

Project Report Template

Project Title : Property Management Application Using Salesforce

1 INTRODUCTION

1.1 Overview

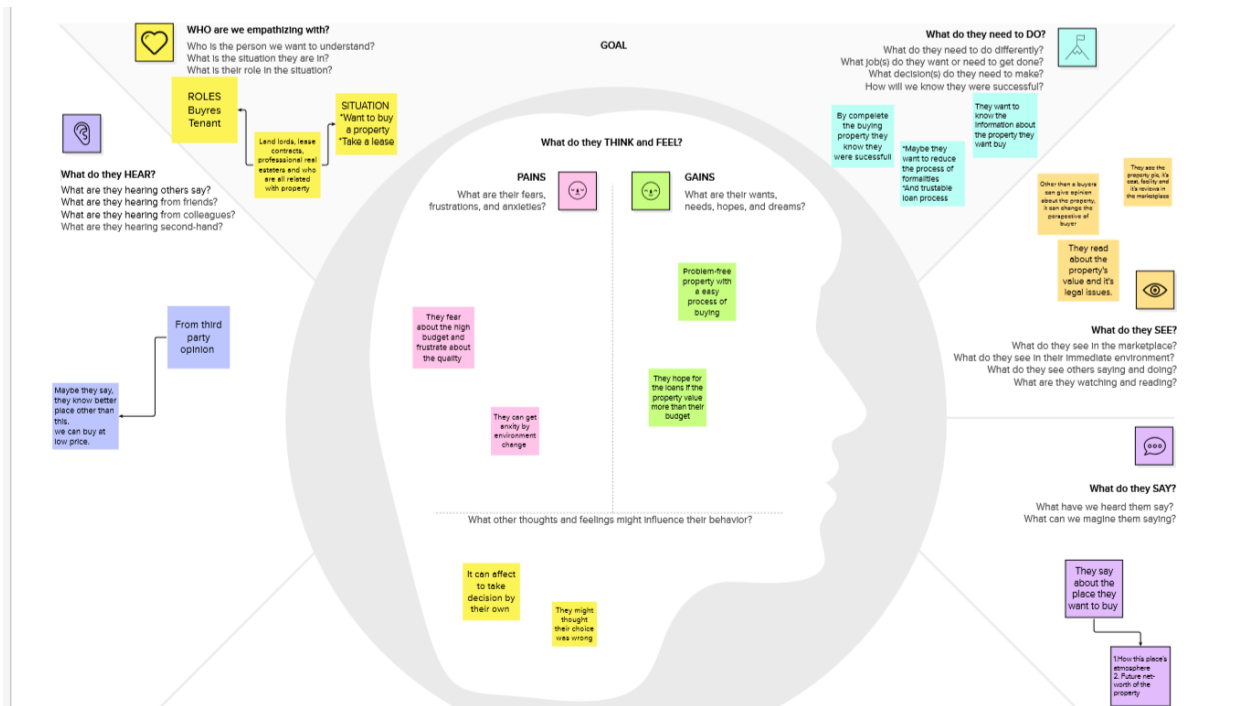
- Develop an App for the Property Management where Buyer can order his Requirements and get the Appropriate Details of the Property.
- Track Whether he is Interested in taking the loan available for so just calculate how much loan Amount user can get it.
- Create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal.

1.2 Purpose

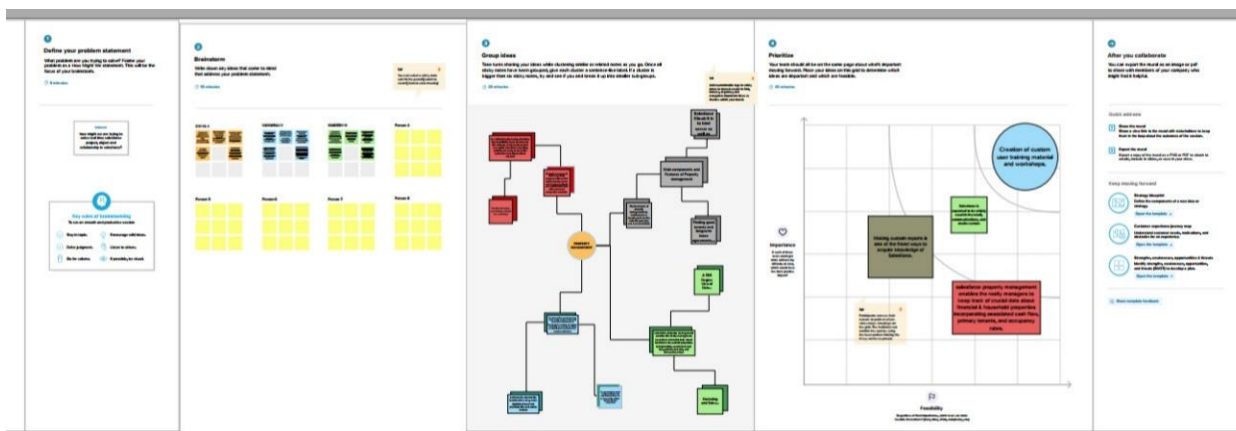
- Finding about sales of property, worth of property, picture of the property, lease contracts etc., so easily at site of our app.
- We made direct connect between customer and sales person. Saving the time for finding property rather than manual method. We can Secure their personal data by app.

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy map



2.2 Brainstroming & Idea Prioritization Template



3 RESULT


3.1 Data Model

Activities and Screenshots


MILESTONE 2 : OBJECT

Create buy object


BUYER object

<div> <div>  <div> <div>SETUP</div> <div>Object Manager</div> <div>1 Items, Sorted by Label</div> </div> </div> <div> <input type="text" value="buy"/> <div> <div>Schema Builder</div> <div>Create ▾</div> </div> </div> </div>					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Buy	Buy__c	Custom Object		08/04/2023	✓

#RENT object


<div> <div>  <div> <div>SETUP</div> <div>Object Manager</div> <div>1 Items, Sorted by Label</div> </div> </div> <div> <input type="text" value="rent"/> <div> <div>Schema Builder</div> <div>Create ▾</div> </div> </div> </div>					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Rent	Rent__c	Custom Object		08/04/2023	✓

#LOAN object

<div> <div>  <div> <div>SETUP > OBJECT MANAGER</div> <div>Loan</div> </div> </div> </div>	
<div> <div>Details</div> <div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>List View Button Layout</div> </div> </div>	<div> <div>Details</div> <div> <div> <div>Description</div> <div> <div>API Name</div> <div>Loan__c</div> <div>Custom</div> <div>✓</div> <div>Singular Label</div> <div>Loan</div> <div>Plural Label</div> <div>Loans</div> </div> </div> <div> <div>Enable Reports</div> <div>✓</div> <div>Track Activities</div> <div>Track Field History</div> <div>Deployment Status</div> <div>Deployed</div> <div>Help Settings</div> <div>Standard salesforce.com Help Window</div> </div> </div> <div> <div>Edit</div> <div>Delete</div> </div> </div>

MILESTONE 3 : TAB


#To create buy tab

 **SETUP**
Tabs


Custom Object Tab
Buyers [Help for this Page](#)

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail [Edit](#) [Delete](#)

Tab Label	Buyers	Tab Style	 Laptop
Object	Buy	Splash Page Custom Link	
Description			
Created By	Magesh Natrajan, 08/04/2023, 2:10 pm	Modified By	Magesh Natrajan, 08/04/2023, 2:10 pm


#To create rents tab

 **SETUP**
Tabs

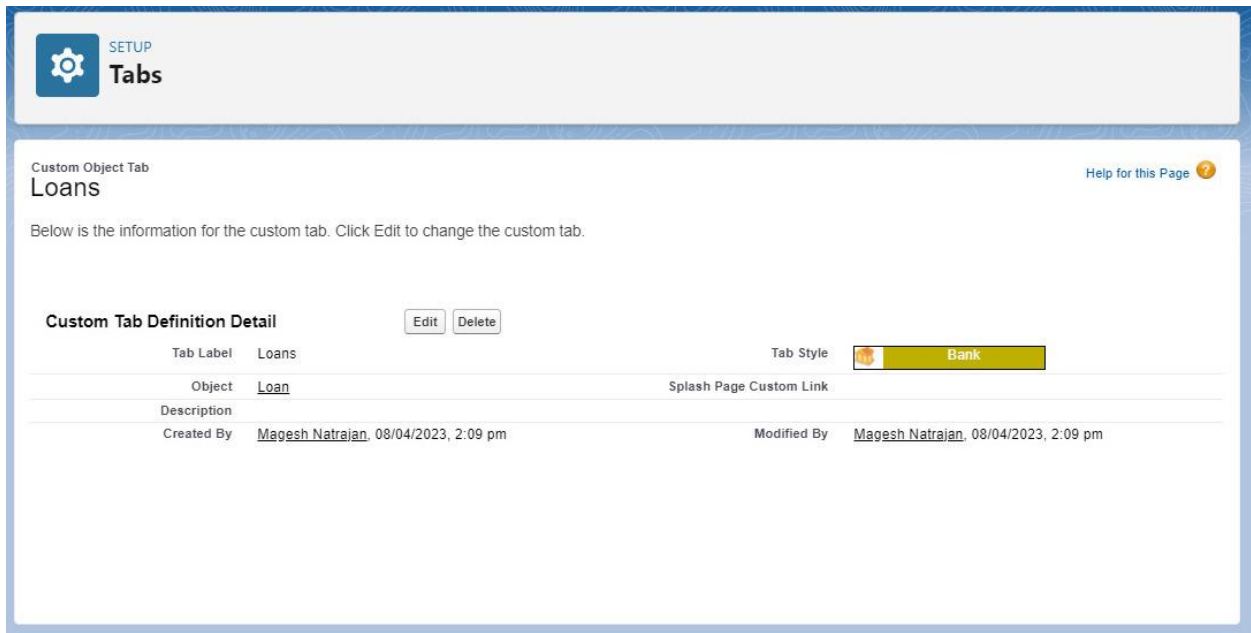
Custom Object Tab
Rents [Help for this Page](#)

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail [Edit](#) [Delete](#)

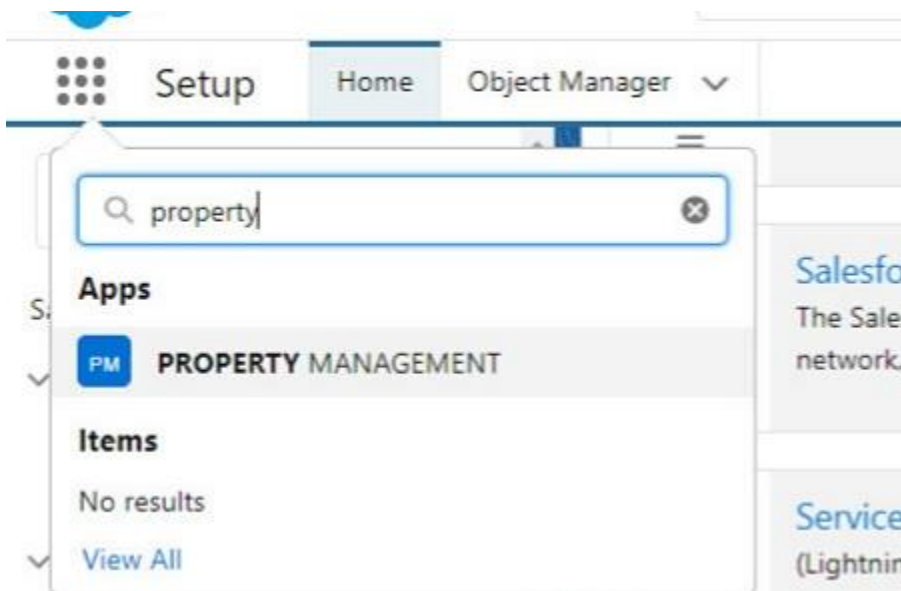
Tab Label	Rents	Tab Style	 Factory
Object	Rent	Splash Page Custom Link	
Description			
Created By	Magesh Natrajan, 08/04/2023, 2:12 pm	Modified By	Magesh Natrajan, 08/04/2023, 2:12 pm

#To create loan tab



MILESTONE 4 : LIGHTING APP

Create the PROPERTY MANAGEMENT APPLICATION APP



MILESTONE 5 : FILEDS

Creating a field & relationship of buyers

SETUP > OBJECT MANAGER

Buy

Details

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
700	RESEDENTIAL__c	Picklist (Multi-Select)		
87654321.80	PERCENTAGE__c	Percent(8, 2)		
Buy Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Field dependencies	Maharastra_gujarat_rajasthan__c	Picklist (Multi-Select)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Creating a field & relationship of renters

SETUP > OBJECT MANAGER

Rent

Details

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
55555	X55555__c	Auto Number		
BHK	XBHK__c	Picklist		
CHENNAI	CHENNAI__c	Text(7)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent name	Name	Text(80)		✓

Creating a fields & relationship of loans

SETUP > OBJECT MANAGER

Loan

Details

Fields & Relationships

9 Items, Sorted by Field Label

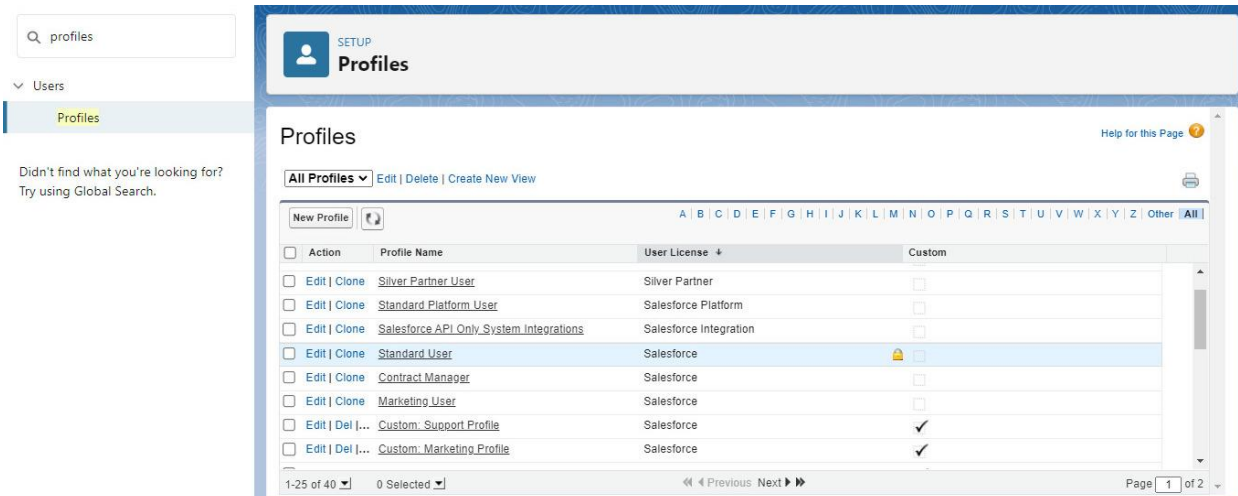
Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
9150412058.90	X9150412058_90__c	Number(10, 2)		
Created By	CreatedById	Lookup(User)		
FORMULA	FORMULA__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
x9345746776	x9345746776__c	Currency(18, 0)		

MILESTONE 6 : PROFILES

Creating profile for users

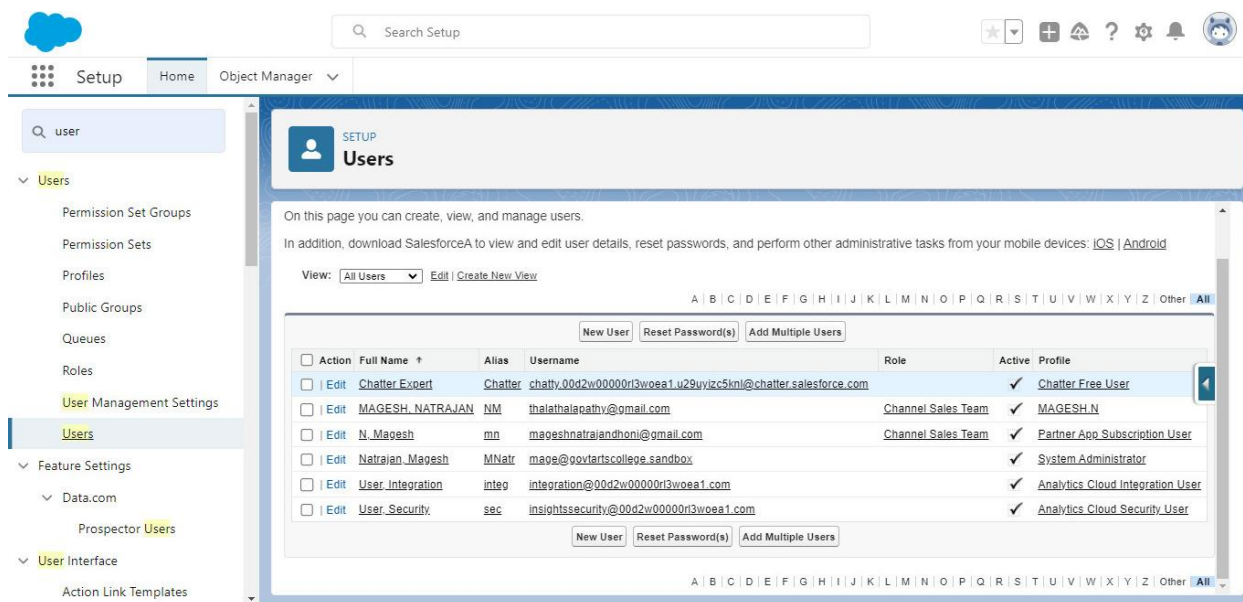


The screenshot shows the Salesforce 'Profiles' setup page. On the left, there's a search bar with 'profiles' and a sidebar with 'Users' and 'Profiles' (selected). The main area is titled 'Profiles' and includes a 'New Profile' button and a table of existing profiles. The table has columns for Action, Profile Name, User License, and Custom. The 'Standard User' profile is highlighted.

Action	Profile Name	User License	Custom
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

MILESTONE 7 : USERS

Creating a users



The screenshot shows the Salesforce 'Users' setup page. On the left, there's a search bar with 'user' and a sidebar with 'Users' (selected) and 'User Management Settings'. The main area is titled 'Users' and includes a 'New User' button and a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The 'Chatter Expert' user is highlighted.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w00000r13w0ea1.u29uyzcskml@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	MAGESH NATRAJAN	NM	thalathalanathv@gmail.com	Channel Sales Team	<input checked="" type="checkbox"/>	MAGESH N
Edit	N. Mapesh	mn	mapeshnatrajandhoni@gmail.com	Channel Sales Team	<input checked="" type="checkbox"/>	Partner App Subscription User
Edit	Natrajan Mapesh	MNatr	mapa@oovtarts.college.sandbox		<input checked="" type="checkbox"/>	System Administrator
Edit	User Integration	inte	integration@00d2w00000r13w0ea1.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w00000r13w0ea1.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

4 TRAILHEAD PROFILE PUBLIC URL :

TEAM LEADER : LONG ABSENT

TEAM MEMBER 1 (TEAM LEAD) : <https://trailblazer.me/id/s941986>

TEAM MEMBER 2 : <https://trailblazer.me/id/vvkamaraj>

TEAM MEMBER 3 : <https://trailblazer.me/id/mnatrajan1>

5 ADVANTAGES & DISADVANTAGES OF THE PROJECT

Advantages

- Saving time
By using the property management application app people can save the time rather than manual searching for buying or rent a property.
- Loan arrangement
Some people's budget is lower than the actual price of the property, even they are interest in buying, renting or lease the property. They looking for a loans. In this app they can get a loan with discount and with clear procedure of getting loan.
- At the place
If the customer want to see the image of the property or contact with the owner of property, easily can access the details in this app at the place where they are.
- Loans
When buyers want to take loan, through this they can easily get the loan.

Disadvantages

- Malpractice
If the customers and owners profile did not cross check properly it may cause the trouble in future.
- Finding
This software should not reach all people and buyers.
They can get doubt about details of property.

6 APPLICATION

Application of property management application

- This software could be used in various ways which are related to the properties such as
 - Buying.
 - Renting.
 - At the lease categories.

7 CONCLUSION

Overall this project is acting as a connecting platform for those who want to buy, rent or lease and sell the property.

Helping the people find out about the property details and know about the features of property.

8 FUTURE SCOPE

Already many websites are active related to this field but this can take the process to the next step.

Because of the digitalizing world this type of application is needed all over the world so the demand for this project is worthy to do.

