

1 INTRODUCTION

1.1 Overview

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

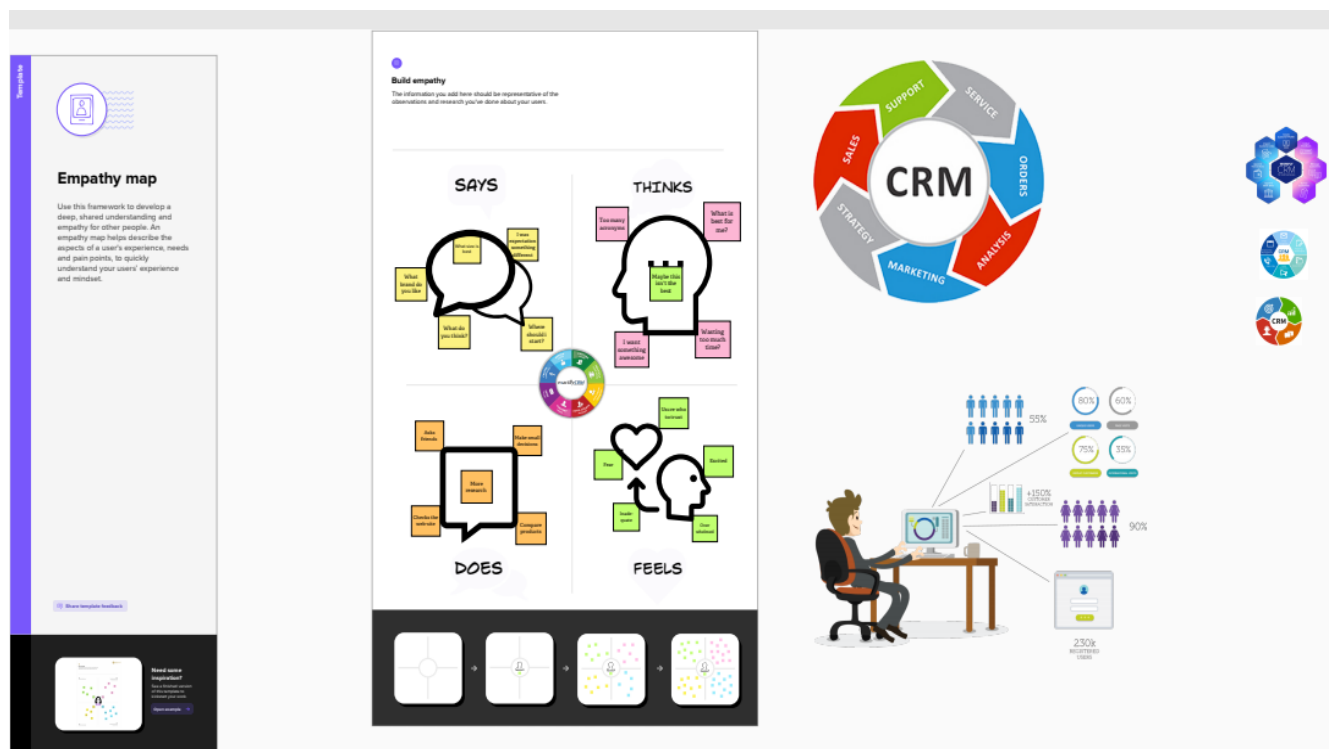
1.2 Purpose

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.

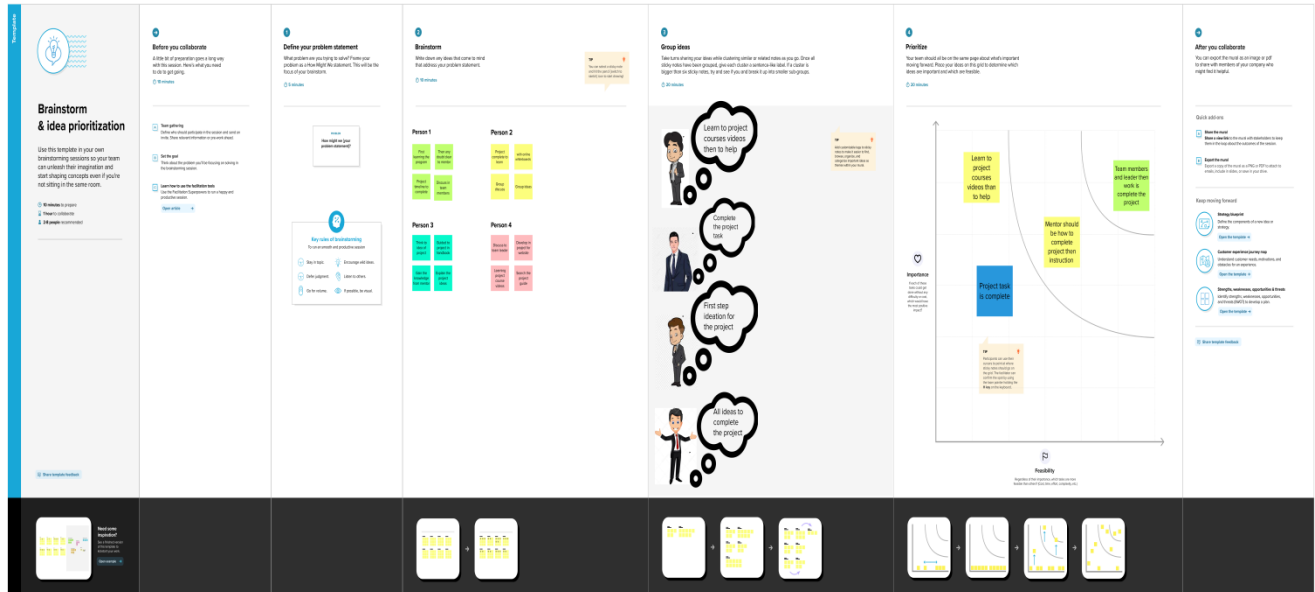
Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

2 Problem Definition & Design Thinking

2.1 Empathy map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model

| Object name | Field in the Object | | | | | | | | | | |
|---------------------------------------|--|-------------|-----------|--------------|-----------|--------------|-----------------------------|--------------------|-----------------|--------------|-----------------|
| Object 1 School | <table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Address</td><td>Text Area</td></tr> <tr> <td>Phone Number</td><td>Phone</td></tr> <tr> <td>Number of students</td><td>Roll-up-summary</td></tr> <tr> <td>Highest mark</td><td>Roll-up-summary</td></tr> </table> | Field label | Data type | Address | Text Area | Phone Number | Phone | Number of students | Roll-up-summary | Highest mark | Roll-up-summary |
| Field label | Data type | | | | | | | | | | |
| Address | Text Area | | | | | | | | | | |
| Phone Number | Phone | | | | | | | | | | |
| Number of students | Roll-up-summary | | | | | | | | | | |
| Highest mark | Roll-up-summary | | | | | | | | | | |
| Object 2 Student | <table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Phone Number</td><td>Phone</td></tr> <tr> <td>School</td><td>Master-Details Relationship</td></tr> <tr> <td>Result</td><td>Picklist</td></tr> <tr> <td>Class</td><td>Number</td></tr> </table> | Field label | Data type | Phone Number | Phone | School | Master-Details Relationship | Result | Picklist | Class | Number |
| Field label | Data type | | | | | | | | | | |
| Phone Number | Phone | | | | | | | | | | |
| School | Master-Details Relationship | | | | | | | | | | |
| Result | Picklist | | | | | | | | | | |
| Class | Number | | | | | | | | | | |

| | | |
|--------------------------------------|-----------------------|------------------|
| Object 3 Parent | Field label | Data type |
| | Parent Address | Text Area |
| | Parent Number | Phone |

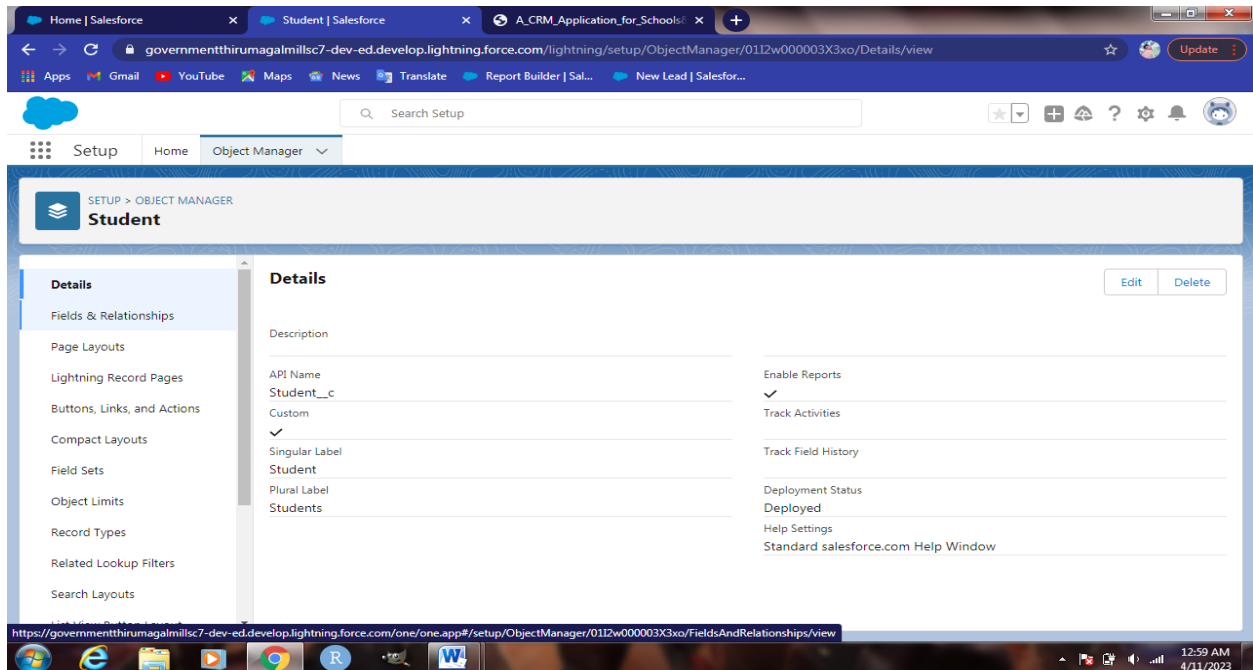
Milestone-1:Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Activity-1: Creation of School Object

The screenshot shows the Salesforce Object Manager interface for the 'School' object. The browser address bar indicates the URL: `governmentthirumagalmlsc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X3w/Details/view`. The interface includes a navigation menu on the left with options like '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', and 'List View Button Layout'. The main content area displays the 'Details' for the 'School' object, including fields like 'API Name' (School__c), 'Custom' (checked), 'Singular Label' (School), 'Plural Label' (Schools), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings', and 'Standard salesforce.com Help Window'. The 'Edit' and 'Delete' buttons are visible in the top right corner of the details section.

Activity 2: Create student object

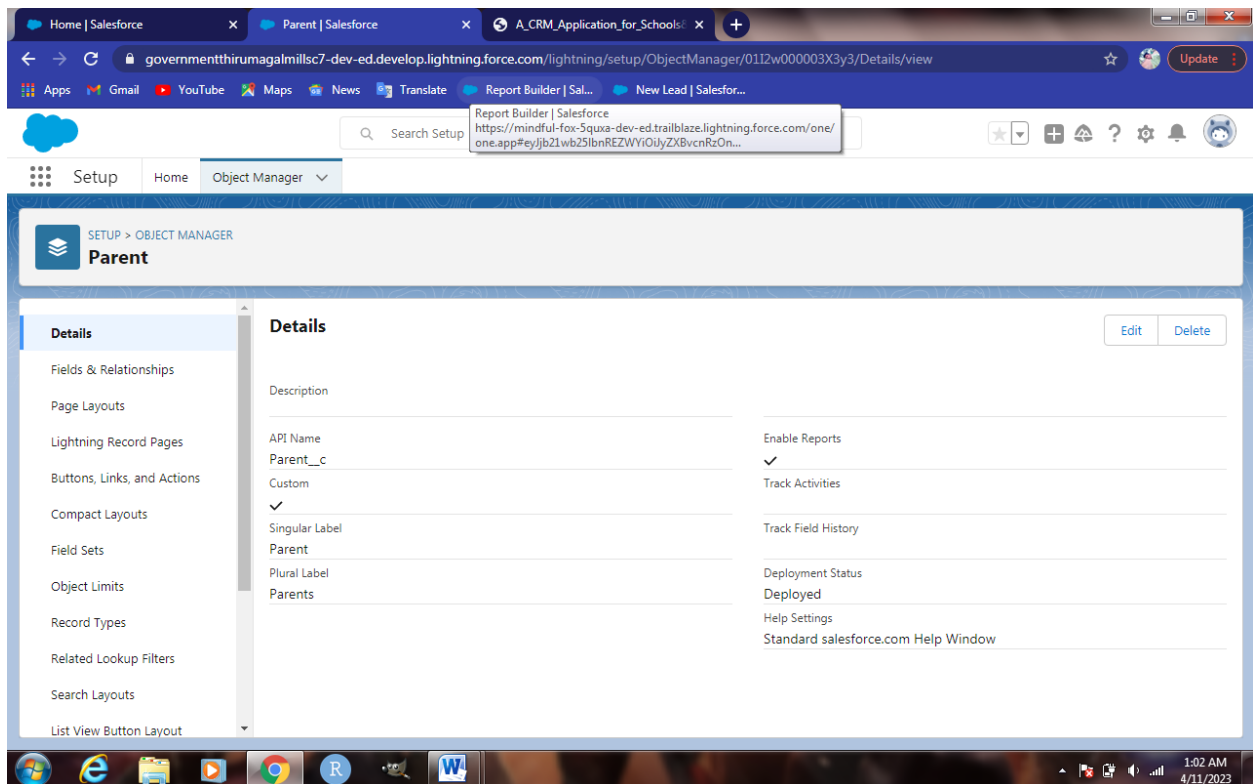


This screenshot shows the Salesforce Setup interface for the 'Student' object. The browser address bar displays the URL: `governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X3xo/Details/view`. The page title is 'Student' under the 'SETUP > OBJECT MANAGER' breadcrumb. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area, titled 'Details', includes a description field and a table of configuration options:

| Field Name | Value |
|---------------------|-------------------------------------|
| API Name | Student__c |
| Custom | Custom |
| Singular Label | Student |
| Plural Label | Students |
| Enable Reports | <input checked="" type="checkbox"/> |
| Track Activities | <input type="checkbox"/> |
| Track Field History | <input type="checkbox"/> |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |

The bottom of the screen shows the Windows taskbar with various application icons and a system clock indicating 12:59 AM on 4/11/2023.

Activity 3: Create parent object



This screenshot shows the Salesforce Setup interface for the 'Parent' object. The browser address bar displays the URL: `governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X3y3/Details/view`. The page title is 'Parent' under the 'SETUP > OBJECT MANAGER' breadcrumb. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area, titled 'Details', includes a description field and a table of configuration options:

| Field Name | Value |
|---------------------|-------------------------------------|
| API Name | Parent__c |
| Custom | Custom |
| Singular Label | Parent |
| Plural Label | Parents |
| Enable Reports | <input checked="" type="checkbox"/> |
| Track Activities | <input type="checkbox"/> |
| Track Field History | <input type="checkbox"/> |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |

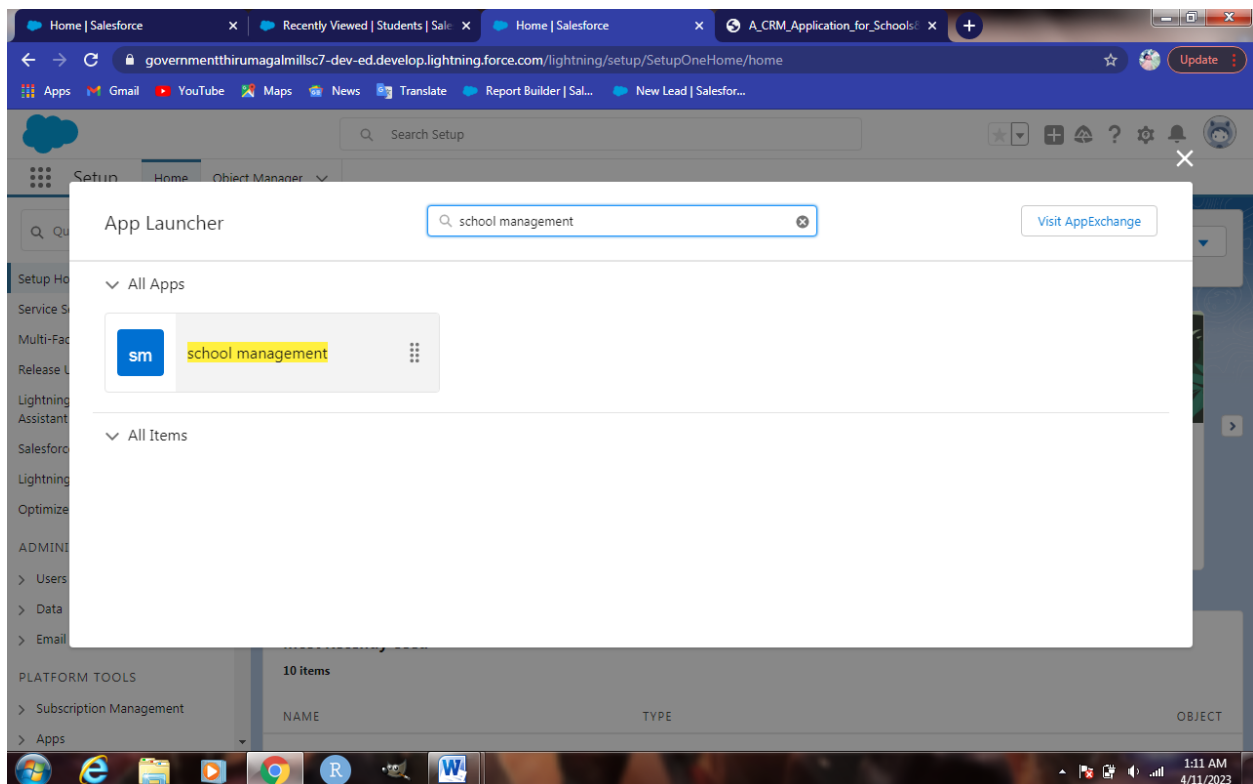
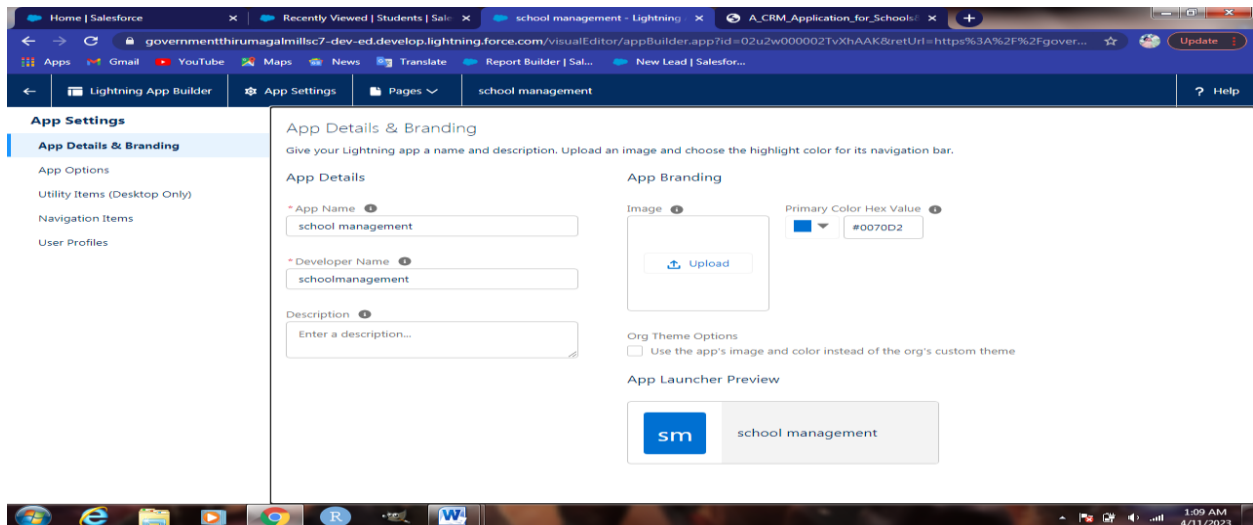
The bottom of the screen shows the Windows taskbar with various application icons and a system clock indicating 1:02 AM on 4/11/2023.

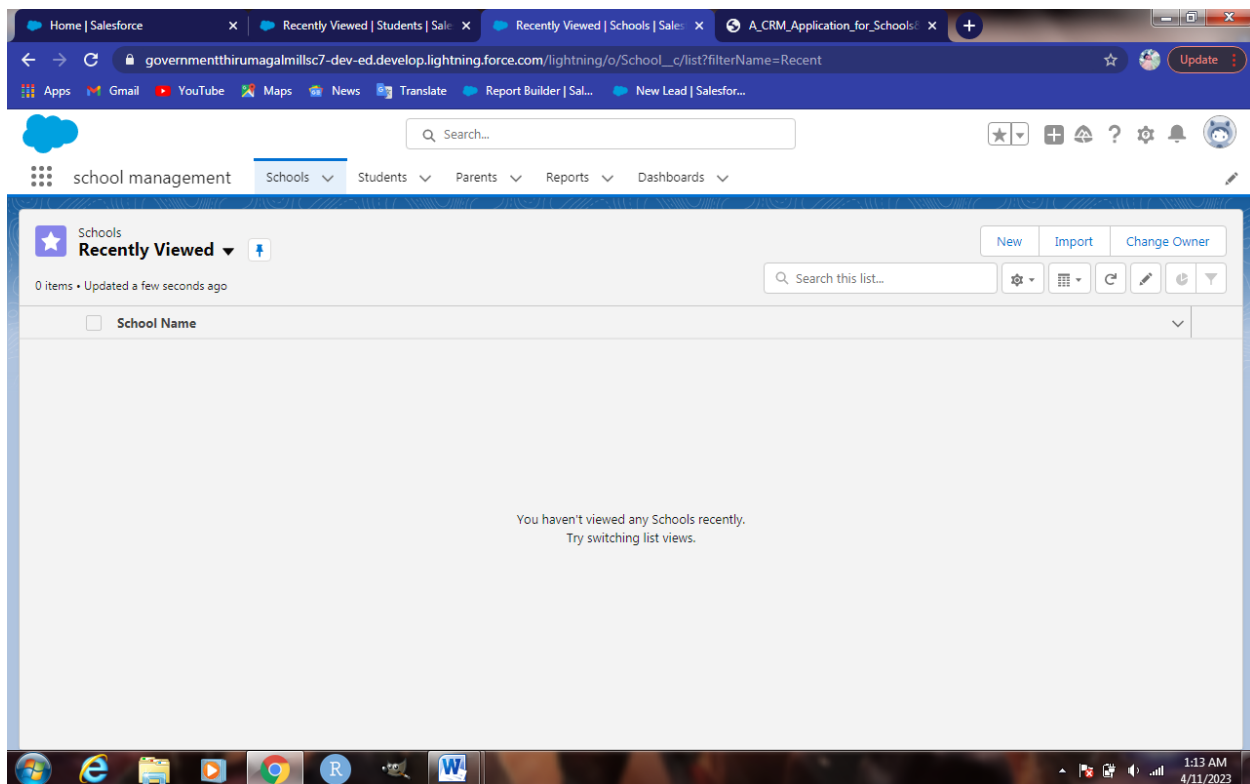
Milestone-2:Lightning App

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs

Activity:

Create the School Management app





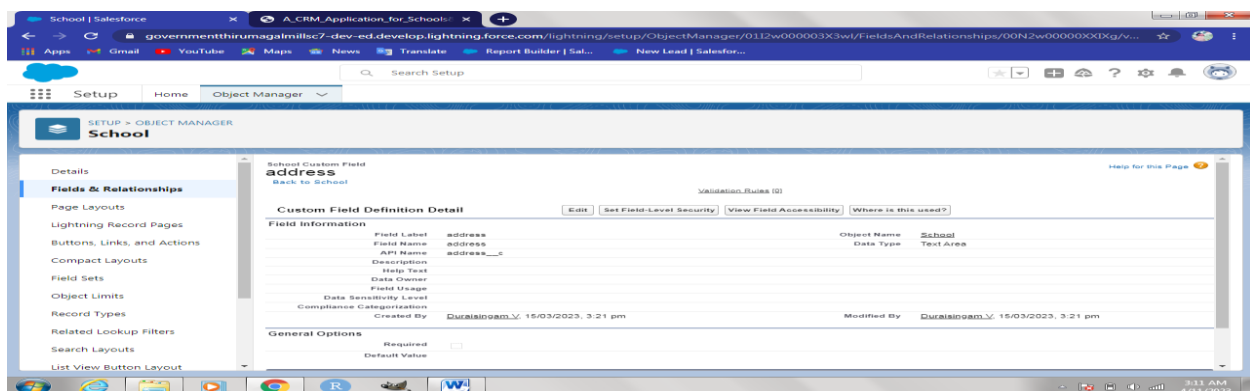
Milestone -3: Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Activity-1:

Creation of fields for the School objects:

Address:



Phone Number

The screenshot shows the Salesforce Setup interface for a custom field named 'Phone Number'. The browser address bar indicates the URL is `governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003X3wl/FieldsAndRelationships/00N2w00000XXlh9/vi...`. The left sidebar shows the 'Object Manager' menu with 'Fields & Relationships' selected. The main content area displays the 'Phone Number' custom field definition for the 'School' object. The field is of type 'Phone' and is not required. The 'Field Information' section shows the field label as 'Phone Number', field name as 'Phone_Number', and API name as 'Phone_Number__c'. The 'General Options' section shows the 'Required' checkbox is unchecked. The 'Created By' and 'Modified By' fields both show 'Duraiasingam V.' with timestamps from 15/03/2023.

School Custom Field
Phone Number
[Back to School](#)

Validation Rules (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

| | | | |
|---------------------------|-------------------------------------|-------------|-------------------------------------|
| Field Label | Phone Number | Object Name | School |
| Field Name | Phone_Number | Data Type | Phone |
| API Name | Phone_Number__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Duraiasingam V. 15/03/2023, 3:27 pm | Modified By | Duraiasingam V. 15/03/2023, 3:27 pm |

General Options

Required ☐

Default Value

Number of students:

The screenshot shows the Salesforce Setup interface for a custom field named 'Number of students'. The browser address bar indicates the URL is `governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003X3wl/FieldsAndRelationships/00N2w00000...`. The left sidebar shows the 'Object Manager' menu with 'Fields & Relationships' selected. The main content area displays the 'Number of students' custom field definition for the 'School' object. The field is of type 'Number' and is not required. The 'Field Information' section shows the field label as 'Number of students', field name as 'Number_of_students', and API name as 'Number_of_students__c'. The 'General Options' section shows the 'Required', 'Unique', and 'External ID' checkboxes are all unchecked. The 'Created By' and 'Modified By' fields both show 'Duraiasingam V.' with timestamps from 15/03/2023.

School Custom Field
Number of students
[Back to School](#)

Validation Rules (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

| | | | |
|---------------------------|-------------------------------------|-------------|-------------------------------------|
| Field Label | Number of students | Object Name | School |
| Field Name | Number_of_students | Data Type | Number |
| API Name | Number_of_students__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Duraiasingam V. 15/03/2023, 3:41 pm | Modified By | Duraiasingam V. 15/03/2023, 3:41 pm |

General Options

Required ☐

Unique ☐

External ID ☐

Highest Marks:

The screenshot shows the Salesforce Setup interface for a custom field named 'Highest marks' on the 'School' object. The left sidebar contains a navigation menu with options like 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, and List View Button Layout. The main content area is titled 'School Custom Field: Highest marks' and includes a 'Back to School' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists details such as Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, and Created By. The 'General Options' section includes a 'Required' checkbox and a 'Default Value' field. The bottom of the screen shows the Windows taskbar with various application icons and the system clock.

| Field Information | | Object Name | Data Type |
|---------------------------|------------------------------------|-------------|------------------------------------|
| Field Label | Highest marks | School | Percent |
| Field Name | Highest_marks | | |
| API Name | Highest_marks__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Duraisingam V. 15/03/2023, 3:45 pm | Modified By | Duraisingam V. 15/03/2023, 3:45 pm |

Activity-2:

Creation of fields for the Student objects:

Phone number:

The screenshot shows the Salesforce Setup interface for a custom field named 'Phone Number' on the 'Student' object. The left sidebar contains a navigation menu with options like 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, and List View Button Layout. The main content area is titled 'Student Custom Field: Phone Number' and includes a 'Back to Student' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists details such as Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, and Created By. The 'General Options' section includes a 'Required' checkbox and a 'Default Value' field. The bottom of the screen shows the Windows taskbar with various application icons and the system clock.

| Field Information | | Object Name | Data Type |
|---------------------------|------------------------------------|-------------|------------------------------------|
| Field Label | Phone Number | Student | Phone |
| Field Name | Phone_Number | | |
| API Name | Phone_Number__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Duraisingam V. 15/03/2023, 3:53 pm | Modified By | Duraisingam V. 15/03/2023, 3:53 pm |

School:

The screenshot shows the Salesforce Setup interface for a custom field named 'School'. The browser address bar indicates the URL: `governmentthirumagalmisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X3xo/FieldsAndRelationships/00N2w0000...`. The left sidebar shows the 'Object Manager' menu with 'Fields & Relationships' selected. The main content area displays the 'Custom Field Definition Detail' for the 'School' field. The field information table shows the following details:

| Field Information | Value |
|---------------------------|------------------------------------|
| Field Label | School |
| Field Name | School |
| API Name | School__c |
| Description | |
| Help Text | |
| Data Owner | |
| Field Usage | |
| Data Sensitivity Level | |
| Compliance Categorization | |
| Created By | Duraisingam V. 15/03/2023, 3:56 pm |
| Modified By | Duraisingam V. 15/03/2023, 3:56 pm |

The 'Master-Detail Options' section shows the following details:

| Master-Detail Options | Value |
|-----------------------|--|
| Related To | School |
| Related List Label | Students |
| Sharing Setting | Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records. |

Results:

The screenshot shows the Salesforce Setup interface for a custom field named 'Results'. The browser address bar indicates the URL: `governmentthirumagalmisc7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X3xo/FieldsAndRelationships/00N2w0000...`. The left sidebar shows the 'Object Manager' menu with 'Fields & Relationships' selected. The main content area displays the 'Custom Field Definition Detail' for the 'Results' field. The field information table shows the following details:

| Field Information | Value |
|---------------------------|------------------------------------|
| Field Label | Results |
| Field Name | Results |
| API Name | Results__c |
| Description | |
| Help Text | |
| Data Owner | |
| Field Usage | |
| Data Sensitivity Level | |
| Compliance Categorization | |
| Created By | Duraisingam V. 15/03/2023, 3:58 pm |
| Modified By | Duraisingam V. 15/03/2023, 3:58 pm |

The 'General Options' section shows the following details:

| General Options | Value |
|-----------------|--------------------------|
| Required | <input type="checkbox"/> |
| Default Value | 1 |

Class:

The screenshot shows the Salesforce Setup interface for the 'Student' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Student Custom Field Class' and includes a 'Back to Student' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists details for the 'Class' field:

| Field Label | Field Name | Object Name | Data Type |
|---------------------------|---------------------|---------------|---------------------|
| Class | Class | Student | Number |
| API Name | Class__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Duraisingam V. | Modified By | Duraisingam V. |
| Created Date | 15/03/2023, 3:59 pm | Modified Date | 15/03/2023, 3:59 pm |

The 'General Options' section shows 'Required' and 'Unique' checkboxes, both of which are unchecked. The browser's address bar shows the URL: <https://governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01I2w000003X3o/FieldsAndRelationships/view>. The system clock at the bottom right indicates 3:36 AM on 4/11/2023.

Activity-3:

Creation of fields for the Parent objects:

Parent Address:

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Parent Custom Field Parent address' and includes a 'Back to Parent' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists details for the 'Parent address' field:

| Field Label | Field Name | Object Name | Data Type |
|---------------------------|---------------------|---------------|---------------------|
| Parent address | Parent address | Parent | Text Area |
| API Name | Parent_address__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Duraisingam V. | Modified By | Duraisingam V. |
| Created Date | 15/03/2023, 4:02 pm | Modified Date | 15/03/2023, 4:02 pm |

The 'General Options' section shows 'Required' and 'Default Value' checkboxes, both of which are unchecked. The browser's address bar shows the URL: <https://governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01I2w000003X3y3/FieldsAndRelationships/view>. The system clock at the bottom right indicates 3:39 AM on 4/11/2023.

Parent Number:

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The 'Parent Custom Field' page is displayed, showing the 'Parent Number' field definition. The field is a Phone type, with API Name 'Parent_Number__c' and Object Name 'Parent'. The field is required and has a default value. The page also shows the 'General Options' section with a 'Required' checkbox and a 'Default Value' field.

| Field Information | Field Label | Parent Number | Object Name | Parent |
|---------------------------|------------------|---------------------|-------------|---------------------|
| Field Name | Parent_Number | | Data Type | Phone |
| API Name | Parent_Number__c | | | |
| Description | | | | |
| Help Text | | | | |
| Data Owner | | | | |
| Field Usage | | | | |
| Data Sensitivity Level | | | | |
| Compliance Categorization | | | | |
| Created By | Duraisingam V. | 15/03/2023, 4:03 pm | Modified By | Duraisingam V. |
| | | | | 15/03/2023, 4:03 pm |

Milestone-4: Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A 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

Activity:

Creation on profile:

The screenshot shows the Salesforce Setup interface for the 'School profile'. The 'Profile Edit' page is displayed, showing the 'School profile' with a 'Salesforce' user license. The 'Custom App Settings' section is visible, showing a table of settings for various Salesforce applications.

| Custom App Settings | Visible | Default |
|---|-------------------------------------|--------------------------|
| All Tabs (standard__AllTabSet) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Analytics Studio (standard__Insights) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| App Launcher (standard__AppLauncher) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Both Solutions (standard__LightningBolt) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Sales (standard__Sales) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Sales Console (standard__LightningSalesConsole) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Salesforce Chatter (standard__Chatter) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Salesforce Scheduler Setup (standard__LightningScheduler) | <input type="checkbox"/> | <input type="checkbox"/> |

Milestone-5: Users

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.

Activity:

Creating a Users:

Milestone-6:Permission sets

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.

Activity-1:

Permission sets 1:

Permission Sets | Salesforce x A_CRM_Application_for_Schools: x

governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp...

Click to go back, hold to see history Maps News Translate Report Builder | Sal... New Lead | Salesfor...

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Permission Sets

Clone: teacher permission

Enter a new label and description for the cloned permission set.

Save Cancel

Enter permission set information

Label teacher permission

API Name teacher_permission

Description

Session Activation Required ☐

License

Save Cancel

9:15 AM 4/11/2023

Permission Sets | Salesforce x A_CRM_Application_for_Schools: x

governmentthirumagalmlisc7-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000008gfA4

Apps Gmail YouTube Maps News Translate Report Builder | Sal... New Lead | Salesfor...

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Permission Sets

teacher permission

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

| | | | |
|-----------------------------|------------------------------------|------------------|------------------------------------|
| Description | License | API Name | teacher_permission |
| Session Activation Required | <input type="checkbox"/> | Namespace Prefix | |
| Last Modified By | Duraisingam V. 16/03/2023, 9:09 am | Created By | Duraisingam V. 16/03/2023, 9:09 am |

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

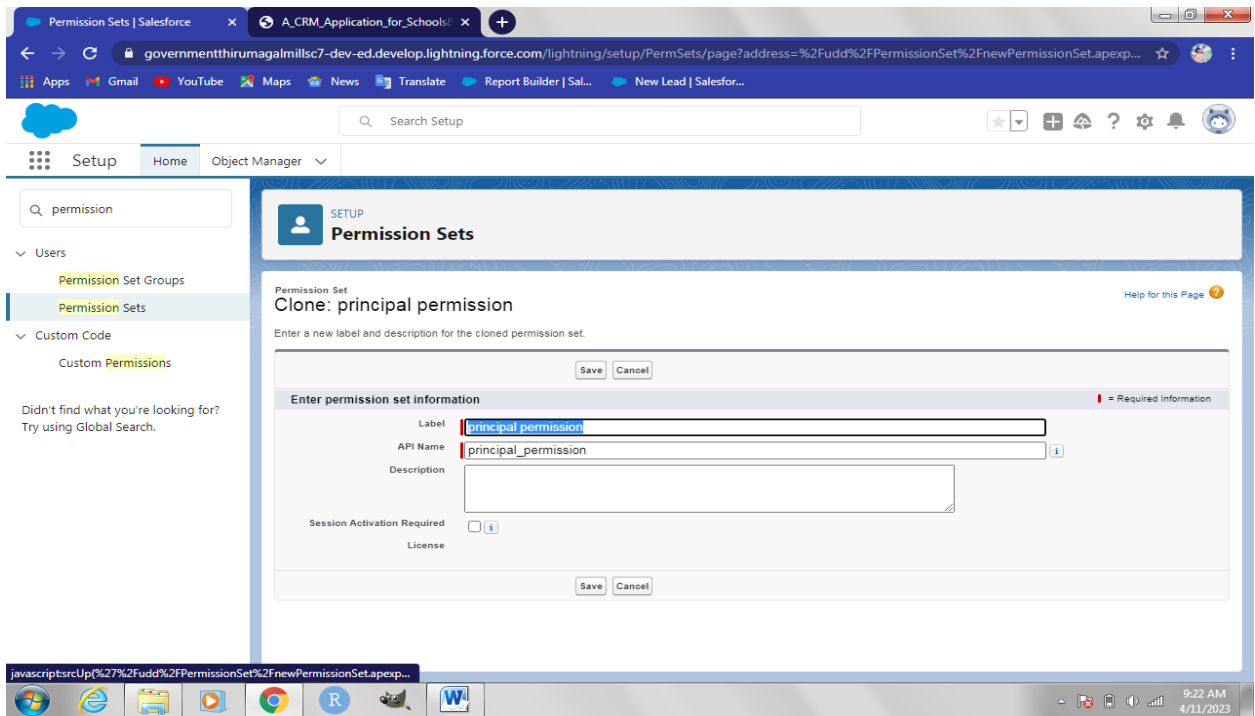
Apex Class Access
Permissions to execute Apex classes

javascriptsrcUp(%27%2F0PS2w000008gfA4%3Fadtp%3Dp1%27);

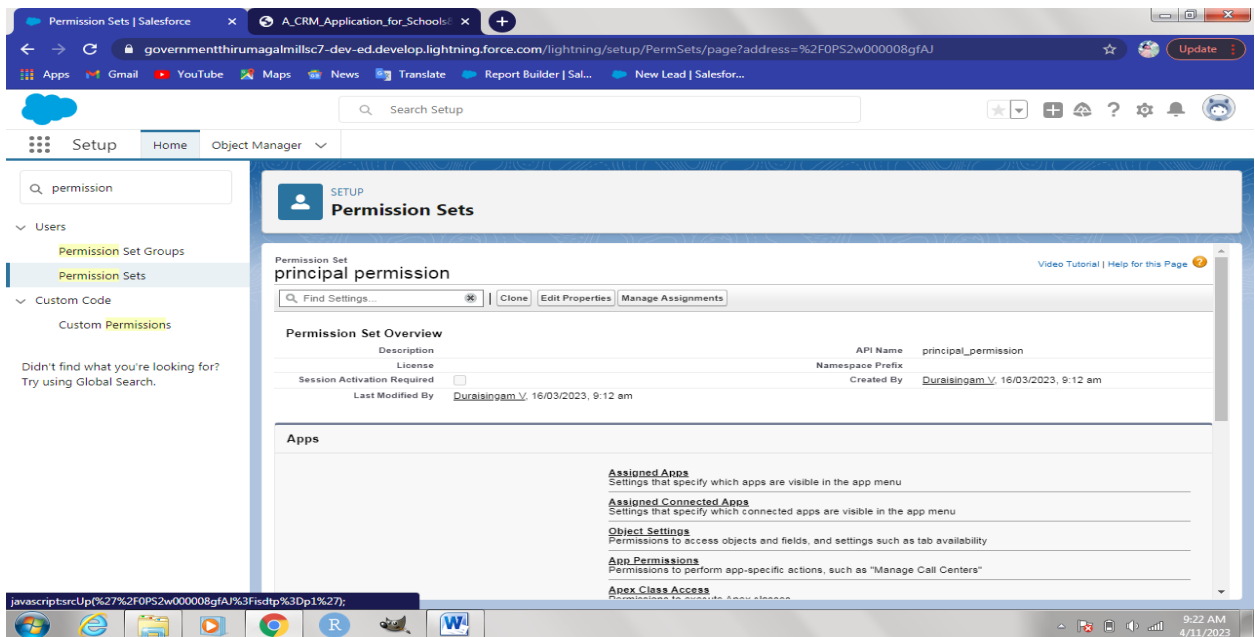
9:16 AM 4/11/2023

Activity-2:

Permission sets 2:



This screenshot shows the Salesforce Setup interface for cloning a permission set. The left sidebar contains a search bar with "permission" and a list of navigation items: Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled "SETUP Permission Sets" and shows the "Clone: principal permission" page. Below the title, there is a prompt to "Enter a new label and description for the cloned permission set." and a form titled "Enter permission set information". The form includes fields for Label (principal_permission), API Name (principal_permission), Description, Session Activation Required (unchecked), and License. Save and Cancel buttons are present at the top and bottom of the form. The browser's address bar shows the URL: governmentthirumagalmilsc7-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp...



This screenshot shows the Salesforce Setup interface for the "principal permission" permission set. The left sidebar is the same as the previous screenshot. The main content area is titled "SETUP Permission Sets" and shows the "principal permission" page. Below the title, there is a search bar with "Find Settings..." and buttons for Clone, Edit Properties, and Manage Assignments. The "Permission Set Overview" section displays the following information:

| Field | Value |
|-----------------------------|-------------------------------------|
| Description | |
| License | |
| Session Activation Required | <input type="checkbox"/> |
| Last Modified By | Duraiasingam V. 16/03/2023, 9:12 am |
| API Name | principal_permission |
| Namespace Prefix | |
| Created By | Duraiasingam V. 16/03/2023, 9:12 am |

The "Apps" section is expanded, showing the following settings:

- Assigned Apps**: Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes

The browser's address bar shows the URL: governmentthirumagalmilsc7-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000008gfAJ%3Fisdtp%3Dp1%27;

Milestone-7:Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity:

Reports :

4 Trailhead profile public URL

Team Lead - <https://trailblazer.me/id/gmathi19>

Team Member 1 – <https://trailblazer.me/id/gowtv17>

Team Member 2 – <https://trailblazer.me/id/hgahlot3>

Team Member 3 – <https://trailblazer.me/id/jajay47>

5 ADVANTAGES & DISADVANTAGES

Advantages:

- **Better Knowledge of Customers:** Customer Relationship Management is a customer-centric technique. The main focus of CRM technique is on the customers of Business. It helps businesses to acquire all required information of customers. This information is then stored and used for understanding customer behavior.
- **Retain More Customers:** It not only focuses on understanding and serving the existing customers of businesses. CRM aims at acquiring more and more customers for businesses. It targets to increase the customer base & retain them for the long term. Through CRM, a communication channel is developed between customers and business which acquires all information regarding customers.

Disadvantage:

- **Costly:** Implementation of CRM system requires huge cost to be spent by the business. CRM software are too costly as it came with different price packages as per the needs of organizations. It increases the overall expenses of business and may not be suitable for small businesses.
- **Security Issues:** Another major drawback with CRM is the insecurity of data collected and stored. All of the data collected is stored at one centralized location which has a threat of being lost or hacked by someone. Employees may add inaccurate data or manipulate figures leading to wrongful planning.
- **Third Party Access:** CRM data can be obtained and misused by other parties. There have been many cases where web hosting companies take and sells CRM data to the third party. Various sensitive data about customers may get into the wrong hands and cause loss to peoples.

6 APPLICATIONS

Salesforces to the platform developed application to solution applied areas in business logic to travel app using solution or formulas .

7 CONCLUSION

The project over all view to develop in the application on the salesforce in customer success platform and designed. Then use of object and field work on the salesforce developed in application of travel approval build on employee traveling using on dencinetion to other work space moving useful the application.

8 FUTURE SCOPE

The developer salesforce in the travel approval application developing in employee easy to convinced that the future change on advanced future put in application.

<https://trailblazer.me/id/gowtv17>