

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1.1 INTRODUCTION

1.1 Overview

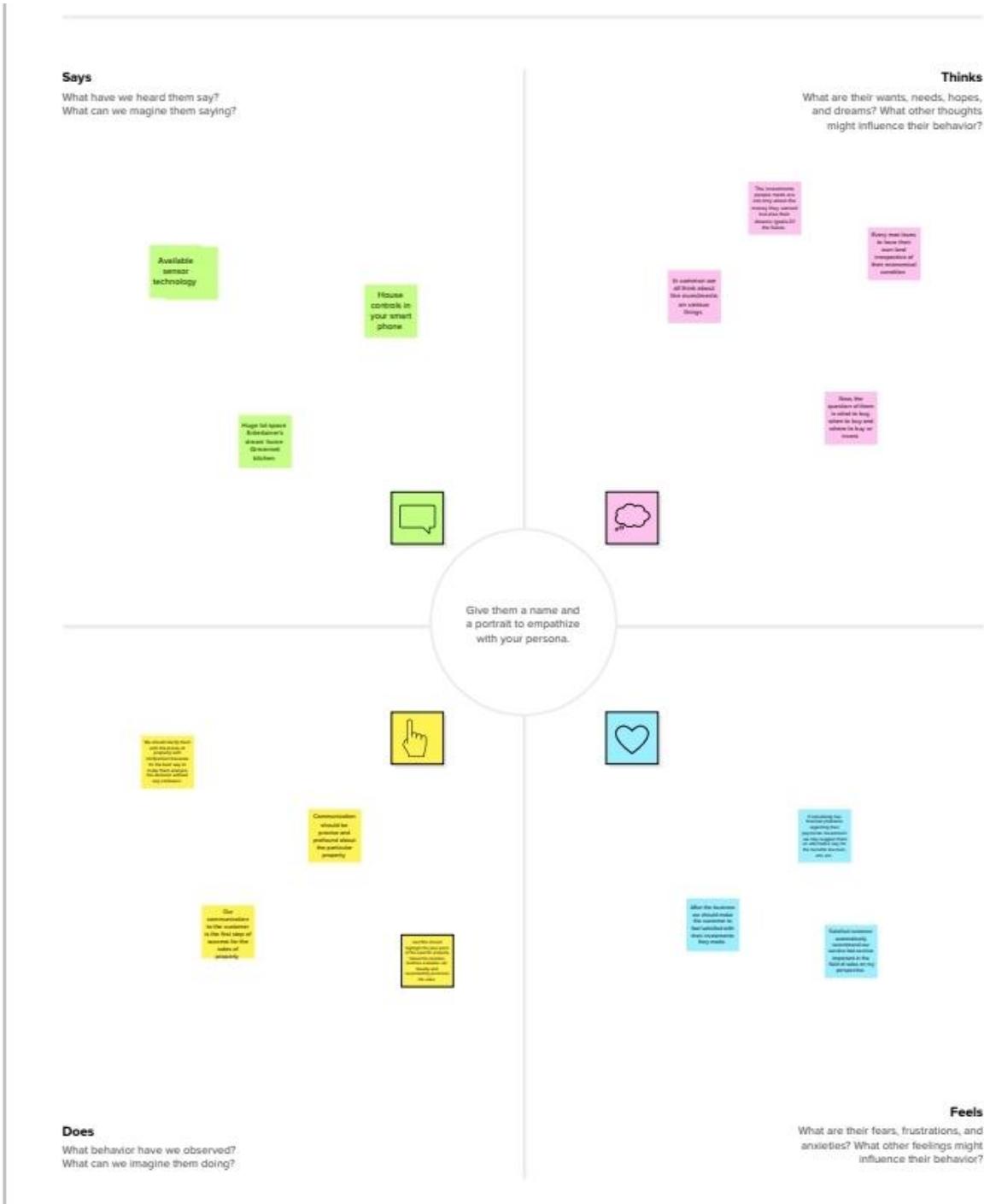
Property management is the supervision of residential, commercial, and industrial properties, including apartments, detached houses, condominium units and shopping centres. It typically involves administrating property owned by another party or entity.

1.2 Aim

Marketing is a powerful tool for property management businesses, offering the potential to reach a wider audience and generate more leads.

2. Problem Definition& Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstroming Map

2

Brainstorm

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

⌚ 10 minutes

TIP

You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

Person 1

Consider their skills	Reflect on their experience	their education background
their ability to succeed	candidates' professional experiences	candidate's ability

Person 2

candidate's demands	Making a successful	Consider personality
Verify references	verify the information	

Person 3

the right candidate	Be genuine and practical	Live honestly

Person 4

Managing time	Create a recruiting pipeline board	Responsibilities
Qualifications	Benefits	

Person 5

Their annual percentage	their background	their trust

Person 6

Person 7

Person 8

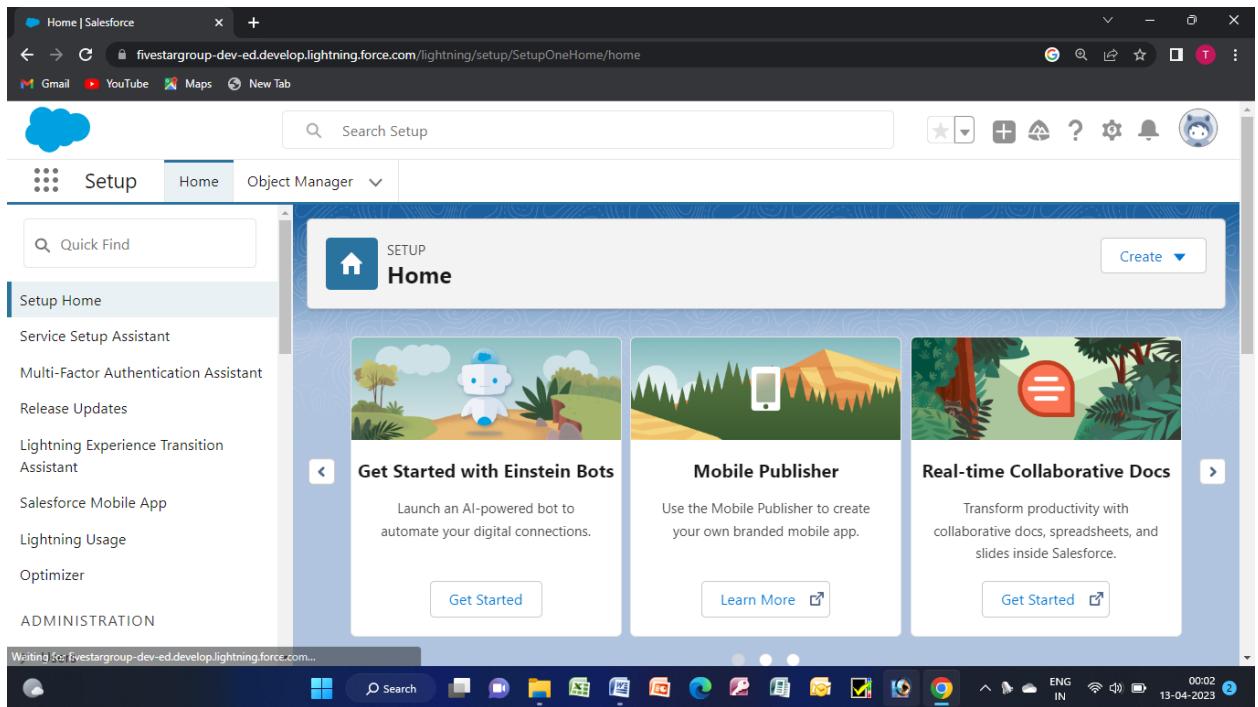
3 RESULT

3.1 Data Model:

Object name	Fields in the Object	
Lead	Filed lable	Data type
	Lead	AutoNumber
	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
Buy	Field lable	Data type
	Creat Filed for Buy	Text
	Creat Property Type	Picklist
	Discount	Filed Data
	State	Picklist
	City	Dependancy
	Annual Amount To Be Paid	Currency
Rent	Feld lable	Data type
	Rent	Auto Number
	Rental City	Text
	BHK type	Picklist
Loan	Filed lable	Data type
	Loan Id	Auto number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total Loan Instalments	Number
	Loan Repayment	Number
	Loan Amoun	Formula

3.2 Activity & Screenshot

Milestone 1-Salesforce



MILESTONE 2-Object

1.Lead

The screenshot shows the Salesforce Setup interface with the URL fivestargroup-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w0000040pwC/Details/view. The page title is "Lead | Salesforce". The main content area displays the "Object Manager" details for the "Lead" object. The "Details" tab is selected. The "Description" field contains "Huge lot space Primere house". The "API Name" field is "Lead_c". The "Custom" checkbox is checked. The "Singular Label" field is "Lead" and the "Plural Label" field is "Leads". On the right side, under "Enable Reports", the "Track Activities" and "Track Field History" checkboxes are checked. Under "Deployment Status", it says "Deployed". The bottom status bar shows the date as 13-04-2023.

2.BUY

The screenshot shows the Salesforce Setup interface with the URL fivestargroup-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w0000040BL/Details/view. The page title is "Buy | Salesforce". The main content area displays the "Object Manager" details for the "Buy" object. The "Details" tab is selected. The "Description" field contains "Common peoples, vip". The "API Name" field is "Buy_c". The "Custom" checkbox is checked. The "Singular Label" field is "Buy" and the "Plural Label" field is "Buyers". On the right side, under "Enable Reports", the "Track Activities" and "Track Field History" checkboxes are checked. Under "Deployment Status", it says "Deployed". The bottom status bar shows the date as 13-04-2023.

3.Rent

The screenshot shows the Salesforce Setup interface for managing the Rent object. The top navigation bar includes links for Home and Object Manager. The main content area displays the 'Details' section for the Rent object. Key configuration settings shown include:

- Common peoples,** which is the label for the Rent object.
- 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

4.Loan

The screenshot shows the Salesforce Setup interface with the URL fivestargroup-dev-ed.lightning.force.com/lightning/setup/ObjectManager/012w0000040l5b/Details/view. The page title is "Loan | Salesforce". The top navigation bar includes "Setup", "Home", and "Object Manager". The main content area is titled "SETUP > OBJECT MANAGER" and "Loan". The left sidebar lists "Details", "Fields & Relationships", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", and "Field Sets". The main panel displays the following details for the Loan object:

Description	Middle class
API Name	Loan_c
Custom	✓
Singular Label	Loan
Plural Label	Loans

On the right side, there are sections for "Enable Reports" (✓), "Track Activities", "Track Field History", "Deployment Status" (Deployed), and "Help Settings". The status bar at the bottom shows the date as 13-04-2023.

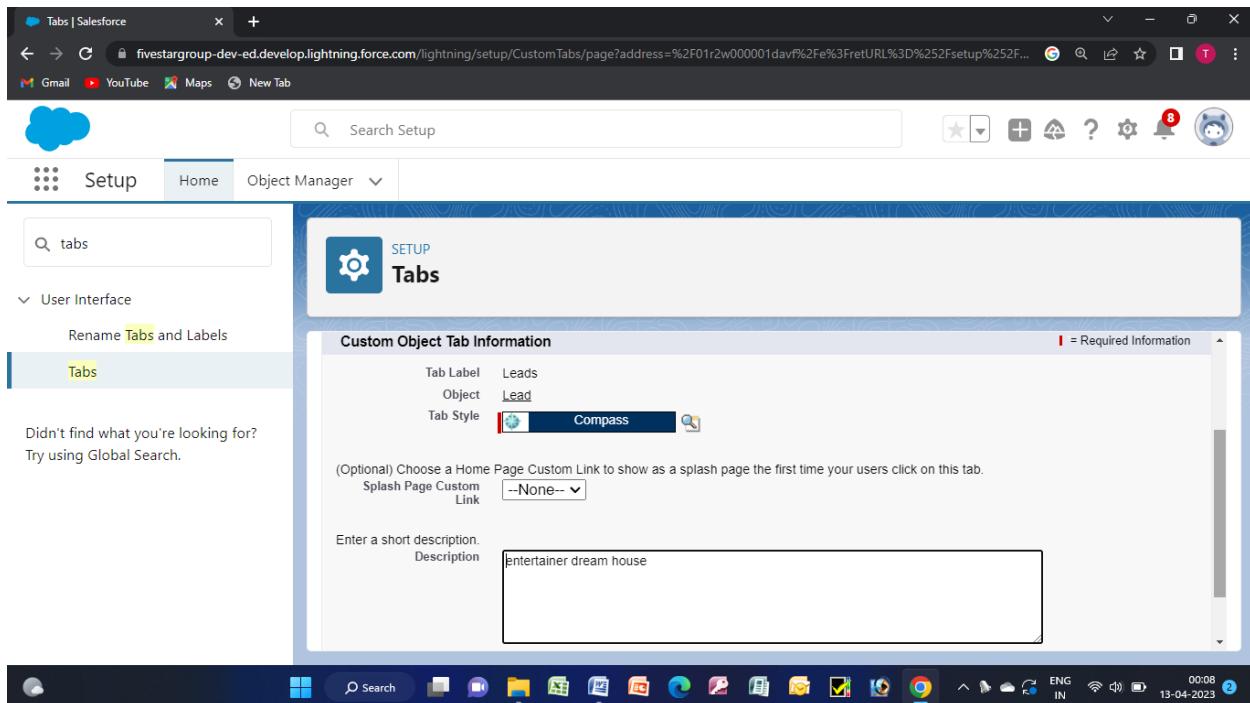
MILESTONE 3-Tab

The screenshot shows the Salesforce Setup interface with the URL fivestargroup-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home. The page title is "Tabs | Salesforce". The top navigation bar includes "Setup", "Home", and "Object Manager". The left sidebar lists "User Interface" and "Rename Tabs and Labels". The main content area is titled "SETUP > TABS" and "Tabs". The left sidebar has a search bar and a link to "Tabs". The main panel displays the "Custom Object Tabs" section with the following data:

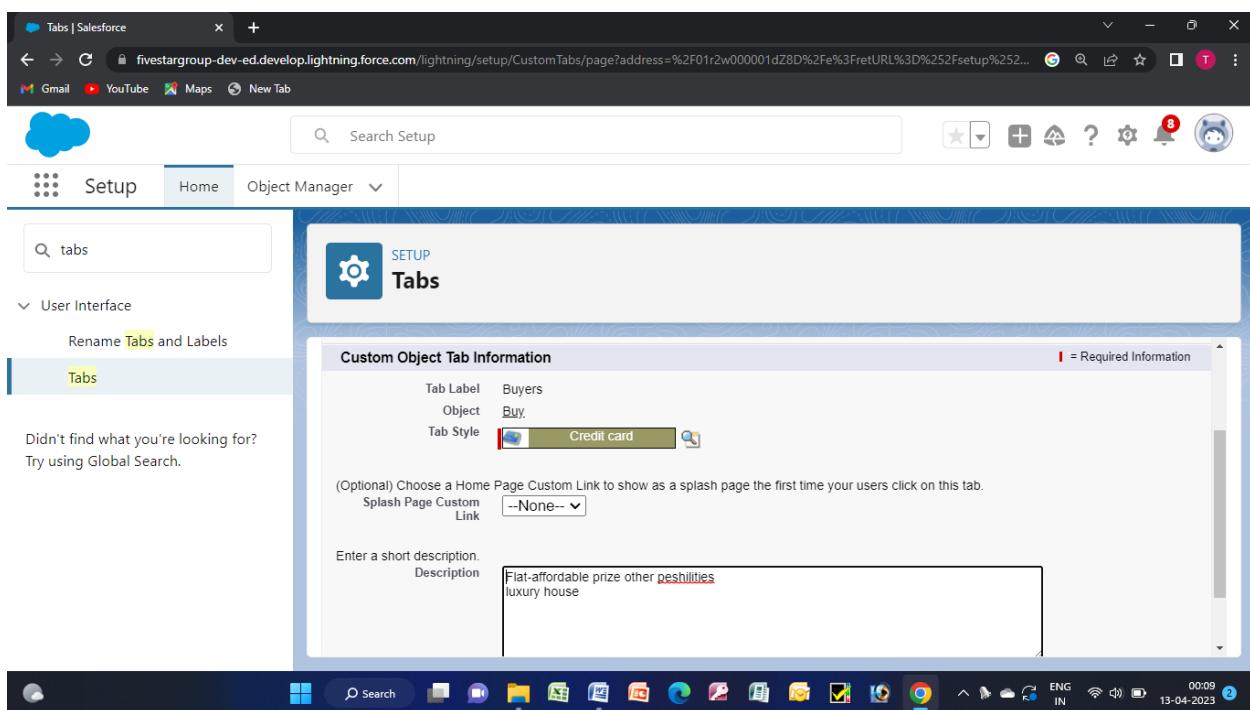
Action	Label	Tab Style	Description
Edit Del	Buyers	Credit card	Flat-affordable prize other pessibilities luxury house
Edit Del	Leads	Compass	entertainer dream house
Edit Del	Loans	Bank	home loans starting at 8.20% Rate of interest
Edit Del	Rents	Building	close to zero maintenance work

Below this is the "Web Tabs" section, which states "No Web Tabs have been defined". The status bar at the bottom shows the date as 13-04-2023.

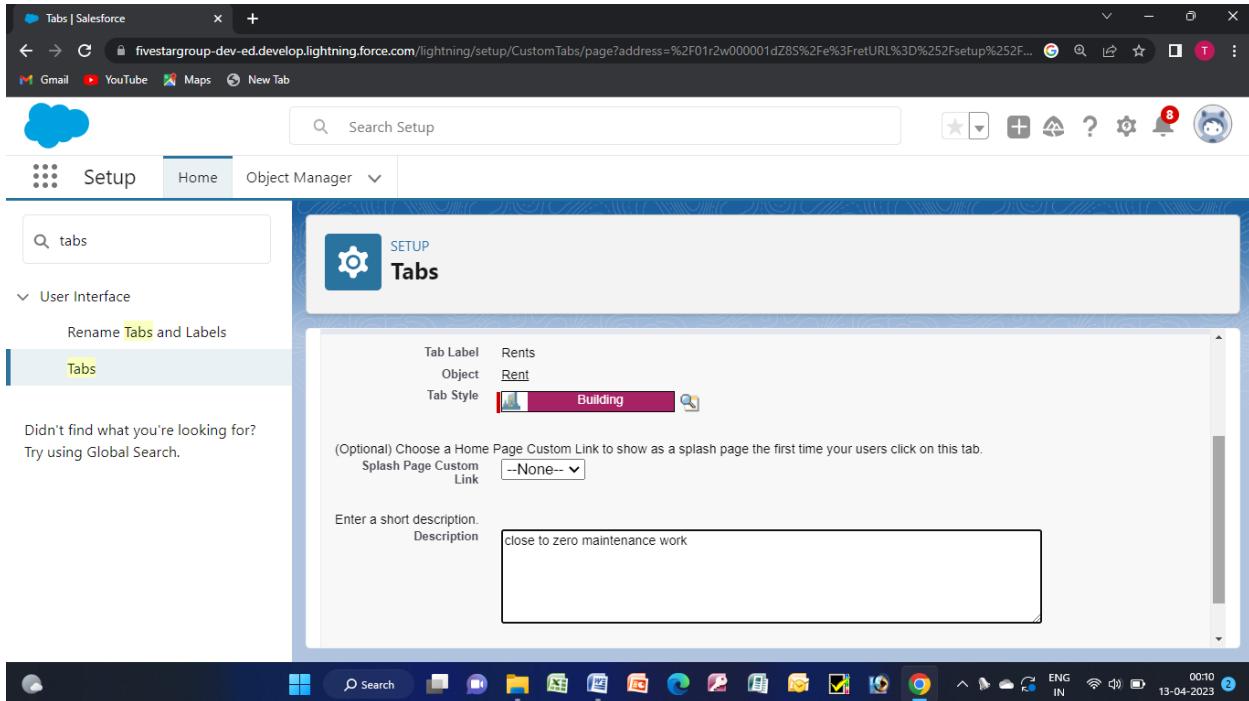
1.lead



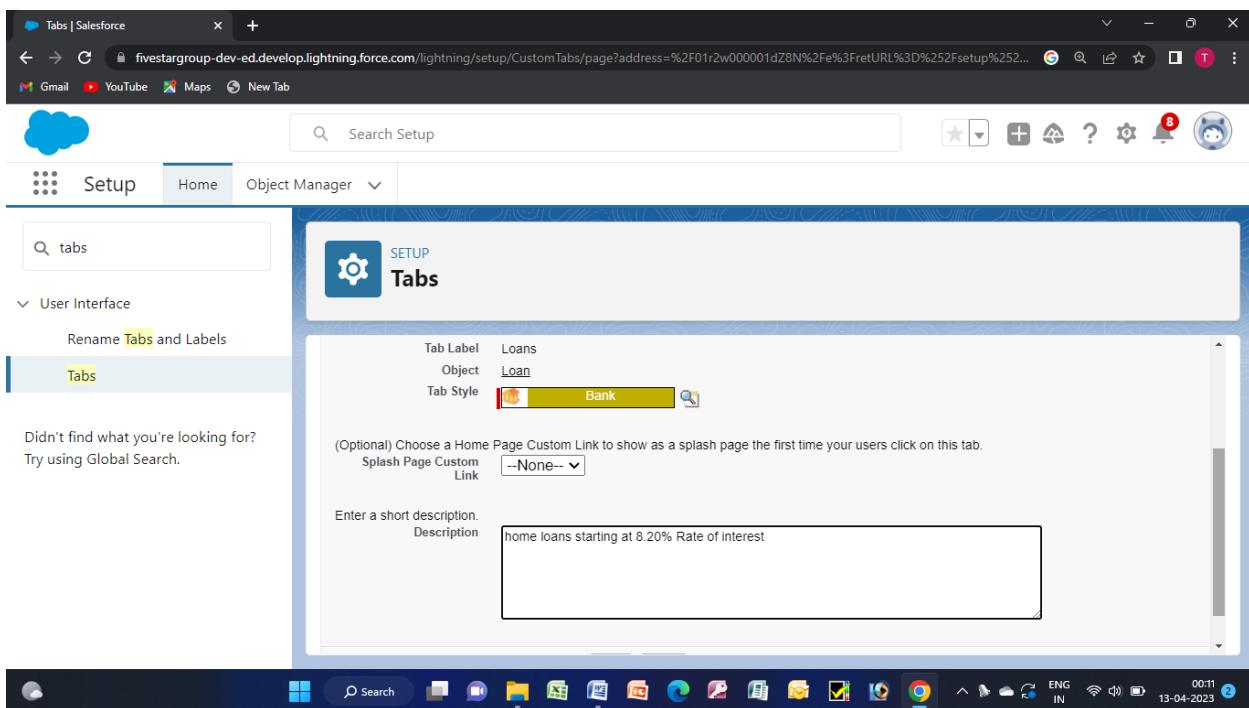
2.Buy



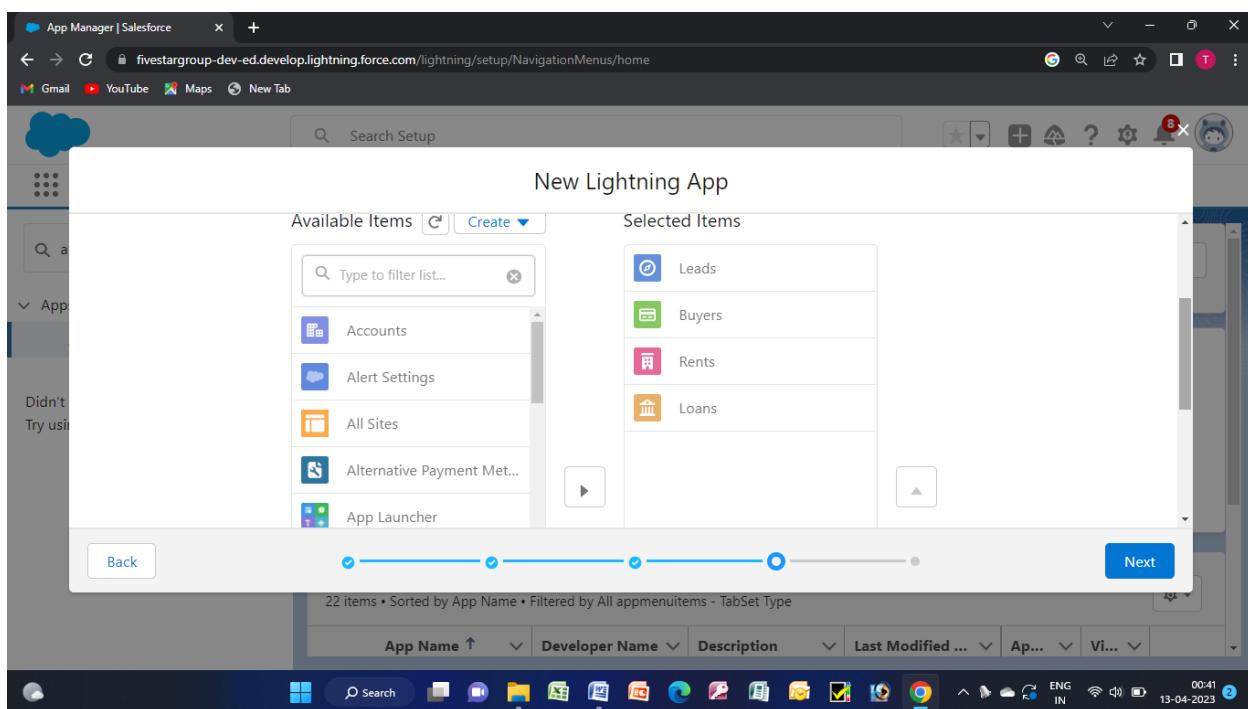
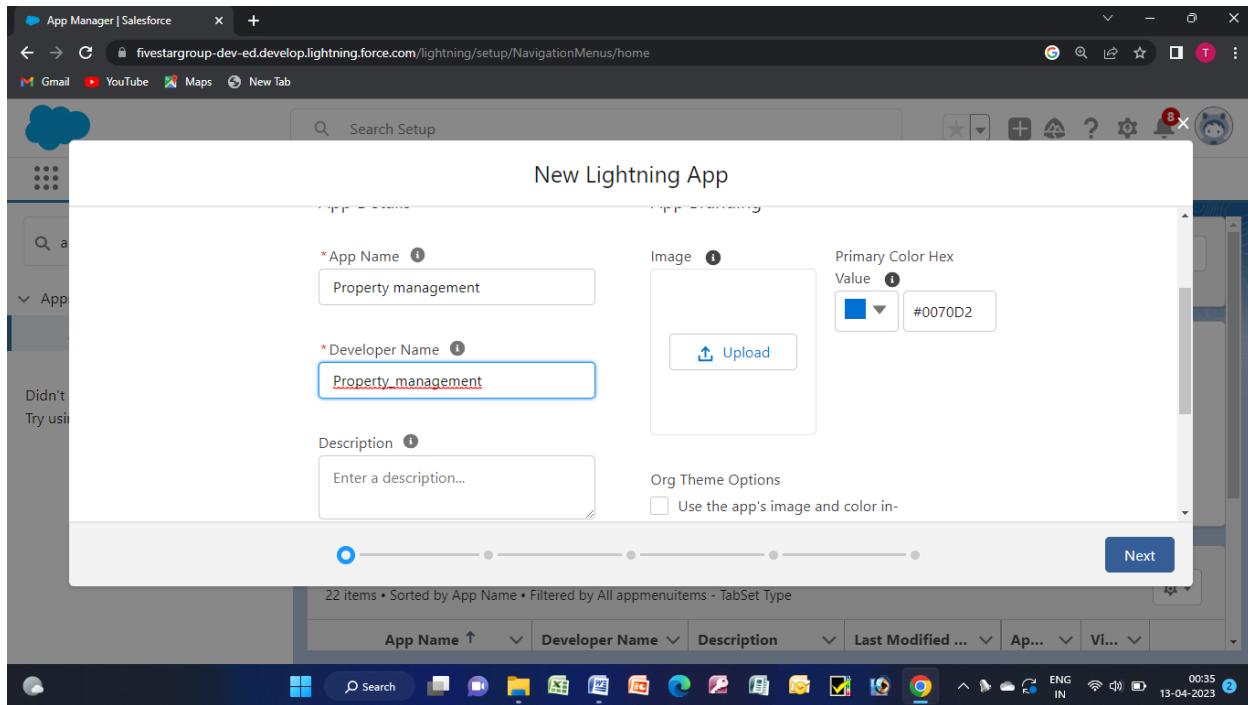
3.Rent

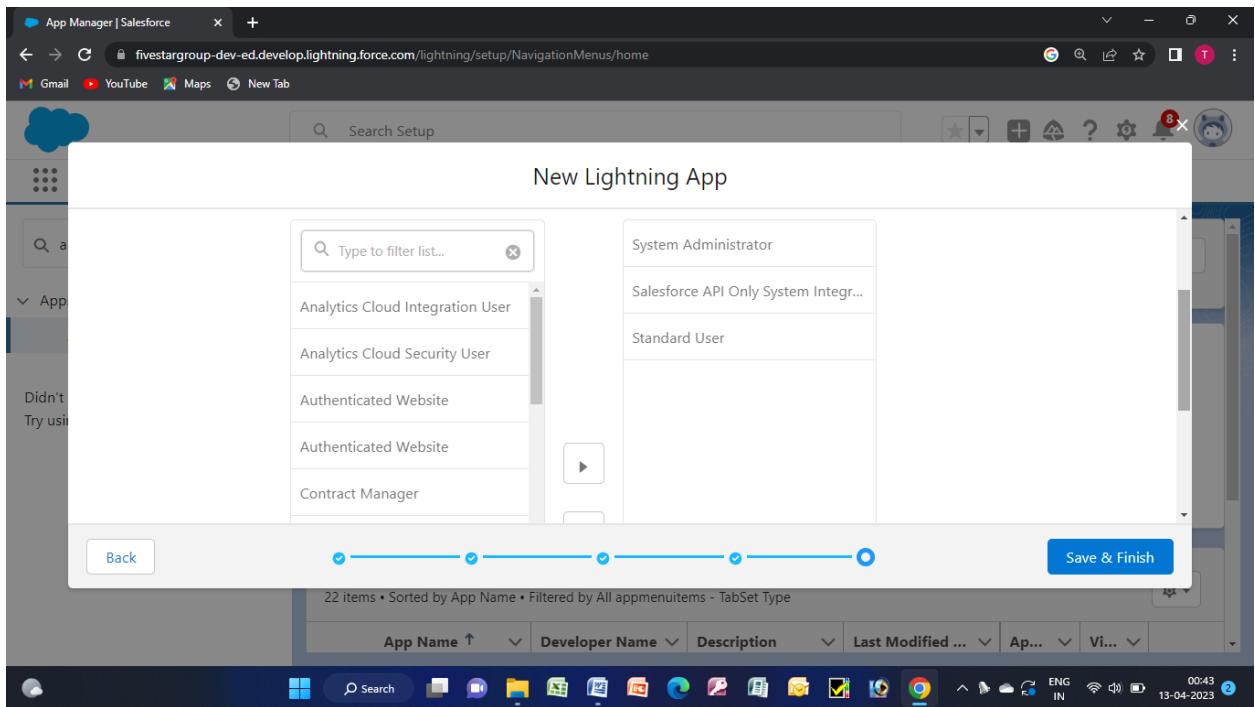


4.Loan



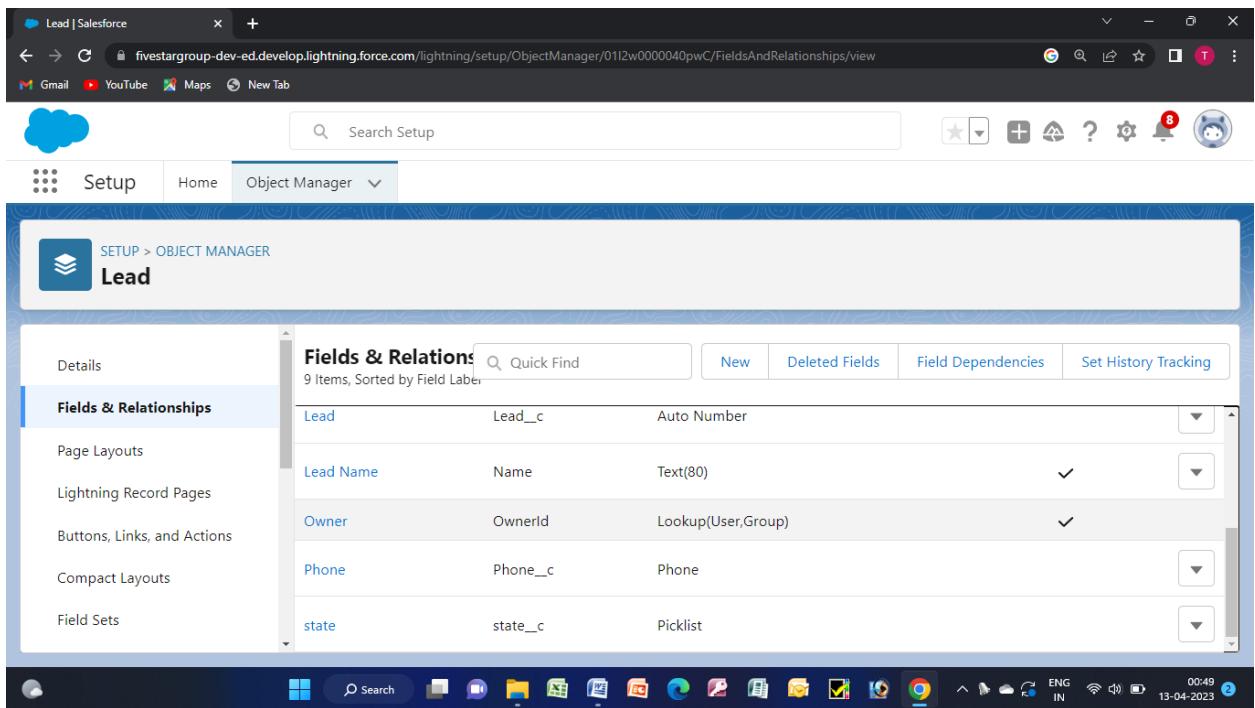
MILSTONE 4-The Lighting App





MILESTONE 5 : Fields

Lead



Lead | Salesforce

fivestargroup-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw0000040pwC/FieldsAndRelationships/editDependency?controller=0...

Setup Home Object Manager

Search Setup

Cloud icon

8 notifications

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Controlling Field state
Dependent Field City

Save Cancel Preview

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

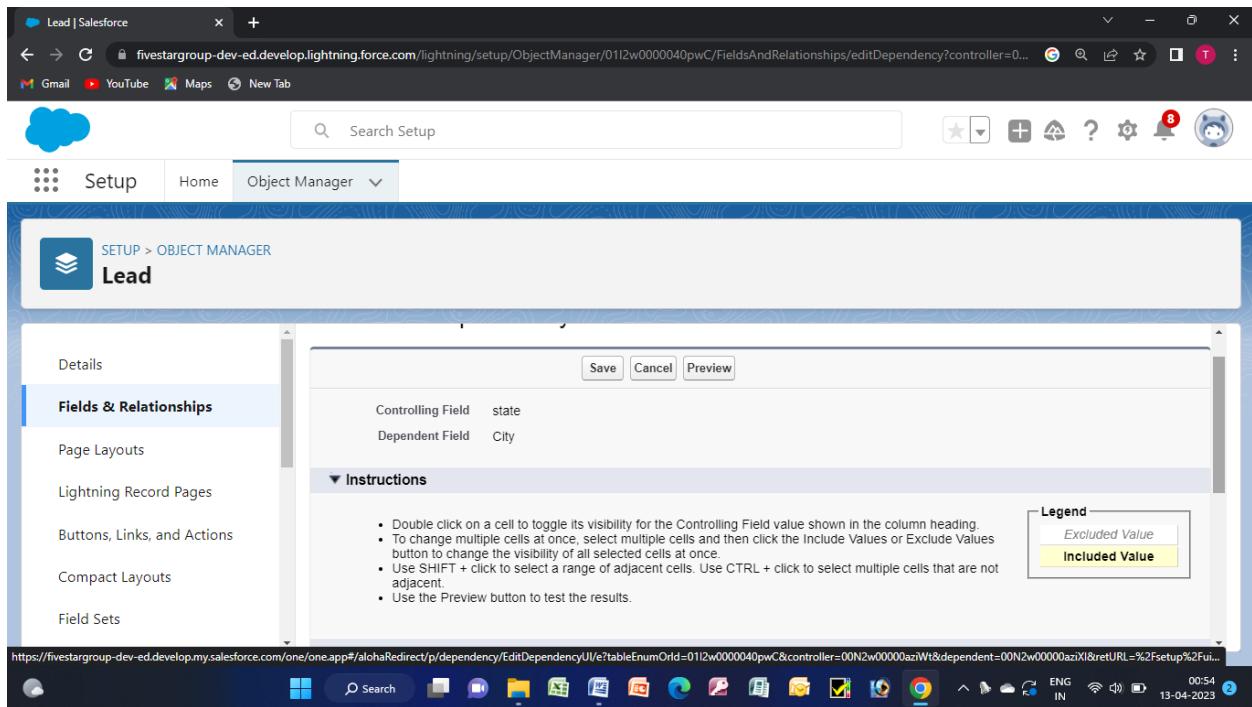
Legend

Excluded Value

Included Value

https://fivestargroup-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/p/dependency/EditDependencyUI/e?tableEnumOrId=01Iw0000040pwC&controller=00N2w00000azWt8&dependent=00N2w00000azIxI&retURL=%2Fsetup%2Fui...

00:54 IN 13-04-2023



2 .Buy

Buy | Salesforce

fivestargroup-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw0000040j3L/FieldsAndRelationships/view

Setup Home Object Manager

Search Setup

Cloud icon

8 notifications

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

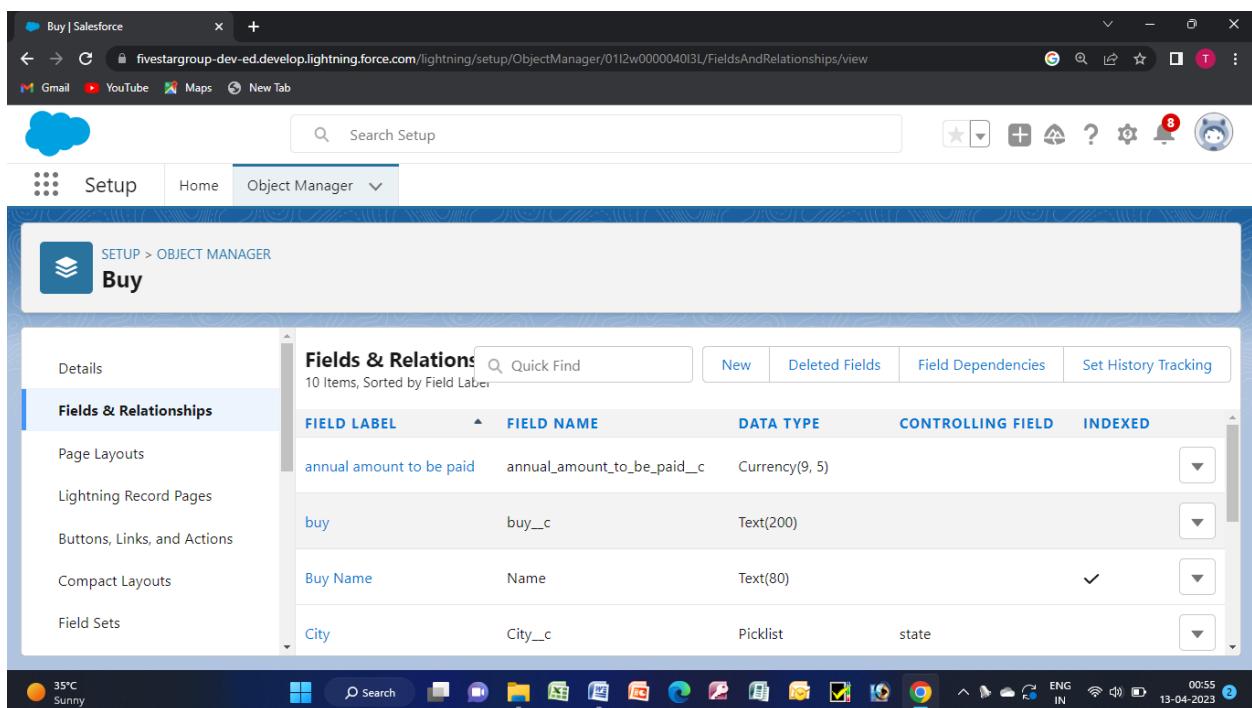
Fields & Relations Quick Find 10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
annual amount to be paid	annual_amount_to_be_paid_c	Currency(9, 5)		
buy	buy_c	Text(200)		
Buy Name	Name	Text(80)		
City	City_c	Picklist	state	

New Deleted Fields Field Dependencies Set History Tracking

35°C Sunny

00:55 IN 13-04-2023



Buy | Salesforce

fivestargroup-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw000004013L/FieldsAndRelationships/editDependency?controller=00...

Gmail YouTube Maps New Tab

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Buy

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

state:	Maharashtra	Gujarat	Rajasthan	Tamil Nadu
City:	Mumbai	Mumbai	Mumbai	Mumbai
	Pune	Pune	Pune	Pune
	Chennai	Chennai	Chennai	Chennai
	Hyderabad	Hyderabad	Hyderabad	Hyderabad

Showing Columns: 1 - 4 (of 4) < Previous | Next > View All Go to

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

state:	Maharashtra	Gujarat	Rajasthan	Tamil Nadu
City:	Mumbai	Mumbai	Mumbai	Mumbai
	Pune	Pune	Pune	Pune
	Chennai	Chennai	Chennai	Chennai
	Hyderabad	Hyderabad	Hyderabad	Hyderabad

Showing Columns: 1 - 4 (of 4) < Previous | Next > View All

35°C Sunny

Search

ENG IN 00:56 13-04-2023

3 .Rent

Rent | Salesforce

fivestargroup-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw000004014x/FieldsAndRelationships/view

Gmail YouTube Maps New Tab

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Rent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK	B__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
rent	rent__c	Auto Number		

35°C Sunny

Search

ENG IN 00:57 13-04-2023

4 .Loan

The screenshot shows the Salesforce Object Manager interface for the 'Loan' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main content area is titled 'Fields & Relations' and displays a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
annual loan	annual_loan__c	Number(8, 4)		
Created By	CreatedById	Lookup(User)		
interest rate	interest_rate__c	Currency(8, 3)		
Last Modified By	LastModifiedById	Lookup(User)		

MILESTONE 6 – Profile

The screenshot shows the Enhanced Profiles page in the Salesforce Setup. The left sidebar has a search bar and categories: Users (selected) and Profiles. The main content area is titled 'Profiles' and shows a table of profiles. The table has columns for Action, Profile Name (sorted), User License, and Custom. The profiles listed are:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>

Custom Object Permission

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

- Page Header:** Profiles | Salesforce
- Search Bar:** Search Setup
- Navigation:** Setup (selected), Home, Object Manager
- Left Sidebar:** Users, Profiles (selected)
- Middle Content:** **Profiles** page under SETUP.
- Custom Object Permissions:** A grid showing permissions for various objects (Individuals, Invoices, Leads, Work Types, Work Type Groups) across different profiles (Buyers, Leads, Loans, Rents).

Object	Buyers					Loans					Rents								
	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>	
Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Type Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- Bottom Status Bar:** javascript:srcUp(%27%2F00e2w000005dPYz%2Fe%3FretURL%3D%252F00e%253Fcfc%253D0082w00000:02p%2526rolodexIndex%253D-1%2526page%253D2%2526isdp%253Dp1%26isdp%3Dp1%27);, 35°C Sunny, Search, File, Home, Recent, ENG IN, 01:06, 13-04-2023

MILSTONE 7 – New User

The screenshot shows the Salesforce Setup interface. On the left, a sidebar lists various setup categories: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The 'Users' category is currently selected. In the main content area, a 'User Edit' form is open with the title 'SETUP Users'. The 'General Information' section contains the following fields:

First Name	Radhi	Role	<None Specified>
Last Name	meena	User License	Force.com - Free
Alias	rmeen	Profile	Force.com - Free User
Email	rathimeenan@gmail.com	Active	<input checked="" type="checkbox"/>
Username	rathimeenan@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User168127806967422414	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>

At the bottom of the page, there are buttons for 'Save', 'Save & New', and 'Cancel'. The status bar at the bottom right shows the date and time as 13-04-2023 01:09.

MILESTONE 8- Permission set

The screenshot shows the Salesforce Setup interface. On the left, a sidebar lists categories: Permission Set Groups, **Permission Sets**, Custom Code, and Custom Permissions. The 'Permission Sets' category is currently selected. In the main content area, a 'Permission Sets' page is displayed with the title 'SETUP Permission Sets'. The page includes a 'Help for this Page' link and a note: 'On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)'. Below this is a table titled 'All Permission Sets' with the following data:

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buver	Allows access to the store. Lets users s... B2B Buver Permission Set One Seat	

At the bottom of the page, there are buttons for 'Edit', 'Delete', and 'Create New View'. The status bar at the bottom right shows the date and time as 13-04-2023 01:12.

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The left sidebar has a search bar with 'perm' typed in. Under 'Users', 'Permission Set Groups' and 'Permission Sets' are listed under 'Permission Sets'. Under 'Custom Code', 'Custom Permissions' is listed. A message says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Permission Sets' and contains a table of permission sets. The table has columns for Action, Permission Set Label (sorted by Description), Description, and License. One row is visible: 'buy' under 'Description'. The table footer shows '26-30 of 30' rows and '0 Selected'. The top right of the content area has a 'Help for this Page' link. The bottom right shows 'Page 2 of 2'. The system status bar at the bottom indicates it's 01:13, ENG IN, and the date is 13-04-2023.

MILESTONE 9 – Setup For OWD

The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar has a search bar with 'Sharin' typed in. Under 'Security', 'Sharing Settings' is listed under 'Sharing Settings'. A message says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Sharing Settings' and contains three sections: 'Sharing Rules', 'Lead Sharing Rules', and 'Account Sharing Rules', followed by 'Opportunity Sharing Rules'. Each section has a 'New' button and a 'Recalculate' button. The 'Sharing Rules' section notes 'No sharing rules specified.' The 'Lead Sharing Rules' section notes 'No sharing rules specified.' The 'Account Sharing Rules' section notes 'No sharing rules specified.' The 'Opportunity Sharing Rules' section notes 'No sharing rules specified.' The top right of the content area has a 'Lead Sharing Rules Help' link. The bottom right shows 'Opportunity Sharing Rules Help' and the date '13-04-2023'. The system status bar at the bottom indicates it's 01:19, ENG IN, and the date is 13-04-2023.

MILESTONE 10 – Report

The screenshot shows the Salesforce Report Builder interface. A modal window titled "Create Report" is open, prompting the user to "Select a Report Type". On the left, there's a sidebar with categories like "Recently Used" and "All". The "All" category is expanded, showing report types such as Accounts, Opportunities, Customer Support Reports, Leads, Campaigns, and Activities. To the right, a list of report types is displayed with their respective categories and standard status.

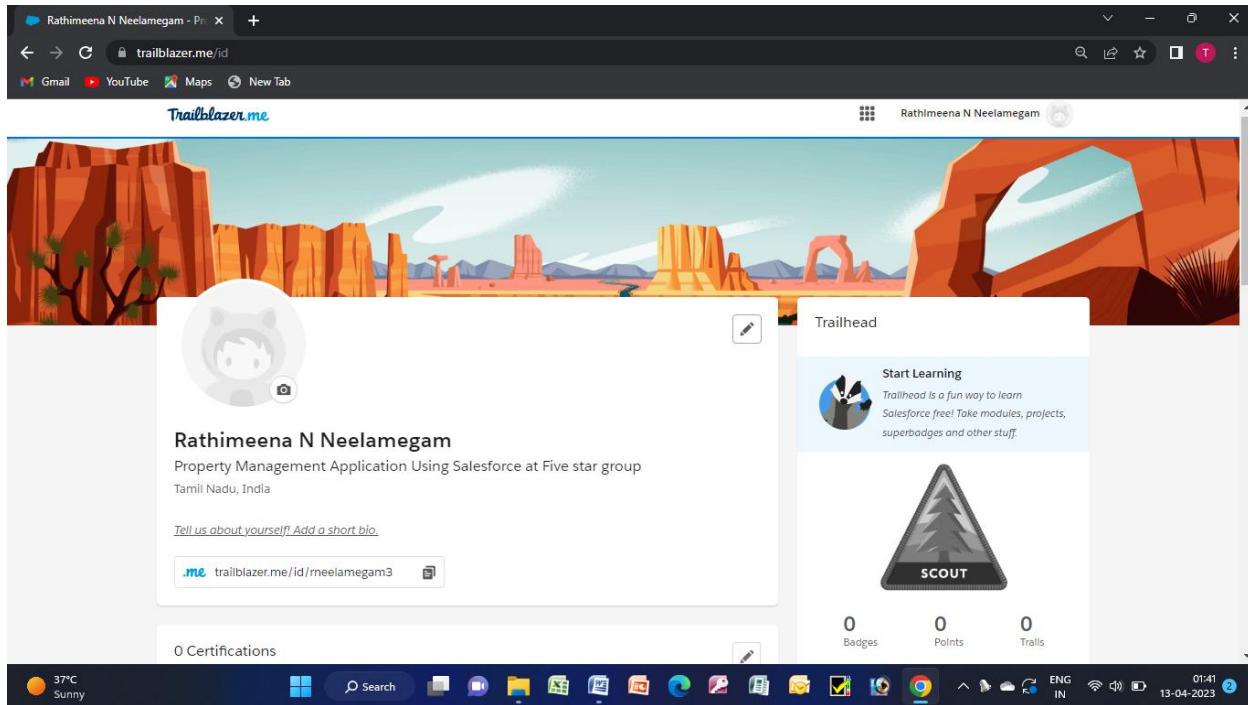
Report Type Name	Category	Status
Accounts	Standard	Standard
Contacts & Accounts	Standard	Standard
Accounts with Partners	Standard	Standard
Account with Account Teams	Standard	Standard
Accounts with Contact Roles	Standard	Standard
Accounts with Assets	Standard	Standard

Report Condition

The screenshot shows the Salesforce Reports page. On the left, a sidebar lists sections like "Recent", "Created by Me", "Private Reports", "Public Reports", and "All Reports". The main area displays a table of recent reports, including "New Loans Report" and "New Rents Report", both created by Rathimeena N Neelamegam on 12/4/2023.

Report Name	Folder	Created By	Created On
New Loans Report	Private Reports	Rathimeena N Neelamegam	12/4/2023, 12:31 pm
New Rents Report	Private Reports	Rathimeena N Neelamegam	12/4/2023, 12:32 pm

MILESTONE 11 – Dashboard



4. Trailhead Profile Public URL

Team Lead : <https://trailblazer.me/id/rneelamegam3>

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

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

Team Member 3 : <https://trailblazer.me/id/sramalingam34>

Team Member 4 : <https://trailblazer.me/id/vvilvanathan>

5. ADVANTAGES:

- The biggest benefit of having a property managed is definitely The peace of mind it gives the owner .

- One of the most common mistakes that landlords make is ignoring the possibility of hiring a property management company.

DISADVANTAGES :

- If you are the kind of property owner who wants to have total control over every aspect of your business hiring a property manager is certainly not the best call for you.

APPLICATION :

- A property management system is a software application for the operations of hospitality accommodations and commercial residential rental properties.

CONCLUSION:

- The applied language technologies should be encouraged to efficient service .
- Home is dream for every one.

FUTURE SCOPE

- Improve relationship with property owners
- Faster maintenance and instant update
- Patience and flexibilty

