

Building Management Project

Acceptance Criteria

AC1: Buildings and Flats should be added and removed by Building Owner/manager only.

AC2: Building owner/manager should be able to add a coordinator.

AC3: Coordinator should be able to create a Contract only when a flat is vacant. Otherwise, he can't create a contract for an occupied flat.

AC4: coordinator can submit new contract for vacant flats for Approval to the build owner.

AC5: Reports and dashboards are visible to the owner and coordinator.

AC6: coordinators can search Contracts by tenant name, builder owner.

Data Model And Security

> The application need to be created with the name of Multi Store building management

> Need to create objects With the Name below :

1. Buildings
2. Flats
3. Contracts

Buildings and its fields

- Name (Text field)
- S.no : (Auto number)
- Address (Text area)

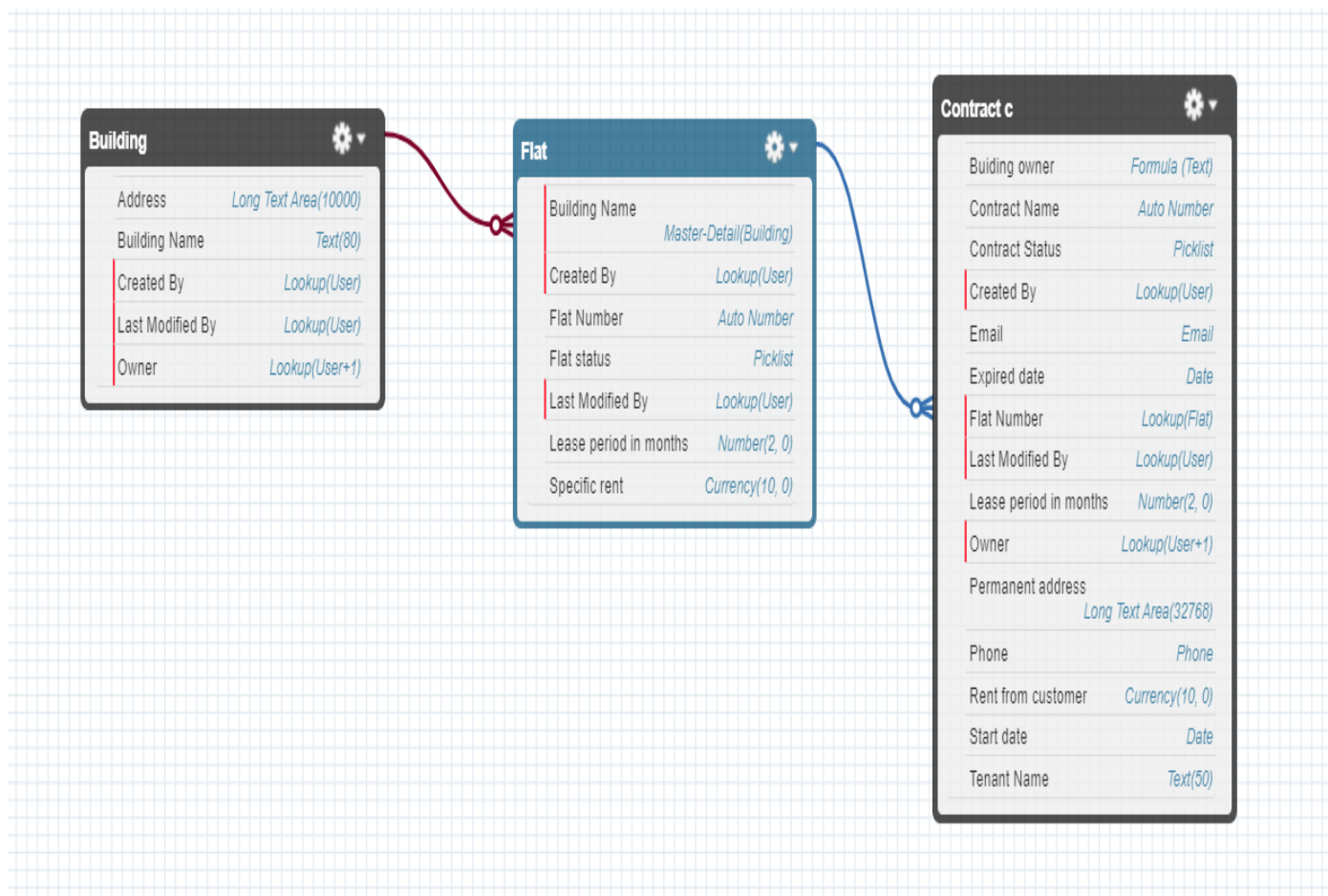
Flats and its fields

- Building name,(Master-detail-relationship for buildings)
- Flatno,(Text field)
- specific rent ,(currency field)
- lease period in months : (number field)
- Status (Picklist field) values : Open(default),contract in progress ,Occupied

Contracts and its fields:

- Flatno : (Look-up relationship)
- Tenant Name : (Text field)
- Age : (number field)
- No.of people living: (number field)
- Price for which he agreed :(currency field)
- Start date : (date field)
- End date : (date field)
- Email id :(Email field)
- Status : (Picklist) - New,submitted for approval , active, Rejected,expired

Relationship:-



Security model

Owd for the buildings will be Private

And Flats is a child so will controlled by parent

And for contracts it will be private

Profile Level

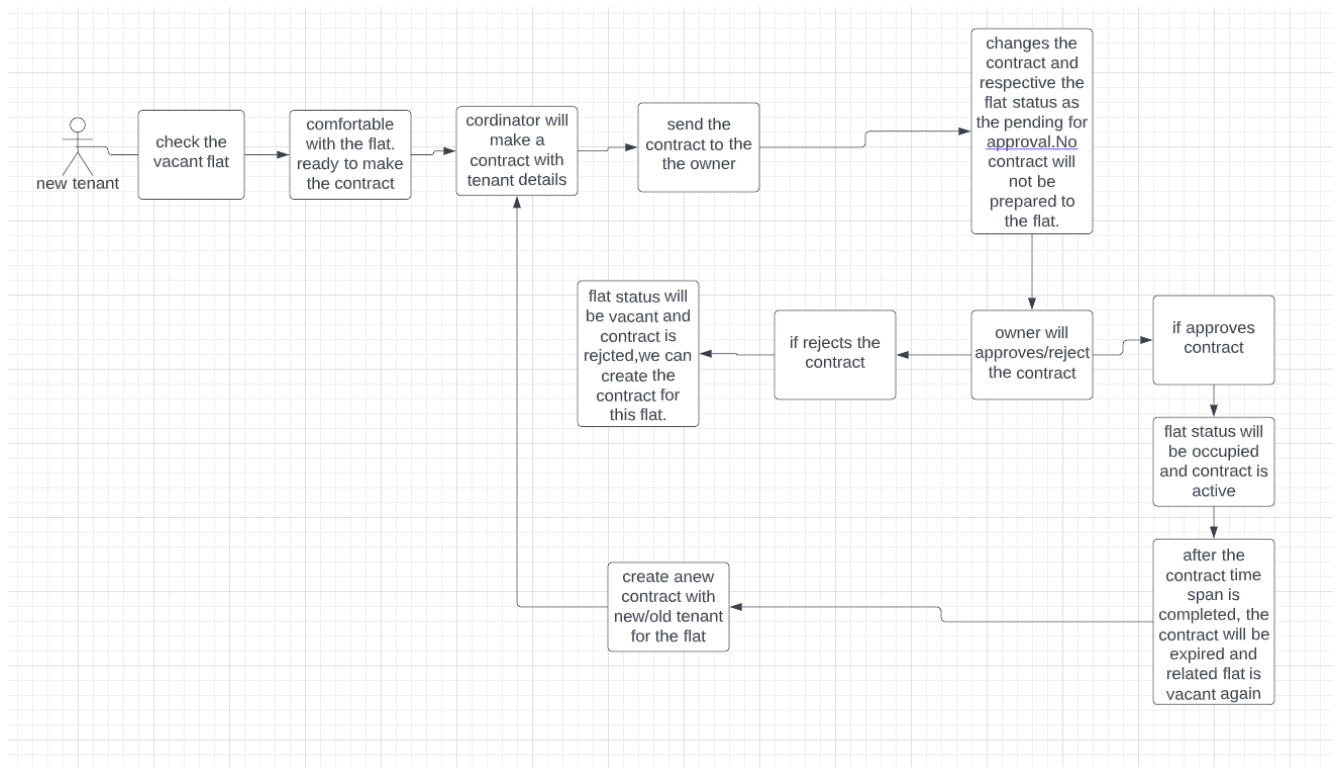
For the owner we have give Only CRED access so, that they could not see others data for all 3 objects

For the coordinators we have given only read access for buildings and Flats and for contracts we will give him CRED access.

Manual sharing

So, by this the owner can add a co-ordinator to the Building manually by restricting him to access certain fields by profile.

Data Flow



The Owner journey :

When ever the owner Login into the system He will open his application that is Multi Store building management Once he open this application the Application consists :

- Home page
- Buildings
- Flats
- Contracts

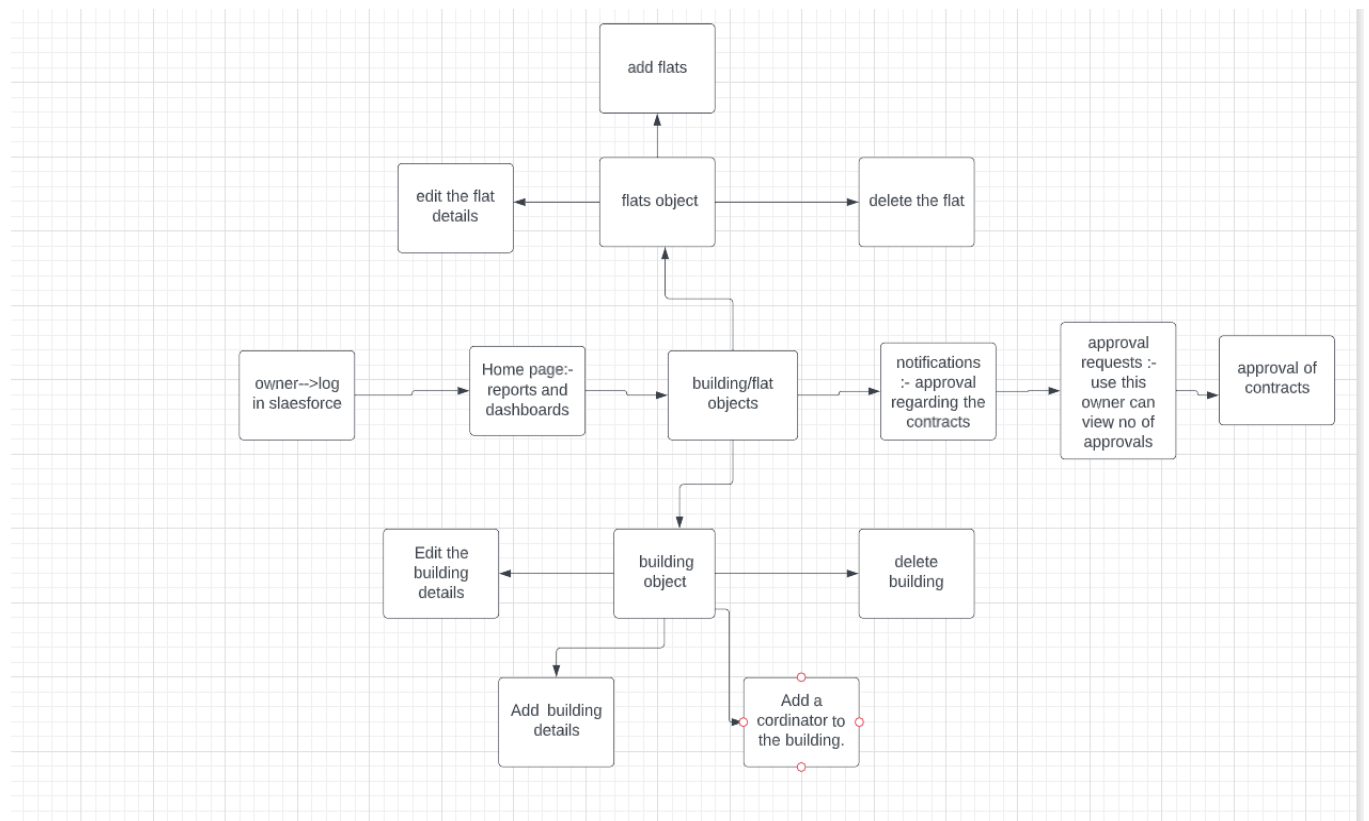
Home page >> We will display here the Reports and dashboards with the details of How many flats are occupied, How many are open , and what is the revenue generated for the flats we have occupied .

Buildings >> Where he can view the buildings which he added and edit the buildings which he added and he can delete and he can add new buildings. And he can also add a co-ordinator to the building by sharing buttons.

Flats >> same here also he can add flats related to buildings which he created , he can edit and delete the flats also.

Contracts >> Here he can see the details of contract and and make approve

And in the notifications bar he can see how many flats are coming for approval and check the details and he can take the decision to 'approve' or 'reject'.



The Co-ordinator journey :

When ever the co-ordinator will login into the system he can view only Building & flats

Which are assigned to him and he can edit the data in the contracts.

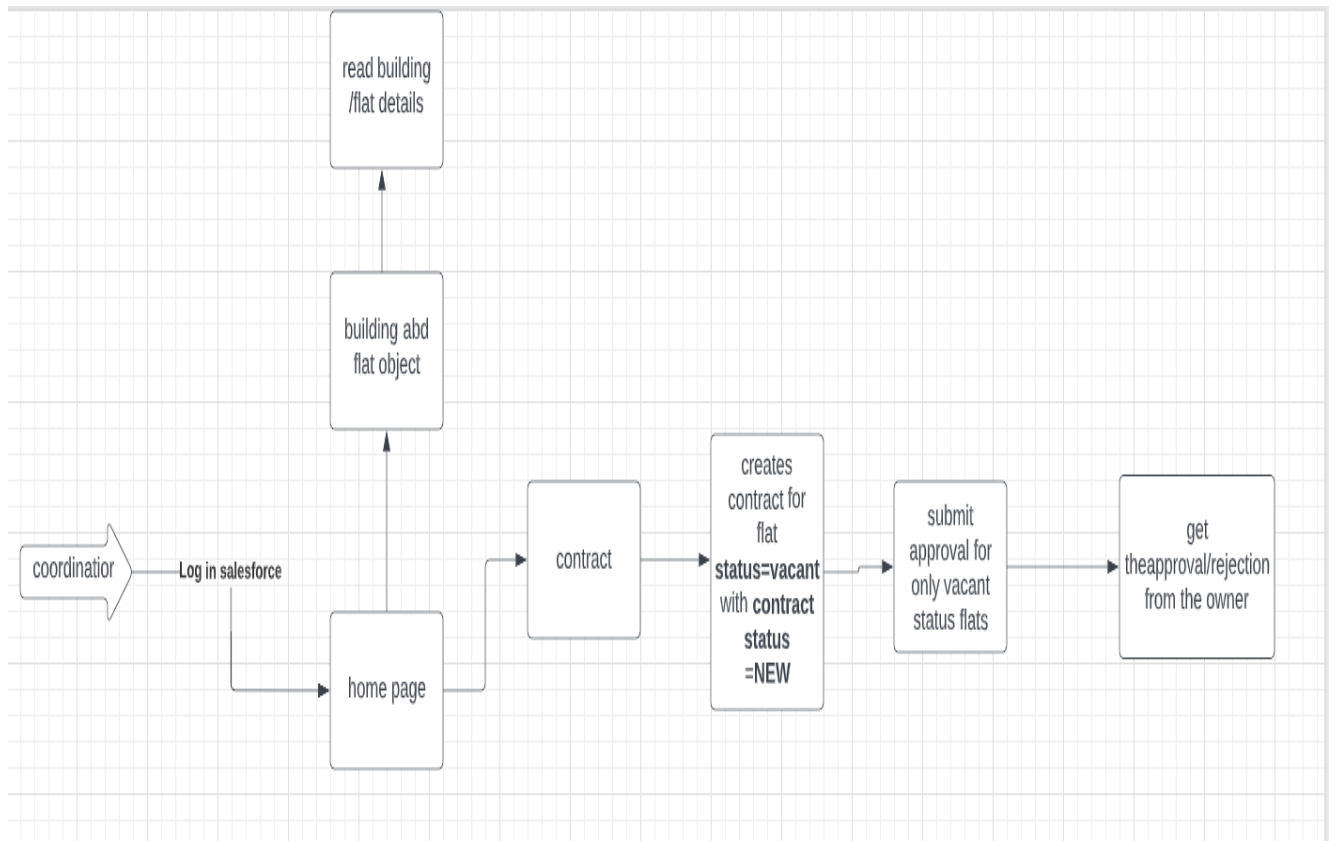
- whenever he creates contract for the flat the status of the flat will be new, If it is new only the coordinator can send for approval

1.Once it is sended for approval the status of the Contacts will be changed to 'Submit for approval' and the status in the flats will be updated 'Contracts in progress'

2.once it is approved it will change to 'Approved' and it will update the start date to Approved date if the start date is in future then start date will remain the same

In flats and in in flats it will change to occupied

3.if it is rejected the status will be changed 'Rejected' and in flats it will change to 'open' and make the start date to blank.



Search contracts:-

Created a VF page and apex class to search the contracts By Owner.

Added that vf page to the tab and made that visible

Auto-machine to build for this

Approval Process :

Create an approval process on contract objects.

Criteria for sending for approval : Status should be new.

Initial submission action : update status field to 'Submit for approval'.

Approval action : Field updates >>

1.update status field to 'Approved'.

Email alert:

Send the email to the customer based on the email
field on Contracts.

Send the email to the Coordinator.

Reject action : Field updates >>

1.update status field to 'Rejected'.

Email alert:

Send the email to the customer based on the email
field on contracts.

Send the email to Coordinator

Process Builder :

Create the process builder for flats whenever record is created and edited

Criteria for action :

If start date is changed

Action : update records

Update end date based on formula
(ADDMONTHS(Startdate,lease period in months))

2.Create the process builder on contracts whenever a record is created and edited.

> Criteria for action :

If the status equals to 'Submit for approval'

Action

> Criteria for action :

If the status equals to 'Approved' : update records

Update the related flat record status to 'contract in progress'.

Action : update records

Update the related flat record status to 'Occupied'.

Update the related flat record start date to 'today date'.

> Criteria for action :

If the status equals to 'Rejected'

Action : update records

Update the related flat record status to 'Open'.

Update the related flat record start date to 'Null'.

Workflow Rule :

Create a Workflow Rule on Flats select

Evaluate the rule when a record is: created, and any time it's edited to subsequently meet criteria

Criteria :

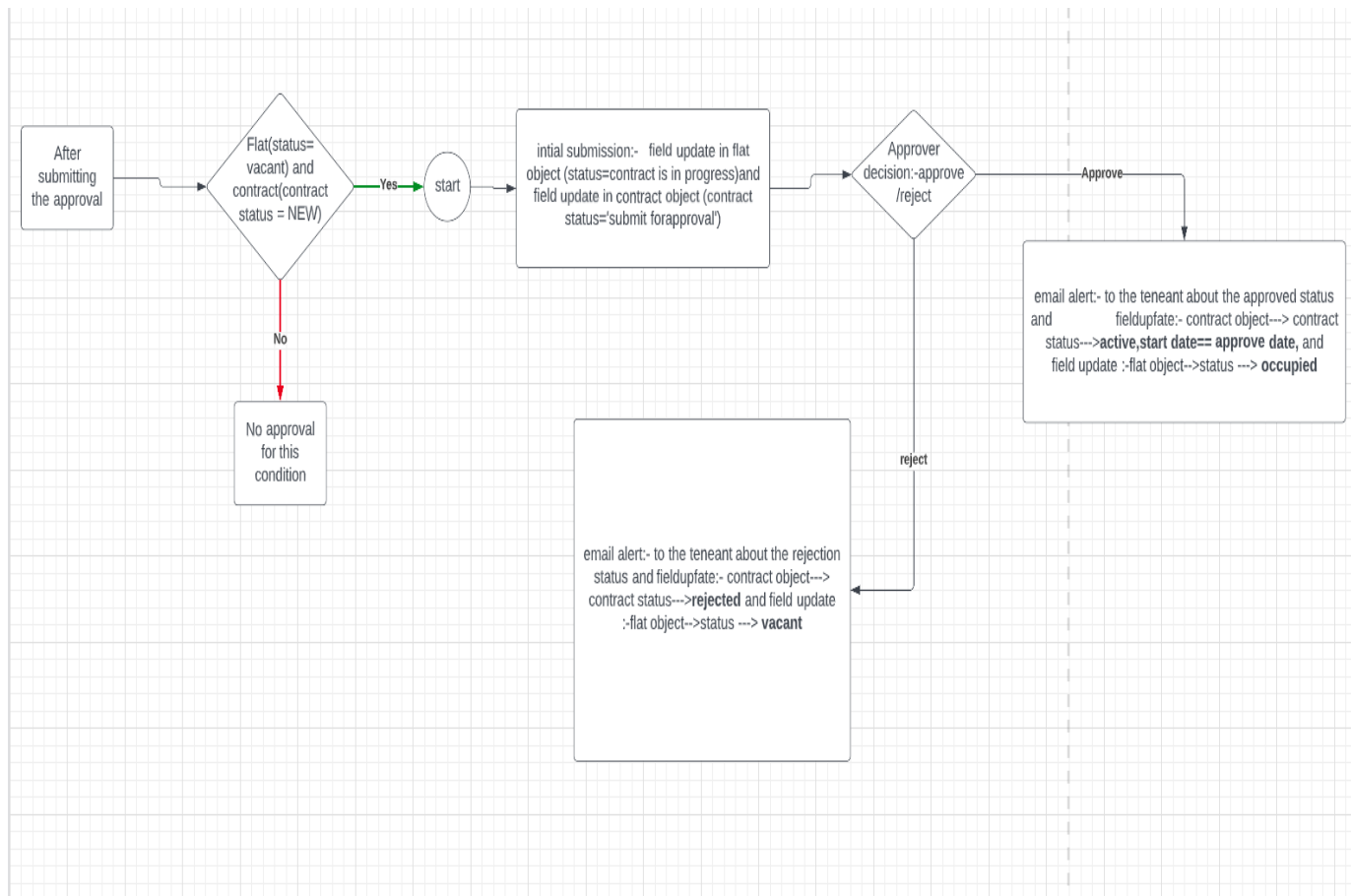
Status is Equal to Occupied

Action:

Take time-dependent action

Before 1 day of the end date : send an email alert to Account owner and the coordinator.

Before 1 day of end date : update Status field to Open.



Reports & dashboard information

Create a report type on Buildings and flats and use that report type and Build a report with Below criteria

- Reports
 - i. Total Flats per Building:-
 - ii. Total Vacant Flats per Building
 - iii. Total Revenue Generated by Each Tenant per Building per Flat.

1.create a summary report and make the building name in the summarized row

it will get the total flats for each building.

2. add flat status to the above summarized row

we can view the flats with respect to the flatstatus like vacant,contract is in progress,occupied

3. add the rental amount for the tenant in the same report to get the total revenue generated from each building/flat.

4. add components to this report with view as donut,table,bar etc.. options provided in the component section.
5. add these components to the dashboard.

And create Dashboard for above report :

Create a homepage and add this Reports and dashboards to the home page
Add that homepage to the Multi Store building management Application for owner and coordinator profile.