



PROJECT TITLE:

Property Management Application using Salesforce

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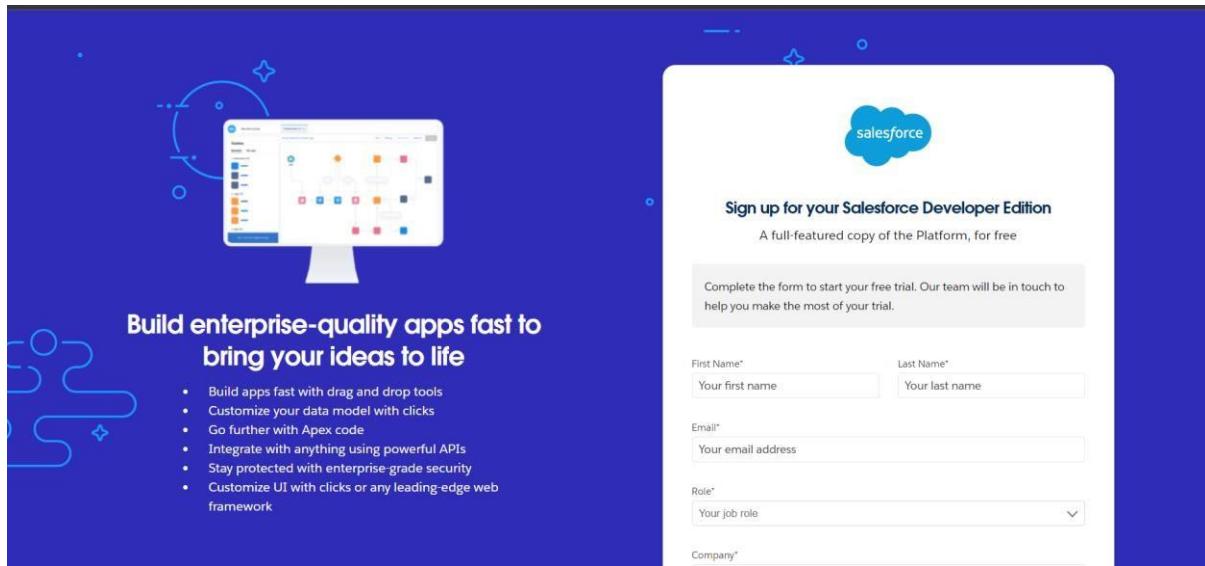
TEAM NUMBER: 200

Task 1: Creation of Developer Org

We have to create a salesforce developer org.

As we have successfully created the org using salesforce developer link

<https://developer.salesforce.com/signup>



Task 2: Creation of object in salesforce account

What Is Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization.
What are the types of Salesforce objects

Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

For this Property Management we need to create 3 objects Enquiry, Property, Loan.

Creating Custom Objects:

The below steps will assist you in creating those objects.

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

4. On the Custom Object Definition page, create the object as follows:
5. Label: Enquiry
6. Plural Label: Enquires
7. Record Name:
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.
11. In the same way create other objects such as Property and Loan.

Enquiry Object:

Object Manager - Enquiry

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name Enquiry_c
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label Enquiry
Field Sets	Plural Label Enquires
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	
Enable Reports ✓	
Track Activities	
Track Field History	
Deployment Status Deployed	
Help Settings Standard salesforce.com Help Window	

Same like about steps create Property:

Property Object:

Object Manager - Property

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name Property_c
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label Property
Field Sets	Plural Label Properties
Object Limits	
Record Types	
Related Lookup Filters	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	
Enable Reports ✓	
Track Activities	
Track Field History	
Deployment Status Deployed	
Help Settings Standard salesforce.com Help Window	

Loan Object:

The screenshot shows the Salesforce setup interface for managing objects. The top navigation bar indicates 'SETUP > OBJECT MANAGER' and the specific object being managed is 'Loan'. On the left, there's a sidebar with various configuration links: 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 is titled 'Details' and contains several configuration fields:

- Description: A text input field.
- API Name: Set to 'Loan_c'.
- Custom: A dropdown menu showing 'Custom' selected.
- Singular Label: Set to 'Loan'.
- Plural Label: Set to 'Loans'.
- Enable Reports: A checked checkbox.
- Track Activities: A checked checkbox.
- Track Field History: An unchecked checkbox.
- Deployment Status: Set to 'Deployed'.
- Help Settings: Standard salesforce.com Help Window.

At the bottom right of the main area are 'Edit' and 'Delete' buttons.

Now let's Create a custom Tab:

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

- 1.Types of Tab
- 2.Custom object tab
- 3.Web tab
- 4.Visualforce tab

Task 2: Creating a Lightning Tab

Steps to follows to create Tab are:

For Enquiry

Property

Loan

- 1)Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)
- 2)Select Object(Property) ? Select the tab style ? Next (Add to profiles page) keep it asdefault ? Next (Add to Custom App) keep it as default ? Save.Activity4:

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area has a header 'SETUP Tabs' with a 'Help for this Page' link. Below the header, there's a section titled 'Custom Tabs' with a note about creating new custom tabs. Three tables follow:

- Custom Object Tabs**: Shows tabs for 'Enquiries' (Apple), 'Loans' (Bell), and 'Properties' (Balls).
- Web Tabs**: Shows a note 'No Web Tabs have been defined'.
- Visualforce Tabs**: Shows a note 'No Visualforce Tabs have been defined'.

Task 4: Creating a Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

There are two types of app -

Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce Chatter, App Launcher, etc are present in it.

Note: The description, Logo, and Label of standard app cannot be altered.

Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

Note: Logos for Custom Apps can be changed.

Create Property Management App:

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter Property Management as the App Name, then click Next

4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Enquiry, Property, Loan, Reports, and Dashboards and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

The screenshot shows two related pages from the Salesforce Lightning Experience:

Lightning Experience App Manager

This page lists 22 items under the TabSet Type. The table includes columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The "Property Management" app is selected, highlighted in blue.

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
Marketing	Marketing	Best-in-class on-demand marketing automation	26/06/2023, 1:31 pm	Classic	✓
Platform	Platform	The fundamental Lightning Platform	26/06/2023, 1:31 pm	Classic	✓
Property Management	Property_Management	(Lightning Experience) Lets sales reps work with multiple records on one ...	26/06/2023, 3:38 pm	Lightning	✓
Queue Management	QueueManagement	Create and manage queues for your business.	26/06/2023, 1:31 pm	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	26/06/2023, 1:31 pm	Classic	✓
Sales Console	LightningSalesConsole	Manage your sales process with accounts, leads, opportunities, and more	26/06/2023, 1:31 pm	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	26/06/2023, 1:31 pm	Classic	✓
Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	26/06/2023, 1:33 pm	Lightning	✓
Service	Service	Manage customer service with accounts, contacts, cases, and more	26/06/2023, 1:31 pm	Classic	✓
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records ac...	26/06/2023, 1:31 pm	Lightning	✓
Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com...	26/06/2023, 1:31 pm	Classic	✓
Subscription Management	PowerCloudConsole	Get started automating your recurring revenue...	26/06/2023, 1:31 pm	Lightning	✓

Lightning App Builder

This page shows the "Property Management" app settings. The "App Details & Branding" tab is active.

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 button)
- Primary Color Hex Value: #0070D2
- Org Theme Options: (checkbox)

App Launcher Preview

PM Property Management

Lightning App Builder | App Settings | Pages | Property Management

App Settings

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Options

Navigation and Form Factor i

* Navigation Style
 Standard navigation
 Console navigation

* Supported Form Factors
 Desktop and phone
 Desktop
 Phone

Setup and Personalization i

Setup Experience
 Setup (full set of Setup options)
 Service Setup

App Personalization Settings

Disable end user personalization of nav items in this app
 Disable temporary tabs for items outside of this app

Lightning App Builder | App Settings | Pages | Property Management

App Settings

Utility Items (Desktop Only)

App Details & Branding

App Options

Utility Items (Desktop Only) Edit

Navigation Items

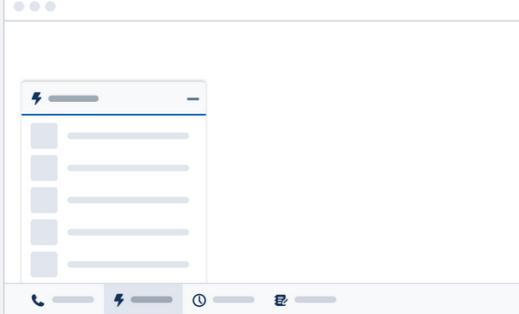
User Profiles

Utility Items (Desktop Only)

Add Utility Item

Utility Bar Alignment Default

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



To enable the utility bar for this app, add a utility item.

The screenshot shows the 'Navigation Items' configuration screen in the Lightning App Builder. On the left, a sidebar lists 'App Settings' (App Details & Branding, App Options, Utility Items (Desktop Only)), 'Navigation Items' (selected), and 'User Profiles'. The main area is titled 'Navigation Items' with a sub-instruction: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' Below this is a 'Available Items' list containing various Salesforce objects like Accounts, Alert Settings, All Sites, etc., with a search bar and a 'Create' button. To the right is a 'Selected Items' list containing 'Enquiries', 'Properties', and 'Loans', with up and down arrows for reordering.

The screenshot shows the 'User Profiles' configuration screen in the Lightning App Builder. On the left, a sidebar lists 'App Settings' (App Details & Branding, App Options, Utility Items (Desktop Only)), 'Navigation Items' (selected), and 'User Profiles' (selected). The main area is titled 'User Profiles' with a sub-instruction: 'Choose the user profiles that can access this app.' Below this is a 'Available Profiles' list containing various user profiles like Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, etc., with a search bar. To the right is a 'Selected Profiles' list containing 'Marketing Executive', 'Sales Manager', 'Marketing Manager', 'Sales Executive', 'System Administrator', 'Standard User', and 'Standard Platform User', with up and down arrows for reordering.

Task 5: Creation of Fields

Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

- 1.Types of Fields
- 2.Standard Fields

3. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Creation Of Fields For The Enquiry Object Field.

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Enquiry.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text Area as the Data Type, click Next.
7. For Field Label, enter Address.
8. Click Next, Next, then Save & New.
9. Follow steps 1 to 3 and create two more Text type field - District & State.
10. Create URL type field & give property management website as the field label.
11. Select the Phone as the Data Type, then click Next.
12. For Field Label, enter Phone Number.
13. Click Next, Next, then Save & New.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Lead Number	Lead_Number__c	Auto Number		
Owner	OwnerId	Lookup(User,Group)		
State	State__c	Picklist		

Create Picklist Field on enquiry Object

Create picklist fields on enquiry object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, Select enquiry Object

Now Select Fields and relationships from setup menu of the enquiry object.

1. Click new and select Picklist fields ???next and enter label name(State) and select enter values option((Maharashtra, Gujarat, Rajasthan),next and Save
2. Note: we create picklist fields for city follow the above steps just change the Labels and values.

Field Label	State	Object Name	Enquiry
Field Name	State	Data Type	Picklist
API Name	State__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Set	Enquiry Custom Field: State ~ Salesforce - Developer Edition		
Compliance Categorization			
Created By	SAKETH CHILUKA 26/06/2023, 5:40 pm	Modified By	SAKETH CHILUKA 26/06/2023, 5:40 pm

Create Field Dependency(on enquiry objects)

1. Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.
2. The below steps will assist you in creating Field Dependencies.
3. Click on the gear icon and then select Setup.
4. Click on the object manager tab just beside the home tab.
5. After the above steps, Select enquiry Object
6. Now Select Fields and relationships from setup menu of the enquiry object.
7. Click Field Dependencies.
8. Click New.
9. Select State as the Controlling Field and select City as the Dependent Field.
10. Click Continue.
11. Select the appropriate Value in each column by double-clicking them.
12. Maharashtra:i) Nashik
- 13.
14. Click Include Values. And it is also same for Gujarat & Rajasthan with its city.
15. Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.
16. Click Close to close the preview window.
17. Click Save.

The screenshot shows the 'Edit Field Dependency' page in the Salesforce Setup. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. The main area shows a grid with three columns: State, Maharashtra, Gujarat, and Rajasthan. The grid contains the following data:

State:	Maharashtra	Gujarat	Rajasthan
City:	mumbai gandhi nagar	mumbai gandhi nagar	jaipur

A legend on the right side of the grid indicates that yellow cells represent 'Included Value' and grey cells represent 'Excluded Value'.

For Property Object:

Create the remaining Fields:

Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for Below Fields.

- 1.Customer name (lookup relationship related to Enquiry)
 - 2.Create Property Type: (Picklist fields) (Residential, Commercial, Industrial) (Field Dependency)
 - 3.Residential: Picklist fields (1BHK, 2BHK, 3BHK) (Field Dependency)
 - 4.Commercial: Picklist fields (Shop, Office) (Field Dependency)
 - 5.Industrial: Picklist fields (Factory, Mall) (Field Dependency)
- Note: In above picklist fields Property type is control field and Residential, Commercial, Industrial is dependent field
- 6.State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
 - 7.City:(Take Any City for Field Dependency)
- Note: In above picklist fields State is a control fields and city is dependent field
- 8.Discount:(Percentage As the Field Data Type)
 - 9.Price: (Number As the Field Data Type)
 - 10.Loan Amount: (Currency As the Field Data Type)

The screenshots illustrate the setup of a custom object 'Property' in the Salesforce Object Manager.

Screenshot 1: Property Object Configuration

This screenshot shows the 'Fields & Relationships' tab selected in the 'Object Manager' for the 'Property' object. The 'Values' section is expanded, displaying a table of picklist values:

Action	Values	API Name	Modified By
<input type="checkbox"/> Edit Del Deactivate	1BHK	1BHK	SAKETH CHILUKA, 26/05/2023, 5:58 pm
<input type="checkbox"/> Edit Del Deactivate	2BHK	2BHK	SAKETH CHILUKA, 26/05/2023, 5:58 pm
<input type="checkbox"/> Edit Del Deactivate	3BHK	3BHK	SAKETH CHILUKA, 26/05/2023, 5:58 pm

Screenshot 2: Property Field Dependencies

This screenshot shows the 'Field Dependencies' section for the 'Property' object. It lists dependencies defined between fields:

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Property Type	Residential	Property Field Dependencies - Salesforce - Developer Edition, 23, 6:01 pm
Edit Del	Property Type	Commercial	SAKETH CHILUKA, 26/05/2023, 6:01 pm
Edit Del	Property Type	Industrial	SAKETH CHILUKA, 26/05/2023, 6:02 pm

Setup Home Object Manager

SETUP > OBJECT MANAGER Property

Fields & Relationships

Controlling Field: Property Type
Dependent Field: Residential

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Click button to include or exclude selected values from the dependent picklist.

Showing Columns: 1 - 3 (of 3) < Previous Next > View All Go to		
Property Type:	Residential	Edit Field Dependency – Salesforce - Developer Edition
Residential:	1BHK 2BHK 3BHK	1BHK 2BHK 3BHK

Click button to include or exclude selected values from the dependent picklist.

Save Cancel Preview

Setup Home Object Manager

SETUP > OBJECT MANAGER Property

Fields & Relationships

Controlling Field: Property Type
Dependent Field: Commercial

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Click button to include or exclude selected values from the dependent picklist.

Showing Columns: 1 - 3 (of 3) < Previous Next > View All Go to		
Property Type:	Residential	Edit Field Dependency – Salesforce - Developer Edition
Commercial:	Shop Office	Commercial Shop Office

Click button to include or exclude selected values from the dependent picklist.

Save Cancel Preview

Setup Home Object Manager

SETUP > OBJECT MANAGER Property

Fields & Relationships

Controlling Field: Property Type
Dependent Field: Industrial

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Click button to include or exclude selected values from the dependent picklist.

Showing Columns: 1 - 3 (of 3) < Previous Next > View All Go to		
Property Type:	Residential	Edit Field Dependency – Salesforce - Developer Edition
Industrial:	Factory Mall	Industrial Factory Mall

Click button to include or exclude selected values from the dependent picklist.

Save Cancel Preview

For Loan Object

Create the remaining Fields:

Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for
Below Fields

1. Property name: (lookup relationship related to property)
2. Customer name: (lookup relationship related to Enquiry)
3. Interest Rate: (Select the Field Data Type As Currency)
4. Term: (Select the Field Data type as Number)
5. Annual Loan: Field create the Number as the field data type
6. Total Loan Installments: (Field create the Number as the field data type)
7. Loan Repayment: (Field create the Number as the field data type)
8. Loan Amount: (Select the Field data type as Formula)

For the Loan Object? Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula

$$(\text{Loan_Repayment_c} * (((1+(\text{Interest_Rate_c}/52))^{\text{Term_c}}) - 1)) / ((\text{Interest_Rate_c}/52) * ((1+(\text{Interest_Rate_c}/52))^{\text{Term_c}}))$$

The screenshot shows the Salesforce setup interface for managing object fields. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Property' under 'SETUP > OBJECT MANAGER'. The left sidebar lists various configuration sections: Details, Fields & Relationships (selected), 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 'Fields & Relationships' section displays 22 items, sorted by Field Label. It includes columns for Field Name, Label, Type, and Description. A 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are at the top right. The table rows are as follows:

Field Name	Label	Type	Description
Loan Amount	Loan_Amount__c	Currency(18, 0)	
Loan Money	Loan_Money__c	Formula (Text)	
Loan Object	Loan_Object__c	Formula (Currency)	
Loan Repayment	Loan_Repayment__c	Number(18, 0)	
Owner	OwnerId	Lookup(User,Group)	✓
Price	Price__c	Number(18, 0)	
Property name	Property_name__c	Lookup(Property)	✓
Property Name	Name	Text(80)	✓

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Id	Name	Auto Number		✓
Owner	OwnerId	Lookup(User,Group)		✓

Property Custom Field
Loan Amount

Custom Field Definition Detail

Field Information	Field Label: Loan Amount Field Name: Loan_Amount API Name: Loan_Amount_c Description: Help Text Data Owner: Field Usage Data Sensitivity Level: Compliance Categorization Created By: SAKETH CHILUKA 26/06/2023, 6:06 pm	Object Name: Property Data Type: Currency Validation Rules (0) Where is this used?
General Options	Required: <input type="checkbox"/> Default Value:	
Currency Options		

Task 6: Page Layout and Record type

Page Layout in Salesforce allows us to customize the design and organization of detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom object detail and edit pages.

Record types in Salesforce allow you to have different business processes, picklist values, and page layouts to different users based on profile.

Create page layout for Property Object:

Go to setup ? click on Object Manager ? type object name in search bar ? click on the object

Now click on “Page Layout” ? New.

Rent Page Layout

Create another page layout name as (Rent) with the help of above steps of activity 1. And remove the discount and loan amount fields from the rent page layout

The screenshot shows the Salesforce Object Manager interface for the 'Property' object. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts (which is selected and highlighted in blue), 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 'Page Layouts' and shows three items: 'Buy', 'Property Layout', and 'Rent'. Each item has a 'PAGE LAYOUT NAME' column, a 'CREATED BY' column (SAKETH CHILUKA), and a 'MODIFIED BY' column (SAKETH CHILUKA). There are also 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the list.

Record type for Property Object

Go to setup ? click on Object Manager ? type object name in search bar ? click on the object

Now click on “Record type ” ? New.

Enter the record type label as (Buy) and selective active checkbox next and save

The screenshot shows the Salesforce Object Manager interface for the 'Property' object. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types (which is selected and highlighted in blue). The main content area is titled 'Record Types' and shows two items: 'Buy' and 'Rent'. Each item has a 'RECORD TYPE LABEL' column, a 'DESCRIPTION' column (empty), an 'ACTIVE' column (with a checked checkbox), and a 'MODIFIED BY' column (SAKETH CHILUKA). There are also 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the list.

Page Layout Assignment

1. Go to setup ? click on Object Manager ? type object name in search bar ? click on the object
2. Now click on “page layout ” ? click page layout assignment
3. Select the buy record type and select page layout to use(buy) then click on save.

The screenshot shows the Salesforce Object Manager for the 'Property' object. The 'Page Layouts' tab is selected. A table displays page layout assignments for different record types and profiles. The 'Buy' record type is highlighted, and the 'Property Layout' is assigned to it. The table includes columns for Profiles, Record Types, Master, Buy, and Rent.

Profiles	Record Types	Master	Buy	Rent
Analytics Cloud Integration User	Page Layout Assignment: Property - SalesForce - Developer Edition	Property Layout	Property Layout	Property Layout
Analytics Cloud Security User		Property Layout	Property Layout	Property Layout
Chatter External User		Property Layout	Property Layout	Property Layout
Chatter Free User		Property Layout	Property Layout	Property Layout
Chatter Moderator User		Property Layout	Property Layout	Property Layout
Contract Manager		Property Layout	Property Layout	Property Layout
Cross Org Data Proxy User		Property Layout	Property Layout	Property Layout
Custom: Marketing Profile		Property Layout	Property Layout	Property Layout
Custom: Sales Profile		Property Layout	Property Layout	Property Layout
Custom: Support Profile		Property Layout	Property Layout	Property Layout
Force.com - App Subscription User		Property Layout	Property Layout	Property Layout
Force.com - Free User		Property Layout	Property Layout	Property Layout
Gold Partner User		Property Layout	Property Layout	Property Layout
Identity User		Property Layout	Property Layout	Property Layout
Marketing Executive		Property Layout	Property Layout	Property Layout
Marketing Manager		Property Layout	Property Layout	Property Layout

For Rent:

The screenshot shows the creation of a new page layout for the 'Property' object. The 'Page Layouts' tab is selected. A new layout named 'Rent' is being edited. The 'Fields' section shows fields like Section, Created By, Industrial, Loan Money, Price, and Record Type. The 'Property Sample' and 'Highlights Panel' sections are also visible.

Task-7- Profile

1. A profile is a group/collection of settings and permissions that define what a user can do in salesforce.
2. 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.
3. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative

Types of profiles in salesforce

Standard profiles:

1. By default salesforce provide below standard profiles.
2. We cannot deleted standard ones
3. Each of these standard one includes a default set of permissions for all of the standard objects available on the platform.
4. Custom Profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Marketing Executive	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Marketing Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>

Create Marketing Executive Profile

1. Then In The Profile Level Give Read and Create Access for Lead, property, loan objects to Marketing Executive profile and Read, Create, Edit, Delete for the Marketing manager profile for Lead, property, loan objects
2. Marketing Manager profile Should Have Access to Marketing Executive profile

Profile Detail

Name	Marketing Executive	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	SAKETH CHILUKA 27/06/2023, 12:43 am	Modified By	SAKETH CHILUKA 28/06/2023, 7:27 pm

Page Layouts

Standard Object Layouts	Global	Operating Hours
Email Application	Not Assigned [View Assignment]	Order [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product [View Assignment]
Account	Account Layout [View Assignment]	Payment [View Assignment]

Create Sales Executive Profile

Activity3- Create Sales Executive Profile:

Follow the Above Steps to create the Profile just change the Name for Below profiles clone profile (Standard Platform User) ,profile name (Sales executive profile). And assign a sales rep1 permission set

For Sales Rep1---->Read, Create, Edit for lead, property and loan objects.

For Sales Rep3----> Read only.

Note: above 2 are permission set and assign a permission set according to user need. We will discuss in next milestone.

The screenshot shows the Salesforce Setup interface for creating a new profile. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'prof'. The main content area is titled 'Profiles' and shows a single record for 'Sales Executive'. The profile details are as follows:

Name	Sales Executive
User License	Salesforce Platform
Description	
Created By	SAKETH CHILUKA 27/06/2023, 12:49 am
Modified By	SAKETH CHILUKA 28/06/2023, 7:22 pm

Below the profile details, the 'Page Layouts' section lists standard object layouts for various objects like Global, Email Application, Home Page Layout, and Account. Each layout has a 'View Assignment' link. The 'Operating Hours' section also lists assignments for different objects.

Task-8: User

- 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. The user account identifies the user, and the user account settings determine what features and records the user can access.

NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org,so If you don't find salesforce license then deactivate a user who has salesforce license Or change the license type from Salesforce to any other.

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit Chatter Expert	Chatter	chatty_00d21000000doh7eae.csiktoy0d510@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit CHILUKA, SAKETH	SCHI	saketh15@vitwap.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit Gupta, Sunny	Sani	sunnyguptasani@thesmartbridge.com		<input checked="" type="checkbox"/>	Sales Manager
<input type="checkbox"/>	Edit User, Integration	integ	integration@00d21000000doh7eae.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User, Security	sec	insightssecurity@00d21000000doh7eae.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Task-9: Permission Set

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. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

Permission Sets

Permission Set
Sales Rep Advance

API Name: Sales_Rep_Advance
Namespace Prefix:
Created By: SAKETH CHILUKA 27/06/2023, 12:57 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

Manage Assignment:

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top right contains 'perm'. On the left, a sidebar has 'Custom Permissions' highlighted. The main area shows a user record for 'Sunny Gupta' with fields like Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver. To the right, a list of 'Role' checkboxes includes 'Salesforce Sales Manager' (which is checked), 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations' (with a 'View' link), and 'Data.com User Type'. At the bottom, there's an 'Accessibility Mode (Classic Only)' checkbox.

Task-10: Set up for OWD

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

1. Public Read/Write/Transfer (only available of Leads and Cases)
2. Public Read/Write
3. Public Read/Only
4. Private

Create OWD setting

1. Setup, use the Quick Find box to find Sharing Settings.
2. Click Edit in the Organization-Wide Defaults area.
3. For each object, select the default access you want to give everyone.
4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Enquiry, Property custom object

- 5.Click Edit and from the Drop Down select private for internal and external
 6.This Setting is for all the User Which have been Created

Object	Sharing Rule	Action
Service Territory	Public Read/Write	Private
Shift	Private	Private
Streaming Channel	Public Read/Write	Private
Walllist	Private	Private
Web Cart Document	Private	Private
Work Order	Private	Private
Work Plan	Private	Private
Work Plan Template	Private	Private
Work Step Template	Private	Private
Work Type	Private	Private
Work Type Group	Public Read/Write	Private
Inquiry	Private	Private
Lead	Private	Private
Property	Private	Private

Other Settings:

- Standard Report Visibility:
- Manual User Record Sharing:
- Manager Groups:
- Secure guest user record access:
- Require permission to view record names in lookup fields:

Task-11: User Adoption

Create a Record(Enquiry)

1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.
4. Click new and fill details & Save

New Enquiry

* = Required Information

Information

Customer Name: sunny

Owner: SAKETH CHILUKA

Lead Number

State: Maharashtra

City: mumbai

Buttons: Cancel, Save & New, Save

View a Record(Enquiry)

1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.
4. Click on any record name. you can see the details of the Event

The screenshot shows a web-based application interface. At the top, there is a navigation bar with various links: Getting Started, Gmail, YouTube, Maps, Vellore Institute of Tec..., Welcome to V-PROPEL, VIT University - VTOP, VIT University - VTOP, Student Dashboard :: ..., and Multisim Live. Below the navigation bar is a header with a cloud icon, the text "Property Managem...", and a search bar labeled "Search...". The main content area displays an "Enquiry" record for "sunny". The record includes fields for Customer Name (sunny), Lead Number (LN-0002), State (Maharashtra), City (mumbai), Owner (SAKETH CHILUKA), Created By (SAKETH CHILUKA, 30/06/2023, 1:00 pm), and Last Modified By (SAKETH CHILUKA, 30/06/2023, 1:00 pm). The "Details" tab is currently selected.

Delete a Record(Enquiry)

1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

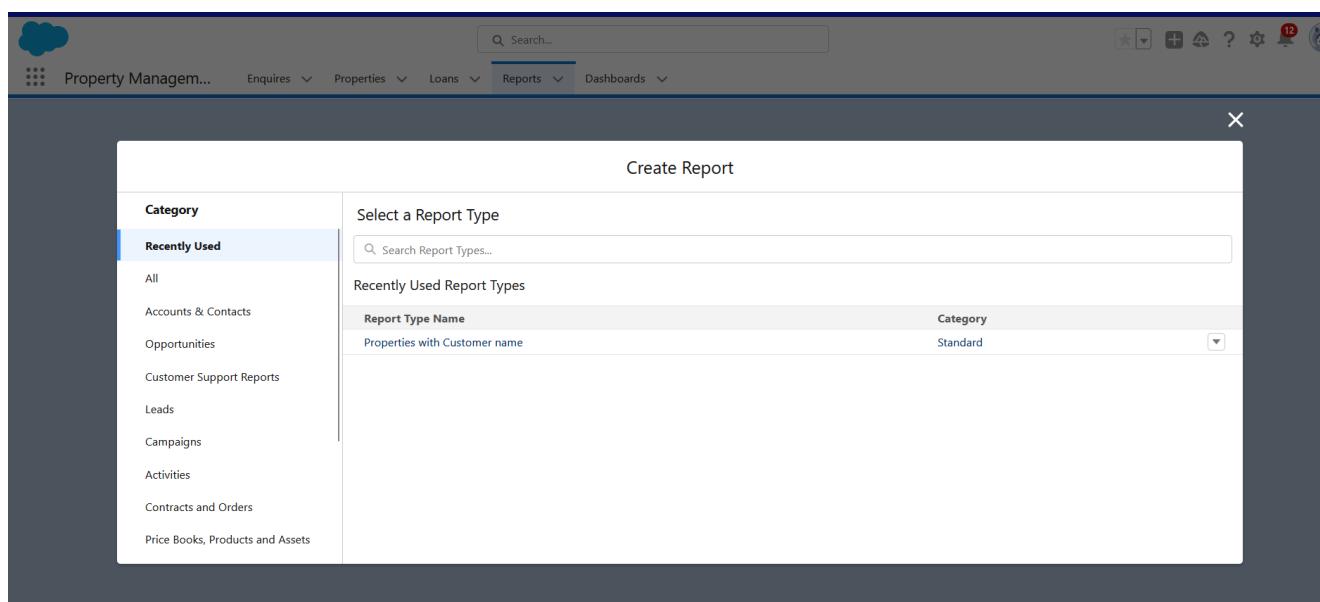
The screenshot shows a web-based application interface. At the top, there is a navigation bar with various links: Getting Started, Gmail, YouTube, Maps, Vellore Institute of Tec..., Welcome to V-PROPEL, VIT University - VTOP, VIT University - VTOP, Student Dashboard :: ..., and Multisim Live. Below the navigation bar is a header with a cloud icon, the text "Property Managem...", and a search bar labeled "Search...". The main content area displays a list titled "Recently Viewed" with one item: "1 item • Updated a few seconds ago". The list shows a single record with a checkbox next to "Customer Name" and the value "sunny". On the right side of the list, there is a context menu with options: "Edit", "Delete", and "Change Owner". The "Delete" option is highlighted with a blue background.

Task-12: Report

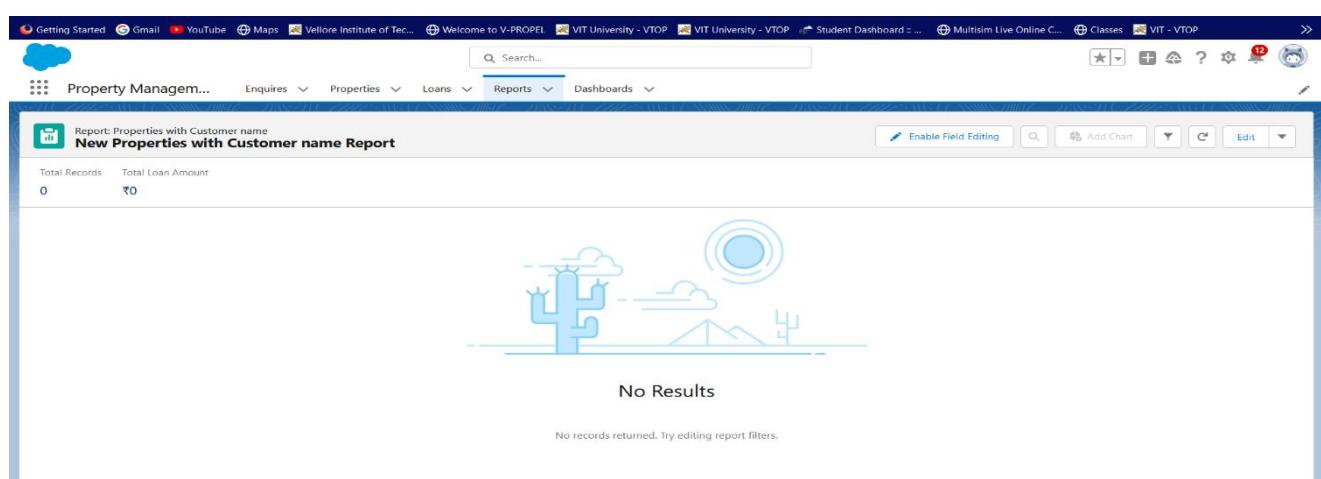
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

- Tabular
- Summary
- Matrix
- Joined Reports



As there is no data records generated the empty report is displayed



Task-13: Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Create dashboards

Follow the above steps

1.Create the Dashboard for the Same Take Any Type of Dashboard(Chart) And Display It on The App Home Page

The screenshot shows a property management application interface. At the top, there is a navigation bar with links for Enquiries, Properties, Loans, Reports, and Dashboards. Below the navigation bar is a search bar and a toolbar with various icons. A modal window titled "New Dashboard" is open, prompting the user to enter a Name (marked with a red asterisk), a Description, and a Folder (set to "Private Dashboards"). There are "Cancel" and "Create" buttons at the bottom of the modal. In the background, the main dashboard area shows a grid of cards. One card is visible, titled "Properties with Customer Name Report", with a sub-section titled "New Properties with Customer name Report". A message in this section states, "We can't draw this chart because there is no data." At the bottom left of the main dashboard area, there is a link "View Report (New Properties with Customer name Report)".

View Report and Dashboard

The screenshot shows the 'Reports' section of the Property Management system. The top navigation bar includes links for Enquiries, Properties, Loans, Reports (which is currently selected), and Dashboards. A search bar at the top right allows users to search for reports. Below the navigation is a table titled 'Recent' with one item: 'New Properties with Customer name Report'. The table has columns for REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. The report details are: Report Name - New Properties with Customer name Report, Description - Private Reports, Created By - SAKETH CHILUKA, Created On - 27/6/2023, 1:23 am. On the left sidebar, there are filters for 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. There are also sections for 'FOLDERS' (All Folders, Shared with Me) and 'FAVORITES'.

Dashboard:

The screenshot shows the 'Dashboards' section of the Property Management system. The top navigation bar includes links for Enquiries, Properties, Loans, Reports, and Dashboards (which is currently selected). A search bar at the top right allows users to search for dashboards. Below the navigation is a table titled 'Recent' with one item: 'Properties with Customer Name Report'. The table has columns for DASHBOARDS, Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The dashboard details are: Dashboard Name - Properties with Customer Name Report, Description - Private Dashboards, Created By - SAKETH CHILUKA, Created On - 27/6/2023, 1:26 am. On the left sidebar, there are filters for 'Created by Me', 'Private Dashboards', and 'All Dashboards'. There are also sections for 'FOLDERS' (All Folders, Shared with Me) and 'FAVORITES'.

*****END*****

