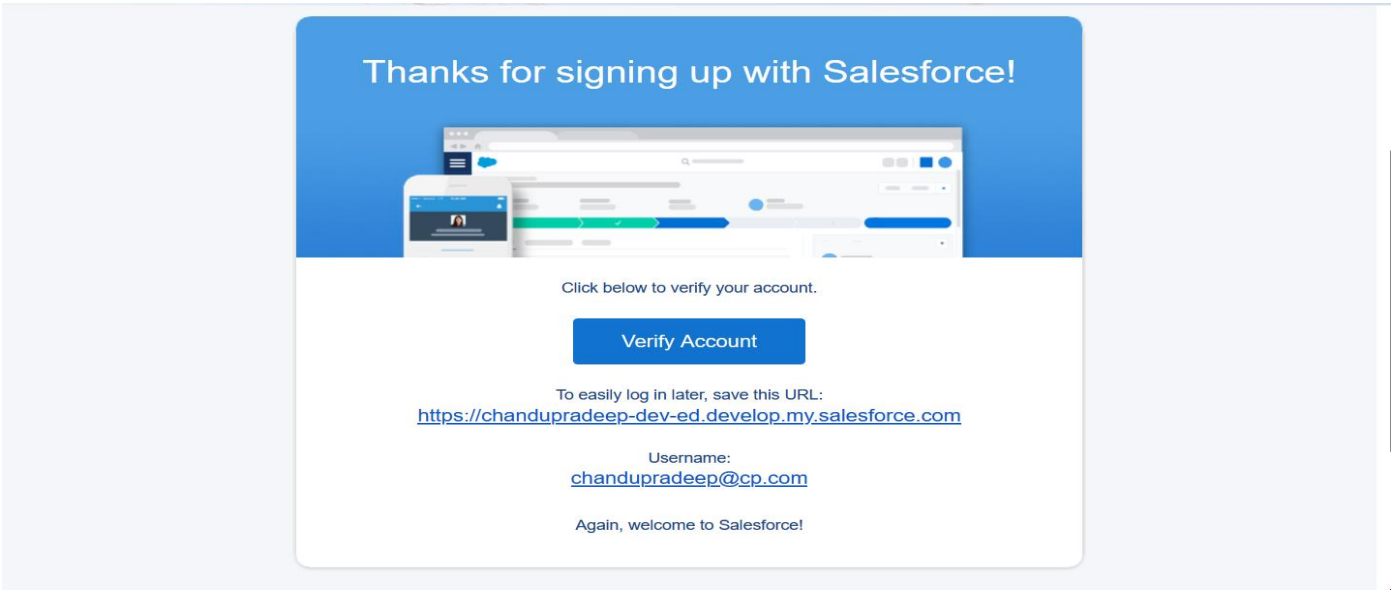
# Property Management Application

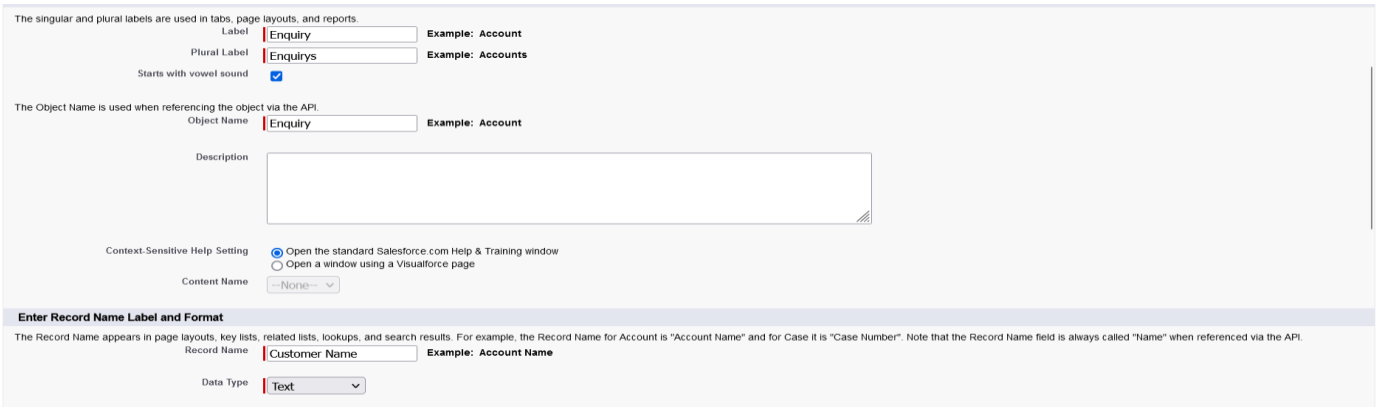
1. Creating Developer Account



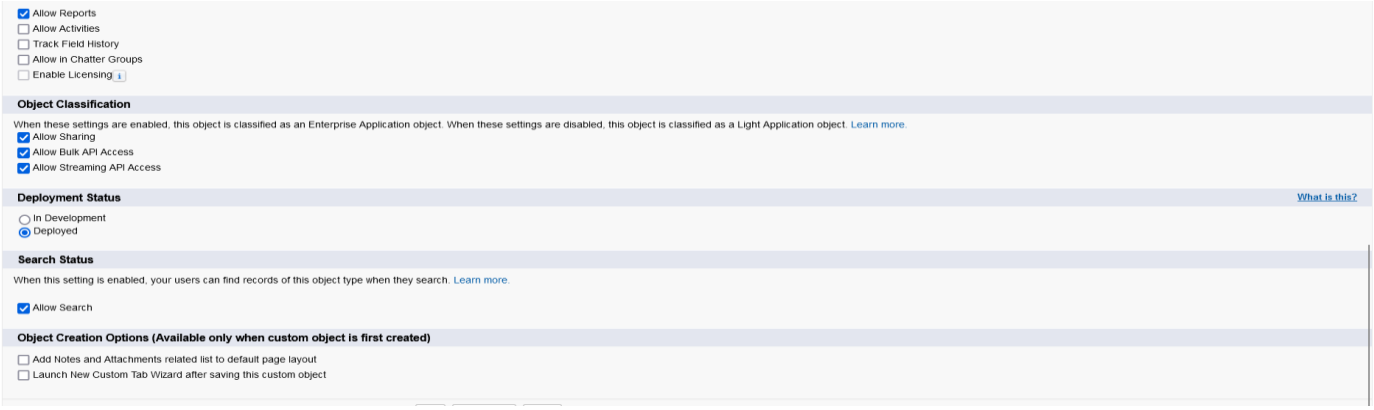

Developer Account is Created and Activated

2. Creating Custom Objects - Enquiry, Property, Loan

Enquiry Object – Created with the Record name (Customer Name)

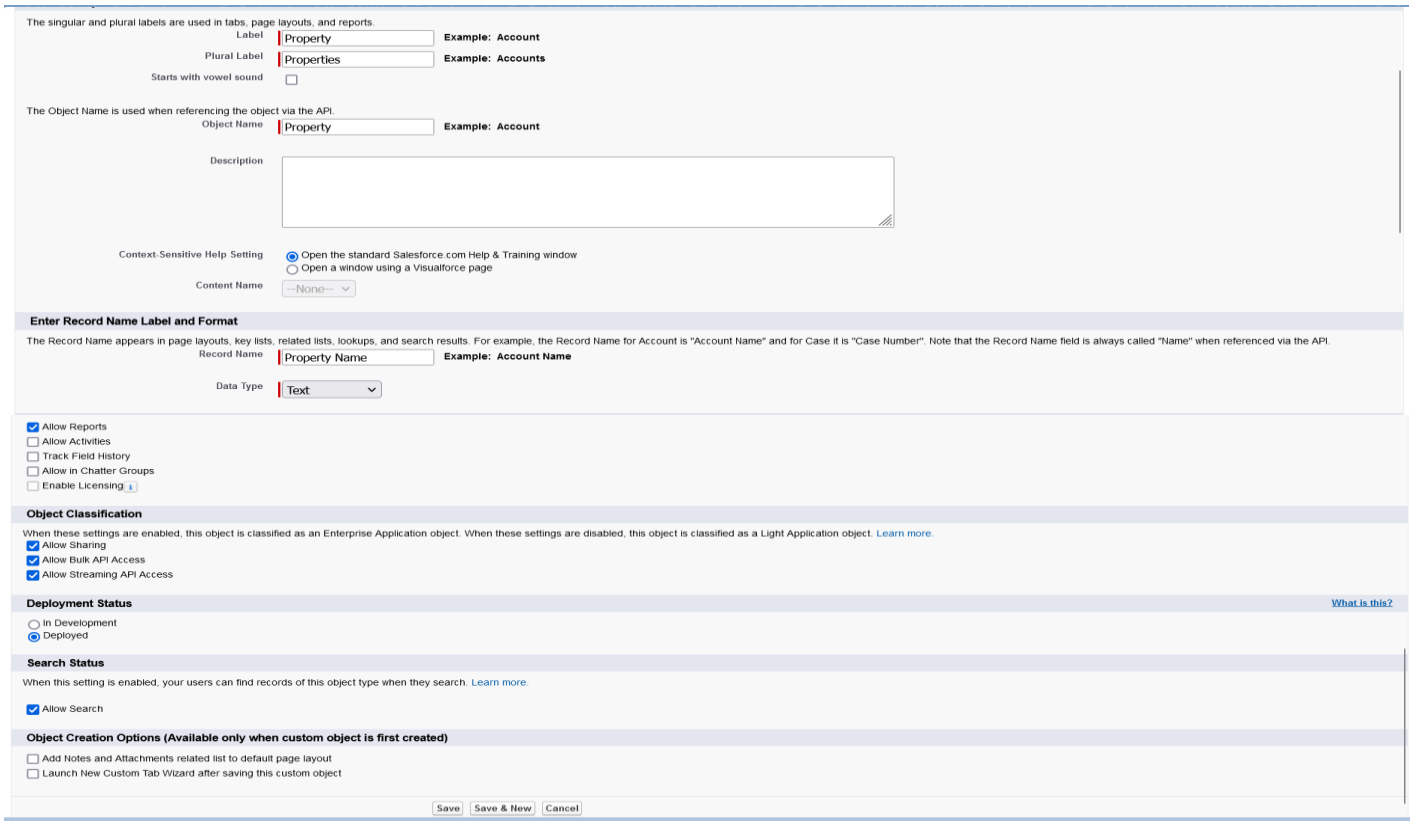



Allowed Search and Reports

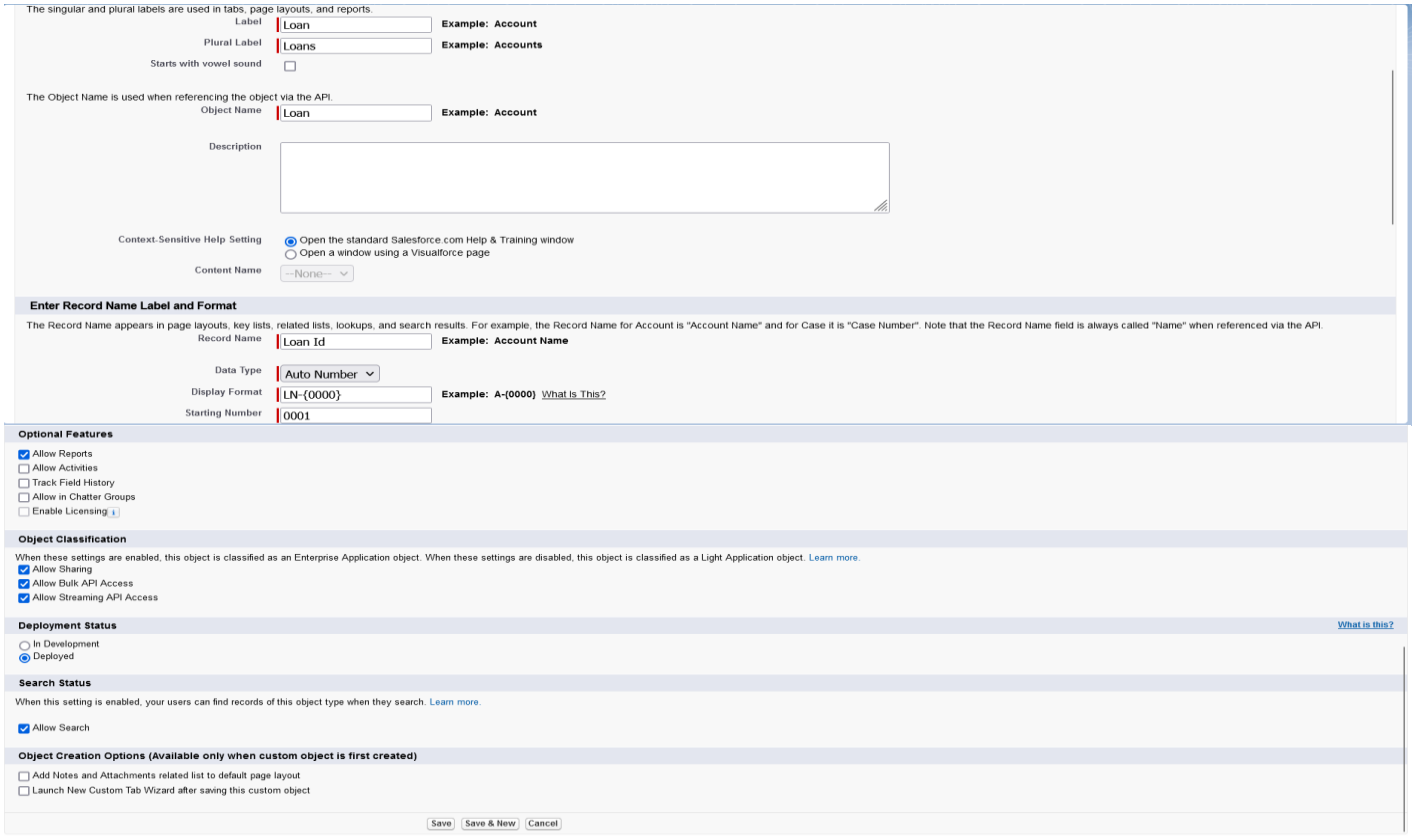


# Property Management Application

Property Object with the Record name (Property Name) and Allowed Search and Reports

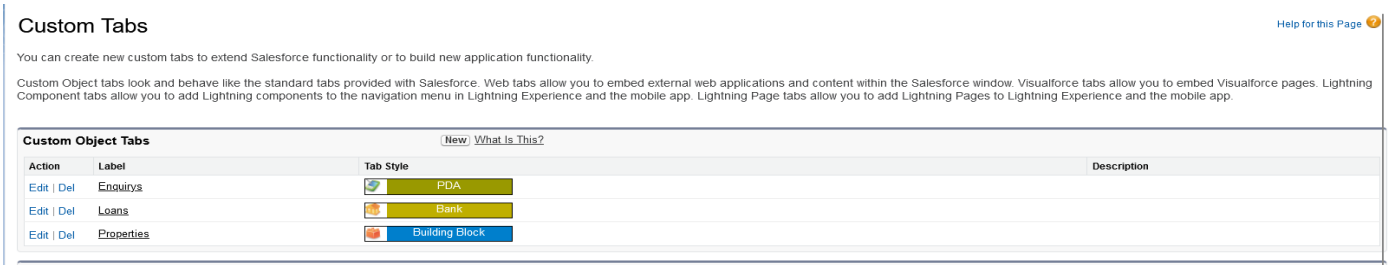



Loan Object with the Record name (Loan Id) Auto Number – LN-{0000} Starting With 0001 and Allowed Search and Reports

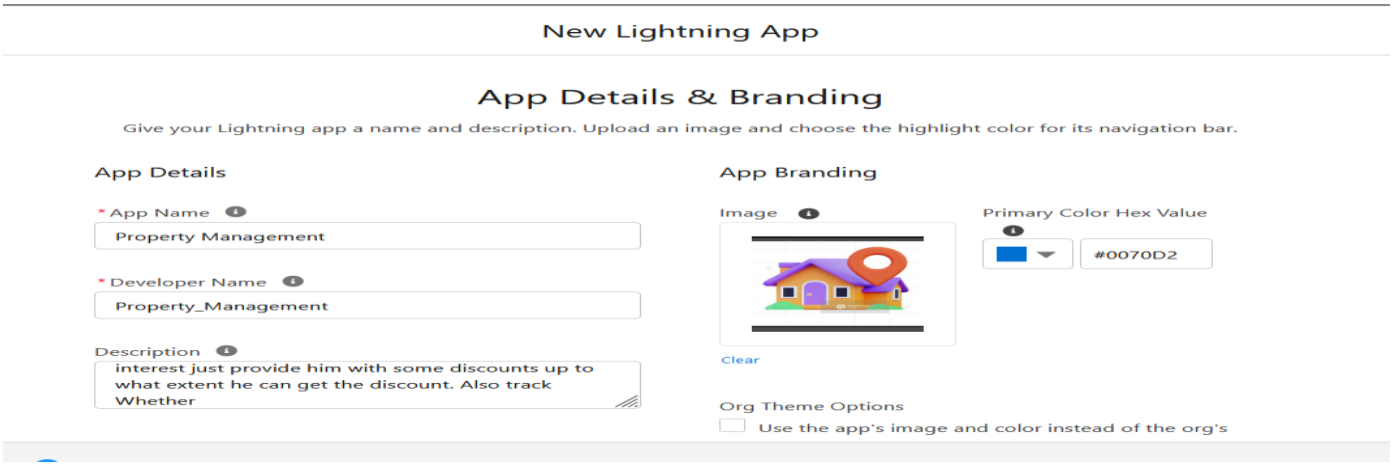


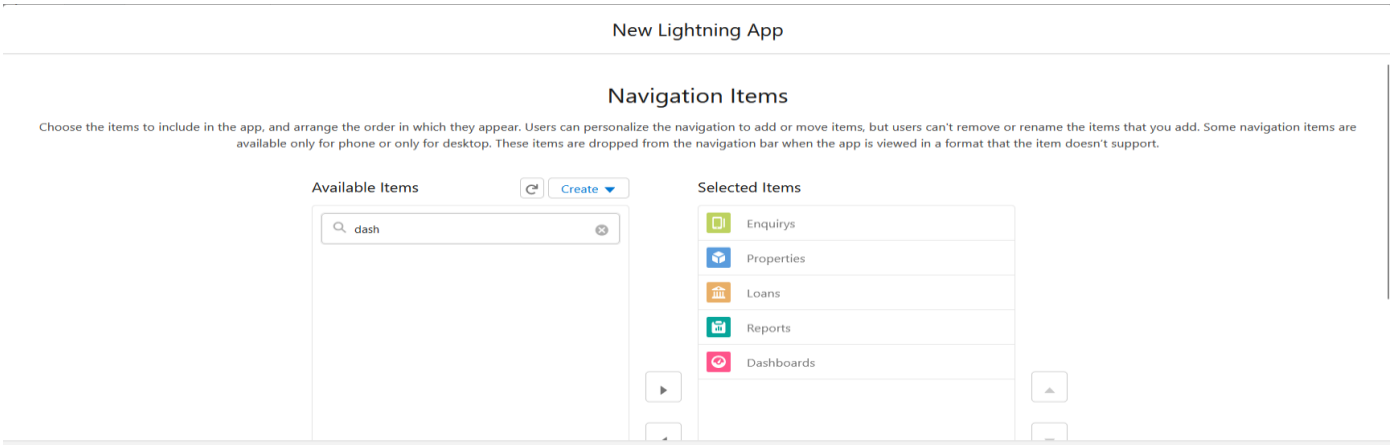
# Property Management Application

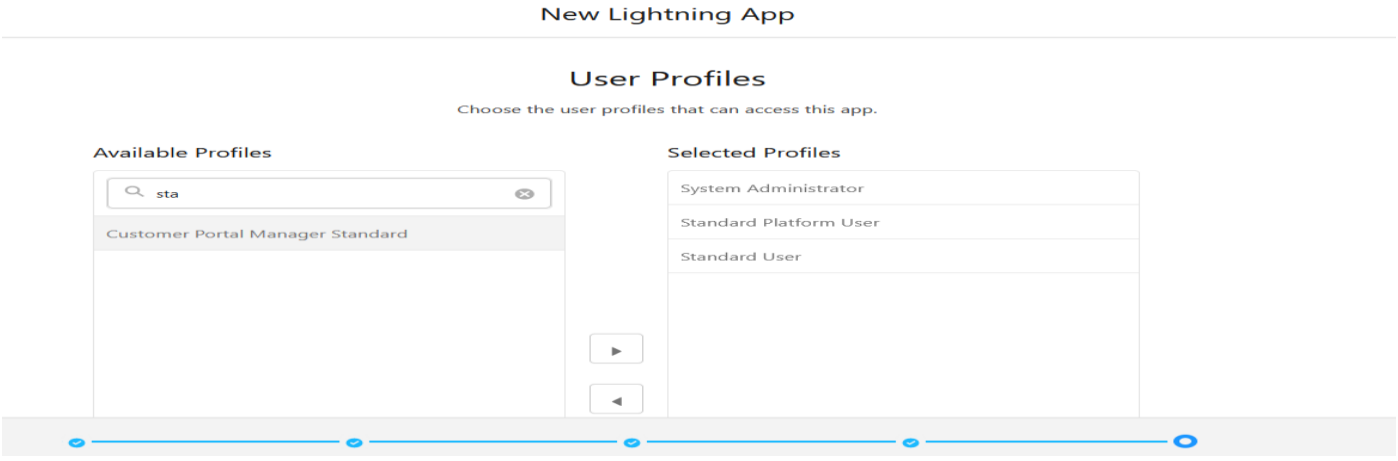
## 3. Creating Lightning Tabs - Enquiry, Property, Loan



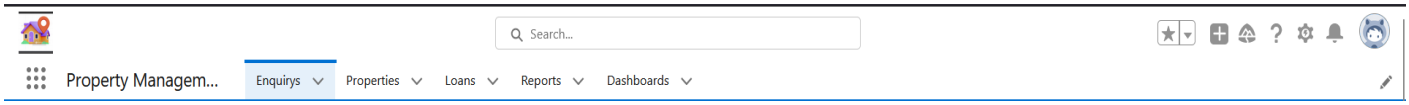

## 4. Create a Lightning App for Property Management Application



# Property Management Application




5. Creating Additional Field for Enquiry, Property, Loan Object

Enquiry Object Fields

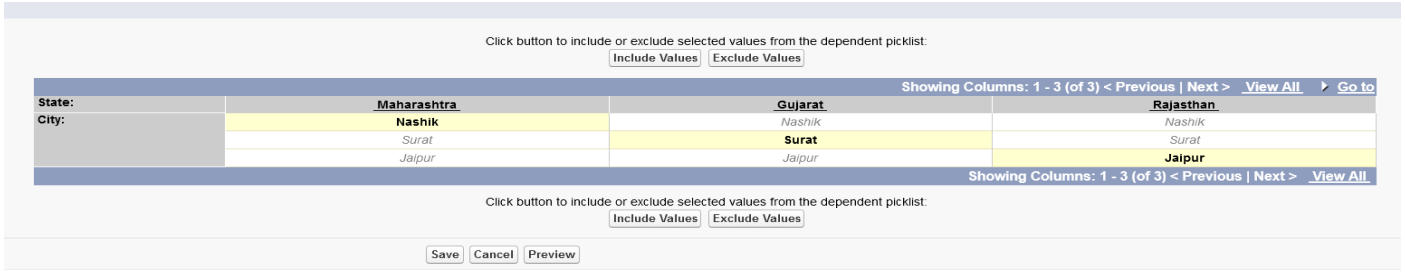
Lead Number

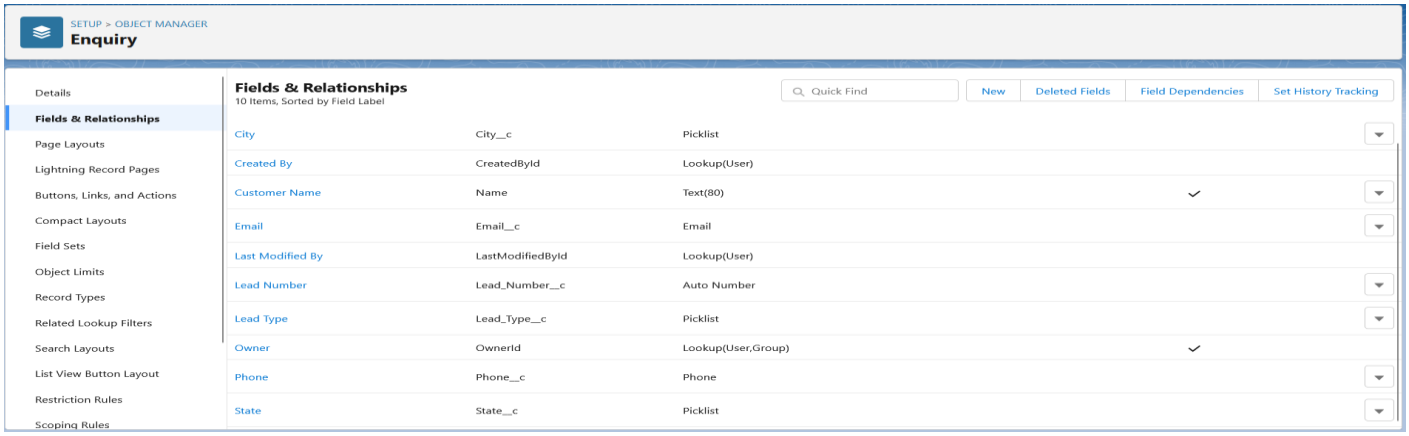
State

City

# Property Management Application

## Creating Fields Dependencies B/w State and city

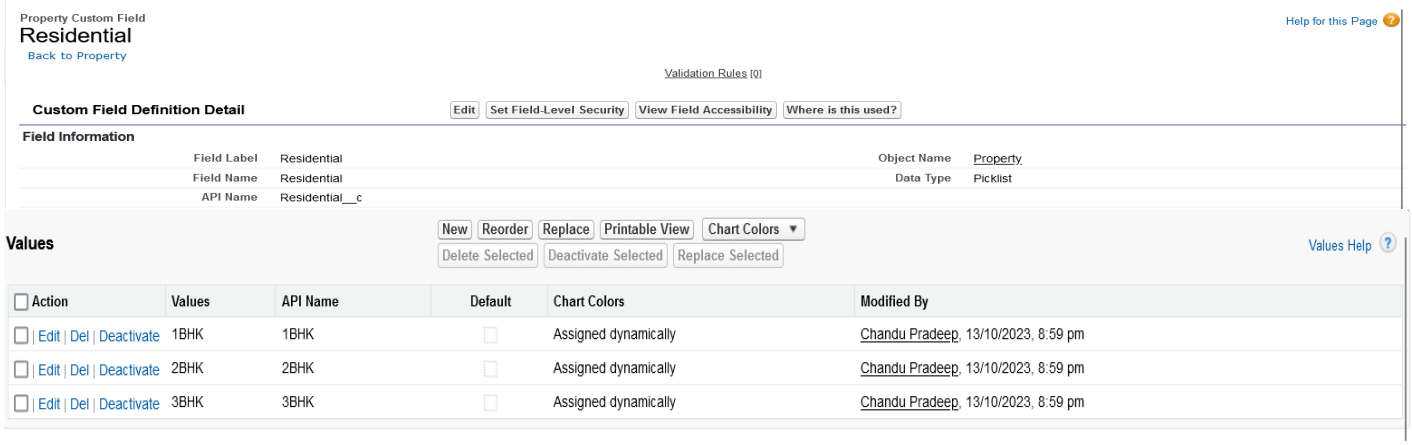



## Property Object Fields

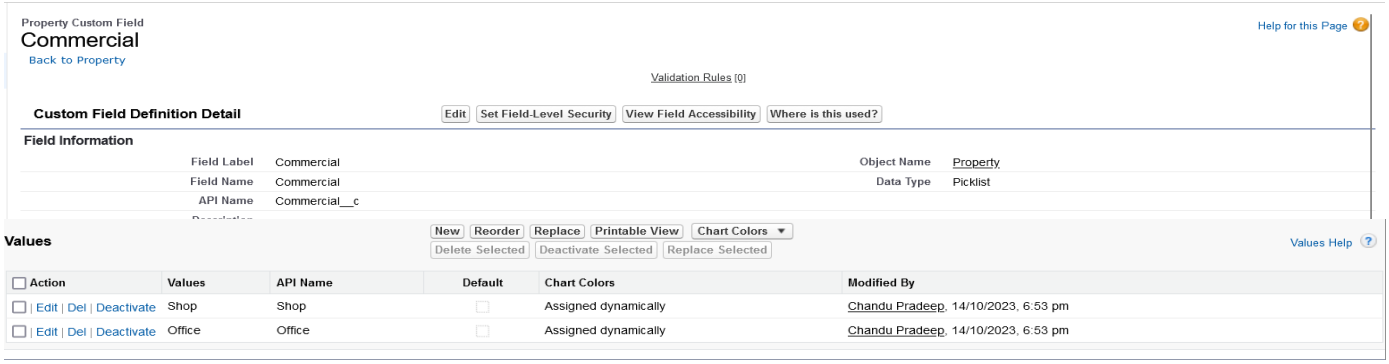
## Property Type

## Residential Type:

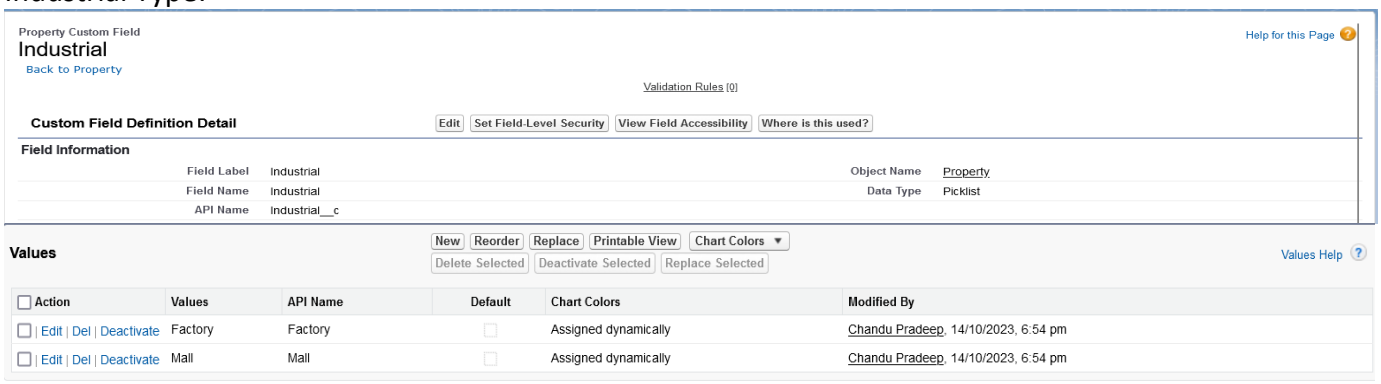


# Property Management Application

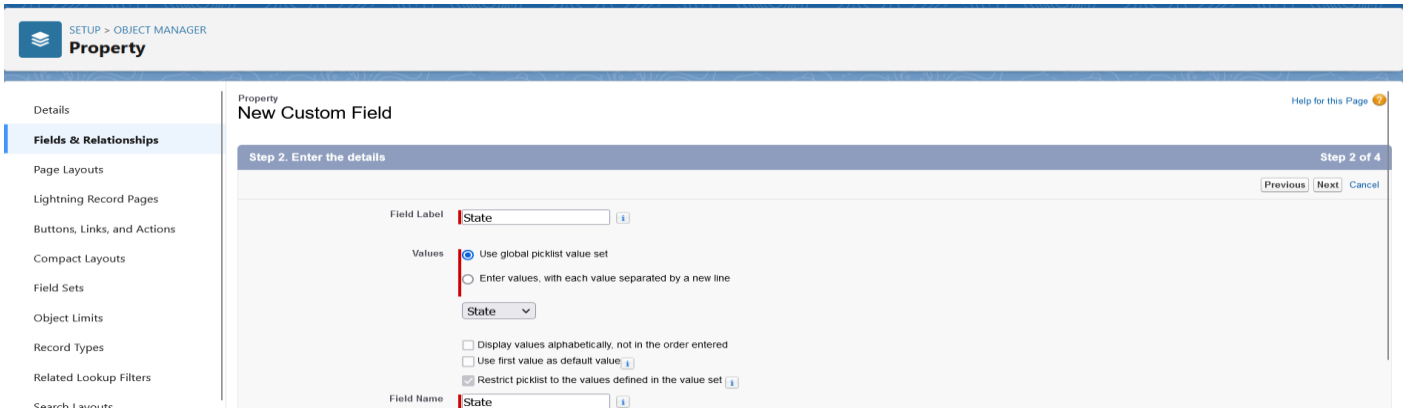
## Commercial Type:



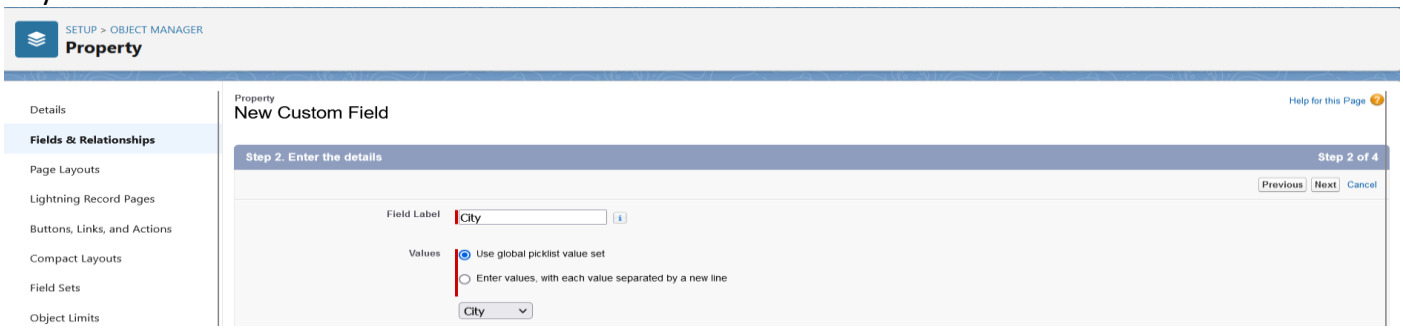

## Industrial Type:




## State Picklist Values Taken from Global Picklist

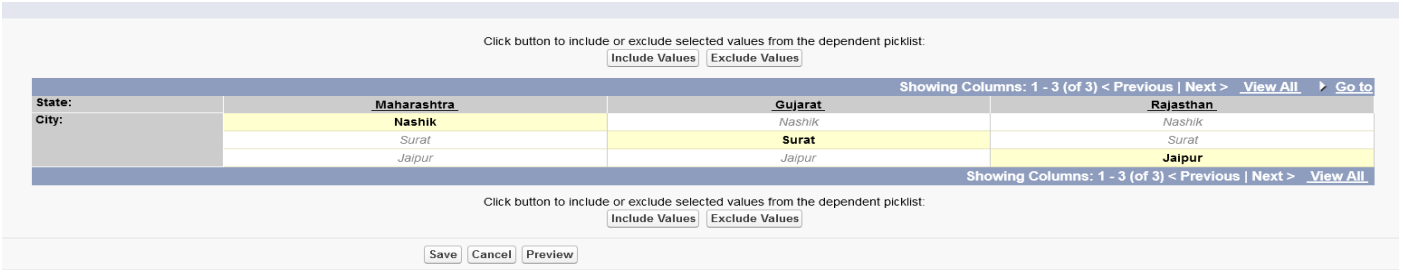



## City Picklist Values Taken from Global Picklist

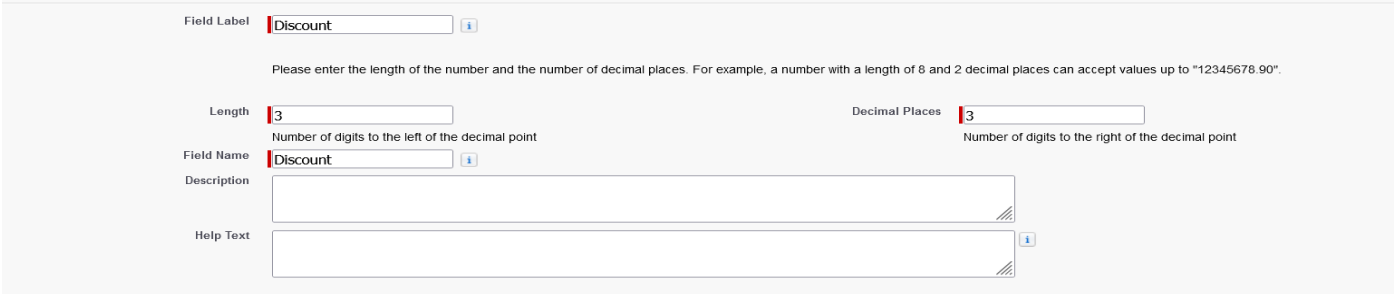


# Property Management Application

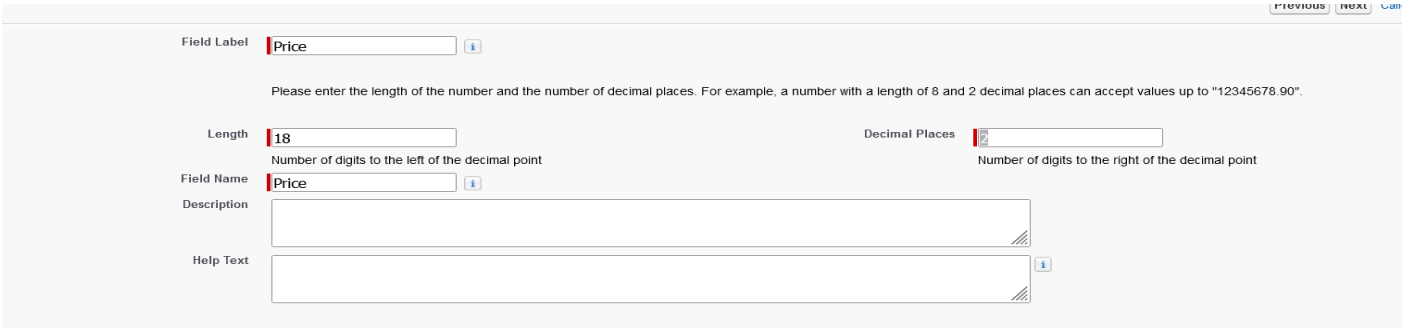
## Creating Fields Dependencies B/w State and city



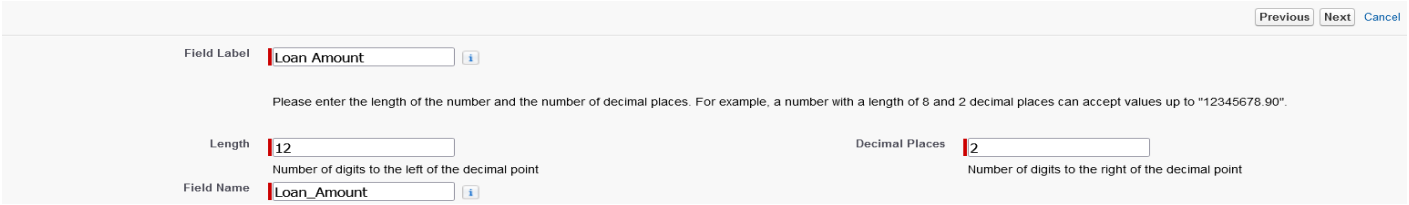

## Discount




## Price



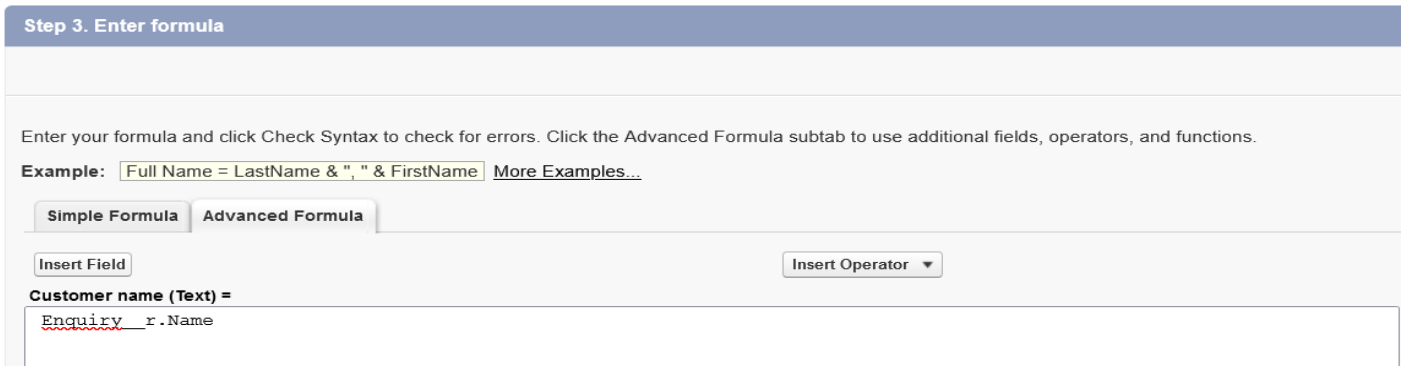

## Loan Amount




## Customer Name

Property

New Custom Field

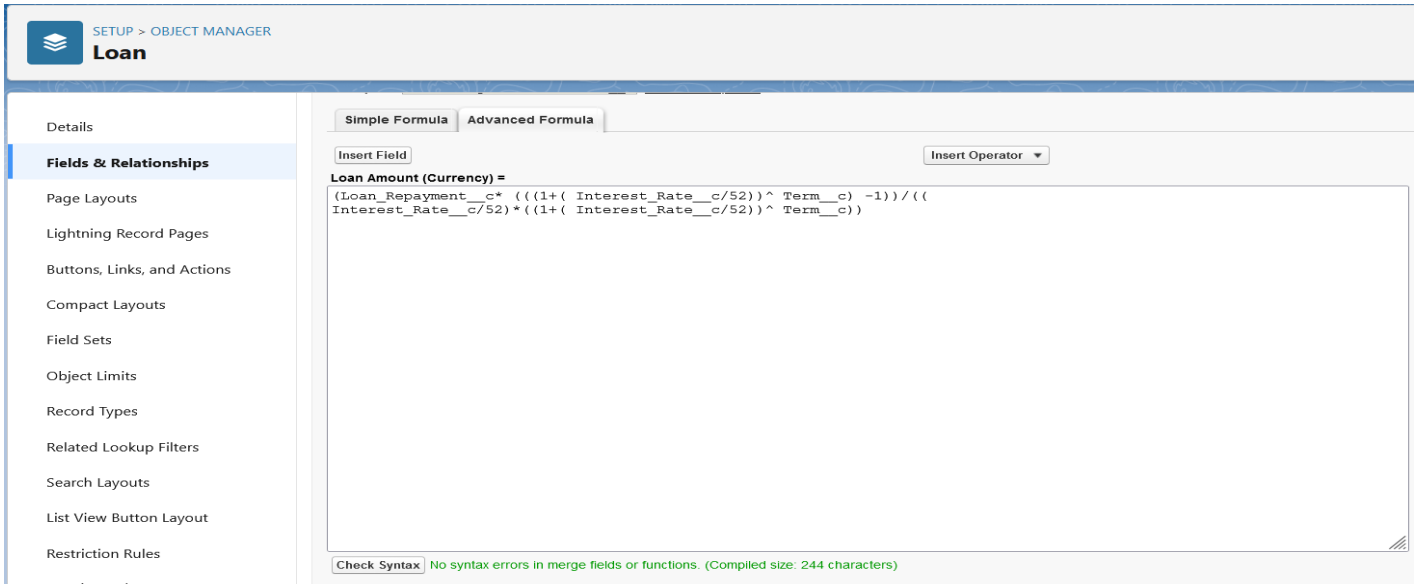



Formula: Enquiry__r.Name

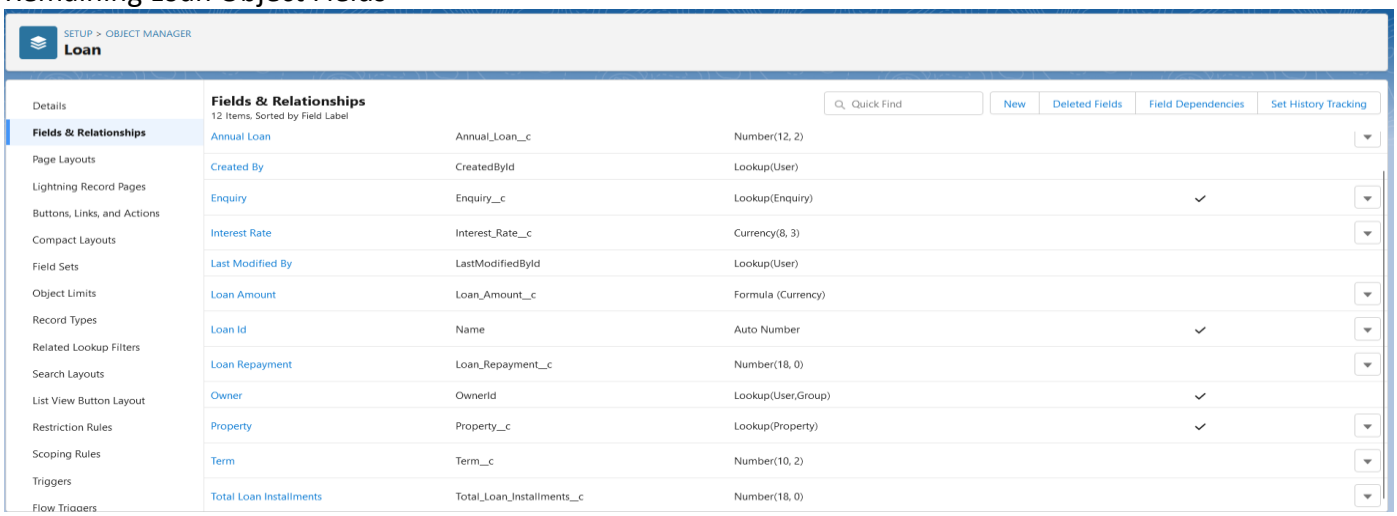
# Property Management Application

## Loan Object Fields

### Loan Amount

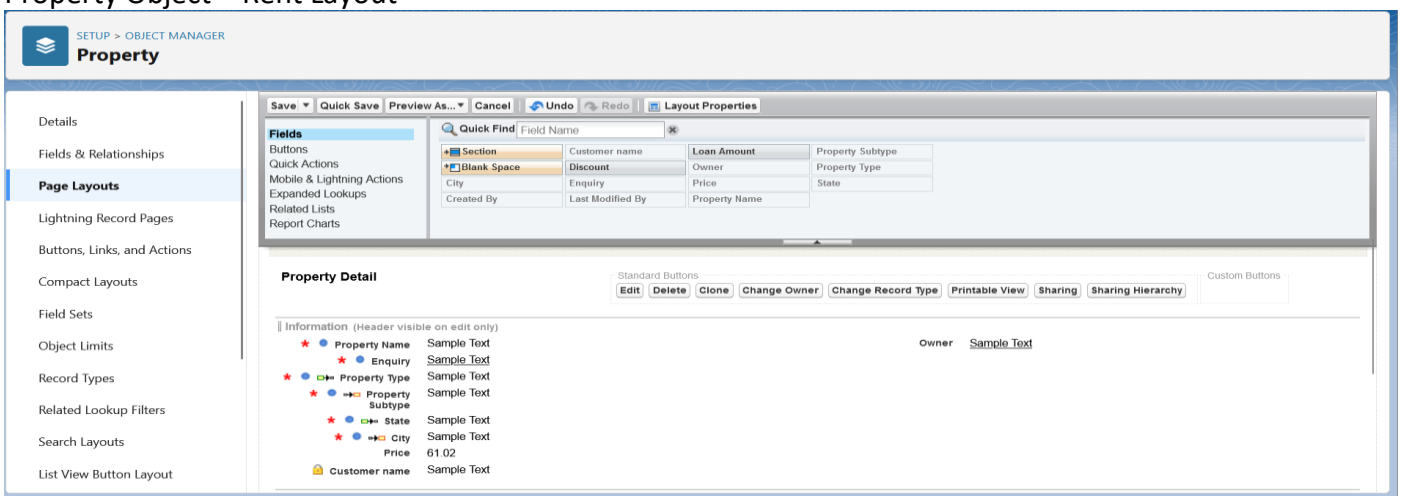



### Remaining Loan Object Fields

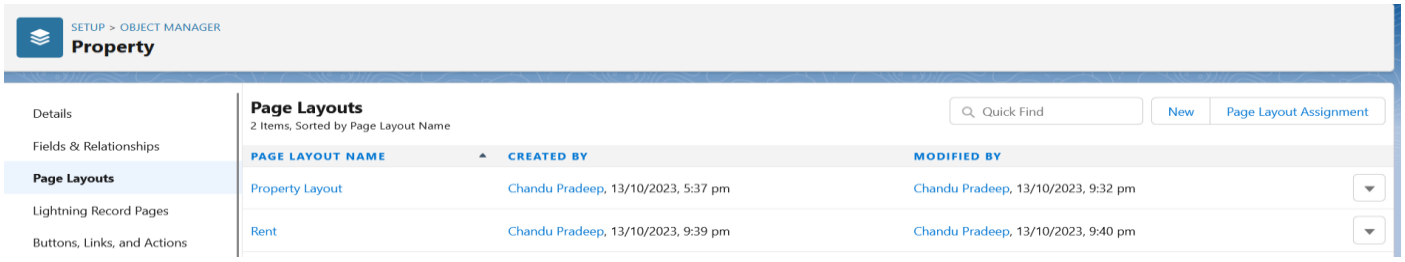



## Page Layout

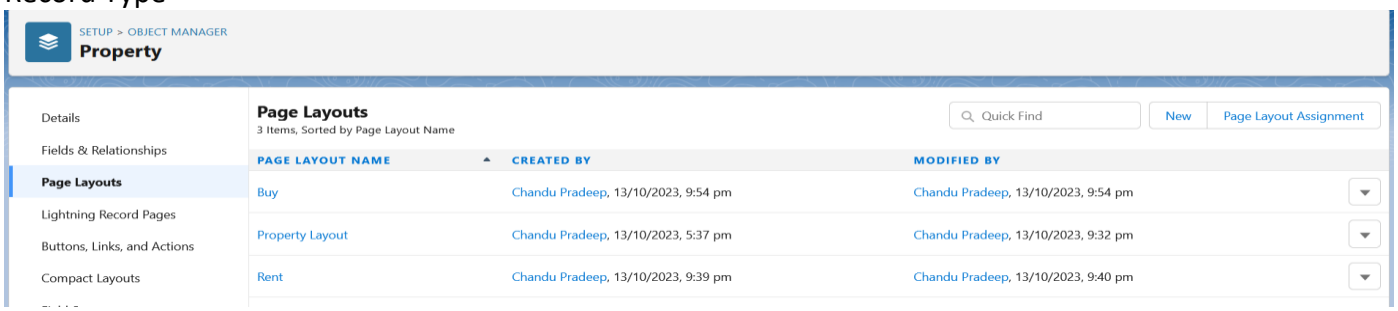
### Property Object – Rent Layout



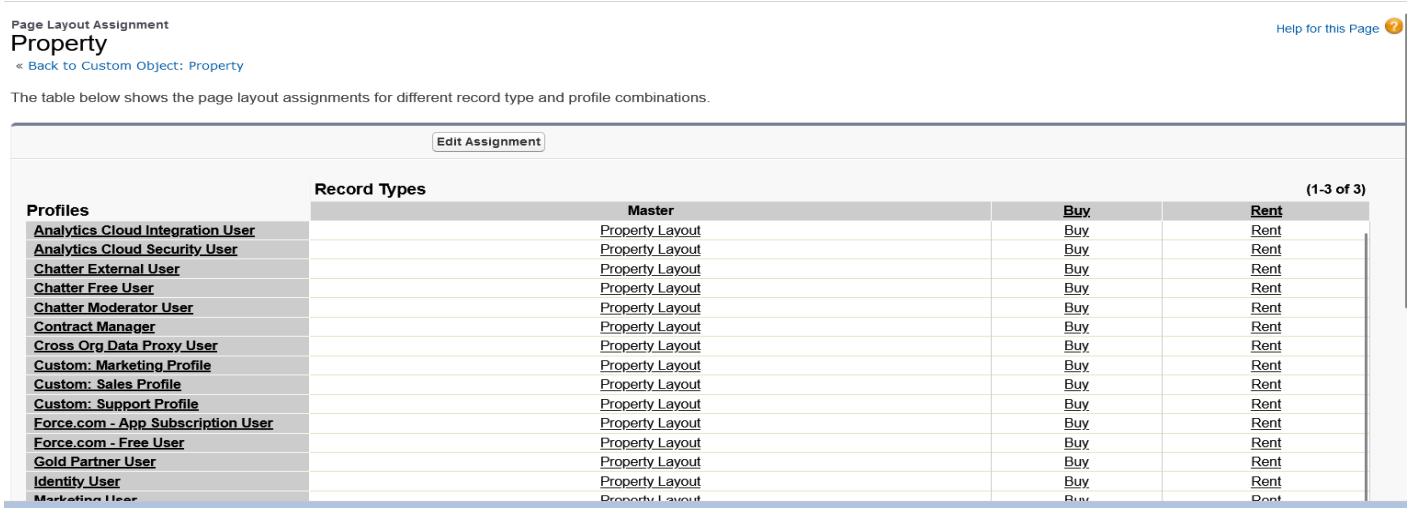
# Property Management Application




## Record Type

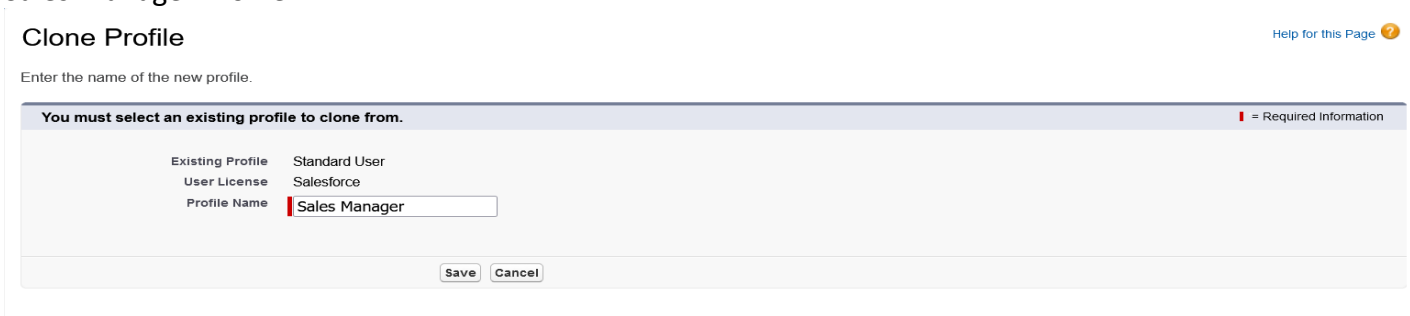



## Record Type Page assignment

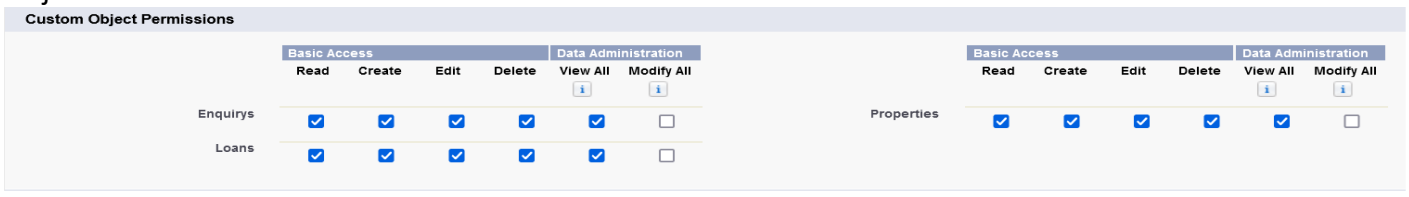



## Profile

## Sales Manager Profile

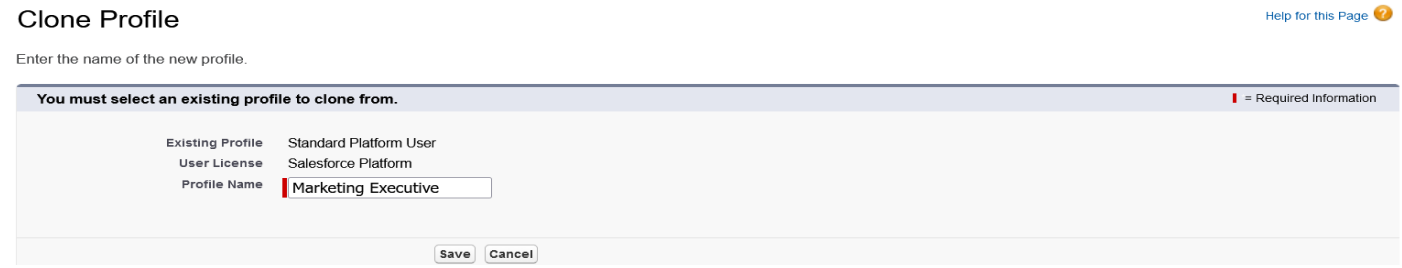



## Object Permissions

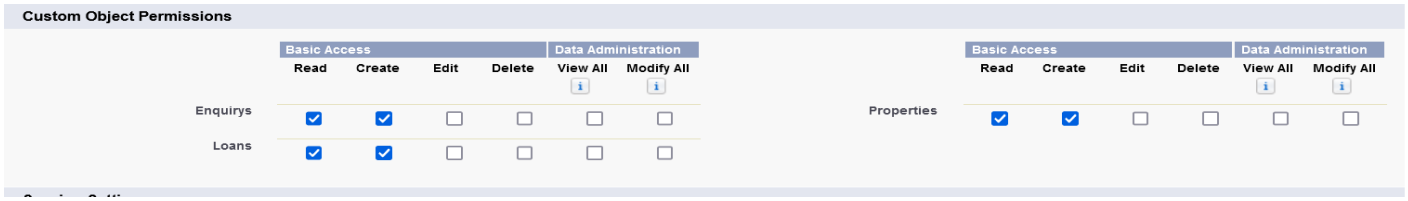


# Property Management Application

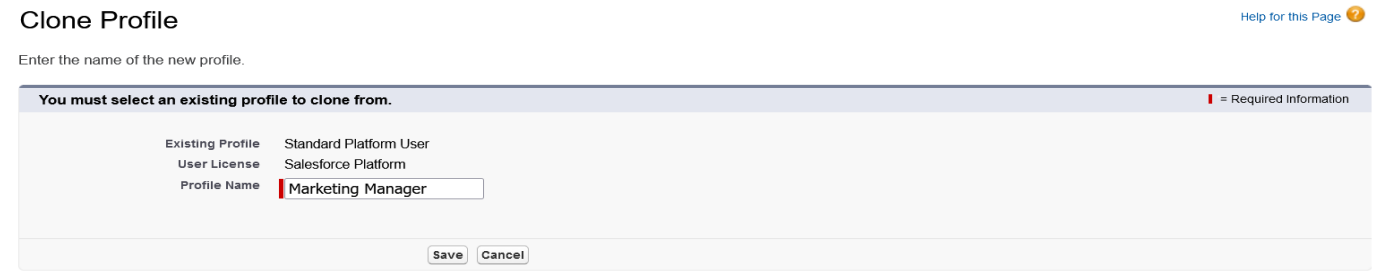
## Marketing Executive Profile



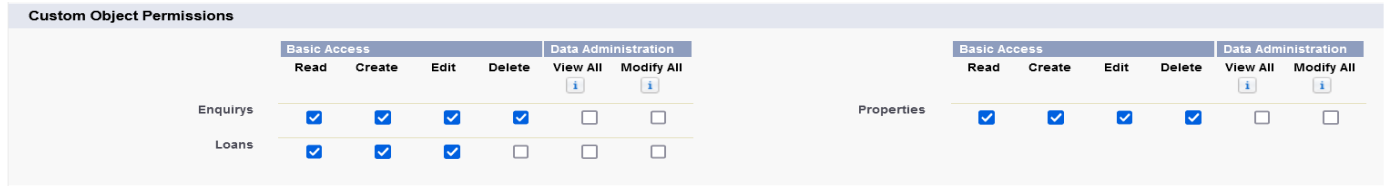

Read And Create access on Enquiry, Loan, Properties to Marketing Executive Profile




## Marketing Manager

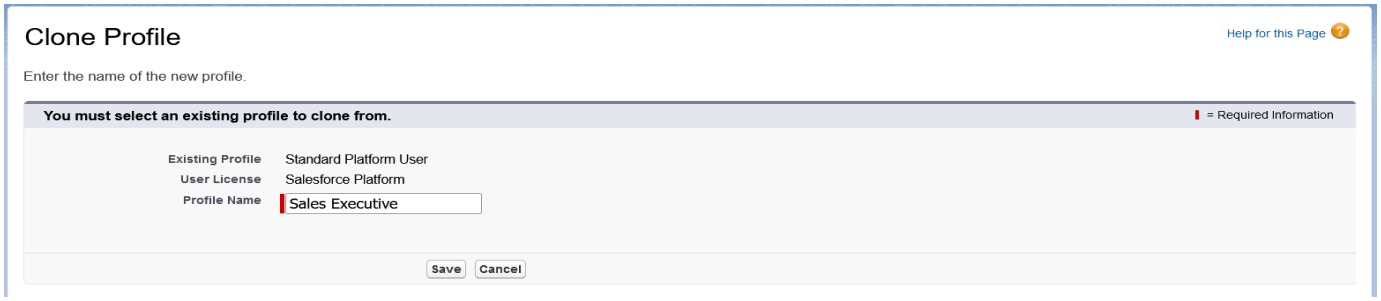



Read, Create, Edit, Delete access on Enquiry, Loan, Properties to Marketing Manager Profile



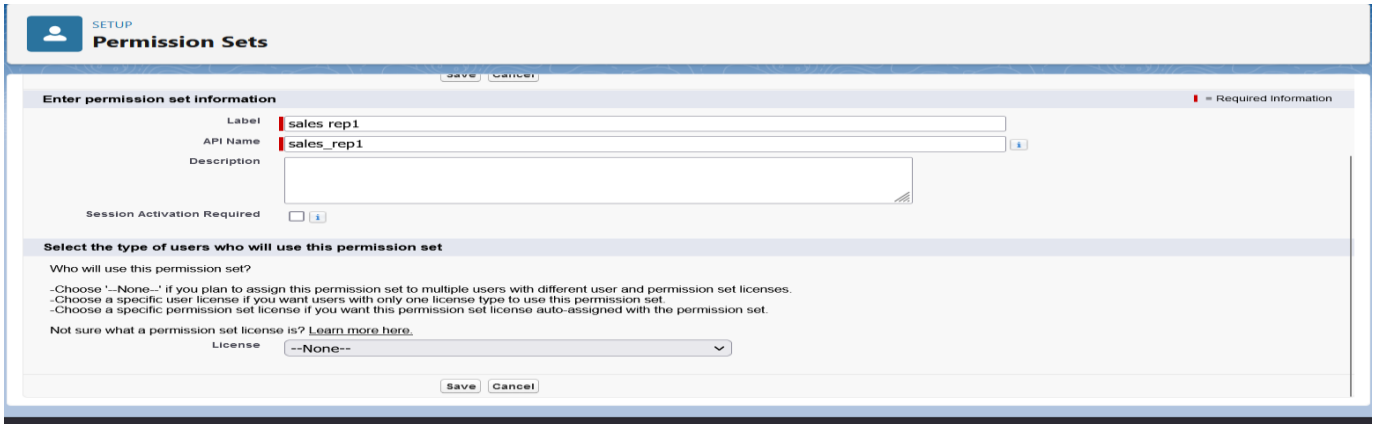

Marketing Manager profile Should Have Access to Marketing Executive profile

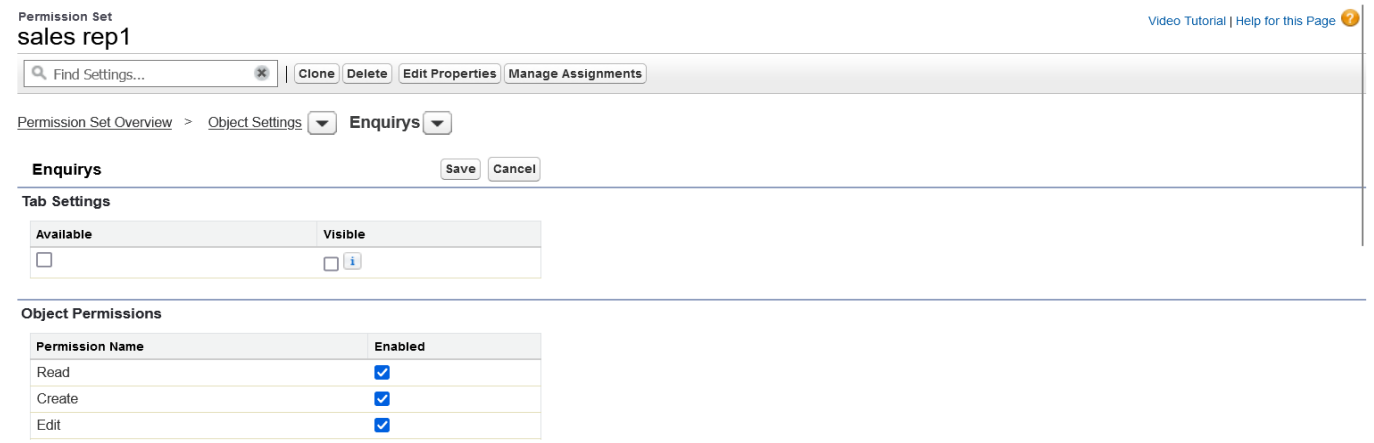
## Sales Executive

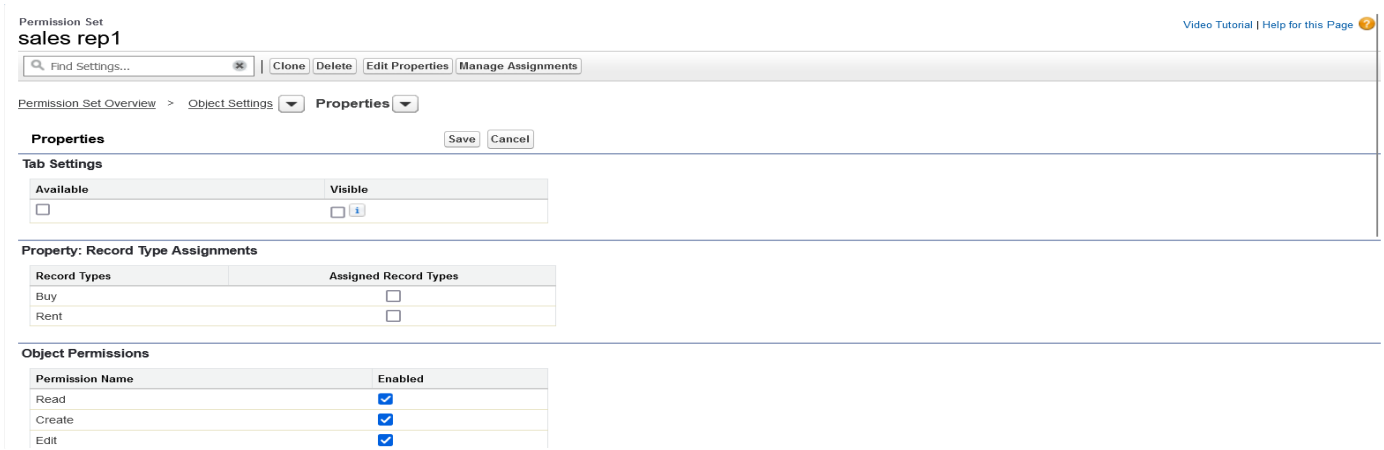


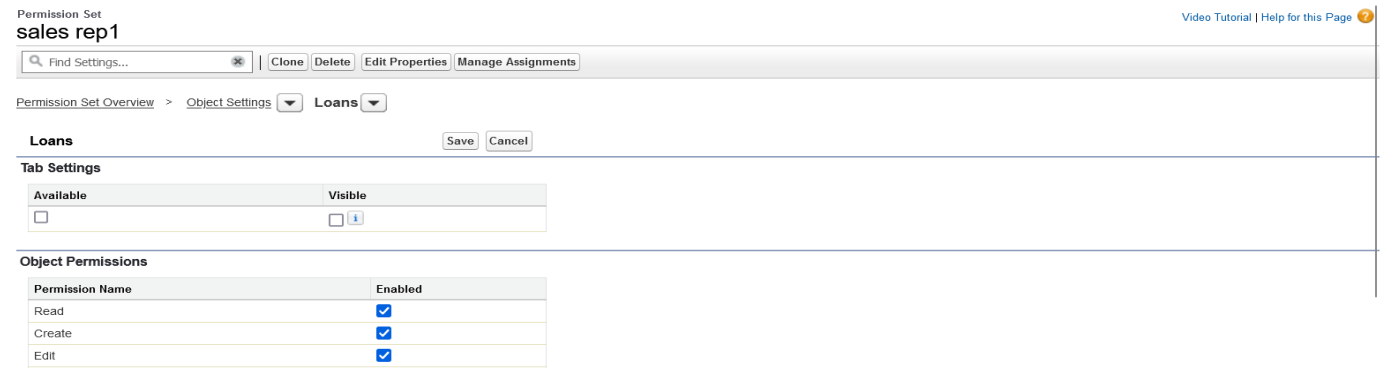

Sales Rep 1 Permission set to Sales Executive to Read ,Create , Edit Enquiry, Loan, Properties

# Property Management Application



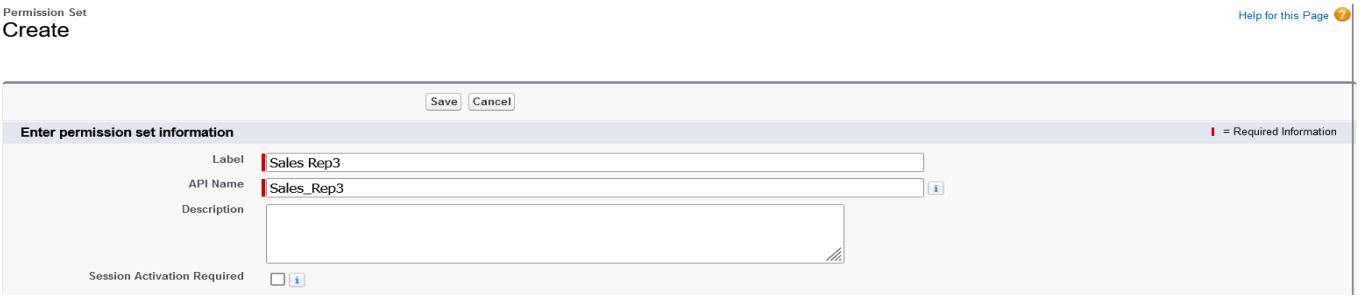



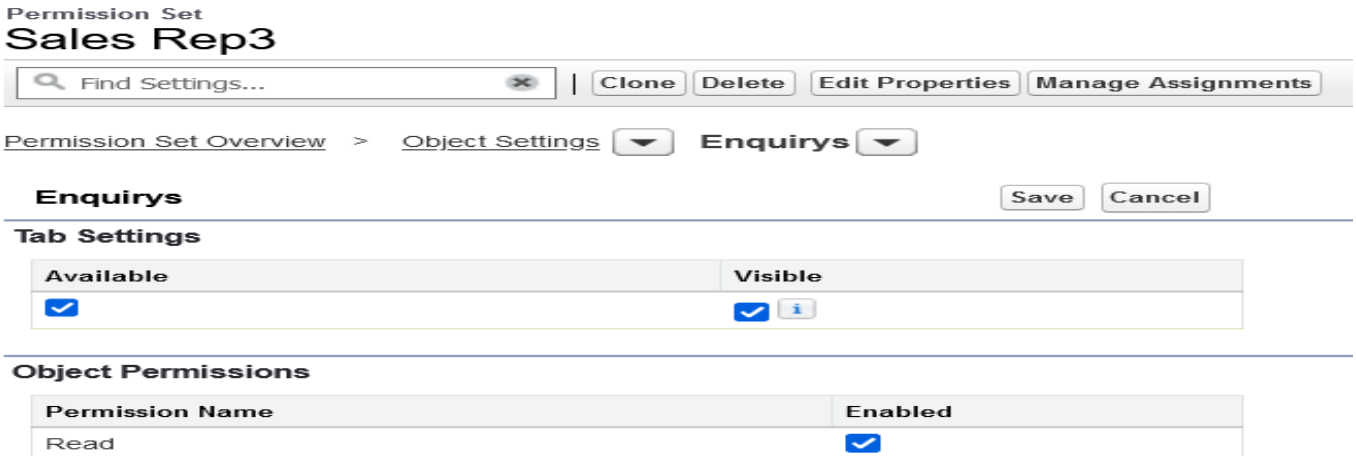



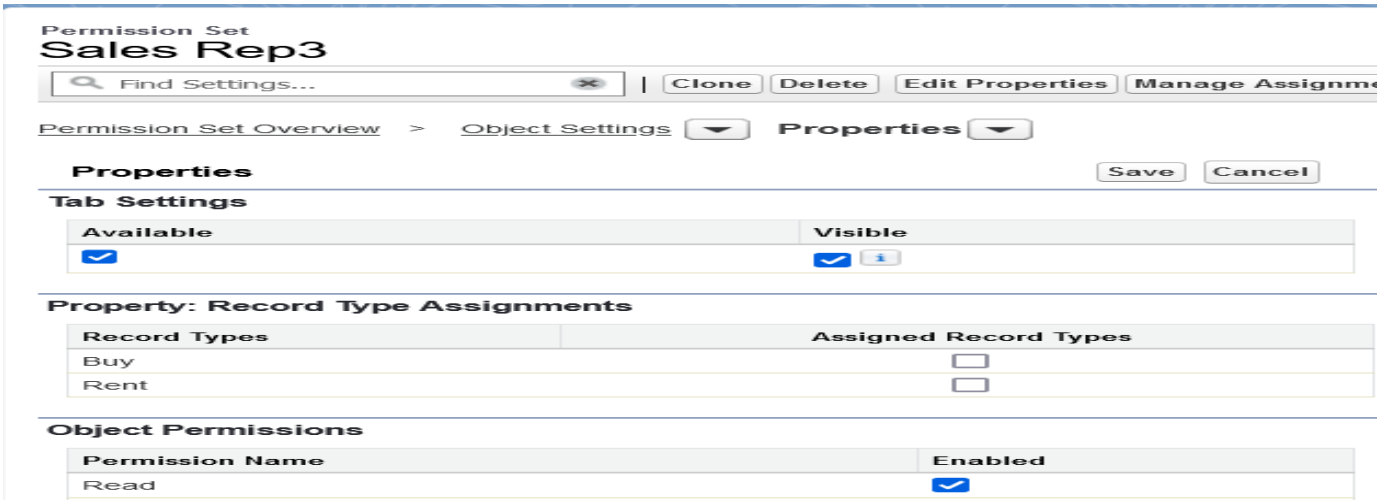



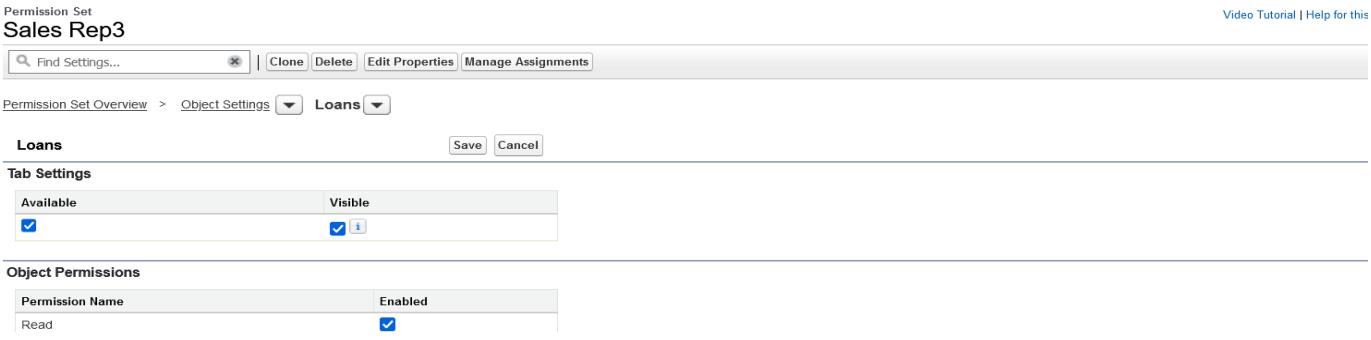
# Property Management Application

Sales Rep 3 Permission set Read Only on Enquiry, Loan, Properties



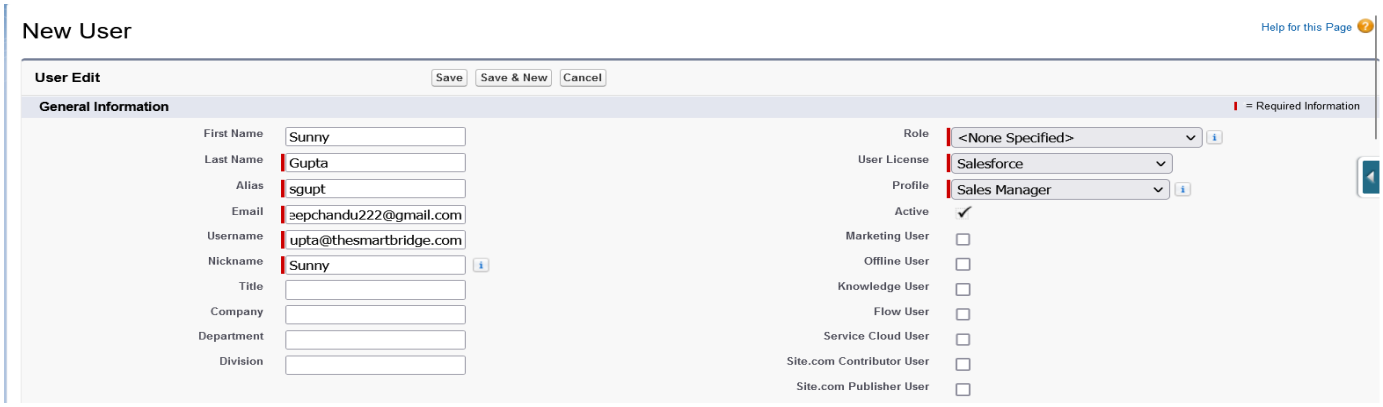



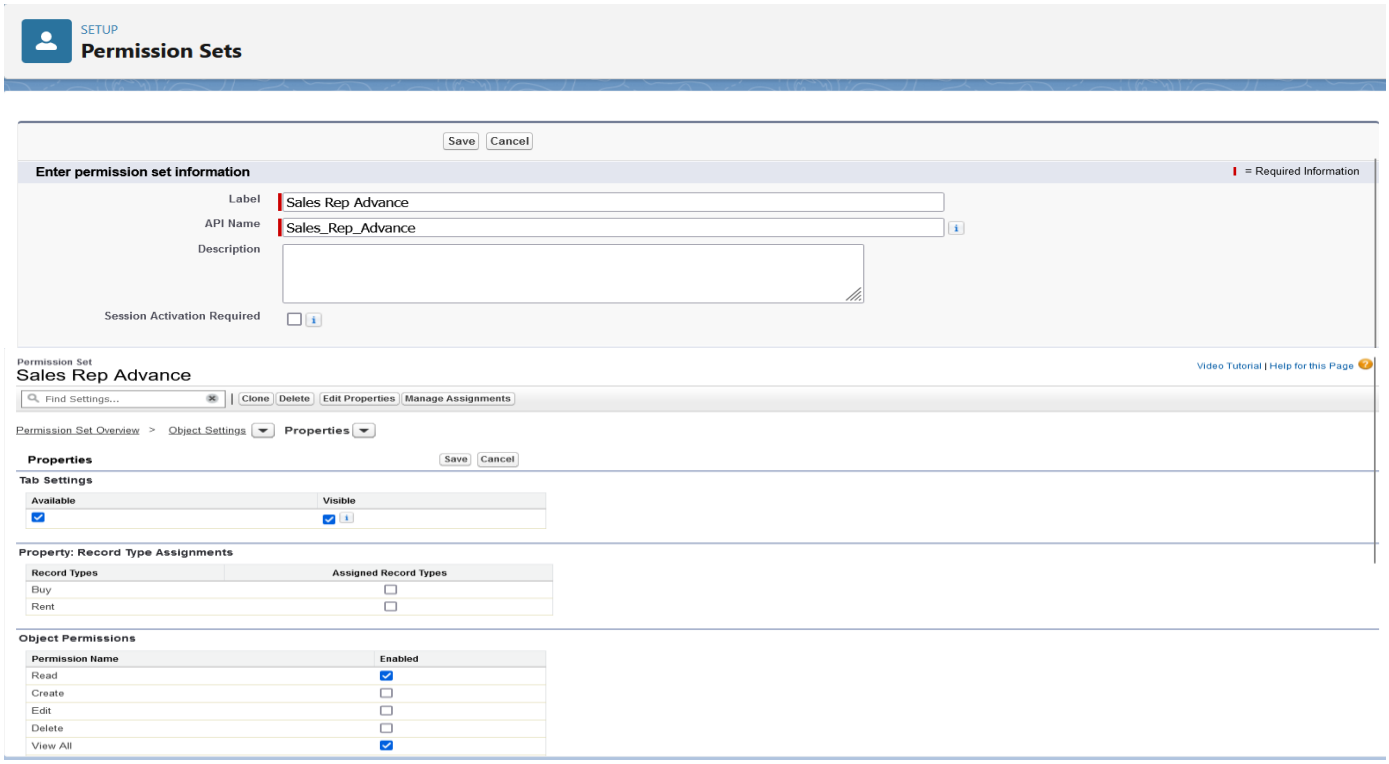



# Property Management Application

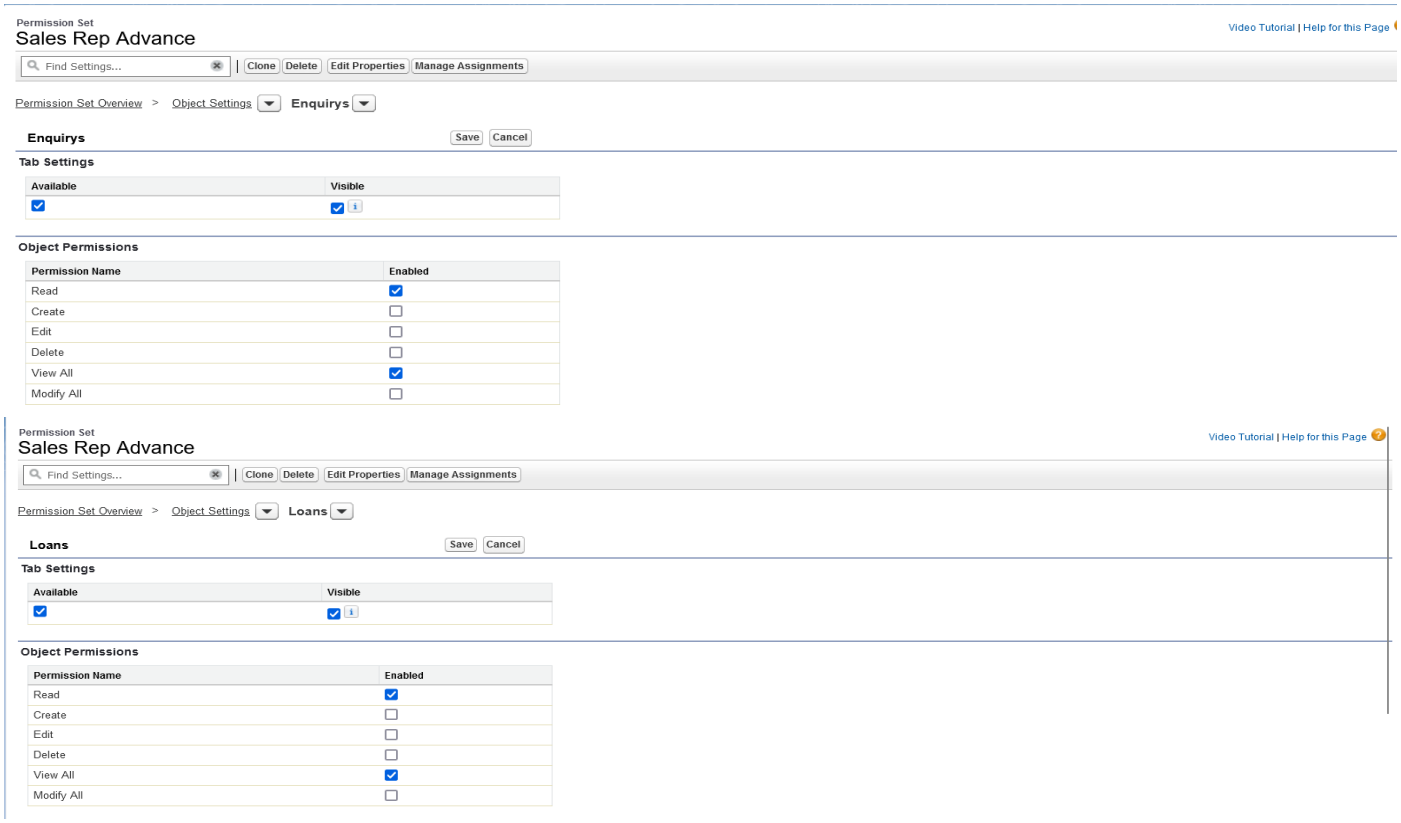
Create a new User

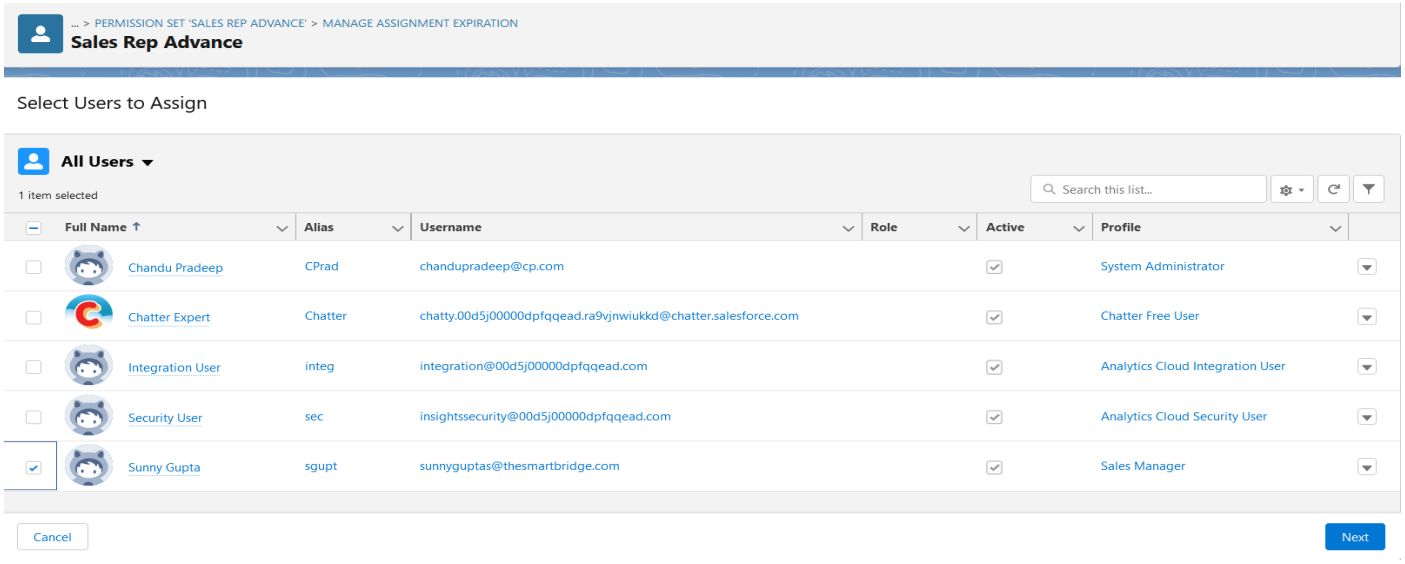



Create a New Permission Set

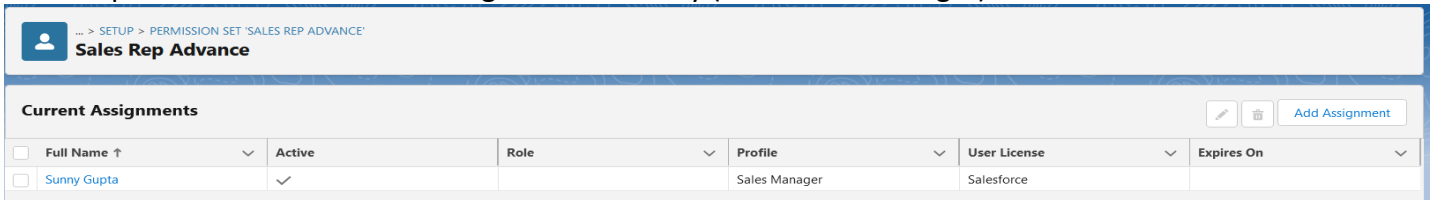


# Property Management Application



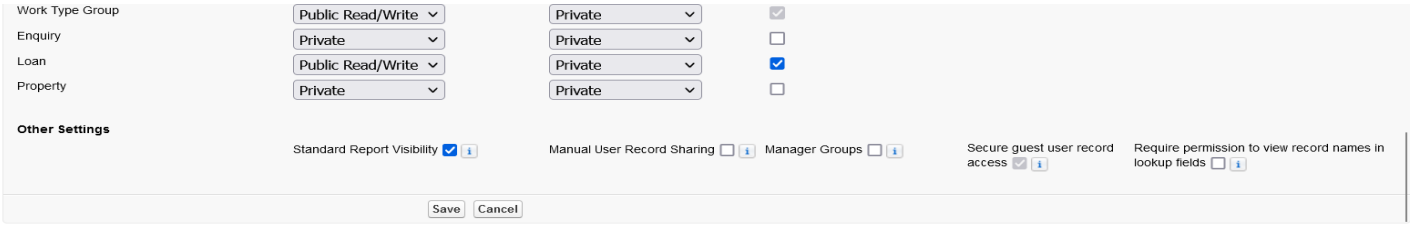




Sales Rep Advance Permission is Assignment to Sunny (Salesforce Manager)



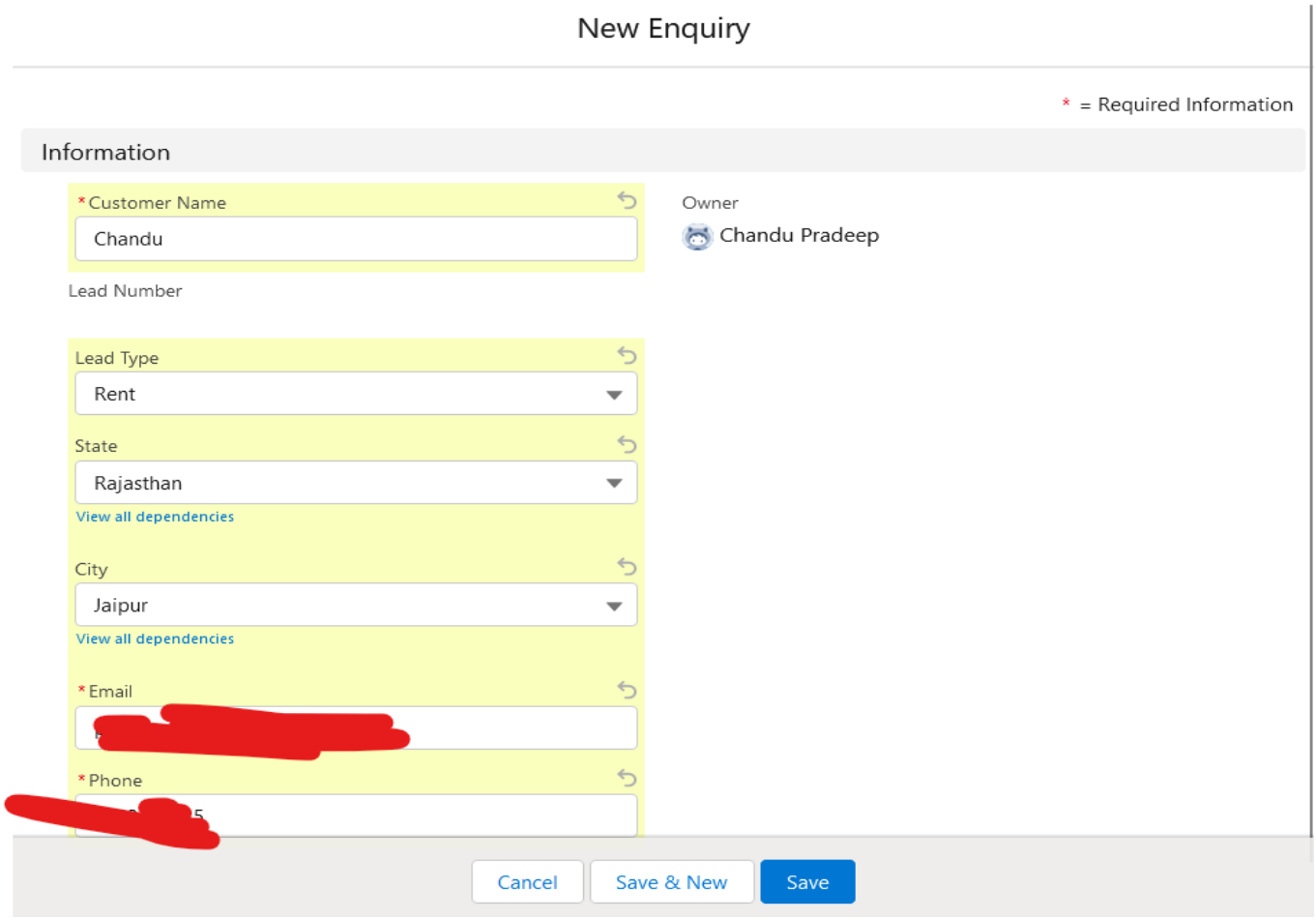
# Property Management Application

Setting Up OWD Rule

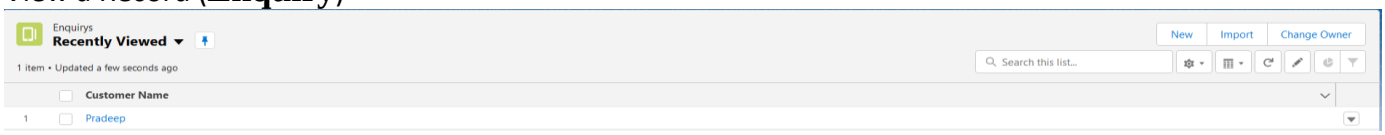



**User Adoption**

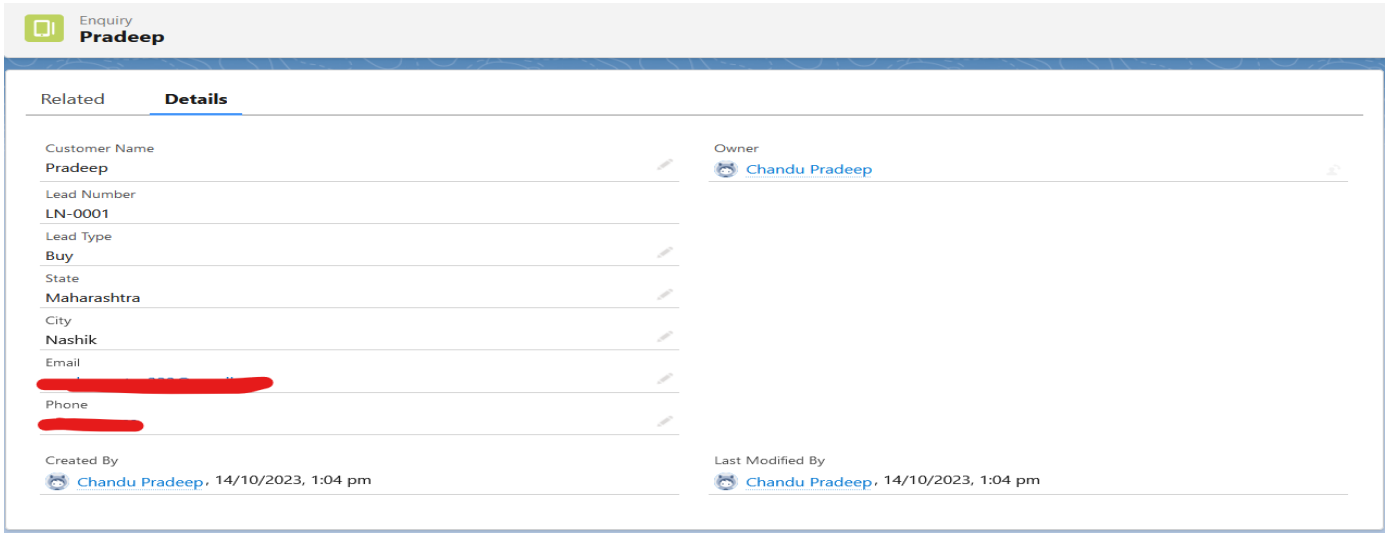
Create a Record (**Enquiry**)



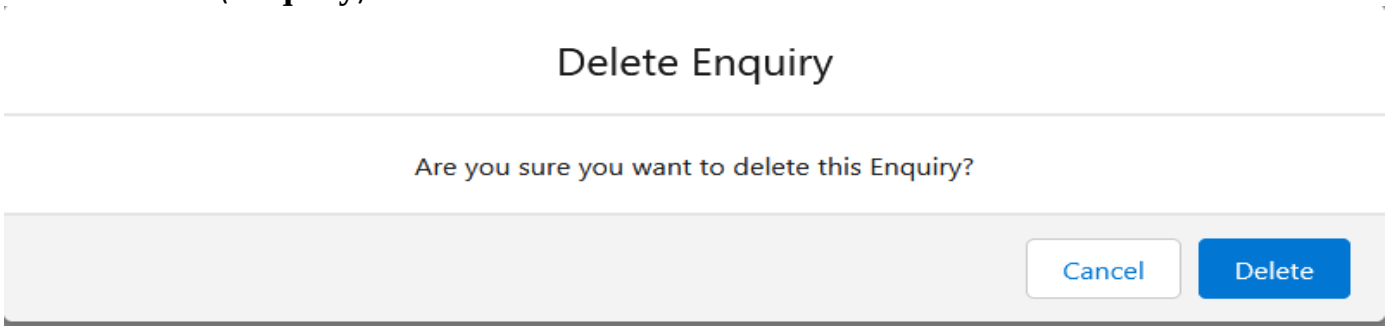

View a Record (**Enquiry**)



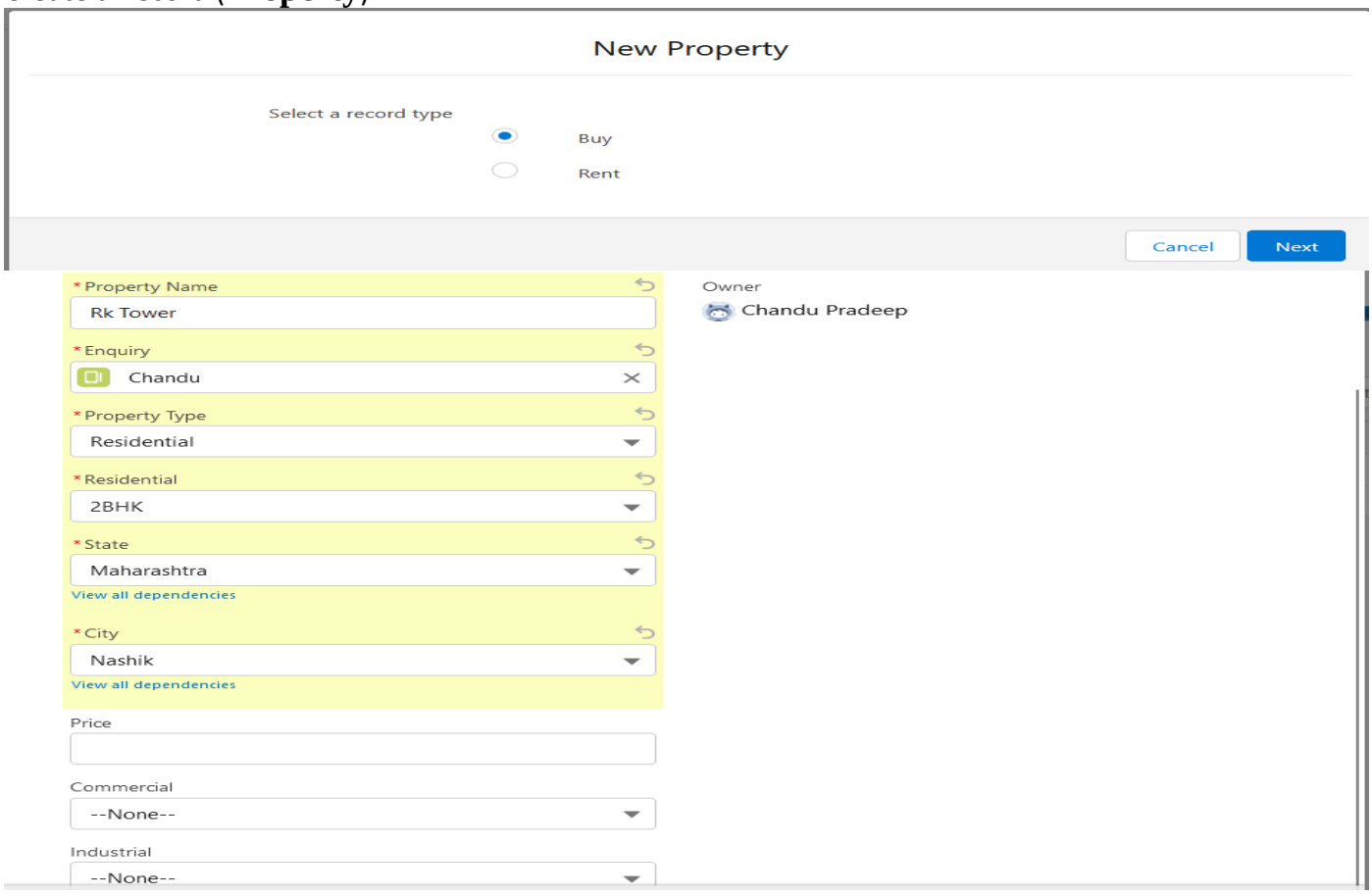
# Property Management Application




Delete a Record (**Enquiry**)

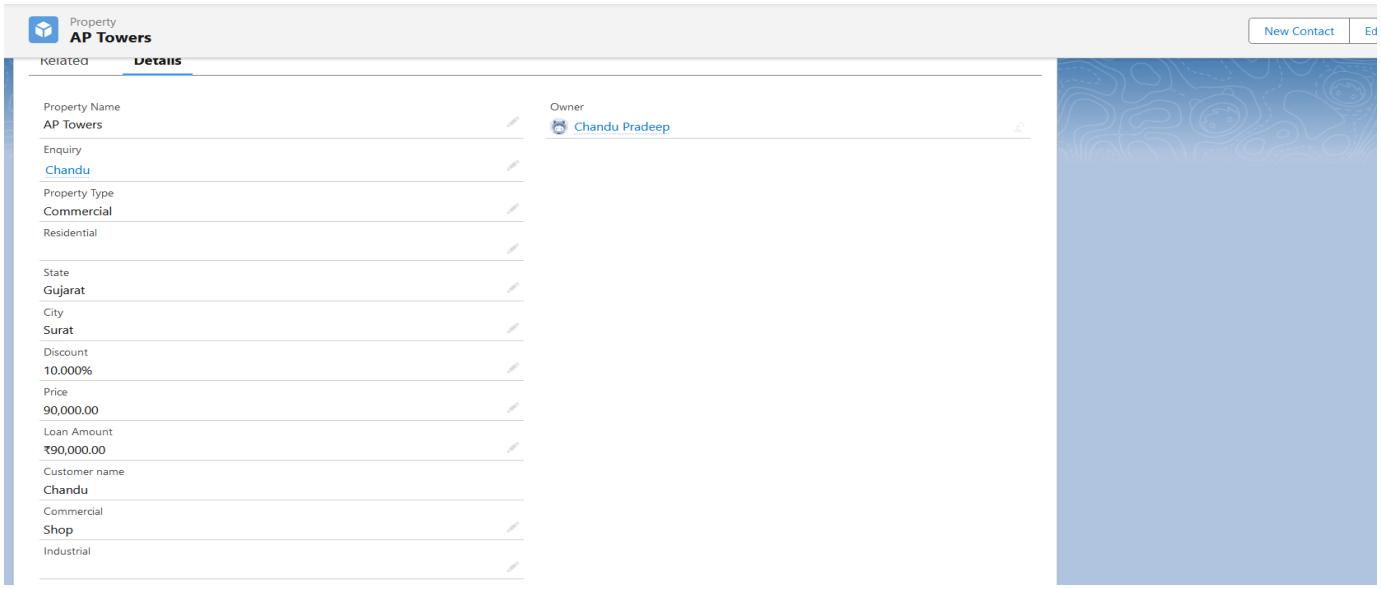



Create a Record (**Property**)

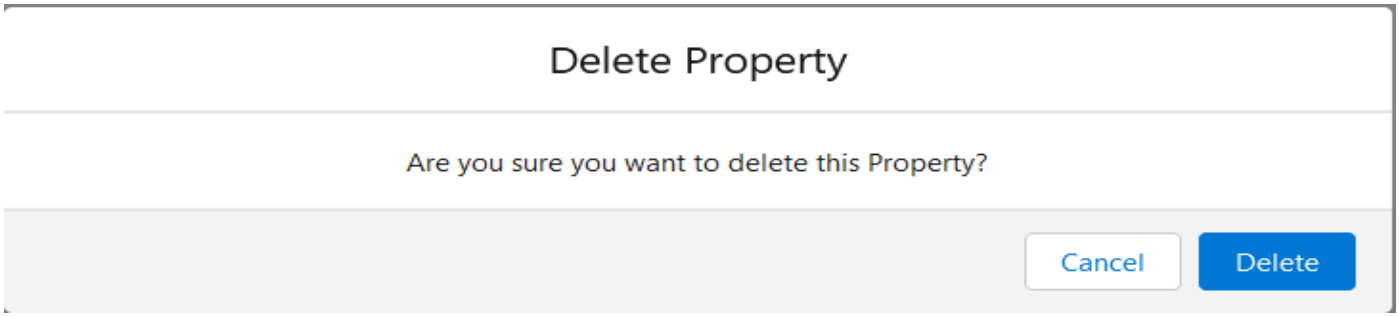


# Property Management Application

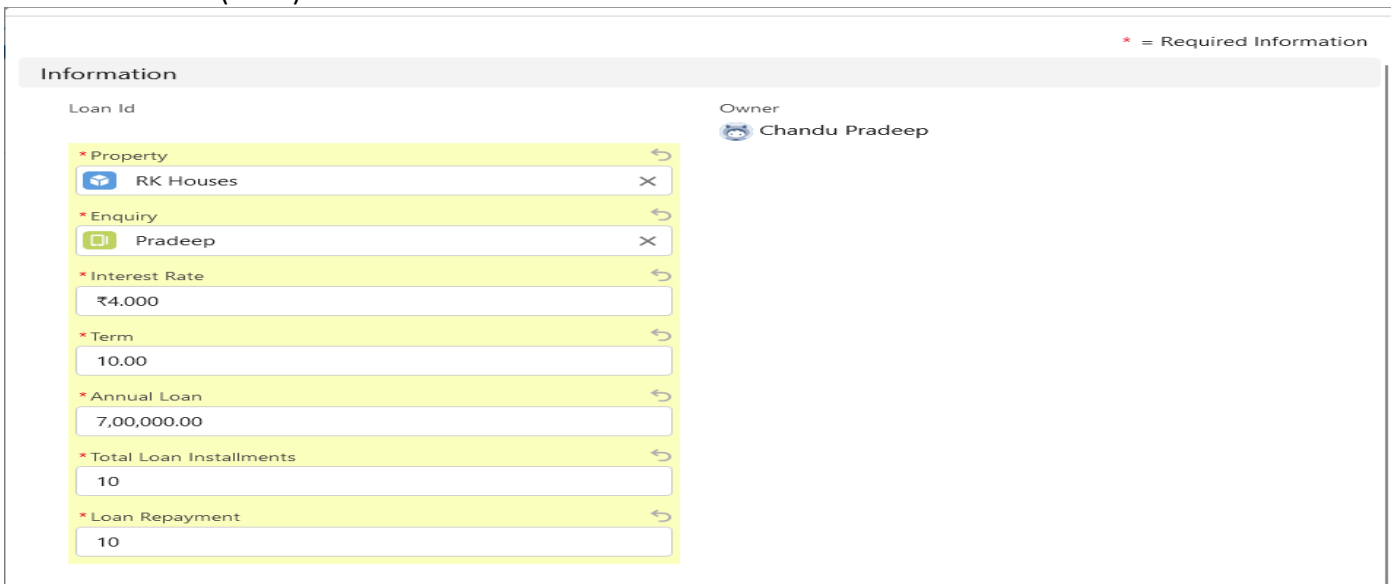
View a Record (**Property**)




Delete a Record (**Property**)

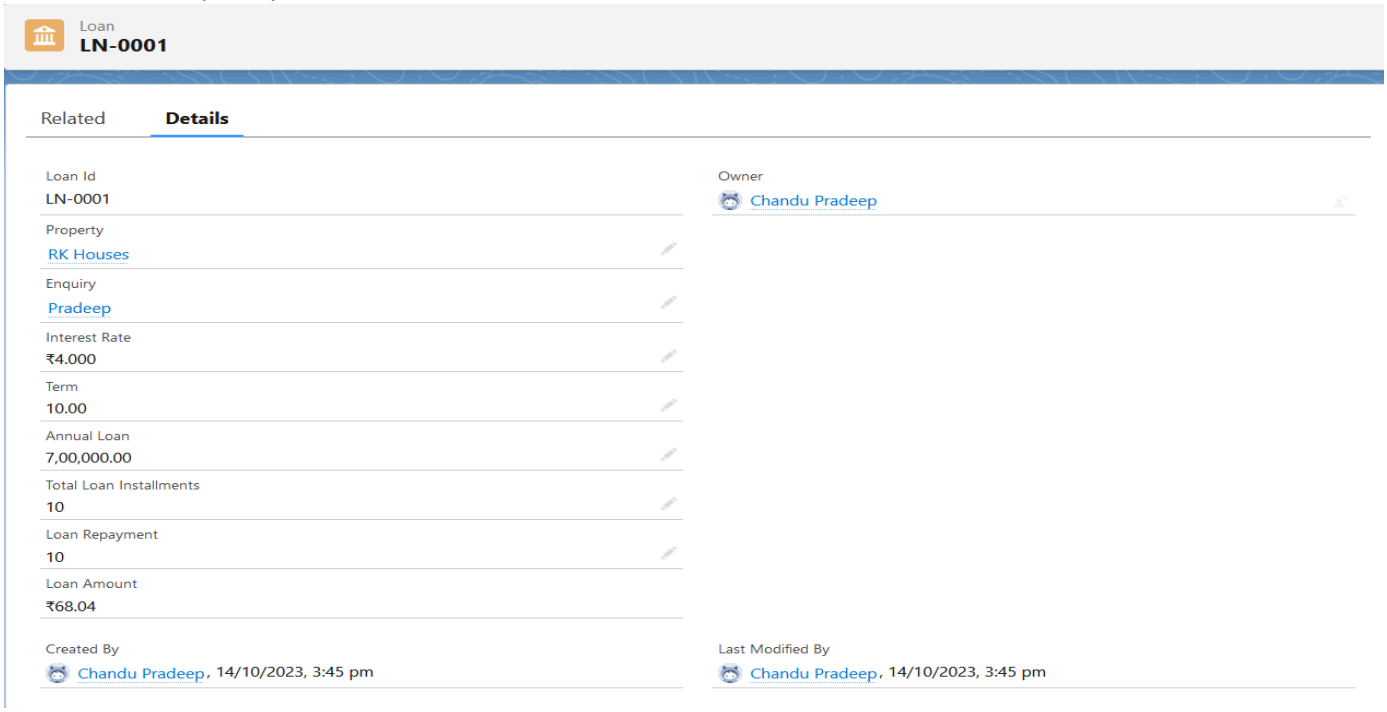



Create a Record (Loan)

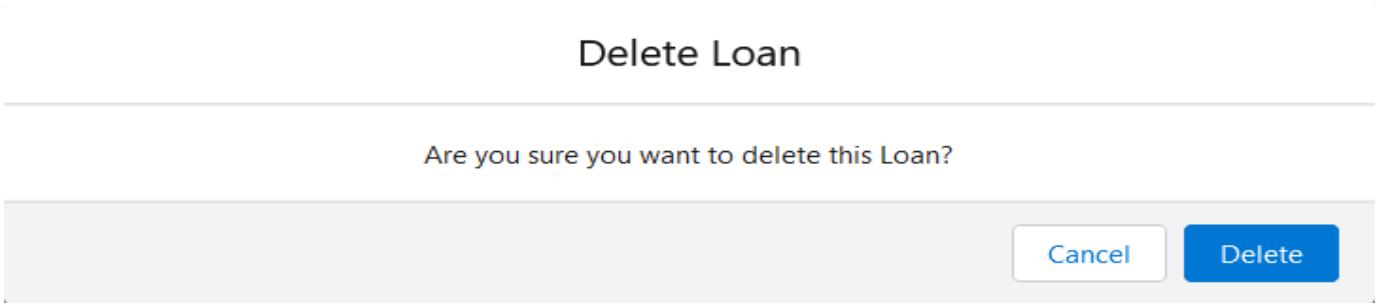


# Property Management Application

View a Record (Loan)

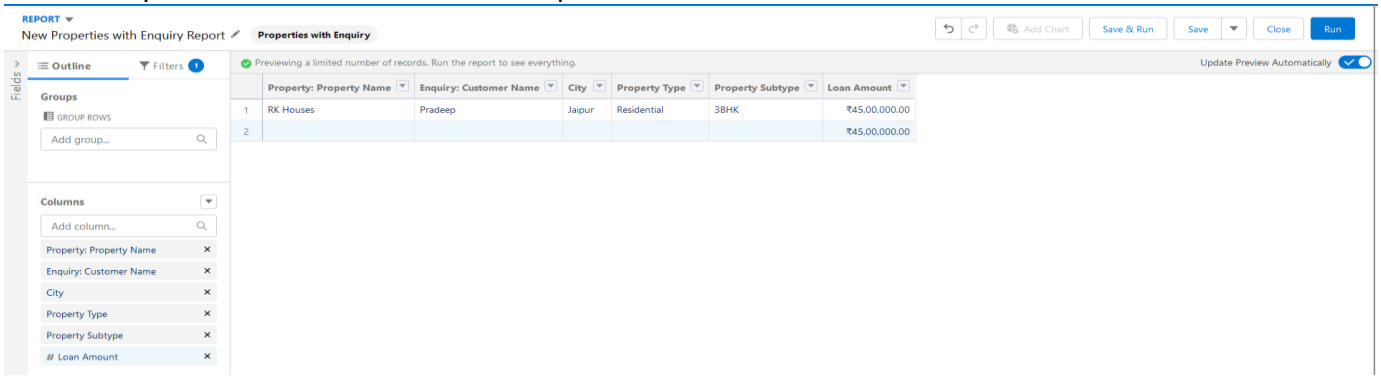



Delete a Record (Loan)

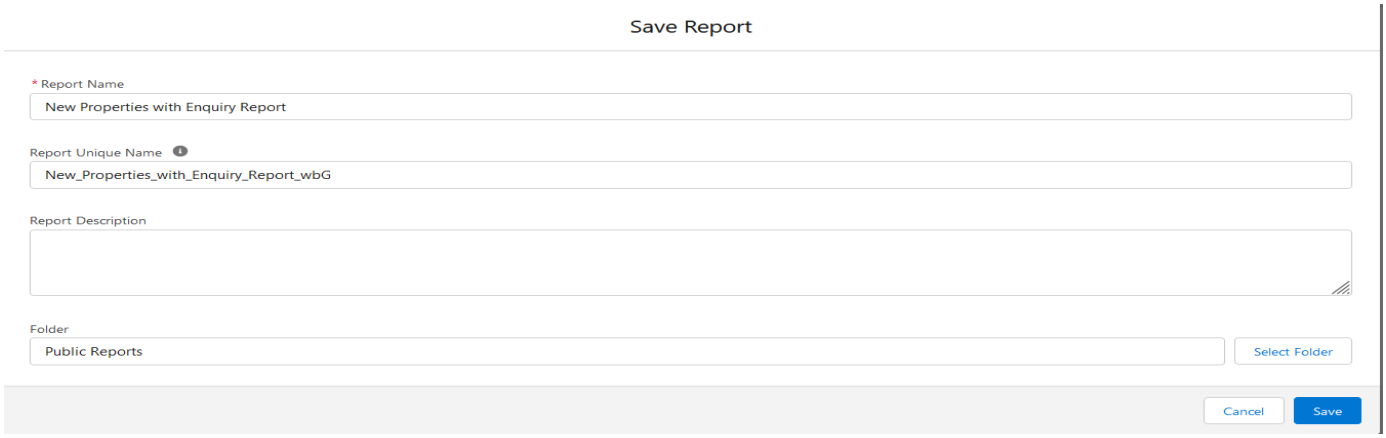


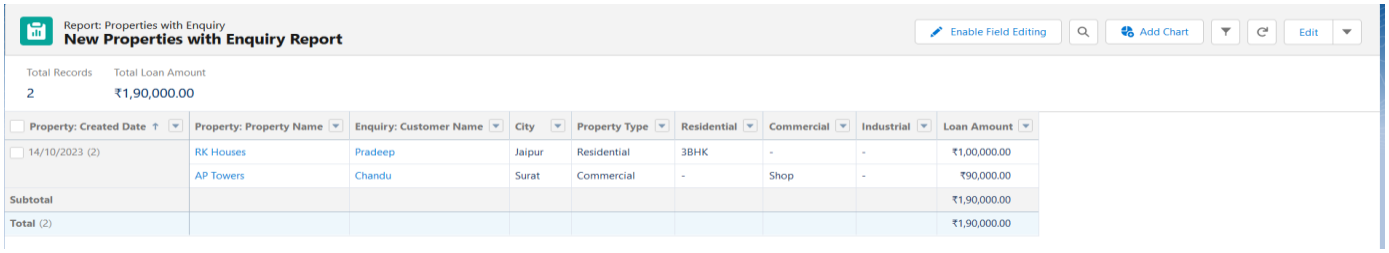

## Reports

Name: Properties with Customer Name Report

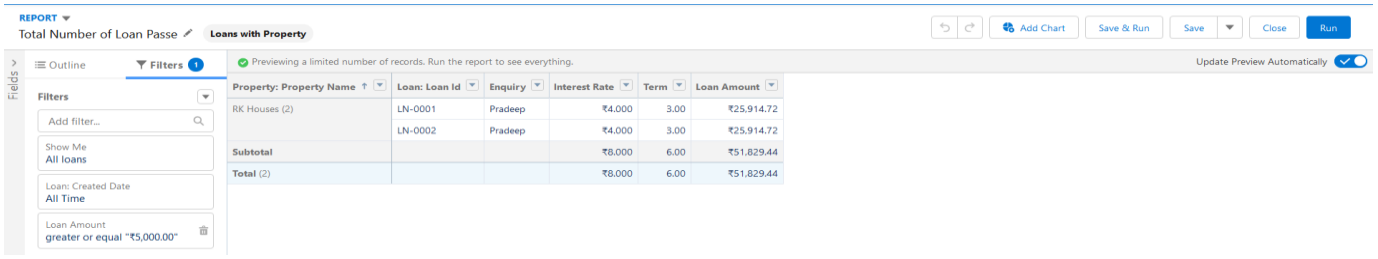


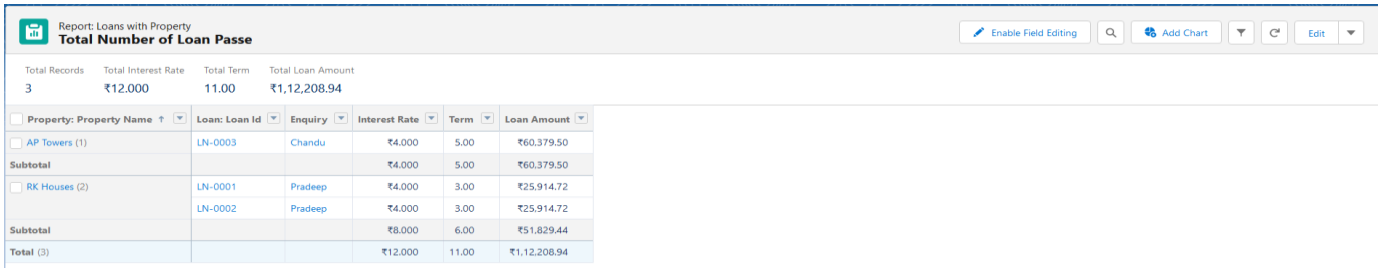
# Property Management Application

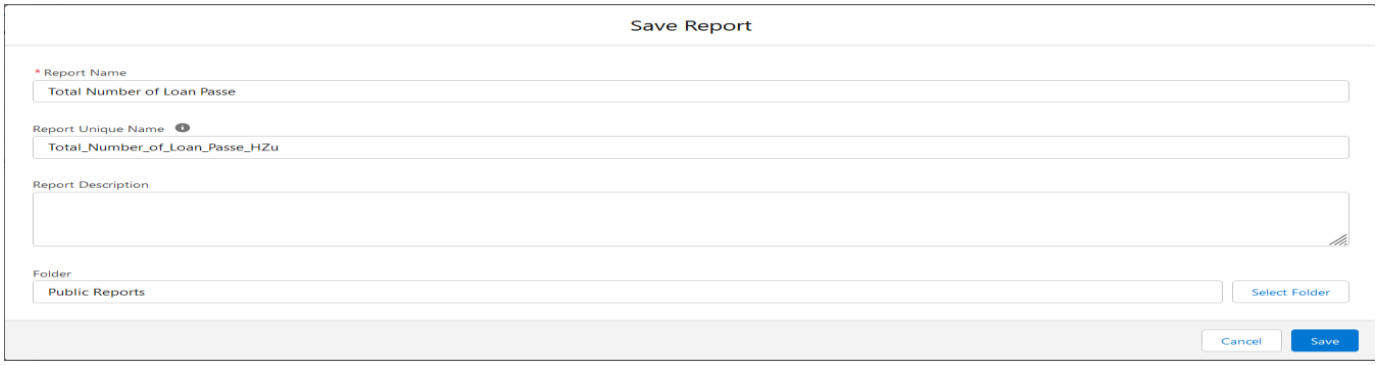



Name: Total Number of Loan Passed



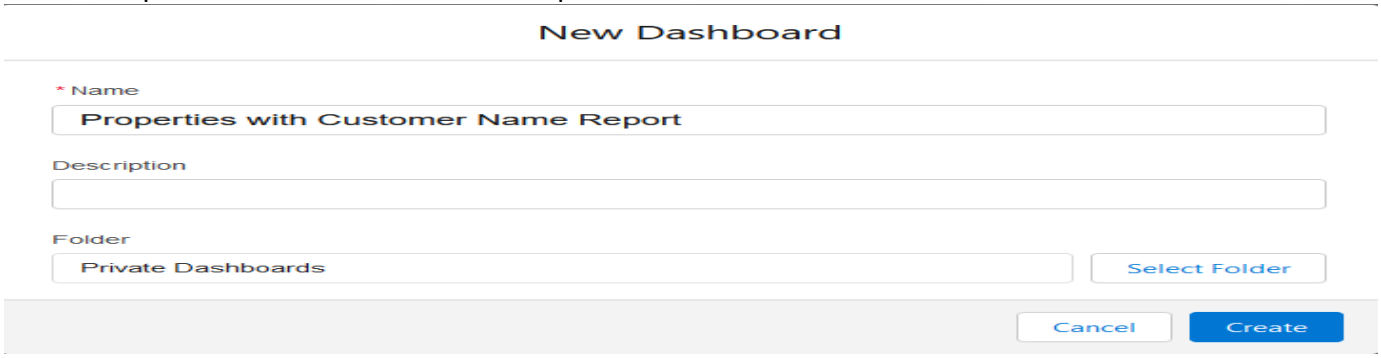



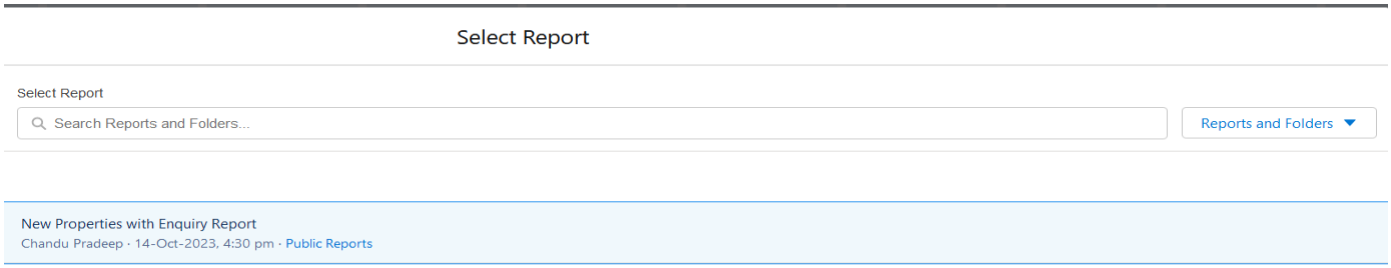



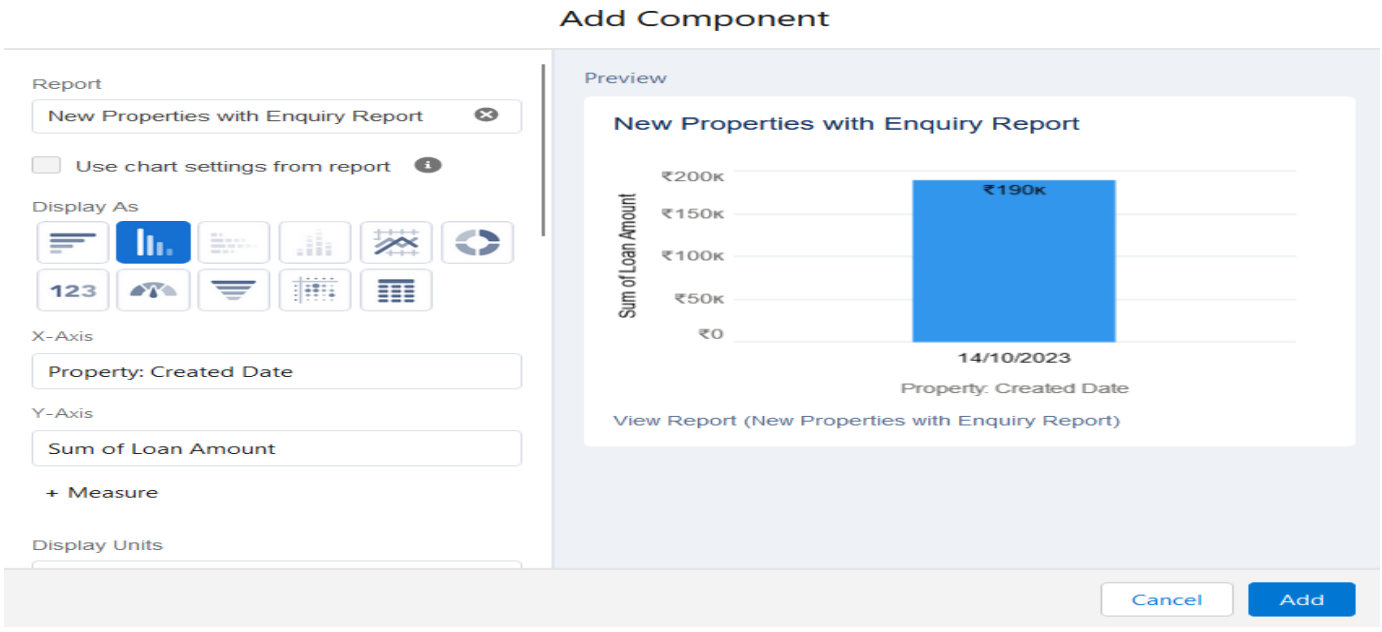
# Property Management Application

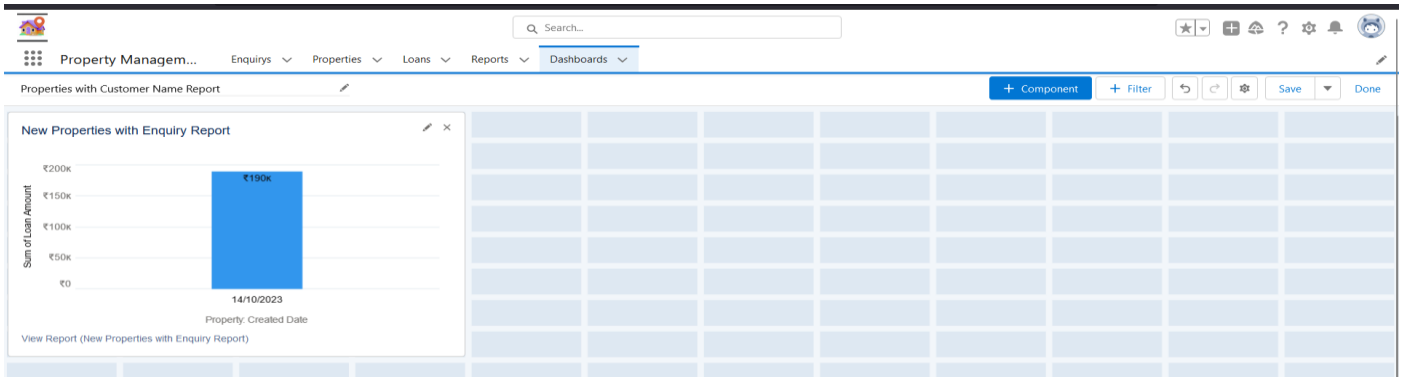
**Dashboards:**

Name: Properties with Customer Name Report



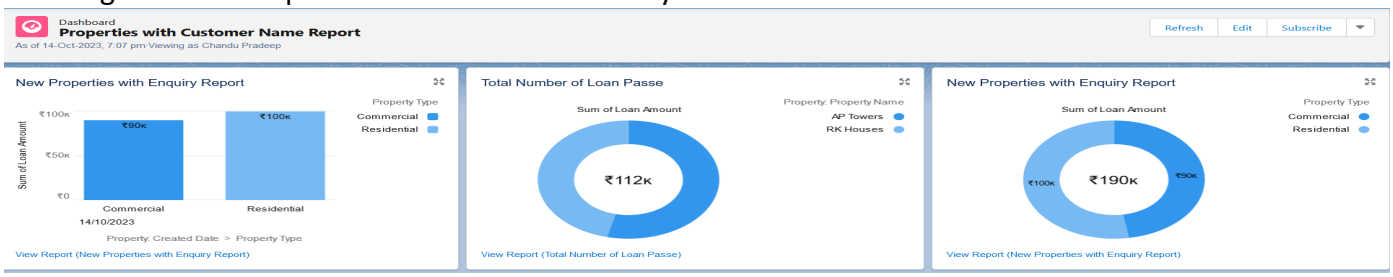



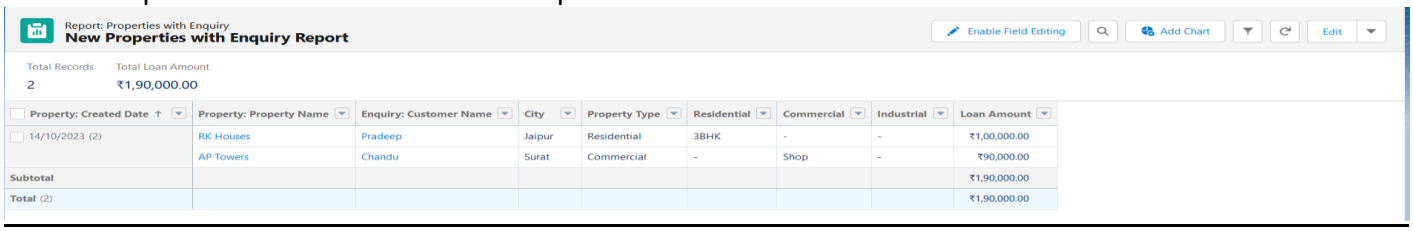
# Property Management Application

Showing the Same Report but in Different Chart Style

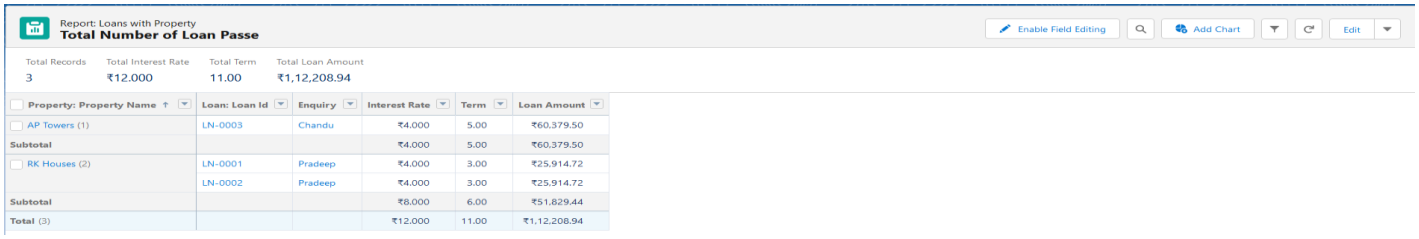



## View Report and Dashboard

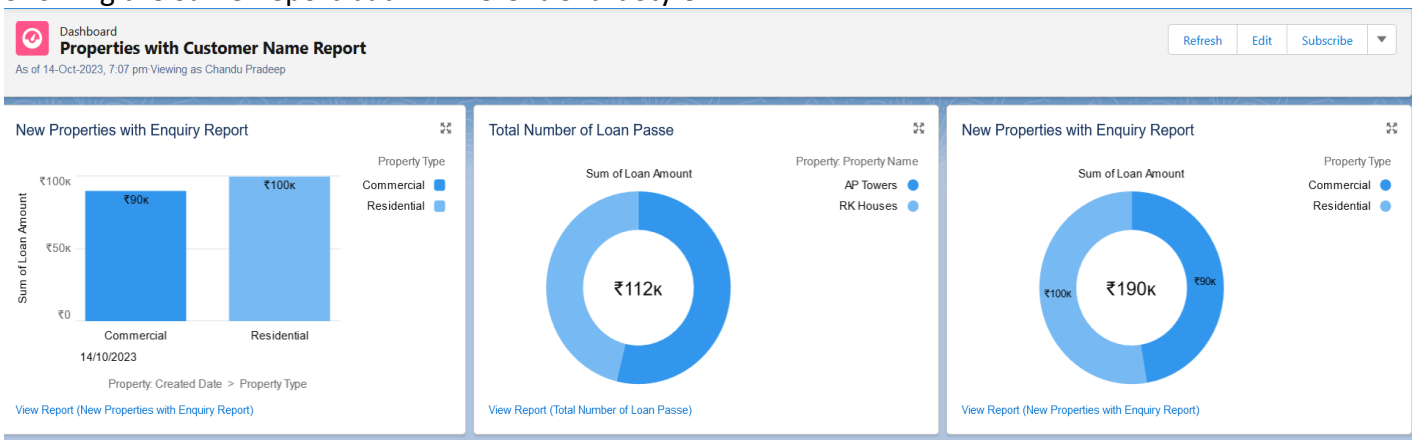
Name: Properties with Customer Name Report




Name: Total Number of Loan Passed

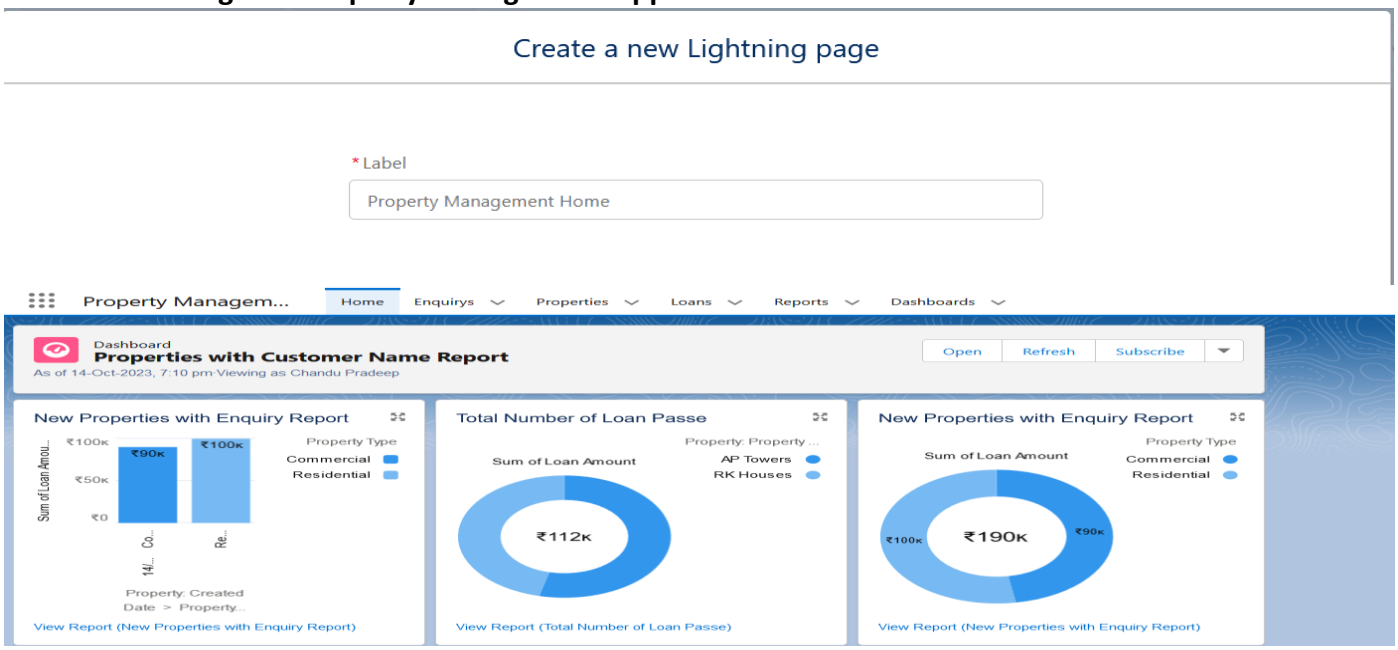



Showing the Same Report but in Different Chart Style



# Property Management Application

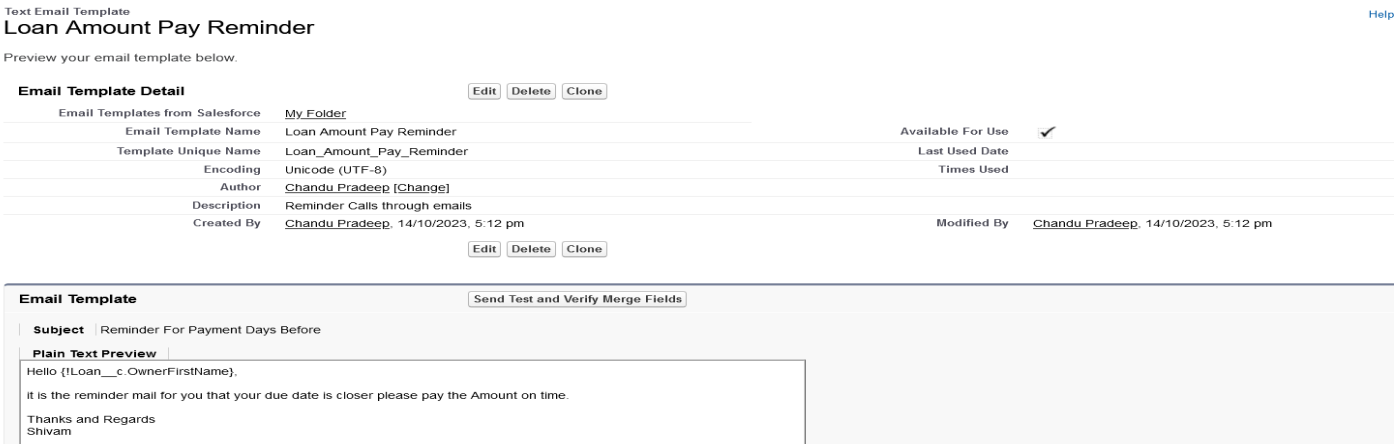
## Create Home Page for Property Management Application



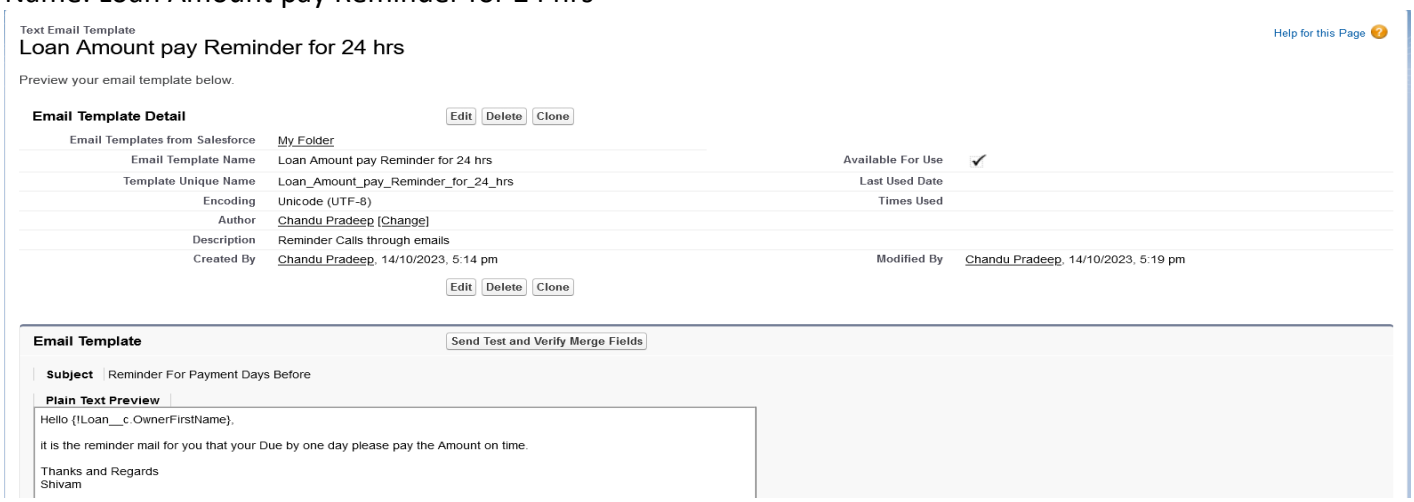

## Flow:

## Classic Email Template

## Name: Loan Amount Pay Reminder

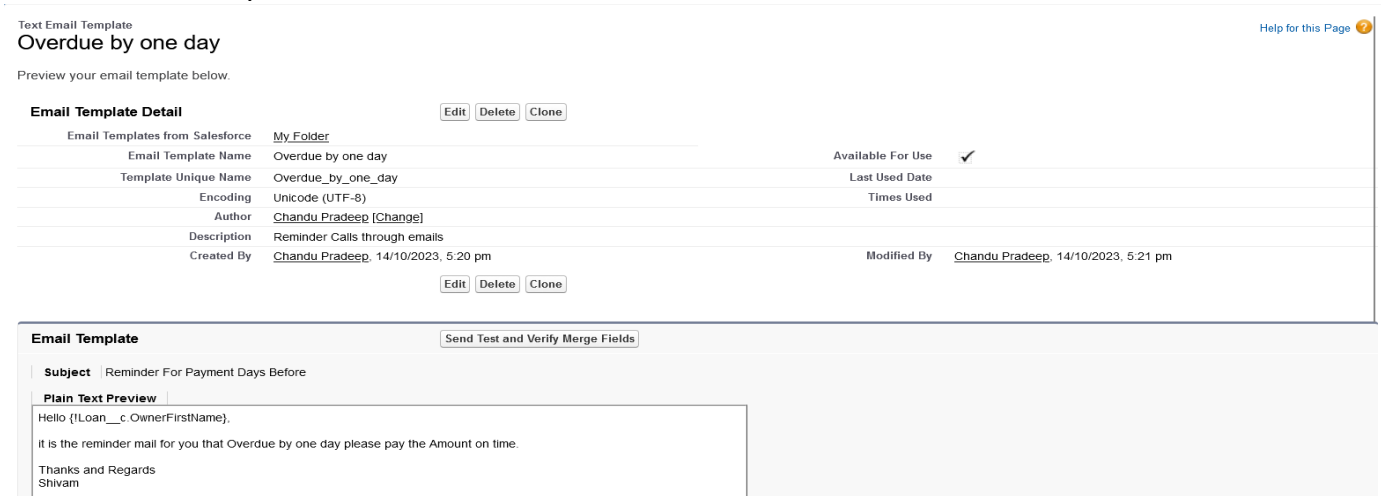



Name: Loan Amount pay Reminder for 24 hrs



# Property Management Application

## Name: Over Due by One Date



Text Email Template

Overdue by one day

Help for this Page

Preview your email template below.

**Email Template Detail** Edit | Delete | Clone

| | | | |
|---|---|---|---|
| Email Templates from Salesforce | My Folder | | |
| Email Template Name | Overdue by one day | Available For Use | ✓ |
| Template Unique Name | Overdue_by_one_day | Last Used Date | |
| Encoding | Unicode (UTF-8) | Times Used | |
| Author | Chandu Pradeep [Change] | | |
| Description | Reminder Calls through emails | | |
| Created By | Chandu Pradeep, 14/10/2023, 5:20 pm | Modified By | Chandu Pradeep, 14/10/2023, 5:21 pm |

Edit | Delete | Clone

**Email Template** Send Test and Verify Merge Fields

**Subject** Reminder For Payment Days Before

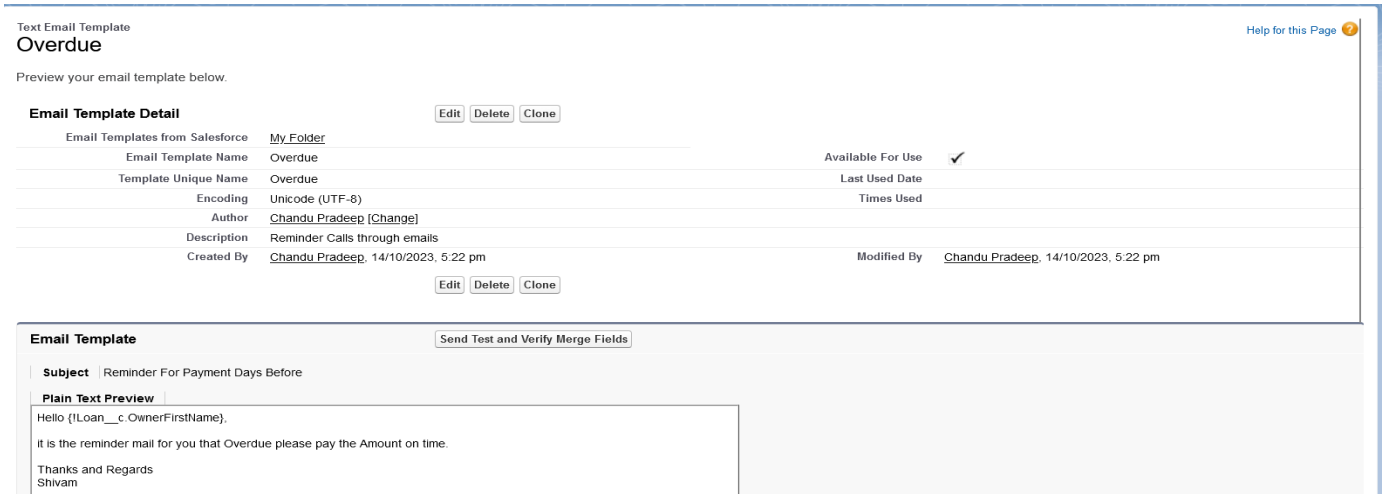
**Plain Text Preview**

Hello {!Loan__c.OwnerFirstName},

it is the reminder mail for you that Overdue by one day please pay the Amount on time.

Thanks and Regards
Shivam

## Name: Over Due



Text Email Template

Overdue

Help for this Page

Preview your email template below.

**Email Template Detail** Edit | Delete | Clone

| | | | |
|---|---|---|---|
| Email Templates from Salesforce | My Folder | | |
| Email Template Name | Overdue | Available For Use | ✓ |
| Template Unique Name | Overdue | Last Used Date | |
| Encoding | Unicode (UTF-8) | Times Used | |
| Author | Chandu Pradeep [Change] | | |
| Description | Reminder Calls through emails | | |
| Created By | Chandu Pradeep, 14/10/2023, 5:22 pm | Modified By | Chandu Pradeep, 14/10/2023, 5:22 pm |

Edit | Delete | Clone

**Email Template** Send Test and Verify Merge Fields

**Subject** Reminder For Payment Days Before

**Plain Text Preview**

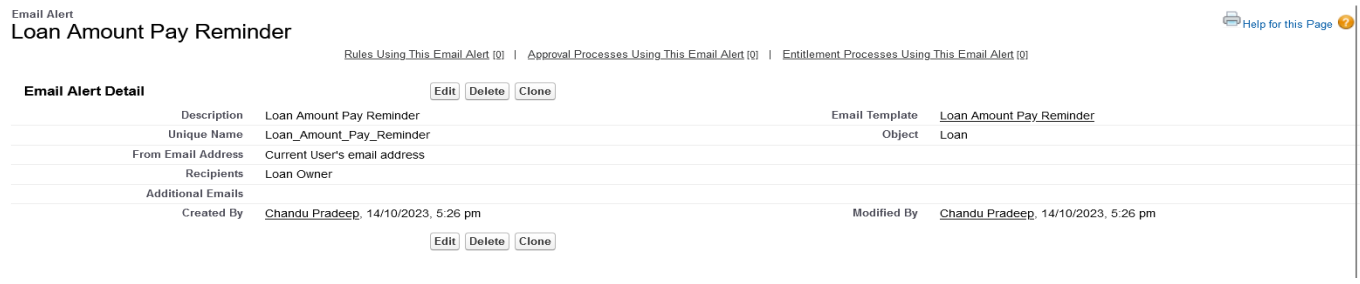
Hello {!Loan__c.OwnerFirstName},

it is the reminder mail for you that Overdue please pay the Amount on time.

Thanks and Regards
Shivam

## Email Alerts

## Name: Loan Amount Pay Reminder



Email Alert

Loan Amount Pay Reminder

Help for this Page

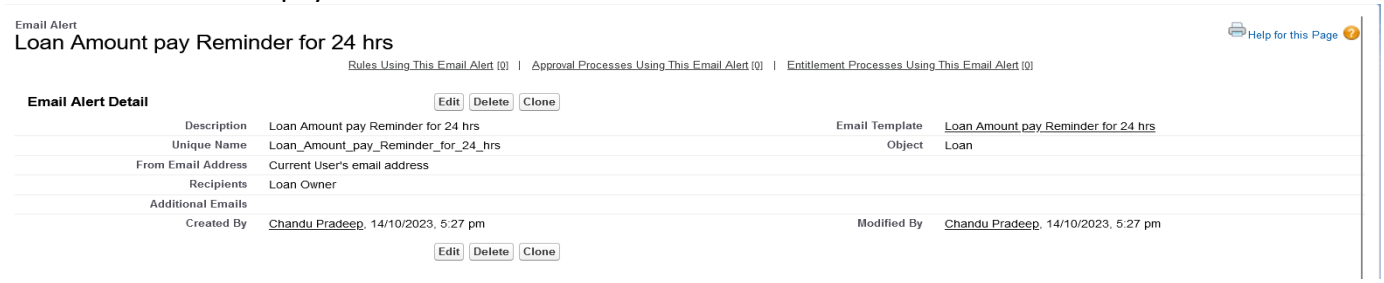
Rules Using This Email Alert [0] | Approval Processes Using This Email Alert [0] | Entitlement Processes Using This Email Alert [0]

**Email Alert Detail** Edit | Delete | Clone

| | | | |
|---|---|---|---|
| Description | Loan Amount Pay Reminder | Email Template | Loan Amount Pay Reminder |
| Unique Name | Loan_Amount_Pay_Reminder | Object | Loan |
| From Email Address | Current User's email address | | |
| Recipients | Loan Owner | | |
| Additional Emails | | | |
| Created By | Chandu Pradeep, 14/10/2023, 5:26 pm | Modified By | Chandu Pradeep, 14/10/2023, 5:26 pm |

Edit | Delete | Clone

## Name: Loan Amount pay Reminder for 24 hrs



Email Alert

Loan Amount pay Reminder for 24 hrs

Help for this Page

Rules Using This Email Alert [0] | Approval Processes Using This Email Alert [0] | Entitlement Processes Using This Email Alert [0]

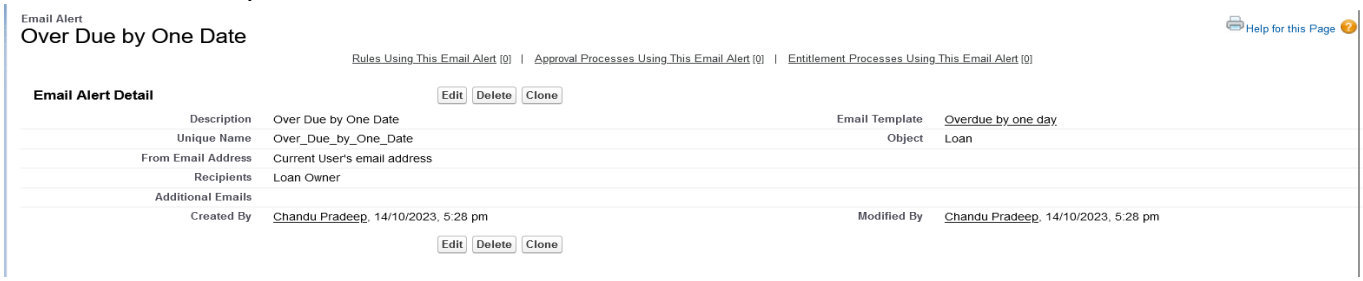
**Email Alert Detail** Edit | Delete | Clone

| | | | |
|---|---|---|---|
| Description | Loan Amount pay Reminder for 24 hrs | Email Template | Loan Amount pay Reminder for 24 hrs |
| Unique Name | Loan_Amount_pay_Reminder_for_24_hrs | Object | Loan |
| From Email Address | Current User's email address | | |
| Recipients | Loan Owner | | |
| Additional Emails | | | |
| Created By | Chandu Pradeep, 14/10/2023, 5:27 pm | Modified By | Chandu Pradeep, 14/10/2023, 5:27 pm |

Edit | Delete | Clone

# Property Management Application

## Name: Over Due by One Date



Email Alert

Over Due by One Date

Help for this Page

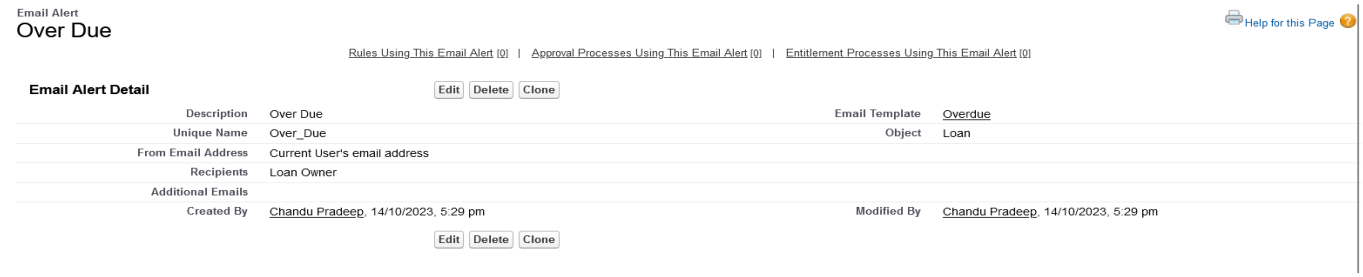
Rules Using This Email Alert [0] | Approval Processes Using This Email Alert [0] | Entitlement Processes Using This Email Alert [0]

**Email Alert Detail** Edit Delete Clone

| | | | |
|---|---|---|---|
| Description | Over Due by One Date | Email Template | Overdue by one day |
| Unique Name | Over_Due_by_One_Date | Object | Loan |
| From Email Address | Current User's email address | | |
| Recipients | Loan Owner | | |
| Additional Emails | | | |
| Created By | Chandu Pradeep, 14/10/2023, 5:28 pm | Modified By | Chandu Pradeep, 14/10/2023, 5:28 pm |

Edit Delete Clone

## Name: Over Due



Email Alert

Over Due

Help for this Page

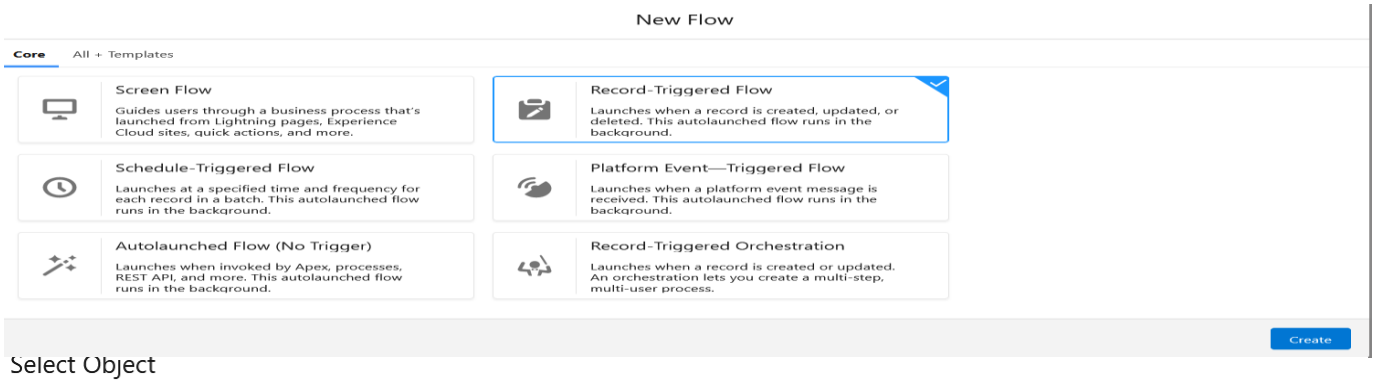
Rules Using This Email Alert [0] | Approval Processes Using This Email Alert [0] | Entitlement Processes Using This Email Alert [0]

**Email Alert Detail** Edit Delete Clone

| | | | |
|---|---|---|---|
| Description | Over Due | Email Template | Overdue |
| Unique Name | Over_Due | Object | Loan |
| From Email Address | Current User's email address | | |
| Recipients | Loan Owner | | |
| Additional Emails | | | |
| Created By | Chandu Pradeep, 14/10/2023, 5:29 pm | Modified By | Chandu Pradeep, 14/10/2023, 5:29 pm |

Edit Delete Clone

## Flow: Record Trigger Flow Name: Loan Payment Remainder



New Flow

Core All + Templates

**Screen Flow**
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.

**Record-Triggered Flow**
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

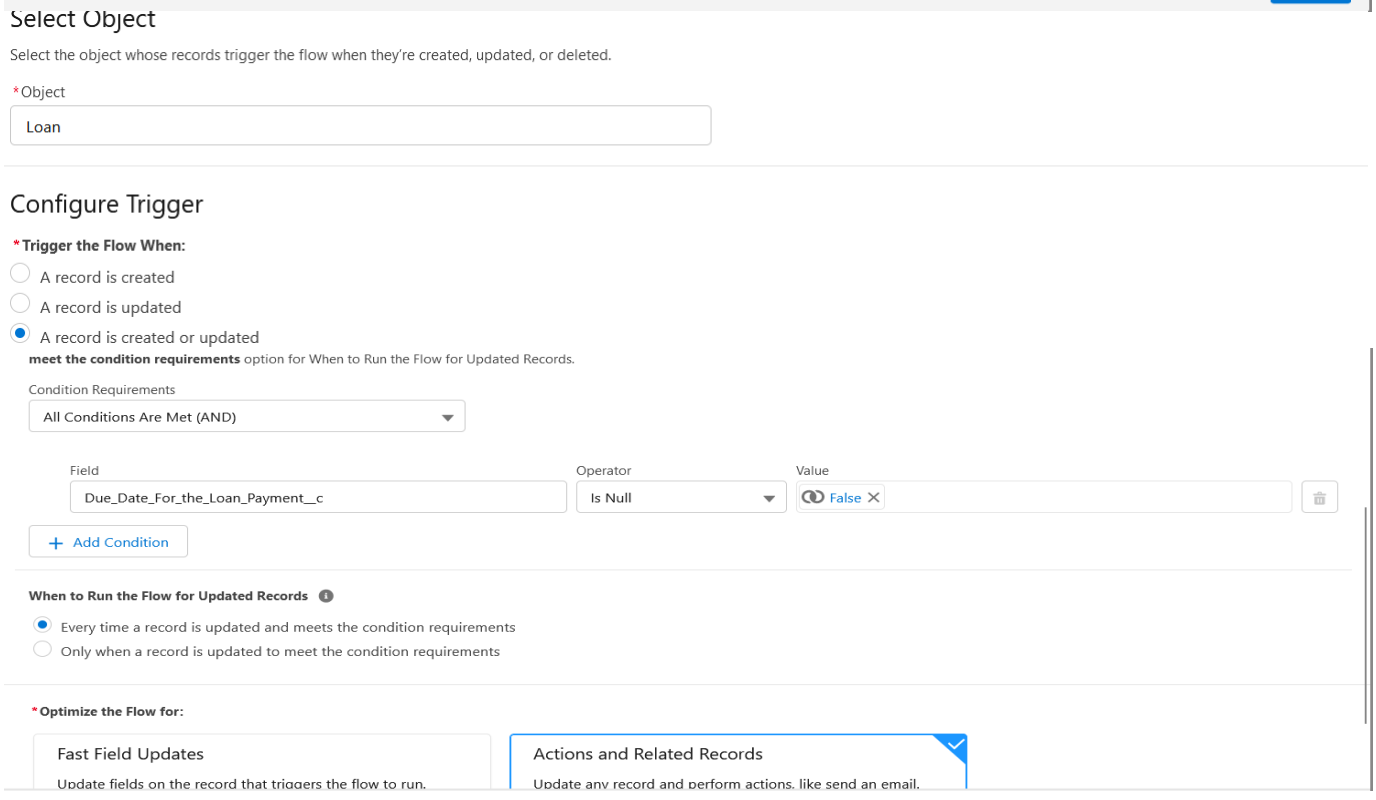
**Schedule-Triggered Flow**
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

**Platform Event—Triggered Flow**
Launches when a platform event message is received. This autolaunched flow runs in the background.

**Autolaunched Flow (No Trigger)**
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

**Record-Triggered Orchestration**
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

Create



Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object

Loan

Configure Trigger

*Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated

**meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

| Field | Operator | Value |
|---|---|---|
| Due_Date_For_the_Loan_Payment__c | Is Null | False |

+ Add Condition

When to Run the Flow for Updated Records

- Every time a record is updated and meets the condition requirements
- Only when a record is updated to meet the condition requirements

*Optimize the Flow for:

Fast Field Updates
Update fields on the record that triggers the flow to run.

Actions and Related Records
Update any record and perform actions, like send an email.

# Property Management Application

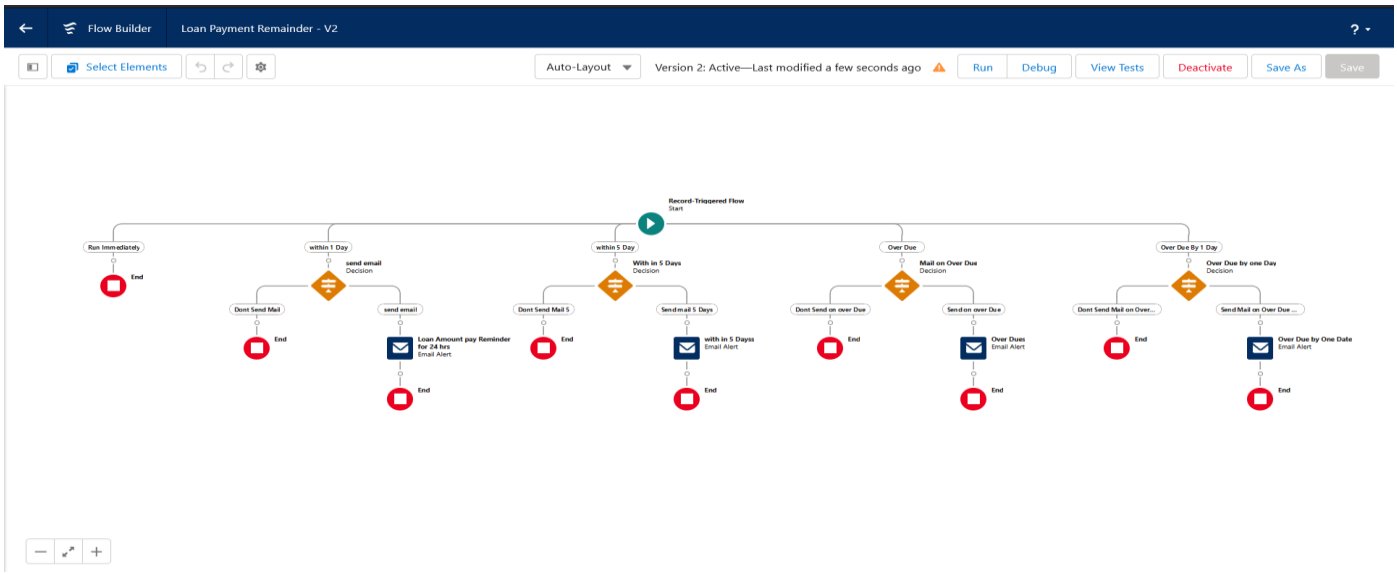
## Configure Scheduled Paths

Add a scheduled path if you want a flow path to run a certain amount of time after the triggering record is created or updated. That time can be based on the triggering event or on a specified date or date/time field in the record. A separate flow interview runs for each scheduled path. Each scheduled path interview is queued to run at the scheduled time, but can be delayed until system resources become available. Path labels appear on connectors in the canvas.

SCHEDULED PATH DETAILS

Delete Path

* Path Label: within 1 Day
* API Name: within_1_Day
* Time Source: Loan__c: Due Date For the Loan Payment
* Offset Number: 24
* Offset Options: Hours After




## Save as

A New Version | A New Flow

* Flow Label: Loan Payment Remainder
* Flow API Name: Loan_Payment_Remainder

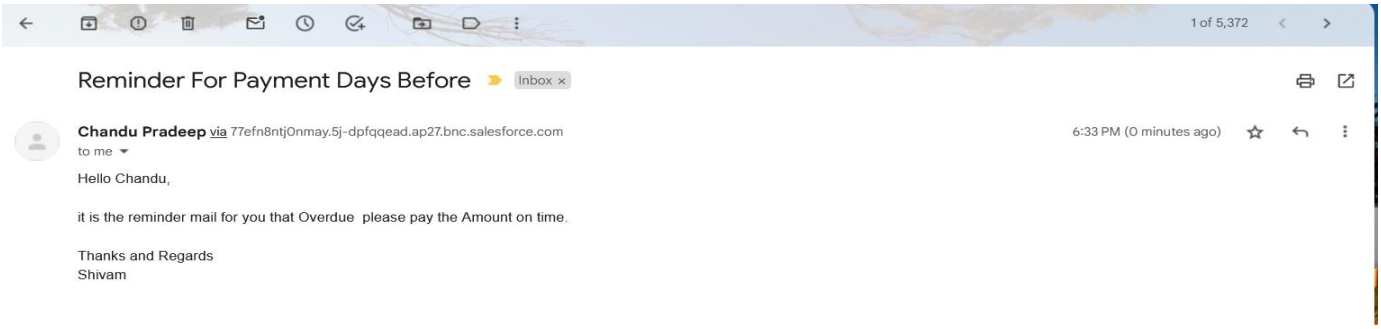
Description

Show Advanced

Cancel | Save

# Property Management Application

Email Received:



Reminder For Payment Days Before Inbox ×

1 of 5,372

**Chandu Pradeep** via 77efn8ntj0nmay.5j-dpfqqead.ap27.bnc.salesforce.com
to me
6:33 PM (0 minutes ago)

Hello Chandu,

it is the reminder mail for you that Overdue please pay the Amount on time.

Thanks and Regards
Shivam

Apex Trigger:

Trigger: propTrigger

propTrigger.apxt | propClass.apxc | propClassTest.apxc

Code Coverage: All Tests 100% | API Version: 58 | Go To

```
trigger propTrigger on Property__c (before insert,before Update) {
    if(Trigger.isBefore){
        if(Trigger.isUpdate){
            propClass.propMethod(Trigger.New);
        }
        if(Trigger.isInsert){
            propClass.propMethod(Trigger.New);
        }
    }
}
```

Trigger Helper Class: propClass

propTrigger.apxt | propClass.apxc | propClassTest.apxc

Code Coverage: All Tests 100% | API Version: 58 | Go To

```
public class propClass {
    public static void propMethod(List<Property__c> propVar){
        for(Property__c pp : propVar){
            if(pp.Property_Type__c =='Residential'){
                pp.Commercial__c='Shop';
            }
        }
    }
}
```

TestClass: propClassTest

propTrigger.apxt | propClass.apxc | propClassTest.apxc

Code Coverage: None | API Version: 58

```
@isTest
public class propClassTest {
    @testSetup
    private static void PropertytestSetup(){
        List<Enquiry__c> listofEnquiry = new List<Enquiry__c>();
        List<Property__c> listofproperty = new List<Property__c>();
        for(Integer j=0;j<10;j++){
            Enquiry__c newEnquiry = new Enquiry__c();
            newEnquiry.Name='newEnquiry'+j;
            if(j<5){
                newEnquiry.Lead_Type__c='Buy';
            }
            else{
                newEnquiry.Lead_Type__c='Rent';
            }
            newEnquiry.State__c='Maharashtra';
            newEnquiry.City__c='Nashik';
            newEnquiry.Email__c='pradeepchandu'+j+'@gmail.com';
            newEnquiry.Phone__c='954615875'+j;
            listofEnquiry.add(newEnquiry);
        }
```

```
        if(!listofEnquiry.isEmpty()){
            insert listofEnquiry;
            for(Integer i=0;i<10;i++){
                Property__c createproperty = new Property__c();
                createproperty.Name='Newproperty'+i;
                createproperty.Enquiry__c=listofEnquiry[i].Id;
                if(i<5){
                    createproperty.Property_Type__c='Residential';
                    createproperty.Residential__c='3BHK';
                }
                else{
                    createproperty.Property_Type__c='Industrial';
                    createproperty.Industrial__c='Factory';
                }

                createproperty.State__c='Maharashtra';
                createproperty.City__c='Nashik';
                createproperty.Discount__c=20;
                createproperty.Price__c=100000;
                createproperty.Loan_Amount__c=50000;
                createproperty.RecordTypeId='0125j000000K3BLAA0';
                listofproperty.add(createproperty);
            }
            if(!listofproperty.isEmpty())
            {
                insert listofproperty;
            }
        }
    }
```

```
    @isTest
    private static void propMethodtestOne(){
        List<Property__c> getlistofproperty = [Select Name,Property_Type__c,State__c,City__c,Discount__c,Price__c,Loan_Amount__c,Commercial__c
                                               From Property__c Where Name Like '%Newproperty%'];
        System.AssertEquals('Shop',getlistofproperty[0].Commercial__c);
    }
    @isTest
    private static void propMethodtestTwo(){
        List<Property__c> getlistofproperty = [Select Id,Name,Property_Type__c,State__c,City__c,Discount__c,Price__c,Loan_Amount__c,Commercial__c
                                               From Property__c Where Name Like '%Newproperty%'];
        if(!getlistofproperty.isEmpty()){
            for(Property__c pr : getlistofproperty){
                pr.Property_Type__c='Residential';
                pr.Residential__c='2BHK';
            }
            update getlistofproperty;
            List<Property__c> getlistofproperty2 = [Select Name,Property_Type__c,State__c,City__c,Discount__c,Price__c,Loan_Amount__c,Commercial__c
                                               From Property__c Where Name Like '%Newproperty%'];
            System.AssertEquals('Shop',getlistofproperty2[6].Commercial__c);
        }


    }
}
```

| | | | |
|---|---|---|---|
| ✓ | TestRun @ 7:44:03 pm | 0 | 1 |
| ✓ | TestRun @ 7:50:31 pm | 0 | 2 |