DR. M.G.R. GOVERNMENT ARTS AND SCIENCE COLLEGE FOR WOMEN

DEPARTMENT OF MATHEMATICS

NAAN MUDHALVAN PROJECT

III YEAR B.sc MATHEMATICS

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

TEAM ID	**B1175FE533D300BBA5D4CBAFC55F4891**
TEAM LEADER	**UMA G**
TEAM MEMBERS	**1. SWETHA E** **2. THENDRAL M** **3. UNNAMALAI A**

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

Project Based Experiential Learning Program

INTRODUCTION:

SALESFORCE is the world's leading CRM platform. A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties. PMS is also used in manufacturing industries, local government and manufacturing.

PMS provides a centralized computer system to organize, schedule and perform the day-to-day functions and transactions involved in accommodations businesses.

Working as a link between the seller and the buyer when real estate changes hands.

PURPOSE :

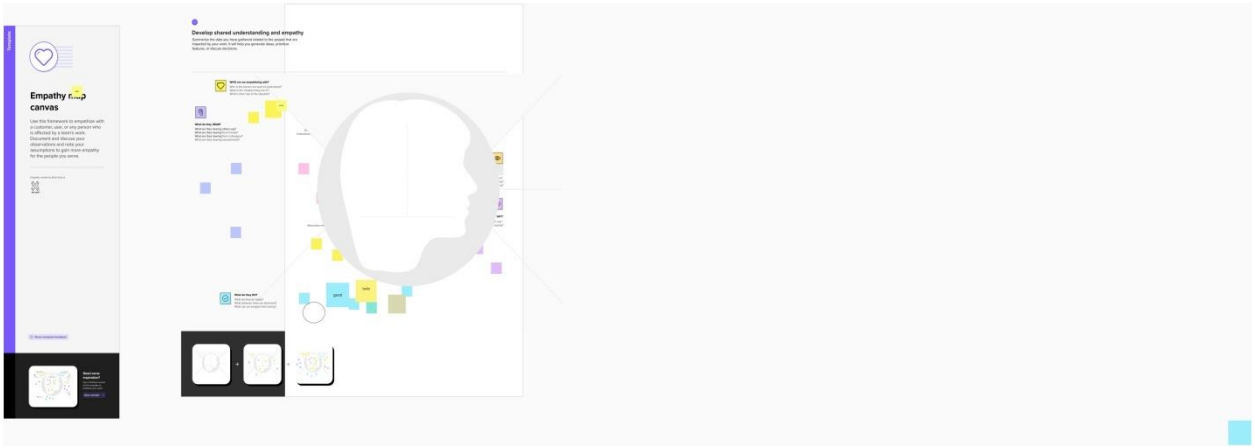
This is used to be responsible for the management of the service charge and the delivery of management and maintenance services at the development.

Five general functions of management:

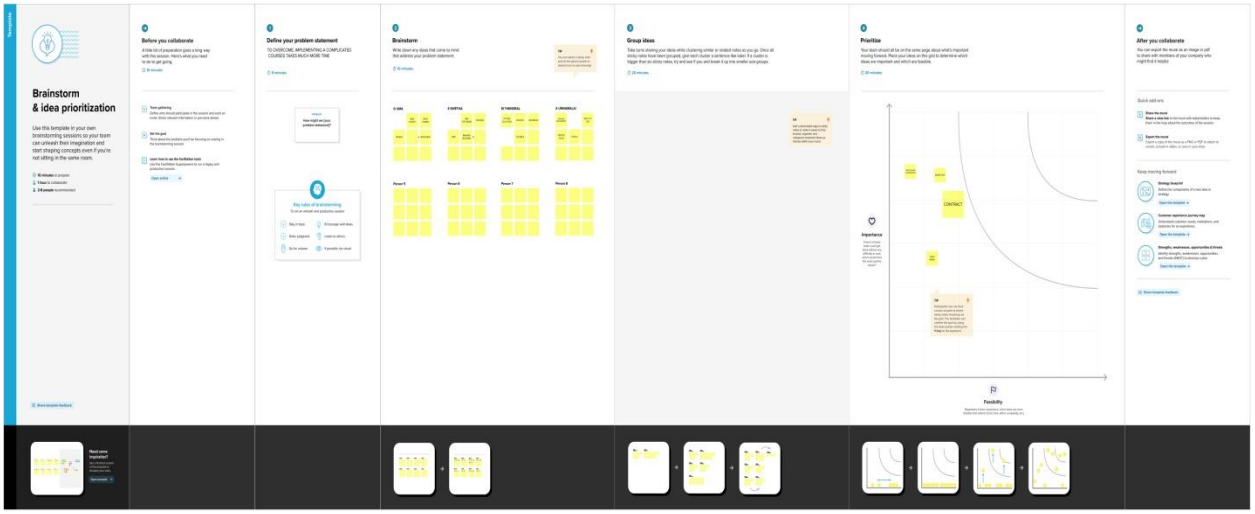
1. Planning
2. Organizing
3. Staffing
4. Leading
5. Controlling

PROBLEM DEFINITION AND DESIGN THINKING:

EMPATHY MAP:



IDEATION AND BRAINSTORMING:



DATA MODEL:

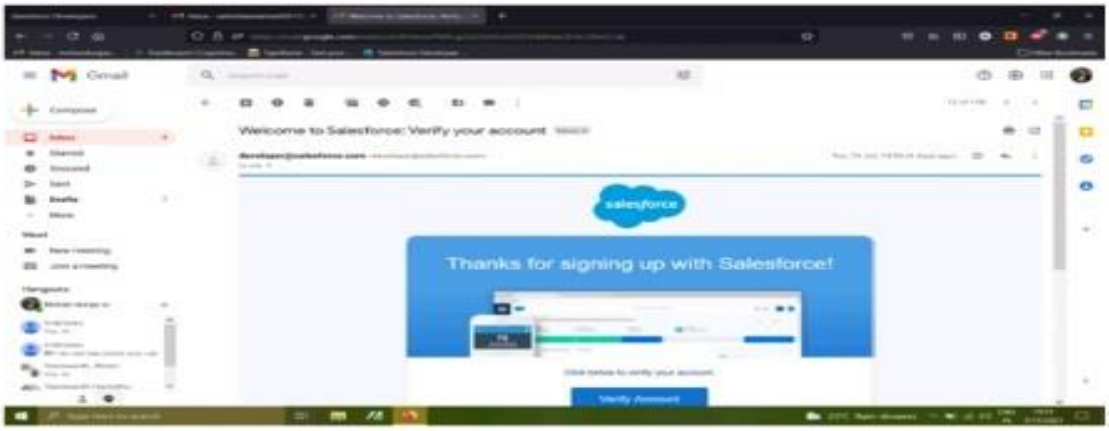
Object Name	Fields in the object

Field label	Data type
Buy	Custom
Rent	Custom
Loan	Custom

MILESTONE 1- SALESFORCE

Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



2.

2. Login To Your Salesforce Account

Milestone 2– Object

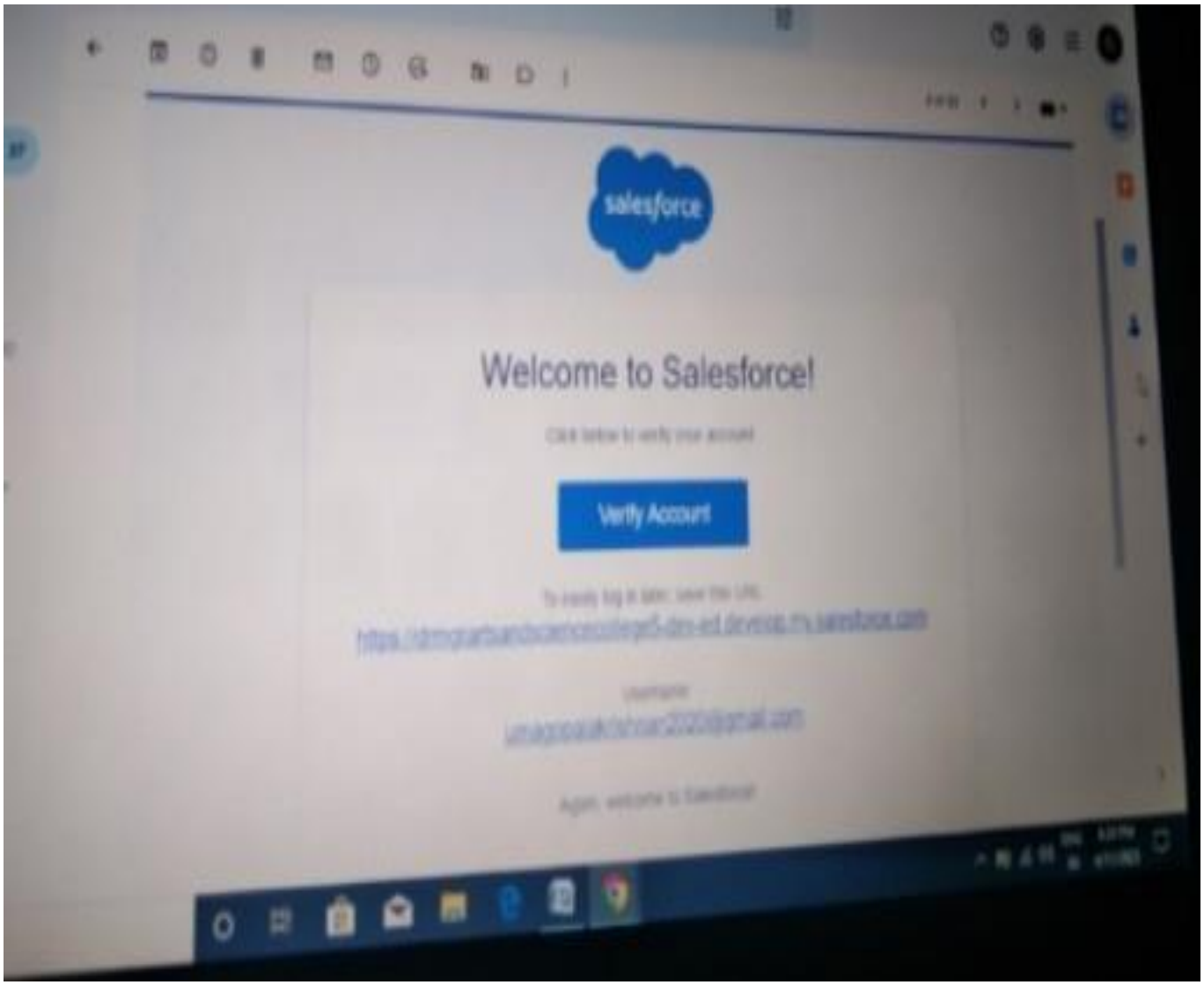
What Is Object?

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:

- **Standard Objects**: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **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.

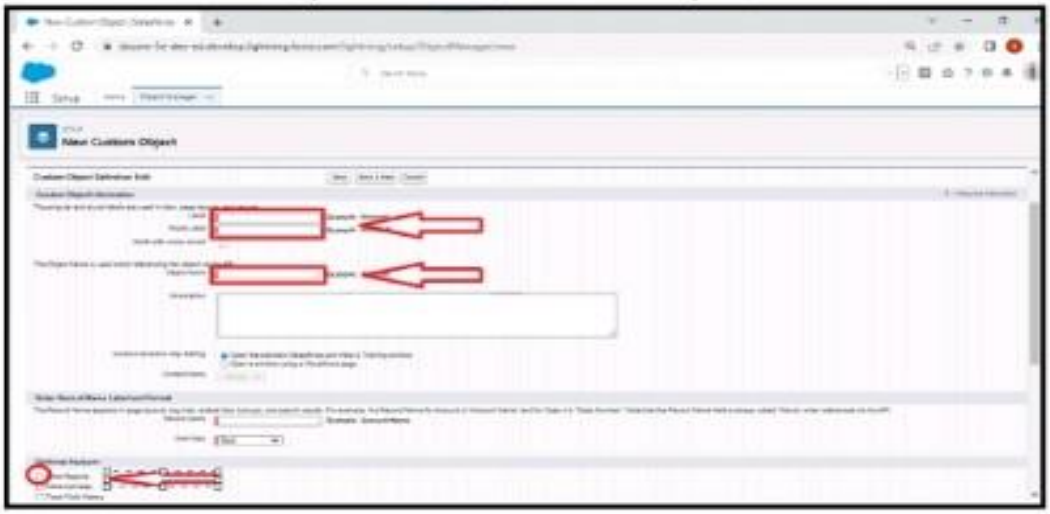
OUTPUT:



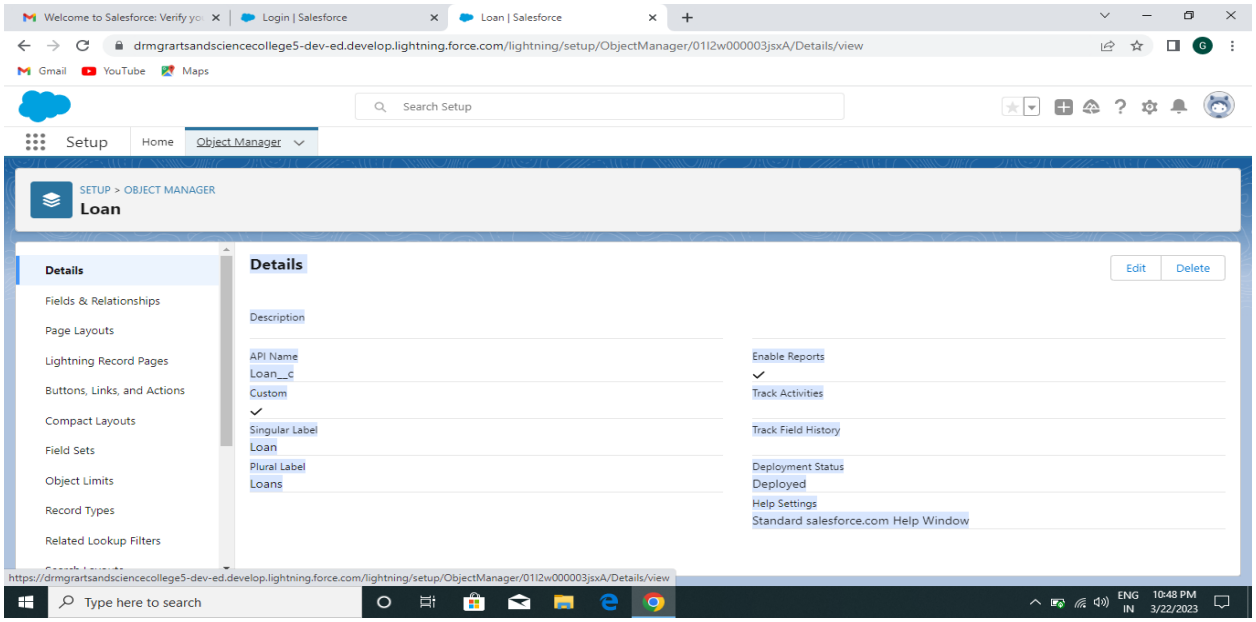
MILESTONE 2- OBJECT

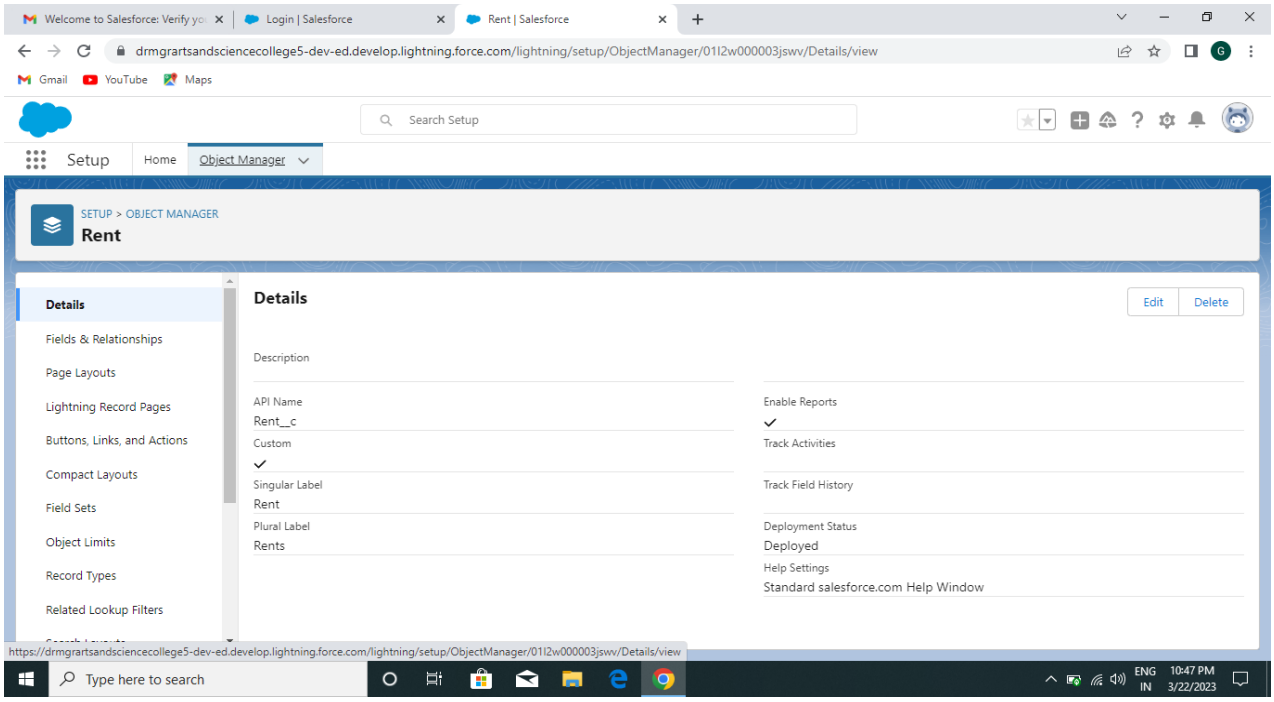
On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search → **Save**



OUTPUT:


Welcome to Salesforce: Verify yo
Login | Salesforce
Loan | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003jsxA/Details/view
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Loan
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Details
Edit
Delete
Description
API Name
Loan__c
Custom
Singular Label
Loan
Plural Label
Loans
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
https://drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003jsxA/Details/view
Type here to search
ENG
IN
10:48 PM
3/22/2023


Welcome to Salesforce: Verify yo
Login | Salesforce
Rent | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003jswv/Details/view
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Rent
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Details
Edit
Delete
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Rent
Plural Label
Rents
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
https://drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003jswv/Details/view
Type here to search
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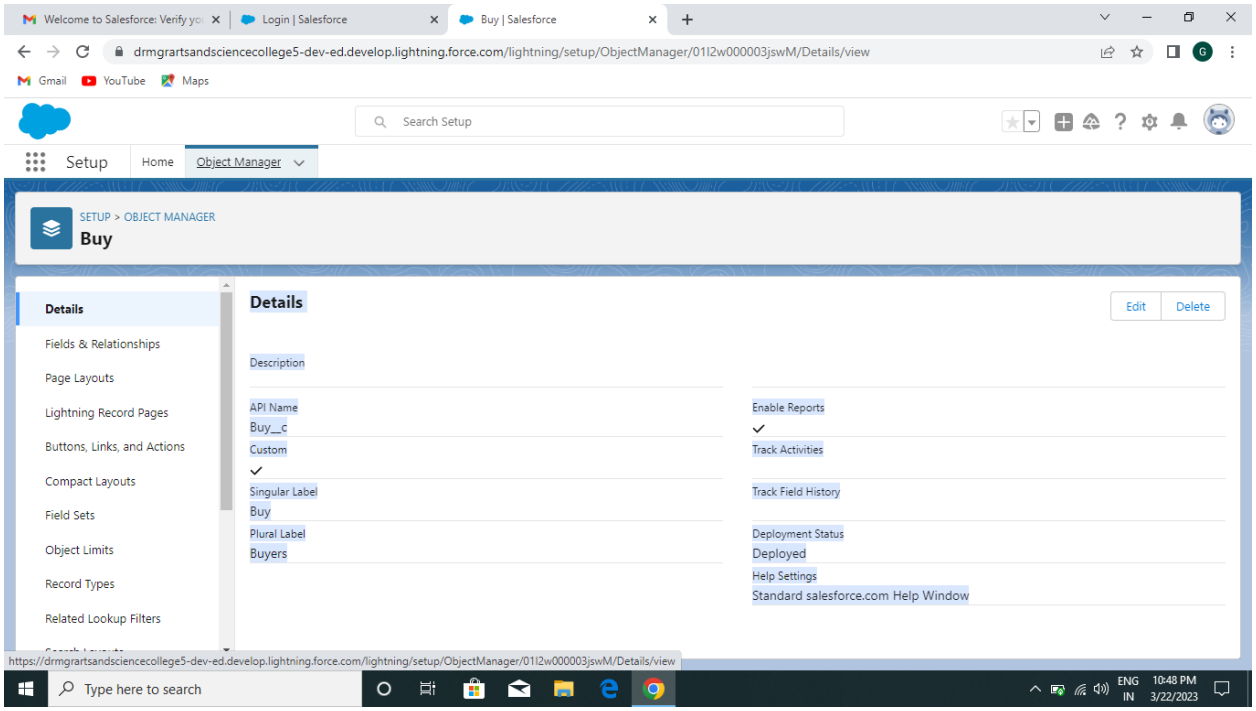

Welcome to Salesforce: Verify yo
Login | Salesforce
Buy | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003jswM/Details/view
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Buy
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Details
Edit
Delete
Description
API Name
Buy__c
Custom
Singular Label
Buy
Plural Label
Buyers
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
https://drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003jswM/Details/view
Type here to search
ENG
IN
10:48 PM
3/22/2023

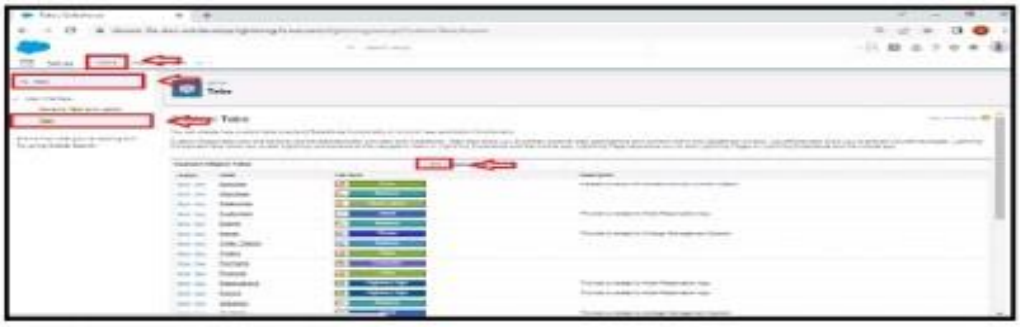
MILLESTONE 3- TAB

Activity 1:

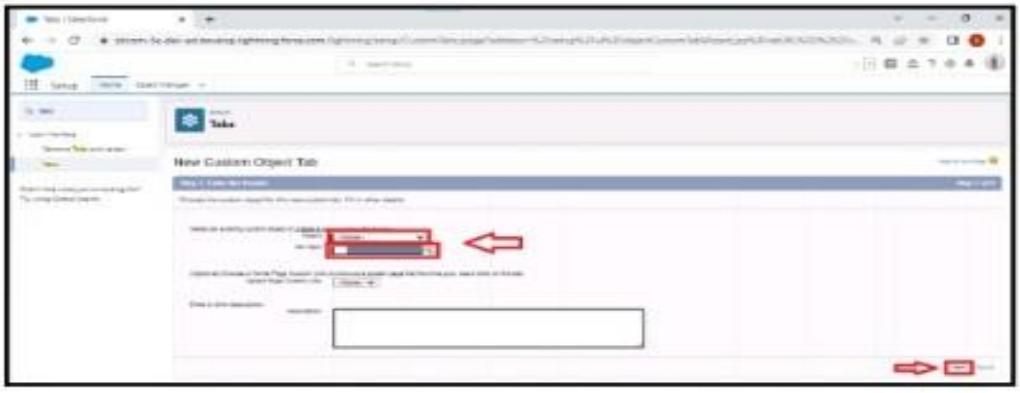
Create the Lightning Tab

To create a Tab:(Lead)

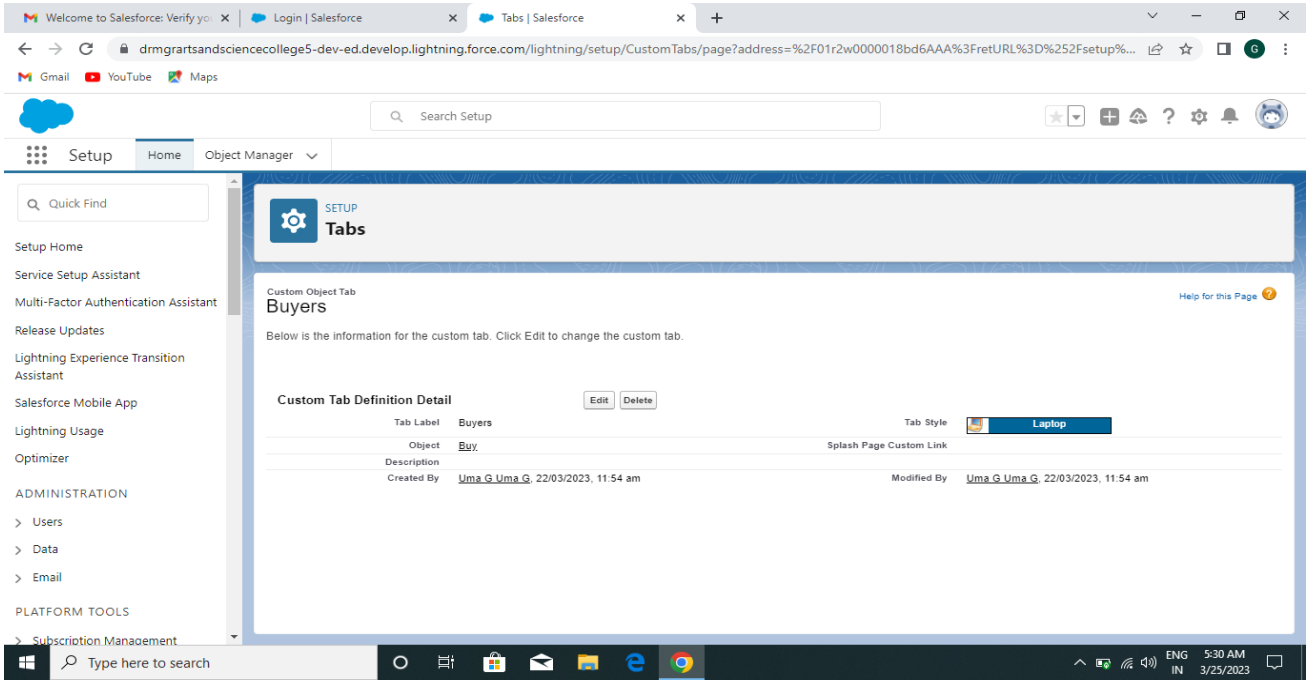
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)

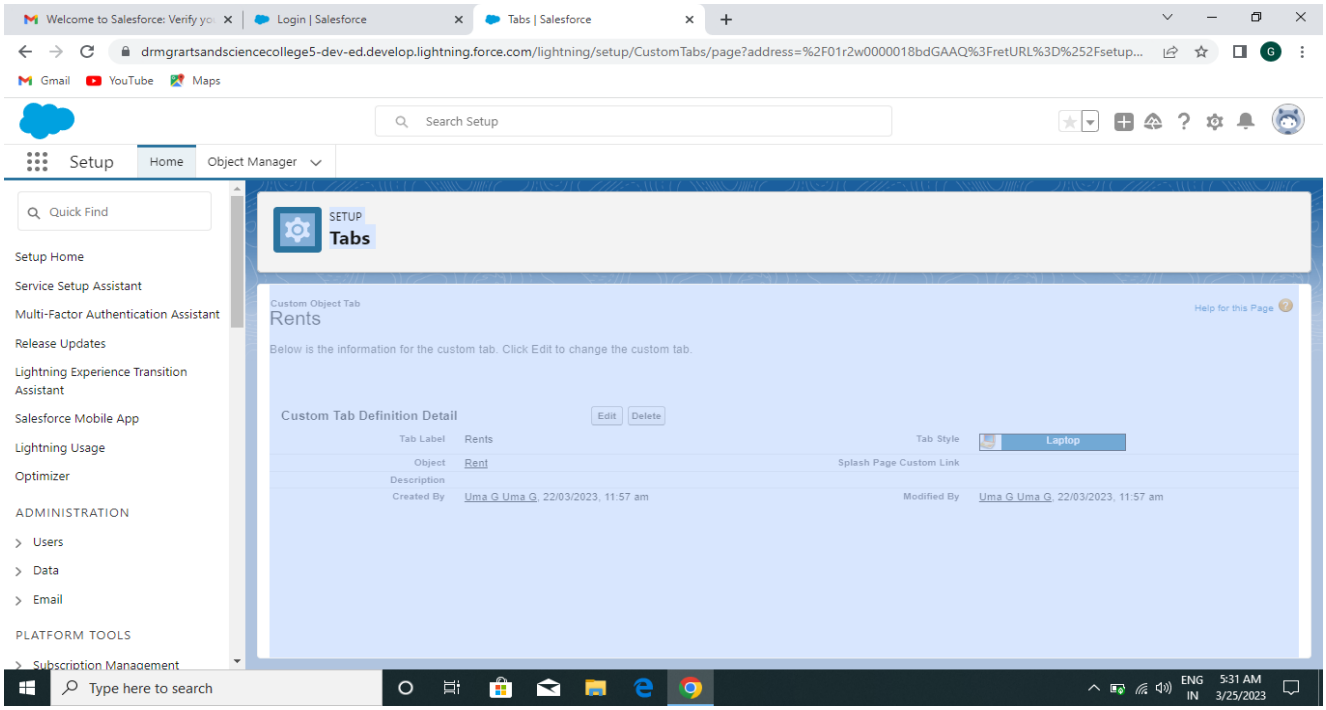


2. Select Object(Lead) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.



OUTPUT:


Welcome to Salesforce: Verify yo
Login | Salesforce
Tabs | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w0000018bd6AAA%3FretURL%3D%252Fsetup%...
Gmail
YouTube
Maps
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
SETUP
Tabs
Custom Object Tab
Buyers
Help for this Page
Below is the information for the custom tab. Click Edit to change the custom tab.
Custom Tab Definition Detail
Edit
Delete
Tab Label
Buyers
Tab Style
Laptop
Object
Buy
Splash Page Custom Link
Description
Created By
Uma G Uma G, 22/03/2023, 11:54 am
Modified By
Uma G Uma G, 22/03/2023, 11:54 am
Type here to search
ENG
IN
5:30 AM
3/25/2023


Welcome to Salesforce: Verify yo
Login | Salesforce
Tabs | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w0000018bdGAAQ%3FretURL%3D%252Fsetup...
Gmail
YouTube
Maps
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
SETUP
Tabs
Custom Object Tab
Rents
Help for this Page
Below is the information for the custom tab. Click Edit to change the custom tab.
Custom Tab Definition Detail
Edit
Delete
Tab Label
Rents
Tab Style
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Object
Rent
Splash Page Custom Link
Description
Created By
Uma G Uma G, 22/03/2023, 11:57 am
Modified By
Uma G Uma G, 22/03/2023, 11:57 am
Type here to search
ENG
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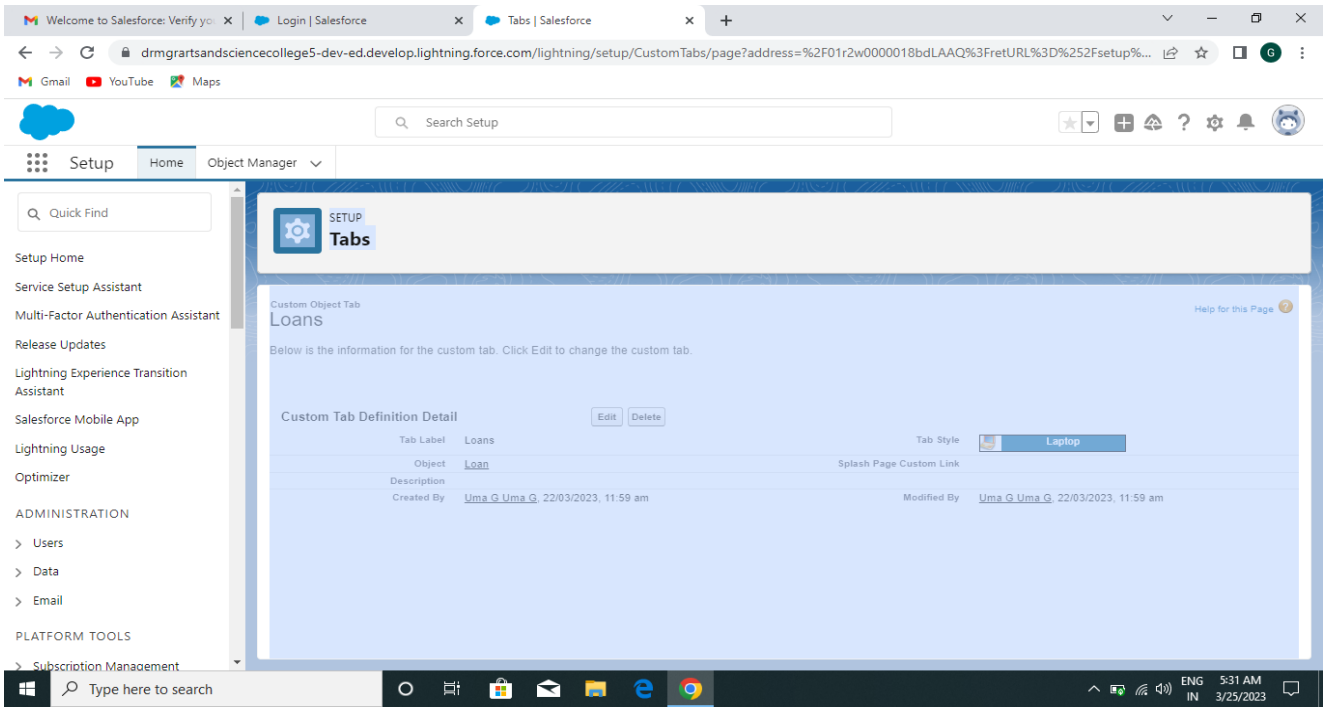
5:31 AM
3/25/2023


Welcome to Salesforce: Verify yo
Login | Salesforce
Tabs | Salesforce
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Gmail
YouTube
Maps
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
SETUP
Tabs
Custom Object Tab
Loans
Help for this Page
Below is the information for the custom tab. Click Edit to change the custom tab.
Custom Tab Definition Detail
Edit
Delete
Tab Label
Loans
Tab Style
Laptop
Object
Loan
Splash Page Custom Link
Description
Created By
Uma G Uma G, 22/03/2023, 11:59 am
Modified By
Uma G Uma G, 22/03/2023, 11:59 am
Type here to search
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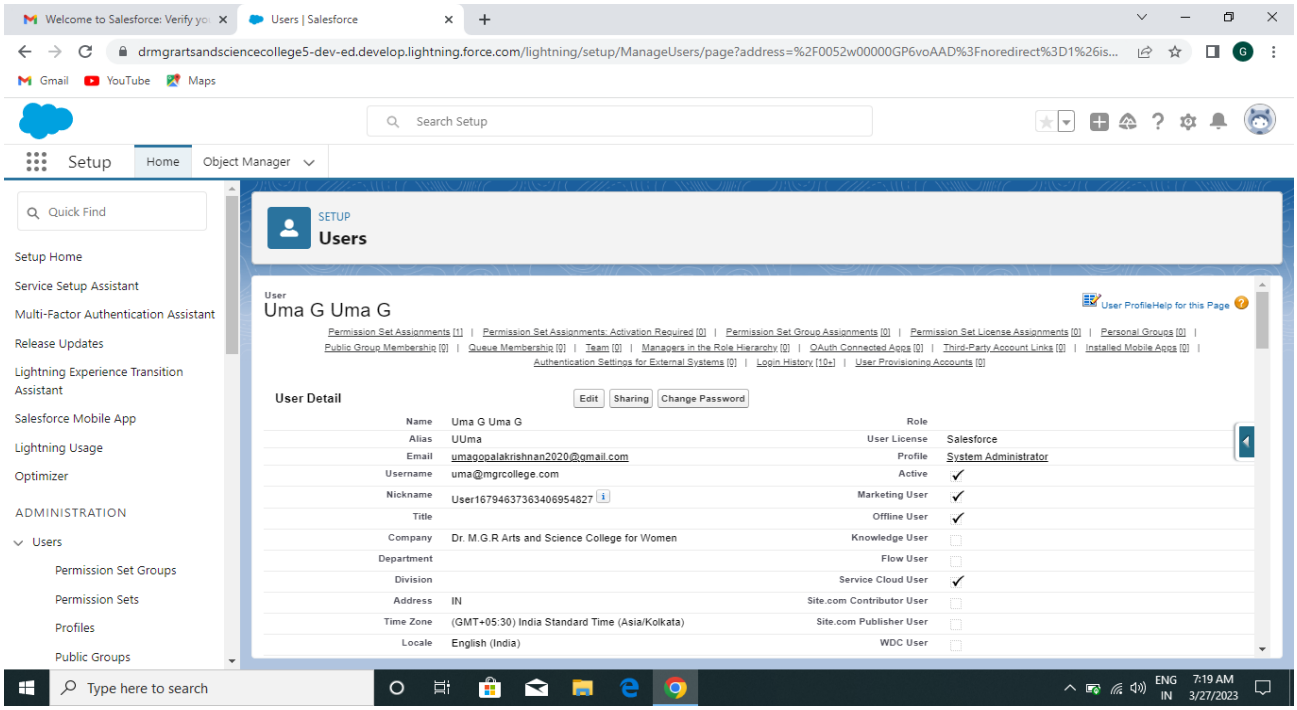
5:31 AM
3/25/2023

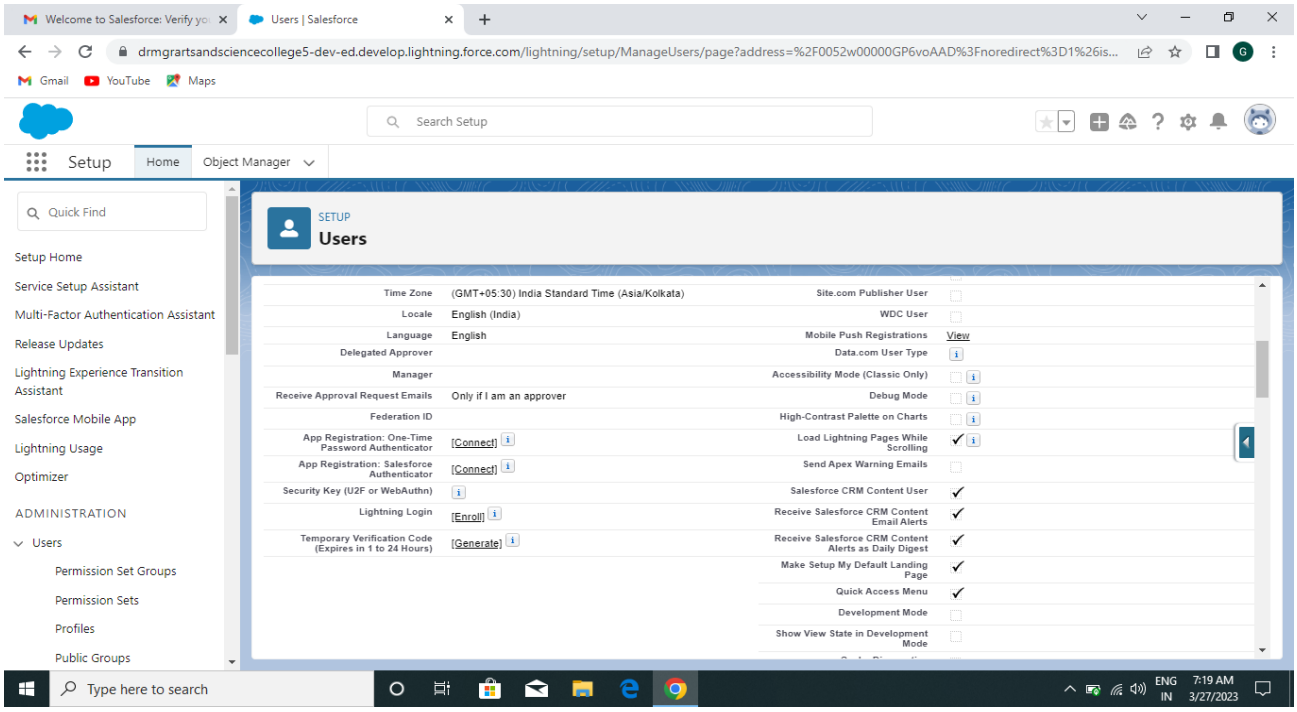
4. To Add Navigation Items:
   Select the items from the search bar and move it using the arrow button → Next.

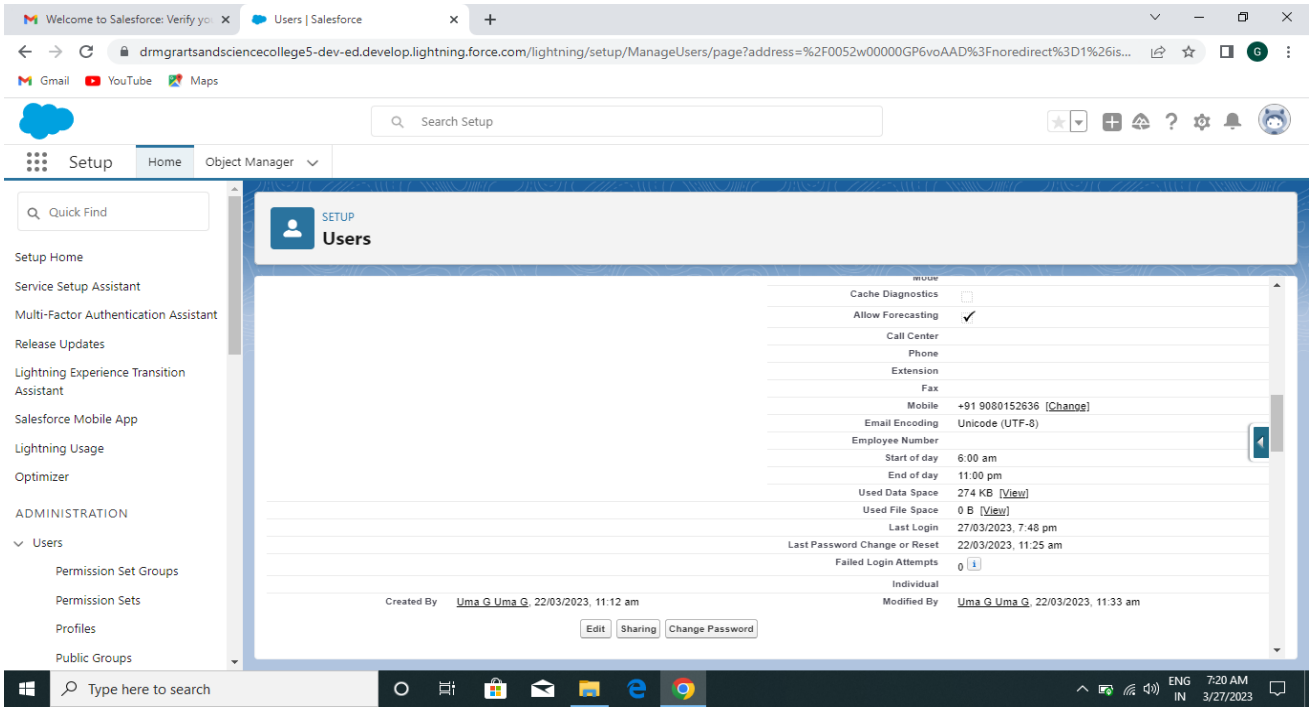
Smart Internz

5. To Add User Profiles:
   Search profiles in search bar → click on the arrow button → save & finish.

OUTPUT:


Welcome to Salesforce: Verify yo
Users | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000GP6voAAD%3Fnoredirect%3D1%26is...
Gmail
YouTube
Maps
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
SETUP
Users
User
Uma G Uma G
User ProfileHelp for this Page
Permission Set Assignments [1] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Connected Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [10+] | User Provisioning Accounts [0]
User Detail
Edit
Sharing
Change Password
Name
Uma G Uma G
Role
Alias
UUma
User License
Salesforce
Email
umagopalakrishnan2020@gmail.com
Profile
System Administrator
Username
uma@mgrcollege.com
Active
Nickname
User16794637363406954827
Marketing User
Title
Offline User
Company
Dr. M.G.R Arts and Science College for Women
Knowledge User
Department
Flow User
Division
Service Cloud User
Address
IN
Site.com Contributor User
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Site.com Publisher User
Locale
English (India)
WDC User
Type here to search
ENG
IN
7:19 AM
3/27/2023


Welcome to Salesforce: Verify yo
Users | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000GP6voAAD%3Fnoredirect%3D1%26is...
Gmail
YouTube
Maps
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
SETUP
Users
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Site.com Publisher User
Locale
English (India)
WDC User
Language
English
Mobile Push Registrations
View
Delegated Approver
Data.com User Type
Manager
Accessibility Mode (Classic Only)
Receive Approval Request Emails
Only if I am an approver
Debug Mode
Federation ID
High-Contrast Palette on Charts
App Registration: One-Time Password Authenticator
[Connect]
Load Lightning Pages While Scrolling
App Registration: Salesforce Authenticator
[Connect]
Send Apex Warning Emails
Security Key (U2F or WebAuthn)
Salesforce CRM Content User
Lightning Login
[Enroll]
Receive Salesforce CRM Content Email Alerts
Temporary Verification Code (Expires in 1 to 24 Hours)
[Generate]
Receive Salesforce CRM Content Alerts as Daily Digest
Make Setup My Default Landing Page
Quick Access Menu
Development Mode
Show View State in Development Mode
Type here to search
ENG
IN
7:19 AM
3/27/2023

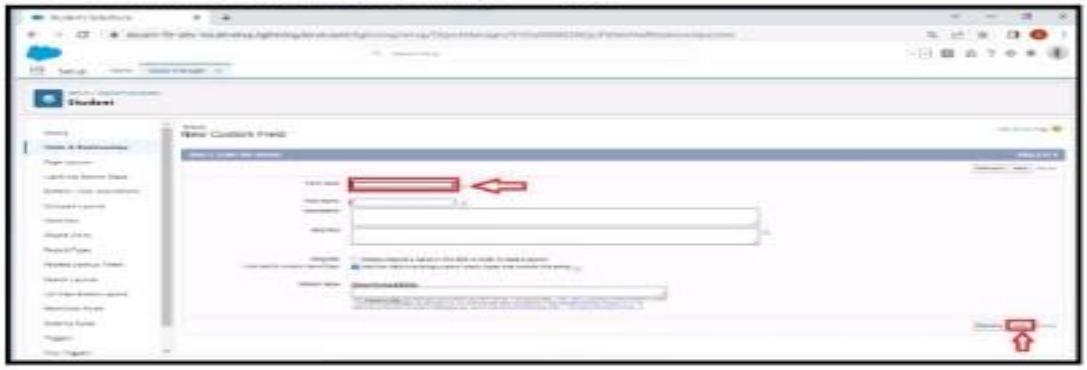


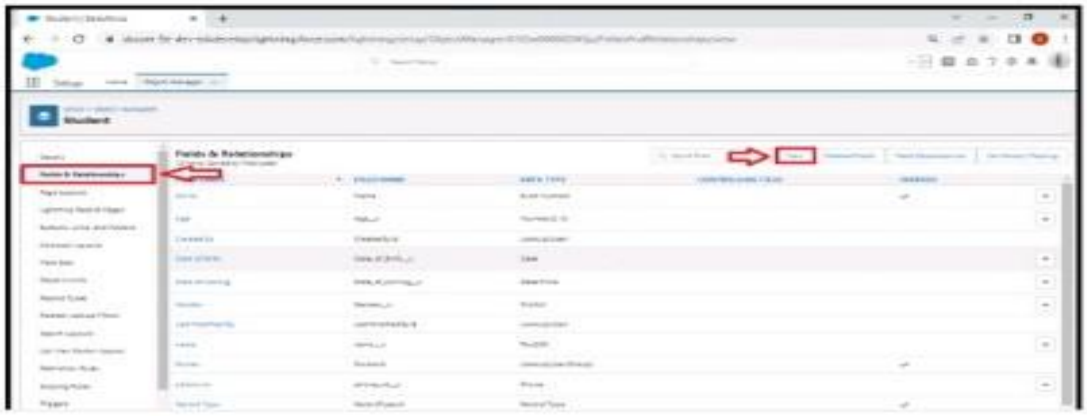
MILESTONE 5- FIELDS

Create the Lead Field

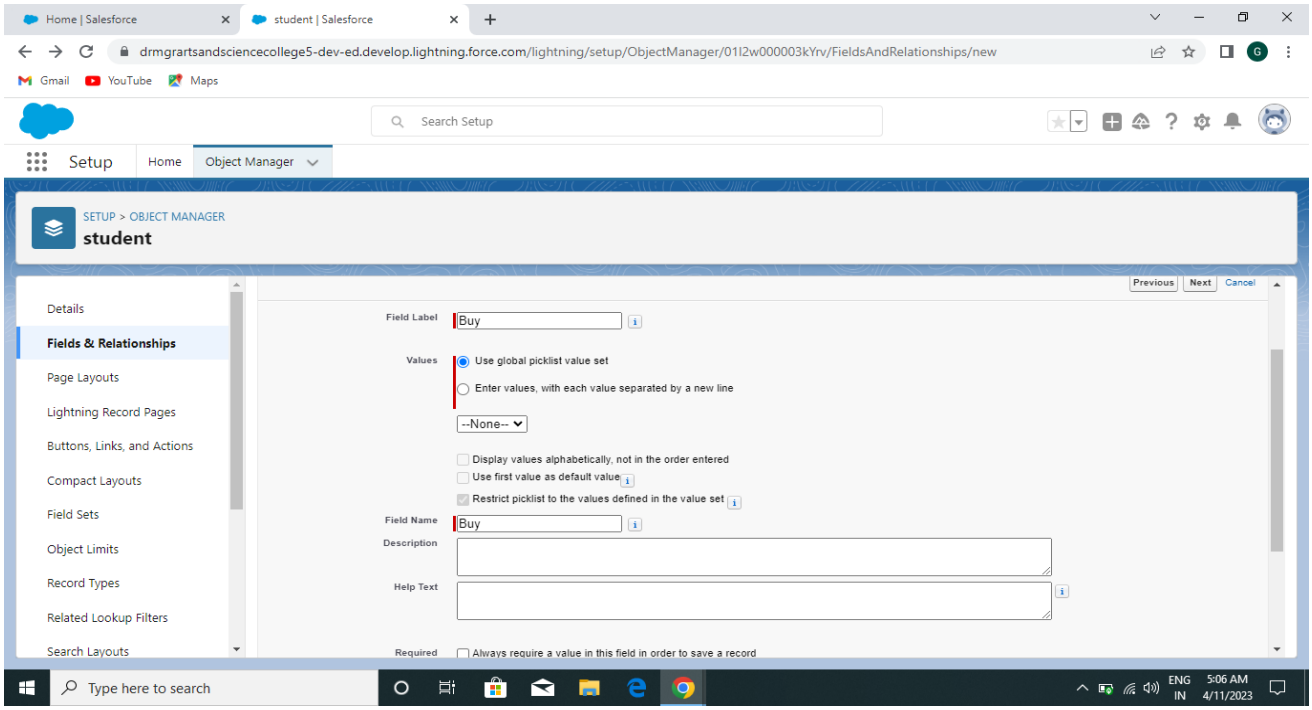
1. Go to setup → click on Object Manager → type object name in search bar → click on the object

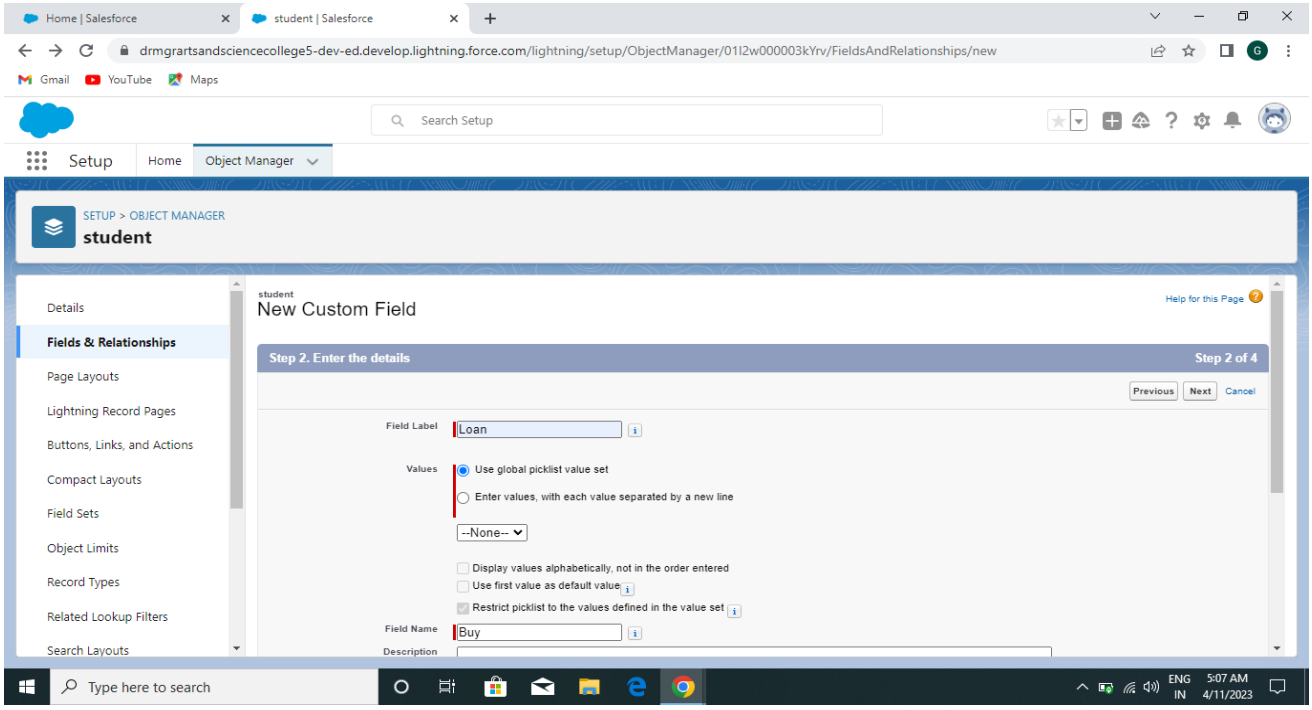
2. Now click on "Fields & Relationships " → New.

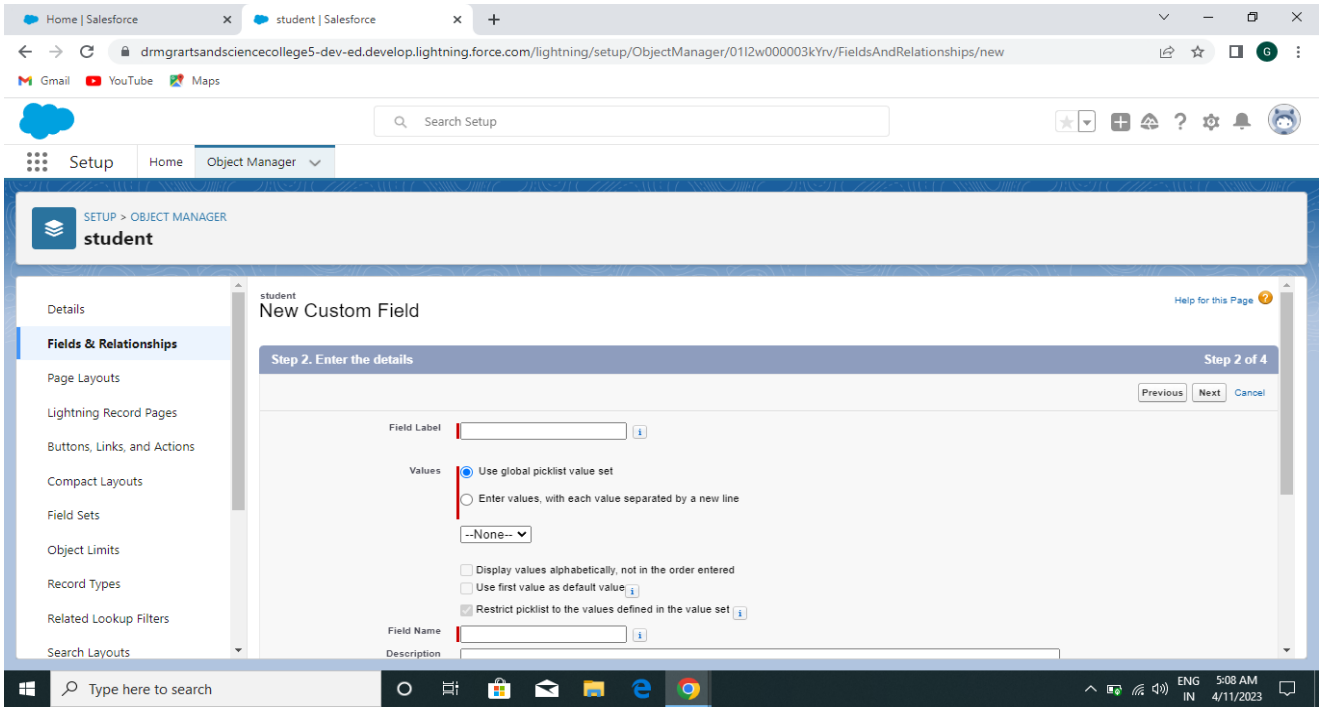




OUTPUT:

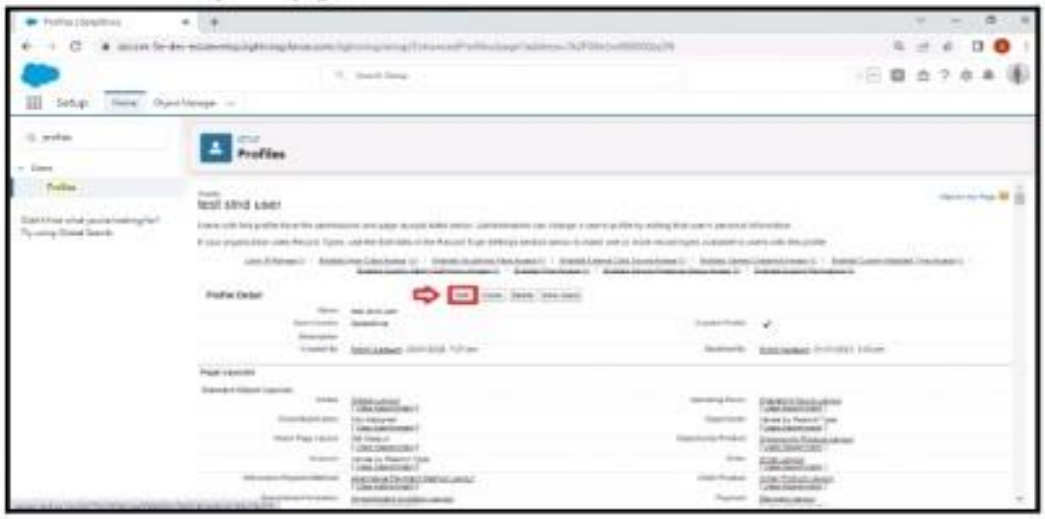

Home | Salesforce
student | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kYrv/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Previous
Next
Cancel
Field Label
Buy
Values
Use global picklist value set
Enter values, with each value separated by a new line
--None--
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Buy
Description
Help Text
Required
Always require a value in this field in order to save a record
Type here to search
ENG
IN
5:06 AM
4/11/2023


Home | Salesforce
student | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kYrv/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
student
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
student
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Loan
Values
Use global picklist value set
Enter values, with each value separated by a new line
--None--
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Buy
Description
Type here to search
ENG
IN
5:07 AM
4/11/2023

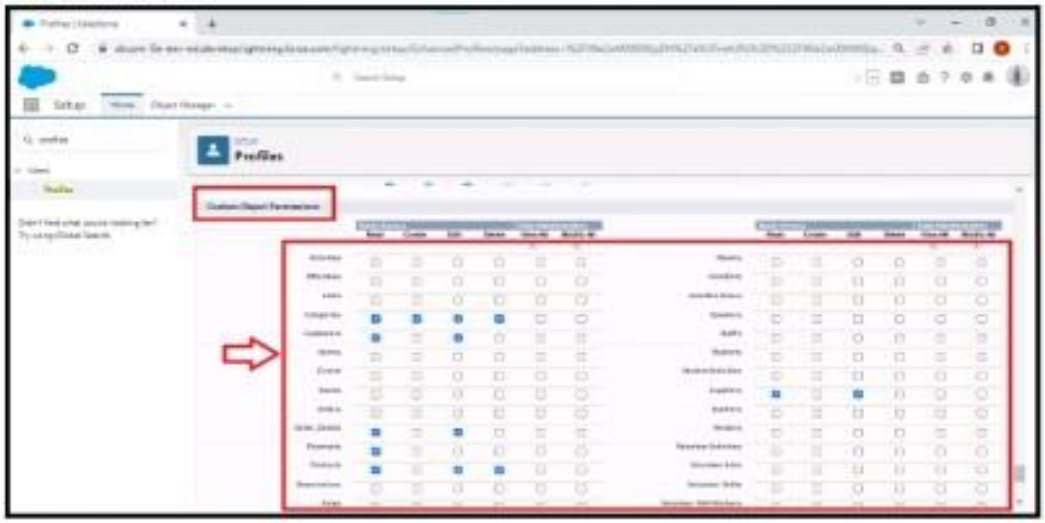

Home | Salesforce
student | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kYrv/FieldsAndRelationships/new
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
student
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Values
Use global picklist value set
Enter values, with each value separated by a new line
--None--
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Description
Type here to search
ENG
IN
5:08 AM
4/11/2023

MILESTONE 6- PROFILE

4. While still on the profile page, then click Edit.

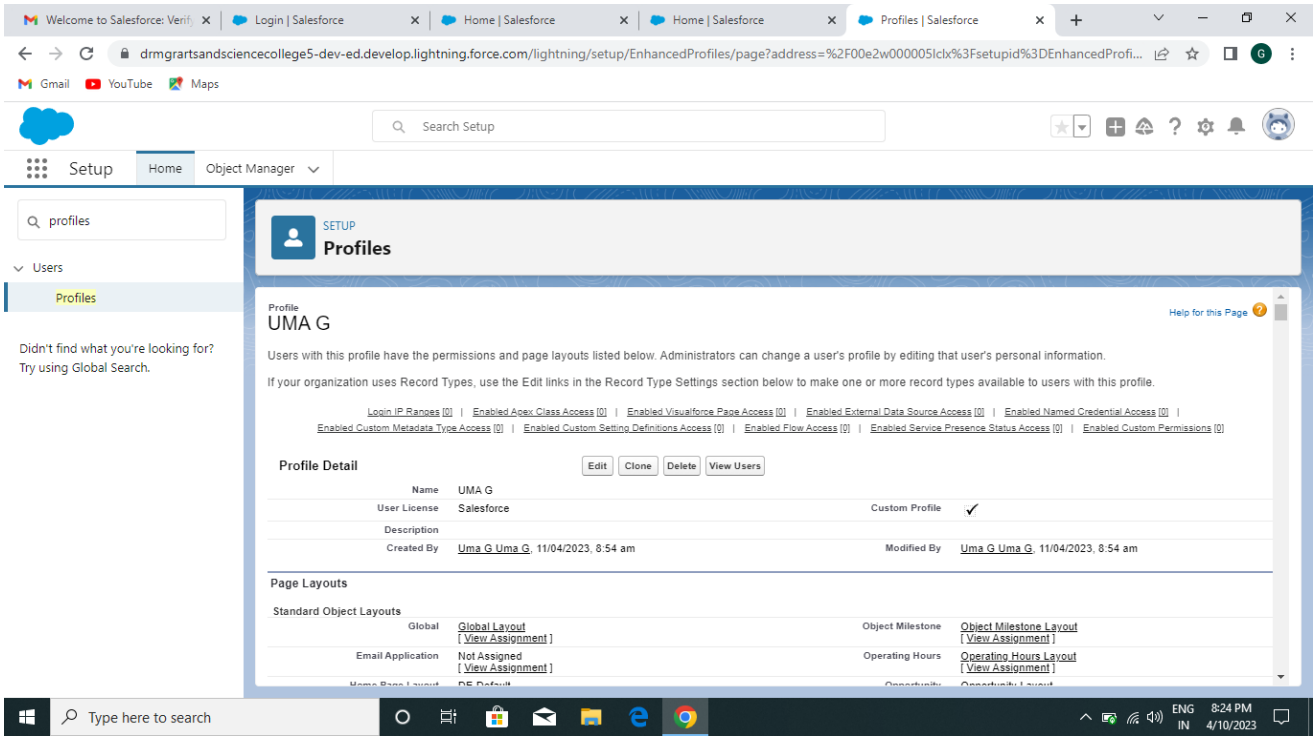


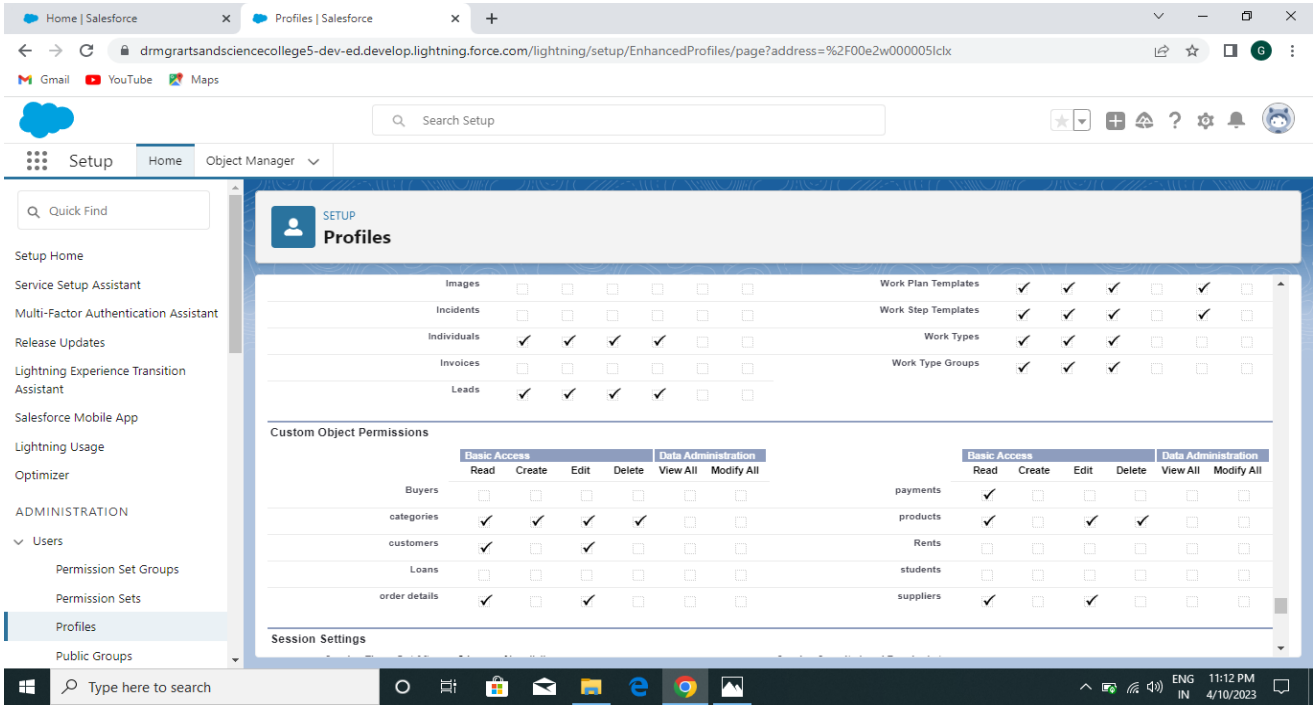
5. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile

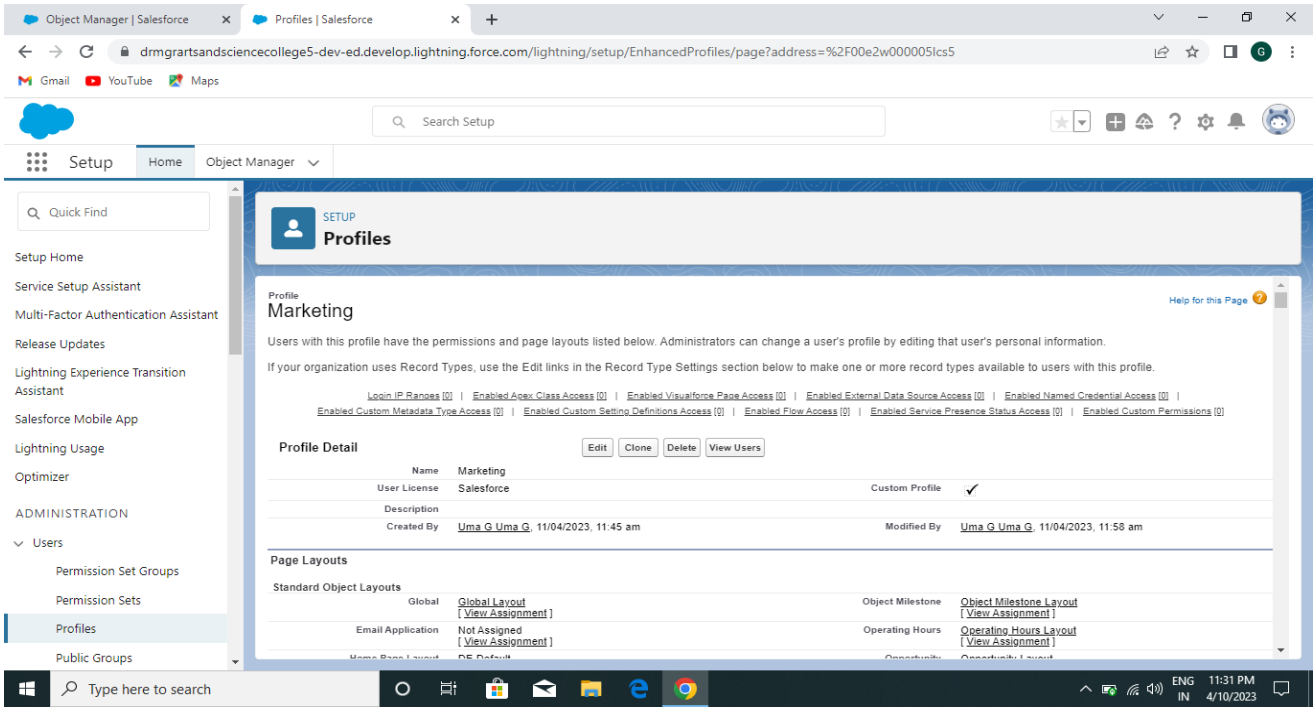


6. Sales Manager →Standard user Profile , Marketing Executive1 and Executive2→Standard Platform User,Marketing Manager→Standard Platform User For

OUTPUT:


Welcome to Salesforce: Verif
Login | Salesforce
Home | Salesforce
Home | Salesforce
Profiles | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005lclx%3Fsetupid%3DEnhancedProfi...
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile
UMA G
Help for this Page
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 [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] |
Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]
Profile Detail
Edit
Clone
Delete
View Users
Name
UMA G
User License
Salesforce
Custom Profile
Description
Created By
Uma G Uma G, 11/04/2023, 8:54 am
Modified By
Uma G Uma G, 11/04/2023, 8:54 am
Page Layouts
Standard Object Layouts
Global
Global Layout
[View Assignment]
Object Milestone
Object Milestone Layout
[View Assignment]
Email Application
Not Assigned
[View Assignment]
Operating Hours
Operating Hours Layout
[View Assignment]
Type here to search
ENG
IN
8:24 PM
4/10/2023


Home | Salesforce
Profiles | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005lclx
Gmail
YouTube
Maps
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
SETUP
Profiles
Images
Incidents
Individuals
Invoices
Leads
Work Plan Templates
Work Step Templates
Work Types
Work Type Groups
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Buyers
categories
customers
Loans
order details
payments
products
Rents
students
suppliers
Session Settings
Type here to search
ENG
IN
11:12 PM
4/10/2023


Object Manager | Salesforce
Profiles | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005lcs5
Gmail
YouTube
Maps
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
SETUP
Profiles
Profile
Marketing
Help for this Page
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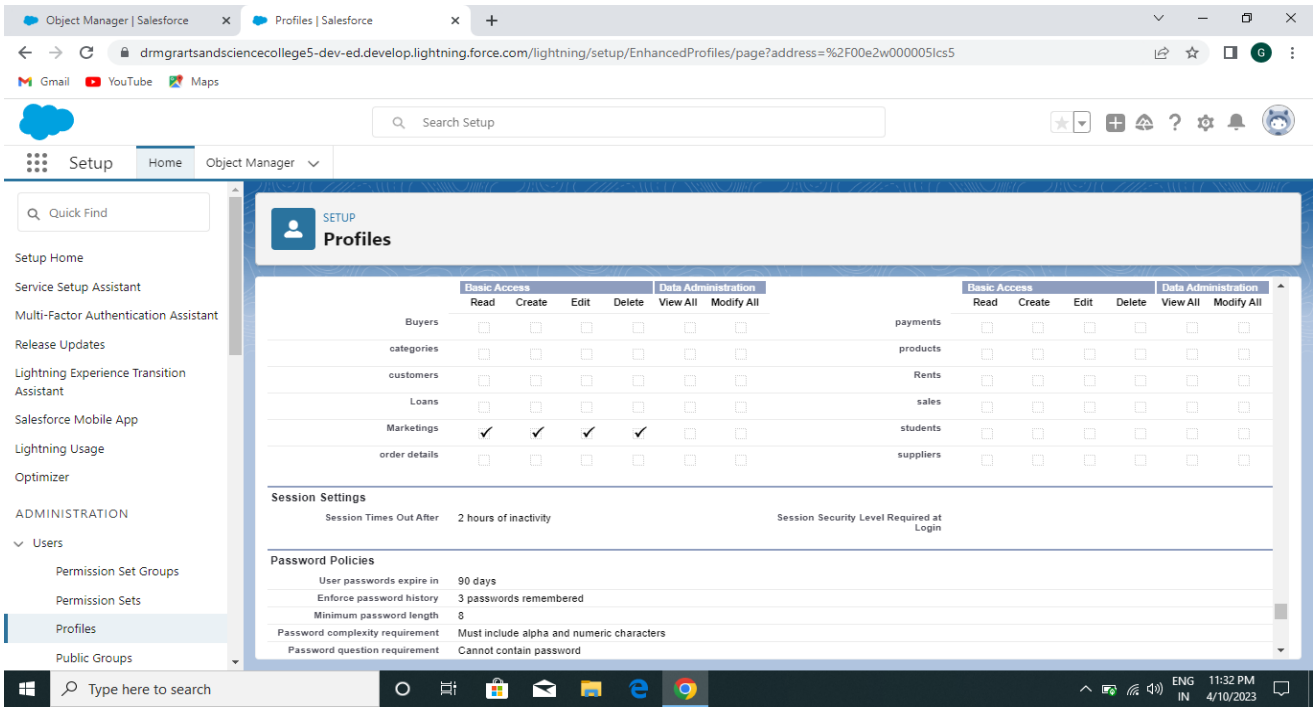
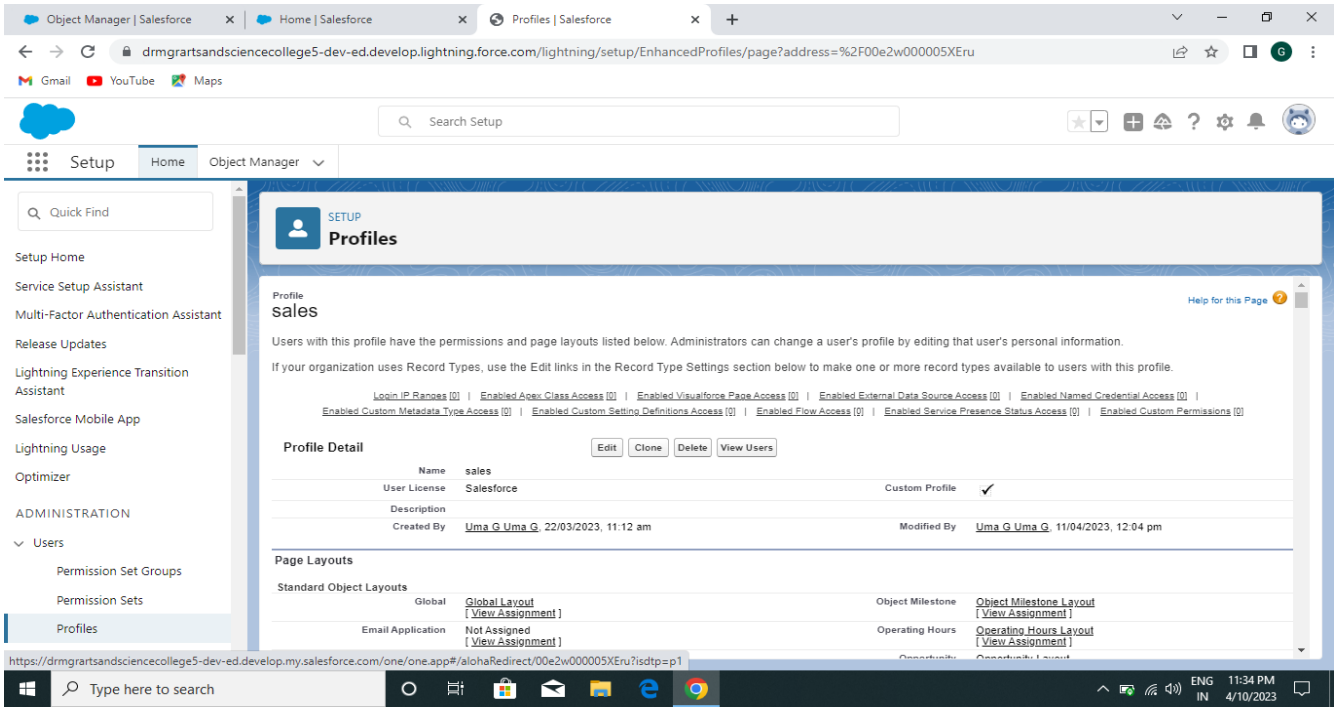
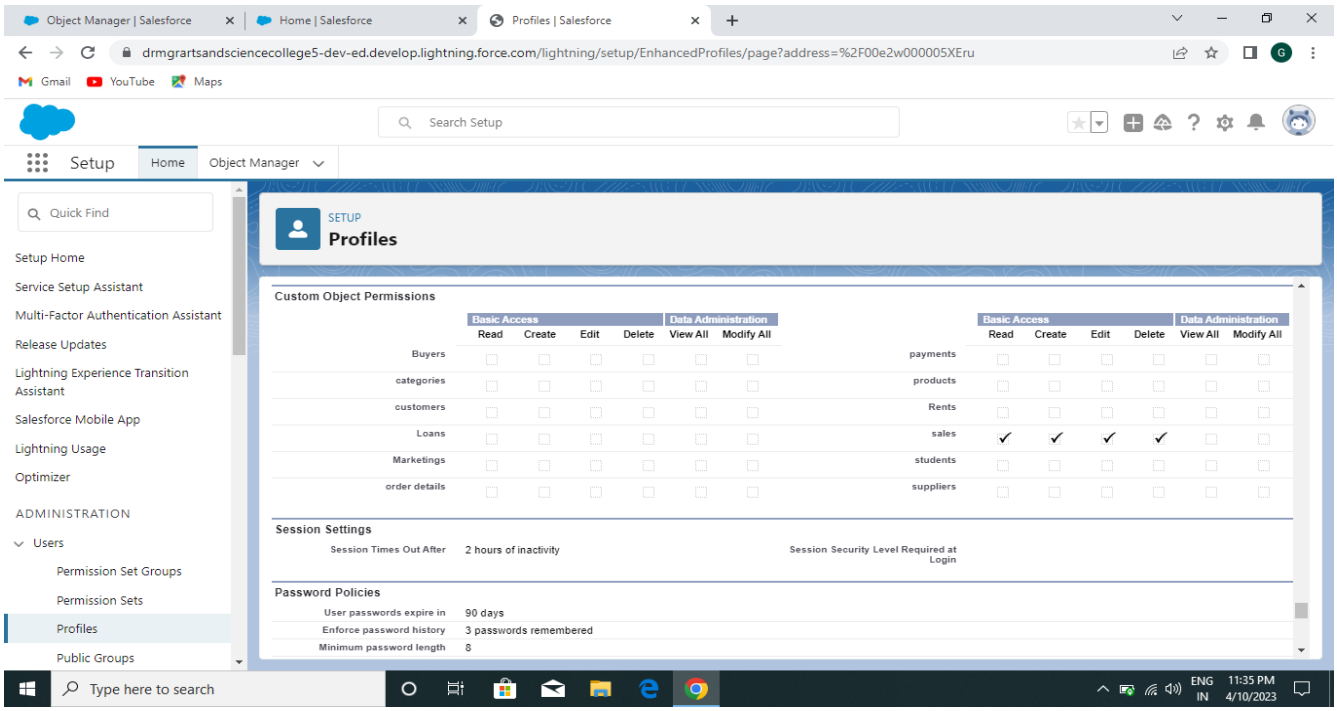
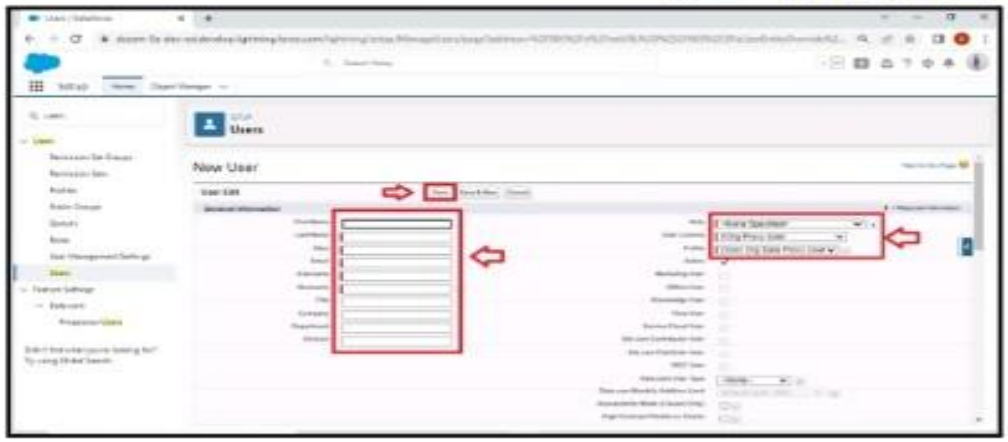
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]
Profile Detail
Edit
Clone
Delete
View Users
Name
Marketing
User License
Salesforce
Custom Profile
Description
Created By
Uma G Uma G, 11/04/2023, 11:45 am
Modified By
Uma G Uma G, 11/04/2023, 11:58 am
Page Layouts
Standard Object Layouts
Global
Global Layout
[View Assignment]
Object Milestone
Object Milestone Layout
[View Assignment]
Email Application
Not Assigned
[View Assignment]
Operating Hours
Operating Hours Layout
[View Assignment]
Type here to search
ENG
IN
11:31 PM
4/10/2023


Object Manager | Salesforce
Profiles | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005lcs5
Gmail
YouTube
Maps
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
SETUP
Profiles
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Buyers
categories
customers
Loans
Marketings
order details
payments
products
Rents
sales
students
suppliers
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Type here to search
ENG
IN
11:32 PM
4/10/2023

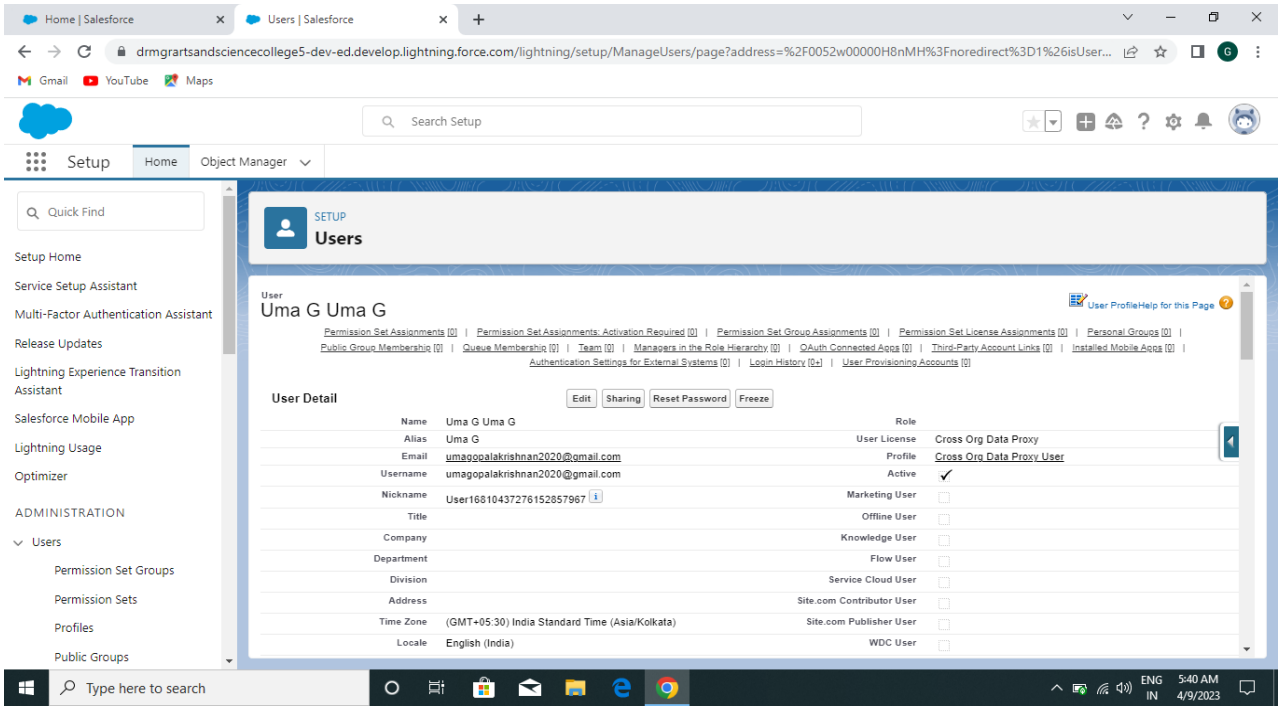

Object Manager | Salesforce
Home | Salesforce
Profiles | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005XEru
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
SETUP
Profiles
Profile
sales
Help for this Page
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 [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]
Profile Detail
Edit
Clone
Delete
View Users
Name
sales
User License
Salesforce
Custom Profile
Description
Created By
Uma G Uma G, 22/03/2023, 11:12 am
Modified By
Uma G Uma G, 11/04/2023, 12:04 pm
Page Layouts
Standard Object Layouts
Global
Global Layout
[View Assignment]
Object Milestone
Object Milestone Layout
[View Assignment]
Email Application
Not Assigned
[View Assignment]
Operating Hours
Operating Hours Layout
[View Assignment]
https://drmgrartsandsciencecollege5-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/00e2w000005XEru?isdtp=p1
Type here to search
ENG
IN
11:34 PM
4/10/2023

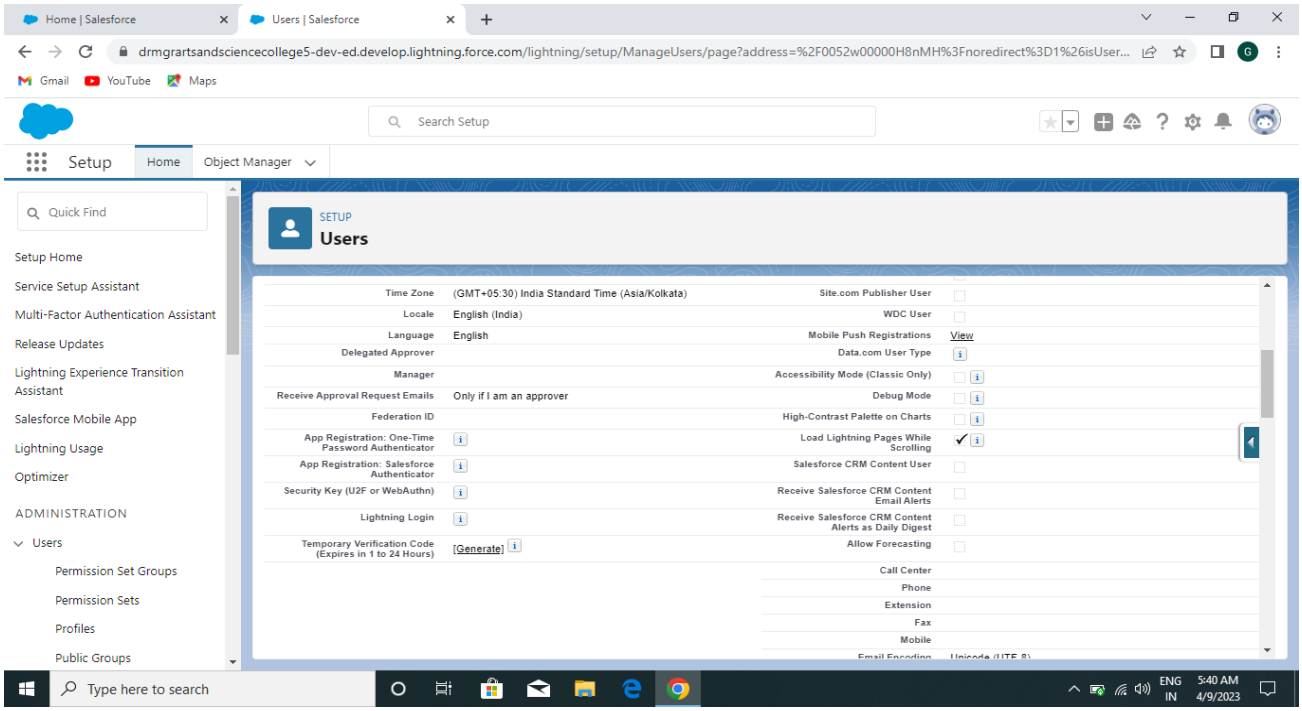

Object Manager | Salesforce
Home | Salesforce
Profiles | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000005XEru
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
SETUP
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Buyers
categories
customers
Loans
Marketings
order details
payments
products
Rents
sales
students
suppliers
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Type here to search
ENG
IN
11:35 PM
4/10/2023

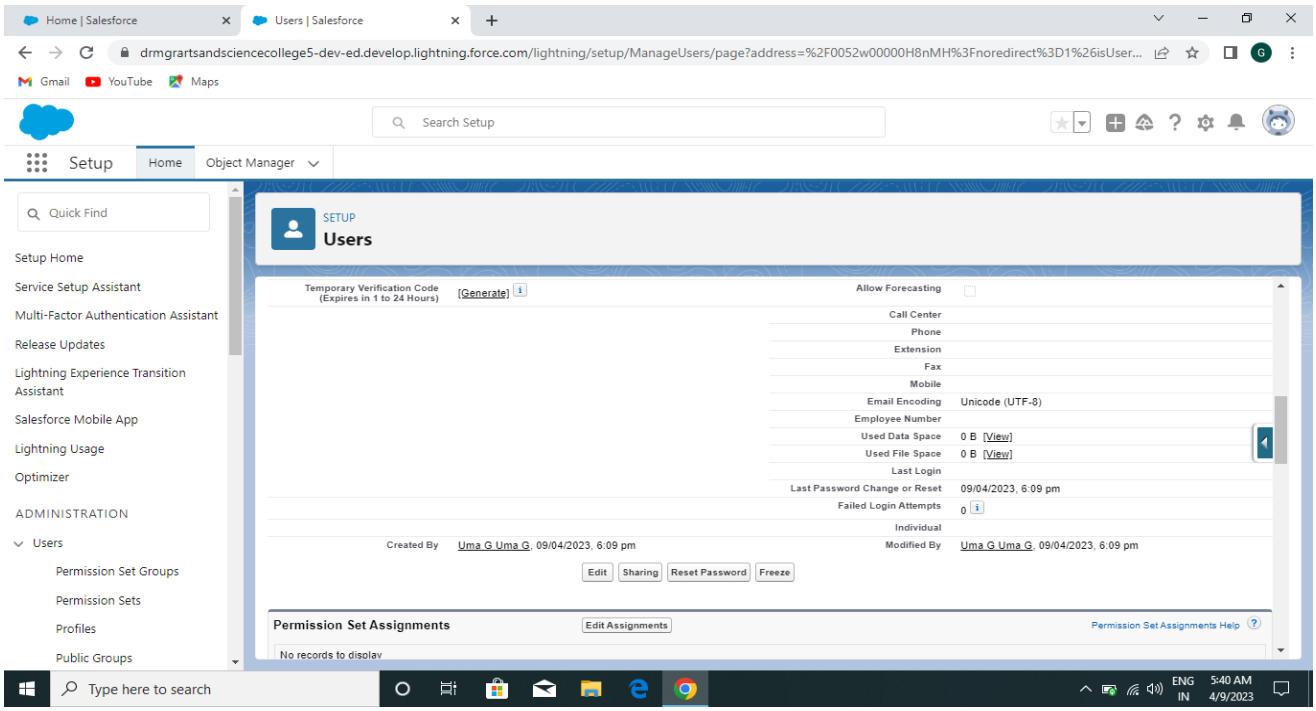
MILESTONE 7- NEW USER



OUTPUT:




Home | Salesforce
Users | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000H8nMH%3Fnoredirect%3D1%26isUser...
Gmail
YouTube
Maps
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
SETUP
Users
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
Federation ID
App Registration: One-Time Password Authenticator
App Registration: Salesforce Authenticator
Security Key (U2F or WebAuthn)
Lightning Login
Temporary Verification Code (Expires in 1 to 24 Hours)
[Generate]
Site.com Publisher User
WDC User
Mobile Push Registrations
View
Data.com User Type
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Salesforce CRM Content User
Receive Salesforce CRM Content Email Alerts
Receive Salesforce CRM Content Alerts as Daily Digest
Allow Forecasting
Call Center
Phone
Extension
Fax
Mobile
Email Encoding
Unicode (UTF-8)
Type here to search
ENG
IN
5:40 AM
4/9/2023


Home | Salesforce
Users | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000H8nMH%3Fnoredirect%3D1%26isUser...
Gmail
YouTube
Maps
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
Permission Set Groups
Permission Sets
Profiles
Public Groups
SETUP
Users
Temporary Verification Code (Expires in 1 to 24 Hours)
[Generate]
Allow Forecasting
Call Center
Phone
Extension
Fax
Mobile
Email Encoding
Unicode (UTF-8)
Employee Number
Used Data Space
0 B [View]
Used File Space
0 B [View]
Last Login
Last Password Change or Reset
09/04/2023, 6:09 pm
Failed Login Attempts
0
Individual
Created By
Uma G Uma G, 09/04/2023, 6:09 pm
Modified By
Uma G Uma G, 09/04/2023, 6:09 pm
Edit
Sharing
Reset Password
Freeze
Permission Set Assignments
Edit Assignments
Permission Set Assignments Help
No records to display
Type here to search
ENG
IN
5:40 AM
4/9/2023

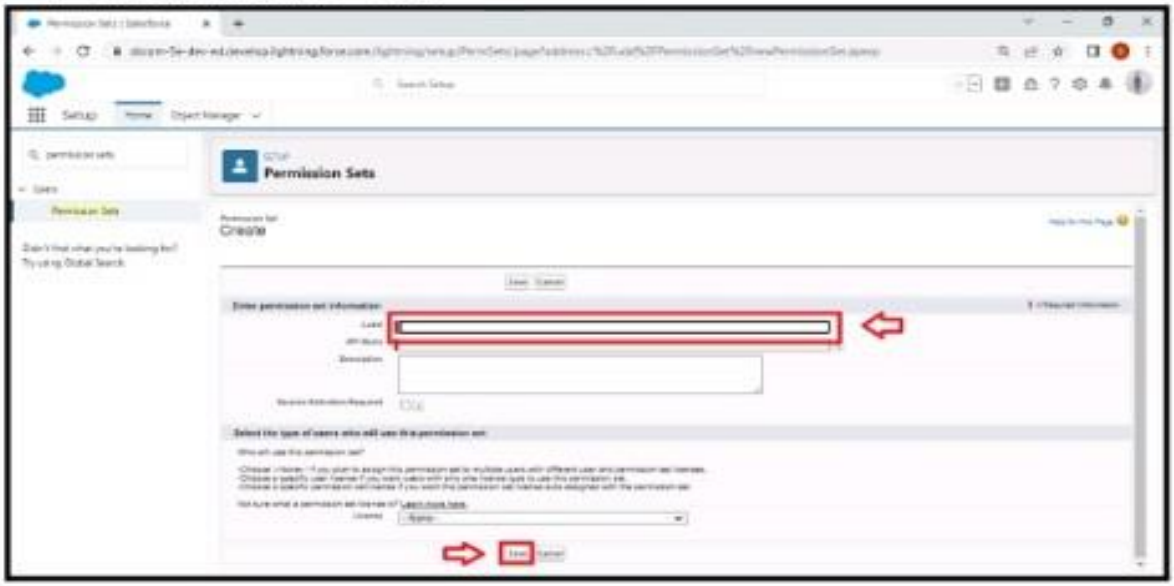
MILESTONE 8- PERMISSION SET

Activity 1:

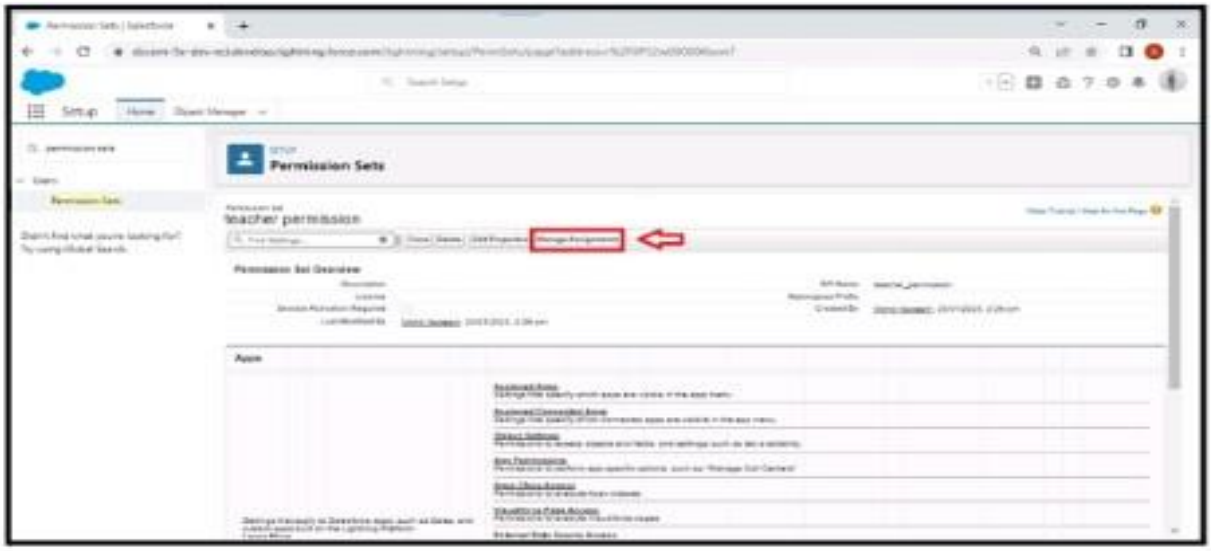
Create the Permission Sets

1. Go to setup → type "permission sets" in quick search → select permission sets → New.

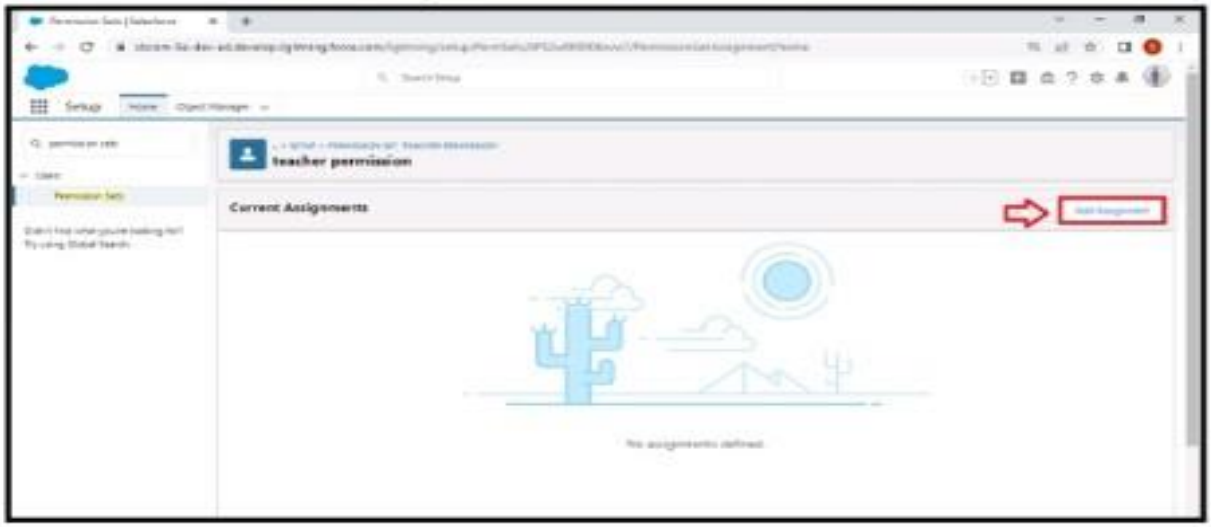
2. Enter the label name → save.



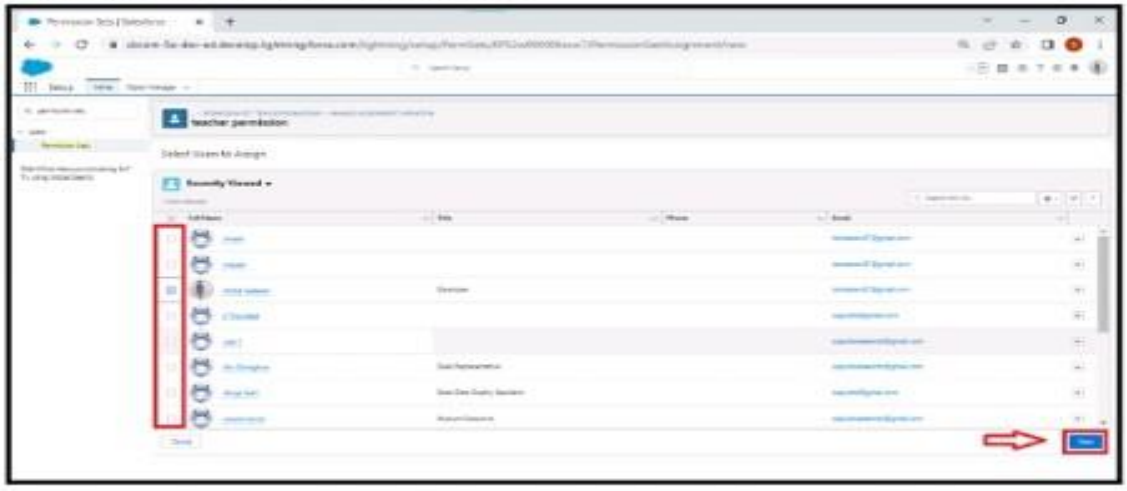
3. After saving the permission click on the Manage assignment



4. Now click on the Add Assignment

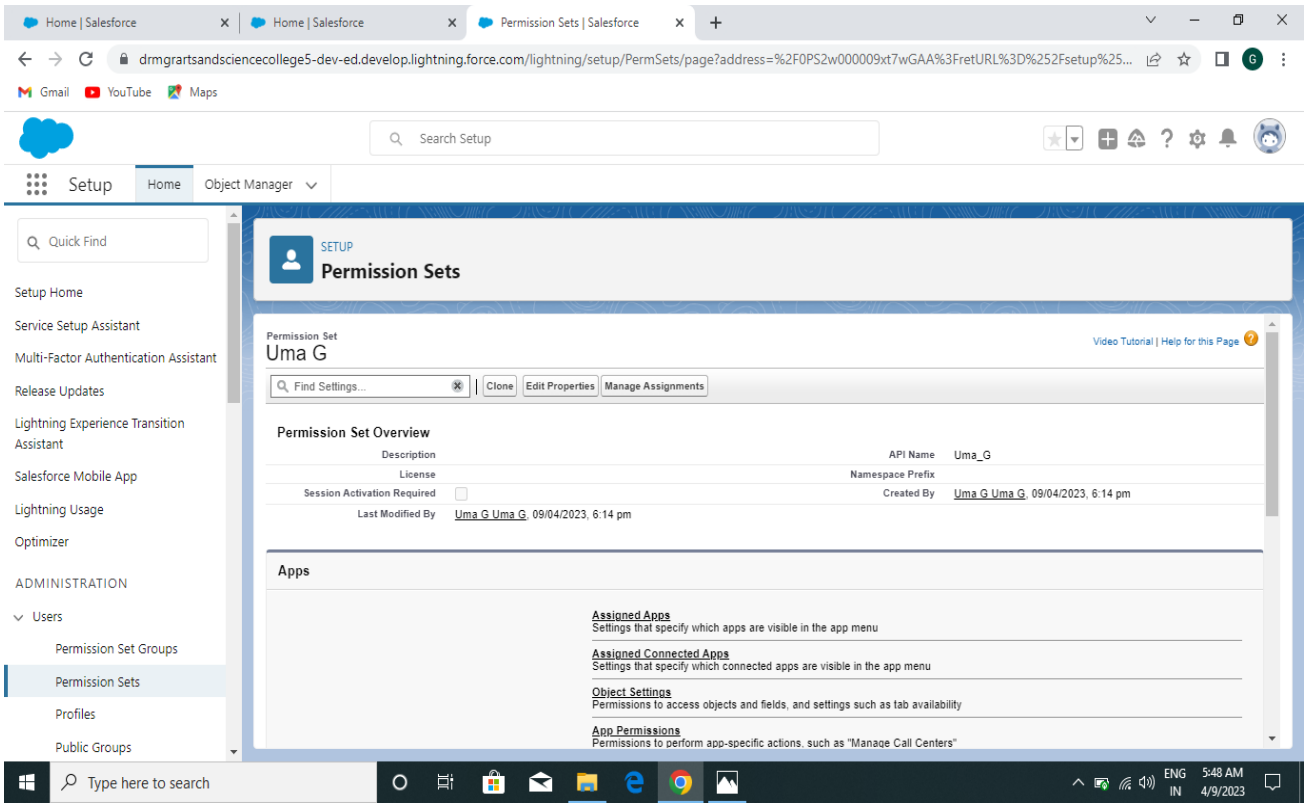


5. Now select the users and click on save



6. Go to permission set and add the access For Sales Rep3 give Access with Create permission for the User

OUTPUT:

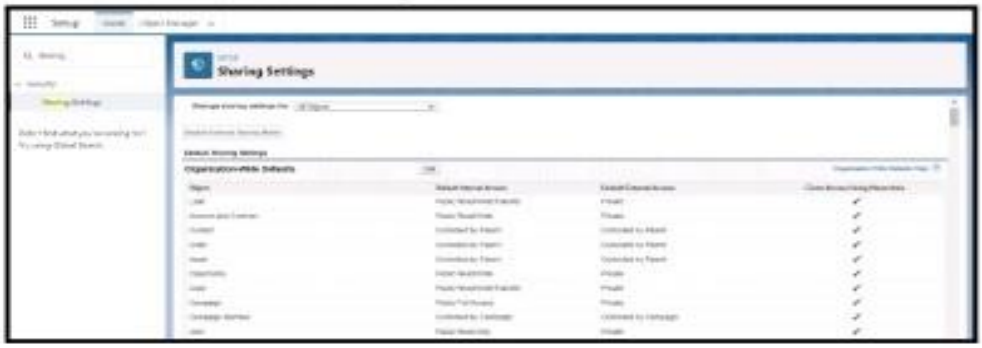


MILESTONE 9- SETUP FOR OWD

Activity1:

Create OWD Setting

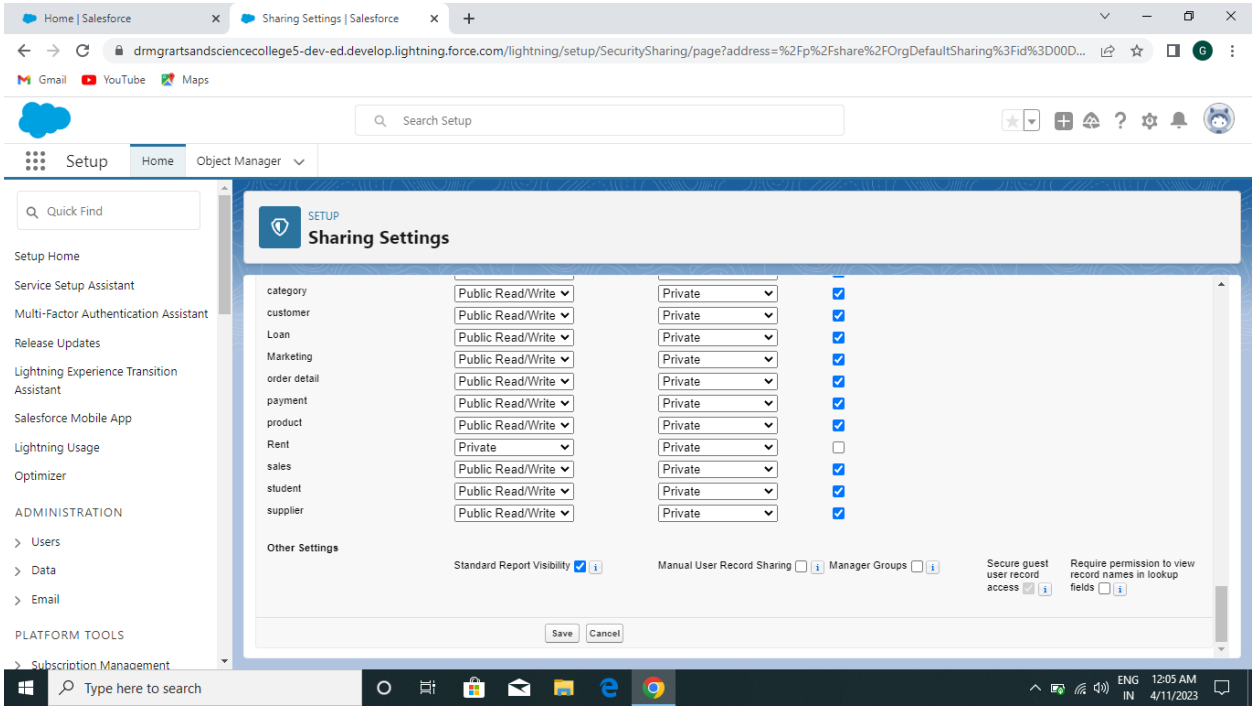
1. Setup, use the Quick Find box to find Sharing Settings.
2. Click Edit in the Organization-Wide Defaults area.
3. For each object, select the default access you want to give everyone.
4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for **Lead, Rent** custom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

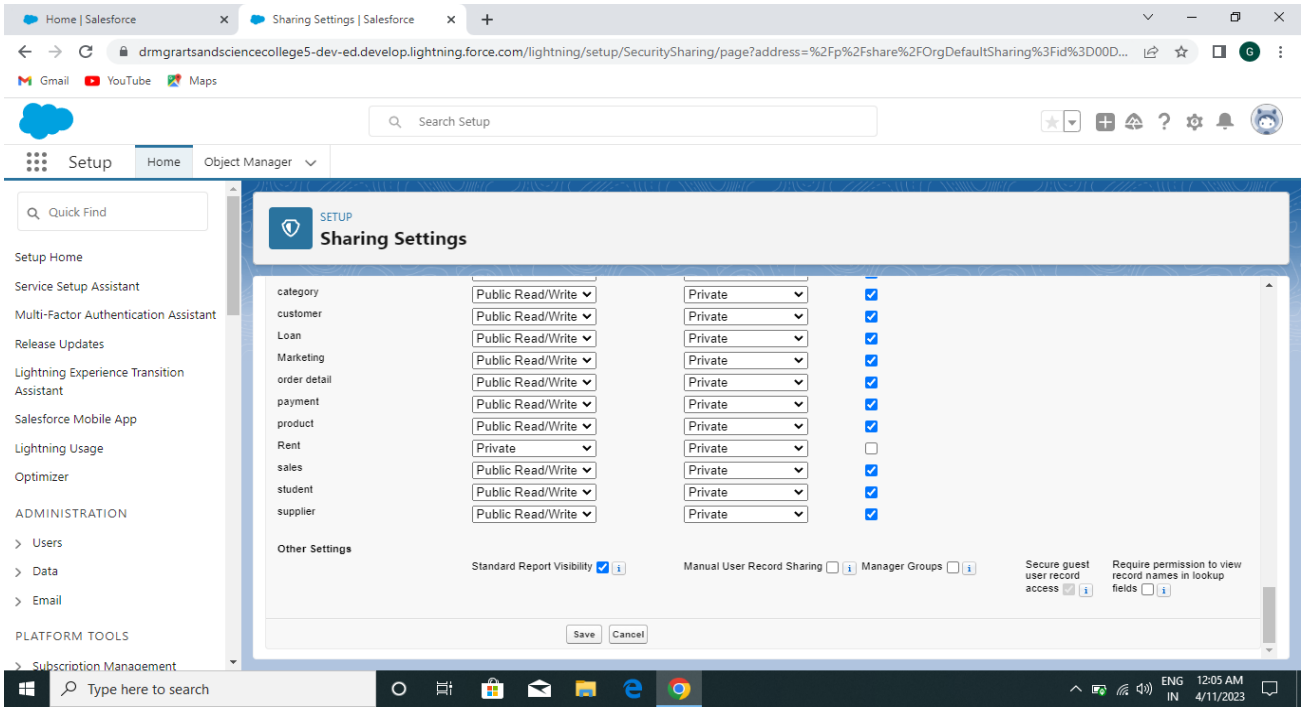


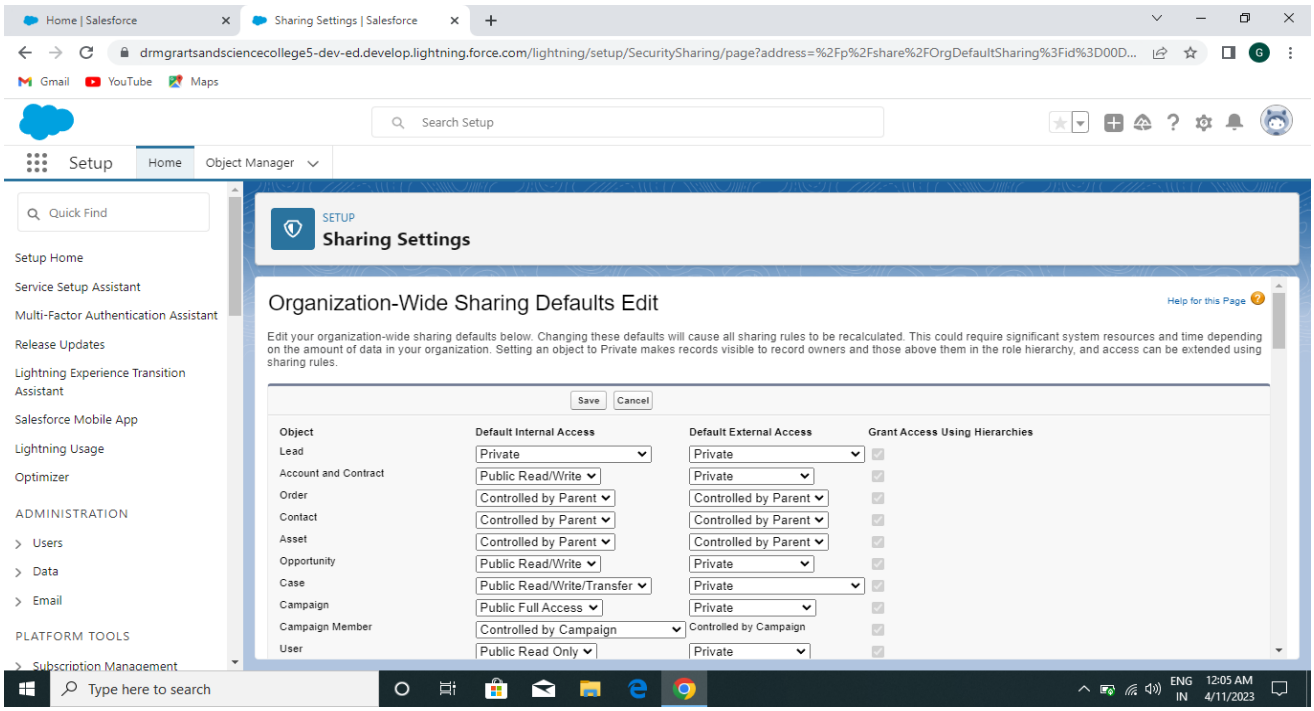
5. Click Edit and from the Drop Down select private for internal and external

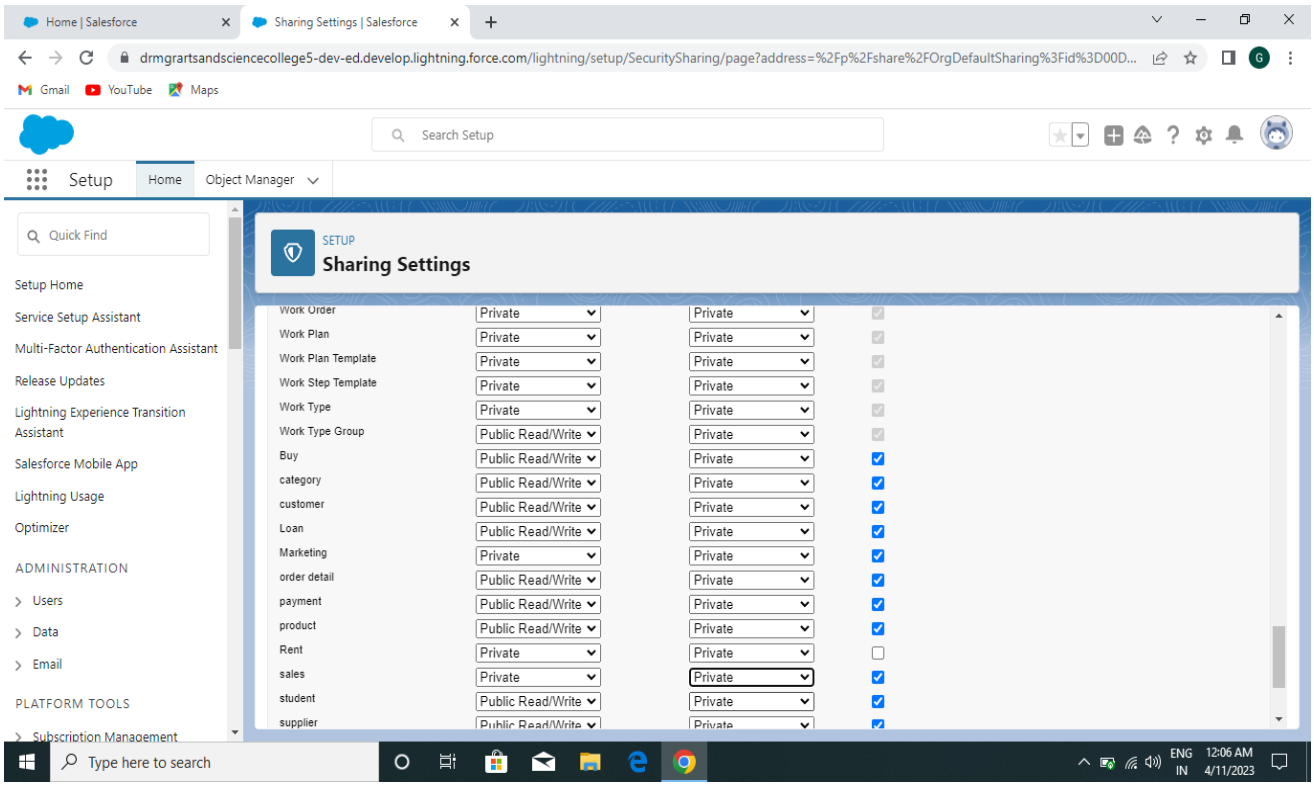
6. This Setting is for all the User Which have been Created

OUTPUT:


Home | Salesforce
Sharing Settings | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fshare%2FOrgDefaultSharing%3Fid%3D00D...
Gmail
YouTube
Maps
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
SETUP
Sharing Settings
category Public Read/Write Private
customer Public Read/Write Private
Loan Public Read/Write Private
Marketing Public Read/Write Private
order detail Public Read/Write Private
payment Public Read/Write Private
product Public Read/Write Private
Rent Private Private
sales Public Read/Write Private
student Public Read/Write Private
supplier Public Read/Write Private
Other Settings
Standard Report Visibility
Manual User Record Sharing
Manager Groups
Secure guest user record access
Require permission to view record names in lookup fields
Save
Cancel
Type here to search
ENG IN
12:05 AM 4/11/2023

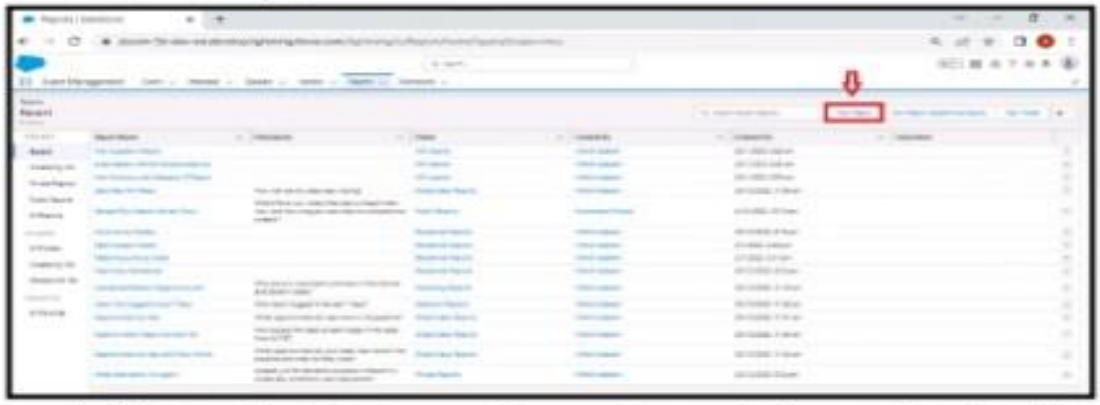

Home | Salesforce
Sharing Settings | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fshare%2FOrgDefaultSharing%3Fid%3D00D...
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
SETUP
Sharing Settings
category Public Read/Write Private
customer Public Read/Write Private
Loan Public Read/Write Private
Marketing Public Read/Write Private
order detail Public Read/Write Private
payment Public Read/Write Private
product Public Read/Write Private
Rent Private Private
sales Public Read/Write Private
student Public Read/Write Private
supplier Public Read/Write Private
Other Settings
Standard Report Visibility
Manual User Record Sharing
Manager Groups
Secure guest user record access
Require permission to view record names in lookup fields
Save
Cancel
Type here to search
ENG IN
12:05 AM 4/11/2023


Home | Salesforce
Sharing Settings | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fshare%2FOrgDefaultSharing%3Fid%3D00D...
Gmail
YouTube
Maps
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
SETUP
Sharing Settings
Organization-Wide Sharing Defaults Edit
Help for this Page
Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.
Save
Cancel
Object
Default Internal Access
Default External Access
Grant Access Using Hierarchies
Lead
Private
Private
Account and Contract
Public Read/Write
Private
Order
Controlled by Parent
Controlled by Parent
Contact
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
User
Public Read Only
Private
Type here to search
ENG
IN
12:05 AM
4/11/2023

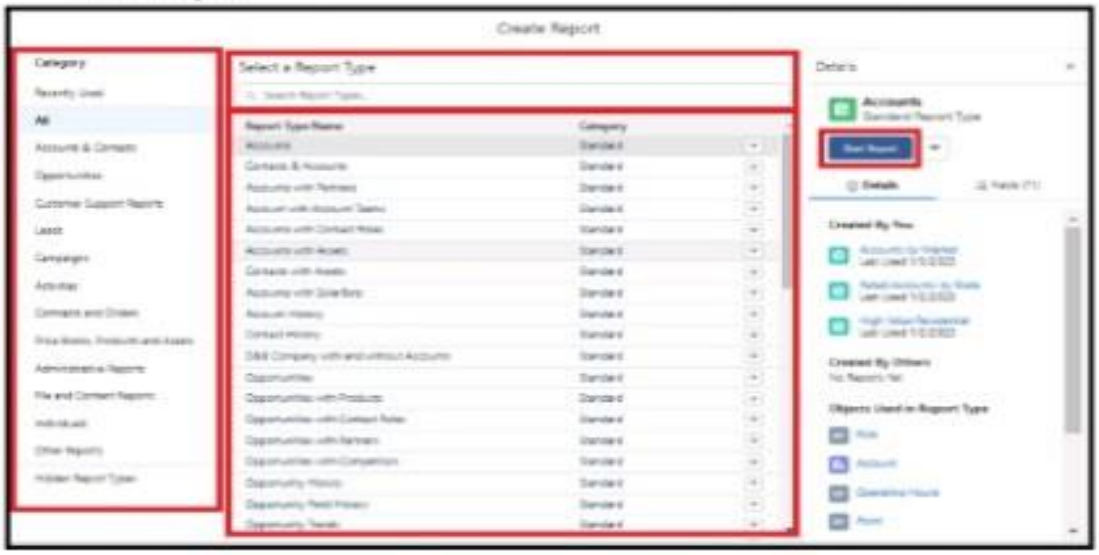

Home | Salesforce
Sharing Settings | Salesforce
drmgrartsandsciencecollege5-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fshare%2FOrgDefaultSharing%3Fid%3D00D...
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
SETUP
Sharing Settings
Work Order
Private
Private
Work Plan
Private
Private
Work Plan Template
Private
Private
Work Step Template
Private
Private
Work Type
Private
Private
Work Type Group
Public Read/Write
Private
Buy
Public Read/Write
Private
category
Public Read/Write
Private
customer
Public Read/Write
Private
Loan
Public Read/Write
Private
Marketing
Private
Private
order detail
Public Read/Write
Private
payment
Public Read/Write
Private
product
Public Read/Write
Private
Rent
Private
Private
sales
Private
Private
student
Public Read/Write
Private
supplier
Public Read/Write
Private
Type here to search
ENG
IN
12:06 AM
4/11/2023

MILESTONE 10- REPORT

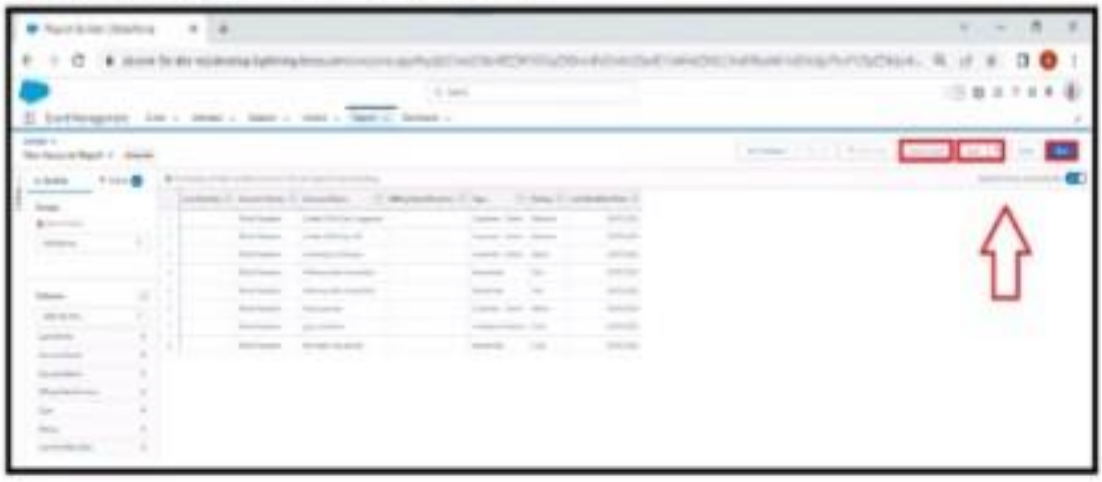
2. Click New Report



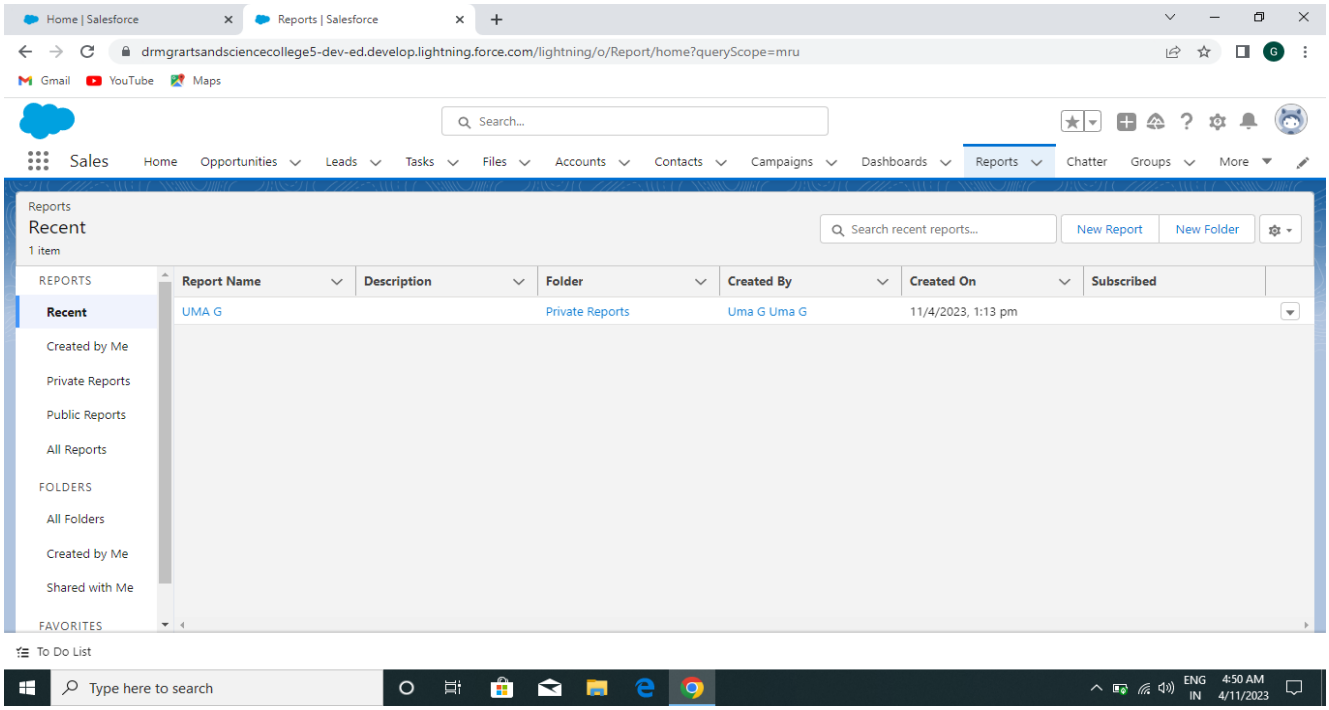
3. Select report type from category or from report type panel or from search panel → click on start report.



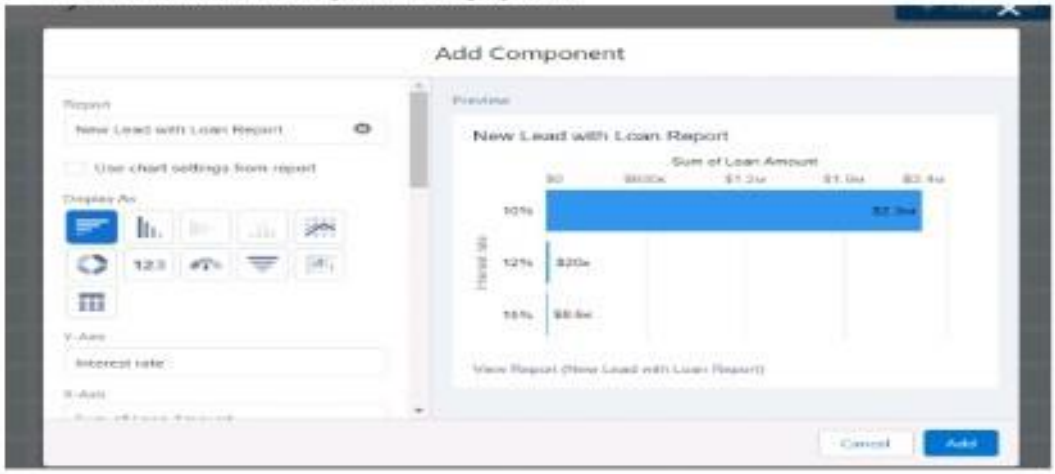
4. Customize your report, then save or run it.



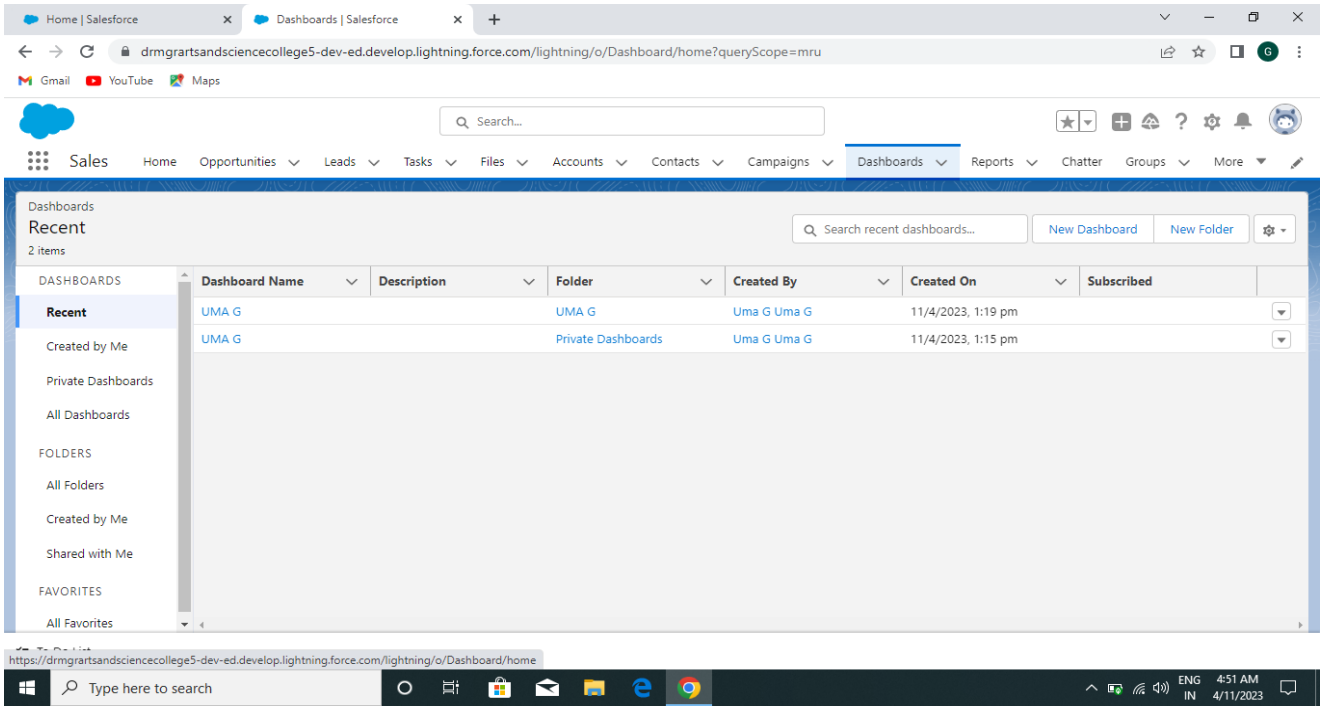
OUTPUT:



4. Select in which format you want display chart



OUTPUT:



TRAILHEAD PROFILE PUBLIC URL:

Team Lead - https://trailblazer.me/id/gopas6

Team Members 1 –https://trailblazer.me/id/ssunita3

Team Members 2 - http://trailblazer.me/id/tmurugan16

Team Members 3 –https://trailblazer.me/id/unnaa

ADVANTAGES OF PROPERTY MANAGEMENT APPLICATION USING SALESFORCE:

1. High quality tenants
2. Less legal problems
3. Shortest periods of vacancy
4. Long –term tenants
5. Increase and maintain the value of your rental property

DISADVANTAGE OF PROPERTY MANAGEMENT APPLICATION USING SALESFORCE:

1. Faster response time
2. Integration of data from multiple channels
3. Effective lead management
4. Enhancing functioning
5. Less time

APPLICATIONS:

1. Easy to handles for all taxes.
2. Easy to collecting the rent.
3. Heavy manufacturing facilities such as automotive plants and steel mills.
4. This is used to commercial and industrial property management.
5. The special purpose of property management are:
    1. Theaters
    2. Sports arenas
    3. Resorts
    4. Places of worship
    5. schools and universities

CONCLUSION:

We can facililate easy communication and ensure that all departments are operating efficiently and effectively.

In the salesforce, the very important think is Customer Relationship Management (CRM).

This is generally a lot of information. Agents have to deal with it all at once. CRM helps them do it more effectively.

FUTURE SCOPE:

Salesforce training would be natural choice, as more and more business are adopting salesforce for their customer relationship management and marketing plans.

To integrate data science and big data capabilities to its service cloud and marketing cloud.

Our goals must be Smart, Measurable, Attainable, Relevant and Time- Based.