

PROJECT REPORT TEMPLATE

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1.INTRODUCTION

1.1 OVERVIEW:

Develop an app for the Property Management where Buyer can order his Requirement and Get the Appropriate Details of the Property. Accounting to his interest just provide him with some discounts up to what extent he can get the discount. Also Track Whether he is 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 the reports and dashboard so there will be clear view just get the reports on the count of loan past getting the Property purchased close the deal.

1.2 PURPOSE:

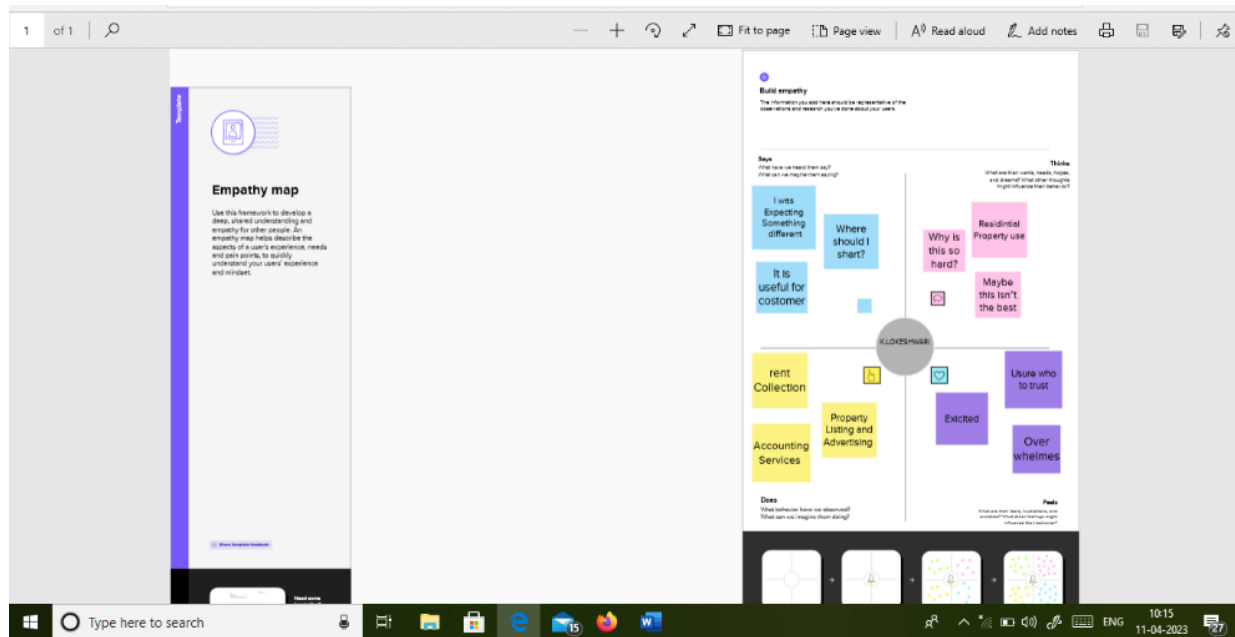
A property Management App is a piece of software that helps automate corporate procedures in the real estate industry and reduce manual labour to minimum. Some of these can include billing services, booking reservations, checking in or out showing the property, automatic listing and marketing. It can also provide landlords and tenants with the possibility of instant communication as well as virtual 3D property tours.

What we will learn

- Real-time Salesforce Project
- Object and Relationship in salesforce

2.PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP:



2.2 IDEATION & BRAINSTROMING MAP:

1 of 1

Fit to page Page view Read aloud Add notes

1 Define your problem statement

What problem are you trying to solve? Frame your problem as a "how might we..." statement. This will be the focus of your brainstorm.

Key roles of brainstorming

- Brainstorm
- Brainstorm
- Brainstorm
- Brainstorm

2 Brainstorm

Write down any ideas that come to mind that address your problem statement.

Key roles of brainstorming

- Brainstorm
- Brainstorm
- Brainstorm
- Brainstorm

3 Group ideas

Take turns sharing your ideas with a partner or related notes as you go. Once all ideas have been shared, discuss the ideas and create a central idea. It is okay to ignore that is already noted by you and others and create it up the entire group.

Key roles of brainstorming

- Brainstorm
- Brainstorm
- Brainstorm
- Brainstorm

4 Prioritize

Your team should all be on the same page about which ideas are important. Rank your ideas on this grid to determine which ideas are important and which are feasible.

Key roles of brainstorming

- Brainstorm
- Brainstorm
- Brainstorm
- Brainstorm

3.RESULT

3.1 DATA MODEL:

Object Name	Fields in the Object	
Lead	Field Label	Data type
	Lead	Auto Number
	State	Picklist
	City	Picklist
	E-Mail	Email
	Phone	Phone
Buy	Field Label	Data type
	Property Type	Picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
	Annual Amount to be paid	Currency
Rent	Field Label	Data type
	Rent	Auto Number
	Rental City	Text
	BHK Type	Picklist
Loan	Field Label	Data type
	Loan Id	Auto Number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total Loan Instalments	Number
	Loan Repayment	Number
	Loan Amount	Formula

3.2 ACTIVITY & SCREENSHOT:

Milestone 2- Object

Activity1:Objects

To Navigate to Setup page:

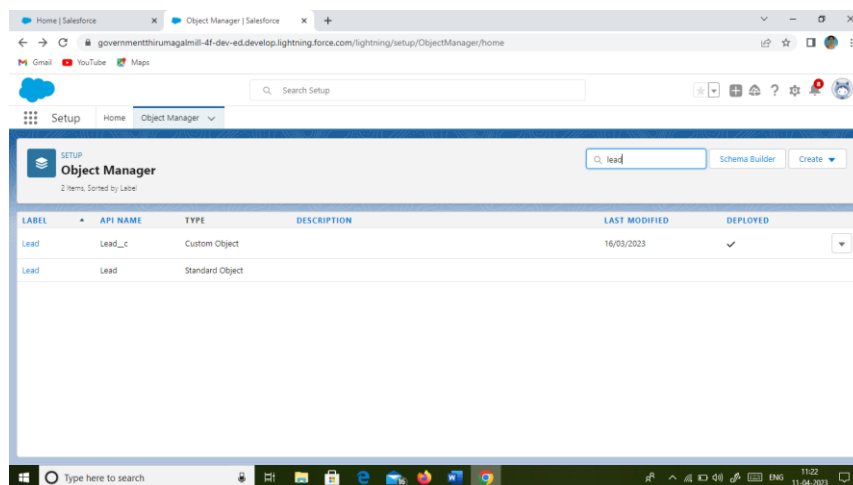
1. Click on gear icon → click setup.

To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

On Custom object defining page:

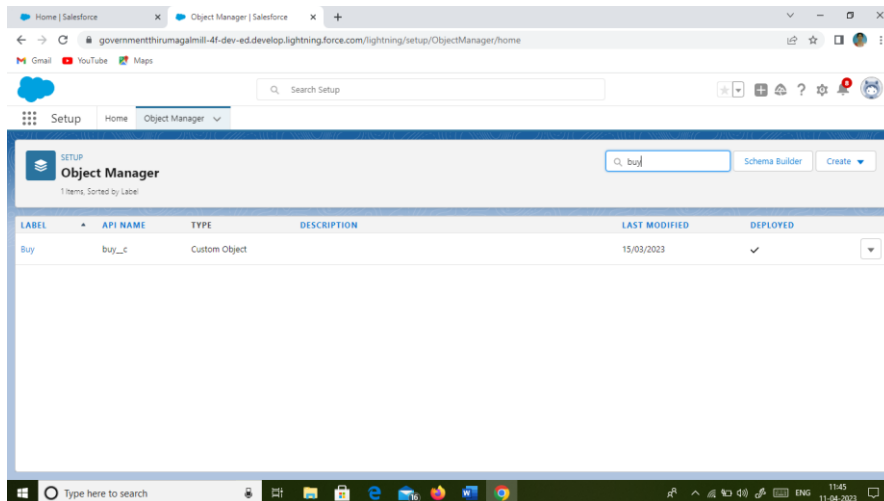
3. Enter the label name, plural label name, click on Allow reports, Allow search → Save



Activity2:

Create Object Buy

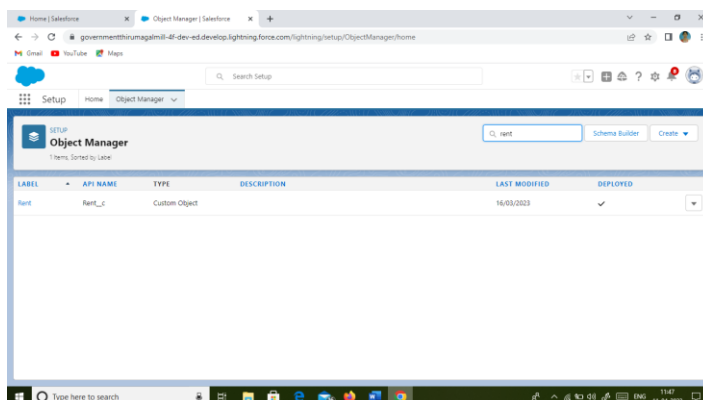
1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name → Buy
4. plural label name → Buyers
5. click on Allow reports,
6. Allow search → Save



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

7. To create an object:

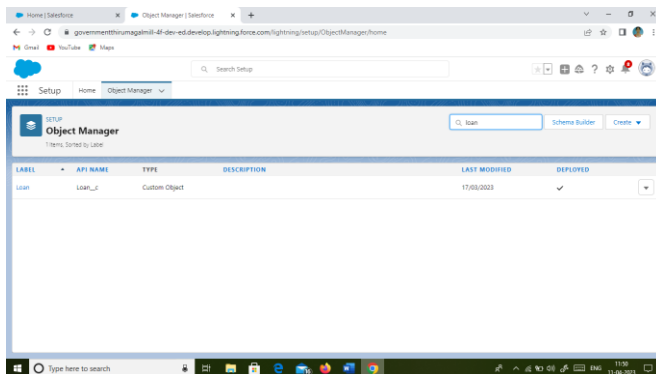
8. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

9. Enter the label name→Loan

10.plural label name→ Loans

11. click on Allow reports,

12.Allow search →Save



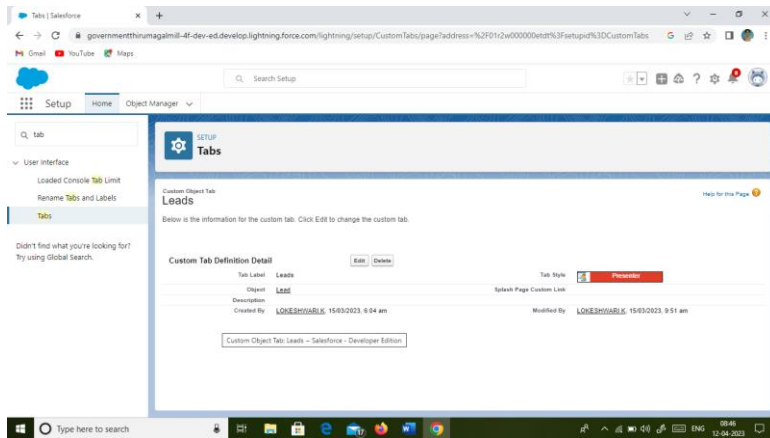
Milestone 3:Tab

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)

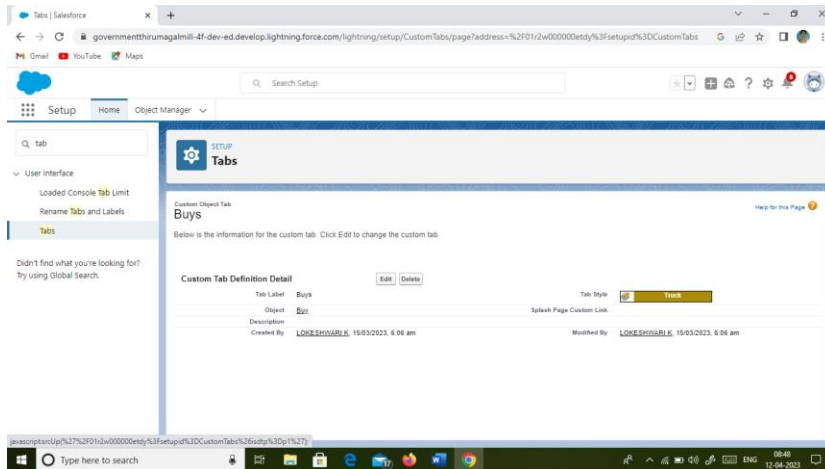
2. Select Object(Lead) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.



Activity 2:

To create a Tab:(Buy)

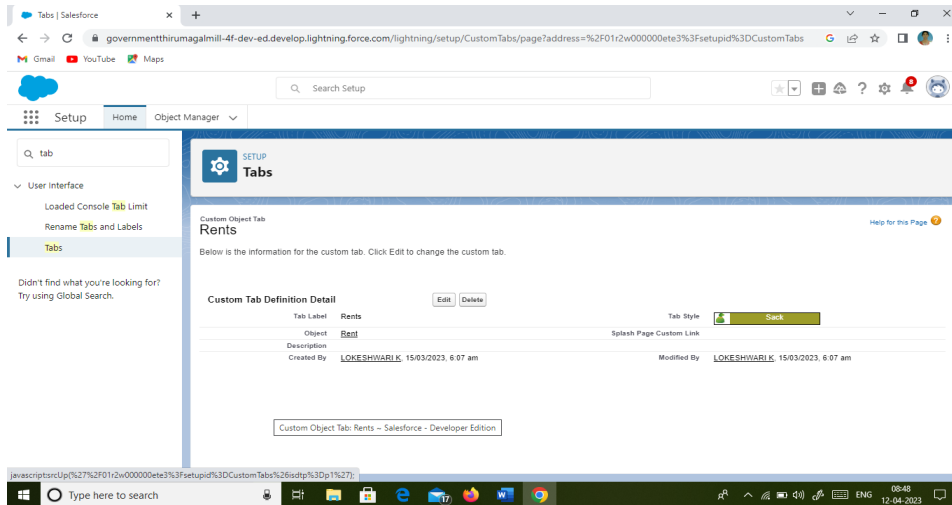
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.



Activity 3:

To create a Tab:(Rent)

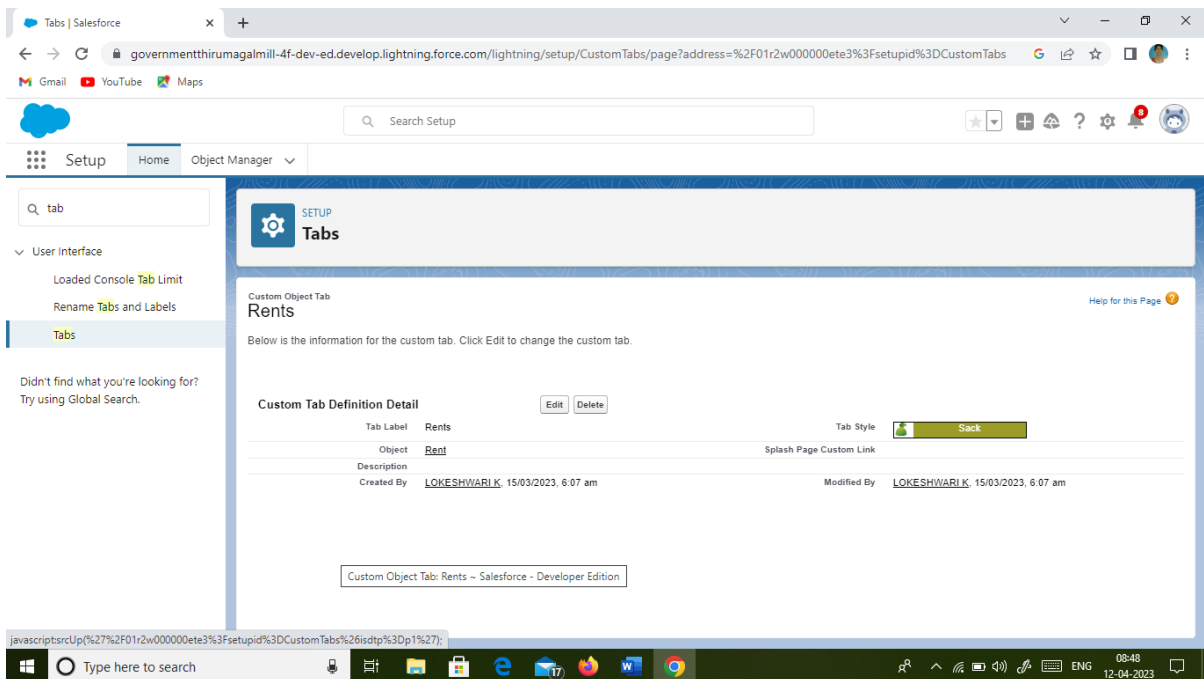
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object(Rent) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save



Activity 4:

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(Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save



Milestone 4- The Lightning App:

Activity1:

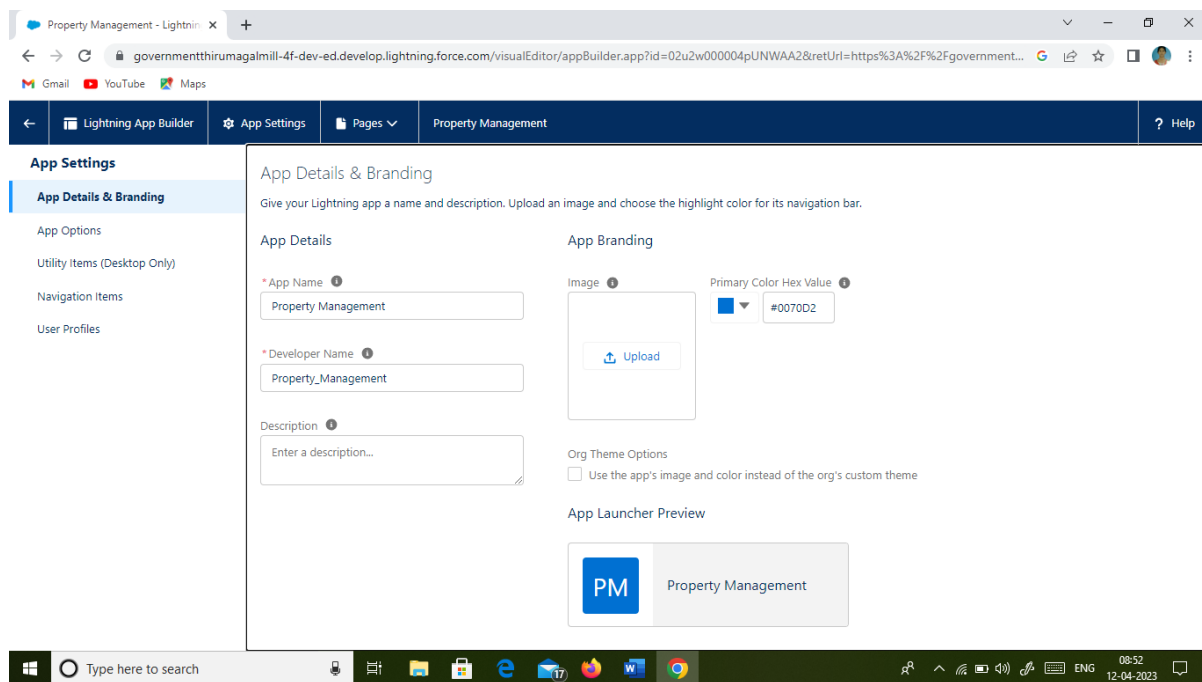
Create the Lightning App 1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.

2. Fill the app name as an 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)(add tabs Lead, Buy, Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform user, Standard User → Next.

4. To Add Navigation Items: Select the items from the search bar and move it using the arrow button → Next.

5. To Add User Profiles: Search profiles in search bar → click on the arrow button → save & finish.



Milestone5-Fields

Activity 1:

Create the Lead Field

1. Go to setup → click on Object Manager → type object name in search bar → click on the object
2. Now click on “Fields & Relationships ” → New.
3. Fill the field label name Lead → Next → Next → Save.

Lead:(AutoNumber Created Field while creating Object)→L-{0000}

State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

City: Create the Picklist(Mumbai, Pune, Nashik)(Field Dependency)

Email: Create the Email Select the Data Type As Email (Email)

Phone: Select the Field Data type as (Phone)

Activity2:

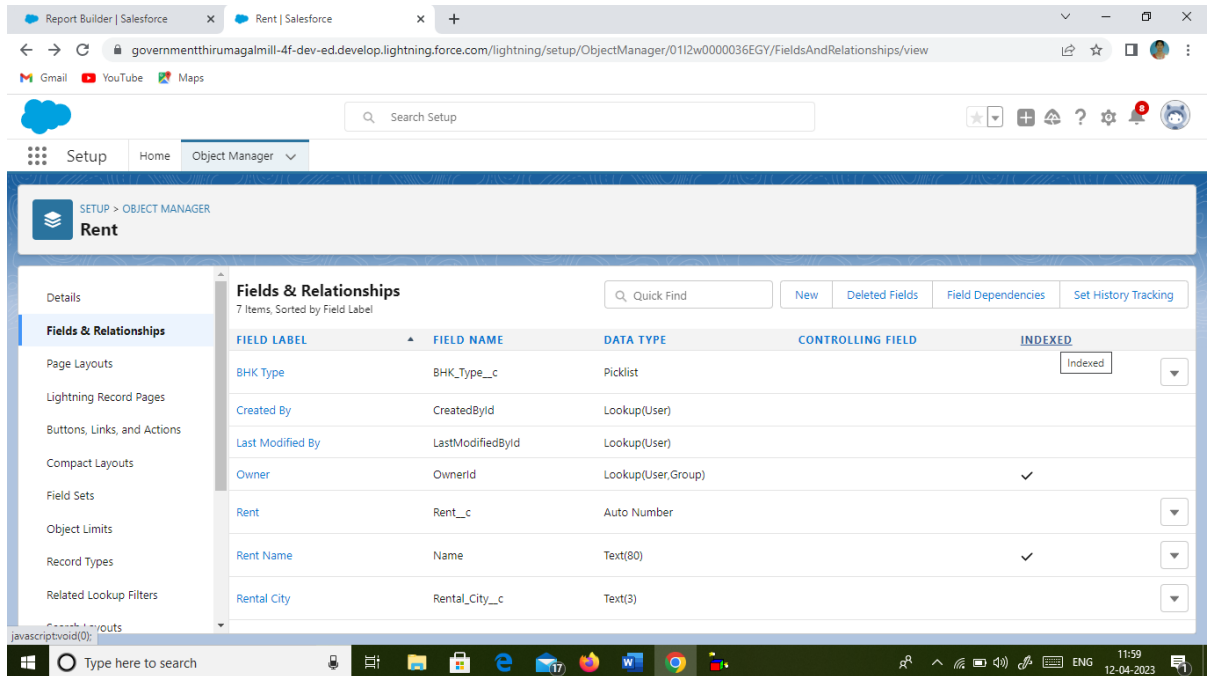
For Object Buy

1. Create Field for Buy
2. Create Property Type: (Picklist) (Residential, Commercial, Industrial)
3. Discount:(Percentage As the Field Data Type)
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:

Create Field for Rent

1. Rent:(Auto Number while Creating the object)→ R-{0000}
2. Rental City: Select the Text as the Field Data Name(Any City)
3. BHK type:(Picklist)(1BHK, 2BHK,3BHK)



Activity4:

Create Field for Loan

1. Loan Id: Auto generated Field Take it as Auto number LN-{0000}
2. Interest Rate: (Select the Field Data Type As Currency)
3. Term:(Select the Field Data type as Number)
4. Annual Loan Field create the Number as the field datatype
5. Total Loan Instalments:(Field create the Number as the field data type)
6. Loan Repayment(Field create the Number as the 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 and write the following formula

$$(\text{Loan_Repayment_c} * (((1 + (\text{Interest_rate_c} / 52))^{\text{Term_c}}) - 1)) / ((\text{Interest_rate_c} / 52) * ((1 + (\text{Interest_rate_c} / 52))^{\text{Term_c}}))$$

- ## 2. Marketing Manager Should Have Access to Marketing Executive

Activity3-Sales:

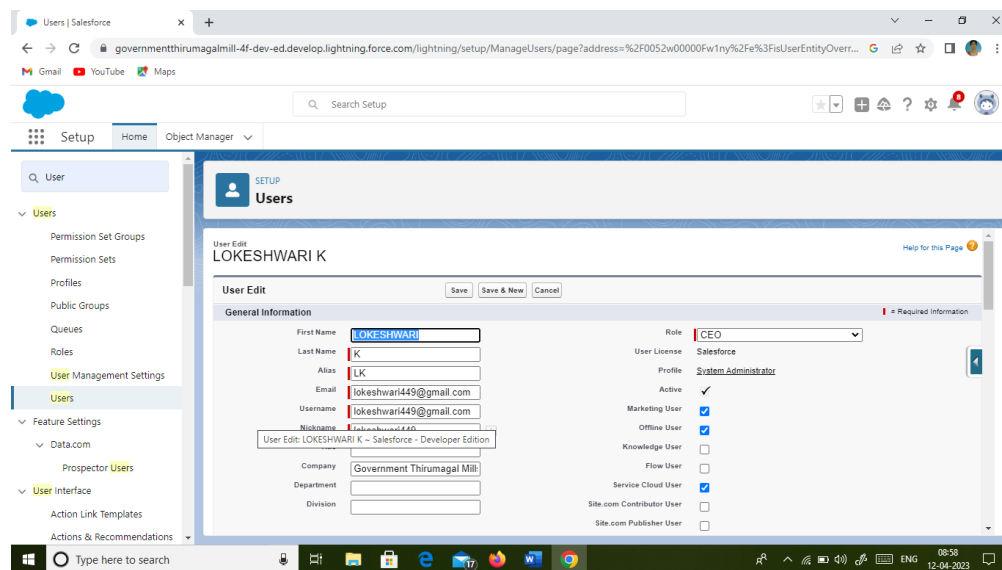
1. In the Profile Level Sales Manager is Having Create, Edit, Delete 2. For Sales Rep1→ Read, Create, Edit
3. For Sales Rep2→Read, Create, Edit
4. For Sales Rep3→ Read only.

Milestone7-New User

Activity 1:

Create User

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.

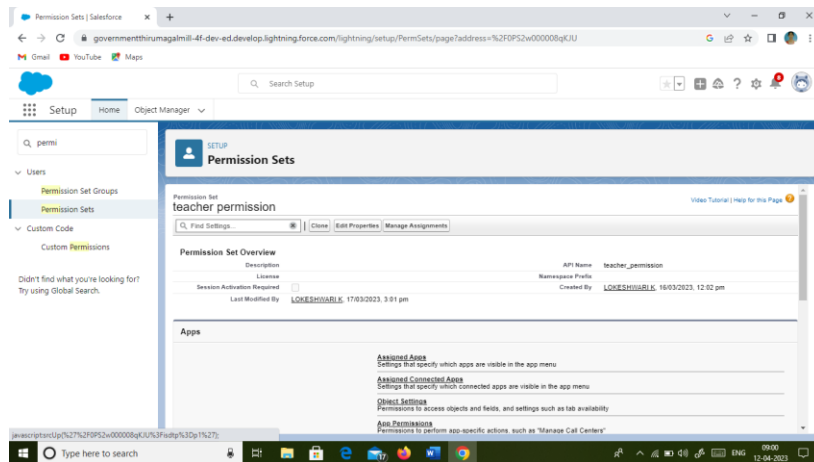


Milestone8-Permission Set

Activity 1:

- Create the Permission Sets
1. Go to setup → type “permission sets” in quick search → select permission sets → New.
 2. Enter the label name → save.
 3. After saving the permission click on the Manage assignment
 4. Now click on the Add Assignment
 5. Now select the users and click on save

6. Go to permission set and add the access For Sales Rep3 give Access with Create permission for the User

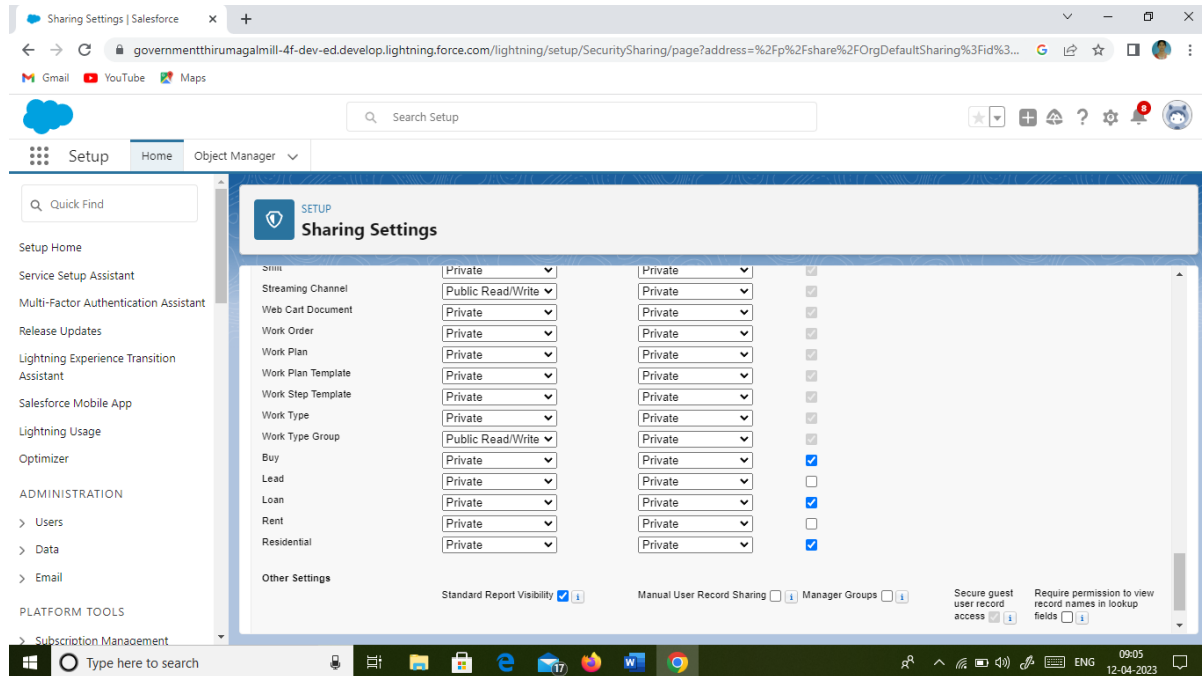


Milestone 9: Setup For OWD

Activity1:

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 Lead, Rent 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



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 Rep1, Sales Rep2 same OWD for them

Milestone10-Report

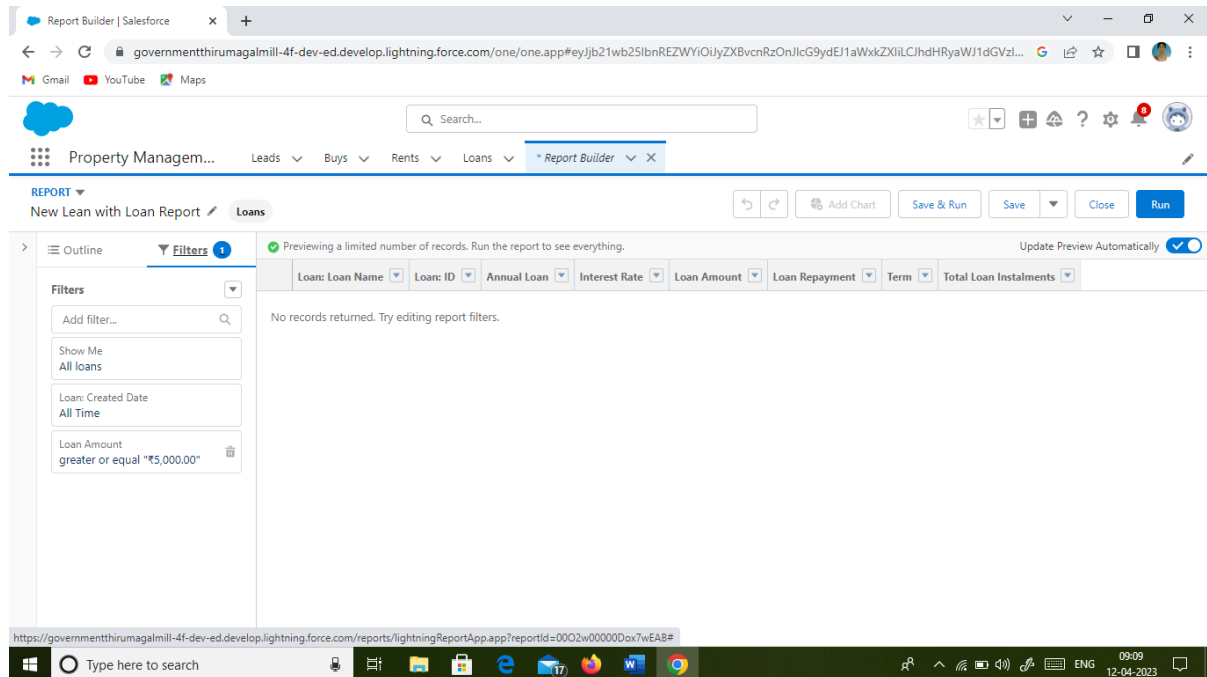
Activity 1:

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 → click on start report.
4. Customize your report, then save or run it.

Create Report for following Condition

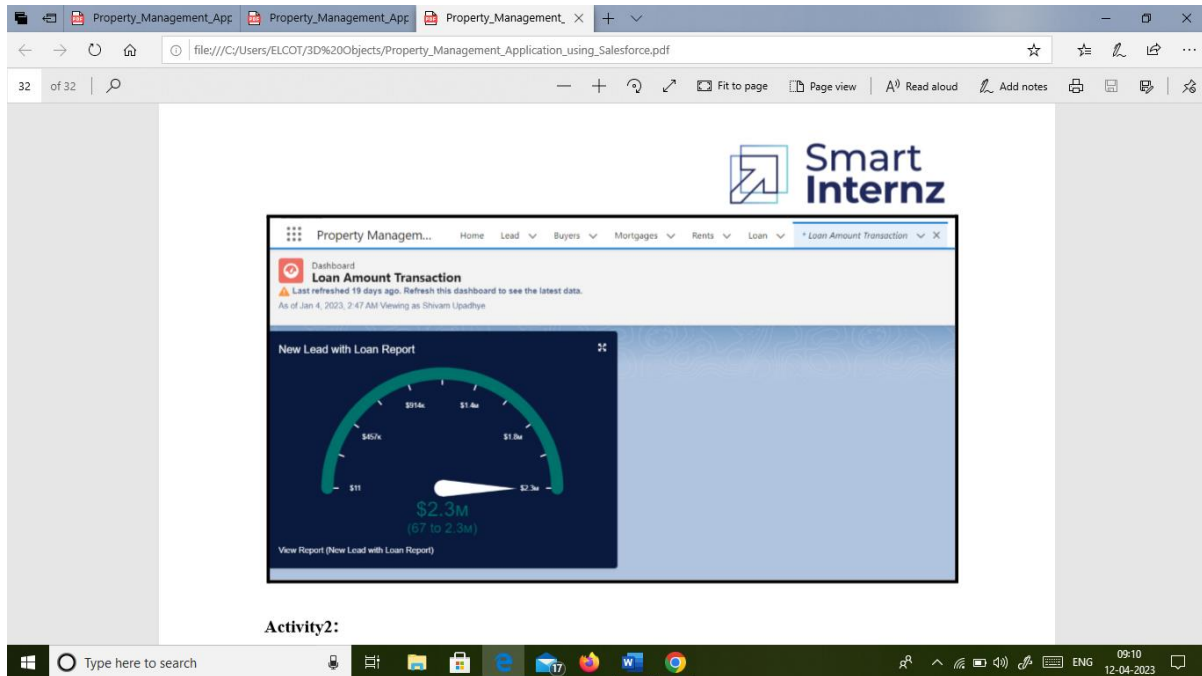
1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the Property
2. The Condition should be Like Loan Amount \geq to 5000\$



Milestone11-Dashboards

Activity1:

- Create dashboards
1. Go to the App Launcher and select the Dashboards
 2. Select add component
 3. Select the folder select the following option new lead with loan Amount
 4. Select in which format you want display chart



Activity2:

Create Dashboard

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

4. TRAILHEAD PROFILE PUBLIC URL

K.Lokeshwari - <https://trailblazer.me/id/lokeshwari449>

U.Vinothini - <https://trailblazer.me/id/lokeshwari449>

V.Sobana - <https://trailblazer.me/id/lokeshwari449>

M.Ranjini - <https://trailblazer.me/id/lokeshwari449>

6. ADVANTAGES & DISADVANTAGES

Advantages:

- Salesforce helps business keep track of customer interactions and sales data.
- It can manage Leads, Contacts, Opportunities and Cases.
- It provides Automatic backups.
- Salesforce also offers several features to help business automate their sales and marketing processes, such as Email marketing, Lead Capture and lead Scoring.
- Provides real-time coordination between multiple users.
- Automates daily operational workflow.
- Automates finances and maintenance.

Disadvantages:

- Time-Consuming if you choose the wrong system. Make sure you analyze your own business the scope of the project you Lead and work on and decide on the type of the property management system which will suit you the best.
- Might seem expensive for a small business.
- Training (cost and time). This depends on the readiness of your staff to learn.

6. APPLICATIONS

- A Property Management System (PMS) is a software application for the operation of hospitality accommodations and commercial residential rental properties.
- PMS is also used in manufacturing, industries local government and manufacturing.
- Leverage real-time Reports and Dashboards.
- Streamline lead, opportunity and contact management.
- Simplify Document management and data sharing.
- Enhance communication and collaboration tools.
- Less manual work.
- Better tracking for buyers, Agents and records.

7. CONCLUSION

In Conclusion, Property management application software is very crucial for all the residential rental property. Provide all the tools the rental property needs in order to operate effectively.

8. FUTURE SCOPE

- * Handle details for rent and sale of property from clients.
- * Carry out data analysis and statistical inference.
- * Allow different departments of a branch to access specific files through application program designed specially for them.