

## INTRODUCTION

### OVERVIEW

In our project be able to create all base data including Lead, Buy, Loans, Rents and then reports and dashboards.

### DESCRIPTION

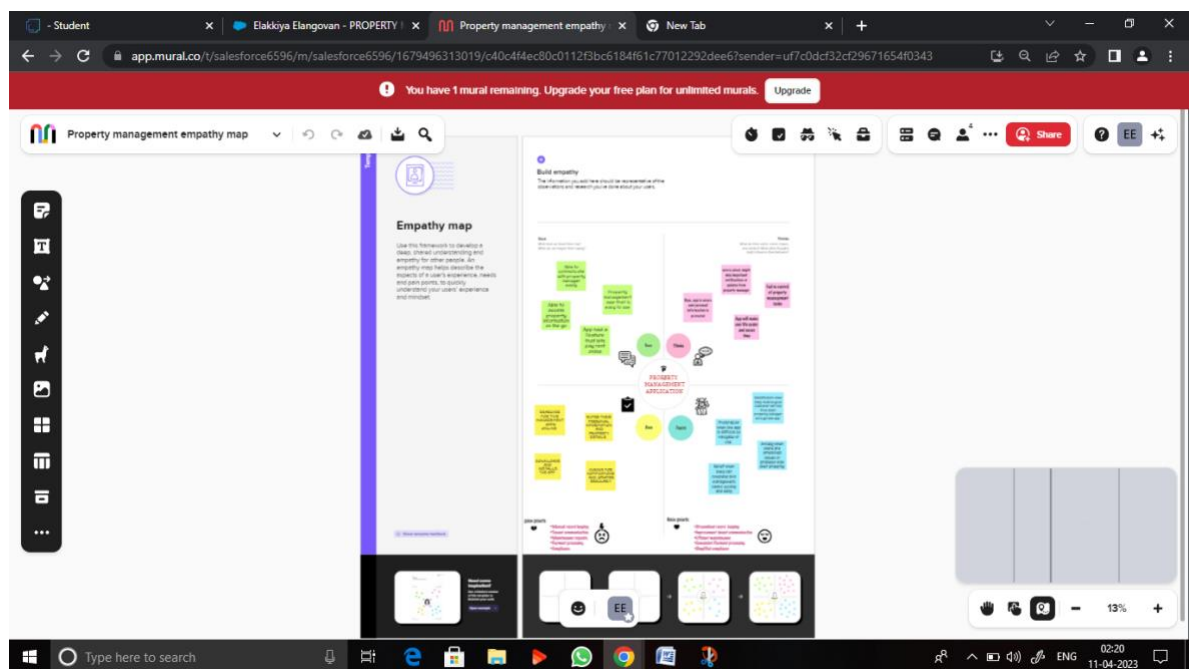
A property management app is to manage the user rental properties. We had developed a customer need, requests, requirements and appropriate details of the property for whose buy the app like property managers and tenants.

### PURPOSE

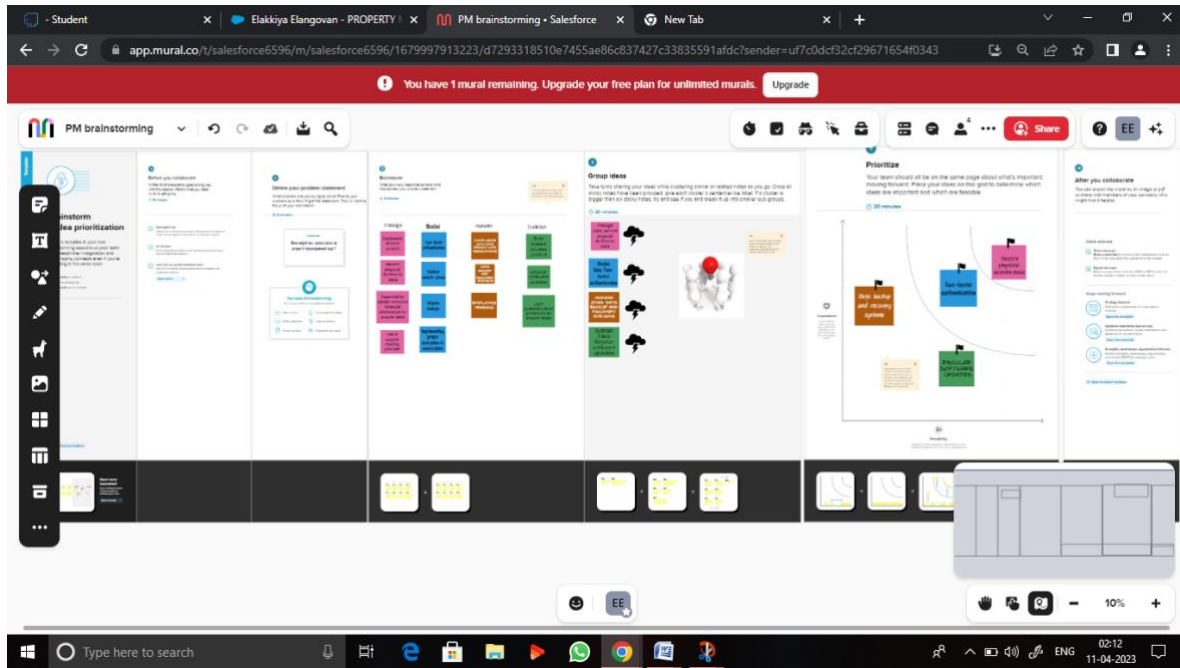
We had to create a reports and dashboards. So there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal finally.

## PROBLEM DEFINITION & DESIGN THINKING

### EMPATHY MAP



## IDEATION & BRAINSTORMING MAP:



## RESULT

### DATA MODEL

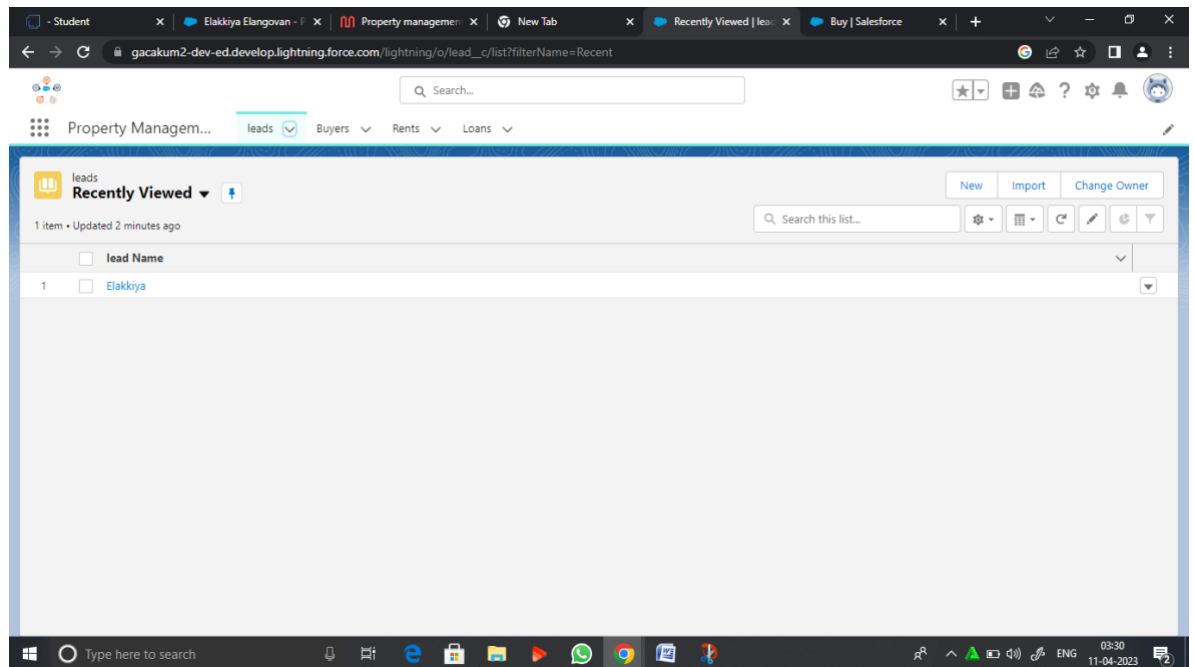
OBJECT NAME	FIELDS AND OBJECT	
1. BUY	<b>Field label</b>	<b>Data type</b>
	Buy	Text
	Property Type	Pick list
	Discount	Percentage
	State	Pick list
	City	Pick list
	Annual Amount	Text
2. RENT	<b>Field label</b>	<b>Data type</b>
	Rent	Auto number
	Rental city	Text
	BHK type	Pick list
3. LOAN	<b>Field label</b>	<b>Data type</b>

# Project Report Template

	<i>Loan</i>	<i>Text</i>
	<i>Loan Id</i>	<i>Auto number</i>
	<i>Interest rate</i>	<i>Currency</i>
	<i>Term</i>	<i>Number</i>
	<i>Annual loan</i>	<i>Number</i>
	<i>Total loan installments</i>	<i>Number</i>
	<i>Loan repayment</i>	<i>Number</i>
	<i>Loan Amount</i>	<i>Formula</i>
4. LEAD	<b>Field label</b>	<b>Data type</b>
	<i>Lead</i>	<i>Auto number</i>
	<i>State</i>	<i>Pick list</i>
	<i>City</i>	<i>Pick list</i>
	<i>Email</i>	<i>Email</i>
	<i>Phone</i>	<i>Phone</i>

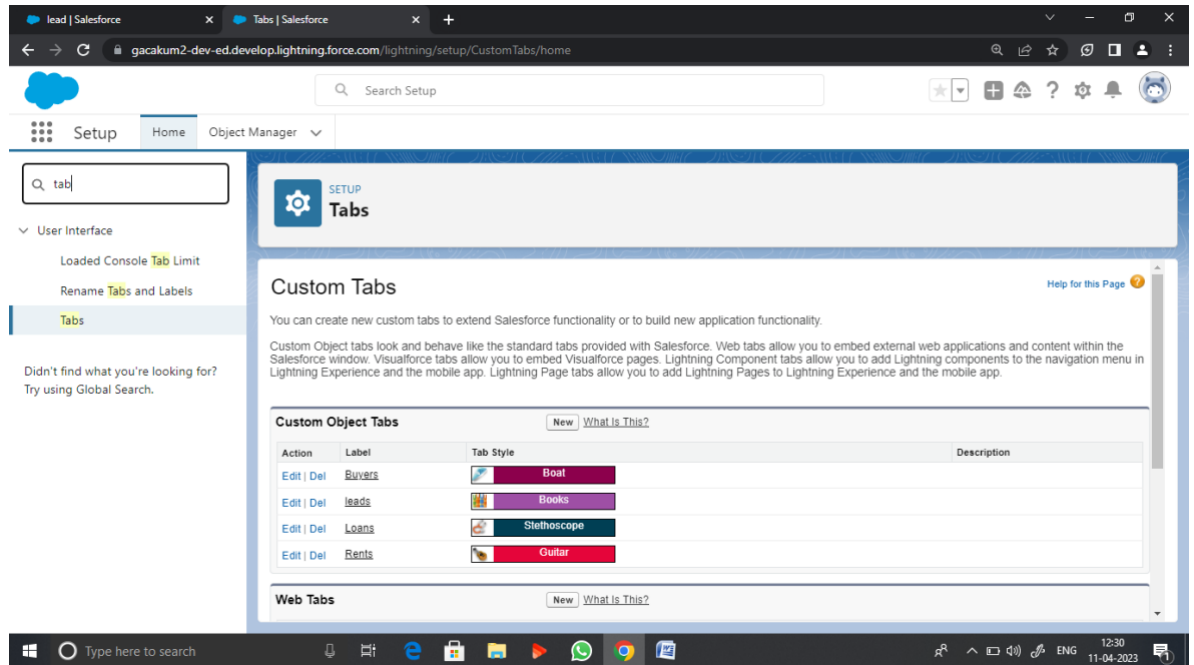
## ACTIVITY & SCREENSHOT

### MILESTONE 2:



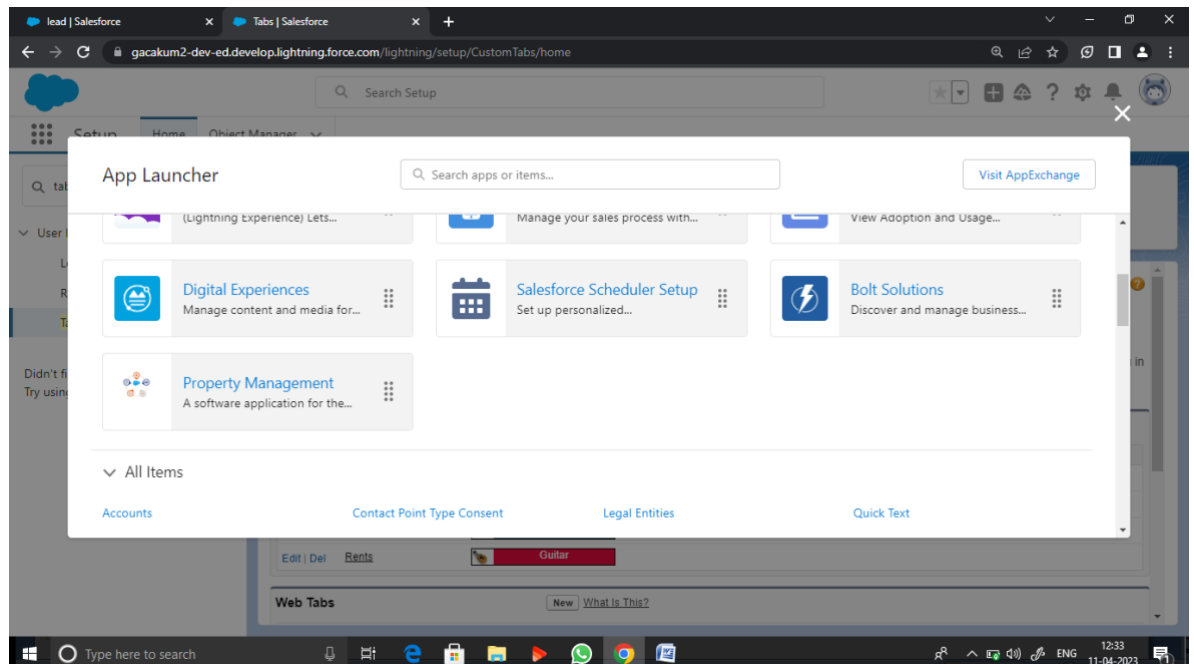
Creation of object (Buy, Rent, Loan, Lead)

## MILESTONE 3:



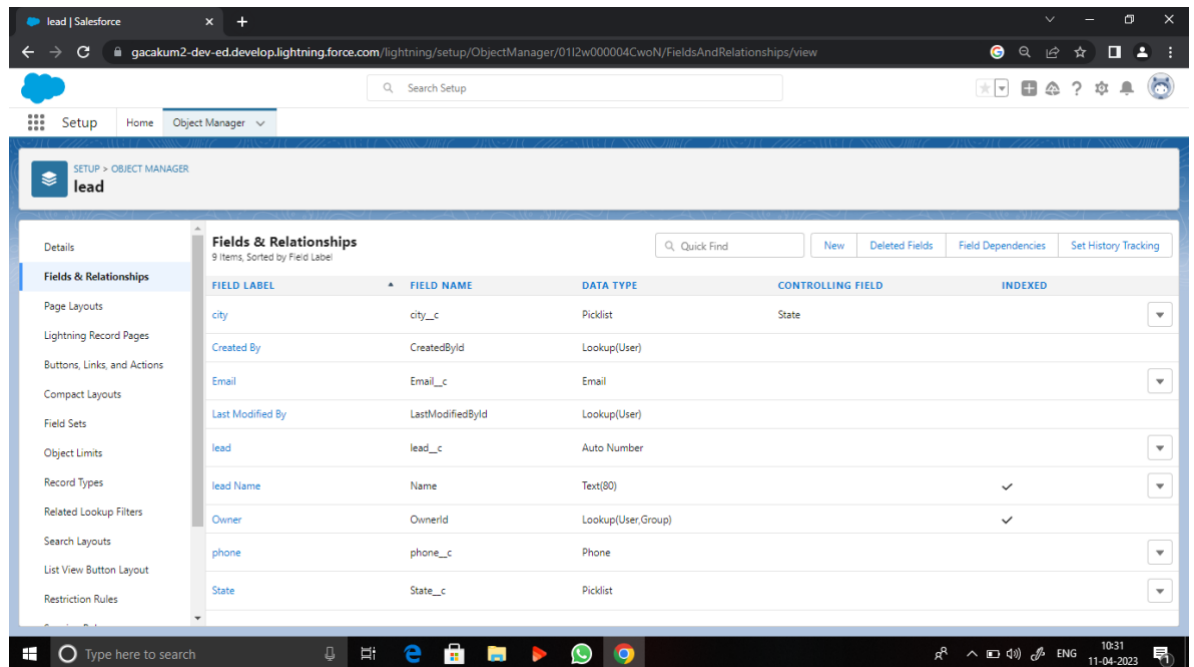
**Creation of Tabs (Lead, Buy, Rent, Loan)**

## MILESTONE 4:



**Creation of Lightning app(Utility items, Navigation items and user profiles)**

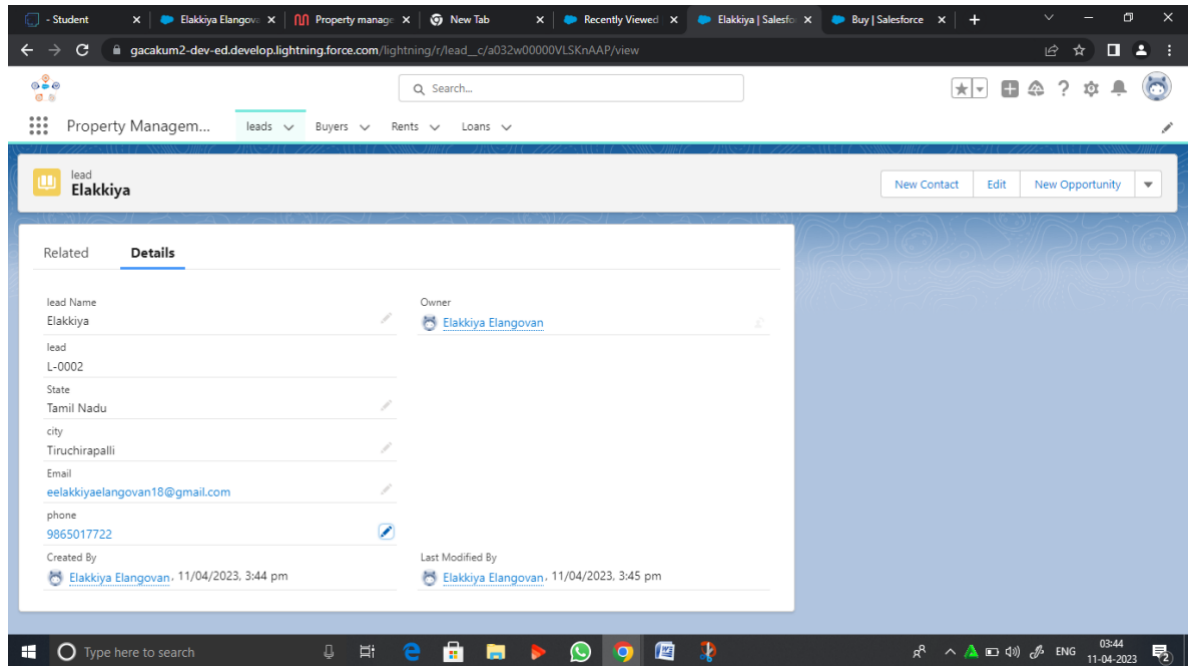
## MILESTONE 5:



The screenshot displays the Salesforce Object Manager interface for the 'lead' object. The 'Fields & Relationships' tab is selected, showing a list of 9 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
city	city__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
lead	lead__c	Auto Number		
lead Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
phone	phone__c	Phone		
State	State__c	Picklist		

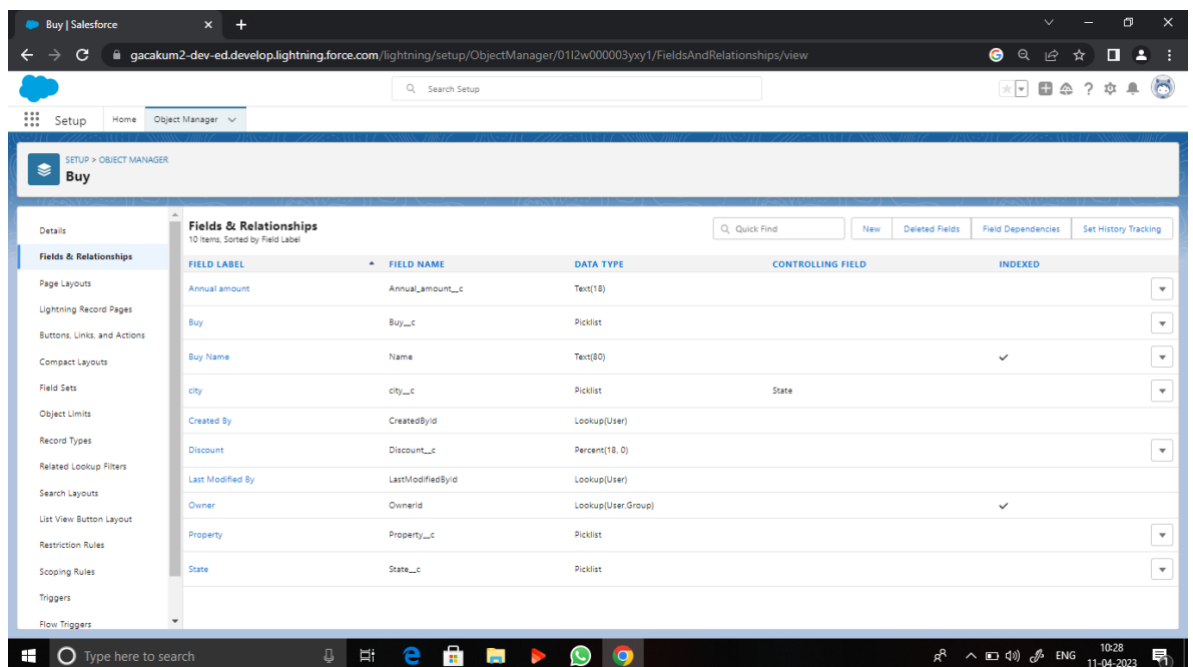
# Project Report Template



The screenshot shows a Salesforce Lead record for 'Elakkiya'. The record is owned by 'Elakkiya Elangovan'. The details section shows the following information:

- Lead Name: Elakkiya
- Lead: L-0002
- State: Tamil Nadu
- City: Tiruchirapalli
- Email: eelakkiyaelangovan18@gmail.com
- Phone: 9865017722
- Created By: Elakkiya Elangovan, 11/04/2023, 3:44 pm
- Last Modified By: Elakkiya Elangovan, 11/04/2023, 3:45 pm

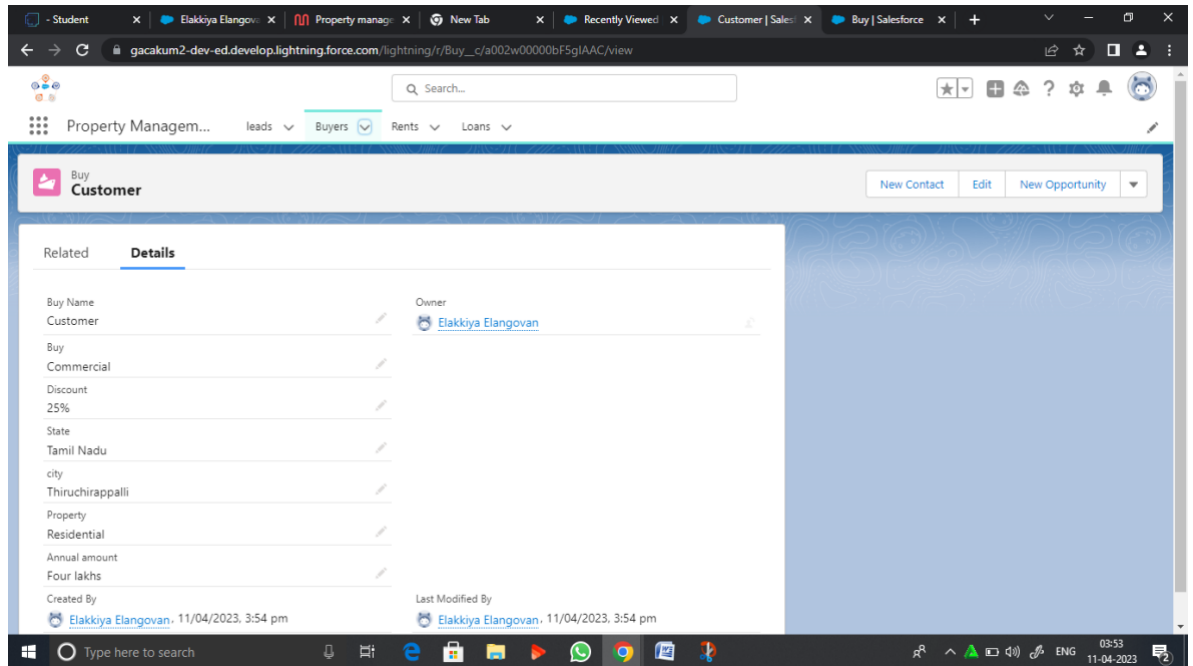
## Buy Field:



The screenshot shows the Salesforce Setup page for the 'Buy' object. The 'Fields & Relationships' section is expanded, showing a list of fields and their relationships. The table below represents the data shown in the screenshot:

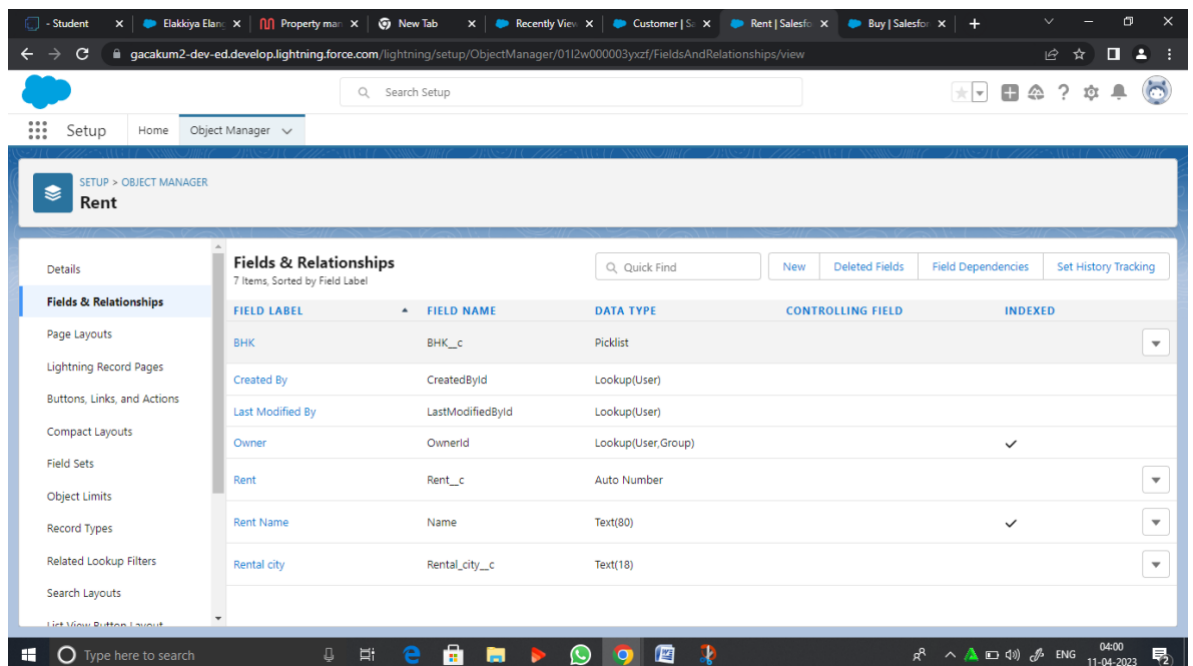
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual amount	Annual_Amount__c	Text(18)		
Buy	Buy__c	Picklist		
Buy Name	Name	Text(80)		✓
City	City__c	Picklist	State	
Created By	CreatedBy	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Property	Property__c	Picklist		
State	State__c	Picklist		

# Project Report Template



The screenshot shows a Salesforce Lightning interface with a browser window displaying a 'Buy Customer' record. The browser tabs include 'Student', 'Elakkiya Elangovan', 'Property manag...', 'New Tab', 'Recently Viewed', 'Customer | Sales', and 'Buy | Salesforce'. The URL is 'gacakum2-dev-ed.develop.lightning.force.com/lightning/r/Buy\_c/a002w00000bF5glAAC/view'. The interface shows a search bar, a navigation menu with 'Property Managem...', 'leads', 'Buyers', 'Rents', and 'Loans', and a 'Buy Customer' record page. The record page has tabs for 'Related' and 'Details'. The 'Details' tab is active, showing fields like 'Buy Name', 'Buy', 'Discount', 'State', 'city', 'Property', 'Annual amount', 'Created By', and 'Last Modified By'. The 'Buy Name' is 'Customer', 'Buy' is 'Commercial', 'Discount' is '25%', 'State' is 'Tamil Nadu', 'city' is 'Thiruchirappalli', 'Property' is 'Residential', 'Annual amount' is 'Four lakhs', 'Created By' is 'Elakkiya Elangovan', and 'Last Modified By' is 'Elakkiya Elangovan'. The record was created on 11/04/2023 at 3:54 pm. The Windows taskbar at the bottom shows the search bar, task view, and various application icons, with the system clock showing 03:53 on 11-04-2023.

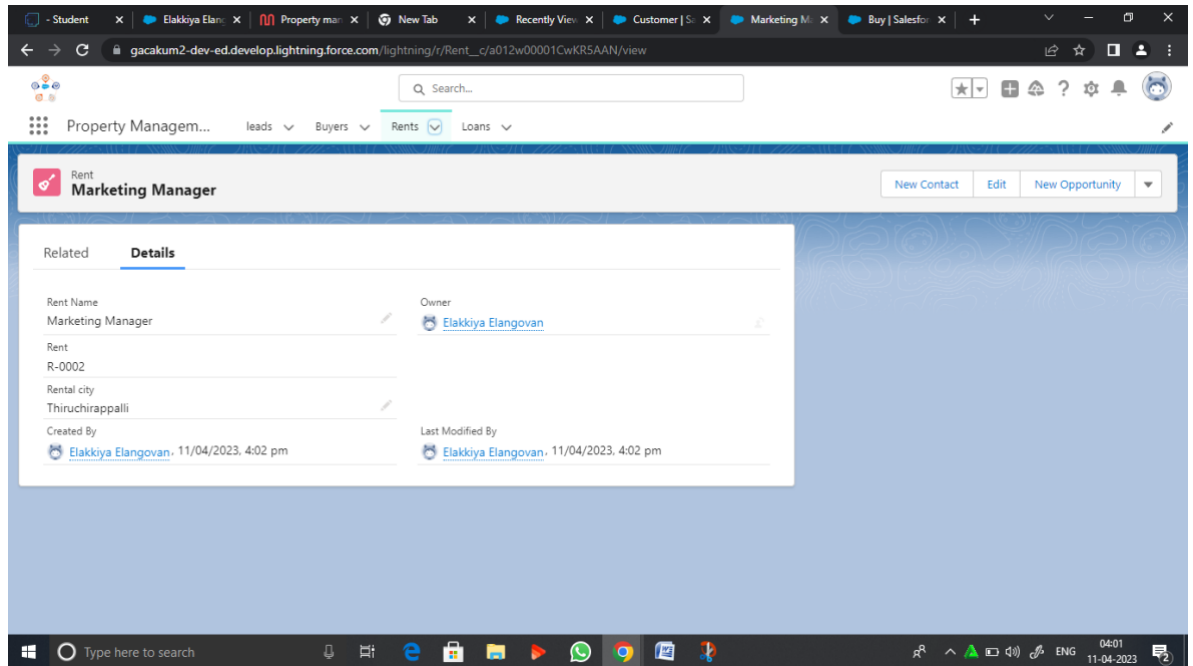
## Rent Field:



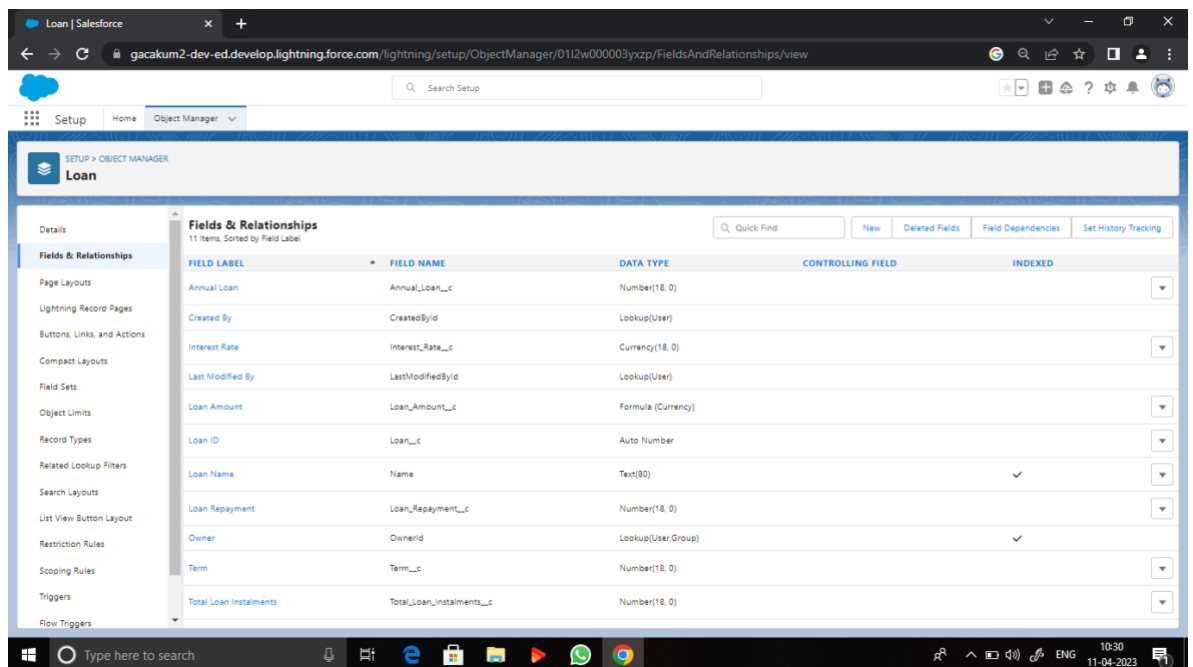
The screenshot shows a Salesforce Lightning interface with a browser window displaying the 'Rent' object setup page. The browser tabs include 'Student', 'Elakkiya Elan...', 'Property ma...', 'New Tab', 'Recently Viewed', 'Customer | S...', 'Rent | Salesf...', and 'Buy | Salesf...'. The URL is 'gacakum2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003yxzf/FieldsAndRelationships/view'. The interface shows a search bar, a navigation menu with 'Setup', 'Home', and 'Object Manager', and a 'Rent' object setup page. The page has tabs for 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The 'Fields & Relationships' tab is active, showing a table with 7 items, sorted by Field Label. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The fields listed are: 'BHK' (BHK\_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)), and 'Rental city' (Rental\_city\_c, Text(18)). The Windows taskbar at the bottom shows the search bar, task view, and various application icons, with the system clock showing 04:00 on 11-04-2023.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK	BHK_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(18)		

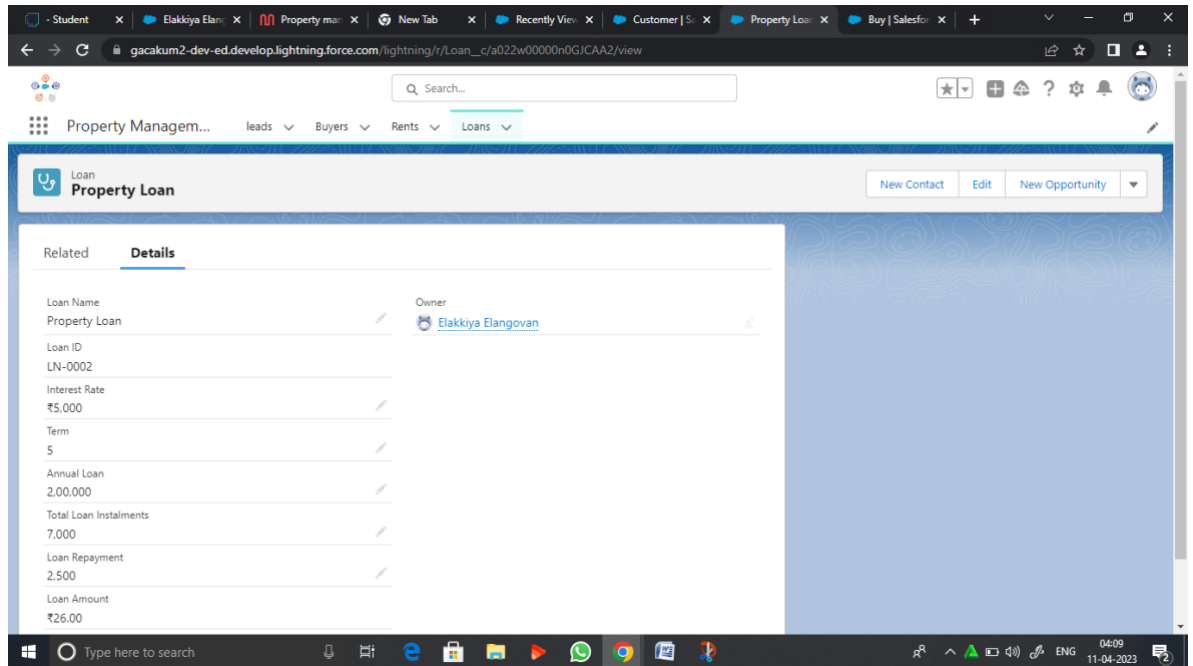
# Project Report Template



## Loan Fields:

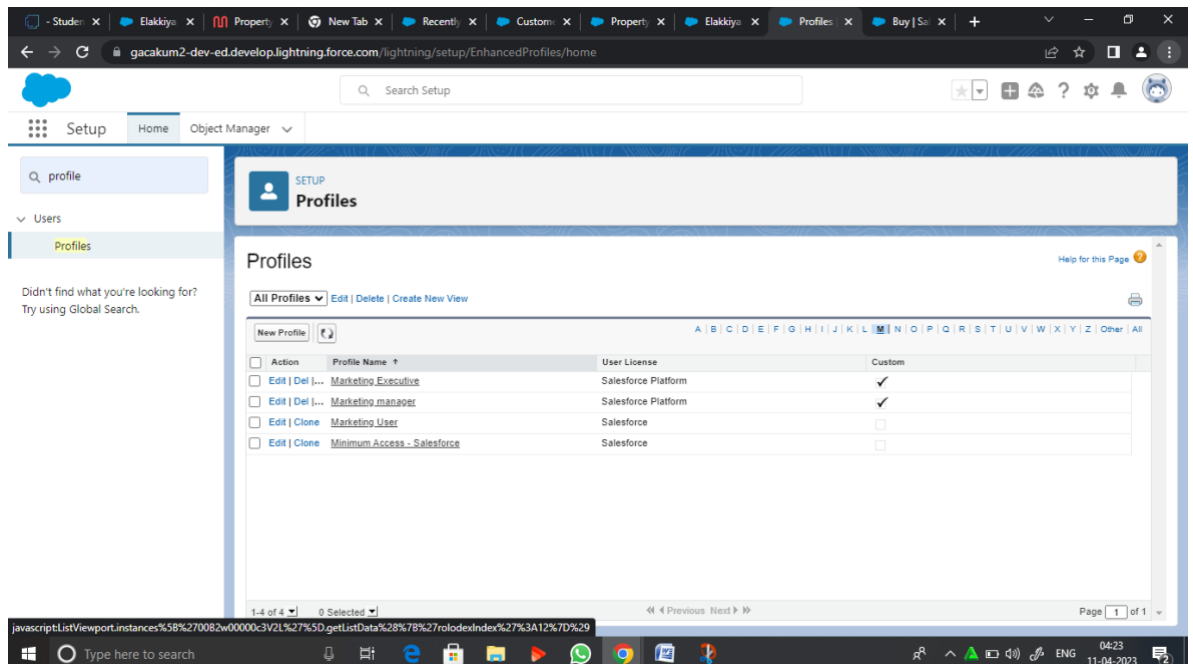


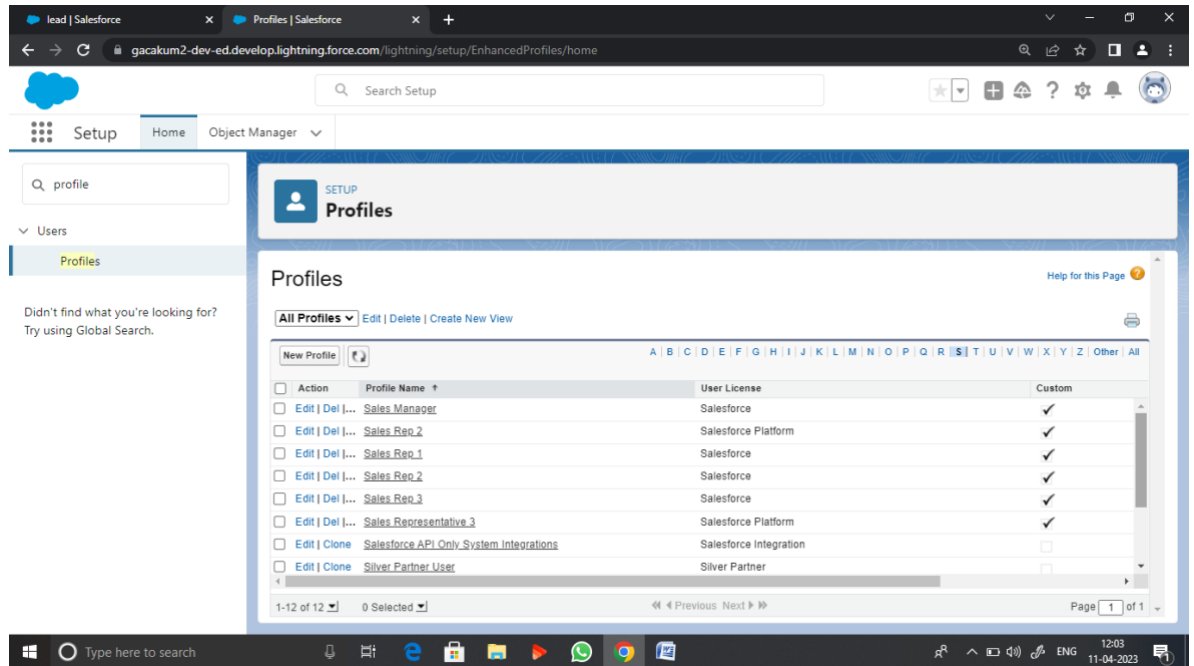




## Creation of Fields (Lead, Buy, Rent, Loan and Loan amount formula)

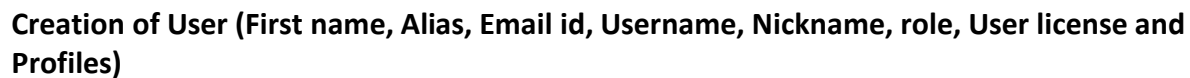
## MILESTONE 6:





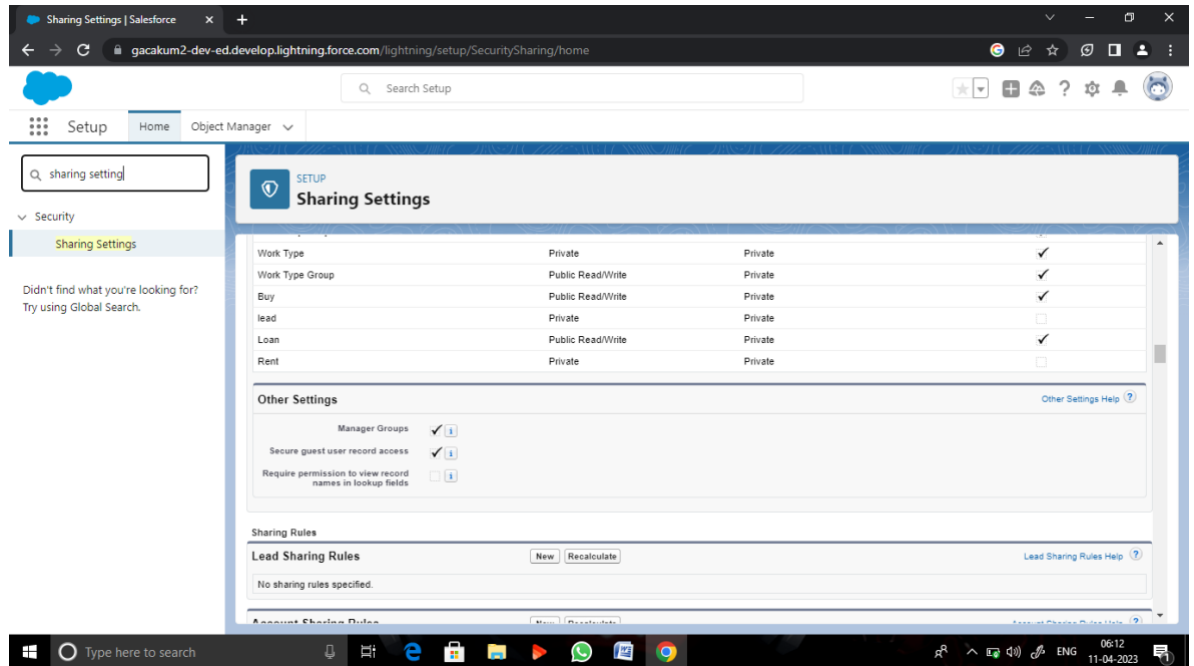
**Creation of Profiles (Sales manager, Marketing manager, Marketing executive, Sales rep 1,2,3)**

**MILESTONE 7:**



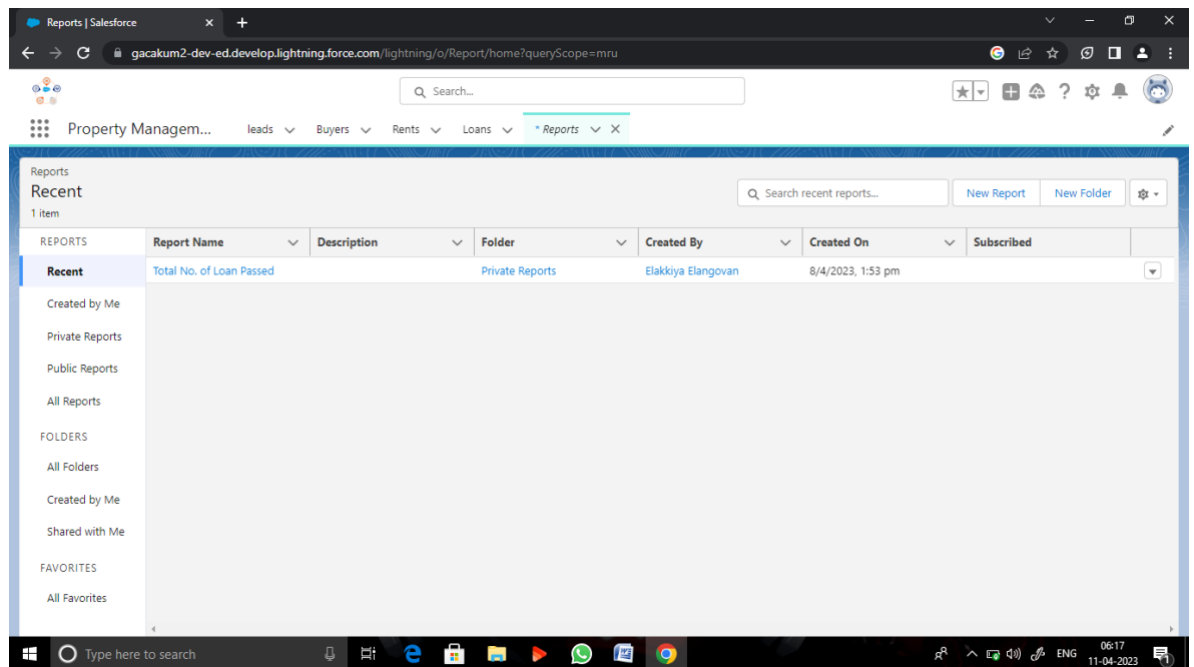
### Creation of Permission sets (User functional access without using their profiles)

## MILESTONE 9:



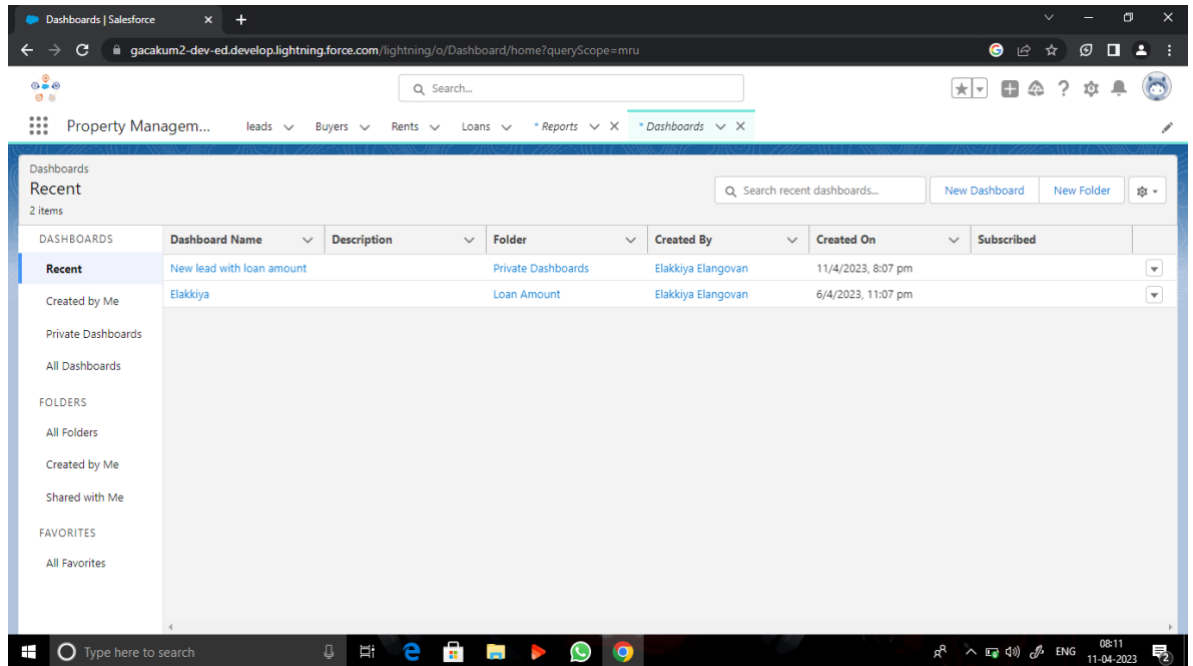
**Creation of OWD (We could select the default access for custom objects)**

## MILESTONE 10:



**Creation of Reports (Total number of loan amount passed for the property)**

## MILESTONE 11:



**Creation of Dashboards (New lead with loan amount and displayed it on the app home page)**

## TRAILHEAD PROFILE PUBLIC URL

- Team Lead – <https://trailblazer.me/id/eelangovan9>
- Team Member 1 – <https://trailblazer.me/id/ssivakumar67>
- Team Member 2 – <https://trailblazer.me/id/mmarimuthu14>
- Team Member 3 – <https://trailblazer.me/id/mmsathish>

## ADVANTAGE

- ❖ *This apps help keep track of important information such as lease agreements, rent payments, maintenance schedules, and tenant information in one centralized location. It make easier to avoid missing details.*
- ❖ *This free up time for property managers to focus on more important tasks like rent collection, lease renewals for property managers.*
- ❖ *This improves close communications with customers and users.*
- ❖ *Strong verification and authentication factors are helps more securing data.*
- ❖ *For instance, they can easily track rental income, expenses, and occupancy rates, making it easier to identify trends and make data-driven decisions.*

## DISADVANTAGE

- ❖ *It has well ongoing costs such as subscription fees. These costs may be difficult to justify for smaller property management companies.*
- ❖ *It may have technical issues, such as server downtime or software bugs. These can be frustrating for managers and tenants alike.*
- ❖ *In this, some tenants may not be comfortable using the app and may prefer traditional methods of communication.*

## APPLICATION

*Apps are used in the various areas such as residential and commercial properties, vacation rentals, student housing.*

## CONCLUSION

*We had created a loan amount transaction for properties in this app. It improves close communication to customers with property managers easily.*

## FUTURE SCOPE

- *Integration with smart phone technologies*
- *Artificial intelligence (AI) and Machine learning (ML)*
- *Virtual and augmented reality*
- *Sustainability and energy efficiency*