

PROJECT TEMPLATE

I. INTRODUCTION

1.1.OVERVIEW

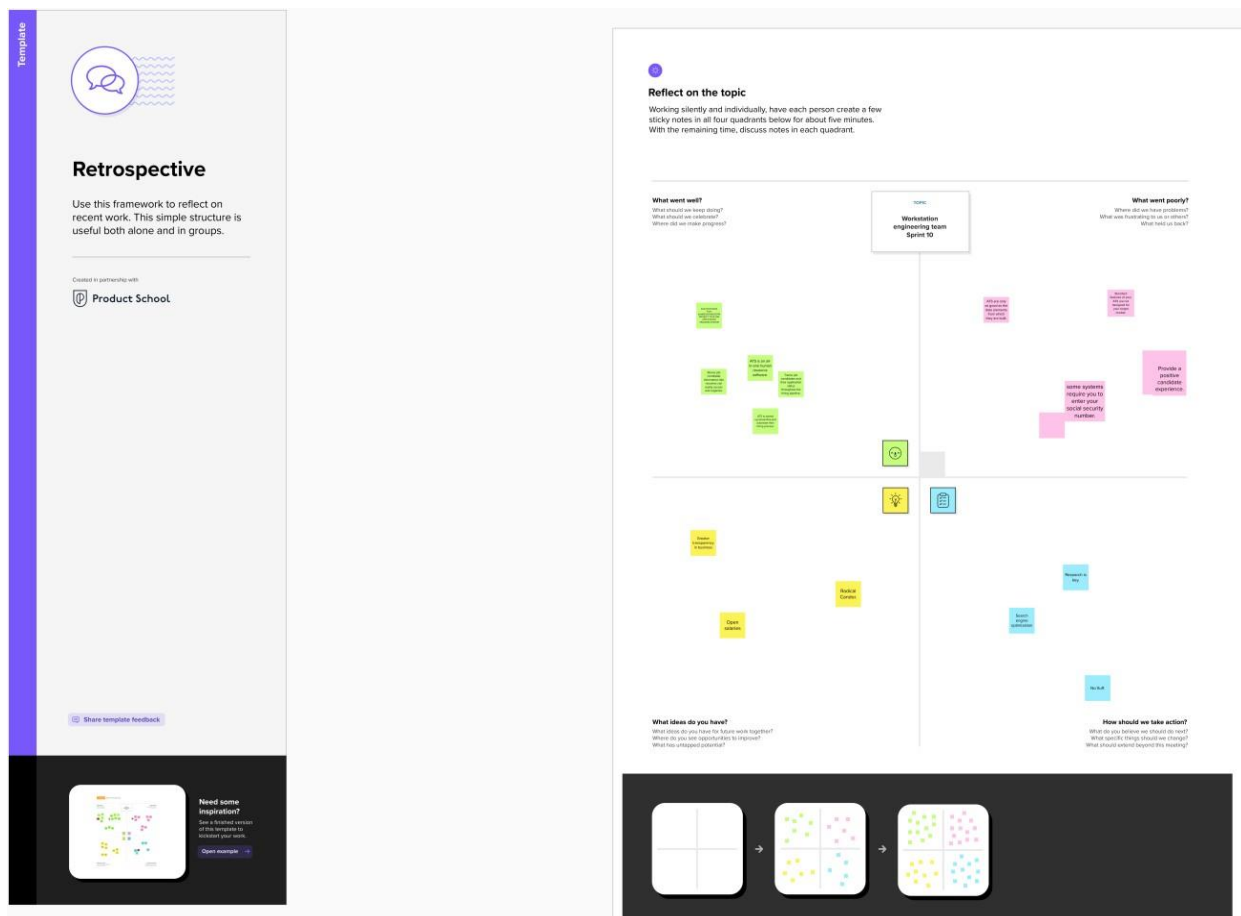
A property management system is software application for the operations of hospitality accommodations and commercial residential rental properties PMS is also used in manufacturing industries, local government and manufacturing

1.2. PURPOSE

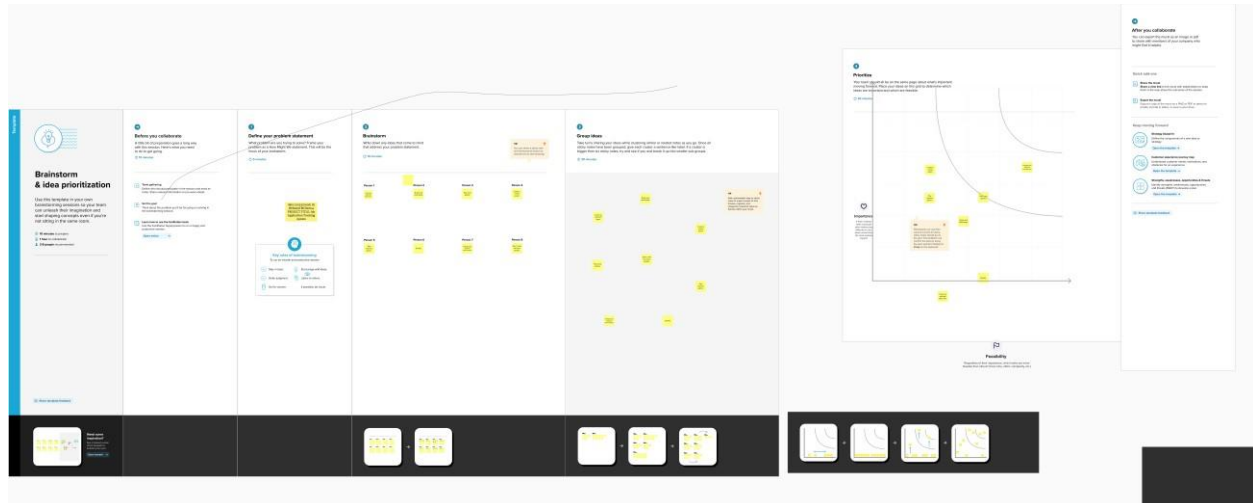
Track emails, calls and set tasks to connect with the right buyers, sellers and renters at the right time. Integrate tools to manage email campaigns and accelerate deal cycles. work anywhere with the salesforce mobile app. Integrate mail chimp to manage email marketing campaigns with current and past clients.

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1. EMPATHY MAP



2.2.IDEATION AND BRAINSTORMINGMAP



3. Result

3.1.Data Model

| OBJECT NAME | FIELDS IN THE OBJECT | |
|-----------------|----------------------|-----------|
| Standard Object | Field label | Data type |
| | Users | Text |
| | Contracts | Text |
| | | |
| Custom Object | Field Name | Data type |
| | Buy | Discount |
| | Rent | City |
| | | |

3.2 Activity and screenshot

Milestone 1: Creating developer account

Home | Salesforce

Notifications blocked

thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

> Slack

> MuleSoft

> Einstein

SETUP Home

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 items

| NAME | TYPE | OBJECT |
|---------------------------|--------------------------|---------------------|
| Buy | Custom Object Definition | |
| Marketing | Custom App | |
| Buyers | Custom Tab Definition | Buy |

Type here to search

34°C Sunny

ENG IN

2:18 PM

4/11/2023

Milestone 2:

Activity 1: Creating a Object

The screenshot displays the Salesforce Object Manager interface in a web browser. The browser's address bar shows the URL: `thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XG6P/Details/view`. The Salesforce navigation bar at the top includes the 'Setup' menu and the 'Object Manager' dropdown. The main content area is titled 'SETUP > OBJECT MANAGER Buy'. On the left, a sidebar lists various configuration options: 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, and Triggers. The 'Details' section is currently selected and expanded, showing a list of object properties. The 'Description' field is empty. The 'API Name' is 'Buy__c', and the 'Custom' checkbox is checked. The 'Singular Label' is 'Buy' and the 'Plural Label' is 'Buyers'. On the right side of the details panel, there are checkboxes for 'Enable Reports' (checked), 'Track Activities', and 'Track Field History'. Below these, the 'Deployment Status' is 'Deployed', and the 'Help Settings' are set to 'Standard salesforce.com Help Window'. At the top right of the details panel, there are 'Edit' and 'Delete' buttons. The Windows taskbar at the bottom shows the search bar, several application icons, and system information: 34°C Sunny, ENG IN, and 2:25 PM on 4/11/2023.

Buy | Salesforce

thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XG6P/Details/view

Search Setup

Setup Home Object Manager

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

Details

Description

API Name
Buy__c

Custom
✓

Singular Label
Buy

Plural Label
Buyers

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Type here to search

34°C Sunny

ENG IN

2:25 PM 4/11/2023

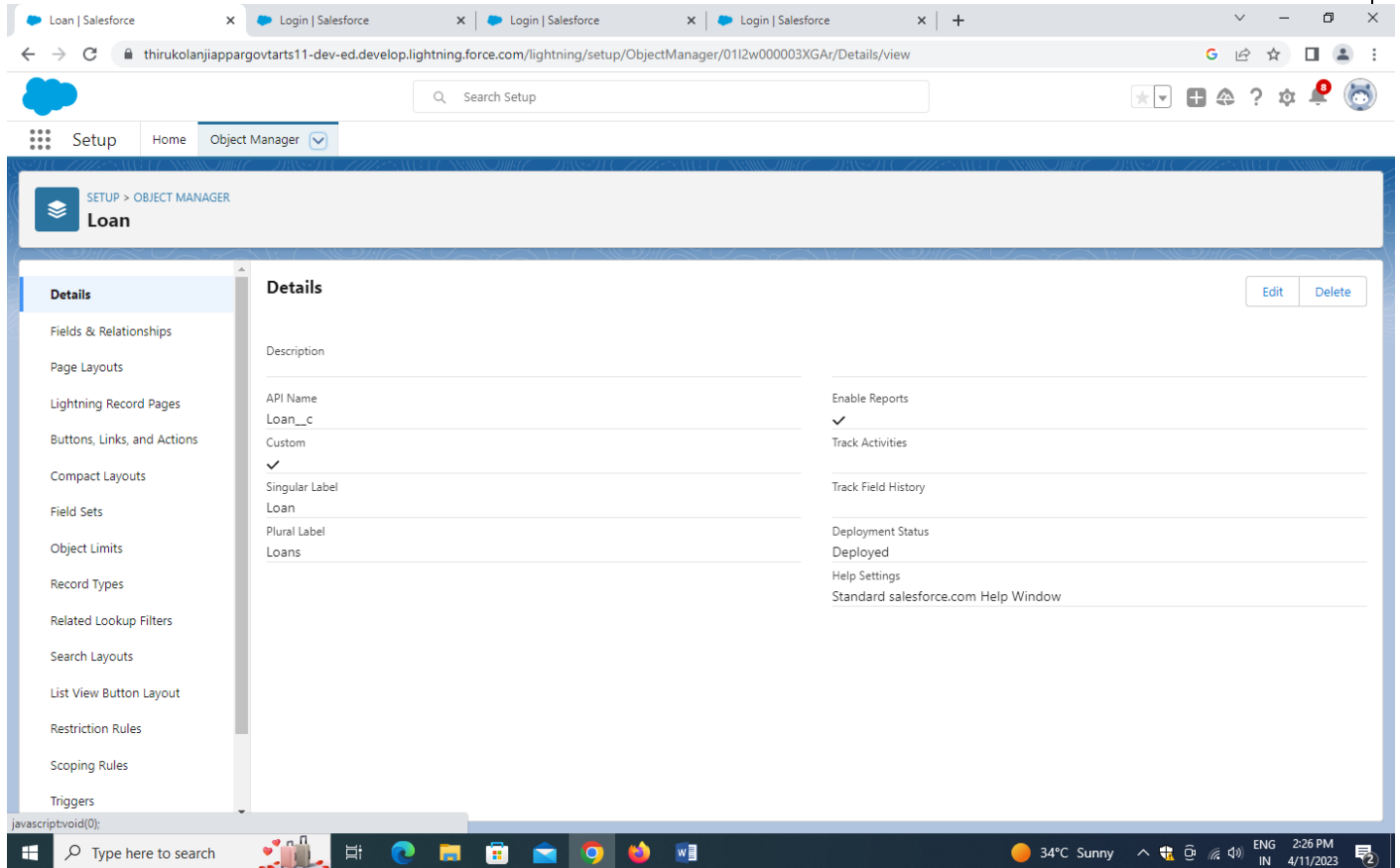
Activity 2: Create Object Buy

The screenshot shows the Salesforce Object Manager setup page for the 'Rent' object. The browser tabs at the top include 'Rent | Salesforce' and several 'Login | Salesforce' tabs. The address bar shows the URL: `thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XGAm/Details/view`. The Salesforce navigation bar includes 'Setup', 'Home', and 'Object Manager' (selected). The page header shows 'SETUP > OBJECT MANAGER' and the object name 'Rent'. On the left, a sidebar lists various configuration options: Details (selected), 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, and Triggers. The main 'Details' section contains the following fields:

| Details | |
|---------------------|-------------------------------------|
| Description | |
| API Name | Rent__c |
| Custom | ✓ |
| Singular Label | Rent |
| Plural Label | Renters |
| Enable Reports | ✓ |
| Track Activities | |
| Track Field History | |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |

At the top right of the details section are 'Edit' and 'Delete' buttons. The Windows taskbar at the bottom shows the search bar, task view button, and several application icons. The system tray on the right indicates the temperature is 34°C, it is sunny, and the date/time is 2:25 PM on 4/11/2023.

Activity 3: Create Object Rent



The screenshot shows the Salesforce Setup interface for the 'Loan' object. The browser address bar indicates the URL: `thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/D112w000003XGAz/details/view`. The page title is 'Loan' under 'SETUP > OBJECT MANAGER'. The left sidebar lists various configuration options for the object, with 'Details' currently selected. The main content area displays the 'Details' configuration for the 'Loan' object, including fields like API Name, Singular Label, and Plural Label, as well as checkboxes for 'Enable Reports' and 'Track Activities'. The 'Loan' object is currently in a 'Deployed' state.

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

Details

Description

API Name
Loan__c

Custom
✓

Singular Label
Loan

Plural Label
Loans

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Milestone 3: Tab

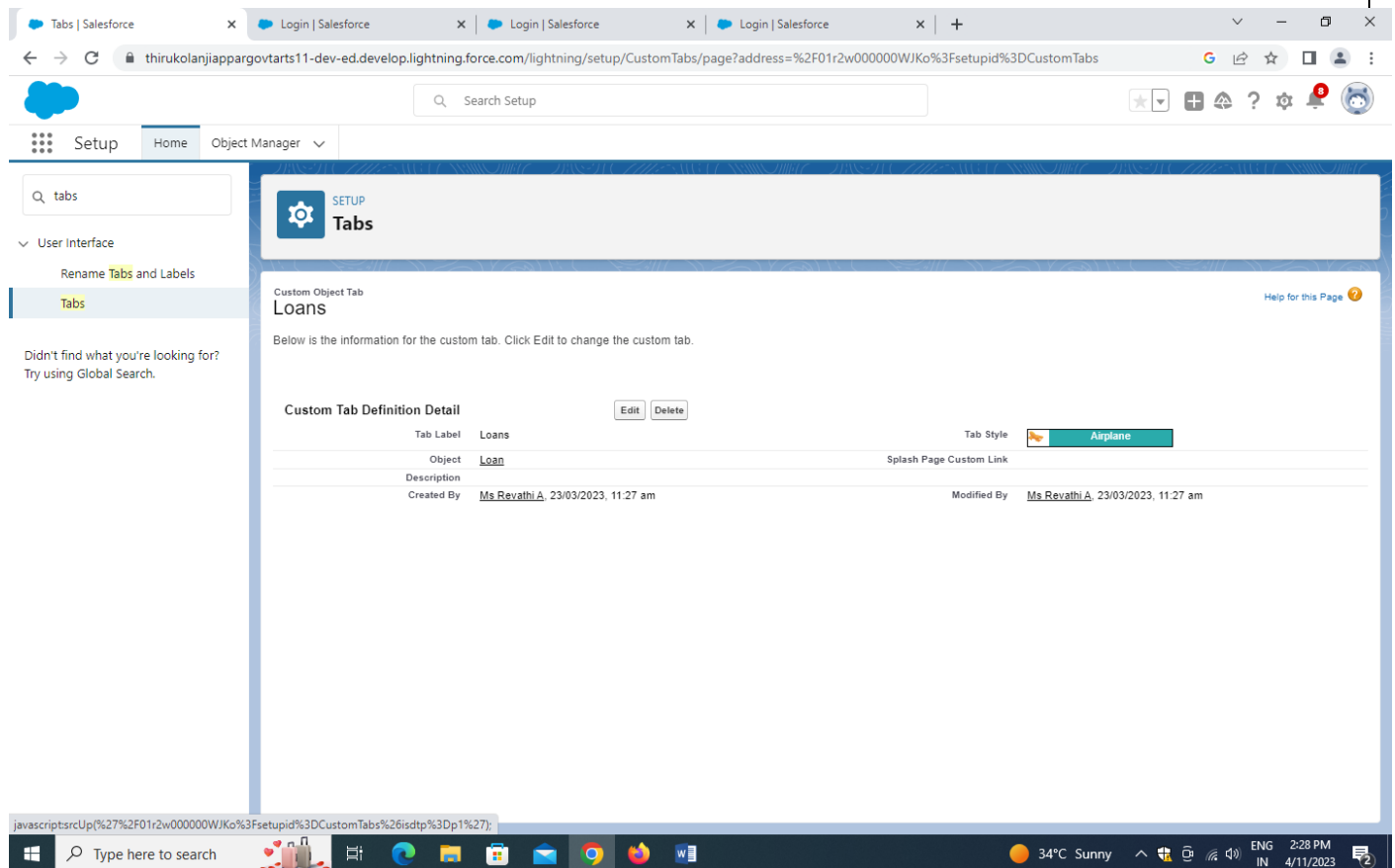
Activity 1: Create the lightning Tab

The screenshot shows the Salesforce Setup interface for creating a custom tab. The browser address bar displays the URL: `thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w000000WJKK%3Fsetupid%3DCustomTabs`. The left sidebar contains a search bar with the text "tabs" and a list of navigation items under "User Interface", including "Rename Tabs and Labels" and "Tabs". The main content area is titled "Custom Object Tab Buyers" and includes a "Help for this Page" link. Below the title, a message states: "Below is the information for the custom tab. Click Edit to change the custom tab." The "Custom Tab Definition Detail" section contains a table with the following information:

| Tab Label | Buyers | Tab Style | Big top |
|-------------|------------------------------------|-------------------------|------------------------------------|
| Object | Buy | Splash Page Custom Link | |
| Description | | | |
| Created By | Ms Revathi A. 23/03/2023, 11:14 am | Modified By | Ms Revathi A. 23/03/2023, 11:14 am |

The bottom of the image shows the Windows taskbar with the search bar, task icons, and system tray information including the date and time (2:28 PM, 4/11/2023).

Activity 2: Create a Tab (Loan)



The screenshot shows the Salesforce Setup interface for a Custom Object Tab. The browser address bar displays the URL: `thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w000000WJKo%3Fsetupid%3DCustomTabs`. The left sidebar contains the navigation menu with 'Setup' selected, and a search bar showing 'tabs'. The main content area is titled 'Loans' and includes a 'Help for this Page' link. Below the title, a message states: 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section includes an 'Edit' button and a 'Delete' button. The details are as follows:

| Tab Label | Loans | Tab Style | Airplane |
|-------------|------------------------------------|-------------------------|------------------------------------|
| Object | Loan | Splash Page Custom Link | |
| Description | | | |
| Created By | Ms Revathi A. 23/03/2023, 11:27 am | Modified By | Ms Revathi A. 23/03/2023, 11:27 am |

The Windows taskbar at the bottom shows the system clock as 2:28 PM on 4/11/2023, with a temperature of 34°C and a sunny weather forecast.

Activity 3: Create a Tab (Rent)

The screenshot displays the Salesforce Setup interface for configuring a custom tab. The browser address bar shows the URL: `thirukolanjiappargovarts11-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w000000WJKZ%3Fsetupid%3DCustomTabs`. The left sidebar contains the 'Setup' menu with 'Home' and 'Object Manager' options. The 'Tabs' section is selected under 'User Interface', showing 'Rename Tabs and Labels' and 'Tabs' options. The main content area is titled 'Custom Object Tab Renters' and includes a 'Help for this Page' link. Below the title, a message states: 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section includes an 'Edit' button and a 'Delete' button. The details are as follows:

| Tab Label | Tab Style |
|-----------|-----------|
| Renters | Apple |

Additional details include:

- Object: Rent
- Description:
- Splash Page Custom Link:
- Created By: Ms Revathi A. 23/03/2023, 11:18 am
- Modified By: Ms Revathi A. 23/03/2023, 11:18 am

The Windows taskbar at the bottom shows the system clock as 2:28 PM on 4/11/2023, with a weather forecast of 34°C Sunny.

Milestone 4: The Lightning App

Activity 1: Create the lightning App

The screenshot shows the Salesforce Lightning App Setup interface. The browser address bar displays the URL: `thirukolaniappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w000000WJKZ%3Fsetupid%3DCustomTabs`. The left sidebar contains a navigation menu with the following items:

- 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

The main content area is titled "Custom Object Tab Renters" and includes a "Help for this Page" link. Below the title, it states: "Below is the information for the custom tab. Click Edit to change the custom tab." The "Custom Tab Definition Detail" section contains the following information:

| Tab Label | Renters | Tab Style | Apple |
|-------------|------------------------------------|-------------------------|------------------------------------|
| Object | Rent | Splash Page Custom Link | |
| Description | | | |
| Created By | Ms Revathi A. 23/03/2023, 11:18 am | Modified By | Ms Revathi A. 23/03/2023, 11:18 am |

The bottom of the screen shows the Windows taskbar with the search bar, task icons, and system tray information: 34°C Sunny, ENG IN, 2:32 PM, 4/11/2023.

Milestone 5: Fields

Activity:1 Create field for Loan

tnirukoianjappargovtarts | i-dev-ed.develop.lightning.force.com/lightning/setup/objectmanager/u112wuuuu3x6at/fieldsandrelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Loan

Details

Fields & Relationships
4 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Loan Name | Name | Text(80) | | ✓ |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |

Type here to search

34°C Sunny 2:42 PM 4/11/2023

Activity 2: Create field for Rent

The screenshot shows the Salesforce Setup interface for the 'Rent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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, and Triggers.

The main content area is titled 'Fields & Relationships' and shows 4 items, sorted by Field Label. The table below lists the fields:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Rent Name | Name | Text(80) | | ✓ |

The bottom of the screen shows the Windows taskbar with the search bar, task icons, and system tray information: 34°C Sunny, ENG IN, 2:39 PM, 4/11/2023.

Activity 3: Create the remaining field

The screenshot shows the Salesforce Setup interface for the 'Loan' object. The 'Fields & Relationships' section is active, displaying a list of 4 fields sorted by Field Label. The fields are:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Loan Name | Name | Text(80) | | ✓ |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |

The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The bottom status bar shows the system clock as 2:40 PM on 4/11/2023.

Activity 4: Create Field for Lead

Lead | Salesforce x Login | Salesforce x Login | Salesforce x Login | Salesforce x +

thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Lead/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

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
Scoping Rules
Triggers
Flow Triggers

Fields & Relationships
28+ Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking Map Lead Fields

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------------|----------------------|-----------------------|-------------------|---------|
| Address | Address | Address | | |
| Annual Revenue | AnnualRevenue | Currency(18, 0) | | |
| Clean Status | CleanStatus | Picklist | | ✓ |
| Company | Company | Text(255) | | ✓ |
| Company D-U-N-S Number | CompanyDunsNumber | Text(9) | | |
| Created By | CreatedById | Lookup(User) | | |
| Current Generator(s) | CurrentGenerators__c | Text(100) | | |
| D&B Company | DandbCompanyId | Lookup(D&B Company) | | ✓ |
| Data.com Key | Jigsaw | Text(20) | | |
| Description | Description | Long Text Area(32000) | | |
| Do Not Call | DoNotCall | Checkbox | | |
| Email | Email | Email | | ✓ |
| Email Opt Out | HasOptedOutOfEmail | Checkbox | | |

Type here to search 34°C Sunny 2:45 PM 4/11/2023

Milestone 6: Profile

Activity 1: Create new profile

The screenshot shows the Salesforce Setup interface for the 'Marketing User' profile. The browser tabs at the top include 'Profiles | Salesforce', 'Login | Salesforce', and several 'Login | Salesforce' tabs. The address bar shows the URL: `thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005K9il`. The left sidebar contains a search bar with 'profile' entered, and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the 'Marketing User' profile details.

Profile: Marketing User

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

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

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Settings Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail

| Name | Marketing User |
|--------------|------------------------------------|
| User License | Salesforce |
| Created By | Ms Revathi A. 10/03/2023, 11:17 am |
| Modified By | Ms Revathi A. 27/03/2023, 11:08 am |

Page Layouts

| Standard Object Layouts | Object Milestone |
|---|---|
| Global: Global Layout [View Assignment] | Object Milestone Layout [View Assignment] |
| Email Application: Not Assigned [View Assignment] | Operating Hours: Operating Hours Layout [View Assignment] |
| Home Page Layout: DE Default [View Assignment] | Opportunity: Opportunity Layout [View Assignment] |
| Account: Account Layout [View Assignment] | Opportunity Product: Opportunity Product Layout [View Assignment] |
| Alternative Payment Method: Alternative Payment Method Layout [View Assignment] | Order: Order Layout [View Assignment] |
| Appointment Invitation: Appointment Invitation Layout [View Assignment] | Order Product: Order Product Layout [View Assignment] |
| Asset: Asset Layout [View Assignment] | Payment: Payment Layout [View Assignment] |
| Asset Action: Asset Action Layout [View Assignment] | Payment Authorization: Payment Authorization Layout [View Assignment] |

The bottom of the screen shows the Windows taskbar with various application icons and system information: 34°C Sunny, 2:48 PM, 4/11/2023.

Activity 2: Create Marketing

The screenshot shows the Salesforce Setup interface for the 'Marketing User' profile. The left sidebar contains a search bar with 'profile' and a list of navigation items: 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the 'Marketing User' profile details. The profile is created by 'Ms Revathi A' on 10/03/2023 at 11:17 am. The 'Page Layouts' section lists various standard object layouts and their assignments.

Profile Detail

| Name | Marketing User |
|--------------|------------------------------------|
| User License | Salesforce |
| Created By | Ms Revathi A, 10/03/2023, 11:17 am |
| Modified By | Ms Revathi A, 27/03/2023, 11:08 am |

Page Layouts

| Standard Object Layouts | Global | Object Milestone |
|----------------------------|--|---|
| Global | Global Layout (View Assignment) | Object Milestone Layout (View Assignment) |
| Email Application | Not Assigned (View Assignment) | Operating Hours Layout (View Assignment) |
| Home Page Layout | DE Default (View Assignment) | Opportunity Layout (View Assignment) |
| Account | Account Layout (View Assignment) | Opportunity Product Layout (View Assignment) |
| Alternative Payment Method | Alternative Payment Method Layout (View Assignment) | Order Layout (View Assignment) |
| Appointment Invitation | Appointment Invitation Layout (View Assignment) | Order Product Layout (View Assignment) |
| Asset | Asset Layout (View Assignment) | Payment Layout (View Assignment) |
| Asset Action | Asset Action Layout (View Assignment) | Payment Authorization Layout (View Assignment) |

Milestone 7: New user

Activity 1: Create User

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains navigation options: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' section is selected, showing a list of users. The main content area displays the 'User Detail' for 'Ms Revathi'. The user's information is as follows:

| User Detail | |
|---|--|
| Name | Ms Revathi |
| Alias | mreva |
| Email | revathiarumugam945@gmail.com |
| Username | revathiarumugam945@gmail.com45@gmail.com |
| Nickname | User16800091971783433519 |
| Title | Property management |
| Company | Employees |
| Department | Bsc Maths |
| Division | Shift 1EM |
| Address | |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) |
| Locale | English (India) |
| Language | English |
| Delegated Approver | |
| Manager | |
| Receive Approval Request Emails | Only if I am an approver |
| Federation ID | |
| App Registration: One-Time Password Authenticator | |
| App Registration: Salesforce | |

The user's roles and permissions are listed on the right side of the page:

- Role: Salesforce Platform
- User License: Standard Platform User
- Active: ☒
- Marketing User: ☐
- Offline User: ☒
- Knowledge User: ☐
- Flow User: ☐
- Service Cloud User: ☐
- Site.com Contributor User: ☐
- Site.com Publisher User: ☐
- WDC User: ☐
- Mobile Push Registrations: [View](#)
- Data.com User Type: [View](#)
- Accessibility Mode (Classic Only): ☐
- Debug Mode: ☐
- High-Contrast Palette on Charts: ☐
- Load Lightning Pages While Scrolling: ☒
- Salesforce CRM Content User: ☒

Milestone 8: Permission sets

Activity 1: Create the Permission Sets

The screenshot shows the Salesforce Setup interface for a Permission Set named 'Revati'. The browser tabs at the top include 'Permission Sets | Salesforce' and several 'Login | Salesforce' tabs. The address bar shows the URL: `thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000008hhnb`. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Permission Sets' and shows the 'Revati' permission set details. The 'Permission Set Overview' section includes fields for 'Description', 'License', 'Session Activation Required', 'API Name', 'Namespace Prefix', 'Created By', and 'Last Modified By'. The 'Apps' section lists various settings that apply to Salesforce apps, such as 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Anex Class Access', 'Visualforce Page Access', 'External Data Source Access', and 'Flow Access'. The Windows taskbar at the bottom shows the search bar, task view button, and several application icons, along with system information like '35°C Sunny' and '4/11/2023'.

Permission Sets | Salesforce x Login | Salesforce x Login | Salesforce x Login | Salesforce x +

thirukolanjiappargovtarts11-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000008hhnb

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP

Permission Sets

Permission Set

Revati

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

| | | |
|-----------------------------|------------------|-----------------------------------|
| Description | API Name | Revati |
| License | Namespace Prefix | |
| Session Activation Required | Created By | Ms Revathi A 29/03/2023, 12:35 pm |
| Last Modified By | | |

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

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

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

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

Anex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

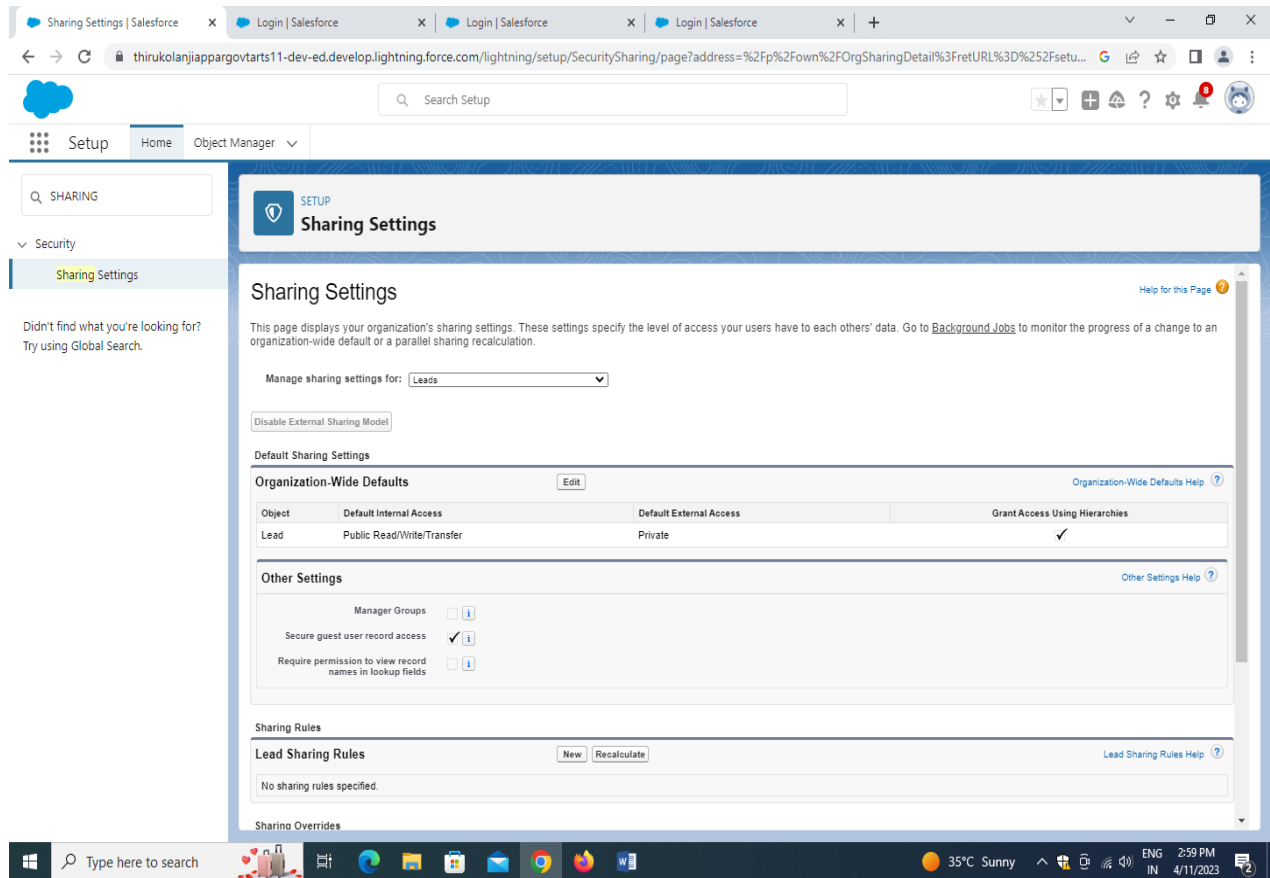
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Type here to search

35°C Sunny 2:56 PM 4/11/2023

Milestone 9: Set up for OWD

Activity 1: Create OWD Setting



The screenshot shows the Salesforce Setup interface for Sharing Settings. The browser tabs include 'Sharing Settings | Salesforce', 'Login | Salesforce', and several 'Login | Salesforce' tabs. The URL bar shows a development instance. The left sidebar has a search bar with 'SHARING' and a 'Security' section with 'Sharing Settings' selected. The main content area is titled 'Sharing Settings' and includes a 'Manage sharing settings for:' dropdown set to 'Leads'. Below this is a 'Default Sharing Settings' section with an 'Edit' button and a table for 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The 'Lead' object is listed with 'Public Read/Write/Transfer' internal access, 'Private' external access, and 'Grant Access Using Hierarchies' checked. Below the table is an 'Other Settings' section with checkboxes for 'Manager Groups', 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields'. At the bottom is a 'Sharing Rules' section with a 'New' button and a 'Recalculate' button, and a message stating 'No sharing rules specified.'.

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: Leads

[Disable External Sharing Model](#)

Default Sharing Settings

[Edit](#) [Organization-Wide Defaults Help](#)

| Object | Default Internal Access | Default External Access | Grant Access Using Hierarchies |
|--------|----------------------------|-------------------------|-------------------------------------|
| Lead | Public Read/Write/Transfer | Private | <input checked="" type="checkbox"/> |

Other Settings [Other Settings Help](#)

Manager Groups ☐ [i](#)

Secure guest user record access ☒ [i](#)

Require permission to view record names in lookup fields ☐ [i](#)

Sharing Rules

Lead Sharing Rules [New](#) [Recalculate](#) [Lead Sharing Rules Help](#)

No sharing rules specified.

Sharing Overrides

Milestone 10: Report

Activity 1: Create Report

The screenshot displays a Salesforce web interface with a report titled "New Accounts Report". The report is filtered for "Accounts" and shows 13 total records. The table includes columns for Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. The data is as follows:

| | Last Activity | Account Owner | Account Name | Billing State/Province | Type | Rating | Last Modified Date |
|----|---------------|-------------------|-------------------------------------|------------------------|--------------------|--------|--------------------|
| 1 | - | Ms SARANYA S | GenePoint | CA | Customer - Channel | Cold | 21/03/2023 |
| 2 | - | Ms SARANYA S | United Oil & Gas, UK | UK | Customer - Direct | - | 21/03/2023 |
| 3 | - | Ms SARANYA S | United Oil & Gas, Singapore | Singapore | Customer - Direct | - | 21/03/2023 |
| 4 | - | Ms SARANYA S | Edge Communications | TX | Customer - Direct | Hot | 21/03/2023 |
| 5 | - | Ms SARANYA S | Burlington Textiles Corp of America | NC | Customer - Direct | Warm | 21/03/2023 |
| 6 | - | Ms SARANYA S | Pyramid Construction Inc. | - | Customer - Channel | - | 21/03/2023 |
| 7 | - | Ms SARANYA S | Dickenson plc | KS | Customer - Channel | - | 21/03/2023 |
| 8 | - | Ms SARANYA S | Grand Hotels & Resorts Ltd | IL | Customer - Direct | Warm | 21/03/2023 |
| 9 | - | Ms SARANYA S | Express Logistics and Transport | OR | Customer - Channel | Cold | 21/03/2023 |
| 10 | - | Ms SARANYA S | University of Arizona | AZ | Customer - Direct | Warm | 21/03/2023 |
| 11 | - | Ms SARANYA S | United Oil & Gas Corp. | NY | Customer - Direct | Hot | 21/03/2023 |
| 12 | - | Ms SARANYA S | sForce | CA | - | - | 21/03/2023 |
| 13 | - | Automated Process | Sample Account for Entitlements | - | - | - | 21/03/2023 |

The interface also shows a navigation bar with options like Marketing, Home, Chatter, Campaigns, Leads, Contacts, Opportunities, Reports, Dashboards, buyers, rents, and loans. The bottom of the screen shows a Windows taskbar with various application icons and system information like 35°C Sunny and 3:10 PM on 4/11/2023.

Milestone 11: Dashboard

Activity 1: Create Dashboard

Dashboards

Recent

1 items

Q Search recent dashboards...

New Dashboard

New Folder

▾

| DASHBOARDS | Dashboard Name ▾ | Description ▾ | Folder ▾ | Created By ▾ | Created On ▾ | Subscribed | |
|--------------------|---------------------------|---------------|--------------------|--------------|---------------------|------------|---|
| Recent | new lead with loan amount | | Private Dashboards | Ms Revathi A | 29/3/2023, 12:08 pm | | ▾ |
| Created by Me | new lead with loan amount | | Private Dashboards | Ms Revathi A | 29/3/2023, 12:06 pm | | ▾ |
| Private Dashboards | new lead with loan amount | | Private Dashboards | Ms Revathi A | 29/3/2023, 12:04 pm | | ▾ |
| All Dashboards | new lead with loan amount | | loan amount | Ms Revathi A | 29/3/2023, 11:59 am | | ▾ |
| FOLDERS | | | | | | | |
| All Folders | | | | | | | |
| Created by Me | | | | | | | |
| Shared with Me | | | | | | | |
| FAVORITES | | | | | | | |
| All Favorites | | | | | | | |

4. Trailhead Profile Public URL

Team Lead <https://trailblazer.me/id/rrevathi19>

TEAM MEMBER 1- <https://trailblazer.me/id/renuv6>

TEAM MEMBER 2- <https://trailblazer.me/id/priaya>

TEAM MEMBER 3- <https://trailblazer.me/id/kkanniyamma>

TEAM MEMBER 4- <https://trailblazer.me/id/ssandhiya22>

TEAM MEMBER 5- <https://trailblazer.me/id/sshanmugam62>

5. ADVANTAGES AND DISADVANTAGE

ADVANTAGE:

A property management system is integrated into every department within a hotel, allowing you to communicate effectively with both employees or outside contractors while keeping an eye on revenue inventory, or sales. automating routine tasks can save timer for both you and your employees- housekeeping assignments, maintenance requests, reservation manifests and nightly audits are available at the touch a button.

DISADVANTAGE:

Time- consuming if you choose the wrong system.

Might seem expensive for a small business.

Training (cost and time).

6. APPLICATIONS

Application management services are an enterprise-wide endeavor providing governance designed to ensure applications run at peak performance and as efficiently as possible, from the end user experience to integration with enterprise back office functions such as database, ERP, and SaaS cloud

7. CONCLUSION

Property management system software is very crucial for all the hotels, especially opera PMS constitutes the most appropriate PMS Software for Hilton Athens. It is user friendly connects with Central Reservation System, Point of Sale etc. and provides all the tools the hotel needs in order to operate effectively. The disadvantages of the Opera PMS can be improved easily and as it was mentioned before a recommendation is the upgrade o Opera V5 to Opera9.

8. FUTURE SCOPE

The global Real Estate Management software market is geographically divided into regions such as North America, Latin America, Europe, Asia Pacific, the Middle East, and Africa. The report covers all aspects of the regional and global markets from manufacturing and customer shares to market size and market share, import and export ratios supply and demand ratios, consumer demand ratios, technological improvements and R&D activate. The report also covers strong market presence in every region.