PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

Project Based Experiential Learning Program

Smart Internz

Property Management Application using Salesforce

Project Description:-

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 close the deal

What you'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce

Milestone 1-Salesforce

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

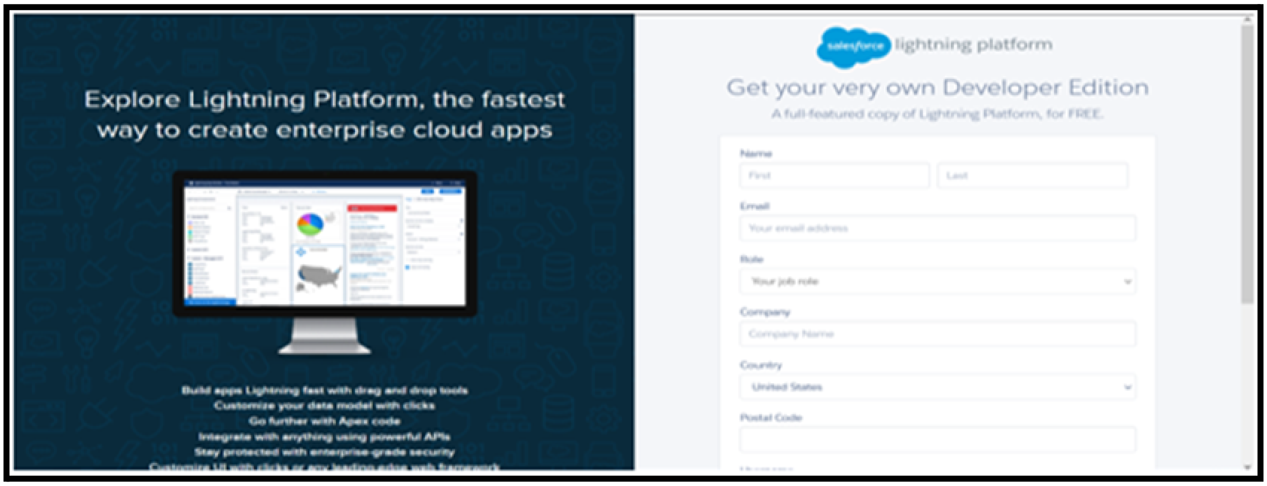
What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

https://youtu.be/r9EX3lGde5k



Activity1:

Creating Developer Account
Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :

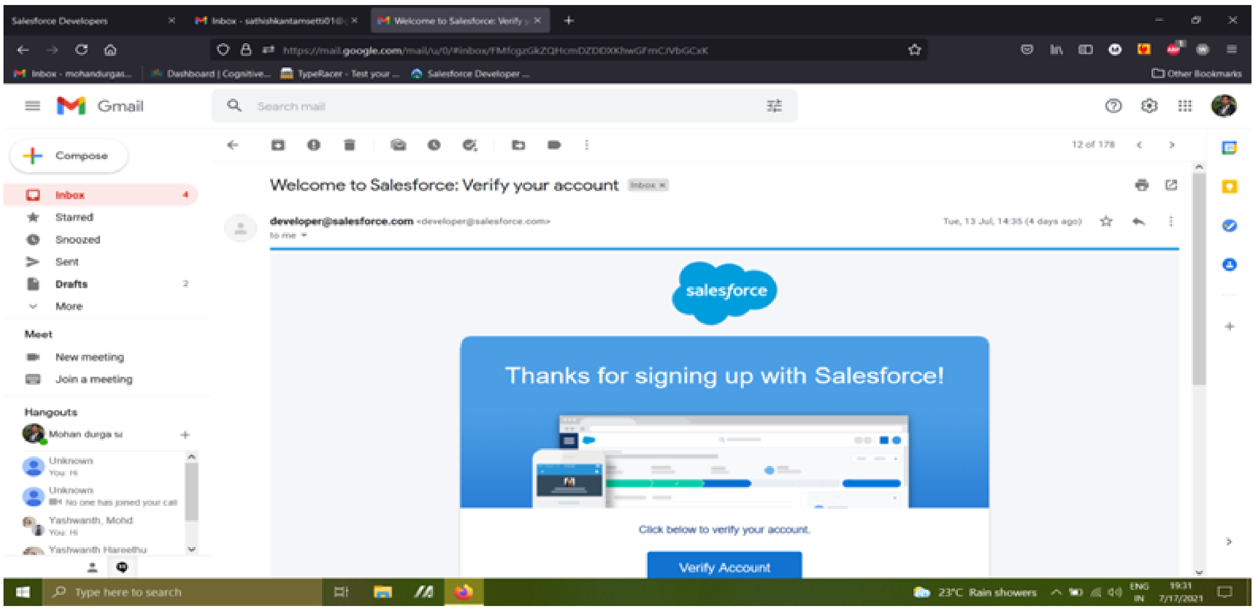
a. First name & Last name
b. Email
c. Role : Developer
d. Company : College Name
e. County : India
f. Postal Code : pin code
g. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com
Click on sign up after filling these.

Activity 2-

Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



2.

2. Login To Your Salesforce Account

Milestone 2- Object

What Is Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

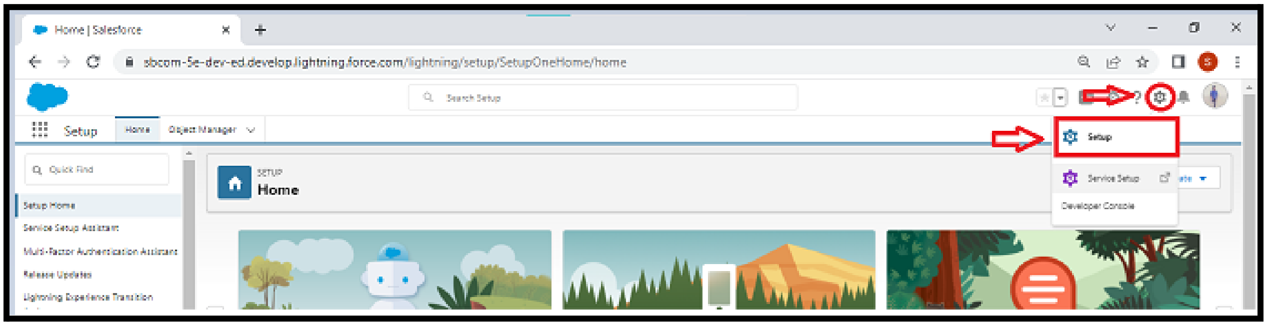
- **Standard Objects**: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Activity1:

Objects-

To Navigate to Setup page:

1. Click on gear icon → click setup.

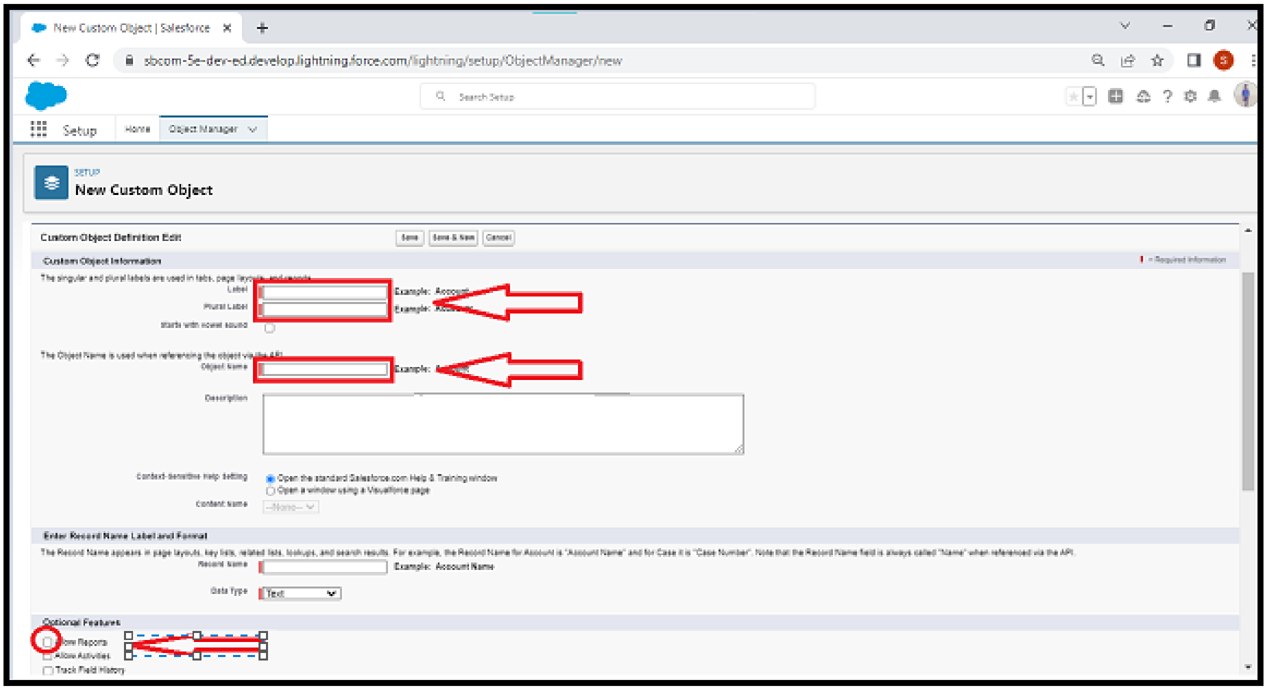


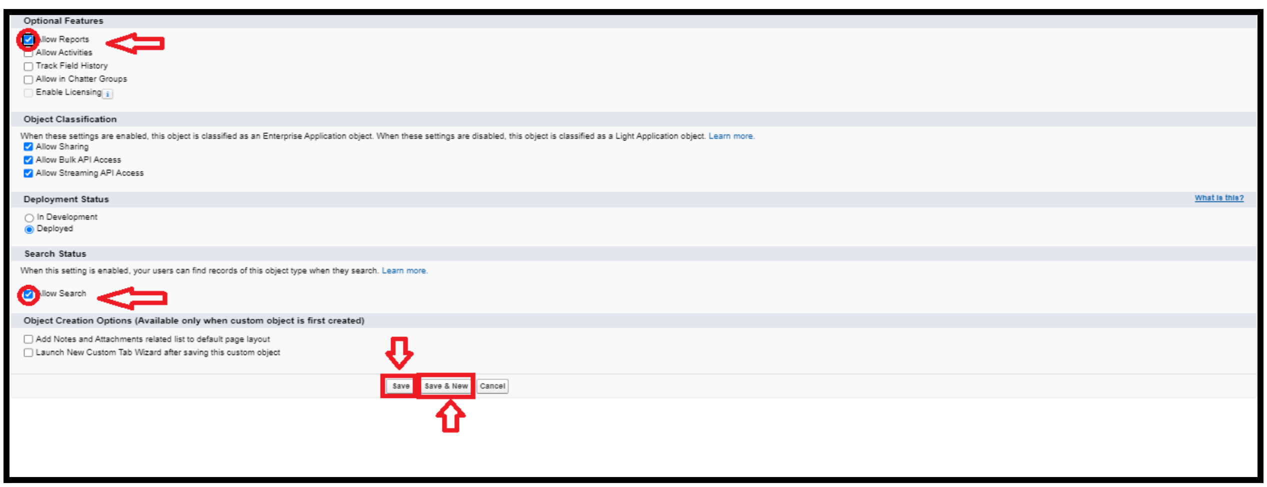
To create an object:

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

On Custom object defining page**:**

3. Enter the label name, plural label name, click on Allow reports, Allow search → **Save**





Activity2:

Create Object Buy

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→Buy
4. plural label name→ Buyers
5. click on Allow reports,
6. Allow search → **Save**

Activity3:

Create Object Rent

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→Rent
4. plural label name→ Rents
5. click on Allow reports,
6. Allow search → **Save**

Activity3:

Create Object Loan

7. To create an object:
8. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
9. Enter the label name→Loan
10. plural label name→ Loans
11. click on Allow reports,
12. Allow search → **Save**

Milestone 3:Tab

What is Tab?

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tab

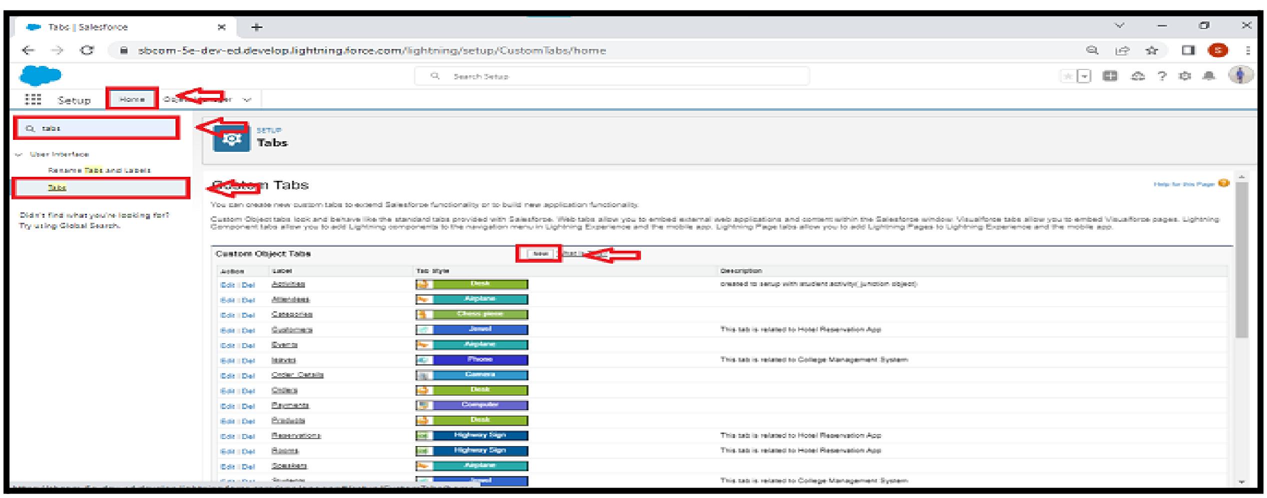
- Custom object tab
- Web tab
- Visualforce tab

Activity 1:

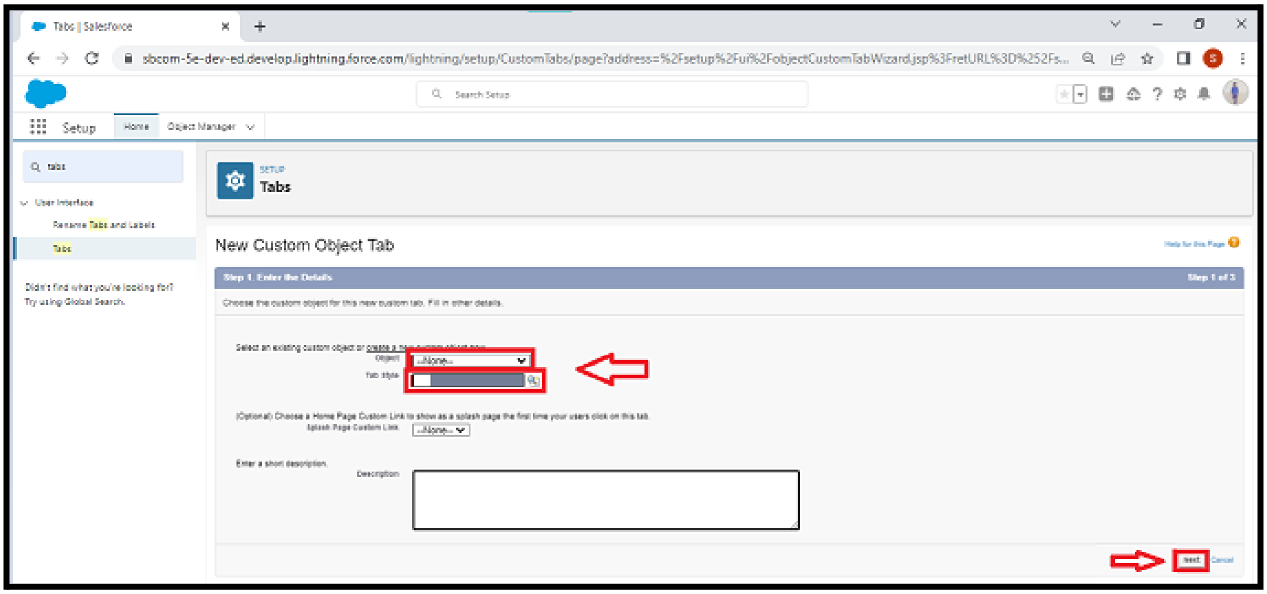
Create the Lightning Tab

To create a Tab:(Lead)

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



2. 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.



Activity 2:

To create a Tab:(Buy)

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.

Activity 3:

To create a Tab:(Rent)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(Rent) → Select the tab style → Next (Add to profiles page) keep it as default → 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

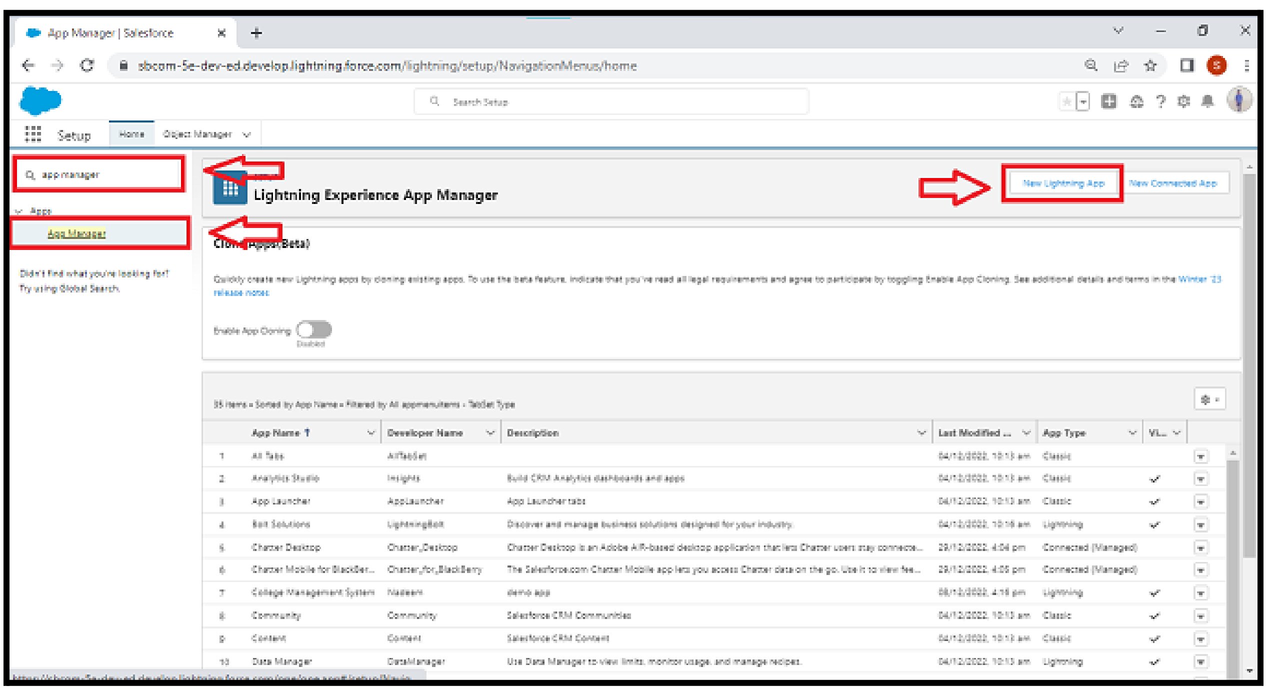
Milestone 4- The Lightning App:

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 sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

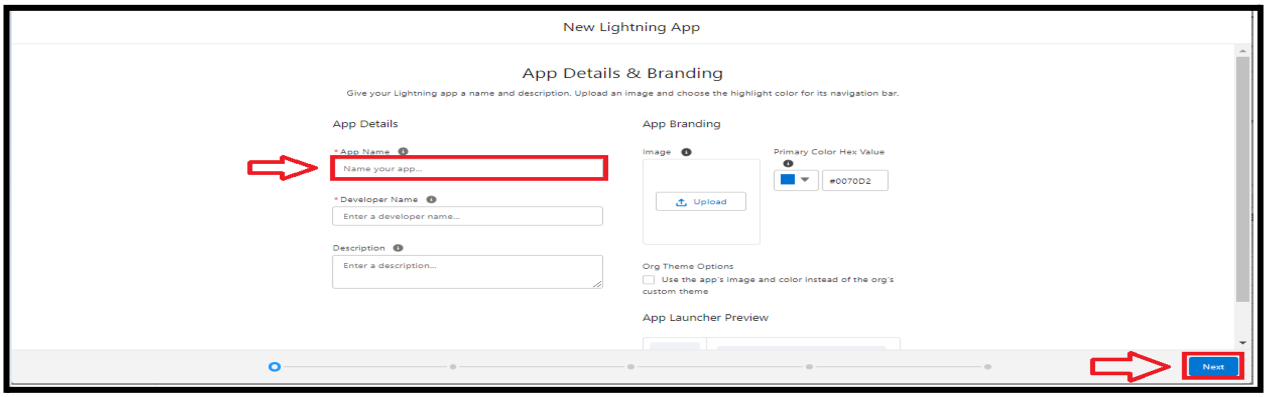
Activity1:

Create the Lightning App

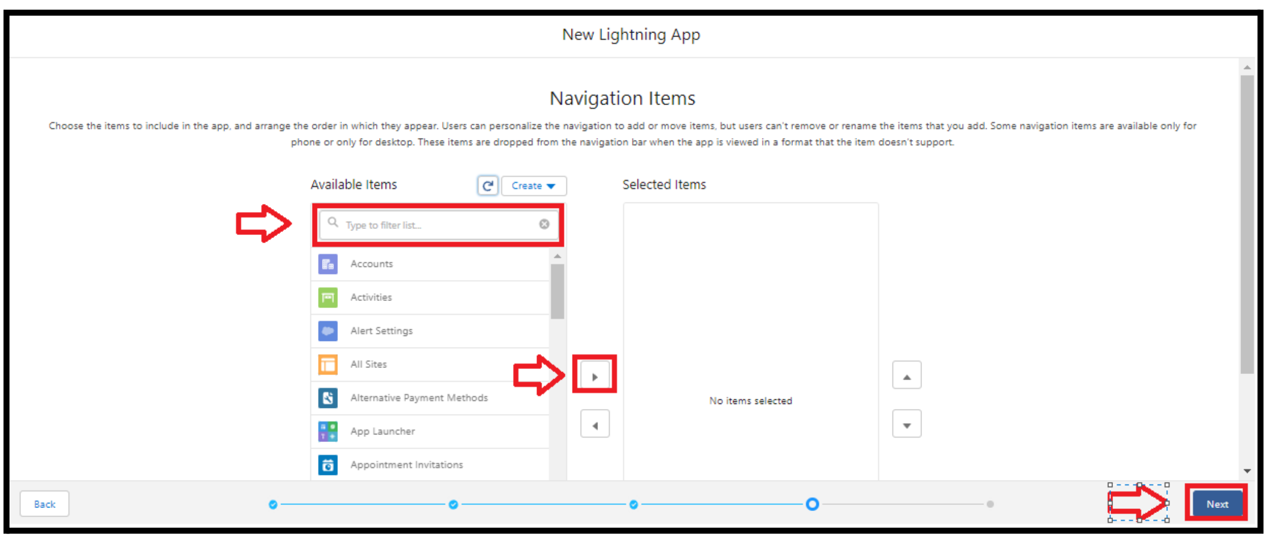
1. Go to setup page → search "app manager" in quick find → select "app manager" → click on New lightning App.



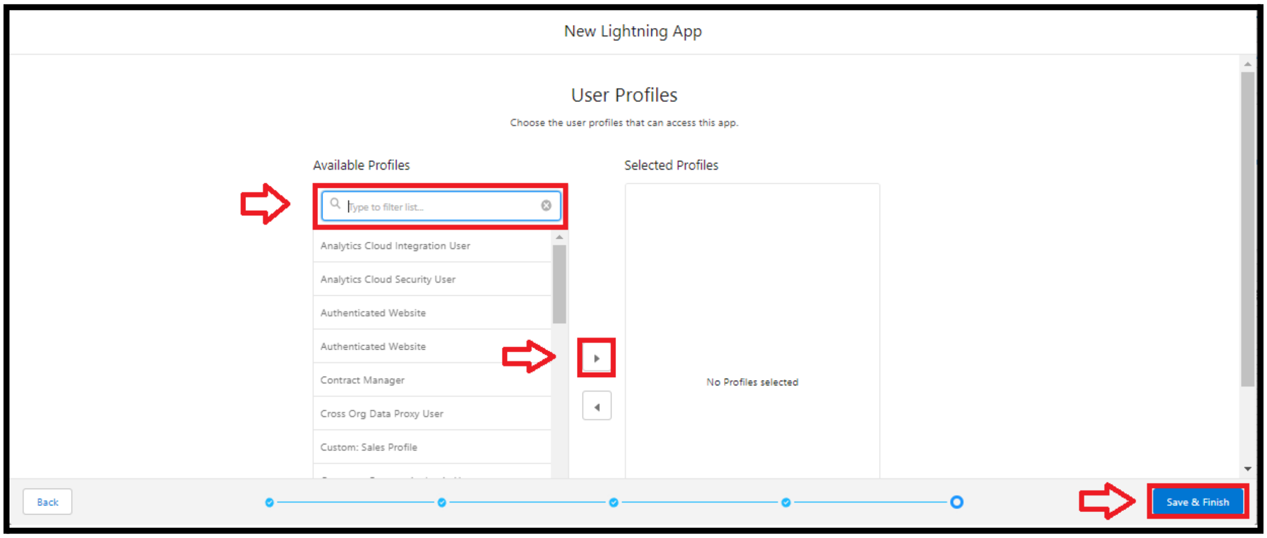
2. Fill the app name as an **Property Management** in app details and branding →Next → (App option page) keep it as default → Next
3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform user, Standard User → Next.



4. To Add Navigation Items:
   Select the items from the search bar and move it using the arrow button → Next.



5. To Add User Profiles:
   Search profiles in search bar → click on the arrow button → save & finish.



Milestone5-Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

- Standard Fields
- Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified

- Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Activity 1:

Create the Lead Field

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

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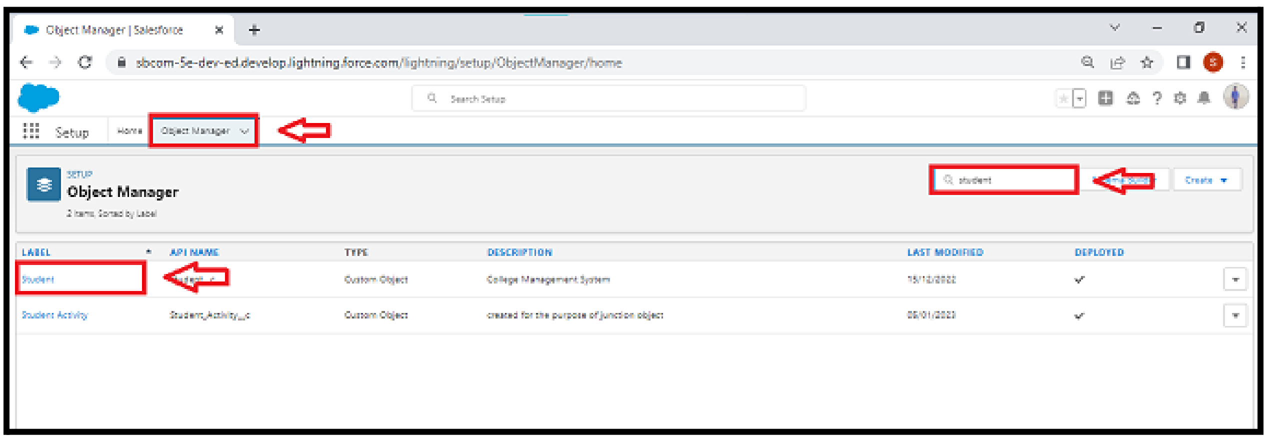
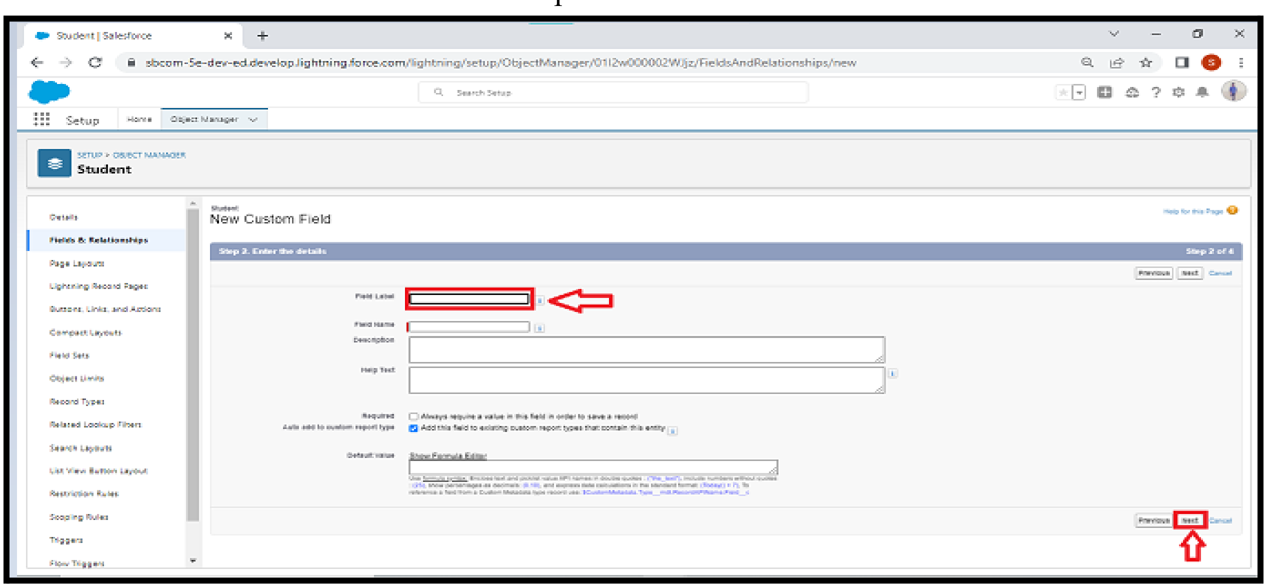
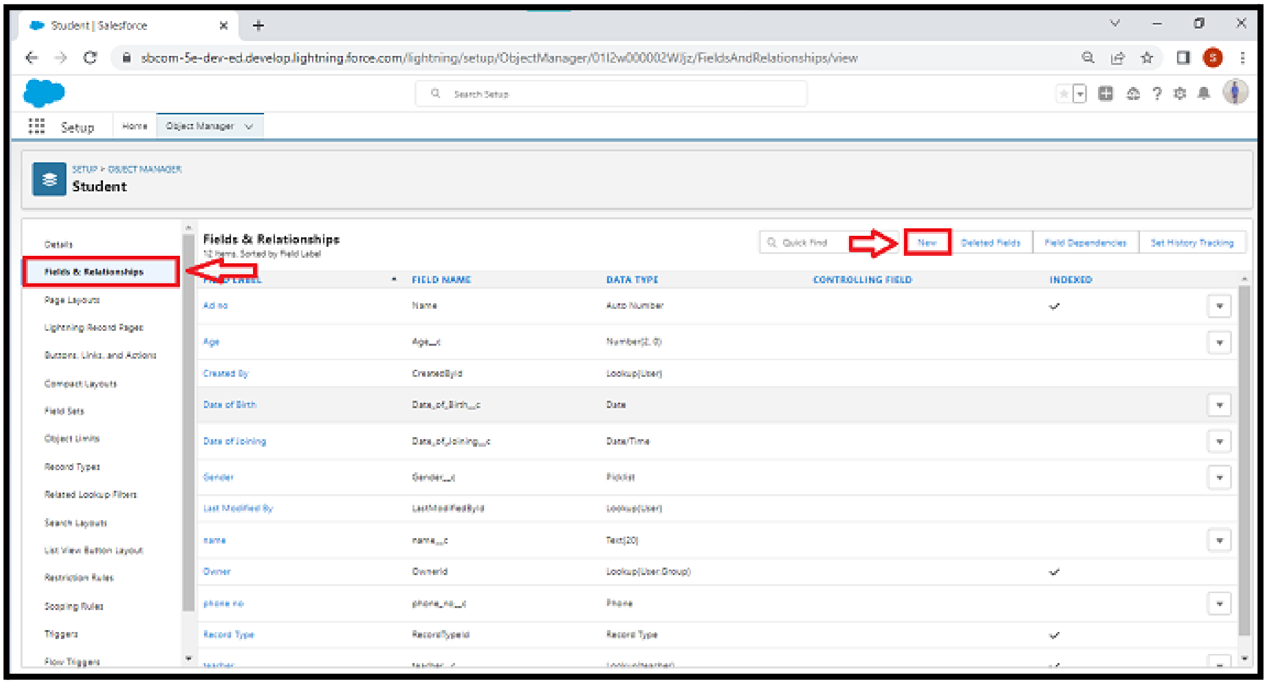


2. Now click on "Fields & Relationships " → New.

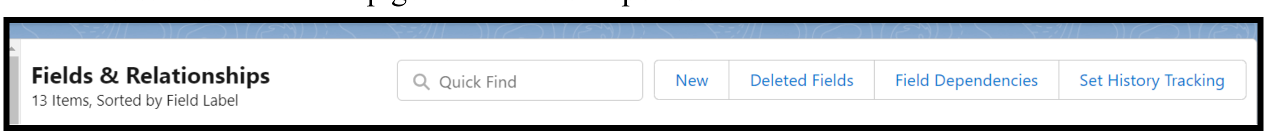


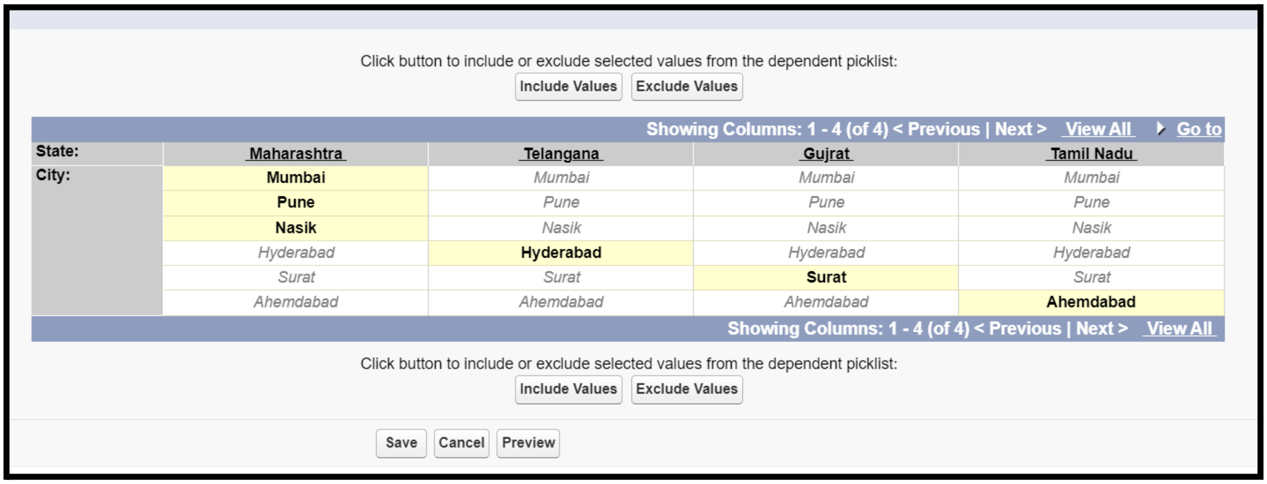


3. Fill the field label name Lead → Next → Next → Save.

Create the remaining Fields:
Follow the Above Steps to create the Field just change the Labels for Below Fields
Lead:(AutoNumber Created Field while creating Object) →L-{0000}
State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
City:Create the Picklist(Mumbai, Pune, Nashik)(Field Dependency)
Email: Create the Email Select the Data Type As Email (Email)
Phone:Select the Field Data type as (Phone)

In the Fields and Relationship go to the Field Dependencies





State:	Maharashtra	Telangana	Gujrat	Tamil Nadu
City:	Mumbai	Mumbai	Mumbai	Mumbai
	Pune	Pune	Pune	Pune
	Nasik	Nasik	Nasik	Nasik
	Hyderabad	Hyderabad	Hyderabad	Hyderabad
	Surat	Surat	Surat	Surat
	Ahemdabad	Ahemdabad	Ahemdabad	Ahemdabad

Activity2: For Object Buy

1. **Create Field for Buy**
2. **Create Property Type:** (Picklist) (Residential, Commercial, Industrial)
3. **Discount**:(Percentage As the Field Data Type)
4. **State:**Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
5. **City**:(Take Any City for Field Dependency)
6. **Annual Amount To Be Paid**

Activity3:

Create Field for Rent

1. **Rent:**(Auto Number while Creating the object)→ R-{0000}
2. **Rental City:**Select the Text as the Field Data Name(Any City)
3. **BHK type:**(Picklist) (1BHK, 2BHK,3BHK)

Activity4:

Create Field for Loan

1. **Loan Id**: Auto generated Field Take it as Autonumber LN-{0000}
2. **Interest Rate**: (Select the Field Data Type As Currency)
3. **Term**:(Select the Field Data type as Number)
4. **Annual Loan** Field create the Number as the field data type
5. **Total Loan Instalments:**(Field create the Number as the field data type)
6. **Loan Repayment**(Field create the Number as the field data type)
7. **Loan Amoun**(Select the Field data type as Formula)

8. **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: Profile

- A profile is a group/collection of settings and permissions that define what a user can do in salesforce.
- profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.
- You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

Standard profiles:

- By default salesforce provide below standard profiles.
- We cannot deleted standard ones
- .Each of these standard one includes a default set of permissions for all of the standard objects available on the platform.

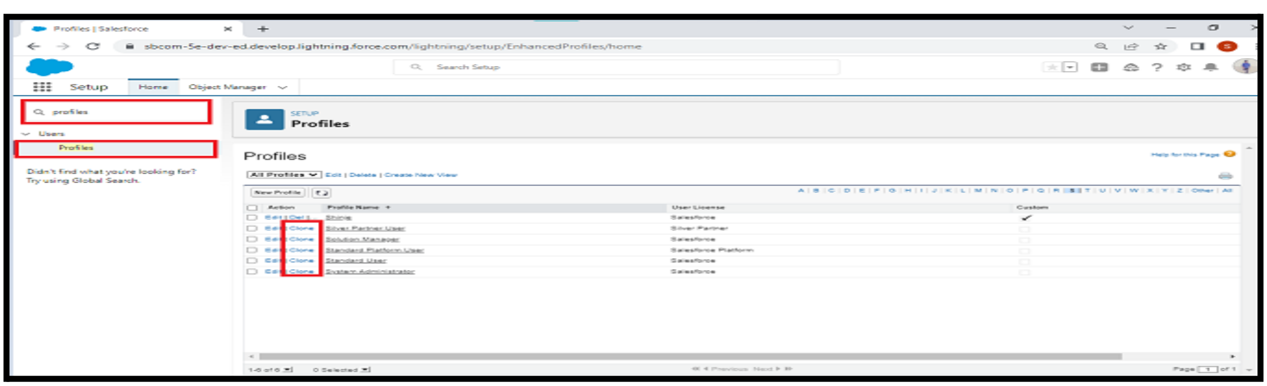
2. Custom Profiles:

- Custom ones defined by us.
- They can be deleted if there are no users assigned with that particular one.

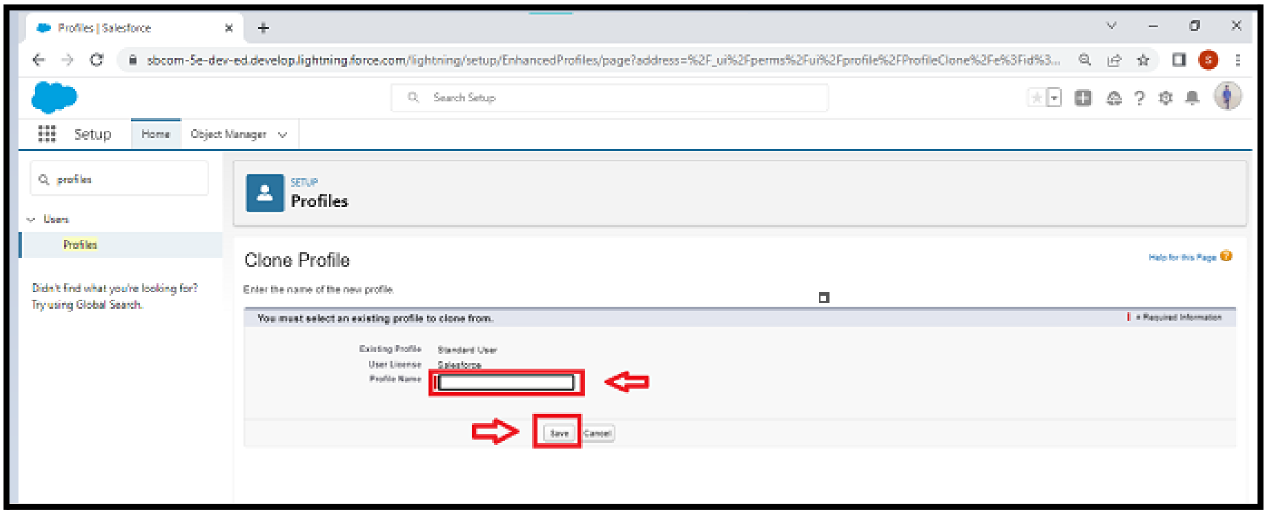
Activity 1:

To create a new profile:

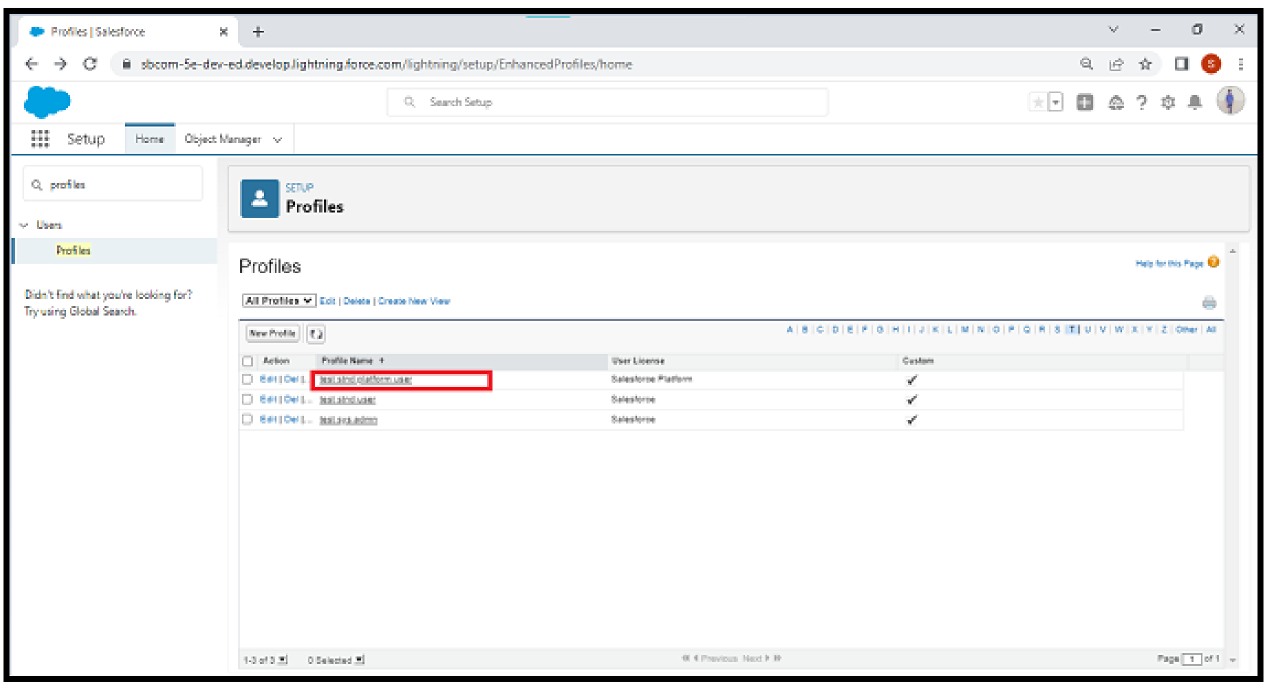
1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (standard user is preferable) → enter profile name → save



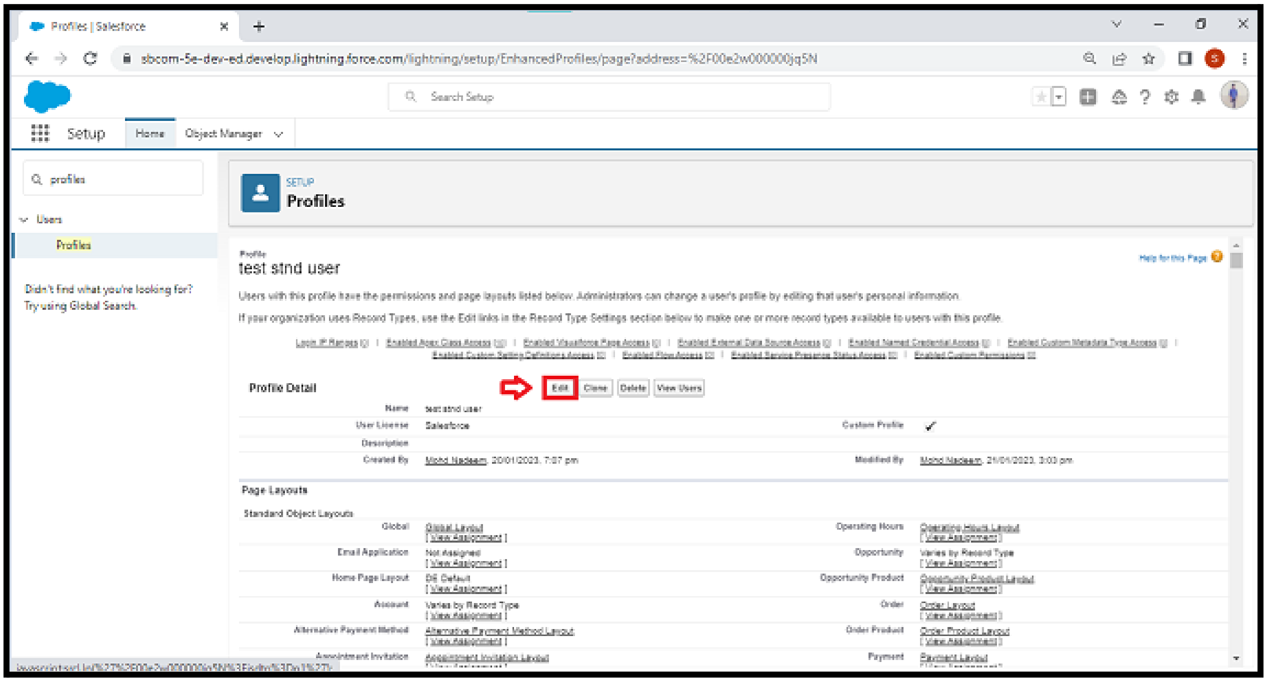
2. .Enter a Profile Name



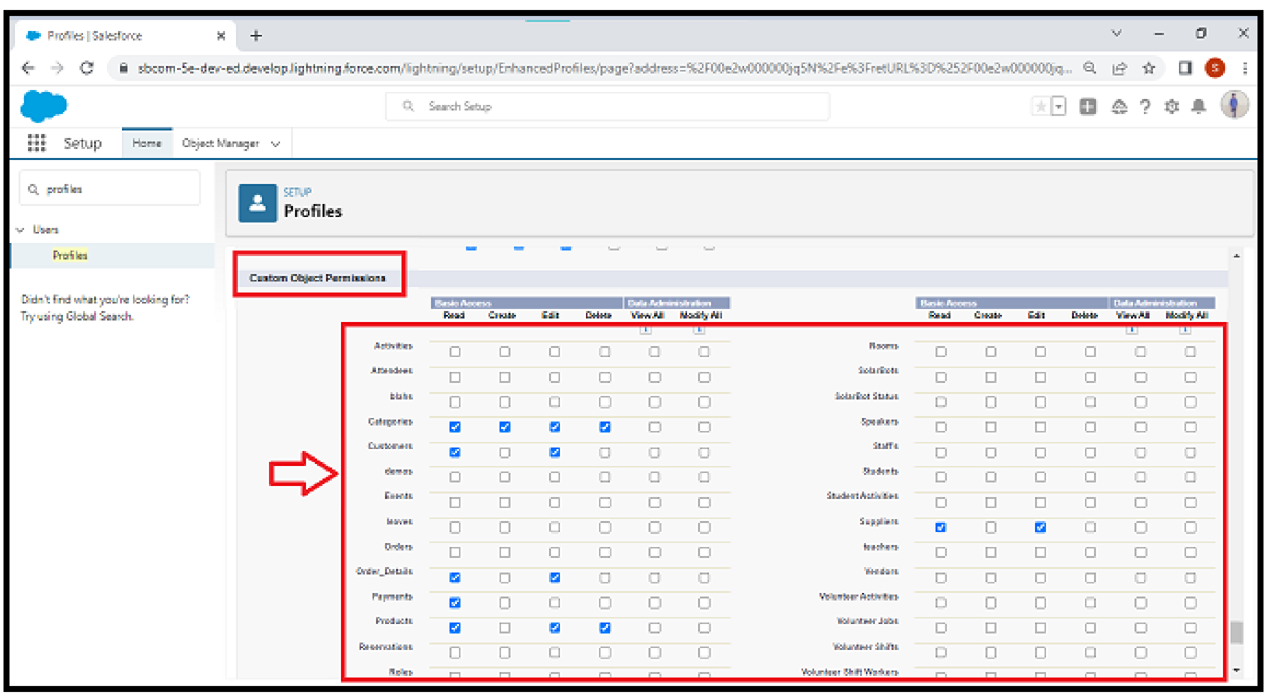
3. Click on the new created profile



4. While still on the profile page, then click Edit.



5. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile



6. Sales Manager →Standard user Profile , Marketing Executive1 and Executive2→Standard Platform User,Marketing Manager→Standard Platform User For

Activity 2:

Create Marketing

1. Then In The Profile Level Give Read and Create Access to Marketing Executive and Read, Create, Edit, Delete for the Marketing manager
2. Marketing Manager Should Have Access to Marketing Executive

Activity3-Sales:

1. In the Profile Level Sales Manager is Having Create, Edit, Delete
2. For Sales Rep1→ Read, Create, Edit
3. For Sales Rep2→Read, Create, Edit
4. For Sales Rep3→ Read only.

Milestone7-New User

- A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.
- Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

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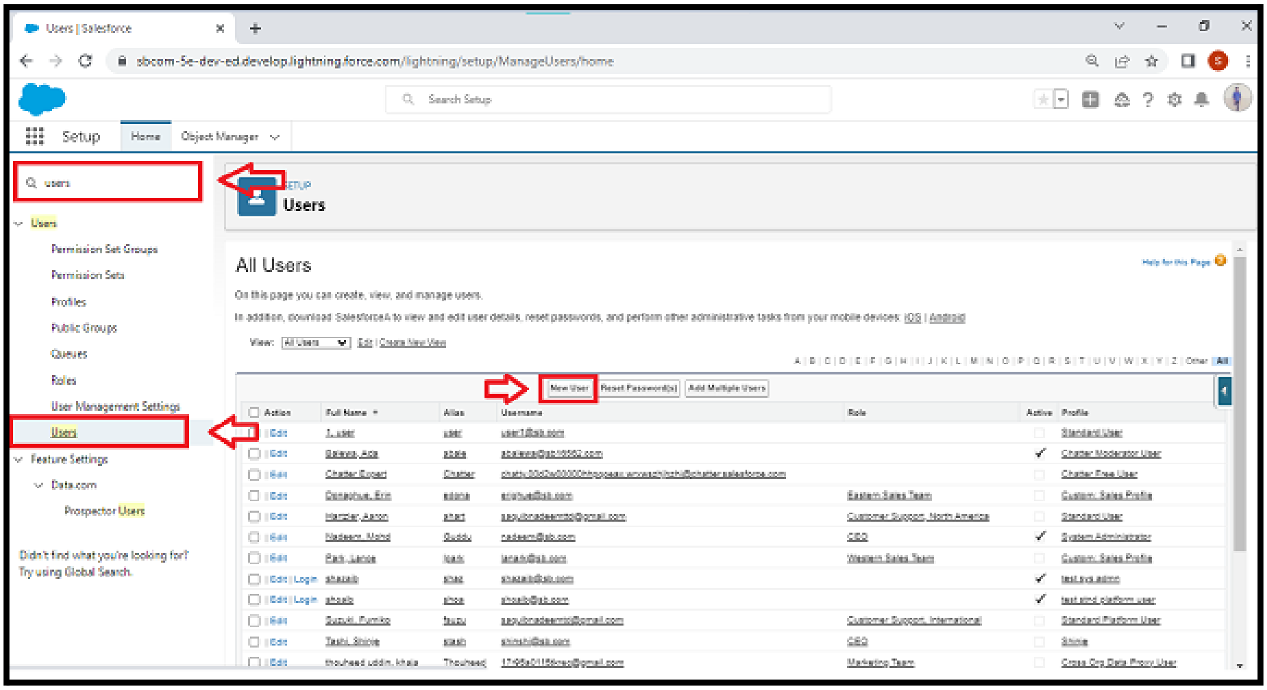
Activity 1:

Create User

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



2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.

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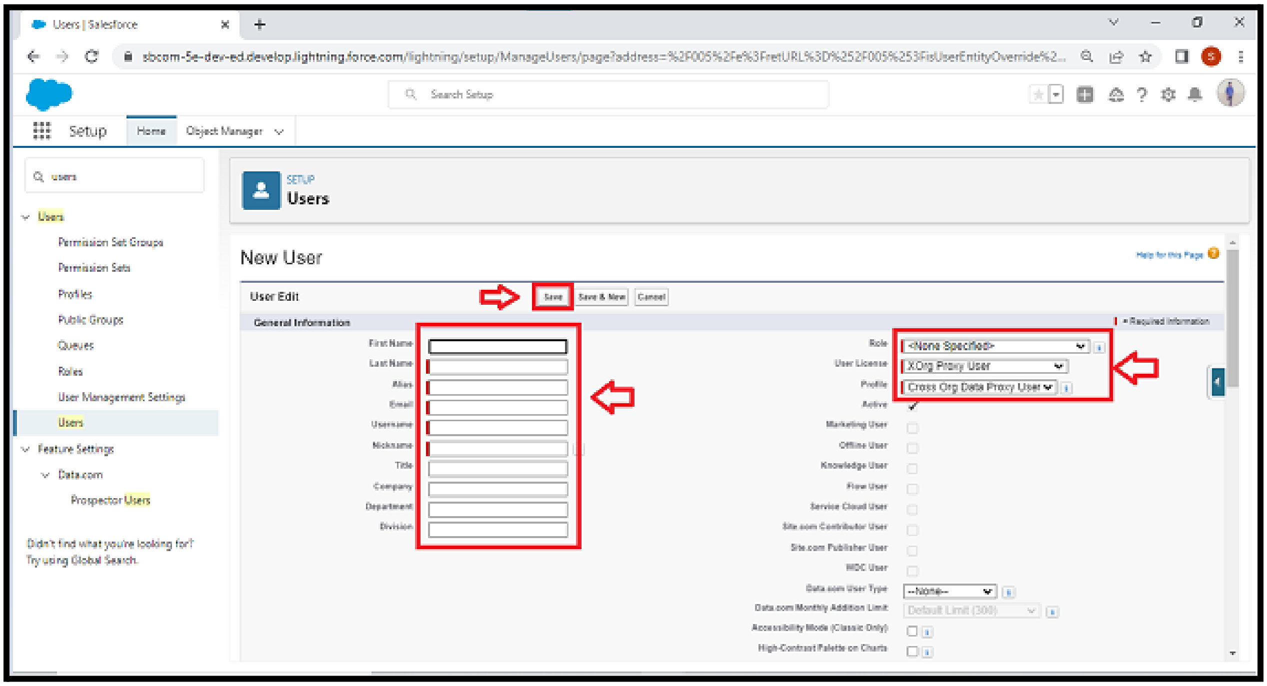


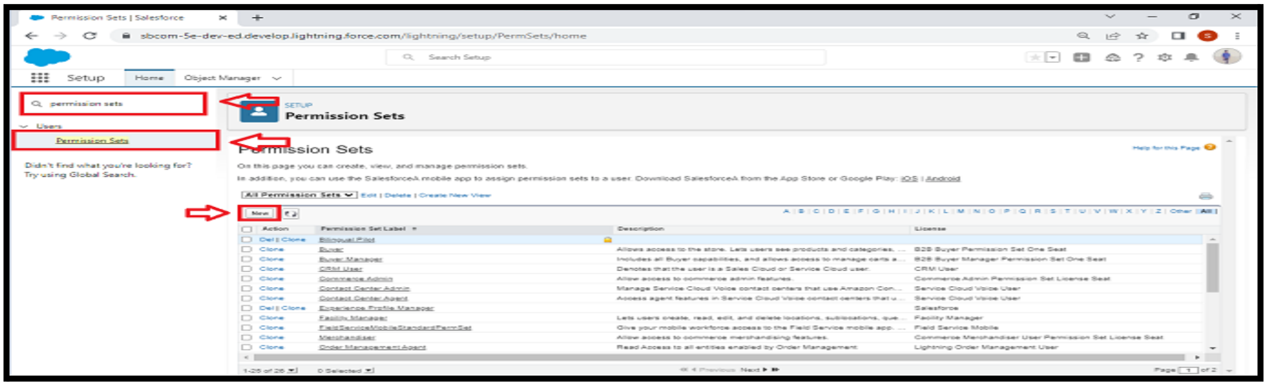
Milestone8-Permission Set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

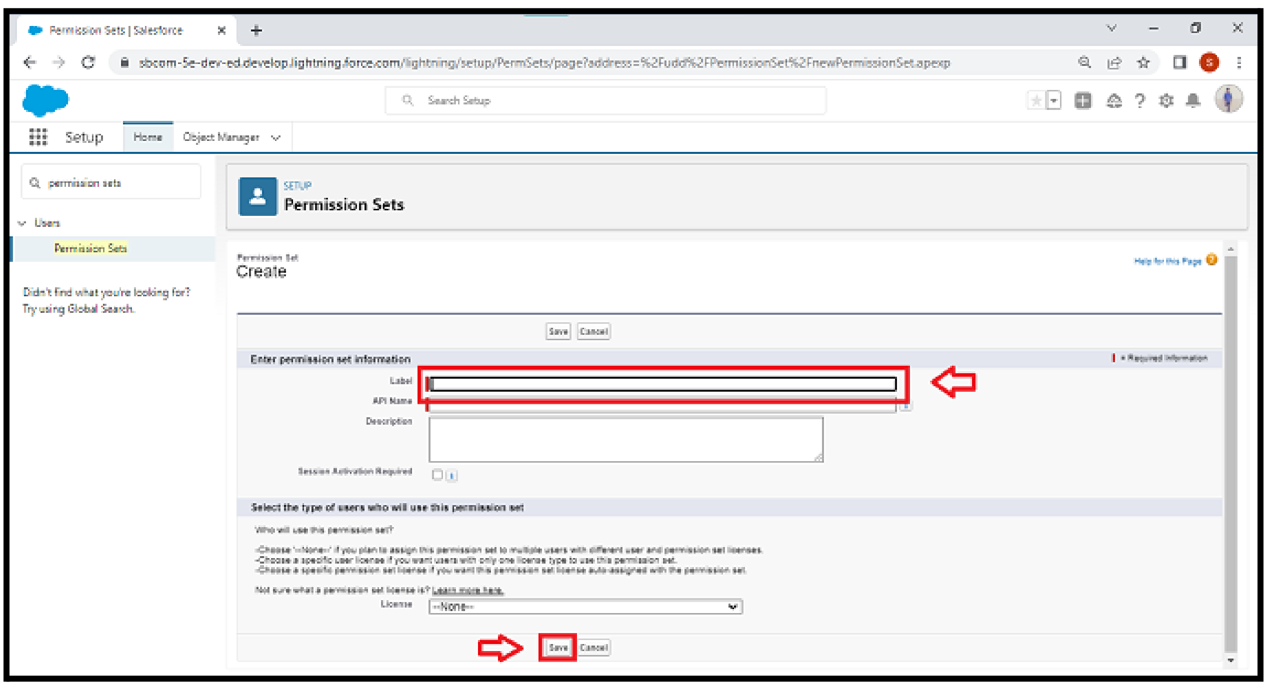
Activity 1:

Create the Permission Sets

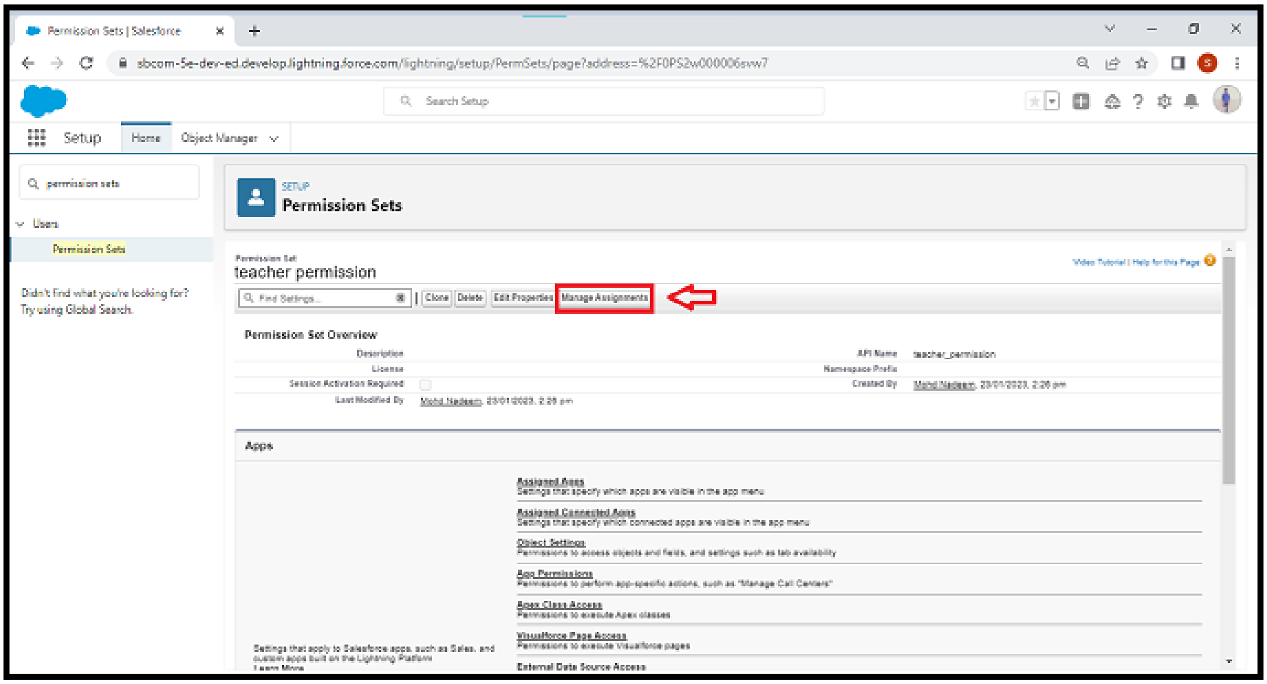
1. Go to setup → type "permission sets" in quick search → select permission sets → New.



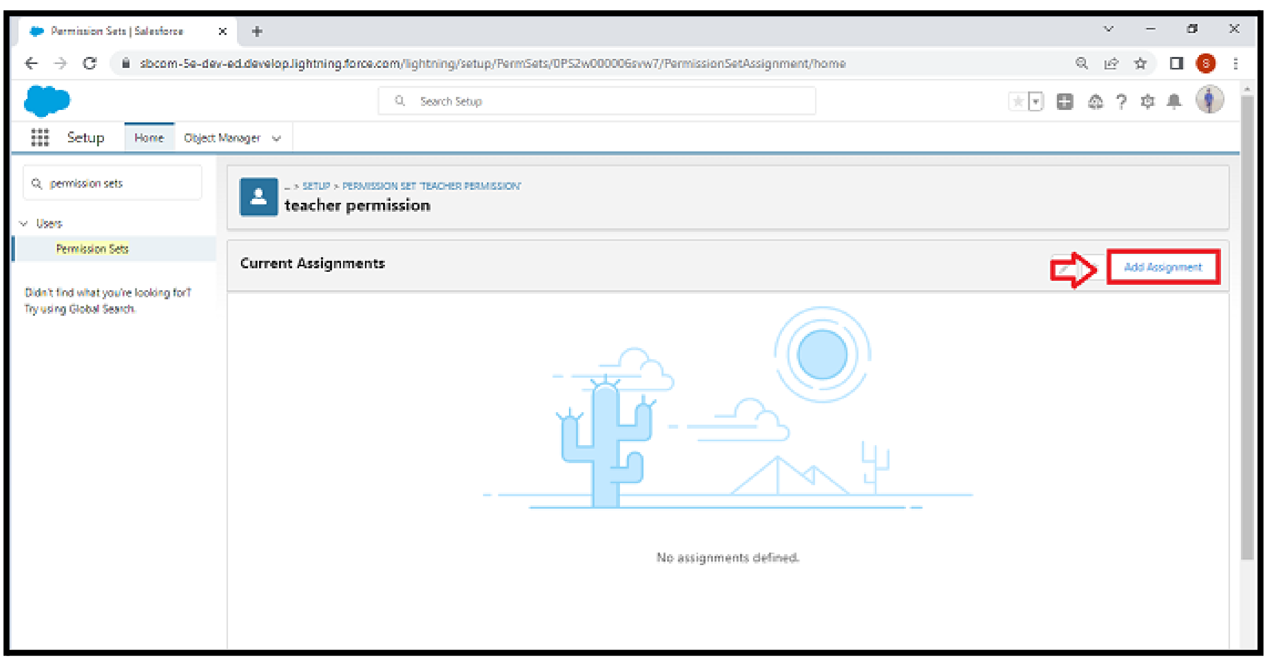
2. Enter the label name → save.



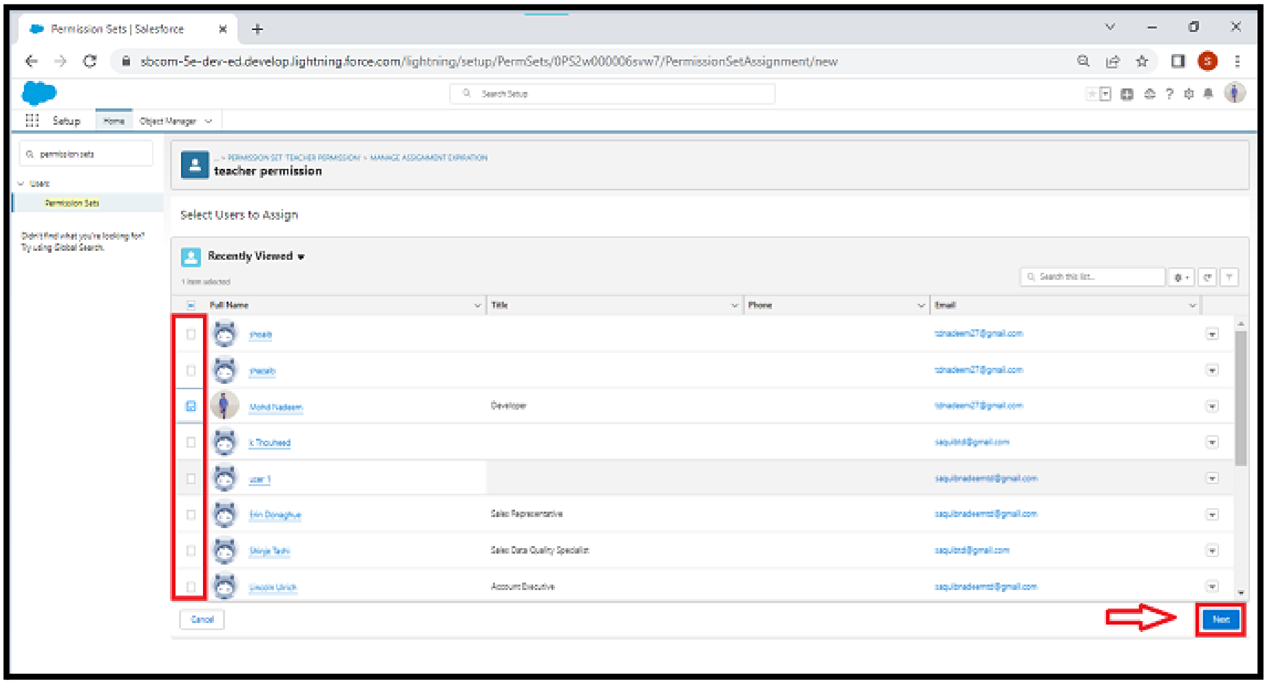
3. After saving the permission click on the Manage assignment



4. Now click on the Add Assignment



5. Now select the users and click on save



6. Go to permission set and add the access For Sales Rep3 give Access with Create permission for the <u>User</u>

Milestone 9: Setup For OWD

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

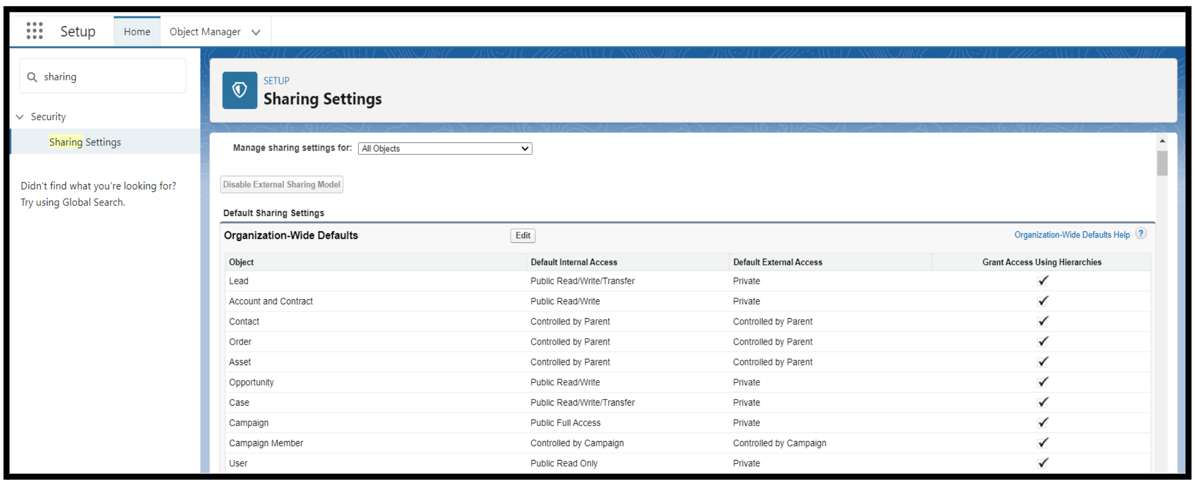
Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

- Public Read/Write/Transfer (only available of Leads and Cases)
- Public Read/Write
- Public Read/Only
- Private

Activity1:

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 **Lead, Rent** 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

Activity 2:

Marketing

1. Create the Record Level OWD Setting give it As A Private To Marketing manager And Marketing Executive

Sales:

1. Sale Manager OWD is Set As Private similarly sales Rep1, Sales Rep2 same OWD for them

Milestone10-Report

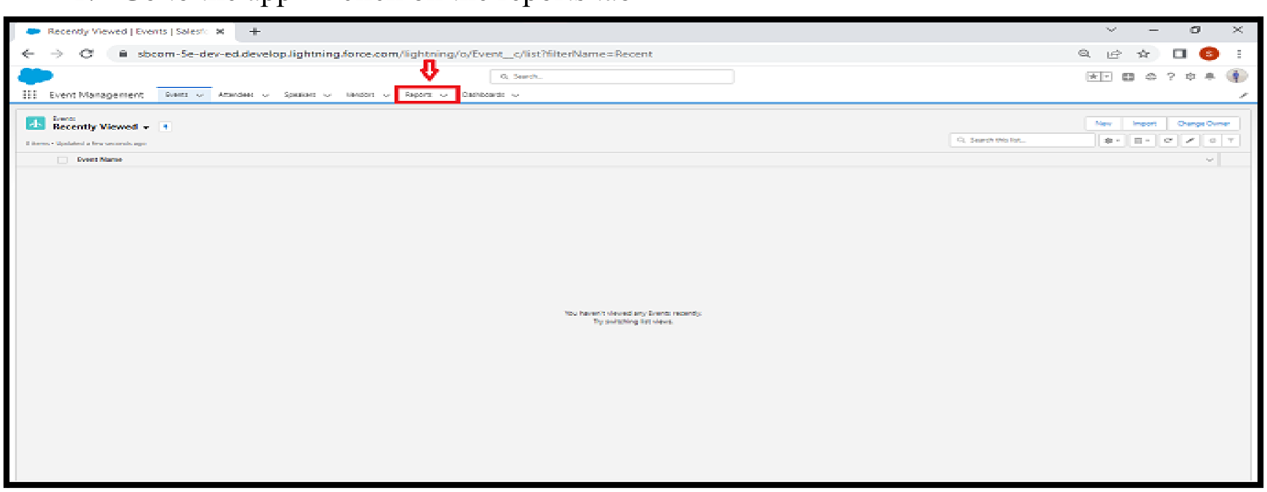
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce
Tabular
Summary
Matrix
Joined Reports

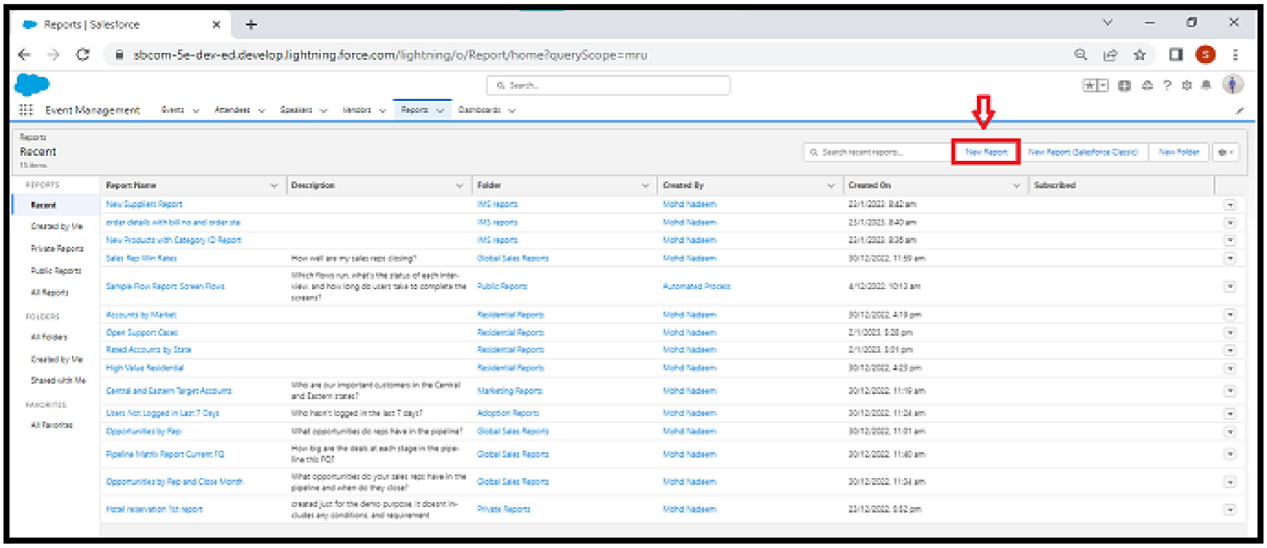
Activity 1:

Create Report-

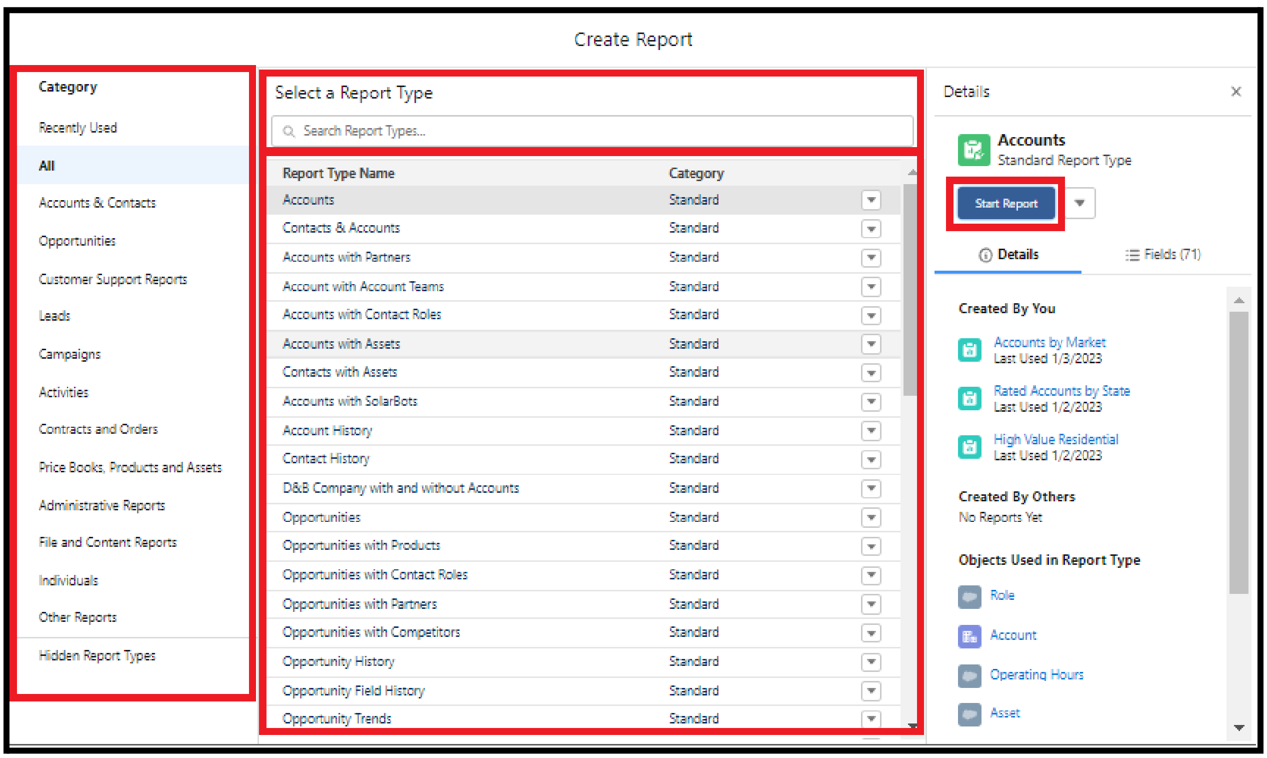
1. Go to the app → click on the reports tab



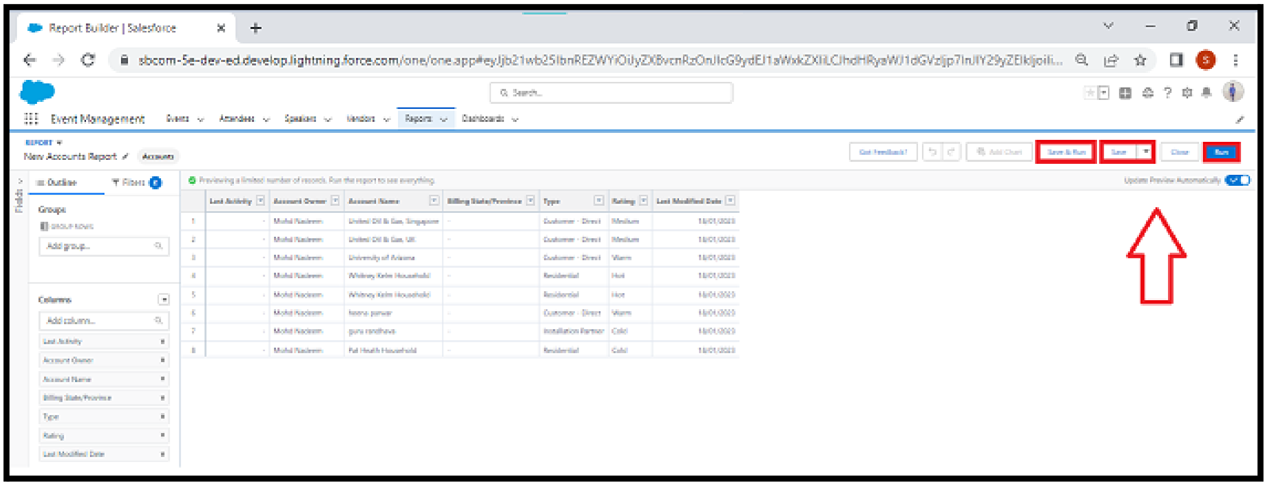
2. Click New Report



3. Select report type from category or from report type panel or from search panel → click on start report.



4. Customize your report, then save or run it.



Create Report for following Condition

1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the Property
2. The Condition should be Like Loan Amount >= to 5000$

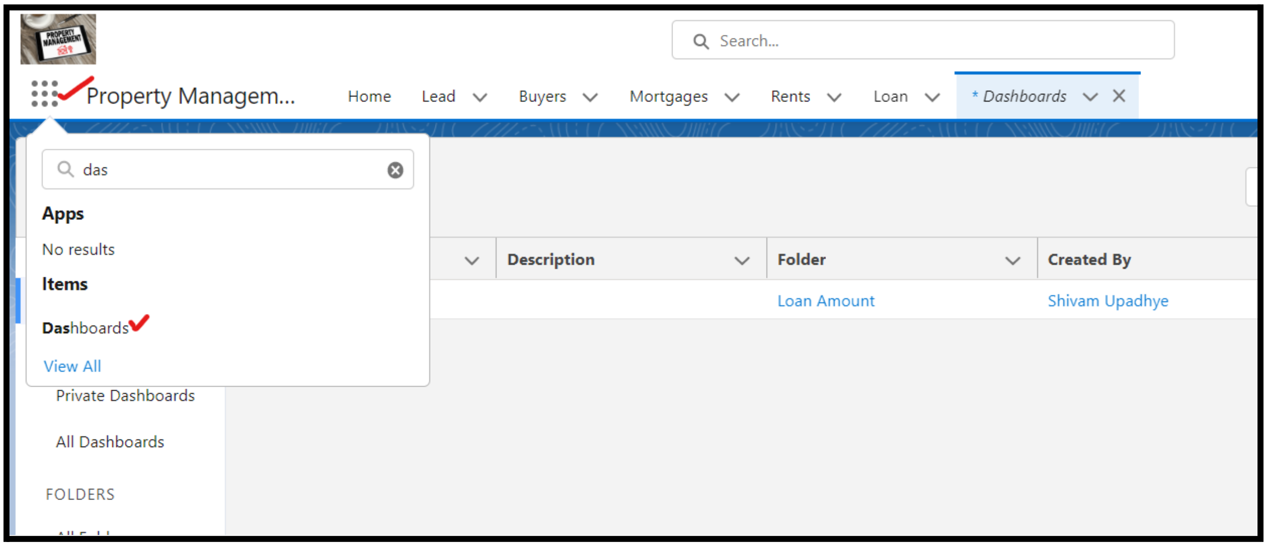
<u>Milestone11-Dashboards</u>

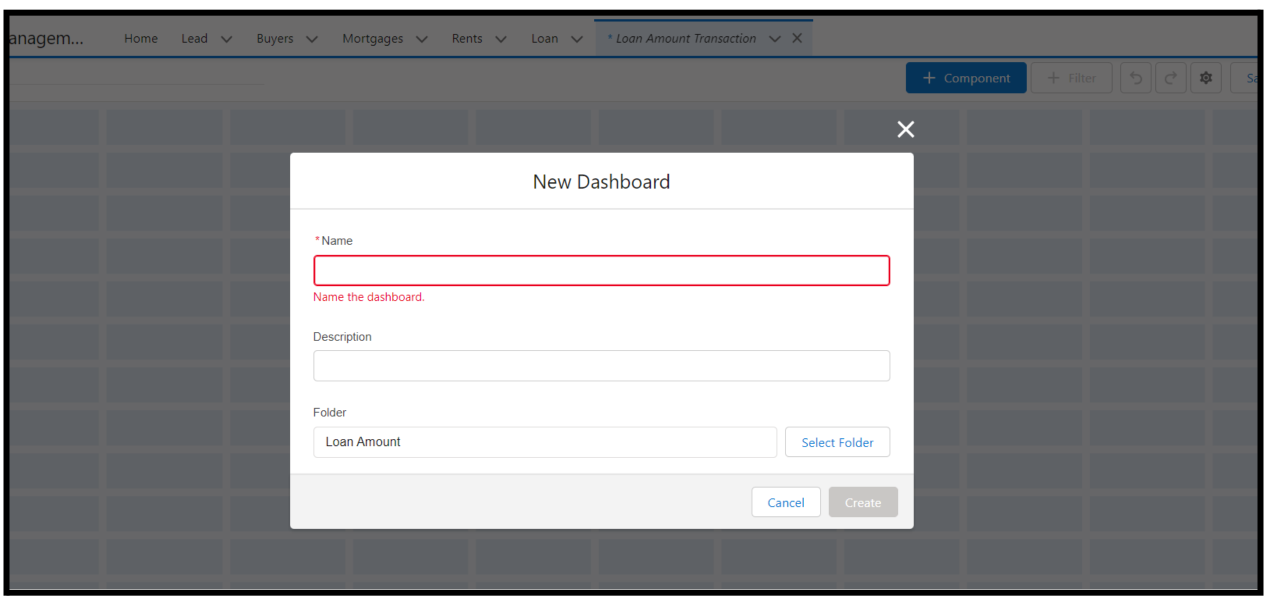
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Activity1:

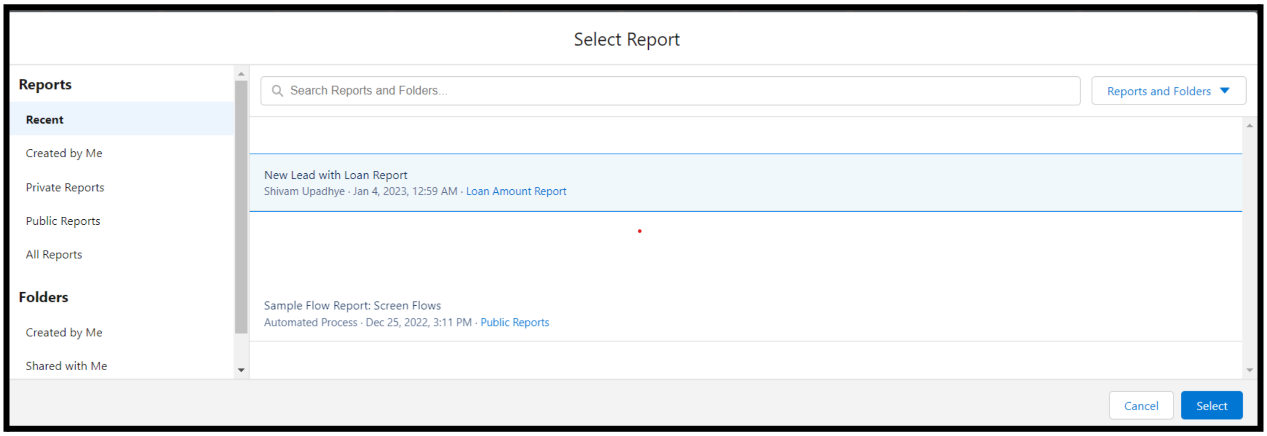
Create dashboards

1. Go to the App Launcher and select the Dashboards
2. Select add component

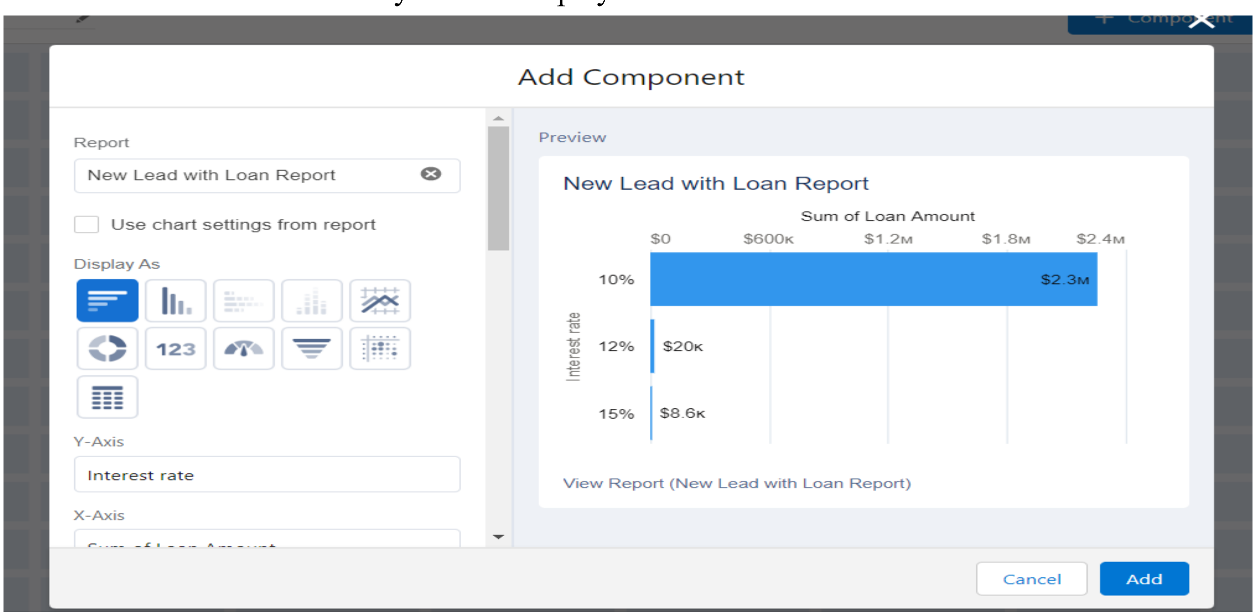


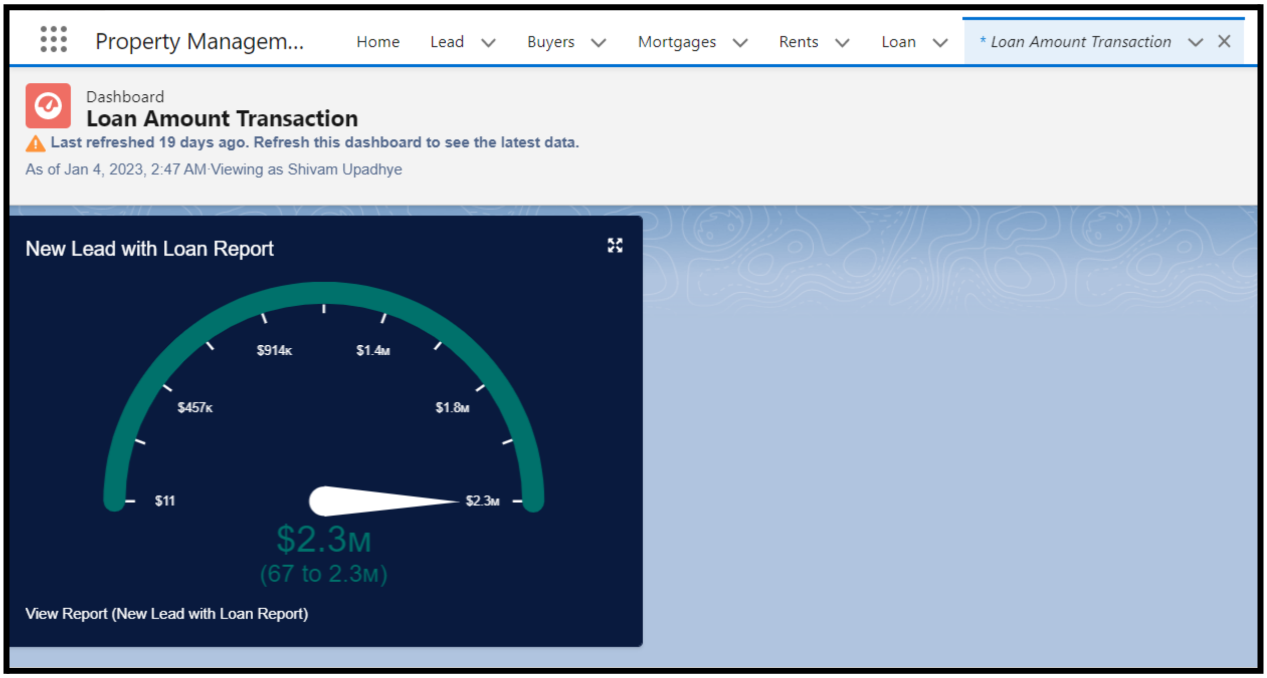


3. Select the folder select the following option new lead with loan Amount



4. Select in which format you want display chart





Activity2:

Create Dashboard

1. Create the Dashboard for the Same Take Any Type of Dashboard(Chart) And Display It on The App Home Page