

PROJECT REPORT  
ON

Property Management Application  
Using Salesforce - (DEV)

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# 1. INTRODUCTION

## 1.1. Overview

The Property Management Salesforce Lightning App is a robust solution that streamlines the property buying process for buyers and empowers marketing and sales teams with valuable tools. Buyers can input their preferences and receive comprehensive property details, along with customized discounts based on their interests. Additionally, the app includes a loan calculator to estimate eligible loan amounts. With secure user profiles for marketing and sales teams, automated workflows, and informative reports and dashboards, the app optimizes operations, improves the buyer experience, and facilitates data-driven decision making in the property management sector.

## 1.2. Purpose

The primary goal of the Property Management Salesforce Lightning App is to offer a complete and effective solution for property buyers, marketing, and sales teams. Its key objectives include simplifying the property buying process, pairing buyers with appropriate properties and discounts, calculating loan eligibility, and ensuring secure data access for marketing and sales teams. Furthermore, the app provides valuable analytics through reports and dashboards, empowering data-driven decision-making and improving overall efficiency within the property management industry.

# 2. PROBLEM DEFINITION AND DESIGN THINKING

## 2.1. Problem Definition:

The property management sector encounters various obstacles, such as inefficiencies in property purchasing, challenges in aligning buyers with appropriate properties, and the absence of personalized offers for potential buyers. Additionally, streamlined loan estimation processes for buyers are often lacking, and there is a demand for secure data access for marketing and sales teams. These difficulties can result in a less satisfactory buyer experience, reduced marketing and sales efficiency, and limited decision-making capabilities for management.

## **2.2. Design Thinking Approach:**

Design Thinking is a user-centred problem-solving methodology that revolves around grasping the needs of users and devising inventive solutions to tackle their challenges effectively. When applied to the development of the Property Management Salesforce Lightning App, the Design Thinking approach would encompass the following stages:

## **2.3. Empathize:**

Gather insights by conducting interviews and seeking feedback from property buyers, marketing, and sales teams to understand their specific challenges, pain points, and expectations. Utilize methods like user surveys and observation to gain a deeper understanding of their behaviours and preferences.

## **2.4. Define:**

Based on the insights obtained during the Empathize phase, distinctly outline the problematic areas. Identify the fundamental needs and demands of buyers, marketing, and sales teams to guide the development of the app.

## **2.5. Ideate:**

Arrange collaborative brainstorming sessions involving a diverse range of stakeholders to foster the generation of inventive ideas and potential solutions. Encourage thinking outside the conventional norms to explore innovative features and functionalities for the app.

## **2.6. Prototype:**

Create rapid and low-fidelity prototypes of the app to visualize the user interface and interactions. Collect feedback from users and stakeholders regarding the prototypes to improve and fine-tune the app's design.

## **2.7. Test:**

Perform usability tests with representative users to assess the functionality and user experience of the app. Identify any potential usability challenges or areas that need improvement and iteratively refine the design based on the feedback received.

## **2.8. Implement:**

Utilizing the feedback and insights gathered during the testing phase, commence the development of the Property Management Salesforce Lightning App. Incorporate the essential features, data model, automation, and security settings in alignment with the principles of the Design Thinking process.

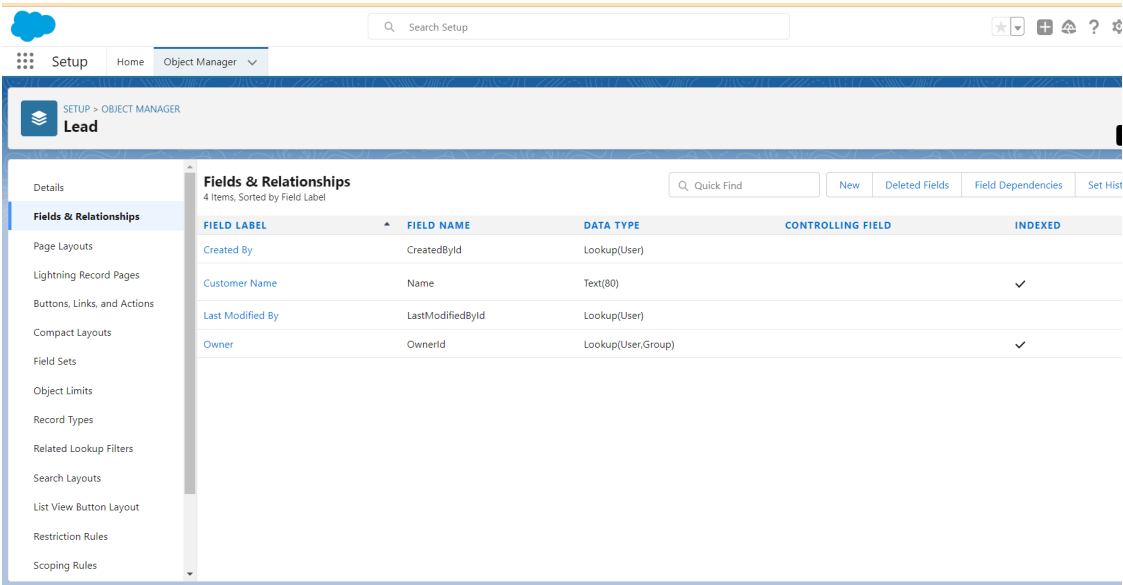
## 2.9. Evaluate:

Consistently collect feedback from users even after the app has been implemented and deployed. Evaluate the app's performance concerning its ability to achieve the defined objectives and user satisfaction.

# 3. RESULT

## 3.1. Data-model:

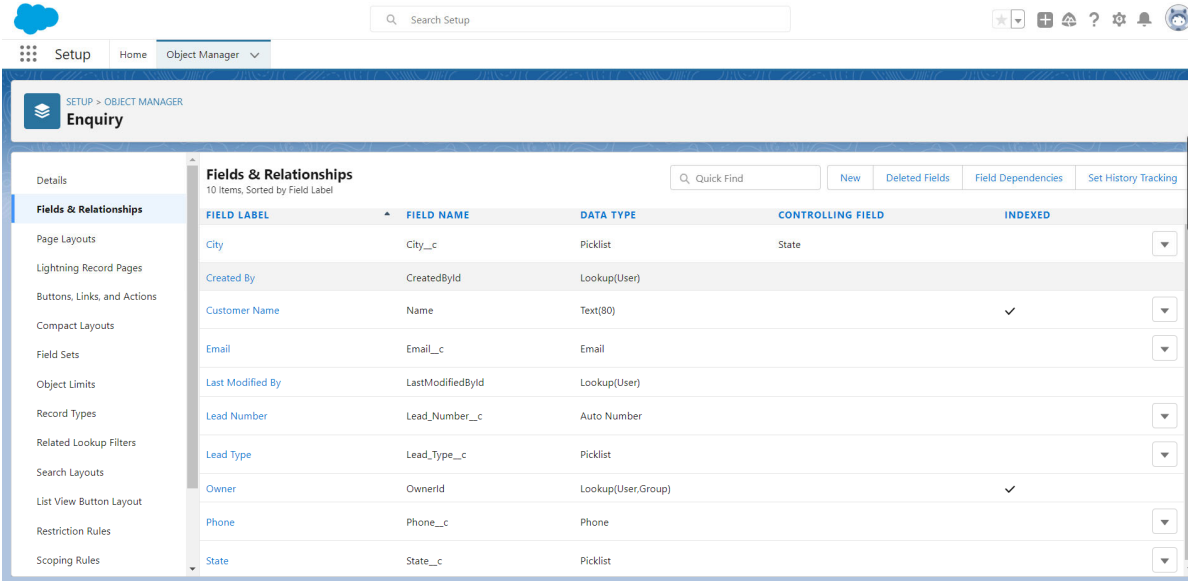
### a) Lead



The screenshot shows the Salesforce Setup interface for the 'Lead' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are 4 items listed, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

### b) Enquiry



The screenshot shows the Salesforce Setup interface for the 'Enquiry' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are 10 items listed, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Lead Number	Lead_Number__c	Auto Number		
Lead Type	Lead_Type__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
State	State__c	Picklist		

c) Property

Setup

Home

Object Manager

Search Setup

Property

Details

Fields & Relationships

16 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Picklist	State	
Commercial	Commercial_c	Picklist	Property Type	
Create Property Type	Create_Property_Type_c	Picklist		
Created By	CreatedById	Lookup(User)		
Customer name	Customer_name_c	Lookup(Enquiry)		✓
Discount	Discount_c	Percent(18, 0)		
Industrial	Industrial_c	Picklist	Property Type	
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount_c	Currency(18, 0)		
Owner	OwnerId	Lookup(User/Group)		✓
Price	Price_c	Number(18, 0)		
Property Name	Name	Text(30)		✓
Property Type	Property_Type_c	Picklist		
Record Type	RecordTypeId	Record Type		✓
Residential	Residential_c	Picklist	Property Type	
State	State_c	Picklist		

d) Loan

Setup

Home

Object Manager

Search Setup

Loan

Details

Fields & Relationships

13 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Sc...

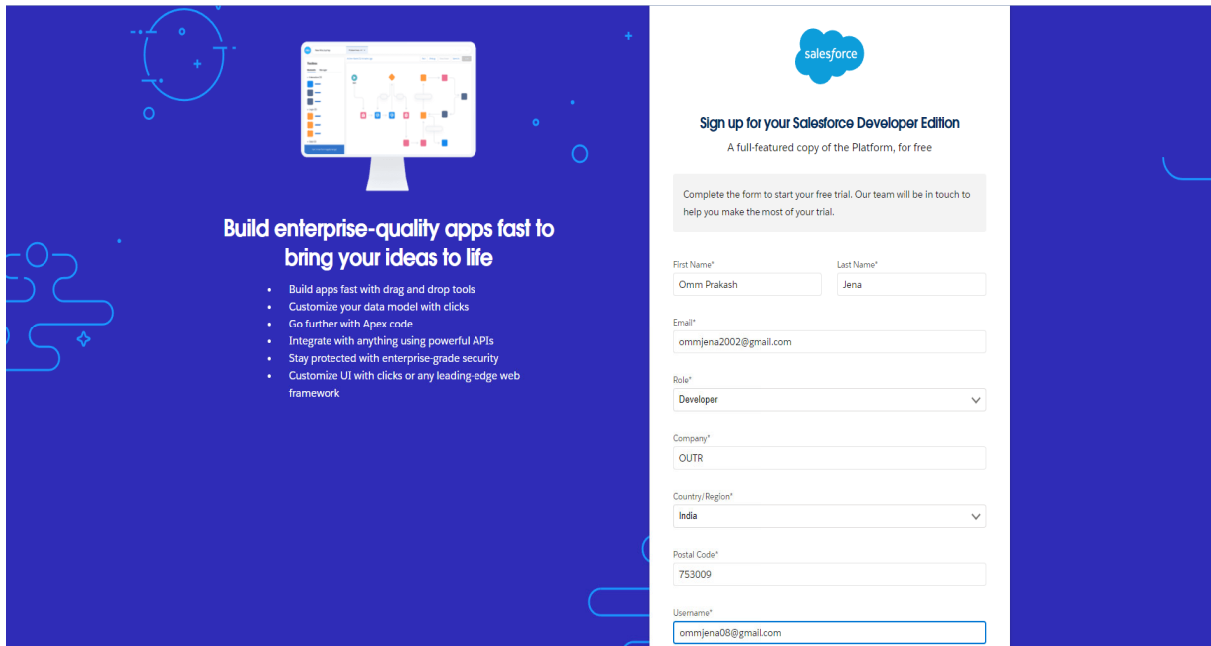
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan_c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Customer name	Customer_name_c	Lookup(Enquiry)		✓
Due date for Loan Payment	Due_date_for_Loan_Payment_c	Date/Time		
Interest Rate	Interest_Rate_c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount_c	Formula (Currency)		
Loan Id	Name	Auto Number		✓
Loan Repayment	Loan_Repayment_c	Number(18, 0)		
Owner	OwnerId	Lookup(User/Group)		✓
Property name	Property_name_c	Lookup(Property)		✓
Term	Term_c	Number(18, 0)		
Total Loan Installments	Total_Loan_Installments_c	Number(18, 0)		

### 3.2. Activity and Screenshot:

#### MILESTONE 1: Salesforce

##### ACTIVITY 1: Creating Developer Account

Created Developer Account using the given Link present in the DeveloperEdition Link.



**Build enterprise-quality apps fast to bring your ideas to life**

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

**Sign up for your Salesforce Developer Edition**  
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*  Last Name\*

Email\*

Role\*

Company\*

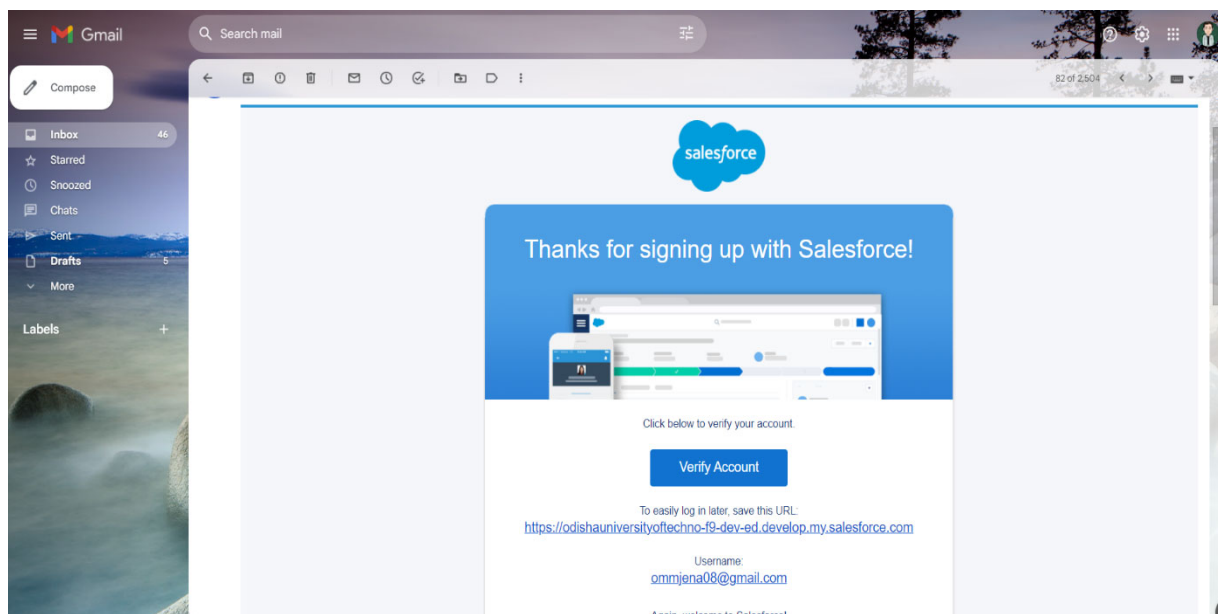
Country/Region\*

Postal Code\*

Username\*

##### ACTIVITY 2: Account Activation

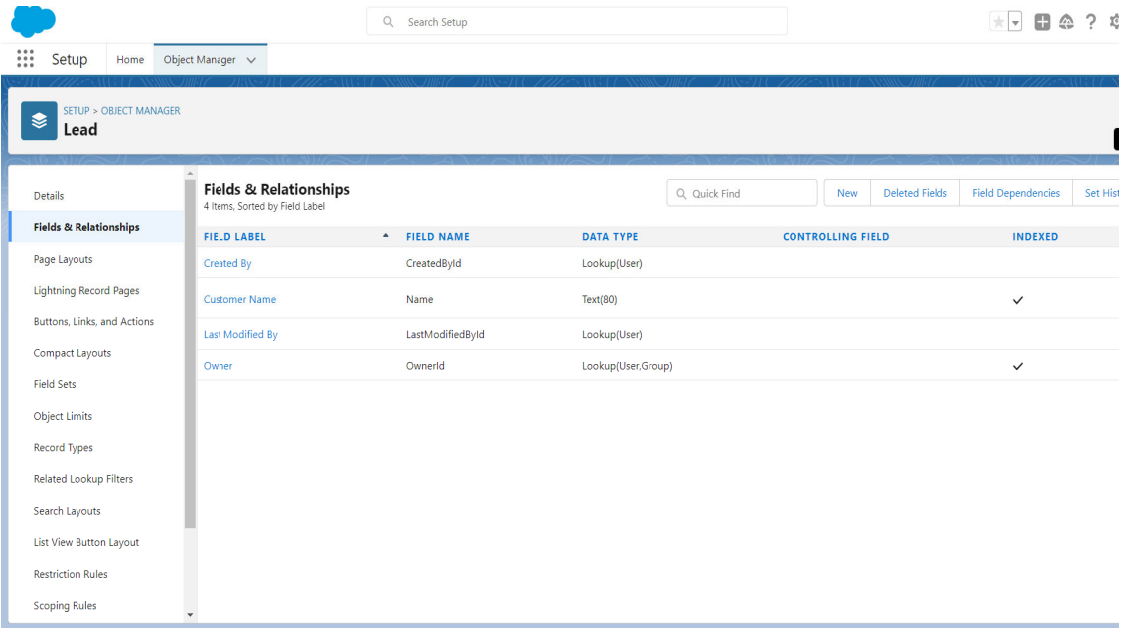
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10 mins.



## MILESTONE 2: Object

### ACTIVITY 1: Create Object Lead

Created Object named Lead as displayed in below image.

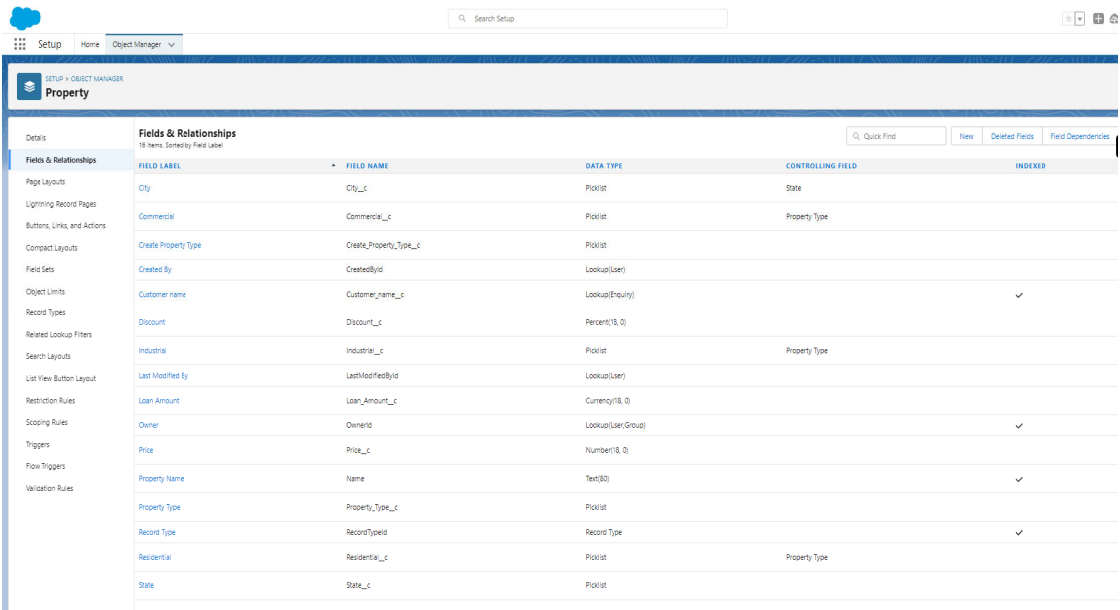


The screenshot shows the Salesforce Setup interface for the 'Lead' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Lead' and shows the 'Fields & Relationships' section with 4 items, sorted by Field Label. The table below lists the fields and their properties.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Crested By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

### ACTIVITY 2: Create Object Property

Created Object named Property as displayed in below image.



The screenshot shows the Salesforce Setup interface for the 'Property' object. 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, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Property' and shows the 'Fields & Relationships' section with 16 items, sorted by Field Label. The table below lists the fields and their properties.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Picklist	State	
Commercial	Commercial_c	Picklist	Property Type	
Create Property Type	Create_Property_Type_c	Picklist		
Created By	CreatedById	Lookup(User)		
Customer name	Customer_name_c	Lookup(Enquiry)		✓
Discount	Discount_c	Percent(18, 0)		
Industrial	Industrial_c	Picklist	Property Type	
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount_c	Currency(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price_c	Number(18, 0)		
Property Name	Name	Text(80)		✓
Property Type	Property_Type_c	Picklist		
Record Type	RecordTypeId	Record Type		✓
Residential	Residential_c	Picklist	Property Type	
State	State_c	Picklist		

**ACTIVITY 3: Create Object Enquiry**  
Created Object named Enquiry as displayed in below image.

Smart Internz

Search Setup

Setup Home Object Manager

Enquiry

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

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

10 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Lead Number	Lead_Number__c	Auto Number		
Lead Type	Lead_Type__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
State	State__c	Picklist		

**ACTIVITY 4: Create Object Loan**  
Created Object named Loan as displayed in below image.

Smart Internz

Search Setup

Setup Home 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

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

13 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

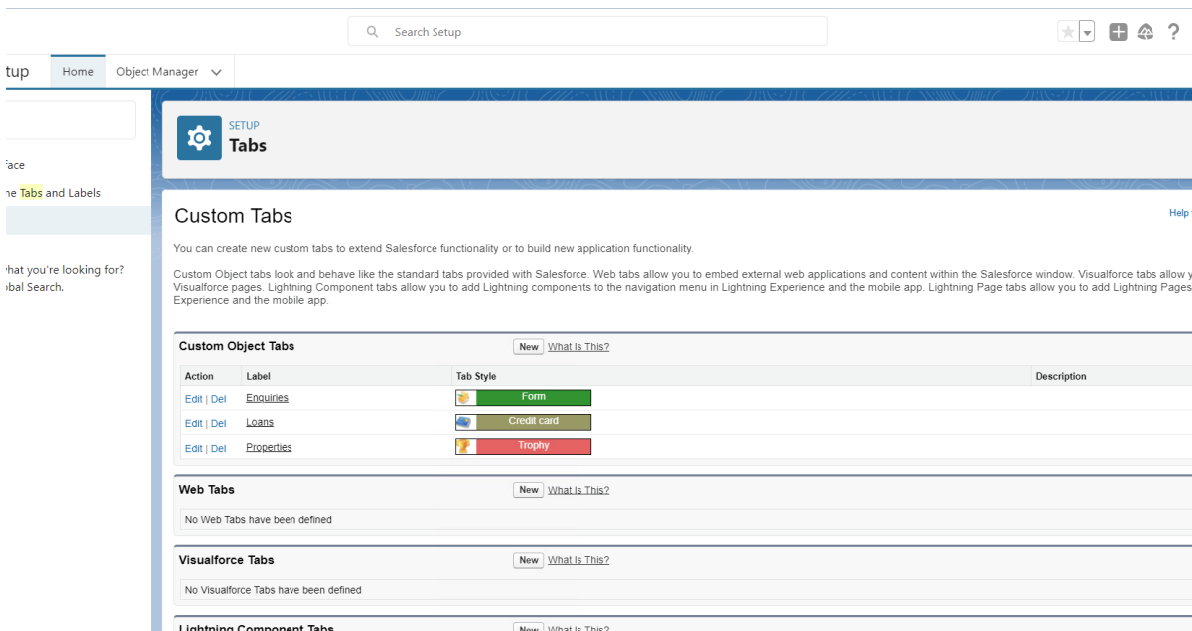
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Customer name	Customer_name__c	Lookup(Enquiry)		✓
Due date for Loan Payment	Due_date_for_Loan_Payment__c	Date/Time		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
LoanId	Name	Auto Number		✓
Loan Repayment	Loan_Repayment__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Property name	Property_name__c	Lookup(Property)		✓
Term	Term__c	Number(18, 0)		
Total Loan Installments	Total_Loan_Installments__c	Number(18, 0)		



### MILESTONE 3: Tab

#### ACTIVITY 1: Create Lightning Tab for Enquiry, Property and Loan

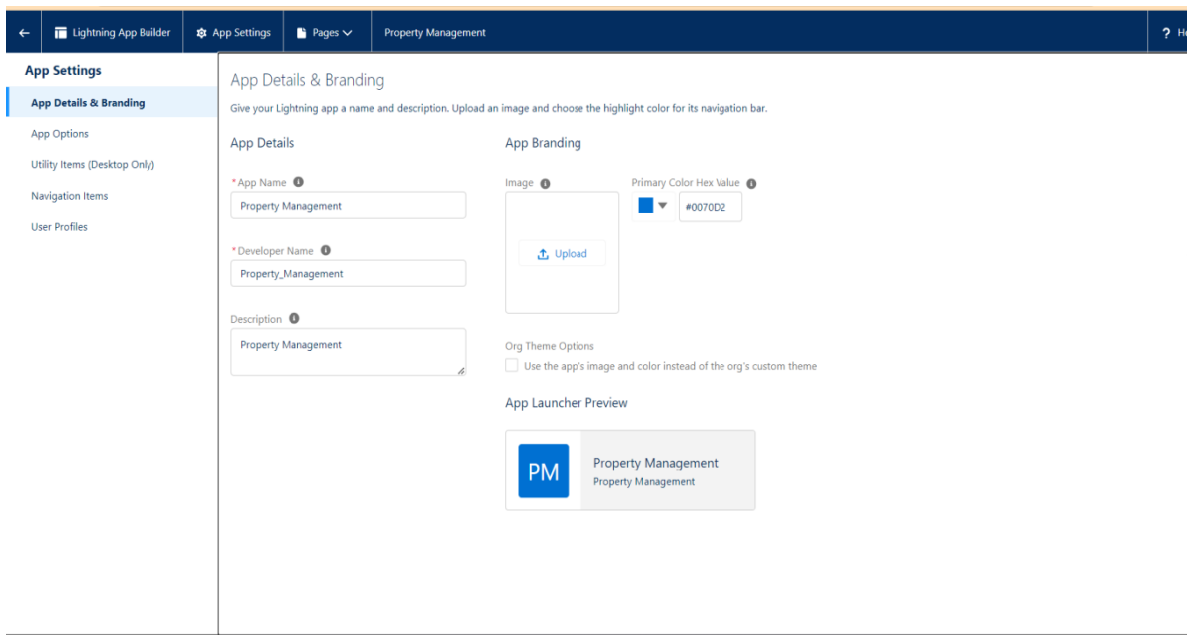
Created Lightning Tab named Enquiry, Property and Loan as displayed in below image.



### MILESTONE 4: The Lightning App

#### ACTIVITY 1: Create the Lightning App

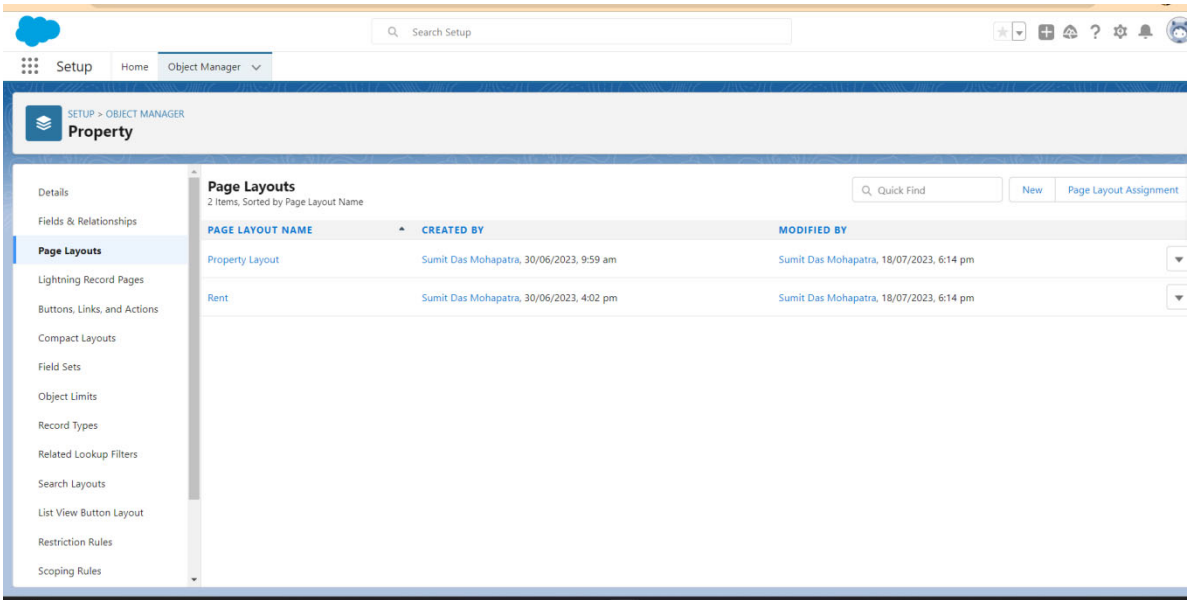
Created Lightning Tab named Property Management as displayed in below image.



## MILESTONE 5: Fields

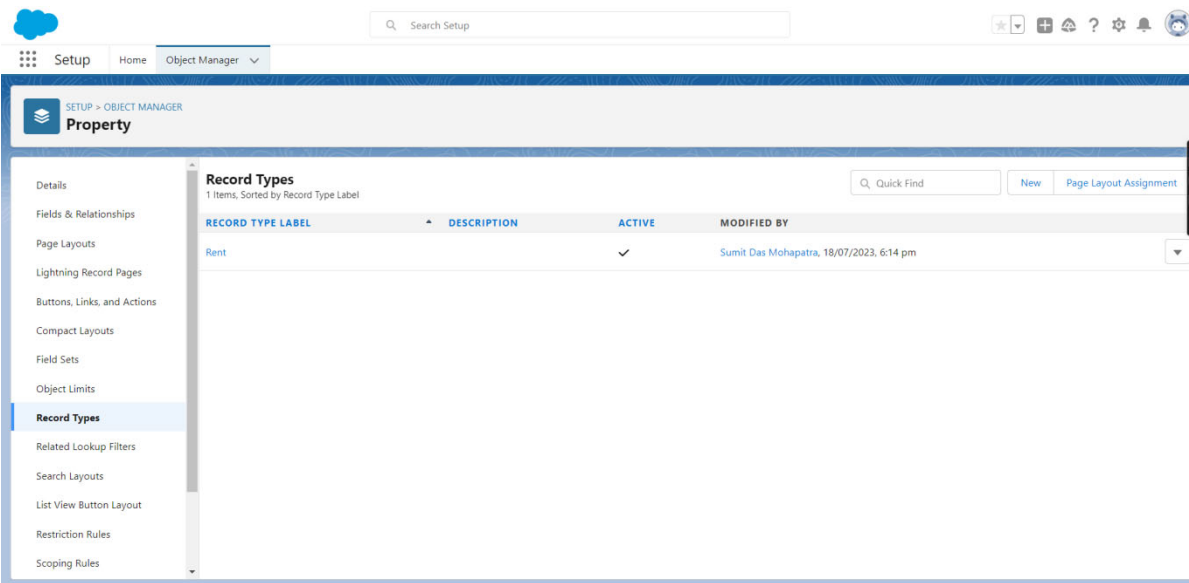
### ACTIVITY 1: Create Page Layout For Property Object and Rent Page Layout

Created Page Layout for Property Object as Property Layout and also Rent Page Layouts displayed in below image.



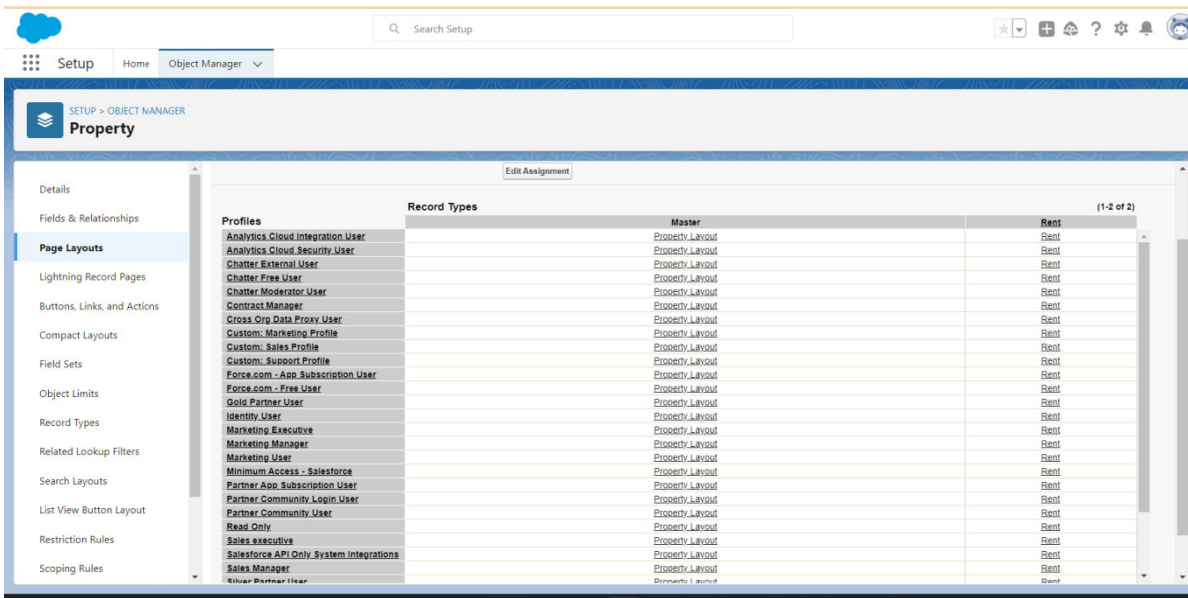
### ACTIVITY 2: Create Record Type For Property Object

Created Record Type for Property Object as Buy and Rent as displayed in below image.



### ACTIVITY 3: AssignPage Layout Assignment

Assigned Page Layout with record type for Property Layout and also Rent Page Layout as displayed in below image.

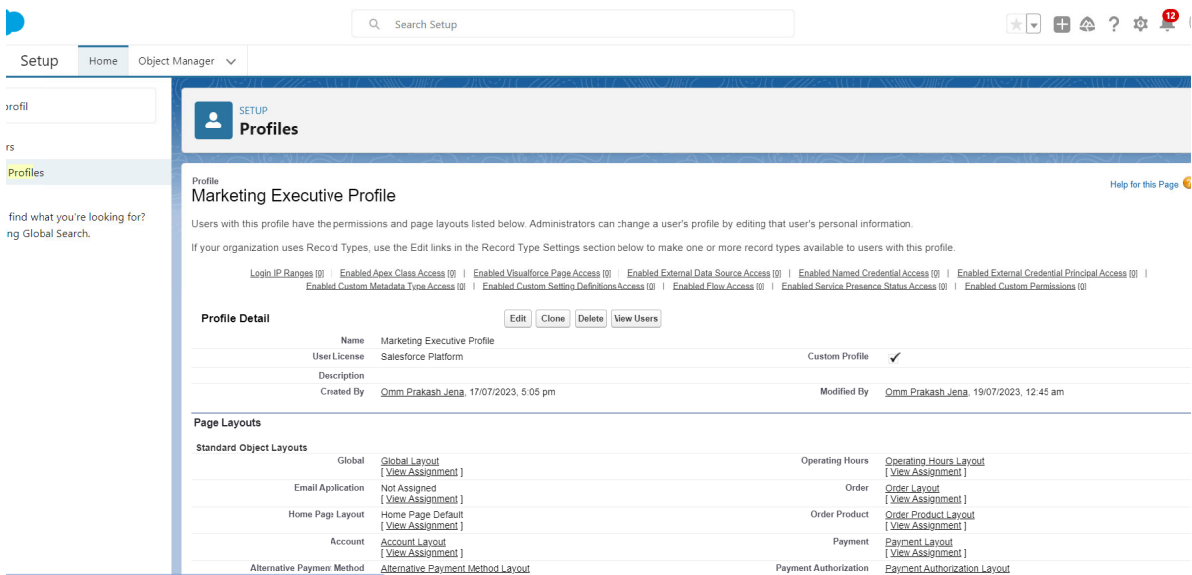


### MILESTONE 6: Profile

#### ACTIVITY 1: Create A New Profile

Created new profile for the following and as displayed with images.

a) Marketing Executive profile



## b) Marketing Manager profile

Search Setup

Setup Home Object Manager

profil

Users Profiles

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

Profile

Marketing Manager profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Edit Clone Delete View Users

Name	Marketing Manager profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	Qmm.Prakash.Jena, 17/07/2023, 5:11 pm	Modified By	Qmm.Prakash.Jena, 19/07/2023, 12:45 am

Page Layouts

Standard Object Layouts	Global	Global Layout [ View Assignment ]	Operating Hours	Operating Hours Layout [ View Assignment ]
	Email Application	Not Assigned [ View Assignment ]	Order	Order Layout [ View Assignment ]
	Home Page Layout	Home Page Default [ View Assignment ]	Order Product	Order Product Layout [ View Assignment ]
	Account	Account Layout [ View Assignment ]	Payment	Payment Layout [ View Assignment ]
	Alternative Payment Method	Alternative Payment Method Layout [ View Assignment ]	Payment Authorization	Payment Authorization Layout [ View Assignment ]

## c) Sales Executive profile

Search Setup

Setup Home Object Manager

profil

Users Profiles

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

Profile

Sales executive profile

Users with this profile have the permissions and page layout listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Edit Clone Delete View Users

Name	Sales executive profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	Qmm.Prakash.Jena, 17/07/2023, 7:50 pm	Modified By	Qmm.Prakash.Jena, 19/07/2023, 12:45 am

Page Layouts

Standard Object Layouts	Global	Global Layout [ View Assignment ]	Operating Hours	Operating Hours Layout [ View Assignment ]
	Email Application	Not Assigned [ View Assignment ]	Order	Order Layout [ View Assignment ]
	Home Page Layout	Home Page Default [ View Assignment ]	Order Product	Order Product Layout [ View Assignment ]
	Account	Account Layout [ View Assignment ]	Payment	Payment Layout [ View Assignment ]
	Alternative Payment Method	Alternative Payment Method Layout [ View Assignment ]	Payment Authorization	Payment Authorization Layout [ View Assignment ]

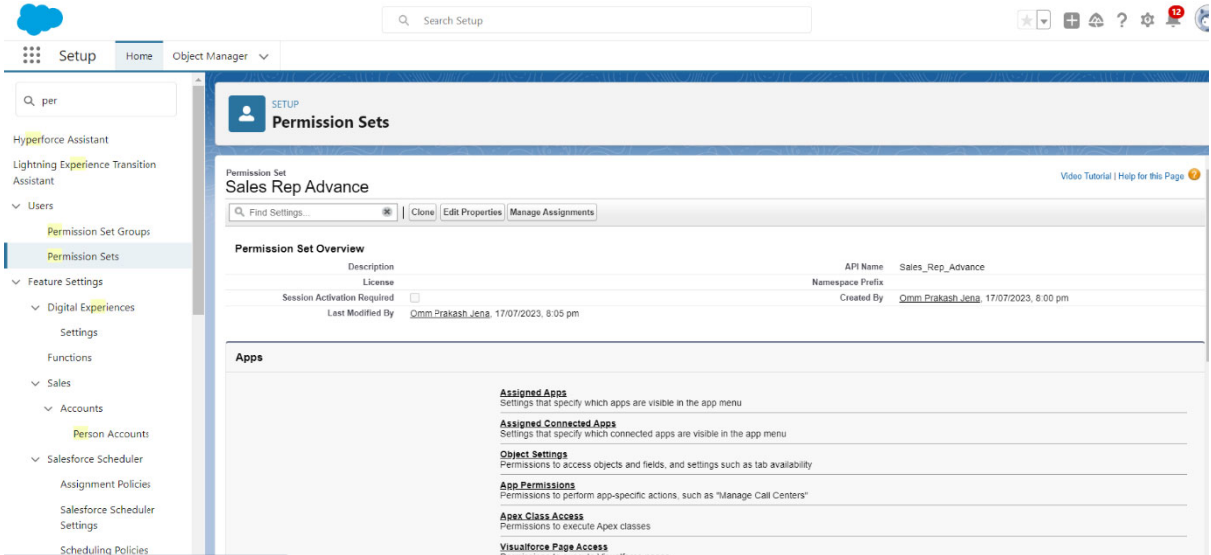
The screenshot displays the 'Users' section within the Dynamics 365 Setup application. The left-hand navigation pane includes options like 'Setup', 'Home', 'Object Manager', 'Users', 'Feature Settings', 'Data.com', 'Prospector Users', 'User Interface', 'Action Link Templates', 'Actions & Recommendations', 'App Menu', and 'Custom Labels'. The main area shows the user profile for 'Sunny Gupta'. At the top, there are tabs for 'Permission Set Assignments (3)', 'Permission Set Assignments: Activation Required (0)', 'Permission Set Group Assignments (0)', 'Permission Set License Assignments (0)', 'Personal Groups (0)', 'Public Group Membership (0)', 'Queue Membership (0)', 'Team (0)', 'Managers in the Role Hierarchy (0)', 'OAuth Apps (0)', 'Third-Party Account Links (0)', 'Installed Mobile Apps (0)', 'Authentication Settings for External Systems (0)', 'Login History (0)', and 'User Provisioning Accounts (0)'. Below the user name, there are buttons for 'Edit', 'Sharing', 'Reset Password', and 'Freeze'. The user details are organized into two columns:

User Detail			
Name	Sunny Gupta	Role	Salesforce
Alias	Sanj	User License	Sales Manager
Email	<a href="#">omijens2002@gmail.com [Verify]</a>	Profile	
Username	sunnyguptaomm@thesmartbridge.com	Active	<input checked="" type="checkbox"/>
Nickname	Sunny	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">[...]</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		Hib. Contrast Palette on Charts	<input type="checkbox"/>

## MILESTONE 8: Permission Set

### ACTIVITY 1: Create Permission Set

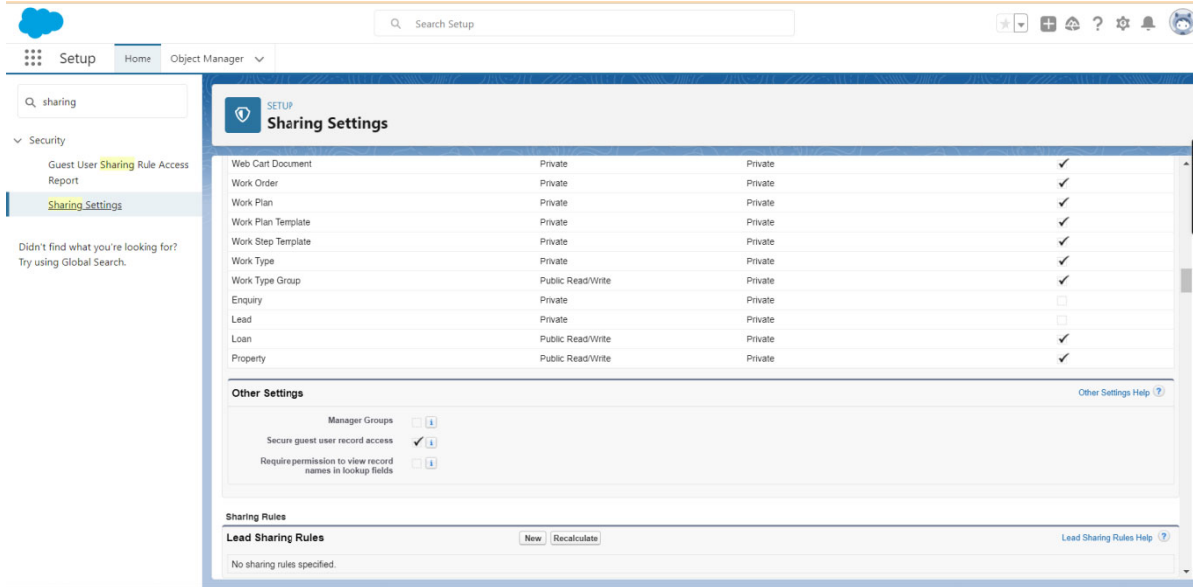
Created permission set with named Sales Rep Advance as displayed in below image.



## MILESTONE 9: Set Up For OWD

### ACTIVITY 1: Create OWD Setting

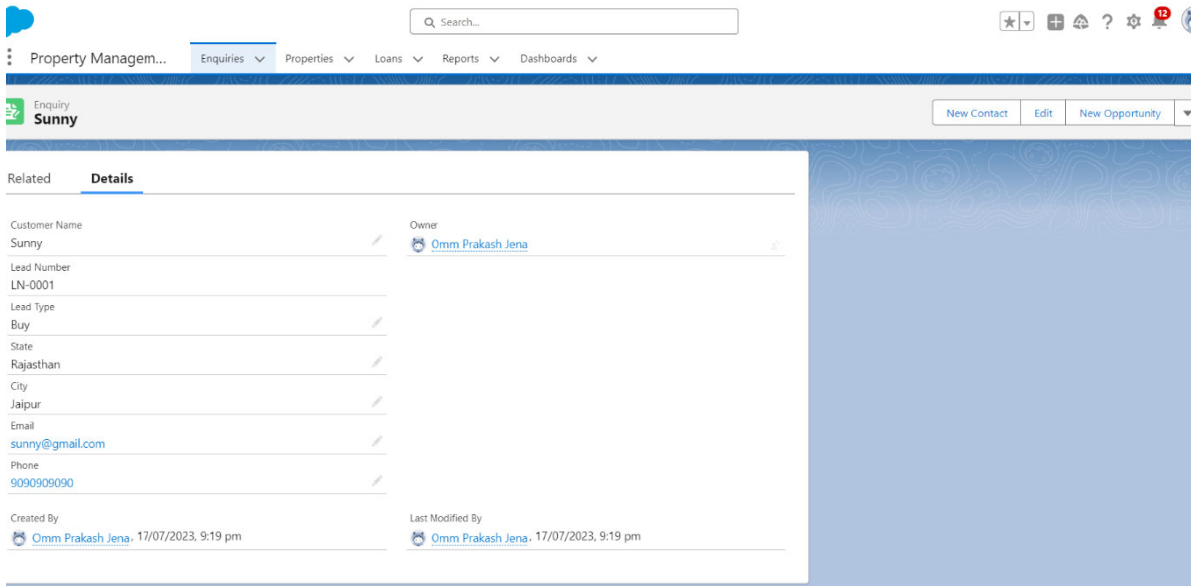
Setup the OWD Setting as displayed in below image.



MILESTONE 10: User Adoption

ACTIVITY 1: Create, View Record for Enquiry

Created and Viewed the record as displayed in below image.



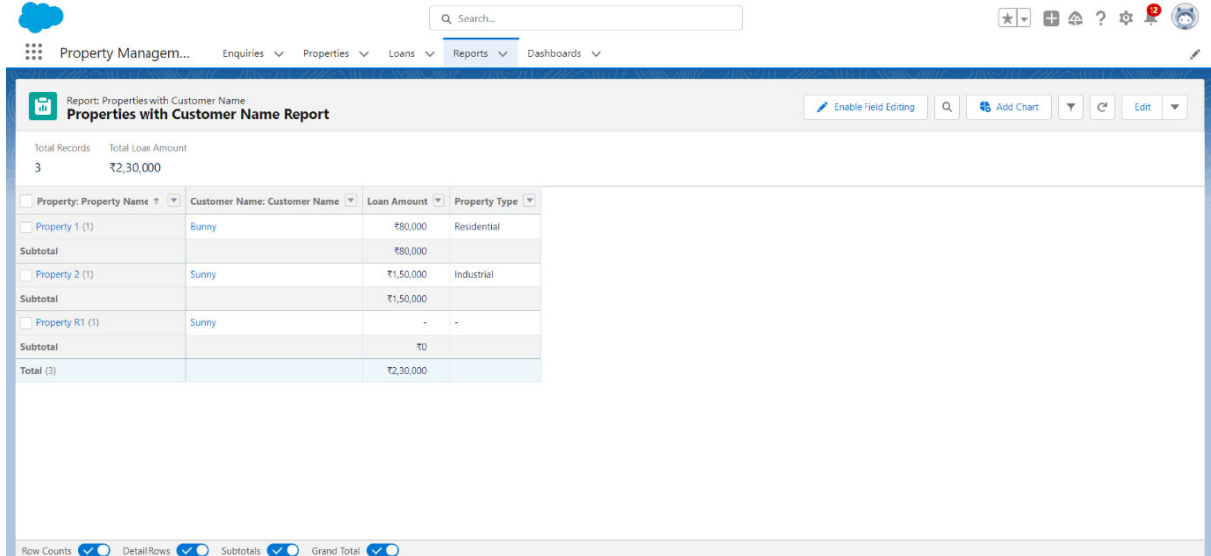
The screenshot shows the 'Enquiry Sunny' record in the Property Management system. The record is displayed in a 'Details' view. The record includes the following information:

- Customer Name: Sunny
- Lead Number: LN-0001
- Lead Type: Buy
- State: Rajasthan
- City: Jaipur
- Email: sunny@gmail.com
- Phone: 9090909090
- Owner: Omm Prakash Jena
- Created By: Omm Prakash Jena, 17/07/2023, 9:19 pm
- Last Modified By: Omm Prakash Jena, 17/07/2023, 9:19 pm

MILESTONE 11: Report

ACTIVITY 1: Create Report

Created the report as displayed in below image.



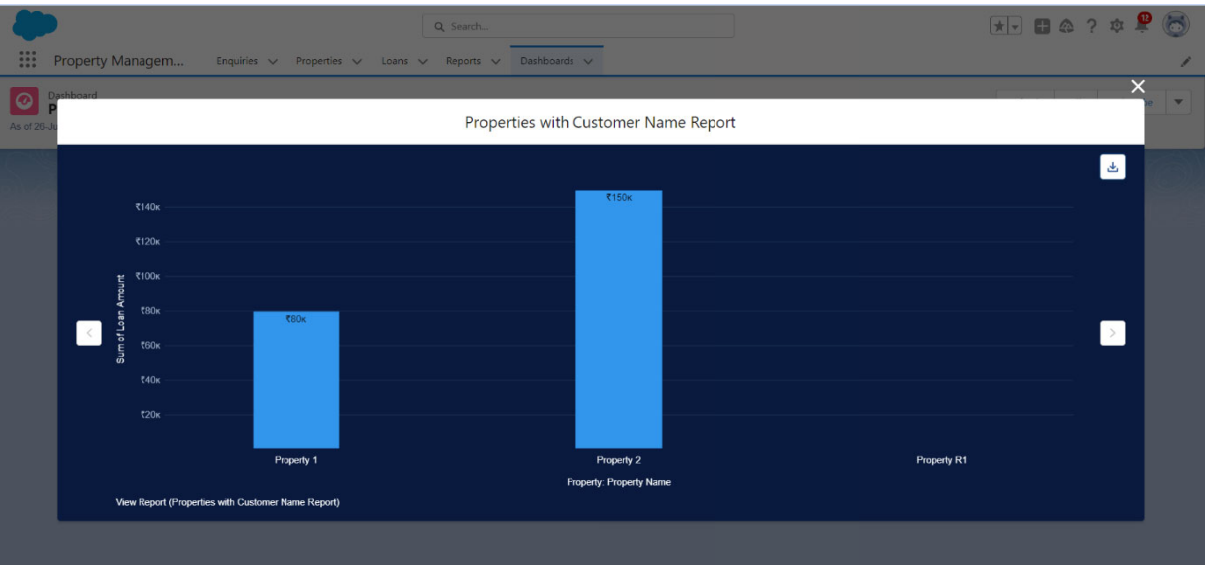
The screenshot shows the 'Properties with Customer Name Report' in the Property Management system. The report is displayed in a table view. The report includes the following information:

Property: Property Name	Customer Name: Customer Name	Loan Amount	Property Type
Property 1 (1)	Sunny	₹80,000	Residential
Subtotal		₹80,000	
Property 2 (1)	Sunny	₹1,50,000	Industrial
Subtotal		₹1,50,000	
Property R1 (1)	Sunny	-	-
Subtotal		₹0	
Total (3)		₹2,30,000	

MILESTONE 12: Dashboards

ACTIVITY 1: Create Dashboards

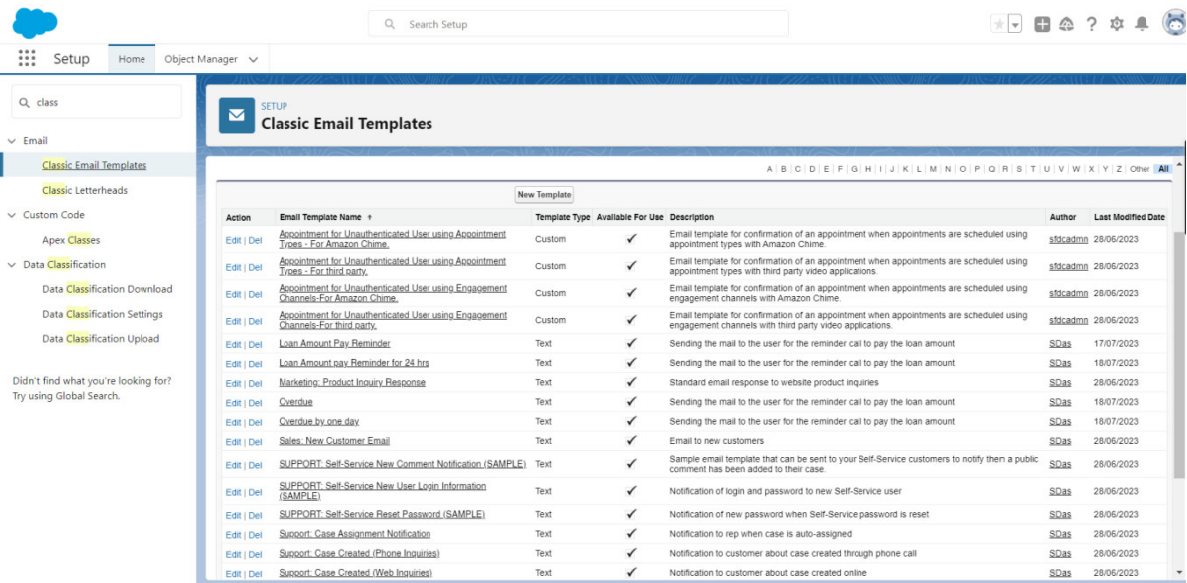
Created the Dashboards as displayed in below image.



MILESTONE 13: Flow Builder

ACTIVITY 1: Create Classic Email Template

Created the Classic Email Template as displayed in below image.



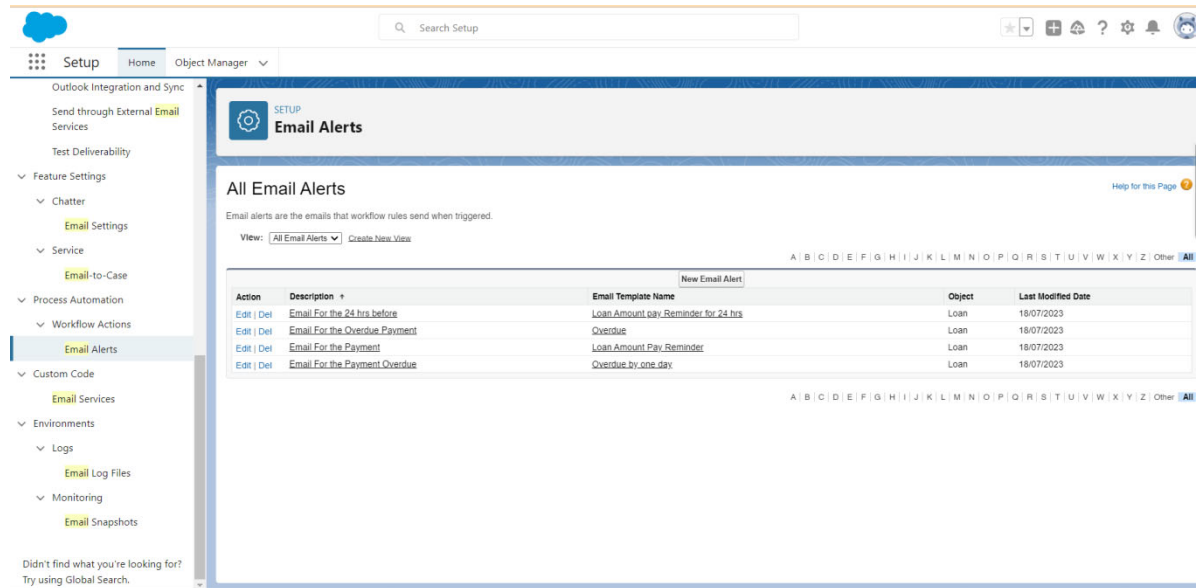
The screenshot shows the "Classic Email Templates" setup page. It includes a search bar, navigation tabs (Setup, Home, Object Manager), and a list of templates. The table below lists the templates with their names, types, availability, descriptions, authors, and last modified dates.

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit   Del	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon Chime.	s33cadm0	28/06/2023
Edit   Del	Appointment for Unauthenticated User using Appointment Types - For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications.	s33cadm0	28/06/2023
Edit   Del	Appointment for Unauthenticated User using Engagement Channels For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon Chime.	s33cadm0	28/06/2023
Edit   Del	Appointment for Unauthenticated User using Engagement Channels For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications.	s33cadm0	28/06/2023
Edit   Del	Loan Amount Pay Reminder	Text	✓	Sending the mail to the user for the reminder call to pay the loan amount	SDAs	17/07/2023
Edit   Del	Loan Amount pay Reminder for 24 hrs	Text	✓	Sending the mail to the user for the reminder call to pay the loan amount	SDAs	18/07/2023
Edit   Del	Marketing Product Inquiry Response	Text	✓	Standard email response to website product inquiries	SDAs	28/06/2023
Edit   Del	Overdue	Text	✓	Sending the mail to the user for the reminder call to pay the loan amount	SDAs	18/07/2023
Edit   Del	Overdue by one day	Text	✓	Sending the mail to the user for the reminder call to pay the loan amount	SDAs	18/07/2023
Edit   Del	Sales New Customer Email	Text	✓	Email to new customers	SDAs	28/06/2023
Edit   Del	SUPPORT Self-Service New Comment Notification (SAMPLE)	Text	✓	Sample email template that can be sent to your Self-Service customers to notify them a public comment has been added to their case.	SDAs	28/06/2023
Edit   Del	SUPPORT Self-Service New User Login Information (SAMPLE)	Text	✓	Notification of login and password to new Self-Service user	SDAs	28/06/2023
Edit   Del	SUPPORT Self-Service Reset Password (SAMPLE)	Text	✓	Notification of new password when Self-Service password is reset	SDAs	28/06/2023
Edit   Del	Support Case Assignment Notification	Text	✓	Notification to rep when case is auto-assigned	SDAs	28/06/2023
Edit   Del	Support Case Created (Phone Inquiries)	Text	✓	Notification to customer about case created through phone call	SDAs	28/06/2023
Edit   Del	Support Case Created (Web Inquiries)	Text	✓	Notification to customer about case created online	SDAs	28/06/2023



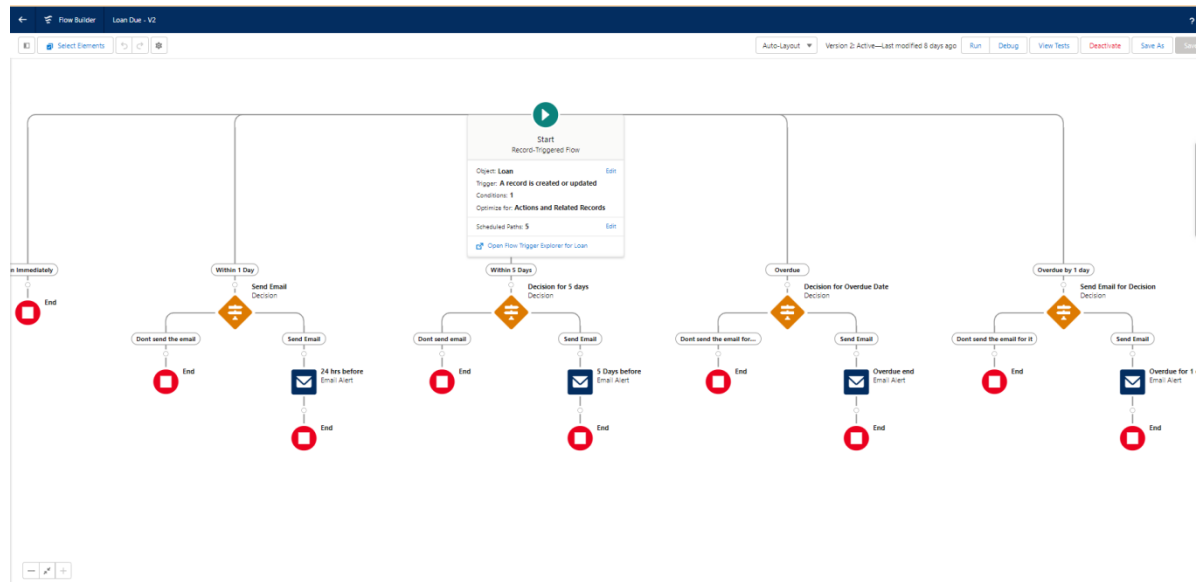
## ACTIVITY 2: Create the Email Alerts

Created the Email Alerts as displayed in below image.



## ACTIVITY 3: Create Flows

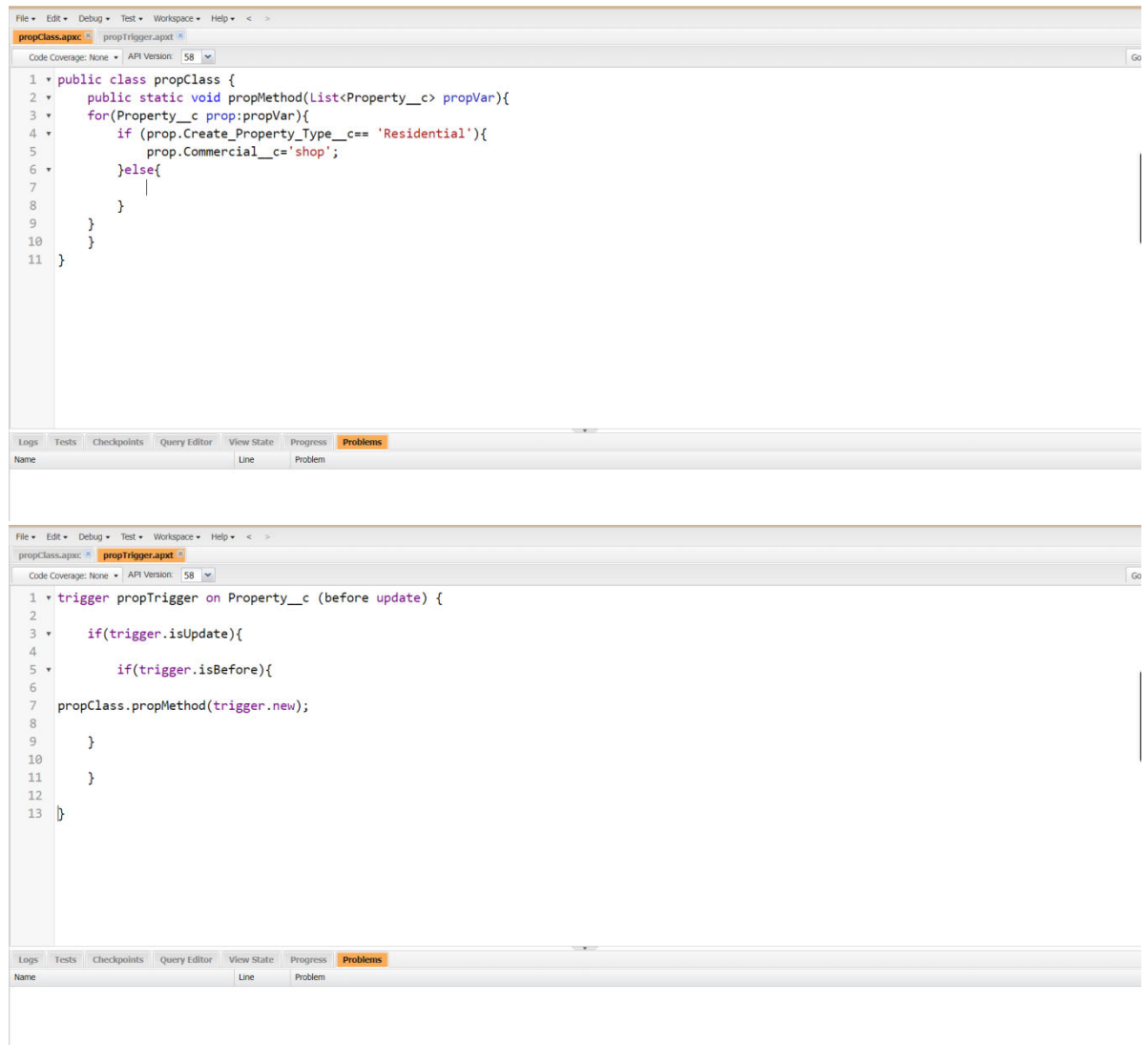
Created the Flow with decision and email alert as displayed in below image.



## MILESTONE 14: Apex Triggers

### ACTIVITY 1: Create Trigger

Created the two files of Apex Class and Apex Triggers as displayed in below image.



```

1 public class propClass {
2     public static void propMethod(List<Property__c> propVar){
3         for(Property__c prop:propVar){
4             if (prop.Create_Property_Type__c== 'Residential'){
5                 prop.Commercial__c='shop';
6             }else{
7                 |
8             }
9         }
10    }
11 }

```

```

1 trigger propTrigger on Property__c (before update) {
2
3     if(trigger.isUpdate){
4
5         if(trigger.isBefore){
6
7             propClass.propMethod(trigger.new);
8         }
9     }
10
11 }
12
13 }

```

## 4. TRAILHEAD PROFILE PUBLIC URL:

My Trailhead profile public URL is:

<https://www.salesforce.com/trailblazer/opjenaz>

## 5. ADVANTAGES AND DISADVANTAGES:

Advantages of the Property Management Salesforce Lightning App:

1. **Data-Driven Decision Making:** The app's reporting and dashboard features offer valuable insights into key performance metrics, such as the count of loans passed, properties purchased, and deals closed. This enables

management to make data-driven decisions and refine strategies for better outcomes.

2. **Increased Productivity and Collaboration:** The app centralizes property and buyer data, fostering collaboration among team members. This leads to increased productivity and a more coordinated approach to property management.
3. **Customizable and Scalable Solution:** Being built on the Salesforce Lightning platform, the app is highly customizable and can be tailored to meet specific business needs. It can also scale with the growth of the property management business.
4. **Enhanced User Experience:** With a focus on user-centric design, the app provides an intuitive and seamless user experience for both buyers and team members. This enhances user satisfaction and adoption rates.
5. **Competitive Advantage:** Implementing a sophisticated Salesforce Lightning app for property management provides a competitive advantage in the industry. It demonstrates the company's commitment to innovation and customer-centricity, attracting more buyers and investors.

#### Disadvantages of the Property Management Salesforce Lightning App:

1. **Maintenance and Upgrades:** Regular maintenance, updates, and improvements are necessary to keep the app running smoothly and aligned with evolving business needs. This could require ongoing development and additional costs.
2. **Potential Customization Limitations:** While Salesforce is highly customizable, certain complex customizations may not be achievable or might require significant effort. This could limit the app's flexibility in certain scenarios.
3. **Performance Issues:** Depending on the app's complexity and data volume, performance issues such as slow loading times or system lag might occur. Optimizing performance may be necessary to deliver a seamless user experience.
4. **Data Security Concerns:** Despite Salesforce's robust security features, any system handling sensitive customer data poses potential security risks. Regular security audits and measures are crucial to minimize vulnerabilities.
5. **Platform Dependency:** Developing the app on Salesforce makes the solution dependent on the platform's stability and availability. Any disruptions in Salesforce services could impact the app's functionality.

6. **Integration with Legacy Systems:** If the organization has legacy systems that are not compatible with Salesforce, integrating the app with these systems might be challenging and require additional effort.
7. **Limited Offline Functionality:** As Salesforce is primarily cloud-based, the app's offline functionality might be limited. This can be a disadvantage in scenarios with poor or no internet connectivity.

## 6. APPLICATION

Applications of the Property Management Salesforce Lightning App:

1. **Housing Associations:** Housing associations can use the app to manage their property portfolio, track tenants' requirements, and offer discounted housing options based on eligibility criteria. The app facilitates efficient tenant management and property allocation.
2. **Property Management Companies:** Companies offering property management services can benefit from the app by efficiently managing multiple properties, tracking tenant requirements, and optimizing property occupancy rates.
3. **Vacation Rental Agencies:** Vacation rental agencies can use the app to manage their rental properties, match travelers with suitable accommodations, and offer personalized deals to increase bookings and revenue.
4. **Commercial Real Estate Companies:** Companies dealing with commercial real estate can use the app to manage commercial properties, track potential buyers or tenants, and optimize leasing processes.
5. **Private Property Sellers:** Individuals selling their properties can utilize the app to reach potential buyers, showcase property details, and provide personalized offers to attract more interested parties.
6. **Asset Management Firms:** Asset management firms can use the app to track and manage their real estate assets, analyze performance, and make data-driven decisions for investment strategies.

## 7. CONCLUSION

The Property Management Salesforce Lightning App is a robust and flexible solution that transforms the property buying process and boosts efficiency in the real estate and property management sectors. With its streamlined property matching, personalized discounts, and accurate loan estimation features, buyers enjoy a more personalized and satisfying experience. Marketing and sales teams benefit from real-time data insights, leading to improved performance in closing deals. The app's robust security measures ensure the protection of sensitive information while offering distinct user profiles for marketing and sales teams. Additionally, the app's reporting and dashboard functionalities empower management with valuable insights, facilitating data-driven decision-making and enhancing overall business strategies. Ultimately, the Property Management Salesforce Lightning App serves as an innovative tool that fosters growth, enhances customer satisfaction, and provides a competitive edge in the dynamic and competitive property market.

## 8. FUTURESCOPE

Future Scopes of the Property Management Salesforce Lightning App:

- 1. Integration with Smart Contracts:** Integrating the app with smart contracts can automate and secure property transactions, eliminating the need for intermediaries and reducing processing times.
- 2. Mobile App Expansion:** Developing a mobile version of the app can offer greater convenience to buyers, marketing, and sales teams, allowing them to access essential features on the go.
- 3. Voice-Enabled Assistant:** Implementing a voice-enabled assistant within the app can enhance user interactions, making it easier for buyers to search for properties and obtain relevant information using voice commands.
- 4. Machine Learning for Lead Scoring:** Machine learning algorithms can be utilized to analyze buyer behavior and lead data, enabling more accurate lead scoring and prioritization for the sales teams.
- 5. Integration with Third-Party Property Data Sources:** Expanding integration with external property data sources can provide users with access to a broader range of property listings and market insights.
- 6. Global Expansion:** Scaling the app for global markets can cater to diverse property requirements and attract buyers and investors from different regions.