PROPERTY MANAGEMENT

INTRODUCTION:

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

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
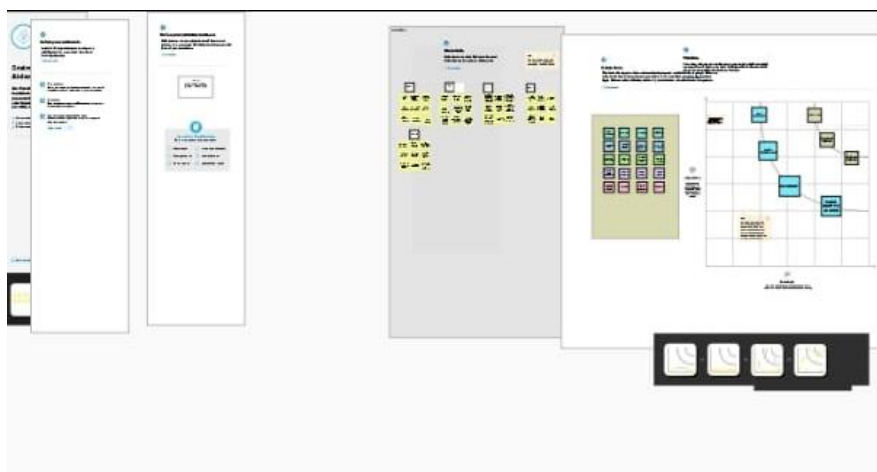
Purpose:-

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

Empathy Map:-

Ideation & Brainstorming Map:

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
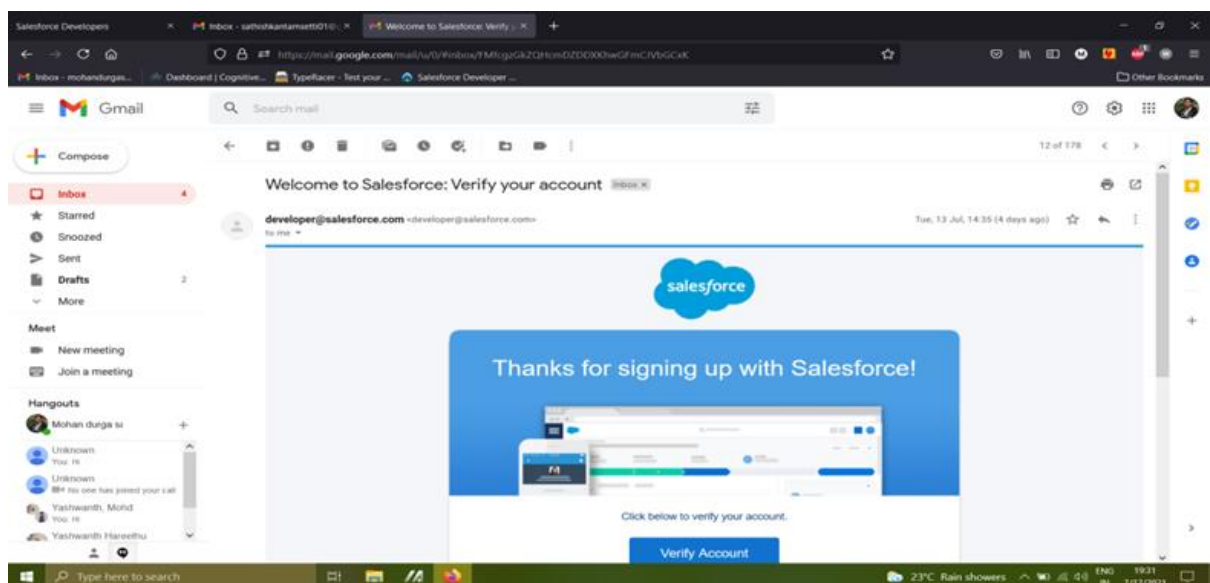

2. Login To Your Salesforce Account

1- 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.
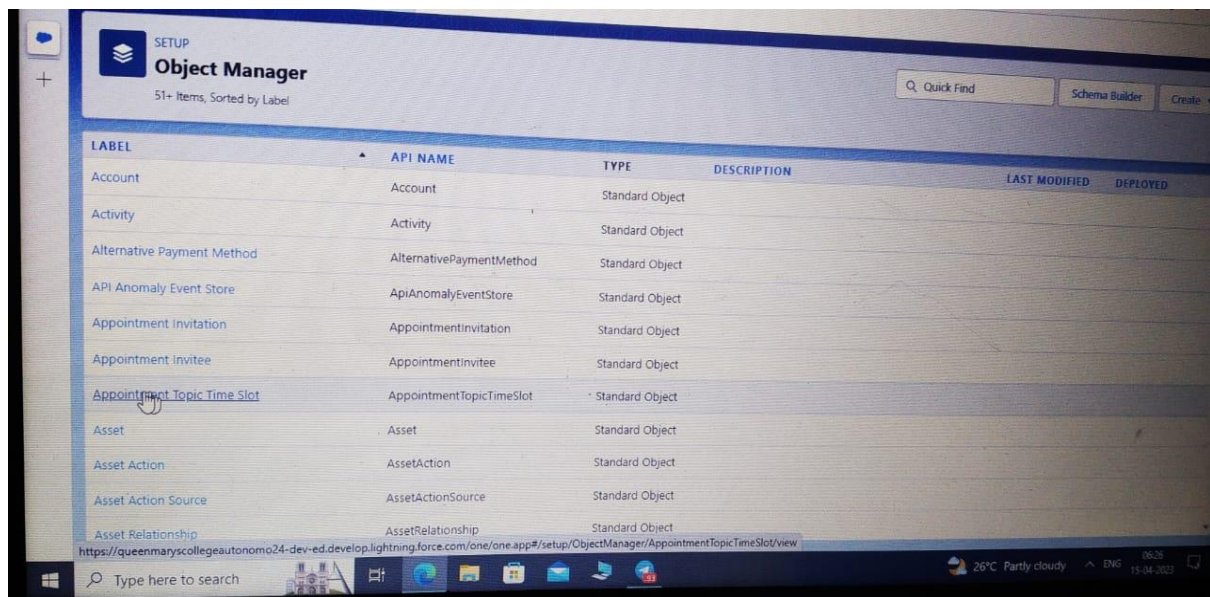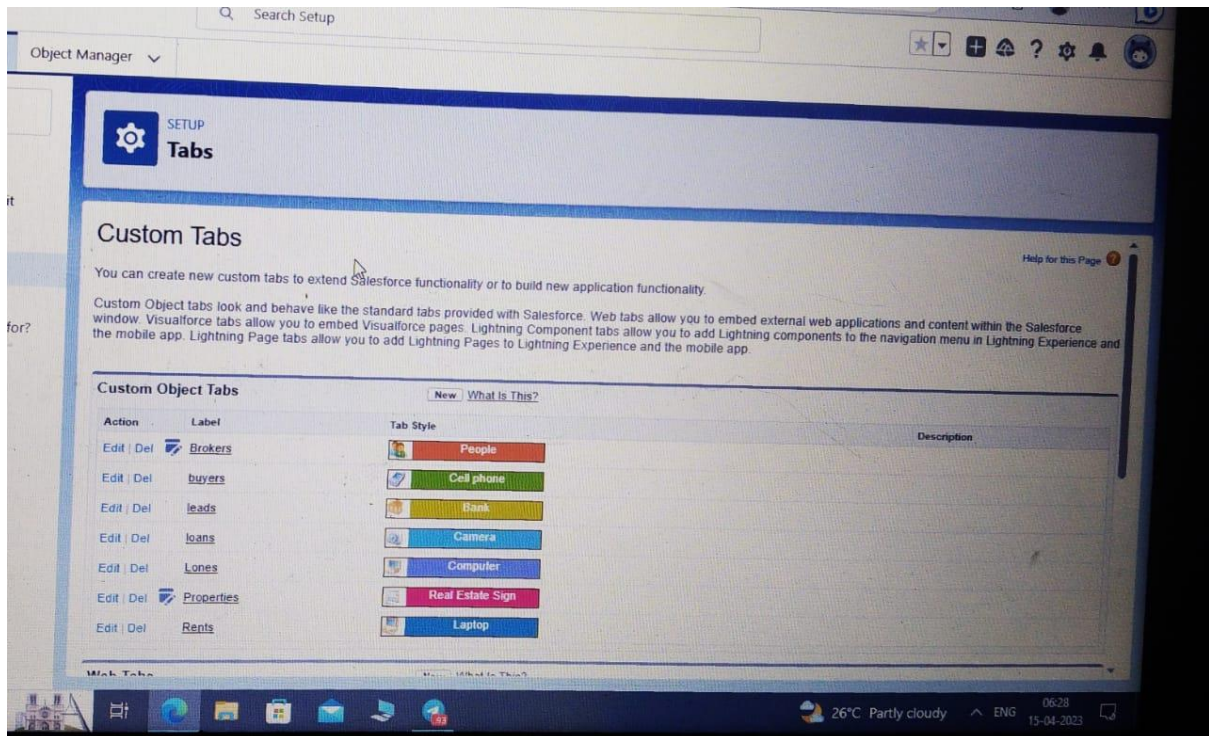

2-Tab

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

3-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.
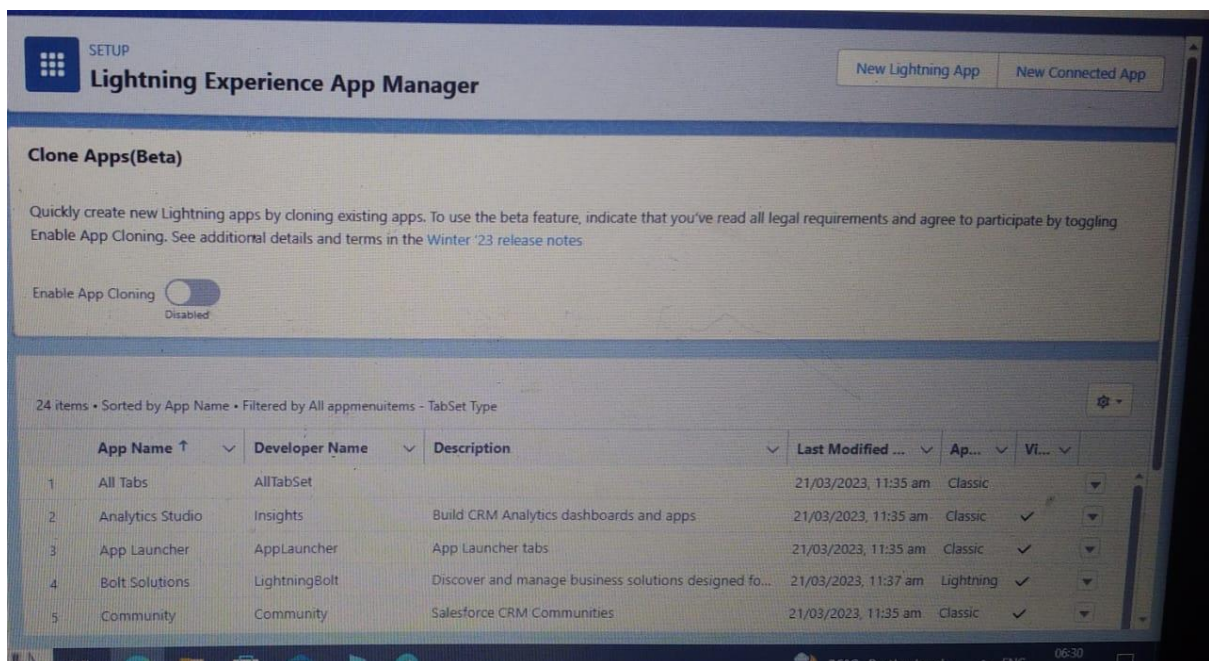
4-Fields

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.
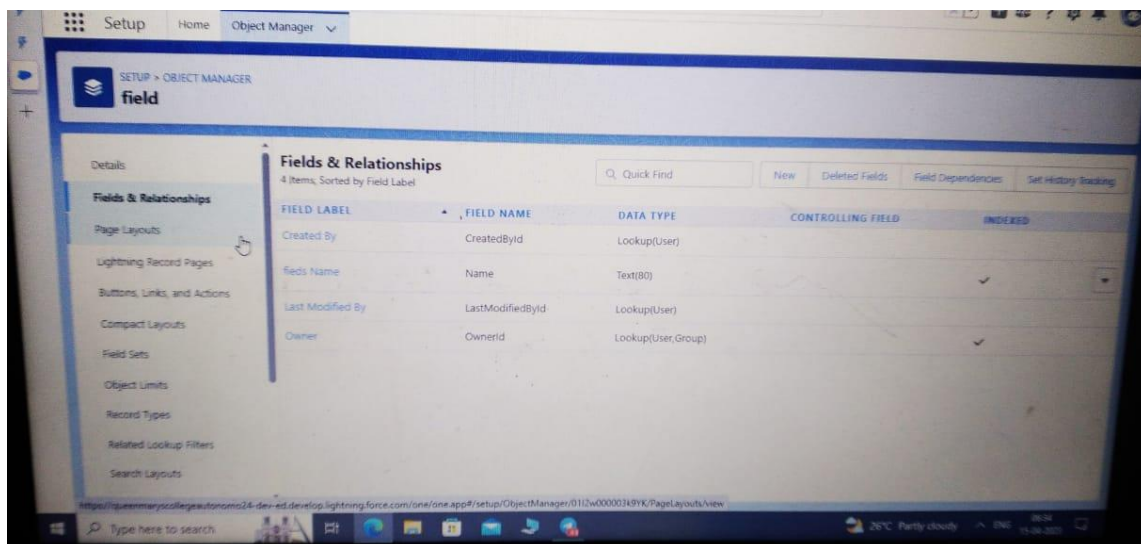
For Object Buy

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

5- 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.

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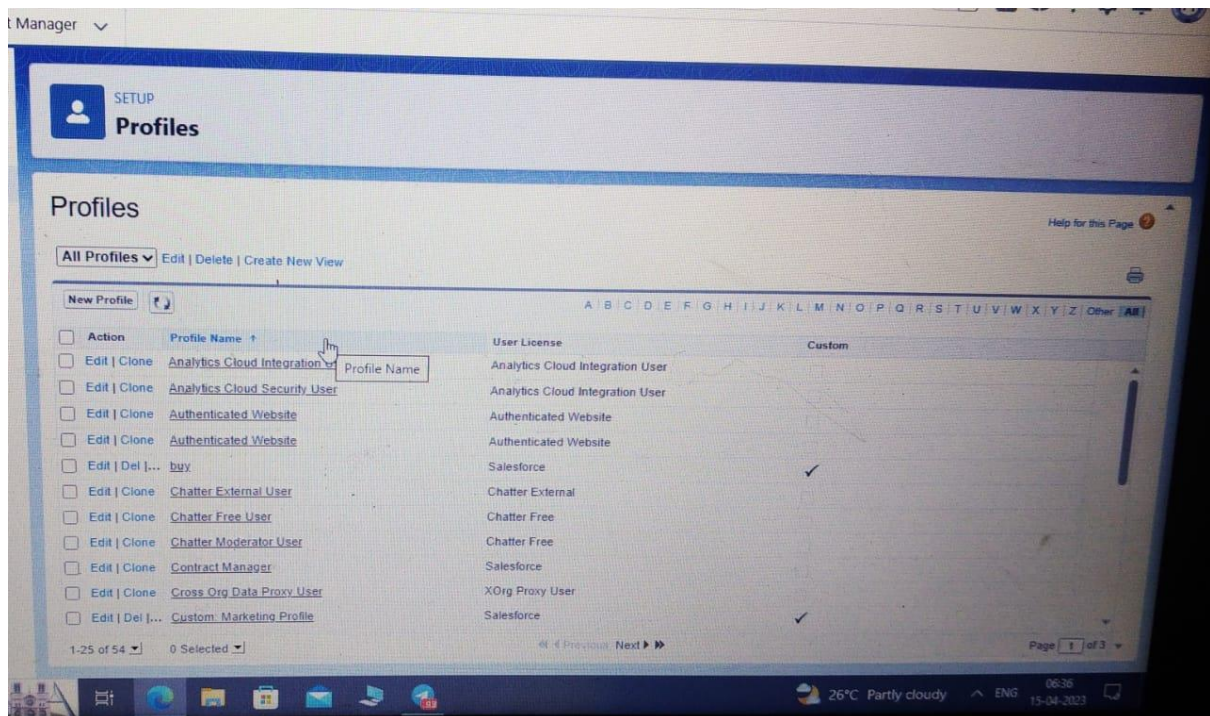

6-New User

- ➢ 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.
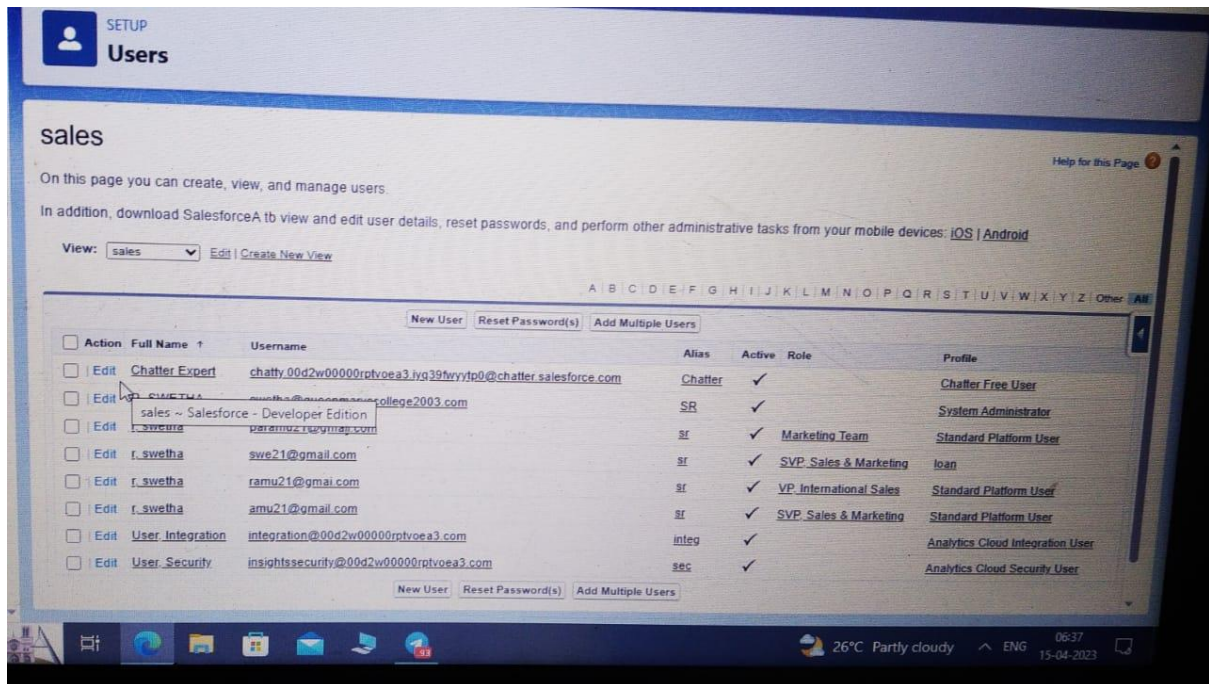
7-Permission Set

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.
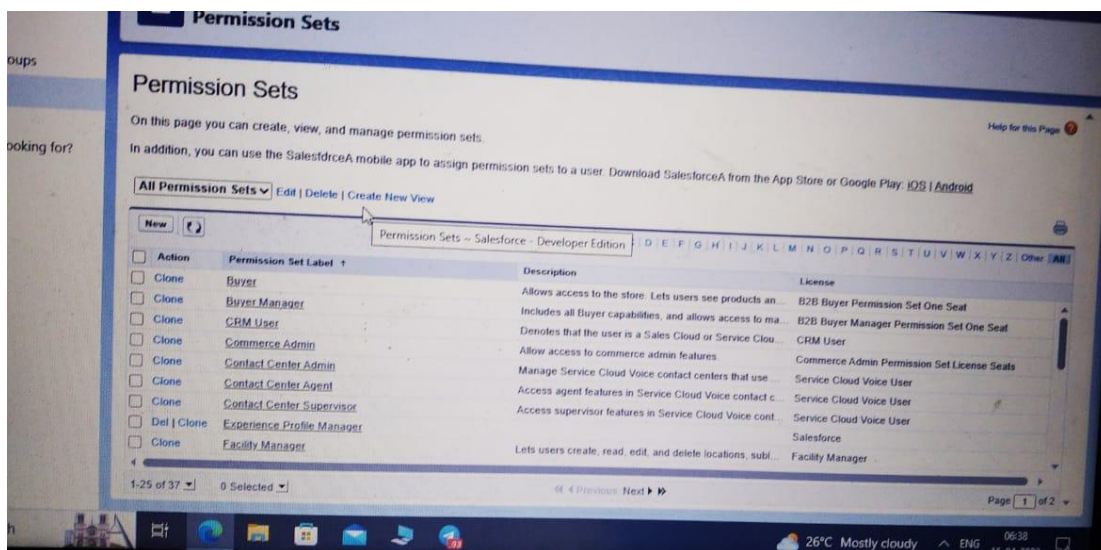
8- Setup For OWD

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
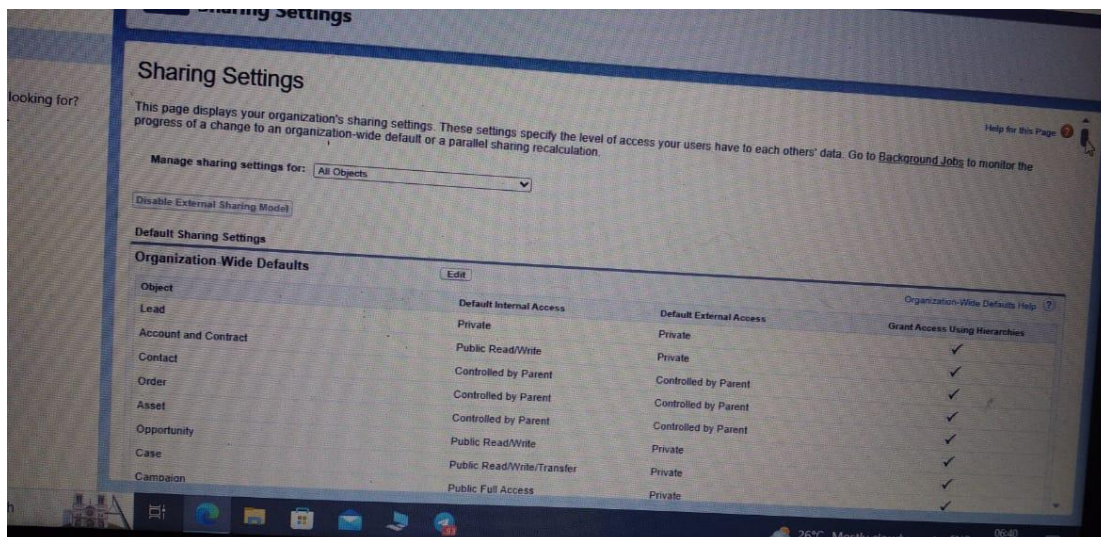
9-Report

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

10-Dashboards

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.

Trailhead Profile Public URL
Team Lead - https://trailblazer. me/id/qsneka
Team Member 1 - https://trailblazer.me/id/swetr25
Team Member 2 - http://trailblazer.me/id/thuls26
Team Member 3- https://trailblazer.me/id/ssiv anantham3
Team Member 4-

ADVANTAGES & DISADVANTAGE:

Advantage of using property management system

- ➢ Increase time available for backlogged tasks
- ➢ Most importantly
- ➢ Reduce time spent on admin
- ➢ Free up time for yourself.
- ➢ Easy maintenance monitoring.
- ➢ Easy payments from tenants and contractors.
- ➢ Data tracking.
- ➢ Property management.
- ➢ 24*7 support & customer loyalty.
- ➢ Quick inspection.
- ➢ Tenant screening.
- ➢ Enhances visibility.

Disadvantages of using a property management software

- ➢ Time-consuming if you choose the wrong system. ...
- ➢ Might seem expensive for a small business. ...
- ➢ Training (cost and time).

Salesforce cons

- ➢ Expensive.
- ➢ You have to pay for add-ons to get the most out of the software.
- ➢ Configuration and setup is complex and time-consuming.
- ➢ Cluttered interface makes navigation and simple tasks unnecessarily complex.
- ➢ The learning curve never seems to end.
- ➢ Customer support has a poor reputation.

APPLICATIONS

- ➢ Software application for the operations of hospitality accommodations and commercial residential rental properties.
- ➢ Assist owners in creating budgets
- ➢ Advertise rental properties
- ➢ Qualify tenants
- ➢ Collect rent.
- ➢ Customer relationship management (CRM) platform
- ➢ Track emails, calls
- ➢ Set tasks to connect with the right buyers
- ➢ Sellers
- ➢ Renters at the right time

CONCLUSION:

Salesforce Consultants help organizations optimize and implement Salesforce products and services that are scalable and cost-effective. A Salesforce consultants responsibilities include configuration and project management throughout the project lifecycle.
Business processes connect Salesforce to other custom and 3rd-party applications, creating a chain of software linking critical business data and operations across your enterprise. Salesforce offers a lot of different products that will work seamlessly with the CRM. This includes a marketing product that will automate your customer journey and email marketing campaigns. It also includes a fully customizable customer support solution.

FUTURE SCOPE:

This prompted Salesforce and other training providers to double down on entry-level Salesforce training programs such as Pathfinders and Clicked, with many of these programs citing the demand of "9.3M New Jobs by 2026" from the IDC paper in 2021.
A future runs as asynchronously. You can call a future method for executing long-running operations, such as callouts to external Web services or any operation you'd like to run in its own thread, on its own time. Each future method is queued and executes when system resources become available

Thank you