

GOVERNMENT ARTS FOR WOMEN

SALEM-08

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PROPERTY MANAGEMENT APPLICATION

USING SALESFORCE

1.INTRODUCTION

1.1 OVERVIEW

Develop an App for the propertyManagement 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 repots on the count of loan passed getting the property purchased close the deal.

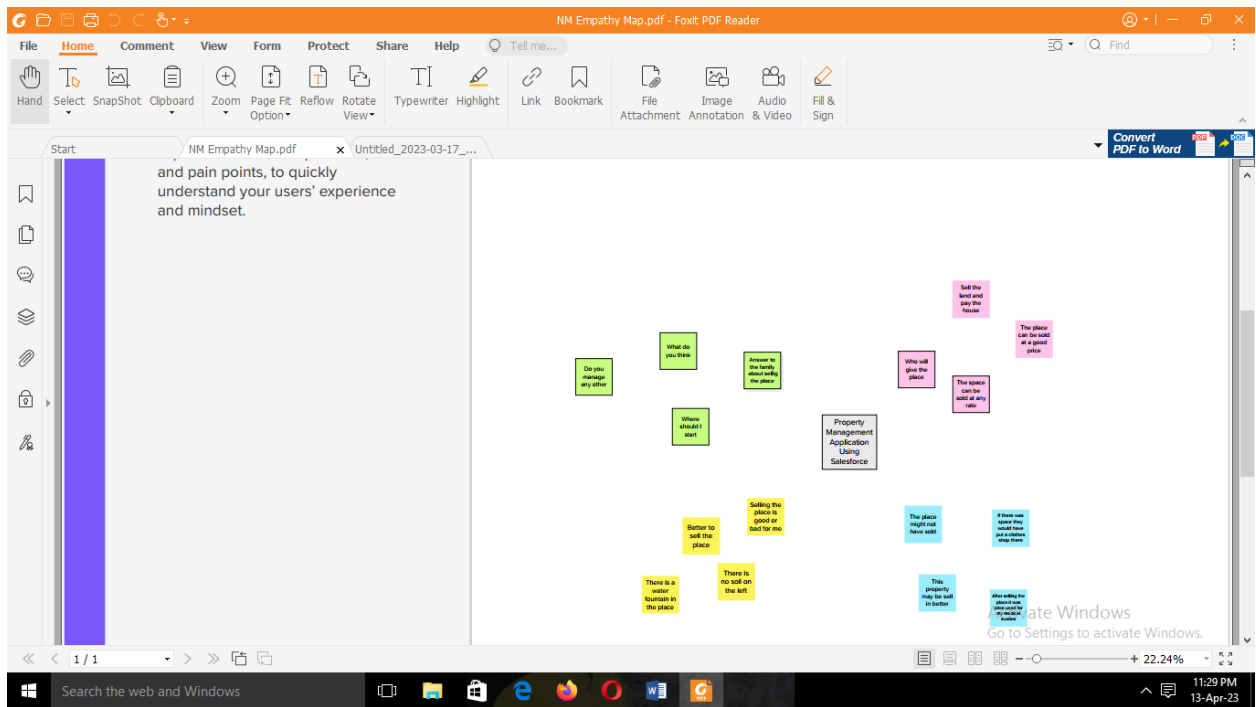
1.2 purpose

Property Management provides structure and control of the project environment so that the agreed activities will produce the right products or services to meet the customer's expectations. Projects are temporary structures which must be properly managed and controlled

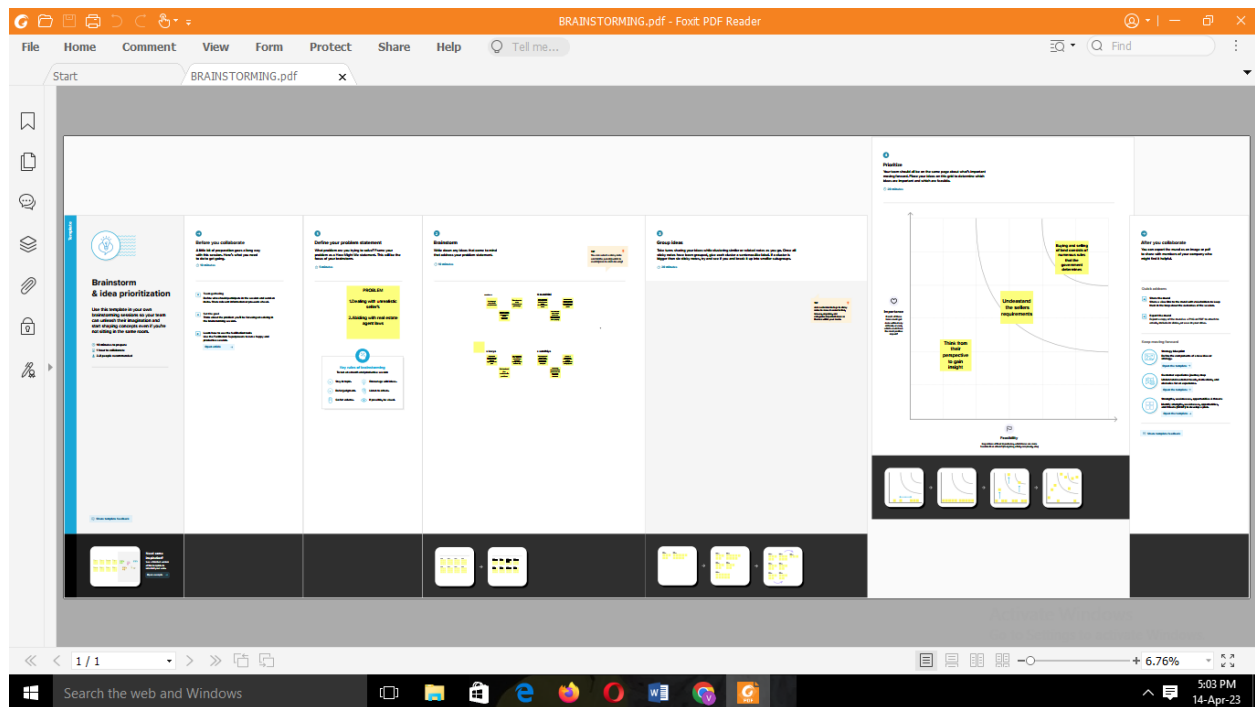
in order to meet their stated objectives.

2.PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION AND BRAINSTORMING MAP



3.RESULT

Milestone 1: Salesforce

Activity:

Creating Developer Account

Creating a developer org in salesforce.

- ⇒ *Go to [developer. Salesforce. com/](https://developer.salesforce.com/)*
- ⇒ *Click sign up*
- ⇒ *Enter the details:*

First name& Last nam,Email,Role:Developer,

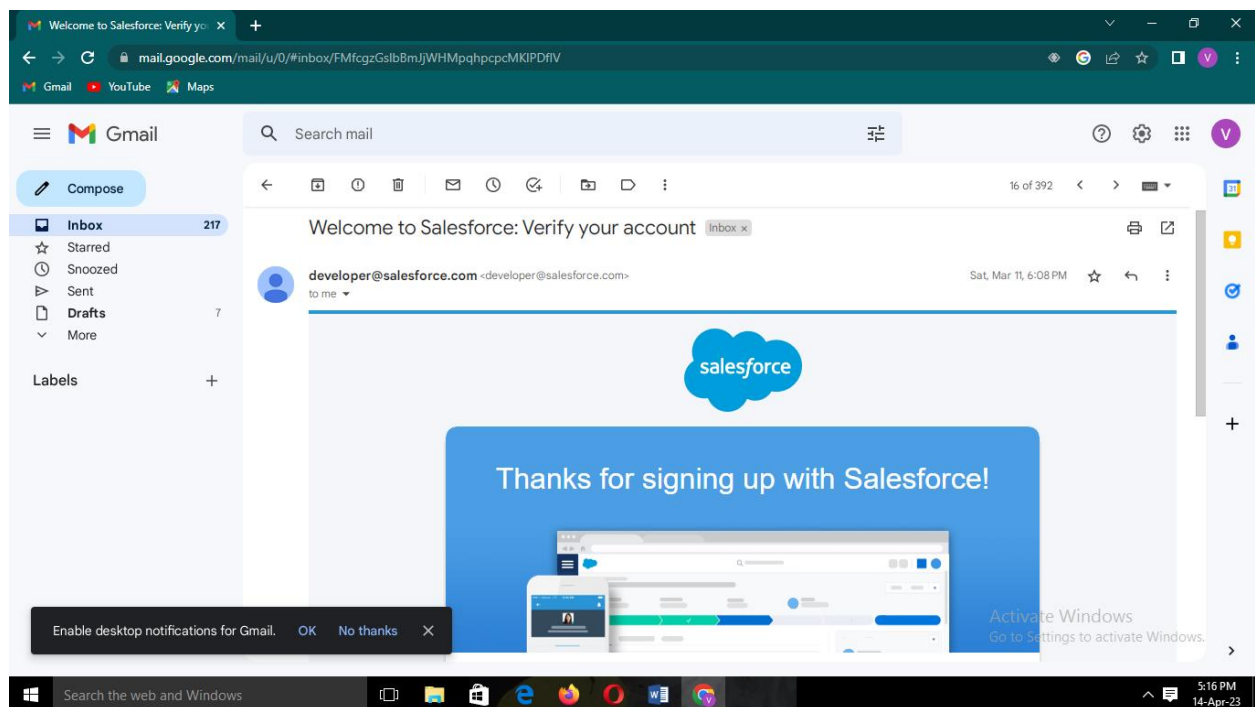
Company Name:GACW, Country:India,Postal code,

Username:as like username@organisation.com

⇒ *Sign up*

You received mail for account activation. Go to Salesforce and click login

⇒ *Enter username and password*

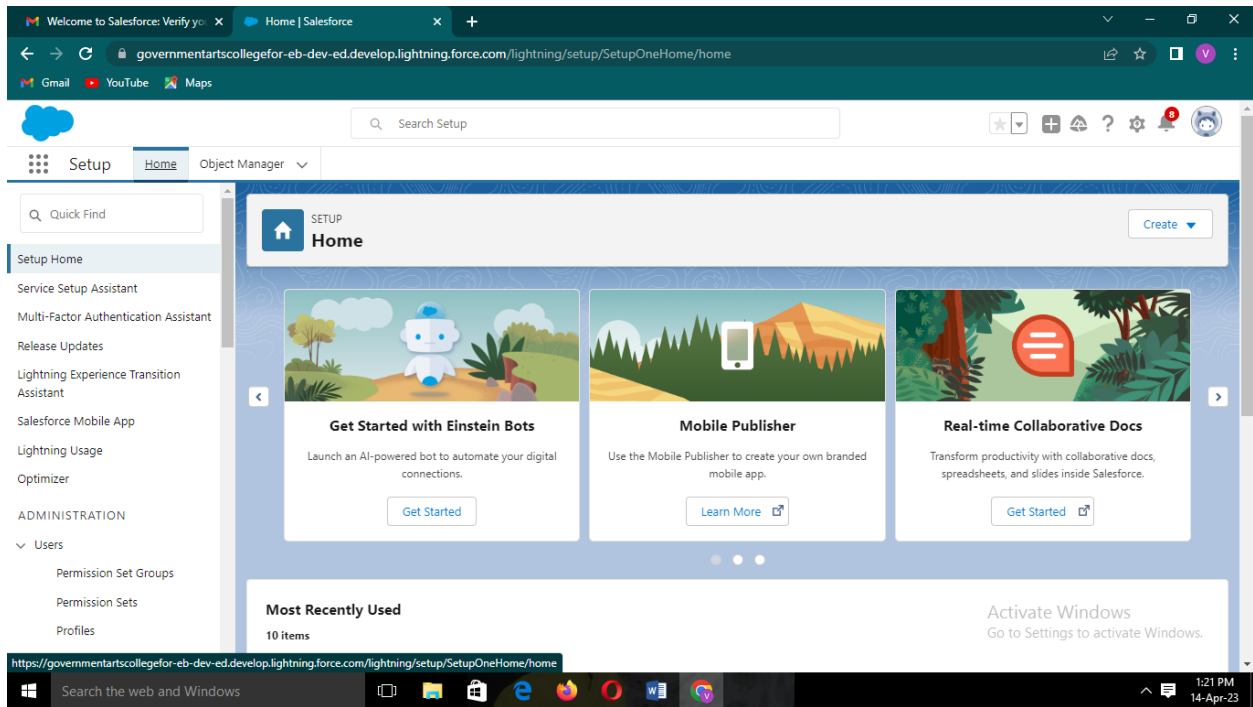


Milestone 2:Object

Activity:

To Navigate to setup page:

⇒ *Click on gear icon → click setup.*



To create an object:

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

On Custom object defining page:

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

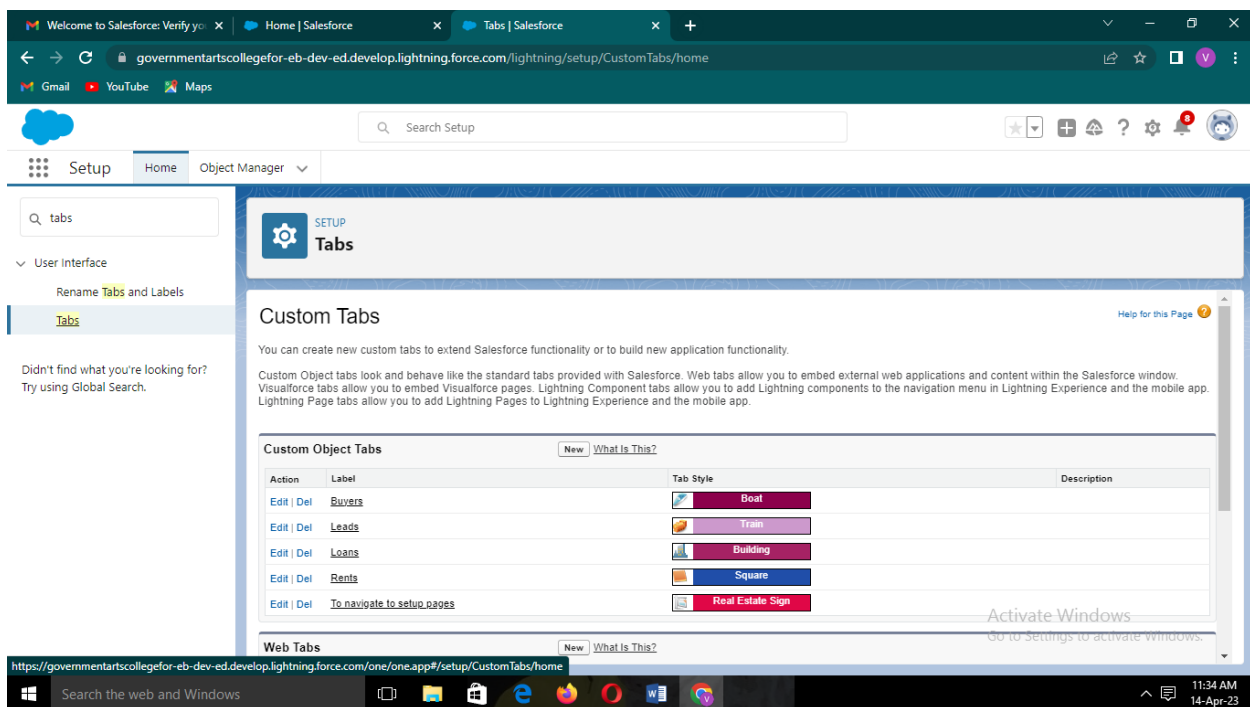
Milestone 3: Tab

Activity:

Create the Lightning Tab:

To create a Tab:(Lead)

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



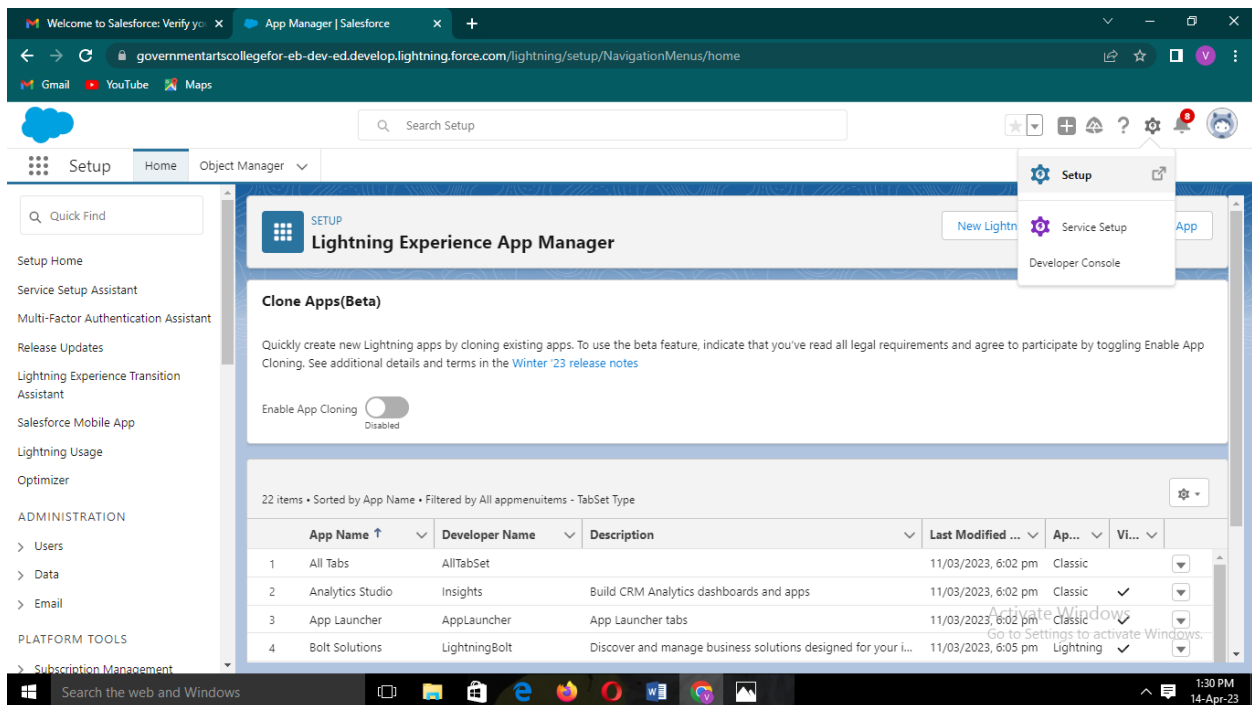
⇒ Select Object(Lead) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to custom app) keep it as default → Save.

Milestone 4: The Lightning App

Activity:

Create the Lightning App:

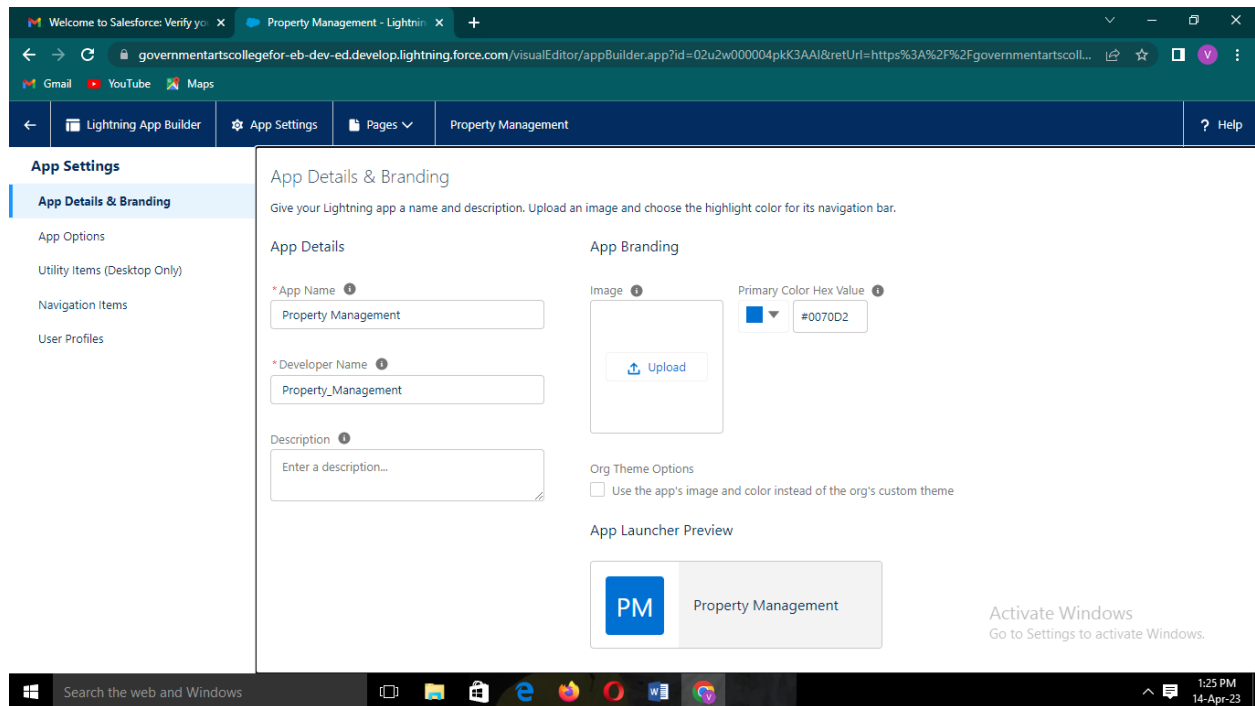
⇒ Go to setup page → search “app manager” in quick find → select “app manager” → click on New Lightning App.



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

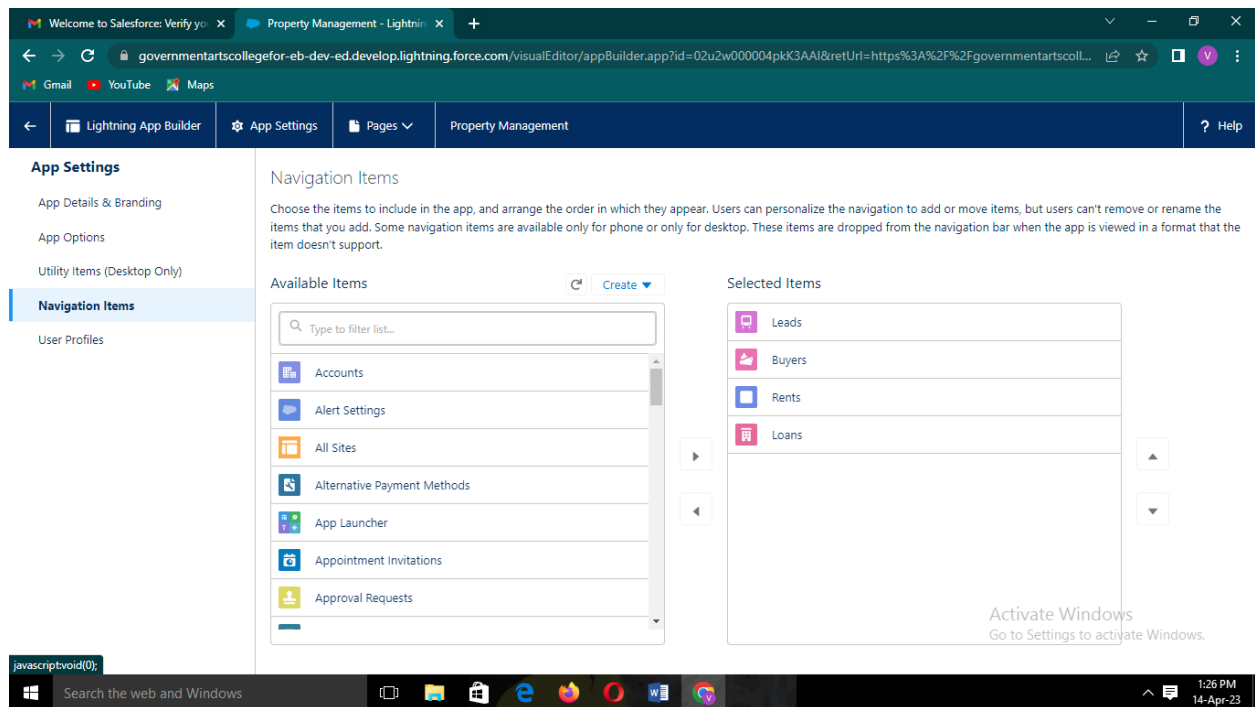
⇒ (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy, Rent,

Loan)→Next→(Add User profiles) Add system Administer, Salesforce platform user, Standard User→Next.



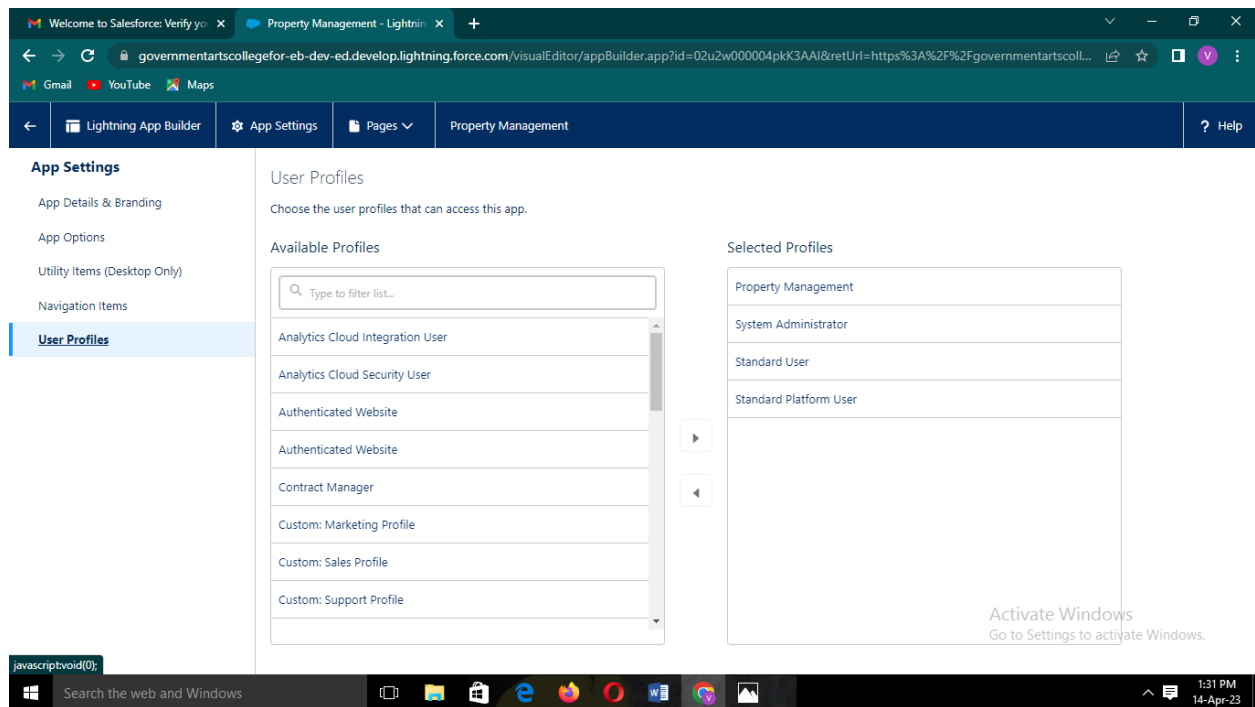
To Add Navigation Items:

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



To Add User Profiles:

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



Milestone 5:Fields

Activity:

Create the Lead Field:

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

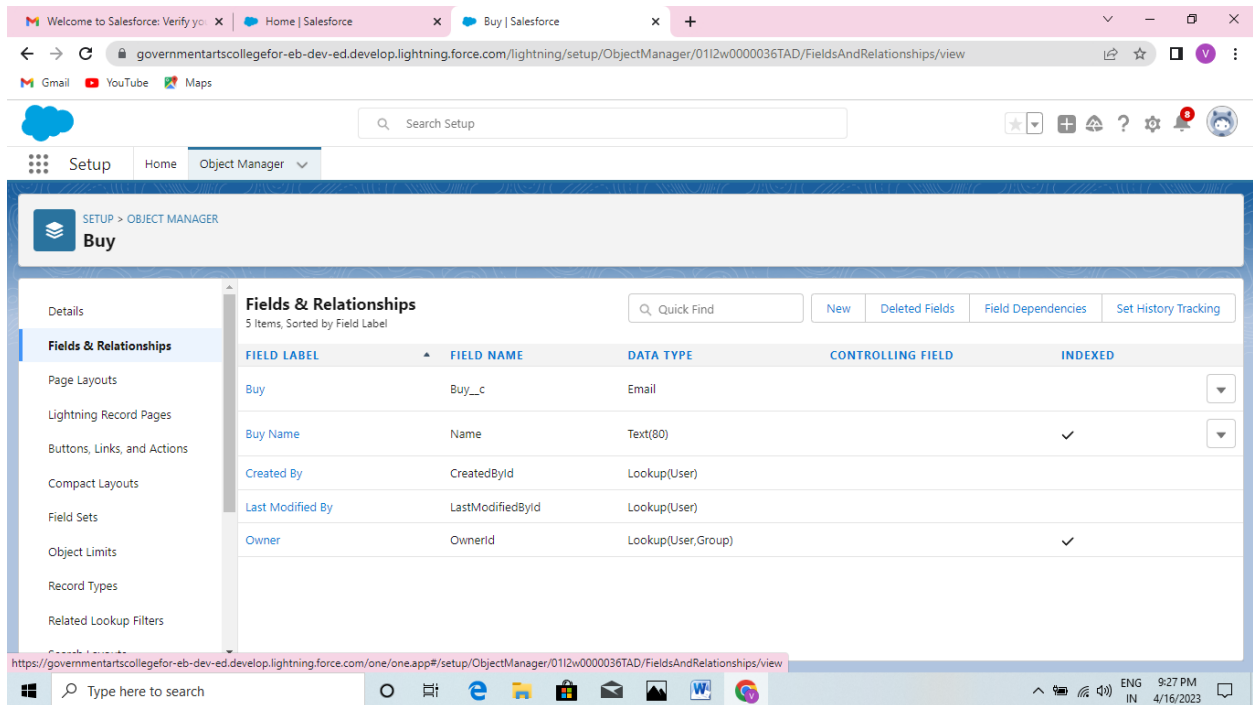
the object.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Object Manager' header includes a search bar with 'buy' entered, a 'Schema Builder' button, and a 'Create' dropdown. The main content area displays a table with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Buy	Buy__c	Custom Object		18/03/2023	✓

Below the table, there's a large empty space. At the bottom of the interface, there's a Windows taskbar with a search bar and various application icons. The system tray shows the language as 'ENG IN' and the time as '9:13 PM 4/16/2023'.

Now click on "Fields & Relations"



ships" → New.

Fill the field label name

Lead → Next → Next → Save.

Milestone 6: Profile

Activity:

To create a new profile:

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

⇒ Enter a profile name

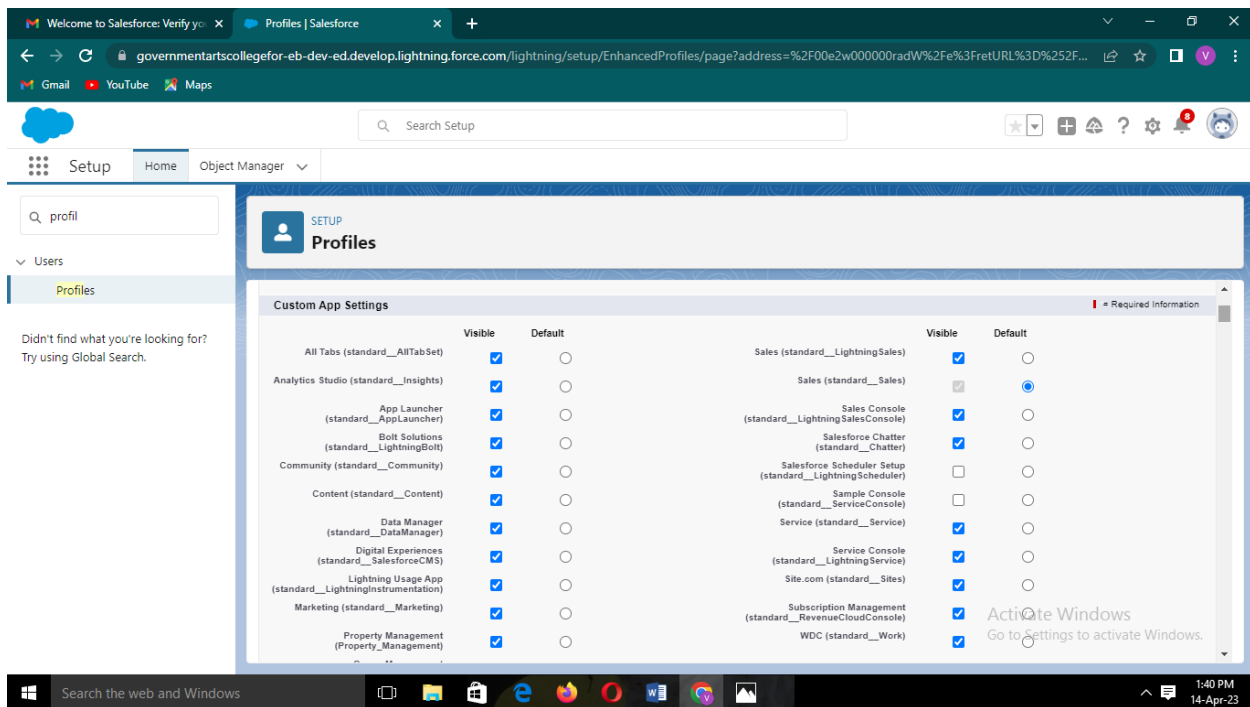
⇒ Click on the new created profile

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

The screenshot shows the Salesforce 'Profiles' page. The left sidebar has a search bar with 'profil' and a 'Profiles' link. The main content area is titled 'Profiles' and shows the 'Profile Detail' for a custom profile named 'Property Management'. The profile is created by 'Vanitha V.' on 20/03/2023 at 7:57 pm. Below the profile details, there is a 'Page Layouts' section with a table of standard object layouts. The table has two columns: 'Standard Object Layouts' and 'Object Layouts'. The rows include Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Asset Action, Object Milestone, Operating Hours, Opportunity, Opportunity Product, Order, Order Product, Payment, and Payment Authorization. Each row shows the current layout and a link to 'View Assignment'.

Standard Object Layouts	Object Layouts
Global	Global Layout (View Assignment)
Email Application	Not Assigned (View Assignment)
Home Page Layout	DE Default (View Assignment)
Account	Account Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)
Asset	Asset Layout (View Assignment)
Asset Action	Asset Action Layout (View Assignment)
Object Milestone	Object Milestone Layout (View Assignment)
Operating Hours	Operating Hours Layout (View Assignment)
Opportunity	Opportunity Layout (View Assignment)
Opportunity Product	Opportunity Product Layout (View Assignment)
Order	Order Layout (View Assignment)
Order Product	Order Product Layout (View Assignment)
Payment	Payment Layout (View Assignment)
Payment Authorization	Payment Authorization Layout (View Assignment)

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



Milestone 7:New User

Activity:

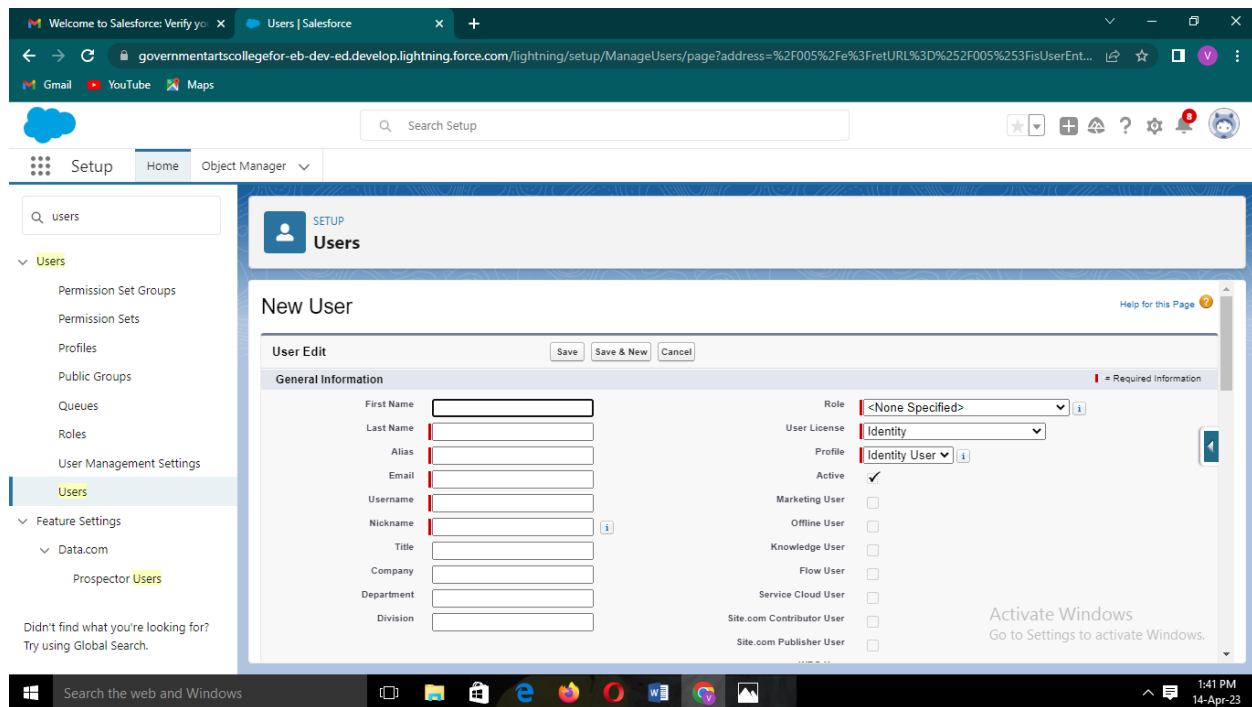
Create User:

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

The screenshot displays the Salesforce 'All Users' management page. The interface includes a top navigation bar with 'Setup' and 'Home' tabs. A sidebar on the left contains a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospector Users. The main content area is titled 'All Users' and provides instructions on how to manage users. Below the instructions, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A table lists the current users with the following columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains five entries, each with an 'Edit' link and a checkmark in the 'Active' column. At the bottom of the page, there is a section for 'Activate Windows' with a message to go to settings to activate windows.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter_Expert	Chatter	chattrv.00g2u00000rk8i9eat.gszhbcxnonrb@chatter.salesforce.com		✓	Chatter Free User
Edit	User_Integration	integ	integration@00d2w00000rk8i9eat.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	inaipbtsecurity@00g2w00000rk8i9eat.com		✓	Analytics Cloud Security User
Edit	Y_Vanitha	VV	vani16@stat.com		✓	System Administrator
Edit	Vanitha_Vanitha	vvani	vanithava2003@gmail.com		✓	Identity User

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



Milestone 8: Permission Set

Activity:

Create the Permissions Sets:

⇒ Go to setup → type “permission sets” in quick search → select permission sets → New.

Setup Home Object Manager

Search Setup

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

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

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User

1-25 of 26 0 Selected

Previous Next

Page 1 of 2

⇒ Enter the label name → save.

Setup Home Object Manager

Search Setup

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

Permission Sets

Create

Save Cancel

Enter permission set information

Label save

API Name save

Description

Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

-Choose 'None-' if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

⇒ After saving the permission click on the Manage assignment.

⇒ Now click on the Add Assignment.

⇒ Now select the users and click on save.

The screenshot shows the Salesforce interface for managing a permission set assignment. The browser address bar indicates the URL: `governmentartscollegefor-eb-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS2w000009qP8T/PermissionSetAssignment/new`. The left sidebar shows the navigation menu with 'Setup' selected, and 'Permission Sets' highlighted under the 'Users' section. The main content area is titled 'teacher permission' and 'MANAGE ASSIGNMENT EXPIRATION'. It displays a 'Select Users to Assign' section with a 'Recently Viewed' list. The list contains two items, both with the email `vanithavs2003@gmail.com`. The table has columns for 'Full Name', 'Title', 'Phone', and 'Email'. The first item is 'Vanitha Vanitha' with the title 'Property Management'. The second item is 'Vanitha V' with no title. Both items have a checkbox for selection.

	Full Name	Title	Phone	Email	
<input type="checkbox"/>	Vanitha Vanitha	Property Management		vanithavs2003@gmail.com	<input type="checkbox"/>
<input type="checkbox"/>	Vanitha V			vanithavs2003@gmail.com	<input type="checkbox"/>

Milestone 9: Setup For OWD

Activity:

Create OWD Setting:

⇒ Setup, use the Quick Find box to find Sharing Settings.

⇒ Click Edit in the Organisation-Wide Defaults area.

⇒ For each object, select the default access you want to give everyone.

The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar contains a search bar with 'sharing' entered and a list of navigation items including Security and Sharing Settings. The main content area is titled 'Sharing Settings' and includes a 'Manage sharing settings for:' dropdown set to 'All Objects'. Below this is a table for 'Default Sharing Settings' with columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists various objects and their corresponding access settings, with checkboxes for 'Grant Access Using Hierarchies'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

Milestone 10: Report

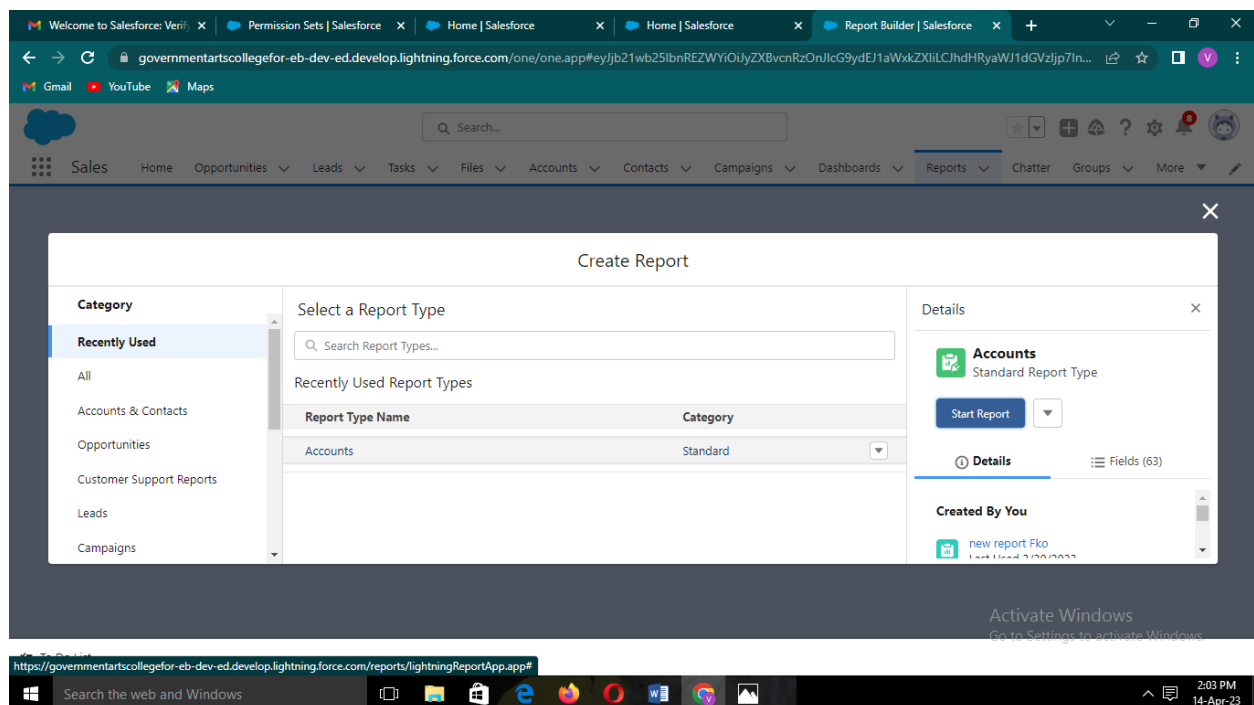
Activity:

Create Report:

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

⇒ Click New Report

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



⇒ Customize your report, then save or run it.

Milestone 11: Dashboards

Activity:

Create dashboards:

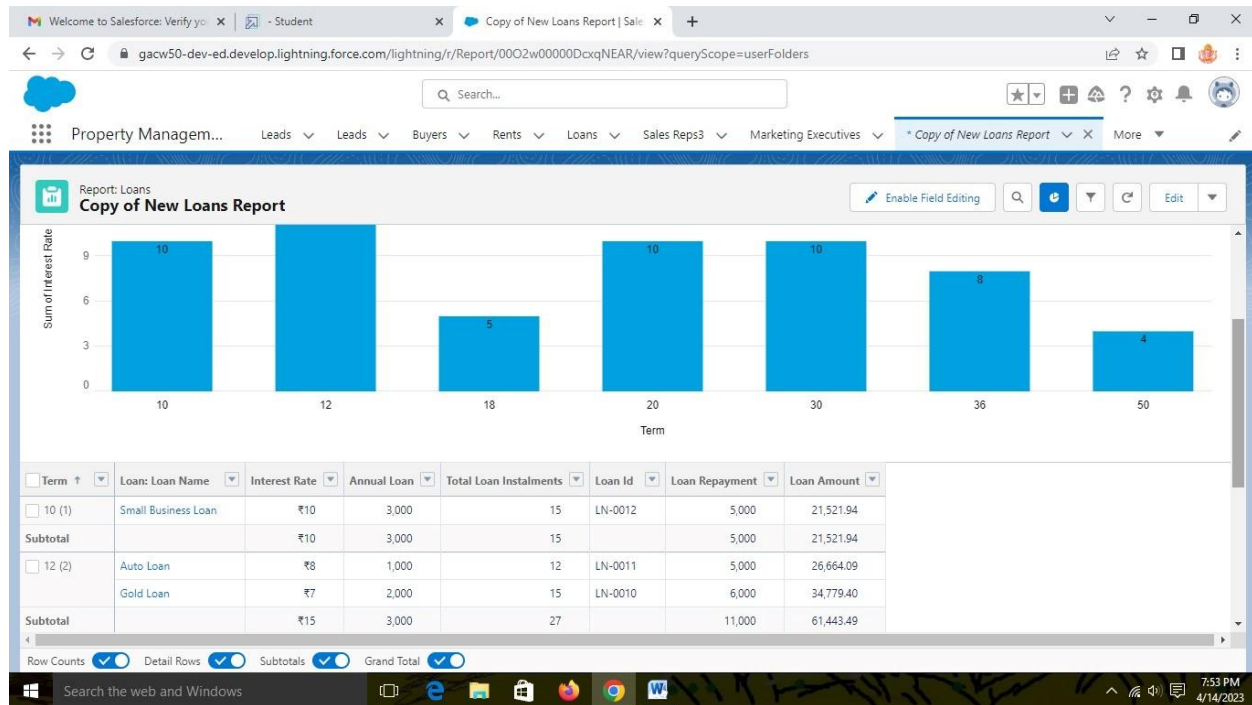
⇒ Go to the App Launcher and select the Dashboards.

⇒ Select add component.

The screenshot shows the Salesforce interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu is visible, with 'Dashboards' highlighted. The App Launcher menu is open, showing a search bar with 'das' entered. The 'Dashboards' option is selected, and a list of dashboard components is displayed. The table below shows the details of the dashboards.

Description	Folder	Created By	Created On	Subscribed
property management	new lead with loan amount	Vanitha V	15/4/2023, 7:58 pm	
property management	new lead with loan amount	Vanitha V	15/4/2023, 7:48 pm	

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



⇒Select in which format you want display chart.

3.1 DATA MODULE :

<u>OBJECT NAME</u>	<u>FIELDS IN THE OBJECT</u>	
1. LEAD		
	<i>FIELD LABEL</i>	<i>DATA TYPE</i>
	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone

2. BUY

FIELD LABEL	DATA TYPE
Property type	Text
Discount	Percentage
State	Picklist
City	Picklist

OBJECT NAME

FIELDS IN THE OBJECT

3. RENT

<i>FIELD LABEL</i>	<i>DATA TYPE</i>
Rent	Autonumber
Rental City	Text
BHK Type	Picklist

4. LOAN

<i>FIELD LABEL</i>	<i>DATA TYPE</i>
Loan Id	Autonumber
Interest Rate	Currency
Term	Number
Annul Loan	Number
LoanRepayment	Number
Loan Amount	Formula

3.2 ACTIVITY AND SCREENSHOT

4. TRAILHEAD PROFILE PUBLIC URL

Team lead - <https://trailblazer.me/id/vvanitha5>

Team Member 1- <https://trailblazer.me/id/gnandhini7>

Team Member 2- <https://trailblazer.me/id/santp23>

Team Member 3- <https://trailblazer.me/id/kavya1103>

5. ADVANTAGES

- Long-term tenants.
- More efficient rent collection.
- Lower repair and maintenance costs .

DISADVANTAGES

- Loss of control.
- Expense.
- Finding a reliable property manager.

6.APPLICATIONS

✓ A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties.

✓ PMS is also used in manufacturing industries, local government and manufacturing.

7.CONCLUSION

✓ Property Management System (PMS) software is very crucial for all the Hostels.

✓ Especially Opera PMS constitutes the most appropriate PMS software for Hilton Athens. It is user friendly, connects with Central Reservations System (CRS), Point of sale (POS) etc.

✓ Provides all the tools the hotel needs in order to operate effectively.

8.FUTURE SCOPE

✓ Property Management deals with the management of personal, commercial or industrial real estate.

✓ The growing population, overall economic growth of the country, rising income levels and increased foreign investment has led to a heightened need for improved infrastructure across urban, semi-urban and rural India.