

Date	
Team ID	NM2023TMID20373
Project Name	PROPERTY MANAGEMENT APPLICATION USING SALESFORCE
Team Leader	RANJANI .R
Team Member	RAJARAJESHWARI .S
	RAJALAKSHMI .K
	RAJAKUMARI .R

1 INTRODUCTION

1.1 Overview

Our project aims to improve the functioning for an existing recruitment app for the property management application using salesforce. We achieve this goal by creating custom salesforce object, tab, application, fields, profile, users, permission sets, setup for OWD, report, dashboard that provide easy access to the relevant data.

Property management is the process of develop an app for the property management where buyers can order his requirements and get the appropriate details of the property.

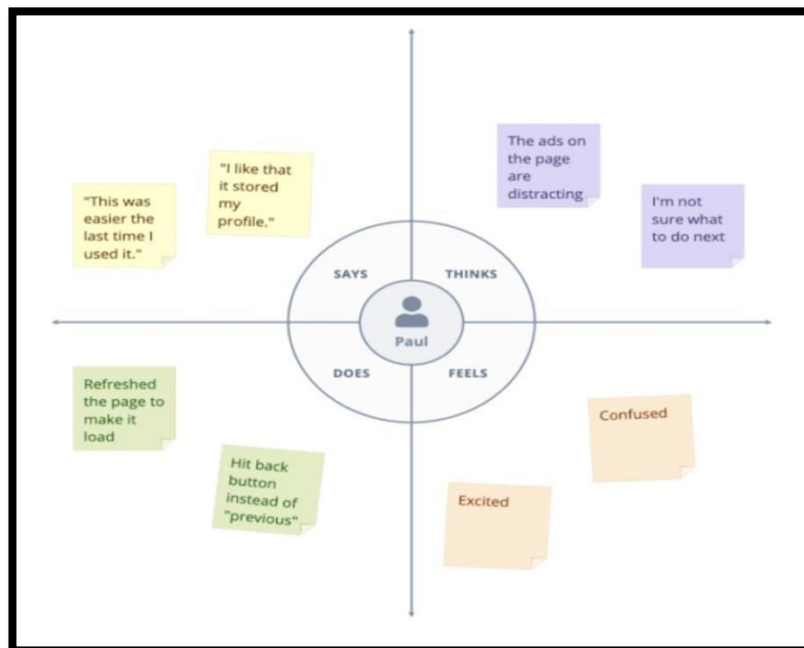
At the start, according to buyers interest salesforce admin provide him with some discounts upto what extent he can get the discount. Also track whether he is interested in taking the loan available for so just calculate how much loan Amount user can get. Provide the security for two team. Then finally create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the details.

1.2 Purpose

A Property management application using salesforce enables the realty managers to keep track of crucial data about financial & household properties incorporating associated cash flow, primary tenants, and occupancy rates.

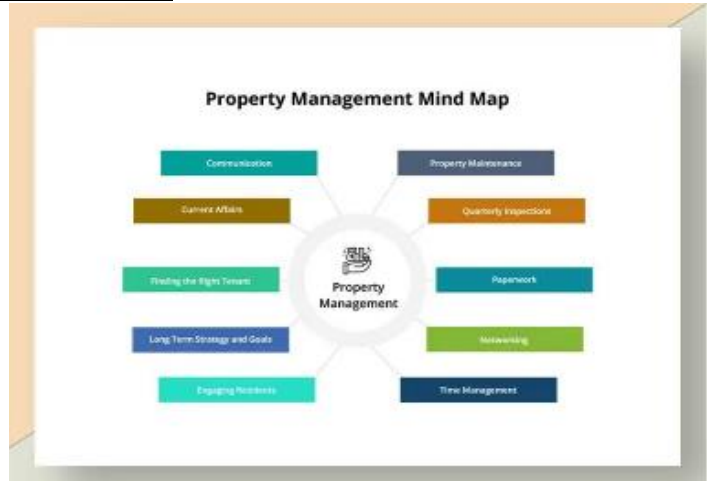
2 PROBLEM DEFINITION & DESING THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map

BRAINSTORM



GROUP IDEAS



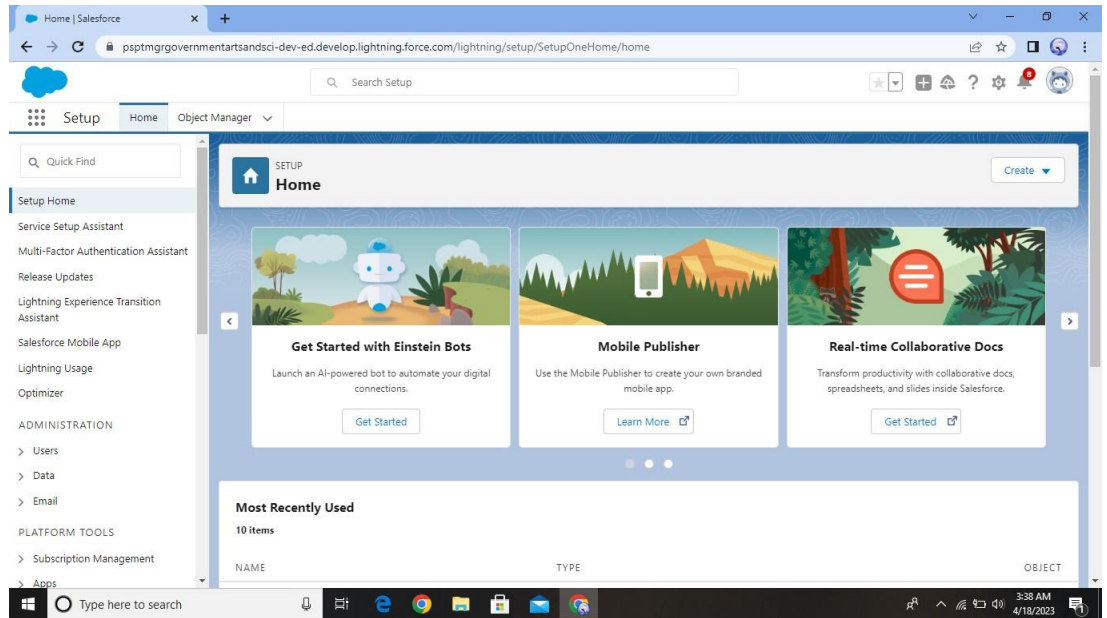
3 RESULT

3.1 Data Model

Object Name	Fields in the Object	
	Field Label	Date Type
Lead	State	Picklist
	City	Picklist
	E-mail	email
	Phone	Phone
Buy	Create Property Type	Picklist
	discount	Percentage
	State	Picklist
	City	Gujarat
Rent	Rental City	Maharastra
	BHK type	Picklist
Loan	Loan Id	Auto number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total Loan Instalments	Number
	Loan Repayments	Number
	Loan Amount	Formula

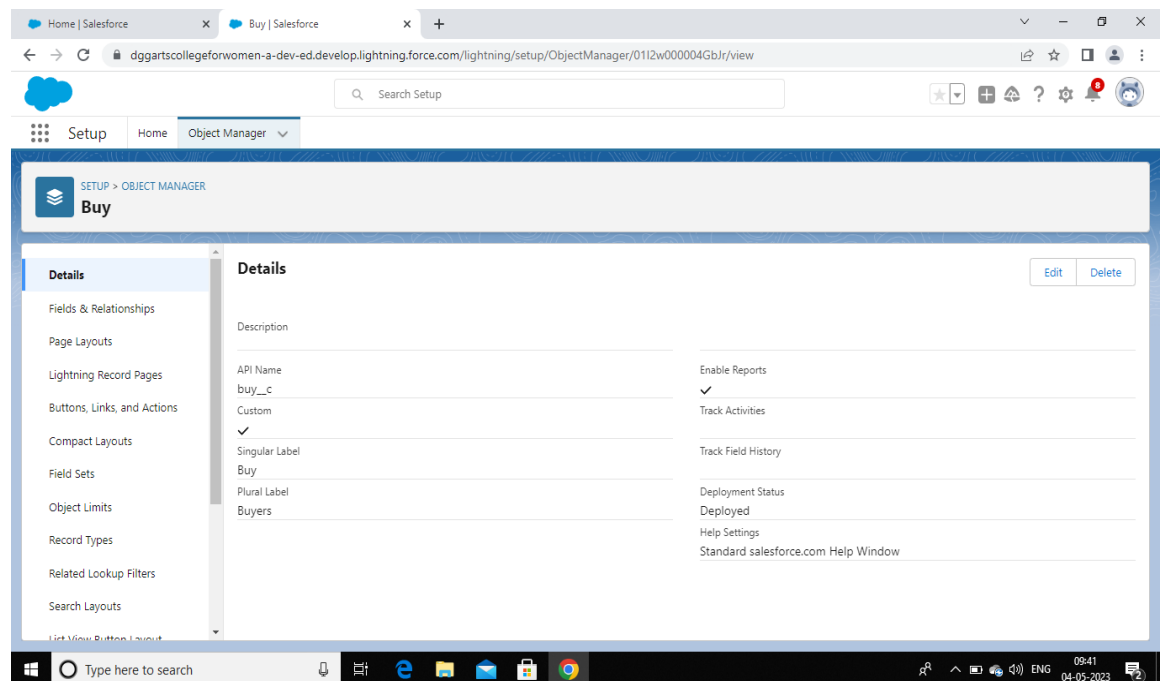
3.2 Activity & Screenshot

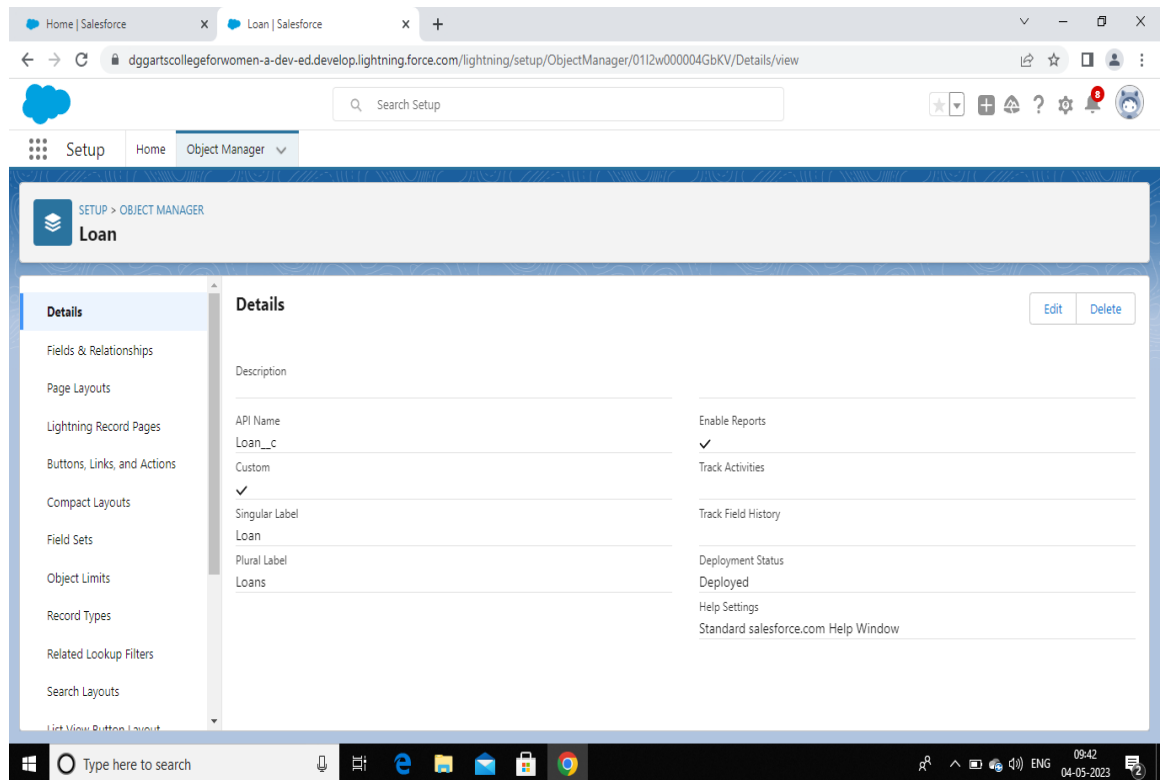
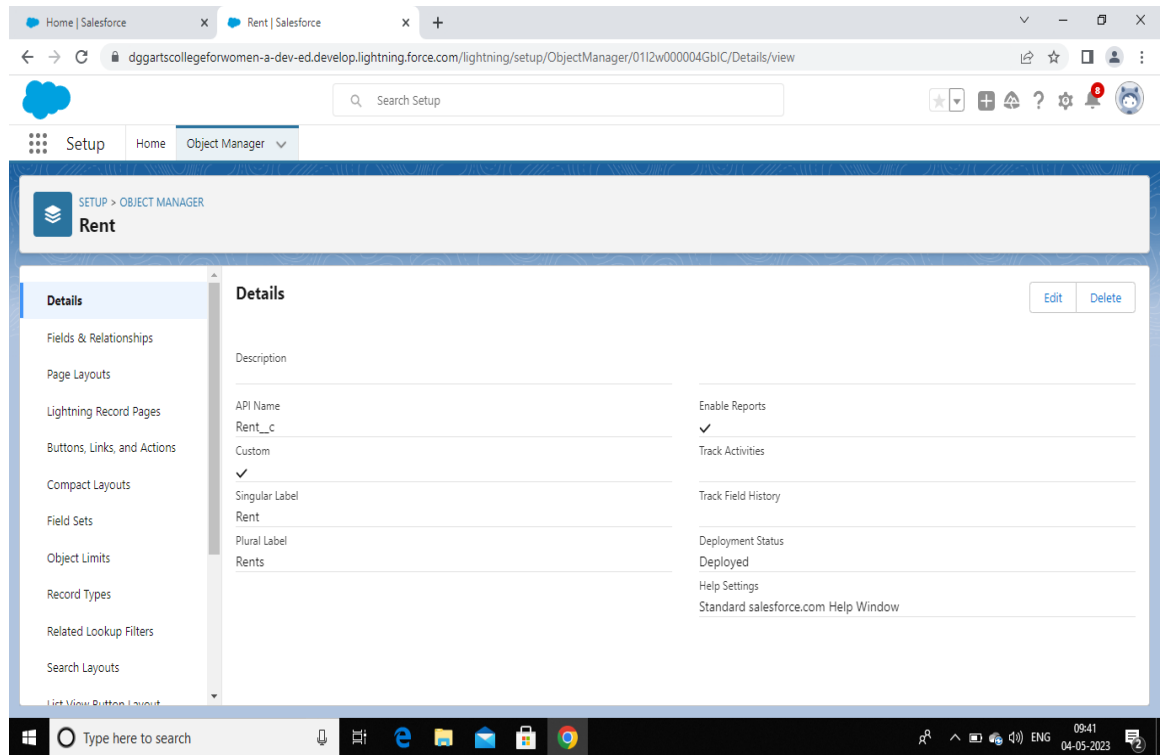
Milestone 1:



Creation of Salesforce Account

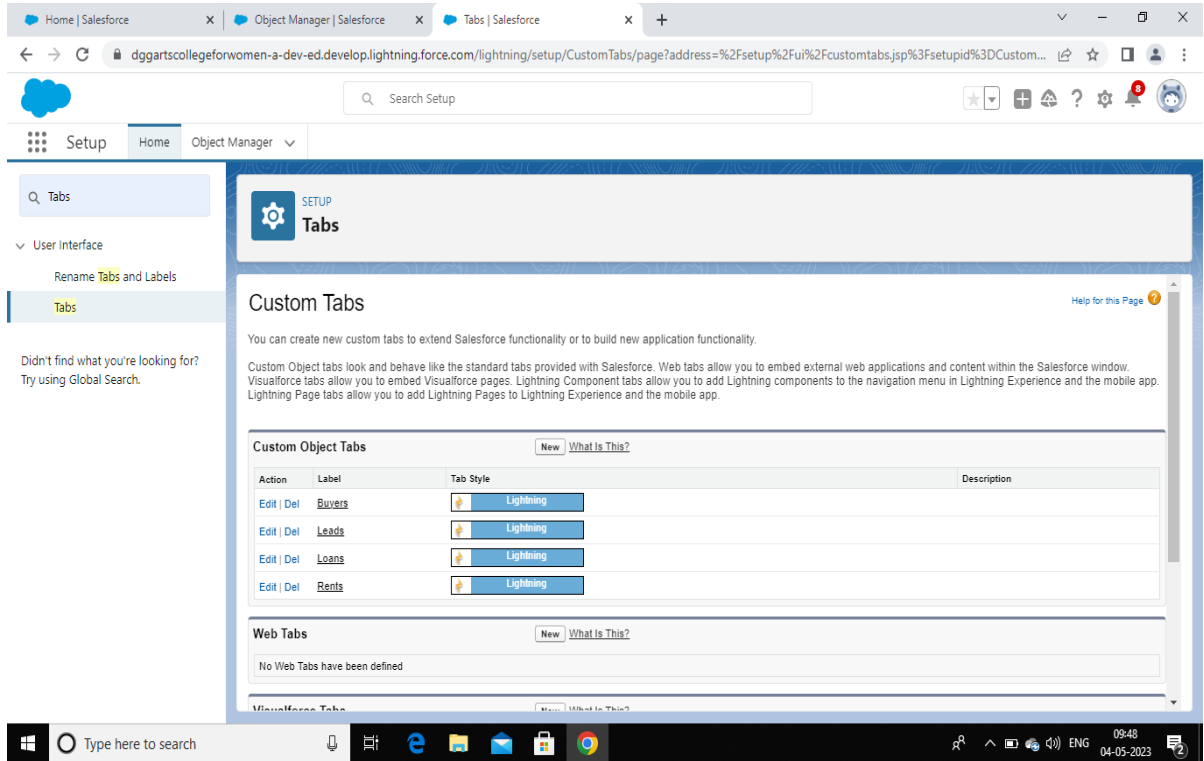
Milestone 2:





Creation of objects (Buy, Rent, Loan)

Milestone 3:



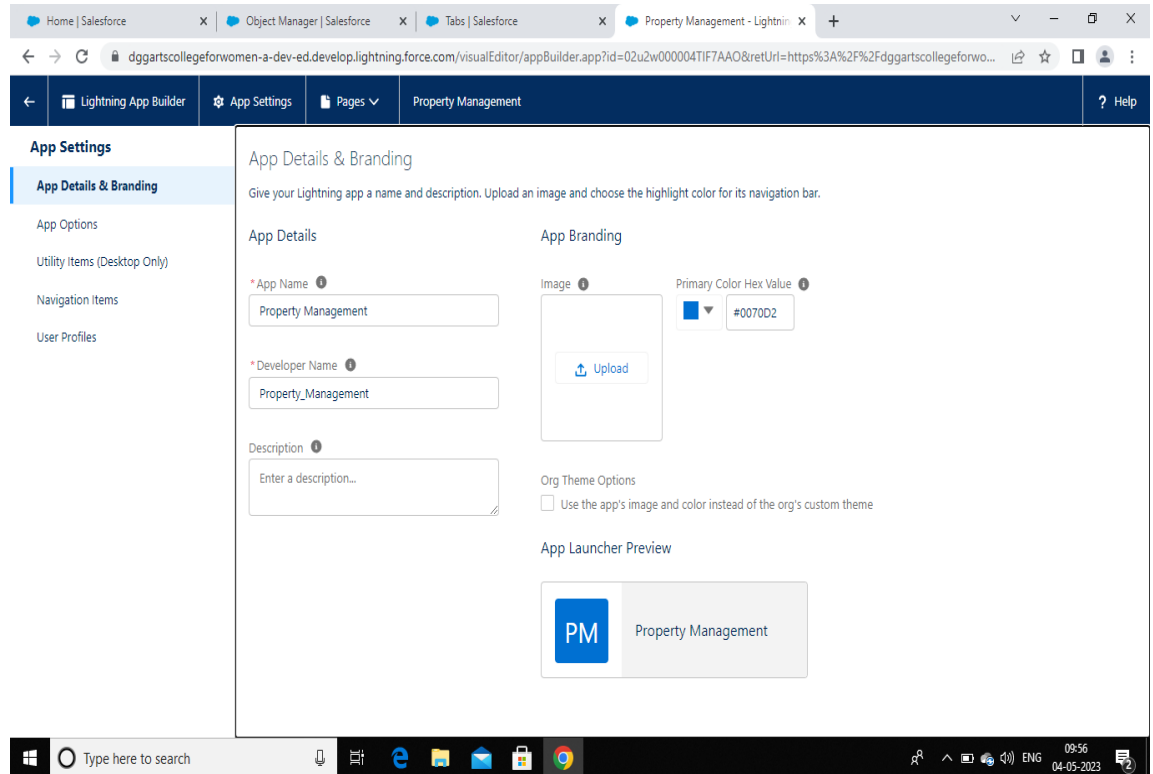
The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar includes a search bar and a navigation menu with 'User Interface' expanded, showing 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is an introductory text and a table of Custom Object Tabs.

Action	Label	Tab Style	Description
Edit Del	Buys	Lightning	
Edit Del	Leads	Lightning	
Edit Del	Loans	Lightning	
Edit Del	Rents	Lightning	

Below the table, there is a section for 'Web Tabs' which states 'No Web Tabs have been defined'.

Creation of a Tab (Lead, Buy, Rent, Loan)

Milestone 4:



Creation of the Lightning App

Milestone 5:

WhatsApp | Loan | Salesforce | Lead | Salesforce

dggartcollegeforwomen-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Gfqa/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Lead

Details

Fields & Relationships
9 Items. Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Auto Number		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Lead	Lead__c	Text(30)		
Lead Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User.Group)		✓
Phone	Phone__c	Phone		
state	state__c	Picklist		

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Type here to search

10:57
04-05-2023

WhatsApp | Loan | Salesforce | Buy | Salesforce

dggartcollegeforwomen-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004GbJr/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Buy

Details

Fields & Relationships
9 Items. Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy	Buy__c	Auto Number		
buy Name	Name	Text(80)		✓
city	city__c	URL(255)		
Create Property Type	Create_Property_Type__c	Auto Number		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
state	state__c	Picklist		

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Type here to search

10:58
04-05-2023

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WhatsApp | Loan | Salesforce | Rent | Salesforce

dggartcollegeforwomen-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000004GbIC/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Rent

Details

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	Checkbox		

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Type here to search

10:58 04-05-2023

WhatsApp | Loan | Salesforce | Loan | Salesforce

dggartcollegeforwomen-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000004GbKV/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Loan

Details

Fields & Relationships

12 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan	Loan__c	Auto Number		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan Name	Name	Text(80)		✓
Loan Repayment	Loan_Repayment__c	Number(18, 0)		
Loan Id	Loan_Id__c	Auto Number		
Owner	OwnerId	Lookup(User Group)		✓
Term	Term__c	Number(18, 0)		
Total Loan Installments	Total_Loan_Installments__c	Number(18, 0)		

build an event p...docx | build an event pdf.docx | build an event pdf.pdf | Show all

Type here to search

10:59 04-05-2023

Creation of the Field (Lead, Buy, Rent, Loan)

Milestone 6:

The screenshot shows the Salesforce Setup interface for the 'Standard User' profile. The left sidebar contains a search bar with 'profi' and a list of items under 'Users', including 'Profiles'. The main content area is titled 'Profiles' and shows the 'Standard User' profile details. The profile is associated with the 'Salesforce' user license and was created by 'RAJARAJESHWARI SAMINATHAN' on 28/03/2023. The 'Page Layouts' section shows the 'Global' layout assigned to the 'Standard Object Layouts'.

Profile Detail

Name	Standard User
User License	Salesforce
Created By	RAJARAJESHWARI SAMINATHAN, 28/03/2023, 12:36 pm
Modified By	RAJARAJESHWARI SAMINATHAN, 04/05/2023, 10:49 am

Page Layouts

Standard Object Layouts	Global	Object Milestone	Operating Hours
	Global Layout [View Assignment]	Object Milestone Layout [View Assignment]	Operating Hours Layout [View Assignment]

The screenshot shows the Salesforce Setup interface for the 'sales Manager' profile. The left sidebar contains a search bar with 'profi' and a list of items under 'Users', including 'Profiles'. The main content area is titled 'Profiles' and shows the 'sales Manager' profile details. The profile is associated with the 'Salesforce' user license and was created by 'RAJARAJESHWARI SAMINATHAN' on 12/04/2023. The 'Page Layouts' section shows the 'Global' layout assigned to the 'Standard Object Layouts'.

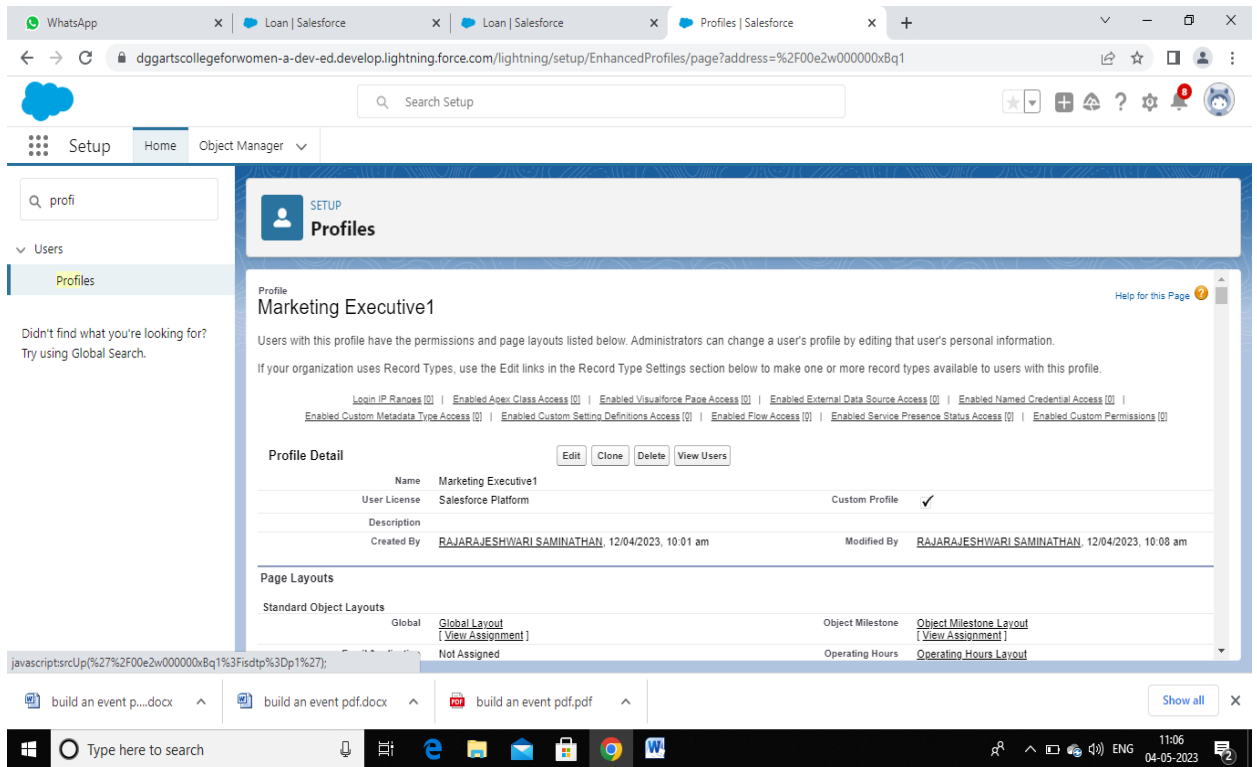
Profile Detail

Name	sales Manager
User License	Salesforce
Description	
Created By	RAJARAJESHWARI SAMINATHAN, 12/04/2023, 9:58 am
Modified By	RAJARAJESHWARI SAMINATHAN, 12/04/2023, 10:15 am

Page Layouts

Standard Object Layouts	Global	Object Milestone	Operating Hours
	Global Layout [View Assignment]	Object Milestone Layout [View Assignment]	Operating Hours Layout [View Assignment]

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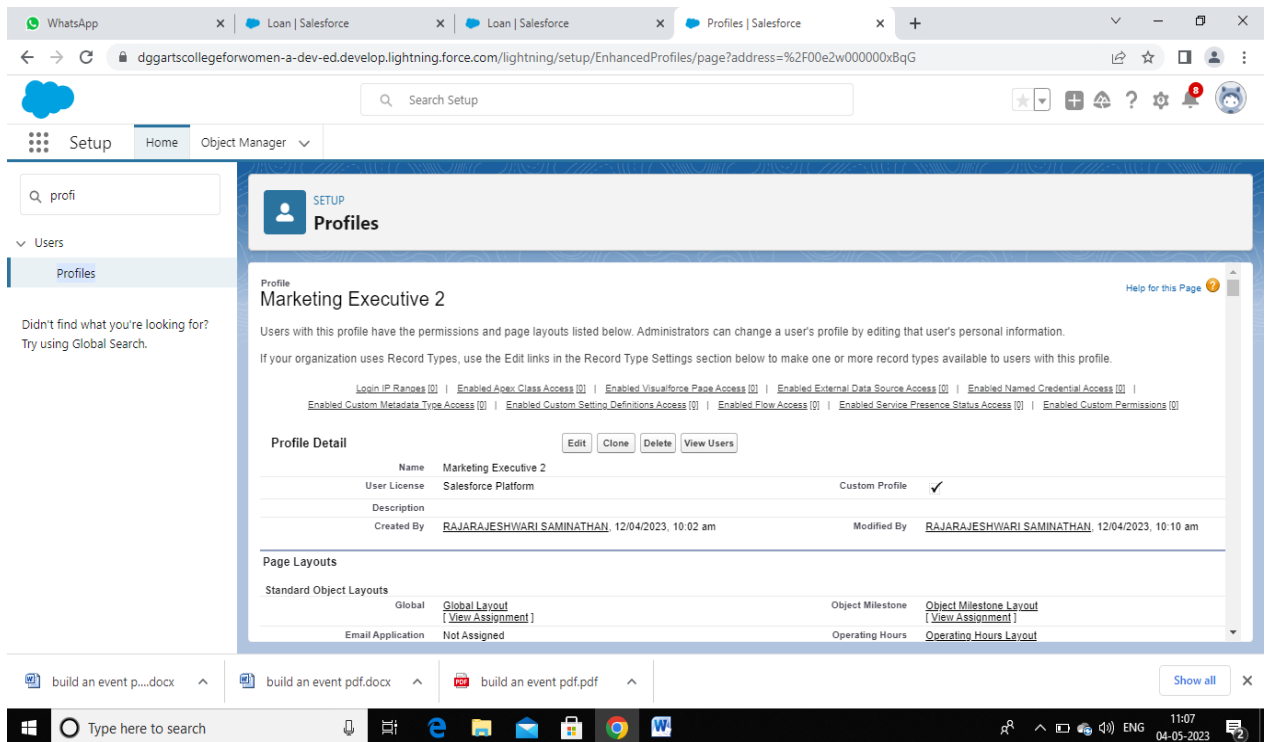
The screenshot shows the Salesforce Setup interface for the 'Marketing Executive1' profile. The left sidebar contains a search bar with 'profi' and a list of users. The main content area displays the profile details, including the name 'Marketing Executive1', user license 'Salesforce Platform', and a table of permissions. The 'Page Layouts' section shows the 'Global Layout' assigned to the profile.

Profile Detail

Name	Marketing Executive1
User License	Salesforce Platform
Description	
Created By	RAJARAJESHWARI SAMINATHAN, 12/04/2023, 10:01 am
Modified By	RAJARAJESHWARI SAMINATHAN, 12/04/2023, 10:08 am

Page Layouts

Standard Object Layouts	Global	Object Milestone	Operating Hours
	Global Layout (View Assignment)	Object Milestone Layout (View Assignment)	Operating Hours Layout
	Not Assigned		



The screenshot shows the Salesforce Setup interface for the 'Marketing Executive 2' profile. The left sidebar contains a search bar with 'profi' and a list of users. The main content area displays the profile details, including the name 'Marketing Executive 2', user license 'Salesforce Platform', and a table of permissions. The 'Page Layouts' section shows the 'Global Layout' assigned to the profile.

Profile Detail

Name	Marketing Executive 2
User License	Salesforce Platform
Description	
Created By	RAJARAJESHWARI SAMINATHAN, 12/04/2023, 10:02 am
Modified By	RAJARAJESHWARI SAMINATHAN, 12/04/2023, 10:10 am

Page Layouts

Standard Object Layouts	Global	Object Milestone	Operating Hours
	Global Layout (View Assignment)	Object Milestone Layout (View Assignment)	Operating Hours Layout
Email Application	Not Assigned		

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The screenshot shows the Salesforce Setup interface for the 'Marketing Manager' profile. The left sidebar contains a search bar with 'profi' and a list of users. The main content area displays the profile details, including the name 'Marketing Manager', user license 'Salesforce Platform', and a table of permissions. The 'Page Layouts' section shows the 'Global Layout' assigned to the profile.

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

Name	Marketing Manager
User License	Salesforce Platform
Description	
Created By	RAJARAJESHWARI SAMINATHAN 12/04/2023, 10:04 am
Modified By	RAJARAJESHWARI SAMINATHAN 12/04/2023, 10:11 am

Page Layouts

Standard Object Layouts	Object Milestone	Operating Hours
Global	Object Milestone Layout	Operating Hours Layout

The screenshot shows the Salesforce Setup interface for the 'Marketing' profile. The left sidebar contains a search bar with 'profi' and a list of users. The main content area displays the profile details, including the name 'Marketing', user license 'Salesforce', and a table of permissions. The 'Page Layouts' section shows the 'Global Layout' assigned to the profile.

Profile: Marketing

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](#)

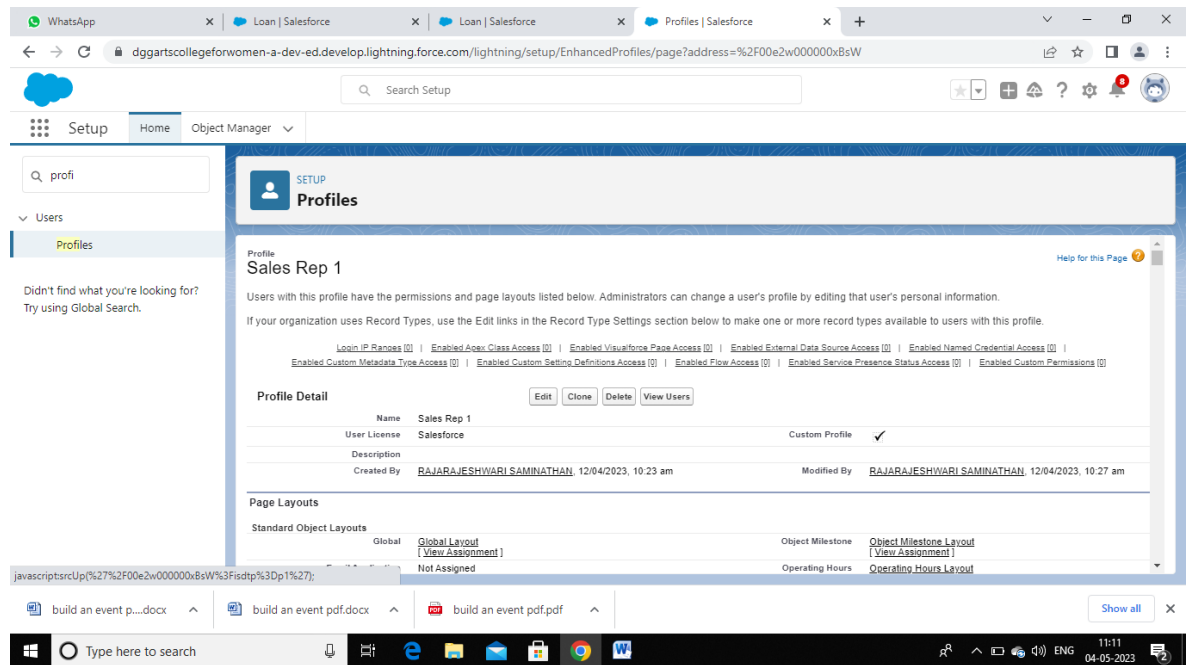
Profile Detail

Name	Marketing
User License	Salesforce
Description	
Created By	RAJARAJESHWARI SAMINATHAN 11/04/2023, 2:44 pm
Modified By	RAJARAJESHWARI SAMINATHAN 11/04/2023, 2:44 pm

Page Layouts

Standard Object Layouts	Object Milestone	Operating Hours
Global	Object Milestone Layout	Operating Hours Layout

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The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profi' and a list of items including 'Users' and 'Profiles'. The main content area displays the 'Sales Rep 1' profile. It includes a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. Below this is a 'Page Layouts' section with a table of Standard Object Layouts. The browser's address bar shows the URL: 'dggartcollegeforwomen-a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000x8sW'. The taskbar at the bottom shows the Windows search bar and several open applications.

Setup

Profiles

Profile: Sales Rep 1

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.

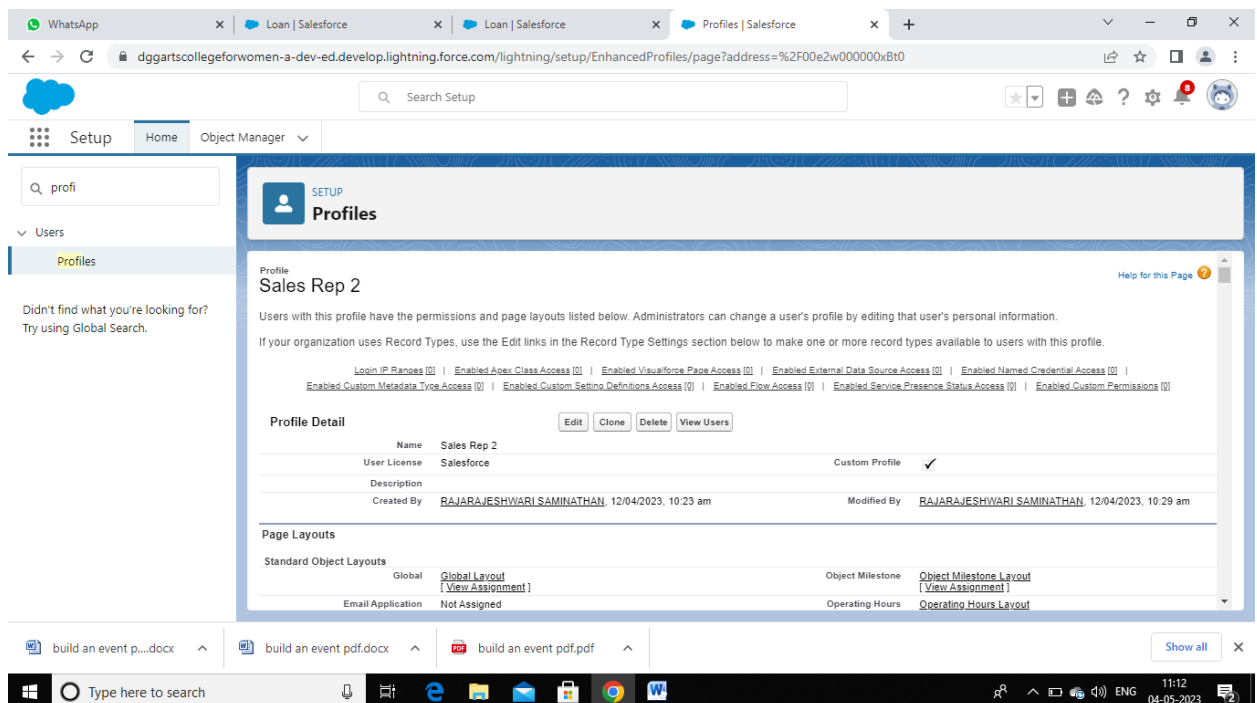
Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Name	Sales Rep 1	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	RAJARAJESHWARI SAMINATHAN	Modified By	RAJARAJESHWARI SAMINATHAN
Created Date	12/04/2023, 10:23 am	Modified Date	12/04/2023, 10:27 am

Page Layouts

Standard Object Layouts	Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
		Not Assigned	Operating Hours	Operating Hours Layout



The screenshot shows the Salesforce Setup interface for the 'Profiles' section, specifically for 'Sales Rep 2'. The layout is similar to the previous one, but the profile name and some details are updated. The 'Profile Detail' section shows 'Sales Rep 2' as the name and 'Salesforce' as the user license. The 'Page Layouts' section shows the same standard object layouts as the previous profile. The browser's address bar shows the URL: 'dggartcollegeforwomen-a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000x8t0'. The taskbar at the bottom shows the Windows search bar and several open applications.

Setup

Profiles

Profile: Sales Rep 2

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 [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Name	Sales Rep 2	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	RAJARAJESHWARI SAMINATHAN	Modified By	RAJARAJESHWARI SAMINATHAN
Created Date	12/04/2023, 10:23 am	Modified Date	12/04/2023, 10:29 am

Page Layouts

Standard Object Layouts	Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
		Not Assigned	Operating Hours	Operating Hours Layout

[illegible]

CREATION OF THE NEW USER

Milestone 8:

The screenshot displays the Salesforce Setup interface for a Permission Set named 'permission'. The browser tabs include WhatsApp, Loan | Salesforce, Home | Salesforce, and Permission Sets | Salesforce. The URL is dggartscollegeforwomen-a-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w00000AAZ9H. The left sidebar shows the Setup menu with 'Permission Sets' selected. The main content area shows the 'permission' Permission Set details, including a search bar, 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. The 'Permission Set Overview' section displays the following information:

Field	Value
Description	permission
License	Namespace Prefix
Session Activation Required	<input type="checkbox"/>
Created By	RAJARAJESHWARI SAMINATHAN, 12/04/2023, 10:42 am
Last Modified By	RAJARAJESHWARI SAMINATHAN, 12/04/2023, 10:42 am

The 'Apps' section is currently empty. Below it, there are links for 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'.

Assigned Apps
Settings that specify which apps are visible in the app menu

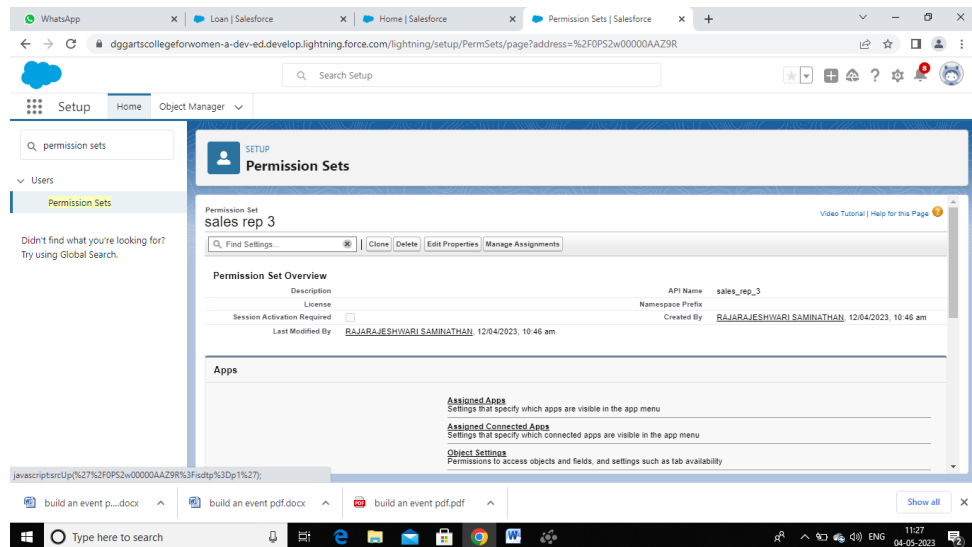
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

The Windows taskbar at the bottom shows the search bar, task view button, and several application icons (Edge, File Explorer, Mail, Calendar, Chrome, Word). The system clock indicates 11:26 on 04-05-2023.

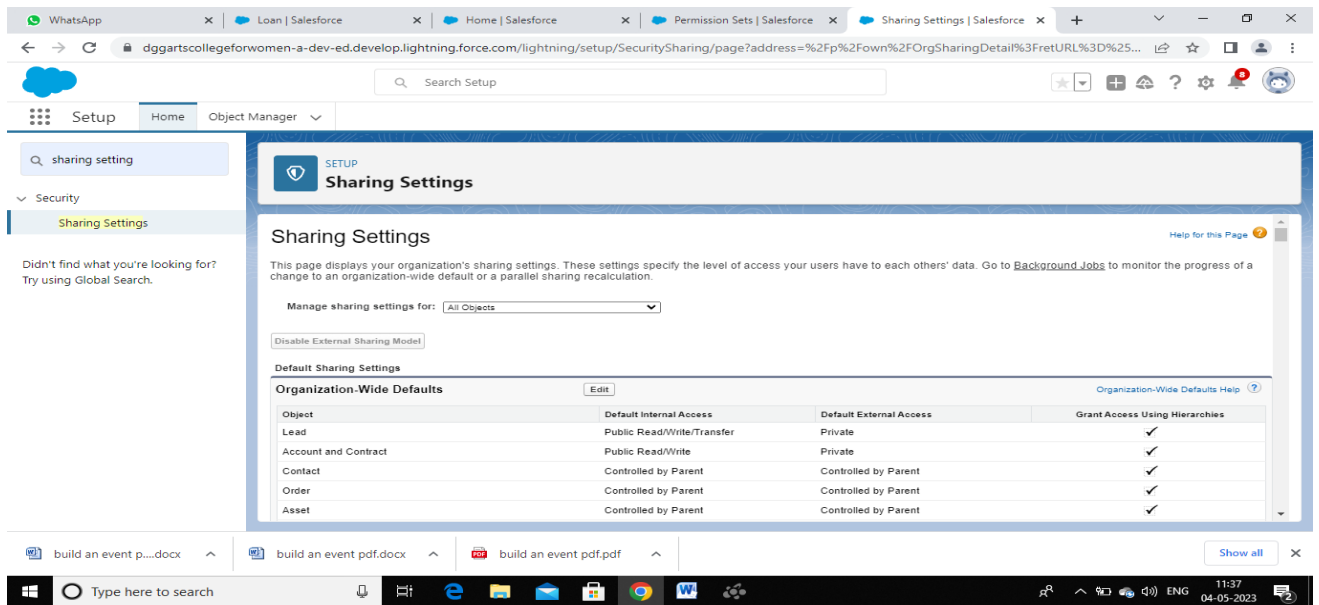
Creation of the permission set

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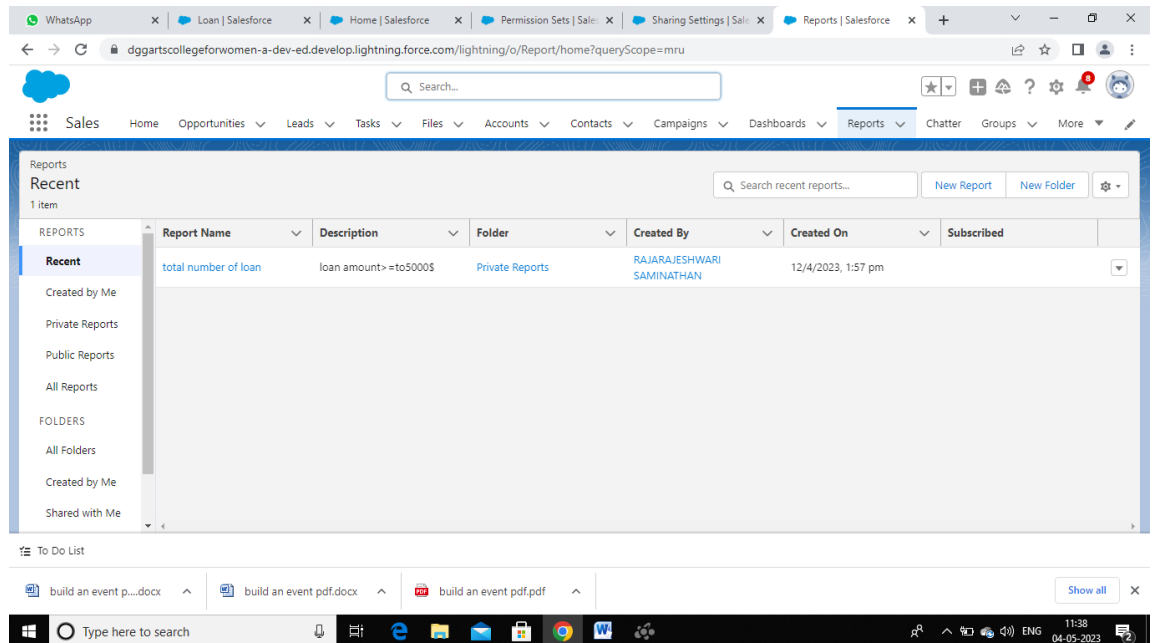
Creation of the permission set

Milestone 9:



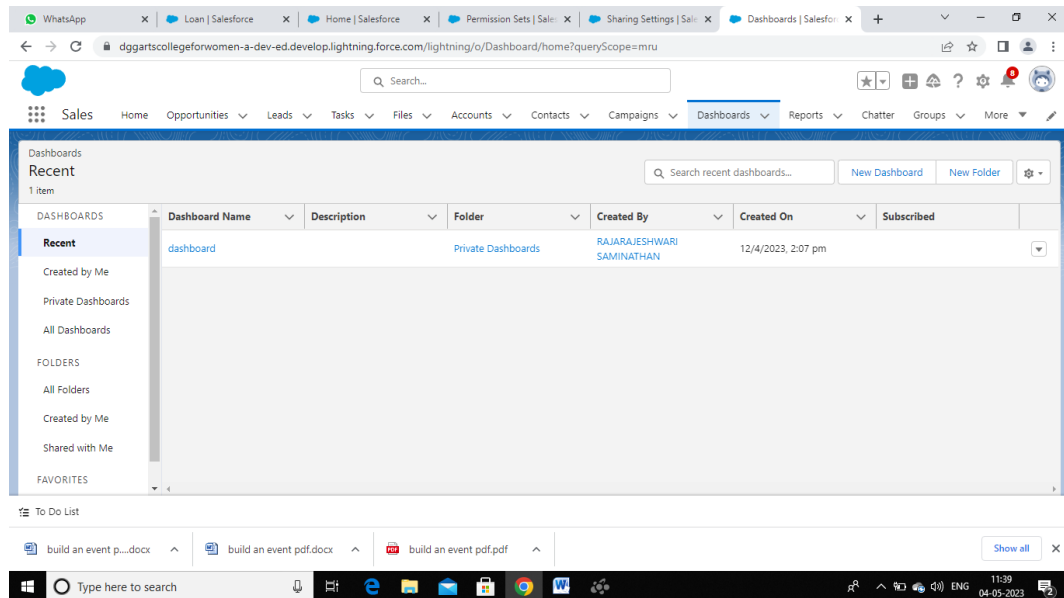
Create OWD setting

Milestone 10:



Create a report

Milestone 11:



Create a dashboard

4 TRAILHEAD PROFILE PUBLIC URL

Team Lead - <https://trailblazer.me/id/rramadoss3>

Team Member 1 - <https://trailblazer.me/id/rsaminathan5>

Team Member 2 - <https://trailblazer.me/id/rajak95>

Team Member 3 - <https://trailblazer.me/id/rajar192>

5 ADVANTAGES

- ❖ Saves time.
- ❖ Minimize the administration costs.
- ❖ Saves money.
- ❖ Notifications and alert feature.

6 DISADVANTAGES

- ❖ This is expansive.
- ❖ The learning curve never seems to end.
- ❖ Customers support has a poor reputation.

7 APPLICATION

- ❖ Best property management CRM on Top of salesforce.
- ❖ BREal real Asset management CRM.
- ❖ Rethink real Estate Administration CRM.

8 CONCLUSION

- ❖ To enhance efficiency of the app

9 FUTURE SCOPE

In the 21st century each and every field is computerized and all works are done by using the modern technologies so it has a good future.