



Property Management Application Using Salesforce

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PROJECT REPORT

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Proprty

BONAFIDE CERTIFICATE

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CHAPTER-I

PROJECT SPECIFICATION

1.1 Project Goal

Define the scope and objectives of the application. Identify key features, user roles, and data requirements. Set up Salesforce with the necessary licenses, objects, and fields. Customize Salesforce to accommodate property management data. Design a data model to represent properties, tenants, leases, and other relevant information. Define user roles and permissions to control access to data and functionality. Use Salesforce Process Builder, Flow, or Apex to automate processes like lease renewal reminders, maintenance requests, and rent payments. Create a user-friendly interface using Salesforce Lightning components and Visualforce pages to interact with property data. Integrate with other systems if needed, such as financial software for rent collection or maintenance management tools. Develop customized reports and dashboards to provide insights into property performance, occupancy rates, and financials.

Ensure the application is accessible on mobile devices for property managers on the go. Thoroughly test the application to ensure it functions as expected and is user-friendly. Train users and provide documentation to help them navigate and use the application effectively.

Deploy the application to the production environment and monitor its performance. Continuously monitor and update the application to address issues and accommodate changing requirements. Implement security measures to protect sensitive property and tenant data. Ensure the application complies with relevant legal and industry standards, especially in property management. Collect feedback from users and stakeholders to make improvements and enhancements.

1.2 Project scope

Record and monitor financial transactions related to property management, including rent collection, expenses, and budgeting. Generate financial reports to track property income and expenses. Set up communication tools for sending notifications to tenants and property owners. Send automated reminders for rent payments and maintenance appointments. Create custom reports and dashboards to

provide insights into property performance, occupancy rates, and financial metrics. Define user roles and permissions to ensure data security and access control. Property managers, owners, and tenants may have different levels of access. Integrate with external systems if necessary, such as accounting software, for seamless financial management.

Ensure that property managers and tenants can access the application via mobile devices for convenience. Ensure that the application complies with relevant property management and data privacy regulations. Provide training for users and create documentation to help them navigate the application. Rigorously test the application to identify and resolve bugs and issues. Plan for the deployment of the application in a production environment. Develop a maintenance plan to address future updates, bug fixes, and enhancements. Consider the potential for scaling the application to accommodate a growing number of properties and user. Establish a feedback mechanism to collect input from users and stakeholders for ongoing improvements. Define a project timeline and budget to ensure the project is completed within specified constraints.

1.3 Problem Statement Definition

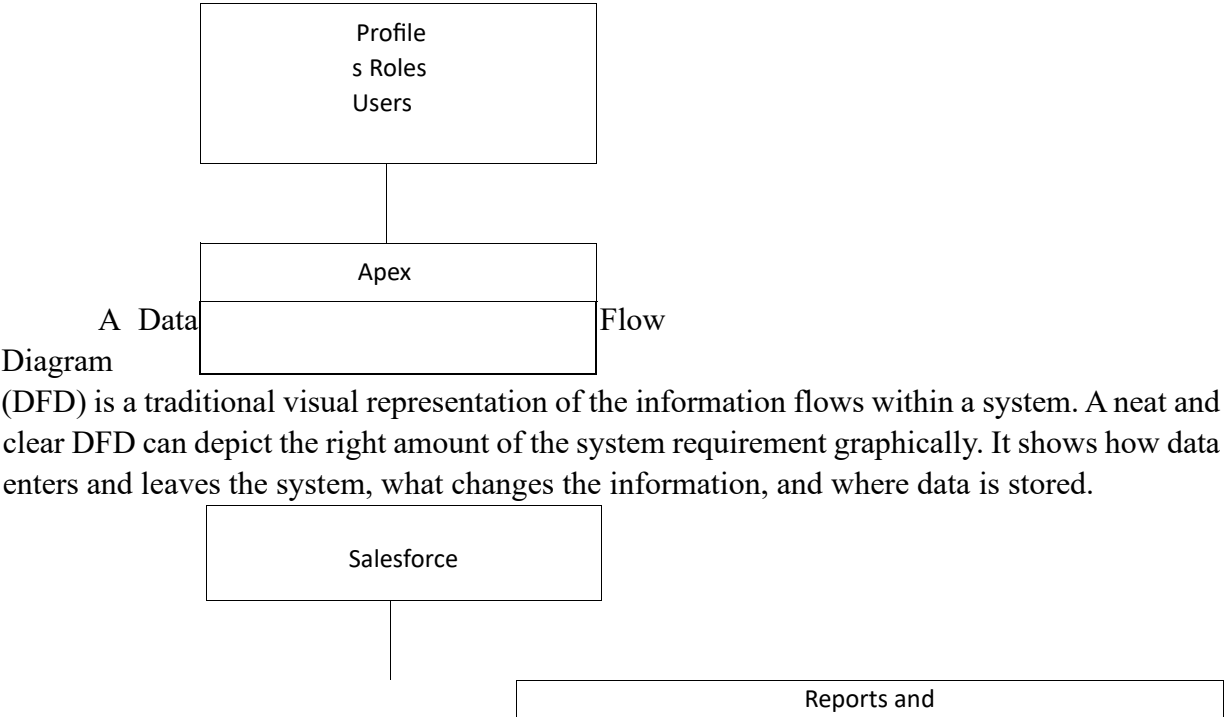
EMPLOYEE	I'm trying to			Because	Which makes me feel
	I am trying to streamline and Simplify the process of submitting trackirw and approving travel requests to ensure a smoother travel experience	But But the current process is manual, time-consuming, and lacks transparency, resulting in delays and confusion.	Because Because this inefficiency in the travel approval process creates frustration, adds unnecessary administrative work, and can lead to financial discrepancies.	Which makes me feel Because this inefficiency in the travel approval process creates frustration, adds unnecessary administrative work, and can lead to financial discrepancies.	Which makes me feel frustrated, anxious about travel plans often and uncertain about the status of my request. ultimately affecting my satisfaction a and productivity.

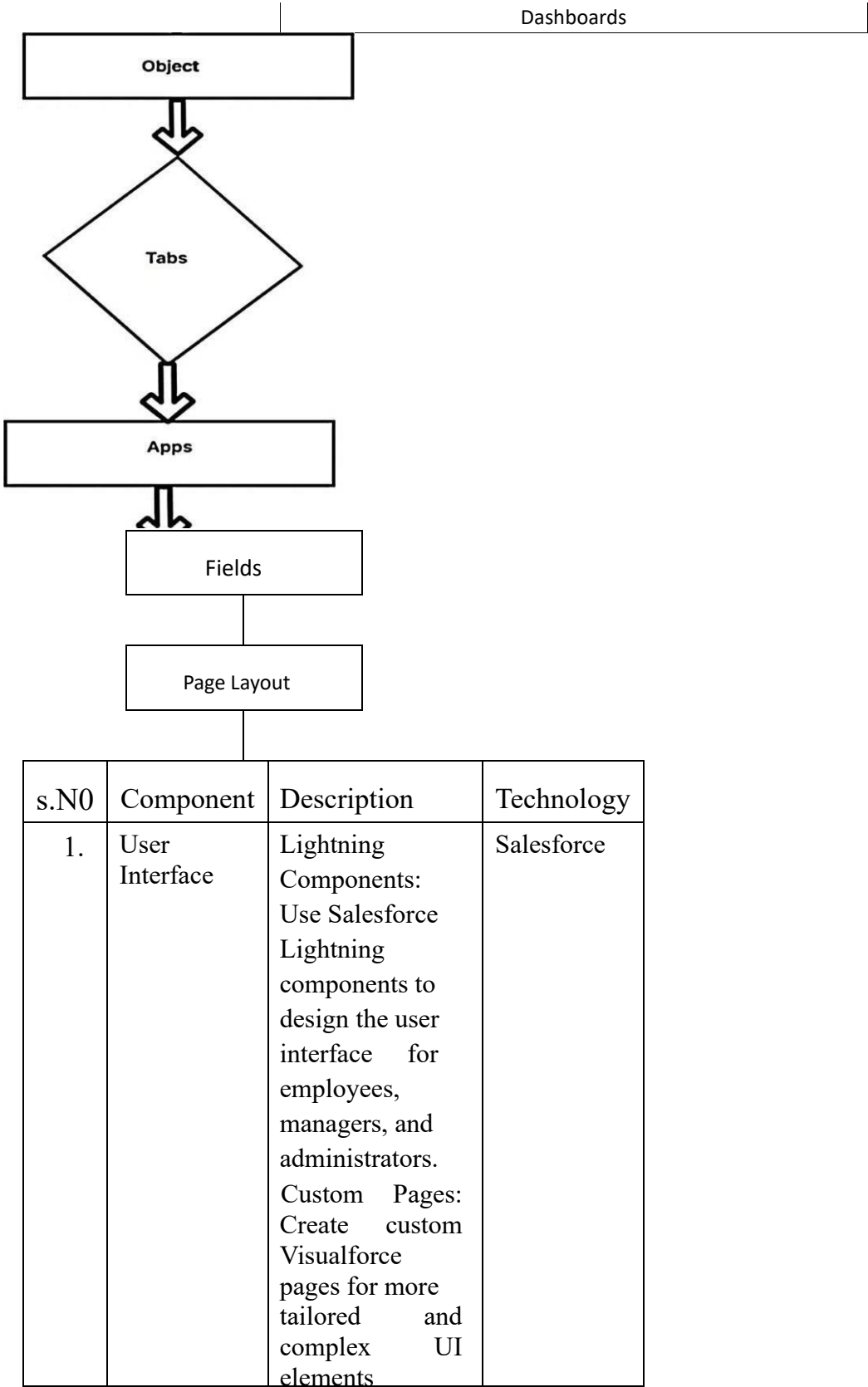
miro

Problem Statement	I am (Employee)	I'm trying to	But	Because	Which makes me feel
PS	Student	I am trying to manage the students, teachers record for the short period in the way of application.	But the current process is manual, timeconsuming, and lacks transparency , resulting in delays and confusion.	Because this inefficiency way to find and track the students and teachers through the application.	ich akes me feel rustrated, anxious ften ncertain about the status of my request,

						Itimately affecting Y overall satisfaction and roductivity
--	--	--	--	--	--	-------------------------------------------------------------------------------

1.4 Project Road Map
1.4.1 Data Flow Diagram





1.4.2 Technical Archictecture

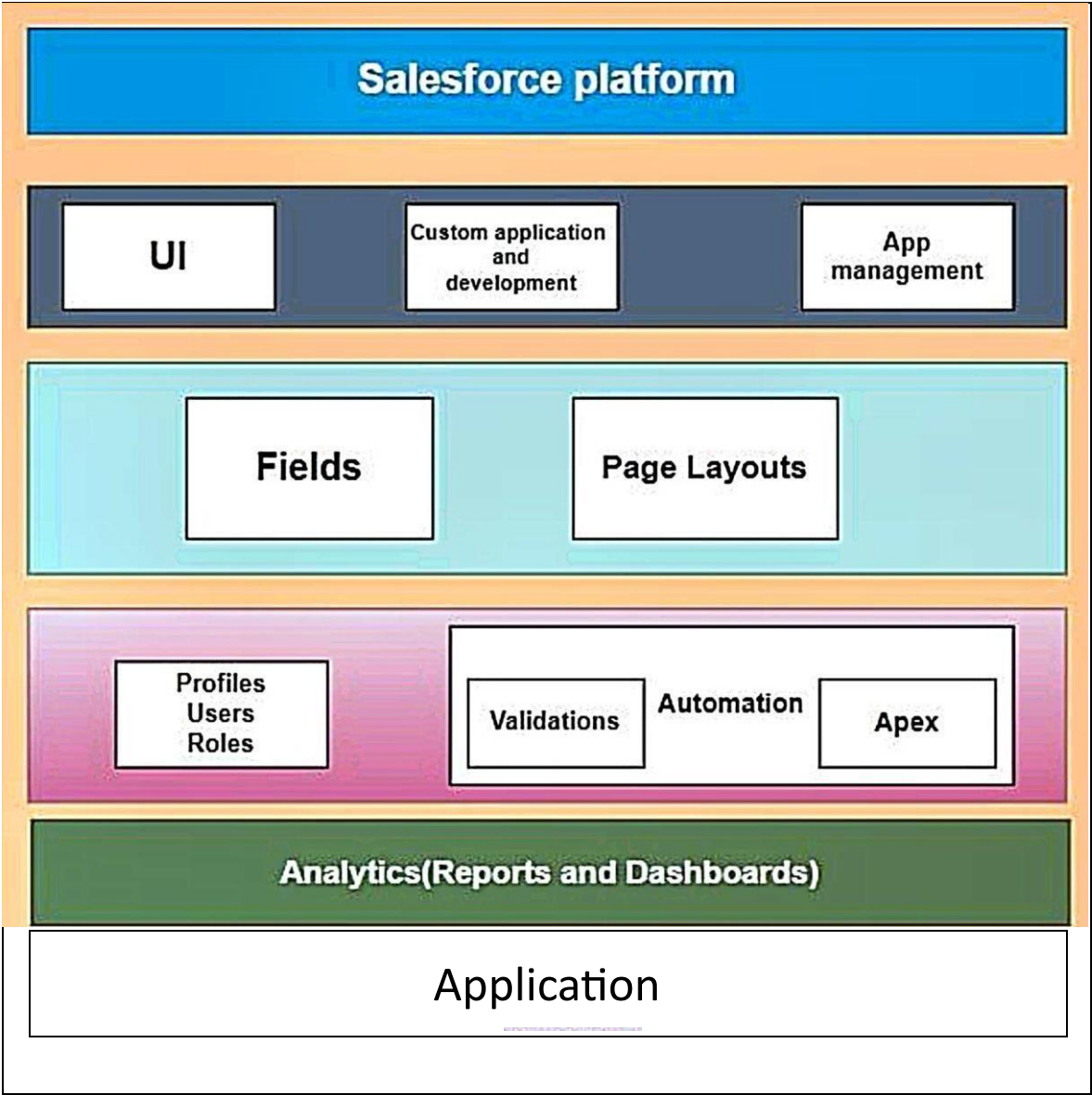


TABLE-I: Component and Technologies:

2.	Data Model	<p>Custom Objects: Define custom objects in Salesforce to represent entities like travel requests, expenses, and approvals.</p> <p>Master-Detail and Lookup Relationships: Establish relationships between objects to maintain data integrity.</p> <p>Custom Fields: Create custom fields to capture specific information, such as parents, students, and teachers.</p>	Salesforce
----	------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------

3.	Workflow Automation	Approval Processes: Implement Salesforce Approval Processes to automate and streamline the travel request approval workflow. Process Builder and Flows: Use Process Builder and Flows to automate routine tasks and send notifications.	Salesforce
4.	Reporting and Analytics	Custom Reports: Create custom reports to track travel request status, expenses, and other relevant metrics.	Salesforce
5.	Security	Role-Based Access Control (RBAC): Configure RBAC to control who can access and modify data. Data Encryption: Encrypt sensitive data both in transit and at rest. Audit Trails: Maintain audit trails to log user activities for security and compliance purposes.	Salesforce
6.	Salesforce Development	Apex: Use Salesforce's proprietary programming language, Apex, for server-side logic and data manipulation. Visualforce: Develop custom user interfaces with Visualforce pages and components. Lightning Web Components: Create modern, component-based UIs using Lightning Web Components for a more responsive and dynamic user experience	Salesforce

Table-2: Application Characteristics:

S. No	Characteristics	Description	Technology
1.	Responsive Design	Implement responsive design to adapt to various screen sizes, ensuring a consistent and visually pleasing user experience.	salesforce

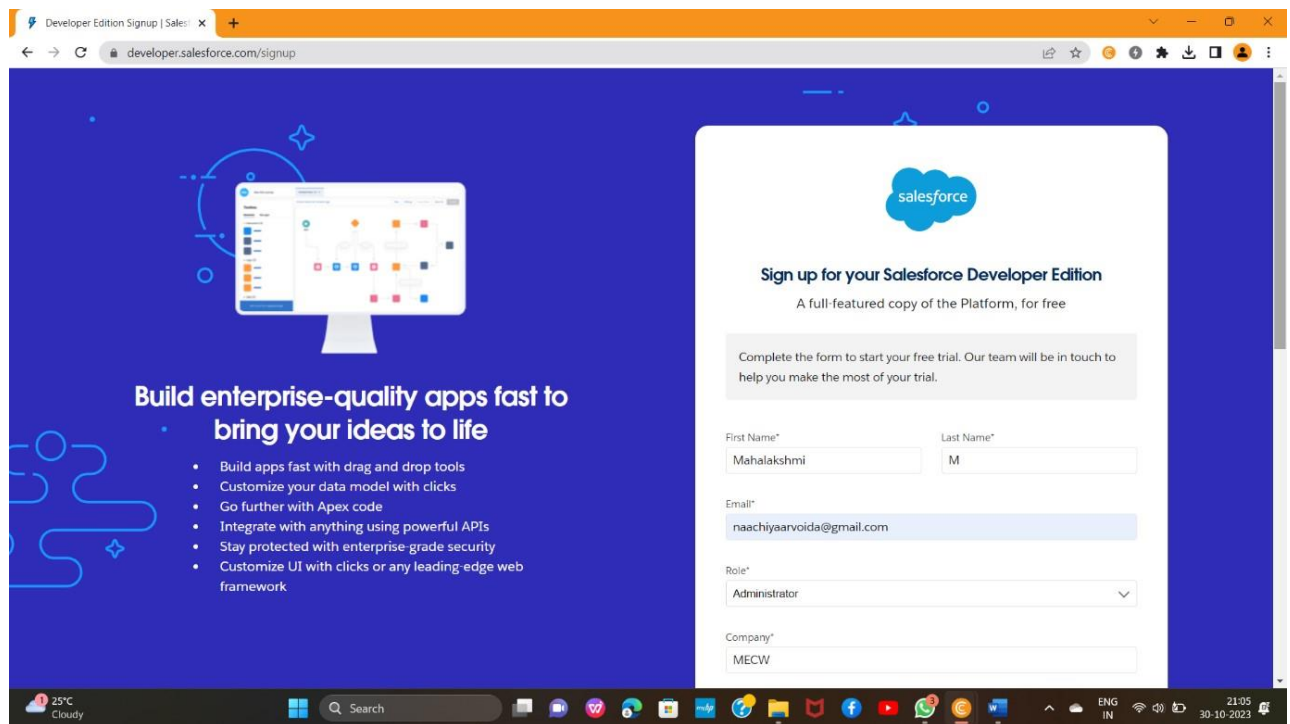
2.	Accessibility	Ensure that the application is accessible via multiple devices and browsers, catering to users on desktops, tablets, and mobile devices. This accessibility is crucial for users who need to make or approve travel requests while on the go.	salesforce
3.	Userfriendly	The application should have an intuitive and user-friendly interface to make it easy for employees, managers, and administrators to navigate and use the system without extensive training.	Salesforce
4.	Scalability	The application should be able to scale with the growing number of users and data, accommodating increasing demands without significant performance degradation.	salesforce
5.	Performance	Ensure the application's performance meets or exceeds user expectations, with rapid response times for actions such as submitting requests or generating reports.	salesforce
6.	Reporting and Analytics	Enable users to generate custom eports and access analytics tools to gain insights into travel patterns, expenses, and approval efficiency.	salesforce

CHAPTER-2

PREPARATION DATA MODELING

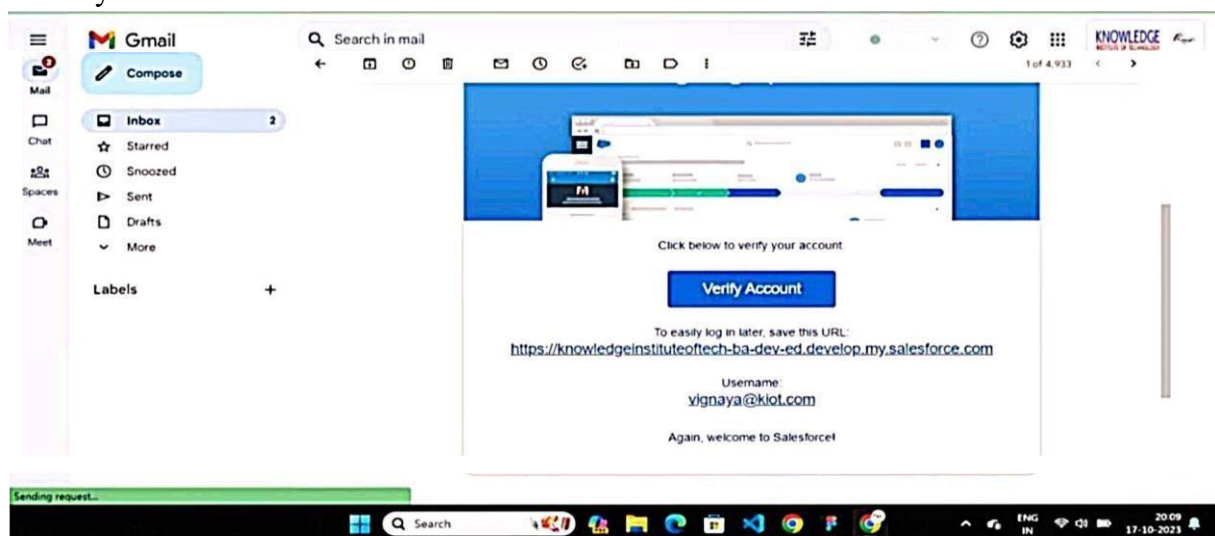
2.1 Salesforce Developer Org

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.



Account Activation

Activation tracks information about devices from which users have verified their identity.



Change Your Password

Enter a new password
Make sure

to include at least

to include at least

- ☒ 8 characters
- ☒ 1 letter
- ☒ 1 number

* New Password

Good

* Confirm New Password

Match

Security Question

▼
What is your pet's name?

* Answer

Jackie

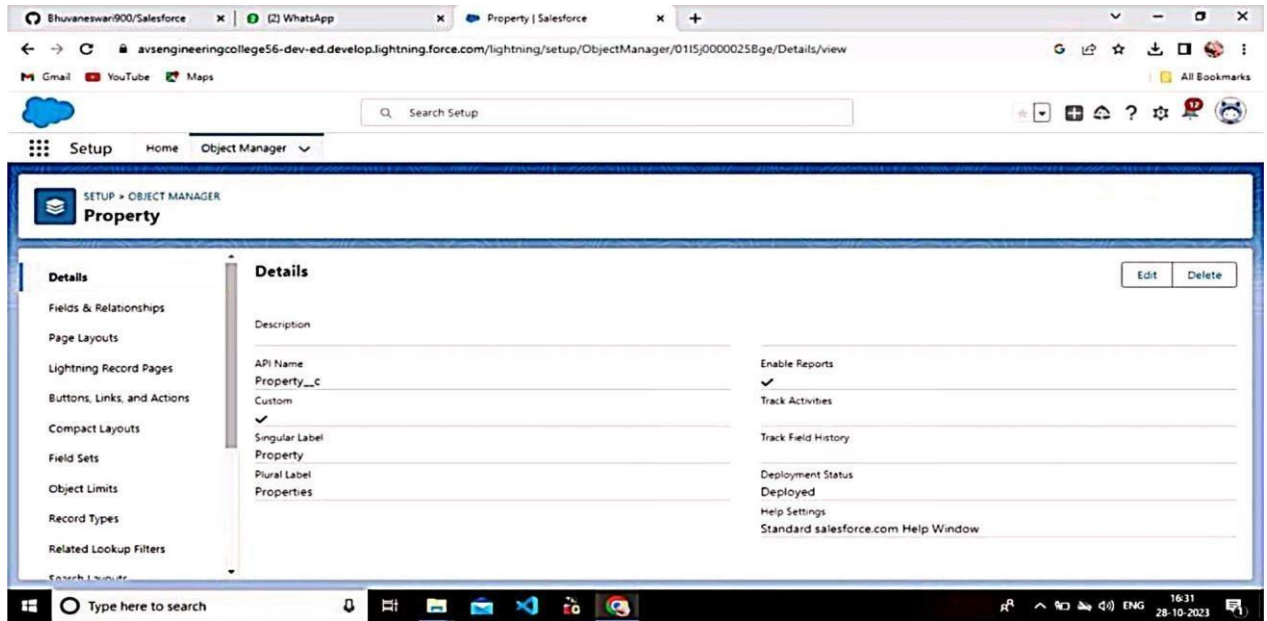
Change Password

Windows Search
Taskbar icons
System tray: ENG IN, 20:10, 17-10-2023

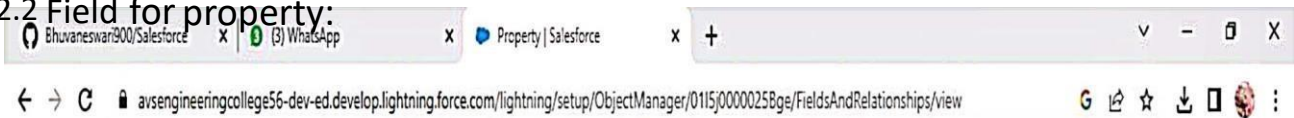
2.2 Custom Object Creation & Tabs

2.1 Custom Object Creation

Objects are containers for your information, but they also give you special functionality. Custom objects are create to store information that's specific to your company or industry. Custom Objects in Property management application:



2.2 Field for property:



The screenshot displays the Salesforce Setup interface. At the top, there are links to Gmail, YouTube, and Maps, along with a search bar labeled 'Search Setup'. The main navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows a list of 5 items, sorted by Field Label. The table below lists the fields for the 'Property' object.

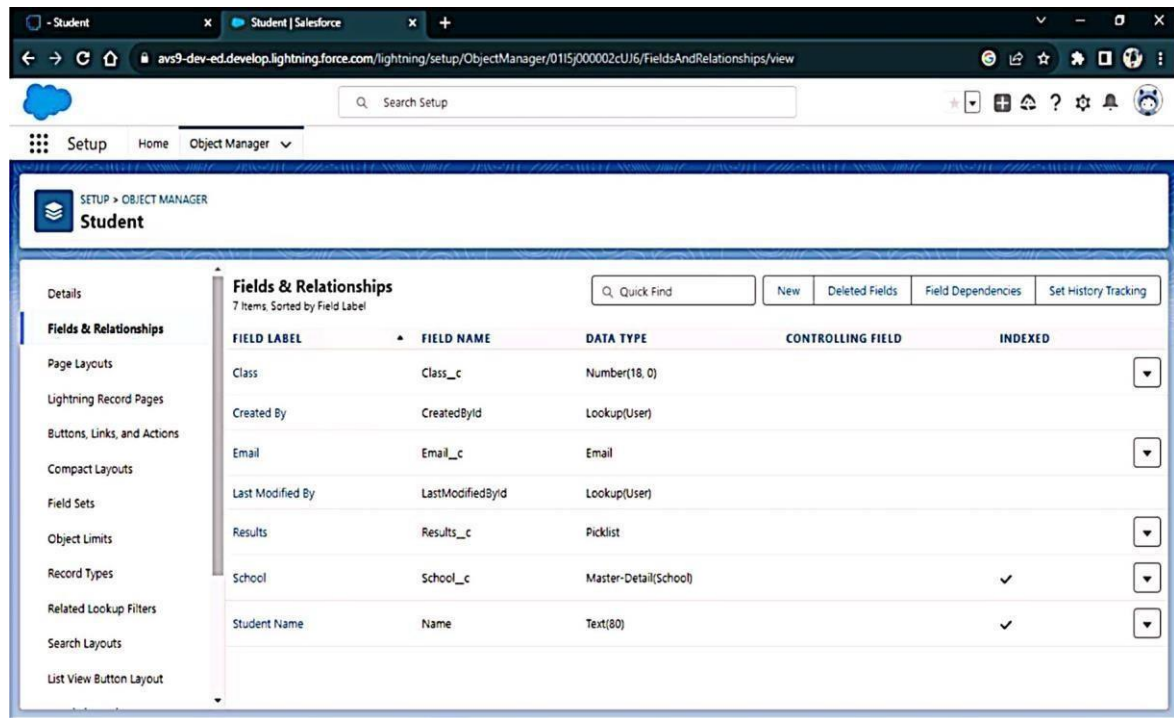
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Property Name	Name	Text(80)		✓
Record Type	RecordTypeId	Record Type		✓

The URL at the bottom of the browser window is: <https://avsenengineeringcollege36-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0115/00000258ge/FieldsAndRelationships/view>

2 Objects are containers for your information, but they also give you special functionality.

Custom objects are created to store information that's specific to your company or industry.

Custom Objects in LOAN.

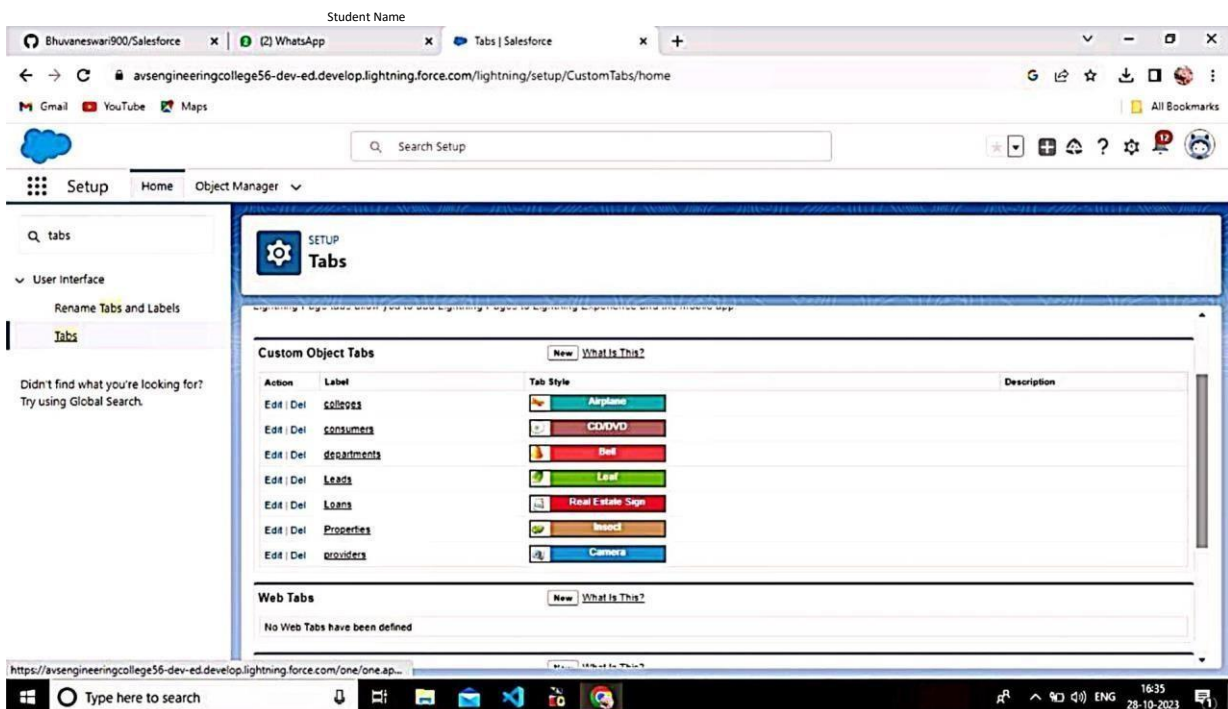


The screenshot shows the Salesforce Setup interface for a custom object. The left sidebar lists various setup options, and the main area displays the 'Fields & Relationships' section for a custom object. The table below lists the fields and their properties.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class_c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Results	Results_c	Picklist		
School	School_c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

2.3 TABS: FIELD LABEL .

Last Modified By



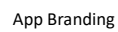
The screenshot shows the Salesforce Setup interface for the 'Tabs' section. The left sidebar lists various setup options, and the main area displays the 'Custom Object Tabs' and 'Web Tabs' sections. The table below lists the custom object tabs and their properties.

Action	Label	Tab Style	Description
Edit Del	colleges	Airplane	
Edit Del	consumers	CD/DVD	
Edit Del	departments	Ball	
Edit Del	Leads	Leaf	
Edit Del	Loans	Real Estate Sign	
Edit Del	Properties	Invoice	
Edit Del	providers	Camera	

Web Tabs: No Web Tabs have been defined.

2.4 Create the lightning app:

An app is a collection of items that work together to serve a particular function. In lightning experience lightning apps give your users access to set of objects, tabs, and other items all in one



Utility Items (Desktop Only)

Navigation Items flower User Profiles * Developer Name O Bhuvaneswari_Shanmugam

* App Name O Image O Primary Color Hex Value O

Description o
Enter a description,,. Org Theme Options

Clear
•⁴ Use the app'S image and color instead of the org's custom theme

App Launcher Preview

2.5 LIGHTNING G FIELD:

Lead | Salesforce

avsengineeringcollege56-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j00000258gZ/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Lead

Details

Fields & Relationships
4 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

19:53 28-10-2023

Created By	Created ById	Lookup(User)
Customer Name	Name	Text{80}
Last Modified By	LastModifiedById	Lookup(User)
	OwnerId	Lookup(User,Group)

SETUP > OBJECT MANAGER

Property

Details

Fields & Relationships

Page Layouts

Record Pages

Buttons, Links, and Actions

compact Layouts

Field sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Property Detail

Edit Delete)

Clone Change Owner

Change Record

Printa View

Sharing

* O property

Marne Sa mple Text

Customer Name

Sample Text property

Type Sem le Text

State

City

Sample Text

Sa mple Text

Section

Blank Spao

City

to

customize the actions in the Quick Actions in the Salesforce Classic Publisher section. and have saved the layout. then this section inherit.

that set of actions by defaun when you click to overrr8e.

Stsndard eutlons

Sharing H ierarchy

information (Header Viniblo Ott edit

Owner sample-lexi

Custom Buttons

Created By

Name

Lead Id

Industrial

price

Property Name

Label: Lst Modified By

Type' Lookup

This item Is currently In use (Clio

Laon Amount

Last Modified By

Property Name

Label: Lst Modified By

Type' Lookup

This item Is currently In use (Clio

Save • Quick Save Preview

Cancel O Ljndo

Redo

2.6 PERMISSION SET

WhatsApp

Permission Sets | Salesforce

+

avsenengineeringcollege56-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P5J00000860Io

G

☆

Permission Sets | Salesforce

Gmail

YouTube

Maps

All Bookmarks

Setup

Home

Object Manager

Search Setup

Q permis

v Users

SETUP

Permission Sets

Permission Set Groups

Permission Sets

v Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

Permission Set Groups

v Custom Code

Permission Sets

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set

Sales_Rep3

Video Tutorial | Help for this Page

Find Settings...

Clone

Delete

Edit Properties

Manage Assignments

View Summary (Beta)

Permission Set Overview

Description

License

Session Activation Required

Permission Set Groups Added To

API Name

Namespace Prefix

Created By

Last Modified By

Sales_Rep3

Bhuvaneswari Shanmugam 26/10/2023, 7:02 pm

Bhuvaneswari Shanmugam 26/10/2023, 7:07 pm

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

wascri

Type here to search

QJ) ENG

28:14

2.7 FIELD:

The screenshot shows a web browser window with the URL: <https://www.salesforce.com/lightning/setup/ObjectManager/0115/00000258go/FieldsAndRelationships/view>. The page title is "SETUP > OBJECT MANAGER Loan". The left sidebar shows the navigation menu with "Fields & Relationships" selected. The main content area shows the "Fields & Relationships" section for the "Loan" object, with 4 items sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Id	Name	Auto Number		✓
Owner	OwnerId	Lookup(User,Group)		✓

2.8 PAGE LAYOUT:

Proprty

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	2 Lookup(User,Group)		

(1) WhatsApp

Lead | Salesforce

+

avsenengineeringcollege56-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j00000258gZ/FieldsAndRelationships/view

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Lead

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Fields & Relationships

4 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

https://avsenengineeringcollege56-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0115j00000258gZ/FieldsAndRelationships/view

Type here to search

19:53 28-10-2023

CHAPTER-3

3.1 User :

Before customizing the travel app, first create a new user, Eric Executive, and set him up as manager. This involves assigning roles and profiles so that Eric has the correct permissions to approve travel requests.

WhatsApp

Users | Salesforce

avsenineeringcollege56-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000AWyFa%2Fe%3FisUserEntityOverride%...

GmailYouTubeMaps

All Bookmarks

Search Setup

SetupHomeObject Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messagina for In-App

Type here to search

SETUP

Users

User Edit

Sunny Gupta

Help for this Page

User Edit

SaveSave & NewCancel

General Information

Required Information

First NameSunny

Last NameGupta

Aliassgupt

Emailbhuvaneswarishanmugam20

Usernamebhuvaneswaris2002@gmail

NicknameUser1698314626853529077

Title

Company

Department

Division

Role<None Specified>

User LicenseXOrg Proxy User

ProfileCross Org Data Proxy User

Active☒

Marketing User☐

Offline User☐

Knowledge User☐

Flow User☐

Service Cloud User☐

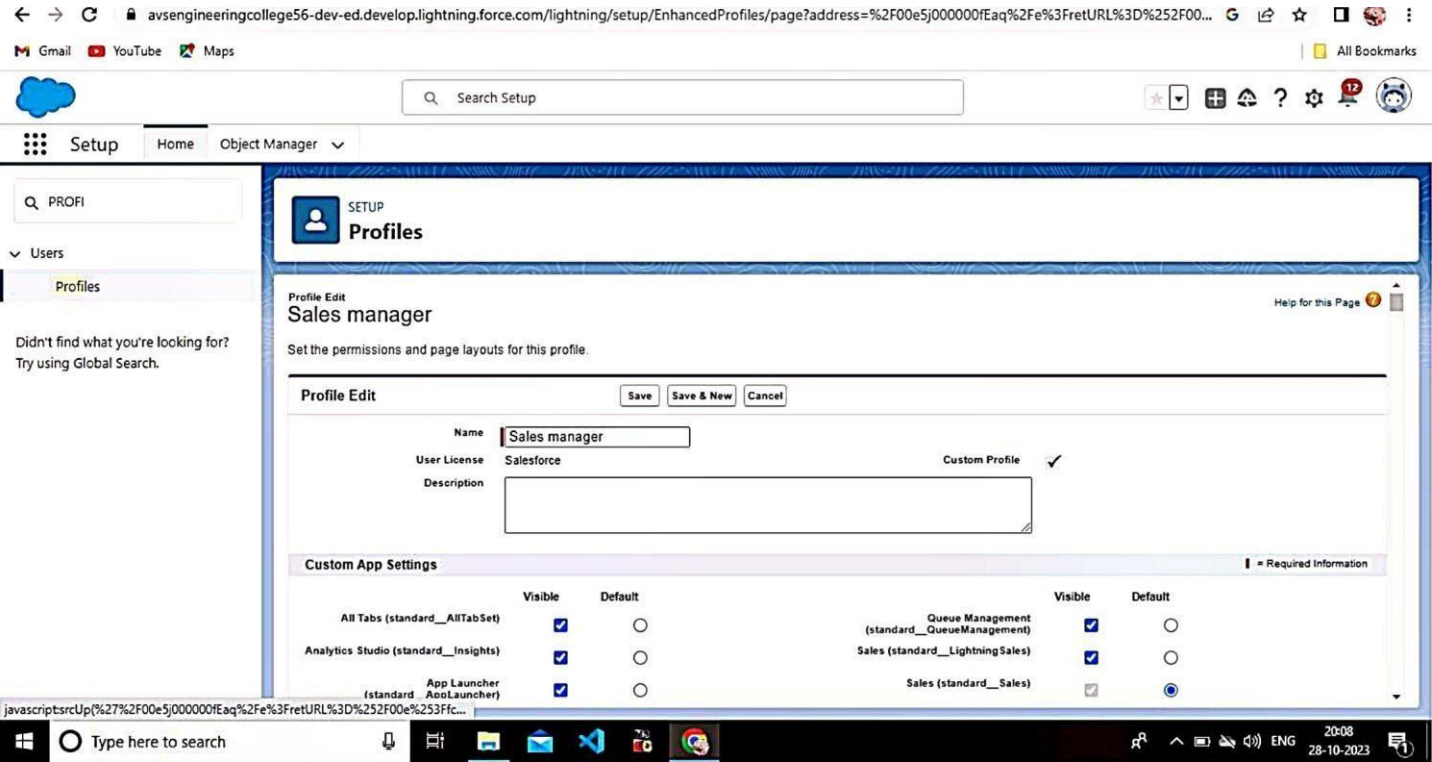
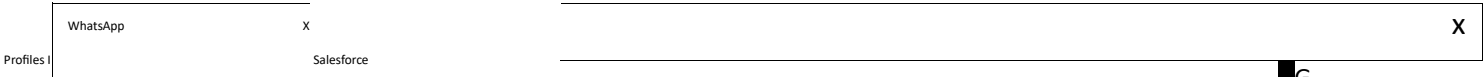
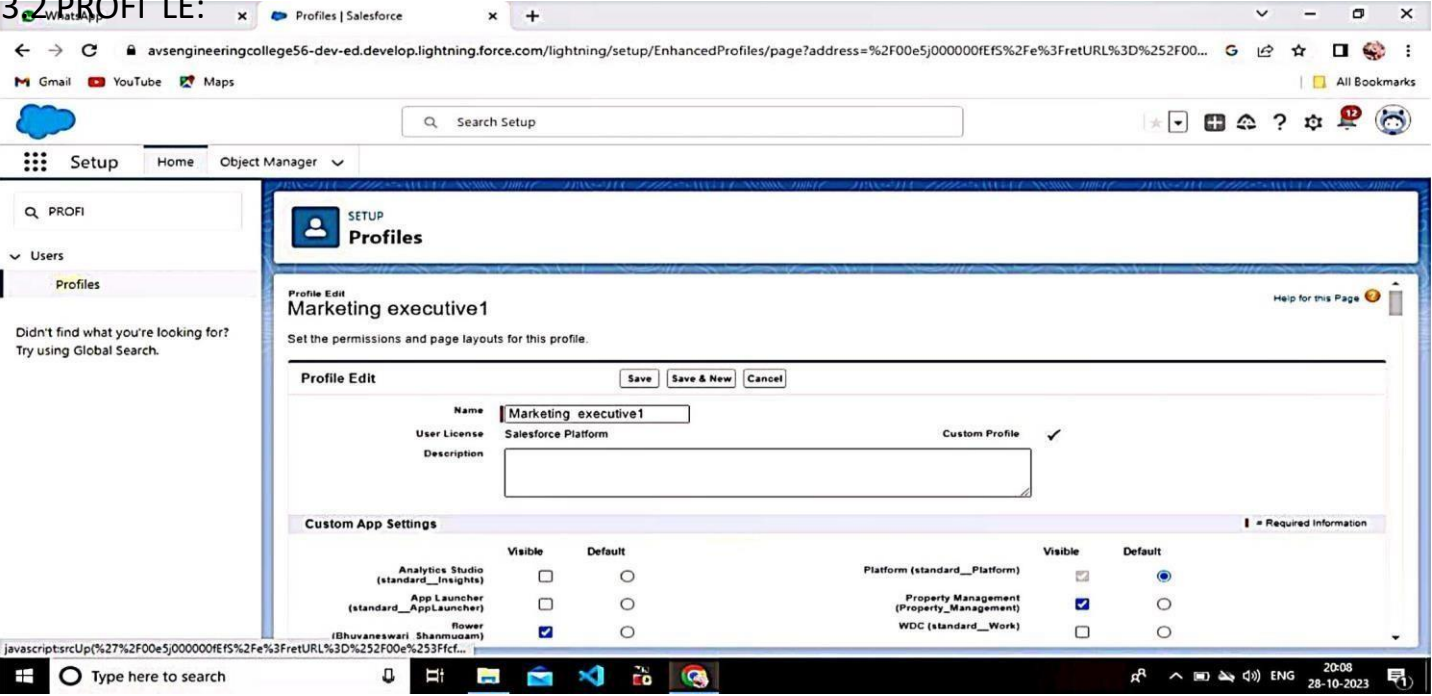
Site.com Contributor User☐

Site.com Publisher User☐

20:10

28-10-2023

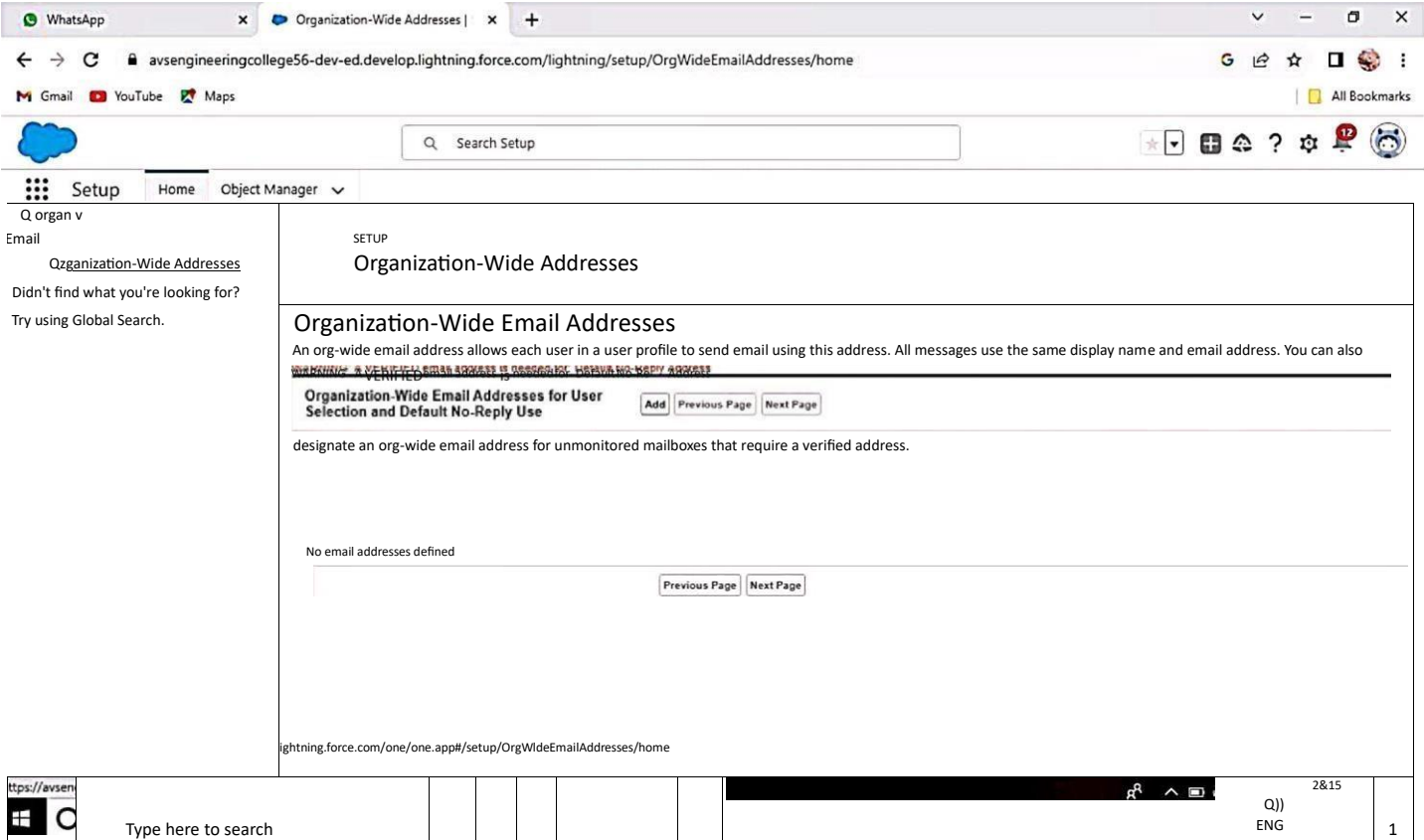
3.2 PROFI LE:



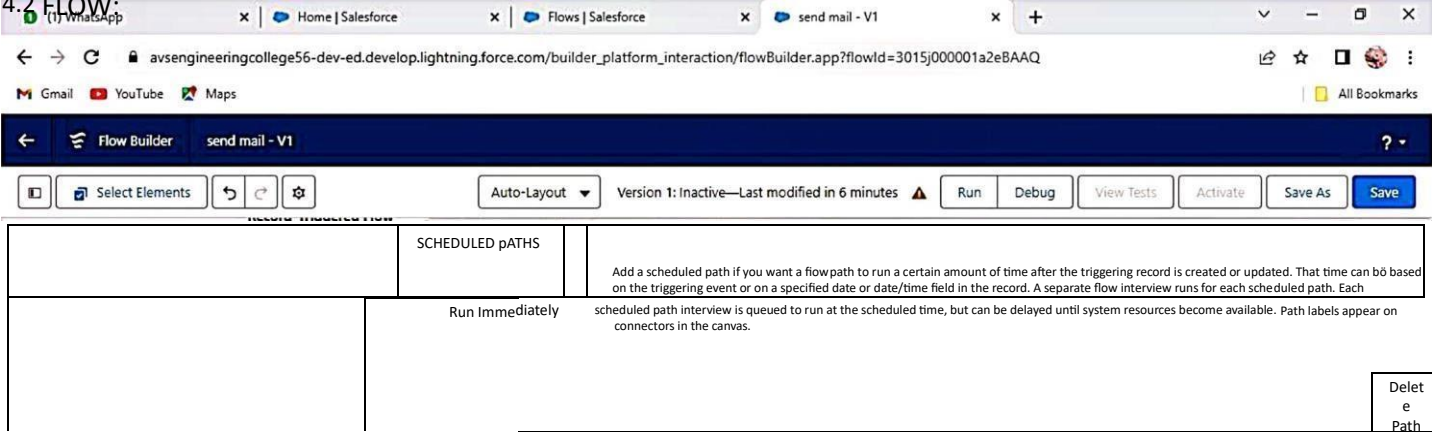
CHAPTER-4

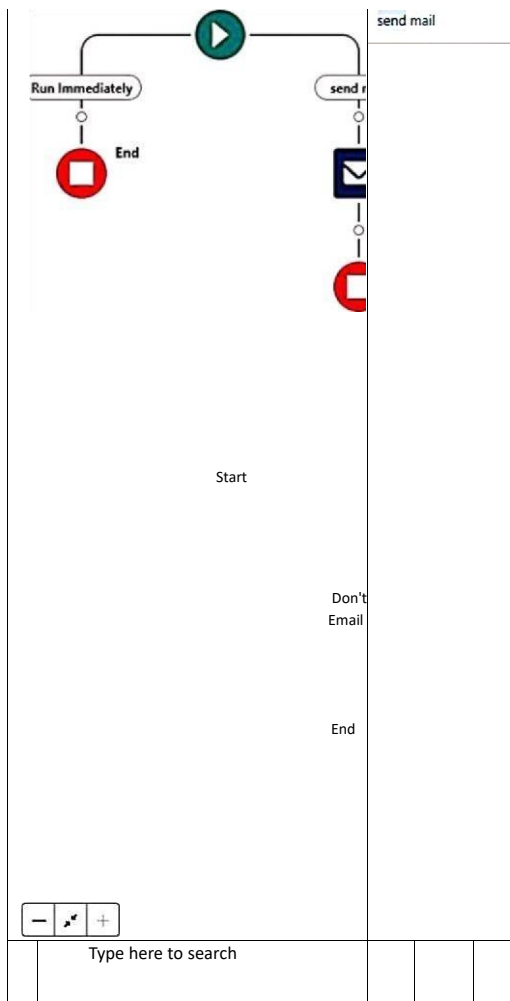
4.1 SETUP FOR OWD:

The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that provide a declarative, draganddrop design environment to build our business process logic.



4.2 FLOW:





SCHEDULED PATH DETAILS

Time Source

	Loan a:	Loan b:	Loan c:
Last Modified Date	07-26-2018	07-26-2018	07-26-2018

* Path Label

send mail

* API Name

send_mail

* Offset Number

24

* Offset Options ⓘ

Days Before

> Advanced

21:05

4.3 Final Views

Student

Recently Viewed | Students | Sal

Search...

School Management Schools Students Parents Reports Dashboards

CSI Higher Secondary School

New Contact Edit New Opportunity

Details

School Name

CSI Higher Secondary School

Address

Kottai, Csi block.

District

Salem

Phone Number

9384175463

School website

https://csi/salem

State

Tamil Nadu

Number of students

1

Highest Marks

10

Created By

VIGNESH S, 23/10/2023, 5:55 pm

Last Modified By

VIGNESH S, 23/10/2023, 7:04 pm

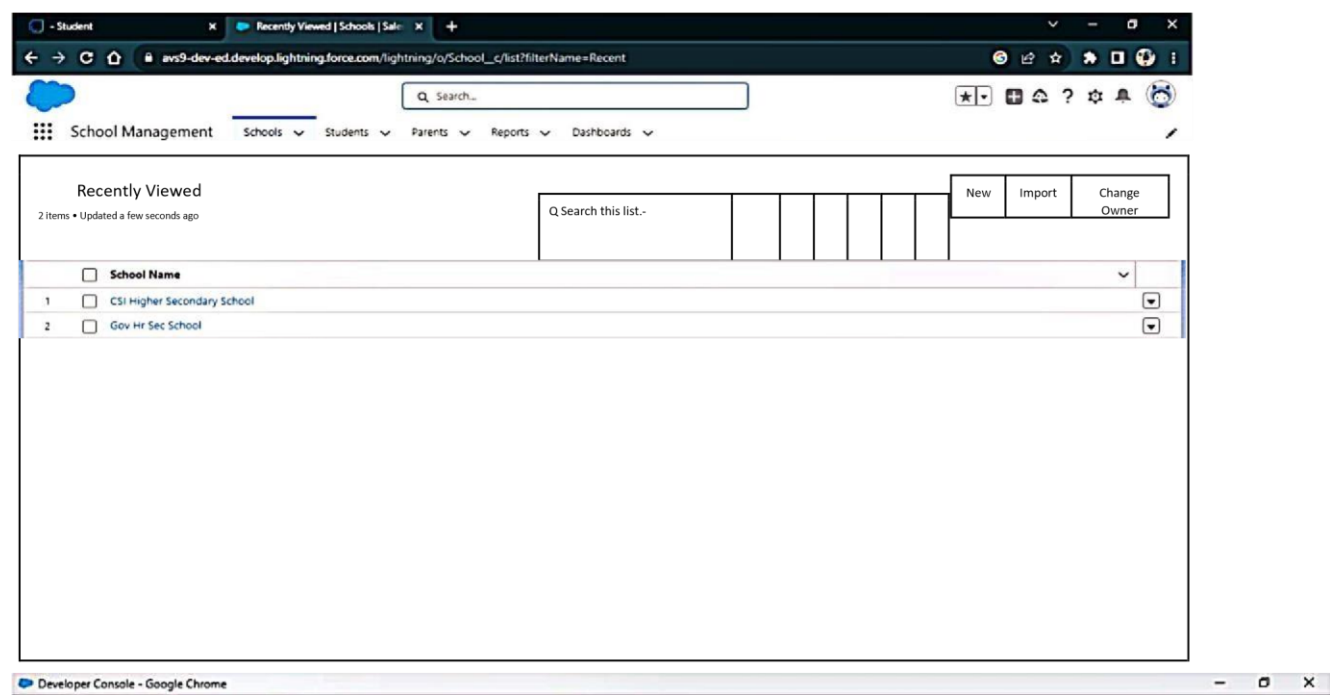
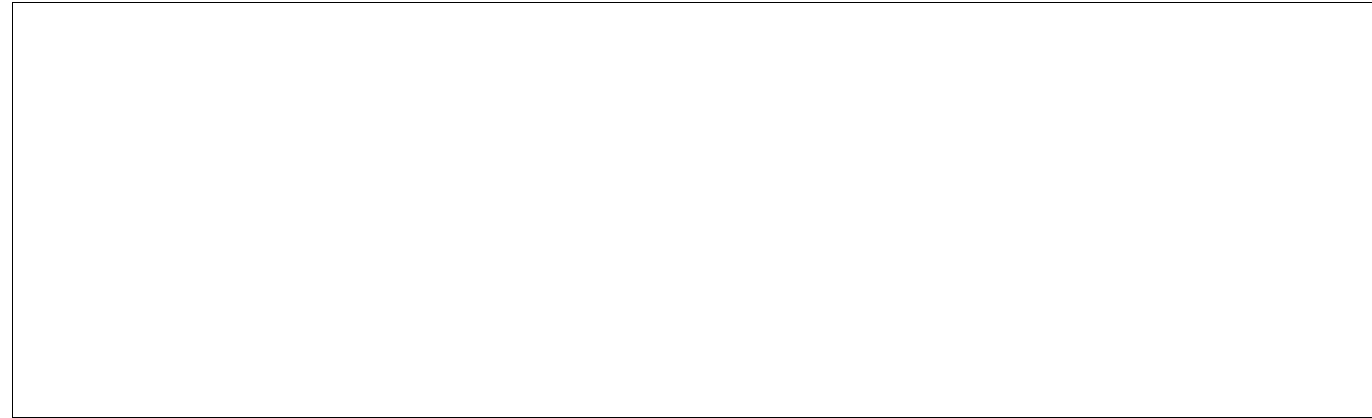
Students Recently Viewed

2 Items • Updated a few seconds ago

Search this list...

New Import

CJ Student Name	
Vignesh S	
Tamilvani s	



The image shows a Salesforce IDE window at the top and a Lightning web component below it.

IDE Window: The file is `propTrigger.apxt`. The code is as follows:

```

1 trigger propTrigger on Property__c (before update) {
2
3     if(trigger.isUpdate){
4
5         if(trigger.isBefore){
6
7 propClass.propMethod(trigger.new);
8
9         }
10    }
11
12 }
13

```

Lightning Web Component: The page title is "School Management". The breadcrumb is "School | Salesforc". The URL is `avs9-dev-ed.develop.lightning.force.com/lightning/r/School__c/a0D5j00000FXPmhEAH/view`. The page shows a "Related" section for "Students (1)".

Student Name
Vignesh S

Buttons: "New Contact", "Edit", "New Opportunity".

Developer Console - Google Chrome

Browser tabs: Subramani M | Parent | Salesforce, School | Salesforce, - Student

Address bar: avs9-dev-ed.develop.lightning.force.com/lightning/r/Parent__c/a0F5j00000h1qiMEAQ/view

Search bar: Search...

Navigation: School Management, Schools, Students, Parents, Reports, Dashboards

Parent: Subramani M

Buttons: New Contact, Edit, New Opportunity

Related Details

Parent Name	Subramani M	Owner	VIGNESH S
Parent Address	260/60, Muthugoundan St. Mannarpalayam.		
Parent Number	9003311125		
Created By	VIGNESH S, 23/10/2023, 5:59 pm	Last Modified By	VIGNESH S, 23/10/2023, 5:59 pm

File Edit Debug Test Workspace Help

propTrigger.apxt * propClass.apxt *

Code Coverage: None API Version: 59 Go To

```
4
5 public class propClass {
6
7     for(Property__c prop:propVar){
8
9         if (prop.Create_Property_Type__c== 'Residential'){
10
11             prop.Commercial__c='shop';
12
13         }else{
14
15
16
17         }
18
19     }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

Filter Click here to filter the log list

Type here to search

21:10 28-10-2023

CHAPTER-5

REPORTS & DASHBOARD

5.1 Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits.

The report builder provides a drag-and-drop interface to easily build and customize your reports.

(2) WhatsApp

O Reports I

Salesforce

M Cmail

YouTube

Maps

-52 C a avsenengineeringcollege56-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

All Bookmarks

Q Search„

Service Home Chatter Accounts Contacts v Cases v v Dashboards v colleges departments v providers v consumers v More v O

Reports

Recent

4 items

REPORTS Report Name V Recent New Properties

Report	Description	Folder	rts	Created By	v Created On
Total number of loan passed	5000S < =loan Amount	Private Repo	rts	V Bhuvaneswari Shanmugam	27/10/2023, 4:23 pm V Subscribed
Created by Me for getting Private Reports	Which flows run, what's	Private Reports		Bhuvaneswari Shanmugam	26/10/2023, 7:45 pm
New Accounts Report				Bhuvaneswari Shanmugam	26/10/2023, 7:40 pm
Public Reports the interview, and how lonstatus h g e Sample Flow Report: Screen All Reports Flows the screens?	Public Report of do users take to complet	eac s		Automated Process	17/10/2023, 10:54 am

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

2&57

Type here to search

QJ) ENG 282023-10 1

3

CHAPTER-6 CONCLUSION

the conclusion of a property management application using Salesforce project would summarize achievements, highlight benefits like improved efficiency, address challenges and solutions, include user feedback, mention lessons learned, discuss future enhancements, acknowledge contributions, and emphasize the project's significance in enhancing property management processes.

In building an employee travel approval application, it's essential to engage relevant stakeholders, including HR, finance, and IT teams, to ensure that the application aligns with organizational goals and requirements. Furthermore, thorough testing and training should be conducted to guarantee a smooth and successful implementation.

By addressing these key points and creating a tailored school management application that aligns with the unique needs and policies of the corporate, organizations can enhance their travel management processes, improve cost control, and provide a more satisfying experience for employees and travel administrators alike.

CHAPTER-7

PROJECT DEMONSTRATION

Github:

<https://github.com/Harish6379/Naanmudhalvan-salesforce-NM2023TMID01395-kiot> Demo

Link: https://drive.google.com/file/d/1hbA9Fp4ibHZgm1_tXGoPAczh2Y8vlz7/view?usp=drivesdk