

NAAN MUDHALAVAN

SALES FORCE PROJECT REPORT

COLLEGE:- SCAD COLLEGE OF ENGINEERING & TECHNOLOGY

BATCH 12

NAME	NM ID	REG NO
NAGARAJ M	270289154AE05D293CD4E8B95FE87B42	952820114015
MOHAMED JUBAIR UL AZEEZ A	D29074D615693959F39482C1F6CF4F90	952820114334
PRABAKARAN ANAND M	4320BA89E21FA0AAEFE442763C8A4DD1	952820114653
RAJA S	EEAF8EC233C2622B3824C35B788EC48C	952820114972

STEP 1: CREATE A SALESFORCE ACCOUNT

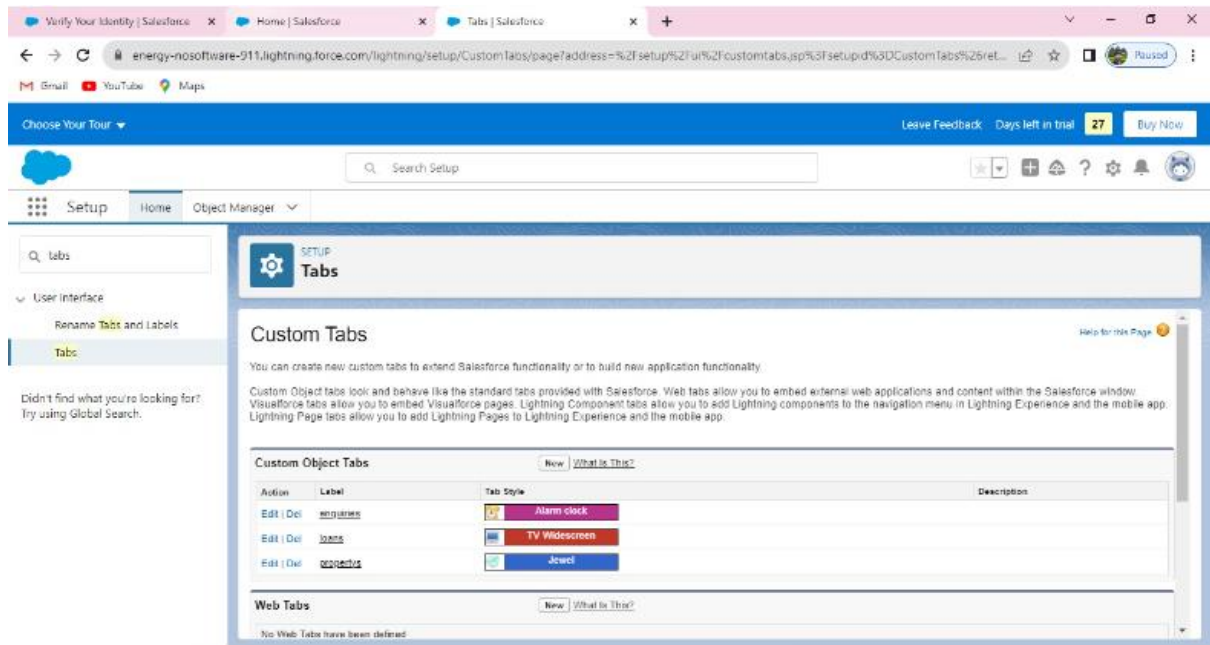
The screenshot shows the Salesforce user profile page for a user named RAJA. S. The page features a blue header with navigation links like 'Choose Your Tour', 'Leave Feedback', and 'Days left in trial 26'. Below the header is a search bar and a navigation menu with items like 'property managem...', 'enquiries', 'propertys', 'loans', and 'Dashboards'. The main profile area includes a circular profile picture of a cat, the name 'RAJA. S', and a bio that says 'Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)'. There are also links to 'Edit' and 'User Detail'. Below the profile area, there are sections for 'Details' (with a link to 'About') and 'Related'.

STEP 2: CREATE THE OBJECT (PROPERTY & LOAN)

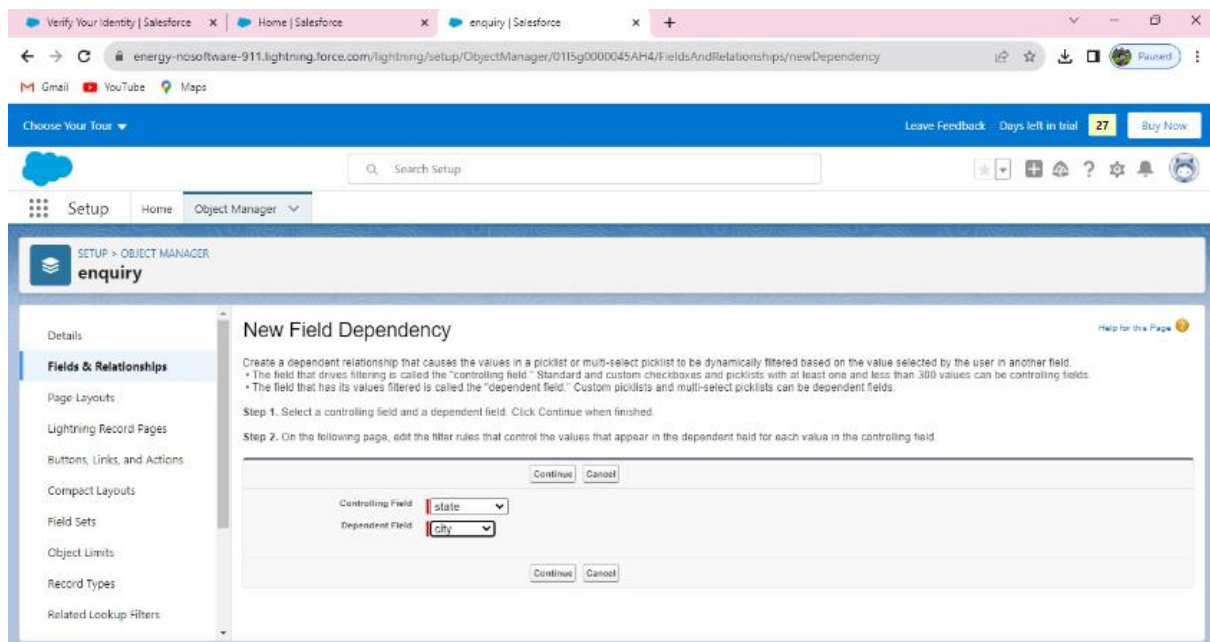
The screenshot shows the Salesforce Object Manager page. The page has a blue header with navigation links like 'Choose Your Tour', 'Leave Feedback', and 'Days left in trial 27'. Below the header is a search bar and a navigation menu with items like 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Object Manager' and shows a list of objects. The table below contains the following data:

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

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



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



energy-nosoftware-911.lightning.force.com/lightning/setup/ObjectManager/0115g0000045AH9/FieldsAndRelationships/view

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

Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
property

Details

Fields & Relationships
5 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
enquires	enquires__c	Formula (Text)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
property Name	Name	Text(80)		✓

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

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

Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
loan

Details

Details

Edit Delete

Description

API Name
loan__c

Custom
✓

Singular Label
loan

Plural Label
loans

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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

Step 5 create page layout for property object

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

Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
property

Details

Page Layouts
3 Items, Sorted by Page Layout Name

Q Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
buy	RAJA, S, 22/10/2023, 11:05 am	RAJA, S, 22/10/2023, 11:06 am
property Layout	RAJA, S, 22/10/2023, 9:19 am	RAJA, S, 22/10/2023, 10:40 am
rent	RAJA, S, 22/10/2023, 11:09 am	RAJA, S, 22/10/2023, 11:10 am

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

STEP 6 : CREATE A RECORD TYPE FOR PROPERTY OBJECT

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Choose Your Tour', 'Leave Feedback', 'Days left in trial 26', and a 'Buy Now' button. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'SETUP > OBJECT MANAGER' and 'property'. The 'Record Type' section for 'Buy' is displayed. It includes a description: 'Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.' Below this, there is an 'Edit' button and a table showing the record type details.

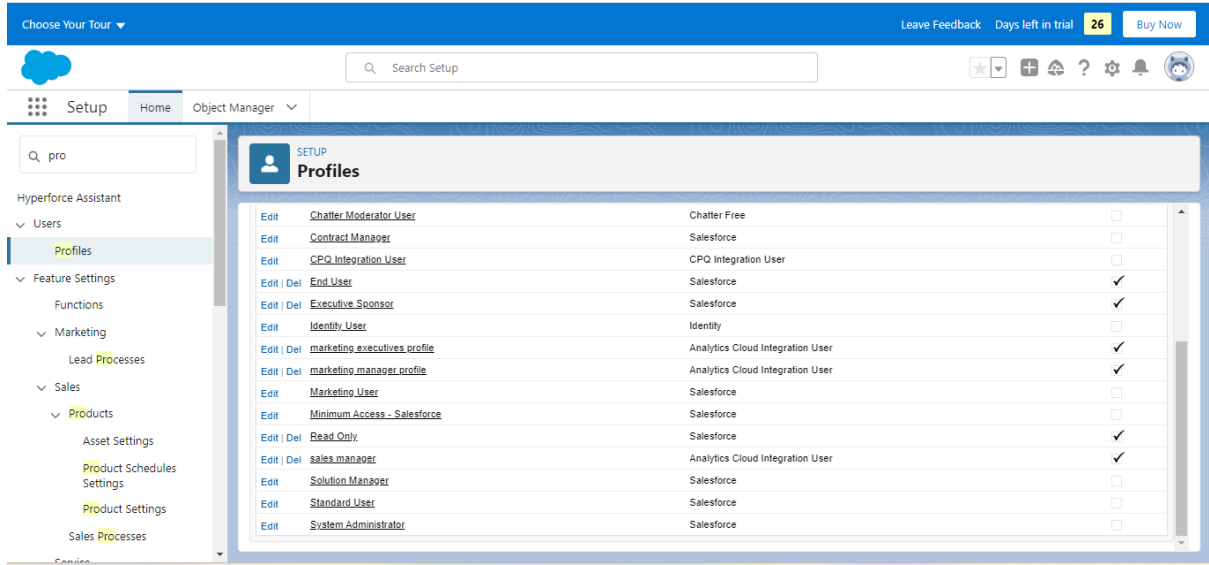
Record Type Label	Buy	Active	✓
Record Type Name	Buy		
Namespace Prefix			
Description			
Created By	RAJA S. 22/10/2023, 7:08 pm	Modified By	RAJA S. 22/10/2023, 7:08 pm

PAGE LAYOUT ASSIGNMENT

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Choose Your Tour', 'Leave Feedback', 'Days left in trial 26', and a 'Buy Now' button. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'SETUP > OBJECT MANAGER' and 'property'. The 'Page Layout Assignment' section for 'property' is displayed. It includes a description: 'The table below shows the page layout assignments for different record type and profile combinations.' Below this, there is an 'Edit Assignment' button and a table showing the page layout assignments for different record types and profiles.

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

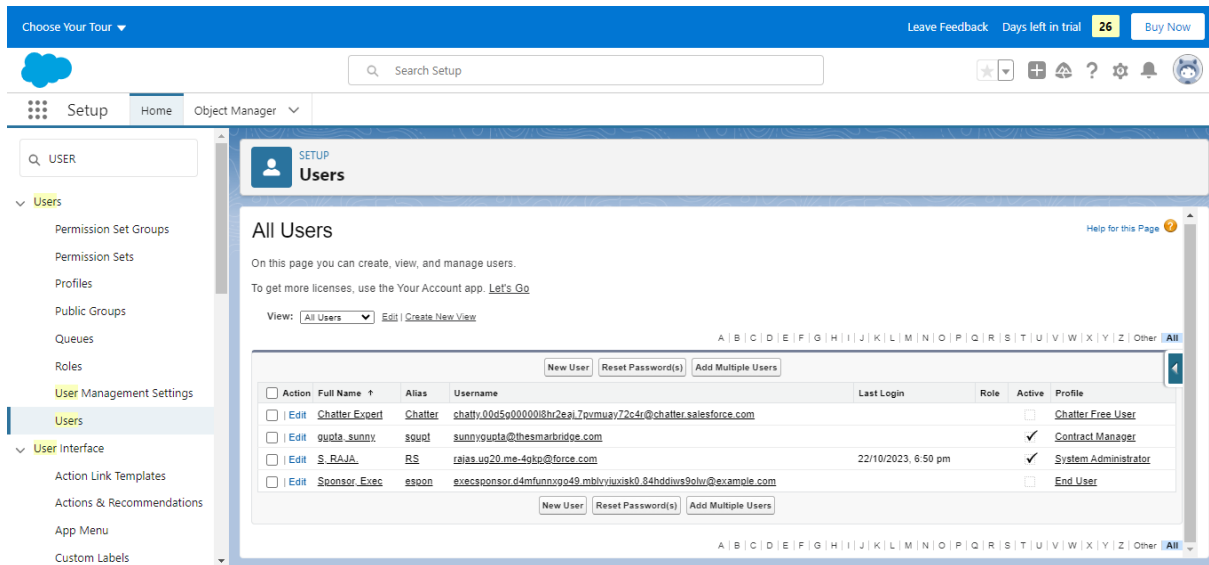
STEP 6 : TO CREATE A NEW PROFILE (SALES MANAGER ,MARKETING EXECUTIVE & SALES EXECUTIVE)



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a search bar with 'pro' and a list of navigation items including Users, Profiles, Feature Settings, Functions, Marketing, Lead Processes, Sales, Products, Asset Settings, Product Schedules Settings, Product Settings, and Sales Processes. The main content area displays a table of profiles with columns for Edit, Delete, Name, Role, and a checkbox. The table lists various profiles such as Chatter Moderator User, Contract Manager, CPQ Integration User, End User, Executive Sponsor, Identity User, marketing executives profile, marketing manager profile, Marketing User, Minimum Access - Salesforce, Read Only, sales manager, Solution Manager, Standard User, and System Administrator. The 'marketing executives profile', 'marketing manager profile', and 'sales manager' profiles have checkboxes checked.

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

STEP 7 : CREATE USER



The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar contains a search bar with 'USER' and a list of navigation items including Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, User Interface, Action Link Templates, Actions & Recommendations, App Menu, and Custom Labels. The main content area displays the 'All Users' page with a table of users. The table has columns for Action, Full Name, Alias, Username, Last Login, Role, Active, and Profile. The table lists four users: Chatter Expert, guda_sunny, S_RAJA, and Sponsor_Exec. The 'S_RAJA' user is highlighted in yellow.

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter.00d5g0000008hr2eal7qumay72c4r@chatter.salesforce.com			<input type="checkbox"/>	Chatter Free User
Edit	guda_sunny	soud	sunnyguda@thesmarbride.com			<input checked="" type="checkbox"/>	Contract Manager
Edit	S_RAJA	RS	raias.sr20.me-4gtp@force.com	22/10/2023, 6:50 pm		<input checked="" type="checkbox"/>	System Administrator
Edit	Sponsor_Exec	espo	execspnsor.d4mfunnxpc49.mblvviuxisk0.84hddiws9olw@example.com			<input type="checkbox"/>	End User

STEP 8 CREATE THE PERMISSION SET

The screenshot shows the Salesforce Setup interface. The top navigation bar includes "Choose Your Tour", "Leave Feedback", "Days left in trial 26", and a "Buy Now" button. The left sidebar shows the "Setup" menu with "Permission Set Groups" and "Permission Sets" highlighted. The main content area is titled "Permission Sets" and contains a table of existing permission sets.

Action	Permission Set Label	Description	License
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Clone	SeaS Indexing C2C User Perm	Allows the user to access entities indexed by SeaS indexin...	Cloud Integration User
Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
Clone	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Acc...	Your Account App
Del Clone	sales.rep3		
Del Clone	sales.rep4		
Del Clone	sales.rep5		

STEP 9 (SETUP FOR OWD)

The screenshot shows the Salesforce Setup interface for "Sharing Settings". The left sidebar shows the "Setup" menu with "Sharing Settings" highlighted. The main content area is titled "Sharing Settings" and contains a table of organization-wide defaults.


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

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

CREATE

Choose Your Tour ▾

Leave Feedback Days left in trial 26 Buy Now



★

+

🔍

?

⚙️

🔔

👤

property managem...

enquiries ▾

propertyts ▾

loans ▾

Dashboards ▾

* RAJA. S ▾

×

 enquiry

SUNNY

New Contact Edit New Opportunity ▾

Related

Details

* enquiry Name

SUNNY

Owner

 RAJA. S

enquiry number

2

state

rajasthan ▾

[View all dependencies](#)

city

--None-- ▾

[View all dependencies](#)

Created By

 RAJA. S, 22/10/2023, 7:42 pm

Last Modified By

 RAJA. S, 22/10/2023, 7:42 pm


Cancel

Save

VIEW

Choose Your Tour ▾

Leave Feedback Days left in trial 26 Buy Now



★

+

🔍

?

⚙️

🔔

👤

property managem...

enquiries ▾

propertyts ▾

loans ▾

Dashboards ▾

* RAJA. S ▾

×

 enquiry

SUNNY

New Contact Edit New Opportunity ▾

Related

Details

enquiry Name

SUNNY

enquiry number

2

state

rajasthan

city

--None--

Owner

 RAJA. S

Created By

 RAJA. S, 22/10/2023, 7:42 pm


Last Modified By

 RAJA. S, 22/10/2023, 7:42 pm

DELETE

Choose Your Tour ▾

Leave Feedback Days left in trial 26 Buy Now



★

+

🔍

?

⚙️

🔔

👤

property managem...

enquiries ▾

propertyts ▾

loans ▾

Dashboards ▾

* RAJA. S ▾

×

 enquiry

SUNNY

New Contact Edit New Opportunity ▾

Related

Details

* enquiry Name

SUNNY

enquiry number

2

state

rajasthan ▾

city

--None-- ▾

Created By

 RAJA. S, 22/10/2023, 7:42 pm

Last Modified By

 RAJA. S, 22/10/2023, 7:42 pm

Cancel

Save

Delete enquiry

Are you sure you want to delete this enquiry?

Cancel

Delete

STEP 11: REPORT

CREATE A REPORT

Choose Your Tour

Leave Feedback Days left in trial 26 Buy Now

Search...

Star Plus Minus Help Settings Notifications Profile

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

Reports

Recent

3 items

Search recent reports...

New Report New Folder

Star

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

To Do List

STEP 12 CREATE DASHBOARD

Home | Salesforce

sunny | Salesforce

energy-nosoftware-911.lightning.force.com/one/one.app#eyJjb21wb251bnREZWYiOiJkZXNrdG9wRGFzaG9yYXJkczpkYXNoYm9hcmQjLCJldHRyaW11dGVzajp7Im...

Gmail YouTube Maps

Choose Your Tour

Leave Feedback Days left in trial 26 Buy Now

property managem...

enquiries

propertys

loans

Dashboards

sunny

+ Component + Filter

Save Done

Sample Report: Users Logged In

Sum of Active

1

rajesh.ug20.me-4p1p@force.com

Username

View Report (Sample Report: Users Logged In)

Sample Report: # of Reports

Record Count

143

Created Date

October 2023

View Report (Sample Report: # of Reports)

STEP13 FLOWS

CLASSIC EMAIL TEMPLATE

The screenshot shows the Salesforce 'Classic Email Templates' setup page. The left sidebar contains a navigation menu with 'Email' expanded, showing 'Classic Email Templates' and 'Classic Letterheads'. The main content area is titled 'Classic Email Templates' and shows details for a 'Text Email Template' named 'loan amount pay remainder'. The details include 'Email Template Name', 'Template Unique Name', 'Encoding', 'Author', 'Description', 'Created By', 'Available For Use', 'Last Used Date', 'Times Used', and 'Modified By'. There are 'Edit', 'Delete', and 'Clone' buttons for the template details. Below the details is a section for the 'Email Template' with a 'Send Test and Verify Merge Fields' button. The subject line is 'loan amount pay remainder'.

FLOWS

The screenshot shows the Salesforce Flow Builder interface. The top bar indicates the flow is 'due date for loan payment - V2'. The flow diagram consists of a 'Record-Triggered Flow' start node, followed by a 'Run Immediately' action node, and an 'End' node. The flow is currently 'Inactive' and was last modified 3 hours ago. The interface includes a 'Select Elements' button, an 'Auto-Layout' dropdown, and buttons for 'Run', 'Debug', 'View Tests', 'Activate', 'Save As', and 'Save'.

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

energy-nosoftware-911.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000002mGSYAA2

Gmail YouTube Maps

Flow Builder | due date for loan payment - V1

Select Elements

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

Record-Triggered Flow Start

Run Immediately

End

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

loan

Configure Trigger

* Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements:

None

CREATE THE RECORD TO TEST THE FLOW

Choose Your Tour

Leave Feedback Days left in trial 26 Buy Now

Search...

property managem... enquiries propertyts loans Dashboards

loans

Recently Viewed

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

New Import Change Owner

Search this list...

	loan id ↑
1	LN-0005