

Project Report Template

1.INTRODUCTION

1.1 Overview

Develop an App for the Property Management where Buyer can order his Requirement and get the Appropriate Details of the Property. Also Track Whether he is Interested in taking the loan available for so just calculate how much loan Amount user can get it. Create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal.

1.2 Purpose

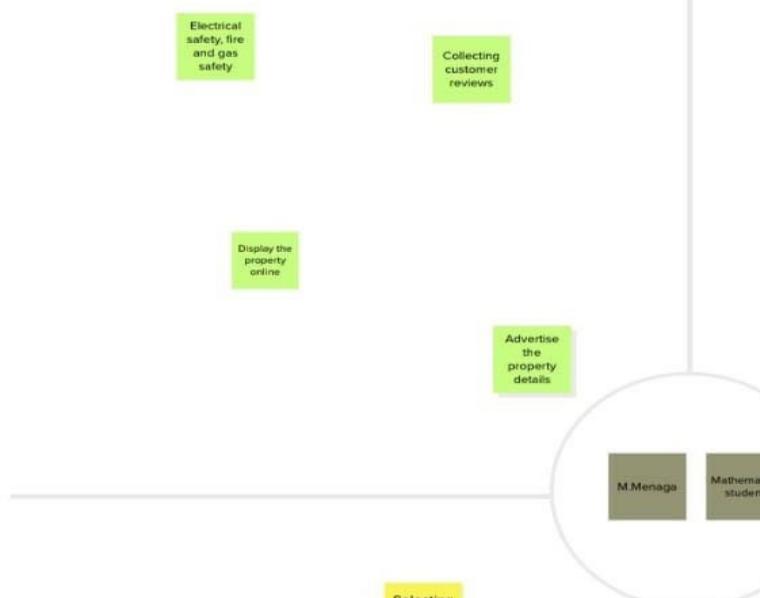
All data in one place and high level data Security. Increased staff efficiency. Automated routine tasks. Flexible pricing policy for any customer preferences. It is mainly focused on the purpose of Customer Relationship management.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map

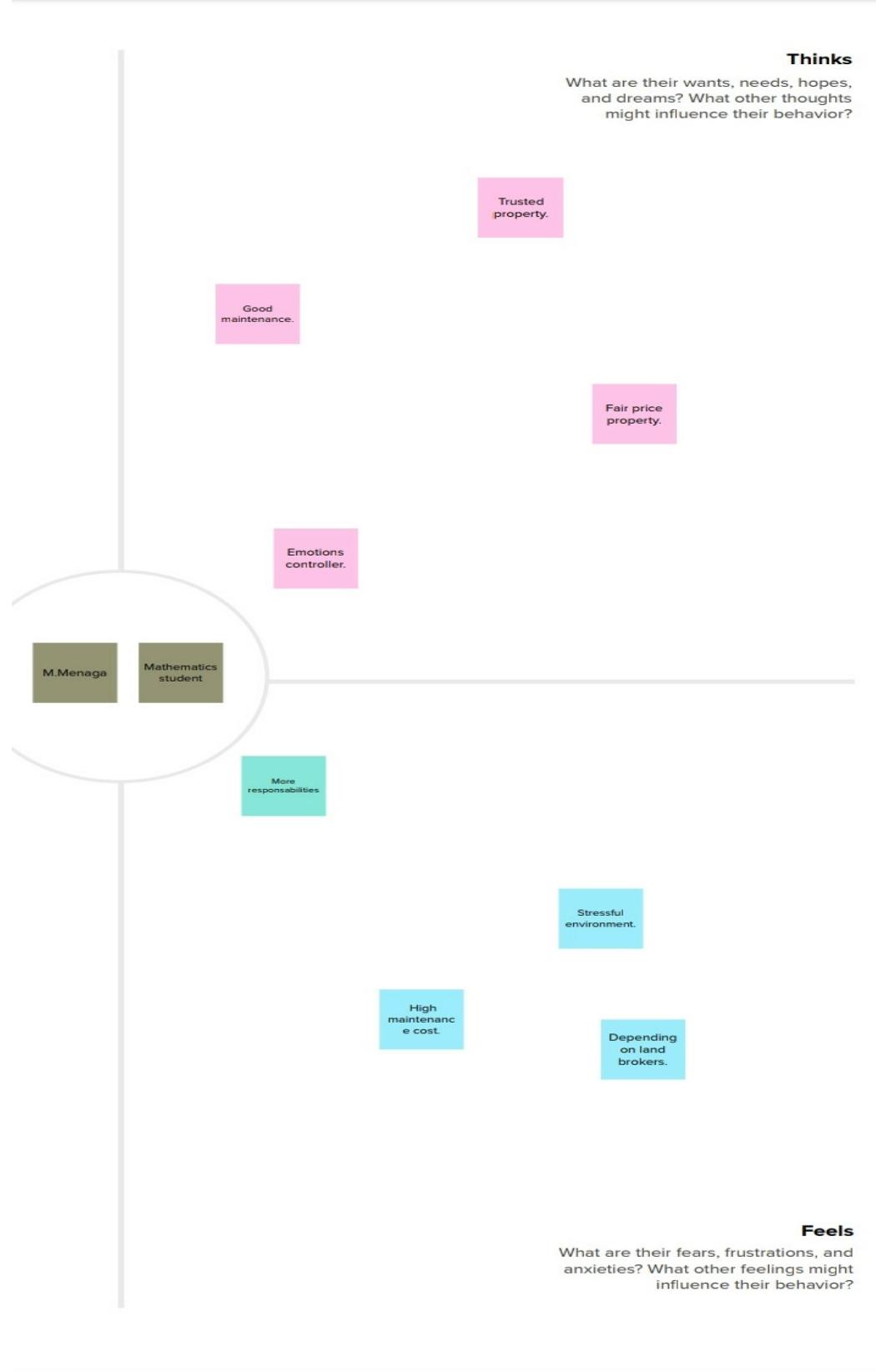
Says

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



Does

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



2.2 Ideation & Brainstorming Map

1

Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

⌚ 5 minutes

How might
we loan
available for
user?



Key rules of brainstorming

To run an smooth and productive session



Stay in topic.



Encourage wild ideas.



Defer judgment.



Listen to others.



Go for volume.



If possible, be visual.

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

M.Menaga

Establish a stable source of income.	Proper ID proof.	Bank statement of previous.

A.Abarna

Current dated salary slip.	Disclose additional sources of income , if any.	Avoid multiple lone applications.

Person 5

Person 6

TIP



You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

A.Saranya

A decent credit score.	A timely debt repayment history.	

P.Theivanayagi

Select the loan type that fits your salary.	A few assets such as investments, immovable property, etc..	

Person 7

Person 8

3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as sticky notes have been grouped, give each cluster a sentence-like label. bigger than six sticky notes, try and see if you and break it up into smaller ones.

⌚ 20 minutes

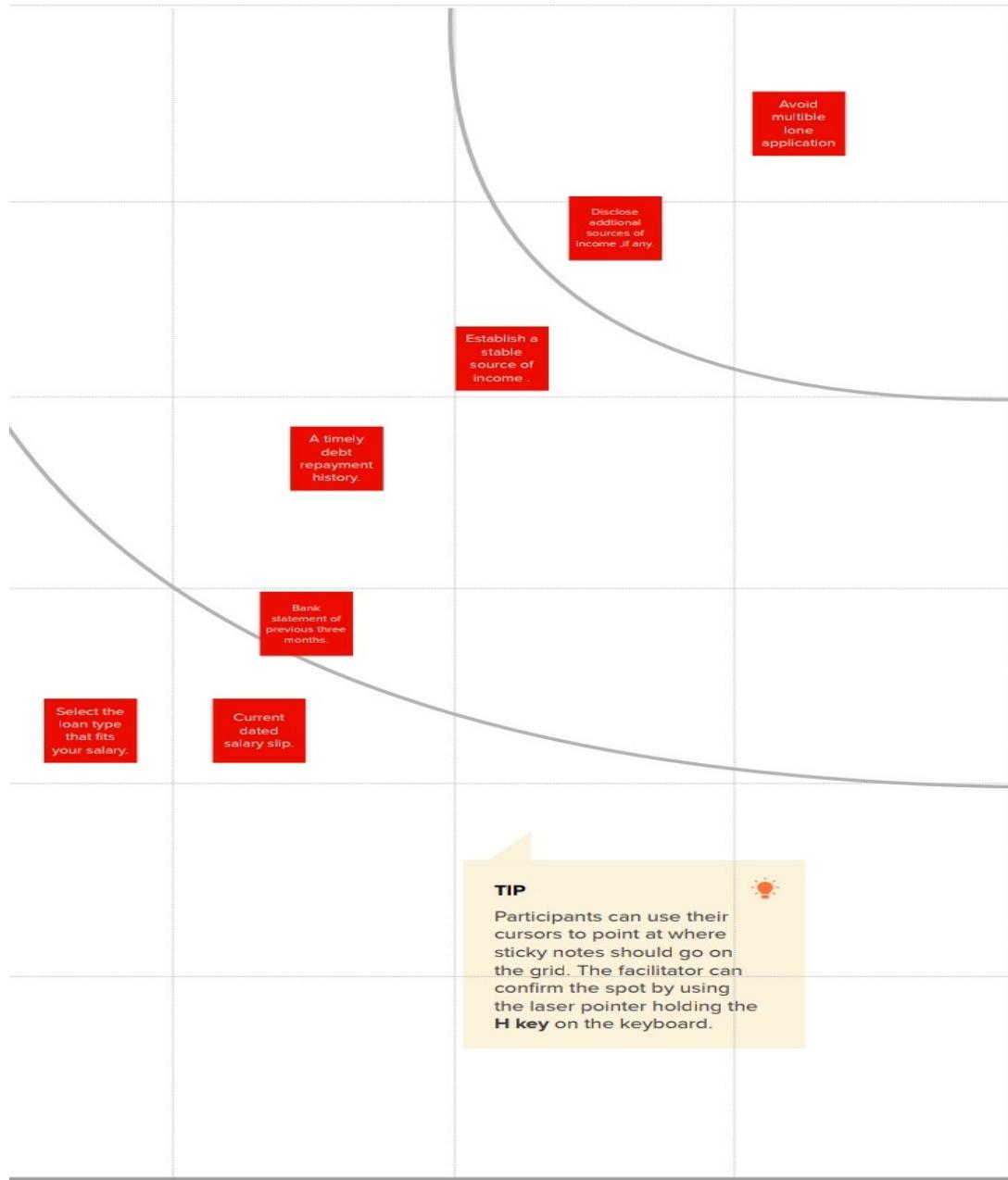




Feasibility

Regardless of their importance, which tasks are more

T
P
C
S
T
C
H



Feasibility

ess of their importance, which tasks are more than others? (Cost, time, effort, complexity, etc.)

3. RESULT

3.1 Date Model :

Objective Name	Fields in the Object	
Lead	Field Label	Data Type
	Lead	Auto number
	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
Buy	Field Lable	Data Type
	Buy	Text
	Property type	Picklist
	Discount	Percentage
	State	Text
	City	Text
	Annual Amount to be paid	Currency
Rent	Field Lable	Data Type
	Rent	Auto number
	Rental city	Text
	BHK Type	Picklist

	Field Label	Data Type
Loan	Loan id	Auto number
	Interest Rate	Currency
	Term	Number
	Annual loan	Number
	Total loan Instalments	Number
	Loan Repayment	Number
	Loan Amount	Formula

3.2 Activity & Screenshot

Milestone 1 : Creating Developer Account

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name* Last Name*

Email*

Role*

Company*

Country/Region*

Postal Code*

Username*

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations.

I agree to the Master Services Agreement – Developer Services and Salesforce Program Agreement.

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the Privacy Statement.

Sign me Up

Already have a Salesforce Developer Environment? [Log in](#)



Please check your username and password. If you still can't log in, contact your Salesforce administrator.

Username

1 Saved Username

kim@sam.soon

Password

.....|

Log In

It is used to Login to sales force Account. A sales force developer editions org is a special sales force edition that gives you a full featured sales force environment to develop and test existing or new features and test your own custom applications.

Milestone 2 : Object

The screenshot shows the 'Buy' object definition in the Salesforce Setup > Object Manager. The left sidebar lists various configuration tabs: 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, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

Custom Object Definition Edit (Top Bar): Save, Save & New, Cancel.

Custom Object Information (Section):

- Label:** Buy (Example: Account)
- Plural Label:** Buyers (Example: Accounts)
- Starts with word sound:**

Object Name (Section):

- Object Name:** Buy (Example: Account)

Description: (Text area)

Context-Sensitive Help Setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Enter Record Name Label and Format (Section):

- Record Name:** Buy Name (Example: Account Name)

Data Type: Text

Optional Features (Section):

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification (Section):

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status (Section):

- In Development
- Deployed

Search Status (Section):

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search

SETUP > OBJECT MANAGER

lead

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
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	lead	Example: Account
Plural Label	leads	Example: Accounts
Starts with word	<input type="checkbox"/>	word

The Object Name is used when referencing the object via the API.

Object Name	lead	Example: Account
-------------	------	------------------

Description

Contract-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	lead Name	Example: Account Name
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Data Type Text

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups

[Enable Licensing](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status What is this?

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Rent

Rent

Custom Object Definition Edit

Save | Save & New | Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Rent (Example: Account)
 Plural Label: Rents (Example: Accounts)
 Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Rent (Example: Account)

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window (selected)
 Content Name: -None-

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Rent Name (Example: Account Name)
 Data Type: Text

Optional Features

Allow Reports:
 Allow Activities:
 Track Field History:
 Allow in Chatter Groups:
 Enable Licensing:

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing:
 Allow Bulk API Access:
 Allow Streaming API Access:

Deployment Status

In Development:
 Deployed:

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search:

Save | Save & New | Cancel

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

- Custom Object Information:**
 - Label: Loan (Example: Account)
 - Plural Label: Loans (Example: Accounts)
 - Starts with vowel sound:
- The Object Name is used when referencing the object via the API.**
 - Object Name: Loan (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:** (None)
- Enter Record Name Label and Format:**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

 - Record Name: Loan Name (Example: Account Name)
 - Data Type: Text
- Optional Features:**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing
- Object Classification:**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

 - Allow Sharing
 - Allow Bulk API Access
 - Allow Streaming API Access
- Deployment Status:**
 - In Development
 - Deployed
- Search Status:**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

 - Allow Search

It is used to store data specific to an organization. Common business objects like Account, Contact, Lead and Opportunity are all standard objects. Custom objects are objects that you create to store information that is specific to your company or industry.

Milestone 3 : Tab

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, a search bar labeled "Search Setup", and various setup icons. The main menu bar has "Setup" selected, along with "Home" and "Object Manager". A sidebar on the left is titled "User Interface" and contains links for "Loaded Console Tab Limit", "Rename Tabs and Labels", and "Tabs", which is currently selected. A global search bar at the bottom of the sidebar contains the text "Tab". The main content area is titled "Edit Custom Object Tab" and shows "Rents" as the object being customized. It includes fields for "Tab Label" (set to "Rents"), "Object" (set to "Rent"), and "Tab Style" (set to "Car"). An optional field for "Splash Page Custom Link" is set to "-None-". There is also a "Description" field with a large empty text area. At the bottom right of the content area are "Save" and "Cancel" buttons.

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Events	Building	
Edit Del	Leads	People	
Edit Del	Leads	Bank	
Edit Del	Santa	Car	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

It is used to build records of for objects and to view the records in the objects.

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

Milestone 4: The Lightning App

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

Property management

* Developer Name ⓘ

Property_management

Description ⓘ

Enter a description...

App Branding

Image ⓘ

Upload

Primary Color Hex

Value ⓘ

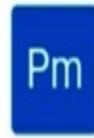


#0070D2

Org Theme Options

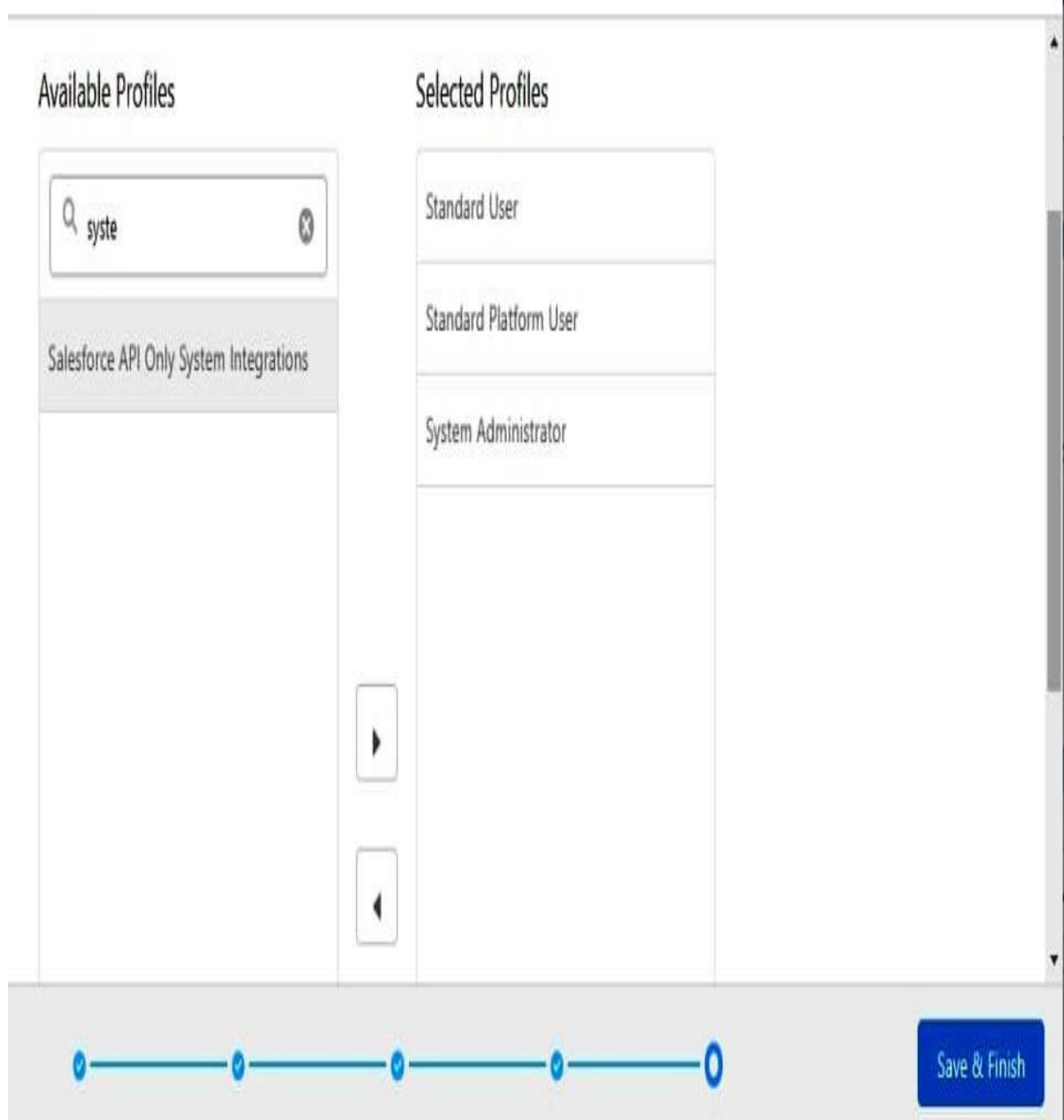
Use the app's image and color
instead of the org's custom theme

App Launcher Preview



Property management

New Lightning App



An app is a Collection of items that work together to serve a particular function. Lightning app is a component based framework for sales force app development. Sales force lightning aims to simplify the sales force app development processes for business users, who typically do not have programming experience.

Milestone 5 : Fields

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

Custom Field Definition Edit (Lead)

Field Information (Required Information)

- Field Label:** lead
- Field Name:** lead
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** User
- Field Usage:** -None-
- Data Sensitivity Level:** -None-
- Compliance Categorization:** 0 selected

General Options

- External ID:** Set this field as the unique record identifier from an external system

Auto Number Options

- Auto Number Display Format:** L-(0000)

Buttons: Change Field Type, Save, Cancel

Edit Lead Custom Field

Help for this Page **State**

Custom Field Definition Edit

[Change Field Type](#)[Promote to Global Value Set](#)[Save](#)[Cancel](#)

Field Information

 = Required Information

Field Label

State

Data Type: Picklist

Field Name

State

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

0 selected



0 selected



General Options

Required

 Always require a value in this field in order to save a record

Default Value

[Show Formula Editor](#)

Use [formula syntax](#). Enclose text and picklist value API names in double quotes : ('the_text'), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use:
\$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Picklist Options

 Restrict picklist to the values defined in the value set [Change Field Type](#)[Promote to Global Value Set](#)[Save](#)[Cancel](#)

Search Setup

Custom Field Manager

Edit Custom Field City

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

Field Information ! = Required Information

Field Label	<input type="text" value="City"/>	Data Type	Text
Field Name	<input type="text" value="City"/>		
Description	<input type="text"/>		
Help Text	<input type="text"/>		
Data Owner	User	<input type="button" value=""/>	
Field Usage	--None--	<input type="button" value=""/>	
Data Sensitivity Level	--None--	<input type="button" value=""/>	
Compliance Categorization	0 selected	<input type="button" value=""/>	0 selected

General Options

Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> <input checked="" type="radio"/> Do not allow duplicate values <ul style="list-style-type: none"> <input checked="" type="radio"/> Treat "ABC" and "abc" as duplicate values (case insensitive) <input type="radio"/> Treat "ABC" and "abc" as different values (case sensitive)
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
Default Value	Show Formula Editor
<p>Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c</p>	

Text Options

Length	<input type="text" value="20"/>
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[Change Field Type](#) [Save](#) [Cancel](#)



Search Setup

Object Manager

Edit Buy Custom Field
Annual amount to be paid

Custom Field Definition Edit Change Field Type Save Cancel

Field Information Required Information

Field Label	Annual amount to be paid	Data Type	Currency	
Field Name	Annual_amount_to_be_paid			
Description				
Help Text				
Data Owner	User	[]		
Field Usage	--None--	[]		
Date Sensitivity Level	--None--	[]		
Compliance Categorization	0 selected	[]	0 selected	[]

General Options

Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Default Value	Show Formula Editor Use formula syntax; Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: <code>\$CustomMetadata.Type__mdt.RecordAPIName.Field__c</code>

Currency Options

Length	18
Decimal Places	0

Change Field Type Save Cancel

The screenshot shows the Salesforce interface for editing a custom field. The top navigation bar includes a cloud icon, search bar, and various setup tools. The main title is "Edit Rent Custom Field" under the "Rent" object. The "Custom Field Definition Edit" section has buttons for "Change Field Type", "Save", and "Cancel".

Field Information

Field Label	Rent	Data Type	Auto Number
Field Name	Rent		
Description			
Help Text			

General Options

External ID Set this field as the unique record identifier from an external system

Auto Number Options

Auto Number Display Format: R-{0000}

Buttons at the bottom: Change Field Type, Save, Cancel



Search Setup

anager

Edit Rent Custom Field
BHK type

Help for this Page

Custom Field Definition Edit Change Field Type Promote to Global Value Set Save Cancel

Field Information * = Required Information

Field Label:	BHK type	Data Type:	Picklist	
Field Name:	BHK_type			
Description:				
Help Text:				
Data Owner:	User	[i] [x]		
Field Usage:	—None—	[i] [x]		
Data Sensitivity Level:	—None—	[i] [x]		
Compliance Categorization:	0 selected	[>]	0 selected	[<]

General Options

Required:	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Default Value:	Show Formula Editor
<small>Use formula syntax. Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c</small>	

Picklist Options

<input checked="" type="checkbox"/> Restrict picklist to the values defined in the value set	[i]
--	-----

Change Field Type Promote to Global Value Set Save Cancel

The screenshot shows the Salesforce Custom Field Definition Edit screen. The top navigation bar includes a blue cloud icon, a search bar labeled "Search Setup", and various standard icons. Below the header, a sidebar shows "Manager" and a dropdown menu. The main content area has a title "Total loan instalments" with a help link. The page is titled "Custom Field Definition Edit" with buttons for "Change Field Type", "Save", and "Cancel".

Field Information

Field Label	Total loan instalments	Data Type	Number
Field Name	Total_Join_Instalments	+ Required Info	
Description			
Help Text			
Data Owner	User	<input type="text"/>	
Field Usage	--None--		
Data Sensitivity Level	--None--		
Compliance Categorization	0 selected	<input type="button" value=">"/>	0 selected

General Options

Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record.
Unique	<input checked="" type="checkbox"/> Do not allow duplicate values
External ID	<input checked="" type="checkbox"/> Set this field as the unique record identifier from an external system
AI Prediction	<input checked="" type="checkbox"/> Use this field to store AI prediction scores.
Default Value	Show Formula Editor Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"), include numbers without quotes : (25), show percentages as decimals (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Number Options

Length	18
Decimal Places	0

Buttons at the bottom: Change Field Type, Save, Cancel.



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1



Cloud Search Setup Help for this Page ?

SETUP > OBJECT MANAGER

Buy

Custom Field Definition Edit Change Field Type Promote to Global Value Set Save Cancel

Field Information

Field Label: **Property type** Data Type: Picklist
Field Name: **Property_type**

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization: 0 selected / 0 selected

General Options

Required: Always require a value in this field in order to save a record
Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Picklist Options

Restrict picklist to the values defined in the value set

Change Field Type Promote to Global Value Set Save Cancel

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
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules





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1



SETUP > OBJECT MANAGER

Buy

Annual amount to be paid

Custom Field Definition Edit Change Field Type Save Cancel

Field Information

Field Label	Annual amount to be paid	Data Type	Currency
Field Name	Annual_amount_to_be_paid		
Description			
Help Text			
Data Owner	User		
Field Usage	None		
Data Sensitivity Level	None		
Compliance Categorization	0 selected	0 selected	

General Options

Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Default Value	Show Formula Editor
Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c	

Currency Options

Length	18
Decimal Places	0

Change Field Type Save Cancel





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
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Loan Repayment

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label: **Loan Repayment** Data Type: Number
Field Name: **Loan_Repayment**

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization: 0 selected

General Options

Required: Always require a value in this field in order to save a record
Unique: Do not allow duplicate values
External ID: Set this field as the unique record identifier from an external system
AI Prediction: Use this field to store AI prediction scores
Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7), To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Number Options

Length: 18
Decimal Places: 0

Change Field Type Save Cancel



Search Setup

Home Object Manager

IP > OBJECT MANAGER

Edit Loan Custom Field Annual loan

Help for this Page

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

Field Information Required Information

Field Label	Annual loan	Data Type	Number
Field Name	Annual_loan		
Description			
Help Text			
Data Owner	User		
Field Usage	—None—		
Data Sensitivity Level	—None—		
Compliance Categorization	0 selected	0 selected	

General Options

Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
AI Prediction	<input type="checkbox"/> Use this field to store AI prediction scores
Default Value	Show Formula Editor
<p>Use formula syntax: Enclose text and picklist value API names in double quotes : (<code>'the_text'</code>), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: <code>\$CustomMetadata.Type__mdt.RecordAPIName.Field__c</code></p>	

Number Options

Length	18
Decimal Places	0

[Change Field Type](#) [Save](#) [Cancel](#)



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
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

Field Information Required Info

Field Label: **Total loan instalments** Data Type: Number

Field Name: **Total_loan_instalments**

Description:

Help Text:

Data Owner: User

Field Usage: -None-

Data Sensitivity Level: -None-

Compliance Categorization: 0 selected

General Options

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

External ID: Set this field as the unique record identifier from an external system

AI Prediction: Use this field to store AI prediction scores

Default Value: [Show Formula Editor](#)

Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"), include numbers without quotes : (25), show percentages as decimals (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Number Options

Length: **18**

Decimal Places: **0**

[Change Field Type](#) [Save](#) [Cancel](#)





SETUP > OBJECT MANAGER

Buy

Custom Field Definition Edit

Field Information

Field Label: Buy Data Type: Text

Field Name: Buy

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization: 0 selected

General Options

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values
 Treat 'ABC' and 'abc' as duplicate values (case insensitive)
 Treat 'ABC' and 'abc' as different values (case sensitive)

External ID: Set this field as the unique record identifier from an external system

Default Value: Show Formula Editor

Text Options

Length: 30

Change Field Type Save Cancel





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It lead Custom Field
mail

Help for

Custom Field Definition Edit

Change Field Type

Save

Cancel

■ = Required

Field Information

Field Label

Data Type Email

Field Name

Description

Help Text



Data Owner

User

Field Usage

-None-

Data Sensitivity Level

-None-

Compliance Categorization

0 selected



0 selected

General Options

Required

 Always require a value in this field in order to save a record

Unique

 Do not allow duplicate values

External ID

 Set this field as the unique record identifier from an external system

Default Value

[Show Formula Editor](#)

Use [formula syntax](#): Enclose text and picklist value API names in double quote ("the_text"), include numbers without quotes : (25), show percentages as decimal (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use:
\$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Change Field Type

Save

Cancel



Search Setup

Manager

Loan Custom Field Interest rate

Help for this Page ?

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

Field Information ! = Required Information

Field Label	<input type="text" value="Interest rate"/>	Data Type	Currency	
Field Name	<input type="text" value="Interest_rate"/>			
Description	<input type="text"/>			
Help Text	<input type="text"/>			
Data Owner	User	<input type="button" value=""/>		
Field Usage	--None--	<input type="button" value=""/>		
Data Sensitivity Level	--None--	<input type="button" value=""/>		
Compliance Categorization	0 selected	<input type="button" value=""/>	0 selected	<input type="button" value=""/>

General Options

Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Default Value	Show Formula Editor
<p>Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c</p>	

Currency Options

Length	<input type="text" value="18"/>
Decimal Places	<input type="text" value="0"/>

[Change Field Type](#) [Save](#) [Cancel](#)



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SETUP > OBJECT MANAGER

Rent

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
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

**Edit Rent Custom Field
Rental City**

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

Field Information * = Required Information

Field Label	Rental City	Data Type	Text
Field Name	Rental_City		
Description			
Help Text			

Data Owner: User [User](#)

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization: 0 selected [0 selected](#)

General Options

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

- Treat 'ABC' and 'abc' as duplicate values (case insensitive)
- Treat 'ABC' and 'abc' as different values (case sensitive)

External ID: Set this field as the unique record identifier from an external system

Default Value: [Show Formula Editor](#)

Use [formula syntax](#). Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals : (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadatatype record use:
`$CustomMetadata.Type__mdt.RecordAPIName.Field__c`

Text Options

Length: 20

[Change Field Type](#) [Save](#) [Cancel](#)



The screenshot shows the 'Edit Custom Field' interface in Salesforce. The field being edited is named 'Loan Amount'. The 'Field Label' is set to 'Loan Amount'. The 'Field Name' is 'Loan_Amount'. The 'Data Owner' is set to 'User'. The 'Field Usage' is 'None'. The 'Formula Options' section shows a complex formula for calculating 'Loan Amount' based on 'Loan_Repayment__c', 'Interest_rate__c', and 'Term__c'. The formula is:

```

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

```

The 'Blank Field Handling' section indicates that blank fields should be treated as zeroes. There are three buttons at the bottom: 'Save', 'Quick Save', and 'Cancel'.

It is represent the data stored in the column or a relational database. Fields store data values that are required for a particular object in a record. Hence, the final decision depends on the user, and he can add or remove Custom Fields.

Milestone 6: Profile

The screenshot shows the Salesforce Setup Home interface. On the left, there's a sidebar with various setup options like Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. Under the Users section, Profiles is selected, highlighted with a blue background.

The main content area is titled "SETUP Profiles". It shows a "Marketing Manager" profile being edited. The profile details are as follows:

- Name: Marketing Manager
- User License: Salesforce Platform
- Description: (empty)
- Custom Profile: checked

Below this, there are two sections: "Custom App Settings" and "Service Provider Access".

Custom App Settings

	Visible	Default
Analytics Studio (standard_insight)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>
Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Property Management (Property_Management)	<input checked="" type="checkbox"/>	<input type="radio"/>
WDC (standard_WDC)	<input type="checkbox"/>	<input checked="" type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On
Accounts	<input type="button" value="Default On"/>
Alert Settings	<input type="button" value="Default On"/>
All Sites	<input type="button" value="Tab Hidden"/>
Alternative Payment Methods	<input type="button" value="Tab Hidden"/>
Analytics	<input type="button" value="Tab Hidden"/>
App Launcher	<input type="button" value="Default On"/>
Appointment Initiations	<input type="button" value="Default Off"/>
Approval Requests	<input type="button" value="Default On"/>
Assets	<input type="button" value="Tab Hidden"/>
Authorization Form	<input type="button" value="Default On"/>
Authorization Form Consent	<input type="button" value="Default On"/>
Authorization Form Data Use	<input type="button" value="Default On"/>
Authorization Form Test	<input type="button" value="Default On"/>
Awards	<input type="button" value="Tab Hidden"/>
Background Operations	<input type="button" value="Tab Hidden"/>
Business Trends	<input type="button" value="Tab Hidden"/>
Calendar	<input type="button" value="Default On"/>
Card Payment Methods	<input type="button" value="Tab Hidden"/>
Chatter	<input type="button" value="Default On"/>
Chatter	<input type="button" value="Default On"/>
CMS Channels	<input type="button" value="Tab Hidden"/>
CMS Workspaces	<input type="button" value="Tab Hidden"/>
Communication Subscription Channel Types	<input type="button" value="Tab Hidden"/>
Invoices	<input type="button" value="Tab Hidden"/>
Learning	<input type="button" value="Default On"/>
Libraries	<input type="button" value="Tab Hidden"/>
Lightning Bolt Solutions	<input type="button" value="Default On"/>
Lightning Usage	<input type="button" value="Default On"/>
List Emails	<input type="button" value="Tab Hidden"/>
Location Groups	<input type="button" value="Tab Hidden"/>
Locations	<input type="button" value="Tab Hidden"/>
Mobile Home	<input type="button" value="Tab Hidden"/>
Unpackaged Inventory	<input type="button" value="Tab Hidden"/>
Operating Hours	<input type="button" value="Tab Hidden"/>
Orchestration Runs	<input type="button" value="Default On"/>
Orchestration Work Items	<input type="button" value="Default On"/>
Orders	<input type="button" value="Tab Hidden"/>
Org Metrics	<input type="button" value="Default On"/>
Party Consent	<input type="button" value="Tab Hidden"/>
Paused Flows	<input type="button" value="Default On"/>
Payment Authorization Adjustments	<input type="button" value="Tab Hidden"/>
Payment Authorizations	<input type="button" value="Tab Hidden"/>
Payment Gateway Logs	<input type="button" value="Tab Hidden"/>
Payment Gateways	<input type="button" value="Tab Hidden"/>
Payment Line Invoices	<input type="button" value="Tab Hidden"/>
Payments	<input type="button" value="Tab Hidden"/>
People	<input type="button" value="Default On"/>

The screenshot shows the Salesforce Setup Home interface. On the left, a sidebar lists various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, and Salesforce Mobile App. Under ADMINISTRATION, the Profiles section is selected, indicated by a blue background.

The main content area displays the 'Profiles' setup page for the 'Sales Manager' profile. The 'Profile Edit' section shows the profile name as 'Sales Manager', user license as 'Salesforce', and a checked 'Custom Profile' checkbox. Below this is the 'Custom App Settings' section, which lists various app settings with checkboxes for 'Visible Default'. The 'Service Provider Access' section is also visible. At the bottom, there are tabs for 'Tab Settings' and 'Standard Tab Settings', with the latter being the active tab.

A Profile is a Collection of Settings and permission that define what a user can do in sales force. Profiles decide which objects and data they have access to. They may be thought of simply as profiles that control what the user can do with the items. With the four actions of Create, Read, Edit, and Delete you may choose the Sales force profile controls.

Milestone 7 : New User

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User Edit Alan Janson

General Information

First Name: Alan	Role: <None Specified>
Last Name: Janson	User License: Salesforce
Alias: ajans	Profile: Sales Rep3
Email: mmnenga117@gmail.com	Active: <input checked="" type="checkbox"/>
Username: mmnenga117@gmail.com	Marketing User: <input type="checkbox"/>
Nickname: User16807735530402848292	Offline User: <input type="checkbox"/>
Title: <input type="text"/>	Knowledge User: <input type="checkbox"/>
Company: <input type="text"/>	Flow User: <input type="checkbox"/>
Department: <input type="text"/>	Service Cloud User: <input type="checkbox"/>
Division: <input type="text"/>	Site.com Contactor User: <input type="checkbox"/>
	Site.com Publisher User: <input type="checkbox"/>
	WDC User: <input type="checkbox"/>
	Data.com User Type: <input type="text"/> -None-
	Data.com Monthly Addition Limit: <input type="text"/> 300
Accessibility	
Mode (Classic Only)	
High Contrast: <input type="checkbox"/>	Palette on Charts: <input type="checkbox"/>
Load Lightning Pages While Scrolling: <input checked="" type="checkbox"/>	Debug Mode: <input type="checkbox"/>
Make Setup My Default Landing Page: <input type="checkbox"/>	
Salesforce	
CRM Content User: <input checked="" type="checkbox"/>	
Receive Salesforce CRM Content Emails: <input checked="" type="checkbox"/>	
Receive Salesforce CRM Content Alerts as Daily Digest: <input checked="" type="checkbox"/>	
Allow Forecasting: <input type="checkbox"/>	
Call Center: <input type="text"/>	
Phone: <input type="text"/>	
Extension: <input type="text"/>	
Fax: <input type="text"/>	
Mobile: <input type="text"/>	
Email Encoding: Unicode (UTF-8)	
Employee Number: <input type="text"/>	

SETUP
Users

User Edit
Leaung Chan Help for

User Edit Save Save & New Cancel

General Information = Required

First Name	Leaung	Role	<None Specified>
Last Name	Chan	User License	Salesforce Platform
Alias	Ichan	Profile	Marketing Executive1
Email	aparnaapar12@gmail.com	Active	<input checked="" type="checkbox"/>
Username	aparnaapar12@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User16808620364141582978	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>
		Make Setup My Default Landing Page	<input type="checkbox"/>
		Salesforce CRM Content User	<input checked="" type="checkbox"/>
		Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
		Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		Call Center	
		Phone	
		Extension	
		Fax	
		Mobile	
		Email Encoding	Unicode (UTF-8)
		Employee Number	

A user is anyone who logs in to sales force. 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 sales force has a user account. In sales force, each user is uniquely identified with a username, password and profile.

Milestone 8 : Permission Set

SETUP

Permission Sets

On Set
e: Sales Rep3

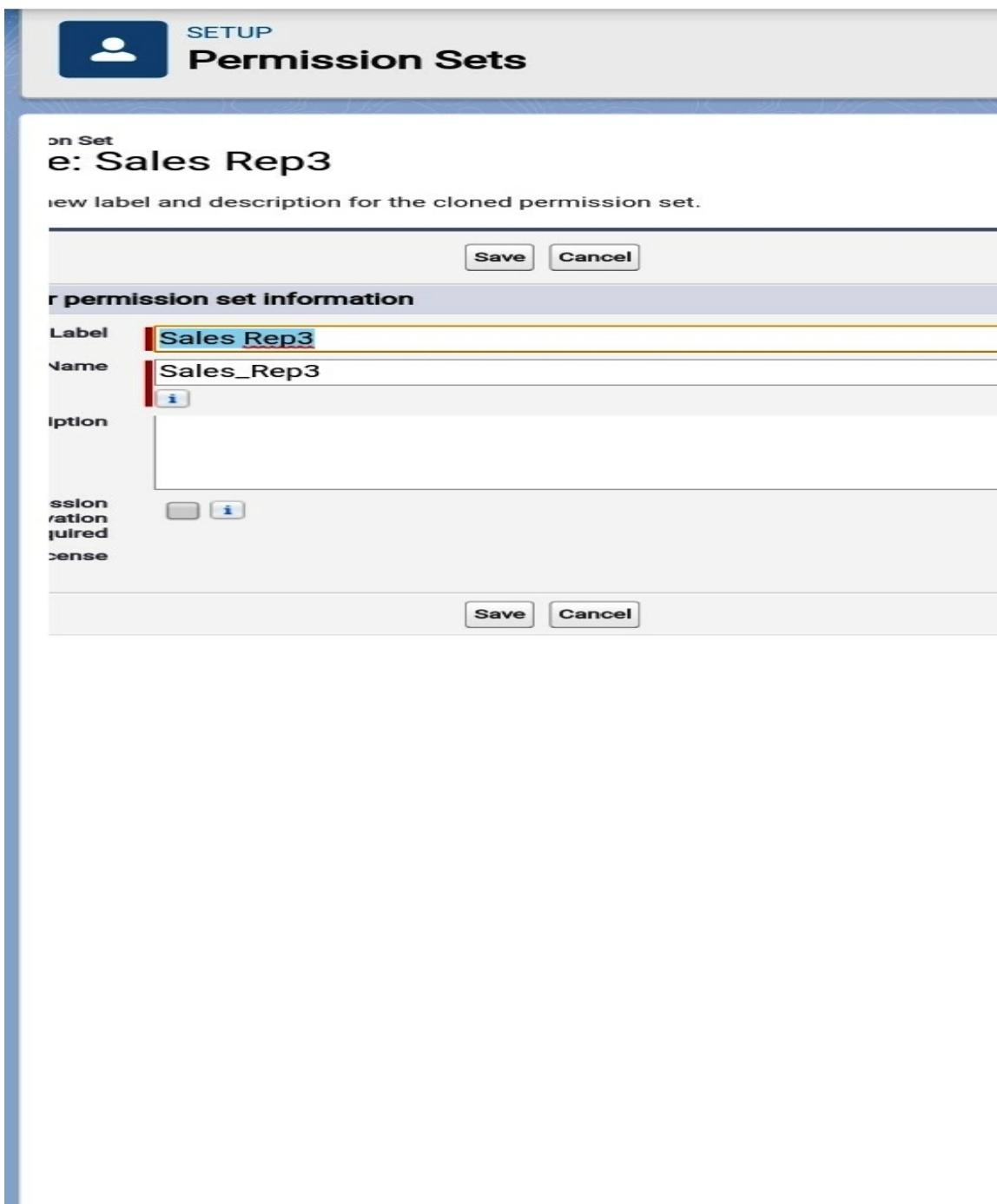
New label and description for the cloned permission set.

Save **Cancel**

permission set information

Label	Sales Rep3
Name	Sales_Rep3
Description	
Session ration required	
Access	

Save **Cancel**



The screenshot shows a user interface for managing assignment expiration. At the top, there's a header bar with a profile icon and the text "...> PERMISSION SET 'SALES MANAGER' > MANAGE ASSIGNMENT EXPIRATION". Below this, the title "Sales manager" is displayed. The main area is titled "Select Users to Assign" and features a "Recently Viewed" section. This section includes a search bar labeled "Search this list..." and filter buttons for "Title", "Phone", and "Email". A list of three users is shown:

Full Name	Email
Leaung Chan	aparnaapar12@gmail.com
Alan Janson	mimenaga117@gmail.com
M. Menaga Muruganantham	mimenaga117@gmail.com

At the bottom of the list, there are "Cancel" and "Next" buttons.

A permission set is a collection of settings and permissions that give users access to various tools and functions. The settings and permissions in permission sets are also found in profiles, but permission sets extend users' functional access without changing their profiles.

Milestone 9 : Setup for OWD

SETUP

Sharing Settings

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: [All Objects](#)

[Disable External Sharing Model](#)

Default Sharing Settings

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contact	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	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Alternative Payment Method	Private	Private	✓
Appointment Invitation	Private	Private	✓
Authorization Form	Private	Private	✓
Authorization Form Consent	Private	Private	✓
Authorization Form Data Use	Private	Private	✓
Business Brand	Private	Private	✓
Change Request	Private	Private	✓
Communication Subscription	Private	Private	✓
Communication Subscription Channel Type	Private	Private	✓
Communication Subscription Consent	Private	Private	✓
Consumption Schedule	Public Read Only	Private	✓
Contact Point Address	Controlled by Parent	Controlled by Parent	✓
Contact Point Consent	Private	Private	✓
Contact Point Email	Controlled by Parent	Controlled by Parent	✓
Contact Point Phone	Controlled by Parent	Controlled by Parent	✓
Contact Point Type Consent	Private	Private	✓
Contact Request	Public Read/Write	Private	✓
Coupon	Private	Private	✓
Credit Memo	Public Read/Write	Private	✓
Customer	Private	Private	✓
Data Use Legal Basis	Private	Private	✓

Organization-wide Defaults, or OWD, are the pattern security rules that you can follow for your sales force instance. Organization-Wide sharing settings determine the baseline level of access for all records of an object. Organization-Wide defaults can never grant users more access than they have through their object permissions.

Milestone 10 : Report

REPORT ▾

Loan Amount / Loans

Fields > Outline Filters 2

Groups GROUP ROWS

Loan Id x

Loan Amount x

GROUP COLUMNS

Loan Repayment x

Term x

Columns Add column...

Loan: ID x

Loan: Loan Name x

Annual loan x

Interest rate x

Total loan instalments x

Loan: Owner Name x

Loan: Owner Alias x

Loan: Owner Role x

Loan: Created By x

Loan: Created Alias x

Loan: Created Date x

Loan: Last Modified By x

Loan: Last Modified Alias x

Loan: Last Modified Date x

Details (0 Rows) Click an intersection in the table above to filter details.

	Loan: ID	Loan: Loan Name	Annual loan	Interest rate	Total loan instalments	Loan: Owner N
--	----------	-----------------	-------------	---------------	------------------------	---------------

The screenshot shows the Salesforce Report Builder interface. At the top, there's a navigation bar with links for leads, Buyers, Rents, Loans, and Report Builder. Below the navigation is a search bar and a toolbar with icons for Add Chart, Save & Run, Save, Close, and Run.

The main area is titled "REPORT" and "New Accounts Report". It shows a table with columns: Account Name, Rating, and Billing City. A message indicates "No records returned. Try editing report filters:" followed by three suggestions: "Show All accounts.", "Set the Created Date filter to All Time.", and "Edit other filters in the filter panel." Below the table, there's a section for "Details (0 Rows)" with columns: Last Activity, Account Owner, Billing State/Province, and Last Modified Date. On the left, there's a sidebar with sections for Groups (Account Name, Rating), Group Columns (Type, Billing City), and Columns (Last Activity, Account Owner, Billing State/Province). At the bottom, there's a taskbar with various application icons and a system status bar showing "Activate Windows Go to Settings to activate Windows.", "Conditional Formatting", "Row Counts", "Detail Rows", "Subtotals", "Grand Total", and "Stacked Summaries".

A report is a list of records that meet the criteria you define. It's displayed in sales force in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder.

Milestone 11 : Dashboards

Edit Component

Report

New Accounts Report X

Use chart settings from report i

Display As

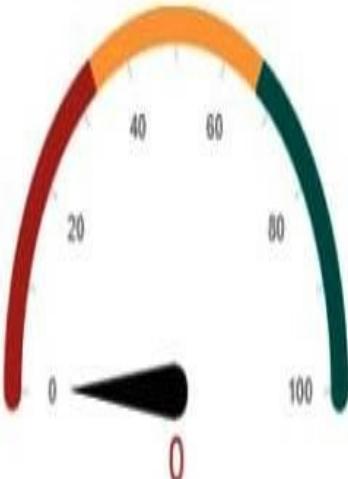
    

Mode

Preview

New Accounts Report



A gauge chart with a scale from 0 to 100. The needle is at 0. The chart has three segments: red (0-40), yellow (40-60), and green (60-100). The numbers 0, 20, 40, 60, 80, and 100 are labeled around the perimeter.

View Report (New Accounts Report)

Cancel Update Add

Edit Component

Report

Loan Amount X

Use chart settings from report i

Display As

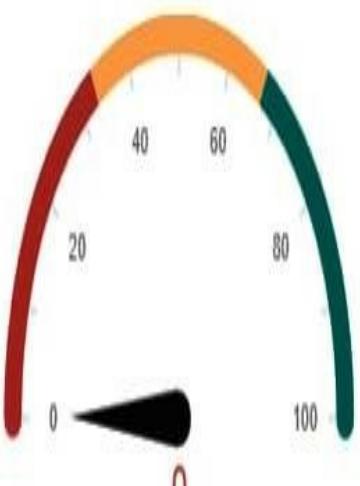






Preview

Loan Amount



View Report (Loan Amount)

Mode

Cancel Update

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Dashboards let you curate data from reports using charts, tables and metrics. If your colleagues need more information, then they are able to view your dashboard's data supplying reports. Dashboards filters make it easy for users.

4.TRAIL HEAD PROFILE PUBLIC URL

Team lead	-	https://trailblazer.me/id/mmuruganantham2
Team Member 1	-	https://trailblazer.me/id/aasaithambi3
Team Member 2	-	https://trailblazer.me/id/ppalanisamy28

5. ADVANTAGES & DISADVANTAGE

ADVANTAGES

- ❖ Easily maintenance monitoring.
- ❖ Better reporting and data tracking.
- ❖ Creator sense of affiliation Release of collective energies.

DISADVANTAGE

- ❖ You will be dependent one vendor.
- ❖ Breaking of autonomy and initiative.
- ❖ The contributor who lacks autonomy is over helmed.

6. APPLICATIONS

Document storage, Tenant, on boarding, online repayments, Rental listings.

7. CONCLUSION

On overall the project has achieved its objectives. Sales force has been growing tremendously its employees, customers, offices throughout the world by providing innovative and best ideas and solutions to solve present generation business problems. Sales force technologies is one of the leading and very hot technology in IT industry. This application provides appropriate information to users.

8. FUTURE SCOPE

Sales force development role needs someone who is good at sales force admin and also can do coding and object oriented programming.