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

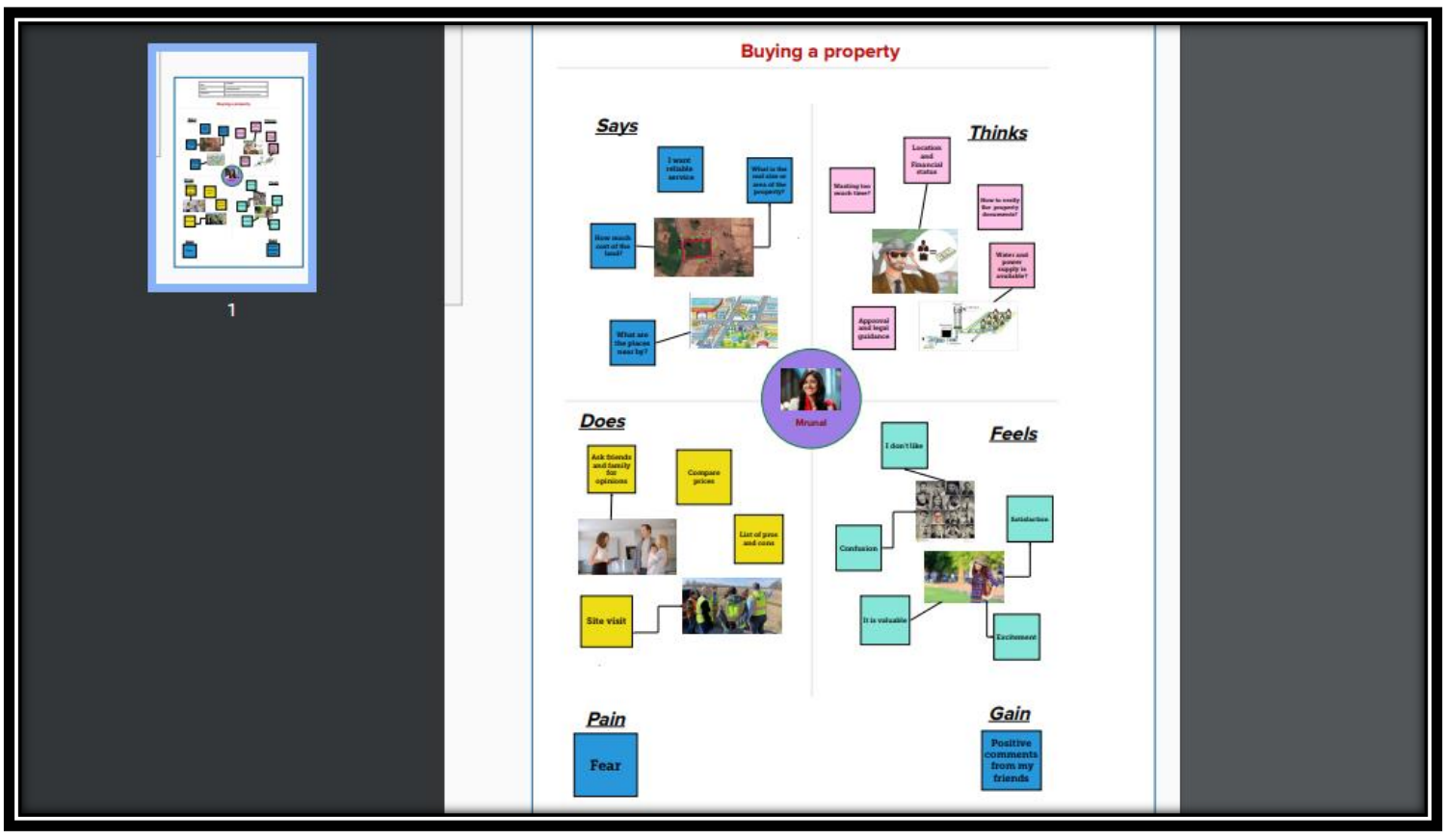
- Profile and User Creation
  - ❖ We created profiles and users for Marketing Manager, Marketing Executive, Sales Manager, Sales Rep1, Sales Rep2, Sales Rep3
- Permission Set Creation
  - ❖ We searched permission set in quick find box and selected it, then we had click new enter detail, save it→click 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

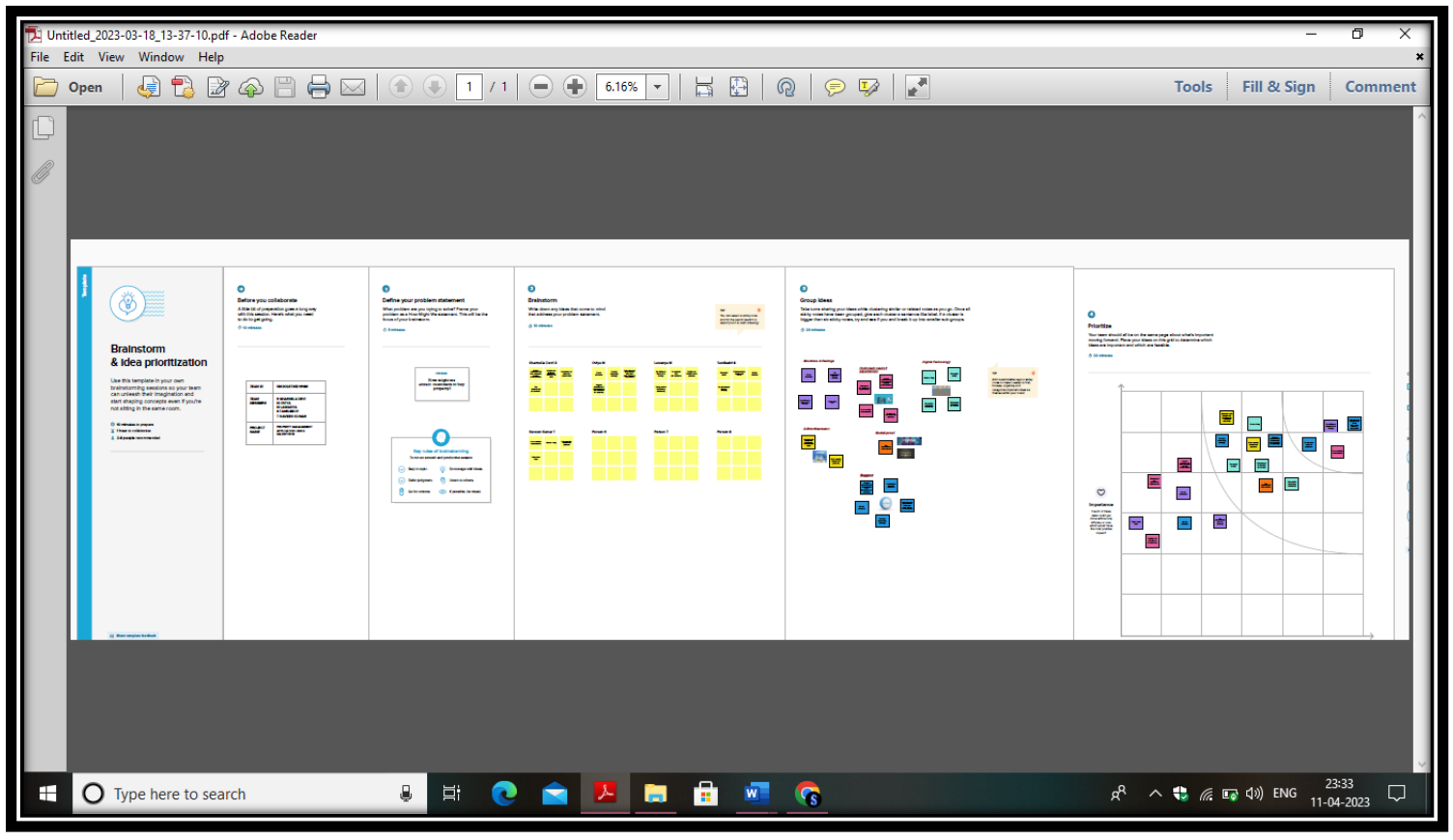
- ❖ The Property management application using salesforce is used for buyers can order his requirements and get the appropriate details of the property
- ❖ It helps businesses keep track of customer interactions
- ❖ What I have learned from this project
  - Real Time Salesforce Project
  - Object & Relationship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

2. Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming



3. Result

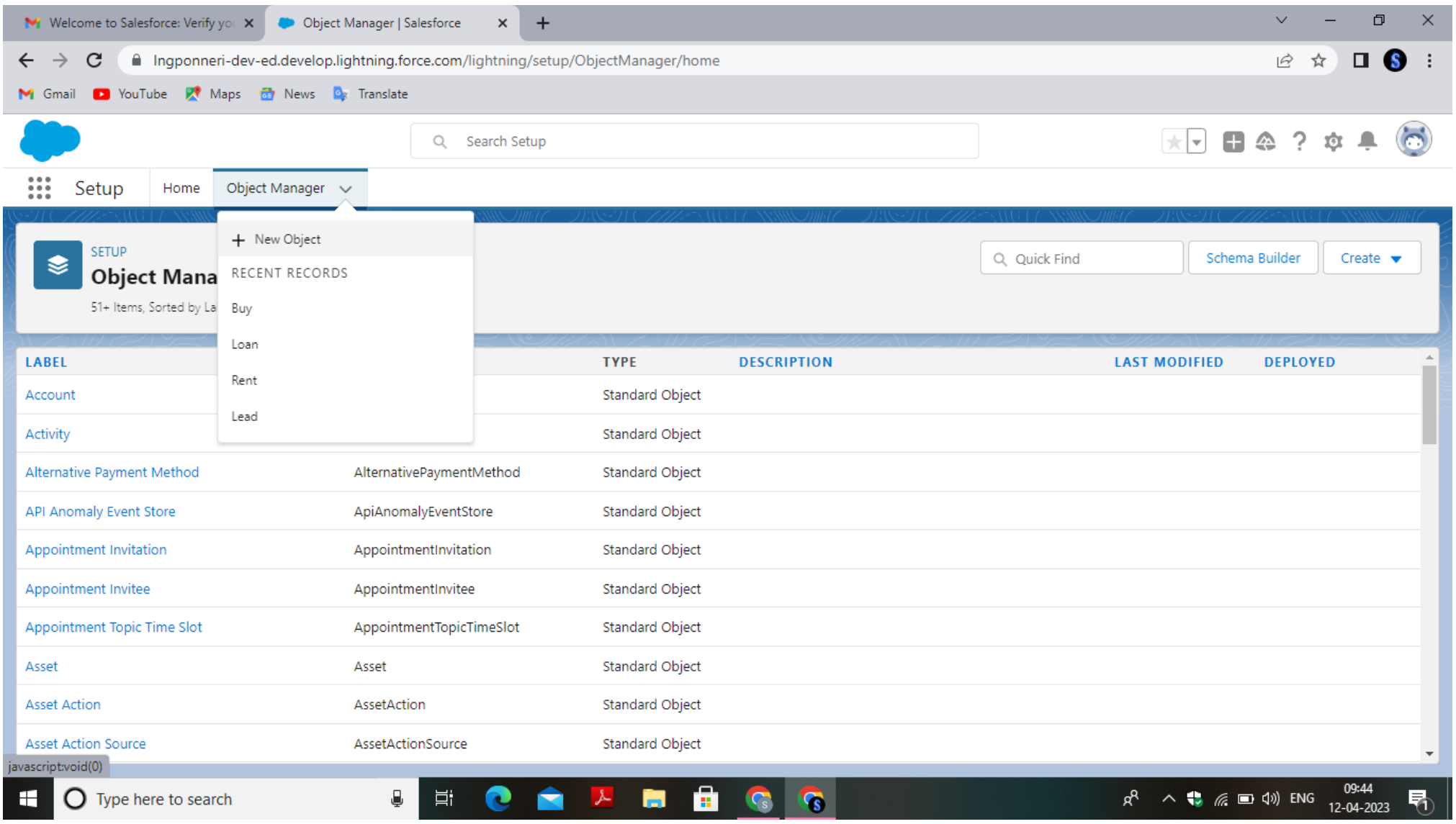
3.1 Data Model:

<table>
<tr><th>Object Name</th><th>Fields in the Object</th></tr>
<tr><td>Lead</td><td>
<table>
<tr><td>Field Label</td><td>Data type</td></tr>
<tr><td>Lead</td><td>Auto Number</td></tr>
<tr><td>State</td><td>Picklist</td></tr>
<tr><td>City</td><td>Picklist</td></tr>
<tr><td>Email</td><td>Email</td></tr>
<tr><td>Phone</td><td>Phone</td></tr>
</table>
</td></tr>
<tr><td>Buy</td><td>
<table>
<tr><td>Field label</td><td>Data type</td></tr>
<tr><td>Property type</td><td>Picklist</td></tr>
<tr><td>Discount</td><td>Percentage</td></tr>
<tr><td>State</td><td>Picklist</td></tr>
<tr><td>City</td><td>Picklist</td></tr>
<tr><td>Annual amount</td><td>Currency</td></tr>
</table>
</td></tr>
</table>

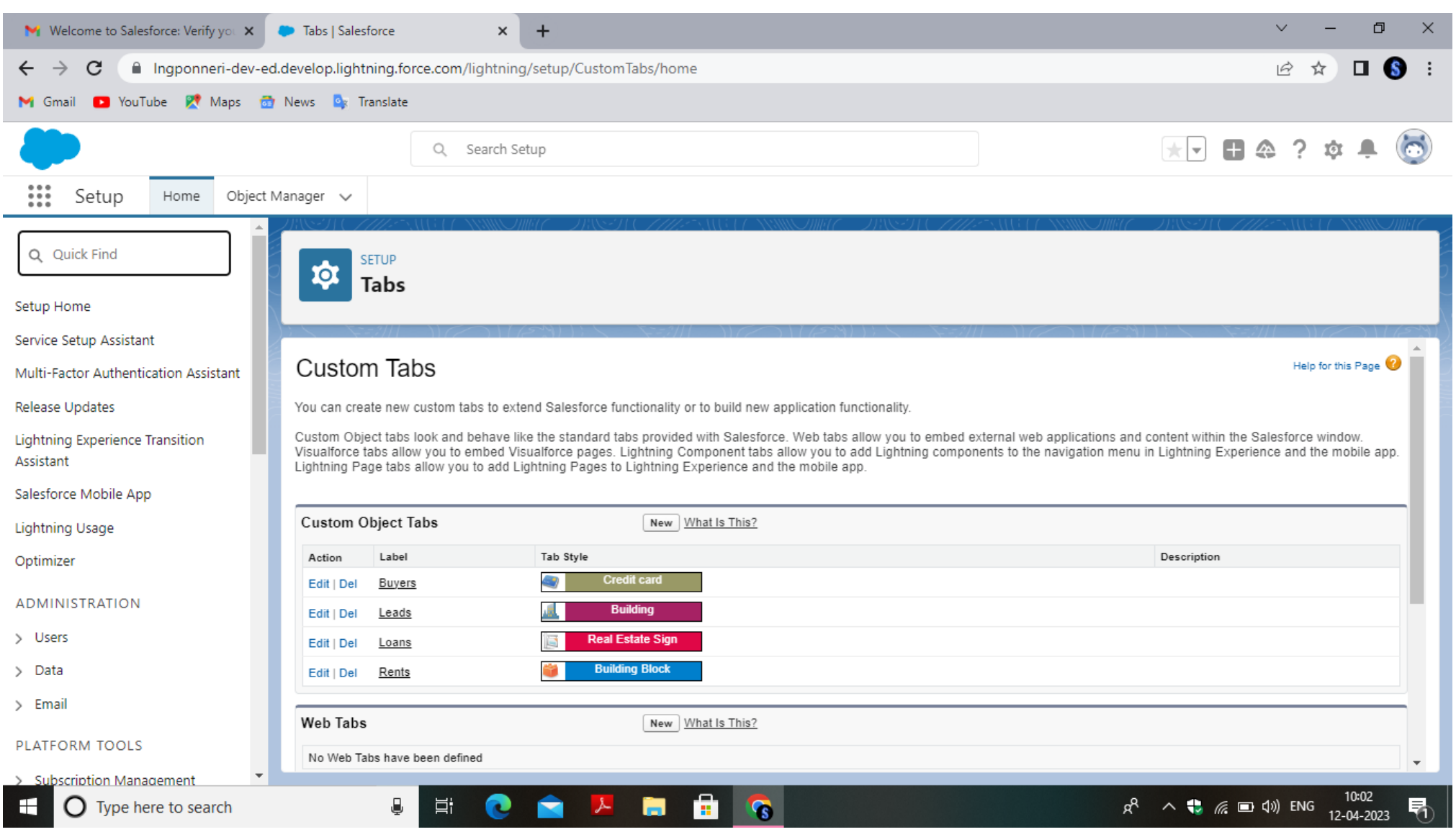
<table>
<tr><td>Rent</td><td>
<table>
<tr><td>Field label</td><td>Data type</td></tr>
<tr><td>Rent</td><td>Auto number</td></tr>
<tr><td>Rental City</td><td>Text</td></tr>
<tr><td>BHK</td><td>Picklist</td></tr>
</table>
</td></tr>
<tr><td>Loan</td><td>
<table>
<tr><td>Field label</td><td>Data type</td>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

3.2 Activity & Screenshot

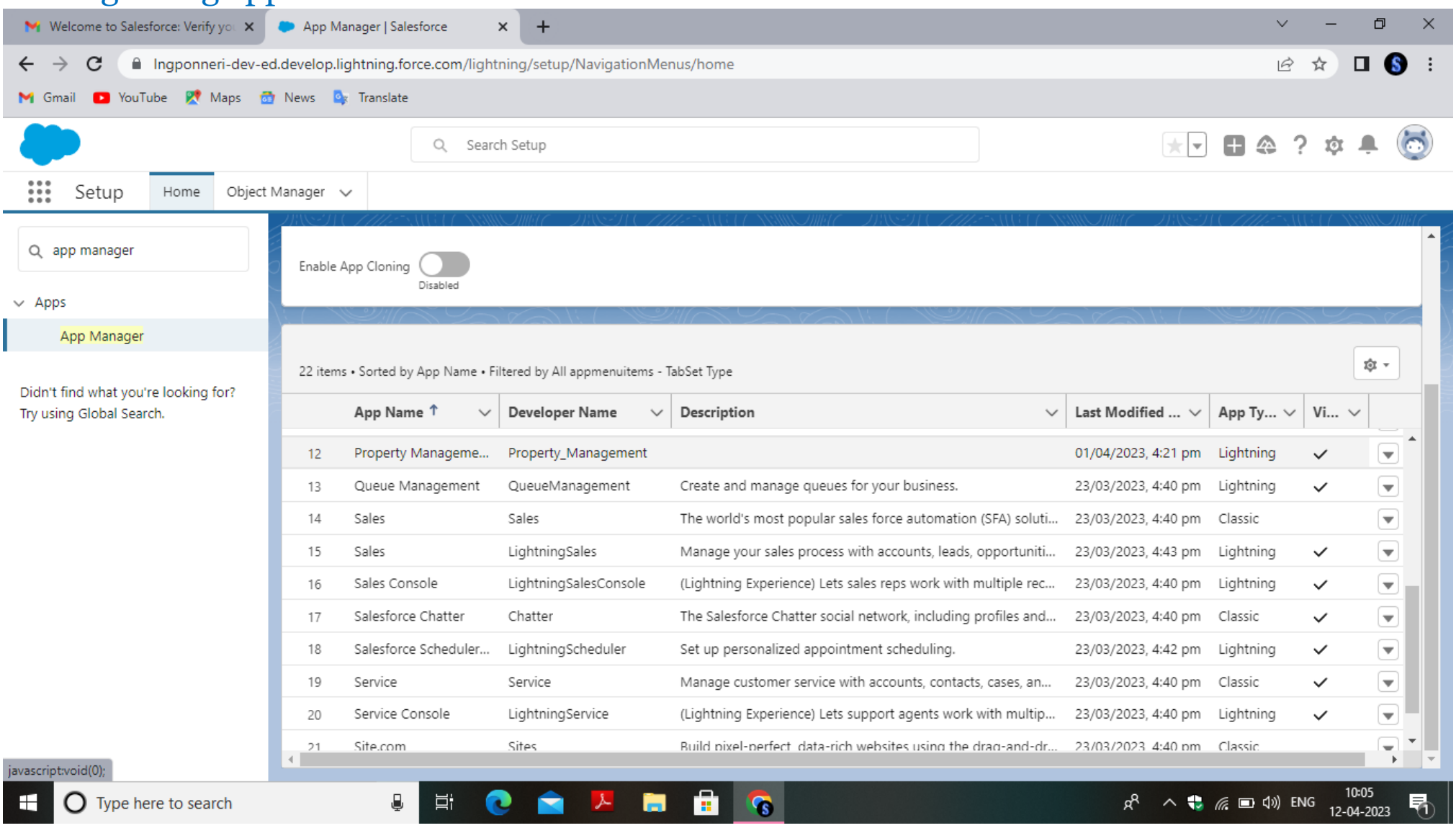
❖ Object



❖ Tabs

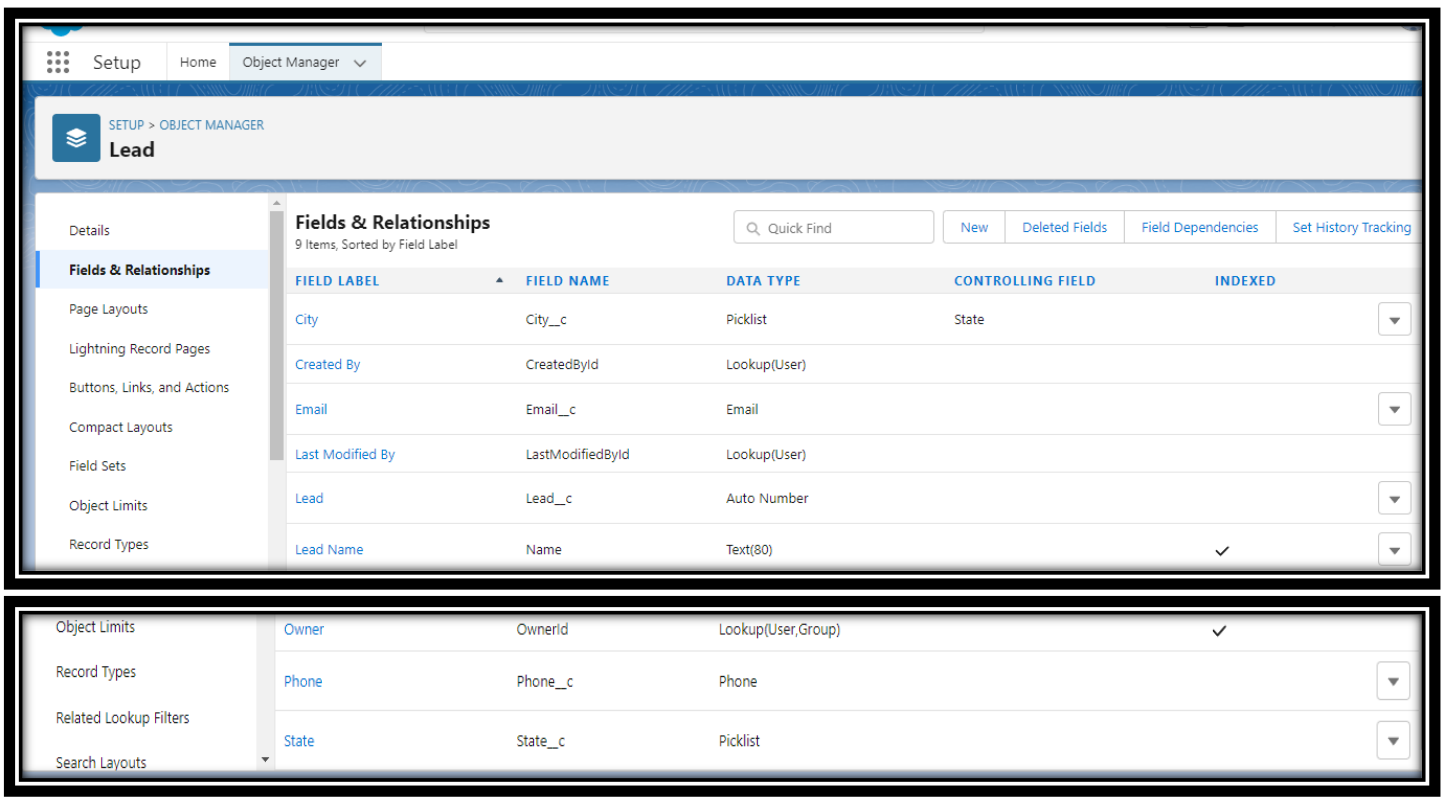


❖ The Lightning app

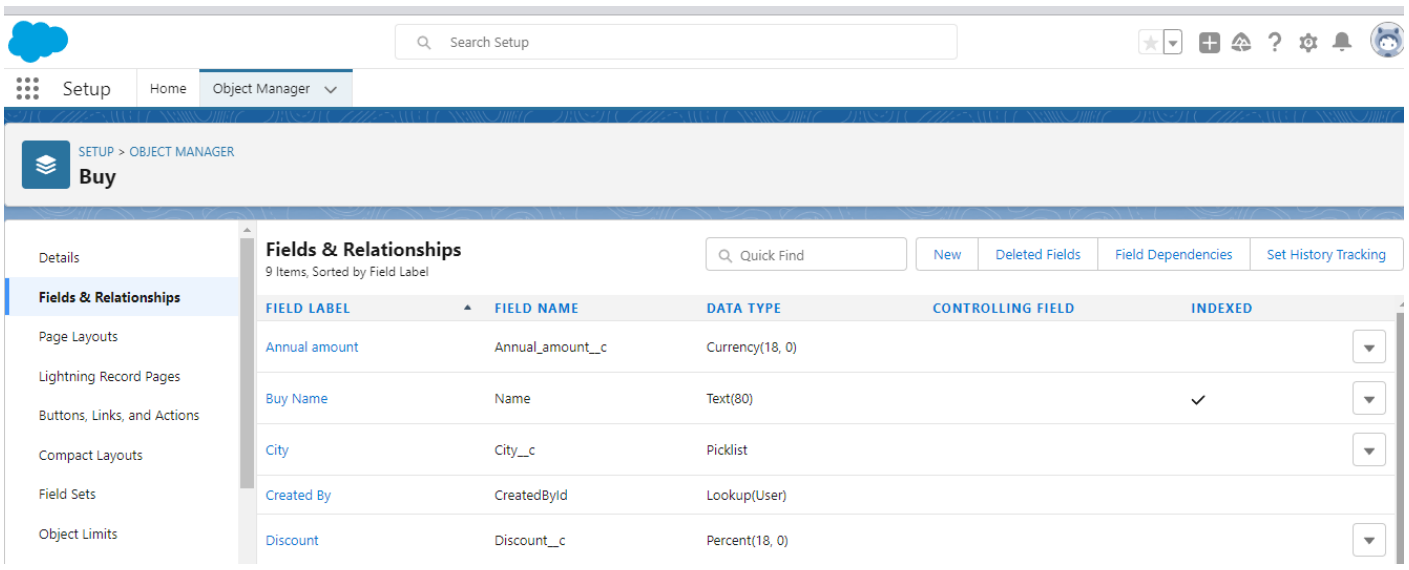


❖ Fields

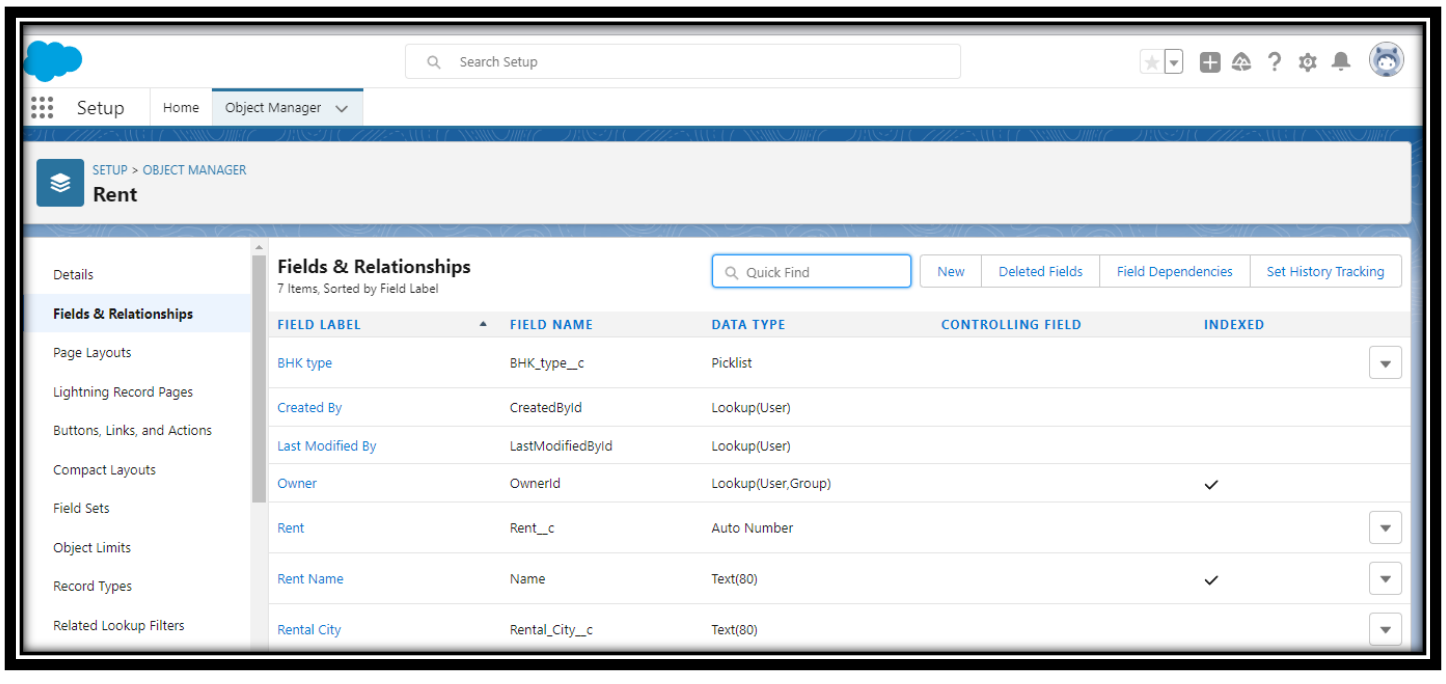
❖ Lead



❖ Buy


Search Setup
Setup
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
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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SETUP > OBJECT MANAGER
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Lightning Record Pages
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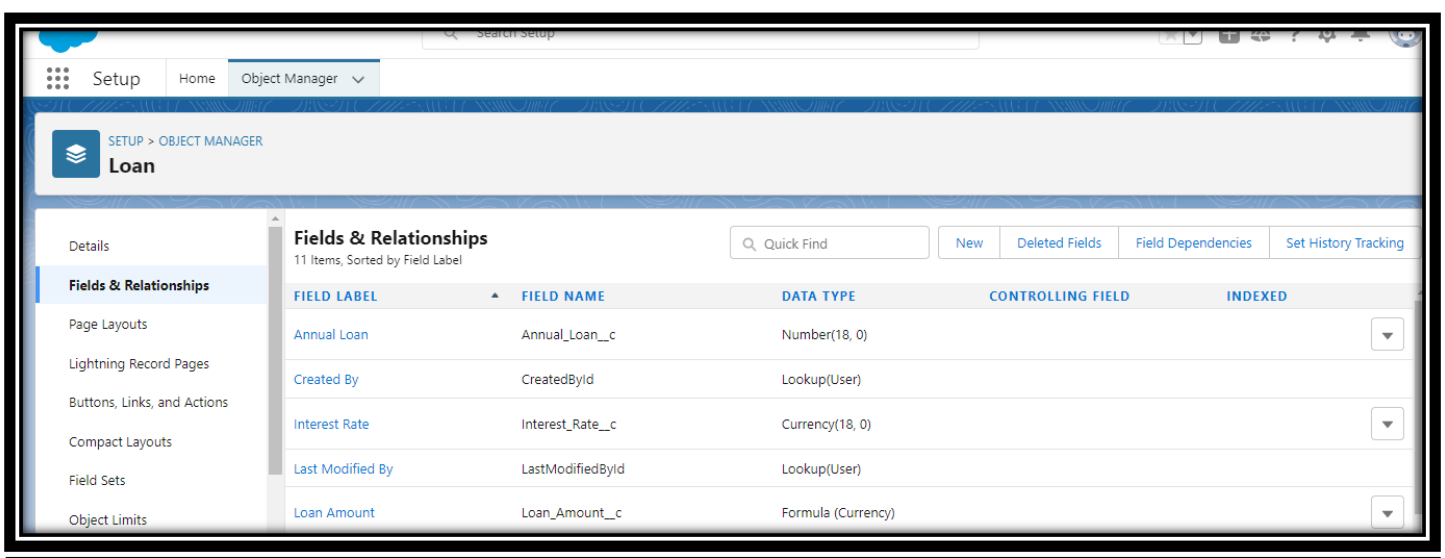
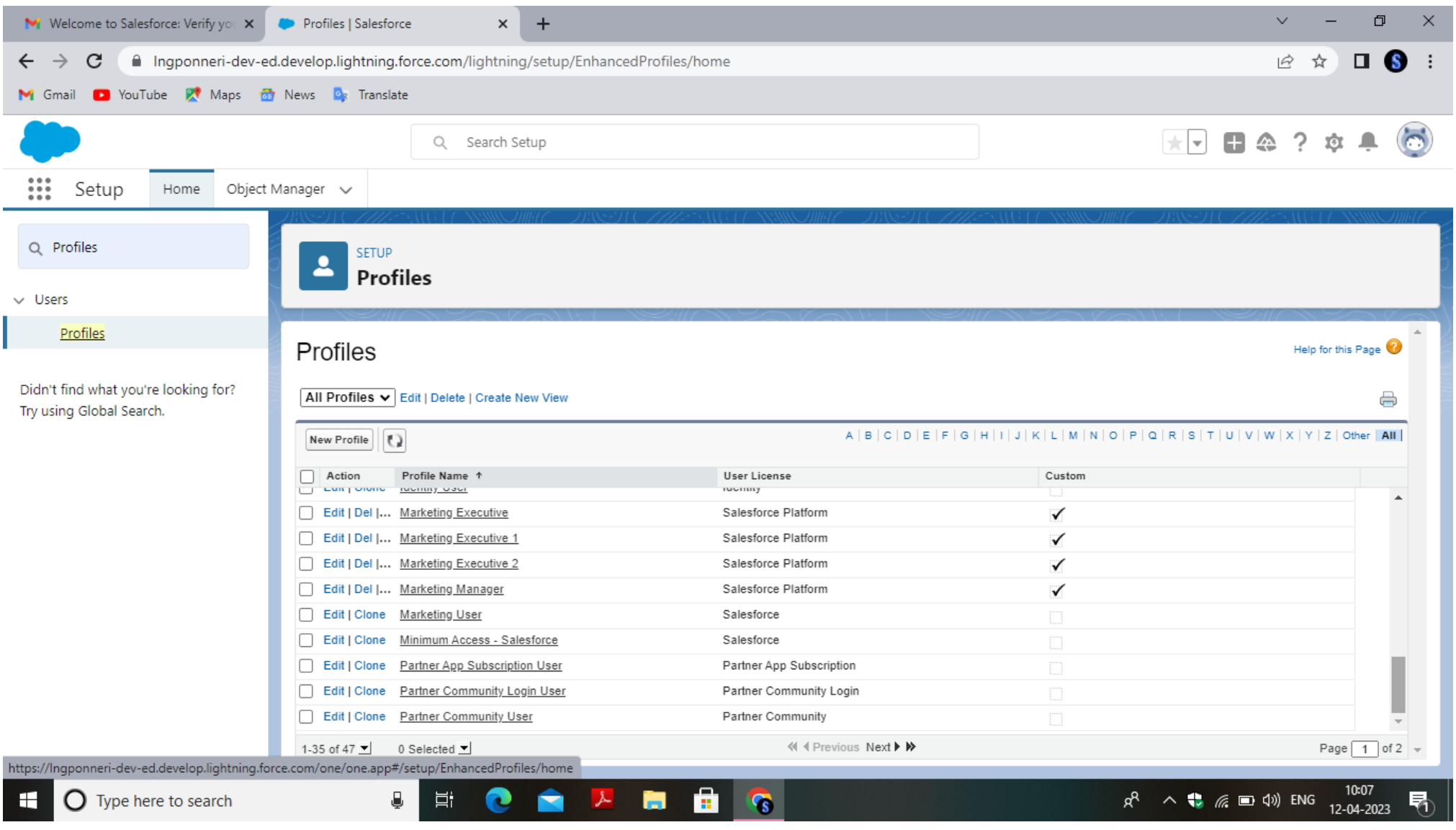
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
BHK type
BHK_type__c
Picklist
Created By
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)

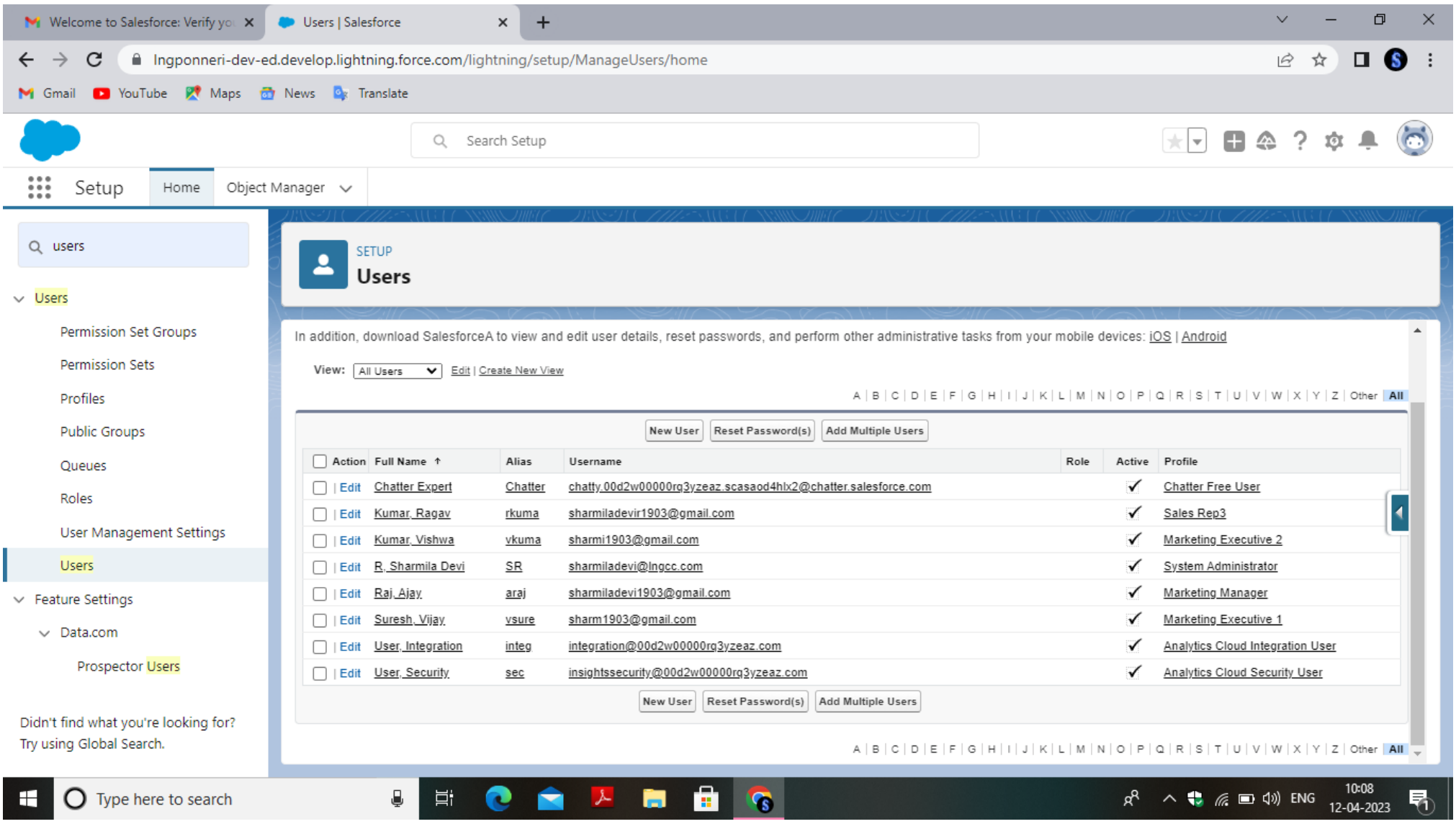
❖ Loan



❖ Profile

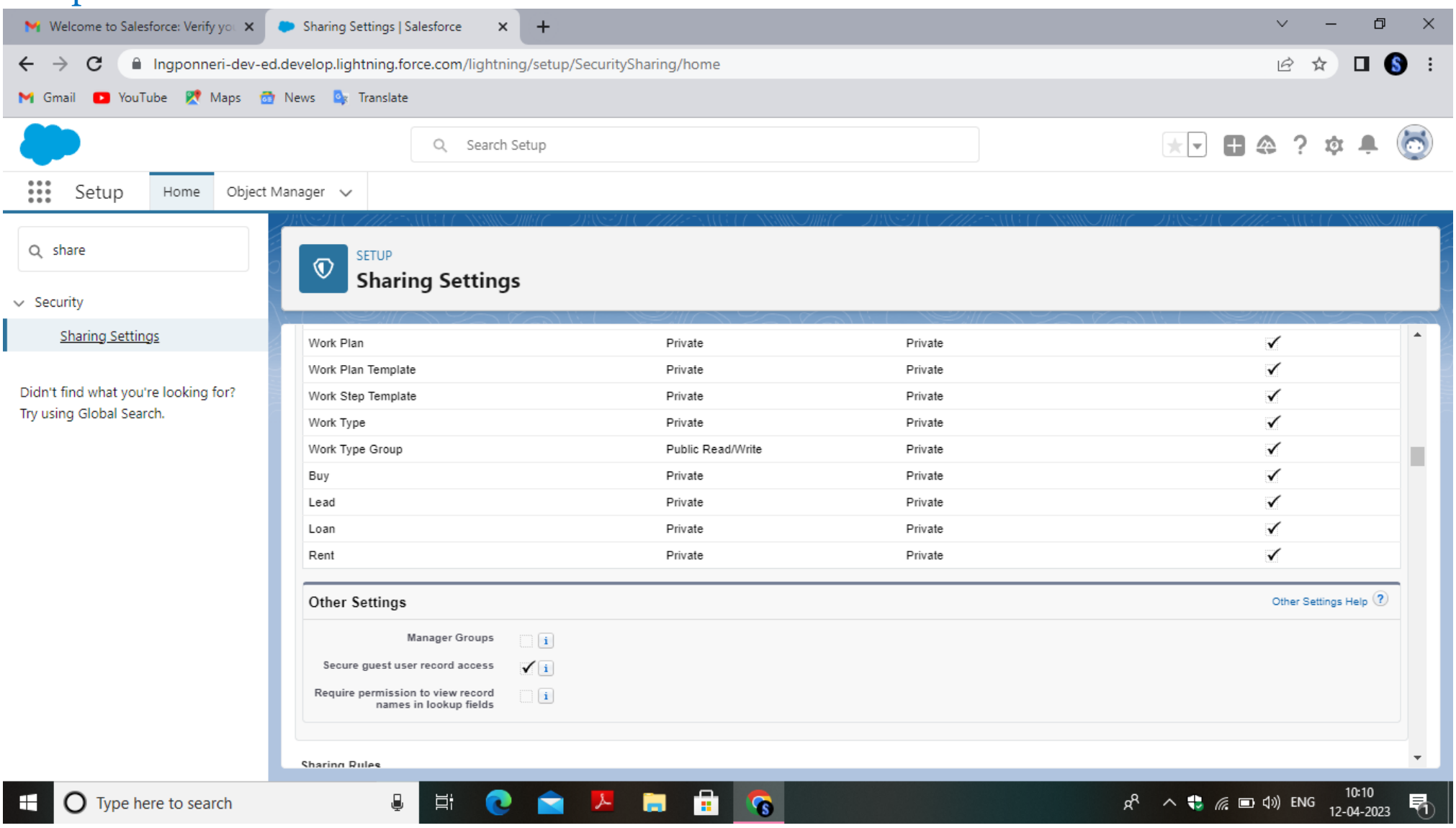


❖ Users

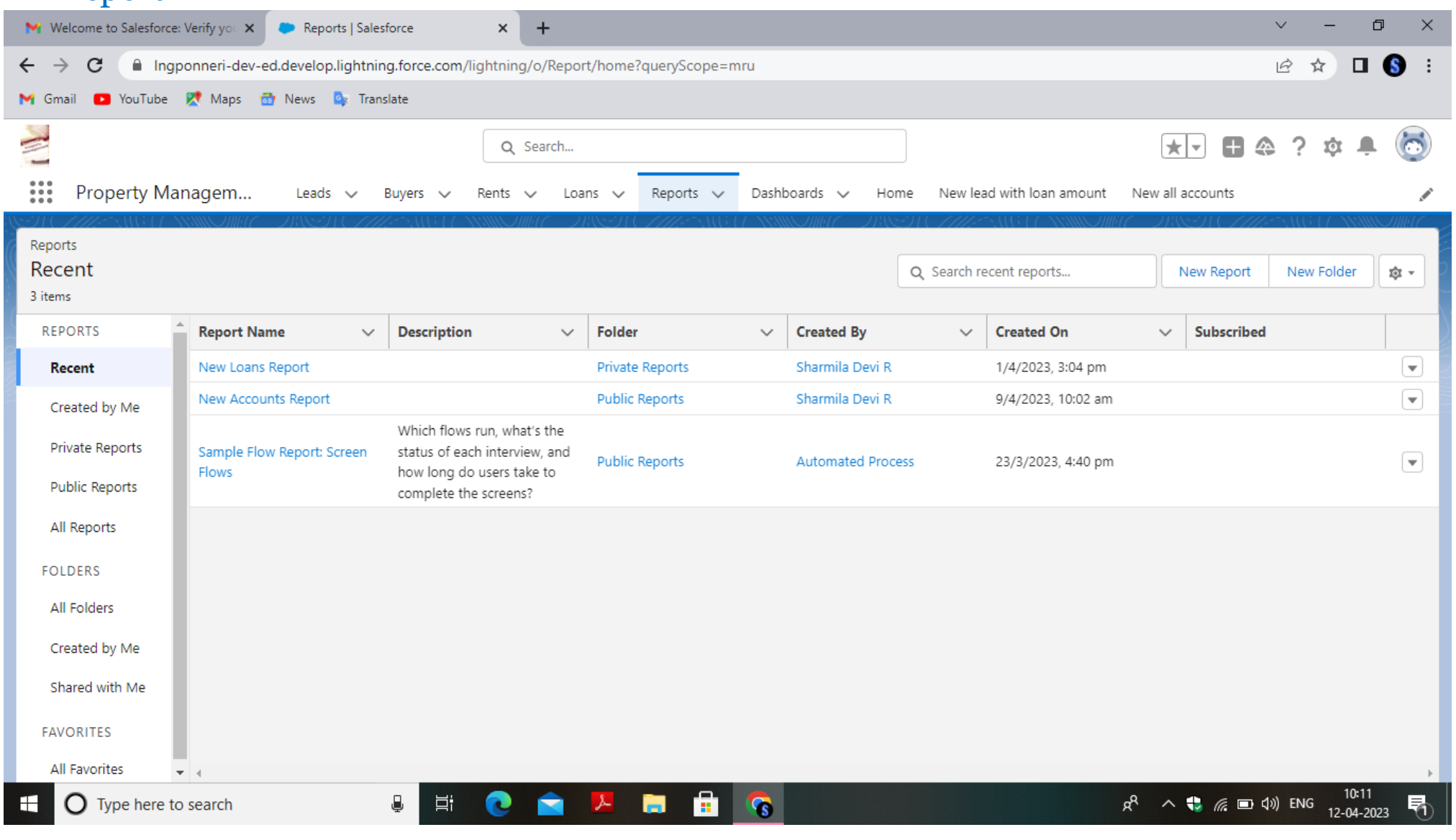


❖ Permission set

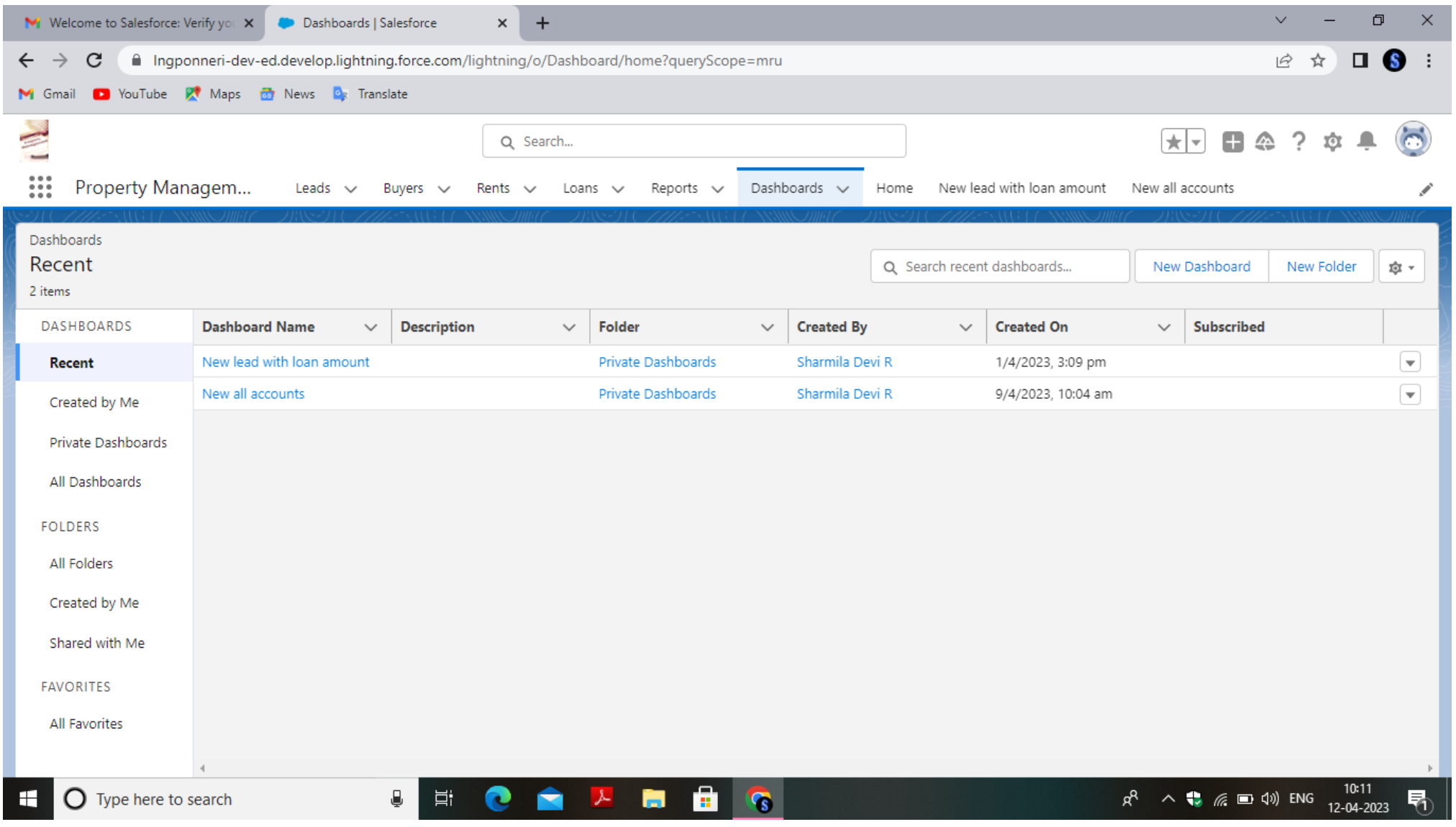
❖ Setup for OWD



❖ Report



❖ Dashboards



4.Trailhead Profile Public URL

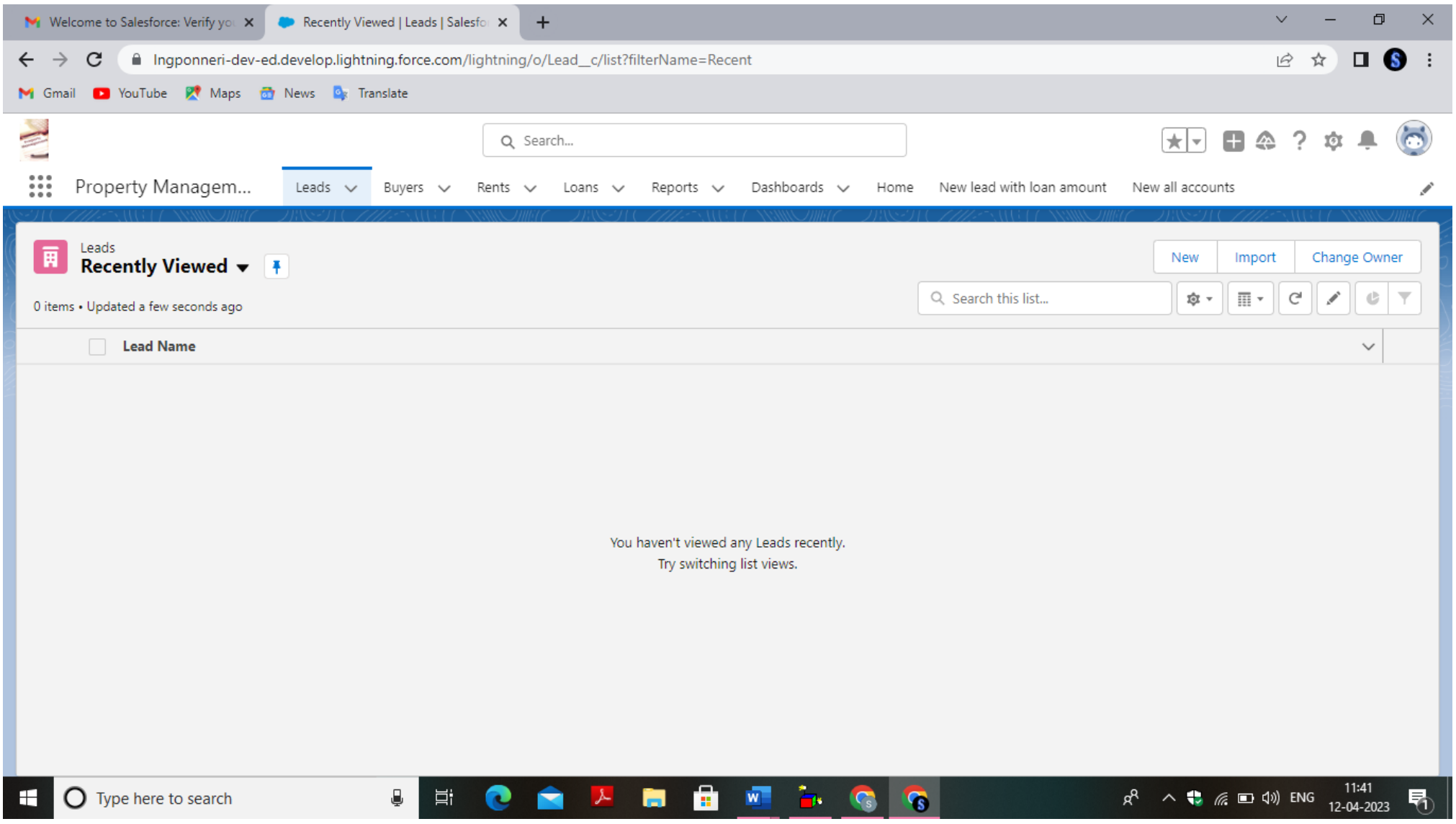
- Team Lead- https://trailblazer.me/id/sdevir19
- Team Member1- https://trailblazer.me/id/ov9y1
- Team Member2- https://trailblazer.me/id/llawanyam
- Team Member3- https://trailblazer.me/id/tselvi34
- Team Member4- https://trailblazer.me/id/ncrazy1

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