



PROJECT TITLE:

Property Management Application using Salesforce

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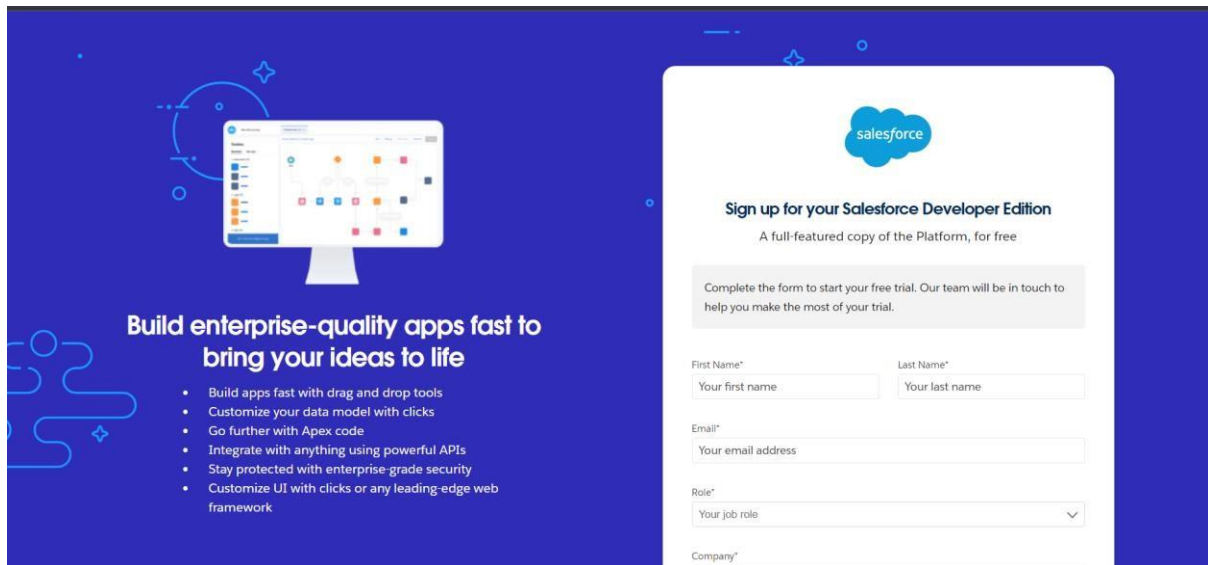
TEAM NUMBER: 200

## 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:

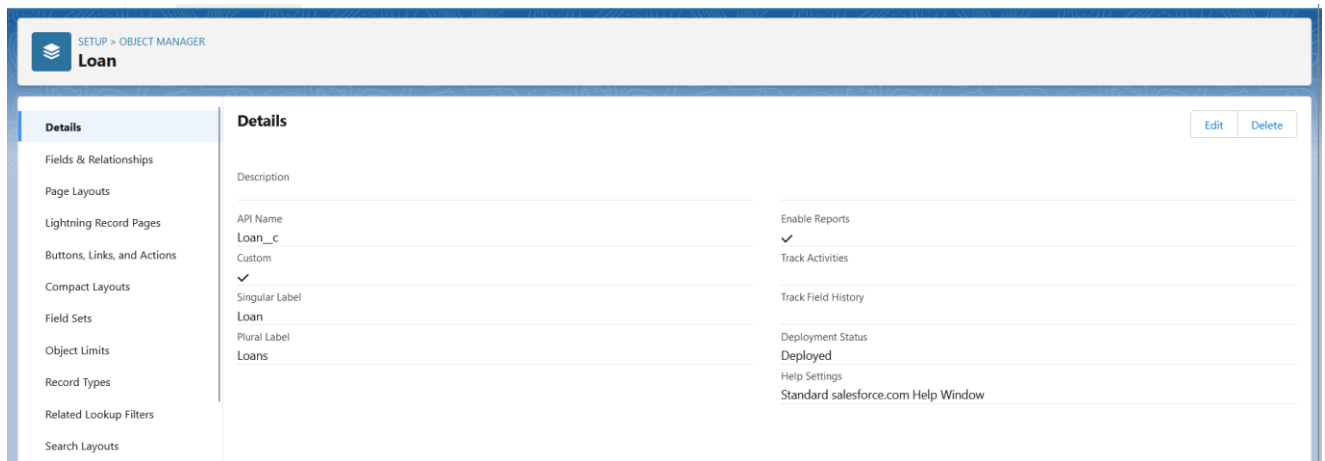
The screenshot shows the Salesforce Setup interface for the 'Enquiry' custom object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Enquiry' and includes a 'Details' section with the following fields: Description, API Name (Enquiry\_c), Custom (checked), Singular Label (Enquiry), Plural Label (Enquires), Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and Edit/Delete buttons.

Same like about steps create Property:

## Property Object:

The screenshot shows the Salesforce Setup interface for the 'Property' custom object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and List View Button Layout. The main content area is titled 'Property' and includes a 'Details' section with the following fields: Description, API Name (Property\_c), Custom (checked), Singular Label (Property), Plural Label (Properties), Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and Edit/Delete buttons.

## 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

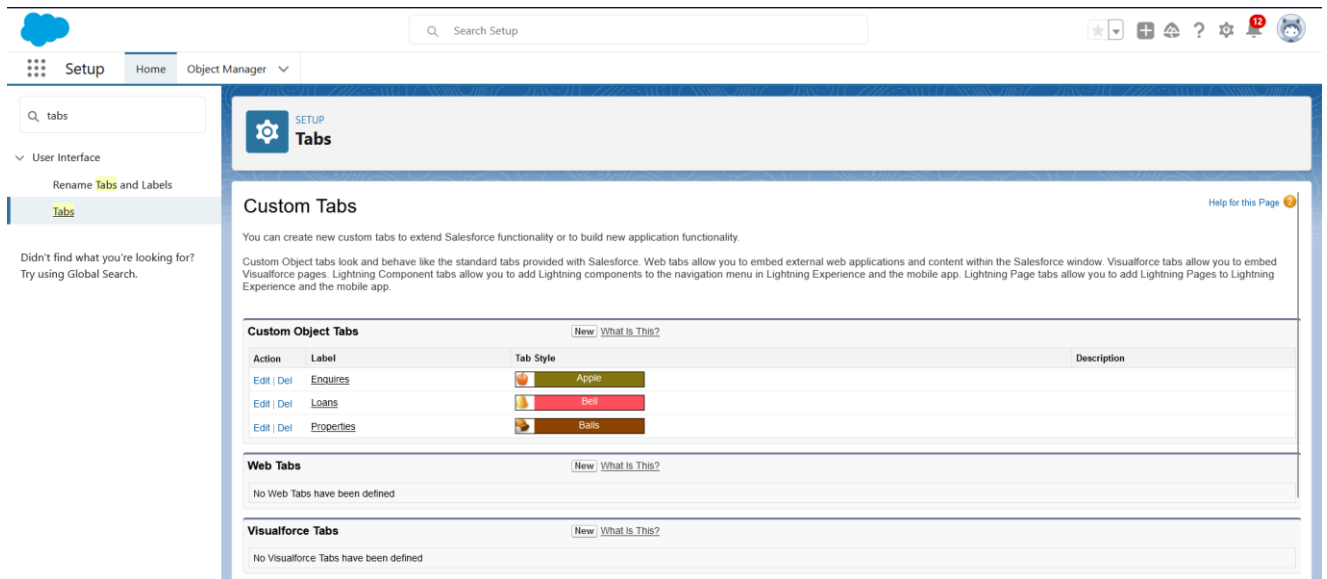
Steps to follow to create Tab are:

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 as default ? 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.

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

Lightning Experience App Manager

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibl...	
10	Marketing	Marketing	Best-in-class on-demand marketing automation	26/06/2023, 1:31 pm	Classic	✓	
11	Platform	Platform	The fundamental Lightning Platform	26/06/2023, 1:31 pm	Classic		
12	Property Management	Property_Management		26/06/2023, 3:38 pm	Lightning	✓	
13	Queue Management	QueueManagement	Create and manage queues for your business.	26/06/2023, 1:31 pm	Lightning	✓	
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	26/06/2023, 1:31 pm	Classic		
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	26/06/2023, 1:31 pm	Lightning	✓	
16	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one ...	26/06/2023, 1:31 pm	Lightning	✓	
17	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	26/06/2023, 1:31 pm	Classic	✓	
18	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	26/06/2023, 1:33 pm	Lightning	✓	
19	Service	Service	Manage customer service with accounts, contacts, cases, and more	26/06/2023, 1:31 pm	Classic	✓	
20	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records ac...	26/06/2023, 1:31 pm	Lightning	✓	
21	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com...	26/06/2023, 1:31 pm	Classic		
22	Subscription Management	BusinessCloudConsole	Get detailed subscription usage metrics across your entire business	26/06/2023, 1:31 pm	Lightning	✓	

Lightning App Builder

App Settings

Pages

Property Management

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

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 ⓘ

Primary Color Hex Value ⓘ

#0070D2

Upload

Org Theme Options

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

App Launcher Preview

PM Property Management

← 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 ⓘ

Setup and Personalization ⓘ

\* Navigation Style

☒ Standard navigation

☐ Console navigation

\* Supported Form Factors

☒ Desktop and phone

☐ Desktop

☐ Phone

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

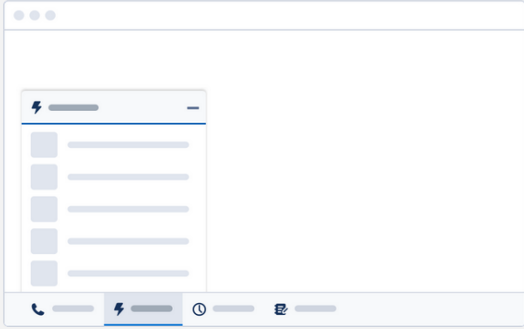
Utility Items (Desktop Only)

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.

Lightning App Builder
App Settings
Pages
Property Management
? Help

App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
**Navigation Items**
User Profiles

### Navigation Items

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.

Available Items

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions

Created

Create

Selected Items

- Enquires
- Properties
- Loans

App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
**User Profiles**

### User Profiles

Choose the user profiles that can access this app.

Available Profiles

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User

Selected Profiles

- Marketing Executive
- Sales Manager
- Marketing Manager
- Sales Executive
- System Administrator
- Standard User
- Standard Platform User

## 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 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.

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Enquiry

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

Edit Field Dependency

Save Cancel Preview

Controlling Field State

Dependent Field City

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

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

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All

## 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

Property

Controlling Field: Property type (Change)

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

Picklist Values Used

Active and inactive picklist values 3 (1,000 max)

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Values

New Reorder Replace Printable View Chart Colors

Delete Selected Deactivate Selected Replace Selected

Action	Values	API Name	Default	Delete Selected	Assigned dynamically	Modified By
<input type="checkbox"/> Edit   Del   Deactivate	1BHK	1BHK	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	SAKETH CHILUKA, 26/06/2023, 5:58 pm
<input type="checkbox"/> Edit   Del   Deactivate	2BHK	2BHK	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	SAKETH CHILUKA, 26/06/2023, 5:58 pm
<input type="checkbox"/> Edit   Del   Deactivate	3BHK	3BHK	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	SAKETH CHILUKA, 26/06/2023, 5:58 pm

Inactive Values

Delete Unused Values

No inactive values defined.

Setup Home Object Manager

Property

Property Field Dependencies

Help for this Page

« Back to Custom Object: Property

This page allows you to define dependencies between fields (e.g., dependent picklists).

Field Dependencies

New

Action	Controlling Field	Dependent Field	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	Property Type	Residential	Property Field Dependencies – Salesforce - Developer Edition, 23, 6:01 pm
<a href="#">Edit</a>   <a href="#">Del</a>	Property Type	Commercial	SAKETH CHILUKA, 26/06/2023, 6:01 pm
<a href="#">Edit</a>   <a href="#">Del</a>	Property Type	Industrial	SAKETH CHILUKA, 26/06/2023, 6:02 pm

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

SetupHomeObject Manager

Property

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction Rules

Controlling FieldProperty TypeDependent FieldResidential

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 ValuesExclude Values

Property Type:Residential

Edit Field Dependency - Salesforce - Developer Edition

Showing Columns: 1 - 3 (of 3) < Previous | Next > | View All | Go to

Residential	1BHK	2BHK	3BHK	Industrial	1BHK	2BHK	3BHK

Showing Columns: 1 - 3 (of 3) < Previous | Next > | View All |

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

Include ValuesExclude Values

SaveCancelPreview

SetupHomeObject Manager

Property

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction Rules

Controlling FieldProperty TypeDependent FieldCommercial

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 ValuesExclude Values

Property Type:Commercial

Edit Field Dependency - Salesforce - Developer Edition

Showing Columns: 1 - 3 (of 3) < Previous | Next > | View All | Go to

Commercial	Shop	Office	Industrial	Shop	Office

Showing Columns: 1 - 3 (of 3) < Previous | Next > | View All |

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

Include ValuesExclude Values

SaveCancelPreview

SetupHomeObject Manager

Property

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction Rules

Controlling FieldProperty TypeDependent FieldIndustrial

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 ValuesExclude Values

Property Type:Industrial

Edit Field Dependency - Salesforce - Developer Edition

Showing Columns: 1 - 3 (of 3) < Previous | Next > | View All | Go to

Industrial	Factory	Mail	Industrial	Factory	Mail

Showing Columns: 1 - 3 (of 3) < Previous | Next > | View All |

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

Include ValuesExclude Values

SaveCancelPreview

## 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

$$\frac{(\text{Loan\_Repayment\_c} * (((1 + (\text{Interest\_Rate\_c} / 52)) ^ \text{Term\_c}) - 1)) / ((\text{Interest\_Rate\_c} / 52) * ((1 + (\text{Interest\_Rate\_c} / 52)) ^ \text{Term\_c}))}{}$$

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Property

Details

Fields & Relationships

22 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields


Field Dependencies

Set History Tracking

Fields & Relationships	Loan Amount	Loan_Amount__c	Currency(18, 0)	
Page Layouts	Loan Money	Loan_Money__c	Formula (Text)	
Lightning Record Pages	Loan Object	Loan_Object__c	Formula (Currency)	
Buttons, Links, and Actions	Loan Repayment	Loan_Repayment__c	Number(18, 0)	
Compact Layouts	Owner	OwnerId	Lookup(User,Group)	✓
Field Sets	Price	Price__c	Number(18, 0)	
Object Limits	Property name	Property_name__c	Lookup(Property)	✓
Record Types	Property Name	Name	Text(80)	✓
Related Lookup Filters				
Search Layouts				
List View Button Layout				

Setup | 
 Home | 
 Object Manager ▾

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[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

[Help for this Page ?](#)

### Property Custom Field Loan Amount

[Back to Property](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?

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	Property Custom Field: Loan Amount – Salesforce – Developer Edition
Compliance Categorization	
Created By	<a href="#">SAKETH CHILUKA</a> , 26/06/2023, 6:06 pm
Modified By	<a href="#">SAKETH CHILUKA</a> , 26/06/2023, 6:06 pm

**General Options**

Required ☐

Default Value

**Currency Options**

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.

### 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 Setup interface for the 'Property' object. The 'Page Layouts' section is active, displaying a table with 3 items. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The items listed are 'Buy', 'Property Layout', and 'Rent'. The 'Rent' layout was created on 27/06/2023 at 12:23 am by SAKETH CHILUKA.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Buy	SAKETH CHILUKA, 27/06/2023, 12:33 am	SAKETH CHILUKA, 27/06/2023, 12:33 am
Property Layout	SAKETH CHILUKA, 26/06/2023, 1:51 pm	SAKETH CHILUKA, 26/06/2023, 7:59 pm
Rent	SAKETH CHILUKA, 27/06/2023, 12:23 am	SAKETH CHILUKA, 27/06/2023, 12:24 am

## 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 Setup interface for the 'Property' object. The 'Record Types' section is active, displaying a table with 2 items. The table has columns for 'RECORD TYPE LABEL', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'. The items listed are 'Buy' and 'Rent'. The 'Buy' record type is active and was created on 27/06/2023 at 12:32 am by SAKETH CHILUKA.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Buy		✓	SAKETH CHILUKA, 27/06/2023, 12:32 am
Rent		✓	SAKETH CHILUKA, 27/06/2023, 12:28 am



## 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 'Page Layout Assignment' page for the 'Property' object in Salesforce. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area shows a table of assignments for different record types and profiles. The table has columns for Profiles, Record Types (Master, Buy, Rent), and a '1-3 of 3' indicator. The 'Buy' record type is highlighted, and the 'Property Layout' is assigned to it. A tooltip 'Page Layout Assignment: Property - Salesforce - Developer Edition' is visible over the 'Buy' column.

Profiles	Master	Buy	Rent
Analytics Cloud Integration User	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 'Page Layout Editor' for the 'Rent' record type in Salesforce. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area shows a table of fields and their properties. The table has columns for Section, Field Name, Created By, Industrial, Loan Money, Price, and Record Type. The 'Rent' record type is highlighted, and the 'Property Layout' is assigned to it. A tooltip 'Edit Page Layout: Rent - Salesforce - Developer Edition' is visible over the 'Rent' column.

Section	Field Name	Created By	Industrial	Loan Money	Price	Record Type
Blank Space	Customer	Customer	Interest Rate	Loan Object	Property Name	Residential
Annual Loan	Customer	Customer	Loan Repayment	Property name	Term	
Comment	Owner	Owner	Property Type	Total Loan Instal...		

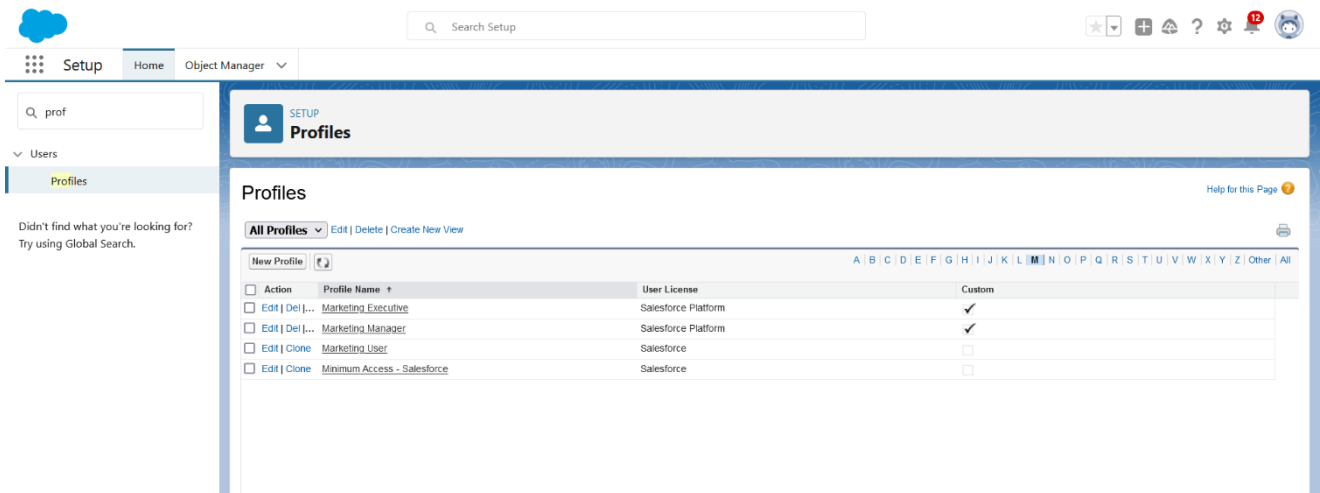
## Task-7- Profile

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

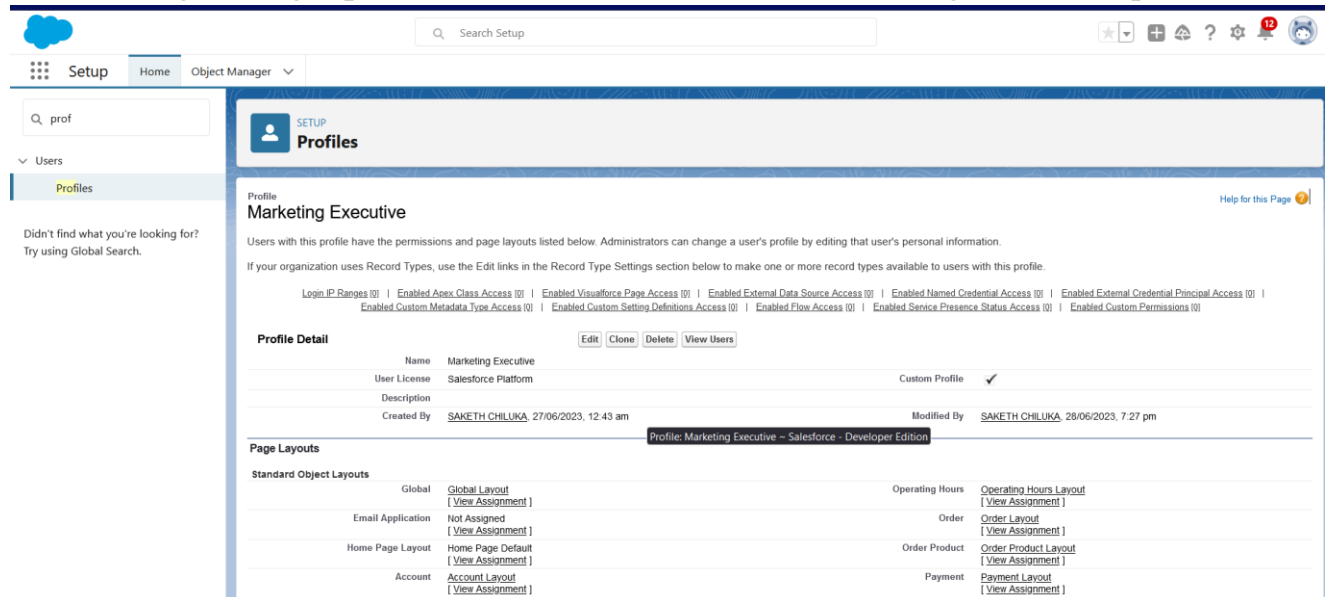
### Standard profiles:

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

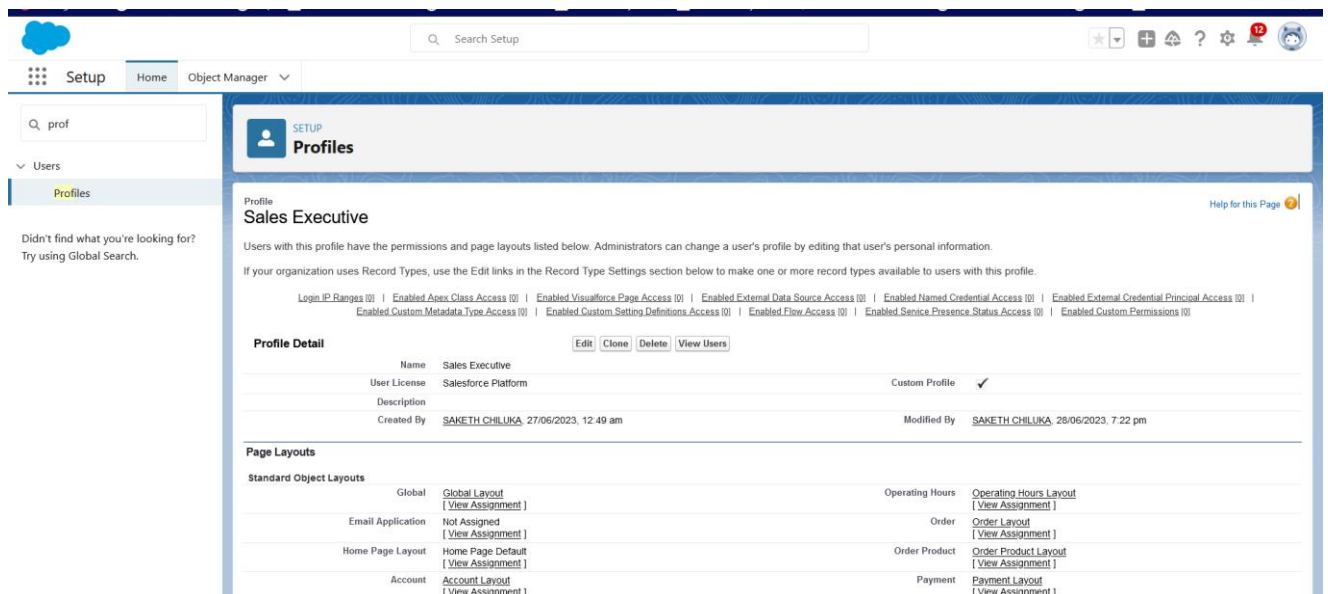


## Create Sales Executive Profile

### 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.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'prof' and a 'Profiles' link. The main content area is titled 'Sales Executive' and includes a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.' Below this is a list of enabled permissions: Login IP Ranges, Enabled Apex Class Access, Enabled Visualforce Page Access, Enabled External Data Source Access, Enabled Named Credential Access, Enabled External Credential Principal Access, Enabled Custom Metadata Type Access, Enabled Custom Setting Definitions Access, Enabled Flow Access, Enabled Service Presence Status Access, and Enabled Custom Permissions. The 'Profile Detail' section shows the Name as 'Sales Executive', User License as 'Salesforce Platform', and Custom Profile as checked. It also shows the Created By as 'SAKETH CHILUKA' on 27/06/2023 at 12:49 am and Modified By as 'SAKETH CHILUKA' on 28/06/2023 at 7:22 pm. The 'Page Layouts' section lists Standard Object Layouts: Global (Global Layout), Email Application (Not Assigned), Home Page Layout (Home Page Default), and Account (Account Layout). It also lists Operating Hours (Operating Hours Layout), Order (Order Layout), Order Product (Order Product Layout), and Payment (Payment Layout).

### 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.

**Setup** Home Object Manager

Search Setup

users

**Users**

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings

**Users**

Feature Settings  
Data.com  
Prospector Users

Didn't find what you're looking for?  
Try using Global Search.

**SETUP Users**

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](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2000000doh7eae.csictov0d5d0@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	CHILUKA_SAKETH	SCHIL	saketh15@vitalp.com		✓	System Administrator
<input type="checkbox"/> Edit	Gupta_Sunny	Sani	sunnyguptasani@thesmartbridge.com		✓	Sales Manager
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d2000000doh7eae.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d2000000doh7eae.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

## 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.

**Setup** Home Object Manager

Search Setup

permi

**Permission Sets**

Permission Set Groups  
Permission Sets  
Custom Code  
Custom Permissions

Didn't find what you're looking for?  
Try using Global Search.

**SETUP Permission Sets**

Permission Set Sales Rep Advance

Find Settings... Clone Edit Properties Manage Assignments

**Permission Set Overview**

Description	License	API Name	Namespace Prefix	Session Activation Required	Created By	Last Modified By
		Sales_Rep_Advance		<input type="checkbox"/>	SAKETH CHILUKA	27/06/2023, 1:00 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. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled 'Users' and displays the profile for 'Sunny Gupta'. The profile includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, and Manager. The 'Role' field is set to 'Salesforce', and the 'Profile' is 'Sales Manager'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Mobile Push Registrations' checkbox is unchecked. The 'Data.com User Type' checkbox is unchecked. The 'Accessibility Mode (Classic Only)' checkbox is unchecked. The 'User Profile' link is visible in the top right corner.

## 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).

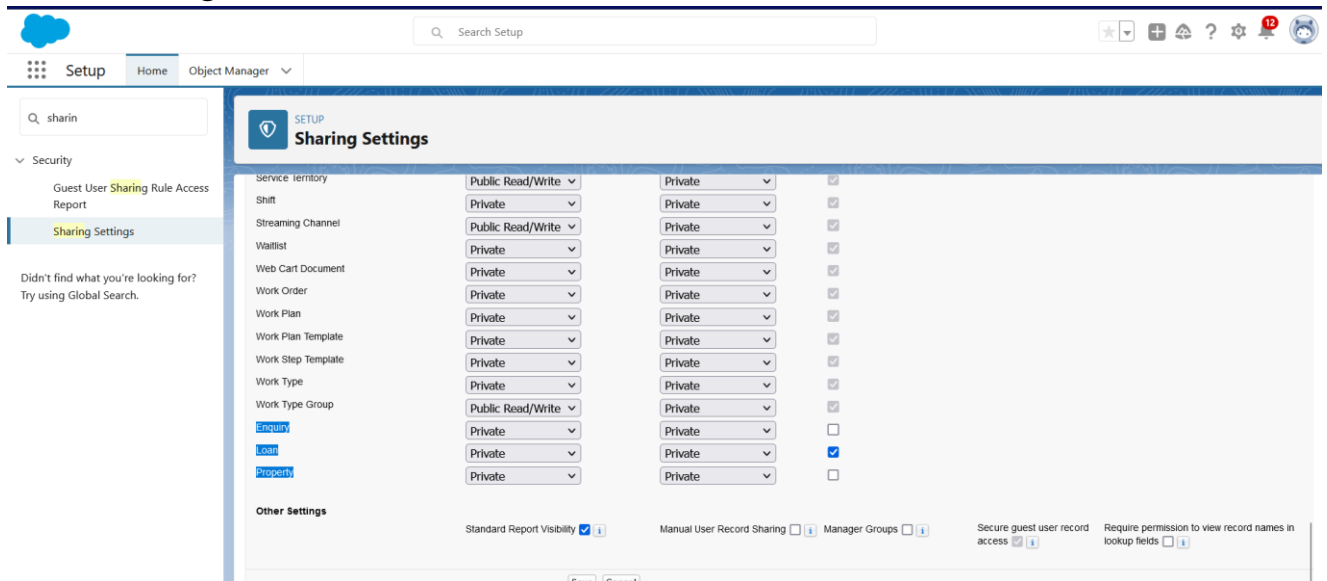
Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

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

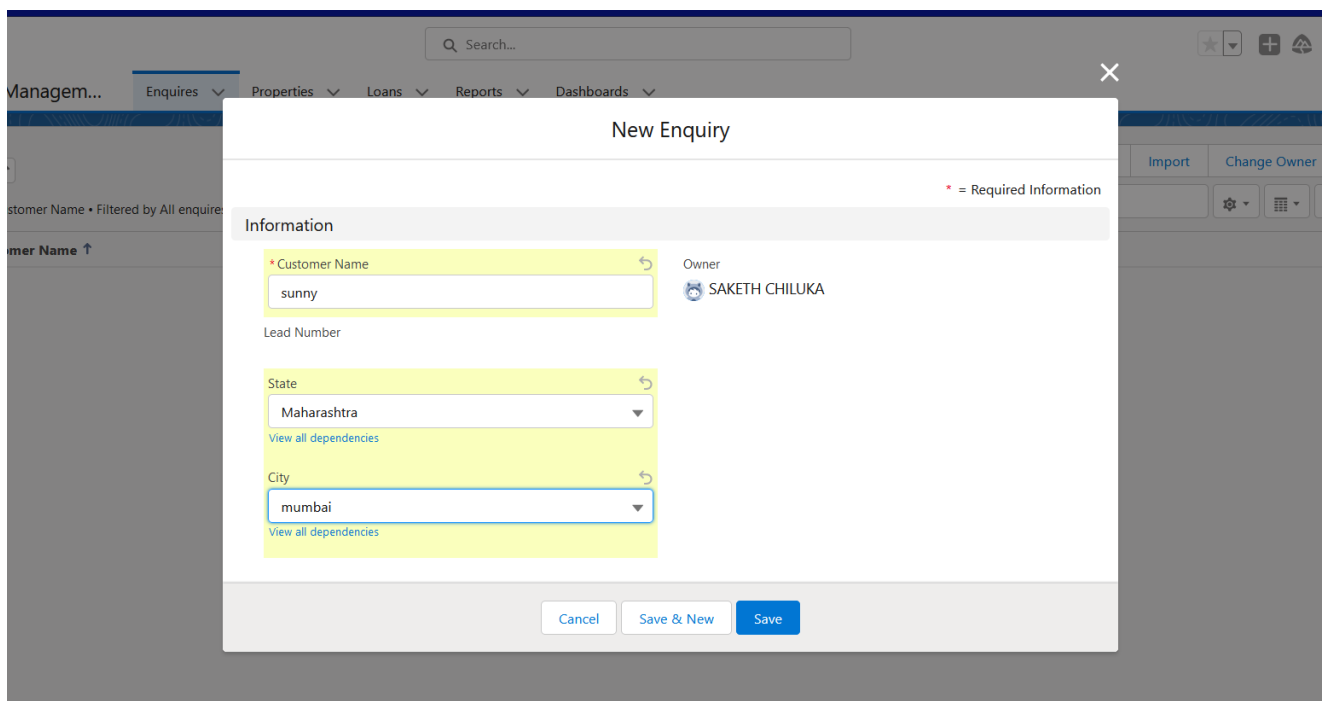
5. Click Edit and from the Drop Down select private for internal and external
6. This Setting is for all the User Which have been Created



## 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

The screenshot shows the 'Enquiry' details page for a customer named 'sunny'. The page is titled 'Enquiry sunny' and has a 'Details' tab selected. The details are as follows:

Related	Details
Customer Name	sunny
Lead Number	LN-0002
State	Maharashtra
City	mumbai
Created By	SAKETH CHILUKA, 30/06/2023, 1:00 pm
Owner	SAKETH CHILUKA
Last Modified By	SAKETH CHILUKA, 30/06/2023, 1:00 pm

## 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 the 'Enquiries' list page. The page is titled 'Enquiries Recently Viewed' and has a 'Details' tab selected. The list contains one item:

Customer Name
sunny

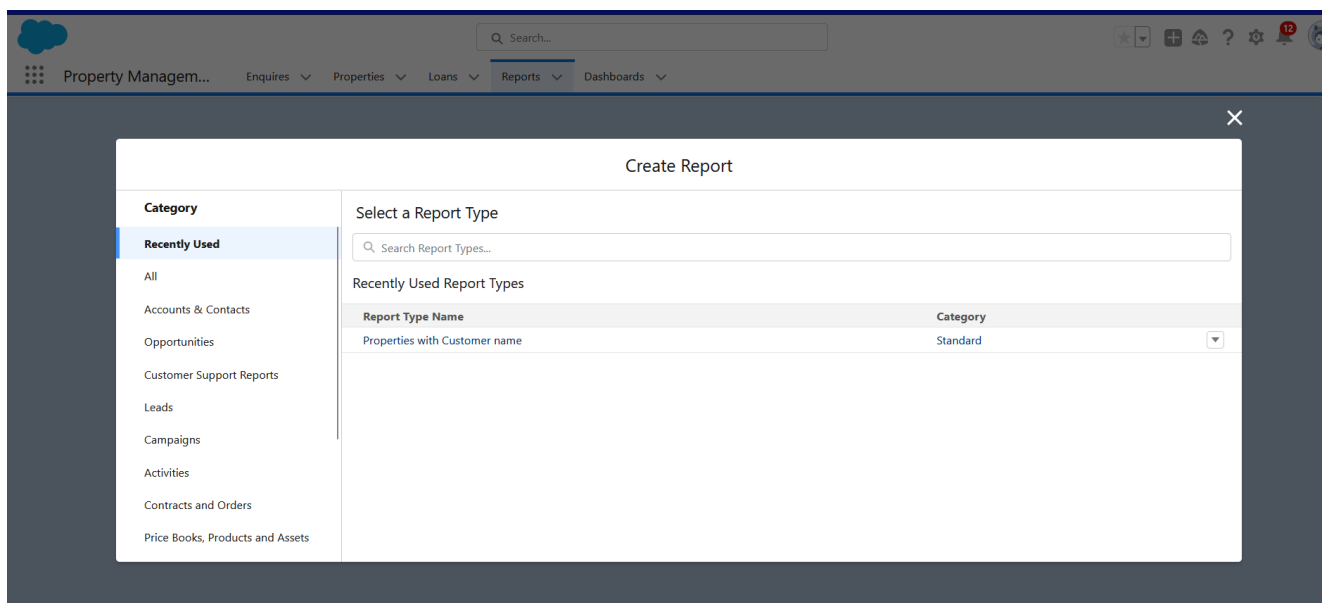
On the right side of the list, there is a dropdown menu with the following options: Edit, Delete, and Change Owner.

## Task-12: Report

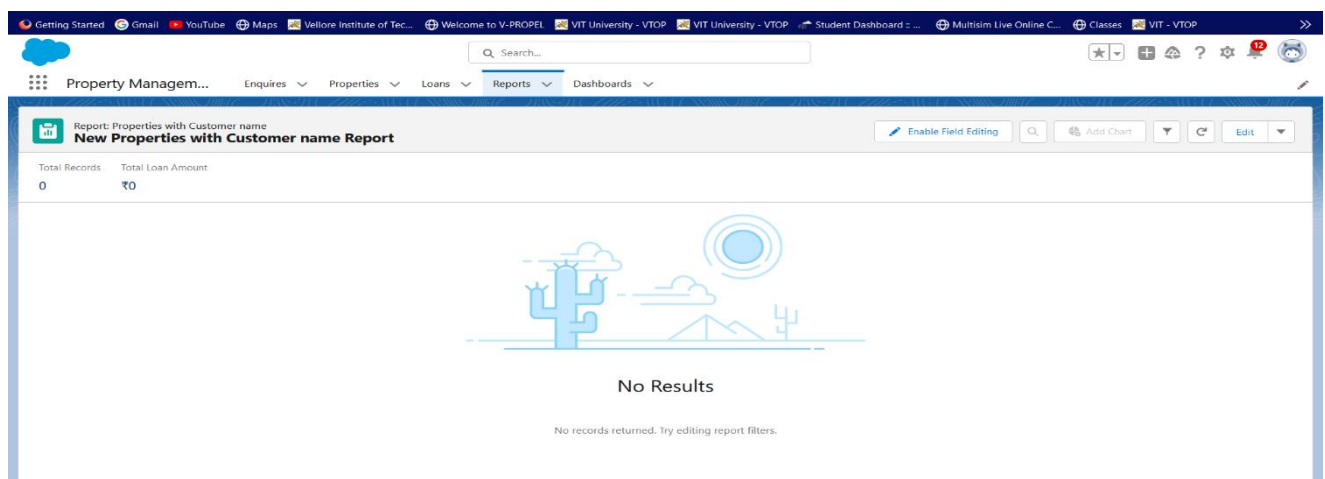
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

### Types of Reports in Salesforce

- Tabular
- Summary
- Matrix
- Joined Reports



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





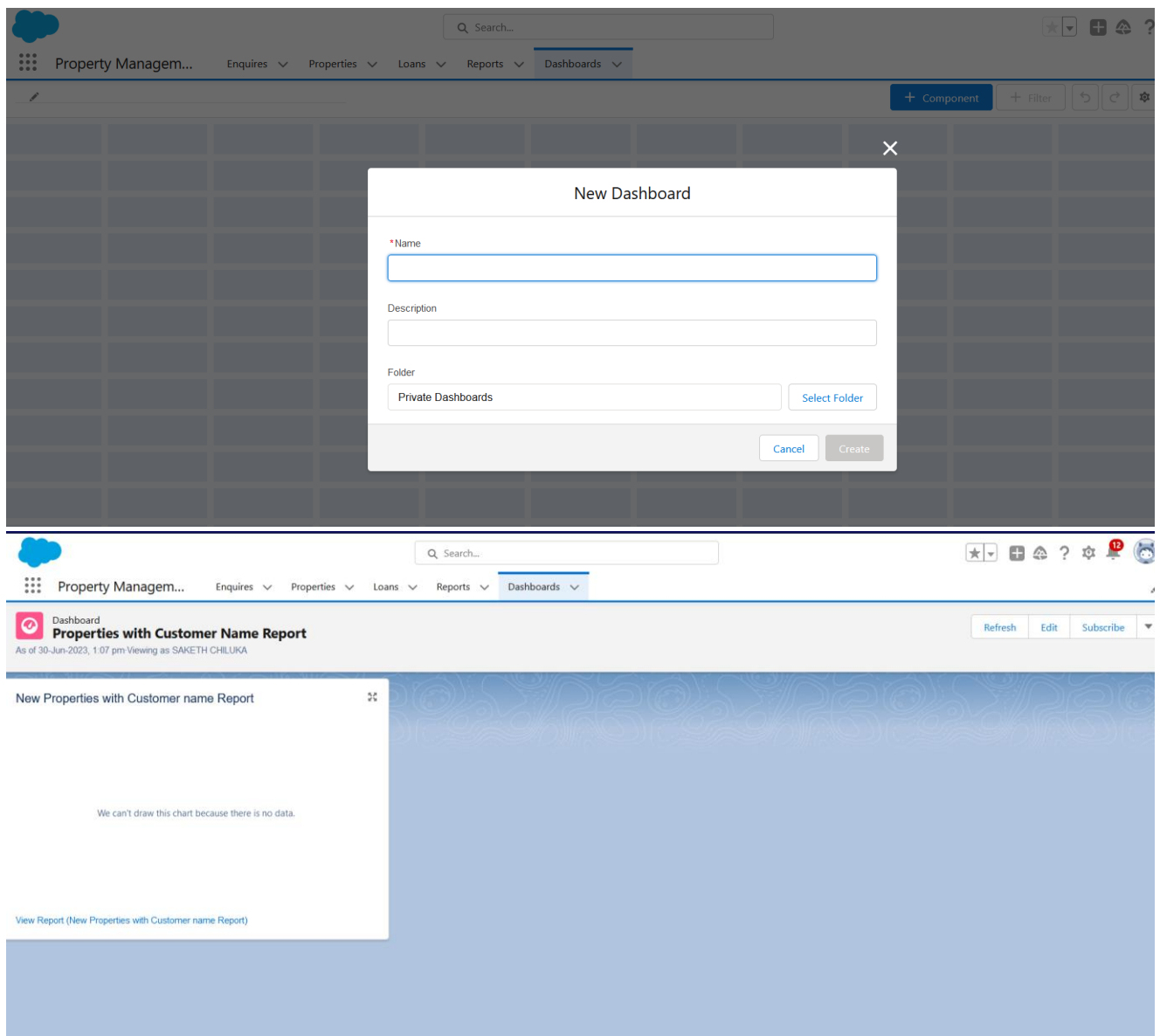
## Task-13: Dashboards

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



## View Report and Dashboard

The screenshot shows the 'View Report' interface. At the top, there's a search bar and navigation tabs for 'Enquires', 'Properties', 'Loans', 'Reports', and 'Dashboards'. The 'Reports' tab is active. Below the navigation bar, there's a 'Recent' section with a search bar and buttons for 'New Report' and 'New Folder'. A table lists recent reports. The first report is 'New Properties with Customer name Report' by SAKETH CHILUKA, created on 27/6/2023 at 1:23 am. The left sidebar shows a tree view with 'REPORTS' and 'FOLDERS' sections.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Properties with Customer name Report		Private Reports	SAKETH CHILUKA	27/6/2023, 1:23 am	

## Dashboard:

The screenshot shows the 'View Dashboard' interface. At the top, there's a search bar and navigation tabs for 'Enquires', 'Properties', 'Loans', 'Reports', and 'Dashboards'. The 'Dashboards' tab is active. Below the navigation bar, there's a 'Recent' section with a search bar and buttons for 'New Dashboard' and 'New Folder'. A table lists recent dashboards. The first dashboard is 'Properties with Customer Name Report' by SAKETH CHILUKA, created on 27/6/2023 at 1:26 am. The left sidebar shows a tree view with 'DASHBOARDS' and 'FOLDERS' sections.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Properties with Customer Name Report		Private Dashboards	SAKETH CHILUKA	27/6/2023, 1:26 am	

\*\*\*\*\*END\*\*\*\*\*

