

Date	22-04-2023
Team ID	NM2023TMID08161
Project Name	PROPERTY MANAGEMENT APPLICATION USING SALESFORCE
Team Leader	NISHA.R
Team Member	PARKAVI.K
	RAGAVI.R
	SAGASTIYA.S

1 INTRODUCTION

1.1 Overview

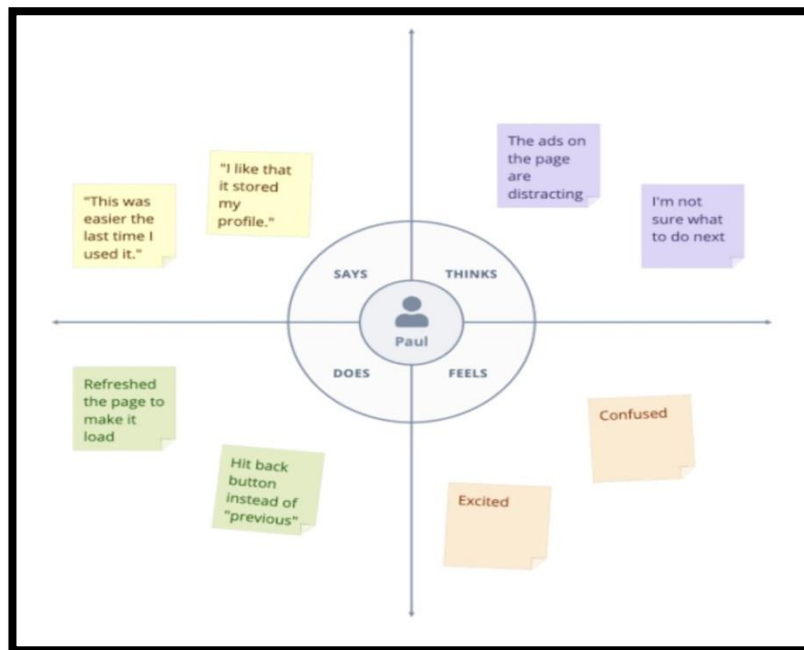
Our project aims to improve the functioning Property management application using salesforce. We achieve this goal by creating custom salesforce object, tab, fields, profile, users, Sharing Setting, report, Dashboard that provide easy access to the relevant data.

1.2 Purpose

Develop an app for the property management where buyer can order his requirement and get the appropriate details of the property. According to his interest just provide him with some discount 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 report and dashboard so there will be clear view just get the reports on the count of loan passed a getting the property purchased close the deal.

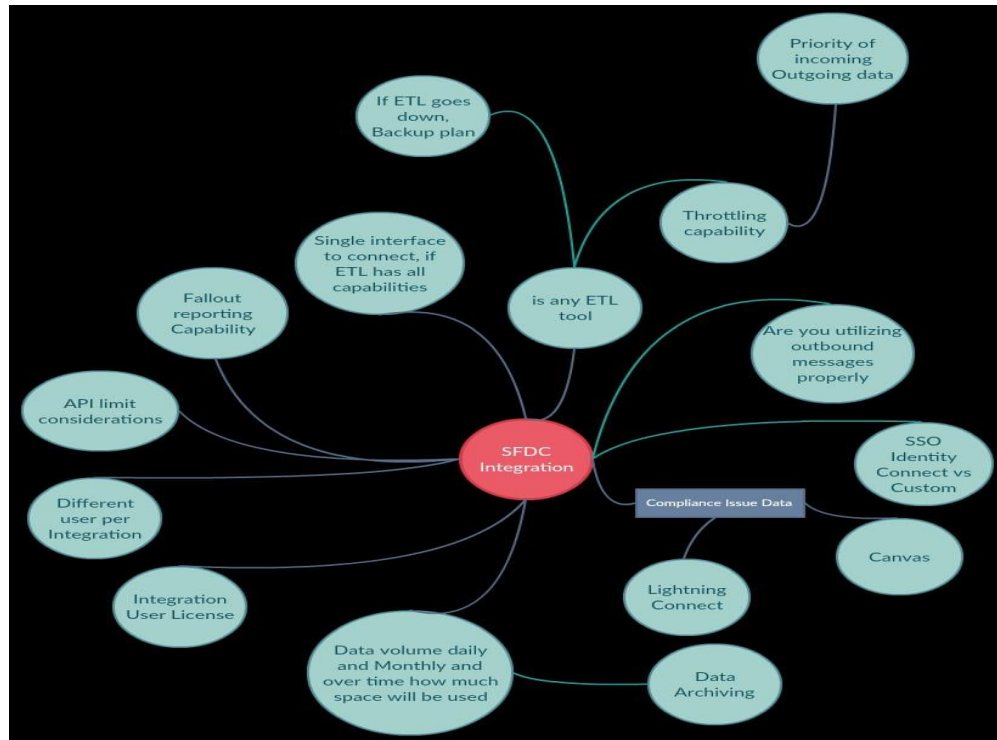
2 PROBLEM DEFINITION & DESING THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map

BRAINSTORM



GROUP IDEAS



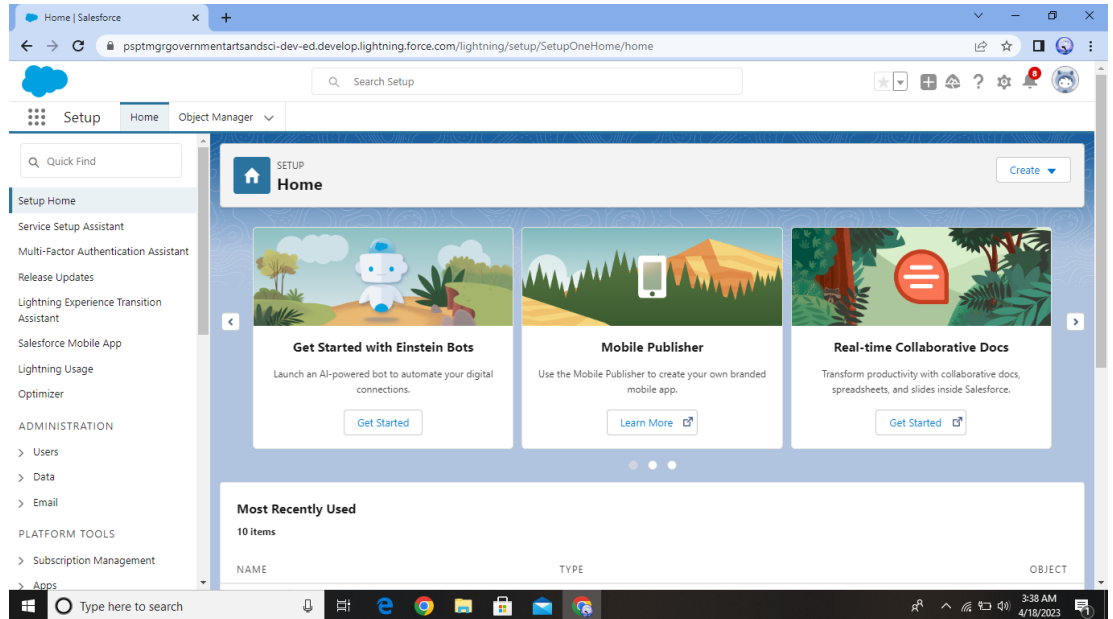
3 RESULT

3.1 Data Model

Object Name	Fields in the Object	
	Field Label	Date Type
lead	Lead	Auto Number
	State	Pick list
	City	Pick list
	E mail	E mail
	Phone	Phone
Buy	Property type	Pick list
	Discount	Percent
	State	Pick list
	City	Pick list
Rent	Rent	Auto Number
	Rental City	Text
	BHK Type	Pick list
Loan	Loan ID	Auto Number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total Loan Installments	Number
	Loan Repayment	Number
	Loan Amount	Formula

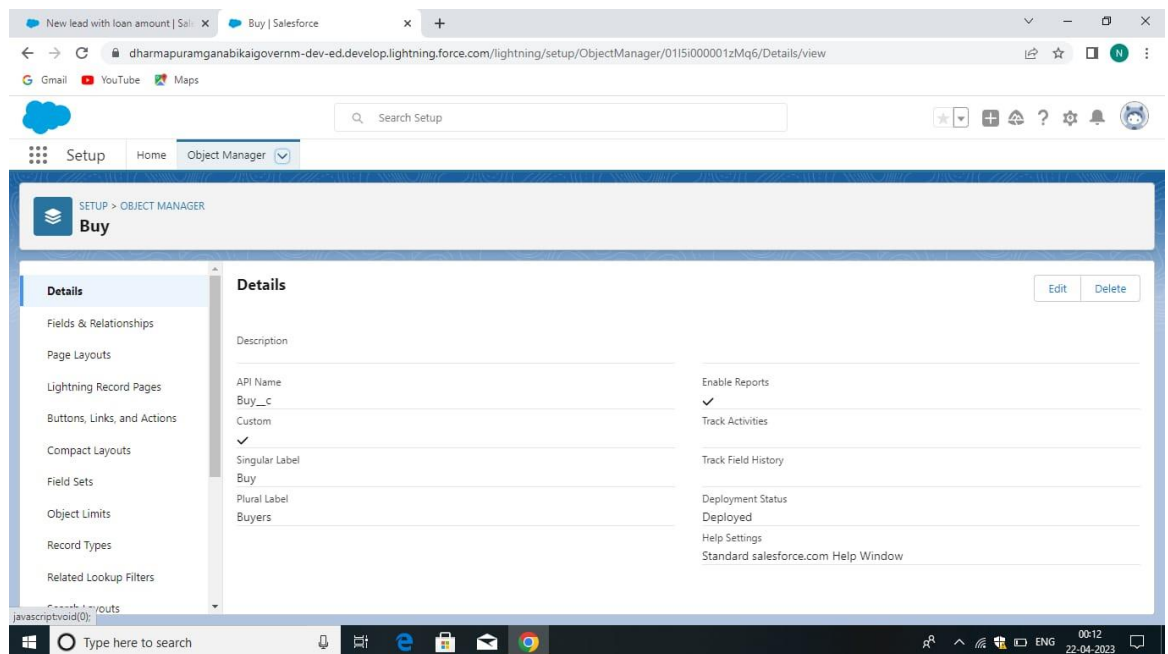
3.2 Activity & Screenshot

Milestone 1:



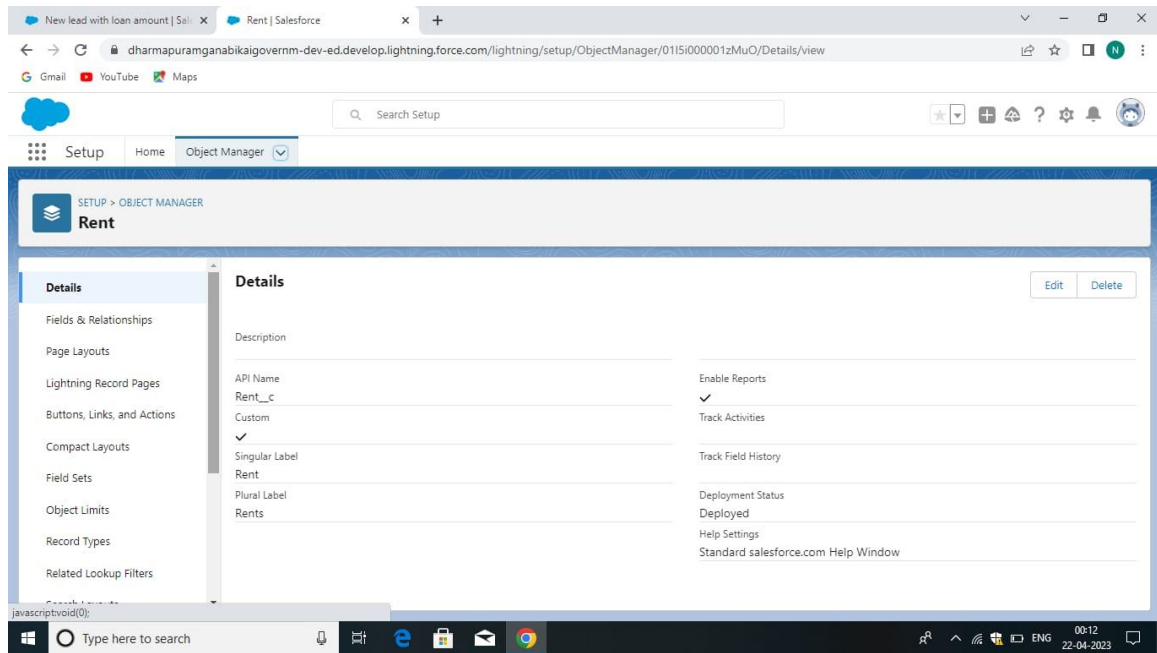
Creation of Salesforce Account

Milestone 2:

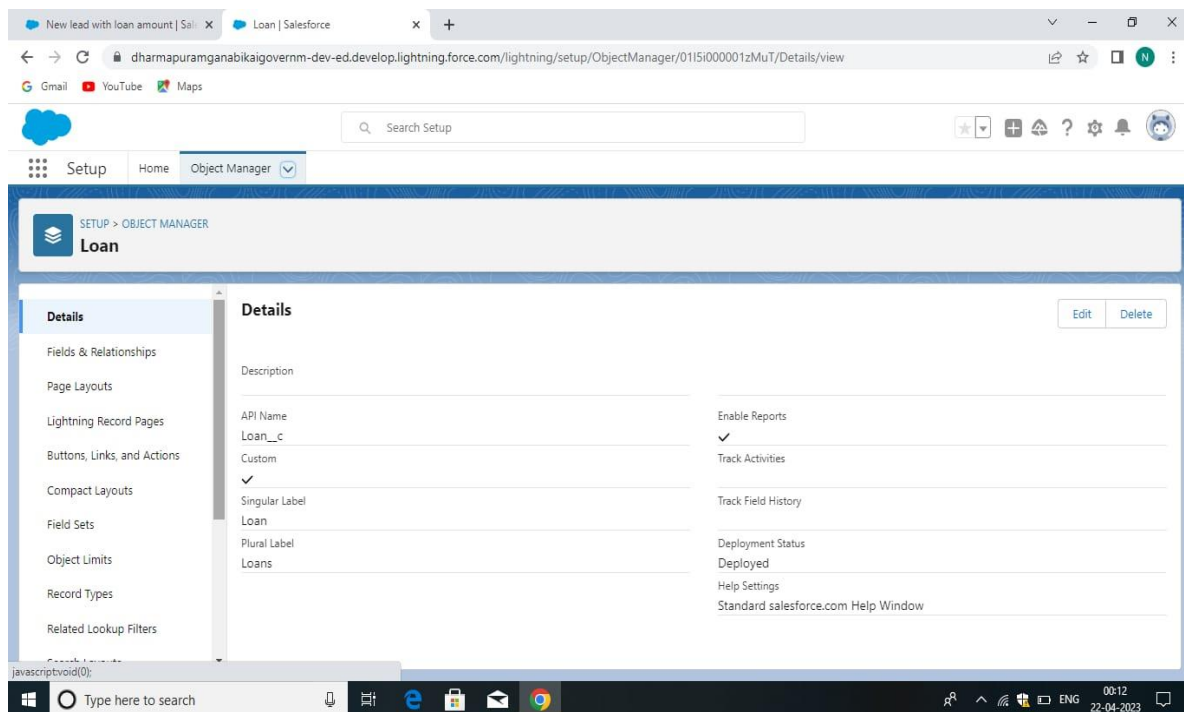


Creation of object

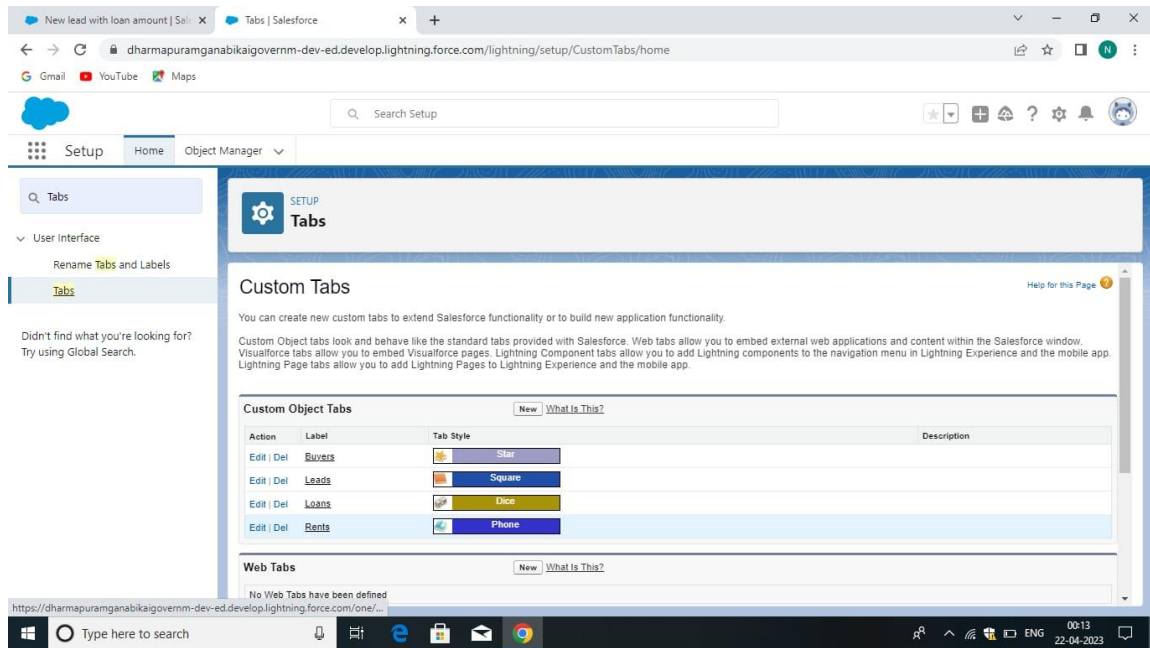
Milestone 3:



The screenshot shows the Salesforce Object Manager interface for the 'Rent' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, 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 'Details' and includes a 'Description' field, an 'API Name' field with the value 'Rent_c', a 'Custom' checkbox, a 'Singular Label' field with the value 'Rent', a 'Plural Label' field with the value 'Rents', an 'Enable Reports' checkbox, a 'Track Activities' checkbox, a 'Track Field History' checkbox, a 'Deployment Status' field with the value 'Deployed', and a 'Help Settings' link. The bottom of the screen shows a Windows taskbar with the search bar and various application icons.

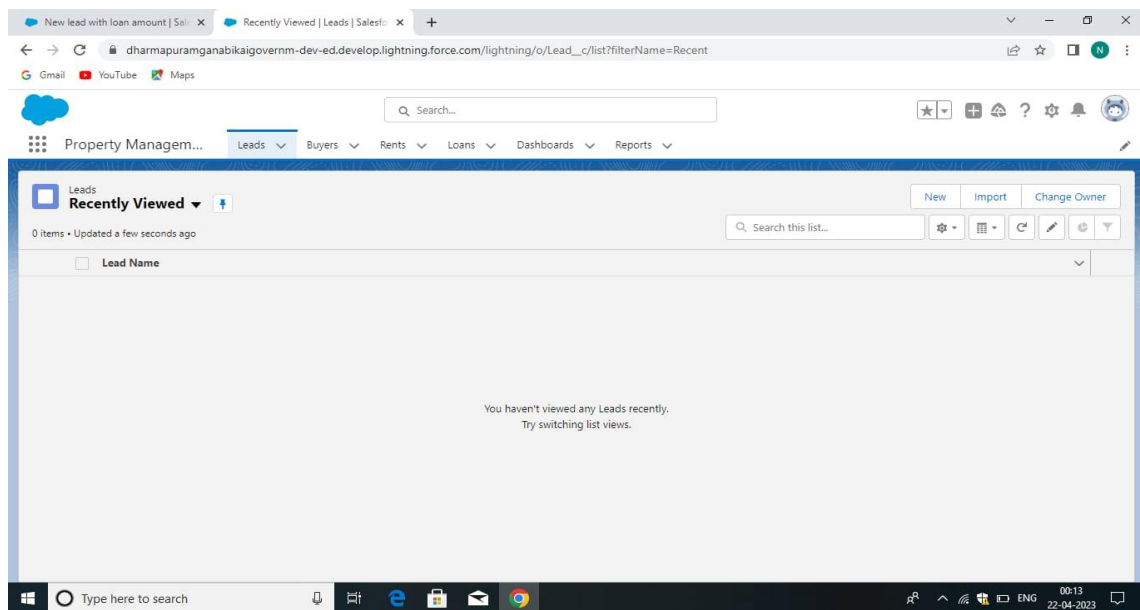


The screenshot shows the Salesforce Object Manager interface for the 'Loan' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and includes a 'Description' field, an 'API Name' field with the value 'Loan_c', a 'Custom' checkbox, a 'Singular Label' field with the value 'Loan', a 'Plural Label' field with the value 'Loans', an 'Enable Reports' checkbox, a 'Track Activities' checkbox, a 'Track Field History' checkbox, a 'Deployment Status' field with the value 'Deployed', and a 'Help Settings' link. The bottom of the screen shows a Windows taskbar with the search bar and various application icons.



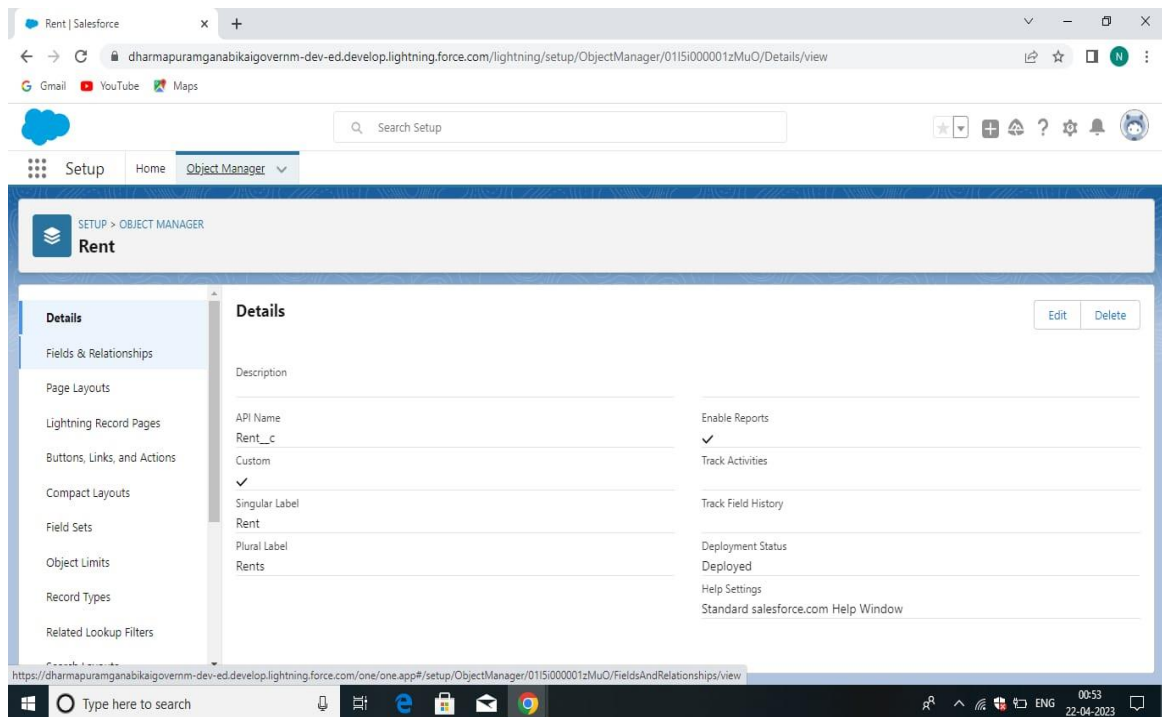
Creation of Tab

Milestone 4 :



Creation of Application

Milestone 5 :



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

Details

Description

API Name: Rent_c

Custom: ☒

Singular Label: Rent

Plural Label: Rents

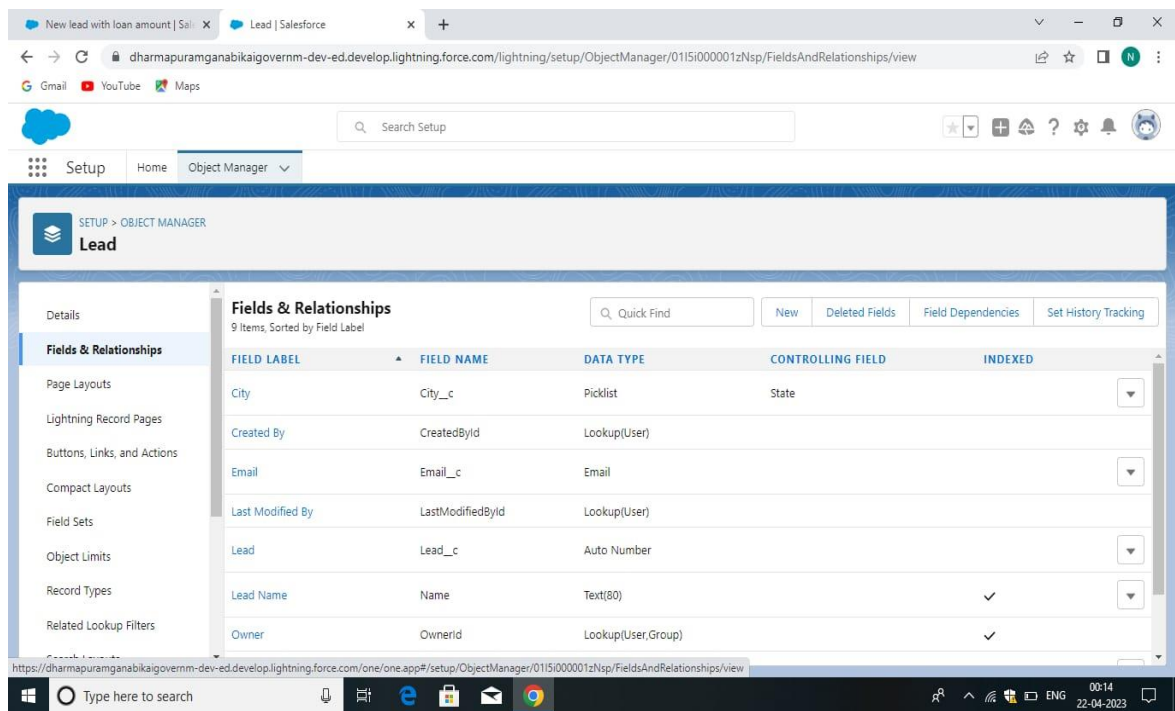
Enable Reports: ☒

Track Activities: ☐

Track Field History: ☐

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window



Setup > OBJECT MANAGER

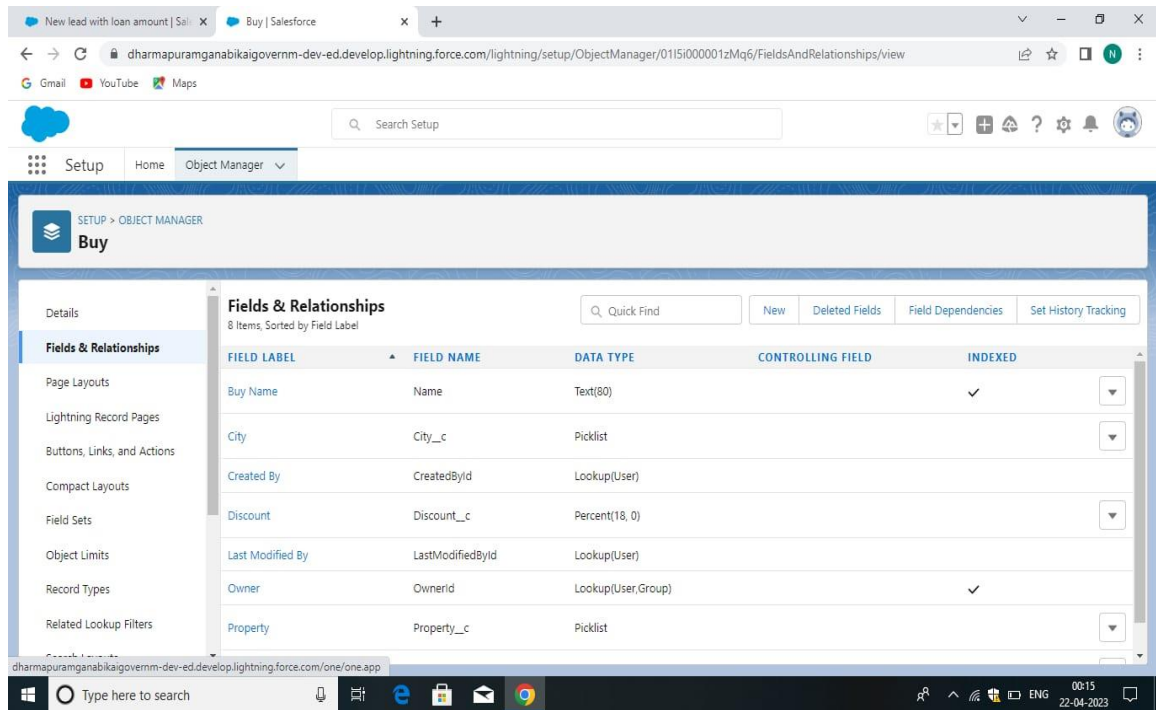
Lead

Fields & Relationships

9 Items, Sorted by Field Label

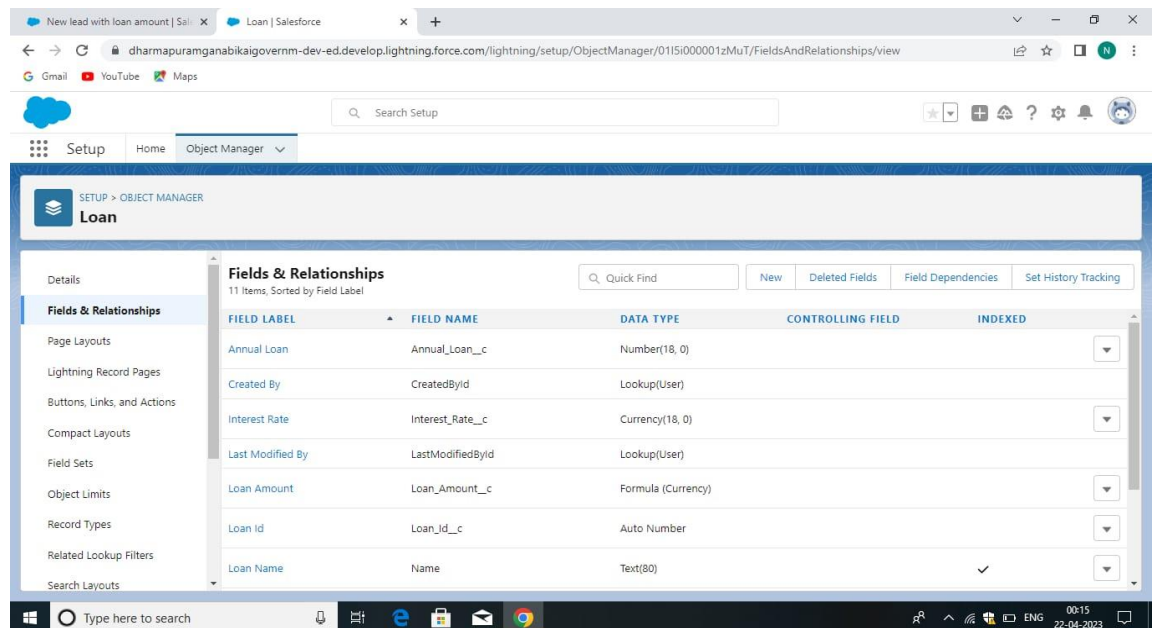
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Picklist	State	<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Email	Email_c	Email		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Lead	Lead_c	Auto Number		<input type="checkbox"/>
Lead Name	Name	Text(80)		<input checked="" type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>

Creation of Fields and relationship



The screenshot shows the Salesforce Setup interface for the 'Buy' object. The 'Fields & Relationships' section is active, displaying a list of 8 fields sorted by Field Label. The fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy Name	Name	Text(80)		✓
City	City__c	Picklist		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Property	Property__c	Picklist		

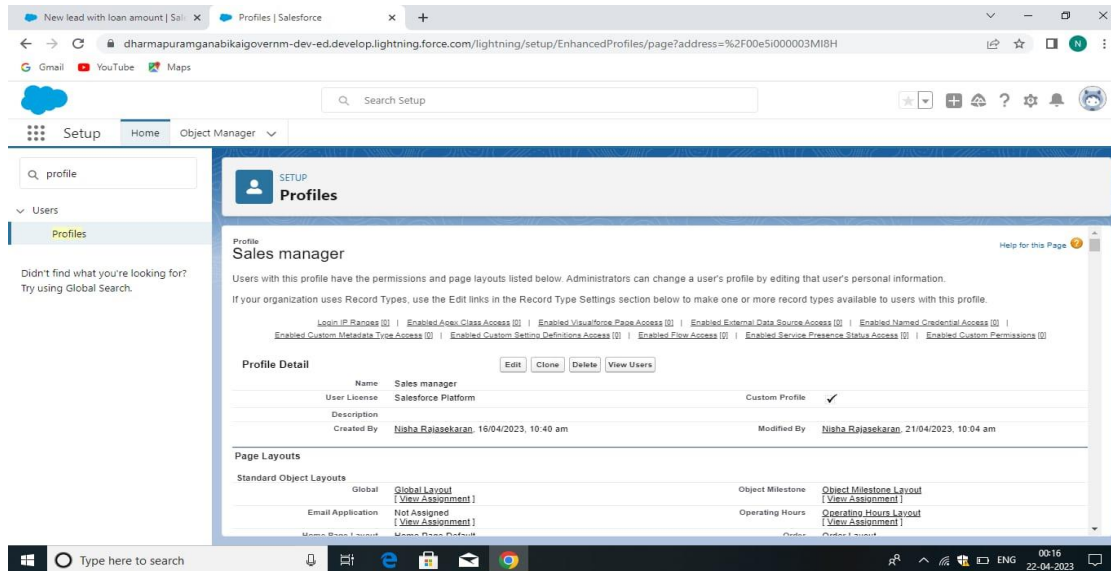


The screenshot shows the Salesforce Setup interface for the 'Loan' object. The 'Fields & Relationships' section is active, displaying a list of 11 fields sorted by Field Label. The fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan Id	Loan_Id__c	Auto Number		
Loan Name	Name	Text(80)		✓

Creation of Fields and relationship

Milestone 6:



The screenshot shows the Salesforce Setup interface for the 'Sales manager' profile. The browser address bar indicates the URL: `lightning/setup/EnhancedProfiles/page?address=%2F00e5i000003M18H`. The left sidebar shows the 'Setup' menu with 'Profiles' selected. The main content area displays the profile details for 'Sales manager'.

Profile: Sales manager

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.

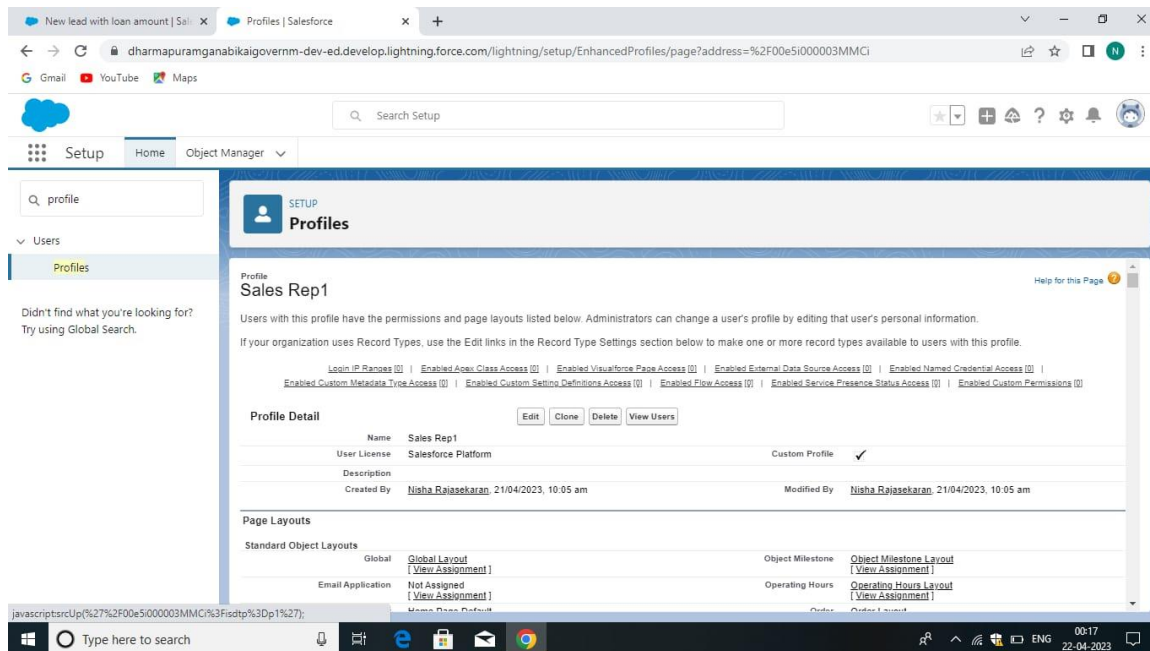
Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail [Edit] [Clone] [Delete] [View Users]

Name	Sales manager	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Nisha Rajasekaran, 16/04/2023, 10:40 am	Modified By	Nisha Rajasekaran, 21/04/2023, 10:04 am

Page Layouts

Standard Object Layouts		Object Milestone	Object Milestone Layout
Global	Global Layout [View Assignment]		
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]



The screenshot shows the Salesforce Setup interface for the 'Sales Rep1' profile. The browser address bar indicates the URL: `lightning/setup/EnhancedProfiles/page?address=%2F00e5i000003MMC1`. The left sidebar shows the 'Setup' menu with 'Profiles' selected. The main content area displays the profile details for 'Sales Rep1'.

Profile: Sales Rep1

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.

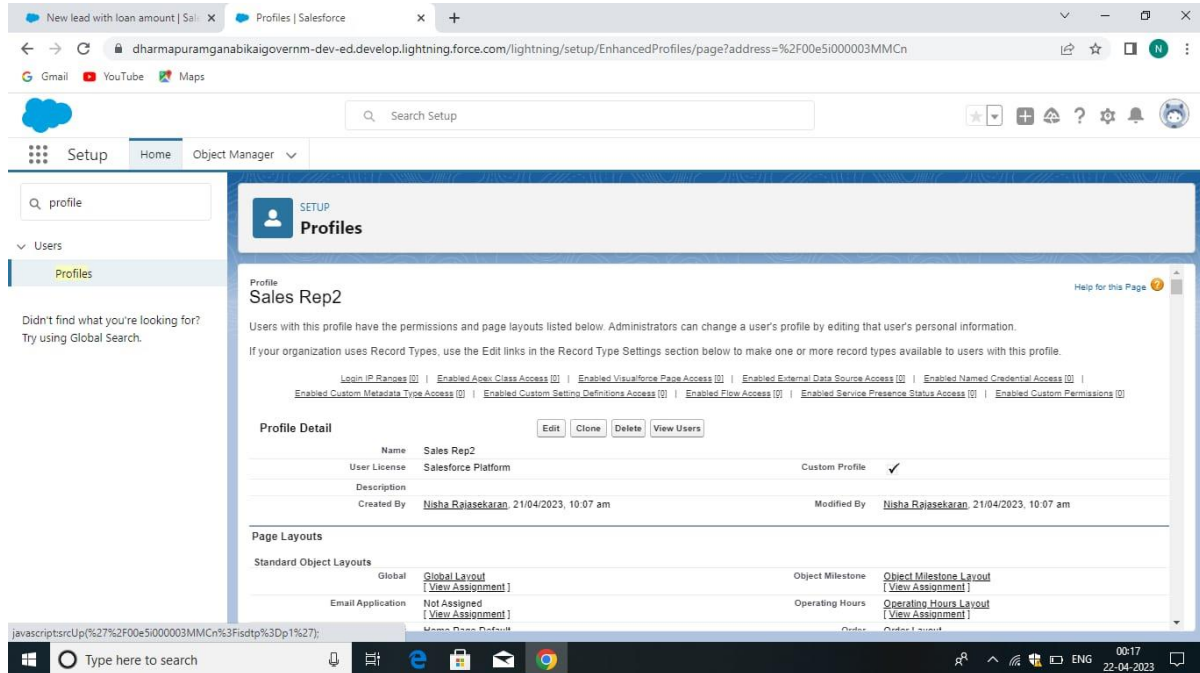
Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail [Edit] [Clone] [Delete] [View Users]

Name	Sales Rep1	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Nisha Rajasekaran, 21/04/2023, 10:05 am	Modified By	Nisha Rajasekaran, 21/04/2023, 10:05 am

Page Layouts

Standard Object Layouts		Object Milestone	Object Milestone Layout
Global	Global Layout [View Assignment]		
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]



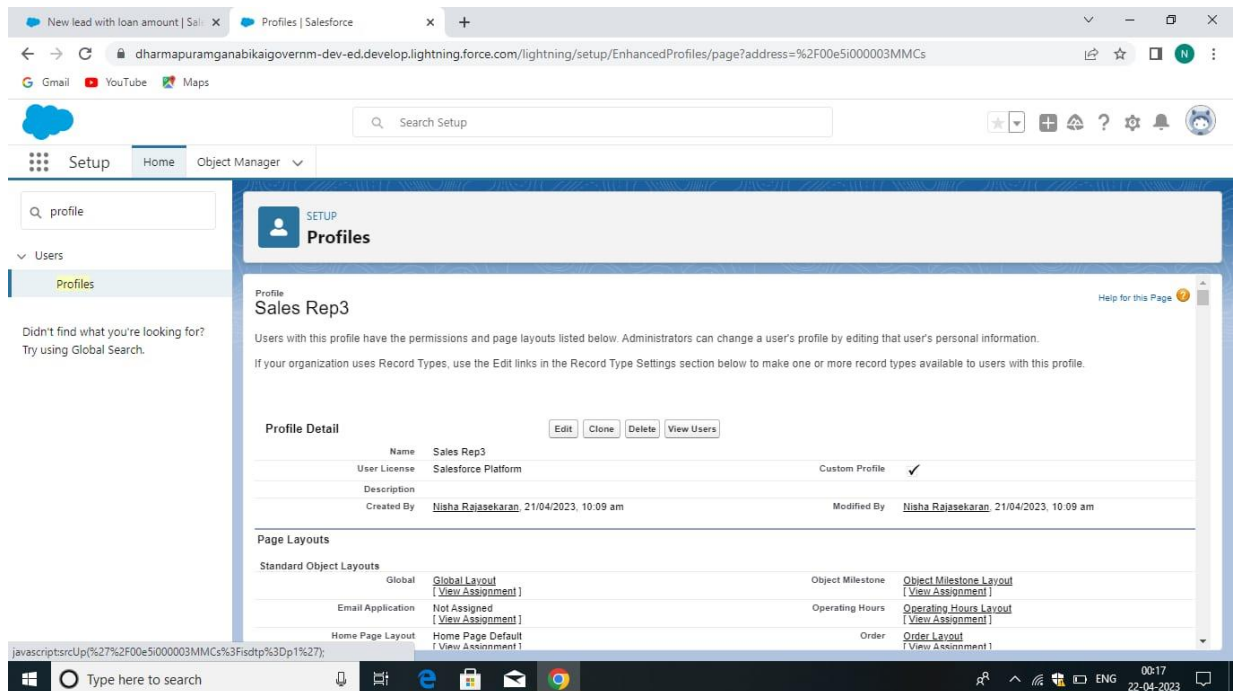
The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profile' and a list of navigation items: Users, Profiles, and a search suggestion. The main content area displays the 'Sales Rep2' profile details. The 'Profile Detail' section includes fields for Name, User License, Description, Created By, and Modified By. The 'Page Layouts' section shows the standard object layouts for Global, Email Application, Object Milestone, Operating Hours, and Order.

Profile Detail

Name	Sales Rep2
User License	Salesforce Platform
Description	
Created By	Nisha Rajasekaran, 21/04/2023, 10:07 am
Modified By	Nisha Rajasekaran, 21/04/2023, 10:07 am

Page Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order	Order Layout [View Assignment]



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profile' and a list of navigation items: Users, Profiles, and a search suggestion. The main content area displays the 'Sales Rep3' profile details. The 'Profile Detail' section includes fields for Name, User License, Description, Created By, and Modified By. The 'Page Layouts' section shows the standard object layouts for Global, Email Application, Object Milestone, Operating Hours, and Order.

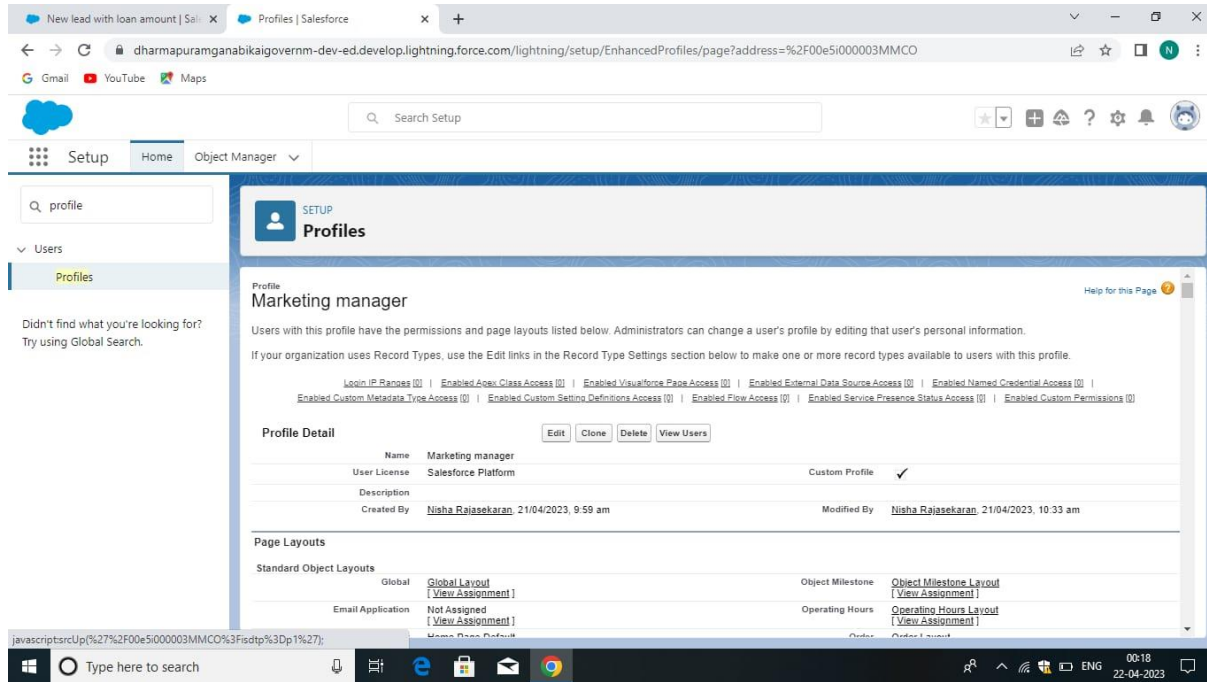
Profile Detail

Name	Sales Rep3
User License	Salesforce Platform
Description	
Created By	Nisha Rajasekaran, 21/04/2023, 10:09 am
Modified By	Nisha Rajasekaran, 21/04/2023, 10:09 am

Page Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order	Order Layout [View Assignment]

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE



Browser tabs: New lead with loan amount | Sai | Profiles | Salesforce

URL: dharmapuramganabikaigovernm-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5i000003MMCO

Search Setup

Setup Home Object Manager

Search: profile

Users Profiles

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

SETUP Profiles

Profile: Marketing manager

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.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Marketing manager		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Nisha Rajasekaran	21/04/2023, 9:59 am	Modified By: Nisha Rajasekaran 21/04/2023, 10:33 am

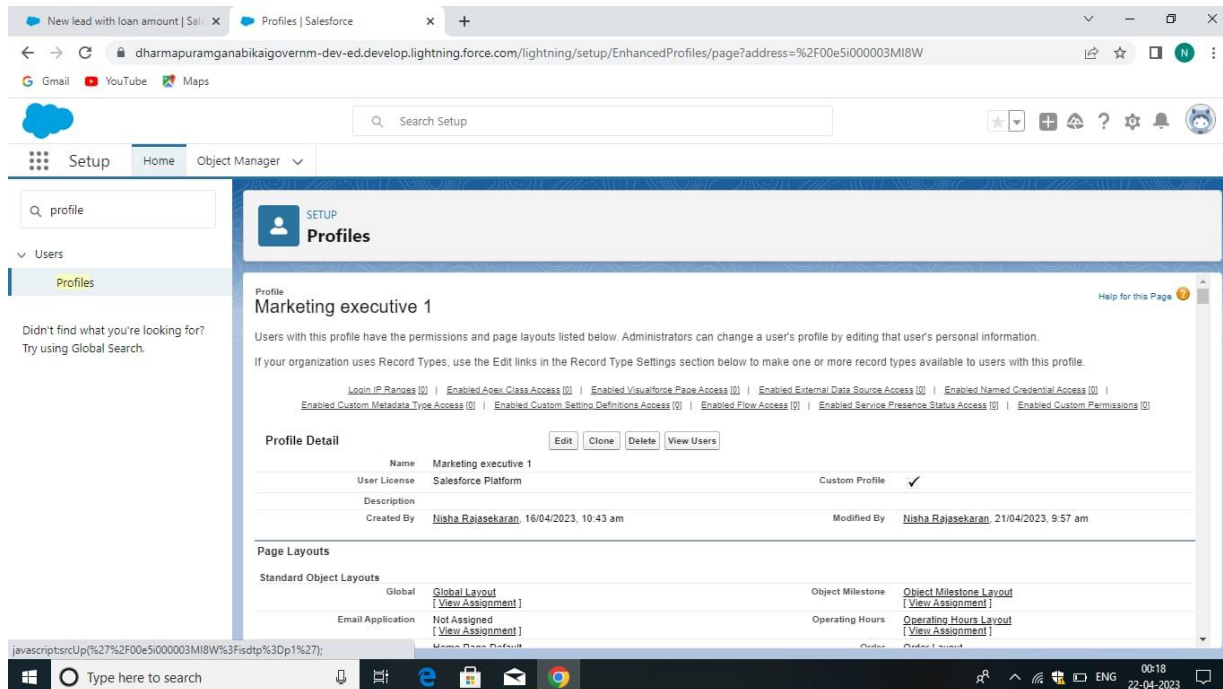
Page Layouts

Standard Object Layouts		Object Milestone	Operating Hours
Global	Global Layout View Assignment	Object Milestone Layout View Assignment	Operating Hours Layout View Assignment
Email Application	Not Assigned View Assignment		

javascriptsrcUp(%27%2F00e5i000003MMCO%3Fisdtp%3Dp1%27);

Type here to search

00:18 22-04-2023



Browser tabs: New lead with loan amount | Sai | Profiles | Salesforce

URL: dharmapuramganabikaigovernm-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5i000003MI8W

Search Setup

Setup Home Object Manager

Search: profile

Users Profiles

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

SETUP Profiles

Profile: Marketing executive 1

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.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Marketing executive 1		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Nisha Rajasekaran	16/04/2023, 10:43 am	Modified By: Nisha Rajasekaran 21/04/2023, 9:57 am

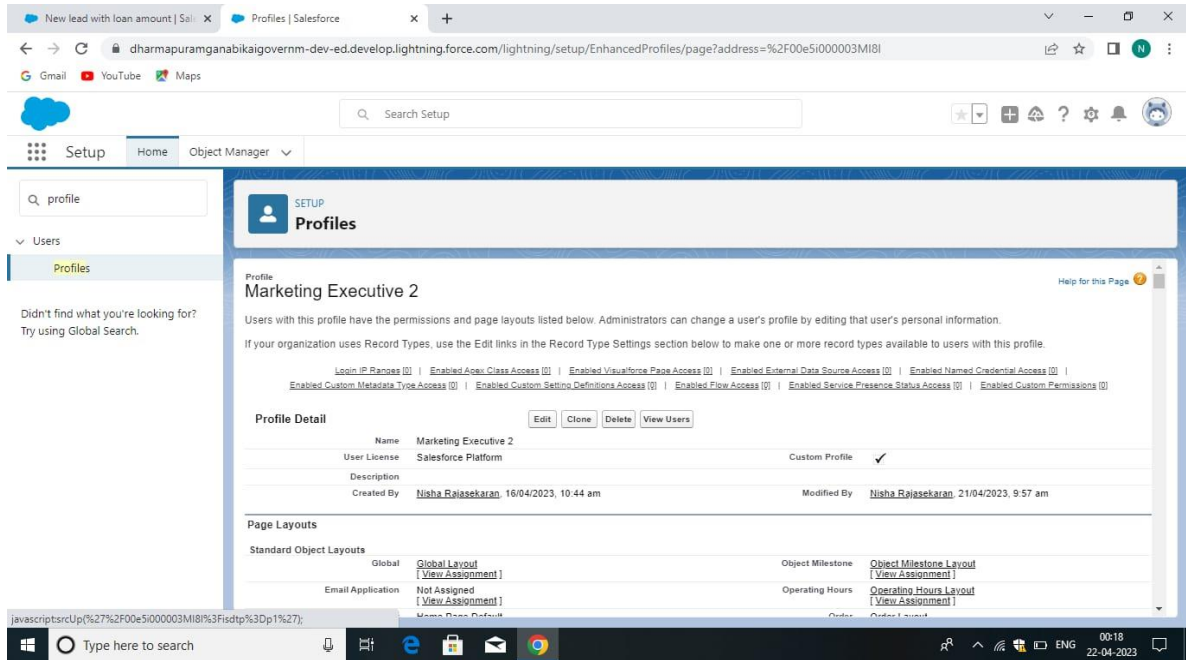
Page Layouts

Standard Object Layouts		Object Milestone	Operating Hours
Global	Global Layout View Assignment	Object Milestone Layout View Assignment	Operating Hours Layout View Assignment
Email Application	Not Assigned View Assignment		

javascriptsrcUp(%27%2F00e5i000003MI8W%3Fisdtp%3Dp1%27);

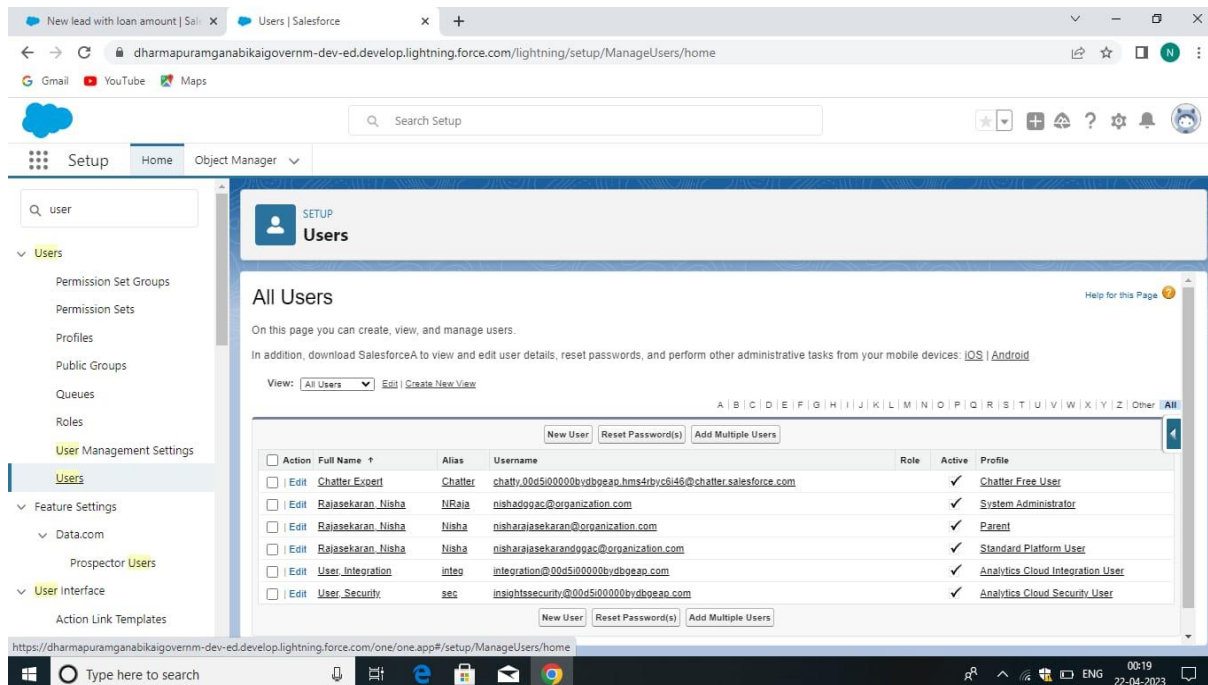
Type here to search

00:18 22-04-2023



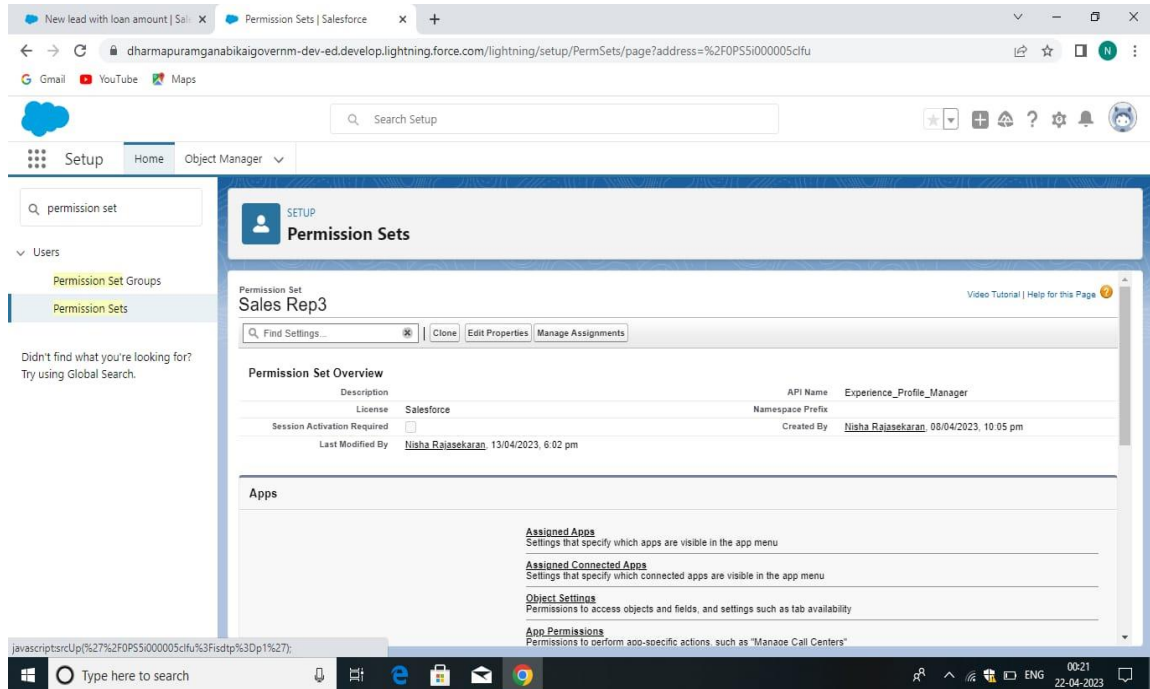
Creation of Profile

Milestone 7:



Creation of Users

Milestone 8:



The screenshot shows the Salesforce Setup interface for a Permission Set named 'Sales Rep3'. The left sidebar shows the navigation menu with 'Permission Sets' selected. The main content area displays the 'Permission Set Overview' for 'Sales Rep3'. Below the overview, there are sections for 'Apps', 'Assigned Areas', 'Assigned Connected Areas', 'Object Settings', and 'App Permissions'.

Description	License	API Name	Experience_Profile_Manager
Session Activation Required	<input type="checkbox"/>	Namespace Prefix	
Last Modified By	Nisha Rajasekaran	Created By	Nisha Rajasekaran

Created By: Nisha Rajasekaran, 08/04/2023, 10:05 pm

Last Modified By: Nisha Rajasekaran, 13/04/2023, 6:02 pm

Apps

Assigned Areas
Settings that specify which apps are visible in the app menu

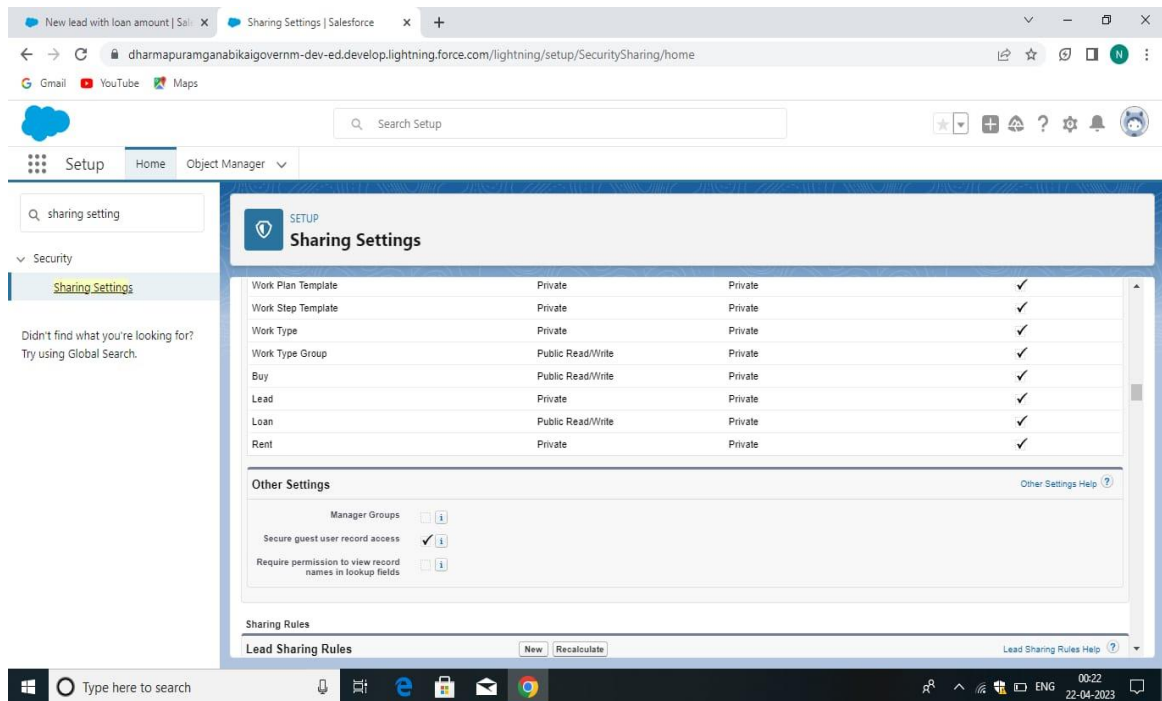
Assigned Connected Areas
Settings that specify which connected apps are visible in the app menu

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

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Creation of Permission sets

Milestone 9:



The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar shows the navigation menu with 'Sharing Settings' selected. The main content area displays the 'Sharing Settings' configuration page. Below the overview, there are sections for 'Work Plan Template', 'Work Step Template', 'Work Type', 'Work Type Group', 'Buy', 'Lead', 'Loan', 'Rent', 'Other Settings', and 'Sharing Rules'.

Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Buy	Public Read/Write	Private	✓
Lead	Private	Private	✓
Loan	Public Read/Write	Private	✓
Rent	Private	Private	✓

Other Settings

Manager Groups ☐ (1)

Secure guest user record access ☒ (1)

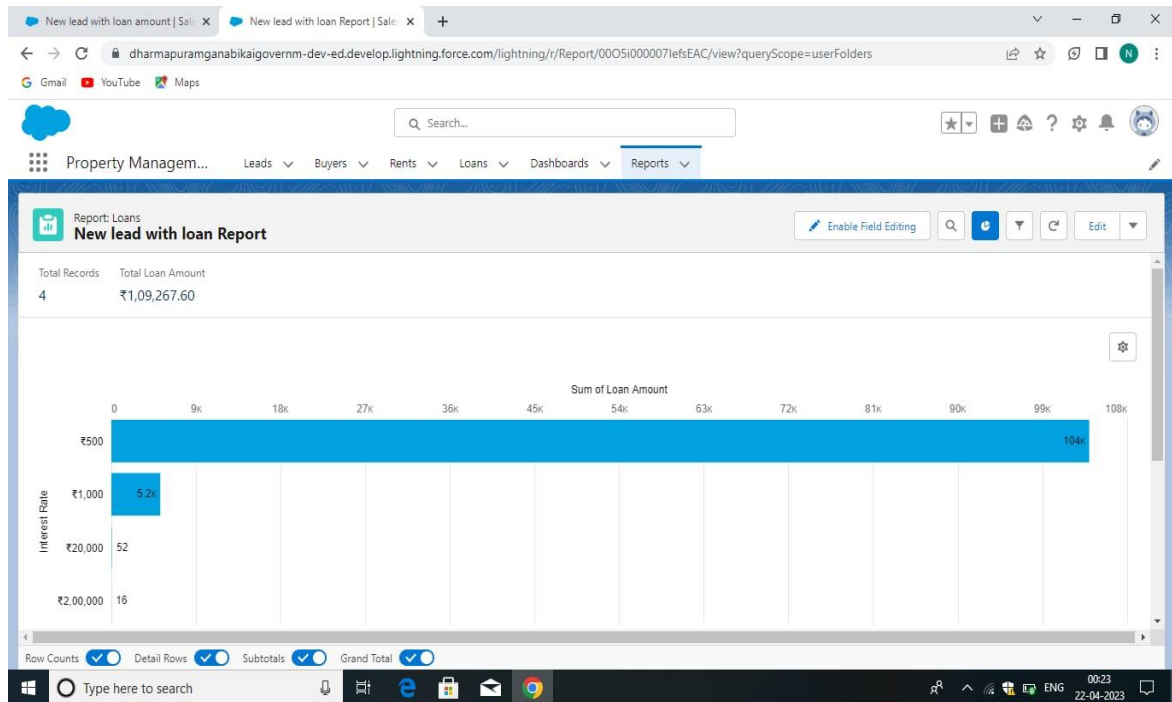
Require permission to view record names in lookup fields ☐ (1)

Sharing Rules

Lead Sharing Rules

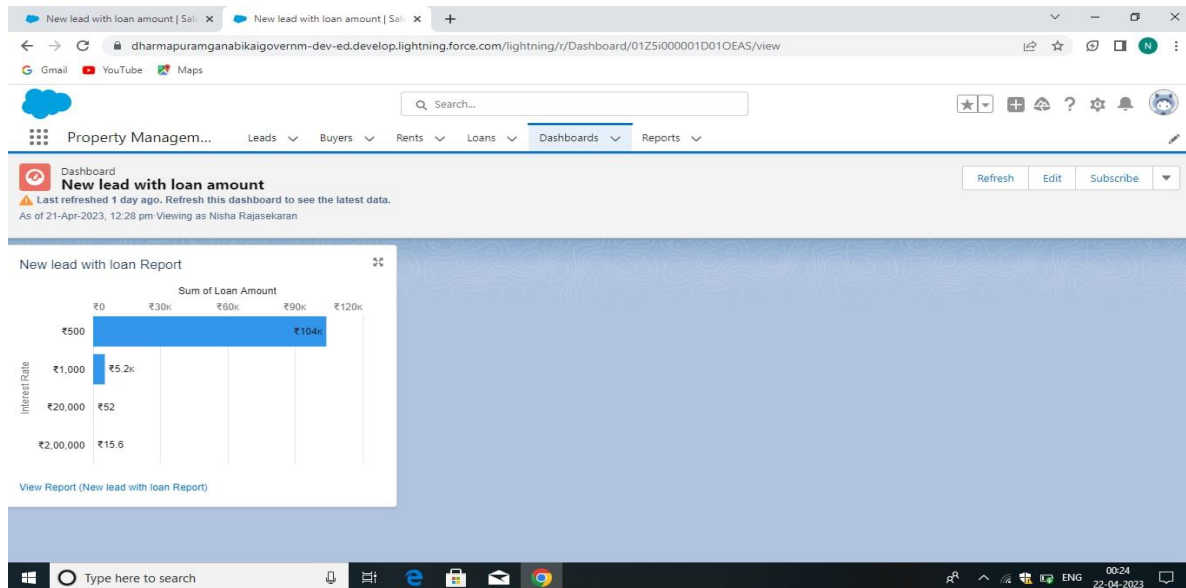
Creation of OWD

Milestone 10:



Creation of Reports

Milestone 11:



Creation of Dashboard

4 TRAILHEAD PROFILE PUBLIC URL

Team Lead - <https://trailblazer.me/id/d20uph10>

Team Member 1 - <https://trailblazer.me/id/pkumarasamy7>

Team Member 2 - <https://trailblazer.me/id/ragaviramanujam>

Team Member 3 - <https://trailblazer.me/id/ssagastiyas>

5 ADVANTAGES

- ❖ You can access your information for anywhere.
- ❖ You will save time and money by being more efficient.
- ❖ Guest satisfaction may increase with a smooth check in process.
- ❖ You can optimize your revenue stream using built-in pricing tools.

6 DISADVANTAGES

- ❖ You will be dependent on one vendor.
- ❖ Cost can be prohibitive in the beginning.
- ❖ All-in-one is not always best.

7 APPLICATION

- ❖ It allows to create of any report.
- ❖ Everything in a single system.
- ❖ Most commonly applicable in information security.

8 CONCLUSION

- ❖ To enhance efficiency of the app

9 FUTURE SCOPE

In the 21st century each and every field is computerized and all works are done by using the modern technologies so it has a good future. Property management has long been over looked in the real-estate industry, but the future of property management is brighter than ever.