

# **INTRODUCTION**

## **1.1 OVERVIEW**

*A property manager's role is far more complex than simply showing space, signing leases, and collecting rents. Property management, as an area of specialization within the real estate industry, has emerged as a managerial science. So I 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 upto what extent 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.*

## **1.2 PURPOSE**

*A Property Management system (PMS) is software used in hospitality to control, organize, and executive operations and day-to-day activities of a hotel or vacation rental property.*

*Special purpose: Theaters, Schools and Universities, Places of worship extra. Single-family Residences, Multi-family*

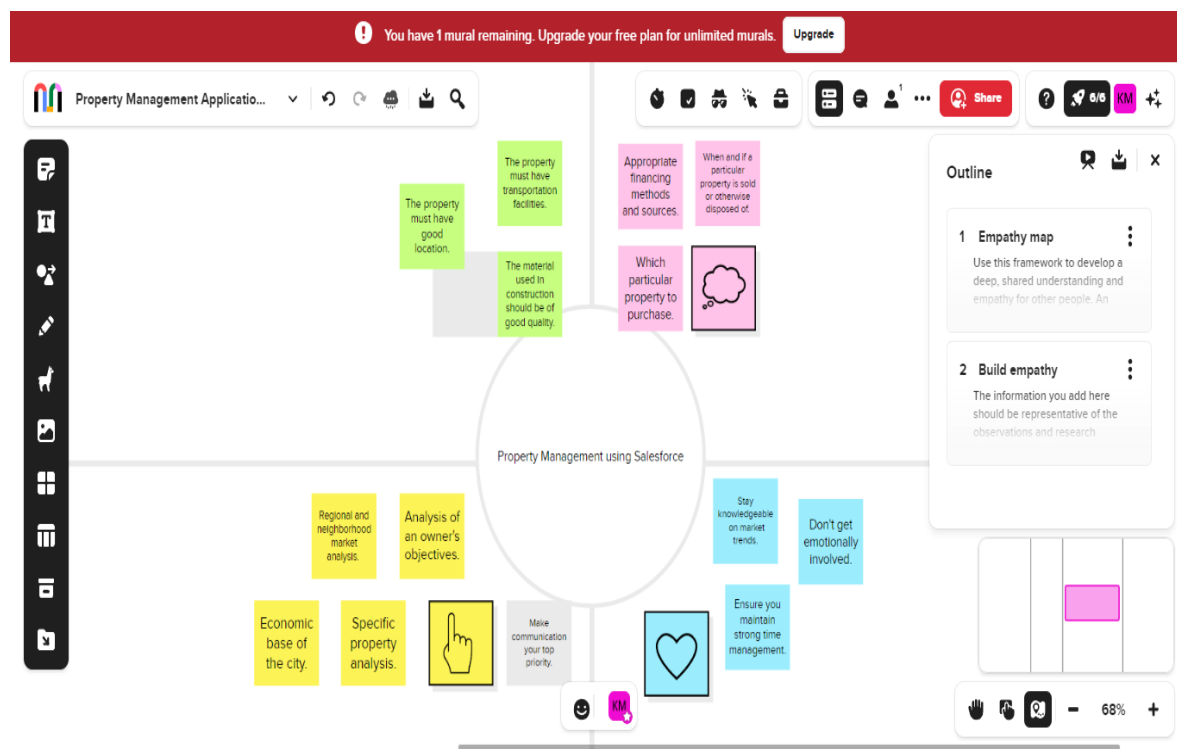
***Residence, Town houses, Apartments this is the Residential uses of Property Management.***

***Commercial: Public Accommodations, Retail Property, Office Property and Co-working Spaces.***

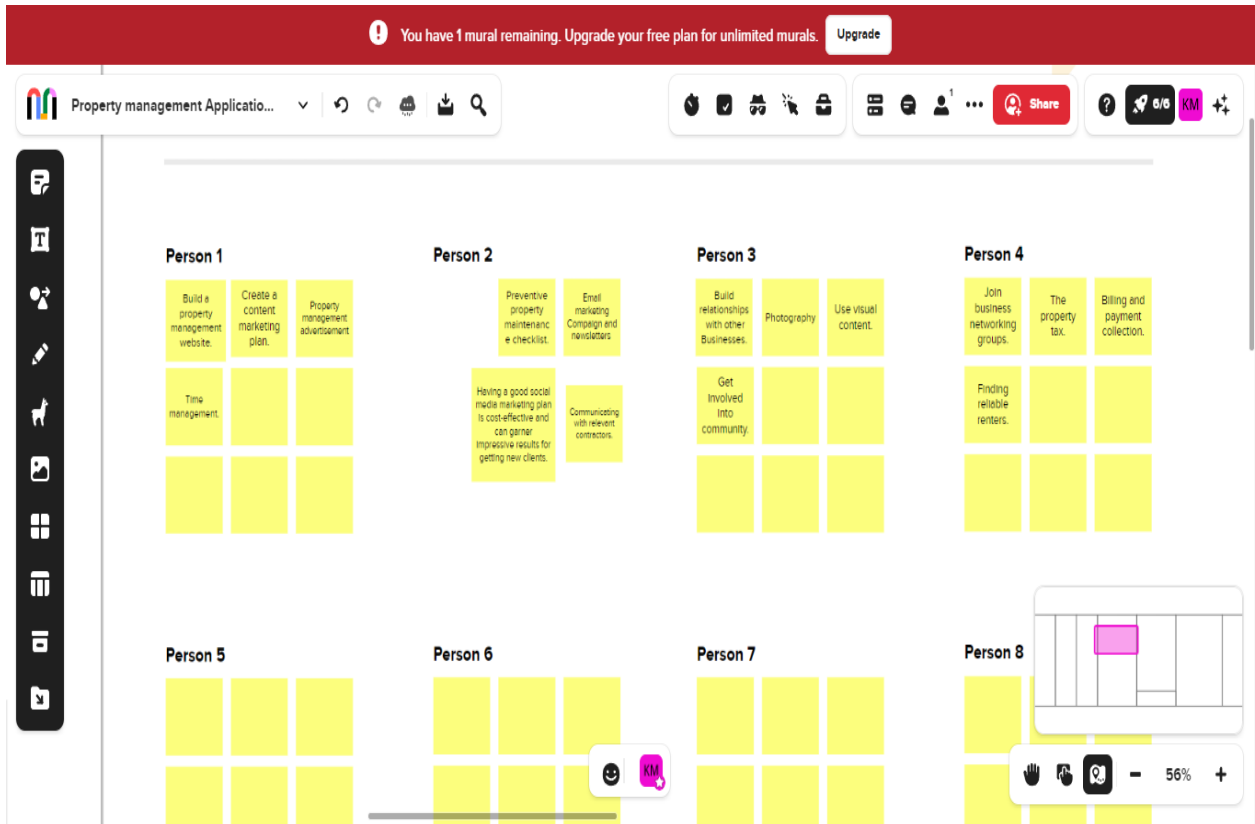
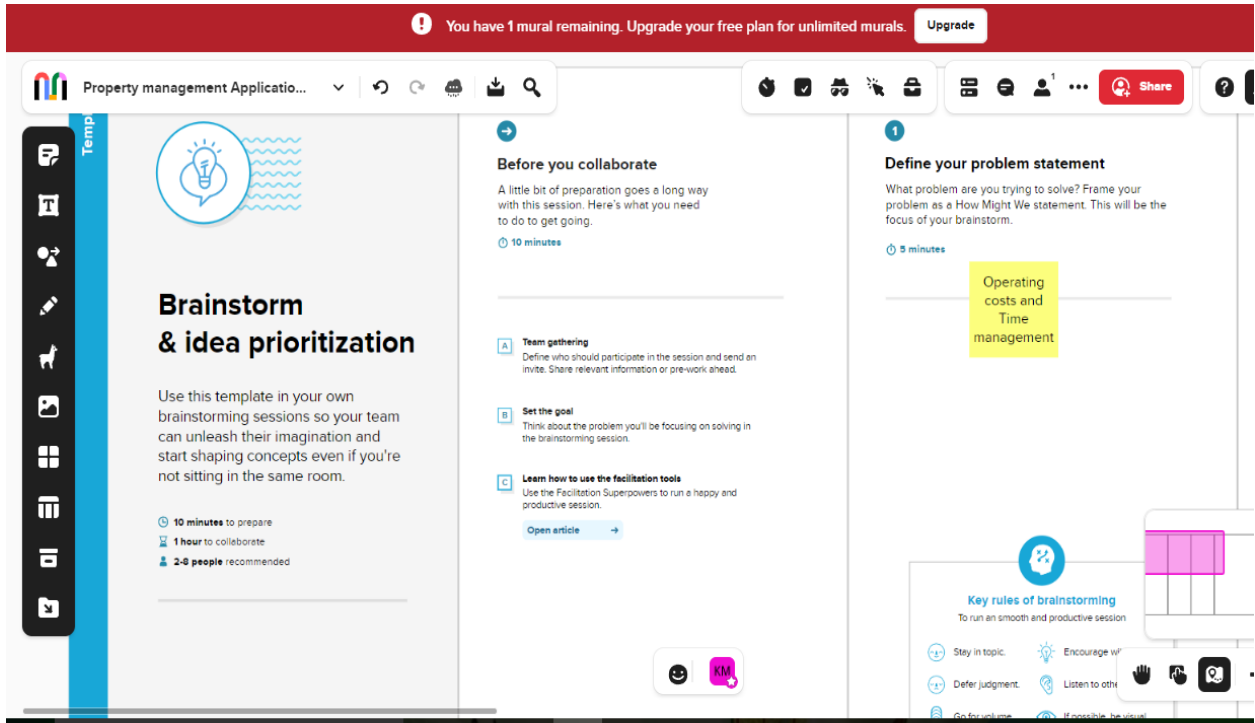
***Industrial: Warehouses, Light Manufacturing (Food Packaging), Heavy Manufacturing (Automatic, Factories, Steel mill).***

## **PROBLEM DEFINITION AND DESIGN THINKING**

### **2.1 EMPATHY MAP**



## 2.2 IDEATION AND BRAIN STORMING MAP





## **RESULT**

### **3.1 DATA MODEL**

Object name	Fields in the object	
Rent	Field label	Data type
	Rent	Auto Number
	BHK type	Picklist
Loan	Field label	Data type
	Interest Rate	Currency
	Loan Amount	Formula

## 3.2 ACTIVITY AND SCREENSHOT

### Milestone 1-Salesforce

#### Activity 1:

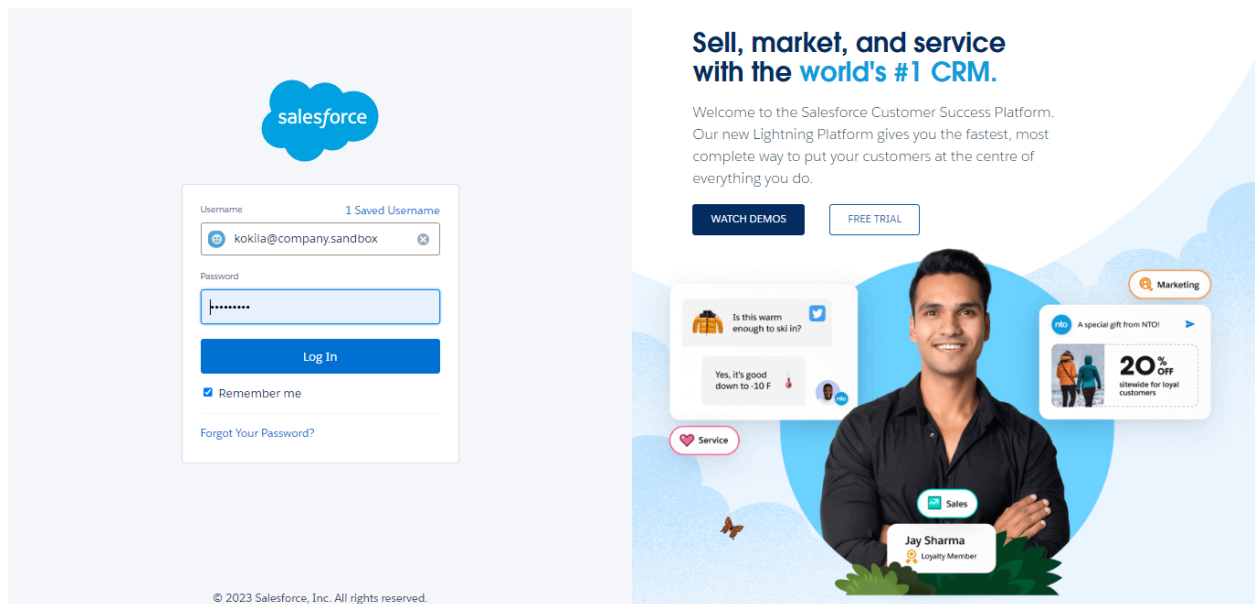
#### Creating Developer Account

1. Go to [developers.salesforce.com](https://developers.salesforce.com).
2. Click on sign up.
3. On the sign up form, enter the details.
4. Next Click on sign up after filling the details.

#### Activity 2:

#### Account Activation

1. Go to the inbox of the email that you used while signing up the page. Click on the verify account to activate your account.



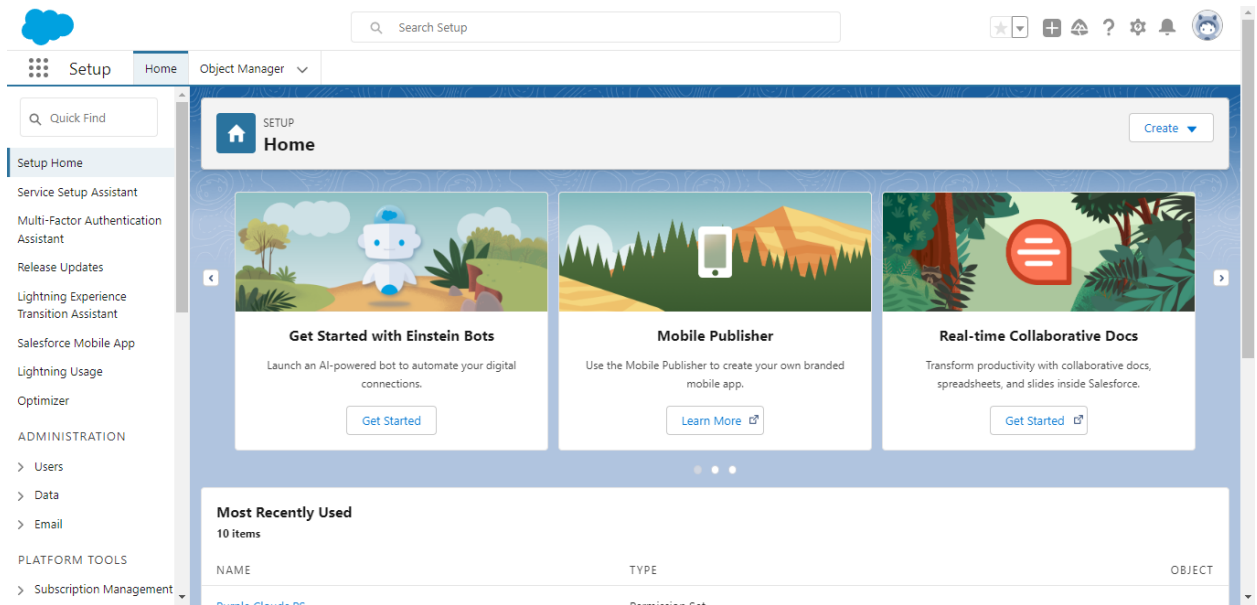
## **2. Login to Your Salesforce Account.**

### **Milestone 2-Object**

#### **Activity 1:**

#### **Objects- To Navigate to setup page:**

##### **1. Click on gear icon ☐ Click setup.**



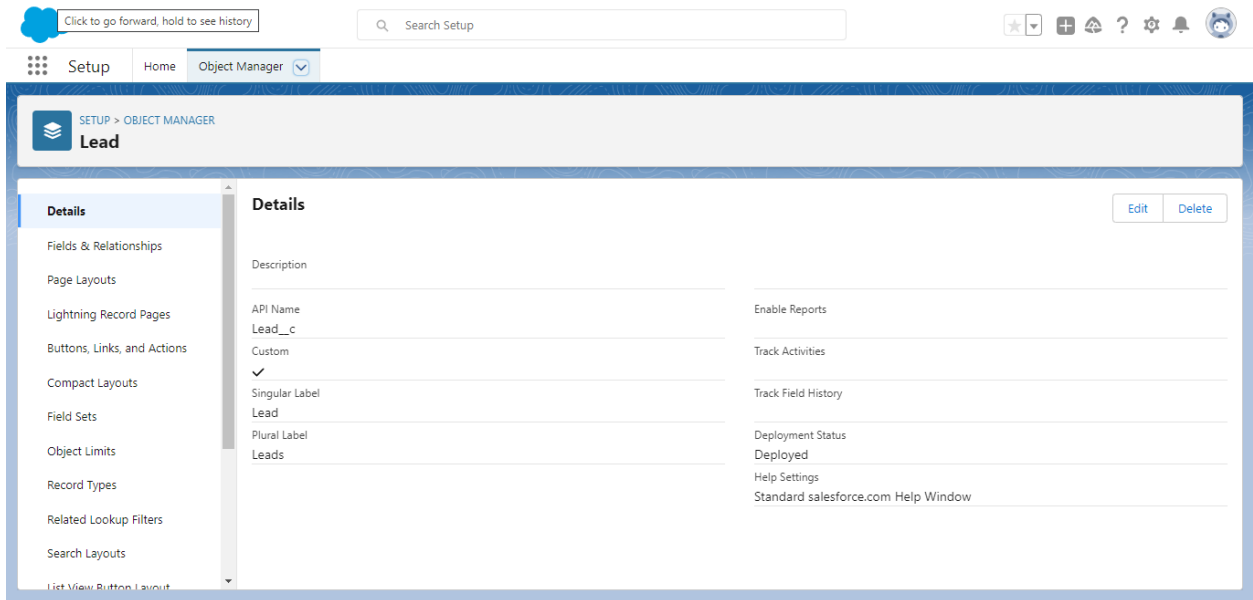
#### **To create an object:**

##### **1. From the setup page ☐ Click on Object Manager ☐ Click on Create ☐ Click on Custom Object.**

#### **On custom object defining page:**

##### **2. Enter the label name, plural name, click on Allow reports, Allow search -> Next Click on Save.**

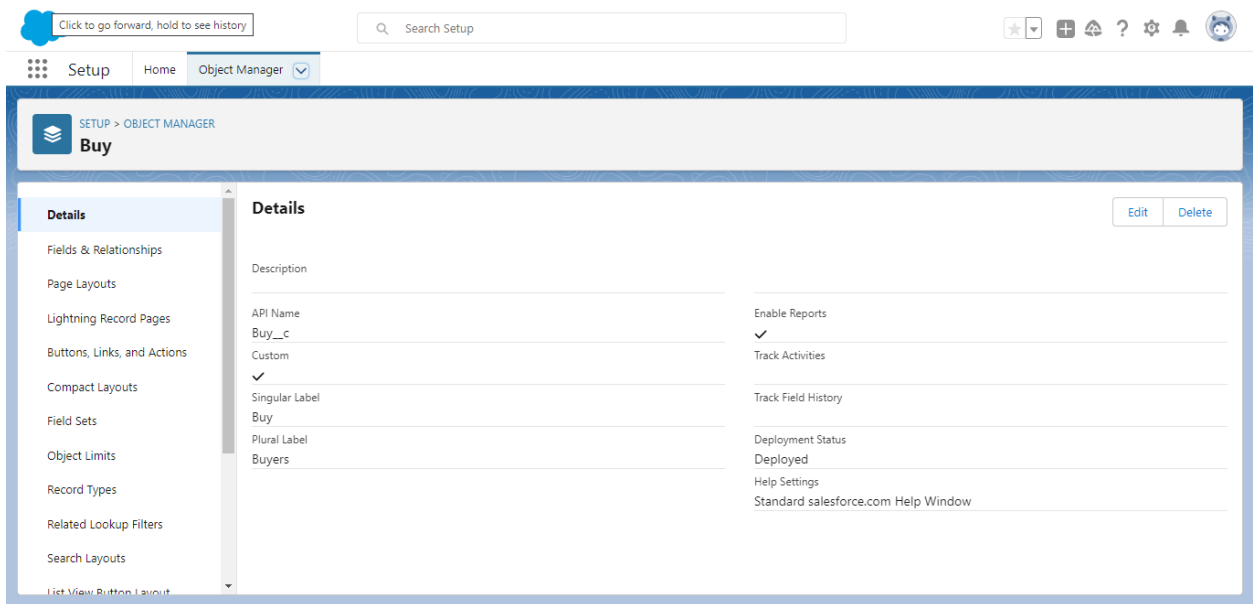
#### **Create Object Lead**



## Activity 2:

### Create Object Buy

*Follow the similar steps to create the object Buy.*

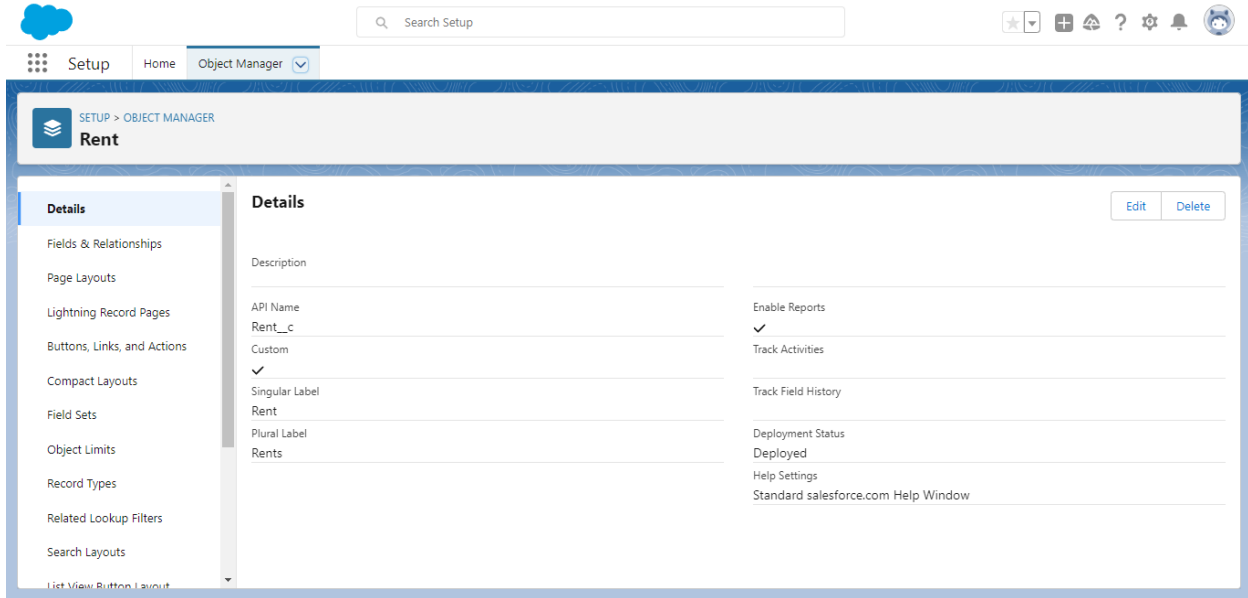


## Activity 3:



## Create Object Rent

***Follow the similar procedure to create the object Rent.***



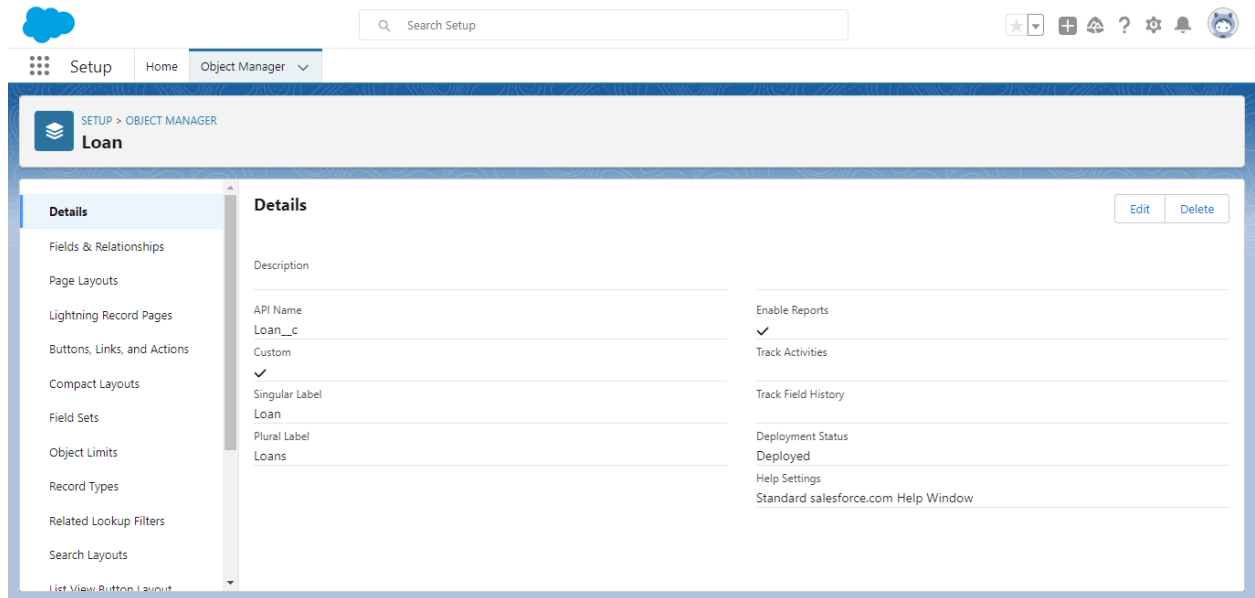
The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). A search bar labeled 'Search Setup' is on the right. Below the navigation bar, the breadcrumb 'SETUP > OBJECT MANAGER' is visible, followed by the object name 'Rent'. On the left, a sidebar lists various configuration options: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View, Button Layout. The main content area is titled 'Details' and contains a table of configuration options for the 'Rent' object. The table has two columns: the first column lists the configuration item, and the second column shows its current value or status. The items include Description, API Name (Rent\_\_c), Custom (checked), Singular Label (Rent), Plural Label (Rents), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. 'Edit' and 'Delete' buttons are located in the top right corner of the details section.

Configuration Item	Value/Status
Description	
API Name	Rent__c
Custom	✓
Singular Label	Rent
Plural Label	Rents
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## Activity 4:

### Create Object Loan

***Follow the similar procedure to create the object Loan.***



## **Milestone 3-Tab**

### **Activity 1:**

### **Create the Lightning Tab**

#### **To Create a Tab: (Lead)**

- 1. Go to setup page -> type Tabs in Quick Find bar -> click on tabs -> New (under custom object tab).**
- 2. Select Object (Lead) -> Select the tab style -> Next (Add to profile page) keep it as default -> Next (Add to Custom App)keep it as default -> click on Save.**

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tab' and a list of options under 'User Interface': 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs' (which is selected). The main content area is titled 'SETUP Tabs' and 'Edit Custom Object Tab Leads'. It includes a 'Help for this Page' link. Below the title, it says 'Fill in the fields below to define the custom tab.' The 'Custom Tab Definition Edit' section contains 'Custom Object Tab Information' with fields for 'Tab Label' (Leads), 'Object' (Lead), and 'Tab Style' (Books). There is a note: '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to '--None--'. A 'Description' text area is also present. At the bottom are 'Save' and 'Cancel' buttons.

## Activity 2:

### To create a Tab: (Buy)

*Same procedure to create a tab Buy.*

The screenshot shows the Salesforce Setup interface for creating a tab for the 'Buyers' object. The left sidebar is identical to the previous screenshot, with 'Tabs' selected. The main content area is titled 'SETUP Tabs' and 'Edit Custom Object Tab Buyers'. It includes a 'Help for this Page' link. Below the title, it says 'Fill in the fields below to define the custom tab.' The 'Custom Tab Definition Edit' section contains 'Custom Object Tab Information' with fields for 'Tab Label' (Buyers), 'Object' (Buy), and 'Tab Style' (Laptop). There is a note: '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to '--None--'. A 'Description' text area is also present. At the bottom are 'Save' and 'Cancel' buttons.

## Activity 3:

## To create a Tab: (Rent)

The screenshot shows the 'Setup Tabs' interface in a web application. The left sidebar contains a search bar with 'tab' entered, and a list of options under 'User Interface': 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs' (which is highlighted). Below this is a message: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Edit Custom Object Tab Rents' and includes a 'Help for this Page' link. It instructs the user to 'Fill in the fields below to define the custom tab.' The 'Custom Tab Definition Edit' section contains a 'Custom Object Tab Information' table with the following data: Tab Label 'Rents', Object 'Rent', and Tab Style 'Alarm clock'. Below the table, there is an optional section for 'Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to '--None--'. A 'Description' text area is also present. At the bottom are 'Save' and 'Cancel' buttons.

***Follow the similar steps to create the tab Rent. Then Save it.***

## Activity 4:

## To create a Tab: (Loan)

The screenshot shows the 'Setup Tabs' interface in a web application, similar to the previous one but for a 'Loan' tab. The left sidebar is identical, with 'Tabs' highlighted. The main content area is titled 'Edit Custom Object Tab Loans' and includes a 'Help for this Page' link. It instructs the user to 'Fill in the fields below to define the custom tab.' The 'Custom Tab Definition Edit' section contains a 'Custom Object Tab Information' table with the following data: Tab Label 'Loans', Object 'Loan', and Tab Style 'Desk'. Below the table, there is an optional section for 'Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to '--None--'. A 'Description' text area is also present. At the bottom are 'Save' and 'Cancel' buttons.

## **Milestone 4-The Lightning App**

### **Activity 1:**

#### **Create the Lightning App**

- 1. Go to setup page -> In quick find search “app manager” -> Select app manager -> click on new lightning app.**
- 2. Type the app name as Property Management in app details and branding -> Next -> (App option page) keep it as default -> Next.**
- 3. (Utility Items) keep it as default -> Next -> Add Navigation Items (Lead, Buy, Rent, Loan) -> Next -> Add User Profiles (Add System Administrator, Salesforce platform user, Standard User) -> Next.**

The screenshot shows the 'App Details & Branding' configuration page in the Lightning App Builder. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Property Management'. A left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' with the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It is divided into two columns: 'App Details' and 'App Branding'. Under 'App Details', there are fields for 'App Name' (containing 'Property Management'), 'Developer Name' (containing 'Property\_Management'), and 'Description' (with a placeholder 'Enter a description...'). Under 'App Branding', there is an 'Image' upload area with an 'Upload' button, a 'Primary Color Hex Value' dropdown set to '#0070C0', and 'Org Theme Options' with a checkbox 'Use the app's image and color instead of the org's custom theme' which is unchecked. At the bottom, an 'App Launcher Preview' shows a blue square with 'PM' and a grey rectangle with 'Property Management'.

#### **4. To Add Navigation Items:**

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

The screenshot shows the 'Navigation Items' configuration screen in the Lightning App Builder. The left sidebar has 'App Settings' expanded, with 'Navigation Items' selected. The main content area is titled 'Navigation Items' and includes a description: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.'

The interface is divided into two main sections: 'Available Items' and 'Selected Items'. The 'Available Items' section has a search bar with the placeholder text 'Type to filter list...'. Below the search bar is a list of items, including 'Accounts', 'Alert Settings', 'All Sites', 'Alternative Payment Methods', 'App Launcher', 'Appointment Invitations', 'Approval Requests', 'Asset Action Sources', 'Asset Actions', and 'Asset State Periods'. The 'Selected Items' section shows a list of items that have been moved: 'Leads', 'Buyers', 'Rents', and 'Loans'. Arrows between the two sections allow for moving items back and forth.

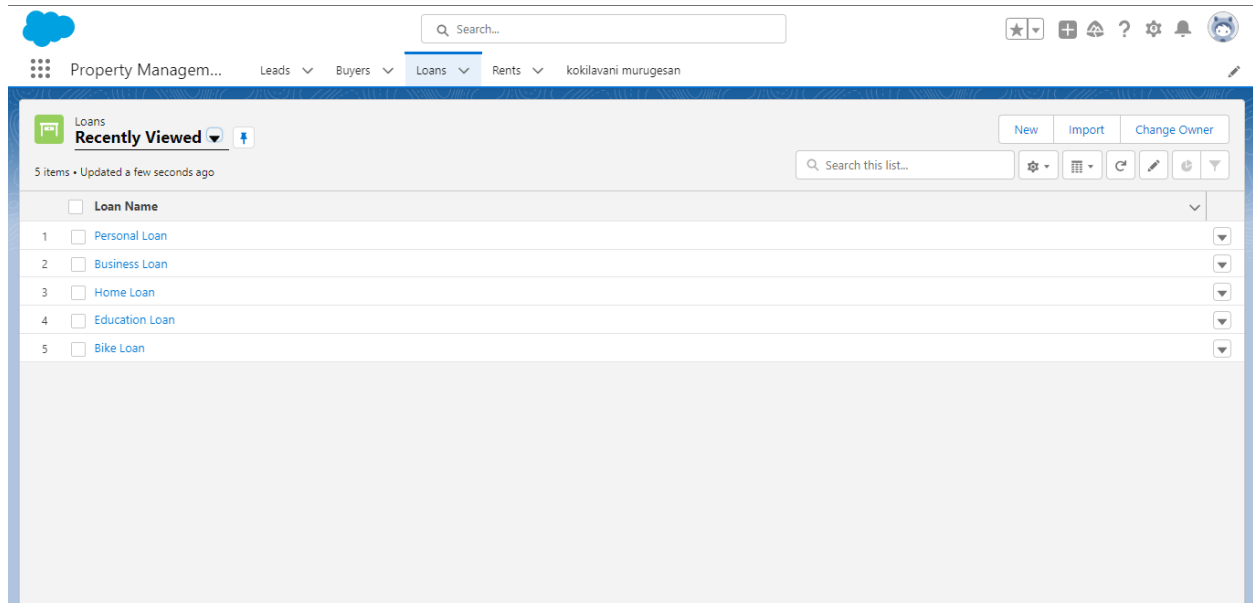
**5. To Add User Profiles:**

**6. Search profiles in search bar -> click on the arrow button -> Save & finish.**

The screenshot shows the 'User Profiles' configuration screen in the Lightning App Builder. The left sidebar has 'App Settings' expanded, with 'User Profiles' selected. The main content area is titled 'User Profiles' and includes a description: 'Choose the user profiles that can access this app.'

The interface is divided into two main sections: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' section has a search bar with the placeholder text 'Type to filter list...'. Below the search bar is a list of profiles, including 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Contract Manager', 'Custom: Marketing Profile', 'Custom: Sales Profile', 'Custom: Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', and 'Customer Community User'. The 'Selected Profiles' section shows a list of profiles that have been moved: 'System Administrator', 'Standard User', and 'Standard Platform User'. Arrows between the two sections allow for moving profiles back and forth.

***Then go to the app launcher search the app Property Management as shown below.***



## **Milestone 5-Fields**

### **Activity 1:**

#### **❖ Create the Lead Field**

- 1. Go to setup page -> Click on object manager -> Select the object lead.***
- 2. Now click on Fields & Relationships -> Click New.***
- 3. Choose the field data type as Auto Number -> Next -> Fill the field label name Lead, format L-{0000} -> Next.***
- 4. Keep it as default click Next ☐ And then Save.***

Lead Custom Field  
Lead

Back to Lead

Custom Field Definition Detail

Field Information

Field Label	Lead	Object Name	Lead
Field Name	Lead	Data Type	Auto Number
API Name	Lead__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	kokilavani murugesan, 25/03/2023, 6:54 pm		Modified By
			kokilavani murugesan, 12/04/2023, 12:18 pm

General Options

External ID ☐

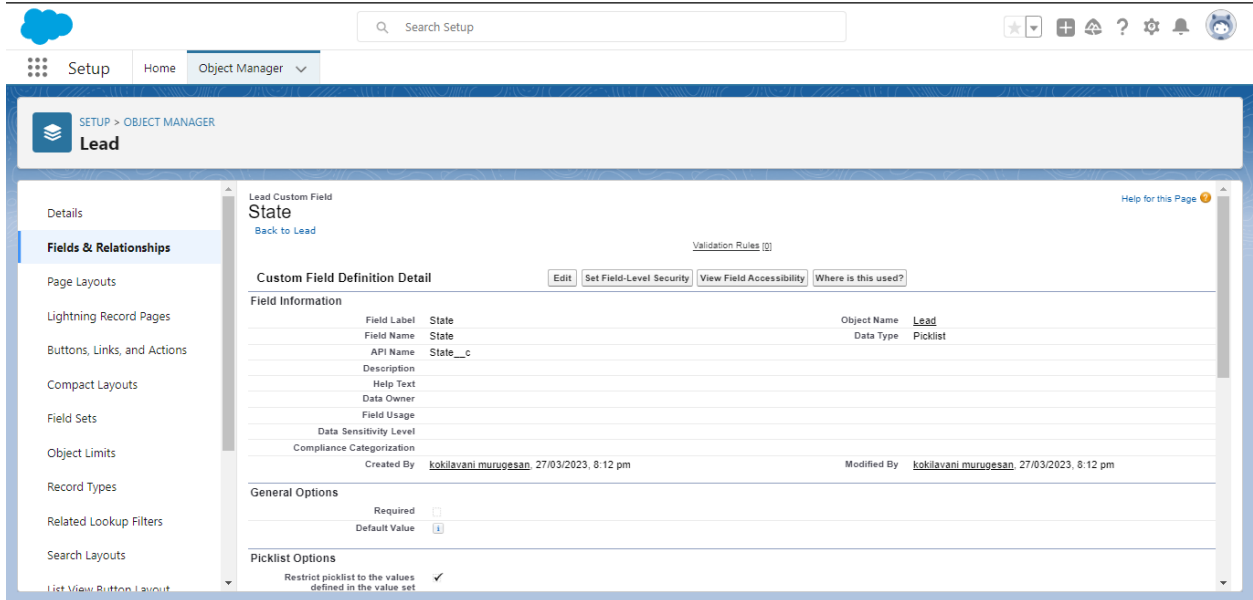
Auto Number Options

Display Format L-0000

❖ **Create the state field:**

- 1. Above (1), (2) procedures are Repeat -> Give the Data type as Picklist (Maharashtra, Telangana, Gujarat, Tamil Nadu) (Field Dependency).**
- 2. Then Next -> No changes Click Next ☐ Save.**





Setup > Object Manager > Lead

Lead Custom Field: State

Back to Lead

Validation Rules (0)

Custom Field Definition Detail

Field Information

Field Label	State	Object Name	Lead
Field Name	State	Data Type	Picklist
API Name	State__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	kokilavani murugesan, 27/03/2023, 8:12 pm		Modified By
Modified By: kokilavani murugesan, 27/03/2023, 8:12 pm			

General Options

Required: ☐

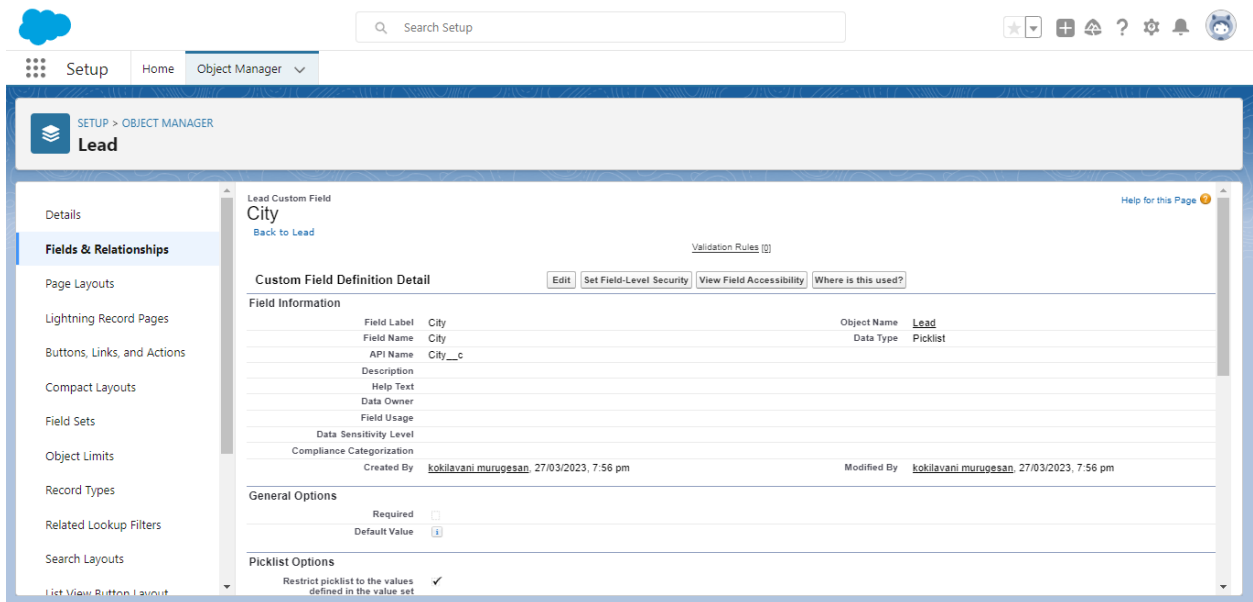
Default Value:

Picklist Options

Restrict picklist to the values defined in the value set: ☒

## ❖ To Create the City Field:

1. Give the Data type as Picklist (Mumbai, Pune, Nashik, Hyderabad, Surat, Ahemdabad) (Field Dependency).
2. Save.



Setup > Object Manager > Lead

Lead Custom Field: City

Back to Lead

Validation Rules (0)

Custom Field Definition Detail

Field Information

Field Label	City	Object Name	Lead
Field Name	City	Data Type	Picklist
API Name	City__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	kokilavani murugesan, 27/03/2023, 7:56 pm		Modified By
Modified By: kokilavani murugesan, 27/03/2023, 7:56 pm			

General Options

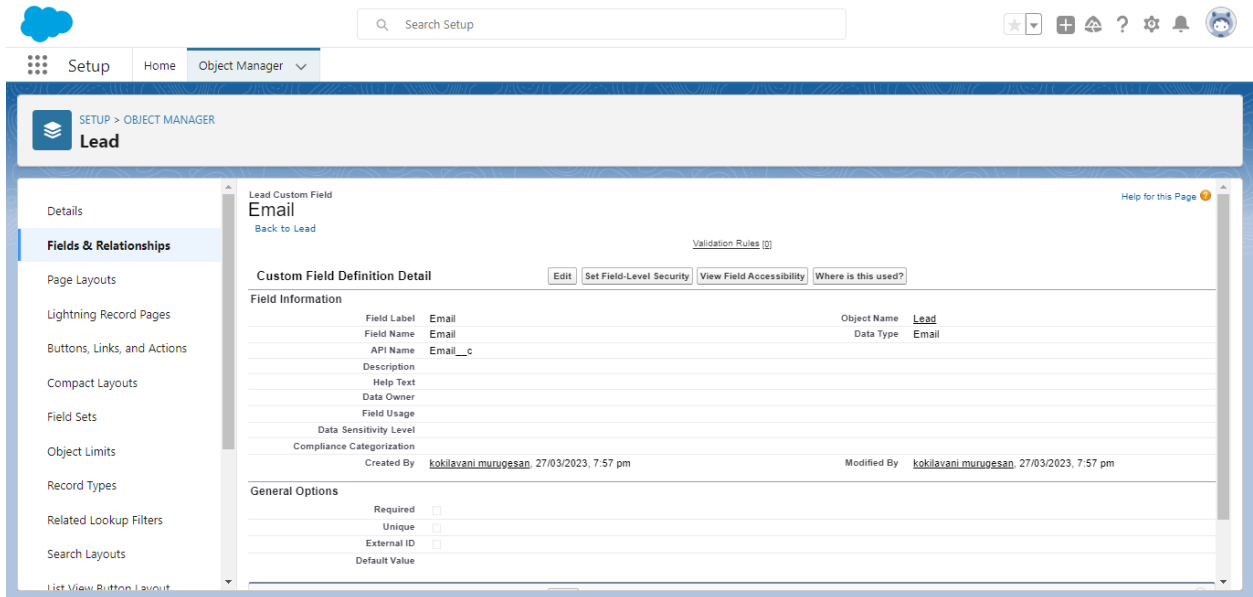
Required: ☐

Default Value:

Picklist Options

Restrict picklist to the values defined in the value set: ☒

❖ **Email: Create the Email Select the data Type as Email, then save it.**

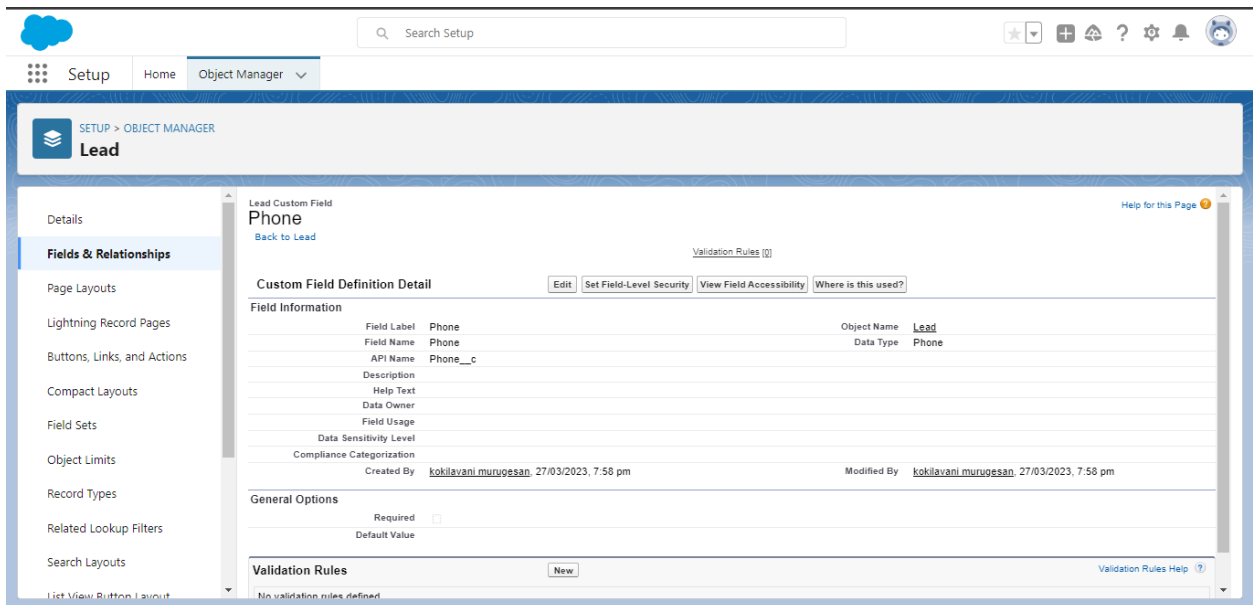


The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View, Button Layout. The main content area is titled 'Lead Custom Field Email' and includes a 'Back to Lead' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization
Email	Email	Email__c						

The 'Object Name' is 'Lead' and the 'Data Type' is 'Email'. The 'Created By' is 'kokilavani murugesan' on '27/03/2023, 7:57 pm' and the 'Modified By' is 'kokilavani murugesan' on '27/03/2023, 7:57 pm'. The 'General Options' section includes checkboxes for 'Required', 'Unique', 'External ID', and 'Default Value', all of which are currently unchecked.

❖ **Phone: Select the Data type as Phone and then save it.**



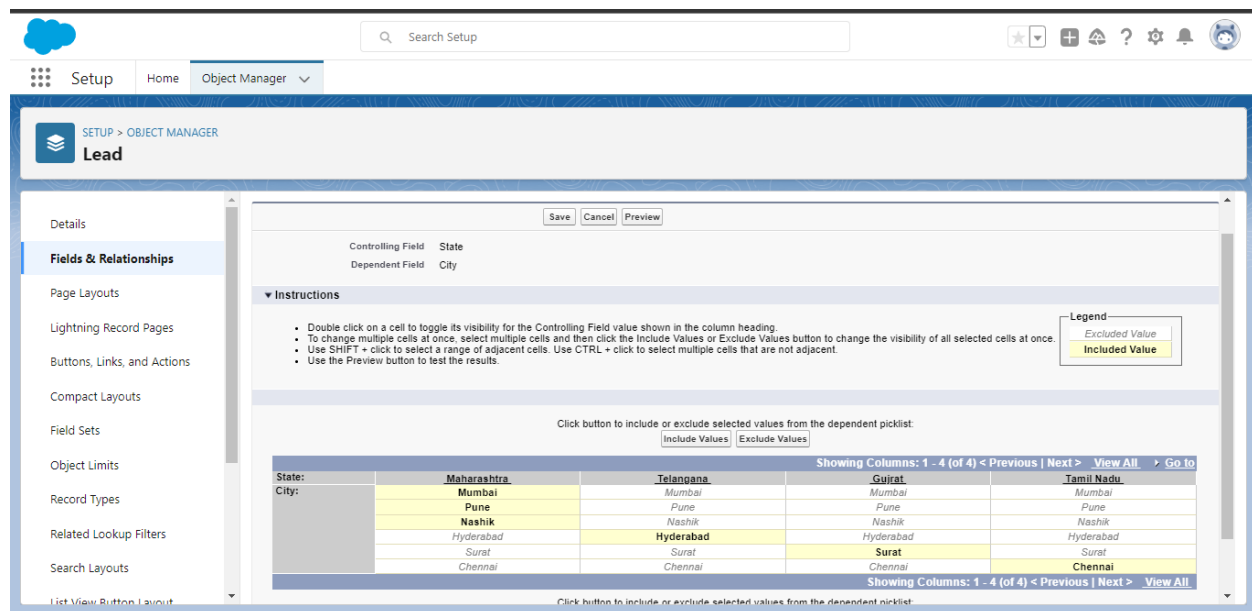
The screenshot shows the Salesforce Setup interface for a 'Lead Custom Field Phone'. The left sidebar is the same as the previous screenshot. The main content area is titled 'Lead Custom Field Phone' and includes a 'Back to Lead' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization
Phone	Phone	Phone__c						

The 'Object Name' is 'Lead' and the 'Data Type' is 'Phone'. The 'Created By' is 'kokilavani murugesan' on '27/03/2023, 7:58 pm' and the 'Modified By' is 'kokilavani murugesan' on '27/03/2023, 7:58 pm'. The 'General Options' section includes checkboxes for 'Required' and 'Default Value', both of which are currently unchecked. At the bottom, there is a 'Validation Rules' section with a 'New' button and the text 'No validation rules defined'.

❖ **In the Field and Relationship go to the Field Dependencies**

**1. Go to new Field Dependency -> Give the value of controlling Field is State -> And Dependent Field is City -> Next you can include the Values.**



## Activity 2: For Object Buy

- ❖ Create Field for buy
- ❖ Create Property Type

**1. Go to the Object Manager -> Click the Object Buy -> Go to the Field & Relationship -> Click New -> Give the Field Data type as Picklist (Residential, commercial, Industrial) -> 2time give next -> Save.**

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Buy' button is visible. The main content area is titled 'Property Type' and includes a 'Back to Buy' link. The 'Custom Field Definition Detail' section is active, showing various tabs like 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays details for the 'Property Type' field, including its label, name, API name, and data type. The 'General Options' section shows the 'Required' checkbox is unchecked and the 'Default Value' is set to '1'. The 'Picklist Options' section shows the 'Restrict picklist to the values defined in the value set' checkbox is checked.

Buy Custom Field  
Property Type  
[Back to Buy](#)

Validation Rules (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Property Type	Object Name	Buy
Field Name	Property_Type	Data Type	Picklist
API Name	Property_Type__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	kokilavani.murugesan, 27/03/2023, 8:31 pm		Modified By
			kokilavani.murugesan, 27/03/2023, 8:31 pm

General Options

Required ☐

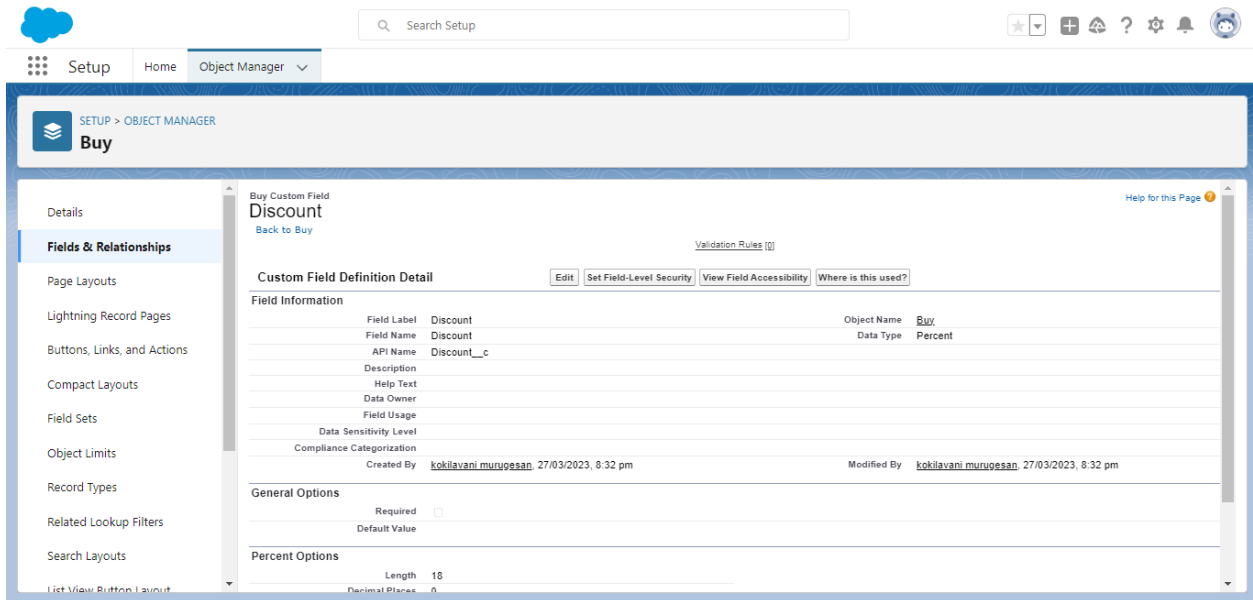
Default Value [1](#)

Picklist Options

Restrict picklist to the values defined in the value set ☒

## ❖ Discount

***Repeat the same procedure, give percentage as the Data type -> Field label Name is Discount -> Next -> Save.***



Setup > Object Manager > Buy

Buy Custom Field  
Discount

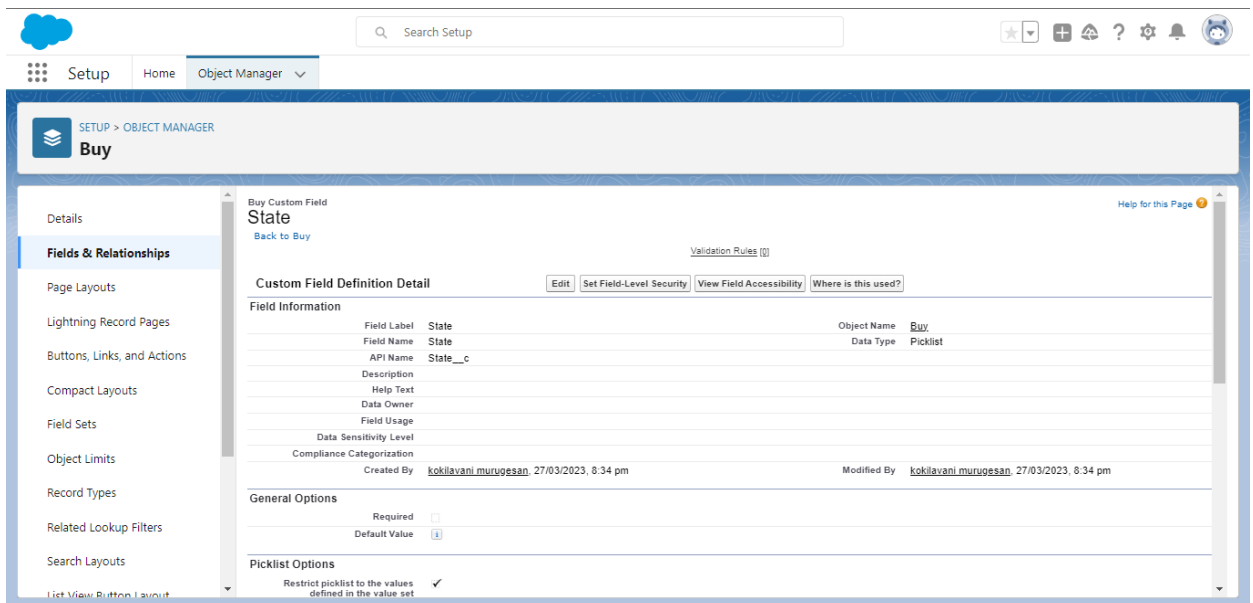
Fields & Relationships

Custom Field Definition Detail

Field Information		Object Name	Data Type
Field Label	Discount	Buy	Percent
Field Name	Discount		
API Name	Discount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	kokilavani murugesan, 27/03/2023, 8:32 pm		Modified By
General Options			
Required	<input type="checkbox"/>		
Default Value			
Percent Options			
Length	18		
Decimal Places	0		

## ❖ State

**Give the Data type as Picklist, label Name is State then add the values (Maharashtra, Telangana, Gujarat, Tamil Nadu) Field Dependency -> Next -> Save.**



Setup > Object Manager > Buy

Buy Custom Field  
State

Fields & Relationships

Custom Field Definition Detail

Field Information		Object Name	Data Type
Field Label	State	Buy	Picklist
Field Name	State		
API Name	State__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	kokilavani murugesan, 27/03/2023, 8:34 pm		Modified By
General Options			
Required	<input type="checkbox"/>		
Default Value	(s)		
Picklist Options			
Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>		

## ❖ City: Activity (1) as same as the procedure

**Buy Custom Field**  
City  
[Back to Buy](#)

Validation Rules (0)

**Custom Field Definition Detail** [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information	
Field Label	City
Field Name	City
API Name	City__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	kokilavani murugesan, 27/03/2023, 8:36 pm
Modified By	kokilavani murugesan, 27/03/2023, 8:36 pm

**General Options**

Required ☐

Default Value

**Picklist Options**

Restrict picklist to the values defined in the value set ☒

## ❖ Annual Amount to Be Paid:

**Buy Custom Field**  
Amount to be paid  
[Back to Buy](#)

Validation Rules (0)

**Custom Field Definition Detail** [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information	
Field Label	Amount to be paid
Field Name	Amount_to_be_paid
API Name	Amount_to_be_paid__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	kokilavani murugesan, 03/04/2023, 11:39 am
Modified By	kokilavani murugesan, 09/04/2023, 4:25 pm

**General Options**

Required ☐

Default Value

**Currency Options**

Length 16

Decimal Places 2

## Activity 3:

### Create Field for Rent

#### ❖ Rent

**1. Go to the Object rent -> click Field & Dependency -> New -> Data type is Auto Number, label name is Rent and field format is R- {0000} -> Next -> Save.**

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View, Button Layout. The main content area is titled 'Rent Custom Field' and 'Rent'. It includes a 'Back to Rent' link and a 'Help for this Page' link. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details: Field Label (Rent), Field Name (Rent), API Name (Rent\_c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'External ID' as an unchecked checkbox. The 'Auto Number Options' section shows 'Display Format' as 'R-{0000}'. The 'Created By' and 'Modified By' fields both show 'kokilavani murugesan' with timestamps from 27/03/2023.

## ❖ Rental City

**1. Select the Text as the Field Data Name (Any City).**

The screenshot shows the Salesforce Setup interface for the 'Rental City' custom field. The left sidebar is the same as the previous screenshot. The main content area is titled 'Rental City Custom Field' and 'Rental City'. It includes a 'Back to Rent' link and a 'Help for this Page' link. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details: Field Label (Rental City), Field Name (Rental\_City), API Name (Rental\_City\_\_c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'Required' as checked, 'Unique' as unchecked, 'Case Sensitive' as unchecked, 'External ID' as unchecked, and 'Default Value' as empty. The 'Created By' and 'Modified By' fields both show 'kokilavani murugesan' with timestamps from 09/04/2023.

### ❖ **BHK Type:**

- 1. Choose the Data Type as Picklist (1BHK, 2BHK, 3BHK). Given the label name as BHK type -> Next -> Save it.**

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'Rent Custom Field BHK type' and shows the 'Custom Field Definition Detail' for a field named 'BHK\_type'. The field is configured as a Picklist with the object 'Rent'. The 'Field Information' section shows the field label 'BHK type', field name 'BHK\_type', API name 'BHK\_type\_\_c', and data type 'Picklist'. The 'General Options' section shows 'Required' as a checkbox and 'Default Value' as a dropdown. The 'Picklist Options' section shows 'Restrict picklist to the values defined in the value set' as a checkbox.

### **Activity 4:**

#### **Create Field for Loan**

- 1. Select the Object Loan -> Click Field & Relationship -> New -> choose the Data Type as suitable Field Label Name -> Next -> Save.**

- ❖ **Loan Id: Data Type is Auto Number LN- {0000}.**
- ❖ **Interest Rate: Select the Data type as Currency.**
- ❖ **Term: Select the Data Type as Number.**
- ❖ **Annual Loan: Field create the Number as the data type.**
- ❖ **Total Loan Instalments: Number as the data type.**



- ❖ **Loan Repayment: Number as the data type.**
- ❖ **Loan Amount: Select the Field Data Type as Formula.**  
**In Formula option select advanced formula and type the following formula.**

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View, Button Layout. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Loan'. It displays the 'Formula Options' for the 'Loan Amount' field. The 'Formula Return Type' is set to 'Currency' and 'Decimal Places' is set to '2'. The 'Advanced Formula' tab is selected, showing the formula: 
$$\text{Loan Amount (Currency)} = \frac{\text{Loan\_Repayment\_c} * ((1 + (\text{Interest\_Rate\_c} / 52))^{\text{Term\_c}} - 1)}{((\text{Interest\_Rate\_c} / 52) * ((1 + (\text{Interest\_Rate\_c} / 52))^{\text{Term\_c}}))}$$

**$$(\text{Loan\_Repayment\_c} * ((1 + (\text{Interest\_rate\_c} / 52))^{\text{Term\_c}} - 1)) / ((\text{Interest\_rate\_c} / 52) * ((1 + (\text{Interest\_rate\_c} / 52))^{\text{Term\_c}}))$$**

**Type this formula and check syntax, if there is no error and save it.**

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER  
**Loan**

Details

**Fields & Relationships**  
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(15, 2)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Currency(15, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan Id	Loan_Id__c	Auto Number		
Loan Name	Name	Text(80)		✓
Loan Repayment	Loan_Repayment__c	Number(18, 0)		

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER  
**Loan**

Details

**Fields & Relationships**  
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Interest Rate	Interest_Rate__c	Currency(15, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan Id	Loan_Id__c	Auto Number		
Loan Name	Name	Text(80)		✓
Loan Repayment	Loan_Repayment__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Term	Term__c	Number(15, 0)		
Total Loan Instalments	Total_Loan_Instalments__c	Number(18, 0)		

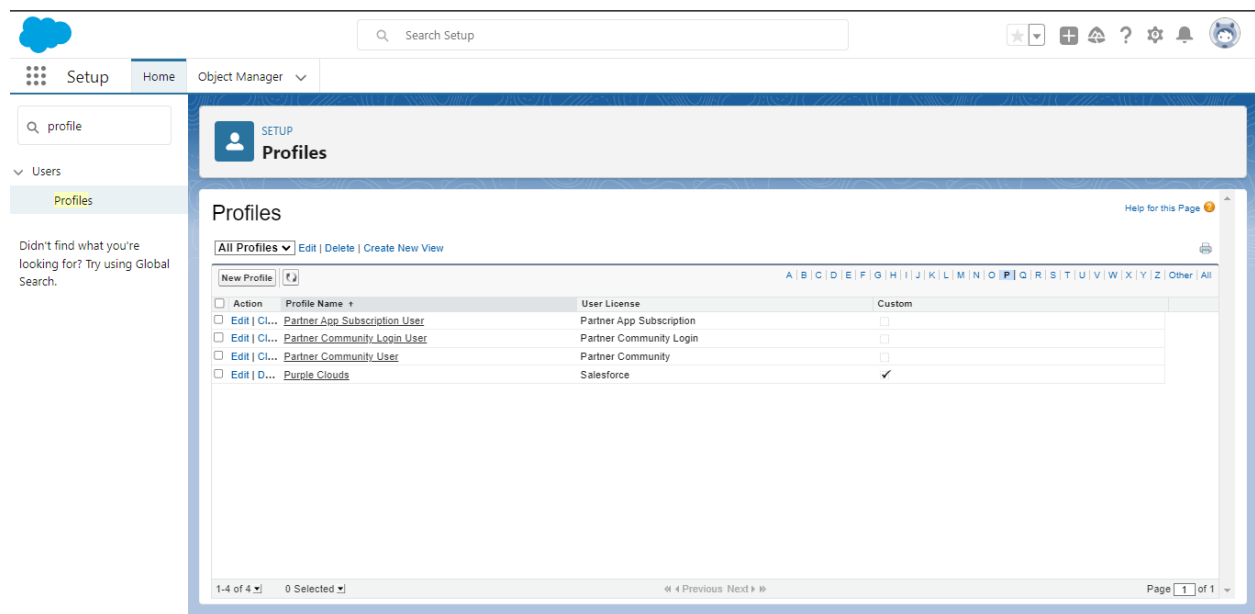
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout

## **Milestone 6-Profile**

### **Activity 1:**

### **Create a New Profile:**

1. Go to Setup -> Search Profiles in Quick find -> Clone the profile (Standard User) -> Enter the Profile Name (Purple Clouds) You can give any profile Name (Label Name) -> save.



2. Click on the New Created profile (Purple Clouds) -> Next Profile Page will be Open -> Click on Edit.
3. Give the Custom Object permission which you want to give and give the view all access permission and assign to the profile -> Save it.
4. Again Go to the profiles -> You can see the A, B, C, D.....like Now click S -> Click on Standard user profile -> Click Clone -> Give the Name as Sales Manager -> Save.
5. Again A, B, C, D.... Click S -> Click On Standard Platform User -> Click Clone -> Give the Name as Marketing

***Executive 1 and Save it, Again Give Marketing Executive 2 And Save, again give the name as Marketing Manager.***

**Profile Edit**

Name:

User License:  Custom Profile: ☒

Description:

**Custom App Settings**

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Data Manager	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>

## ***Activity 2:***

### ***Create Marketing***

- 1. Go to the Profile Marketing Executive -> Click Edit -> Give the Create access to all the Custom Objects permission.***
- 2. Go to the profile Marketing Executive -> Click Edit -> Give Read, Create, Edit, Delete for all the custom Objects.***
- 3. Save the Profile.***

Search Setup

Setup Home Object Manager

profile

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
Edit   D...	Marketing_Executive	Salesforce Platform	✓
Edit   D...	Marketing_Executive1	Salesforce Platform	✓
Edit   D...	Marketing_Executive2	Salesforce	✓
Edit   D...	Marketing_Manager	Salesforce Platform	✓
Edit   Cl...	Marketing_User	Salesforce	
Edit   Cl...	Minimum Access - Salesforce	Salesforce	

1-6 of 6 0 Selected

Page 1 of 1

### Activity 3- Sales:

1. Clone the Profile Standard User -> Give the Label Name Sales Manager -> Save -> Again -> Give the Name as Sales Rep 1 -> Sales Rep 2 -> Sales Rep 3 -> Save it.
2. Now you have created the 4 Profiles.

Search Setup

Setup Home Object Manager

profile

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
Edit   D...	Sales_Executive	Salesforce Platform	✓
Edit   D...	Sales_Manager	Salesforce	✓
Edit   D...	Sales_Rep1	Salesforce Platform	✓
Edit   D...	Sales_Rep2	Salesforce Platform	✓
Edit   D...	Sales_Rep3	Salesforce Platform	✓
Edit   Cl...	Salesforce API Only System Integrations	Salesforce Integration	
Edit   Cl...	Silver Partner User	Silver Partner	
Edit   Cl...	Solution Manager	Salesforce	
Edit   Cl...	Standard Platform User	Salesforce Platform	
Edit   Cl...	Standard User	Salesforce	
Edit   Cl...	System Administrator	Salesforce	

1-11 of 11 0 Selected

Page 1 of 1

3. Go to the profile Sales Manager -> Click Edit -> Give the all custom Object Permission Create, Edit, Delete -> Save.
4. Again, Sales Rep 1 -> Give Access Read Create, Edit.
5. Sales Rep 2 -> Read, Create, Edit.
6. Sales Rep 3 -> Give the all Custom Object Permissions is Read Only -> Save it.

## Milestone 7-New User

### Activity 1:

1. Go to Setup Page -> Search Users in Quick Find -> Select Users -> Click New User.

**Users**

All Users

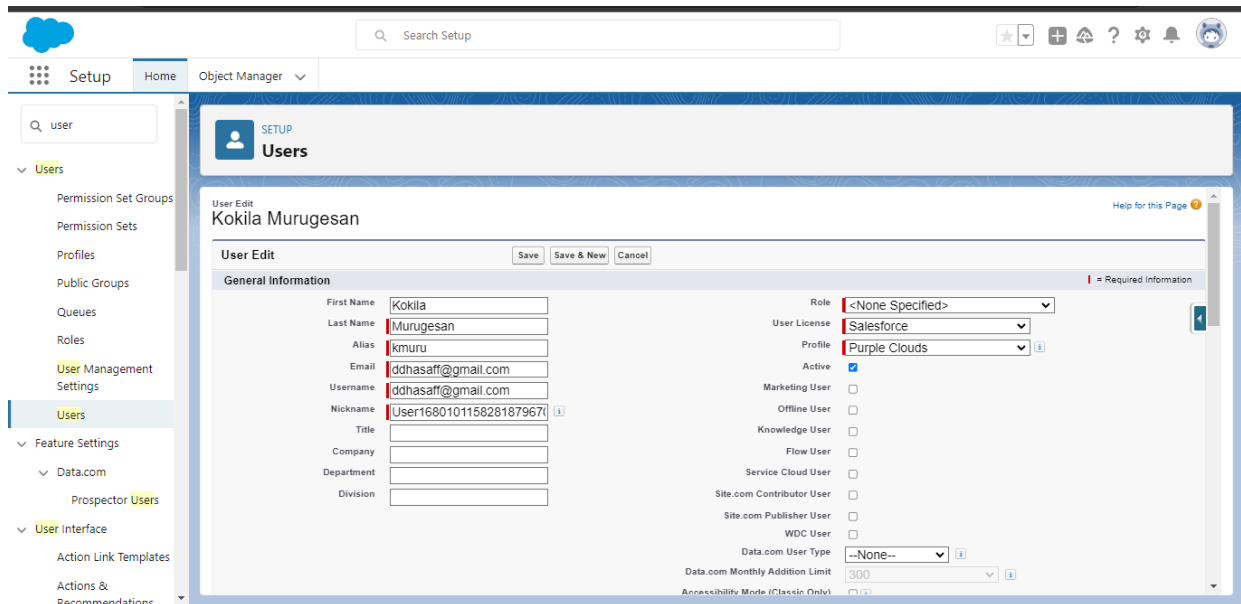
On this page you can create, view, and manage users.  
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatter_00d2w00000rjtaaal\$nomefavbkk6@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	Murugesan Dhasarathan	dmuru	kokilavanimurugesan21@gmail.com	SVP Sales & Marketing	✓	Sales Executive
<a href="#">Edit</a>	Murugesan Kokila	kmuru	ddhasa@gmail.com		✓	Purple Clouds
<a href="#">Edit</a>	Murugesan Kokilavani	kmuru	kokila@comany.sandbox		✓	System Administrator
<a href="#">Edit</a>	User Integration	integ	integration@00d2w00000rjtaaal.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	ses	insightsecurity@00d2w00000rjtaaal.com		✓	Analytics Cloud Security User
<a href="#">Edit</a>	Watson Emma	evats	kokilavanimurugesan20@gmail.com	SVP Sales & Marketing	✓	Marketing Executive

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

2. Fill the details (first Name, Last Name, alias, email id, username, nick name, select role, user, license, profiles) -> Save it.

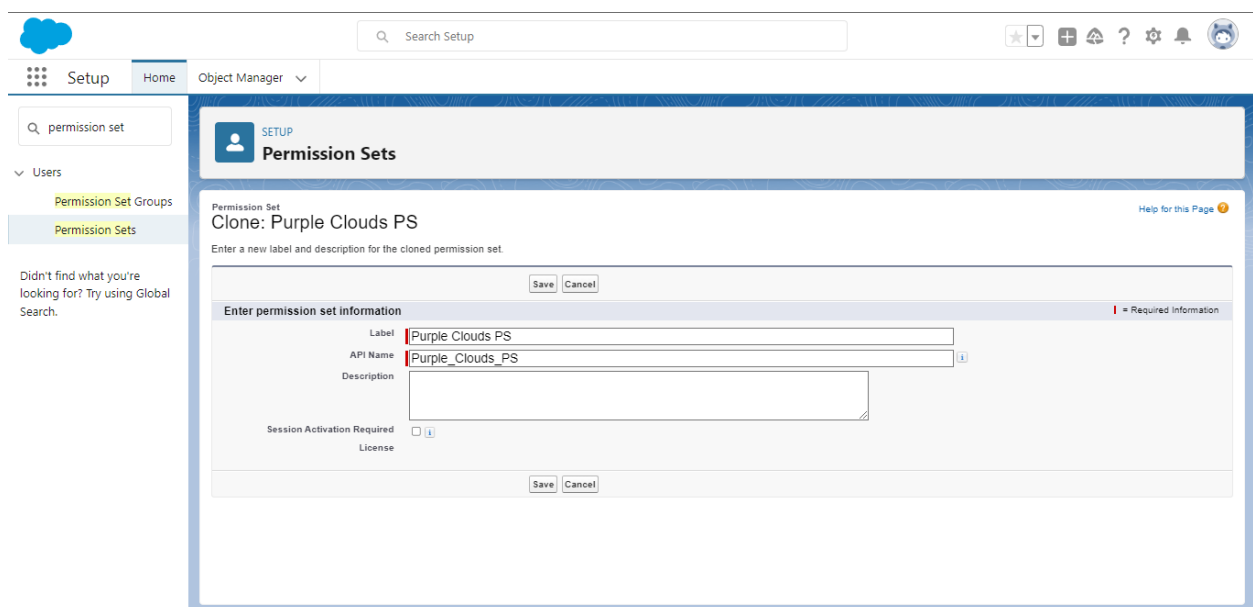


The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar contains a search bar and a navigation menu with categories like Users, Feature Settings, and User Interface. The main content area is titled 'User Edit' for 'Kokila Murugesan'. It includes a 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right, there are dropdown menus for Role, User License, and Profile, along with checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type. At the bottom right, there are fields for Data.com Monthly Addition Limit and Accessibility Mode.

## **Milestone 8-Permission Set**

### **Activity 1:**

**1. Go to Setup Page -> Search Permission Seta in Quick find  
-> Select Permission Sets -> New.**



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar contains a search bar and a navigation menu with categories like Users, Permission Set Groups, and Permission Sets. The main content area is titled 'Permission Set' for 'Clone: Purple Clouds PS'. It includes a section 'Enter permission set information' with fields for Label, API Name, and Description. There are also checkboxes for Session Activation Required and License. At the bottom, there are 'Save' and 'Cancel' buttons.

**2. Enter the Label Name and Save.**

**3. Go to the New Permission Set which you have created -> Click on Manage assignment.**

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', and 'Permission Sets'. The main content area is titled 'Permission Sets' and shows the details for a new permission set named 'Purple Clouds PS'. The 'API Name' is 'Purple\_Clouds\_PS'. The 'Created By' is 'kokilavani.murugesan' on '29/03/2023, 8:09 pm'. The 'Last Modified By' is 'kokilavani.murugesan' on '03/04/2023, 11:37 am'. Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', and 'Visualforce Page Access'.

**4. Now Click on the Add assignment.**

The screenshot shows the 'Current Assignments' section for the 'Purple Clouds PS' permission set. The table lists the following assignments:

Full Name ↑	Active	Role	Profile	User License	Expires On
Emma Watson	✓	SVP, Sales & Marketing	Marketing Executive	Salesforce Platform	
Kokila Murugesan	✓		Purple Clouds	Salesforce	

There is an 'Add Assignment' button in the top right corner of the table.

**5. Finally Select the users and click on Save.**

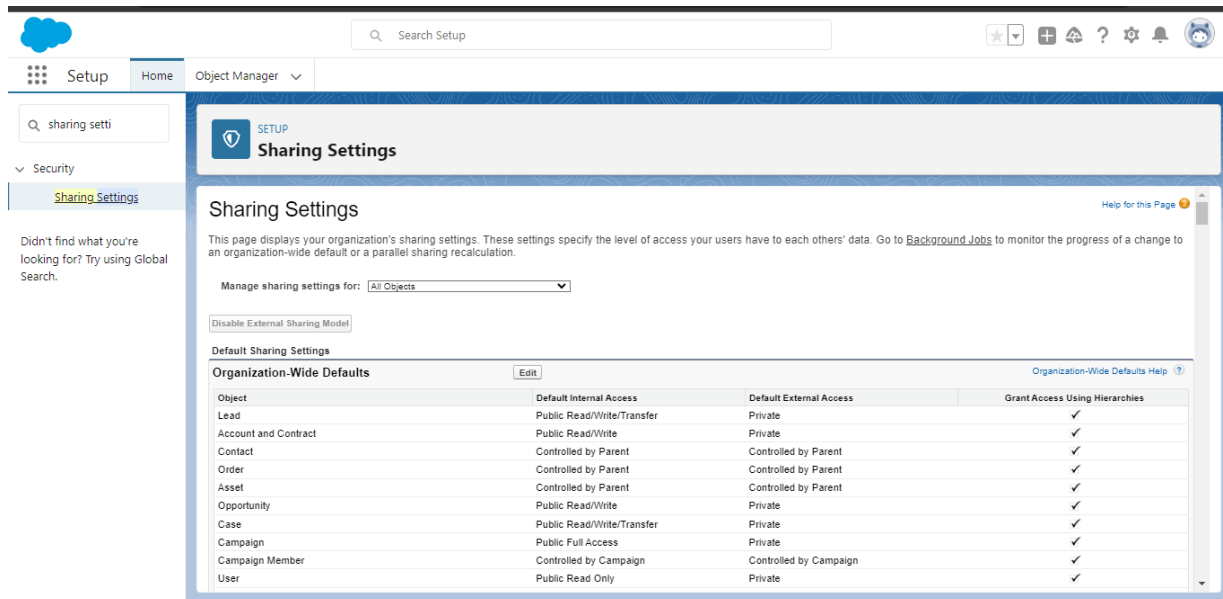


## **Milestone 9-Setup for OWD**

### **Activity 1:**

#### **Create OWD Setting**

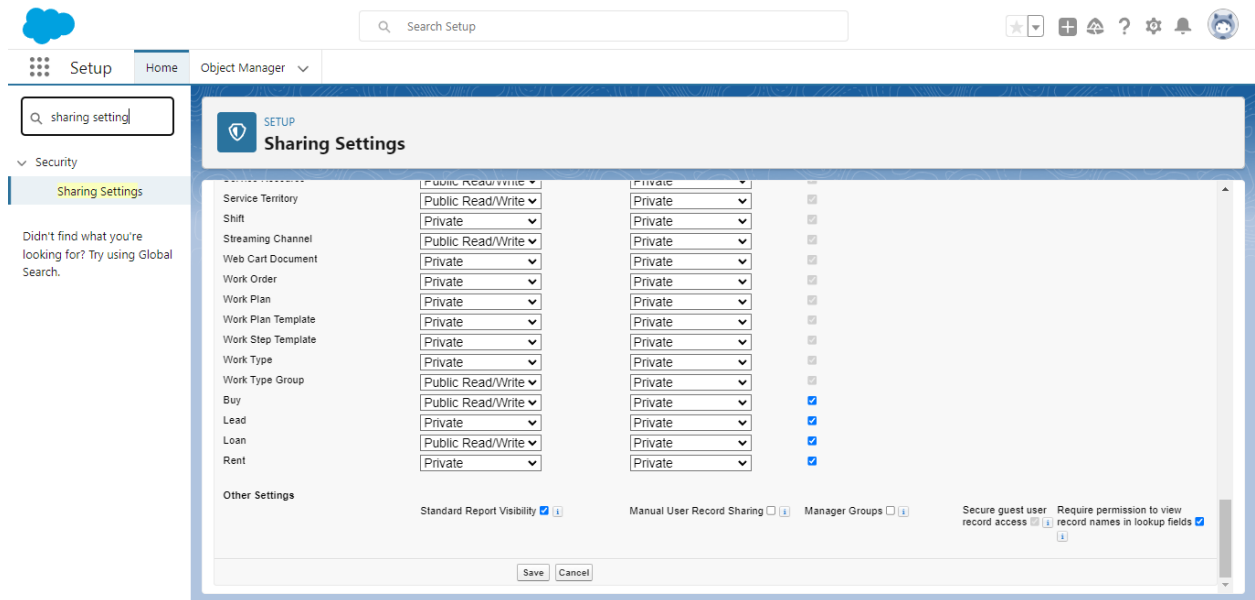
- 1. Go to Setup page -> In quick Find Box Search Sharing Settings -> Click Edit in the Organization-Wide Defaults -> Select Defaults access for each Object.**



The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar contains a search bar and a list of settings categories, including Security and Sharing Settings. The main content area displays the 'Sharing Settings' page, which includes a 'Manage sharing settings for' dropdown menu set to 'All Objects'. Below this is a table titled 'Default Sharing Settings' with the following data:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

- 2. Lead and Rent Select both private for internal and external.**
- 3. Click on Save.**



## Activity 2:

**Marketing: In OWD setting give it as a Private for both Marketing Manager and Marketing Executive.**

**Sales: Same procedure Sales Manager OWD is set as Private for Sales Rep 1 and Sales 2. Save it.**

## Milestone 10-Report

## Activity 1:

### Create Report

1. Go to app launcher (9 dots) -> search Property Management -> Go to the app -> Search Reports in app launcher -> Click on reports tab.

- 2. Click New Report.**
- 3. Select Report Type as Loans -> Click on Start the Report**
- 4. In Outline heading Below select Row as Total Loan Instalments -> Select Column as Loan Name, Interest Rate, Loan Amount.**
- 5. Customize the Report and Save & Run it.**

REPORT ▾  
New Lead with Loan Report ✎ Loans

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically ☒

Total Loan Instalments ▴	Loan: Loan Name ▾	Interest Rate ▾	Loan Amount ▾
1,00,000 (1)	Personal Loan	₹2.00	₹7,35,603.54
Subtotal		₹2.00	₹7,35,603.54
2,00,000 (1)	Bike Loan	₹2.00	₹0.00
Subtotal		₹2.00	₹0.00
5,00,000 (1)	Education Loan	₹1.00	₹0.00
Subtotal		₹1.00	₹0.00
10,00,000 (1)	Home Loan	₹1.50	₹77,22,588.61
Subtotal		₹1.50	₹77,22,588.61
1,00,00,000 (1)	Business Loan	₹1.75	₹13,66,77,323.85
Subtotal		₹1.75	₹13,66,77,323.85
Total (5)		₹8.25	₹14,51,35,516.00

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒ Conditional Formatting

**Go to the object Manager -> Click Loan Object -> New -> create the records in Loan Object -> save.**

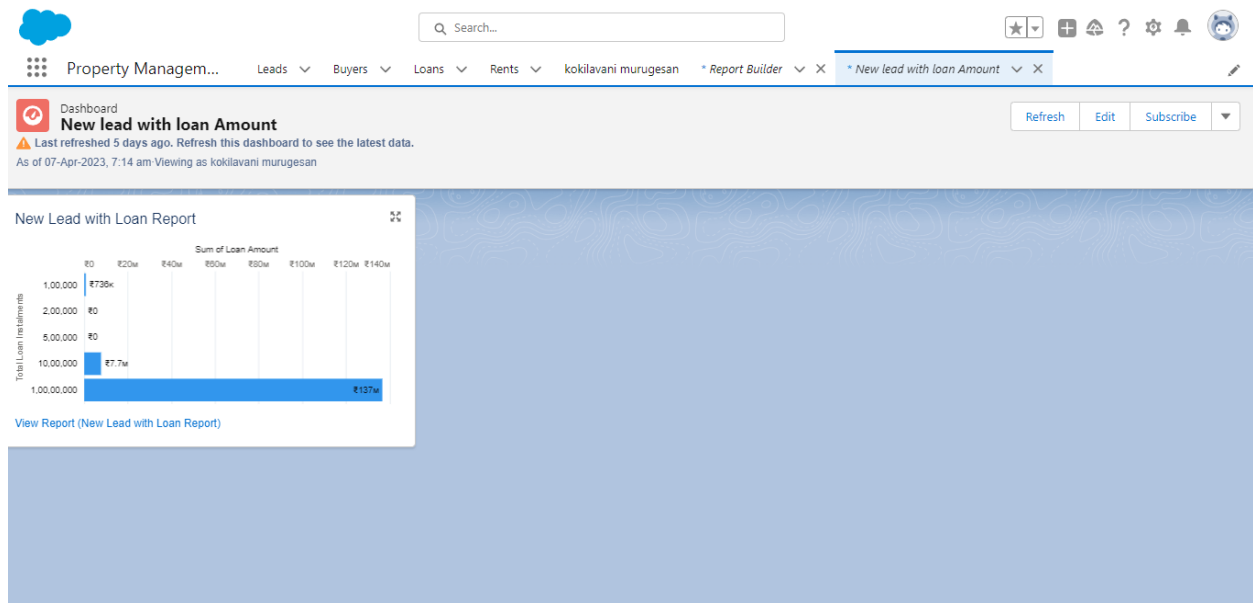
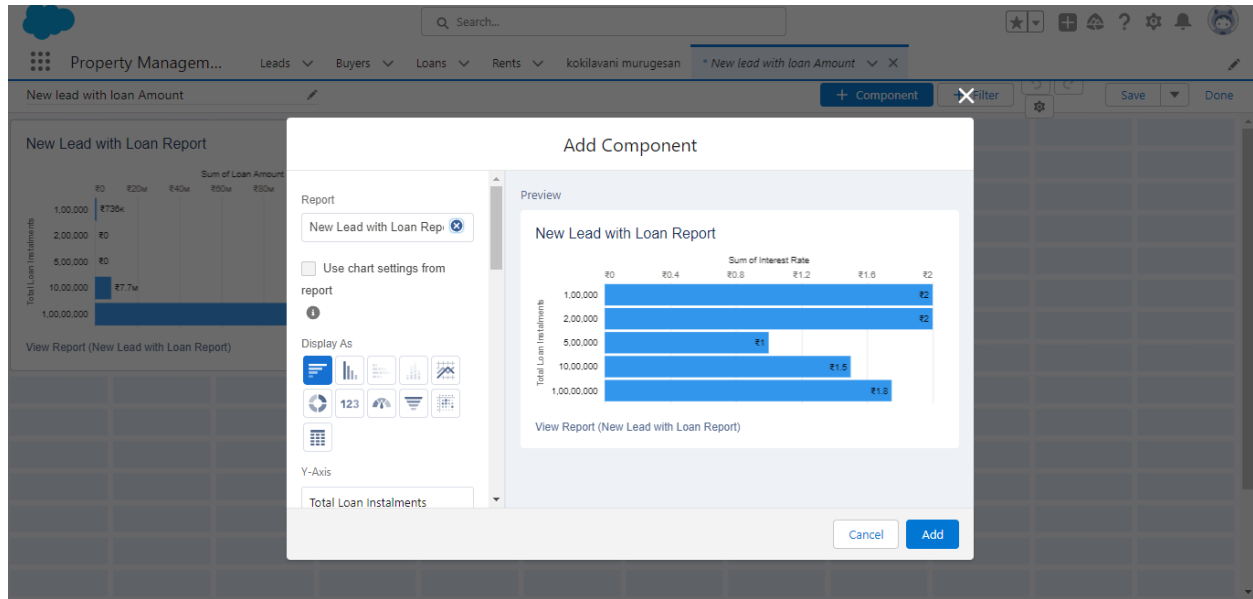
## **Milestone 11-Dashboards**

### **Activity 1:**

#### **Create Dashboards**

- 1. Go to the App Launcher and select the Dashboards.**
- 2. Select New Dashboards give the name New Lead with Loan Report and Select Folder Loan Amount -> Create.**

3. Select the Report New Lead with Loan Report -> Select
4. Click on +component -> Select the display chart -> Add.

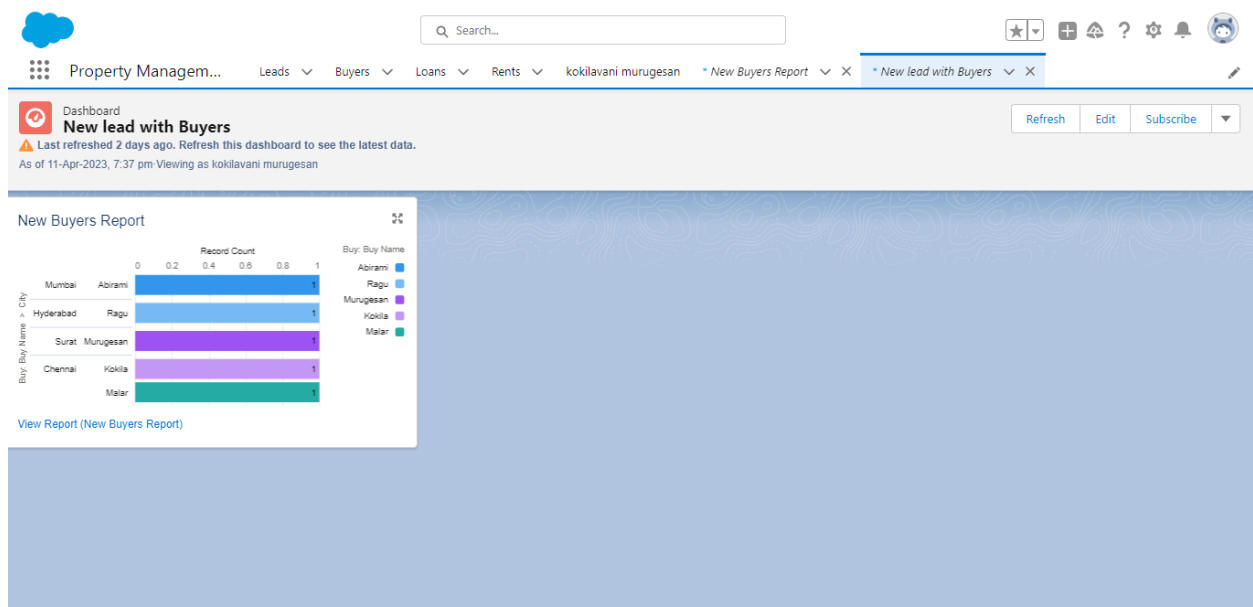


5. Save it.

## Activity 2:

## Create Dashboard

1. First Create the Records to the same procedure (Buyers).
2. Create Reports as same (Buyers)
3. Create the Dashboard give it as a name New Lead with Buyers Report -> +component and Add the chart.
4. Next Save.
5. Display it in the home page.



## TRAILHEAD PROFILE PUBLIC URL

Team lead - <https://trailblazer.me/id/kokila200>

Team Member 1 - <https://trailblazer.me/id/suvi2003>

Team Member 2 - <https://trailblazer.me/id/abirami1218>

Team Member 3 - <https://trailblazer.me/id/ssneka8>

## **ADVANTAGES AND DISADVANTAGES**

### **ADVANTAGES**

- ❖ *You'll save time and money by being more efficient.*
- ❖ *You can access your data from any locations.*
- ❖ *By improving your online presence, you will increase bookings.*
- ❖ *Using the built-in pricing tools, you can optimize your revenue system.*
- ❖ *Represents a centralized, efficient document platform.*
- ❖ *Property Management systems make it easier for coordinating the functions of the front office, guest management, sales, planning, and reporting.*

### **DISADVANTAGES**

- ❖ *You'll be reliant on a single vendor.*
- ❖ *In the beginning, the cost may be prohibitive.*
- ❖ *Time consuming if you choose the wrong system.*
- ❖ *Scaling revenue.*
- ❖ *Project cost, Lack of time.*
- ❖ *Keeping up with maintenance requests.*

### **APPLICATIONS**

- *Reservation Management.*
- *Yield Management*

- *Marketing and Sales Support.*
- *Registration*
- *Inquiries/Reports*
- *Maintenance Management.*
- *CRM & guest communication.*
- *Mobile Apps.*

## **CONCLUSION**

- ❖ *In conclusion, Property Management System (PMS) software is very crucial for all Hotels. Property Management is 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.*
- ❖ *Property management has long been overlooked in the real estate industry, but the future of property management is brighter than ever.*

## **FUTURE SCOPE**

- ✓ *Technical proposal writer.*
- ✓ *Commercial broker.*
- ✓ *Resident Architect.*
- ✓ *Property Manager.*
- ✓ *Preventive maintenance, cleaning, interior and exterior, and construction will all fall within the*

***scope of the responsibilities of a property management firm.***