

Project Report Template

INTRODUCTION

Property management defined in short, property management is the operation and oversight of real estate assets. Property managers can work with residential properties such as apartments, condominiums, townhouses, or detached single-family homes, or commercial properties, like shopping centers and office buildings.

1.1 Overview

the daily oversight of residential, commercial, or industrial real estate by a third-party contractor. Generally, property managers take responsibility for day-to-day repairs and ongoing maintenance, security, and upkeep of properties.

1.2 Purpose

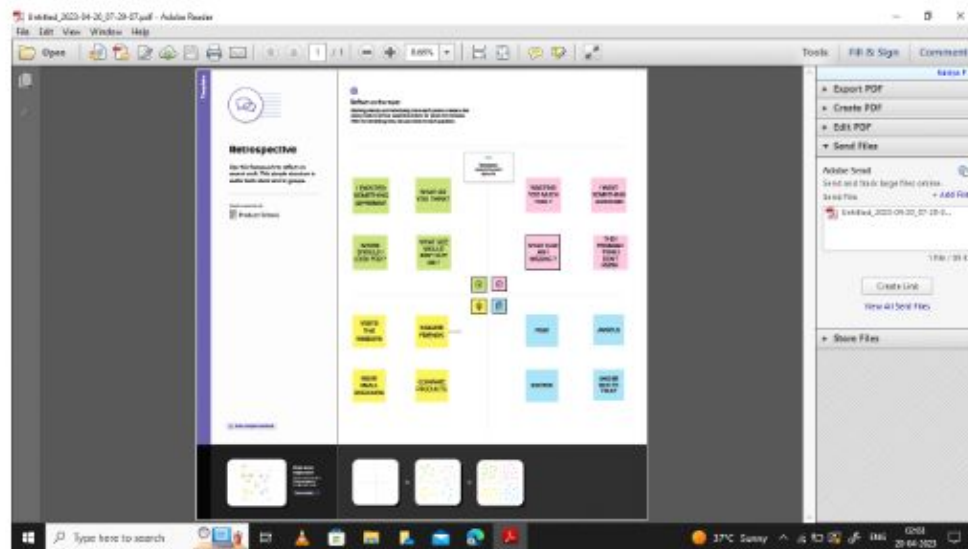
Property managers assist owners in creating budgets, advertise rental properties, qualify tenants, and collect rent.

2. Problem definition & design thinking

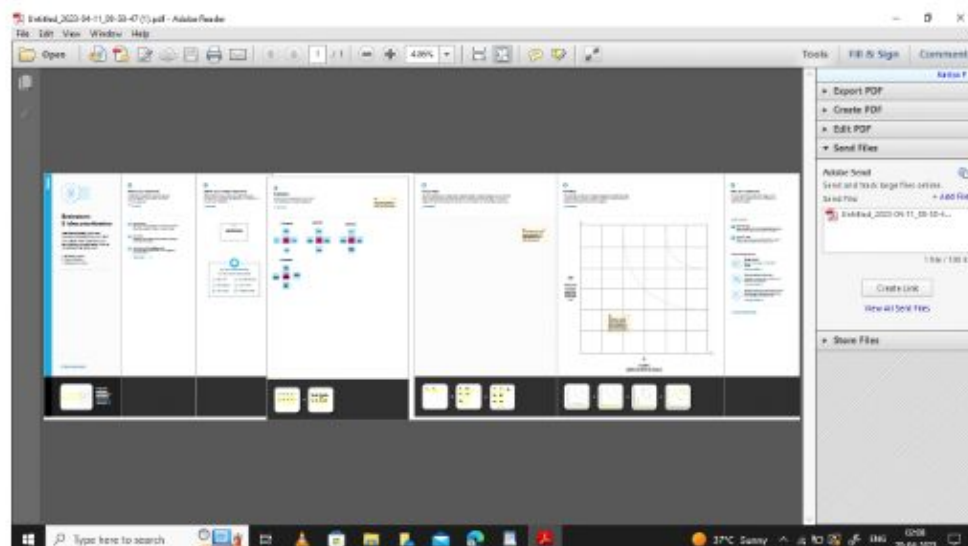
2.1 Empathy Map



2.1 Empathy Map



2.2 Ideation & Brainstorming map



3.2 Activity& Screenshort

Property Management Application using
Salesforce

Project Description;

3.2 Activity& Screenshort

Property Management Application using Salesforce

Project Description;

Develop an app for the property management where buyer can order his requirements and get the appropriate details of the property according to his interest just property 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 it provide the security for to different profile marketing and sales team the finally create the report and dashboard so there will be clear view just get the report and the count of the loan passed get the property purchased closed the deal.

What you will learn

- 1 . Real time salesforce project
2. object and relationship in salesforce

Milestone1- Salesforce

Milestone1- Salesforce

Introduction:

Are you new to salesforce?
not sure exactly what it is,
or how to use it? don't
know where you should
start on your learning journey
this model for you

welcome to salesforce
Salesforce is technology with
a host of boosting features
that will help you sell smarter
and faster

will take you through these
features and answer the
questions "what is salesforce,
anyway?"

what is salesforce?

salesforce is your customer
success platform, designed to

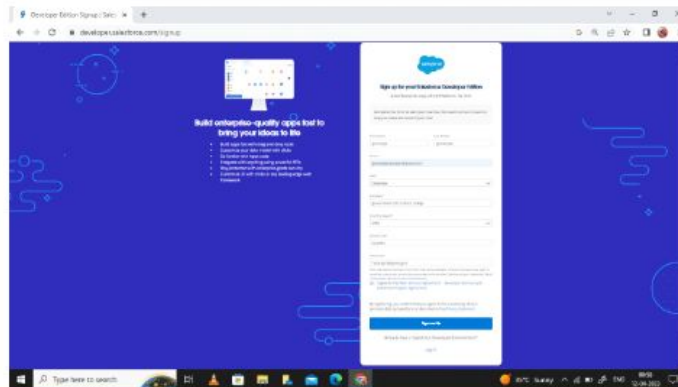
what is salesforce?

salesforce is your customer success platform ,designed to help yousell, service,market anlyze, and conneted with your customer

salesforce has everything you need to run your bussiness from anywhere .Using standard product and future you can manage realtionship with prospects and customers ,collaborate and engage well before salesforce ,your conducts ,emails follow-up tasks ,and prospective deals might have been orgainezed something like this:

[https://youtu.be/r9EX31Gde5](https://youtu.be/r9EX31Gde5k)

k



Activity1:

Creating Developer Account

1. Creating a developer org in salesforce.
2. Click on sign up.
3. On the sign up form, enter the following details:
 - a. First name & Last name
 - b. Email
 - c. Role : Developer
 - d. Company: CollegeName
 - e. Country: India
 - f. Postal Code: pin code
 - g. User name : should be combination of your name and company this need not be an actual email id. you can

f. Postal Code: pin code

g. User name : should be combination of your name and company this need not be an actual email id, you can give anything in the format:

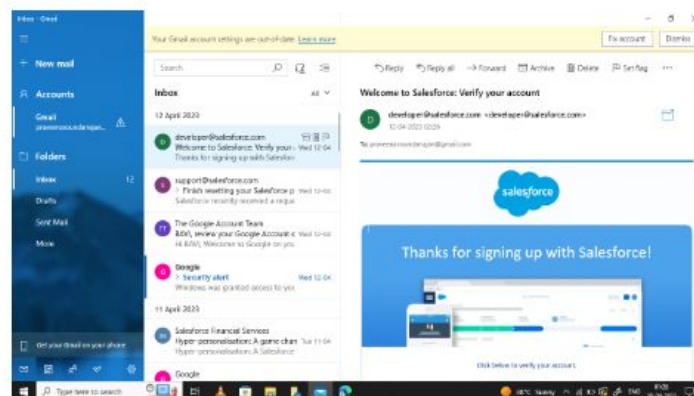
username@organization.com

click on sign up after filling these

Activity2-

Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10 mins, as



2. Login To Your Salesforce Account

Account

Milestone2- Object

What Is Object ?

Salesforce objects are database tables that permit you to store data that is specific an organization.

What are the types of Salesforce objects

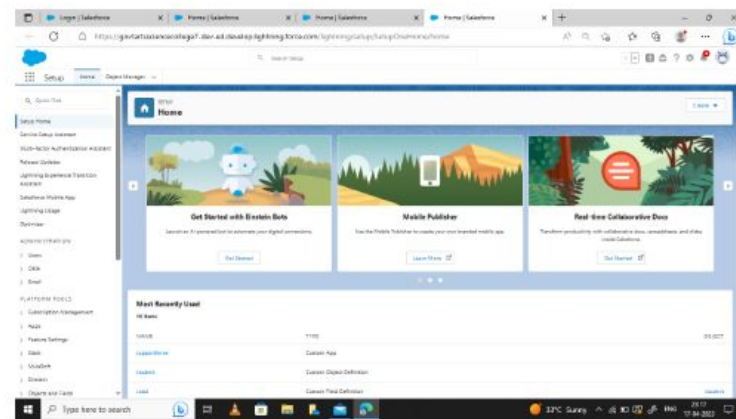
Salesforce object are of two types:

standard Object: Standard objects are the kind objects that are provided by salesforce.com such as user, contracts reports dashboard etc.,

Custom Objects: Custom objects are those objects that are create by users. that is unique and essential to their organizations. they are the heart of any application and provides a structure for

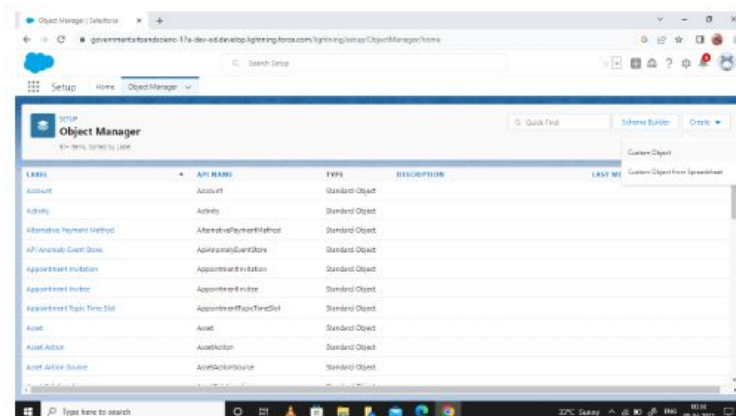
Activity1:

To Navigate to setup- click setup.



To create an object:

2. From the setup - click on object Manager - click on create - click On Custom OBJECT

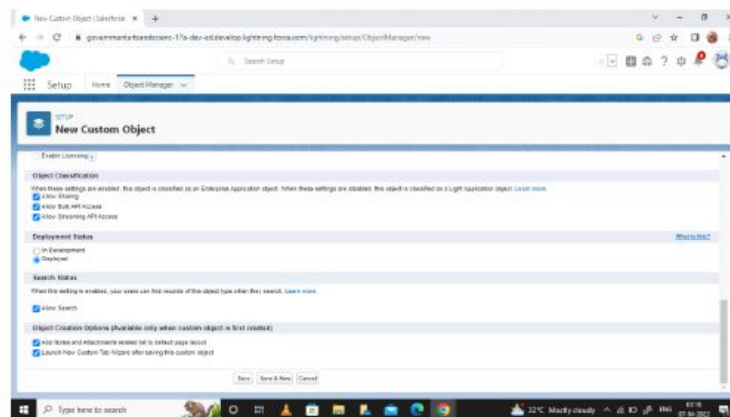
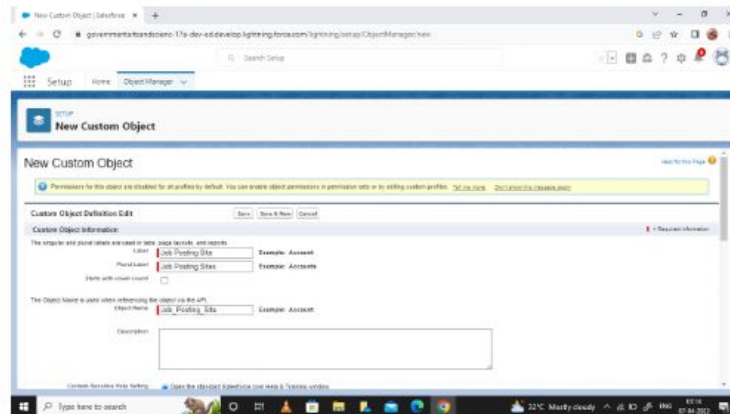


On Custom object defining page:

3. Enter the label name, plural label,name, reports, allow

page.

3. Enter the label name, plural label,name, reports, allow search- save



Activity2:

Create Object Buy

1. To create an object :
2. From the setup page - Click on Object Manager - click on create - click on custom Object.
3. Enter the label name- Buy

3. Enter the label name- Buy
4. plural label name - Buyers,
5. click on Allow reports,
6. Allow search- save

Activity3:

Create Object Rent

1. To create an object:
2. From the setup page- click on Object Manager - click on create - click on custom Object
3. Enter the label name- Rent
4. plural label name -Rents
5. click on allow reports,
6. Allow search- save

Activity3:

Create Object Loan

1. To create an object:
2. From the setup page- click on object Manager - click on create - click on custom object.
9. Enter the label name - Loan

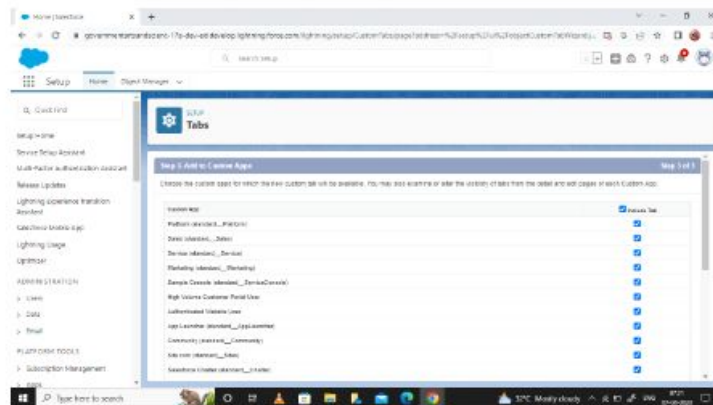
10. plural label name - Loans

11.clickon Allow reports,

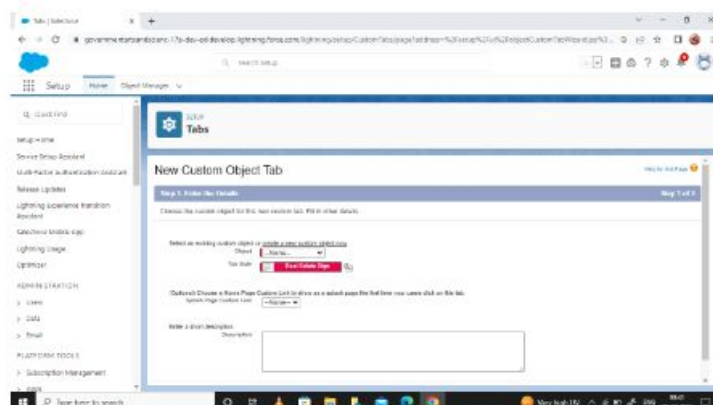
12. Allow search- Save

Activity1:

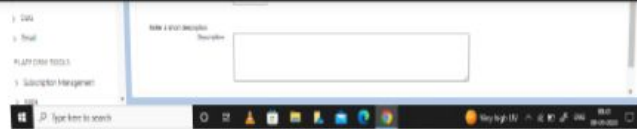
1. Go to setup page -typesin quick find bar- click on tabs - new (under cystem object tab)



2. select Object (lead)- select tab style - next (add to profile pages) keep it as default - Next (Add to custom App) keep it as default - Save



Activity2



Activity2:

To create Tab:(Buy)

1. Go to setup page-types Tabs
Quick find bar- click on tabs - New
(under custom object tab)
2. select Object (Rent)-select the
tab style - Next (Add to profile
page) keep it as deflut- Save

Activity3:

To create a Tab :(Rent):

1. Go to setup page- types Tabs
in Quick Find bar - click on tabs-
New (under customobject tab)
2. Select Object (Rent)- select
the tab style - Next (Add to
Custom App) keep it as defulat
- Save

Activity4:

To create a Tab :(Loan)

- 1.Go to setup
page- type Tabs in Quick Find bar -
click on tabs - new (under
custom object tab)

2. Select Object

defaults - Save

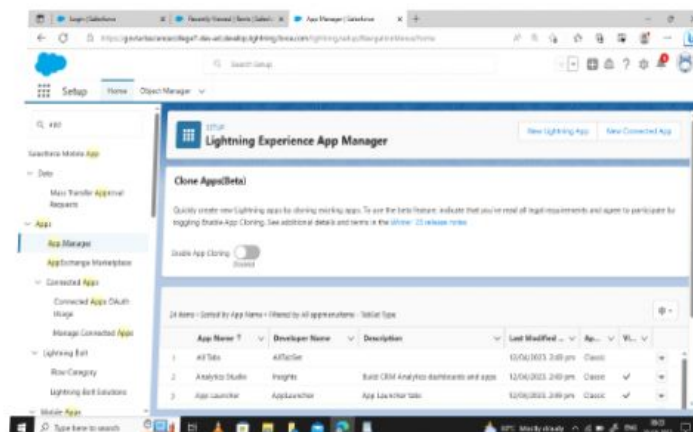
Milestone 4- The Lightning App

An app is a collecting of itmes that work together to serve a particular function. In Lightning Experience, Lightning app given your access to sets of objects, tabs and other itmes all inone convenient bundle in the navigation bar.

Lightning apps let you brand yours apps with Custom colour and logo. You can even include a utility bar and lightning pages tabs in your Lightning app.

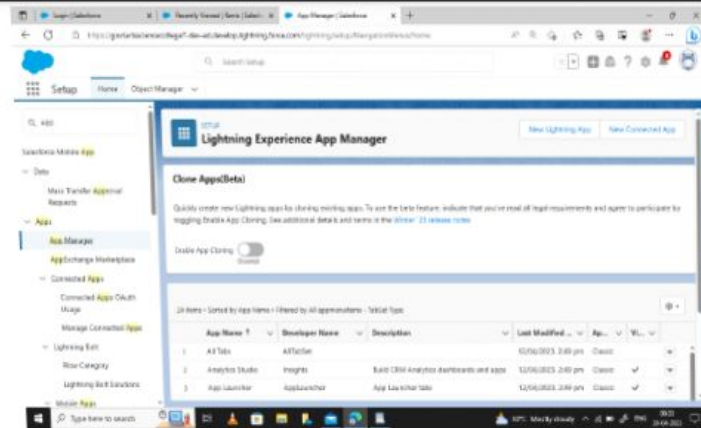
Activity1:

1. Go to setup page- search " app manager " in quick find - select"app manager" on New lightning App



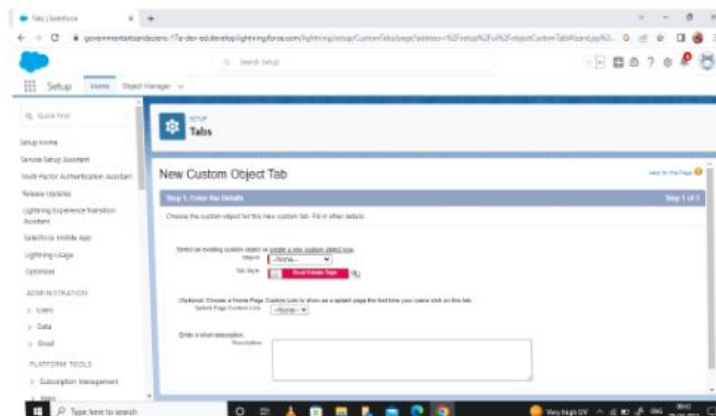
2. Fill the app name as an Property Managment i app details and

Sign in to edit and save changes to this fi...



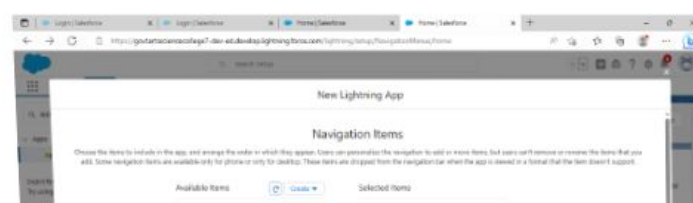
2. Fill the app name as an Property Management i app details and branding- Next - (app options pages) keep it as default

3. Unitty Items keep it as default 0 Next - add navigation items add Lead buy , Rent, Loan Salesforce Add system Administration salesforce platform user, - Next



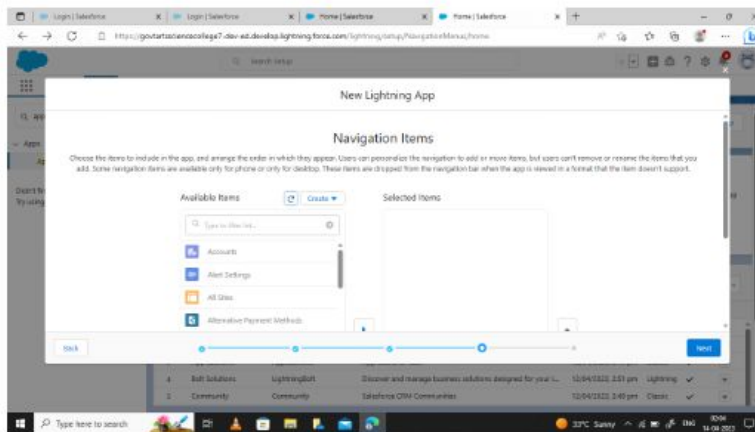
To Add Navigation Items:

Select the items from the search bar and move it using the arrow button-Next.



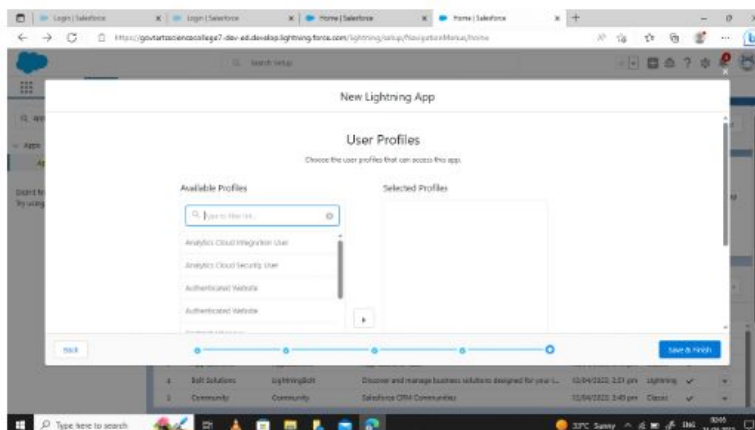
To Add Navigation Items:

Select the items from the search bar and move it using the arrow button-Next.



5. To Add User Profile:

search profiles in search bar-
click on the arrow button -
Save & finish.



Milestone5-FIELDS

when we talk about Salesforce,
fields the data stored in the
columns of a relational database.

Types of Fields

Standard Fields

standard Fields:

As the name suggest, the stuent Fields are the predefined fields in salesforce that perform a standard task. The main point is that you cant simply delete a standard Field .

Created BY

Owner

Last Modified

Feld Made During objectCreating



Custom Fields:

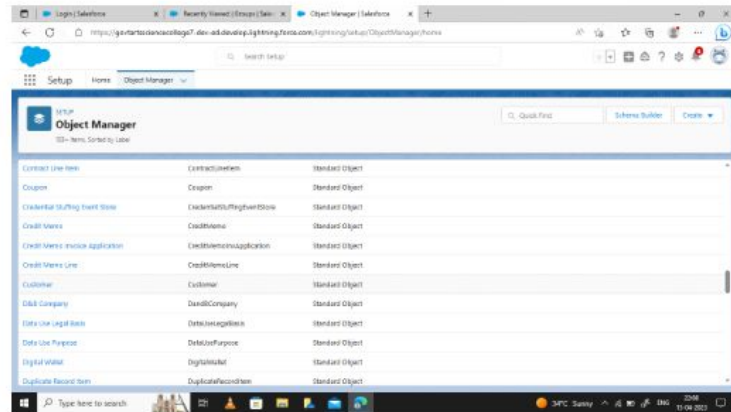
On the other side of the coinm Customfields are highly flexiable and users canchange them according to requiriment Moreover each organization or company can use them if necessary it means you need not always includenthem in the record unlike Standard fields common ndecision depends on the user, and he can Add/ remove Custom Field of any given from

Create the lead Field

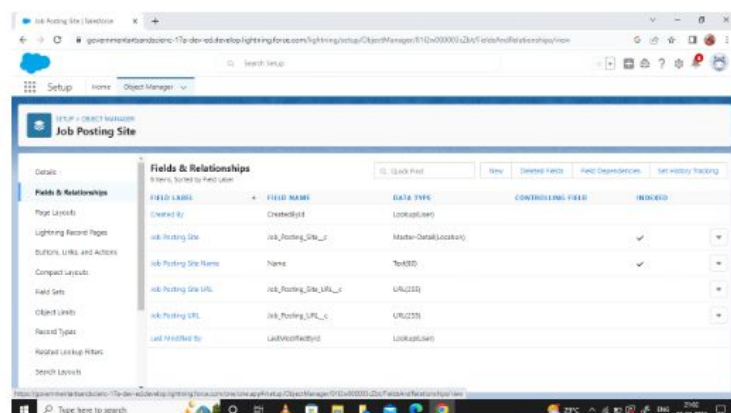
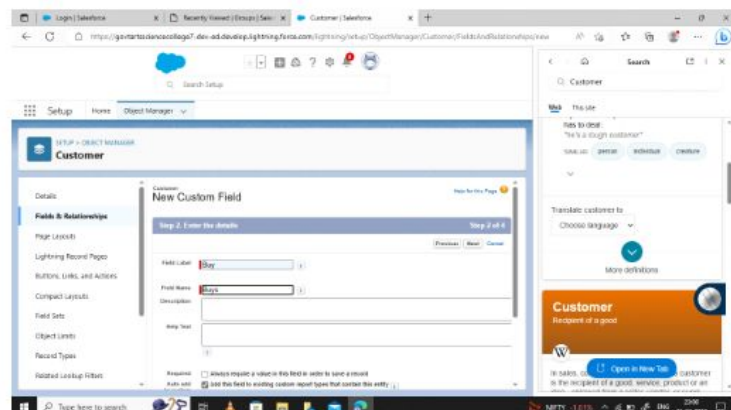
1. Go setup-click on object Manager - type object name in search bar- click on theobject

Create the lead Field

1. Go setup-click on object Manager - type object name in search bar- click on the object



2. Now click on "Field & Relationships"- new



3. fill the field name Lead- Next - Next - Save .

create the remaining Fields:

create the remaining Fields:

Follow the Above steps to create the fields just change the lables for

Lead:(Auto Number Create Field just change the lables for Below Fields

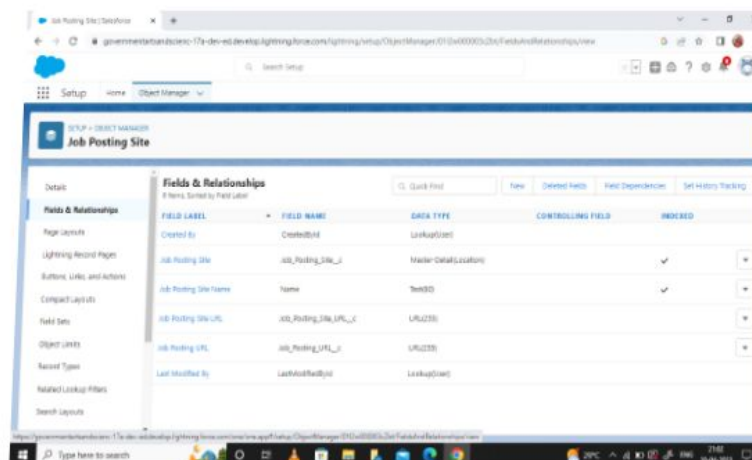
State:(Auto number Created Field While creating object- L{0000}

City: Create the picklisField (Maharashtra, Gujarat, Rajasthan) (Field Dependency)

Email: Create the Email Select the Data type as Email(Email)

Phone: Selected the Field Data type as (phone)

In the Fields and Relationship go to the Field Dependencies



Activity2: for object Buy

1. Create Field for Buy



Activity2: for object Buy

1. **Create** Field for Buy
2. **Create property type :**
(Picklist) (Residential , Commerical,
Industrial)
3. **Discount** (percentage As the
field Data Types)
4. **State:** Create the picklist Field
(Maharashtra, Gujarat, Rajasthan)(Field
Dependency)
5. **City:** (Take Any City for Field
Dependency)
6. **Annual Amount To Be
Paid**

Activity3:

Creata Field for Rent

1. **Rent** (Auto Number while
creatinng the object)-R-{0000}
2. **RentalCity:** Select the Text
as the Field Data Name (Any City)

a **RHK type** (picklist)

Activity4:

create Field for Loan

1. Loan Id Auto generated Field
Take it as Autonumber LN-{0000}

2. Interest Rate: (Select the Field
Data Type As Currency)

3. Term:(select the Field Data
types as number)

4. Annual Loan Field create the
number as the field data type

5. Total Loan Instalments: (field
create the Number as the field data
type)

6. Loan Repayment: (Field create
the Number as field data type)

7. Loan Amount(Select the field
data type as Formula)

8. For the Loan object- Go
to the fields and
relationship and select the
formula in field data type.
In Formula option
select Advanced formula

8. For the Loan object- Go to the fields and relationship and select the formula in field data type. In Formula option select Advanced formula and write the following formula

(Loan Repayment-

$$c * (((1 + (\text{Interest-rate} - c / 52^{\text{Term}-c - 1})) \times ((\text{Interest-rate} - c / 52^{(1 + \text{Interest-rate} - c / 52))^{\text{Term}-c}))$$

Check the syntax below whether the formula syntax is correct or not

Milestone 6: Profile

A Profile is group of settings and permissions the define what a user can do in salesforce.

Profile controls "Objects Permissions, field permissions user permissions, Tab setting, App settings, Apex class access, Visualforce page access, page layouts, Record types Login IP ranges,

You can define profiles by the user's job function for example System Administrator, Developer, sales Representative.

2. custom profiles:

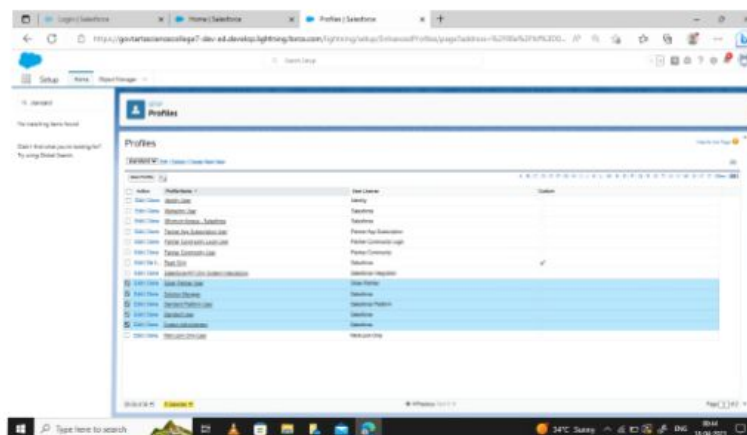
Custom ones definrd by us.

They can be delated if there are no users assigned with the particular objects available on the platform.

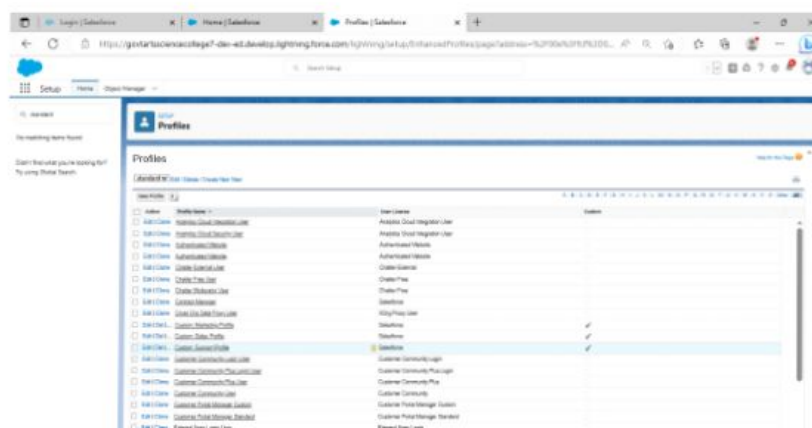
Activity1:

To create a new Profile:

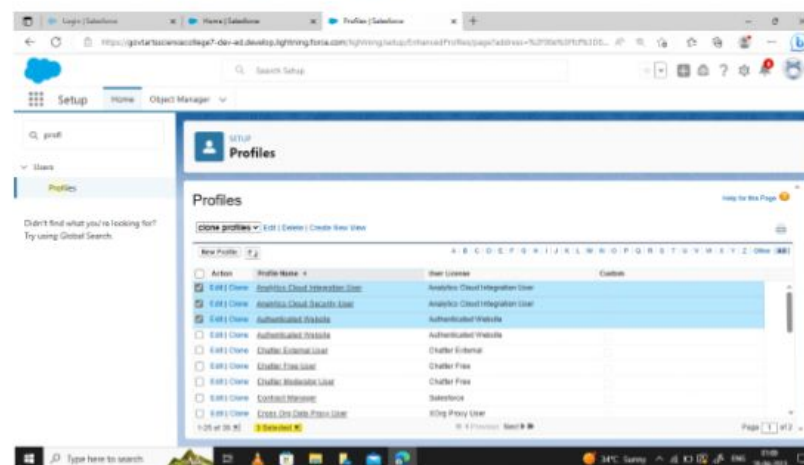
1. Go to setup- type profile in quick find box- click on profile- clone the desired profile (Standard user in prefarble)- enter profilr name- Save



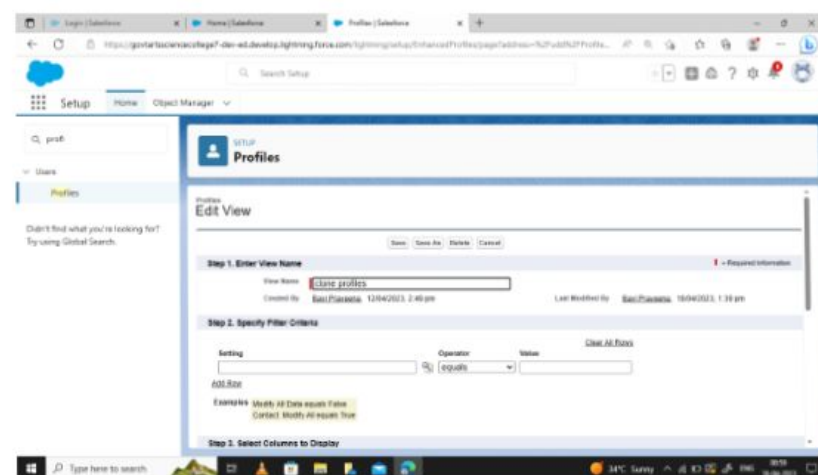
2. Enter a Profile Name

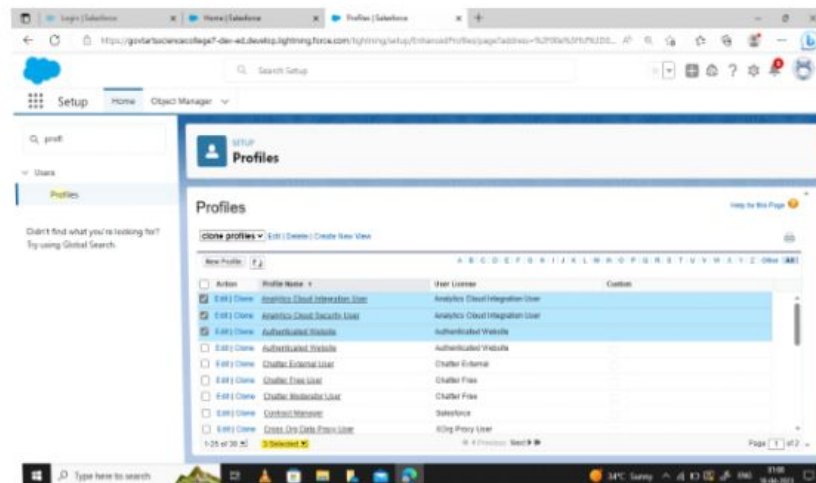


The screenshot shows the GitHub Profiles page for the user 'david'. The page displays a list of profiles, including 'david', 'david1', 'david2', 'david3', 'david4', 'david5', 'david6', 'david7', 'david8', 'david9', 'david10', 'david11', 'david12', 'david13', 'david14', 'david15', 'david16', 'david17', 'david18', 'david19', 'david20', 'david21', 'david22', 'david23', 'david24', 'david25', 'david26', 'david27', 'david28', 'david29', 'david30', 'david31', 'david32', 'david33', 'david34', 'david35', 'david36', 'david37', 'david38', 'david39', 'david40', 'david41', 'david42', 'david43', 'david44', 'david45', 'david46', 'david47', 'david48', 'david49', 'david50', 'david51', 'david52', 'david53', 'david54', 'david55', 'david56', 'david57', 'david58', 'david59', 'david60', 'david61', 'david62', 'david63', 'david64', 'david65', 'david66', 'david67', 'david68', 'david69', 'david70', 'david71', 'david72', 'david73', 'david74', 'david75', 'david76', 'david77', 'david78', 'david79', 'david80', 'david81', 'david82', 'david83', 'david84', 'david85', 'david86', 'david87', 'david88', 'david89', 'david90', 'david91', 'david92', 'david93', 'david94', 'david95', 'david96', 'david97', 'david98', 'david99', 'david100'. The page also shows a search bar and a 'Follow' button.



⌊





6. Sales manager- Standard user profile , marketing executive and executive-2- standard platform user , marketing manager- standard platform user for Activity2:

1. Then in the profile level give read and create access to marketing executive and read, create, edit, delete, for the marketing manager

2. Marketing manager should have access to marketing executive

Activity3-sales:

1. in the profile level sales manager is having create edit, profile delete

2. For sales rep1- read, create, edit

3. For sales rep2- read, create, edit

4. For sales rep3- read only

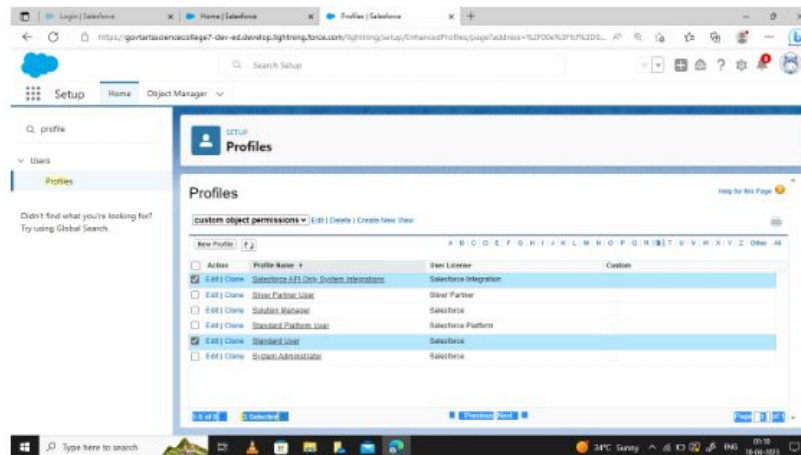
Milestone7: New User

every user in salesforce has a user account. the user account identifies the user and the user account setting determined What features and records the user can access

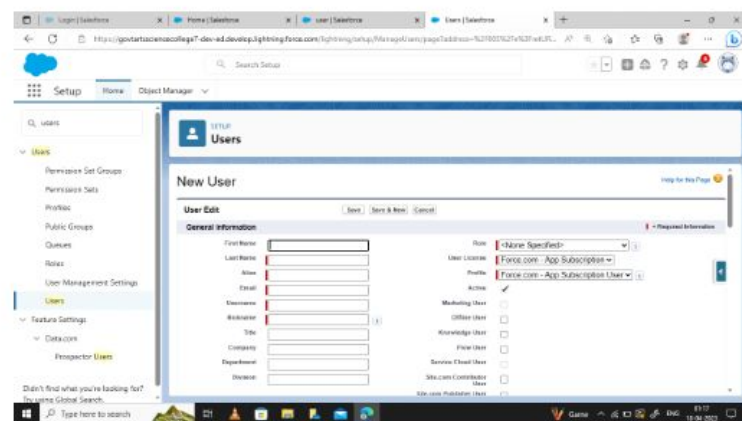
Activity1:

Create user

1. Go setup- types user in quick find box-select to user- lick new users



2. fill in the fields (1st name , last name , alias, email id, user name ,nick name ,role,user license, profile)-save



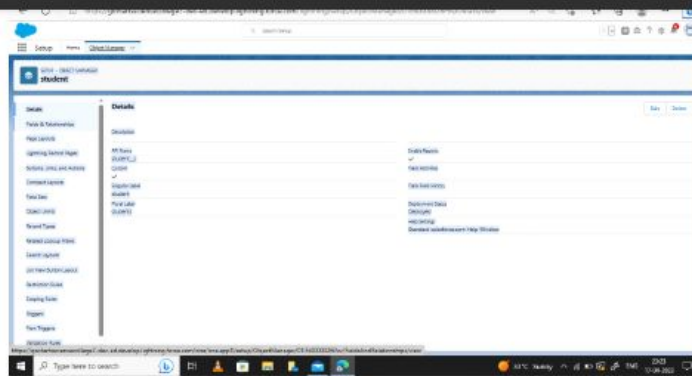
Milestone8-permission set

A permissions set is a collection of settings and permissions that give users access to various tools and functions. Permissions sets extend users' functional access without changing the profile user can have only one profile but, depending on the Salesforce edition, they can have multiple permissions.

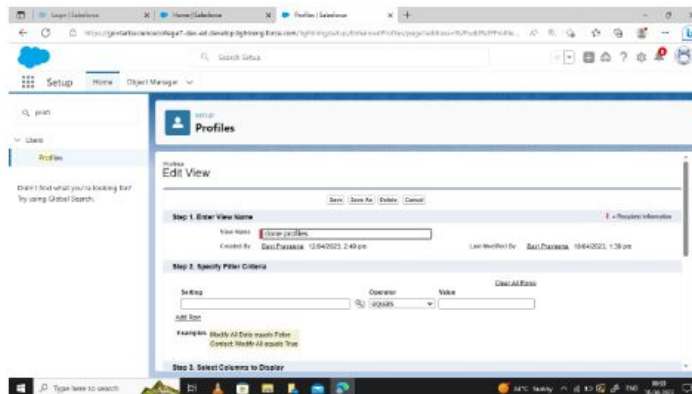
Activity1:

create the permissions sets

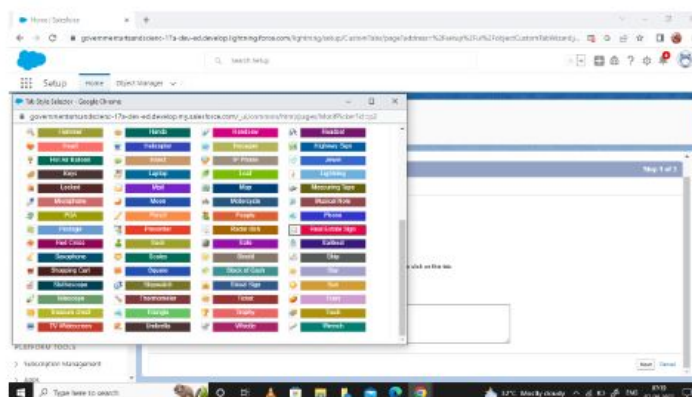
1. Go to setup- type "permissions sets" in quick search - select permissions sets - New



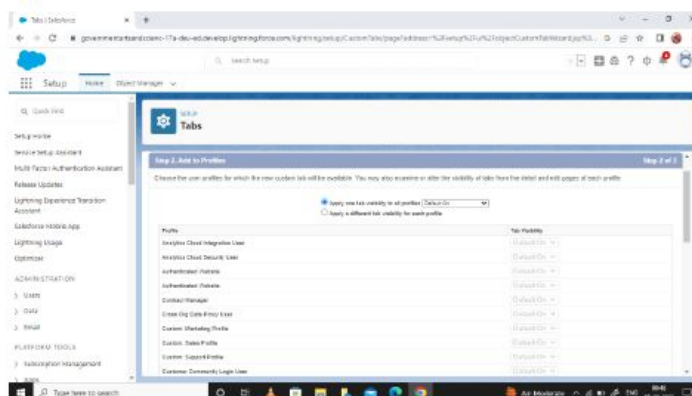
2. Enter the label name -Save.

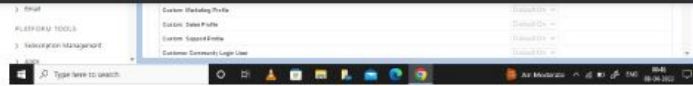


3. After saving the permissions click on the manage assingment



4. now click on the add assingment





Milestone9:set for OWD

organization - wide defaults , or OWD, are the pattern security roles that you can follow your sales force instance. organization OWD are utilized to confine who can access what information in your CRM. you can award access through different methods that we will discuss later (sharing principle , Role sales teams, the account group, manual sharing and fourth)

Primarily, there are four level access that can be set in salesforce OWD and they are

public read / write /transfer(only available of leads and cases)

public read/write

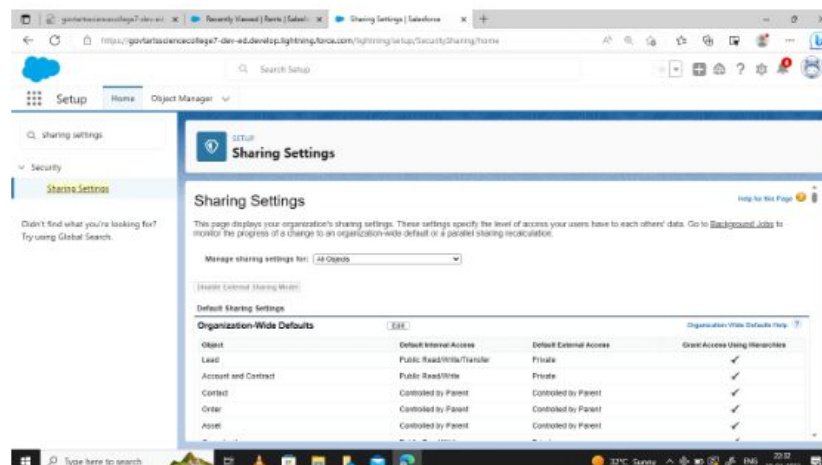
public read/only

private

Activity1

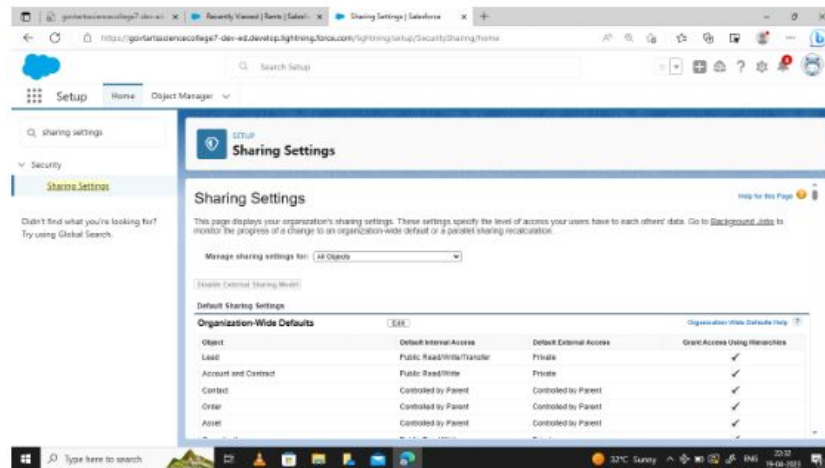
create OWD setting

- 1.setup,use,the click find box to find sharing settings
- 2.click edit in the organization -wide defaults area
3. for each object,select the difficult access you want to give everyone.
- 4.to disable automatic access to using your deselect grant access using hierarchies for lead , and custom object.



5. click edit and from the drop downselect private for internal and external

5. click edit and from the drop downselect private for internal and external



6.this setting is for all the user which have been created

Activity 2:

Marketing

1. create the record level OWD setting give it as A private to marketing manager and marketing executive

sales:

1. sale manager OWD is set as private similarly sales rep
1,sales rep2,same OWD for them

Milestone10-Report

Reports give you access to your salesforce data . you can examine your salesforce data in almost infinite combinations display it in easy to understand formates , and sharing reports ,review these reporting basics.

types of reports in salesforce

Tabular

Summary

Matrixx

Joined reports

Activity 1:

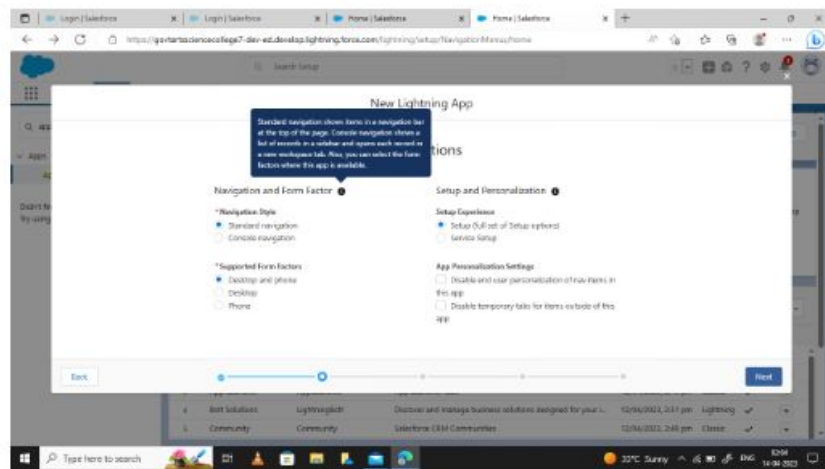
create report



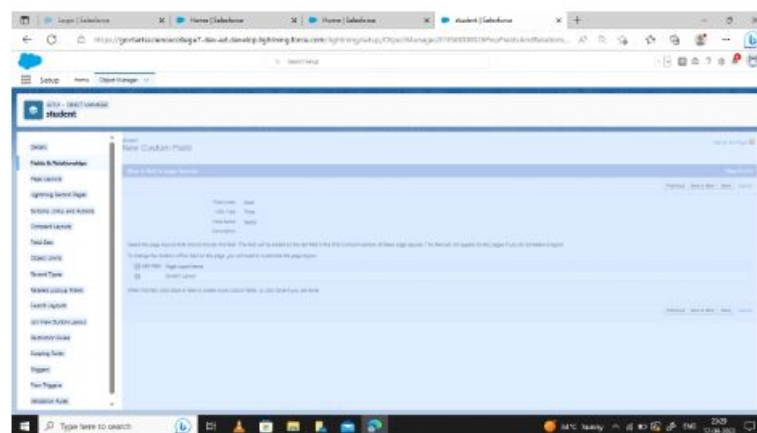
Joined reports

Activity 1:

create report

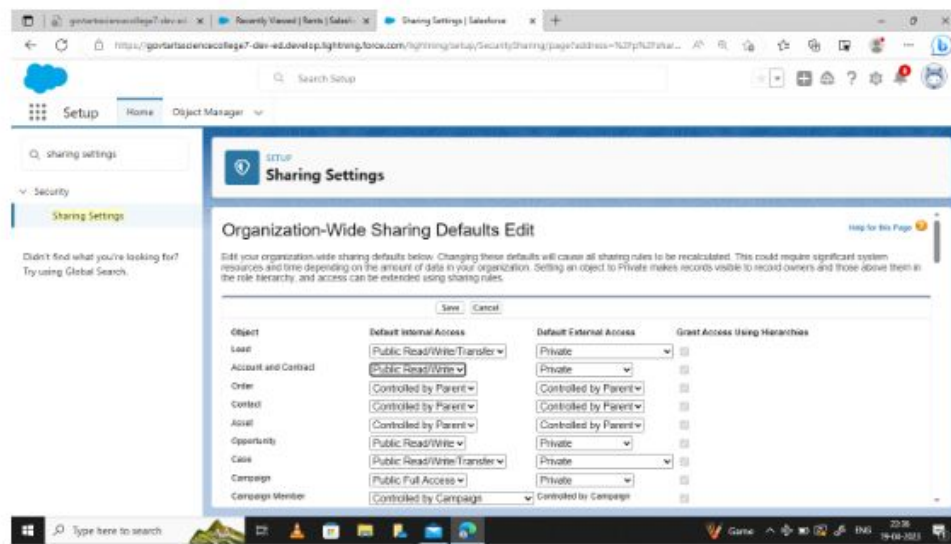


1.Go the app - click on the reports tab



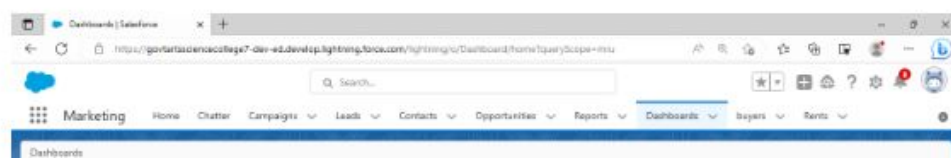
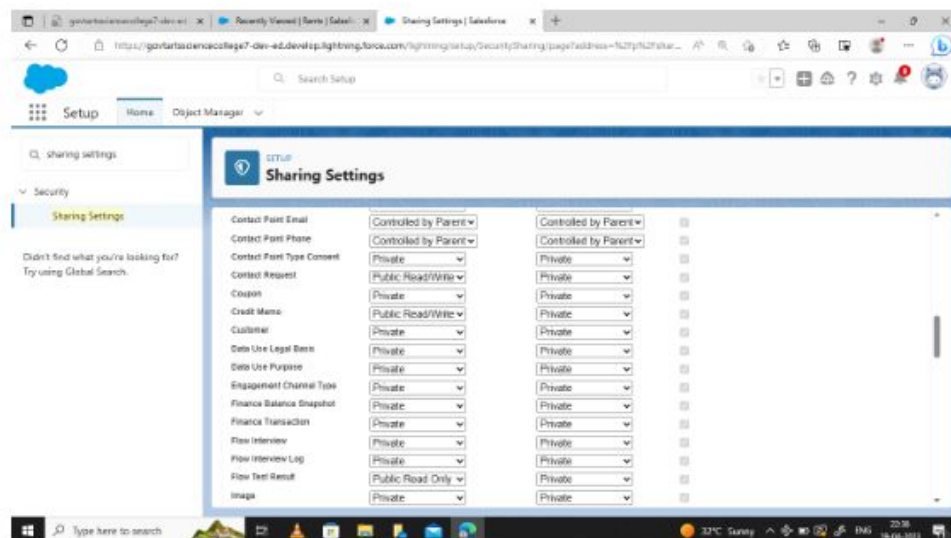
2.click the app- click on the reports ta

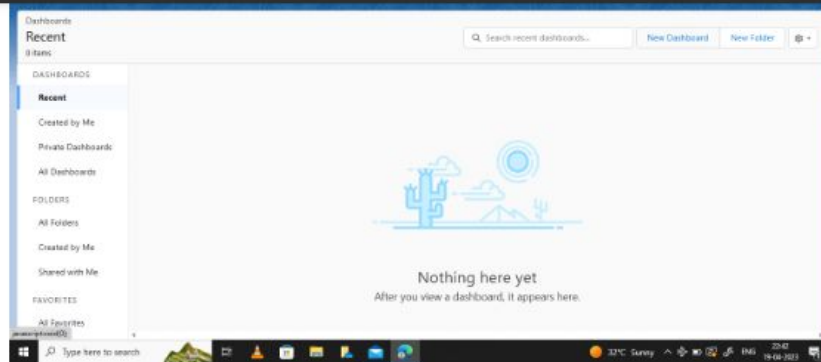
2. click New Reports



3. Select reports from category or from reports type panel or from search panel- click on start report

4. Customize your reports, the save on run it





create report for following conditions

1. create the report of the total number of loan passed for getting the amount for the property
2. two conditions should be like loan amount $\geq 5000\$$

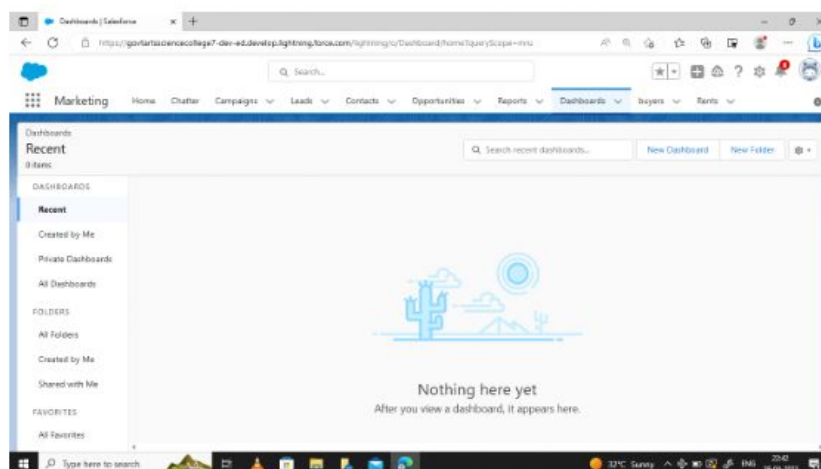
Milestone 11- Dashboards

Dashboards help your visually understand changing business conditions so you can make decisions based on the real-time data you have gathered with reports. Use dashboards to help you identify trends, sort out quantities, and measure the impact of their activity. Before building, reading and sharing dashboards, review this dashboard basic

Activity1:

create dashboards

1. Go to the app Launcher and select the Dashboards
2. select add components



Trailhead profile public URL

Team Lead- <https://trailblazer.me/id/anandhi9>

Team Member1- <https://trailblazer.me/id/gowsalya1>

Team Member2- <https://trailblazer.me/id/bpraveena3>

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Team Member3- <https://trailblazer.me/id/elavarasi6>

Project Report Templat

5. ADVANTAGES& DISADVANTAGES

Time -consuming if you choose the wrong system.....

Might seem expensive for a small business....

Training(cost and time).

APPLICATIONS

bookings

check-in and check- out

event planining.

CONCLUSION

In conclusion property management system (PMS)software is very crucial the hotels especially opera PMS constudeted the most appropriate PMS software hildon athenes .thhe disadvantages of the opera PMS in the improte esily and meationed before recommentaions is upgrate of opera V5 to opera9.

FUTURE SCOPE

Trationlally , a hotel property management system was defined as a system that

Might seem expensive for a small business....

Training(cost and time).

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FUTURE SCOPE

Trationlally , a hotel property management system was defined as asystem that enabled a hotel or group of hoteles to manage frount -office cabilityes , such as bokking reservations, guest check-in /checkout,room assingment, manning room rates and billing

