NAAN MUTHALVAN PROJECT REPORT

Property Management Application Using Salesforce

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Team member 3: G. Sangeetha

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.

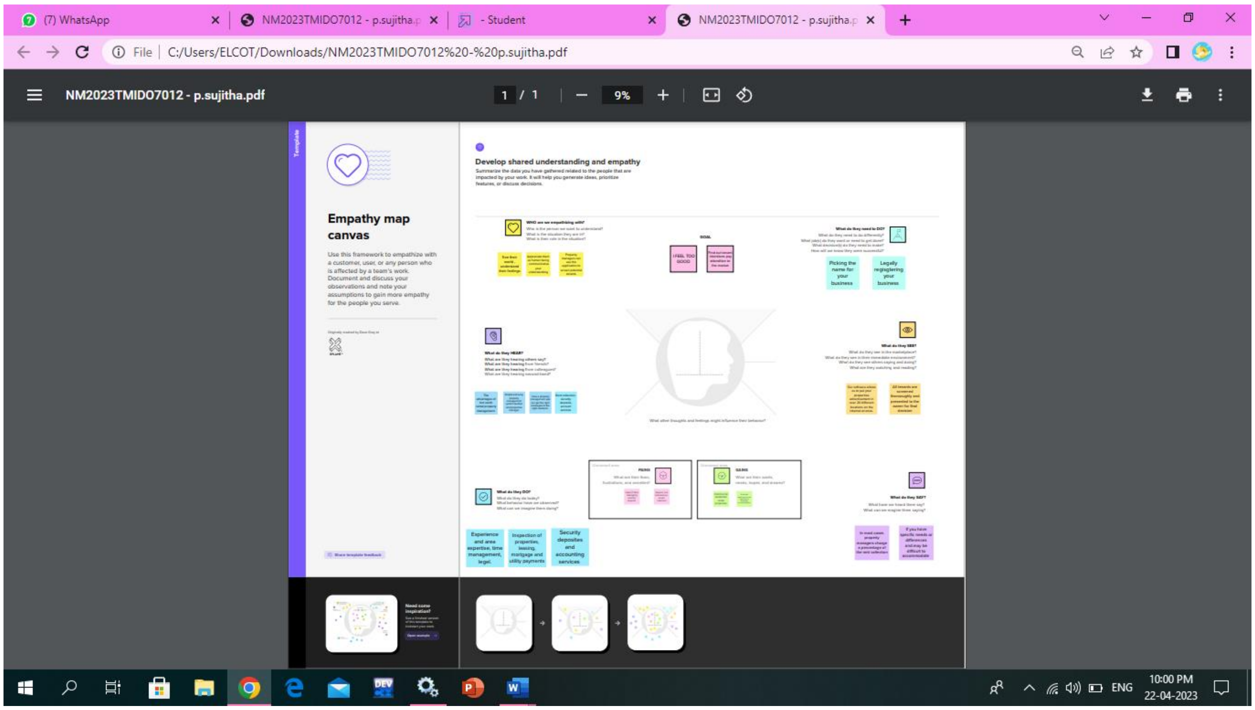
Salesforce

Introduction

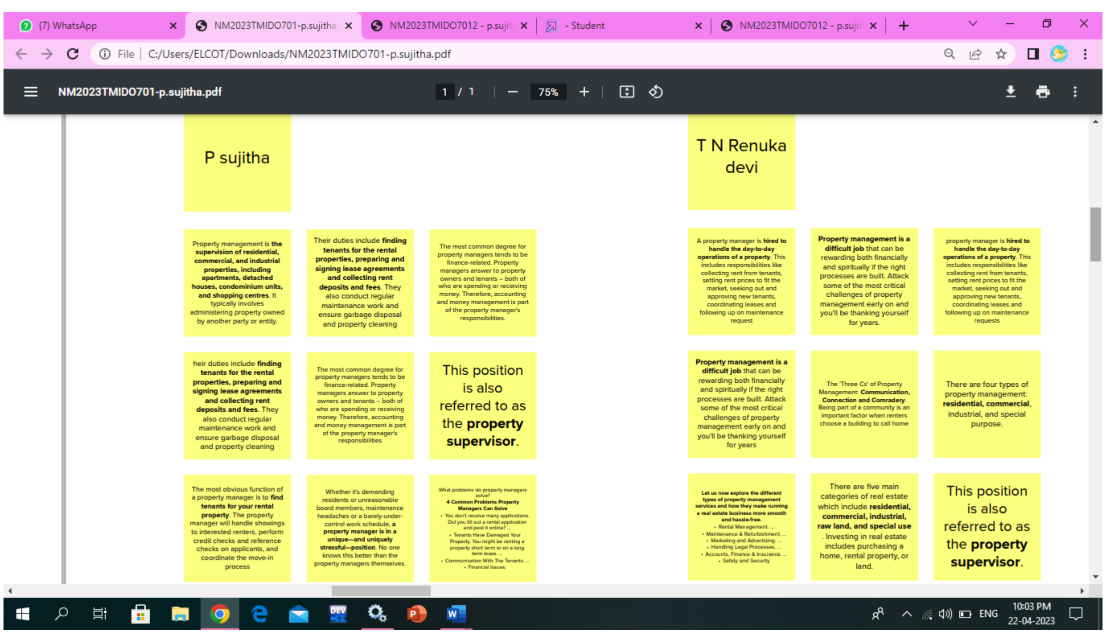
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

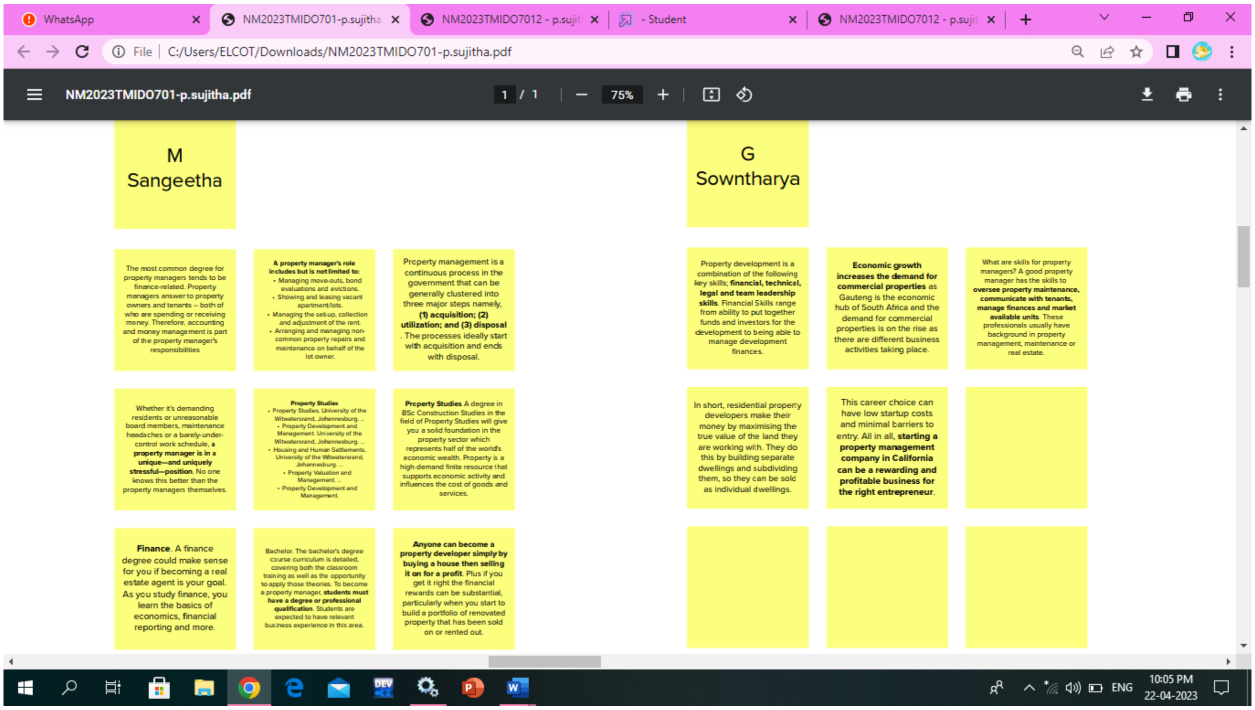
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Empathy map:



Brain storm





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NM2023TMIDO7012 - p.suji
- Student
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G Sowntharya
The most common degree for property managers tends to be finance-related. Property managers answer to property owners and tenants – both of who are spending or receiving money. Therefore, accounting and money management is part of the property manager's responsibilities
A property manager's role includes but is not limited to:
• Managing move-outs, bond evaluations and evictions.
• Showing and leasing vacant apartment/lots.
• Managing the set-up, collection and adjustment of the rent.
• Arranging and managing non-common property repairs and maintenance on behalf of the lot owner.
Property management is a continuous process in the government that can be generally clustered into three major steps namely, (1) acquisition; (2) utilization; and (3) disposal . The processes ideally start with acquisition and ends with disposal.
Whether it's demanding residents or unreasonable board members, maintenance headaches or a barely-under-control work schedule, a property manager is in a unique—and uniquely stressful—position. No one knows this better than the property managers themselves.
Property Studies
• Property Studies. University of the Witwatersrand, Johannesburg. ...
• Property Development and Management. University of the Witwatersrand, Johannesburg. ...
• Housing and Human Settlements. University of the Witwatersrand, Johannesburg. ...
• Property Valuation and Management. ...
• Property Development and Management.
Property Studies A degree in BSc Construction Studies in the field of Property Studies will give you a solid foundation in the property sector which represents half of the world's economic wealth. Property is a high-demand finite resource that supports economic activity and influences the cost of goods and services.
Finance. A finance degree could make sense for you if becoming a real estate agent is your goal. As you study finance, you learn the basics of economics, financial reporting and more.
Bachelor. The bachelor's degree course curriculum is detailed, covering both the classroom training as well as the opportunity to apply those theories. To become a property manager, students must have a degree or professional qualification. Students are expected to have relevant business experience in this area.
Anyone can become a property developer simply by buying a house then selling it on for a profit. Plus if you get it right the financial rewards can be substantial, particularly when you start to build a portfolio of renovated property that has been sold on or rented out.
Property development is a combination of the following key skills; financial, technical, legal and team leadership skills. Financial Skills range from ability to put together funds and investors for the development to being able to manage development finances.
Economic growth increases the demand for commercial properties as Gauteng is the economic hub of South Africa and the demand for commercial properties is on the rise as there are different business activities taking place.
What are skills for property managers? A good property manager has the skills to oversee property maintenance, communicate with tenants, manage finances and market available units. These professionals usually have background in property management, maintenance or real estate.
In short, residential property developers make their money by maximising the true value of the land they are working with. They do this by building separate dwellings and subdividing them, so they can be sold as individual dwellings.
This career choice can have low startup costs and minimal barriers to entry. All in all, starting a property management company in California can be a rewarding and profitable business for the right entrepreneur.
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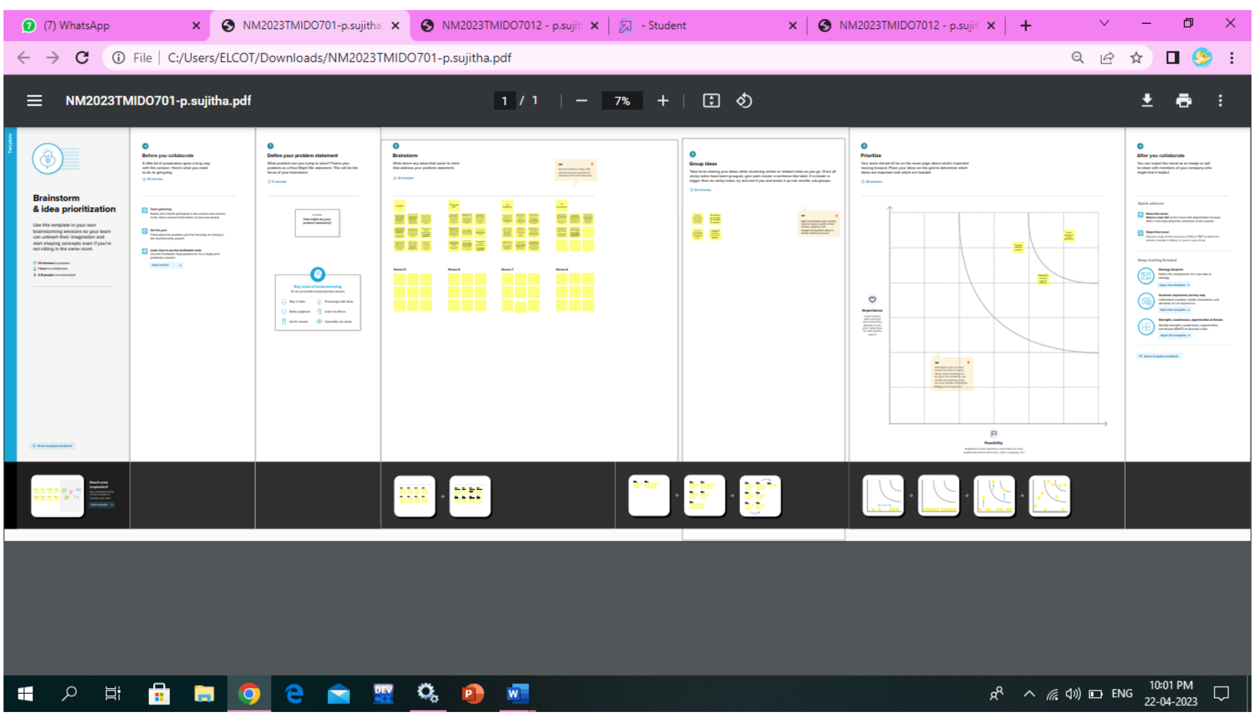

(7) WhatsApp
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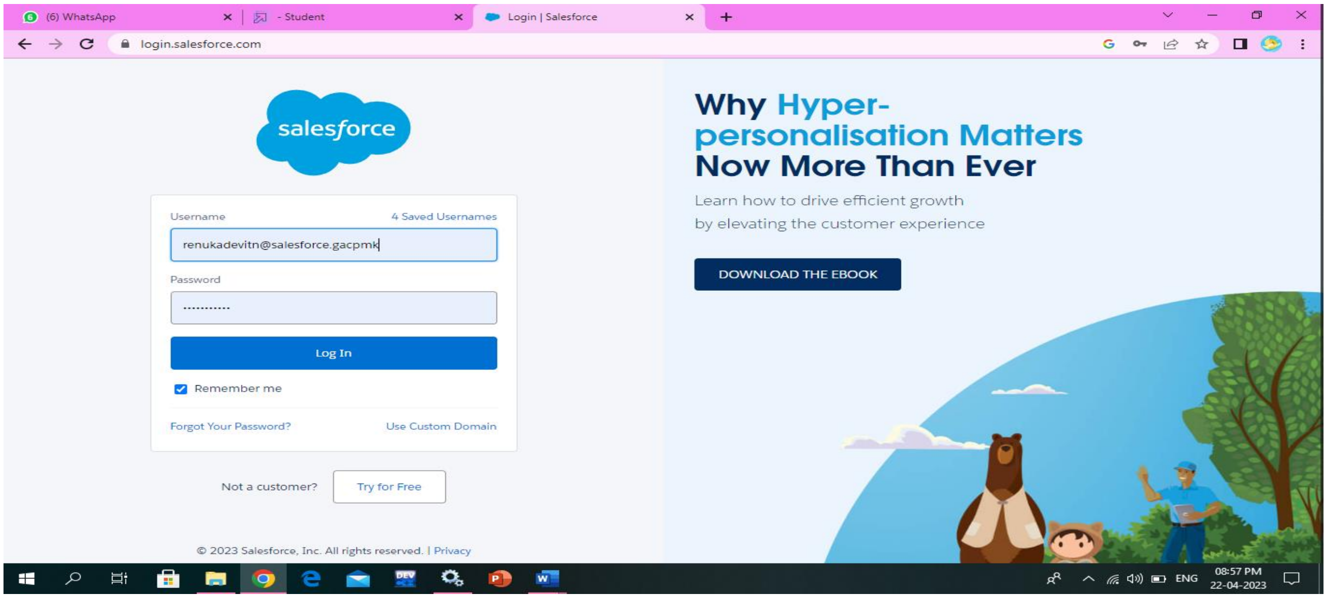
Result

Data model:

<table>
<tr><th>Object name</th><th>Field in the object</th></tr>
<tr><td>Buy</td><td><table><tr><td>Field name</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>Field Dependency</td></tr></table></td></tr>
<tr><td>Rent</td><td><table><tr><td>Field name</td><td>Data type</td></tr><tr><td>Rental City</td><td>Data Name</td></tr><tr><td>BHK type</td><td>Picklist</td></tr></table></td></tr>
<tr><td>Loan</td><td><table><tr><td>Field name</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>Total Loan Instalments</td><td>Number</td></tr><tr><td>Loan Repayment</td><td>Number</td></tr><tr><td>Loan Amoun</td><td>Formula</td></tr></table></td></tr>
</table>

Creating Developer Account

Creating a developer org in salesforce.



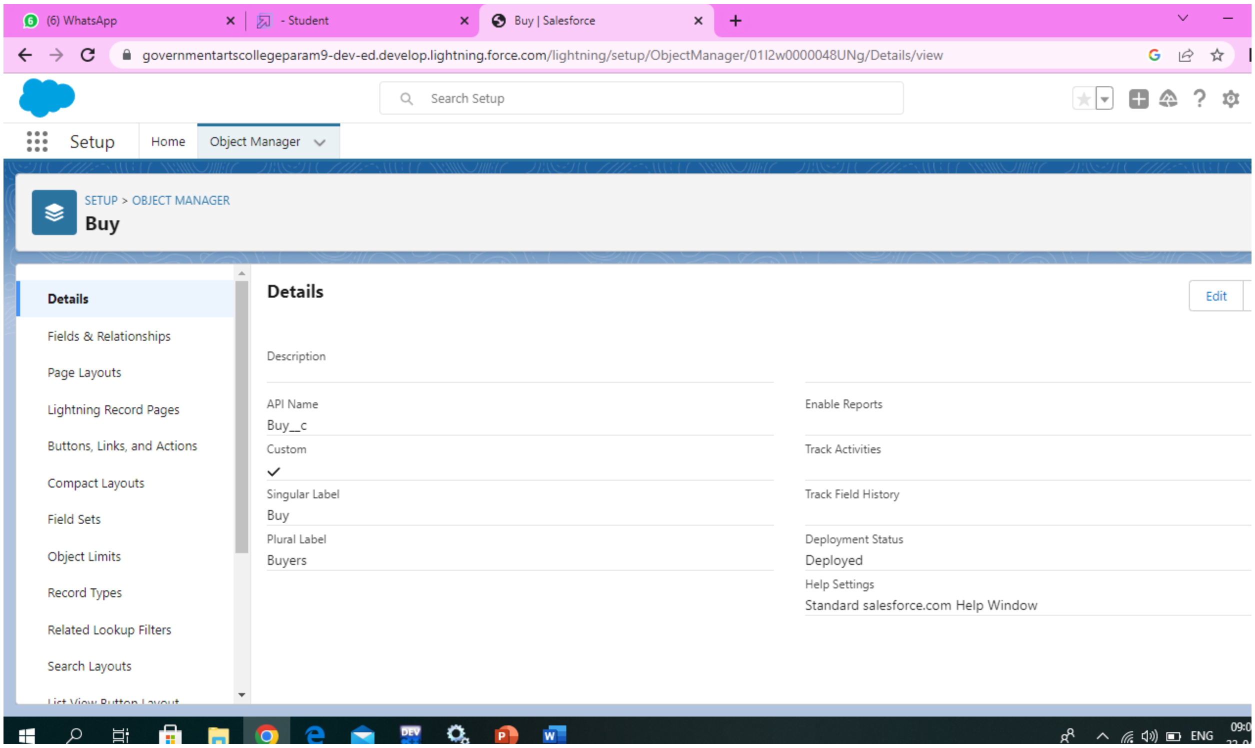
What Is Object?

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

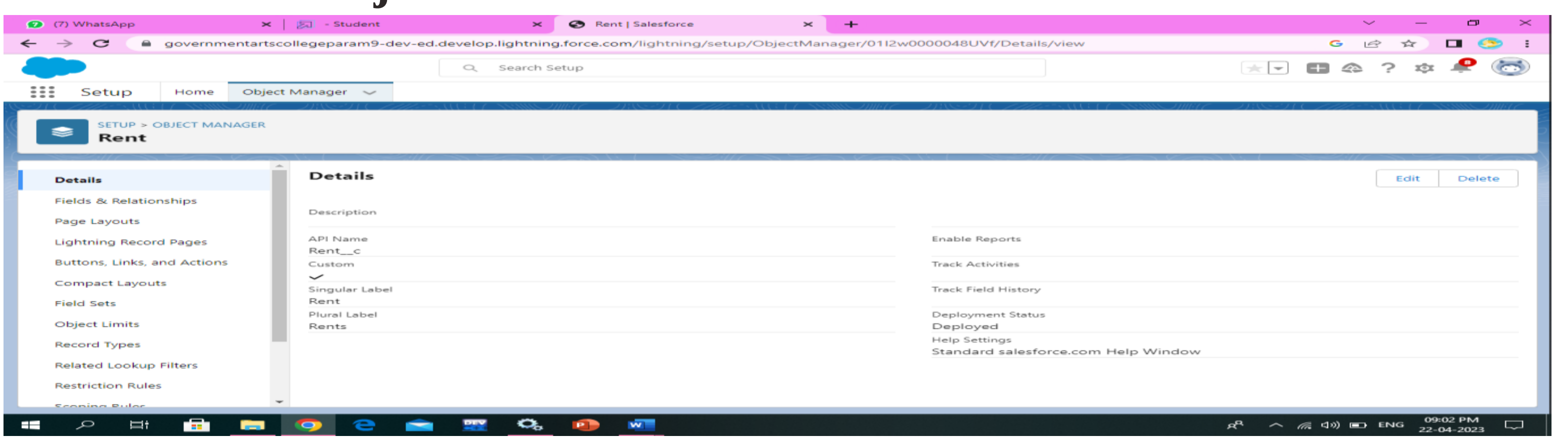
Salesforce objects are of two types:

- **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.

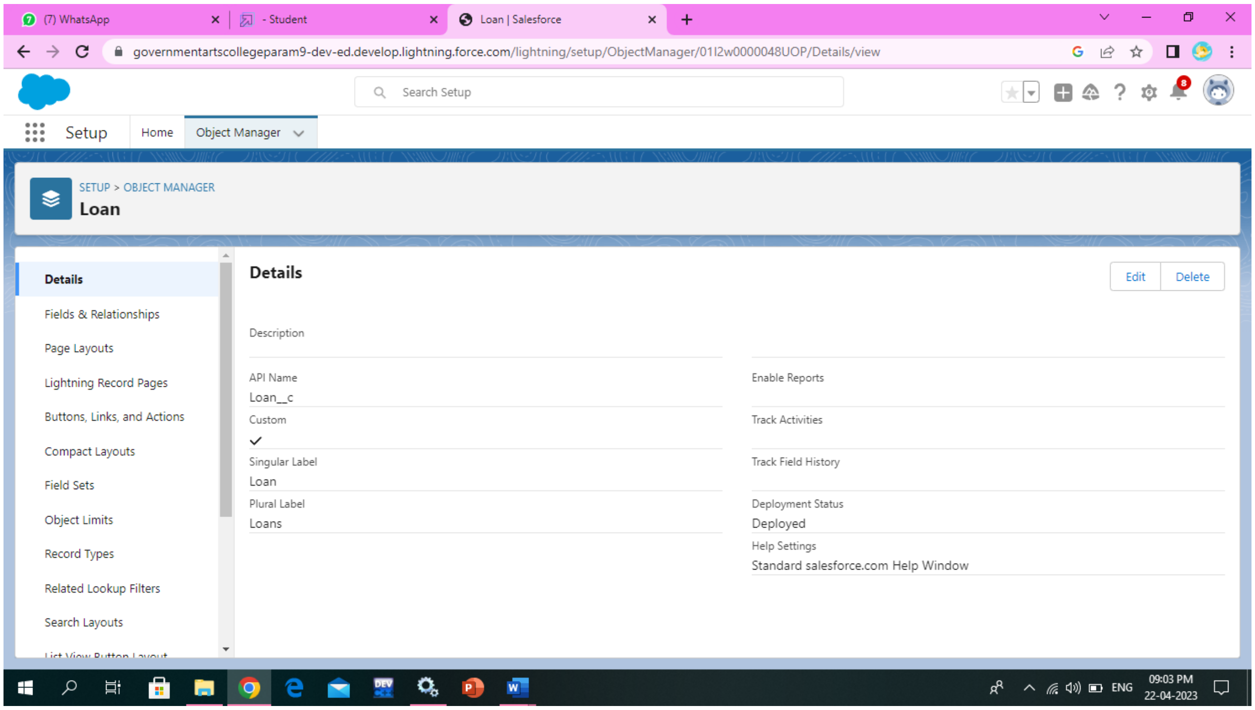
Create Object Buy



Create Object Rent



Create Object Loan



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.

Create The Lightning Tab

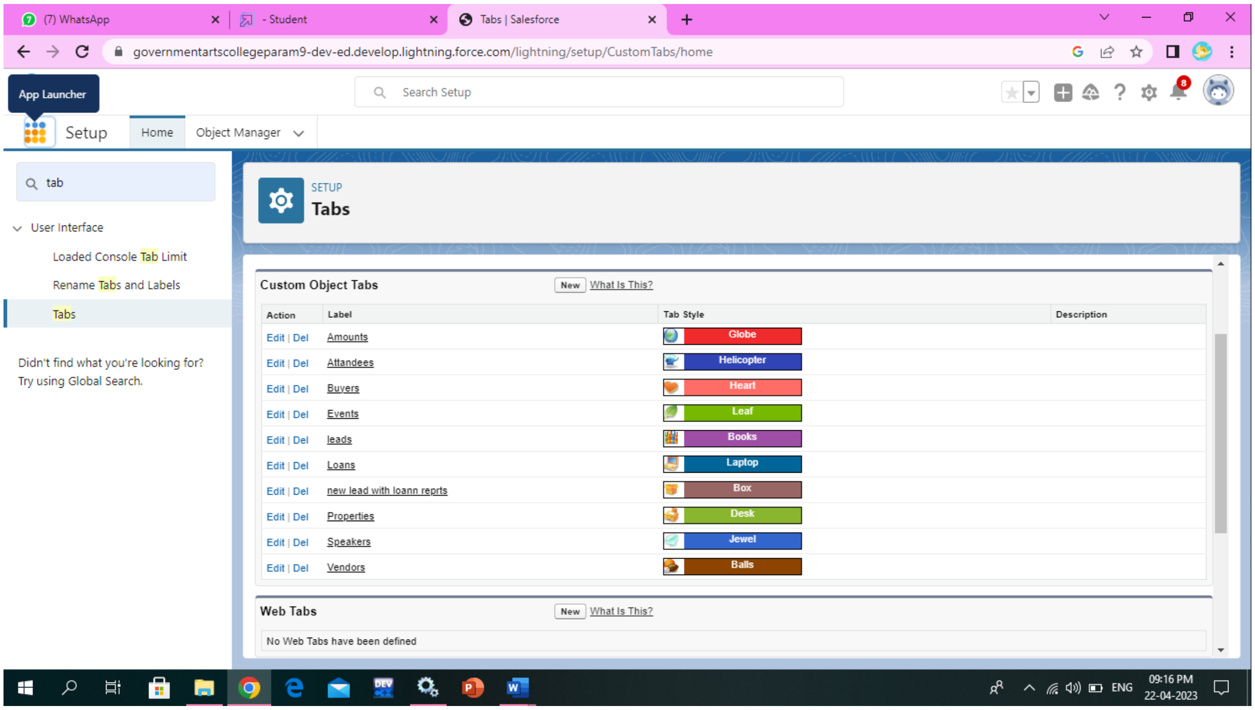
To create a Tab:(Lead)

1. Go to setup page then type Tabs in Quick Find bar then click on tabs then New (under custom

object tab)

2. Select Object(Lead) then Select the tab style then Next (Add to profiles page) keep it as

default then Next (Add to Custom App) keep it as default then Save.



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.

Create The Lightning App

1. Go to setup page then search “app manager” in quick find then select “app manager” then click on New lightning App.

2. Fill the app name as an Property Management in app details and branding then Next then (App option page) keep it as default then Next

3. (Utility Items) keep it as default then Next then(Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) then Next then (Add User Profile) Add System Administrator, Salesforce

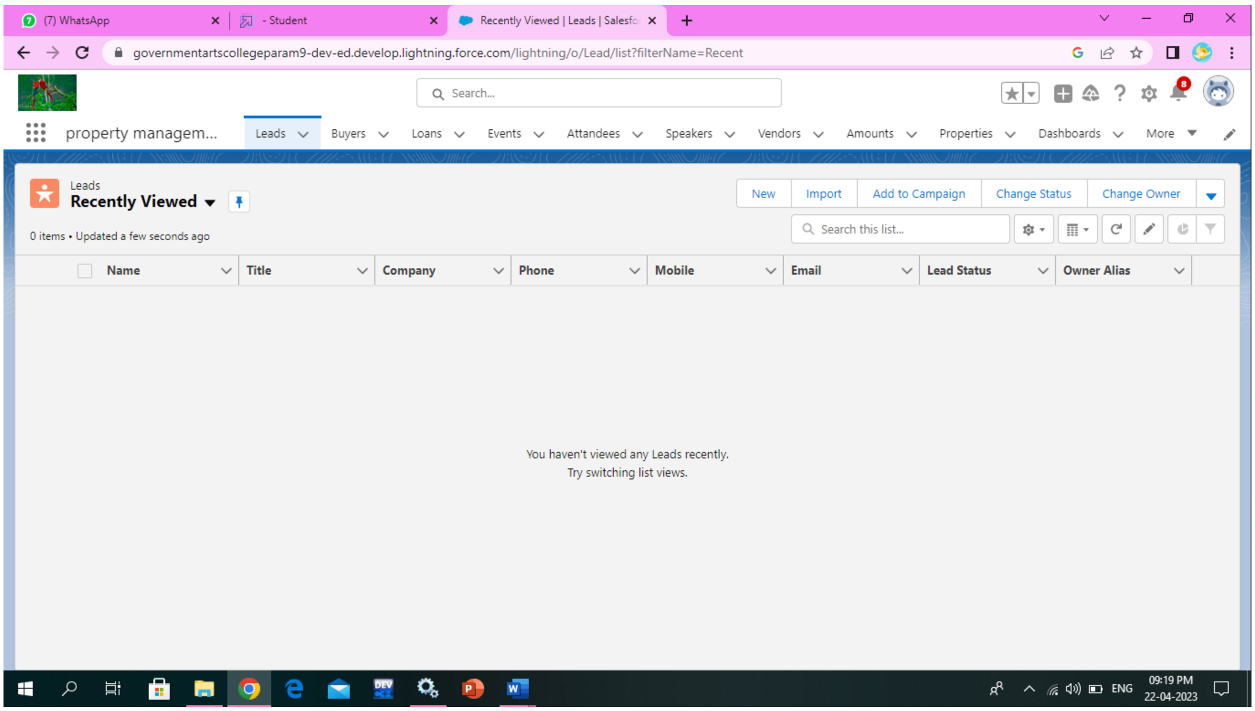
platform user, Standard User then Next.

4. To Add Navigation Items:

Select the items from the search bar and move it using the arrow button then Next.

5. To Add User Profiles:

Search profiles in search bar then click on the arrow button then save & finish.



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,

1. Created By

2. Owner

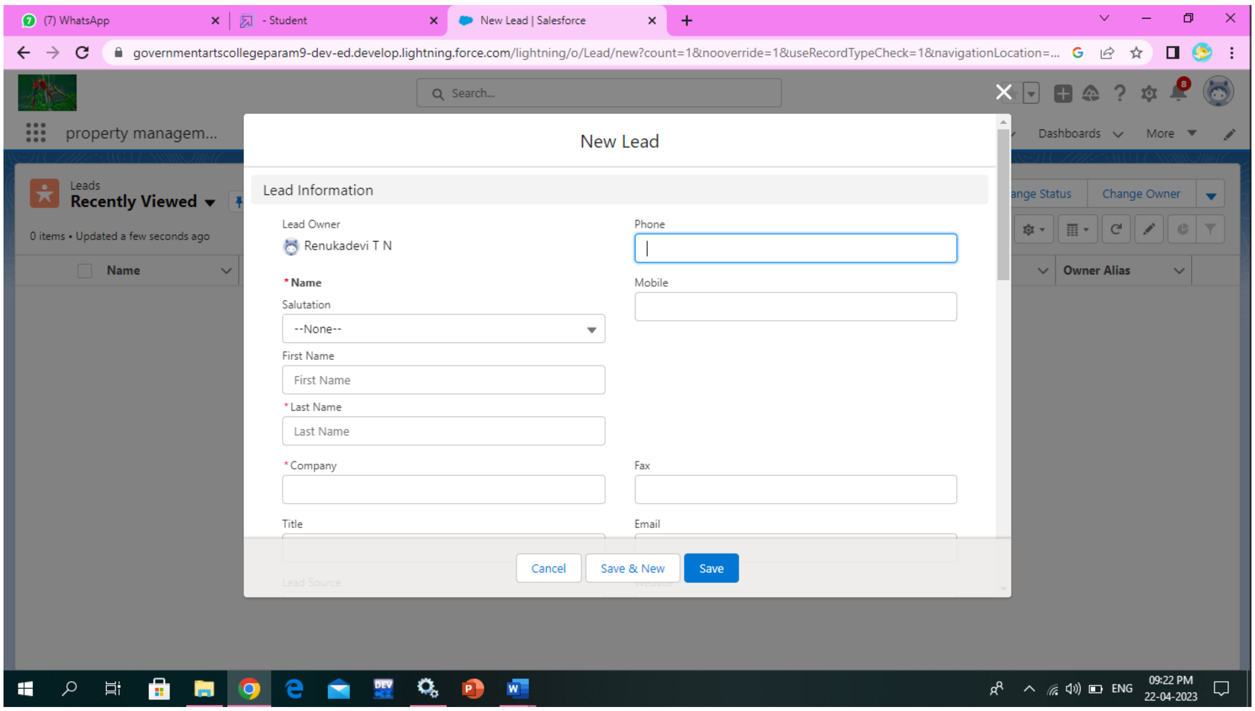
3. Last Modified

4. 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.

Create The Lead Field



Create For Object Buy

1. Create Field for Buy

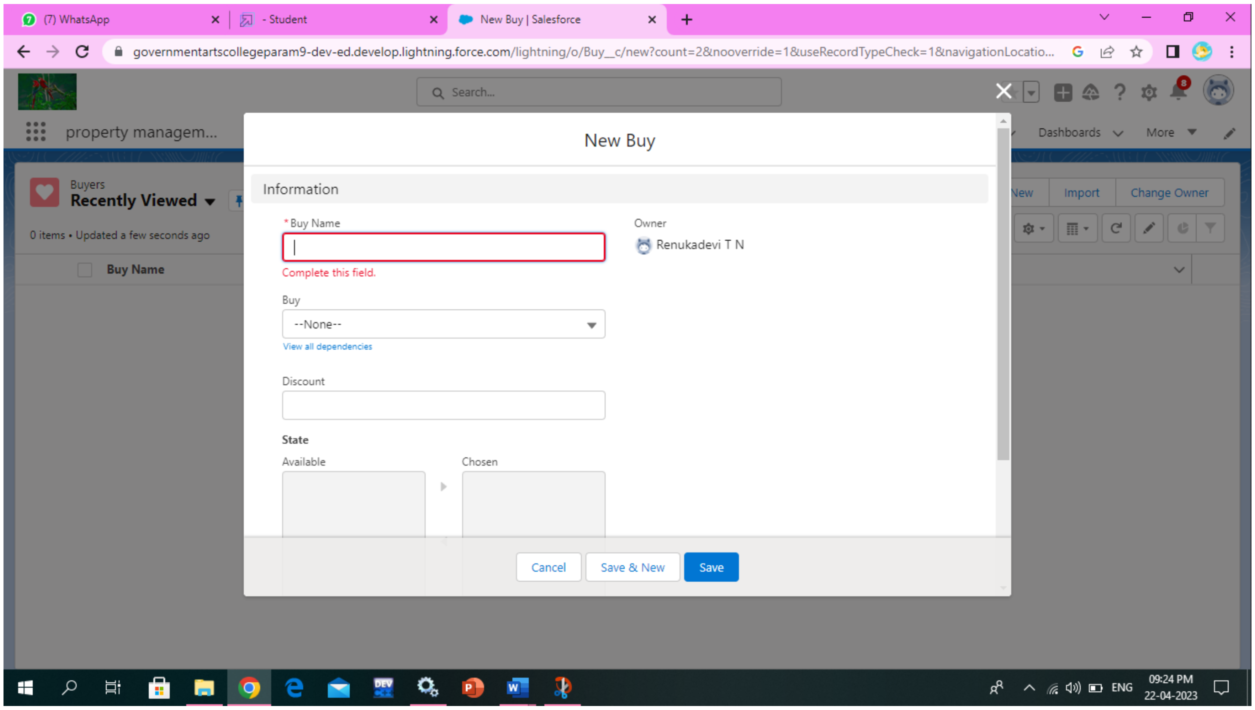
2. Create Property Type: (Picklist) (Residential, Commercial, Industrial)

3. Discount:(Percentage As the Field Data Type)

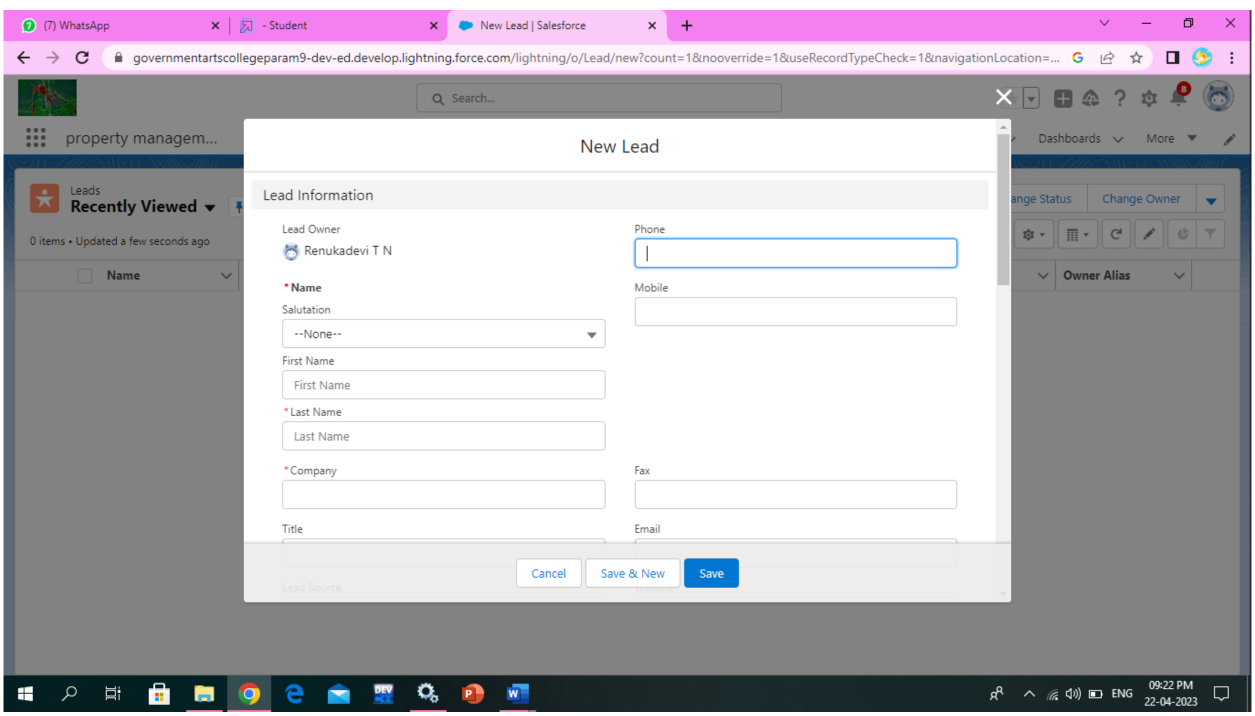
4. State:Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

5. City:(Take Any City for Field Dependency)

6. Annual Amount To Be Paid



Create Field For Loan



Profile

1. A profile is a group/collection of settings and permissions that define what a user can do in salesforce.

2. 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.

3. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

A. Standard profiles:

1. By default salesforce provide below standard profiles.

2. We cannot deleted standard ones

3. Each of these standard one includes a default set of permissions for all of the standard objects available on the platform.

B. Custom Profiles:

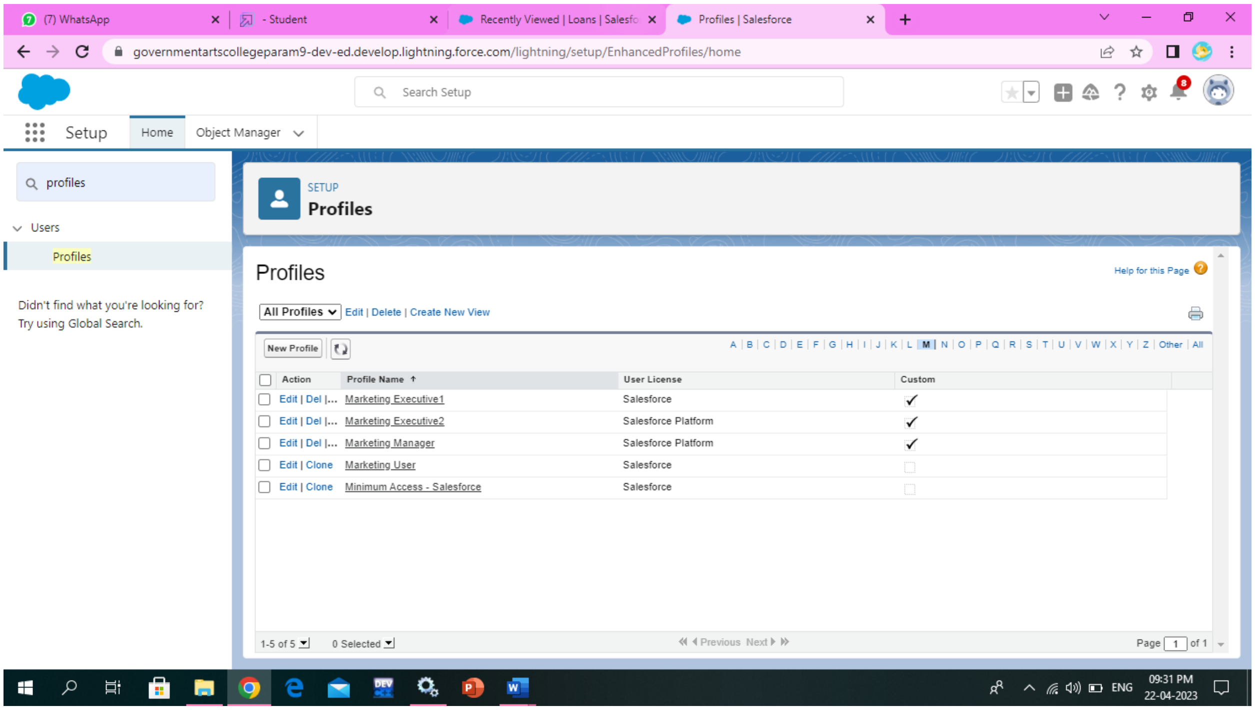
1. Custom ones defined by us.

2. They can be deleted if there are no users assigned with that particular one.

Create Marketing and sales:

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



New User

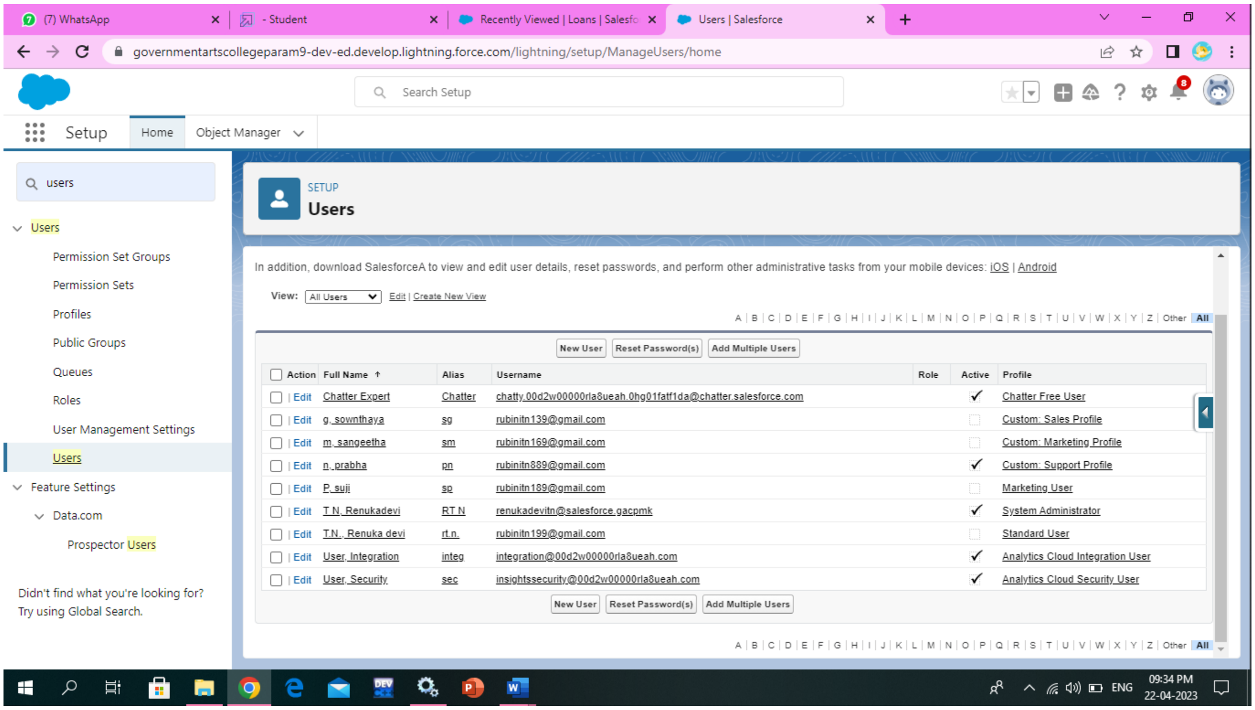
1. A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.

2. 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.

Create User

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

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



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.

Create The Permission Sets

1. Go to setup then type “permission sets” in quick search then select permission sets then New.

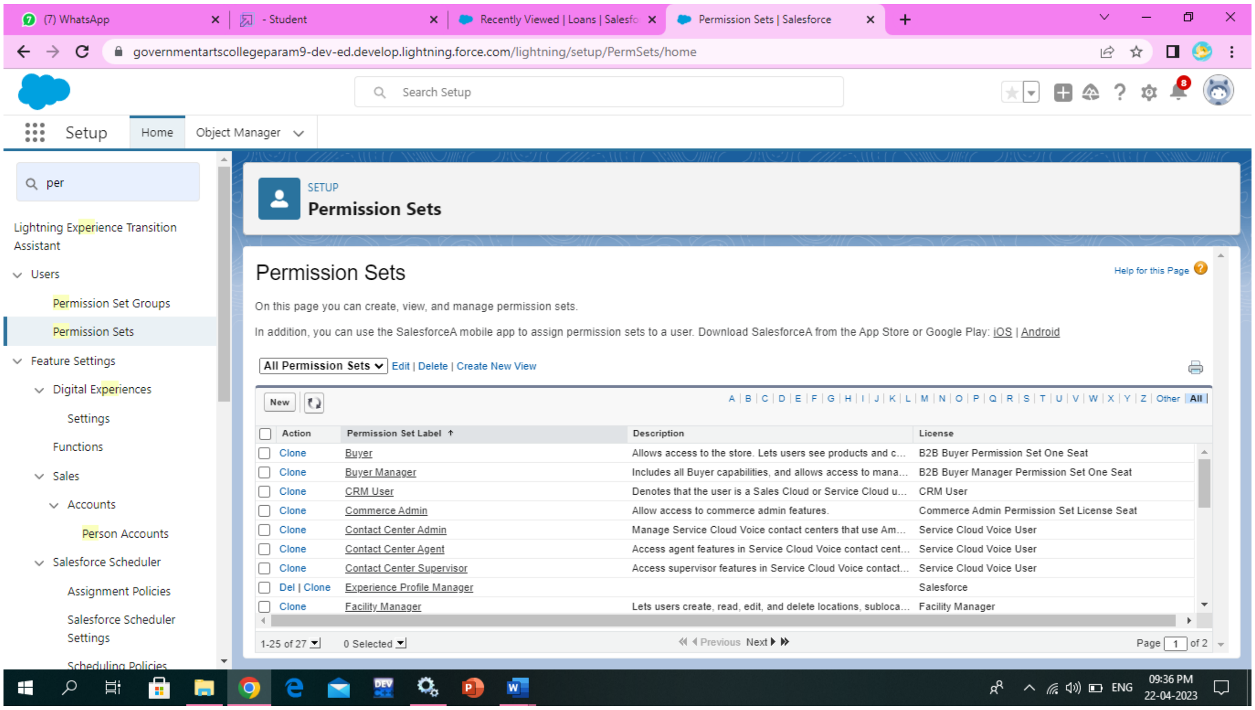
2. Enter the label name then save.

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 User



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-

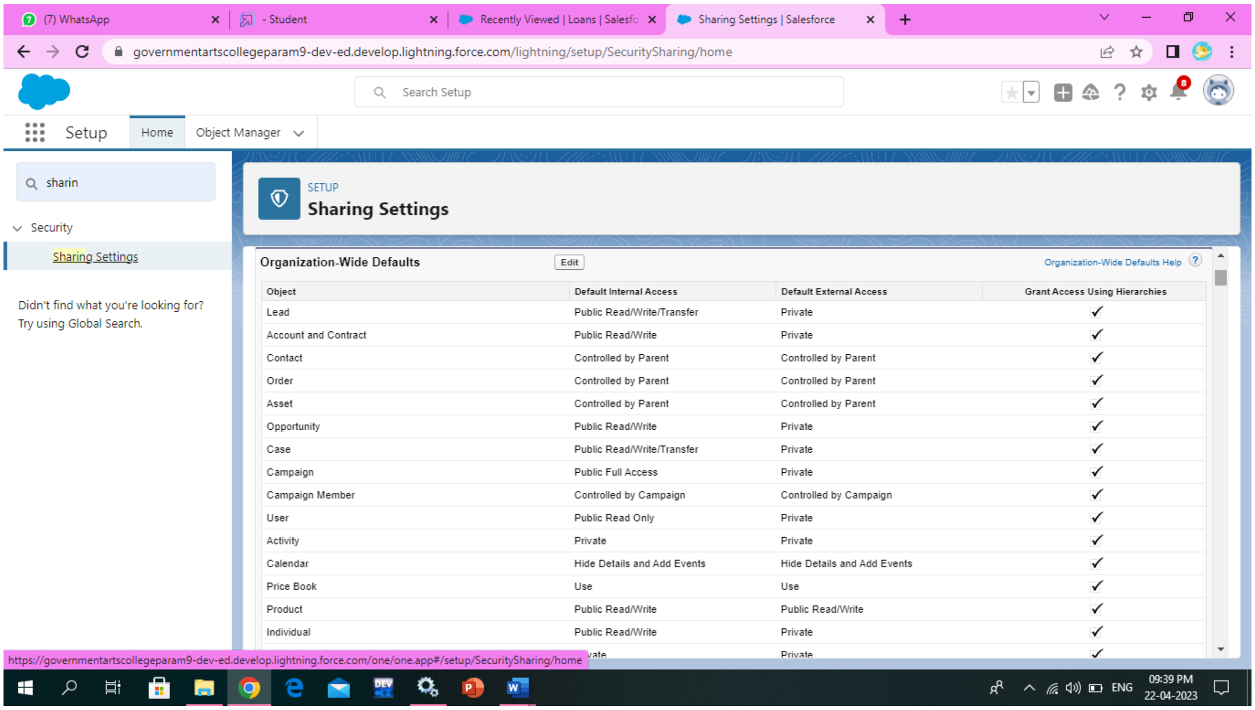
1.Public Read/Write/Transfer (only available of Leads and Cases)

2. Public Read/Write

3. Public Read/Only

4. Private

Create OWD Setting



Marketing & Sales

Marketing

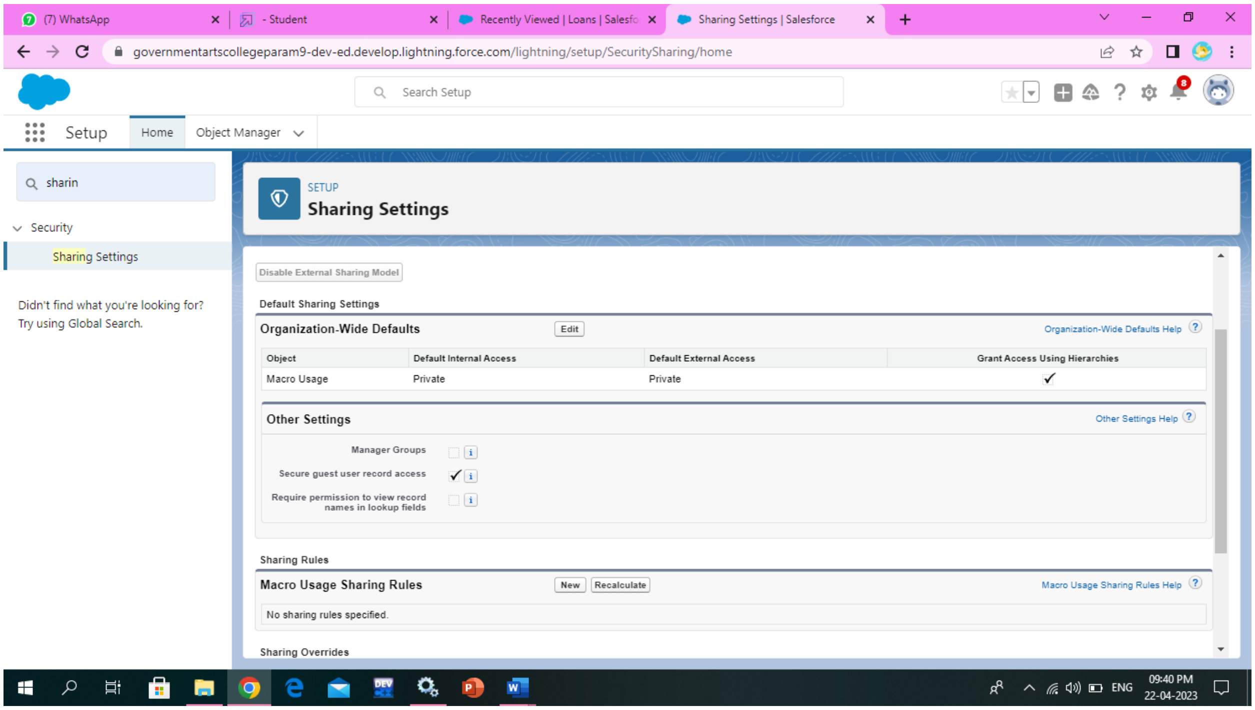
1. Create the Record Level OWD Setting give it As A Private To Marketing manager And Marketing Executive

Sales

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

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).

Always we are explain about this......



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

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Create Report

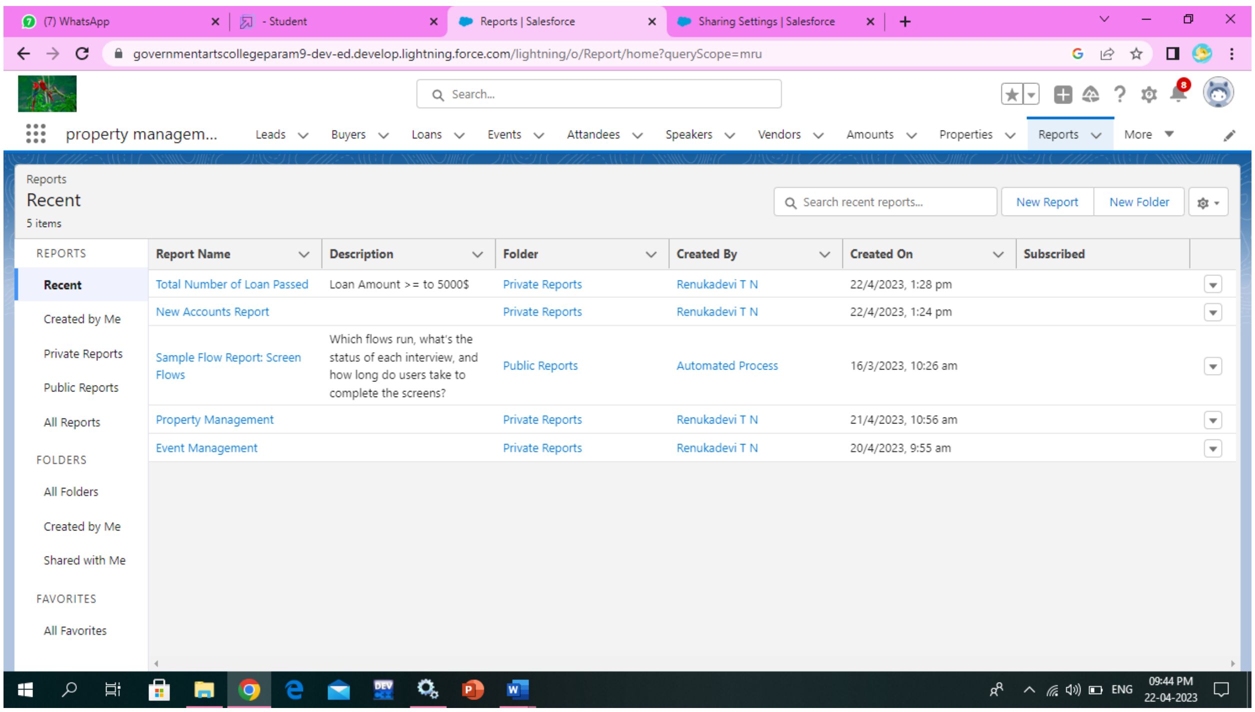
1. Go to the app then click on the reports tab

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.



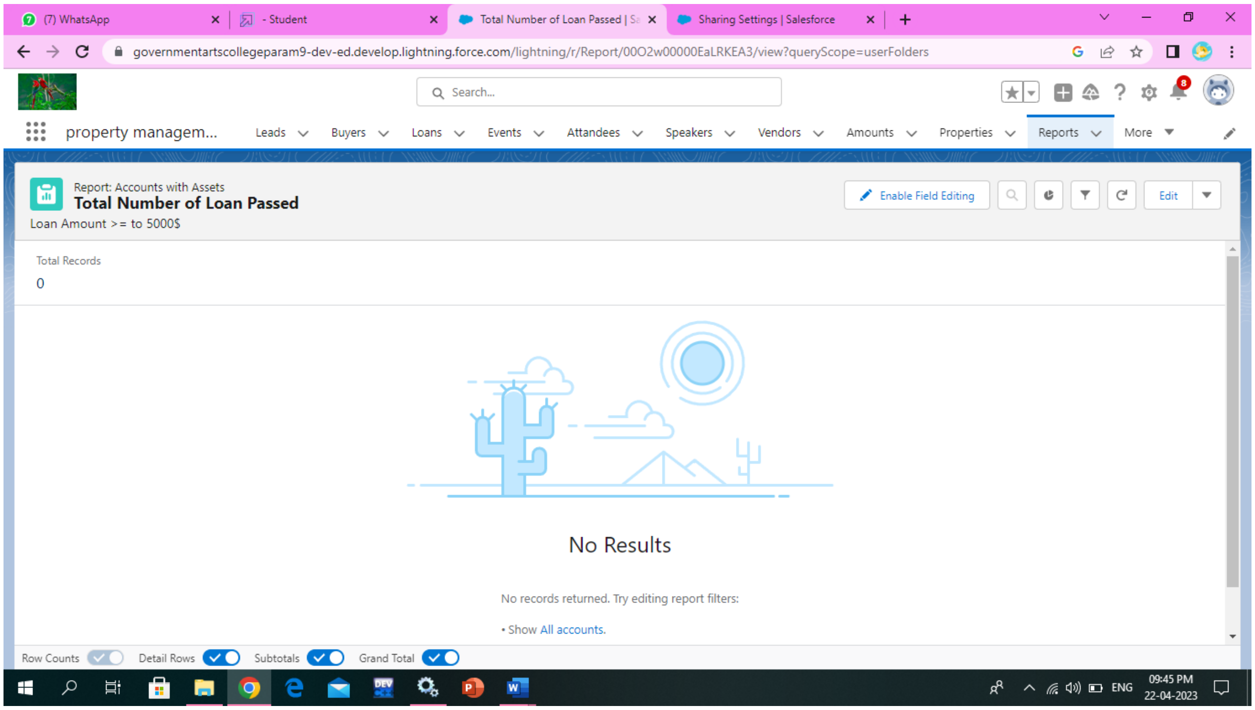
Create Report 2

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$



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.

Create Dashboards

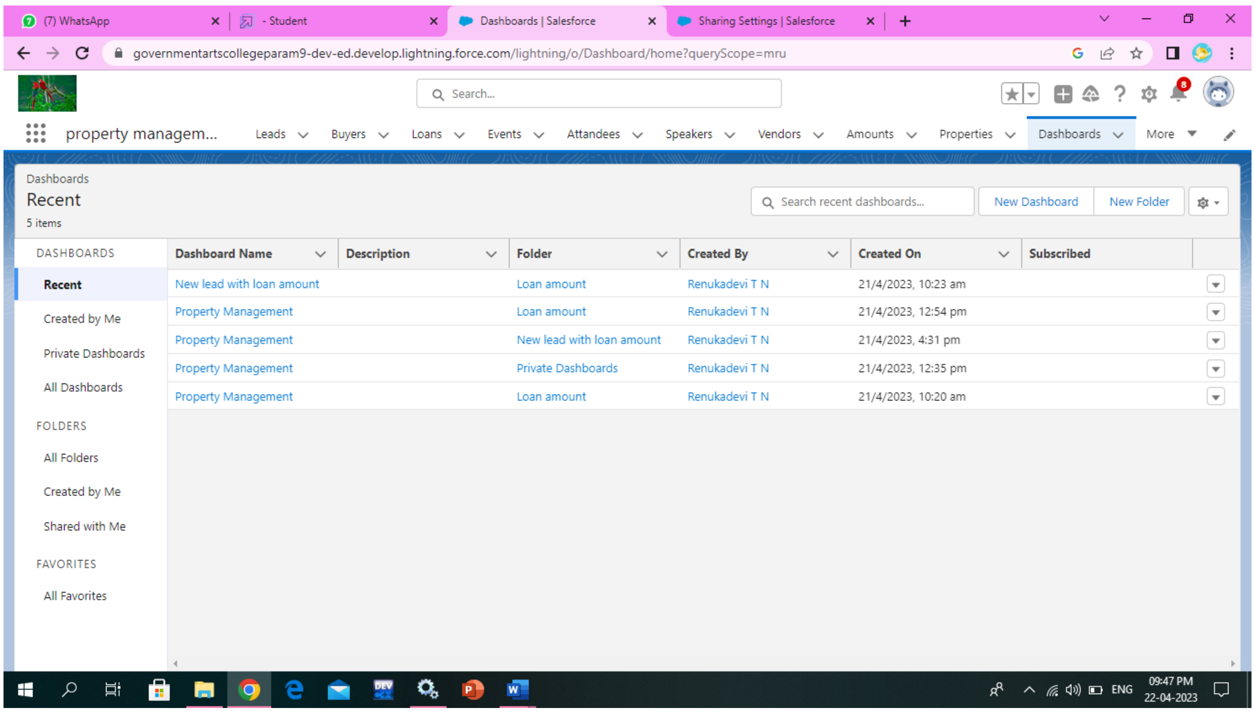
1. Go to the App Launcher and select the Dashboards

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

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



Trailhead URLs:

Team Lead - https://trailblazer.me/id/sujip7

Team Member 1 – https://trailblazer.me/id/rentn

Team Member 2 – https://trailblazer.me/id/smuthukumar14

Team Member 3 – https://trailblazer.me/id/sowng1

Benefits of Salesforce CRM

While the base of what makes Salesforce CRM one of the most evident customer relationship management tools is prominent, its benefits help a business reach customer expectations. These benefits include:

1. Automation Tools

For any business to prosper, communication with customers needs to be top-notch. After all, the delayed response triggers or pushes away potential and an existing customer to the competitors. However, with Salesforce, companies no longer have to worry about delayed reactions anymore. It is because of the automation tools it uses to initiate instant communication with the customers through chats on its website.

2. Data Analytics Tools

With the help of data analytic tools, companies keep track of the customer's past records and help themselves understand better customers' expectations and requirements. Ultimately, with the help of data analytic tools, company's can set up marketing campaigns and strategies to bring more engagement to their sites.

3. Tracking Customer Activity

To gain any customer's loyalty, a company will have to understand the details and behavior of their customer's activities. Salesforce CRM has a Sales Cloud feature that allows the company to track customer's records, contact details, backgrounds, etc. that can help a company make practical changes to its strategies and plans for better performances.

4. Data Syncing

You must know that several social media sites allow users to syncing their data from one platform to another in some capacity. Salesforce Mobile App also allows for such data syncing where your business can integrate data from different apps in one place. Such flexibility offered by Salesforce CRM ensures that your company has an easier time analyzing all the essential data to be more efficient.

5. Customer Assistance

With the pandemic in effect, practicing social distancing is exceptionally critical. As a result, businesses must provide methods to their customers that they can use for interaction with the company virtually. Salesforce's online chat feature, Live Agent, is a great chat box to accomplish that goal.

6. Omnichannel Feature

Replying to numerous customers at a time can be difficult. I mean, whoever can have an easier time switching between multiple accounts to respond to their followers without delay? Nobody. Salesforce service control provides an omnichannel feature that brings a unified approach that provides customers a consistent experience and helps the company.

7. Customer Engagement

It is a proven method that consistent engagement with customers is what helps a company gain loyalty. Also, for any company's long-term sustainability and profit, it is crucial to have loyal customers. Loyal customers help businesses grow through their organic positivity word of mouth by bringing in more eyeballs to the brand or its product and services. With Salesforce, a company can launch several marketing campaigns that can help bring in personal engagement with the existing customers, such as email marketing.

8. Keeps the Audience in One Place

For effective management and processing of essential measures, a company must keep all its user's and customer's data in one place. It helps with organizing and analyzing the data in the best possible manner. Salesforce includes Sales Cloud, Service Cloud, and Analytics for its users to ensure better Customer Relationship Management (CRM).

9. Builds App

Nowadays, many people have a mobile phone. Also, more than browsing about a product and service, customers prefer looking out for apps that help them accomplish such activities. After all, customers find apps more convenient and easier to use than browsing multiple pages on a web browser to land the information they have been looking for, for so long. With Salesforce CRM, companies can even build their apps to ensure better connectivity and engagement with their customers.

10. Gather Insights

In any business, the more knowledge you will have about your customers, the better your chances of success will be. Having more knowledge about the customers will help you better understand what's working and what isn't. Salesforce CRM has Marketing Cloud Insights that ensure its users can comfortably gather insights related to their customers. With the Marketing Cloud Feature, you can analyze the customers' behavior and detect the latest trends bringing in better.

Thank you!