PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

REPORT

Trailhead link:

https://www.salesforce.com/trailblazer/kamurudeenj

Team members

Kamurudeen j

MADHAN.K

MANIKANDAN.S

KAVIYARASAN.S

What is Salesforce?

Salesforce is a cloud-based customer relationship management (CRM) platform and a suite of applications designed to help businesses manage their sales, customer service, marketing, and various other aspects of customer engagement. Salesforce provides tools and services for organizations to better understand and connect with their customers, streamline their operations, and make data-driven decisions.

Some key features and components of Salesforce include:

- Sales Cloud: Helps with sales and leads management.

- Service Cloud: Supports customer service and support.

- Marketing Cloud: Provides tools for marketing and automation.

- Commerce Cloud: Facilitates e-commerce and online shopping experiences.

- Community Cloud: Creates online communities for customers, partners, and employees.

- AppExchange: A marketplace for third-party applications and integrations.

- Einstein AI: Incorporates artificial intelligence for predictive analytics and insights.

Salesforce is widely used by businesses of all sizes to improve their customer relationships, manage sales processes, and enhance overall business operations.

OBJECT CREATION:

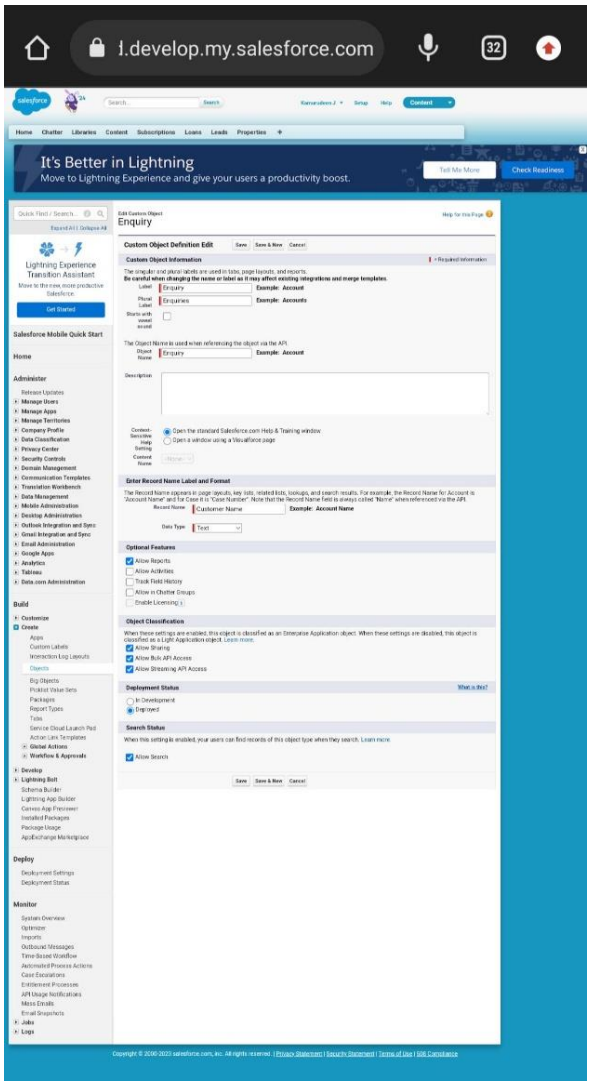
In Salesforce, object creation refers to the process of defining and setting up custom data structures that represent specific types of information or records that are relevant to your organization. These custom data structures are called custom objects.

Here's how you create custom objects in Salesforce:

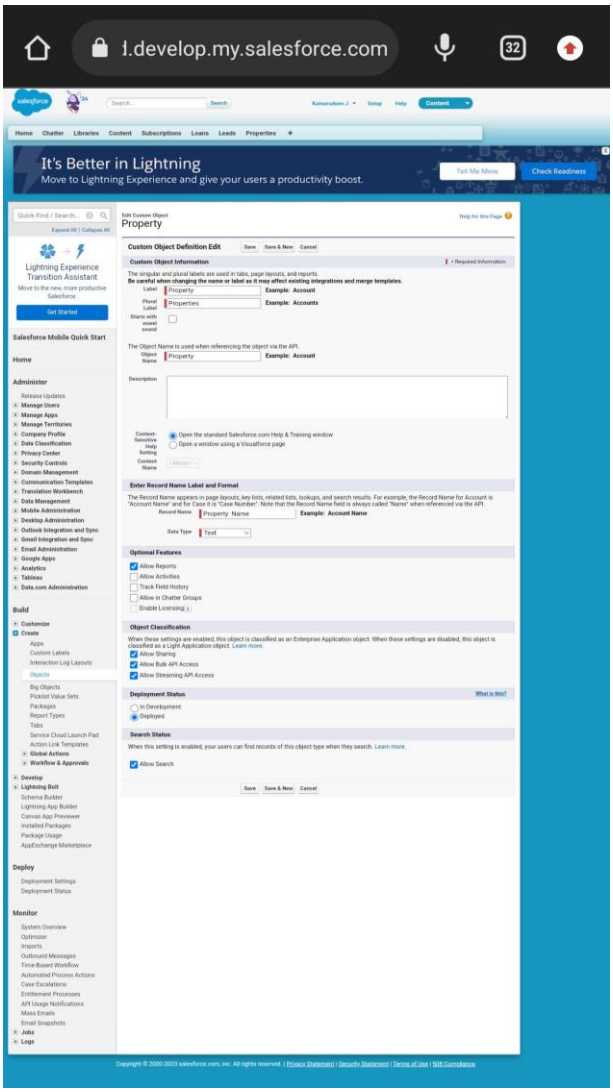
1. **Log in to Salesforce**: Access your Salesforce account with the necessary permissions.
2. **Access Setup**: Click on the "Setup" link in the top right corner of the Salesforce interface.
3. **Custom Objects**: In the Setup menu, find and select "Objects and Fields." Under this category, you'll find "Objects." Click on it.
4. **Create a New Custom Object**: Click on the "Create" button to start creating a new custom object.
5. **Define Object Properties**: You'll need to specify various properties for the custom object, including the object name, label, plural label, and record name settings. You can also define whether it should be a custom tab, among other options.
6. **Set Up Fields**: Define the fields (data fields) that the custom object will have. You can specify the data types, whether the field is required, and various other field properties.
7. **Page Layouts**: Create page layouts to define how the object's records are displayed in the user interface.
8. **Record Types**: If necessary, set up different record types for the custom object to handle various business processes or scenarios.
9. **Security Settings**: Configure object-level security settings to control who can access, create, and modify records of this object.

10. **Custom Tabs**: If you want to create custom tabs to display your custom object records, you can do so in the Tabs section.
11. **Save and Deploy**: After configuring all the necessary settings, save your custom object. Once saved, you can deploy it to make it available for use in your Salesforce organization.Custom objects in Salesforce are used to store and manage specific types of data that may not be adequately covered by standard Salesforce objects like Leads,Accounts, etc Opportunities.

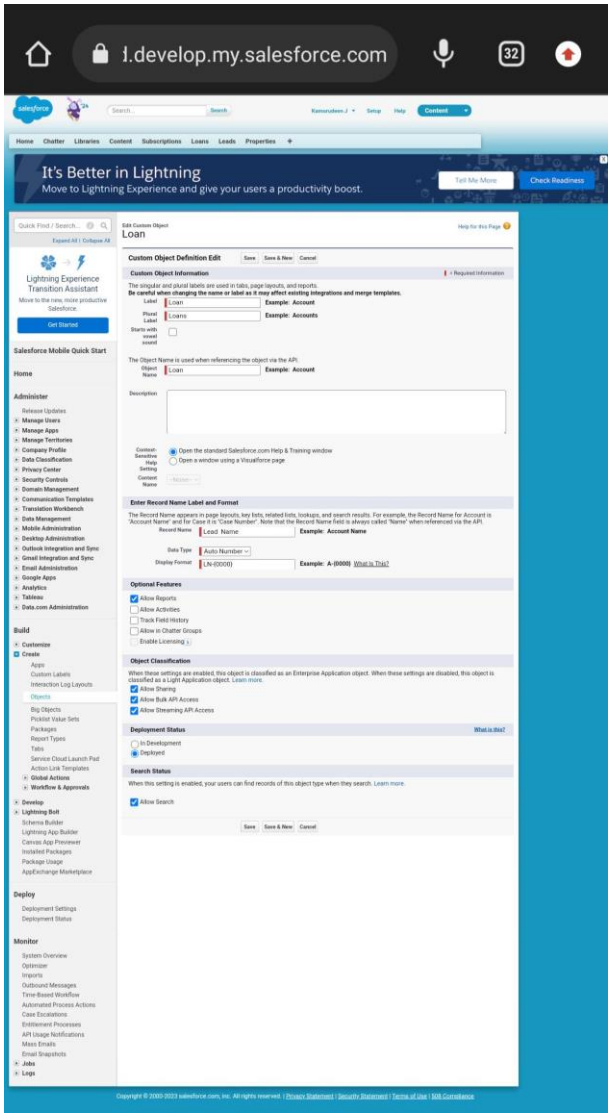
Enquiry object :



property object:



Loan object:


l.develop.my.salesforce.com
It's Better in Lightning
Move to Lightning Experience and give your users a productivity boost.
Tell Me More
Check Readiness
Loan
Custom Object Definition Edit
Custom Object Information
Enter Record Name Label and Format
Optional Features
Object Classification
Deployment Status
Search Status

TAB :

In Salesforce development, a “tab” refers to a user interface element that provides quick access to a specific type of record or custom object within the Salesforce application. Tabs are used to navigate and view data related to standard and custom objects. There are two main types of tabs in Salesforce:

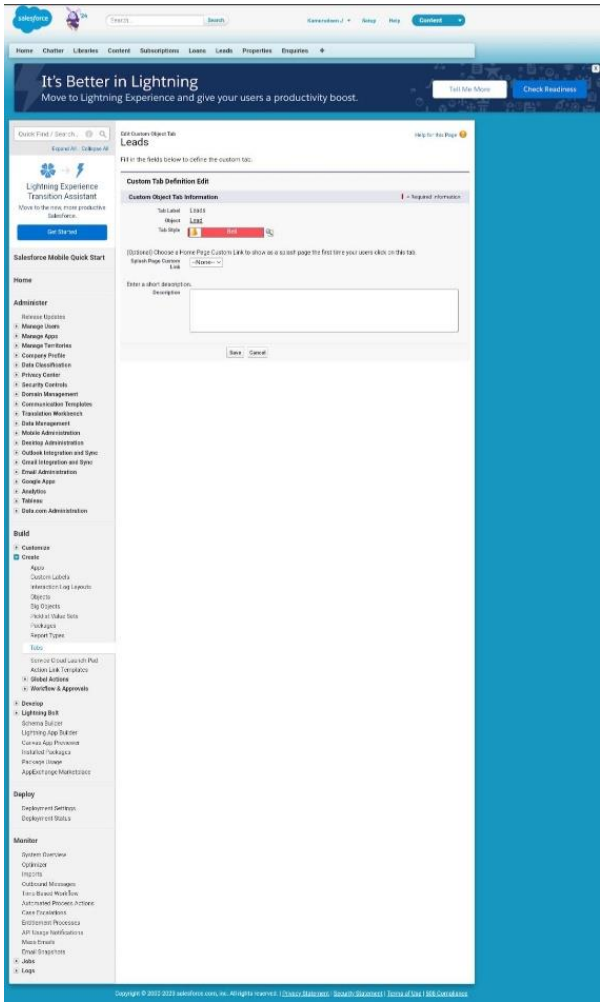
1. **Standard Tabs**: These are provided by Salesforce for standard objects like Leads, Accounts, Contacts, Opportunities, and other built-in objects. These tabs give users easy access to the standard object’s records and related data.

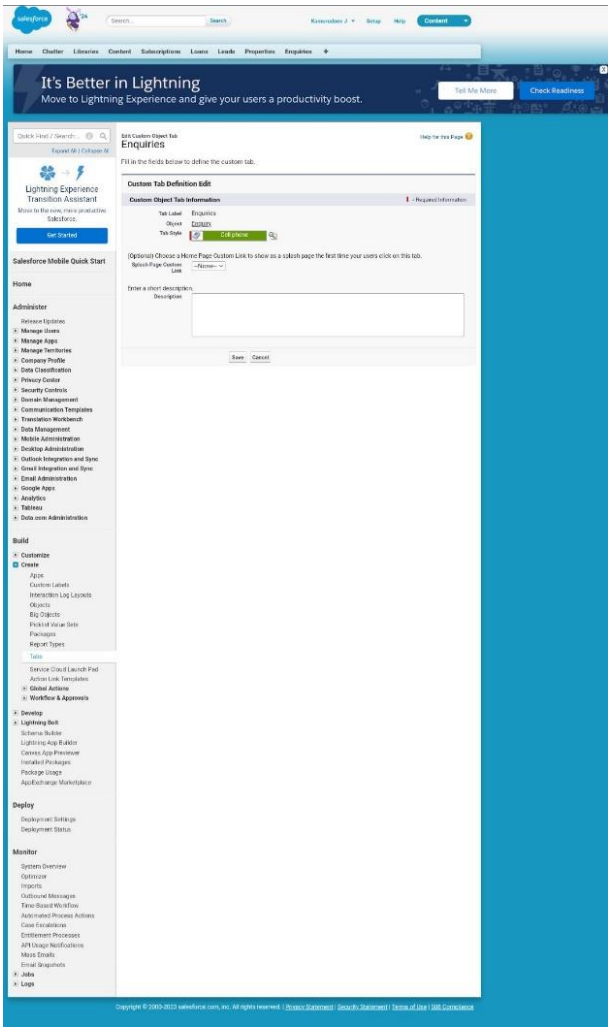
2. **Custom Tabs**: Custom tabs are used to provide access to custom objects that you’ve created in your Salesforce organization. When you create a custom object, you can also create a custom tab to display its records in the Salesforce user interface. Custom tabs allow you to extend Salesforce’s functionality to fit your specific business needs.

Custom tabs can be added to an app’s navigation bar, allowing users to access and interact with the custom object’s records. You can also customize the icon and label associated with the tab to make it easily recognizable to users.

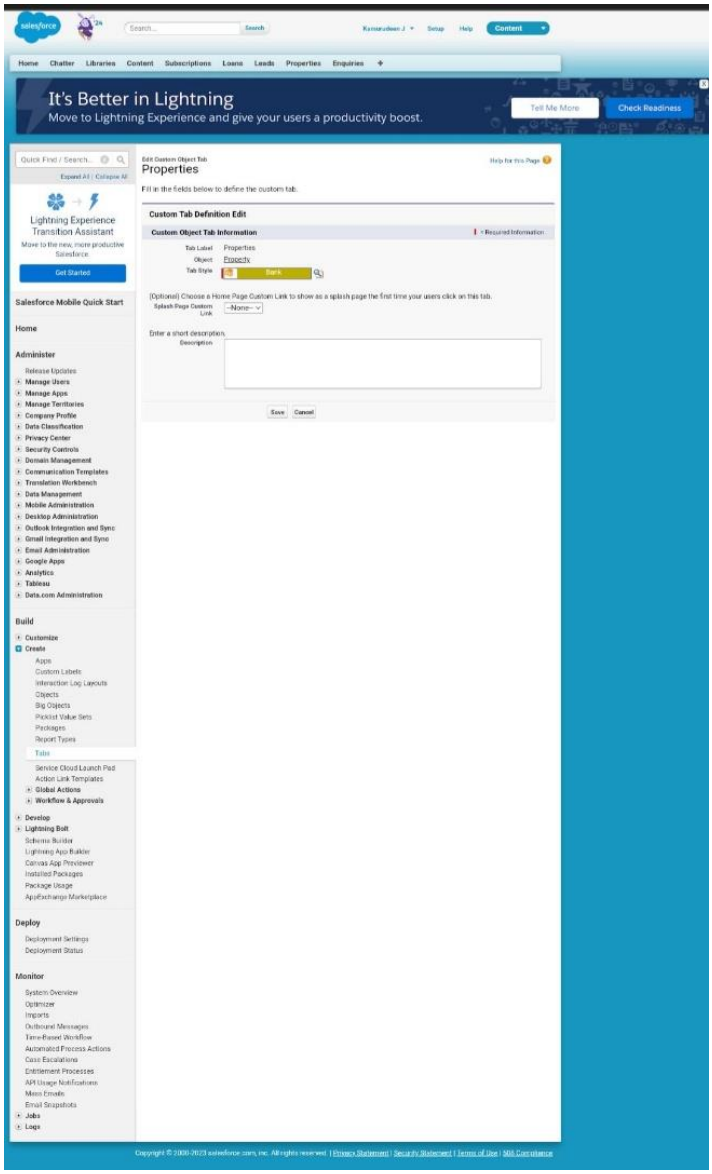
Tabs are essential for user-friendly navigation within Salesforce, as they make it convenient to access and work with various types of records and data. They are often used to provide a streamlined user experience, especially when dealing with custom objects or data specific to your organization’s operations.

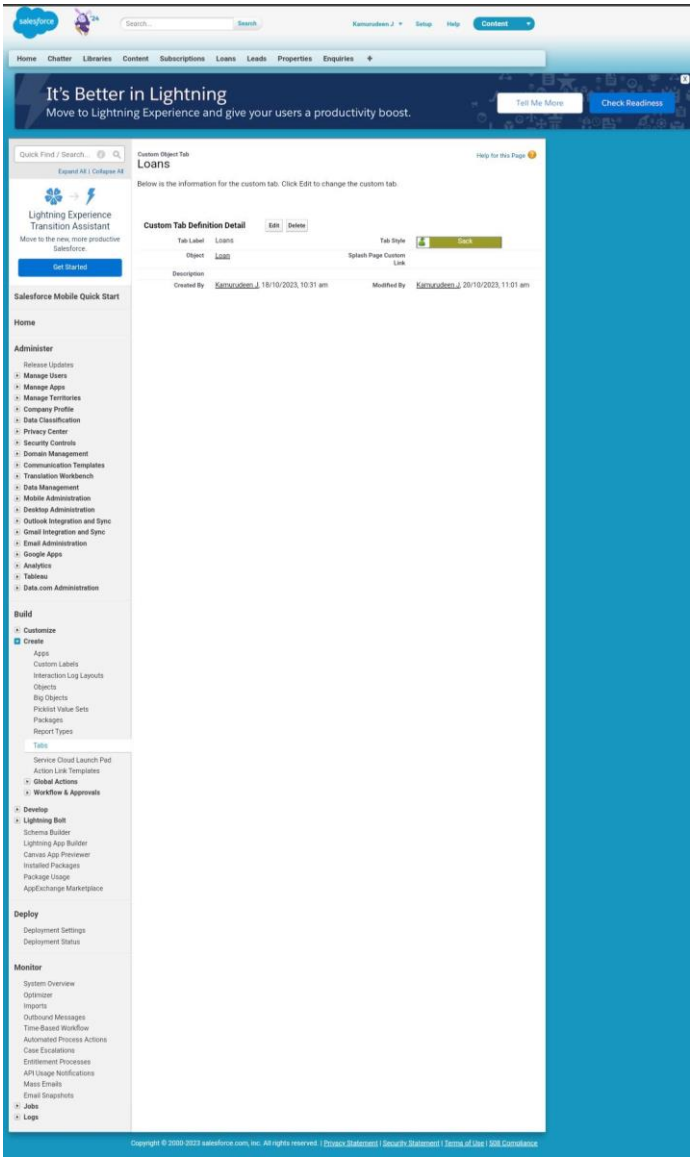
ENQUIRY AND LEAD OBJECT TAB :





PROPERTY AND LOAN OBJECT TAB:





THE LIGHTNING APP :

In Salesforce, a Lightning app refers to an application built using the Salesforce Lightning platform and framework. The Lightning platform is designed to create modern, responsive, and customizable user interfaces for Salesforce, making it easier for users to interact with their data and perform tasks.

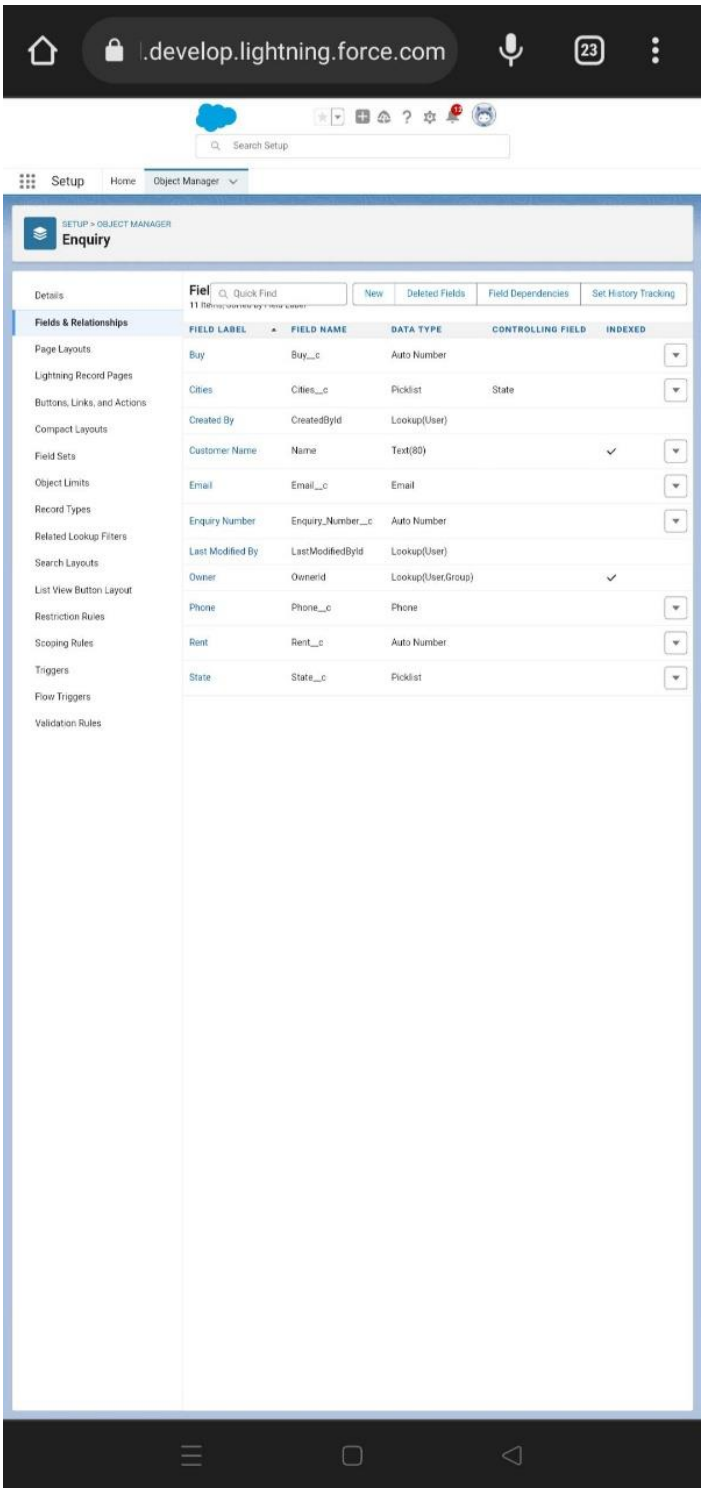
Here are key aspects of a Lightning app in Salesforce:

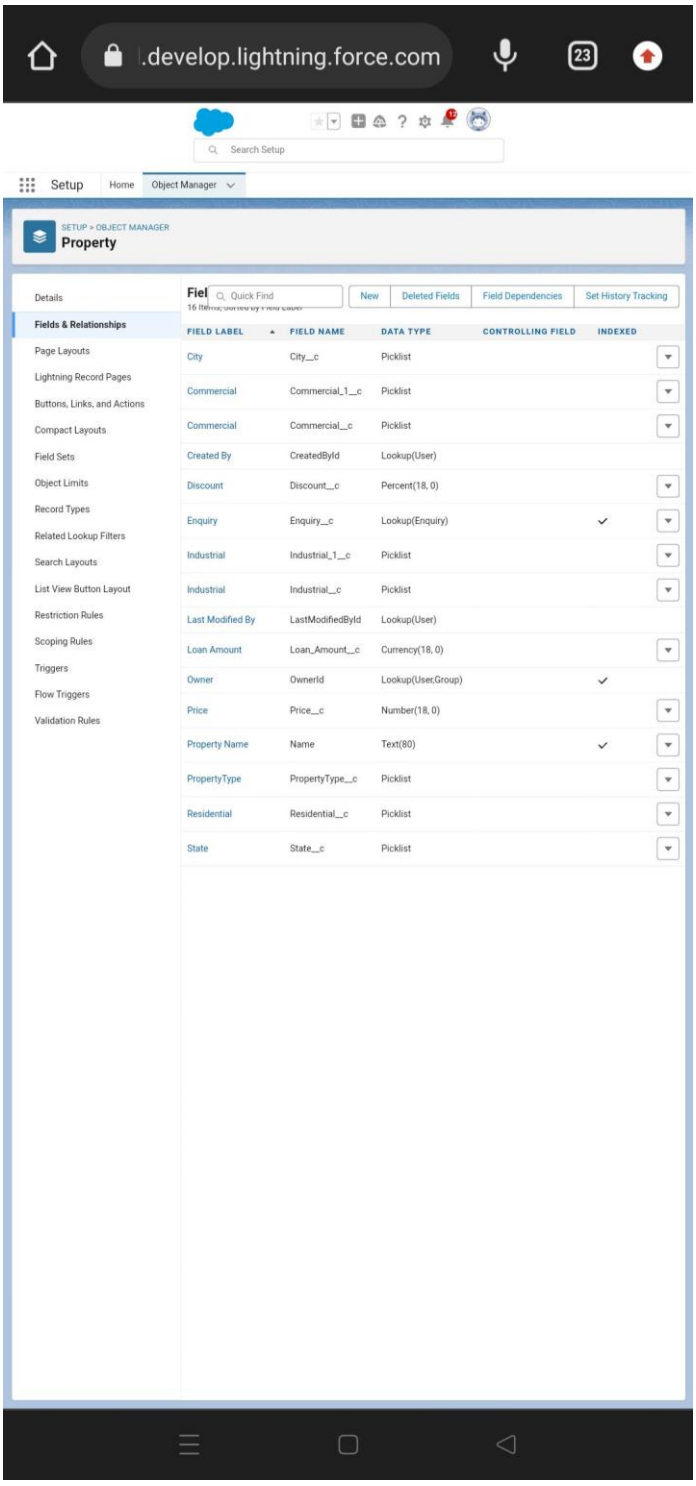
1. **User Interface**: Lightning apps provide a dynamic and intuitive user interface with a responsive design, which means it works well on various devices, including desktops and mobile devices. Users can work more efficiently and with a better user experience.
2. **Customization**: You can tailor a Lightning app to your organization's specific needs by adding various components, tabs, and features. This allows you to streamline and optimize the user interface for different user roles and functions within your organization.
3. **Components**: Lightning components are building blocks for creating Lightning apps. You can use pre-built components from Salesforce, create your own custom components, or install components from the Salesforce AppExchange to extend your app's functionality.
4. **Tabs**: Tabs in a Lightning app provide navigation and access to specific features and data. You can create custom tabs to display specific records, objects, or components. Lightning apps are organized around tabs, and you can customize the tabs to match your business processes.
5. **Automation**: You can leverage automation features like Process Builder and Lightning Flow to automate business processes within your Lightning app. This can help improve productivity and consistency.
6. **Integration**: Lightning apps can integrate with external systems and data sources using various tools and APIs, allowing you to bring data from different sources into your Salesforce environment.
7. **App Exchange**: You can extend the functionality of your Lightning app by installing third-party apps and components from the Salesforce AppExchange, which offers a wide range of solutions and integrations.

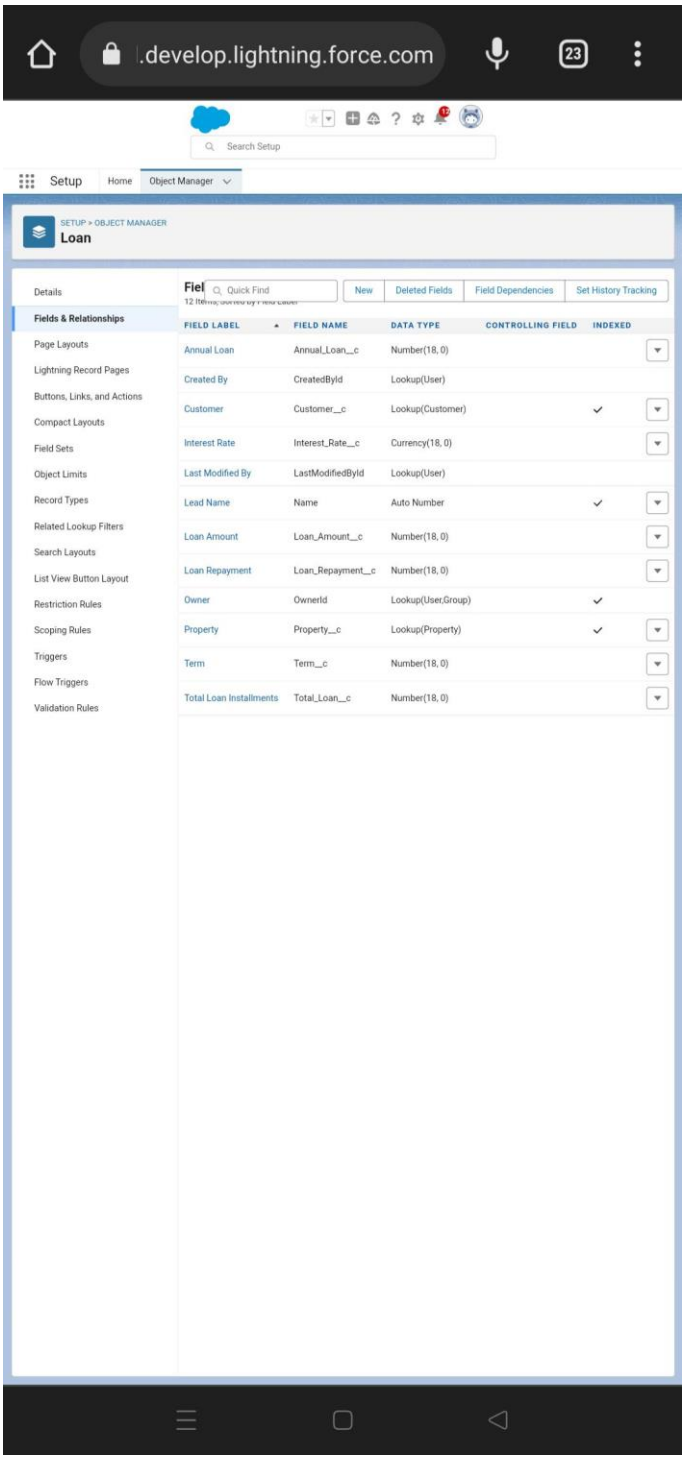
Fields :

In Salesforce, a “field” refers to a specific data element or attribute that represents a particular piece of information within a record. Fields are used to capture, store, and manage data associated with standard and custom objects in the Salesforce platform. Here are some key points about fields in Salesforce:

1. **Data Representation**: Fields are used to represent and store various types of data, such as text, numbers, dates, picklists, checkboxes, and more. Each field has a specific data type that defines the kind of data it can hold.
2. **Standard Fields**: Salesforce provides a set of standard fields for its standard objects (e.g., Account Name, Contact Email, Opportunity Amount). These fields are predefined and come with built-in functionality.
3. **Custom Fields**: Organizations can create custom fields to capture data specific to their business needs. Custom fields are typically associated with custom objects and can be customized in terms of data type, labels, help text, and other properties.
4. **Field Properties**: Each field can have various properties, such as field type, required status, unique constraints, default values, and formula expressions. These properties define how the field behaves and what data it can store.
5. **Validation Rules**: Fields can be used in validation rules to enforce data quality and consistency. For example, you can set up a validation rule to ensure that a phone number field contains a valid phone number format.
6. **Page Layouts**: Fields are added to page layouts to determine how they are displayed and arranged on the user interface for records. You can customize the arrangement of fields on page layouts to suit your organization’s needs.
7. **Search and Reporting**: Fields play a crucial role in searching for records and generating reports in Salesforce. You can filter, group, and aggregate data based on field values.
8. **Data Import and Export**: When importing or exporting data into/from Salesforce, you map fields to ensure that data is correctly placed in the appropriate fields.


.develop.lightning.force.com
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Enquiry
Details
Fields & Relationships
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
Validation Rules
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Buy
Buy__c
Auto Number
Cities
Cities__c
Picklist
State
Created By
CreatedById
Lookup(User)
Customer Name
Name
Text(80)
Email
Email__c
Email
Enquiry Number
Enquiry_Number__c
Auto Number
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Phone
Phone__c
Phone
Rent
Rent__c
Auto Number
State
State__c
Picklist


.develop.lightning.force.com
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Property
Details
Fields & Relationships
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
Validation Rules
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
City
City__c
Picklist
Commercial
Commercial_1__c
Picklist
Commercial
Commercial__c
Picklist
Created By
CreatedById
Lookup(User)
Discount
Discount__c
Percent(18, 0)
Enquiry
Enquiry__c
Lookup(Enquiry)
Industrial
Industrial_1__c
Picklist
Industrial
Industrial__c
Picklist
Last Modified By
LastModifiedById
Lookup(User)
Loan Amount
Loan_Amount__c
Currency(18, 0)
Owner
OwnerId
Lookup(User,Group)
Price
Price__c
Number(18, 0)
Property Name
Name
Text(80)
PropertyType
PropertyType__c
Picklist
Residential
Residential__c
Picklist
State
State__c
Picklist


.develop.lightning.force.com
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Loan
Details
Fields & Relationships
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
Validation Rules
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)
Customer
Customer__c
Lookup(Customer)
Interest Rate
Interest_Rate__c
Currency(18, 0)
Last Modified By
LastModifiedById
Lookup(User)
Lead Name
Name
Auto Number
Loan Amount
Loan_Amount__c
Number(18, 0)
Loan Repayment
Loan_Repayment__c
Number(18, 0)
Owner
OwnerId
Lookup(User,Group)
Property
Property__c
Lookup(Property)
Term
Term__c
Number(18, 0)
Total Loan Installments
Total_Loan__c
Number(18, 0)

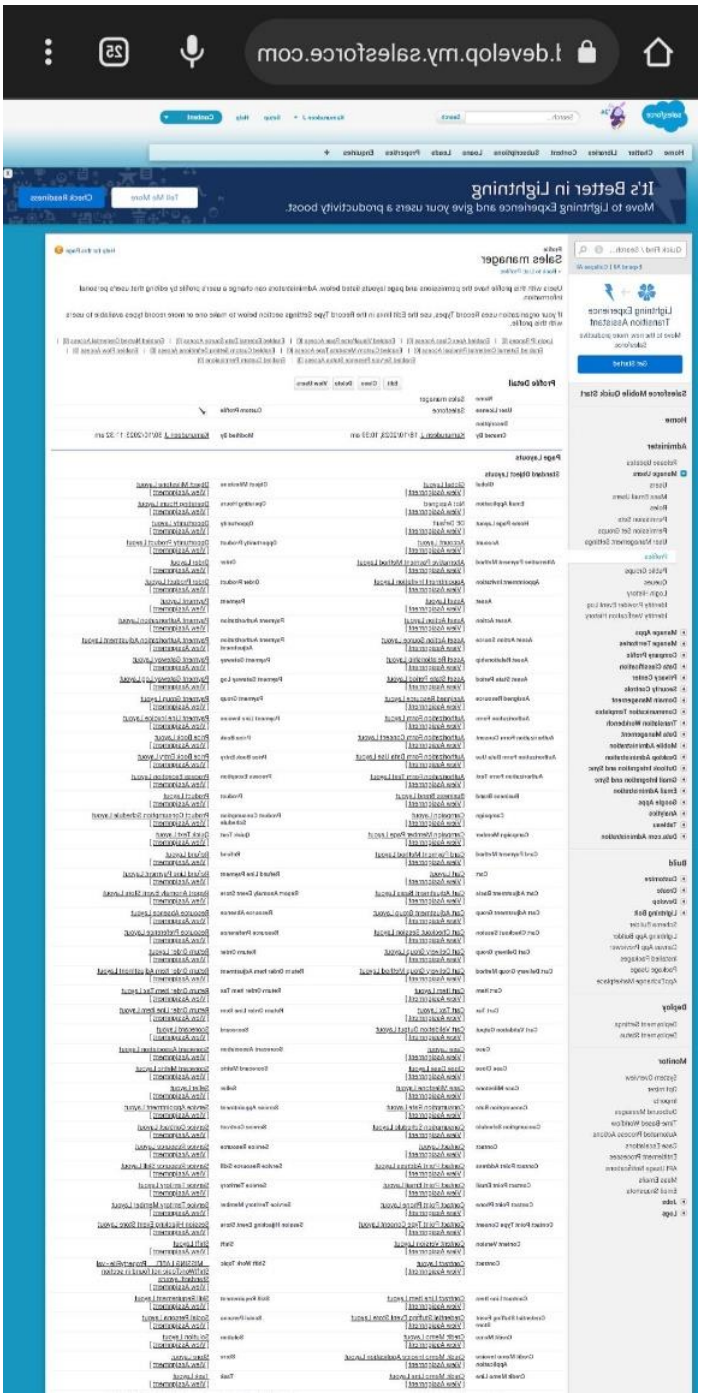
PROFILE:

- A profile is a group/collection of settings and permissions that define what a user can do in salesforce.
- Profile controls “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.
- You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

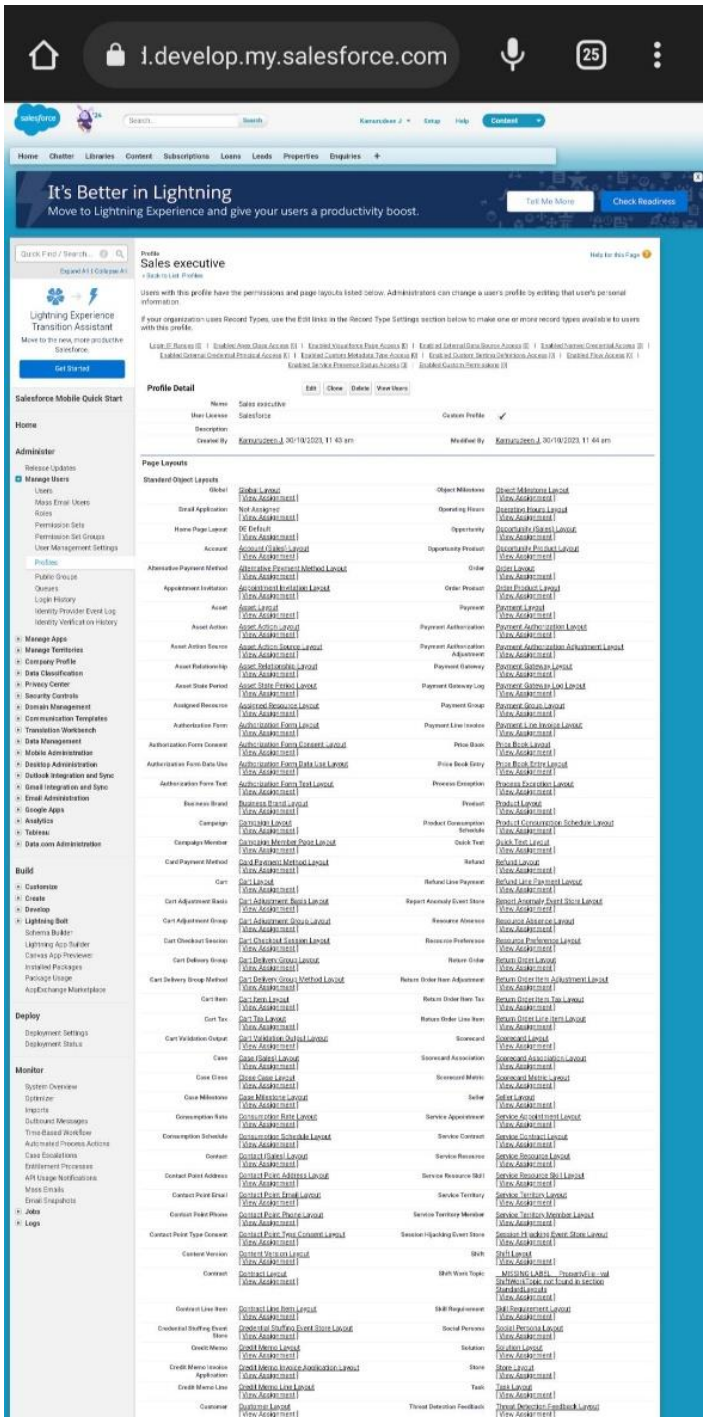
Types of profiles in salesforce
Standard profiles:

- By default salesforce provide below standard profiles.
- We cannot deleted standard ones
- .Each of these standard one includes a default set of permissions for all of the standard objects available on the platform.

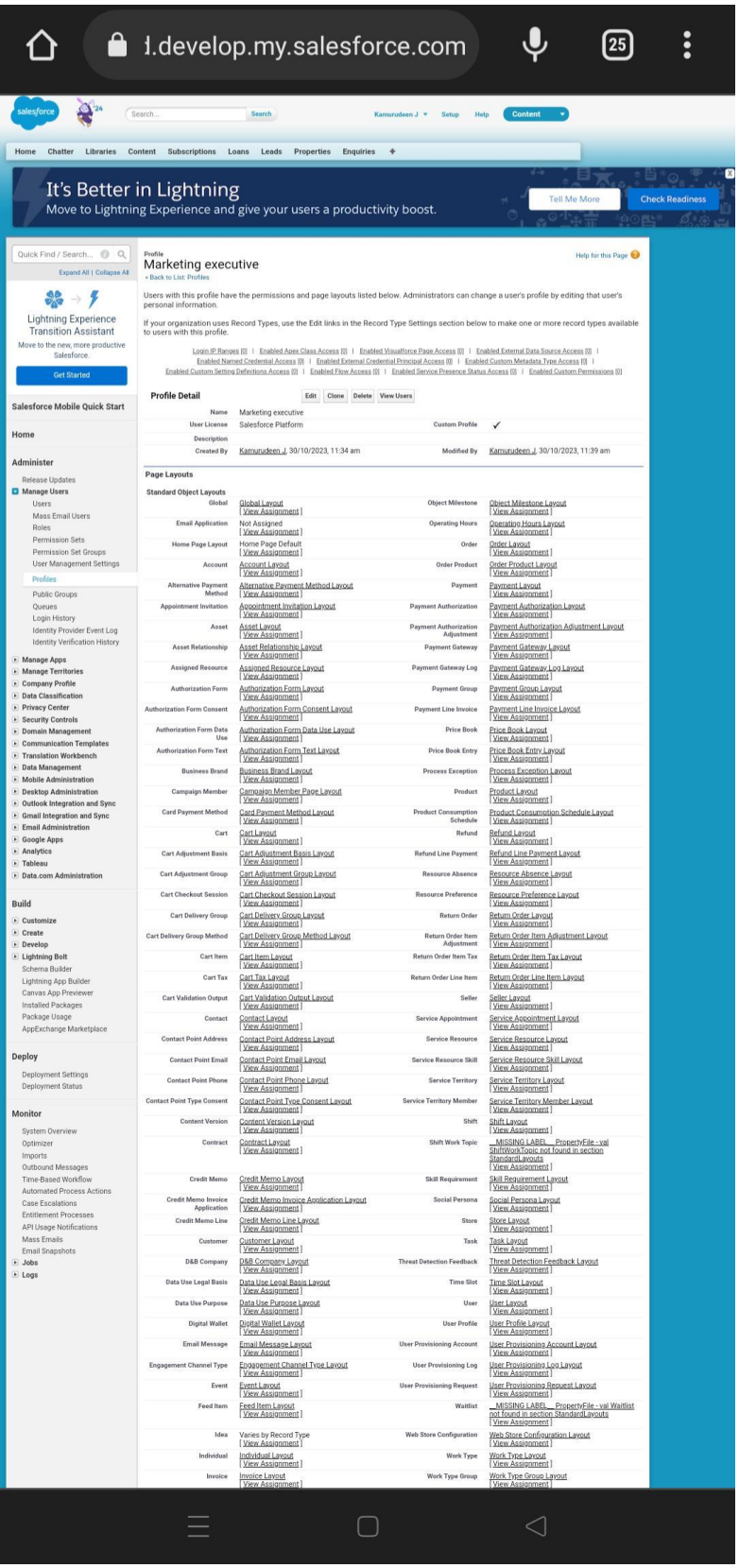
Custom Profiles: Custom ones defined by us.
They can be deleted if there are no users assigned with that particular one.



Sales manager profile.



Sales executive profile

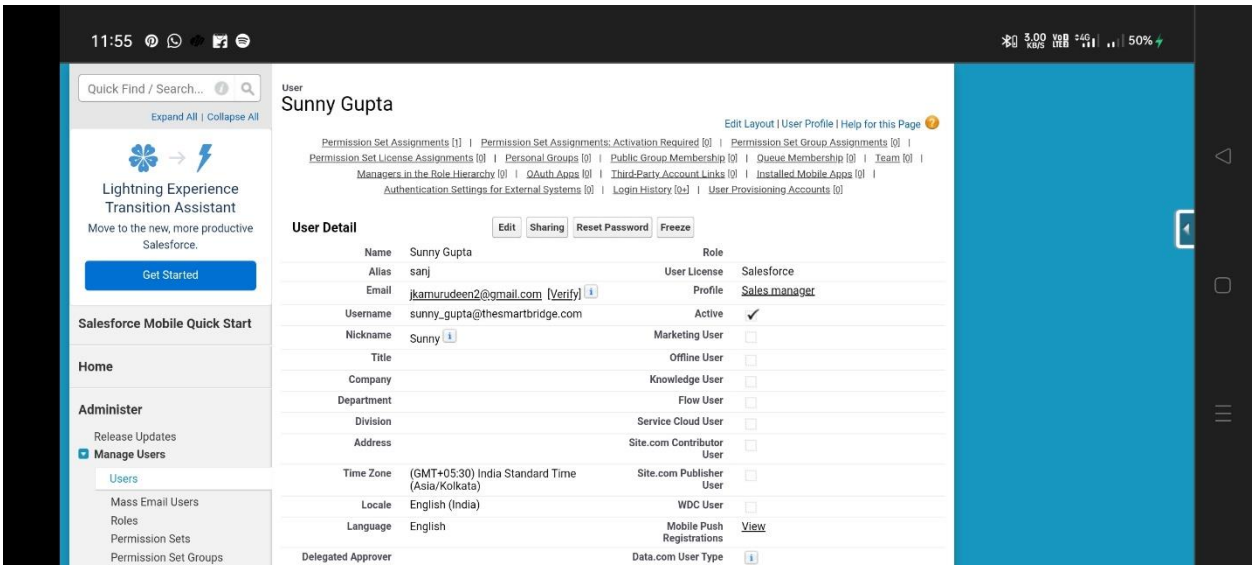


marketing executive profile.

Marketing manager profile

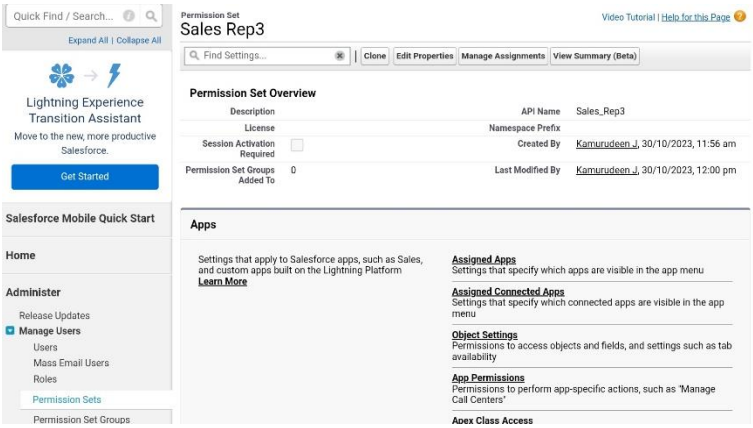
User :

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, 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.



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 problem statement in property management using Salesforce typically revolves around the challenges and pain points faced by property management companies or professionals in efficiently managing their properties and related tasks. Here's a general problem statement:

Problem Statement: Property management organizations are struggling to effectively oversee and maintain their property portfolios due to a lack of centralized data, manual processes, and limited visibility into property-related information. These issues lead to inefficiencies, increased operational costs, and a diminished ability to provide superior service to property owners and tenants.

More specific aspects of the problem might include:

1. **Data Fragmentation**: Property information is scattered across various spreadsheets, documents, and legacy systems, making it challenging to maintain a single source of truth for property details.

2. **Manual Processes**: Property management tasks, such as lease management, maintenance requests, and financial reporting, are often handled manually, leading to errors, delays, and increased administrative overhead.

3. **Limited Reporting**: Property managers lack real-time visibility into property performance and financial data, hindering data-driven decision-making and forecasting.

4. **Ineffective Tenant and Owner Communication**: Property managers struggle to efficiently communicate with tenants and property owners, leading to customer dissatisfaction and missed opportunities for upselling or cross-selling additional services.

5. **Maintenance Management**: Managing property maintenance and service requests is a complex and disorganized process, resulting in delayed responses and unresolved issues.

To address these challenges, the solution may involve implementing Salesforce for property management, where Salesforce's CRM and platform capabilities can be leveraged to centralize property data, automate processes, enhance communication, and provide real-time insights into property performance. This would streamline property management operations and improve overall efficiency and customer satisfaction.

Thanking you