

**Project Report:**

## **Property Management System using Salesforce**

**submitted by :**

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## **Abstract:**

This project aimed to develop a comprehensive Property Management System leveraging the Salesforce platform. The system was designed to empower property managers with tools for efficient property listing, tenant management, and maintenance request handling. By harnessing the capabilities of Salesforce, the application provides a seamless user experience for property managers.

## **Introduction:**

The Property Management System is a sophisticated web-based application that addresses the challenges faced by property managers in today's dynamic real estate environment. It streamlines the process of property management, offering a centralized platform to monitor and manage properties, tenants, and maintenance requests. Through intuitive design and robust functionality, the system significantly enhances the operational efficiency of property management.

## **Project Overview:**

The system encompasses a range of features to cater to the diverse needs of property managers:

**Property Listing and Details:** Enables easy creation and management of property listings with detailed information including location, amenities, and rental terms.

**Tenant Management:** Facilitates the onboarding of tenants, including lease agreements, contact information, and rental history tracking.

Maintenance Request Handling: Provides a seamless channel for tenants to submit maintenance requests, streamlining the process for property managers.

Reporting and Analytics: Equips property managers with valuable insights through customizable reports and analytics.

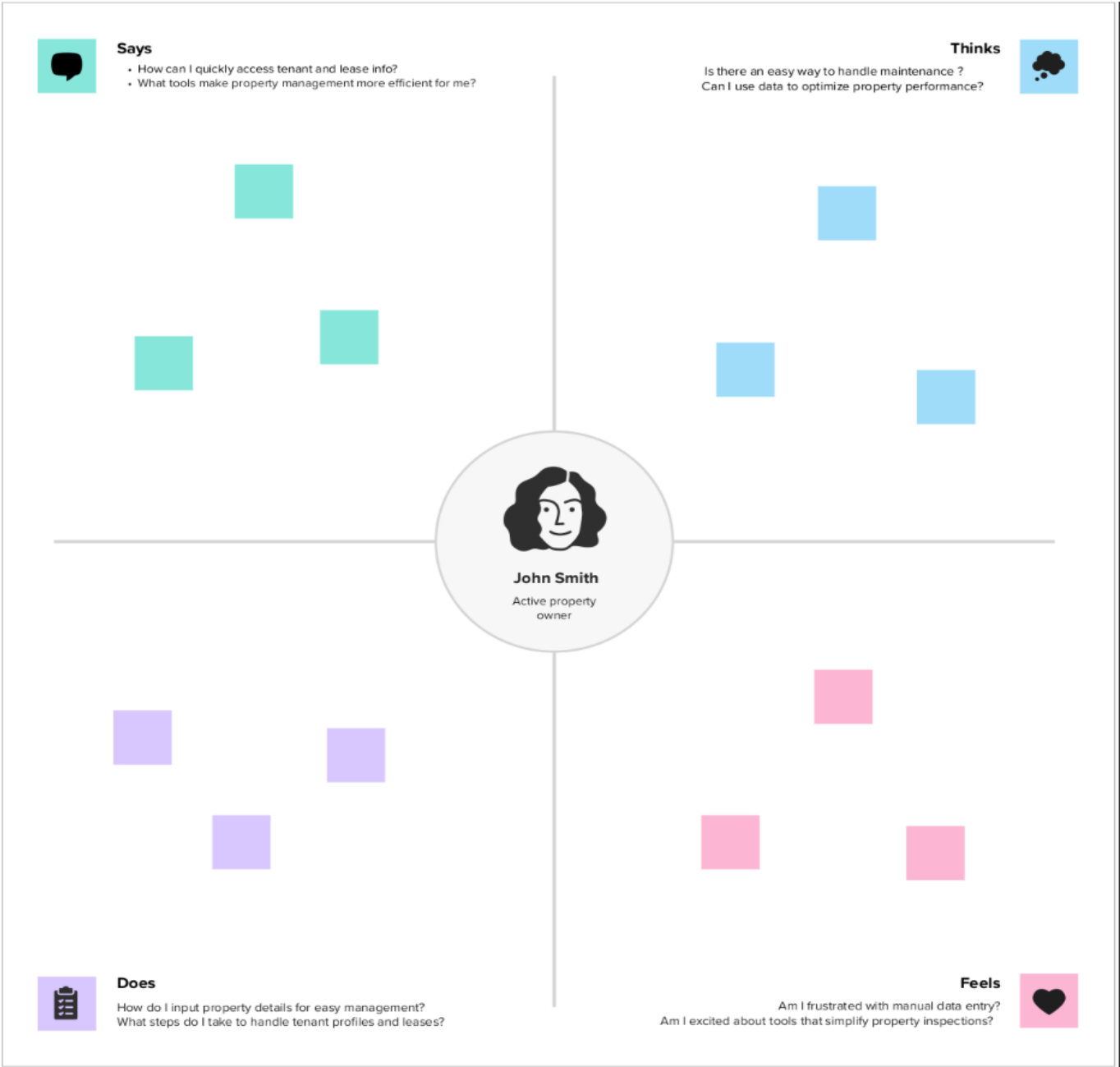
### **Technology Stack:**

The robustness of the system is underpinned by a well-rounded technology stack:

Salesforce (Apex, Visualforce): The core of the system is built on the Salesforce platform, utilizing Apex for custom logic and Visualforce for tailored user interfaces.

# Empathy Map:

During the design phase, the Empathy Map played a pivotal role in gaining a deep understanding of the challenges and pain points experienced by property managers. This valuable insight informed critical decisions regarding user interface design, workflow optimization, and feature prioritization, ultimately resulting in a system that resonates with its end-users.



## STEP 1: CREATE A SALESFORCE ACCOUNT

The screenshot shows the Salesforce user profile for Abin Sounderraj. The header includes a navigation bar with 'Choose Your Tour', a search bar, and a 'Buy Now' button. The profile card features a cartoon avatar, the name 'Abin Sounderraj', and a bio: 'Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)'. Below the profile card is a 'Details' section with fields for Name, Title, Email, Manager, Company Name, and Phone. The 'Related' section shows 'Groups (0)' and 'Files (0)'. The background of the profile card is a stylized illustration of a landscape with mountains and a hot air balloon.

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search...

Property Managem... Home Leads ▾ Properties ▾ Loans ▾ Reports ▾ Dashboards ▾ \* Abin Sounderraj ▾ X

**Abin Sounderraj** Edit User Detail

Share your awesomeness with the world.  
(Or at least with your colleagues on Chatter.)

Learn new skills on Trailhead, the fun way to learn Salesforce.

Connect with fellow Trailblazers on the Trailblazer Community.

**Details**

Name	Manager
Abin Sounderraj	
Title	Company Name
	gsct
Email	Phone
abinsounderrajdev@gmail.com	

**Related**

Groups (0)

Files (0)

## STEP 2: CREATE THE OBJECT ( PROPERTY & LOAN )

The screenshot shows the Salesforce Object Manager setup page. The header includes a navigation bar with 'Choose Your Tour', a search bar, and a 'Buy Now' button. The page title is 'Object Manager' with a subtitle '49 Items, sorted by Label'. Below the title is a table listing various objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed include Account, Account Contact Relationship, Activity, Asset, Asset Relationship, Activity, Campaign, Campaign Influence, and Campaign Member. The 'Activity' row is highlighted, showing it is a Custom Object with a last modified date of 19/10/2023 and a deployment status of '✓'.

Choose Your Tour ▾ Leave Feedback Days left in trial 27 Buy Now

Search Setup

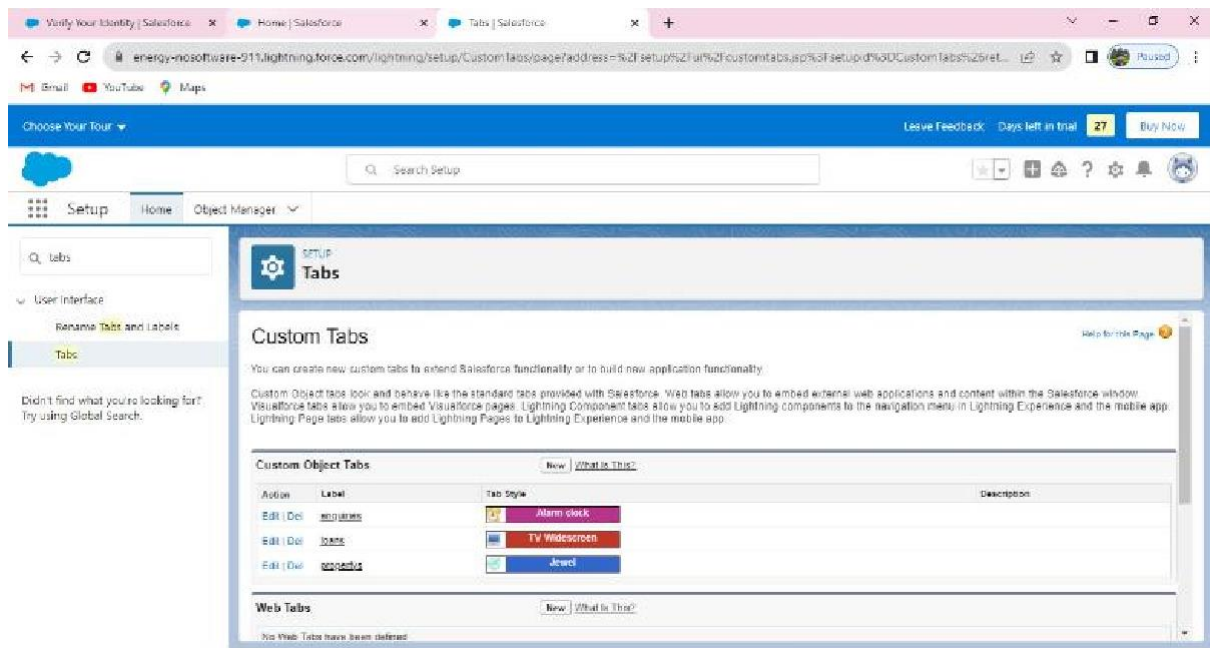
Setup Home Object Manager ▾

**Object Manager** 49 Items, sorted by Label

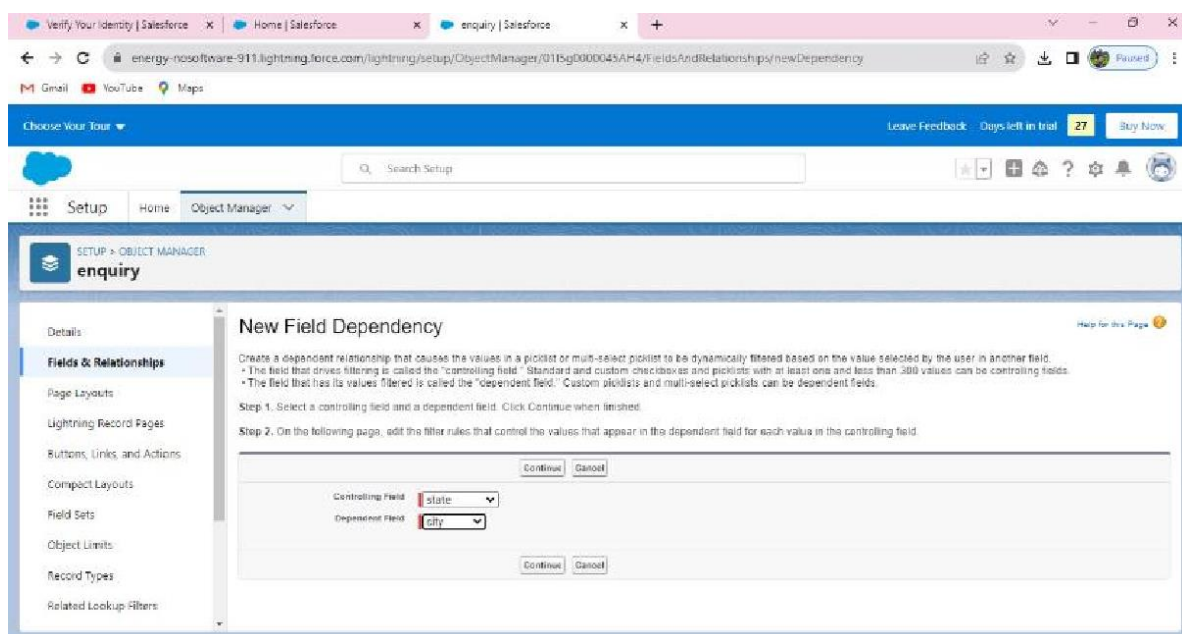
Quick Find Schema Builder Create ▾

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Account Contact Relationship	AccountContactRelation	Standard Object			
Activity	Activity	Standard Object			
Asset	Asset	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Activity	Activity_c	Custom Object		19/10/2023	✓
Campaign	Campaign	Standard Object			
Campaign Influence	CampaignInfluence	Standard Object			
Campaign Member	CampaignMember	Standard Object			

### STEP 3 CREATE THE LIGHTNING TAB TO CREATE A TAB : (ENQUIRE & TAB)



### STEP 4 CREATE PICKLIST FIELDS ON OBJECT (ENQUIRY , PROPERTY,& LOAN)



energy-us01ware-911.lightning.force.com/lightning/setup/ObjectManager/015g0000045A+9/FieldsAndRelationships/view

Choose Your Tour ▾ Leave Feedback Days left in trial **26** Buy Now

Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER  
**property**

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

**Fields & Relationships**  
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
enquiries	enquiries__c	Formula (Text)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
property Name	Name	Text(80)		✓

Choose Your Tour ▾ Leave Feedback Days left in trial **26** Buy Now

Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER  
**loan**

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

**Details**

Description

API Name  
loan\_\_c

Custom  
✓

Singular Label  
loan

Plural Label  
loans

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

### Step 5 create page layout for property object

Choose Your Tour ▾ Leave Feedback Days left in trial **26** Buy Now

Search Setup

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER  
**property**

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

**Page Layouts**  
3 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
buy	RAJA, S, 22/10/2023, 11:05 am	RAJA, S, 22/10/2023, 11:06 am
property Layout	RAJA, S, 22/10/2023, 9:10 am	RAJA, S, 22/10/2023, 10:40 am
rent	RAJA, S, 22/10/2023, 11:09 am	RAJA, S, 22/10/2023, 11:10 am

## STEP 6 : CREATE A RECORD TYPE FOR PROPERTY OBJECT

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Choose Your Tour', 'Leave Feedback', 'Days left in trial 26', and a 'Buy Now' button. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'property' and shows the 'Record Type' configuration for 'Buy'. The 'Record Type Label' is 'Buy', the 'Record Type Name' is 'Buy', and the 'Active' checkbox is checked. The 'Created By' is 'RAJA S.' and the 'Modified By' is 'RAJA S.'. The 'Description' field is empty. The 'Edit' button is visible.

Record Type: Buy

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Record Type Label: Buy

Record Type Name: Buy

Created By: RAJA S. 22/10/2022, 7:03 pm

Modified By: RAJA S. 22/10/2022, 7:08 pm

## PAGE LAYOUT ASSIGNMENT

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Choose Your Tour', 'Leave Feedback', 'Days left in trial 26', and a 'Buy Now' button. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'property' and shows the 'Page Layout Assignment' configuration. The table below shows the page layout assignments for different record type and profile combinations.

Page Layout Assignment

The table below shows the page layout assignments for different record type and profile combinations.

Profiles	Record Types	Master	Page
Analytics Cloud Integration User		DEV	DEV
Analytics Cloud Security User		DEV	DEV
Chatter External User		DEV	DEV
Chatter Free User		DEV	DEV
Chatter Moderator User		DEV	DEV
Contract Manager		DEV	DEV
CPQ Integration User		DEV	DEV
End User		DEV	DEV
Executive Sponsor		DEV	DEV
Identity User		DEV	DEV
Marketing executives profile		DEV	DEV



### STEP 6 : TO CREATE A NEW PROFILE ( SALES MANAGER ,MARKETING EXECUTIVE & SALES EXECUTIVE)

[illegible]

## STEP 7 : CREATE USER

The screenshot shows the Salesforce Setup interface. The top navigation bar includes "Choose Your Role", "Leave Feedback", "Days left in trial", and "Buy Now". Below this is a search bar labeled "Search Setup". On the left sidebar, the "Users" section is selected under the "Setup" menu. The main content area displays the "All Users" page, which includes instructions on how to manage users and a table listing existing users.

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
<a href="#">Edit</a>	Chatter Coach	Chatter	chatty06c5g800000h2eaj7evmuy72zdr@chatter.salesforce.com			<input type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	Gusla Sumo	sword	sumovsola@thesumadodge.com			<input checked="" type="checkbox"/>	Contract Manager
<a href="#">Edit</a>	Sasha	ES	rjalsuo2lms-dqbn@force.com	22/10/2023 6:50 pm		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	Suzanne Fox	susan	sxsagapnactd4nfurucvz49.mphvjyxbkx0.04huklvshbu@example.com			<input type="checkbox"/>	End User

## STEP 8 CREATE THE PERMISSION SET

The screenshot shows the Salesforce Setup interface. The top navigation bar includes "Choose Your Tour", "Leave Feedback", "Days left in trial 26", and "Buy Now". The left sidebar has a search bar "PERMISSION SET" and a list of items: "Users", "Permission Set Groups", and "Permission Sets". The main content area is titled "Permission Sets" and contains a table of existing permission sets.

Action	Permission Set Label	Description	License
<a href="#">Clone</a>	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<a href="#">Clone</a>	SeoS Indoxing Q2C User Perm	Allows the user to access entities indexed by SeoS Indoxin...	Cloud Integration User
<a href="#">Clone</a>	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<a href="#">Clone</a>	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Acco...	Your Account App
<a href="#">Del   Clone</a>	sales rep3		
<a href="#">Del   Clone</a>	sales rep4		
<a href="#">Del   Clone</a>	sales rep5		

## STEP 9 ( SETUP FOR OWD)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes "Choose Your Tour", "Leave Feedback", "Days left in trial 26", and "Buy Now". The left sidebar has a search bar "SHAR" and a list of items: "Security" and "Sharing Settings". The main content area is titled "Sharing Settings" and contains a table of organization-wide defaults.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account, Contract and Order	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read Only	Private	✓
Quote	Controlled by Parent	Controlled by Parent	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓

## STEP 10 USER ADOPTION (ENQUIRE) (CREATE,VIEW, DELETE)

### CREATE

Choose Your Tour

Leave Feedback Days left in trial 26 Buy Now

property managem...

enquiries

property

loans

Dashboards

\* RAJA, S

X

enquiry

SUNNY

New Contact Edit New Opportunity

Related

Details

\* - Required Information

\*enquiry NameSUNNYOwnerRAJA, S

enquiry number2

stateView all dependenciesrajasthan

cityView all dependencies--None--

Created ByRAJA, S, 22/10/2023, 7:42 pmLast Modified ByRAJA, S, 22/10/2023, 7:42 pm

CancelSave

### VIEW

Choose Your Tour

Leave Feedback Days left in trial 26 Buy Now

property managem...

enquiries

property

loans

Dashboards

\* RAJA, S

X

enquiry

SUNNY

New Contact Edit New Opportunity

Related

Details

enquiry NameSUNNY

enquiry number2

stateView all dependenciesrajasthan

cityView all dependencies--None--

Created ByRAJA, S, 22/10/2023, 7:42 pmLast Modified ByRAJA, S, 22/10/2023, 7:42 pm

### DELETE

Choose Your Tour

Leave Feedback Days left in trial 26 Buy Now

property managem...

enquiries

property

loans

Dashboards

\* RAJA, S

X

enquiry

SUNNY

New Contact Edit New Opportunity

Related

Details

Delete enquiry

Are you sure you want to delete this enquiry?

CancelDelete

\*enquiry NameSUNNY

enquiry number2

stateView all dependenciesrajasthan

cityView all dependencies--None--

Created ByRAJA, S, 22/10/2023, 7:42 pmLast Modified ByRAJA, S, 22/10/2023, 7:42 pm

CancelSave

## STEP 11: REPORT

### CREATE A REPORT

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with 'Choose Your Tour' and 'Leave Feedback'. Below it, a search bar and a menu with options like Sales, Home, Leads, Accounts, Contacts, Opportunities, Calendar, Forecasts, Dashboards, Reports, Quotes, enquiries, and More. The 'Reports' section is active, showing a 'Recent' list of 3 items. The list has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are 'Marketing Exec Leads by Source', 'Sales Person Activity', and 'Sales Exec Pipeline', all created by 'RAJA.S' on 18/10/2023 at 3:15 pm. A sidebar on the left shows 'REPORTS' and 'FOLDERS' sections. At the bottom, there's a 'To Do List' icon.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Marketing Exec Leads by Source		Sales and Marketing Reports	RAJA.S	18/10/2023, 3:15 pm	
Created by Me	Sales Person Activity		Sales and Marketing Reports	RAJA.S	18/10/2023, 3:15 pm	
Private Reports	Sales Exec Pipeline		Sales and Marketing Reports	RAJA.S	18/10/2023, 3:15 pm	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						

## STEP 12 CREATE DASHBOARD

The screenshot shows the Salesforce Dashboard interface. At the top, there's a navigation bar with 'Choose Your Tour' and 'Leave Feedback'. Below it, a search bar and a menu with options like property management, enquiries, properties, loans, and Dashboards. The 'Dashboards' section is active, showing a 'Sample Report: Users Logged In' and a 'Sample Report: # of Reports'. The 'Sample Report: Users Logged In' is a bar chart showing 1 user logged in. The 'Sample Report: # of Reports' is a donut chart showing 143 records. The dashboard is titled 'sunny' and has a '+ Component' button. The interface includes a sidebar with navigation options and a top bar with search and user information.

Sample Report: Users Logged In	Sample Report: # of Reports
1	143

## STEP13 FLOWS

### CLASSIC EMAIL TEMPLATE

The screenshot shows the Salesforce Classic Email Templates setup page. The top navigation bar includes "Choose Your Tour", "Leave Feedback", "Days left in trial 26", and a "Buy Now" button. The left sidebar contains a search bar and a list of navigation items: "Setup", "Home", "Object Manager", "Email", "Classic Email Templates", "Classic Letterheads", "Data Classification", "Data Classification Download", "Data Classification Settings", and "Data Classification Upload". The main content area is titled "Classic Email Templates" and displays details for a template named "loan amount pay remainder". The details include the email template name, unique name, encoding, author, description, created by, and modified by. There are buttons for "Edit", "Delete", and "Clone". A "Send Test and Verify Merge Fields" button is also present.

Choose Your Tour ▾ Leave Feedback Days left in trial 26 Buy Now

Search Setup

Setup Home Object Manager ▾

class

Email

- Classic Email Templates
- Classic Letterheads
- Data Classification
  - Data Classification Download
  - Data Classification Settings
  - Data Classification Upload

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

SETUP Classic Email Templates

Test Email Template: loan amount pay remainder

Preview your email template below.

Email Template Detail

Email Templates from Salesforce	Untitled Public Classic Email Templates	Available For Use	<input type="checkbox"/>
Email Template Name	loan amount pay remainder	Last Used Date	
Template Unique Name	loan_amount_pay_remainder	Times Used	
Encoding	Unicode (UTF-8)		
Author	RAJA_S (Chango)		
Description			
Created By	RAJA_S 22/10/2023 4:46 pm	Modified By	RAJA_S 22/10/2023 4:46 pm

Edit Delete Clone

Email Template

Send Test and Verify Merge Fields

Subject: loan amount pay remainder

## FLOWS

The screenshot shows the Salesforce Flow Builder interface. The top navigation bar includes a back arrow, a forward arrow, a refresh icon, and a URL: "energy-nosoftware-9111.lightning.force.com/builder\_platform\_interaction/flowbuilder.app?flowId=3015g000002mGSJAAM". The left sidebar contains a "How builder" button and a "due date for loan payment - v2" button. The main content area displays a flow diagram with a "Record-Triggered Flow" start node, a "Run Immediately" action node, and an "End" node. The flow is titled "due date for loan payment - v2".

energy-nosoftware-9111.lightning.force.com/builder\_platform\_interaction/flowbuilder.app?flowId=3015g000002mGSJAAM

How builder due date for loan payment - v2

Select Elements

Auto-Layout ▾ Version 2: Inactive—Last modified 3 hours ago Run Debug View Tests Activate Save As Save

Record-Triggered Flow Start

Run Immediately

End

Home | Salesforce | sunny | Salesforce | Flows | Salesforce | due date for loan payment - V1

energy-nosoftware-911.lightning.force.com/builder\_platform\_interaction/floBuilder.app?flowId=3015g000002mGSYAA2

Gmail YouTube Maps

Flow Builder | due date for loan payment - V1

Select Elements | Auto-Layout | Version 1: Inactive—Last modified in a few seconds | Run | Debug | View Tests | Activate | Save As | Save

Record-Triggered Flow Start

Run Immediately

End

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object

loan

Configure Trigger

\* Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements:

None

## CREATE THE RECORD TO TEST THE FLOW

Choose your tour | Leave Feedback | Days left in trial: 26 | Buy Now

Search...

property managem... | enquiries | property | loans | Dashboards

loans

Recently Viewed

1 item • Sorted by loan id • Updated 2 minutes ago

Search this list...

New | Import | Change Owner

	loan id ↑
1	LN-0005

## Conclusion:

The Property Management App is an innovative solution that simplifies the property buying process for users, while providing essential features for the marketing and sales teams to enhance their efficiency. It offers a user-friendly interface, security controls, and insightful reports to facilitate a seamless property management experience.

## Future Enhancements:

Potential future enhancements could include:

Integration with real-time property databases and multiple listing services (MLS) for up-to-date property information. Enhanced AI-driven recommendation systems for matching buyers with properties. Expanding the loan calculator to consider various loan types and lenders. Integration with third-party payment gateways for property bookings and transactions. This project aims to revolutionize property management and bring significant benefits to both buyers and property management teams.