PROPERTY MANAGEMENT APPLICATION
USING SALESFORCE

<u>INTRODUCTION</u>:

1.1 Overview

Salesforce property management enables the realty managers to keep track of crucial data about financial and house hold properties incorporating associated cash flow, primary tenants, and occupancy rates.

PROS & CONS OF CUSTOMISING SALESGORCE FOR PROPERTY MANAGEMENT NEEDS:

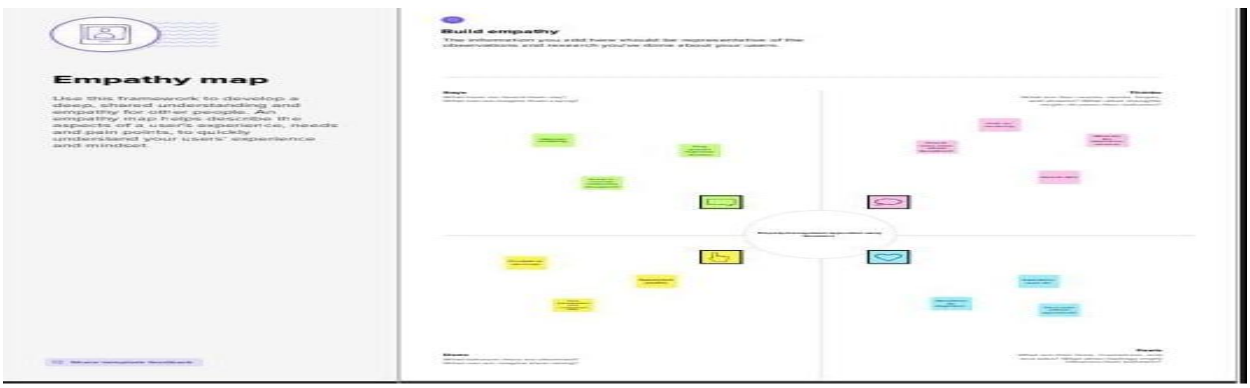
The key advantage of salesforce is its huge infrastructure of consulting partners that specialize in CRM customization. There are over 1,700 certified consultants listed on AppExchange and thousands of freelance professionals worldwide.

1.2 Purpose :

Enterprise-level platform security that improves with each release.
Infinite customizability of the system.
Data integration of various data sources.

<u>PROBLEM DEFINITION & DESIGN THINGING</u>:

2.1 Empathy Map:



2.2 Ideation & Brainstroming:

RESULT:

3.1 Data Model

Object Name	**Fields in the object**	
Object:1	**Field Lable**	**Data Type**
	Lead	Auto Number
	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
Object:2	**Field Lables**	**Data Type**
	Buy	Text Area
	Property type	Picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
Object: 3	**Field Lables**	**Data Type**

	Rent	Auto Number
	Rental City	Text
	BHK Type	Picklist
Object: 4	**Field Lables**	**Data Type**
	Loan Id	Auto Number
	Interest Rate	Currency
	Term	Number
	Anual Loan	Number
	Loan Repayment	Number
	Loan Amount	Formula

Activity1:

Creating Developer Account

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :

a. First name & Last name

b. Email

c. Role : Developer

d. Company : College Name

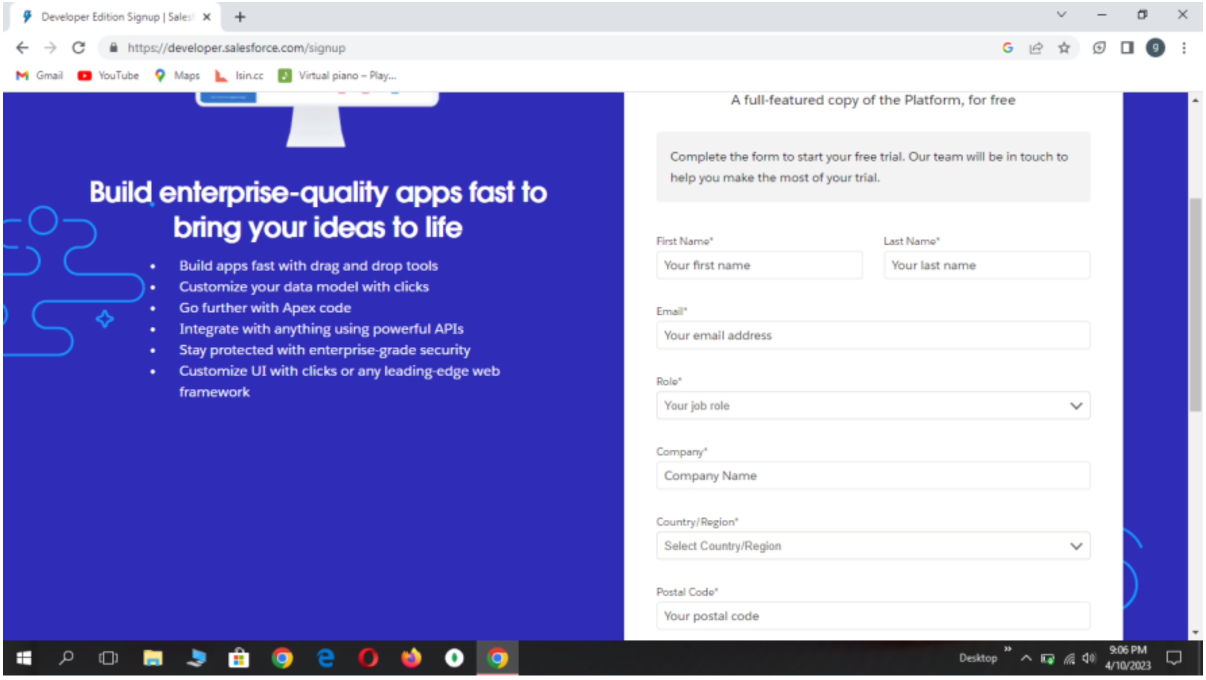
e. County : India

f. Postal Code : pin code

g. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign up after filling these.



Activity 2:

Account Activation

1. 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 5-10mins, as

2. Login To Your Salesforce Account

- Go to salesforce.com and click on login.
- Enter the username and password that you just created. 3.After login this is the home page which you will see.

Activity 3

Objects-

To Navigate to Setup page:

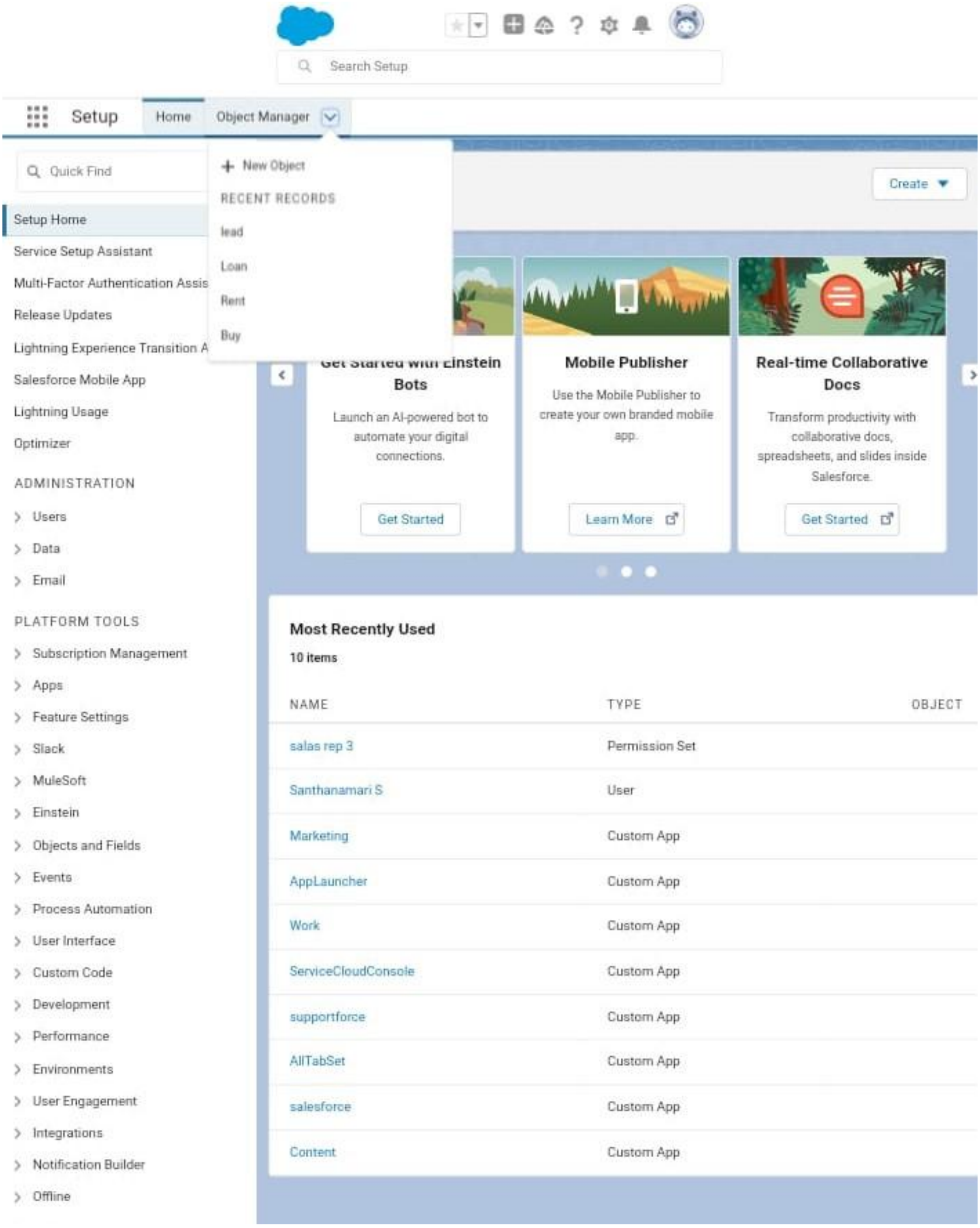
1. Click on gear icon → click setup.

To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on CustomObject.

On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search → **Save**

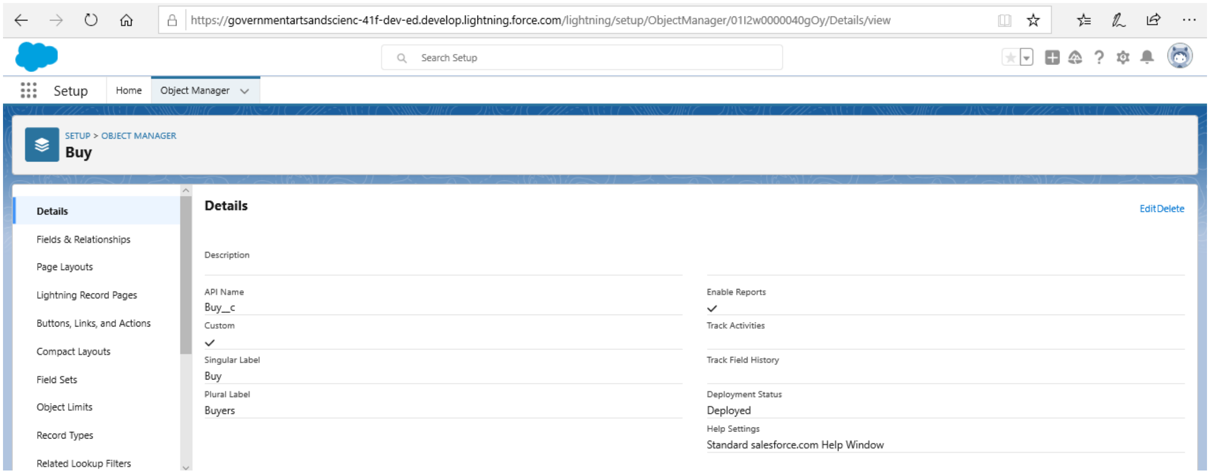


Activity 4:

Create Object Buy

1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom

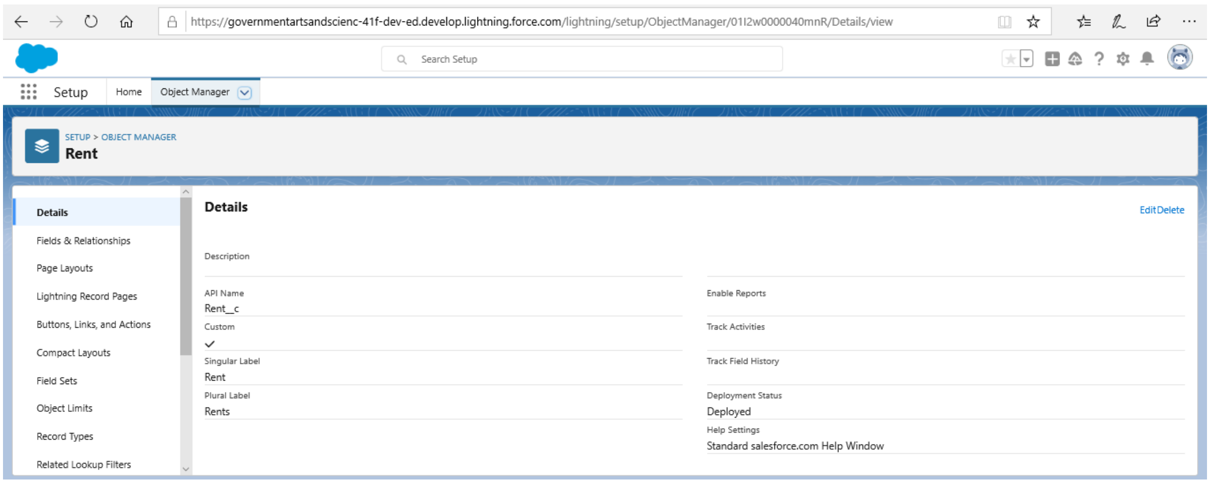
Object.
3. Enter the label name→Buy
4. plural label name→ Buyers
5. click on Allow reports,
6. Allow search → **Save**



Activity 5:

Create Object Rent

1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom
Object.
3. Enter the label name→Rent
4. plural label name→ Rents
5. click on Allow reports,
6. Allow search → **Save**

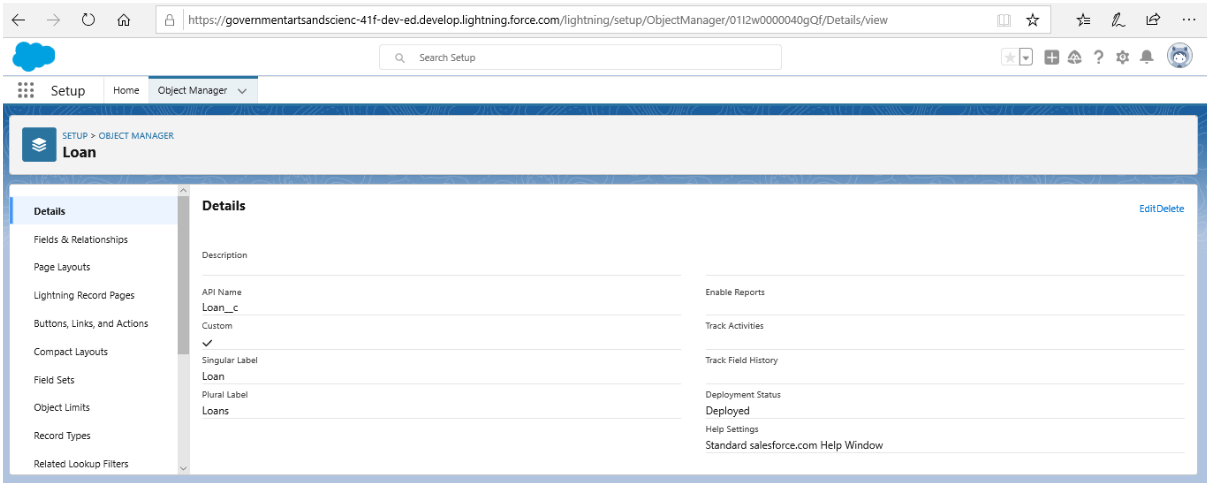


Activity 6:

Create Object Loan

1. To create an object
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name→Loan
4. plural label name→ Loans
5. click on Allow reports,

6.Allow search → **Save**



Activity 7:

Create the Lightning Tab

To create a Tab:(Lead)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under customobject tab)
2. Select Object(Lead) → Select the tab style → Next (Add to profiles page) keep it asdefault → Next (Add to Custom App) keep it as default → Save.

Activity 8:

To Create a Tab:(Buy)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under customobject tab)
2. Select Object(Buy) → Select the tab style → Next (Add to profiles page) keep it asdefault → Next (Add to Custom App) keep it as default → Save.

Activity 9:

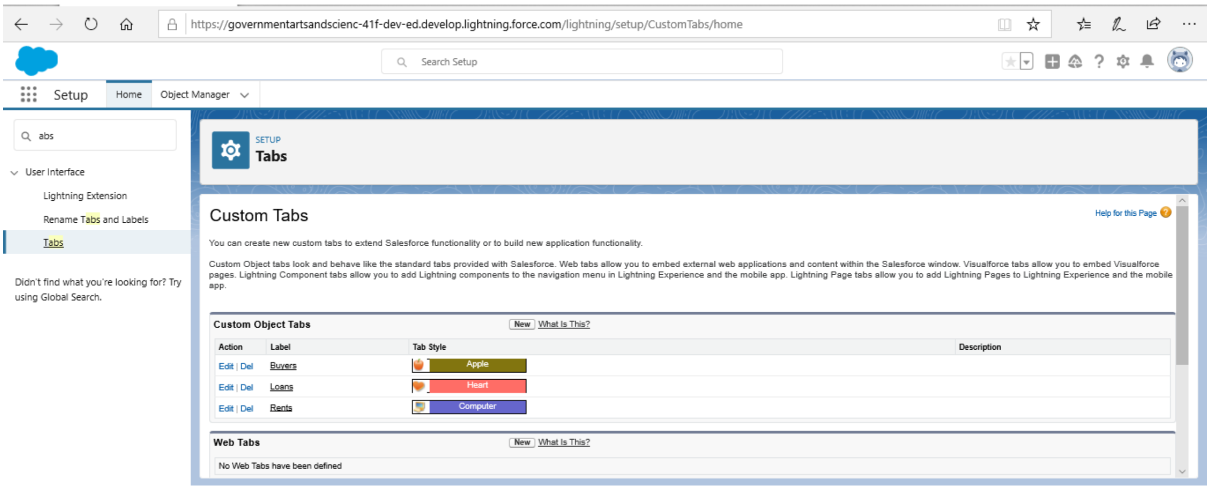
To Create a Tab:(Rent)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under customobject tab)
2. Select Object(Rent) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save

Activity 10:

To Create a Tab:(Loan)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under customobject tab)
2. Select Object(Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save



Activity 11:

Create the Lightning App

1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.
2. Fill the app name as an **Property Management** in app details and branding →Next →(App option page) keep it as default → Next

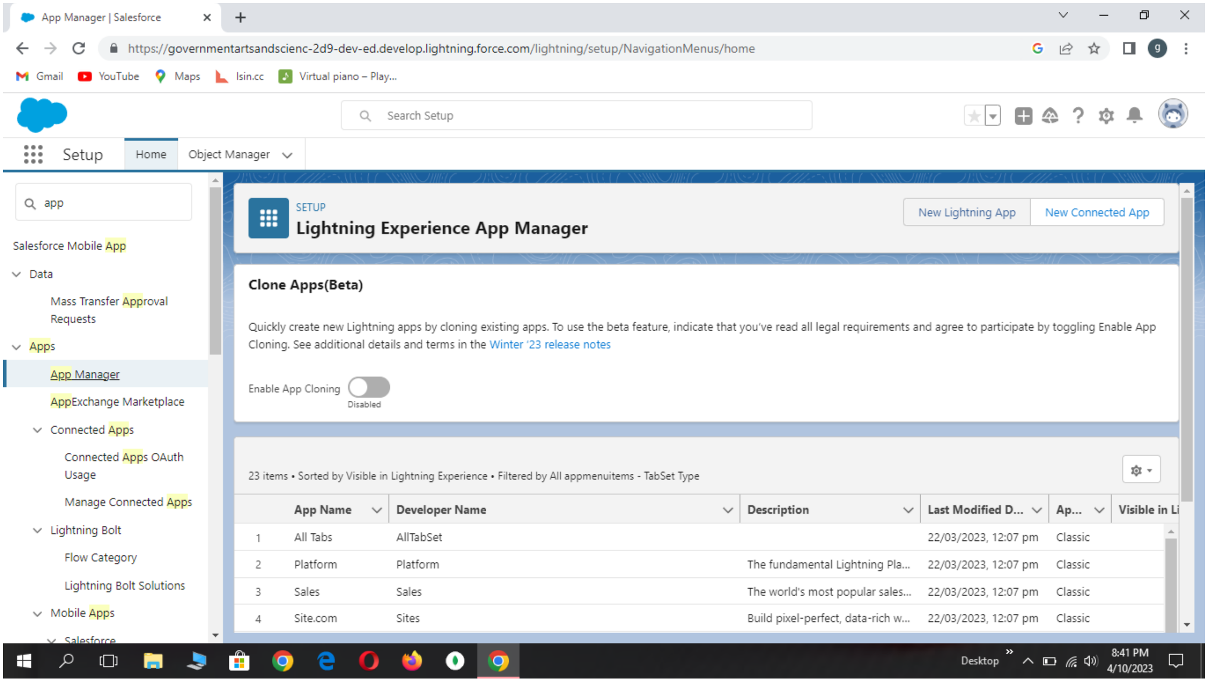
3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy,Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform user, Standard User → Next.

4. To Add Navigation Items:

Select the items from the search bar and move it using the arrow button → Next.

5. To Add User Profiles:

Search profiles in search bar → click on the arrow button → save & finish.



Activity 12:

Create the Lead Field

1. Go to setup → click on Object Manager → type object name in search bar → click on the object.
2. Now click on "Fields & Relationships " → New.
3. Fill the field label name Lead → Next → Next → Save.

Create the remaining Fields:

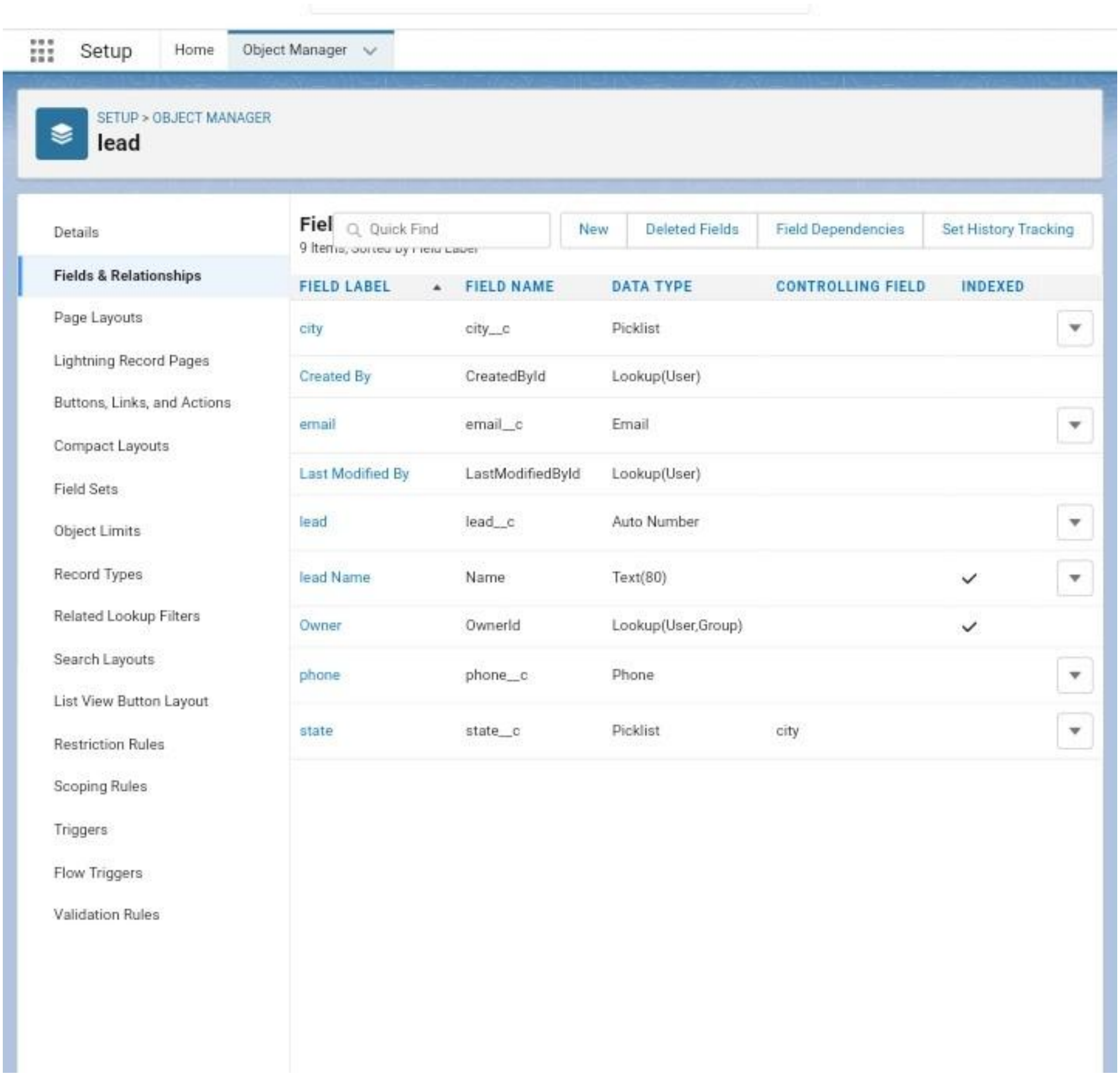
Follow the Above Steps to create the Field just change the Labels for Below Fields

Lead:(AutoNumber Created Field while creating Object) →L-{0000}

State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

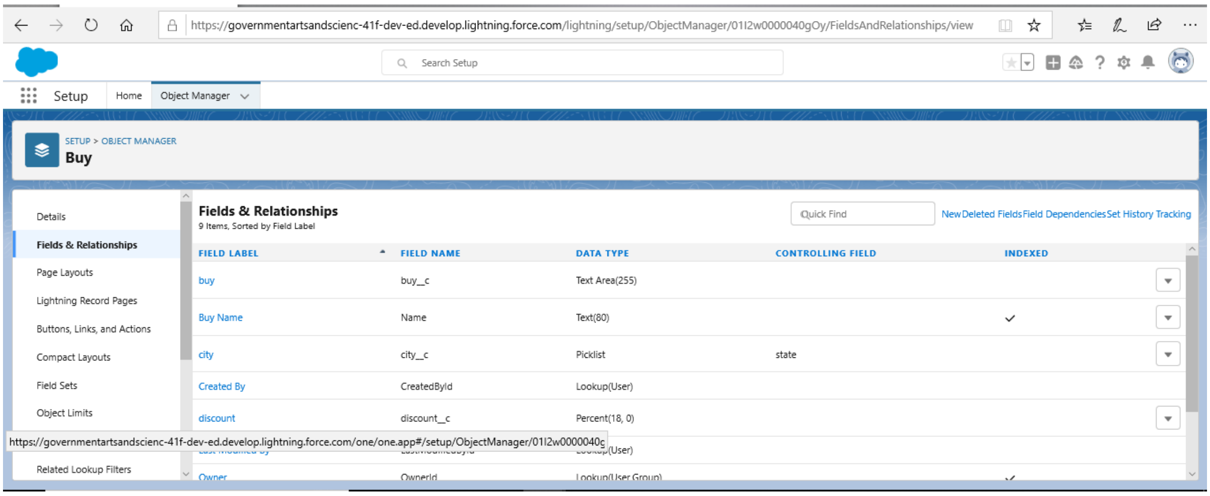
City:Create the Picklist(Mumbai, Pune, Nashik)(Field Dependency

Email: Create the Email Select the Data Type As Email (Email)
Phone:Select the Field Data type as (Phone)
In the Fields and Relationship go to the Field Dependencies



Activity 12: (For Object Buy)

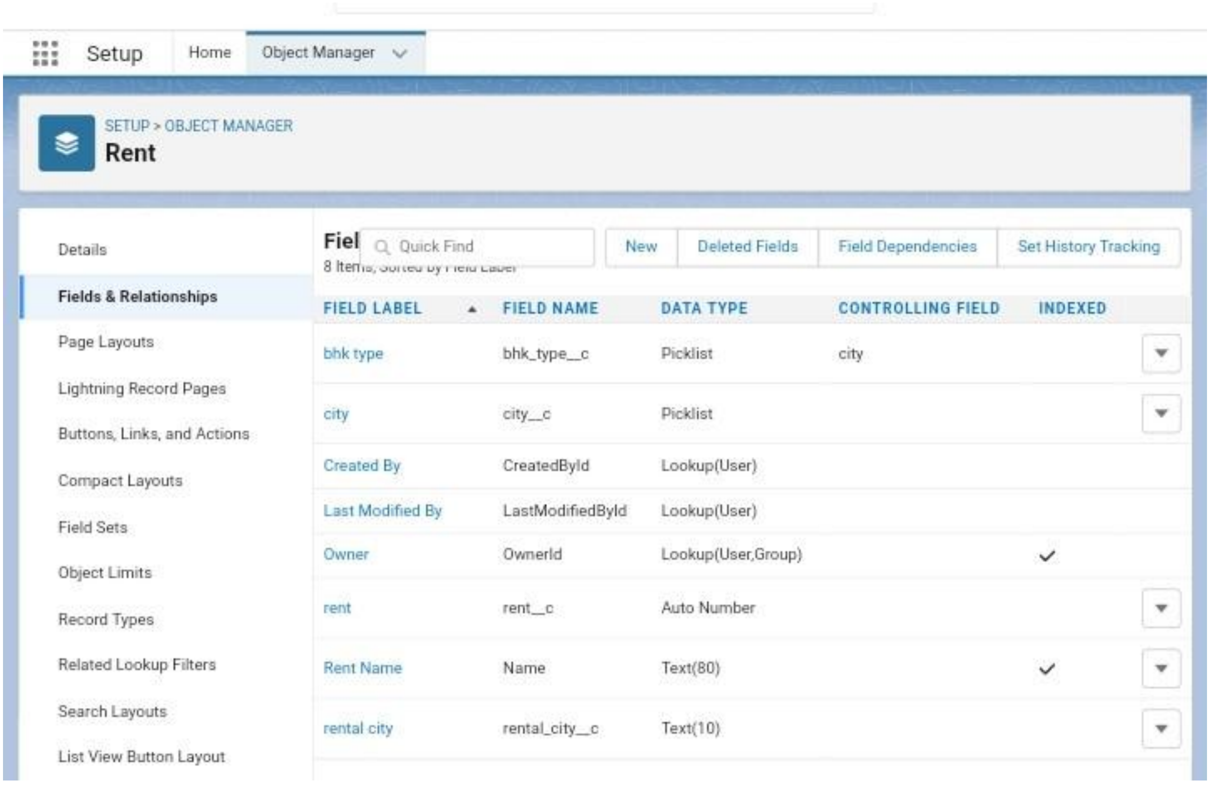
1. Create Field for Buy
2. **Create Property Type:** (Picklist) (Residential, Commercial, Industrial)
3. **Discount**:(Percentage As the Field Data Type)
4. **State:**Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
5. **City**:(Take Any City for Field Dependency)
6. Annual Amount To Be Paid



Activity 14:

Create Field for Rent

1. **Rent:**(Auto Number while Creating the object)→ R-{0000}
2. **Rental City:**Select the Text as the Field Data Name(Any City)
3. **BHK type:**(Picklist) (1BHK, 2BHK,3BHK)



Activity15:

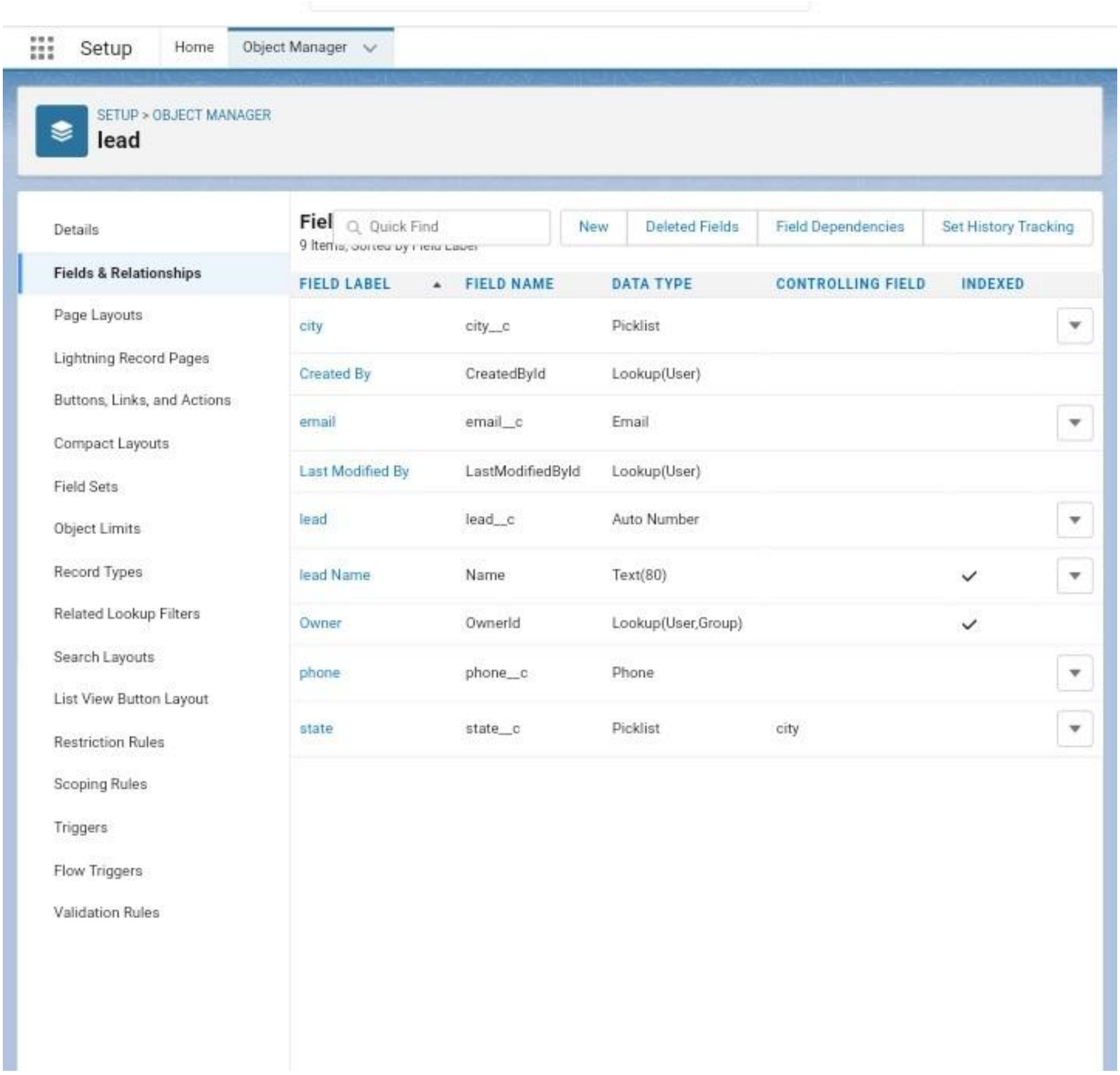
Create Field for Loan

1. **Loan Id**: Auto generated Field Take it as Autonumber LN-{0000}
2. **Interest Rate**: (Select the Field Data Type As Currency)
3. **Term**:(Select the Field Data type as Number)
4. **Annual Loan** Field create the Number as the field data type
5. **Total Loan Instalments:**(Field create the Number as the field data type)
6. **Loan Repayment**(Field create the Number as the field data type)
7. **Loan Amoun**(Select the Field data type as Formula)
8. For the Loan Object→ Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following

formula

**(Loan_Repayment__c * (((1+(Interest_rate__c /52))^ Term__c) -1))/((
Interest_rate__c /52)*((1+(Interest_rate__c /52))^ Term__c))**

##Check the syntax below whether the formula syntax is correct or not



Activity 16:

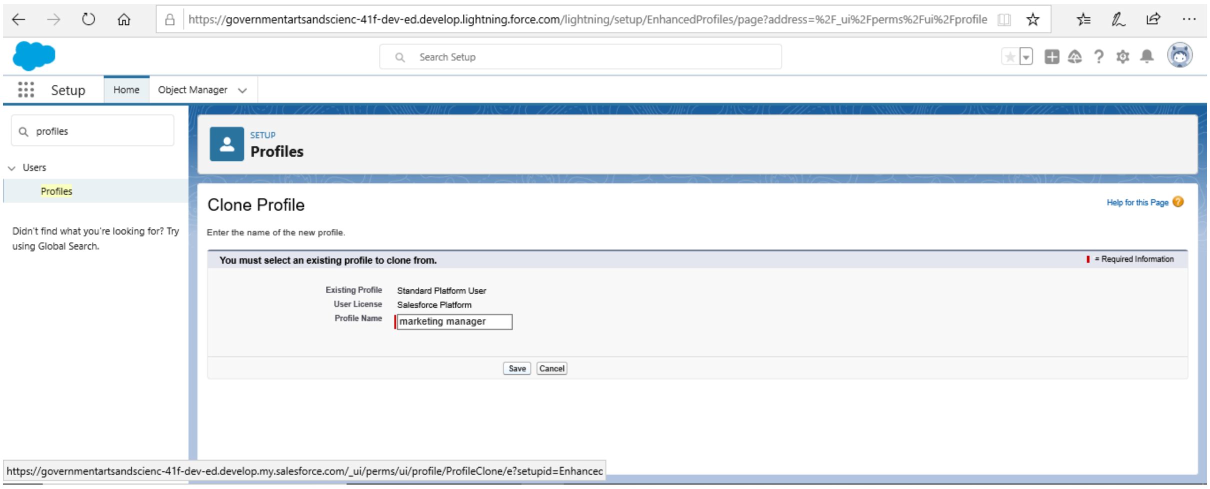
To create a new profile:

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (standard user is preferable) → enter profile name → save
2. .Enter a Profile Name
3. Click on the new created profile
4. While still on the profile page, then click Edit.
5. Scroll down to Custom Object Permissions and Give view all access permissions and assignto the parent profile
6. Sales Manager →Standard user Profile , Marketing Executive1 and Executive2→Standard Platform User,Marketing Manager→Standard Platform User For

Activity 17:

Create Marketing

1. Then In The Profile Level Give Read and Create Access to Marketing Executive and Read, Create, Edit, Delete for the Marketing manager
2. Marketing Manager Should Have Access to Marketing Executive



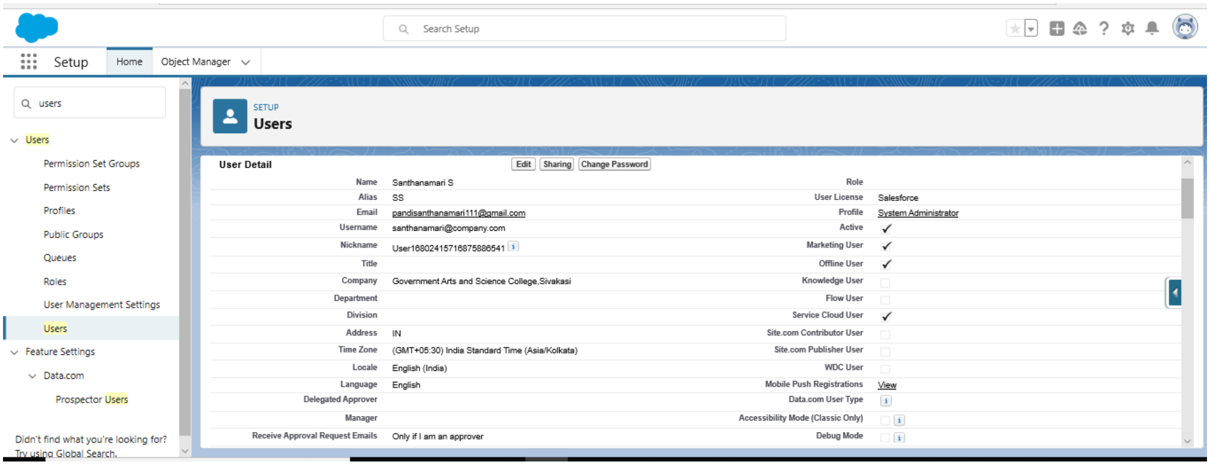
Activity 18-Sales:

1. In the Profile Level Sales Manager is Having Create, Edit, Delete
2. For Sales Rep1→ Read, Create, Edit
3. For Sales Rep2→Read, Create, Edit
4. For Sales Rep3→ Read only.

Activity 19:

Create User

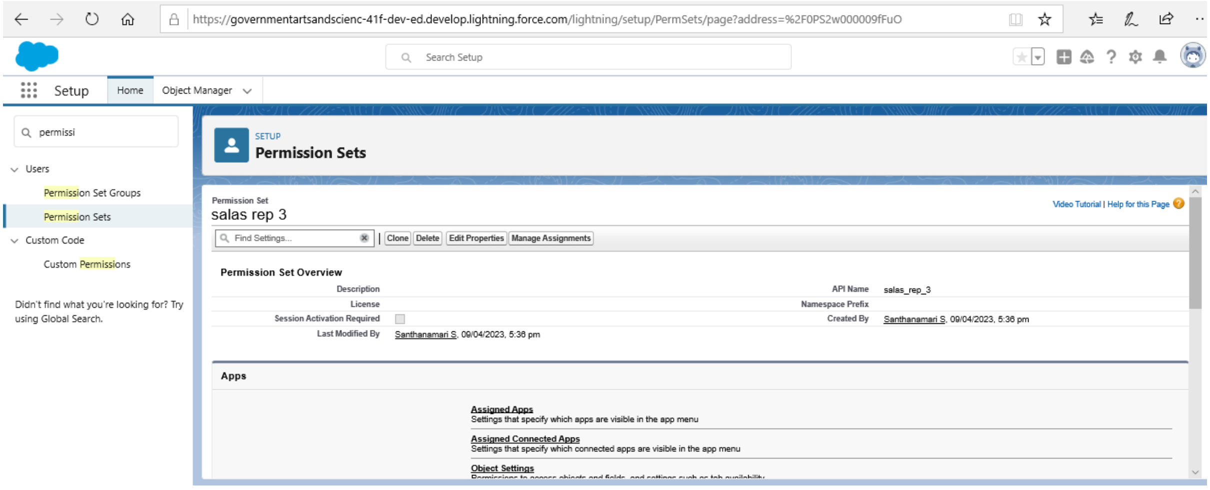
1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.



Activity 20:

Create the Permission Sets

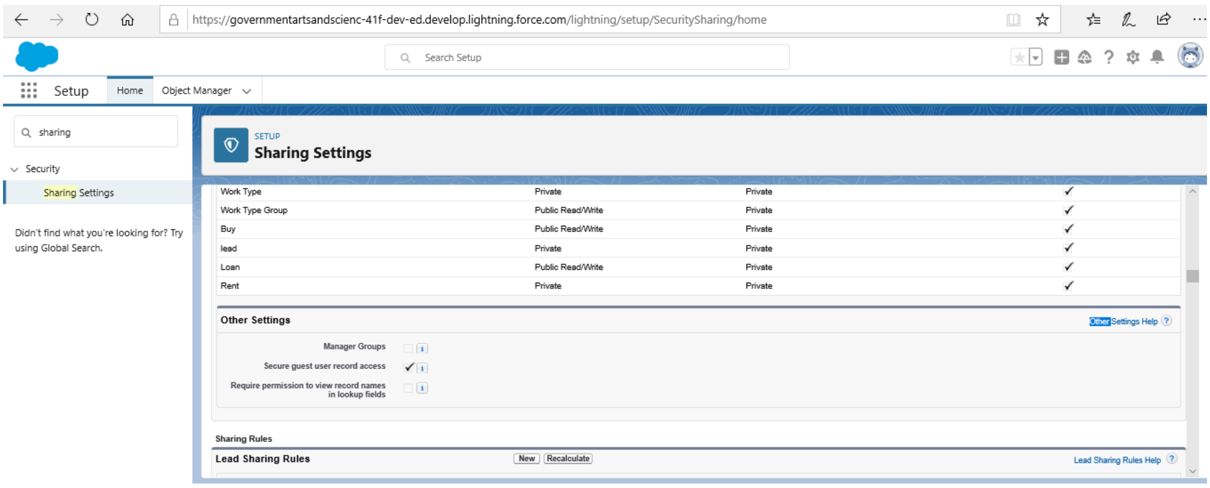
1. Go to setup → type “permission sets” in quick search → select permission sets → New.
2. Enter the label name → save.
3. After saving the permission click on the Manage assignment
4. Now click on the Add Assignment
5. Now select the users and click on save
6. Go to permission set and add the access For Sales Rep3 give Access with Create permission for the User



Activity 21:

Create OWD Setting

1. Setup, use the Quick Find box to find Sharing Settings.
2. Click Edit in the Organization-Wide Defaults area.
3. For each object, select the default access you want to give everyone.
4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for **Lead, Rent** custom object
5. Click Edit and from the Drop Down select private for internal and external
6. This Setting is for all the User Which have been Created



Activity 22:

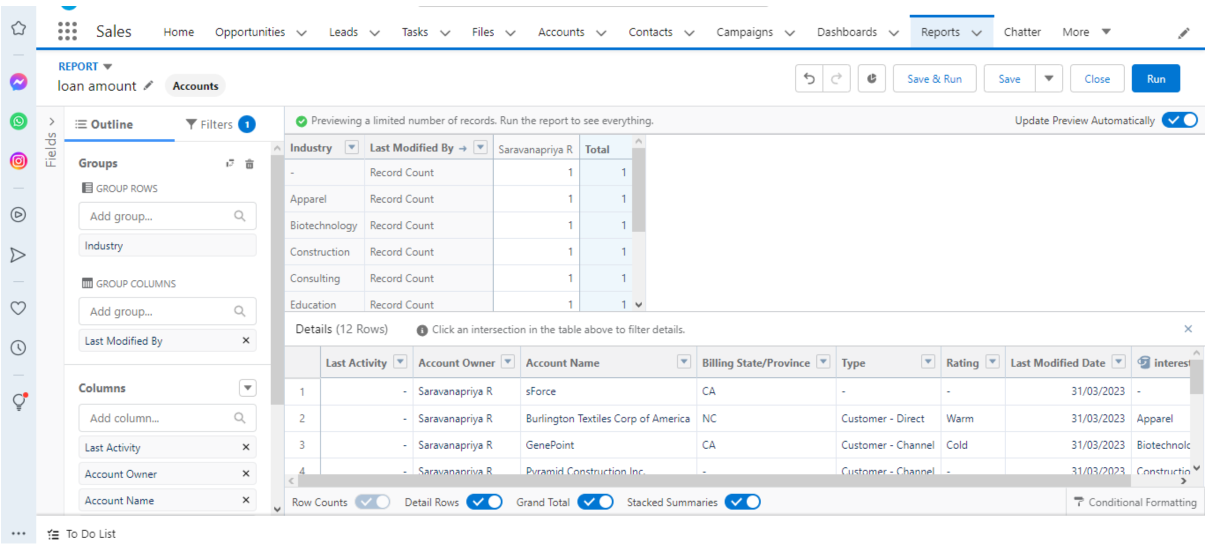
Create Report

1.Go to the app → click on the reports tab

2. Click New Report
3. Select report type from category or from report type panel or from search panel → click on start report.
4. Customize your report, then save or run it.

Create Report for following Condition

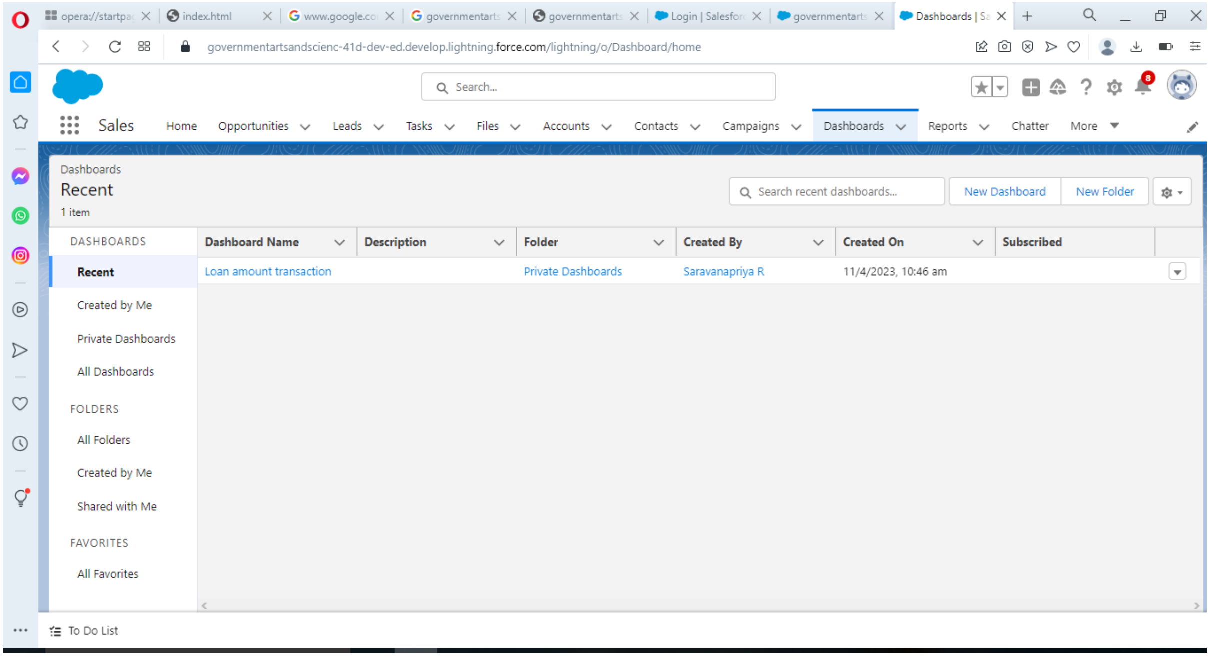
1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the Property
2. The Condition should be Like Loan Amount **>=** to 5000$



Activity 23:

Create Dashboards

1. Go to the App Launcher and select the Dashboards
2. Select add component
3. Select the folder select the following option new lead with loan Amount
4. Select in which format you want display chart

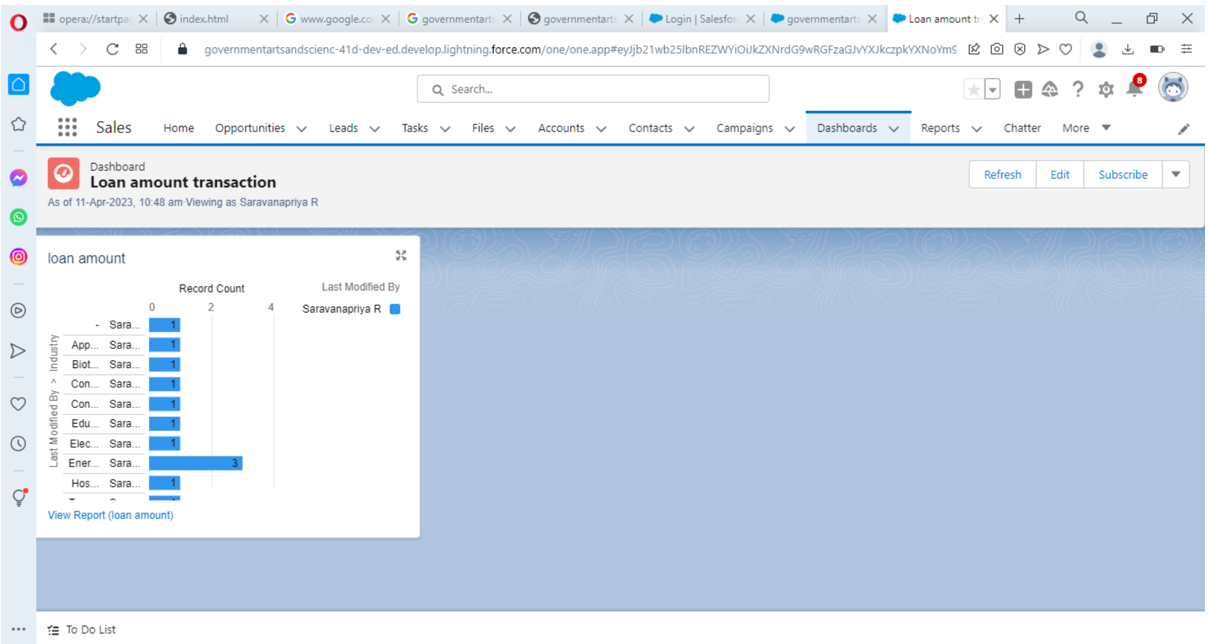


Activity24:

Create Dashboard

1. Create the Dashboard for the Same Take Any Type of Dashboard(Chart) And Display Iton The App Home Page

Trailhead Profile Public URL



Team Leader – https://trailblazer.me/id/santg37
Team Member 1- https://trailblazer.me/id/sants64
Team Member 2- https://trailblazer.me/id/shobs77
Team Member 3- https://trailblazer.me/id/sarar127

Advantages & Disadvantages

Advantages:

- You can accesss your information from anyware
- You will save time and money by being more efficient
- Guest satisfaction may increase with a smooth check in process

Disadvantages:

- Time consuming if you choose the wrong system
- Might seem expensive for a small business
- Training cost and time

Applications:

- property management mobile apps help owners and landlords work remotely and access data on their portable devices from different locations.
- These apps allow them to post vacancy ads, track rent payments check expensions and generate invoices.

Conclusion:

Property management system software is very crucial for all the hotels. Expecialy opera PMS constitutes the most appropriate PMS software for Hilton Athens. It is user friendly, connects with central reservation system(CRS), point of sale (POS) etc.

Future Scopes:

The growing population, overall economic growth of the country, rising income levels and increased foreign investment has lead to a heightened need for improved infrastructure across urban, semi_urban and rural india.