

GOVERNMENT ARTS COLLEGE FOR WOMEN

SALEM-8

DEPARTMENT OF MATHEMATICS

TEAM ID: NM2023TMID11496

Team Lead- S.Aajera Banu

NM ID: A9916DC90088E06A266410C462F561F3

Team Member 1-A. Thangam Swetha

NM ID:D4522500F8B36B6B98C43ED645B444E9

Team Member 2-S.Asifa

NM ID:DD5238077DD0684854940EB27CED9299

Team Member 2-S.Bhuvaneshwari

NM ID:9EID21390B6046C803842F5FF476D2CB



Edit with WPS Office

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION:

1.1. OVERVIEW:

Property Management enables the realty managers to keep tract of crucial data about financial and household properties incorporating associated cash flow, Primary tenants and occupancy sales.

Since there is no off the shelf solution offered directly by salesforce for property management.

1.2 PURPOSE:

Real estate companies use salesforce for property management of this cloud based property management software manager can automate collaboration with tenants nuture these relationships and track essential information about properties in both residential and commercial real estate verticals.

- ❖ Leverage real time reports and dashboards,
- ❖ Simplify document management and data sharing,
- ❖ Integrate a website with a customer portal to



Edit with WPS Office

allow for requests, client profile, account statement etc....,

- ❖ Automate conditional and clients approvals and workflow.

2. PROBLEM DEFINITION AND ESIGN THINKING

2.1 EMPATHY MAP



Edit with WPS Office

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.

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

- Who will benefit from this project?
- why should I do this project?
- what kind of schedule do you anticipate?

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

- what kind of skill does this improve me?
- can it generate spontaneous business?
- will you get employment abroad through this?

See
What behavior have we observed? What can we imagine others doing?

- we can make many project like this
- marketing properties
- job offers

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

- nervous
- better
- interesting

Share template feedback

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



Edit with WPS Office

2.2 IDEATION & BRAINSTORMING MAP

This screenshot shows a digital workspace for a team ideation session. The interface includes a top navigation bar with icons for 'Draw', 'Read aloud', and a search function. The main area is divided into six vertical panels, each containing a different step or tool for the process.

- Before you collaborate:** A brief introduction to the session.
- Define your problem statement:** A template for defining the problem statement.
- Ideation:** A grid-based ideation tool where users can add ideas. Categories include 'Business', 'Challenges', 'Goals', and 'Unknown'. Below the grid are four columns labeled 'Annotate', 'React', 'React', and 'React'.
- Group Ideas:** A section for organizing ideas into groups. It shows a hierarchical tree structure with categories like 'Management of business', 'Innovation of property management', 'Smart property', and 'Imposing management'.
- Prioritize:** A matrix-based prioritization tool where ideas are plotted against 'Impact' (Y-axis) and 'Possibility' (X-axis). Ideas are categorized into 'High Impact, High Possibility', 'High Impact, Low Possibility', 'Low Impact, High Possibility', and 'Low Impact, Low Possibility'.
- After you collaborate:** A summary of the session and options for sharing results.

The bottom of the screen features a toolbar with icons for saving, sharing, and other collaboration functions.



Edit with WPS Office

3. RESULT:

3.1 DATA MODEL

OBJECT NAME	FIELDS IN THE OBJECT	
	Field Label	Data Type
Object 1-Lead	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
Object 1-Buy	Property type	Picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
Object 1-Rent	Rent	Auto Number
	Rental City	Picklist
	BHK Type	Picklist
	Loan ID	Auto Number
	Interest rate	Currency



Edit with WPS Office

Object 1-Loan	Term	Number
	Annual loan	Number
	Total loan Installments	Number
	Loan Repayments	Number
	Loan Amount	Formula

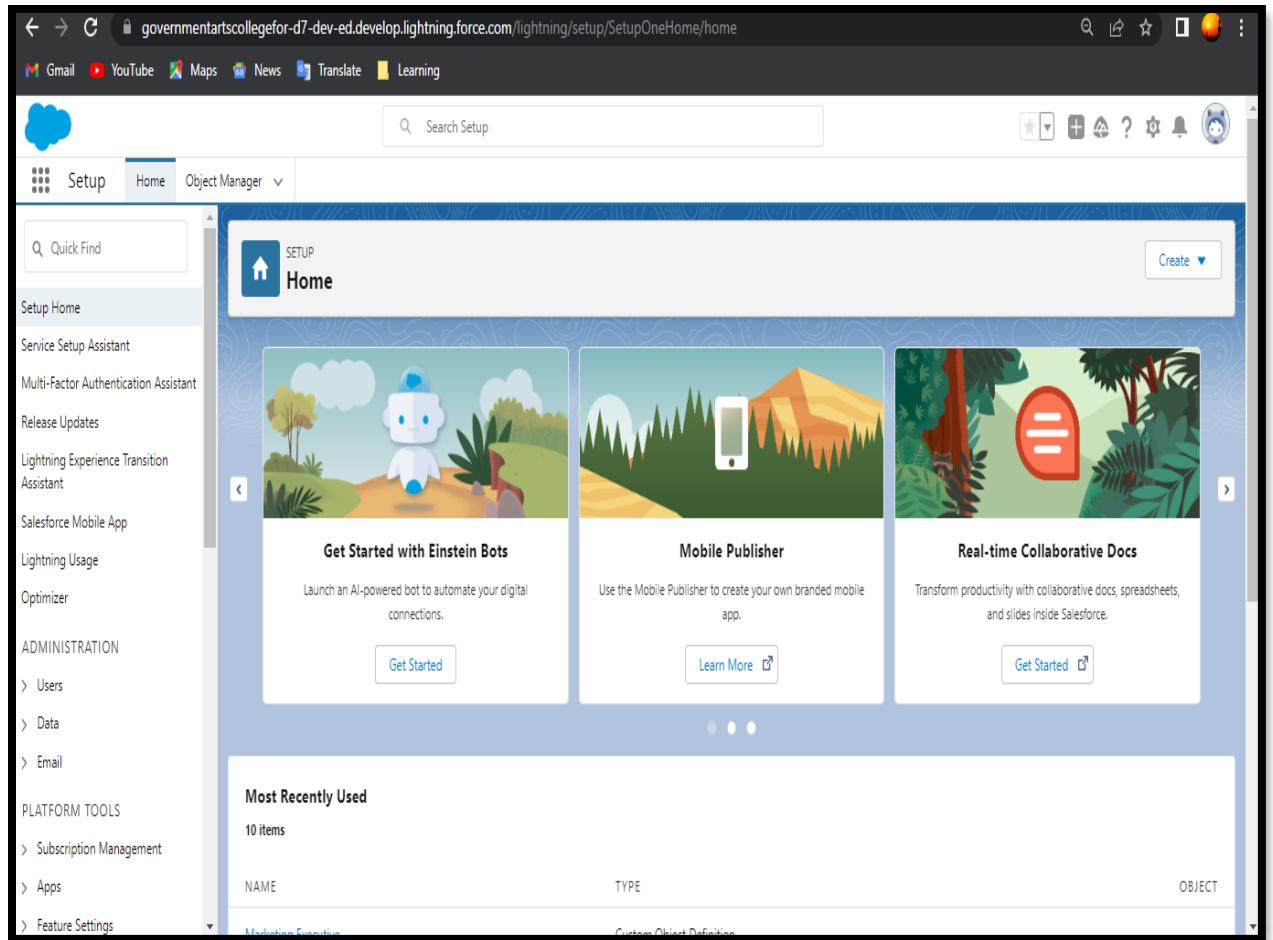
3.2 ACTIVITY & SCREENSHORTS:

Milestone 1-Salesforce:

Activity-1



Edit with WPS Office



Description: Create Developer Account, Create developer org in salesforce and account activation.

Milestone 2-Object

Activity-1:



Edit with WPS Office

The screenshot shows the Salesforce Object Manager page. At the top, there is a navigation bar with links for Gmail, YouTube, Maps, News, Translate, and Learning. Below the navigation bar is a search bar labeled "Search Setup". The main title is "Object Manager" with a "SETUP" icon. A sub-header indicates "2 Items, Sorted by Label". The table below lists the objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
lead	lead_c	Custom Object		26/03/2023	✓
Lead	Lead	Standard Object			

Description: Create the object lead.

Activity-2



Edit with WPS Office

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with links for Gmail, YouTube, Maps, News, Translate, and Learning. Below the navigation bar is a header with a blue cloud icon, a search bar containing "Search Setup", and various system icons. The main content area has a title "Object Manager" with a "SETUP" button. A search bar at the top of the list view contains the word "buy". The list view displays one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
buy	buy_c	Custom Object		25/03/2023	✓

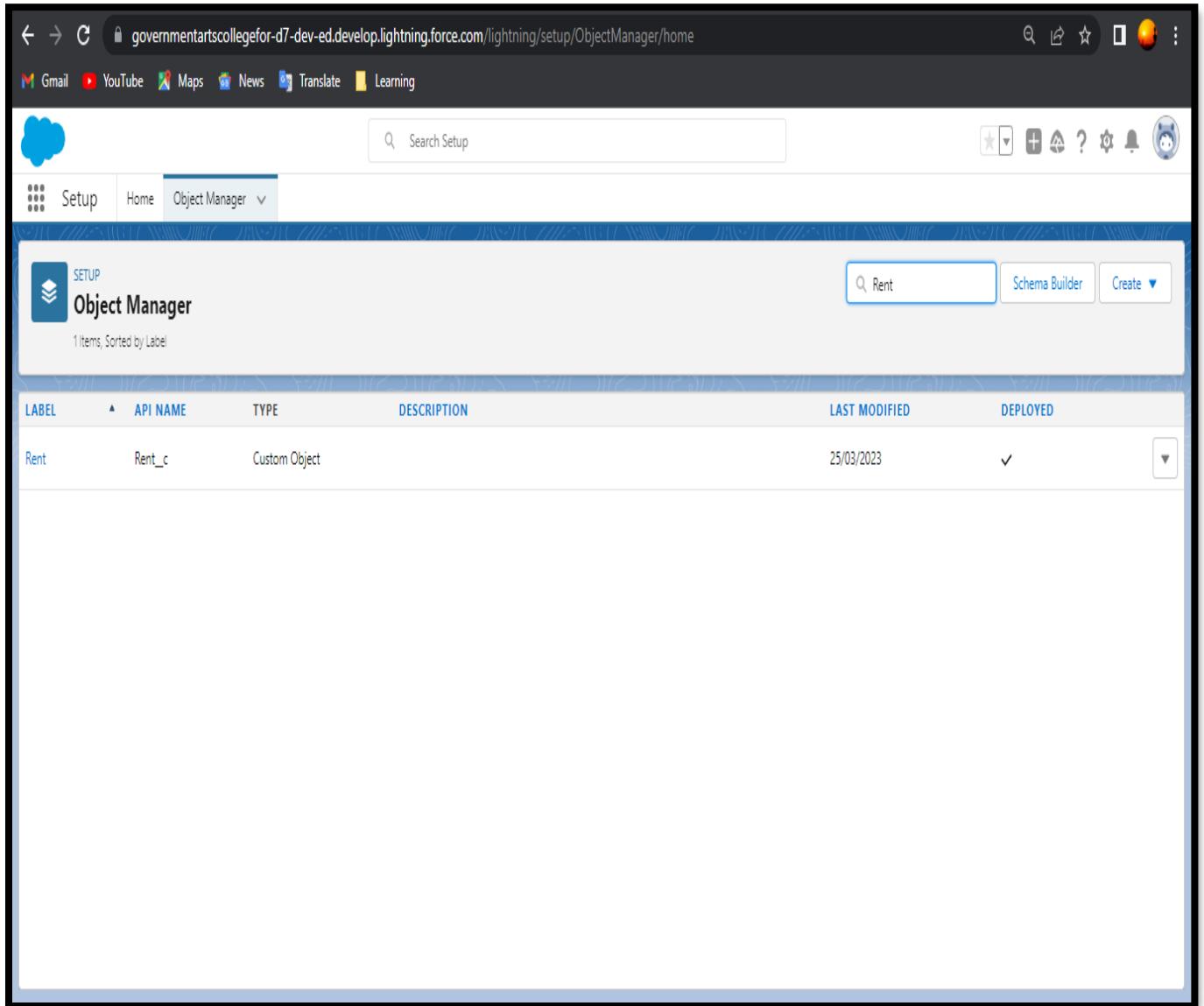
Description:

Create the object buy.



Edit with WPS Office

Activity-3



The screenshot shows the Salesforce Lightning Object Manager interface. At the top, the URL is `governmentartscollegefor-d7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is "Object Manager". The main content area displays a table with one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Rent	Rent_c	Custom Object		25/03/2023	✓

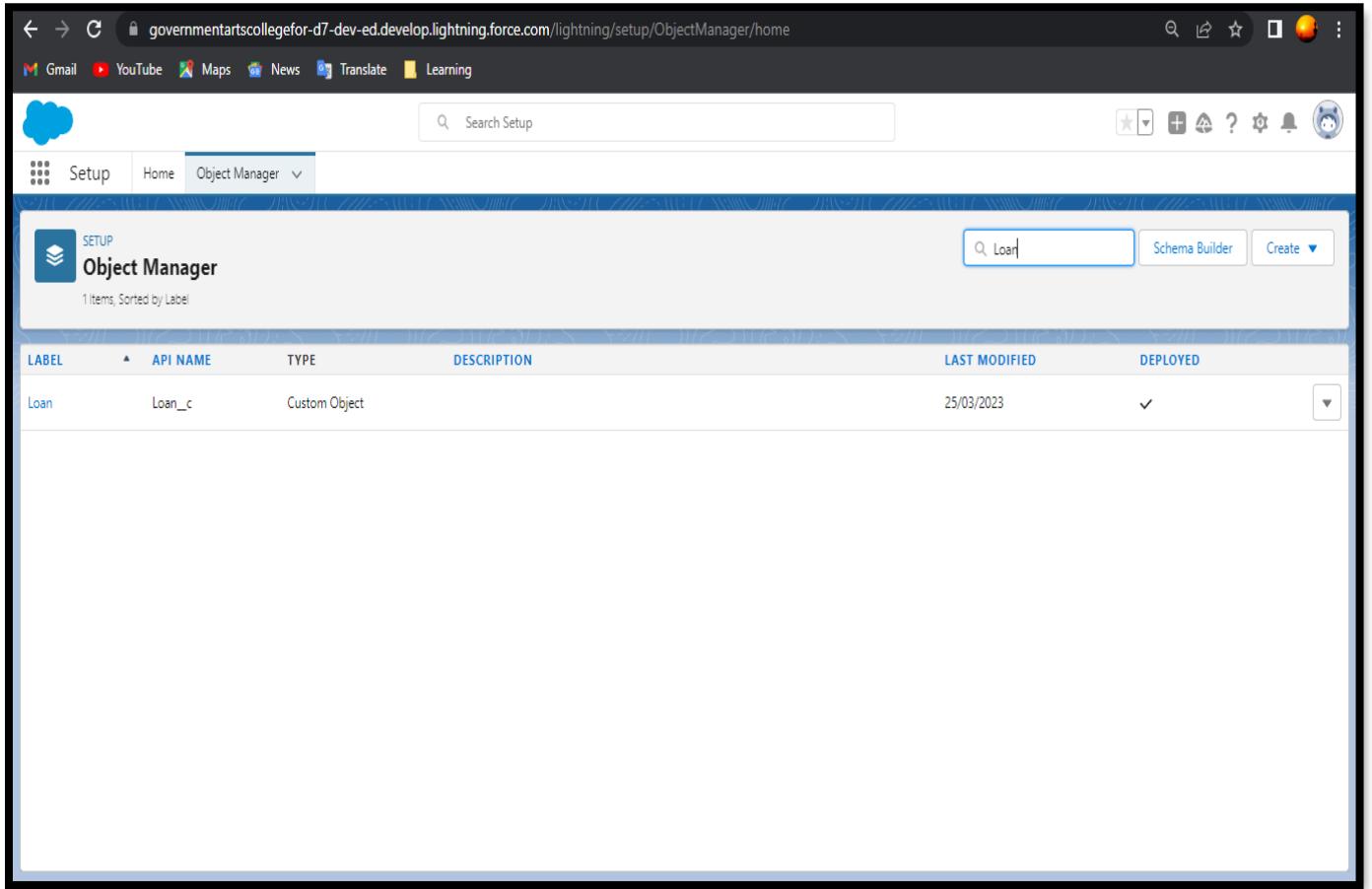
Description:



Edit with WPS Office

Create the object rent.

Activity-4



The screenshot shows the Salesforce Object Manager page. The URL in the browser is `governmentartscollegefor-d7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is "Object Manager". The search bar contains "Loan". The table displays one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Loan	Loan_c	Custom Object		25/03/2023	✓

Description:

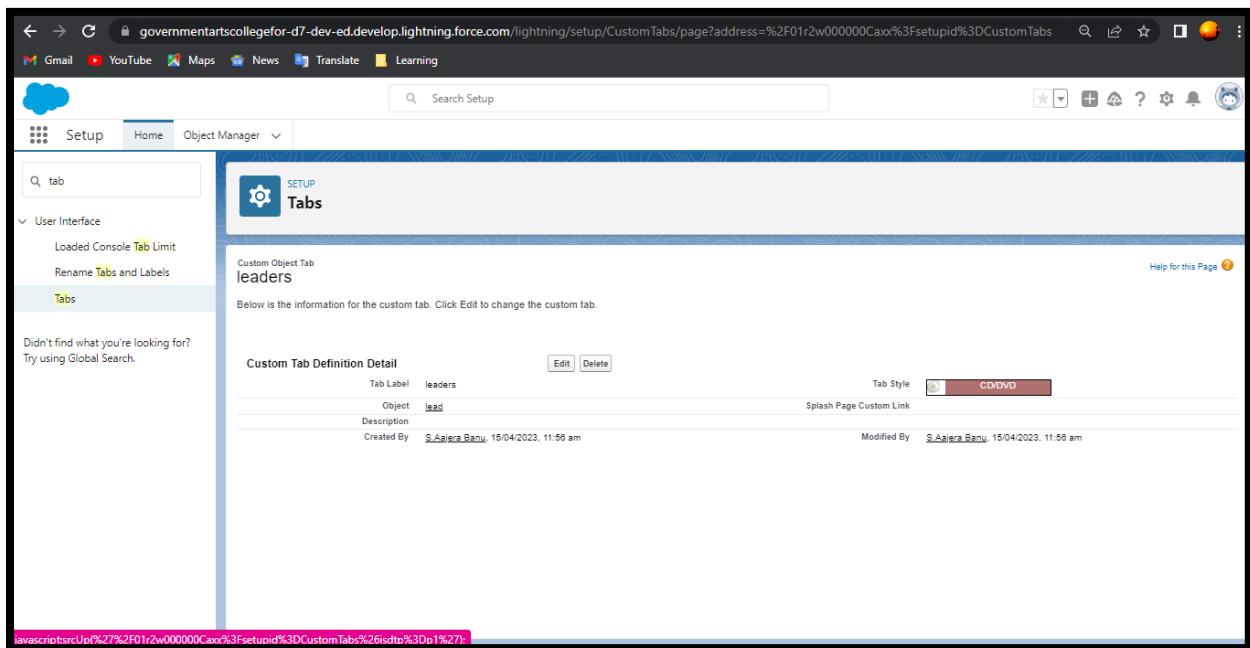
Create the object Loan.



Edit with WPS Office

Milestone 3-TAB

Activity-1



Description:

Create the tab lead



Edit with WPS Office

Activity-2

The screenshot shows the Salesforce Setup interface with the URL governmentartscollegefor-d7-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w00000Clv%3Fsetupid%3DCustomTabs. The browser toolbar includes links to Gmail, YouTube, Maps, News, Translate, and Learning.

The main content area displays the "Tabs" setup page for the "buyers" object. The page title is "Custom Object Tab buyers". A message below states: "Below is the information for the custom tab. Click Edit to change the custom tab." The "Custom Tab Definition Detail" section shows the following information:

Tab Label	buyers	Tab Style	Jewel
Object	buy	Splash Page	Custom Link
Description			
Created By	S.Aajera.Banu, 25/03/2023, 3:41 am	Modified By	S.Aajera.Banu, 25/03/2023, 3:41 am

The left sidebar shows the navigation path: Home > User Interface > Tabs. The "Tabs" item is selected. Other items like "Loaded Console Tab Limit" and "Rename Tabs and Labels" are also visible.



Edit with WPS Office

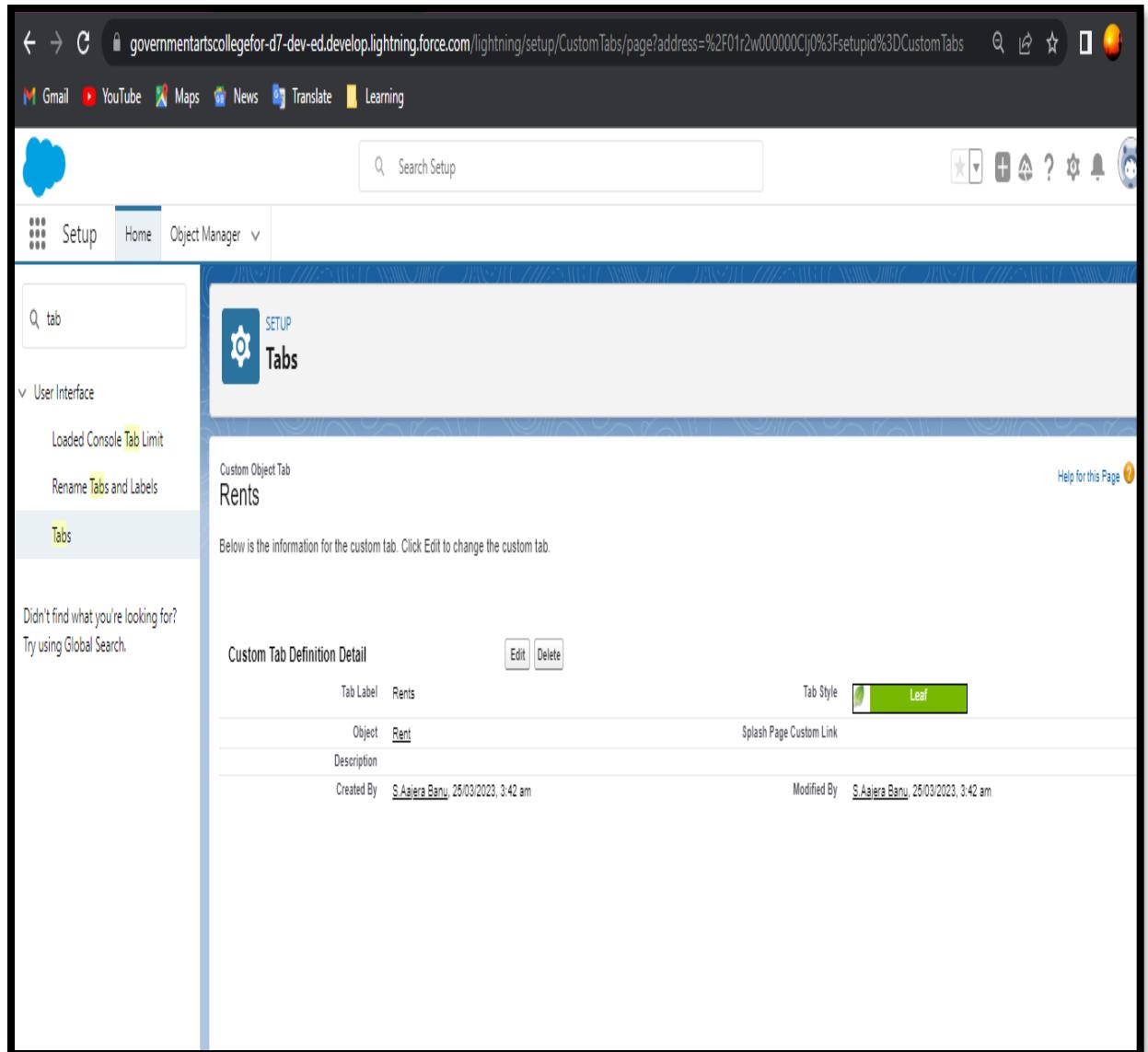
Description:

Create tab buy.

Activity-3



Edit with WPS Office



Description:

Create the tab rent.



Edit with WPS Office

Activity-4

The screenshot shows the Salesforce Lightning setup interface. The URL in the browser is governmentartscollegefor-d7-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w00000CjA%3Fsetupid%3DCustomTabs. The page title is "Custom Tabs".

The left sidebar shows a search bar with "tab" and a "User Interface" section with "Loaded Console Tab Limit" and "Rename Tabs and Labels" options. The "Tabs" option is selected.

The main content area displays a "Tabs" section with a "Custom Object Tab" for "Loans". It includes a "Help for this Page" link. Below the tab name, it says "Below is the information for the custom tab. Click Edit to change the custom tab."

The "Custom Tab Definition Detail" table contains the following information:

Tab Label	Loans	Tab Style	Hexagon
Object	Loan	Splash Page	Custom Link
Description			
Created By	S.Aajera Banu, 26/03/2023, 3:43 am	Modified By	S.Aajera Banu, 26/03/2023, 3:43 am

Description:

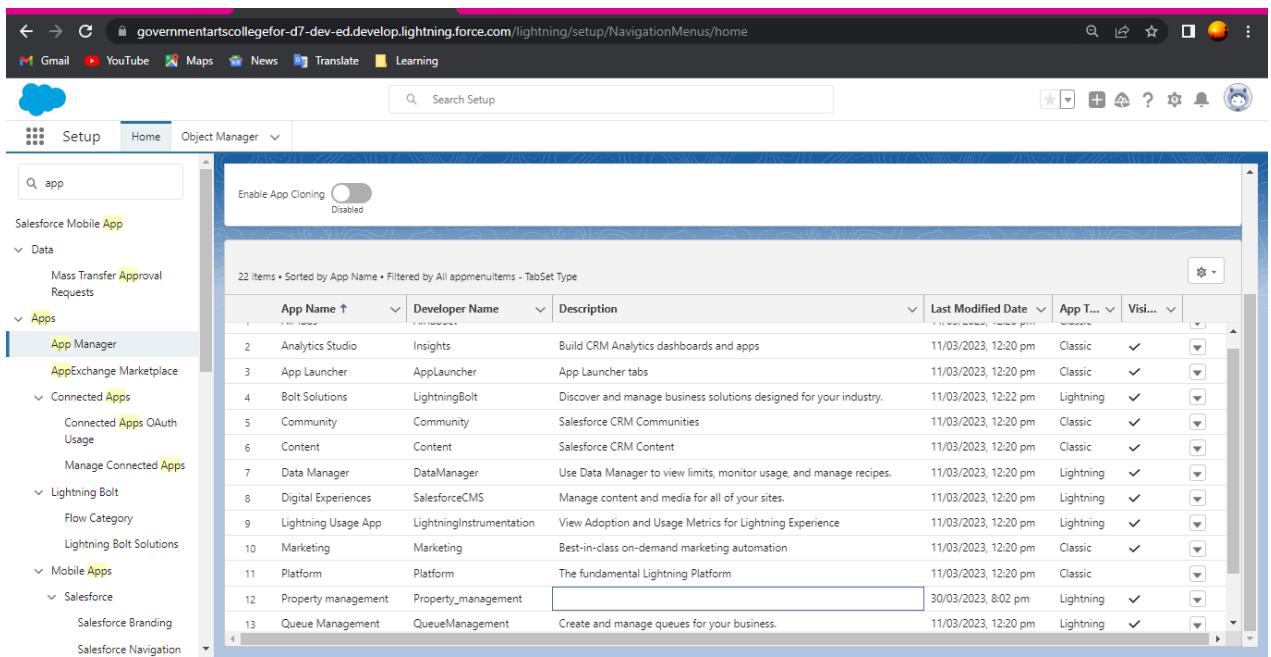


Edit with WPS Office

Create the tab loan.

Milestone 4- Lightning App

Activity-1



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

- Page Header:** governmentartscollegefor-d7-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
- Search Bar:** Search Setup
- Toolbars:** Standard toolbar icons (Home, Object Manager, etc.)
- Left Navigation:**
 - Salesforce Mobile App
 - Data
 - Apps
 - App Manager (selected)
 - AppExchange Marketplace
 - Connected Apps
 - Connected Apps OAuth Usage
 - Manage Connected Apps
 - Lightning Bolt
 - Flow Category
 - Lightning Bolt Solutions
 - Mobile Apps
 - Salesforce
 - Salesforce Branding
 - Salesforce Navigation
- Enable App Cloning:** A toggle switch labeled "Disabled".
- Table:** Displays 22 items sorted by App Name, filtered by TabSet Type. The table includes columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility.

Sample Data from the Table:

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	11/03/2023, 12:20 pm	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	11/03/2023, 12:20 pm	Classic	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	11/03/2023, 12:22 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	11/03/2023, 12:20 pm	Classic	✓
Content	Content	Salesforce CRM Content	11/03/2023, 12:20 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	11/03/2023, 12:20 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	11/03/2023, 12:20 pm	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	11/03/2023, 12:20 pm	Lightning	✓
Marketing	Marketing	Best-in-class on-demand marketing automation	11/03/2023, 12:20 pm	Classic	✓
Platform	Platform	The fundamental Lightning Platform	11/03/2023, 12:20 pm	Classic	✓
Property management	Property_management		30/03/2023, 8:02 pm	Lightning	✓
Queue Management	QueueManagement	Create and manage queues for your business.	11/03/2023, 12:20 pm	Lightning	✓

Description:



Edit with WPS Office

Create the app **Property Management** in app manager.

Milestone 5- Fields

Activity-1



Edit with WPS Office

The screenshot shows the Salesforce Object Manager interface for the 'lead' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main area displays the 'Fields & Relationships' section with 9 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Picklist	state	
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedBy/d	Lookup(User)		
lead	lead_c	Auto Number		
lead Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
state	state__c	Picklist		

Description:

Create the field Lead.



Edit with WPS Office

Activity-2

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'buy' object. The page title is 'SETUP > OBJECT MANAGER buy'. On the left, there's a sidebar with various setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
buy Name	Name	Text(80)		✓
City	City_c	Picklist	state	▼
Created By	CreatedById	Lookup(User)		▼
Discount	Discount_c	Percent(18, 0)		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Owner	OwnerId	Lookup(User,Group)		✓
property type	property_type_c	Picklist		▼
state	state_c	Picklist		▼

The URL at the bottom of the browser window is <https://governmentartscollegefor-d7-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/012w000003oNZS/FieldsAndRelationships/view>.



Edit with WPS Office

Description:

Create the field Buy.

Activity-3



Edit with WPS Office

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Gmail, YouTube, Maps, News, Translate, and Learning. The main header displays the URL: governmentartscollegefor-d7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w000003oNZX/FieldsAndRelationships/view. The page title is "Rent". The left sidebar lists various setup options: Details, Fields & Relationships (which is selected), 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 content area is titled "Fields & Relationships" and shows a table with 8 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK type	BHK_type_c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		▼
Rent	Rent__c	Auto Number		
Rent Name	Name	Text(80)		▼
Rental city	Rental_city_c	Text(18)		▼
Rental city	mumbai_c	Text(18)		▼

Description:

Create the field Rent.



Edit with WPS Office

Activity-4

The screenshot shows the Salesforce Object Manager interface for the 'Loan' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Fields & Relationships' section with 10 items, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
loan Id	loan_Id__c	Auto Number		
Loan Name	Name	Text(80)		✓
Loan Repayment	Loan_Repayment__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Team	Team__c	Number(18, 0)		



Edit with WPS Office

Description:

Create the field Loan.

Milestone 6-Profile

Activity-1

The screenshot shows the Salesforce Setup interface for managing profiles. The main title is "Profiles". A sub-section titled "Profile Edit" is active, showing a form with the following fields:

- Name: Sales manager
- User License: Salesforce
- Description: (empty text area)

Below the form, there is a section titled "Custom App Settings" which lists various application components and their visibility settings. The "Visible" column contains checkboxes, and the "Default" column contains radio buttons. Some components have specific names, while others are grouped under "Salesforce" or "Service".

Component	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>



Edit with WPS Office

The screenshot shows the Salesforce Setup interface under the Profiles section. It lists several profiles: Leads, Marketing Managers, Rents, Sales Managers, Sales Reps 1, and Sales Reps 2. Under each profile, there are sections for Custom Object Permissions, Session Settings, and Password Policies.

Profile	Object	Custom Object Permissions				Session Settings				Password Policies							
		Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All	Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All
Marketing Executives	books	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Marketing Managers	<input type="checkbox"/>							
	buyers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
	leaders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
	Loans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
	Rents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
Sales Managers	Sales Reps 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
	Sales Reps 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
Session Settings									Password Policies								
Session Times Out After: 2 hours of inactivity									Session Security Level Required at Login: None								
User passwords expire in: 90 days									Enforce password history: 3 passwords remembered								
Minimum password length: 8																	

Description:

Create the profile Sales Manager → Standard User Profile.

The screenshot shows the Salesforce Setup interface under the Profiles section, specifically the Profile Edit screen for 'marketing Executive 1'. The profile details include Name: 'marketing Executive 1', User License: 'Salesforce Platform', and a checked 'Custom Profile' checkbox. The 'Custom App Settings' section shows the visibility and default status for various apps: Analytics Studio (standard__Insights), App Launcher (standard__AppLauncher), and Platform (standard__Platform). The 'Service Provider Access' and 'Tab Settings' sections are also visible.



Edit with WPS Office

The screenshot shows the Salesforce Setup interface under the 'Profiles' tab. On the left, there's a search bar and a sidebar with 'Users' and 'Profiles' selected. The main area has a title 'SETUP Profiles'. It contains sections for 'Custom Object Permissions' and 'Session Settings'. The 'Custom Object Permissions' section lists several objects like 'books', 'buyers', 'leaders', 'Loans', and 'Marketing Executives' with checkboxes for various permissions. The 'Session Settings' section shows 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to '--None--'.

Description:

Create the profile Marketing Executive 1and Executive2→Standard Platform User.

The screenshot shows the 'Profile Edit' screen for 'marketing Executive 2'. The profile name is 'marketing Executive 2'. Under 'Custom App Settings', the 'Platform (standard_Platform)' app is set as both 'Visible' and 'Default'. Under 'Service Provider Access', the 'Property management (Property_management)' app is set as both 'Visible' and 'Default'. There are also tabs for 'Tab Settings' and 'JavaScript'.



Edit with WPS Office

The screenshot shows the Salesforce Setup interface under the Profiles section. It displays a grid of permissions for various custom objects across different user profiles. The columns represent basic access (Read, Create, Edit, Delete) and data administration (View All, Modify All). The rows include books, buyers, leaders, Loans, and Marketing Executives on the left, and Marketing Managers, Rents, Sales Managers, Sales Reps 1, and Sales Reps 2 on the right. Below this, there are sections for Session Settings (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None) and Password Policies (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered, Minimum password length: 8, Password complexity requirement: Must include alpha and numeric characters).

Description:

Create the profile Marketing Manager → Standard Platform User.

Activity-2

The screenshot shows the Salesforce Setup interface under the Profiles section, specifically the Profile Edit screen for a profile named "marketing manager". The profile is set to "Salesforce Platform" and is a "Custom Profile". The "Custom App Settings" section is expanded, showing settings for Analytics Studio, App Launcher, and Platform. The "Service Provider Access" and "Tab Settings" sections are also visible at the bottom.



Edit with WPS Office

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar shows a search bar and navigation links for 'Setup', 'Home', 'Object Manager', and 'Users'. The main content area has a header 'SETUP Profiles'. It includes sections for 'Contact Point Consents', 'Streaming Channels', and 'User External Credentials'. Below these are 'Custom Object Permissions' tables for 'books', 'buyers', 'leaders', 'Loans', and 'Marketing Executives', and another for 'Marketing Managers', 'Rents', 'Sales Managers', 'Sales Reps 1', and 'Sales Reps 2'. The 'Marketing Executives' table shows specific permissions: Read, Create, Edit, Delete, View All, and Modify All. The 'Marketing Managers' table shows: Read, Create, Edit, Delete, View All, and Modify All. At the bottom are 'Session Settings' (Session Times Out After: 2 hours of inactivity) and 'Password Policies' (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered).

Description:

In Profile Level give Read and Create Access to Marketing Executive and Read, Create, Edit, Delete for the Marketing Manager.

Activity-3



Edit with WPS Office

Profile Edit

Name: sales manager

User License: Salesforce

Description:

Custom Profile:

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console	<input type="checkbox"/>	<input type="radio"/>

| = Required information

Custom Object Permissions

	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
books	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
buyers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
leaders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Loans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Marketing Executives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
Marketing Managers	<input type="checkbox"/>	<input type="checkbox"/>						
Rents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Sales Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Sales Reps 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Sales Reps 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password match requirement: Cannot contain password

Description:

In Profile Level Sales Manager is Having Create, Edit, Delete



Edit with WPS Office

- For Sales Rep1→Read,Create,Edit
- For Sales Rep2→Read,Create,Edit
- For Sales Rep3→only

Milestone7-New User

Activity-1

User Detail		Role	
Name	S.Aajera Banu	User License	Salesforce
Alias	SBanu	Profile	System Administrator
Email	aajera.banu05@gmail.com	Active	<input checked="" type="checkbox"/>
Username	aajerabantu@maths.com	Marketing User	<input checked="" type="checkbox"/>
Nickname	aajerabantu	Offline User	<input checked="" type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	Government arts college for women	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input checked="" type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	IN	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input checked="" type="checkbox"/>
Language	English	Data.com User Type	<input checked="" type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager			

Description:

Create the new user.



Edit with WPS Office

Milestone 8 - Permission Set

Activity-1

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'Users' section under 'Setup'. The main content area displays the 'User Detail' page for a user named 'S.Aajera Banu'. The user's name is listed at the top, followed by a list of profile settings. The 'Role' section indicates the user is assigned to the 'Salesforce' role and the 'System Administrator' profile. Other checked roles include 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Service Cloud User', and 'WDC User'. The 'Mobile Push Registrations' field is set to 'View'. The 'Data.com User Type' field is also visible.

Description:

Create the Permission set,

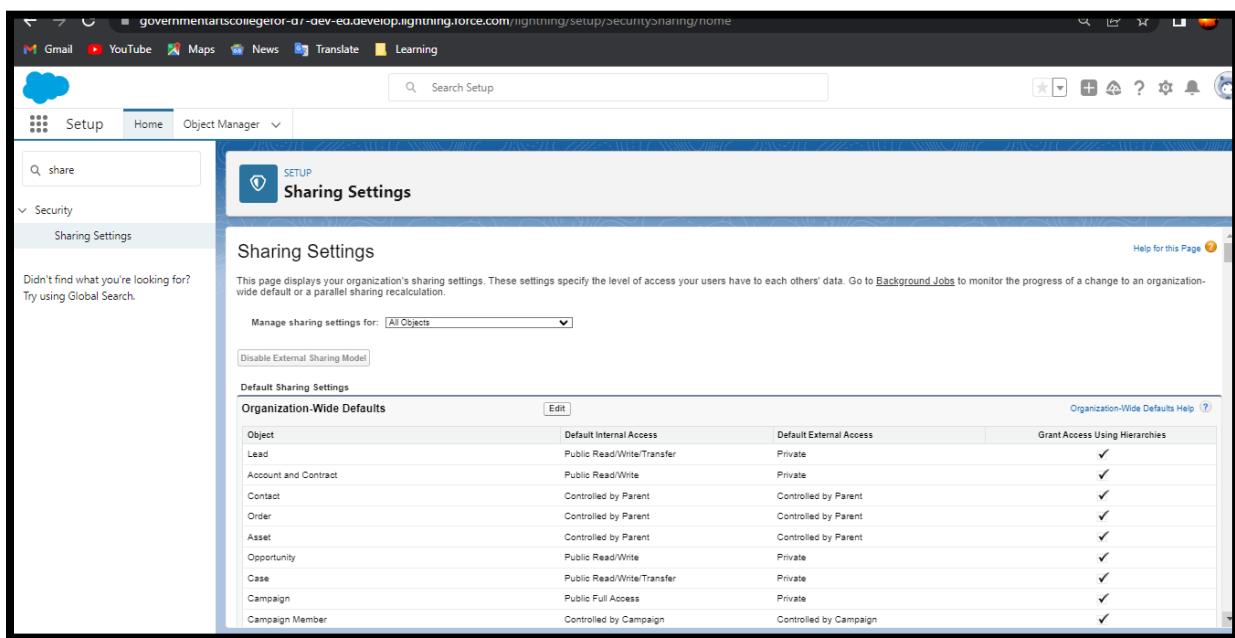
Add access for Sales Rep3 give Access with Permission for the User.



Edit with WPS Office

Milestone 9 – Setup for OWD

Activity-1



The screenshot shows the Salesforce Sharing Settings page. The URL is governmentartscollegeor-ar-a-dev-ed.lightning.force.com/lightning/setup/securitySharing/home. The page title is "Sharing Settings". The left sidebar has a search bar and navigation links for "Security" and "Sharing Settings". A message says "Didn't find what you're looking for? Try using Global Search." The main content area displays the "Sharing Settings" table. The table has columns for "Object", "Default Internal Access", "Default External Access", and "Grant Access Using Hierarchies". The table rows show the following data:

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



Edit with WPS Office

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and a 'Sharing Settings' section. Below it, a note says 'Didn't find what you're looking for? Try using Global Search.' The main area is titled 'Sharing Settings' and lists various objects with their sharing levels. A checkmark column indicates if 'Grant Access Using Hierarchies' is selected.

Sharing Setting	Object	Sharing Level	Grant Access Using Hierarchies
User Provisioning Request	User Provisioning Request	Private	✓
Web Cart Document	Web Cart Document	Private	✓
Work Order	Work Order	Private	✓
Work Plan	Work Plan	Private	✓
Work Plan Template	Work Plan Template	Private	✓
Work Step Template	Work Step Template	Private	✓
Work Type	Work Type	Private	✓
Work Type Group	Work Type Group	Public Read/Write	✓
book	book	Private	✓
buy	buy	Private	✓
lead	lead	Private	✓
Loan	Loan	Private	✓
Marketing Executive	Marketing Executive	Private	✓
Marketing Manager	Marketing Manager	Private	✓
Rent	Rent	Private	✓
Sales Manager	Sales Manager	Private	✓
Sales Rep 1	Sales Rep 1	Private	✓
Sales Rep 2	Sales Rep 2	Private	✓

Description:

Create OWD Setting,

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

Activity-2

Marketing, Sales



Edit with WPS Office

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a 'Sharing Settings' section under 'Security'. The main area is titled 'Sharing Settings' and lists various objects with their sharing permissions. Most objects have 'Private' sharing settings. A few specific ones like 'Marketing Executive' and 'Marketing Manager' have 'Private' sharing settings. Some objects like 'Work Type Group' and 'Sales Manager' have 'Public Read/Write' sharing settings.

Object	User Read	User Write
User Provisioning Request	Private	Private
Web Cart Document	Private	Private
Work Order	Private	Private
Work Plan	Private	Private
Work Plan Template	Private	Private
Work Step Template	Private	Private
Work Type	Private	Private
Work Type Group	Public Read/Write	Private
book	Private	Private
buy	Private	Private
lead	Private	Private
Loan	Private	Private
Marketing Executive	Private	Private
Marketing Manager	Private	Private
Rent	Private	Private
Sales Manager	Private	Private
Sales Rep 1	Private	Private
Sales Rep 2	Private	Private

Description:

- ✓ Create the Record level OWD Setting give it as a private to Marketing manager and Marketing Executive.
- ✓ Sale Manger OWD is set as Private sales Rep2 same OWD.

Milestone 10 – Report

Activity 1



Edit with WPS Office

governmentartscollegefor-d7-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000E9T9gEAF/view

The screenshot shows a Salesforce report titled "Report: Leads New Leads Report". The report displays a list of leads with the following columns: Title, First Name, Last Name, Company / Account, Email, Lead Source, Street, Rating, and Lead Owner. The data is grouped by title, with subtotals for each group. The report includes a search bar at the top and various navigation and editing tools.

Title	First Name	Last Name	Company / Account	Email	Lead Source	Street	Rating	Lead Owner
Eugena Luce	Eugena	Luce	Pacific Retail Group	eluce@pacificretail.com	Purchased List	-	-	S.Aajera Banu
Subtotal								
CFO (4)	Phyllis Cotton	Cotton	Abbott Insurance	pcotton@abbottins.net	Web	-	-	S.Aajera Banu
	Brenda Mcclure	Mcclure	Cardinal Inc.	brenda@cardinal.net	Web	-	-	S.Aajera Banu
	David Monaco	Monaco	Blues Entertainment Corp.	david@blues.com	Purchased List	-	-	S.Aajera Banu
	Bill Dadio Jr	Dadio Jr	Zenith Industrial Partners	bill_dadio@zenith.com	Web	-	-	S.Aajera Banu
Subtotal								
Director, Warehouse Mgmt (1)	Kristen Akin	Akin	Aethra Home Products	kakin@athenahome.com	Partner Referral	-	-	S.Aajera Banu
Subtotal								
Director of Vendor Relations (1)	Bertha Boxer	Boxer	Farmers Coop. of Florida	bertha@fcf.net	Web	321 Westcott Building	Hot	S.Aajera Banu
Subtotal								
Regional General Manager (1)	Kathy Snyder	Snyder	TNR Corp.	ksynder@tnr.net	Purchased List	-	-	S.Aajera Banu
Subtotal								
SVP, Administration and Finance (1)	Pat Stumuller	Stumuller	Pyramid Construction Inc.	pat@pyramid.net	Phone Inquiry	-	-	S.Aajera Banu
Subtotal								
Row Counts	Detail Rows	Subtotals	Grand Total					

governmentartscollegefor-d7-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000E9T9REAV/view?queryScope=userFolders

The screenshot shows a Salesforce report titled "Report: Loans New Loans Report". The report displays a list of loans with the following columns: Team, Loan: Loan Name, Interest Rate, Annual Loan, Loan Repayment, and Total Loan Instalments. The data is grouped by loan type, with subtotals for each group. The report includes a search bar at the top and various navigation and editing tools.

Total Records	Total Interest Rate	Total Annual Loan	Total Loan Repayment	Total Total Loan Instalments
4	₹138	15,68,958	72,523	240
Subtotal				
53 (1)	Educational Loan	₹3	3,78,900	67,800
		₹3	3,78,900	67,800
Subtotal				
578 (1)	Gold Loan	₹45	56,900	67
		₹45	56,900	67
Subtotal				
678 (1)	Home loan	₹6	4,58,900	4,600
		₹6	4,58,900	4,600
Subtotal				
7,412 (1)	Tour Loan	₹64	6,74,258	56
		₹64	6,74,258	74
Subtotal				
Total (4)	₹138	15,68,958	72,523	240
Row Counts	Detail Rows	Subtotals	Grand Total	



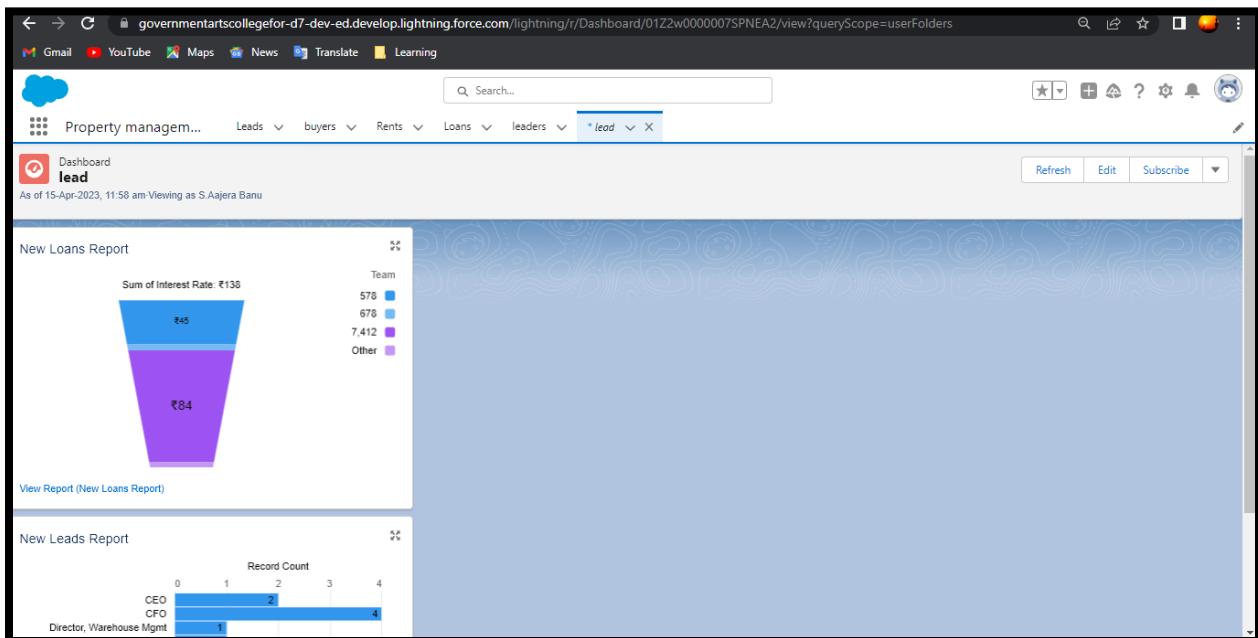
Edit with WPS Office

Description:

- ✓ Create the Report for Lead.
- ✓ Create the Report for Loan.

Milestone 11 – Dashboards

Activity-1



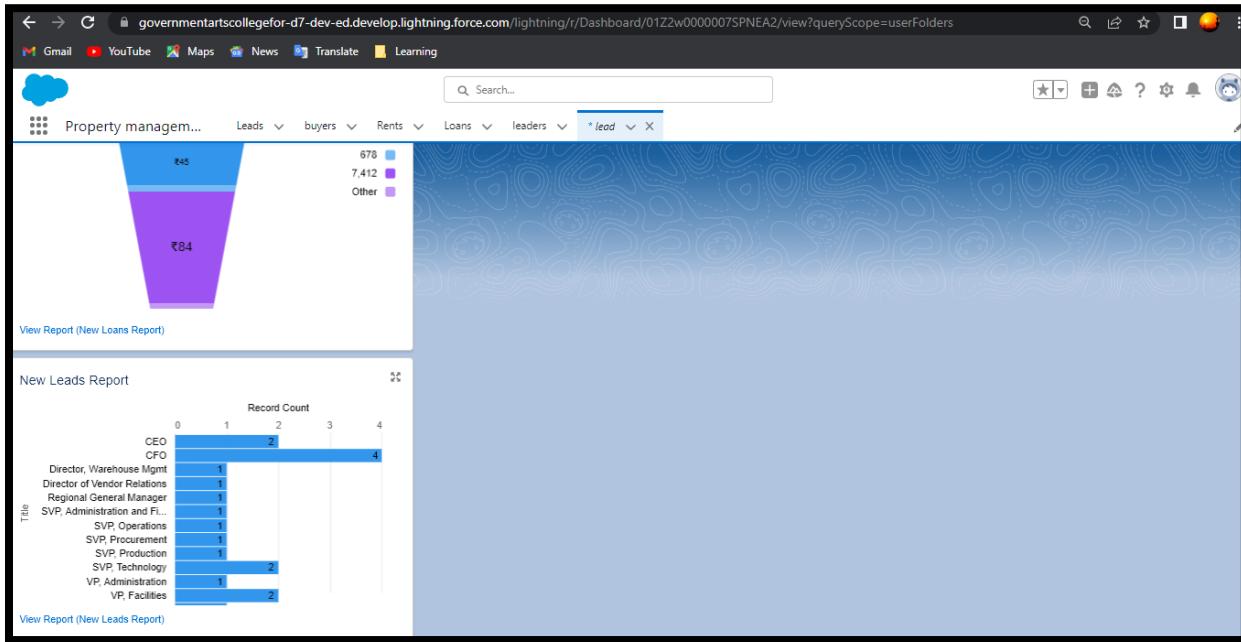
Description:

Create the Dashboard for lead report.



Edit with WPS Office

Activity-2



Description:

Create the Dashboard for loan report.



Edit with WPS Office

4 TRAILHEAD PROFILE PUBLIC URL:

TEAM LEADER- trailblazer.me/id/abanu667

TEAM MEMBER-1 <https://trailblazer.me/id/tswetha12>

TEAM MEMBER-2 <https://trailblazer.me/id/asasu4>

TEAM MEMBER-3 <https://trailblazer.me/id/bbhuvana16>

ADVANTAGES & DISADVANTAGES:

Advantages

- Infinite customizability of the system,
- Marketing Automation,
- Enhanced reletion.

Disadvantages

- One of the biggest challenges in salesforce implementation is getting uses to adopt the system.
- One of the most common issues is data integration.



Edit with WPS Office

5 APPLICATION:

A Property Management system used in Hospitality to control, Organize and execute operations and day to day activities of a hotel, hostel, inn or vacation rental property.

6 CONCLUSION:

The foremost thing to consider first is that salesforce is presence as an excellent tool and ideal kept all departments of a company on the same page.

Salesforce is popular CRM platform today. After reading this tutorial you would know what property management in salesforce is why salesforce what is salesforce services and its application.

8. FUTURE SCOPE:

With over 150,000 organizations utilizing salesforce across the world to full this growth .It's the most



Edit with WPS Office

popular and widely used CRM platform industries have adopted salesforce for their daily procedures and work needs across the board. Small-scale companies to internet like google and faceboook use salesforce services and product to solve business challenges.

Most In Demand Salesforce career opportunities:

1. Salesforce Administrator
2. Salesforce Developer
3. Salesforce consultant
4. Salesforce Architect



Edit with WPS Office