

# 1 INTRODUCTION

## 1.1 Overview:

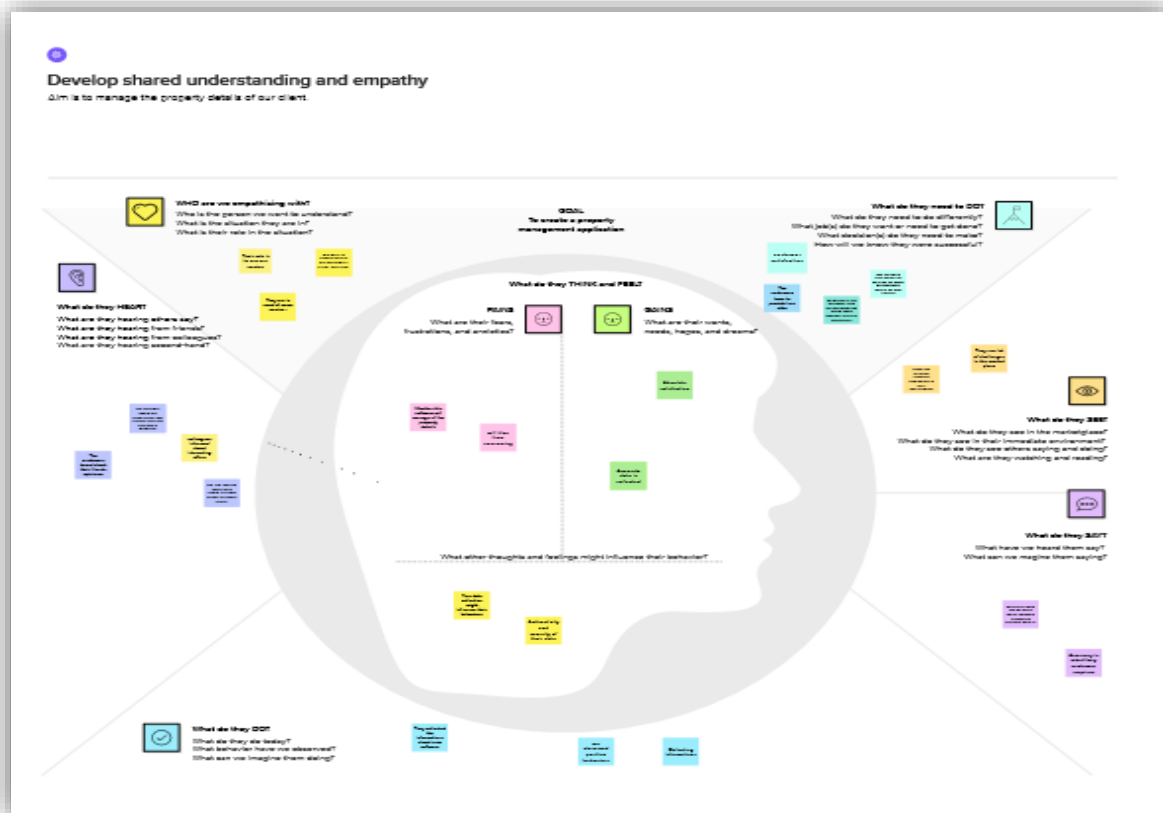
Develop an app for the property management where buyer can order his requirements and get the appropriate details of the property. According to his interest just provide him with some discounts up to what extent he can get the discount. Also track whether he is interested in taking the loan available for so just calculate how much loan amount user can get it.

## 1.2 Purpose

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.

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map



### 2.2 Ideation & Brainstorming Map

### 1

#### Clarify your problem statement

To assess innovative software to manage property details

WU Innovation

Business opportunity

#### Key rules of brainstorming

To use our creative and productive resources

- Brainstorming
- Brainstorming with others
- Brainstorming
- Brainstorming
- Brainstorming
- Brainstorming

### 2

#### Brainstorm

collaborative management process the property details

WU Innovation

**Tip:** You can include a sticky note to capture the general idea of the problem statement.

Process 1

1	2	3
4	5	6
7	8	9

Process 2

1	2	3
4	5	6
7	8	9

Process 3

1	2	3
4	5	6
7	8	9

Process 4

1	2	3
4	5	6
7	8	9

Process 5

1	2	3
4	5	6
7	8	9

Process 6

1	2	3
4	5	6
7	8	9

### 3

#### Group ideas

Type your paragraph

WU Innovation

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### 4

#### After you brainstorm

You can save the result as an image or get a summary of the results of your brainstorming.

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**Tip:** You can include a sticky note to capture the general idea of the problem statement.

Process 1

1	2	3
4	5	6
7	8	9

Process 2

1	2	3
4	5	6
7	8	9

Process 3

1	2	3
4	5	6
7	8	9

Process 4

1	2	3
4	5	6
7	8	9

Process 5

1	2	3
4	5	6
7	8	9

Process 6

1	2	3
4	5	6
7	8	9

### 3 RESULT

#### 3.1 Data Model:

Object Name	Fields in the object	
Lead	Lead	Auto Number
	State	Text
	City	Pick list
	Email	Text
	Phone	Number
Buy	Property Type	Pick list
	Discount	Percent
	State	Text
	City	Pick list
	Annual Amount	Number
Rent	Rent	Number
	Rental City	Text
	BHK	Pick list
Loan	Loan ID	Auto Number
	Interest Rate	Currency
	Term	Number
	Annual loan	Number
	Total Loan	Number
	Installments	
	Loan Repayment	Number
	Loan Amount	Formula

### 3.2 Activity & Screenshot

#### Milestone 1-Salesforce

Salesforce is a customer success platform , designed to help sell , service , market , analyze , and connect with the customers.

#### Milestone 2-Object

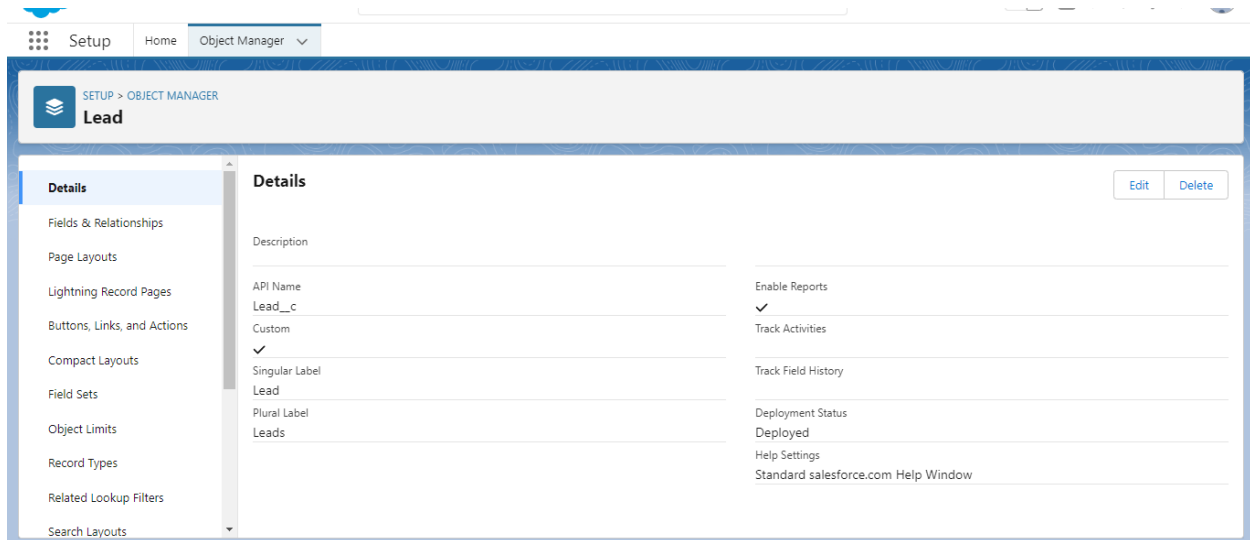
Sales force objects are database tables that permits to store data that is specific to an organization .

This screenshot shows the Salesforce Setup interface for the 'Loan' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main header displays 'SETUP > OBJECT MANAGER' and the object name 'Loan'. A left sidebar lists configuration categories: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The 'Details' section is active, showing a table of object properties. The table has two columns: the first for basic object information and the second for reporting and tracking settings. The 'Loan' object is configured with a custom API name 'Loan\_c', singular label 'Loan', and plural label 'Loans'. Reporting settings include 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). The deployment status is 'Deployed', and a link to 'Standard salesforce.com Help Window' is provided.

Property	Value
Description	
API Name	Loan_c
Custom	✓
Singular Label	Loan
Plural Label	Loans
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	<a href="#">Standard salesforce.com Help Window</a>

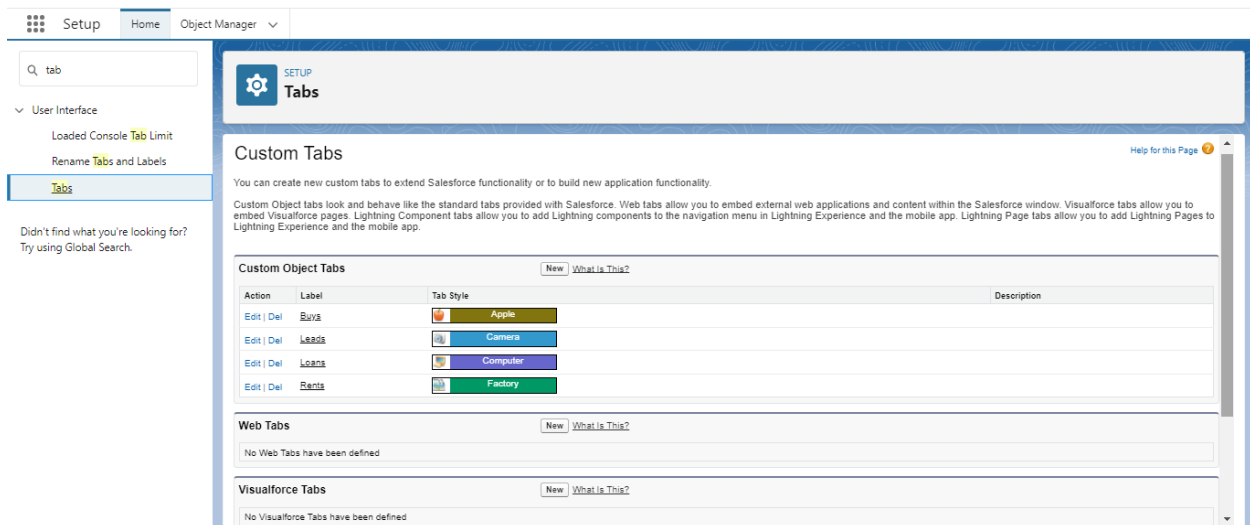
This screenshot shows the Salesforce Setup interface for the 'Rent' object. The layout is identical to the 'Loan' object view. The main header displays 'SETUP > OBJECT MANAGER' and the object name 'Rent'. The 'Details' section shows the configuration for the 'Rent' object. The API name is 'Rent\_c', the singular label is 'Rent', and the plural label is 'Rents'. Reporting settings include 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). The deployment status is 'Deployed', and a link to 'Standard salesforce.com Help Window' is provided.

Property	Value
Description	
API Name	Rent_c
Custom	✓
Singular Label	Rent
Plural Label	Rents
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	<a href="#">Standard salesforce.com Help Window</a>



## Milestone 3-Tab

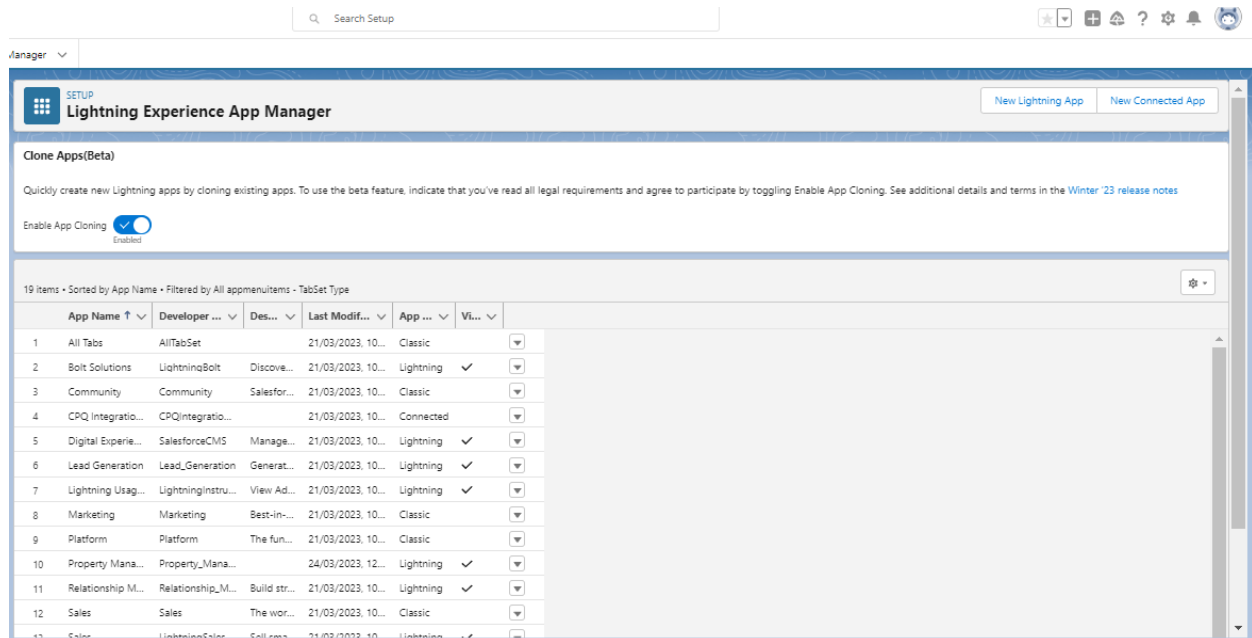
A tab is like a user interface that is used to build records for objects to view the records in the objects.



## Milestone 4- The Lightning app

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps brand the apps with a custom color and logo. We can even include a utility bar and Lightning page tabs in the Lightning app. Members of org can work more efficiently by easily switching between apps.




## Milestone 5-Fields


When we discuss Salesforce , Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that is required for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

## Types of Fields

- Standard Fields
- Custom Fields



Search Setup



SetupHomeObject Manager


Setup > OBJECT MANAGERBuy

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping Rules


Fields & Relationships9 Items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Amount To Be Paid	Annual_Amount_To_Be_Paid__c	Number(18, 0)		
Buy Name	Name	Text(80)		✓
City	City__c	Text(16)		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Property type	Property_type__c	Picklist		
State	State__c	Picklist		



Search Setup



SetupHomeObject Manager

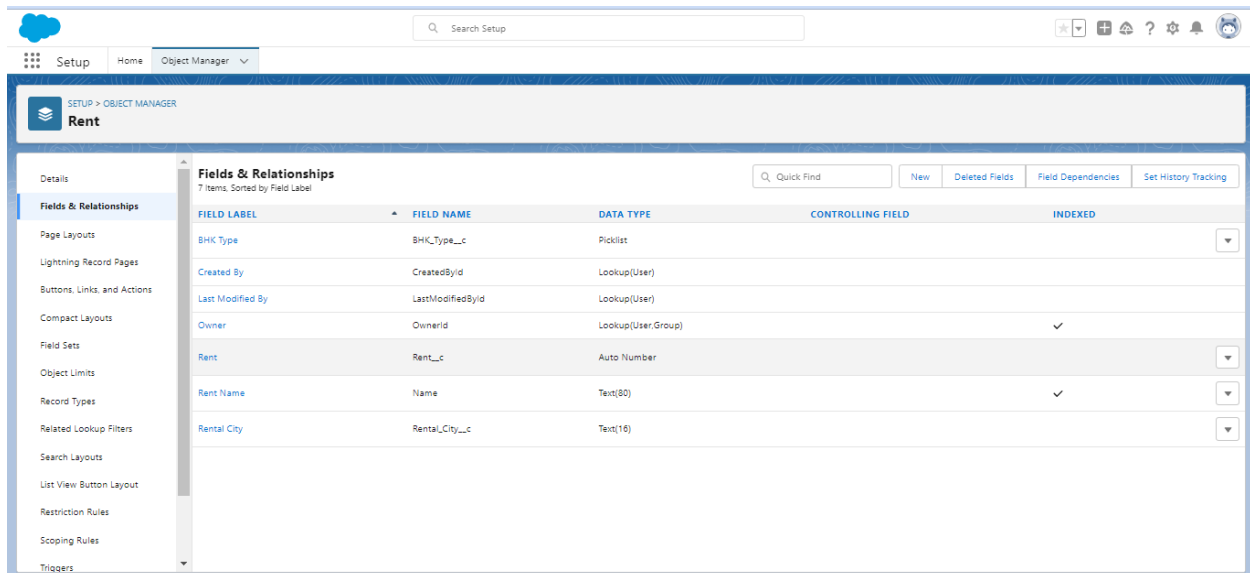
Setup > OBJECT MANAGERLead

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesTriggers

Fields & Relationships9 Items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Picklist		
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		



Setup > OBJECT MANAGER  
Rent

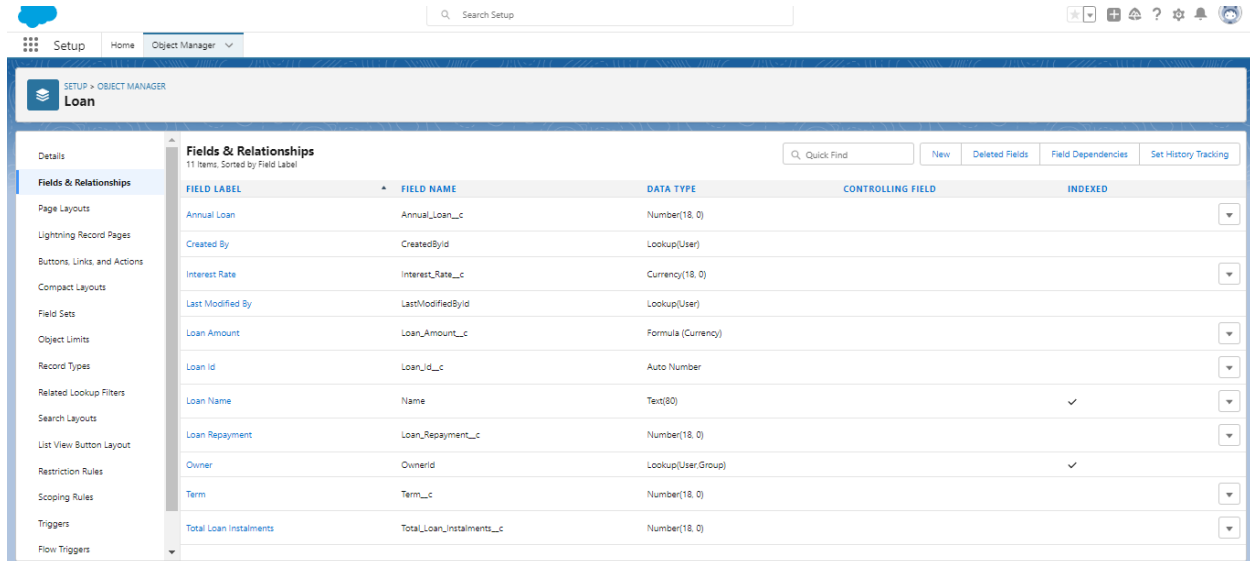
Details

**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
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(16)		

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



Setup > OBJECT MANAGER  
Loan

Details

**Fields & Relationships**  
11 Items, Sorted by Field Label

Quick Find: [ ] New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan Id	Loan_Id__c	Auto Number		
Loan Name	Name	Text(80)		✓
Loan Repayment	Loan_Repayment__c	Number(18, 0)		
Owner	OwnerId	Lookup(User:Group)		✓
Term	Term__c	Number(18, 0)		
Total Loan Instalments	Total_Loan_instalments__c	Number(18, 0)		

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  
Flow Triggers

## Milestone 6-Profile

\*A profile is a group of settings and permissions that define what a user can do in salesforce .

\*The profile controls are Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.



Search Setup

Manager

## SETUP Profiles

### User Profiles

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

[New](#)

Action	Name	User License	Custom
<a href="#">Edit</a>	<a href="#">Chatter External User</a>	Chatter External	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Chatter Free User</a>	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Chatter Moderator User</a>	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Contract Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">CPQ Integration User</a>	CPQ Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">End User</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Identity User</a>	Identity	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Marketing User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Minimum Access - Salesforce</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Profile 1</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Solution Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Standard User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">System Administrator</a>	Salesforce	<input type="checkbox"/>

## Milestone 7-New User

- \*A user is anyone who login to Salesforce. Users are employees at your company, such as sales representatives, managers, and IT specialists, who need access to the company's records.
- \* Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Search Setup

ect Manager

## SETUP Users

### All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [All Users](#) | [Edit](#) | [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty_00d2w00000rgqzheaf6l0vukkiy13y@chatter.salesforce.com			<input type="checkbox"/>	<a href="#">Chatter Free User</a>
<a href="#">Edit</a>	Karmegam	s	bablubab3510@gmail.com			<input checked="" type="checkbox"/>	<a href="#">Identity User</a>
<a href="#">Edit</a>	S. Karmegam	KS	bablubab3510-6gbm@force.com	13/04/2023, 4:25 pm		<input checked="" type="checkbox"/>	<a href="#">System Administrator</a>
<a href="#">Edit</a>	Soonor, Exec	esoon	execsponso.d4mfunnxgq49.du9owghn\$hr@force.com			<input type="checkbox"/>	<a href="#">End User</a>

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

## Milestone 8-Permission Set

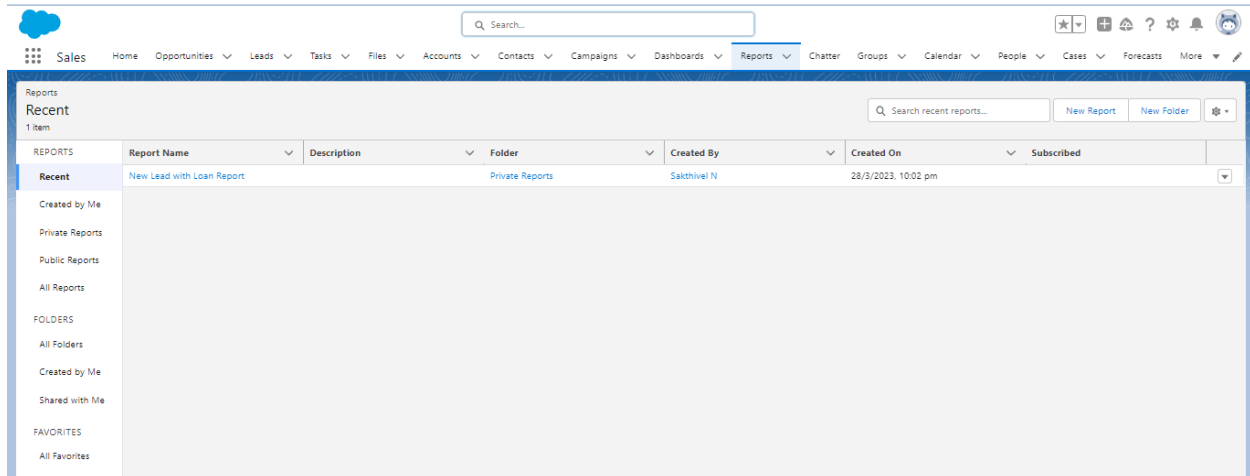
\*A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'permis' and a navigation menu with 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Permission Sets' and includes a search bar, a 'New' button, and a table of existing permission sets. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists several permission sets, including 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', and 'FieldServiceMobileStandardPermSet'. The bottom of the page shows '1-25 of 28' and 'Page 1 of 2'.

Action	Permission Set Label	Description	License
<a href="#">Clone</a>	Buyer	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<a href="#">Clone</a>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<a href="#">Clone</a>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<a href="#">Clone</a>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<a href="#">Clone</a>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Con...	Service Cloud Voice User
<a href="#">Clone</a>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<a href="#">Clone</a>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers t...	Service Cloud Voice User
<a href="#">Del</a>   <a href="#">Clone</a>	Experience Profile Manager		Salesforce
<a href="#">Clone</a>	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Facility Manager
<a href="#">Clone</a>	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. ...	Field Service Mobile

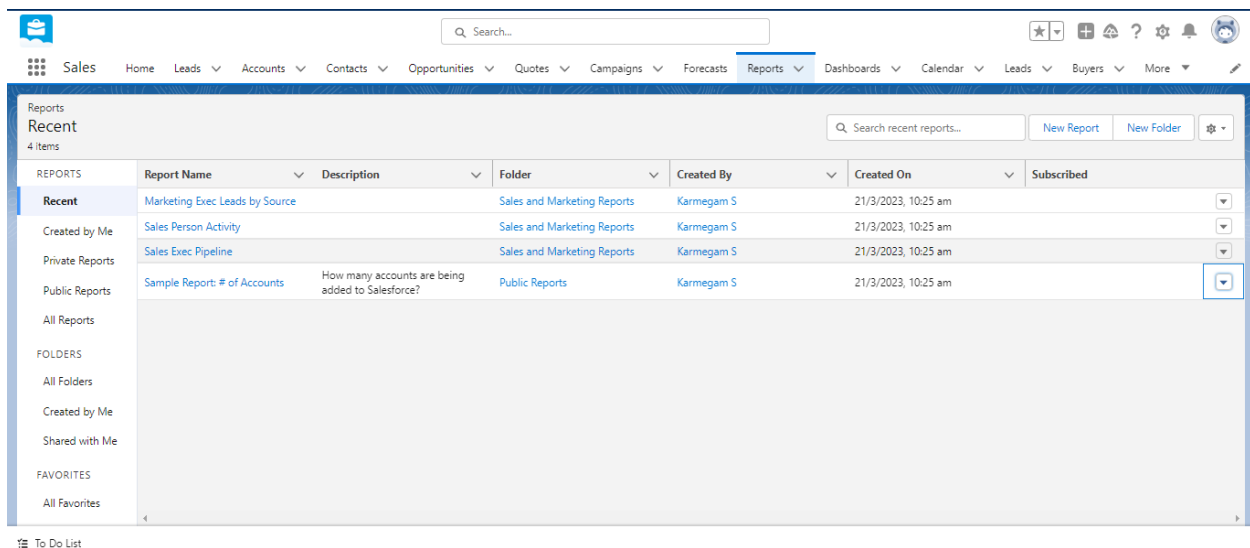
## Milestone 9-Setup For OWD

Organization-Wide Defaults, or OWDs, are the pattern security rules that can follow for Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM.



## Milestone 10-Report

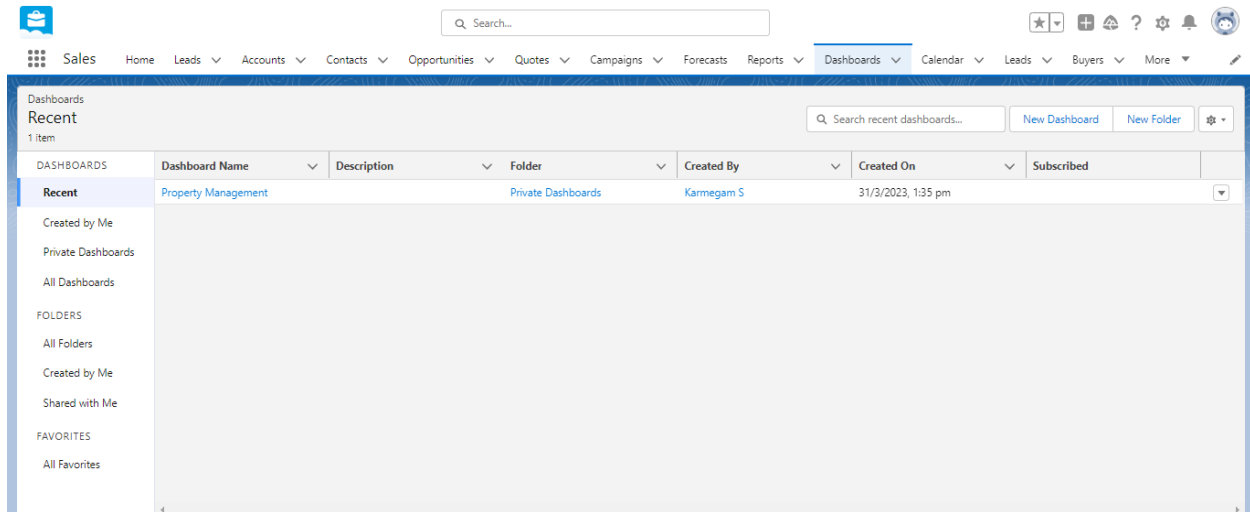
Reports give you access to your Sales force data. We can examine our Sales force data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading , and sharing reports, review these reporting basics.



## Milestone 11-Dashboards

Dashboards help us to visually understand changing business conditions so that we can make

decisions based on the real-time data we've gathered with reports. We have use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading , and sharing dashboards, review these dashboard basics.



#### 4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/babls>

Team Member 1 - <https://trailblazer.me/id/kvengatachalam>

Team Member 2 - <https://trailblazer.me/id/rajvt10>

Team Member 3 - <https://trailblazer.me/id/akannan54>

#### 5 ADVANTAGES

- 1 .New experience
- 2 .Gain my knowledge
3. Quick service

#### DISADVANTAGE

1. It will be time consuming

2. Team coordination will it cause in convenient

## 6 APPLICATIONS

1. Condominiums and Properties
2. Common Expense Management
3. Property management applications will communicate with third party service using REST web services.
4. Create our own custom application using APEX , visual force and out of the box features of sales force.

## 7 CONCLUSION

1. The property management helps properties owner their property as well as tenants searching for property to rent or lease.
2. The company focuses management and financial management, tenant and occupancy, facility management and administration.
3. The company targets customers in these market segmentations because of their unique needs.
4. We also target customers according to the mentioned segmentations methods to remain competitive and differentiate our services from competitors.

## 8 FUTURE SCOPE

1. Property management firms offer extensive home listings from which we may select properties with desired features.
2. Property managers schedule visits to the shortlisted home as per our preferred timings.
3. We can award access through different methods and it could be future scope (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).