

1 INTRODUCTION

1.1 Overview

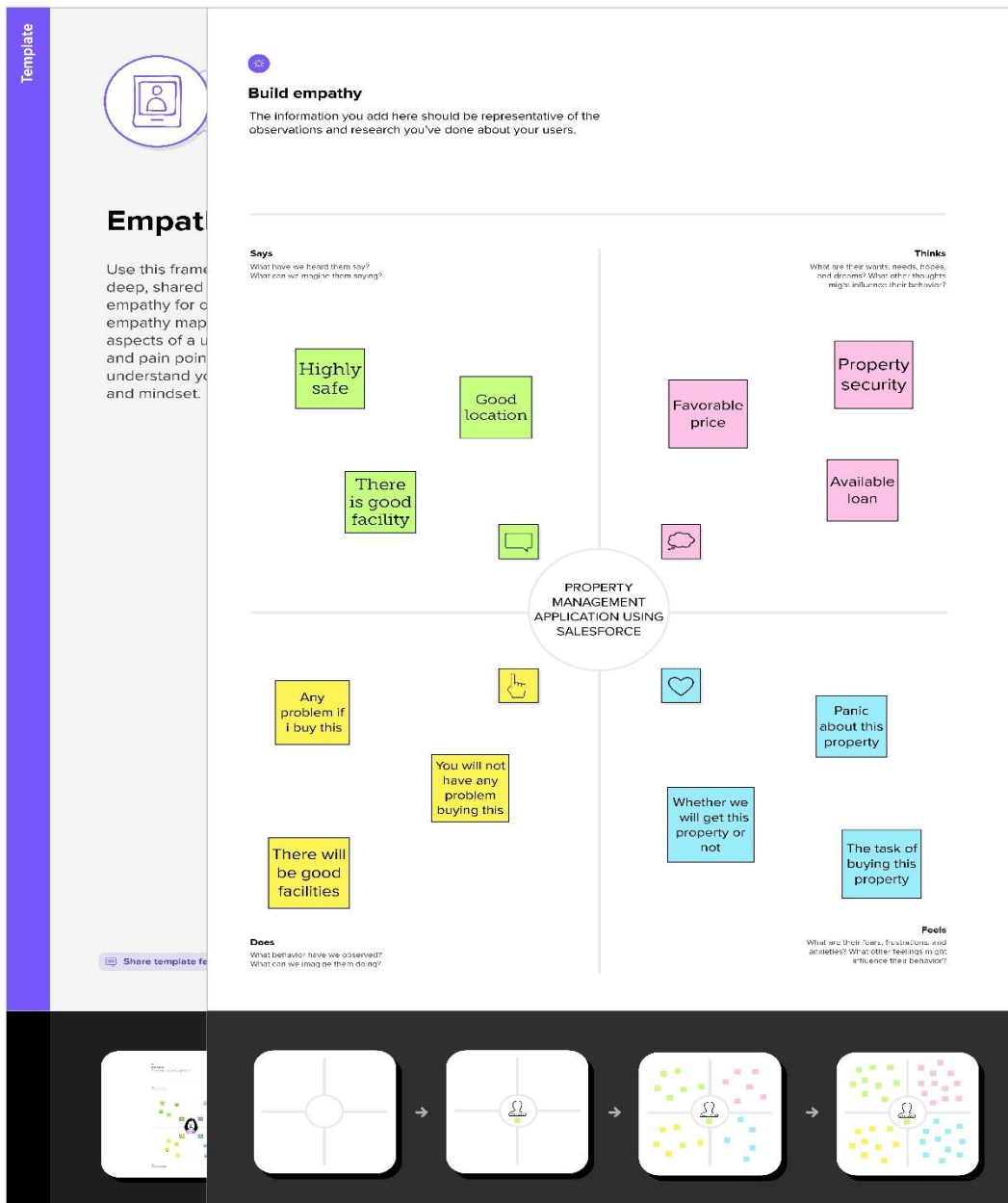
To develop an app for the property management where buyer can order his requirements and get the appropriate details of the property.

1.2 Purpose

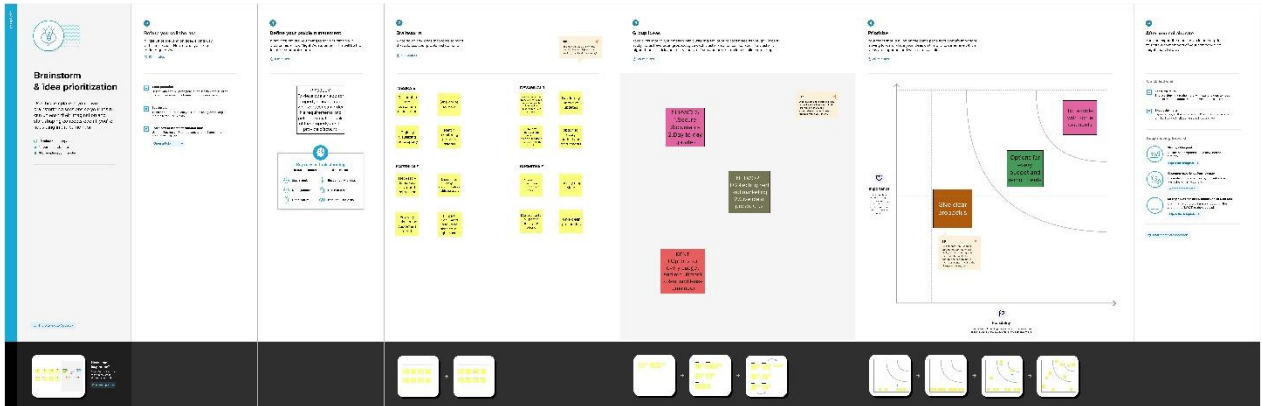
According to the interest of the customer to provide him with some discounts, if he is interested in taking loan so for to give the details how much loan the customer can get.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

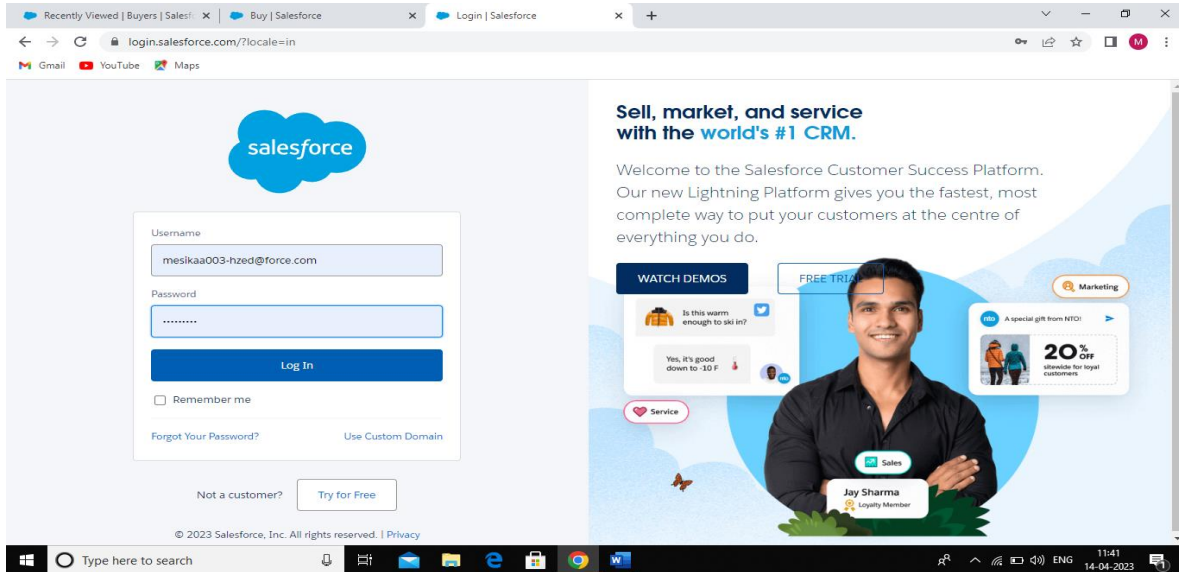
3.1 Data Model:

Object name	Fields in the Object		
Lead	Field name	Data type	
	Lead	Auto number	
	State	Picklist	
	City	Picklist	
	Email	Email	
	Phone	Phone	
Buy	Field name	Data type	
	Property Type	Picklist	
	Discount	Percentage	
	State	Picklist	
	City	Picklist	
	Annual Amount	Currency	
Rent	Field name	Data type	
	Rent	Auto number	
	Rental City	Text	
	BHK type	Picklist	
Loan	Field name	Data type	
	Loan Id	Auto number	
	Interest Rate	Currency	
	Term	Number	
	Annual Loan	Number	
	Total Loan Instalments	Number	
	Loan Repayments	Number	
	Loan Amoun	Formula	

3.2 Activity & Screenshot

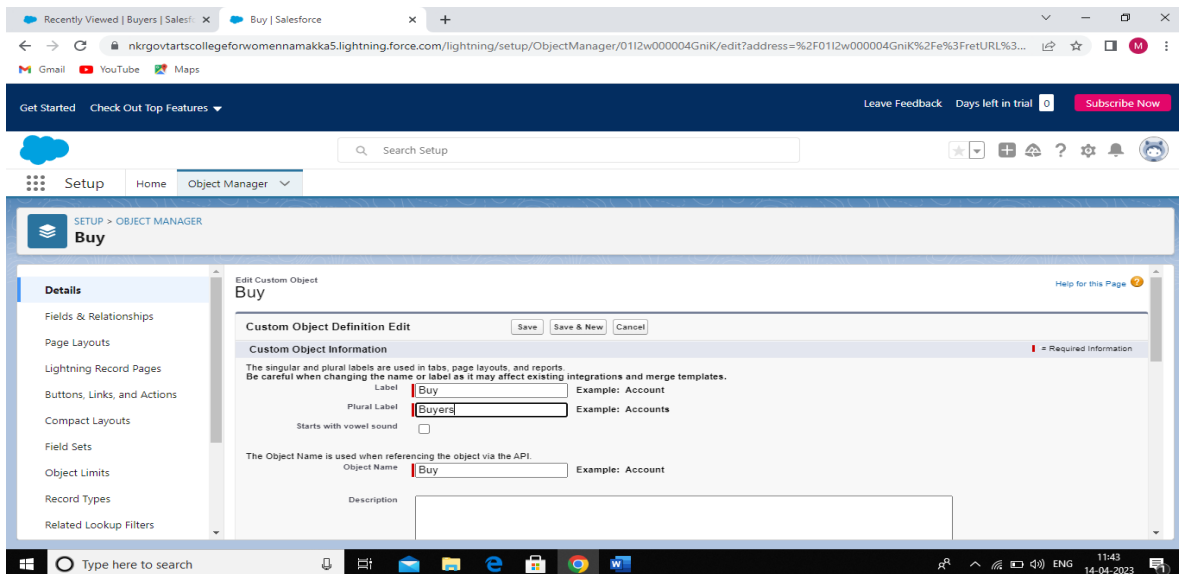
Screenshots:

Salesforce:



We created developer account in salesforce and login to the page to do our projects.

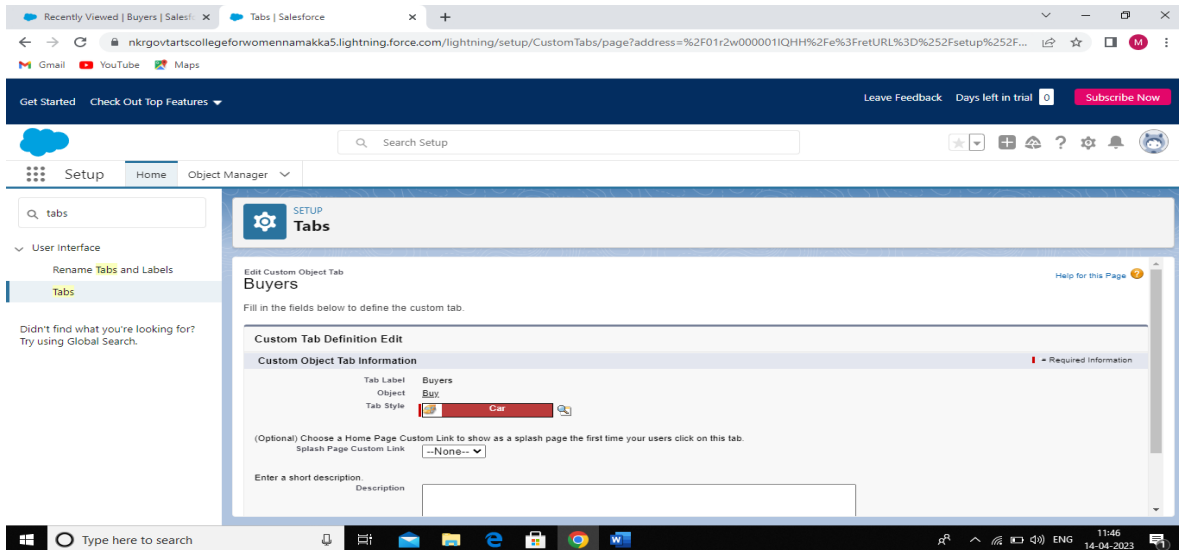
Objects:



In the object manager we created three custom objects:

- Buy
- Rent
- Loan

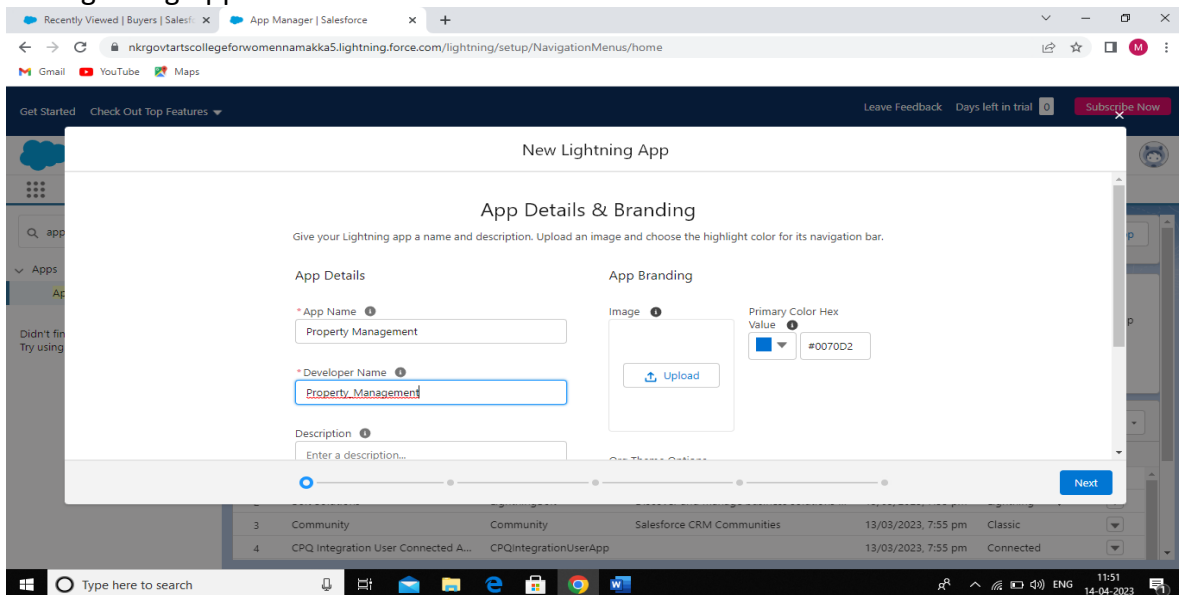
Tab:



We created four custom object tabs,

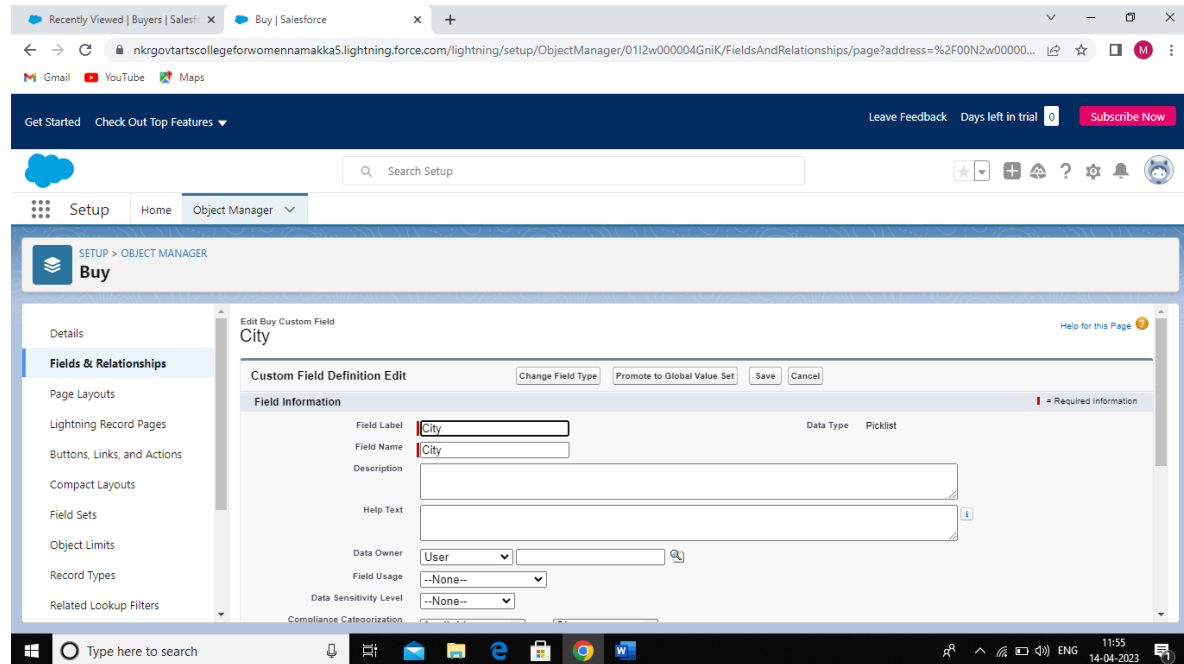
- Lead
- Buy
- Rent
- Loan

The Lightning App:



In the app manager we created new lightning app and named it “Property Management” and added navigation items (Lead, Buy, Rent, Loan) and added User profile (System Administrator, Salesforce Platform user, Standard user).

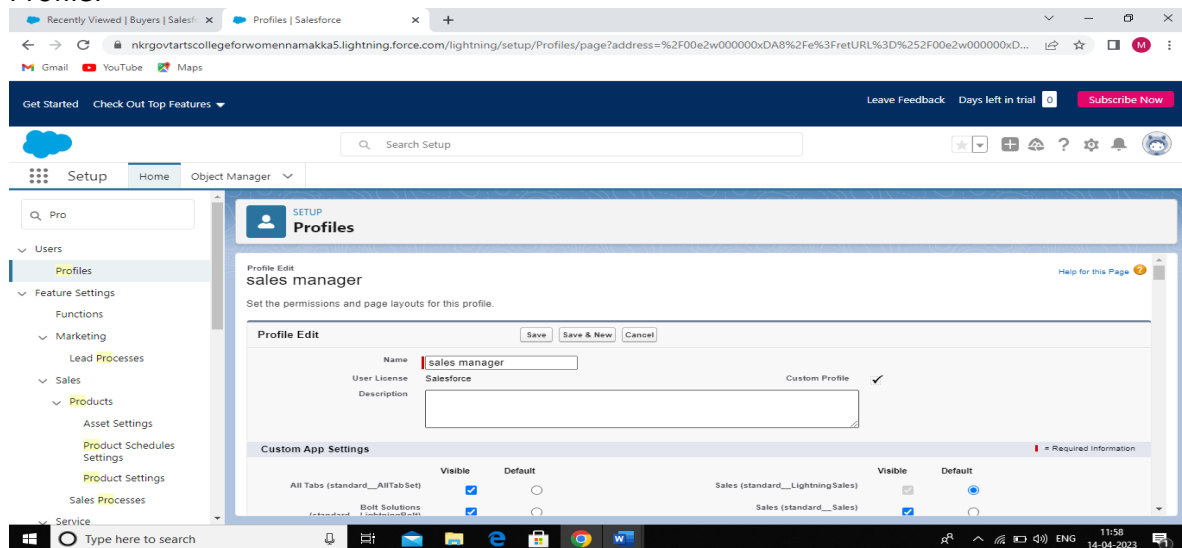
Field:



We created field and relationship for each object we customize

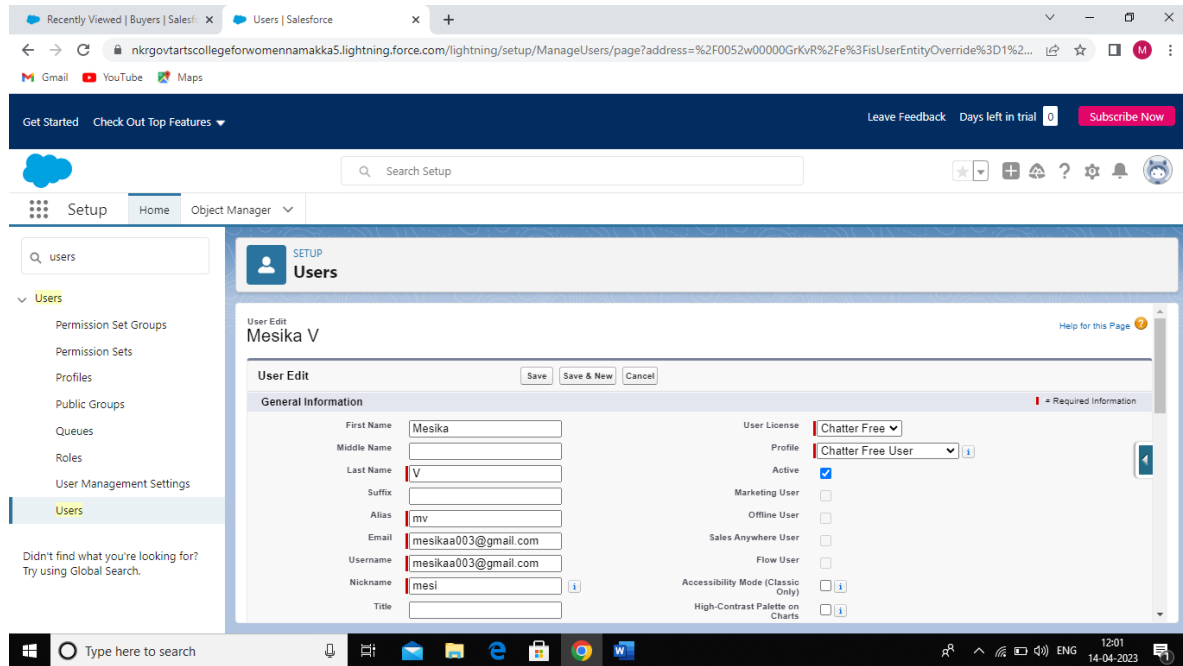
- Lead (State, City, Email, Phone)
- Buy (Property type, Discount, State, City, Annual amount)
- Rent (Rent, Rental city, BHK type)
- Loan (Loan Id, Interest Rate, Term, Annual Loan, Total LoanInstalments, Loan Repayment, Loan amount)

Profile:



We created new profile for Sales Manager, Sales Rep, Marketing Executives and Marketing Manager.

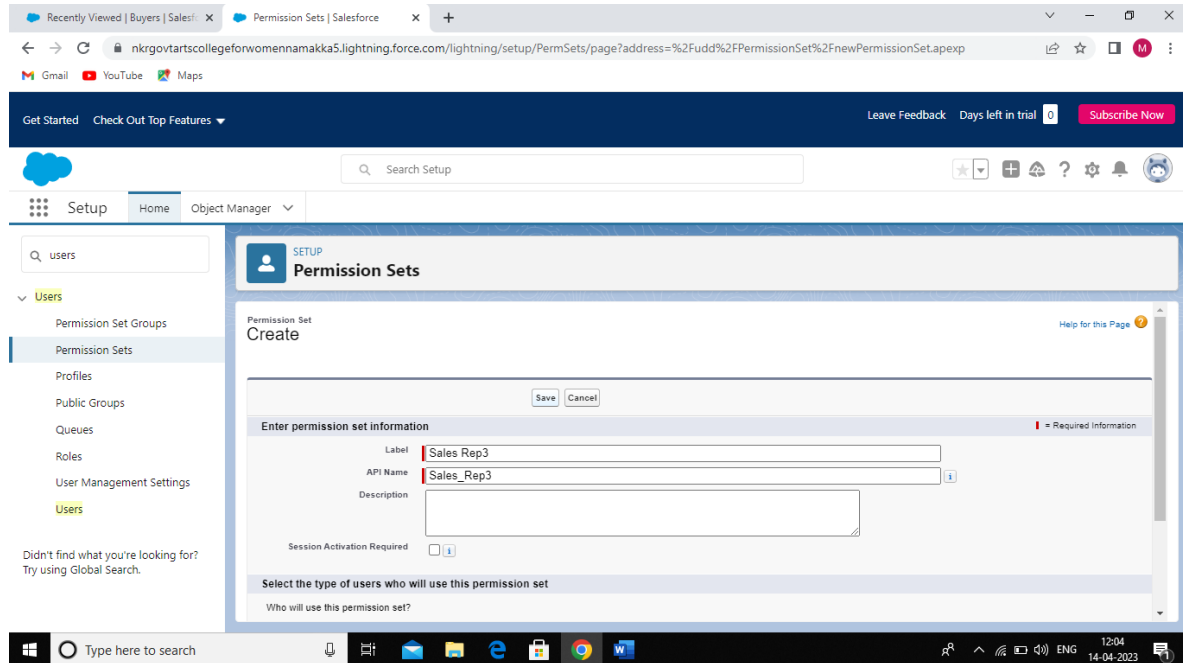
New User:



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a search bar and a list of setup categories: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' category is selected. The main content area is titled 'Users' and shows the 'User Edit' form for a user named 'Mesika V'. The form includes fields for First Name, Middle Name, Last Name, Suffix, Alias, Email, Username, Nickname, and Title. The 'User License' is set to 'Chatter Free' and the 'Profile' is set to 'Chatter Free User'. The 'Active' checkbox is checked. The 'Marketing User', 'Offline User', 'Sales Anywhere User', and 'Flow User' checkboxes are unchecked. The 'Accessibility Mode (Classic Only)' and 'High-Contrast Palette on Charts' checkboxes are also unchecked. The 'Save' button is visible at the top of the form.

We created a user Sales Rep3-Mesika

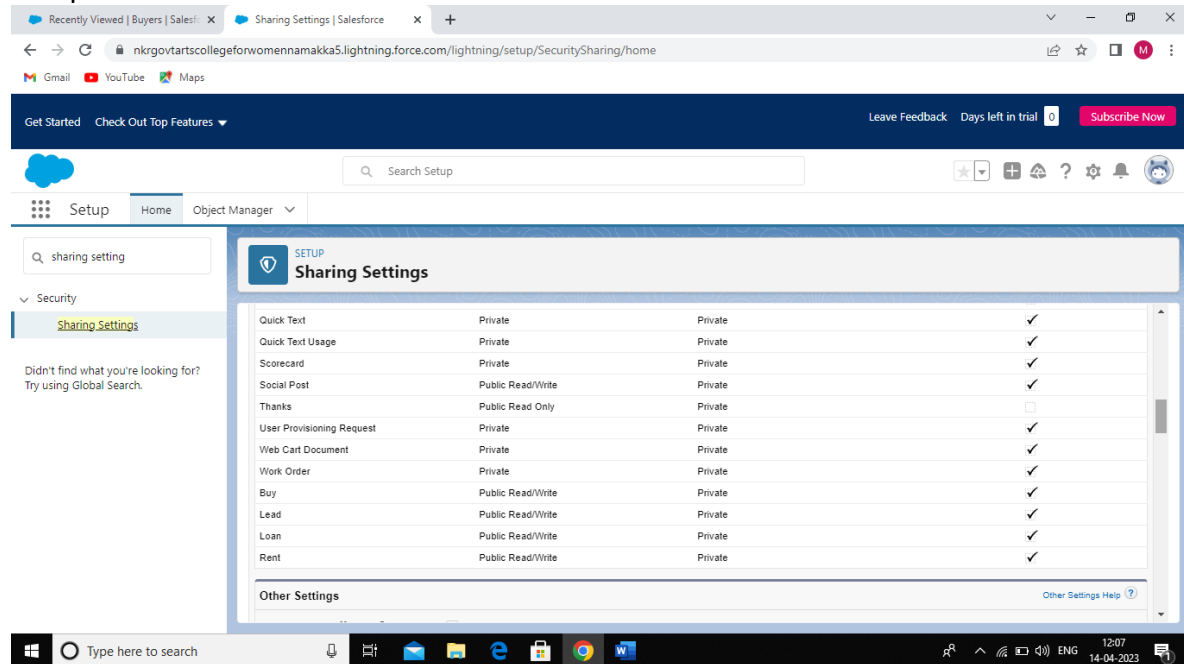
Permission Set:



The screenshot shows the Salesforce Setup interface for managing permission sets. The left sidebar contains a search bar and a list of setup categories: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Permission Sets' category is selected. The main content area is titled 'Permission Sets' and shows the 'Create' form for a new permission set. The form includes fields for Label, API Name, and Description. The 'Label' field is set to 'Sales Rep3' and the 'API Name' field is set to 'Sales_Rep3'. The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. The 'Select the type of users who will use this permission set' section is visible at the bottom of the form.

We added the access for Sales Rep3 and give access with create permission for the user.

Setup For OWD:



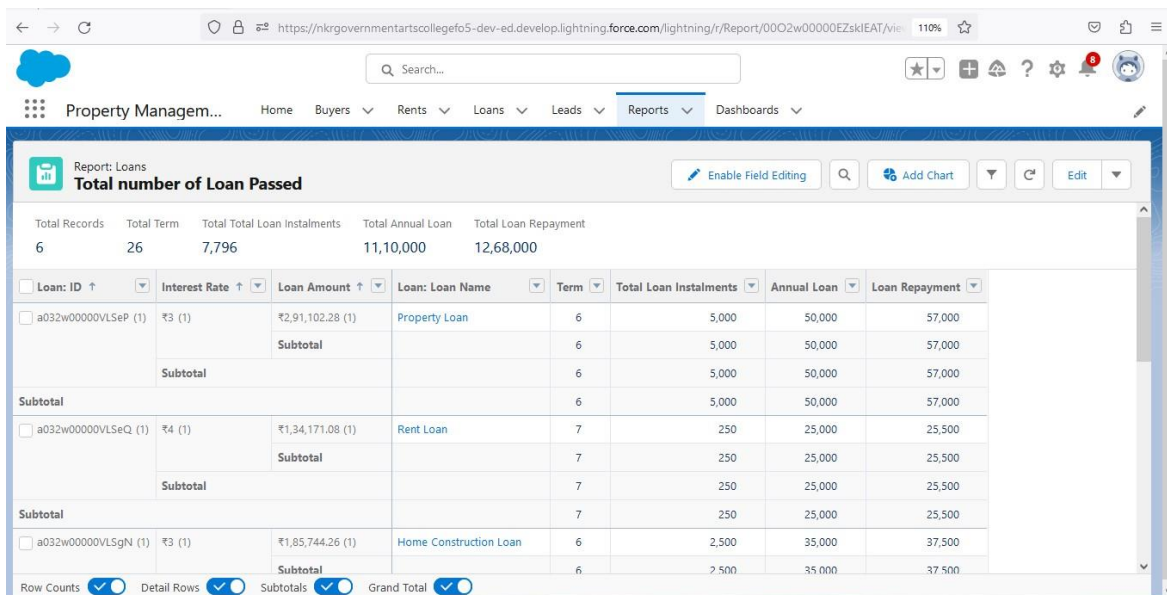
The screenshot shows the Salesforce Setup - Sharing Settings page. The left sidebar contains a search bar with 'sharing setting' and a list of security-related settings. The main content area displays a table of sharing settings for various objects.

Object	Internal Access	External Access	Default
Quick Text	Private	Private	✓
Quick Text Usage	Private	Private	✓
Scorecard	Private	Private	✓
Social Post	Public Read/Write	Private	✓
Thanks	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Buy	Public Read/Write	Private	✓
Lead	Public Read/Write	Private	✓
Loan	Public Read/Write	Private	✓
Rent	Public Read/Write	Private	✓

Other Settings: [Other Settings Help](#)

We disabled automatic access using your hierarchies, deselected grant access using hierarchies for Lead, Rent custom object and made the default internal and external access as private.

Report:



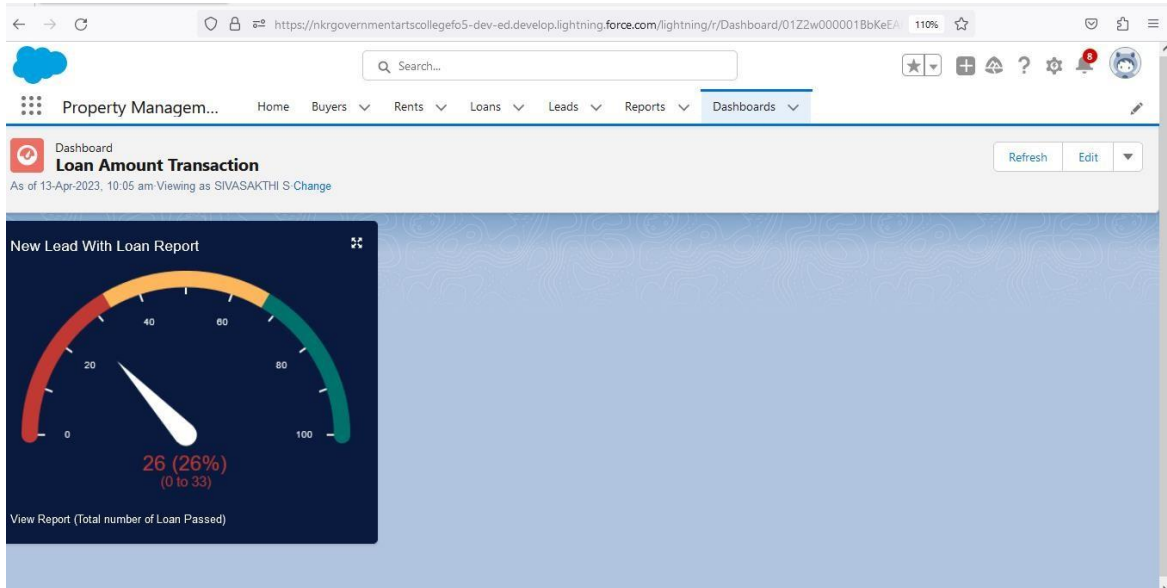
The screenshot shows a Salesforce report titled 'Report: Loans' with the subtitle 'Total number of Loan Passed'. The report displays summary statistics and a detailed table of loan data.

Loan: ID	Interest Rate	Loan Amount	Loan: Loan Name	Term	Total Loan Instalments	Annual Loan	Loan Repayment
a032w00000VLSeP (1)	₹3 (1)	₹2,91,102.28 (1)	Property Loan	6	5,000	50,000	57,000
Subtotal				6	5,000	50,000	57,000
Subtotal				6	5,000	50,000	57,000
a032w00000VLSeQ (1)	₹4 (1)	₹1,34,171.08 (1)	Rent Loan	7	250	25,000	25,500
Subtotal				7	250	25,000	25,500
Subtotal				7	250	25,000	25,500
a032w00000VLSgN (1)	₹3 (1)	₹1,85,744.26 (1)	Home Construction Loan	6	2,500	35,000	37,500
Subtotal				6	2,500	35,000	37,500

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

We created the report of the Total Number of Loan Passed for getting the amount for the property.

Dashboards:



We created the dashboard for Loan Amount Transaction.

- 4 Trailhead Profile Public URL**
- Team Lead –**
<https://trailblazer.me/id/mesiv>
- Team Member 1 –**
<https://trailblazer.me/id/rdevamugi>
- Team Member 2 –**
<https://trailblazer.me/id/ukarthikas>
- Team Member 3 –**
<https://trailblazer.me/id/susms7>

Project Report Template

5 **ADVANTAGES**

- Our Application will show all the needed information and categories the information depending on the customer's need.
- The system which helps customer to save time and money.

6 **DISADVANTAGE**

- Time –Consuming if you choose the wrong statement.
- Might seem expensive for a small business

7 **APPLICATIONS**

- This system gives the complete package of details about the properties to the customer.
- The system which helps customer buy and to maintain customer properties securely.
- The property management helps the customer to get loan facilities easily.

8 **CONCLUSION**

- In this Project we have created a CRM for property management under salesforce platform. First we create the four objects Buy, Rent, Loan and Lead under the objects we create the fields, Enter the required data and finally derive the reports and dashboards of the Project.

9 **FUTURE SCOPE**

- The future Scope of the project would save the time for applicants and providing more options for every Budget and Requirements.