



# PROPERTY MANAGEMENT APPLICATION USING SALESFORCE



## NAAN MUDHALVAN PROJECT REPORT

*Submitted by*

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*in*

**INFORMATION TECHNOLOGY**

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## BONAFIDE CERTIFICATE

Certified that this the project report titled "**Property Management Application Using Salesforce**" is the bonafide work of "**DEEPIKA S V (611220205002), RAMYA SRI R (611220205027), SHRI SHALINI M (611220205033) ,TEAJASHREE R (611220205042)**" who carried out the project work under my supervision.

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## LIST OF ABBREVIATION

|      |                                   |
|------|-----------------------------------|
| CRM  | Customer Relationship Management  |
| ESP  | Email Service Provider            |
| UI   | User Interface                    |
| UX   | User Experience                   |
| OWD  | Org - Wide Default                |
| CTA  | Call To Action                    |
| CSV  | Comma - Separated Values          |
| SLA  | Service Level Agreement           |
| API  | Application Programming Interface |
| SaaS | Software as a Service             |
| PaaS | Platform as a Service             |

## CHAPTER-1

### PROJECT SPECIFICATION

#### 1.1 Project Goal

Developing a Property Management Application Using Salesforce represents a significant opportunity to modernize and streamline the property management industry. This project's overarching goal is to enhance the efficiency and effectiveness of property management processes. By leveraging the capabilities of Salesforce, property managers can centralize their operations, automate routine tasks, and provide a comprehensive solution for both property owners and tenants.

A fundamental objective is to offer an enhanced tenant experience. The application should empower tenants with self-service portals for submitting maintenance requests, rent payments, and communication with property managers. This not only simplifies tenant interactions but also contributes to increased satisfaction and tenant retention.

Effective property management relies on comprehensive data management. The application should act as a centralized database for essential property information, such as lease agreements, tenant profiles, maintenance histories, and financial records. This data accessibility is crucial for informed decision-making and efficient reporting.

Automation is another key goal. Streamlining communication processes through automated reminders, notifications, and updates ensures that both tenants and property managers stay well-informed and can promptly respond to critical events.

Financial management is paramount. The application should provide tools for rent collection, expense tracking, and financial forecasting. These capabilities empower property managers to maintain accurate financial records and make data-driven decisions.

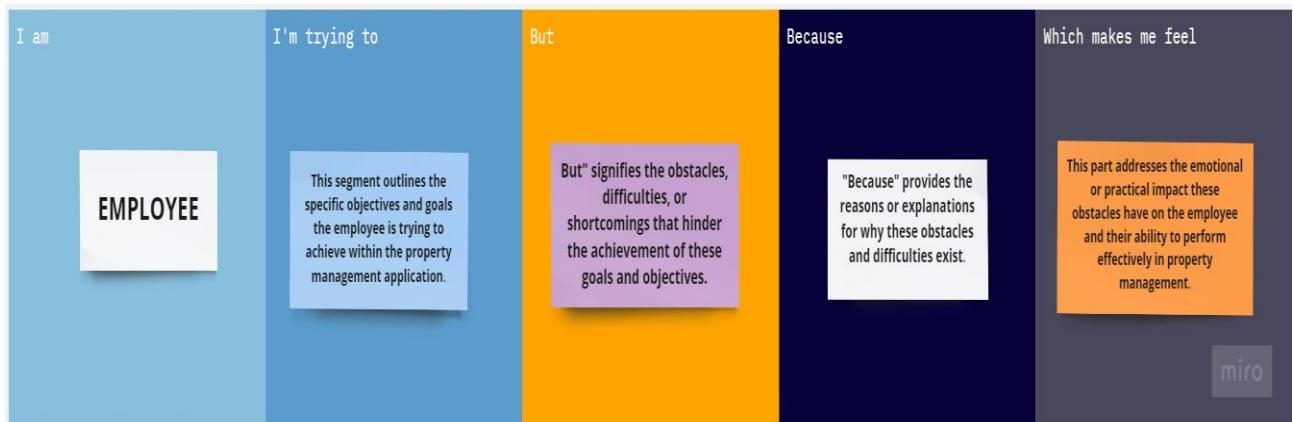
Maintenance and repair management should also be addressed. Developing a system for task submission, assignment to maintenance teams, progress tracking, and response time monitoring ensures that property maintenance is carried out efficiently, minimizing tenant dissatisfaction.

Document management is essential for maintaining important records and ensuring compliance with property management regulations. The application should offer a secure repository for lease agreements, inspection reports, and other pertinent documents.

## 1.2 Project Scope

The project scope for a Property Management Application Using Salesforce encompasses the development of a tailored digital solution aimed at enhancing property management processes. The core objective of this initiative is to leverage the capabilities of Salesforce to create a user-friendly and efficient application that caters to the specific needs of property managers, property owners, and tenants. Within this scope, the project will encompass the creation of distinct user modules, including portals for tenants, property managers, and property owners, each designed to streamline their interactions and tasks. Central to the scope is the establishment of a centralized database to manage crucial property information, encompassing lease agreements, tenant profiles, maintenance histories, and financial records, while automating data entry and maintenance tasks for greater accuracy and accessibility. Communication will also be a key focus, with features for automated communication workflows, in-app messaging, and robust financial management tools, including rent collection, expense tracking, and financial forecasting. Furthermore, the project will address maintenance and repair management through features for task submission, assignment to maintenance teams, and progress monitoring. The application will provide a secure document repository for important documents and facilitate reporting and analytics for data-driven decision-making. Integration with other relevant systems and scalability for future growth are also part of the project scope. Ensuring compliance with property management regulations, robust security measures, user training, mobile access, and cost-saving features complete the scope. Success will be measured by improved property management and communication for all stakeholders, with a commitment to continuous feedback and improvement to adapt to the evolving property management landscape.

### 1.3 Problem Statement Definition

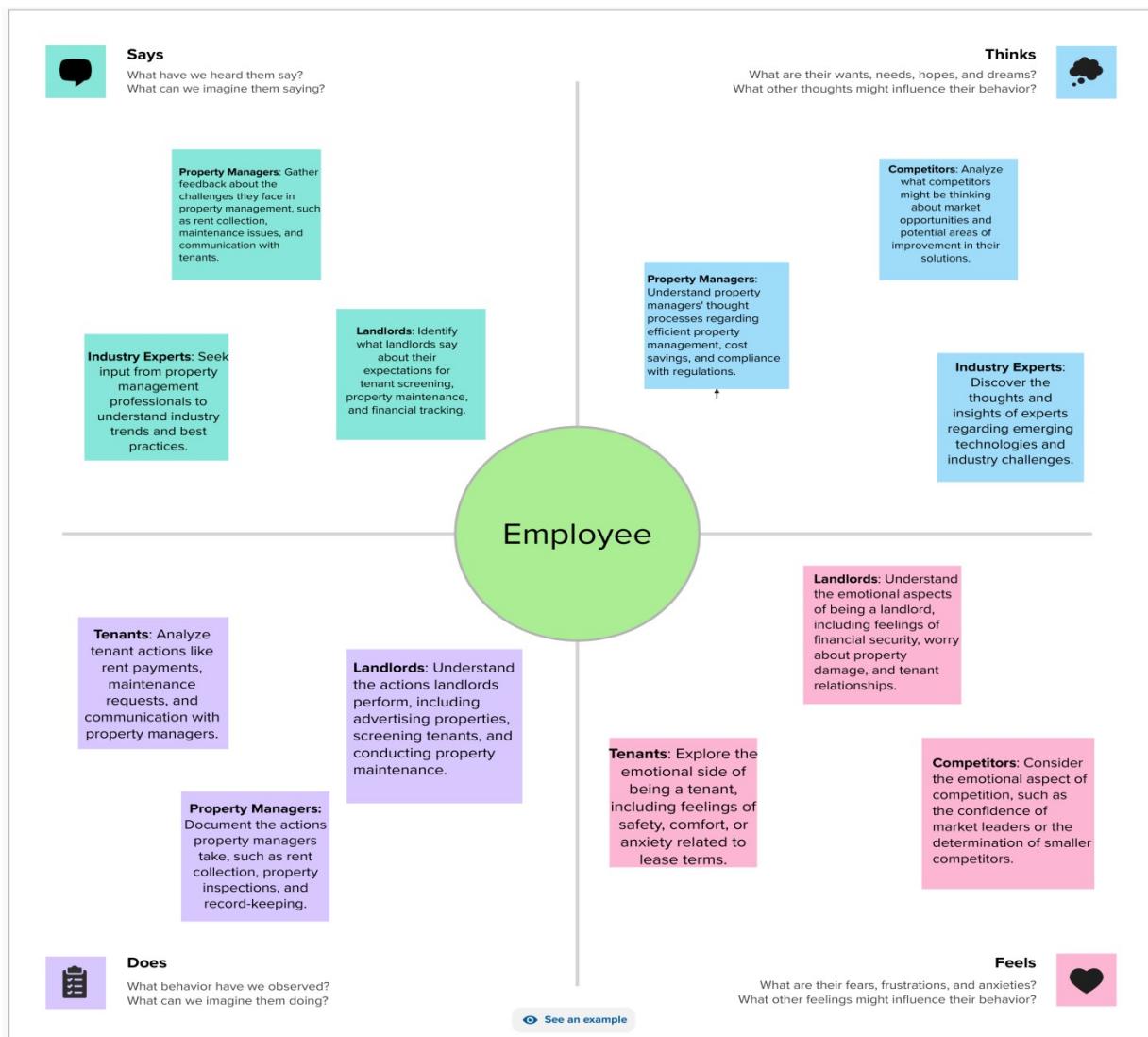


| Problem Statement (PS) | I am (Employee) | I'm trying to  | But   | Because  | Which makes me feel   |
|------------------------|-----------------|--|---|--|---|
| PS                     | Employee        | Property management professionals are trying to streamline their operations, improve tenant satisfaction, and optimize the efficiency of property management processes using a Property Management Application developed on the Salesforce platform. | "But" signifies the obstacles, difficulties, or shortcomings that hinder the achievement of these goals and objectives. | These obstacles exist because property management operations have traditionally relied on manual paperwork and spreadsheets, resulting in inefficiencies and errors. The absence of dedicated self-service portals and automation features is due to outdated systems and methods. | This part addresses the emotional or practical impact these obstacles have on the employee and their ability to perform effectively in property management. |

## 1.4 Empathy Map Canvas

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



## 1.5 Ideation & Brainstorming

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

### Step-1: Team Gathering, Collaboration and Select the Problem Statement:

**Template**

**Brainstorm & idea prioritization**

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

⌚ 10 minutes to prepare  
⌚ 1 hour to collaborate  
👤 2-8 people recommended

**Before you collaborate**

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

⌚ 10 minutes

**Define your problem statement**

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

⌚ 5 minutes

**Key rules of brainstorming**

To run an smooth and productive session

- Stay in topic.
- Encourage wild ideas.
- Defer judgment.
- Listen to others.
- Go for volume.
- If possible, be visual.

**Need some inspiration?**

See a finished version of this template to kickstart your work.

[Open example](#)

# Property Management Application Using Salesforce

## Step-2: Brainstorm, Idea Listing and Grouping:

**2 Brainstorm**  
Write down any ideas that come to mind that address your problem statement.  
**10 minutes**

**3 Group ideas**  
Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.  
**20 minutes**

**Person 1**

- Automated Lease Management:** Develop a system for lease creation, renewal, and tracking, allowing property managers to easily manage multiple leases and their respective terms.
- Maintenance Task Scheduler:** Create a tool that helps property managers assign maintenance tasks, set priorities, and track progress on maintenance requests, ensuring timely repairs and better property upkeep.

**Person 2**

- Tenant Screening Services:** Offer third-party tenant screening services that include credit checks, background checks, and lease history verification, making it easier for landlords to find reliable tenants.
- Financial Performance Reports:** Provide detailed financial performance reports, including rent income, expenses, and property appreciation, to help landlords track the profitability of their real estate investments.

**Person 3**

- Maintenance Request Portal:** Create a user-friendly maintenance request portal where tenants can submit, track, and follow up on maintenance requests. Property managers can see dates and estimated completion times for transparency.
- Rent Payment Options:** Offer various payment options, including online card, ACH (Automated Clearing House), and mobile payments, for tenant convenience, making rent payment hassle-free.

**Person 4**

- Inventory Management:** Implement inventory management tools that help maintenance personnel keep track of supplies and equipment, reorder items when necessary, and maintain efficient stock levels.
- Work Order Management:** Develop a work order management system that assigns tasks, tracks their progress, and provides maintenance personnel with detailed information about repair and maintenance requirements.

**User-Based Collaborative Filtering:** This type of filtering recommends items to a user based on the preferences of other users who are similar to them. It identifies users with similar past behaviors and recommends items liked by those similar users that the target user has not interacted with.

**Item-Based Collaborative Filtering:** Instead of focusing on user similarity, item-based collaborative filtering recommends items to a user that are similar to the items the user has previously interacted with. It identifies items that have been liked by users who have also liked or interacted with the same items as the target user.

## Step-3: Idea Prioritization:

4

### Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

⌚ 20 minutes

**TIP**  
Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the H key on the keyboard.



5

### After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

#### Quick add-ons

**A Share the mural**  
Share a link to the mural with stakeholders to keep them in the loop about the outcomes of the session.

**B Export the mural**  
Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.

#### Keep moving forward

**Strategy blueprint**  
Define the components of a new idea or strategy.  
[Open the template →](#)

**Customer experience journey map**  
Understand customer needs, motivations, and obstacles for an experience.  
[Open the template →](#)

**Strengths, weaknesses, opportunities & threats**  
Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.  
[Open the template →](#)

[Share template feedback](#)

## 1.6 Proposed Solution

| S. No | Parameter                                | Description  |
|-------|--|--|
| 1.    | Problem Statement (Problem to be solved) | <p>Corporates often grapple with inefficient and manual travel approval processes that involve paperwork and a lack of transparency. These outdated methods lead to delays, increased administrative work, and potential compliance issues. The process is a source of stress for employees who require timely approvals to plan their business trips effectively, and it leaves them dissatisfied with the process. Managers, on the other hand, struggle to review and manage a high volume of travel requests while ensuring compliance. The absence of transparency leads to bottlenecks and a lack of visibility, leaving them overwhelmed and frustrated.</p>  |
| 2.    | Idea / Solution description              | <p>Our proposed solution is to develop an Employee Travel Approval Application within Salesforce, offering automation and centralization. The application will provide a user-friendly and automated system that allows employees to submit travel requests seamlessly. Managers will be able to review and approve them efficiently, while the system offers real-time tracking of request statuses. It will also include integration with external systems for expense management, robust security measures, mobile accessibility and analytics tools for data-driven decision-making. The benefits include reduced administrative burdens, improved communication, cost control, and better compliance with corporate policies and regulations.</p> |

|    |                                       |   |
|----|---------------------------------------|---|
| 3. | Novelty / Uniqueness                  | <p>What sets our solution apart is the innovative use of Salesforce, a highly customizable and powerful platform, to streamline corporate travel management. The automation of approval workflows and integration with external systems will significantly reduce manual work and errors. The mobile app component will provide users with the flexibility and convenience of on-the-go access. Furthermore, the incorporation of robust reporting and analytics tools will enable data-driven decision-making and offer insights into travel expenses, setting our solution apart from conventional methods.</p>   |
| 4. | Social Impact / Customer Satisfaction | <p>Our application will have a substantial social impact by enhancing the user experience in corporate travel management. Employees and managers will benefit from a smoother, more transparent, and efficient travel approval process, reducing frustration and uncertainty. The streamlined process will free up time and resources for more strategic tasks, thereby improving overall workforce productivity. Data-driven decision-making will lead to better cost management, making it easier to control expenses and ensuring financial compliance. The application will also guarantee compliance with corporate policies and regulatory requirements, reducing risks and ensuring data security. Lastly, by optimizing travel planning, our solution can contribute to a more sustainable approach to business travel, aligning with corporate sustainability goals.</p> |

## 1.7 Functional & Technical Requirements

### 1.7.1 Functional Requirements

| FR No. | Functional Requirement (Epic) | Sub Requirement (Story / Sub-Task)   |
|--------|-------------------------------|--|
| FR-1   | User Modules:                 | <p><b>Tenant Portal:</b> Tenants should have access to a portal for submitting maintenance requests, paying rent online, and viewing lease agreements.</p> <p><b>Property Manager Portal:</b> Property managers need a dedicated portal to manage properties, view tenant information, track maintenance activities, and access financial records.</p> |
| FR-2   | Centralized Data Management:  | <p><b>Property Management Dashboard:</b> Property managers require a central dashboard to view and manage properties, tenants, and maintenance requests.</p> <p><b>Tenant Profiles:</b> Detailed tenant profiles with contact information, lease details, and history.</p>   |
| FR-3   | Financial Management:         | <p><b>Rent Collection:</b> Support for multiple payment methods, including credit cards, bank transfers, and electronic checks.</p> <p><b>Expense Tracking and Forecasting:</b> Expense tracking for property managers, allowing them to record and categorize expenses.</p>   |
| FR-4   | Maintenance and Repairs:      | <p><b>Maintenance Request System:</b> An efficient system for submitting maintenance requests with details, photos, and urgency levels.</p> <p><b>Task Assignment:</b> Property managers should assign tasks to maintenance teams and contractors.</p>   |
| FR-5   | Document Repository:          | <p><b>Secure Document Storage:</b> A secure repository for storing important documents, such as lease agreements, inspection reports, and property-related records.</p> <p><b>Document Management:</b> Features for easy retrieval, upload, and management of documents.</p>   |
| FR-6   | Reporting and Analytics:      | <p><b>Customizable Reporting:</b> A reporting system that allows property managers to generate customized reports on key performance metrics.</p> <p><b>Analytics:</b> Tools for analyzing data, including occupancy rates, rent arrears, and maintenance response times.</p>  |

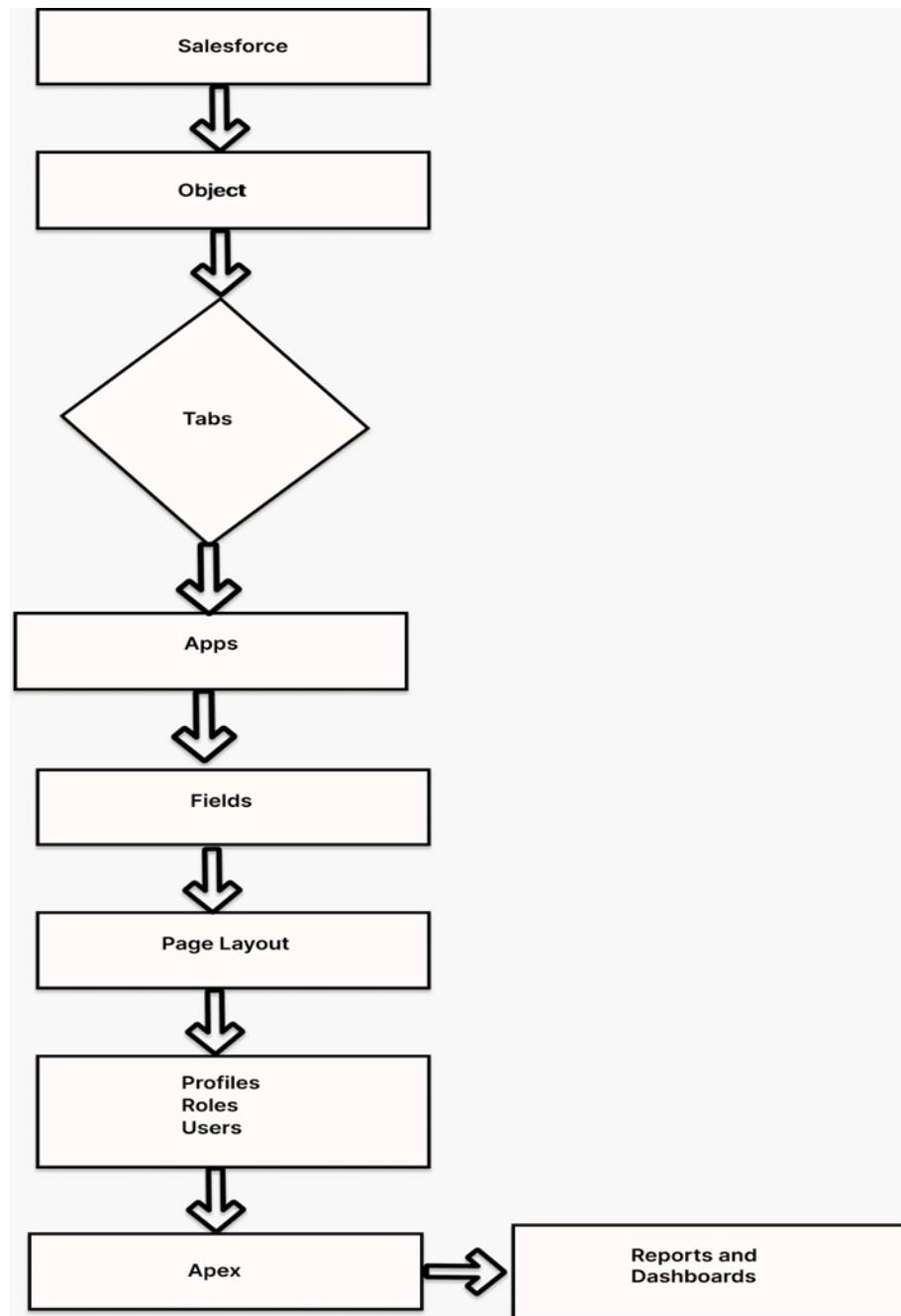
### 1.7.2 Technical Requirements

| TR No. | Technical Requirement      | Description  |
|--------|----------------------------|--|
| TR-1   | Salesforce Platform:       | The application must be built on the Salesforce platform, leveraging its CRM capabilities and cloud infrastructure for scalability, security, and integration with other systems. Salesforce offers a range of tools and services that can be used for building custom applications. |
| TR-2   | Cloud Hosting:             | The application and its database should be hosted on cloud servers to ensure high availability, scalability, and data redundancy. Salesforce provides cloud-based services, which is vital for remote access and data security.  |
| TR-3   | Security Measures:         | Data security is of utmost importance. The application should implement Salesforce's security features, including user authentication, access controls, and encryption, to protect sensitive property and financial data.  |
| TR-4   | Integration Capabilities:  | The application should be capable of integrating with external systems, such as accounting software and CRM tools, to ensure seamless data exchange. Salesforce offers a wide range of integration options, including APIs and middleware.   |
| TR-5   | Performance Optimization:  | The application should be optimized for performance, ensuring quick response times even as the user base and data volume increase. Salesforce's infrastructure is designed for scalability and performance.  |
| TR-6   | User Training and Support: | Develop user training materials, including guides and video tutorials, to help property managers, tenants, and property owners effectively use the application. Provide ongoing support through Salesforce Communities or Service Cloud for issue resolution                         |

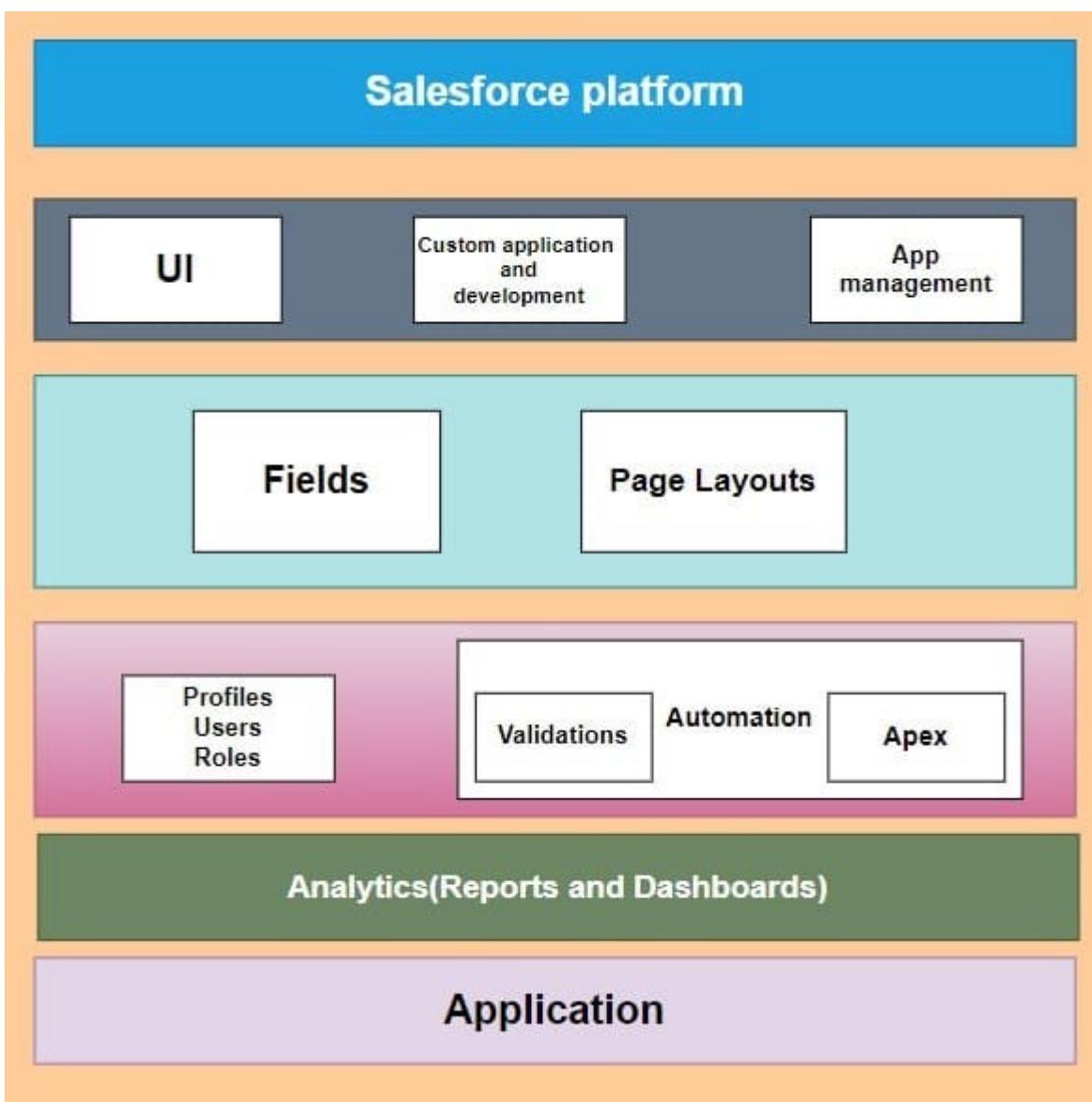
## 1.8 Project Road Map

### 1.8.1 Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



### 1.8.2 Technical Architecture



**TABLE-1: Component and Technologies:**

| S.No | Component     | Description  | Technology |
|------|---------------|--|------------|
| 1.   | User Modules: | <b>Lightning Components:</b> Use Salesforce Lightning components to design the user interface for employees, managers, and administrators.<br><b>Custom Pages:</b> Create custom Visualforce pages for more tailored and complex UI elements | Salesforce |
| 2.   | Data Model    | <b>Custom Objects:</b> Define custom objects in Salesforce to represent entities like  | Salesforce |

|    |                         |  |            |
|----|-------------------------|--|------------|
|    |                         | <p>travel requests, expenses, and approvals.</p> <p><b>Master-Detail and Lookup</b></p> <p><b>Relationships:</b> Establish relationships between objects to maintain data integrity.</p> <p><b>Custom Fields:</b> Create custom fields to capture specific information, such as travel dates, expenses, and approval status.</p>   |            |
| 3. | Workflow Automation     | <p><b>Approval Processes:</b> Implement Salesforce Approval Processes to automate and streamline the travel request approval workflow.</p> <p><b>Process Builder and Flows:</b> Use Process Builder and Flows to automate routine tasks and send notifications.</p>  | Salesforce |
| 4. | Reporting and Analytics | <p><b>Custom Reports:</b> Create custom reports to track travel request status, expenses, and other relevant metrics.</p>  | Salesforce |
| 5. | Security                | <p><b>Role-Based Access Control (RBAC):</b> Configure RBAC to control who can access and modify data.</p> <p><b>Data Encryption:</b> Encrypt sensitive data both in transit and at rest.</p> <p><b>Audit Trails:</b> Maintain audit trails to log user activities for security and compliance purposes.</p>  | Salesforce |
| 6. | Salesforce Development  | <p><b>Apex:</b> Use Salesforce's proprietary programming language, Apex, for server-side logic and data manipulation.</p> <p><b>Visualforce:</b> Develop custom user interfaces with Visualforce pages and components.</p> <p><b>Lightning Web Components:</b> Create modern, component-based UIs using Lightning Web Components for a more responsive and dynamic user experience</p> | Salesforce |

**Table-2: Application Characteristics:**

| S. No | Characteristics   | Description  | Technology |
|-------|-------------------|--|------------|
| 1.    | Responsive Design | The application is designed with a responsive user interface, ensuring it adapts seamlessly to various screen sizes and devices, including desktops, laptops, tablets, and mobile phones. This characteristic allows property managers, tenants, and property owners to access the application on their preferred devices, providing a consistent and user-friendly experience.. | salesforce |
| 2.    | Accessibility     | Accessibility is a key feature of the application, making it usable by individuals with diverse needs. It complies with accessibility standards and offers features like screen reader compatibility, keyboard navigation, and alt text for images, ensuring that all users, regardless of physical abilities, can interact with the application effectively.                    | salesforce |
| 3.    | User-friendly     | The user-friendliness of the application is at the forefront of its design. The interface is intuitive and easy to navigate, with clear menus, well-organized content, and user-friendly forms.  | Salesforce |
| 4.    | Scalability       | The application is built with scalability in mind. As the property portfolio grows, the system can easily accommodate new properties, tenants, and features without a significant decrease in performance. This scalability is achieved through efficient database design and optimization.  | salesforce |

## Property Management Application Using Salesforce

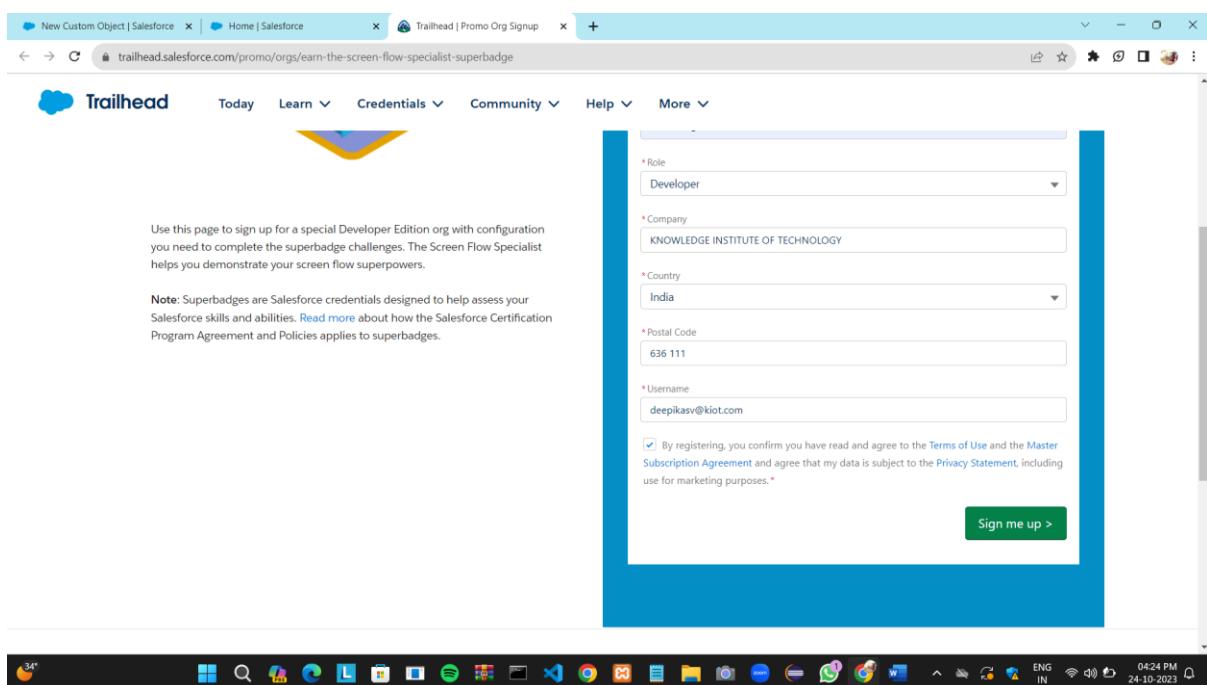
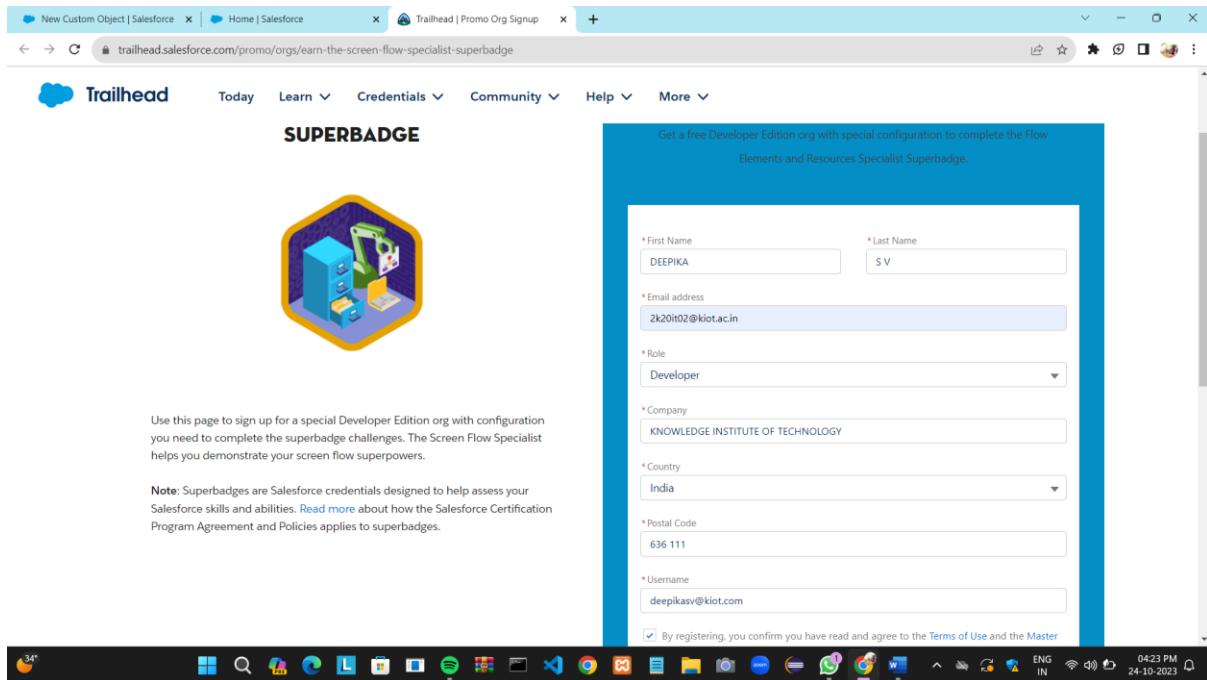
|    |                         |   |            |
|----|-------------------------|---|------------|
| 5. | Performance             | High performance is a fundamental characteristic of the application. It is designed to deliver quick response times, even when handling substantial data volumes and complex operations.  | salesforce |
| 6. | Reporting and Analytics | : Reporting and analytics are integral components of the application, providing property managers with valuable insights into property performance and financial data. Custom reports and dashboards are available, allowing users to track metrics such as occupancy rates, revenue, expenses, and maintenance response times. | salesforce |

## CHAPTER-2

### PREPARATION DATA MODELING

#### 2.1 Salesforce Developer Org

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.



## Account Activation

Activation tracks information about devices from which users have verified their identity.

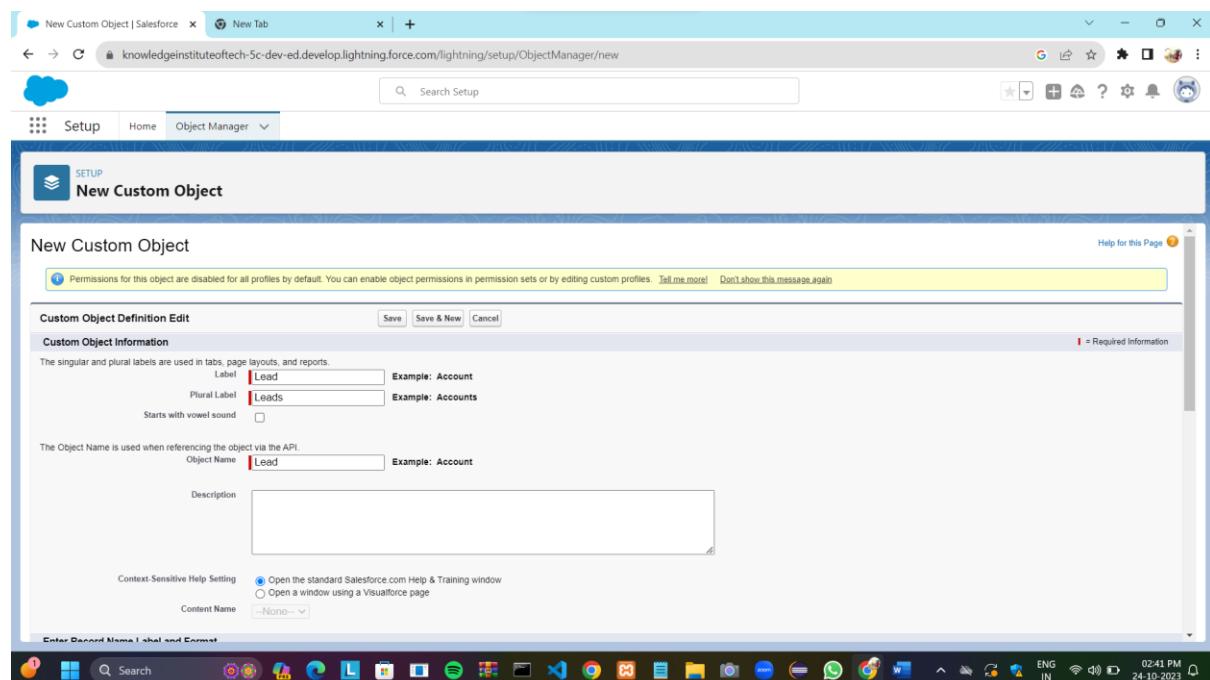
## 2.2 Custom Object Creation & Tabs

### NEW CUSTOM OBJECT CREATION

#### First object creation

Objects are containers for your information, but they also give you special functionality. Custom objects are created to store information that's specific to your company or industry.

Custom Objects in Lead:



## Property Management Application Using Salesforce

The screenshot shows the Salesforce Setup interface for the Lead object. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Record Types. The main pane displays the Details section for the Lead object, which includes fields such as API Name (Lead\_c), Singular Label (Lead), Plural Label (Leads), and various status and history settings.

## Second Object Creation

The screenshot shows the Salesforce Setup interface for creating a new custom object. The page title is "New Custom Object". The "Custom Object Definition Edit" form is filled out with the following details:

- Custom Object Information:** Label: Property, Example: Account; Plural Label: Properties, Example: Accounts; Starts with vowel sound:
- API Name:** Object Name: Property, Example: Account
- Description:** A large text area for description is present but empty.
- Help Settings:** Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window (selected).
- Content Name:** None

## Property Management Application Using Salesforce

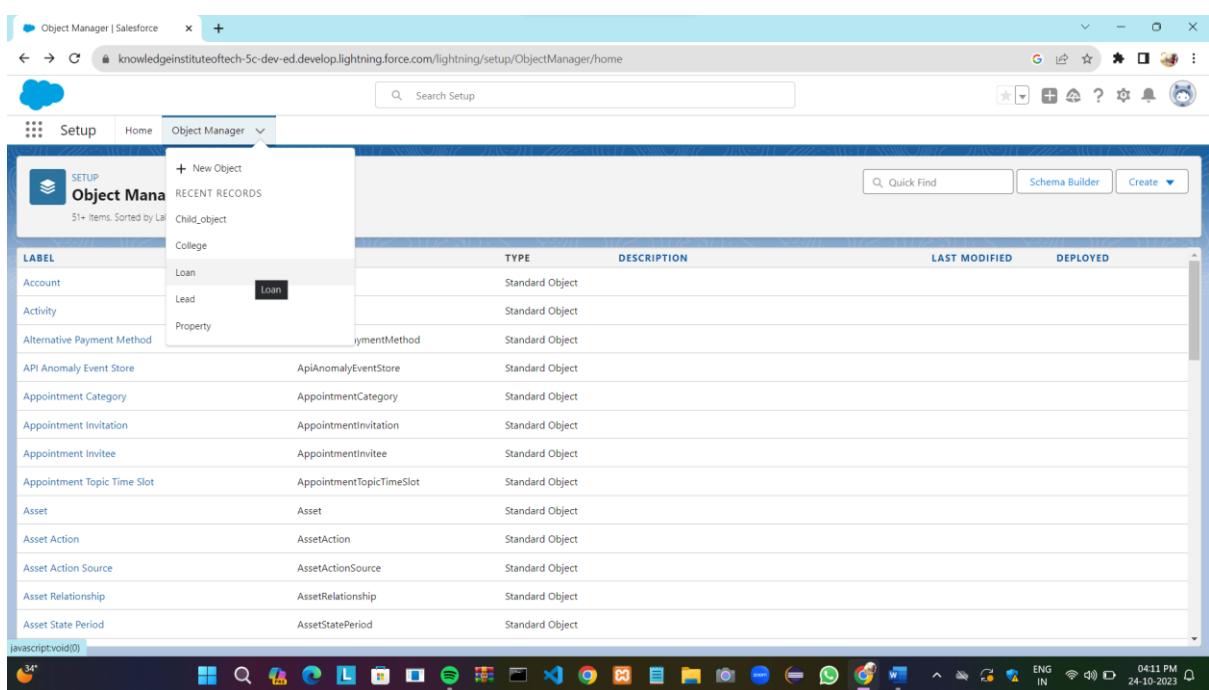
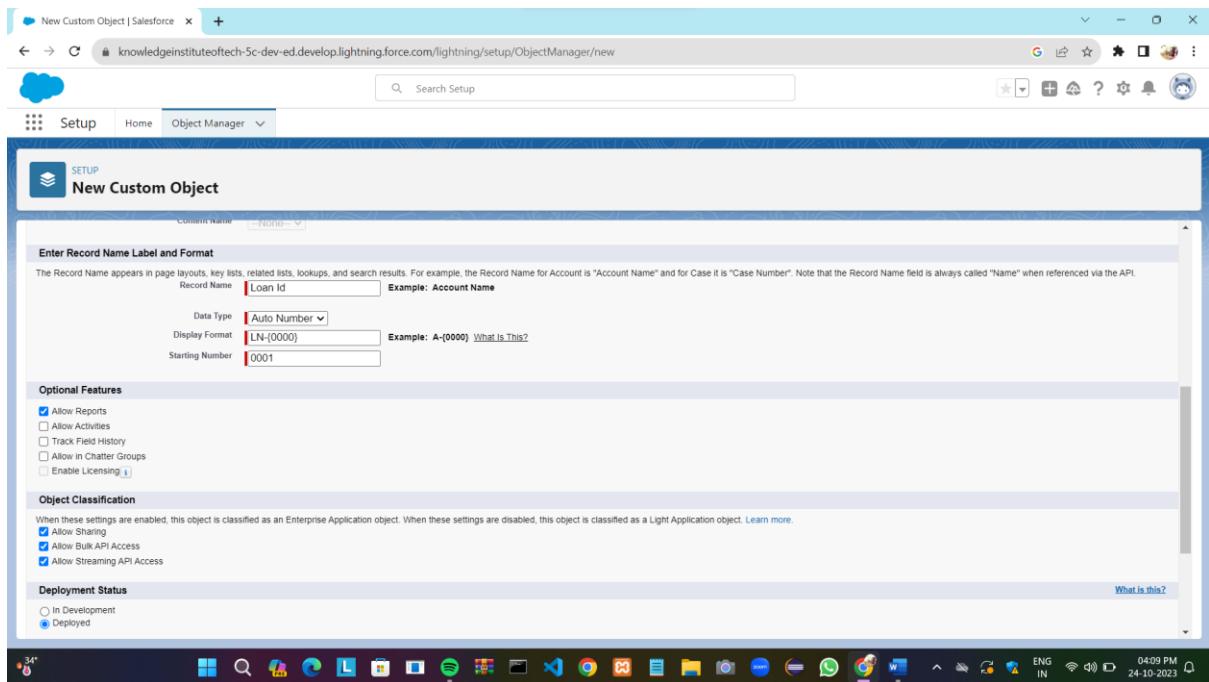
### Fields in Property Object

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Details' tab selected under 'Fields & Relationships'. The main 'Details' section shows the API Name as 'Property\_\_c'. Other fields include Singular Label ('Property'), Plural Label ('Properties'), and various configuration options like 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). The status bar at the bottom indicates it's 04:00 PM on 24-10-2023.

### Third Object creation

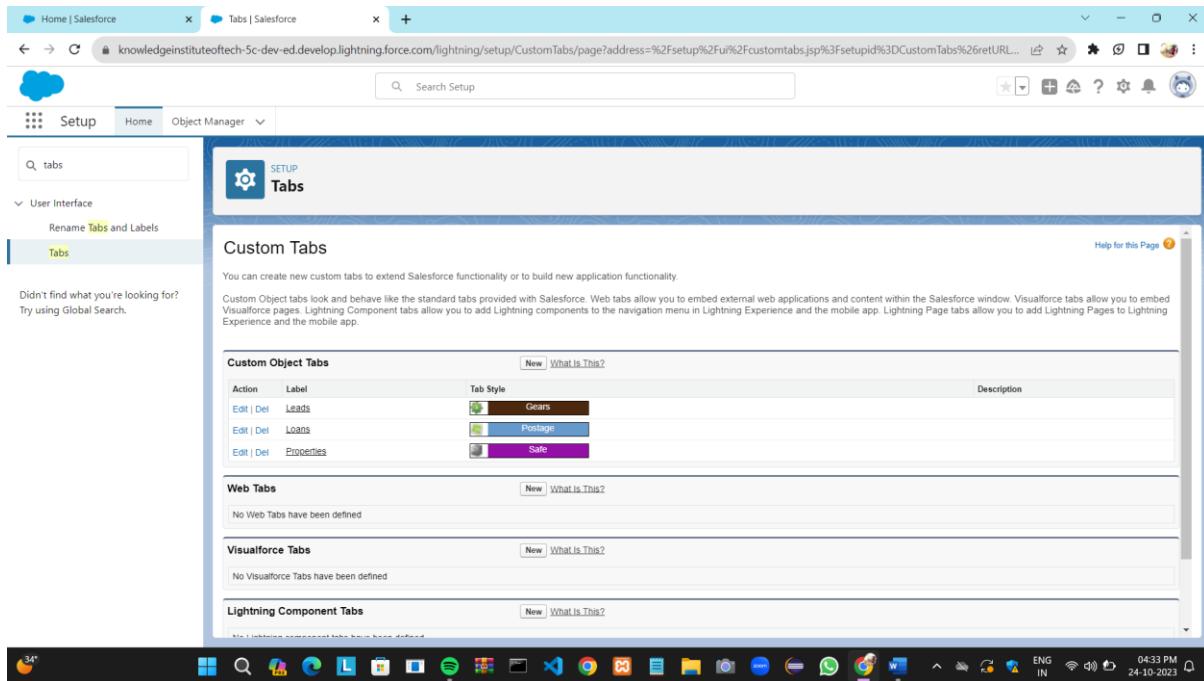
The screenshot shows the 'New Custom Object' setup page. The 'Custom Object Information' section is filled out with the label 'Loan' and plural label 'Loans'. The 'Object Name' field also contains 'Loan'. There are checkboxes for 'Starts with vowel sound' and 'Content Name' (set to 'None'). The status bar at the bottom indicates it's 04:09 PM on 24-10-2023.

## Property Management Application Using Salesforce



## Tabs

Salesforce Tabs are like the menu options in a software application. They allow you to access specific functions, objects, or data.



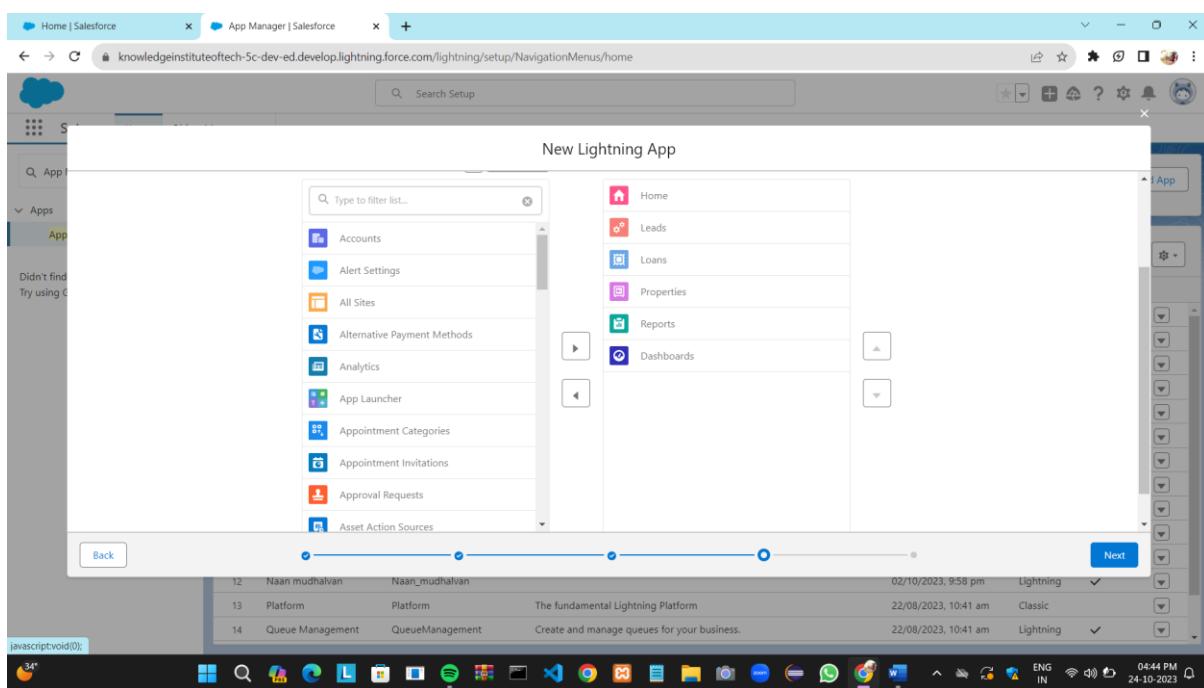
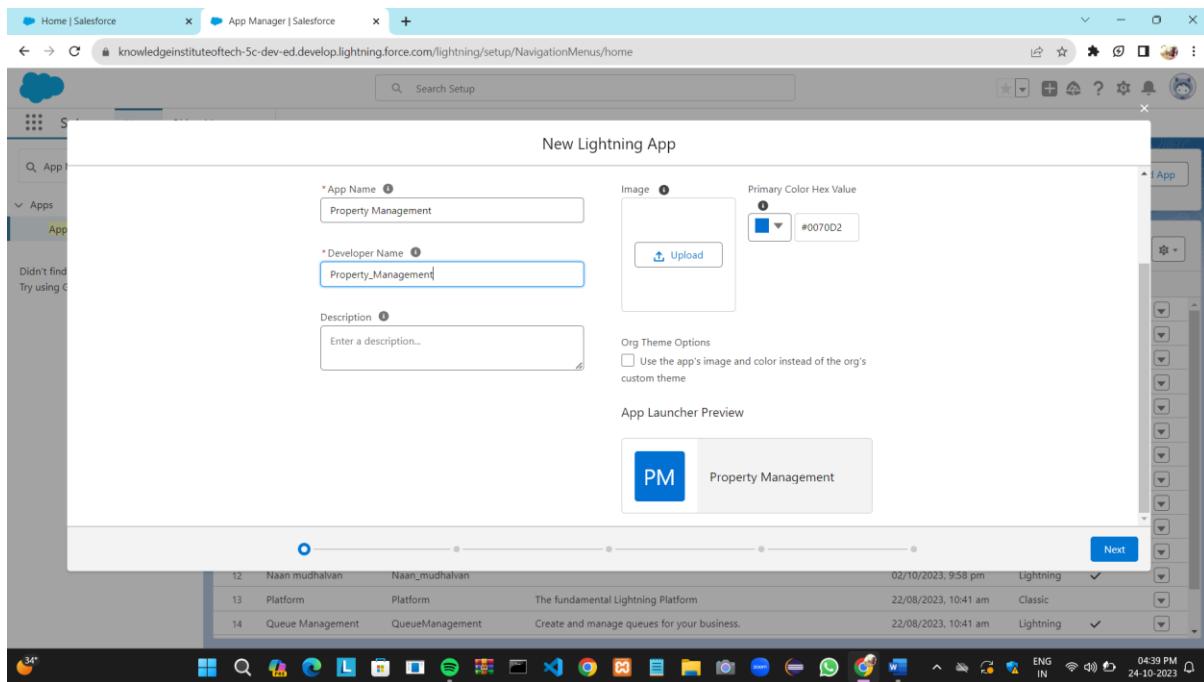
## 2.3 Lightning App

The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience, giving your users what they need all in one place.

### Create a Travel Approval Lightning App

- Build a Lightning app, add tabs, and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.

## Property Management Application Using Salesforce



## Property Management Application Using Salesforce

The screenshot shows the Salesforce App Manager interface. The title bar reads "Home | Salesforce" and "App Manager | Salesforce". The main content area is titled "Lightning Experience App Manager" and displays a table of 24 items. The table columns are: App Name ↑, Developer Name, Description, Last Modified Date, App Type, and Visibility. The "Property Management" app is highlighted in the table.

| App Name ↑                     | Developer Name           | Description   | Last Modified Date   | App Type  | Visibility |
|--------------------------------|--------------------------|---|----------------------|-----------|------------|
| 10 Lightning Usage App         | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience                    | 22/08/2023, 10:41 am | Lightning | ✓          |
| 11 Marketing                   | Marketing                | Best-in-class on-demand marketing automation                                | 22/08/2023, 10:41 am | Classic   | ✓          |
| 12 Naan mudhalvan              | Naan_mudhalvan           |   | 02/10/2023, 9:58 pm  | Lightning | ✓          |
| 13 Platform                    | Platform                 | The fundamental Lightning Platform  | 22/08/2023, 10:41 am | Classic   | ✓          |
| 14 Property Management         | Property_Management      |   | 24/10/2023, 4:46 pm  | Lightning | ✓          |
| 15 Queue Management            | QueueManagement          | Create and manage queues for your business.                                 | 22/08/2023, 10:41 am | Lightning | ✓          |
| 16 Sales                       | Sales                    | The world's most popular sales force automation (SFA) solution              | 22/08/2023, 10:41 am | Classic   | ✓          |
| 17 Sales                       | LightningSales           | Manage your sales process with accounts, leads, opportunities, and more     | 22/08/2023, 10:41 am | Lightning | ✓          |
| 18 Sales Console               | LightningSalesConsole    | (Lightning Experience) Lets sales reps work with multiple records on one... | 22/08/2023, 10:41 am | Lightning | ✓          |
| 19 Salesforce Chatter          | Chatter                  | The Salesforce Chatter social network, including profiles and feeds         | 22/08/2023, 10:41 am | Classic   | ✓          |
| 20 Salesforce Scheduler Set... | LightningScheduler       | Set up personalized appointment scheduling.                                 | 22/08/2023, 10:44 am | Lightning | ✓          |
| 21 Service                     | Service                  | Manage customer service with accounts, contacts, cases, and more            | 22/08/2023, 10:41 am | Classic   | ✓          |
| 22 Service Console             | LightningService         | (Lightning Experience) Lets support agents work with multiple records a...  | 22/08/2023, 10:41 am | Lightning | ✓          |
| 23 Site.com                    | Sites                    | Build pixel-perfect, data-rich websites using the drag-and-drop Site.co...  | 22/08/2023, 10:41 am | Classic   | ✓          |

The screenshot shows the Salesforce Home page for the "Property Management" application. The title bar reads "Home | Salesforce" and "Home | Salesforce". The main content area features a "Quarterly Performance" chart and two cards: "Today's Events" and "Today's Tasks". The "Assistant" sidebar on the right says "Nothing needs your attention right now. Check back later." The bottom status bar shows system information like battery level, signal strength, and the date/time.

# Property Management Application Using Salesforce

The screenshot shows the Salesforce Leads page. The top navigation bar includes links for Home, Leads, Loans, Properties, Reports, and Dashboards. The main content area displays a list of leads, with a header indicating "0 items • Sorted by Customer Name • Filtered by All leads • Updated a few seconds ago". A search bar at the top right says "Search...". Below the header, there is a sorting option "Customer Name ↑". A message "No items to display." is centered on the page. At the bottom, there are buttons for New, Import, Change Owner, and Printable View. The status bar at the bottom shows system information like battery level (34%), network connectivity, and the date/time (24-10-2023).

## Fields

### Field in loan

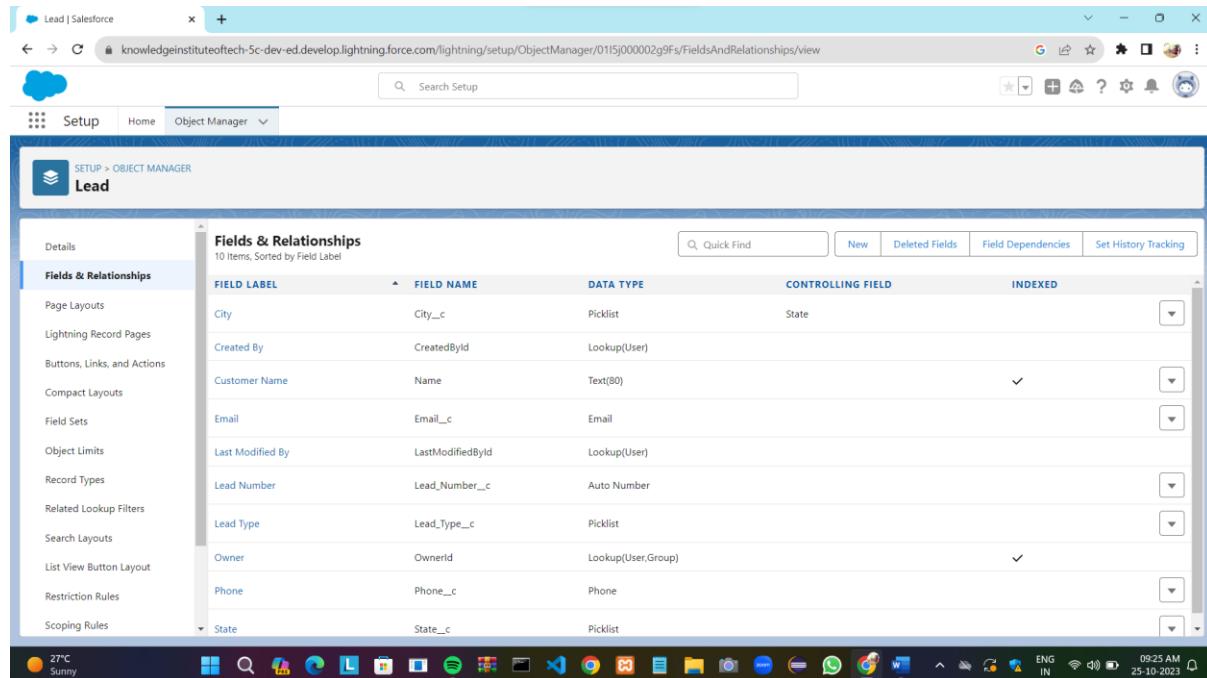
The screenshot shows the Salesforce Object Manager for the "Loan" object. The left sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Fields & Relationships" and shows a table of 14 items, sorted by Field Label. The table columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Annual Loan      | Annual_Loan__c   | Number(18, 0)      |                   |         |
| Created By       | CreatedBy        | Lookup(User)       |                   |         |
| Customer Name    | Customer_Name__c | Lookup(Lead)       |                   | ✓       |
| Due Date         | Due_Date__c      | Date/Time          |                   |         |
| Interest Rate    | Interest_Rate__c | Currency(18, 0)    |                   |         |
| Last Modified By | LastModifiedBy   | Lookup(User)       |                   |         |
| Loan Amount      | Loan_Amount__c   | Formula (Currency) |                   |         |
| Loan Id          | Name             | Auto Number        |                   | ✓       |
| Loan Name        | Name__c          | Auto Number        |                   |         |

The status bar at the bottom shows system information like battery level (27°C), network connectivity, and the date/time (25-10-2023).

## Property Management Application Using Salesforce

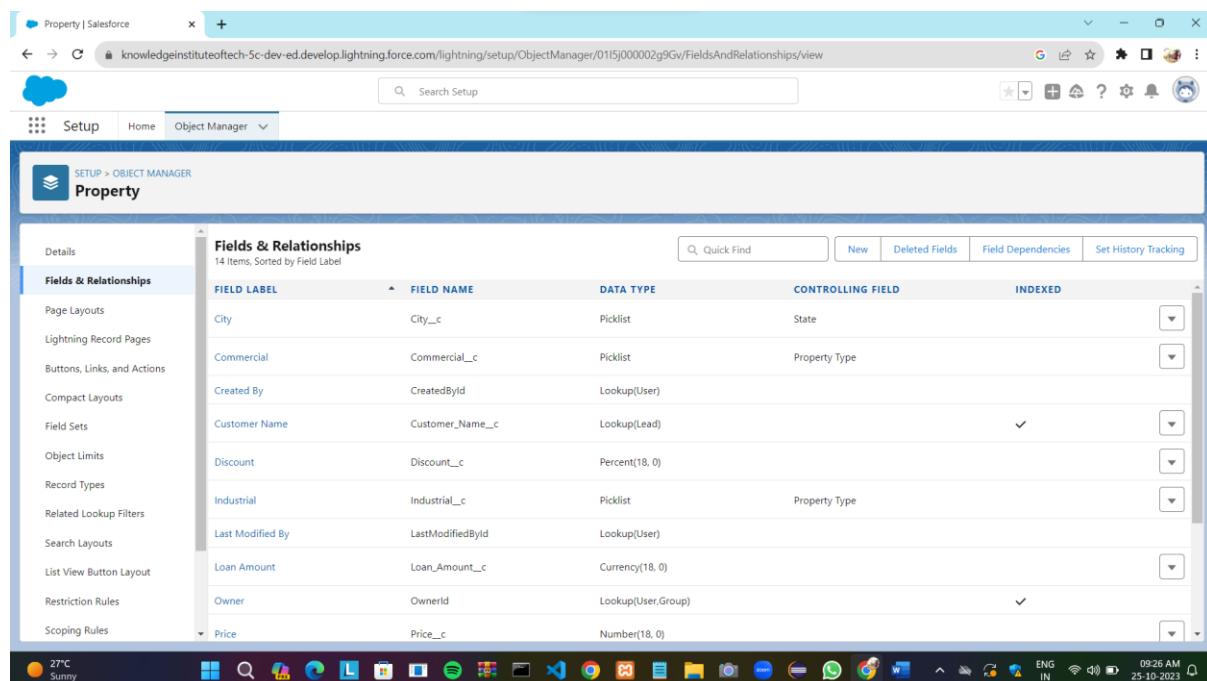
### Field in lead



The screenshot shows the Salesforce Object Manager interface for the 'Lead' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table titled 'Fields & Relationships' with 10 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| City             | City__c          | Picklist           | State             |         |
| Created By       | CreatedById      | Lookup(User)       |                   |         |
| Customer Name    | Name             | Text(80)           |                   | ✓       |
| Email            | Email__c         | Email              |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| Lead Number      | Lead_Number__c   | Auto Number        |                   |         |
| Lead Type        | Lead_Type__c     | Picklist           |                   |         |
| Owner            | OwnerId          | Lookup(User,Group) |                   | ✓       |
| Phone            | Phone__c         | Phone              |                   |         |
| State            | State__c         | Picklist           |                   |         |

### Field in property



The screenshot shows the Salesforce Object Manager interface for the 'Property' object. The left sidebar lists various setup options. The main area displays a table titled 'Fields & Relationships' with 14 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

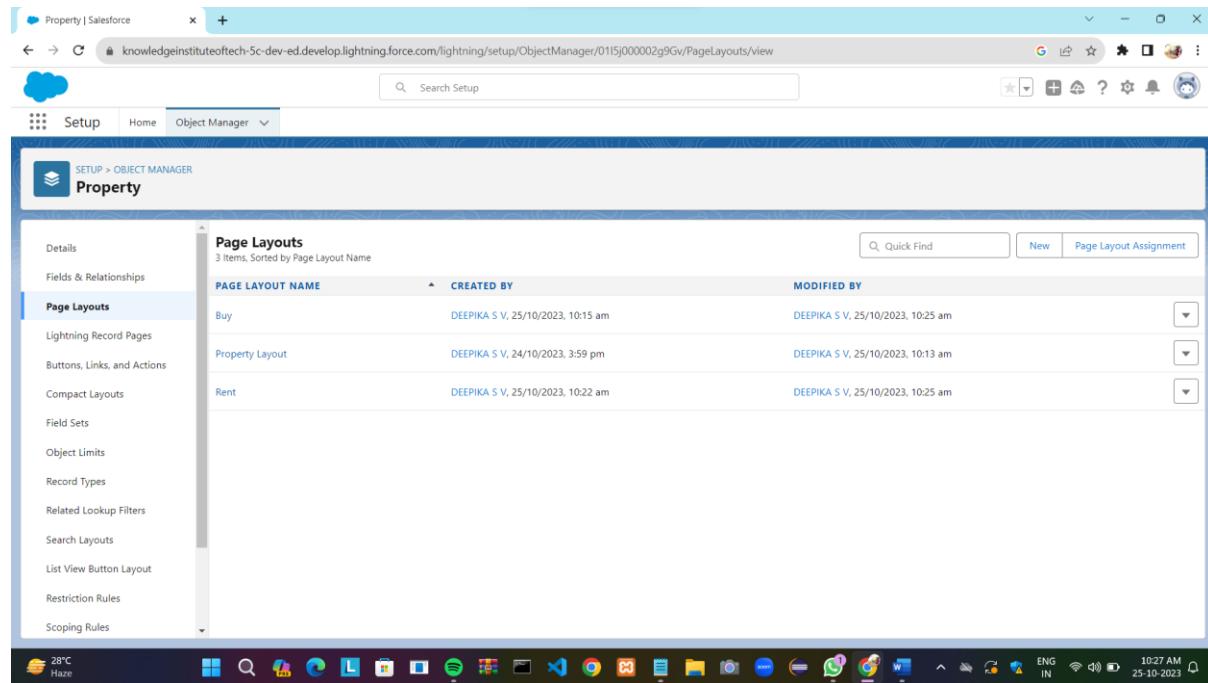
| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| City             | City__c          | Picklist           | State             |         |
| Commercial       | Commercial__c    | Picklist           | Property Type     |         |
| Created By       | CreatedById      | Lookup(User)       |                   |         |
| Customer Name    | Customer_Name__c | Lookup(Lead)       |                   | ✓       |
| Discount         | Discount__c      | Percent(18, 0)     |                   |         |
| Industrial       | Industrial__c    | Picklist           | Property Type     |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| Loan Amount      | Loan_Amount__c   | Currency(18, 0)    |                   |         |
| Owner            | OwnerId          | Lookup(User,Group) |                   | ✓       |
| Price            | Price__c         | Number(18, 0)      |                   |         |
|                  |                  |                    |                   |         |
|                  |                  |                    |                   |         |
|                  |                  |                    |                   |         |

## 2.5 Customize User Interface

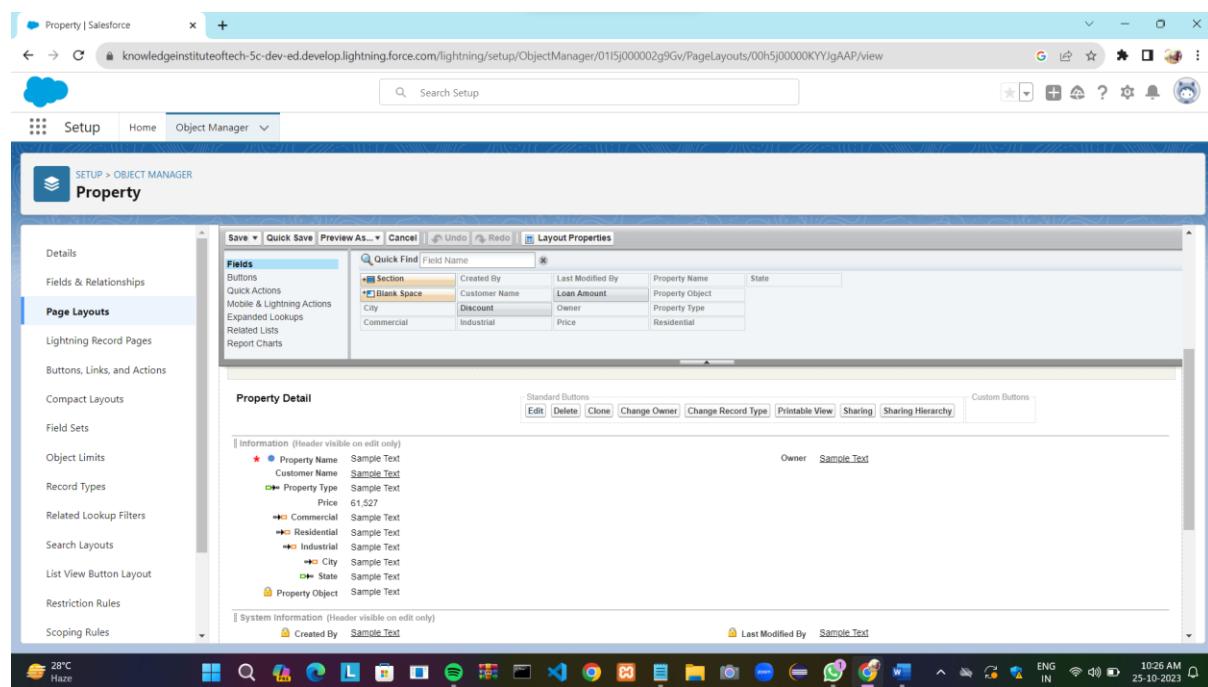
Customize your app's page layouts

### Page Layout

A page layout determines the fields, sections, related lists, and buttons that appear when users view or edit a record. You can modify an object's default page layout or create a custom page layout.



The screenshot shows the Salesforce Object Manager interface for the 'Property' object. The left sidebar navigation menu is visible, with 'Page Layouts' selected. The main content area displays a table titled 'Page Layouts' with three items: 'Buy', 'Property Layout', and 'Rent'. Each row includes columns for 'Page Layout Name', 'Created By', and 'Modified By'. The 'Property Layout' row is currently selected. The top right of the screen shows standard Salesforce navigation and search tools.



The screenshot shows the Salesforce Object Manager interface for the 'Property' object, specifically editing a page layout. The left sidebar navigation menu is visible, with 'Page Layouts' selected. The main content area shows the 'Layout Properties' section for a page layout named 'Blank Space'. It includes tabs for 'Fields', 'Buttons', 'Quick Actions', and 'Mobile & Lightning Actions'. Below these tabs, there are sections for 'Property Detail' (with fields like Property Name, Customer Name, Price, etc.) and 'System Information' (with fields like Created By, Last Modified By, etc.). The bottom right of the screen shows standard Salesforce navigation and search tools.

# Property Management Application Using Salesforce

## Record types for property

The screenshot shows the 'New Record Type' page for the 'Property' object. The 'Record Type' section is filled out with:

|                      |                                     |
|----------------------|-------------------------------------|
| Existing Record Type | -Master-                            |
| Record Type Label    | Buy                                 |
| Record Type Name     | Buy                                 |
| Description          | (empty)                             |
| Active               | <input checked="" type="checkbox"/> |

Below this, under 'Profile Name', two profiles are listed with checkboxes for 'Make Available':

| Profile Name                     | Record Types Currently Available | Make Available                      | Make Default             |
|----------------------------------|----------------------------------|-------------------------------------|--------------------------|
| Analytics Cloud Integration User |                                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Analytics Cloud Security User    |                                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

The screenshot shows the 'Edit' screen for the 'Buy' Record Type. The record details are:

|                   |                                  |
|-------------------|----------------------------------|
| Record Type Label | Buy                              |
| Record Type Name  | Buy                              |
| Namespace Prefix  |                                  |
| Description       |                                  |
| Created By        | DEEPIKA.S.V 25/10/2023, 10:30 am |
| Modified By       | DEEPIKA.S.V 25/10/2023, 10:30 am |

Below this, the 'Picklists Available for Editing' section lists fields and their values:

| Action | Field         | Modified Date        |
|--------|---------------|----------------------|
| Edit   | City          | 25/10/2023, 10:30 am |
| Edit   | Commercial    | 25/10/2023, 10:30 am |
| Edit   | Industrial    | 25/10/2023, 10:30 am |
| Edit   | Property Type | 25/10/2023, 10:30 am |
| Edit   | Residential   | 25/10/2023, 10:30 am |
| Edit   | State         | 25/10/2023, 10:30 am |

## Property Management Application Using Salesforce

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Property' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Record Types. The main content area displays a table titled 'Record Types' with two entries: 'Buy' and 'Rent'. The 'Buy' record type is active and was modified by Deepika S V on 25/10/2023 at 10:30 am. The 'Rent' record type is also active and was modified by Deepika S V on 25/10/2023 at 10:33 am. A 'Quick Find' bar and a 'Page Layout Assignment' button are visible at the top right.

### Page layout assignment

#### For Buy

The screenshot shows the 'Edit Page Layout Assignment' screen for the 'Buy' record type of the 'Property' object. The left sidebar shows the 'Page Layouts' section. The main table lists profiles (e.g., Analytics Cloud Integration User, Analytics Cloud Security User) and their corresponding page layout assignments. For the 'Buy' record type, the 'Master' column shows 'Buy' and the 'Buy' column shows 'Property Layout'. A dropdown menu indicates '29 Selected' and '58 Changed'. The status bar at the bottom shows it's 31°C and sunny.

#### For Rent

## Property Management Application Using Salesforce

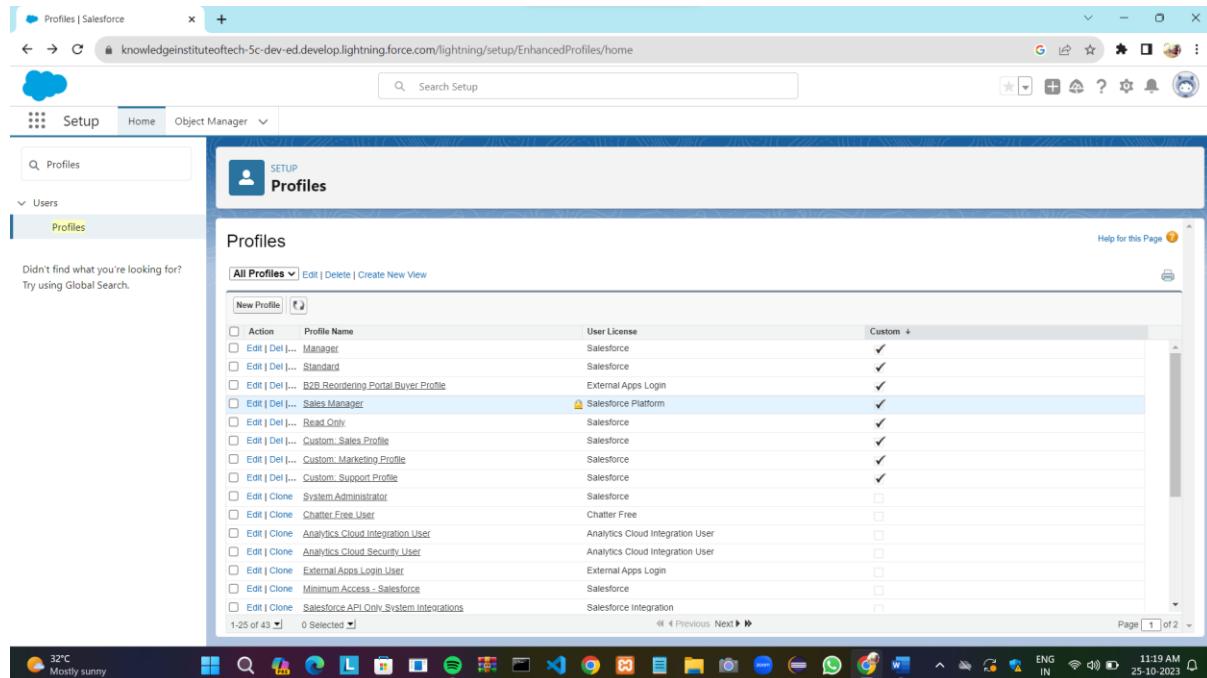
The screenshot shows the Salesforce Setup interface for the 'Property' object. On the left, a sidebar lists various configuration tabs like Details, Fields & Relationships, Page Layouts, and Record Types. The 'Page Layouts' tab is selected, displaying a table titled 'Edit Page Layout Assignment' for the 'Property' object. The table has columns for 'Profiles' (listing user profiles) and 'Record Types' (Master, Buy, Rent). A dropdown at the top indicates 'Page Layout To Use: Rent'. The table shows multiple rows where the 'Buy' and 'Rent' record types are assigned the 'Rent' page layout. A status bar at the bottom right shows '10:46 AM 25-10-2023'.

## Profile

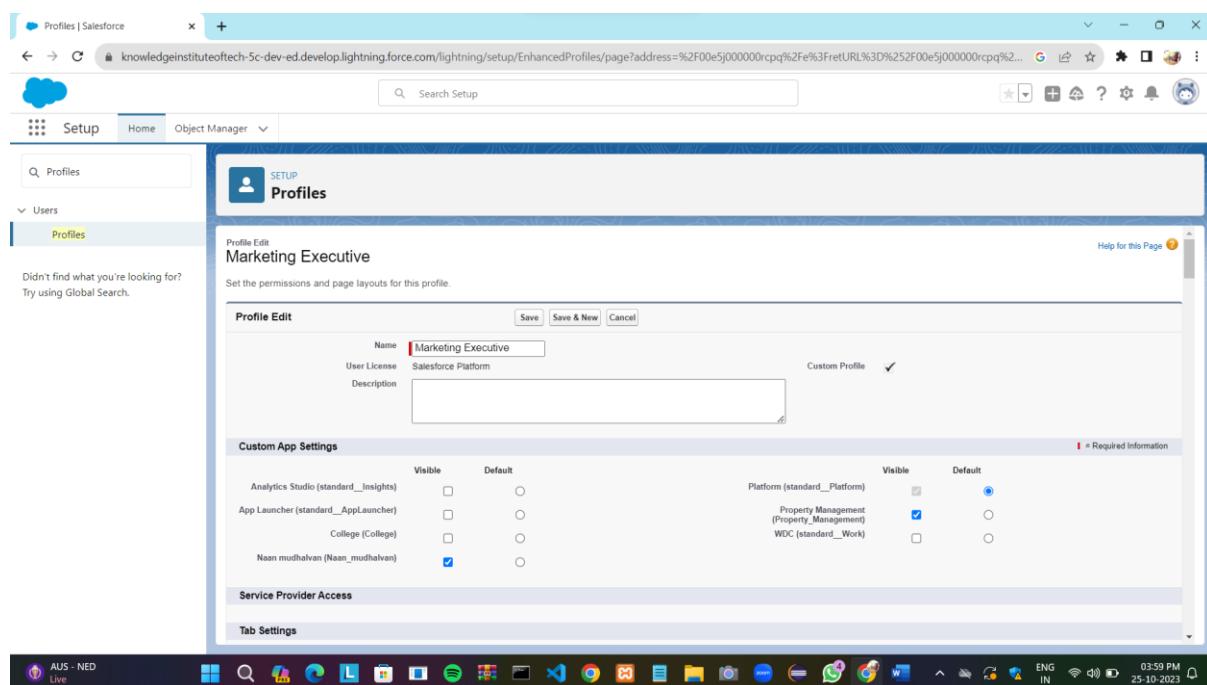
The screenshot shows the Salesforce Setup interface for 'Profiles'. The left sidebar shows 'Profiles' is selected under the 'Users' category. The main area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', and 'User License'. The table lists various profiles such as 'Analytics Cloud Security User', 'External Apps Login User', 'Salesforce API Only System Integrations', etc. A status bar at the bottom right shows '11:17 AM 25-10-2023'.

# Property Management Application Using Salesforce

## Newly created profile



The screenshot shows the Salesforce Setup interface under the Profiles section. The main title is "Profiles". Below it, there's a sub-header "All Profiles" with options to "Edit | Delete" or "Create New View". A "New Profile" button is visible. The main content is a table listing 43 profiles. The columns are "Action", "Profile Name", "User License", and "Custom". Some profiles listed include "Manager", "Standard", "B2B Reordering Portal Buyer Profile", "Sales Manager", "Read Only", "Custom\_Sales\_Profile", "Custom\_Marketing\_Profile", "Custom\_Support\_Profile", "System Administrator", "Chatter Free User", "Analytics Cloud Integration User", "Analytics Cloud Security User", "External Apps Login User", "Minimum Access - Salesforce", and "Salesforce API Only System Integrations". The "Custom" column contains checkmarks for most profiles. At the bottom of the table, it says "1-25 of 43" and "0 Selected". The status bar at the bottom right shows "Page 1 of 2".



The screenshot shows the "Profile Edit" screen for a profile named "Marketing Executive". The title bar says "Profile Edit Marketing Executive". It includes fields for "Name" (Marketing Executive), "User License" (Salesforce Platform), and "Description". There are tabs for "Custom App Settings" and "Service Provider Access". Under "Custom App Settings", there are sections for "Analytics Studio (standard\_Insights)", "App Launcher (standard\_AppLauncher)", "College (College)", and "Naan mudhalvan (Naan\_mudhalvan)". The "Platform (standard\_Platform)" section has "Property Management (Property\_Management)" checked. The status bar at the bottom right shows "Page 1 of 2".

## Property Management Application Using Salesforce

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, there's a sidebar with various setup categories like Service Setup Assistant, Commerce Setup Center, and Administration. The main content area is titled 'Profiles' and contains 'Custom Object Permissions' for several objects: Colleges, departments, Leads, Loans, and Properties. Under each object, there are tabs for 'Basic Access' and 'Data Administration' with checkboxes for Read, Create, Edit, Delete, View All, and Modify All. Below this, there are sections for 'Session Settings' (Session Times Out After: 2 hours of inactivity) and 'Password Policies' (User passwords expire in: 90 days, etc.).

The screenshot shows the 'Profile Edit' screen for the 'Marketing Manager' profile. The top navigation bar has 'Profiles' selected. The main form includes fields for Name (Marketing Manager), User License (Salesforce Platform), and Description. There are tabs for 'Custom App Settings', 'Service Provider Access', and 'Tab Settings'. In the 'Custom App Settings' tab, there are two tables of application settings with columns for 'Visible' and 'Default'. One application, 'Property Management (Property\_Management)', is set to both Visible and Default.

## Property Management Application Using Salesforce

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Commerce Setup Center, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues), and a JavaScript error message. The main content area displays 'Custom Object Permissions' for 'Colleges', 'departments', 'Leads', 'Loans', and 'Properties'. It also shows 'Session Settings' (Session Times Out After: 2 hours of inactivity) and 'Password Policies' (User passwords expire in: 90 days, etc.). The bottom status bar shows system information: 33°C Haze, ENG IN, 05:25 PM, 25-10-2023.

## User profile

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar includes links for Users (Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, Prospector), and a search bar. The main content area displays the 'User Detail' for 'Sunny Gupta' with various configuration tabs like Edit, Sharing, Reset Password, and Freeze. The user details include Name: Sunny Gupta, Alias: Sanj, Email: 2k20102@kot.ac.in, Username: sunnygupta@thesmarbridge1.com, Nickname: Sunny, Title: , Company: , Department: , Division: , Address: 4300 Balaji Nagar,M.Perumapalayam(P.O),Vallappatty(T.K),Salem(D.T), SALEM 636 111, TAMIL NADU, India, 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, Role: Salesforce, User License Profile: Sales Manager, Active: checked, Marketing User: , Offline User: , Knowledge User: , Flow User: , Service Cloud User: , Site.com Contributor User: , Site.com Publisher User: , WDC User: , Mobile Push Registrations: View, Data.com User Type: , Accessibility Mode (Classic Only): , Debug Mode: . The bottom status bar shows system information: 32°C Haze, ENG IN, 05:59 PM, 25-10-2023.

# Property Management Application Using Salesforce

## Permission set

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Search | Salesforce Trailhead, Property management application
- Left Sidebar:** Permission Sets | Salesforce, Search | Salesforce Trailhead, knowledgeinstituteoftech-5c-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp
- Top Bar:** Home, Object Manager, Search Setup, Help for this Page
- Content Area:**
  - Section:** Permission Sets
  - Form:** Create
  - Fields:** Label (Sales Rep3), API Name (SalesRep3), Description (None), Session Activation Required (unchecked)
  - Help Text:** Who will use this permission set?
    - Choose 'None' if you plan to assign this permission set to multiple users with different user and permission set licenses.
    - Choose a specific user license if you want users with only one license type to use this permission set.
    - Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
  - License Selection:** License (None)
- Bottom Bar:** Save, Cancel

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Search | Salesforce Trailhead, Property management application
- Left Sidebar:** Permission Sets | Salesforce, Search | Salesforce Trailhead, knowledgeinstituteoftech-5c-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP5j000008grWc%2Fe%3Fs%3DEntityPermissions%26o%3D015j000002...  
Video Tutorial | Help for this Page
- Top Bar:** Home, Object Manager, Search Setup
- Content Area:**
  - Section:** Permission Sets
  - Table:** Sales Rep3
  - Actions:** Find Settings, Clone, Delete, Edit Properties, Manage Assignments, View Summary (Beta)
  - Tab:** Properties
  - Form:** Tab Settings (Available, Visible), Record Type Assignments (Buy, Rent), Object Permissions (Read, Create, Edit, Delete, View All)
- Bottom Bar:** Save, Cancel

## Property Management Application Using Salesforce

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar and navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Sales Rep3' and shows the 'Assignment Summary' for the permission set. A table lists one assignment:

| Full Name   | User License | Expires On | Time Zone | Status  |
|-------------|--------------|------------|-----------|---------|
| Sunny Gupta | Salesforce   |            |           | Success |

The status column includes a green checkmark icon.

## Setup for OWD

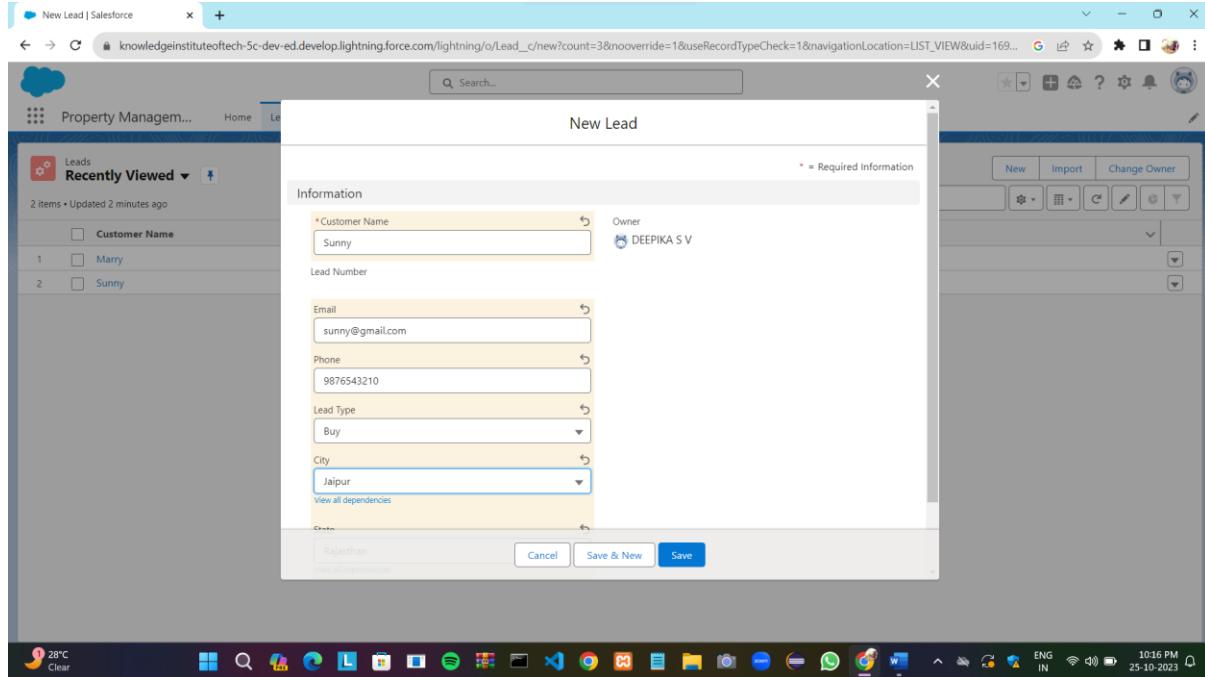
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar and navigation links for 'Sharing setting', 'Security', and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and shows the 'Sharing Settings' page. A message at the top states: 'One or more sharing operations has been initiated. See below for additional details. Certain operations may not be available.' Below this, there is a section for 'Manage sharing settings for: All Objects' and a 'Disable External Sharing Model' button. The 'Default Sharing Settings' table is displayed:

| Object               | Default Internal Access    | Organization-Wide Defaults Help |                                |
|----------------------|----------------------------|---------------------------------|--------------------------------|
|                      |                            | Default External Access         | Grant Access Using Hierarchies |
| Lead                 | Public Read/Write/Transfer | 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          | ✓                              |

# Property Management Application Using Salesforce

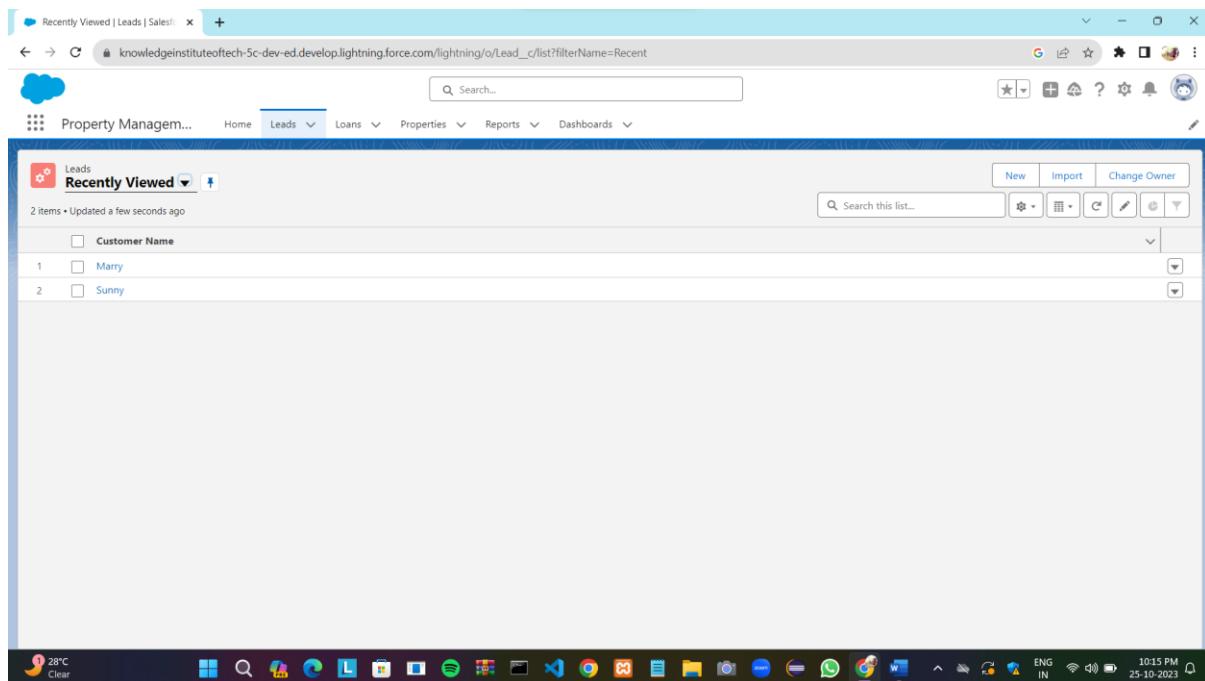
## User Adoption

### Created record



### List View

A list view is a set of search conditions that displays records that match the search conditions.



## Property Management Application Using Salesforce

### Delete Record

The screenshot shows the Salesforce Lightning interface for a Property Management application. The user is viewing the 'Recently Viewed' leads list. The list includes two entries: 'Marry' and 'Sunny'. A context menu is open over the entry for 'Marry', with the 'Delete' option highlighted.

The screenshot shows the Salesforce Lightning interface after the lead 'Marry' has been deleted. A green confirmation message box is displayed at the top center, stating 'Lead "Marry" was deleted. Undo'. The list now only contains 'Sunny'.

# Property Management Application Using Salesforce

**Classic Email Templates**

**Unfiled Public Classic Email Templates**

| Action     | Email Template Name   | Template Type | Available For Use | Description   | Author     | Last Modified Date |
|------------|---|---------------|-------------------|---|------------|--------------------|
| Edit   Del | Appointment for Unauthenticated User using Appointment Types - For Amazon Chime | Custom        | ✓                 | Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon Chime                     | sfdcadmin  | 22/08/2023         |
| Edit   Del | Appointment for Unauthenticated User using Appointment Types - For third party  | Custom        | ✓                 | Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications   | sfdcadmin  | 22/08/2023         |
| Edit   Del | Appointment for Unauthenticated User using Engagement Channels-For Amazon Chime | Custom        | ✓                 | Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon Chime                   | sfdcadmin  | 22/08/2023         |
| Edit   Del | Appointment for Unauthenticated User using Engagement Channels-For third party  | Custom        | ✓                 | Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications | sfdcadmin  | 22/08/2023         |
| Edit   Del | Commerce Reorder Portal_Invitation  | Text          | ✓                 | Invite a contact to a Commerce Reorder Portal.  | autoconfig | 19/10/2023         |
| Edit   Del | Loan Amount pay   | Text          | ✓                 |   | DS_V       | 26/10/2023         |
| Edit   Del | Loan Amount pay_Reminder  | Text          | ✓                 |   | DS_V       | 26/10/2023         |
| Edit   Del | Overdue   | Text          | ✓                 |   | DS_V       | 26/10/2023         |
| Edit   Del | Overdue_by one day  | Text          | ✓                 |   | DS_V       | 26/10/2023         |
| Edit   Del | Sales_New Customer Email  | Text          | ✓                 | Email to new customers  | DS_V       | 22/08/2023         |
| Edit   Del | SUPPORT_Self-Service New Comment Notification (SAMPLE)                          | Text          | ✓                 | Sample email template that can be sent to your Self-Service customers to notify them a public   | DS_V       | 22/08/2023         |

**Classic Email Templates**

**Loan Amount pay Reminder**

**Email Template Detail**

| Email Templates from Salesforce                | Unfiled Public Classic Email Templates | Available For Use                             |
|--|--|---|
| Email Template Name: Loan Amount pay_Reminder  | Available For Use: ✓                   | Last Used Date: Times Used:                   |
| Template Unique Name: Loan_Amount_pay_Reminder |  |   |
| Encoding: Unicode (UTF-8)                      |  |   |
| Author: DEEPIKA.S.V [change]                   |  |   |
| Description:                                   |  |   |
| Created By: DEEPIKA.S.V 26/10/2023, 10:43 pm   |  | Modified By: DEEPIKA.S.V 26/10/2023, 10:46 pm |

**Email Template**

**Plain Text Preview**

```
Hello {!Loan__c_OwnerFirstName}.

It is the reminder mail for you that your due date is closer please pay the amount on time.

Thanks and Regards,
Deepika
```

## Property Management Application Using Salesforce

### Email alert

The screenshot shows the 'Email Alerts' setup page. A new alert is being created with the following details:

- Description: Email for 24 hrs before
- Unique Name: Email\_for\_24\_hrs\_before
- Object: None
- Email Template: Loan Amount pay Reminder

The 'Recipients' section shows a list of available users (DEEPIKA S, DEEPIKA S.V, Deepika Vayapuri, Integration User, Security User, Sunny Gupta, Surya Vayapuri) and a selected recipient list which is currently empty.

The screenshot shows the 'All Email Alerts' page. It displays a table of existing email alerts:

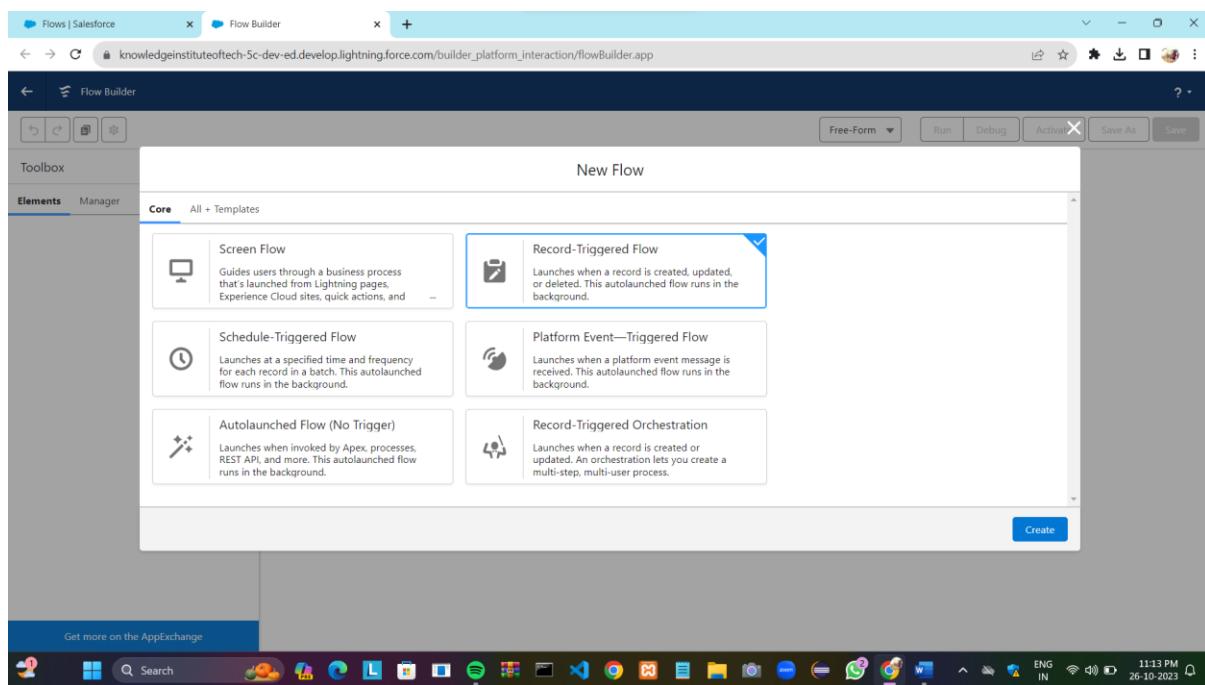
| Action     | Description             | Email Template Name      | Object | Last Modified Date |
|------------|-------------------------|--------------------------|--------|--------------------|
| Edit   Del | Email for 5 days before | Loan Amount pay Reminder | Loan   | 26/10/2023         |
| Edit   Del | Email for 24 hrs before | Loan Amount pay          | Loan   | 26/10/2023         |
| Edit   Del | Overdue                 | Loan Amount pay Reminder | Loan   | 26/10/2023         |
| Edit   Del | Overdue_by_one_day      | Loan Amount pay Reminder | Loan   | 26/10/2023         |

## CHAPTER-3

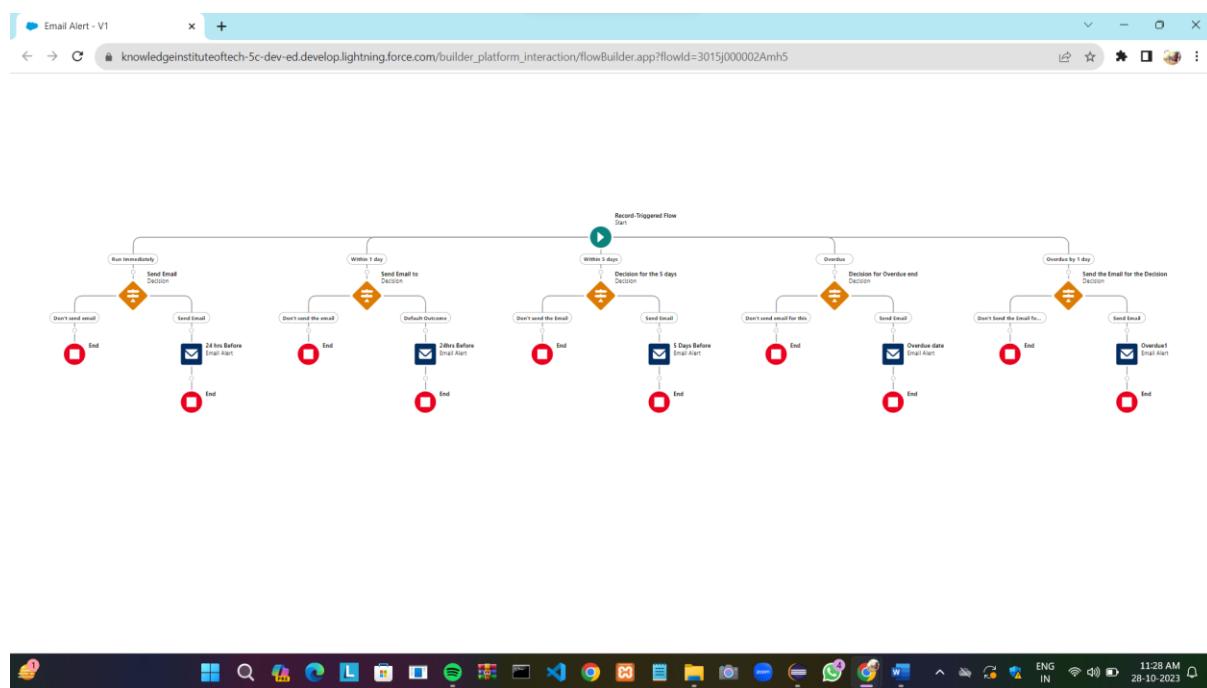
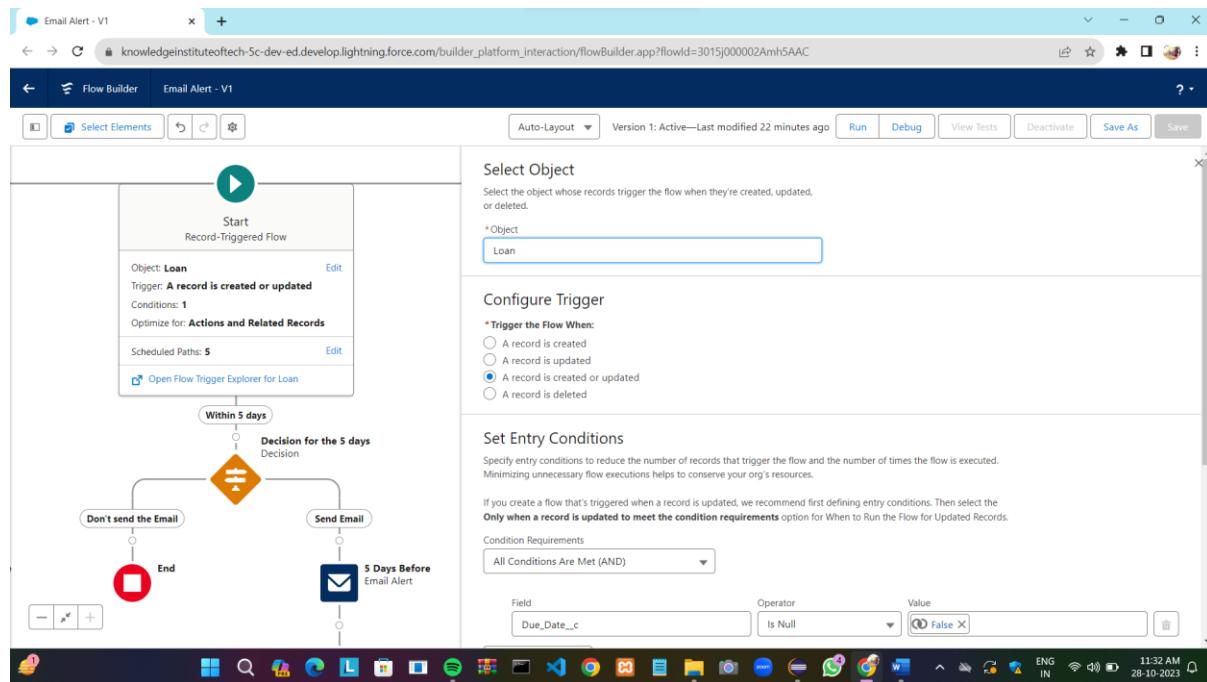
### AUTOMATION

#### 3.1 Flow

The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that provide a declarative, drag-and-drop design environment to build our business process logic.



## Property Management Application Using Salesforce



### 3.2 Apex

```

1 * public static void propMethod(List<Property__c> propVar){
2
3
4
5 * public class propClass {
6
7     for(Property__c prop:propVar){
8
9         if (prop.Create_Property_Type__c== 'Residential'){
10
11             prop.Commercial__c='shop';
12
13         }else{
14
15
16         }
17
18     }
19
20 }
```

```

1 * trigger propTrigger on Property__c (before update) {
2
3     if(trigger.isUpdate){
4
5         if(trigger.isBefore){
6
7             propClass.propMethod(trigger.new);
8
9         }
10
11     }
12
13 }
```

## REPORTS & DASHBOARD

### 4.1 Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits.

The report builder provides a drag-and-drop interface to easily build and customize your reports.

Create Report

Select a Report Type

Report Type Name: Loans with Property name Category: Standard

Details

Loans with Property name Standard Report Type

Start Report

Created By You  
No Reports Yet

Created By Others  
No Reports Yet

Objects Used in Report Type  
Owner

Property with Customer Name Report / Loans with Property name

| Property name: Created Date | Property name: Property Name | Customer Name | Property name: City | Property name: Property Type | Property name: Commercial | Property name: Residential |
|-----------------------------|------------------------------|---------------|---------------------|------------------------------|---------------------------|----------------------------|
| 26/10/2023 (2)              | GuruKripa                    | Marry         | Jaipur              | Residential                  | -                         | 2BHK                       |
|                             | Mahima group                 | Sunny         | Nashik              | Commercial                   | Shop                      | -                          |
| <b>Total (2)</b>            |                              |               |                     |                              |                           |                            |

## Property Management Application Using Salesforce

The screenshot shows the Salesforce Report Builder interface. The report title is "Loans with Property name". The report structure is defined by the following fields:

- Groups:** GROUP ROWS, GROUP COLUMNS.
- Fields:** Property name: Property Name, Customer Name, Property name: Record ID, Loan Amount.
- Columns:** Customer Name, Property name: Record ID, # Loan Amount.

The report preview shows the following data:

| Property name: Property Name | Customer Name | Property name: Record ID | Loan Amount   |
|------------------------------|---------------|--------------------------|---------------|
| GuruKripa (1)                | Sunny         | a01500000cgj89           | ₹1,01,307.16  |
| <b>Subtotal</b>              |               |                          | ₹1,01,307.16  |
| Mahima group (1)             | Many          | a01500000cgjD            | ₹1,01,307.16  |
| <b>Subtotal</b>              |               |                          | ₹1,01,307.16  |
| Prop1 (1)                    | Many          | a01500000cgjd            | ₹1,01,307.16  |
| <b>Subtotal</b>              |               |                          | ₹1,01,307.16  |
| Prop2 (1)                    | Sunny         | a01500000cgjhB           | ₹6,88,702.09  |
| <b>Subtotal</b>              |               |                          | ₹6,88,702.09  |
| <b>Total (4)</b>             |               |                          | ₹15,92,623.37 |

The screenshot shows the Salesforce Report Builder interface. The report title is "Loans with Property name". The report structure is defined by the following fields:

- Groups:** GROUP ROWS, GROUP COLUMNS.
- Fields:** Property name: Created Date, Property name: Property Name, Customer Name, Property name: City, Property name: Property Type, Property name: Commercial, Property name: Residential.
- Columns:** Property name: Property Name, Customer Name, Property name: City, Property name: Property Type, Property name: Commercial, Property name: Residential.

The report preview shows the following data:

| Property name: Created Date | Property name: Property Name | Customer Name | Property name: City | Property name: Property Type | Property name: Commercial | Property name: Residential |
|-----------------------------|------------------------------|---------------|---------------------|------------------------------|---------------------------|----------------------------|
| 26/10/2023 (4)              | GuruKripa                    | Sunny         | Jaipur              | Residential                  | -                         | 2BHK                       |
|                             | Mahima group                 | Many          | Nashik              | Commercial                   | Shop                      | -                          |
|                             | Prop1                        | Many          | Surat               | Residential                  | -                         | 1BHK                       |
|                             | Prop2                        | Sunny         | Surat               | Commercial                   | Shop                      | -                          |
| <b>Subtotal</b>             |                              |               |                     |                              |                           |                            |
| <b>Total (4)</b>            |                              |               |                     |                              |                           |                            |

**Loan amount>5000\$**

The screenshot shows the Salesforce Report Builder interface. The report title is "Loans with Property name". The report structure is defined by the following fields:

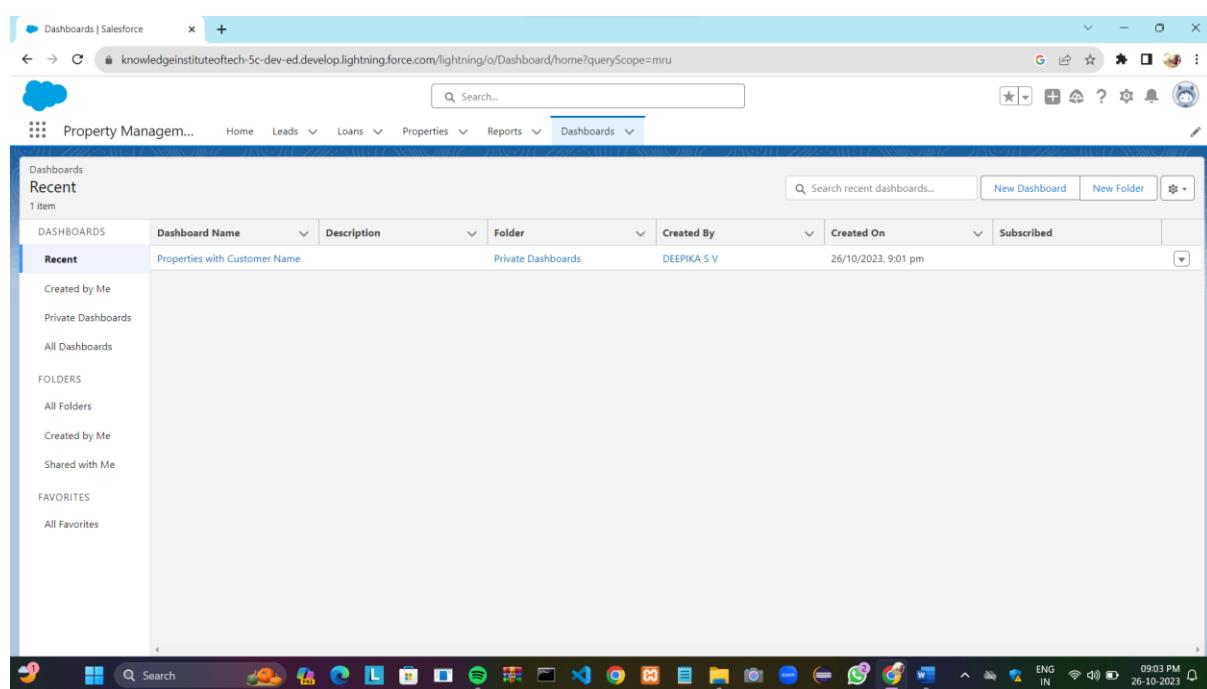
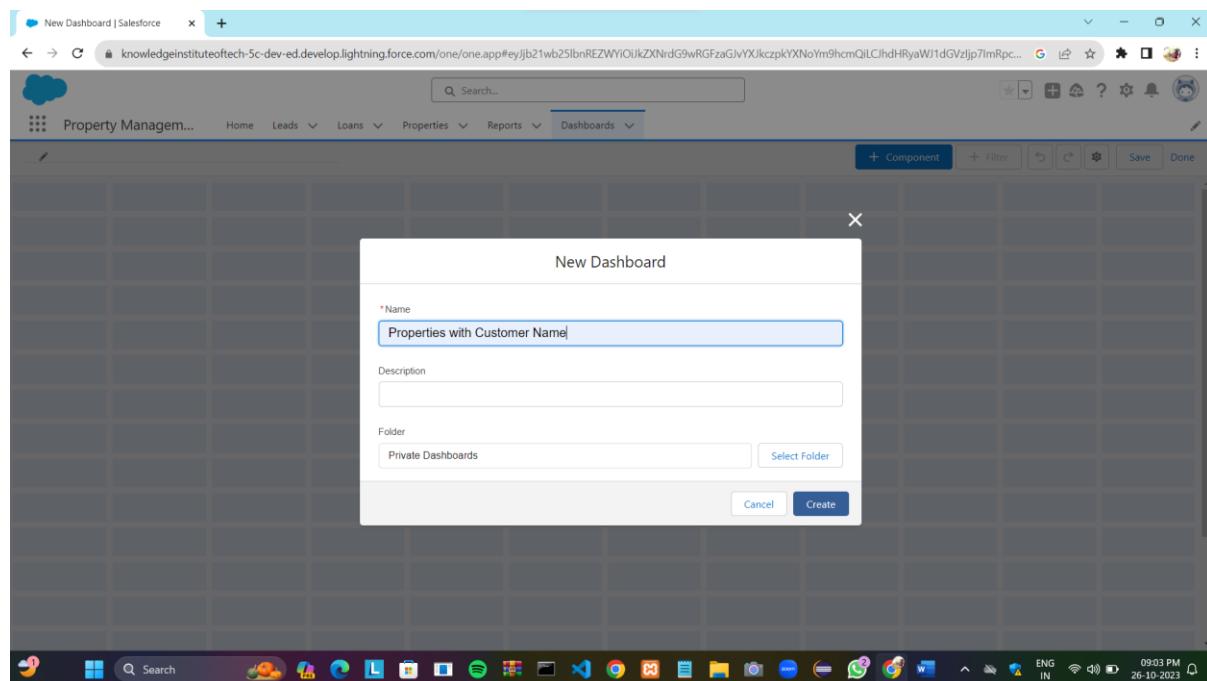
- Groups:** GROUP ROWS, GROUP COLUMNS.
- Fields:** Property name: Property Name, Customer Name, Property name: Record ID, Loan Amount.
- Columns:** Customer Name, Property name: Record ID, # Loan Amount.

The report preview shows the following data:

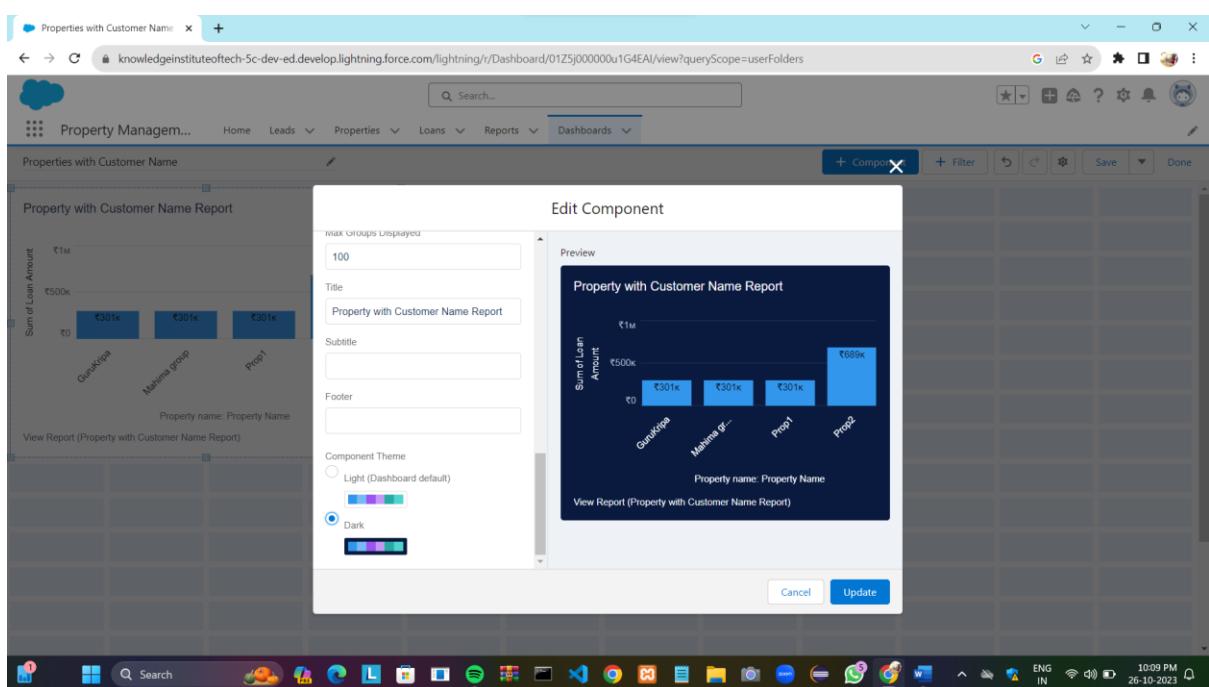
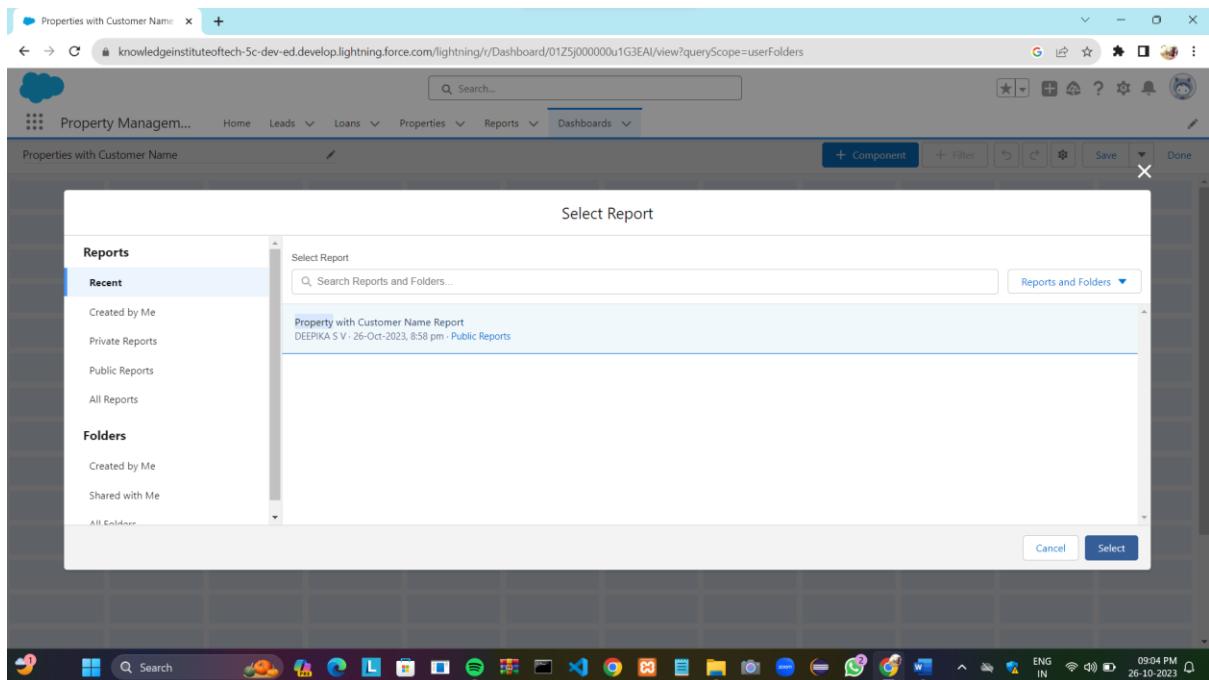
| Property name: Property Name | Customer Name | Property name: Record ID | Loan Amount   |
|------------------------------|---------------|--------------------------|---------------|
| GuruKripa (1)                | Sunny         | a01500000cgj89           | ₹1,01,307.16  |
| <b>Subtotal</b>              |               |                          | ₹1,01,307.16  |
| Mahima group (1)             | Many          | a01500000cgjD            | ₹1,01,307.16  |
| <b>Subtotal</b>              |               |                          | ₹1,01,307.16  |
| Prop1 (1)                    | Many          | a01500000cgjd            | ₹1,01,307.16  |
| <b>Subtotal</b>              |               |                          | ₹1,01,307.16  |
| Prop2 (1)                    | Sunny         | a01500000cgjhB           | ₹6,88,702.09  |
| <b>Subtotal</b>              |               |                          | ₹6,88,702.09  |
| <b>Total (4)</b>             |               |                          | ₹15,92,623.37 |

## 4.2 Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.



## Property Management Application Using Salesforce



## CHAPTER-5

### CONCLUSION

In conclusion, a Property Management Application Using Salesforce offers a powerful solution for property managers, tenants, and property owners. This application leverages the capabilities of the Salesforce platform to streamline property management operations, enhance communication, and improve overall efficiency. By centralizing property data, automating key processes, and providing user-friendly interfaces, it offers a comprehensive and user-friendly experience.

Key characteristics of this application include responsive design, accessibility, user-friendliness, scalability, high performance, and robust reporting and analytics. These characteristics ensure that the application is not only adaptable to different devices and accessible to all users but also capable of handling growing property portfolios with efficiency and providing valuable insights through data analysis.

Furthermore, the application prioritizes data security and compliance, adhering to property management regulations and data protection laws. It also offers integration capabilities, allowing seamless data exchange with external systems, and supports ongoing user training and support for a smooth user experience.

Ultimately, a Property Management Application Using Salesforce represents a sophisticated and adaptable tool for the property management industry, enhancing the way properties are managed, communication is conducted, and data is leveraged for better decision-making. This application simplifies complex tasks and ensures that property management professionals, property owners, and tenants can efficiently and effectively interact with the system, resulting in improved property management and customer satisfaction.

## **CHAPTER-6**

### **PROJECT DEMONSTRATION**

**Github:**<https://github.com/2k20it27/Naan-Mudhalvan-Salesforce-NM2023TMID02190-KIOT.git>

**Demo Link:** <https://drive.google.com/file/d/1dn-4VXjvrQXov8TZA8Lj8bZTsjwTGt4g/view?usp=drivesdk>