

**PROPERTY MANAGEMENT APPILICATION**

**USING SALESFORCE**

## **Trailhead Profile Public URL**

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- **Team Member2- S.Manikandan**  
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# PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

## 1 INTRODUCTION

### 1.1 Overview

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 dashboards so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal.

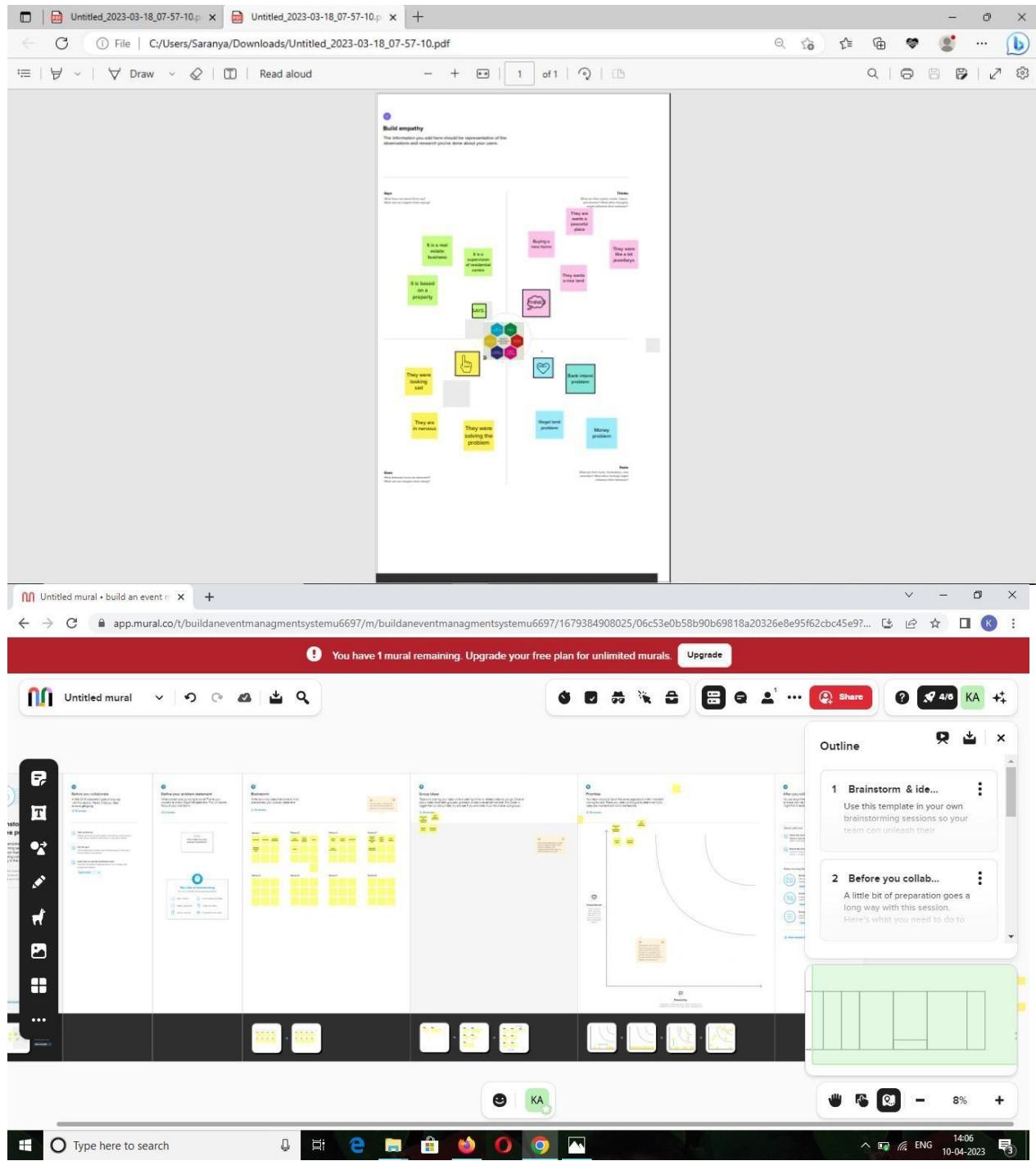
### 1.2 Purpose

- Salesforce property management enables the realty managers to keep track of crucial data about financial and household properties incorporating associated cash flow, primary tenants, and occupancy rates.
- Property managers assist owners in creating budgets, advertise rental properties, qualify tenants, and collect rent.
- Property Management helps marketing, sales, commerce, service and IT team work as one from anywhere.
- Track emails, calls, and set tasks to connect with the right buyers, sellers, and renters at the right time.

## 2. Problem Definition & Design Thinking

### 2.1 Empathy Map

### 2.2 Ideation & Brainstorming



### 3. RESULT

## a. Data Model

Object name	Fields in the Object	
Buy	Field label	Data type
	Property type	Picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
	Annual amount to be paid	Picklist
Rent	Field label	Data type
	Rent	Auto number
	Rental City	Text
	BHK type	Picklist
Loan	Field label	Data type
	Loan Id	Auto number
	Interest rate	Currency
	Term	Number
	Annual Loan	Number

		Total loan Instalments	Number													
		LoanRepayment	Currency													
		Loan amount	Formula													
	Student															
	<table border="1"> <thead> <tr> <th>Field label</th><th>Data type</th></tr> </thead> <tbody> <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> </tbody> </table>				Field label	Data type	Lead	Auto Number	State	Picklist	City	Picklist	Email	Email	Phone	Phone
Field label	Data type															
Lead	Auto Number															
State	Picklist															
City	Picklist															
Email	Email															
Phone	Phone															

### a. Activity and Screenshot

Salesforce:

Creating Developer Account Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developer.salesforce.com/)
2. Click on sign up.
3. On the sign up form, enter the following details :
  - a. First name & Last name
  - b. Email
  - c. Role : Developer
  - d. Company : College Name
  - e. County : India
  - f. Postal Code : pin code
  - g. Username : should be a combination of your name and company This need not be an actual email id, you can give anything in the format : username@organization.com Click on sign up after filling these.

salesforce developer login - Google

google.com/search?q=salesforce+developer+login&oq=sales&aqs=chrome.0.69i59i2j69i57j69i59j46i131i199i433i465i512j69i60l3.7184j04&sourceid=chrome&ie=UTF-8

Google

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All Shopping Images Videos Books More Tools SafeSearch

About 8,40,00,000 results (0.28 seconds)

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Login | Salesforce

Salesforce Customer Secure Login Page. Login to your Salesforce Customer Account.

Sales Force https://developer.salesforce.com ...

Salesforce Developers: Developer Portal

Login into access a rich community of Salesforce Developers, get ideas, and find solutions. Developer Forums.

You've visited this page many times. Last visit: 28/3/23

Sales Force https://developer.salesforce.com / signup ...

**Developer Edition Signup**

Sign up for your Salesforce Developer Edition ... Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

Sales Force https://developer.salesforce.com / auth / login ...

Type here to search Address 20:16 10-04-2023

Developer Portal | Salesforce Dev ... Salesforce Developer Community

developer.salesforce.com/forums#l/feedtype=RECENT&criteria=ALLQUESTIONS&

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- General Development (54741)
- Visualforce Development (37153)
- Lightning (17624)
- APIs and Integration (16787)
- Trailhead (11585)
- Formulas & Validation Rules
- Discussion (11181)
- Other Salesforce Applications (8014)
- Jobs Board (6637)
- Force.com Sites & Site.com (4801)
- Mobile (2669)

View More Topics

What would you like to know?

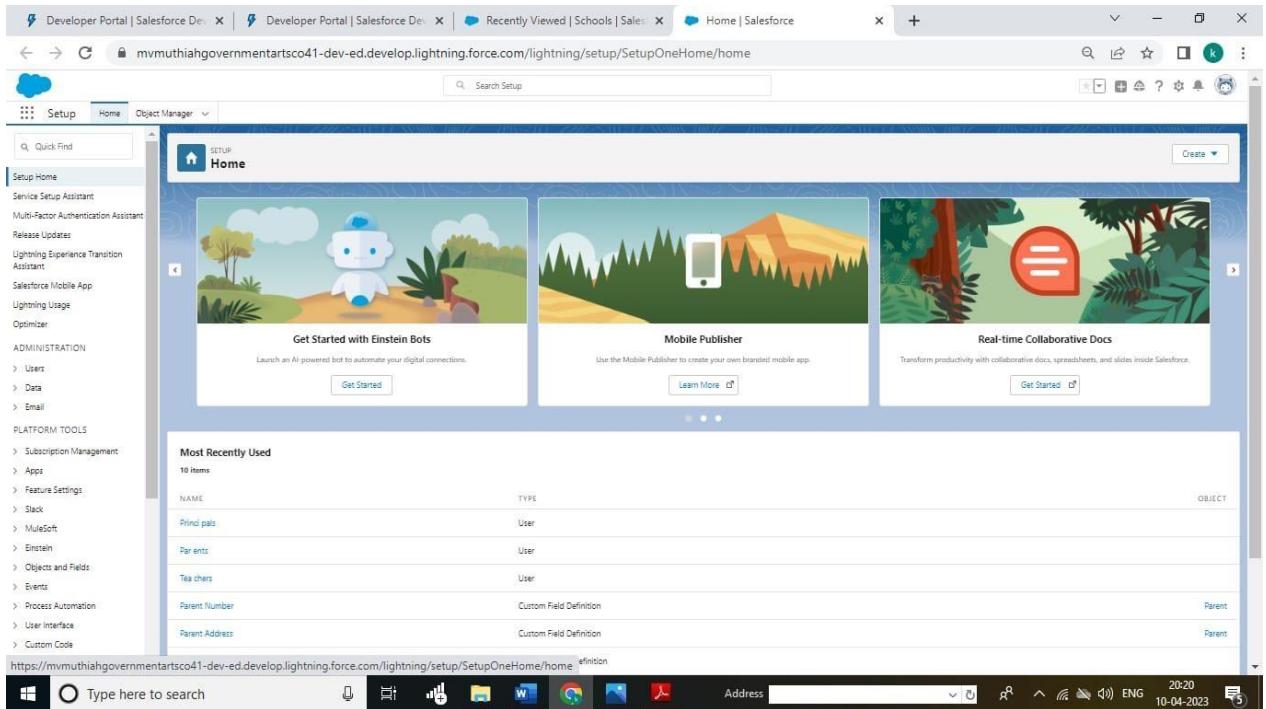
Show All Questions sorted by Date Posted

Loading...

Waiting for privacyportal.onetrust.com...

Address 20:17 10-04-2023

FEEDBACK



## Mile Stone 2: Objects

To Navigate to Setup page:

1. Click on gear icon → click setup.

To create an object:

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

On Custom object defining page:

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

Create Object Buy

1. To create an object:

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

3. Enter the label name→Buy

4. plural label name→ Buyers

5. click on Allow reports,

6. Allow search → Save

Create Object Rent

1. To create an object:

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

3. Enter the label name →Rent

4. Plural label name→ Rents

5. Click on Allow reports,

6. Allow Search -> Save

Create Object Loan

7. To create an object:

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

9. Enter the label name →Loan

10. Plural label name→ Loans

11. Click on Allow reports,

12. Allow search → Save

Screenshot of the Salesforce Lightning Experience interface showing the "Edit Custom Object: Buy ~ Sales" page.

The URL is <https://mvmuthiahgovartscollegefo-dev-ed.develop.my.salesforce.com/01l2w000003bHck/e?appLayout=setup&noS1Redirect=true>

**Custom Object Definition Edit**

**Custom Object Information**

- Label: Buy (Example: Account)
- Plural Label: Buyers (Example: Accounts)
- Starts with vowel sound:

The Object Name is used when referencing the object via the API.

- Object Name: Buy (Example: Account)
- Description: Money

Context-Sensitive Help Setting:
  Open the standard Salesforce.com Help & Training window
  Open a window using a Visualforce page

Content Name: -None-

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

**New Custom Object Tab**

**Step 1. Enter the Details** (Step 1 of 3)

Select an existing custom object or [create a new custom object now](#).

- Object: Buy
- Tab style: Car

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: -None-

Enter a short description:

Next Cancel

Home | Salesforce

mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...

Apps Gmail YouTube Maps

Cloud Setup Home Object Manager

Quick Find

SETUP Tabs

New Custom Object Tab

Step 2, Add to Profiles

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Profile

Analytics Cloud Integration User Analytics Cloud Security User Authenticated Website Authenticated Website Contract Manager Cross Org Data Proxy User Custom Marketing Profile Custom Sales Profile Custom Support Profile Customer Community Login User Customer Community Plus Login User Customer Community Plus User Customer Community User

Tab Visibility

(Default On) (Default On)

Help for this Page

Step 2 of 3

Type here to search

18:03 10-04-2023

The screenshot shows the Salesforce Setup interface with the 'Tabs' configuration page open. The URL in the browser is <https://mmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL...>. The page title is 'Tabs'. The left sidebar shows various setup categories like 'Setup Home', 'Service Setup Assistant', and 'Object Manager'. The main content area is titled 'Step 3. Add to Custom Apps' and 'Step 3 of 3'. It lists several standard tabs with checkboxes for 'include Tab'. The tabs listed are:

- Custom App
- Platform (standard\_Platform)
- Sales (standard\_\_Sales)
- Service (standard\_\_Service)
- Marketing (standard\_\_Marketing)
- Sample Console (standard\_\_ServiceConsole)
- High Volume Customer Portal User
- Authenticated Website User
- App Launcher (standard\_\_AppLauncher)
- Community (standard\_\_Community)
- Sites (standard\_\_sites)
- Salesforce Chatter (standard\_\_Chatter)
- Content (standard\_\_Content)
- Analytics Studio (standard\_\_Insights)
- Sales Console (standard\_\_LightningSalesConsole)
- Service Console (standard\_\_LightningService)
- Sales (standard\_\_LightningSales)

The screenshot also shows the Windows taskbar at the bottom with the date and time as 10-04-2023 17:52.

The screenshot shows the Salesforce Object Manager interface with the 'Buy' object details page open. The URL in the browser is <https://mmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003kaX9/Details/view>. The page title is 'Buy'. The left sidebar shows 'SETUP > OBJECT MANAGER' and the 'Buy' object. The main content area is titled 'Details'. The 'Fields & Relationships' section includes:

- API Name: Buy\_\_c
- Custom: ✓
- Singular Label: Buy
- Plural Label: Buys

The 'Details' section includes:

- Description: (empty)
- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

The screenshot also shows the Windows taskbar at the bottom with the date and time as 10-04-2023 17:52.

Salesforce Home | Rent | Salesforce Edit Custom Object: Rent ~ Sales +

mvmuthiahgovartscollegefo-dev-ed.develop.my.salesforce.com/01l2w000003bJb8/e?appLayout=setup&noS1Redirect=true

salesforce 23 Search... Search Switch to Lightning Experience Saranya S Setup Help Content

Home Chatter Libraries Content Subscriptions Buyers Rents Loans Students Marketins Sales Dashboards Lead with loan amounts +

Quick Find / Search... Search Expand All | Collapse All

Lightning Experience Transition Assistant Move to the new, more productive Salesforce. Get Started

Salesforce Mobile Quick Start

Home Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management

Edit Custom Object Rent

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label  Example: Account  
Plural Label  Example: Accounts  
Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

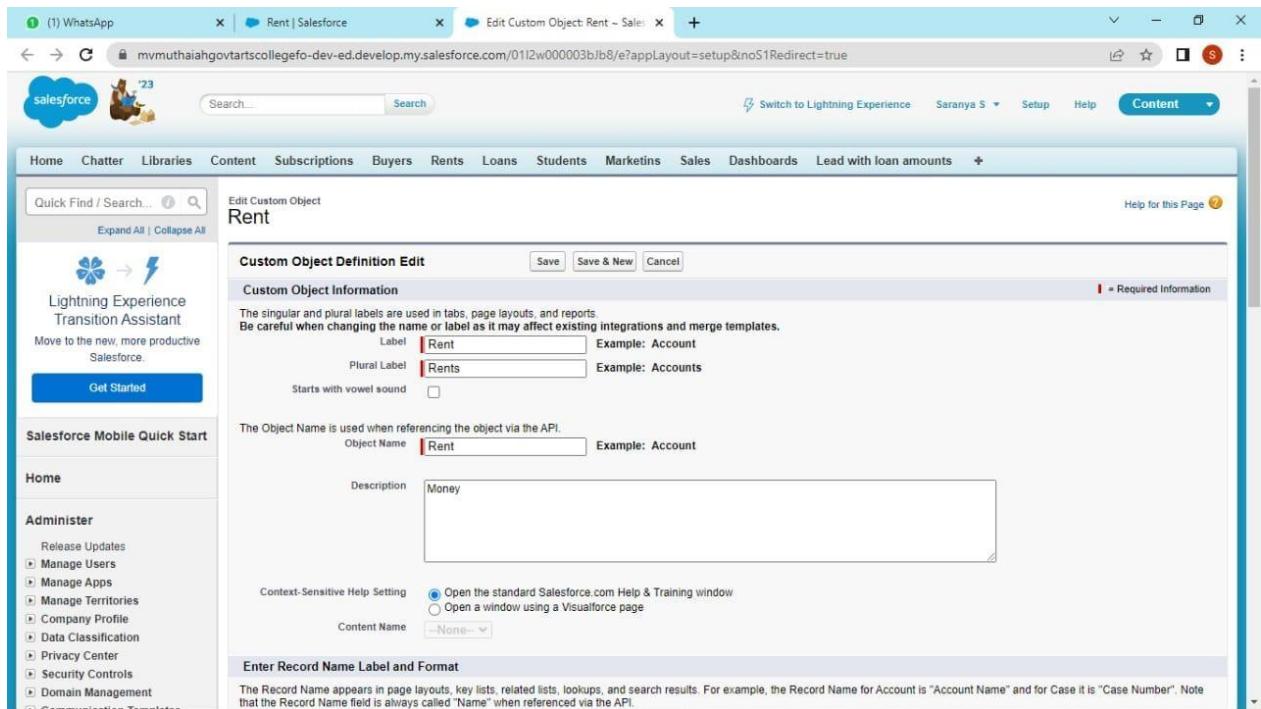
Description

Context-Sensitive Help Setting  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.



Home | Salesforce +

mymuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL... Search Star 🌐 Reading list

Cloud Setup Home Object Manager

Quick Find Search Setup

SETUP Tabs

New Custom Object Tab Step 1 of 3

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object  Tab Style

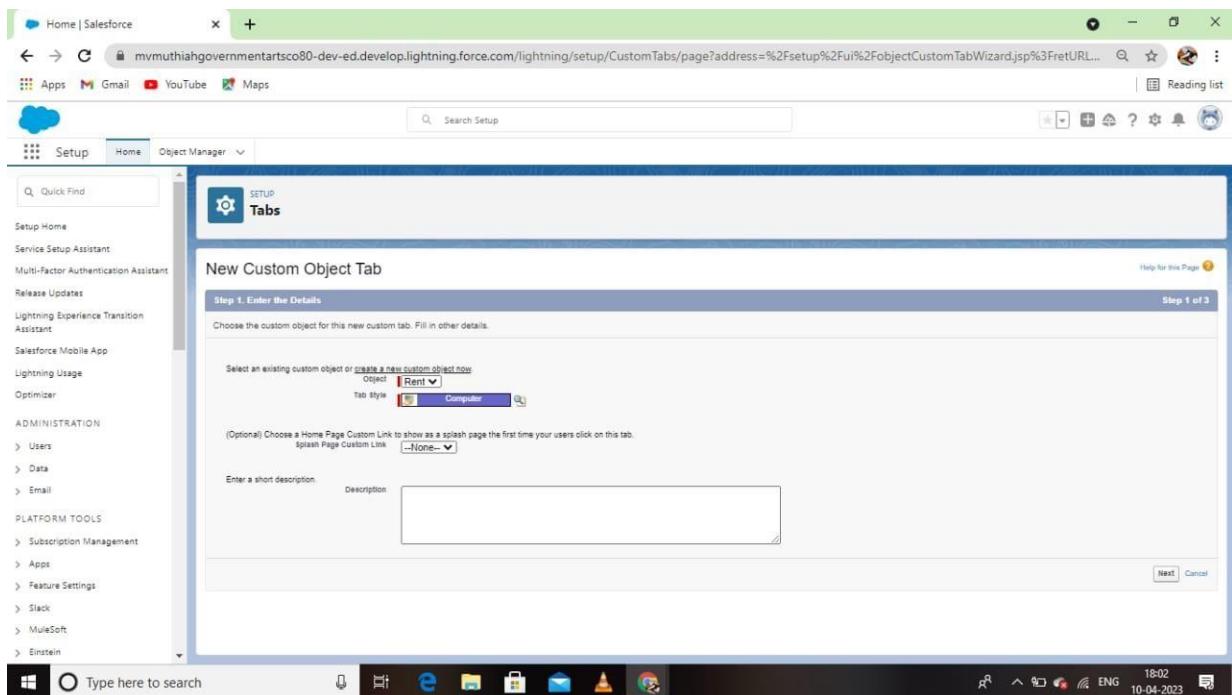
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

splash Page Custom Link

Enter a short description.

Description

Next Cancel



Home | Salesforce

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Setup Home Object Manager

Quick Find Search Setup

SETUP Tabs

### New Custom Object Tab

Step 2. Add to Profiles Step 2 of 3

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Apply one tab visibility to all profiles (Default On)  Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	(Default On)
Analytics Cloud Security User	(Default On)
Authenticated Website	(Default On)
Authenticated Website	(Default On)
Contract Manager	(Default On)
Cross Org Data Proxy User	(Default On)
Custom: Marketing Profile	(Default On)
Custom: Sales Profile	(Default On)
Custom: Support Profile	(Default On)
Customer Community Login User	(Default On)
Customer Community Plus Login User	(Default On)
Customer Community Plus User	(Default On)
Customer Community User	(Default On)

Type here to search

18:03 10-04-2023 ENG

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SETUP Tabs

### Step 3. Add to Custom Apps Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>

Type here to search

17:57 10-04-2023 ENG

Rent | Salesforce

mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw000003kaYW/Details/view

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Search Setup

Setup Home Object Manager

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

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Description

API Name: Rent\_\_c

Custom: ✓

Singular Label: Rent

Plural Label: Rents

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard Salesforce.com Help Window

Edit Delete

https://mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw000003kaYW/Details/view

Object Manager | Salesforce

mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01I%2Fe%3FretURL%3D%2Fsetup%2Fobject%2Fm...

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Search Setup

Setup Home Object Manager

SETUP

Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Student Example: Account

Plural Label: Students Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Student Example: Account

Description:

Context-Sensitive Help Setting:

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

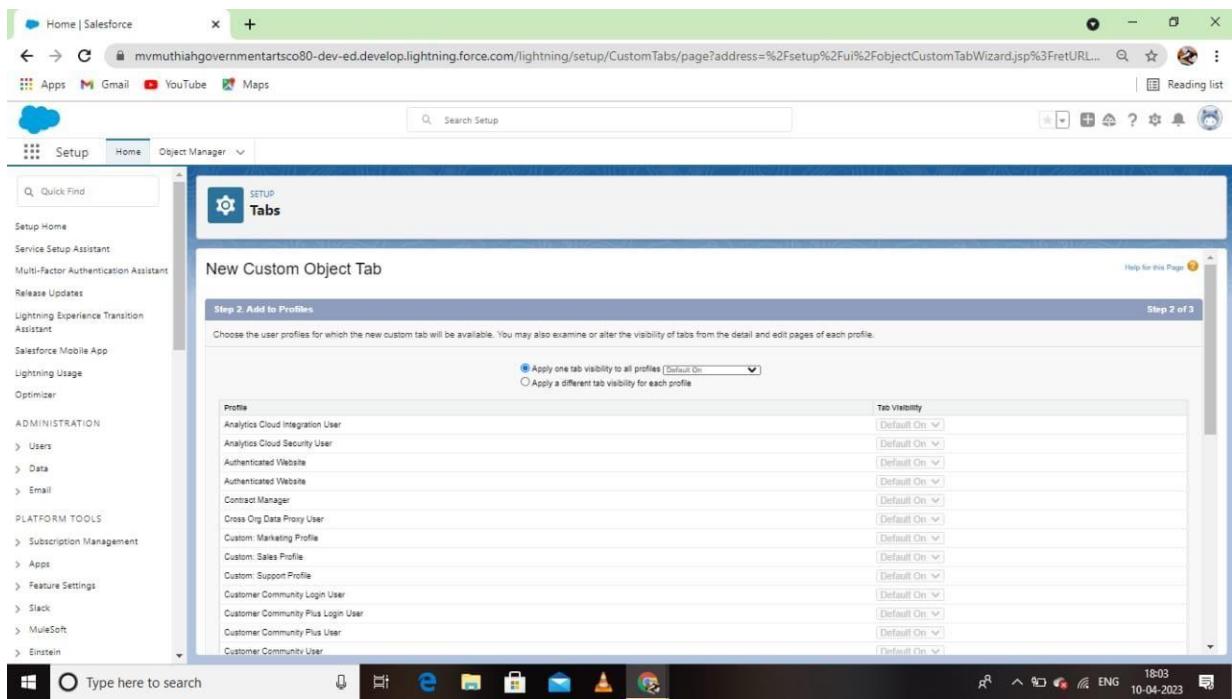
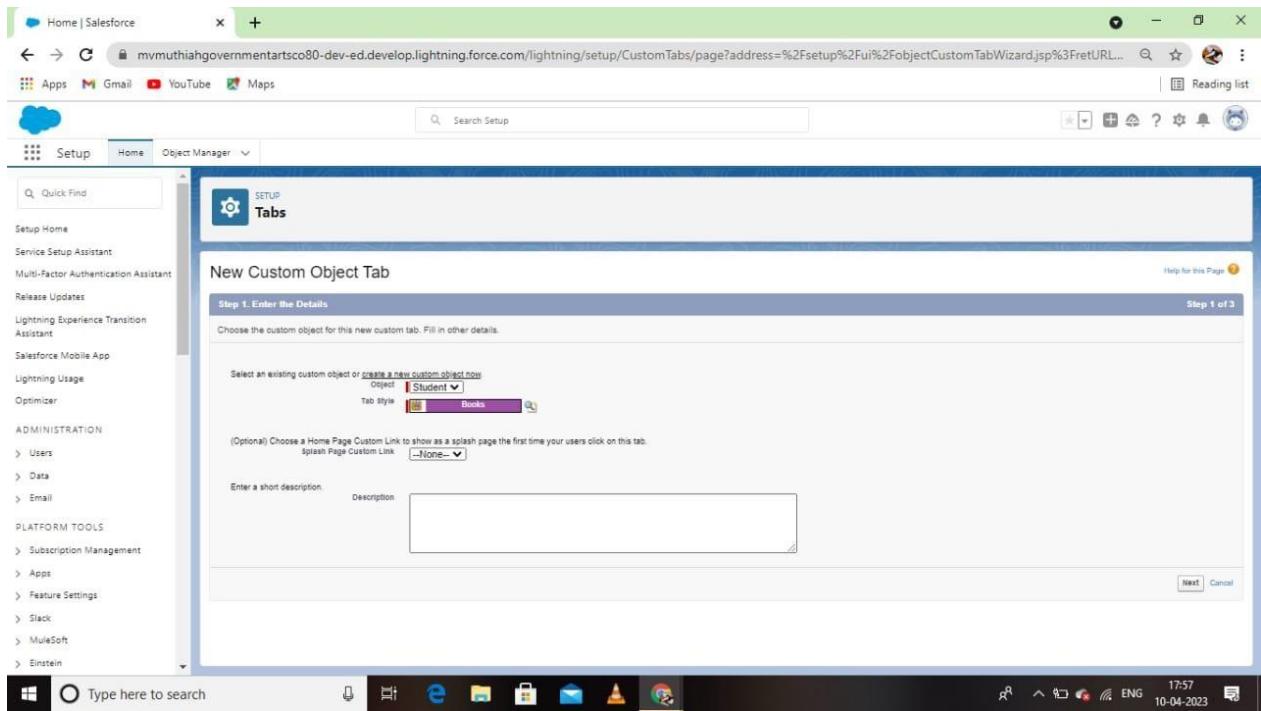
Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Student Name Example: Account Name

17:56 10-04-2023



Home | Salesforce

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Setup Home Object Manager

Quick Find Search Setup

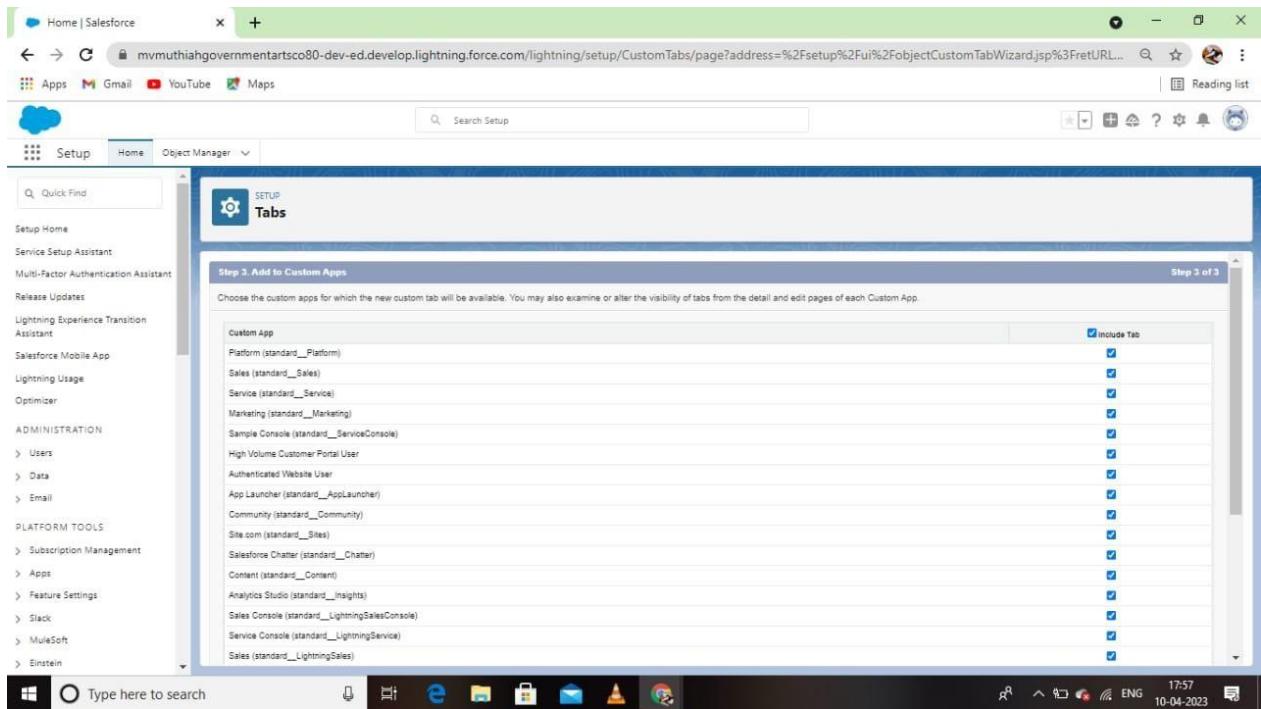
Setup Tabs

Step 3 of 3 Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	include Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>

17:57 ENG 10-04-2023



Student | Salesforce

mvmuthiahgovernmentartsco80-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003kaXx/Details/view

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Setup Home Object Manager

Quick Find Search Setup

SETUP > OBJECT MANAGER Student

Details

Description

API Name: Student\_\_c

Custom:

Singular Label: Student

Plural Label: Students

Enable Reports: ✓

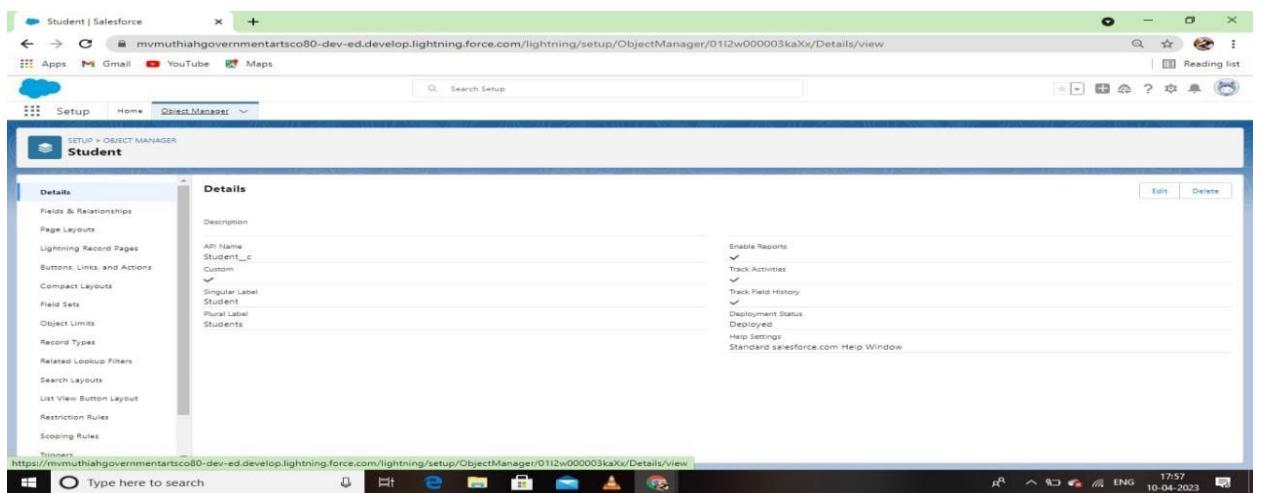
Track Activities: ✓

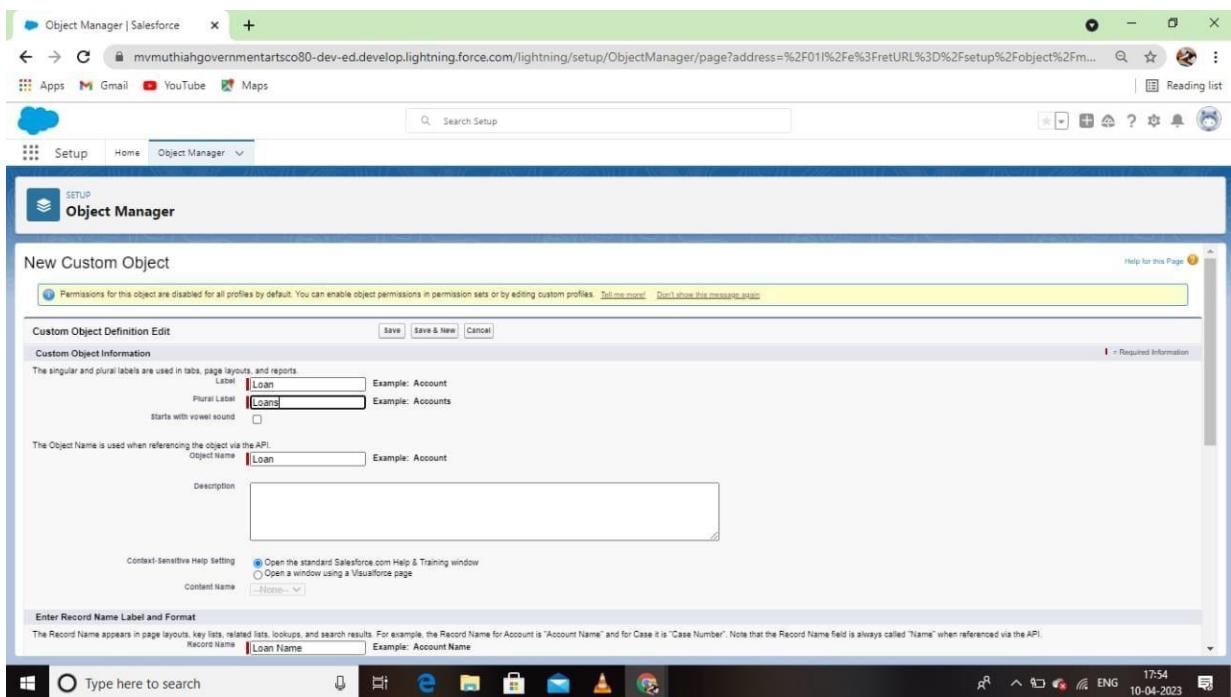
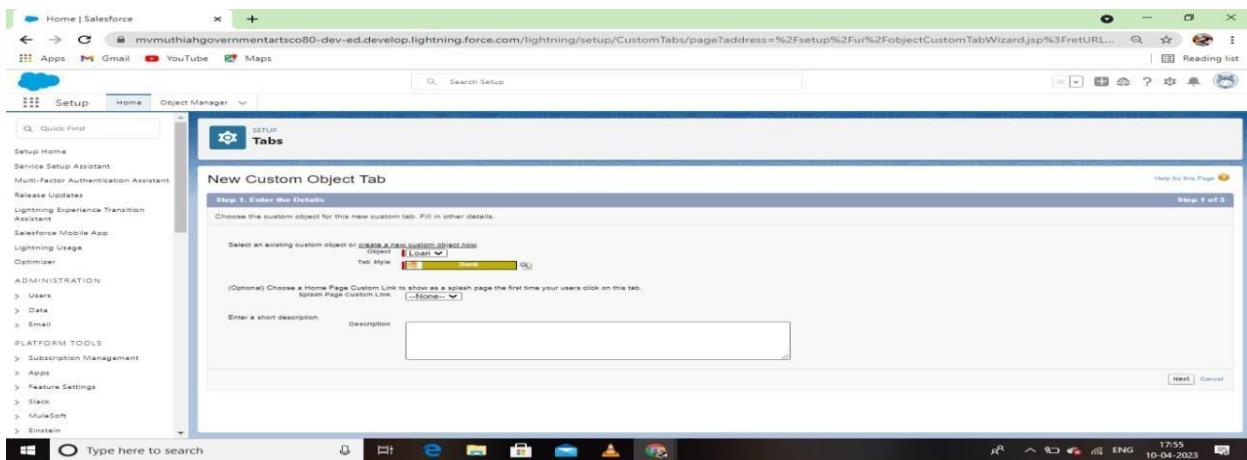
Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

17:57 ENG 10-04-2023





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Setup Home Object Manager

Quick Find Search Setup

Setup Tabs

New Custom Object Tab Step 2 of 3

Step 2. Add to Profiles

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Profile Tab Visibility

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On

Apply one tab visibility to all profiles (Default On)  Apply a different tab visibility for each profile

17:55 ENG 10-04-2023

This screenshot shows the 'New Custom Object Tab' configuration page in the Salesforce Setup. The main area is titled 'Step 2. Add to Profiles'. It lists various user profiles on the left and their corresponding 'Tab Visibility' settings on the right. Most profiles have 'Default On' selected. A radio button at the bottom allows for different visibility settings per profile. The sidebar on the left contains links for Setup Home, Service Setup Assistant, Release Updates, and other administrative tools. The bottom status bar shows the time as 17:55 and the date as 10-04-2023.

Home | Salesforce

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Setup Home Object Manager

Quick Find Search Setup

Setup Tabs

New Custom Object Tab Step 3 of 3

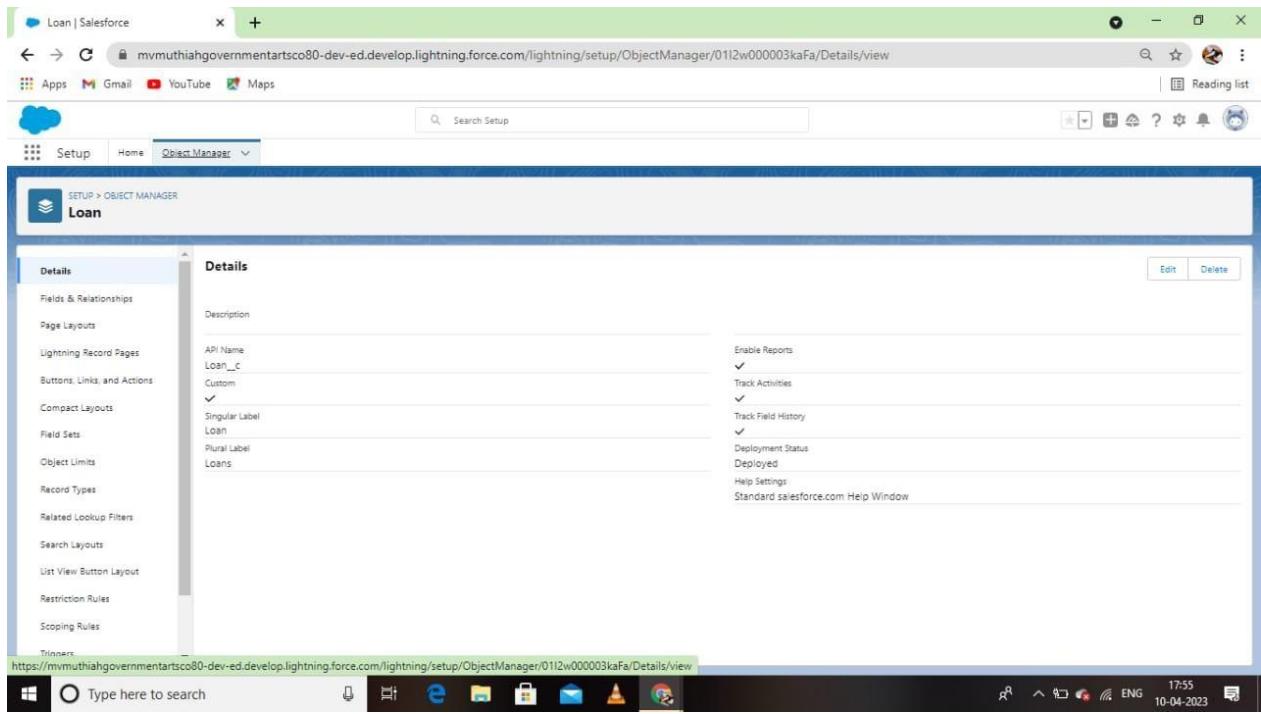
Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>

17:55 ENG 10-04-2023

This screenshot shows the 'New Custom Object Tab' configuration page in the Salesforce Setup. The main area is titled 'Step 3. Add to Custom Apps'. It lists various custom apps on the left and a 'include Tab' checkbox on the right. Most checkboxes are checked. The sidebar on the left contains links for Setup Home, Service Setup Assistant, Release Updates, and other administrative tools. The bottom status bar shows the time as 17:55 and the date as 10-04-2023.



## Mile Stone 3:Tab

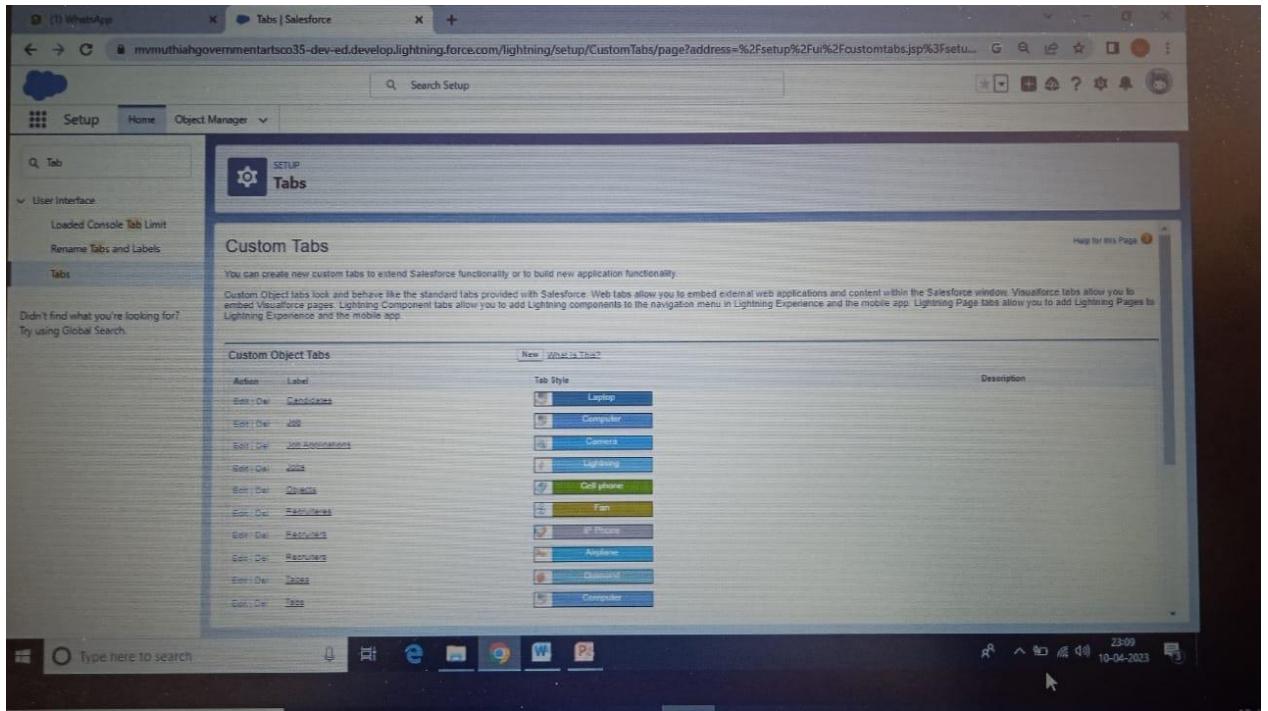
Create the Lightning

Tab To create a Tab: (Lead)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. 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
3. 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→ Save
4. To create a Tab :(Rent)
  1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
  2. Select Object (Rent) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save

To create a Tab :(Loan)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object (Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save



## Mile Stone:4 Lightining App

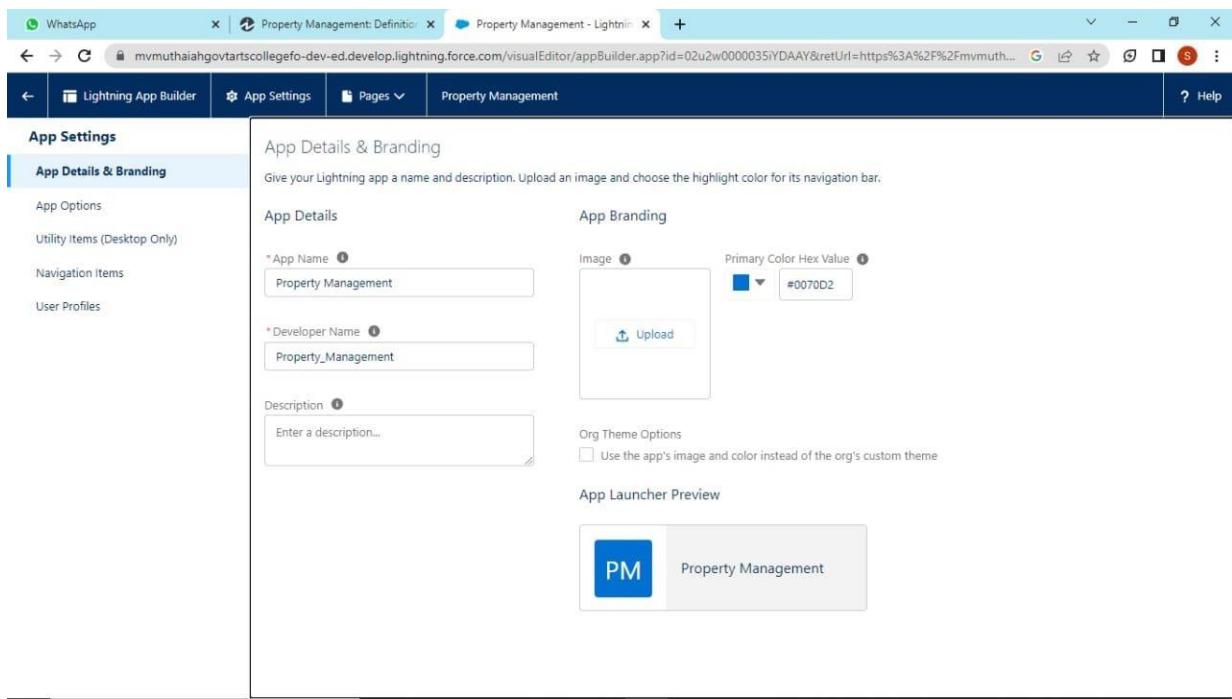
### Create the Lightning App

1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.
2. Fill the app name as an Property Management in app details and branding →Next → (App option page) keep it as default → Next
3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform user, Standard User → Next
4. To Add Navigation Items:

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

5. To Add User Profiles:

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



Developer Portal | Salesforce Dev | Developer Portal | Salesforce Dev | App Manager | Salesforce

← → ⌘ ↻ 🔒 mvmuthiahartscollegeforwome-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

## New Lightning App

### Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items  Selected Items

Type to filter list... Accounts

Back Next

Manage Connected Apps

App Name ↑	Developer Name ↓	Description ↓	Last Modified ... ↓	Ap... ↓	Vi... ↓
All Tabs	AllTabSet		01/03/2023, 12:35 ...	Classic	

Type here to search

07:30 ENG 10-04-2023

This screenshot shows the 'Navigation Items' configuration screen. It displays a list of available items (e.g., Accounts) and a selected items list. A progress bar at the bottom shows the configuration is 50% complete. The interface includes a sidebar with navigation links like 'Salesforce', 'Data', and 'App'. Below the main content is a table showing the current app settings, including the developer name 'AllTabSet' and last modified date '01/03/2023, 12:35 ...'. The taskbar at the bottom shows system status and the date '10-04-2023'.

Developer Portal | Salesforce Dev | Developer Portal | Salesforce Dev | App Manager | Salesforce

← → ⌘ ↻ 🔒 mvmuthiahartscollegeforwome-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

## New Lightning App

### User Profiles

Choose the user profiles that can access this app.

Available Profiles Selected Profiles

Standard User

Standard User

Standard User

Back Save & Finish

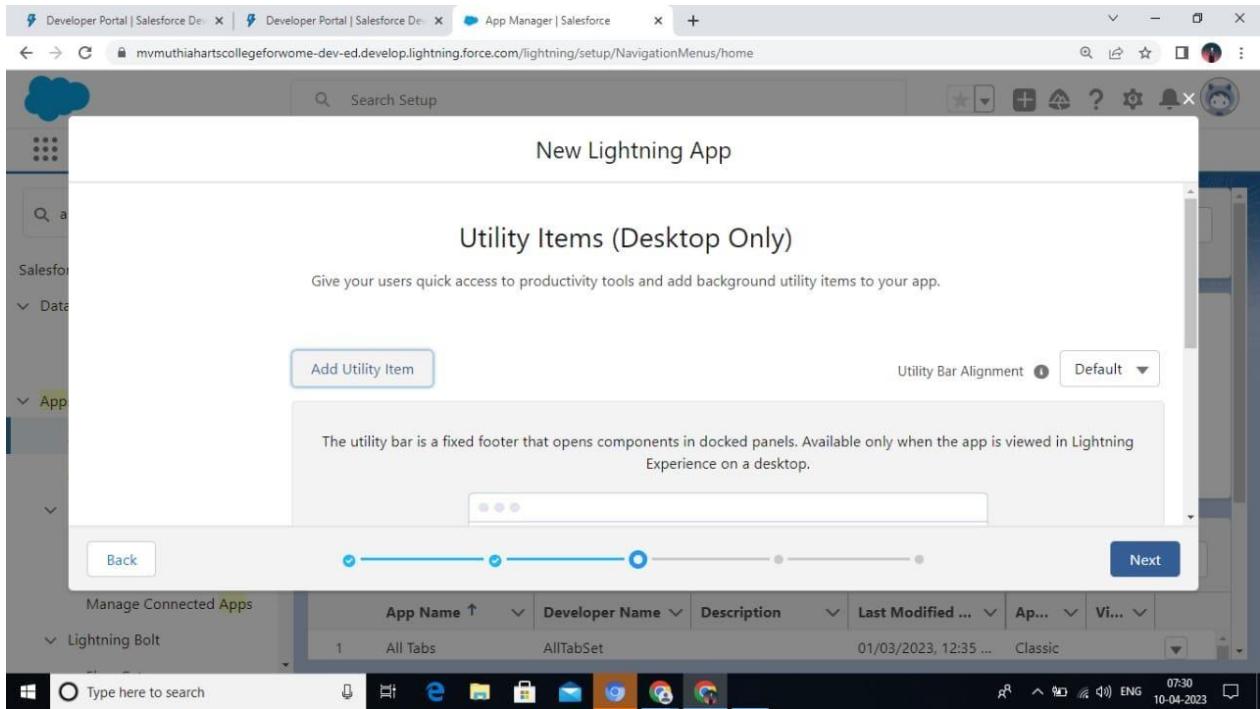
Manage Connected Apps

App Name ↑	Developer Name ↓	Description ↓	Last Modified ... ↓	Ap... ↓	Vi... ↓
All Tabs	AllTabSet		01/03/2023, 12:35 ...	Classic	

Type here to search

07:31 ENG 10-04-2023

This screenshot shows the 'User Profiles' configuration screen. It displays a list of available profiles (e.g., Standard User) and a selected profiles list. A progress bar at the bottom shows the configuration is 50% complete. The interface includes a sidebar with navigation links like 'Salesforce', 'Data', and 'App'. Below the main content is a table showing the current app settings, including the developer name 'AllTabSet' and last modified date '01/03/2023, 12:35 ...'. The taskbar at the bottom shows system status and the date '10-04-2023'.



## Mile Stone 5: Fields

### Create the Lead Field

1. Go to setup → click on Object Manager → type object name in search bar → click on the object.
2. Now click on “Fields & Relationships ” → New.
3. Fill the field label name Lead → Next → Next → Save.

Create the remaining Fields:

Follow the Above Steps to create the Field just change the Labels for Below Fields  
**Lead:**(AutoNumber Created Field while creating Object) → L-{0000}  
**State:** Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)  
**City:** Create the Picklist (Mumbai, Pune, Nashik)(Field Dependency)

**Email:** Create the Email Select the Data Type as Email (Email)

**Phone:** Select the Field Data type as (Phone)

**Activity2:**

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
- Activity3:

Create Field for Rent

1. Rent: (Auto Number while Creating the object) → R-{0000}
2. Rental City: Select the Text as the Field Data Name (Any City)
3. BHK type: (Picklist) (1BHK, 2BHK, 3BHK)

Activity4:

Create Field for Loan

1. Loan Id: Auto generated Field Take it as Autonumber LN-{0000}
2. Interest Rate: (Select the Field Data Type As Currency)
3. Term: (Select the Field Data type as Number)
4. Annual Loan Field create the Number as the field data type
5. Total Loan Instalments : ( Field create the Number as the field data type)
6. Loan Repayment ( Field create the Number as the field data type)
7. Loan Amount (Select the field data type as Formula)  
8. For the Loan Object → Go to the fields and Relationship and select the formula in field \_\_\_\_\_ data type. In Formula option select Advanced Formula and write the following formula  
$$\text{Loan\_Repayment\_c} * (((1+(\text{Interest\_rate\_c}/52))^{\text{Term\_c}} - 1)) / ((\text{Interest\_rate\_c}/52) * ((1+(\text{Interest\_rate\_c}/52))^{\text{Term\_c}}))$$

##Check the syntax below whether the formula syntax is correct or not

WhatsApp | Property Management: Definition | Buy | Salesforce

mvmuthaihgovartscollegefo-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003bHck/FieldsAndRelationships/view

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 Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules

Fields & Relationships 10 Items, Sorted by Field Label

	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy	Buy__c	Percent(18, 0)		
Buy Name	Name	Text(80)		
City	City__c	Picklist		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
PropertyType	PropertyType__c	Picklist		
State	State__c	Picklist		

WhatsApp | Property Management: Definition | Rent | Salesforce

mvmuthaihgovartscollegefo-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003bJb8/FieldsAndRelationships/view

Setup Home Object Manager

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 Search Layouts List View Button Layout Restriction Rules

Fields & Relationships 7 Items, Sorted by Field Label

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(1)		

The screenshot shows the Salesforce Object Manager interface for the 'Loan' object. The left sidebar has a 'Fields & Relationships' section selected. The main area displays a table of fields:

	Field Label	Type
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)

## Mile Stone 6: Profile

To create a new profile:

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (standard user is preferable) → enter profile name → save
2. Enter a Profile Name
3. Click on the new created profile
4. While still on the profile page, then click Edit
5. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile
6. Sales Manager → Standard user Profile , Marketing Executive1 and Executive2 → Standard Platform User, Marketing Manager → Standard Platform user For

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main content area displays the 'Standard User' profile details. The profile name is 'Standard User', user license is 'Salesforce', and it is a 'Custom Profile'. The 'Description' field is empty. Below the profile detail, the 'Page Layouts' section is visible, showing various standard object layouts assigned to different objects like Global, Email Application, Home Page Layout, Account, and Alternative Payment.

Name	Standard User	User License	Salesforce	Custom Profile	✓
Description					

Standard Object	Layout	Object	Milestone Layout
Global	Global Layout [View Assignment]	Object	Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Alternative Payment	Alternative Payment Method Layout	Order	Order Layout

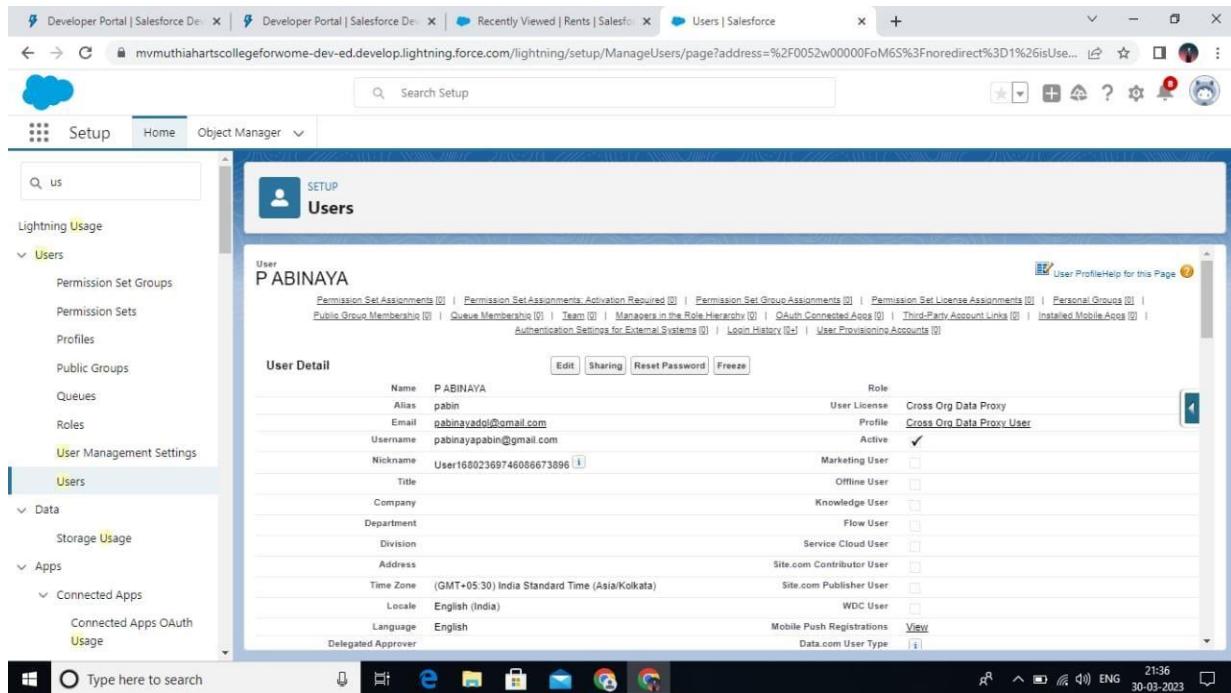
This screenshot shows the same Salesforce Setup interface as the previous one, but with more detailed information visible in the 'Profile Detail' section. It includes fields for 'Created By' (PABINAYA, 10/04/2023, 10:42 am) and 'Modified By' (PABINAYA, 10/04/2023, 10:43 am). The rest of the interface is identical to the first screenshot.

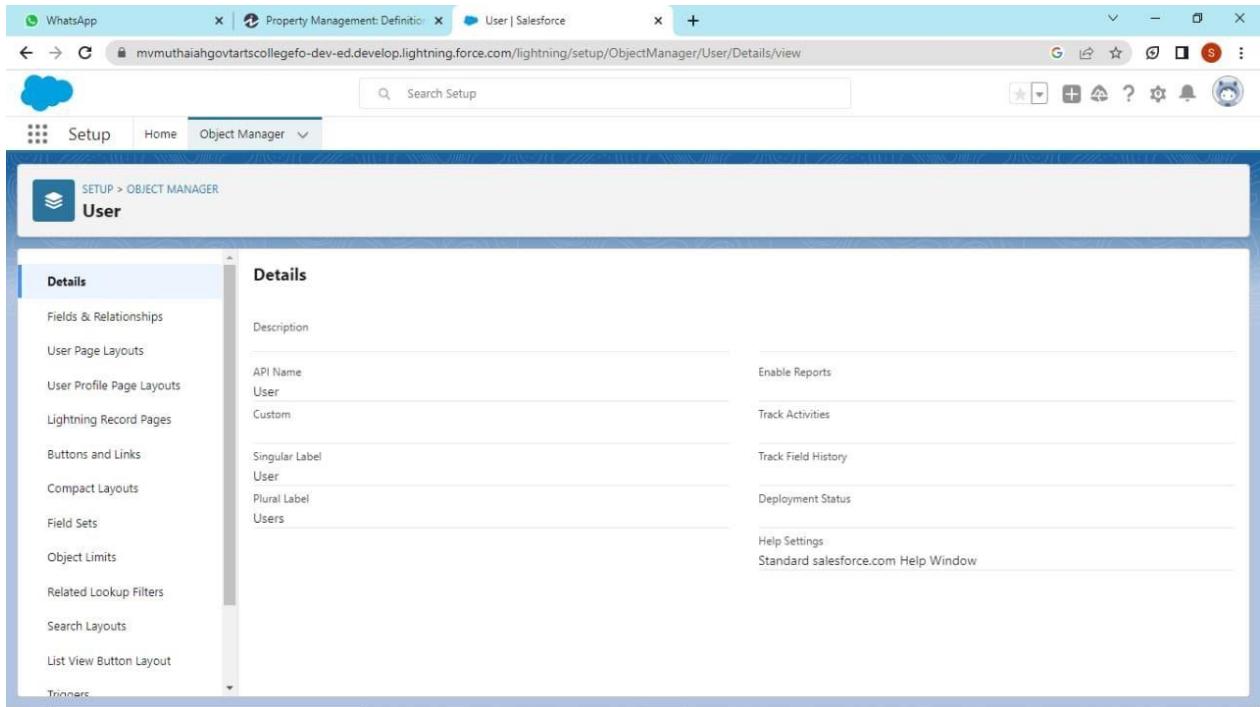
Name	Standard User	User License	Salesforce	Custom Profile	✓
Description					

## Mile Stone 7: User

## Create User

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the Fields (first name ,last name,alais,email id, user name, nick name, role, user license, → profiles) save





## Mile Stone 8:Permission Set

### Create the Permission Sets

1. Go to setup → type “permission sets” in quick search → select permission sets → New.
2. Enter the label name → 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

## Mile Stone 9: Setup for OWD

### Create OWD Setting

1. Setup, use the Quick Find box to find Sharing Settings.
2. Click Edit in the Organization-Wide Defaults area.
3. For each object, select the default access you want to give everyone.
4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Lead, Rent custom object.
5. Click Edit and from the Drop Down select private for internal and external
6. This Setting is for all the User Which have been Created

Home | Salesforce | Sharing Settings | Salesforce | Sharing Settings ~ Salesforce -

mvmuthiahgovtartscollegefo-dev-ed.develop.my.salesforce.com/p/own/OrgSharingDetail?appLayout=setup&noS1Redirect=true

**Sharing Settings**

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Default Sharing Settings

Organization-Wide Defaults			
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	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓

Other Settings			
Other Settings Help ?			
Manager Groups	<input type="checkbox"/>	<a href="#">i</a>	
Secure guest user record access	<input checked="" type="checkbox"/>	<a href="#">i</a>	
Require permission to view record names in lookup fields	<input type="checkbox"/>	<a href="#">i</a>	

Sharing Rules

Lead Sharing Rules		New	Recalculate	Lead Sharing Rules Help ?
No sharing rules specified				

Mile Stone10:Report:

## Create Report

1. Go to the app → 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.

The screenshot shows the Salesforce Reports page. At the top, there are three tabs: 'New Custom Object | Salesforce', 'Dashboard | Salesforce', and 'Reports | Salesforce'. Below the tabs, the URL is mvmuthaiahgovtartscollegefo-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru. The main content area is titled 'Reports' and has a sub-section 'Recent' which displays 6 items. A table lists the reports with columns: REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are: Sales, Marketins, Student, Loan Report, Rent, and Buy. The 'Sales' report is in the 'Private Reports' folder and was created by Saranya S on 5/4/2023, 7:33 pm. The 'Marketins' report is also in the 'Private Reports' folder and was created by Saranya S on 5/4/2023, 7:32 pm. The 'Student' report is in the 'Private Reports' folder and was created by Saranya S on 5/4/2023, 7:30 pm. The 'Loan Report' report is in the 'Private Reports' folder and was created by Saranya S on 5/4/2023, 7:29 pm. The 'Rent' report is in the 'Private Reports' folder and was created by Saranya S on 5/4/2023, 7:26 pm. The 'Buy' report is in the 'Private Reports' folder and was created by Saranya S on 5/4/2023, 7:25 pm. To the left of the table, there is a sidebar with sections for 'RECENT', 'FOLDERS', and 'FAVORITES'. The 'RECENT' section shows 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. The 'FOLDERS' section shows 'All Folders'. The 'FAVORITES' section shows 'Created by Me', 'Shared with Me', and 'All Favorites'. At the bottom right of the table, there are buttons for 'Search recent reports...', 'New Report', 'New Folder', and settings.

## Mile Stone 11:Dashboard

### 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

New Lead With Loan Amount | S x +

mvmuthiahgovtartscollegefo-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000atx5EAA/view

Property Management System

Buyers Rents Loans Students Marketins Sales Reports Dashboards Subscriptions

\* New Lead With Loan Amo... x More

Lead with loan amounts

Dashboard New Lead With Loan Amount

As of 10-Apr-2023, 9:50 am Viewing as Saranya S

Loan Report

Student

Sales

View Report (Loan Report)

View Report (Student)

View Report (Sales)

Marketins

Rent

Marketing: Marketing Name ↑

Advertiser

Social Media Marketing

View Report (Buy)

View Report (Student)

View Report (Sales)

Buyers | Salesforce x +

mvmuthiahgovtartscollegefo-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000atx5EAQ/view

Property Management System

Buyers Rents Loans Students Marketins Sales Reports Dashboards Subscriptions

Buyers

As of 10-Apr-2023, 9:54 am Viewing as Saranya S

Buy

Student

Sales

View Report (Buy)

View Report (Student)

View Report (Sales)

Marketins

Loan Report

Marketing: Marketing Name ↑

Advertiser

Social Media Marketing

## **4 Trailhead Profile Public URL**

**Team Lead- A.Mahalakshmi**

<https://trailblazer.me/id/marunachalam2>

**Team Member1- U.Kavimani**

<https://trailblazer.me/I'd/kkavimani1>

**Team Member2- S.Manikandan**

<https://trailblazer.me/id/manis1370>

**Team Member3-K.Karthika**

<https://trailblazer.me/id/kartk103>

## **4. Advantage & Disadvantage**

Advantages:

- ❖ Manage pricing and inventories dynamically.
- ❖ Automate based on your business processes.
- ❖ Integrated with all major online travel portals.
- ❖ Maximize operational efficiency and profitability.
- ❖ Can be integrated with other AppExchange applications.

Disadvantages:

- ❖ Configuration and setup is complex and time consuming.
- ❖ Cluttered interface makes navigation and simple tasks unnecessarily complex.
- ❖ The learning curve never seems to end.
- ❖ Customer support has a poor reputation
- ❖ Getting users to adopt the system.

## **5 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. A property management system is sometimes referred to as a hotel operating system or hotel OS.

- A property management system (PMS) is software that facilitates a hotel's reservation management and administrative tasks.
- The most important function include **front-desk operations, reservations, channel management, housekeeping, rate and occupancy management, and payment processing**.

## **6 Conclusion**

Man a company's sales force is important because it may help improve the efficiency and success of the sales team. This can help increase company revenue and create a positive work environment for sales team members.

**THANKING YOU...**