

# PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

## Project Report Template

### Introduction:

#### 1.1 Overview

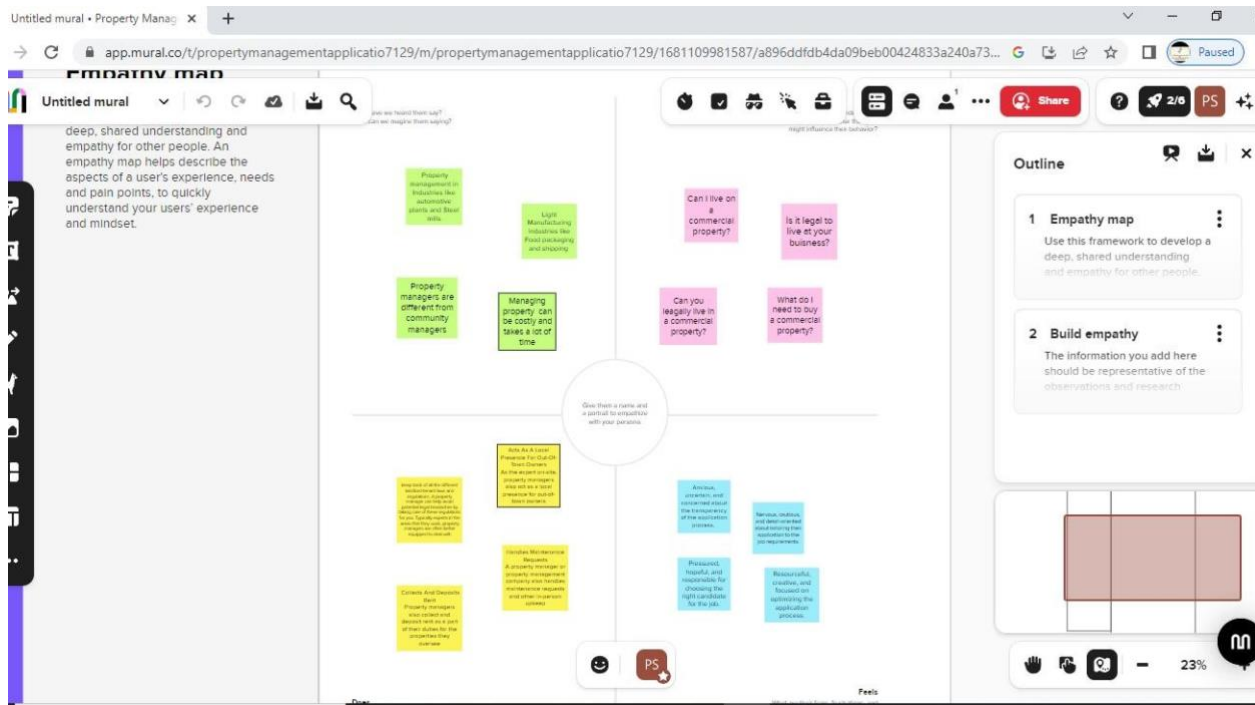
\* The project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce and looking for a realtime project.

#### 1.2 Purpose:

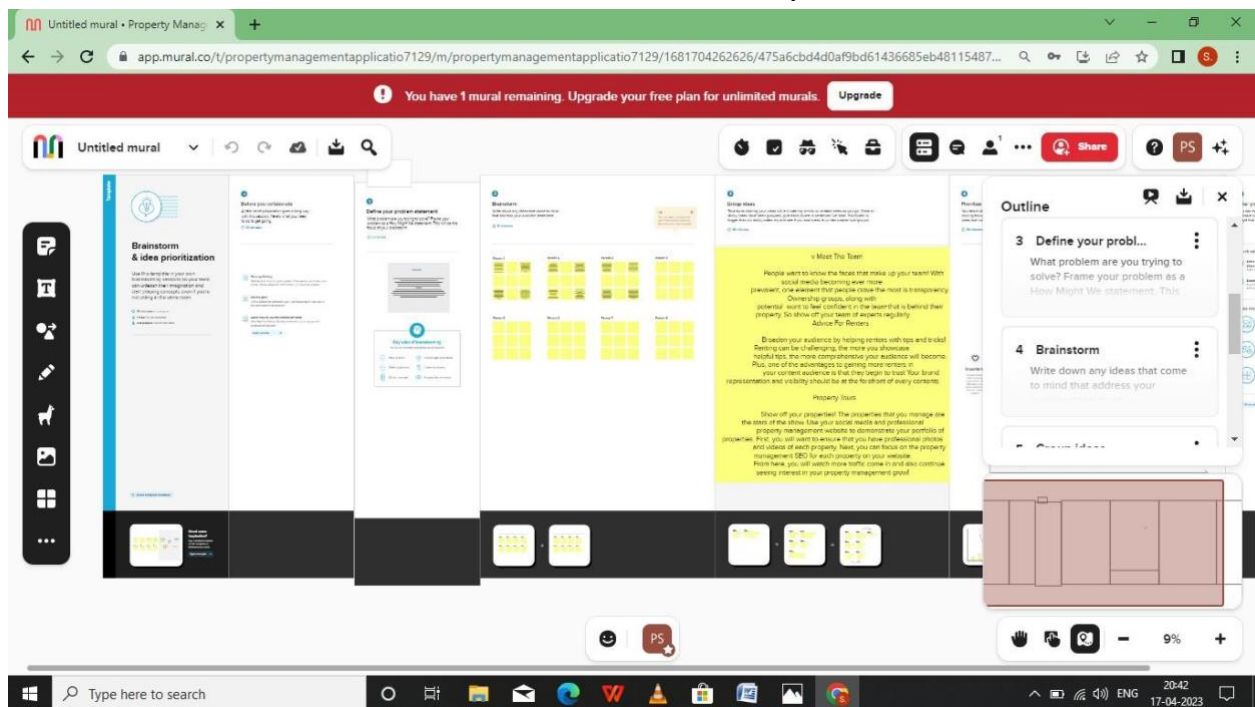
\*It is help to those professionals who are in cross-technology and wanted to switch to salesforce with the help of this project they will gain knowledge and can include into their resume as well.

### Problem Definition & Design Thinking

#### 2.1 Empathy Map



## 2.2 Brainstorm and idea Prioritization map



## 3 Result

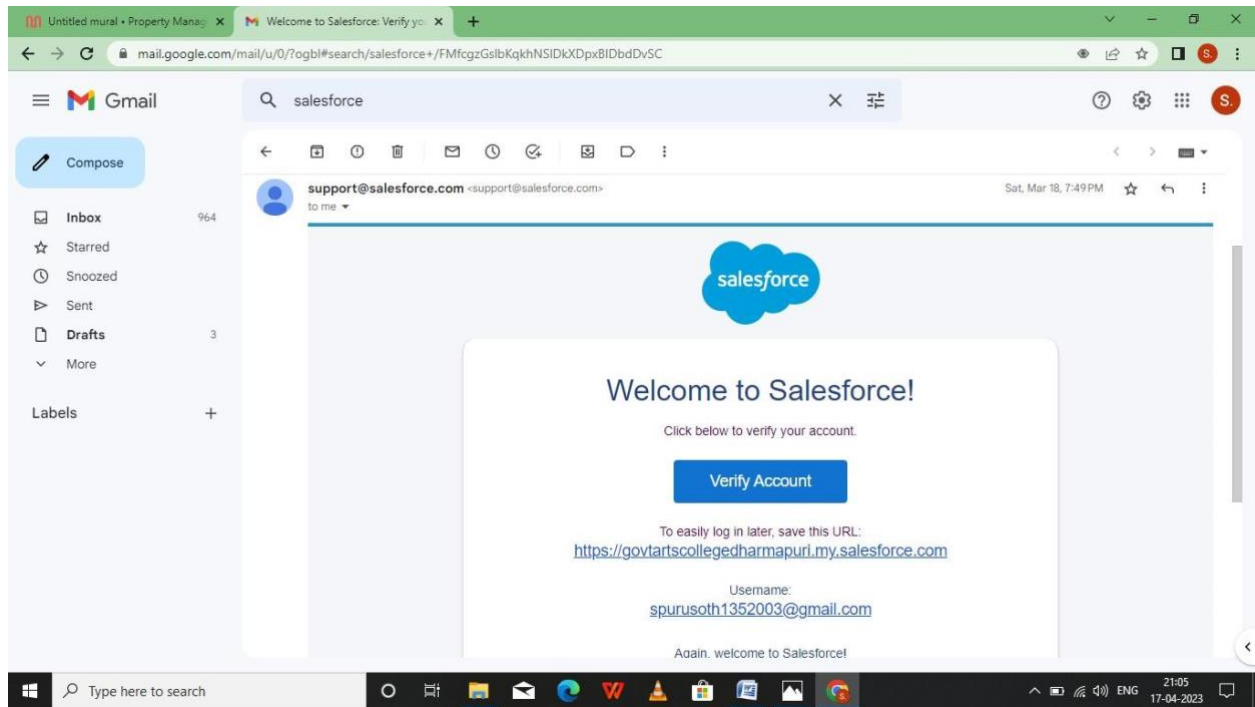
### 3.1 Data Model

Object name	Fields in the Object	
Obj 1: Lead	Field label	Data Type
	Leads	Auto number
	State	Picklist
Obj 2: Rent	Field label	Data Type
	Discount	Percentage
	<b>BHK</b>	Picklist

### 3.2 Activity & Screenshot:

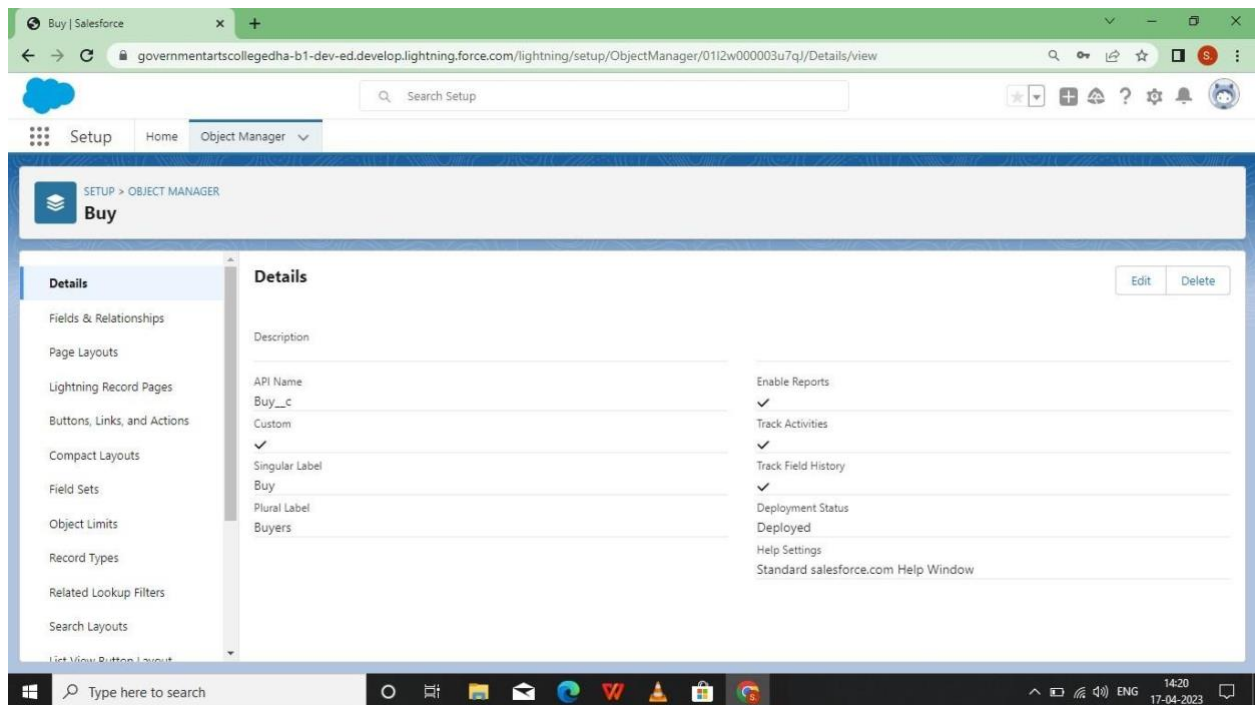
Milestone 1:

Activity 2:

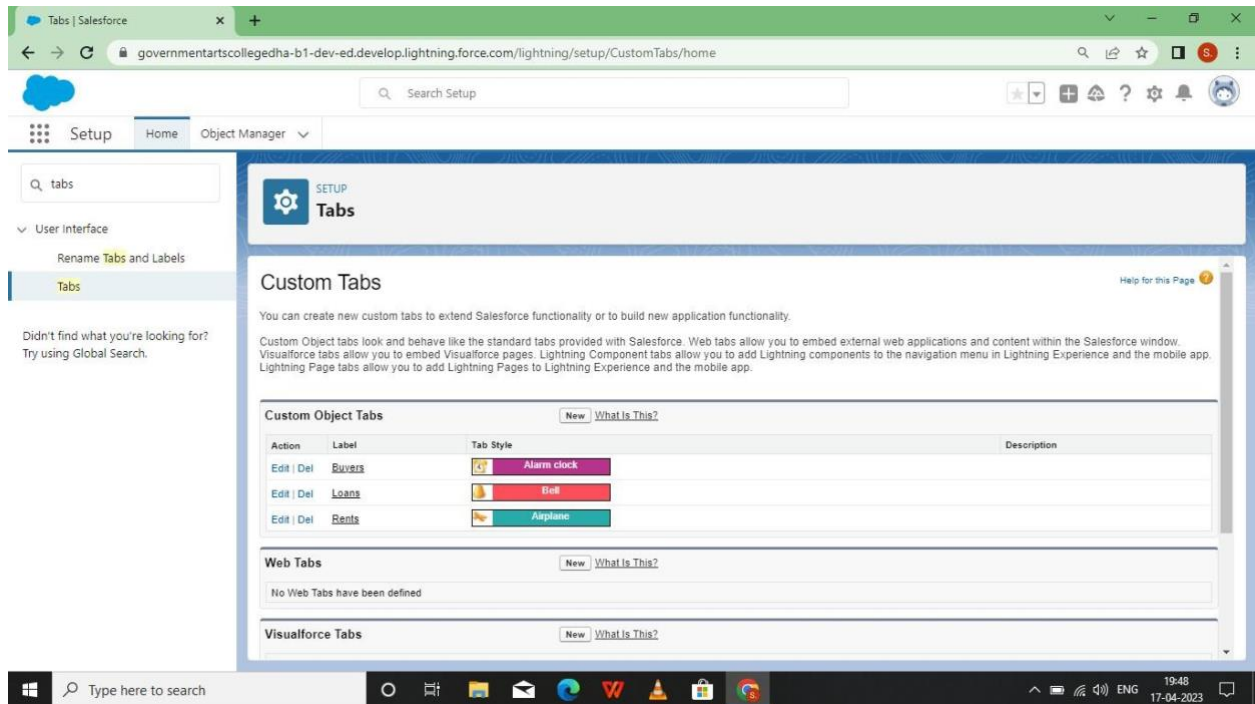


## Milestone 2

### Activity 1:

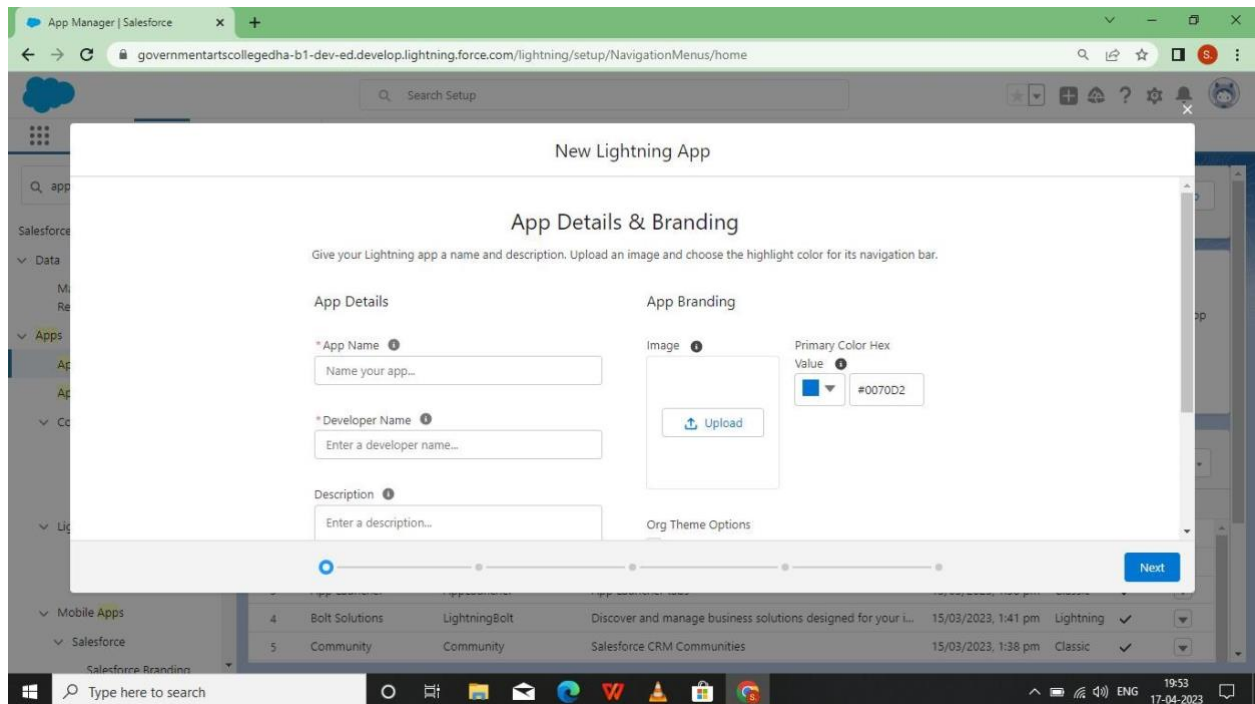


## Milestone 3 Activity 1:



## Milestone 4

### Activity 1:



# Milestone 5

## Activity 1

The screenshot shows the Salesforce Object Manager setup page for the 'lead' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'lead' object. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedById, Lookup(User)), Last Modified By (LastModifiedById, Lookup(User)), lead Name (Name, Text(80)), and Owner (OwnerId, Lookup(User,Group)).

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

## Activity 4:

The screenshot shows the Salesforce Profiles setup page. The left sidebar contains a navigation menu with options: Users (selected) and Profiles. The main content area is titled 'Profiles' and shows a table of profiles for the 'lead' object. The table has columns: Action, Profile Name, User License, and Custom. The profiles listed are: Force.com - Free User, Chatter Moderator User, Chatter External User, High Volume Customer Portal User, Authenticated Website, Solution Manager, Marketing User, Contract Manager, Standard User, and Salesforce API Only System Integrations.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	Force.com - Free User	Force.com - Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter External User	Chatter External	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Solution Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Marketing User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Contract Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>

## Milestone 6

### Activity 1:

The screenshot displays the Salesforce Setup interface for creating a new profile. The browser address bar shows a development URL. The left sidebar contains navigation links for Setup, Home, and Object Manager, with a search bar and a 'profile' search filter. The main content area is titled 'SETUP Profiles' and includes a 'Search Setup' bar. The configuration process is divided into three steps:

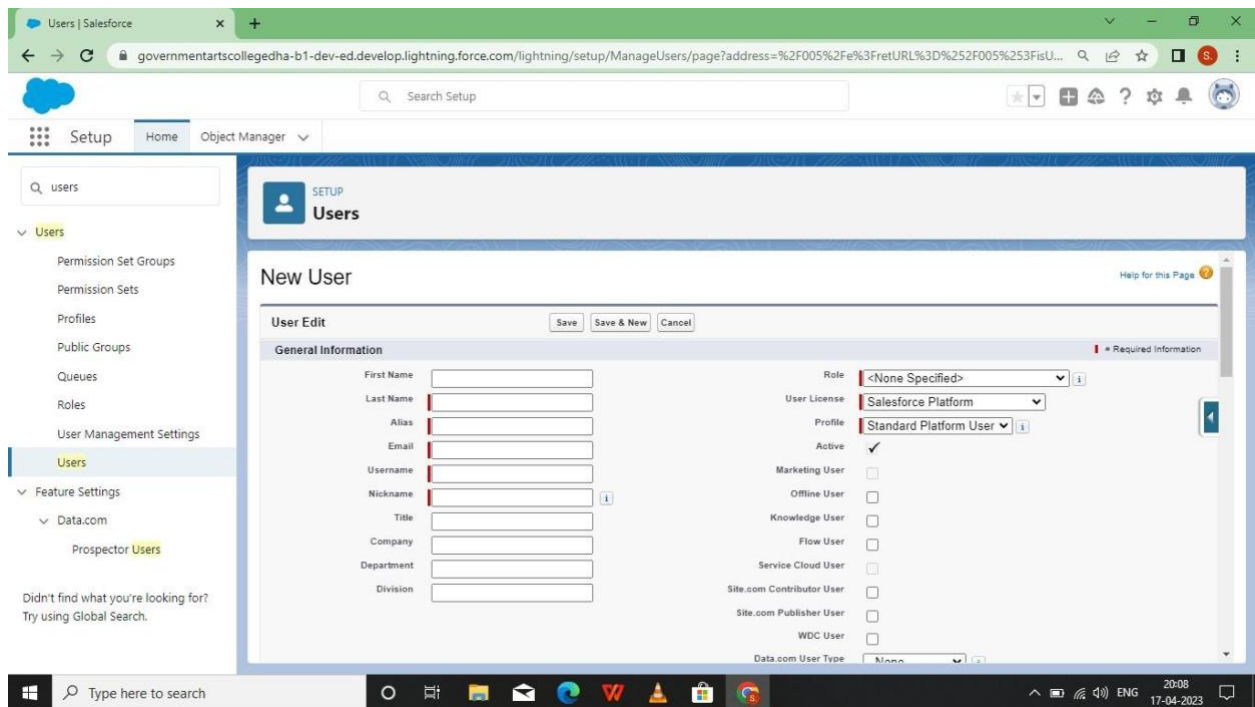
- Step 1. Enter View Name:** Includes fields for 'View Name' (containing 'All Profiles'), 'Created By' (Gokulan J.), and 'Last Modified By' (Gokulan J.). Buttons for 'Save', 'Save As', 'Delete', and 'Cancel' are present.
- Step 2. Specify Filter Criteria:** Features a table with columns 'Setting', 'Operator', and 'Value'. The 'Operator' is set to 'equals'. A 'Clear All Rows' link is available. Examples provided are 'Modify All Data equals False' and 'Contact: Modify All equals True'.
- Step 3. Select Columns to Display:** Includes a search bar to specify columns to show in the list view. The search results show 'All' as the selected option.

The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 20:06 on 17-04-2023.

## Milestone 7

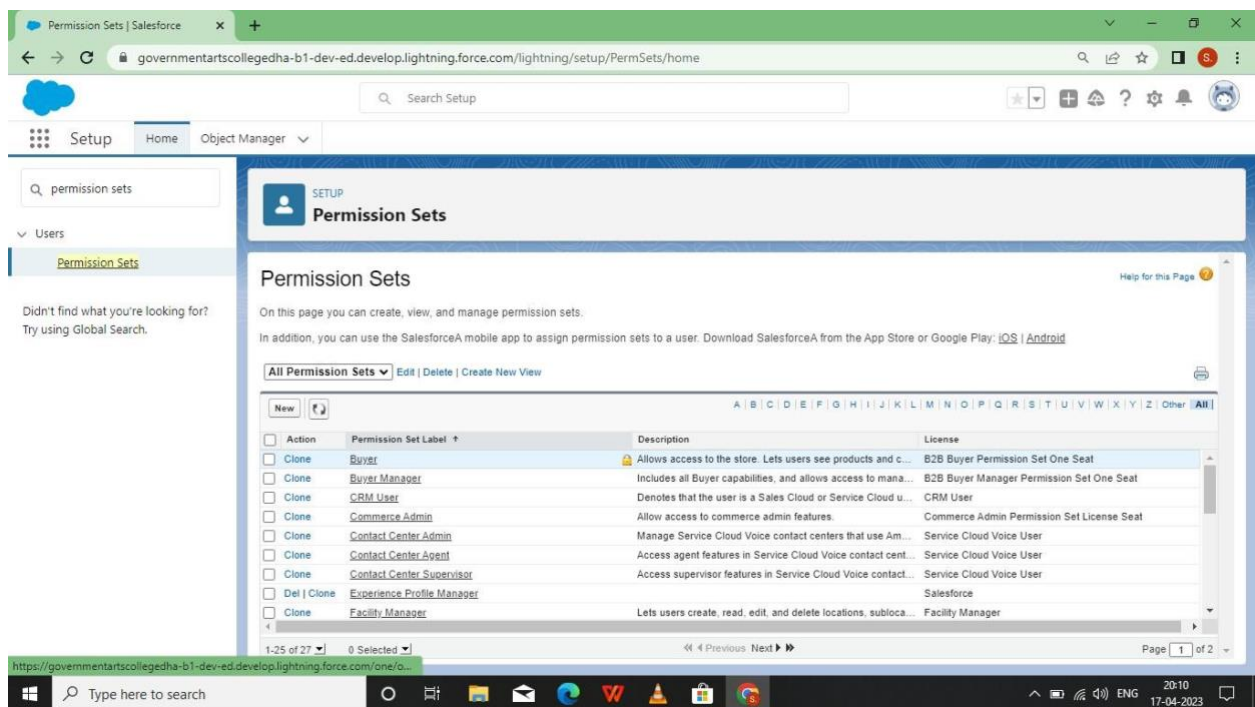
### Activity 1:





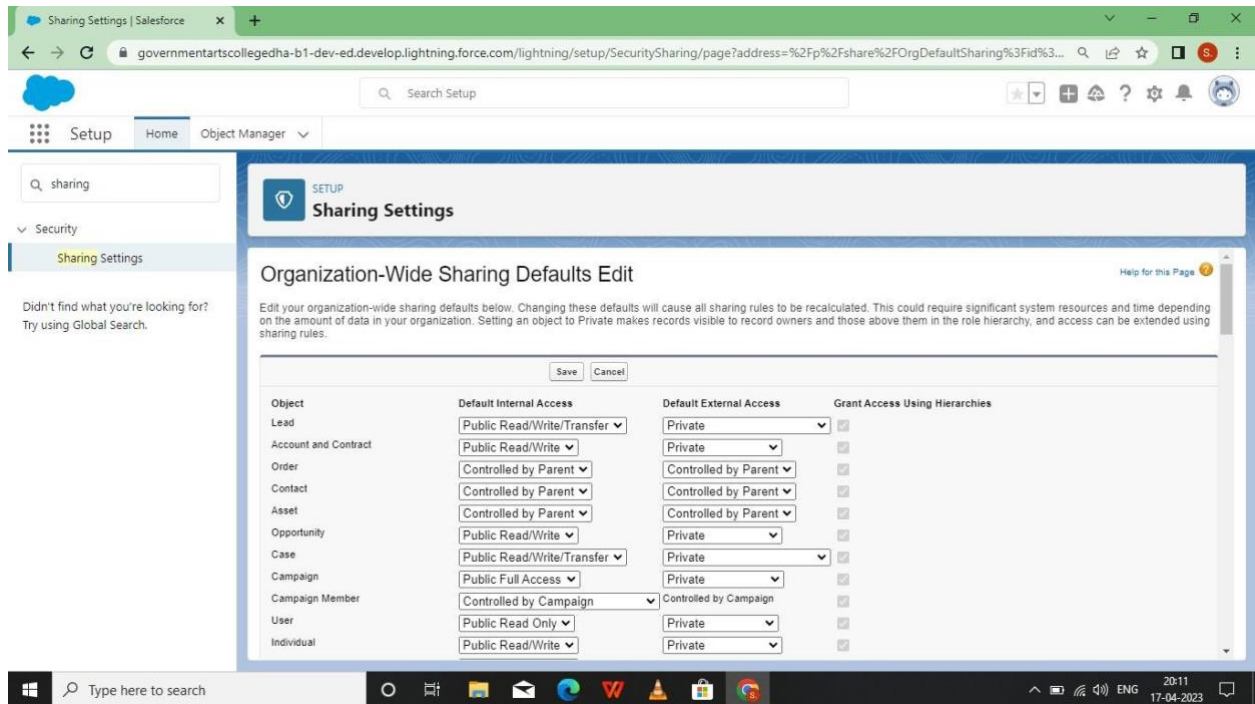
## Milestone 8

### Activity 1:





## Milestone 9 Activity 1:

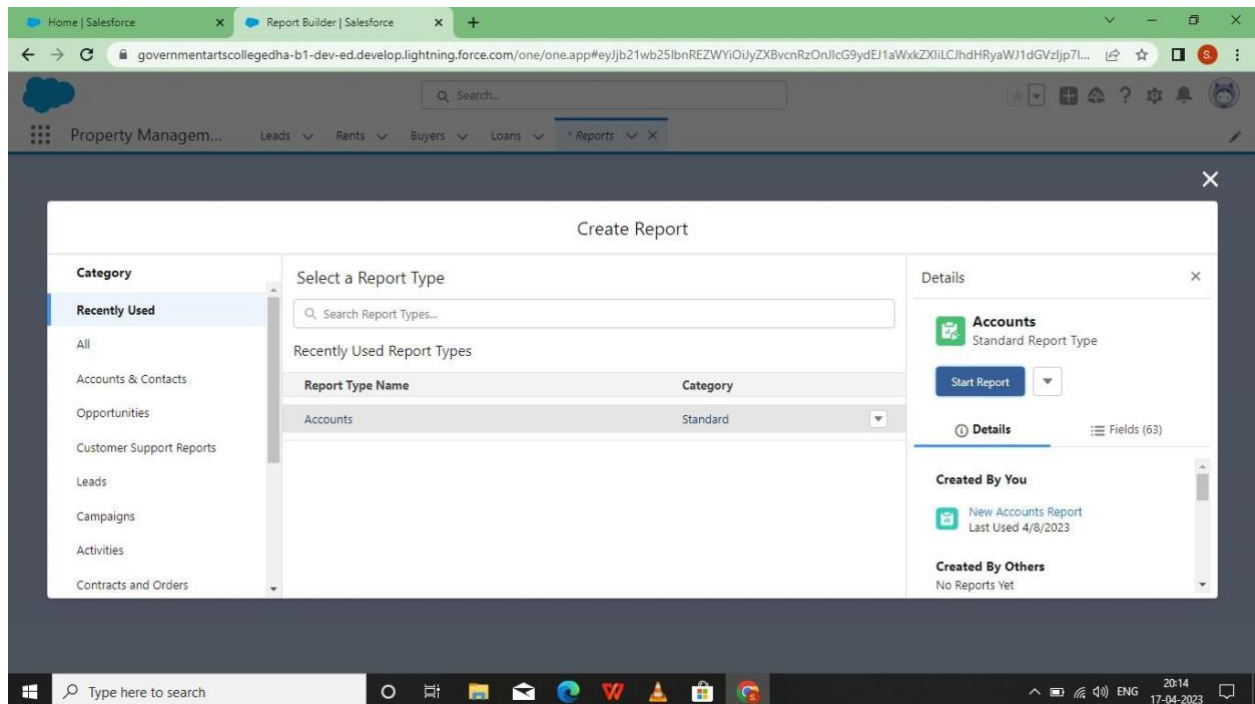


The screenshot shows the Salesforce Setup page for Sharing Settings. The browser address bar indicates a development environment. The left sidebar shows the Setup menu with 'Sharing Settings' selected. The main content area is titled 'Organization-Wide Sharing Defaults Edit'. It contains a table with columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists various objects and their corresponding sharing settings.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>

## Milestone 10

### Activity 1:



The screenshot shows the Salesforce 'Create Report' dialog. The left sidebar lists categories, with 'Recently Used' selected. The main area shows 'Select a Report Type' with a search bar and a table of recently used report types. The right sidebar shows details for the selected report type, 'Accounts'.

Report Type Name	Category
Accounts	Standard

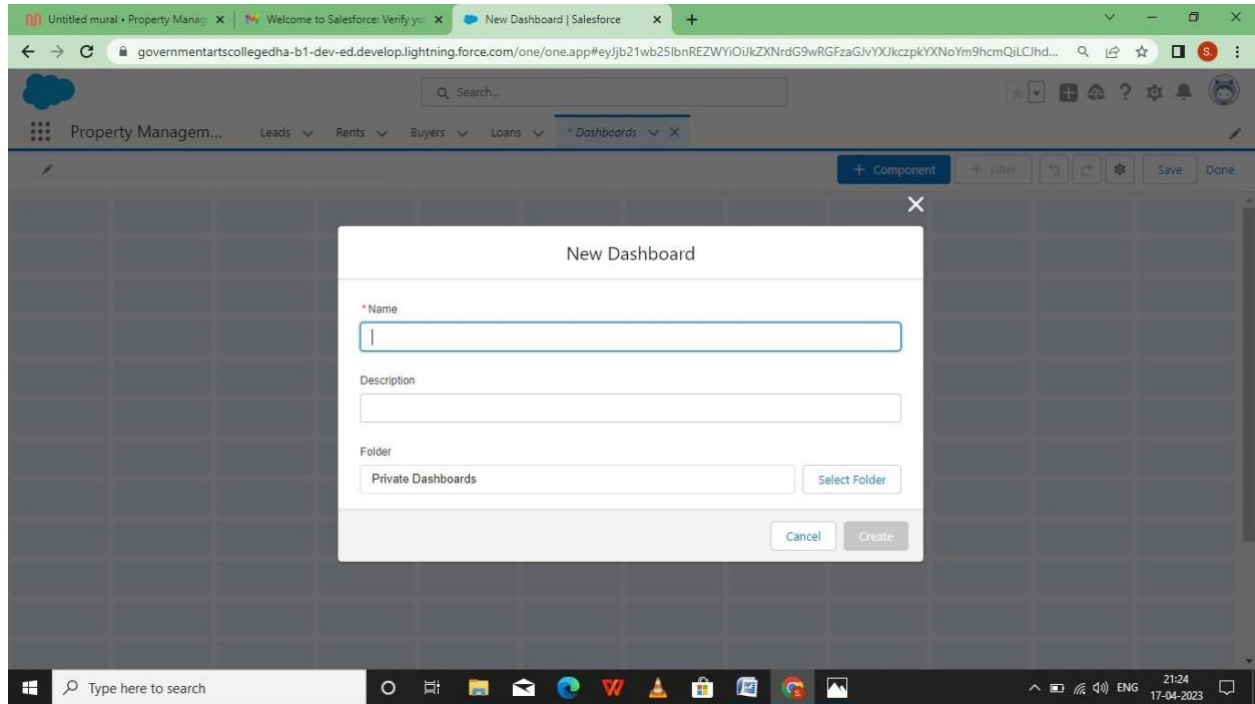
**Accounts**  
Standard Report Type

**Created By You**  
New Accounts Report  
Last Used 4/8/2023

**Created By Others**  
No Reports Yet

## Milestone 11

### Activity 1:



#### 4 Trailhead Profile Public URL:

Team Lead – Sathiyamoorthi M

<https://trailblazer.me/id/sathiyam14>

Team Member 1- Anishkarthik A

<https://trailblazer.me/id/aanish31>

Team MEMBER 2- Arunkumar N

<https://trailblazer.me/id/arunn62>

Team MEMBER 3-Vijay G

<https://trailblazer.me/id/vvijay231>

## 5. ADVANTAGES & DISADVANTAGES

### Advantages:

- \*You can access your information from anywhere
- \*You'll save time and money by being more efficient
- \*Guest satisfaction may increase with a smooth check-in process
- \*You'll increase bookings by refining your online presence
- \*You can optimize your revenue stream using built-in pricing tools

### Disadvantages:

- \* You'll be dependent on one vendor
- \* Cost can be prohibitive in the beginning
- \* All-in-one is not always best.

- \* Your Bottom Line

- \* Partnering with Stasher.com can increase revenue

## 6 CONCLUSION

- \*Property Management Application is user friendly

And easy

- \*It is customized with activities related to Property management Application .