

Project Report Template

PROPERTY MANAGEMENT USING SALESFORCE

INTRODUCTION

Overview

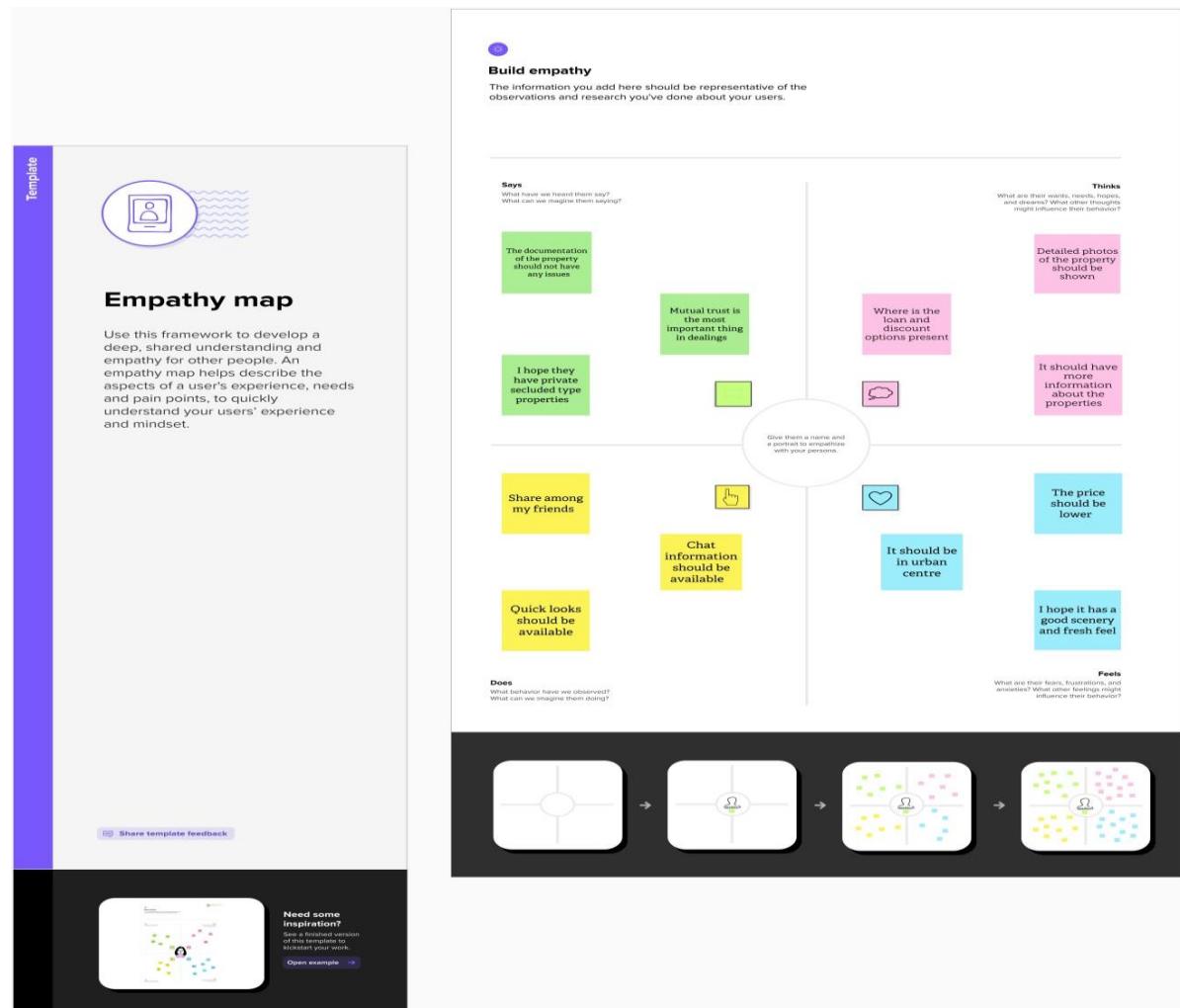
Property management help owners and landlords work remotely and access data on their portable devices from different locations. It allow them to post vacancy ads, track rent payments, check expenses and generate invoices.

Purpose

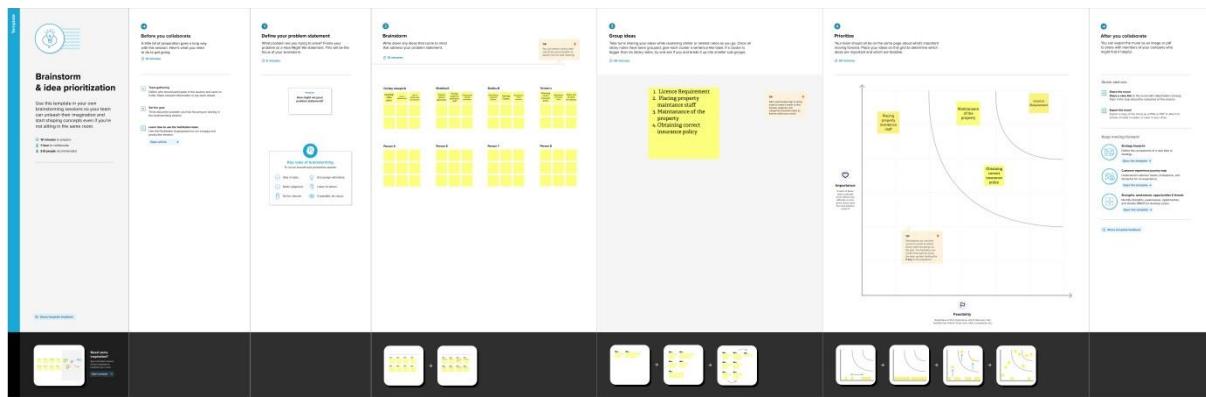
property management is for the operations of commercial ,residential, rental properties. And it makes easy to manage property using third person without direct contact

PROBLEM DEFINITION & DESIGN THINKING

EMPATHY MAPPING



IDEATION & BRAINSTORMING MAP

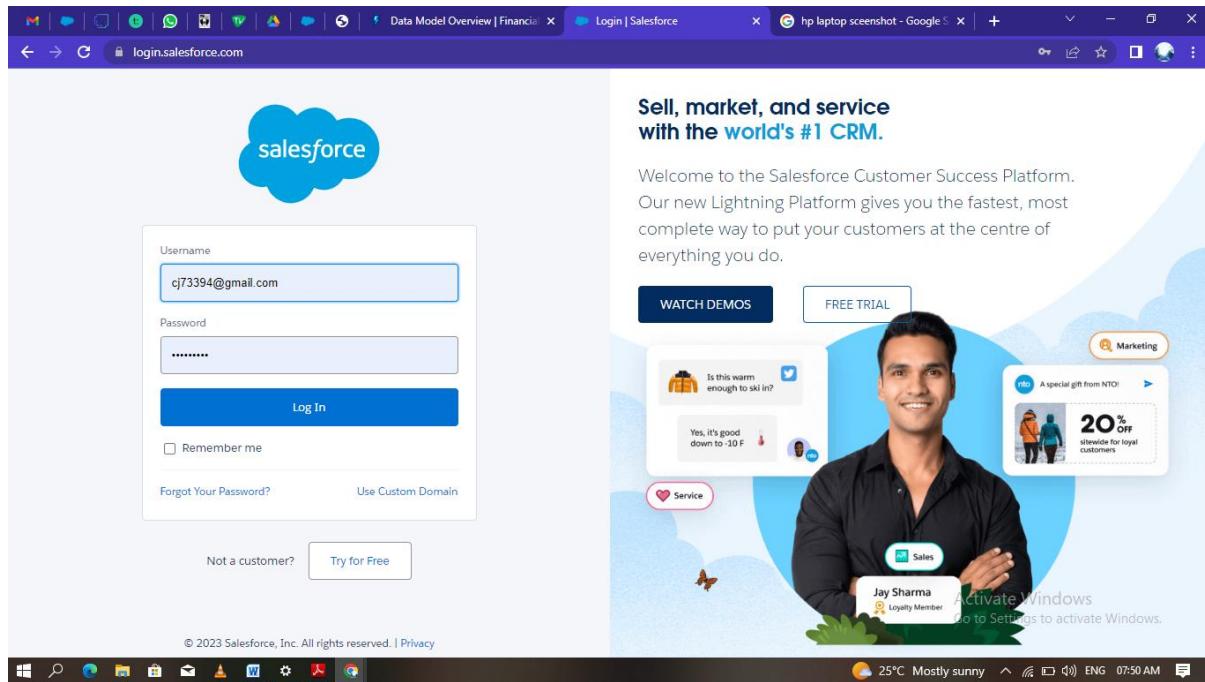


RESULT

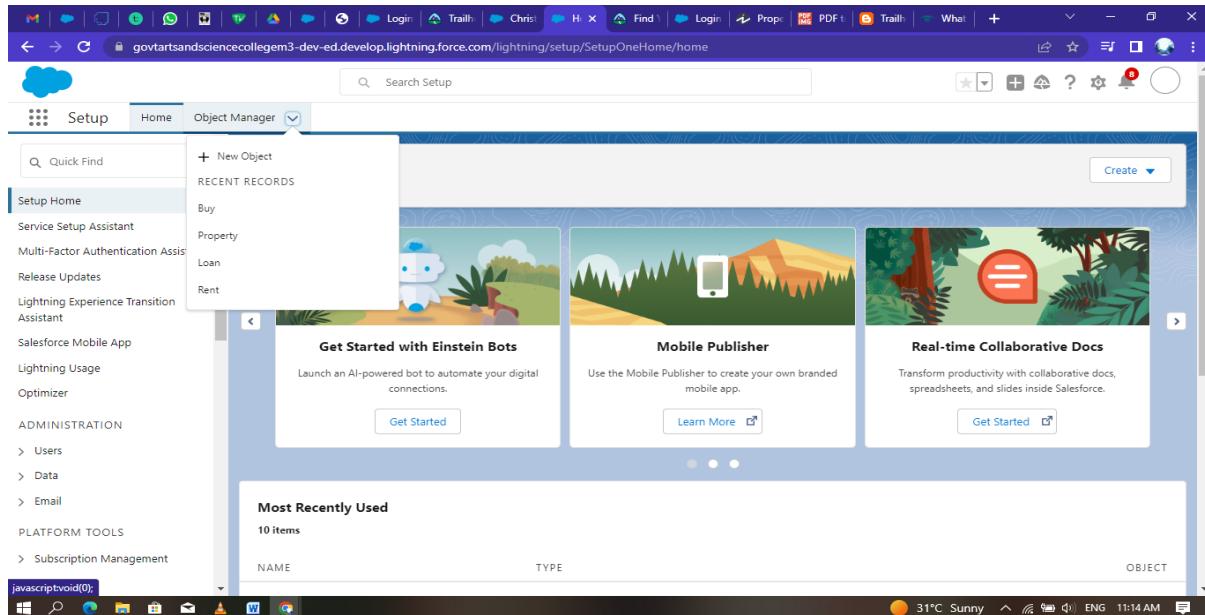
Data model

OBJECT NAME	FIELDS IN THE OBJECT	
	FIELD LABEL	DATA TYPE
PROPERTY	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
BUY	Property Type	Picklist
	Discount	Percent
	State	Picklist
	City	Picklist
RENT	Rent	Autonumber
	Rental city	Text
	BHK	Picklist
LOAN	Loan Id	Autonumber
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total Loan Installment	Number
	Loan Repayment	Number
	Loan Amount	Formula

Activity And Screenshot



After creating developer account login into your salesforce account



Go to the setup page and select object manager

The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with links like Setup, Home, and Object Manager. Below the navigation is a search bar labeled "Search Setup". The main area is titled "Object Manager" and shows a table of objects. The columns are labeled "LABEL", "API NAME", "TYPE", and "DESCRIPTION". The "TYPE" column shows most objects as "Standard Object". A dropdown menu in the top right corner is open, showing options like "Custom Object" and "Custom Object from Spreadsheet". The table lists various objects such as Account, Activity, Alternative Payment Method, API Anomaly Event Store, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, Asset Action Source, and Asset Relationship.

And in object manager click **create** and select **custom object**

The screenshot shows the "New Custom Object" setup page. At the top, there's a message about permissions being disabled by default. Below that is a "Custom Object Definition Edit" form. The "Custom Object Information" section includes fields for "Label" (set to "Buy"), "Plural Label" (set to "Buys"), and "Starts with vowel sound" (unchecked). The "Object Name" field is set to "Buy". The "Description" field is empty. Under "Context-Sensitive Help Setting", the "Open the standard Salesforce.com Help & Training window" option is selected. The "Content Name" dropdown is set to "None". The "Enter Record Name Label and Format" section allows setting the record name for page layouts, key lists, related lists, lookups, and search results. The "Record Name" field is set to "Buy". The "Data Type" dropdown is set to "Text". The "Optional Features" section contains checkboxes for "Allow Reports" and "Allow Activities", both of which are unchecked.

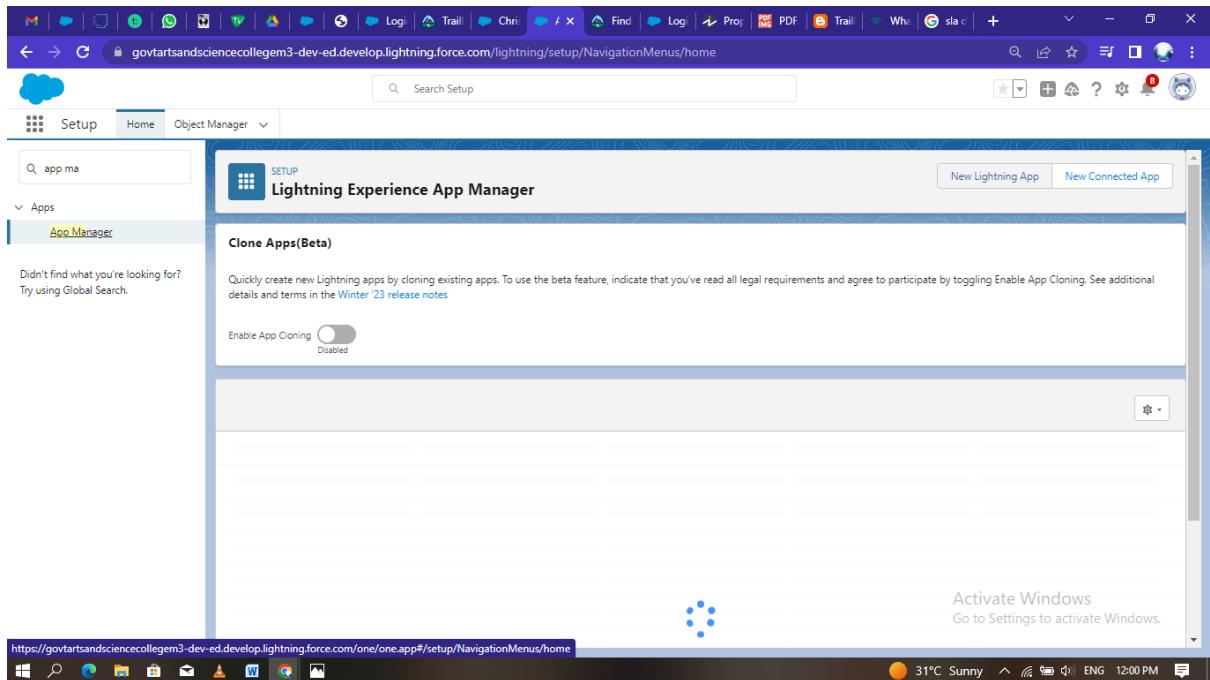
Enter **label name** , **plural name**, click on **allow reports**, click on **allow search** and click **save** . This is the process for creating objects and using this process create objects for (Buy,Rent,Loan)

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Interface', the 'Tabs' option is selected. The main content area is titled 'Custom Tabs' and contains a table for 'Custom Object Tabs'. The table has columns for Action, Label, Tab Style, and Description. It lists four tabs: 'Buyers' (Shopping Cart style), 'Loans' (Bank style), 'Properties' (Building style), and 'Rents' (Safe style). Below this is a section for 'Web Tabs' which states 'No Web Tabs have been defined'. At the bottom right of the page, there is a message: 'Activate Windows Go to Settings to activate Windows.'

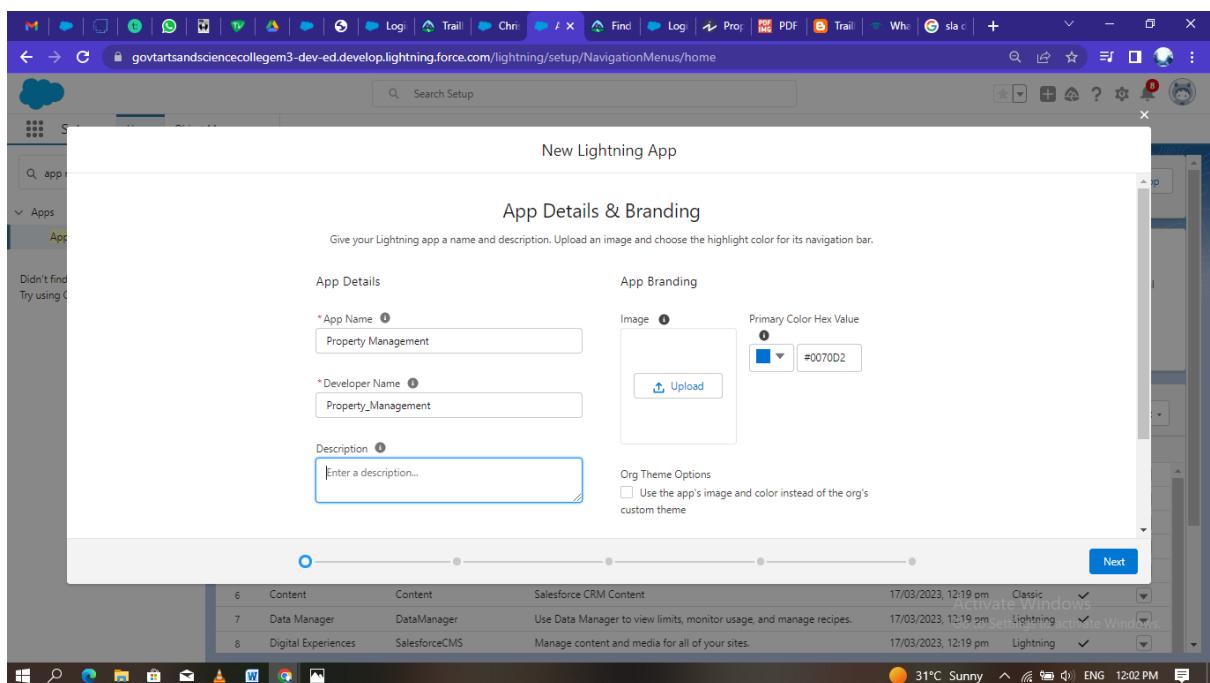
After creating objects go back to **setup** page and in **quick find** bar -> search **tabs** and click **new**

The screenshot shows the 'New Custom Object Tab' setup wizard. Step 1, 'Enter the Details', is displayed. It asks to choose a custom object or create a new one. The 'Object' dropdown is set to '--None--'. The 'Tab Style' dropdown is also set to '--None--'. There is an optional field for a 'Home Page Custom Link' which is currently empty. A 'Description' text area is provided for entering a short description. At the bottom right, there is a 'Next' button and a 'Cancel' button. A message at the bottom right says: 'Activate Windows Go to Settings to activate Windows.'

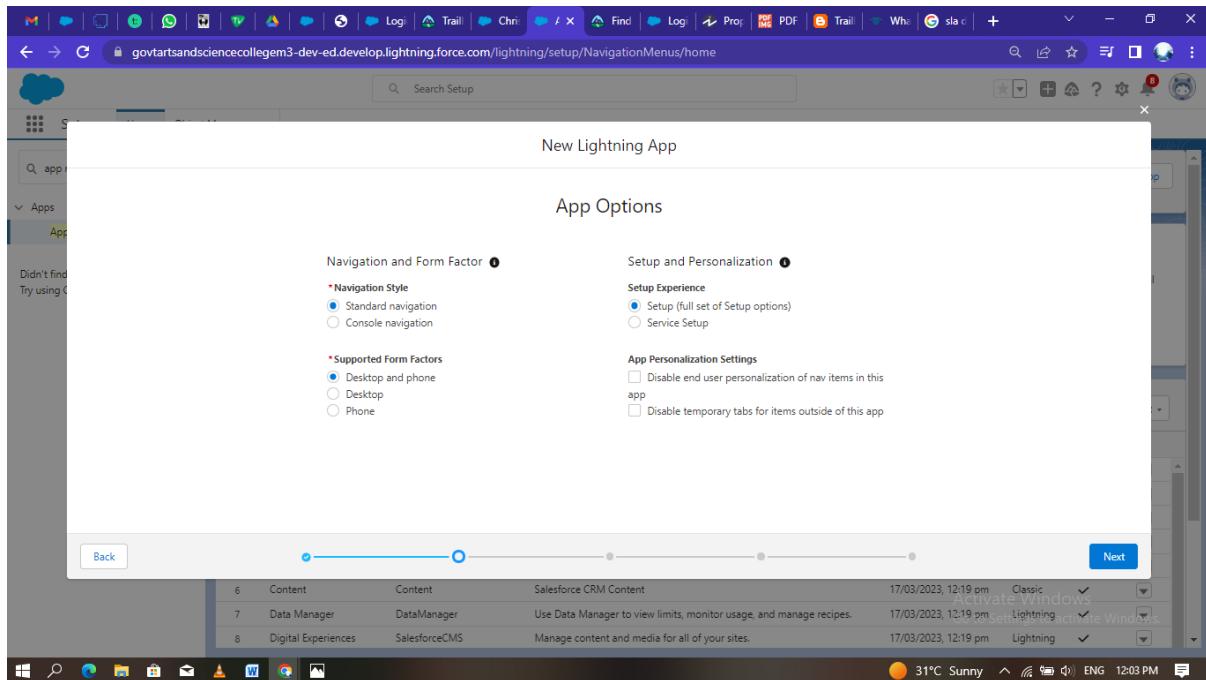
In step 1:Select **object** and select **tab style** and next . In step 2 and step 3 keep it as default and select **next** and **save** . Create each tab for each object



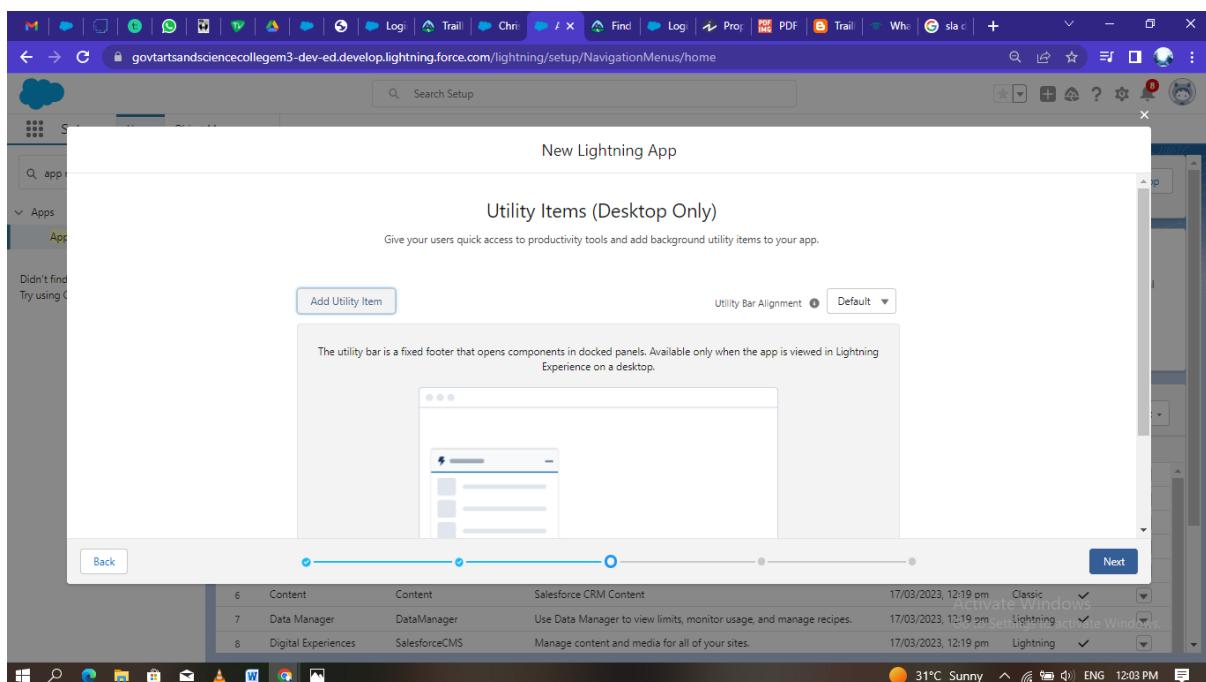
Go to setup page and search app manager in quick find and select new lightning app



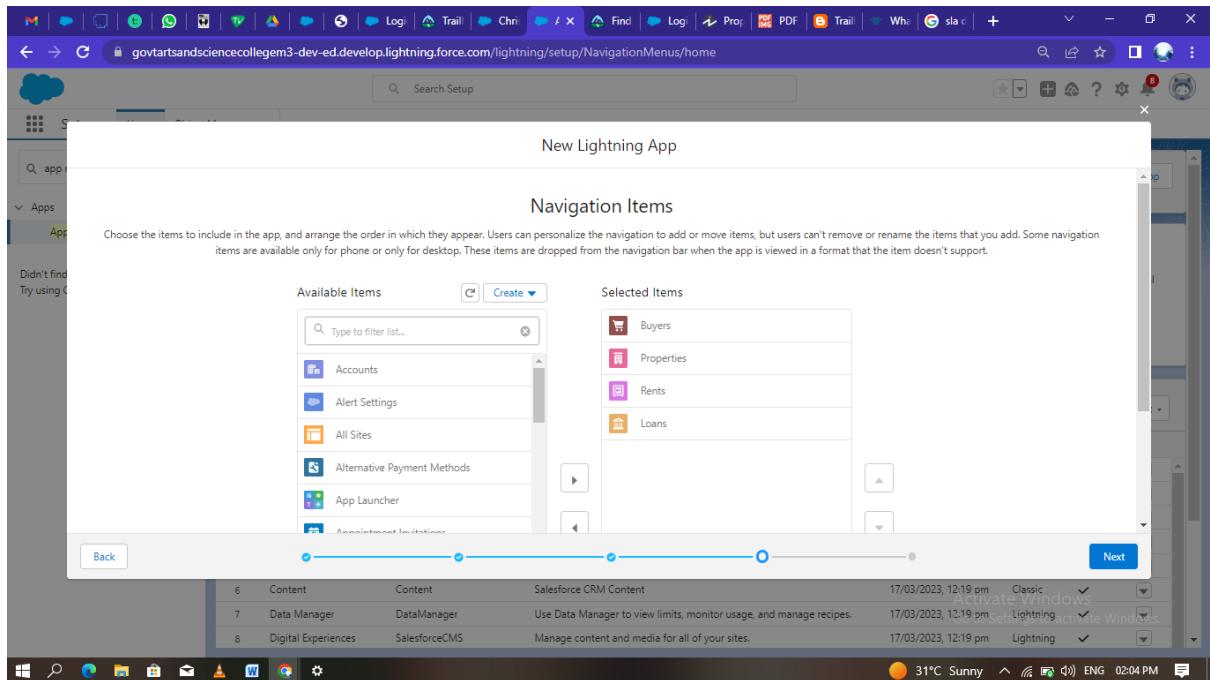
Fill the app details and click next



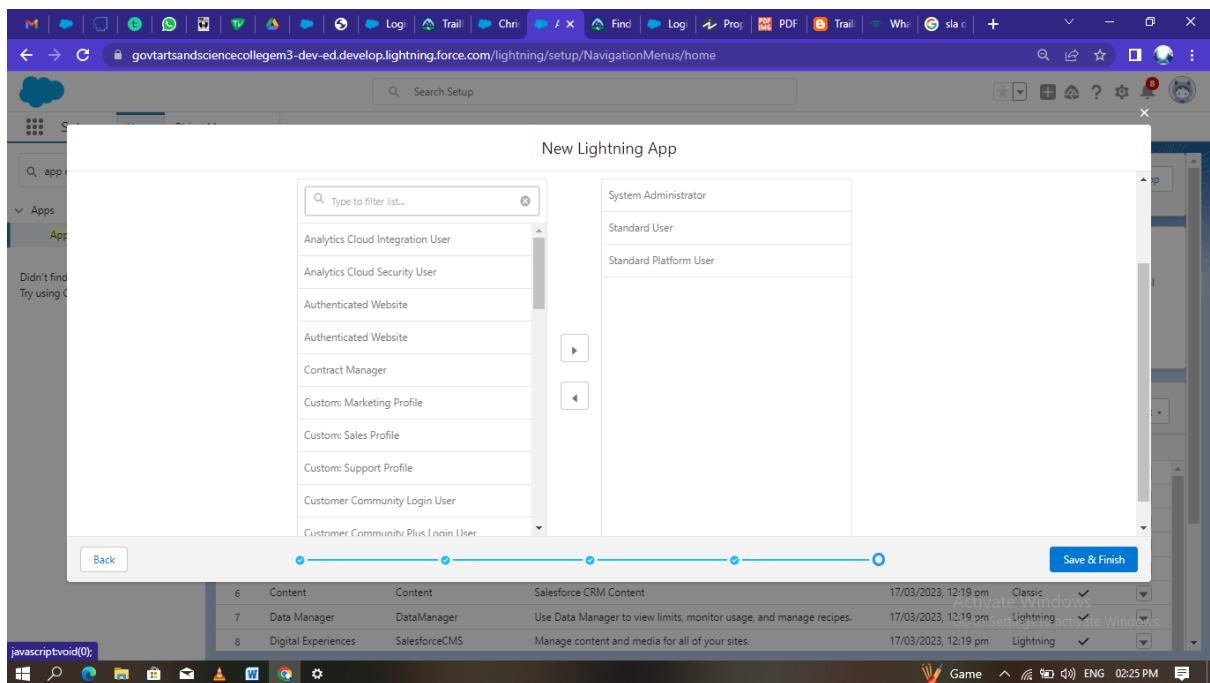
Keep the **app option** page default and select **next**



Keep the **utility items** page default and click **next**



For navigation items choose the tabs (buy,property,rent,loan,)



In user profile add **system administrator**, **standard user**, **salesforce platform user** and **save and finish**

The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with links like Setup, Home, and Object Manager. Below that is a search bar with the placeholder "Search Setup". The main area is titled "Object Manager" and shows a table with four rows:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Business Brand	BusinessBrand	Standard Object			
Buy	Buy__c	Custom Object		09/04/2023	✓
Product Attribute	ProductAttribute	Standard Object			
Product Attribute Set Product	ProductAttributeSetProduct	Standard Object			

At the bottom right of the page, there's a message: "Activate Windows Go to Settings to activate Windows." The browser address bar shows the URL: <https://govtartsandsciencecollege3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003p81q/view>. The taskbar at the bottom of the screen shows various icons and the system tray indicates it's 36°C, sunny.

Go to the **setup** and click **object manager** and search for the object created and click the object

The screenshot shows the "Fields & Relationships" page for the "Buy" object. On the left, there's a sidebar with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area is titled "Fields & Relationships" and shows a table with eight rows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy Name	Name	Text(80)		✓
City	City__c	Picklist		✓
Created By	CreatedById	Lookup(User)		✓
Discount	Discount__c	Percent(18, 0)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User/Group)		✓
Property type	Property_type__c	Picklist		✓
State	State__c	Picklist		✓

At the bottom right of the page, there's a message: "Activate Windows Go to Settings to activate Windows." The browser address bar shows the URL: <https://govtartsandsciencecollege3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003p81q/FieldsAndRelationships/view>. The taskbar at the bottom of the screen shows various icons and the system tray indicates it's 36°C, sunny.

Click on **fields** and **relations** click **new** and create fields by selecting data types ,and next fill field name and keep the other pages default .

For object buy the fields are

FIELD NAME	DATA TYPE
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Property Type	Picklist
Discount	Percentage
State	Picklist
City	Picklist

For rent

Rent	Auto Number
Rental City	Text
BHK type	Picklist

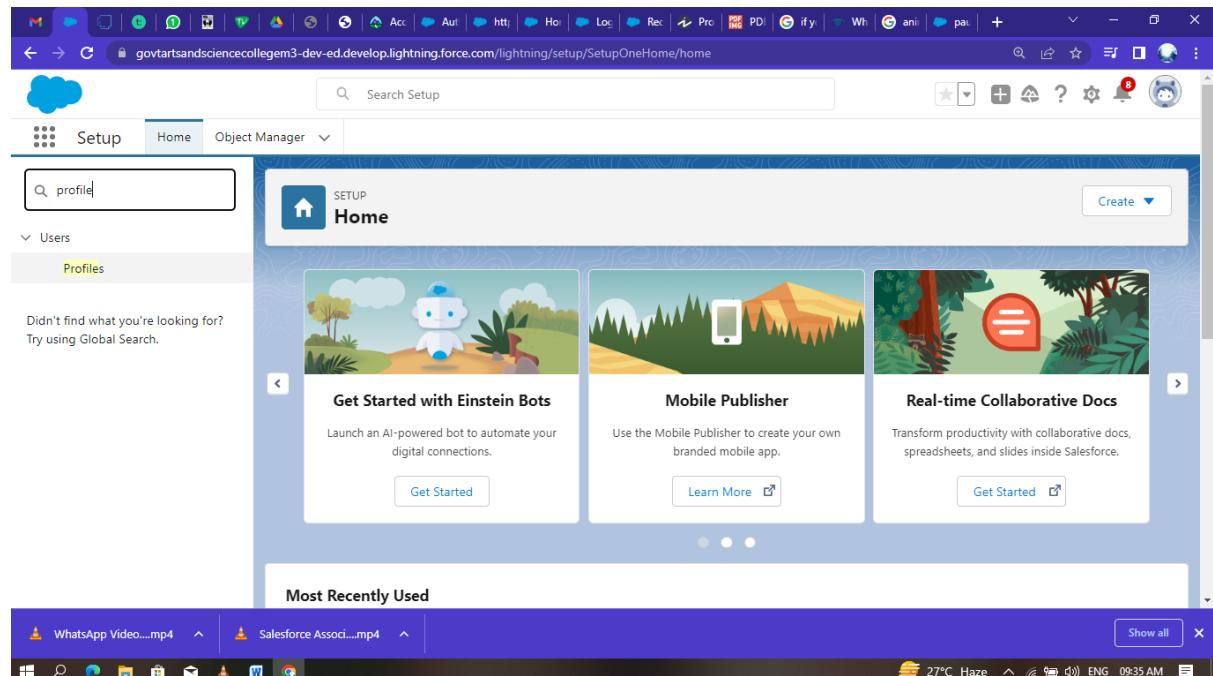
For loan

Loan Id	Autonumber
Interest Rate	Currency
Term	Number
Annual Loan	Number
Total Loan Instalments	Number
Loan Repayment	Number
Loan Amount	Formula

And in loan after selecting formula and moving onto **advanced formula** write the formula as

(Loan_Repayment__c * (((1+(Interest_rate__c /52))ⁿ Term__c) -1))/((

Interest_rate__c /52)*((1+(Interest_rate__c /52))ⁿ Term__c))



Go to setup page search for **profiles** and click **profiles**

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar has 'Users' expanded, with 'Profiles' highlighted. A search bar at the top right contains 'Search Setup'. The main content area displays a table of profiles, with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table includes rows for various standard profiles like 'Analytics Cloud Integration User', 'Authenticated Website', and 'Chatter External User'. A navigation bar at the bottom shows 'Page 1 of 2'. Below the browser window is a Windows taskbar with several open application icons.

Clone the wanted profile and enter the profile name and click **save**

The screenshot shows the Salesforce Setup interface with the 'SalesManager' profile selected for editing. The left sidebar shows 'Users' expanded. The main content area displays the 'Profile Detail' section for the 'SalesManager' profile, which includes fields for 'Name' (SalesManager), 'User License' (Salesforce), and 'Custom Profile' (checked). Below this is a 'Page Layouts' section. A navigation bar at the bottom shows 'Page 1 of 1'. Below the browser window is a Windows taskbar with several open application icons.

Click edit

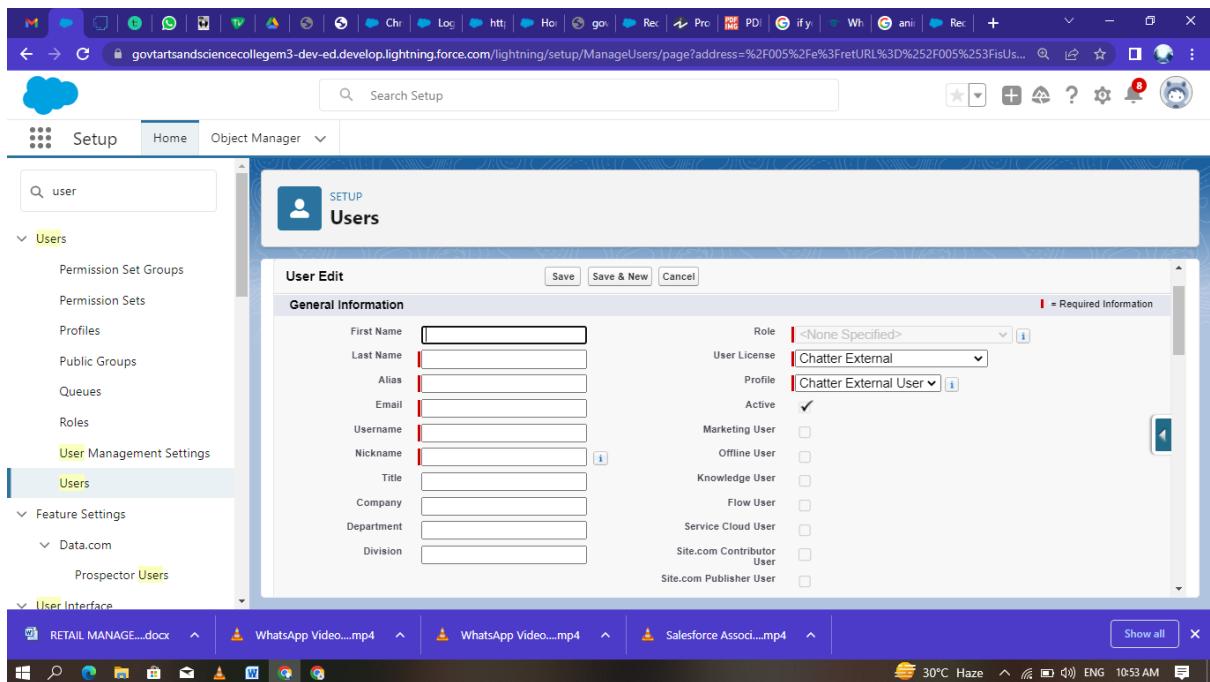
The screenshot shows the Salesforce Setup Profiles page. On the left, there's a sidebar with links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (Users, Permission Set Groups, Permission Sets). The main area is titled "Profiles" and contains sections for "Custom Object Permissions" (with tabs for Invoices, Leads, and Work Type Groups) and "Session Settings" (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None). Below these are "Password Policies". The bottom of the screen shows a taskbar with various files and system status.

Scroll down and give view all access and save

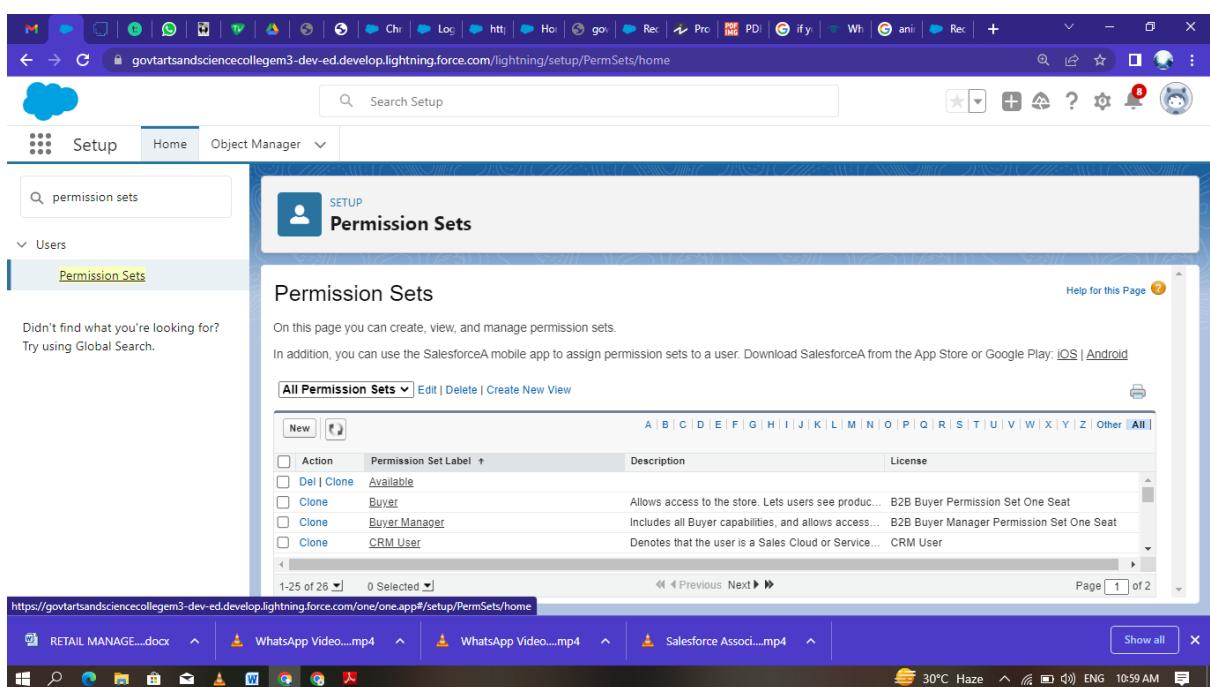
The screenshot shows the Salesforce Setup Users page. The sidebar includes links for Users (Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and the current Users link), Feature Settings, Data.com, and User Interface. The main area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users with their respective details and assigned profiles. The bottom of the screen shows a taskbar with files and system status.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00d2w0000roo2zeear nthyklz/2bdmar@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	G_Christy_joseph	CG	g73394@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	k_Shobika	sk	shobikavibalaji@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SalesManager
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d2w0000roo2zeear.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics_Cloud_Integration_User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d2w0000roo2zeear.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics_Cloud_Security_User

Go to setup and search for users in quick find and select **users** and in user page click **new user**



Fill the details for **first name, last name, alias, email id, username, nick name, role, user license, profiles and save**



Go to setup and search for **permission sets** in quick find and click **permission sets** and click **new**

The screenshot shows the Salesforce Setup interface with the URL govtartsandsciencecollege3-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp. The page title is "Permission Sets". A search bar at the top right contains "Search Setup". The main content area is titled "Permission Set Create". It includes fields for "Label" (with placeholder "New Permission Set"), "API Name" (with placeholder "stock"), and "Description". A checkbox for "Session Activation Required" is present. Below the form is a section titled "Select the type of users who will use this permission set".

The screenshot shows the Salesforce Setup interface with the URL govtartsandsciencecollege3-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOP%2w00000AIQhM%3FsfclFrameOrigin%3Dhttp.... The page title is "Permission Sets". A search bar at the top right contains "Search Setup". The main content area is titled "Permission Set Overview" for the "stock" permission set. It displays details such as "API Name: stock", "Namespace Prefix: ", "Created By: Christy.joseph_G", and "Last Modified By: Christy.joseph_G, 14/04/2023, 11:02 am". Below this is a section titled "Apps" with two subsections: "Assigned Apps" and "Assigned Connected Apps".

The screenshot shows the Salesforce Lightning interface. The top window is titled "... > SETUP > PERMISSION SET 'STOCK'". It displays a section titled "Current Assignments" with a blue cactus icon. Below this, a modal window is open with the title "... > PERMISSION SET 'STOCK' > MANAGE ASSIGNMENT EXPIRATION". The modal contains a table with two rows, each representing a user assigned to the permission set:

Full Name	Title	Phone	Email
Shobika k			shobikavibalaji@gmail.com
Christy joseph G			cj73394@gmail.com

Enter **label name** and click **save** and after saving click on **manage assignments** and click on **add assignments** and select the users you have created and click **save**

The screenshot shows the 'Sharing Settings' page in the Salesforce setup. The left sidebar has 'Sharing' selected under 'Security'. The main area displays 'Organization-Wide Defaults' for various objects:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>

At the bottom right of the page, there is a message: 'Activate Windows. Go to Settings to activate Windows. Show all'.

The screenshot shows the 'Sharing Settings' page in the Salesforce setup. The left sidebar has 'Sharing' selected under 'Security'. The main area displays detailed sharing settings for various objects:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>
Voice Call	Private	Private	<input checked="" type="checkbox"/>

At the bottom right of the page, there is a message: 'Activate Windows. Go to Settings to activate Windows. Show all'.

Go to **setup** and search for **sharing settings** in quick find and click it . In sharing setting page and click **edit** . and select default access to the objects

The screenshot shows the 'Reports' section of a web application. On the left, there's a sidebar with categories like 'RECENT', 'CREATED BY ME', 'PUBLIC REPORTS', 'ALL REPORTS', 'FOLDERS', and 'SHARED WITH ME'. The main area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
Property Management Report	Private Reports	Christy joseph G	11/4/2023, 10:29 pm		
Property Management Accounts Report	Public Reports	Christy joseph G	12/4/2023, 11:13 am		

At the bottom of the page, there's a status bar showing 'Activate Windows', 'Go to Settings to activate Windows...', 'Show all', and system information like '34°C Haze', 'ENG', and '11:58 AM'.

The screenshot shows the 'Create Report' page. On the left, there's a sidebar with categories: 'RECENTLY USED' (All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads), 'RECENTLY USED REPORT TYPES' (Accounts, Leads), and a search bar for 'Search Report Types...'. The main area has a heading 'Create Report' and a large, dark gray central area where report content would be displayed.

At the bottom of the page, there's a status bar showing 'Activate Windows', 'Go to Settings to activate Windows...', 'Show all', and system information like '34°C Haze', 'ENG', and '11:59 AM'.

Go to the application and select **reports** and select **new reports** and select one of the report type and customize your report and then **save** and **run** it

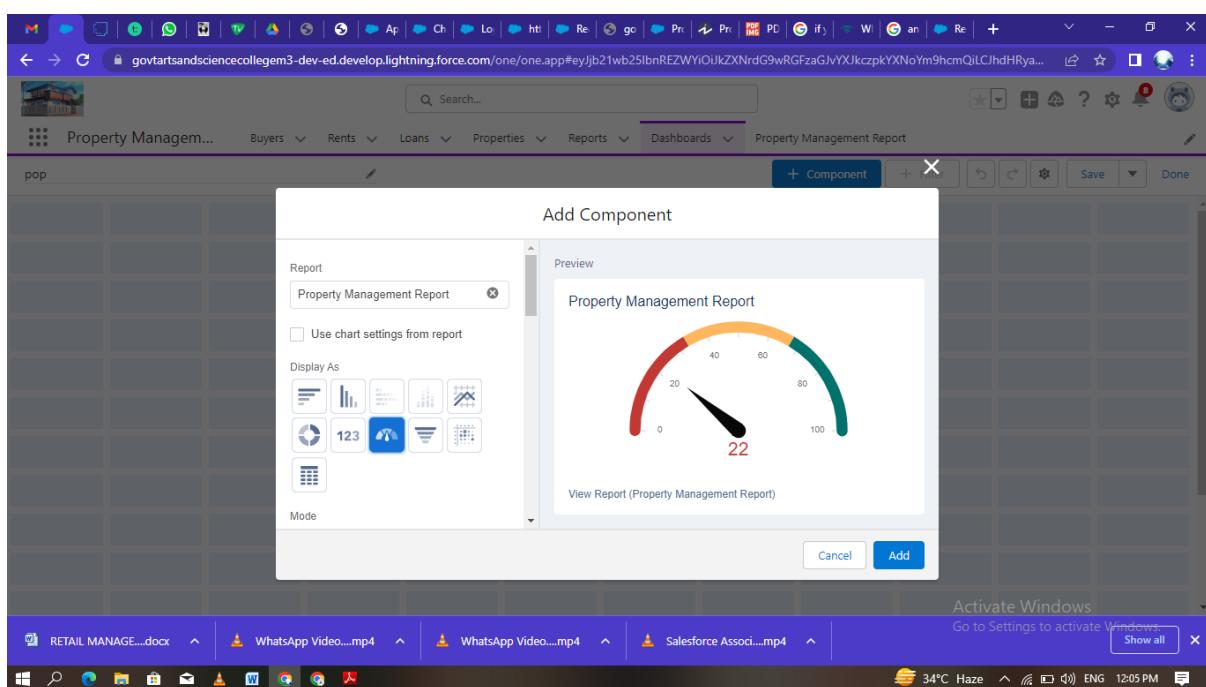
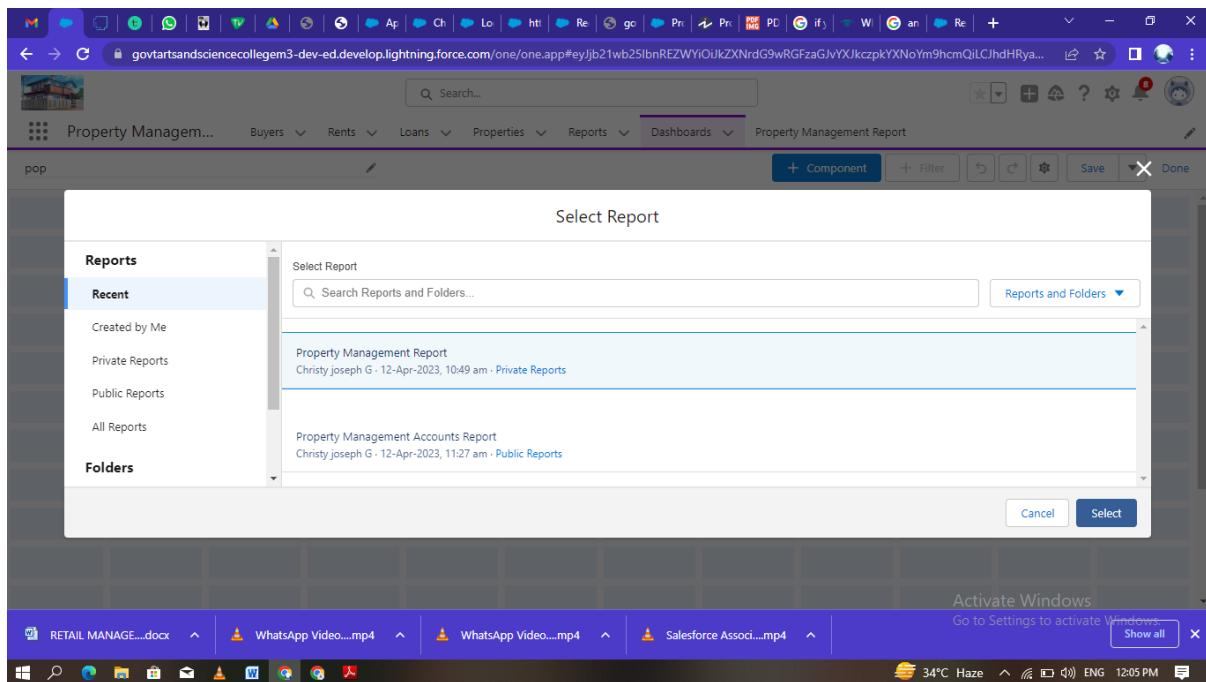
The screenshot shows a browser window for the 'Property Management Report' dashboard. The top navigation bar includes links for Buyers, Rents, Loans, Properties, Reports, Dashboards, and a search bar. Below the navigation is a sidebar with sections for Dashboards (Recent), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). A main table lists recent dashboards:

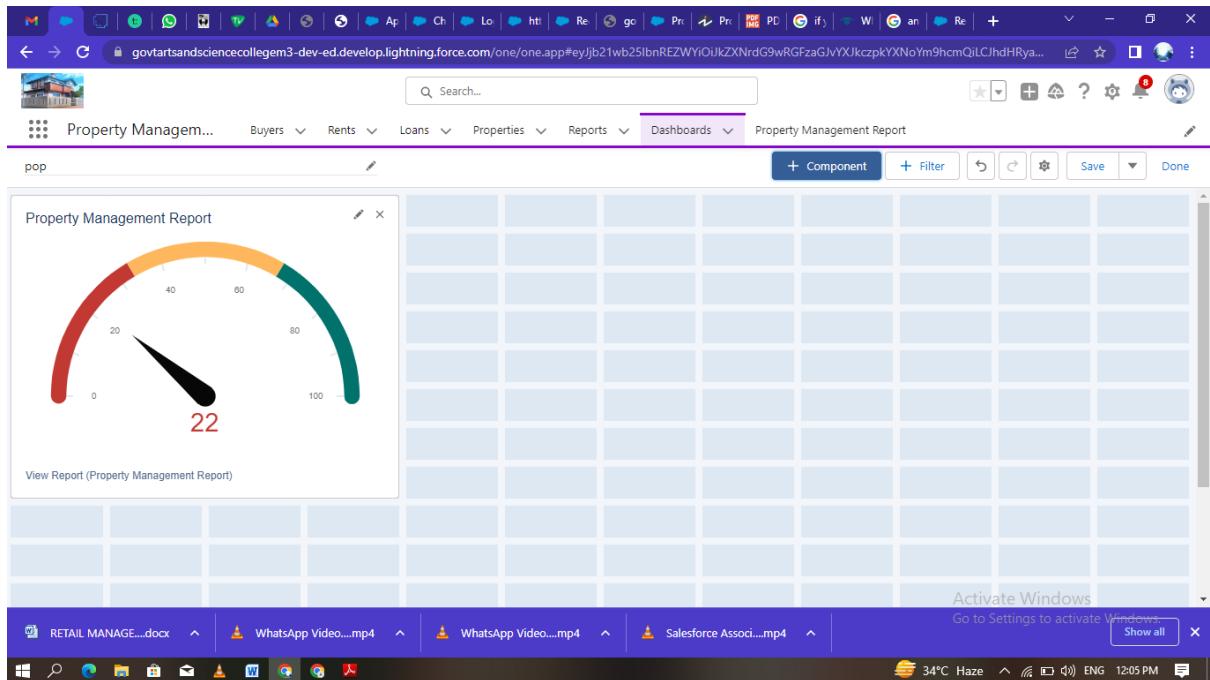
Dashboards	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Property Management dashboard		Private Dashboards	Christy Joseph G	12/4/2023, 11:28 am	
Created by Me	Property Management		Private Dashboards	Christy Joseph G	12/4/2023, 11:21 am	
Private Dashboards	new leads		Private Dashboards	Christy Joseph G	11/4/2023, 11:10 pm	

The status bar at the bottom shows system information: 34°C Haze, ENG, 12:03 PM.

The screenshot shows a 'New Dashboard' dialog box overlaid on the dashboard list. The dialog has fields for Name (empty), Description (empty), and Folder (set to 'Private Dashboards'). Buttons for Cancel and Create are at the bottom. The background shows the same dashboard list as the previous screenshot.

The status bar at the bottom shows system information: 34°C Haze, ENG, 12:04 PM.





Go to the application and select dashboard and new dashboard and give a name and create **dashboard** and select the data and select in which format to display and **save**

TRAILHEAD PROFILE PUBLIC URL

Team Lead

Christy Joseph G - <https://trailblazer.me/id/chris08>

Team Members

1. Shobika K - <http://trailblazer.me/id/shobk3>
2. Sindhu - <http://trailblazer.me/id/ssindu4>
3. Yuvasri. S - <https://trailblazer.me/id/yusri10>

ADVANTAGES & DISADVANTAGE

ADVANTAGES

1. The application helps to ensure your tenants pay their rent on time.
2. It also help to manage your property with third person and your work will be lesser
3. It also provides services and maintainence and it helps prevent loss of tenantd

DISADVANTAGE

1. Time-consuming if you choose the wrong system
2. This may make it more difficult to use other third-party products that may be more useful to your business

APPLICATION

This application can be used for people who wants to buy a property or rent it or maintain it will be very useful for people who come different places and search for properties to live start business

CONCLUSION

This project helped me to learn how to create a application and how to use it and the steps involved in making it will be useful in creating different types of applications .

FUTURE SCOPE

This application can be developed further and by doing so this can be accessed even to remote places and the designs and features are easy to use for the customers