

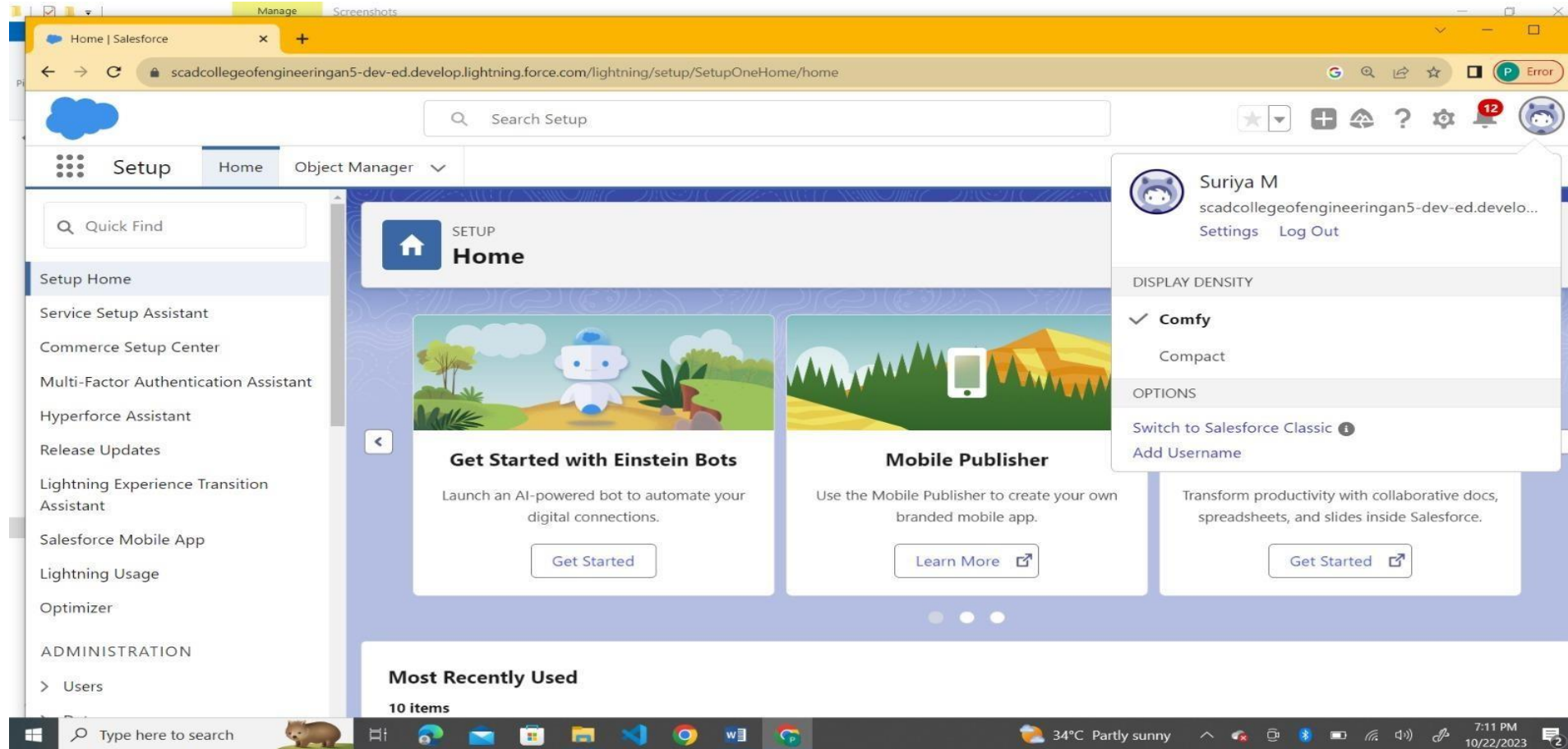
# NAAN MUDHALVAN

## SALESFORCE PROJECT REPORT

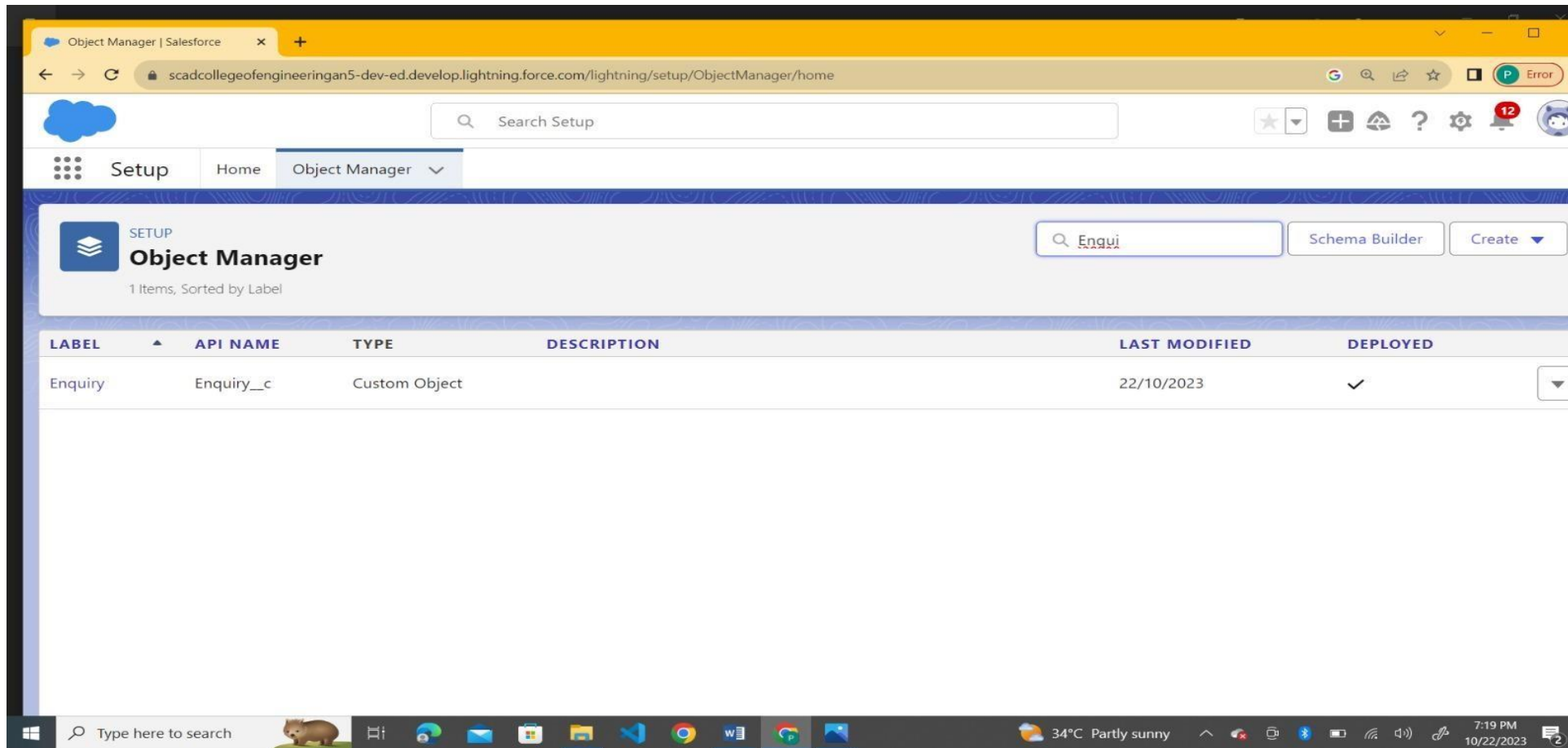
COLLEGE : SCAD ENGINEERING COLLEGE, CHERANMAHADEVI  
BATCH-8

NAME	NM ID	REG NO
MAHARAJA M	F3A114CBC8BC3BE8D704947D39300818	952820114543
MUGESHWARAN E	8A8E95EAD643011AB4348393A55B06D5	952820114551
PRAKASH M	9C54DBFF8D8599389094A4BEBBD39748	952820114559
SURIYA M	0D398A9BDE4377999BF40D09926A64F7	952820114567
VIKRAM M	3E134DF53FD58DCB34D44592A7075E25	952820114575

# Step 1: Create Salesforce Account



## Step 2: Create the Objects (Enquiries, Properties, Loans)



The screenshot displays the Salesforce Object Manager interface. The browser address bar shows the URL: `scadcollegeofengineeringan5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes a search bar labeled "Search Setup" and navigation tabs for "Setup", "Home", and "Object Manager". Below the header, the "Object Manager" section is titled "SETUP Object Manager" with a subtitle "1 Items, Sorted by Label". A search bar contains the text "Enqui". To the right of the search bar are buttons for "Schema Builder" and "Create". Below this is a table with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Enquiry	Enquiry__c	Custom Object		22/10/2023	✓

The Windows taskbar at the bottom shows the system clock as 7:19 PM on 10/22/2023, with a weather forecast of 34°C Partly sunny.

Object Manager | Salesforce

scadcollegeofengineeringan5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Star

+

Alert

?

Settings

12

Avatar

Setup

Home

Object Manager

SETUP

Object Manager

1 Items, Sorted by Label

property

Schema Builder

Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Property	Property__c	Custom Object		22/10/2023	✓	

Type here to search

Taskbar icons: File Explorer, Edge, Mail, Calendar, Store, VS Code, Chrome, Word, PowerPoint, Teams

34°C Partly sunny

7:20 PM 10/22/2023

Object Manager | Salesforce

scadcollegeofengineeringan5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Star

+

?

Settings

12

Avatar

Setup

Home

Object Manager

SETUP

Object Manager

1 Items, Sorted by Label

Loan

Schema Builder

Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Loan	suriya_c	Custom Object		20/10/2023	✓

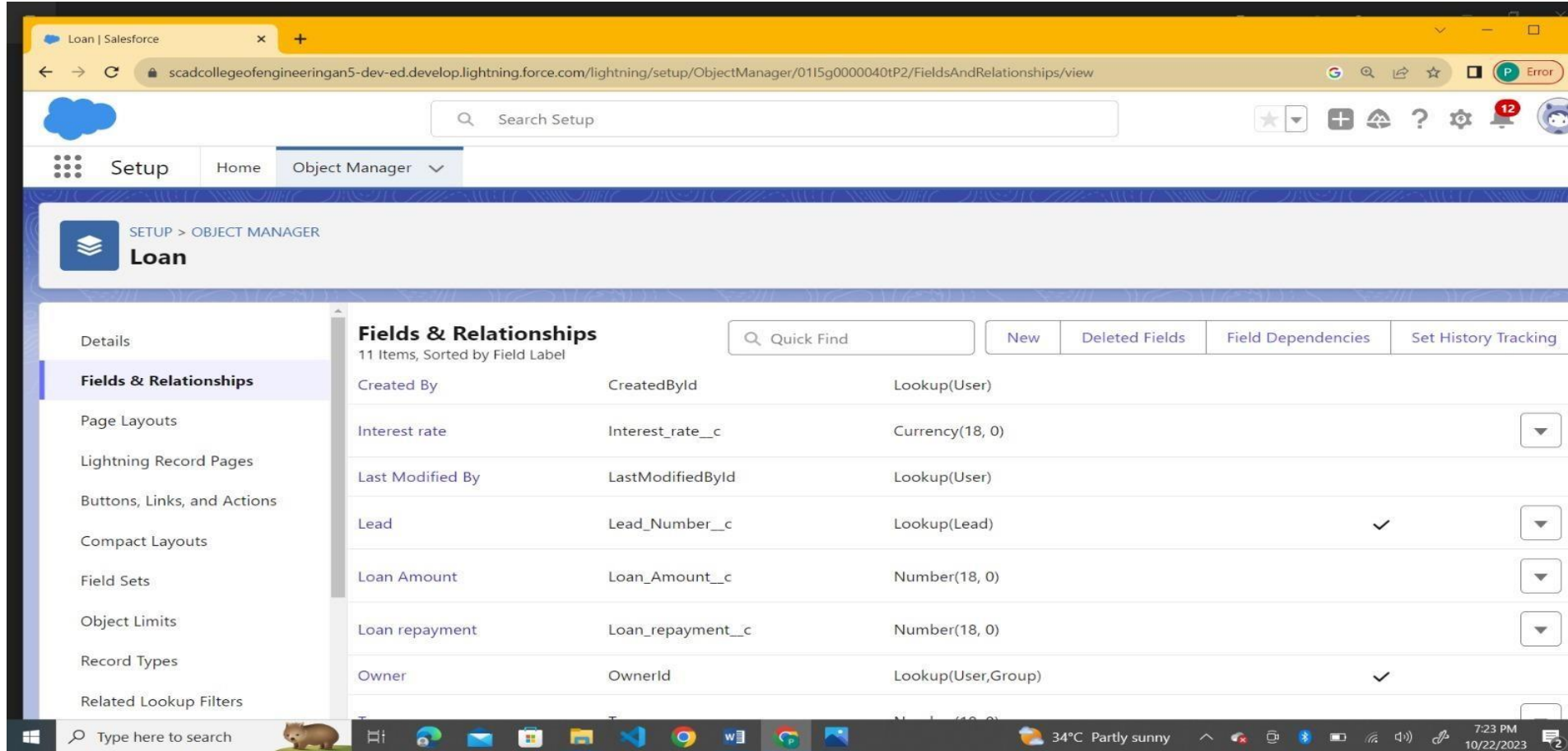
Type here to search

Taskbar icons: File Explorer, Edge, Mail, Calendar, Photos, Word, PowerPoint, Teams

34°C Partly sunny

7:21 PM 10/22/2023

## Step 3: Create Fields for Respective Object(Enquiry,Property,Loan)



The screenshot displays the Salesforce Setup interface for the 'Loan' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area shows a list of 11 fields, sorted by label. The fields are:

Field Label	Field Name	Field Type	Field Properties
Created By	CreatedBy	Lookup(User)	
Interest rate	Interest_rate__c	Currency(18, 0)	
Last Modified By	LastModifiedBy	Lookup(User)	
Lead	Lead_Number__c	Lookup(Lead)	✓
Loan Amount	Loan_Amount__c	Number(18, 0)	
Loan repayment	Loan_repayment__c	Number(18, 0)	
Owner	OwnerId	Lookup(User,Group)	✓

The interface includes a search bar at the top, a 'Quick Find' search bar, and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

## Related Lookup Filters

Quick Find

### Set History Tracking

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



New Enquiry | Salesforce

scadcollegeofengineeringan5-dev-ed.develop.lightning.force.com/lightning/o/Enquiry\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&...

Project Manager

Enquiry  
**Prakash**

Related

Details

Enquiry Name  
Prakash

State  
RAjasthan

City  
jaipur

Created By  
Suriya M, 22/10/2023

New Opportunity

New Enquiry

\* = Required Information

Information

\* Enquiry Name

Owner

Suriya M

State

--None--

[View all dependencies](#)

City

--None--

[View all dependencies](#)

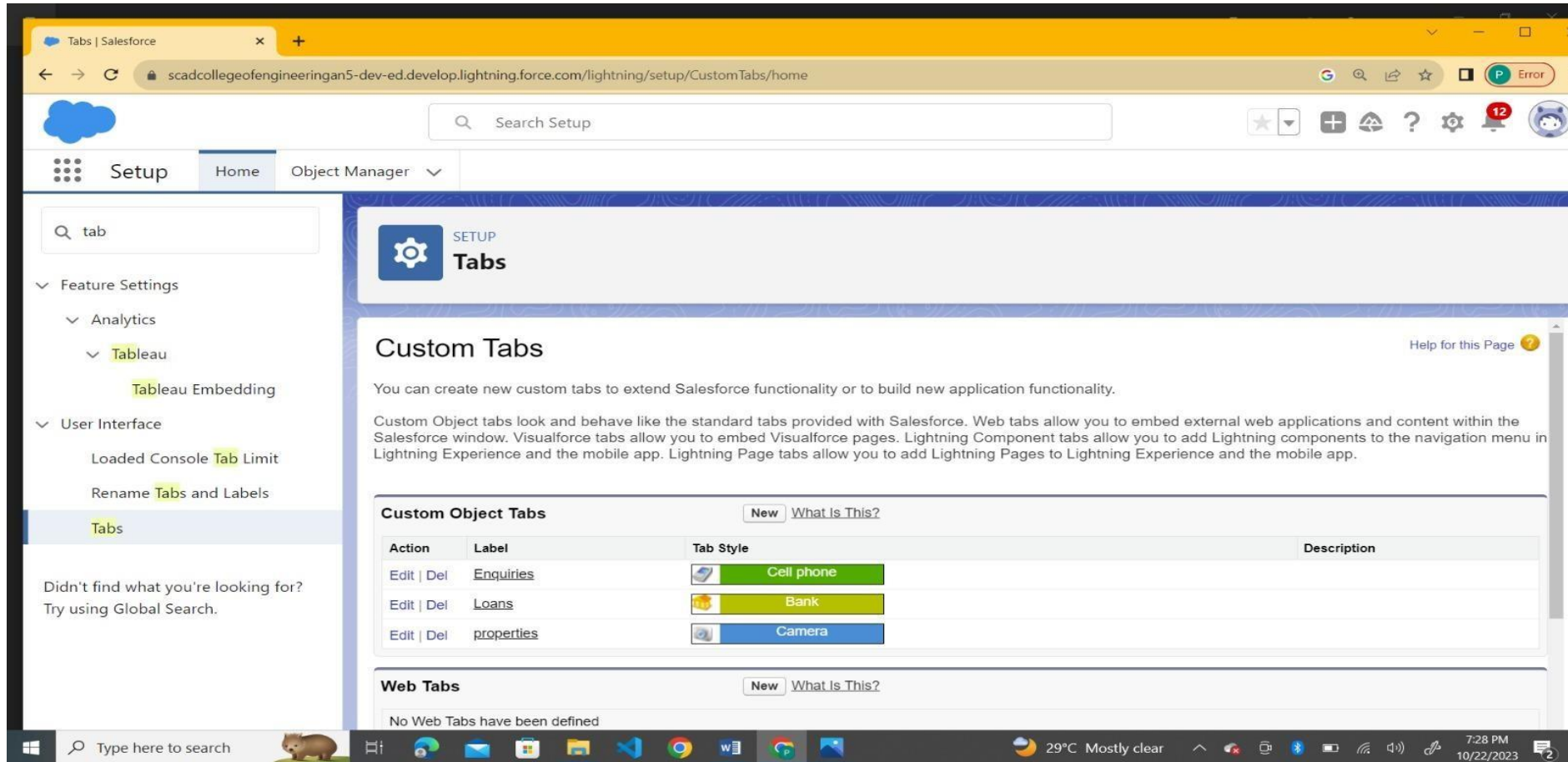
Cancel

Save & New

Save



## Step 4: Create the tab for each object(Enquiry,Property,Loan)



The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with 'tab' entered and a list of settings categories: Feature Settings, Analytics, Tableau, and User Interface. Under User Interface, 'Loaded Console Tab Limit' and 'Rename Tabs and Labels' are visible. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a paragraph explaining that custom tabs can be created to extend Salesforce functionality. A section titled 'Custom Object Tabs' contains a table with three rows: 'Enquiries' (Cell phone style), 'Loans' (Bank style), and 'properties' (Camera style). Each row has 'Edit' and 'Del' links. Below this, a 'Web Tabs' section states 'No Web Tabs have been defined'. The bottom of the image shows a Windows taskbar with various application icons and a system clock indicating 7:28 PM on 10/22/2023.

Setup

Home Object Manager

Search Setup

tab

Feature Settings

Analytics

Tableau

Tableau Embedding

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

SETUP  
Tabs

Custom Tabs

Help for this Page

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

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

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit   Del	Enquiries	Cell phone	
Edit   Del	Loans	Bank	
Edit   Del	properties	Camera	

Web Tabs

New What Is This?

No Web Tabs have been defined

29°C Mostly clear 7:28 PM 10/22/2023

# Step 5: Create a Lightning App

App Manager | Salesforce

scadcollegeofengineeringan5-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app ma

Apps

App Manager

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

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

	App Name ↑	Developer Name	Description	Last Modified Date	App ...	Visi...
1	All Tabs	AllTabSet		20/10/2023, 12:20 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	20/10/2023, 12:20 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	20/10/2023, 12:20 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	20/10/2023, 12:23 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	20/10/2023, 12:20 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	20/10/2023, 12:20 pm	Classic	✓
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	20/10/2023, 12:20 pm	Lightning	✓
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	20/10/2023, 12:20 pm	Lightning	✓
9	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	20/10/2023, 12:20 pm	Lightning	✓
10	Marketing	Marketing	Best-in-class on-demand marketing automation	20/10/2023, 12:20 pm	Classic	✓
11	Platform	Platform	The fundamental Lightning Platform	20/10/2023, 12:20 pm	Classic	
12	Project Management	Project_Management		22/10/2023, 12:20 pm	Lightning	✓
13	Queue Management	QueueManagement	Create and manage queues for your business.	20/10/2023, 12:20 pm	Lightning	✓
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	20/10/2023, 12:20 pm	Classic	

28°C Partly cloudy 11:31 PM 10/22/2023

## Step 6: Create the Profiles

Profiles | Salesforce

scadcollegeofengineeringan5-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

profiles

Users

Profiles

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

SETUP Profiles

Profiles

Help for this Page

All Profiles Edit Delete Create New View

New Profile

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	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Identity User	Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del  ...	Maharaja	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del  ...	Marketing Executive	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del  ...	Marketing Manager	Salesforce	<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"/>
<input type="checkbox"/> Edit   Del  ...	Mugeshwaren	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>

26-50 of 50 0 Selected

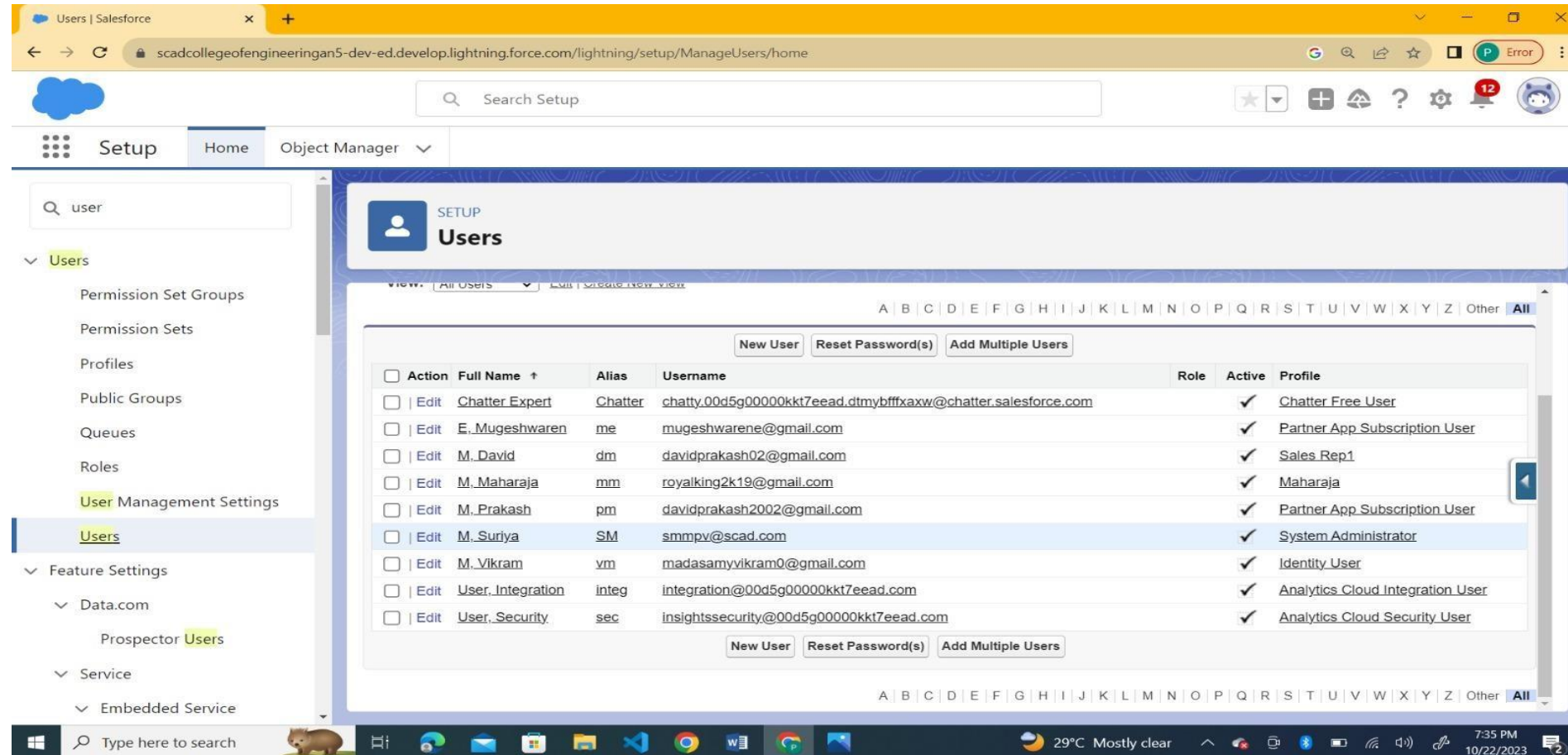
Page 2 of 2

Type here to search

29°C Mostly clear

7:35 PM 10/22/2023

## Step 7: Create the Users (Salesmanager, Marketing Executive, Sales rep1, rep2)



The screenshot displays the Salesforce Setup interface for managing users. The left sidebar shows the navigation menu with 'Users' selected. The main content area shows a list of users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The 'M. Suriya' user is highlighted in blue.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5g00000kkt7eead.dtmybfffaxw@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	E. Mugeshware	me	mugeshwarene@gmail.com		✓	Partner App Subscription User
<input type="checkbox"/> Edit	M. David	dm	davidprakash02@gmail.com		✓	Sales Rep1
<input type="checkbox"/> Edit	M. Maharaja	mm	royalking2k19@gmail.com		✓	Maharaja
<input type="checkbox"/> Edit	M. Prakash	pm	davidprakash2002@gmail.com		✓	Partner App Subscription User
<input type="checkbox"/> Edit	M. Suriya	SM	smmpv@scad.com		✓	System Administrator
<input type="checkbox"/> Edit	M. Vikram	vm	madasamyvikram0@gmail.com		✓	Identity User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5g00000kkt7eead.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5g00000kkt7eead.com		✓	Analytics Cloud Security User

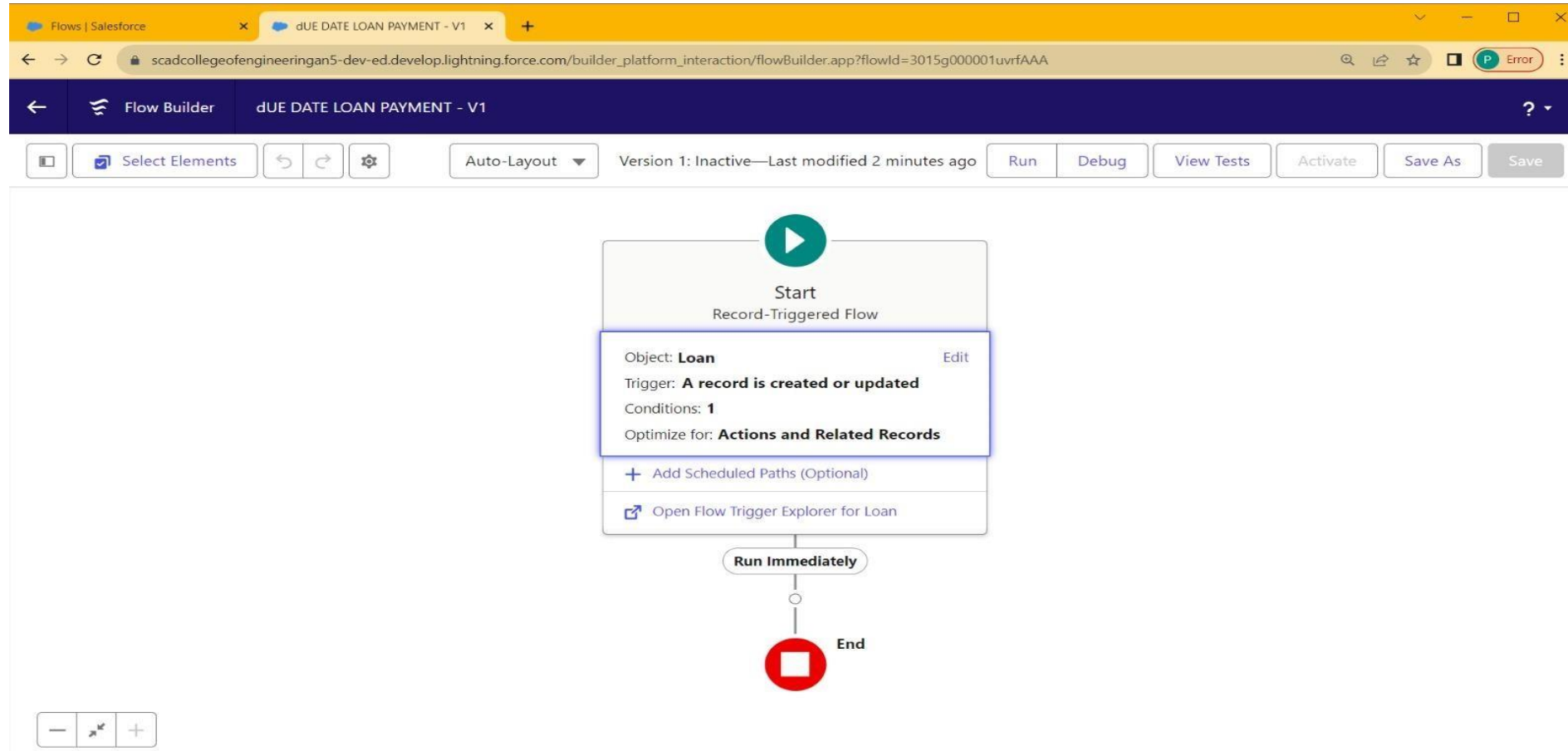
## Step 8: Create the permission set for the users

The screenshot shows the Salesforce 'Permission Sets' page. The browser address bar displays the URL: `scadcollegeofengineeringan5-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home`. The left sidebar contains navigation links: 'Setup', 'Home', and 'Object Manager'. Below these, a search bar shows 'permis'. The main content area is titled 'Permission Sets' and includes a sub-header 'On this page you can create, view, and manage permission sets.' Below this, there is a filter dropdown set to 'All Permission Sets' and buttons for 'Edit', 'Delete', and 'Create New View'. A table lists various permission sets, each with a 'Clone' action, a 'Permission Set Label', a 'Description', and a 'License'. The table is paginated, showing 'Page 1 of 2'.

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see produc...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access ...	B2B Buyer Manager Permission Set One Seat
Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific...	Cloud Integration User
Clone	CRM User	Denotes that the user is a Sales Cloud or Service ...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that ...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice con...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voic...	Service Cloud Voice User



## Step 9: Create A Flow



# Step 10: Create Reports

Report Builder | Salesforce

scadcollegeofengineeringan5-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzljp7InJlY29yZEIkl...

Search...

Project Management Enquiries properties Loans Reports Dashboards

REPORT ▼  
New Loans Report Loans

↶ ↷ Add Chart Save & Run Save Close Run

Outline Filters 1

Fields

Groups

GROUP ROWS

Add group...

Columns

Add column...

Loan: 9360785457

✓ Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Loan: 9360785457

No records returned. Try editing report filters:

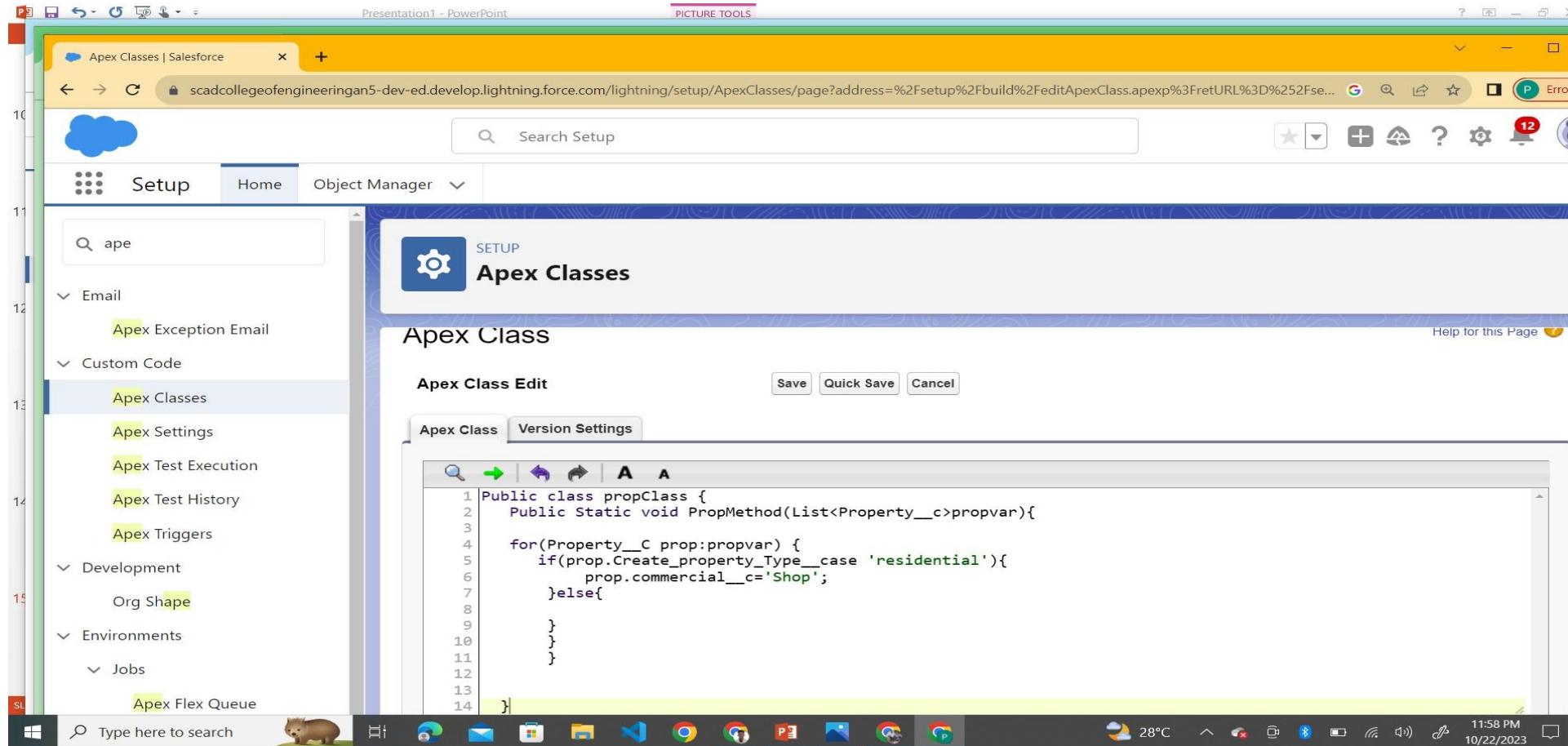
- Show All loans.
- Edit other filters in the filter panel.

Type here to search

34°C Partly sunny 3:59 PM 10/22/2023



# Step 11: Apex triggers and apex Class



The screenshot shows the Salesforce 'Apex Classes' setup page. The browser address bar displays the URL: `scadcollegeofengineeringan5-dev-ed.develop.lightning.force.com/lightning/setup/ApexClasses/page?address=%2Fsetup%2Fbuild%2FeditApexClass.apexp%3FretURL%3D%252Fse...`. The left sidebar contains a search bar with 'ape' and a list of navigation items: Email, Custom Code, Apex Classes (selected), Apex Settings, Apex Test Execution, Apex Test History, Apex Triggers, Development, Org Shape, Environments, and Jobs. The main content area is titled 'Apex Classes' and 'Apex Class Edit'. It features a code editor with the following Apex code:

```
1 Public class propClass {
2     Public Static void PropMethod(List<Property__c>propvar){
3
4     for(Property__C prop:propvar) {
5         if(prop.Create_property_Type__case 'residential'){
6             prop.commercial__c='Shop';
7         }else{
8
9         }
10    }
11 }
12
13
14 }
```

The code editor includes a toolbar with icons for search, undo, redo, and text formatting. The bottom of the screen shows the Windows taskbar with the time 11:58 PM and date 10/22/2023.