

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1.INTRODUCTIO

1.1 overview

Develop on App for the property management Where buyer can order his Requirements and get the Appropriate Details of the property. According to his interest just provide him with some discounts

What extent he can get the discount. also track whether he is Interested in

Taking the loan available for so just calculate how much loan amount user can

Get it. Provide the security for two different profiles like for marketing and

Sales team. Then finally create the reports and dashboard so there will be

Clear view just get the repots on the count of loan passed getting the property purchased close the deal

1.2 purpose

Property management provides structure and control of the project environment so that the agreed activities will produce

The right products or service to meet the customers expectation. Project

Are temporary structures which must be property managed and controlled

In order to meet their stated objective

2.PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP

3.RESULT

3.1 DATA MODULE :

OBJECT NAME	FIELDS IN THE OBJECT										
1.LEAD	<table><tr><th>FIELD LABLE</th><th>DATA TYPE</th></tr><tr><td>State</td><td>Picklist</td></tr><tr><td>City</td><td>Picklist</td></tr><tr><td>Email</td><td>Email</td></tr><tr><td>Phone</td><td>Phone</td></tr></table>	FIELD LABLE	DATA TYPE	State	Picklist	City	Picklist	Email	Email	Phone	Phone
FIELD LABLE	DATA TYPE										
State	Picklist										
City	Picklist										
Email	Email										
Phone	Phone										

OBJECT NAME	FIELDS IN THE OBJECT										
2. BUY	<table><tr><th>FIELD LABLE</th><th>DATA TYPE</th></tr><tr><td>Property type</td><td>Text</td></tr><tr><td>Dicount</td><td>Percentage</td></tr><tr><td>State</td><td>Picklist</td></tr><tr><td>City</td><td>Picklist</td></tr></table>	FIELD LABLE	DATA TYPE	Property type	Text	Dicount	Percentage	State	Picklist	City	Picklist
FIELD LABLE	DATA TYPE										
Property type	Text										
Dicount	Percentage										
State	Picklist										
City	Picklist										

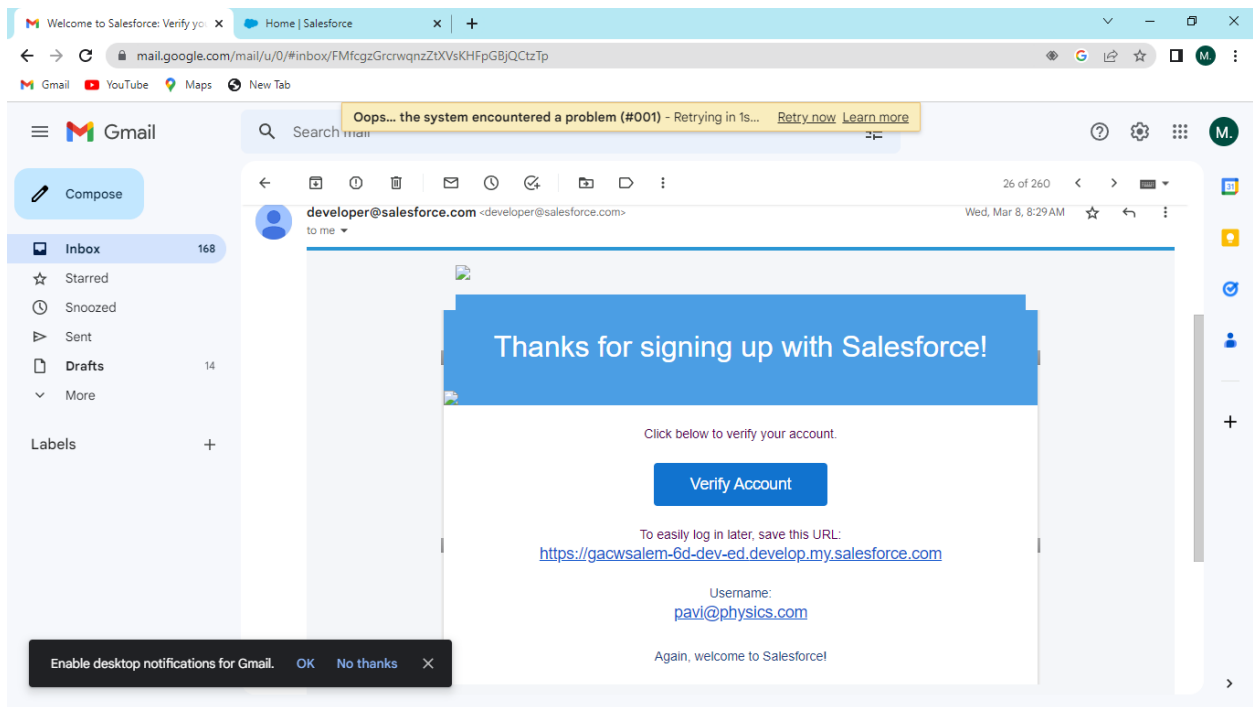
OBJECT NAME	FIELDS IN THE OBJECT	
3.RENT		
	FIELD LABLE	DATA TYPE
	Rent	Auto number
	Rental City	Text
	BHK Type	Picklist

OBJECT NAME	FIELD IN THE OBJECT	
4.LOAN		
	FIELD LABLE	DATA TYPE
	Loan Id	Auto number
	Interest Rate	Currency
	Term	Number
	Annul Loan	Number
	Loan repayment	Number
	Loan Amount	Formula

3.2 ACTIVE AND SCREENSHOT

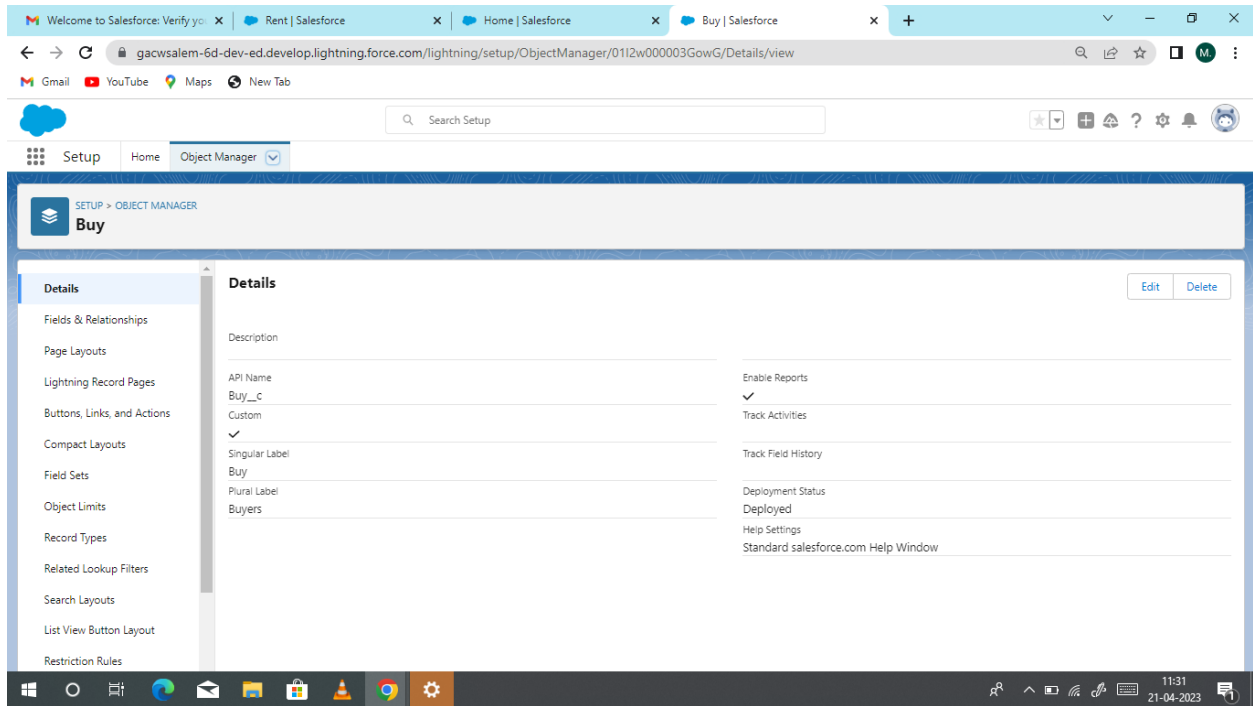
Milestone 1: Salesforce

ACTIVITY:



MILESTONE 2: Object

ACTIVITY: Create object buy



ACTIVITY : Create object Rent

Browser tabs: Welcome to Salesforce: Verify yo... | Rent | Salesforce | Home | Salesforce | Rent | Salesforce

Address bar: gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GowL/Details/view

Navigation: Setup | Home | Object Manager

Page Header: SETUP > OBJECT MANAGER
Rent

Left Sidebar (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

Main Content (Details):

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

Edit Delete

Windows Taskbar: 11:31 21-04-2023

ACTIVITY : Create object Loan

Browser tabs: Welcome to Salesforce: Verify yo... | Rent | Salesforce | Home | Salesforce | Loan | Salesforce

Address bar: gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GowQ/Details/view

Navigation: Setup | Home | Object Manager

Page Header: SETUP > OBJECT MANAGER
Loan

Left Sidebar (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

Main Content (Details):

Details	
Description	
API Name	Loan__c
Custom	✓
Singular Label	Loan
Plural Label	Loans
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Edit Delete

Windows Taskbar: 11:31 21-04-2023

Milestone 3 :Tab

ACTIVITY :

To Create A Tab : Buy

gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w0000003zAN%3Fsetupid%3DCustomTabs

Search Setup

tab

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

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

SETUP Tabs

Custom Object Tab Buyers

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Buyers	Tab Style	Apple
Object	Buy	Splash Page Custom Link	
Description			
Created By	cavitra.cavitra, 13/03/2023, 9:39 pm	Modified By	cavitra.cavitra, 13/03/2023, 9:39 pm

ACTIVITY :

To Create A Tab: Rent

Browser tabs: Welcome to Sale..., Rent | Salesforce, Home | Salesforce, Welcome to Sale..., Recently Viewed, Recently Viewed, Tabs | Salesforce

Address bar: gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w0000003zAX%3Fsetupid%3DCustomTabs

Search Setup

Setup Home Object Manager

Search: tab

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

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

SETUP Tabs

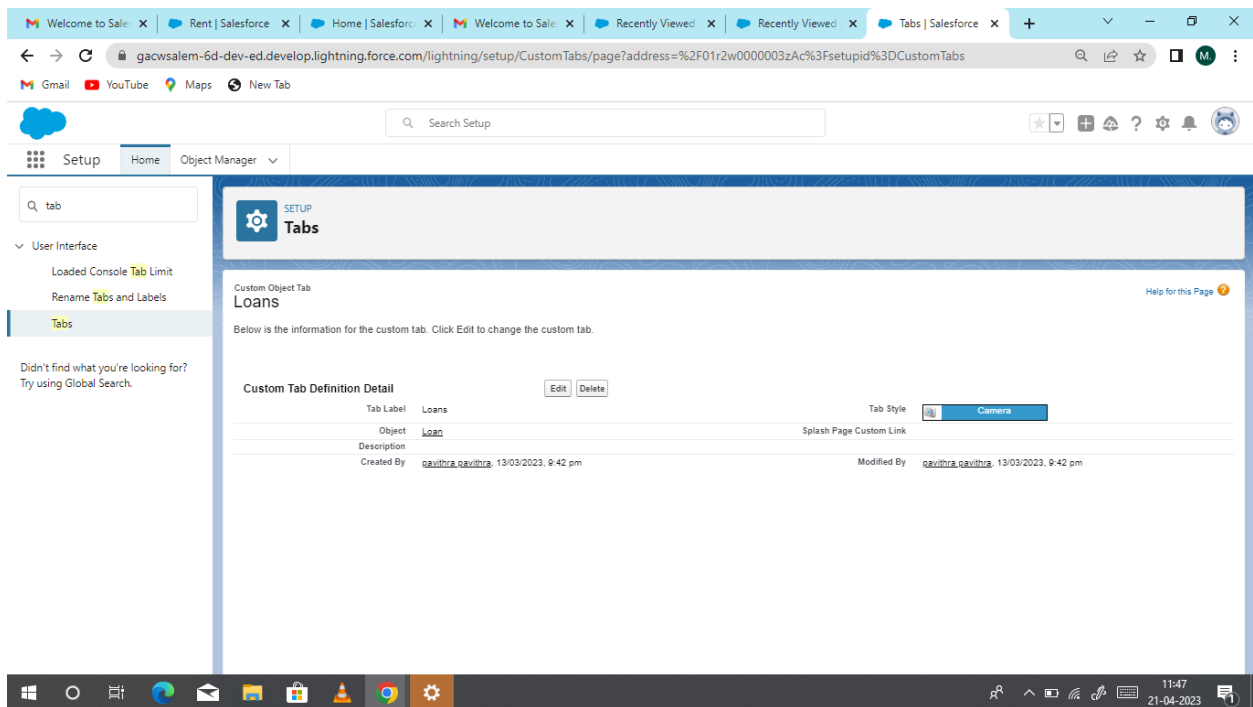
Custom Object Tab: Rents [Help for this Page](#)

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail		Tab Style
Tab Label	Rents	Default
Object	Rent	Splash Page Custom Link
Description		
Created By	qavithra.qavithra, 13/03/2023, 9:41 pm	Modified By: qavithra.qavithra, 13/03/2023, 9:41 pm

ACTIVITY:

To Create A Tab : Loan



Milestone 4:The Lightning App

ACTIVITY:

Create the Lightning app:

Welcome to Salesforce: Verify your identity | Login | Salesforce | Home | Salesforce | App Manager | Salesforce

gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Gmail YouTube Maps New Tab

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

javascript:void(0); New Category

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		08/03/2023, 8:23 am	Classic	

Welcome to Salesforce: Verify your identity | Login | Salesforce | Home | Salesforce | App Manager | Salesforce

gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Gmail YouTube Maps New Tab

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

javascript:void(0); New Category

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

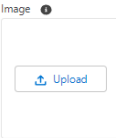
App Details


* App Name [?] Property management

* Developer Name [?] Property-management

Description [?] Enter a description...

App Branding

Image [?]  Upload

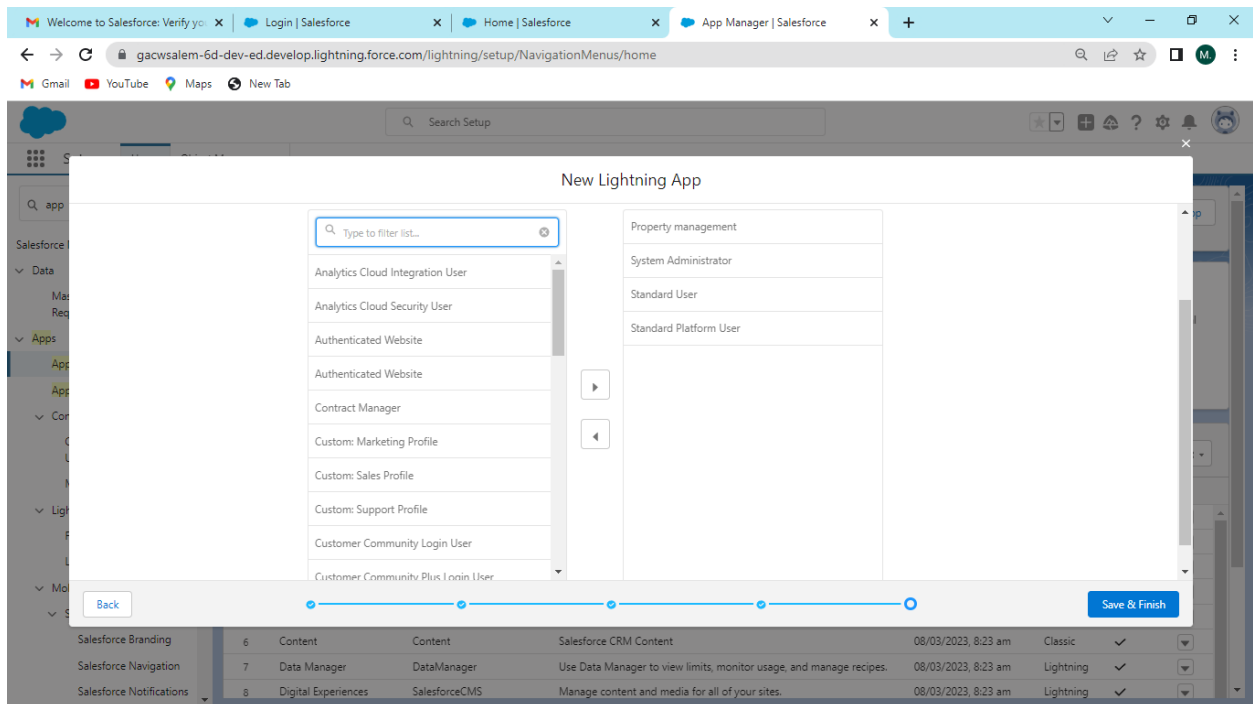
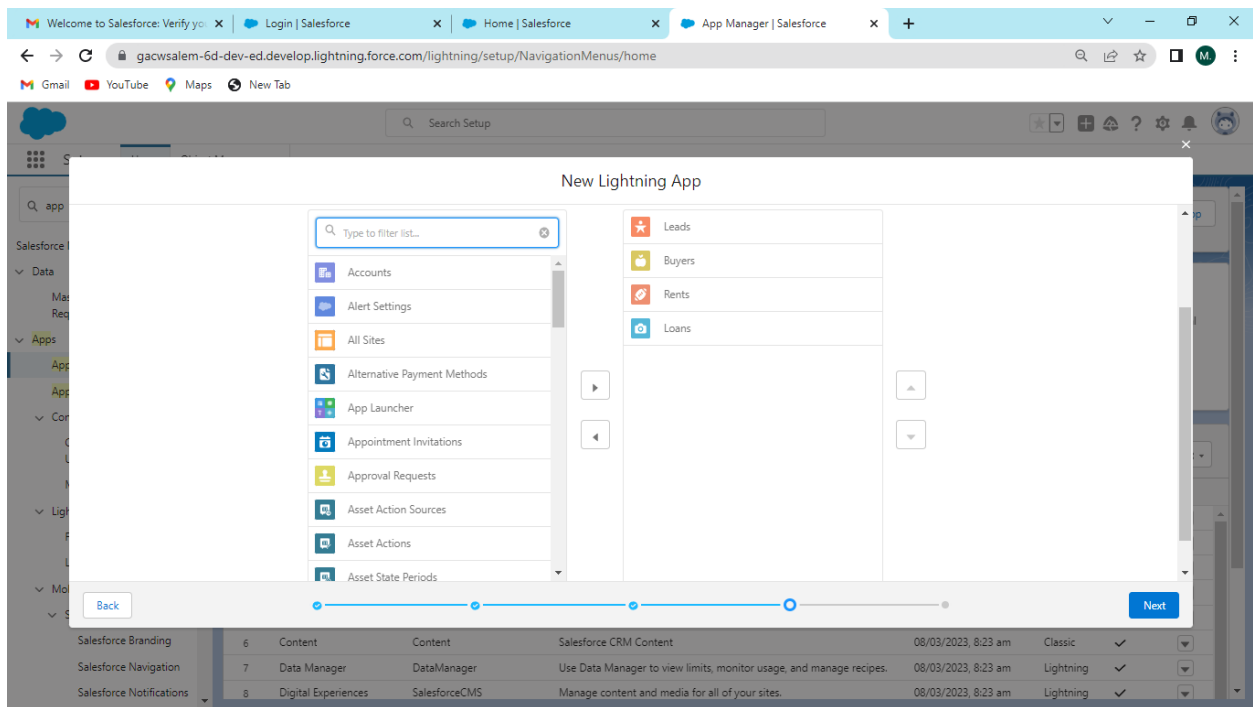
Primary Color Hex Value [?]  #0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

Next

Salesforce Branding	6	Content	Content	Salesforce CRM Content	08/03/2023, 8:23 am	Classic	✓	
Salesforce Navigation	7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	08/03/2023, 8:23 am	Lightning	✓	
Salesforce Notifications	8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	08/03/2023, 8:23 am	Lightning	✓	



Milestone 5: Fields

ACTIVITY:

Create For Object buy:

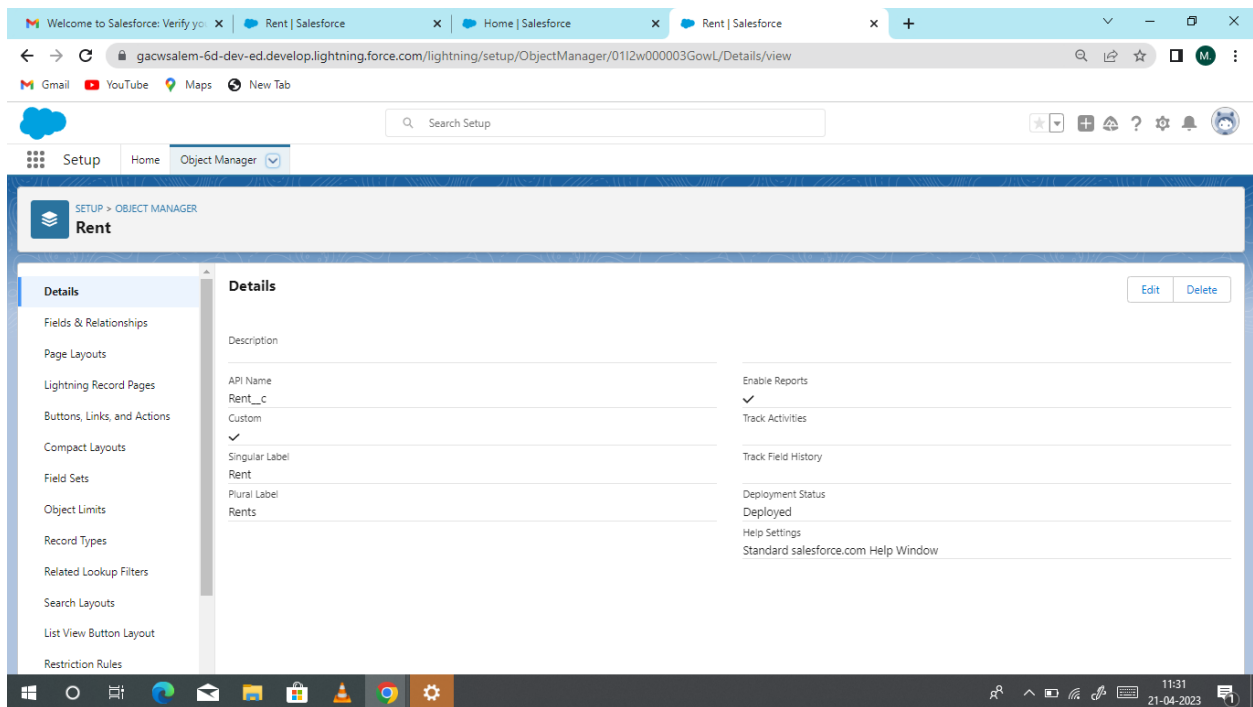
The screenshot shows the Salesforce Setup interface for the 'Buy' object. The browser address bar displays the URL: `gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GowG/Details/view`. The page title is 'SETUP > OBJECT MANAGER Buy'. The left sidebar contains a 'Details' section with a list of configuration options: 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, and Restriction Rules. The main content area, also titled 'Details', shows the following configuration details:

Field	Value
Description	
API Name	Buy__c
Custom	✓
Singular Label	Buy
Plural Label	Buyers
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 11:31 on 21-04-2023.

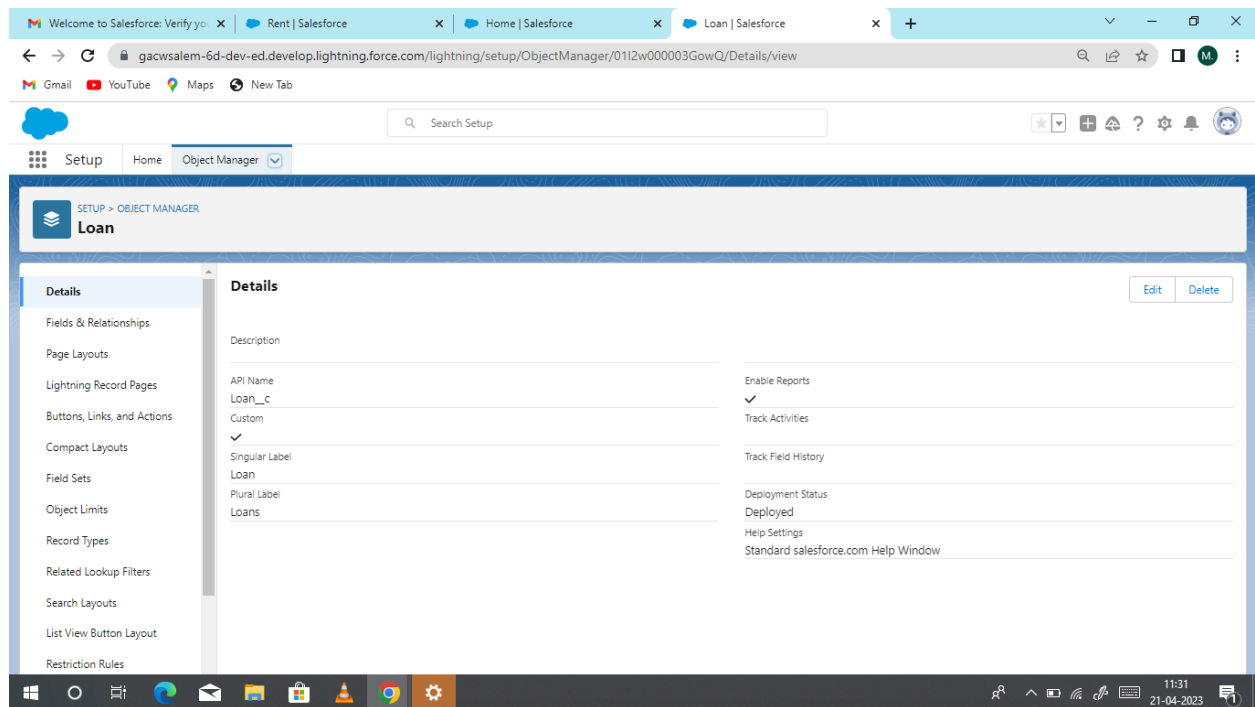
ACTIVITY:

Create Field For Rent:



ACTIVITY:

Create Field F or Loan:



Milestone 6:Profile

ACTIVITY:

To create a new profile:

Profile management

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](#) | [Enabled Apex Class Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	management		
User License	Analytics Cloud Integration User	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	pavithra.gavithra	21/04/2023, 7:47 am	Modified By: gavithra.gavithra, 21/04/2023, 7:47 am

Page Layouts

Standard Object Layouts	Global	Object Milestone	Object Milestone Layout
Email Application	Not Assigned	Operating Hours	Operating Hours Layout
Home Page Layout	Home Page Default	Opportunity	Opportunity Layout
Account	Account Layout	Opportunity Product	Opportunity Product Layout
Alternative Payment Method	Alternative Payment Method Layout	Order	Order Layout
Appointment Invitation	Appointment Invitation Layout	Order Product	Order Product Layout

Milestone 7: New User

ACTIVITY:

Create User:

Web browser window showing the Salesforce Setup page for managing users. The URL is `gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home`.

The page title is "Setup Users". The left sidebar shows the navigation menu with "Users" selected. The main content area displays "All Users" and provides instructions on how to create, view, and manage users.

The "All Users" section includes a search bar, a "View" dropdown (set to "All Users"), and links for "Edit" and "Create New View". Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rjthueah_sbtYlaf4grei@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Muthuvel Pavithra	pmuth	m.pavithra5445@gmail.com		<input checked="" type="checkbox"/>	Identity User
<input type="checkbox"/> Edit	pavithra .pavithra	ppavi	pavi@physics.com		<input checked="" type="checkbox"/>	System Administrator

Web browser window showing the Salesforce Setup page for creating a new user. The URL is `gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOverrid...`.

The page title is "Setup Users". The left sidebar shows the navigation menu with "Users" selected. The main content area displays "New User" and provides instructions on how to create a new user.

The "New User" section includes a "User Edit" form with fields for First Name, Last Name, Alias, Email, Username, Nickname, Role, User License, Profile, Active, Marketing User, and Offline User. The "Save" button is highlighted.

Milestone 8: Permission Set

ACTIVITY:

Create the Permissions Sets:

The screenshot shows the Salesforce Setup interface in a web browser. The browser's address bar displays the URL: `gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp`. The Salesforce Setup navigation bar is visible, with tabs for Setup, Home, and Object Manager. The left sidebar contains a search bar and a list of navigation items: Lightning Experience Transition Assistant, Users, Permission Set Groups, Permission Sets (highlighted), Feature Settings, Digital Experiences, Settings, Functions, Sales, Accounts, and Person Accounts. The main content area is titled 'Permission Sets' and 'Create'. It includes a 'Save' button and a 'Cancel' button. Below these is a section titled 'Enter permission set information' with a legend indicating that a red bar denotes required information. The form fields are: 'Label' with the value 'save', 'API Name' with the value 'save', and 'Description' which is empty. At the bottom, there is a checkbox for 'Session Activation Required' which is currently unchecked.

Milestone 9: Setup For OWD

ACTIVITY:

Create OWD Setting:

W | Hc | Hc | Nr | Ta | Ar | Ol | Ol | Ol | Us | Pe | Ta | Ar | Ol | Pr | Hc | Pr | Ol | Pr | Pe

gacwsalem-6d-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Gmail YouTube Maps New Tab

Search Setup

Setup Home Object Manager

shari

Security

Sharing Settings

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

Sharing Settings

Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓

Milestone 10 :Repts

ACTIVITY:

Create Reports:

W | Hc | Hc | Nr | Ol | x | Ol | Ol | Us | Pe | Ta | Af | Ol | Pr | Hc | Pr | Ol | Pr | Pe | St | Ol | + | - | X

gacwsalem-6d-dev-ed.develop.lightning.force.com/one/app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXiiLCJhdHRyaWJ1dGVzIjp7InJlY29yZEIk...

Gmail YouTube Maps New Tab

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Reports More

Create Report

Category
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders

Select a Report Type

Recently Used Report Types

Report Type Name	Category
Buyers	Standard

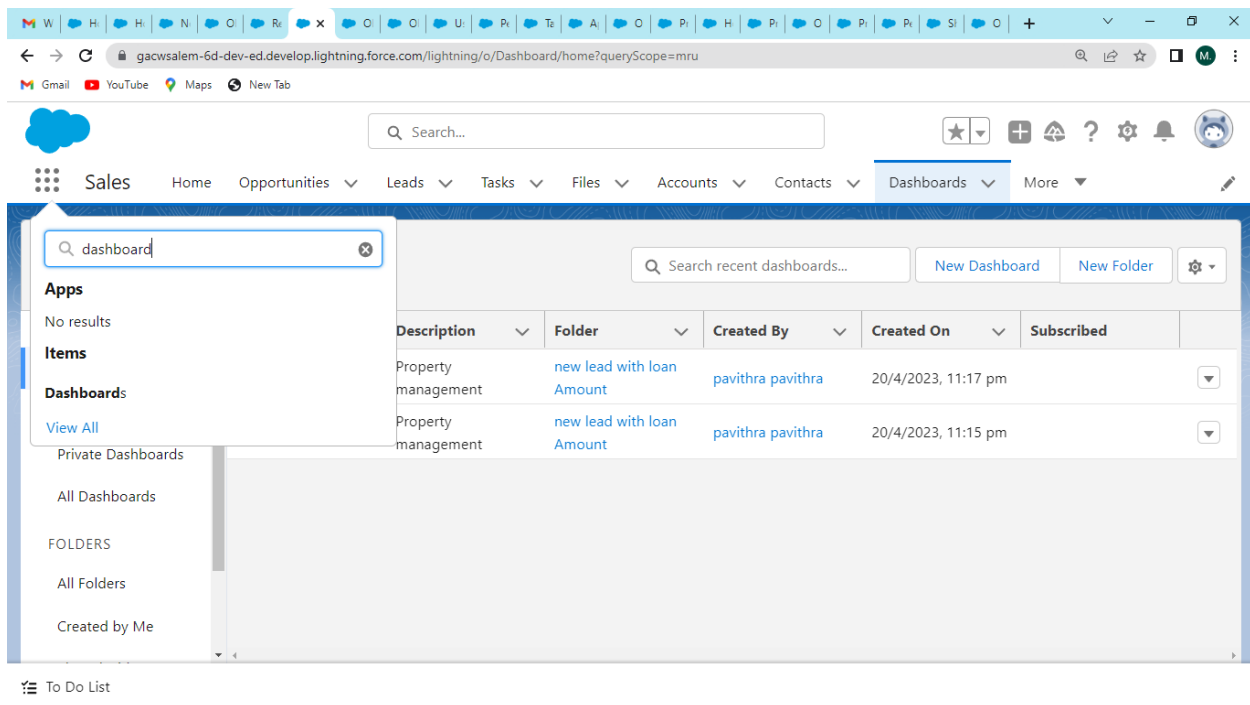
Details
 Buyers
Standard Rep
[Start Report](#)
Details

To Do List

Milestone 11: Dashboards

ACTIVITY:

Create dashboards:



4. TRAILHEAD PROFILE PUBFILE URL

- Team Lead : <https://trailblazer.me/id/mpavithra10>
- Team Member 1: <https://trailblazer.me/id/ddpavithra282>
- Team Member 2: <https://trailblazer.me/id/rangitha852003>
- Team Member 3: <https://trailblazer.me/id/nivetha151>

5. ADVANTAGES

- Long-term tenants.
- More efficient rent collection.
- Lower repair and maintenance costs.

DISADVANTAGE

- Loss of control.
- Expense.
- Finding a reliable property manager.

6 . APPLICATION

- *A property management system (PMS) is a software application for the operations of hospitality accommodation and commercial residential rental properties*
- *PMS is also used in manufacturing industries , local government and manufacturing*

7. CONCLUSION

- *Property management System (PMS) software is very crucial for all the hostels*
- *Especially opera PMS constitutes the most appropriate PMS software for Hilton Athen .it is user friendly connects with central Reservations System (CRS),point of sale (POS) etc.*
- *Provides all the tools the hotel needs in order to operate effectivity*

8.FUTURE SCOPE

- *Property management deals with the management of personal, commercial or industrial real estate*
The growing population, overall growth of the country, rising income levels and increased foreign investment has led to a heightened need for improved infrastructure across urban, semi-urban and rural India.