

PROJECT REPORT

TEAM LEADER: NITHYA U

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➤ TEAM MEMBERS:

MONISHA P

MUNIYAMMAL

NISHANTHI U

1.1 Overview

I have complete my project with my team. My topic is property Management application Using Salesforce this project have 11 MILESTONES. As we move past each milestone, we get to know it better.



WPS OFFICE

1.2 Purpose

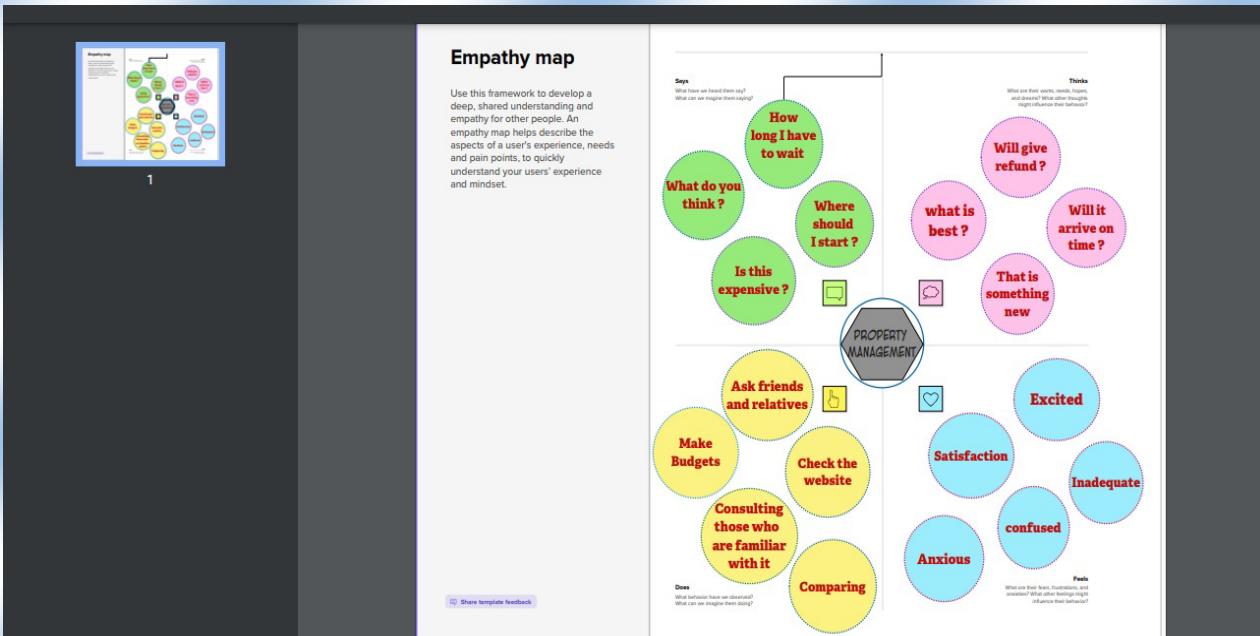
You can see the project how much profit and traffic has come from our works. By looking at more details, you can improve your business by knowing more about how to maintain vehicles and what improvements need to be made.

2 PROBLEM DEFINITION & DESIGN THINKING

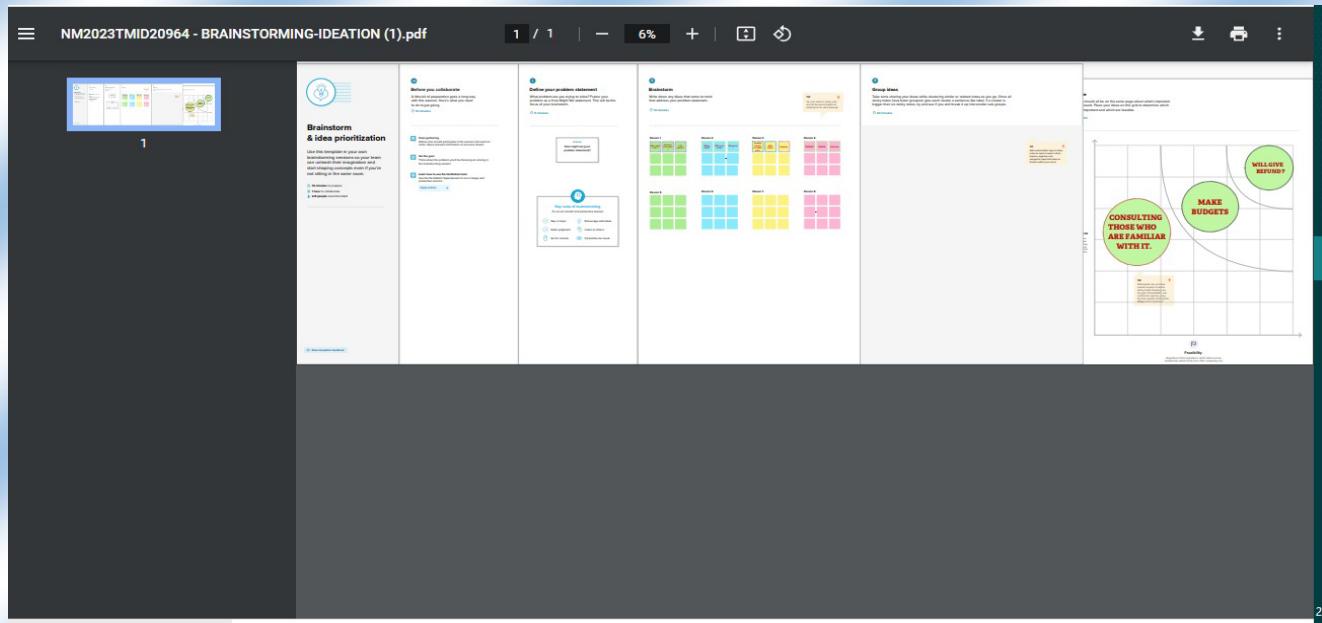
2.1 Data Model: Empathy Map

PROBLEM DEFINITION & DESIGN THINKING

2.1 Data model: Empathy map



2.1 Data Model: Ideation & Brainstorming Map



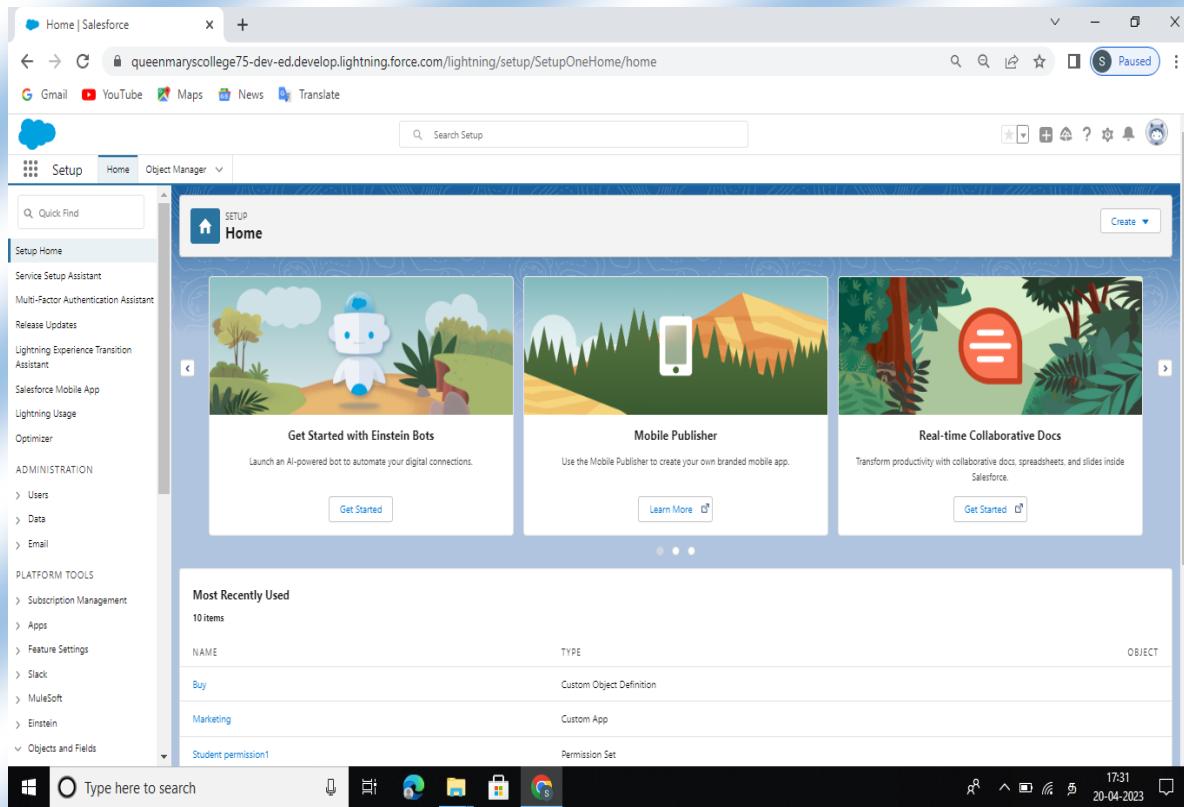
Object name	Field in the object	
	Field label.	Data type
Object 1		
LEAD	Lead	: Auto number
	State.	: Picklist
	City.	: Picklist
	Mail.	: Mail
	Phone.	: Phone

Object 2	Create property type. : Picklist Discount. : Percentage State. : Picklist City. : Picklist
Object 3	Rent. : Auto number Rental city. : Picklist BHK type. : Picklist
Object 4	Loan Id. : Auto number Interest rate. : Currency Term. : Number Annual loan. : Number Total loan instalment: Number Loan repayment. : Number Loan amount. : formula

3.2 Activity & Screenshot:

MILESTONE 1:

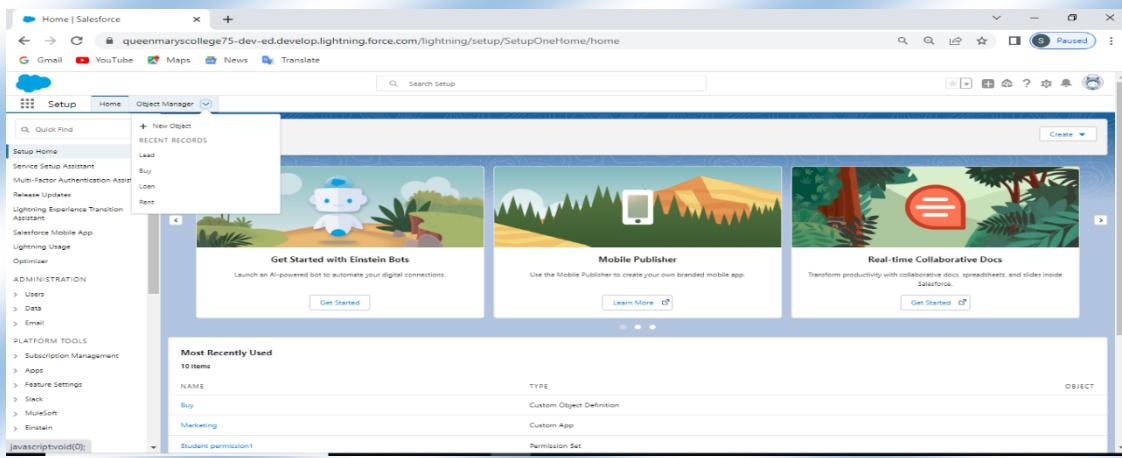




MILESTONE 2:



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MILESTONE 3:

ACTIVITY 1:

Action	Label	Tab Style	Description
Edit Del	Buyers	Car	
Edit Del	Leads	Books	
Edit Del	Loans	Airplane	
Edit Del	Rents	Laptop	

MILESTONE 4:



The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'Search Setup' and a toolbar with various icons. The main area is titled 'Lightning Experience App Manager' and displays a table of 'Clone Apps(Beta)'. The table has columns for App Name, Description, Last Modified Date, Type, and Visibility. The data is as follows:

	App Name	Description	Last Modified Date	Type	Visibility	
1	All Tabs	AllTabSet	27/03/2023, 12:18 pm	Classic	▼	
2	Analytics Studio	Insights	Build CRM Ana...	27/03/2023, 12:18 pm	Classic	✓
3	App Launcher	AppLaunch...	App Launcher t...	27/03/2023, 12:18 pm	Classic	✓
4	Bolt Solutions	Lightning...	Discover and ...	27/03/2023, 12:21 pm	Lightning	✓
5	Community	Community	Salesforce CR...	27/03/2023, 12:18 pm	Classic	✓
6	Content	Content	Salesforce CR...	27/03/2023, 12:18 pm	Classic	✓
7	Data Manager	DataManag...	Use Data Mana...	27/03/2023, 12:18 pm	Lightning	✓
8	Digital Experien...	Salesforce...	Manage conte...	27/03/2023, 12:18 pm	Lightning	✓
9	Lightning Usag...	Lightning...	View Adoption ...	27/03/2023, 12:18 pm	Lightning	✓
10	Marketing	Marketing	Best-in-class o...	27/03/2023, 12:18 pm	Classic	✓
11	Platform	Platform	The fundament...	27/03/2023, 12:18 pm	Classic	▼

MILESTONE 5:

Activity 1



Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Picklist	State	
Created By	CreatedBy/d	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedBy/d	Lookup(User)		
Lead	Lead_c	Auto Number		
Lead Name	Name	Text(80)		
Owner	OwnerId	Lookup(User/Group)		
Phone	Phone_c	Phone		
State	State_c	Picklist		

Activity 2



The screenshot shows the Salesforce Object Manager interface for the 'Buy' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and displays a table of 9 items sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy	Buy__c	Auto Number		
Buy Name	Name	Text(80)		✓
City	City__c	Picklist	State	
Create property type	Create_property_type__c	Picklist		
Created By	CreatedBy	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
State	State__c	Picklist		

Activity 3

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Gmail, YouTube, Maps, News, Translate, and a paused status indicator. The main header displays 'SETUP > OBJECT MANAGER' and the object name 'Rent'. A left sidebar lists various configuration options under 'Fields & Relationships'. The main content area is titled 'Fields & Relationships' and lists eight fields: BHK type, Created By, Last Modified By, Owner, Rent, Rent Name, Rent1, and Rental City. Each row includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK type	BHK_type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent	Rent__c	Auto Number		
Rent Name	Name	Text(80)		✓
Rent1	Rent1__c	Auto Number		
Rental City	Rental_City__c	Text(18)		

Activity 4



The screenshot shows the Salesforce Object Manager interface for the 'Loan' object. The main pane displays the 'Fields & Relationships' section, which lists 12 items sorted by Field Label. The fields include:

Field Label	Name	Type
Annual Loan	Annual_Loan__c	Auto Number
Create object loan Name	Name	Text(80)
Created By	CreatedBy/d	Lookup(User)
Interest Rate	Interest_Rate__c	Currency(18, 0)
Last Modified By	LastModifiedBy/d	Lookup(User)
Loan	Loan__c	Auto Number
loan amount	loan_amount__c	Auto Number
Loan ID	Loan_ID__c	Auto Number
Loan repayment	Loan_repayment__c	Number(18, 0)
Owner	OwnerId	Lookup(User/Group)
Term	Term__c	Number(18, 0)
Total loan instalments	Total_loan_Installments__c	Number(18, 0)

The left sidebar contains navigation links for 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, and Flow Triggers.

MILESTONE 6:



Profiles | Salesforce

queenmarycollege75-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home

G Gmail YouTube Maps News Translate

Cloud Setup Home Object Manager

Search Setup

Help for this Page

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Identity User	Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Unlocked Customer Record	Unlocked Customer Record	<input type="checkbox"/>

1-25 of 45 | 0 Selected | Page 1 of 2

Type here to search

18:14 20-04-2023



The screenshot shows the Salesforce Setup interface with the 'Manage Users' page selected. The left sidebar has 'Users' selected under 'User Management Settings'. The main area is titled 'All Users' and displays a list of users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty@00d2u000000pg5aaab.1eb0wwoy!lo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	KT	KT	kau@queenmarycollege72-dev-ed.lightning.force.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	T.Kavitha	M	muralikrishnan6889@gmail.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager
<input type="checkbox"/>	User Integration	Inteo	integration@00d2u000000pg5aaab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User Security	SSC	insightssecurity@00d2u000000pg5aaab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

MILESTONE 7:



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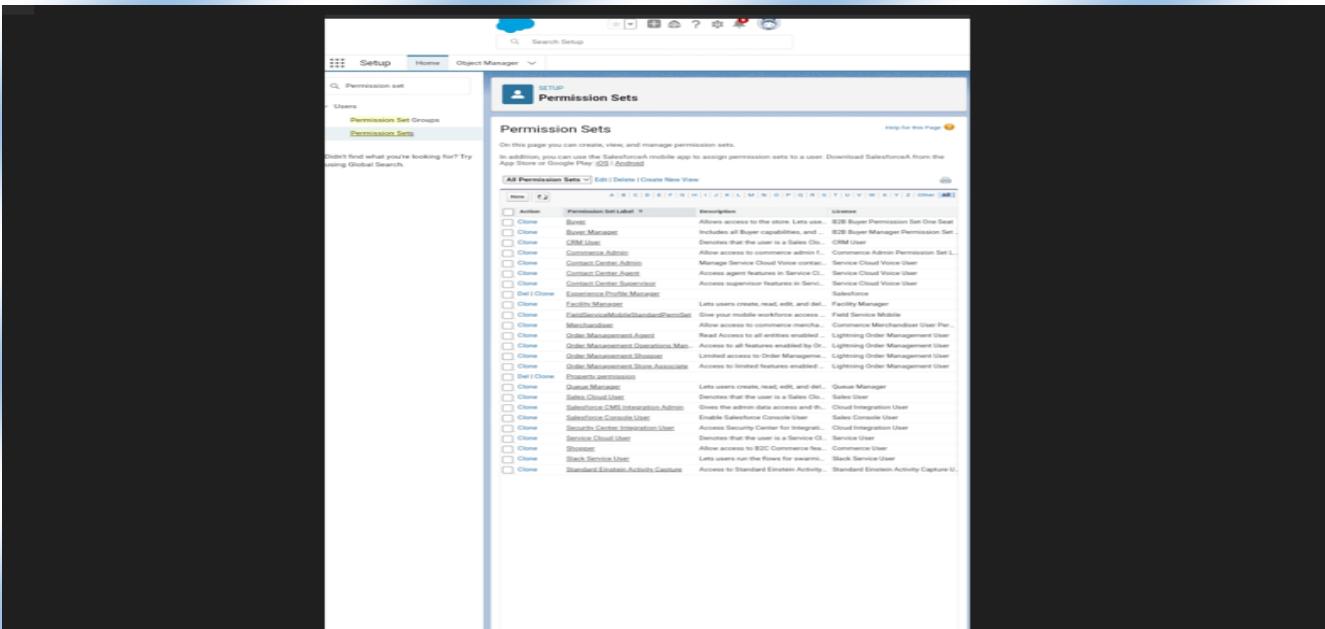
The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar includes sections for 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Maps', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'All Users' and contains a table with the following data:

Action	Full Name	Alias	Username	Role	Status	Profile
<input type="checkbox"/>	E-Mosata	EM	mosata.mosata@gmail.com	✓	Active	Standard
<input type="checkbox"/>	E-Mosata	ME	mosata.mosata@gmail.com	✓	Active	Standard
<input type="checkbox"/>	E-Mosata	me	mosata.mosata@gmail.com	✓	Active	Standard
<input type="checkbox"/>	User_1	user_1	mosata.mosata1@mosata.com	✓	Active	Standard
<input type="checkbox"/>	User_Security	sec	mosata.mosata1@mosata.com	✓	Active	Standard

MILESTONE 8:



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Milestone 9:



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2:38

VoLTE 4G 35

Setup Home Object Manager

Sharing

Sharing Settings

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

SETUP Sharing Settings

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

Disable External Sharing Model

Default Sharing Settings

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Alternative Payment Method	Private	Private	✓
Appointment Invitation	Private	Private	✓
Authorization Form	Private	Private	✓
Authorization Form Consent	Private	Private	✓
Authorization Form Data Use	Private	Private	✓
Business Brand	Private	Private	✓
Change Request	Private	Private	✓
Communication Subscription	Private	Private	✓
Communication Subscription Channel Type	Private	Private	✓
Communication Subscription Consent	Private	Private	✓
Consumption Schedule	Public Read Only	Private	✓
Contact Point Address	Controlled by Parent	Controlled by Parent	✓
Contact Point Consent	Private	Private	✓
Contact Point Email	Controlled by Parent	Controlled by Parent	✓
Contact Point Phone	Controlled by Parent	Controlled by Parent	✓
Contact Point Type Consent	Private	Private	✓
Contact Request	Public Read/Write	Private	✓
Coupon	Private	Private	✓
Credit Memo	Public Read/Write	Private	✓
Customer	Private	Private	✓
Data Use Legal Basis	Private	Private	✓
Data Use Purpose	Private	Private	✓
Engagement Channel Type	Private	Private	✓
Finance Balance Snapshot	Private	Private	✓
Finance Transaction	Private	Private	✓
Flow Interview	Private	Private	✓
Flow Interview Log	Private	Private	✓
Flow Test Result	Public Read Only	Private	✓
Image	Private	Private	✓

Milestone 10:

2:53

Reports | Salesforce - develop.lightning.force.com

Marketing Home Chatter Campaigns Leads Contacts Opportunities Reports More

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Accounts Report	loan amount>=to5000\$	Private Reports	Monisha P	15/4/2023, 5:58 pm	

REPORTS
Recent
1 items

Created by Me
Private Reports
Public Reports
All Reports

FOLDERS
All Folders
Created by Me
Shared with Me

FAVORITES
All Favorites

G English Tamil

Milestone 11:

The screenshot shows a mobile application interface for managing dashboards in a Salesforce environment. At the top, there's a header bar with the time (2:53), battery level (53%), signal strength, and a lock icon. Below the header is a navigation bar with links for Marketing, Home, Chatter, Campaigns, Leads, Contacts, Opportunities, Dashboards, and More. The main content area is titled "Dashboards | Sal..." and shows a table of recent dashboards. The table has columns for Dashboard, Description, Folder, Created By, Created On, and Subscribed. There are three entries visible:

Dashboard	Description	Folder	Created By	Created On	Subscribed
Lead	Private Dashboards	Monisha P	15/4/2023, 6:08 pm		
Copy of loan amount	Private Dashboards	Monisha P	15/4/2023, 6:06 pm		
loan amount	Private Dashboards	Monisha P	15/4/2023, 6:03 pm		

On the left side of the dashboard list, there are sections for DASHBOARDS (Recent, Created by Me, Private Dashboards, All Dashboards), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). At the bottom of the screen, there's a language selection bar with "English" and "Tamil" buttons, along with other UI elements like a back arrow and a close button.

Trailhead profile public URL:

Team lead: <https://trailblazer.me/id/nithu>



WPS Office

Team member 1: <https://trailblazer.me/id/monip25>

Team member 2: <https://trailblazer.me/id/mshankar62>

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

ADVANTAGES & DISADVANTAGES:

ADVANTAGES:

The projects are interesting, and useful for improve my computer knowledge.

Salesforce team are actively reply on chat mentor option my doubts are clarified by salesforce team.

This project dashboard are useful for profit, loss calculation easy to review.

DISADUANTAGES:

Many times system are busy and some option are not available, there is no problem available in this website is always good.

APPLICATIONS:

Sales management and system tracking system are using for salesforce

Salesforce gives standard apps such as Sales Cloud, Call Center, Salesforce Marketing Cloud, and Community.

CONCLUSION:

Finally have complete my team project its very interesting and improve my knowledge.

FUTURE SCOPE:

Future is always on salesforce hand and future is job application system. Vehicle management

system usage projects are available for future.

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