PROPERTY MANAGEMENT APPILICATION USING SALESFORCE

GOVERNMENT OF TAMILNADU

Naan Muthalvan - Project-Based Experiential Learning

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

Submitted by

S.SARANYA(20321TR027)

A.SATHIYAVANI MUTHU(20321TR028)

S.SHINY(20321TR029)

S.SOWMIYA(20321TR030)

Under the guidance of

Mrs. T.ESWARI.M.Sc.,B.ed.,M.phil.

Assistant Professor

PG and Research Department of Mathematics

M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

B(Affiliated To Mother Teresa Women□s University, Kodaikanal)

Reaccredited with □A□ Grade by NAAC

DINDIGUL-624001.

APRIL - 2023

M.V.MUTHIAH GOVERNMENT ARTS COLLEG FOR WOMEN
(Affiliated to Mother Teresa Women's University, Kodaikanal)
Reaccredited with "A" Grade by NAAC
Dindigul - 624 001

PG & RESEARCH DEPARTMENT OF MATHEMATICS

BONAFIDE CERTIFICATE

This is to certify that this is a bonafide record of the project entitled, **"PROPERTY MANAGEMANT APPILICATION USING SALESFORCE** done **by Ms.S.SHINY(20321TR029), Ms.S.SARANYA(20321TR027),Ms.A.SATHIYAVANI MUTHU(20321TR028) and Ms.S.SOWMIYA(20321TR030)** This is submitted in partial fulfillment for the award of the degree of **Bachelor of Science in Mathematics in M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN,DINDIGUL** during the period of December 2022 to April 2023.

Project Mentor(s) **Head of the Department**

Submitted for viva-voice Examination held on_____

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1 INTRODUCTION

1.1 Overview

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 dashboards so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal.

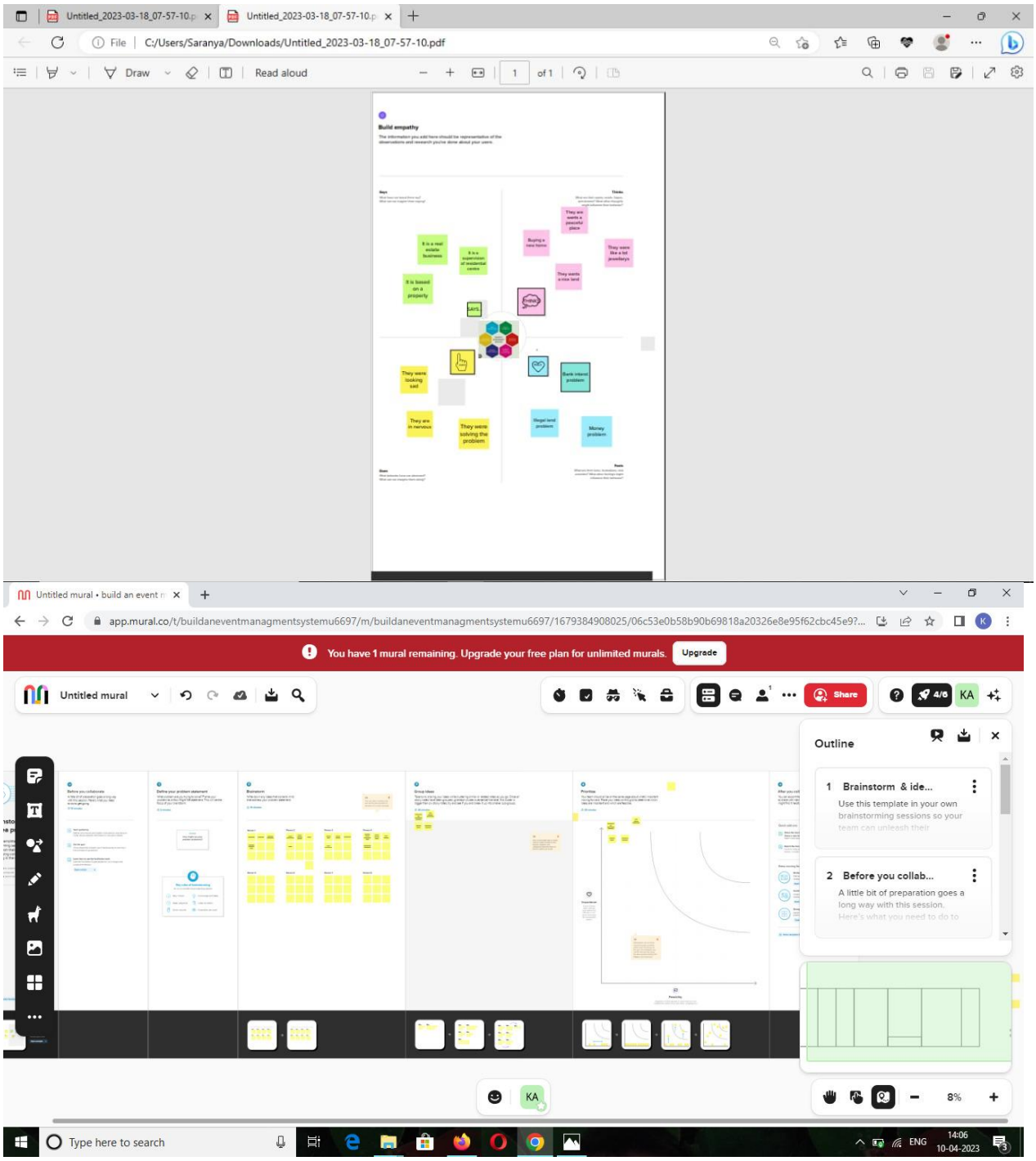
1.2 Purpose

- Salesforce property management enables the realty managers to keep track of crucial data about financial and household properties incorporating associated cash flow, primary tenants, and occupancy rates.
- Property managers assist owners in creating budgets, advertise rental properties, qualify tenants, and collect rent.
- Property Management helps marketing, sales, commerce,service and IT team work as one from anywhere.
- Track emails, calls, and set tasks to connect with the right buyers, sellers, and renters at the right time.

2.Problem Definition& Design Thinking

2.1 Empathy Map

2.2 Ideation & Brainstorming



3. **RESULT**

a.Data Model

<table>
<tr><th>Object name</th><th>Fields in the Object</th></tr>
<tr><td>Buy</td><td>
<table>
<tr><th>Field label</th><th>Data type</th></tr>
<tr><td>Property type</td><td>Picklist</td></tr>
<tr><td>Discount</td><td>Percentage</td></tr>
<tr><td>State</td><td>Picklist</td></tr>
<tr><td>City</td><td>Picklist</td></tr>
<tr><td>Annual amount to be paid</td><td>Picklist</td></tr>
</table>
</td></tr>
<tr><td>Rent</td><td>
<table>
<tr><th>Field label</th><th>Data type</th></tr>
<tr><td>Rent</td><td>Auto number</td></tr>
<tr><td>Rental City</td><td>Text</td></tr>
<tr><td>BHK type</td><td>Picklist</td></tr>
</table>
</td></tr>
<tr><td>Loan</td><td>
<table>
<tr><th>Field label</th><th>Data type</th></tr>
<tr><td>Loan Id</td><td>Auto number</td></tr>
<tr><td>Interest rate</td><td>Currency</td></tr>
<tr><td>Term</td><td>Number</td></tr>
<tr><td>Annual Loan</td><td>Number</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><td></td><td></td><td><table><tr><td>Total loan Instalments</td><td>Number</td></tr><tr><td>LoanRepayment</td><td>Currency</td></tr><tr><td>Loan amount</td><td>Formula</td></tr></table></td><td></td></tr>
<tr><td>Student</td><td colspan="3"><table><tr><td>Field label</td><td>Data type</td></tr><tr><td>Lead</td><td>Auto Number</td></tr><tr><td>State</td><td>Picklist</td></tr><tr><td>City</td><td>Picklist</td></tr><tr><td>Email</td><td>Email</td></tr><tr><td>Phone</td><td>Phone</td></tr></table></td></tr>
</table>

a. Activity and Screenshot

Salesforce:

Creating Developer Account Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :

a. First name & Last name

b. Email

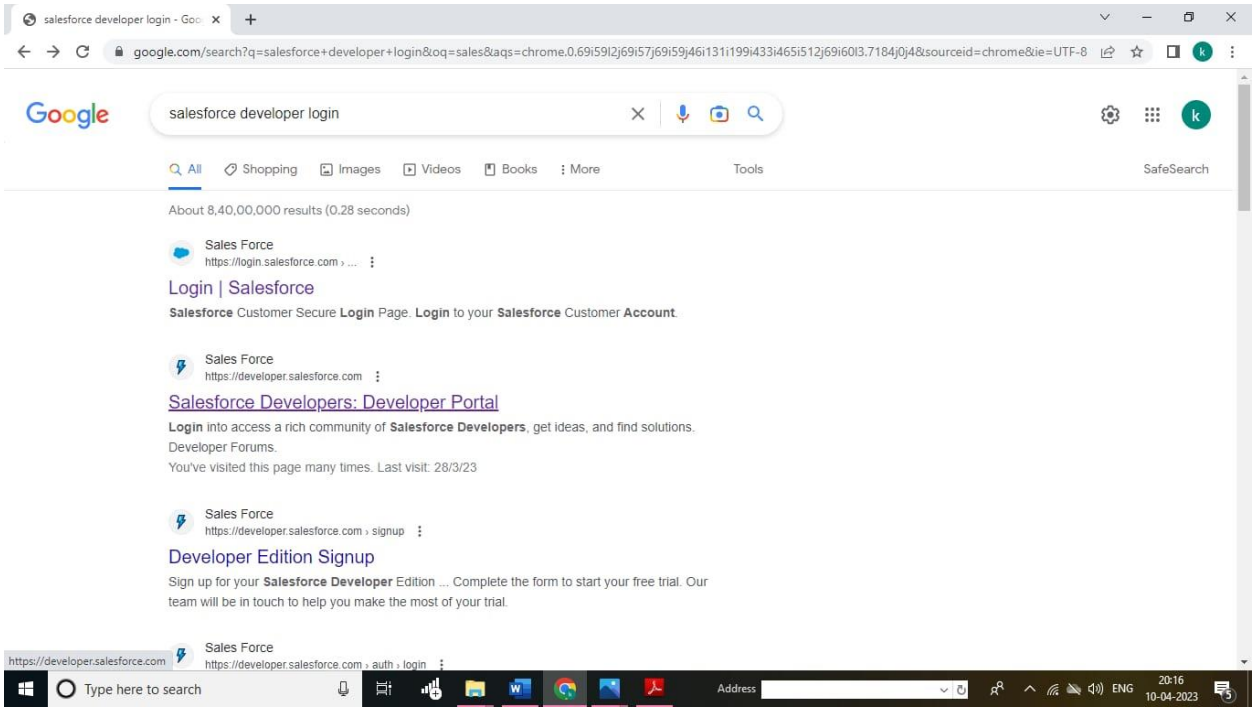
c. Role : Developer

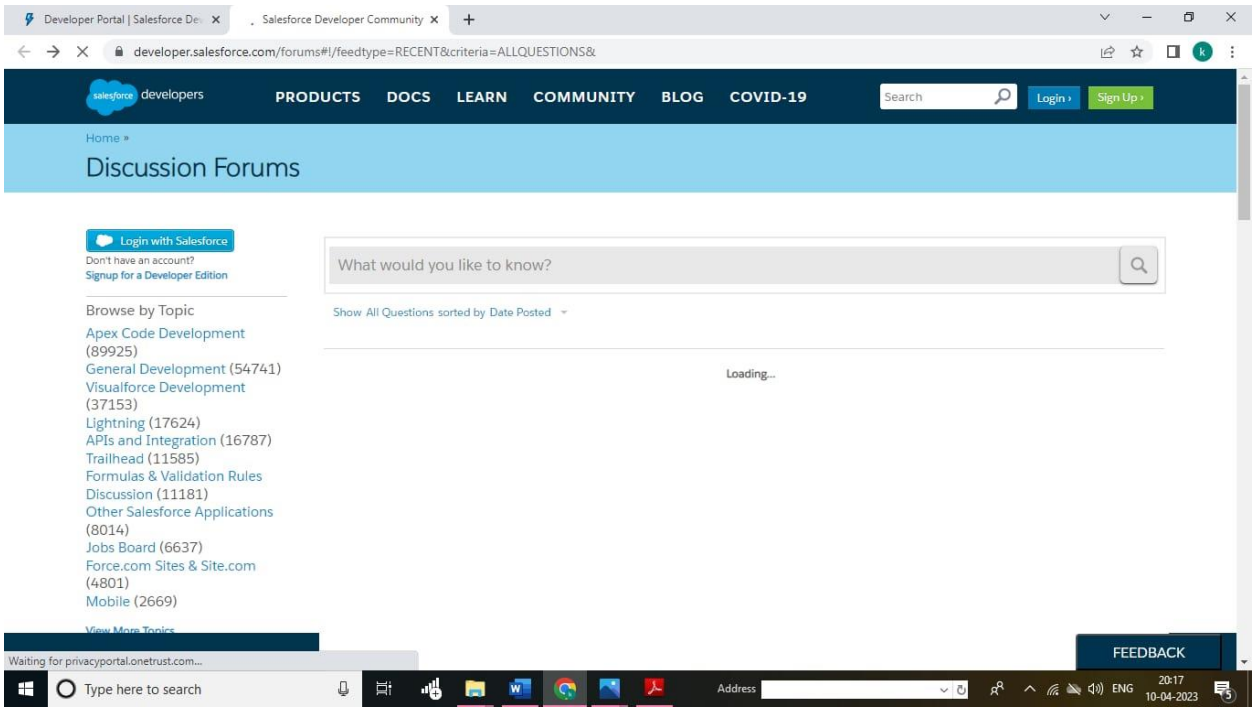
d. Company : College Name

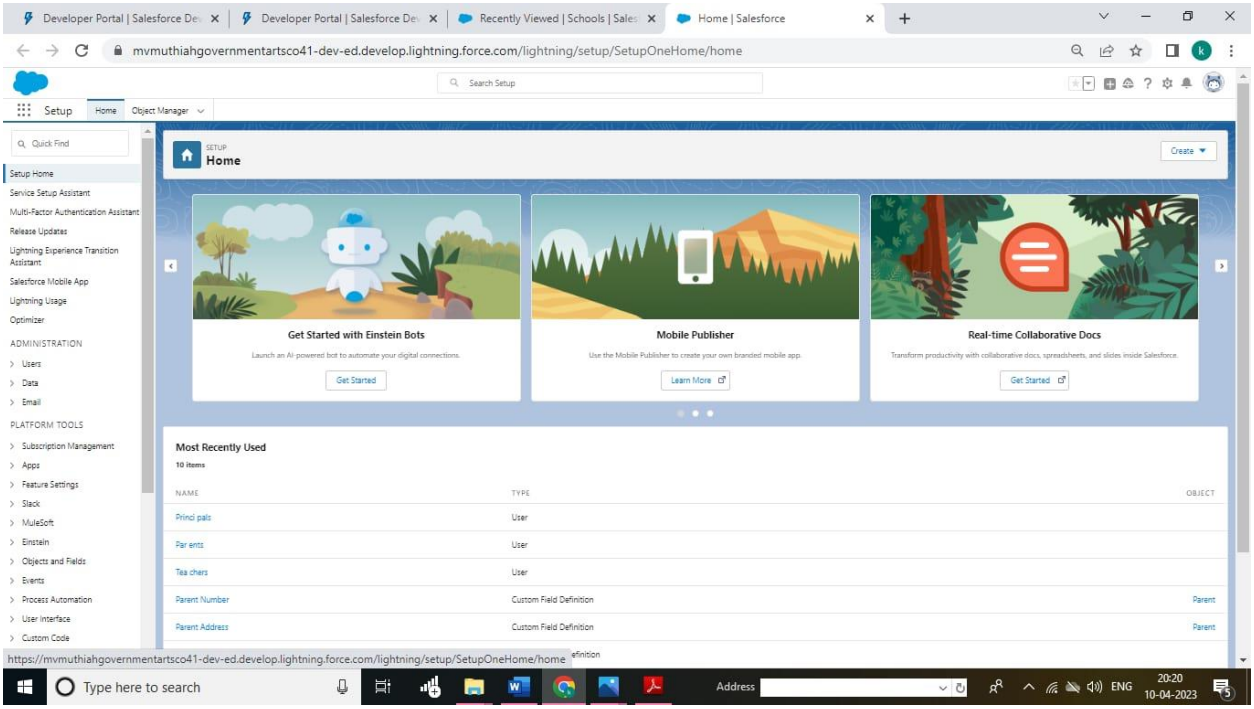
e. County : India

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 Click on sign up after filling these.


salesforce developer login - Goo
google.com/search?q=salesforce+developer+login&oq=sales&aqs=chrome.0.69i59l2j69i57j69i59j46i131i199i433i465i512j69i60l3.7184j0j4&sourceid=chrome&ie=UTF-8
Google
salesforce developer login
All
Shopping
Images
Videos
Books
More
Tools
SafeSearch
About 8,40,00,000 results (0.28 seconds)
Sales Force
https://login.salesforce.com › ...
Login | Salesforce
Salesforce Customer Secure Login Page. Login to your Salesforce Customer Account.
Sales Force
https://developer.salesforce.com
Salesforce Developers: Developer Portal
Login into access a rich community of Salesforce Developers, get ideas, and find solutions.
Developer Forums.
You've visited this page many times. Last visit: 28/3/23
Sales Force
https://developer.salesforce.com › signup
Developer Edition Signup
Sign up for your Salesforce Developer Edition ... Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.
Sales Force
https://developer.salesforce.com › auth › login
https://developer.salesforce.com
Type here to search
Address
ENG
20:16
10-04-2023


Developer Portal | Salesforce De
Salesforce Developer Community
developer.salesforce.com/forums#!/feedtype=RECENT&criteria=ALLQUESTIONS&
developers
PRODUCTS
DOCS
LEARN
COMMUNITY
BLOG
COVID-19
Search
Login ›
Sign Up ›
Home »
Discussion Forums
Login with Salesforce
Don't have an account?
Signup for a Developer Edition
Browse by Topic
Apex Code Development (89925)
General Development (54741)
Visualforce Development (37153)
Lightning (17624)
APIs and Integration (16787)
Trailhead (11585)
Formulas & Validation Rules Discussion (11181)
Other Salesforce Applications (8014)
Jobs Board (6637)
Force.com Sites & Site.com (4801)
Mobile (2669)
View More Topics
What would you like to know?
Show All Questions sorted by Date Posted
Loading...
FEEDBACK
Waiting for privacyportal.onetrust.com...
Type here to search
Address
ENG
20:17
10-04-2023



Mile Stone 2: 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

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

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

Create Object Loan

7. To create an object:

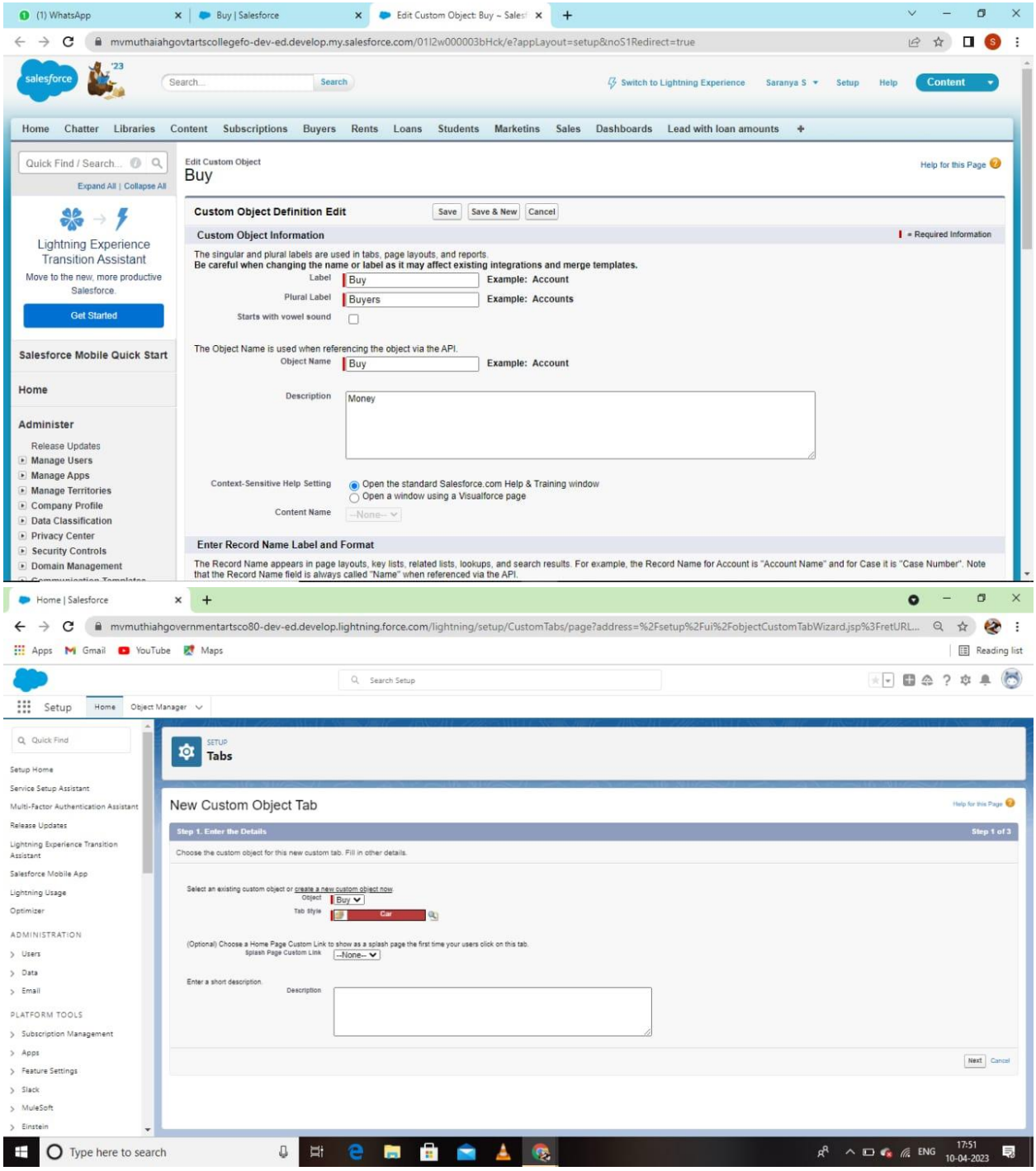
8. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

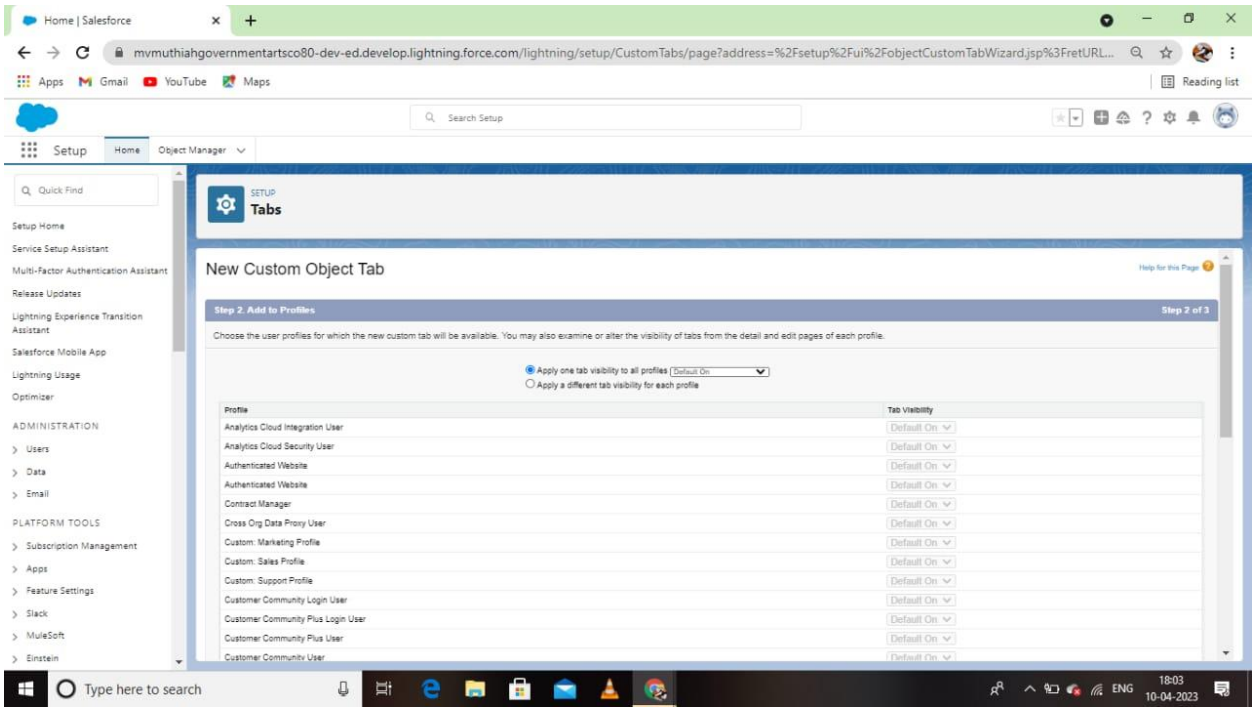
9. Enter the label name →Loan

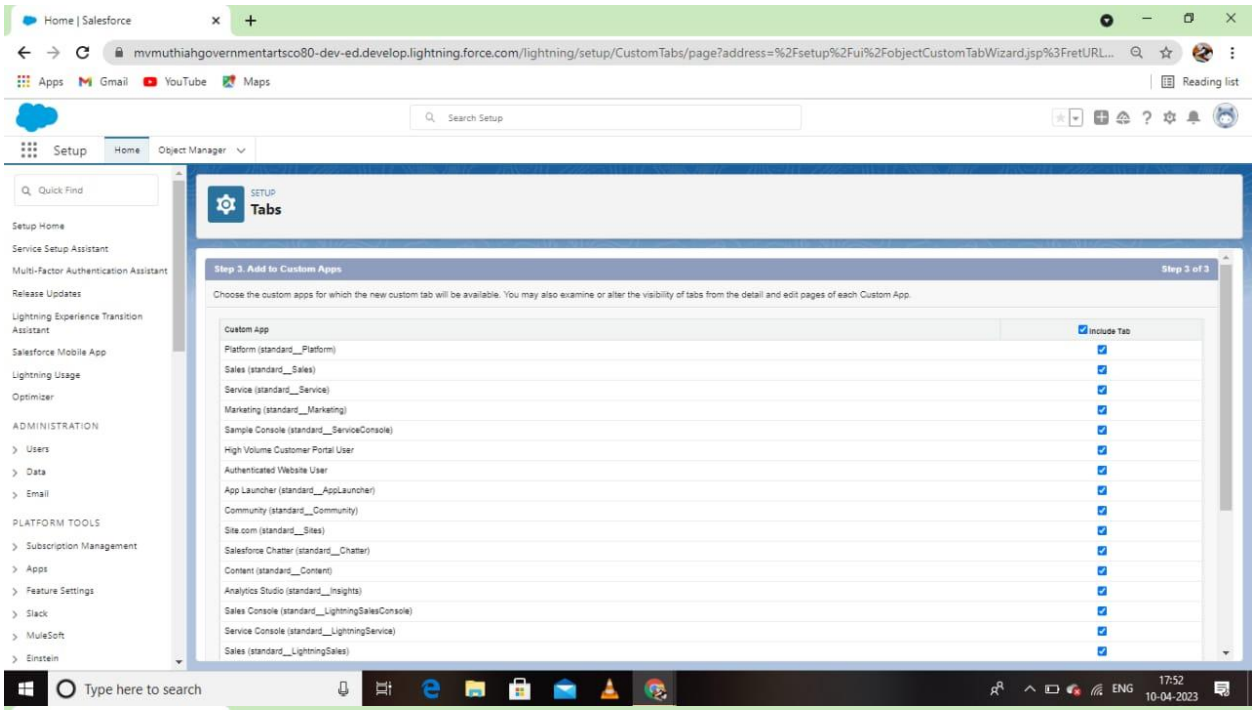
10. Plural label name→ Loans

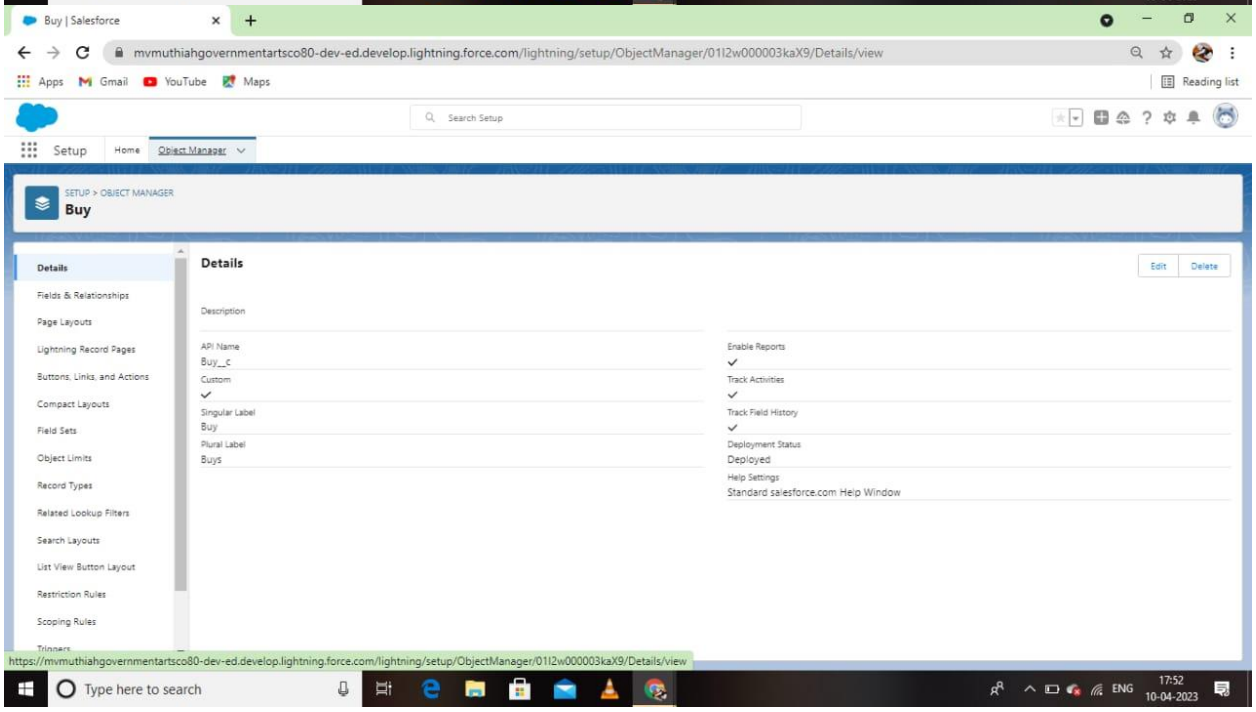
11. Click on Allow reports,

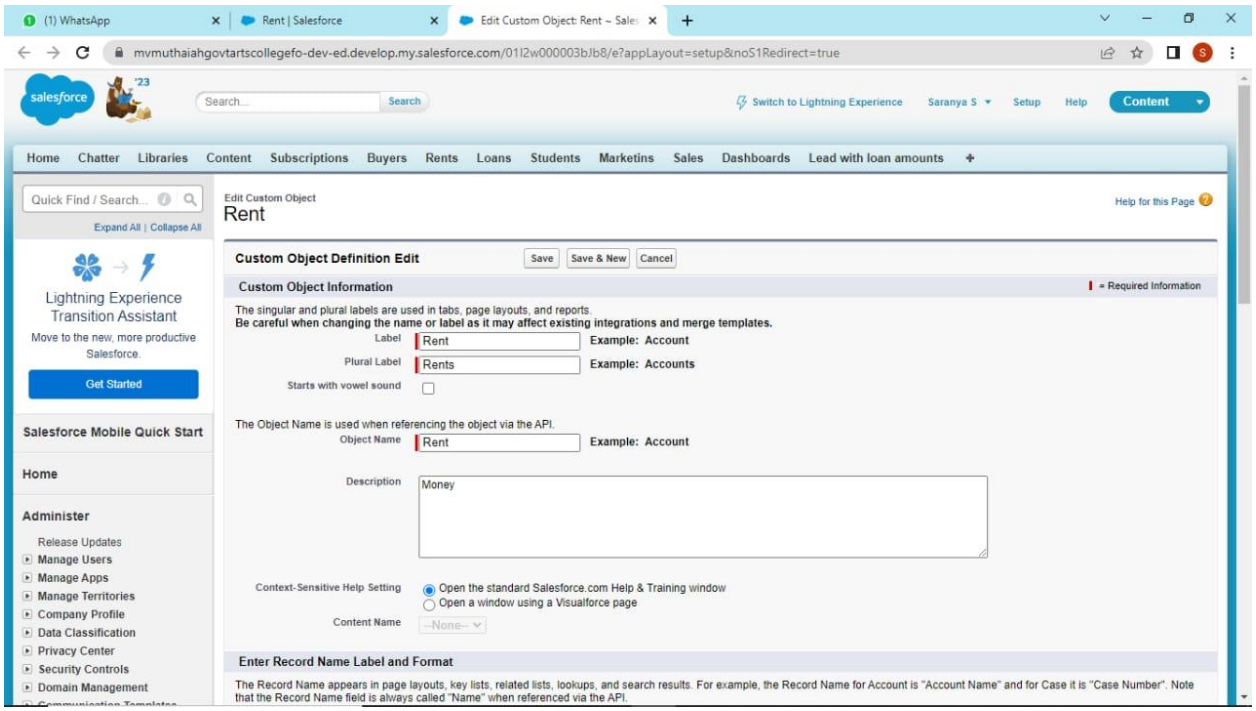
12. Allow search → Save

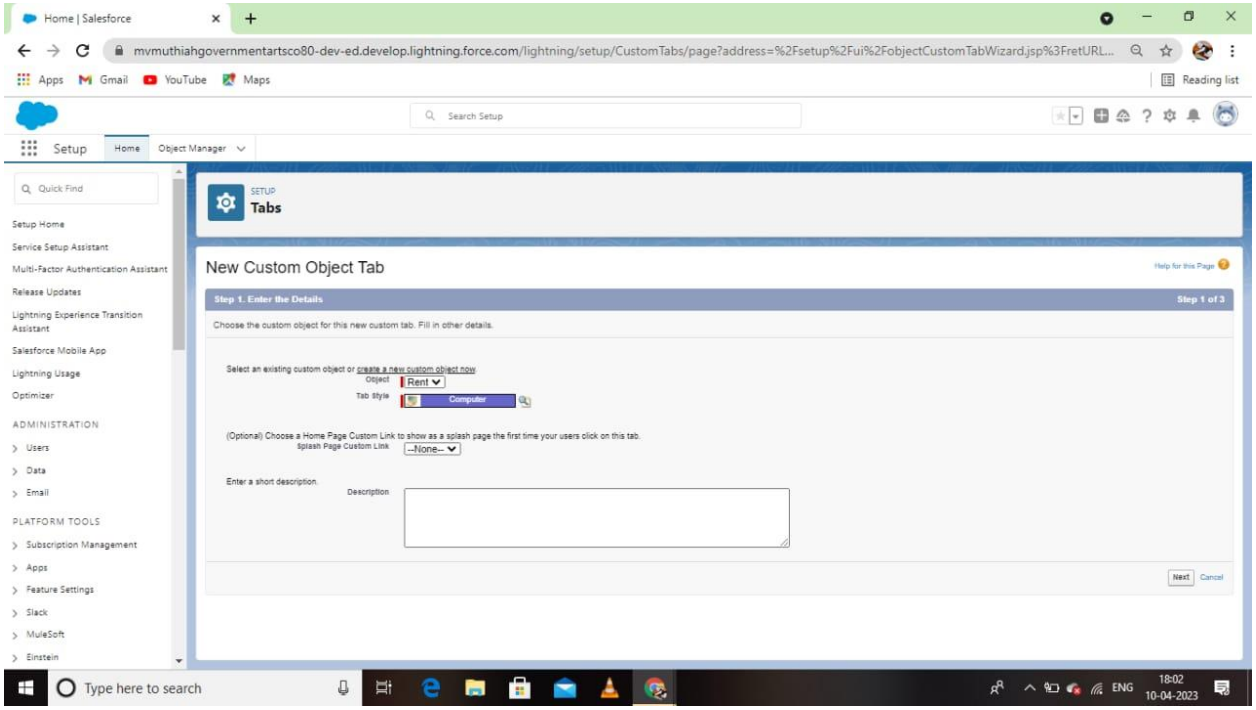

(1) WhatsApp
Buy | Salesforce
Edit Custom Object: Buy ~ Salesf
mvmuthaiahgovtartscollegefo-dev-ed.develop.my.salesforce.com/01I2w000003bHck/e?appLayout=setup&noS1Redirect=true
Search...
Search
Switch to Lightning Experience
Saranya S
Setup
Help
Content
Home
Chatter
Libraries
Content
Subscriptions
Buyers
Rents
Loans
Students
Marketins
Sales
Dashboards
Lead with loan amounts
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Edit Custom Object
Buy
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Buy
Example: Account
Plural Label
Buyers
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Buy
Example: Account
Description
Money
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
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
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Buy
Tab style
Car
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel
Type here to search
ENG
17:51
10-04-2023

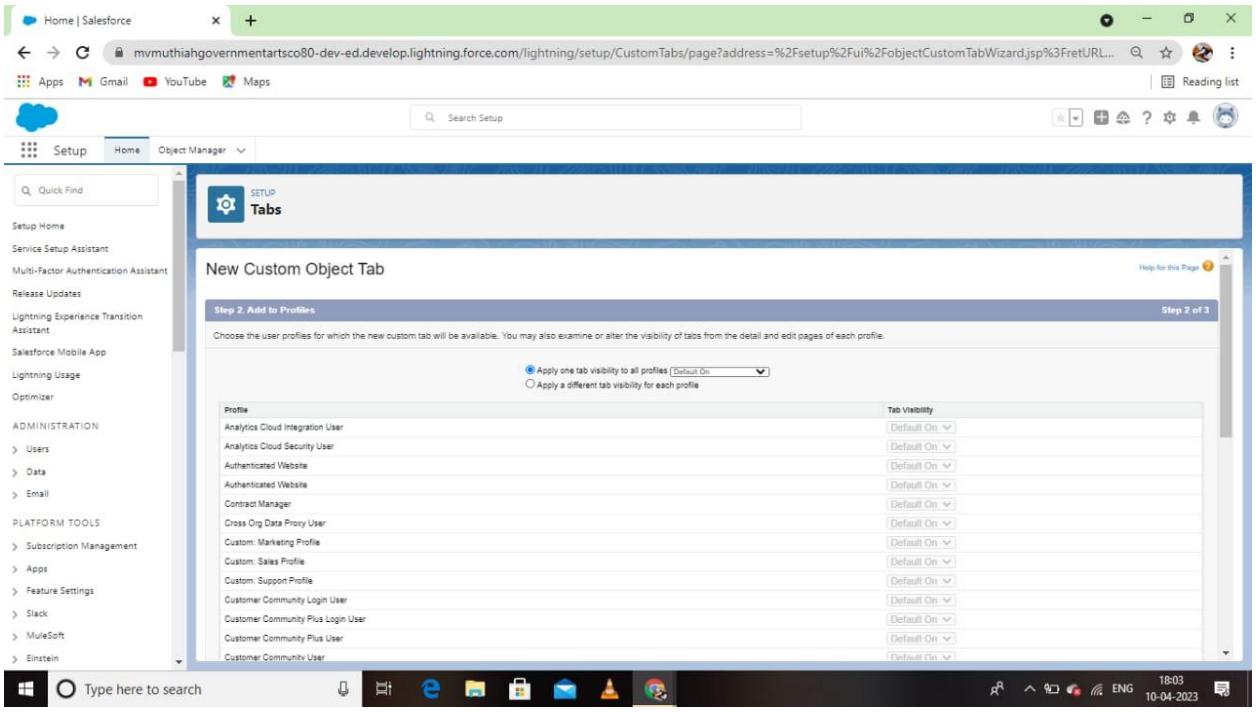

Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor 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
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.
Apply one tab visibility to all profiles
Default On
Apply a different tab visibility for each profile
Profile
Tab Visibility
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Type here to search
ENG
18:03
10-04-2023

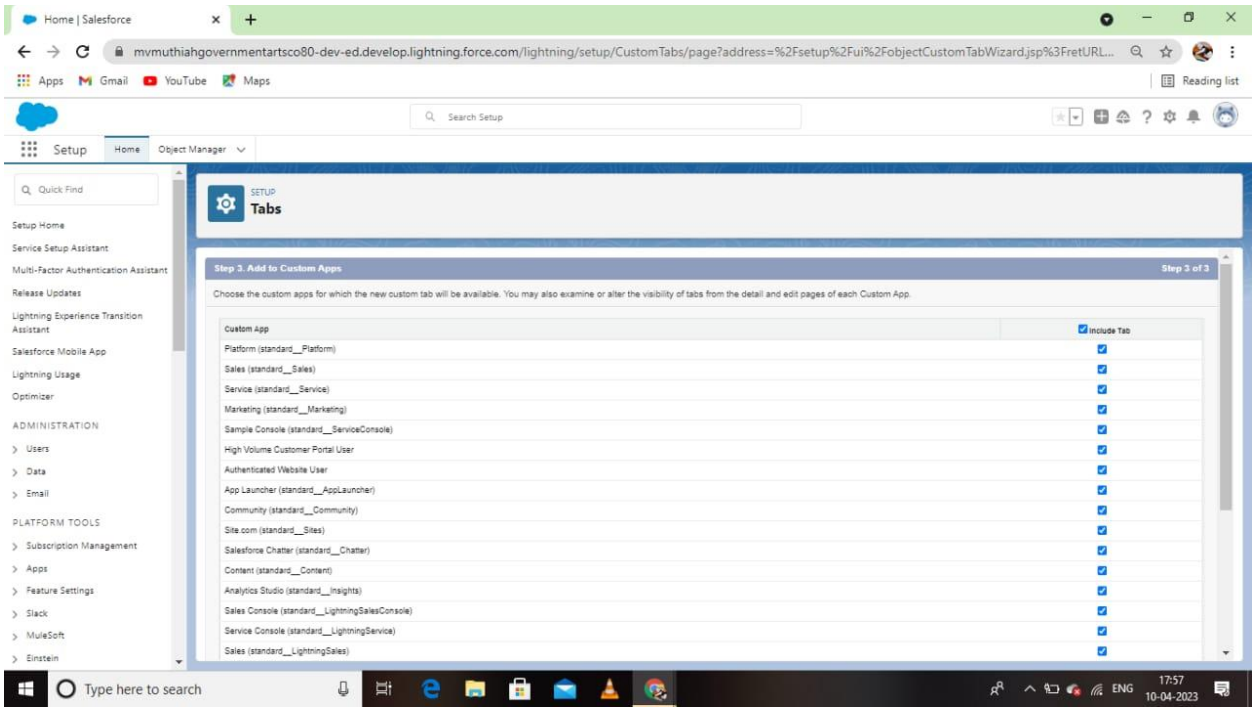

Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor 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
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Type here to search
ENG
17:52
10-04-2023

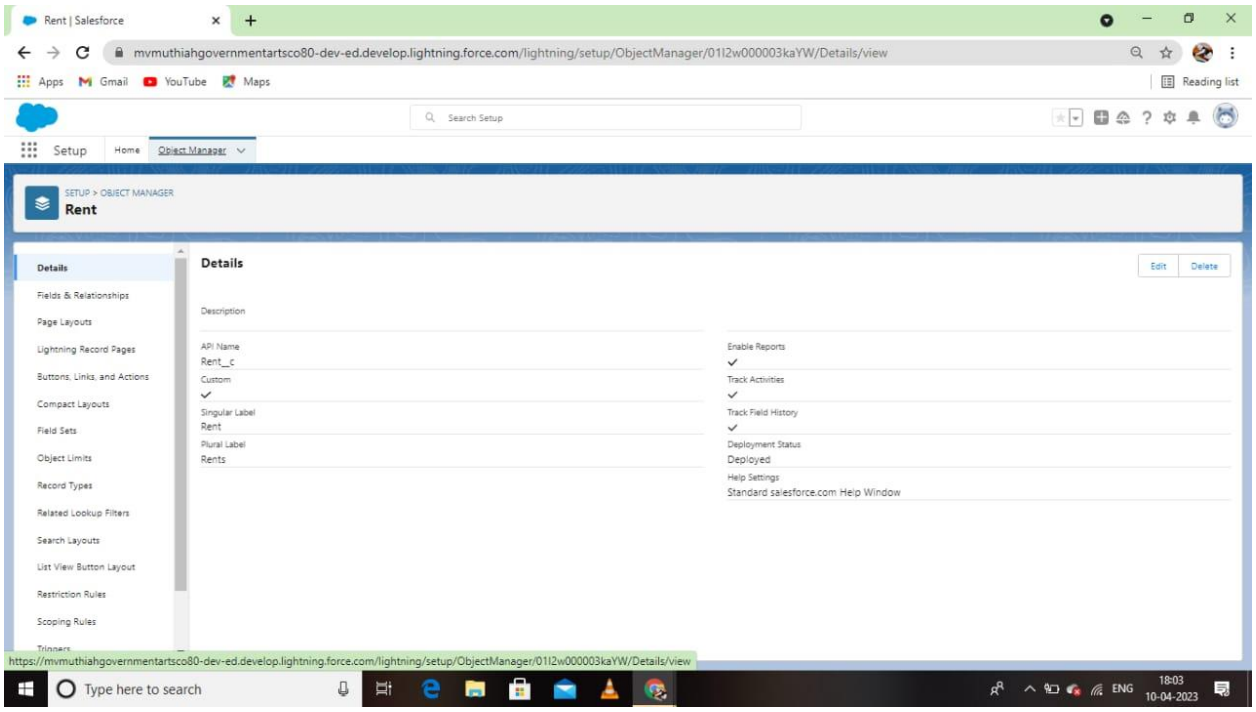

Buy | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kaX9/Details/view
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Buy
Details
Fields & Relationships
Page Layouts
Lightning Record 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
Edit
Delete
Description
API Name
Buy__c
Custom
Singular Label
Buy
Plural Label
Buys
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
https://mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kaX9/Details/view
Type here to search
ENG
17:52
10-04-2023

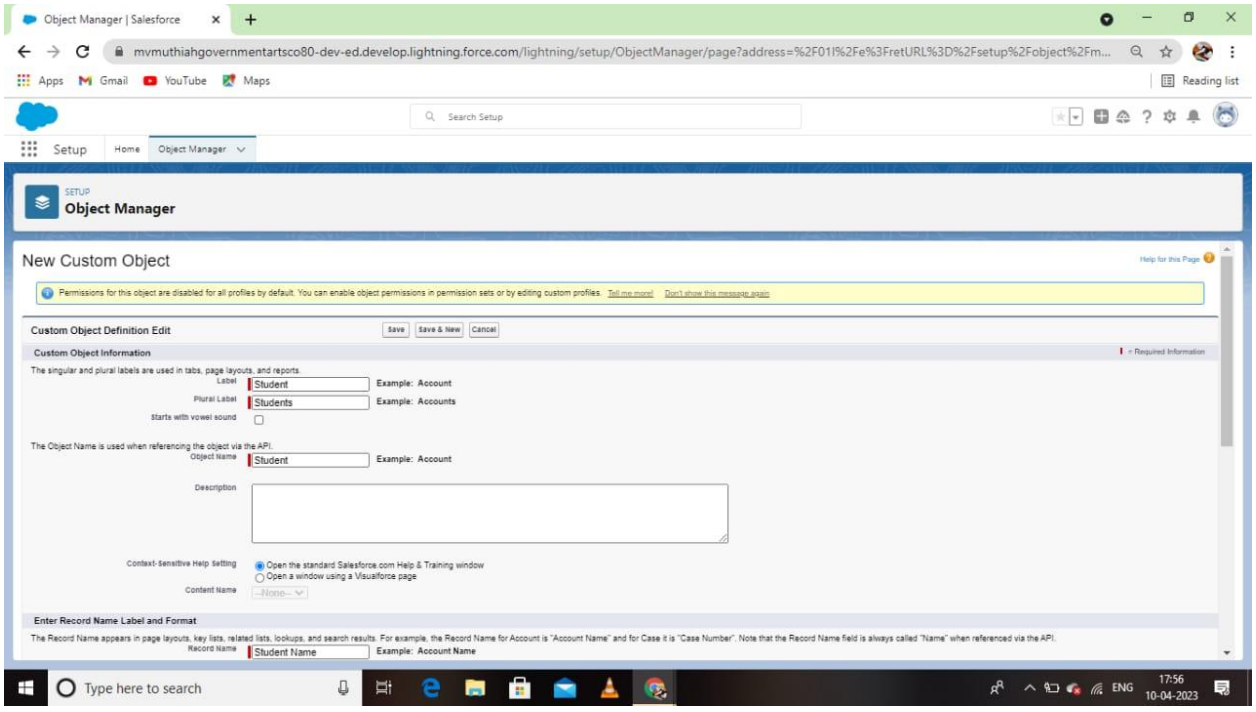

(1) WhatsApp
Rent | Salesforce
Edit Custom Object: Rent ~ Sales
mvmuthaiahgovtartscollegefo-dev-ed.develop.my.salesforce.com/01I2w000003bJb8/e?appLayout=setup&noS1Redirect=true
Search...
Search
Switch to Lightning Experience
Saranya S
Setup
Help
Content
Home
Chatter
Libraries
Content
Subscriptions
Buyers
Rents
Loans
Students
Marketins
Sales
Dashboards
Lead with loan amounts
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Edit Custom Object
Rent
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Rent
Example: Account
Plural Label
Rents
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Rent
Example: Account
Description
Money
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

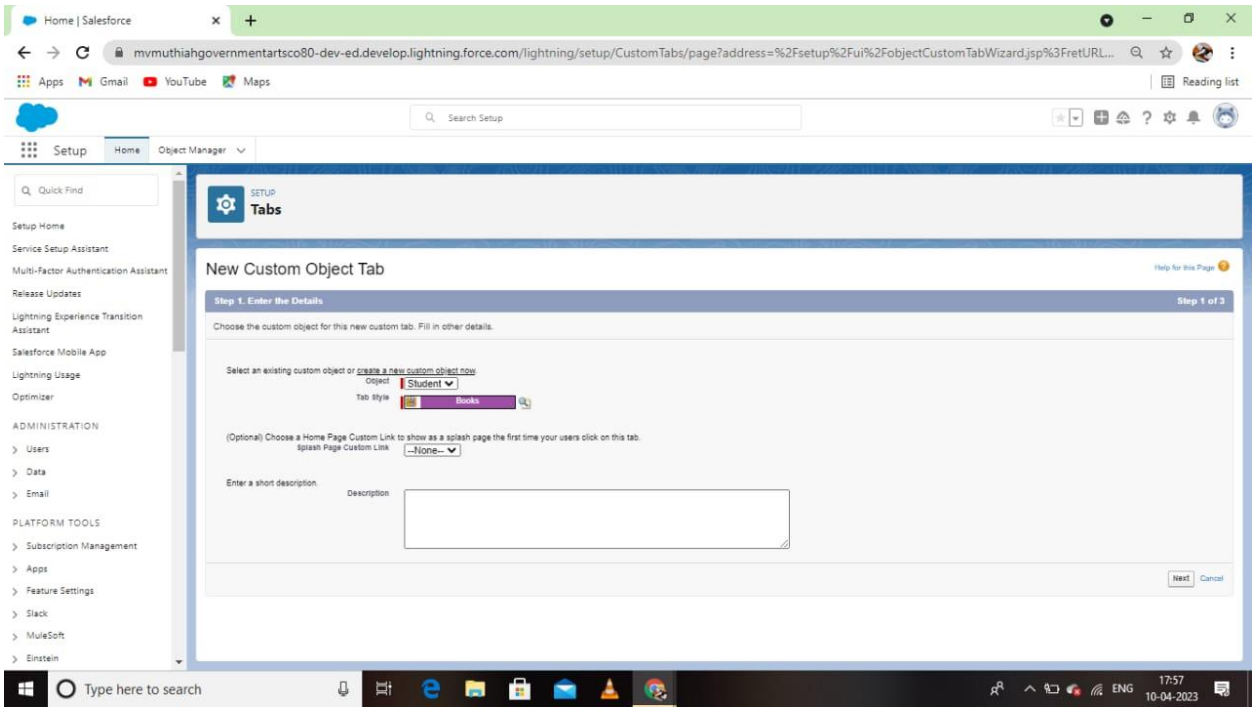

Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor 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
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now
Object
Rent
Tab Style
Computer
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel
Type here to search
ENG
18:02
10-04-2023

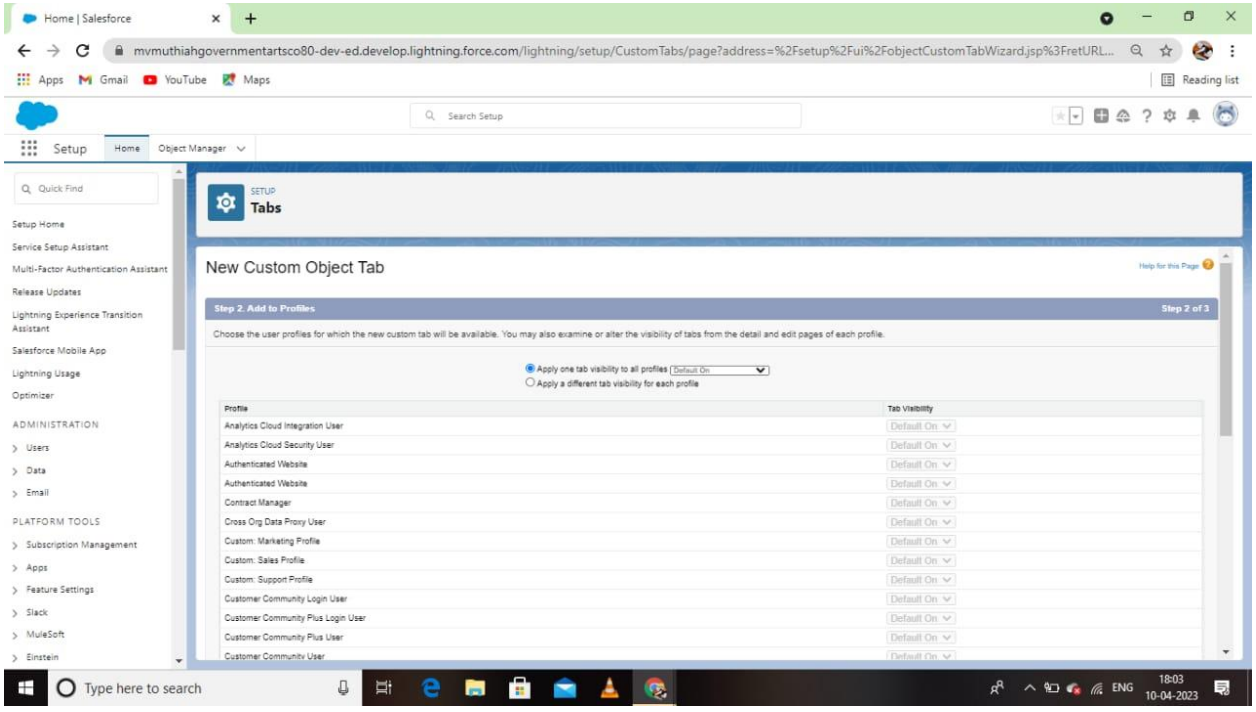

Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor 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
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.
Apply one tab visibility to all profiles
Default On
Apply a different tab visibility for each profile
Profile
Tab Visibility
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Type here to search
ENG
18:03
10-04-2023

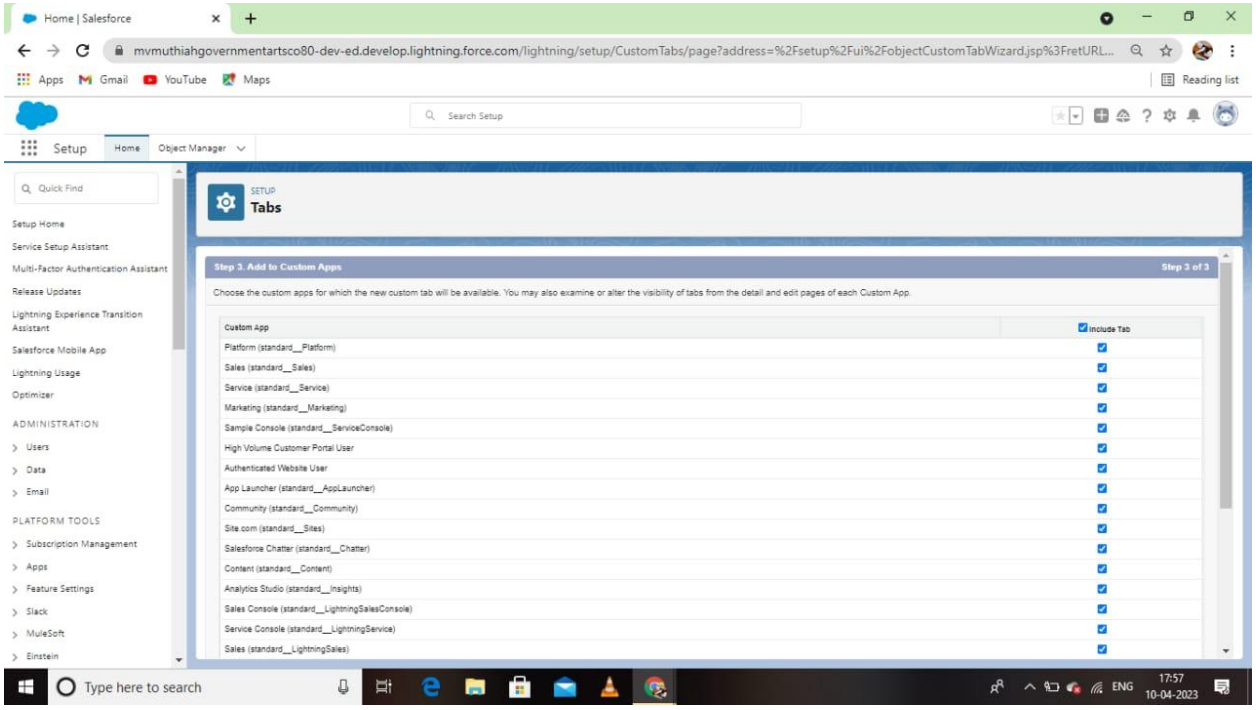

Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor 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
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Type here to search
ENG
17:57
10-04-2023

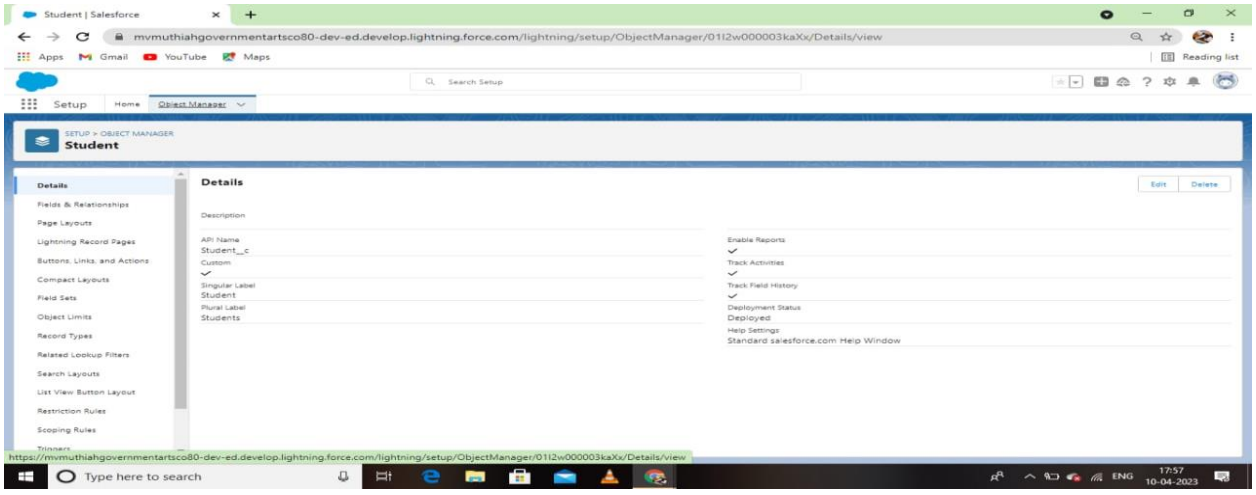

Rent | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kaYW/Details/view
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Rent
Details
Fields & Relationships
Page Layouts
Lightning Record 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
Edit
Delete
Description
API Name
Rent__c
Custom
Singular Label
Rent
Plural Label
Rents
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
https://mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kaYW/Details/view
Type here to search
ENG
18:03
10-04-2023

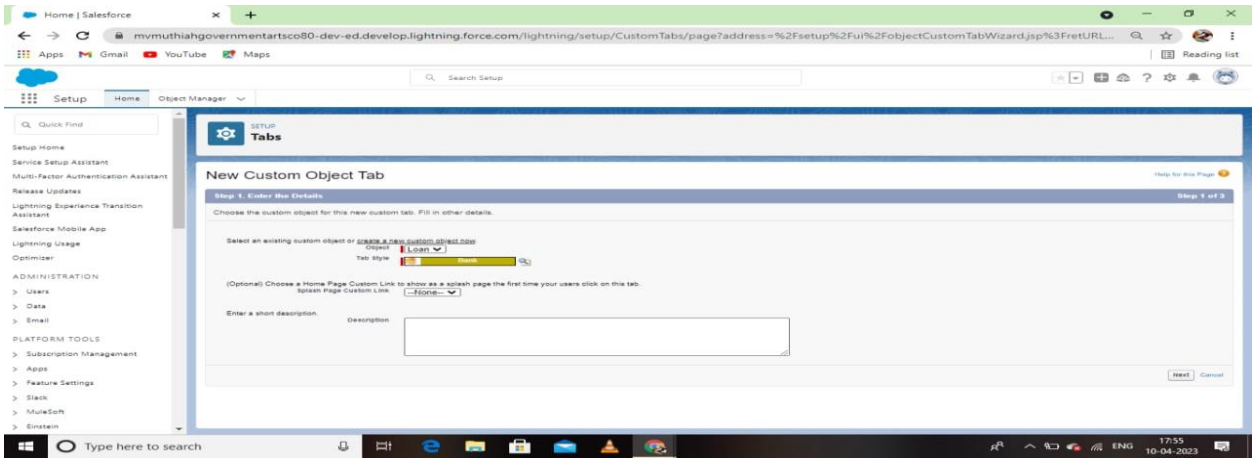

Object Manager | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01I%2Fe%3FretURL%3D%2Fsetup%2Fobject%2Fm...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Student
Example: Account
Plural Label
Students
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Student
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Student Name
Example: Account Name
Type here to search
ENG
17:56
10-04-2023

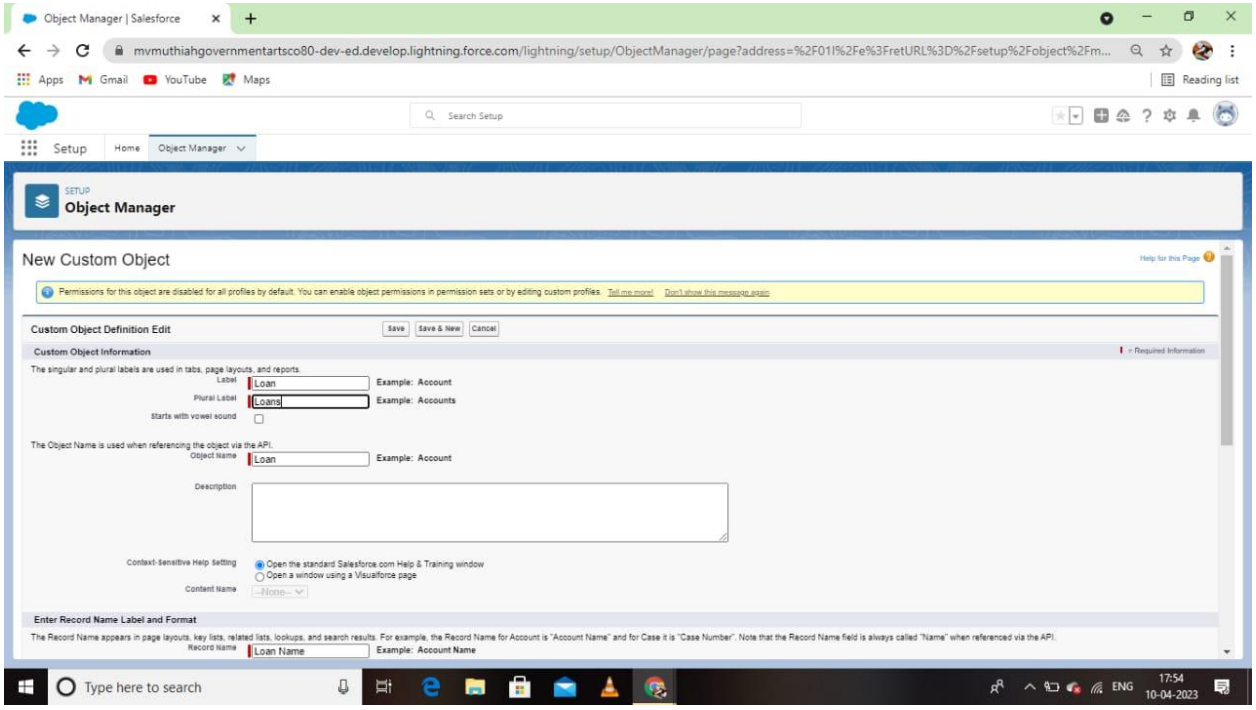

Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor 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
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Student
Tab Style
Books
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel
Type here to search
ENG
17:57
10-04-2023

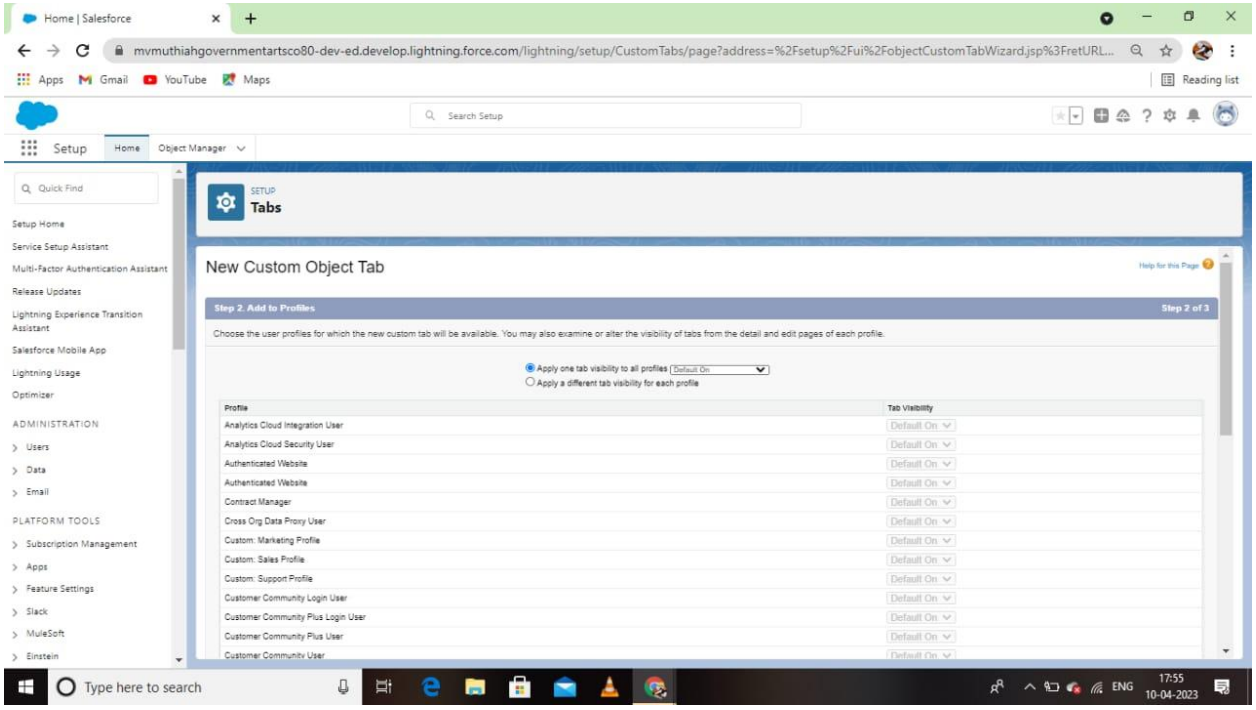

Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor 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
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.
Apply one tab visibility to all profiles
Default On
Apply a different tab visibility for each profile
Profile
Tab Visibility
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Type here to search
ENG
18:03
10-04-2023

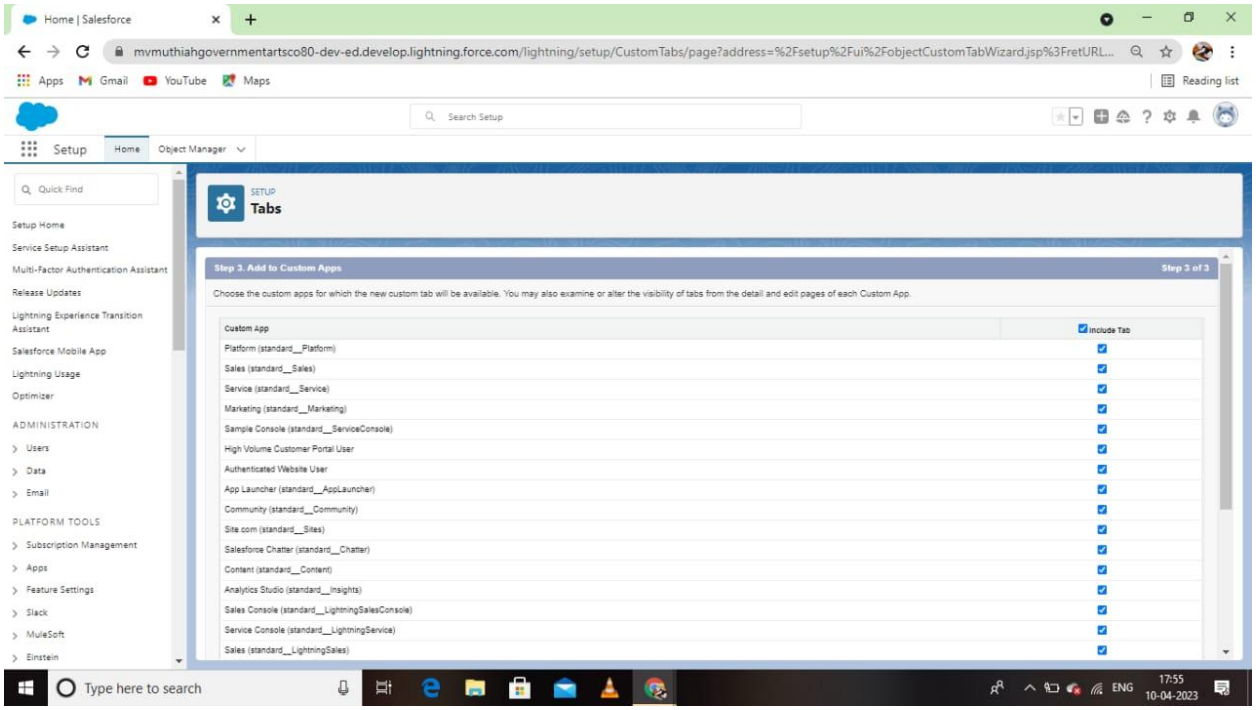

Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor 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
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Type here to search
ENG
17:57
10-04-2023

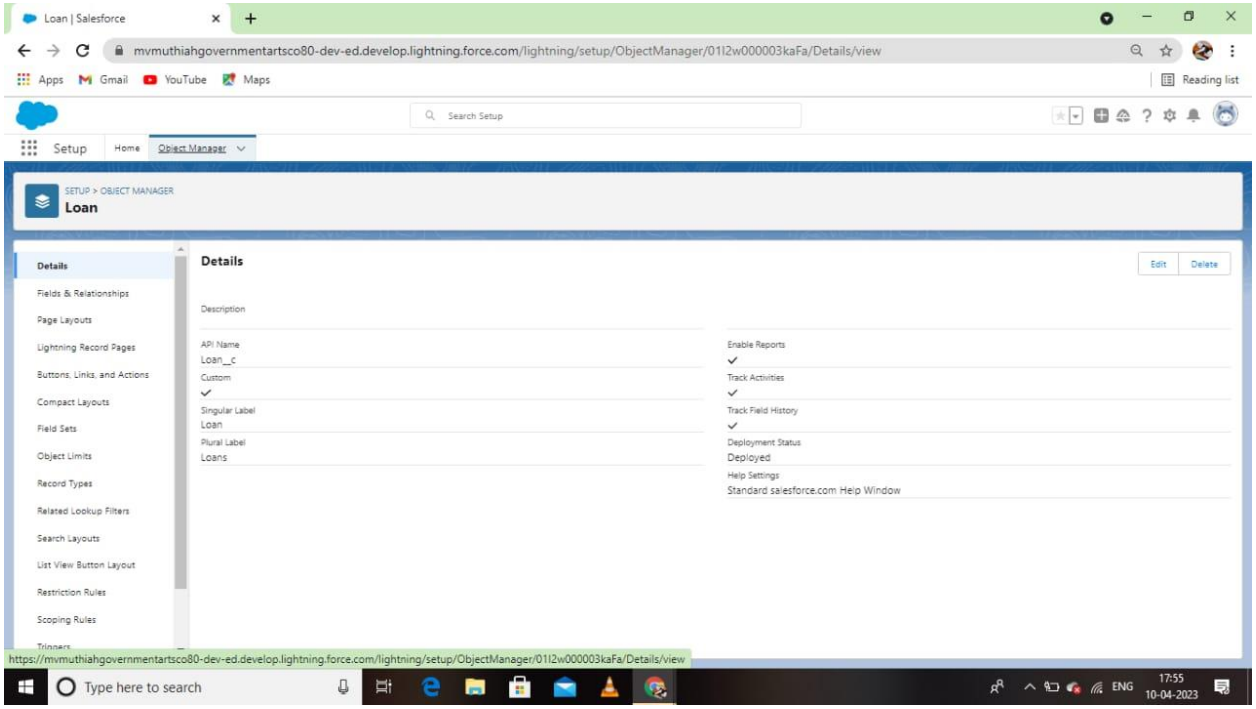

Student | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kaXx/Details/view
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Student
Details
Fields & Relationships
Page Layouts
Lightning 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
Edit
Delete
Description
API Name
Student__c
Custom
Singular Label
Student
Plural Label
Students
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
https://mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kaXx/Details/view
Type here to search
ENG
17:57
10-04-2023


Home | Salesforce
Setup
Home
Object Manager
SETUP
Tabs
New Custom Object Tab
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now
Object
Loan
Tab Style
Bank
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel
Type here to search
ENG
17:55
10-04-2023


Object Manager | Salesforce
Setup
Home
Object Manager
SETUP
Object Manager
New Custom Object
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Loan
Example: Account
Plural Label
Loans
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Loan
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Loan Name
Example: Account Name
Type here to search
ENG
17:54
10-04-2023


Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
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
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.
Apply one tab visibility to all profiles
Default On
Apply a different tab visibility for each profile
Profile
Tab Visibility
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Type here to search
ENG
17:55
10-04-2023


Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
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
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Type here to search
ENG
17:55
10-04-2023



Mile Stone 3:Tab

Create the Lightning

Tab To create a Tab: (Lead)

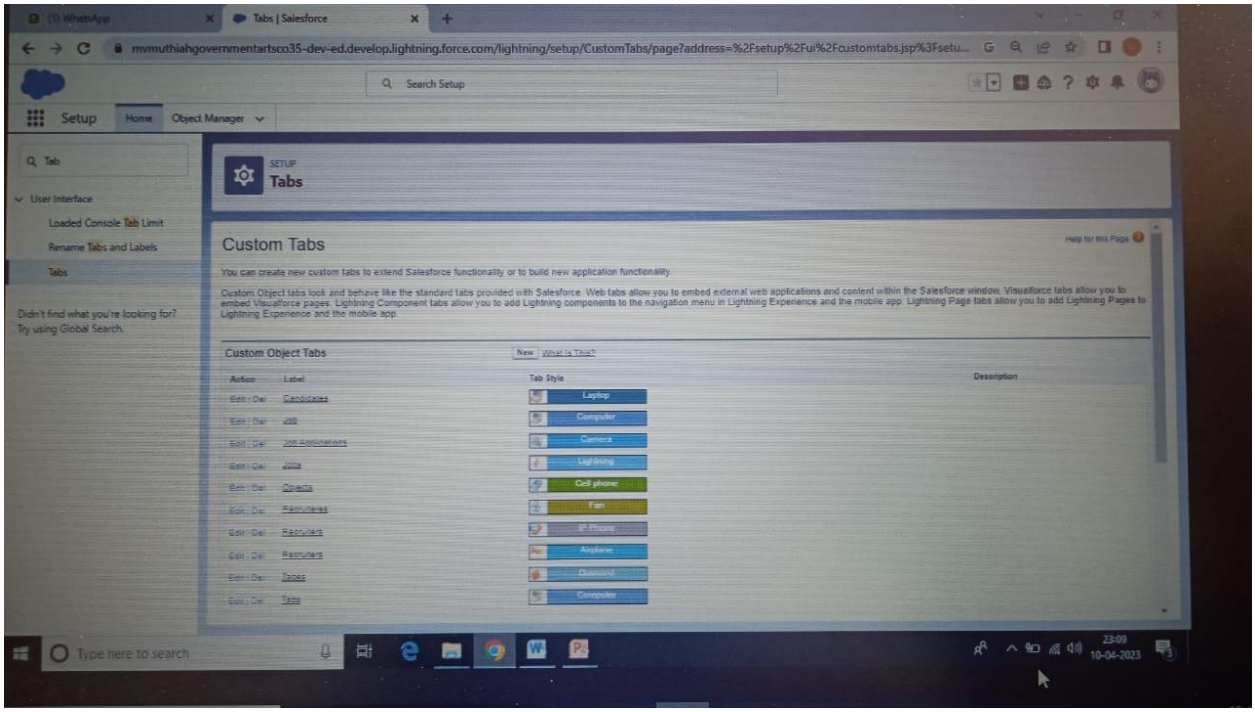
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object (Lead) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default
3. Select Object(Lead) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save→ Save
4. 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

    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



Mile Stone:4 Lightining App

Create the Lightning App

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

2. Fill the app name as an Property Management in app details and branding →Next → (App option page) keep it as default → Next

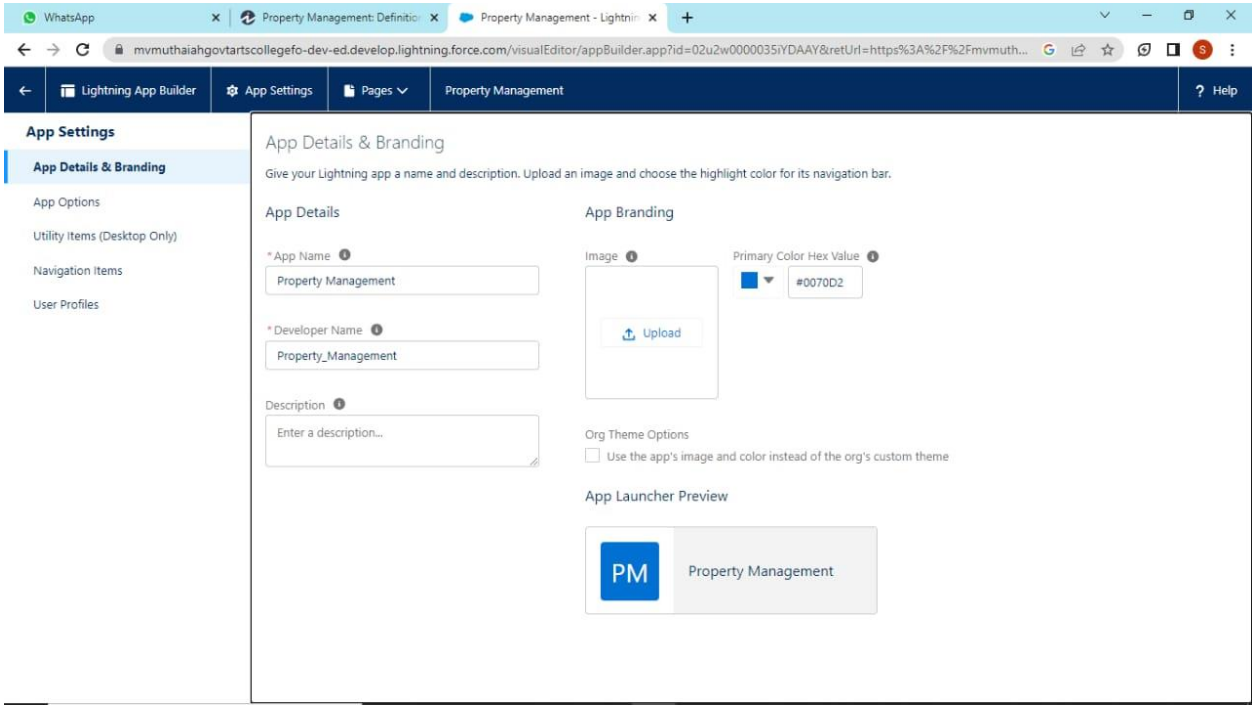
3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform user, Standard User → Next

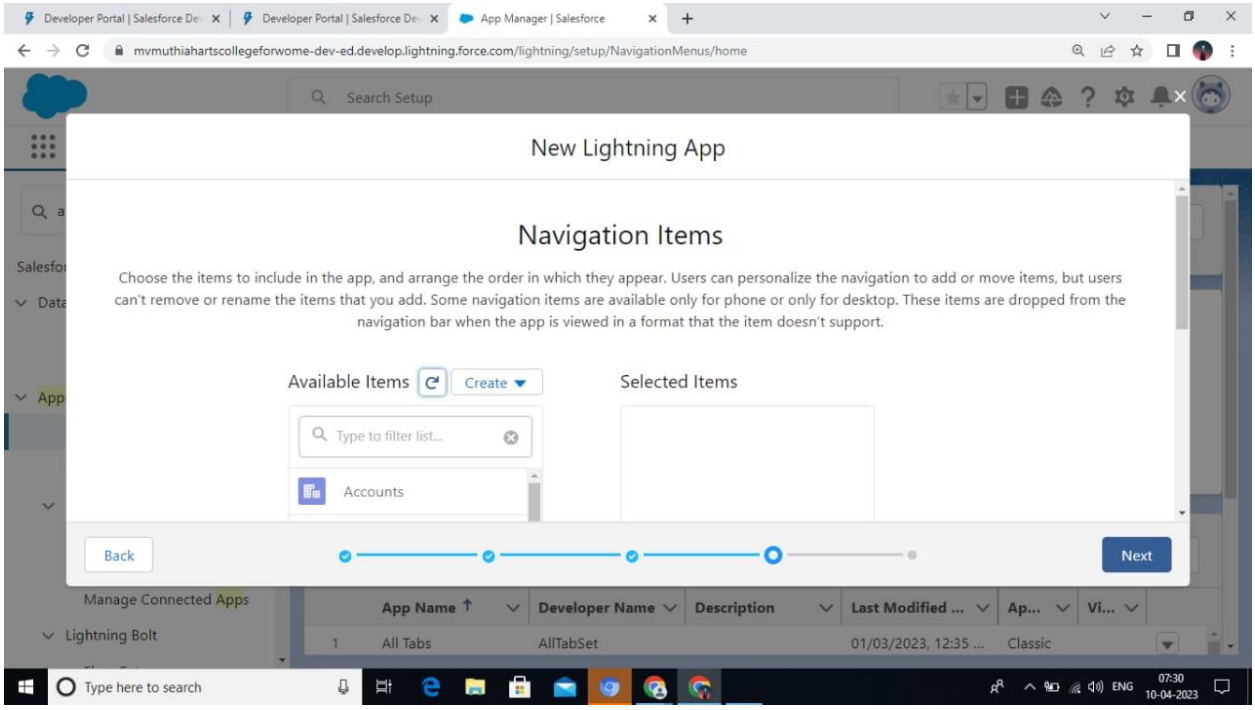
4. To Add Navigation Items:

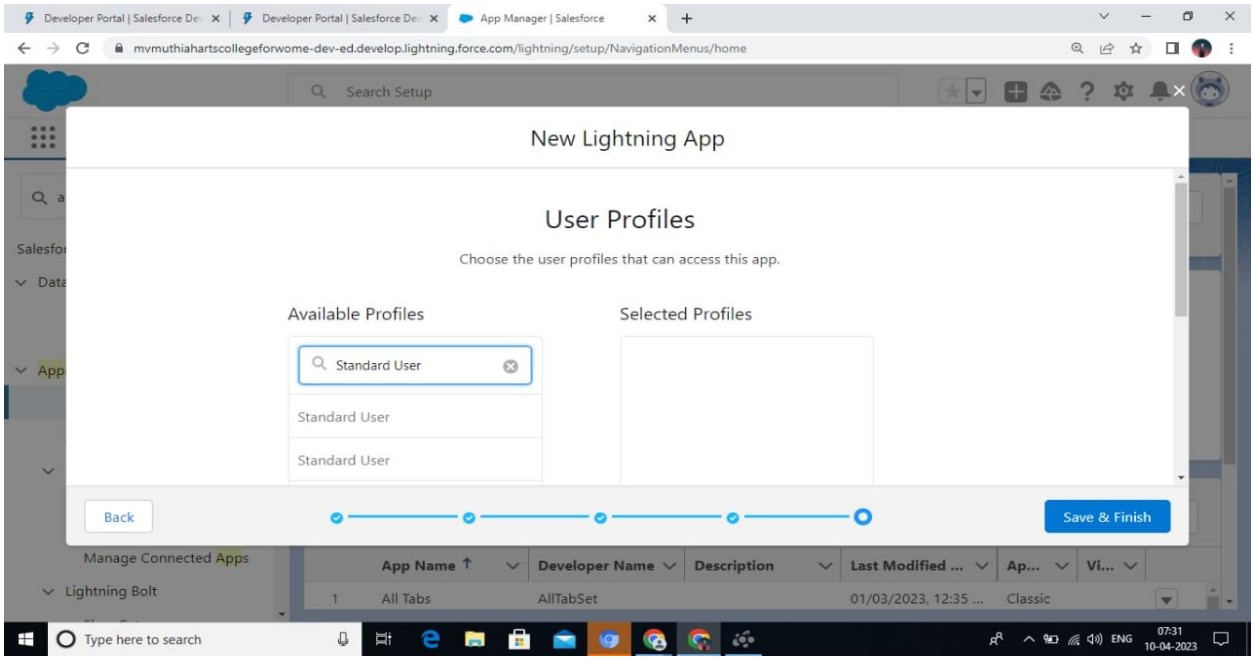
   Select the items from the search bar and move it using the arrow button → Next

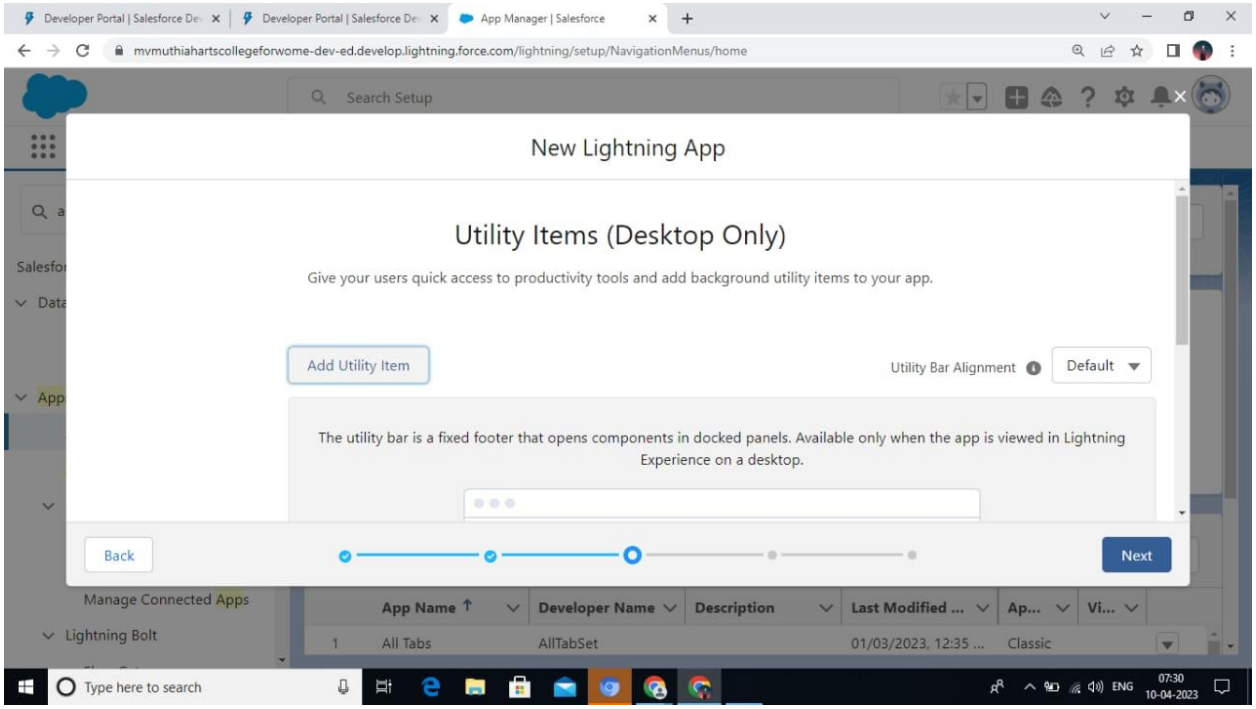
5. To Add User Profiles:

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




Developer Portal | Salesforce De
Developer Portal | Salesforce De
App Manager | Salesforce
mvmuthiahartscollegeforwome-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
New Lightning App
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Selected Items
Type to filter list...
Accounts
Back
Next
Manage Connected Apps
Lightning Bolt
App Name
Developer Name
Description
Last Modified ...
Ap...
Vi...
1
All Tabs
AllTabSet
01/03/2023, 12:35 ...
Classic
Type here to search
ENG
07:30
10-04-2023


Developer Portal | Salesforce De
Developer Portal | Salesforce De
App Manager | Salesforce
mvmuthiahartscollegeforwome-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Selected Profiles
Standard User
Standard User
Standard User
Back
Save & Finish
Manage Connected Apps
Lightning Bolt
App Name
Developer Name
Description
Last Modified ...
Ap...
Vi...
1
All Tabs
AllTabSet
01/03/2023, 12:35 ...
Classic
Type here to search
ENG
07:31
10-04-2023



Mile Stone 5: Fields

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.
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)

   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

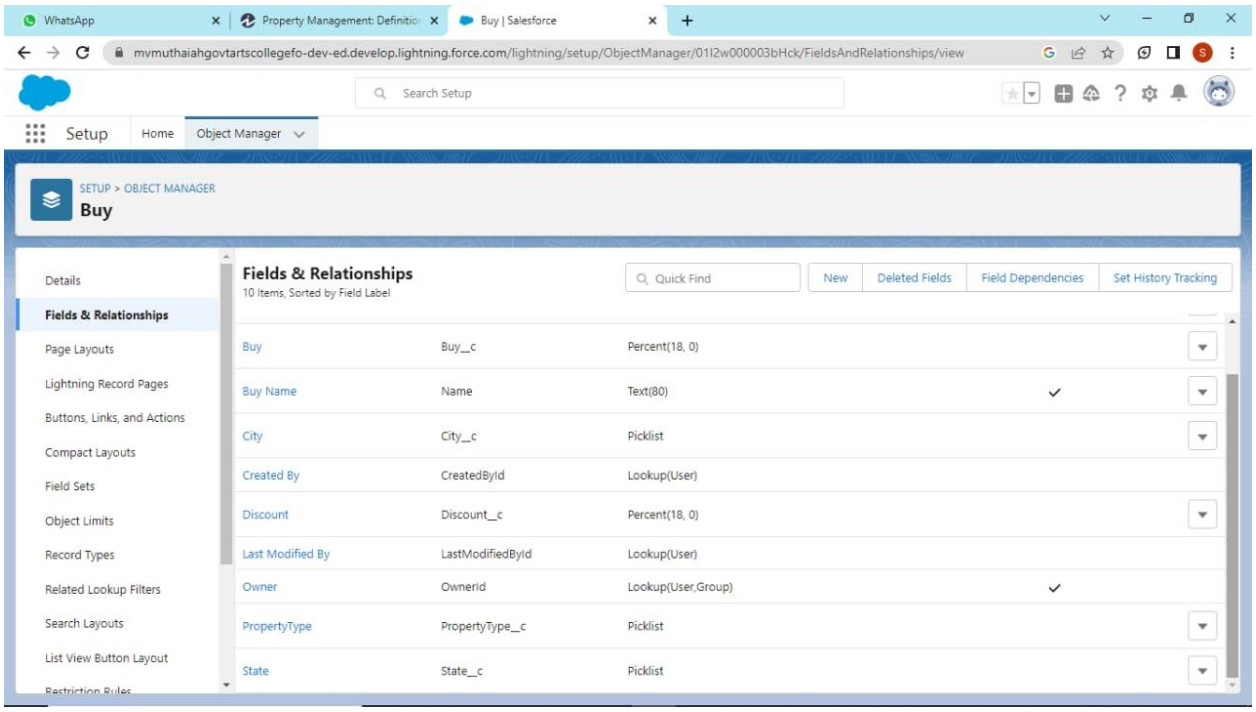
5. Total Loan Instalments :(Field create the Number as the field data type)

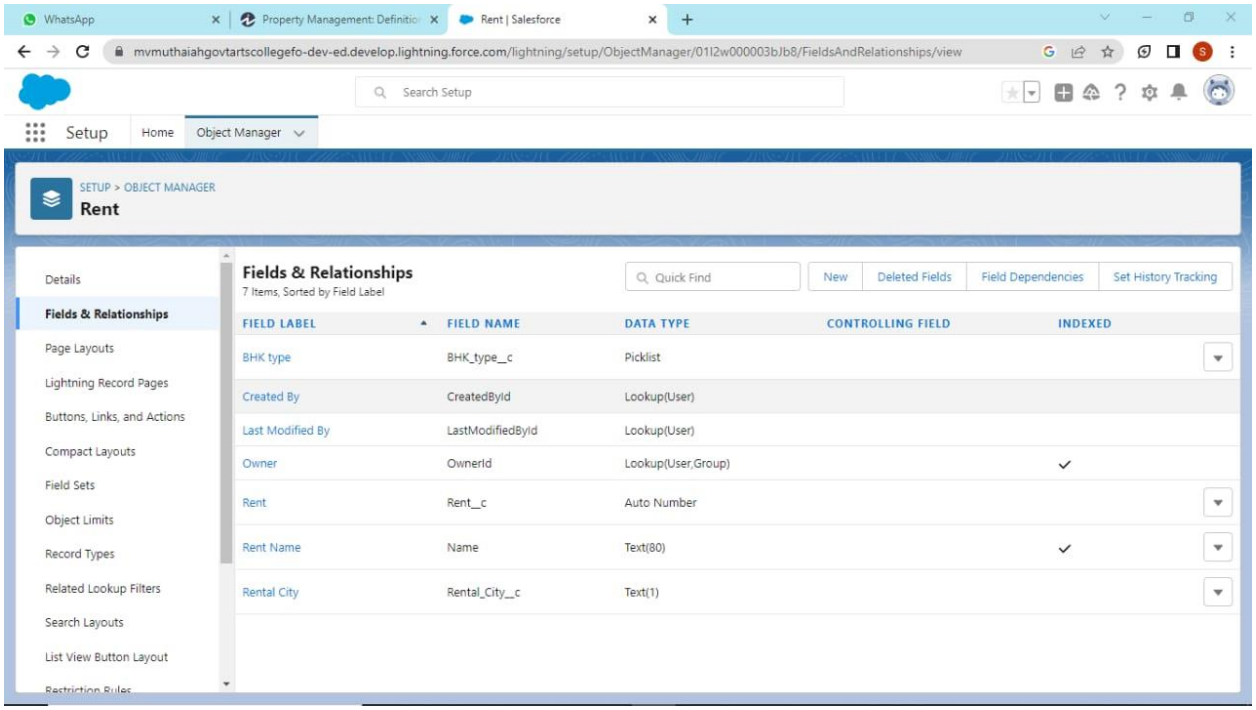
6. Loan Repayment (Field create the Number as the field data type)

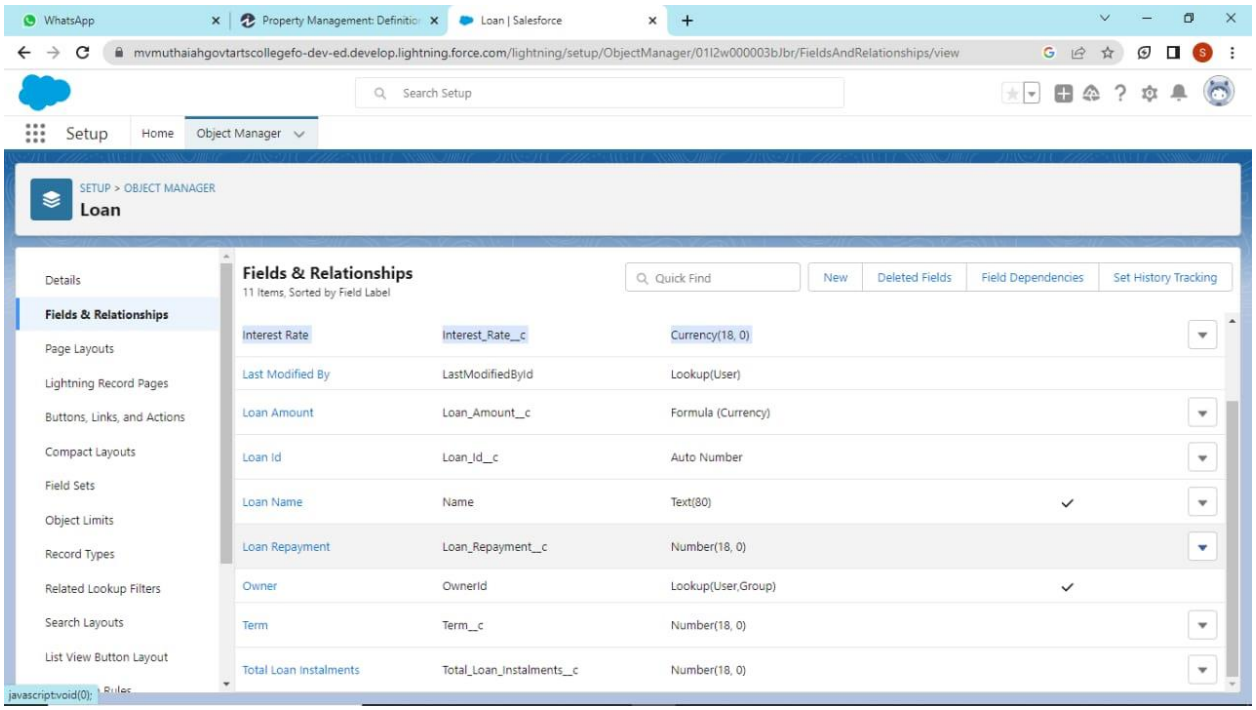
7. Loan Amount(Select the field data type as Formula)

8. For the Loan Object→ Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula (Loan_Repayment__c * (((1+(Interest_rate__c /52))^ Term__c) -1))/((Interest_rate__c /52)*((1+(Interest_rate__c /52))^ Term__c))

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


WhatsApp
Property Management: Definitio
Buy | Salesforce
mvmuthaiahgovtartscollegefo-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003bHck/FieldsAndRelationships/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
Fields & Relationships
10 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
Buy Buy__c Percent(18, 0)
Buy Name Name Text(80)
City City__c Picklist
Created By CreatedById Lookup(User)
Discount Discount__c Percent(18, 0)
Last Modified By LastModifiedById Lookup(User)
Owner OwnerId Lookup(User,Group)
PropertyType PropertyType__c Picklist
State State__c Picklist


WhatsApp
Property Management: Definitio
Rent | Salesforce
mvmuthaiahgovtartscollegefo-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003bJb8/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Rent
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
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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)
Rental City Rental_City__c Text(1)



Mile Stone 6: Profile

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

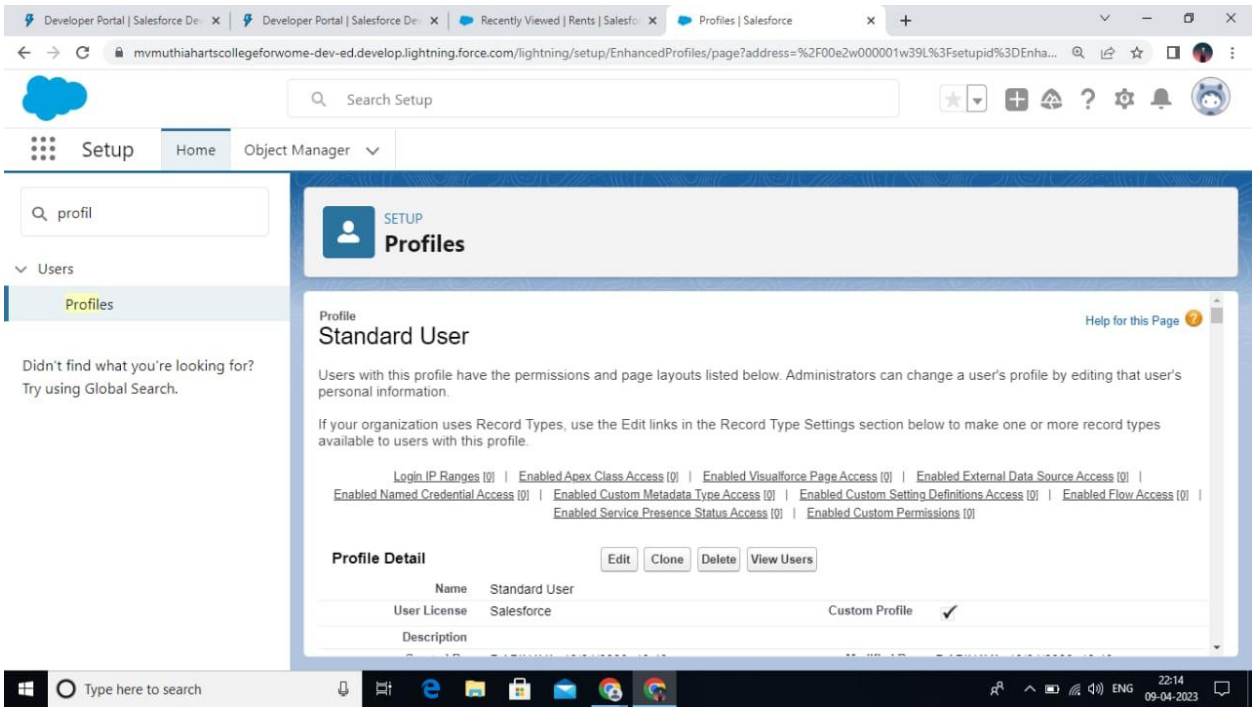
2. .Enter a Profile Name

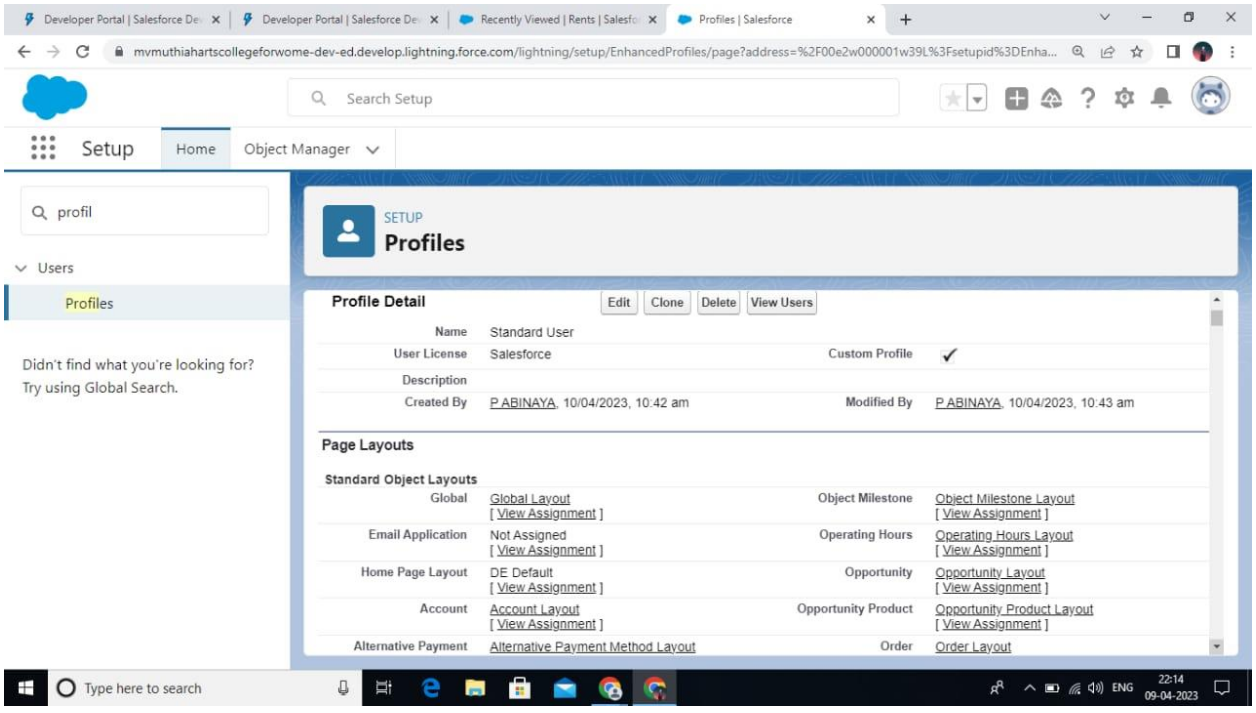
3. Click on the new created profile

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

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

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



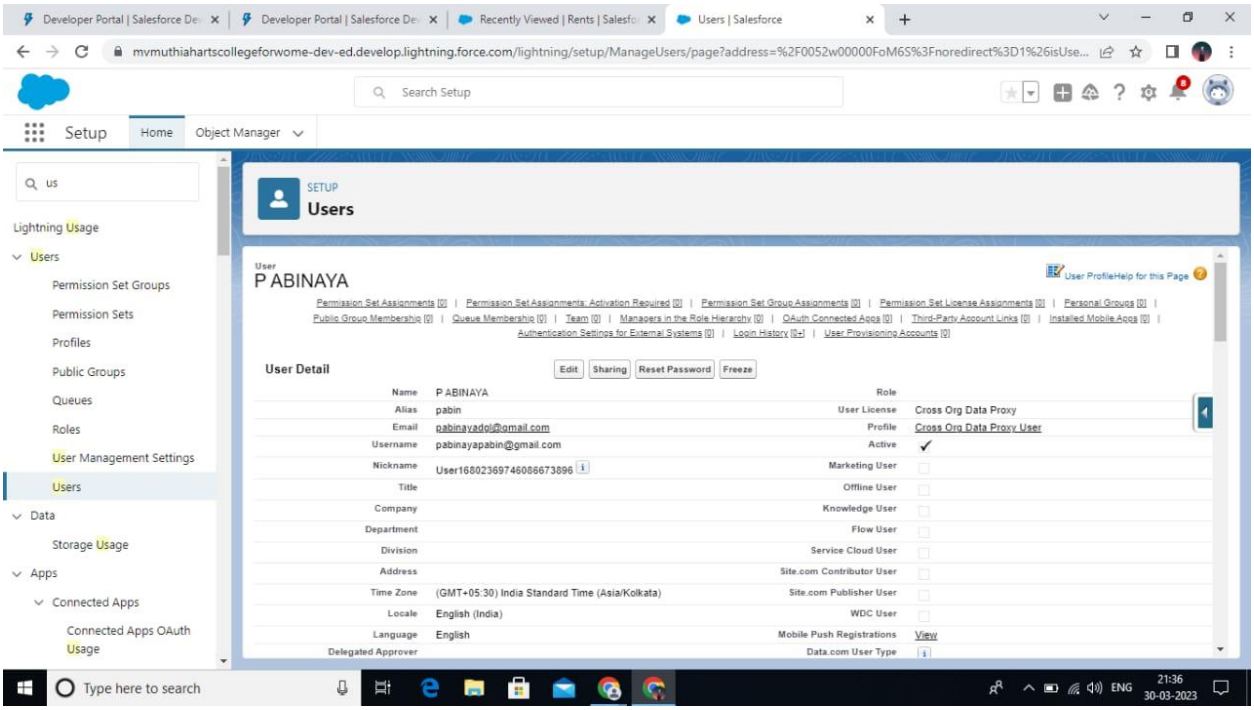


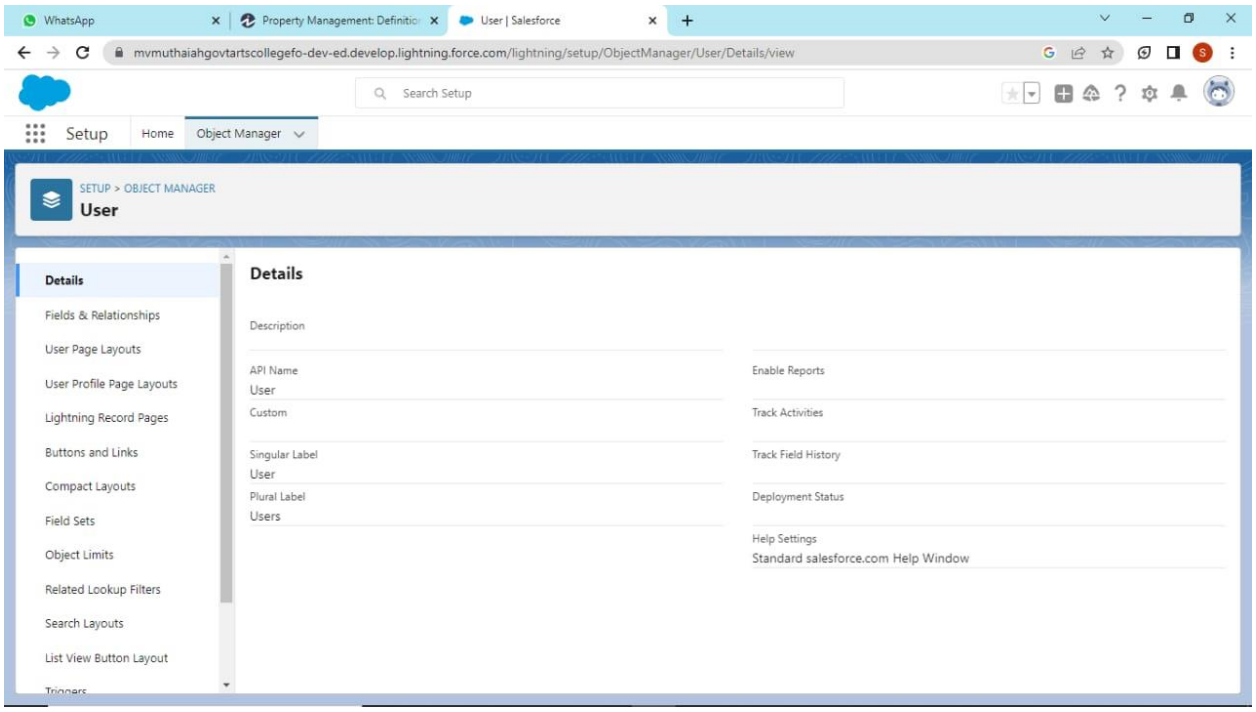
Mile Stone 7: User

Create User

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

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

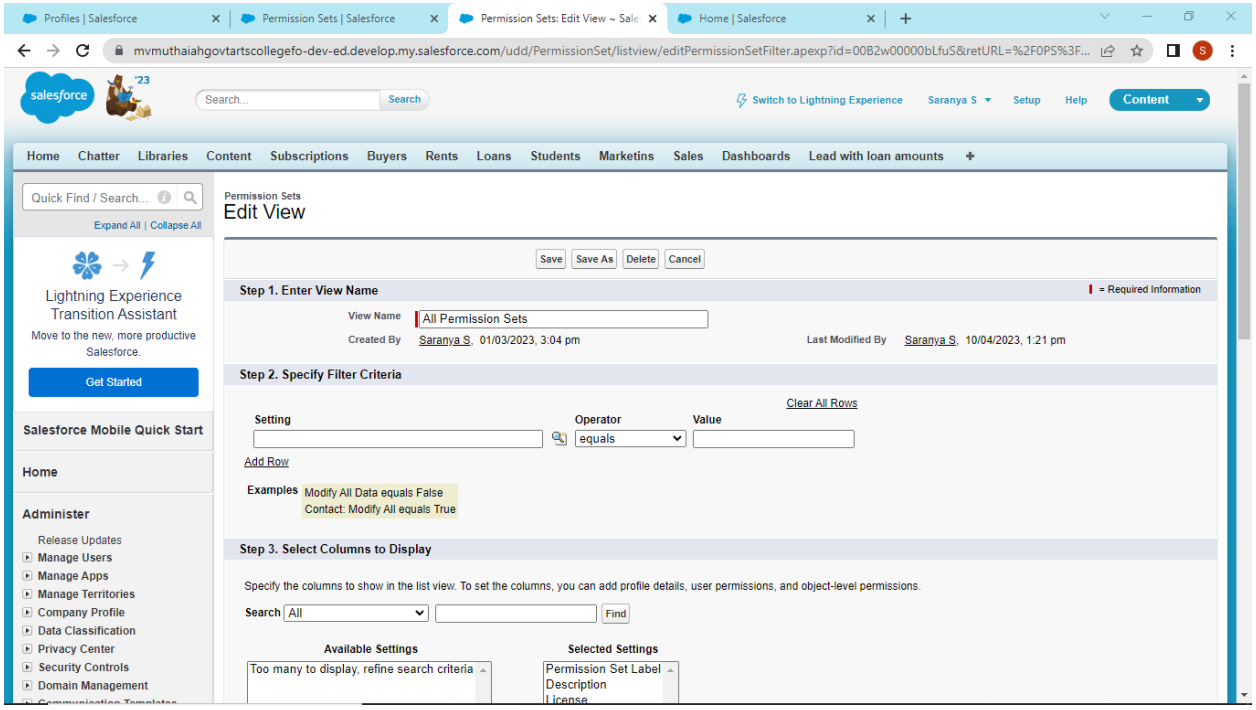




Mile Stone 8:Permission Set

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
5. Now select the users and click on save.
6. Go to permission set and add the access For Sales Rep3 give Access with Create permission for the user



Mile Stone 9: Setup for OWD

Create OWD Setting

1. Setup, use the Quick Find box to find Sharing Settings.

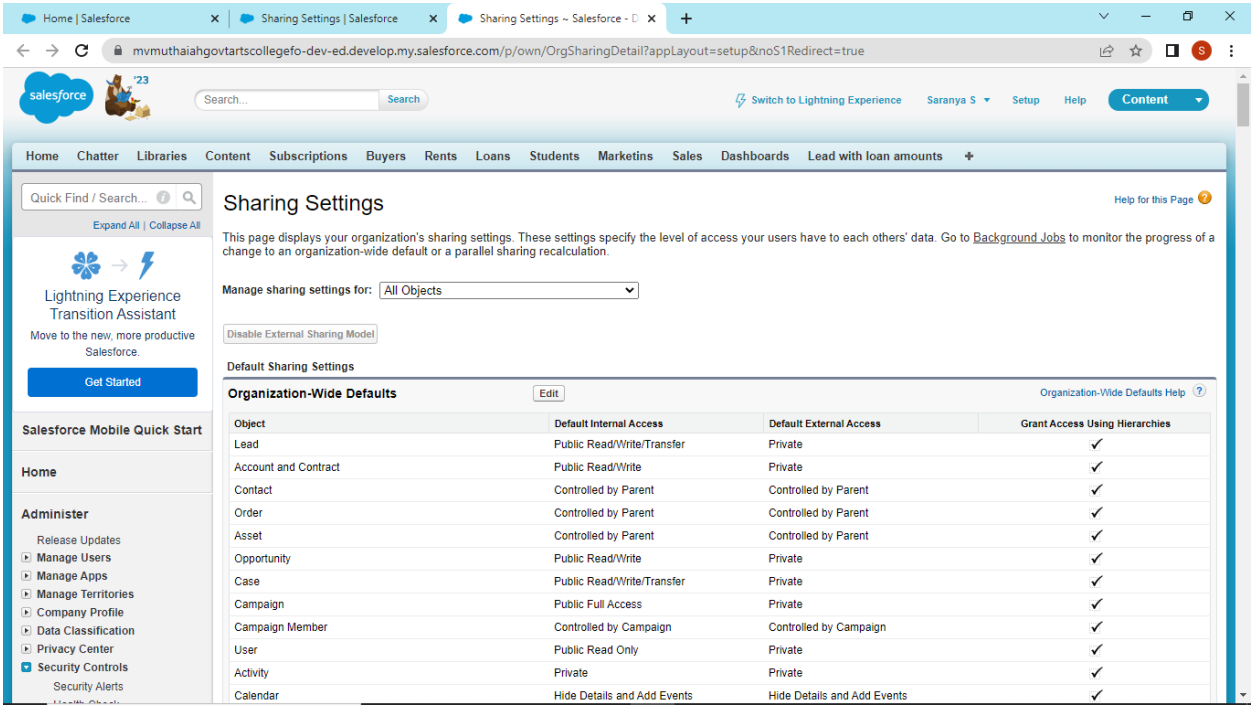
2. Click Edit in the Organization-Wide Defaults area.

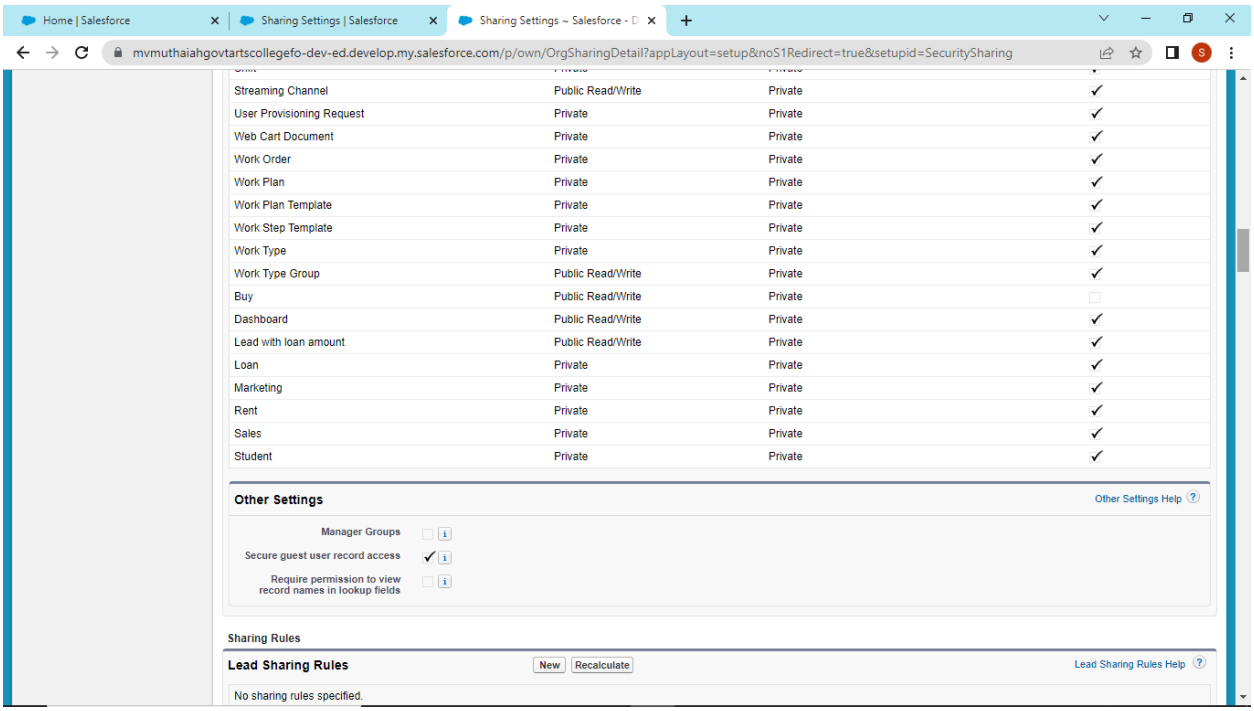
3. For each object, select the default access you want to give everyone.

4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Lead, Rent custom object.

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

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

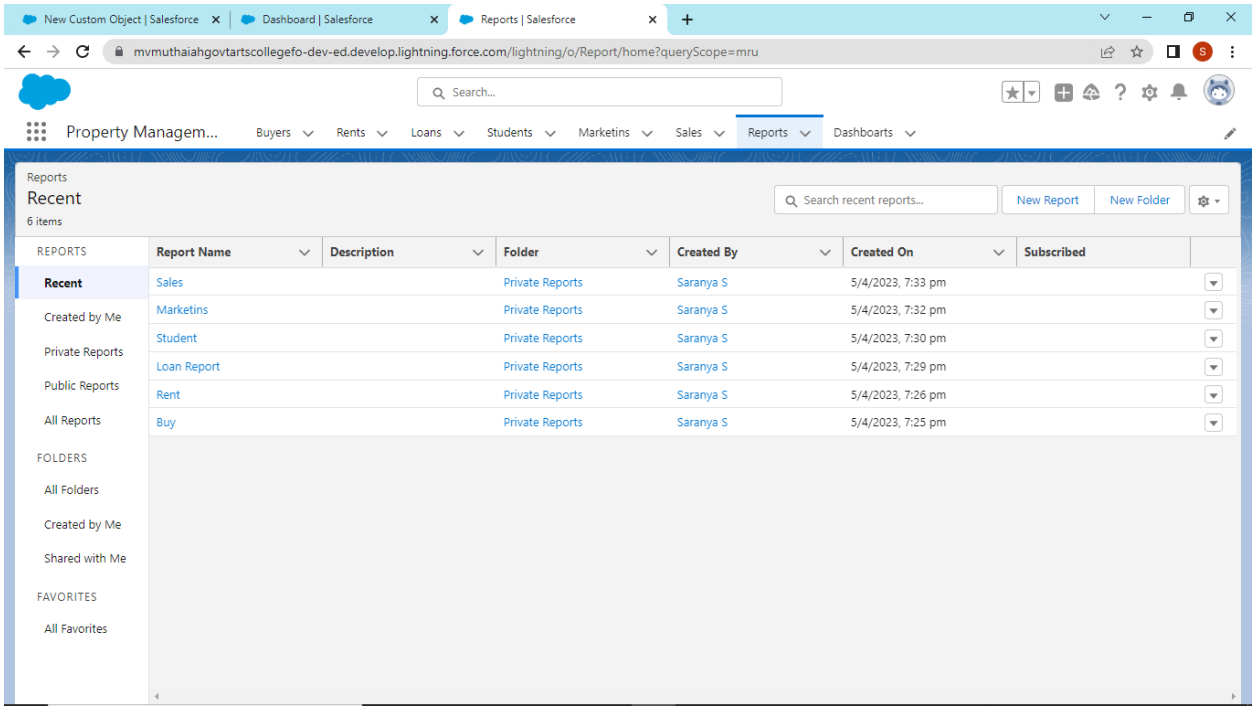




Mile Stone10:Report:

Create Report

1. Go to the app → click on the reports tab
2. Click New Report
3. Select report type from category or from report type panel or from search panel → click on start report.
4. Customize your report, then save or run it.



Mile Stone 11:Dashboard

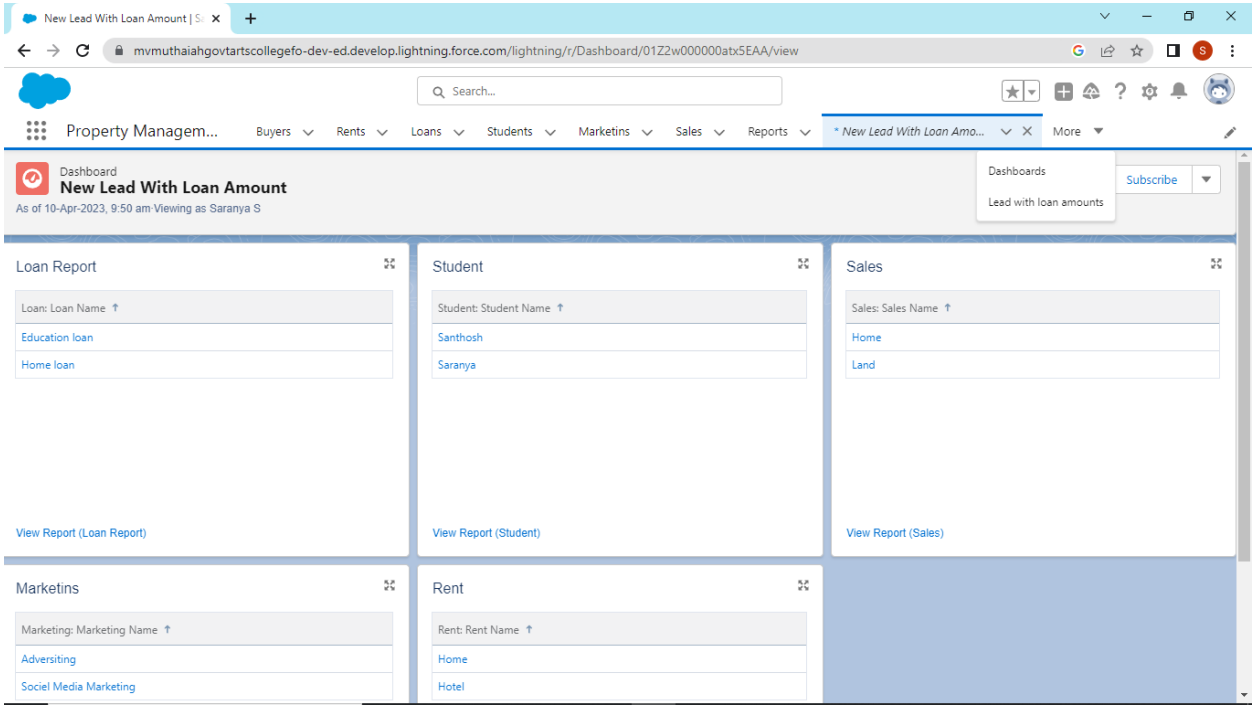
Create dashboards

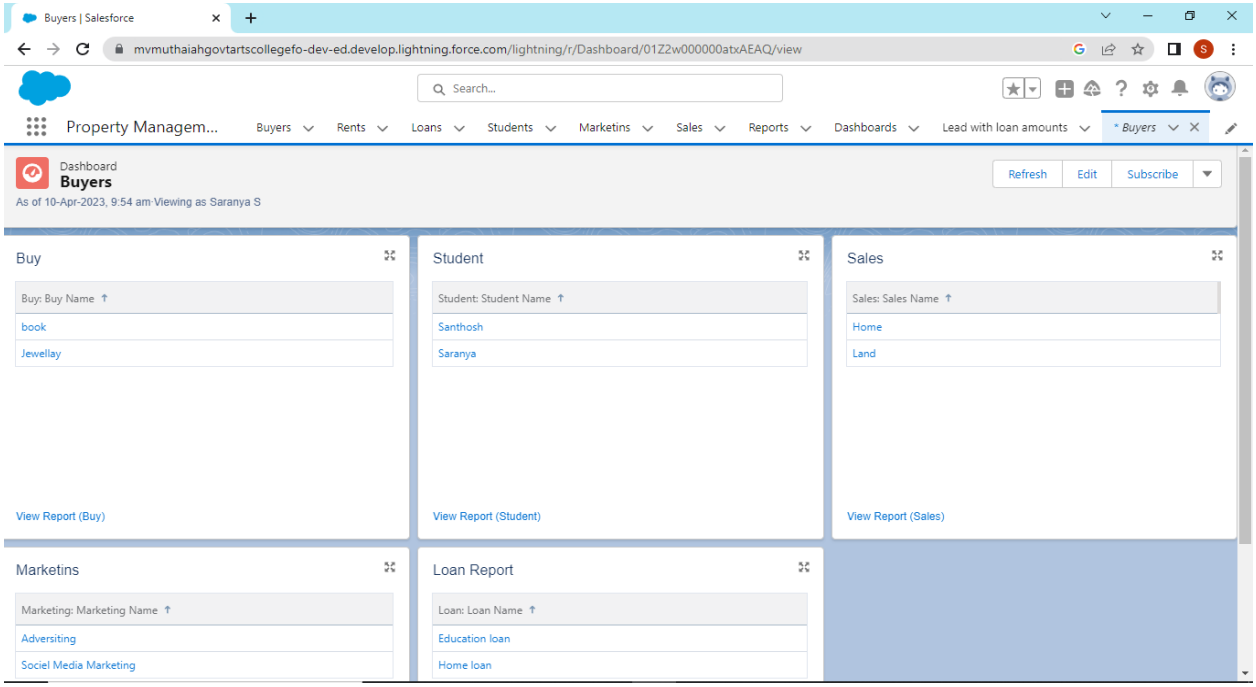
1. Go to the App Launcher and select the Dashboards

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


New Lead With Loan Amount | S
mvmuthaiahgovtartscollegefo-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000atx5EAA/view
Search...
Property Managem...
Buyers
Rents
Loans
Students
Marketins
Sales
Reports
* New Lead With Loan Amo...
More
Dashboard
New Lead With Loan Amount
As of 10-Apr-2023, 9:50 am·Viewing as Saranya S
Dashboards
Lead with loan amounts
Subscribe
Loan Report
Loan: Loan Name
Education loan
Home loan
View Report (Loan Report)
Student
Student: Student Name
Santhosh
Saranya
View Report (Student)
Sales
Sales: Sales Name
Home
Land
View Report (Sales)
Marketins
Marketing: Marketing Name
Adversiting
Sociel Media Marketing
Rent
Rent: Rent Name
Home
Hotel


Buyers | Salesforce
mvmuthaiahgovtartscollegefo-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000atxAEAQ/view
Search...
Property Managem...
Buyers
Rents
Loans
Students
Marketins
Sales
Reports
Dashboards
Lead with loan amounts
* Buyers
Dashboard
Buyers
As of 10-Apr-2023, 9:54 am·Viewing as Saranya S
Refresh
Edit
Subscribe
Buy
Buy: Buy Name
book
Jewellay
View Report (Buy)
Student
Student: Student Name
Santhosh
Saranya
View Report (Student)
Sales
Sales: Sales Name
Home
Land
View Report (Sales)
Marketins
Marketing: Marketing Name
Adversiting
Sociel Media Marketing
Loan Report
Loan: Loan Name
Education loan
Home loan

4 Trailhead Profile Public URL

Team Lead-S.Shiny-https://trailblazer.me/id/smathstm029

Team Member1-S.Saranya

Team Member2-A.Sathiyavani muthu

Team Member3-S.Sowmiya

4.Advantage &Disadvantage

Advantages:

- Manage pricing and inventories dynamically.
- Automate based on your business processes.
- Integrated with all major online travel portals.
- Maximize operational efficiency and profitability.
- Can be integrated with other AppExchange applications.

Disadvantages:

- Configuration and setup is complex and time consuming.
- Cluttered interface makes navigation and simple tasks unnecessarily complex.
- The learning curve never seems to end.
- Customer support has a poor reputation
- Getting users to adopt the system.

5 Applications

- A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties.
- PMS is also used in manufacturing. A property management system is sometimes referred to as a hotel operating system or hotel OS.
- A property management system (PMS) is software that facilitates a hotel's reservation management and administrative tasks.
- The most important function include **front-desk operations, reservations, channel management, housekeeping, rate and occupancy management, and payment processing.**

6 Conclusion

Man a company's sales force is important because it may help improve the efficiency and success of the sales team. This can help increase company revenue and create a positive work environment for sales team members.

THANKING YOU…