

PROJECT REPORT TABLE

INTRODUCTION

Overview

Our cloud -based CRM applications for sales, service, marketing, and more didnot require IT experts to set up or manage - simply log in and start connecting to customers in a whole new way.

Purpose

While sales force project management capabilities are limited, they do cover some core functions, including task notification and internal communications tools.

Problem Definition &Design Thinking

Empathy Map

Fit to page Page view Read aloud Add notes Print

Build empathy

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

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.

Empathy

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

"I need to TRUST you and need you to be honest in your day-to-day dealings with me and my business."

"This is not a job for everyone. It's not for physically aggressive and negative people. It's not for people who are afraid of numbers."

"You will do well if you are a self-starter, have a GREAT work ethic and can get along with others."

Thinking

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

"Dear Team, Each has a long term goal, but we must work together to reach it."

"I want to bring in sales. There are dangerous competitors and dangerous clients."

"I need to surround myself with capable and reputable people."

Doing

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

"Relies on close personal relationships for employees."

"Participates in much of the work themselves."

"I feel stressed due to tight deadlines and pressure to turn out great-looking designs."

Feeling

Other are shift focus, hormones, and emotions? What other feelings might influence their behavior?

"My employees think I'm a bit of a know-it-all. They think I'm better than them, which makes them angry."

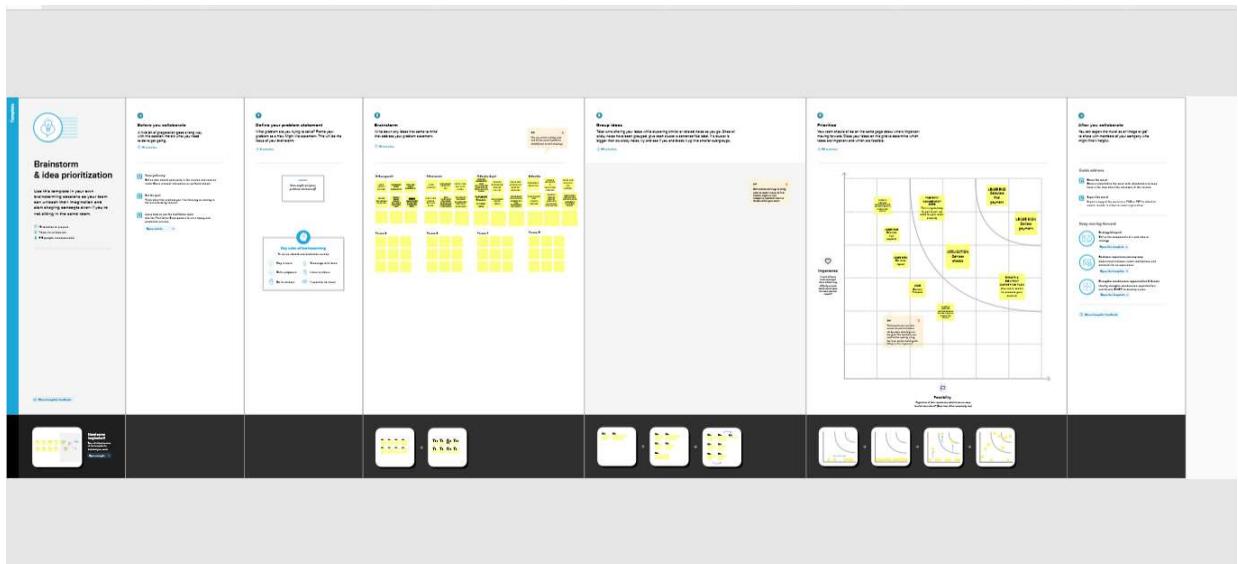
"I want us all to be successful in this job. I want them to get more."

"I feel like one of the best in the field. Increased communication and collaboration."

[Share template feedback](#)

Need some inspiration? See a finished version of this empathy map. [Open example](#)

Ideation & Brainstorming Map



RESULT:

Data Model:

1. Standard Objects

2. Custom Objects

1. Object: Lead

- Field label: State, Data type: Pick list
- Field label: City, Data type: Pick list
- Field label: Email, Data type: Email
- Field label: Phone, Data type: Phone

2. Object: Buy

- Field label: Create Property Type, Data type: Pick list
- Field label: Discount, Data type: Percentage
- Field label: State, Data type: Pick list

- Field label: City, Data type: Field Dependency

3. Object: Rent

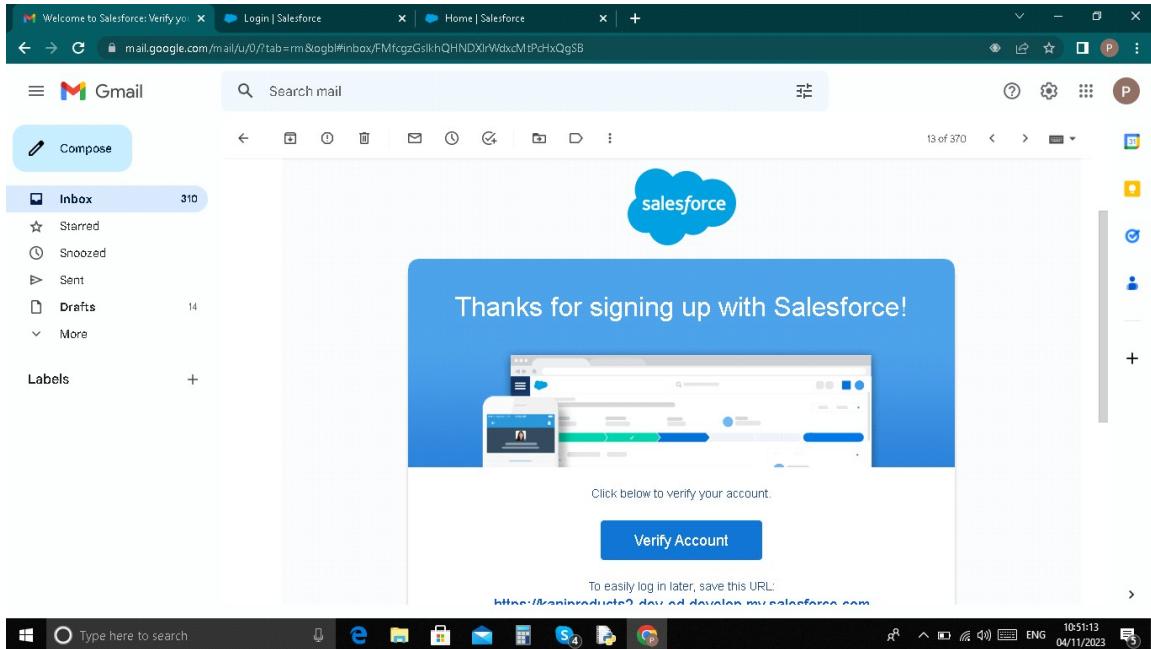
- Field label: Rent, Data type: Number
- Field label: Rental city, Data type: Text
- Field label: BHK type, Data type: Pick list

4. Object: Loan

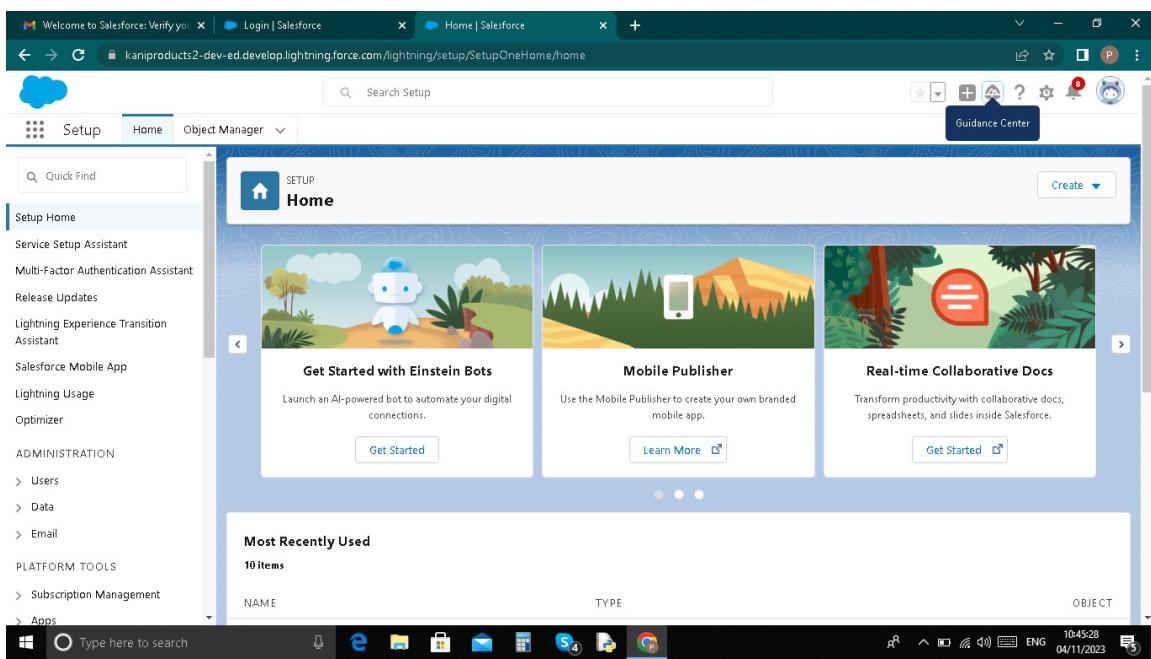
- Field label: Loan id, Data type: Number
- Field label: Interest Rate, Data type: Currency
- Field label: Term, Data type: Number
- Field label: Annual Loan, Data type: Number
- Field label: Total Loan Installments, Data type: Number
- Field label: Loan Payment, Data type: Number
- Field label: Loan Amount, Data type: Formula

Activity & Screenshot:

Go to mail->Sign up->Verify Account.

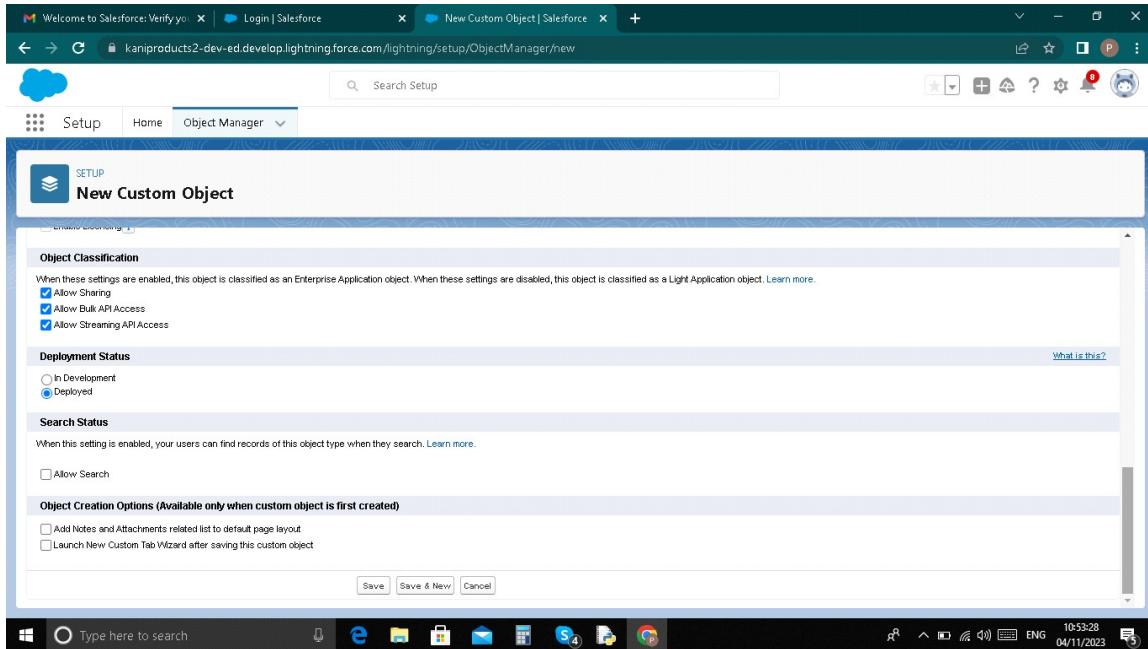


Gear Icon->Click Set Up.



Set Up-> Object Manager-> Click Great-> Click on Custom Object

Label Name, Plural Label Name,->Allow Reports->Allow Search->Save.



Lightning Tab:

Set Up->Type in Tabs->Click On Tabs->New.



Select Object->Tab Style->Next->Next->Save.

Custom Tabs

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Buyers	Cell phone	
Edit Del	Loans	Car	
Edit Del	Rents	Truck	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

Setup ->Search "App Manager"->Select->Click On New Lightning App.

Lightning Experience App Manager

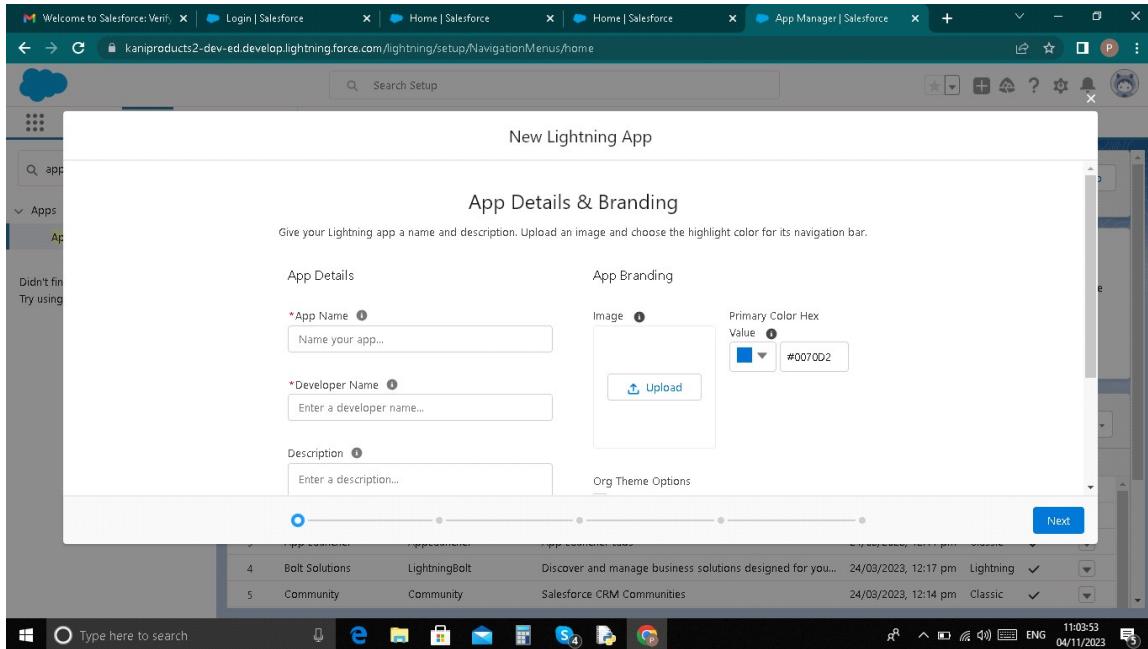
Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter '23 release notes.

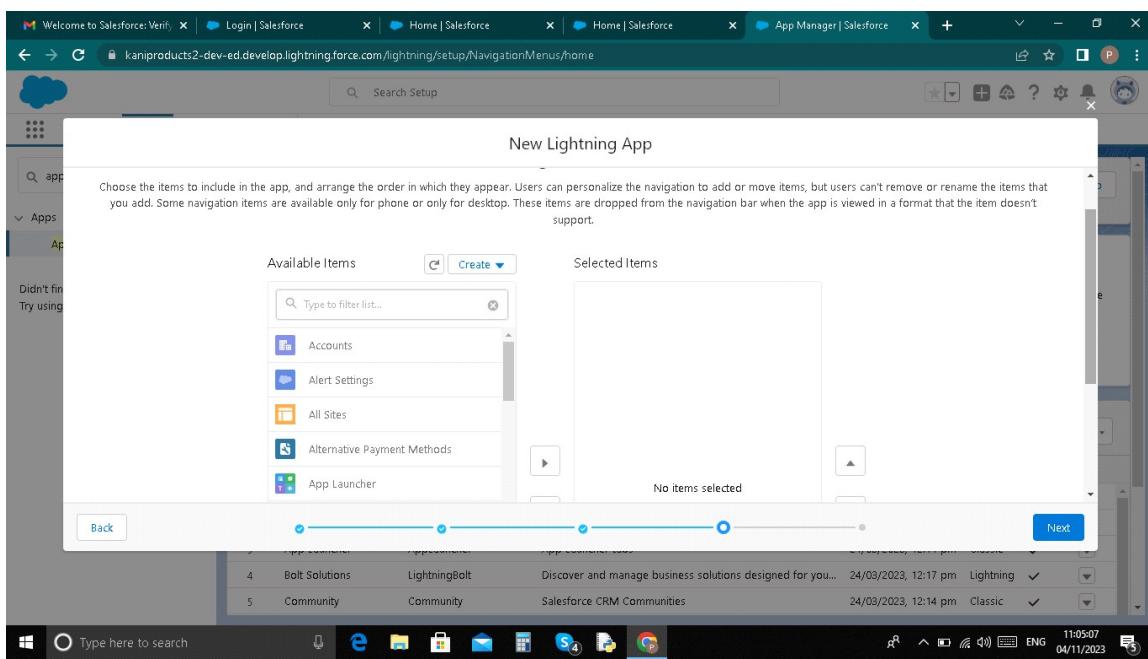
Enable App Cloning Disabled

App Name	Developer Name	Description	Last Modified	Type
All Tabs	AllTabSet		24/03/2023, 12:14 pm	Classic
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/03/2023, 12:14 pm	Classic
App Launcher	AppLauncher	App Launcher tabs	24/03/2023, 12:14 pm	Classic
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	24/03/2023, 12:17 pm	Lightning
Community	Community	Salesforce CRM Communities	24/03/2023, 12:14 pm	Classic

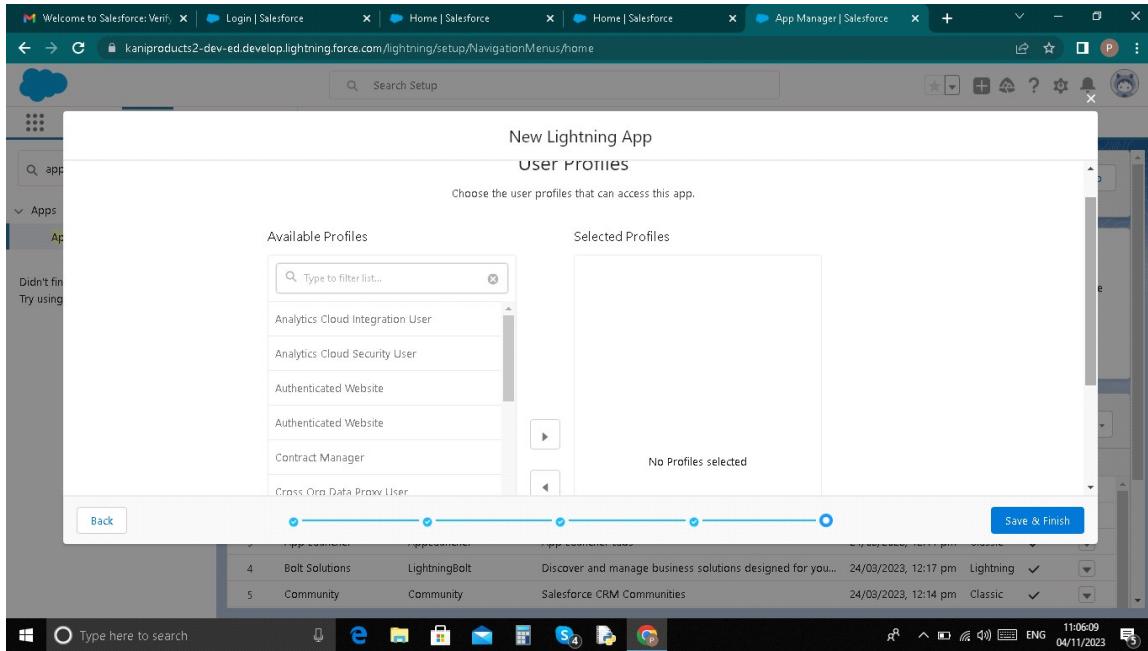
Fill The App Name as a Property
Management->Next->Next.



Using the Arrow Button -> Next

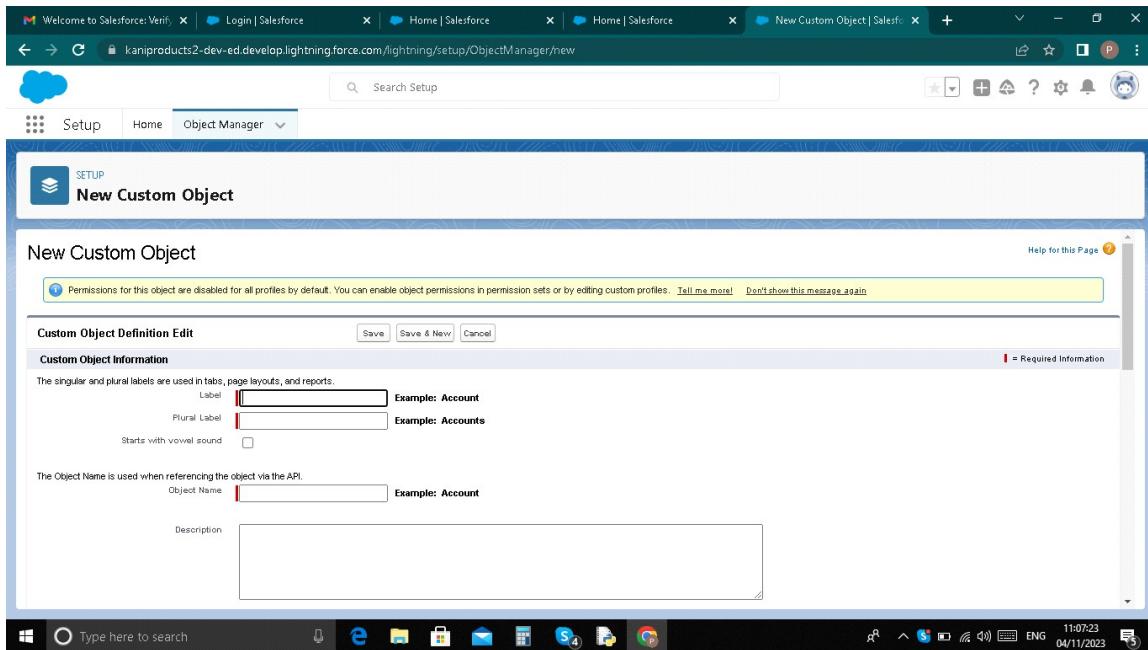


Search Profiles in search bar->Click arrow button-> Save & Finish.



Lead Field:

Go to set up-> click on object manager->object name->click on object.



Click on Field & Relationship->New.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' for the 'Buy' object. The 'Fields & Relationships' section is active, displaying a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy Name	Name	Text(80)		✓
Create Property Type	create_property_type_c	Picklist		▼
Created By	CreatedById	Lookup(User)		▼
Discount	Discount__c	Percent(18, 0)		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Owner	OwnerId	Lookup(User,Group)		✓
State	State__c	Picklist		▼

Fill the field label name lead ->Next->Next->Save.

Loan Object->Go to field & Relationship and select the formula in the field data type.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' for the 'Loan' object. A new formula field is being created, with the 'Advanced Formula' tab selected. The formula editor shows the following input:

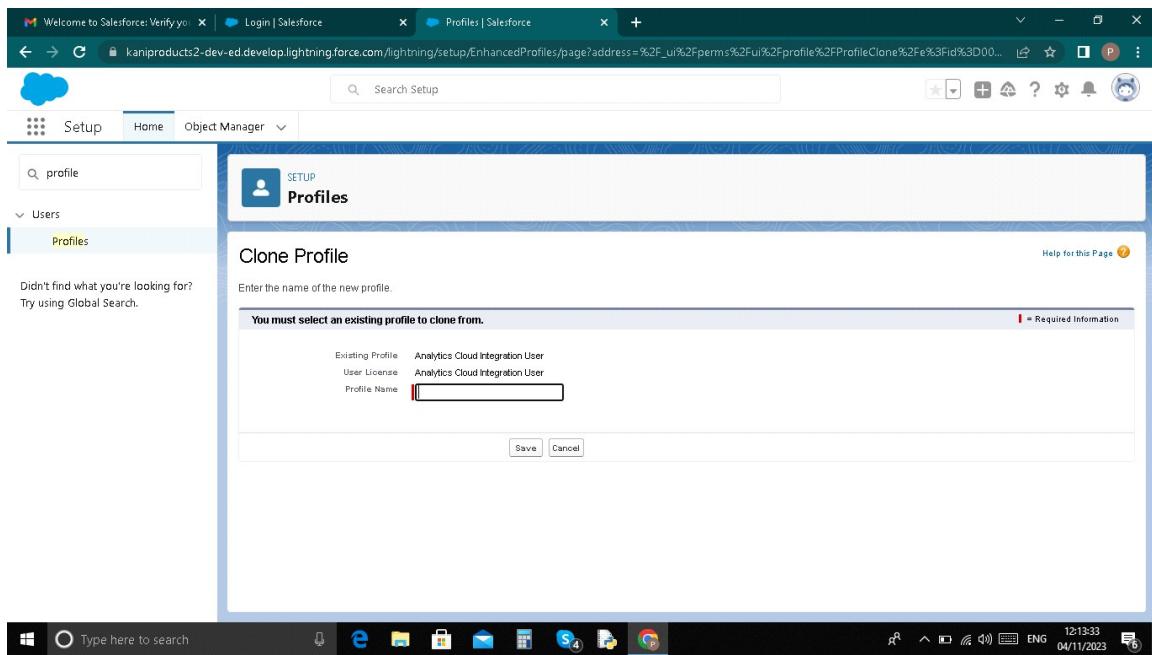
```
sales (Number) =
```

The sidebar on the right provides quick tips and a list of available functions:

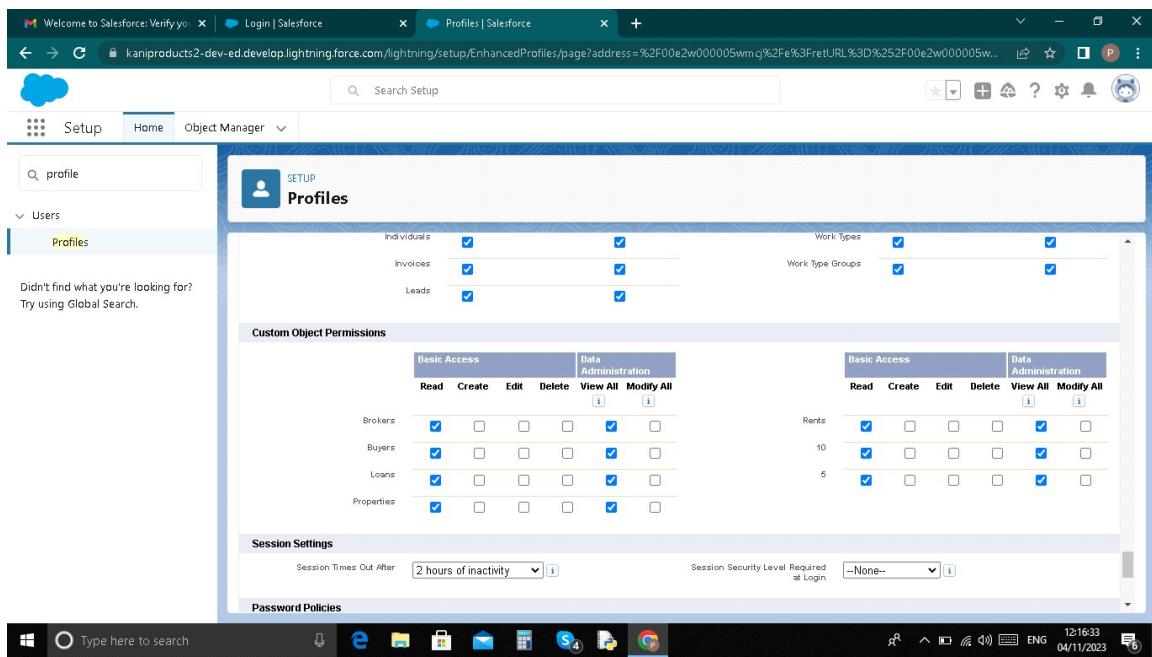
- Quick Tips:
 - Getting Started
 - Operators & Functions
- Functions:
 - ABS
 - ACOS
 - ADDMONTHS
 - AND
 - ASCII
 - ASIN

Profile:

Go to set up ->type profile->click on profile->clone the desired profile->Enter profile name-> save.

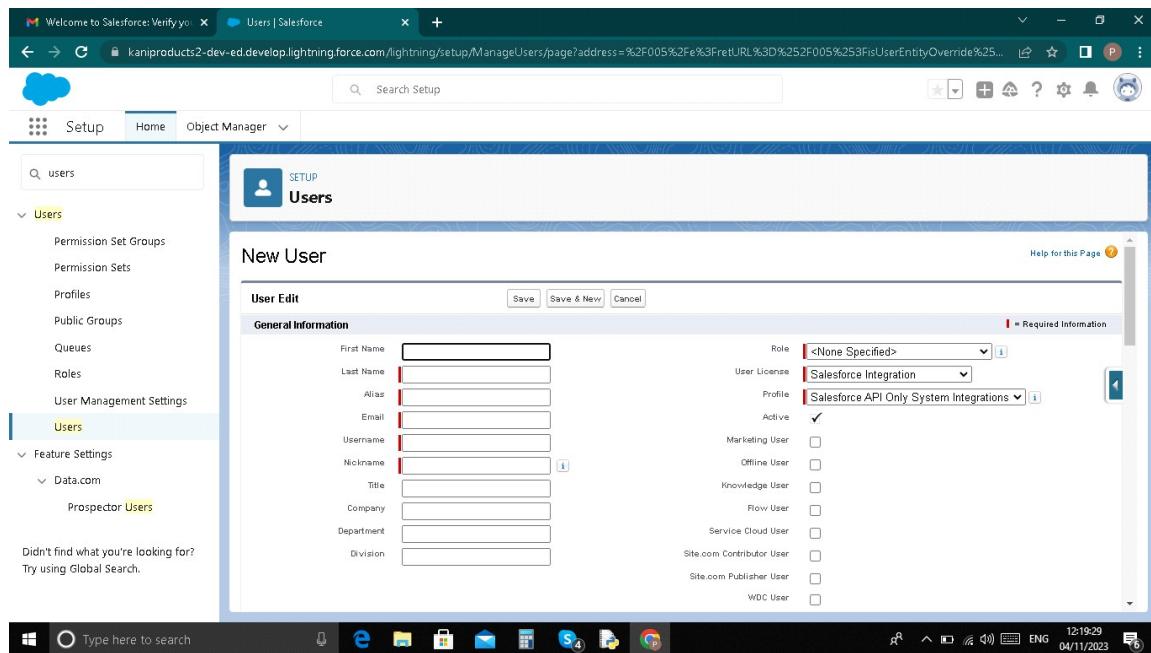


Scroll Down to Custom Object Permission to the parent profile.



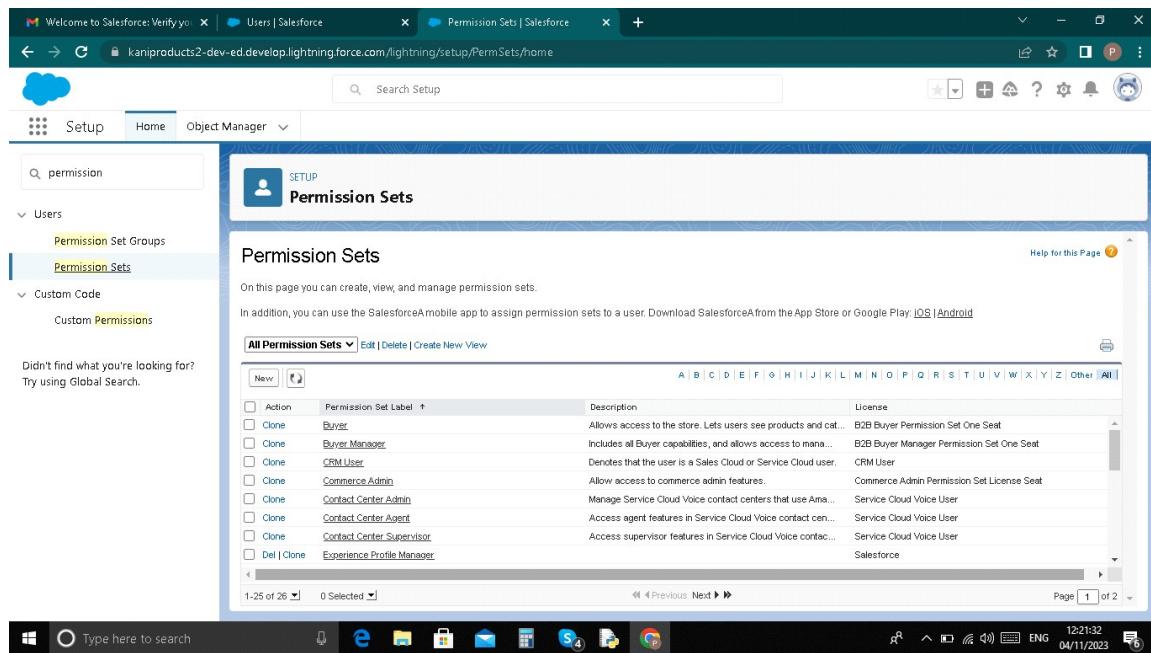
User:

Go to set up -> type user -> select users->click new user.

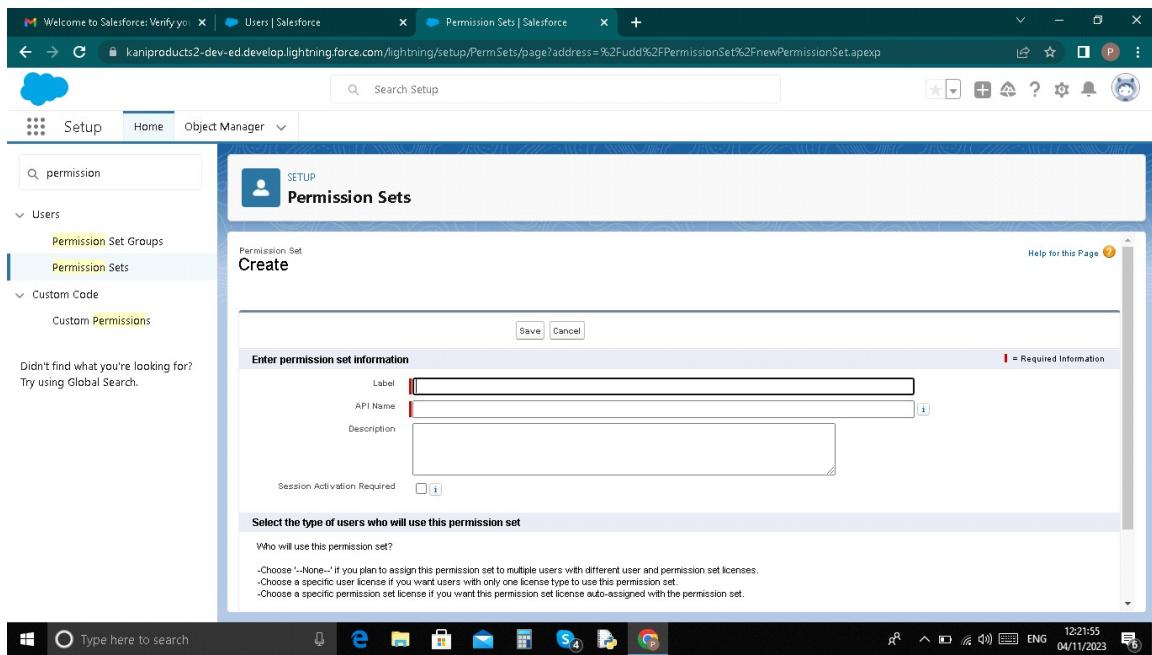


PERMISSION SETS:

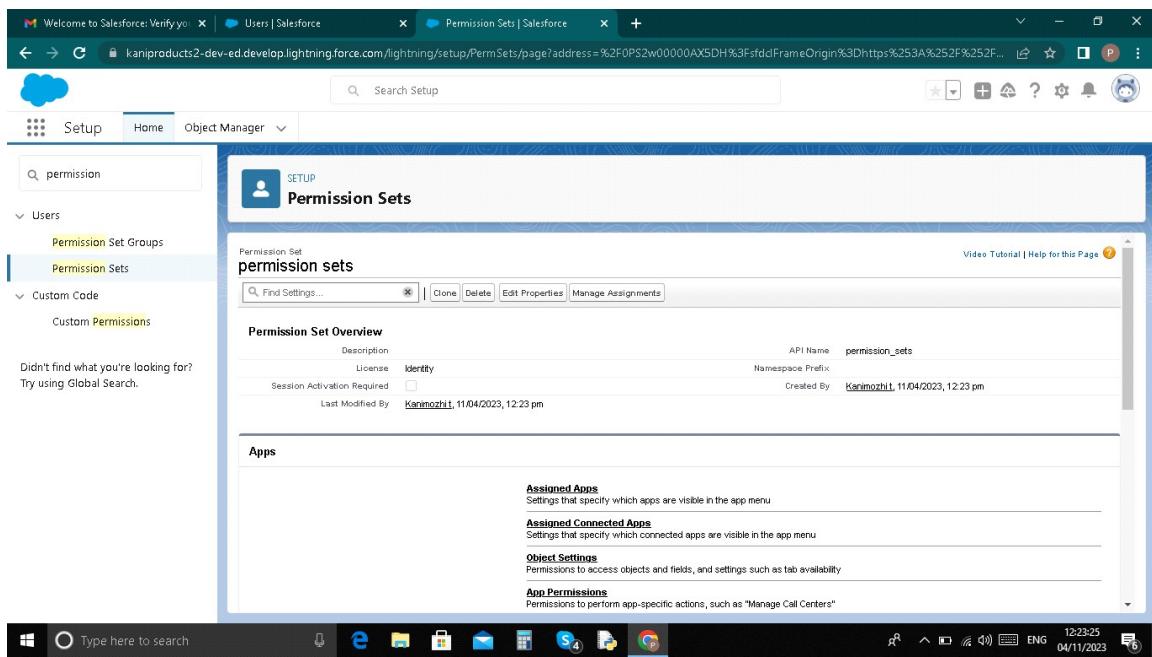
Go to set up->type permission sets->select permission sets->New



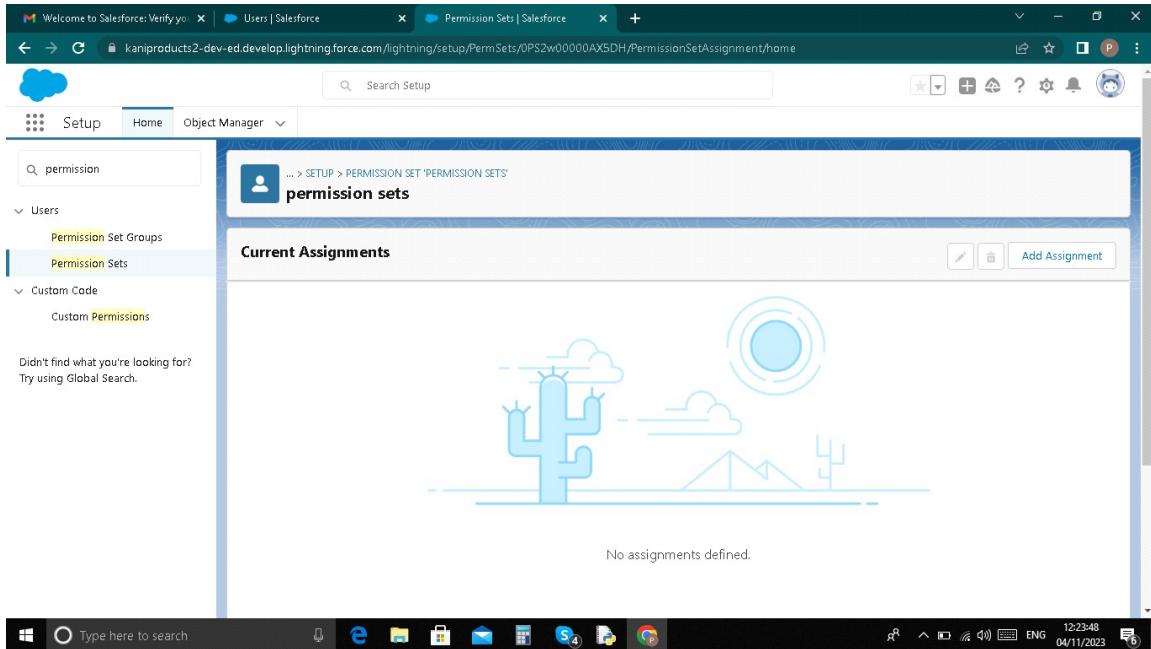
Enter label Name-> save.



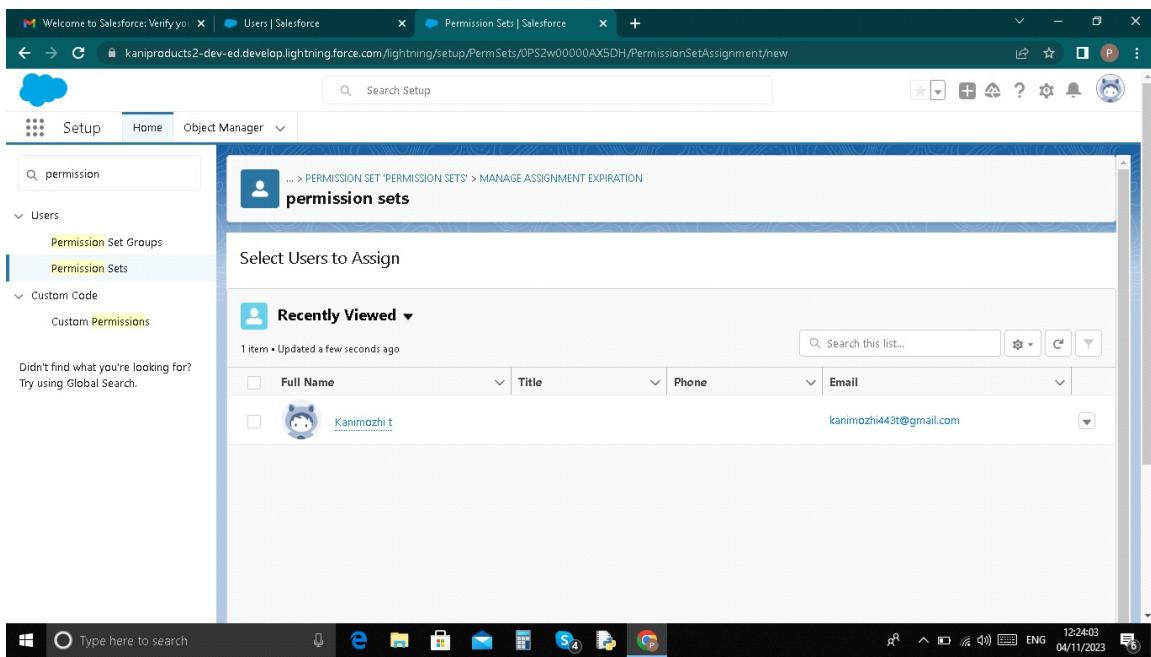
Saving the permission ->click on Manage Assignment



Click on the add assignment



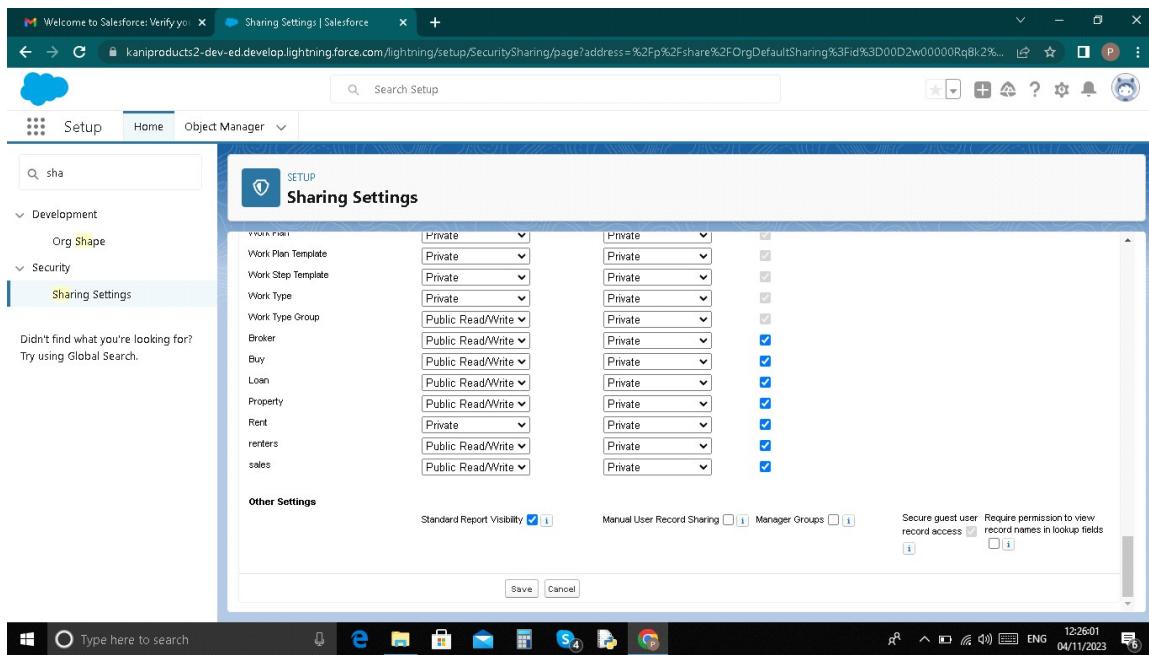
Select the users and click on save.



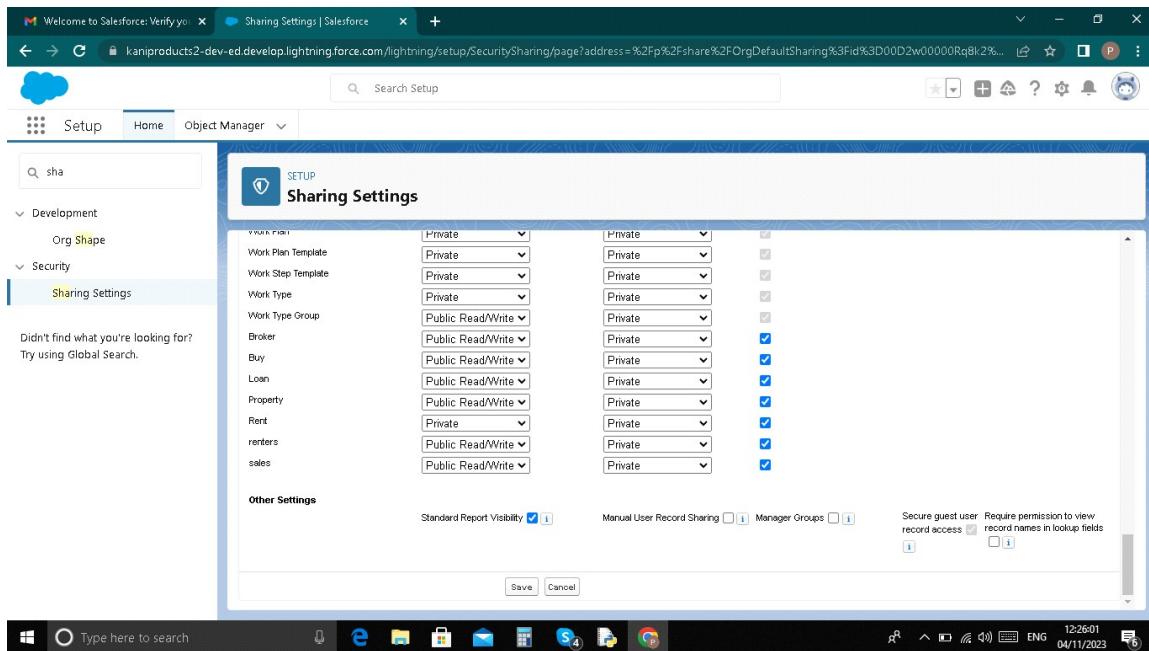
Setting for OWD:

Create OWD setting

Grant Access Using Hierarchies for Lead, Rent
custom object.



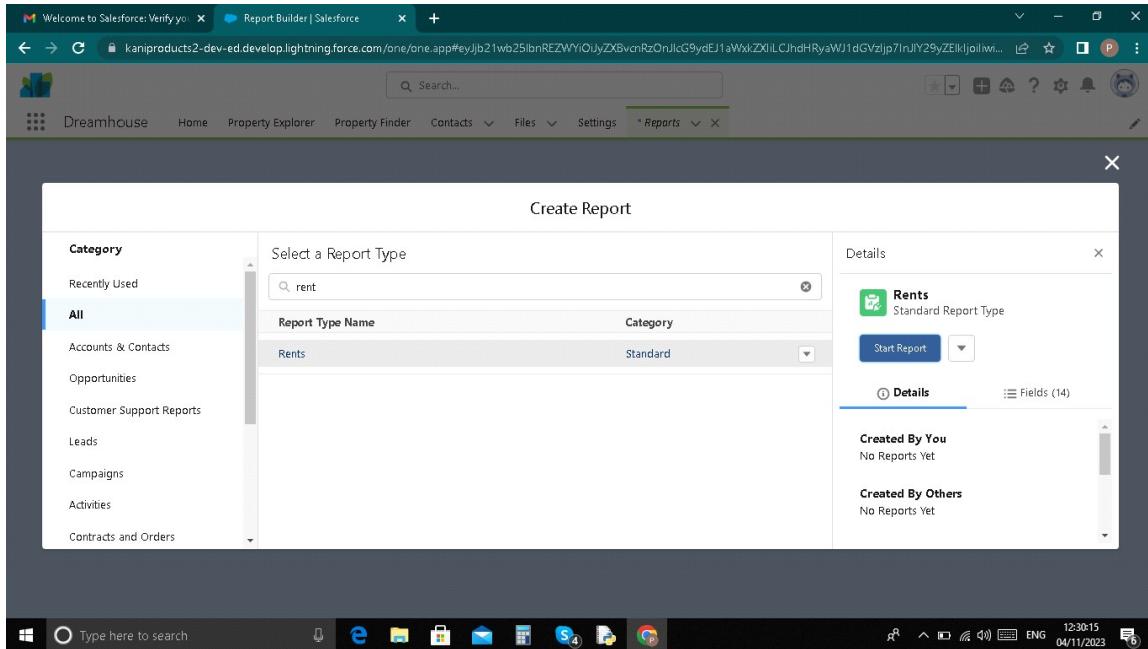
Click edit and from the drop down select private for internal and external.



REPORT:

Go to the app->click on the report tab->click new report.

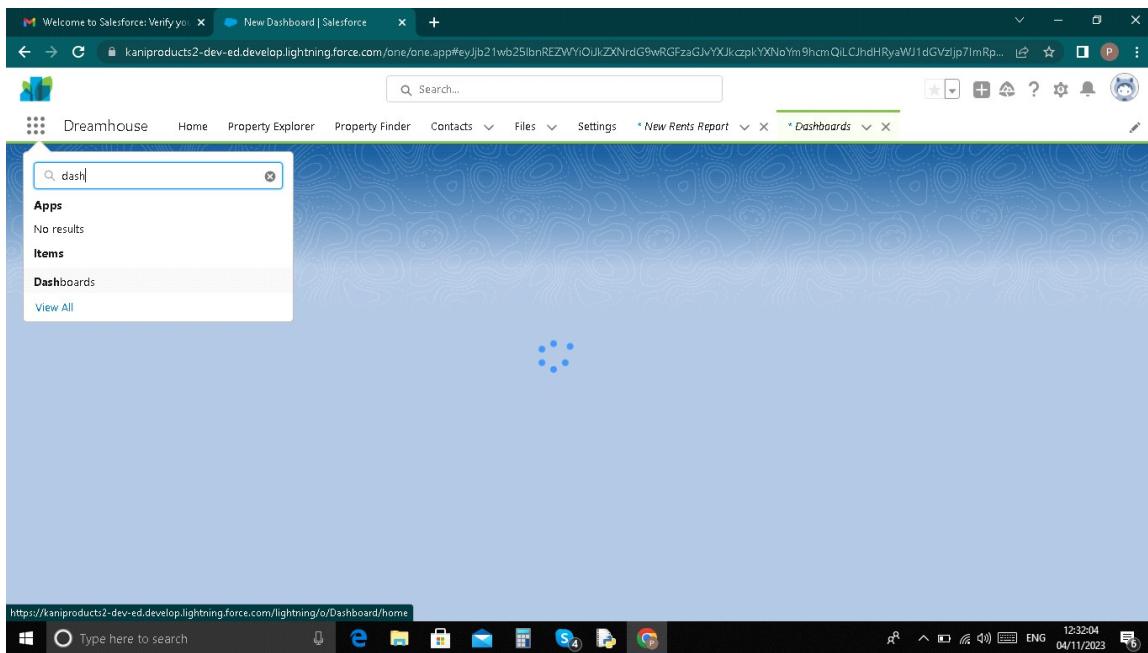
Select the report type-> click on start report.



Report->save or run it.

DASHBOARDS:

GO to the app launcher->select the dashboards->select add component.



Select the folder-> new lead with loan amount.

Lightning Usage App

new lead with loan amount

Last refreshed 5 days ago. Refresh this dashboard to see the latest data.

As of 06-Apr-2023, 10:17 am Viewing as Kanagavalli M

New Buyers Report

Buy: Buy Name: velli

New Loans Report

Loan: Loan Name: Type here to search

Select in which format you want display chat

Add Component

Report: New Lead with Loan Report

Use chart settings from report

Display As:

- Bar chart
- Line chart
- Scatter plot
- Map
- Donut chart
- Table
- Grid

Y-Axis: Interest rate

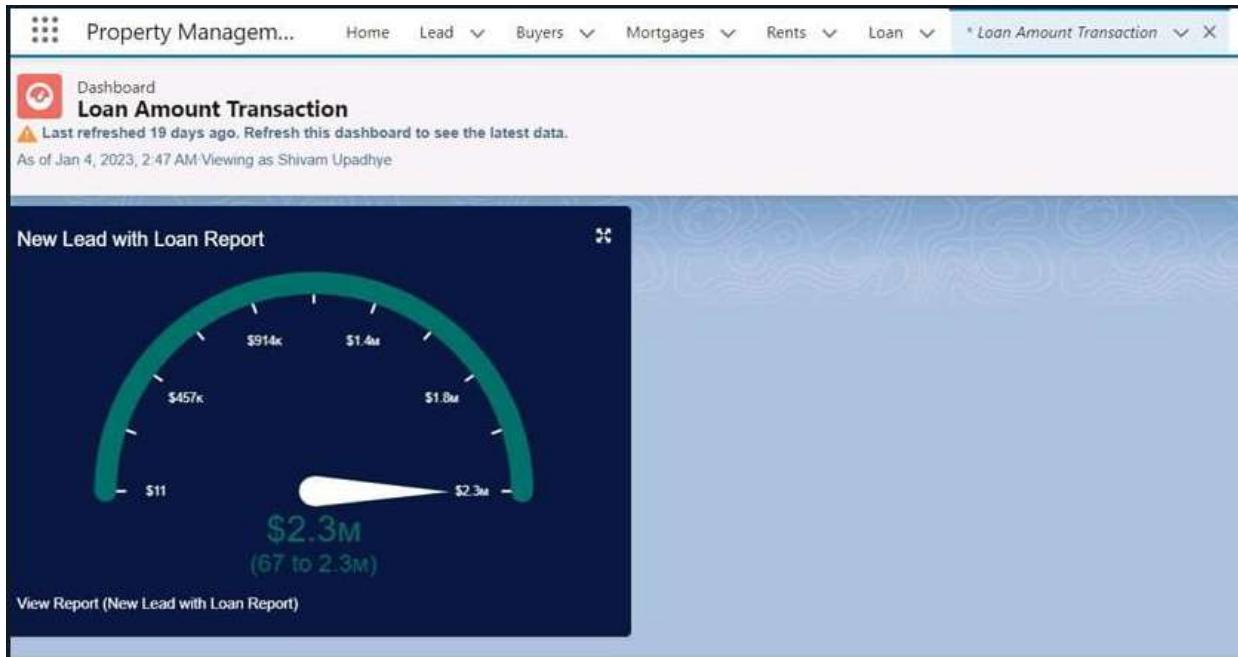
X-Axis: Sum of Loan Amount

Preview: New Lead with Loan Report

Interest rate	Sum of Loan Amount
10%	\$2.3M
12%	\$20k
15%	\$8.6k

View Report (New Lead with Loan Report)

Cancel Add



TRAILHEAD PROFILE PUBLIC URL:

- TEAM LEAD- <https://trailblazer.me/id/kanam54>
- TEAM MEMBER 1- <https://trailblazer.me/id/ranjali7>
- TEAM MEMBER 2- <https://trailblazer.me/id/s7vithun>
- TEAM MEMBER 3- <https://trailblazer.me/id/kanit30>

ADVANTAGES & DISADVANTAGES:

Advantages:

- You can access your information from anywhere
- Guest satisfaction may increase with a smooth check-in process

Disadvantages:

- You will be dependent on one vendor
- Cost can be prohibitive in the beginning

APPLICATION:

- ❖ Learn to integrate sales force with third party services
- ❖ Learn apex programming with hands on project
- ❖ Learn about custom setting and different type of custom

setting in sales force

CONCLUSION:

A Property management reporting is often time-consuming and costly .However, by adopting modern automation tools and dashboard, you can significantly reduce the effort it takes to create a report and eliminate any human error in the making of reports.

FUTURE SCOPE:

Sales force's ability to customize, build, and distribute apps has sparked innovation and accelerated cloud adoption in the advent of digital technology

- ✓ Now that you have the highest idea of what sales force hype is all about, let's uncover the career opportunities the ecosystem offers.

