



Naan Mudhalvan

Salesforce Developer

PROJECT TITLE: Property Management Application Using Salesforce

TEAM MEMBER

DEEPIKA S V(611220205002)

RAMYA SRI R(611220205027)(TEAM LEAD)

SHRI SHALINI M (611220205033)

TEAJASHREE R (611220205042)

COURSE INSTRUCTOR

Mr.R.AYYAPPAN

COLLEGE SPOC

Mr.T.KARTHIKEYAN






PROJECT GOAL:

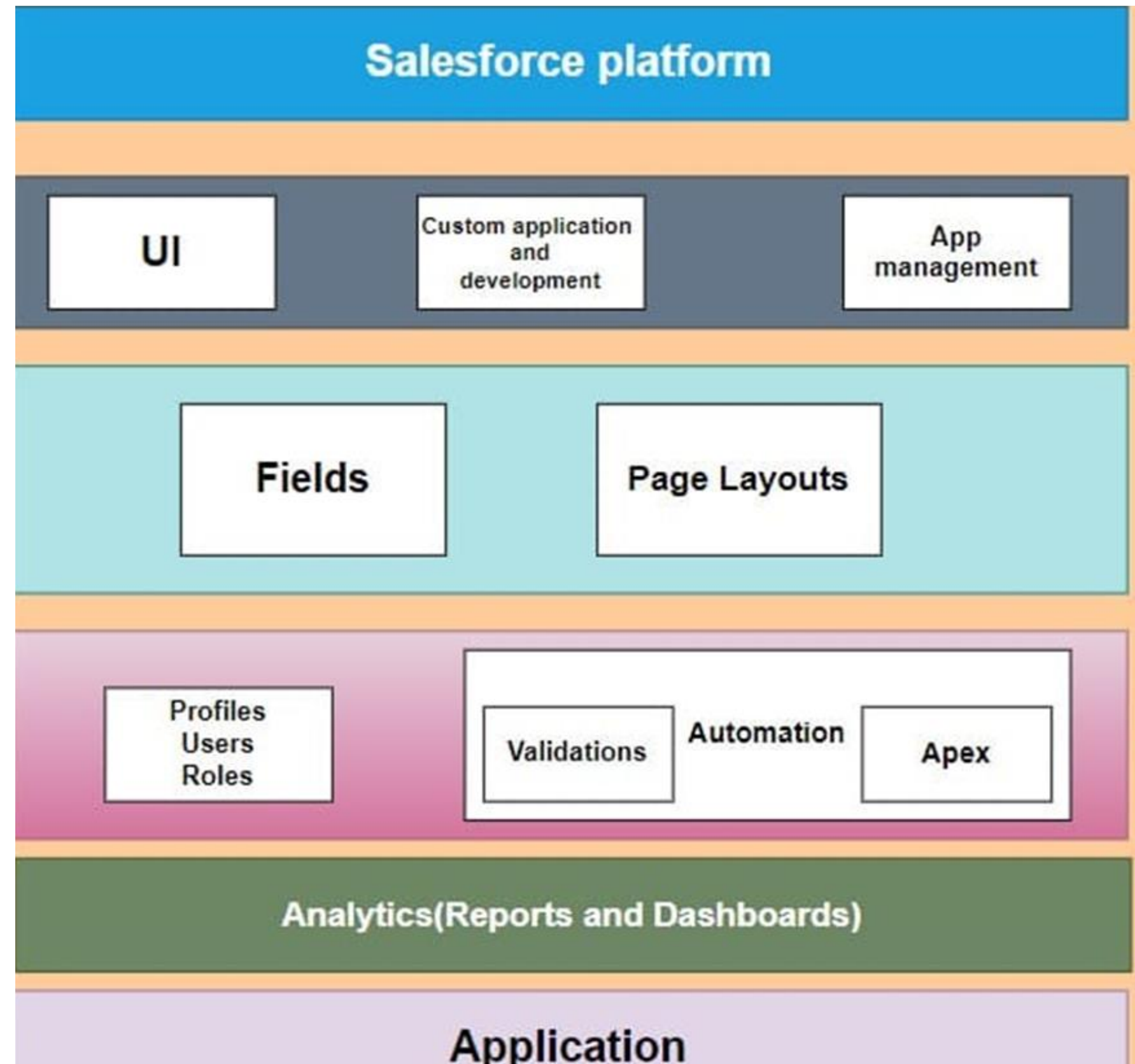
Developing a Property Management Application Using Salesforce represents a significant opportunity to modernize and streamline the property management industry. This project's overarching goal is to enhance the efficiency and effectiveness of property management processes.

PROJECT DESCRIPTION:

Develop an App for the Property Management where Buyer can order his Requirements and get the Appropriate Details of the Property. According to his interest just provide him with some discounts up to what extent he can get the discount. Also Track Whether he is Interested in taking the loan available for so just calculate how much loan Amount user can get it. Provide the Security for two different profiles like for marketing and sales team.



TECHNICAL ARCHITECTURE



SALESFORCE DEVELOPER ORG

Trailhead | Promo Org Signup

trailhead.salesforce.com/promo/orgs/earn-the-screen-flow-specialist-superbadge

SUPERBADGE

Get a free Developer Edition org with special configuration to complete the Flow Elements and Resources Specialist Superbadge.

Use this page to sign up for a special Developer Edition org with configuration you need to complete the superbadge challenges. The Screen Flow Specialist helps you demonstrate your screen flow superpowers.

Note: Superbadges are Salesforce credentials designed to help assess your Salesforce skills and abilities. [Read more](#) about how the Salesforce Certification Program Agreement and Policies applies to superbadges.

☐ By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#)

* First Name: DEEPIKA * Last Name: S V

* Email address: 2k20t02@kiot.ac.in

* Role: Developer

* Company: KNOWLEDGE INSTITUTE OF TECHNOLOGY

* Country: India

* Postal Code: 636 111

* Username: deepikasv@kiot.com

Trailhead | Promo Org Signup

trailhead.salesforce.com/promo/orgs/earn-the-screen-flow-specialist-superbadge

Use this page to sign up for a special Developer Edition org with configuration you need to complete the superbadge challenges. The Screen Flow Specialist helps you demonstrate your screen flow superpowers.

Note: Superbadges are Salesforce credentials designed to help assess your Salesforce skills and abilities. [Read more](#) about how the Salesforce Certification Program Agreement and Policies applies to superbadges.

* Role: Developer

* Company: KNOWLEDGE INSTITUTE OF TECHNOLOGY

* Country: India

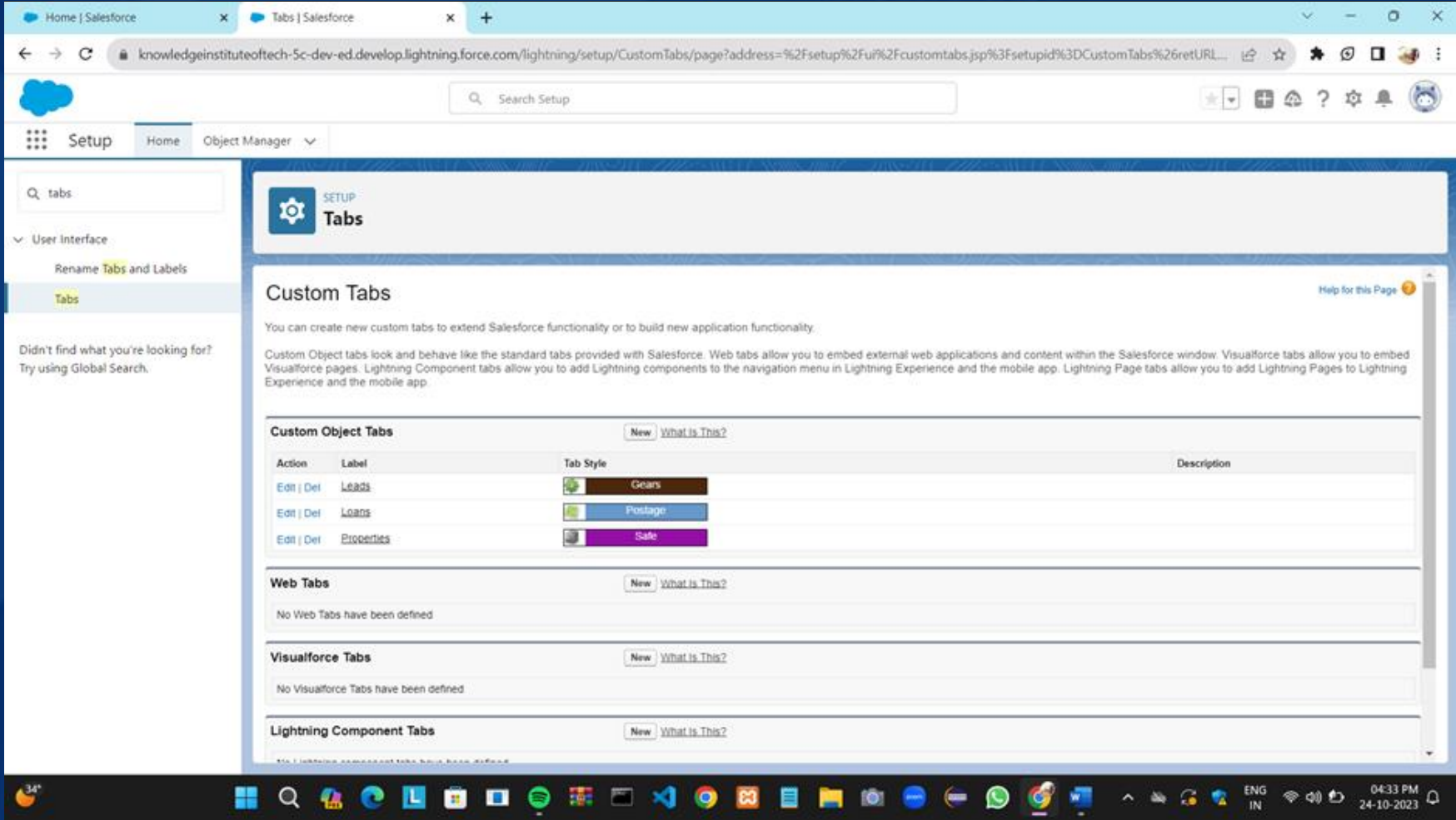
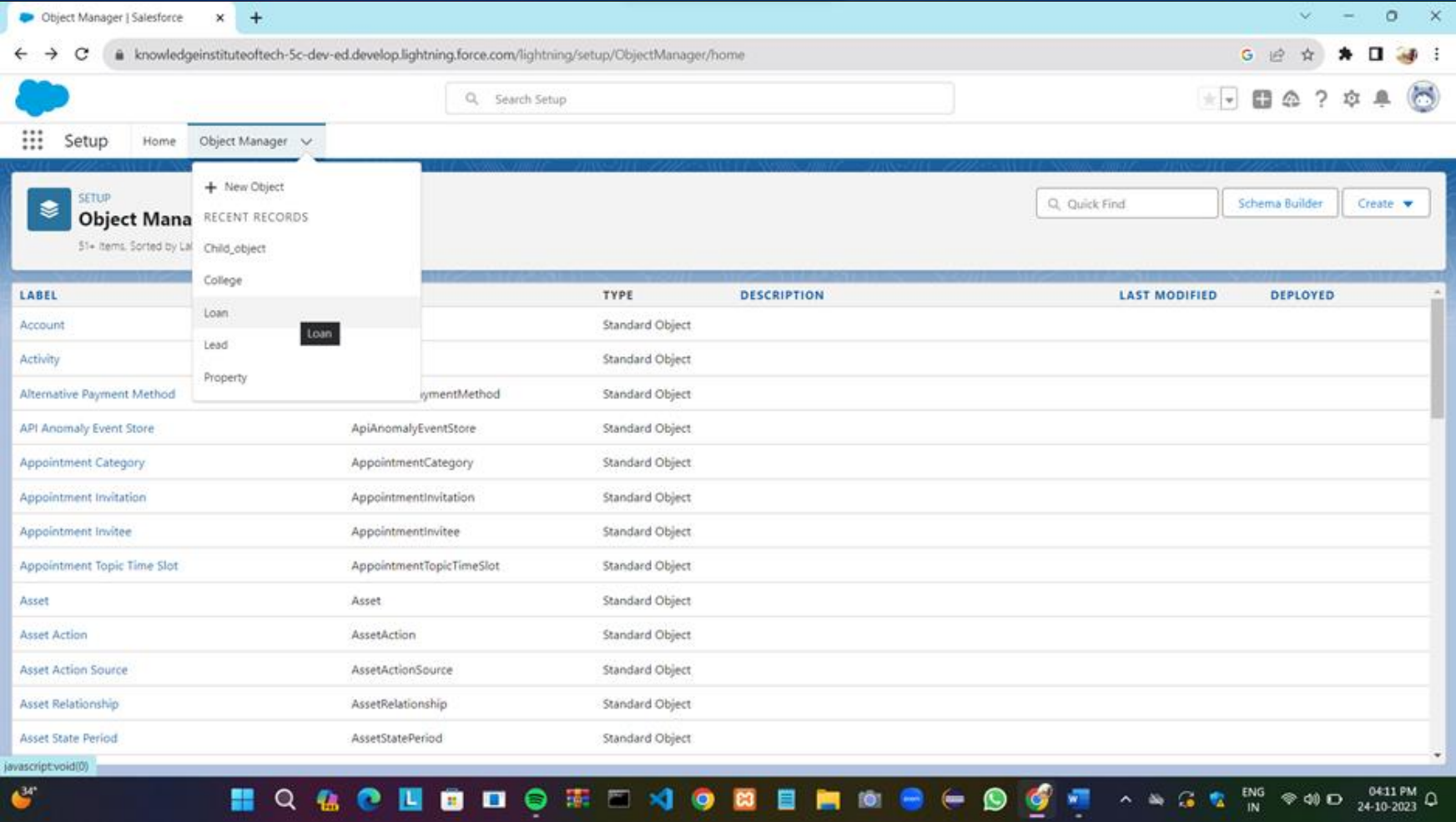
* Postal Code: 636 111

* Username: deepikasv@kiot.com

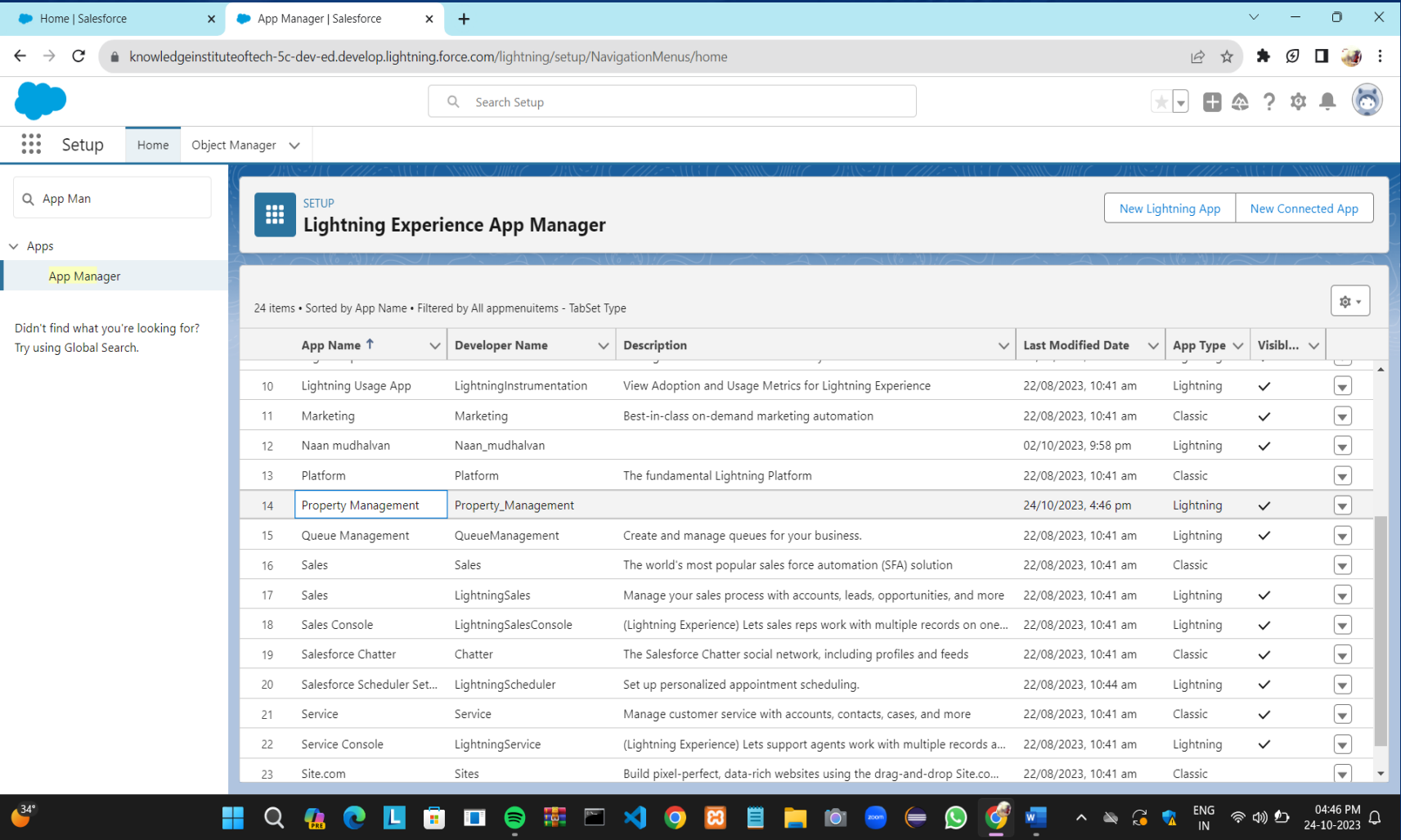
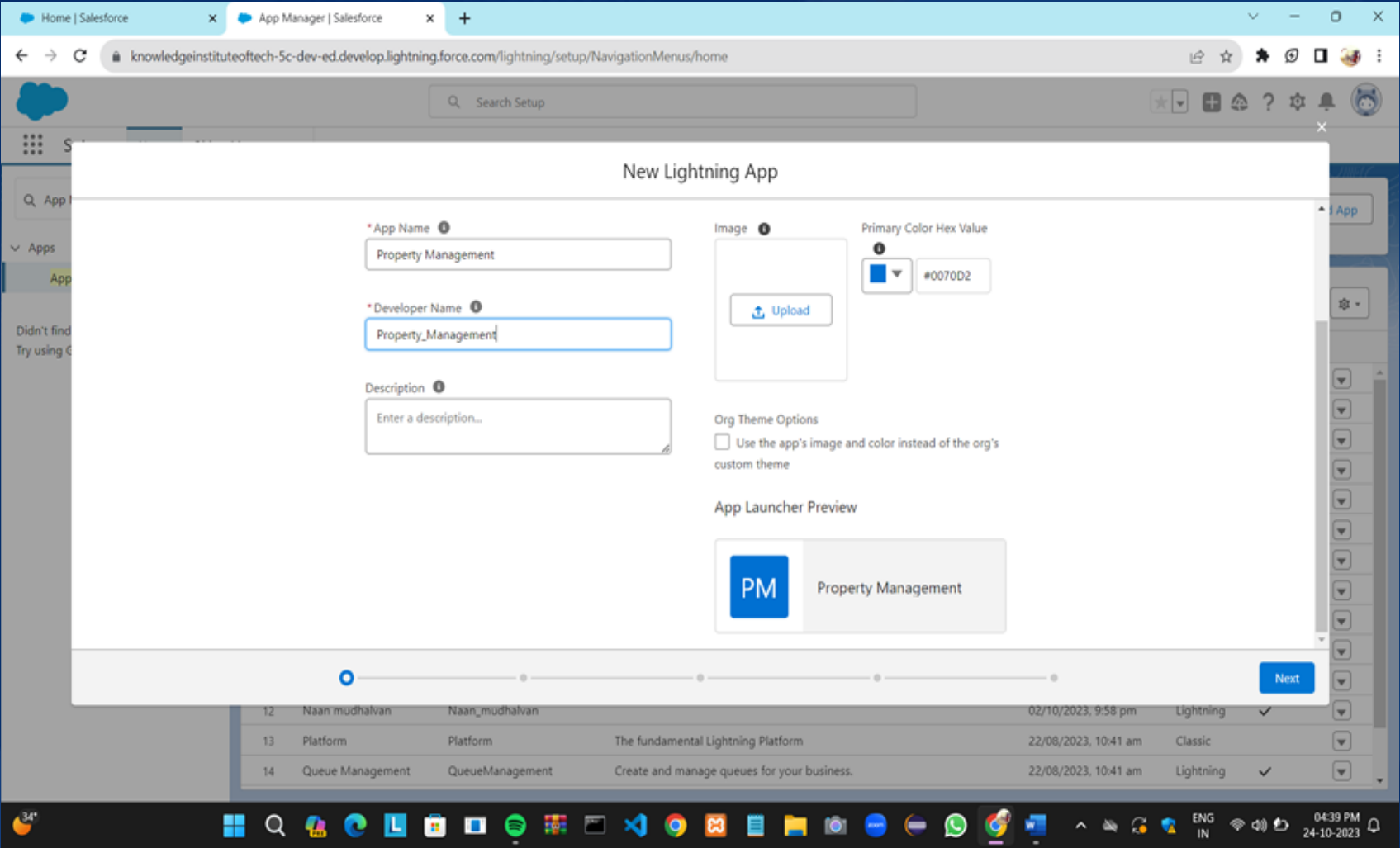
☒ By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and agree that my data is subject to the [Privacy Statement](#), including use for marketing purposes.*

Sign me up >

CUSTOM OBJECT CREATION & TABS



LIGHTNING APP



USER CREATION

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains navigation links for Users, Feature Settings, and Data.com. The main content area displays the details for a user named Sunny Gupta, including their Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, and various system settings like Role, User License, Profile, Active status, and Marketing User options.

Users | Salesforce

knowledgeinstituteoftech-5c-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000A4rM%3Fnoredirect%3D1%26isUserEntityOverride%3D1

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP Users

User Profile Help for this Page

User Sunny Gupta

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Memberships (0) | Queue Memberships (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail Edit Sharing Reset Password Freeze

Name	Sunny Gupta	Role	
Alias	Sanj	User License	Salesforce
Email	2k20t02@kiof.ac.in [Verify]	Profile	Sales Manager
Username	sunnygupta@thesmartbridge1.com	Active	<input checked="" type="checkbox"/>
Nickname	Sunny	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	4/300 Balaji Nagar,M Perumapalayam(P.O),Valappady(T.K),Salem(D.T), SALEM 636 111 TAMIL NADU India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>

FLOWS

Email Alert - V1

knowledgeinstituteoftech-5c-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015j000002Amh5AAC

Flow Builder Email Alert - V1

Select Elements

Auto-Layout Version 1: Active—Last modified 22 minutes ago Run Debug View Tests Deactivate Save As Save

Start
Record-Triggered Flow

Object: **Loan** Edit

Trigger: **A record is created or updated**

Conditions: **1**

Optimize for: **Actions and Related Records**

Scheduled Paths: **5** Edit

[Open Flow Trigger Explorer for Loan](#)

Within 5 days

Decision for the 5 days Decision

Don't send the Email End

Send Email 5 Days Before Email Alert

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object
Loan

Configure Trigger

* Trigger the Flow When:

- ☐ A record is created
- ☐ A record is updated
- ☒ A record is created or updated
- ☐ A record is deleted

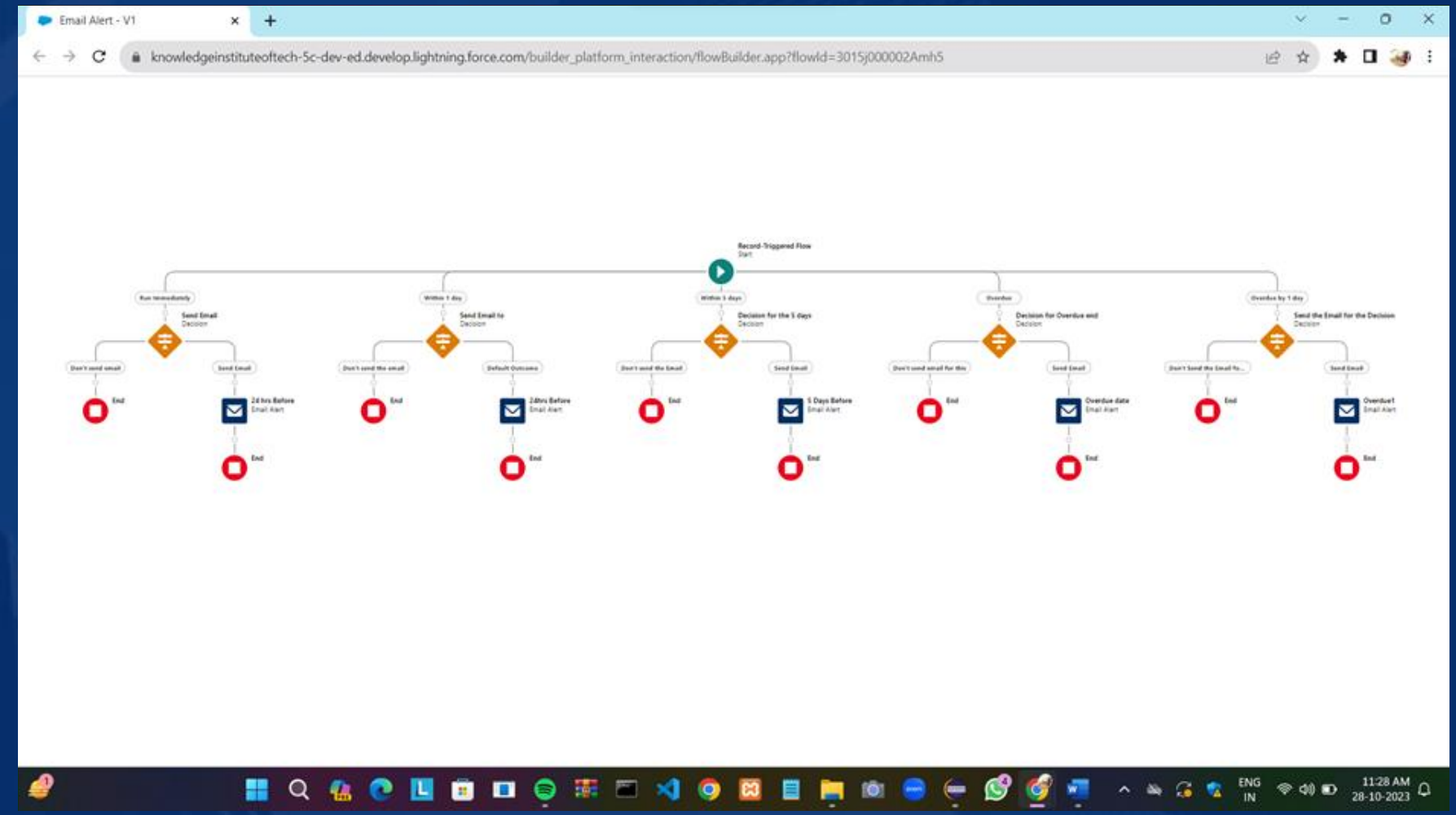
Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
All Conditions Are Met (AND)

Field Due_Date__c Operator Is Null Value False X



REPORTS AND DASHBOARD

The screenshot shows the Salesforce Report Builder interface. The report is titled 'Property with Customer Name Report' and is currently in 'Preview' mode. The report is a table with the following columns: Property name: Property Name, Customer Name, Property name: Record ID, and Loan Amount. The data is grouped by Property name. The table shows records for 'GuruKripa (1)', 'Mahima group (1)', and 'Prop1 (1)'. The 'Loan Amount' column shows values in Indian Rupees (₹). The 'Total (4)' row shows a grand total of ₹15,92,623.57.

Property name: Property Name	Customer Name	Property name: Record ID	Loan Amount
GuruKripa (1)	Sunny	a015j00000cpjb9	₹3,01,307.16
Subtotal			₹3,01,307.16
Mahima group (1)	Marry	a015j00000cpjcD	₹3,01,307.16
Subtotal			₹3,01,307.16
Prop1 (1)	Marry	a015j00000cpjpd	₹3,01,307.16
Subtotal			₹3,01,307.16
Prop2 (1)	Sunny	a015j00000cpjhb	₹6,88,702.09
Subtotal			₹6,88,702.09
Total (4)			₹15,92,623.57

The screenshot shows the Salesforce Report Builder interface with a bar chart report titled 'Property with Customer Name Report'. The report is currently in 'Edit Component' mode. The chart displays the 'Sum of Loan Amount' for different property names. The Y-axis represents the 'Sum of Loan Amount' in Indian Rupees (₹), ranging from 0 to ₹100k. The X-axis represents the 'Property name: Property Name'. The chart shows four bars: 'GuruKripa' (₹301k), 'Mahima group' (₹301k), 'Prop1' (₹301k), and 'Prop2' (₹688k). The 'Edit Component' dialog box is open, showing options to configure the report, including the title, subtitle, footer, and component theme (Light or Dark).

Property name: Property Name	Sum of Loan Amount
GuruKripa	₹301k
Mahima group	₹301k
Prop1	₹301k
Prop2	₹688k



Thank You