

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

Introduction :

Create a property management app where buyers may place orders and receive pertinent information about properties. Simply offer him discounts in accordance with his interests, up to the maximum amount he is eligible to receive. Track his interest in taking the loan, and then simply determine the maximum loan amount the person is eligible to receive. Ensure security for two distinct profiles, such as those for the marketing and sales teams. Then In order to finish the deal, create the reports and dashboard so that there will be a clear perspective. Just receive the information on the number of loans that have been approved and the properties that have been bought.

1.1 Overview :

An app is a group of components that work together to accomplish a certain task. With Lightning Experience, our users can access collections of objects, tabs, and other items in a single handy bundle in the navigation bar in the Lightning applications.

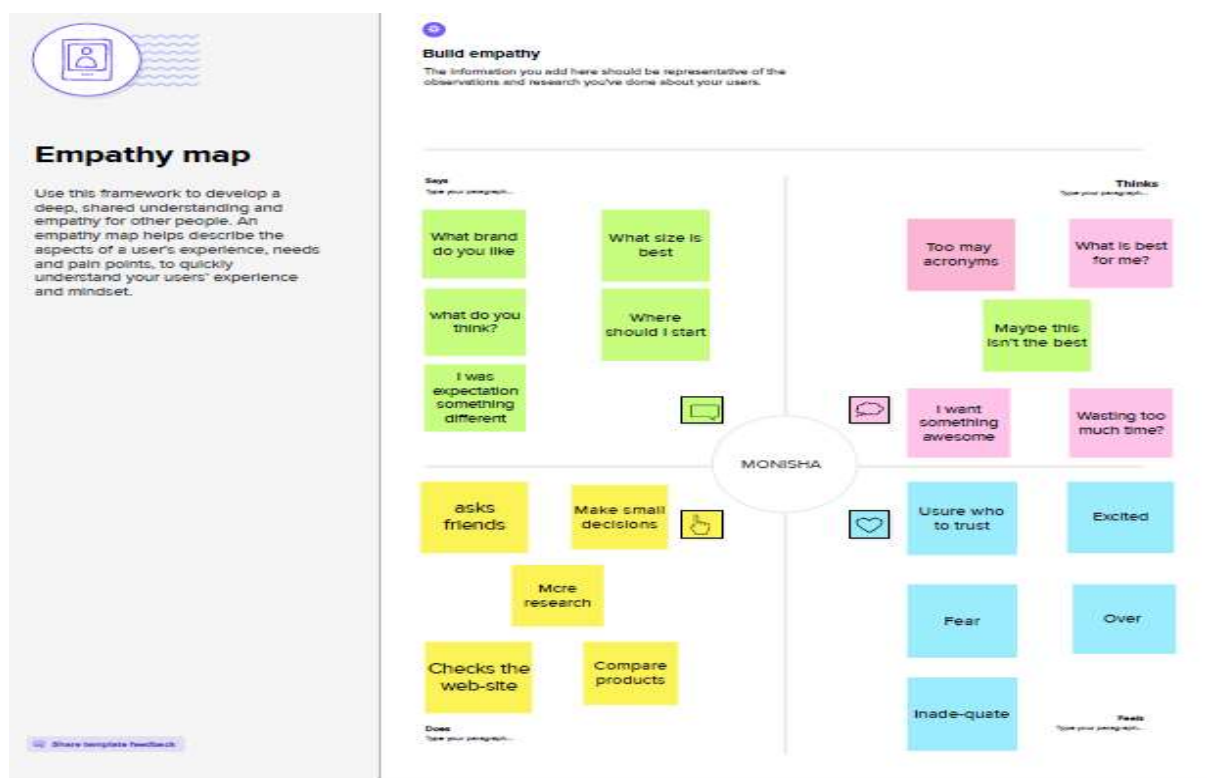
With Lightning apps, can give our apps a unique colour and branding. Even a utility bar and Lightning page tabs can be added to our Lightning app and members may work more productively by quickly switching between apps.

1.2 Purpose :

Develop an App for the Property Management where Buyer can order his Requirements and get the Appropriate Details of the Property. 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.

Problem Definition & Design Thinking

2.1 Empathy Map



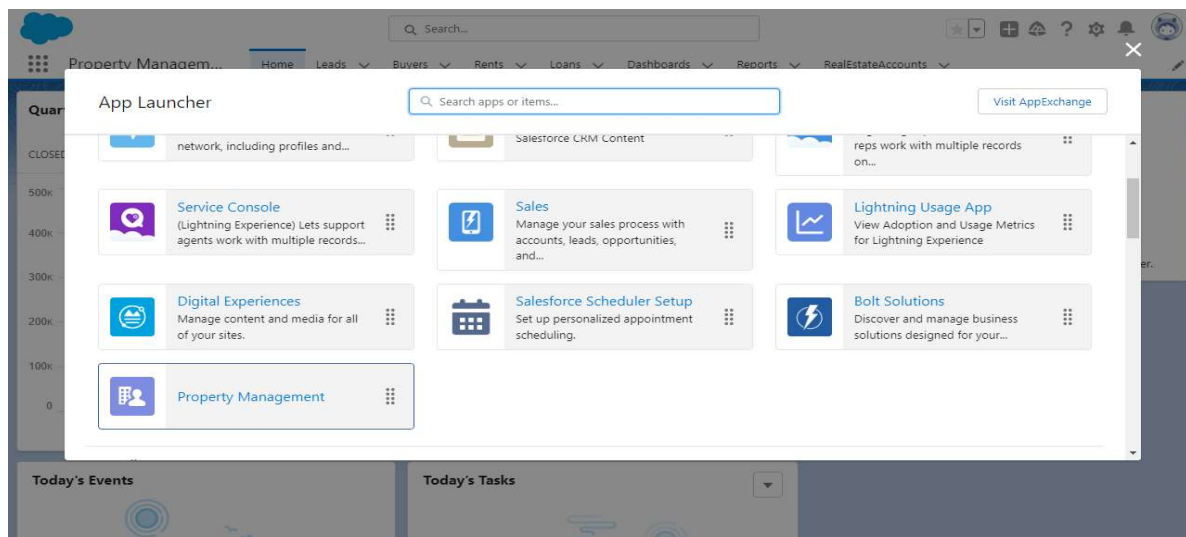
RESULT

3.1 Data Model

Object Name	Fields In Object	
Object BUY	Field Label	Data Type
	Buy	Picklist
	Discount	Percentage
	State	Picklist
Object RENT	Field Label	Data Type
	Rent	AutoNumber
	Rental City	Text
	BHK type	Picklist

3.2 Activity & Screenshot

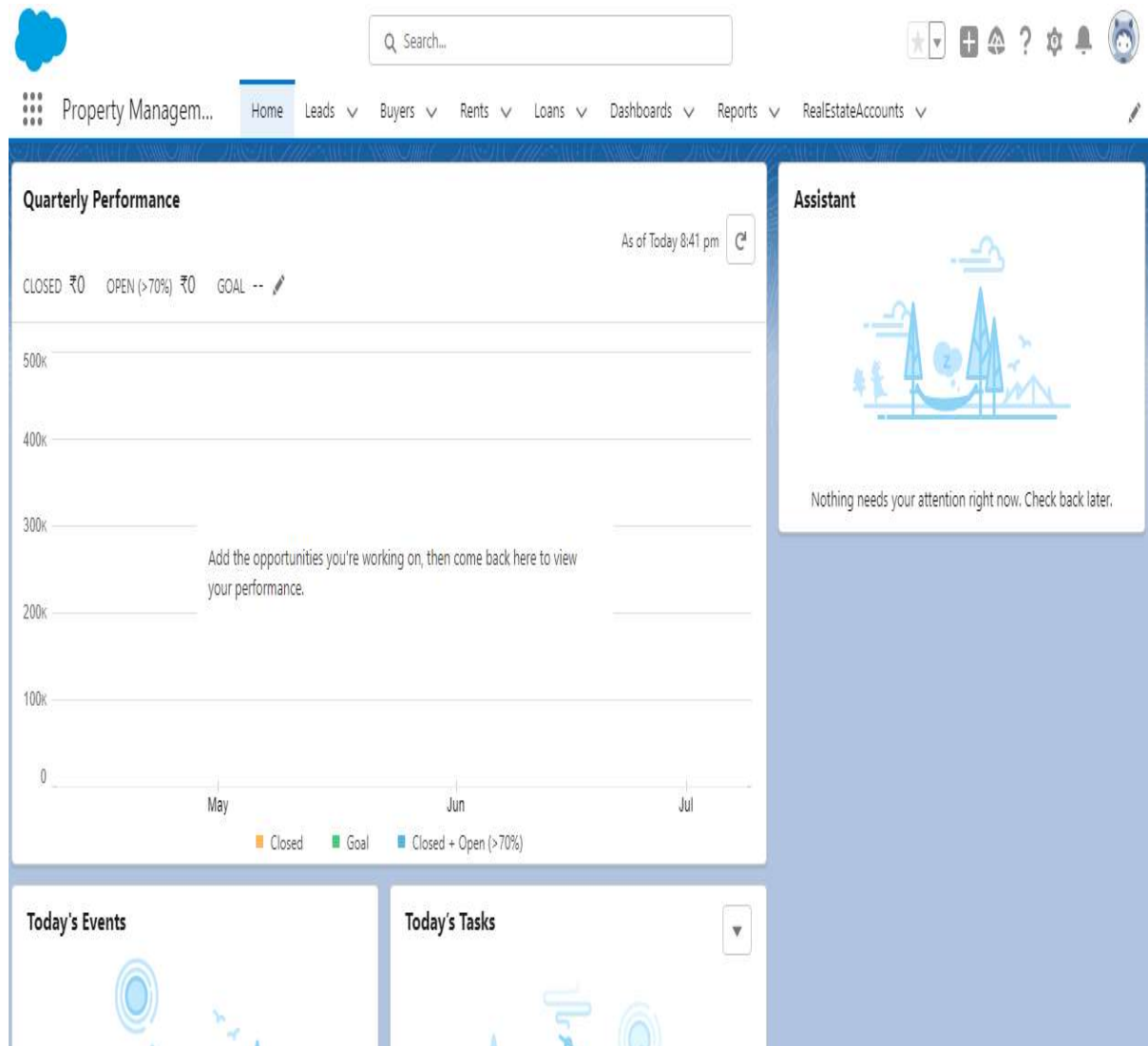
Screenshot 1: Property management App Launcher



To launch property management app requires to click on the app menu button and navigates to project label from popup window.

Screenshot 2 : Property management App Home page

Once app launched it will arrive to home page for further managing the details of individual operation of property management.



Screenshot 3: Buyers tray

To maintain the details about buyers and other related information need to click on the buyers tray button and use new for adding new entry,

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⚙️

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Property Managem...

Home

Leads

Buyers

Rents

Loans

Dashboards

Reports

RealEstateAccounts

Buyers

Recently Viewed

New

Import

Change Owner

11 items • Updated a few seconds ago

⚙️

🔍

🔄

✎


🗑️

🔼

<input type="checkbox"/>	buy Name	
1	<input type="checkbox"/> Dress	▼
2	<input type="checkbox"/> Diamond	▼
3	<input type="checkbox"/> Flat	▼
4	<input type="checkbox"/> Vegetabals	▼
5	<input type="checkbox"/> Platinum	▼
6	<input type="checkbox"/> Steels	▼
7	<input type="checkbox"/> Van	▼
8	<input type="checkbox"/> Jewels	▼
9	<input type="checkbox"/> Bus	▼
10	<input type="checkbox"/> Land	▼
11	<input type="checkbox"/> house	▼

Screenshot 3: Rents tray

To maintain the details about rents and other related information need to click on the rents tray button and use new for adding new entry,




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Property Managem...

Home

Leads

Buyers


Rents

Loans

Dashboards

Reports

RealEstateAccounts

 Rents

Recently Viewed

New

Import

Change Owner

⚙

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↺

✎

🔄

🔍

15 items • Updated a few seconds ago

	<input type="checkbox"/> Rent Name	
1	<input type="checkbox"/> House	▼
2	<input type="checkbox"/> House	▼
3	<input type="checkbox"/> House	▼
4	<input type="checkbox"/> House	▼
5	<input type="checkbox"/> House	▼
6	<input type="checkbox"/> House	▼
7	<input type="checkbox"/> House	▼
8	<input type="checkbox"/> House	▼
9	<input type="checkbox"/> House	▼
10	<input type="checkbox"/> House	▼
11	<input type="checkbox"/> House	▼
12	<input type="checkbox"/> House	▼
13	<input type="checkbox"/> House	▼
14	<input type="checkbox"/> House	▼

Screenshot 4: Loans tray

To maintain the details about loans and other related information need to click on the loans tray button and use new for adding new entry,

The screenshot shows the 'Loans' tray in a property management system. The top navigation bar includes a search bar and various icons. The 'Loans' menu item is highlighted. Below the navigation bar, the 'Loans' section is displayed with a 'Recently Viewed' tab. The 'New' button is visible. A list of 15 items is shown, each with a checkbox and a dropdown arrow. The list includes: 1. Bus, 2. Ambulance, 3. Boat, 4. Auto Ricksha, 5. Van, 6. Jeep, 7. Scooty, 8. Truck, 9. Thinks, 10. Taxi, 11. TVS, 12. Tempoes, 13. cars, and 14. Bikes.

Property Managem... Home Leads ▾ Buyers ▾ Rents ▾ Loans ▾ Dashboards ▾ Reports ▾ RealEstateAccounts ▾

Loans
Recently Viewed ▾

15 items • Updated a few seconds ago

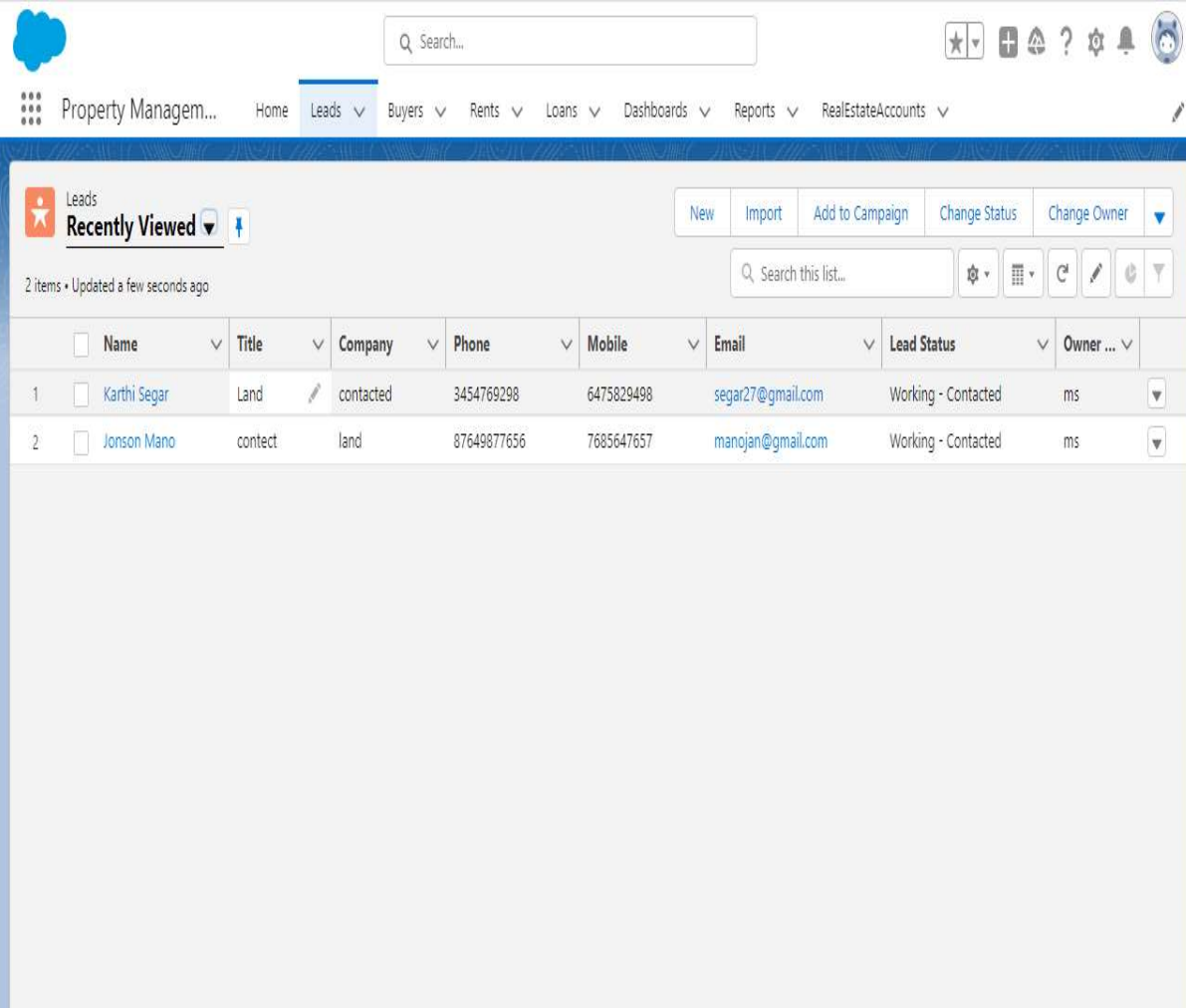
New Import Change Owner

Search this list...

<input type="checkbox"/> Loan Name	
1 <input type="checkbox"/> Bus	▾
2 <input type="checkbox"/> Ambulance	▾
3 <input type="checkbox"/> Boat	▾
4 <input type="checkbox"/> Auto Ricksha	▾
5 <input type="checkbox"/> Van	▾
6 <input type="checkbox"/> Jeep	▾
7 <input type="checkbox"/> Scooty	▾
8 <input type="checkbox"/> Truck	▾
9 <input type="checkbox"/> Thinks	▾
10 <input type="checkbox"/> Taxi	▾
11 <input type="checkbox"/> TVS	▾
12 <input type="checkbox"/> Tempoes	▾
13 <input type="checkbox"/> cars	▾
14 <input type="checkbox"/> Bikes	▾

Screenshot 5: Leads tray

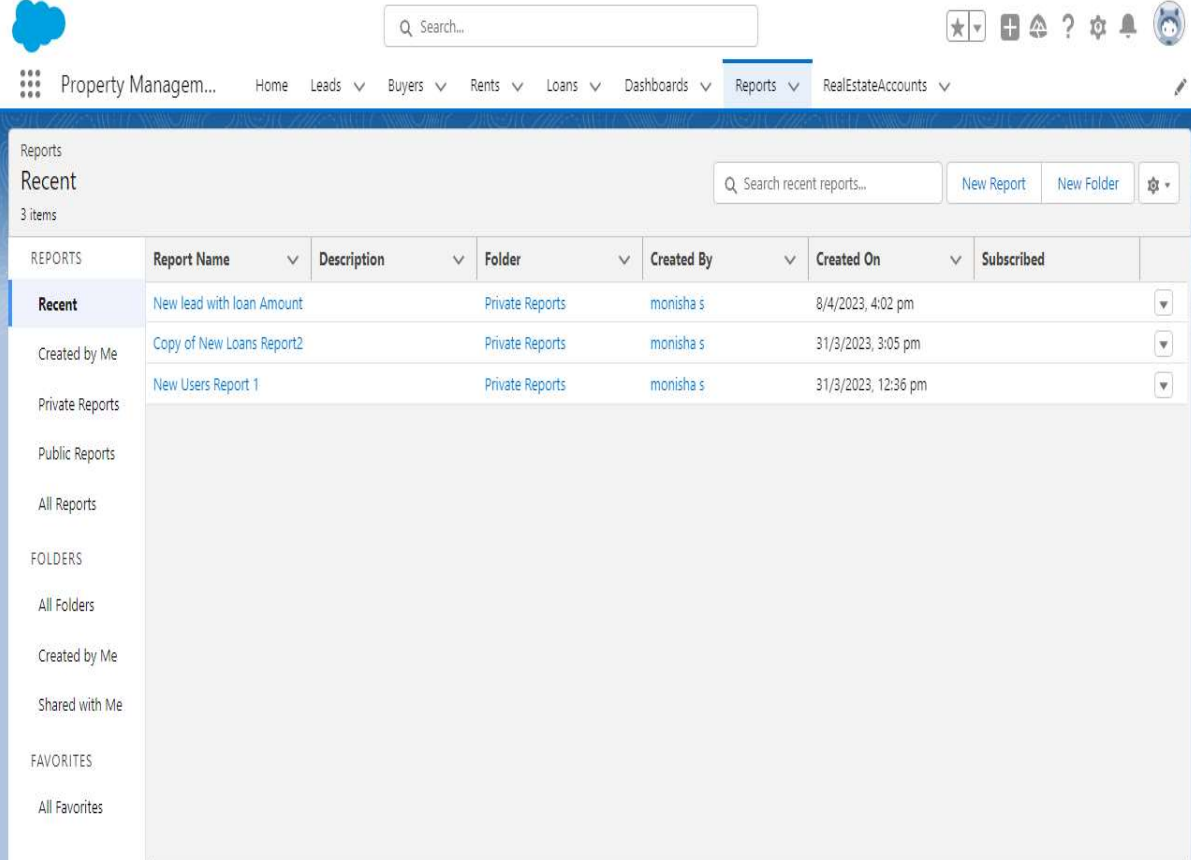
To maintain the details about leads and other related information need to click on the leads tray button and use new for adding new entry,



The screenshot displays the 'Leads' section of a software application. At the top, there is a navigation bar with a search box and various icons. Below this, a menu bar includes 'Property Managem...', 'Home', 'Leads', 'Buyers', 'Rents', 'Loans', 'Dashboards', 'Reports', and 'RealEstateAccounts'. The 'Leads' section is active, showing a 'Recently Viewed' tab. Below the tab, there are buttons for 'New', 'Import', 'Add to Campaign', 'Change Status', and 'Change Owner'. A search box labeled 'Search this list...' is also present. The main area contains a table with 2 items, updated a few seconds ago. The table has columns for Name, Title, Company, Phone, Mobile, Email, Lead Status, and Owner. The data rows show two leads: Karthi Segar and Jonson Mano.

	Name	Title	Company	Phone	Mobile	Email	Lead Status	Owner ...
1	Karthi Segar	Land	contacted	3454769298	6475829498	segar27@gmail.com	Working - Contacted	ms
2	Jonson Mano	contect	land	87649877656	7685647657	manojan@gmail.com	Working - Contacted	ms

Screenshot 6 : Generating Auto Report



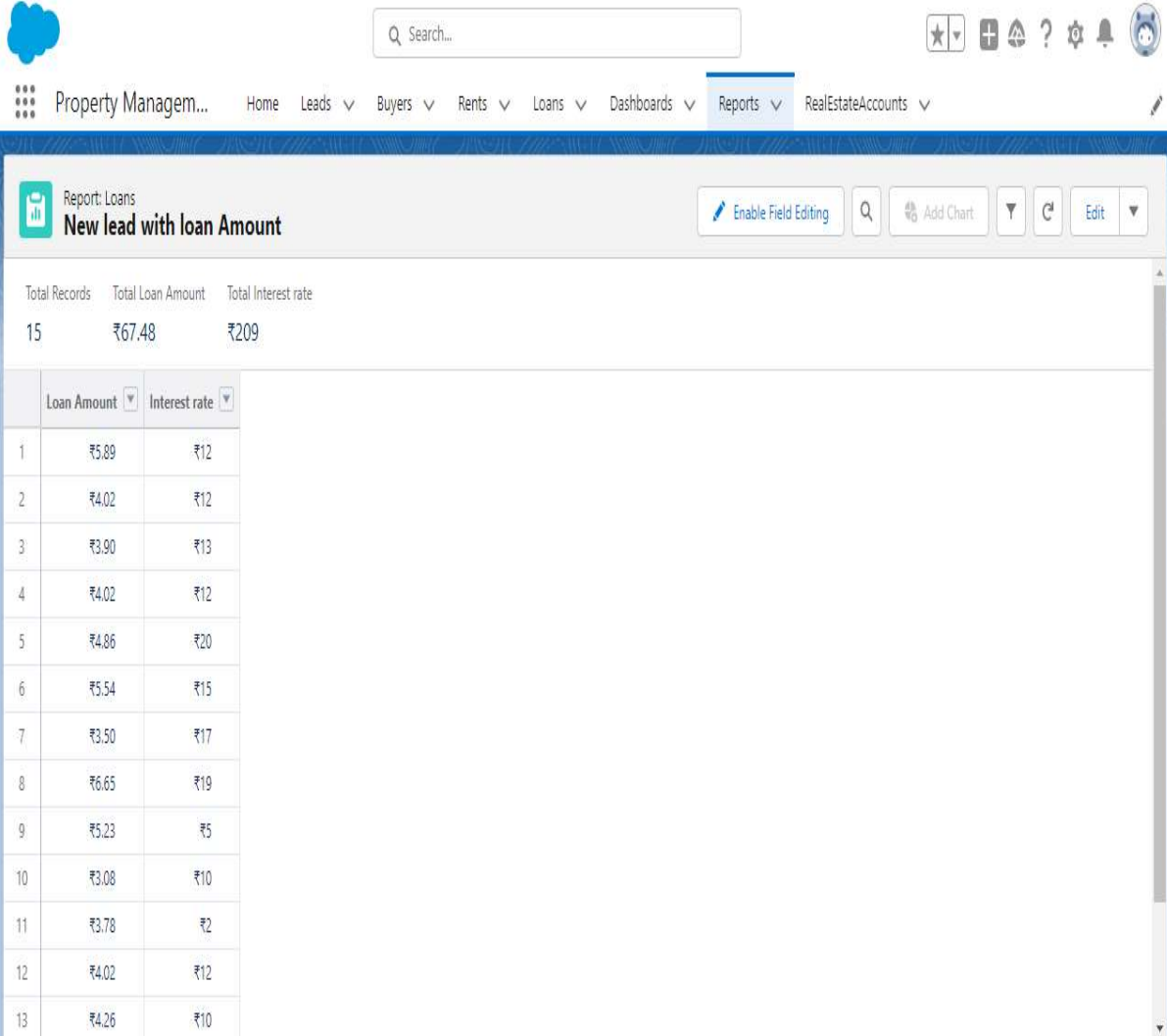
The screenshot displays the 'Reports' section of a Property Management application. The interface includes a top navigation bar with a search bar and various icons. Below the navigation bar, the 'Reports' section is active, showing a list of recent reports. The left sidebar contains a tree view with categories like 'REPORTS', 'FOLDERS', and 'FAVORITES'. The main content area shows a table of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The 'Recent' report is highlighted.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New lead with loan Amount		Private Reports	monisha s	8/4/2023, 4:02 pm	
Created by Me	Copy of New Loans Report2		Private Reports	monisha s	31/3/2023, 3:05 pm	
Private Reports	New Users Report 1		Private Reports	monisha s	31/3/2023, 12:36 pm	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

For generating new report click on the new and provide essential details so that this will work in background.

Screenshot 6.1 : Example for generating report of " New Lead with Loan amount"

The details are exceled in the tabular form for easy understanding and can be review quickly by the management team also can be trace the maximum amount, total granted amount...



Report: Loans
New lead with loan Amount

Enable Field Editing | Add Chart | Edit

Total Records: 15 | Total Loan Amount: ₹67.48 | Total Interest rate: ₹209

	Loan Amount	Interest rate
1	₹5.89	₹12
2	₹4.02	₹12
3	₹3.90	₹13
4	₹4.02	₹12
5	₹4.86	₹20
6	₹5.54	₹15
7	₹3.50	₹17
8	₹6.65	₹19
9	₹5.23	₹5
10	₹3.08	₹10
11	₹3.78	₹2
12	₹4.02	₹12
13	₹4.26	₹10

Screenshot 6.2 : Making chart option in report

we can avail different varieties of chart to represent the excel tabled in report section

Report: Loans
Copy of New Loans Report2

Total Records
15

	Loan: Loan Name
1	Auto Ricksha
2	Truck
3	cars
4	Bikes
5	Van
6	TVS
7	Scooty
8	Jeep
9	Ambulance
10	Loan
11	Boat
12	Tempoes
13	Thinks

Screenshot 7 : Generating the information in defined presentation.

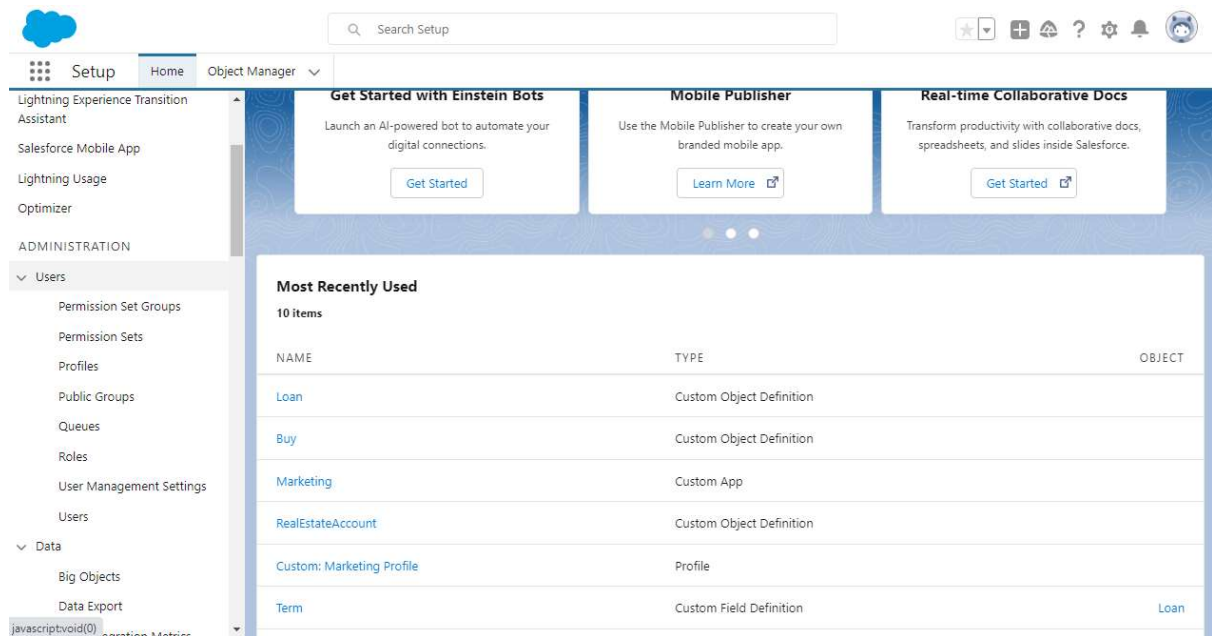
Dashboard tray will allow us to present multiple reports in combined manner by representing in a pictorial way.

Dashboards
Recent
2 items

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	New lead with Loan Report		Loan amount	monisha s	8/4/2023, 4:03 pm	
Created by Me	CRM		lead	monisha s	31/3/2023, 3:14 pm	

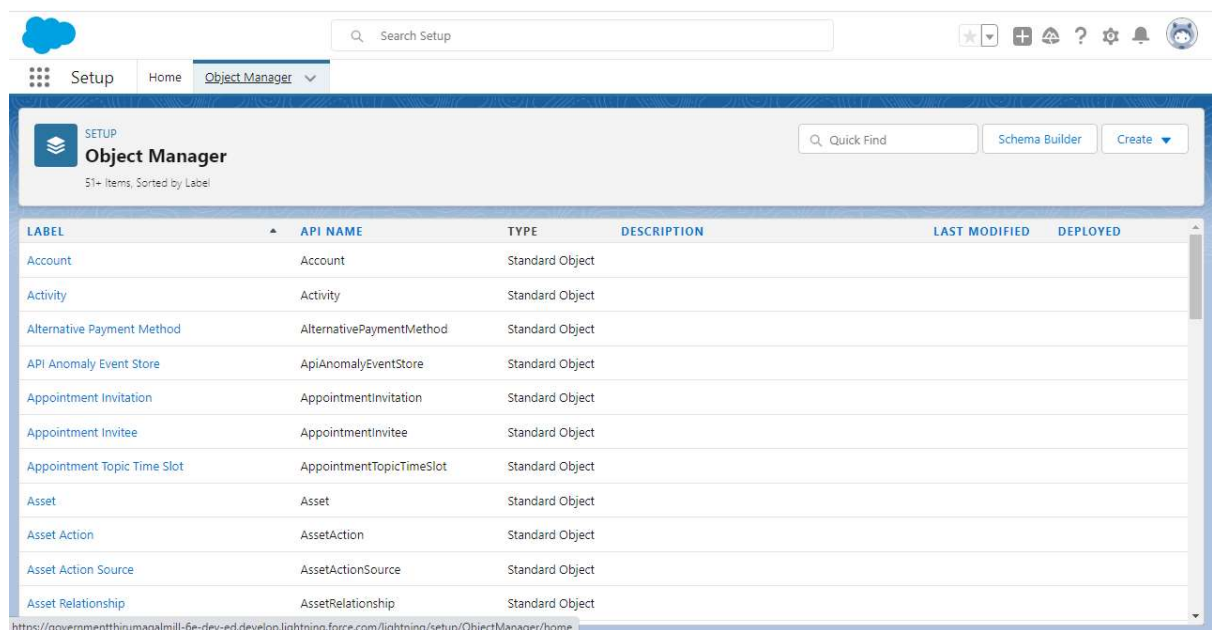
Screenshot 8: Project Administration

Managing project by maintaining the right permission, user management, handling the data's, Profiles groups, Roles is possible under setup page.



Screenshot 9 : Object manager

Object manager is available under setup, which is the key tab for build the project by using custom objects, fields, tabs



4.Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/monis277>

Team Members - <https://trailblazer.me/id/monis277>

Team Members - <https://trailblazer.me/id/monis277>

Team Members - <https://trailblazer.me/id/monis277>

Team Members - <https://trailblazer.me/id/monis277>

5.ADVANTAGES & DISADVANTAGES

I. ADVANTAGES

Salesforce Cons

- Better Time Management. Time management is a huge benefit of Salesforce and one of the best ways to allow a business to grow and thrive
- Ultimate Accessibility
- Increased Revenue
- Greater Customer Satisfaction
- Simple Account Planning
- Trusted Reporting
- Improved Team Collaboration

Advantage Of Salesforce Platform

It's the secret sauce that enables seamless integration between your sales and service organizations with no complicated, costly deployments. With the Salesforce Platform Advantage everyone in your sales and service organizations has a 360-degree view of every customer and their interactions with your company.

Advantage Of Salesforce CRM

Data organized and presented by a CRM platform leads to a better understanding of customers. This leads to better messaging and outreach, much of which can be done with automation, which helps you offer better, more efficient customer service.

II. DISADVANTAGES

Salesforce Cons

- Expensive.
- You have to pay for add-ons to get the most out of the software.
- Configuration and setup is complex and time-consuming.
- Cluttered interface makes navigation and simple tasks unnecessarily complex.
- The learning curve never seems to end.
- Customer support has a poor reputation.

APPLICATIONS

Salesforce is used for streamlining sales, service, and marketing activities via industry-specific products and seamless software integration. It offers solutions for various needs such as Sales Cloud, Service Cloud, Marketing Cloud, Community Cloud, Field Services, CPQ and Billing etc.

Salesforce's ecosystem hosts a number of various cloud platforms that allow you to interact with different data and service your customers in multiple capacities.

But despite numerous products, customer relationship management (CRM) is still the lifeblood of Salesforce's entire model, optimized for different business niches in Salesforce Clouds.

CONCLUSION

It has been observed that the Salesforce CRM is the most beneficial tool these days. Cloud computing is the backbone of today's computing. It needs to develop good customer relationship for more profit in the real estate business.

FUTURE SCOPE

As the demand for any Salesforce job role is high, a certification equips you with specialized Salesforce requirements. The right Salesforce training props you ahead in a niche area where the scope for career growth and salary is sky-high.