

Project Report Template

Property management application using Salesforce

1. Introduction

1.1 Overview

- ❖ First, we had finished an Empathy map and Brainstorming & Ideation and submit it on GitHub
- ❖ We had created a developer account in Salesforce. Then we had created object, Tab, the lightning App, Fields, Profile, User, Permission set, OWD Setting, Report and Dashboards
- ◆ **Object Creation**
 - We had click on the gear icon and click on the object manager tab and next click on Custom object
 - The Custom objects are Lead, Buy, Rent and Loan
- ◆ **Tab Creation**
 - We had created tabs for Custom objects
- ◆ **Application Creation**
 - ❖ We searched app manager in quick find box and selected new lightning app and we had finished the following steps: App Details & Branding→Utility Items→Next→Add Navigation Items (add tabs Lead, Buy, Rent, Loan)→Next→Add user profile (System Administrator, Salesforce Platform user, Standard user)→Save & Finish
- ◆ **Field Creation**
 - ❖ We created the following fields
 - **Field for Lead**
 - Lead
 - State
 - City
 - Email
 - Phone
 - **Field for Buy**
 - Property Type
 - Discount
 - State
 - City
 - Annual amount to Be paid
 - **Field for Rent**
 - Rent
 - Rental City
 - BHK Type
 - **Field for Loan**
 - Loan Id
 - Interest Rate
 - Term

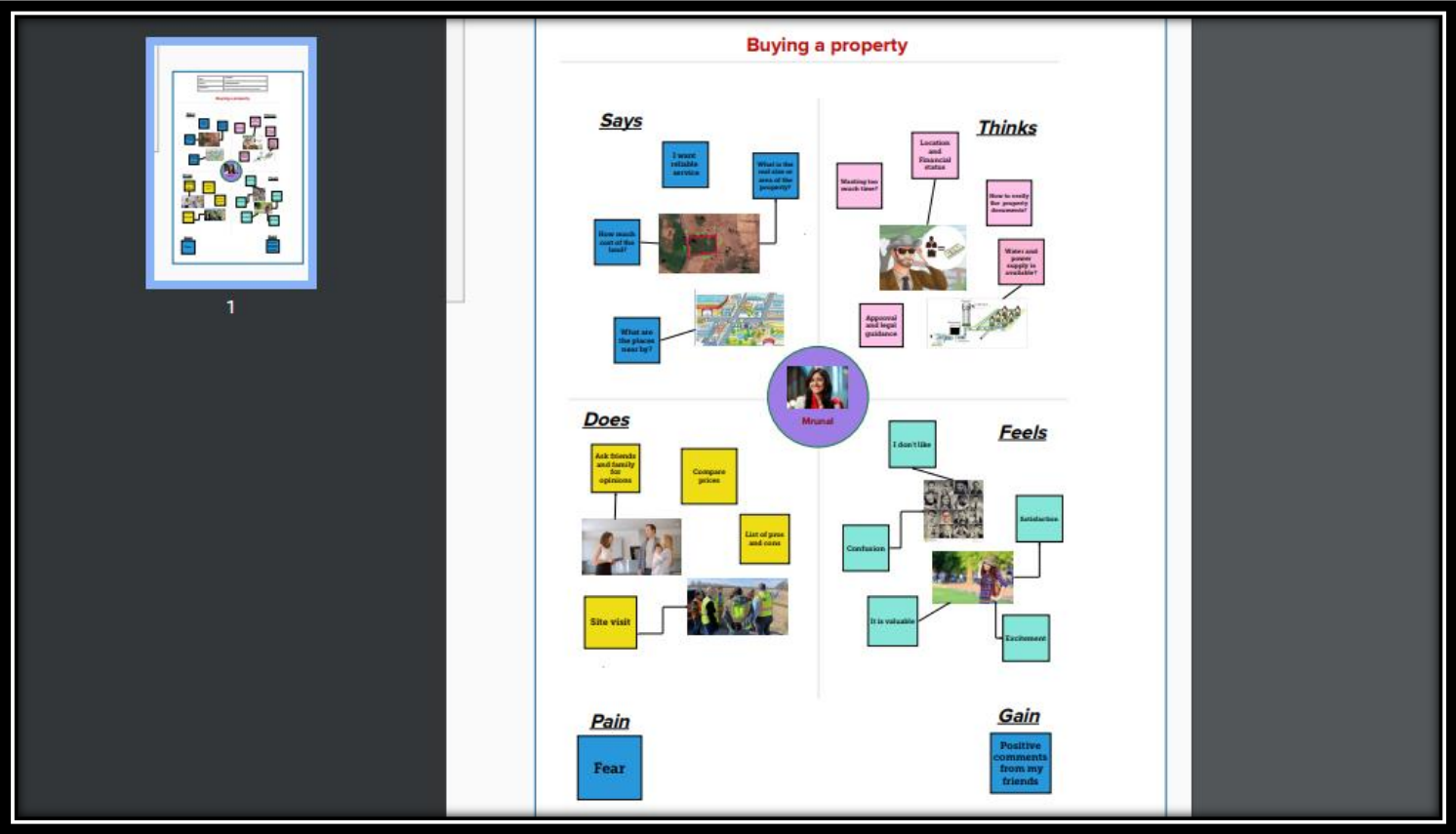
- Annual Loan
 - Total Loan Instalments
 - Loan Repayment
 - Loan Amount
- ♦ **Profile and User Creation**
 - ❖ We created profiles and users for Marketing Manager, Marketing Executive, Sales Manager, Sales Rep1, Sales Rep2, Sales Rep3
- ♦ **Permission Set Creation**
 - ❖ We searched permission set in quick find box and selected it, then we had click new enter detail, save it→click manage assignment→add assignment→select users and save
- ♦ **OWD Setting Creation**
 - ❖ We had followed these steps for creating OWD setting:
 - * Find sharing settings→Click edit in the Organization-Wide Default area→Find Custom objects (Lead, Buy, Rent, Loan)→Click Edit and from Dropdown select private for internal and external
 - * Same procedure to create Marketing Manager, Sales Manager, Sales rep1, Sales rep2, Sales rep3
- ♦ **Reports Creation**
 - ❖ From the Reports tab, we clicked new reports and selected the reports type loan for the report, then we had clicked create and included all fields. Next saved it
- ♦ **Dashboards Creation**
 - ❖ We had followed these steps:
 - * Go to App launcher→Search Dashboards and select it→Add component→Enter name new lead with loan amount→Select Display Chart

1.2. Purpose

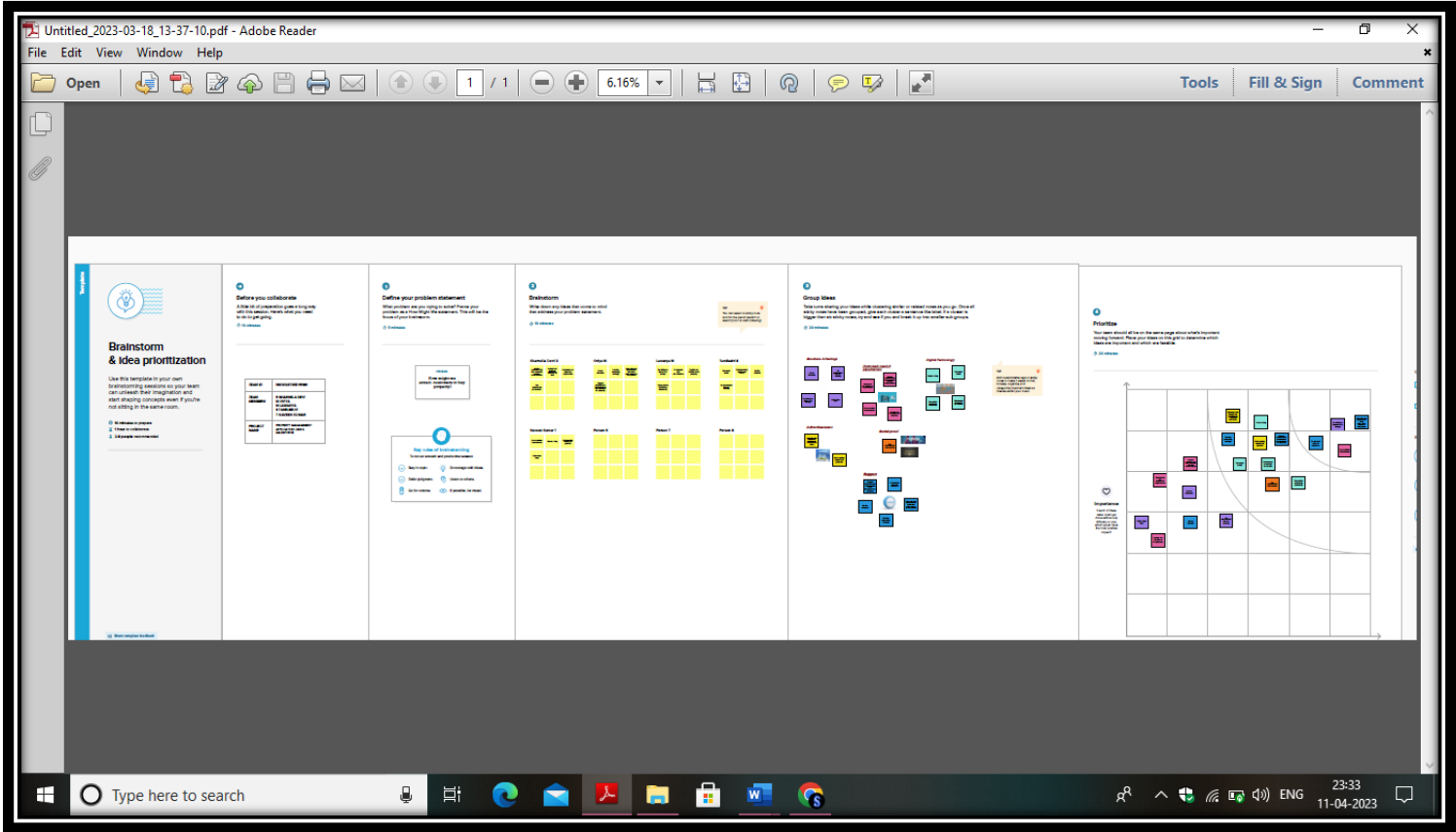
- ❖ The Property management application using salesforce is used for buyers can order his requirements and get the appropriate details of the property
- ❖ It helps businesses keep track of customer interactions
- ❖ What I have learned from this project
 - ✚ Real Time Salesforce Project
 - ✚ Object & Relationship in Salesforce

2. Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming



3. Result

3.1 Data Model:

Object Name	Fields in the Object	
Lead	Field Label	Data type
	Lead	Auto Number
	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
Buy	Field label	Data type
	Property type	Picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
	Annual amount	Currency

Rent	Field label	Data type
	Rent	Auto number
	Rental City	Text
	BHK	Picklist
Loan	Field label	Data type
	Loan Id	Auto number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total loan Instalments	Number
	Loan Repayment	Number
	Loan Amount	Formula

3.2 Activity & Screenshot

❖ Object

The screenshot shows the Salesforce Object Manager interface in a web browser. The browser address bar displays the URL: `Ingponneri-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes a search bar labeled "Search Setup" and navigation tabs for "Setup", "Home", and "Object Manager". The "Object Manager" dropdown menu is open, showing options: "+ New Object", "RECENT RECORDS", "Buy", "Loan", "Rent", and "Lead". The main content area displays a table of objects with columns: LABEL, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various standard objects such as Account, Activity, Alternative Payment Method, API Anomaly Event Store, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, and Asset Action Source. A "Quick Find" search bar is located in the top right corner of the main content area. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 09:44 on 12-04-2023.

LABEL	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Standard Object			
Activity	Standard Object			
Alternative Payment Method	Standard Object	AlternativePaymentMethod		
API Anomaly Event Store	Standard Object	ApiAnomalyEventStore		
Appointment Invitation	Standard Object	AppointmentInvitation		
Appointment Invitee	Standard Object	AppointmentInvitee		
Appointment Topic Time Slot	Standard Object	AppointmentTopicTimeSlot		
Asset	Standard Object	Asset		
Asset Action	Standard Object	AssetAction		
Asset Action Source	Standard Object	AssetActionSource		

❖ Tabs

The screenshot shows the Salesforce Custom Tabs interface in a web browser. The browser address bar displays the URL: `Ingponneri-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home`. The page header includes a search bar labeled "Search Setup" and navigation tabs for "Setup", "Home", and "Object Manager". The "Custom Tabs" section is active, displaying a "Custom Object Tabs" table and a "Web Tabs" section. The "Custom Object Tabs" table lists tabs for Credit card, Building, Real Estate Sign, and Building Block. The "Web Tabs" section indicates that no web tabs have been defined. A left sidebar contains a "Quick Find" search bar and a list of setup options including Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 10:02 on 12-04-2023.

Action	Label	Tab Style	Description
Edit Del	Buyers	Credit card	
Edit Del	Leads	Building	
Edit Del	Loans	Real Estate Sign	
Edit Del	Rents	Building Block	

❖ The Lightning app

Welcome to Salesforce: Verify yo

App Manager | Salesforce

Ingponneri-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

GmailYouTubeMapsNewsTranslate

Search Setup

SetupHomeObject Manager

app manager

Apps

App Manager

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

Enable App Cloning Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	App Ty...	Vi...	
12	Property Manageme...	Property_Management		01/04/2023, 4:21 pm	Lightning	✓	
13	Queue Management	QueueManagement	Create and manage queues for your business.	23/03/2023, 4:40 pm	Lightning	✓	
14	Sales	Sales	The world's most popular sales force automation (SFA) soluti...	23/03/2023, 4:40 pm	Classic		
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportuniti...	23/03/2023, 4:43 pm	Lightning	✓	
16	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple rec...	23/03/2023, 4:40 pm	Lightning	✓	
17	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and...	23/03/2023, 4:40 pm	Classic	✓	
18	Salesforce Scheduler...	LightningScheduler	Set up personalized appointment scheduling.	23/03/2023, 4:42 pm	Lightning	✓	
19	Service	Service	Manage customer service with accounts, contacts, cases, an...	23/03/2023, 4:40 pm	Classic	✓	
20	Service Console	LightningService	(Lightning Experience) Lets support agents work with multip...	23/03/2023, 4:40 pm	Lightning	✓	
21	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-dr...	23/03/2023, 4:40 pm	Classic		

javascriptvoid(0);

Type here to search

10:05
12-04-2023

❖ Fields

❖ Lead

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Lead

Details

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Lead	Lead__c	Auto Number		
Lead Name	Name	Text(80)		✓

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Owner	OwnerId	Lookup(User,Group)	✓
Phone	Phone__c	Phone	
State	State__c	Picklist	

❖ Buy

Setup

Home

Object Manager

Search Setup

Star

Dropdown

Plus

Cloud

Question

Settings

Notifications

Avatar

SETUP > OBJECT MANAGER

Buy

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

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
Annual amount	Annual_amount__c	Currency(18, 0)		
Buy Name	Name	Text(80)		✓
City	City__c	Picklist		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		

❖ Rent

Setup

Home

Object Manager

Search Setup

Star

Dropdown

Plus

Cloud

Question

Settings

Notifications

Avatar

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

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK type	BHK_type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent	Rent__c	Auto Number		
Rent Name	Name	Text(80)		✓
Rental City	Rental_City__c	Text(80)		

❖ Loan

The screenshot displays the Salesforce Object Manager interface for the 'Loan' object. The left sidebar shows navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area is titled 'Fields & Relationships' and shows 11 items sorted by Field Label. The table below lists the fields:

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)		✓
Loan Repayment	Loan_Repayment__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Term	Term__c	Number(18, 0)		
Total Loan Instalments	Total_Loan_Instalments__c	Number(18, 0)		

❖ Profile

The screenshot shows the Salesforce Profiles page in a web browser. The browser address bar displays the URL: <https://ingponneri-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home>. The Salesforce interface shows the 'Profiles' section under 'Setup'. The left sidebar has a search bar for 'Profiles' and a list of users. The main content area is titled 'Profiles' and shows a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists 10 profiles, including 'Marketing_Executive', 'Marketing_Executive_1', 'Marketing_Executive_2', 'Marketing_Manager', 'Marketing_User', 'Minimum Access - Salesforce', 'Partner App Subscription User', 'Partner Community Login User', and 'Partner Community User'. The bottom of the page shows the page number 'Page 1 of 2' and the date '12-04-2023'.

❖ Users

Welcome to Salesforce: Verify you are logged in as **Users | Salesforce**

Ingponneri-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP Users

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00d2w00000rg3yzeaz_scsaad4hix2@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Kumar_Ragav	rkuma	sharmiladevir1903@gmail.com		✓	Sales Rep3
<input type="checkbox"/> Edit	Kumar_Vishwa	vkuma	sharmi1903@gmail.com		✓	Marketing_Executive_2
<input type="checkbox"/> Edit	R_Sharmila Devi	SR	sharmiladevi@ingcc.com		✓	System Administrator
<input type="checkbox"/> Edit	Raj_Ajay	araj	sharmiladevi1903@gmail.com		✓	Marketing Manager
<input type="checkbox"/> Edit	Suresh_Vijay	vsure	sharm1903@gmail.com		✓	Marketing_Executive_1
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d2w00000rg3yzeaz.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d2w00000rg3yzeaz.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

❖ Permission set

Welcome to Salesforce: Verify you are logged in as **Permission Sets | Salesforce**

Ingponneri-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

New

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Permission Set Label ↑	Description	License
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloca...	Facility Manager
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service m...	Field Service Mobile
<input type="checkbox"/> Del Clone	Marketing		
<input type="checkbox"/> Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Shopper	Limited access to Order Management features for Self Ser...	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Store Associate	Access to limited features enabled by Order Management	Lightning Order Management User

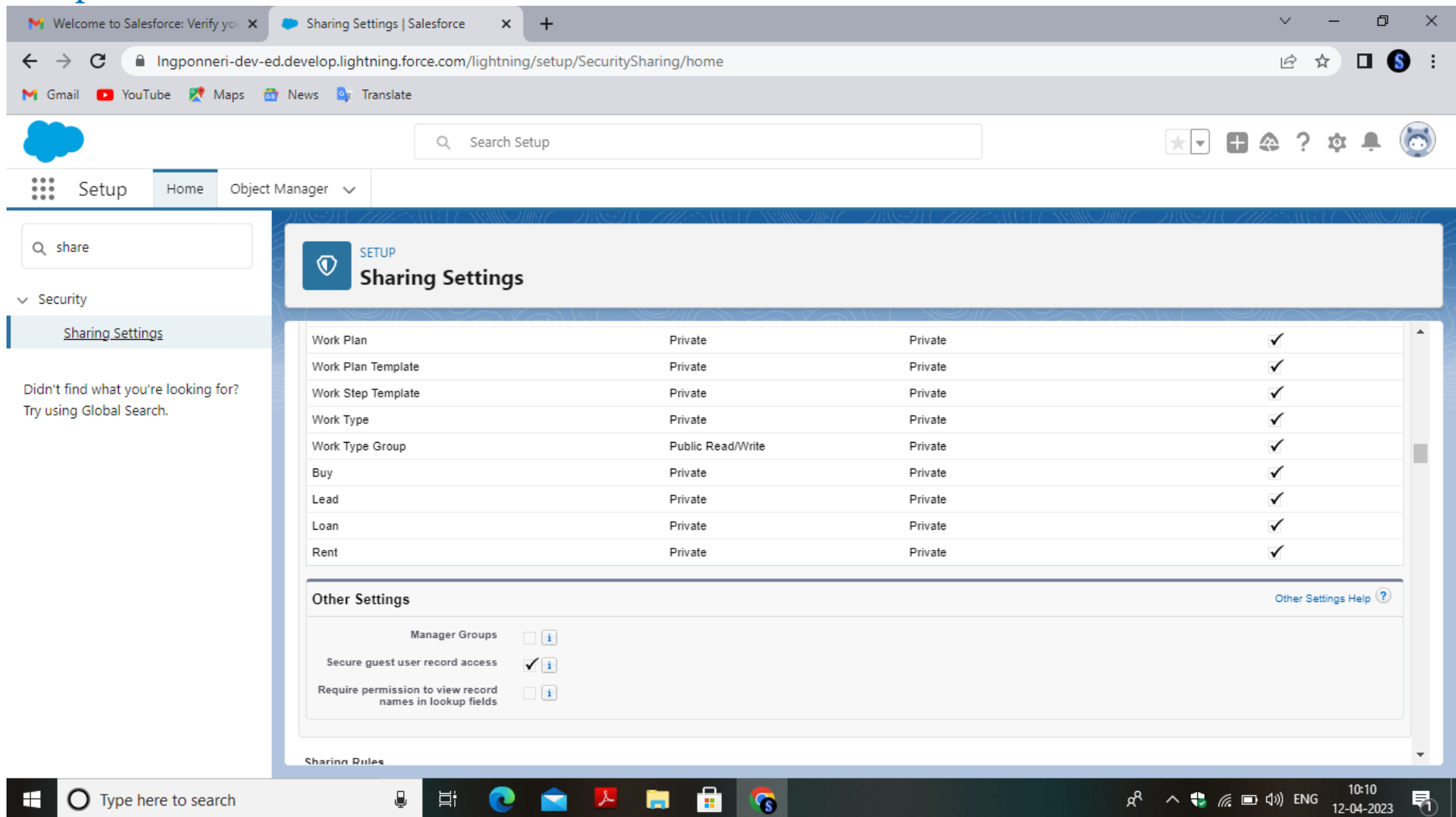
1-27 of 27 0 Selected

Previous Next

Page 1 of 1

https://Ingponneri-dev-ed.develop.lightning.force.com/one/one.app#/setup/PermSets/home

❖ Setup for OWD



The screenshot shows the Salesforce Setup interface for Sharing Settings. The browser address bar indicates the URL: `Ingponneri-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home`. The left sidebar shows the Setup menu with 'Home' and 'Object Manager' options. The main content area is titled 'Sharing Settings' and contains a table of sharing settings for various objects.

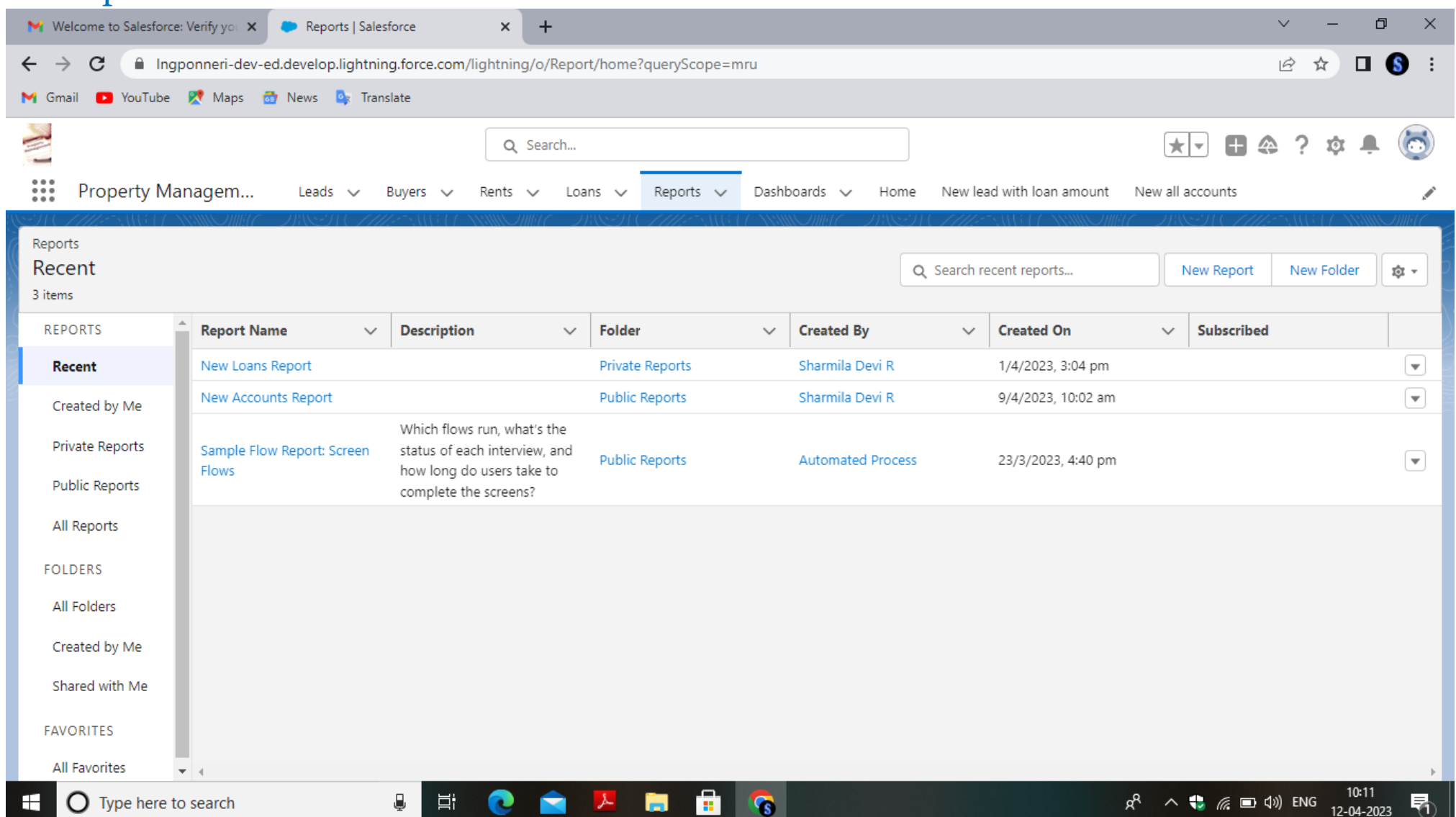
Object	Private	Public Read/Write	Checkmark
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Buy	Private	Private	✓
Lead	Private	Private	✓
Loan	Private	Private	✓
Rent	Private	Private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

Below the table, there is an 'Other Settings' section with the following options:

- Manager Groups: ☐ [i](#)
- Secure guest user record access: ☒ [i](#)
- Require permission to view record names in lookup fields: ☐ [i](#)

The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

❖ Report

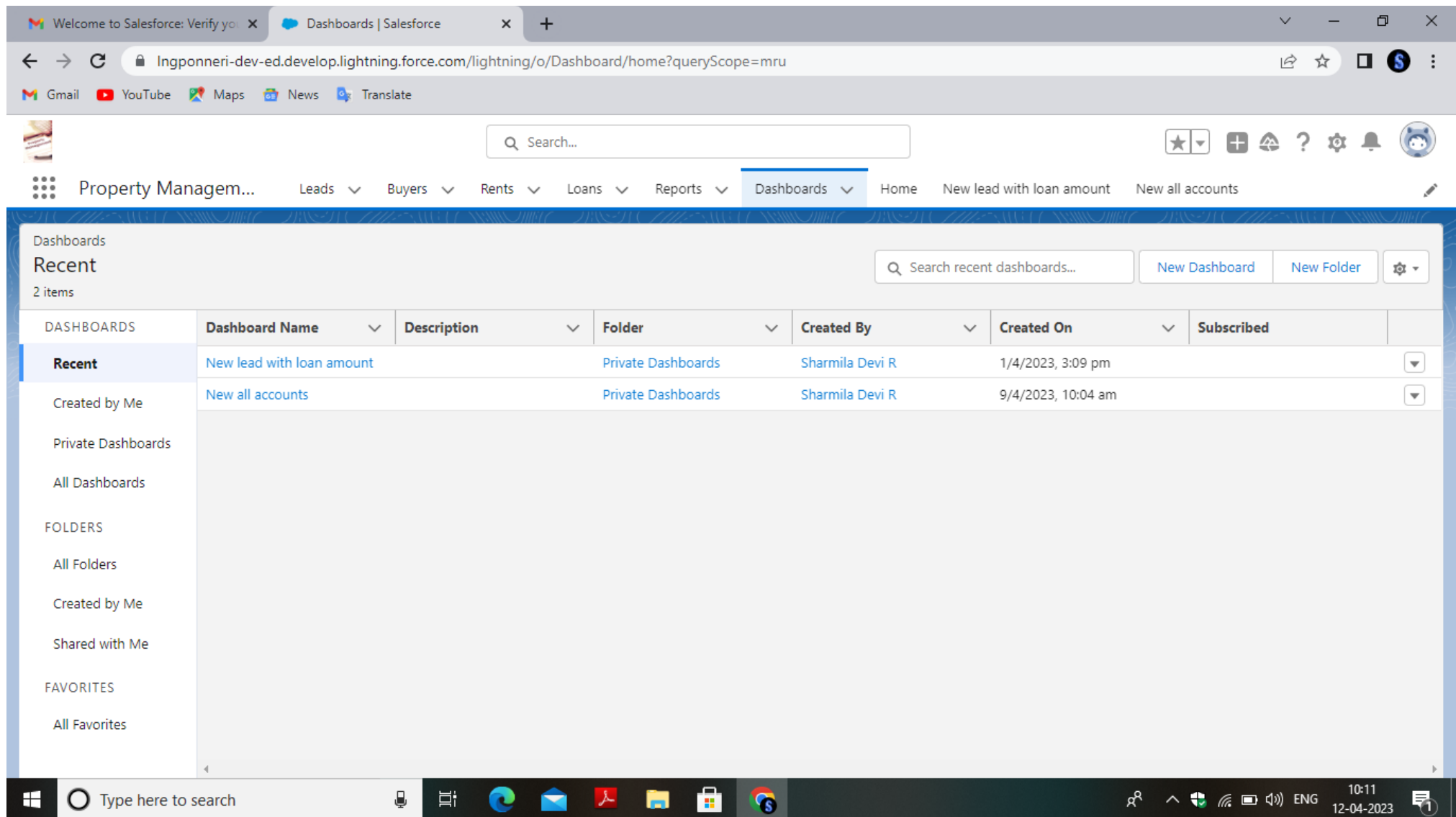


The screenshot shows the Salesforce Reports page. The browser address bar indicates the URL: `Ingponneri-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru`. The left sidebar shows the Reports menu with 'Recent' and 'All Reports' options. The main content area is titled 'Reports' and contains a table of recent reports.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Loans Report		Private Reports	Sharmila Devi R	1/4/2023, 3:04 pm	<input type="checkbox"/>
New Accounts Report		Public Reports	Sharmila Devi R	9/4/2023, 10:02 am	<input type="checkbox"/>
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	23/3/2023, 4:40 pm	<input type="checkbox"/>

The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

❖ Dashboards



4.Trailhead Profile Public URL

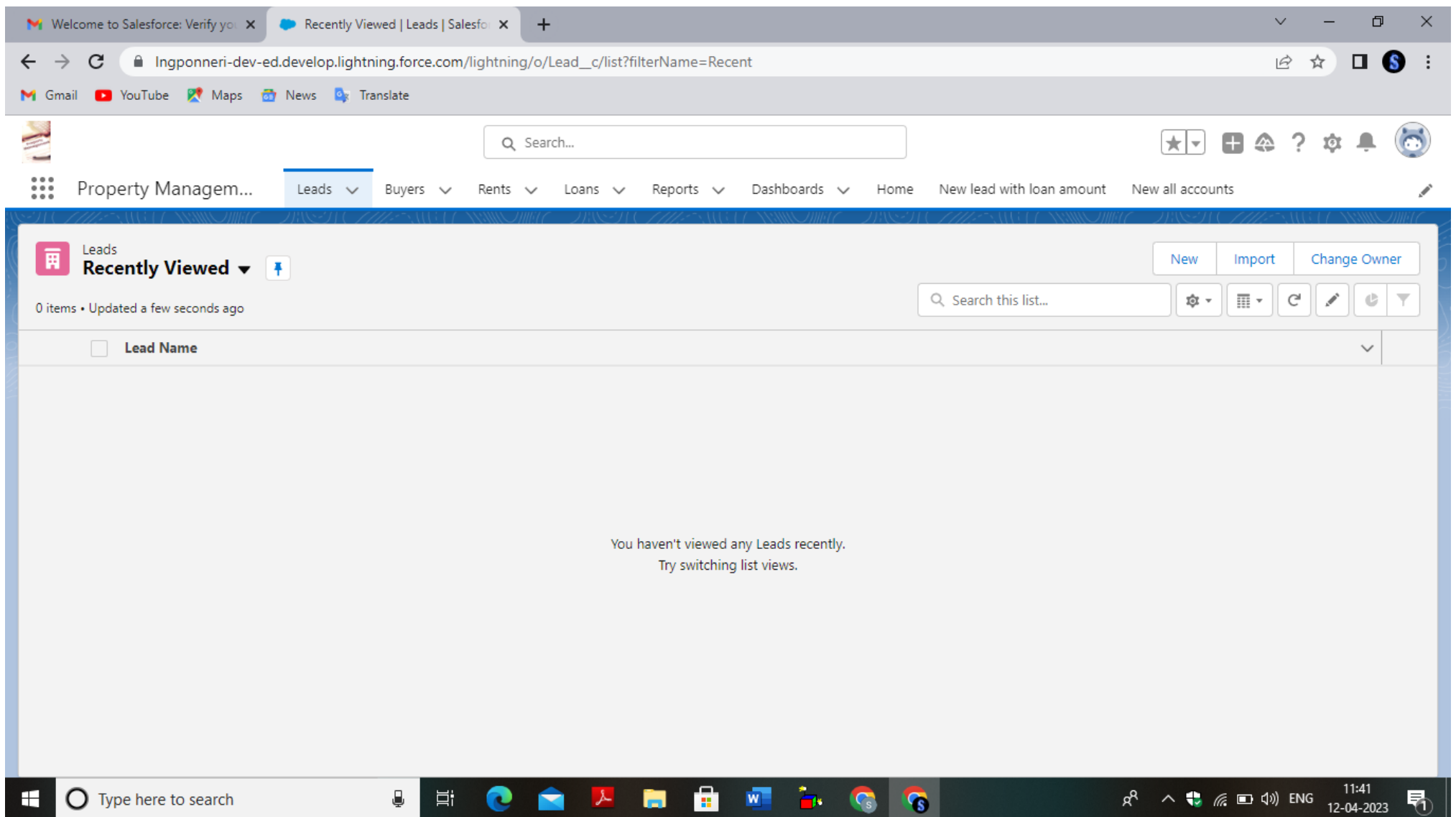
- ❖ Team Lead- <https://trailblazer.me/id/sdevir19>
- ❖ Team Member1- <https://trailblazer.me/id/ov9y1>
- ❖ Team Member2- <https://trailblazer.me/id/llawanyam>
- ❖ Team Member3- <https://trailblazer.me/id/tselvi34>
- ❖ Team Member4- <https://trailblazer.me/id/ncrazy1>

5.Advantage & Disadvantage

- Advantage:
 - * Salesforce for Property Management helps provide clients with a more personalized experience via advanced marketing automation tools, customizable reports, and dashboards.
- Disadvantage:
 - * Less control over CRM upgrades and planned downtimes.

6. Applications

We have created Property Management application in Salesforce platform. The application screenshot has attached below



7. Conclusion

- This project is useful for a buyer can order his Requirements and get the appropriate details of the property.
- Also track whether a buyer is interested in taking the loan available for so just calculate how much loan amount user can get it.

8. Future Scope

- As in Property Management are being gradually automized and augmented by sophisticated software and applications of various sensors and high-tech improvements
- Property management application can, for example, send invoices or remind tenants of the end of the contract period, or provide online digital signature and verification services.
- In the future, these conveniences will be more sophisticated and more accurate