

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.

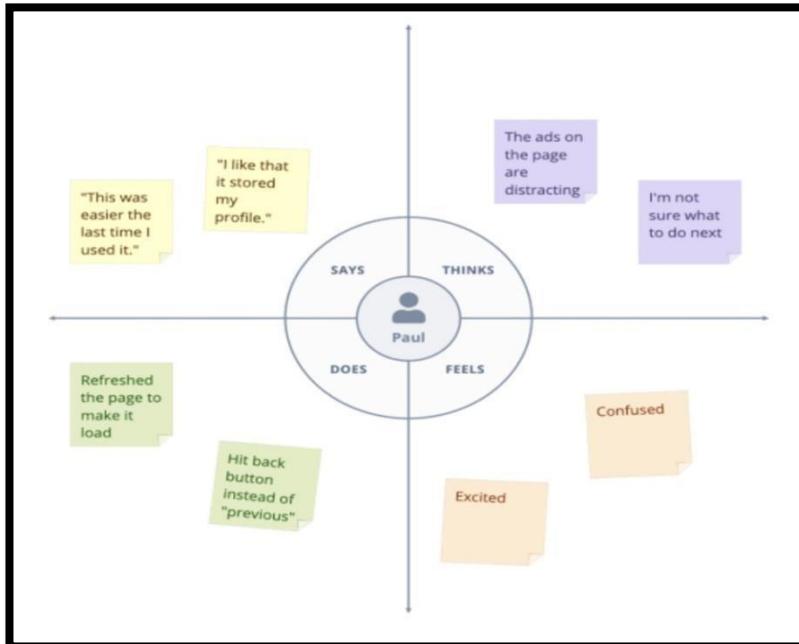
At the start, according to buyers interest salesforce admin provide him with some discounts upto what extent he can get the discount. Also track whether he is interested in taking the loan available for so just calculate how much loan Amount user can get. Provide the security for two team. Then finally 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.

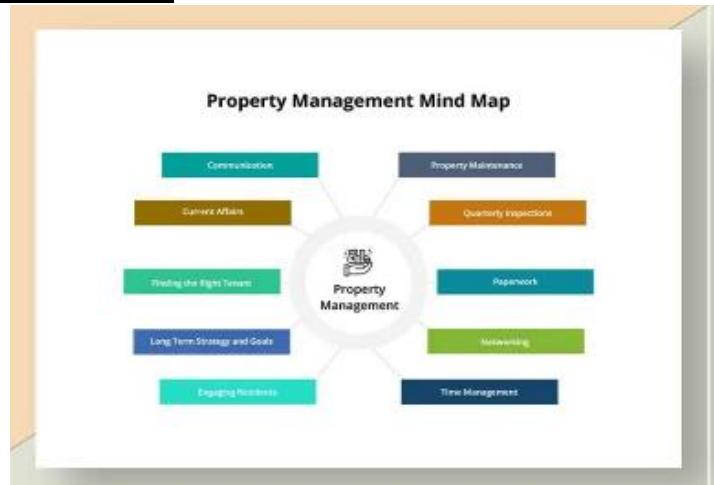
2 PROBLEM DEFINITION & DESING THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map

BRAINSTORM



GROUP IDEAS



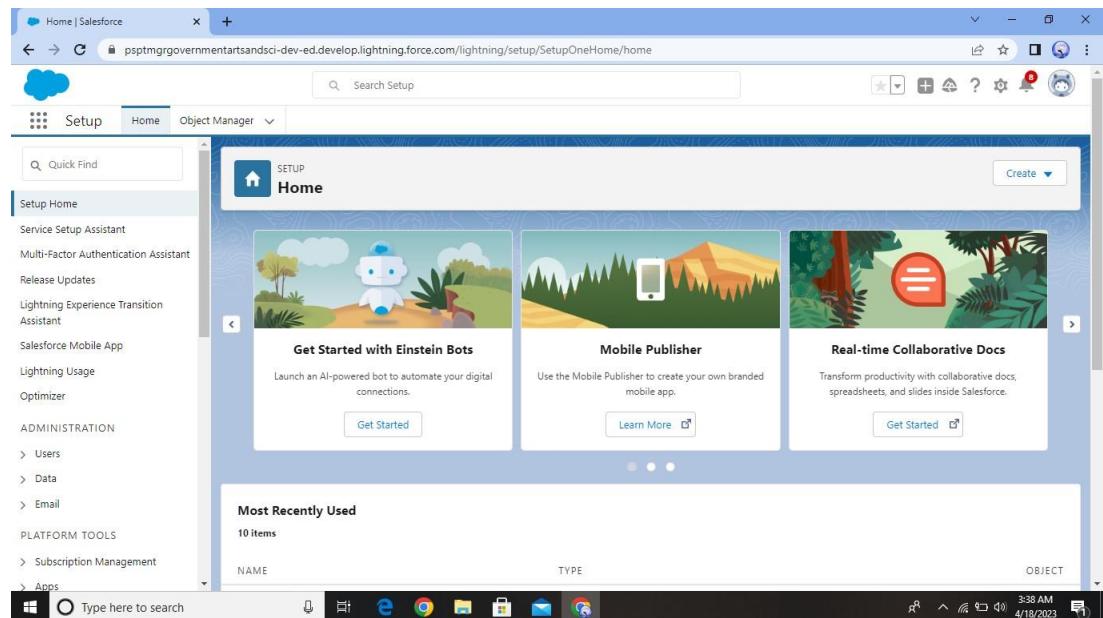
3 RESULT

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

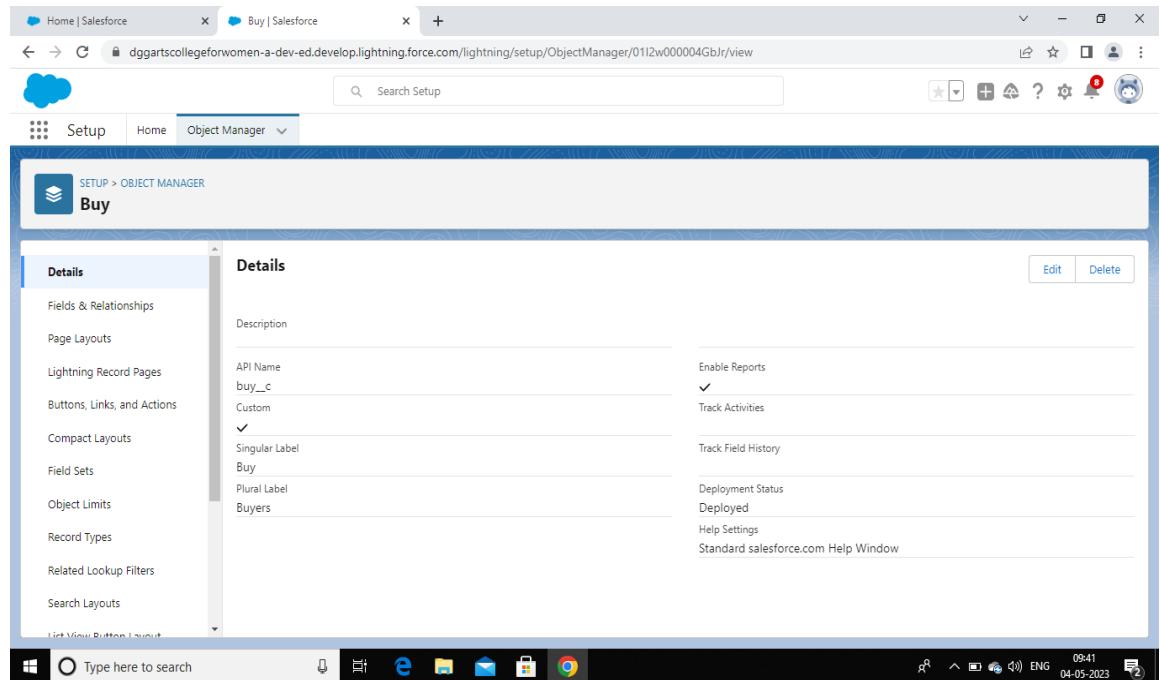
3.2 Activity & Screenshot

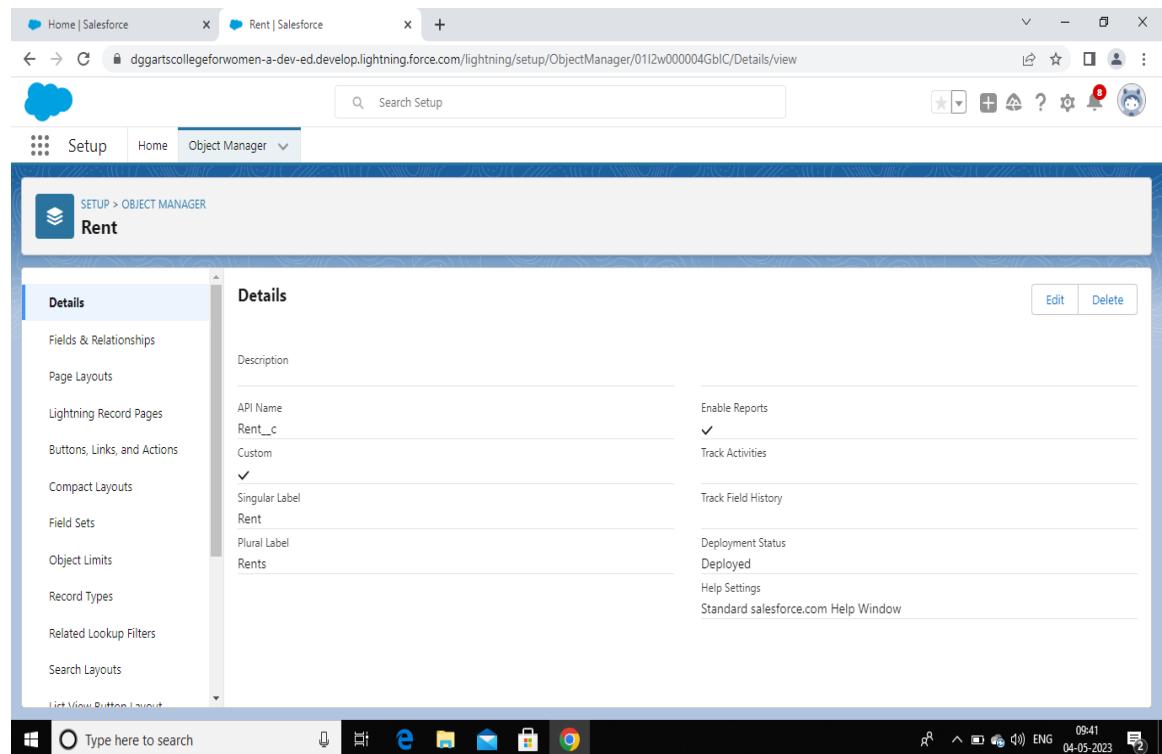
Milestone 1:



Creation of Salesforce Account

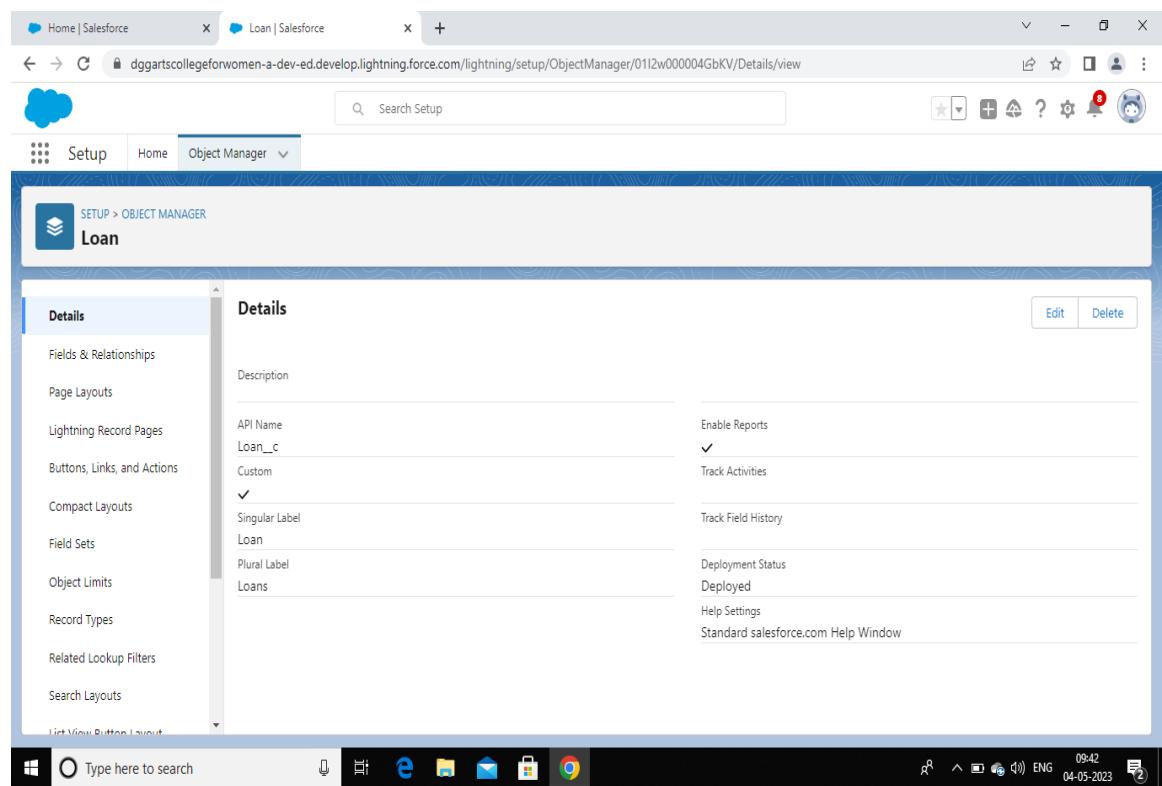
Milestone 2:





The screenshot shows the Salesforce Setup interface for the 'Object Manager' under the 'Rent' object. The left sidebar lists various configuration options: Details, Fields & Relationships, 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 'Details' tab is selected, showing the following configuration:

- Description:** (empty)
- API Name:** Rent_c
- Custom:** ✓
- Singular Label:** Rent
- Plural Label:** Rents
- Enable Reports:** ✓
- Track Activities:** (unchecked)
- Track Field History:** (unchecked)
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

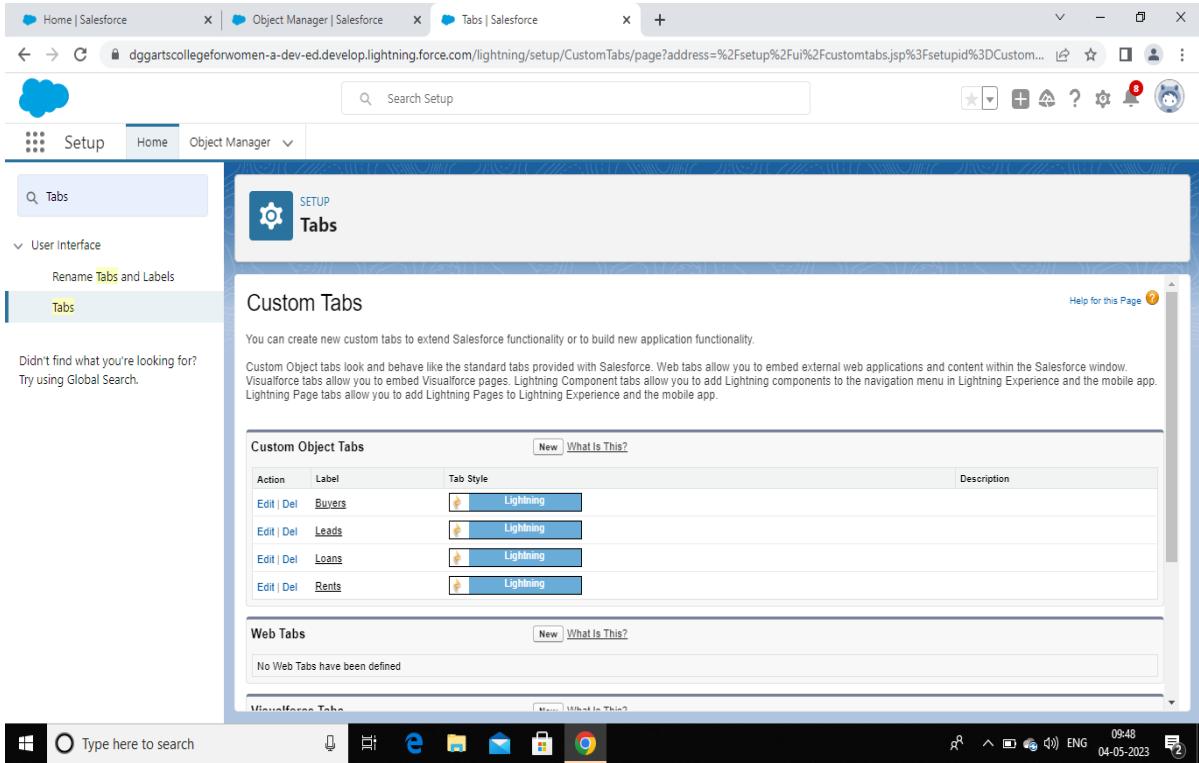


The screenshot shows the Salesforce Setup interface for the 'Object Manager' under the 'Loan' object. The left sidebar lists the same configuration options as the Rent object. The main 'Details' tab is selected, showing the following configuration:

- Description:** (empty)
- API Name:** Loan_c
- Custom:** ✓
- Singular Label:** Loan
- Plural Label:** Loans
- Enable Reports:** ✓
- Track Activities:** (unchecked)
- Track Field History:** (unchecked)
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Creation of objects (Buy, Rent, Loan)

Milestone 3:



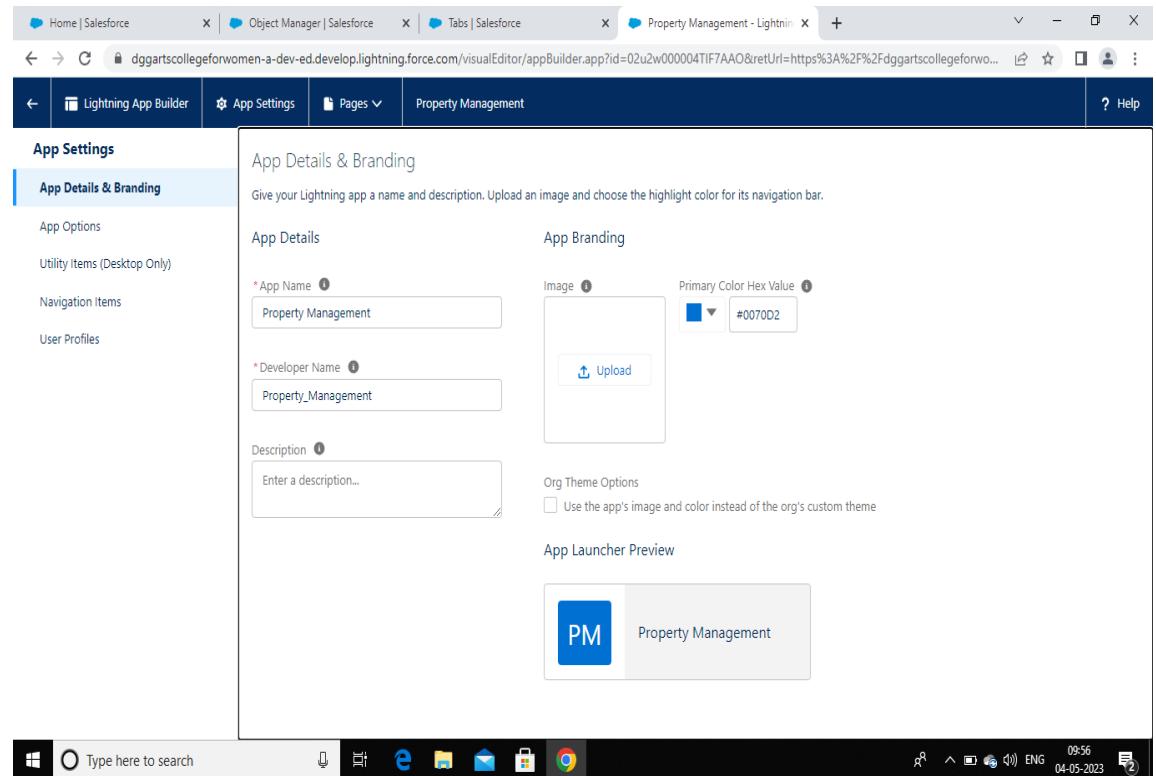
The screenshot shows the Salesforce Setup interface for creating Custom Tabs. The left sidebar is collapsed, and the main content area displays the "Custom Tabs" page under the "User Interface" section. The "Custom Object Tabs" section lists four tabs: Buyers, Leads, Loans, and Rents, all styled as Lightning tabs.

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

The "Web Tabs" section below shows a message: "No Web Tabs have been defined".

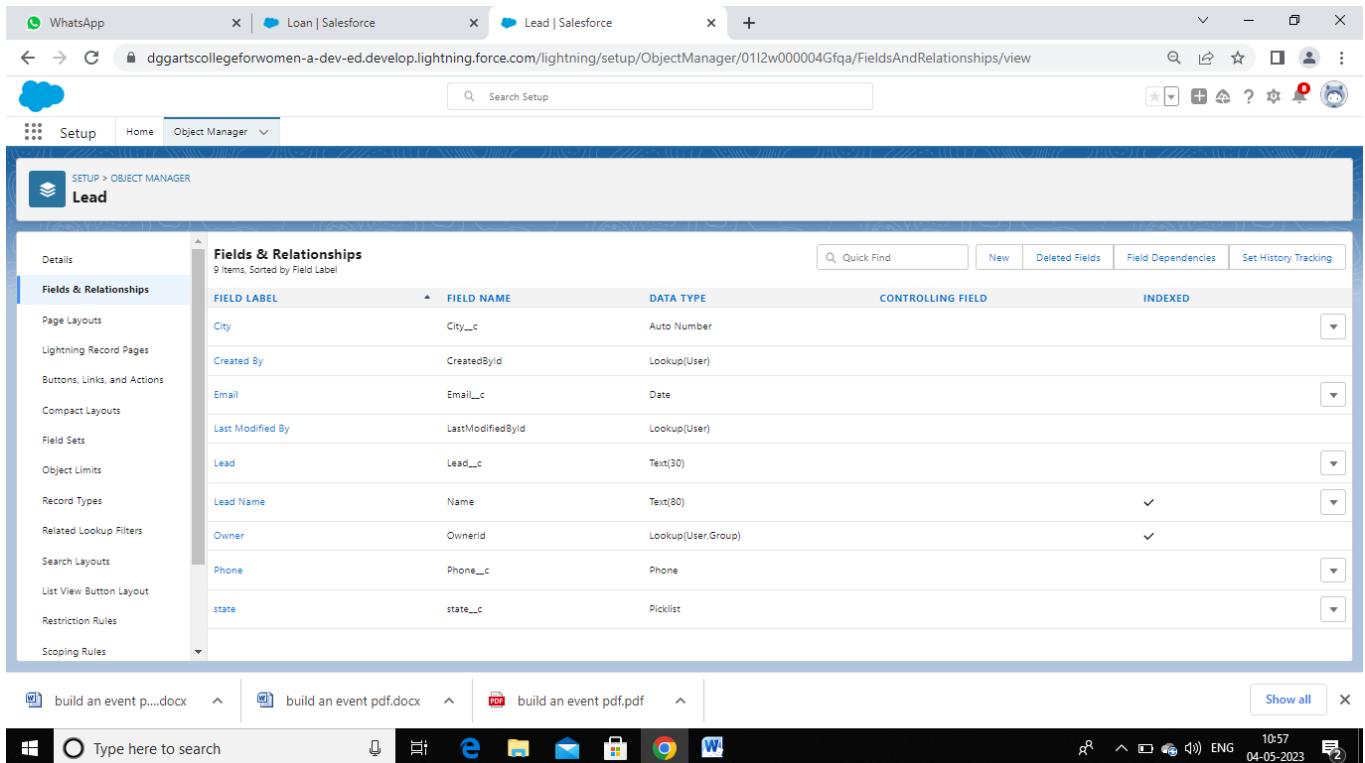
Creation of a Tab (Lead, Buy, Rent, Loan)

Milestone 4:



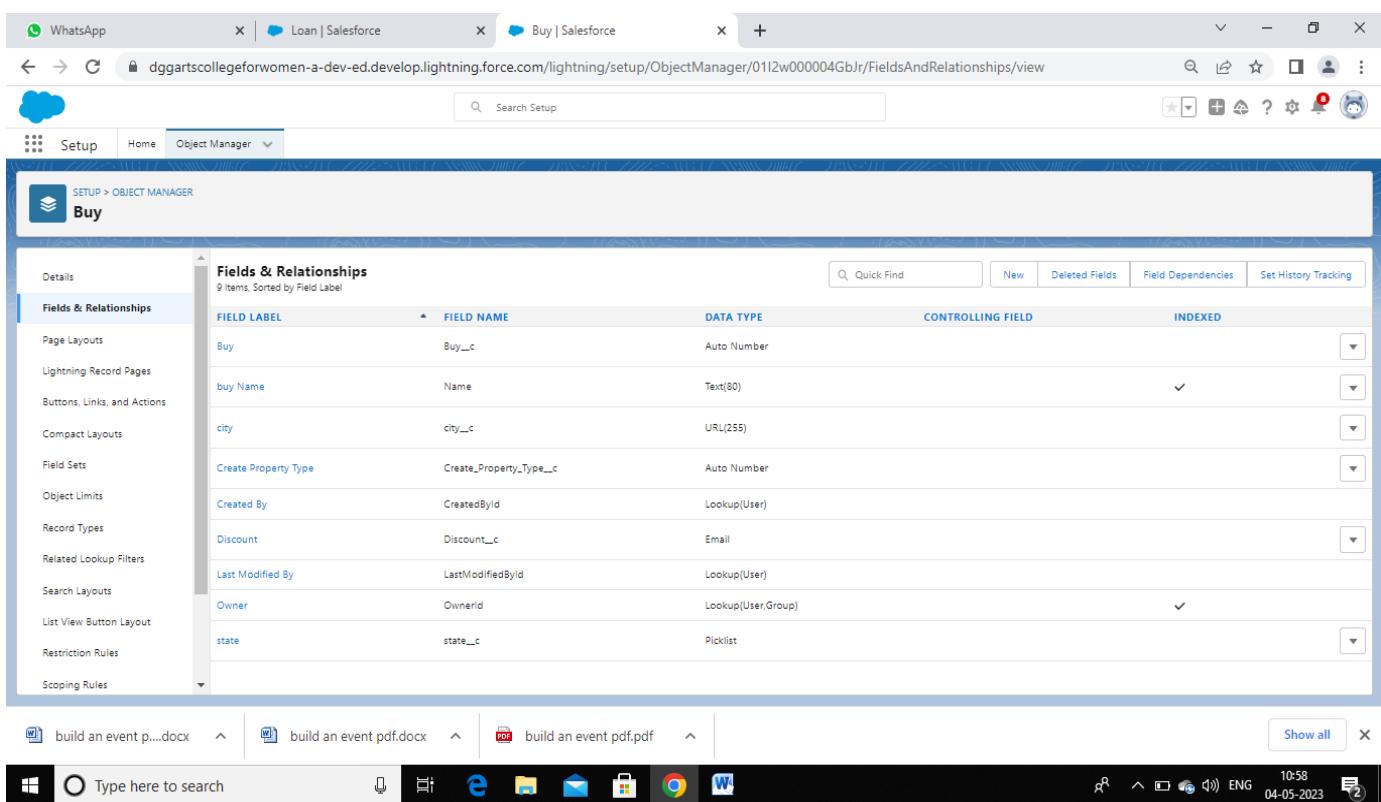
Creation of the Lightning App

Milestone 5:



The screenshot shows the Salesforce Setup interface for the Lead object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area displays a table of fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Key fields shown include City, Created By, Email, Last Modified By, Lead, Lead Name, Owner, Phone, and state.

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		



The screenshot shows the Salesforce Setup interface for the Buy object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area displays a table of fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Key fields shown include Buy, buy Name, city, Create Property Type, Created By, Discount, Last Modified By, Owner, and state.

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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Screenshot of the Salesforce Setup interface showing the Object Manager for the 'Rent' object.

Fields & Relationships section details:

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		

Left sidebar navigation includes: 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, and Scoping Rules.

Screenshot of the Salesforce Setup interface showing the Object Manager for the 'Loan' object.

Fields & Relationships section details:

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 Instalments	Total_Loan_Installments__c	Number(18, 0)		

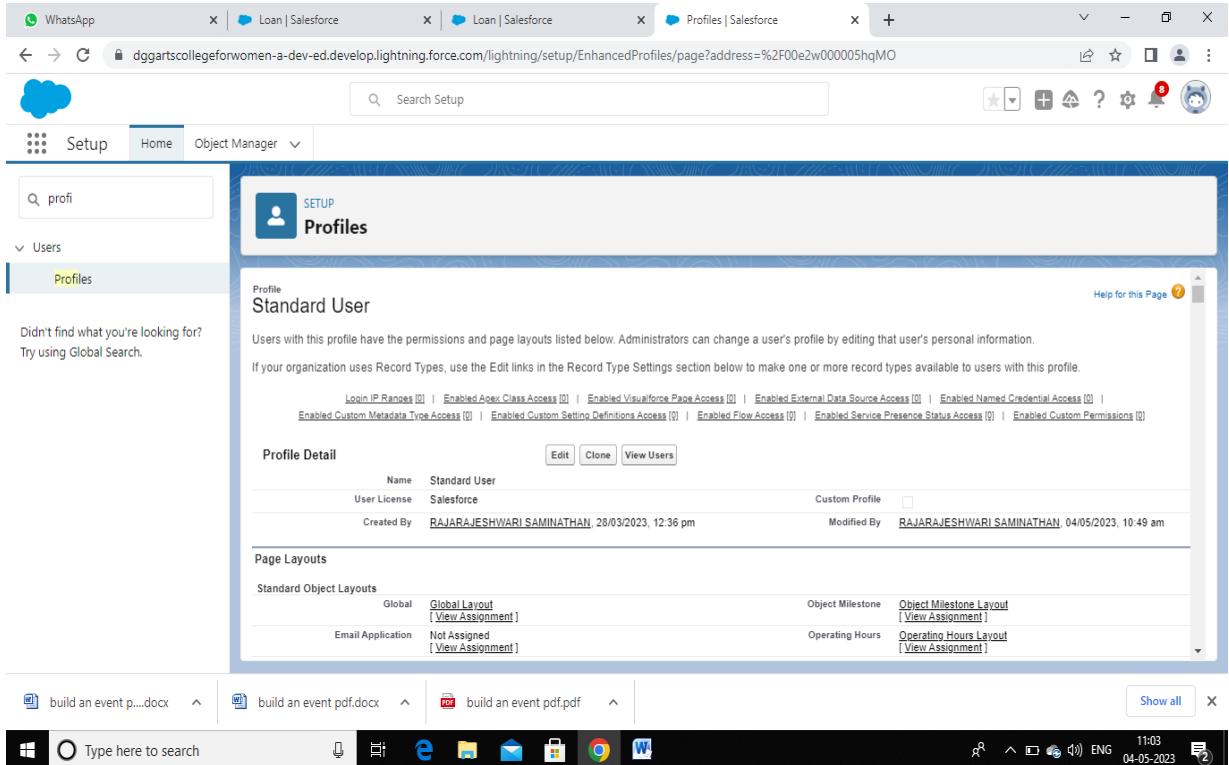
Left sidebar navigation includes: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

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

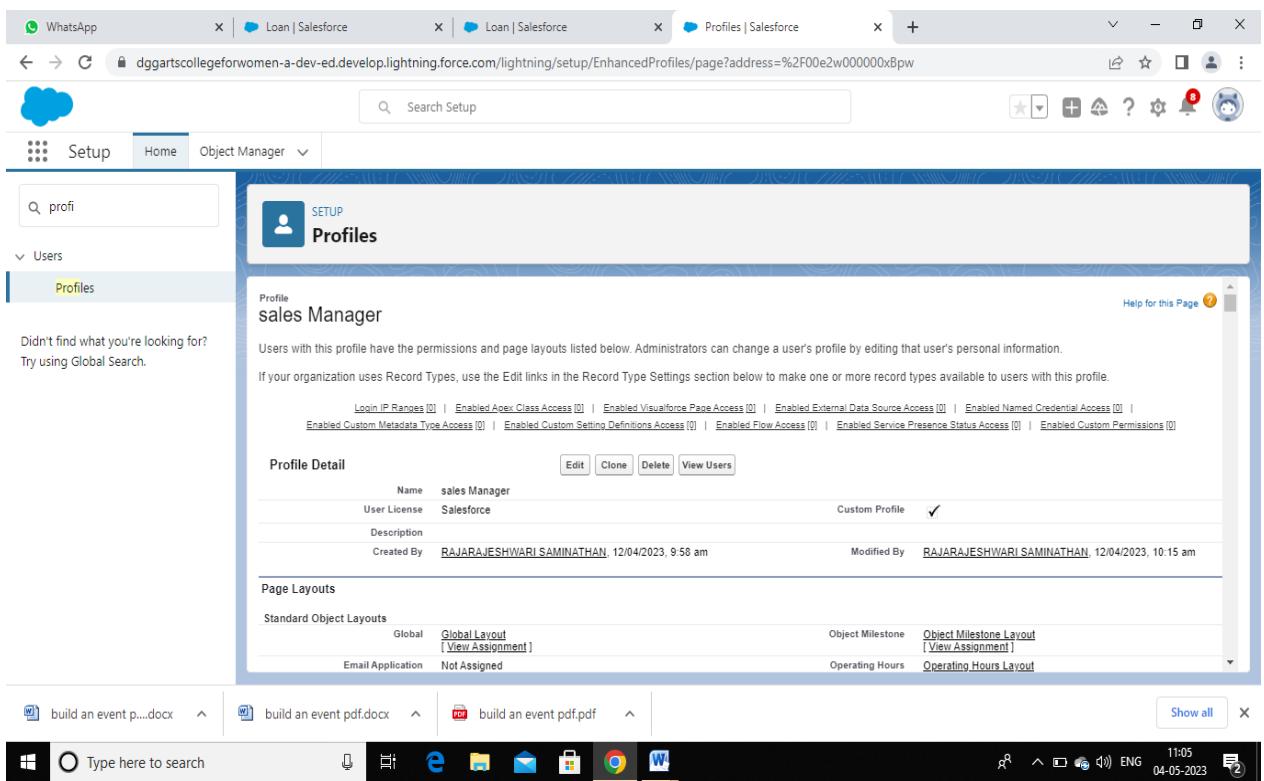


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Milestone 6:



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile being viewed is 'Standard User'. The 'Profile Detail' section shows the name 'Standard User', user license 'Salesforce', and creation details ('Created By: RAJARAJESHWARI SAMINATHAN, 28/03/2023, 12:36 pm'). The 'Page Layouts' section shows standard object layouts for Global and Email Application, and object milestones for Object Milestone and Operating Hours.



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile being viewed is 'sales Manager'. The 'Profile Detail' section shows the name 'sales Manager', user license 'Salesforce', and creation details ('Created By: RAJARAJESHWARI SAMINATHAN, 12/04/2023, 9:58 am'). The 'Page Layouts' section shows standard object layouts for Global and Email Application, and object milestones for Object Milestone and Operating Hours.

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The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'Marketing Executive1' is displayed, which was created by RAJARAJESHWARI SAMINATHAN on 12/04/2023, 10:01 am. It has a 'Custom Profile' checkbox checked. Under 'Page Layouts', the 'Standard Object Layouts' section shows 'Global' and 'Object Milestone' both assigned to 'Global Layout [View Assignment]'. The 'Operating Hours' section shows 'Not Assigned' and 'Operating Hours Layout'.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'Marketing Executive 2' is displayed, which was created by RAJARAJESHWARI SAMINATHAN on 12/04/2023, 10:02 am. It has a 'Custom Profile' checkbox checked. Under 'Page Layouts', the 'Standard Object Layouts' section shows 'Global' and 'Object Milestone' both assigned to 'Global Layout [View Assignment]'. The 'Operating Hours' section shows 'Email Application' and 'Operating Hours Layout'.

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The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile being viewed is 'Marketing Manager'. The page includes sections for 'Profile Detail' (Name: Marketing Manager, User License: Salesforce Platform, Description: Not Assigned, 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: Global - Global Layout [View Assignment], Email Application - Not Assigned), and 'Permissions' (a long list of enabled access types). The browser taskbar at the bottom shows multiple tabs related to WhatsApp, Loan, and Profiles.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile being viewed is 'Marketing'. The page includes sections for 'Profile Detail' (Name: Marketing, User License: Salesforce, Description: Not Assigned, 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: Global - Global Layout [View Assignment], Email Application - Not Assigned), and 'Permissions' (a long list of enabled access types). The browser taskbar at the bottom shows multiple tabs related to WhatsApp, Loan, and Profiles.

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The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'Sales Rep 1' is displayed, which includes the following details:

Name	Sales Rep 1
User License	Salesforce
Description	Created By RAJARAJESHWARI SAMINATHAN 12/04/2023, 10:23 am
Modified By	RAJARAJESHWARI SAMINATHAN 12/04/2023, 10:27 am

The 'Page Layouts' section shows the following assignments:

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

At the bottom of the browser window, there are several tabs labeled 'build an event p....docx', 'build an event pdf.docx', and 'build an event pdf.pdf'. The taskbar at the bottom right shows the date as 04-05-2023 and the time as 11:11.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'Sales Rep 2' is displayed, which includes the following details:

Name	Sales Rep 2
User License	Salesforce
Description	Created By RAJARAJESHWARI SAMINATHAN 12/04/2023, 10:23 am
Modified By	RAJARAJESHWARI SAMINATHAN 12/04/2023, 10:29 am

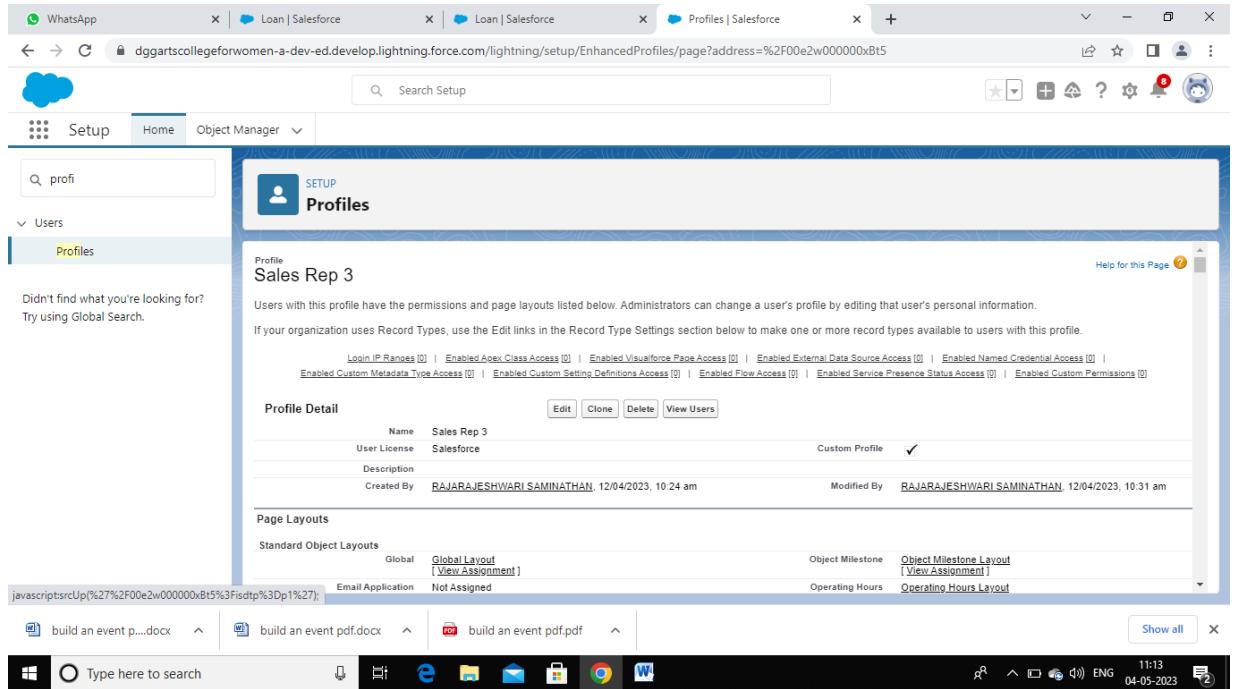
The 'Page Layouts' section shows the following assignments:

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

At the bottom of the browser window, there are several tabs labeled 'build an event p....docx', 'build an event pdf.docx', and 'build an event pdf.pdf'. The taskbar at the bottom right shows the date as 04-05-2023 and the time as 11:12.



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Sales Rep 3

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.

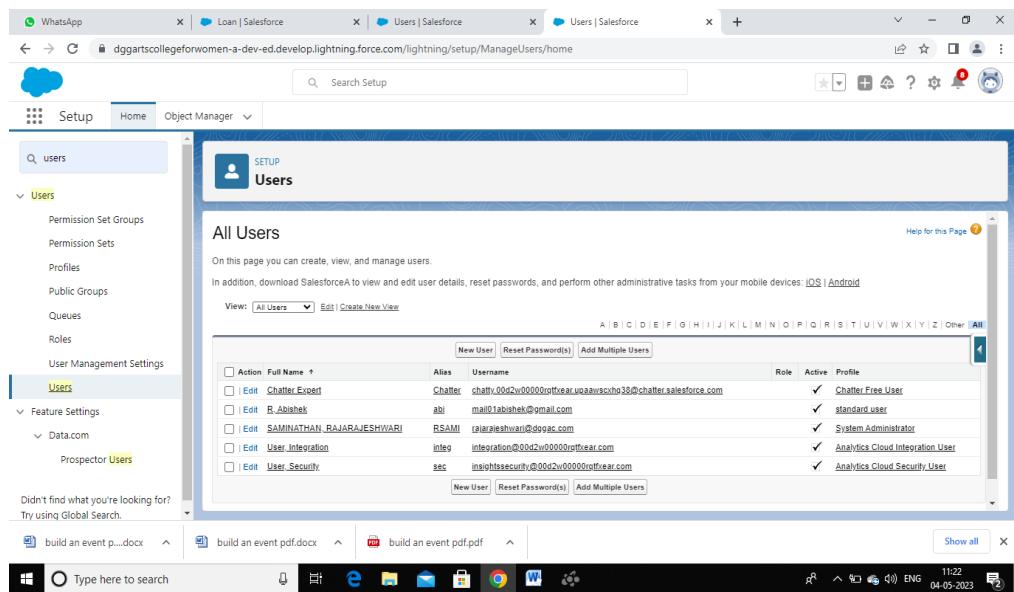
Profile Detail	
Name	Sales Rep 3
User License	Salesforce
Description	
Created By	RAJARAJESHWARI SAMINATHAN, 12/04/2023, 10:24 am
Modified By	RAJARAJESHWARI SAMINATHAN, 12/04/2023, 10:31 am

Page Layouts

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

Creation of the profile for sales and marketing

Milestone7:



All Users

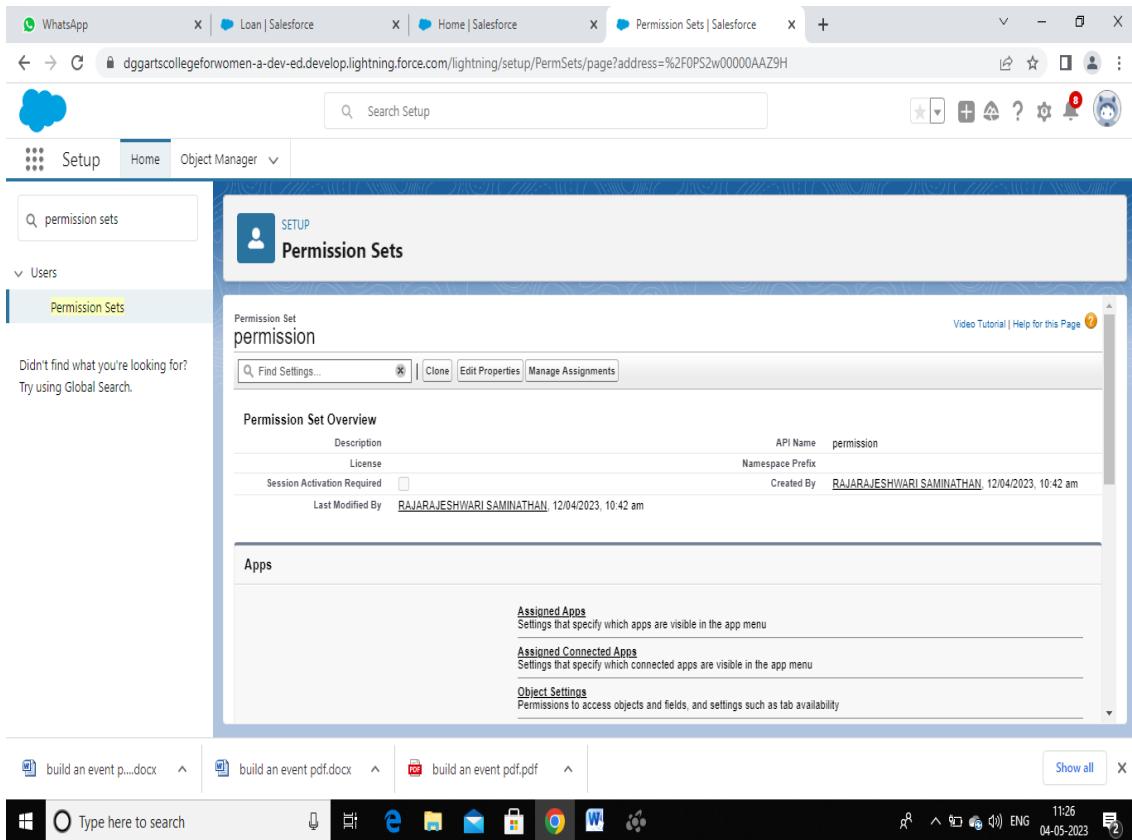
On this page you can create, view, and manage users.

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	chatty.00d2w00000000000000000000000000	chatter.salesforce.com	✓	✓	Chatter Free User
<input type="checkbox"/>	R_Abhishek	abi	mail01abhishek@gmail.com	✓	✓	standard user
<input type="checkbox"/>	SAMINATHAN_RAJARAJESHWARI	RSAMI	rajareshwari09@oac.com	✓	✓	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00d2w00000000000000000000000000	✓	✓	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d2w00000000000000000000000000	✓	✓	Analytics Cloud Security User

CREATION OF THE NEW USER

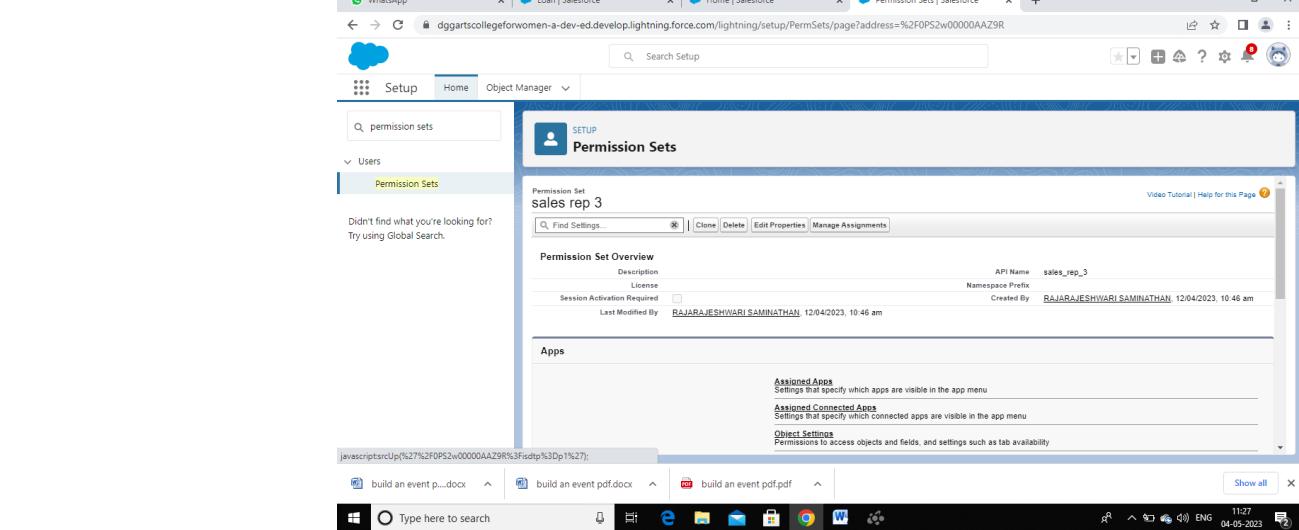
Milestone 8:



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The URL in the browser is dgartscollegeforwomen-a-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w0000AAZ9H. The page title is 'Permission Sets'. On the left sidebar, 'Permission Sets' is selected under the 'Users' category. The main content area displays a 'Permission Set Overview' for a record named 'permission'. The overview includes fields for Description, License, Session Activation Required, Namespace Prefix, Created By (BAJARAJESHWARI SAMINATHAN), and Last Modified By (BAJARAJESHWARI SAMINATHAN) at 12/04/2023, 10:42 am. Below the overview, there are sections for 'Apps' (Assigned Apps, Assigned Connected Apps, Object Settings) and a 'Manage Assignments' button. The bottom of the screen shows a Windows taskbar with several open documents and system icons.

Creation of the permission set

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Creation of the permission set

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Milestone 9:

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The 'Sharing Settings' tab is selected under the 'Security' section. A message at the top says 'Didn't find what you're looking for? Try using Global Search.' Below this, there's a search bar and a dropdown menu 'Manage sharing settings for: All Objects'. The main area displays 'Organization-Wide Defaults' for various objects like Lead, Account and Contract, Contact, Order, and Asset. The table shows columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. Most objects have 'Public Read/Write' or 'Controlled by Parent' as their default internal access, while external access is generally 'Private'. The 'Grant Access Using Hierarchies' column has a checkmark for all objects.

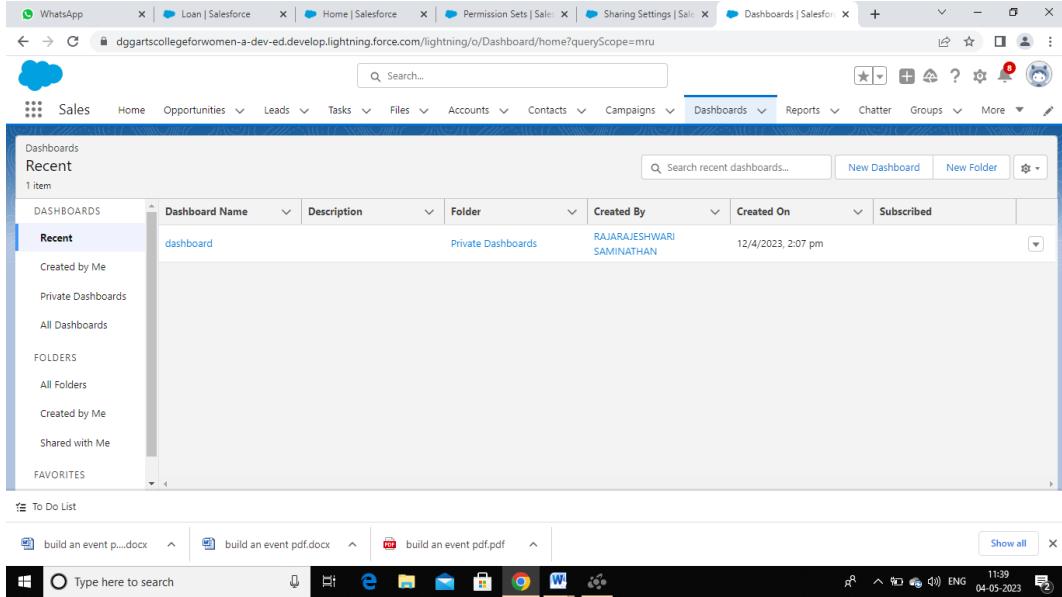
Create OWD setting

Milestone 10:

The screenshot shows the 'Reports' page in the Salesforce Sales console. The 'Recent' section on the left lists reports like 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', and 'Shared with Me'. The main area displays a table of recent reports. One report titled 'total number of loan' is shown, created by RAJARAJESHWARI SAMINATHAN on 12/4/2023 at 1:57 pm. The table columns include 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. At the bottom, there are links for 'New Report', 'New Folder', and a 'To Do List'.

Create a report

Milestone 11:



The screenshot shows the Salesforce Lightning interface with the URL dggartscollegeforwomen-a-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, More, and a search bar. The main content area displays a table titled 'Dashboards' under the 'Recent' section. The table has columns: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. One item is listed: 'dashboard' in the 'Private Dashboards' folder, created by RAJARAJESHWARI SAMINATHAN on 12/4/2023, 2:07 pm. The sidebar on the left shows categories like DASHBOARDS, FOLDERS, and FAVORITES.

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.