



# PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

**Project Based Experiential Learning Program**

## **Property Management Application using Salesforce**

### **Project Description:-**

Develop an App for the Property Management where Buyer can order his Requirements and get the Appropriate Details of the Property. According to his interest just provide him with some discounts upto what extent he can get the discount. Also Track Whether he is Interested in taking the loan available for so just calculate how much loan Amount user can get it. Provide the Security for two different profiles like for marketing and sales team. Then Finally Create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal

### **What you'll learn**

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce

### **Milestone 1-Salesforce**

#### **Introduction:**

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

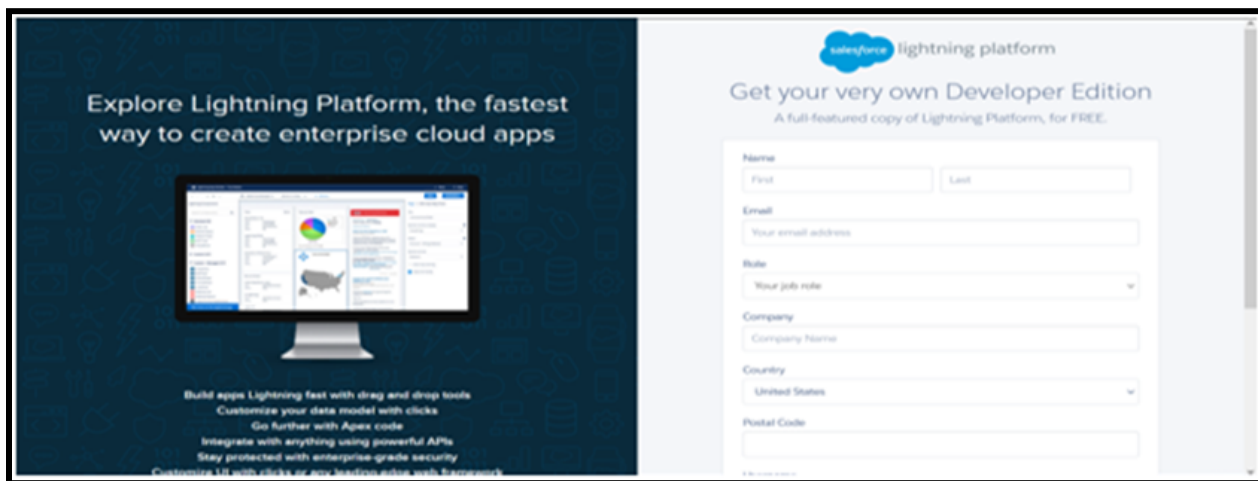
#### **What Is Salesforce?**

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>



### Activity1:

#### Creating Developer Account

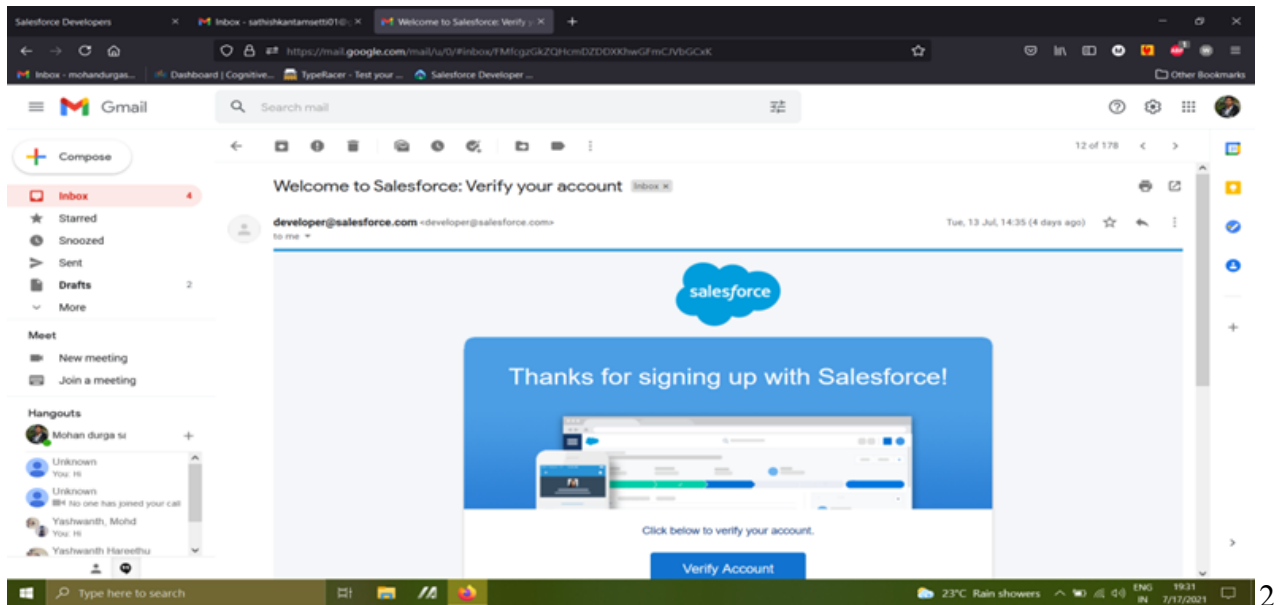
Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developers.salesforce.com/)
  2. Click on sign up.
  3. On the sign up form, enter the following details :
    - a. First name & Last name
    - b. Email
    - c. Role : Developer
    - d. Company : College Name
    - e. Country : India
    - f. Postal Code : pin code
    - g. Username : should be a combination of your name and company
- This need not be an actual email id, you can give anything in the format :  
[username@organization.com](mailto:username@organization.com)  
 Click on sign up after filling these.

### Activity 2-

## Account Activation

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



2. Login To Your Salesforce Account

## Milestone 2- Object

### What Is Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

### Salesforce objects are of two types:

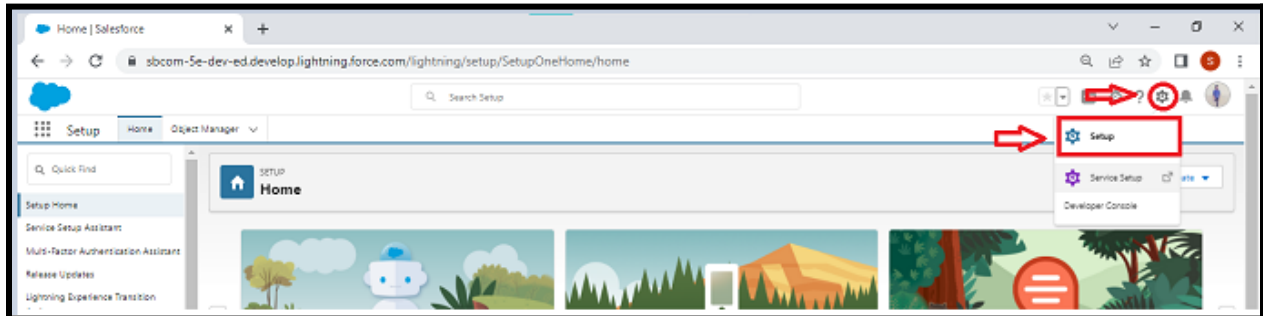
- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

## Activity1:

### Objects=

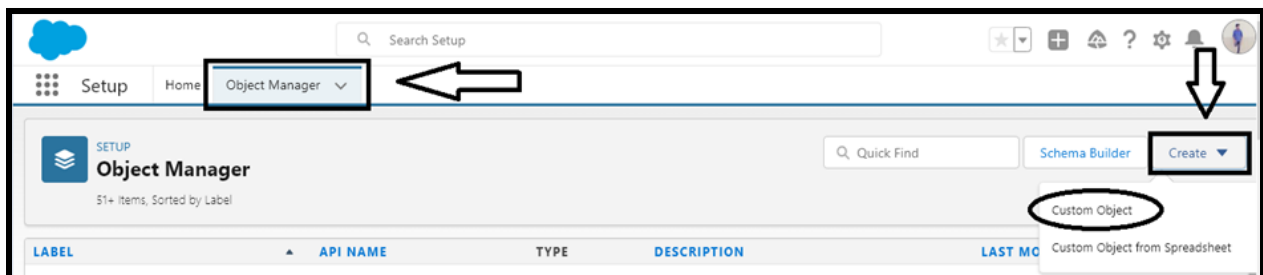
#### To Navigate to Setup page:

1. Click on gear icon → click setup.



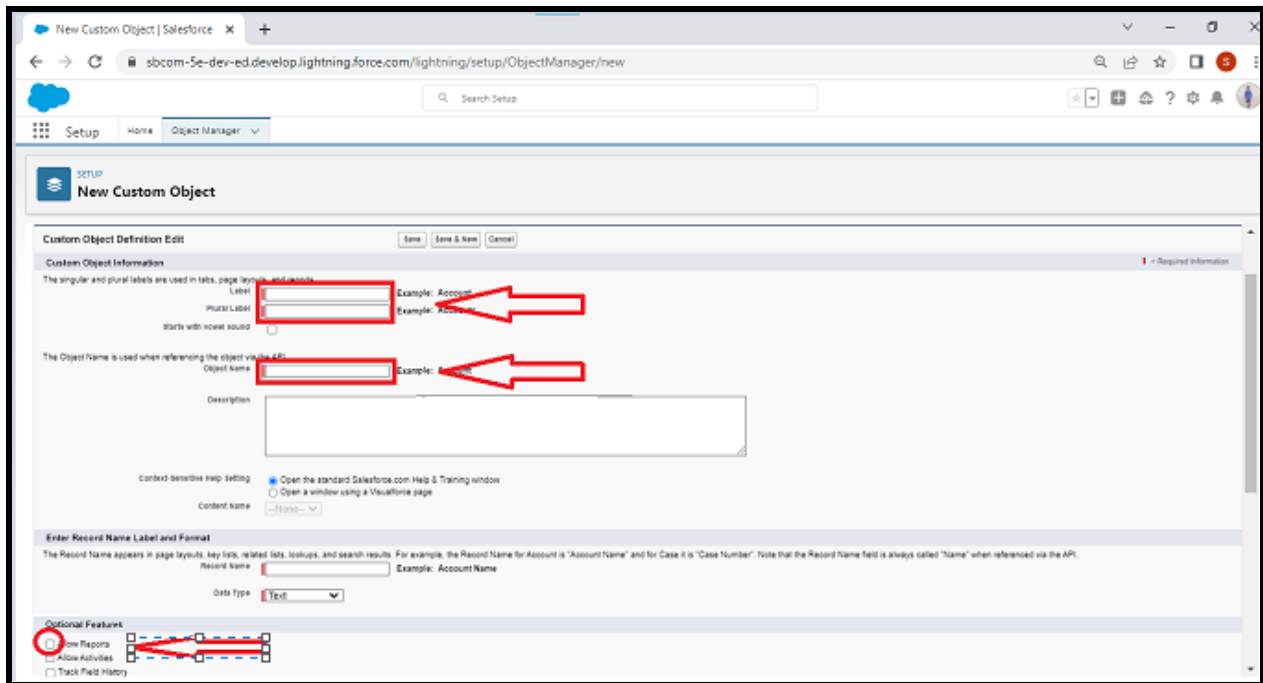
#### To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search → **Save**



**New Custom Object | Salesforce**

sbcom-5e-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 records.

Label  Example: Account

Plural Label  Example: Accounts

Starts with novel 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

Constant name

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key tabs, related lists, listviews, 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

Date Type

**Optional Features**

☒ Allow Reports ☐ Allow Activities ☐ Track Field History ☐ Enable Licensing

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing ☒ Allow Bulk API Access ☒ Allow Streaming API Access

**Deployment Status** [What Is This?](#)

☐ In Development ☒ Deployed

**Search Status**

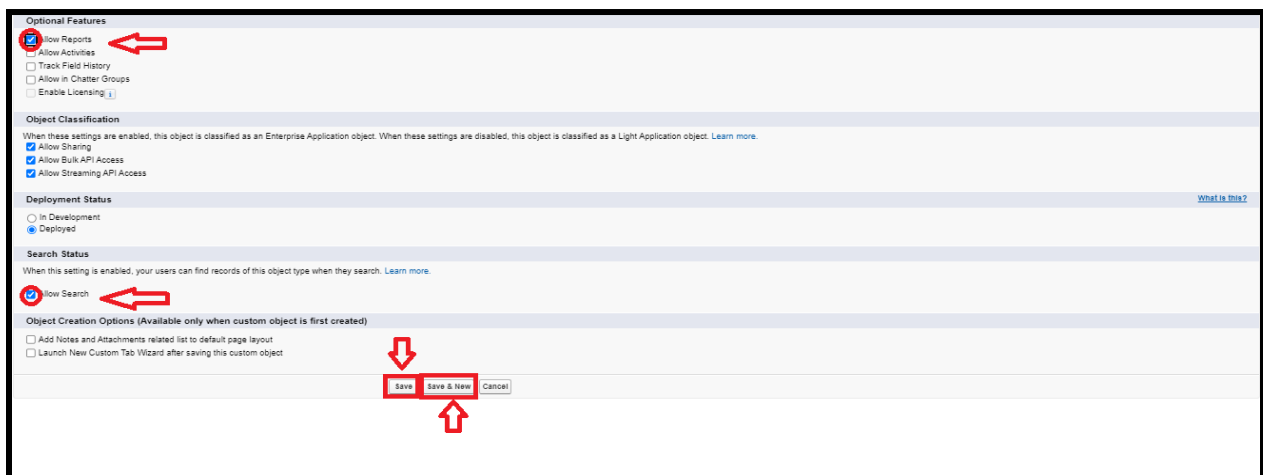
When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

**Object Creation Options (Available only when custom object is first created)**

☐ Add Notes and Attachments related list to default page layout ☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel



**Optional Features**

☒ Allow Reports ☐ Allow Activities ☐ Track Field History ☐ Enable Licensing

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

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**Deployment Status** [What Is This?](#)

☐ In Development ☒ Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

**Object Creation Options (Available only when custom object is first created)**

☐ Add Notes and Attachments related list to default page layout ☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

**Activity2:****Create Object Buy**

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

**Activity3:****Create Object Rent**

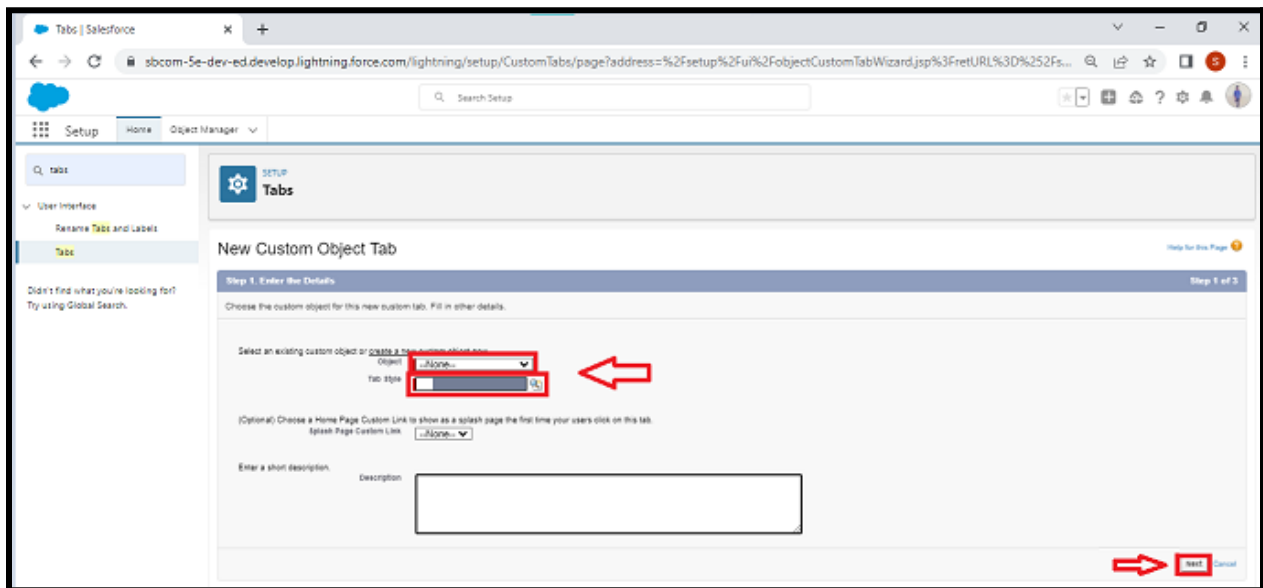
1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name→Rent
4. plural label name→ Rents
5. click on Allow reports,
6. Allow search → **Save**

**Activity3:****Create Object Loan**

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

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





## Activity 2:

### To create a Tab:(Buy)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.

## Activity 3:

### To create a Tab:(Rent)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(Rent) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save

## Activity4:

### To create a Tab:(Loan)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save

## Milestone 4- The Lightning App:

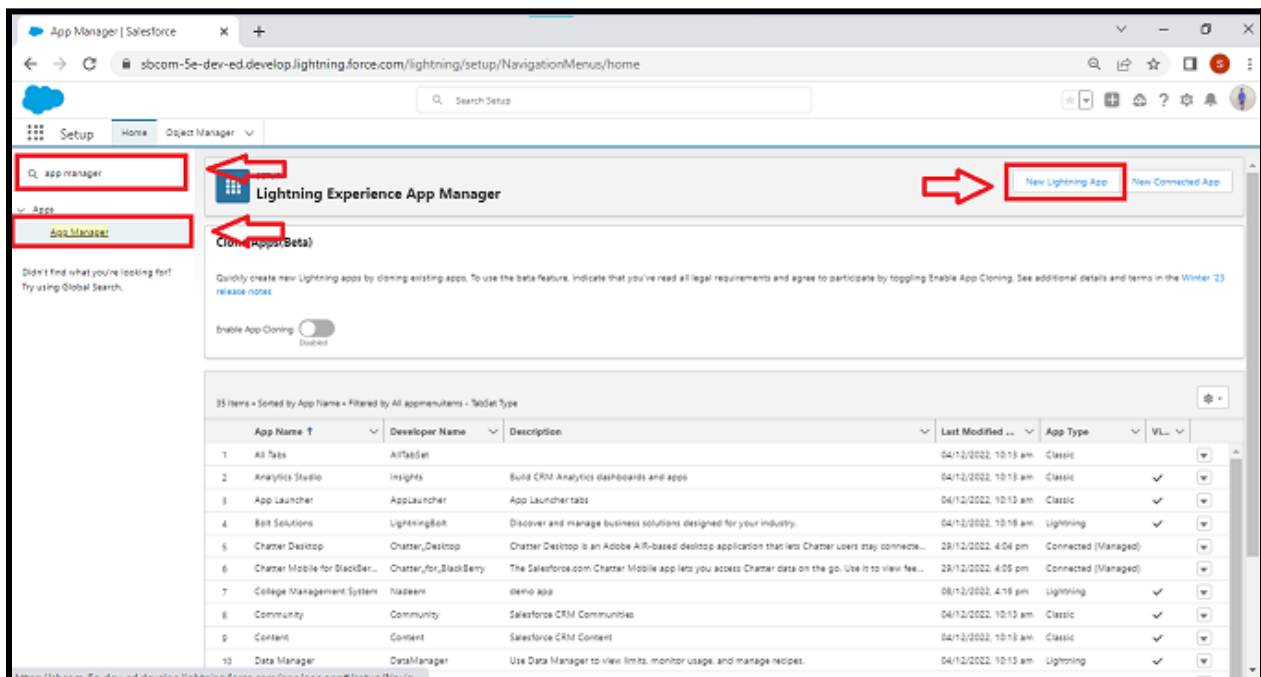
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

## Activity1:

### Create the Lightning App

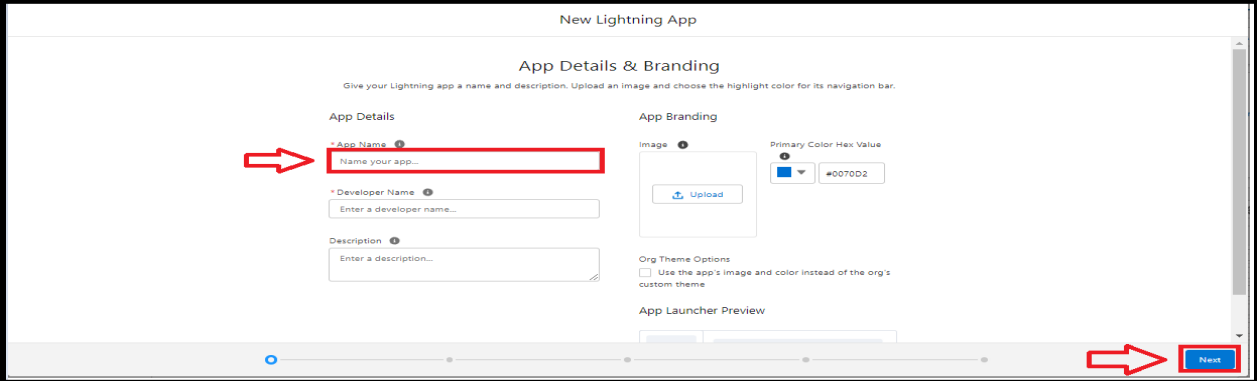
1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.



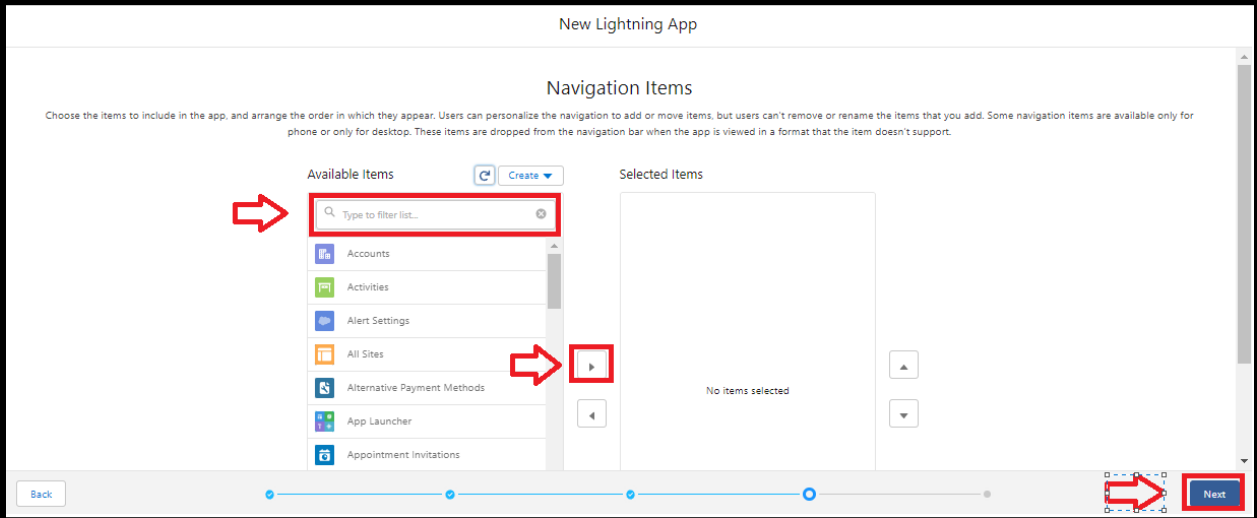
35 Items • Sorted by App Name • Filtered by All app menu items • Select Type

App Name ↑	Developer Name	Description	Last Modified	App Type	VL
1 All Tabs	AllTabs		04/12/2022, 10:13 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	04/12/2022, 10:13 am	Lightning	✓
5 Charter Desktop	ChatterDesktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Charter users stay connect...	22/12/2022, 4:04 pm	Connected (Managed)	
6 Charter Mobile for BlackBer...	Chatter_for_BlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fee...	22/12/2022, 4:05 pm	Connected (Managed)	
7 College Management System	hdsdcm	demo app	08/12/2022, 4:18 pm	Lightning	✓
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	✓
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage quotas.	04/12/2022, 10:13 am	Lightning	✓

2. Fill the app name as an **Property Management** in app details and branding →Next → (App option page) keep it as default → Next
3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform user, Standard User → Next.

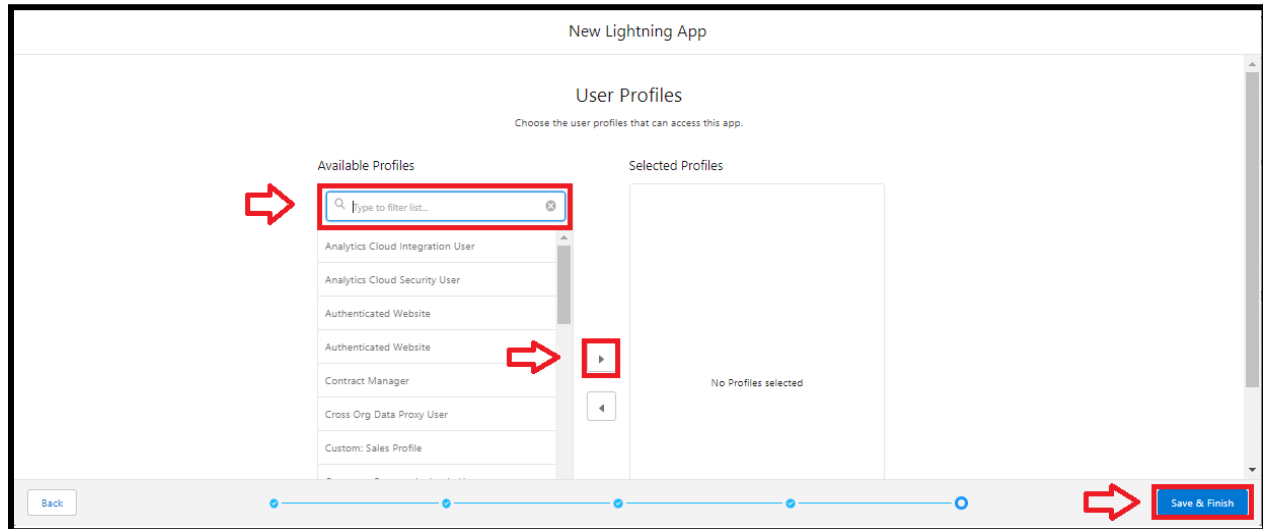


4. To Add Navigation Items:  
Select the items from the search bar and move it using the arrow button → Next.



## 5. To Add User Profiles:

Search profiles in search bar → click on the arrow button → save & finish.



## **Milestone5-Fields**

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

### Types of Fields

- Standard Fields
- Custom Fields

### **Standard Fields:**

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

- Created By
- Owner
- Last Modified

- Field Made During object Creation

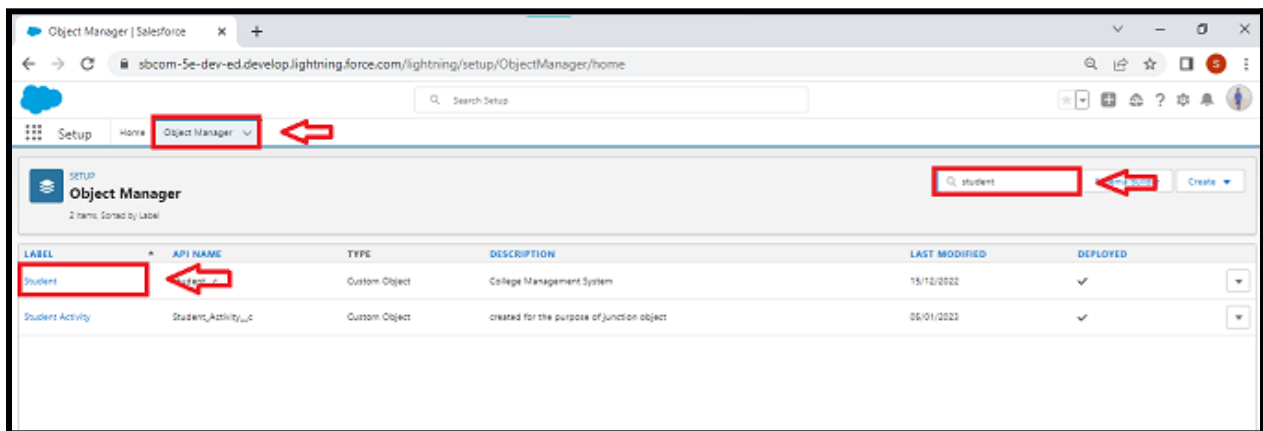
### Custom Fields:

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

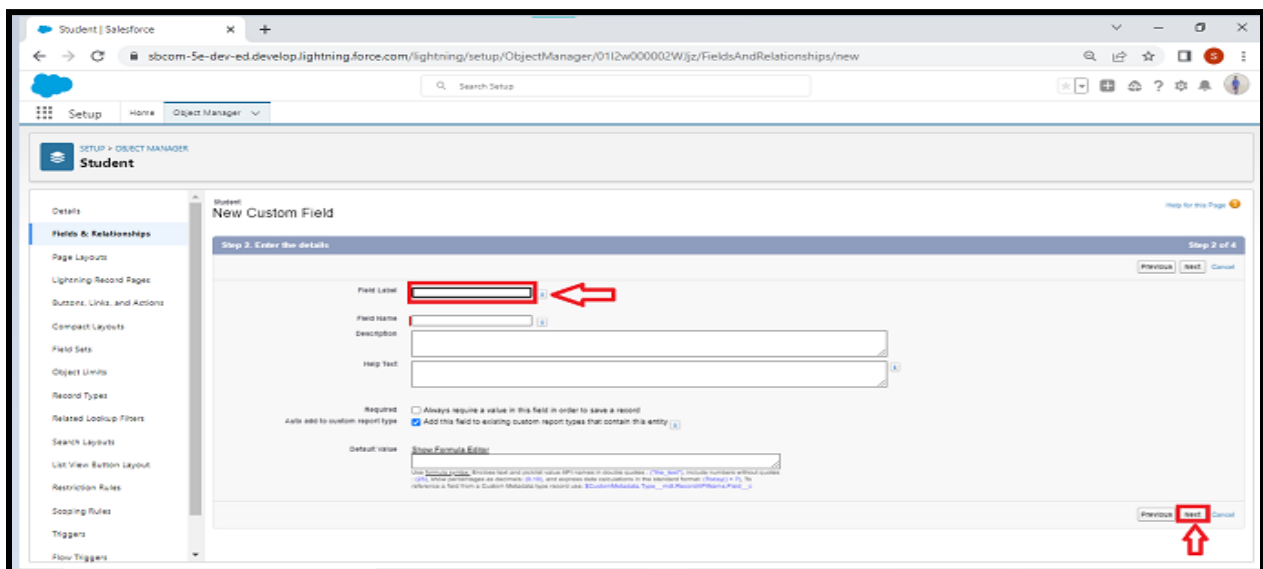
## Activity 1:

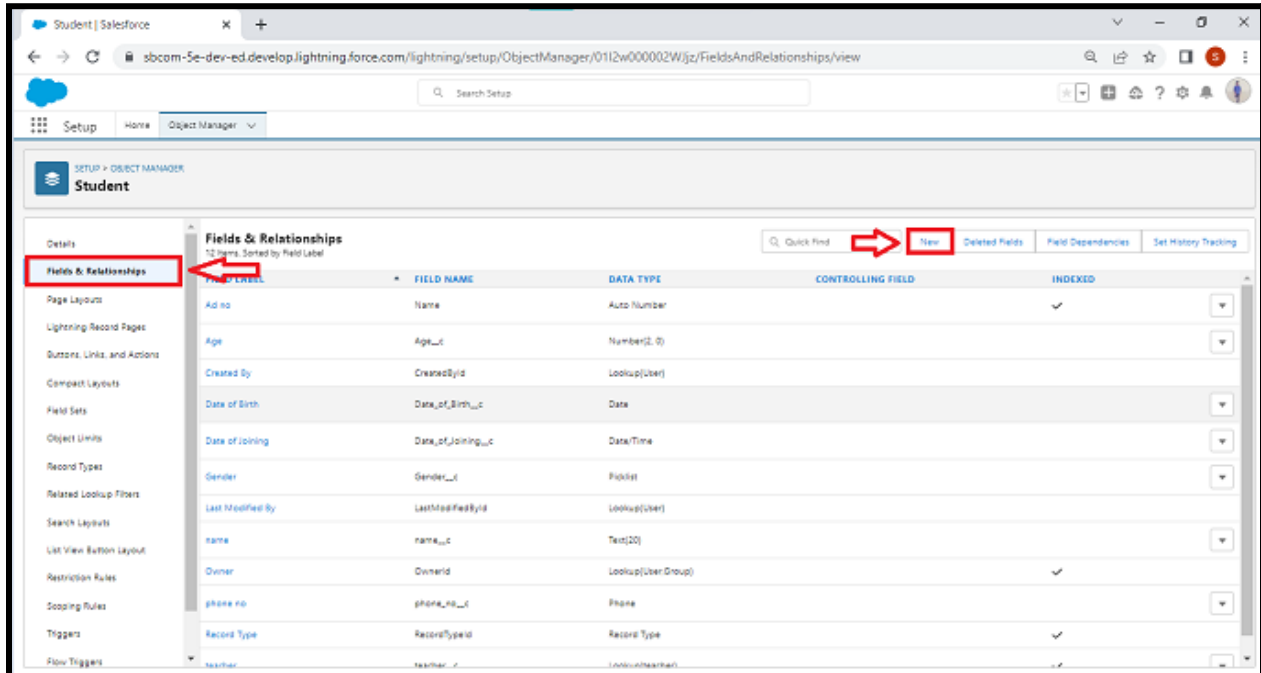
## Create the Lead Field

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



2. Now click on “Fields & Relationships ” → New.





Student | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000002W/jz/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student

Details

**Fields & Relationships** 12 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Ad no	Name	Auto Number		✓
Age	Age__c	Number(2, 0)		
Created By	CreatedBy	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Date of Joining	Date_of_Joining__c	Date/Time		
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedBy	Lookup(User)		
name	name__c	Text(20)		
Owner	OwnerId	Lookup(User Group)		✓
phone no	phone_no__c	Phone		
Record Type	RecordTypeId	Record Type		✓
teacher	teacher__c	Lookup(teacher)		✓

3. Fill the field label name Lead → Next → Next → Save.

### Create the remaining Fields:

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

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

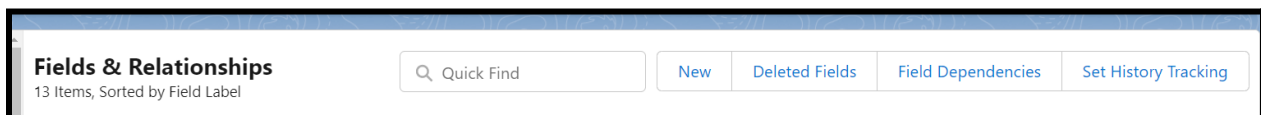
**State:** Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

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

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

**Phone:**Select the Field Data type as (Phone)

In the Fields and Relationship go to the Field Dependencies



**Fields & Relationships**

13 Items, Sorted by Field Label

Quick Find New Deleted Fields **Field Dependencies** Set History Tracking

Click button to include or exclude selected values from the dependent picklist:

Showing Columns: 1 - 4 (of 4) < Previous   Next > <a href="#">View All</a> <a href="#">Go to</a>				
State:	<u>Maharashtra</u>	<u>Telangana</u>	<u>Gujrat</u>	<u>Tamil Nadu</u>
City:	Mumbai	Mumbai	Mumbai	Mumbai
	Pune	Pune	Pune	Pune
	Nasik	Nasik	Nasik	Nasik
	Hyderabad	Hyderabad	Hyderabad	Hyderabad
	Surat	Surat	Surat	Surat
	Ahemdabad	Ahemdabad	Ahemdabad	Ahemdabad

Showing Columns: 1 - 4 (of 4) < Previous | Next > [View All](#)

Click button to include or exclude selected values from the dependent picklist:

## Activity2: For Object Buy

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

## Activity3:

### Create Field for Rent

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

## Activity4:

### Create Field for Loan

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

New Profile 		
<input type="checkbox"/> Action	Profile Name ↑	User License
<input type="checkbox"/> <a href="#">Edit   Clone</a>	<a href="#">Silver Partner User</a>	Silver Partner
<input type="checkbox"/> <a href="#">Edit   Clone</a>	<a href="#">Solution Manager</a>	Salesforce
<input type="checkbox"/> <a href="#">Edit   Clone</a>	<a href="#">Standard Platform User</a>	Salesforce Platform
<input type="checkbox"/> <a href="#">Edit   Clone</a>	<a href="#">Standard User</a>	Salesforce
<input type="checkbox"/> <a href="#">Edit   Clone</a>	<a href="#">System Administrator</a>	Salesforce

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

$$(\text{Loan\_Repayment\_c} * (((1 + (\text{Interest\_rate\_c} / 52))^{\text{Term\_c}}) - 1)) / ((\text{Interest\_rate\_c} / 52) * ((1 + (\text{Interest\_rate\_c} / 52))^{\text{Term\_c}}))$$

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

Simple Formula

Advanced Formula

Insert Field

Insert Operator ▼

Loan Amount (Currency) =  

$$(\text{Loan\_Repayment\_c} * (((1 + (\text{Interest\_rate\_c} / 52))^{\text{Term\_c}}) - 1)) / ((\text{Interest\_rate\_c} / 52) * ((1 + (\text{Interest\_rate\_c} / 52))^{\text{Term\_c}}))$$

Check Syntax

No syntax errors in merge fields or functions. (Compiled size: 274 characters)



# Smart Internz

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

## Types of profiles in salesforce

### Standard profiles:

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

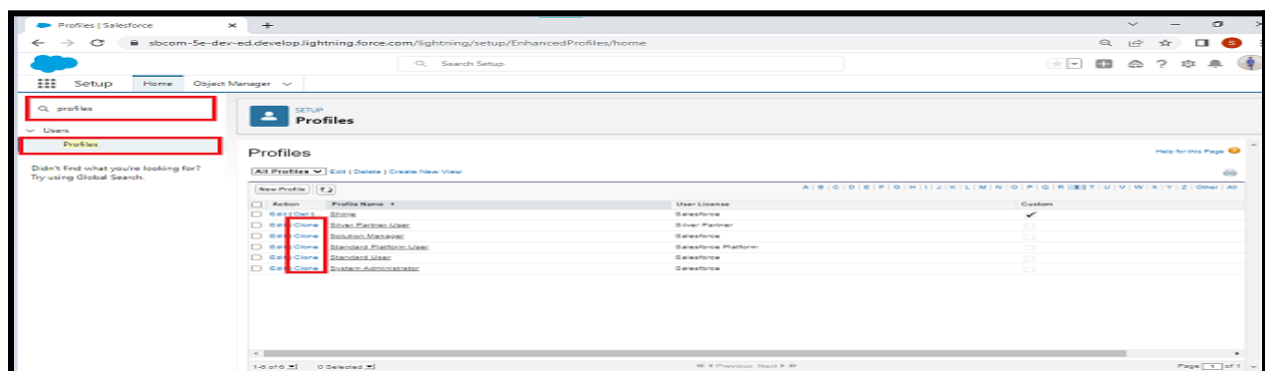
## 2. Custom Profiles:

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

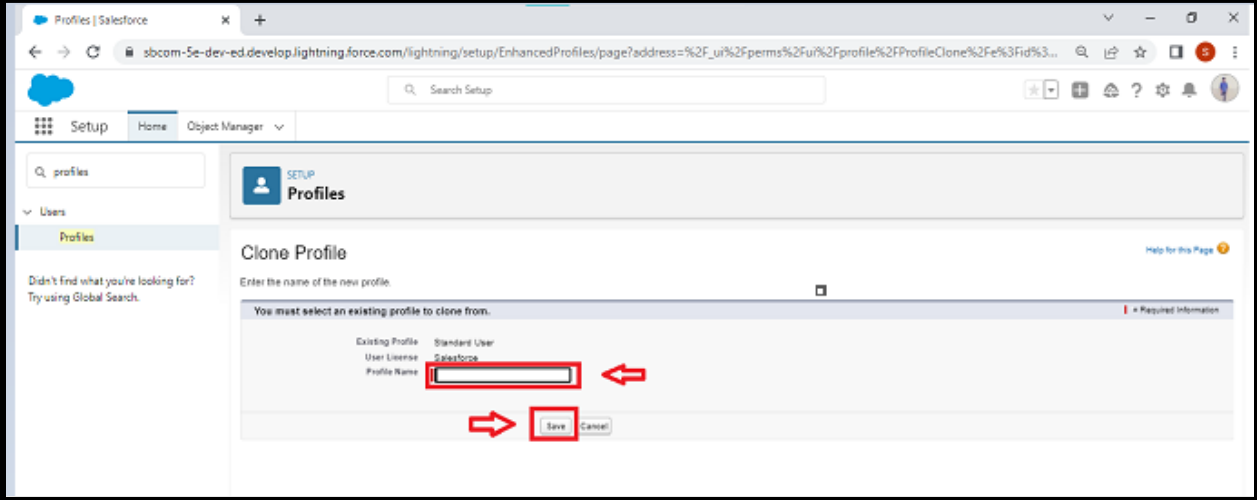
### Activity 1:

### To create a new profile:

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



## 2. Enter a Profile Name



Profiles | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F\_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2F%3Fid%3F...

Setup Home Object Manager

profiles

Users

Profiles

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

SETUP Profiles

### Clone Profile

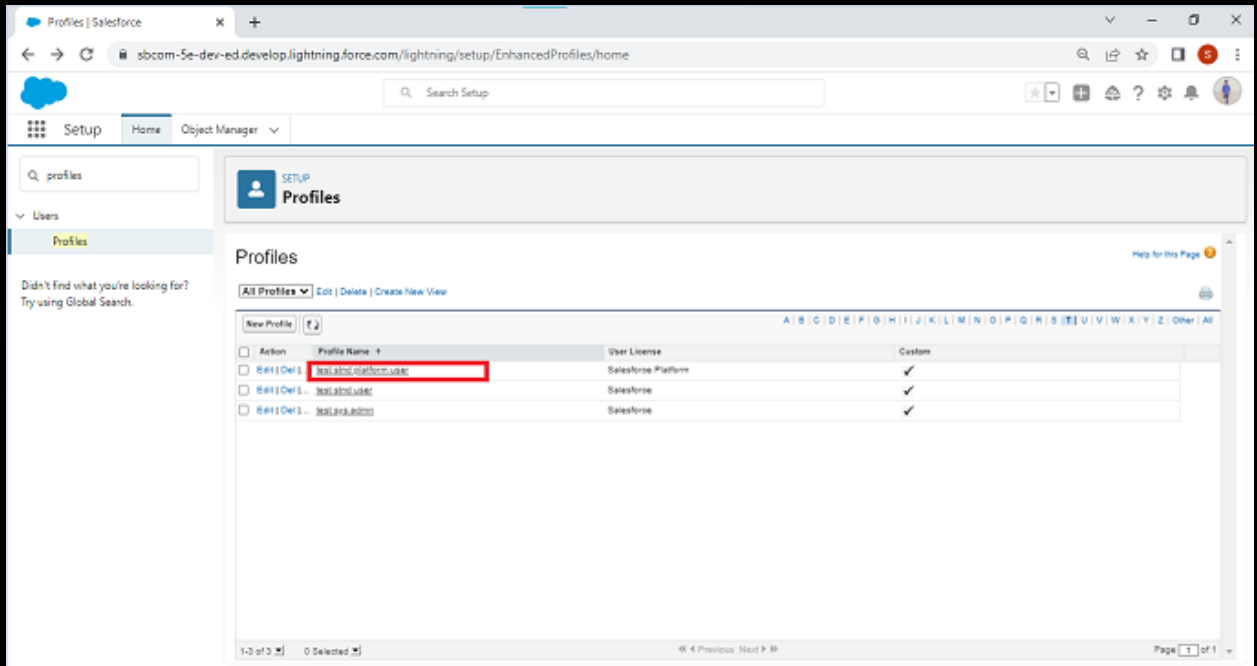
Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User	User License	Profile Name
	Standard User	Salesforce	

Save Cancel

## 3. Click on the new created profile



Profiles | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

profiles

Users

Profiles

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

SETUP Profiles

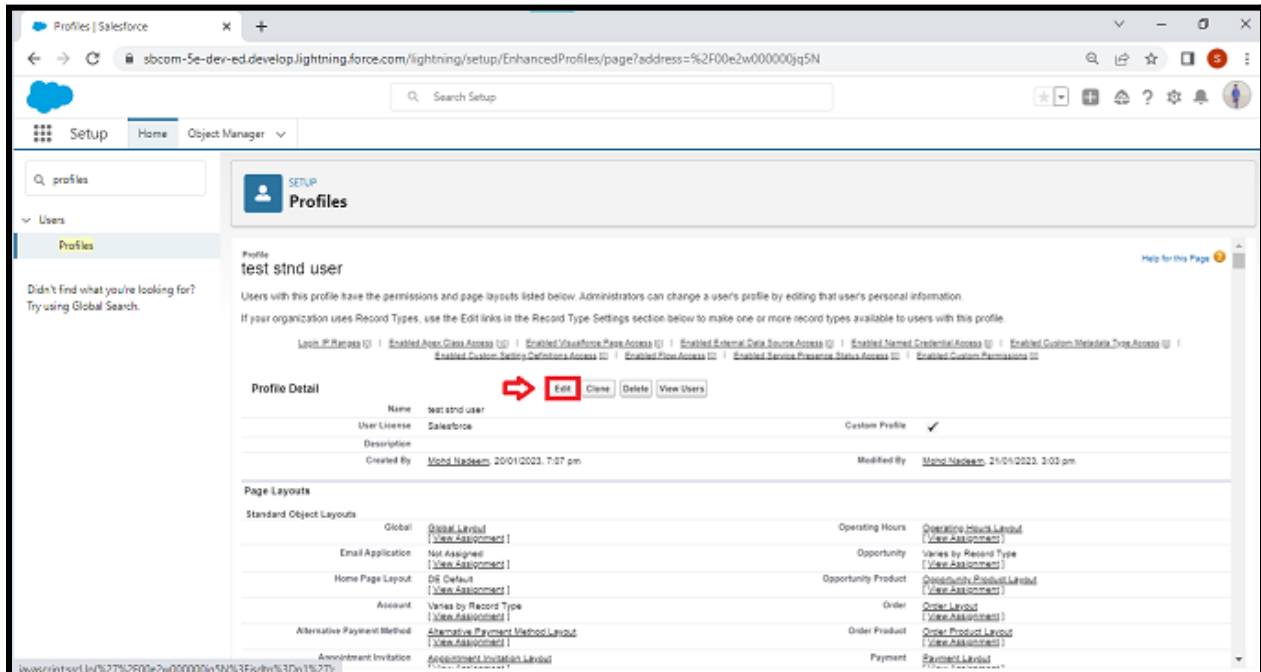
### Profiles

All Profiles | Edit | Delete | Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Delete	Standard User	Salesforce Platform	✓
<input type="checkbox"/> Edit   Delete	Standard User	Salesforce	✓
<input type="checkbox"/> Edit   Delete	Standard User	Salesforce	✓

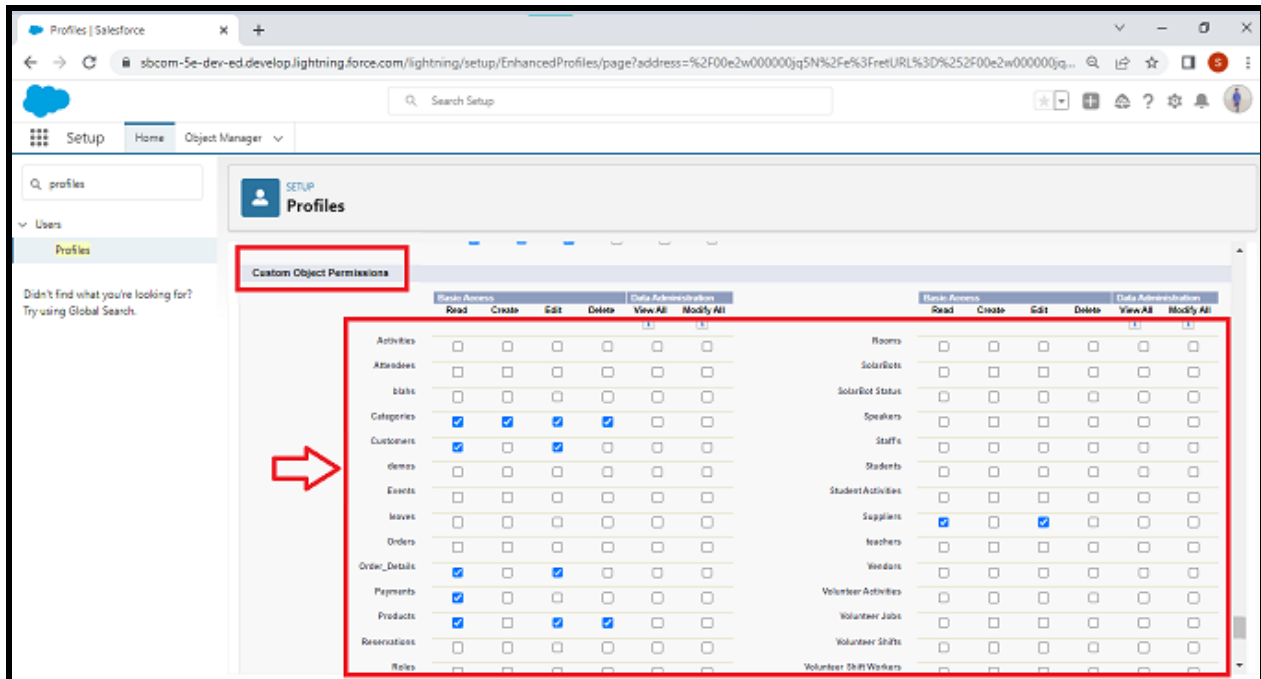
1-2 of 3 0 Selected 4 Previous Next 88 Page 1 of 1

4. While still on the profile page, then click Edit.



The screenshot shows the Salesforce Setup page for Profiles. The profile 'test stnd user' is selected. The 'Edit' button is highlighted with a red box and a red arrow. The page displays various details for the profile, including user license, description, and page layouts.

5. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile



The screenshot shows the 'Custom Object Permissions' section of the Salesforce Profiles page. The 'View All' checkbox for the 'Categories' object is highlighted with a red box and a red arrow. The table lists various objects and their permissions, with checkboxes for 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All'.

Object	Read	Create	Edit	Delete	View All	Modify All
Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attendees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
blisks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
demos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
leaves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order_Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reservations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBot_Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speakers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staffs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
StudentActivities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supplies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Veendars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer Jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer Shifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer Shift Workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Sales Manager → Standard user Profile , Marketing Executive1 and Executive2 → Standard Platform User, Marketing Manager → Standard Platform User For

## **Activity 2:**

### **Create Marketing**

1. Then In The Profile Level Give Read and Create Access to Marketing Executive and Read, Create, Edit, Delete for the Marketing manager
2. Marketing Manager Should Have Access to Marketing Executive

### **Activity3-Sales:**

1. In the Profile Level Sales Manager is Having Create, Edit, Delete
2. For Sales Rep1→ Read, Create, Edit
3. For Sales Rep2→Read, Create, Edit
4. For Sales Rep3→ Read only.

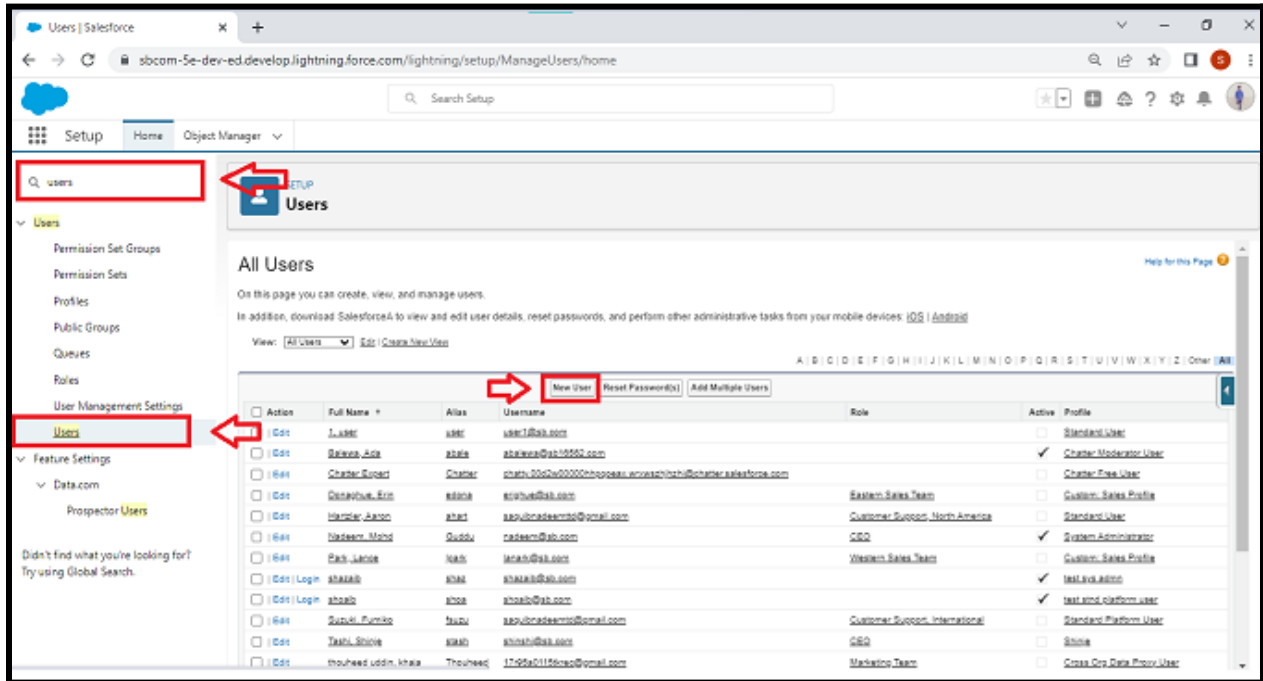
## **Milestone7-New User**

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

## Activity 1:

### Create User

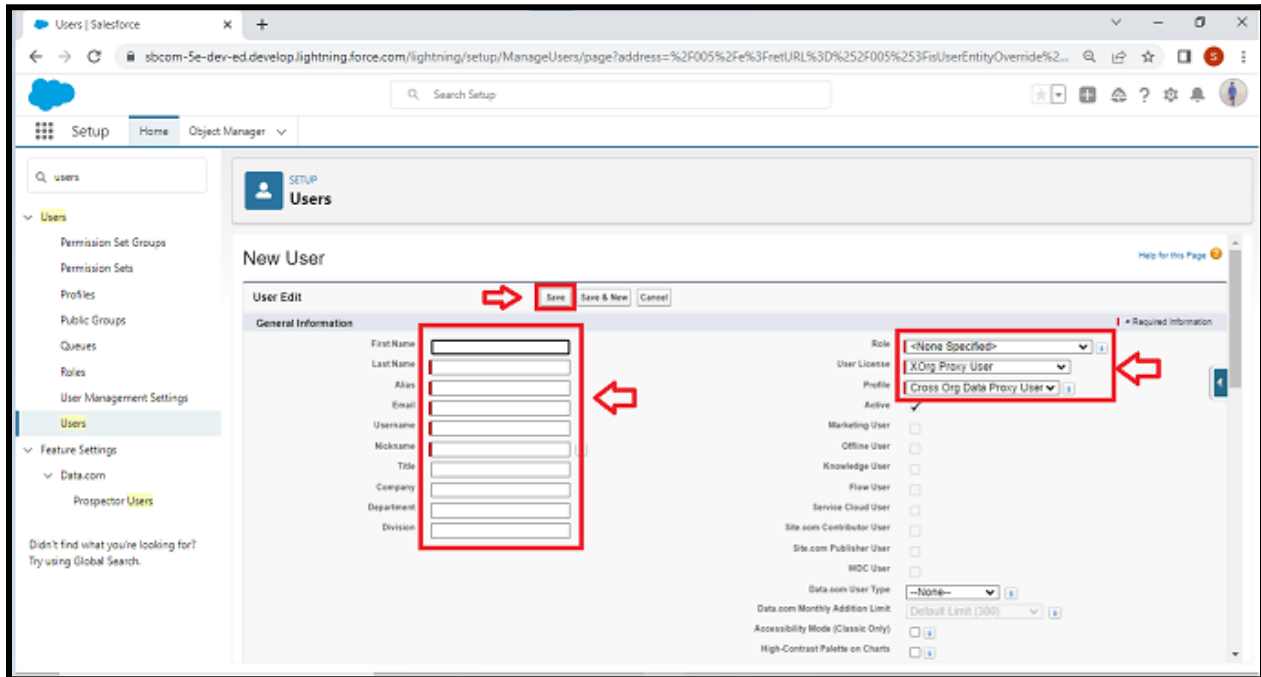
1. Go to setup → type users in quick find box → select users → click New user.



The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Users' link is highlighted. The main content area displays the 'All Users' page. At the top of this page, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A red arrow points to the 'New User' button.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	John Doe	JD	john.doe@company.com	Standard User	<input type="checkbox"/>	Standard User
<input type="checkbox"/>	Jane Smith	JS	jane.smith@company.com	Customer Moderator User	<input checked="" type="checkbox"/>	Customer Moderator User
<input type="checkbox"/>	Charles Brown	CB	charles.brown@company.com	Customer Free User	<input type="checkbox"/>	Customer Free User
<input type="checkbox"/>	Christopher Brown	CB	christopher.brown@company.com	Eastern Sales Team	<input type="checkbox"/>	Custom Sales Profile
<input type="checkbox"/>	Harper Jones	HJ	harper.jones@company.com	Customer Support North America	<input type="checkbox"/>	Standard User
<input type="checkbox"/>	Robert Smith	RS	robert.smith@company.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Patricia Jones	PJ	patricia.jones@company.com	Western Sales Team	<input type="checkbox"/>	Custom Sales Profile
<input type="checkbox"/>	John Doe	JD	john.doe@company.com	test sys admin	<input checked="" type="checkbox"/>	test sys admin
<input type="checkbox"/>	John Doe	JD	john.doe@company.com	test sys admin	<input checked="" type="checkbox"/>	test sys admin
<input type="checkbox"/>	John Doe	JD	john.doe@company.com	Customer Support International	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	John Doe	JD	john.doe@company.com	CEO	<input type="checkbox"/>	Stake
<input type="checkbox"/>	John Doe	JD	john.doe@company.com	Marketing Team	<input type="checkbox"/>	Custom Data Flow User

2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.



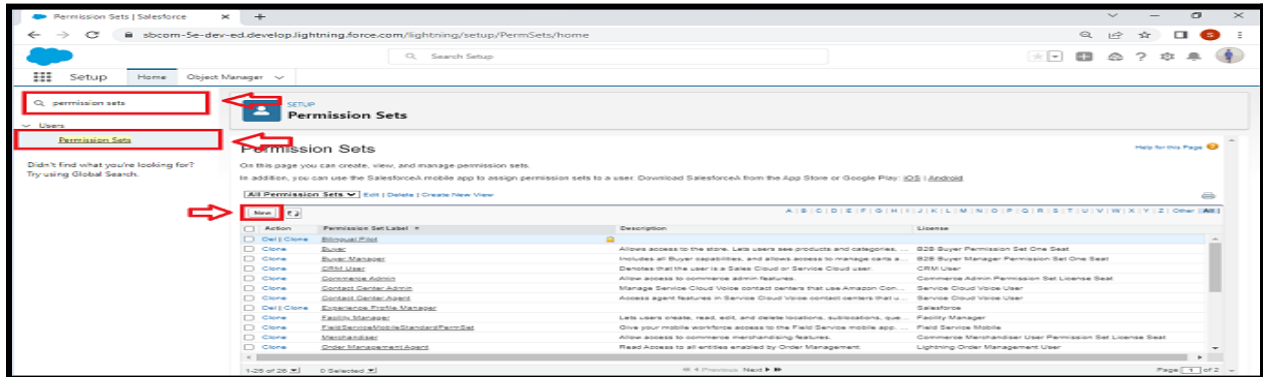
## Milestone8-Permission Set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

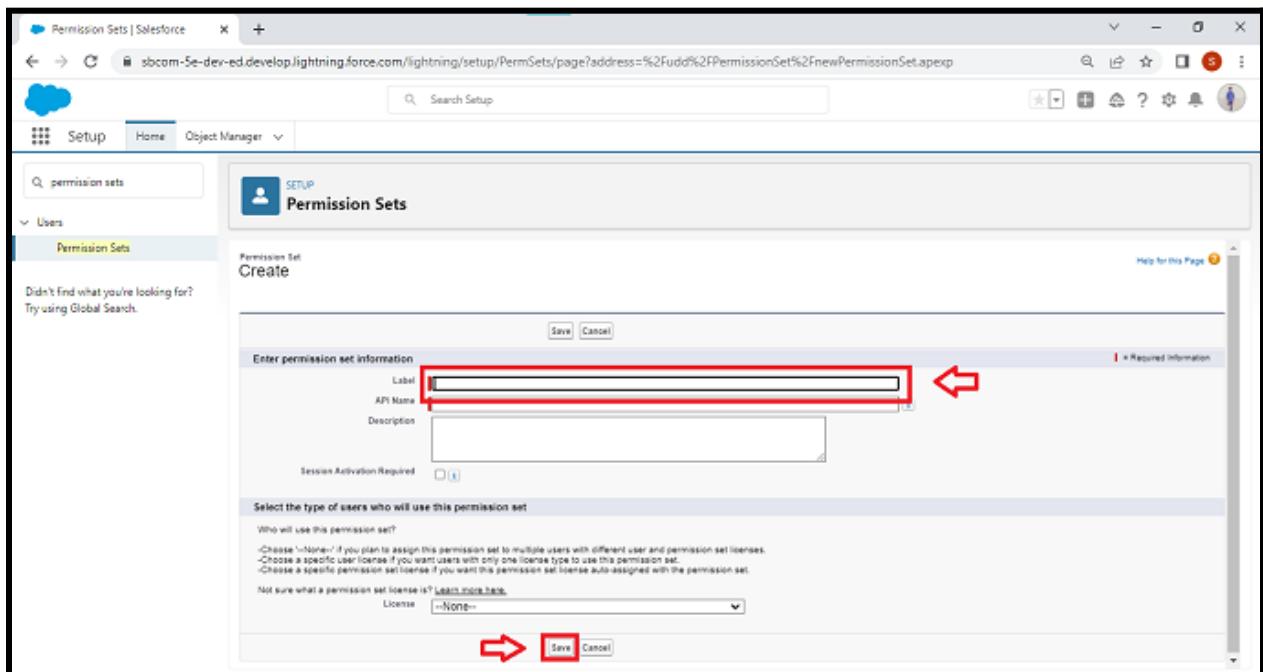
## Activity 1:

### Create the Permission Sets

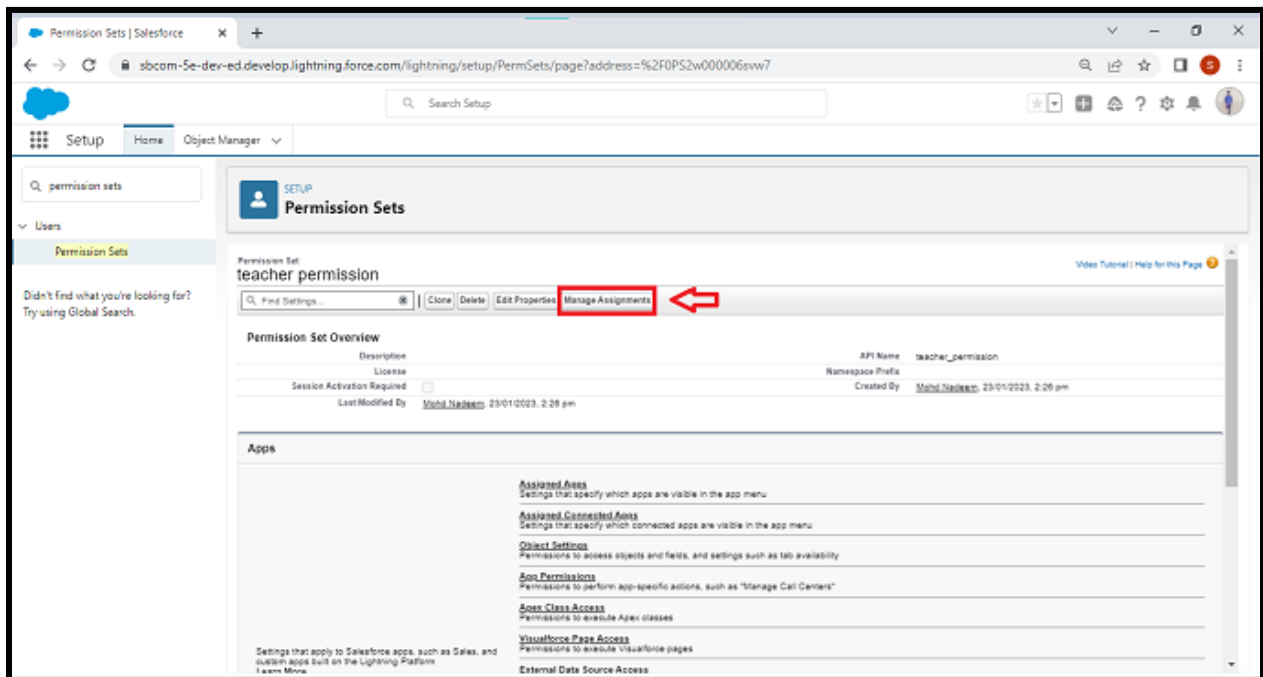
1. Go to setup → type “permission sets” in quick search → select permission sets → New.



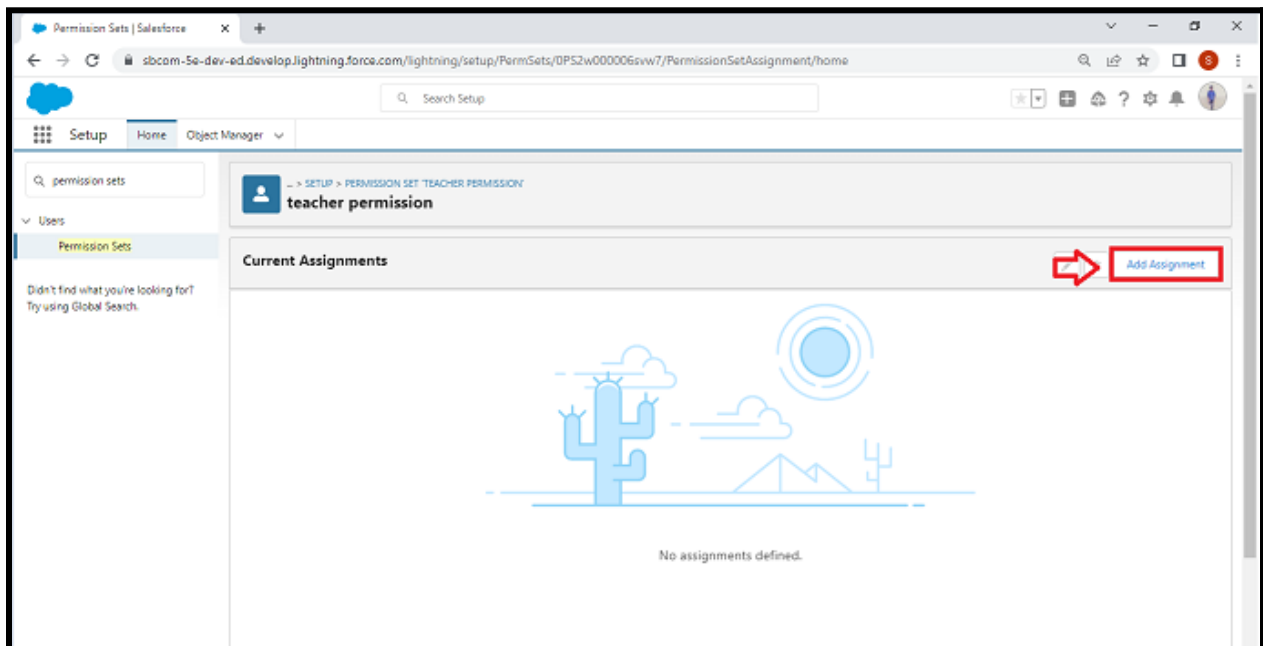
2. Enter the label name → save.



3. After saving the permission click on the Manage assignment

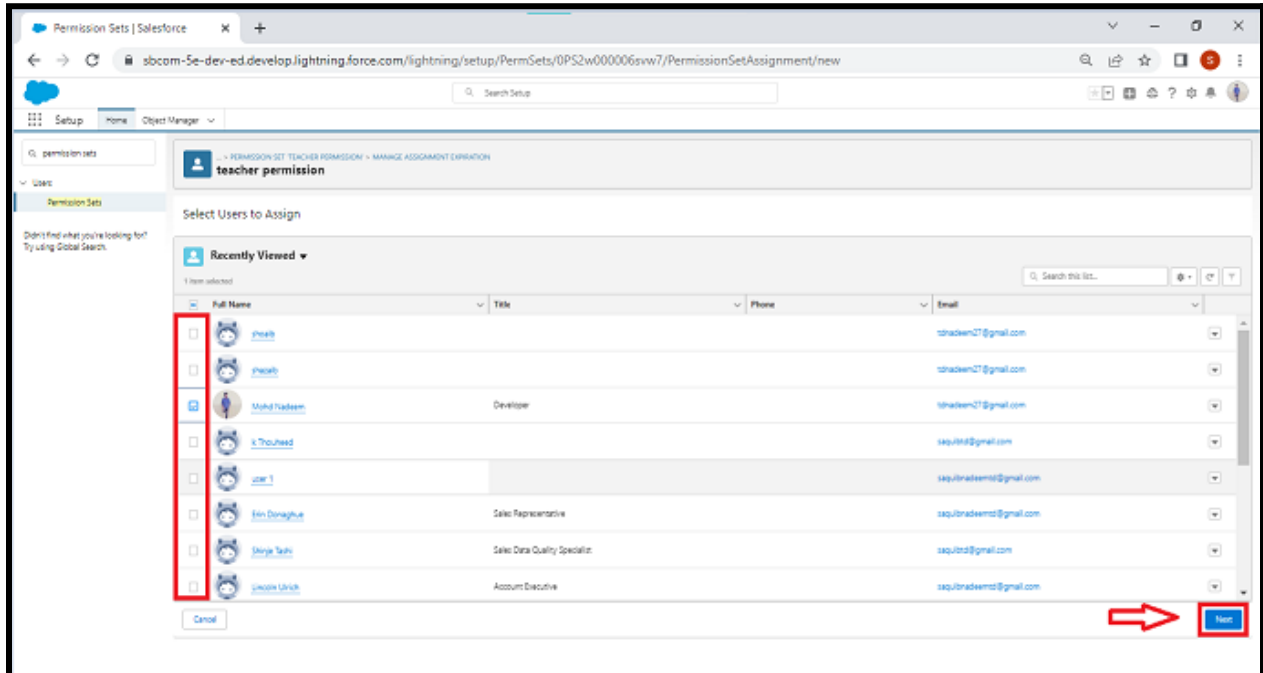


4. Now click on the Add Assignment





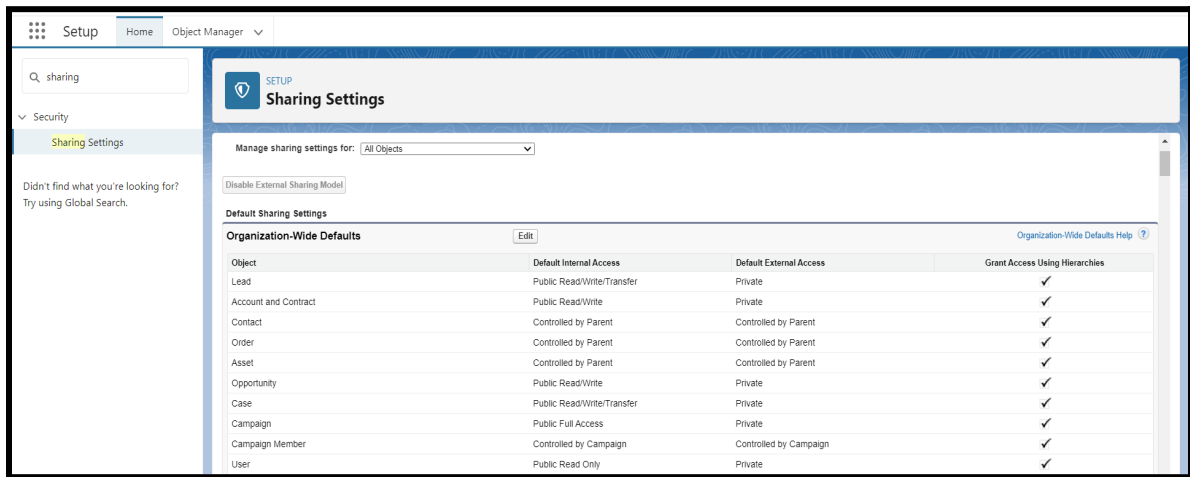
- Now select the users and click on save



## Activity1:

### Create OWD Setting

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



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"/>

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



Work Type Group	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Lead	Private	Private	<input checked="" type="checkbox"/>
Rent	Private	Private	<input checked="" type="checkbox"/>

**Other Settings**

Standard Report Visibility ☒ [?](#) Manual User Record Sharing ☐ [?](#) Manage

[Save](#) [Cancel](#)

6. This Setting is for all the User Which have been Created

## Activity 2:

### Marketing

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

### Sales:

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

## Milestone10-Report

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

### Types of Reports in Salesforce

Tabular

Summary

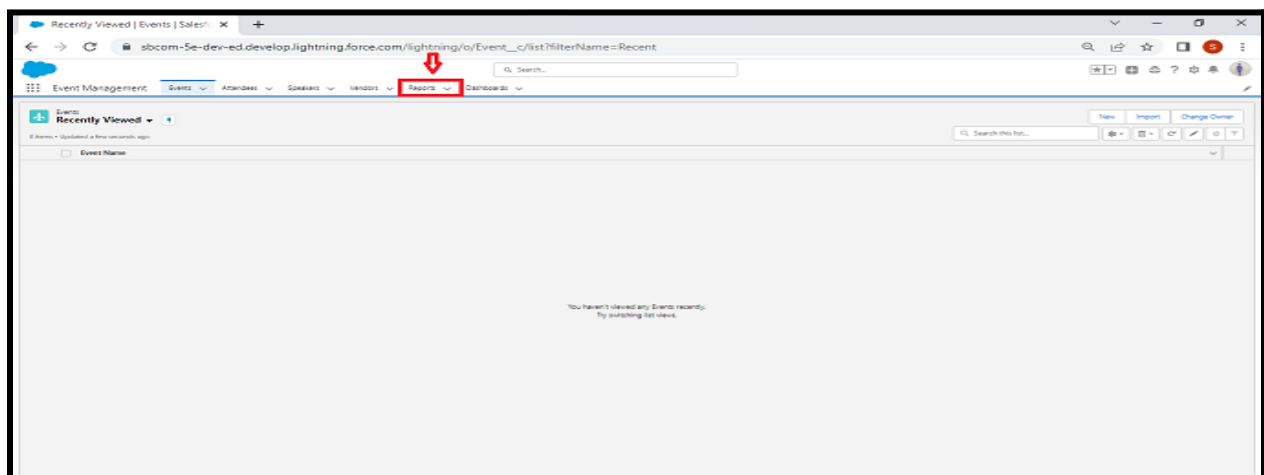
Matrix

Joined Reports

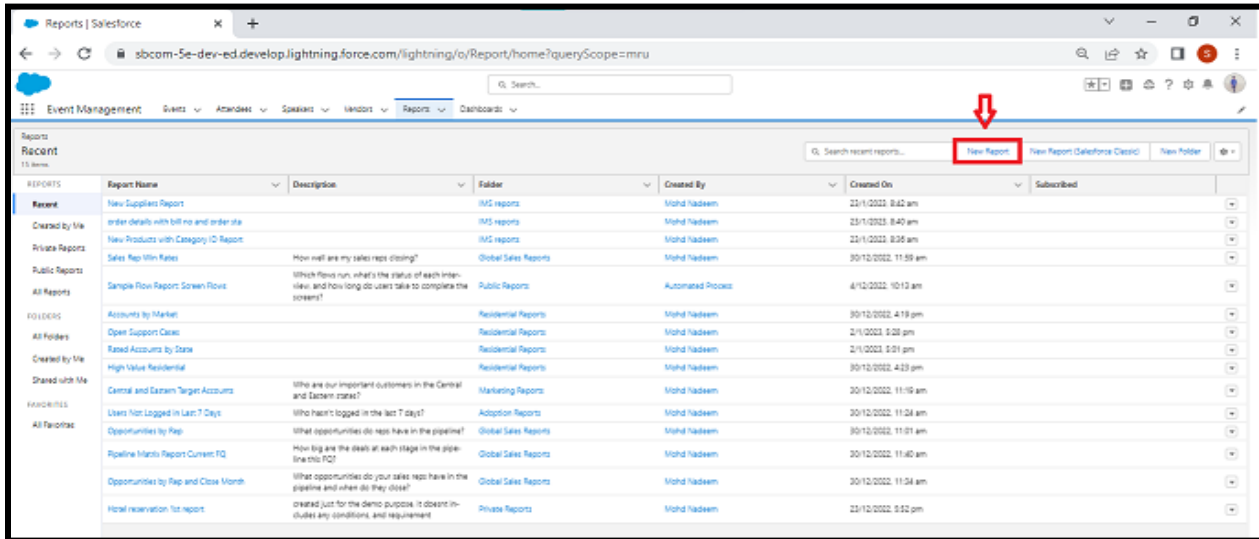
## Activity 1:

### Create Report-

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



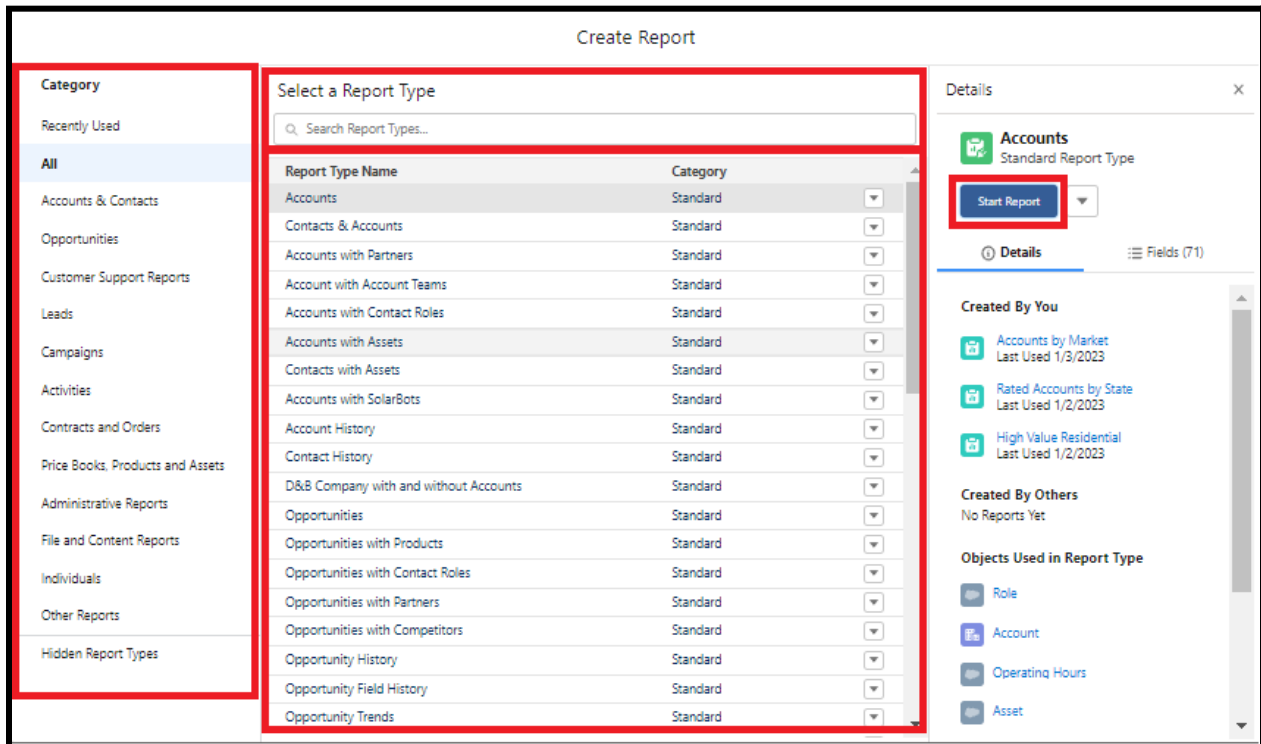
## 2. Click New Report



The screenshot shows the Salesforce Reports interface. A red arrow points to the 'New Report' button in the top right corner of the 'Recent' reports list. The interface includes a search bar, navigation tabs, and a table of recent reports.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Suppliers Report		IMS reports	Mohd Nadeem	23/1/2023, 8:42 am	
Created by Me	Order details with bill no and order sta		IMS reports	Mohd Nadeem	23/1/2023, 8:40 am	
Private Reports	New Products with Category ID Report		IMS reports	Mohd Nadeem	23/1/2023, 8:36 am	
Public Reports	Sales Rep Win Rates	How well are my sales reps closing?	Global Sales Reports	Mohd Nadeem	20/12/2022, 11:59 am	
All Reports	Sample Flow Report Screen Flows	Which flows run, what's the status of each inter- view, and how long do users take to complete the screen?	Public Reports	Automated Process	4/12/2022, 10:13 am	
FOLDERS	Accounts by Market		Residential Reports	Mohd Nadeem	30/12/2022, 4:19 pm	
All Folders	Open Support Cases		Residential Reports	Mohd Nadeem	2/1/2023, 9:28 pm	
Created by Me	Rated Accounts by State		Residential Reports	Mohd Nadeem	2/1/2023, 9:01 pm	
Shared with Me	High Value Residential		Residential Reports	Mohd Nadeem	30/12/2022, 4:29 pm	
FAVORITES	Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern areas?	Marketing Reports	Mohd Nadeem	20/12/2022, 11:16 am	
All Favorites	Users Not Logged in Last 7 Days	Who hasn't logged in the last 7 days?	Adoption Reports	Mohd Nadeem	20/12/2022, 11:24 am	
	Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:07 am	
	Pipeline Month Report Current IQ	How long are the deals at each stage in the pipeline?	Global Sales Reports	Mohd Nadeem	20/12/2022, 11:40 am	
	Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Mohd Nadeem	20/12/2022, 11:34 am	
	Hotel reservation Not report	created just for the demo purpose, it doesn't include any conditions, and requirement	Private Reports	Mohd Nadeem	23/12/2022, 9:52 pm	

## 3. Select report type from category or from report type panel or from search panel → click on start report.



The screenshot shows the 'Create Report' dialog in Salesforce. The 'Select a Report Type' panel is active, displaying a list of report types. A red box highlights the 'Start Report' button in the 'Details' panel on the right.

**Category**

- Recently Used
- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals
- Other Reports
- Hidden Report Types

**Select a Report Type**

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Accounts with SolarBots	Standard
Account History	Standard
Contact History	Standard
D&B Company with and without Accounts	Standard
Opportunities	Standard
Opportunities with Products	Standard
Opportunities with Contact Roles	Standard
Opportunities with Partners	Standard
Opportunities with Competitors	Standard
Opportunity History	Standard
Opportunity Field History	Standard
Opportunity Trends	Standard

**Details**

**Accounts**  
Standard Report Type

**Start Report**

**Created By You**

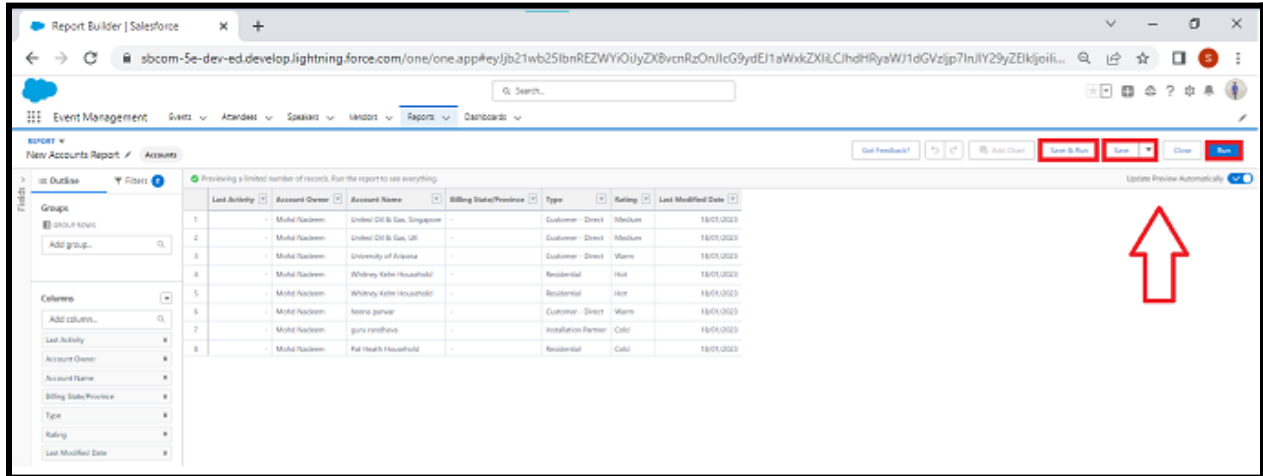
- Accounts by Market  
Last Used 1/3/2023
- Rated Accounts by State  
Last Used 1/2/2023
- High Value Residential  
Last Used 1/2/2023

**Created By Others**  
No Reports Yet

**Objects Used in Report Type**

- Role
- Account
- Operating Hours
- Asset

4. Customize your report, then save or run it.



The screenshot shows the Salesforce Report Builder interface. The report is titled "New Accounts Report" and is for the "Accounts" object. The report is in "Outline" view. The table shows 8 rows of data with columns: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. A red arrow points to the "Save & Run" button in the top right corner.

Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	Mukul Nadeem	United Oil & Gas, Singapore	-	Customer - Direct	Medium	18/01/2023
2	Mukul Nadeem	United Oil & Gas, UK	-	Customer - Direct	Medium	18/01/2023
3	Mukul Nadeem	University of Arizona	-	Customer - Direct	Warm	18/01/2023
4	Mukul Nadeem	Whitney Kalle Household	-	Residential	Hot	18/01/2023
5	Mukul Nadeem	Whitney Kalle Household	-	Residential	Hot	18/01/2023
6	Mukul Nadeem	Neena parmer	-	Customer - Direct	Warm	18/01/2023
7	Mukul Nadeem	guru randhawa	-	Installation Partner	Cold	18/01/2023
8	Mukul Nadeem	Pat Heath Household	-	Residential	Cold	18/01/2023

### Create Report for following Condition

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

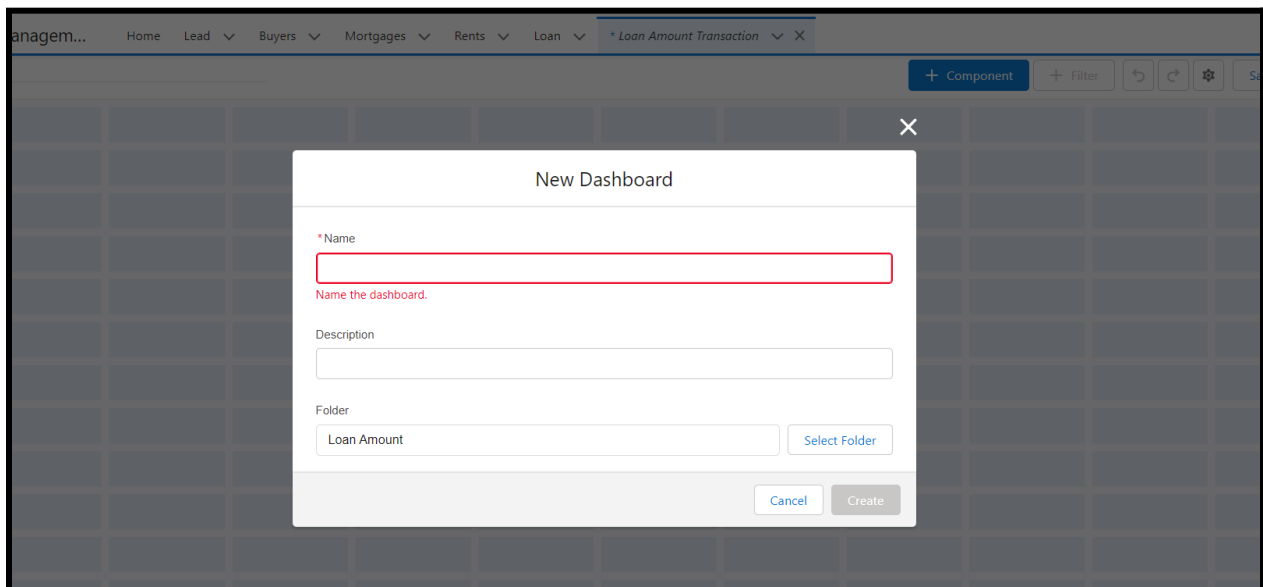
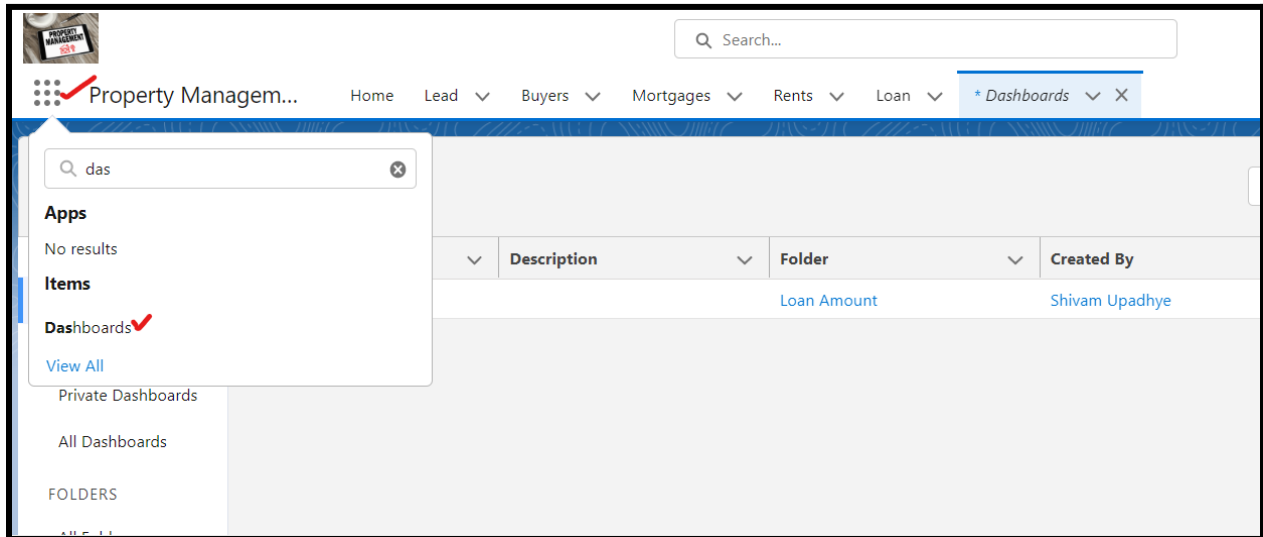
### Milestone11-Dashboards

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

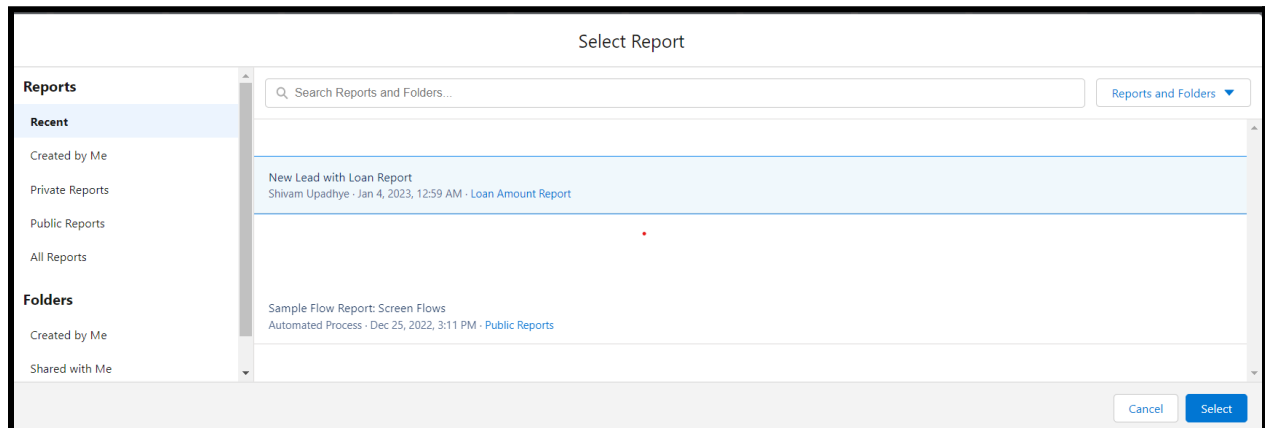
## Activity1:

### Create dashboards

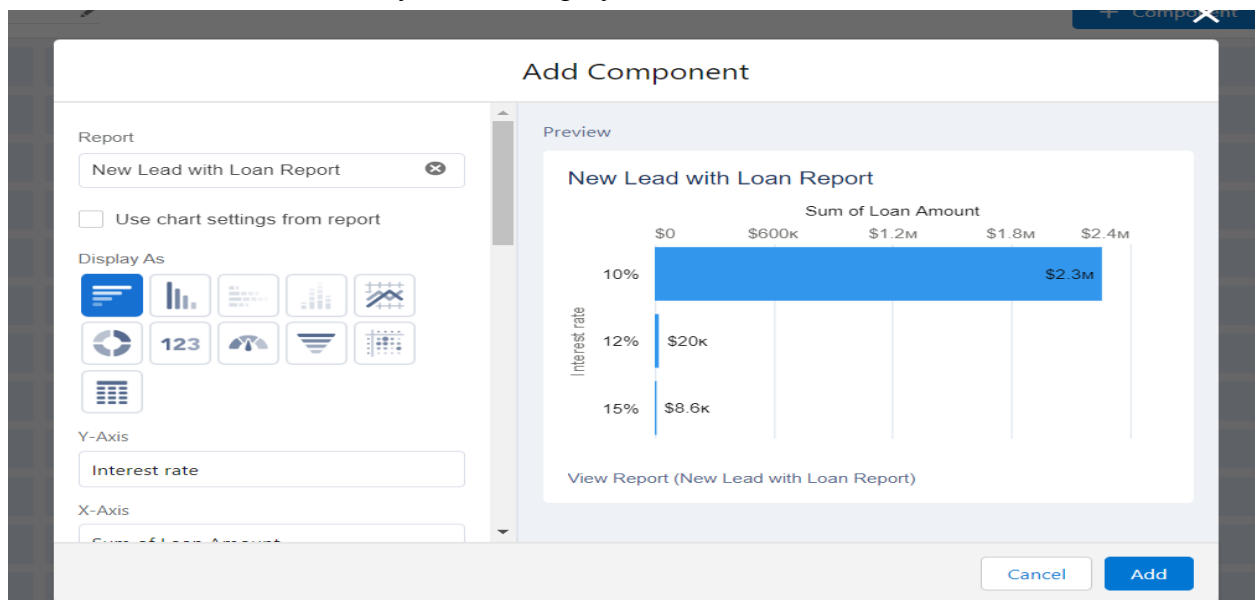
1. Go to the App Launcher and select the Dashboards
2. Select add component

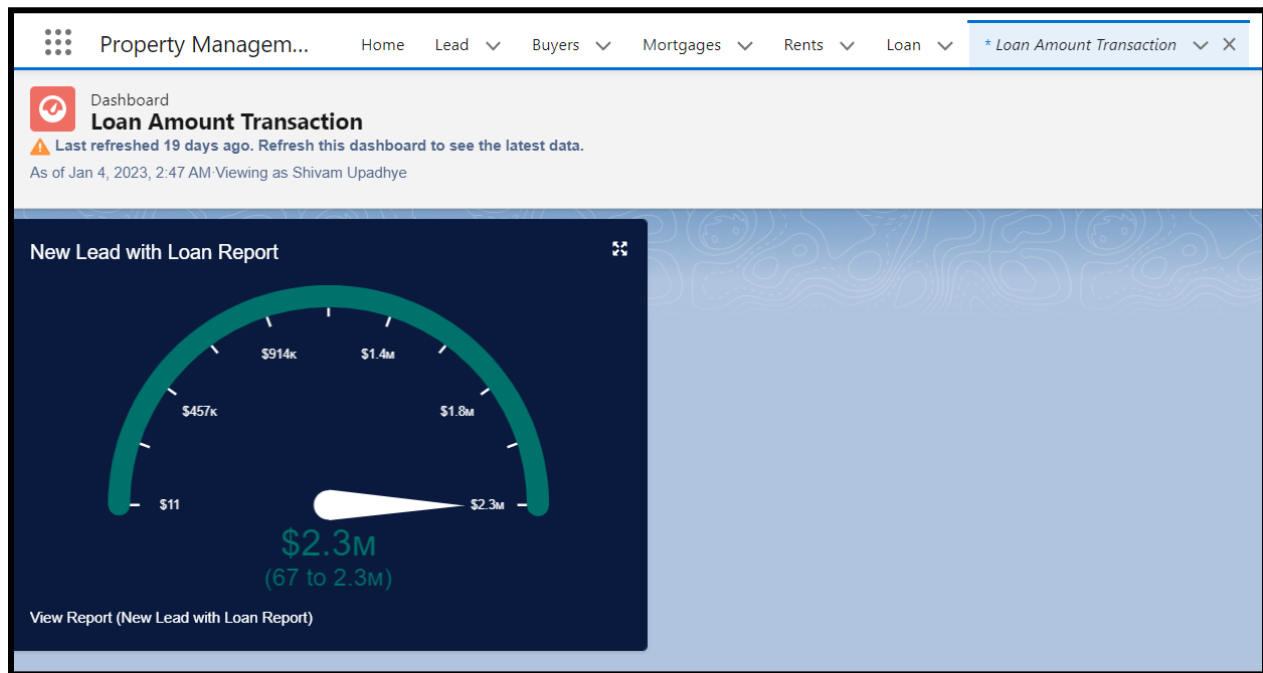


3. Select the folder select the following option new lead with loan Amount



#### 4. Select in which format you want display chart





## Activity2:

### Create Dashboard

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