Project Name:

Property Management Application Using Salesforce - (Developer) - (Short-Term)

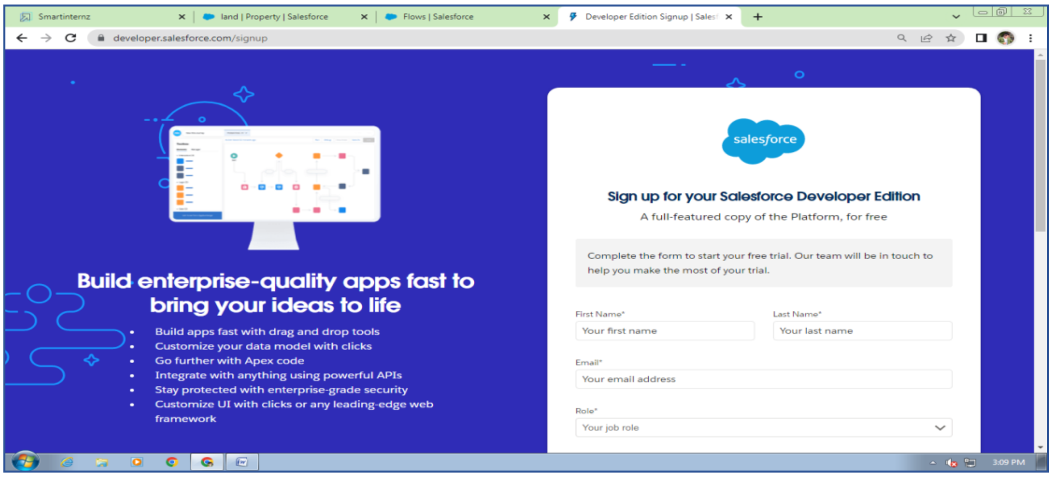
INTRODUCTION:

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. 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.

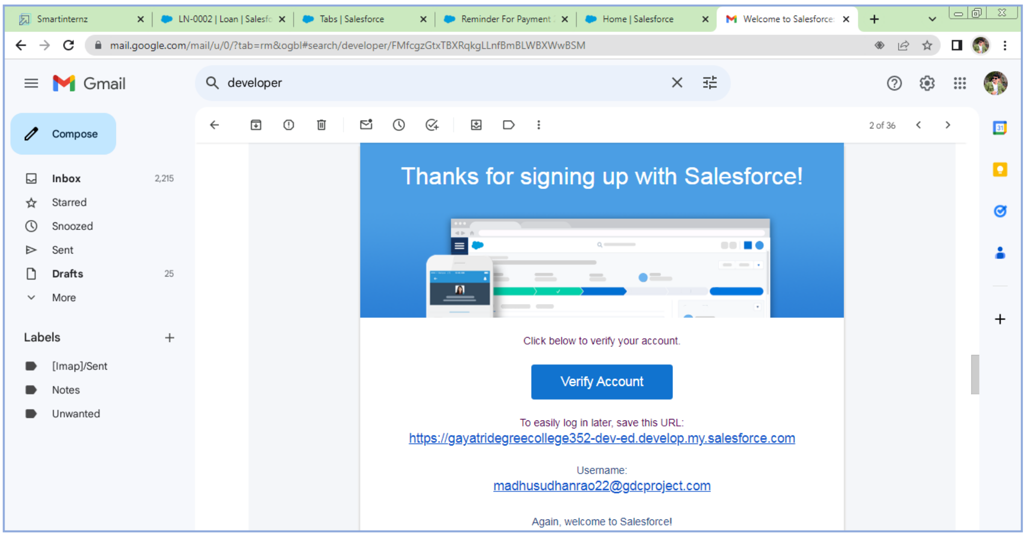
Milestone – 01: Salesforce

Creating Developer Account:

1. Creating Developer Account
2. Creating a developer org in salesforce.
3. Go to developers.salesforce.com/Click on sign up.
4. On the sign up form, enter the following details :
5. **First name & Last name :** GUNTI JAYA SURYA
6. **Email :** guntijayasuryajaya2003@gmail.com
7. **Role :** Developer
8. **Company :** GAYATRI DEGREE COLLEGE - TIRUPATI
9. **County :** India
10. **Postal Code :** 517501
11. **Username :** jayasurya@gdcproject.com
12. Click on sign up after filling these.



Account Activation:



MILESTONE-2: Objects

Create Object Enquiry :

1)To create an object:

2)From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.

3)Enter the label name? Enquiry

4)Plural label name? Enquirys

5)Record Name? Enquiry Name

6)click on Allow reports,

7)Allow search ? Save

Create Object Property:

1)To create an object:

2)From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.

3)Enter the label name?Property

4)Plural label name? Properties

5)Record Name?Property Name

6)click on Allow reports,

7)Allow search ? Save

Create Object Loan:

1.To create an object:

2.From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.

3.Enter the label name?Loan

4.plural label name? Loans

5.Record Name?Loan Id

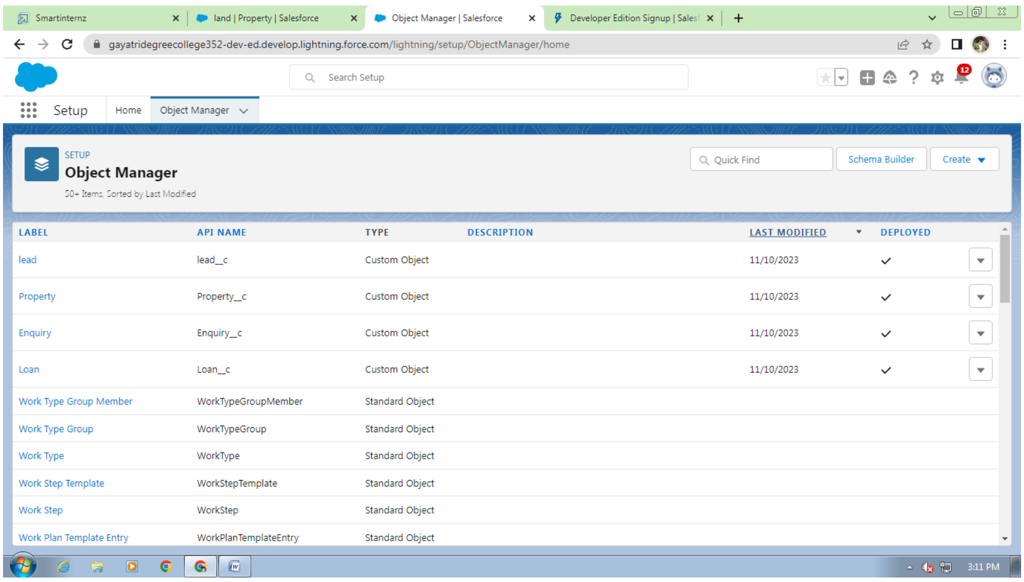
6.Data Type?Auto Number

7.Display Formate?LN-{0000}

8.Starting Number?0001

9.click on Allow reports,

10.Allow search?Save



MILESTONE - 3: Tab

Create The Lightning Tab

Create the Lightning Tab to create a Tab:(enquiries)

Go to setup page ? type Tabs in Quick find bar ? click on tabs ? New (under custom object tab)

Select Object(Lead) ? Select the tab style ? Next (Add to profiles page) keep it as default ? Next (Add to Custom App) keep it as default ? Save.

Create A Tab (Property,Loan)

To create a Tab:(Property)

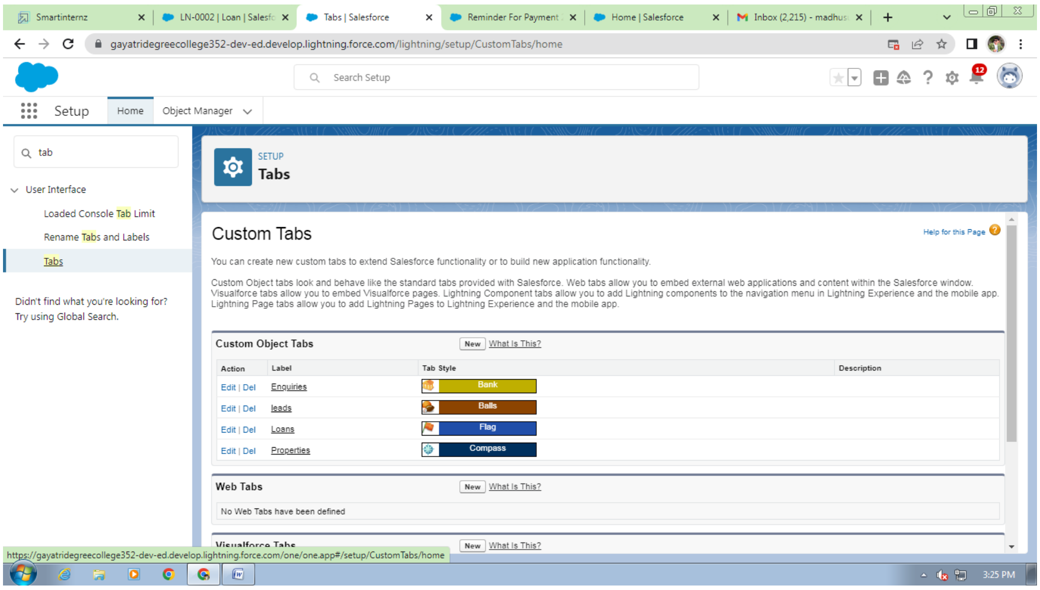
1)Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)

2)Select Object(Property) ? Select the tab style ? Next (Add to profiles page) keep it asdefault ? Next (Add to Custom App) keep it as default ? Save.Activity4:

To create a Tab:(Loan)

1)Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)

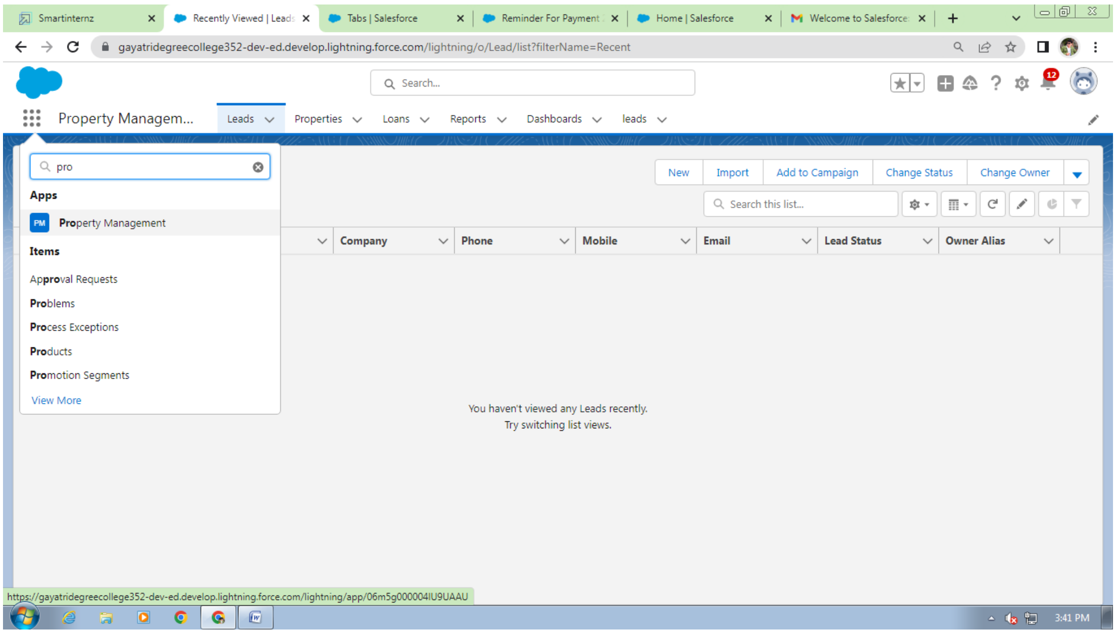
2)Select Object(Buy) ? Select the tab style ? Next (Add to profiles page) keep it as default ? Next (Add to Custom App) keep it as default ? Save



MILESTONE- 4:The Lightning App

Create The Lightning App:

1. Go to setup page ? search “app manager” in quick find ? select “app manager” ? click on New lightning App.
2. Fill the app name as an Property Management in app details and branding ?Next ? (App option page) keep it as default ? Next
3. (Utility Items) keep it as default ? Next ? (Add User Profile) Add System Administrator, Salesforce platform user, Standard User ? Next.
4. To Add Navigation Items:
   (Lead, Property, Loan, Report, Dashboard) Select the items from the search bar and move it using the arrow button ? Next.
5. To Add User Profiles:
   (System Administrator, Salesforce platform user, Standard User)Search profiles in search bar ? click on the arrow button ? save & finish.



MILESTONE – 5: Fields

Create Fields:

1. Go to setup ? click on Object Manager ? type object name in search bar ? click on the object

2.Now click on "Fields & Relationships" ? New.

Select Datatype (Auto number)

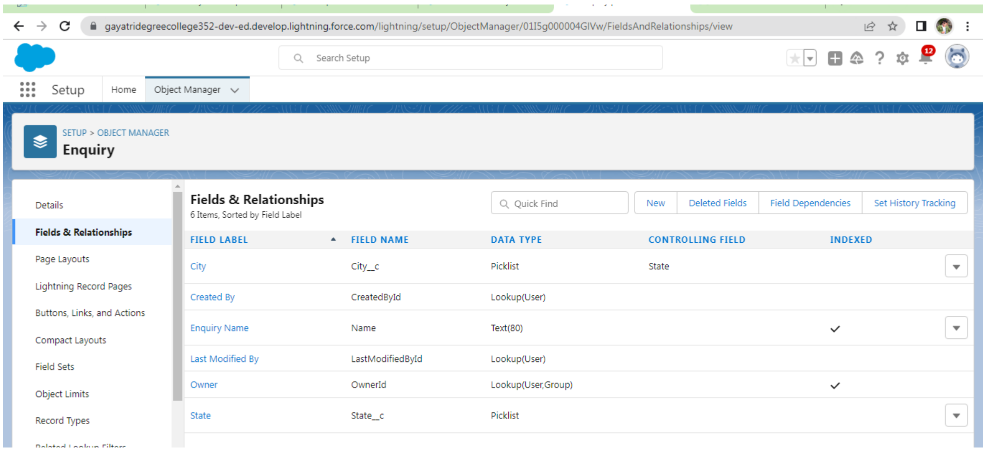
2. Fill the field label name Lead Number, Datatype (autonumber) ?Next ?Next ? Save.
3. Create the remaining Fields:

Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for Below Fields

Create Picklist Field On Enquiry Object:

1. Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.
2. The below steps will assist you in creating Field Dependencies.
3. Click on the gear icon and then select Setup.
4. Click on the object manager tab just beside the home tab.
5. After the above steps, Select enquiry Object
6. Now Select Fields and relationships from setup menu of the enquiry object.
7. Click Field Dependencies.
8. Click New.
9. Select State as the Controlling Field and select City as the Dependent Field.
10. Click Continue.
11. Select the appropriate Value in each column by double-clicking them.
12. Maharashtra:i) Nashik
13.
14. Click Include Values. And it is also same for Gujarat & Rajasthan with its city.

15. Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.
16. Click Close to close the preview window.
17. Click Save.



For Property Object:

1.Customer name (lookup relationship related to Enquiry)

2.Create Property Type: (Picklist fields) (Residential, Commercial, Industrial) (Field Dependency)

3.Residential: Picklist fields (1BHK, 2BHK, 3BHK) (Field Dependency)

4.Commercial: Picklist fields (Shop, Office) (Field Dependency)

5.Industrial: Picklist fields (Factory, Mall) (Field Dependency)

Note: In above picklist fields Property type is control field and Residential, Commercial, Industrial is dependent field

6.State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

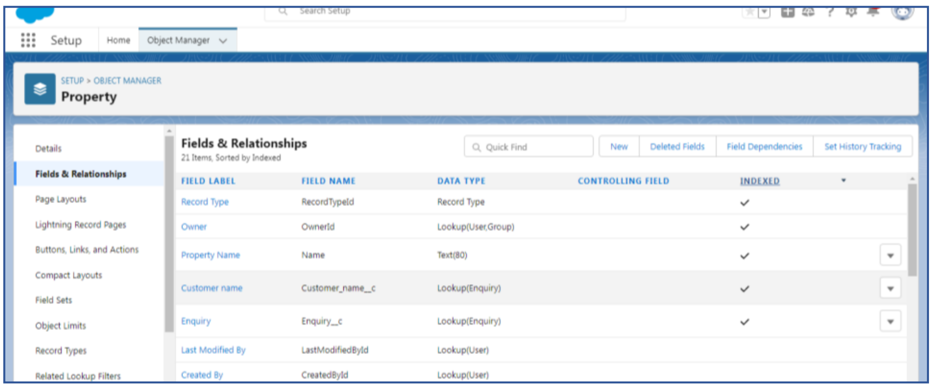
7.City:(Take Any City for Field Dependency)

Note: In above picklist fields State is a control fields and city is dependent field

8.Discount:(Percentage As the Field Data Type)

9.Price: (Number As the Field Data Type)

10.Loan Amount: (Currency As the Field Data Type)



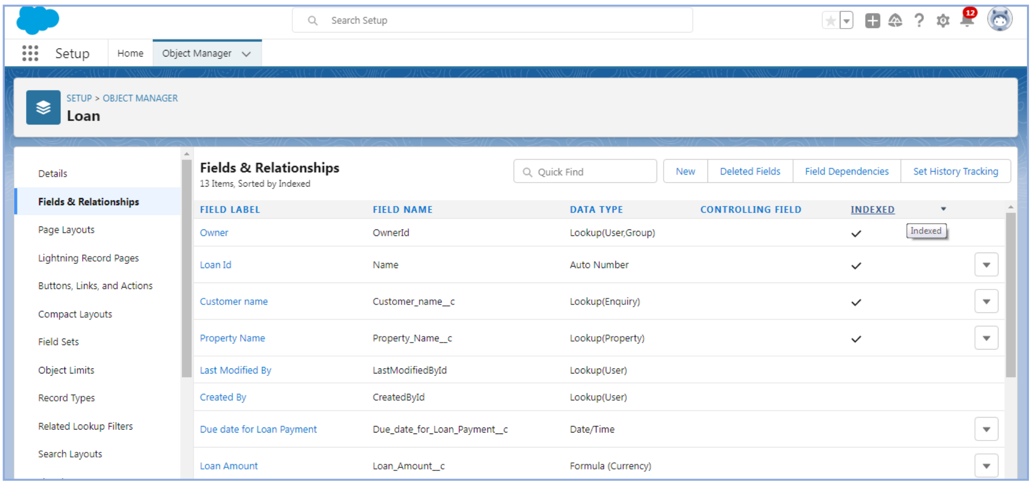
For Loan Object:

1. Property name: (lookup relationship related to property)
2. Customer name: (lookup relationship related to Enquiry)
3. Interest Rate: (Select the Field Data Type As Currency)
4. Term: (Select the Field Data type as Number)
5. Annual Loan: Field create the Number as the field data type
6. Total Loan Installments: (Field create the Number as the field data type)
7. Loan Repayment: (Field create the Number as the field data type)
8. Loan Amount: (Select the Field data type as Formula)

For the Loan Object? Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula

(Loan_Repayment__c* (((1+(Interest_Rate__c/52))^Term__c) -1))/((
Interest_Rate__c/52)*((1+(Interest_Rate__c/52))^ Term__c))

##Check the syntax below whether the formula syntax is correct or not



MILESTONE-6: Page Layout And Record Type

Page Layout in Salesforce allows us to customize the design and organization of detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom object detail and edit pages.

Record types in Salesforce allow you to have different business processes, picklist values, and page layouts to different users based on profile.

Create Page Layout For Property Object:

1. Go to setup ? click on Object Manager ? type object name in search bar ? click on the object
   Now click on "Page Layout" ? New.
2. Recor We can add or remove the the page layout field with the help of drag and drop

Record Type For Property Object:

1. Rec Go to setup ? click on Object Manager ? type object name in search bar ? click on the object
   Now click on "Record type " ? New. ord Type Rent.
2. Create Enter the record type label as (Buy) and selective active checkbox next and save

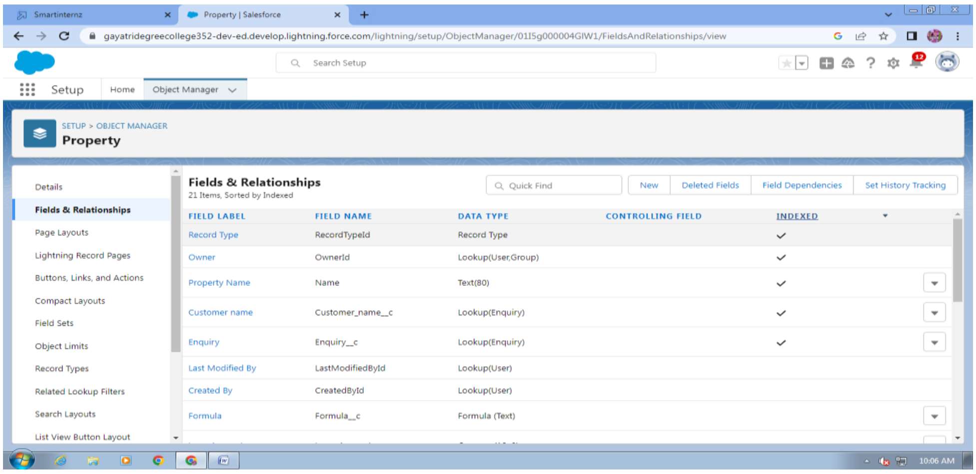
Page Layout Assignment:

- ➢ Go to setup ? click on Object Manager ? type object name in search bar ? click on the object
- ➢ Now click on “page layout ” ? click page layout assignment
- ➢ Select the buy record type and select page layout to use(buy) then click on save.

Page Layout Assignment For Rent:

Follow above 1 to 3 steps

We assign rent page layout for rent record type.



MILESTONE-7: Profile

Create A New Profile:

Go to setup ? type profiles in quick find box ? click on profiles ? clone the desired profile (standard user is preferable).

Enter a Profile Name(Sales Manager) And click on Save

Click on the new created profile

While still on the profile page, then click Edit.

Scroll down to Custom Object Permissions and Give view all access permissions for Lead, Property, Loan and save(Sales Manager also Having Create, Edit, Delete for Lead, property, loan objects)

6.Create Remaining Profiles

Follow the Above Steps to create the Profile just change the Name for below profiles Clone profile (Standard Platform User) for below all profiles

(a). Marketing Executive profile (b). Marketing Manager profile

Create Marketing Executive Profile:

1.Then In The Profile Level Give Read and Create Access for Lead, property, loan objects to Marketing Executive profile and Read, Create, Edit, Delete for the Marketing manager profile for Lead, property, loan objects

2.Marketing Manager profile Should Have Access to Marketing Executive profile

Create Sales Executive Profile

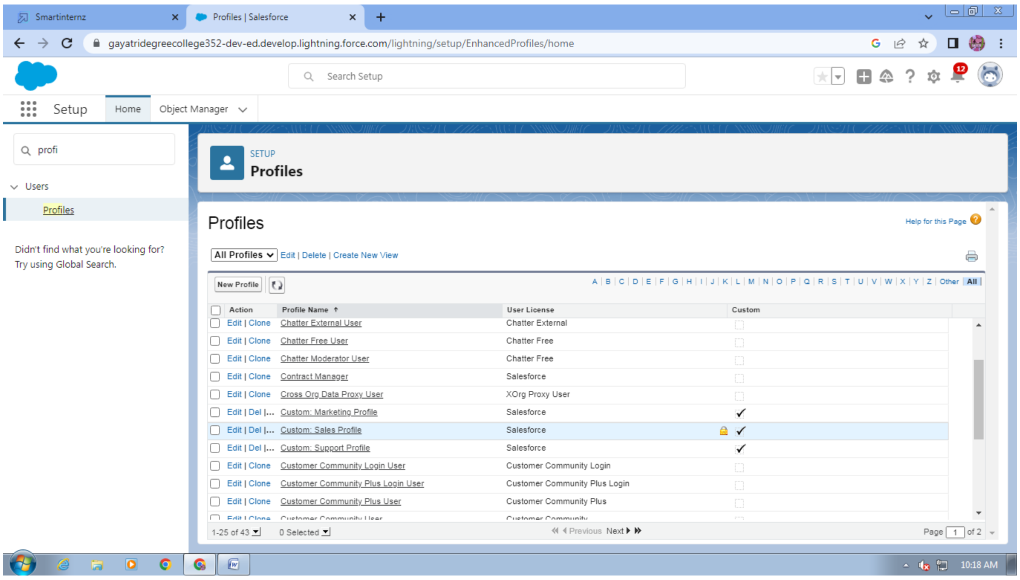
Activity3- Create Sales Executive Profile:

Follow the Above Steps to create the Profile just change the Name for Below profiles clone profile (StandardPlatform User) ,profile name (Sales executive profile).

And assign a sales rep1 permission set

For Sales Rep1? Read, Create, Edit for lead, property and loan objects. For Sales Rep3? Read only.

Note: above 2 are permission set and assign a permission set according to user need. We will discuss in next milestone.



MILESTONE-8: User

Create User:

1. Go to setup ? type users in quick find box ? select users ? click New user.

First Name: Sunny

Last Name: Gupta

Alias: Sanj

Email: provide your personal email id for future reference

Username: sunnygupta@thesmartbridge.com

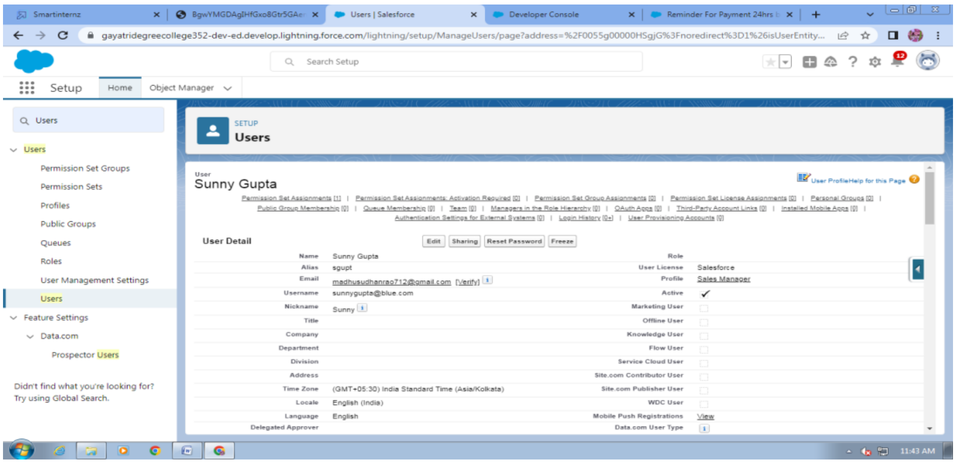
Nickname: Sunny

Role: leave it as default

User License: Salesforce

Profile: Sales Manager and Click Save Button.

Note: Assign Profile according to user requirement.



MILESTONE-9: Permission Set.

Create Permission Set:

1.Go to setup ? type “permission sets” in quick search ? select permission sets ? New

2.Enter the label name (Sales Rep Advance) ? save

3.Select Object settings

4.Search object property and select property object. and click Edit button

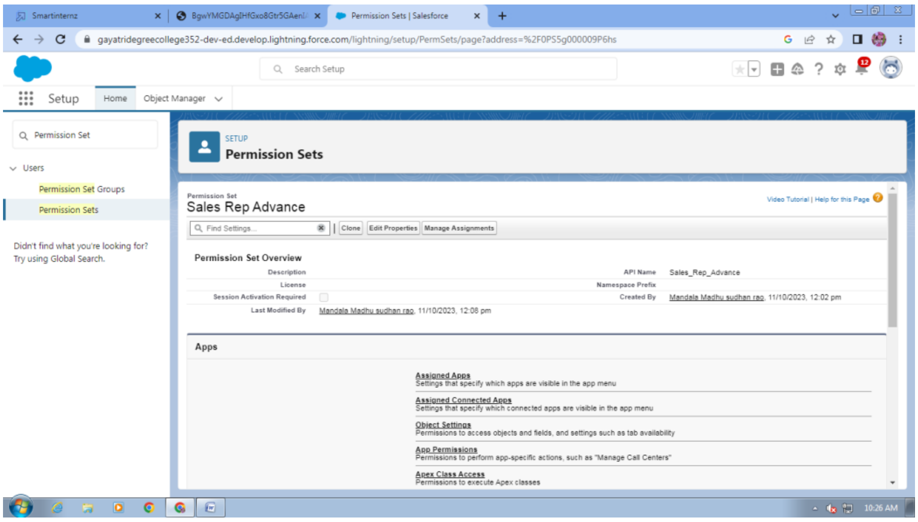
5.In Object Permission we give View all permission. And click save button

6.Repeat 4th and 5th steps for Enquiry and Loan objects.

7.After saving the permission click on the Manage assignment

8.Now click on the Add Assignment

9.Now select the user (sunny) and click on next & assign.



MILESTONE-10: Set Up For OWD

Create OWD Setting:

1.Setup, use the Quick Find box to find Sharing Settings.

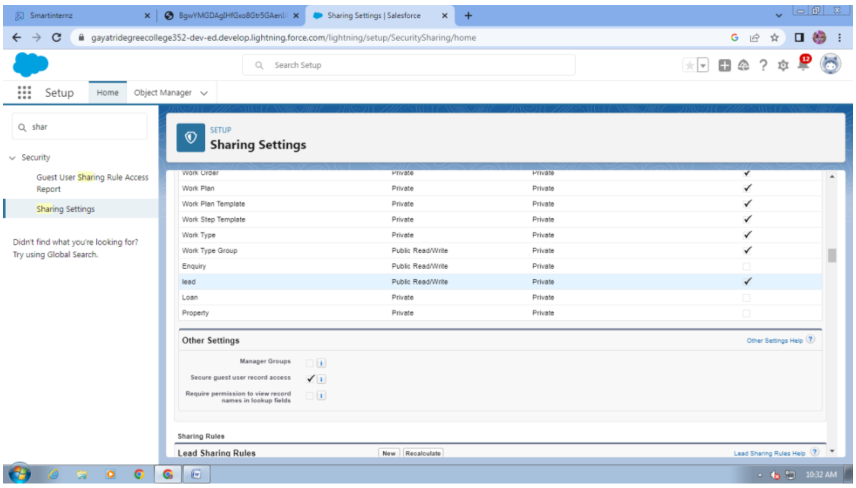
2.Click Edit in the Organization-Wide Defaults area.

3.For each object, select the default access you want to give everyone.

4.To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Enquiry, Property custom object

5.Click Edit and from the Drop Down select private for internal and external

6.This Setting is for all the User Which have been Created



MILESTONE-11: User Adoption

Create A Record(Enquiry):

1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.

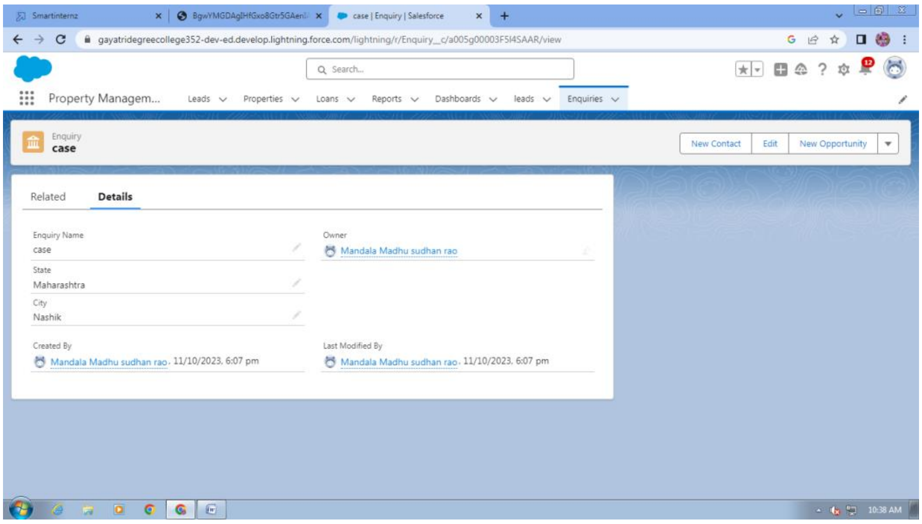
4. Click new and fill details & Save

View A Record(Enquiry):

1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.
4. Click on any record name. you can see the details of the Event

Delete A Record(Enquiry):

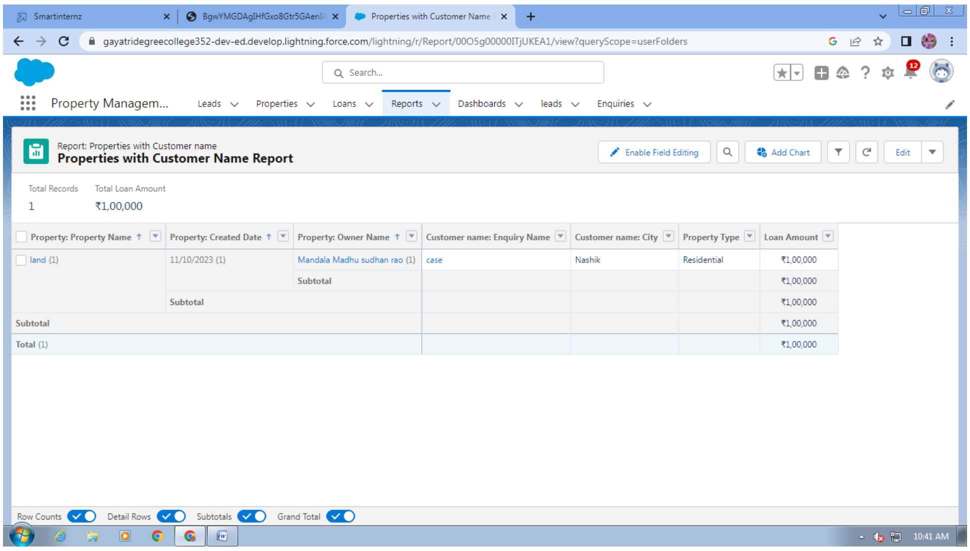
1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



MILESTONE-12: Report

Create Report:

1. Go to the app ? click on the reports tab
2. Click New Report
3. Select report type from category or from report type panel or from search panel (properties with customer name) ? click on start report.
4. Customize your report, add fields like property name, customer name, city, property type etc. Click on save& run (Properties with Customer Name Report)
5. Create Report for following Condition
6. Create the Report of the Total Number of Loan Passed for getting the Amount For the Property
7. The Condition should b e Like Loan Amount >= to 5000$



MILESTONE-13: Dashboards

Create Dashboards:

1.Click the Dashboards tab.

2.Click New Dashboard.

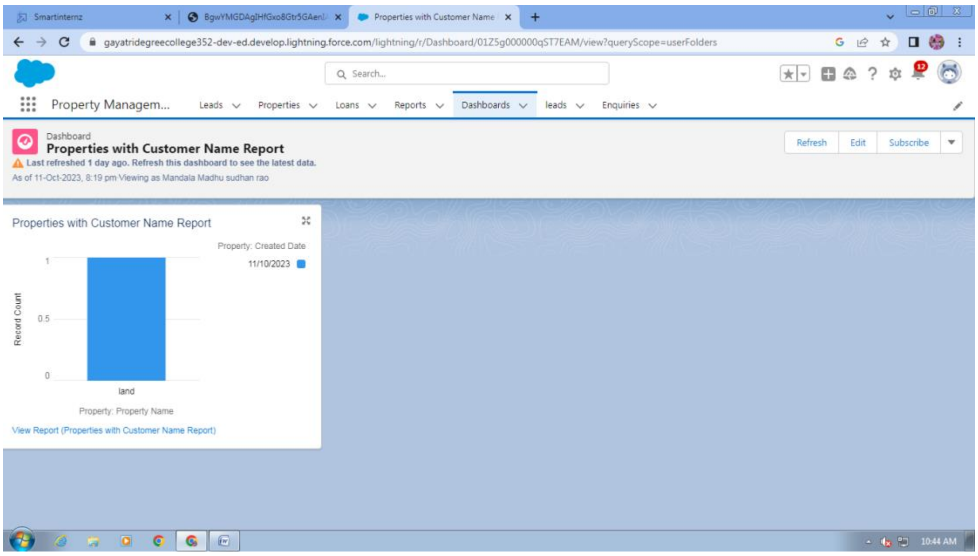
3.Name the Properties with Customer Name Report and click Create.

4.Click +Component.

5.Select the Properties with Customer Name Report and click Select

6.Select the Vertical Bar Chart component(select in which format you want display chart and click Add.

7.Click Save and then Done.



MILESTONE-14: View Report And Dashboard

Report:

1. Click on App Launcher on left side of screen
2. Search property management & click on it.

3. Click on Reports Tab.
4. Click on Properties with Customer Name & see records

Dashboard:

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. 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.

View Dashboard:

1.Click the Dashboards tab.

2.Click New Dashboard.

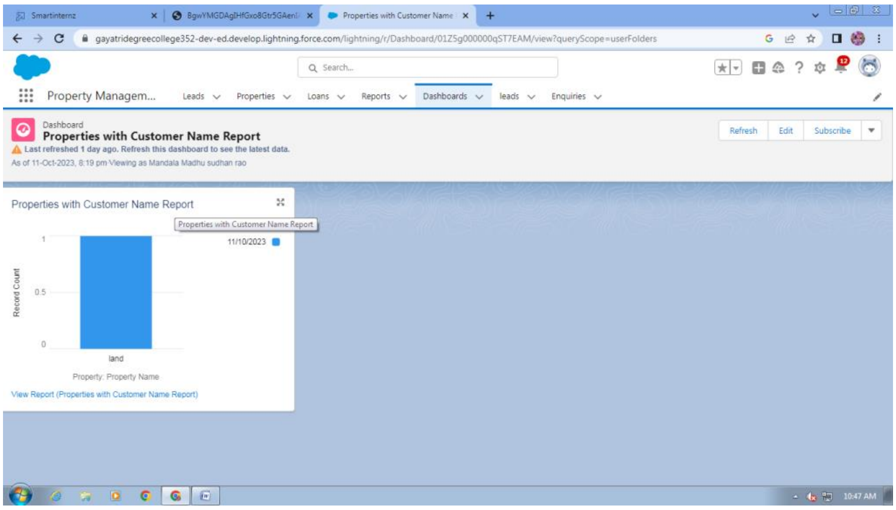
3.Name the Properties with Customer Name Report and click Create.

4.Click +Component.

5.Select the Properties with Customer Name Report and click Select

6.Select the Vertical Bar Chart component(select in which format you want display chart and click Add.

7.Click Save and then Done.



MILESTONE-15: Flow Builder

Classic Email Template:

Go to the Gear Icon?Click on the home button and Search for the Classic Email Template

?Click on the New Template? name?oan Amount Pay Reminder

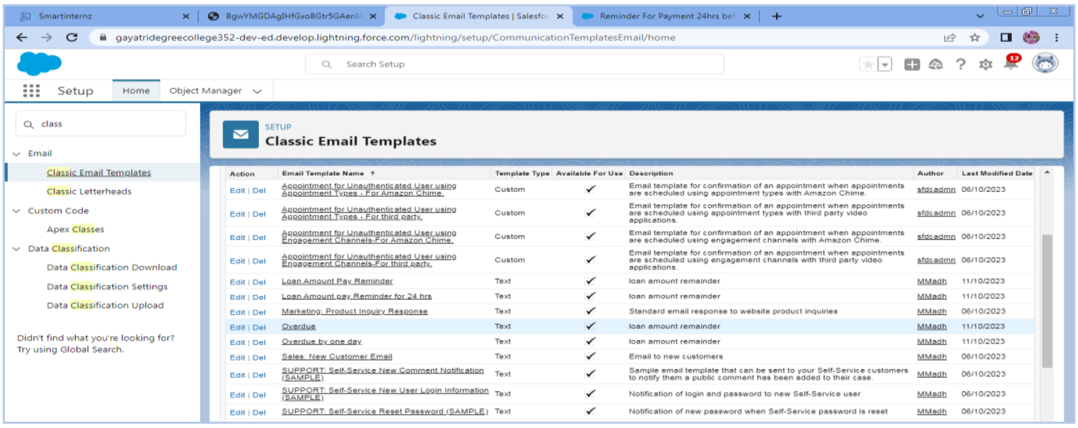
Author as the System admin user?giveDescription?Reminder Calls through emails

Clone that Email Template and follow the steps which is mentioned above and give the following names you have to clone it multiple times that template

1. Loan Amount pay Reminder for 24 hrs

2. Overdue by one day

3. Overdue



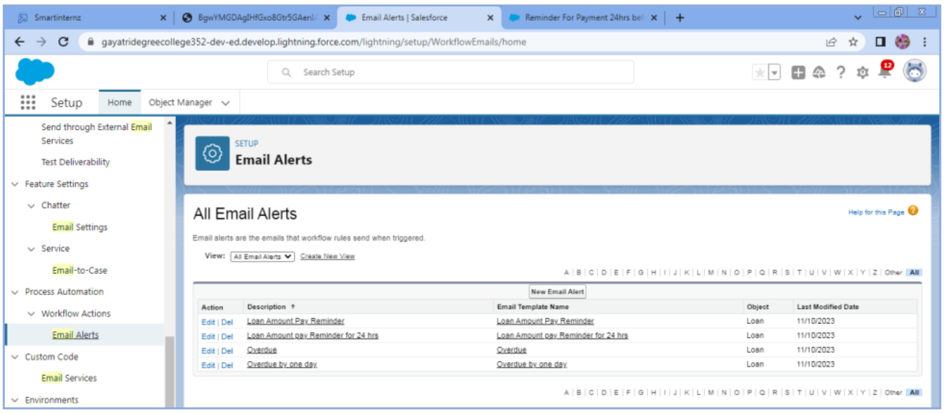
Create The Email Alerts:

Click on the home button and search for the Email Alerts ---> There Click on the New Email alerts ---->and give the name as Email For the 24 hrs before---> select the email template which you have created for the 24 hrs before

There Click on the New Email alerts----> and give the name as Email For the 24 hrs before ---->select the email template which you have created for the 24 hrs before and recipient for all condition is owner

Follow the Above steps and create the Following Email Alert by cloning with the Similar steps

1. Loan Amount Pay Reminder(Cloned Email Alert)
2. Overdue by one day(Cloned Email Alert)
3. Overdue(Cloned Email Alert)



Create The Flows:

- Go to the Home Button and search for the flow
- Click on the New Flow---->Click on the Record Trigger Flow
- Select the loan__c object----> Trigger the Flow When----> A Record is created or updated
- Condition Requirement?All Conditions are met (AND) ----> Field---->Due Date For the Loan PaymentOperator as --->is Nullvalue False
- Click on the Schedule path----> Path Label as---->within 1 Day----> API Name within_1_day?

Time Source? Loan__c:Due Date Loan payment ---> Offset number 24---->offset option

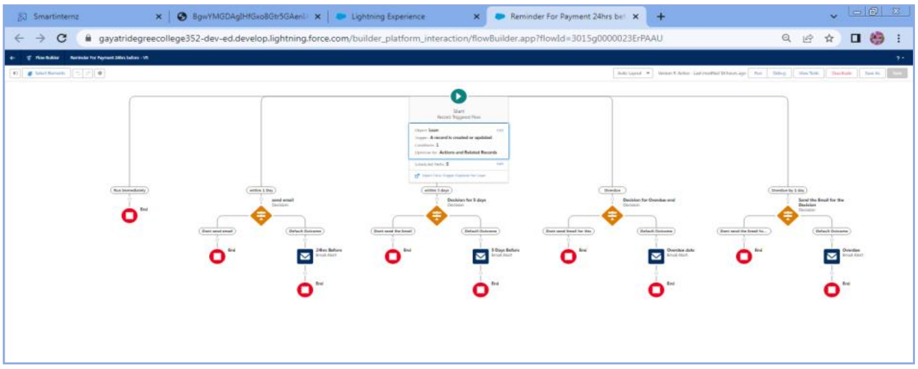
Decision Element:

- Than There is Decision for the just click on add----> select the Decision--->order outcomet--->here are two outcome 1. Send Email 2. don't send the email
- On the outcome is there is the condition for that label don the send email ----> condition Requirement All Conditions are met (AND) ? Operator less than 1
- Follow the same steps for the Following
- On the outcome is there is the condition for that label done the send the email---> condition Requirement All Conditions are met (AND) ----> Operator less than 5
- On the outcome is there is the condition for that label Dont send email for this ----> condition Requirement All Conditions are met (AND) ----> Operator Greater than 0
- On the outcome is there is the condition for that label Dont Send the Email for this ----> condition Requirement All Conditions are met (AND) ----> Operator Greater than 1

1. Go to the layouts change the auto layout with the free for delete both the thread for each decision and create one new connection thread similarly do for all threads and come back to auto layout

Create The Record To Test The Flow:

Go to the App Launcher and select the property management application than Go to the Loan Object create one record with the following values Go to you personal email you will get the mail for the selected date
Here you can see the mail for the 24 hrs before the condition is like duedate – created for the remaining days so it will trigger the email accordingly



MILESTONE-16: Apex Triggers

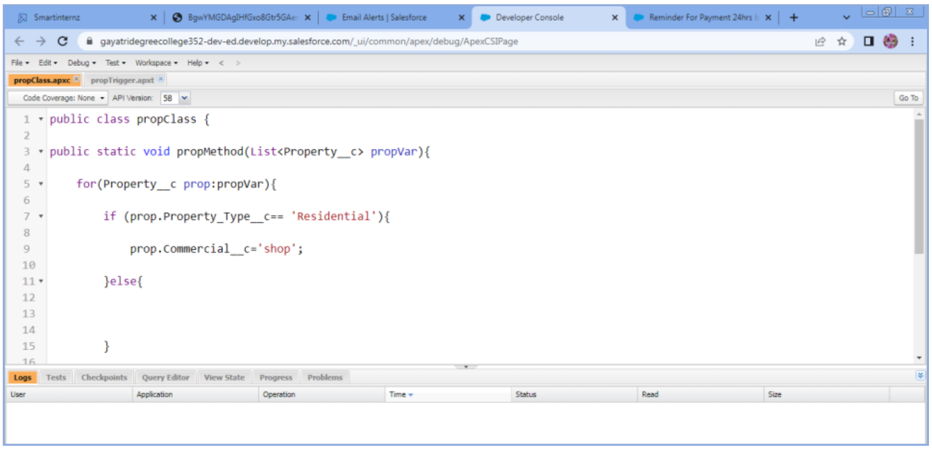
Trigger

Use Case: Apex Trigger is Related to Property Object in that there is the field "Create Property Type" which is having the picklist values in that field(Residential, Commercial, Industrial) the condition is like if we select the Create Property type as "Residential" than there is Commercial field so it should get populated with "Shop"

Apex Class:

```
public static void propMethod(List<Property__c>propVar){
```

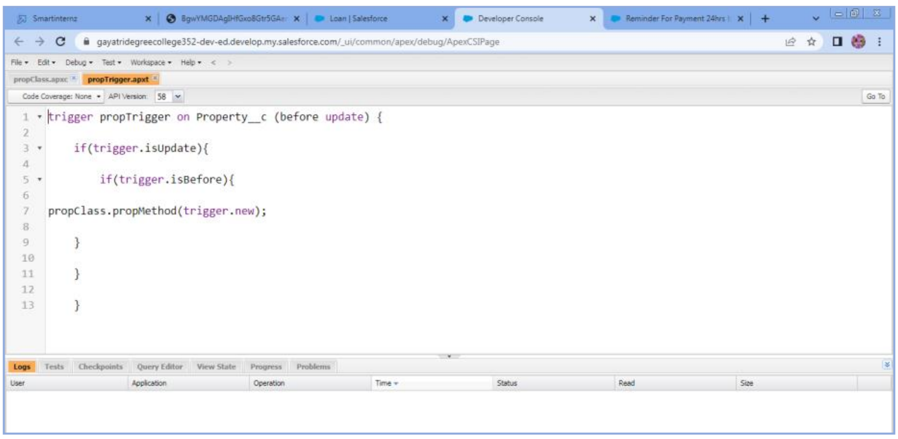
```
public class propClass {
  for(Property__cprop:propVar){
    if (prop.Create_Property_Type__c== 'Residential'){
      prop.Commercial__c='shop';
    }else{


    }
    }
    }
```



Trigger Class:

```
  trigger propTrigger on Property__c (before update) {
  if(trigger.isUpdate){
    if(trigger.isBefore){
propClass.propMethod(trigger.new);
  }
  }
  }
```

- Just Go to the Property Object and Check Whether Your Trigger Is Working or not as per the requirement



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