

Property Management Application Using

Salesforce - (Developer)

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 up to 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.

Salesforce

Introduction:

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

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

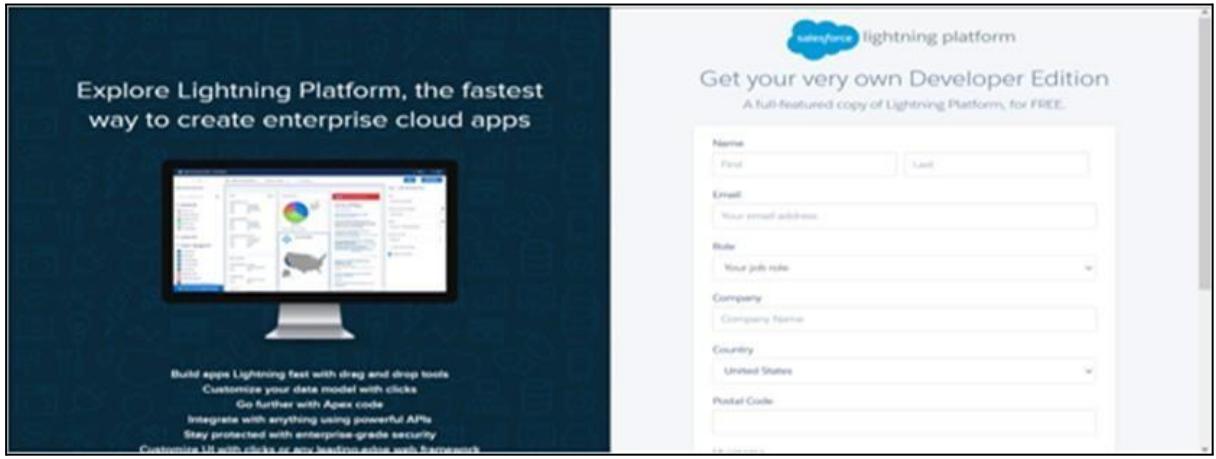
What Is Salesforce?

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

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

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

<https://youtu.be/r9EX3lGde5>

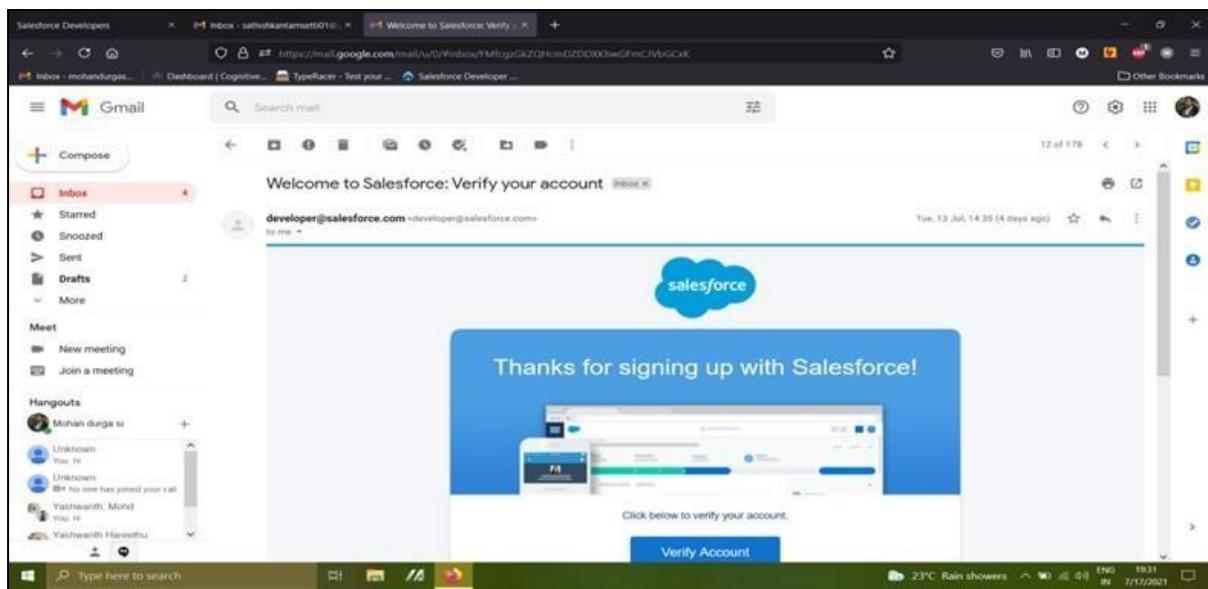


Creating Developer Account

- Creating Developer Account
- Creating a developer org in salesforce.
- Go to [developers.salesforce.com](https://developer.salesforce.com)/Click on sign up.
- On the sign up form, enter the following details :
- First name & Last name
- Email
- Role : Developer
- Company : College Name
- County : India
- Postal Code : pin code
- 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.

Account Activation

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



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:

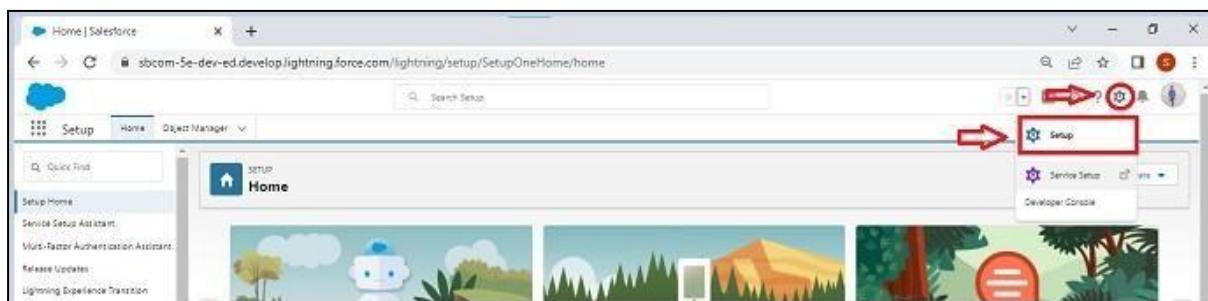
1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

Custom Objects - Enquiry, Property, Loan

Custom Objects-Enquiry, Property, Loan,

Create Enquiry Object

To Navigate to Setup page



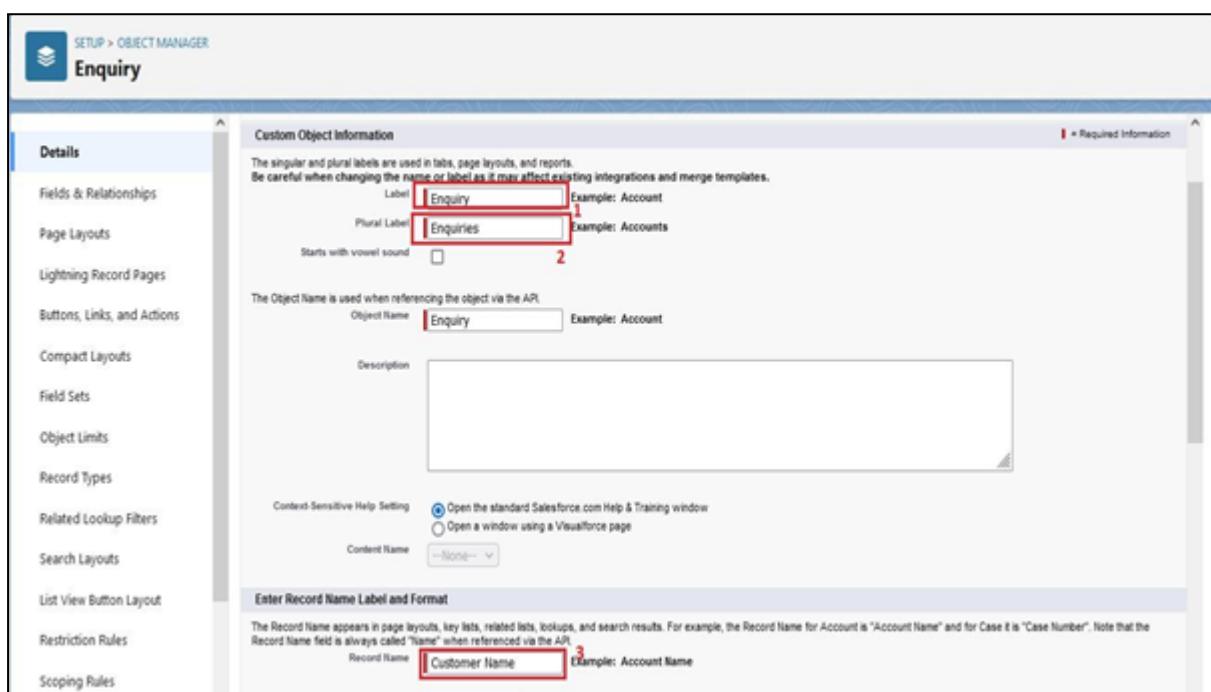
To create an object:

From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.

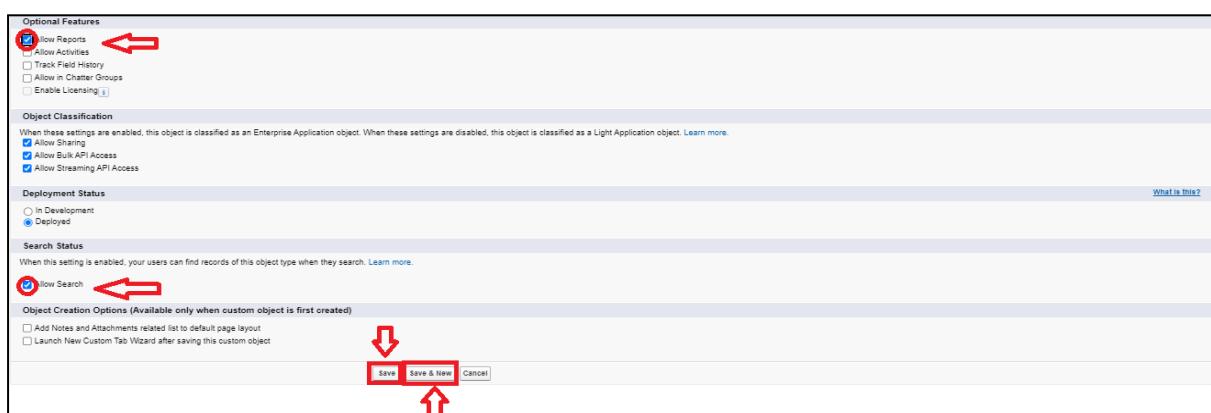


On Custom object defining page:

Enter the label name (lead), plural label name ?(leads), Record name(Customer Name)



Click on Allow reports, Allow search ? Save



Create Object Property

- 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?Property
- 4)Plural label name? Properties
- 5)Record Name?Property Name
- 6)click on Allow reports,
- 7)Allow search ? Save

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.Record Name?Loan Id
- 6.Data Type?Auto Number
- 7.Display Formate?LN-{0000}
- 8.Starting Number?0001
- 9.click on Allow reports,
- 10.Allow search?Save

Tab

What is Tab?

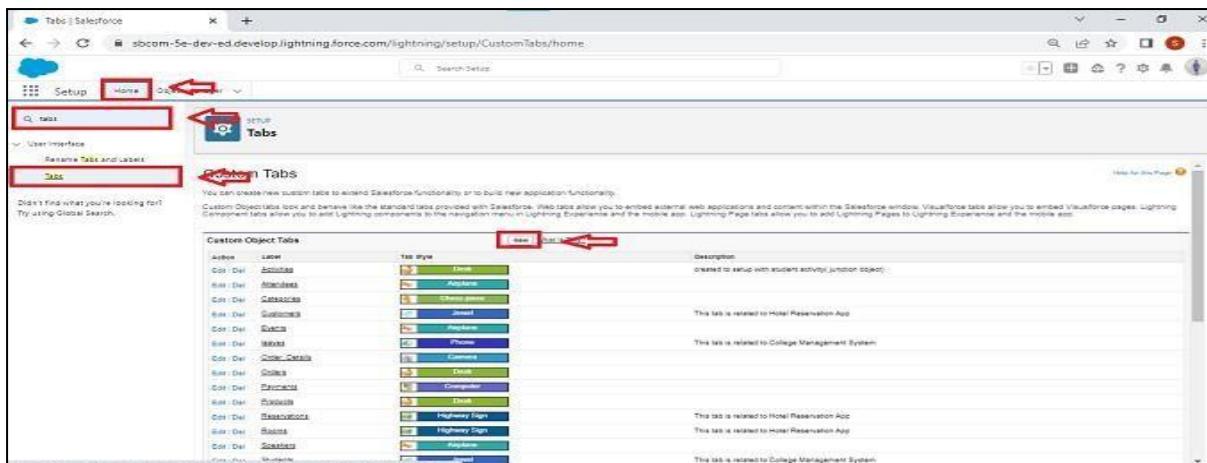
A tab is like a user interface that is used to build records for objects and to view the records in the objects.

- 1.Types of Tab
- 2.Custom object tab
- 3.Web tab
- 4.Visualforce tab

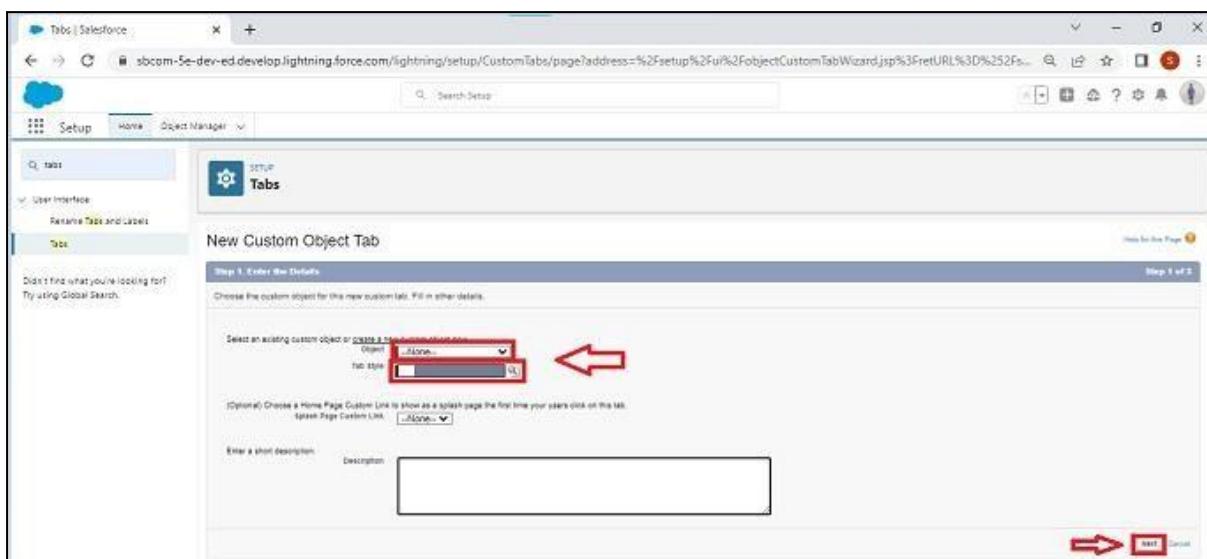
Create The Lightning Tab

Create the Lightning Tab to create a Tab:(enquiries)

Go to setup page ? type Tabs in Quick find bar ? click on tabs ? New (under custom object tab)



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.



Create A Tab (Property,Loan)

To create a Tab:(Property)

- 1) Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)
- 2) Select Object(Property) ? 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

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.

Create the Lightning App

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

The screenshot shows the Salesforce App Manager interface. At the top, there are several navigation links: Setup, Home, Object Manager, and App Manager. A red box highlights the 'App Manager' link. Below these, there's a search bar and a 'Lightning Experience App Manager' section. A red arrow points to the 'Clone (Preview Beta)' button. Another red arrow points to the 'New Lightning App' button, which is located in the top right corner of the main content area. The main content area displays a table of existing apps, with columns for App Name, Developer Name, Description, Last Modified, App Type, and various checkboxes. The table lists 10 apps, including Analytics Studio, App Launcher, and Data Manager.

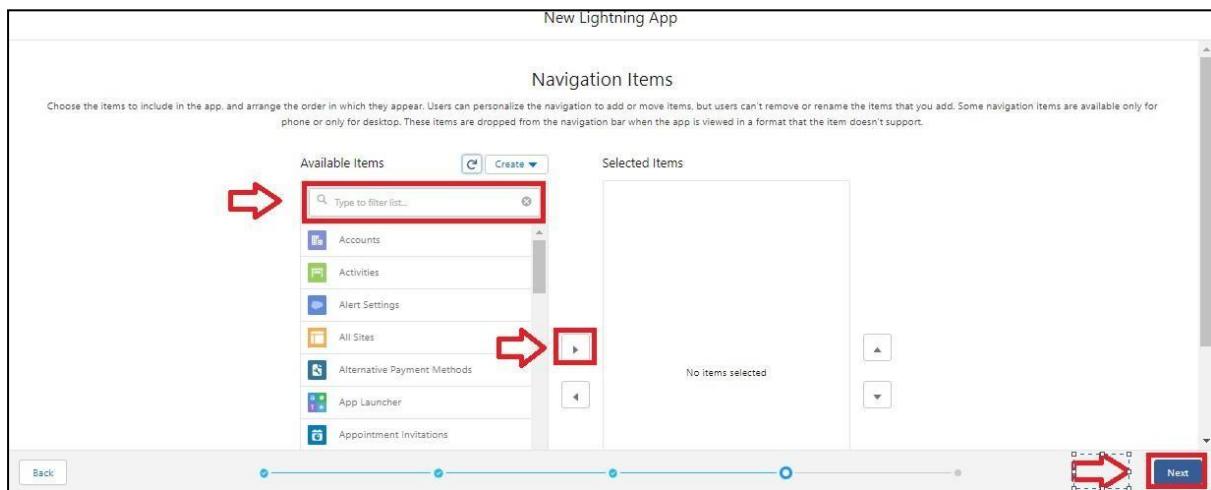
Fill the app name as an Property Management in app details and branding ?Next ? (App option page) keep it as default ? Next

The screenshot shows the 'New Lightning App' configuration page. The first section is 'App Details & Branding'. It includes fields for 'App Name' (with a red arrow pointing to the input field), 'Developer Name' (with a red arrow pointing to the input field), 'Description' (with a red arrow pointing to the input field), 'Image' (with a red arrow pointing to the upload button), and 'Primary Color Hex Value' (with a red arrow pointing to the color picker). Below these is an 'Org Theme Options' checkbox. The bottom of the page features an 'App Launcher Preview' section and a 'Next' button at the bottom right, which is highlighted with a red arrow.

(Utility Items) keep it as default ? Next ? (Add User Profile) Add System Administrator, Salesforce platform user, Standard User ? Next.

To Add Navigation Items:

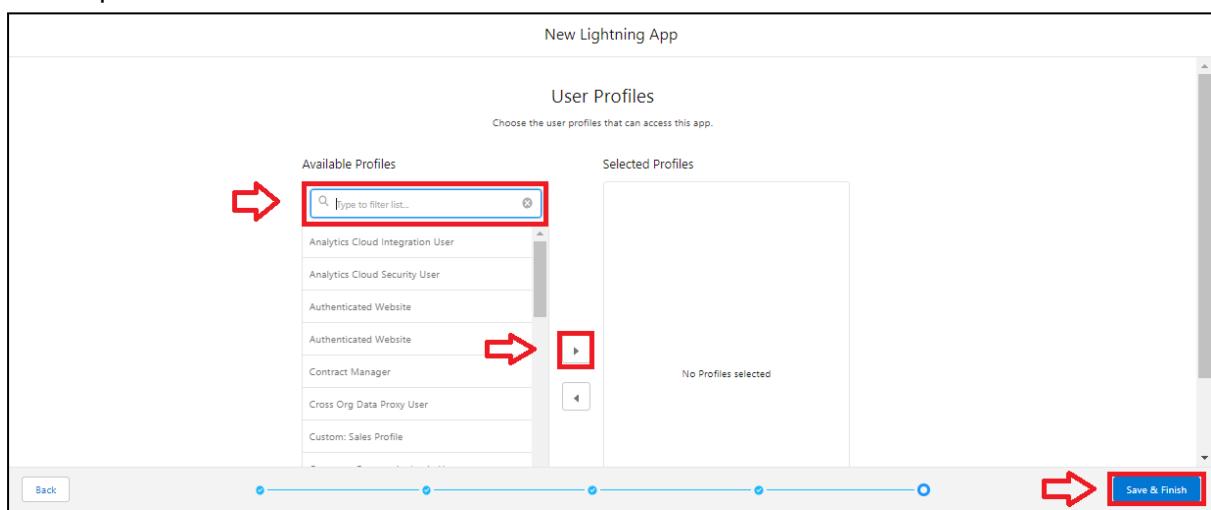
(Lead, Property, Loan, Report, Dashboard) Select the items from the search bar and move it using the arrow button ? Next.



To Add User Profiles:

(System Administrator, Salesforce platform user, Standard User)

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



Create The Lightning App

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

The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'app manager' typed in. Below it, there's a button labeled 'Clone Apps(Beta)'. To the right of the search bar, there's a red arrow pointing to a button labeled 'New Lightning App'. The main area displays a table of existing apps, with one row highlighted.

App Name	Developer Name	Description	Last Modified	App Type
All Tasks	Analytics	Build CRM Analytics dashboards and reports	04/12/2022, 10:13 am	Classic
Analytics Studio	Insights	Build CRM Analytics dashboards and reports	04/12/2022, 10:13 am	Classic
App Launcher	AppLauncher	App Launcher tasks	04/12/2022, 10:13 am	Classic
Bart Solutions	LightningBart	Discover and manage business solutions designed for your industry	04/12/2022, 10:18 am	Lightning
Chatter Desktop	ChatterDesktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	04/12/2022, 4:54 pm	Connected (Managed)
Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed...	04/12/2022, 4:55 pm	Connected (Managed)
College Management System	Nadeem	demo app	04/12/2022, 4:15 pm	Lightning
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes	04/12/2022, 10:13 am	Lightning

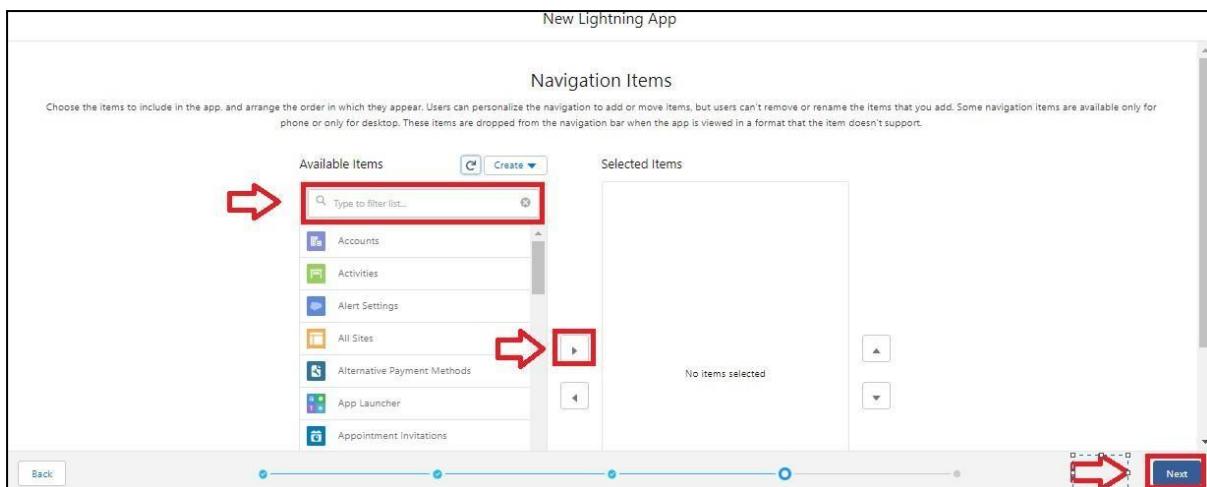
Fill the app name as an Property Management in app details and branding ?Next ? (App option page) keep it as default ? Next

The screenshot shows the 'New Lightning App' configuration page. On the left, there's a section for 'App Details' with a red arrow pointing to the 'App Name' input field, which has 'Name your app...' typed into it. On the right, there's a 'App Branding' section with an 'Image' upload button and a color picker set to '#0070D2'. At the bottom right of the page, there's a red arrow pointing to a 'Next' button.

(Utility Items) keep it as default ? Next ? (Add User Profile) Add System Administrator, Salesforce platform user, Standard User ? Next.

To Add Navigation Items:

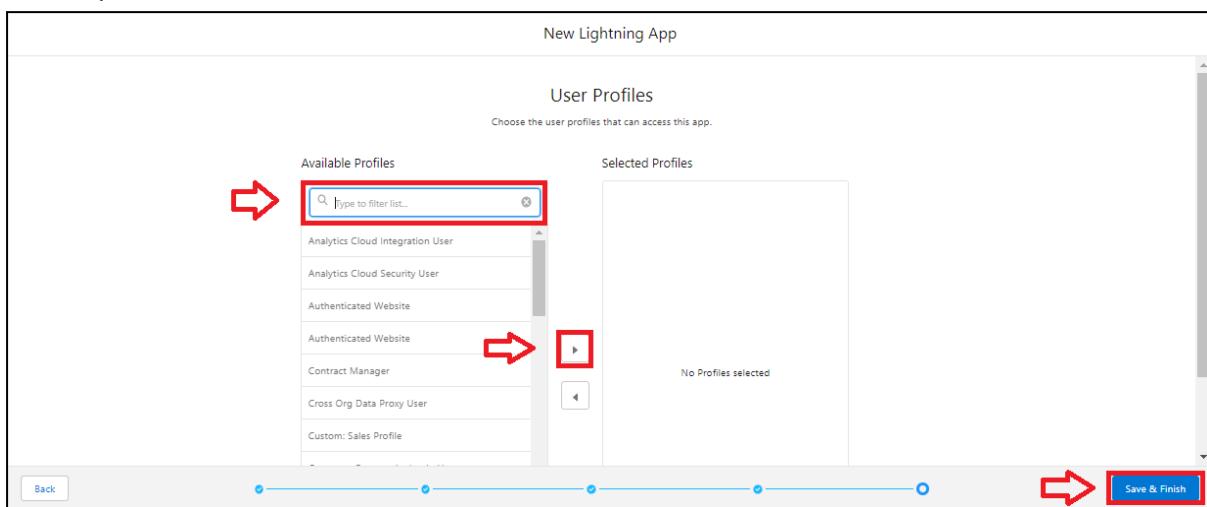
(Lead, Property, Loan, Report, Dashboard) Select the items from the search bar and move it using the arrow button ? Next.



To Add User Profiles:

(System Administrator, Salesforce platform user, Standard User)

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



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.

- 1.Types of Fields
- 2.Standard Fields
- 3.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,

- 1.Created By
- 2.Owner
- 3.Last Modified

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.

Create Fields

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. Step 1 highlights the 'Object Manager' tab in the top navigation bar. Step 2 highlights the search bar containing 'Enquiry'. Step 3 highlights the 'Enquiry' object in the list, which is a Custom Object.

The screenshot shows the Salesforce Object Manager interface after searching for 'Enquiry'. Step 1 highlights the 'Object Manager' tab in the top navigation bar. Step 2 highlights the search bar containing 'Enquiry'. Step 3 highlights the 'Enquiry' row in the list, which is a Custom Object.

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

The screenshot shows the Salesforce Fields & Relationships interface. Step 1 highlights the 'Fields & Relationships' link in the sidebar. Step 2 highlights the 'New' button in the top right corner of the main table area.

Select Datatype (Auto number)

Data Type	
<input type="radio"/> None Selected	Selected one of the data types below.
<input checked="" type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary <small>(1)</small>	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none">• The relationship field is required on all detail records.• The ownership and sharing of a detail record are determined by the master record.• When a user deletes the master record, all detail records are deleted.• You can create rollup summary fields on the master record to summarize the detail records. The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.

3. Fill the field label name Lead Number, Datatype (autonumber) ? Next ? Next ? Save.

The screenshot shows the 'Object Manager' setup screen. A new field is being created with the following details:

- Field Label:** Lead Number (1)
- Display Format:** LN-(0000) (2) - Example: A-(0000) What Is This?
- Starting Number:** 0001 (3)
- Field Name:** Lead_Number (4)
- Description:** (Empty)
- Help Text:** (Empty)

Create the remaining Fields:

Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for Below Fields

Lead Type: Create the picklist fields by the values (Buy, Rent)
 State: Create the Picklist Fields (Maharashtra, Gujarat, Rajasthan)
 City: Create the Picklist Fields (Nashik, Surat, Jaipur)
 Email: Create the Email Select the Data Type as Email (Email)
 Phone: Select the Field Data type as (Phone)

•

Create Picklist Field On Enquiry Object

Create picklist fields on enquiry object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, Select enquiry Object

Now Select Fields and relationships from setup menu of the enquiry object.

1. Click new and select Picklist fields ????next and enter label name(State) and select enter values option((Maharashtra, Gujarat, Rajasthan),next and Save
2. Note: we create picklist fields for city follow the above steps just change the Labels and values.

Field Label: State

Values: Use global picklist value set Enter values, with each value separated by a new line

Maharashtra
Gujarat
Rajasthan

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set

Field Name: Istate

Create Field Dependency(on enquiry objects)

1. Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.
2. The below steps will assist you in creating Field Dependencies.
3. Click on the gear icon and then select Setup.
4. Click on the object manager tab just beside the home tab.
5. After the above steps, Select enquiry Object
6. Now Select Fields and relationships from setup menu of the enquiry object.
7. Click Field Dependencies.
8. Click New.
9. Select State as the Controlling Field and select City as the Dependent Field.
10. Click Continue.
11. Select the appropriate Value in each column by double-clicking them.
12. Maharashtra:i) Nashik
- 13.
14. Click Include Values. And it is also same for Gujarat & Rajasthan with its city.
15. Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.
16. Click Close to close the preview window.
17. Click Save.

SETUP > OBJECT MANAGER
Inquiry

Fields & Relationships
10 Items, Sorted by Field Label

Details New Deleted Fields **Field Dependencies** Set History Tracking

New Field Dependency

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.

- The field that drives filtering is called the "controlling field." Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.
- The field that has its values filtered is called the "dependent field." Custom picklists and multi-select picklists can be dependent fields.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

Controlling Field: State
Dependent Field: City

Legend: Excluded Value (Red), Included Value (Yellow)

Instructions:

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Previous button to test the results.

Click button to include/exclude selected values from the dependent picklist:
Include Values (Red), Exclude Values (Yellow)

State:	Maharashtra	Gujarat	Rajasthan
City:	Mumbai Ahmedabad	Ahmedabad Surat Vadodara	Bikaner Jaipur

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All Go to

Click button to include or exclude selected values from the dependent picklist:
Include Values (Red), Exclude Values (Yellow)

State:	Maharashtra	Gujarat	Rajasthan
City:	Mumbai Ahmedabad	Surat Vadodara	Bikaner Jaipur

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All

Save Cancel Previous

For Property Object

Create the remaining Fields:

Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for Below Fields.

- 1.Customer name (lookup relationship related to Enquiry)
- 2.Create Property Type: (Picklist fields) (Residential, Commercial, Industrial) (Field Dependency)
- 3.Residential: Picklist fields (1BHK, 2BHK, 3BHK) (Field Dependency)
- 4.Commercial: Picklist fields (Shop, Office) (Field Dependency)
- 5.Industrial: Picklist fields (Factory, Mall) (Field Dependency)

Note: In above picklist fields Property type is control field and Residential, Commercial, Industrial is dependent field

- 6.State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
- 7.City:(Take Any City for Field Dependency)

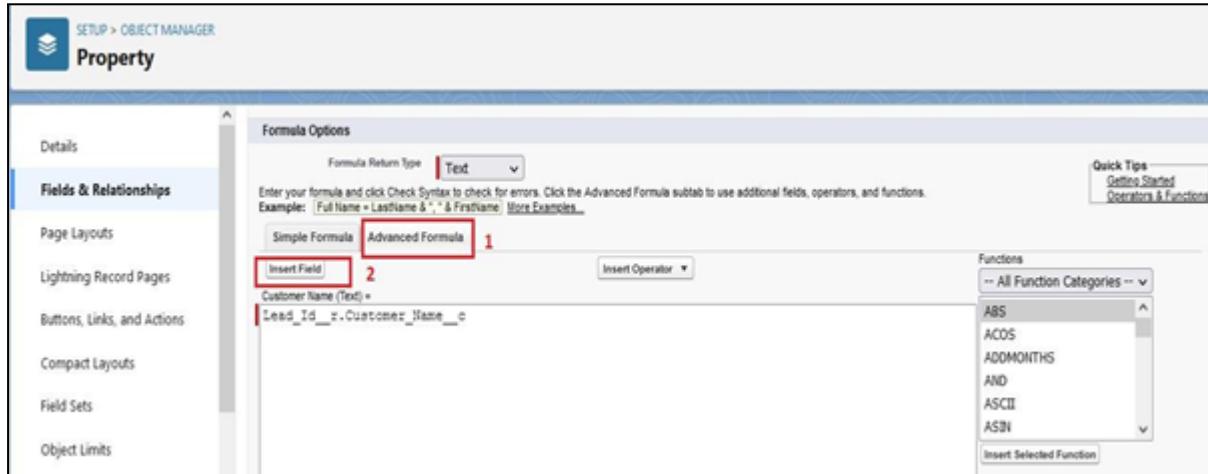
Note: In above picklist fields State is a control fields and city is dependent field

- 8.Discount:(Percentage As the Field Data Type)
- 9.Price: (Number As the Field Data Type)

10. Loan Amount: (Currency As the Field Data Type)

For the Property 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.

Lead_Id r.Customer_Name_c



For Loan Object

Create the remaining Fields:

Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for

Below Fields

1. Property name: (lookup relationship related to property)
2. Customer name: (lookup relationship related to Enquiry)
3. Interest Rate: (Select the Field Data Type As Currency)
4. Term: (Select the Field Data type as Number)
5. Annual Loan: Field create the Number as the field data type
6. Total Loan Installments: (Field create the Number as the field data type)
7. Loan Repayment: (Field create the Number as the field data type)
8. Loan Amount: (Select the Field data type as Formula)

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

Page Layout And Record Type

Page Layout in Salesforce allows us to customize the design and organization of detail and edit pages of records in Salesforce. Page layouts can be used to control the

appearance of fields, related lists, and custom links on standard and custom object detail and edit pages.

Record types in Salesforce allow you to have different business processes, picklist values, and page layouts to different users based on profile.



The screenshot shows the Formula Editor interface. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Advanced Formula" selected. Below the tabs are buttons for "Insert Field" and "Insert Operator". The main area contains a formula string:

```
Loan_Amount (Currency) =  
(Loan_Repayment__c * (((1+ Interest_rate__c / 52) ^ Term__c) -1)) / (( Interest_rate__c / 52) * ((1+ Interest_rate__c / 52) ^ Term__c))
```

At the bottom of the editor, there is a "Check Syntax" button and a status message: "No syntax errors in merge fields or functions. (Compiled size: 274 characters)".

Create Page Layout For Property Object

Create a page layout for Property Object

Go to setup ? click on Object Manager ? type object name in search bar ? click on the object
Now click on “Page Layout” ? New.



The screenshot shows the Salesforce Object Manager. The left sidebar has sections for "Details", "Fields & Relationships", "Page Layouts" (which is highlighted with a red box and has a count of 1), "Lightning Record Pages", "Buttons, Links, and Actions", and "Compact Layouts". The main area is titled "Property" and shows a table for "Page Layouts". The table has columns: "PAGE LAYOUT NAME", "CREATED BY", and "MODIFIED BY". There is one item listed: "Property Layout" created by "Vanshiv Technologies" on 05/04/2023 at 12:13 pm, last modified by "Vanshiv Technologies" on 07/04/2023 at 10:53 pm. A "New" button is located at the top right of the table, also highlighted with a red box. A "Quick Find" search bar is above the table.

We can add or remove the the page layout field with the help of drag and drop

Rent Page Layout

Create another page layout name as (Rent) with the help of above steps of activity 1. And remove the discount and loan amount fields from the rent page layout

Record Type For Property Object

Go to setup ? click on Object Manager ? type object name in search bar ? click on the object
Now click on “Record type ” ? New.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY

Enter the record type label as (Buy) and selective active checkbox next and save

Record Type Rent

Create report type name has Rent with the above steps of activity-3

Page Layout Assignment

1. Go to setup ? click on Object Manager ? type object name in search bar ? click on the object
2. Now click on “page layout ” ? click page layout assignment
3. Select the buy record type and select page layout to use(buy) then click on save.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Buy	05/04/2023, 7:07 pm	05/04/2023, 7:07 pm
Commercial	05/04/2023, 6:56 pm	05/04/2023, 6:56 pm
Industrial	05/04/2023, 6:56 pm	05/04/2023, 6:56 pm
Property Layout	05/04/2023, 12:13 pm	05/04/2023, 4:03 pm

Page Layout Assignment For Rent

Follow above 1 to 3 steps

We assign rent page layout for rent record type.

Profile

1. A profile is a group/collection of settings and permissions that define what a user can do in salesforce.
2. 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.
3. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

Standard profiles:

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

Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

Create A New Profile

To create a new profile:

Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (standard user is preferable).

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Sales Manager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	School.profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

Enter a Profile Name(Sales Manager) And click on Save

Setup Home Object Manager

Q profile

Users Profiles

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

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	User License
Standard Platform User	Salesforce Platform
Profile Name	<input type="text"/> 1

2

Help for this Page

Click on the new created profile

Profiles

All Profiles | Edit | Delete | Create | New View

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Sales Manager 1	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Marketing Manager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Administrators	Salesforce	<input checked="" type="checkbox"/>

1 of 3 0 Selected

Help for this Page

While still on the profile page, then click Edit.

Setup Home Object Manager

Q profile

Users Profiles

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

Profiles

Sales Manager

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

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

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

Profile Detail	
Name	Sales Manager
User License	Salesforce
Description	

1

Custom Profile

Help for this Page

Scroll down to Custom Object Permissions and Give view all access permissions for Lead, Property, Loan and save(Sales Manager also Having Create, Edit, Delete for Lead, property, loan objects)

	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
Buyers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Drivers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Leads	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Loans	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Parents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Properties		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Rents		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Schools		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Students		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Vehicles		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

6.Create Remaining Profiles

Follow the Above Steps to create the Profile just change the Name for below profiles Clone profile (Standard Platform User) for below all profiles

- (a). Marketing Executive profile (b). Marketing Manager profile

Create Marketing Executive Profile

Create Marketing Executive Profile

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

Create Sales Executive Profile

Activity3- Create Sales Executive Profile:

Follow the Above Steps to create the Profile just change the Name for Below profiles clone profile (StandardPlatform User) ,profile name (Sales executive profile). And assign a sales rep1 permission set
For Sales Rep1? Read, Create, Edit for lead, property and loan objects. For Sales Rep3? Read only.

Note: above 2 are permission set and assign a permission set according to user need. We will discuss in next milestone.

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.

NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user who has salesforce license Or change the license type from Salesforce to any other.

Create User

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

The screenshot shows the Salesforce Setup interface with the URL sbcom-5e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home. The left sidebar includes links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings (with 'Users' selected), Feature Settings, Data.com, and Prospector. The main area is titled 'All Users' and contains a table with columns: Active, Full Name, Alias, Username, Role, Active, and Profile. A red box highlights the 'New User' button in the top right of the table header. Another red box highlights the 'Users' link in the left sidebar under 'User Management Settings'. A third red box highlights the 'Users' quick find search bar in the top left.

First Name: Sunny

Last Name: Gupta

Alias: Sanj

Email: provide your personal email id for future reference

Username: sunnygupta@thesmartbridge.com

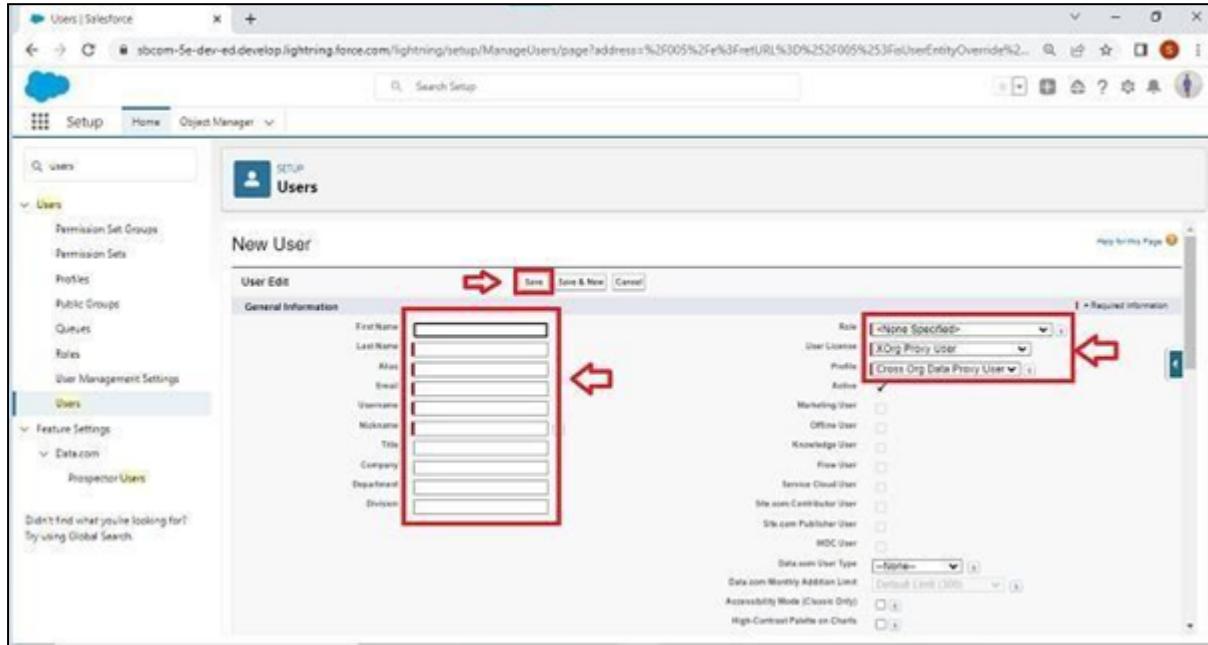
Nickname: Sunny

Role: leave it as default

User License: Salesforce

Profile: Sales Manager and Click Save Button.

Note: Assign Profile according to user requirement.

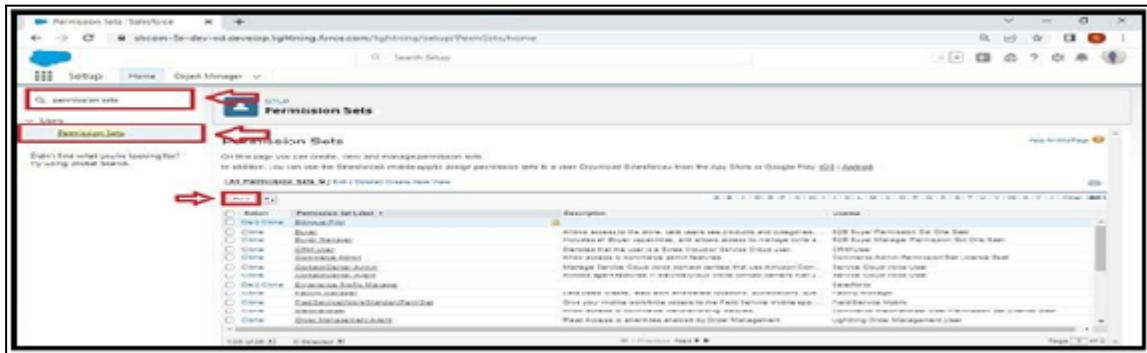


Permission Set

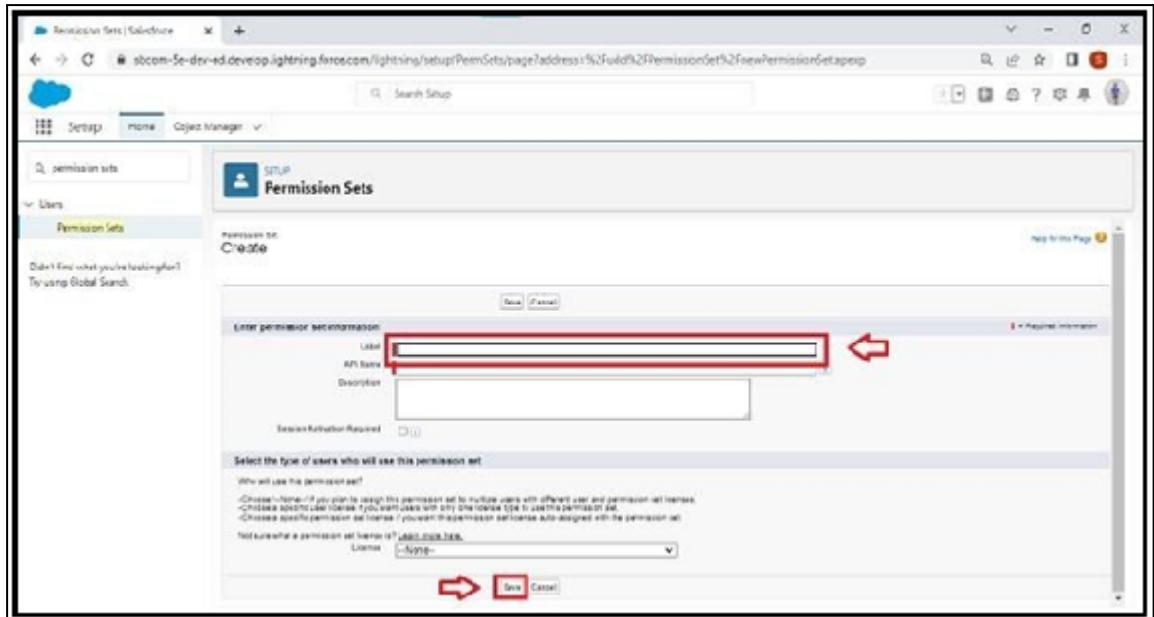
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission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

Create Permission Set

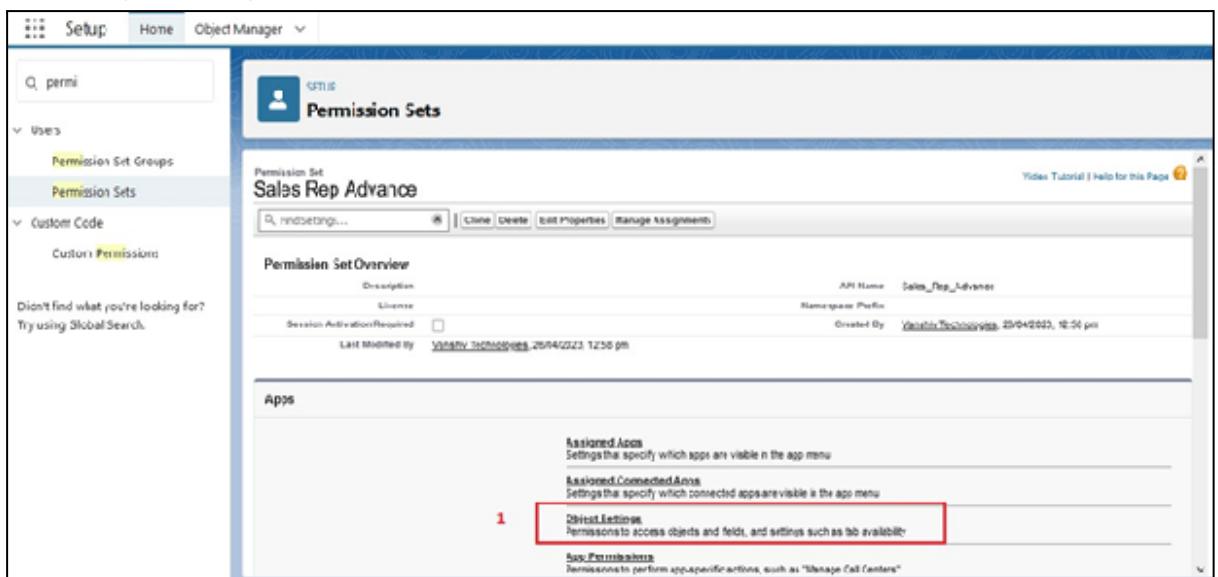
1. Go to setup ? type “permission sets” in quick search ? select permission sets ? New



2. Enter the label name (Sales Rep Advance) ? save



3. Select Object settings



4. Search object property and select property object. and click Edit button

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. In the left sidebar, 'Custom Permissions' is expanded, and 'Properties' is selected. The main area displays a permission set named 'Sales Rep Advance'. A red box highlights the search bar with 'Q: prop'. Another red box highlights the 'Properties' section under 'Object Settings'. At the top right of the main area, there is an 'Edit Properties' button.

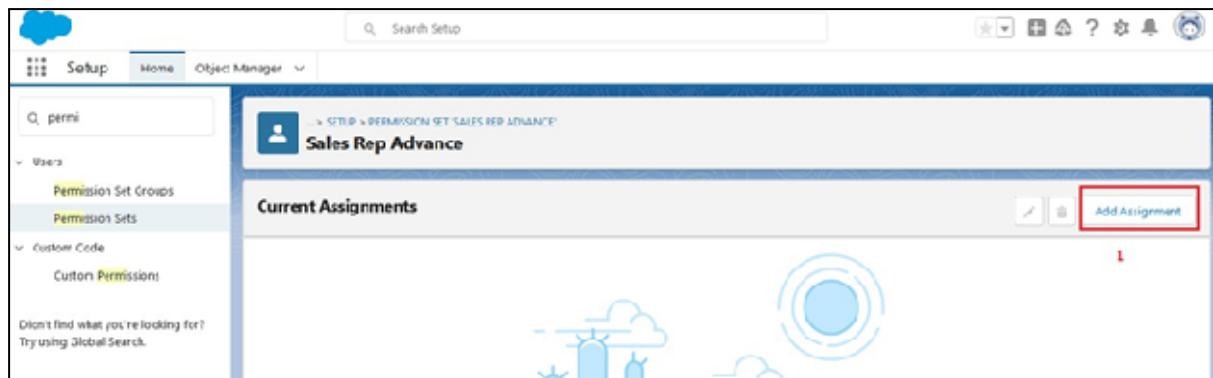
5. In Object Permission we give View all permission. And click save button

The screenshot shows the 'Permission Sets' page with the 'Object Permissions' section highlighted by a red box. This section contains checkboxes for 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All'. An arrow points from the 'View All' checkbox towards the bottom right of the screen.

6. Repeat 4th and 5th steps for Enquiry and Loan objects.
7. After saving the permission click on the Manage assignment

The screenshot shows the 'Permission Sets' page with the 'Manage Assignments' button highlighted by a red box at the top right of the main content area.

8. Now click on the Add Assignment



9. Now select the user (sunny) and click on next & assign.

Full Name	Title	Phone	Email
Sanjay Gupta		[REDACTED]	[REDACTED]
Technologies		[REDACTED]	[REDACTED]
sunny		[REDACTED]	[REDACTED]
Teacher		[REDACTED]	[REDACTED]
User 2	sunny	[REDACTED]	[REDACTED]

Set Up 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-

1. Public Read/Write/Transfer (only available of Leads and Cases)
2. Public Read/Write
3. Public Read/Only
4. Private

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 Enquiry, Property custom object

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The 'Organization-Wide Defaults' section is selected. It lists various objects with their internal and external access settings. A column for 'Grant Access Using Hierarchies' is shown, with most checkboxes checked except for 'Lead' and 'User'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contact	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Case	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Campaign	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>

5. Click Edit and from the Drop Down select private for internal and external
6. This Setting is for all the User Which have been Created

The screenshot shows the 'Edit Work Type Group' page. Under 'Work Type Group', there are three entries: 'Lead', 'Rent', and 'Other Settings'. Each entry has a dropdown for 'Internal Access' and 'External Access', both of which are set to 'Private'. There are also checkboxes for 'Grant Access Using Hierarchies' next to each entry, which are checked for 'Lead' and 'Rent'. At the bottom, there are 'Save' and 'Cancel' buttons.

User Adoption

Create A Record(Enquiry)

1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.

- Click new and fill details & Save

The top screenshot shows the Salesforce Object Manager screen. Step 1 highlights the 'Object Manager' button. Step 2 highlights the search bar with 'proj'. Step 3 highlights the 'Property Management Application' item in the list.

The bottom screenshot shows the 'Enquiries' tab in the 'Property Management Application' screen. Step 1 highlights the 'Enquiries' tab. Step 2 highlights the 'New' button. The form contains the following data:

Field	Value
Customer Name	sunny
Lead Type	Buy
Phone	090909090
Email	sunny@gmail.com
State	Rajasthan
City	Jaipur

The 'Save' button at the bottom right of the form is highlighted with a red box.

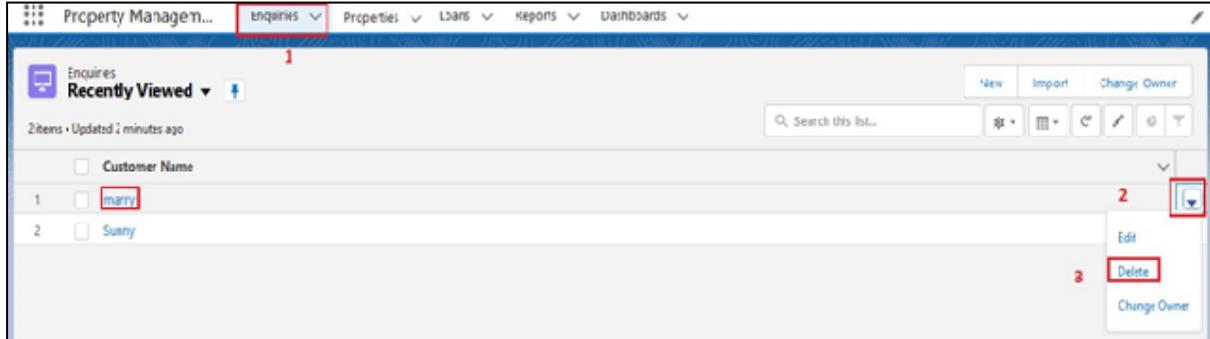
View A Record(Enquiry)

- Click on App Launcher on left side of screen.
- Search Property Management & click on it.
- Click on Inquiries Tab.
- Click on any record name. you can see the details of the Event

The screenshot shows the 'Enquiries' tab in the 'Property Management Application' screen. A record named 'marry' is selected, indicated by a red box around its name. The 'Save' button at the bottom right of the screen is highlighted with a red box.

Delete A Record(Enquiry)

1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



Report

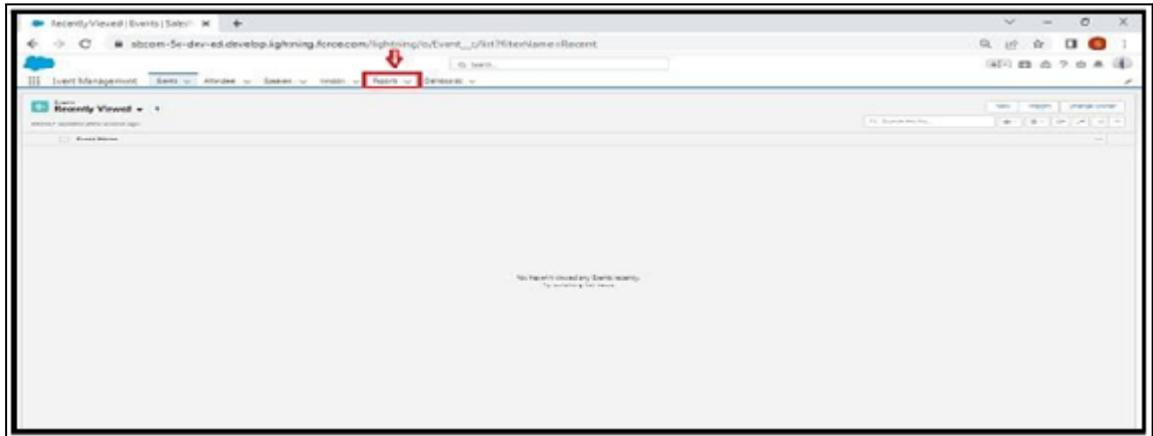
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

- Tabular
- Summary
- Matrix
- Joined Reports

Create Report

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



2. Click New Report

The screenshot shows the Salesforce Reports page. At the top, there's a search bar and a 'New Report' button highlighted with a red box and an arrow pointing to it. Below the header, there's a sidebar with various report categories like Recent, Standard, and Custom Reports. The main area displays a table of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribers. One specific report titled 'New Supplier Report' is highlighted with a red box.

Dashboards

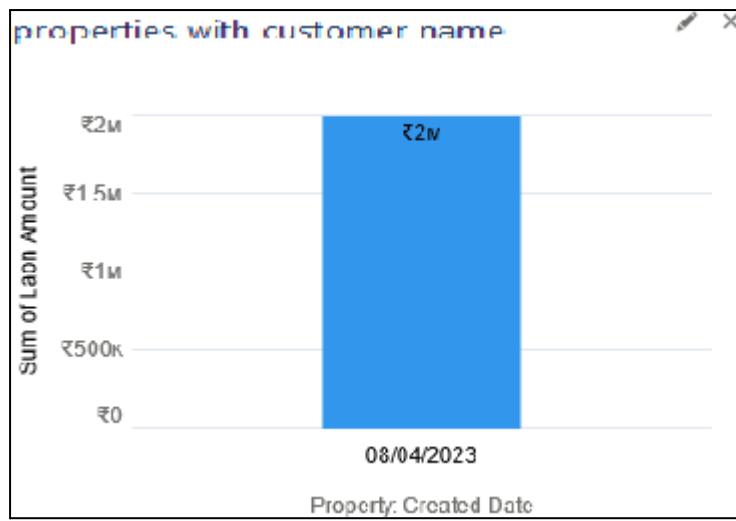
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Create Dashboards

- 1.Click the Dashboards tab.
- 2.Click New Dashboard.
- 3.Name the Properties with Customer Name Report and click Create.
- 4.Click +Component.
- 5.Select the Properties with Customer Name Report and click Select

The screenshot shows the 'Select Report' dialog box. On the left, there's a sidebar with sections for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports) and Folders (Created by Me). The main area has a search bar with 'pro' typed into it, a results count of '2 results', and a list of two reports: 'properties with customer name' by Vaishv Technologies and another 'property with customer name' by the same user. At the bottom right, there are 'Cancel' and 'Select' buttons, with the 'Select' button highlighted with a red box.

- 6.Select the Vertical Bar Chart component(select in which format you want display chart and click Add).
- 7.Click Save and then Done.



Create Dashboards

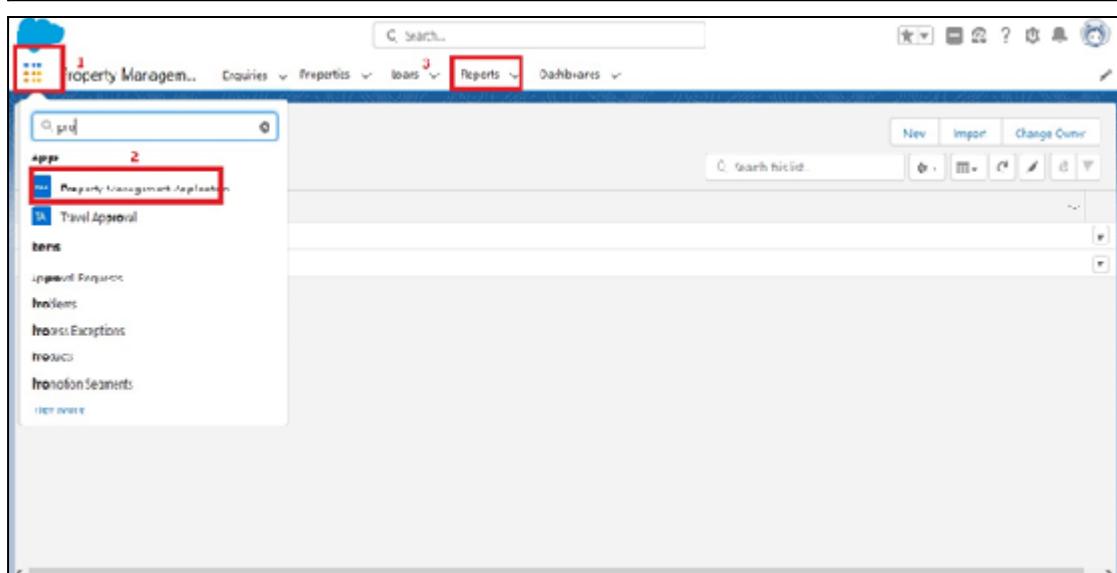
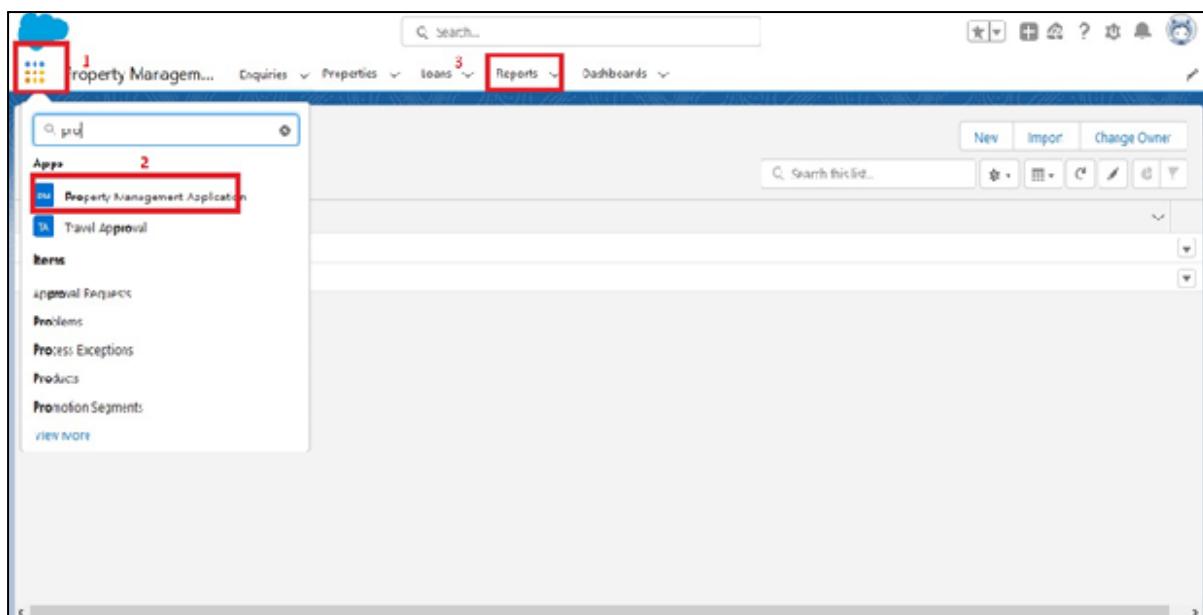
Follow the above steps

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

View Report And Dashboard

Report

1. Click on App Launcher on left side of screen
2. Search property management & click on it.
3. Click on Reports Tab.
4. Click on Properties with Customer Name & see records



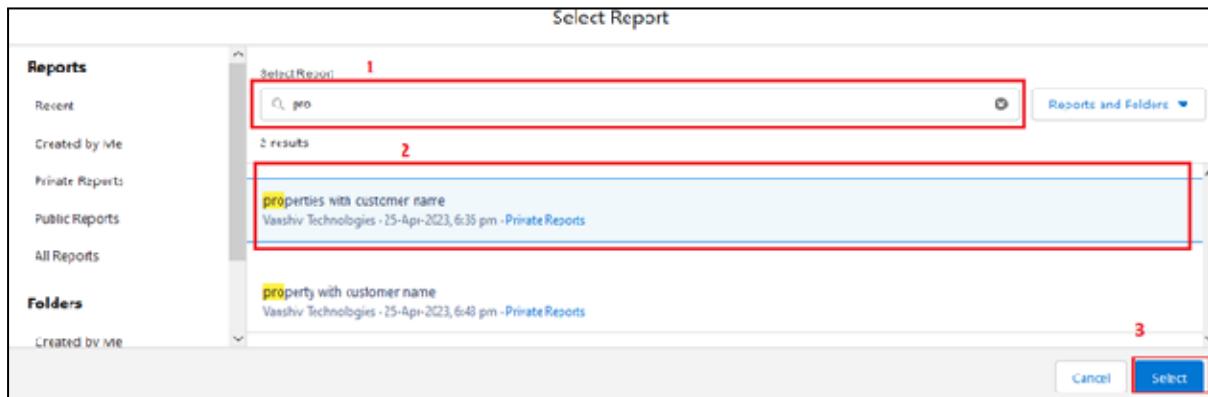
Report: Properties with Customer Name							
Total Records	Total Loan Amount						
2	₹20,00,000						
Property: Created Date ↑	Property: Property Name ↴	Customer Name: Customer Name ↴	City ↴	Property Type ↴	Commercial ↴	Residential ↴	Loan Amount ↴
16/04/2023 (2)	GuruGiga	Surya	Jenpur	Residential	-	2 Bhk	₹10,00,000
	Mahima group	Surya	Nishik	Commercial	Shop	-	-
Subtotal							₹20,00,000
Total (2)							₹20,00,000

Dashboard

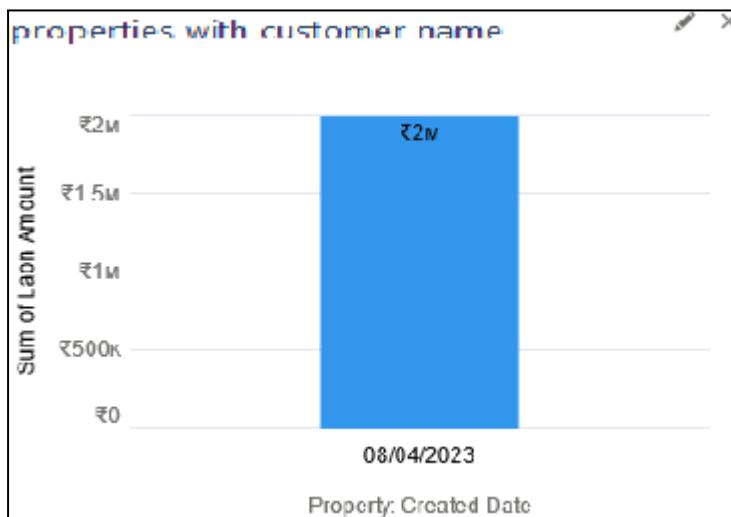
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

View Dashboard

- 1.Click the Dashboards tab.
- 2.Click New Dashboard.
- 3.Name the Properties with Customer Name Report and click Create.
- 4.Click +Component.
- 5.Select the Properties with Customer Name Report and click Select



- 6.Select the Vertical Bar Chart component(select in which format you want display chart and click Add).
- 7.Click Save and then Done.



Flow Builder

Flows In Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows.

Flow Builder can be used to build code-like logic without using a programming language. Flows fall into five categories:

- Screen Flows
- Schedule-Triggered Flows
- Autolaunched Flows
- Record-Triggered Flows
- Platform Event-Triggered Flows

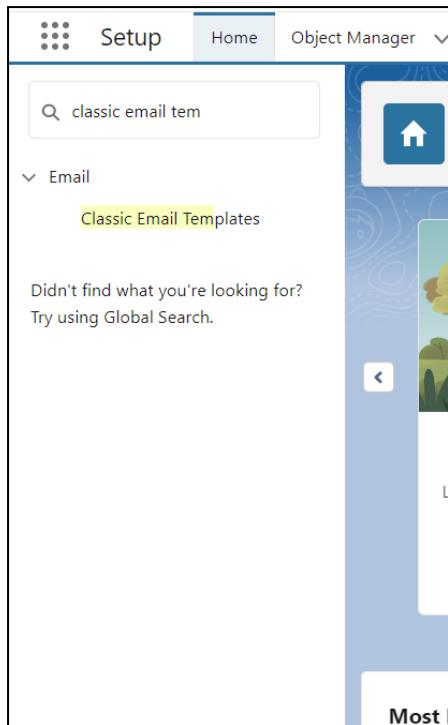
Classic Email Template

Classic Email Template

Note: For creating this flow you have to create the Due date for Loan Payment field in the loan object with date and time field data type

Go to the Gear Icon?Click on the home button and Search for the Classic Email Template

?Click on the New Template? name?oan Amount Pay Reminder



Author as the System admin user?give Description?Reminder Calls through emails

The screenshot shows the 'Classic Email Templates' section in Salesforce. A new email template is being created with the following details:

- Email Template Detail:**
 - Template Name: Loan Amount pay Reminder
 - Template Unique Name: Loan_Amount_pay_Reminder
 - Encoding: Unicode (UTF-8)
 - Author: Shivam Upadhye [Change]
 - Description: Sending the mail to the user for the reminder call to pay the loan amount
 - Created By: Shivam Upadhye, 25/04/2023, 10:01 pm
 - Available For Use: ✓
 - Last Used Date: Times Used
 - Modified By: Shivam Upadhye, 25/04/2023, 10:06 pm
- Email Template Preview:**
 - Subject:** Reminder for Payment 5 days before
 - Plain Text Preview:**

```
Hello {!Loan__c.Owner.FirstName}.
```

It is the reminder mail for you that your due date is closer please pay the amount on time.

Thanks and Regards,
Shivam.

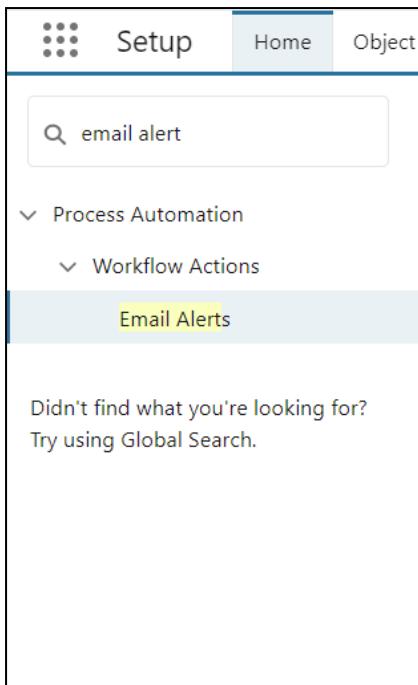
Clone that Email Template and follow the steps which is mentioned above and give the following names you have to clone it multiple times that template

1. Loan Amount pay Reminder for 24 hrs
2. Overdue by one day

Create The Email Alerts

Click on the home button and search for the Email Alerts ---> There Click on the New Email alerts

--->and give the name as Email For the 24 hrs before---> select the email template which you have created for the 24 hrs before



There Click on the New Email alerts----> and give the name as Email For the 24 hrs before

---->select the email template which you have created for the 24 hrs before and recipient
for all condition is owner

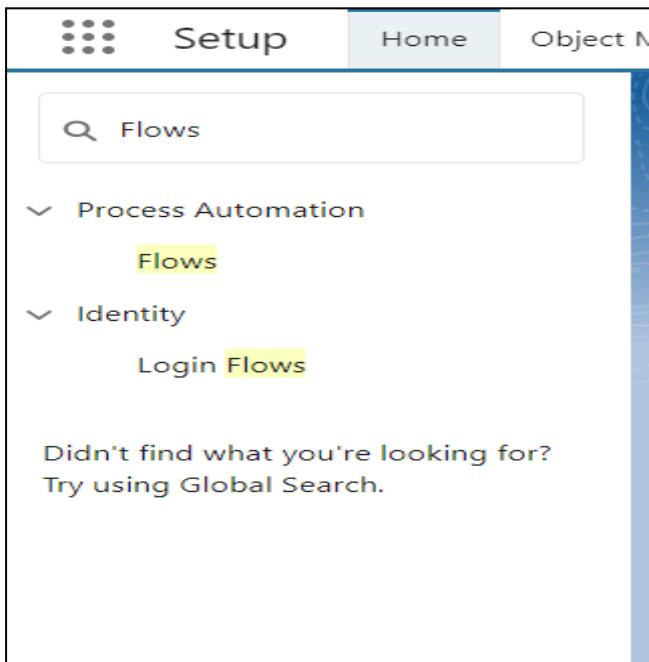
The screenshot shows the 'Edit Email Alert' dialog box. At the top, it says 'Edit Email Alert' and 'Email for the 24 hrs before'. Below that is a note: 'Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.' There are three buttons at the top right: 'Save', 'Save & New', and 'Cancel'. A note at the bottom right says 'I = Required Information'. The main form has fields for 'Description' (Email for the 24 hrs before), 'Unique Name' (Email_for_the_24hrs_prior), 'Object' (Loan), 'Email Template' (Loan Amount pay Reminder), and 'Protected Component' (unchecked). Below these, there's a 'Recipient Type' dropdown set to 'User'. Under 'Recipients', there are two sections: 'Available Recipients' (listing 'User: Integration User', 'User: Security User', and 'User: Shivam Upadhye') and 'Selected Recipients' (listing 'Loan Owner'). Between them are 'Add' and 'Remove' buttons.

Follow the Above steps and create the Following Email Alert by cloning with the Similar steps

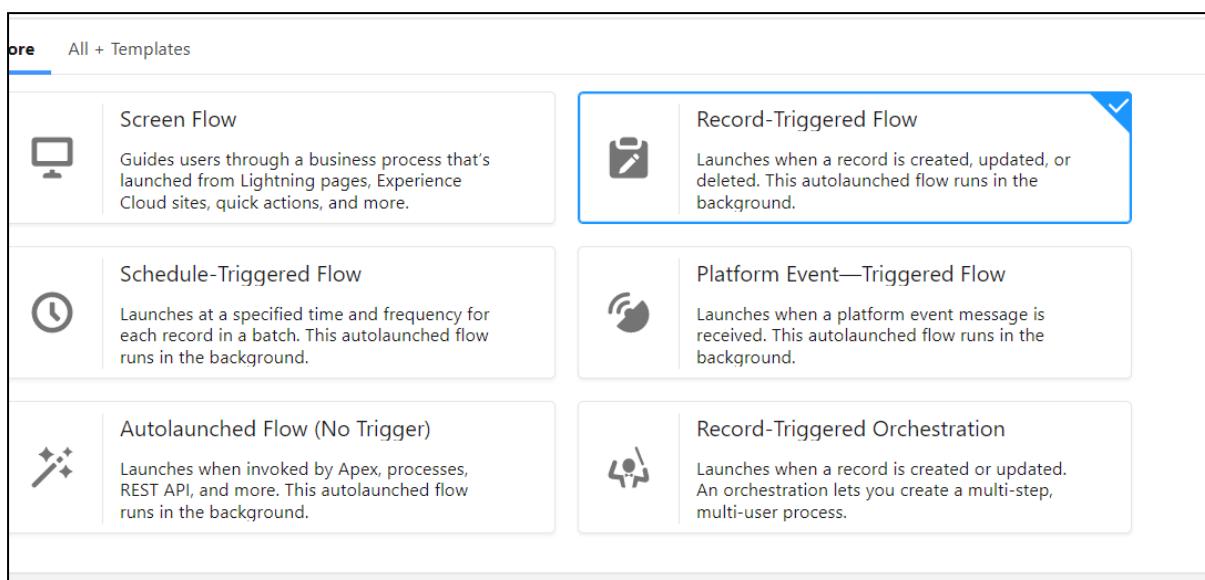
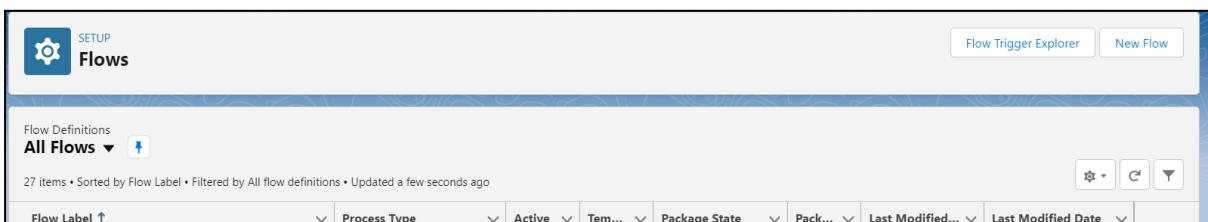
1. Loan Amount Pay Reminder(Cloned Email Alert)
2. Overdue by one day(Cloned Email Alert)
3. Overdue(Cloned Email Alert)

Create The Flows

- Go to the Home Button and search for the flow



- Click on the New Flow---->Click on the Record Trigger Flow



- Select the loan__c object----> Trigger the Flow When----> A Record is created or updated

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object
Loan

Configure Trigger

* Trigger the Flow When:
 A record is created
 A record is updated
 A record is created or updated
 A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

Cancel Done

- Condition Requirement? All Conditions are met (AND) ----> Field---->Due Date For the Loan Payment Operator as --->is Null value False

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
All Conditions Are Met (AND)

Field	Operator	Value
Due_Date__For_Loan_Payment__c	Is Null	False

+ Add Condition

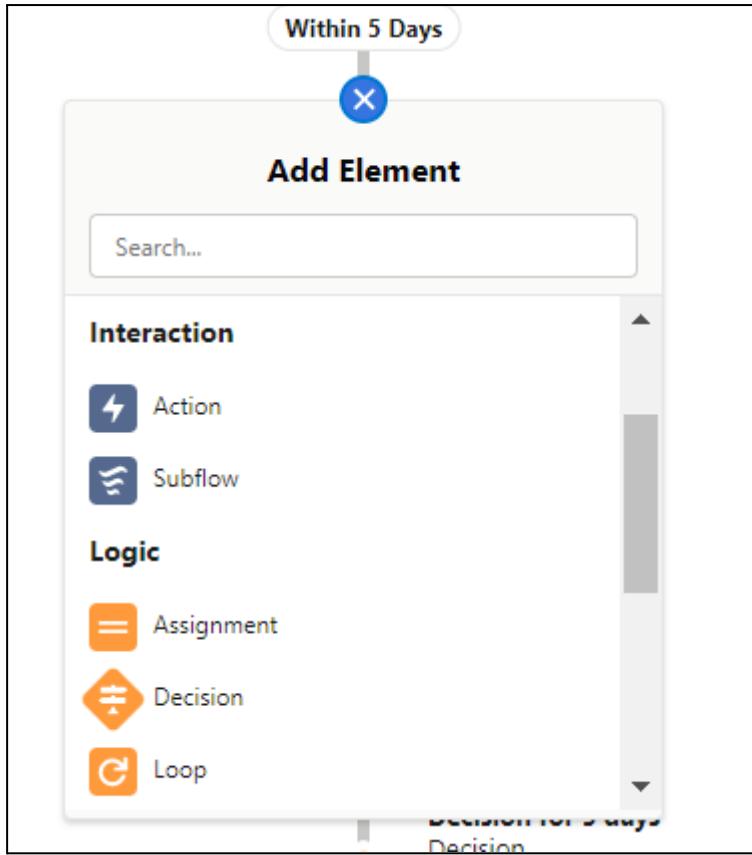
When to Run the Flow for Updated Records ⓘ
 Every time a record is updated and meets the condition requirements
 Only when a record is updated to meet the condition requirements

* Optimize the Flow for:

- Click on the Schedule path----> Path Label as---->within 1 Day----> API Name within_1_day?
 Time Source? Loan__c:Due Date Loan payment ---> Offset number 24----> offset option

Decision Element

- Than There is Decision for the just click on add----> select the Decision--->order outcome--->here are two outcome 1. Send Email 2. don't send the email



Edit Decision

Send Email (Send_Email)

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	+	OUTCOME DETAILS
Don't send email		* Label Send Email
Send Email		



No conditions needed
If no outcome's conditions are met, the flow takes this path.

Cancel Done

- On the outcome is there is the condition for that label don the send email ----> condition Requirement All Conditions are met (AND) ? Operator less than 1

Edit Decision

Send Email (Send_Email)

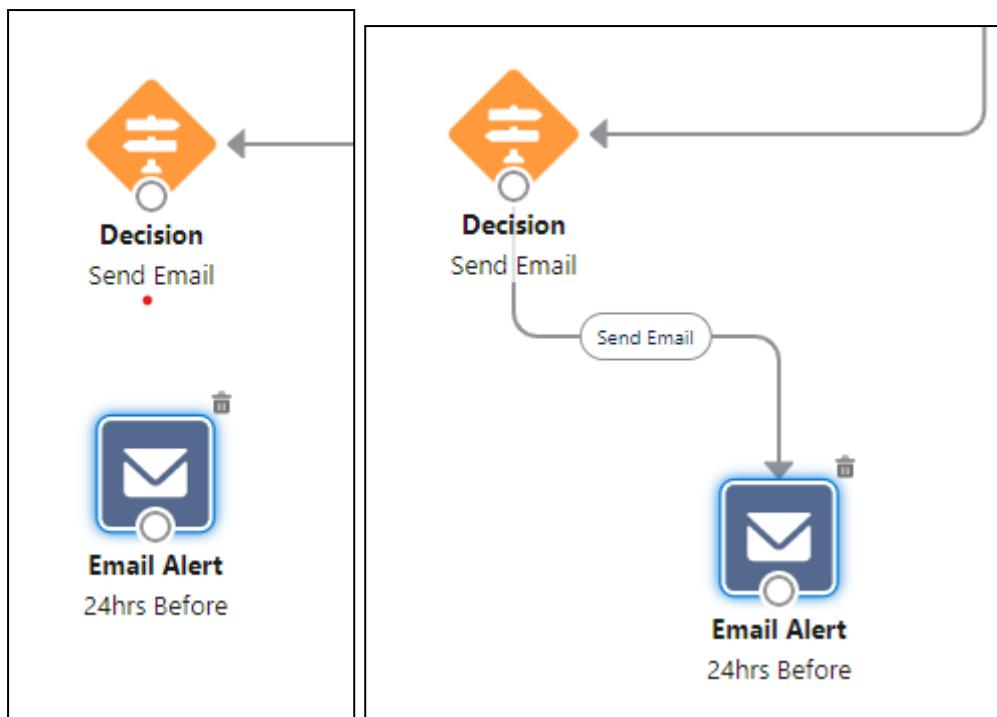
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS
Send Email	* Label: Dont send email * Outcome API Name: Dont_send_email Condition Requirements to Execute Outcome: All Conditions Are Met (AND) Resource: # DaysdueFromCreatedDate X, Operator: Less Than, Value: 1 + Add Condition
When to Execute Outcome: <input checked="" type="radio"/> If the condition requirements are met <input type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements	

[Cancel](#) [Done](#)

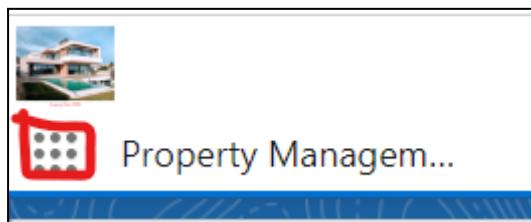
- Follow the same steps for the Following
- On the outcome is there is the condition for that label done the send the email---> condition Requirement All Conditions are met (AND) ----> Operator less than 5
- On the outcome is there is the condition for that label Dont send email for this ----> condition Requirement All Conditions are met (AND) ----> Operator Greater than 0
- On the outcome is there is the condition for that label Dont Send the Email for this ----> condition Requirement All Conditions are met (AND) ----> Operator Greater than 1

1. Go to the layouts change the auto layout with the free for delete both the thread for each decision and create one new connection thread similarly do for all threads and come back to auto layout



Create The Record To Test The Flow

Go to the App Launcher and select the property management application than Go to the Loan Object create one record with the following values Go to you personal email you will get the mail for the selected date



The screenshot shows a software interface for property management. At the top, there is a navigation bar with links for Home, Properties, Leads, Loans, and Recently Viewed/Accounts. A search bar is also present. Below the navigation bar, the title "Loan LN-0002" is displayed. The main content area is titled "Details" and contains the following information:

Field	Value
Loan Name	LN-0002
Interest Rate	₹10,000
Term	10
Annual Loan	2,00,000
Total Loan Installment	15
Loan Repayment	6,01,414
Loan Amount	₹3,127.35
Property Name	Shivam
Customer Name	jonny
Due Date For Loan Payment	01/05/2023
Date Reminder	1
Created By	Shivam Upadhye , 27/04/2023, 11:33 am
Owner	Shivam Upadhye
Last Modified By	Shivam Upadhye , 27/04/2023, 11:33 am

The screenshot shows an email message with the subject "Reminder for Payment 24hrs before". The message is from "Shivam Upadhye via d1wnl5g0g3ry2w-rjfbeat.ap16.bnc.salesforce.com" to "jonny@xyz.com". The content of the email is as follows:

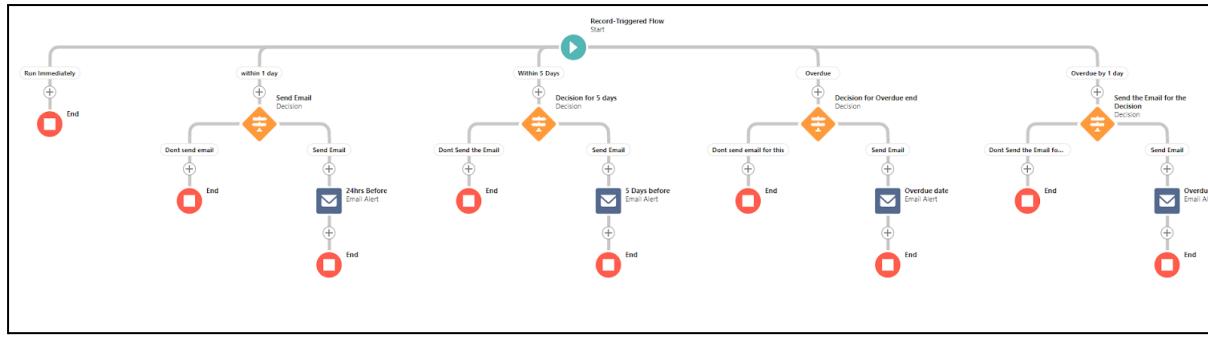
Hello Shivam,

It is the reminder mail for you that your due date is about to complete with 24hrs please pay the amount on time.

Thanks and Regards,
Shivam.

At the bottom of the email, there are two buttons: "Reply" and "Forward".

Here you can see the mail for the 24 hrs before the condition is like duedate - created for the remaining days so it will trigger the email accordingly



Apex Triggers

Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions

before or after changes to Salesforce records, such as insertions, updates, or deletions.

A trigger is Apex code that executes before or after the following types of operations:

- insert
- update
- delete
- merge
- upsert
- undelete

For example, you can have a trigger run before an object's records are inserted into the database,

after records have been deleted, or even after a record is restored from the Recycle Bin.

You can define triggers for top-level standard objects that support triggers, such as a Contact

or an Account, some standard child objects, such as a CaseComment, and custom objects. To

define a trigger, from the object management settings for the object whose triggers you want

to access, go to Triggers.

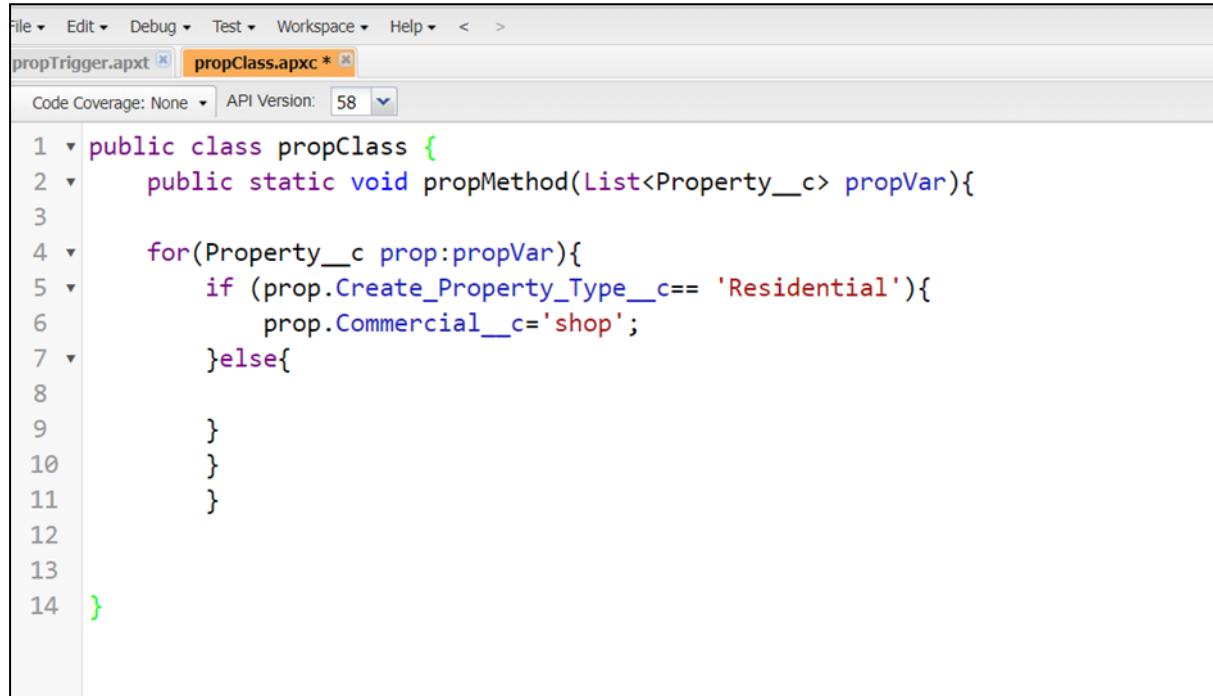
Use Case: When We Are Changing the property type form "Commercial" to "Residential" the

Than commercial field should with "Shop"

Trigger

Use Case: Apex Trigger is Related to Property Object in that there is the field “Create Property Type” which is having the picklist values in that field(Residential, Commercial, Industrial) the condition is like if we select the Create Property type as “Residential” than there is Commercial field so it should get populated with “Shop”

Apex Class:



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾ >
propTrigger.apxt [ ] propClass.apxc * [ ]
Code Coverage: None ▾ API Version: 58 ▾
1 public class propClass {
2     public static void propMethod(List<Property__c> propVar){
3
4         for(Property__c prop:propVar){
5             if (prop.Create_Property_Type__c=='Residential'){
6                 prop.Commercial__c='shop';
7             }else{
8
9             }
10            }
11        }
12    }
13 }
14 }
```

```
public static void propMethod(List<Property__c> propVar){
```

```
public class propClass {
    for(Property__c prop:propVar){
        if (prop.Create_Property_Type__c=='Residential'){
            prop.Commercial__c='shop';
        }else{
        }
    }
}
```

```
}
```

```
trigger propTrigger on Property__c (before update) {
    if(trigger.isUpdate){
        if(trigger.isBefore){
            propClass.propMethod(trigger.new);
        }
    }
}
```

```
trigger propTrigger on Property__c (before update) {
    if(trigger.isUpdate){
        if(trigger.isBefore){
            propClass.propMethod(trigger.new);
        }
    }
}
```

- Just Go to the Property Object and Check Whether Your Trigger Is Working or not as per the requirement