



PROPERTY MANAGEMENT APPLICATION

1. INTRODUCTION

1.1 Overview

To develop an application for property management which provides discounts and loans to buyers. To know the count of loan passed create a reports on dashboard.

1.2 Purpose

We can able to sell, service, market, analyze, and connect with our customers from anywhere. Using standard products and features, we can manage relationships with prospects and customers, collaborate and engage with employees and partners and store our data securely in the cloud.

1. Problem Definition & Design Thinking

2.1 Empathy Map

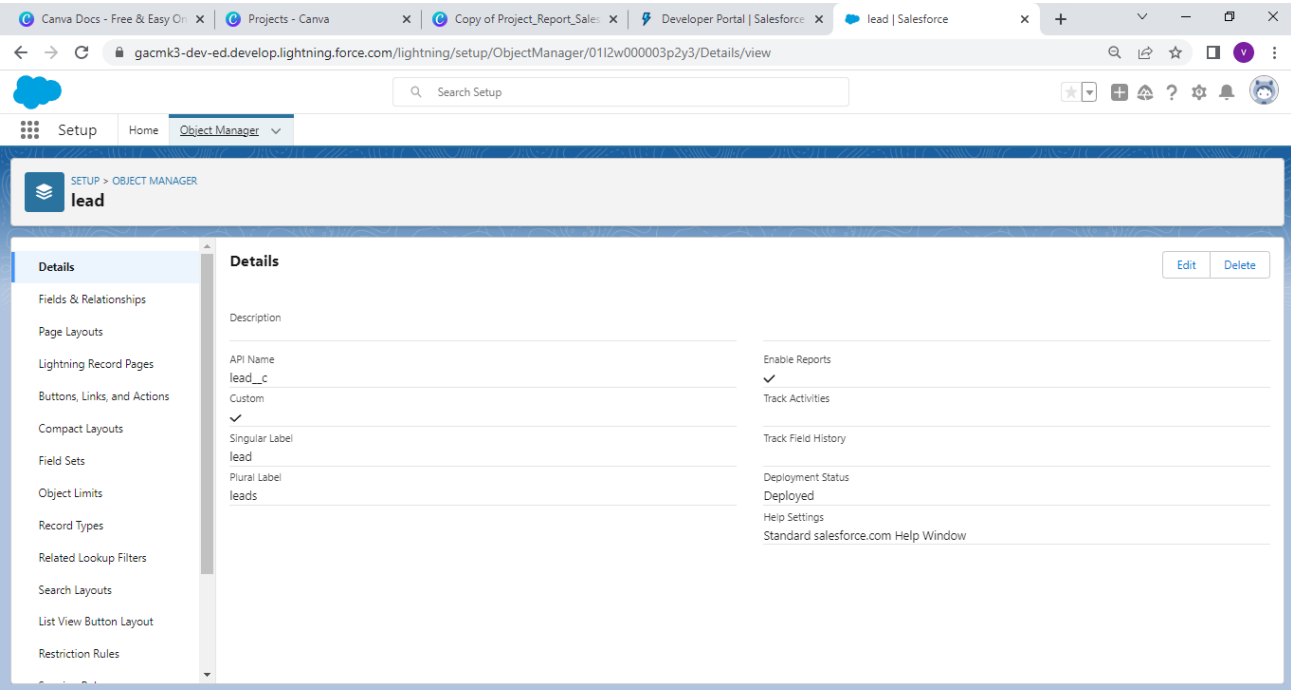
3.1 Data Model:

OBJECT NAME	FIELD AND FIELD LABEL IN THE OBJECT	DATA TYPE
Lead	1.City 2.Email 3.Phone	1.Picklist 2.Email 3.phone
Buy	1.Discount 2.Property type 3.State	1.Percentage 2.Picklist 3.Picklist
Rent	1.Rent 2.Rental city 3.BHK type	1.Auto number 2.Text 3.Picklist
Loan	1.Interest rate 2.Annual loan 3.Loan amount	1.Currency 2.Number 3.Formula

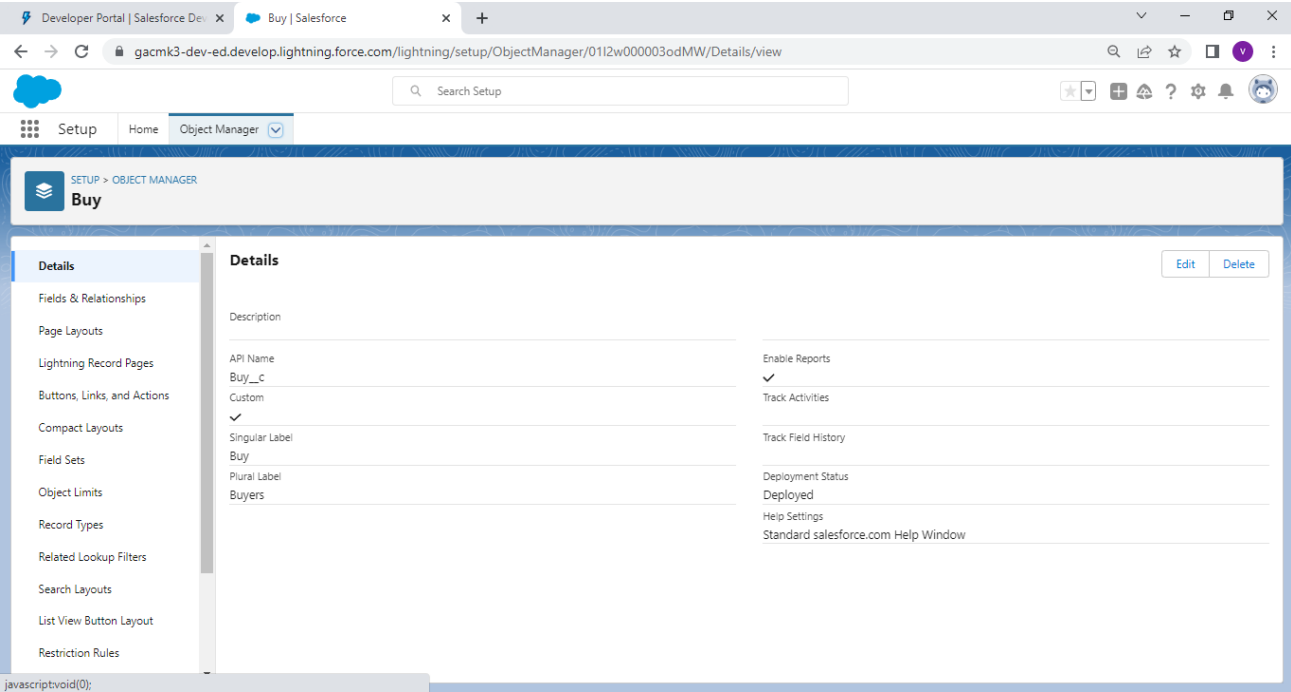
3.2 Activity & Screenshot

Milestone:02

Activity: 01- To create an object Lead



Activity: 02- To Create an object Buy.



Activity:03 To create an object Loan.

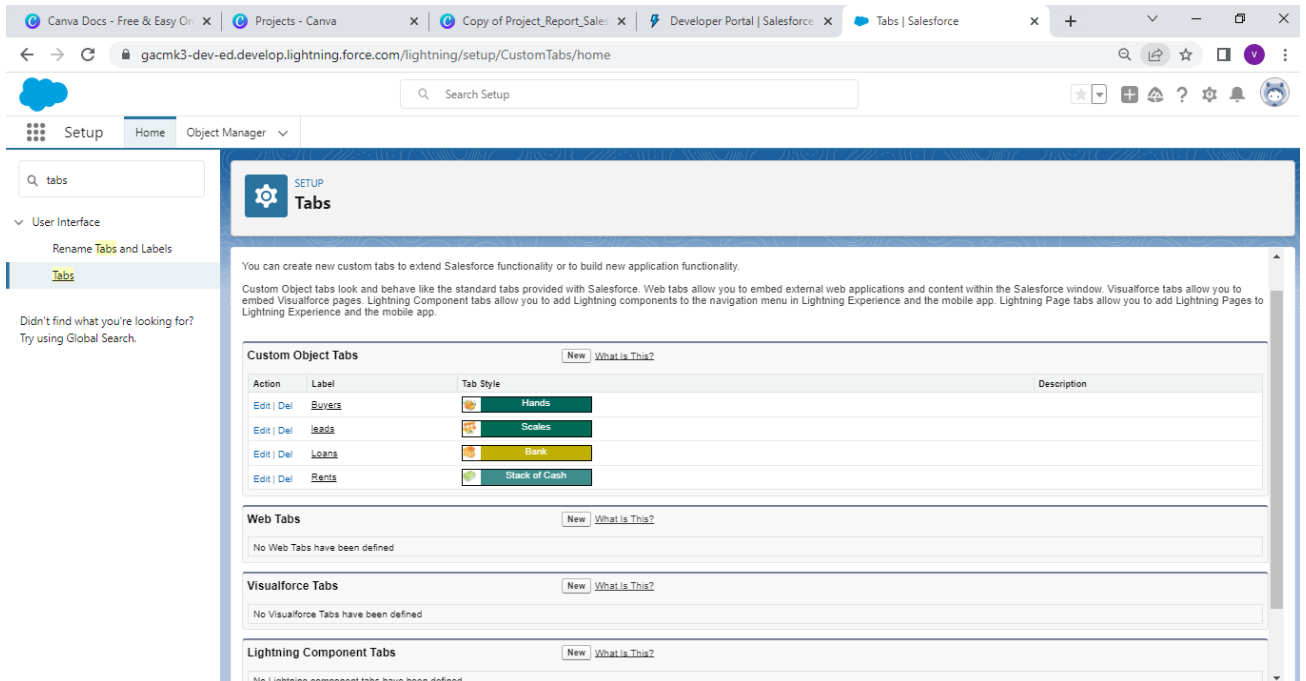
The screenshot shows the Salesforce Setup interface for the 'Loan' object. The browser tabs include 'Canva Docs', 'Projects - Canva', 'Copy of Project_Report_Sale', 'Developer Portal | Salesforce', and 'Loan | Salesforce'. The URL is 'gacmk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003odNP/Details/view'. The 'Object Manager' tab is selected in the top navigation bar. The left sidebar shows the 'Details' section expanded, with sub-items like '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', and 'Restriction Rules'. The main content area displays the 'Details' for the 'Loan' object, including fields like 'API Name' (Loan__c), 'Singular Label' (Loan), 'Plural Label' (Loans), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are visible in the top right corner.

Activity:04-To create an object Rent.

The screenshot shows the Salesforce Setup interface for the 'Rent' object. The browser tabs include 'Canva Docs', 'Projects - Canva', 'Copy of Project_Report_Sale', 'Developer Portal | Salesforce', and 'Rent | Salesforce'. The URL is 'gacmk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003odN5/Details/view'. The 'Object Manager' tab is selected in the top navigation bar. The left sidebar shows the 'Details' section expanded, with sub-items like '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', and 'Restriction Rules'. The main content area displays the 'Details' for the 'Rent' object, including fields like 'API Name' (Rent__c), 'Singular Label' (Rent), 'Plural Label' (Rents), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are visible in the top right corner.

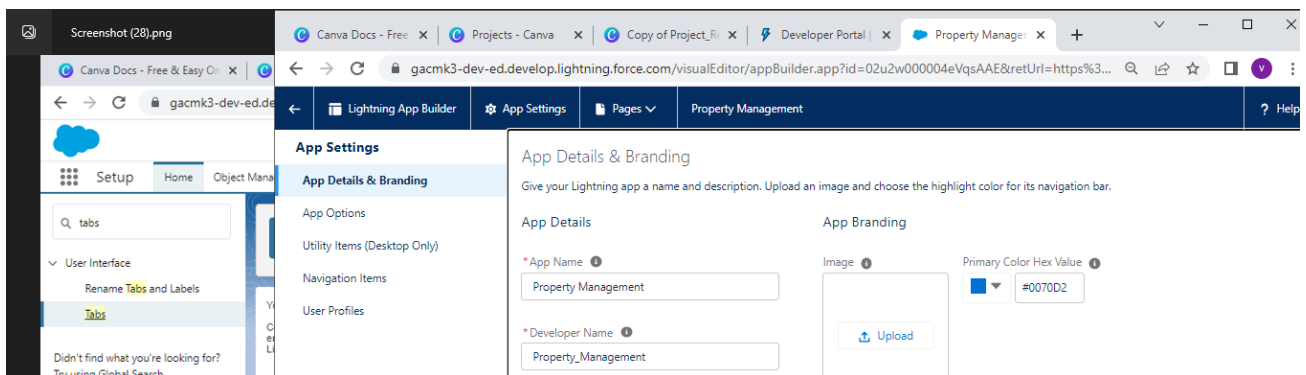
Milestone:03-Tab

Activity:To create a tab for Lead,Buy,Rent,Loan.



Milestone:04-The Lightning app

Activity:01-To create the lightning app



Description ⓘ

Enter a description...

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

PM

Property Management

Milestone:05-Fields

Activity:01-To create Lead field

Canva Docs - Free & E...Projects - CanvaCopy of Project_Repor...Property Management...Developer Portal | Sal...lead | Salesforce

gacmk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p2y3/FieldsAndRelationships/editDependency?controller=00N2w00000...

Search Setup

SetupHomeObject Manager

lead

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

SaveCancelPreview

Controlling Field leadDependent Field state

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend

Excluded ValueIncluded Value

Click button to include or exclude selected values from the dependent picklist:

Include ValuesExclude Values

Showing Columns: 1 - 1 (of 1) < Previous | Next > | View All

Go to Column:

lead:	L-000001
state:	Maharashtra
	Gujarat
	Rajasthan

Showing Columns: 1 - 1 (of 1) < Previous | Next > | View All

Click button to include or exclude selected values from the dependent picklist:

Include ValuesExclude Values

SaveCancelPreview

Activity:02-To create Buy field

Canva Docs - Free & E...Projects - CanvaCopy of Project_Repor...Property Management...Developer Portal | Sal...Buy | Salesforce

gacmk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003odMW/FieldsAndRelationships/editDependency?controller=00N2w000...

Search Setup

SetupHomeObject Manager

Buy

SaveCancelPreview

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

SAVE | CANCEL | PREVIEW

Controlling FieldProperty type
Dependent FieldState

▼ Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend

Excluded Value

Included Value

Click button to include or exclude selected values from the dependent picklist:

Include ValuesExclude Values

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All Go to

Property type:	Residential	Commercial	Industrial
State:	Maharashtra	Maharashtra	Maharashtra
	Gujarat	Gujarat	Gujarat
	Rajasthan	Rajasthan	Rajasthan

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

Include ValuesExclude Values

Save | Cancel | Preview

Activity:03-To create Rent field

Canva Docs - Free & E... | Projects - Canva | Copy of Project_Repo... | Property Management... | Developer Portal | Salesforce | Rent | Salesforce

gacmk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w00003odN5/FieldsAndRelationships/editDependency?controller=00N2w0000...

Search Setup

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Rent

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

SAVE | CANCEL | PREVIEW

Controlling FieldRent
Dependent FieldBHK type

▼ Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend

Excluded Value

Included Value

Click button to include or exclude selected values from the dependent picklist:

Include ValuesExclude Values

Showing Columns: 1 - 1 (of 1) < Previous | Next > View All Go to

Rent:	R.(0000)
BHK type:	1BHK
	2BHK
	3BHK

Showing Columns: 1 - 1 (of 1) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

Include ValuesExclude Values

Save | Cancel | Preview

Milestone:06-Profiles

Activity: To create a new profile

Screenshot of the Salesforce Setup page showing the Profiles section. The page title is "Profiles". The left sidebar shows the navigation menu with "Profiles" selected. The main content area displays a table of profiles with columns: Action, Profile Name, User License, and Custom. The table lists various profiles including Marketing executive 1, Marketing executive 2, Sales REP 1, Sales REP 2, Sales REP 3, Read Only, Custom: Sales Profile, Custom: Marketing Profile, Custom: Support Profile, Salesforce API Only System Integrations, System Administrator, Chatter Free User, Analytics Cloud Integration User, and Analytics Cloud Security User. The table is paginated, showing 1-25 of 40 profiles.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Marketing executive 1	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Marketing executive 2	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Sales REP 1	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Sales REP 2	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Sales REP 3	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>

Milestone:07-New user

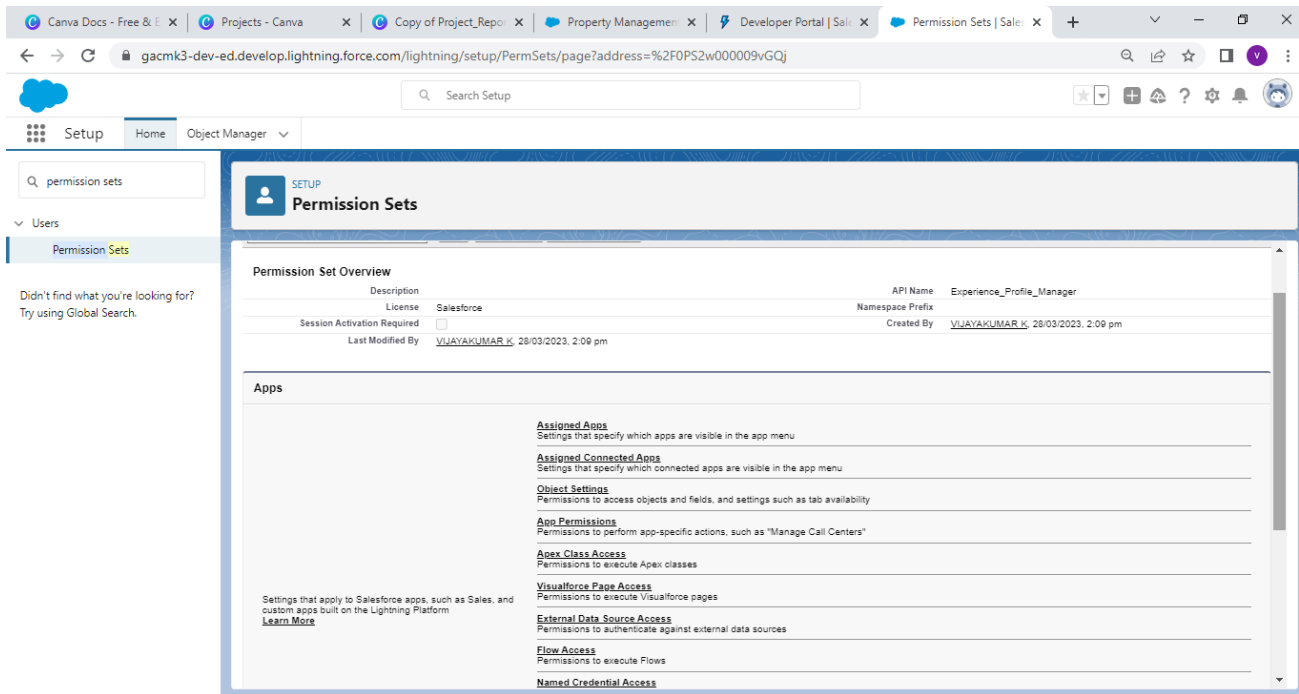
Activity:To create a user

Screenshot of the Salesforce Setup page showing the Users section. The page title is "Users". The left sidebar shows the navigation menu with "Users" selected. The main content area displays the "User Edit" form for a user named "Vijayakumar K". The form includes fields for General Information (First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division) and Role (Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts). The form is paginated, showing 1-25 of 40 users.

Field	Value
First Name	Vijayakumar
Last Name	K
Alias	VK
Email	vijayakumark7@gmail.com
Username	vijayakumark7@gmail.com
Nickname	User168123631274286998
Title	
Company	GACMK
Department	Deloping
Division	
Role	<None Specified>
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	--None--
Data.com Monthly Addition Limit	300
Accessibility Mode (Classic Only)	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>

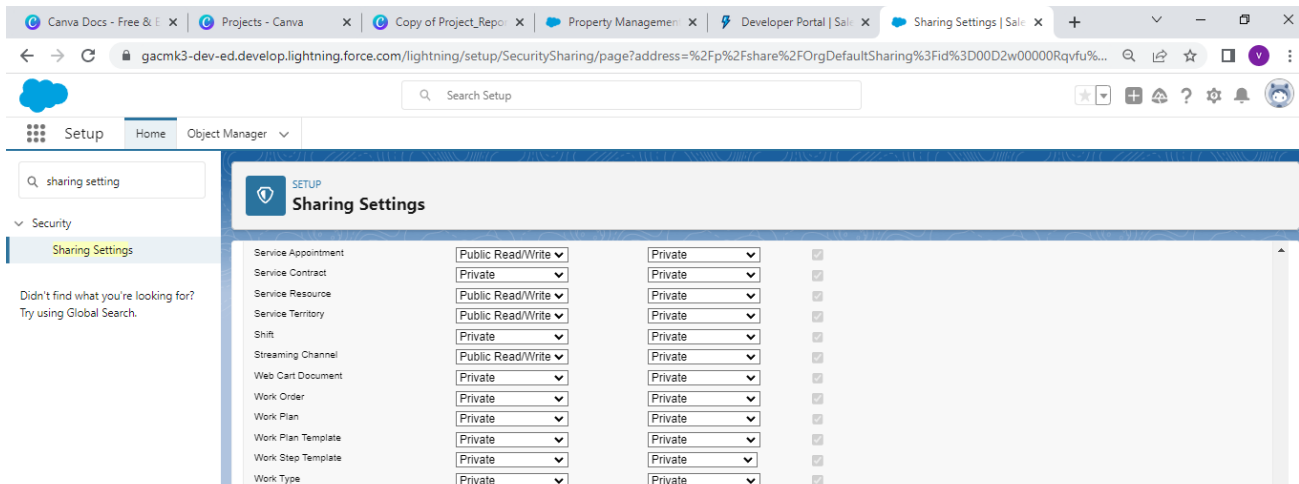
Milestone:08-Permission set

Activity:Create a permission set



Milestone:09-Setup for OWD

Activity:Create OWD setting



Work Type Group	<div>Public Read/Write</div>	<div>Private</div>	<div></div>
lead	<div>Private</div>	<div>Private</div>	<div></div>
Loan	<div>Public Read Only</div>	<div>Public Read Only</div>	<div></div>
Rent	<div>Private</div>	<div>Private</div>	<div></div>
Other Settings			
Standard Report Visibility <div></div>		Manual User Record Sharing <div></div>	Manager Groups <div></div>
		Secure guest user record access <div></div>	Require permission to view record names in lookup fields <div></div>
<div>Save</div> <div>Cancel</div>			

Milestone:10-Report

Activity:To create a Report

Canva Docs - Free & E...Projects - CanvaCopy of Project_ReportProperty ManagementDeveloper Portal | SalesNew Accounts Report

gacmk3-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000E9T vzEAF/view?queryScope=userFolders

Search...

MarketingHomeChatterCampaignsLeadsContactsOpportunitiesReportsDashboardsleadsBuyersRentsLoans

Report: Accounts

New Accounts Report

Enable Field Editing

Add Chart

Edit

Total Records
13

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	VIJAYAKUMAR K	United Oil & Gas, UK	UK	Customer - Direct	-	28/03/2023
2	-	VIJAYAKUMAR K	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	28/03/2023
3	-	VIJAYAKUMAR K	Edge Communications	TX	Customer - Direct	Hot	28/03/2023
4	-	VIJAYAKUMAR K	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	28/03/2023
5	-	VIJAYAKUMAR K	Pyramid Construction Inc.	-	Customer - Channel	-	28/03/2023
6	-	VIJAYAKUMAR K	Dickenson plc	KS	Customer - Channel	-	28/03/2023
7	-	VIJAYAKUMAR K	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	28/03/2023
8	-	VIJAYAKUMAR K	Express Logistics and Transport	OR	Customer - Channel	Cold	28/03/2023
9	-	VIJAYAKUMAR K	University of Arizona	AZ	Customer - Direct	Warm	28/03/2023
10	-	VIJAYAKUMAR K	United Oil & Gas Corp.	NY	Customer - Direct	Hot	28/03/2023
11	-	VIJAYAKUMAR K	sForce	CA	-	-	28/03/2023
12	-	Automated Process	Sample Account for Entitlements	-	-	-	28/03/2023
13	-	VIJAYAKUMAR K	GenePoint	CA	Customer - Channel	Cold	28/03/2023

Milestone:11-Dashboards

Activity:Create a dashboard



1. ADVANTAGES & DISADVANTAGE

Advantages:

1. Online payments
2. Advertising and Marketing
3. Financial management
4. Tenant application and screening
5. Contact management

Disadvantages:

1. Time consuming if you choose wrong system....
2. Might seem expensive for small business....
3. Training (cost and time)

1. APPLICATIONS

1. Reservation
2. Channel management
3. House keeping

1. CONCLUSION

The customer relationship management has simplified the handling of customer in many industries.

1. FUTURE SCOPE

It enables in decreased demand in luxury segment and revenue and activity within industry. Now a day's hotel is providing many other facilities .

Enhancements that can be made in the future.

1.

1.

1.

1.

1.

1.

1.

