

- **INTRODUCTION**

- Overview

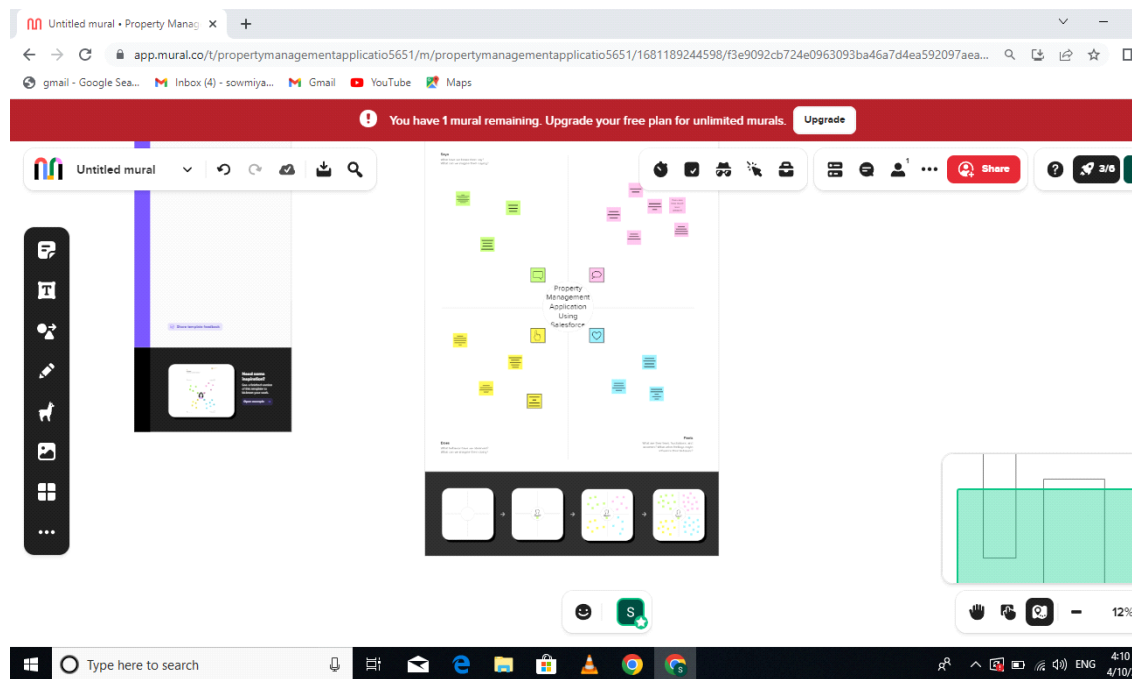
- Salesforce is game-changing technology. Host of productively-boosting features. Help you sell smarter and faster you work to word your badge for this module.

- Purpose

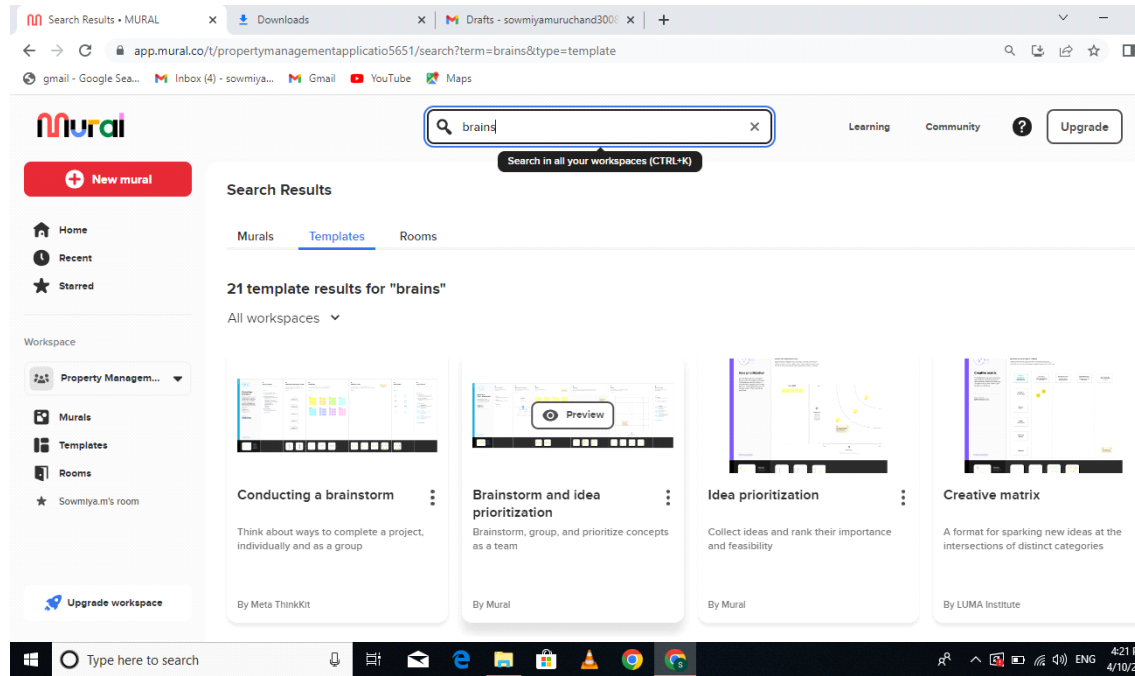
Salesforce is your customer platform,designed to help you sell,service,market,analyze,and connect with your customers. Using standard product and features, you can manage relationships with prospects and customers,collaborate and engage with employes and partners, and store your data securely in the cloud.

- **Problem Definition & Design Thinking**

- Empathy Map :

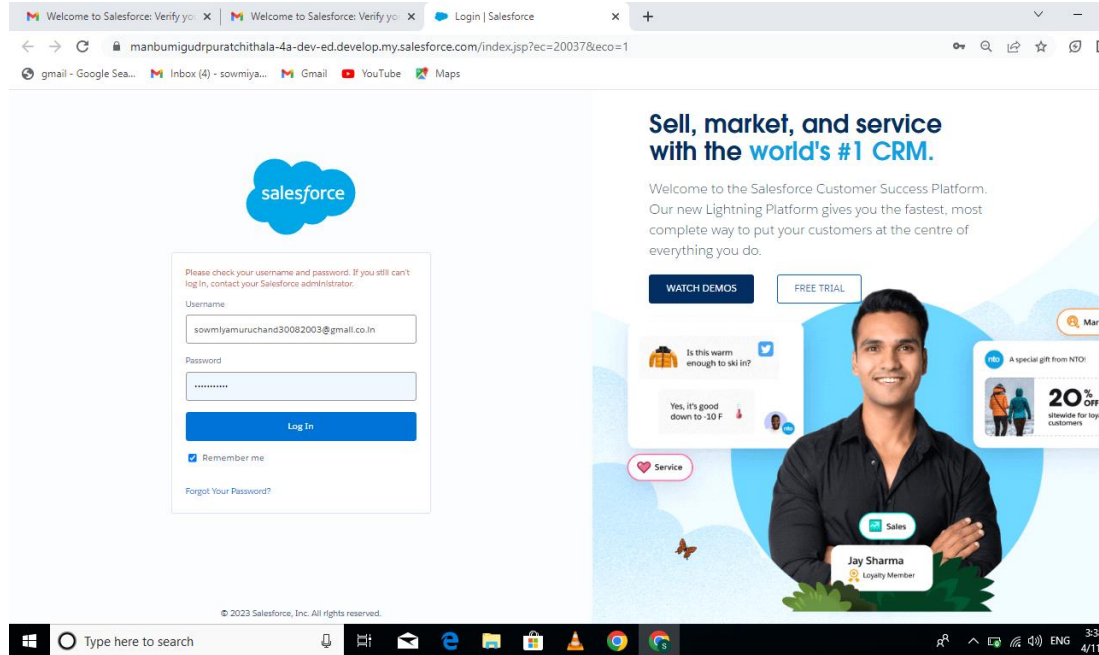


- Ideation & Brainstorming Map :

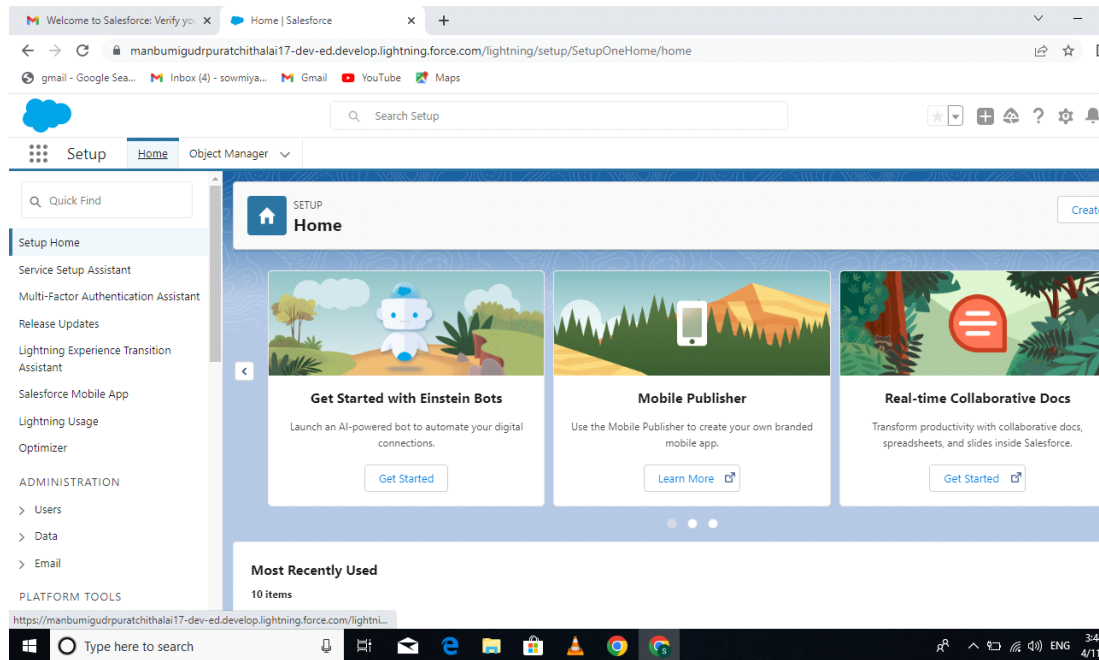


- **RESULT**
- Data Model:s

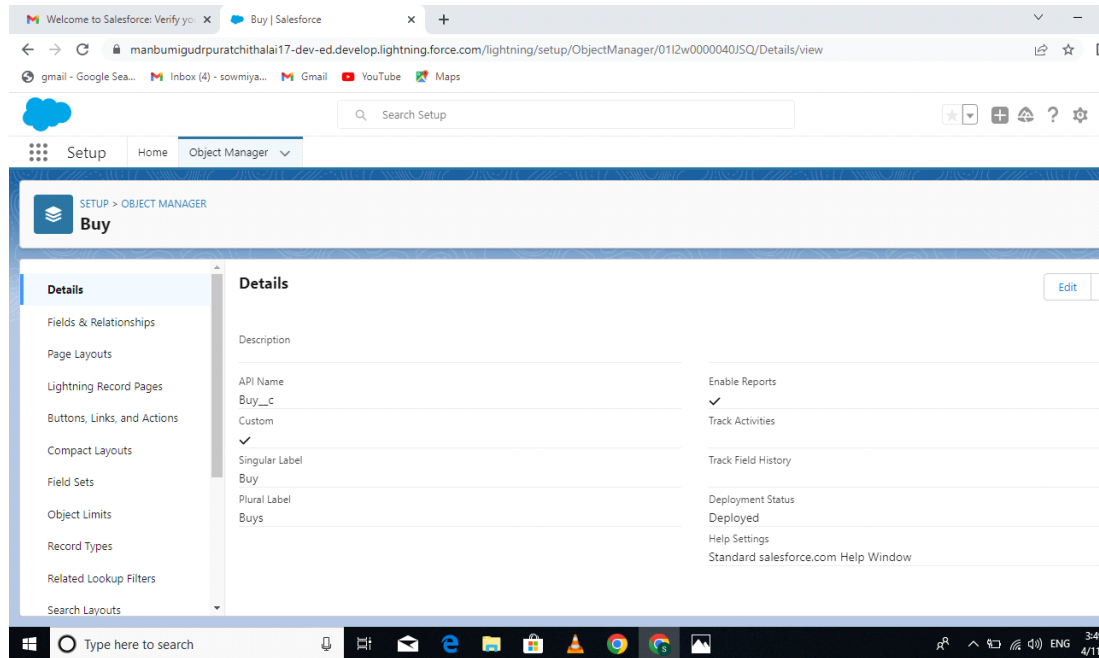
Object name	Fields in the Objects	
Buy	Field label	Data type
	Property Type	Picklist
	Discount	Percentage
	State	Picklist
	City	Dependency
Rent	Field label	Data type
	Rent	Auto Number
	Rental City	Text
	BHK type	Picklist
Loan	Field label	Data type
	Loan ID	Auto Number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total Loan	Number



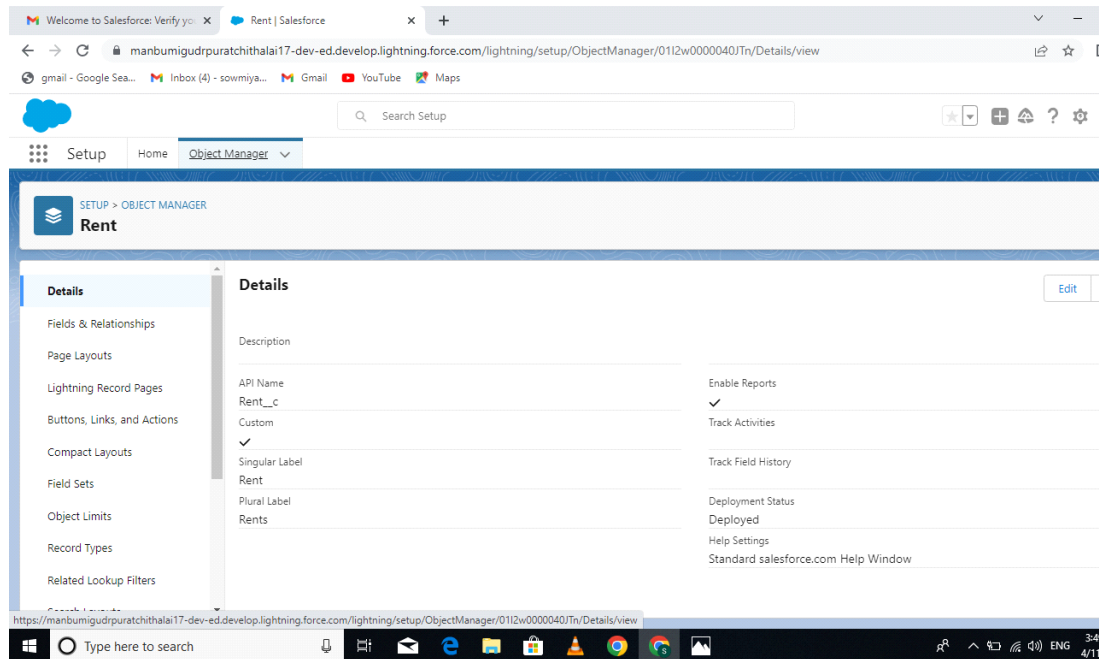
- In this activity is go to the Home page:



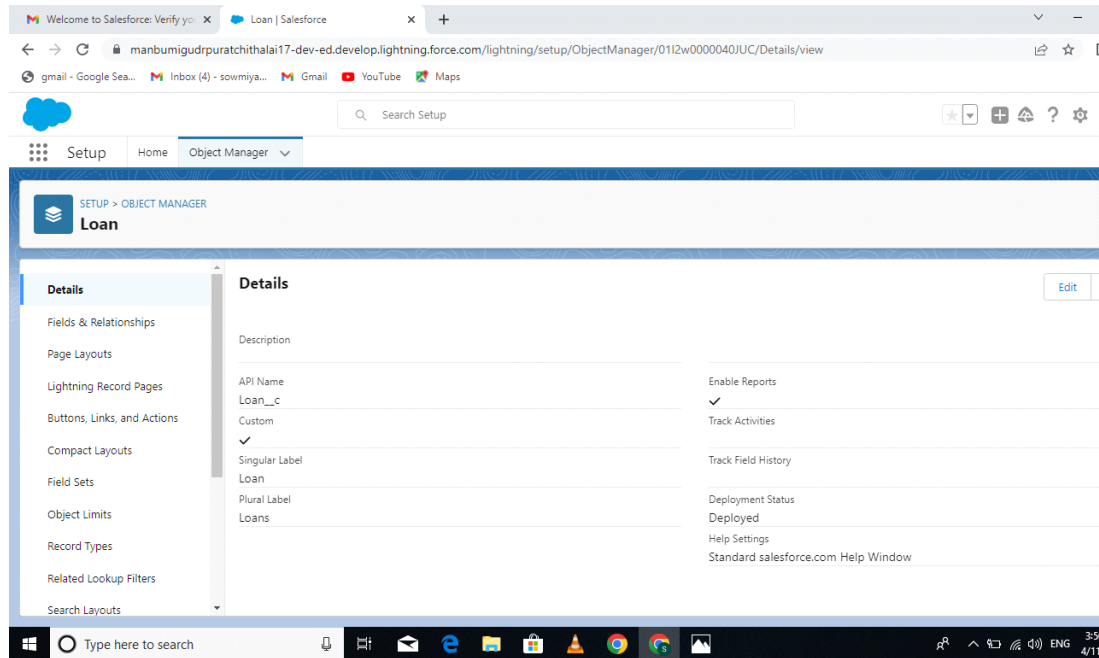
- In this activity is create to an object:
- 1.Buy:

• The screenshot shows the Salesforce Object Manager setup page for the 'Buy' object. The browser address bar displays the URL: manbumigudrpatchithalai17-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040JSQ/Details/view. The left sidebar contains a 'Details' menu with options: 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 includes an 'Edit' button. It lists various settings for the 'Buy' object, including API Name (Buy__c), Custom (checked), Singular Label (Buy), Plural Label (Buys), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window.

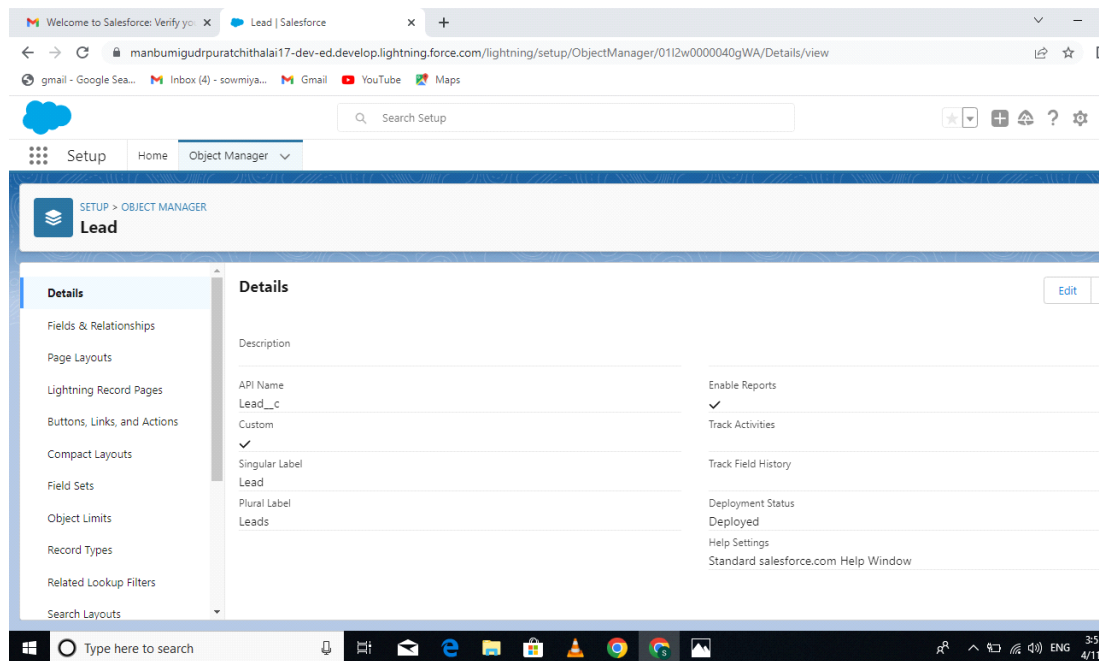
• **2.Rent:**

• The screenshot shows the Salesforce Object Manager setup page for the 'Rent' object. The browser address bar displays the URL: manbumigudrpatchithalai17-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040JTrv/Details/view. The left sidebar contains a 'Details' menu with options: 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 includes an 'Edit' button. It lists various settings for the 'Rent' object, including API Name (Rent__c), Custom (checked), Singular Label (Rent), Plural Label (Rents), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window.

• **3.Loan:**

•  This screenshot shows the Salesforce Object Manager interface for the 'Loan' object. The left sidebar contains a 'Details' menu with options like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Details' and displays various configuration settings. The 'API Name' is 'Loan__c', and the 'Singular Label' is 'Loan'. The 'Enable Reports' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link points to 'Standard salesforce.com Help Window'.

• 4. Lead:

•  This screenshot shows the Salesforce Object Manager interface for the 'Lead' object. The left sidebar contains a 'Details' menu with options like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Details' and displays various configuration settings. The 'API Name' is 'Lead__c', and the 'Singular Label' is 'Lead'. The 'Enable Reports' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link points to 'Standard salesforce.com Help Window'.

• In this activity is create to Tab:

Welcome to Salesforce: Verify you are logged in

manbumigudruratchithalai17-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Search Setup

Setup Home Object Manager

Quick Find: Tab

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

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

Custom Tabs

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	Buys	Computer	
Edit Del	Leads	Hands	
Edit Del	Loans	Bell	
Edit Del	Rents	Laptop	

Web Tabs

New What Is This?

No Web Tabs have been defined

In this activity is create to Lightning App:

Welcome to Salesforce: Verify you are logged in

manbumigudruratchithalai17-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management
- > Apps
- App Manager**

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning ☐ Disabled

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

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		31/03/2023, 10:40 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	31/03/2023, 10:40 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	31/03/2023, 10:40 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	31/03/2023, 10:42 am	Lightning	✓
5	Community	Community	Salesforce CRM Communities	31/03/2023, 10:40 am	Classic	✓
6	Content	Content	Salesforce CRM Content	31/03/2023, 10:40 am	Classic	✓

In this activity is create to the Lead Field:

Setup > OBJECT MANAGER
Customer

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

Fields & Relationships
5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Customer Status Type	CustomerStatusType	Picklist		
Lead	Lead_c	Email		
Name	Name	Text(255)		✓
Party	PartyId	Lookup(Individual)		✓
Total Life Time Value	TotalLifeTimeValue	Number(9, 0)		

To create a new Profile:

Setup > Profiles

Profiles

Profile
Custom: Sales Profile

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.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) |
 [Enabled Apex Class Access](#) |
 [Enabled Visualforce Page Access](#) |
 [Enabled External Data Source Access](#) |
 [Enabled Named Credentials Access](#) |
 [Enabled Custom Metadata Type Access](#) |
 [Enabled Custom Setting Definitions Access](#) |
 [Enabled Flow Access](#) |
 [Enabled Service Presence Status Access](#) |
 [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Custom: Sales Profile	Custom Profile
User License	Salesforce	✓
Description		
Created By	sowmiya.M. 31/03/2023, 10:40 am	Modified By sowmiya.M. 05/04/2023, 2:22 pm

Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Global Layout View Assignment	Object Milestone Layout View Assignment
Home Page Layout	Not Assigned View Assignment	Operating Hours Layout View Assignment
Account	DE Default View Assignment	Opportunity/Sales Layout View Assignment
Alternative Payment Method	Account/Sales Layout View Assignment	Opportunity Product Layout View Assignment
	Alternative Payment Method Layout	Order Layout

To create new user :

Windows browser window showing the Salesforce Setup page for Users.

Address bar: `manbumigudrputrachithalai17-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000Gmk0eAAB%3FnoRedirect%3D1...`

Navigation tabs: Setup, Home, Object Manager

Left sidebar (Setup menu):

- Setup Home
- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- ADMINISTRATION
 - Users
 - Permission Set Groups
 - Permission Sets
 - Profiles
 - Public Groups
 - Queues
 - Roles

Main content area: Users

User: Sowmiya Murugavel

Buttons: Edit, Sharing, Reset Password, Freeze

User Detail		Role
Name	Sowmiya Murugavel	Salesforce
Alias	smuru	User License
Email	ssowmiya@bumpuchand30082003@gmail.com	Profile
Username	murugandasowmiya30082003@gmail.com	Standard User
Nickname	User1800847075520224767	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver	Manager	Data.com User Type
		Accessibility Mode (Classic Only)

Create the Permission Sets:

Windows browser window showing the Salesforce Setup page for Permission Sets.

Address bar: `manbumigudrputrachithalai17-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0052w000009f487GAA%3FretURL%3D%252Fsetu...`

Navigation tabs: Setup, Home, Object Manager

Left sidebar (Setup menu):

- Setup Home
- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- ADMINISTRATION
 - Users
 - Permission Set Groups
 - Permission Sets
 - Profiles
 - Public Groups
 - Queues
 - Roles

Main content area: Permission Sets

Permission Set: Save

Buttons: Find Settings, Clone, Edit Properties, Manage Assignments

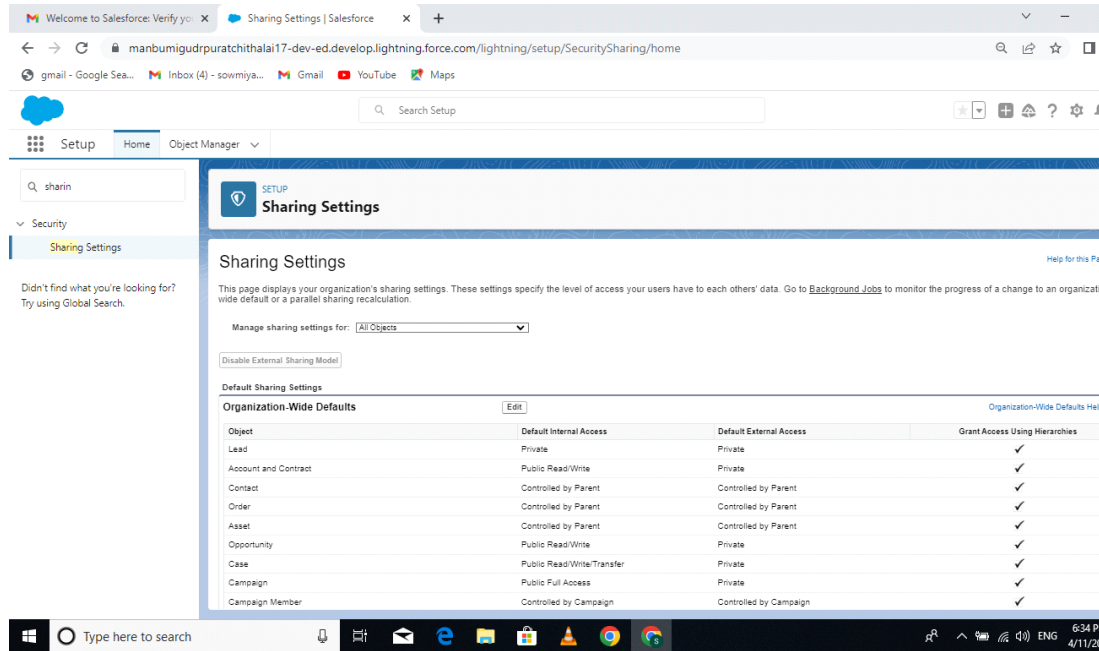
Permission Set Overview

Description	API Name	Save
License	Namespace Prefix	
Session Activation Required	Created By	ssowmiya_M, 05/04/2023, 2:28 pm
Last Modified By		

Apps

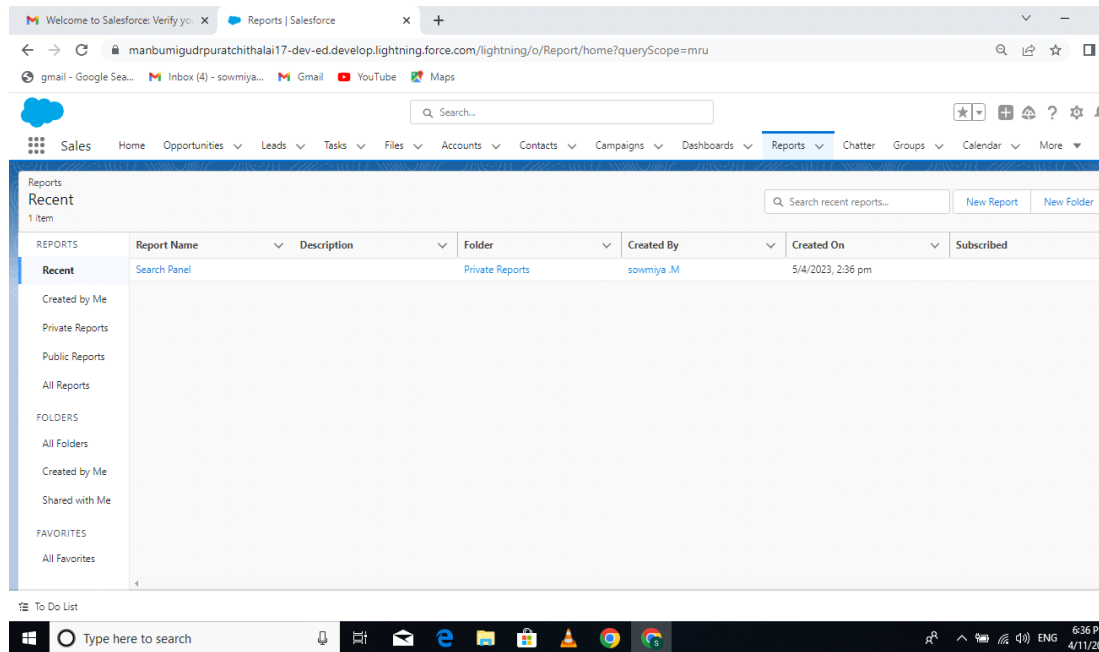
- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**

Create OWD Setting:

• The screenshot shows the Salesforce Sharing Settings page. The browser address bar displays the URL: manbumigudrpurchithalai17-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home. The page title is "Sharing Settings". Below the title, there is a section for "Default Sharing Settings" and a table titled "Organization-Wide Defaults". The table has four columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists various objects and their corresponding access settings.

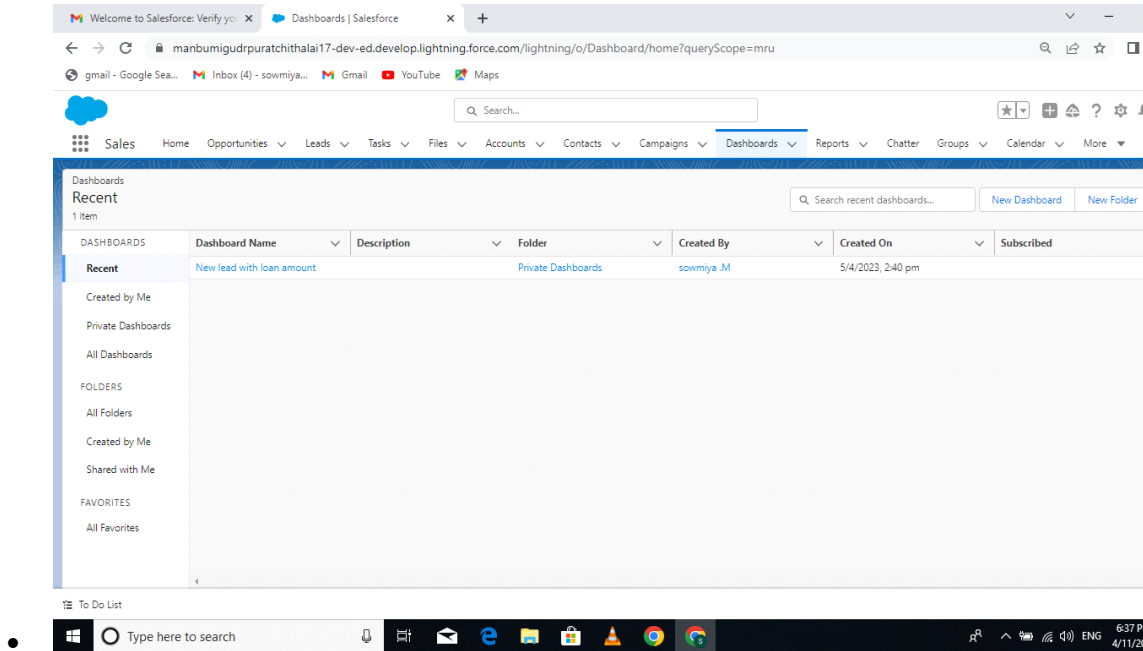
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓

• **Create Reports:**

• The screenshot shows the Salesforce Reports page. The browser address bar displays the URL: manbumigudrpurchithalai17-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrui. The page title is "Reports". Below the title, there is a section for "Recent" reports. The table lists the recent reports, including the "Recent" report itself.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Search Panel		Private Reports	sowmiya .M	5/4/2023, 2:36 pm	

• **In this activity to Create Dashboards:**



- Trailhead Profile Public URL:

Team Lead - <https://trailblazer.me/id/ssowmiyam> TeamMember 1 - <https://trailblazer.me/id/sshalu17>

Team Member 2 - <https://trailblazer.me/id/sebis3>

Team Member 3 - <https://trailblazer.me/id/satha61>

- ADVANTAGES & DISADVANTAGE**

ADVANTAGE: Property management is the supervision of residential, commercial, and industrial properties, including apartment, detached houses, condominium units, and shopping centers. It typically involves administering properties owned by another party or entity.

- PROPERTY MANAGEMENT:**
 - High-quality tenants
 - Less legal problems
 - Shorter periods of vacancy
 - Long-term tenants
 - More efficient rent collection
 - Lower repair and maintenance costs.

- **DISADVANTAGE:**

- Loss of control
- Expense
- Finding a reliable property manager.

- **APPLICATIONS:**

A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties.

- **CONCLUSION**

In conclusion property management system (PMS) software is very crucial for all the Hotels.

- **FUTURE SCOPE**

- Budgeting expense of the property
- Corrective maintenance or development of the property
- Maintenance and routine cleaning of the property ,While preserving its value.
- Working as a link between the seller and the buyer when real estate changes hands .