

GOVERNMENT ARTS COLLEGE FOR WOMEN

SALEM-8

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PROPERTY MANAGEMENT

APPLICATION USING SALESFORCE

1. INTRODUCTION

1.1 OVERVIEW

Salesforce Property Management enables the managers to keep track of crucial data about financial and households properties incorporating associated cash flow, Primary tenants, and occupancy rates.

A Property Management System (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties. PMS is also used in manufacturing industries, local government and manufacturing.

1.2 PURPOSE

Property Management assist owners in creating budgets, Advertise rental properties, Qualify tenants and collect rent. They also company with the local landlord and real estate board laws and maintain the property.

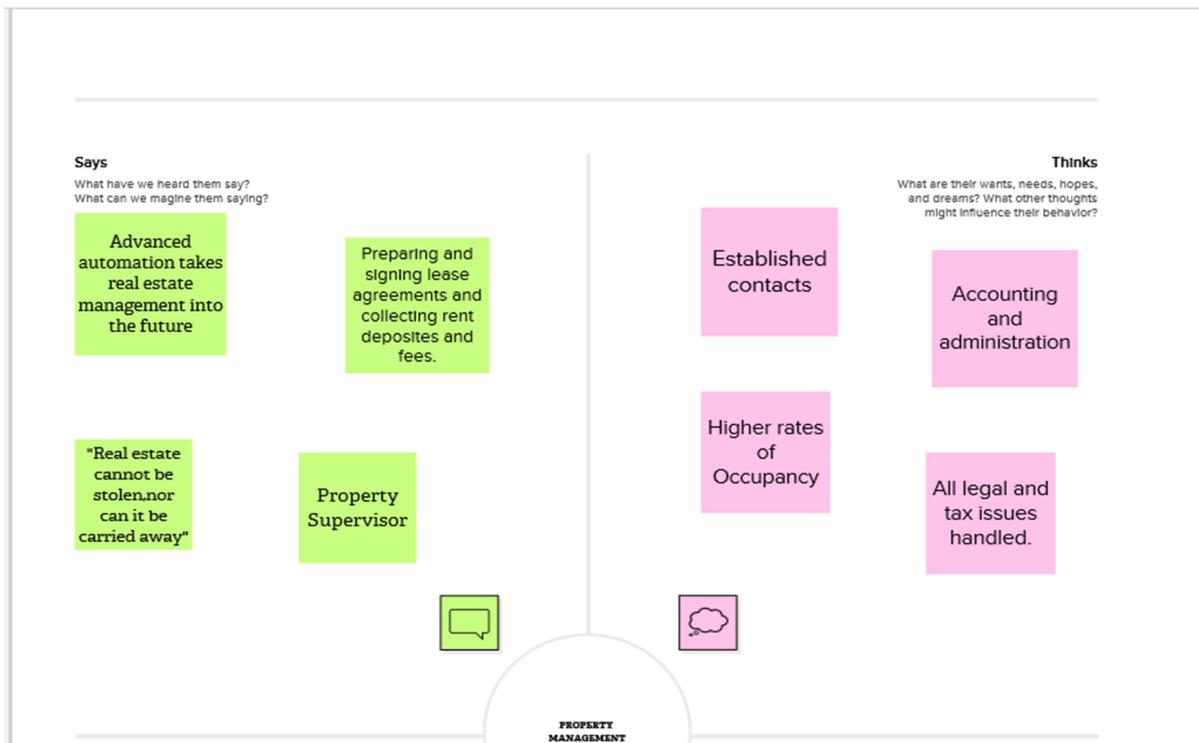
1.3 OBJECTIVE

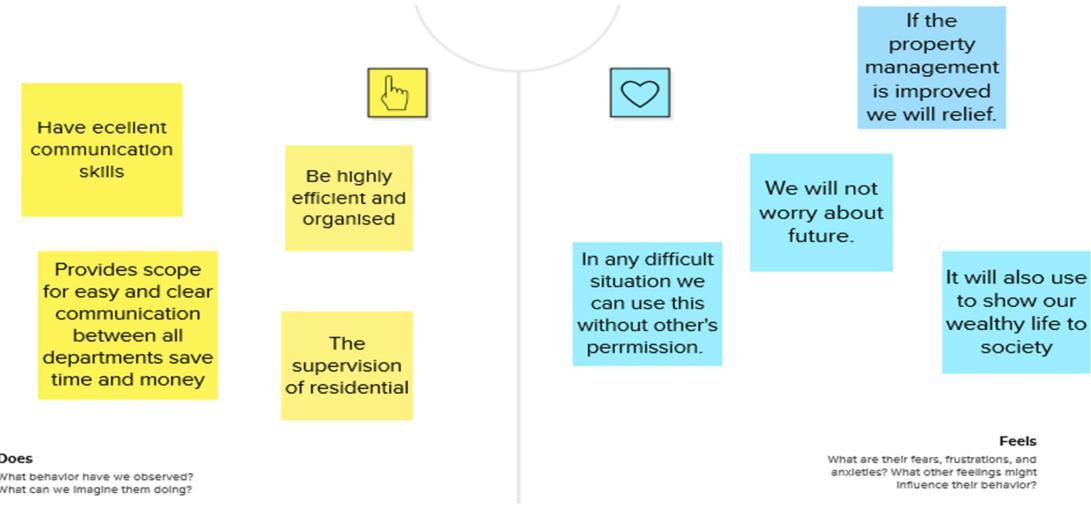
To carry on the business of providing all type of facilities management and maintenance of all kinds and structure such as commercial & residential buildings and Complexes, Theaters, Cinema halls, Auditoriums, Sports Complexes, Stadiums and factories and Undertake activities regarding the same.

2. PROBLEM DEFINITION & DESIGN

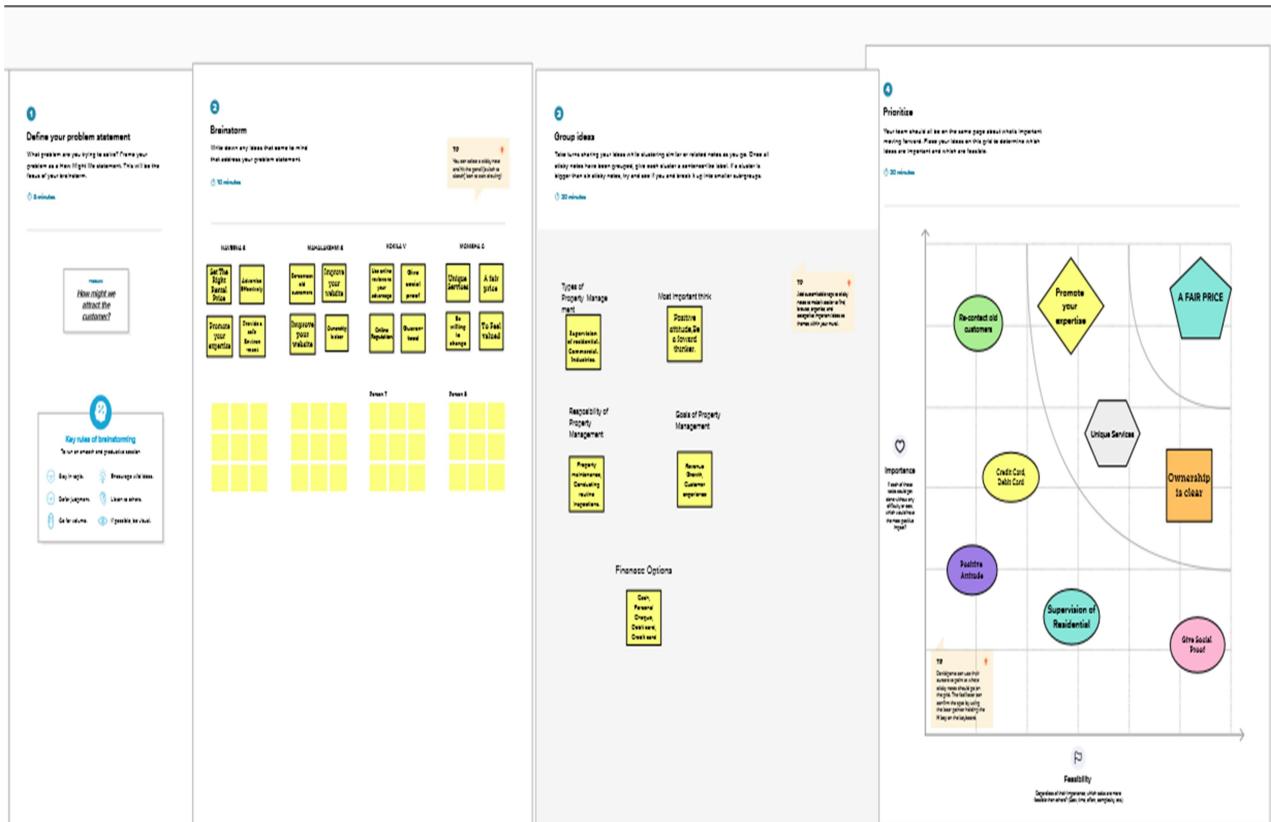
THINKING

2.1 EMPATHY MAP





2.2 IDENTATION & BRAINSTROMING MAP SCREENSHOT



3.RESULT

3.1 DATA MODEL:

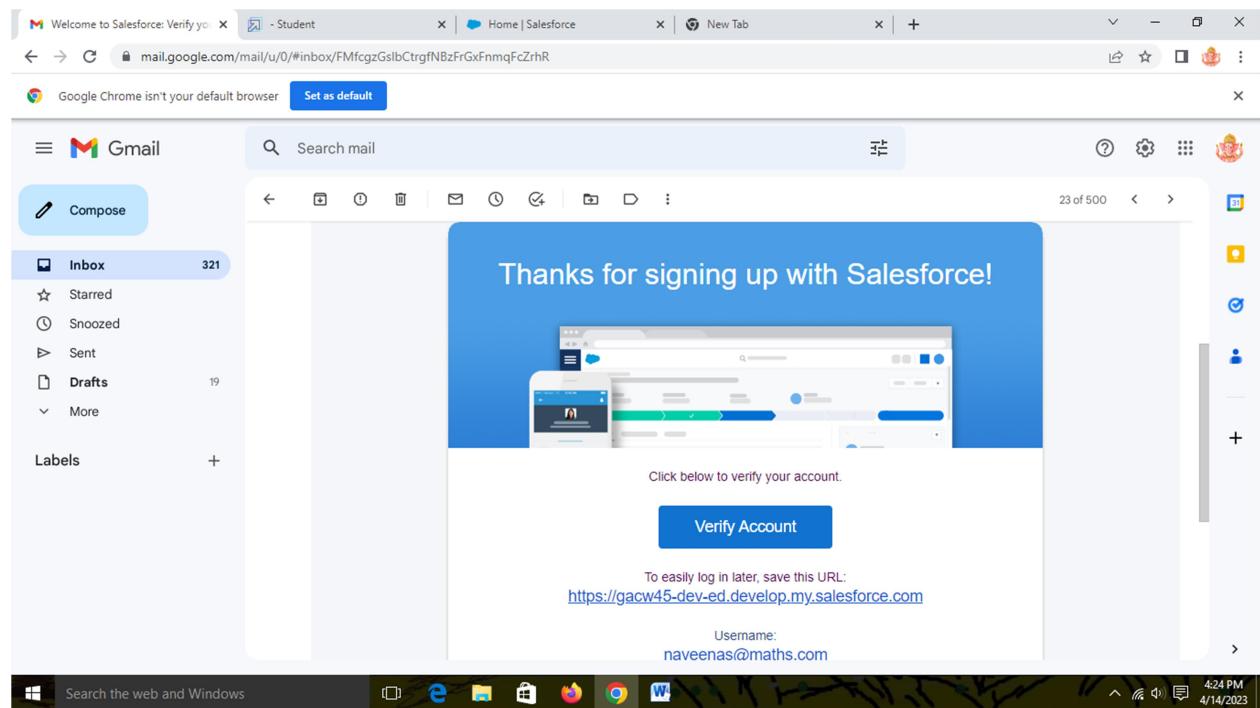
Object Name	Fields in Object	
	Field label	Data type
Lead	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
Buy	Property Type	Text
	Discount	Percentage
	State	Picklist
	City	Picklist
Rent	Rent	Autonumber
	Rental City	Text
	BHK type	Picklist
	Field label	Data type
	Loan Id	Autonumber
	Interest Rate	Currency

Loan	Term	Number
	Annual Loan	Number
	Total Loan Instalments	Number
	Loan Repayment	Number
	Loan Amount	Formula

3.2 ACTIVITY & SCREENSHOT

Mile Stone: 1

Create Developer Account :



Mile Stone: 2

Object:

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

Create Object:

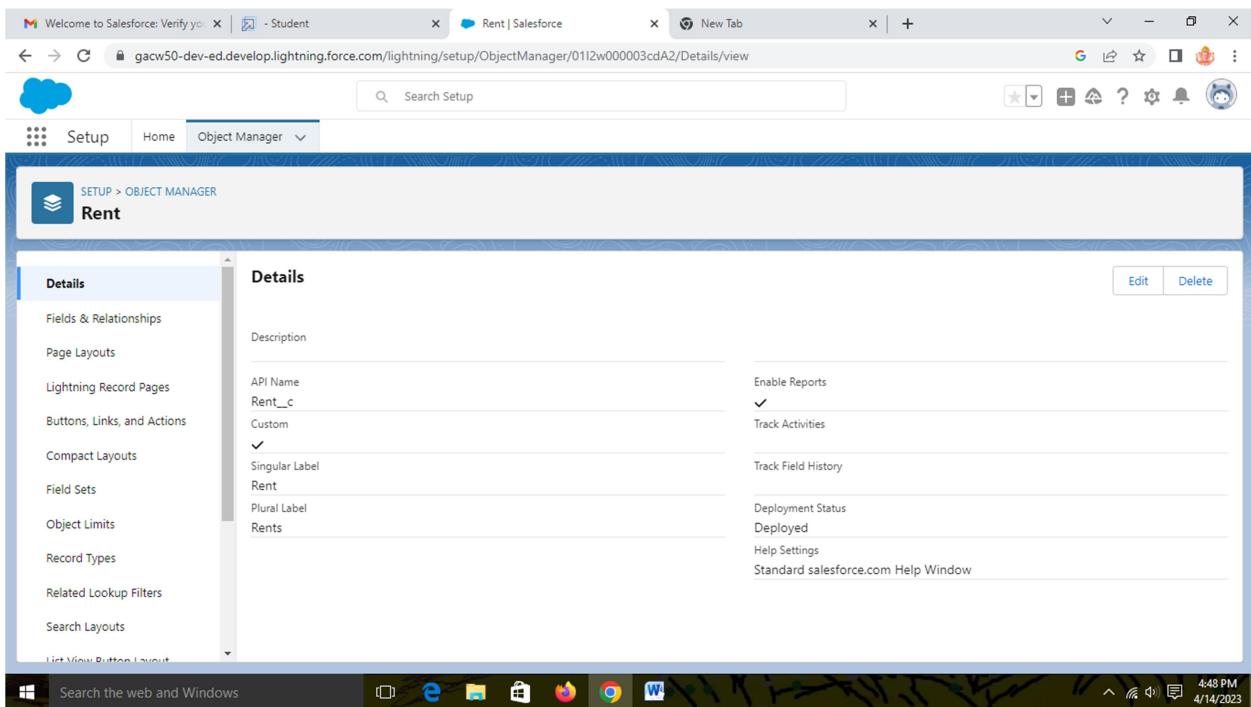
Create Buy Object :

The screenshot shows the Salesforce Setup interface with the following details:

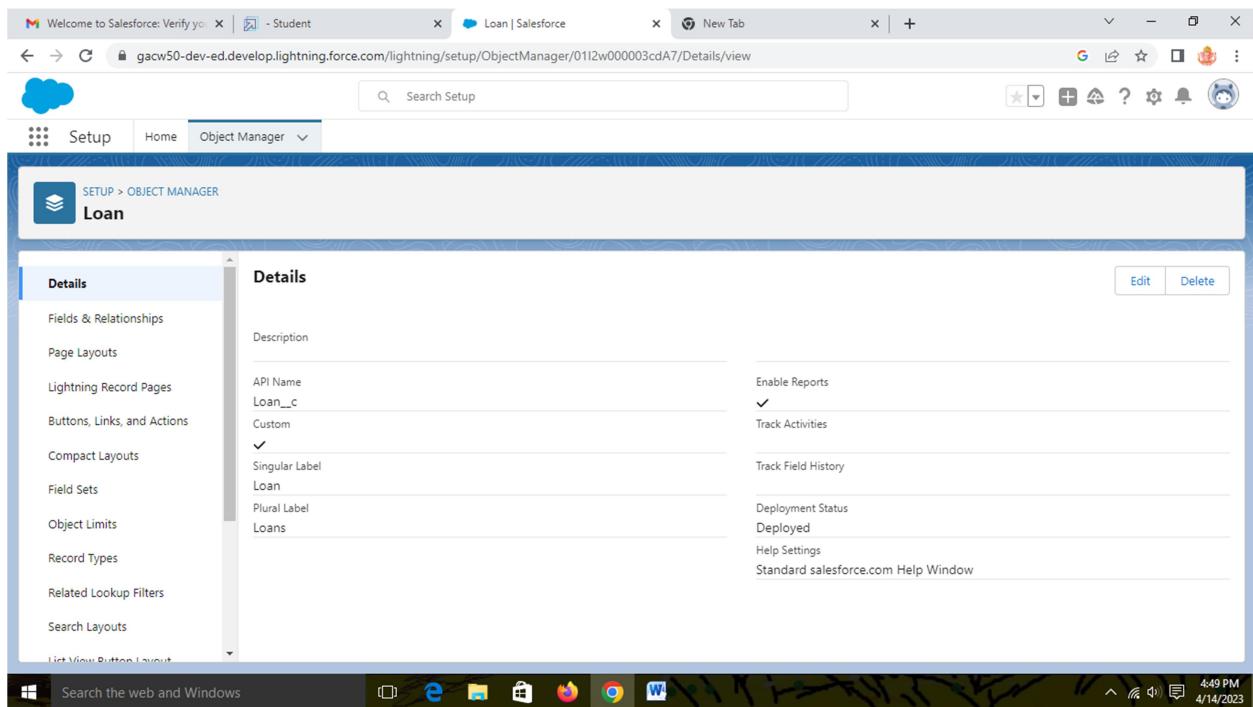
- Setup Tab:** The user is in the "Object Manager" section under "SETUP > OBJECT MANAGER".
- Object Name:** The API Name is set to "Buy__c".
- Description:** The object is described as "Custom" (checked) and has a singular label "Buy" and a plural label "Buyers".
- Enable Reports:** This checkbox is checked.
- Track Activities:** This checkbox is checked.
- Deployment Status:** The status is "Deployed".
- Help Settings:** The help window is set to "Standard salesforce.com Help Window".

The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

Create Rent Object:



Create Loan Object:



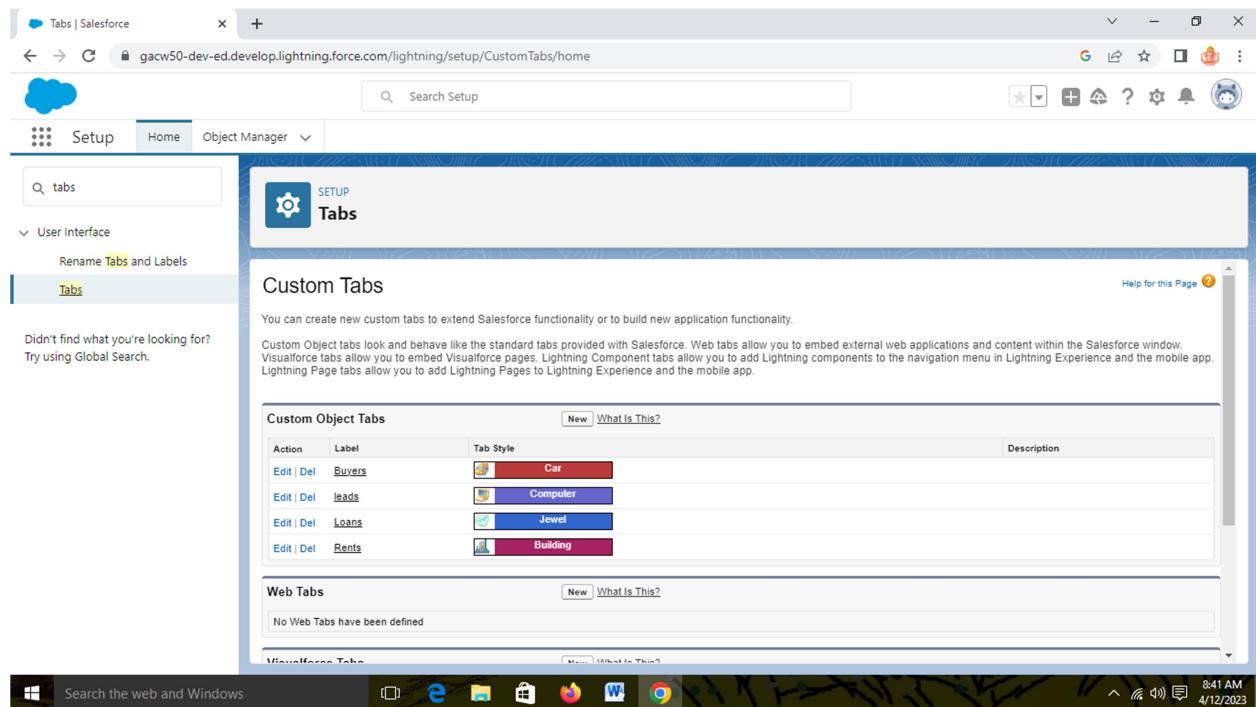
From the setup page, click on object manager and click on create and click on custom object. Enter the label name, plural label name, click on Allow reports, Allow search and Save.

Mile Stine: 3

Custom object 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 Custom object Tab:



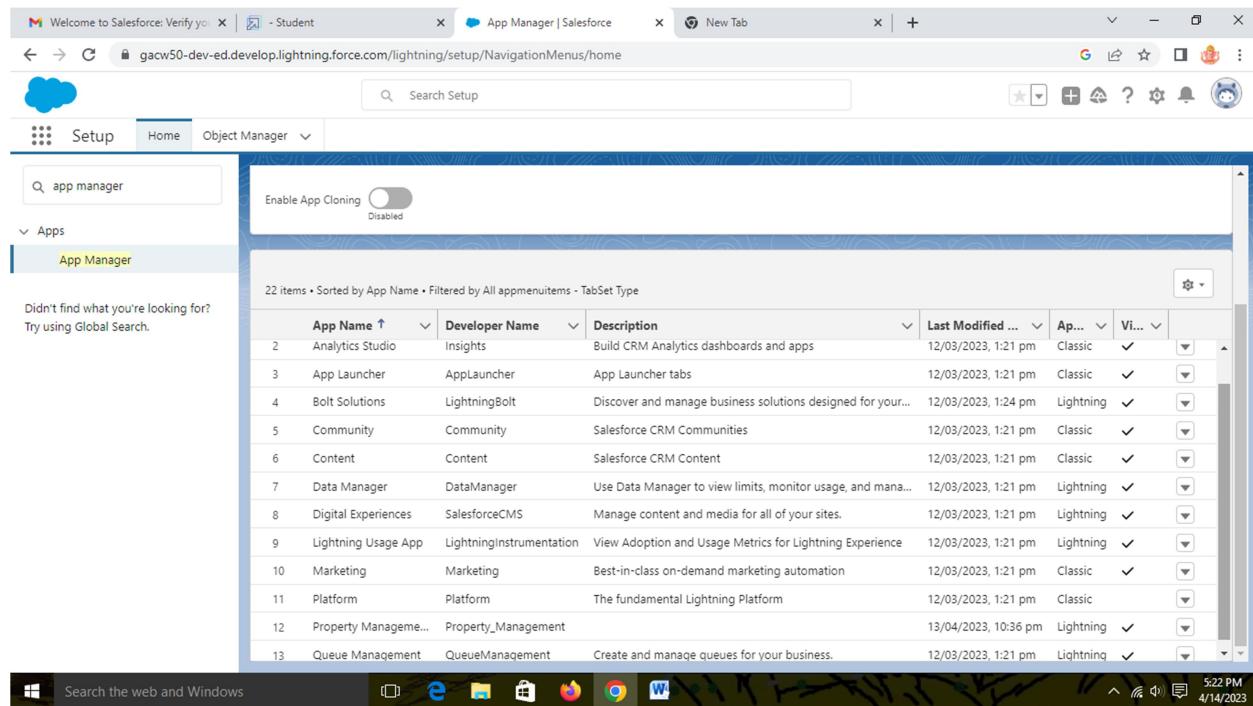
Go to the setup page and click on tabs and select tabs, click new select the object and select the tab style **Next and Save.**

Mile Stone: 4

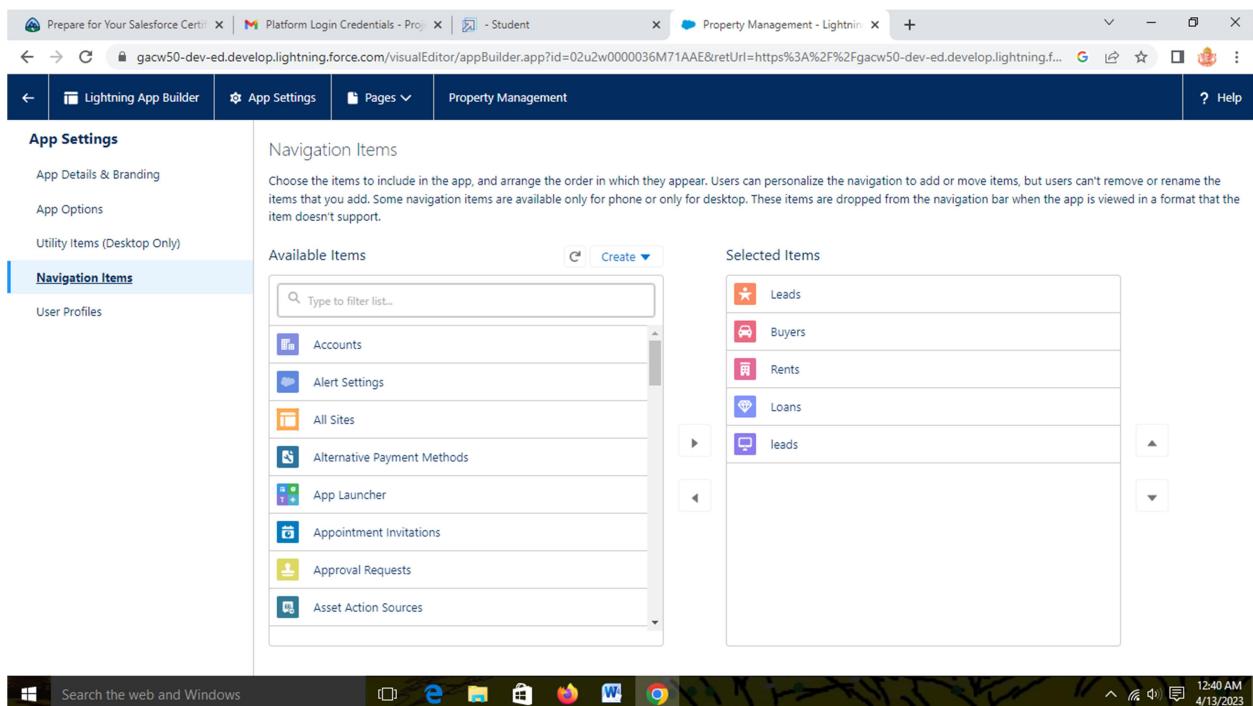
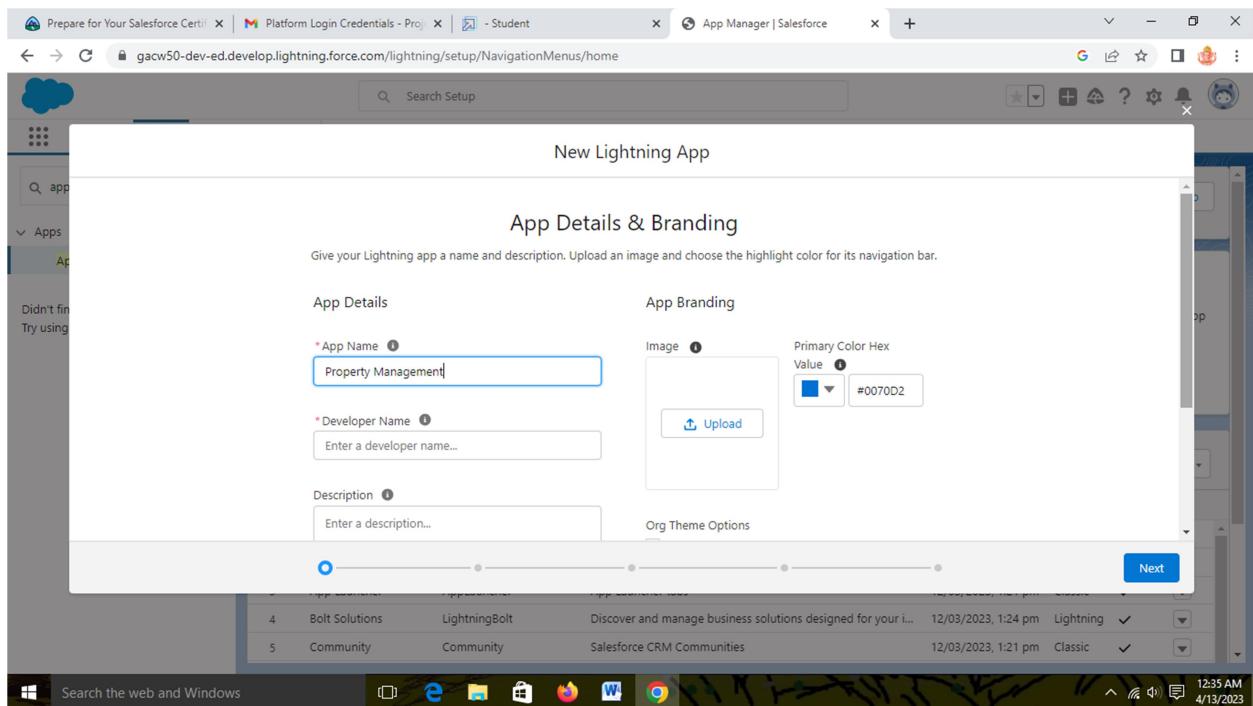
Lightning App:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

Create the Lightning App:



Go setup page search app manager and click new lightning app and Fill the app name as Property Management in app details and branding and Next.



Add Navigation Items and Add User Profile and Next and Save and Finish.

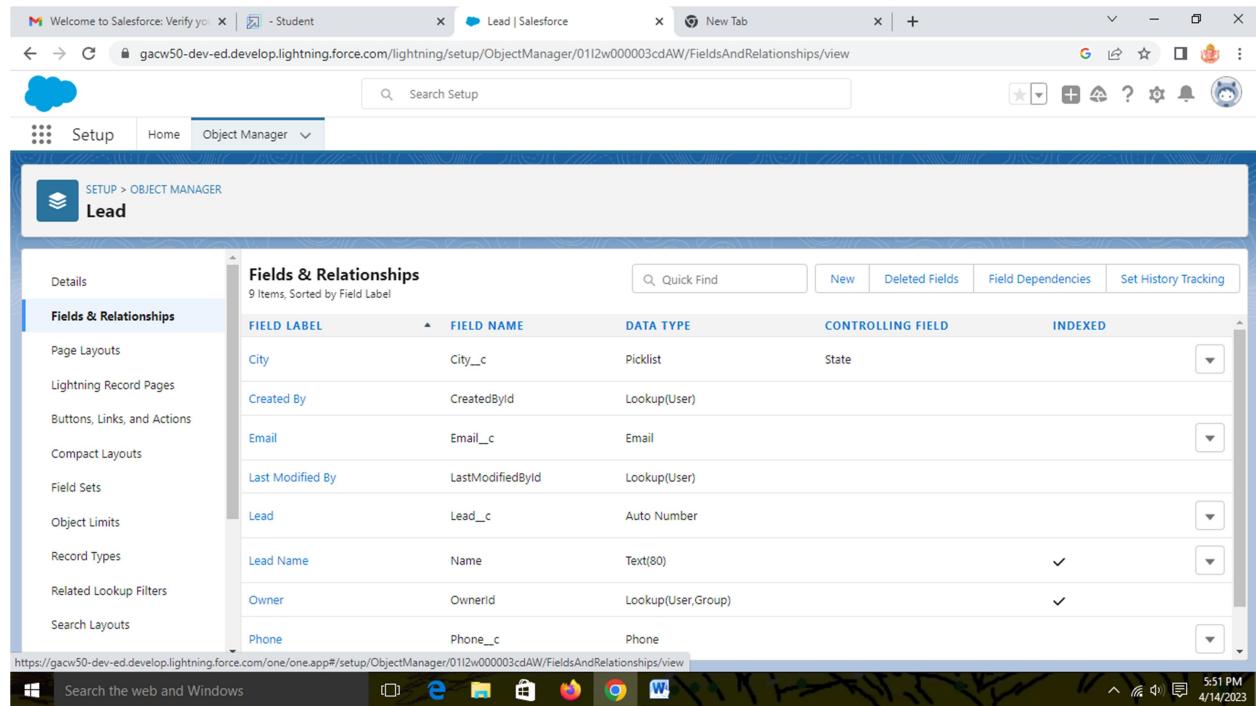
Mile Stone: 5

Field & Relationship:

When we talk about Sales force, Field represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simple and quicker.

Create Field & Relationship:

Create Field for Lead:



The screenshot shows the Salesforce Setup interface with the following details:

- Tab Bar: Welcome to Salesforce: Verify yo..., Student, Lead | Salesforce, New Tab.
- Header: Search Setup.
- Left Sidebar: Object Manager, Lead.
- Left Panel: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts.
- Main Content: Fields & Relationships table with 9 items, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Lead	Lead__c	Auto Number		
Lead Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
- Page Bottom: URL: https://gacw50-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01I2w000003cdAW/FieldsAndRelationships/view, Taskbar: Search the web and Windows, Taskbar icons: File, Home, Start, Task View, Edge, File Explorer, Task View, Firefox, Chrome, Word, 5:51 PM, 4/14/2023.

Click the gear icon and setup. Click object manager and select the lead. Select field & relationships and select new. Select the required field and fill the label name and click **Next and Save**.

Similarly create the object for Buy, Rent, Loan.

Create the remaining fields:

Lead, State, City, Email, Phone.

Create Field for Buy:

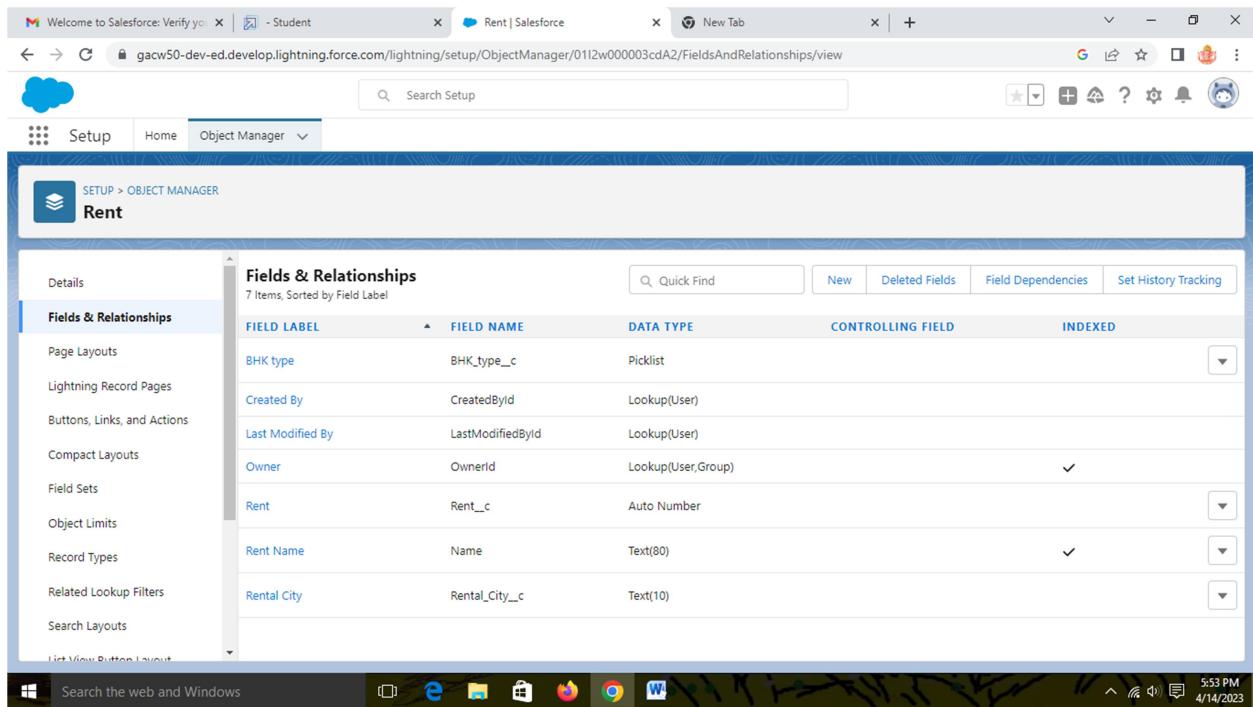
The screenshot shows the Salesforce Setup interface with the 'Buy' object selected. The left sidebar shows navigation options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main area displays a table titled 'Fields & Relationships' with 8 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy Name	Name	Text(80)		✓
City	City__c	Picklist	State	✗
Created By	CreatedById	Lookup(User)		✗
Discount	Discount__c	Percent(18, 0)		✗
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Property Type	Property_Type__c	Picklist		✗
State	State__c	Picklist		✗

Create the remaining fields:

Property Type, Discount, State, City, Annual Amount To Be Paid.

Create Field for Rent:



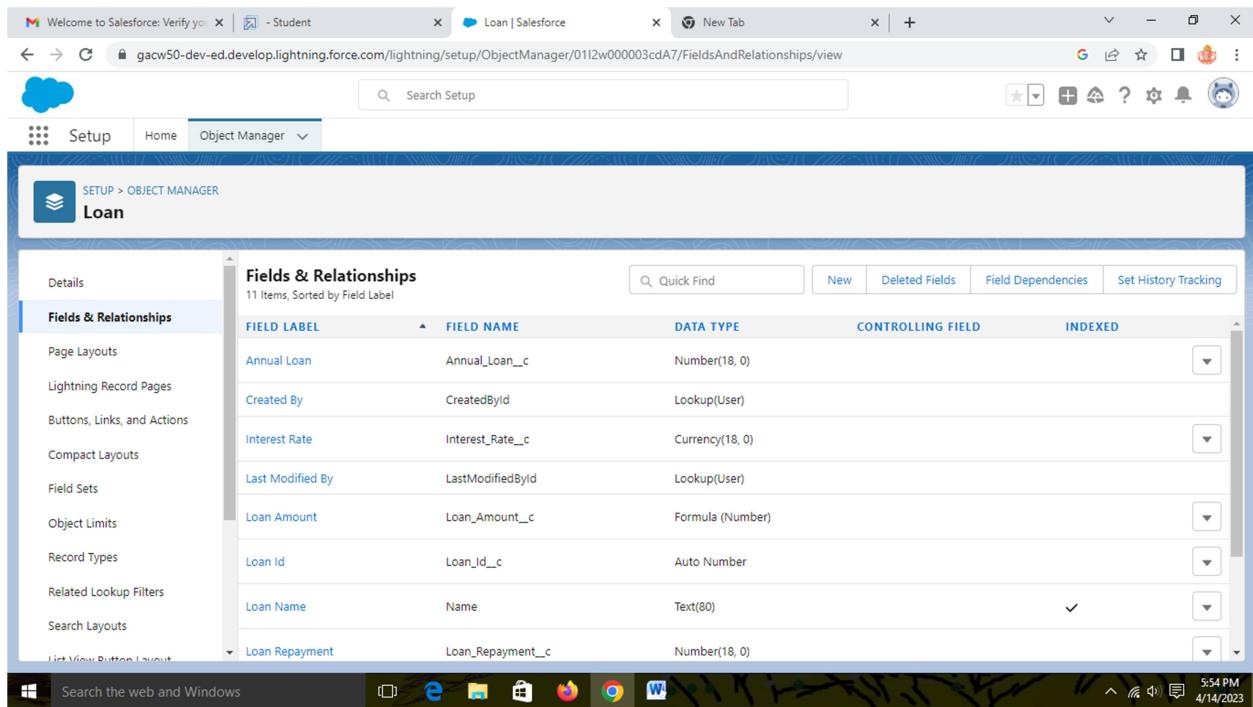
The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'Rent' object. The left sidebar lists various setup options like Details, Page Layouts, Lightning Record Pages, etc. The main area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK type	BHK_type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent	Rent__c	Auto Number		
Rent Name	Name	Text(80)		✓
Rental City	Rental_City__c	Text(10)		

Create the remaining fields:

Rent, Rental City, BHK type.

Create Field for Loan:



The screenshot shows the Salesforce Object Manager interface for the 'Loan' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with 11 items, sorted by Field Label. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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

Create the following fields:

Loan Id, Interest Rate, Term, Annual Loan, Total
Loan Instalments, Loan Repayment, Loan Amount .

Loan | Salesforce

gacw50-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003cdA7/FieldsAndRelationships/new

Cloud Search Setup Object Manager

Setup Home Object Manager

SETUP > OBJECT MANAGER

Loan

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

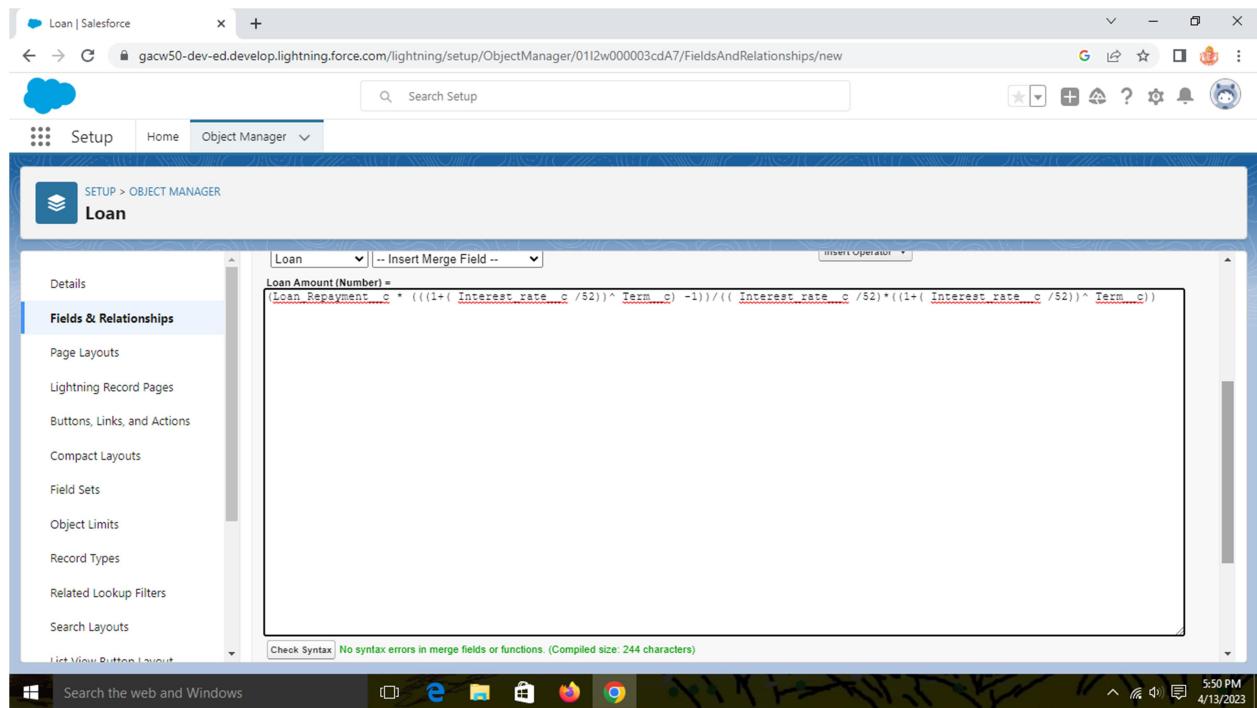
Search Layouts

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 244 characters)

Loan Amount (Number) =
$$(\text{Loan Repayment}_c * ((1 + (\text{Interest rate}_c / 52))^ \text{Term}_c - 1)) / ((\text{Interest rate}_c / 52) * ((1 + (\text{Interest rate}_c / 52))^ \text{Term}_c))$$

Insert Operator

5:50 PM 4/13/2023



Mile Stone: 6

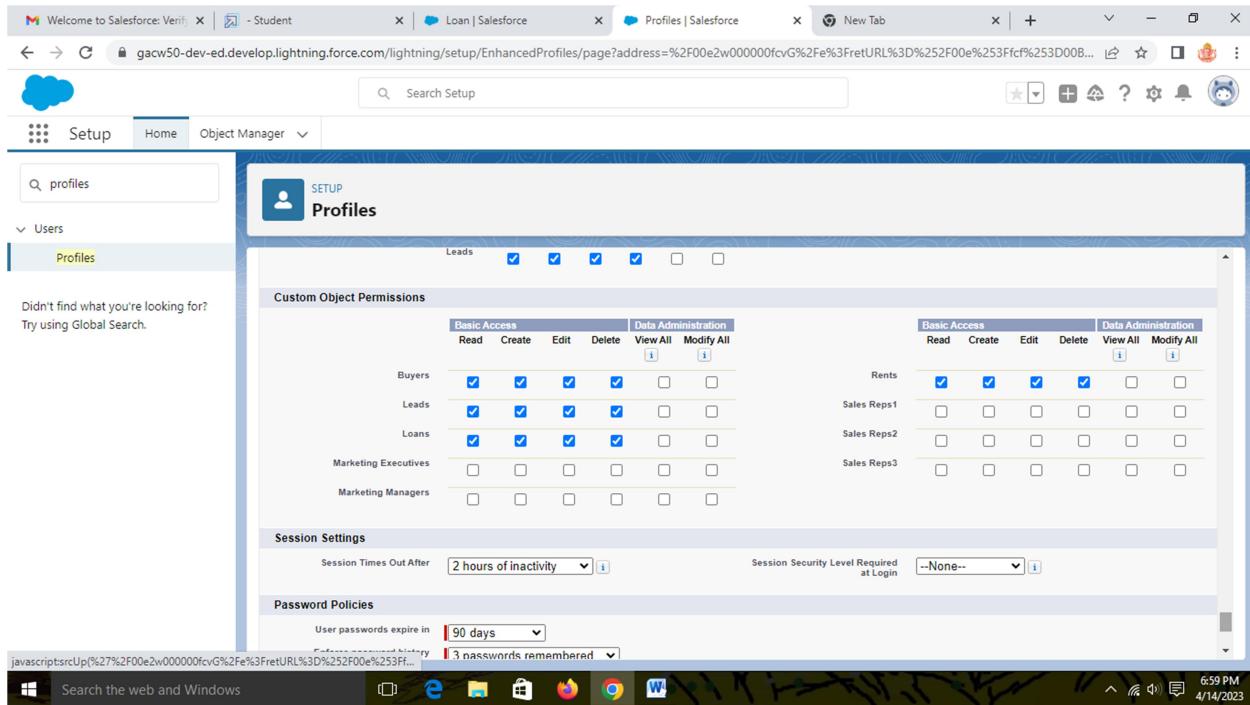
Profile:

- A Profile is a group/collection of settings and Permission that define what a user can do in salesforce.
- Profile controls “Object Permissions, Field permissions, User permissions, Tab settings, App Login hours & Login IP ranges.
- You can define profiles by the user’s job function. For example System Administrator, Developer, Sales Representative.

Create a Profile:

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Welcome to Salesforce: Verify, - Student, Loan | Salesforce, Profiles | Salesforce, New Tab.
- Top Bar:** Search Setup, various icons for navigation and help.
- Left Sidebar:** Cloud icon, Setup, Home, Object Manager, a search bar with "profiles", and a "Users" section with a "Profiles" tab selected. A message says "Didn't find what you're looking for? Try using Global Search."
- Central Content:** The "Profiles" page under the "SETUP" tab. It has a header with "Profiles", "All Profiles", "Edit | Delete | Create New View", and a "Help for this Page" link.
- Data Table:** A list of profiles with columns for Action, Profile Name, User License, and Custom. The table includes rows for:
 - Analytics Cloud Integration User (User License: Analytics Cloud Integration User, Custom: checked)
 - Analytics Cloud Security User (User License: Analytics Cloud Integration User, Custom: checked)
 - Authenticated Website (User License: Authenticated Website, Custom: checked)
 - Authenticated Website (User License: Authenticated Website, Custom: checked)
 - Chatter External User (User License: Chatter External, Custom: checked)
 - Chatter Free User (User License: Chatter Free, Custom: checked)
 - Chatter Moderator User (User License: Chatter Free, Custom: checked)
 - Contract Manager (User License: Salesforce, Custom: checked)
 - Cross Org Data Proxy User (User License: XOrg Proxy User, Custom: checked)
 - Custom: Marketing Profile (User License: Salesforce, Custom: checked)
 - Custom: Support Profile (User License: Salesforce, Custom: checked)
- Bottom:** Page navigation (1-25 of 43), a "Selected" dropdown, and a status bar showing "Page 1 of 2", "6:57 PM", "4/14/2023", and network connectivity icons.



- Go to setup and search & select profiles, clone desired enter profile name save. Click on new created profile then click edit.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar has a search bar and navigation links for 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows 'Custom Object Permissions' for several profiles. The profiles listed are Buyers, Leads, Loans, Marketing Executives, Marketing Managers, Rents, Sales Reps1, Sales Reps2, and Sales Reps3. For each profile, permissions are granted for Leads, Sales, and Rents. The 'Basic Access' section includes checkboxes for Read, Create, Edit, Delete, View All, and Modify All. The 'Session Settings' section shows 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to '--None--'. The 'Password Policies' section shows 'User passwords expire in' set to '90 days' and '3 passwords remembered'. The bottom of the screen shows the Windows taskbar with various icons and the date/time '4/14/2023 6:59 PM'.

- Scroll down Custom Object Permissions and Give view all access permissions and assign to parent profile.

Mile Stone: 7

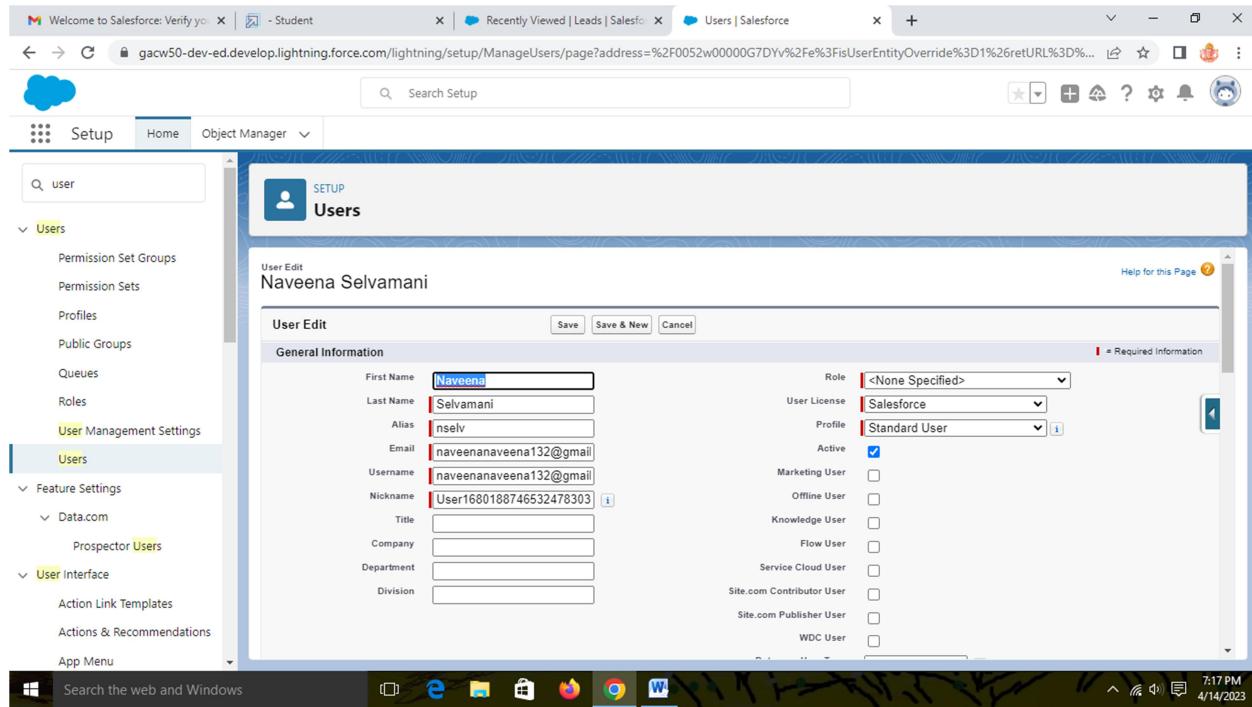
New User:

- A user is anyway who logs in to sales force. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.
- Every user in sales force has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Create User:

The screenshot shows the Salesforce Setup interface with the 'Users' page open. The left sidebar navigation bar includes 'Setup', 'Home', and 'Object Manager'. Under 'User Management Settings', 'Users' is selected. The main content area is titled 'Users' and shows a table of 'All Users'. The table columns are: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users with their details and roles. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00d2w00000rkcniexax.yrgaoctnfkg@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Selvamani_Naveena	nsely	naveenanaveena132@gmail.com		✓	Standard User
<input type="checkbox"/> Edit	Selvamani_S NAVEEENA	SSelv	naveena@maths.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000rkcniexax.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2w00000rkcniexax.com		✓	Analytics Cloud Security User



From the setup → type and select users , click new user. Fill the fields → (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.

Mile stone: 8

Permission Set:

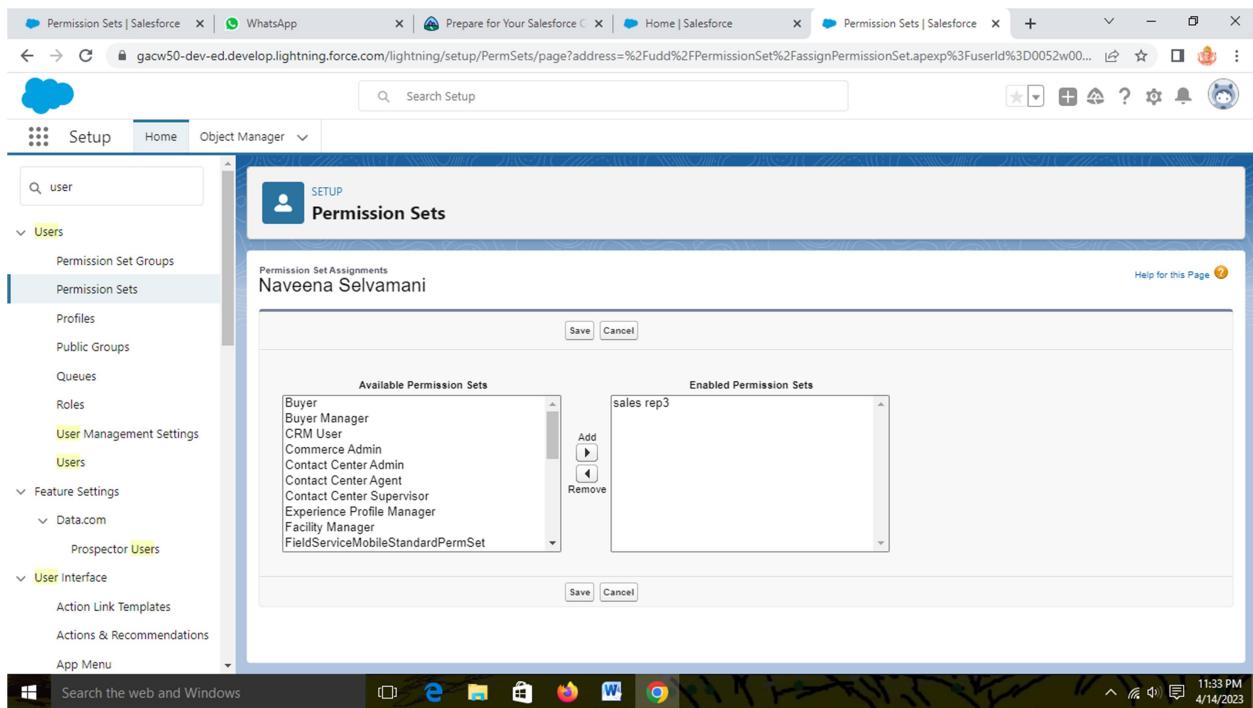
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend user's functional access without changing their profiles. Users can have only one profile but, depending on the Sales force edition, they can have multiple permission sets.

Create the Permission Sets:

The screenshot shows the Salesforce 'Permission Sets' page. The URL is <https://gacw50-dev-ed.lightning.force.com/lightning/setup/PermSets/home>. The page title is 'Permission Sets'. On the left, there's a sidebar with 'permission' search, 'Users' section (Permission Set Groups, Permission Sets selected), 'Custom Code' section (Custom Permissions), and a note about Global Search. The main content area displays a table of permission sets:

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer_Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager	Salesforce	
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager

At the bottom, there are navigation links for 'New', 'Edit', 'Delete', and 'Create New View'. A footer bar includes the Windows taskbar with icons for File, Start, Task View, Edge, File Explorer, Taskbar, and Wi-Fi, along with system status like battery level and date/time (7:30 PM, 4/14/2023).



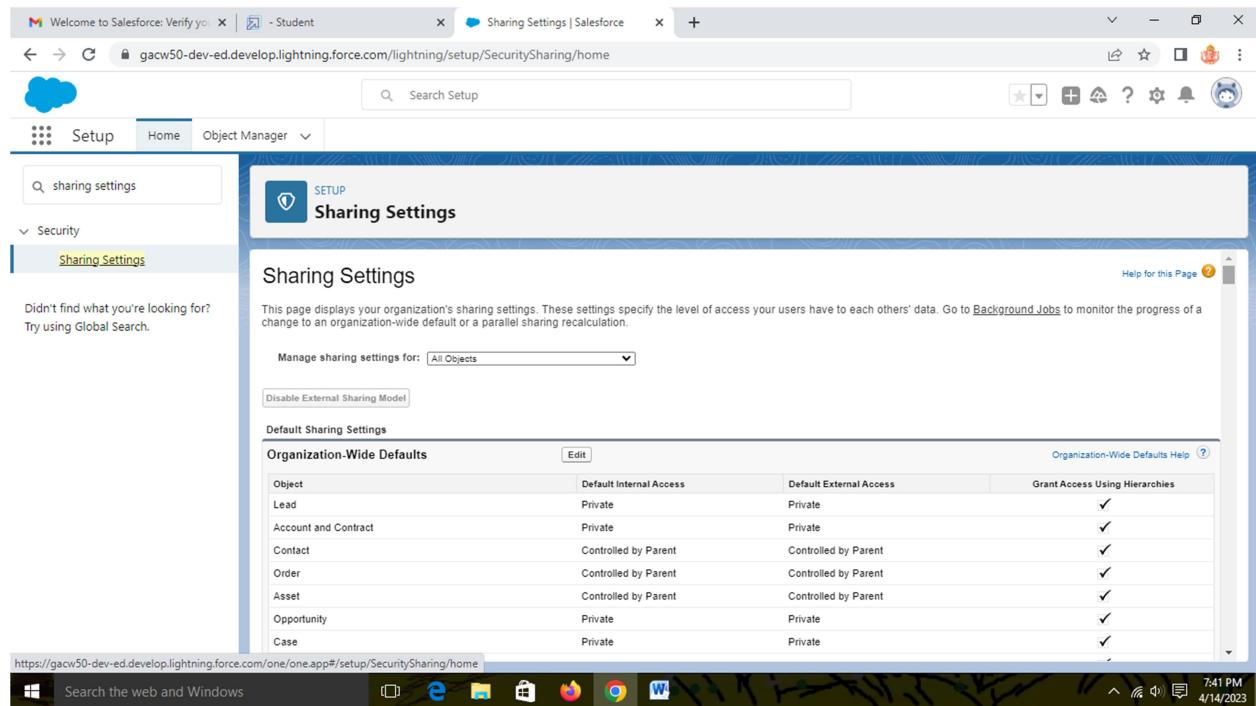
Go to setup → type “permission sets” → select permission sets → new → click manage assignment → add assignment → select users → sales Rep3 → save.

Mile Stone: 9

Setup for OWD:

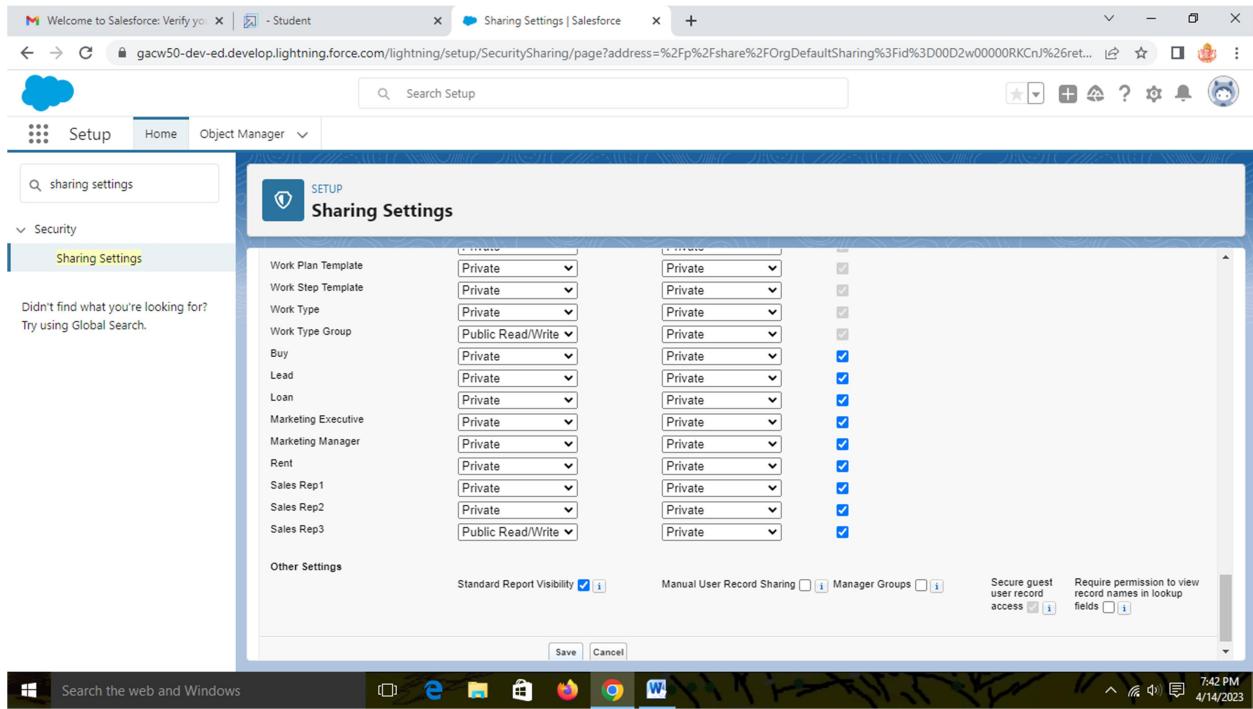
Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later.

Create OWD Setting:



The screenshot shows the Salesforce Sharing Settings page. At the top, there's a search bar and a 'Manage sharing settings for:' dropdown set to 'All Objects'. Below this is a 'Default Sharing Settings' section with a 'Organization-Wide Defaults' table. The table lists various objects and their sharing settings:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account and Contract	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓



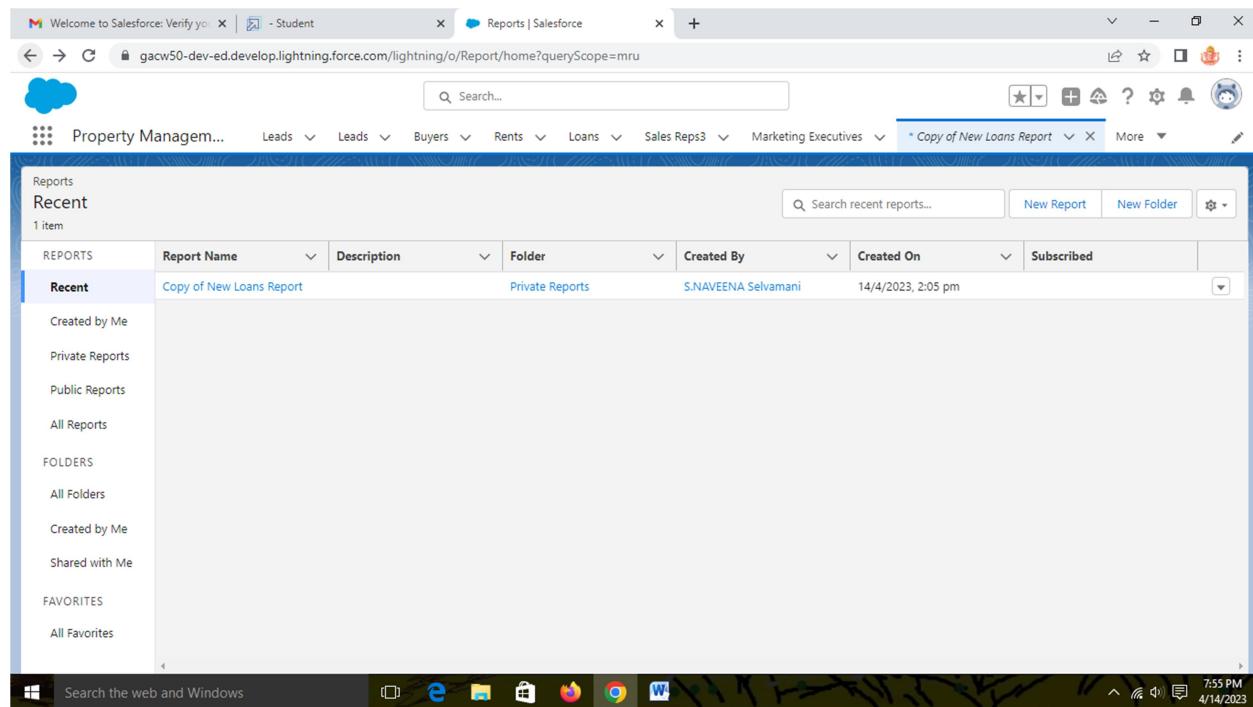
Go setup find sharing setting → click edit in OWD area → select the default access to give everyone.

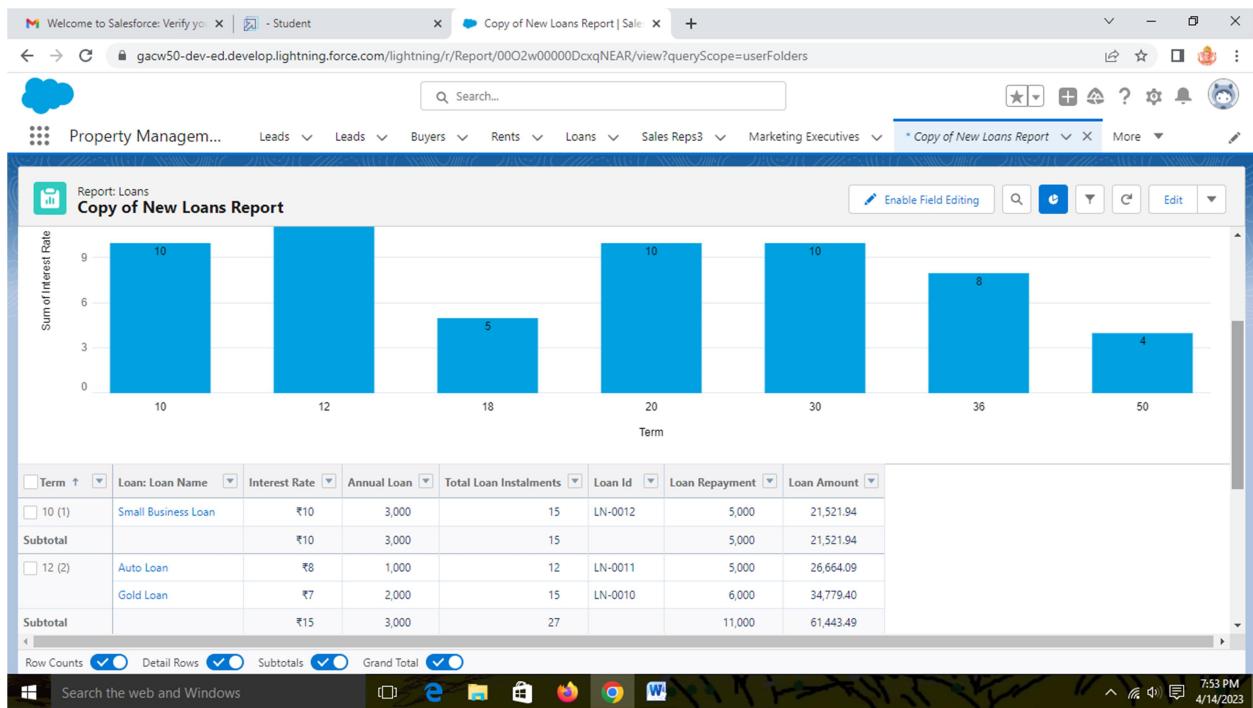
Mile Stone: 10

Report:

Report gives you access to your sales force data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading , and sharing reports, review these reporting basics.

Create Report:





Go to app → click reports → click new report →
 Select the report type from category → Click on start report → Customize report → Save.

Mile Stone: 11

Dashboards:

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you'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 dashboards basics.

Create Dashboards:

The screenshot shows the Salesforce Dashboards page. The top navigation bar includes links for Marketing, Home, Chatter, Campaigns, Leads, Contacts, Opportunities, Reports, Dashboards (which is currently selected), Buyers, Rents, Loans, and More. A search bar at the top right says "Search...". Below the navigation is a table titled "Dashboards Recent" with one item listed:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Loan Amount Transaction		Private Dashboards	S.NAVEENA Selvamani	14/4/2023, 2:10 pm	

On the left, there's a sidebar with categories: Created by Me, Private Dashboards, All Dashboards, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. The bottom of the screen shows the Windows taskbar with various icons and the date/time: 8:05 PM 4/14/2023.

The screenshot shows the "Loan Amount Transaction" dashboard. The top navigation bar is identical to the previous screenshot. The dashboard title is "Loan Amount Transaction" and it indicates it was viewed on April 14, 2023, at 2:12 pm by S.NAVEENA Selvamani. The dashboard content includes a gauge chart titled "Copy of New Loans Report" with a scale from ₹0 to ₹100. The needle points to ₹62. Below the chart is a link "View Report (Copy of New Loans Report)". The bottom of the screen shows the Windows taskbar with various icons and the date/time: 8:05 PM 4/14/2023.

Go to App Launcher → select Dashboards → select add component → Select the folder → select the option → new lead with loan amount → select the chart → Save.

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead –<https://trailblazer.me/id/naveena6>

Team Member 1-<https://trailblazer.me/id/kvelmurugan6>

Team Member 2 -<https://trailblazer.me/id/mahas72>

Team Member 3-<https://trailblazer.me/id/monic754>

5. ADVANTAGES & DISADVANTAGES

⇒ **ADVANTAGES:**

- Enhanced check-in / check-out capabilities.
- Increased housekeeping efficiency.
- Improved revenue management.
- Increased employee Productivity and engagement.
- Leverage real-time reports and dashboards.

⇒ **DISADVANTAGES:**

- Lack of specialists that have a deep understanding of property management business and its priorities.
- Customer support has a poor reputation.
- The learning curve never seems to end.

6. APPLICATION:

- Enterprise-level platform security that improves with each release.
- Simplified template-based document generation, tracking, and approval.
- Forecasting based on interaction history and automated report scheduling.
- Simplified renewals and leases management.
- Unified data storage, lease administration.

7. CONCLUSION:

- The foremost thing to consider first is that Salesforce is present as an excellent tool and ideal for a cloud application. Salesforce has successfully kept all departments of a company on the same page.
- Salesforce is popular CRM platform today. After reading this tutorial, you would know what CRM is, why Salesforce, what is salesforce services, and its application.

8. FUTURE SCOPE:

- The most promising business nowadays is coming out to be Customer Relationship Management (CRM). Its success is continuously moving forward in 2020 and becoming a favorable career among the people.
- Presently, Salesforce is a preferred career choice if you are looking forward to CRM. Those who opt for it are enjoying high pay and extreme job satisfaction.
- Future job opportunities,
 - ✓ Developer
 - ✓ App Builder
 - ✓ Consultant
 - ✓ Architect
 - ✓ Accountant.

THANK YOU