

# **Property Management Application using SalesForce**

**Submitted By**

**Team Leader :**

- **A.Ancy Seriba**

**Team members:**

- **S.Amala Dayana Rose**
- **L.Lisy Jane**
- **T.Elakkia**

# **1 .INTRODUCTION**

## **OVERVIEW**

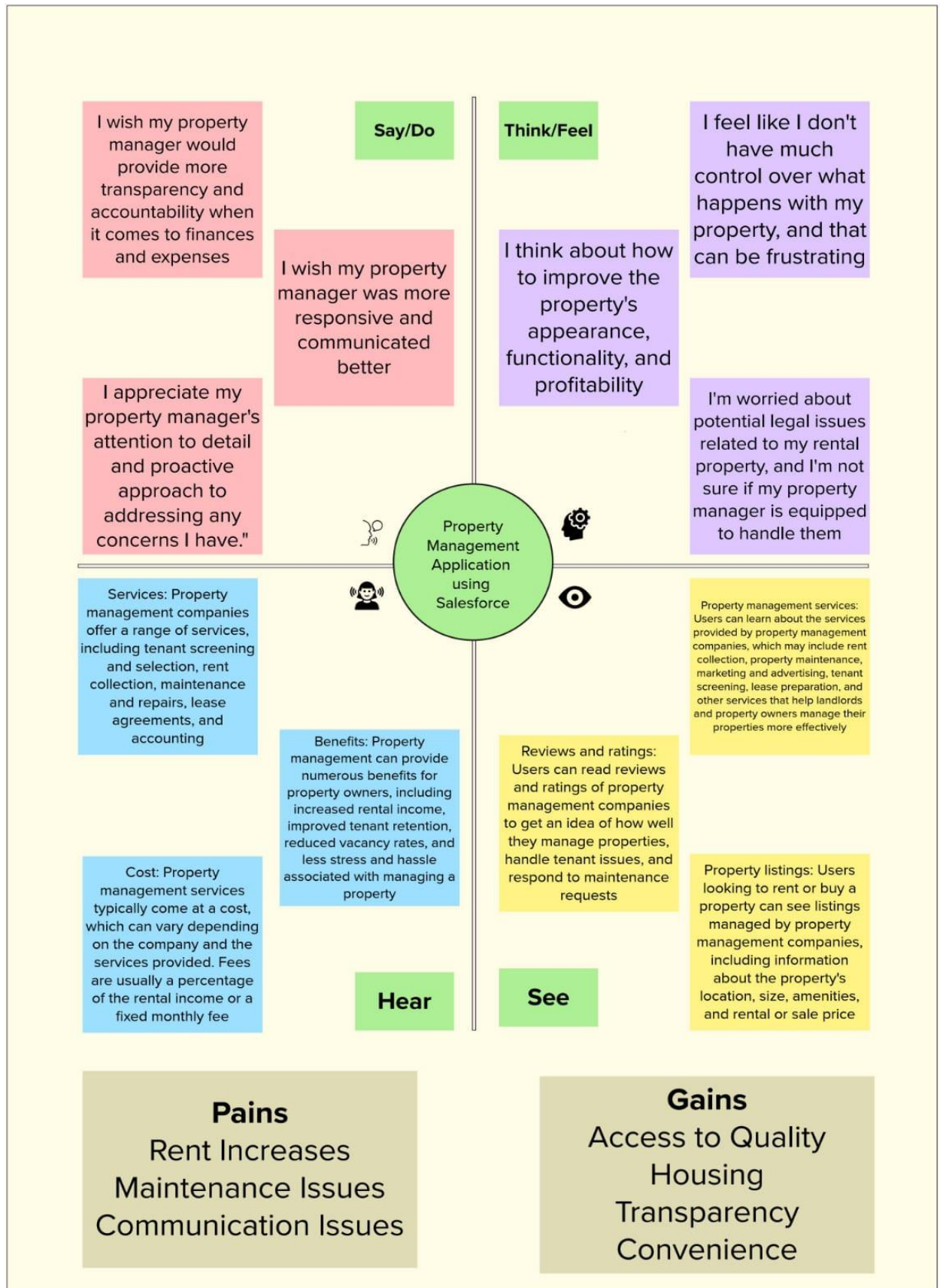
The project is to develop a property management application using the Salesforce platform. This application will be designed to manage real estate properties and will include features such as property listing, tenant management, lease management, rent collection, maintenance scheduling, and reporting. The application will be built using the Salesforce Lightning framework and will leverage the various Salesforce modules and tools to create a comprehensive property management system.

## **PURPOSE**

The purpose of this project is to provide a centralized platform for property managers to manage their real estate properties efficiently. With the increasing demand for property management services, the need for a digital platform to manage these properties has become essential. The Salesforce-based property management application will enable property managers to streamline their workflows, automate their processes, and provide their clients with a better overall experience.


## 2.Problem Definition & Design Thinking

### Empathy Map



# Ideation & Brainstorming Map

Template



## Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

10 minutes to prepare

1 hour to collaborate

2-8 people recommended

➕

### Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

10 minutes

A

#### Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

B

#### Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.

C

#### Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

Open article

1

### Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

5 minutes

PROBLEM

Late rent payments, Maintenance Requests, Tenant turnover.

2

### Key rules of brainstorming

To run an smooth and productive session

Stay in topic.

Encourage wild ideas.

Defer judgment.

Listen to others.

Go for volume.

If possible, be visual.

3

### Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

Person 1

Clearly communicate rent due dates and late fees to tenants at the time of lease signing and in all subsequent communications.

Offer convenient rent payment options such as online payments, automatic payments or credit/debit card payments.

Send reminders a few days before the rent is due and follow up promptly with late rent notices as soon as rent is past due.

Person 2

Establish a consistent and firm policy for late rent payments and enforce it consistently with all tenants.

Consider offering incentives such as discounts on rent for on-time payments or referral bonuses for tenants who encourage other tenants to pay on time

Offer multiple channels for tenants to submit maintenance requests such as online portal, email, phone, or in-person.

Person 3

Prioritize and respond to maintenance requests based on their urgency and severity.

Provide regular updates to tenants on the status of their maintenance requests.

Conduct regular property inspections to identify potential maintenance issues before they become major problems.

Person 4

Conduct regular surveys to gather feedback from tenants and identify areas for improvement.

Respond to tenant complaints and issues in a timely manner to improve tenant satisfaction and reduce turnover

Offer amenities and services that are important to tenants such as on-site laundry, parking, and fitness centers

3

### Group Ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

20 minutes

💡

Conduct regular property inspections to identify potential maintenance issues before they become major problems.

💡

Offer multiple channels for tenants to submit maintenance requests such as online portal, email, phone, or in-person.

💡

Respond to tenant complaints and issues in a timely manner to improve tenant satisfaction and reduce turnover

💡

Conduct regular surveys to gather feedback from tenants and identify areas for improvement

💡

Offer convenient rent payment options such as online payments, automatic payments or credit/debit card payments.

💡

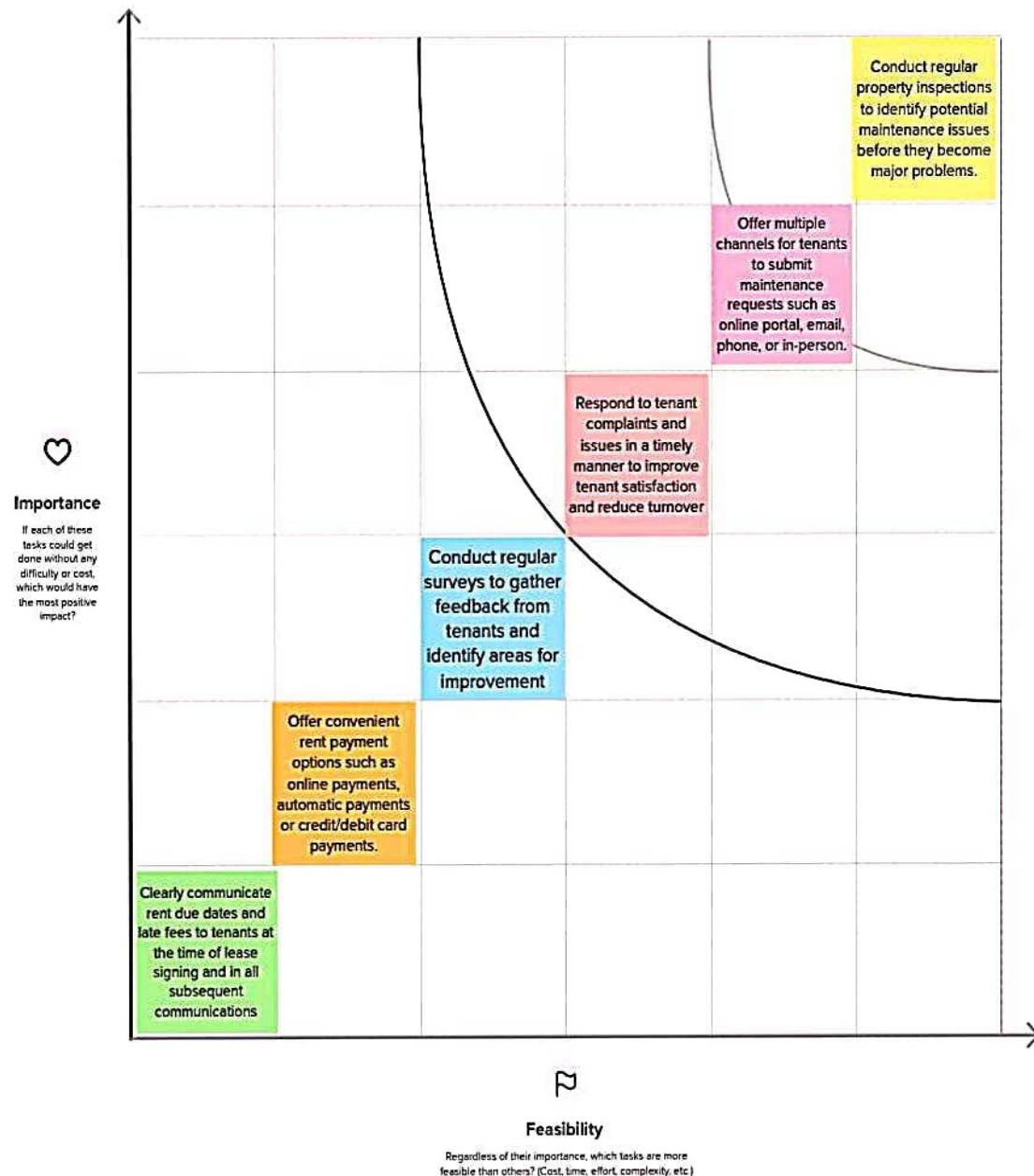
Clearly communicate rent due dates and late fees to tenants at the time of lease signing and in all subsequent communications.

4

## Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are Important and which are feasible.

⌚ 20 minutes



3.RESULT  
DATA MODEL

Object Name	Fields in the Object	
Lead (Standard Object)	Field Label	Data Type
	Lead	AutoNumber
	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
Buy (Custom Object)	Field Label	Data Type
	Property Type	Picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
	Annual Amount to be Paid	Currency

<b>Object Name</b>	<b>Fields in the Object</b>	
<b>Rent (Custom Object)</b>	<b>Label Name</b>	<b>Data Type</b>
	<b>Rent</b>	<b>AutoNumber</b>
	<b>Rental City</b>	<b>Text</b>
	<b>BHK Type</b>	<b>Picklist</b>
<b>Loan (Custom Object)</b>	<b>Label Name</b>	<b>Data Type</b>
	<b>Loan Id</b>	<b>Auto Number</b>
	<b>Interest Rate</b>	<b>Percentage</b>
	<b>Term</b>	<b>Number</b>
	<b>Annual Loan</b>	<b>Number</b>
	<b>Total Loan Instalments</b>	<b>Number</b>
	<b>Loan Repayment</b>	<b>Number</b>
	<b>Loan Amount</b>	<b>Formula</b>

### **3.ACTIVITY AND SCREENSHOTS**

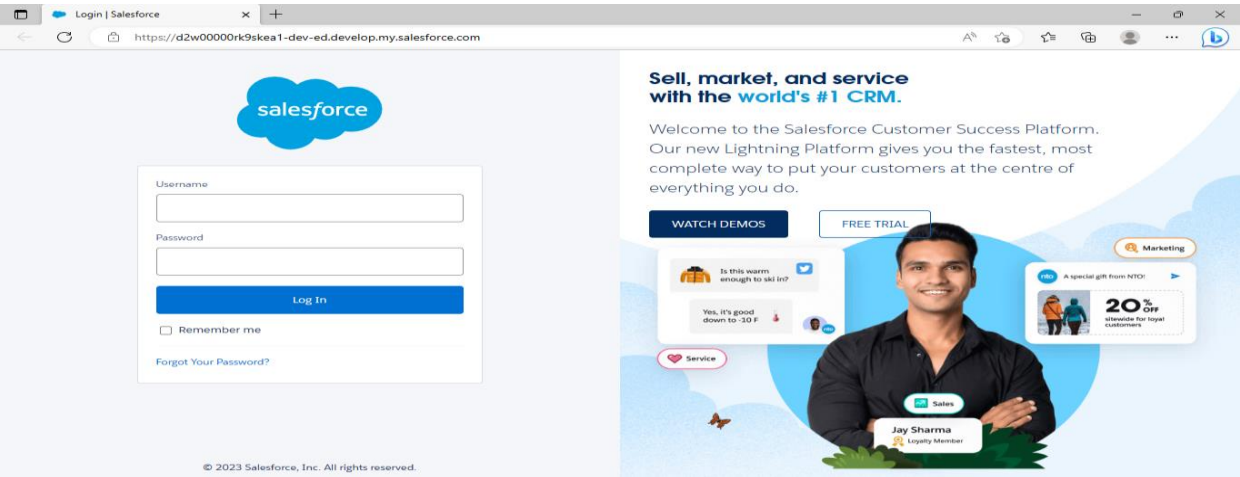
#### **ACTIVITES**

- ☐ SALESFORCE ACCOUNT ACTIVATION
- ☐ OBJECT
- ☐ TAB
- ☐ THE LIGHTNING APP
- ☐ FIELDS
- ☐ PROFILE
- ☐ NEW USER
- ☐ PERMISSION SET
- ☐ SETUP FOR OWD
- ☐ REPORT
- ☐ DASHBOARDS



# ACCOUNT ACTIVATION

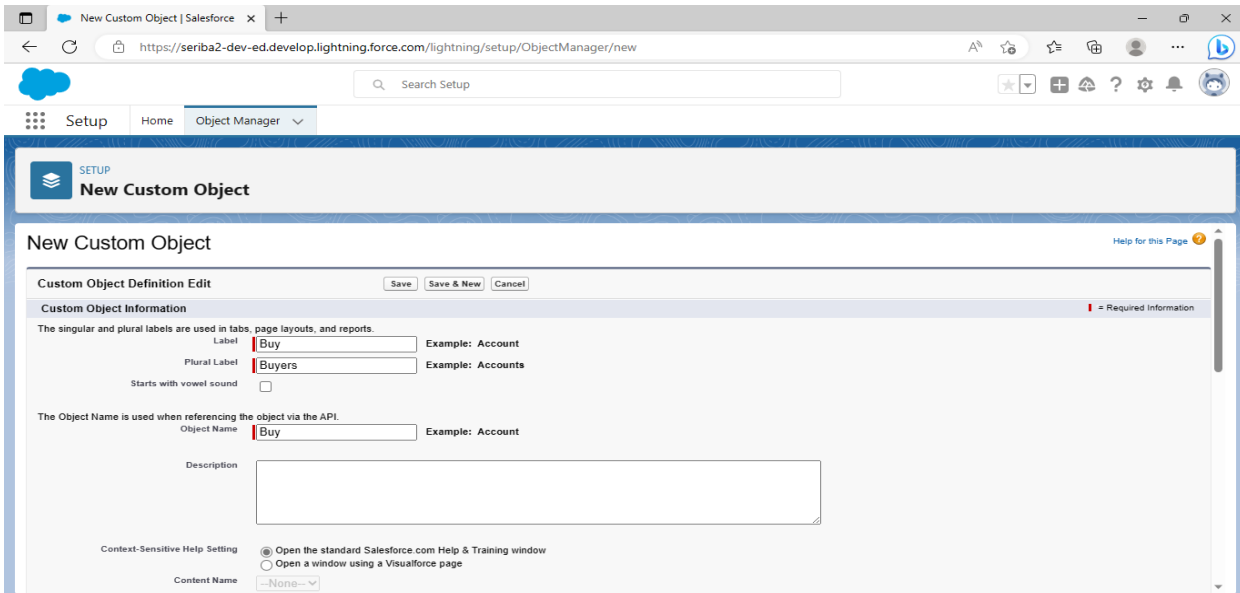
We have created a developer account by using the website `developers.salesforce.com` and activated the account by using the password while created account.



# OBJECT

We have created three custom objects for this Property Management Application with labels 1) Buy 2) Rent 3) Loan.

## Buy



# Rent

New Custom Object | Salesforce

https://seriba2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

SetupHomeObject Manager

SETUP

New Custom Object

New Custom Object

Help for this Page

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

Required Information

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

Label

Rent

Example: Account

Plural Label

Rents

Example: Accounts

Starts with vowel sound

☐

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

Object Name

Rent

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

--None--

# Loan

New Custom Object | Salesforce

https://seriba2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

SetupHomeObject Manager

SETUP

New Custom Object

New Custom Object

Help for this Page

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

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Label

Loan

Example: Account

Plural Label

Loans

Example: Accounts

Starts with vowel sound

☐

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

Object Name

Loan

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

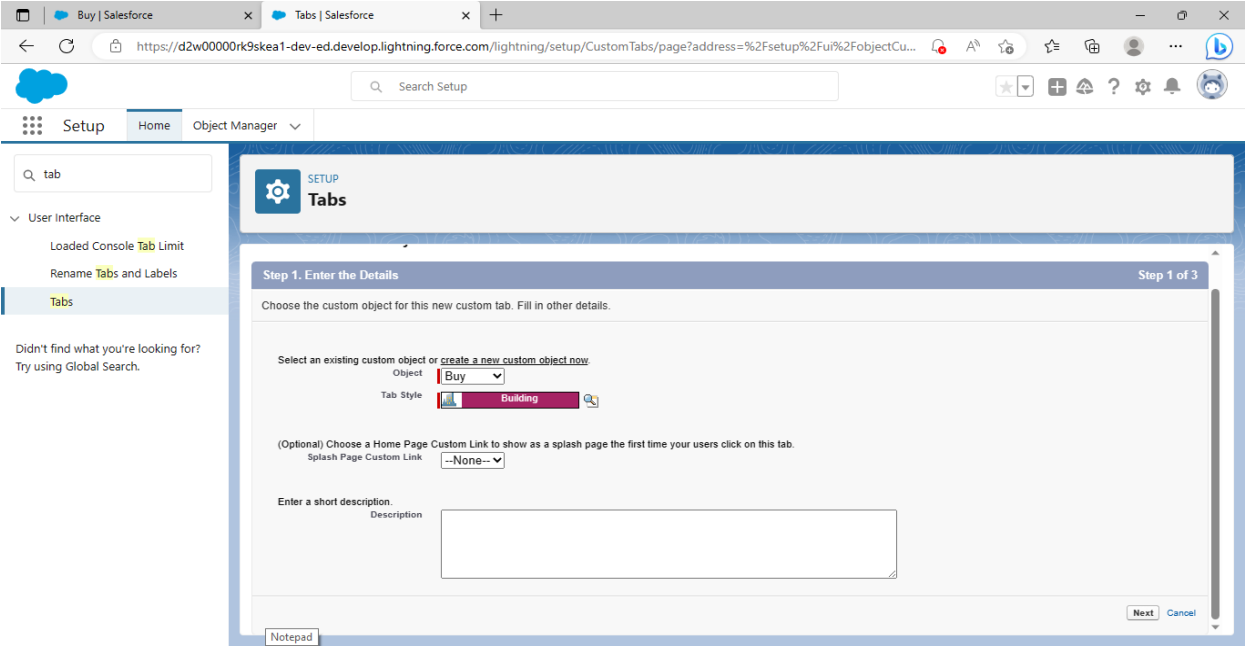
☐ Open a window using a Visualforce page

Content Name

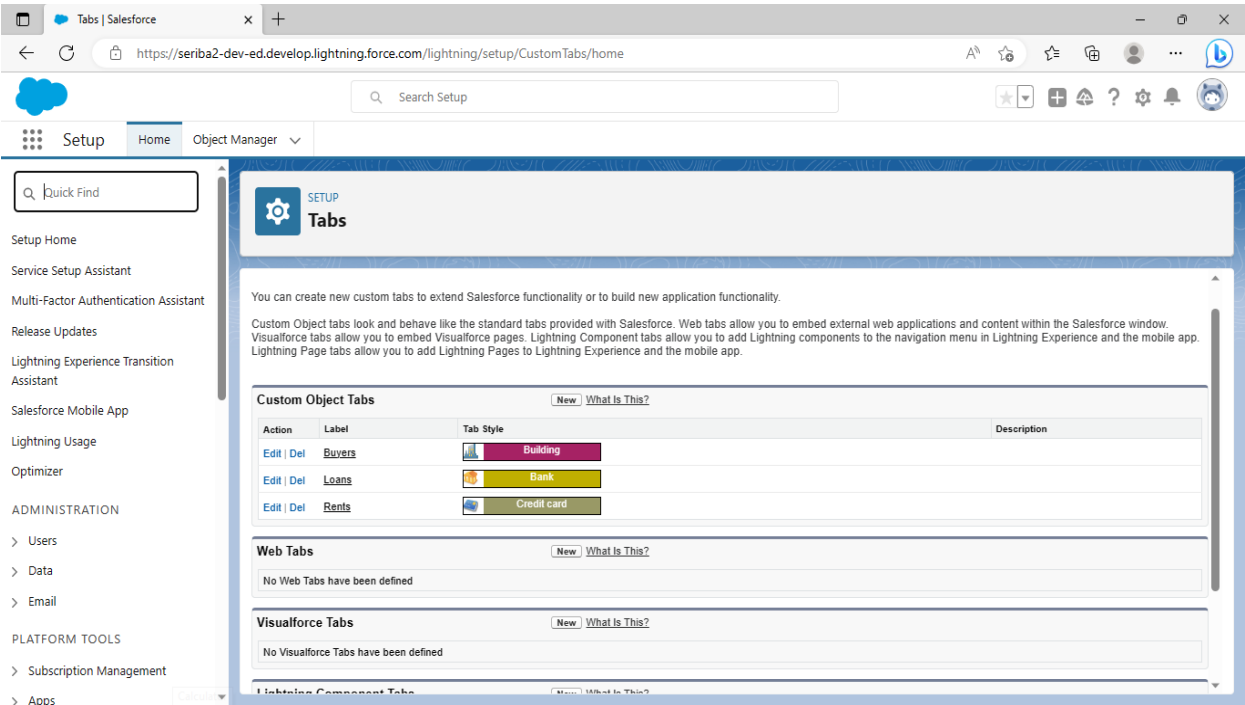
--None--

# ■ Tab

We have created three tabs that are relates to our application 1) Buy  
2) Rent and 3) Loan under Custom Object Tabs

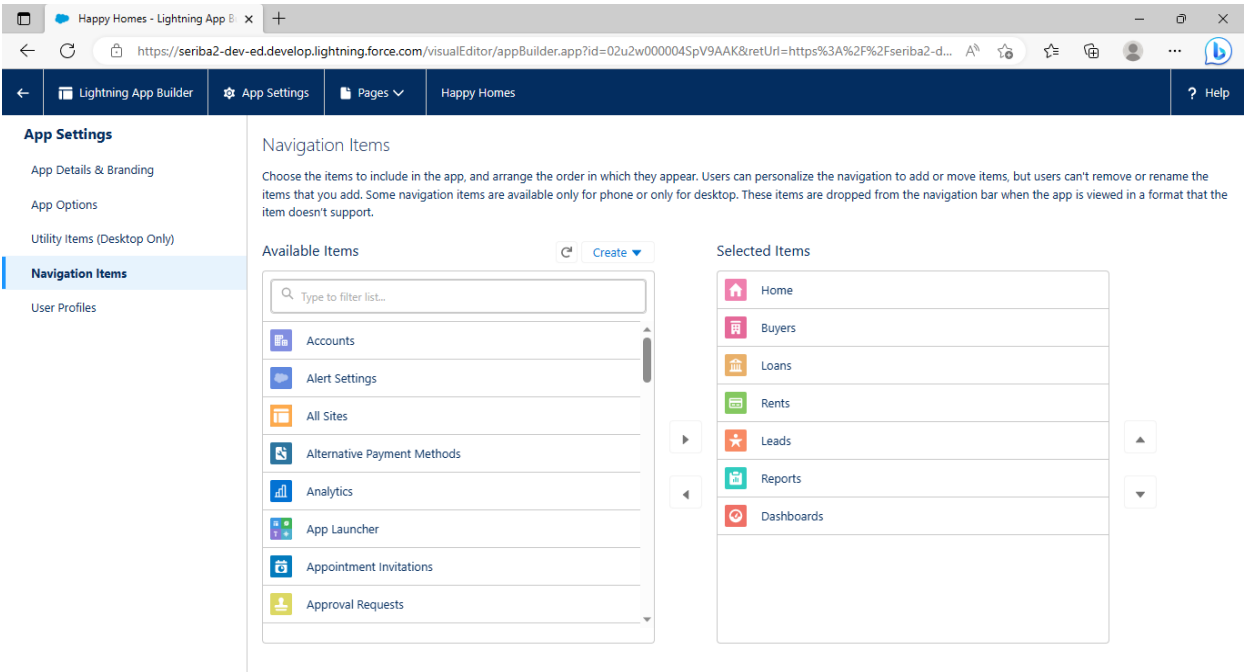
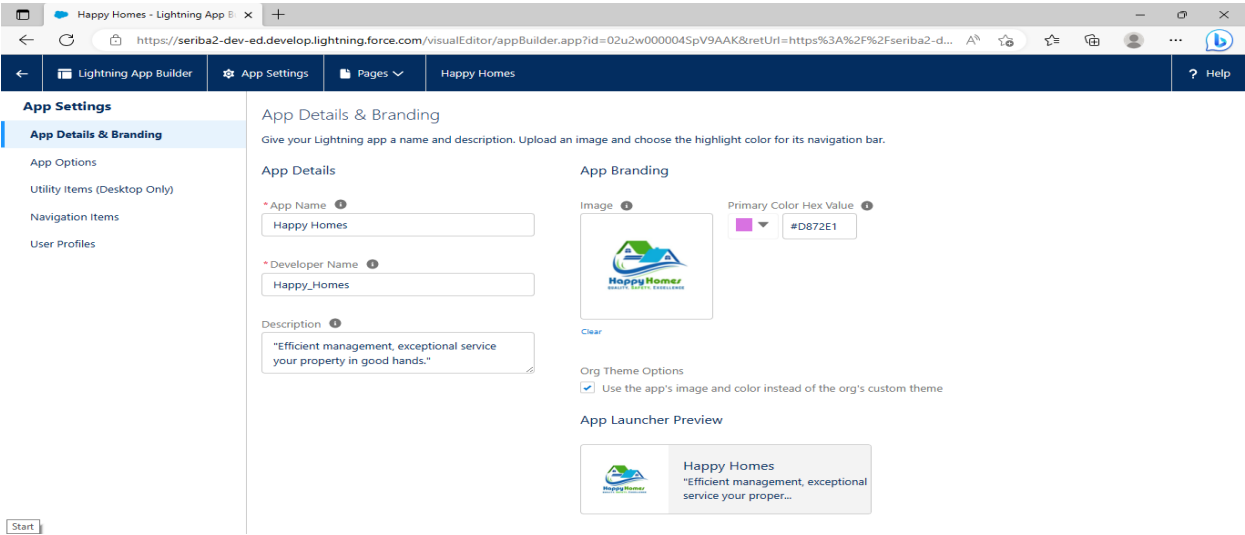


## Tabs we created



# ■ Creating The Lightning App

We went into setup page, then search app manager in quick find box then selected the app manager then clicked on New Lightning App. We've filled the app name as Happy Homes in app details and added navigation items Home, Buy, Rent, Loan, Lead, Report and Dashboard. Also, we've added User Profiles, System Administrator, Standard Platform User and Standard User.



Happy Homes - Lightning App

https://seriba2-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000004SpV9AAK&retUrl=https%3A%2F%2Fseriba2-d...

Lightning App BuilderApp SettingsPagesHappy HomesHelp

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

User Profiles

Choose the user profiles that can access this app.

Available Profiles

standard pld

Standard Platform User

Selected Profiles

System Administrator

Standard User

Cancel

Save

Home | Salesforce

https://seriba2-dev-ed.develop.lightning.force.com/lightning/page/home

Search...

Happy HomesHomeBuyersLoansRentsLeadsReportsDashboards

Dashboard

Loan

As of 14-Apr-2023, 2:43 pm Viewing as Ancy Seriba A

OpenRefreshSubscribe

New Lead With Loan Report

Sum of Interest Rate

32.7%

View Report (New Lead With Loan Report)

Loan Amount

₹11,64,853.92

₹27,38,001.25

₹29,11,556.94

₹46,75,734.87

New Lead With Loan Report

32.7%

View Report (New Lead With Loan Report)

New Lead With Loan Report

Loan: Loan Name ↑	Loan: ID	Loan Amount	Interest Rate	Term	Total Loan Instalments	Loan Repayment	Annual Loan
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Today's Events

Looks like you're free and clear the rest of the day.

View Calendar

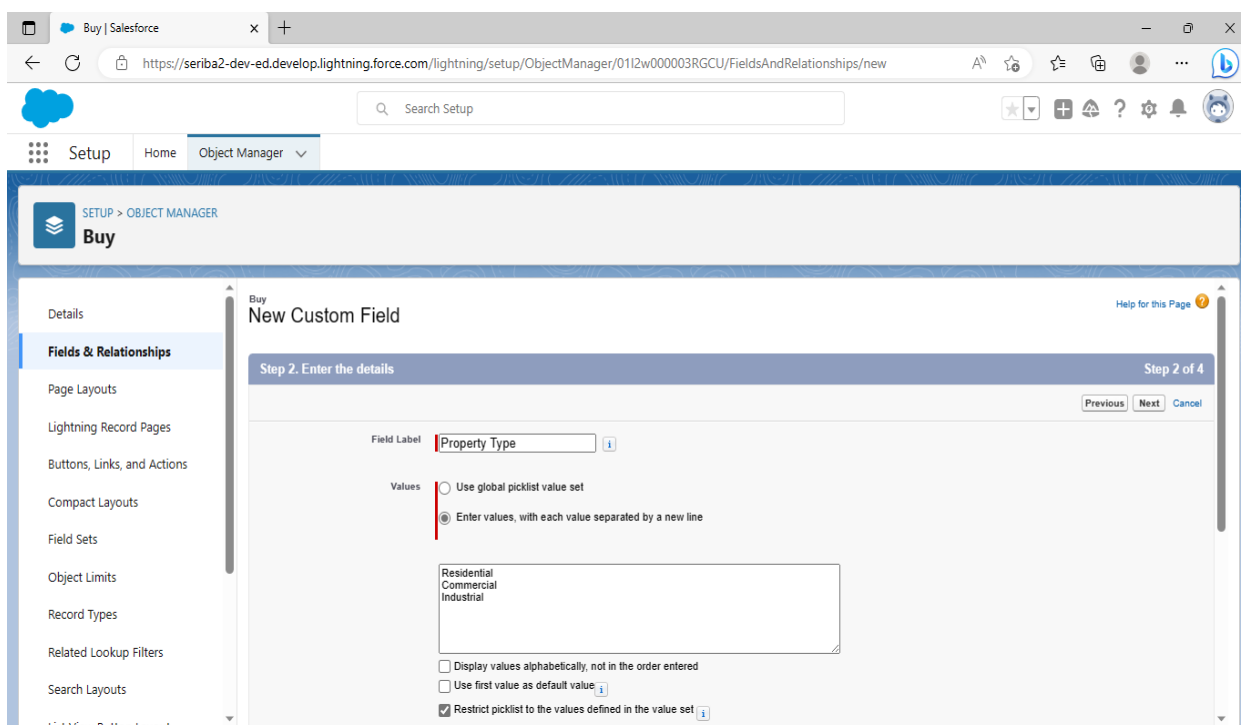
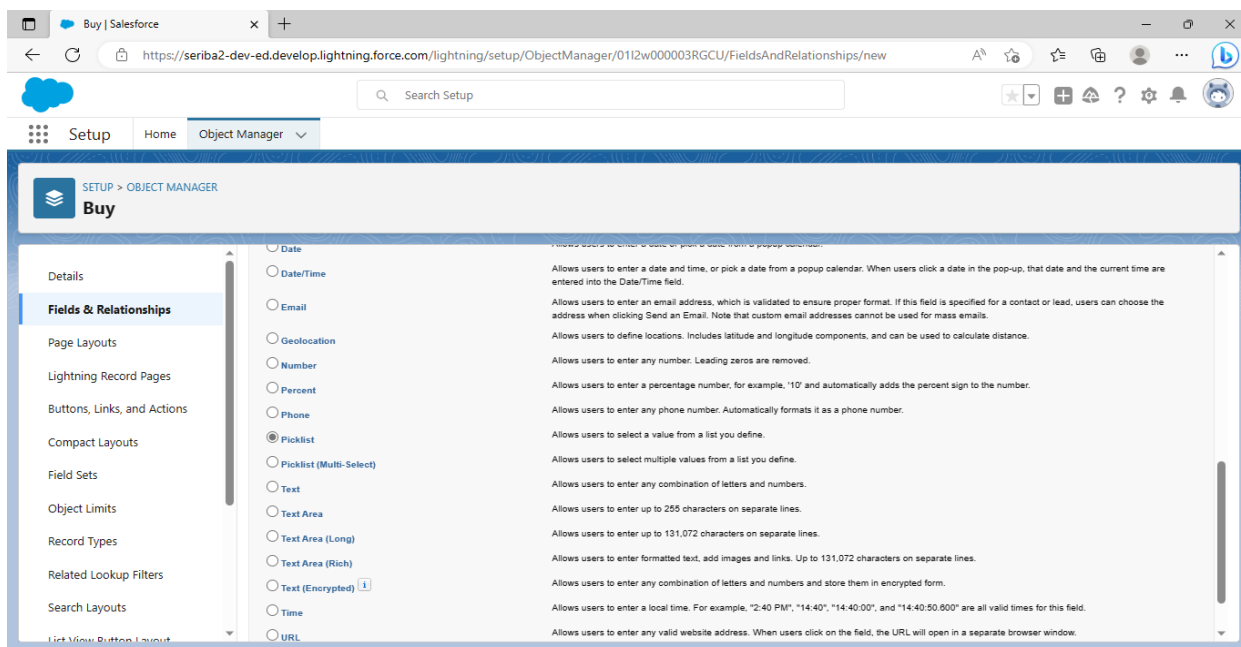
Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

View All

## ■ Fields

We went into the Object Manager and chose the object which we were intended to create Fields. After choosing the object, we clicked on Fields & Relationships the clicked New. We chose the data type for the required Fields and clicked Next and Filled Label Names then clicked Next and saved.



We've created Five Fields for the Object Lead such as Lead, State, City, Email and Phone

Screenshot of the Salesforce Setup page for the Lead object, showing the Fields & Relationships section. The page displays a list of fields and their relationships.

Field Name	Field Label	Field Type	Relationship
Lead	Lead_c	Auto Number	
Lead Owner	OwnerId	Lookup(User, Group)	✓
Lead Source	LeadSource	Picklist	
Lead Status	Status	Picklist	
Mobile	MobilePhone	Phone	
Name	Name	Name	✓
No. of Employees	NumberOfEmployees	Number(8, 0)	
Number of Locations	NumberOfLocations_c	Number(3, 0)	
Phone	Phone	Phone	

We've also created Field dependencies

Screenshot of the Salesforce Setup page for the Lead object, showing the Fields & Relationships section. The page displays a table for field dependencies.

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

State:	Maharashtra	Gujarat	Rajasthan
City:	Mumbai	Mumbai	Mumbai
	Pune	Pune	Pune
	Nashik	Nashik	Nashik
	Surat	Surat	Surat
	Ahmedabad	Ahmedabad	Ahmedabad
	Jaipur	Jaipur	Jaipur
	Sikar	Sikar	Sikar

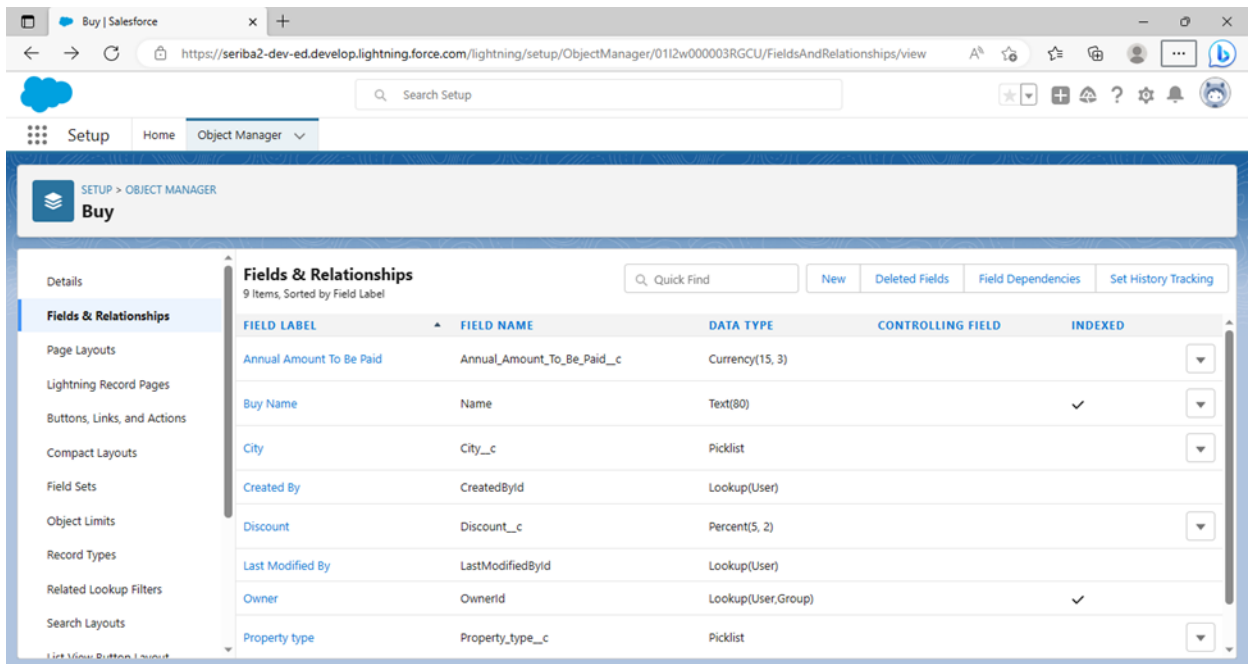
Showing Columns: 1 - 3 (of 3) < Previous | Next > View All Go to

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Save Cancel Preview

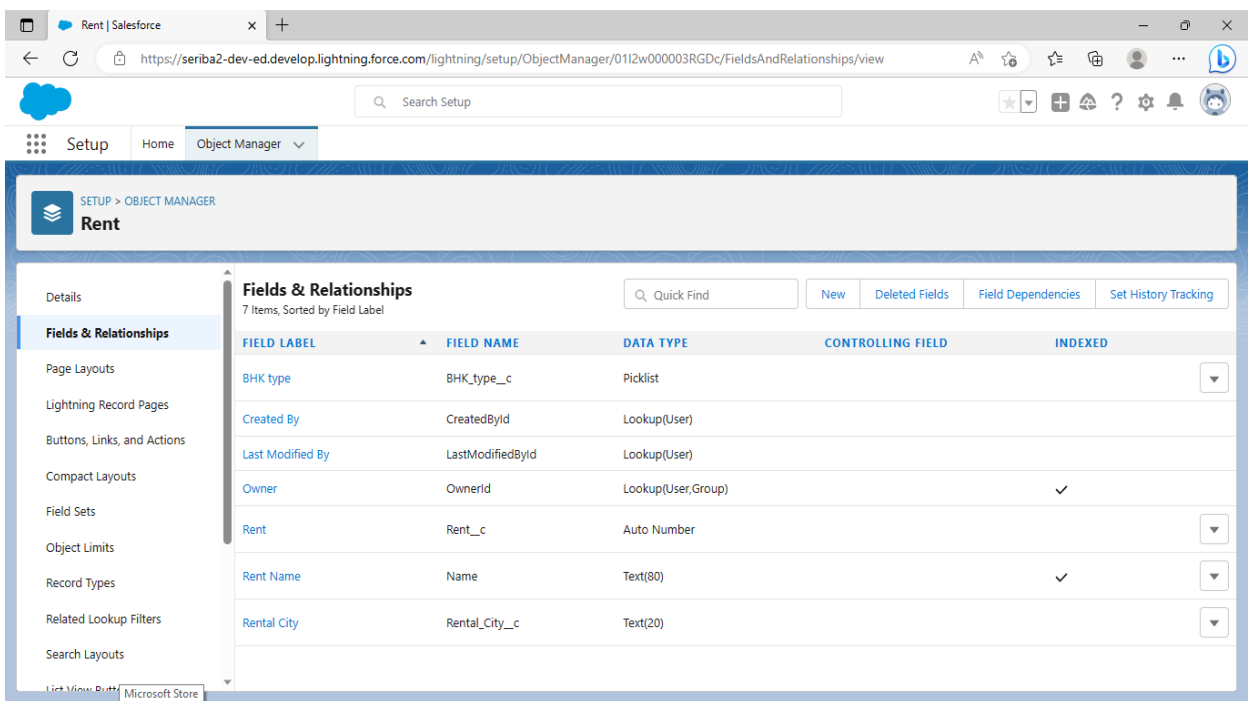
We've created Five Fields for Buy such as Property Type, Discount, State, City and Annual Amount to be Paid



The screenshot shows the Salesforce Setup interface for the 'Buy' object. The 'Fields & Relationships' section is active, displaying a list of 9 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Amount To Be Paid	Annual_Amount_To_Be_Paid__c	Currency(15, 3)		
Buy Name	Name	Text(80)		✓
City	City__c	Picklist		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(5, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Property type	Property_type__c	Picklist		

We've created Three Fields for Rent such as Rent, Rental City and BHK Type

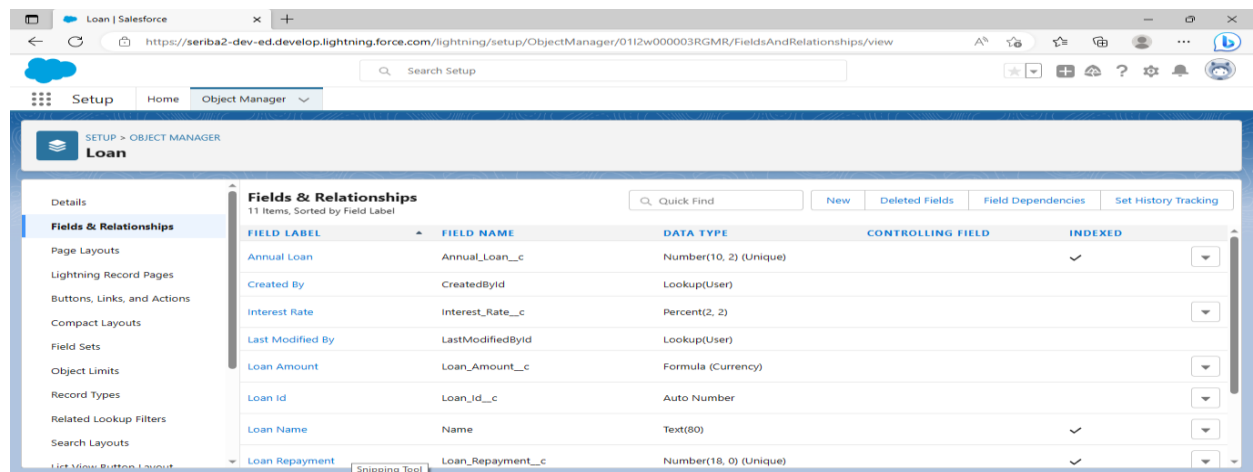


The screenshot shows the Salesforce Setup interface for the 'Rent' object. The 'Fields & Relationships' section is active, displaying a list of 7 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot.

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(20)		



We've created Seven Fields for Loan such as Loan ID, Interest Rate, Term, Annual Loan, Total Loan Instalments, Loan Repayment and Loan Amount.



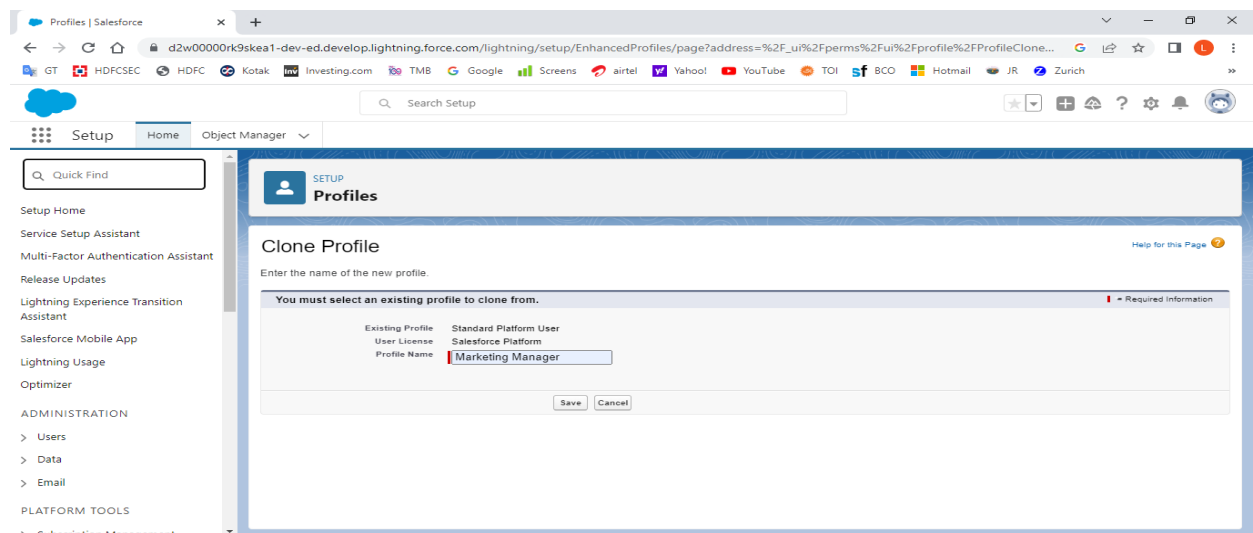
The screenshot shows the Salesforce Setup interface for the 'Loan' object. The 'Fields & Relationships' section is active, displaying a list of 11 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(10, 2) (Unique)		✓
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Percent(2, 2)		
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) (Unique)		✓

## ■ Profile

We have created three Profiles for Marketing under Standard Platform users such as Marketing Manager, Marketing Executive 1, Marketing Executive 2 And, also created Four Profiles for Sales such as Sales Manager, Sales Rep 1, Sales Rep 2 and Sales Rep 3 under Standard User.

Once all the above said profiles are created we've delegated Read, Create, Edit and Delete access to the Sales and Marking Managers, Read and Create access to Marketing Executive 1 & 2, Read, Create and Edit access to Sales Rep 1 & 2 and Read only access to Sales Rep 3.



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Clone Profile' dialog is open, prompting the user to enter the name of the new profile. The dialog also displays a list of existing profiles to clone from.

**Clone Profile**

Enter the name of the new profile

You must select an existing profile to clone from.

Existing Profile	User License	Profile Name
Standard Platform User	Salesforce Platform	Marketing Manager

Buttons: Save, Cancel

Profiles | Salesforce

https://seriba2-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000wq5Q

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

SETUP

Profiles

Profile

Marketing Manager

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Edit Clone Delete View Users

Name	Marketing Manager	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Ancy Seriba A, 29/03/2023, 3:05 pm	Modified By	Ancy Seriba A, 03/04/2023, 11:29 am

Page Layouts

Standard Object Layouts			
Global	Global Layout (View Assignment)	Object Milestone	Object Milestone Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Operating Hours	Operating Hours Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)	Order	Order Layout (View Assignment)
Account	Account Layout	Order Product	Order Product Layout

Profiles | Salesforce

d2w00000rk9skea1-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000xDkp%2Fe%3FretURL%3D%252F...

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

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Optimizer

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SETUP

Profiles

Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Buyers	✓	✓	✓	✓	✓		Rents	✓	✓	✓	✓	✓	
Loans	✓	✓	✓	✓	✓								

Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

--None--

Password Policies

User passwords expire in

90 days

Enforce password history

3 passwords remembered

Minimum password length

8

Password complexity requirement

Must include alpha and numeric characters

Password question requirement

Cannot contain password

# Profiles created for Marketing

Profiles | Salesforce

https://seriba2-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

profil

UsersProfiles

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

SETUPProfiles

Profiles

All Profiles Edit Delete Create New View

New Profile

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Marketing_Executive_1	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Marketing_Executive_2	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Marketing_Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Marketing_User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>

1-5 of 50 Selected

PreviousNext

Page 1 of 1

# Profiles created for Sales

Profiles | Salesforce

https://seriba2-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

profil

UsersProfiles

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

SETUPProfiles

Profiles

All Profiles Edit Delete Create New View

New Profile

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Sales_Manager	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Sales_Rep_1	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Sales_Rep_2	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Sales_Rep_3	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Solution Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	System Administrator	Salesforce	<input type="checkbox"/>

1-10 of 100 Selected

PreviousNext

Page 1 of 1

## ■ Users

We have assigned users to the respected Profiles. We went into Users menu and clicked New Users then filled the Fields like first name, last name, alias, email id, username, nick name, role, user license, profiles.

Users | Salesforce

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

Setup Users

New User

Help for this Page

User Edit

Save Save & New Cancel

General Information

First Name Ancy

Last Name Seriba

Alias aseri

Email ancyseriba@gmail.com

Username ancy77@gmail.com

Nickname User1681478434929381152

Title

Company

Department

Division

Role Marketing Team

User License Salesforce Platform

Profile Marketing Manager

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

## Some of the Users we have created

Users | Salesforce

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New User

<Previous Page | Next Page>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Ancy Seriba	aseri	ancyseriba@gmail.com	Sales Rep 1	<input checked="" type="checkbox"/>	Cross Org Data Proxy User
<input type="checkbox"/> Edit	Ancy Seriba	AA	ancy@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Arasan Elakia	earas	elakiaarasan14@gmail.com	Marketing Executive 2	<input checked="" type="checkbox"/>	Marketing Executive 2
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rkmsmeah.zvxtcolliuu@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Jane Lisy	ljane	lisviane@gmail.com	Marketing Executive 1	<input checked="" type="checkbox"/>	Marketing Executive 1
<input type="checkbox"/> Edit	L. Jane	lj	lisvy@gmail.com	Sales Manager	<input checked="" type="checkbox"/>	Cross Org Data Proxy User
<input type="checkbox"/> Edit	L. Jane	lj	lisvy@gmail.com	Sales Rep 2	<input checked="" type="checkbox"/>	Force.com - Free User
<input type="checkbox"/> Edit	L. Moshina	LM	lmoshina@gmail.com	Sales Rep 3	<input checked="" type="checkbox"/>	Sales Rep 3
<input type="checkbox"/> Edit	Seriba Ancy	aseri	ancy77@gmail.com	Marketing Manager	<input checked="" type="checkbox"/>	Marketing Manager
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000rkmsmeah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User

Show me more records per list page

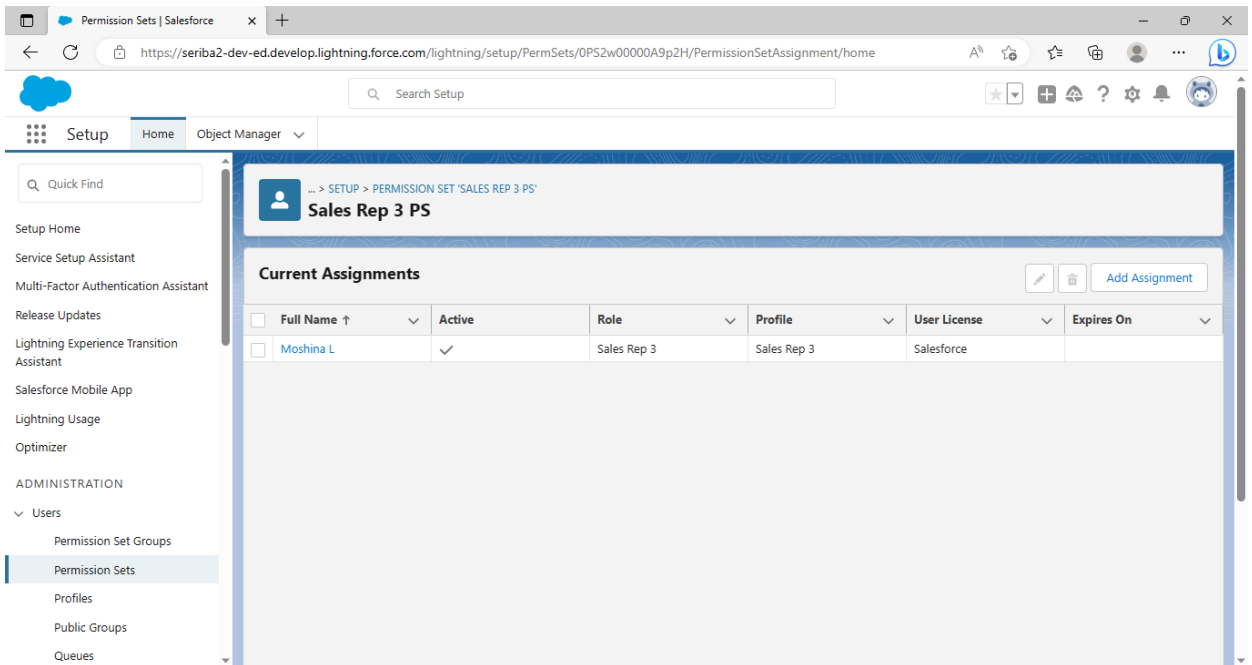
New User Reset Password(s) Add Multiple Users

## ■ Permission Set

We went into Permission Sets and clicked on New. We've entered the label name as Sales Rep3 PS and saved. After saving, we have clicked on the Manage assignment and added Sales Rep3 into it and saved. After all this done, we have given Create access for Sales Rep3 in permission set.

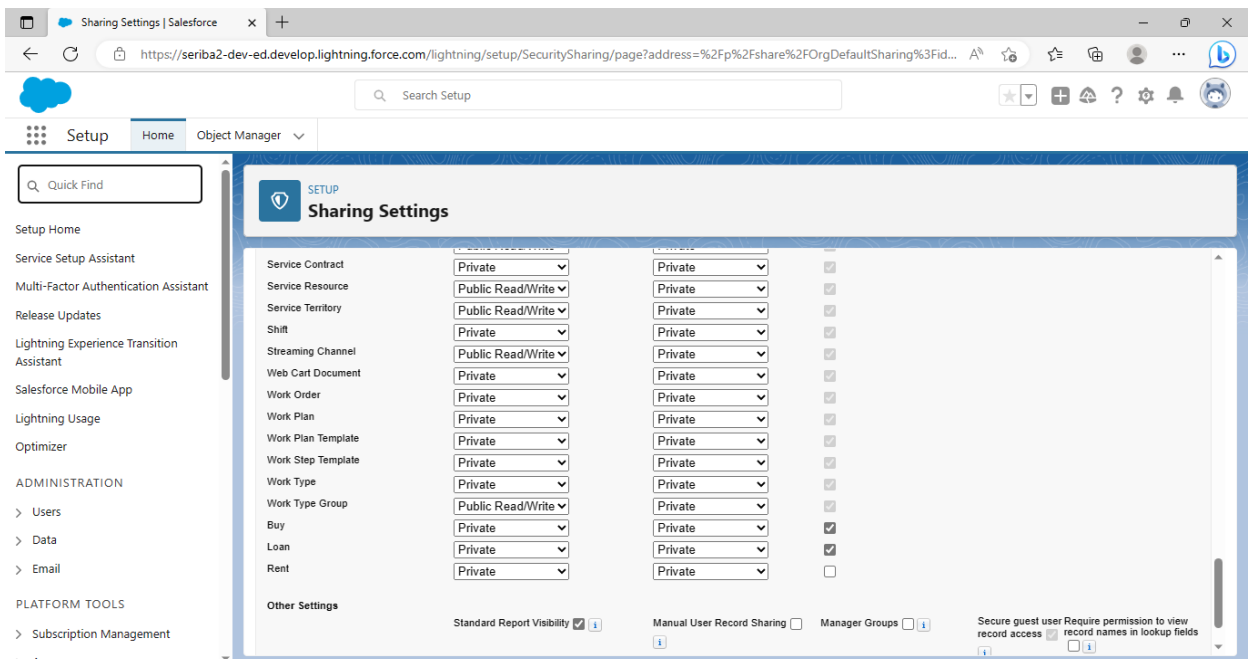
The screenshot shows the Salesforce 'Permission Sets' page in the 'Create' mode. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Permission Sets' and 'Create'. It features a 'Save' button and a 'Cancel' button. Below these is a section 'Enter permission set information' with fields for 'Label' (SalesRep3 PS), 'API Name' (SalesRep3\_PS), and 'Description'. There is also a checkbox for 'Session Activation Required'. Below this is a section 'Select the type of users who will use this permission set' with a dropdown menu and a list of instructions: '-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.', and '-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.'

The screenshot shows the Salesforce 'Permission Sets' page in the 'Overview' mode for the 'SalesRep3 PS' permission set. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Subscription Management), and a search bar. The main content area is titled 'Permission Sets' and 'SalesRep3 PS'. It features a 'Find Settings...' search bar and buttons for 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments'. Below these is a section 'Permission Set Overview' with fields for 'Description', 'License', 'Session Activation Required', 'API Name' (SalesRep3\_PS), 'Namespace Prefix', 'Created By' (Ligy Jane L, 14/04/2023, 6:37 pm), and 'Last Modified By' (Ligy Jane L, 14/04/2023, 6:37 pm). Below this is a section 'Apps' with links for 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', and 'App Permissions'.



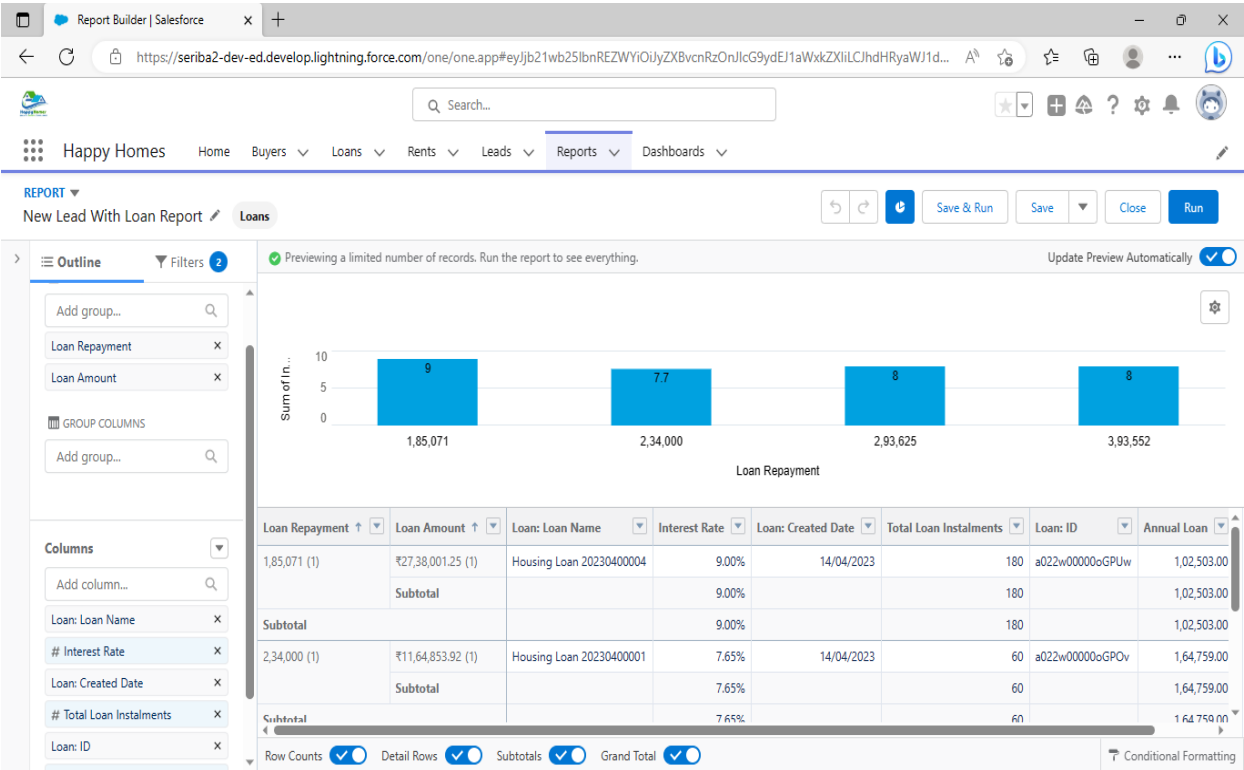
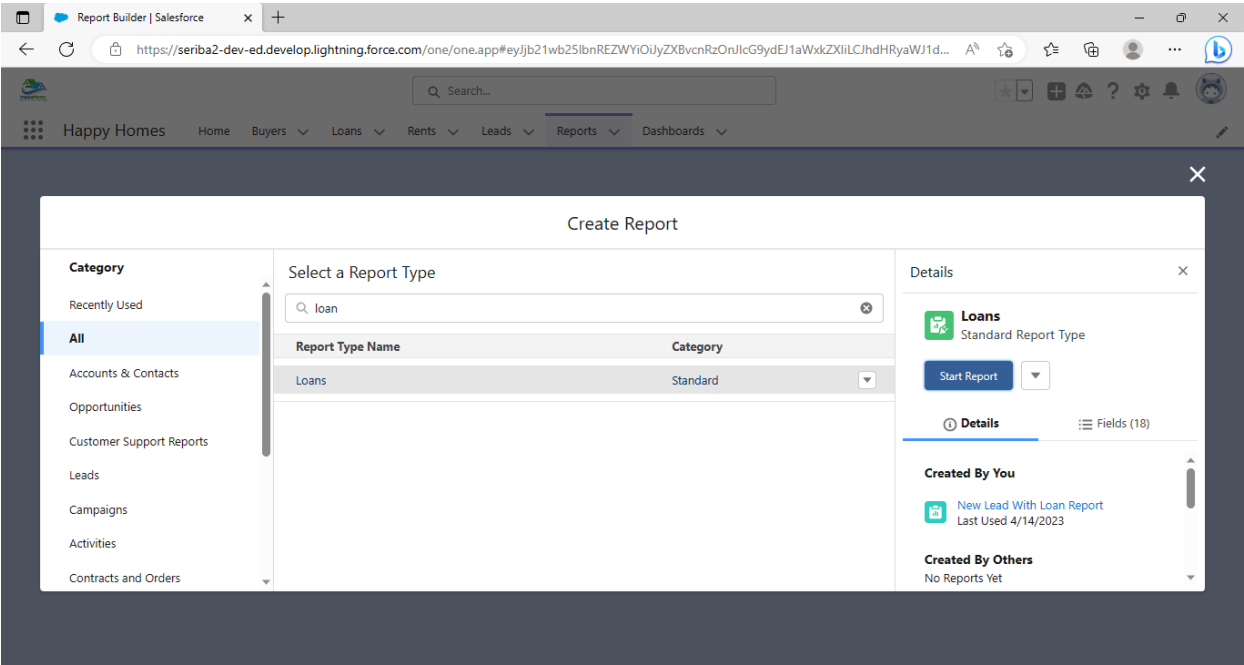
- **Setup for OWD**

To create OWD settings, we have entered into Sharing Settings and Edited the Organization-Wide Default area. To disable automatic access using hierarchies, we've deselected Grant Access for Lead, Rent custom object. Then, from the Drop Down we have enabled private option for Lead and Rent for internal and external.



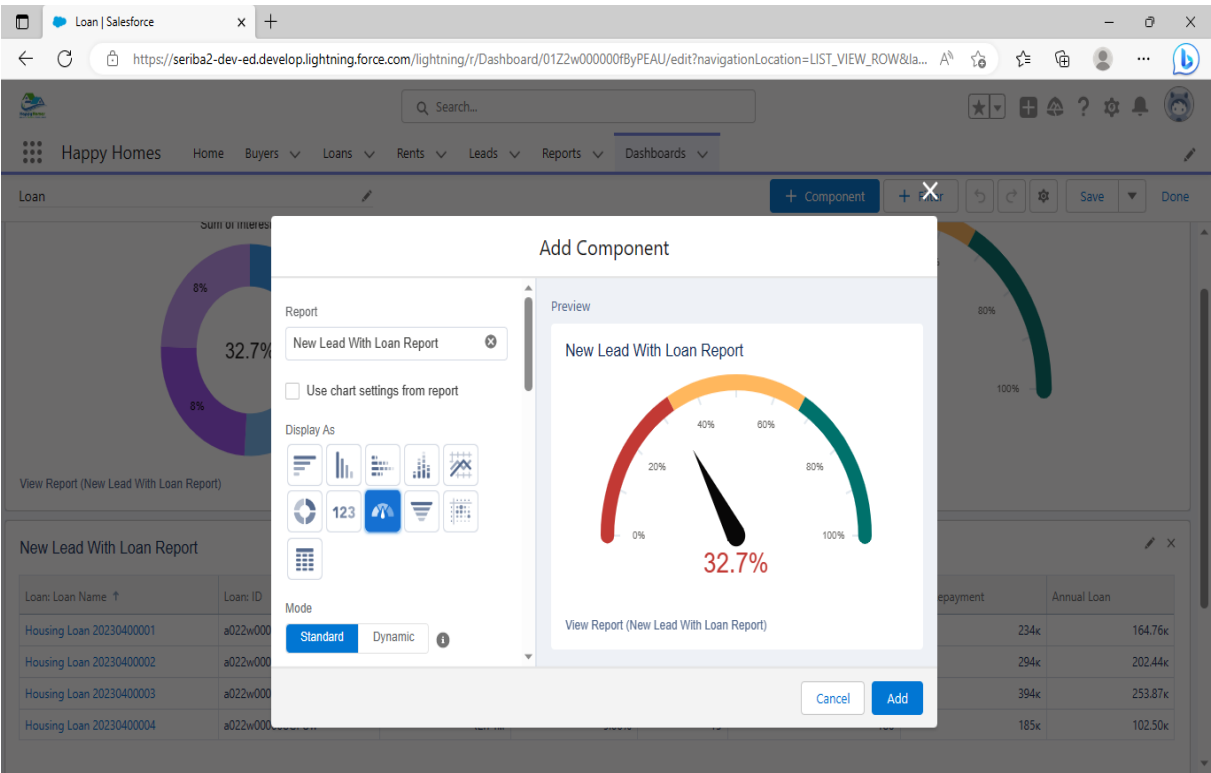
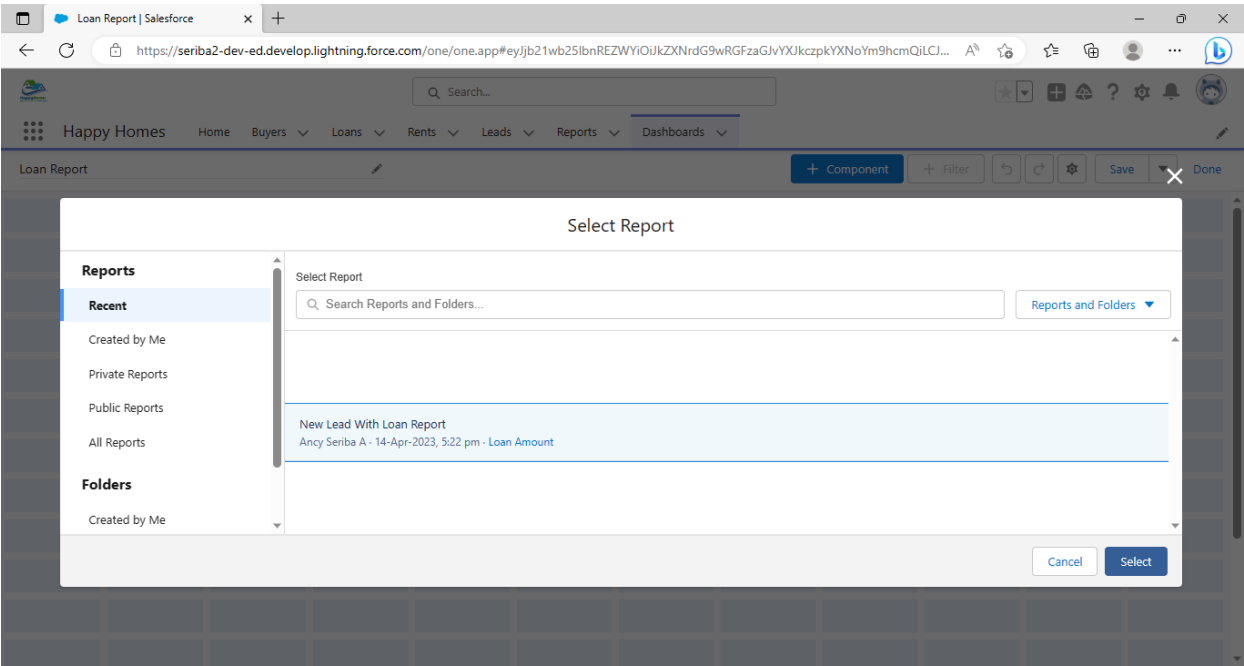
■ Report

We have entered into our App Happy Homes and clicked on Report Tab then clicked New Report. We have chosen the report type category as Loan and clicked on start report, customised it and saved.

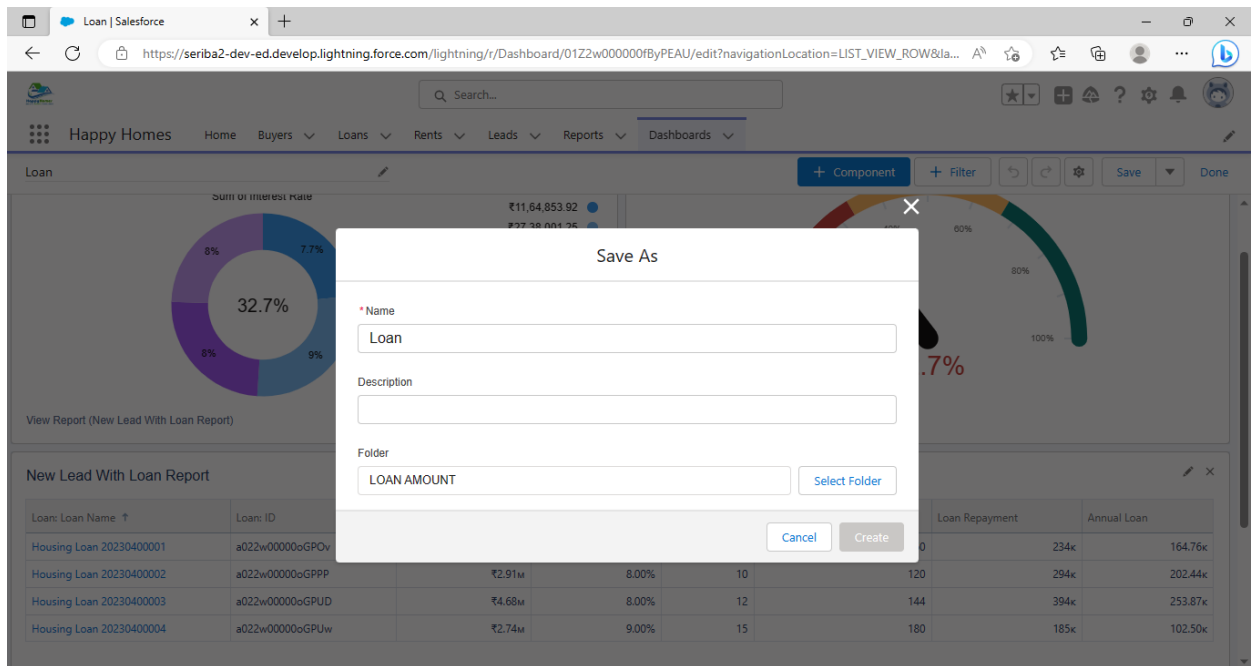


■ **Dashboard**

From our App, we have created New Dashboard and selected new lead with loan report from Loan folder and added component. Then, chose the chart types and saved.







## 4. Trailhead Profile Public URL

Team Lead: A. Ancy Seriba  
<https://trailblazer.me/id/ancya2>

Team Member 1: S. Amala Dayana Rose  
<https://trailblazer.me/id/savariyapitchai>

Team Member 2: L. Lisy Jane  
<https://trailblazer.me/id/lisyl>

Team Member 3: T. Elakkia  
<https://trailblazer.me/id/etamilarasan>

## **5.ADVANTAGES & DISADVANTAGES**

### **ADVANTAGES**

- The Salesforce platform is highly customizable, allowing developers to create a tailored solution to meet the unique needs of property management.
- The application will provide a centralized platform to manage all aspects of real estate properties, including listing, leasing, tenant management, rent collection, and maintenance scheduling.
- The application will be cloud-based, providing property managers with the flexibility to manage their properties from anywhere, at any time.
- The Salesforce platform is highly secure, providing property managers with peace of mind that their data is protected.
- The application will be integrated with other Salesforce tools, such as Salesforce CRM, providing property managers with a comprehensive solution to manage their properties and their clients.

### **DISADVANTAGES**

- Developing a Salesforce-based application can be time-consuming and complex, requiring skilled developers.
- The Salesforce platform can be expensive, especially for small property management companies, as they may not have the resources to implement and maintain the application.
- The application may require significant customization to meet the specific needs of the property management company, which can add to the development time and cost.

## **6.APPLICATIONS:**

The property management application can be used by property management companies of any size. It will enable property managers to streamline their workflows, automate their processes, and provide their clients with a better overall experience. The application can also be used by real estate agents to manage their rental properties and provide a better service to their clients.

## **7.CONCLUSIONS:**

The property management application developed using Salesforce will provide property managers with a comprehensive platform to manage their properties efficiently. With the increasing demand for property management services, the application will enable property managers to provide their clients with a better overall experience and improve their operational efficiency. While there are some disadvantages, such as the complexity and cost of developing a Salesforce-based application, the advantages of the application far outweigh the drawbacks.

## **8.FUTURE SCOPE:**

The property management application can be further enhanced with additional features such as AI-based predictive maintenance, mobile applications for tenants, and enhanced reporting and analytics. The application can also be integrated with third-party tools such as accounting software and property management tools to provide a comprehensive solution for property managers. As the demand for property management services continues to grow, the future scope of the application is vast, with significant potential for growth and innovation.