

Project Report

PROPERTY MANAGEMENT APPLICATION

1. INTRODUCTION

1.1 Overview

Property management applications are software solutions designed to help property managers and landlords manage their properties more efficiently. These applications automate various aspects of property management, including rent collection, maintenance requests, tenant communication, accounting, and reporting.

Property management applications can be cloud-based, which means that users can access them from any device with an internet connection. This is particularly helpful for property managers who are constantly on the go and need to access information from multiple locations.

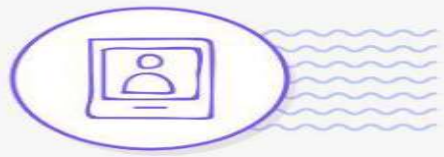
1.2 Purpose

The purpose of property management applications is to provide property managers and landlords with a software solution that can help them manage their rental properties more efficiently. These applications automate many aspects of property management, including rent collection, lease tracking, maintenance management, tenant communication, accounting, and reporting.

The ultimate goal of property management applications is to help property managers save time and money by streamlining routine tasks and providing easy access to important information. By automating many aspects of property management, property managers can focus on more strategic tasks that require human input, such as developing and implementing long-term plans for their properties.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

 [Share template feedback](#)



Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example](#) 



Build empathy

The information you add here should be representative of the observations and research you've done about your users.

Says

What have we heard them say?
What can we imagine them saying?

"They're not going to be able to afford to buy a house in the city, so they're going to have to move out."

"I'm not sure if they're going to be able to afford to buy a house in the city, so they're going to have to move out."

"They're not going to be able to afford to buy a house in the city, so they're going to have to move out."

"I'm not sure if they're going to be able to afford to buy a house in the city, so they're going to have to move out."

Property Management Application using salesforce

Thinks

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

They are looking for cheap, modern, free, great properties.

They want to live in the city, so they're going to have to move out.

They want to live in the city, so they're going to have to move out.

They want to live in the city, so they're going to have to move out.

They want to live in the city, so they're going to have to move out.

Property management application that can help them manage their properties and tenants.

They want to live in the city, so they're going to have to move out.

Example apps: OnCall, Buildium, Rent Manager, Property Boss

Many apps are available to help them manage their properties and tenants.

They want to live in the city, so they're going to have to move out.

They want to live in the city, so they're going to have to move out.

They want to live in the city, so they're going to have to move out.

They want to live in the city, so they're going to have to move out.

Does

What behavior have we observed?
What can we imagine them doing?

Feels

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?



2.2 Ideation & Brainstorming Map



Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

 **10 minutes** to prepare

 **1 hour** to collaborate

 **2-8 people** recommended



Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

 10 minutes

A

Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

B

Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.

C

Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#)



1

Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕒 5 minutes

PROBLEM

How might we [your problem statement]?



Key rules of brainstorming

To run an smooth and productive session



Stay in topic.



Encourage wild ideas.



Defer judgment.



Listen to others.



Go for volume.



If possible, be visual.

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

Person 1

They have a lot of experience in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.
They are very experienced in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.
They are very experienced in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.

Person 2

They are very experienced in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.
They are very experienced in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.
They are very experienced in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.

Person 3

They are very experienced in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.
They are very experienced in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.
They are very experienced in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.

Person 4

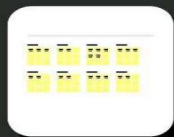
They are very experienced in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.
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They are very experienced in the field and are very knowledgeable about the current state of the industry.	They are very organized and detail-oriented.	They are very creative and think outside the box.

Person 5

Person 6

Person 7

Person 8



3

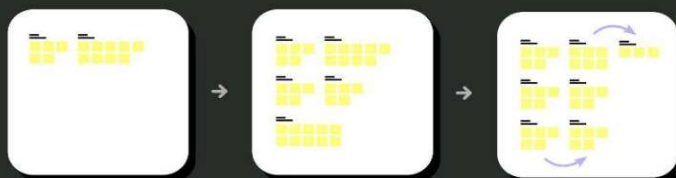
Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

🕒 20 minutes

TIP

Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mural.

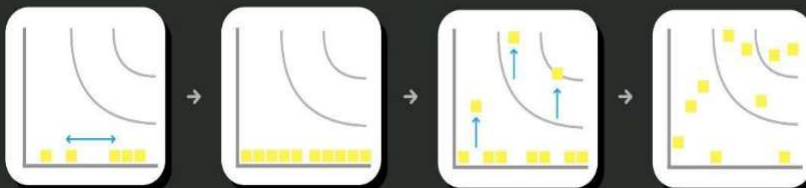


4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

20 minutes





After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

Quick add-ons

A

Share the mural

Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.

B

Export the mural

Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.

Keep moving forward



Strategy blueprint

Define the components of a new idea or strategy.

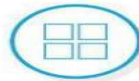
[Open the template →](#)



Customer experience journey map

Understand customer needs, motivations, and obstacles for an experience.

[Open the template →](#)



Strengths, weaknesses, opportunities & threats

Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.

[Open the template →](#)



[Share template feedback](#)

3. RESULT

3.1 Data Model:

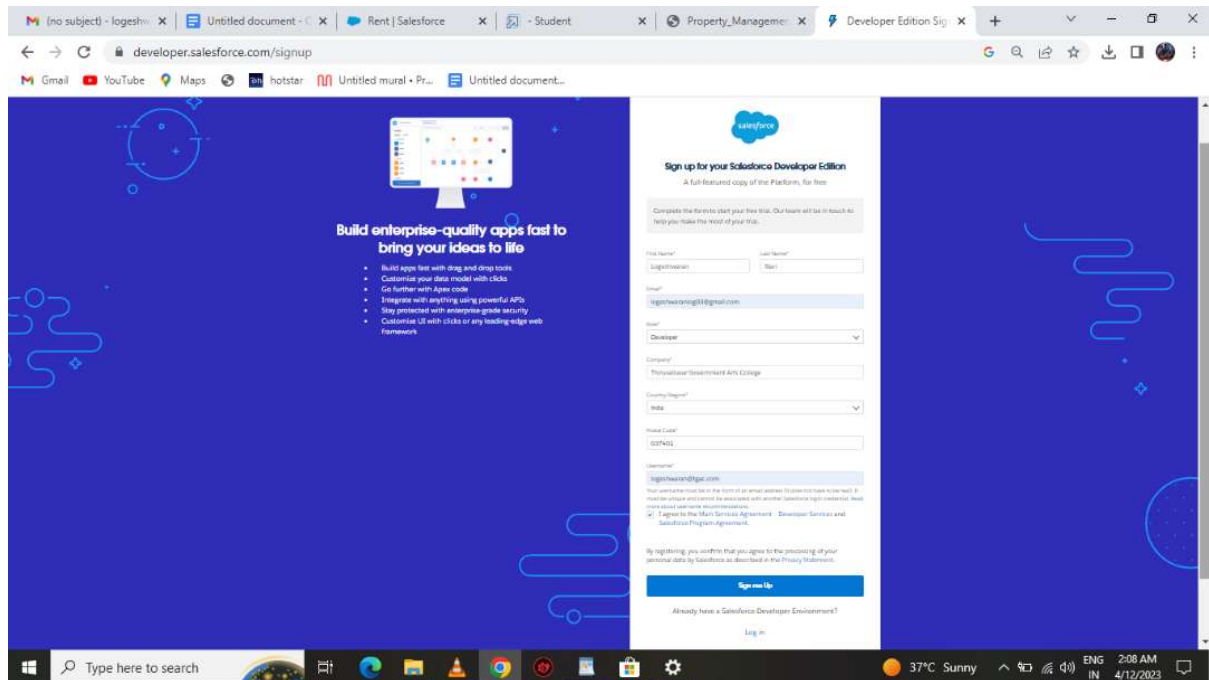
Object name	Fields in the Object
-------------	----------------------

Buy		
	Field label	Data type
	Annual amount	Text(25)
	Buy	Picklist (Multi-Select)
	Buy name	Text(80)
	city	Picklist (Multi-Select)
	Discount	Percent(18, 0)
	State	Picklist (Multi-Select)
Loan		
	Field label	Data type
	Annual loan	Number(7, 0)
	Interest rate	Currency(7, 2)
	Loan amount	Formula (Currency)
	Loan Id	Auto Number
	Loan Name	Text(80)
	Loan Repayment	Number(7, 0)
	Term	Number(5, 0)
	Total Loan Installments	Number(18, 0)
Rent		
	Field Label	Data type
	BHK type	Picklist (Multi-Select)
	Rent	Auto Number
	Rent name	Text(80)
	Rental city	Text(7)

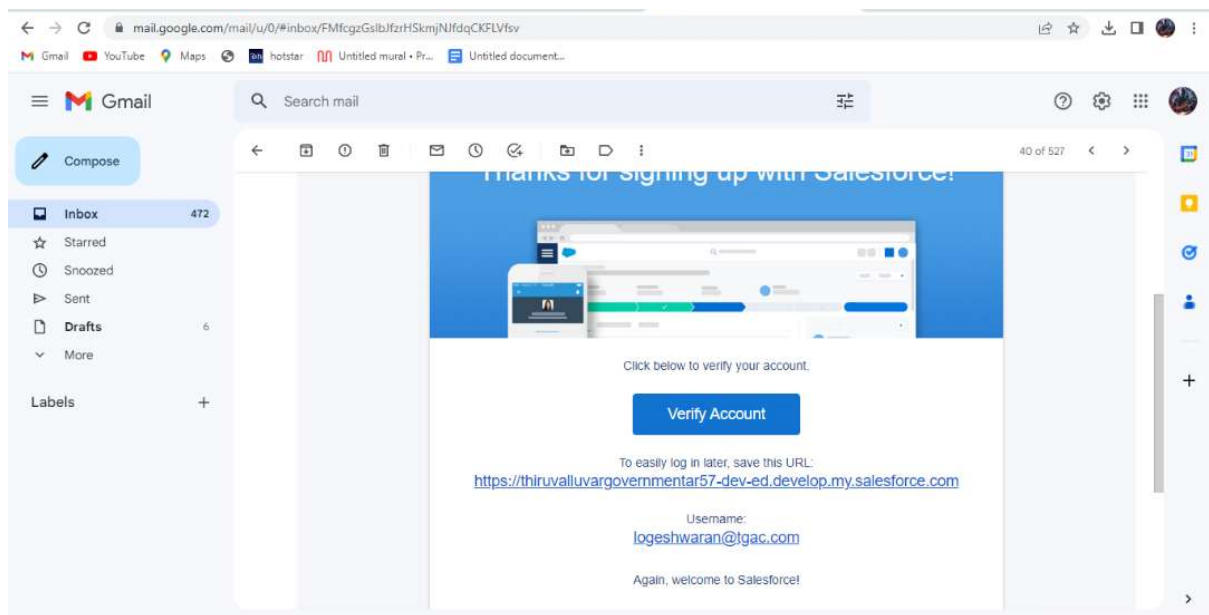
3.2 Activity & Screenshot

Milestone 1-Salesforce

Activity1: Creating Developer Account:



Activity 2 : Account Activation



Milestone 2- Object

Activity 1: Objects - To Navigate to setup page:

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

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.

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

Activity 2: Create Object Buy

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

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.

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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

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

Activity 2: Create Object Rent

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

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

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

Activity 2: Create Object Loan

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

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

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

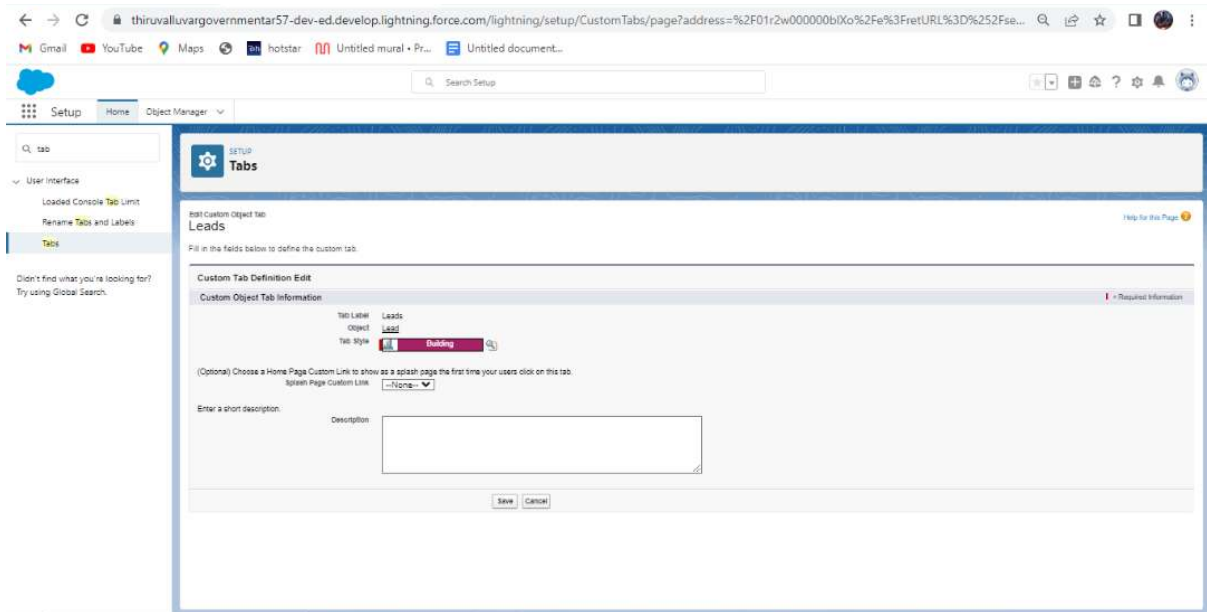
☒ Allow Reports

☐ Allow Activities

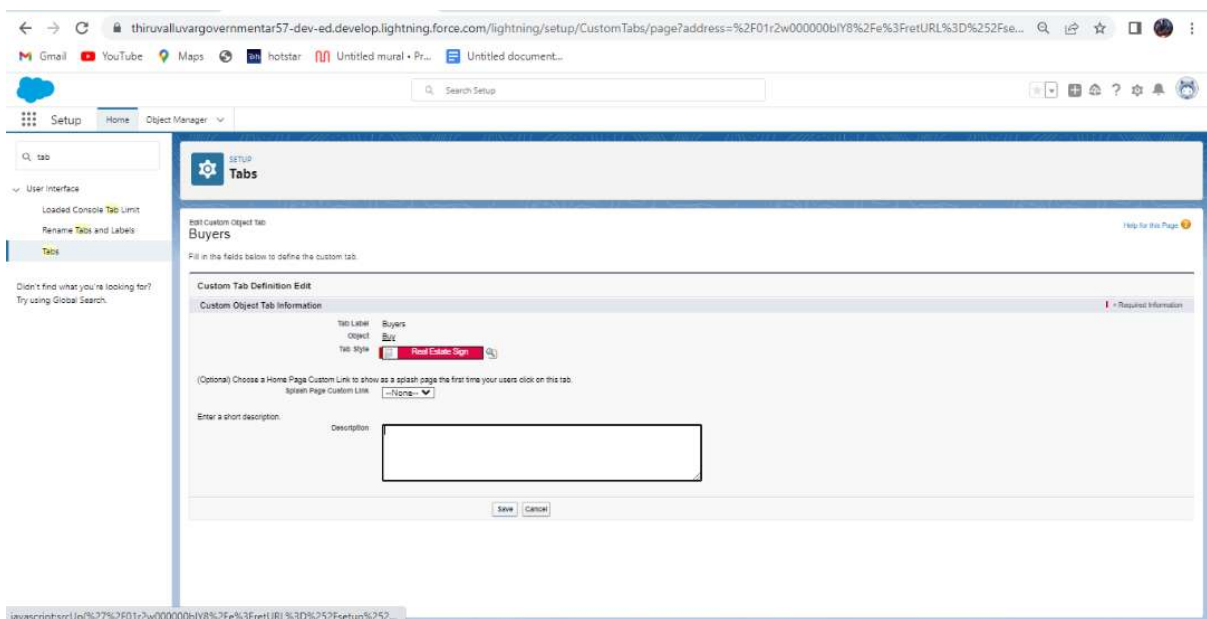
☐ Track Field History

Milestone 3 : Tab

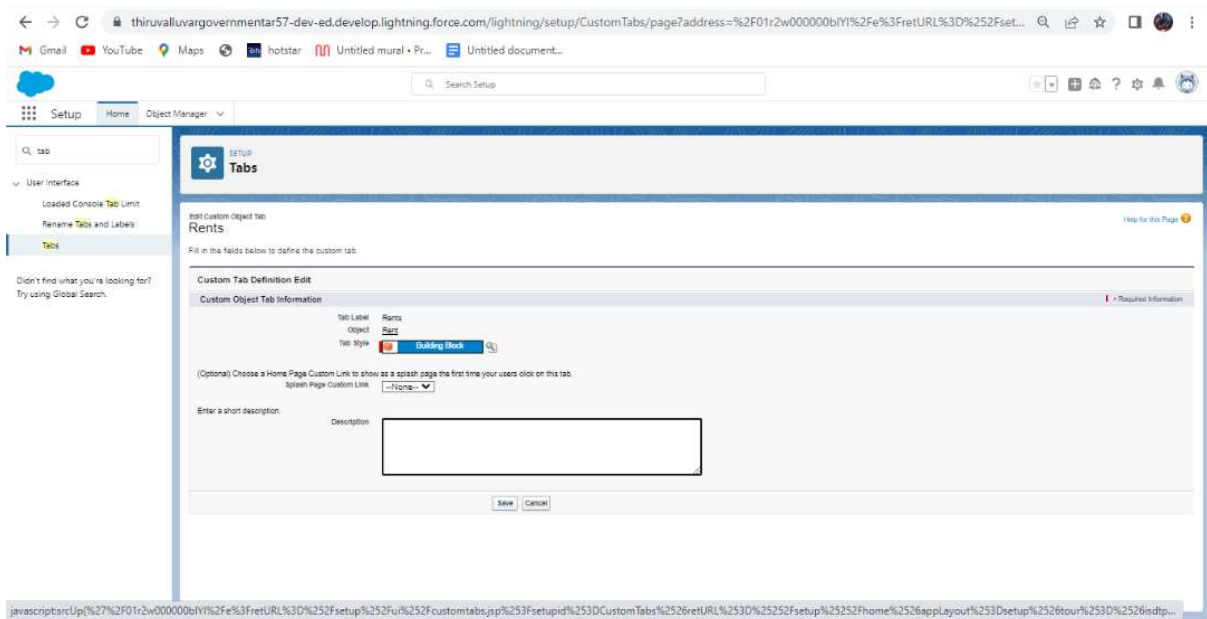
Activity 1: To create a Tab (Lead)



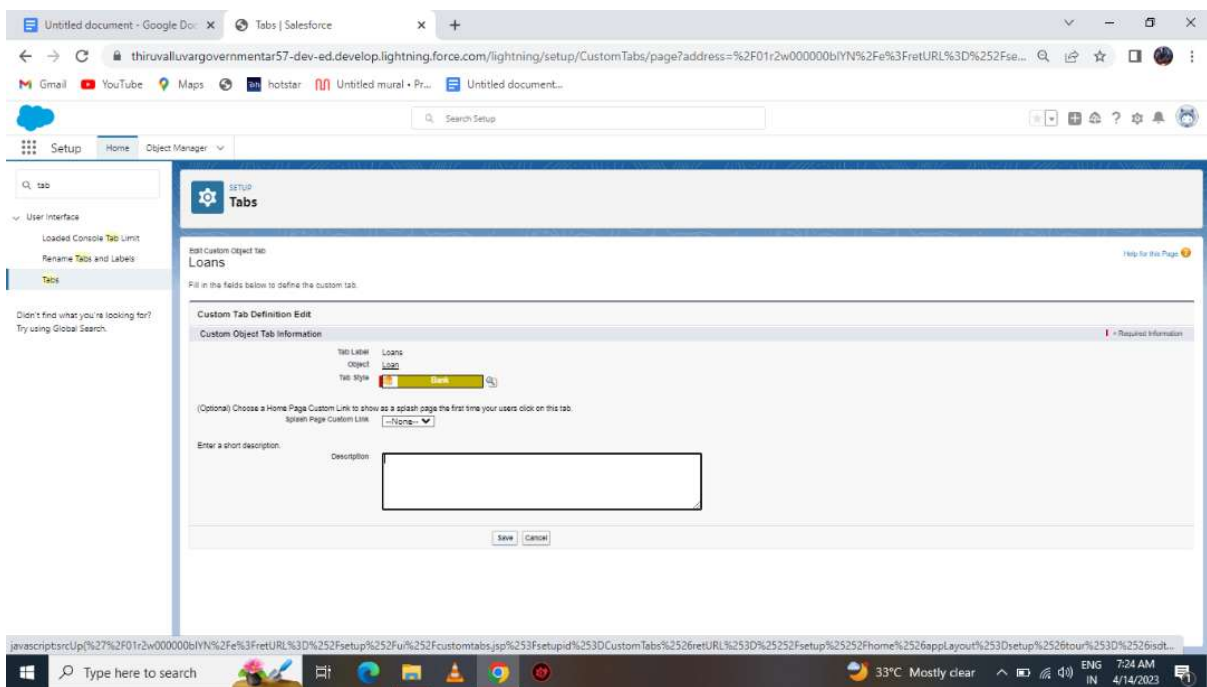
Activity 2: To create a Tab (Buy)



Activity 3: To create a Tab (Rent)



Activity 4: To create a Tab (Loan)



Milestone 4 : The Lightning App

Activity 1: Create the Lightning App

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenu/home

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning ☐ Disabled

29 items • Sorted by App Name • Filtered by All app namespaces - Tablet Type

App Name	Developer Name	Description	Last Modified	App Type	Visible
1 All Tabs	AllTabSet		16/03/2023, 12:30 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	16/03/2023, 12:30 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	16/03/2023, 12:30 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	16/03/2023, 12:33 pm	Lightning	✓
5 Chatter Desktop	Chatter_Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected to Chatter from o...	17/03/2023, 10:33 am	Connected (Managed)	
6 Chatter Mobile for BlackBerry	Chatter_for_BlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feeds, post updates an...	17/03/2023, 10:33 am	Connected (Managed)	
7 Community	Community	Salesforce CRM Communities	16/03/2023, 12:30 pm	Classic	✓
8 Content	Salesforce CRM Content	Salesforce CRM Content	16/03/2023, 12:30 pm	Classic	✓
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	16/03/2023, 12:30 pm	Lightning	✓
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	16/03/2023, 12:30 pm	Lightning	✓
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	16/03/2023, 12:30 pm	Lightning	✓

https://thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/one/one.app#/setup/NavigationMenu/home

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenu/home

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name

*Developer Name

Description


App Branding

Image

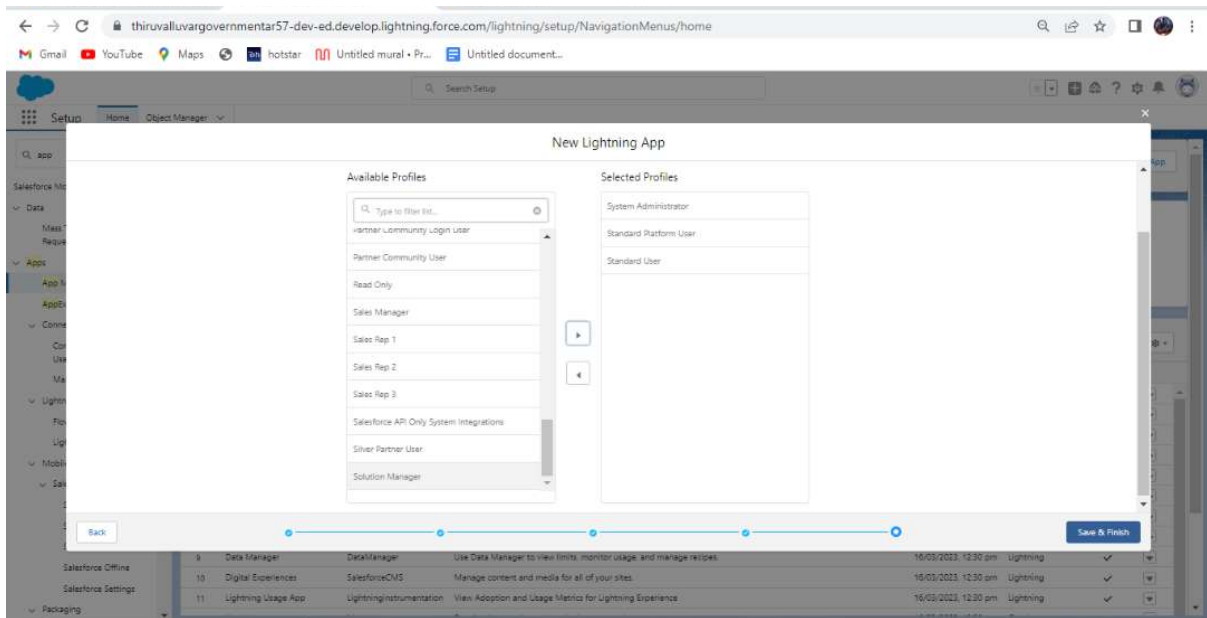
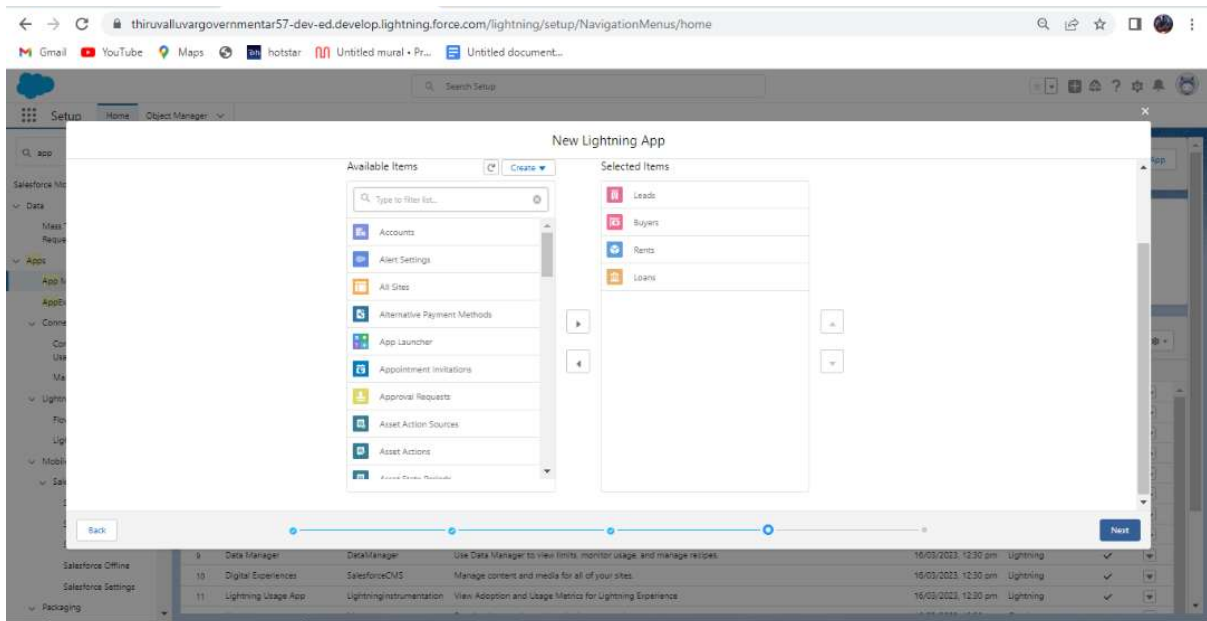
Primary Color Hex Value

Org Theme Options ☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

 Property Management

9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	16/03/2023, 12:30 pm	Lightning	✓
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	16/03/2023, 12:30 pm	Lightning	✓
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	16/03/2023, 12:30 pm	Lightning	✓



Milestone 5 : Fields

Activity 1: Create the Lead Field

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RUVt/FieldsAndRelationships/page?address=%2F0...

Setup Home Object Manager

Lead

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 Field Definition Edit

Field Information

Field Label: Lead

Field Name: Lead

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

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

Auto Number Options

Auto Number Display Format: 000000

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RUVt/FieldsAndRelationships/page?address=%2F0...

Setup Home Object Manager

Lead

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 Field Definition Edit

Field Information

Field Label: State

Field Name: State

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

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

Default Value: [Show Formula Editor](#)

Picklist (Multi-Select) Options

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RUVt/FieldsAndRelationships/page?address=%2F0...

Setup > OBJECT MANAGER

Lead

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 Field Definition Edit

Field Information

Field Label: City

Field Name: City

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PI, HIPAA, OCP, PCI

Chosen:

General Options

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

Default Value: [Show Formula Editor](#)

Help for this Page

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RUVt/FieldsAndRelationships/page?address=%2F0...

Setup > OBJECT MANAGER

Lead

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 Field Definition Edit

Field Information

Field Label: Email

Field Name: Email

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PI, HIPAA, OCP, PCI

Chosen:

General Options

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

Unique: ☐ Do not allow duplicate values

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

Default Value: [Show Formula Editor](#)

Help for this Page

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RUVt/FieldsAndRelationships/page?address=%2F0...

Setup Home Object Manager

Lead

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 Field Definition Edit

Field Information

Field Label: Phone

Field Name: Phone

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

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

Default Value: Show Formula Editor

Help for this Page

Activity 2 : Create Field for Buy

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFBt/FieldsAndRelationships/page?address=%2F0...

Setup Home Object Manager

Buy

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 Field Definition Edit

Field Information

Field Label: Buy

Field Name: Buy

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

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

Default Value: Show Formula Editor

Picklist (Multi-Select) Options

Select picklist to the cell as defined in the cell set

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFBi/FieldsAndRelationships/page?address=%2FD0...

Setup > OBJECT MANAGER

Buy

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 Buy Custom Field

Discount

Custom Field Definition Edit

Field Information

Field Label: Discount

Field Name: Discount

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

Data Type: Percent

General Options

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

Default Value: Show Formula Editor

Percent Options

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFBi/FieldsAndRelationships/page?address=%2FD0...

Setup > OBJECT MANAGER

Buy

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 Buy Custom Field

State

Custom Field Definition Edit

Field Information

Field Label: State

Field Name: State

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

Data Type: Picklist (Multi-Select)

General Options

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

Default Value: Show Formula Editor

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFBs/FieldsAndRelationships/page?address=%2F0...

Setup > OBJECT MANAGER

Rent

Details: Fields & Relationships

Custom Field Definition Edit

Field Information

Field Label: Rental City

Field Name: Rental_City

Description: Change

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

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

Unique: ☐ Do not allow duplicate values

☐ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

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

Default Value: Show Formula Editor

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFBs/FieldsAndRelationships/page?address=%2F0...

Setup > OBJECT MANAGER

Rent

Details: Fields & Relationships

Custom Field Definition Edit

Field Information

Field Label: BHK type

Field Name: BHK_type

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

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

Default Value: Show Formula Editor

Activity 4 : Create Field for Loan

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFC2/FieldsAndRelationships/page?address=%2F0...

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

Custom Field Definition Edit

Field Information

Field Label: Data Type: Auto Number

Field Name:

Description:

Help Text:

Data Owner:

Field Usage:

Data Sensitivity Level:

Compliance Categorization

Available:

Chosen:

General Options

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

Auto Number Options

Auto Number Display Format:

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFC2/FieldsAndRelationships/page?address=%2F0...

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

Custom Field Definition Edit

Field Information

Field Label: Data Type: Currency

Field Name:

Description:

Help Text:

Data Owner:

Field Usage:

Data Sensitivity Level:

Compliance Categorization

Available:

Chosen:

General Options

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

Default value:

Use Formula Editor:

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFC2/FieldsAndRelationships/page?address=%2F0...

Setup Home 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

Custom Field Definition Edit

Field Information

Field Label: Term

Field Name: term

Description: 200000

Help Text:

Data Owner: User

Field Usage: None

Data Sensitivity Level: None

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

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

Unique: ☐ Do not allow duplicate values

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

AI Prediction: ☐ Use this field to store AI prediction scores

Default value: [Open Formula Editor](#)

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFC2/FieldsAndRelationships/page?address=%2F0...

Setup Home 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

Custom Field Definition Edit

Field Information

Field Label: Annual Loan

Field Name: annual_loan

Description: 1000000

Help Text:

Data Owner: User

Field Usage: None

Data Sensitivity Level: None

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

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

Unique: ☐ Do not allow duplicate values

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

AI Prediction: ☐ Use this field to store AI prediction scores

Default value: [Open Formula Editor](#)

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFC2/FieldsAndRelationships/page?address=%2F0...

Setup Home 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 Loan Custom Field

Total Loan Installments

Custom Field Definition Edit

Field Information

Field Label Total Loan Installments

Field Name Total Loan Installments

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization

Available

PI

HIPAA

GDPR

PCI

Chosen

General Options

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

Unique ☐ Do not allow duplicate values

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

AI Prediction ☐ Use this field to store AI prediction scores

Default Value Show Formula Editor

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RFC2/FieldsAndRelationships/page?address=%2F0...

Setup Home 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 Loan Custom Field

Loan Repayment

Custom Field Definition Edit

Field Information

Field Label Loan Repayment

Field Name Loan Repayment

Description 1200000

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization

Available

PI

HIPAA

GDPR

PCI

Chosen

General Options

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

Unique ☐ Do not allow duplicate values

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

AI Prediction ☐ Use this field to store AI prediction scores

Default Value Show Formula Editor

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003RfC2/FieldsAndRelationships/page?address=%2F0...

Setup Home 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 Loan Custom Field
Loan Amount

Custom Field Definition Edit

Field Information

Field Label: Loan Amount

Field Name: Loan_Amount

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PI, HIPAA, GDPR, PCI

Chosen:

Formula Options

Formula Return Type: Currency

Decimal Places: 2

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: (Gross_Margin__Amount - Cost__c) More Examples...

Simple Formula | Advanced Formula

Quick Tips
Getting Started
Operators & Functions

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003RfC2/FieldsAndRelationships/page?address=%2F0...

Setup Home 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

Formula Options

Formula Return Type: Currency

Decimal Places: 2

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: (Gross_Margin__Amount - Cost__c) More Examples...

Simple Formula | Advanced Formula

Insert Fields

Insert Operator

Functions

All Function Categories

ABS

ACOS

ADDMONTHS

AND

ASIN

ASIN

Insert Selected Function

Check Syntax

Loan_Amount__Currency__c * (((1 + (Interest_Rate__c / 32)) ^ Term__c - 1) / ((Interest_Rate__c / 32) * (1 + (Interest_Rate__c / 32)) ^ Term__c))

Milestone 6 : Profile

Activity 1 : To create a new profile

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w00000wrL%2Fe%3FretURL%3D%2...

Search Setup

Setup Home Object Manager

Search: profil

Users Profiles

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

Profiles

Profile Edit: Marketing Executive 1 and Executive 2

Set the permissions and page layouts for this profile.

Profile Edit: Name: Marketing Executive 1 and Executive 2, User License: Salesforce Platform, Custom Profile: ☒

Custom App Settings:

	Visible	Default		Visible	Default
Analytics Studio (standard__Analytics)	<input type="checkbox"/>	<input type="radio"/>	Property Management (Property_Management)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	Property Management (Property_Management2)	<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"/>

Connected App Access:

Chatter Desktop	<input type="checkbox"/>	Salesforce Files	<input type="checkbox"/>
Chatter Mobile for BlackBerry	<input type="checkbox"/>	Salesforce for Android	<input type="checkbox"/>
Salesforce	<input type="checkbox"/>	Salesforce for iOS	<input type="checkbox"/>
Salesforce Chatter	<input type="checkbox"/>		

Service Provider Access

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w00000wrM%2Fe%3FretURL%3D%2...

Search Setup

Setup Home Object Manager

Search: profil

Users Profiles

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

Profiles

Profile Edit: Marketing Manager

Set the permissions and page layouts for this profile.

Profile Edit: Name: Marketing Manager, User License: Salesforce Platform, Custom Profile: ☒

Custom App Settings:

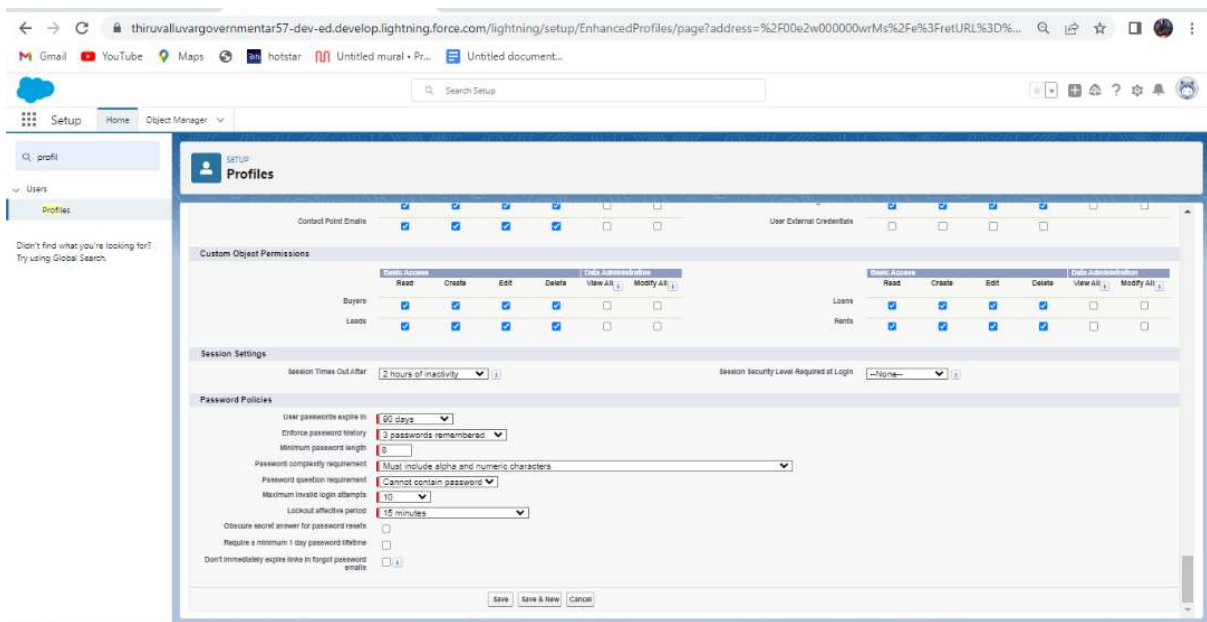
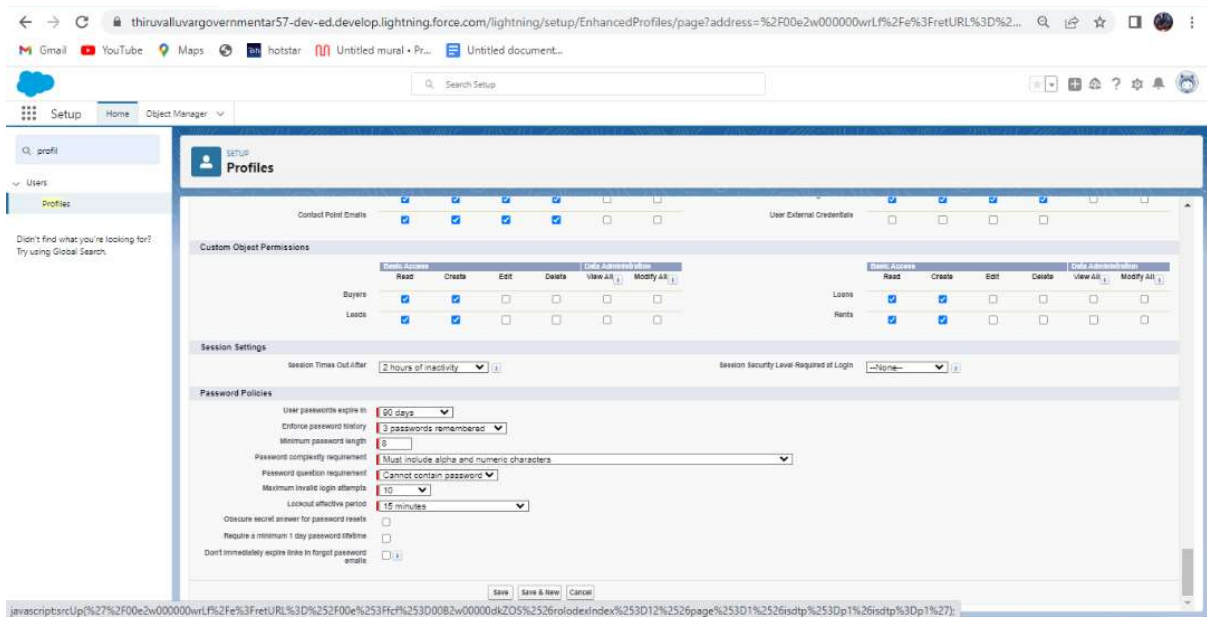
	Visible	Default		Visible	Default
Analytics Studio (standard__Analytics)	<input type="checkbox"/>	<input type="radio"/>	Property Management (Property_Management)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	Property Management (Property_Management2)	<input type="checkbox"/>	<input type="radio"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

Connected App Access:

Chatter Desktop	<input type="checkbox"/>	Salesforce Files	<input type="checkbox"/>
Chatter Mobile for BlackBerry	<input type="checkbox"/>	Salesforce for Android	<input type="checkbox"/>
Salesforce	<input type="checkbox"/>	Salesforce for iOS	<input type="checkbox"/>
Salesforce Chatter	<input type="checkbox"/>		

Service Provider Access

Activity 2 : Create Marketing



Activity 3 : Sales

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000wrlb%2Fe%3FretURL%3D%2...

Search Setup

Setup Home Object Manager

Q: profil

Users Profiles

Profile Edit

Name Sales Manager

User License Salesforce

Description

Custom Profile ☒

Custom App Settings

	Visible	Default		Visible	Default
All Tools (standard__AllTools)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Guest Management (standard__GuestManagement)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Analytics)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Console (standard__SalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bot Solutions (standard__LightningBot)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Chatbot (standard__Chatbot)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCX)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Site.com (standard__Site)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

Required Information

thiruvalluvgovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000wuiT%2Fe%3FretURL%3D%2...

Search Setup

Setup Home Object Manager

Q: profil

Users Profiles

Profile Edit

Name Sales Rep 1

User License Salesforce Platform

Description

Custom Profile ☒

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Analytics)	<input type="checkbox"/>	<input type="checkbox"/>	Property Management (Property_Management)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="checkbox"/>	Property Management (Property_Management2)	<input type="checkbox"/>	<input type="checkbox"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="checkbox"/>

Connected App Access

Chatter Desktop	<input type="checkbox"/>	Salesforce Files	<input type="checkbox"/>
Chatter Mobile for BlackBerry	<input type="checkbox"/>	Salesforce for Android	<input type="checkbox"/>
Salesforce.com	<input type="checkbox"/>	Salesforce for iOS	<input type="checkbox"/>
Salesforce Chatter	<input type="checkbox"/>		

Service Provider Access

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000wuza%2Fe%3FretURL%3D%2...

Setup Home Object Manager

Search Setup

Q: profile

Users

Profiles

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

Profiles

Profile Edit Sales Rep 2

Set the permissions and page layouts for this profile.

Profile Edit

Name: Sales Rep 2

User License: Identity

Description:

Custom Profile: ☒

Custom App Settings

	Visible	Default
All Tools (standard__AllToolSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Analytics)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bot Solutions (standard__LightningBot)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceOM)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningUsageApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Site.com (standard__Site)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000wv0S%2Fe%3FretURL%3D%2...

Setup Home Object Manager

Search Setup

Q: profile

Users

Profiles

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

Profiles

Profile Edit Sales Rep 3

Set the permissions and page layouts for this profile.

Profile Edit

Name: Sales Rep 3

User License: Identity

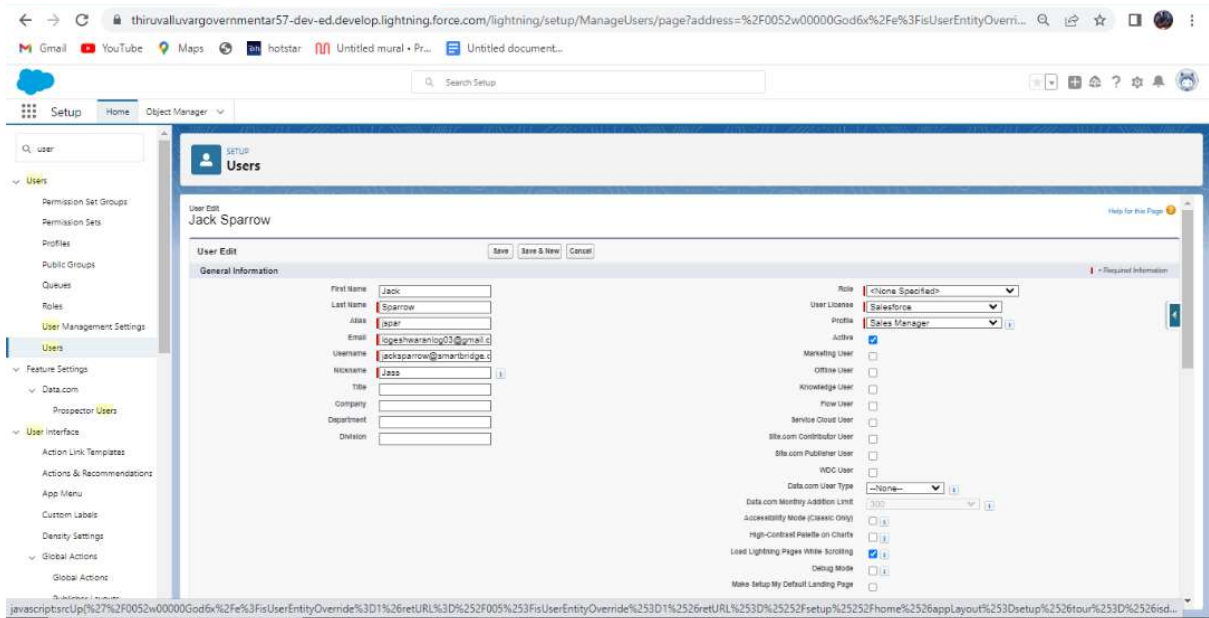
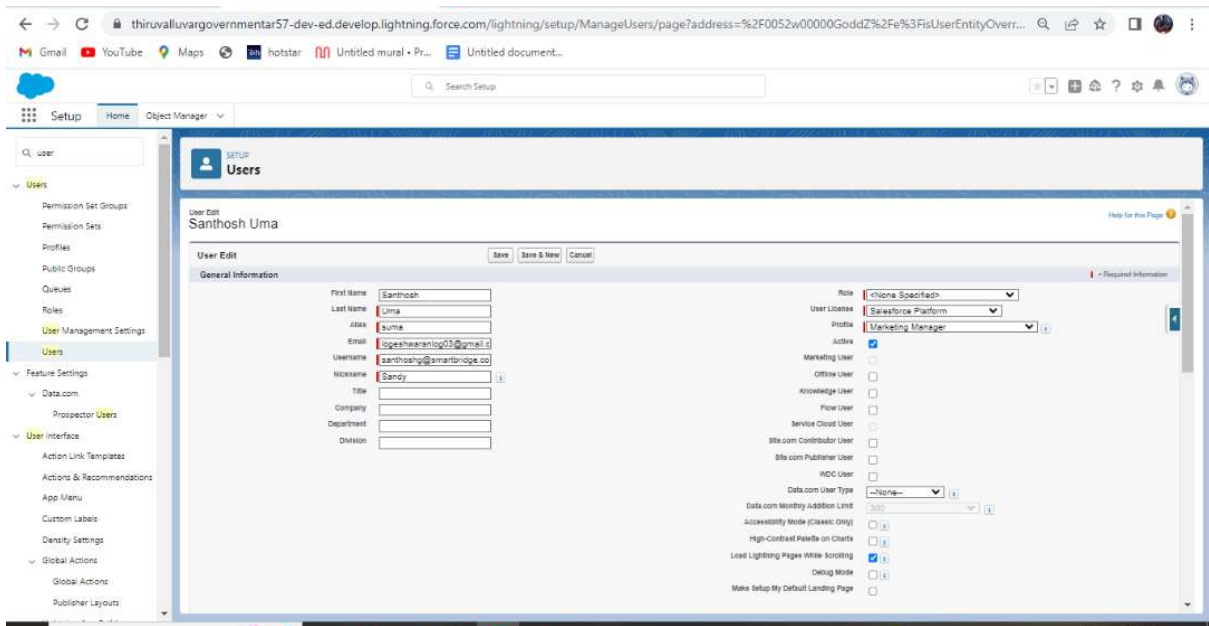
Description:

Custom Profile: ☒

Custom App Settings

	Visible	Default
All Tools (standard__AllToolSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Analytics)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bot Solutions (standard__LightningBot)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceOM)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningUsageApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Site.com (standard__Site)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Milestone 7 : New User



thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000Fu3Xm%2Fe%3FisUserEntityOverr...

Search Setup

Setup Home Object Manager

Q user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

Users

User Edit Logeshwaran Ravi

General Information

First Name: Logeshwaran

Last Name: Ravi

Alias: L.Ravi

Email: logeshwaranlog03@gmail.com

Username: logeshwaran@qad.com

Nickname: User167865004515564315

Title:

Company: Thiruvalluvar Government

Department:

Division:

Role: <None Specified>

User License: Salesforce

Profile: System Administrator

Active: ☒

Marketing User: ☒

Offline User: ☒

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☒

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Data.com User Type: --None--

Data.com Monthly Addition Limit: 300

Accessibility Mode (Classic Only): ☐

High-Contrast Palette on Charts: ☐

Load Lightning Pages While Scrolling: ☒

Debug Mode: ☐

Send Apex Warning Emails: ☐

Make Setup My Default Landing Page: ☒

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000GodC3%2Fe%3FisUserEntityOverr...

Search Setup

Setup Home Object Manager

Q user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

Users

User Edit Ajith Kumar

General Information

First Name: Ajith

Last Name: Kumar

Alias: akuma

Email: logeshwaranlog03@gmail.com

Username: ajith@amarabridge.com

Nickname: Ak

Title:

Company:

Department:

Division:

Role: <None Specified>

User License: Salesforce Platform

Profile: Marketing Executive 1 and Executive 2

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Data.com User Type: --None--

Data.com Monthly Addition Limit: 300

Accessibility Mode (Classic Only): ☐

High-Contrast Palette on Charts: ☐

Load Lightning Pages While Scrolling: ☒

Debug Mode: ☐

Send Apex Warning Emails: ☐

Make Setup My Default Landing Page: ☐

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000GoiE1%2Fe%3FisUserEntityOverri...

Search Setup

Setup Home Object Manager

Users

User Edit: Prabakaran Perumal

User Edit: Save Save & New Cancel

General Information

First Name: Prabakaran
Last Name: Perumal
Alias: pperu
Email: ggeshwarentoy03@gmail.com
Username: praba@smarbridge.com
Nickname: Prabas
Title:
Company:
Department:
Division:

Role: Chona Spoolfash
User License: Identity
Profile: Sales Rep 2
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service Cloud User: ☐
Site.com Contributor User: ☐
Site.com Publisher User: ☐
WDC User: ☐
Data.com User Type: --None--
Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only): ☐
High-Contrast Palette on Charts: ☐
Load Lightning Pages While Scrolling: ☒
Debug Mode: ☐

javascriptsrcUp(%27%2F0052w00000GoiE1%2Fe%3FisUserEntityOverride%3D1%26retURL%3D%252F005%253FisUserEntityOverride%253D1%2526retURL%253D%252F2setup%252FHome%2526appLayout%253Dsetup%2526tour%253D%2526sd...

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000GodrU%2Fe%3FisUserEntityOverri...

Search Setup

Setup Home Object Manager

Users

User Edit: Pradeep GM

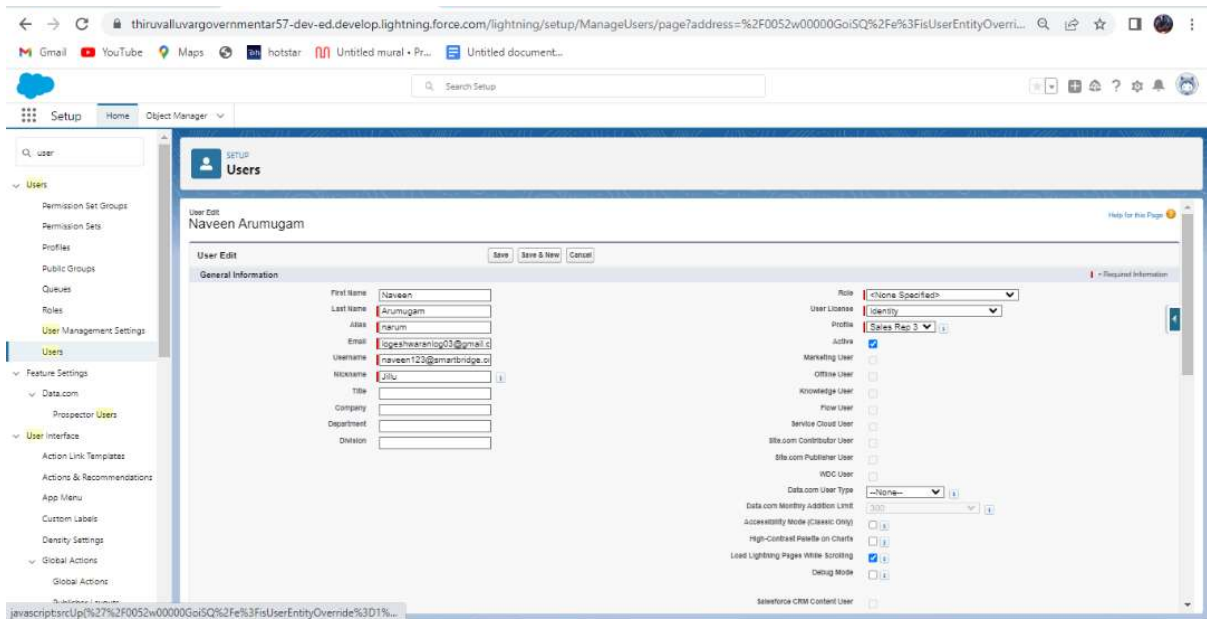
User Edit: Save Save & New Cancel

General Information

First Name: Pradeep
Last Name: GM
Alias: pgm
Email: ggeshwarentoy03@gmail.com
Username: pradeep@smarbridge.com
Nickname: Pradhees
Title:
Company:
Department:
Division:

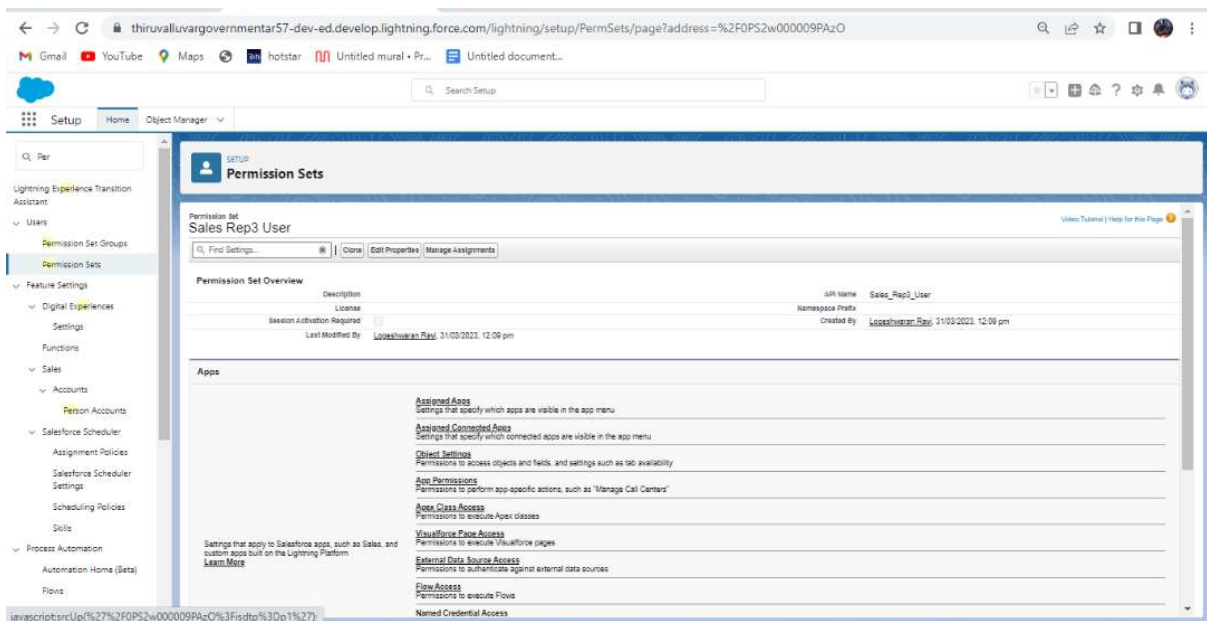
Role: Chona Spoolfash
User License: Salesforce Platform
Profile: Sales Rep 1
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service Cloud User: ☐
Site.com Contributor User: ☐
Site.com Publisher User: ☐
WDC User: ☐
Data.com User Type: --None--
Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only): ☐
High-Contrast Palette on Charts: ☐
Load Lightning Pages While Scrolling: ☒
Debug Mode: ☐
Make Setup My Default Landing Page: ☐

javascriptsrcUp(%27%2F0052w00000GodrU%2Fe%3FisUserEntityOverride%3D1%26retURL%3D%252F005%253FisUserEntityOverride%253D1%2526retURL%253D%252F2setup%252FHome%2526appLayout%253Dsetup%2526tour%253D%2526sd...



Milestone 8 : Permission Set

Activity 1 : Create the Permission Sets



thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS2w000009PAzO/PermissionSetAssignment/home

Setup Home Object Manager

Search Setup

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

Scheduling Policies

Skills

Process Automation

Automation Home (Beta)

Flows

Migrate to Flow

Sales Rep3 User

Current Assignments

Full Name	Active	Role	Profile	User License	Expires On
<input type="checkbox"/> Ajith Kumar	<input checked="" type="checkbox"/>		Marketing Executive 1 and Executive 2	Salesforce Platform	
<input type="checkbox"/> Jack Sparrow	<input checked="" type="checkbox"/>		Sales Manager	Salesforce	
<input type="checkbox"/> Loganathan Ravi	<input checked="" type="checkbox"/>		System Administrator	Salesforce	
<input type="checkbox"/> Narveen Arumugam	<input checked="" type="checkbox"/>		Sales Rep 3	Identity	
<input type="checkbox"/> Prakashan Sarunai	<input checked="" type="checkbox"/>		Sales Rep 2	Identity	
<input type="checkbox"/> Pradeep GM	<input checked="" type="checkbox"/>		Sales Rep 1	Salesforce Platform	
<input type="checkbox"/> Santhosh Uma	<input checked="" type="checkbox"/>		Marketing Manager	Salesforce Platform	

Add Assignment

Milestone 9 : Setup for OWD

Activity 1 : Create OWD Setting

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Setup Home Object Manager

Search Setup

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

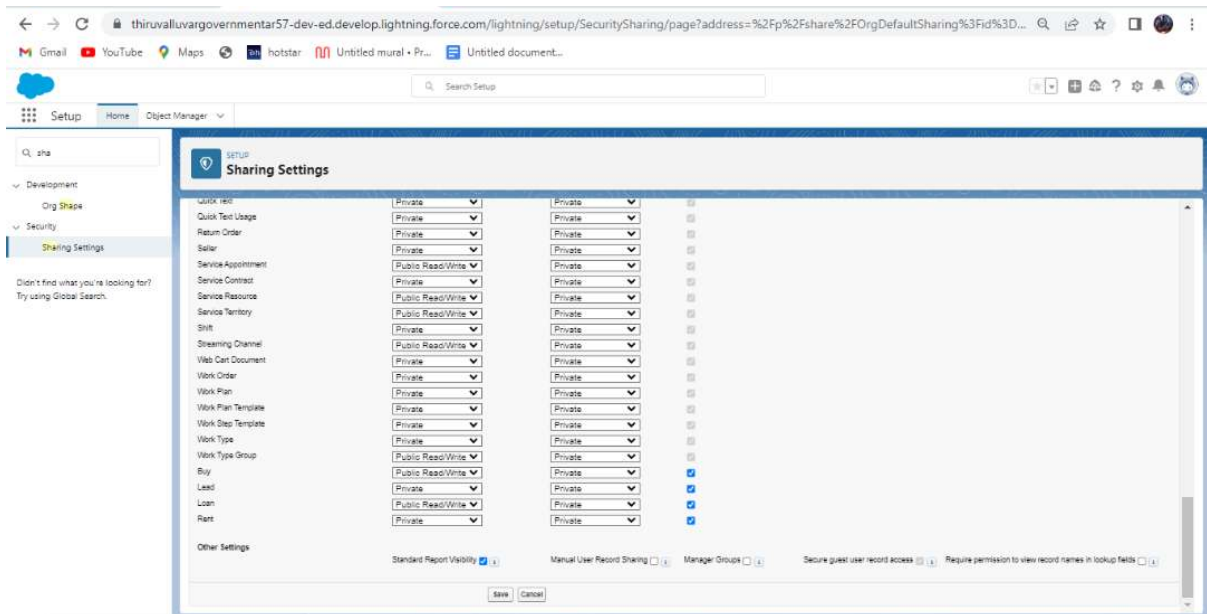
Manage sharing settings for: All Objects

Create External Sharing Model

Default Sharing Settings

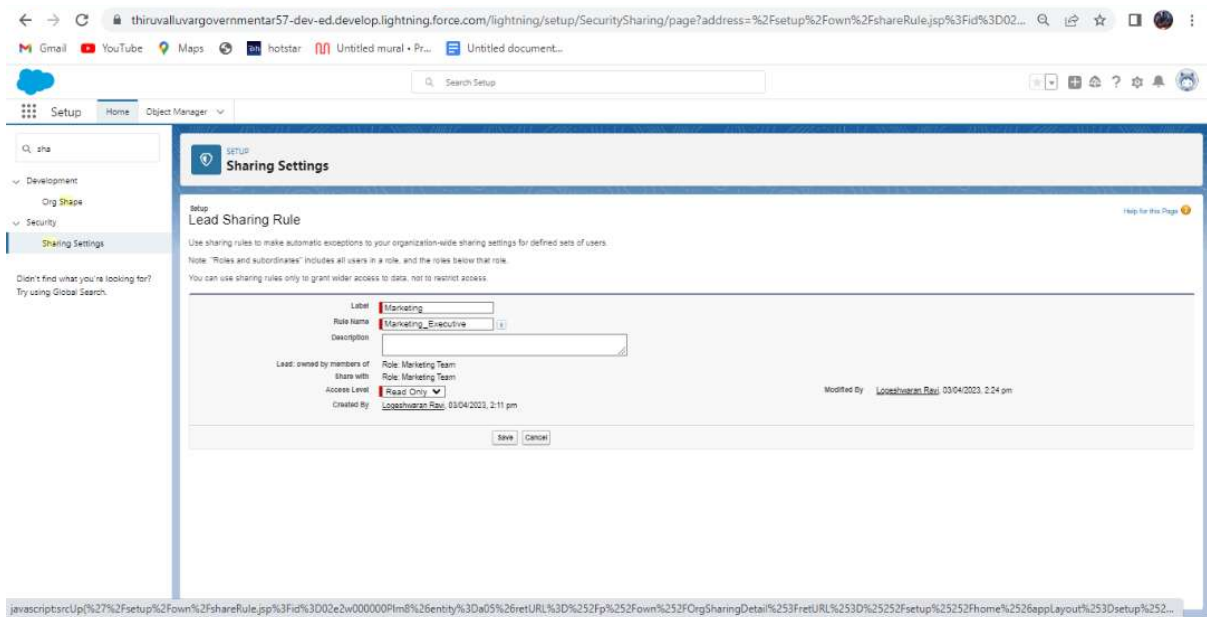
Object	Default Internal Access	Default External Access	Grant access using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Activity	Private	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	Use	<input checked="" type="checkbox"/>
Product	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Product of	Public Read/Write	Private	<input checked="" type="checkbox"/>

Organization-Wide Defaults Help

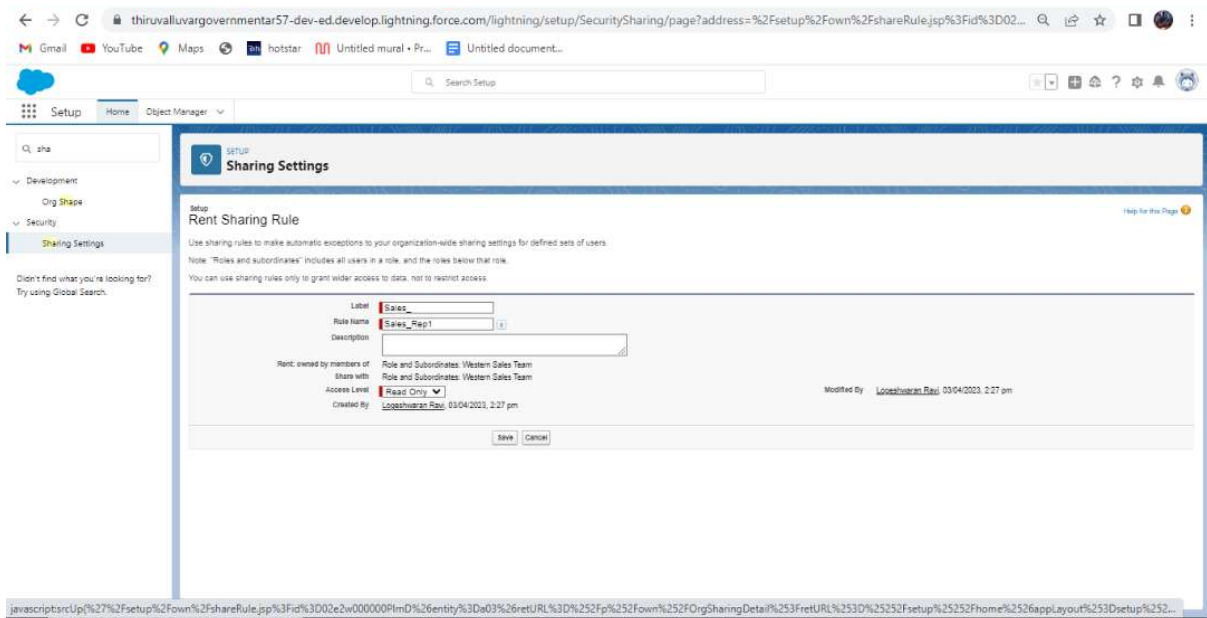
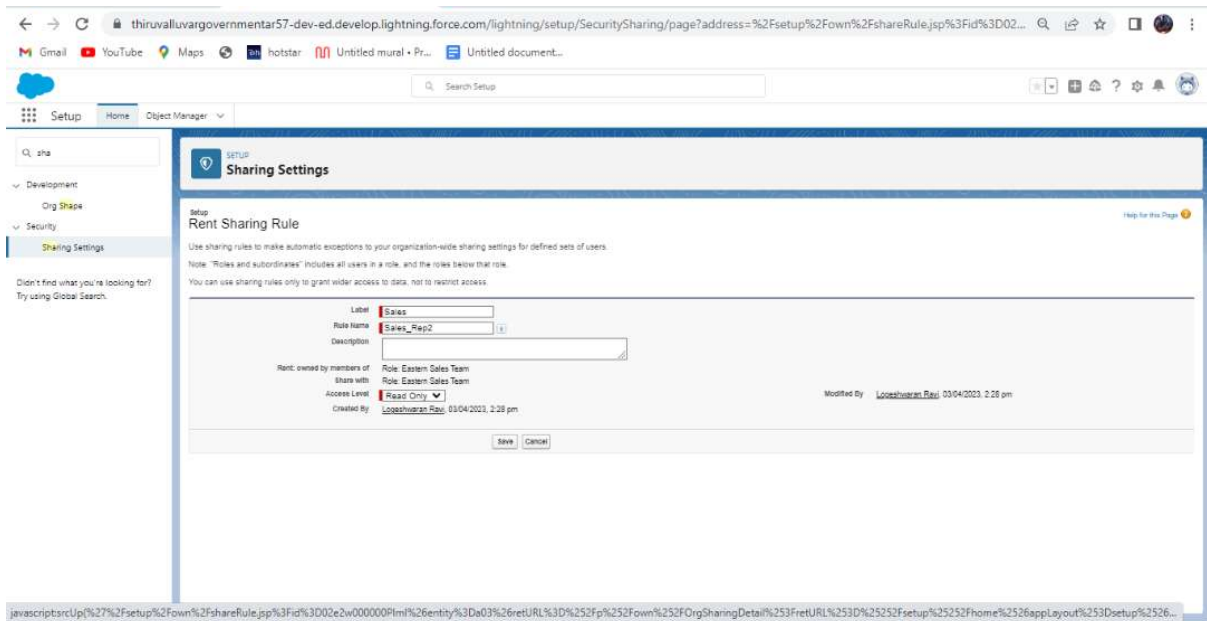


Activity 2:

Marketing :



Sales :



Milestone 10 : Report

Activity 1 : Create Report

thiruvalluvargovernmentar57-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w0000EOAF3EAP/view

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

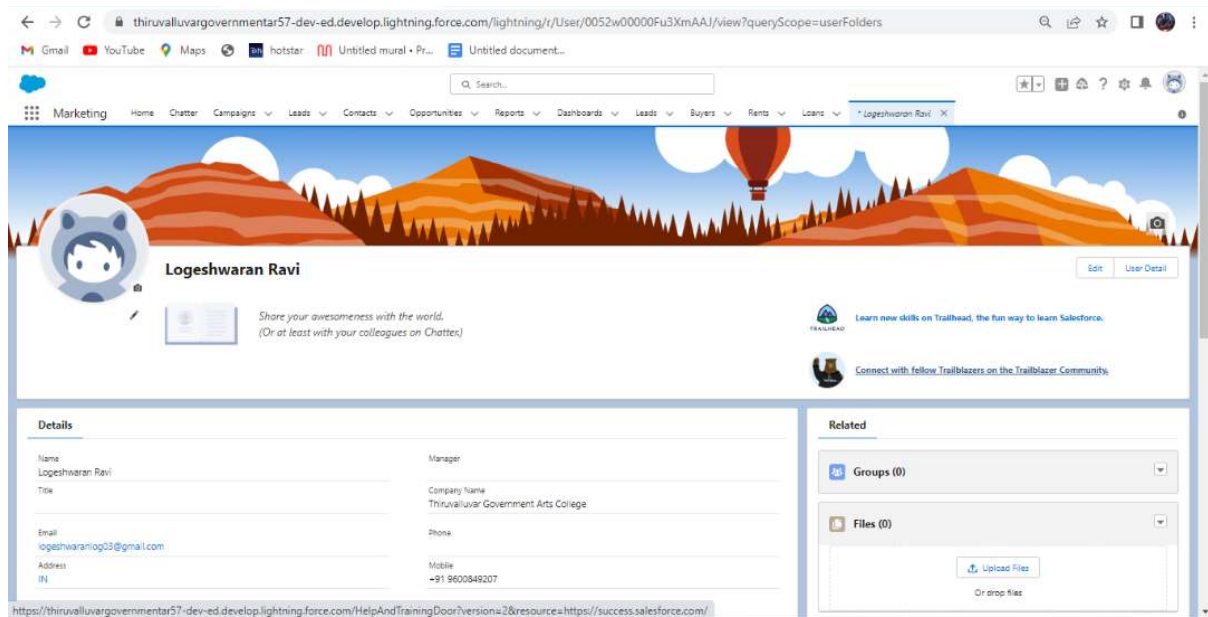
Report: Leads
Logeshwaran.R

Total Records: 22

	First Name	Last Name	Title	Company / Account	Email	Lead Source	Street	Rating	Lead Owner
1	Bertha	Boyer	Director of Vendor Relations	Farmers Coop. of Florida	bertha@fcot.net	Web	321 Westcott Building	Hot	Logeshwaran Ravi
2	Phyllis	Cotton	CFO	Abbott Insurance	pcotton@abbottins.net	Web	-	-	Logeshwaran Ravi
3	Jeff	Dimpsey	SVP, Procurement	Jackson Controls	jeff@jackson.com	Phone Inquiry	-	-	Logeshwaran Ravi
4	Mike	Braund	VP, Technology	Metropolitan Health Services	mbraun@metro.com	Purchased List	-	-	Logeshwaran Ravi
5	Pat	Stumfuler	SVP, Administration and Finance	Pyramid Construction Inc.	pat@pyramid.net	Phone Inquiry	-	-	Logeshwaran Ravi
6	Patricia	Feager	CEO	International Shipping Co.	patricia_feager@i.com	Partner Referral	-	-	Logeshwaran Ravi
7	Brenda	Miculate	CFO	Cardinal Inc.	brenda@cardinal.net	Web	-	-	Logeshwaran Ravi
8	Violet	Macloed	VP, Finance	Emerson Transport	violetm@emersontransport.com	Phone Inquiry	-	-	Logeshwaran Ravi
9	Andy	Young	SVP, Operations	Dickerson plc	a_young@dickerson.com	Purchased List	-	-	Logeshwaran Ravi
10	Kathy	Snyder	Regional General Manager	TNR Corp.	kayrider@tnr.net	Purchased List	-	-	Logeshwaran Ravi
11	Kristen	Allen	Director, Warehouse Mgmt	Asthma Home Products	kallen@asthahome.com	Partner Referral	-	-	Logeshwaran Ravi
12	David	Monaco	CFO	Blues Entertainment Corp.	david@blues.com	Purchased List	-	-	Logeshwaran Ravi
13	Carolyn	Crenshaw	VP, Technology	Ace Iron and Steel Inc.	carolyn@aces.com	Phone Inquiry	-	-	Logeshwaran Ravi
14	Jack	Rogers	VP, Facilities	Burlington Textiles Corp of America	jrogers@btca.com	Web	325 S. Lexington Ave	Warm	Logeshwaran Ravi
15	Bill	Dadio Jr	CFO	Zenith Industrial Partners	bill_dadio@zenith.com	Web	-	-	Logeshwaran Ravi
16	Tom	Jemas	SVP, Production	Delphi Chemicals	tom.jemas@delphi-chemicals.com	Web	-	-	Logeshwaran Ravi
17	Eugene	Lucie	CEO	Pacific Retail Group	elucie@pacrfretail.com	Purchased List	-	-	Logeshwaran Ravi
18	Shelly	Brownell	SVP, Technology	Western Telecommunications Corp.	shelly@westerntelecom.com	Partner Referral	-	-	Logeshwaran Ravi

Milestone 11 : Dashboards

Activity 1 : Create Dashboards



4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/lravi48>

Team Member 1- <https://trailblazer.me/id/prabp16>

Team Member 2- <https://trailblazer.me/id/navea19>

Team Member 3- <https://trailblazer.me/id/nvengateswaralu>

5. ADVANTAGES & DISADVANTAGE

Advantages of Property Management Applications:

1. **Automation:** Property management applications automate many tasks, which can save property managers time and money. For example, rent collection and lease tracking can be automated, which eliminates the need for manual data entry and can reduce the risk of errors.
2. **Efficiency:** By automating routine tasks and providing easy access to important information, property management applications can help property managers stay organized and efficient. This can help property managers to focus on more strategic tasks that require human input, such as developing and implementing long-term plans for their properties.
3. **Tenant Experience:** Many property management applications offer features that can improve the tenant experience, such as online rent payments and maintenance request tracking. These features can make it easier for tenants to communicate with their property managers and stay up-to-date on important information.
4. **Flexibility:** Many property management applications are cloud-based, which means that users can access them from any device with an internet

connection. This is particularly helpful for property managers who are constantly on the go and need to access information from multiple locations.

Disadvantages of Property Management Applications:

1. **Cost:** Property management applications can be expensive, especially for small property management companies or landlords who manage a few properties.
2. **Learning Curve:** Property management applications can be complex, and it may take some time to learn how to use them effectively. This can be a disadvantage for property managers who are not tech-savvy or who do not have the time to learn a new software system.
3. **Technical Issues:** Like any software system, property management applications can experience technical issues, such as downtime or software bugs. These issues can be frustrating for property managers and can disrupt their workflow.
4. **Security Concerns:** Property management applications often store sensitive data, such as tenant information and financial data. As a result, security concerns can arise if the application is not properly secured or if the data is not properly encrypted.

Overall, property management applications have many advantages that can benefit property managers and landlords. However, it's important to consider the potential disadvantages before implementing a property management application, and to choose a solution that fits your specific needs and budget.

6. APPLICATIONS

There are many property management applications available on the market, each with its own unique features and capabilities. Here are some examples of popular property management applications:

1. **Buildium:** Buildium is a cloud-based property management application that offers features such as rent collection, lease tracking, maintenance management, tenant communication, and accounting functions. It is designed for property managers who manage both residential and commercial properties.
2. **Appfolio:** Appfolio is a cloud-based property management application that offers features such as online rent collection, tenant screening, lease tracking, maintenance management, and accounting functions. It is designed for property managers who manage both residential and commercial properties.

3. **Rent Manager:** Rent Manager is a cloud-based property management application that offers features such as rent collection, lease tracking, maintenance management, tenant communication, and accounting functions. It is designed for property managers who manage both residential and commercial properties.

These are just a few examples of the many property management applications available. It's important to research and compare different applications to determine which one best fits your specific needs and budget.

7. CONCLUSION

In conclusion, property management applications have become an essential tool for property managers and landlords to manage their rental properties more efficiently. These applications automate many aspects of property management, which can save property managers time and money, and improve the tenant experience.

While there are some potential disadvantages to using property management applications, such as cost, learning curve, technical issues, and security concerns, the advantages of these applications often outweigh the disadvantages. Popular property management applications such as Buildium, Appfolio, Rent Manager, TenantCloud, and Propertyware offer a range of features and capabilities to suit the needs of different property managers and landlords.

Ultimately, choosing the right property management application can help property managers and landlords to be more organized, efficient, and effective, which can lead to better outcomes for both themselves and their tenants.

8. FUTURE SCOPE

The future scope of property management applications is bright, as the industry continues to evolve and technology advances. Here are some potential trends and developments to look out for in the future:

1. **Increased Automation:** As artificial intelligence and machine learning continue to improve, property management applications may become even more automated, with the ability to predict maintenance needs, optimize rental rates, and streamline communication with tenants.
2. **Integration with Smart Home Technology:** Smart home technology is becoming increasingly popular, and property management applications may

begin to integrate with these technologies, allowing property managers to monitor and control various aspects of their properties remotely.

3. **Enhanced Mobile Functionality:** As more property managers work remotely or on-the-go, property management applications may continue to enhance their mobile functionality, with features that allow property managers to manage their properties from their smartphones or tablets.
4. **Blockchain Technology:** Blockchain technology has the potential to revolutionize property management by providing a secure and transparent way to manage property transactions and data. In the future, property management applications may integrate blockchain technology to provide more secure and efficient property management services.
5. **Environmental Sustainability:** With an increasing focus on environmental sustainability, property management applications may begin to incorporate features that allow property managers to monitor and optimize their properties' energy usage, water usage, and other environmental impacts.

Overall, the future scope of property management applications is exciting, with the potential to improve efficiency, sustainability, and tenant experiences. As technology continues to advance, property managers and landlords will have access to increasingly sophisticated and innovative tools to help them manage their properties more effectively.