PROJECT TITLE:

Property Management Application using Salesforce

TEAM MEMBERS

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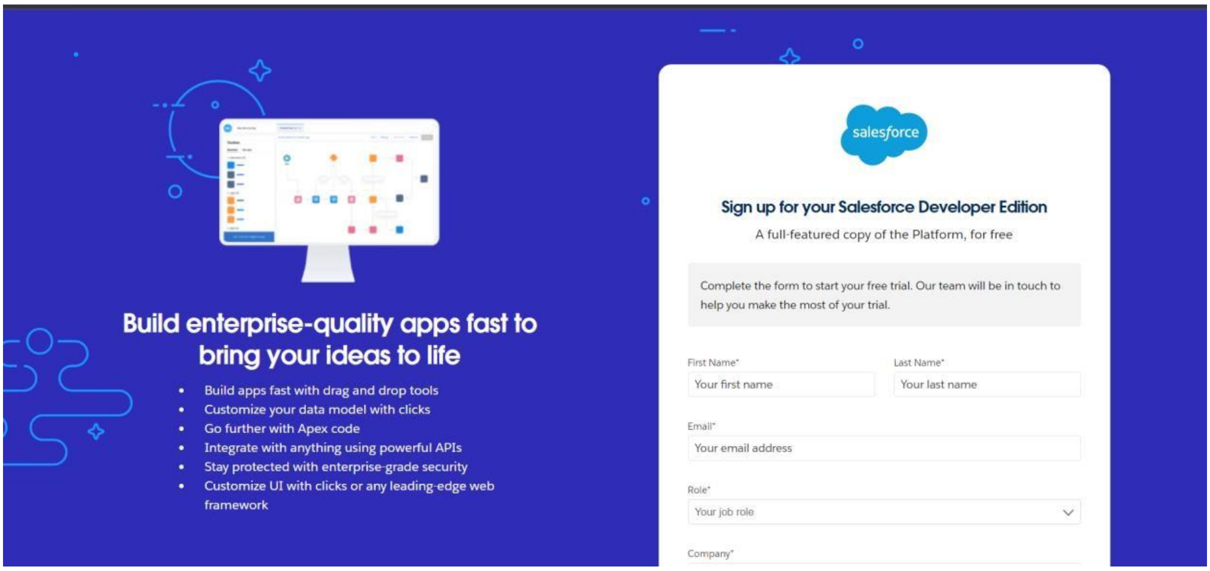
TEAM NUMBER: 200

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.

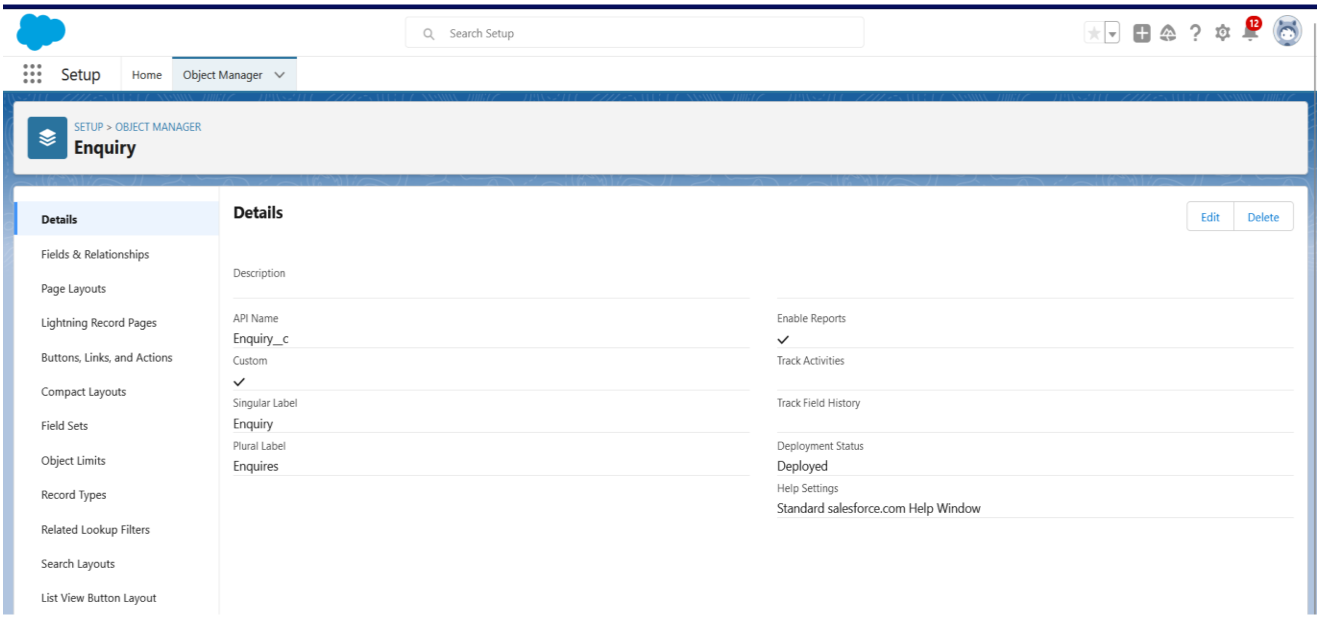
Creating Custom Objects:

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.

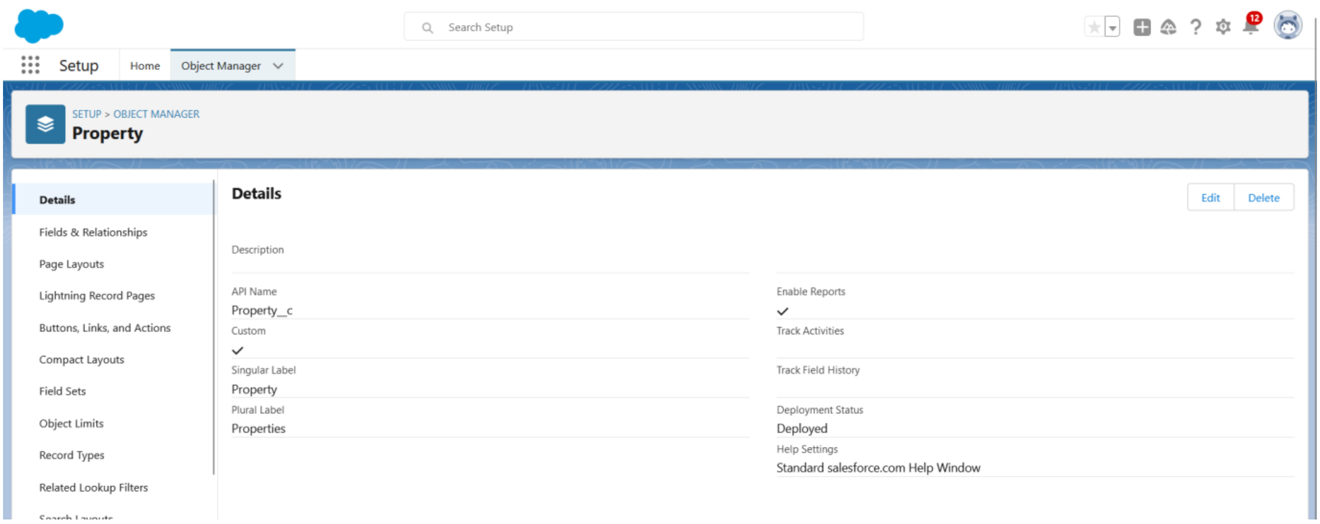
4. On the Custom Object Definition page, create the object as follows:
5. Label: Enquiry
6. Plural Label: Enquires
7. Record Name:
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.
11. In the same way create other objects such as Property and Loan.

Enquiry Object:

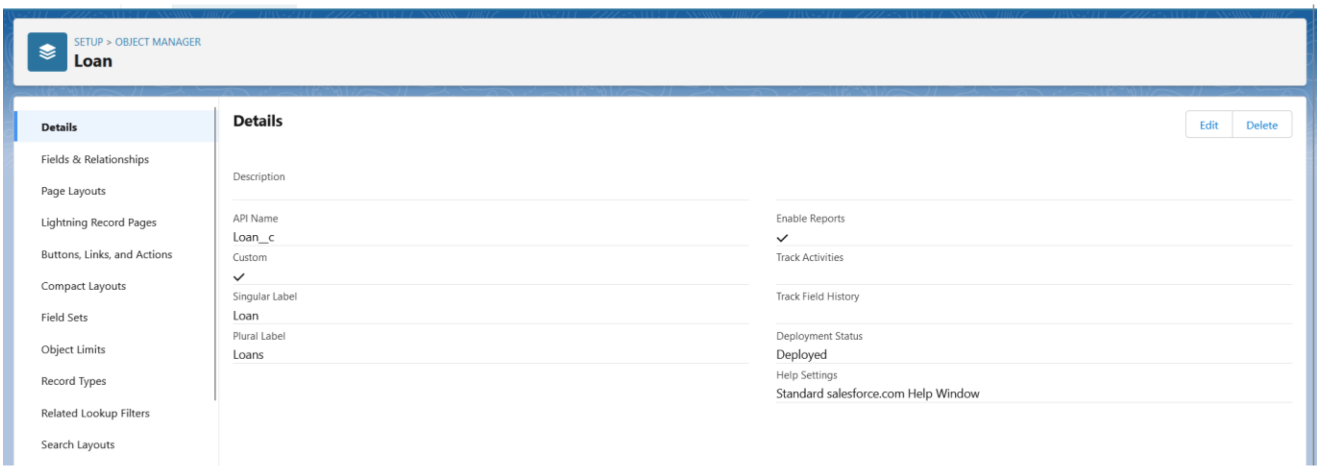


Same like about steps create Property:

Property Object:



Loan Object:



Now let's Create a custom Tab:

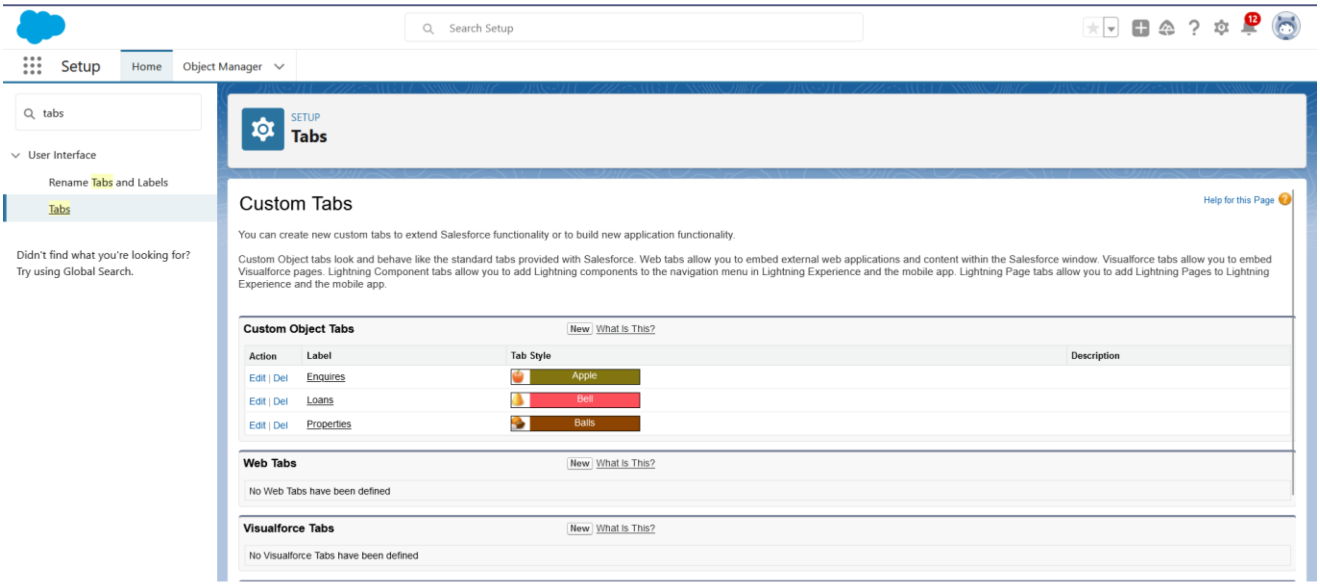
A tab is like a user interface that is used to build records for objects and to view the records in the objects.

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:



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.

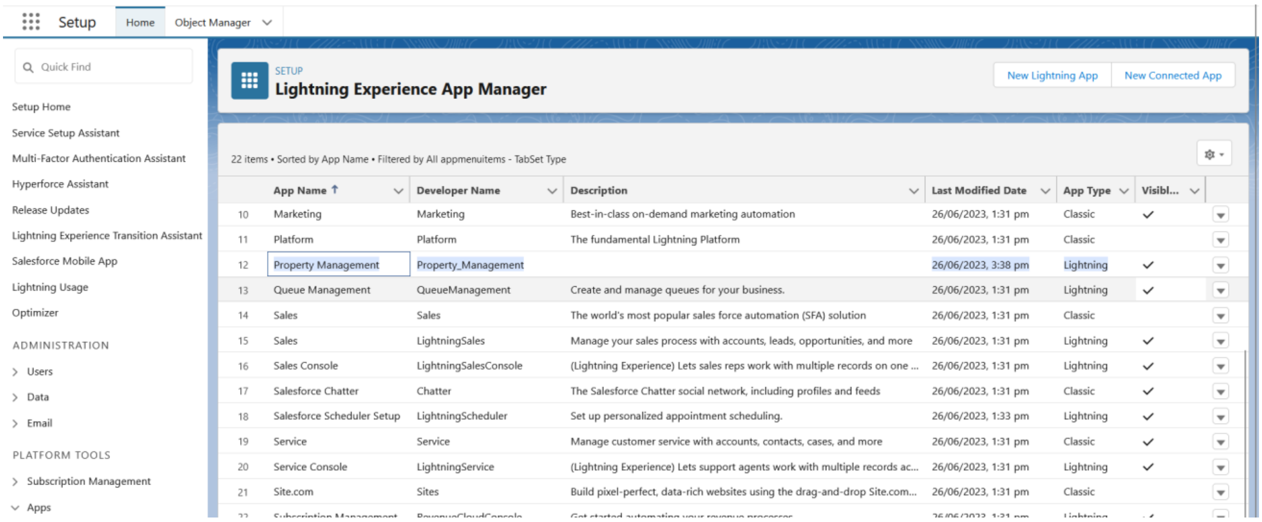
Note: The description, Logo, and Label of standard app cannot be altered.
Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

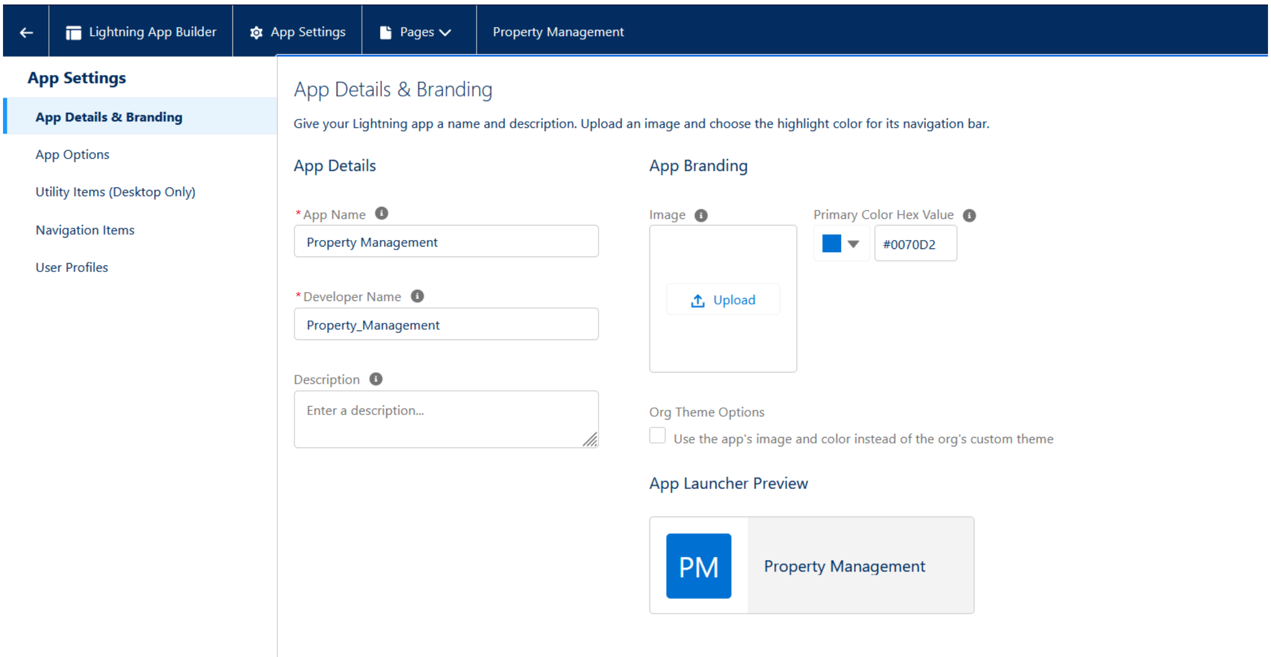
Note: Logos for Custom Apps can be changed.

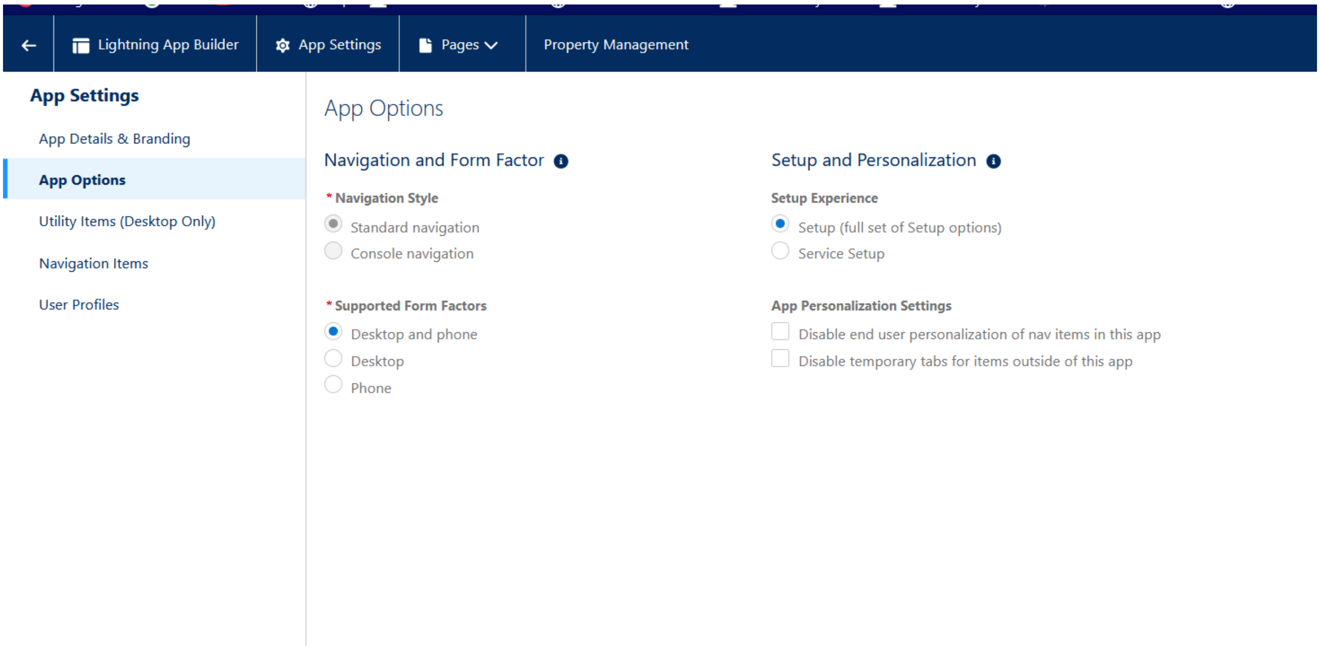
Create Property Management App:

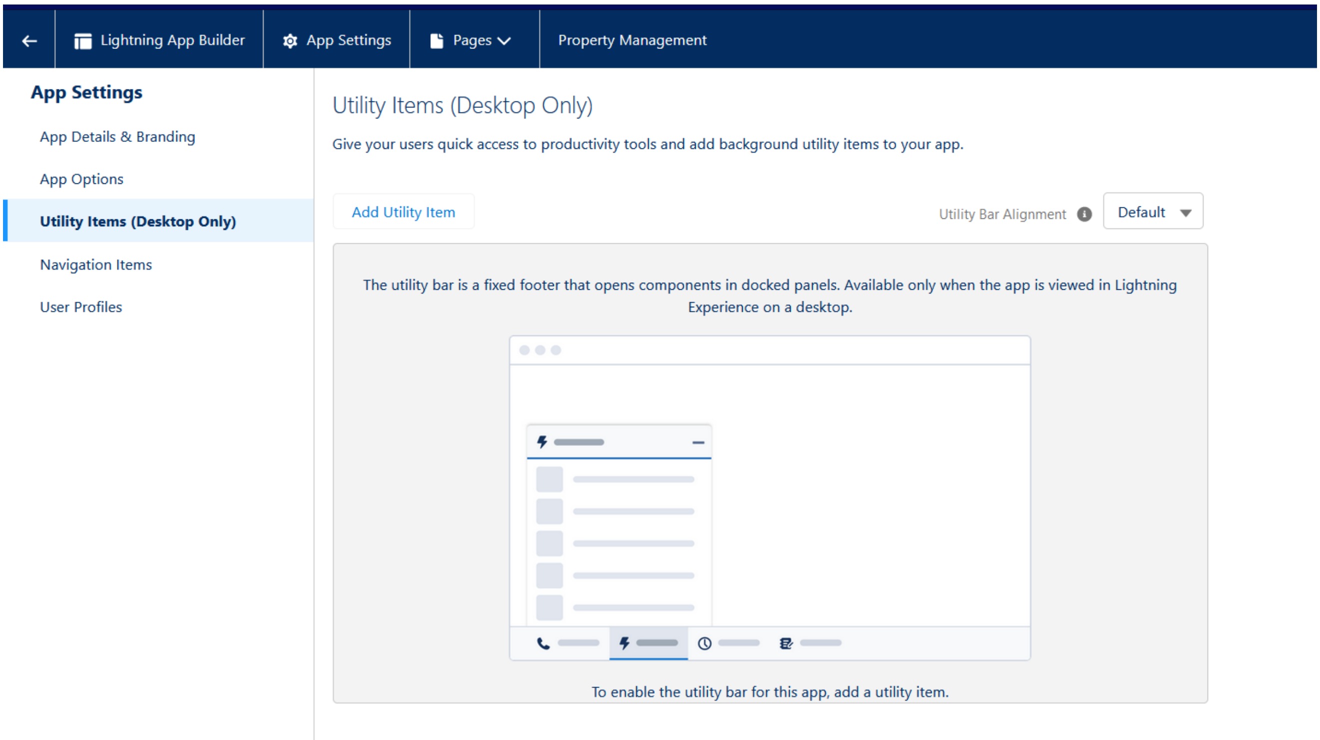
1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter Property Management as the App Name, then click Next

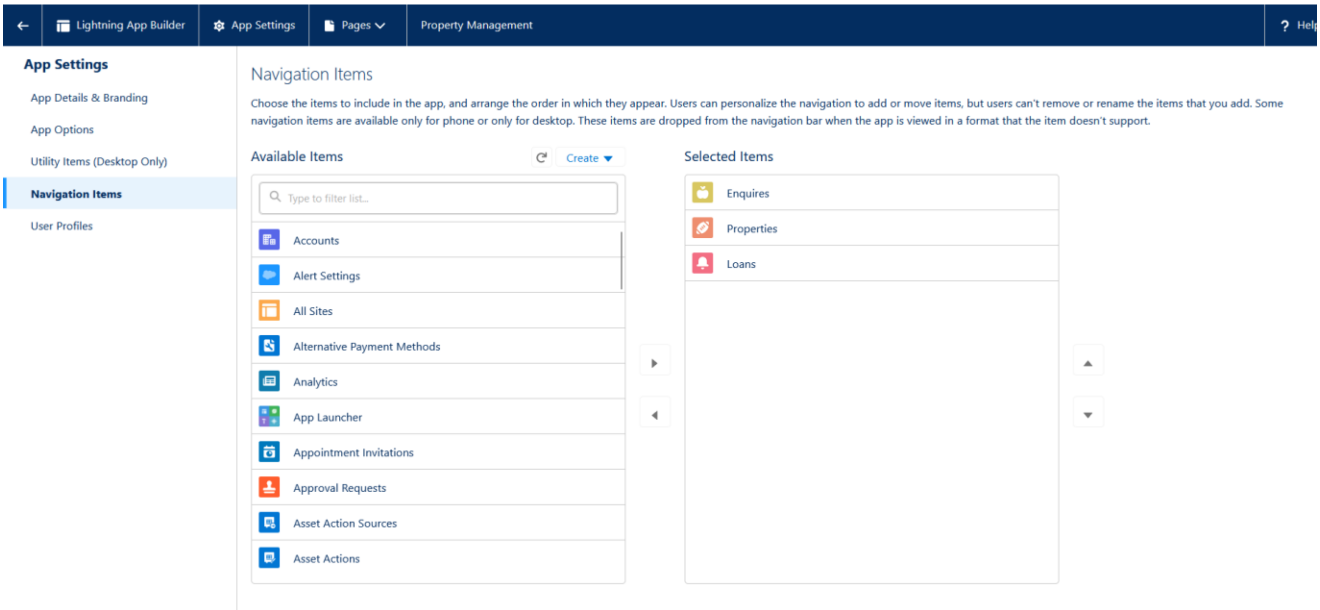
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Enquiry, Property, Loan, Reports, and Dashboards and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator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

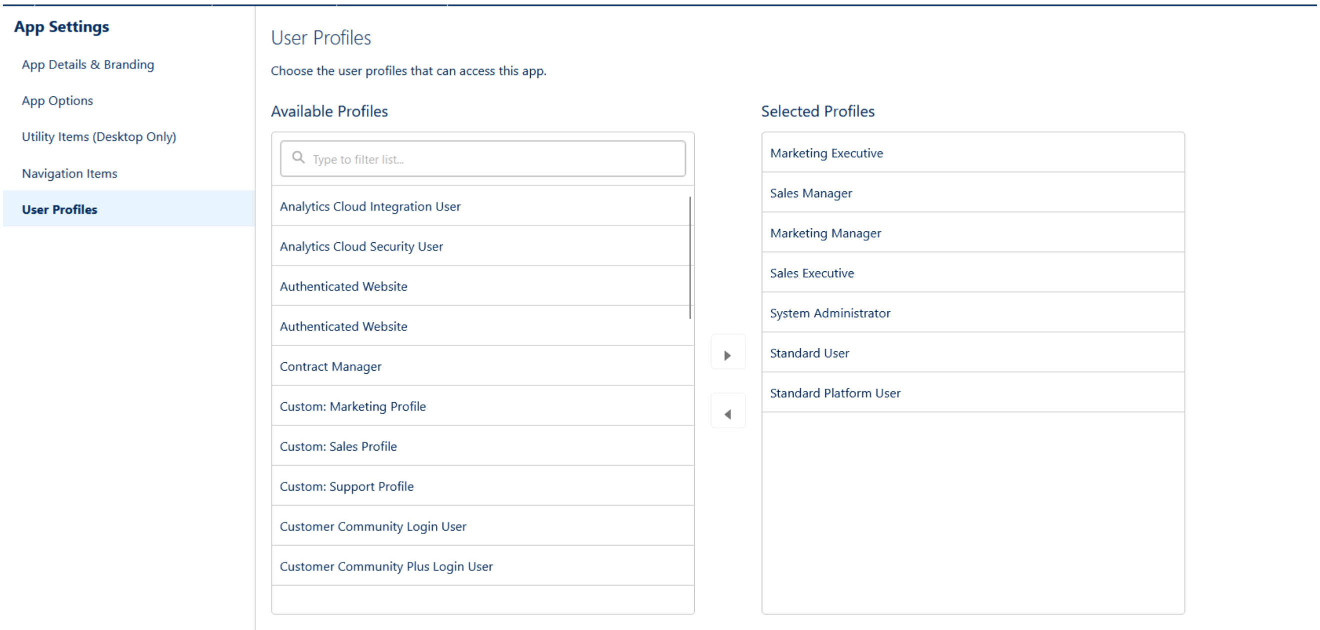





Lightning App Builder
App Settings
Pages
Property Management
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
App Options
Navigation and Form Factor
* Navigation Style
Standard navigation
Console navigation
* Supported Form Factors
Desktop and phone
Desktop
Phone
Setup and Personalization
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
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Utility Items (Desktop Only)
Give your users quick access to productivity tools and add background utility items to your app.
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.





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

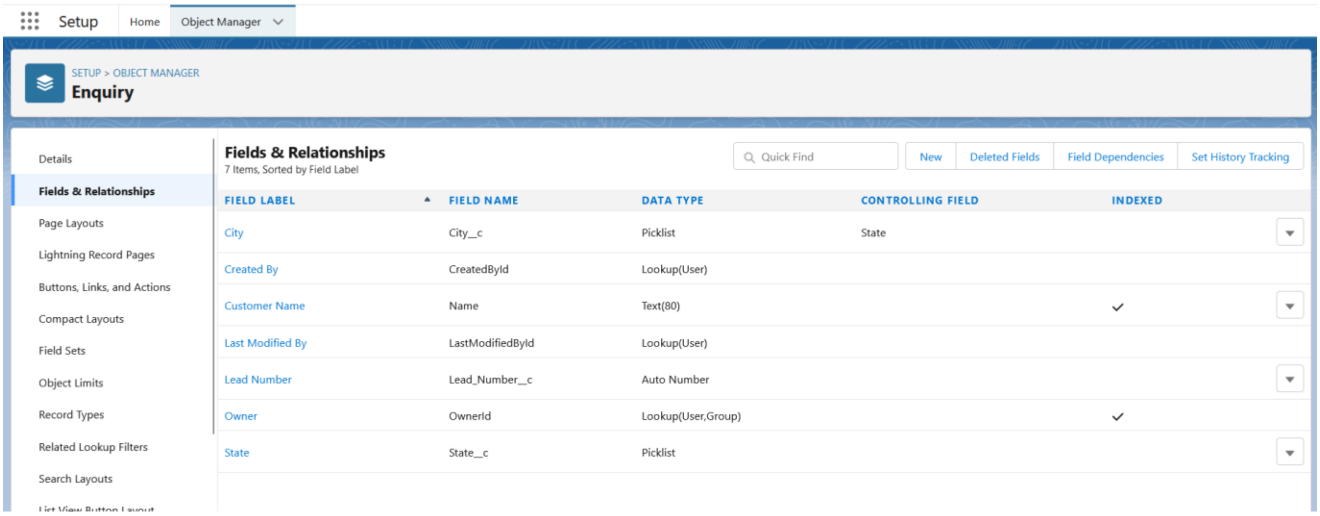
3.Custom Fields

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.



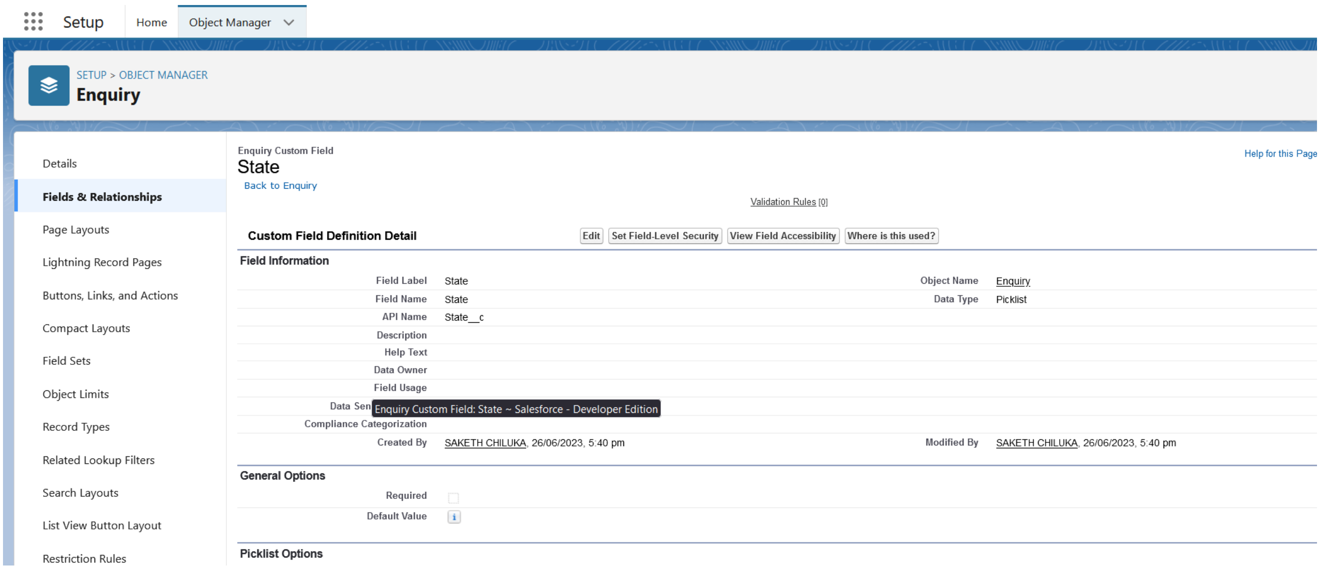
Create Picklist Field on enquiry Object

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

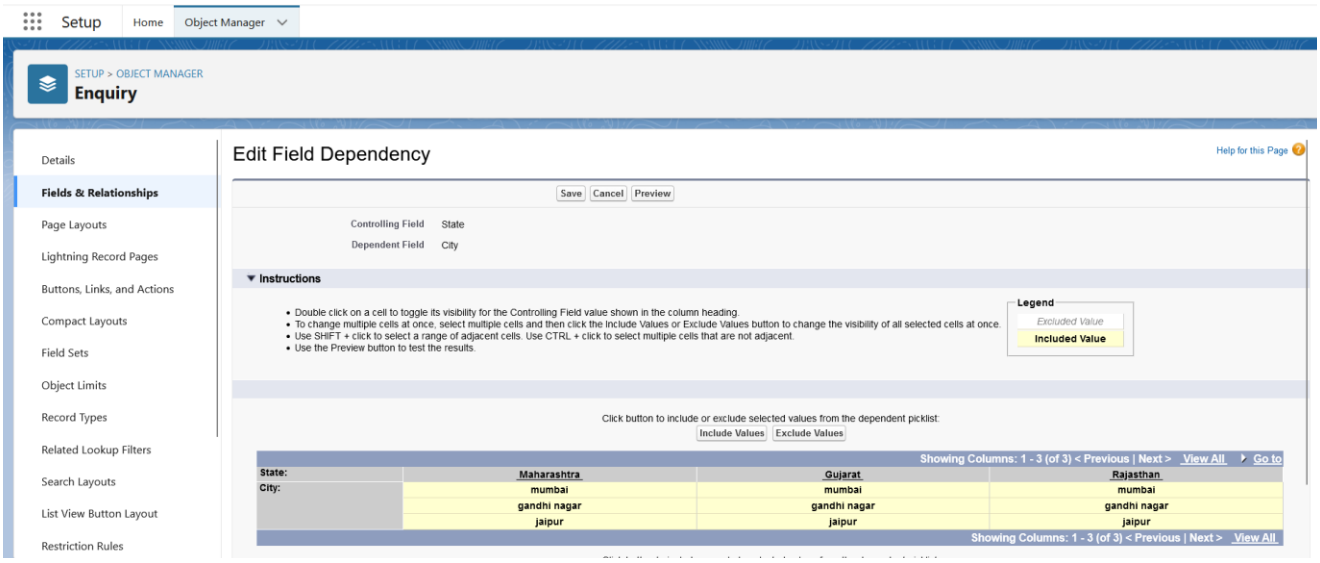
Now Select Fields and relationships from setup menu of the enquiry object.

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.



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.

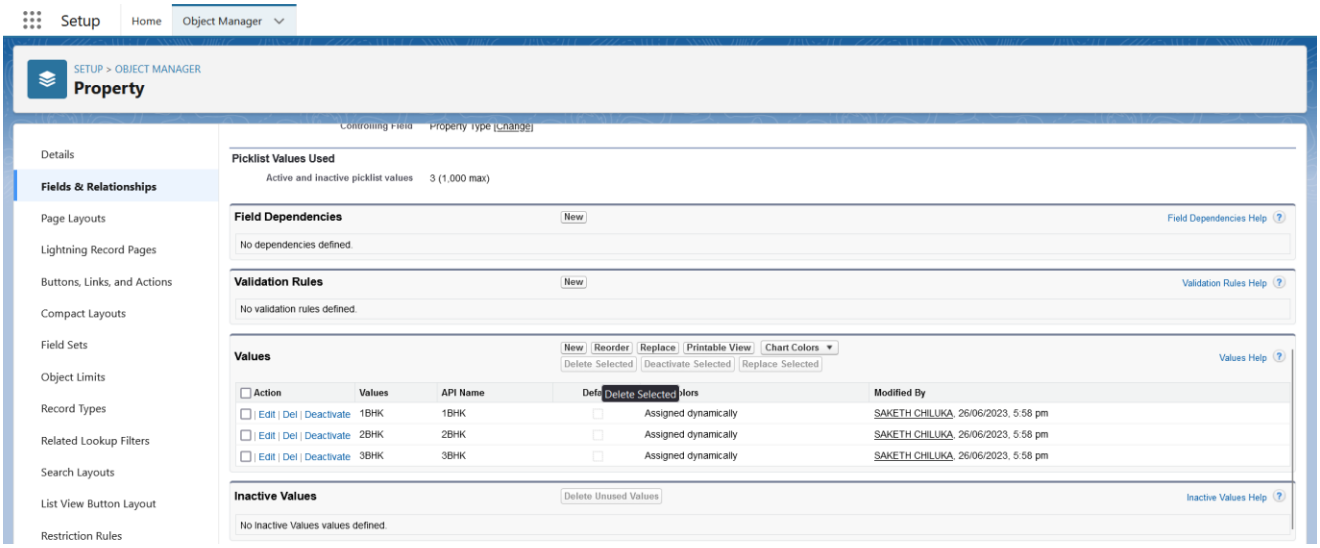


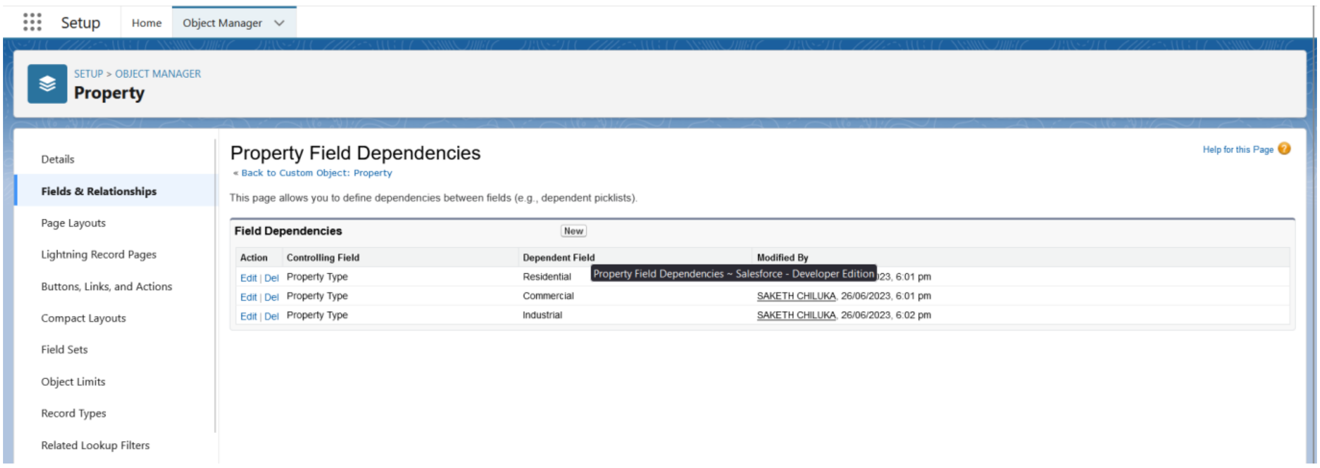
For Property Object:

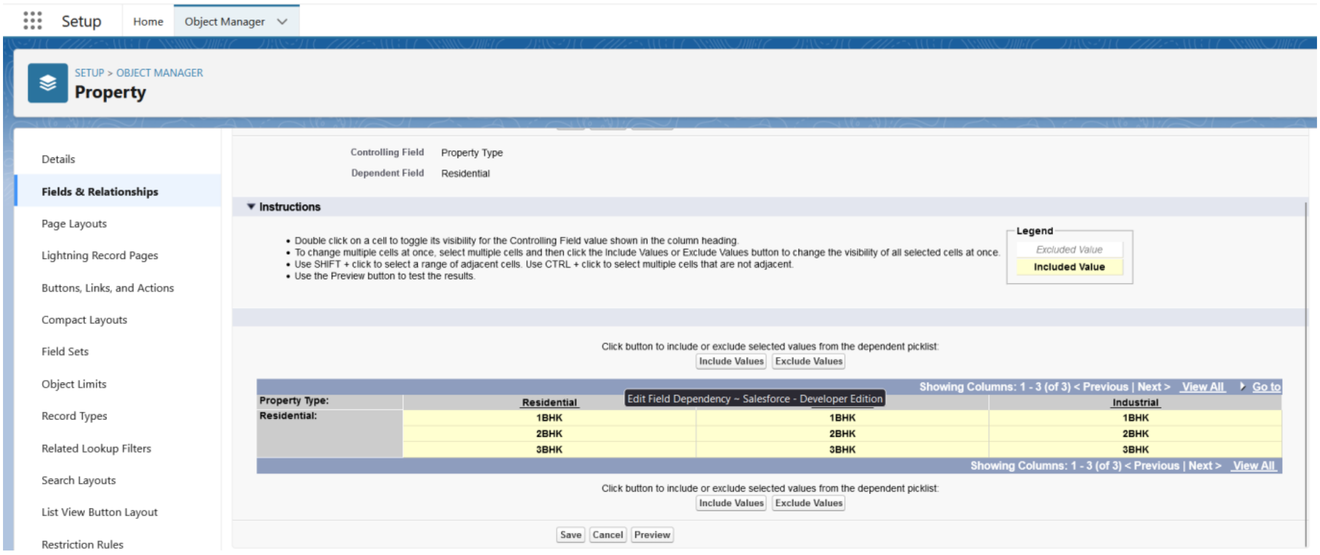
Create the remaining Fields:

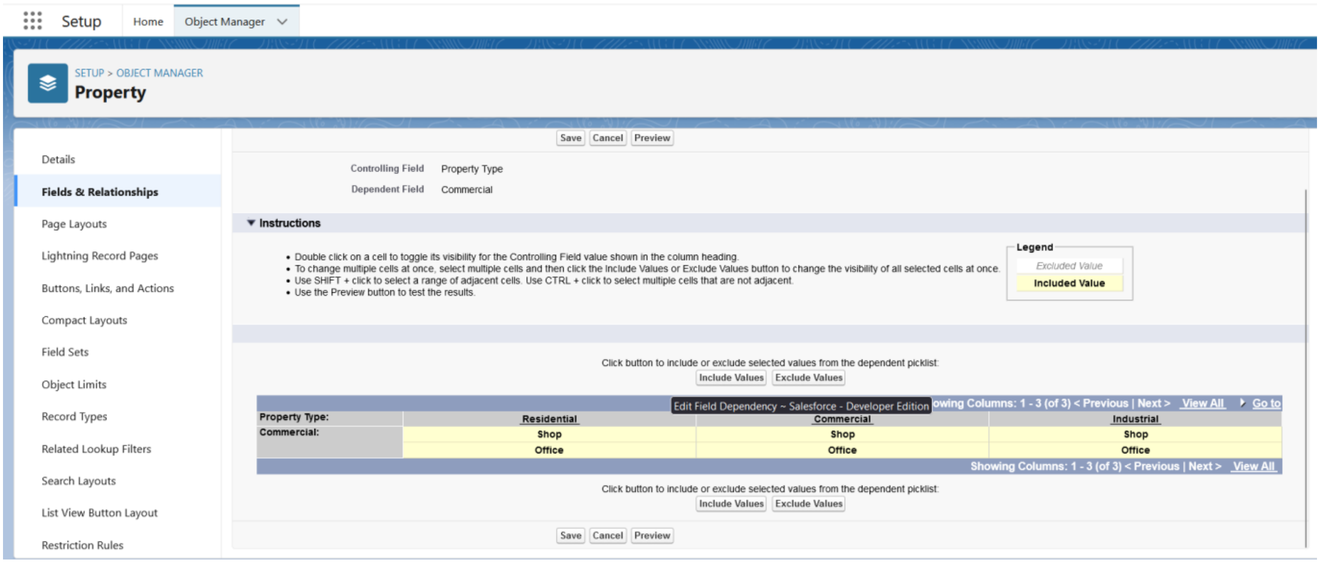
Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for Below Fields.

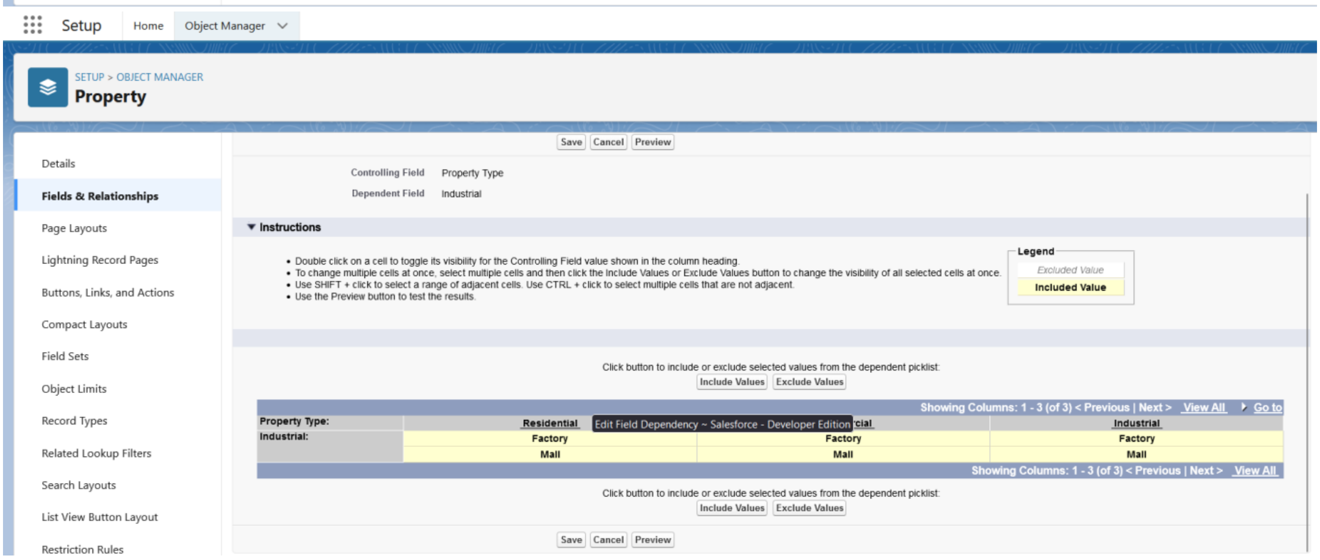
1.Customer name (lookup relationship related to Enquiry)
2.Create Property Type: (Picklist fields) (Residential, Commercial, Industrial) (Field Dependency)
3.Residential: Picklist fields (1BHK, 2BHK, 3BHK) (Field Dependency)
4.Commercial: Picklist fields (Shop, Office) (Field Dependency)
5.Industrial: 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)






Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Property
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
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.
Legend
Excluded Value
Included Value
Click button to include or exclude selected values from the dependent picklist:
Include Values
Exclude Values
Showing Columns: 1 - 3 (of 3) < Previous | Next > View All Go to
Edit Field Dependency ~ Salesforce - Developer Edition
Property Type:
Residential:
Residential
Industrial
1BHK
2BHK
3BHK
Save
Cancel
Preview


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Property
Save
Cancel
Preview
Controlling Field Property Type
Dependent Field Commercial
Instructions
Legend
Excluded Value
Included Value
Click button to include or exclude selected values from the dependent picklist:
Include Values
Exclude Values
Edit Field Dependency ~ Salesforce - Developer Edition
Property Type:
Commercial:
Residential
Commercial
Industrial
Shop
Office
Showing Columns: 1 - 3 (of 3) < Previous | Next > View All

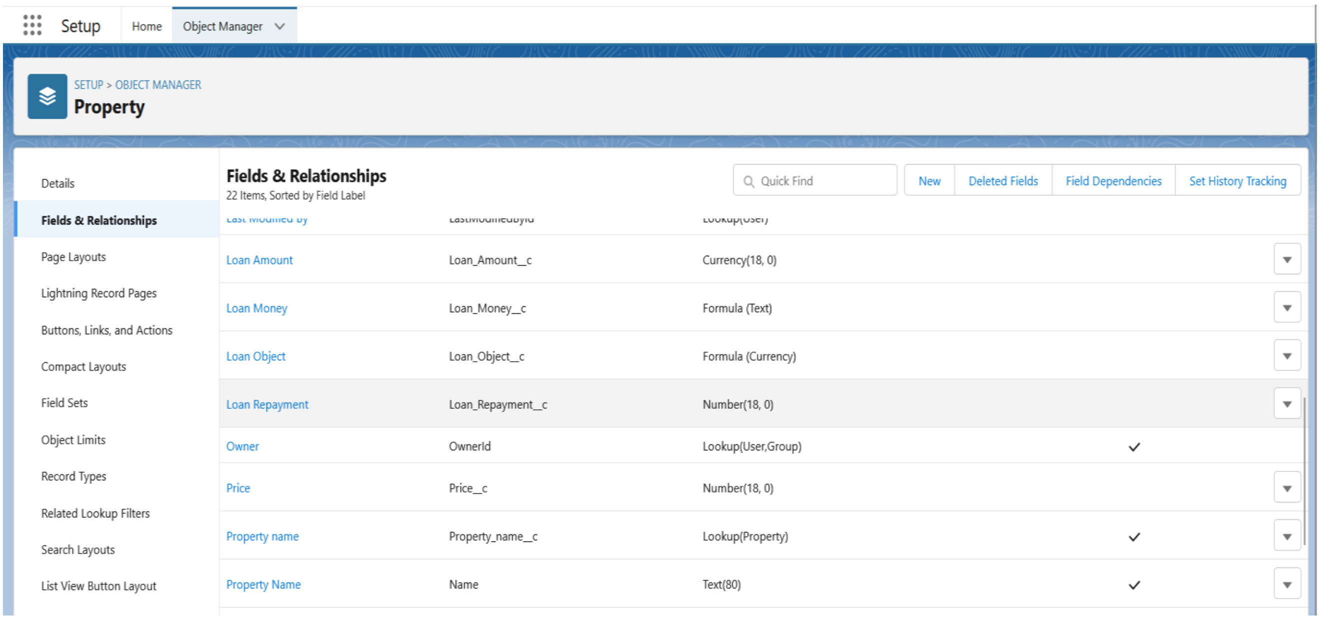

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Property
Save
Cancel
Preview
Controlling Field Property Type
Dependent Field Industrial
Instructions
Legend
Excluded Value
Included Value
Click button to include or exclude selected values from the dependent picklist:
Include Values
Exclude Values
Showing Columns: 1 - 3 (of 3) < Previous | Next > View All Go to
Edit Field Dependency ~ Salesforce - Developer Edition
Property Type:
Industrial:
Residential
Industrial
Factory
Mall

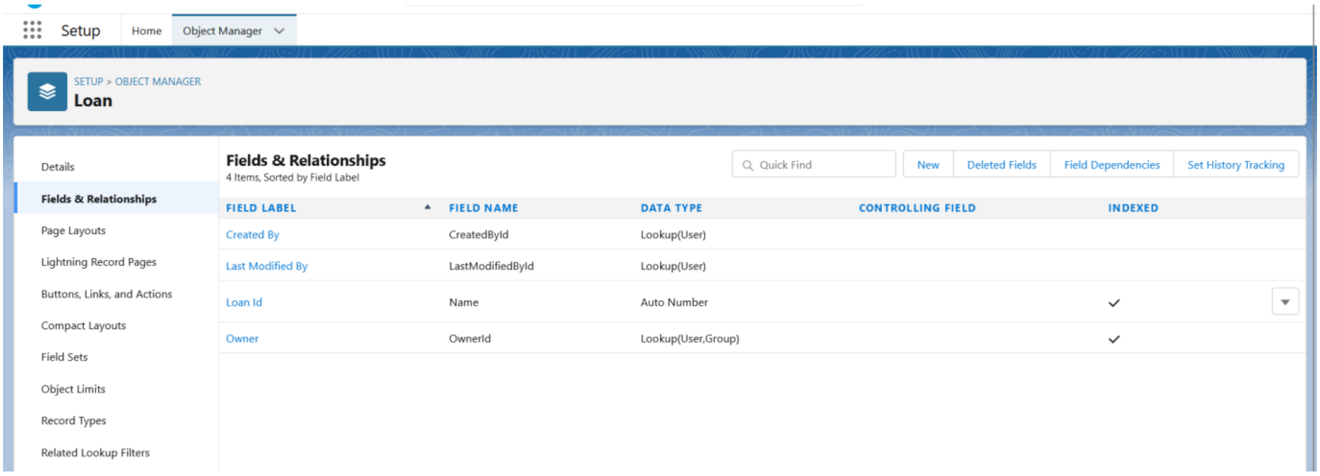
For Loan Object

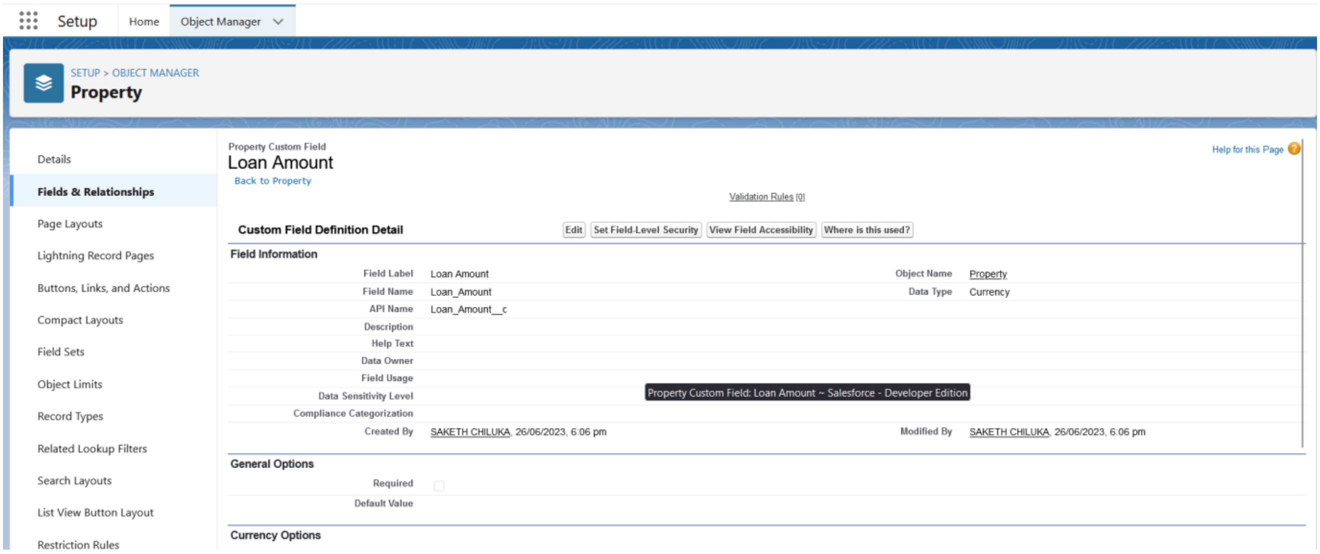
Create the remaining Fields:
Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for
Below Fields

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
(Loan_Repayment__c* (((1+(Interest_Rate__c/52))^ Term__c) -1))/((
Interest_Rate__c/52)*((1+(Interest_R ate__c/52))^ Term__c))







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.

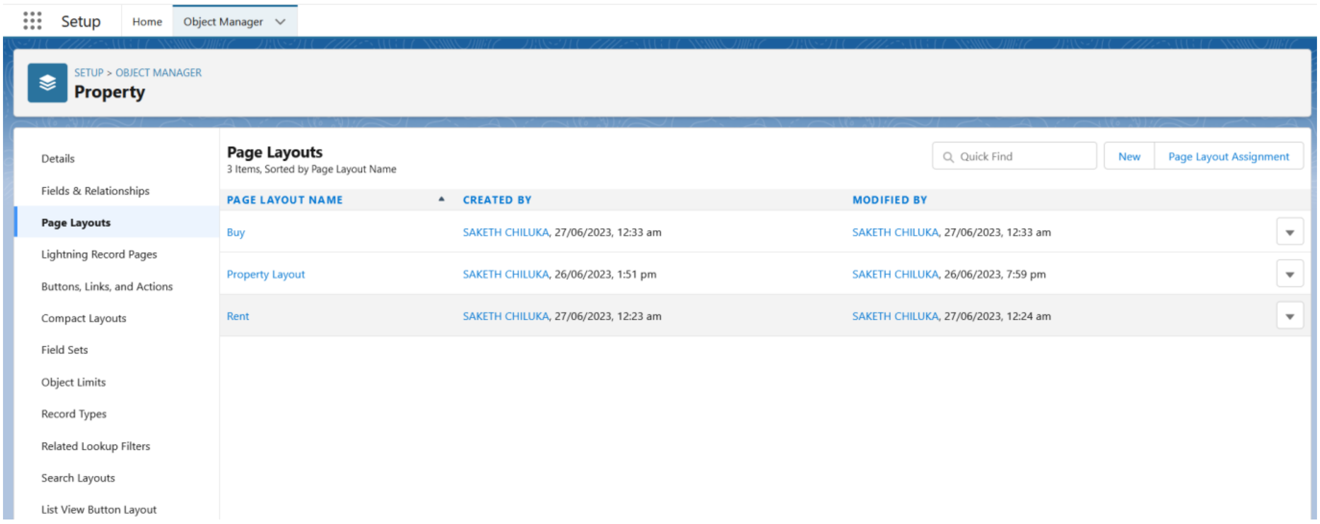
Record types in Salesforce allow you to have different business processes, picklist values, and page layouts to different users based on profile.

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.

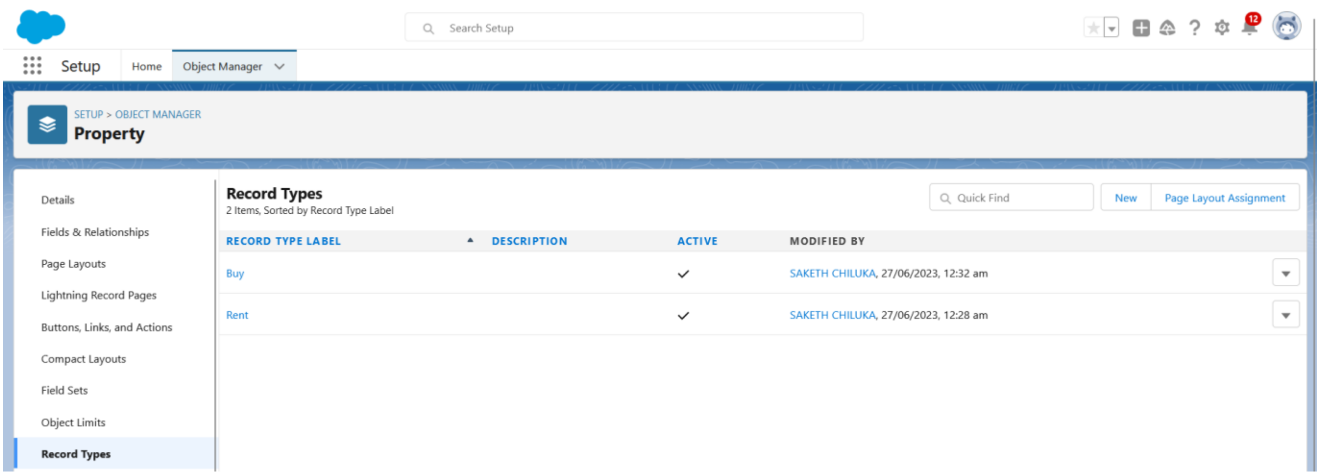
Rent Page Layout

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



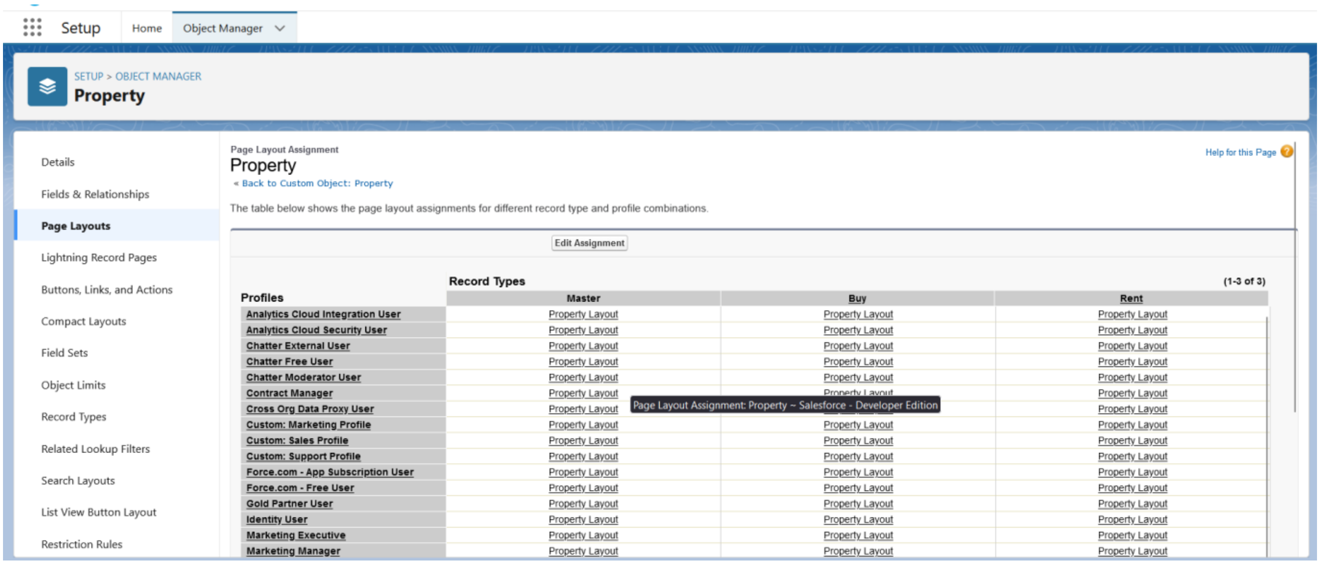
Record type for Property Object

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

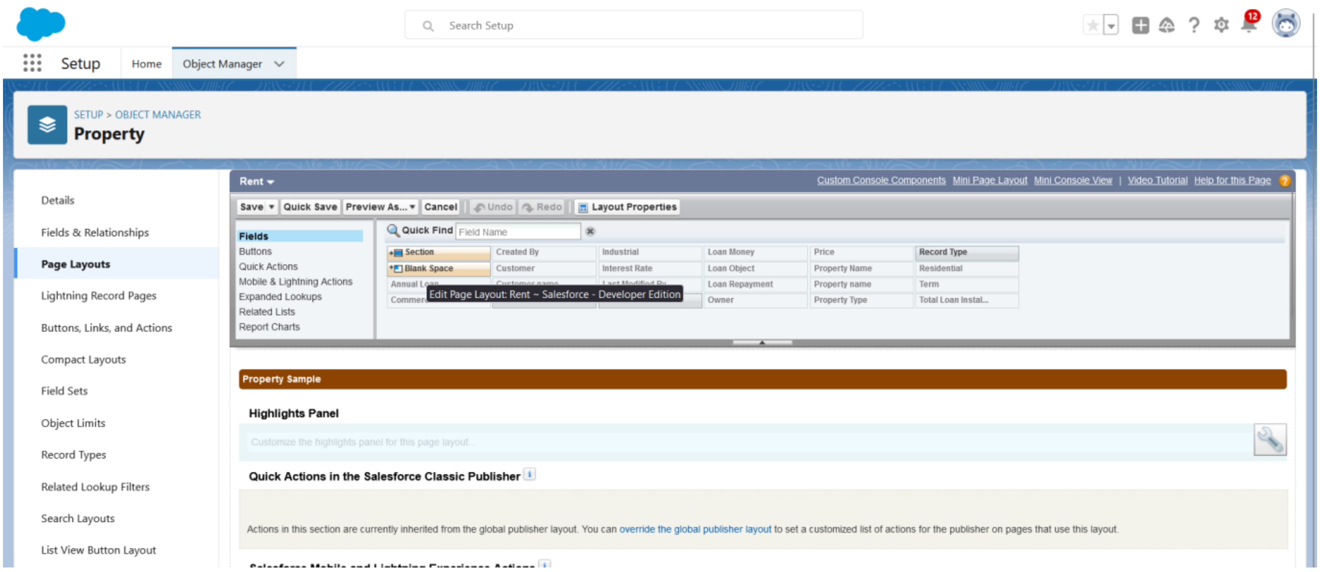


Page Layout Assignment

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.



For Rent:

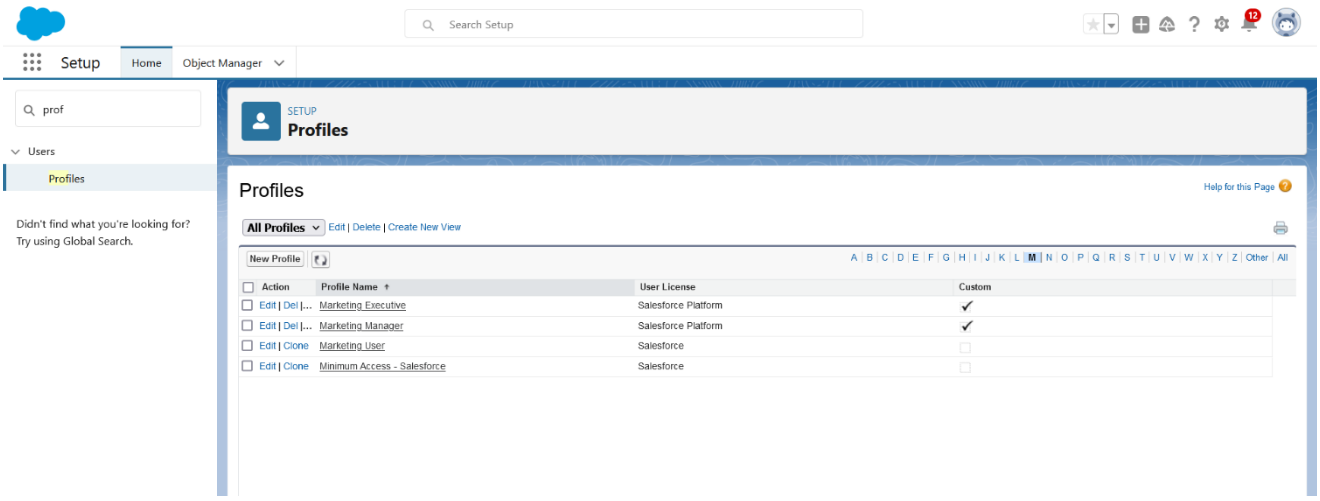


Task-7- Profile

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

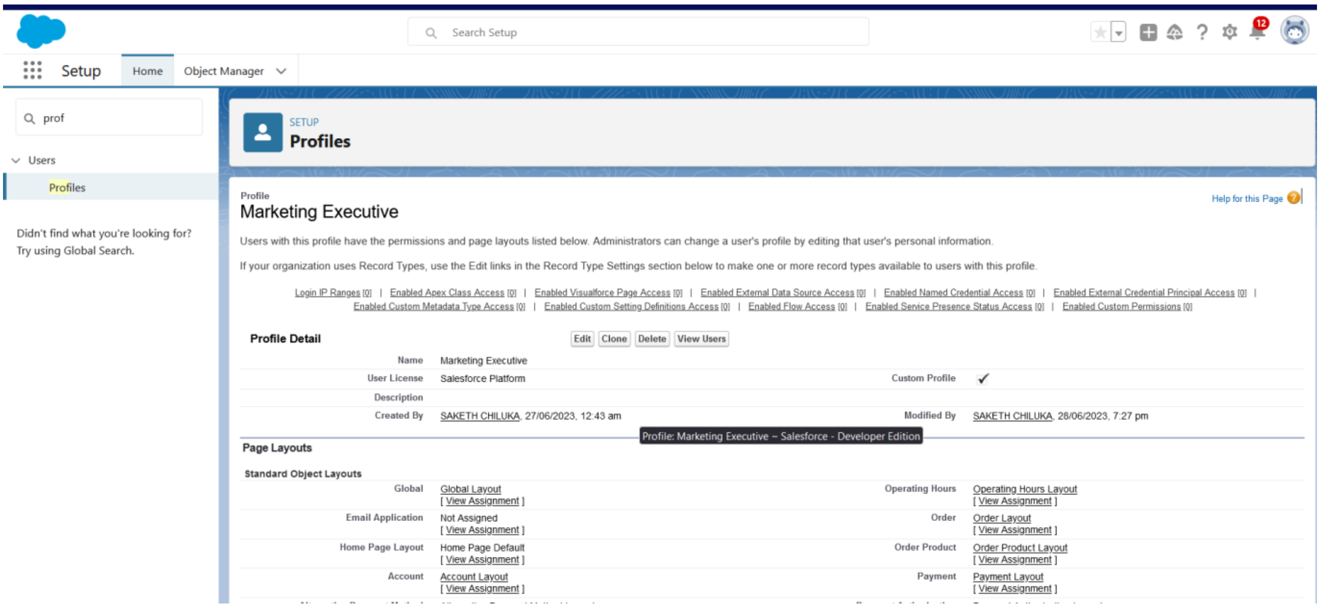
Types of profiles in salesforce
Standard profiles:

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:



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

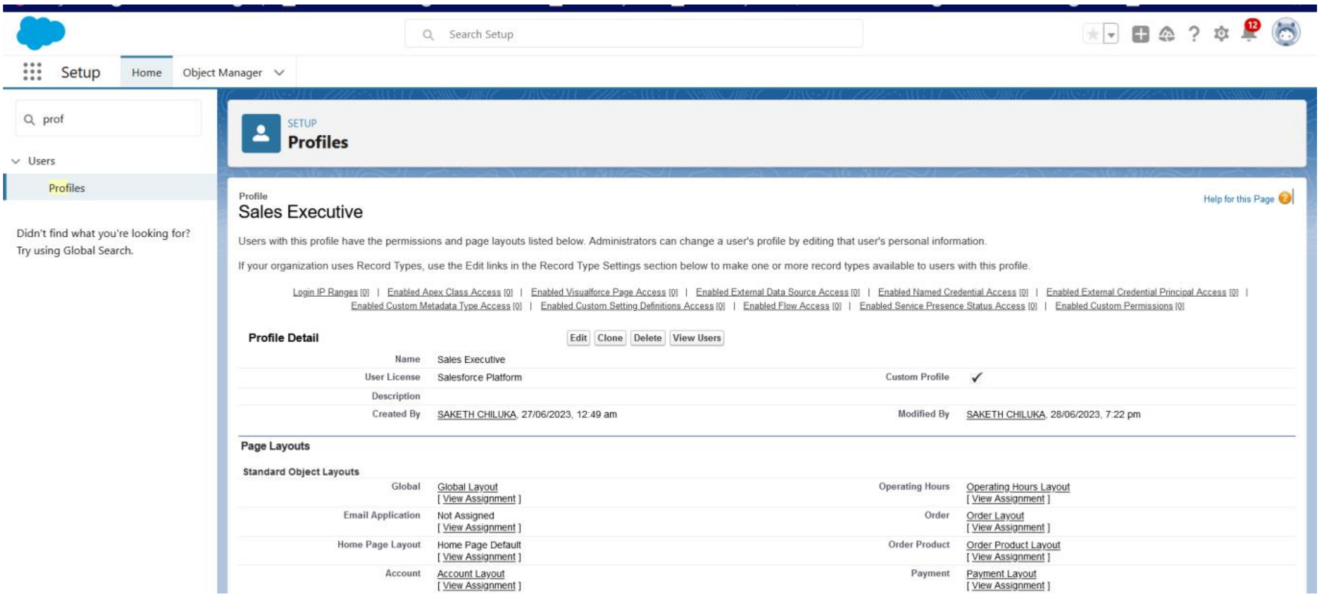


Create Sales Executive Profile

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.

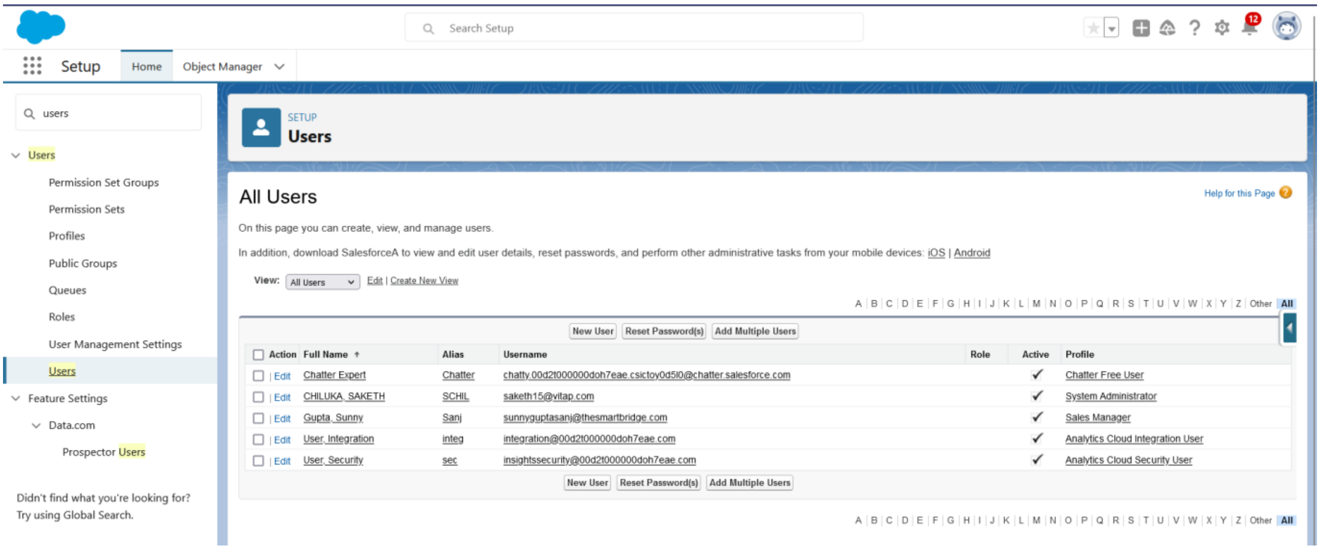


Task-8: User

- 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.

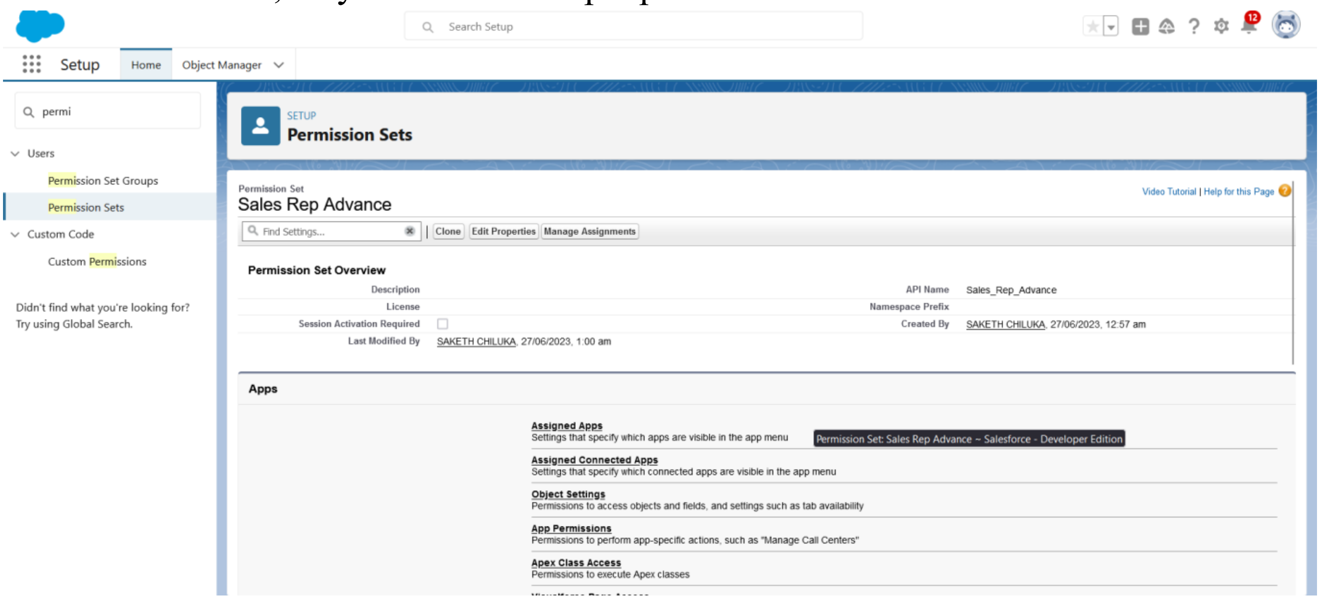
- Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

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.

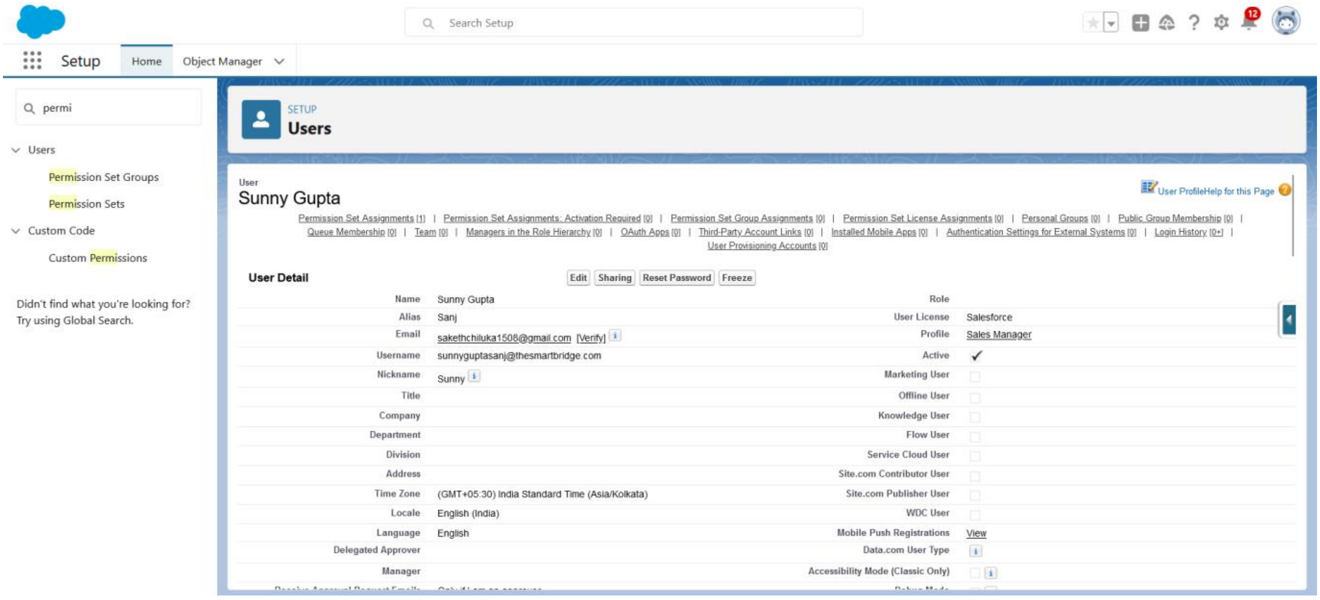


Task-9: Permission Set

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.



Manage Assignment:



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).

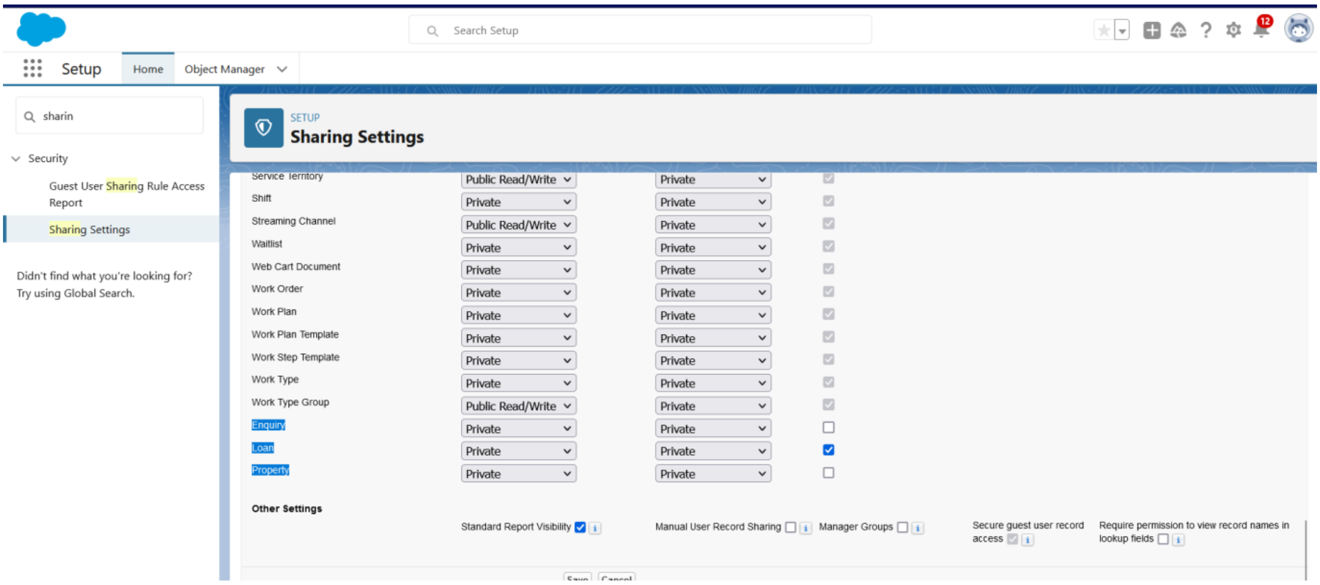
Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

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

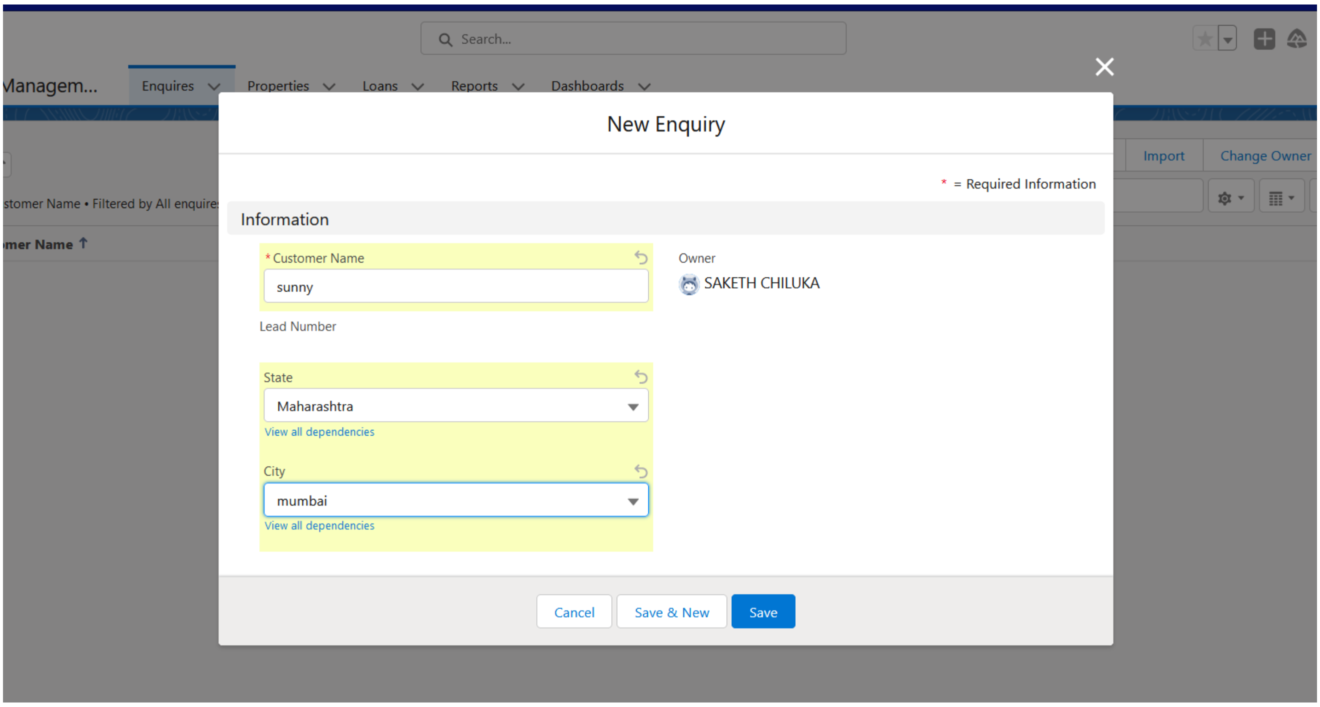
5.Click Edit and from the Drop Down select private for internal and external
6.This Setting is for all the User Which have been Created



Task-11: User Adoption

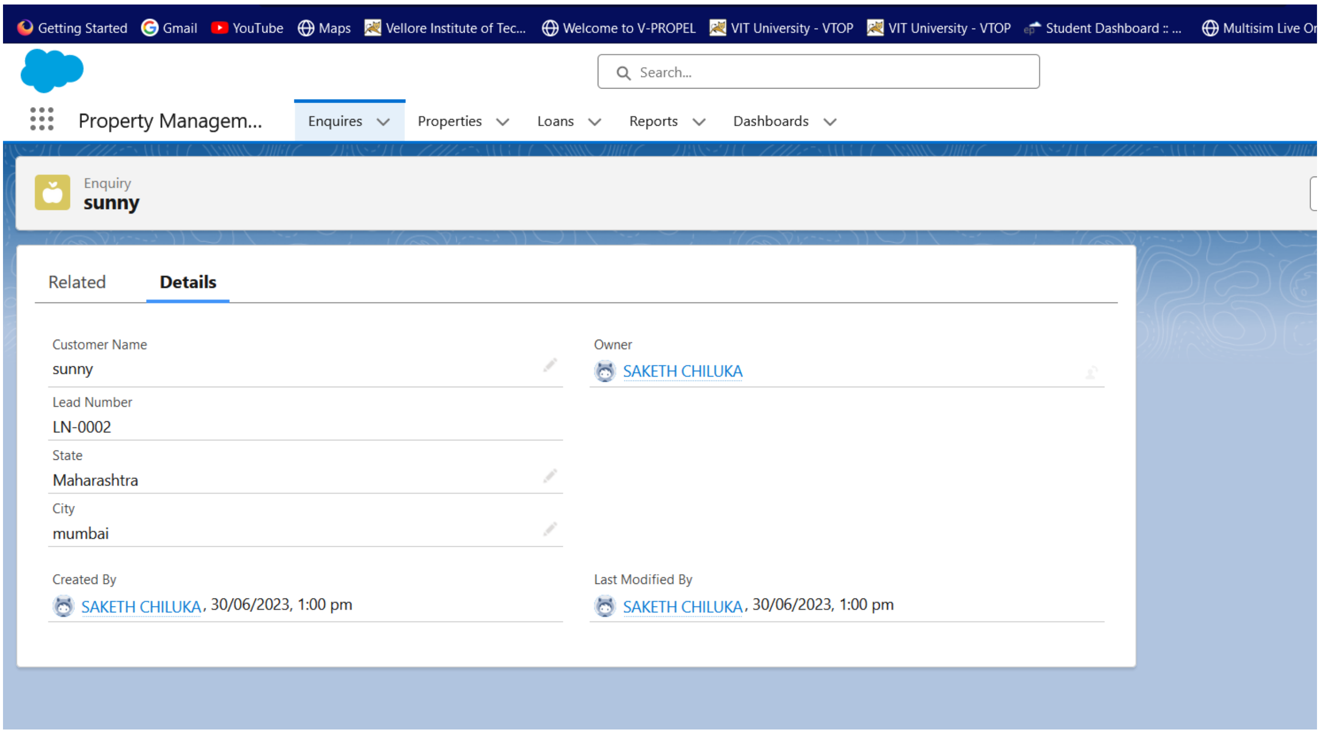
Create a Record(Enquiry)

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



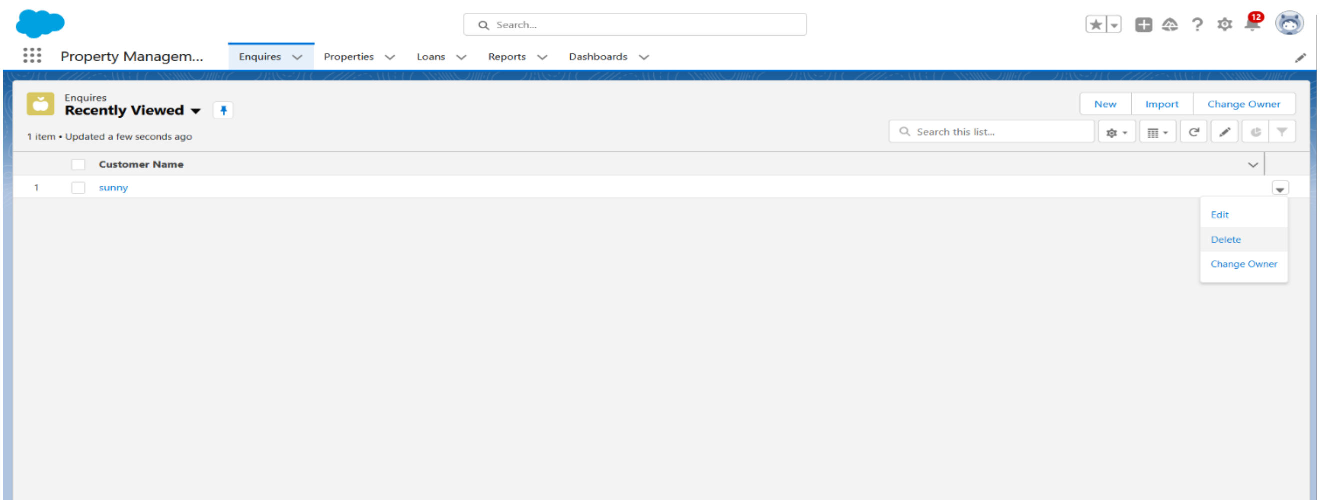
View a Record(Enquiry)

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



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.

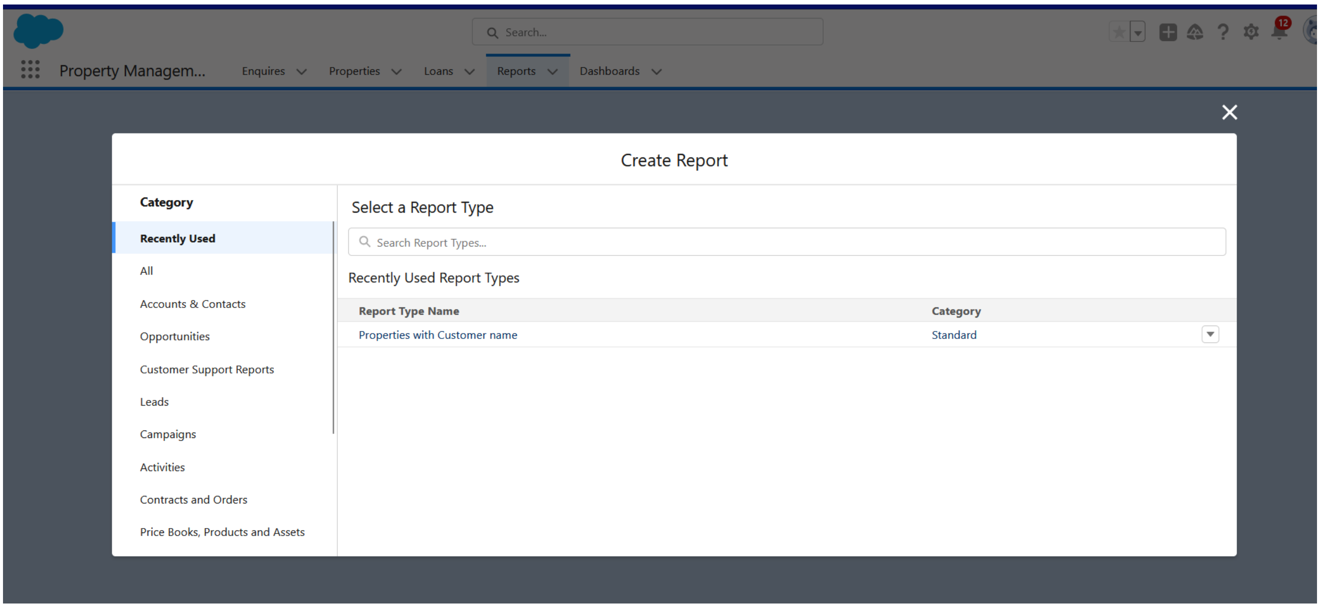


Task-12: Report

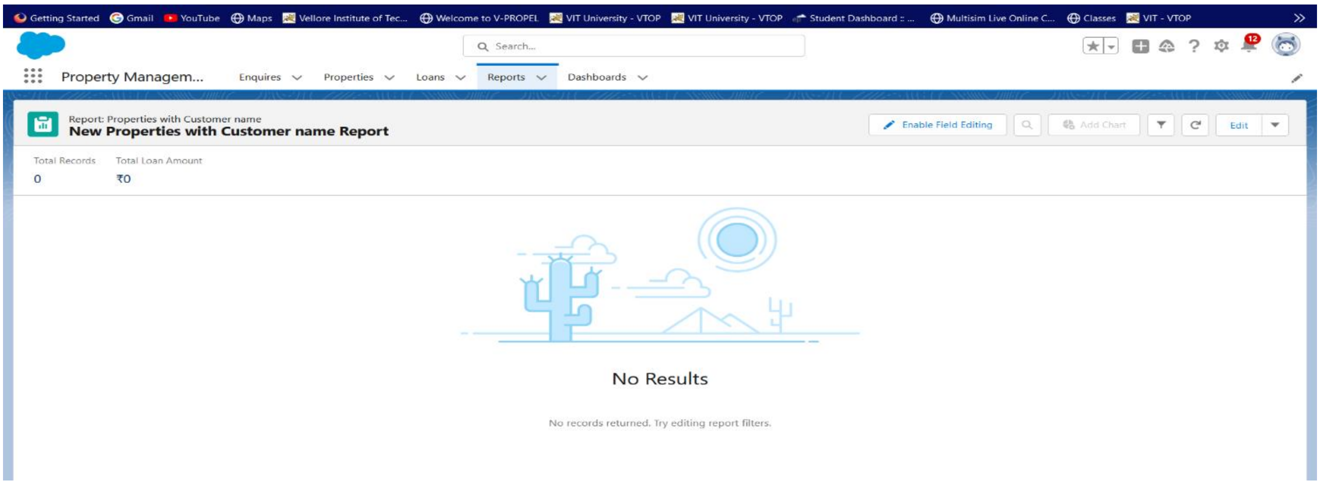
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

- Tabular
- Summary
- Matrix
- Joined Reports



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



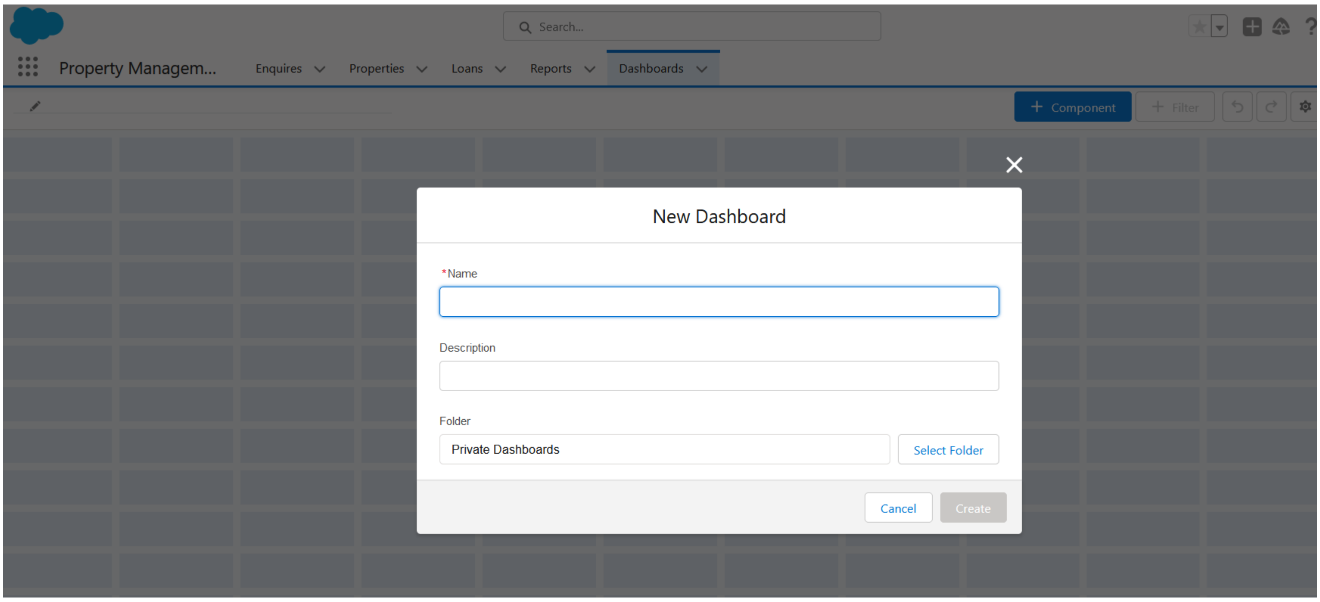
Task-13: Dashboards

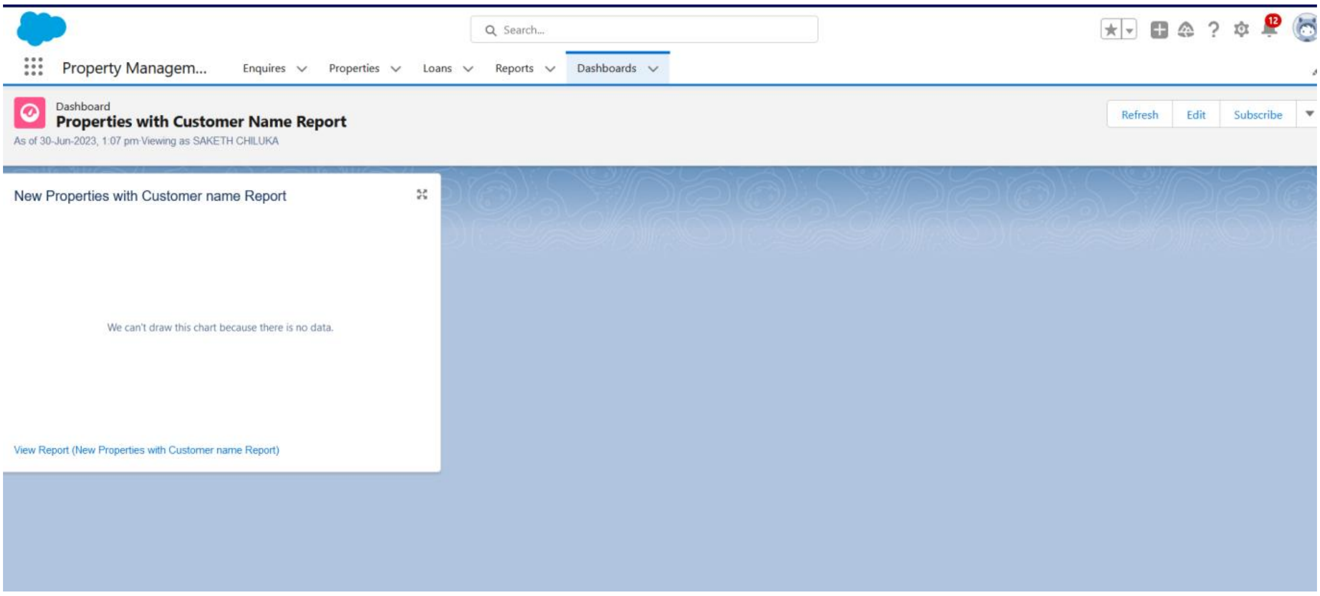
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Create dashboards

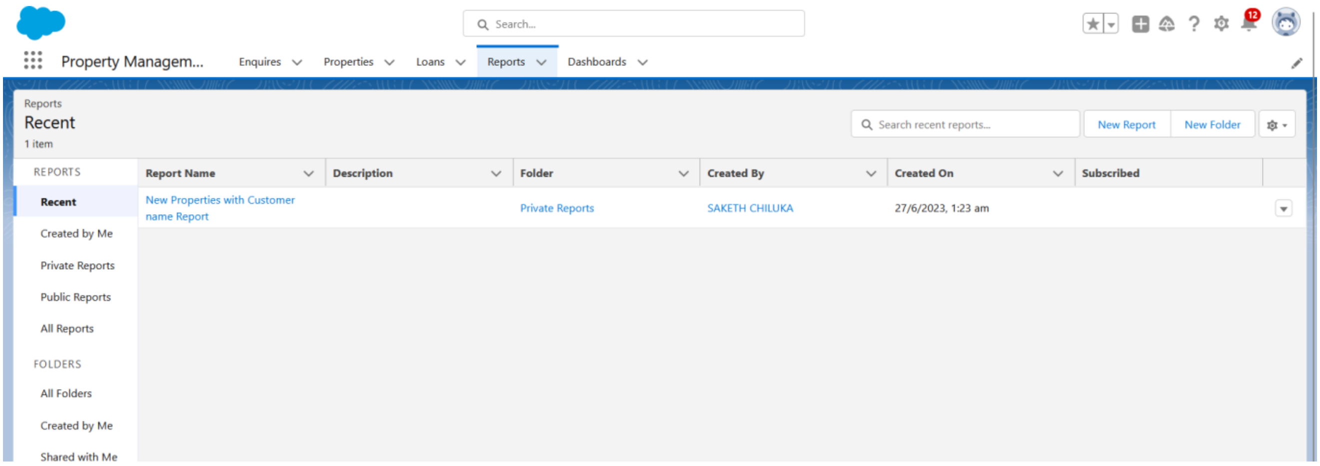
Follow the above steps

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

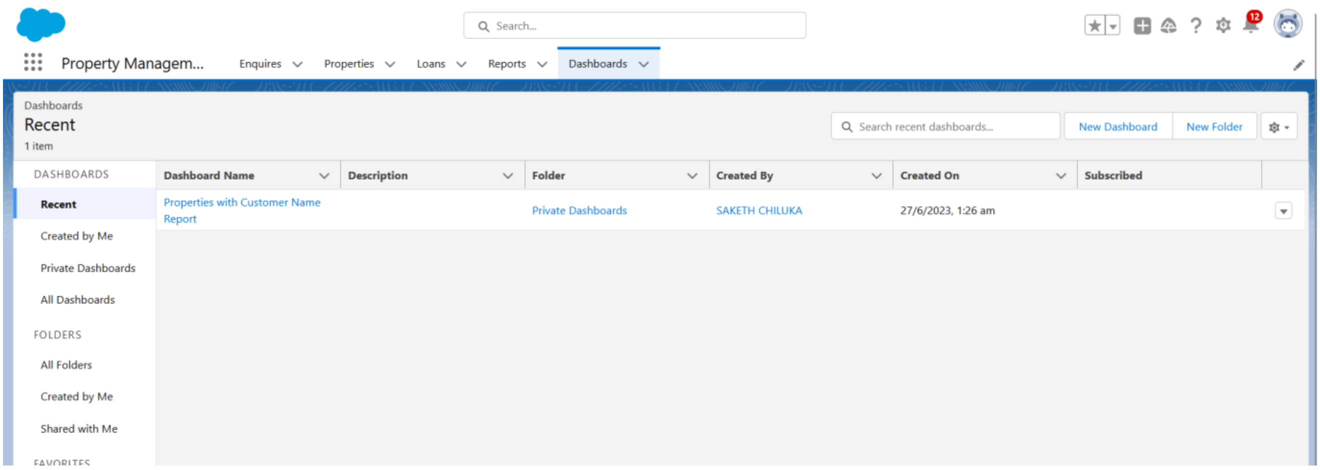




View Report and Dashboard



Dashboard:



*******END*******