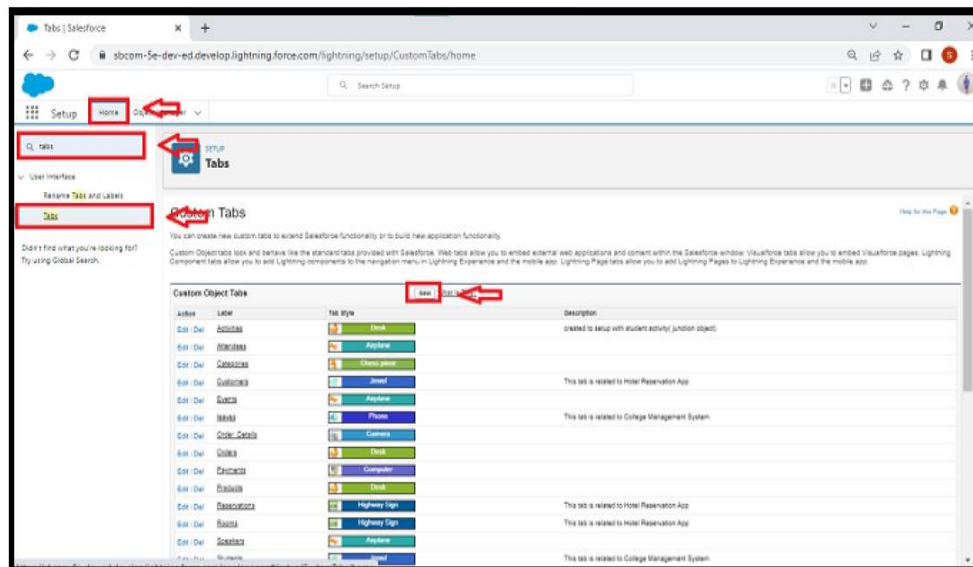
- Custom object tab
- Web tab
- Visualforce tab

Activity 1:

Create the Lightning Tab

To create a Tab:(Lead)

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



Activity 2:

To create a Tab:(Buy)

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

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

Activity 3:

To create a Tab:(Rent)

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

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

Activity 4 :

To create a Tab:(Loan)

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

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

Milestone 4- The Lightning App:

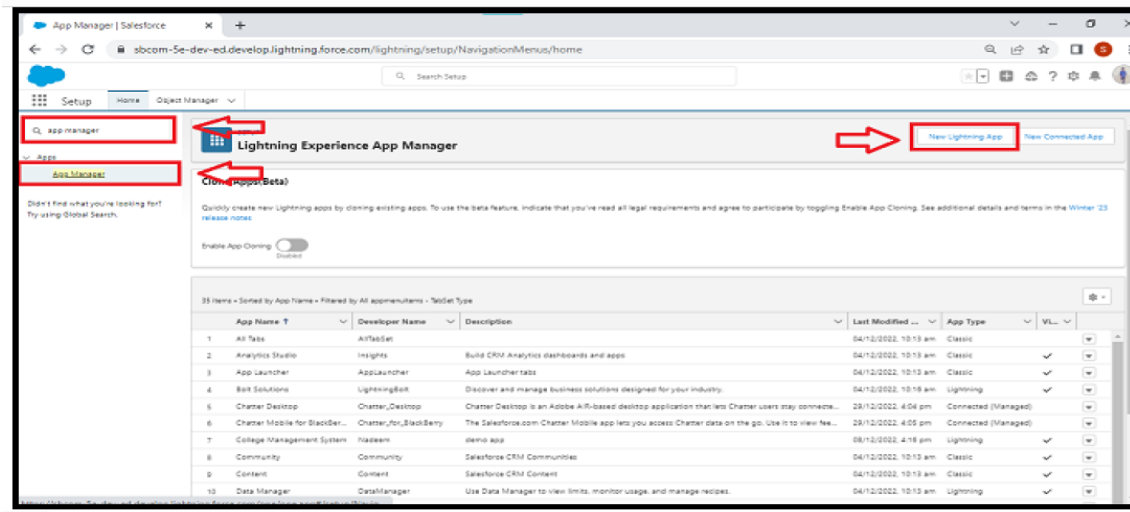
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

Activity1:

Create the Lightning App

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



Milestone5-Fields :

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

Types of Fields

- Standard Fields
- Custom Fields

Standard Fields:

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

- Created By

- Owner
- Last Modified
- Field Made During object Creation

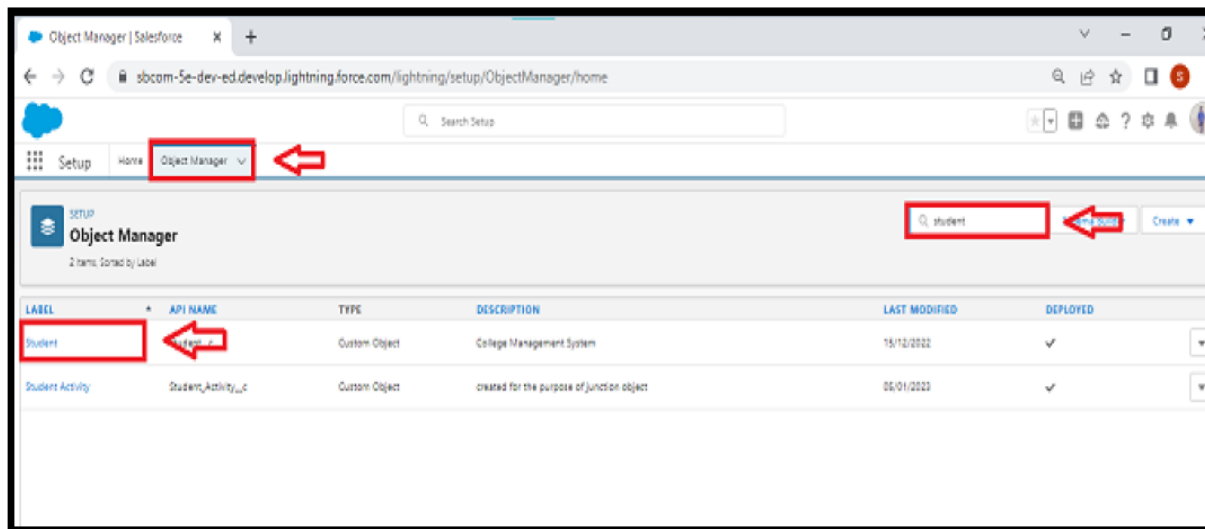
Custom Fields:

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

Activity 1:

Create the Lead Field

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



Create the remaining Fields:

Follow the Above Steps to create the Field just change the Labels for Below Fields

Lead : (AutoNumber Created Field while creating Object) → L-{0000}

State : Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

City : create the Picklist(Mumbai, Pune, Nashik)(Field Dependency)

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

Phone :Select the Field Data type as (Phone)

Activity2:

For Object Buy

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

Activity3:

Create Field for Rent

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

Activity4:

Create Field for Loan

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

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

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

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

Milestone 6: Profile

- A profile is a group/collection of settings and permissions that define what a user can do in salesforce.

- profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

- You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

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

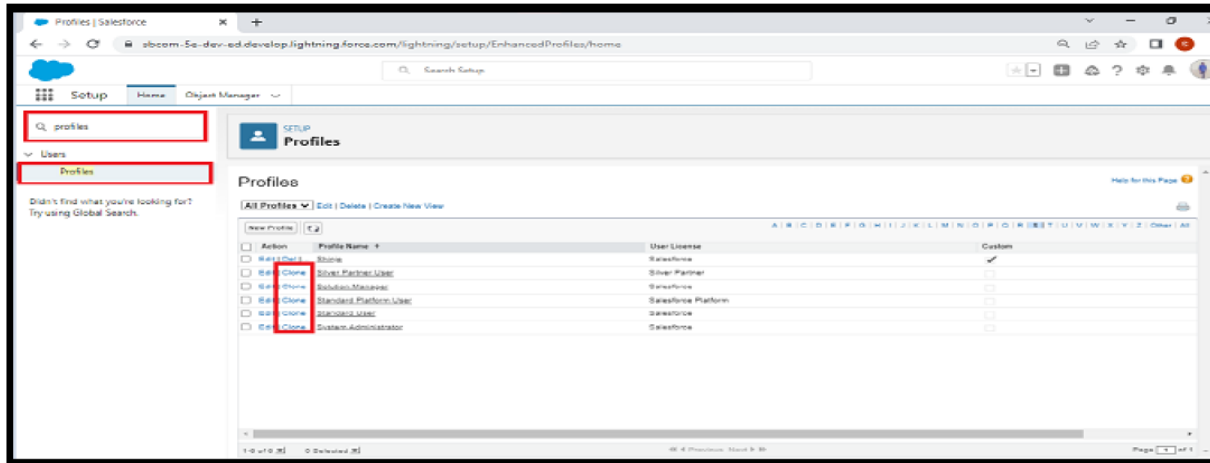
2. Custom Profiles:

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

Activity 1:

To create a new profile:

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



Activity 2:

CREATE MARKETING :

1. Marketing manager should have access to marketing executive.

Activity 3:

SALES:

1. In the profile level sales manager is having create edit and delete.

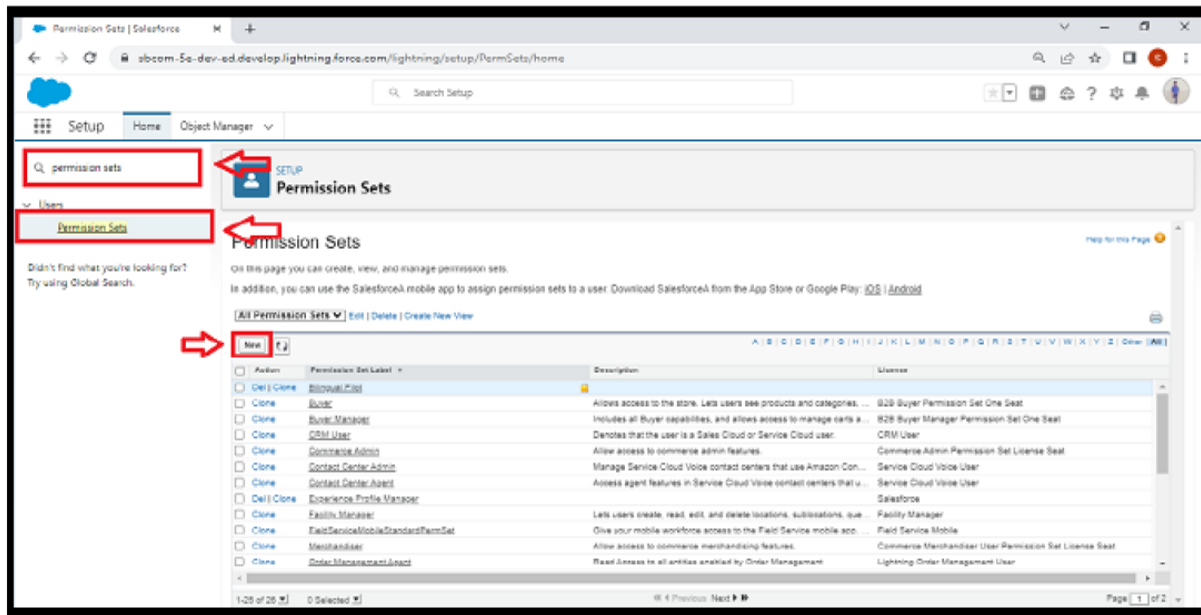
Milestone7-New User

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

Activity 1:

Create User

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



Milestone 9: Setup For OWD

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

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

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

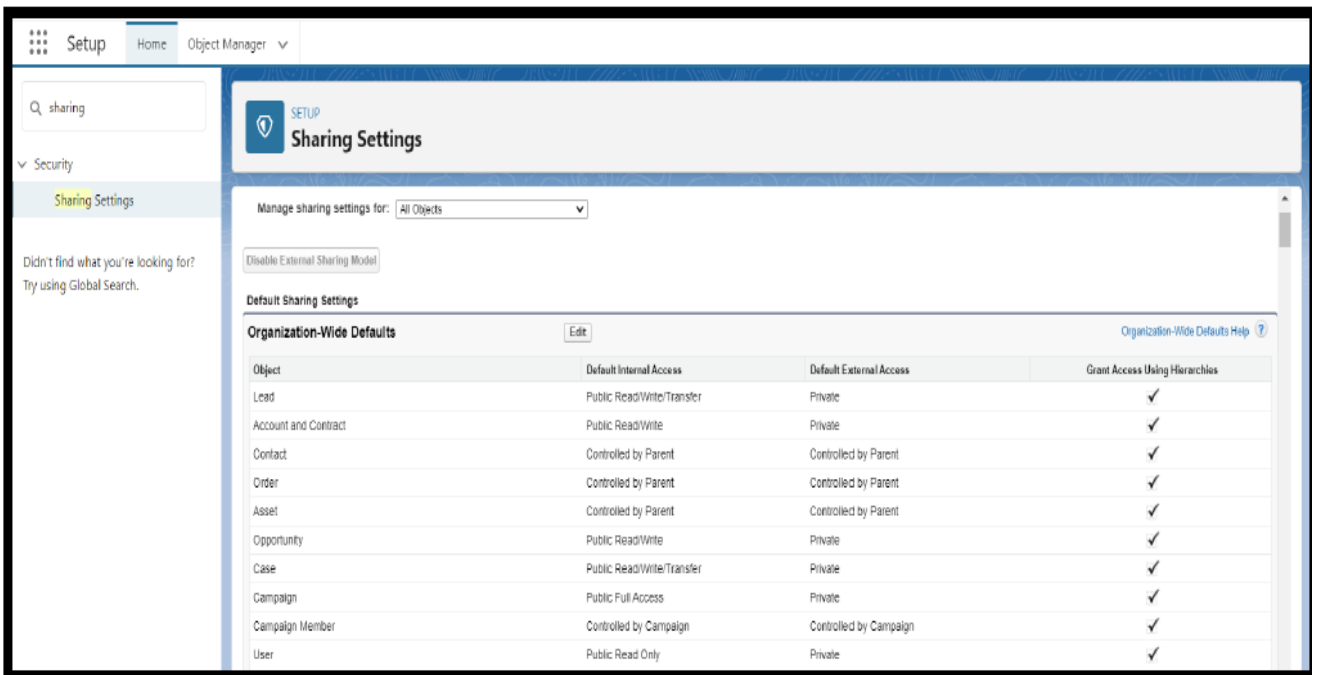
Activity1:

Create OWD Setting

1. Setup, use the Quick Find box to find Sharing Settings.
2. Click Edit in the Organization-Wide Defaults area.
3. For each object, select the default access you want to give everyone.
4. To disable automatic access using your hierarchies, deselect Grant Access Using

Hierarchies for Lead, Rent custom object

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



Activity 2:

Marketing

1. Create the Record Level OWD Setting give it As A Private To Marketing manager And Marketing Executive

Sales:

1. Sale Manager OWD is Set As Private similarly sales Rep1, Sales Rep2 same OWD for them.

Milestone10-Report

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

Types of Reports in Salesforce

Tabular

Summary

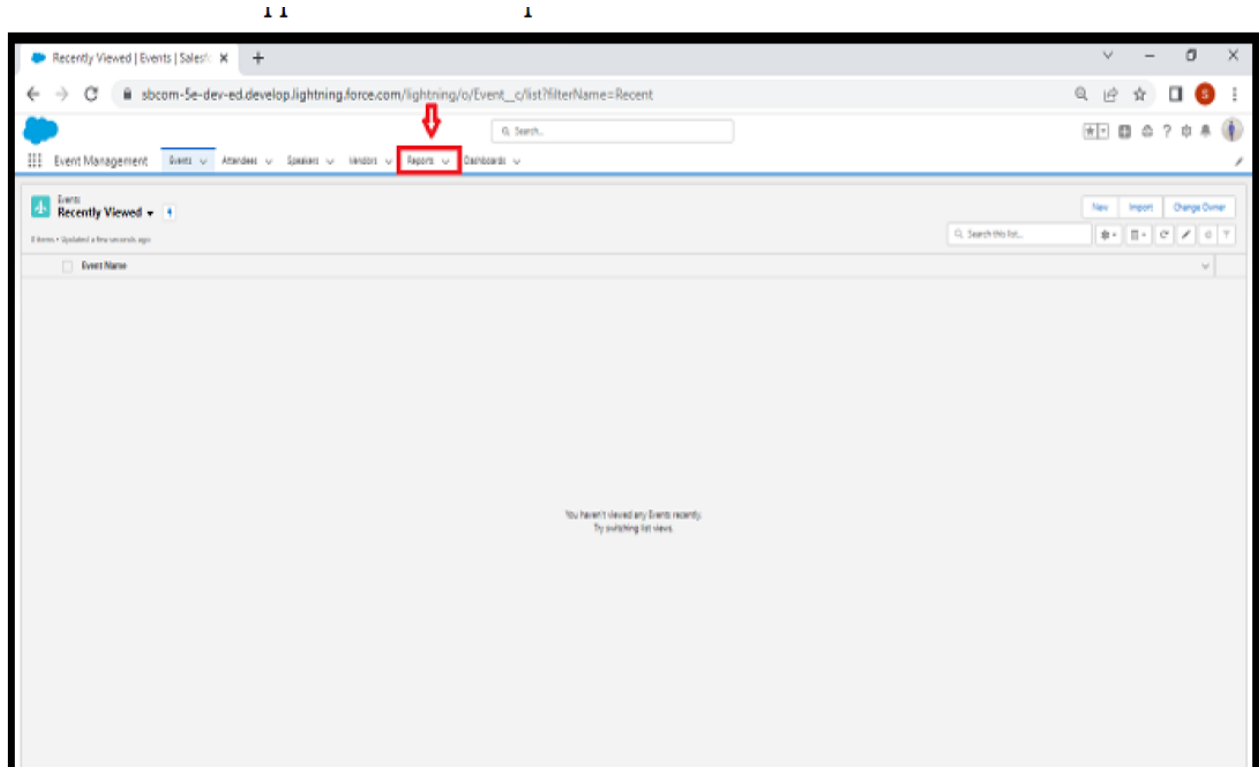
Matrix

Joined Reports

Activity 1:

Create Report-

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



Create Report for following Condition

1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the Property
2. The Condition should be Like Loan Amount \geq to 5000\$

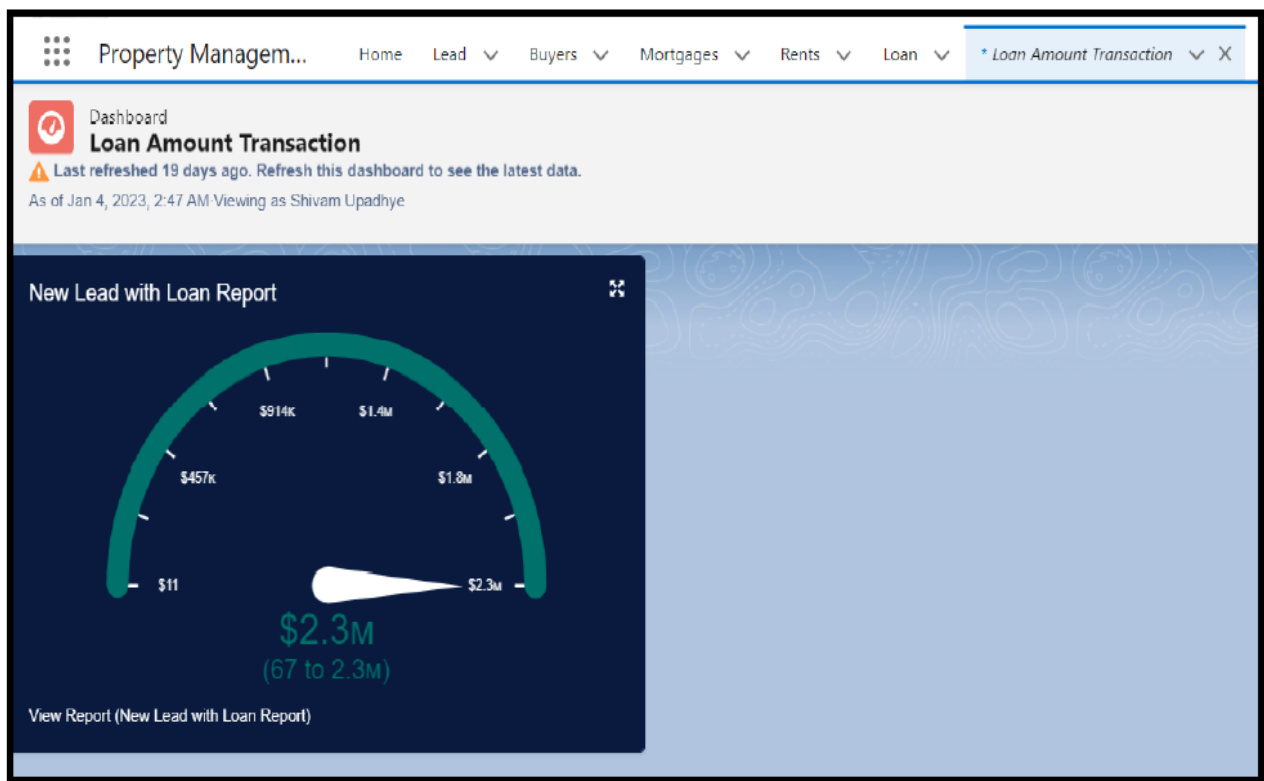
Milestone11-Dashboards

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

Activity1:

Create dashboards

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



Activity2:

Create Dashboard

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

4. TRAILHEAD PROFILE PUBLIC URL:

Team Lead – <https://trailblazer.me/id/lav2003>

Team member 1 – <https://trailblazer.me/id/krish2002>

Team member 2 – <https://trailblazer.me/id/kavir46>

Team member 3 – <https://trailblazer.me/id/leome15>

5. ADVANTAGES AND DISADVANTAGES :

- **ADVANTAGES:**

- 1) Streaming lead, opportunity, and contact management.
- 2) Simplify document management and data sharing.

3) Enhance communication and collaboration tools.

4) Have reminders and notifications of important events, emails and calls.

- **DISADVANTAGES:**

1) Lack of specialists that have a deep understanding of property management business and its priorities.

2) Higher price if you look not only for technical skills but for industry expertise, especially in specific niches like property management.

3) Need for continuous platform improvement and maintenance with each Salesforce release to ensure that all custom features work as it has been planned.

4) Creation of custom user training material and workshops.

6. APPLICATION

- We will take a look at the property management application which we will build in this course.

- We will learn the custom object which we will create for our property management application.

- We will learn about integrating authorize. Net payment gateway system with Salesforce in order to process the payments made by our renter.

7. CONCLUSION :

Develop an app for property management where buyer can order his requirement and get the appropriate details of property. Then finally create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased closed the deal.

8. FUTURE SCOPE

As the demand for any Salesforce job role is high, a certification equips you with specialized Salesforce requirements. The right Salesforce training props we ahead in a niche area where a scope for career growth and salary is sky-high.