PROJECT REPORT TEMPLATE

1 INTRODUCTION

1.1 OVERVIEW

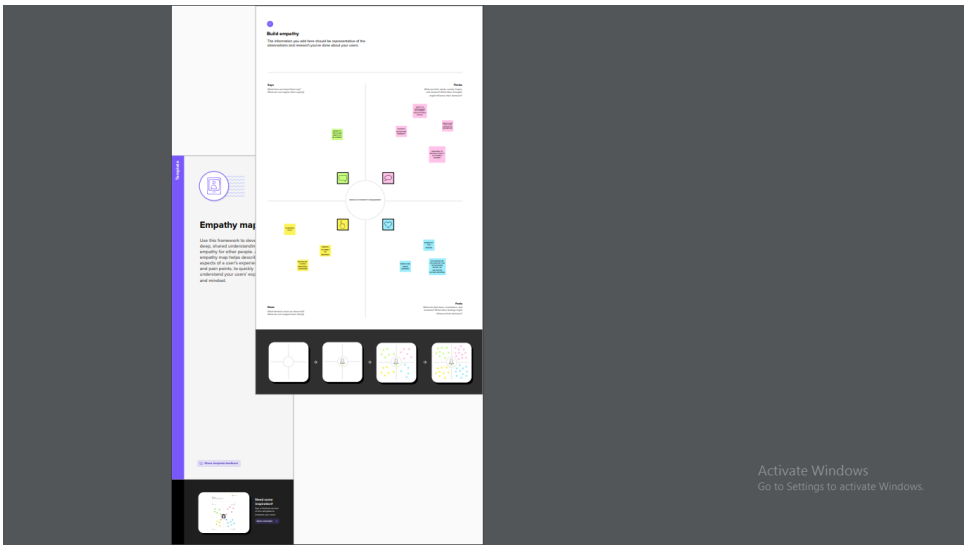
Develop an app for the property management where buyer can order his requirements and get the appropriate details of the property.According to his interest just provide him with some discounts upto what extent he can get the discount .Also track whether he is interested in taking the loan available for 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.

1.2 PURPOSE

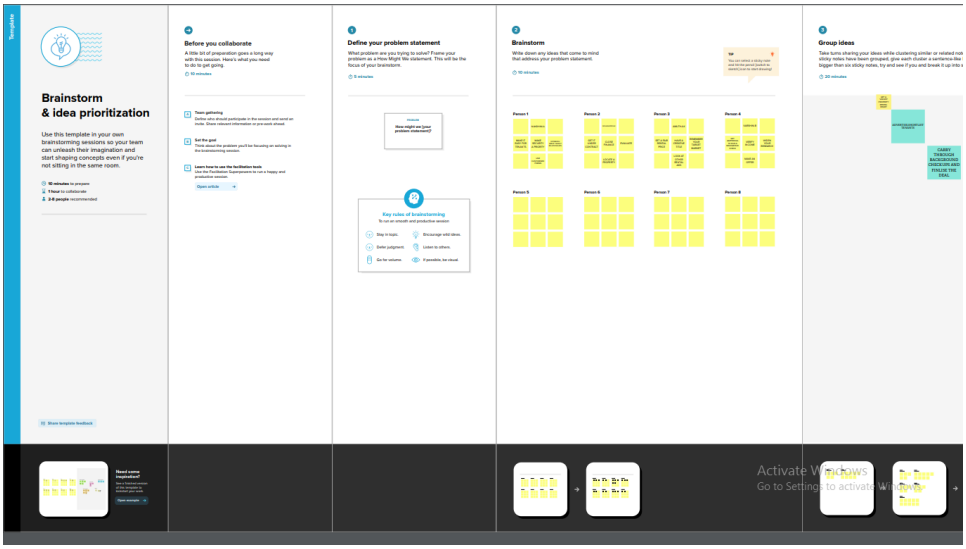
Running and maintaining a real estate property can be challenging for any commercial or residential property manager.Whether you rent one or multiple properties,dedicated property management software (PMS) can help you streamline your rental operations.Software solutions that can keep track of tenant information have been around for a long time ,but an increased focus on analytics and reducing overhead costs is making even reluctant property owners reconsider their decision to go digital

2 PROBLEM DEFINITION&DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION & BRAINSTORMING MAP



3 RESULT

3.1 DATA MODEL:

OBJECT NAME	FIELD IN THE OBJECT

LEAD

BUY

FIELD LABEL	DATA TYPE
State	Picklist
City	Picklist
Email	Email
Phone	phone
Property type	Picklist
Discount	

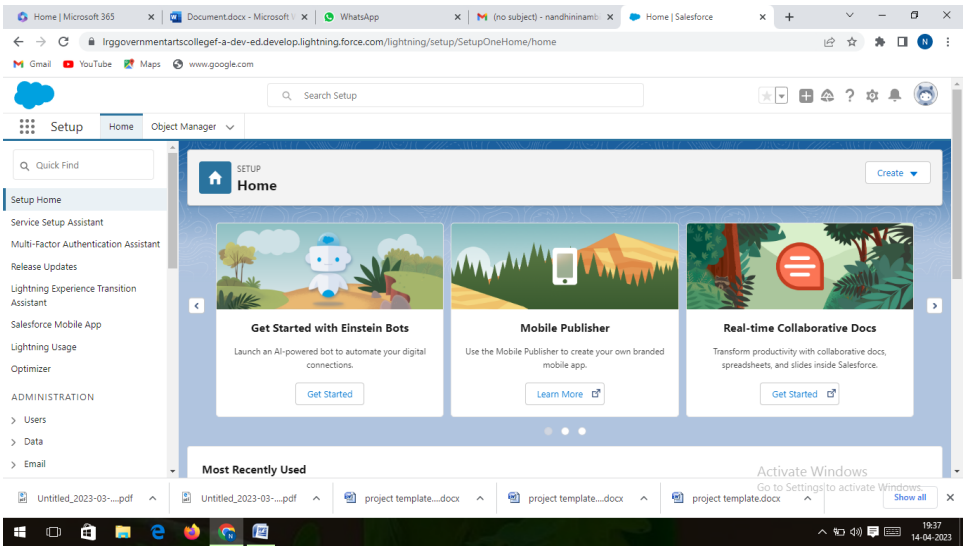
RENT	State City Rent Rental city BHK	Percentage Picklist Picklist Auto number Text
LOAN		

	Loan id Interest rate Term Annual loan Total loan installments	Picklist Auto number Currency Number Number

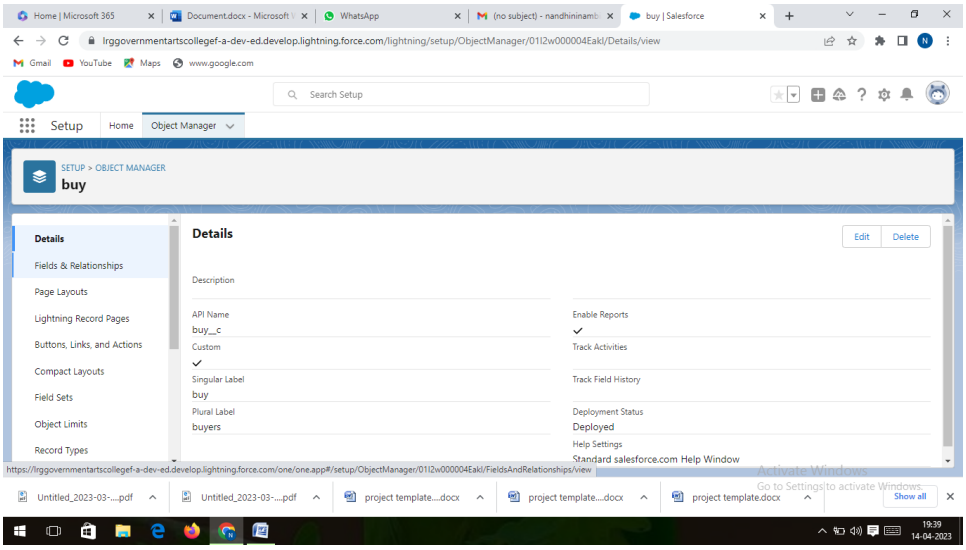
BANK	Loan repayment Loan amount Premium amount Interest rate	Number number formula Master field

		relationship Master field relationship

SALESFORCE HOMEPAGE



OBJECT: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Home
Object Manager
SETUP > OBJECT MANAGER
buy
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
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Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
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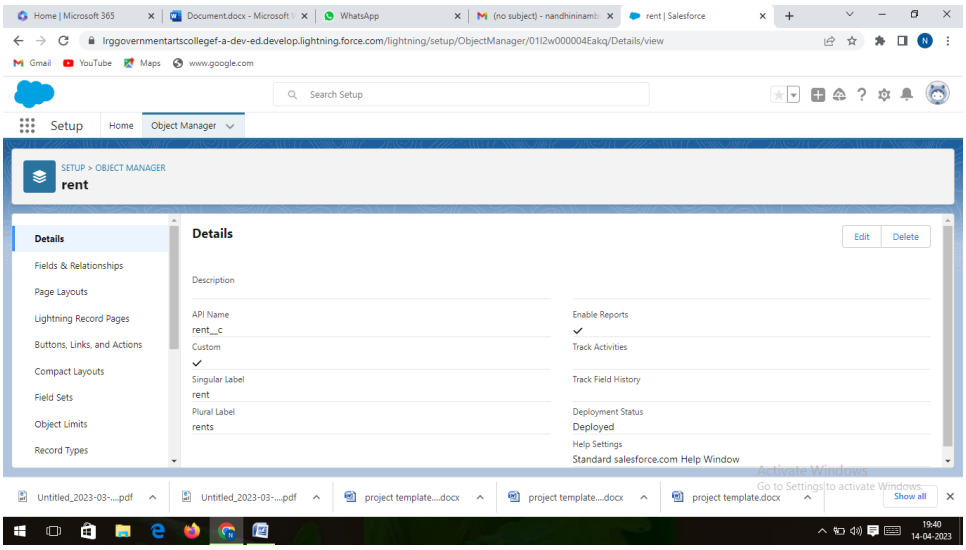
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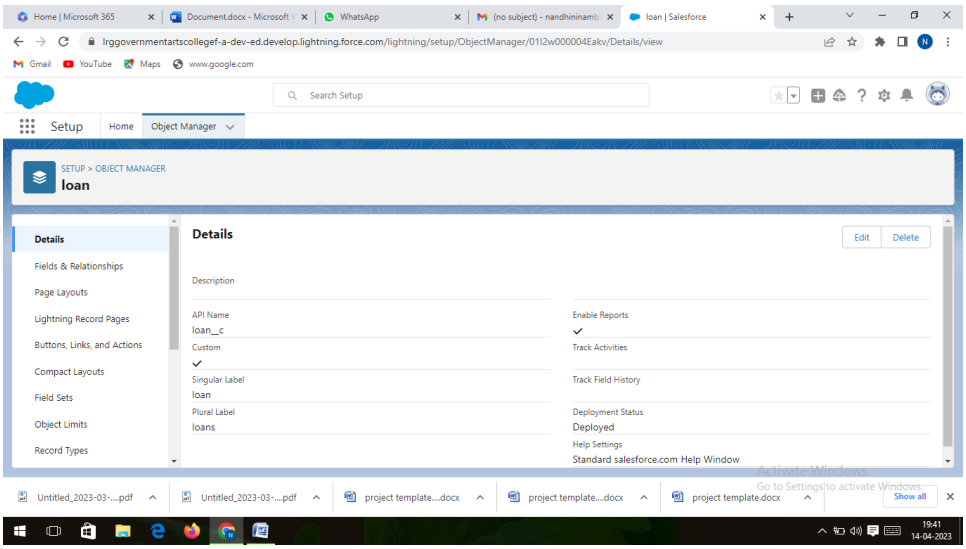
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loan | Salesforce
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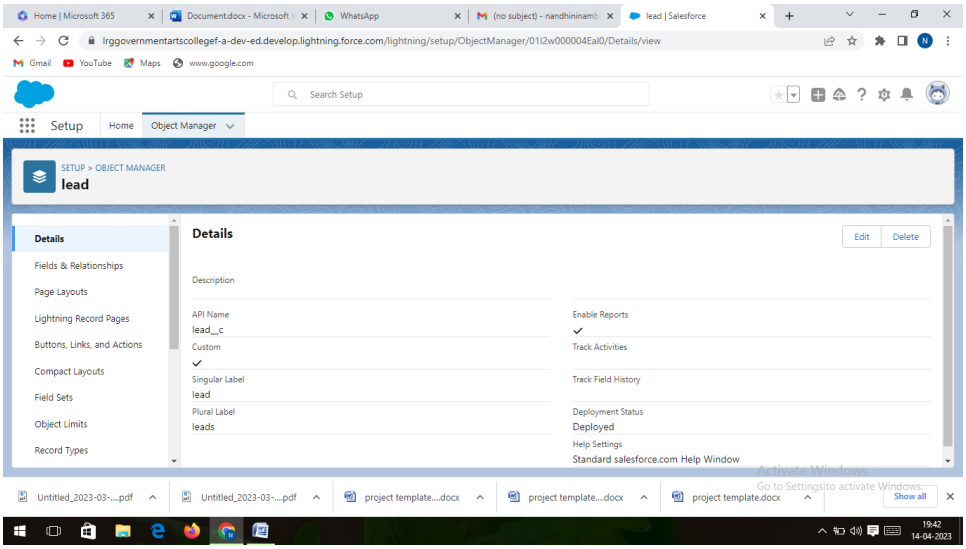
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lead | Salesforce
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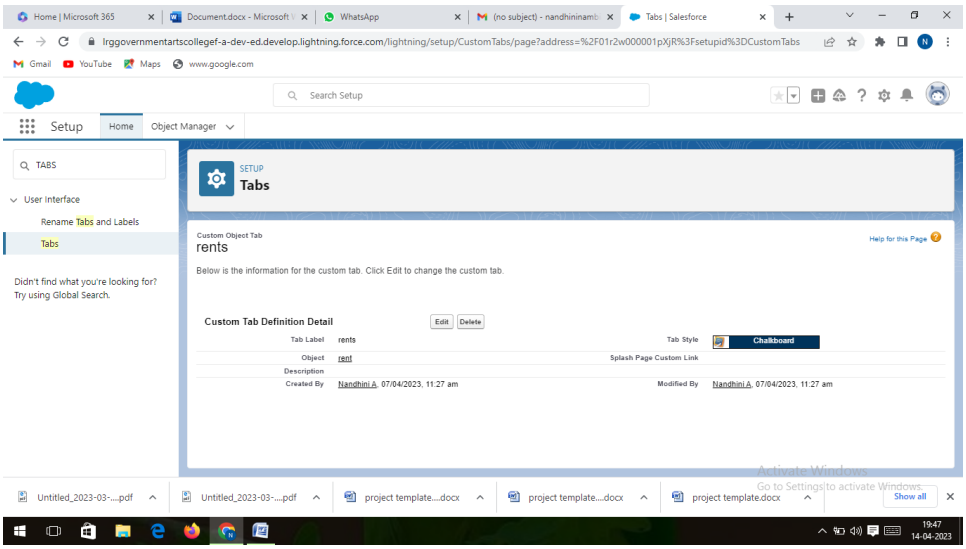
Tabs | Salesforce
Setup
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TABS
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Rename Tabs and Labels
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Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Object Tab
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Help for this Page
Below is the information for the custom tab. Click Edit to change the custom tab.
Custom Tab Definition Detail
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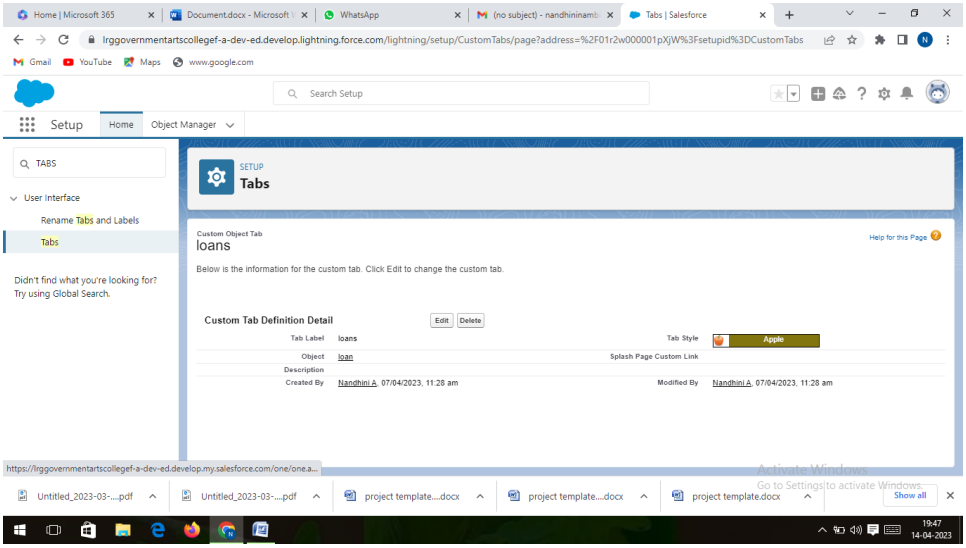
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Setup
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Object Manager
TABS
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
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SETUP
Tabs
Custom Object Tab
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Help for this Page
Below is the information for the custom tab. Click Edit to change the custom tab.
Custom Tab Definition Detail
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Tab Style
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Modified By
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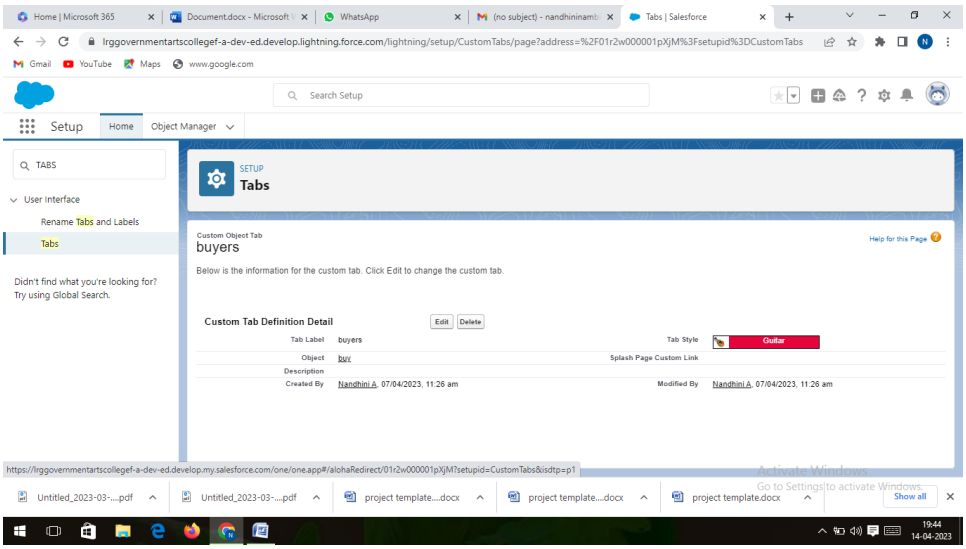
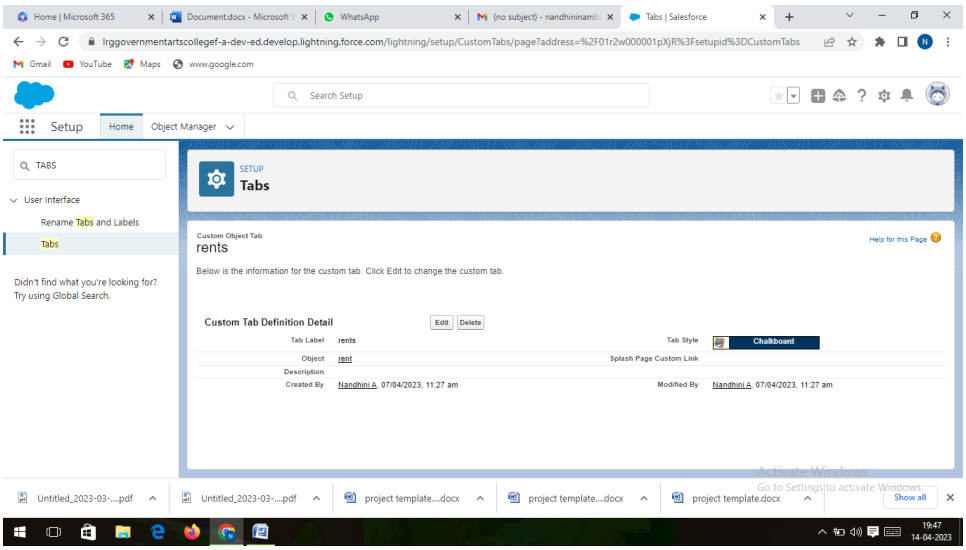
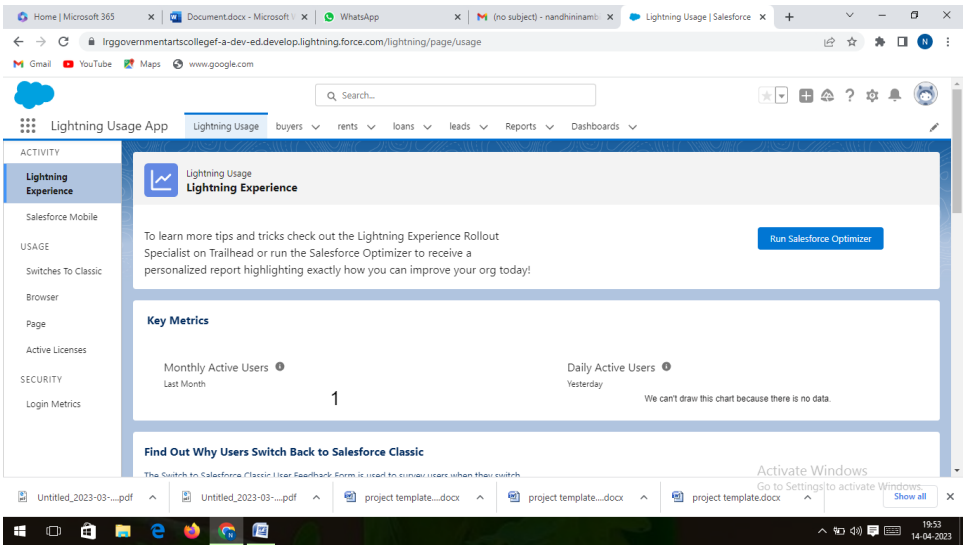




LIGHTNING APP:


Lightning Usage App
Lightning Usage
buyers
rents
loans
leads
Reports
Dashboards
ACTIVITY
Lightning Experience
Salesforce Mobile
USAGE
Switches To Classic
Browser
Page
Active Licenses
SECURITY
Login Metrics
Lightning Usage
Lightning Experience
To learn more tips and tricks check out the Lightning Experience Rollout Specialist on Trailhead or run the Salesforce Optimizer to receive a personalized report highlighting exactly how you can improve your org today!
Run Salesforce Optimizer
Key Metrics
Monthly Active Users
Last Month
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Daily Active Users
Yesterday
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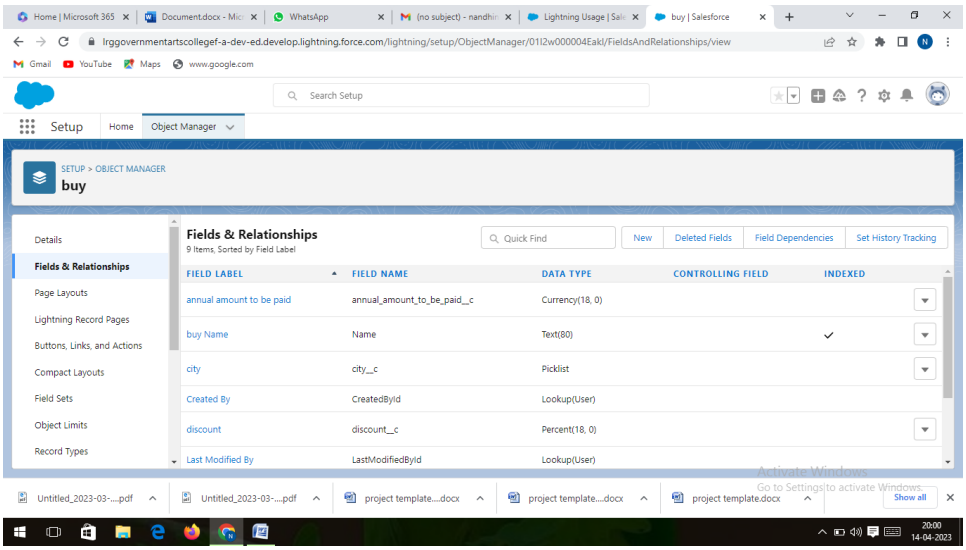
Find Out Why Users Switch Back to Salesforce Classic

FIELDS: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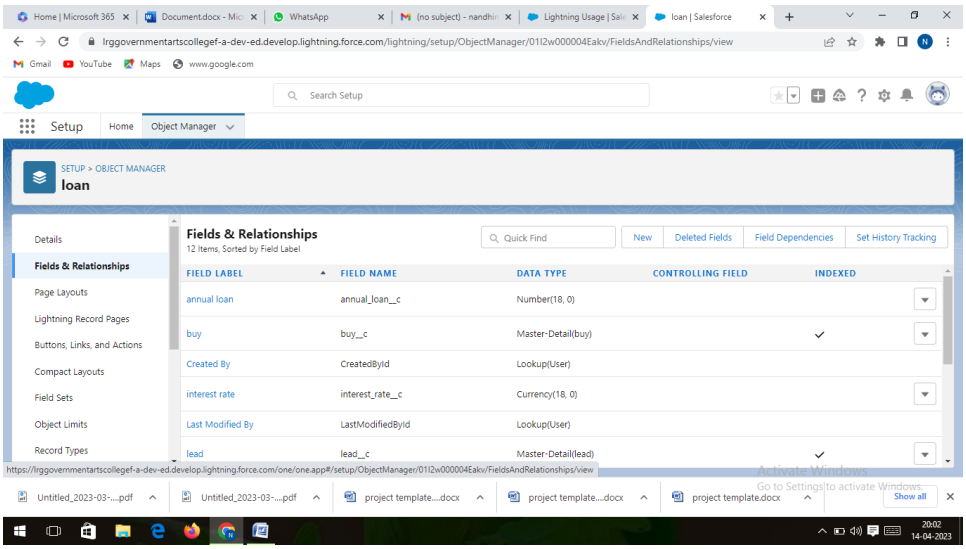
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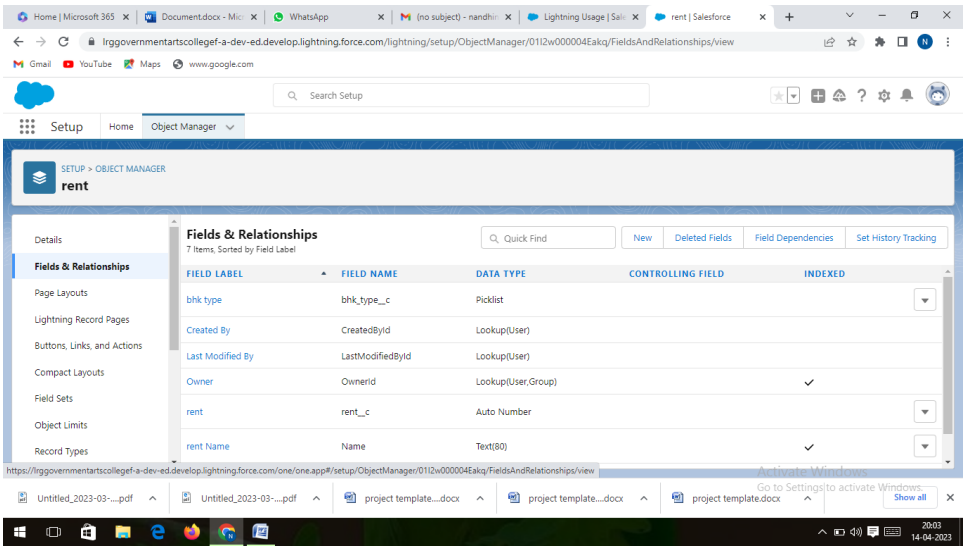
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Record Types
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FIELD NAME
DATA TYPE
CONTROLLING FIELD
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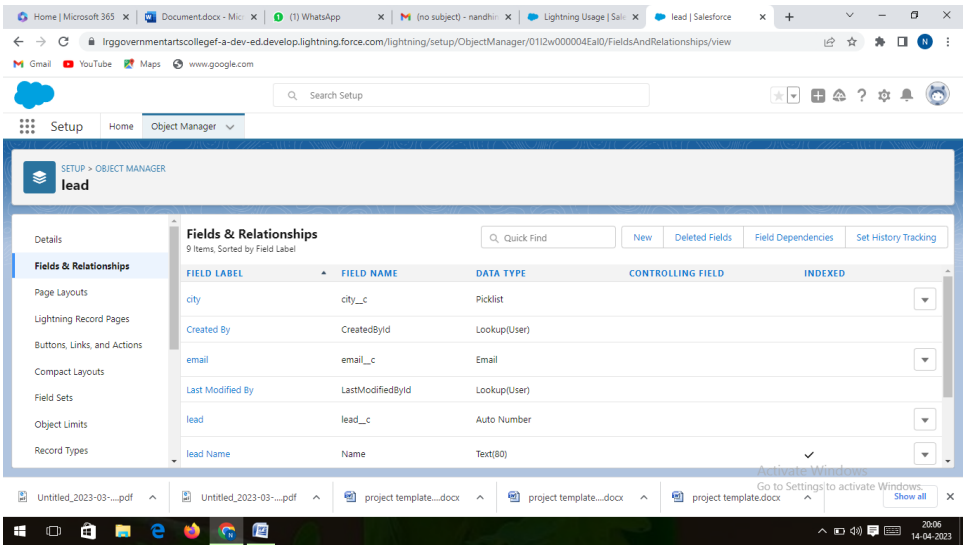
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Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
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Object Limits
Record Types
Fields & Relationships
9 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
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city__c
Picklist
Created By
CreatedById
Lookup(User)
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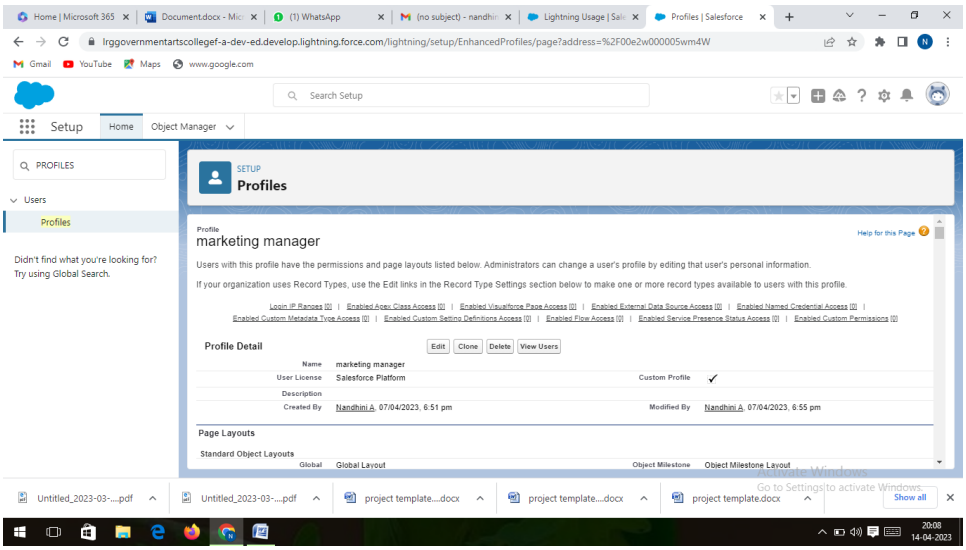
PROFILES:


Setup
Home
Object Manager
PROFILES
Users
Profiles
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SETUP
Profiles
Profile
marketing manager
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Profile Detail
Edit
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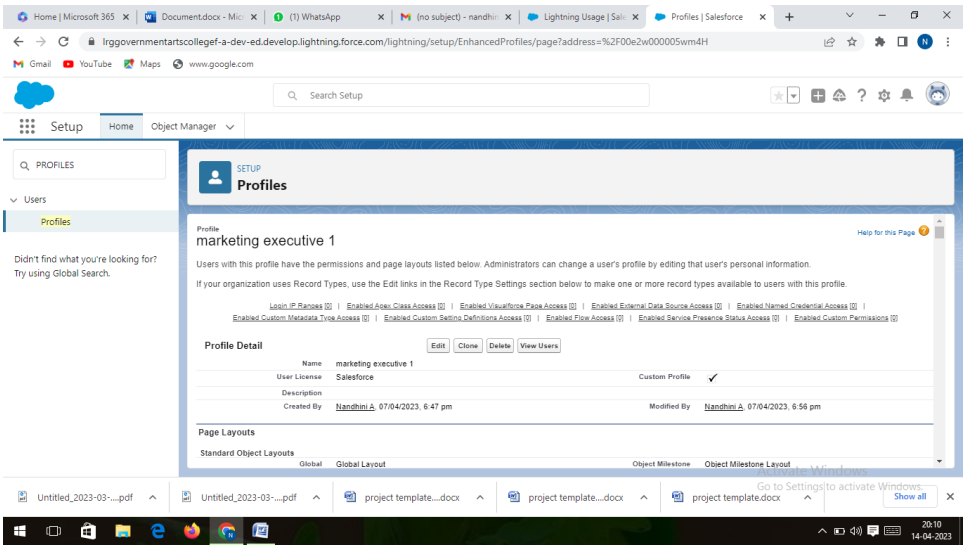
Object Milestone Layout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Search Setup
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SETUP
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Profile
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Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] |
Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]
Profile Detail
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User License
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Nandhini A, 07/04/2023, 6:56 pm
Page Layouts
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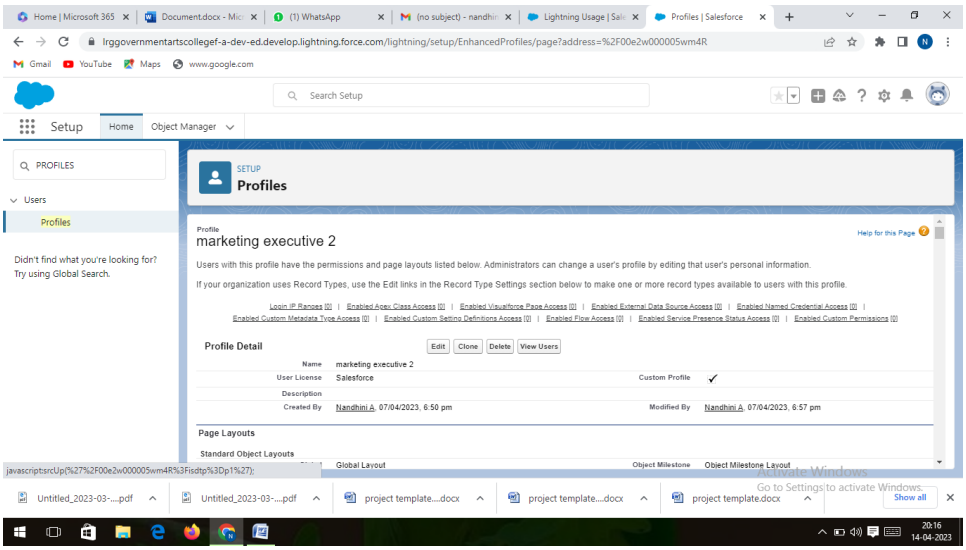
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If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
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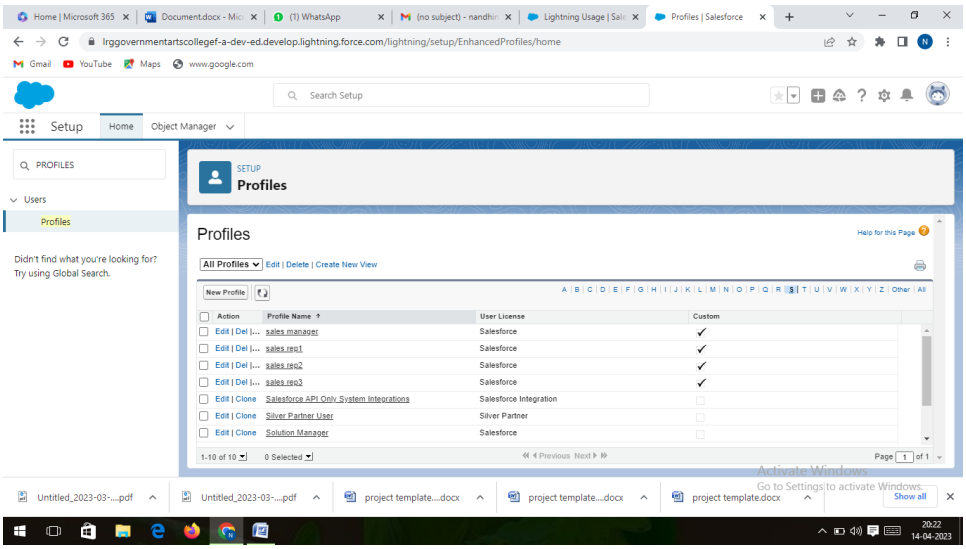
Profiles | Salesforce
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Setup
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SETUP
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1-10 of 10
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Page 1 of 1
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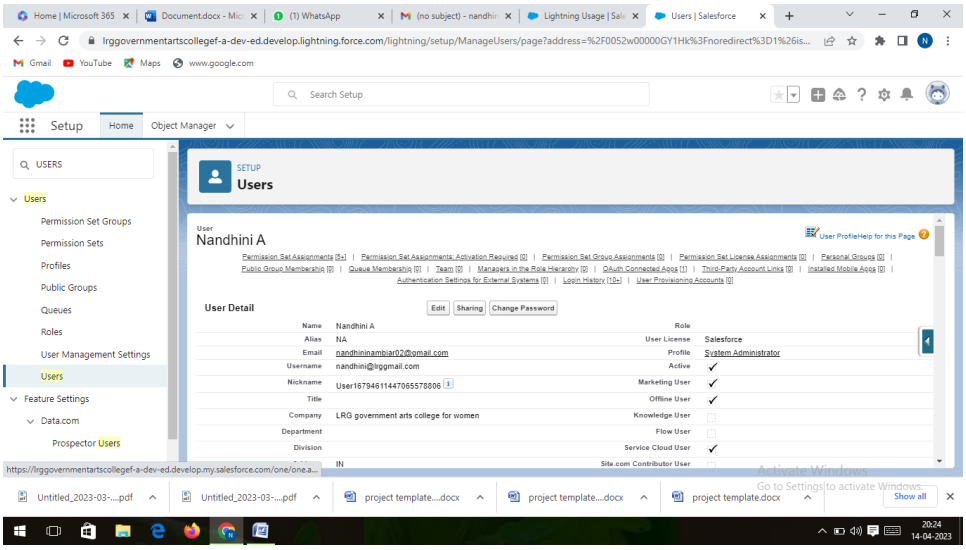
NEW USERS: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Home
Object Manager
USERS
Users
Permission Set Groups
Permission Sets
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Feature Settings
Data.com
Prospector Users
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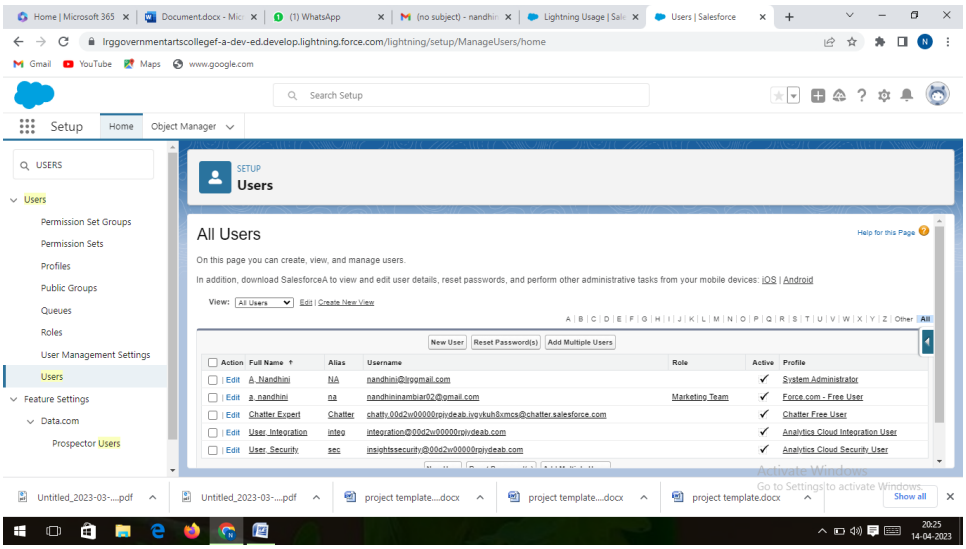
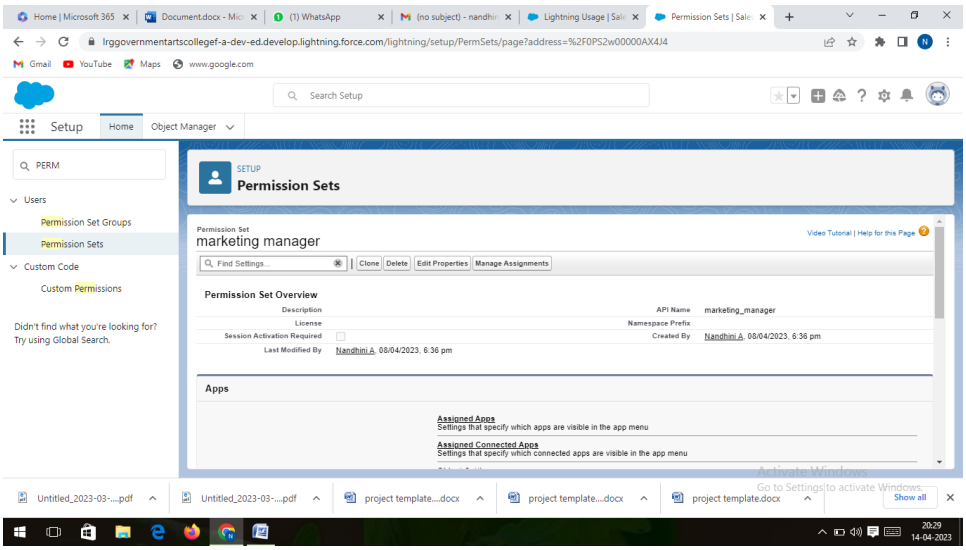
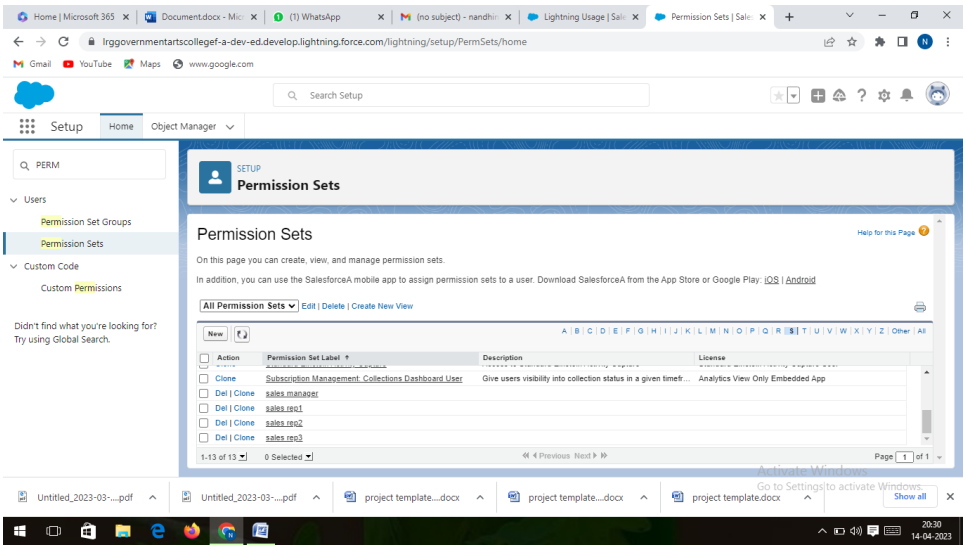
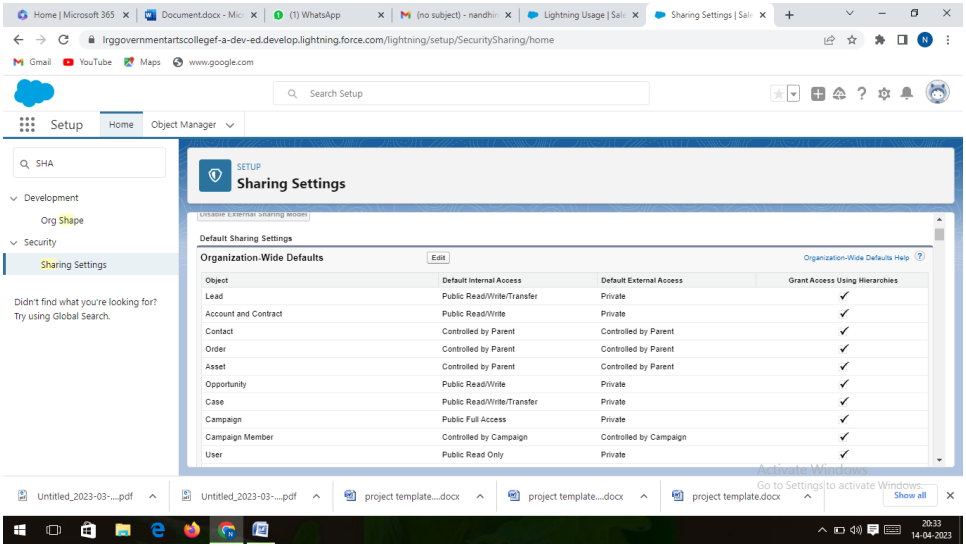


PERMISSION SETS:

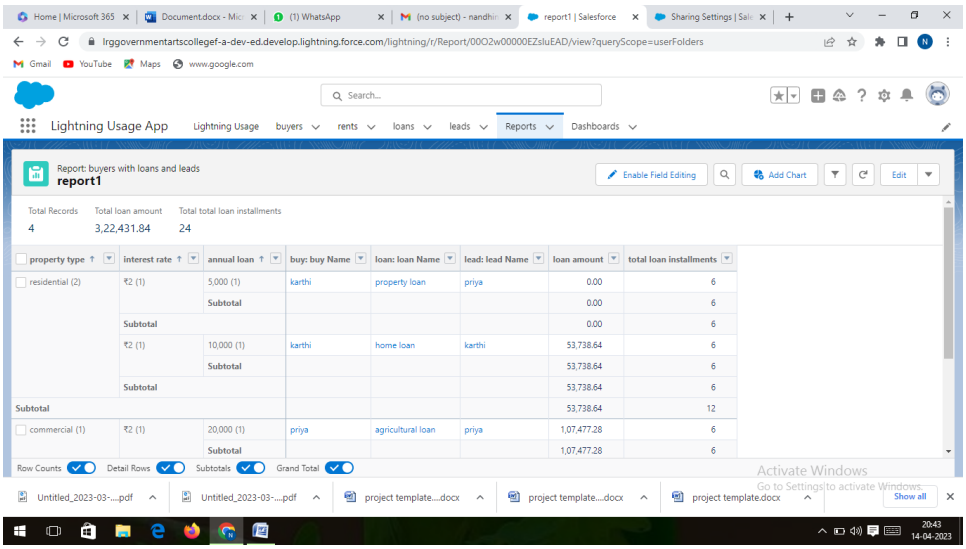


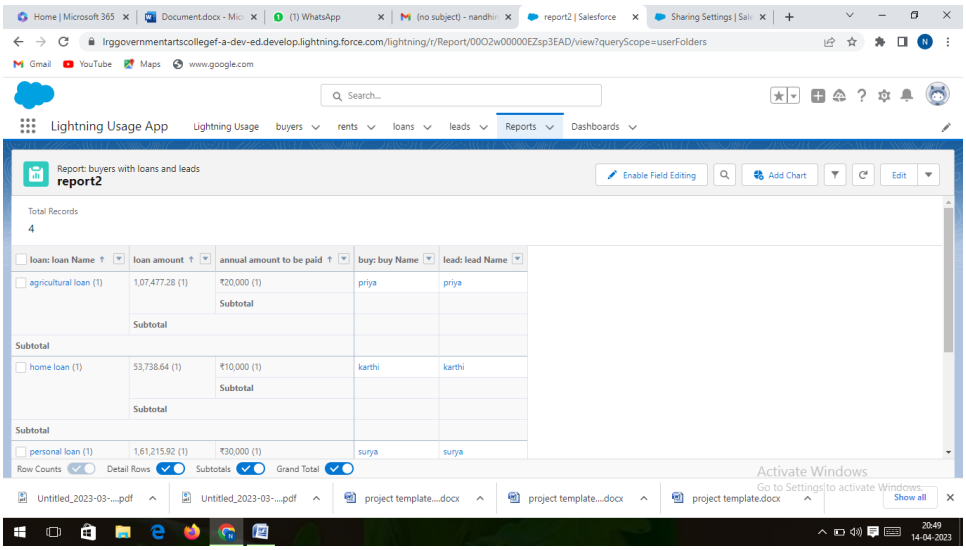


SETUP FOR OWD:

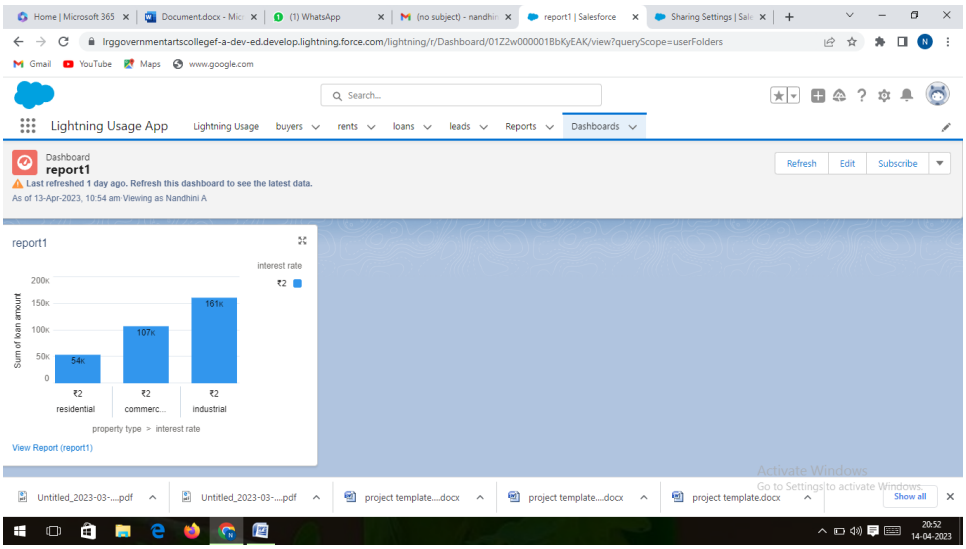


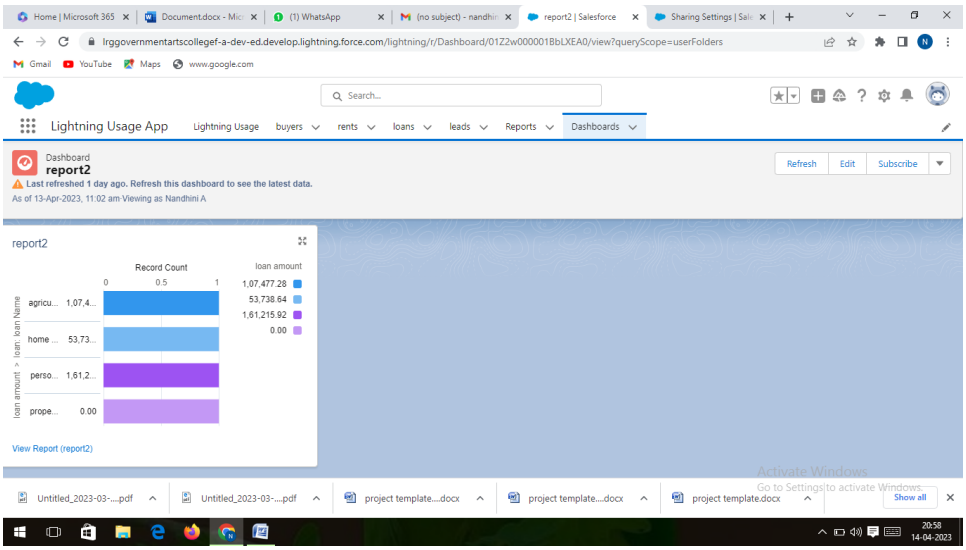
REPORT:


Lightning Usage App
Report: buyers with loans and leads
report1
Total Records
4
Total loan amount
3,22,431.84
Total total loan installments
24
property type
interest rate
annual loan
buy: buy Name
loan: loan Name
lead: lead Name
loan amount
total loan installments
residential (2)
₹2 (1)
5,000 (1)
karthi
property loan
priya
0.00
6
Subtotal
0.00
6
Subtotal
0.00
6
₹2 (1)
10,000 (1)
karthi
home loan
karthi
53,738.64
6
Subtotal
53,738.64
6
Subtotal
53,738.64
6
Subtotal
53,738.64
12
commercial (1)
₹2 (1)
20,000 (1)
priya
agricultural loan
priya
1,07,477.28
6
Subtotal
1,07,477.28
6
Row Counts
Detail Rows
Subtotals
Grand Total


Lightning Usage App
Report: buyers with loans and leads
report2
Total Records
4
loan: loan Name
loan amount
annual amount to be paid
buy: buy Name
lead: lead Name
agricultural loan (1)
1,07,477.28 (1)
₹20,000 (1)
priya
priya
Subtotal
Subtotal
Subtotal
home loan (1)
53,738.64 (1)
₹10,000 (1)
karthi
karthi
Subtotal
Subtotal
Subtotal
personal loan (1)
1,61,215.92 (1)
₹30,000 (1)
surya
surya
Row Counts
Detail Rows
Subtotals
Grand Total

DASHBOARDS:





4 TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD (NANDHINI.A)-
https://trailblazer.me/id/nanda265

TEAM MEMBER 1(AMUTHA.K)-
https://trailblazer.me/id/amutk5

TEAM MEMBER 2(MOHANAPRIYA.M)-
https://trailblazer.me/id/moham1123

TEAM MEMBER 3(VARSHINI.B)-

https://trailblazer.me/id/varsb7

5 ADVANTAGES:

Centralized data management

Better tenant management

Streamlined data processes

Improved financial management

Mobile access

DISADVANTAGES:

Cost

Complexity

Integration

Dependance on salesforce

6 APPLICATION:

The application of salesforce is vast and provide numerous benefits to real estate companies. salesforce can be used to automate various

property management processes , including lease management , rent collection , save time and money.

Salesforce may integrating data from sensors and other IOT devices to provide real time insights into

property performances and improve maintenance and management processes

7 CONCLUSION:

This app is all about the field study that we have conducted on our real estate management systems

to login insight into users of the product that we design. By having these top 5 futures as the foundation of a mission critical system addressing the demands and challenges of the real

estate industry, upward trend will continue, growth will be realized, and success will be inevitable.

8 FUTURE SCOPE:

The application and future scope of property management using salesforce are

vast and the platform has the potential to transform the way real estate companies manage their properties.