

PROPERTY MANAGEMENT SYSTEM

NAME	NM ID	REG NO
Jestin Johnson George	09B3FD18717B10BB4604375A2A40AB18	963820104017
Bineesh B	1F23BB5C77169879A964C56CF31F979A	963820104011
Adharsh Swaminathan	FACF90D4CFDD2AE9B374D08674DC6979	963820104005
Abin sounderraj	85A5F62BBC82571ACE04E08E3B95E5DB	963820104003
Abhijith R	5FA1BE87C43E9798BD443B80029275F6	963820104001

STEP 1: CREATE A SALESFORCE ACCOUNT

The screenshot shows the Salesforce user profile for Abin Sounderraj. The header includes a navigation bar with 'Choose Your Tour', a search bar, and user information. The profile card displays the user's name, a profile picture, and a bio: 'Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)'. Below the profile card, there are sections for 'Details' and 'Related'. The 'Details' section shows fields for Name, Title, Email, Manager, Company Name, and Phone. The 'Related' section shows 'Groups (0)' and 'Files (0)'.

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search...

Property Managem... Home Leads ▾ Properties ▾ Loans ▾ Reports ▾ Dashboards ▾ * Abin Sounderraj ▾ X

Abin Sounderraj Edit User Detail

Share your awesomeness with the world.
(Or at least with your colleagues on Chatter.)

Learn new skills on Trailhead, the fun way to learn Salesforce.

Connect with fellow Trailblazers on the Trailblazer Community.

Details

Name	Manager
Abin Sounderraj	
Title	Company Name
	gsct
Email	Phone
abinsounderrajdev@gmail.com	

Related

Groups (0)

Files (0)

STEP 2: CREATE THE OBJECT (PROPERTY & LOAN)

The screenshot shows the Salesforce Object Manager setup page. The header includes a navigation bar with 'Choose Your Tour', a search bar, and user information. The main content area displays a table of objects, including standard and custom objects. The table has columns for Label, API Name, Type, Description, Last Modified, and Deployed.

Choose Your Tour ▾ Leave Feedback Days left in trial 27 Buy Now

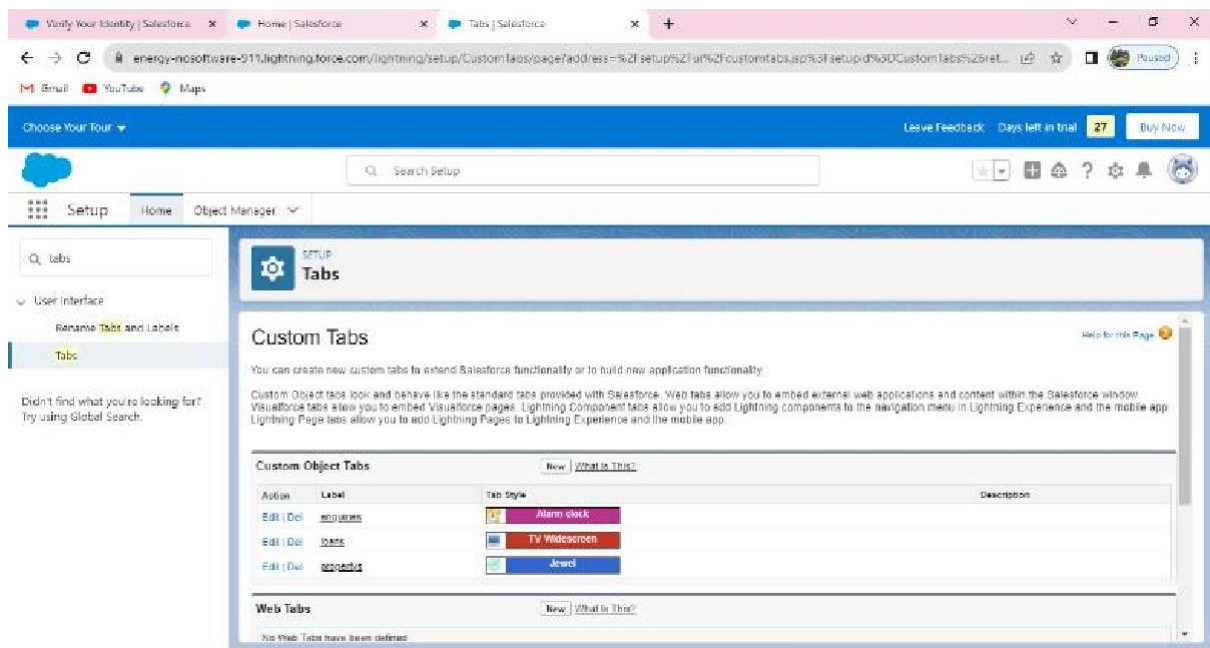
Search Setup

Setup Home Object Manager ▾

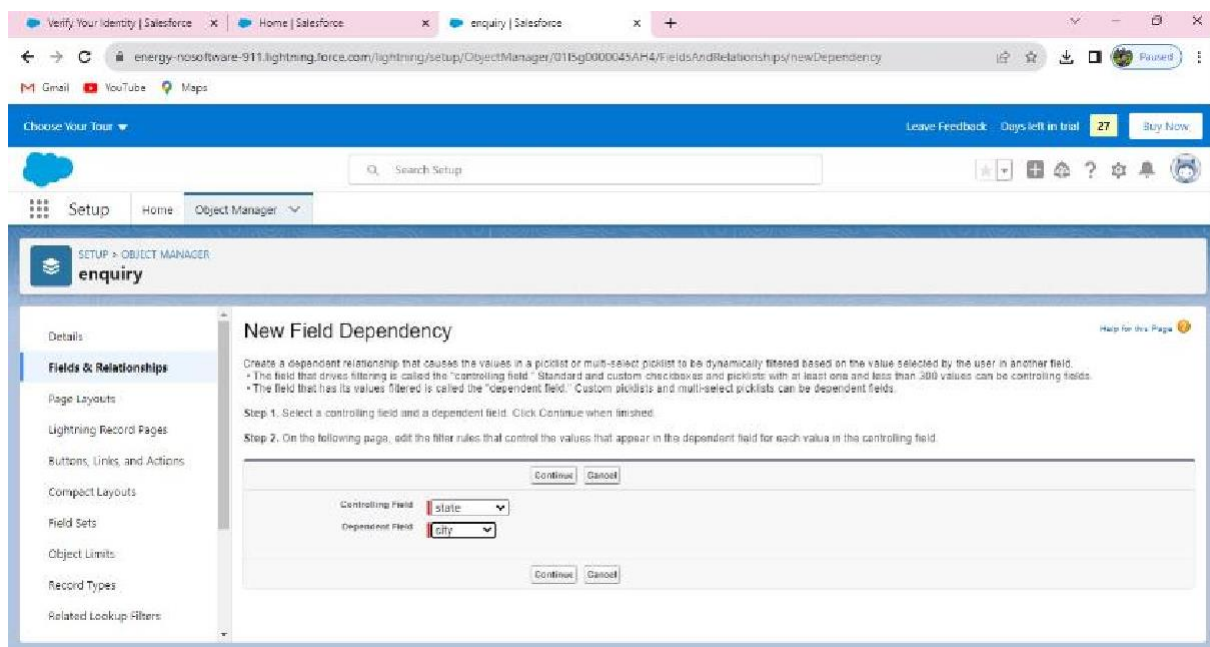
Object Manager 49 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Account Contact Relationship	AccountContactRelation	Standard Object			
Activity	Activity	Standard Object			
Asset	Asset	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Activity	Activity__c	Custom Object		19/10/2023	✓
Campaign	Campaign	Standard Object			
Campaign Influence	CampaignInfluence	Standard Object			
Campaign Member	CampaignMember	Standard Object			

STEP 3 CREATE THE LIGHTNING TAB TO CREATE A TAB : (ENQUIRE & TAB)



STEP 4 CREATE PICKLIST FIELDS ON OBJECT (ENQUIRY , PROPERTY,& LOAN)



energy-rusoftware-911 lightning.force.com/lightning/setup/ObjectManager/0115g0000045A+19/FieldsAndRelationships/view

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
property

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Fields & Relationships
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Eng. Lines	EngLines_c	Formula (text)		
Last Modified By	LastModifiedDate	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
property Name	Name	Text(80)		✓

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
loan

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Details

Description

API Name
loan__c

Custom
✓

Singular Label
loan

Plural Label
loans

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Step 5 create page layout for property object

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
property

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Page Layouts
3 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
buy	RAJA, S, 22/10/2023, 11:05 am	RAJA, S, 22/10/2023, 11:06 am
property Layout	RAJA, S, 22/10/2023, 9:10 am	RAJA, S, 22/10/2023, 10:40 am
rent	RAJA, S, 22/10/2023, 11:09 am	RAJA, S, 22/10/2023, 11:10 am

STEP 6 : CREATE A RECORD TYPE FOR PROPERTY OBJECT

Choose Your Tour

Leave Feedback

Days left in trial

26

Buy Now

Search Setup

Setup

Home

Object Manager

property

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Recent Type

Buy

Back to Custom Objects: property

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label

Buy

Active

✓

Record Type Name

Buy

Name/Space Prefix

Description

Created By

RAJA S

22/10/2023, 7:03 pm

Modified By

RAJA S

22/10/2023, 7:08 pm

PAGE LAYOUT ASSIGNMENT

Choose Your Tour

Leave Feedback

Days left in trial

26

Buy Now

Search Setup

Setup

Home

Object Manager

property

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Page Layout Assignment

property

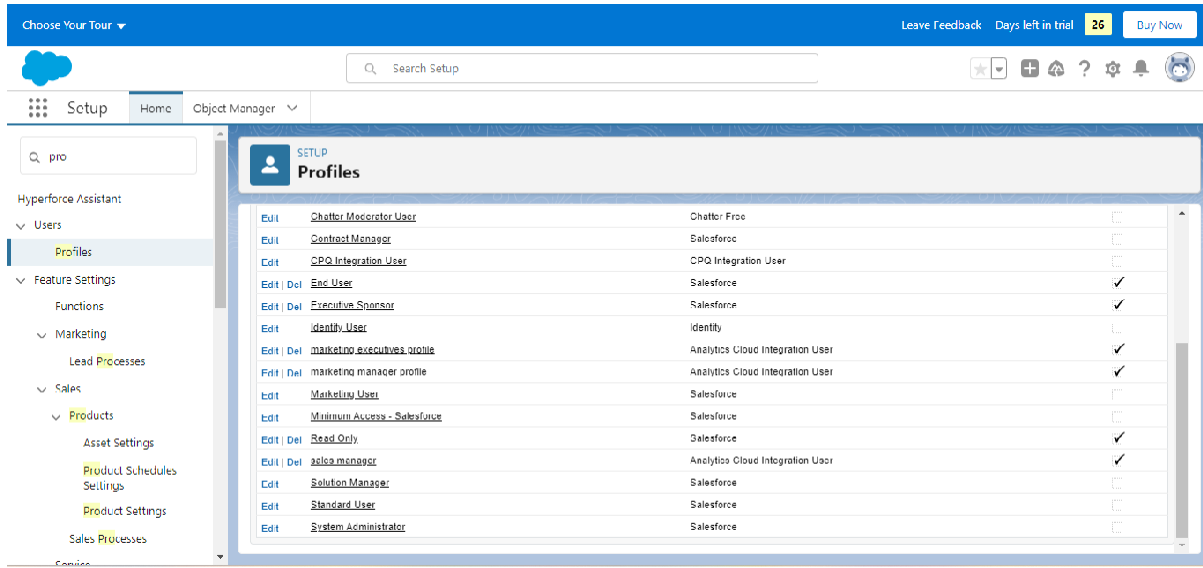
Back to Custom Objects: property

The table below shows the page layout assignments for different record type and profile combinations

Edit Assignment

Profiles	Record Types	
Analytics Cloud Integration User	Master	Buy
Analytics Cloud Security User		Buy
Chatter External User		Buy
Chatter Free User		Buy
Chatter Moderator User		Buy
Contract Manager		Buy
CPQ Integration User		Buy
End User		Buy
Executive Sponsor		Buy
Identity User		Buy
marketing executive profile		Buy

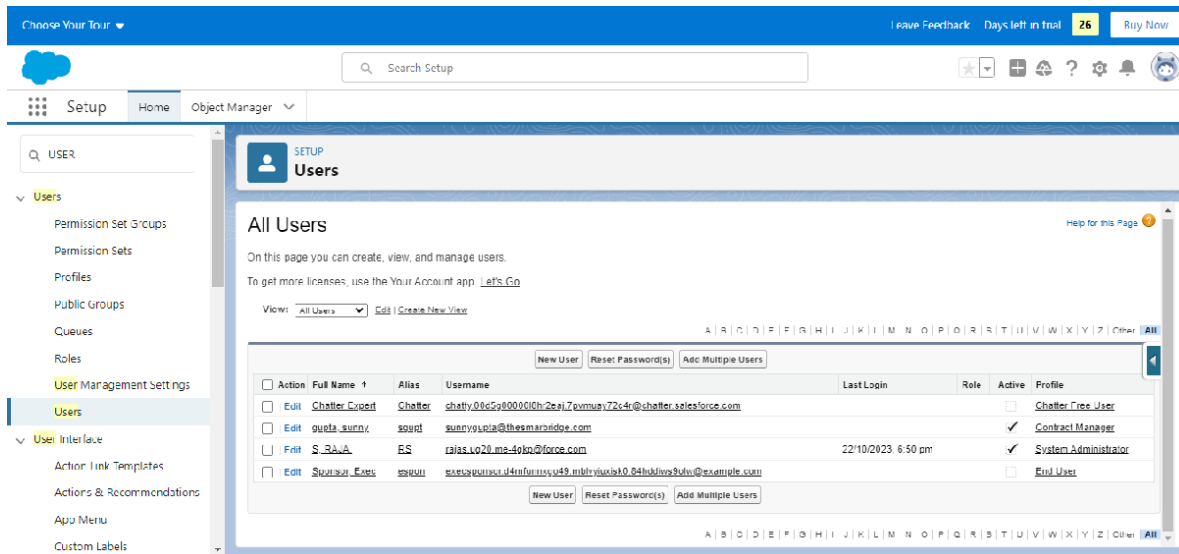
STEP 6 : TO CREATE A NEW PROFILE (SALES MANAGER ,MARKETING EXECUTIVE & SALES EXECUTIVE)



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'pro' entered. The 'Profiles' link under the 'Users' section is highlighted. The main content area is titled 'SETUP Profiles' and displays a table of existing profiles.

Profile Name	Role	Active
Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Contract Manager	Salesforce	<input type="checkbox"/>
CPQ Integration User	CPQ Integration User	<input type="checkbox"/>
Enc User	Salesforce	<input checked="" type="checkbox"/>
Executive Sponsor	Salesforce	<input checked="" type="checkbox"/>
Identity User	Identity	<input type="checkbox"/>
marketing executives profile	Analytics Cloud Integration User	<input checked="" type="checkbox"/>
marketing manager profile	Analytics Cloud Integration User	<input checked="" type="checkbox"/>
Marketing User	Salesforce	<input type="checkbox"/>
Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
Read Only	Salesforce	<input checked="" type="checkbox"/>
sales manager	Analytics Cloud Integration User	<input checked="" type="checkbox"/>
Solution Manager	Salesforce	<input type="checkbox"/>
Standard User	Salesforce	<input type="checkbox"/>
System Administrator	Salesforce	<input type="checkbox"/>

STEP 7 : CREATE USER



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'USER' entered. The 'Users' link under the 'Users' section is highlighted. The main content area is titled 'SETUP Users' and displays a table of existing users.

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app [Let's Go](#)

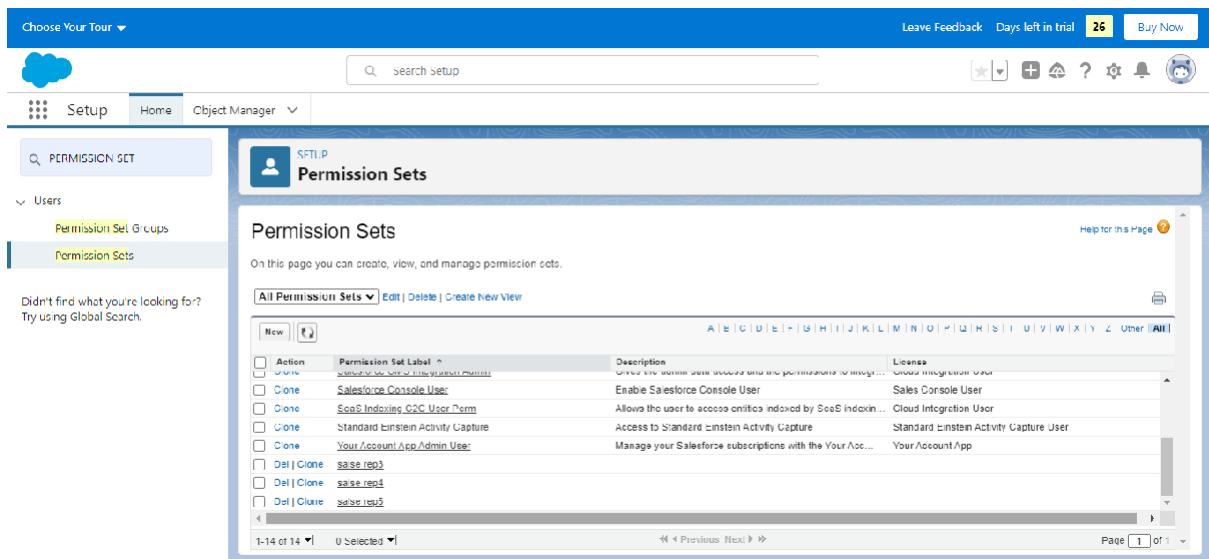
View: **All Users** | [Edit](#) | [Create New User](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty08c5p000000h2eai7evmua972c4r@chatter.salesforce.com			<input type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	quella sumer	sumer	sumryyupia@theemariadice.com			<input checked="" type="checkbox"/>	Contract Manager
<input type="checkbox"/> Edit	S. B. A. A.	BS	raias.v020.ms-dyn@force.com	22/10/2023 6:50 pm		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Sumner, Eric	sumer	sumryyupia04mfor1145u49.mibryvux90.64hduliv98ulu@example.com			<input type="checkbox"/>	End User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

STEP 8 CREATE THE PERMISSION SET



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Permission Sets' and includes a search bar and a list of permission sets. The list has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The 'All Permission Sets' dropdown is set to 'All'. The list shows several permission sets, including 'Salesforce Console User', 'Sales Console User', 'Sales Integration User', 'Cloud Integration User', 'Standard Einstein Activity Capture', and 'Your Account App Admin User'. The bottom of the list shows '1-14 of 14' items and '0 Selected'.

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search Setup

Setup Home Object Manager ▾

PERMISSION SET

Users

Permission Set Groups

Permission Sets

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

SETUP Permission Sets

On this page you can create, view, and manage permission sets.

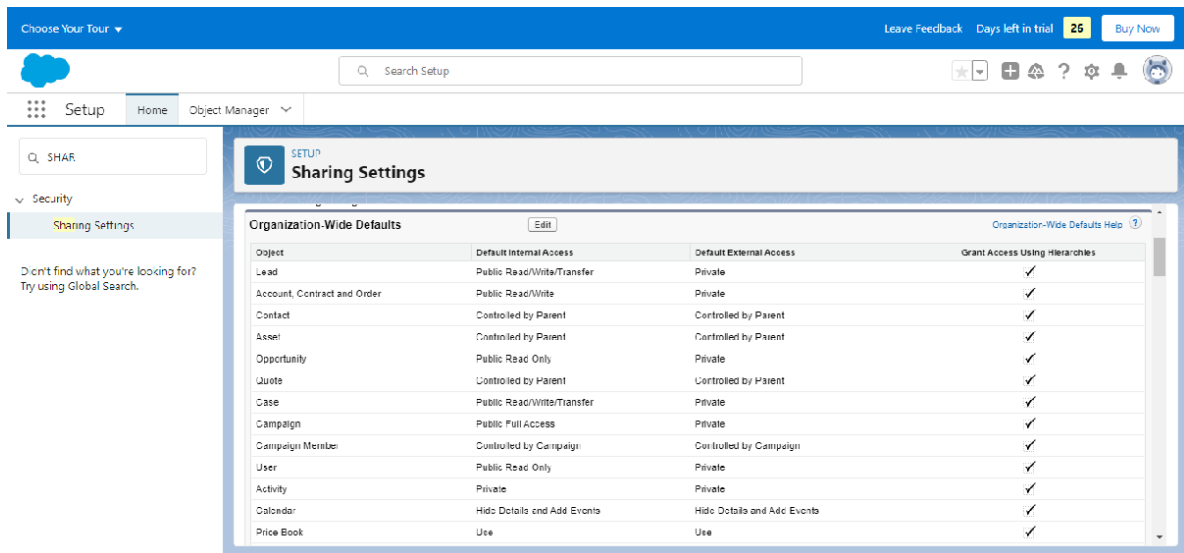
All Permission Sets ▾ Edit Delete Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/>	Sales Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/>	Sales Integration User	Allow the user to access entities indexed by Salesforce Integration User	Sales Integration User
<input type="checkbox"/>	Cloud Integration User	Allow the user to access entities indexed by Salesforce Integration User	Cloud Integration User
<input type="checkbox"/>	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/>	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Account App	Your Account App

1-14 of 14 0 Selected Previous Next Page 1 of 1

STEP 9 (SETUP FOR OWD)



The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' section. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Sharing Settings' and includes a search bar and a table of organization-wide defaults. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The 'All Sharing Settings' dropdown is set to 'All'. The table lists various objects and their default access settings, including 'Lead', 'Account, Contract and Order', 'Contact', 'Asset', 'Opportunity', 'Quote', 'Case', 'Campaign', 'Campaign Member', 'User', 'Activity', 'Calendar', and 'Price Book'.

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search Setup

Setup Home Object Manager ▾

SHARING

Security

Sharing Settings

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

SETUP Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account, Contract and Order	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read Only	Private	✓
Quote	Controlled by Parent	Controlled by Parent	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓

STEP 10 USER ADOPTION (ENQUIRE) (CREATE,VIEW, DELETE)

CREATE

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search...

property managem... enquiries ▼ property ▼ loans ▼ Dashboards ▼ * RAJA.S ▼ X

enquiry SUNNY New Contact Edit New Opportunity ▾

Related Details

* - Required Information

* enquiry Name: SUNNY Owner: RAJA.S

enquiry number: 2

state: rajasthan View all dependencies

city: --None-- View all dependencies

Created By: RAJA.S, 22/10/2023, 7:42 pm Last Modified By: RAJA.S, 22/10/2023, 7:42 pm

Cancel Save

VIEW

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search...

property managem... enquiries ▼ property ▼ loans ▼ Dashboards ▼ * RAJA.S ▼ X

enquiry SUNNY New Contact Edit New Opportunity ▾

Related Details

enquiry Name: SUNNY Owner: RAJA.S

enquiry number: 2

state: rajasthan

city: --None--

Created By: RAJA.S, 22/10/2023, 7:42 pm Last Modified By: RAJA.S, 22/10/2023, 7:42 pm

DELETE

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search...

property managem... enquiries ▼ property ▼ loans ▼ Dashboards ▼ * RAJA.S ▼ X

enquiry SUNNY New Contact Edit New Opportunity ▾

Related Details

enquiry Name: SUNNY Owner: RAJA.S

enquiry number: 2

state: rajasthan View all dependencies

city: --None-- View all dependencies

Created By: RAJA.S, 22/10/2023, 7:42 pm Last Modified By: RAJA.S, 22/10/2023, 7:42 pm

Cancel Save

Delete enquiry

Are you sure you want to delete this enquiry?

Cancel Delete

STEP 11: REPORT

CREATE A REPORT

Choose Your Tour

Leave Feedback Days left in trial: **26** [Buy Now](#)

Home Leads Accounts Contacts Opportunities Calendar Forecasts Dashboards Reports Quotes enquiries More

Reports

Recent
3 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Marketing Exec Leads by Source	Sales and Marketing Reports	RAJA.S	18/10/2023, 3:15 pm	[icon]	
Created by Me	Sales Person Activity	Sales and Marketing Reports	RAJA.S	18/10/2023, 3:15 pm	[icon]	
Private REPORTS	Sales Exac Pipeline	Sales and Marketing Reports	RAJA.S	18/10/2023, 3:15 pm	[icon]	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						

To Do List

STEP 12 CREATE DASHBOARD

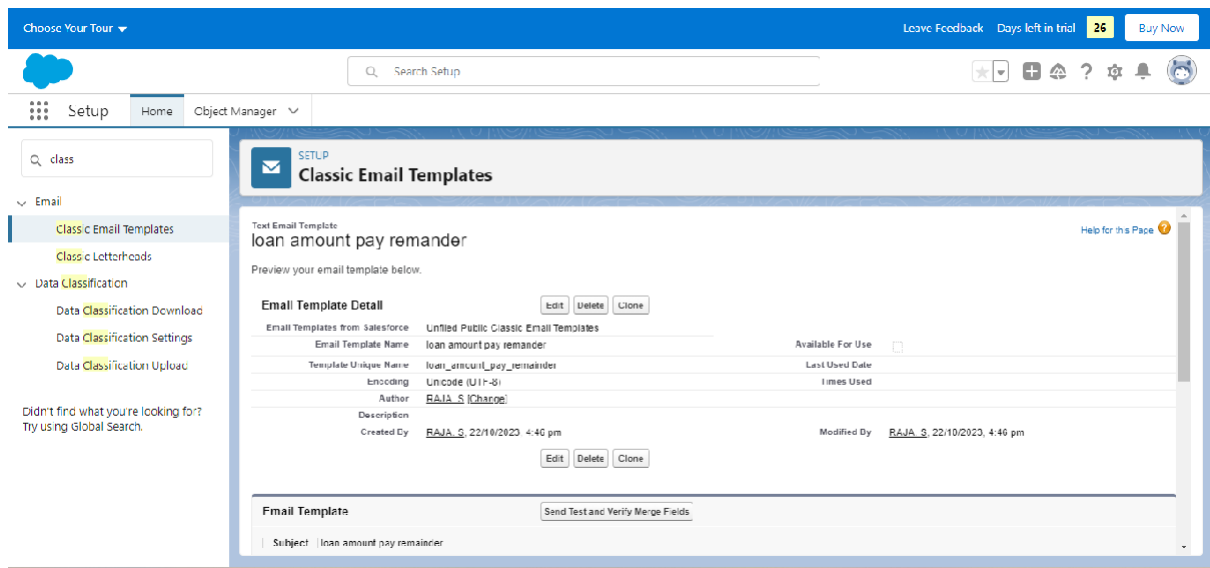
The screenshot displays the Salesforce Lightning Experience interface. At the top, there's a navigation bar with the Salesforce logo, a search bar, and a 'Choose Your Tour' dropdown. Below this is a sidebar with navigation links: 'property management', 'enquiries', 'properties', 'loans', and 'Dashboards'. The main content area shows a dashboard titled 'summy' with two reports:

- Sample Report: Users Logged In**: A bar chart showing the number of users logged in. The Y-axis is labeled 'Sum of Value' and ranges from 0 to 1. The X-axis is labeled 'Username' and shows the user 'rajes.vu20.me-4p@p@force.com'. The bar height is 1.
- Sample Report: # of Reports**: A donut chart showing the record count. The center of the donut displays the number '143'. The Y-axis is labeled 'Record Count' and ranges from 0 to 1. The X-axis is labeled 'Created Date' and shows the date 'October 2023'.

The dashboard is titled 'summy' and has a 'Component' button. The interface also includes a 'Leave Feedback' button and a 'Days left in trial' indicator showing 26 days.

STEP13 FLOWS

CLASSIC EMAIL TEMPLATE



The screenshot shows the Salesforce Classic Email Template setup page. The top navigation bar includes "Choose Your Tour", "Leave Feedback", "Days left in trial 26", and a "Buy Now" button. The left sidebar shows the "Setup" menu with "Email" expanded, listing "Classic Email Templates", "Classic Letterheads", and "Data Classification". The main content area is titled "Classic Email Templates" and shows a preview of an email template named "loan amount pay reminder". The "Email Template Detail" section includes fields for "Email Template Name", "Template Unique Name", "Encoding", "Author", "Description", and "Created By". The "Email Template" section at the bottom shows the subject line "loan amount pay reminder".

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search Setup

Setup Home Object Manager ▾

class

Email

- Classic Email Templates
- Classic Letterheads
- Data Classification
 - Data Classification Download
 - Data Classification Settings
 - Data Classification Upload

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

SETUP Classic Email Templates

Text Email Template: loan amount pay reminder

Preview your email template below.

Help for this Page

Email Template Detail

Edit Delete Clone

Email Templates from Salesforce	Untitled Public Classic Email Templates	Available For Use	<input type="checkbox"/>
Email Template Name	loan amount pay reminder	Last Used Date	
Template Unique Name	loan_amount_pay_reminder	Times Used	
Encoding	Unicode (UTF-8)		
Author	RAJA_S (Chango)		
Description			
Created By	RAJA_S 22/10/2023 4:46 pm	Modified By	RAJA_S 22/10/2023 4:46 pm

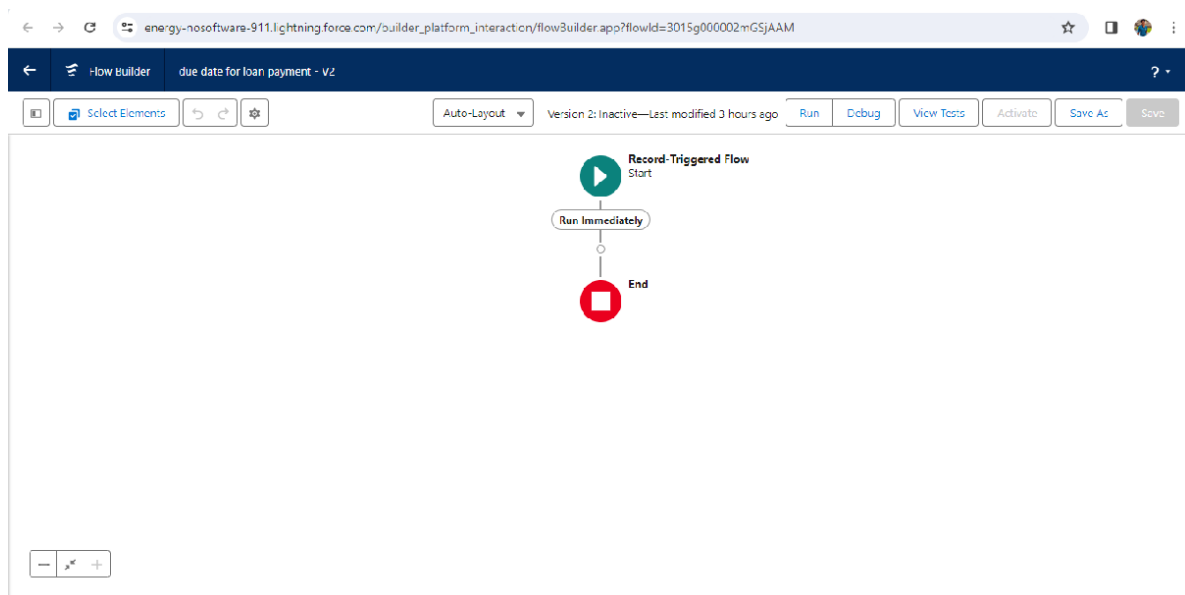
Edit Delete Clone

Email Template

Send Test and Verify Merge Fields

Subject: loan amount pay reminder

FLOWS



The screenshot shows the Salesforce Flow Builder interface. The top navigation bar includes the URL "energy-nosoftware-911.lightning.force.com/builder_platform_interact/cn/flow3builder.app?flowId=3015g000002mGSJAAM" and a "Run" button. The left sidebar shows the "Flow Builder" menu with "due date for loan payment - V2" selected. The main content area shows a flow diagram with a "Record-Triggered Flow" start node, a "Run Immediately" action node, and an "End" node. The flow is titled "due date for loan payment - V2".

energy-nosoftware-911.lightning.force.com/builder_platform_interact/cn/flow3builder.app?flowId=3015g000002mGSJAAM

Flow Builder due date for loan payment - V2

Select Elements Auto-Layout Version 2: Inactive—Last modified 3 hours ago Run Debug View Tests Activate Save As Save

Record-Triggered Flow Start

Run Immediately

End

Home | Salesforce | sunny | Salesforce | Flows | Salesforce | due date for loan payment - V1

energy-nosofware-911.lightning.force.com/builder_platform/interaction/flowBuilder.app?flowId=3015g000002mGSYAA2

Gmail YouTube Maps

Flow Builder | due date for loan payment - V1

Auto-Layout Version 1: Inactive—Last modified in a few seconds Run Debug View Tests Activate Save As Save

Select Elements

Record-Triggered Flow Start

Run Immediately

End

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:

None

CREATE THE RECORD TO TEST THE FLOW

Choose your tour Leave Feedback Days left in trial 26 Buy Now

Search...

property managem... enquiries properties loans Dashboards

loans Recently Viewed

Now Import Change Owner

Search this list...

1 item • Sorted by loan id • Updated 2 minutes ago

	loan id ↑
1	LN-0005