

Property Management Application

PROJECT DESCRIPTION :-

Develop an 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 upto 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 reports on the count of loan passed getting the property purchased close the deal What you'll learn

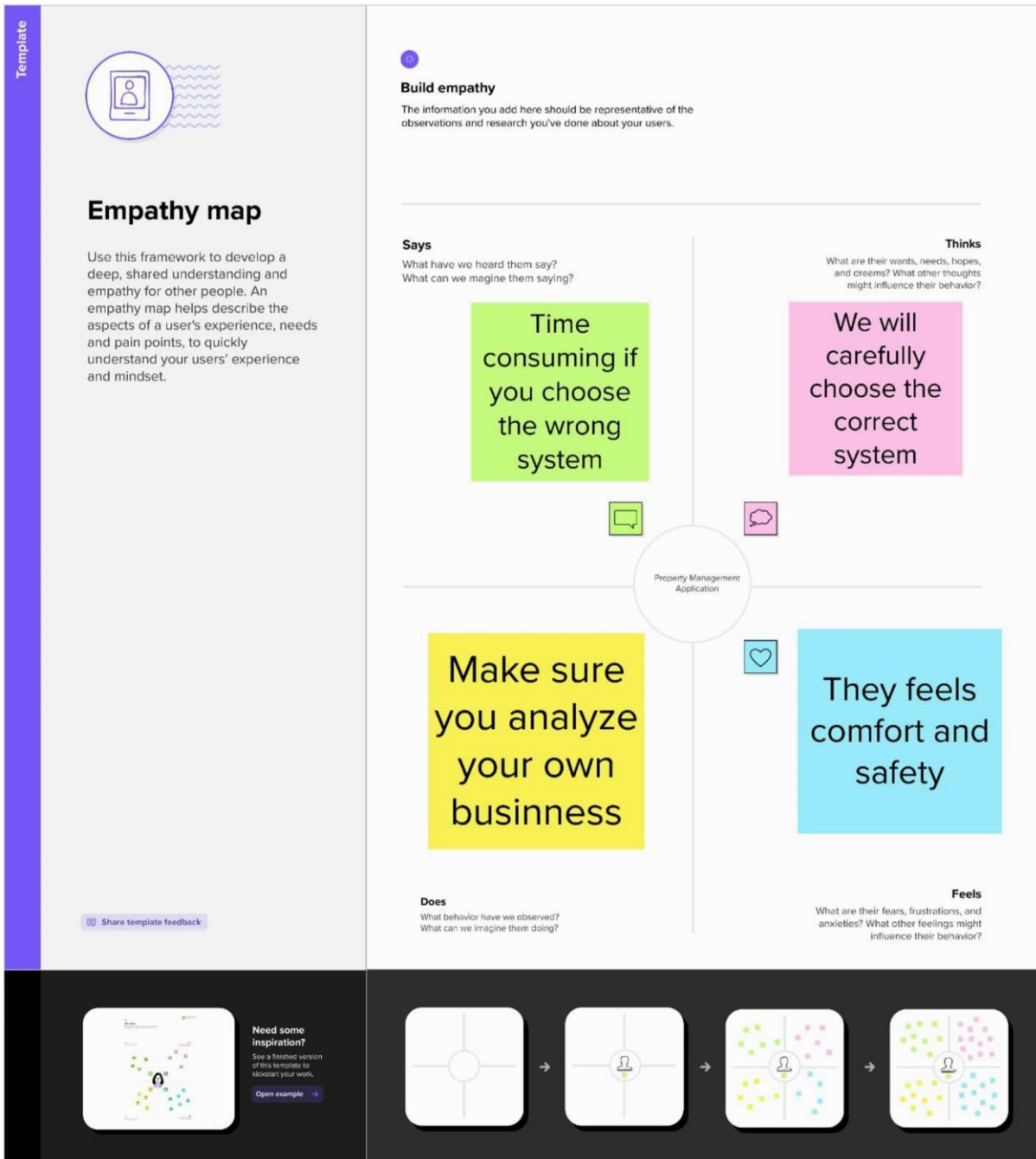
Real Time Salesforce Project

Object & Relationship in Salesforce

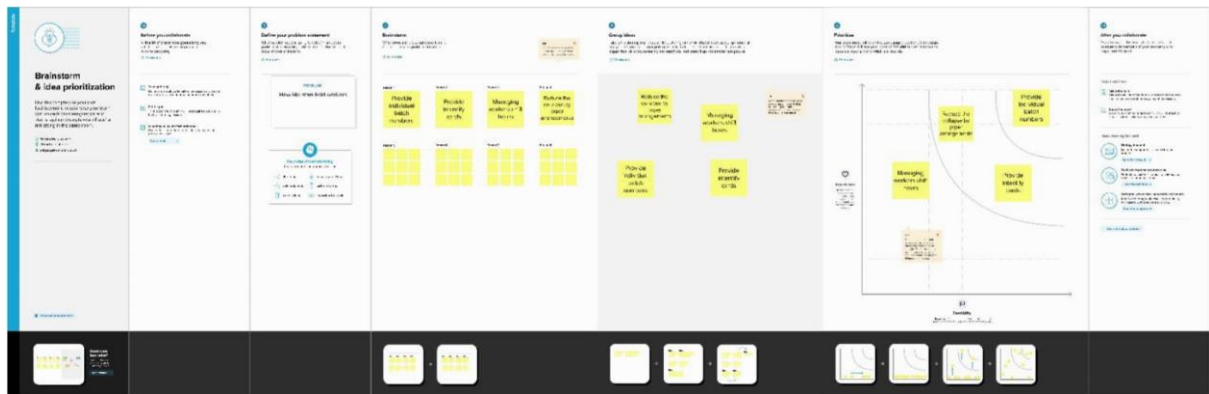
PURPOSE :-

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

EMPATHY MAP :-



IDEATION AND BRAINSTORM MAP :-



DATA TABLE :-

Object-1 Lead Field	Field label	Data type
	Lead	Auto number
	State	Picklist
	City	picklist
	Email	Email
	Phone	Phone
Object -2 Buy	Field label	Data type
	Create Property Type	Picklist
	Discount	Percentage
	State	Picklist
	City	Field dependency

Object -3 Field for Rent	Field label	Data type
	Rent	Auto number
	Rental City	Text
	BHK type	Picklist
Object -4 Field for Loan	Field label	Data type
	Loan Id	Auto number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number

ACTIVITY :-

Home | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

SETUP Home

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 items

NAME	TYPE	OBJECT
Lead	Custom Field Definition	Rent

Buy | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p5U8/Details/view

Search Setup

Setup Object Manager

SETUP > OBJECT MANAGER

Buy

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

Details

Edit Delete

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

Buy | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003p5U8/Details/view

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
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Details

EditDelete

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

https://physics52-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003p5U8/Details/view

Rent | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003p5UN/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Rent

Details

- Fields & Relationships
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EditDelete

Description

API Name
Rent__c

Custom

Singular Label
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Enable Reports

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Deployed

Help Settings
Standard salesforce.com Help Window

javascriptvoid(0);

Loan | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p5UX/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Loan

Details

Fields & Relationships

Page Layouts

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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

javascriptvoid(0);

Tabs | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Search Setup

Setup Home Object Manager

Q tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tab Limit

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

SETUP

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Buyers	Phone	
Edit Del	Loans	Building	
Edit Del	Rents	Motorcycle	

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

App Manager | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app man

Apps

App Manager

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

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

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

	App Name	Developer ...	Descr...	Las...	App Type	Vi...
1	All Tabs	AllTabSet		14/03/...	Classic	
2	Analytics Studio	Insights	Build CR...	14/03/...	Classic	✓
3	App Launcher	AppLauncher	App Laun...	14/03/...	Classic	✓
4	Bolt Solutions	LightningBolt	Discover ...	14/03/...	Lightning	✓
5	Community	Community	Salesforc...	14/03/...	Classic	✓
			Salesforc...	14/03/...	Classic	✓

Buy | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p5U8/FieldsAndR...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Buy

Details

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy Name	Name	Text(80)		✓
City	City__c	Picklist	State	
Create Property Type	Create_Property_Type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Lead	Lead__c	Auto Number		

Loan | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p5UX/FieldsAndR...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Loan

Details

Fields & Relationships
16 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)		
City	City__c	Picklist		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Lead	Lead__c	Auto Number		
Loan Name	Name	Text(80)		✓

https://physics52-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0112w000003p5UX/FieldsAndRelationships/view

Rent | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p5UN/FieldsAnd...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Rent

Details

Fields & Relationships
12 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 type	BHK_type__c	Picklist		
City	City__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Lead	Lead__c	Auto Number		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

https://physics52-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0112w000003p5UN/FieldsAndRelationships/view

Profiles | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

prof

Users

Profiles

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

Profiles

[All Profiles](#) [Edit](#) [Delete](#) [Create New View](#)

[New Profile](#)

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>

1-25 of 42 0 Selected

Page 1 of 2

Users | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
 - Data.com
 - Prospector Users
- User Interface
 - Action Link Templates
 - Actions & Recommendations
 - App Menu

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [All Users](#) [Edit](#) [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Export	Chatter	chathv.00d2w00000rkctveat.ve4becceizkm@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	S. Sanjaykhan	SS	smsanjiav@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	S. Sanjaykhan	ss	sanjaykhan1513@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Marketing User
Edit	User Integration	integ	integration@00d2w00000rkctveat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d2w00000rkctveat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

https://physics52-dev-ed.develop.lightning.force.com/one/one.app#/setup/ManageUsers/home

Sharing Settings | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Search Setup

SetupHomeObject Manager

sharing

Security

Sharing Settings

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

SETUP

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

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓

Organization-Wide Defaults Help

Reports | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrn

Search...

Property Manager

...d.develop.lightning.force.com wants to Show notifications

AllowBlock

Reports

Recent

6 items

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Report Name	Description	Folder	Created By	Created On	Subscribed
New Accounts with Assets Report		Private Reports	Sanjaykhan S	7/4/2023, 12:13 pm	
New Accounts Report		Private Reports	Sanjaykhan S	7/4/2023, 12:35 pm	
New Account with Account Teams Report		Private Reports	Sanjaykhan S	7/4/2023, 12:16 pm	
New Leads Report		Private Reports	Sanjaykhan S	7/4/2023, 12:23 pm	
New Accounts Report		Private Reports	Sanjaykhan S	7/4/2023, 12:19 pm	
New Accounts Report		Private Reports	Sanjaykhan S	7/4/2023, 11:54 am	

New ReportNew Folder

Reports | Salesforce

physics52-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

Property Managem... Leads Buyers Rents Loans Reports

Reports

Recent

6 items

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Accounts with Assets Report		Private Reports	Sanjaykhan S	7/4/2023, 12:13 pm	
Created by Me	New Accounts Report		Private Reports	Sanjaykhan S	7/4/2023, 12:35 pm	
Private Reports	New Account with Account Teams Report		Private Reports	Sanjaykhan S	7/4/2023, 12:16 pm	
Public Reports	New Leads Report		Private Reports	Sanjaykhan S	7/4/2023, 12:23 pm	
All Reports	New Accounts Report		Private Reports	Sanjaykhan S	7/4/2023, 12:19 pm	
FOLDERS	New Accounts Report		Private Reports	Sanjaykhan S	7/4/2023, 11:54 am	
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Recently Viewed | Leads | Sales

physics52-dev-ed.develop.lightning.force.com/lightning/o/Lead/list?filterName=Recent

Search...

Property Managem... Leads Buyers Rents Loans Reports

Leads

Recently Viewed

1 item • Updated a few seconds ago

New Import Add to Campaign Change Status Change Owner

Search this list...

	Name	Title	Company	Phone	Mobile	Email	Lead Status	Owner ...
1	Sanjaykhan Sankar	Physics	Thiru. Vi. Ka	9843037348	9843037348	smsanjay1513@gmail.com	Open - Not Contacted	SS

https://physics52-dev-ed.develop.lightning.force.com/lightning/o/Lead/home

Recently Viewed | Buyers | Sales X +

physics52-dev-ed.develop.lightning.force.com/lightning/o/Buy_c/list?filterName=Recent

Property Management... Leads Buyers Rents Loans * Reports X

Buyers Recently Viewed

1 item • Updated a few seconds ago

Search this list...

Buy Name

1	Motorcycle
---	------------

https://physics52-dev-ed.develop.lightning.force.com/lightning/o/Buy_c/home

Recently Viewed | Rents | Sales X +

physics52-dev-ed.develop.lightning.force.com/lightning/o/Rent_c/list?filterName=Recent

Property Management... Leads Buyers Rents Loans * Reports X

Rents Recently Viewed

1 item • Updated a few seconds ago

Search this list...

Rent Name

1	House
---	-------

https://physics52-dev-ed.develop.lightning.force.com/lightning/o/Rent_c/home

The image shows two screenshots of a Salesforce interface. The top screenshot displays the 'Recently Viewed' page for 'Loans', showing a single item 'Bike Loan'. The bottom screenshot displays the 'Dashboards' page, showing a list of recent dashboards.

Top Screenshot: Recently Viewed Loans

URL: https://physics52-dev-ed.develop.lightning.force.com/lightning/o/Loan_c/list?filterName=Recent

Search: Search...

Buttons: New, Import, Change Owner

Search this list: Search this list...

1 item • Updated a few seconds ago

Loan Name
1 <input type="checkbox"/> Bike Loan

Bottom Screenshot: Dashboards

URL: <https://physics52-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mr>

Search: Search...

Buttons: New Dashboard, New Folder

Search recent dashboards: Search recent dashboards...

9 items

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	New lead with loan amount		Private Dashboards	Sanjaykhan S	8/4/2023, 9:38 pm	<input type="checkbox"/>
Created by Me	New lead with loan amount		Private Dashboards	Sanjaykhan S	7/4/2023, 12:55 pm	<input type="checkbox"/>
Private Dashboards	New lead with loan amount		Private Dashboards	Sanjaykhan S	7/4/2023, 12:42 pm	<input type="checkbox"/>
FOLDERS	Mysterious world		Private Dashboards	Sanjaykhan S	7/4/2023, 12:21 pm	<input type="checkbox"/>
All Folders	Mysterious world		Private Dashboards	Sanjaykhan S	7/4/2023, 12:20 pm	<input type="checkbox"/>
Created by Me	Mysterious world		Private Dashboards	Sanjaykhan S	7/4/2023, 12:17 pm	<input type="checkbox"/>
Shared with Me	Mysterious world		New lead with loan amount	Sanjaykhan S	7/4/2023, 12:04 pm	<input type="checkbox"/>
FAVORITES	Mysterious world		Private Dashboards	Sanjaykhan S	7/4/2023, 12:01 pm	<input type="checkbox"/>
All Favorites	sskhan		Private Dashboards	Sanjaykhan S	7/4/2023, 11:57 am	<input type="checkbox"/>

4 Trialhead Profile Public URL

Team Lead – <http://trailblazer.me/id/smsanjay1513>

Team member 1- <https://trailblazer.me/id/mugeshmd>

Team member 2- <https://trailblazer.me/id/mramesh49>

Team member 3- <https://trailblazer.me/id/mdmano>

Team member 4- <https://trailblazer.me/id/yovea>

5 ADVANTAGE & DISADVANTAGE

ADVANTAGE

You Will Work With Someone Who Has Experience. By choosing to work with a professional, you are choosing to work with someone who has all the correct knowledge. When you hire experienced property managers, like our team at Harper Properties, you can rest easy knowing that your properties are in the hands of people who know exactly what they are doing. **DISADVANTAGE**

They Will Cost Money. Naturally, you will need to pay your selected property management company. Even though their services are very helpful, some people may be deterred by their payment. However, it would be best to keep in mind that property managers can save you money by keeping tenants happy and having properties stay vacant for shorter amounts of time.

6 APPLICATION

You Will Have A Lot More Time For Yourself. One of the best advantages of hiring a property manager is that you will be able to enjoy a lot more free time. Instead of stressing over little things, you can trust your manager

7 CONCLUSION

You Will Work With Someone Who Has Experience. By choosing to work with a professional, you are choosing to work with someone who has all the correct knowledge.

8 FUTURE SCOPE

Some of the drawbacks are rectified in future development .