

1. INTRODUCTION

1.1 Overview


To develop an app for the property management where buyer can order his requirements and get the appropriate details of the property.

1.2 Purpose

According to the interest of the customer to provide him with some discounts, if he is interested in taking loan so for to give the details how much loan the customer can get.

2. Problem Definition & Design Thinking

2.1 Empathy Map



Empathy map


Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

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1

Build empathy

The information you add here should be representative of the observations and research you've done about your users.



Says

What have we heard them say?
What can we imagine them saying?

- Can't get loan in the internet
- Playing more wait for the property
- I will be interested in the property for a while time
- To get the property's document and fee
- To provide with some discounts
- To enter the measurement

Thinks

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?


- Whether the property safe
- Only cash payment option
- I think the house is not worth a single penny
- I couldn't find the property's agent
- I need a loan option
- I couldn't get information about all the property
- I will be interested in the property


Does

What behavior have we observed?
What can we imagine them doing?

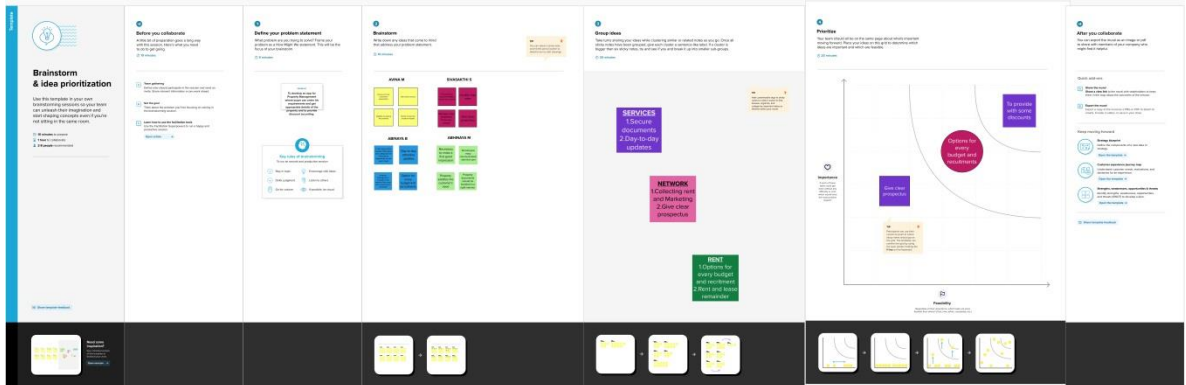
Feels

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?





2.2 Ideation & Brainstorming Map



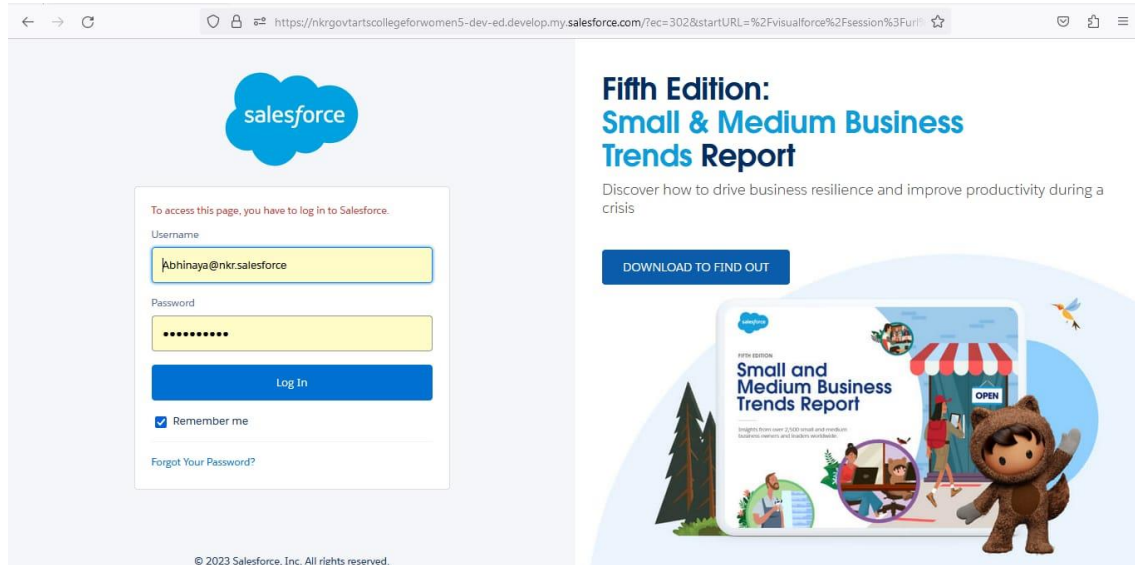
3. RESULT

3.1 Data Model:

Object name	Fields in the Object																
3.2 Activit c t i v i t y	<table> <tr> <th>Field label</th><th>Data type</th></tr> <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> </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																
Buy & S c r e e n	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Property Type</td><td>Picklist</td></tr> <tr> <td>Discount</td><td>Percentage</td></tr> <tr> <td>State</td><td>Picklist</td></tr> <tr> <td>City</td><td>Picklist</td></tr> <tr> <td>Annual Amount</td><td>Currency</td></tr> </table>	Field label	Data type	Property Type	Picklist	Discount	Percentage	State	Picklist	City	Picklist	Annual Amount	Currency				
Field label	Data type																
Property Type	Picklist																
Discount	Percentage																
State	Picklist																
City	Picklist																
Annual Amount	Currency																
Rent s h o t	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Rent</td><td>Auto Number</td></tr> <tr> <td>Rental</td><td>Text</td></tr> <tr> <td>BHK type</td><td>Picklist</td></tr> </table>	Field label	Data type	Rent	Auto Number	Rental	Text	BHK type	Picklist								
Field label	Data type																
Rent	Auto Number																
Rental	Text																
BHK type	Picklist																
Loan	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Loan Id</td><td>Auto Number</td></tr> <tr> <td>Interest Rate</td><td>Currency</td></tr> <tr> <td>Term</td><td>Number</td></tr> <tr> <td>Annual Loan</td><td>Number</td></tr> <tr> <td>Total Loan Instalments</td><td>Number</td></tr> <tr> <td>Loan Repayment</td><td>Number</td></tr> <tr> <td>Loan Amount</td><td>Formula</td></tr> </table>	Field label	Data type	Loan Id	Auto Number	Interest Rate	Currency	Term	Number	Annual Loan	Number	Total Loan Instalments	Number	Loan Repayment	Number	Loan Amount	Formula
Field label	Data type																
Loan Id	Auto Number																
Interest Rate	Currency																
Term	Number																
Annual Loan	Number																
Total Loan Instalments	Number																
Loan Repayment	Number																
Loan Amount	Formula																

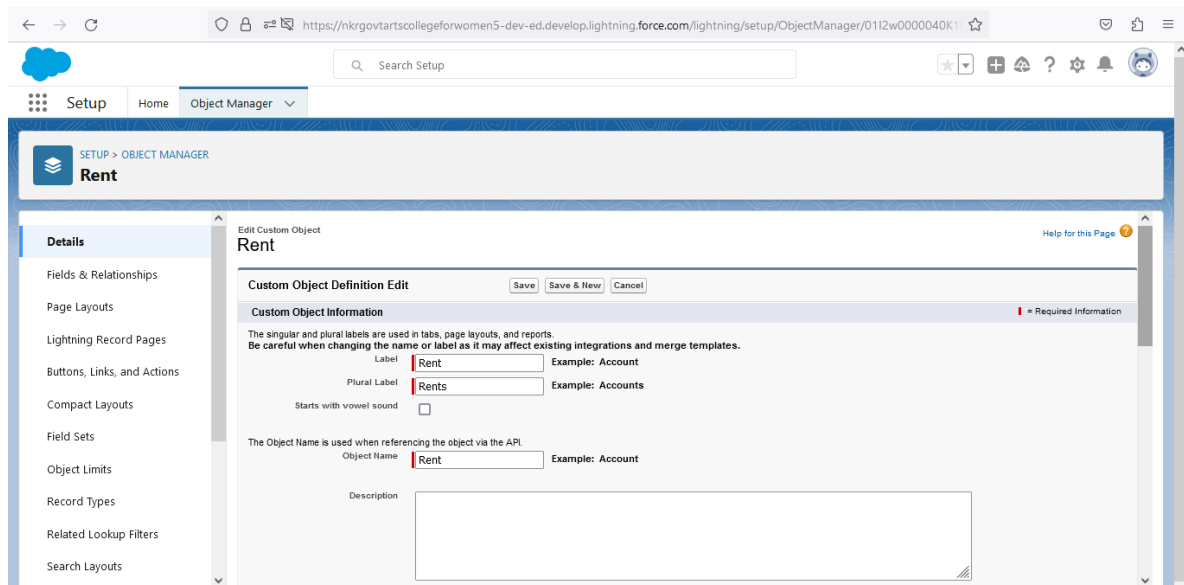
Screenshots:

Salesforce:



We created developer account in salesforce and login to the page to do our projects.

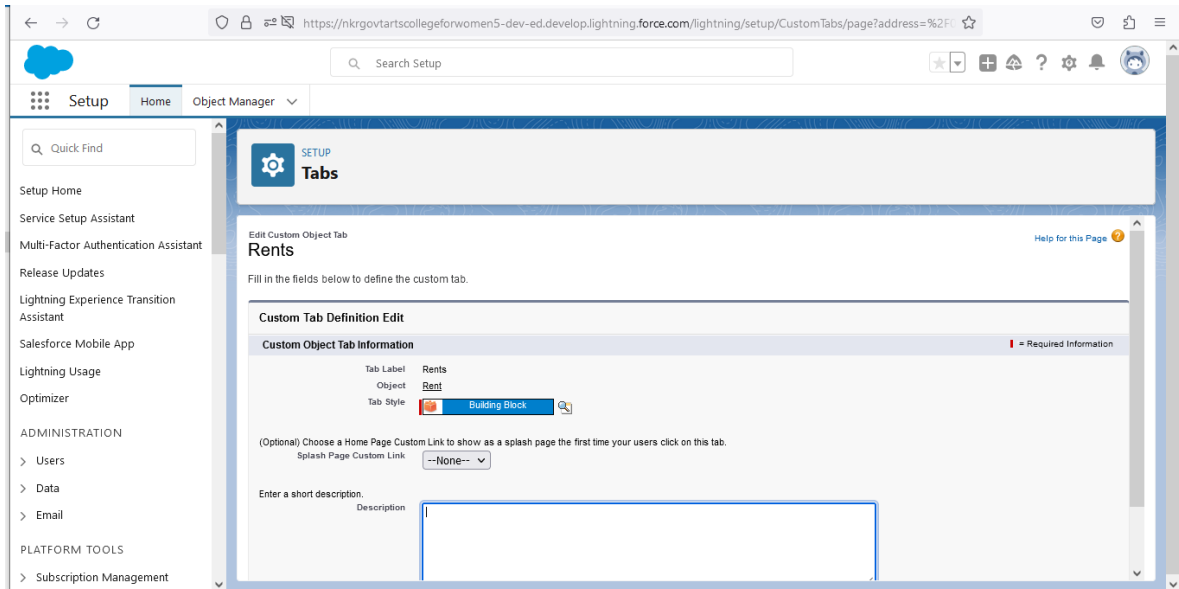
Objects:



In the object manager we created three custom objects,

- Buy
- Rent
- Loan

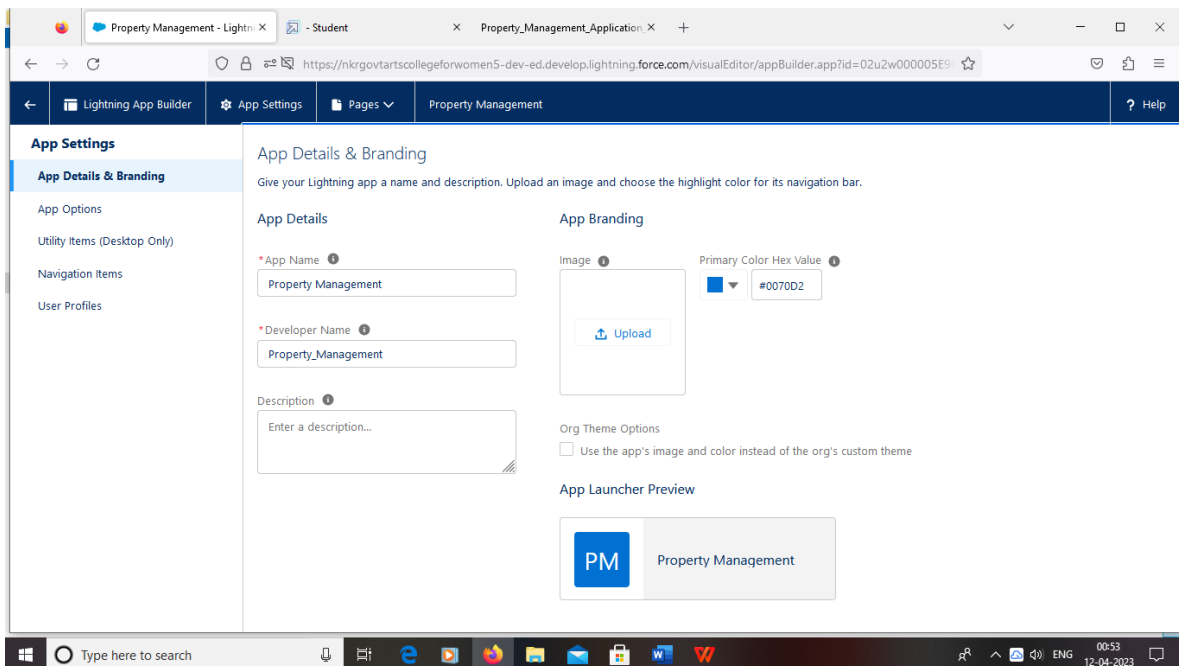
Tab:



We created four custom object tabs,

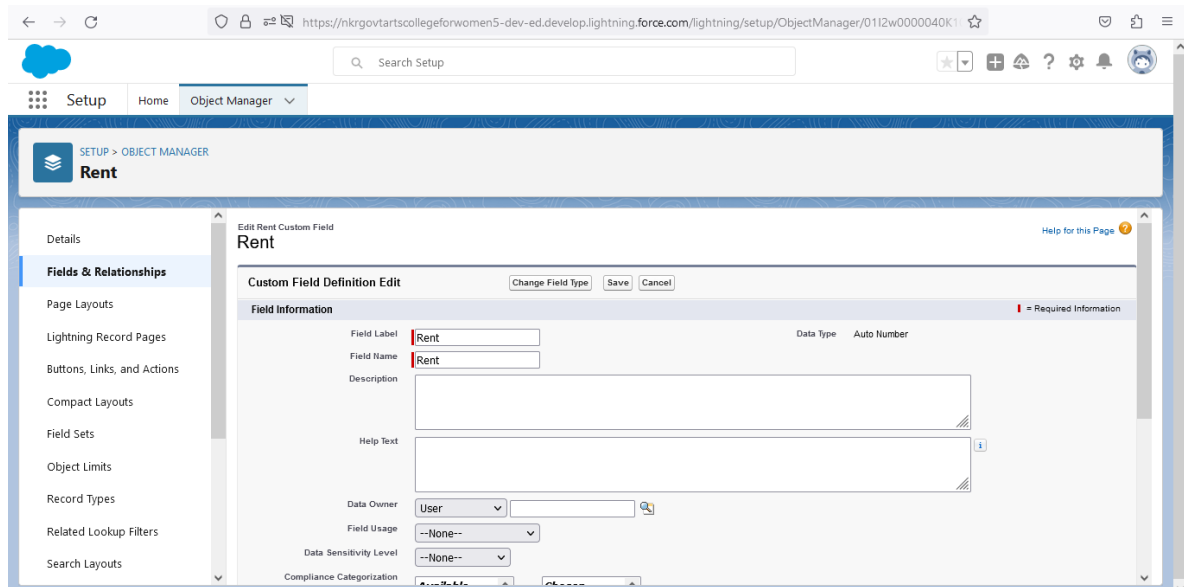
- Lead
- Buy
- Rent
- Loan

The Lightning App:



In the app manager we created new lightning app and named it “Property Management” and added navigation items (Lead, Buy, Rent, Loan) and added User profile (System Administrator, Salesforce Platform user, Standard user).

Field:

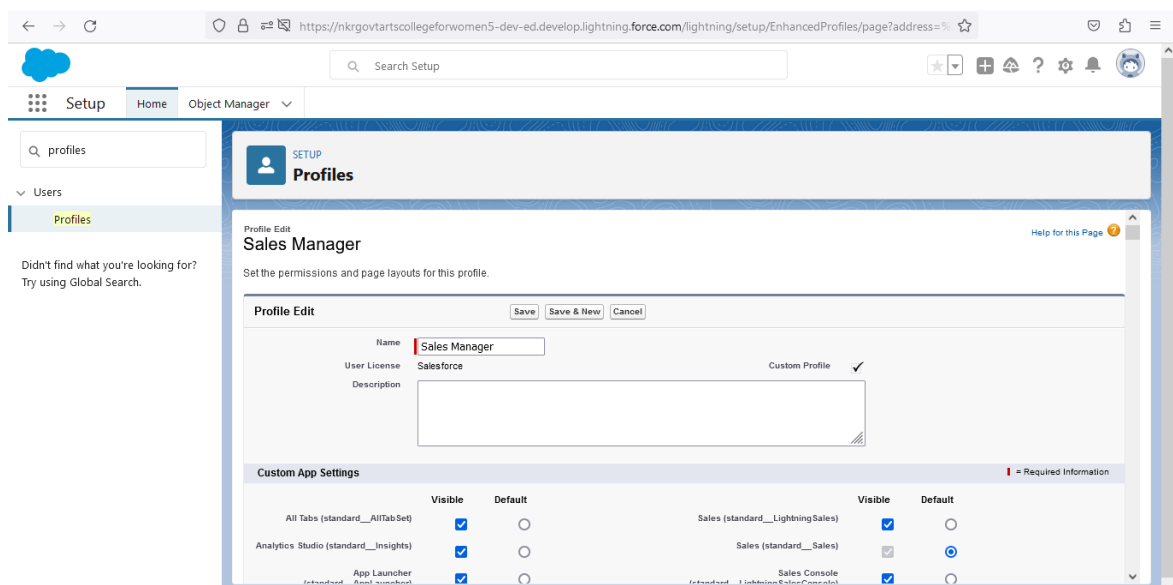


The screenshot shows the Salesforce Setup interface for editing a custom field named 'Rent' on the 'Rent' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Edit Rent Custom Field' and 'Rent'. It includes a 'Custom Field Definition Edit' section with buttons for 'Change Field Type', 'Save', and 'Cancel'. Below this is the 'Field Information' section with fields for Field Label, Field Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'Field Label' and 'Field Name' are both set to 'Rent'. The 'Data Type' is set to 'Auto Number'.

We created field and relationship for each object we customize

- Lead (State, City, Email, Phone)
- Buy (Property type, Discount, State, City, Annual amount)
- Rent (Rent, Rental city, BHK type)
- Loan (Loan Id, Interest Rate, Term, Annual Loan, Total Loan Instalments, Loan Repayment, Loan amount)

Profile:

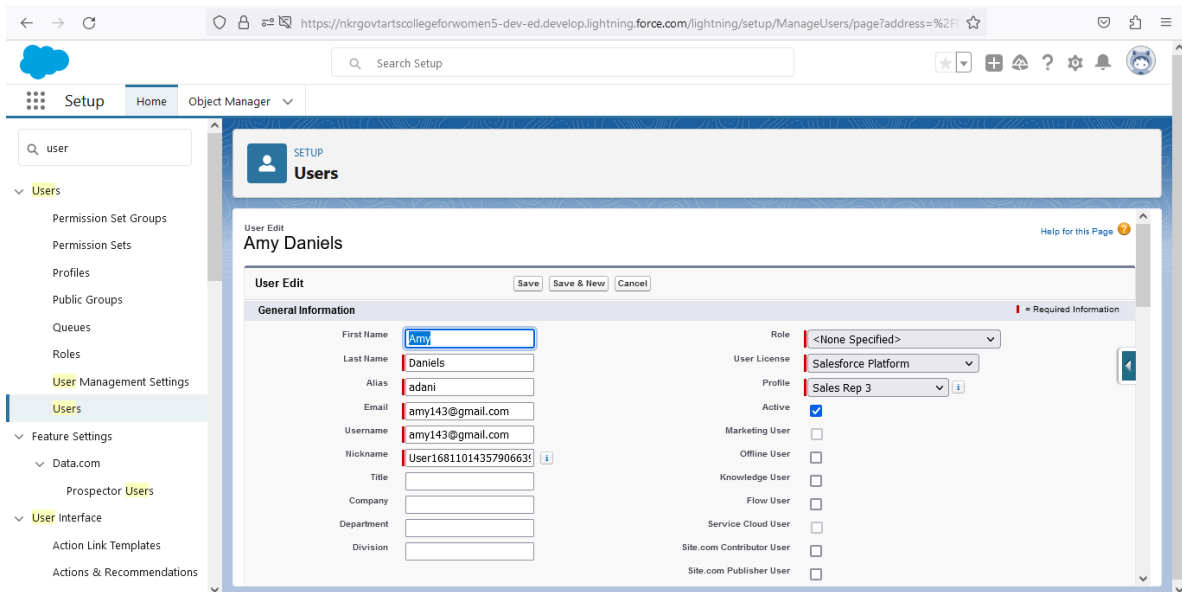


The screenshot shows the Salesforce Setup interface for editing a profile named 'Sales Manager'. The left sidebar contains navigation links: Profiles (selected), Users, and a search bar. The main content area is titled 'Profile Edit' and 'Sales Manager'. It includes a 'Profile Edit' section with buttons for 'Save', 'Save & New', and 'Cancel'. Below this is the 'Custom App Settings' section with a table of settings for various Salesforce applications.

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__SalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>

We created new profile for Sales Manager, Sales Rep, Marketing Executives and Marketing Manager.

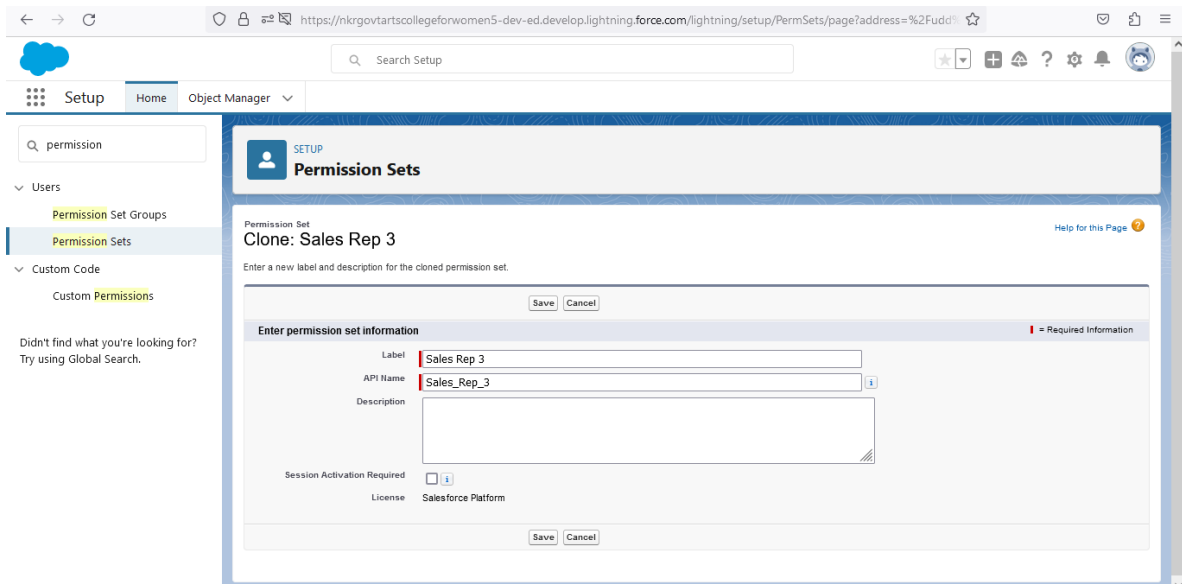
New User:



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a search bar with 'user' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (highlighted), Feature Settings, Data.com, Prospector Users, User Interface, Action Link Templates, and Actions & Recommendations. The main content area is titled 'Users' and shows the 'User Edit' form for 'Amy Daniels'. The form includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. It also has dropdowns for Role, User License, and Profile. The 'Active' checkbox is checked, and there are checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, and Site.com Publisher User. The 'Save' button is visible at the top right of the form.

We created a user Sales Rep3 – Amy Daniels.

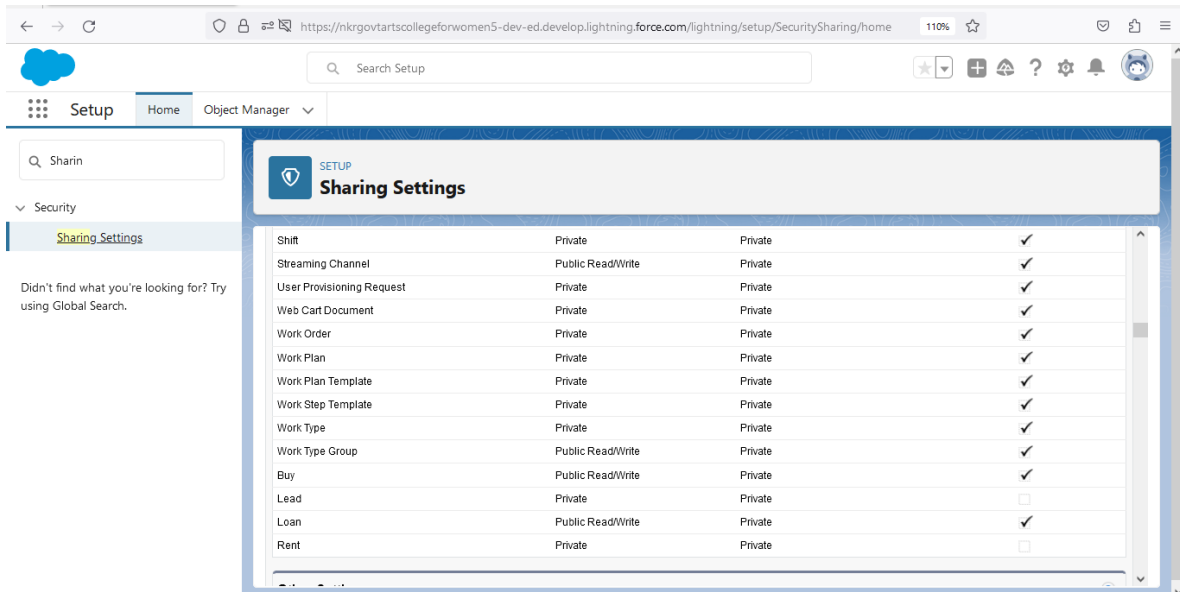
Permission Set:



The screenshot shows the Salesforce Setup interface for managing permission sets. The left sidebar contains a search bar with 'permission' and a list of navigation items: Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, Custom Permissions, and a message 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Permission Sets' and shows the 'Clone: Sales Rep 3' form. The form includes fields for Label, API Name, and Description. The 'Session Activation Required' checkbox is unchecked, and the 'License' dropdown is set to 'Salesforce Platform'. The 'Save' button is visible at the top right of the form.

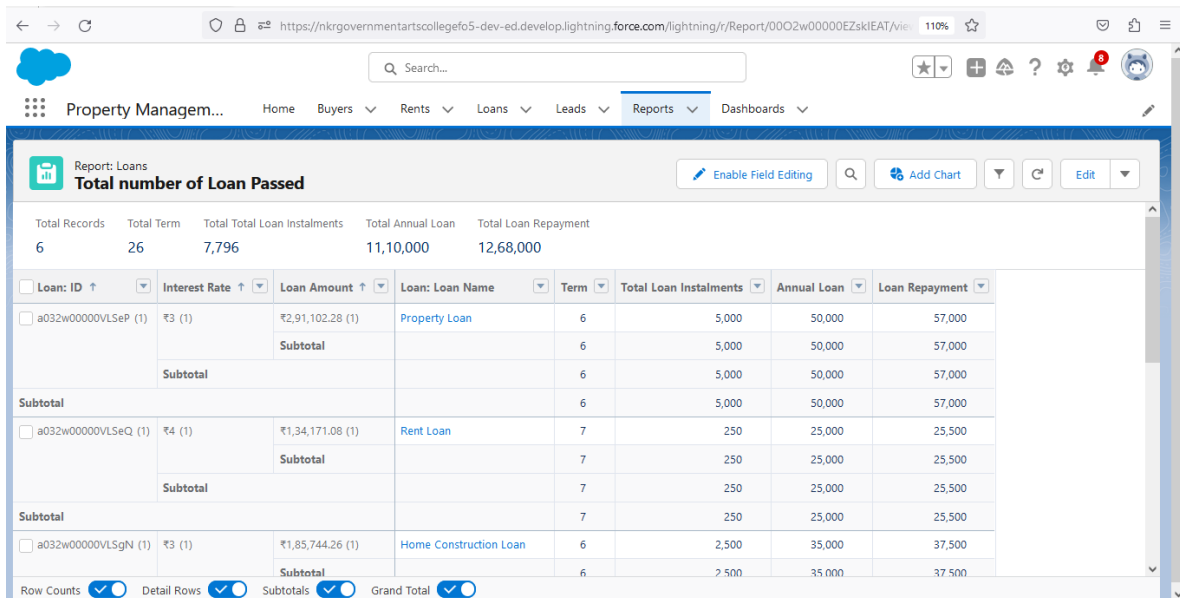
We added the access for Sales Rep3 and give access with create permission for the user.

Setup For OWD:



We disabled automatic access using your hierarchies, deselect grant access using hierarchies for Lead, Rent custom object and made the default internal and external access as private.

Report:

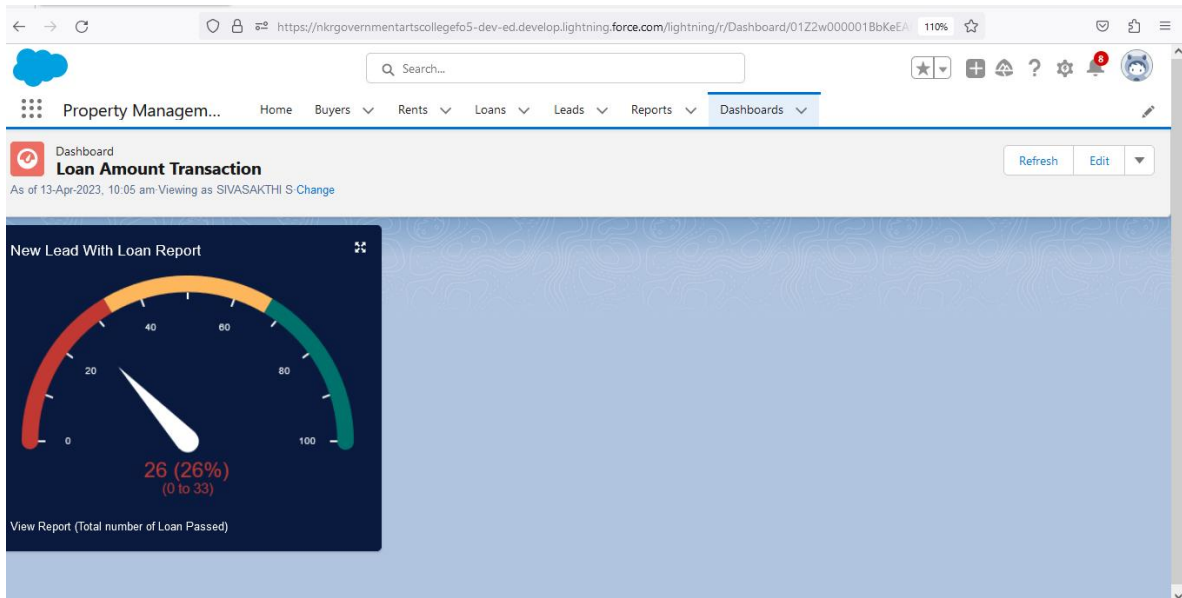


The screenshot shows the Salesforce Reports page for a user named 'Sharin'. The 'Reports' section is expanded, displaying a report titled 'Total number of Loan Passed'. The report shows a summary of loan data and a detailed table of loan records.

Loan: ID	Interest Rate	Loan Amount	Loan: Loan Name	Term	Total Loan Instalments	Annual Loan	Loan Repayment
a032w00000VLSeP (1)	₹3 (1)	₹2,91,102.28 (1)	Property Loan	6	5,000	50,000	57,000
		Subtotal		6	5,000	50,000	57,000
		Subtotal		6	5,000	50,000	57,000
		Subtotal		6	5,000	50,000	57,000
a032w00000VLSeQ (1)	₹4 (1)	₹1,34,171.08 (1)	Rent Loan	7	250	25,000	25,500
		Subtotal		7	250	25,000	25,500
		Subtotal		7	250	25,000	25,500
		Subtotal		7	250	25,000	25,500
a032w00000VLSgN (1)	₹3 (1)	₹1,85,744.26 (1)	Home Construction Loan	6	2,500	35,000	37,500
		Subtotal		6	2,500	35,000	37,500
		Subtotal		6	2,500	35,000	37,500
		Subtotal		6	2,500	35,000	37,500

We created the report of the Total Number of Loan Passed for getting the amount for the property.

Dashboards:



We created the dashboard for Loan Amount Transaction.

4. Trailhead Profile Public URL

Team Lead

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

Team Member 1 -

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

Team Member 2 -

<https://trailblazer.me/id/abinaya23022003>

Team Member 3 -

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

Project Report Template

5. **ADVANTAGES**

- Our Application will show all the needed information and categories the information depending on the customer's need.
- The system which helps customer to save time and money.

6. **DISADVANTAGES**

- Time –Consuming if you choose the wrong statement.
- Might seem expensive for a small business.

7. **APPLICATIONS**

- This system give the complete package of details about the properties to the customer.
- The system which helps customer buy and to maintain customer properties securely.
- The property management helps the customer to get loan facilities easily.

8. **CONCLUSION**

- In this Project we have created a CRM for property management under salesforce platform. First we create the four objects Buy, Rent, Loan and Lead under the objects we create the fields, Enter the required datas and finally derive the reports and dashboards of the Project.

9. **FUTURE SCOPE**

- The future Scope of the project would save the time for applicants and providing more options for every Budget and Requirements.