PROJECT REPORT ON

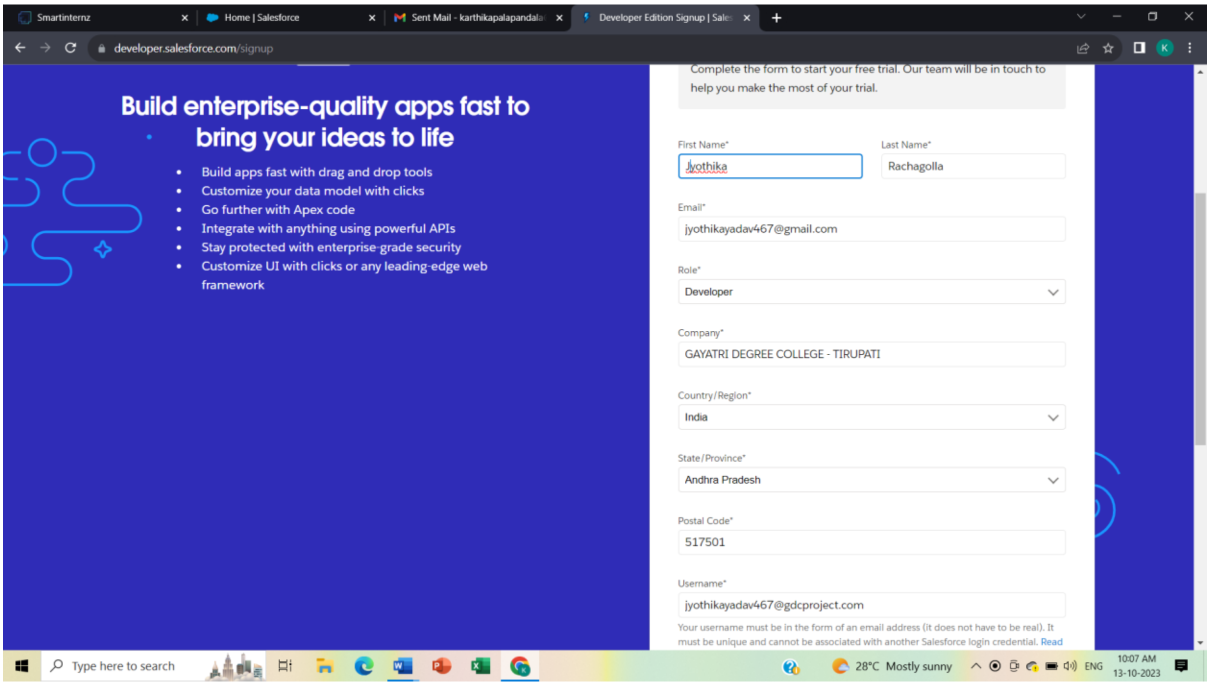
Property Management Application using Salesforce - (developer) - (Short-term)

INTRODUCTION

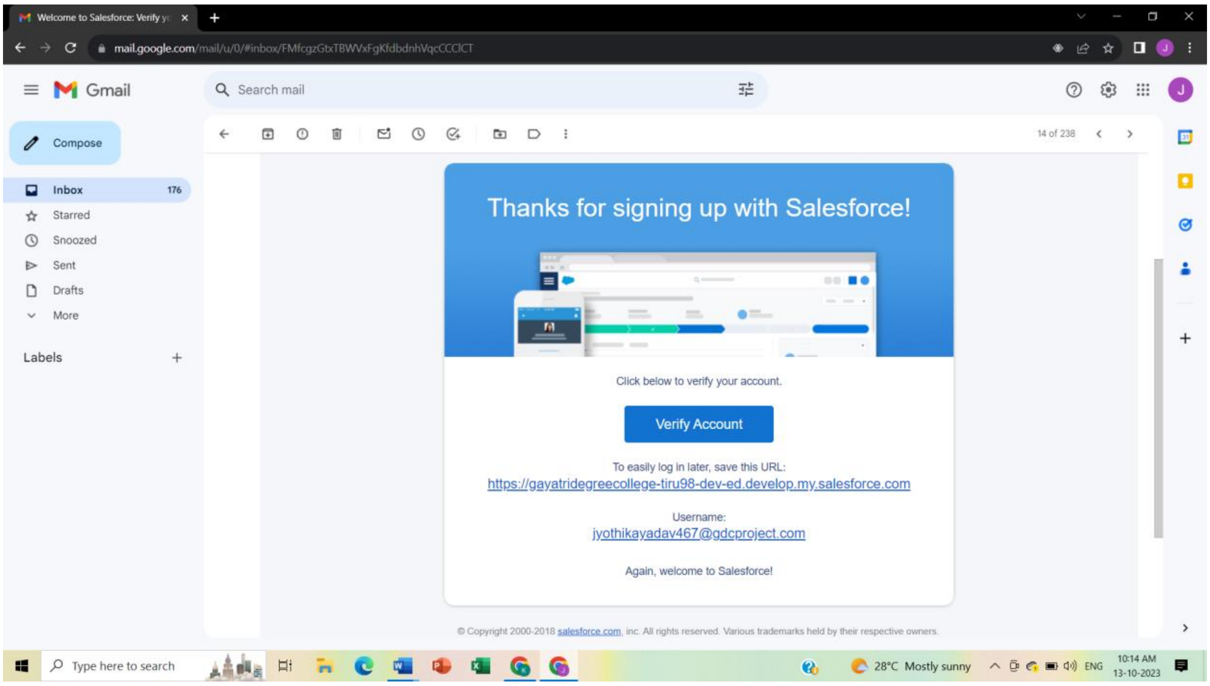
Develop an App for the Property Management where Buyer can order his Requirements and get the Appropriate Details of the Property. According to his interest just provide him with some discounts up to what extent he can get the discount. Also Track Whether he is Interested in taking the loan available for so just calculate how much loan Amount user can get it. Provide the Security for two different profiles like for marketing and sales 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 deal.

Milestone-01 : Introduction & Creation Salesforce Org

- **Creating a developer org in salesforce**
  - Go to developers.salesforce.com/Signup
  - Click on sign up.
  - On the sign up form, enter the following details :
  - First name & Last name : jyothika & Rachagolla
  - Email : Jyothikayadav467@gmail.com
  - Role : Developer
  - Company : Gayatri degree college
  - County : India
  - Postal Code : 517501
  - Username : jyothikayadav@gdcproject.com
  - Click on sign up after filling this

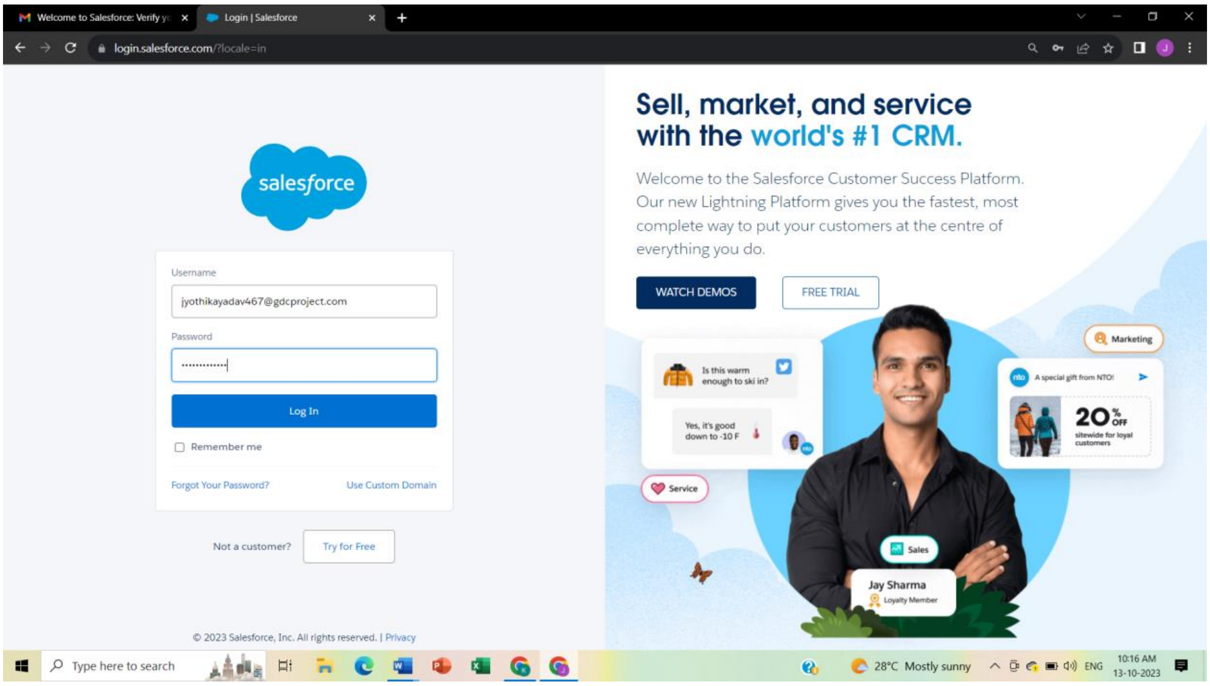


- Account Activation



- Login to your Salesforce Org
- *Salesforce Login:*

  https://login.salesforce.com



Milestone-02 : Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Lead
6. Plural Label: Leads
7. Record Name: Customer name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save

- In the same way create 2 more objects as Property, Loan.
- **Creation of object: Property**

    1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

4. On the Custom Object Definition page, create the object as follows:

5. Label: Property

6. Plural Label: Properties

7. Record Name: Property Name

8. Check the Allow Reports checkbox

9. Check the Allow Search checkbox

10. Click Save.

- **Creation of object: Loan**

1. To create an object:

2. From the setup page , Click on Object Manager then Click on Create and then Click on Custom Object.

3. Label :Loan

4. plural label: Loans

5. Record Name: Loan Id

6. Data Type: Auto Number

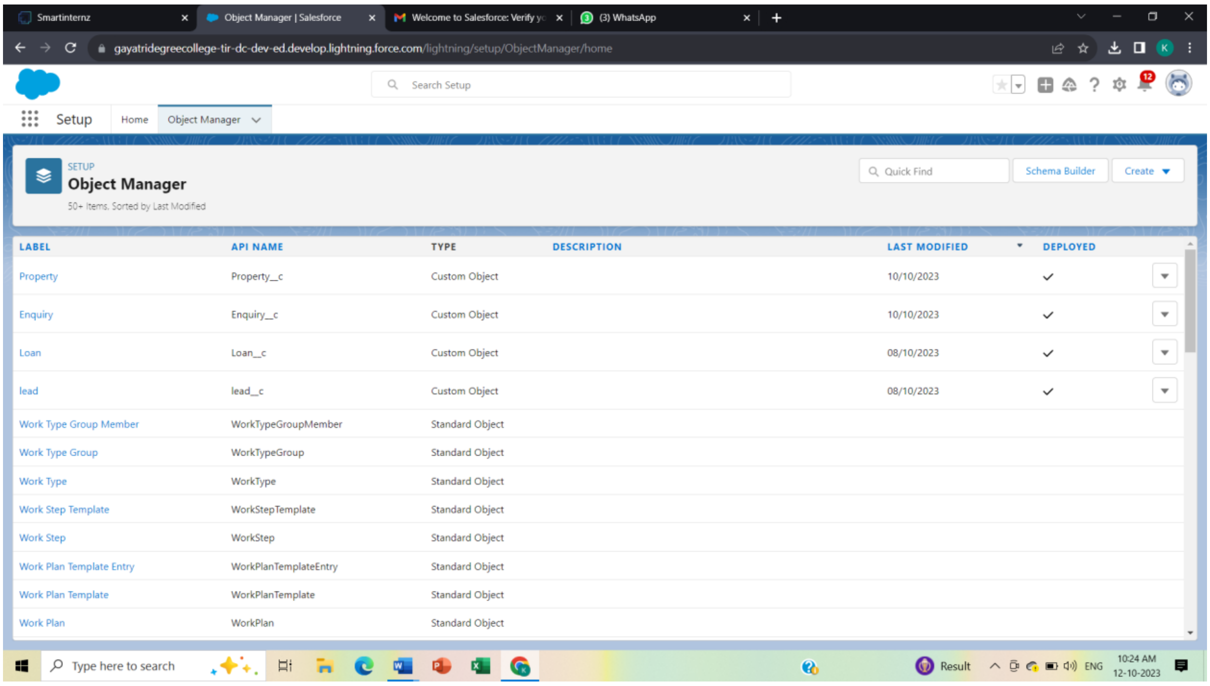
7. Display Formate: LN-{0000}

8. Starting Number: 0001

9. click on Allow reports

10. Allow search and save

- **OBJECTS CREATED:**



Milestone-03 : What Is A Tab ?

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Create A Tab For Enquiries Object

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Enqiry.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save

Create A Tab For Lead Object

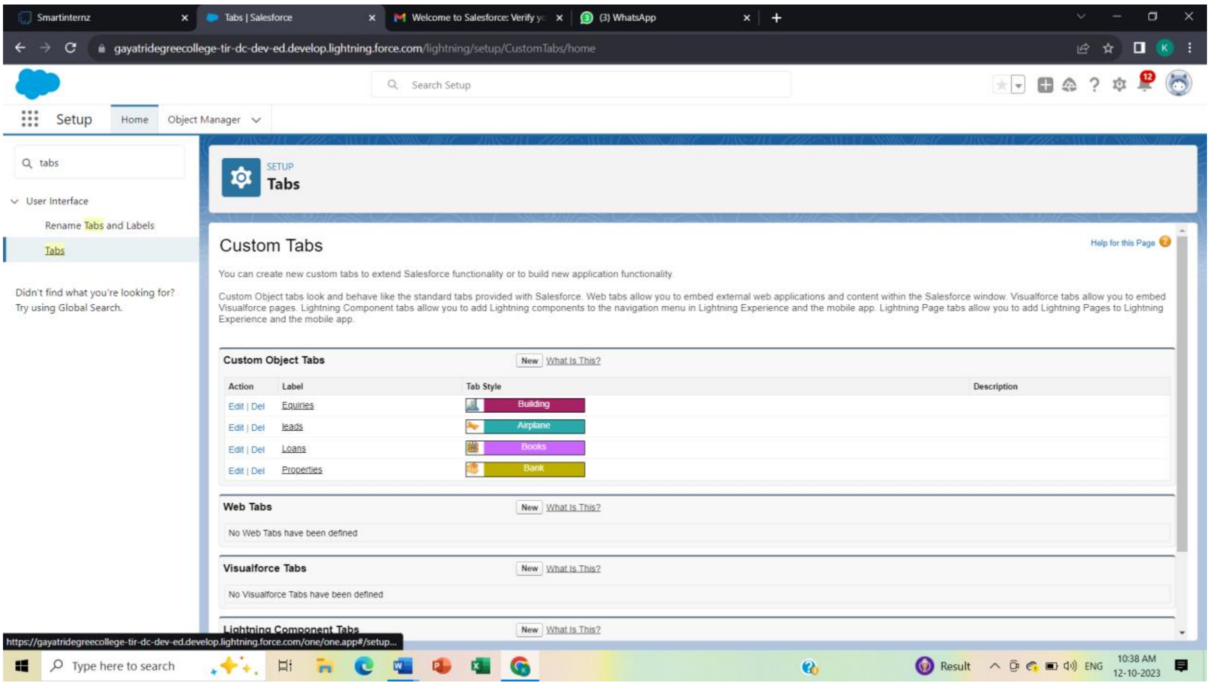
1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Lead.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save

Create A Tab For Property Object

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Property.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save

Create A Tab For Loan Object

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Loan.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save

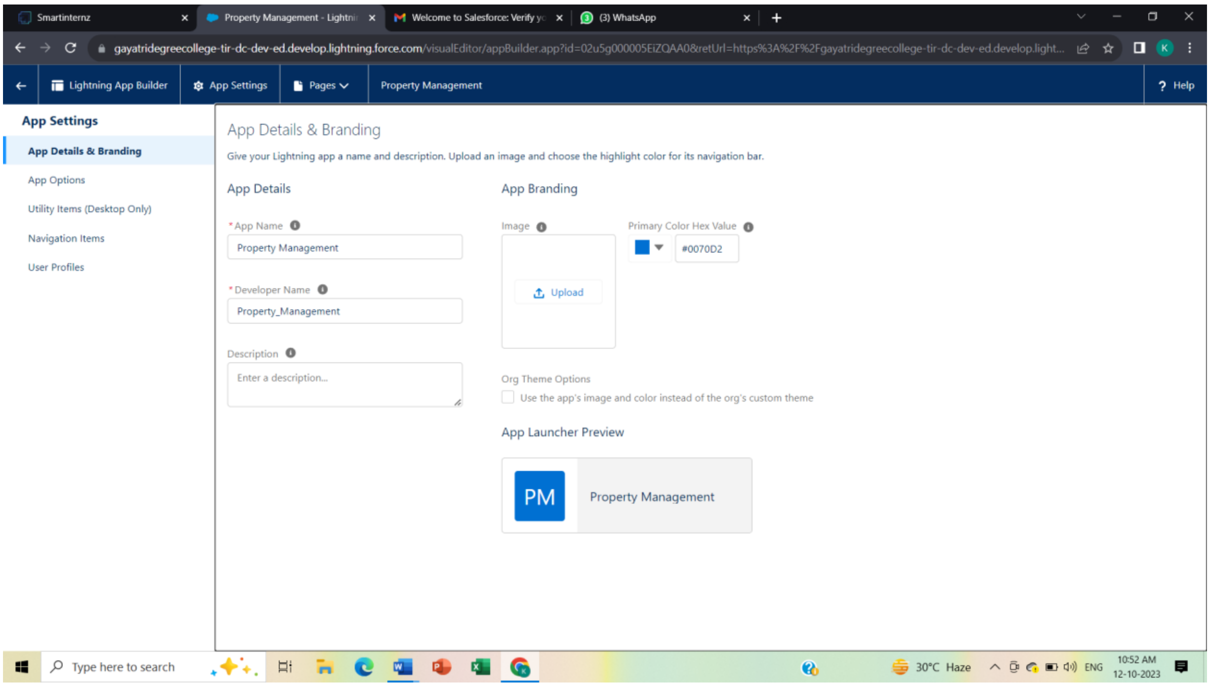


Milestone-04 : The Lightning App

- ❖ **Create The Lightning App**

  1. From Setup, enter App Manager in the Quick Find and select App Manager.

2. Click New Lightning App.
3. Enter Property Management as the App Name, then click Next
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Lead, Property, Loan, Report, Dashboard move them to Selected Items. Click Next. select System Administrator and move it to Selected Profiles.Click Save & Finish.
7. From Available Profiles, select System Administrator, Salesforce platform user, Standard User and move it to Selected Profiles.Click Save & Finish.

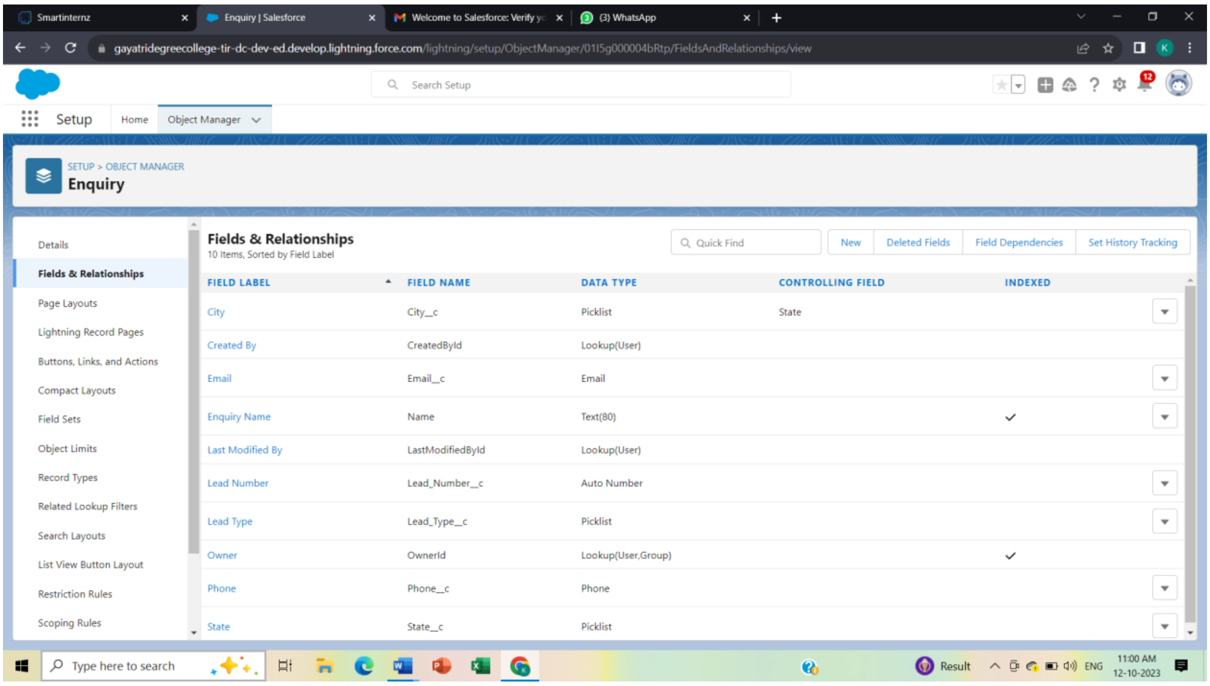


Milestone- 05 : Fields And Relationship

❖ **Creation Of Fields For Enquiry object**

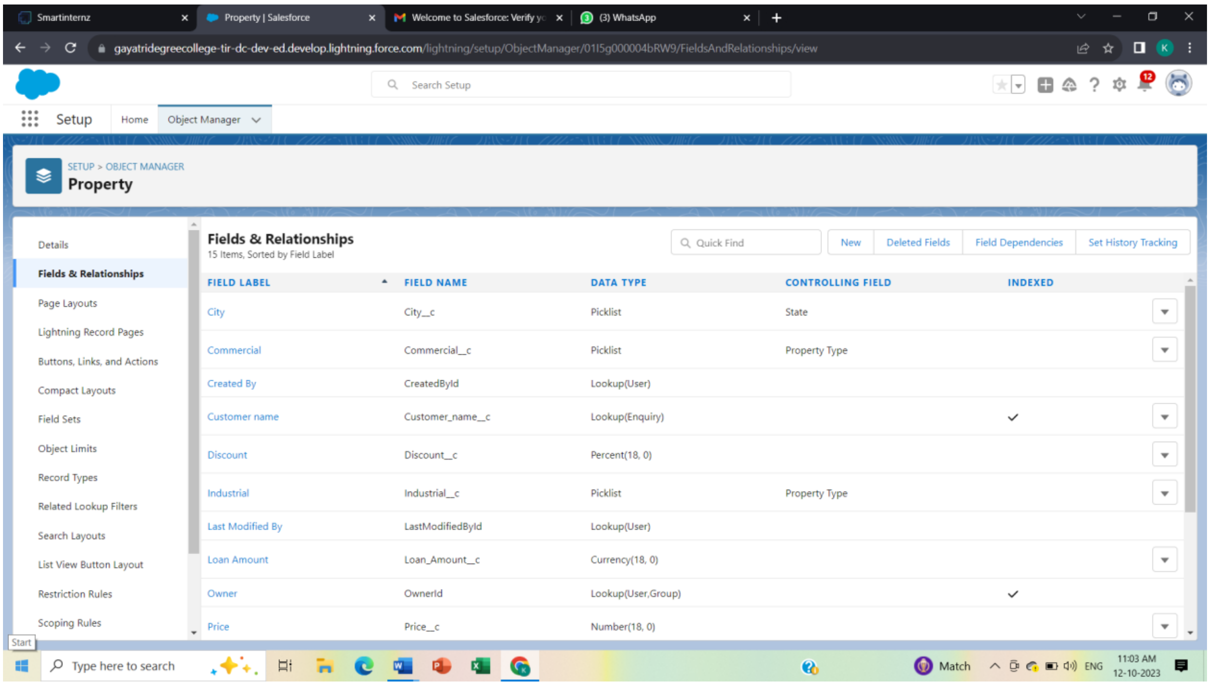
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Enquiry
4. Select Fields & Relationships from the left navigation

5. Click New
6. Select the Text as the Data Type, click Next.
7. For Field Label, enter Tracking ID & length = 40.
8. Click Next, Next, then Save & New.



- **Creation Of Fields For Property object**

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Property
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text as the Data Type, click Next.
7. For Field Label, enter Tracking ID & length = 40.
8. Click Next, Next, then Save & New.



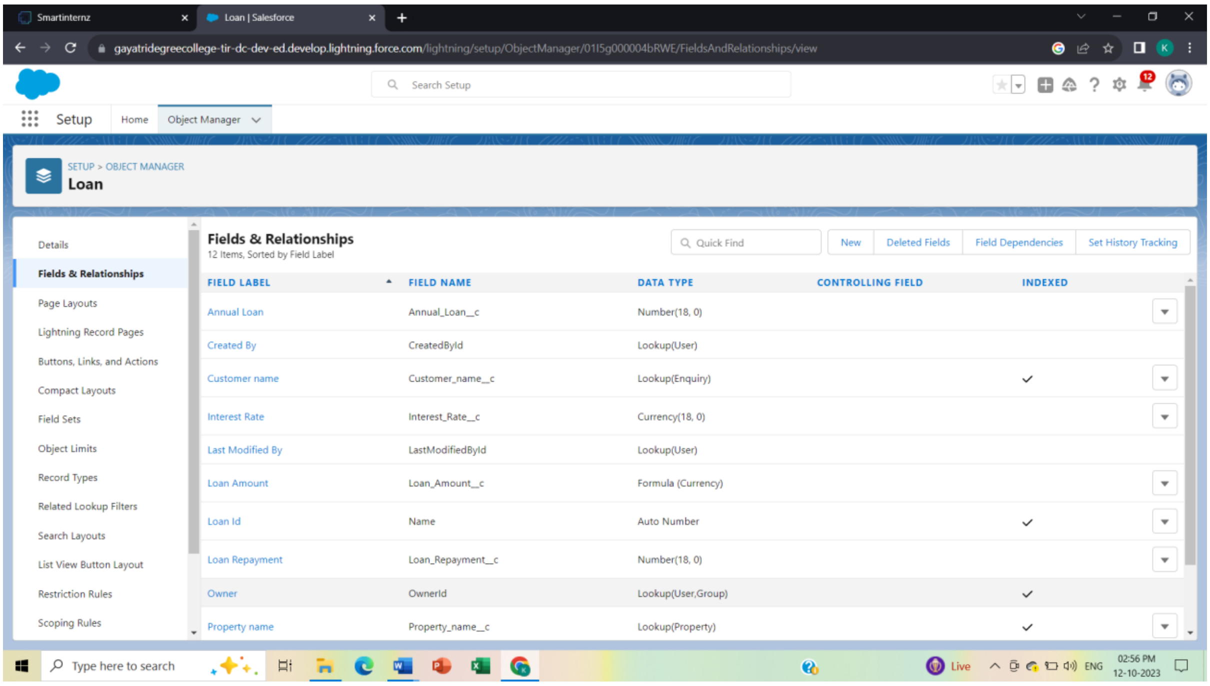
❖ Creation Of Fields For Loan object

1. Property name: (lookup relationship related to property)
2. Customer name: (lookup relationship related to Enquiry)
3. Interest Rate: (Select the Field Data Type As Currency)
4. Term: (Select the Field Data type as Number)
5. Annual Loan: Field create the Number as the field data type
6. Total Loan Installments: (Field create the Number as the field data type)
7. Loan Repayment: (Field create the Number as the field data type)
8. Loan Amount: (Select the Field data type as Formula)

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

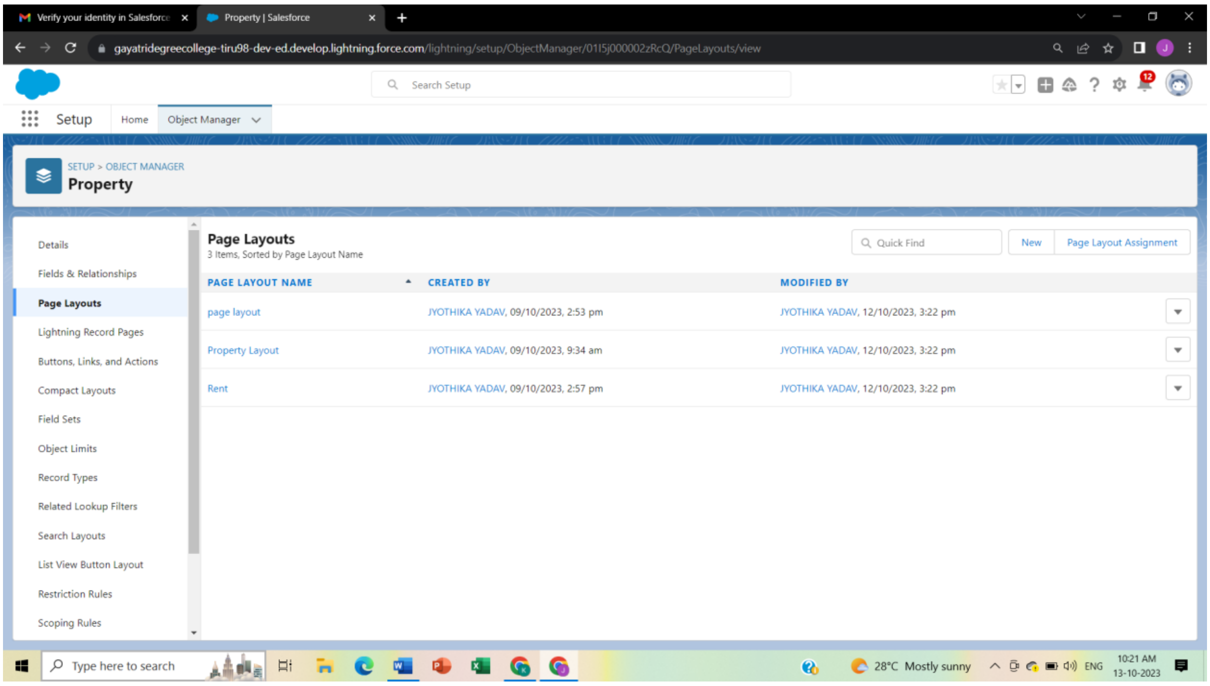
(Loan_Repayment__c* (((1+(Interest_Rate__c/52))^ Term__c) -1))/((
Interest_Rate__c/52)*((1+(Interest_Rate__c/52))^ Term__c))

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



Milestone-06 : Page Layout and Record type

- **Creation of page layout for property object**
    1. Go to setup
    2. click on Object Manager
    3. type object name in search bar
    4. click on the object
    5. Now click on “Page Layout”
    6. New.
    7. Create the page layout name as “Property”
    8. And save



- **Creation of Rent page layout**

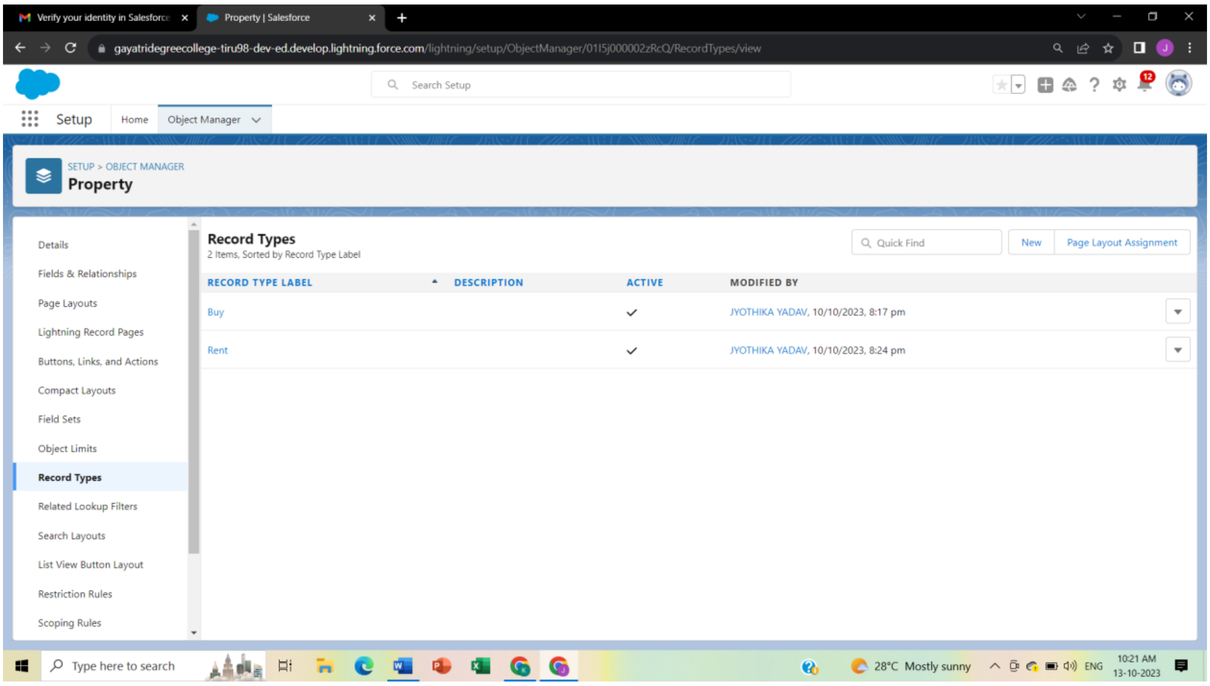
  1. Go to setup
  2. click on Object Manager
  3. type object name in search bar
  4. click on the object
  5. Now click on “Page Layout”
  6. New.
  7. Create the page layout name as “Rent”
  8. And save

- **Creation of Record Type for Property Object**

  1. Go to setup
  2. click on Object Manager
  3. type object name in search bar
  4. click on the object
  5. Now click on “Record type ”
  6. New.
  7. Enter the record type label as (Buy) and
  8. selective active checkbox
  9. next and save

➢ **Creation of Record Type for Rent Object**

1. Go to setup
2. click on Object Manager
3. type object name in search bar
4. click on the object
5. Now click on “Record type ”
6. New.
7. Enter the record type label as (Rent) and
8. selective active checkbox
9. next and save



➢ **Page Layout Assignment**

1. Go to setup
2. click on Object Manager
3. type object name in search bar
4. click on the object
5. Now click on “page layout ” click page layout assignment
6. Select the buy record type and
7. select page layout to use(buy) then

8. click on save

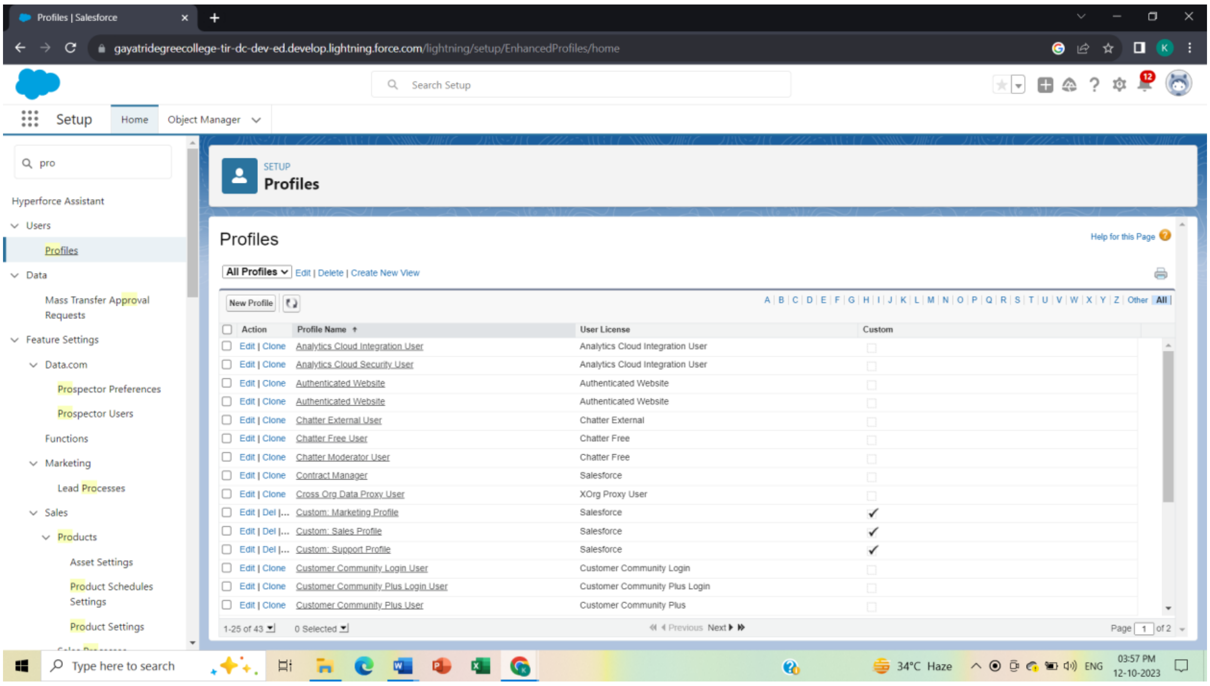
- **Page Layout Assingnment for Rent**

1. Go to setup
2. click on Object Manager
3. type object name in search bar
4. click on the object
5. Now click on “page layout ” click page layout assignment
6. Select the buy record type and
7. select page layout to use(buy) then
8. click on save

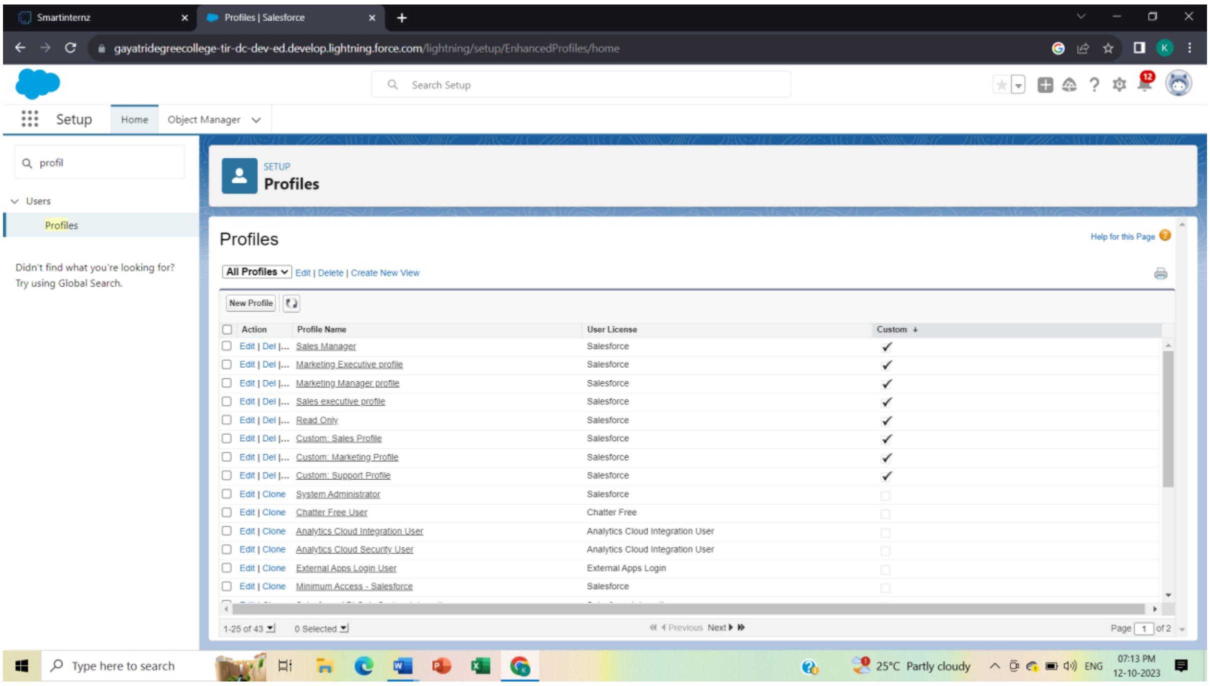
Milestone- 07: Profile

- **Create A New Profile**

1. Go to setup
2. type profiles in quick find box
3. click on profiles
4. clone the desired profile (standard user is preferable).
5. Enter a Profile Name (Sales Manager)
6. And click on Save
7. Click on the new created profile
8. While still on the profile page, then click Edit.
9. Scroll down to Custom Object Permissions and
10. Give view all access permissions for Lead, Property, Loan
11. and save (Sales Manager also Having Create, Edit, Delete for Lead, property, loan objects)
12. Create Remaining ProfilesFollow the Above Steps to create the Profile just change the Name for below profiles Clone profile (Standard Platform User) for below all profiles
13. (a). Marketing Executive profile (b). Marketing Manager profile



- **Create Marketing Executive Profile**
    1. In The Profile Level Give Read and Create Access for Lead, property, loan objects to Marketing Executive profile and Read, Create, Edit, Delete for the Marketing manager profile for Lead, property, loan objects
    2. Marketing Manager profile Should Have Access to Marketing Executive profile
- **Create Sales Executive Profile**
    1. to create the Profile just change the Name for Below profiles clone profile (StandardPlatform User) , profile name (Sales executive profile).
    2. And assign a sales rep1 permission set
    3. For Sales Rep1 : Read, Create, Edit for lead, property and loan objects.
    4. For Sales Rep3: Read only.



❖ Milestone- 07: User

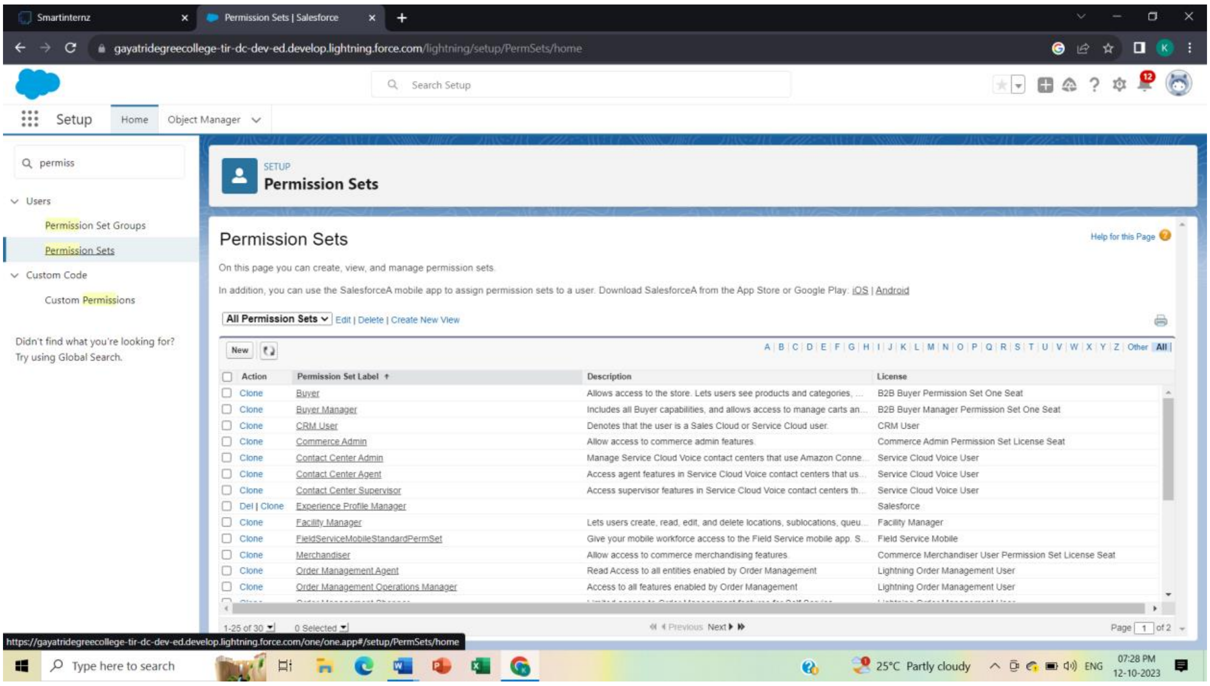
➢ Create User

1. Go to setup
2. type users in quick find box
3. select users
4. click New user. Fill the details
5. First Name: Sunny
6. Last Name: Gupta
7. Alias: Sanj
8. Email: provide your personal email id for future reference
9. Username: sunnygupta@thesmartbridge.com
10. Nickname: Sunny
11. Role: leave it as default
12. User License: Salesforce
13. Profile: Sales Manager and Click Save Button

❖ Milestone- 07: Permission set

1. Go to setup and type "permission sets" in quick search
2. select permission sets and click on New
3. Enter the label name (Sales Rep Advance) and save
4. Select Object settings, Search object property and select property object. and click Edit button
5. In Object Permission we give View all permission. And click save button
6. Repeat 4th and 5th steps for Enquiry and Loan objects.
7. After saving the permission click on the Manage assignment
8. Now click on the Add Assignment

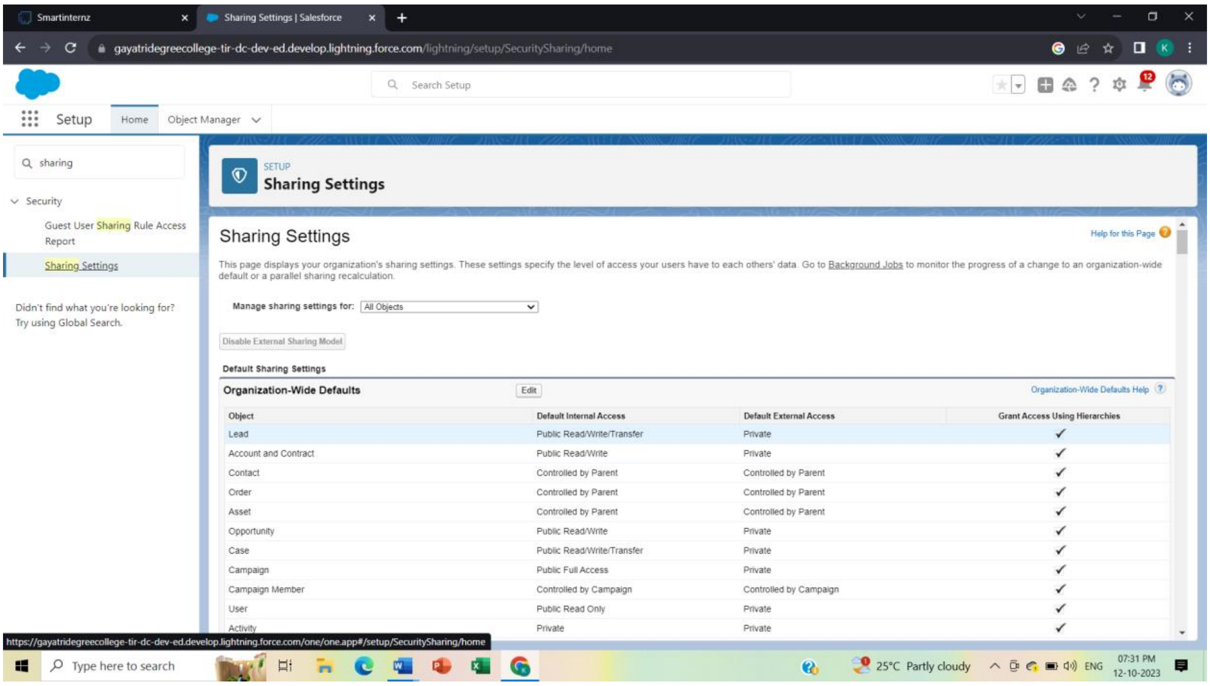
9. Now select the user (sunny) and click on next & assign.



❖ Milestone- 07: Permission set

➢ Create OWD Setting

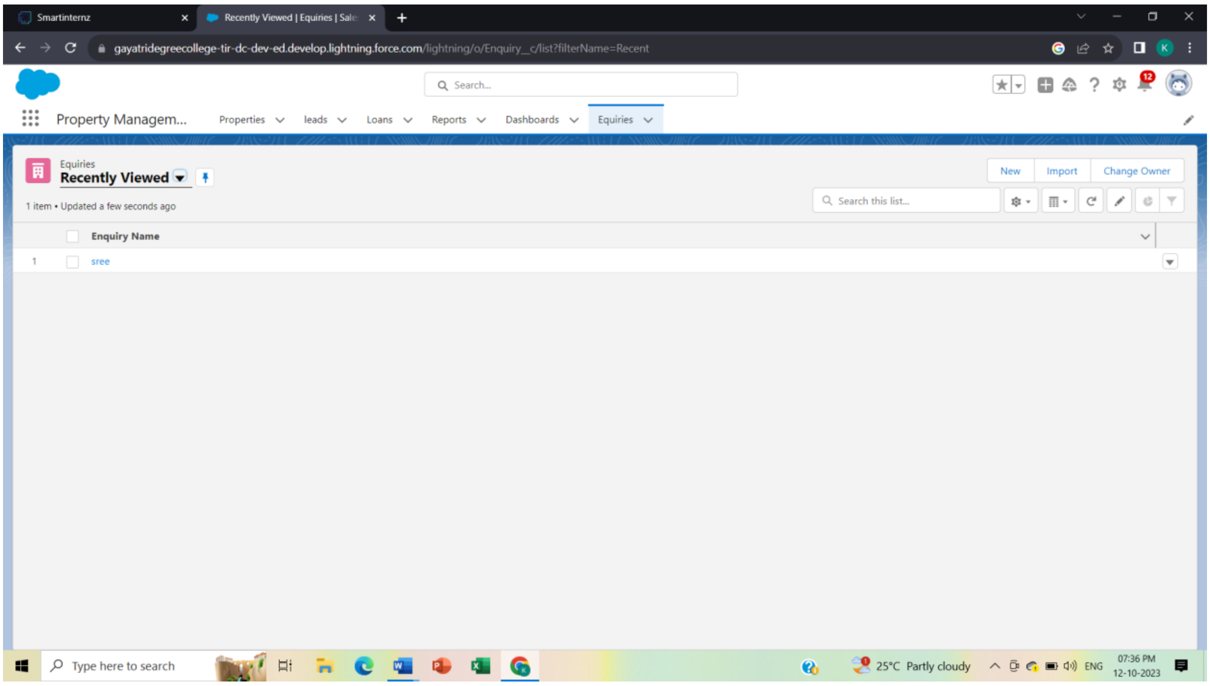
1.Setup, use the Quick Find box to find Sharing Settings.
2.Click Edit in the Organization-Wide Defaults area.
3.For each object, select the default access you want to give everyone.
4.To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Enquiry, Property custom object
5.Click Edit and from the Drop Down select private for internal and external
6.This Setting is for all the User Which have been Created



❖ Milestone- 07: Permission set

➢ Create A Record (Enquiry)

1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.
4. Click new and fill details & Save



➢ View A Record (Enquiry)

1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.

4. Click on any record name. you can see the details of the Event

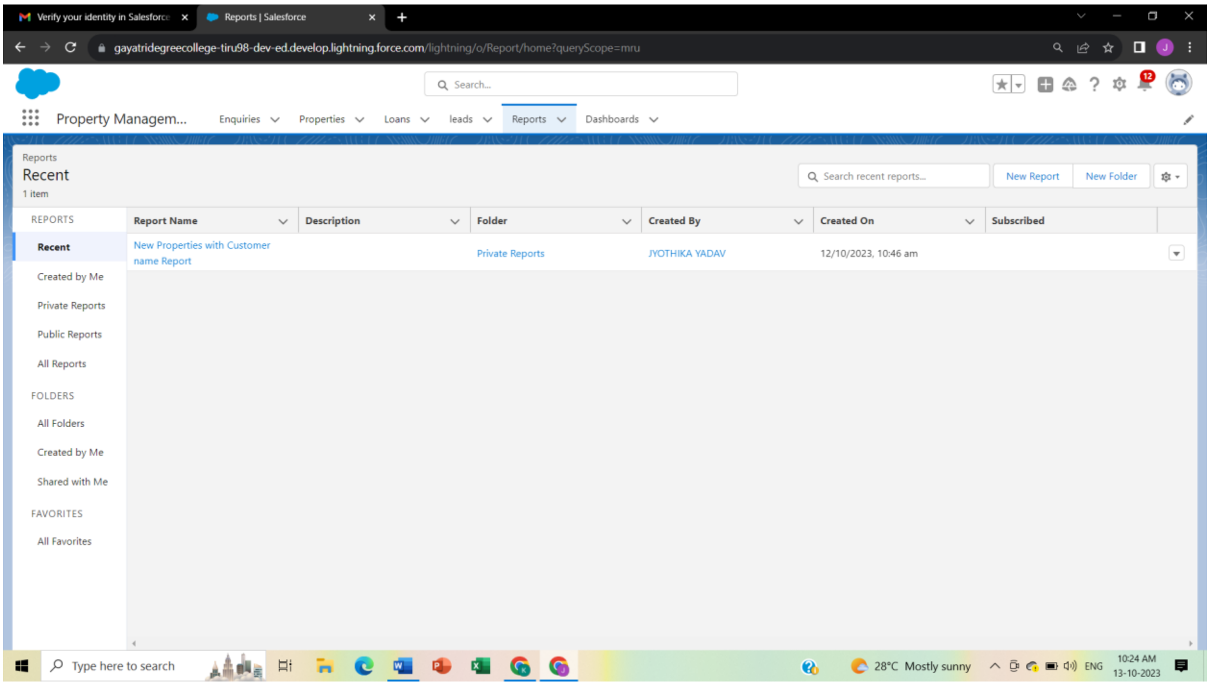
➢ **Delete A Record (Enquiry)**

1. Click on App Launcher on left side of screen.
2. Search Property Management & click on it.
3. Click on Inquiries Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

❖ Milestone- 08: Report

➢ **Create Report**

1. Go to the app , click on the reports tab
2. Click New Report
3. Select report type from category or from report type panel or from search panel (properties with customer name) and click on start report. Customize your report, add fields like property name, customer name, city, property type etc. Click on save& run (Properties with Customer Name Report)
4. Create Report for following Condition
5. Create the Report of the Total Number of Loan Passed for getting the Amount For the Property
6. The Condition should be Like Loan Amount >= to 5000$



❖ Milestone- 09: Dashboards

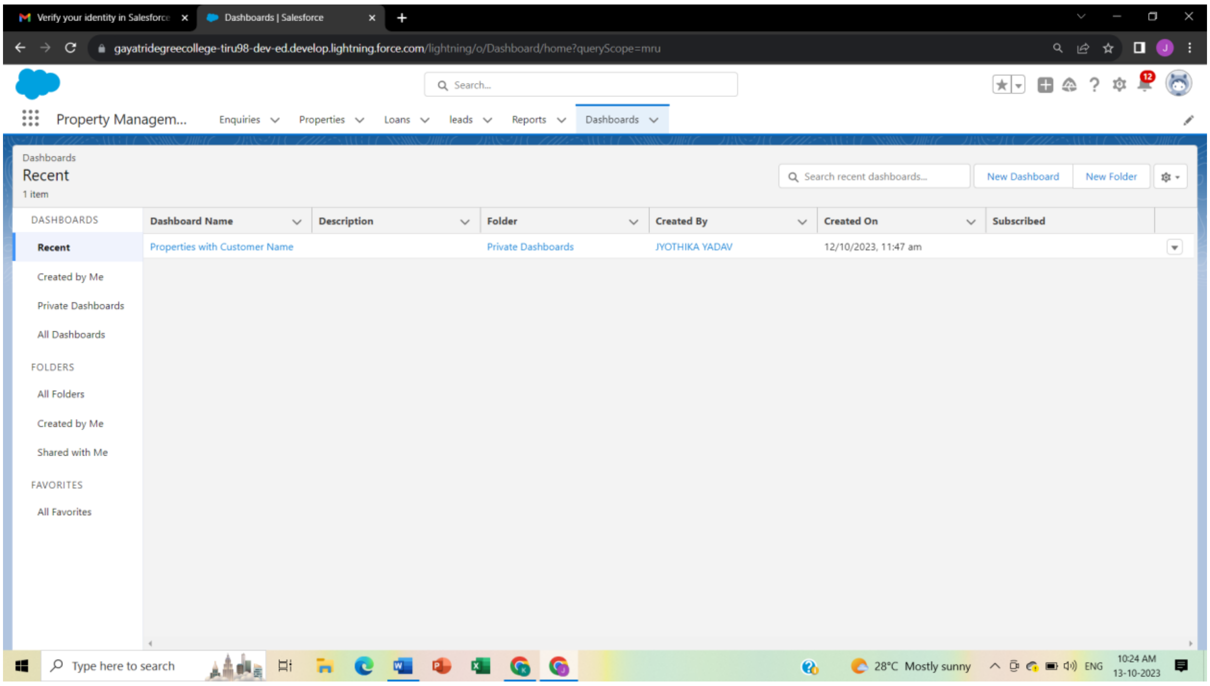
➢ **Create Dashboards**

1.Click the Dashboards tab.

2.Click New Dashboard.
3.Name the Properties with Customer Name Report and click Create.
4.Click +Component.
5.Select the Properties with Customer Name Report and click Select
6.Select the Vertical Bar Chart component (select in which format you want display chart and click Add.
7.Click Save and then Done.

- **Create Dashboards**

  1.Create the Dashboard for the Same Take Any Type of Dashboard(Chart) And Display Icon ,The App Home Page.



❖ Milestone- 10: View Report And Dashboard

- **Report**

  1. Click on App Launcher on left side of screen
  2. Search property management & click on it.
  3. Click on Reports Tab.
  4. Click on Properties with Customer Name & see records

- **Dashboard**

  Dashboards help us visually understand changing business conditions so we can make decisions based on the real-time data we’ve gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

- **View Dashboard**

1.Click the Dashboards tab.
2.Click New Dashboard.
3.Name the Properties with Customer Name Report and click Create.
4.Click +Component.
5.Select the Properties with Customer Name Report and click Select
6.Select the Vertical Bar Chart component(select in which format you want display chart and click Add.
7.Click Save and then Done.

❖ Milestone- 11: Flow Builder

- **Classic Email Template**
  1. Go to the Gear Icon
  2. Click on the home button and Search for the Classic Email Template
  3. Click on the New Template
  4. Name Loan Amount Pay Reminder and Author as the System admin user?
  5. Give Description as Reminder Calls through emails
  6. Clone the email template as the names given below
     - Loan Amount pay Reminder for 24 hrs
     - Overdue by one day
     - Overdue

- **Create The Email Alerts**

  1. Click on the home button and search for the Email Alerts
  2. There Click on the New Email alerts
  3. And give the name as Email For the 24 hrs before and select the email template which we have created for the 24 hrs before There Click on the New Email alerts and give the name as Email For the 24 hrs before
  4. select the email template which you have created for the 24 hrs before and recipient and for all condition is owner
  5. By following the above steps clone the email alerts with the names given below
     - Loan Amount Pay Reminder (Cloned Email Alert)
     - Overdue by one day (Cloned Email Alert)
     - Overdue (Cloned Email Alert)
- **Decision Element**
  1. Than There is Decision for the just click on add and select the Decision order outcome
  2. here are two outcome “Send Email & don’t send the email”
  3. On the outcome is there is the condition for that label don the send email condition Requirement All Conditions are met (AND) , Operator less than 1

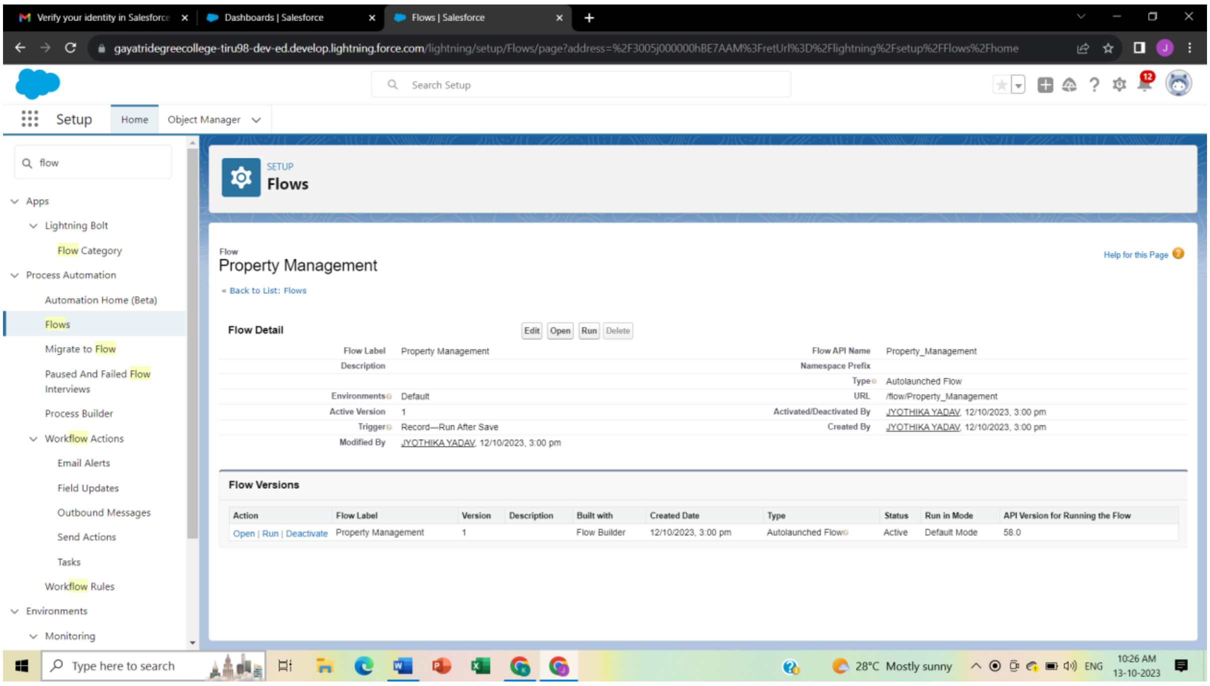
4. By following the same steps create the below given conditions

- the outcome is there is the condition for that label done the send the email---> condition Requirement All Conditions are met (AND) ----> Operator On less than 5
- On the outcome is there is the condition for that label Dont send email for this ----> condition Requirement All Conditions are met (AND) ----> Operator Greater than 0
- On the outcome is there is the condition for that label Dont Send the Email for this ----> condition Requirement All Conditions are met (AND) ----> Operator Greater than 1

4. And then Go to the layouts change the auto layout with the free for delete both the thread for each decision and create one new connection thread similarly do for all threads and come back to auto layout

➢ Create The Record To Test The Flow

1. Go to the App Launcher and select the property management application
2. Then Go to the Loan Object create one record with the following values
3. Go to your personal email you will get the mail for the selected date
4. Here you we can see the mail for the 24 hrs before the condition is like duedate – created for the remaining days so it will trigger the email according



❖ Milestone- 12: Apex Triggers

➢ Triggers

Use Case: Apex Trigger is related to Property Object in that there is the field “Create Property Type” which is having the picklist values in that field(Residential, Commercial, Industrial) the condition is like if we select the Create Property type as “Residential” than there is Commercial field so it should get populated with “Shop”