

## **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>.

## **Overview**

### **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 we have learnt :-**

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

## **Purpose**

Property management is the supervision of residential, commercial, and industrial properties, including apartments, detached houses, condominium units, and shopping centres. It typically involves administering property owned by another party or entity. On behalf of the lender, the property manager works to protect the integrity of the property while producing revenue.

A few real estate brokers also work as property managers in land management. For example, a resort town broker may provide services to buyer's and seller's agents, as well as property management services. The real estate brokers will also list, show, and lease vacation rentals when that is the case.

Property managers assist owners in creating budgets, advertise rental properties, qualify tenants, and collect rent. They also comply with the local landlord and real estate board laws and maintain the property. Preventive maintenance, cleaning, interior and exterior, and construction will all fall within the scope of the responsibilities of a property management firm.

Owners pay a fee or a percentage of the rent generated by a property while it is under management.

Salesforce property management enables the realty managers to keep track of crucial data about financial & household properties incorporating associated cash flow, primary tenants, and occupancy rates.

## **Problem Definition & Design Thinking**

### **Empathy Map:-**

An empathy map is a collaborative tool teams can use **to gain a deeper insight into their customers**. Much like a user persona, an empathy map can represent a group of users, such as a customer segment. The empathy map was originally created by Dave Gray and has gained much popularity within the agile community.

Developing customer profiles, sometimes referred to as customer personae, is a hot topic. The concept makes sense. In order to better understand your customer, create a fictitious profile of them complete with their name, job title, industry, educational background, pain points and ideal solutions. This can be done within a framework of a customer empathy map that will help to guide your discussion. Such a map is developed around the five senses, which will make it easier for you to summarize the customer experience and how customers perceive your organization.

## Template



## Empathy map

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



### Build empathy

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

#### Says

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



From the layout of your website - graphics, font, and so on - an online visitor has plenty to take in. Make sure that the overall look and feel presenting on the screen is consistent with your brand. As well, because you are a "Seeing" company, "Seeing" goes beyond your primary web presence and extends to any social media channel they may visit. Make sure the visual story hangs together across all platforms.

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

There are multiple avenues for customers to hear from and about you, many of which are within your control. Listen through your advertising and marketing department. Your marketing department likely has this aspect of research and analysis buttoned down, but what about other departments? Your auto attendant and HR need to reflect and understand. Think of every means by which your customers hear from you. Whether it's text, video, audio or graphics, they may also be hearing the same message.



Salesforce



This may seem obvious, but you need to think about what it is that you want your customers to do. If you run a personal utility site, make sure that you take user usability into account when designing the site. Encourage seamless navigation to encourage better follow-through. A common mistake new companies make is not knowing what to do with their content. Providing easily accessible step-by-step guides in the form of video tutorials, text-based knowledge articles, and Q&A forums will also bolster your ability to engage users. Everyone learns differently, so using a variety of media to share information along the appropriate steps for an effortless user experience is important.

To glean information about the customer experience, you need to listen in on the conversation and engage customers in a variety of places. Remember, etc., to keep an ear to the ground for customer discussions taking place outside of traditional media. One way of being the pulse of a customer's feelings is to regularly speak with people who have purchased something recently. By doing this, you can learn who your champions are, who may be detractors, and also people who might need a little extra TLC.



To glean information about the customer experience, you need to listen in on the conversation and engage customers in a variety of places. Remember, etc., to keep an ear to the ground for customer discussions taking place outside of traditional media. One way of being the pulse of a customer's feelings is to regularly speak with people who have purchased something recently. By doing this, you can learn who your champions are, who may be detractors, and also people who might need a little extra TLC.

#### Does

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

#### Does

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

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

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Need some inspiration?  
See a finished version of this template to kickstart your work.  
[Open example →](#)



## **Ideation & Brainstorming Map:-**

It basically means is **taking all ideas out of your mind and organize those into a map**. The map looks like the picture of your brain. When one level is done and the whole picture is visual, your brain automatically starts developing those ideas, incrementing ideas to more ideas, assuming relationships between them.

Brainstorming is used to generate more ideas in a short span of time and later organizing & rating the ideas. Mind mapping is a technique used to visually organize information and shows relationships among parts of the whole.



# **Result**

## **Data Model:-**

Object Name	Fields in the Object	
	Field Label	Data Type
Saturo	Client Name	Text
	State	Picklist
	City	Picklist
	Phone	Phone
	Email	Email
Buy	Buyer's Name	Text
	State	Picklist
	City	Picklist
	Property Type	Picklist
	Discount	Percent
	Annual Amount To Be Paid	Currency
Loan	Client Name	Text
	Loan ID	Number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total Loan Instalments	Number
	Loan Repayment	Number
Rent	Loan Amount	Formula (Currency)
	Name	Text
	Rental City	Text
	BHK type	Picklist

## **Activities & Screenshot:-**

### **1-Developing Account**

#### **Activity1:**

#### **Creating Developer Account**

Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developer.salesforce.com/)

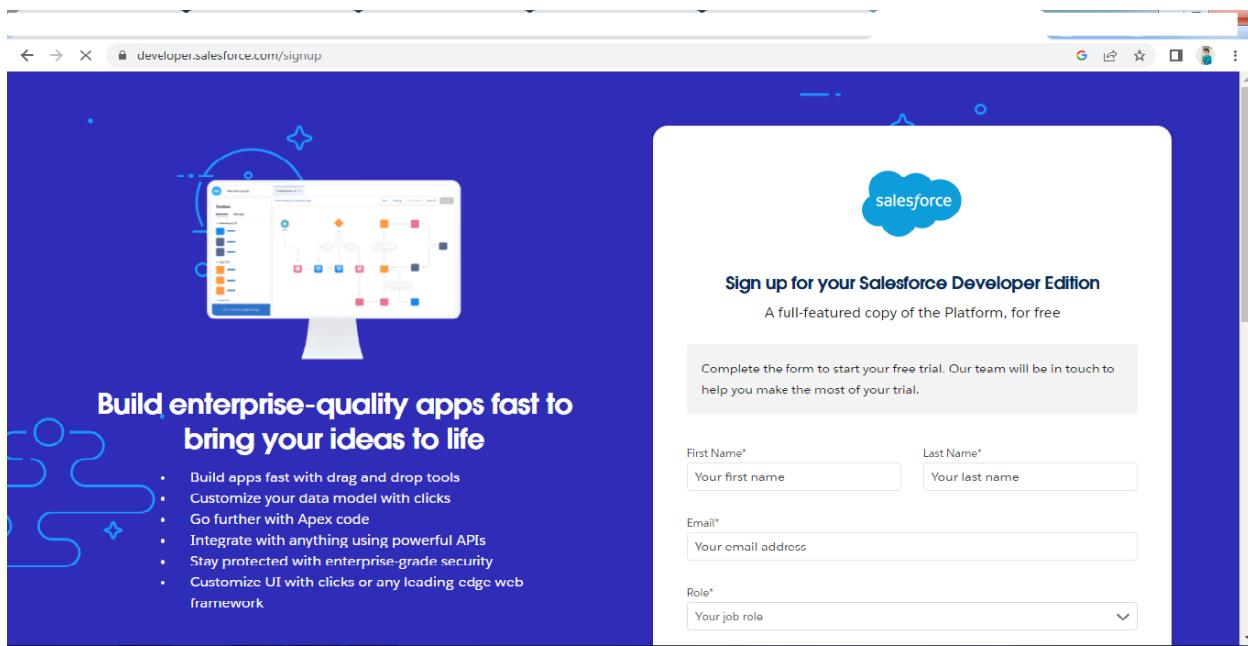
2. Click on sign up.

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](mailto:username@organization.com)

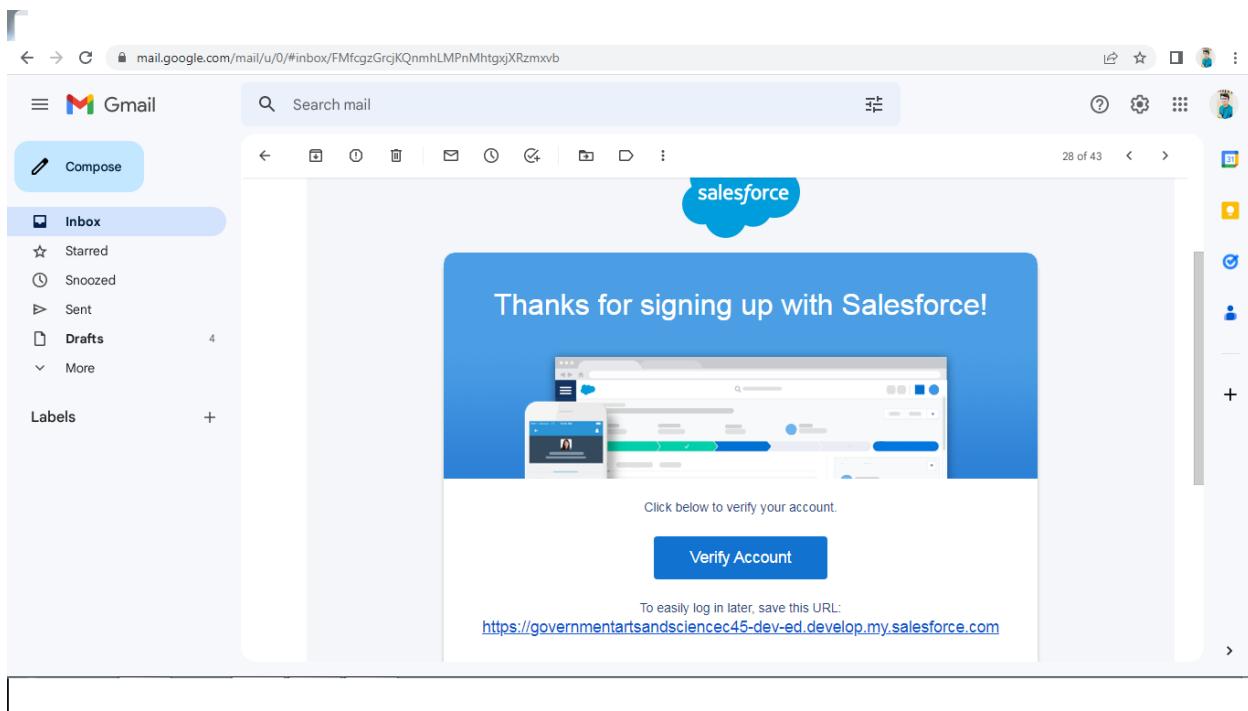
Click on sign up after filling these



## Activity 2-

### **Account Activation**

1. Go to the inbox of the email that you used while signing up.
2. Click on the verify account to activate your account. The email may take 5-10mins, as 2.
3. Login To Your Salesforce Account



## 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:

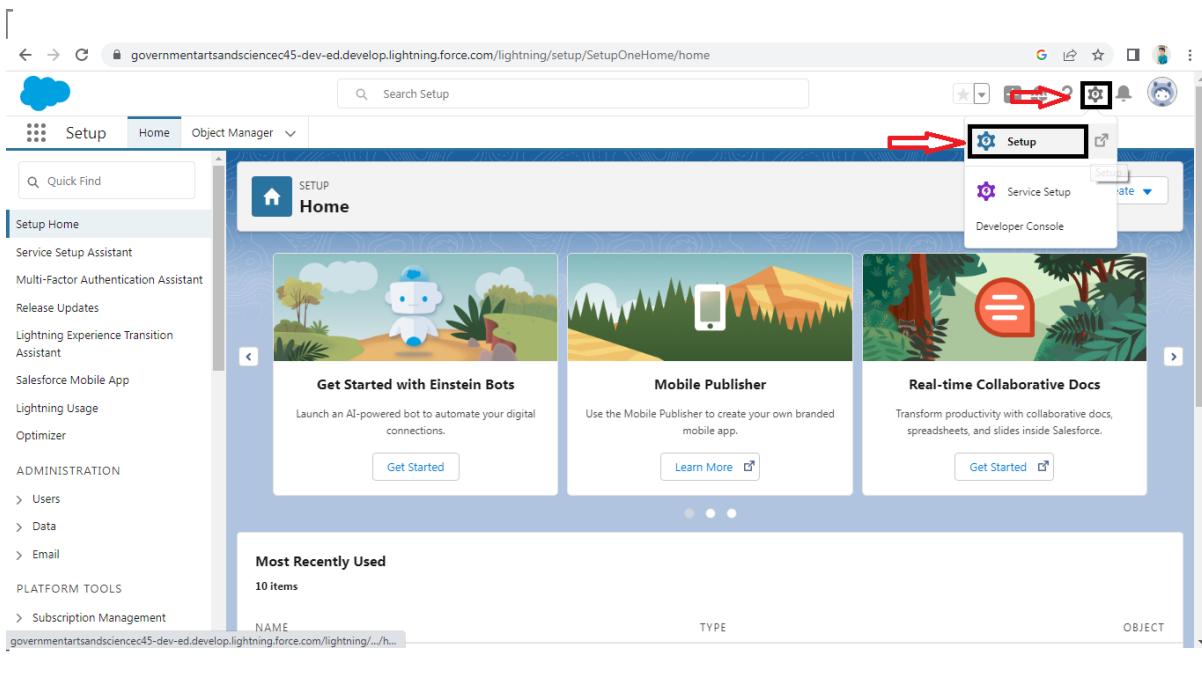
- Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

### Activity1:

#### **Objects**

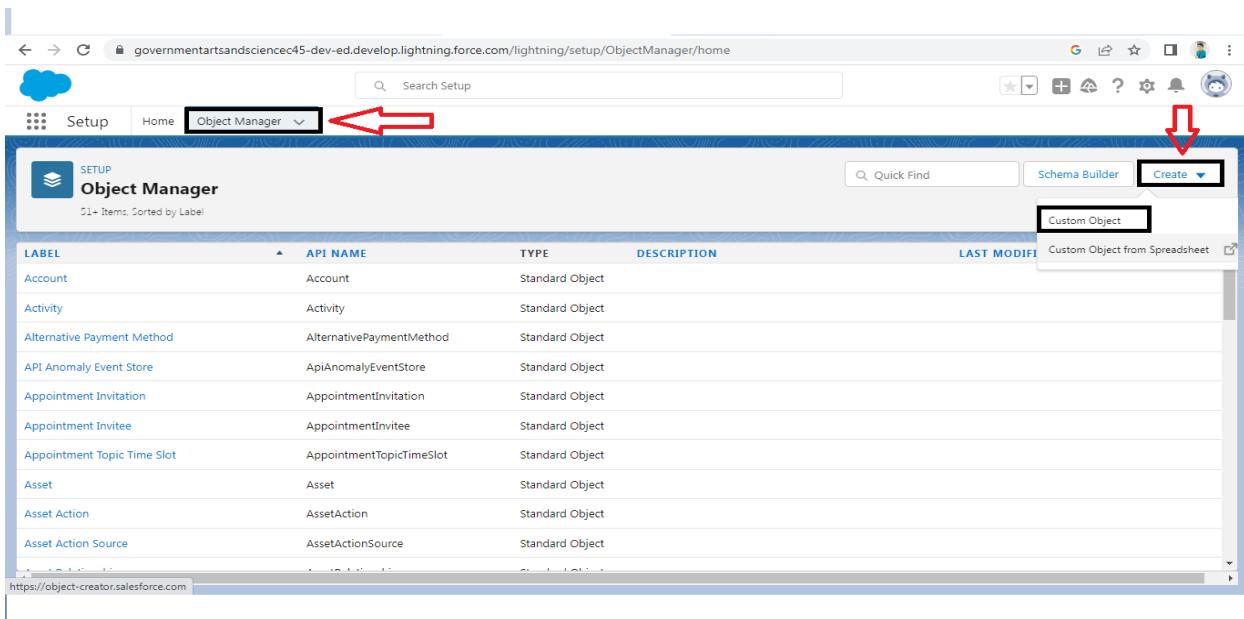
#### **To Navigate to Setup page:**

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

[governmentartsandsciencec45-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new](https://governmentartsandsciencec45-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new)

Custom Object Definition Edit

Custom Object Information

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

Plural Label: Example: Account

Starts with vowel count:

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 (selected) | Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name

Data Type: Text

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

[governmentartsandsciencec45-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new](https://governmentartsandsciencec45-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new)

Custom Object Definition Edit

Content Name:

Enter Record Name Label and Format

Record Name: Example: Account Name

Data Type: Text

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- 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

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 Back & New Cancel

The screenshot shows the Salesforce Setup Object Manager interface for the 'Sastro' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main 'Details' tab is selected. The 'Fields & Relationships' section shows the API Name as 'Sastro\_\_c'. The 'Custom' checkbox is checked. The 'Singular Label' is 'Sastro' and the 'Plural Label' is 'Sastro's'. The 'Details' section includes fields for Description, Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons at the top right.

## Activity2:

### Create Object Buy

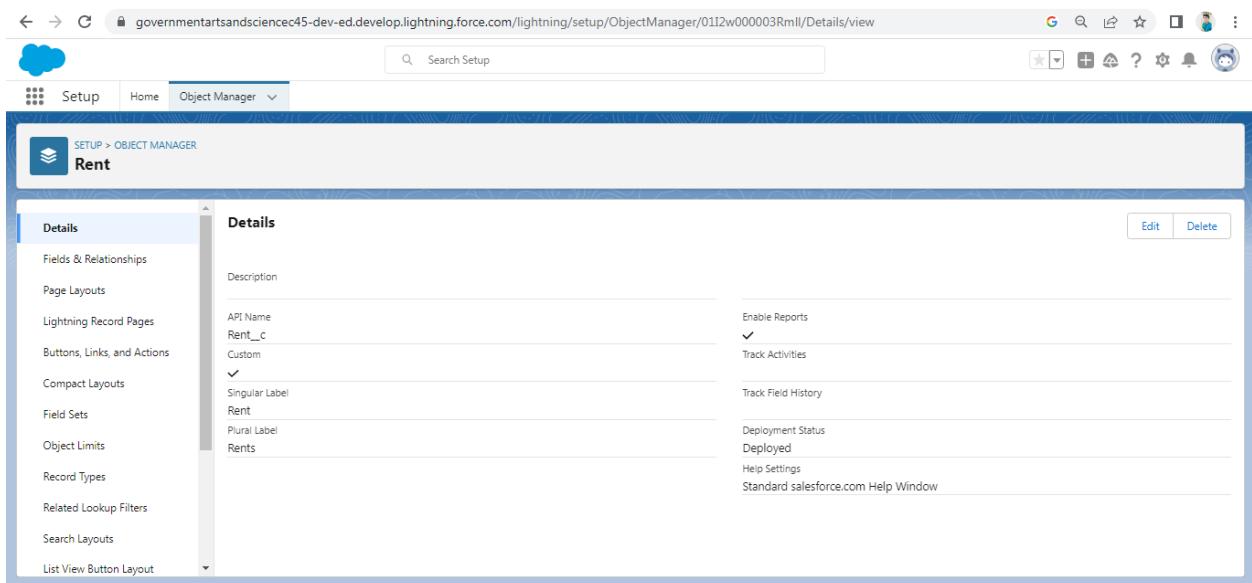
1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name→Buy
4. plural label name→ Buyers
5. click on Allow reports,
6. Allow search → Save

The screenshot shows the Salesforce Setup Object Manager interface for the 'Buy' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main 'Details' tab is selected. The 'Fields & Relationships' section shows the API Name as 'Buy\_\_c'. The 'Custom' checkbox is checked. The 'Singular Label' is 'Buy' and the 'Plural Label' is 'Buyers'. The 'Details' section includes fields for Description, Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons at the top right.

### **Activity3:**

#### **Create Object Rent**

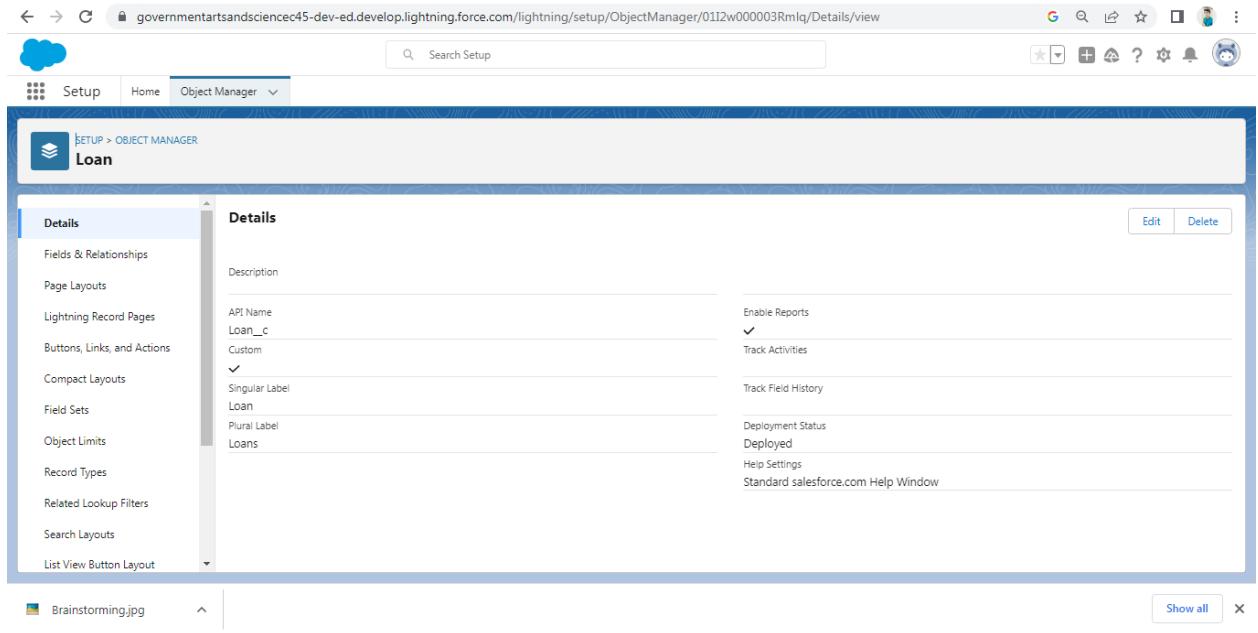
1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name→Rent
4. plural label name→ Rents
5. click on Allow reports,
6. Allow search → Save



### **Activity4:**

#### **Create Object Loan**

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→Loan
4. plural label name→ Loans
5. click on Allow reports,
- 6.Allow search → Save



### 3- Tab

#### What is Tab?

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

#### Types of Tab

- Custom object tab
- Web tab
- Visualforce tab

#### Activity 1:

#### Create the Lightning Tab

To create a Tab:(Saturo)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)

The screenshot shows the Salesforce Setup interface. In the top navigation bar, the 'Home' tab is highlighted. A red box highlights the 'Object Manager' tab in the top right. Below the navigation, there's a search bar with 'tab' typed into it, and a red box highlights the search icon. On the left sidebar, under 'User Interface', the 'Tabs' section is selected, indicated by a red arrow. A red box highlights the 'Tabs' link. The main content area is titled 'Custom Tabs' and contains a table of 'Custom Object Tabs'. A red box highlights the 'New' button at the top right of the table. The table has columns for Action, Label, Tab Style, and Description. Several tabs are listed, such as 'Buildings', 'Loans', 'Properties', 'Rentals', 'Rents', and 'Saturo's'. A red arrow points to the 'Saturo's' row.

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

The screenshot shows the 'New Custom Object Tab' wizard, Step 1 of 3. The top navigation bar shows 'Home' and 'Object Manager'. The left sidebar shows 'User Interface' and 'Tabs'. The main content area is titled 'Step 1. Enter the Details' and says 'Choose the custom object for this new custom tab. Fill in other details.' A red box highlights the 'Object' dropdown menu, which is set to '--None--'. A red arrow points to the 'Tab Style' dropdown menu, which is also set to '--None--'. Below these fields, there's an optional section for a 'Splash Page Custom Link' with a dropdown set to '--None--'. At the bottom, there's a 'Description' field with an empty text area. A red arrow points to the 'Next' button at the bottom right of the form.

## **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

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The 'Buyers' tab is selected and highlighted with a red box. Other tabs listed include Energy Audits, Loans, Properties, Rentals, Rents, and Saturo's. The 'Tab Style' column shows various styles like Building, Sun, Car, Building Block, and Building.

Action	Label	Tab Style	Description
Edit   Del	Buyers	Building	
Edit   Del	Energy Audits	Sun	
Edit   Del	Loans	Building	
Edit   Del	Properties	Car	
Edit   Del	Rentals	Building Block	
Edit   Del	Rents	Building	
Edit   Del	Saturo's	Building	

## 4- The Lightning App:

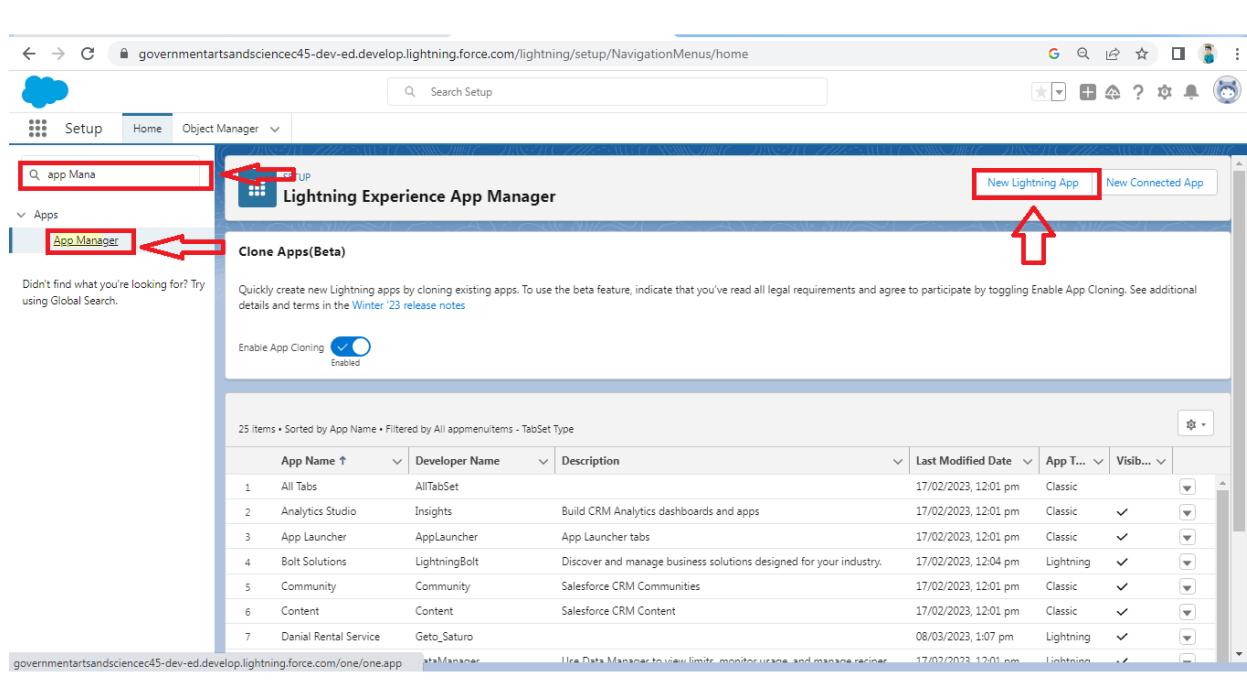
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.

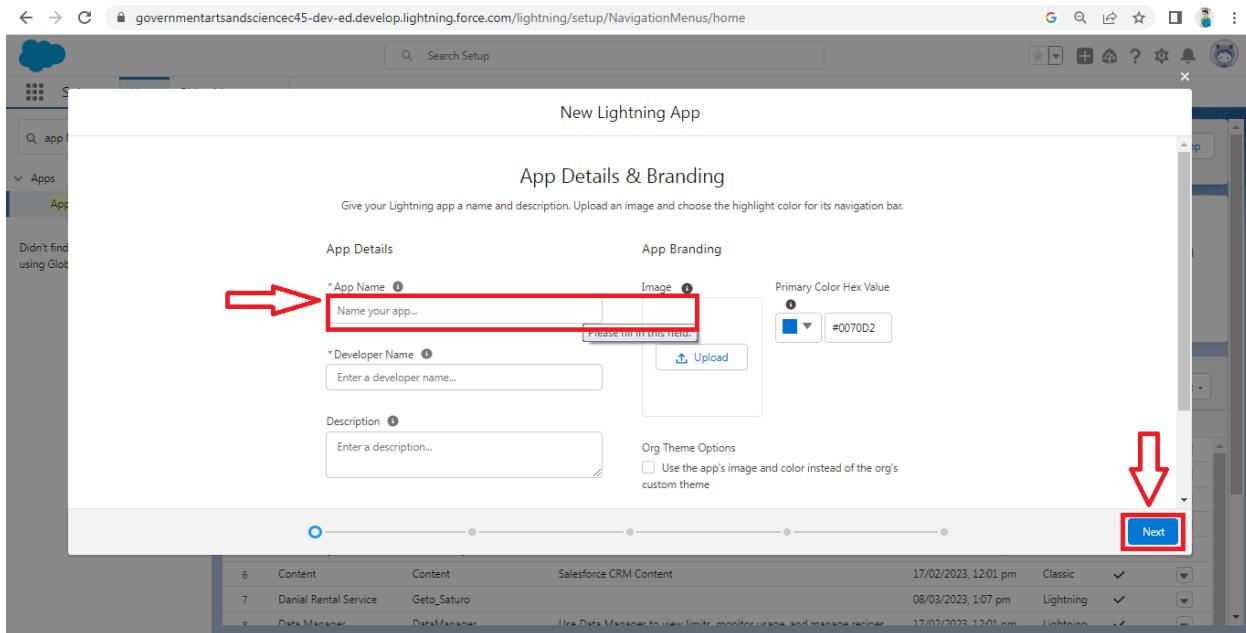
### Activity1:

#### Create the Lightning App

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

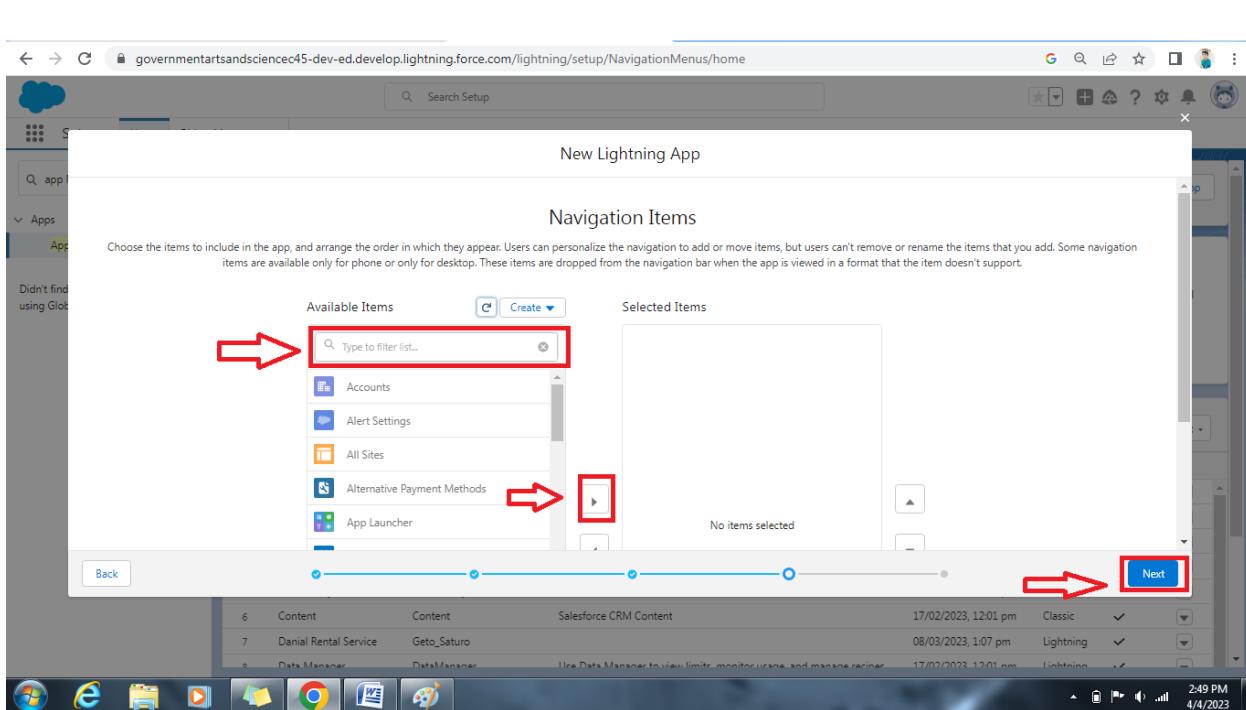


2. Fill the app name as an Property Management in app details and branding →Next → (App option page) keep it as default → Next
3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Saturo, Buy, Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform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

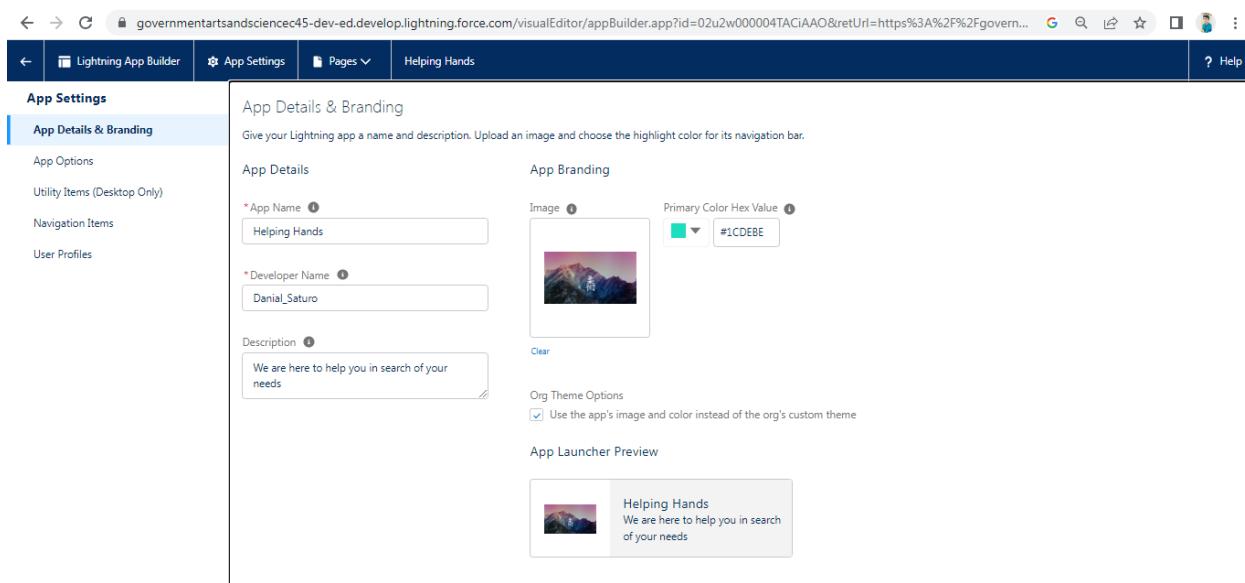
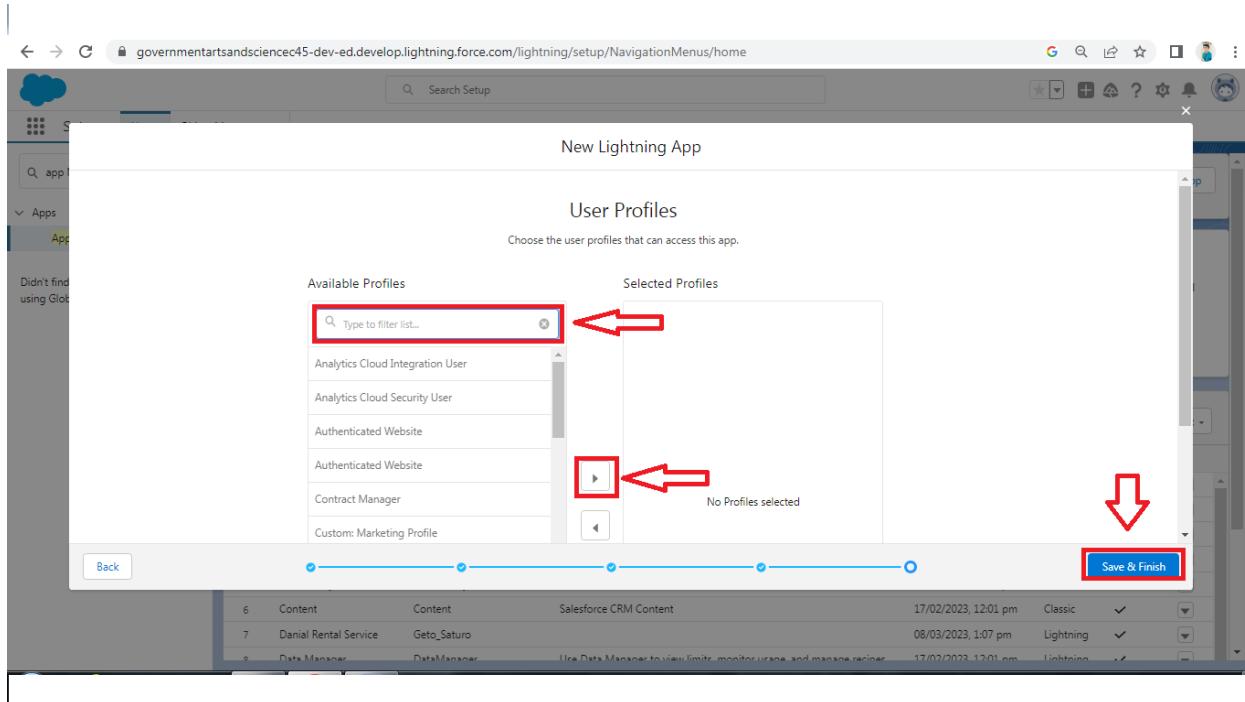


#### 4. To Add Navigation Items:

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



## 5-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 Saturo Field

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

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with links for Setup, Home, and Object Manager. A red arrow points to the 'Object Manager' link. Below the navigation bar is a search bar labeled 'Search Setup' and a 'Quick Find' search bar. Another red arrow points to the 'Quick Find' bar. The main area is titled 'Object Manager' and shows a list of objects. A third red arrow points to the 'Saturo' object in the list, which is highlighted. The list includes various objects like Scorecard, Scorecard Association, Scorecard Metric, Seller, Service Appointment, etc. Each entry shows the object name, its label, and its type (e.g., Custom Object, Standard Object). The 'Saturo' entry shows 'Saturo\_c' as the label and 'Custom Object' as the type.

Name	Label	Type
Saturo	Saturo_c	Custom Object
Scorecard	Scorecard	Standard Object
Scorecard Association	ScorecardAssociation	Standard Object
Scorecard Metric	ScorecardMetric	Standard Object
Seller	Seller	Standard Object
Service Appointment	ServiceAppointment	Standard Object
Service Contract	ServiceContract	Standard Object
Service Resource	ServiceResource	Standard Object
Service Resource Skill	ServiceResourceSkill	Standard Object
Service Territory	ServiceTerritory	Standard Object
Service Territory Member	ServiceTerritoryMember	Standard Object
Service Territory Work Type	ServiceTerritoryWorkType	Standard Object
Session Hijacking Event Store	SessionHijackingEventStore	Standard Object

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

FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	Picklist	State	
Client Name	Name	Text(80)	
Created By	CreatedById	Lookup(User)	
Email	Email		
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Phone	Phone	Phone	
Saturo's	Saturo_s__c	Auto Number	
State	State__c	Picklist	

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

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship

**Step 2. Enter the details**

Step 2 of 4

Field Label:

Display Format:  Example: A-(000) What Is This?

Starting Number:

Field Name:   Generate Auto Number for existing records

Description:

Help Text:

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

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

## Create the remaining Fields:

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

**Saturo:** (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

State:	Maharashtra	Gujarat	Rajasthan	Tamil Nadu	Telangana
City:	Mumbai	Mumbai	Mumbai	Mumbai	Mumbai
	Pune	Pune	Pune	Pune	Pune
	Nashik	Nashik	Nashik	Nashik	Nashik
	Chennai	Chennai	Chennai	Chennai	Chennai
	Bangalore	Bangalore	Bangalore	Bangalore	Bangalore
	Visakhapatnam	Visakhapatnam	Visakhapatnam	Visakhapatnam	Visakhapatnam
	Hyderabad	Hyderabad	Hyderabad	Hyderabad	Hyderabad

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Picklist	State	✓
Client Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		✓
Email	Email_c	Email		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone_c	Phone		✓
Saturo	Saturo_c	Auto Number		✓
State	State_c	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

The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed. The main area displays the 'Fields & Relationships' section for the 'Buy' object. The table lists the following fields:

Field Label	Name	Type
Annual_Amount_To_Be_Paid_c	Annual_Amount_To_Be_Paid_c	Currency(18, 0)
Buy	Buy_c	Auto Number
Buyer's Name	Name	Text(80)
City	Pune_c	Picklist (Multi-Select)
Created By	CreatedBy	Lookup(User)
Discount	Discount_c	Percent(18, 0)
Last Modified By	LastModifiedBy	Lookup(User)
Owner	OwnerId	Lookup(User/Group)
Property_Type	Property_Type_c	Picklist
State	State_c	Picklist

## **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)

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	Pune__c	Text(70)		

## 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)
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  

$$(\text{Loan_Repayment\_c} * (((1+(\text{Interest_rate\_c} /52))^\text{Term\_c}) -1))/((\text{Interest_rate\_c} /52)*((1+(\text{Interest_rate\_c} /52))^\text{Term\_c}))$$

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Client Name	Name	Text(80)		
Created By	CreatedById	Lookup(User)		✓
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amoun	Loan_Amoun__c	Formula (Currency)		
Loan ID	Loan_ID__c	Number(9, 9)		
Loan Repayment	Loan_Repayment__c	Number(18, 0)		
Owner	OwnerId	Lookup(User/Group)		✓
Term	Term__c	Number(18, 0)		
Total Loan Instalments	Total_Loan_Instalments__c	Number(18, 0)		

## 6- Profile

- 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

#### 1. 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
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.

### **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.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>

## 7-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.
2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Address:** governmentartsandsciencec45-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
- Search Bar:** Q Search Setup
- Header:** Setup, Home, Object Manager
- Left Sidebar:**
  - Q Users (highlighted with a red box and arrow)
  - Users (highlighted with a red box and arrow)
  - Permission Set Groups
  - Permission Sets
  - Profiles
  - Public Groups
  - Queues
  - Roles
  - User Management Settings (highlighted with a red box and arrow)
    - Users (highlighted with a red box and arrow)
  - Feature Settings
  - Data.com
  - Prospector Users
- Main Content:** All Users
  - On this page you can create, view, and manage users.
  - In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
  - View: All Users | Edit | Create New View
  - Buttons: New User (highlighted with a red box and arrow), Reset Password(s), Add Multiple Users
  - Table Headers: Action, Full Name, Alias, Username, Role, Active, Profile
  - Table Data:
 

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Export	Chatter	chatty@002w00000gyv0heab.yg05nh0tu1s@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	J.M.DHYANESHWAR PRASAATH	DJ M	dhyaneesh@chysics.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Selvaraj_Panimala	oselV	dhyaneeshm2002@gmail.com	VP_Marketing	<input checked="" type="checkbox"/>	Property Management
<input type="checkbox"/>	User_Integration	integ	integration@002w00000gyv0heab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightsecurity@002w00000gyv0heab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
  - Buttons at the bottom: New User, Reset Password(s), Add Multiple Users
  - Page Footer: A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

## 8-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
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

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar includes links for Setup, Home, Object Manager, and a search bar. Under 'Permission Set Groups', 'Permission Sets' is selected and highlighted with a red box. The main content area is titled 'Permission Sets' and contains a table listing various permission sets. The first column has checkboxes for 'Action' and 'Clone'. The second column lists labels like 'Buyer', 'Buyer Manager', 'CRM User', etc. The third column provides a brief description of each set. The fourth column shows the 'License' associated with each set. At the top of the list, there is a 'New' button with a red box around it, and below it, a 'Create New View' link.

## 9- Setup For OWD

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

- Public Read/Write/Transfer (only available of Leads and Cases)
- Public Read/Write
- Public Read/Only
- Private

### 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 Saturo, 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.

## **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.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer	✓
Account	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Opportunity	Controlled by Parent	Controlled by Parent	✓
Case	Public Read/Write	Private	✓
Campaign	Public Read/Write/Transfer	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

## **10-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:**

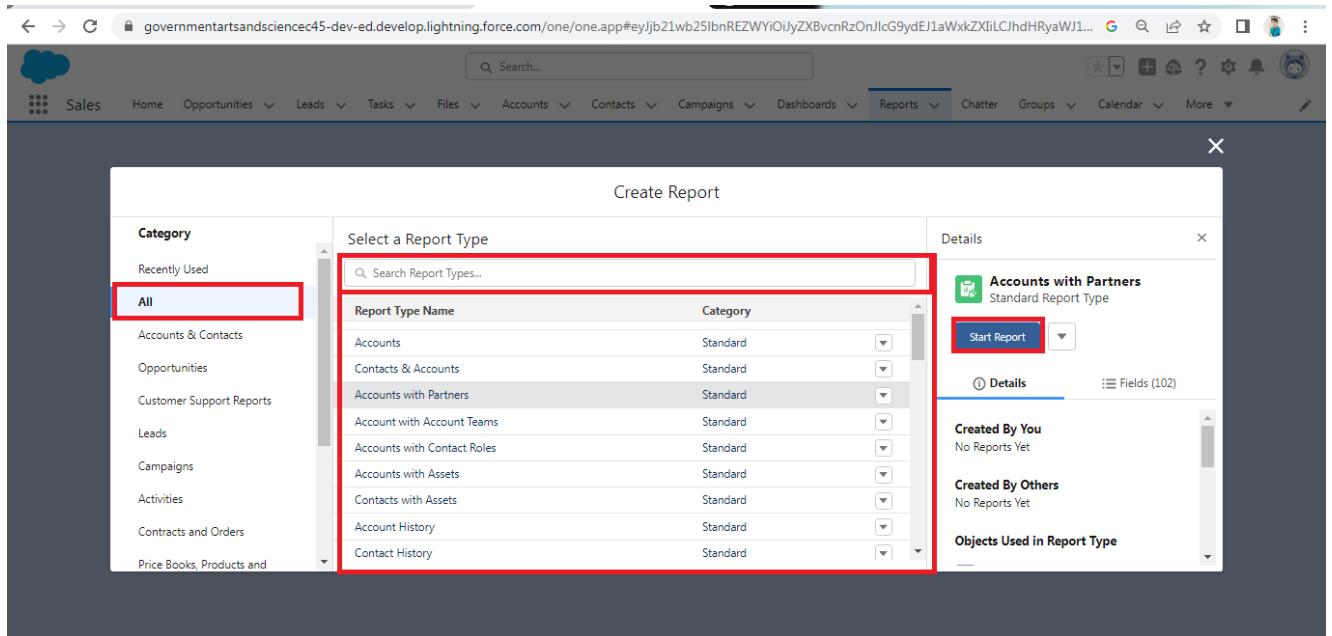
#### Create Report

1. Go to the app → click on the reports tab.
2. Click New Report.
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.

#### 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\$.

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	17/2/2023, 12:01 pm	
New Loans Report		Private Reports	DHYANESHWAR PRASAATH J M	31/3/2023, 2:13 pm	



## 11-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

The screenshot shows the Salesforce Lightning Home page. At the top, there is a navigation bar with links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The 'Dashboards' link is highlighted with a red box. Below the navigation bar is a search bar labeled 'Search...'. To the right of the search bar are several icons. The main content area is titled 'Dashboards' and has a sub-section titled 'Recent'. It displays two items: 'Loan' and 'Rents', both listed under the 'Private Dashboards' category. A 'New Dashboard' button is located at the top right of this section, also highlighted with a red box. On the left side, there is a sidebar with sections for DASHBOARDS (Recent, Created by Me, Private Dashboards, All Dashboards), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). At the bottom left, there is a 'To Do List' icon.

## Activity2:

### Create Dashboard

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

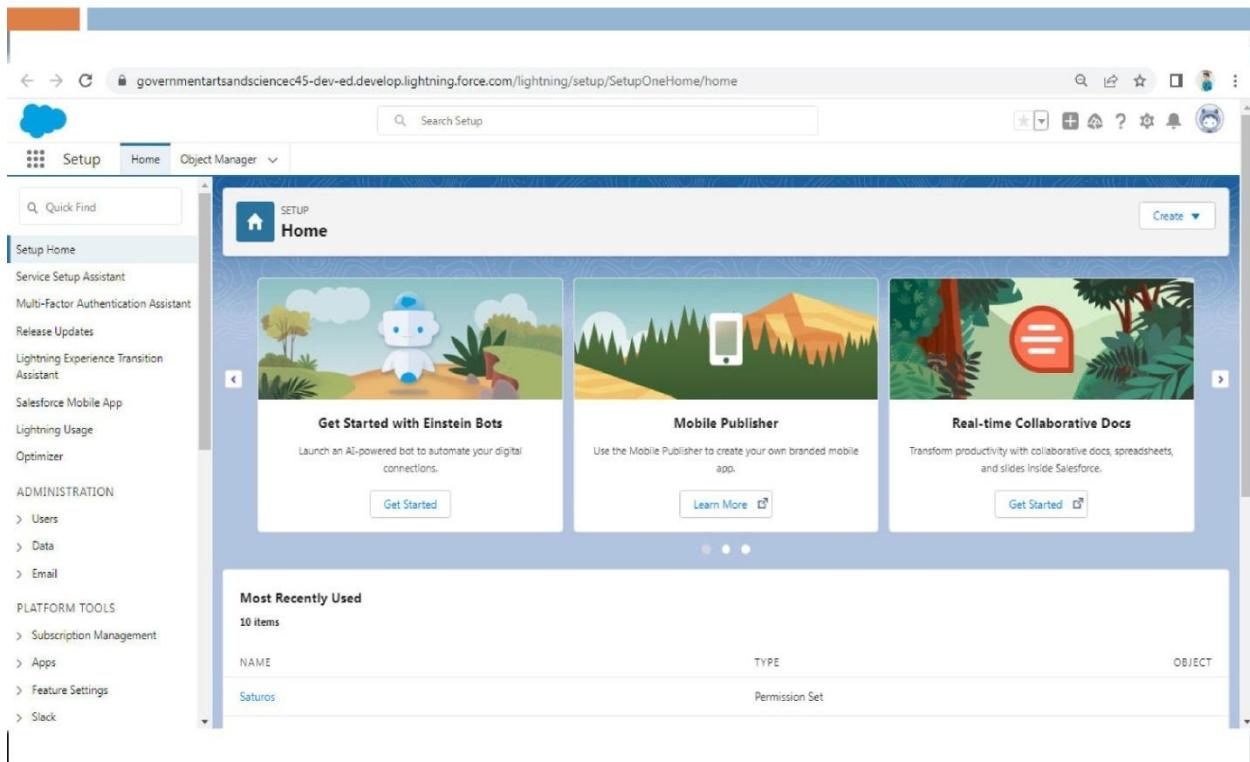
The screenshot shows the Salesforce Lightning Home page with a custom dashboard titled 'Loan'. The dashboard header includes a refresh icon, edit and subscribe buttons, and a note: 'Last refreshed 7 days ago. Refresh this dashboard to see the latest data.' Below the header, there is a chart titled 'Sample Flow Report: Screen Flows'. The chart is a gauge-style meter with a scale from 0 to 100. The needle is positioned at 0. Below the chart, there is a link: 'View Report (Sample Flow Report: Screen Flows)'. The background of the dashboard is light blue.

The screenshot shows a Salesforce Lightning interface. At the top, there's a navigation bar with links for 'Helping Hands', 'Saturo's', 'Buyers', 'Loans', 'Rents', 'Reports', 'Loan', and a search bar. Below the navigation is a message: 'As of 09-Apr-2023, 1:31 am Viewing as DHYANESHWAR PRASAATH J M'. A sidebar on the left lists 'Relat', 'Rent', 'Sury', 'R', 'R-00', 'Renta', 'Kalla', 'BHK t', '2BHK', 'Creat', and 'Helping H'. The main content area displays a report titled 'New Loans Report' with a table showing client names: Bhagavathpandi, Manikandan S, Manoj K, Sudhakar S, and Suriyaprakash. Below the table is a link 'View Report (New Loans Report)'. The background features a blue topographic map.

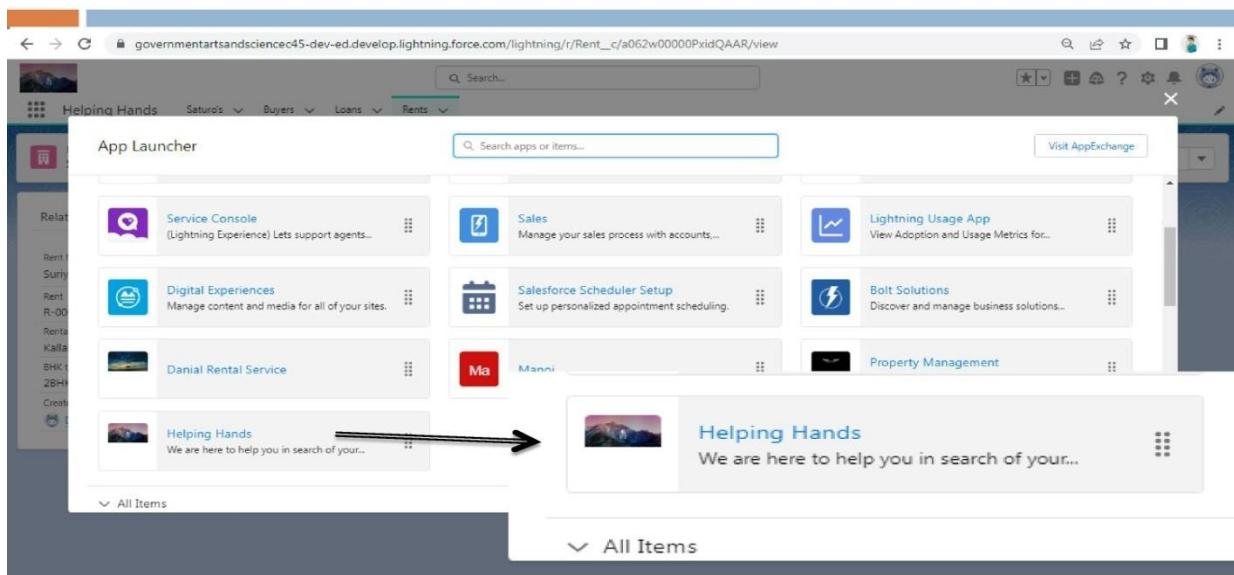
## Final Output

The screenshot shows the App Launcher in a Salesforce Lightning interface. The top navigation bar is identical to the previous screenshot. The main area displays the 'App Launcher' with a search bar and a 'Visit AppExchange' button. It lists several apps: 'Service Console' (Lightning Experience), 'Sales' (Manage your sales process), 'Lightning Usage App' (View Adoption and Usage Metrics), 'Digital Experiences' (Manage content and media), 'Salesforce Scheduler Setup' (Set up personalized appointment scheduling), 'Bolt Solutions' (Discover and manage business solutions), 'Danial Rental Service' (highlighted in red), 'Manoj' (highlighted in red), and 'Property Management'. A link 'All Items' is at the bottom of the list. The background is dark grey.

# Developer Account



# App Launcher



# Saturo's

The screenshot shows a Salesforce Lightning interface with the URL [governmentartsandsciencec45-dev-ed.lightning.force.com/lightning/o/Saturo\\_c/list?filterName=Recent](https://governmentartsandsciencec45-dev-ed.lightning.force.com/lightning/o/Saturo_c/list?filterName=Recent). The page title is "Saturo's Recently Viewed". The navigation bar includes links for "Helping Hands", "Saturo's", "Buyers", "Loans", "Rents", "Reports", and "Dashboards". A search bar at the top right contains the placeholder "Search...". The main content area displays a list titled "Recently Viewed" with 5 items, updated a few seconds ago. The list includes:

Client Name
1 Sudhakar S
2 Suryaprakash
3 Manoj K
4 Bhagavath Pandi R
5 Manikandan S

The screenshot shows a Salesforce Lightning contact detail page for "Sudhakar S". The URL is [governmentartsandsciencec45-dev-ed.lightning.force.com/lightning/r/Saturo\\_c/a042w00000zJJEZAA4/view](https://governmentartsandsciencec45-dev-ed.lightning.force.com/lightning/r/Saturo_c/a042w00000zJJEZAA4/view). The contact's name is displayed prominently at the top. The navigation bar and search bar are identical to the previous screenshot. The main content area shows the contact's details under the "Details" tab. The fields and their values are:

Client Name	Owner
Sudhakar S	DHYANESVAR PRASAATH J M
Saturo's	
5	
State	Tamil Nadu
City	Chennai
Email	sudha.baby4946@gmail.com
Phone	6379381785
Created By	DHYANESVAR PRASAATH J M, 07/04/2023, 1:05 pm
Last Modified By	DHYANESVAR PRASAATH J M, 07/04/2023, 1:05 pm

# Buyer's

The screenshot displays two screenshots of a Salesforce Lightning application interface.

**Screenshot 1: Recently Viewed List**

This screenshot shows a list titled "Recently Viewed" under the "Buyers" category. The list contains 5 items, all updated a few seconds ago. The items are:

- 1. Sudhakar
- 2. Suriyaprakash
- 3. Manikandan S
- 4. Bhagavath Pandi
- 5. Manoj K

**Screenshot 2: Detailed View of Buyer Record**

This screenshot shows the detailed view for the buyer "Sudhakar". The record ID is a052w00000Gd72cAAB. The "Details" tab is selected. The record fields include:

- Buyer's Name: Sudhakar
- Buy: L-0004
- Property Type: Residential
- Discount: 25%
- State: Maharashtra
- City: Pune
- Annual Amount To Be Paid: ₹9,00,000
- Created By: DHYANESVAR PRASAATH J M (09/04/2023, 1:01 am)
- Last Modified By: DHYANESVAR PRASAATH J M (09/04/2023, 1:01 am)

The top navigation bar includes links for "Helping Hands", "Saturo's", "Buyers", "Loans", "Rents", "Reports", and "Dashboards". The bottom navigation bar includes links for "New", "Import", "Change Owner", "Search this list", and various icons for navigation and search.

# Loan's

The screenshot displays two screenshots of a Salesforce Lightning application interface.

**Top Screenshot:** A list view titled "Recently Viewed" under the "Loans" category. It shows a table with 5 items, all updated a few seconds ago. The columns include "Client Name" and a checkbox column. The items listed are:

Client Name
Suriyaprakash
Sudhakar S
Manikandan S
Bhagavathpandi
Manoj K

**Bottom Screenshot:** A detailed view of a specific loan record for "Suriyaprakash". The page title is "Loan Suriyaprakash". The "Details" tab is selected. The page includes fields for Client Name (Suriyaprakash), Owner (DHYANESVAR PRASAATH J M), and various financial details:

Field	Value
Client Name	Suriyaprakash
Owner	DHYANESVAR PRASAATH J M
Loan ID	/
Interest Rate	₹5,500
Term	/
Annual Loan	1,20,000
Total Loan Instalments	24
Loan Repayment	1,25,500
Loan Amoun	/

# Rent

The screenshot displays two screenshots of a Salesforce Lightning application interface.

**Screenshot 1: Rent List View**

The top screenshot shows the "Recently Viewed" section of the Rent list view. The URL is [governmentartsandsciencec45-dev-ed.lightning.force.com/lightning/o/Rent\\_c/list?filterName=Recent](https://governmentartsandsciencec45-dev-ed.lightning.force.com/lightning/o/Rent_c/list?filterName=Recent). The list contains 6 items, last updated a few seconds ago. The items are:

Rank	Rent Name
1	Suriyaprakash V
2	Sudhakar S
3	Manoj K
4	Bhagavathpandi
5	Dhyanesh
6	Manikandan S

**Screenshot 2: Rent Record Detail View**

The bottom screenshot shows the detail view for the rent record of Suriyaprakash V. The URL is [governmentartsandsciencec45-dev-ed.lightning.force.com/lightning/r/Rent\\_c/a062w00000PxdQAR/view](https://governmentartsandsciencec45-dev-ed.lightning.force.com/lightning/r/Rent_c/a062w00000PxdQAR/view). The record details are:

Field	Value
Rent Name	Suriyaprakash V
Rent	R-0005
Rental City	Kallakurichi
BHK type	2BHK
Created By	DHYANESVAR PRASAATH J M, 09/04/2023, 1:09 am
Owner	DHYANESVAR PRASAATH J M
Last Modified By	DHYANESVAR PRASAATH J M, 09/04/2023, 1:09 am

# Reports

The screenshot shows the Salesforce Reports page. The top navigation bar includes links for Helping Hands, Saturo's, Buyers, Loans, Rents, Reports, Dashboards, and Home. A search bar at the top right contains the placeholder "Search...". Below the navigation is a sidebar with categories: Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders), and Favorites (All Favorites). The main content area displays a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Three reports are listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Loans Report		Private Reports	DHYANESVAR PRASAATH J M	31/3/2023, 4:43 am	
New Accounts Report		Private Reports	DHYANESVAR PRASAATH J M	9/4/2023, 1:25 am	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	17/2/2023, 2:31 am	

# Dashboard

The screenshot shows the Salesforce Loan dashboard. The top navigation bar includes links for Helping Hands, Saturo's, Buyers, Loans, Rents, Reports, and Loan. A search bar at the top right contains the placeholder "Search...". The main content area features a "New Loans Report" card with the following details:

**Loan Client Name**:  
Bhagavathpandi  
Manikandan S  
Manoj K  
Sudhakar S  
Suriyaprakash

At the bottom of the card is a link: "View Report (New Loans Report)".

## **Advantages & Disadvantages**

Salesforce is currently the world's #1 customer relationship management (CRM) platform, and with good reason. It's used by thousands of businesses and organizations with a variety of goals and use cases and can be used to do everything from engaging customers with relevant digital marketing, launching ecommerce, providing great customer service, empowering teams to work efficiently from anywhere, growing businesses smarter and faster, and much more.

### **Advantages**



- Firstly, there is little to no risk when using Salesforce. Due to its low acquiring costs and low-risk management as an organization tool, there is very little to lose and a lot to benefit from.
- The database that Salesforce uses is also helpful in digitizing and organizing company sale records. Thus, improving the overall organization of a company.
- Salesforce and good customer service comes hand in hand. It allows customization of profiles for individual customers as well as quick, organized access to individual records
- There is also no need to purchase software and hardware systems to help maintain and keep the application running. Therefore, unlike most software, Salesforce requires no capital investment.
- The integrated solutions allow users to work more efficiently and increase the value of each part of the customer life cycle. Moreover, Salesforce analytics and its reporting function gives its users the ability to expand their campaign capacity. As a result, overall productivity can be increased and profit can be maximized.
- Since Salesforce is an application and no software is required, there is no need for constant updates as Salesforce will update automatically.

### **Disadvantages**

- At times, there can be too much customization and the interface can be filled with cumbersome and tedious tools which can be seen as repetitive or distracting.

- Some users face difficulties in the transition between transactions. Some have to go through multiple screens to process transactions.



- Salesforce has its own maintenance schedule since runs on its own cloud server. As a result, there are times that the application will not be accessible.
- Users can also lose a personal touch as in the process of automation
- Salesforce contains barriers to adoption. This means that even though Salesforce is cheap, the cost to integrate the application and redesigning their IT to incorporate it into a company is not the same as the cost of acquiring Salesforce. It is possible that the cost of integrating it can exceed the costs of the software itself.

## Applications

Tenants and clients today are mobile, social, and connected, and they anticipate responsive 1:1 connections. Salesforce For Real Estate is intended for property managers, developers, and investors who look forward to automating their association with tenants and clients.

**Salesforce Property Management**, a cloud-based CRM tool helps varied real estate agents businesses in tracking different information about residential and commercial properties. Salesforce Property Management has powerful tools to remain associated with clients and tenants continuously, support further connections, track key data about business and residential properties, including occupancy rates, essential tenants, and revenue and take your productivity, and business growth, to the next level.

## **Conclusion & Future Scope**

Salesforce is a comprehensive tool with an exhausting list of benefits and, despite its seeming complexity that can overwhelm at first, can become the best friend for property managers.

Each property management company can take advantage of the platform in its unique way due to its scalability and flexibility. And even if you don't want to spend time tuning the standard functionality of Salesforce, you can leverage its advantages with pre-configured Salesforce solutions for property management.

Once you are ready to welcome Salesforce CRM into your real estate agency and simplify the process of its implementation, then our Salesforce consulting services will be the best fit for you.

In the longer term, we expect Salesforce to integrate data science and big data capabilities to its Service Cloud and Marketing Cloud. This would result in automated customer service tasks (via Service Cloud) and would let marketers leverage data for predictive and targeted marketing (via Marketing Cloud). If this is done, it will be a step in the right direction, considering a report from MIT which stated that 71% of businesses invest in business intelligence and big data, of which 20% have said to have made substantial investments.