NMS-PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

Team Members

JEYAKRISHNA G(IV - CSBS)

PRASANTH R(IV - CSBS)

MADHAVAN S V(IV - CSBS)

SHANKAR M(IV - CSBS)

GUIDE: VENKATARAMANEN AP/CSBS
MENTOR: VENKATARAMANEN AP/CSBS

What is Salesforce ?

- Salesforce is a popular cloud-based customer relationship management (CRM) platform that helps businesses manage their relationships and interactions with customers and potential customers. It offers a wide range of tools and features for sales, marketing, customer service, and more.

- Salesforce allows businesses to store customer data, track leads and opportunities, automate various tasks, and provide a unified view of customer information to improve overall business efficiency and customer satisfaction. It is widely used across various industries to streamline processes and enhance customer engagement.

Property Management App

- 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 the user can get it and also the clear reports and dashboards are visualized.

- This project has **14 milestones** to successfully complete the Property Management app.

1. Creation of Developer Account

- A Developer org has all the features and licenses you need to get started with Salesforce.1.Search developer.salesforce.com/signup

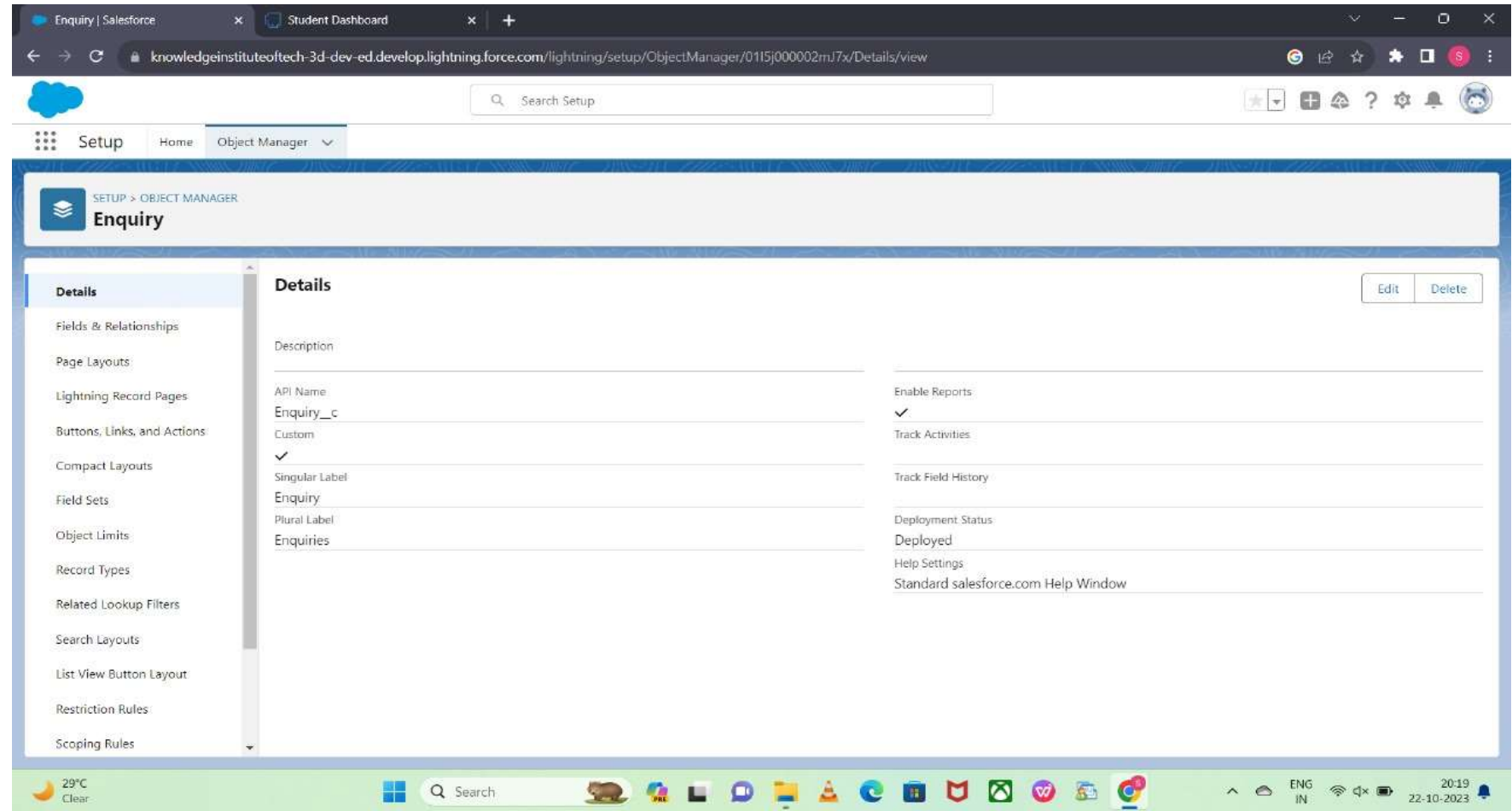# 2. Object Creation

What is an Object?

In Salesforce, an object is a data structure representing a table storing specific information, comprising fields and records, crucial for efficient data management and organization.

Two Types

- Standard Objects: - Predefined entities like Accounts and Contacts in Salesforce, catering to common business needs without extensive customization.

- Custom Objects: - User-defined entities allowing businesses to create tailored data structures, enabling unique data storage and specialized application development.
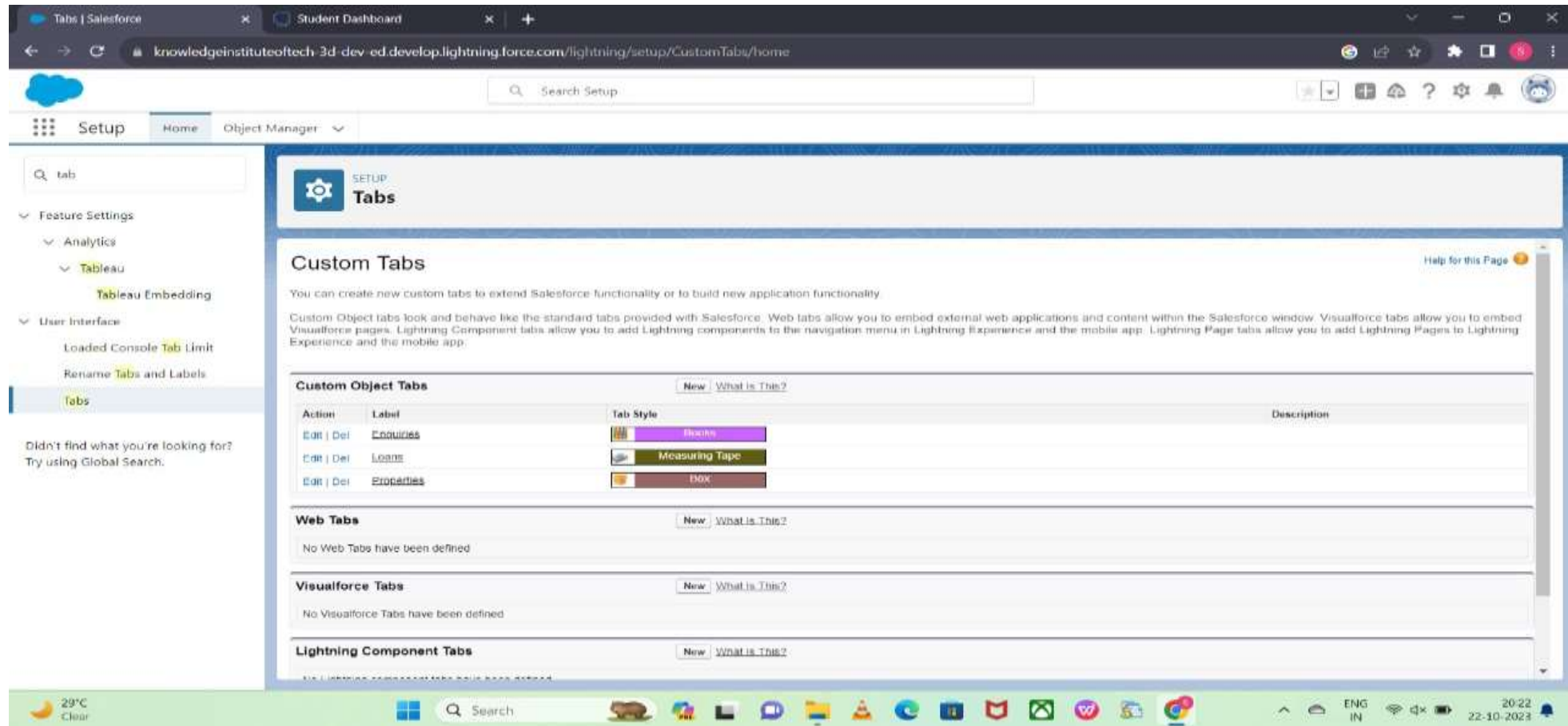
In this Application we use some Custom Objects

- Enquiry
- Property
- Loan
- Reports
- Dashboards

3. Tabs Creation

Tabs in Salesforce are sections for navigation, providing access to data and functions. They organize standard, custom objects, Visualforce, Lightning components, and web pages.

4. Create App

- Salesforce offers standard (Sales Cloud), custom, and third-party apps through AppExchange.

- These include mobile, community, and integration apps, empowering businesses with versatile solutions for CRM, collaboration, and efficiency.
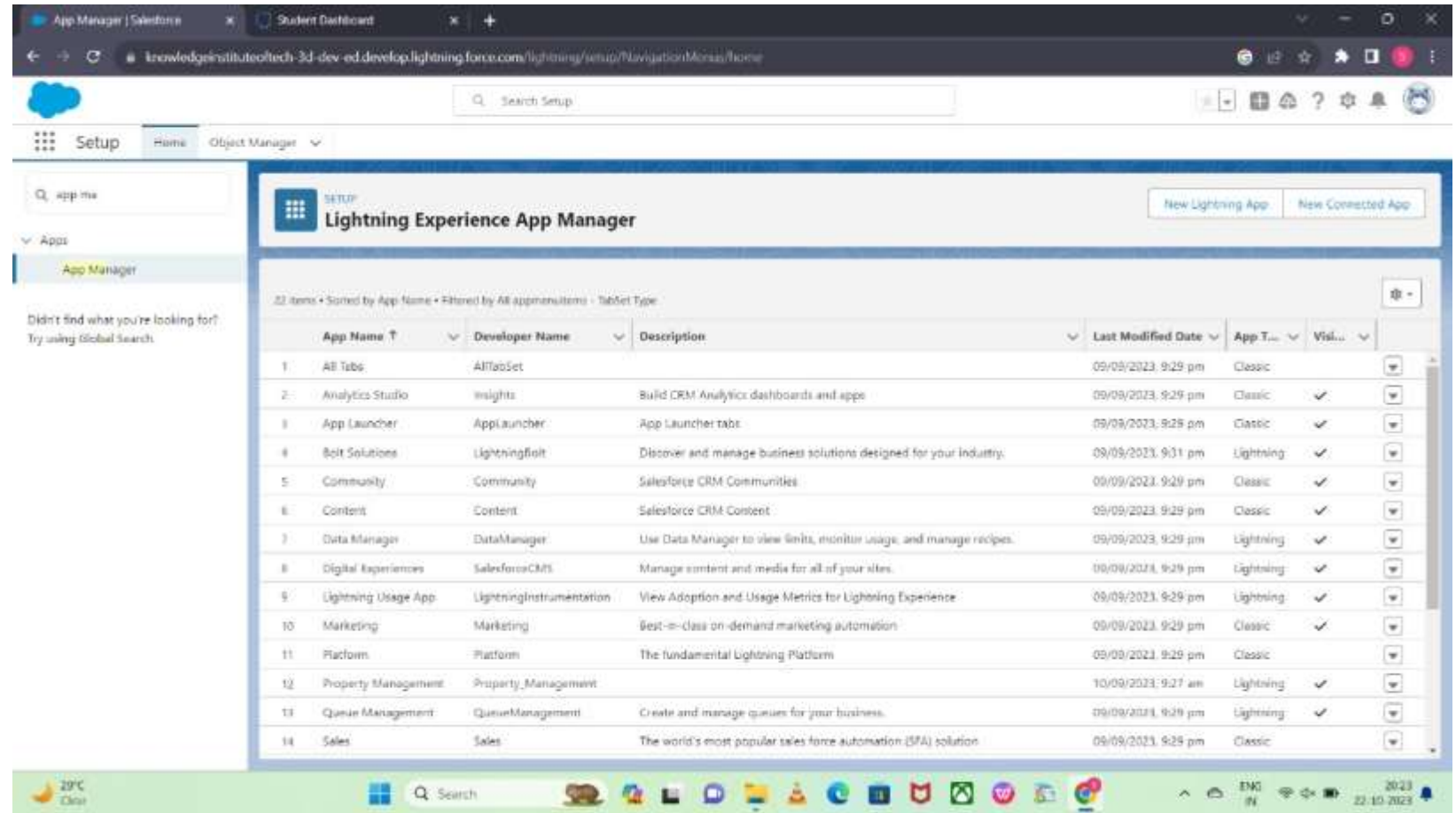
5. Fields & Relationships

- Salesforce fields store diverse data types: text, numbers, dates, picklists, checkboxes, formulas, lookups, and more.

- They organize information within records, crucial for efficient CRM management.
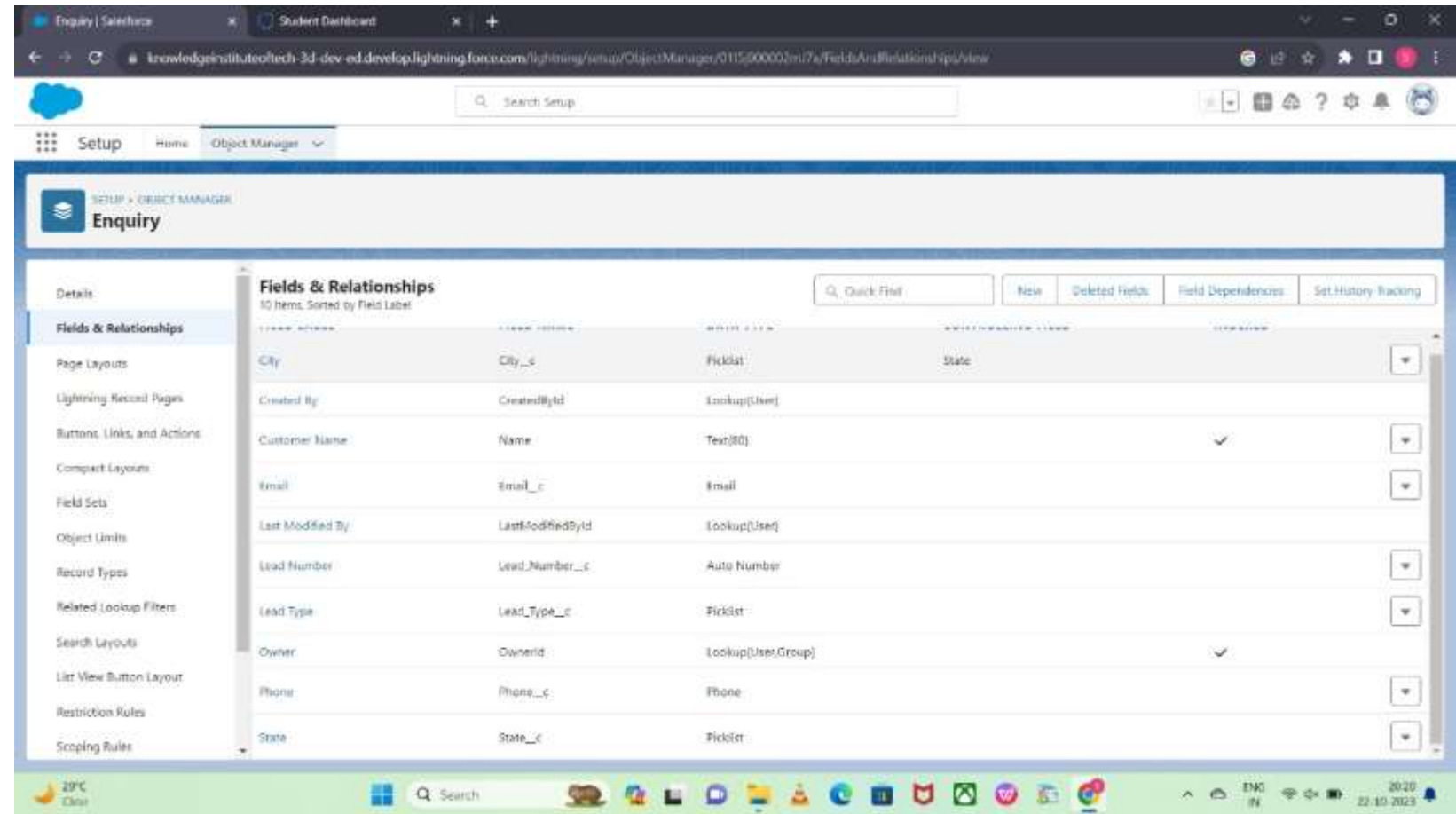
6. Record Types

- Record types in Salesforce enable customized user experiences.
- They define distinct page layouts, picklist values, and business processes based on user profiles.
- By assigning different record types to records, organizations can streamline data entry, ensuring relevant information is captured for various contexts.
- This flexibility enhances user efficiency and allows businesses to adapt Salesforce to their specific needs, optimizing workflow and data management across diverse teams and processes.

7. Profile

- Salesforce profiles manage user permissions, controlling access to objects, fields, and record actions.

- They're crucial for data security and maintaining organization-specific data integrity and functionality.
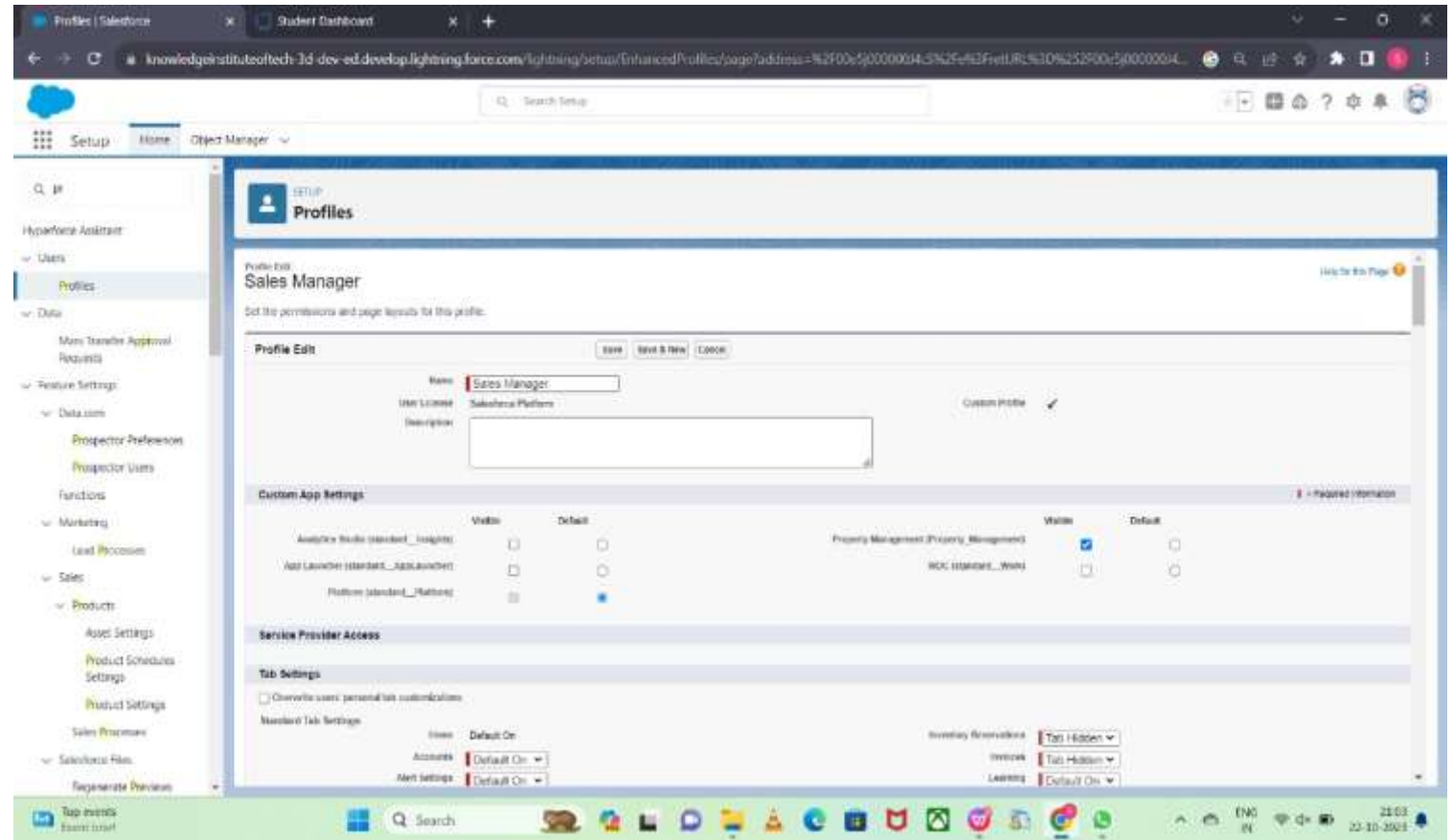
8. User Adoption

- User adoption in Salesforce refers to the extent to which employees effectively use Salesforce within an organization.

- It's crucial for maximizing the benefits of the platform.

- Successful adoption involves comprehensive training, intuitive design, clear communication of its benefits, and addressing user concerns.

- Regular feedback, support, and ongoing training can further enhance adoption rates among users.

9. Organization Wide Default (OWD)

- OWD refers to the baseline level of access that all users in an organization have to records, regardless of the ownership or sharing settings. OWD settings determine the default level of access for objects in Salesforce, such as Accounts, Contacts, Opportunities, etc.

- There are three main OWD options:

   1. Private: In this setting, only the record owner and users above them in the role hierarchy can access the record.

   2. Public Read-Only: All users can view the records, but only the owner and users above them in the hierarchy can edit.

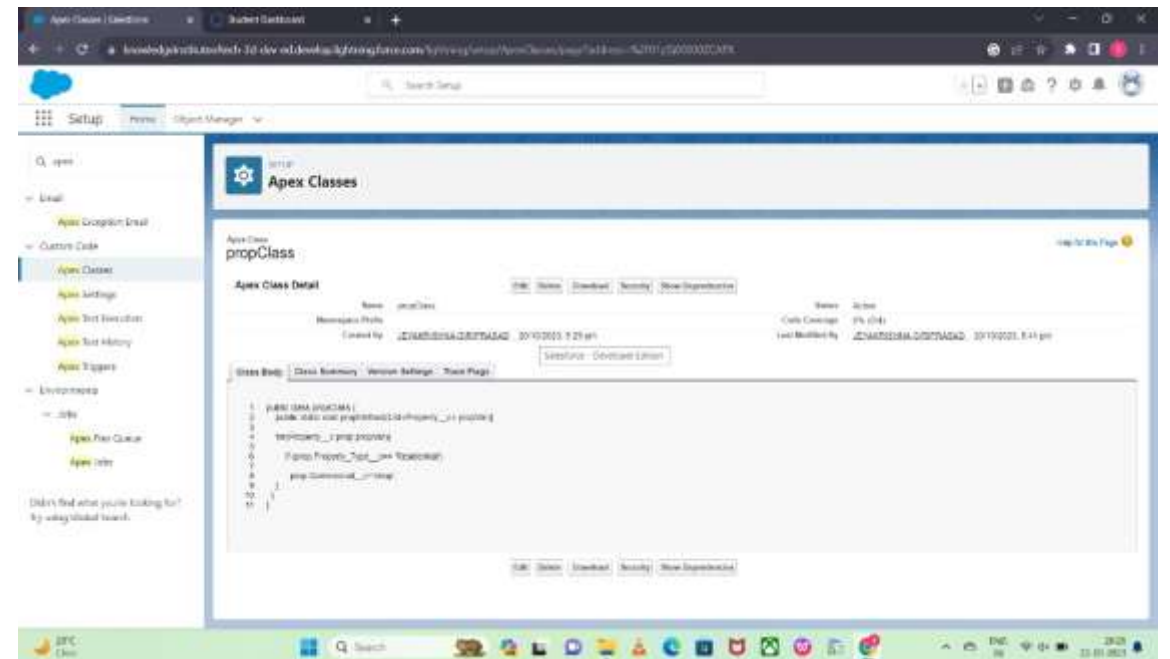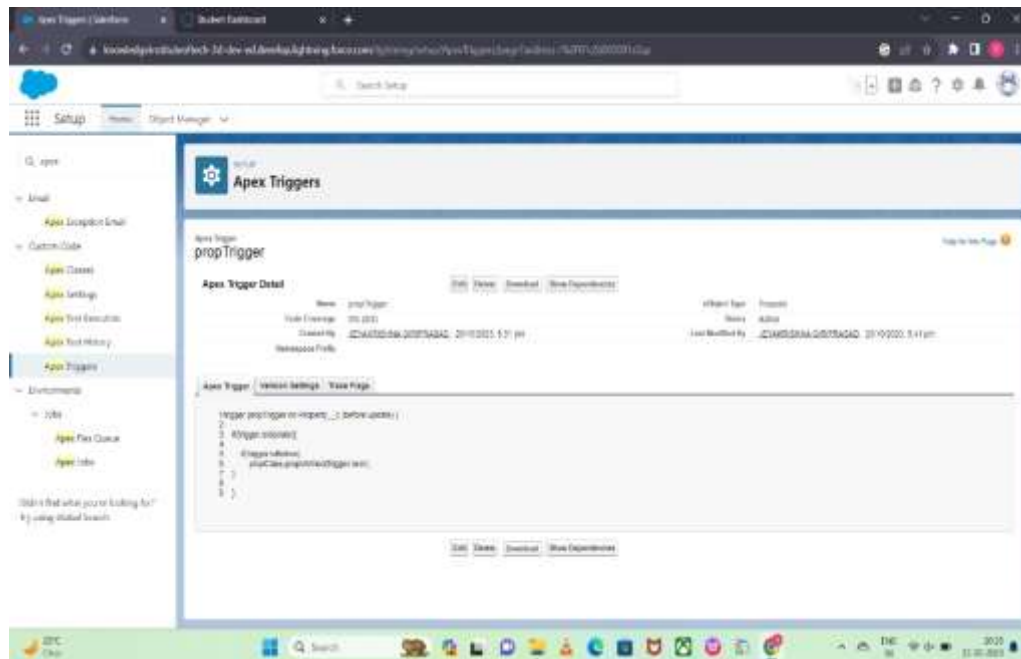   3. Public Read/Write: All users can view and edit the records.

10. Reports

- Salesforce reports analyze data with customizable formats, filters, and charts.

- Users create insightful reports and dashboards, enabling informed decisions and enhancing overall organizational efficiency.
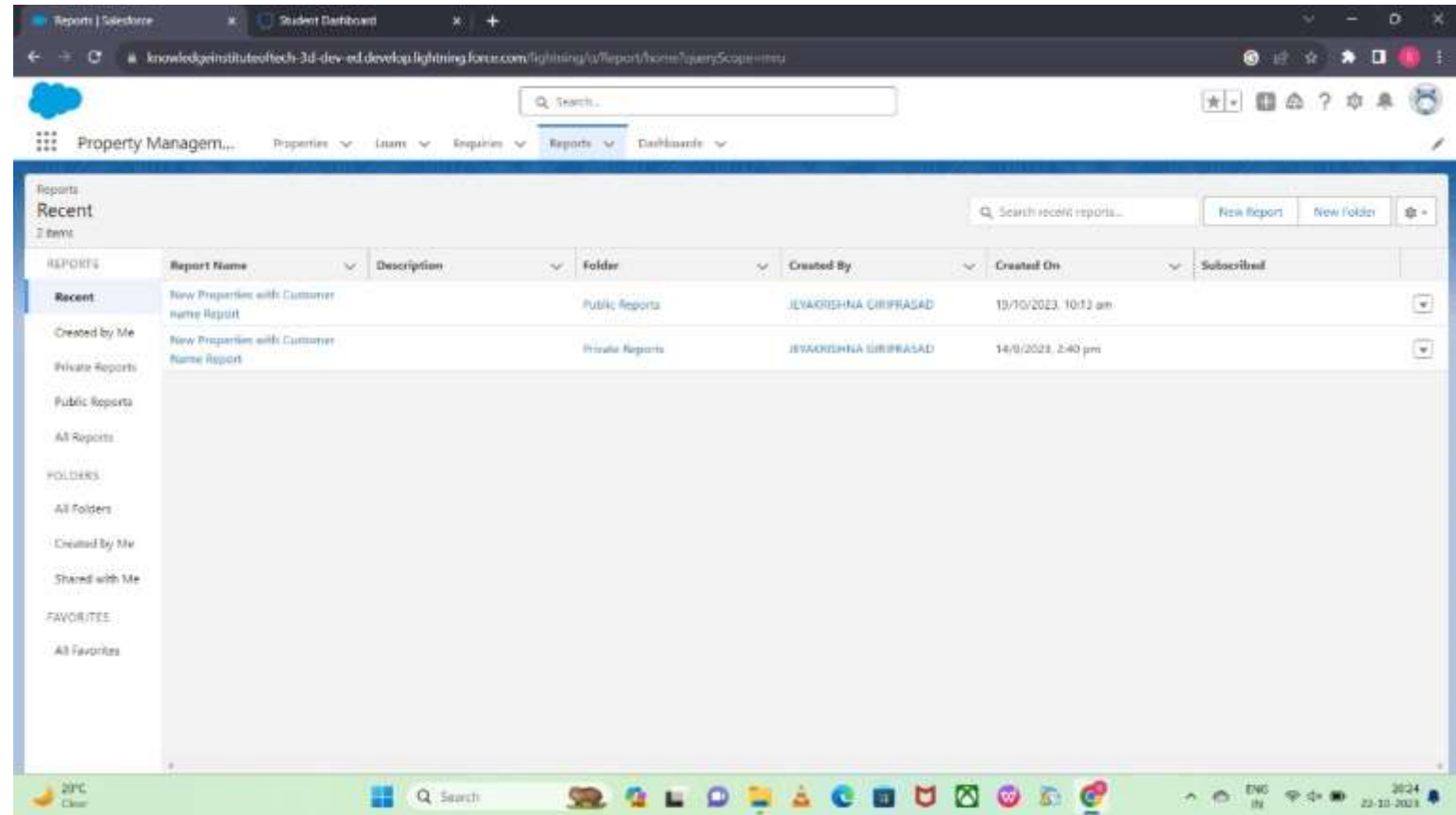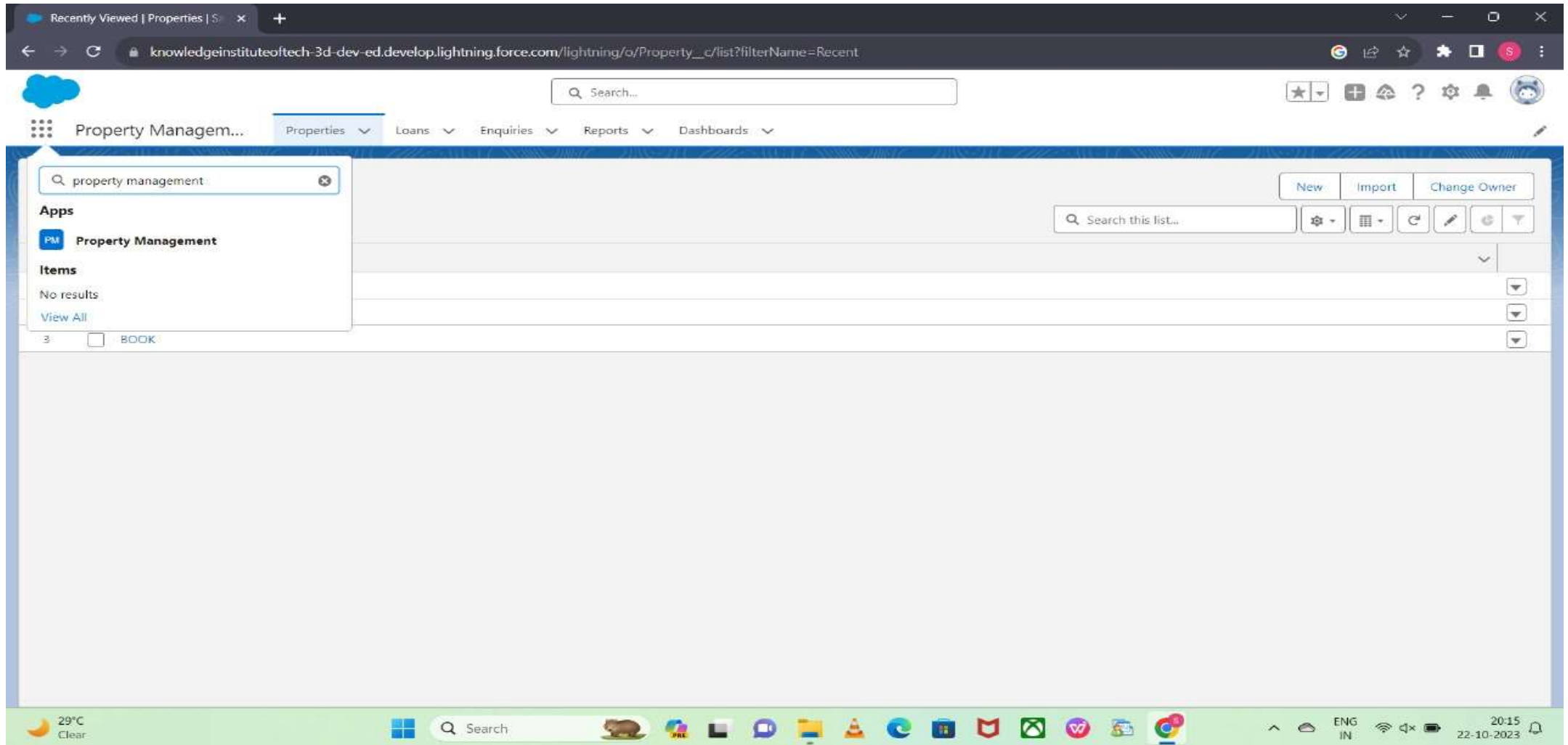
11. Apex Triggers

- Apex triggers in Salesforce execute custom code before/after events like record insertion, updating. They handle bulk operations, enforce rules, and ensure data integrity efficiently.

App Launcher

THANK YOU