PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

Submitted by

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Team ID: NM2023TMID19279

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Guest Lecture

PG & Research Department of Mathematics

M.V.Muthiah Government Arts College For Women

INTRODUCTION

Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. 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. A property management system is sometimes referred to as a hotel operating system or hotel OS.

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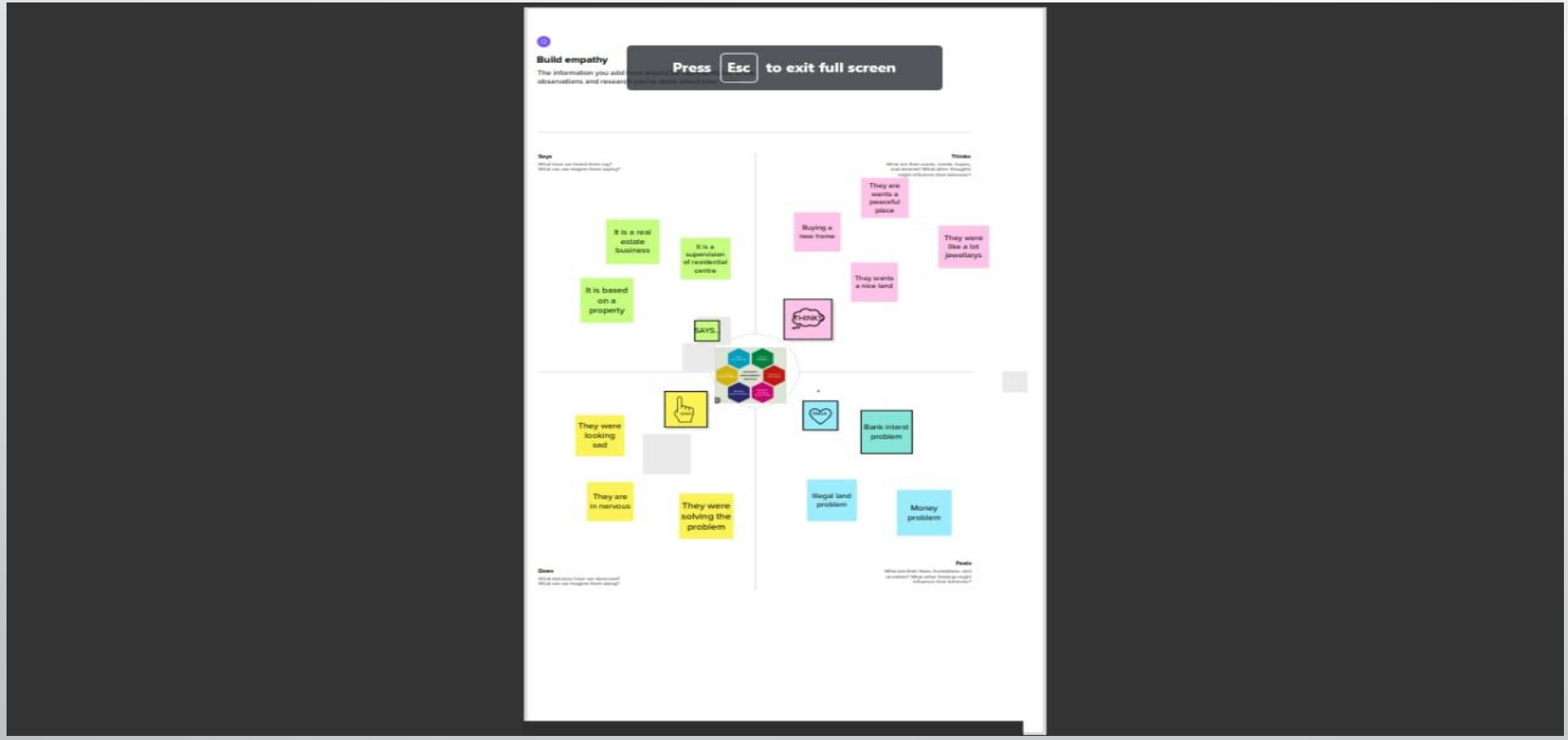
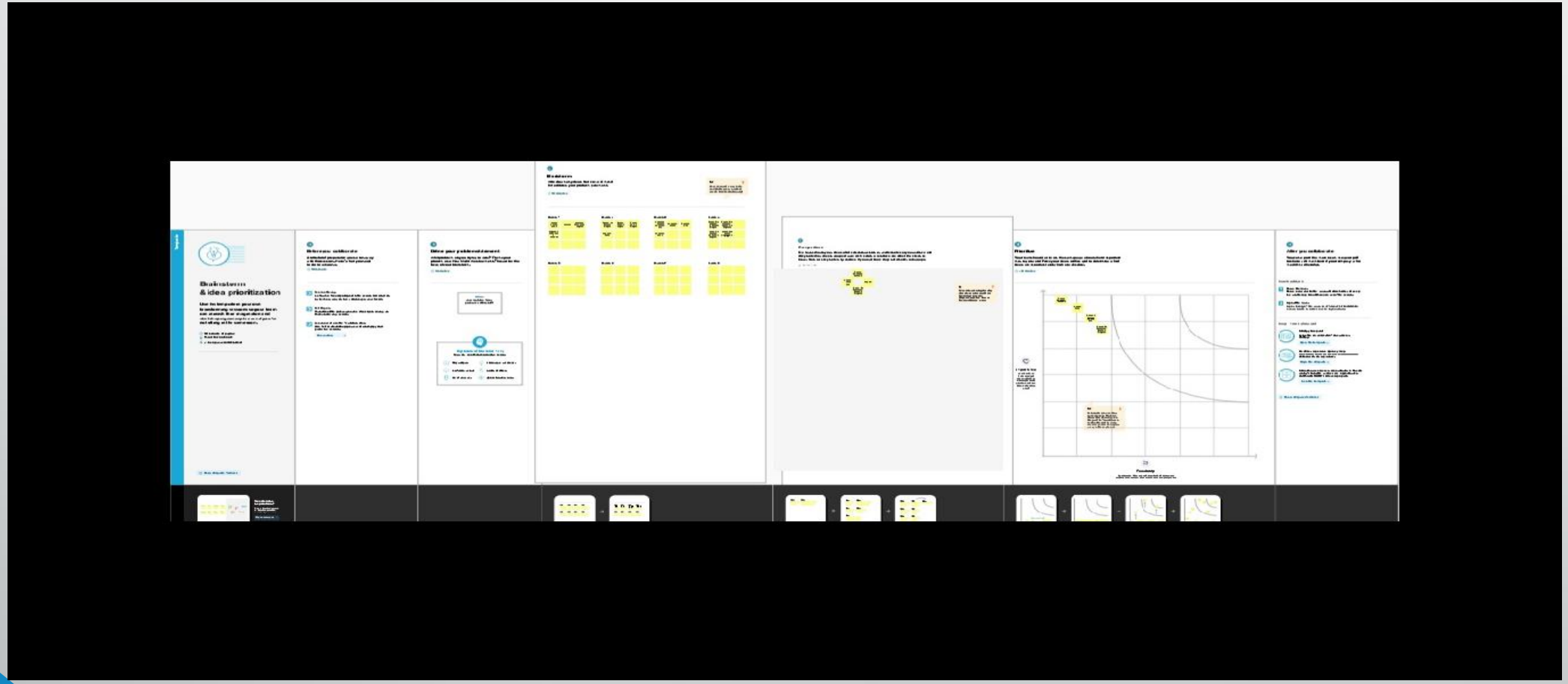
EMPATHY MAP


Build empathy
Press Esc to exit full screen
They are wants a peaceful place
Buying a new home
They were like a lot jewellarys
It is a real estate business
It is a supervision of residential centre
They wants a nice land
It is based on a property
THINK
SAYS
They were looking sad
Bank interst problem
Illegal land problem
Money problem
They are in nervous
They were solving the problem

IDEATION AND BRAINSTORMING MAP



SALESFORCE

Creating Developer Account Creating a developer org in salesforce.

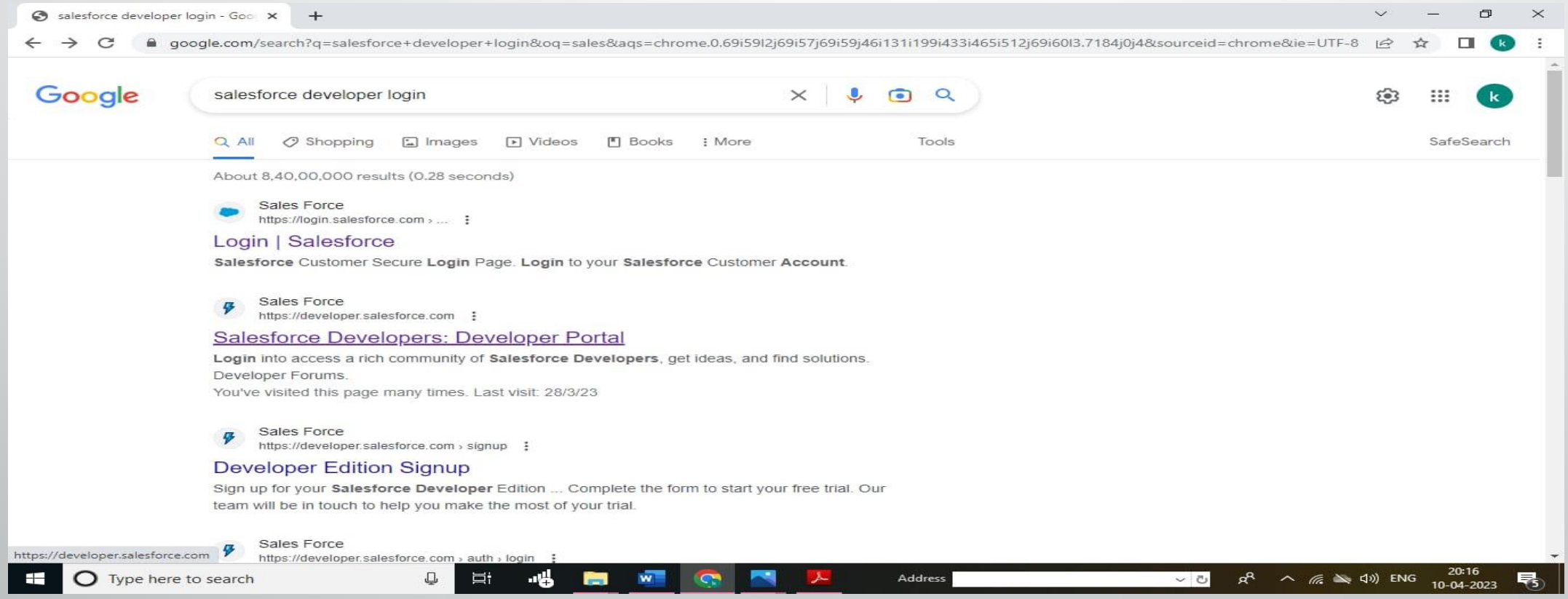
1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :

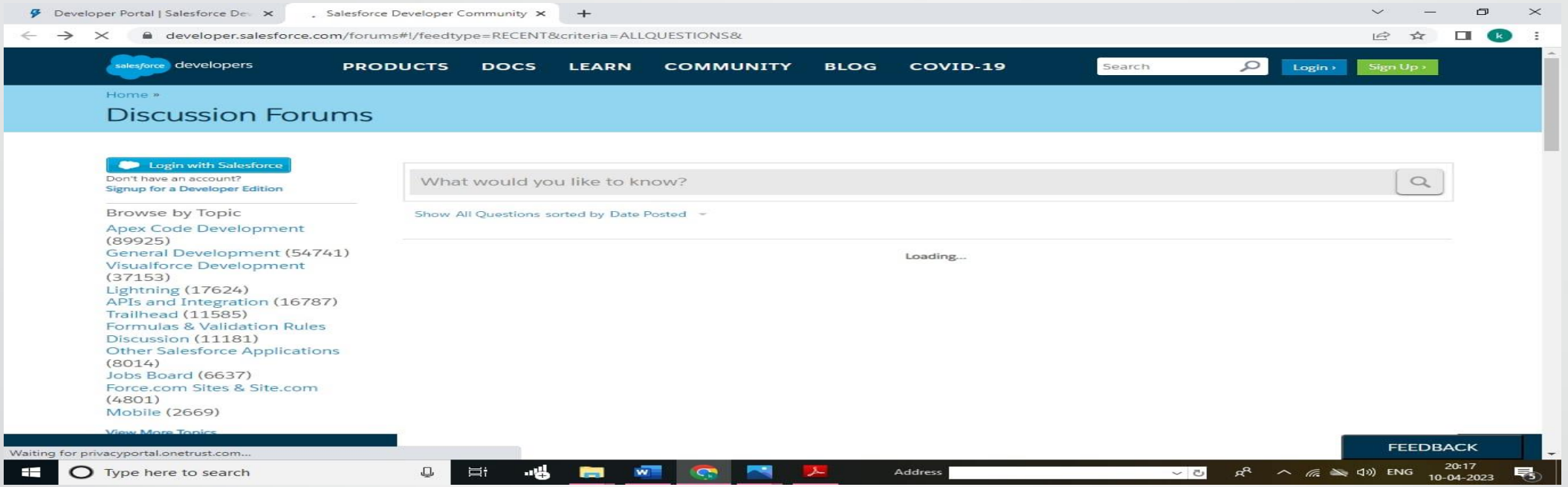
a. First name & Last name
b. Email
c. Role : Developer
d. Company : College Name
e. County : India
f. Postal Code : pin code
g. Username :

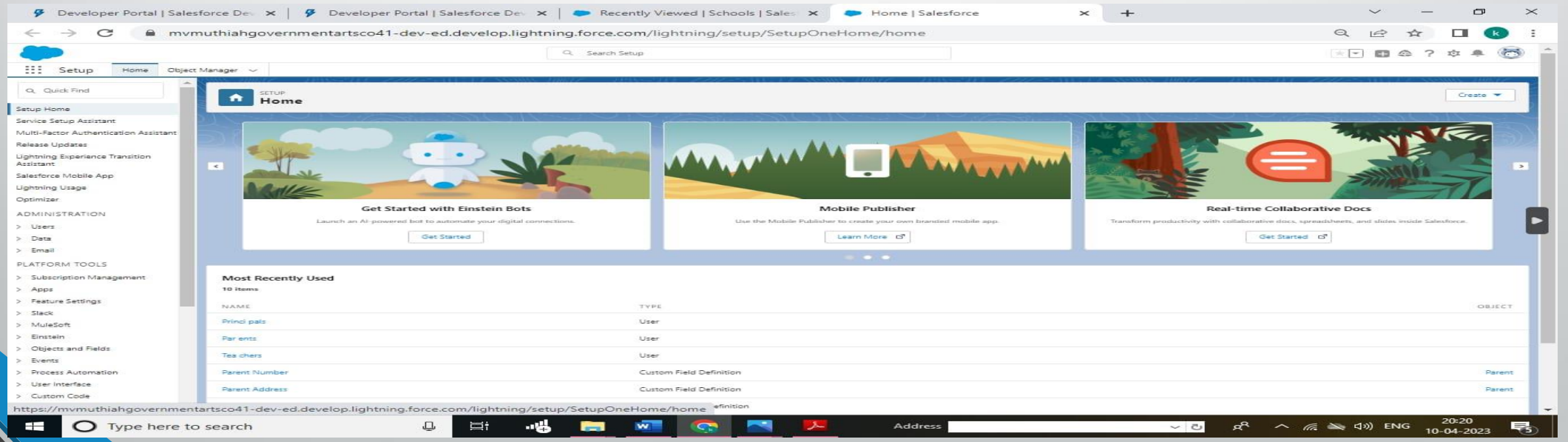
should be a combination of your name and company This need not be an actual email id, you can give anything in the format : username@organization.com Click on sign up after filling these

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. Login To Your Salesforce Account




Developer Portal | Salesforce De
Salesforce Developer Community
developer.salesforce.com/forums#!/feedtype=RECENT&criteria=ALLQUESTIONS&
salesforce developers
PRODUCTS
DOCS
LEARN
COMMUNITY
BLOG
COVID-19
Search
Login ›
Sign Up ›
Home »
Discussion Forums
Login with Salesforce
Don't have an account?
Signup for a Developer Edition
Browse by Topic
Apex Code Development (89925)
General Development (54741)
Visualforce Development (37153)
Lightning (17624)
APIs and Integration (16787)
Trailhead (11585)
Formulas & Validation Rules Discussion (11181)
Other Salesforce Applications (8014)
Jobs Board (6637)
Force.com Sites & Site.com (4801)
Mobile (2669)
View More Topics
What would you like to know?
Show All Questions sorted by Date Posted
Loading...
FEEDBACK
Waiting for privacyportal.onetrust.com...
Type here to search
Address
ENG
20:17
10-04-2023


Developer Portal | Salesforce De
Developer Portal | Salesforce De
Recently Viewed | Schools | Sales
Home | Salesforce
mvmuthiahgovernmentartsco41-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home
Setup
Home
Object Manager
Search Setup
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
Objects and Fields
Events
Process Automation
User Interface
Custom Code
SETUP
Home
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
10 items
NAME
TYPE
OBJECT
Princi pals
User
Par ents
User
Tea chers
User
Parent Number
Custom Field Definition
Parent
Parent Address
Custom Field Definition
Parent
https://mvmuthiahgovernmentartsco41-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home
Type here to search
Address
ENG
20:20
10-04-2023

OBJECTS

Objects

To Navigate to Setup page:

1. Click on gear icon → click setup

To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

On Custom object defining page:

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

Create Object Buy

1. To create an object
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name→Buy
4. plural label name→ Buyers
5. click on Allow reports
6. Allow search →Save

Create Object Rent

1. To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

3. Enter the label name→Rent

4. plural label name→ Rents

5. click on Allow reports,

6. Allow search →Save

Create Object Loan

7. To create an object:

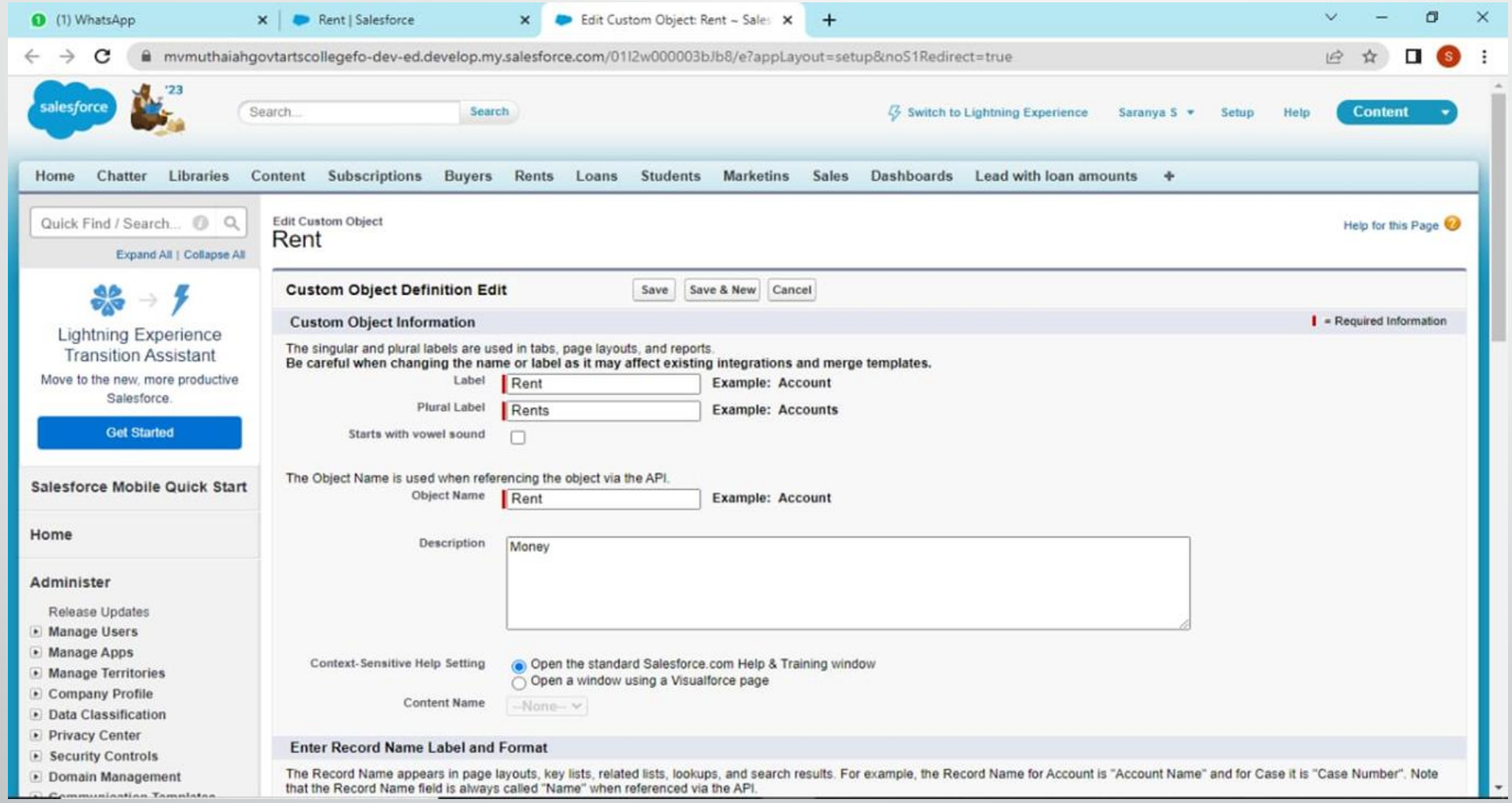
8. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object

. 9. Enter the label name→Loan

10.plural label name→ Loans

11. click on Allow reports,

12.Allow search →Save


(1) WhatsApp
Rent | Salesforce
Edit Custom Object: Rent ~ Sales
mvmuthaiahgovtartscollegefo-dev-ed.develop.my.salesforce.com/01I2w000003bJb8/e?appLayout=setup&noS1Redirect=true
salesforce
'23
Search...
Search
Switch to Lightning Experience
Saranya S
Setup
Help
Content
Home
Chatter
Libraries
Content
Subscriptions
Buyers
Rents
Loans
Students
Marketins
Sales
Dashboards
Lead with loan amounts
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Edit Custom Object
Rent
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Rent
Example: Account
Plural Label
Rents
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Rent
Example: Account
Description
Money
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

TAB

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.

To create a Tab:(Buy)

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

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

To create a Tab:(Rent)

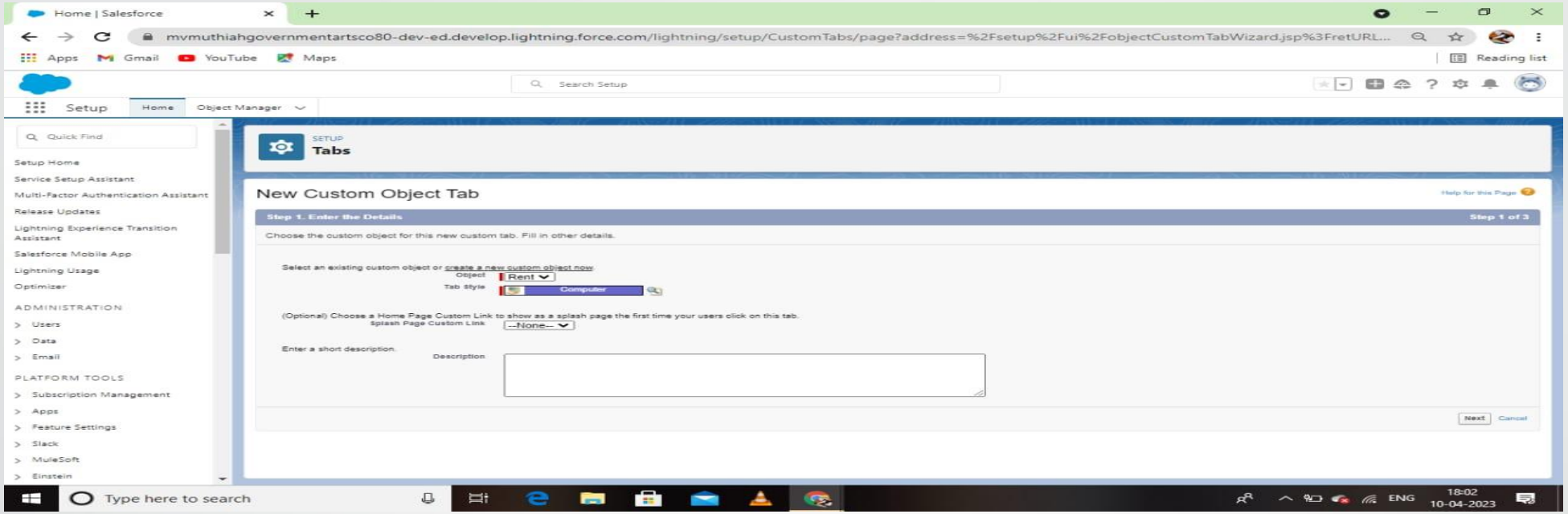
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)

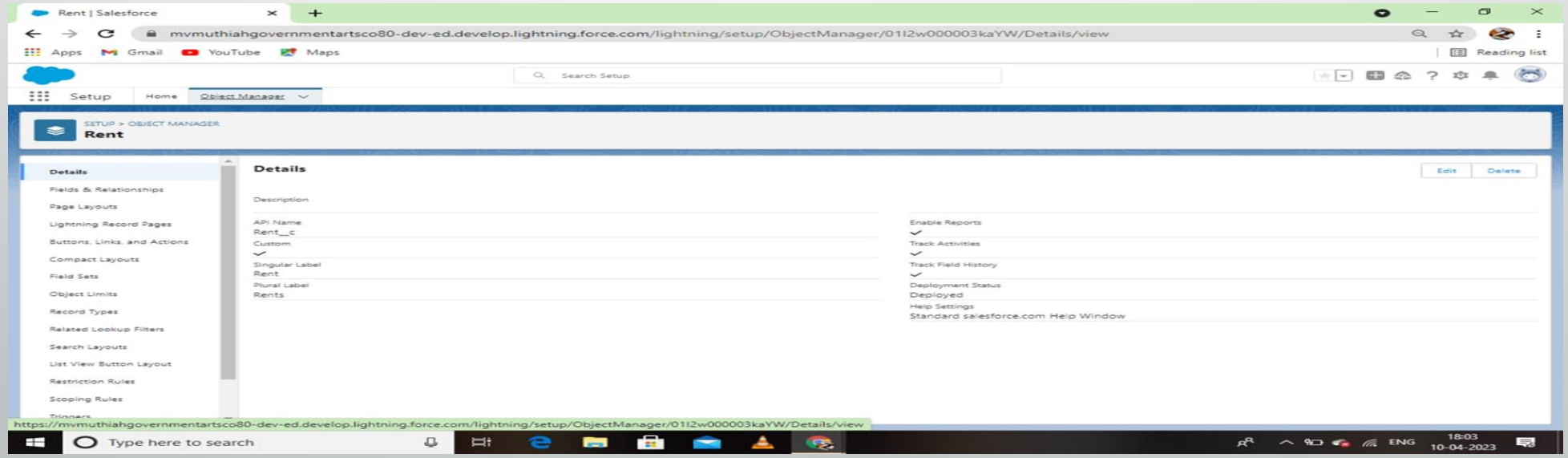
2. Select Object(Rent) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save

To create a Tab:(Loan)

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

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


Home | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...
Apps
Gmail
YouTube
Maps
Reading list
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
SETUP
Tabs
New Custom Object Tab
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Rent
Tab Style
Computer
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel
Type here to search
ENG
18:02
10-04-2023


Rent | Salesforce
mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kaYW/Details/view
Apps
Gmail
YouTube
Maps
Reading list
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
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Details
Edit
Delete
Description
API Name
Rent__c
Custom
Singular Label
Rent
Plural Label
Rents
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
https://mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kaYW/Details/view
Type here to search
ENG
18:03
10-04-2023

THE LIGHTNING APP

Create the Lightning App

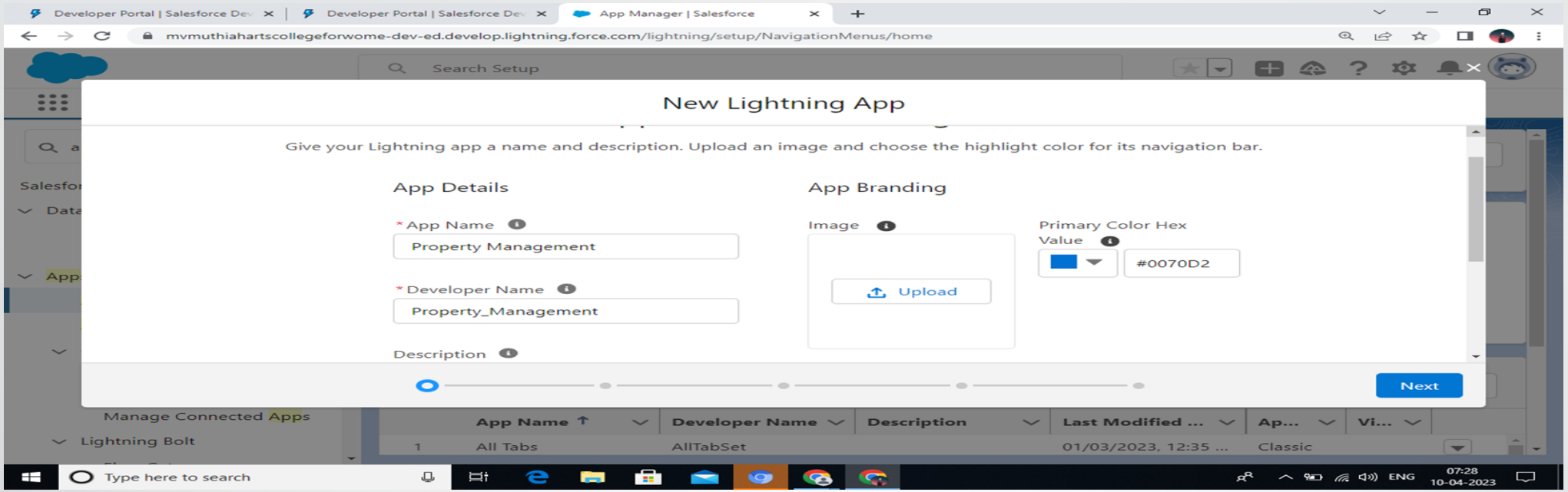
1.Go to setup page → search "app manager" in quick find → select "app manager" → click on New lightning

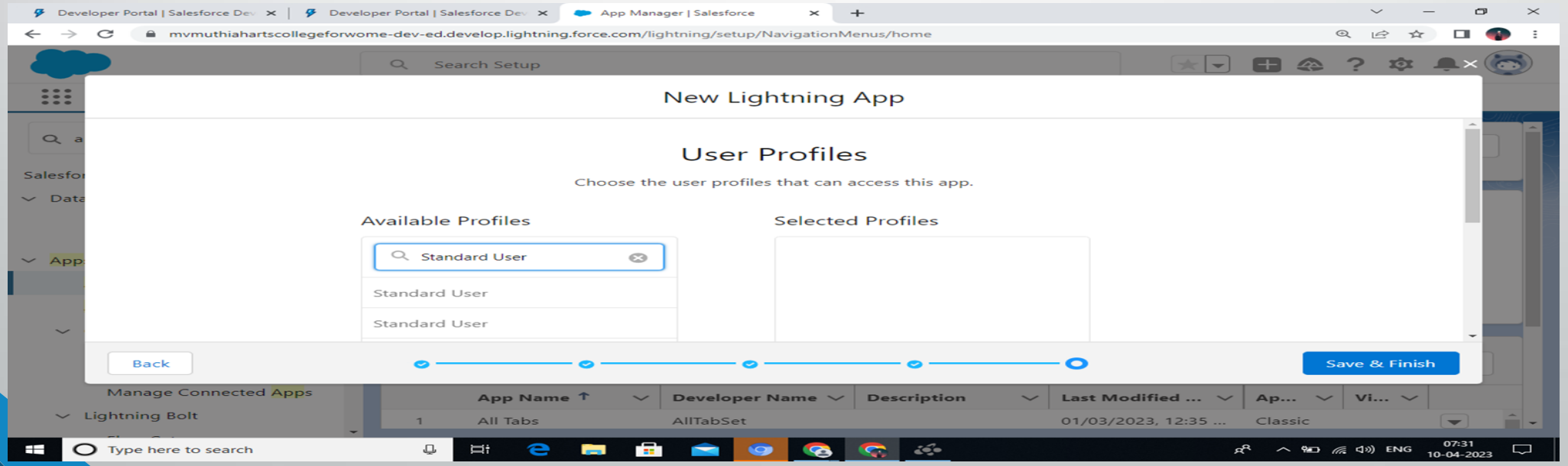
2. Fill the app name as an Property Management in app details and branding →Next → (App option page) keep it as default → Next

3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform user, Standard User →Next

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

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


Developer Portal | Salesforce Dev
Developer Portal | Salesforce Dev
App Manager | Salesforce
mvmuthiahartscollegeforwome-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
New Lightning App
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
*App Name
Property Management
*Developer Name
Property_Management
Description
Image
Upload
Primary Color Hex Value
#0070D2
Next
Manage Connected Apps
Lightning Bolt
App Name
Developer Name
Description
Last Modified ...
Ap...
Vi...
1
All Tabs
AllTabSet
01/03/2023, 12:35 ...
Classic
Type here to search
ENG
07:28
10-04-2023


Developer Portal | Salesforce Dev
Developer Portal | Salesforce Dev
App Manager | Salesforce
mvmuthiahartscollegeforwome-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Selected Profiles
Standard User
Standard User
Standard User
Back
Save & Finish
Manage Connected Apps
Lightning Bolt
App Name
Developer Name
Description
Last Modified ...
Ap...
Vi...
1
All Tabs
AllTabSet
01/03/2023, 12:35 ...
Classic
Type here to search
ENG
07:31
10-04-2023

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
3. Fill the field label name Lead → Next → Next → Save

Create the remaining Fields:

Follow the Above Steps to create the Field just change the Labels for Below Fields

Lead:(AutoNumber Created Field while creating Object)→L-{0000}

State: Create the Picklist Field (Maharashtra, Gujarat,Rajasthan)(Field Dependency)

City: Create the Picklist(Mumbai, Pune, Nashik)(FieldDependency)

Email: Create the Email Select the Data Type As Email (Email)

Phone: Select the Field Data type as (Phone)

In the Fields and Relationship go to the Field Dependencies

For Object Buy

1. Create Field for Buy

2. **Create Property Type**: (Picklist) (Residential, Commercial, Industrial)

3. **Discount:**(Percentage As the Field Data Type)

4. **State:** Create the Picklist Field (Maharashtra, Gujarat,Rajasthan)(Field Dependency)

6. **Annual Amount To Be Paid**

5. **City**:(Take Any City for Field Dependency)

Create Field for Rent

1. **Rent**:(Auto Number while Creating the object)⟶ R-{0000}

2. **Rental City**: Select the Text as the Field Data Name(Any City)

3. **BHK type**:(Picklist)(1BHK, 2BHK,3BHK)

Create Field for Loan

1. **Loan Id**: Auto generated Field Take it as Auto number LN-{0000}

2. **Interest Rate**: (Select the Field Data Type As Currency)

3. **Term**:(Select the Field Data type as Number)

4. **Annual Loan** :Field create the Number as the field datatype

5. **Total Loan Instalments**:(Field create the Number as the field data type)

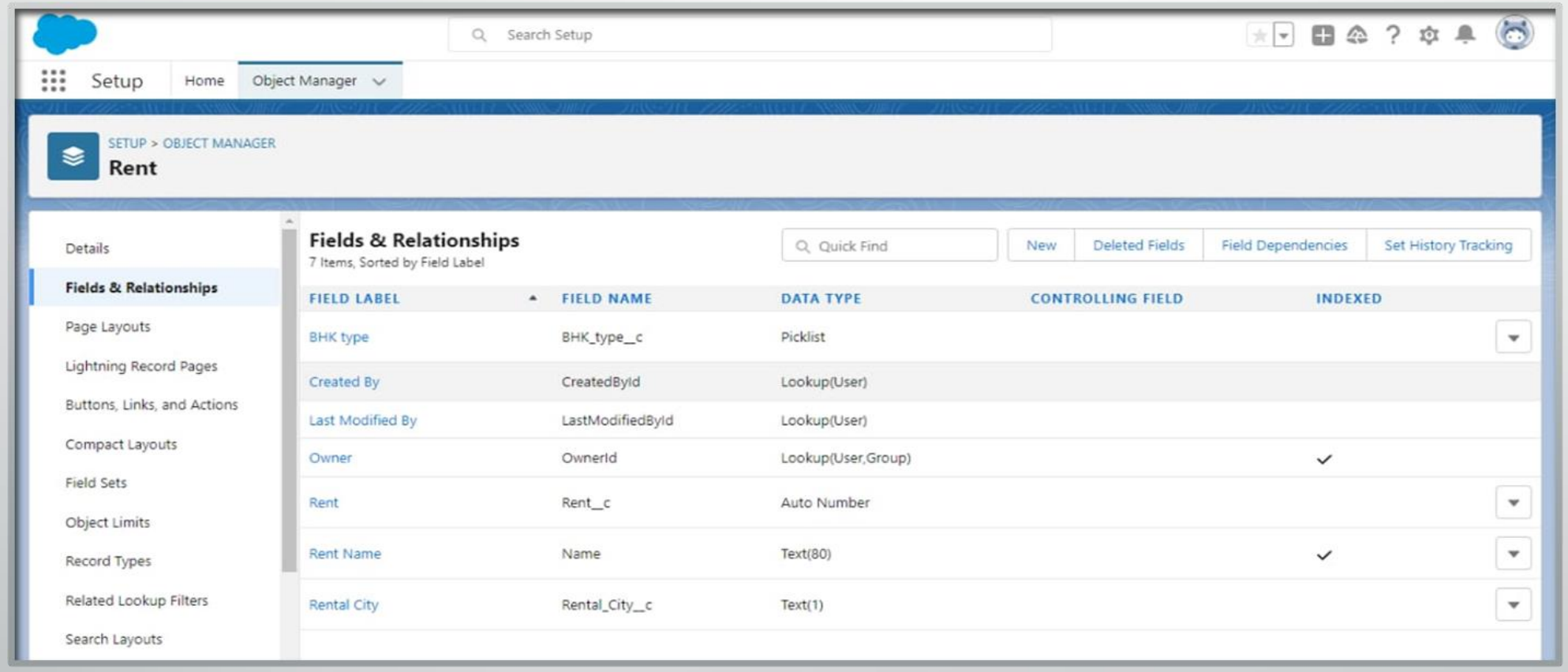
6. **Loan Repayment**(Field create the Number as the field data type)

7. **Loan Amount:**(Select the Field data type as Formula)

8. For the Loan Object→Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula

(Loan_Repayment__c * (((1+(Interest_rate__c/52))^ Term__c) -1))/((Interest_rate__c /52)*((1+(Interest_rate__c /52))^ Term__c))

##Check the syntax below whether the formula syntax is correct or not


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
Search Layouts
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
BHK type
BHK_type__c
Picklist
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Rent
Rent__c
Auto Number
Rent Name
Name
Text(80)
Rental City
Rental_City__c
Text(1)

PROFILES

To create a new profile:

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (standard user is preferable) → enter profile name → save

2. .Enter a Profile Name

Click on the new created profile

4. While still on the profile page, then click

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

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

Create Marketing

1. Then In The Profile Level Give Read and Create Access to Marketing Executive and Read, Create, Edit, Delete for the Marketing manager

2. Marketing Manager Should Have Access to Marketing Executive

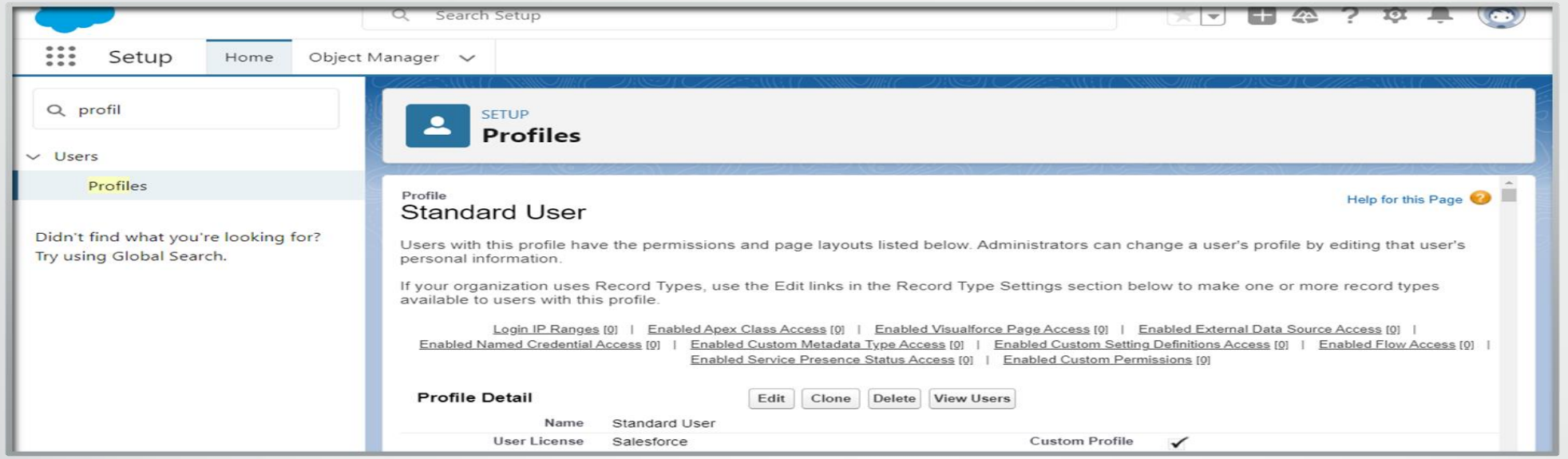
Sales:

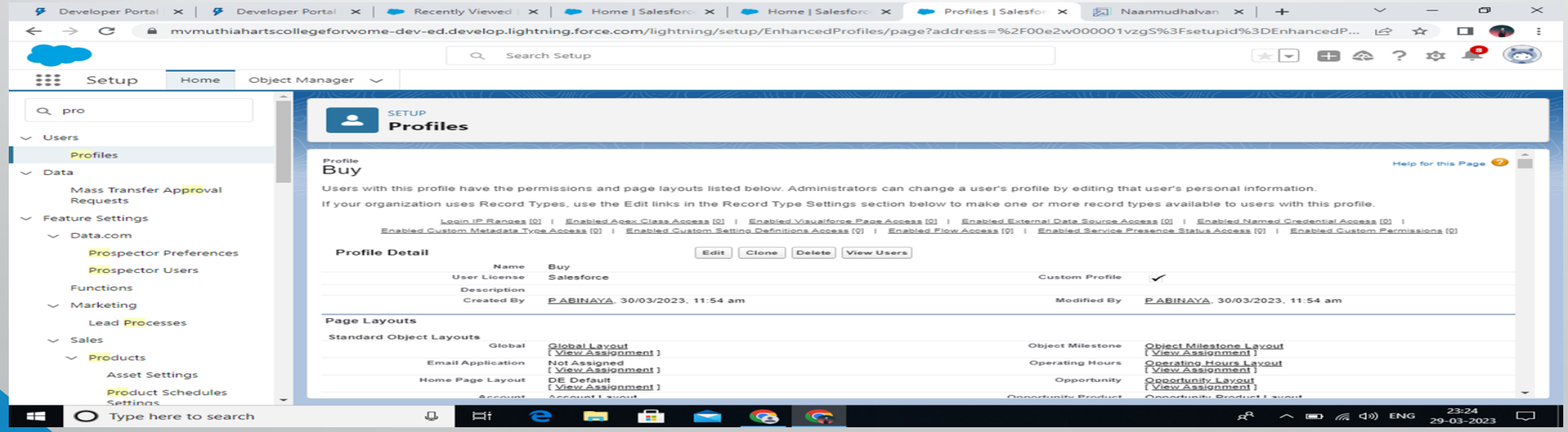
1. In the Profile Level Sales Manager is Having Create,

2. For Sales Rep1→ Read, Create, Edit

3. For Sales Rep2→Read, Create, Edit

4. For Sales Rep3→ Read only Edit, Delete


Search Setup
Setup
Home
Object Manager
profil
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile
Standard User
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
Standard User
User License
Salesforce
Custom Profile

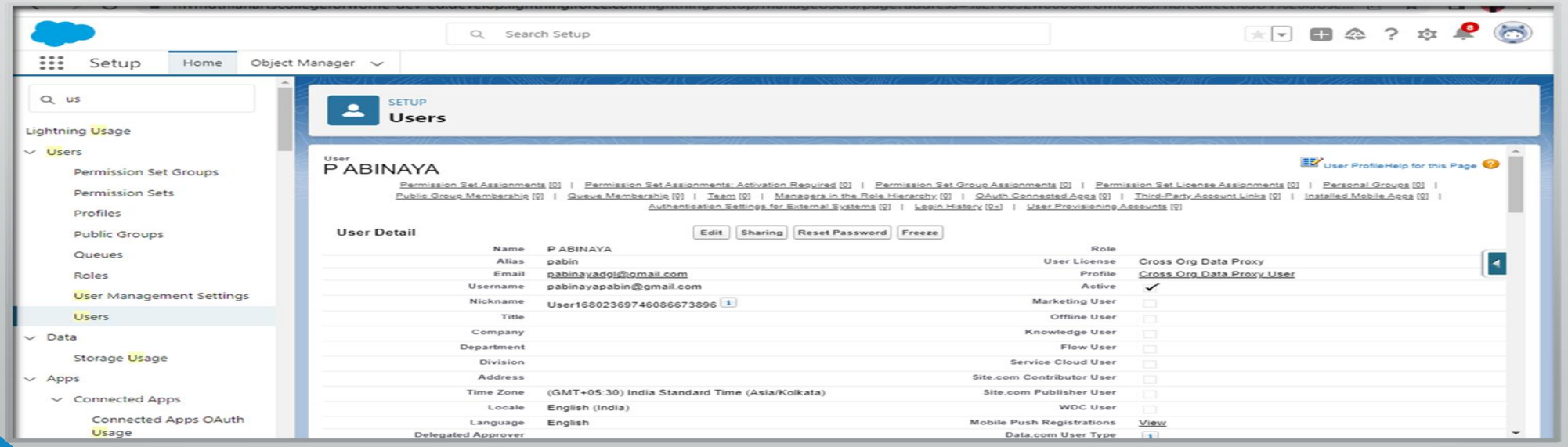

Developer Portal
Recently Viewed
Home | Salesforce
Profiles | Salesforce
Naanmudhalvan
mvmuthiahartscollegeforwome-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000001vzgS%3Fsetupid%3DEnhancedP...
Search Setup
Setup
Home
Object Manager
pro
Users
Profiles
Data
Mass Transfer Approval Requests
Feature Settings
Data.com
Prospector Preferences
Prospector Users
Functions
Marketing
Lead Processes
Sales
Products
Asset Settings
Product Schedules
SETUP
Profiles
Profile
Buy
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.
Profile Detail
Edit
Clone
Delete
View Users
Name
Buy
User License
Salesforce
Custom Profile
Description
Created By
P ABINAYA, 30/03/2023, 11:54 am
Modified By
P ABINAYA, 30/03/2023, 11:54 am
Page Layouts
Standard Object Layouts
Global
Global Layout [View Assignment]
Email Application
Not Assigned [View Assignment]
Home Page Layout
DE Default [View Assignment]
Object Milestone
Object Milestone Layout [View Assignment]
Operating Hours
Operating Hours Layout [View Assignment]
Opportunity
Opportunity Layout [View Assignment]
Type here to search
ENG
23:24
29-03-2023

NEW USER

Create User

1. Go to setup → type users in quick find

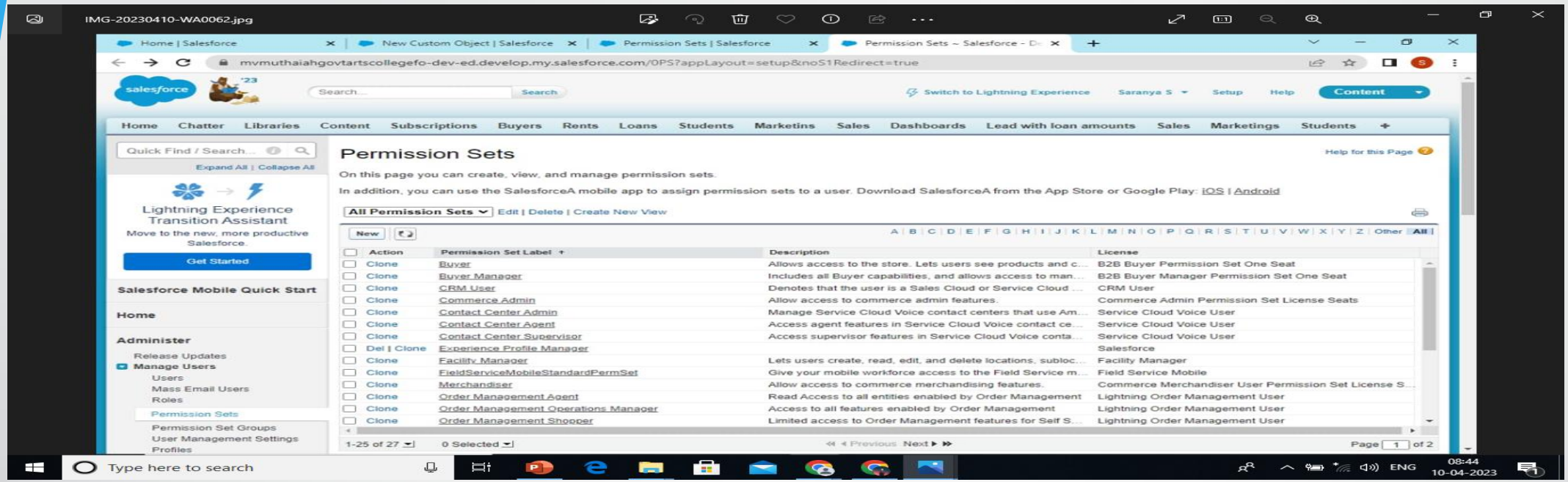
2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save box → select users → click New user

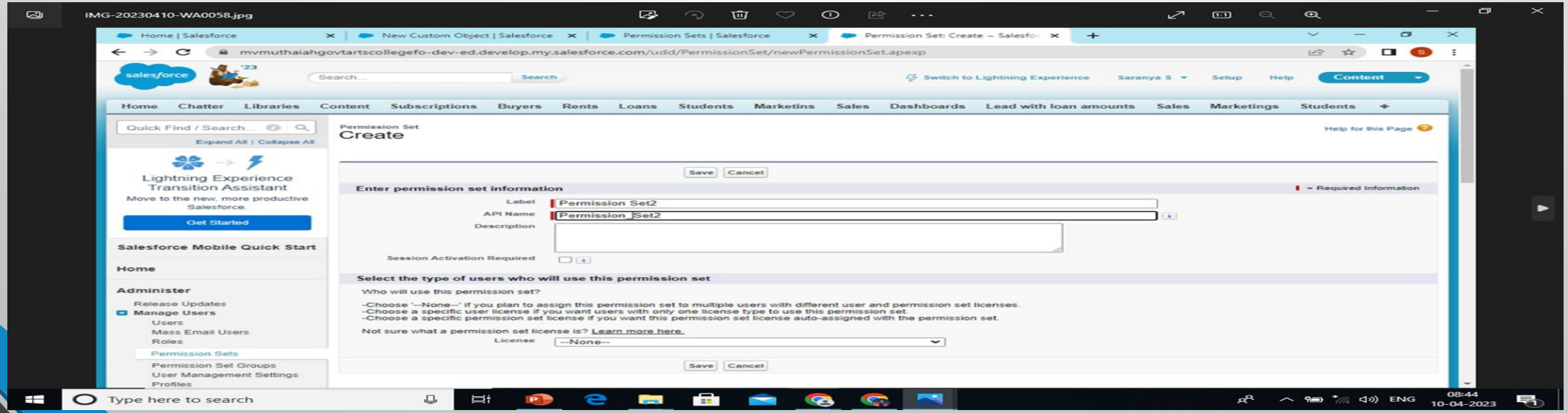


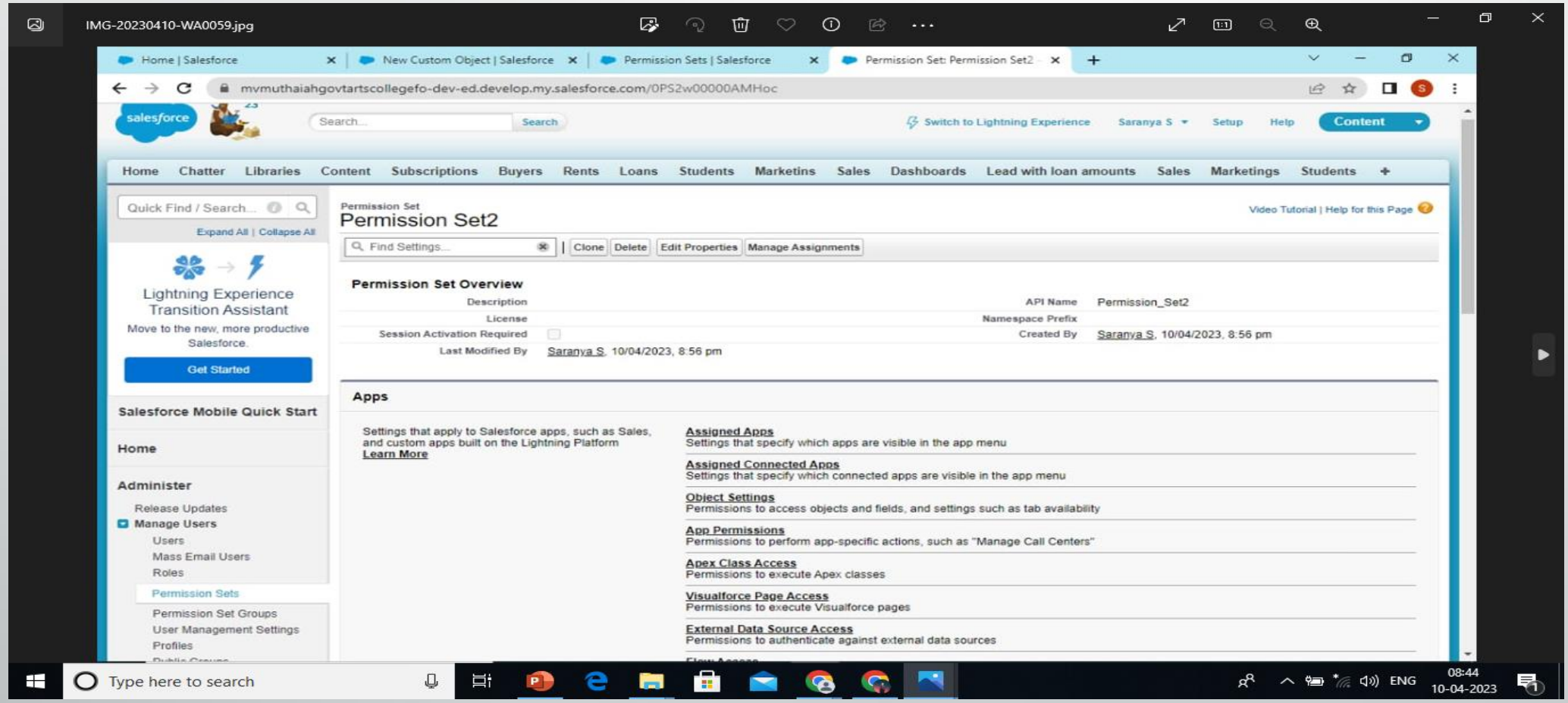
PERMISSION SET

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


IMG-20230410-WA0062.jpg
Permission Sets
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Users
Mass Email Users
Roles
Permission Sets
Permission Set Groups
User Management Settings
Profiles
Type here to search
ENG
08:44
10-04-2023


IMG-20230410-WA0058.jpg
Permission Set
Create
Enter permission set information
Label
Permission Set2
API Name
Permission_Set2
Description
Session Activation Required
Select the type of users who will use this permission set
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.
Not sure what a permission set license is? Learn more here.
License
--None--
Save
Cancel
Type here to search
ENG
08:44
10-04-2023


IMG-20230410-WA0059.jpg
Home | Salesforce
New Custom Object | Salesforce
Permission Sets | Salesforce
Permission Set: Permission Set2
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Search...
Search
Switch to Lightning Experience
Saranya S
Setup
Help
Content
Home
Chatter
Libraries
Content
Subscriptions
Buyers
Rents
Loans
Students
Marketins
Sales
Dashboards
Lead with loan amounts
Sales
Marketings
Students
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Users
Mass Email Users
Roles
Permission Sets
Permission Set Groups
User Management Settings
Profiles
Permission Set
Permission Set2
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By
Saranya S, 10/04/2023, 8:56 pm
API Name
Permission_Set2
Namespace Prefix
Created By
Saranya S, 10/04/2023, 8:56 pm
Apps
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
Learn More
Assigned Apps
Settings that specify which apps are visible in the app menu
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings such as tab availability
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
External Data Source Access
Permissions to authenticate against external data sources
Type here to search
ENG
08:44
10-04-2023

SETUP FOR OWD

Create OWD Setting

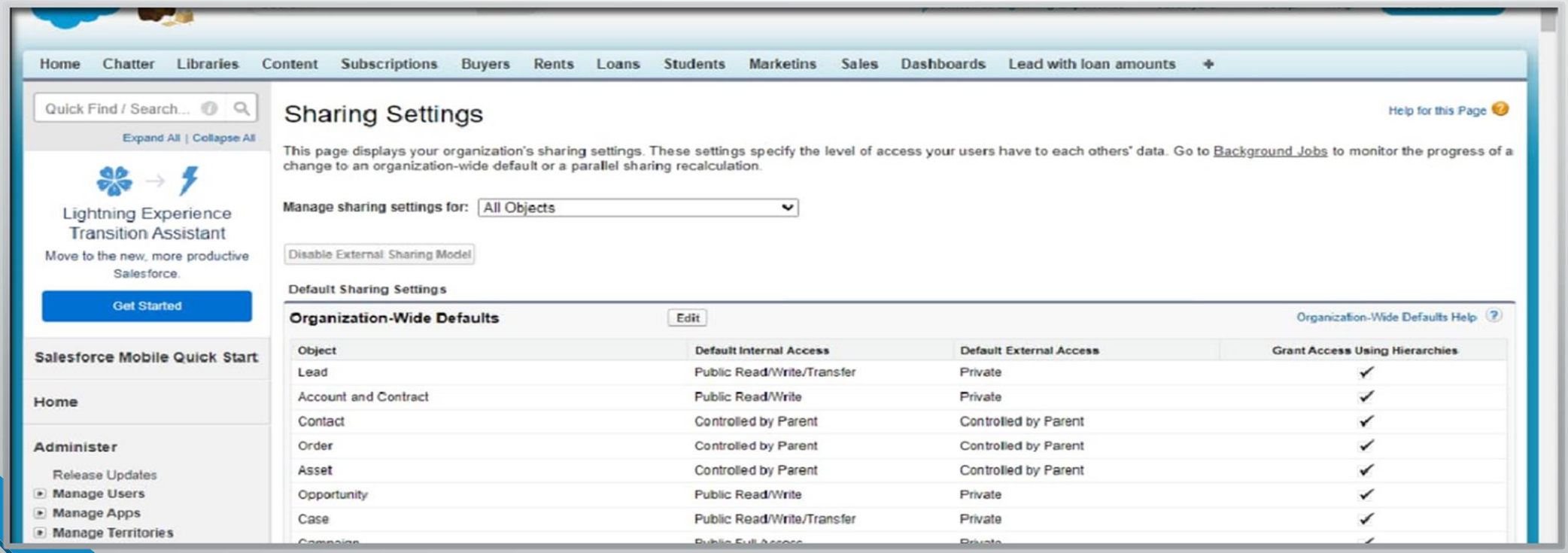
1. Setup, use the Quick Find box to find Sharing Settings.
2. Click Edit in the Organization-Wide Defaults area.
3. For each object, select the default access you want to give everyone.
4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Lead, Rent custom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

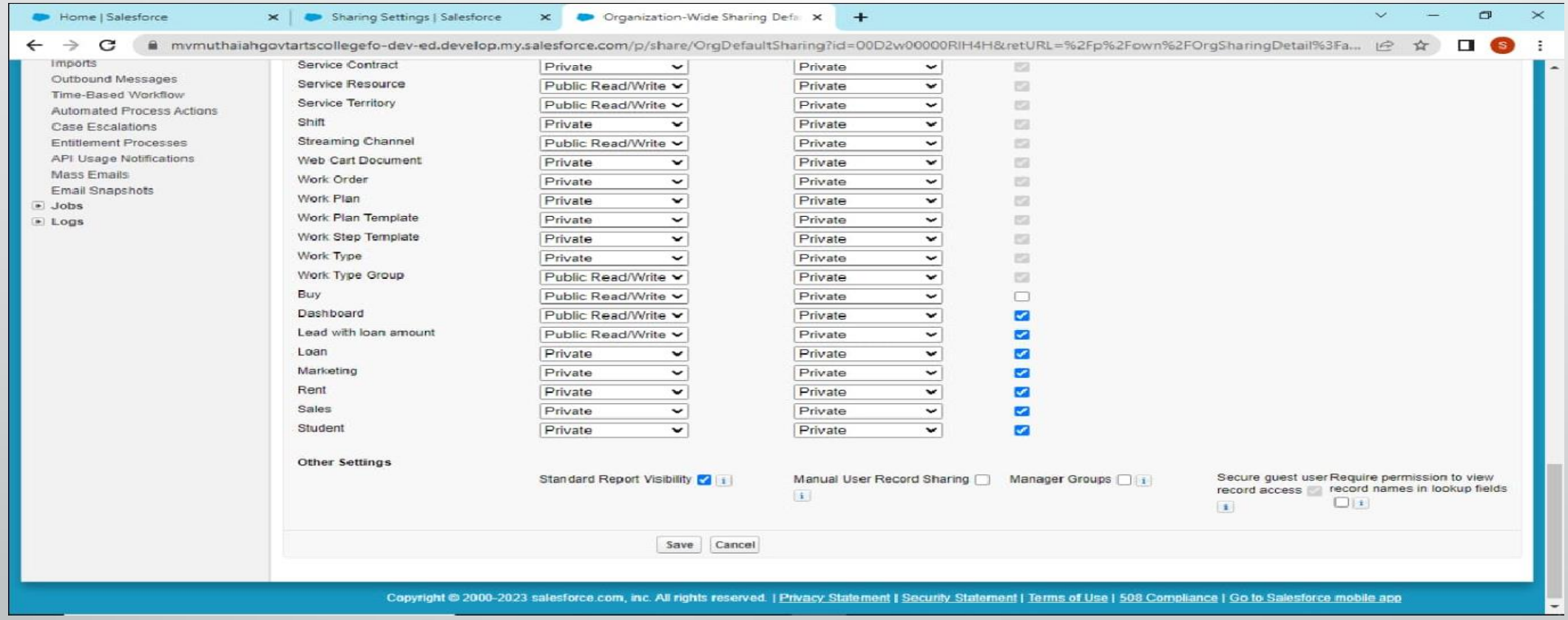
Marketing

1. Create the Record Level OWD Setting give it As A Private To Marketing manager And Marketing Executive

Sales:

1. Sale Manager OWD is Set As Private similarly sales Rep1, Sales Rep2 same OWD for them




Home | Salesforce
Sharing Settings | Salesforce
Organization-Wide Sharing Defa
mvmuthaiahgovtartscollegefo-dev-ed.develop.my.salesforce.com/p/share/OrgDefaultSharing?id=00D2w00000RIH4H&retURL=%2Fp%2Fown%2FOrgSharingDetail%3Fa...
Imports
Outbound Messages
Time-Based Workflow
Automated Process Actions
Case Escalations
Entitlement Processes
API Usage Notifications
Mass Emails
Email Snapshots
Jobs
Logs
Service Contract Private Private
Service Resource Public Read/Write Private
Service Territory Public Read/Write Private
Shift Private Private
Streaming Channel Public Read/Write Private
Web Cart Document Private Private
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
Dashboard Public Read/Write Private
Lead with loan amount Public Read/Write Private
Loan Private Private
Marketing Private Private
Rent Private Private
Sales Private Private
Student Private 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
Copyright © 2000-2023 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance | Go to Salesforce mobile app

REPORTS

Create Report

1. Go to the app → click on the reports tab

2. Click New Report

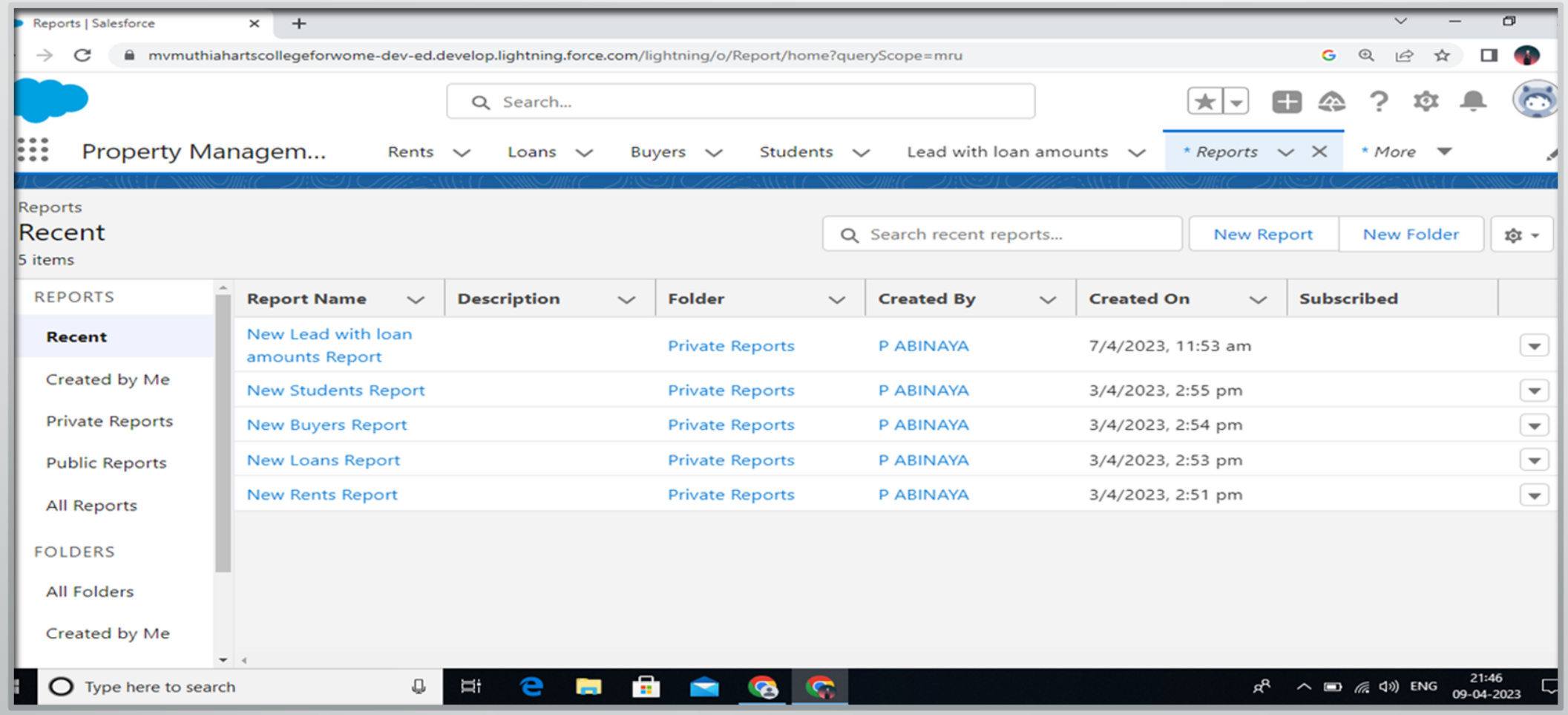
3. Select report type from category or from report type panel or from search panel → click on start report

4. Customize your report, then save or run it

Create Report for following Condition

1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the Property

2. The Condition should be Like Loan Amount >=to 5000$


Reports | Salesforce
mvmuthiahartscollegeforwome-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Search...
Property Managem...
Rents
Loans
Buyers
Students
Lead with loan amounts
* Reports
* More
Reports
Recent
5 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Report Name
Description
Folder
Created By
Created On
Subscribed
New Lead with loan amounts Report
Private Reports
P ABINAYA
7/4/2023, 11:53 am
New Students Report
Private Reports
P ABINAYA
3/4/2023, 2:55 pm
New Buyers Report
Private Reports
P ABINAYA
3/4/2023, 2:54 pm
New Loans Report
Private Reports
P ABINAYA
3/4/2023, 2:53 pm
New Rents Report
Private Reports
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3/4/2023, 2:51 pm
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ENG
21:46
09-04-2023

DASHBOARD

Create dashboards

1. Go to the App Launcher and select the Dashboards

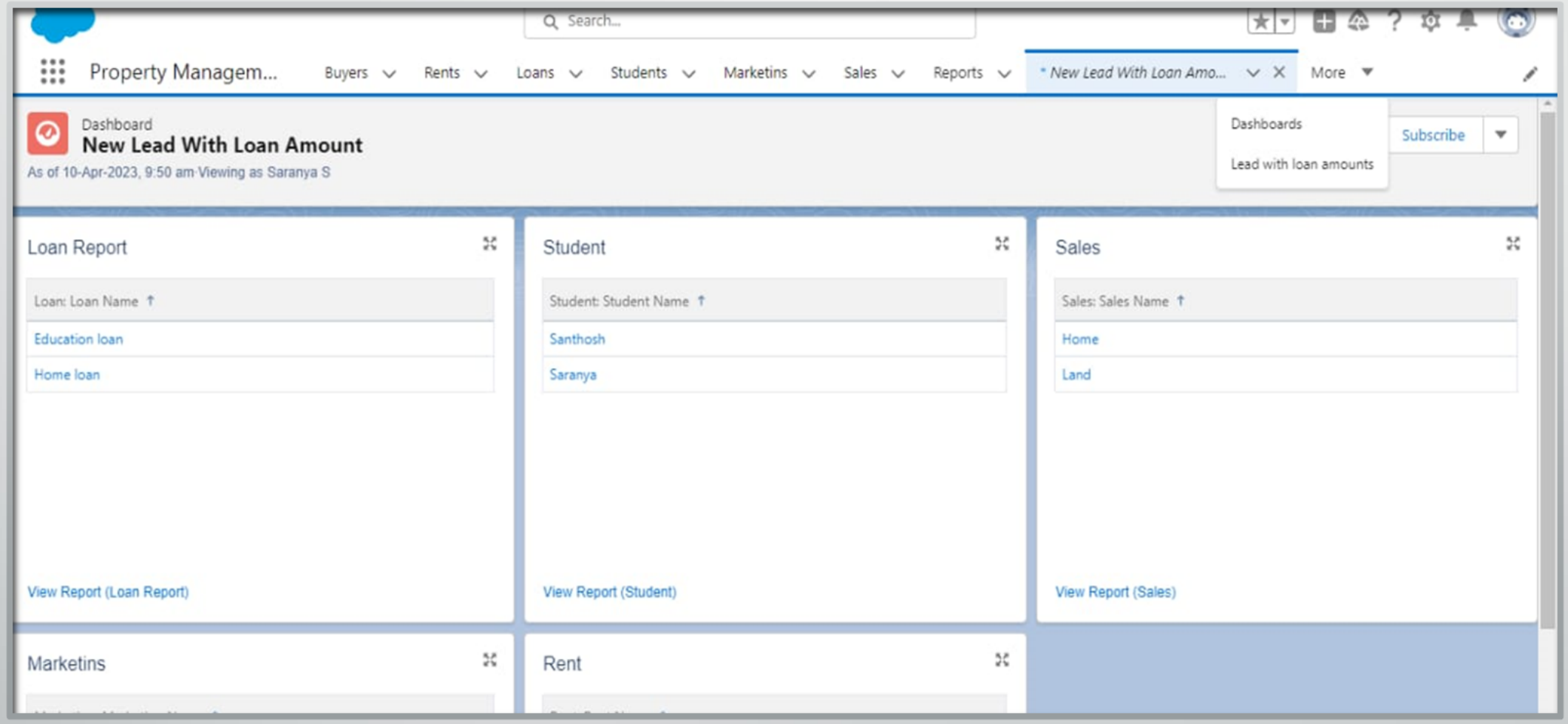
2. Select add component

3. Select the folder select the following option new lead with loan Amount

4. Select in which format you want display chart

Create Dashboard

1. Create the Dashboard for the Same Take Any Type of Dashboard(Chart) And Display It on The App Home Page


Search...
Property Managem...
Buyers
Rents
Loans
Students
Marketins
Sales
Reports
* New Lead With Loan Amo...
More
Dashboard
New Lead With Loan Amount
As of 10-Apr-2023, 9:50 am Viewing as Saranya S
Dashboards
Lead with loan amounts
Subscribe
Loan Report
Loan: Loan Name
Education loan
Home loan
View Report (Loan Report)
Student
Student: Student Name
Santhosh
Saranya
View Report (Student)
Sales
Sales: Sales Name
Home
Land
View Report (Sales)
Marketins
Rent

CONCLUSION

- 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 upto 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.
- Then Finally Create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal.

THANK YOU