

# PROPERTY RENTAL MANAGEMENT SYSTEM magicbricks

By: Group H

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## Cognizant provides a platform for MAGIC BRICKS to run their business efficiently.

#### Features:

- Flexible application to customize easily.
- Can be used from any location.
- On Cloud platform.
- Flexible in payments (pay as per use).
- No Infrastructure to be needed.
- Quick Deployment.

## Story 1:

#### What is CRM?

- A CRM system is a business tool that allows you to manage all your customers, partners and prospects information all in one place.
- Customer Relationship Management (CRM) is a strategy for managing all your company's relationships and interactions with your customers and potential customers. It Helps you improve your profitability.
- CRM enables you to focus on your organization's relationships with individual people whether those are customers, service users, colleagues or suppliers.



#### What is Salesforce?

Salesforce is a cloud-based platform that provides software and services to create relevant customer experiences. Starting as Software-as-a-service(SaaS), Salesforce is based on a multi-tenant architecture that has benefits such as API Integration, configuration, scalability, free capacity, low-cost ownership, platform support, and more.

Salesforce is one of the best Customer Relationship Management(CRM) service providers and also provides Artificial Intelligence(AI) platform for marketing automation, financing, Human resource management, etc.



As a widely used CRM tool, Salesforce benefits both small and large businesses. It breaks down the organization's operations and allows the employees to have a single customer view of various departments.

All these services allow a business to use the latest technologies, find potential customers, and provide a better experience.

#### **Features of Salesforce**

Salesforce has started as a CRM (Customer Relationship Management) platform, but now it has extended its services in various fields, from Artificial Intelligence to the Internet of Things. Salesforce features cover all the aspects of a business such as Lead Management, Email Integration, Sales Collaboration, etc. In this topic, we will discuss the popular features of salesforce.



#### 1. Account and Contact Management

The account and contact management feature of Salesforce provides the complete information of each customer. It includes the *activity history of each customer, communications done with customers, Key contacts*, etc. In simple words, it contains all the information related to customer communication.

#### 2. Opportunity Management

It enables us to manage all the sales deals with the Salesforce and keep connected with the people and information required to complete every deal. It also includes the stage of every deal and what move should we need to take to win the specific deal.

#### 3. Sales Collaboration

The sales collaboration feature allows the sales team to collaborate with powerful social tools in Salesforce. It also helps to find the experts for sales, share competitive data among the team, etc., to

grow the business from anywhere. It allows the sales teams to work together on various sales opportunities and check progress from anywhere.

#### 4. Sales Performance Management

Sales performance management is mostly categorized as compensation management, which varies due to different software tools. This improves the execution of the sales process day-by-day. It provides a metric-based goal setting for the teams and helps the sales team with continuous feedback and rewards.

#### 5. Lead Management

The lead management software solution helps the business by giving information on how the marketing activities impact the sales pipelines. It helps to invest our time in the crucial and trending deals firstly.

#### 6. Salesforce Mobile App

Salesforce Mobile app makes our mobile device a portable sales office. It allows us to make calls, reply to each hot lead, work opportunities, and to see the checkerboards from anywhere. We can manage meetings, events, and account updates from a single app. Salesforce CRM can be accessed and updated from anywhere with the help of the salesforce mobile app.

#### 7. Workflow and Approvals

It allows us to design and automate any business process with the drag-drop option of the visual workflow. It provides flexible approval processes for the sales discount, expenses, etc. It allows business processes to be completed automatically.

#### 8. Sales Forecasting

This feature helps you to get the real-time observations of the entire team's forecast. We can also track the leader-board to know the top performer of the target. It provides a complete view of business so that we can take the required action if necessary.

#### 9. Reports and Dashboards

The dashboard provides a real-time view of the business at a glance. It allows us to create sales forecasting reports without any help from the IT person.

#### 10. Email Integration

Salesforce email-tracking software can be integrated with the Outlook CRM and Gmail to synchronize the contacts, events, and everything to work faster. With the help of Salesforce lightning, we can easily sync our important emails instantly to Salesforce, and it also provides a complete view of the connected customers. The salesforce email composer helps us to compose and send an email to any important contact instantly from anywhere.

## Story 2:

#### Questions

- 1. What all Business processes do they want to execute on Salesforce?
- 2. How many users use Salesforce Platform?
- 3. How many departments will be using salesforce and detail of department wise members?
- 4. What is the role of each user?
- 5. How is organization Hierarchy?
- 6. Which department / user department will be able to access what data?
- 7. Various types of business data will be stored in salesforce?
- 8. How many profiles we create & which profiles will assign to users?
- 9. Which type of relation is used between two objects?
- 10. How can we restrict the input in a table field or a control (such as a text box) on a form?

# Story 3:

#### 1. Objects

- Property
- Prospective Tenants (Standard Lead Object)
- Accounts (Standard Account Object)
- Tenant (Standard Contact Object)
- Owner
- Rental Agreement
- Maintenance (Use Standard Case Object)

#### 2. Relationships



#### 3. Roles

Tom - Property Manager,

John - Operations Manager,

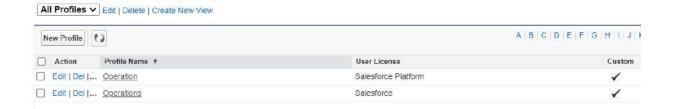
Harry - Supervisor,

Julia - Sales Executive,

Robert - Marketing Executive.

#### 4. Profiles

#### **Profiles**



# **Profiles**

All Profiles ➤ Edit | Delete | Create New View



# **Profiles**

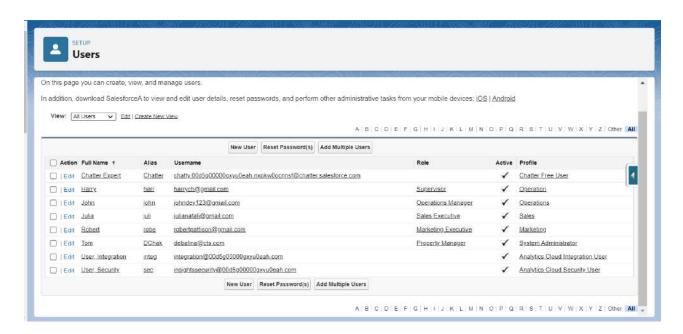
All Profiles ✓ Edit | Delete | Create New View



#### 5. Role Hierarchy



#### **Users:**

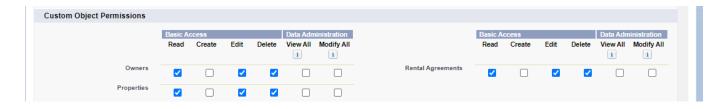


#### 6. Object access for various profiles

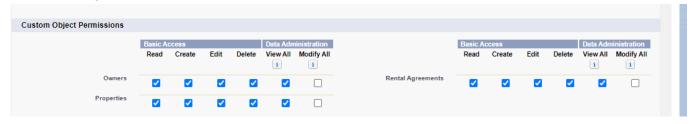
#### Users - Tom:



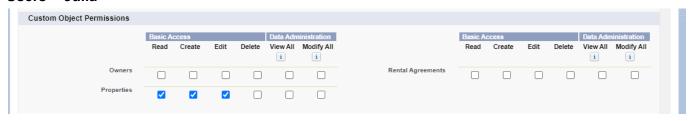
#### **Users - John**



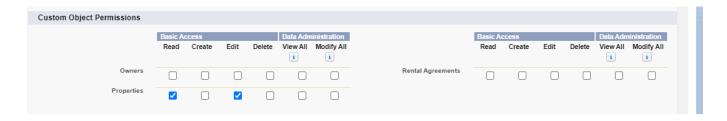
#### **Users - Harry**



#### Users - Julia

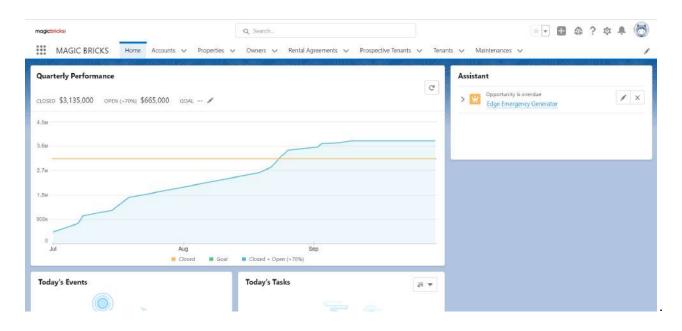


#### **Users- Robert**

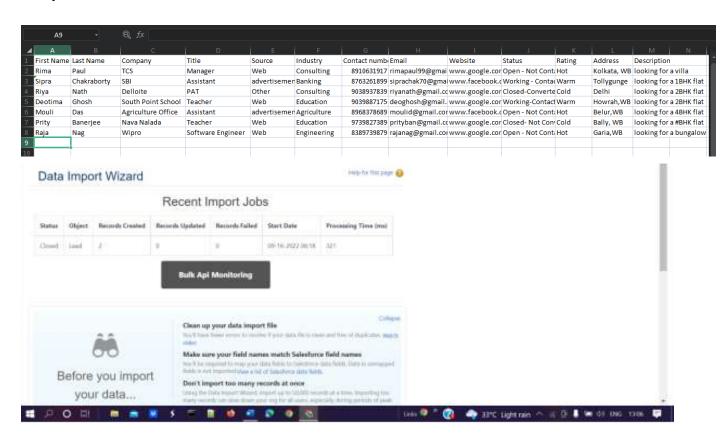


# Story 4:

Client is "MAGIC BRICKS" so the App name will be MAGIC BRICKS with their logo



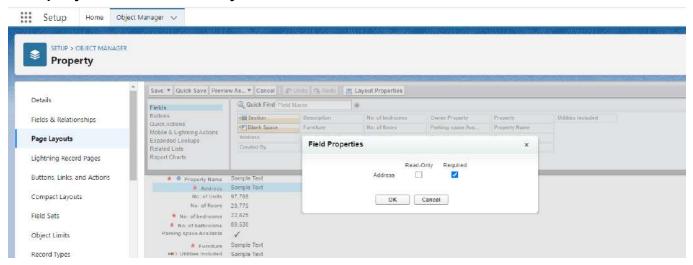
#### **Prospective Tenants CSV**



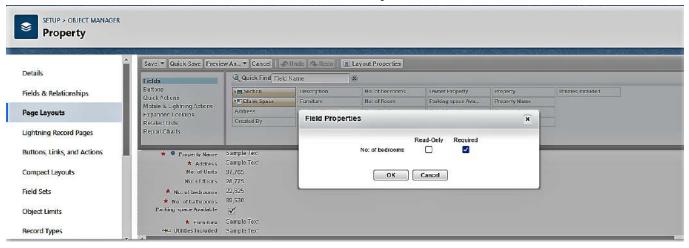
# Story 5:

#### **Data Cleaning Process: Property**

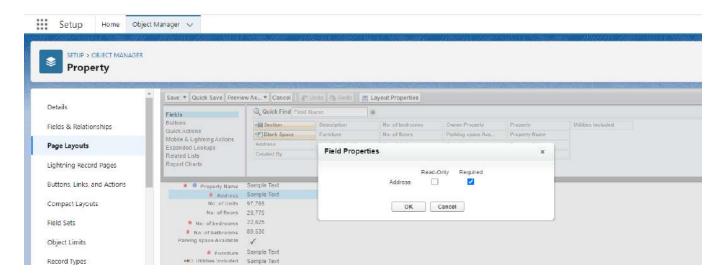
1. Property address is mandatory.



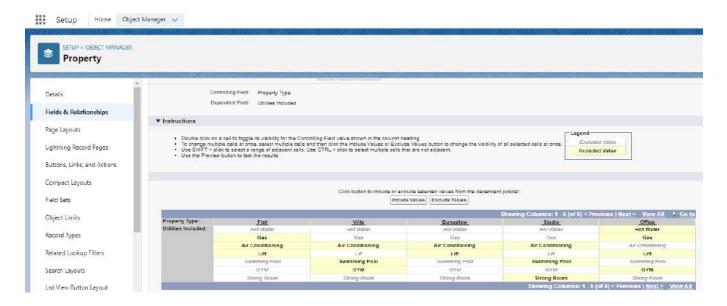
2. Both no: of bedrooms and bathrooms are mandatory.



#### 3. Furniture and property are mandatory



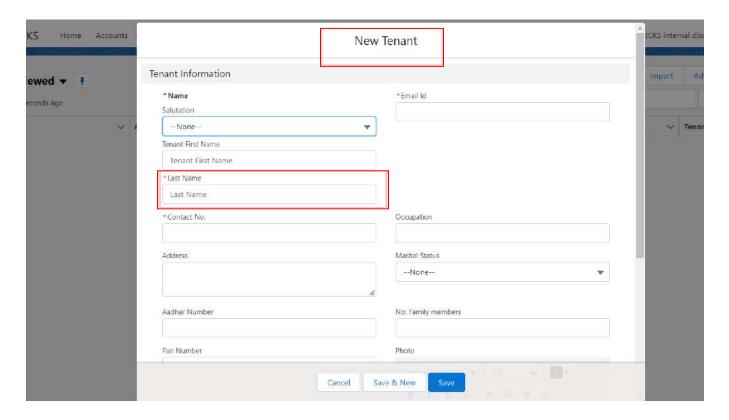
#### 4. Only Available utilities are to be included.



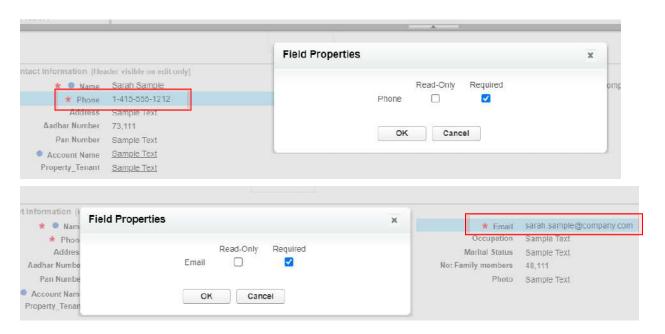
# Story 6:

#### **Data Cleaning Process: Tenant**

1. Tenant's last name is required.



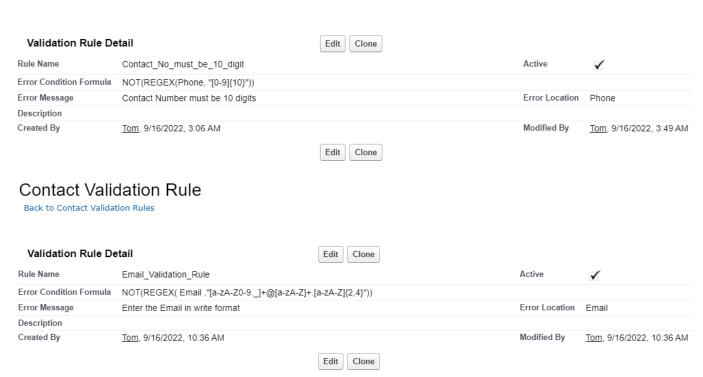
2. Both phone number and email id are mandatory.



# 3. Contact number is always a 10-digit number and email should be of the prescribed format only.

#### Contact Validation Rule

Back to Contact Validation Rules



4. Either Aadhaar or Pan is mandatory And 5. Aadhar and PAN should be of prescribed format.



# Story 7:

#### **Data Cleaning Process: Owner**

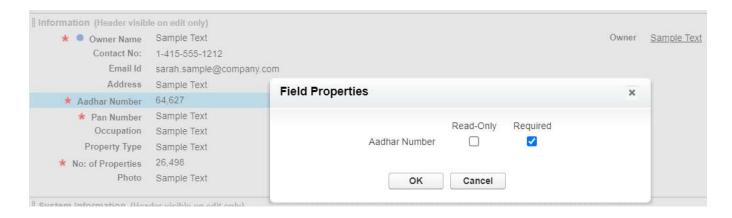
1. Owner's last name is required.

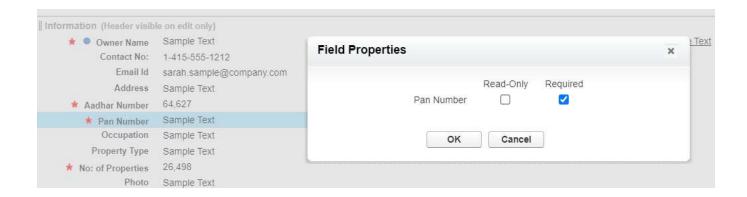


2. Either phone number or email id are mandatory and 3. Contact number is always a 10-digit number and email should be of the prescribed format only.



4. Both Aadhar and PAN is mandatory.

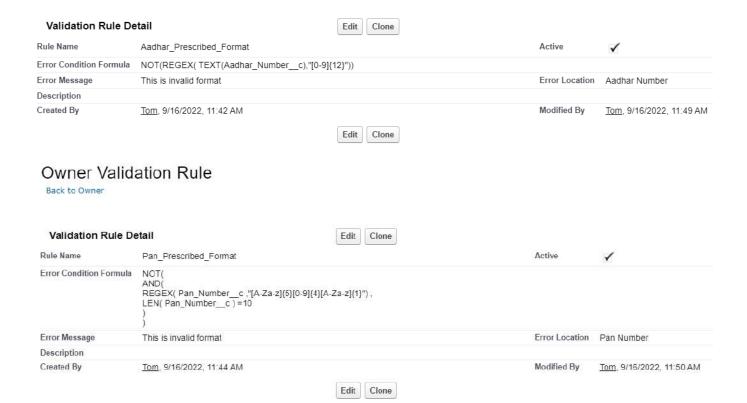




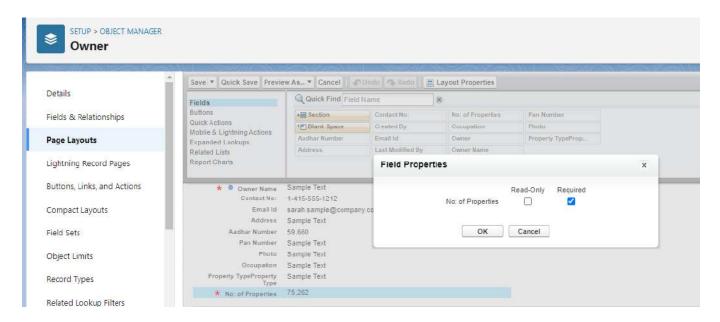
#### 5. Aadhar and PAN should be of prescribed format.

#### Owner Validation Rule

Back to Owner



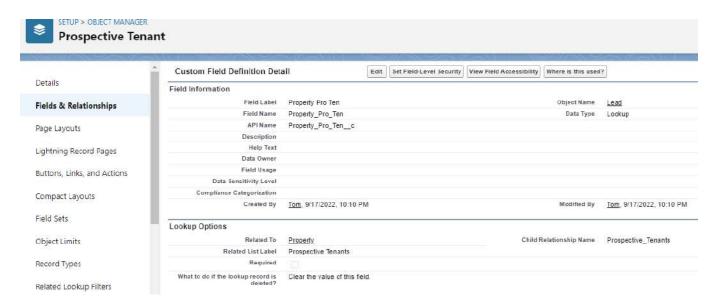
#### 6. No: of properties is required.



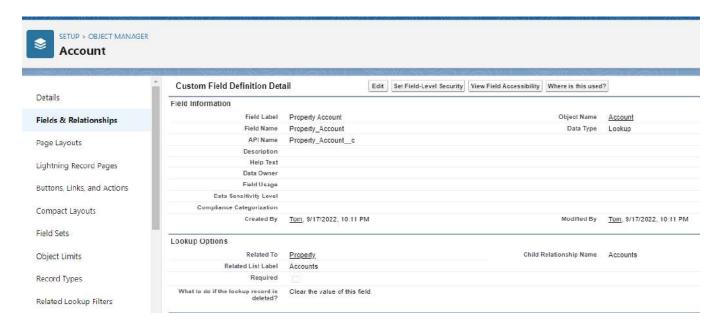
# Story 8:

### Look up Relationship:

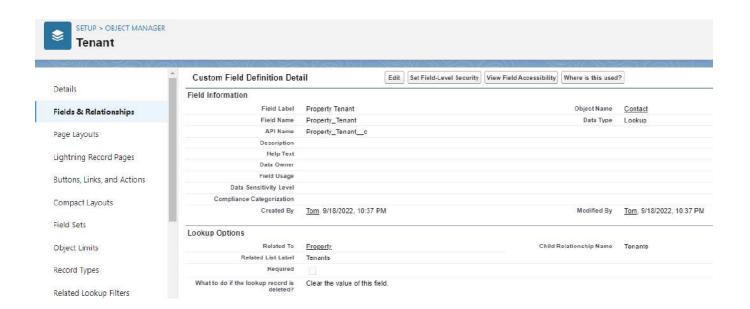
#### **Property to Prospective Tenant**



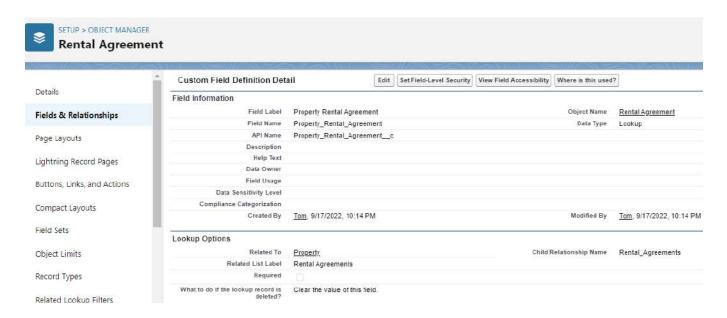
#### **Property to Account**



#### **Property to Contact**



#### **Property to Rental Agreement**



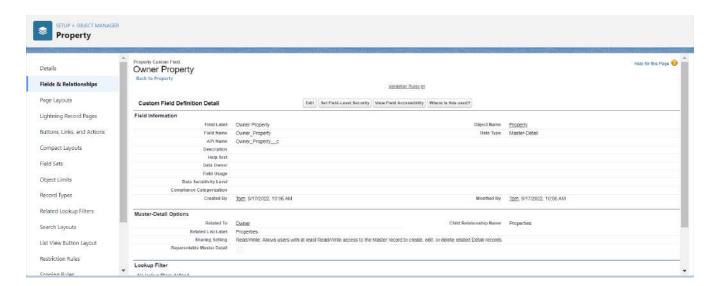
#### **Tenant to Rental Agreement**



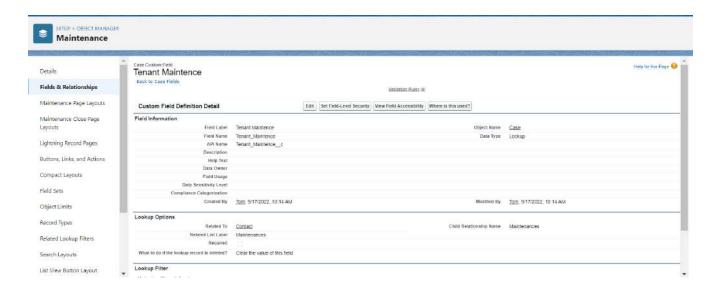
#### **Owner to Rental Agreement**



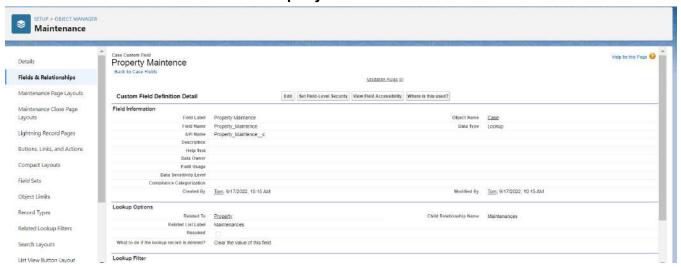
#### Owner to Property (Master Detail Relationship)



#### **Tenant to Maintenance**



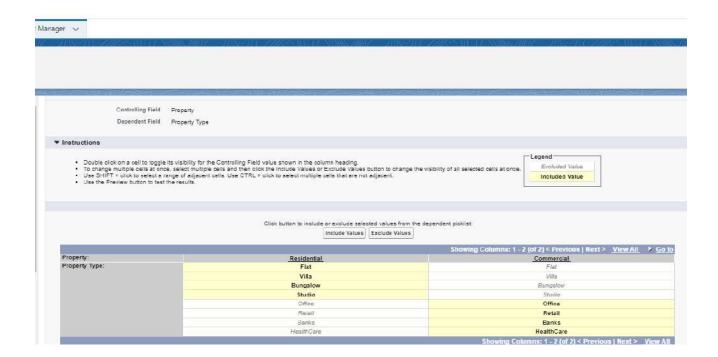
#### **Property to Maintenance**



# Story 9:

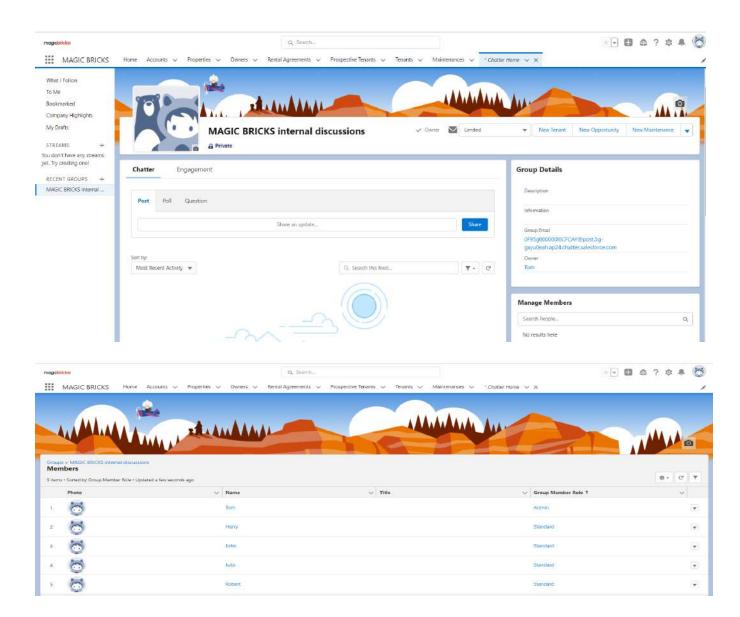
Business asked us to provide solutions for ensuring the record will have some fixed population of data based on some scenarios. We need to find out what is the way by which we can achieve this:

- We need to create field dependent Picklist for Property and Property type Where if property is Residential then the values must be Flat, Villa, Bungalow and Studio.
- If it is Commercial then the values must be Office, Retail, Banks and Healthcare.



# Story 10:

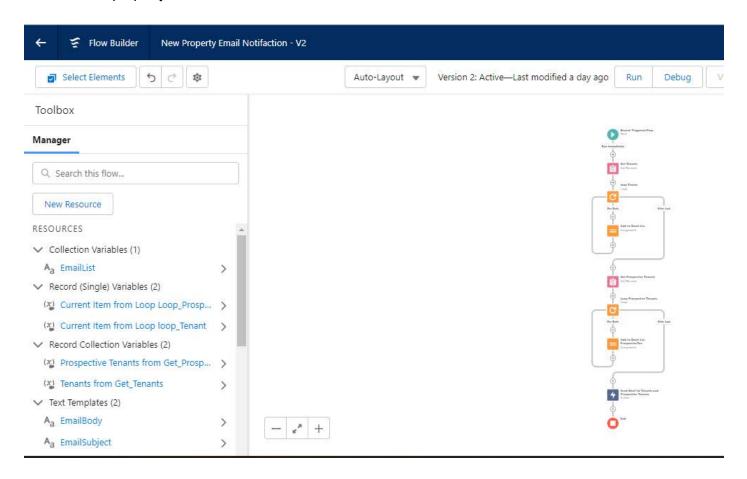
#### MAGIC BRICKS Internal Discussions Platform

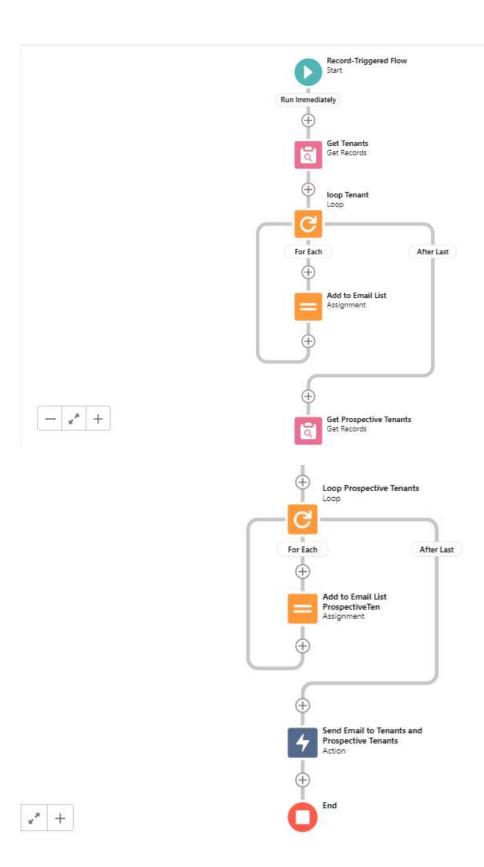


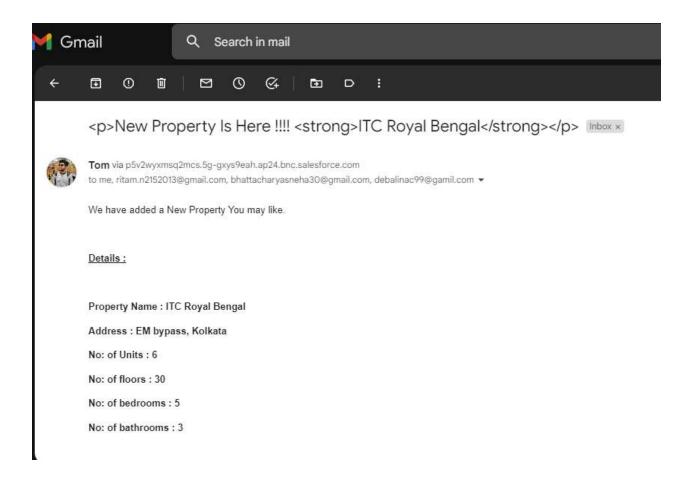
# Story 11:

Client wants to send an email whenever a new Property record is created in the Property Details with the details of the Property to various Prospective Tenants (We can use Lead object for this) interested in our organization.

An email is also sent to the Tenants regarding the property along with the details if they have any idea to shift to a new property.

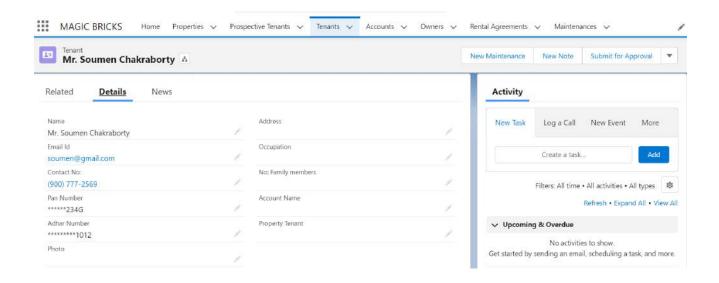


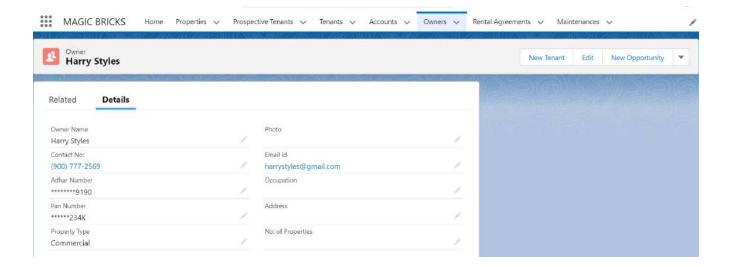




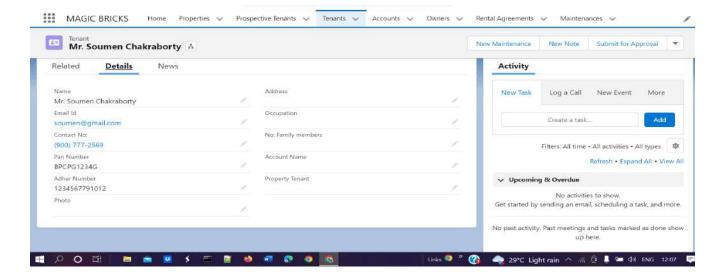
## Story 12:

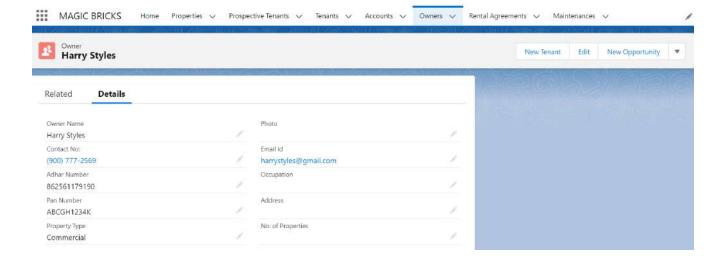
"Aadhar Card Number" and "Pan Card Number" from Tenant and Owner should be shown to no one in the Organization. Only last 4 letters are to be shown.





#### It should be visible only for Property Manager and Operations Manager

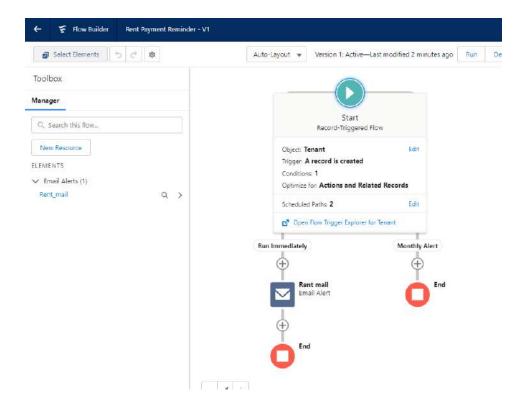




# Story 13:

Client said, automated email is to be sent to the Tenants, regarding the Rent to be paid in the first week of every month along with maintenance. If the amount is paid before 5th of every month, then 10% of the total amount can be considered as the discount to be added to the next month rent so that they would spread positive talk about "MAGIC BRICKS". In this email we need to

keep the Property Manager and Operations Manager as CC.



#### **Email Template**

Send Test and Verify Merge Fields

Subject Due Rent reminder - MAGIC BRICKS

Plain Text Preview

Hi!! {!Contact.FirstName},

Magic Bricks hopes you are having a great day.

Rent payment information:

If the amount is paid before 5th of every month, then 10% of the total amount can be considered as the discount to be added to the next month rent

Thanks and regards MAGIC BRICKS



## Due Rent reminder - MAGIC BRICKS Inbox ×



Tom via 2sav4ltih65.5g-gxys9eah.ap24.bnc.salesforce.com

to me 🕶

Hill Rohit,

Magic Bricks hopes you are having a great day.

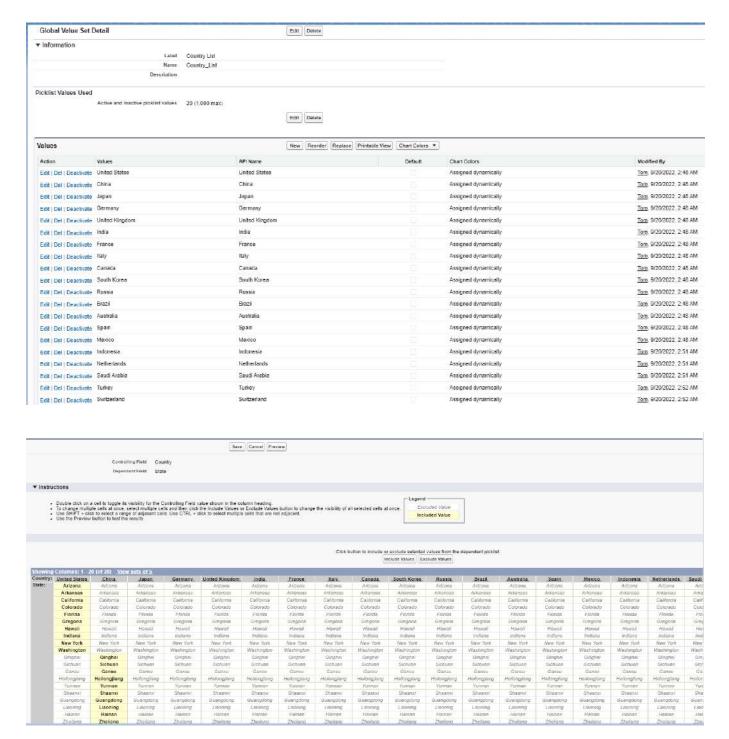
Rent payment information:

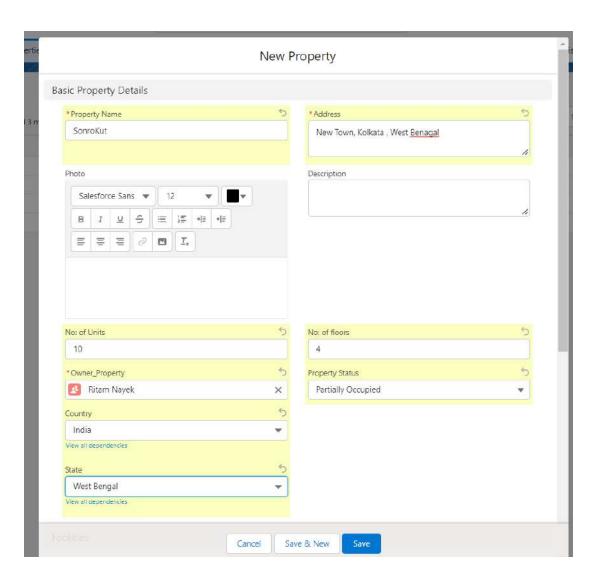
If the amount is paid before 5th of every month, then 10% of the total amount can be considered as the discount to be added to the next month rent

Thanks and regards MAGIC BRICKS

## Story 14:

Management realised as business is expanding, we are making entries in many states as well as countries and many property types are being introduced. But whenever any new country is added into the list of business, we have to make changes in all objects and change the values of country related fields. This sometimes leading to human error. Management wants a quick process for that. So, by which we make one time change in country list and it should reflect in all country fields we are using across all objects. Implement this for countries, states and utilities.





# Story 15:

Client is annoyed with those employees who are making changes in the fields of the objects like Property Details Tenant and Owner.

Prevent all users except those with the System Administrator Profile from changing the related field if it is already populated.

#### **Profile - Operation**



#### **Profile - Operations**



#### **Profile - Marketing**



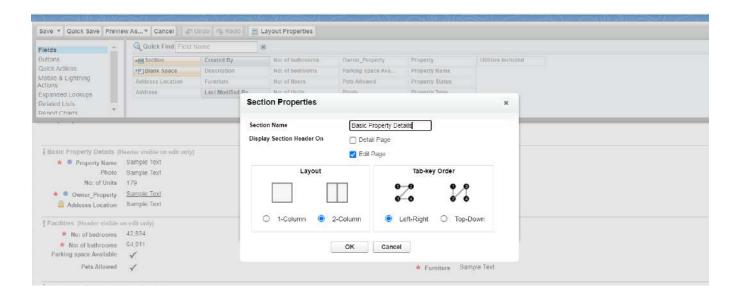
#### **Profile - Sales**



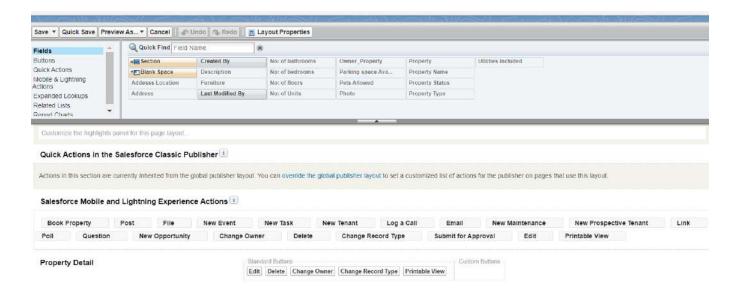
# Story 16:

Business wants a better look and feel for the standard pages that we are using for all objects in our project.

1. Every object record needs to be shown with 2 columns.

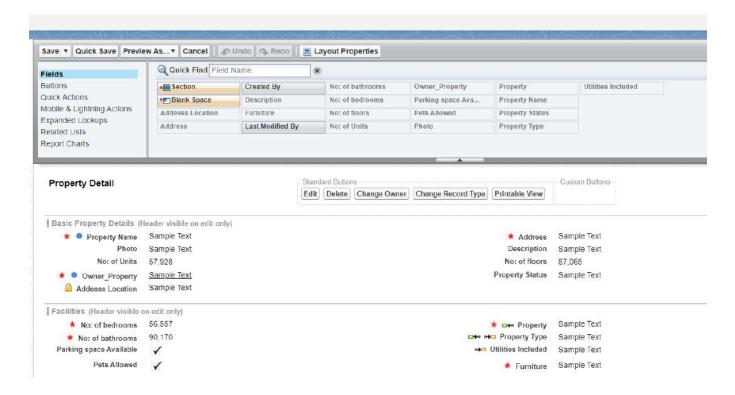


2. Clone button need not be available.

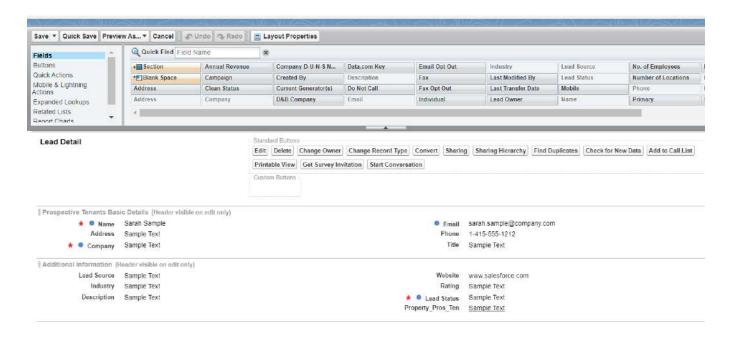


3. Create appropriate sections for all the objects in the application.

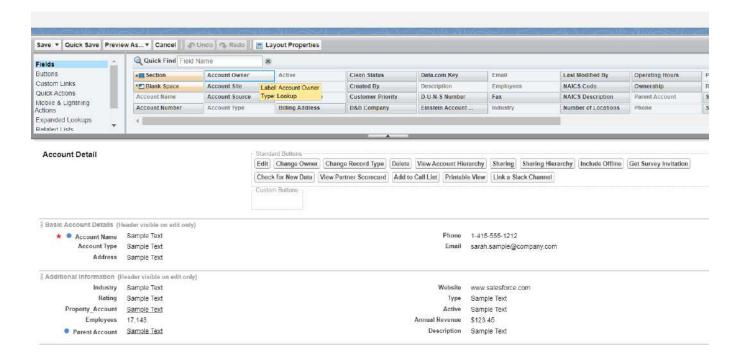
#### Property:-



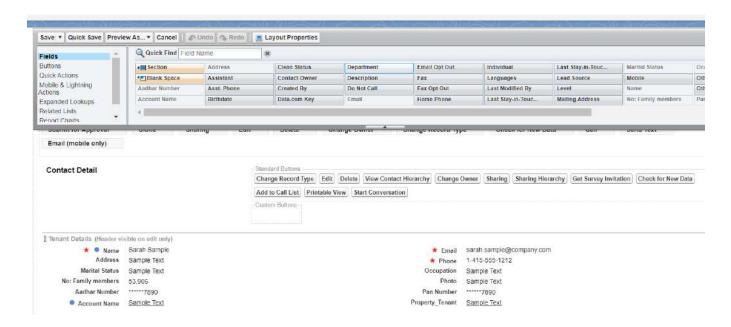
#### **Prospective Tenant:-**



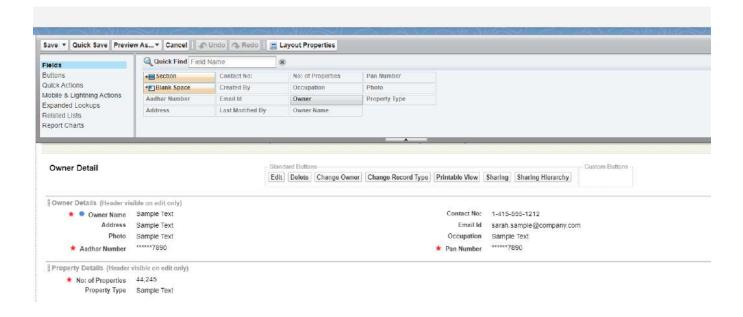
#### Account:-



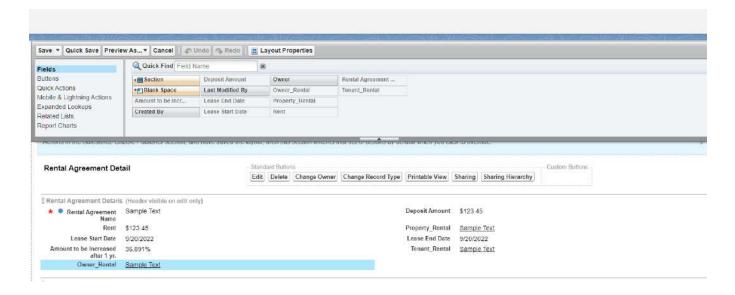
#### Tenant:-



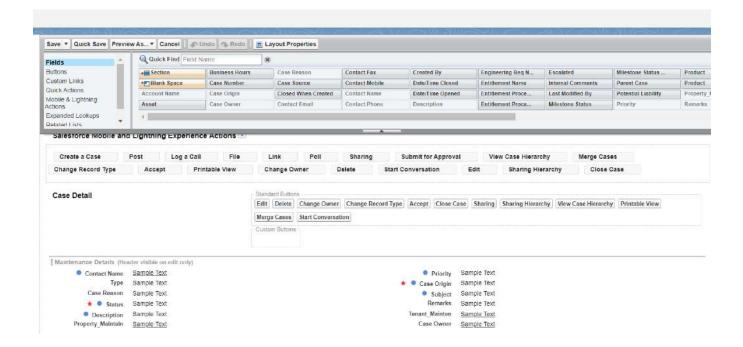
#### Owner:-



#### **Rental Agreement:-**



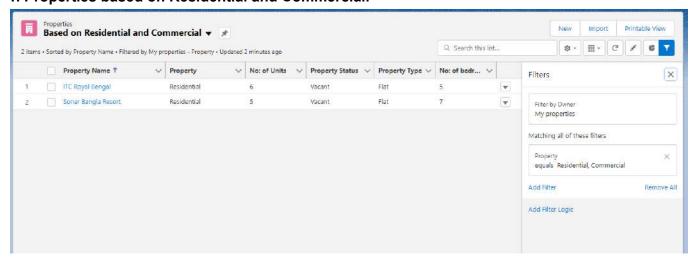
#### Maintenance:-



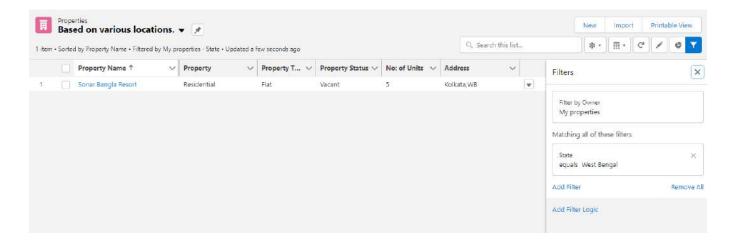
## Story 17:

Create various List views of Property Details based on the requirements.

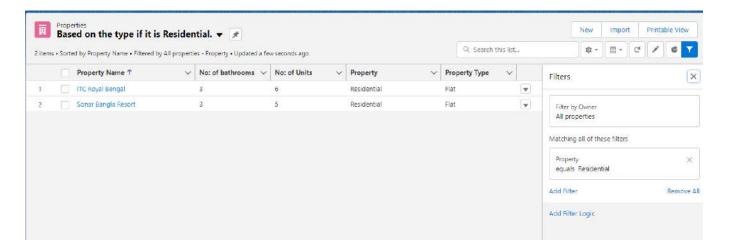
1. Properties based on Residential and Commercial.



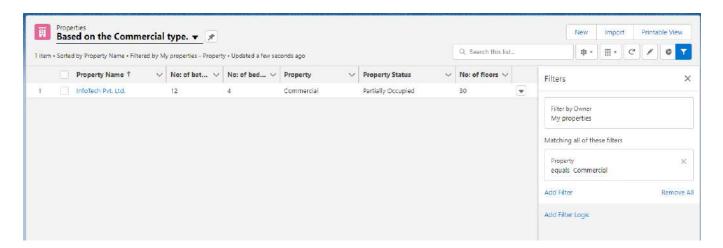
#### 2. Properties based on various locations.



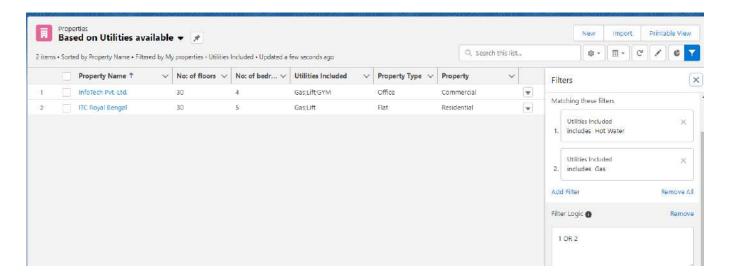
#### 3. Properties based on the type if it is Residential.



## 4. Properties based on the Commercial type.

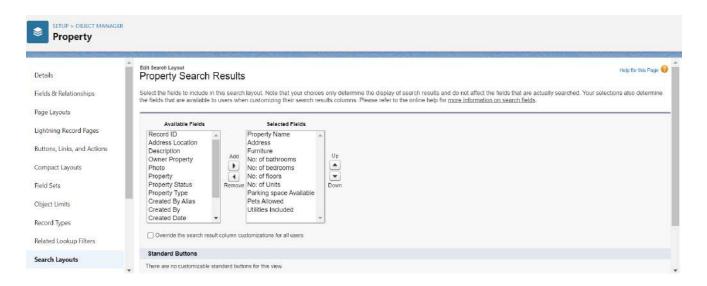


5. Properties based on the Utilities available in the property.

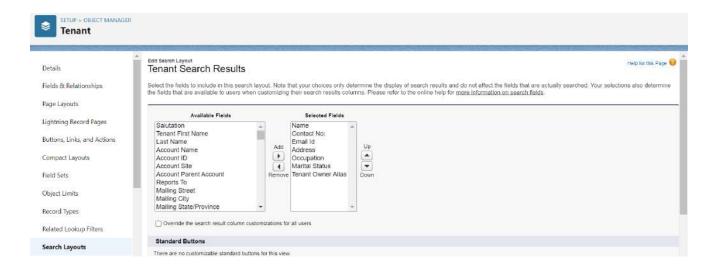


## Story 18:

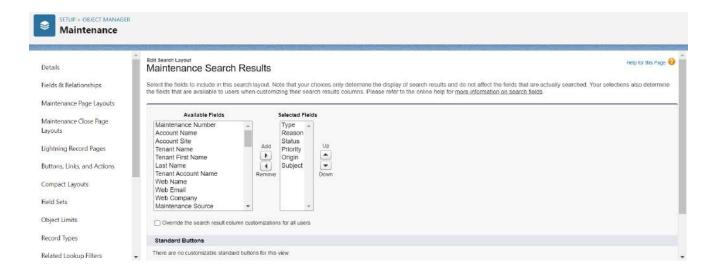
1. Create a Search layout for Property with Details.



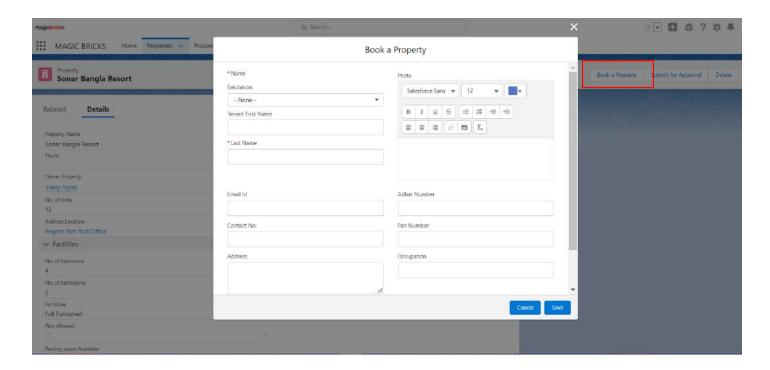
### 2. Create a Search layout for Tenants with Details.



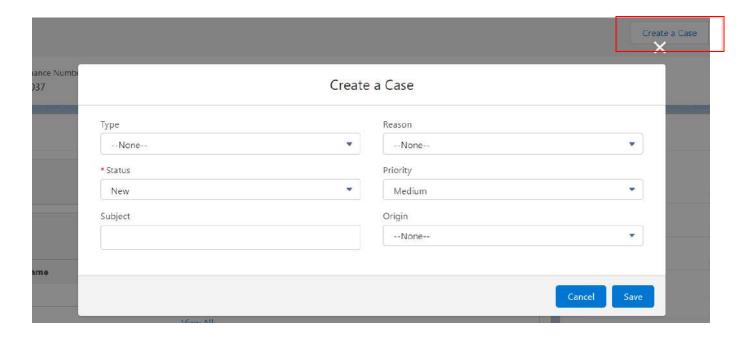
## 3. Create a Search layout for Cases with Details.



4. Create a Quick action to book a Property by the Tenant.



5. Create a Quick action to create a case on the Maintenance object.



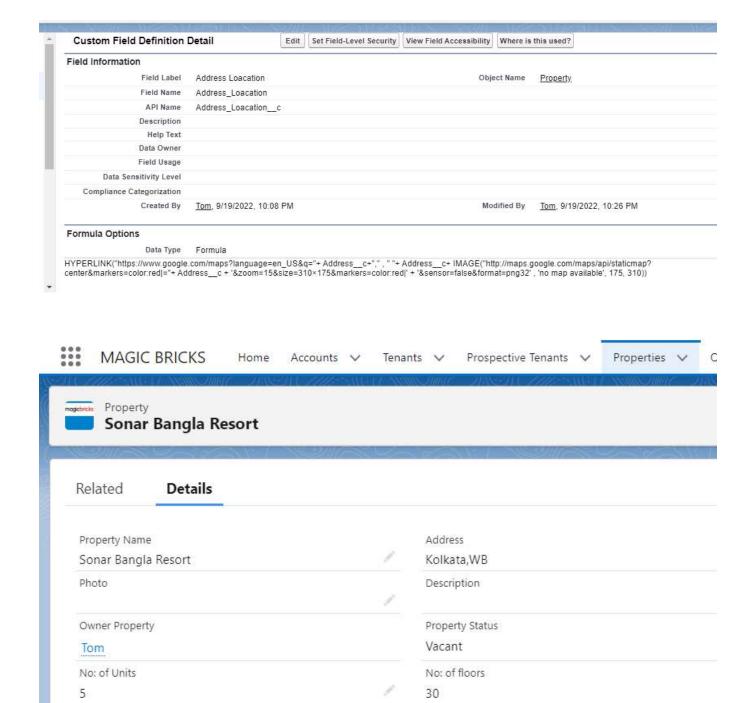
## Story 19:

Address Loacation

Country

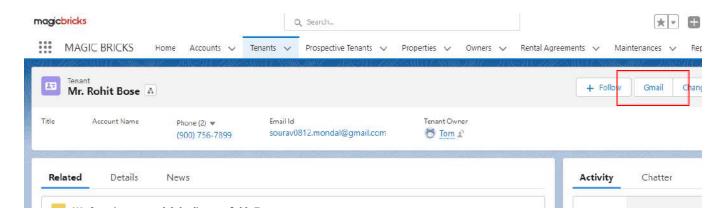
Kolkata,WB no map available

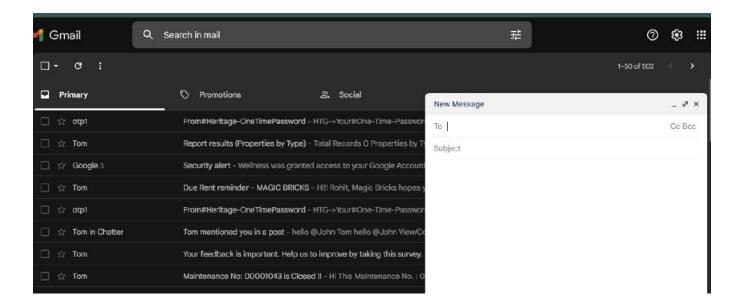
Searching the Property location based on Address fields of the Property and arrange a visit for the Tenant. Mostly Tenants as kfor Properties in their own flexible location.



## Story 20:

Custom button to show on record page which will open Gmail app





## Story 21:

Management has observed unexpected inputs coming from different users for some sensitive data like Property Details, Rental Agreement, Maintenance

When tried to understand the person behind this wrong data entry, management got no clue as multiple users are working on project. We are asked to provide a solution for them by which they can track the changes which are being done in these fields, with details like:

Username, Date of change, Previous value, Latest Value, Time of change

## **Property**



#### **Rental Agreement**

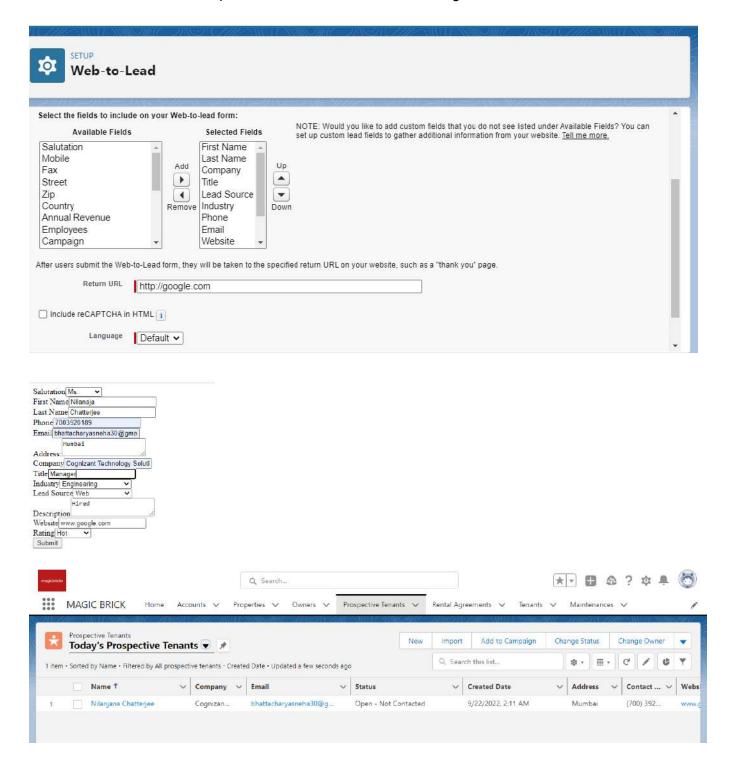


#### **Maintenance**



## Story 22:

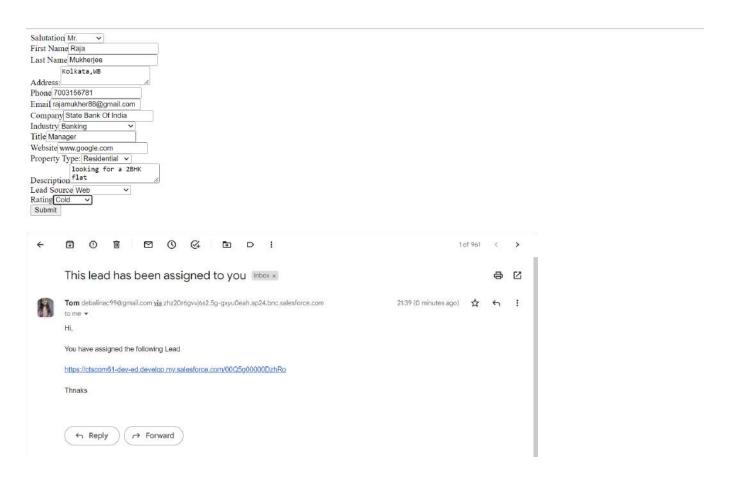
#### Prospective Tenant Record inserted using Web to lead

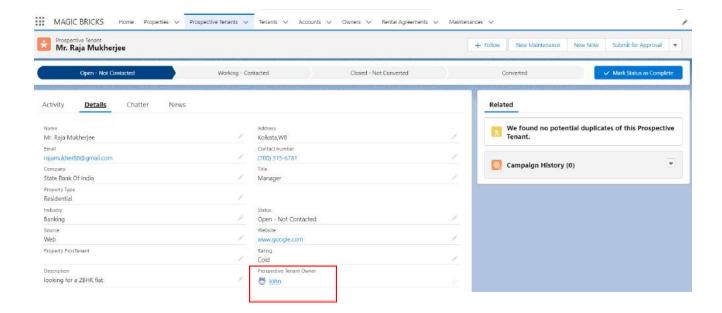


## Story 23:

Create picklist field "Property Type" on Lead objects with LOV's: Residential and Commercial. After your implementation of web to lead, client is happy with the current Setup. But client wants when lead is generated, then any lead which comes for property "Residential" those records to be assigned to John. Means John needs to be lead owner. And when service type is 'Commercial' then owner needs to be Tom. And also ensure both are getting emails about when any lead is assigned.

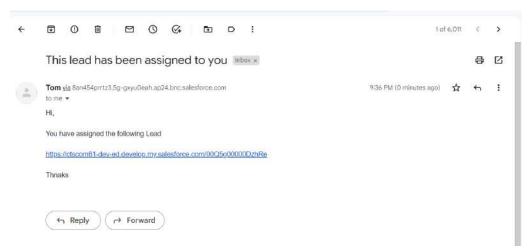
#### Residencial

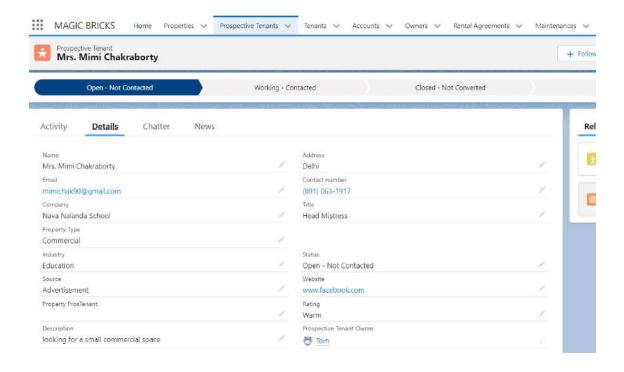


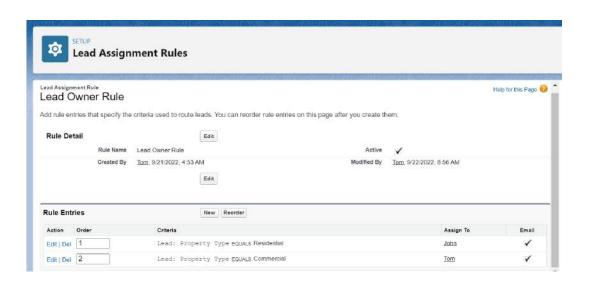


#### Commercial



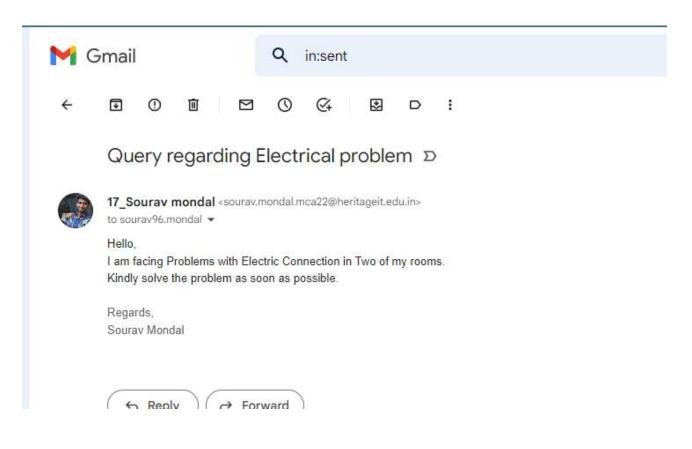


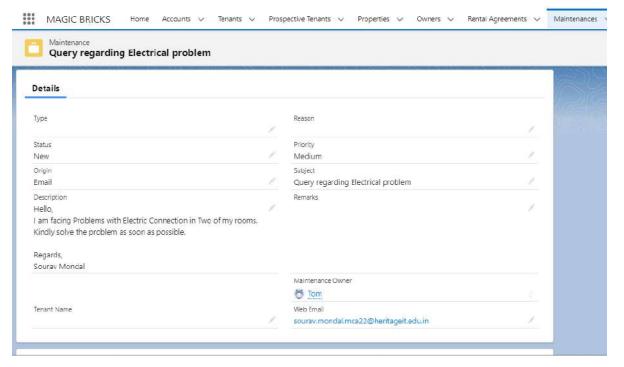




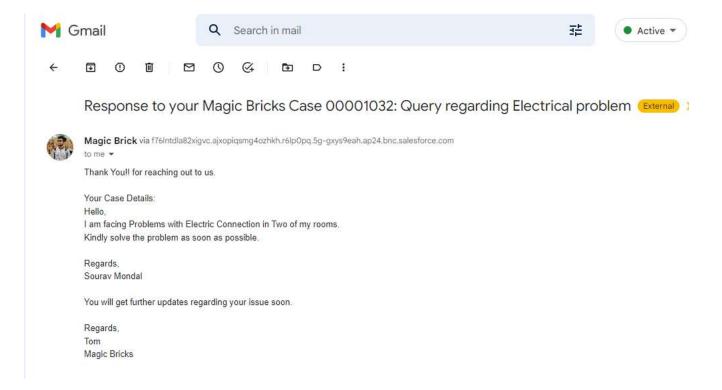
## Story 24:

Tenant can just send one email and Maintenance Record create in Salesforce environment using Email to Case





#### An auto response can be sent to the Tenant email as soon as he submits

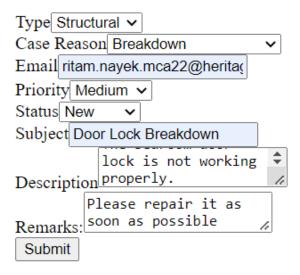


## Story 25:

Client wants to give more flexibility to Tenants to ensure company will provide them all possible services using salesforce platform. Client wants if any Tenant has any concern or issue about the services provided by "MAGIC BRICKS", tenant can just fill up the feedback form or complaint form in the company's website and the issue will be created in Salesforce environment.

Even an auto response can be sent to the Tenant email as soon as he submits the issue in the website. All the emails created in the Maintenance are to be assigned to the Operations Manager and Property Manager.

# Feedback Form



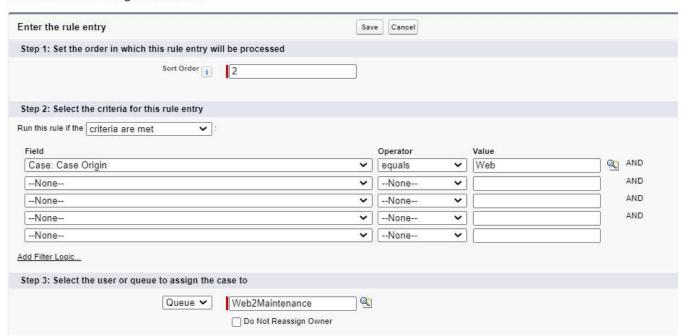
## Response to your Magic Brick Maintenance 00001037: Door Lock Breakdown



# Web2Maintenance



# Rule Entry Edit Maintenance Assignment Rule



# Story 26:

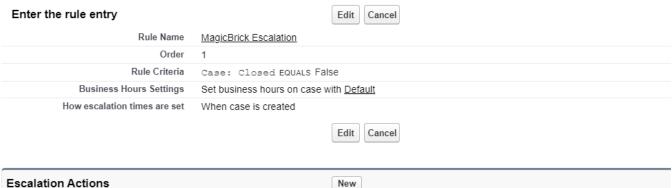
- 1. Case auto escalation
- 2. Only assign to that senior who has suitable licence to access Case Object.

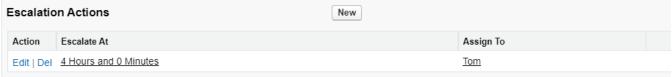


Rule Entry Edit

## MagicBrick Escalation

Edit this rule entries' details or add a new action to take when this entries' details and criteria is met.





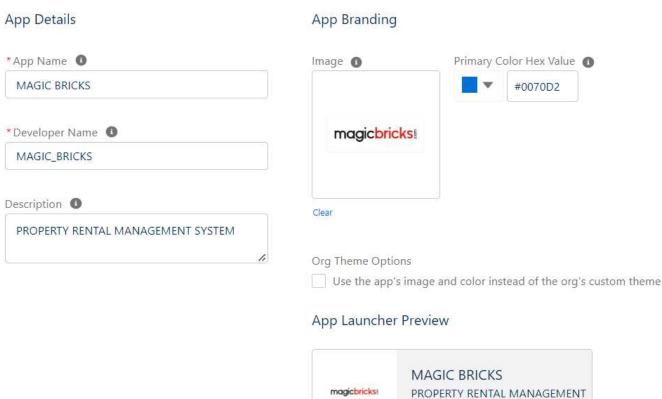
## Story 27:

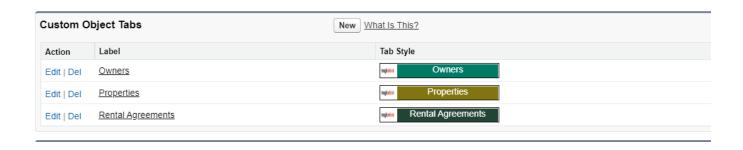
For branding purpose,

Client wants MAGIC BRICKS logo to be used in Salesforce App. So, the app we created for it we need to use the company's Logo.

Also, for all objects related to this project as icon of MAGIC BRICKS logo is to be used.

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

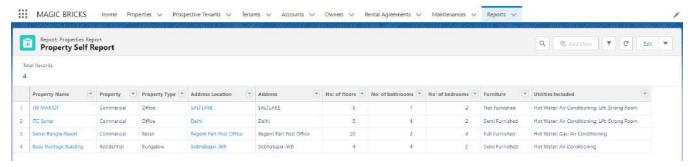




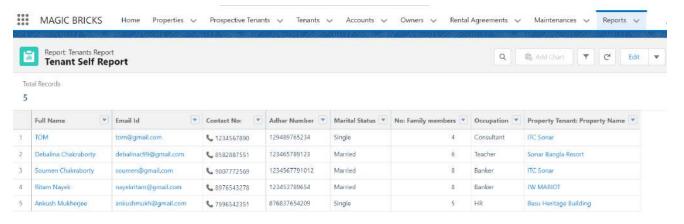
SYSTEM

## Story 29:

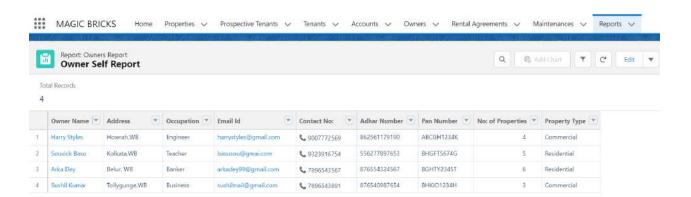
#### **Property**



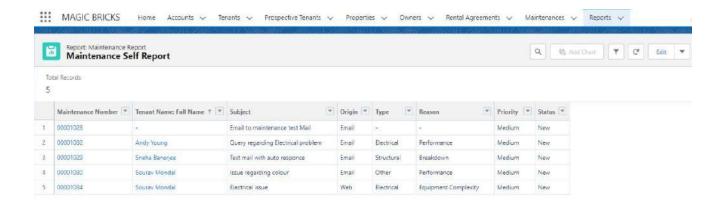
#### **Tenants**



#### **Owners**

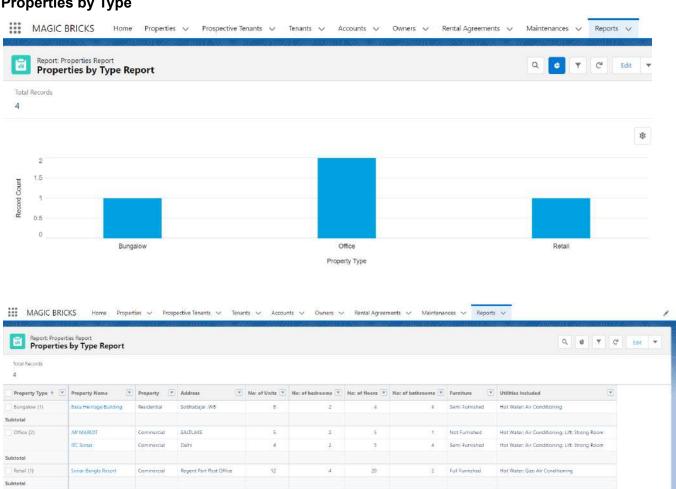


#### Cases

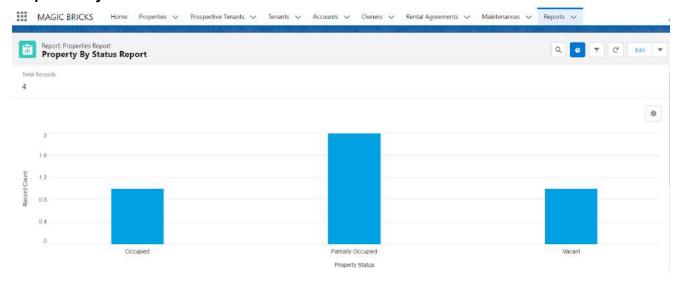


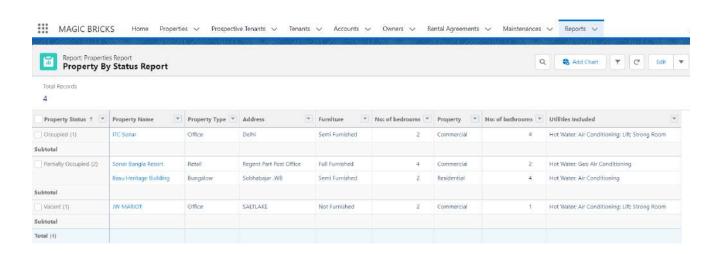
#### **Properties by Type**

Total (4)

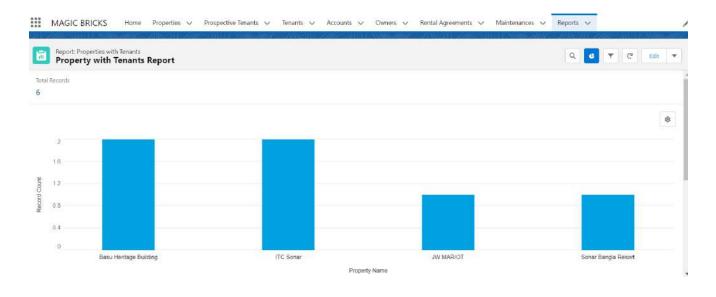


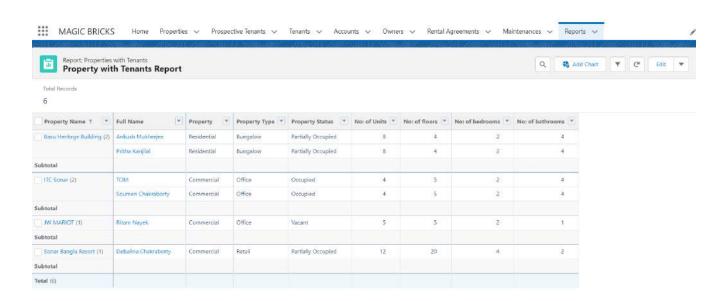
## **Properties by Status**





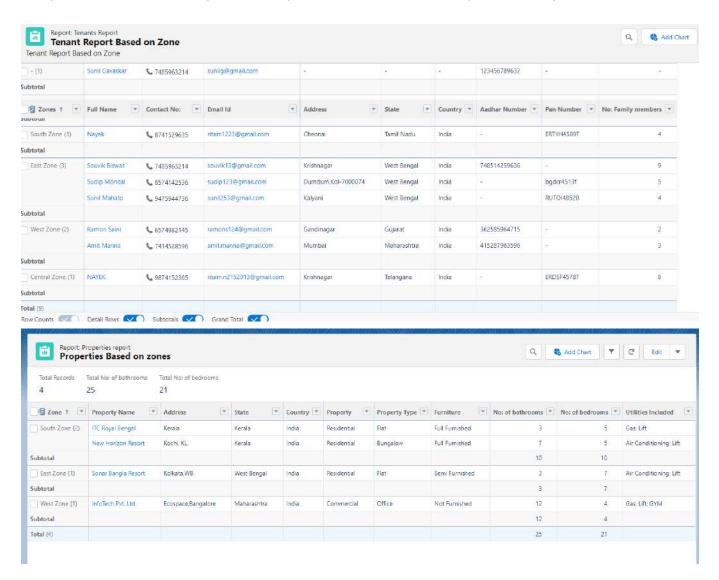
#### **Properties with Tenants**





## Story 30:

Client wants the records to be categorized as Zones with the values like North Zone, South Zone, East Zone, West Zone and Central Zone for picklist field State\_\_c in both Property and Tenant Object and also categorize the family of Tenants based on the number of family members like Nuclear Family (<= 3 family members), Micro family (<= 6 family members) and Joint Family (<= 10 family members).





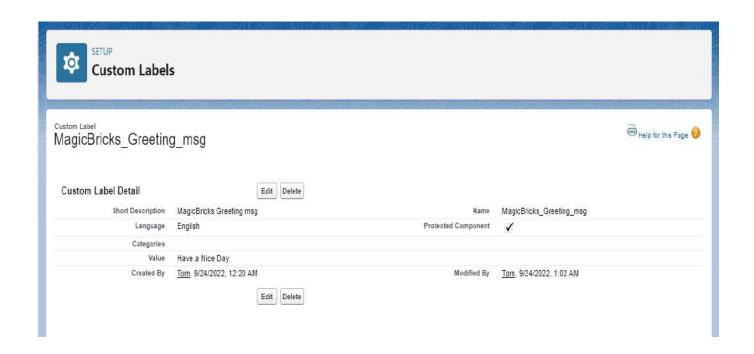
Total Records

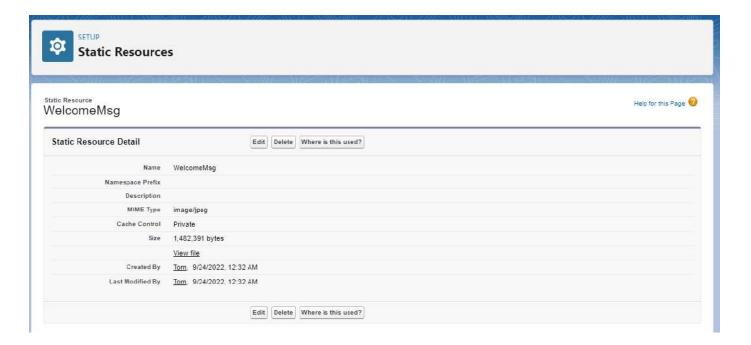
9

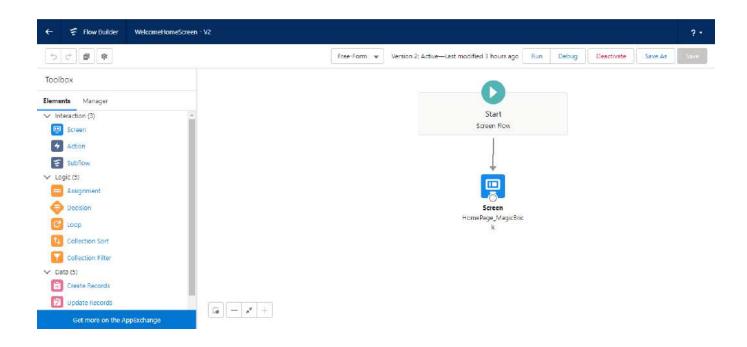
No: Family members 1	Full Name	Contact No:	Email Id	Aadhar Number	Pan Number 🔻	Address	State	Country 👻	Tamily Type
- (1)	Sunil Gavaskar	<b>\</b> 7485963214	sunig@gmail.com	123456789632	8	i.e.	8		Nuclear Family
Subtotal									
2 (1)	Ramon Saini	<b>6574982145</b>	ramons124@gmail.com	362585964715	55	Gandinagar	Gujarat	India	Nuclear Family
Subtotal									
3 (2)	Rumeli Das	<b>6</b> 512748596	rumel 452@gmail.com	:	RUMKL5469U	Noida	Delhi	India	Nuclear Family
	Amit Manna	<b>\</b> 7414528596	amit.manna@gmail.com	415287963596	8	Mumbai	Maharashtra	India	Nuclear Family
Subtotal									
4 (2)	Nayek	\$741529635	ritam1223@gmail.com	ie .	ERTYH4589T	Chennai	Tamil Nadu	India	Micro Family
	Sunii Mahato	<b>\$</b> 9475944736	sunii 253@gmail.com	æ	RUTO14852B	Kalyani	West Bengal	India	Micro Family
Subtotal									
5 (1)	Sudip Mondal	<b>\$</b> 8574142536	sudip123@gmail.com	æ	bgdcr4513f	Dumdum,Kol-7000074	West Bengal	India	Micro Family
Subtotal									
8 (1)	NAYEK	<b>Q</b> 9874152365	ritam.n2152013@gmail.com	12	ERDSF4578T	Krishnagar	Telangana	India	Joint
Subtotal									
9 (1)	Souvik Biswas	<b>4</b> 7485963214	souvik13@gmail.com	748514259636	p)	Krishnagar	West Bengal	India	Joint
Subtotal									
Total (9)									

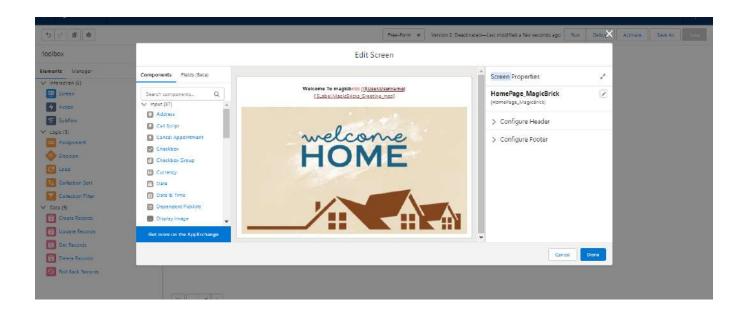
# Story 31:

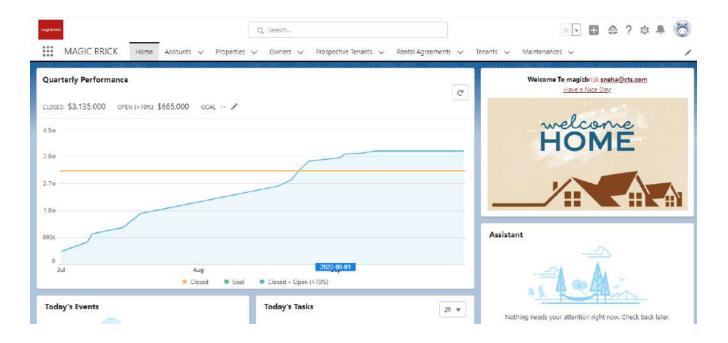
Client wants to display the welcome message to customer with an image and display the username and then show a greeting message and add it to the homepage of the application and make it as a Dynamic Message.





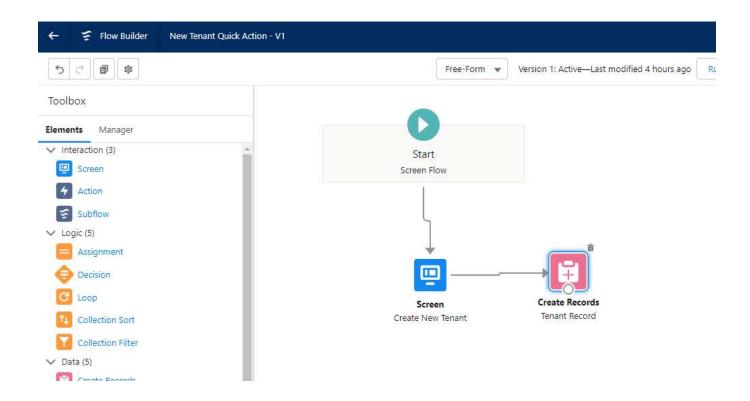


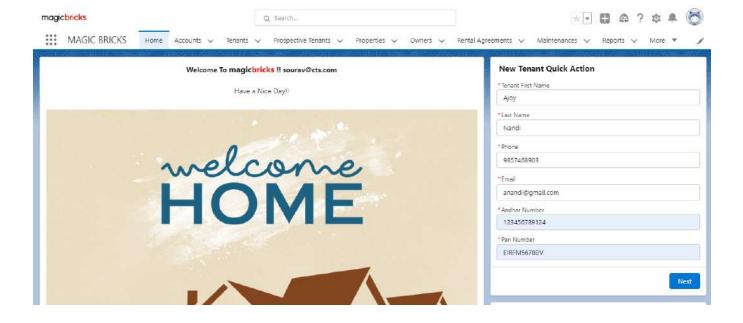


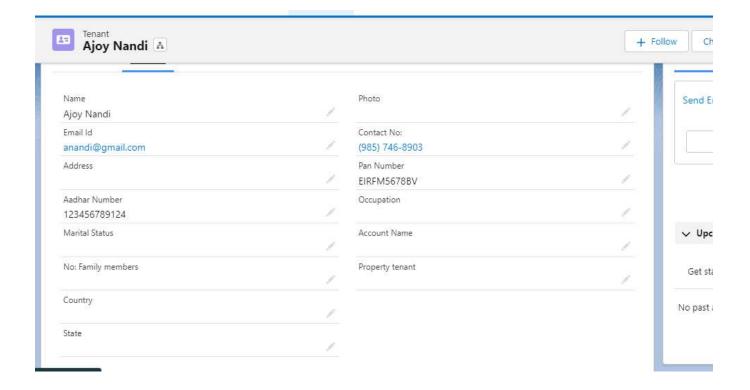


## Story 32:

Client wants to create a Quick Action for a New Tenant where the user needs to input all the required fields like First Name, Last Name, Title, Phone number, Email id and Address and then click on save button then the new Tenant record is created and add it to the Home Page of the application.

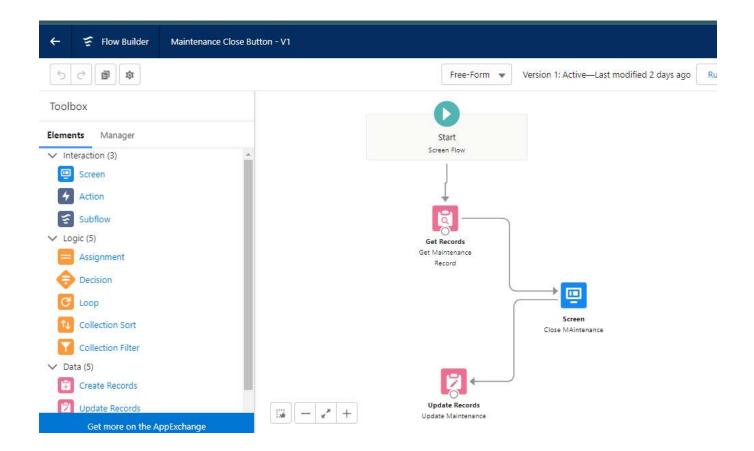


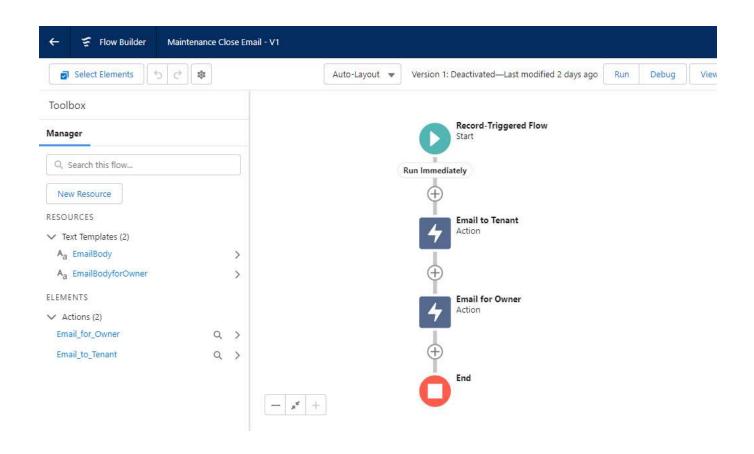


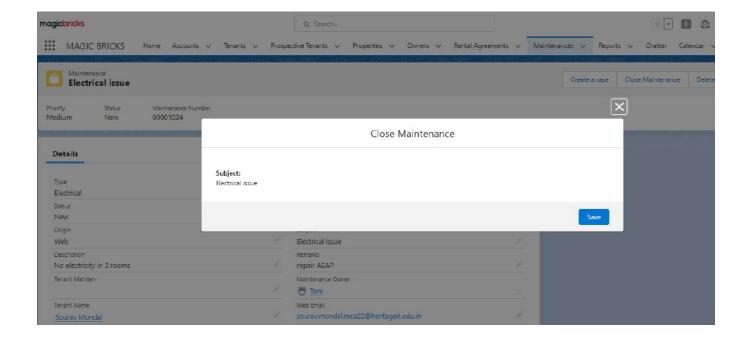


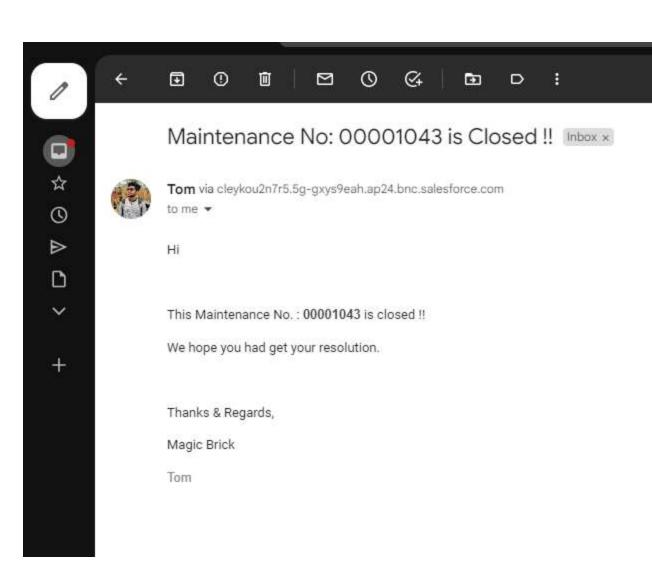
## Story 33:

Client wants to create a one click solution to update the Case status to closed and also send out confirmation email to the tenant and the owner using a Custom Button called as Close case and add it to the Maintenance object when clicked on it sends the Email to tenant and owner. Implement this using flows.



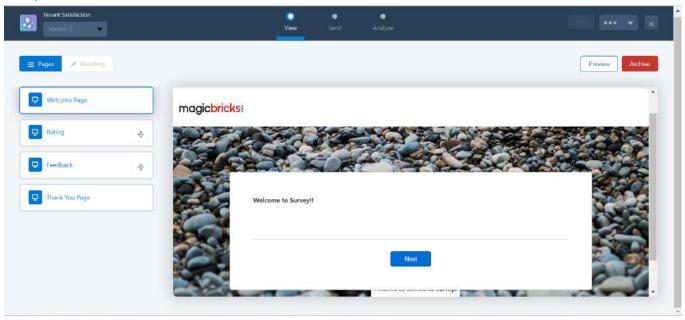


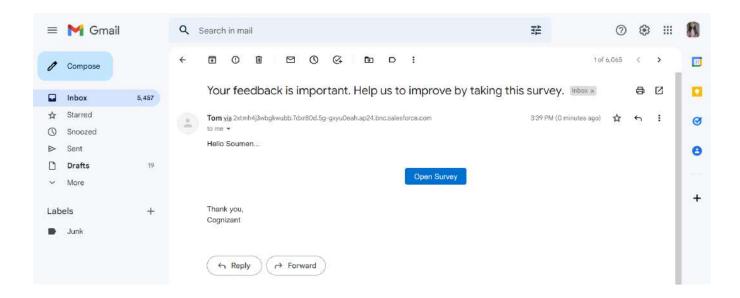




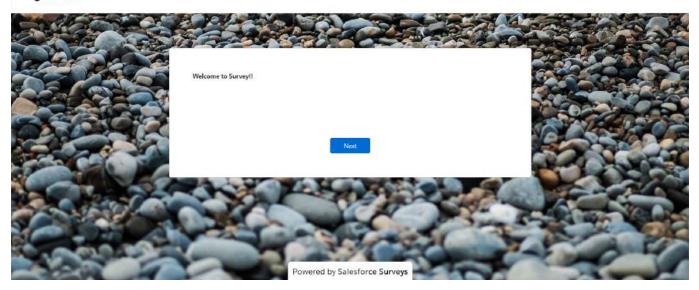
# Story 34:

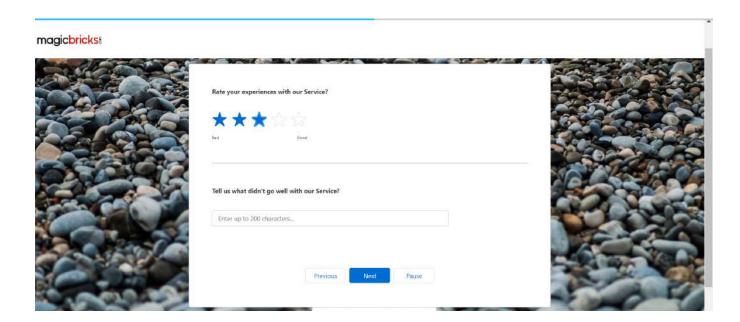
Client wants to conduct a survey to check for the tenant satisfaction and post a message to the Chatter Group for internal discussions



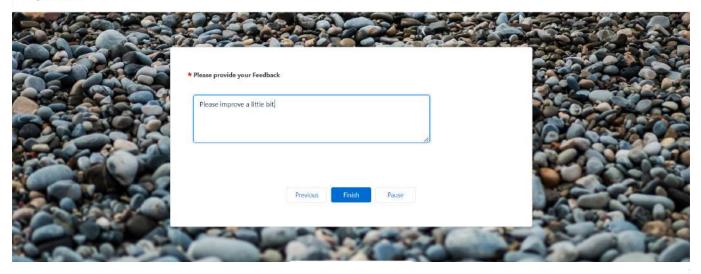


## magicbricks





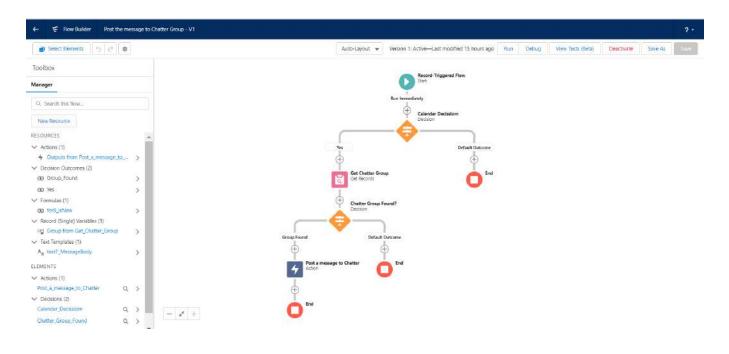
## magicbricks

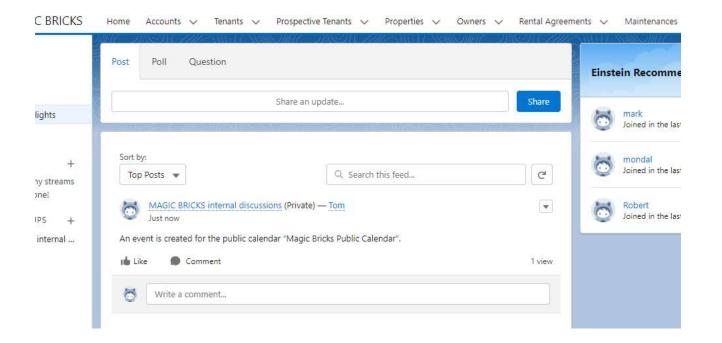


#### magicbricks



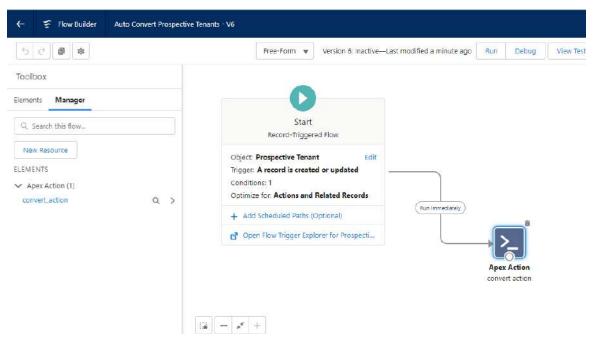
Whenever an event is created for the Public Calendars post a message to chatter group.

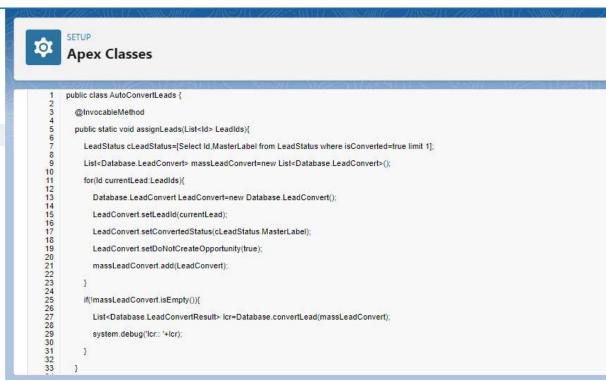


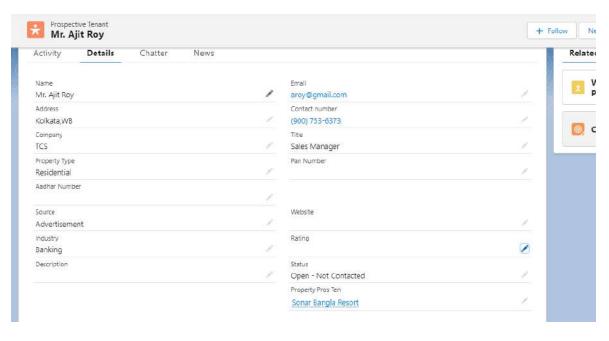


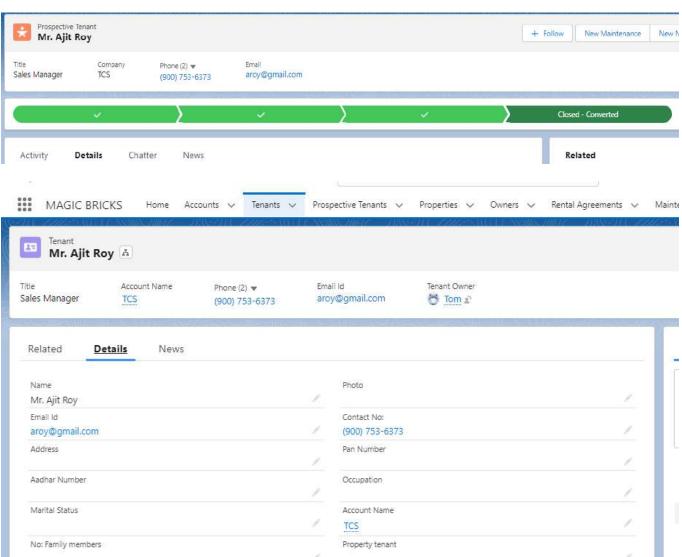
# Story 35:

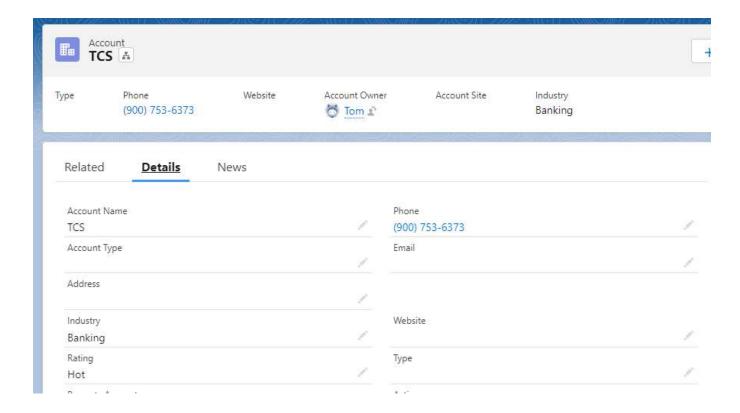
Client wants to automate the conversion of Prospective Tenants (Leads) to Accounts and Tenants. The lead conversion is a manual process but automate it to auto convert the leads as the picklist field in the Lead object is changed to closed and converted.





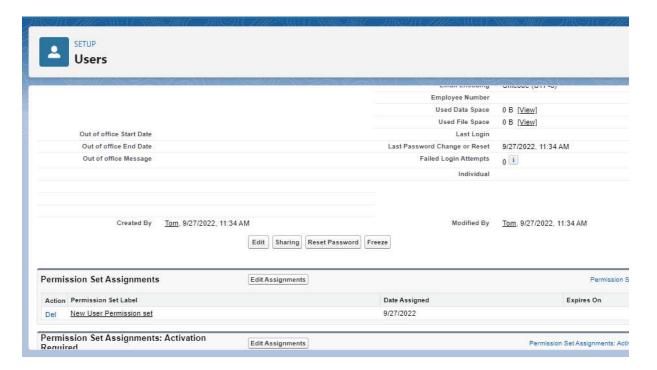


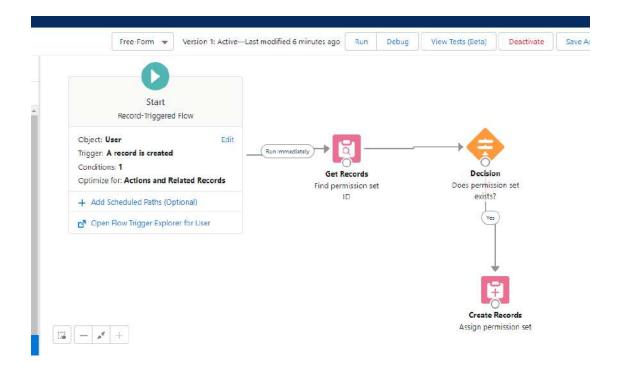




# Story 36:

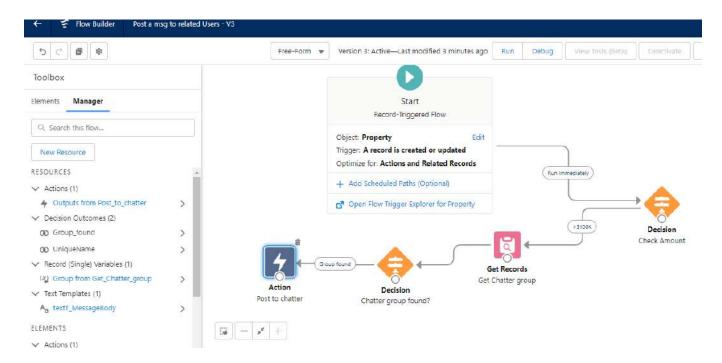
Client wants to automate to add the Permission sets to the user to extend the users functional access without changing their profile that is to grant modify all access to the Account object to a set of users without changing their profile or creating a new profile. Implement this using Record triggered flows.

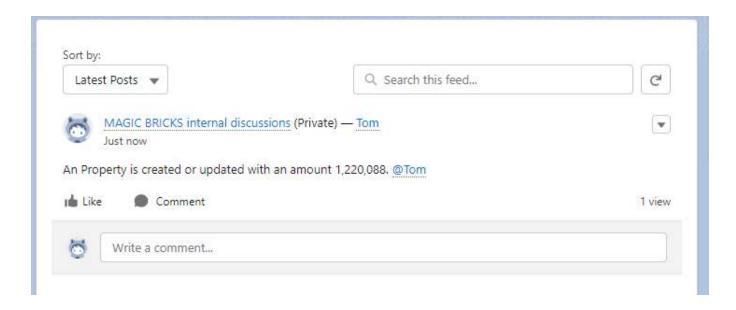




# Story 37:

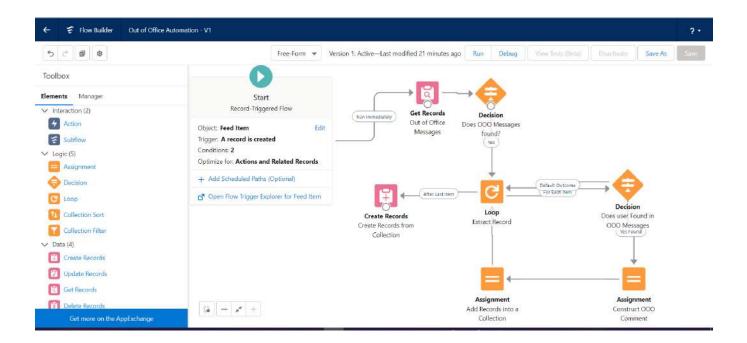
Client wants to automate to add a record which needs to be verified by other users like a property whose value is more and is being interested in booking by a tenant and whether he is able to afford it or not to the Chatter group which means we can now collaborate and discuss the records as a team in the Chatter group.

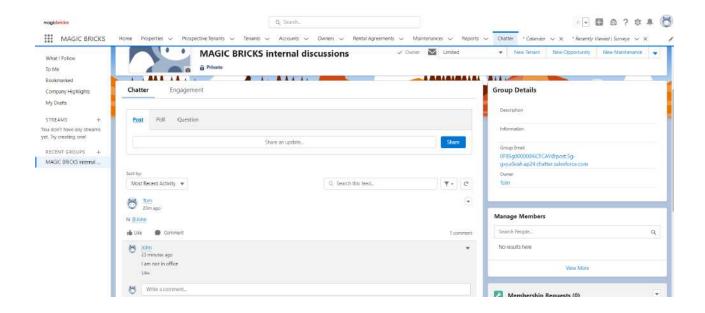




# Story 38:

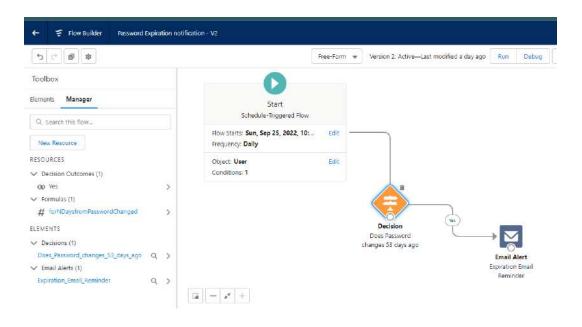
Client wants to create an automation to setup an out of office messages for Chatter posts where if a user is out of the office and every time someone mentions him on a Chatter post then auto post an automatic out of office comment. Implement this using Record triggered flows.

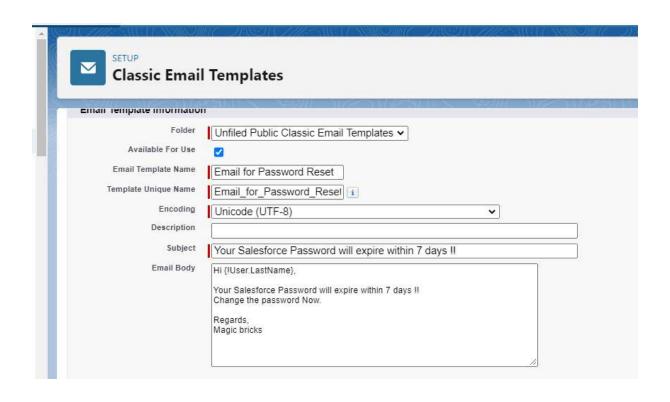


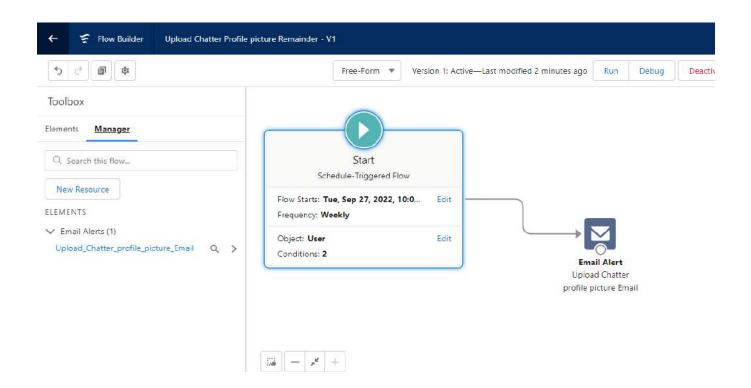


# Story 39:

Client wants to create an automation to send password expiration reminder to the users to change their passwords 7 days before they expire (Morning 10.00 am) as changing Salesforce passwords periodically is crucial as it prevents unauthorized persons from gaining access to the org.He also wants to remind by sending an email to users to upload Chatter profile photos.Implement this using Schedule triggered flows.







Edit Delete Clone

### **Email Template**

Send Test and Verify Merge Fields

Subject [Reminder] Upload Your Photo on Chatter

Plain Text Preview

Hi {!User.LastName}

Just a Reminder mail that you haven't uploaded your picture on Chatter

Thanks Magic Bricks

### Story 40:

Created By

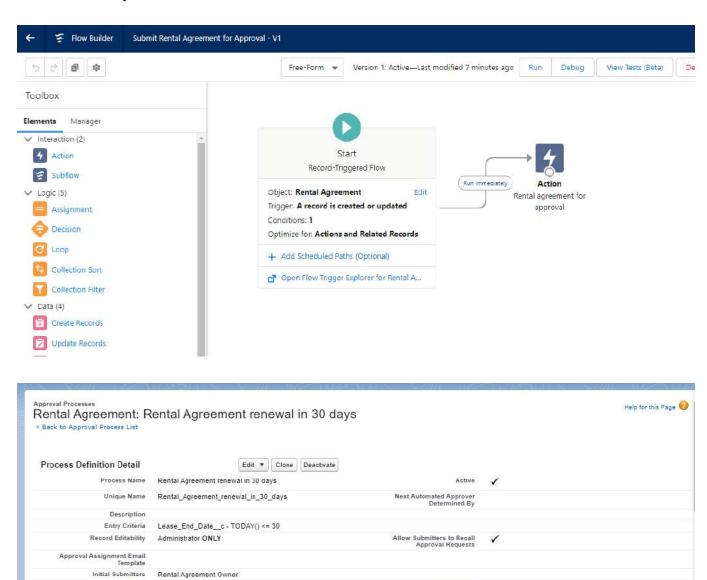
Initial Submission Actions

Action Type

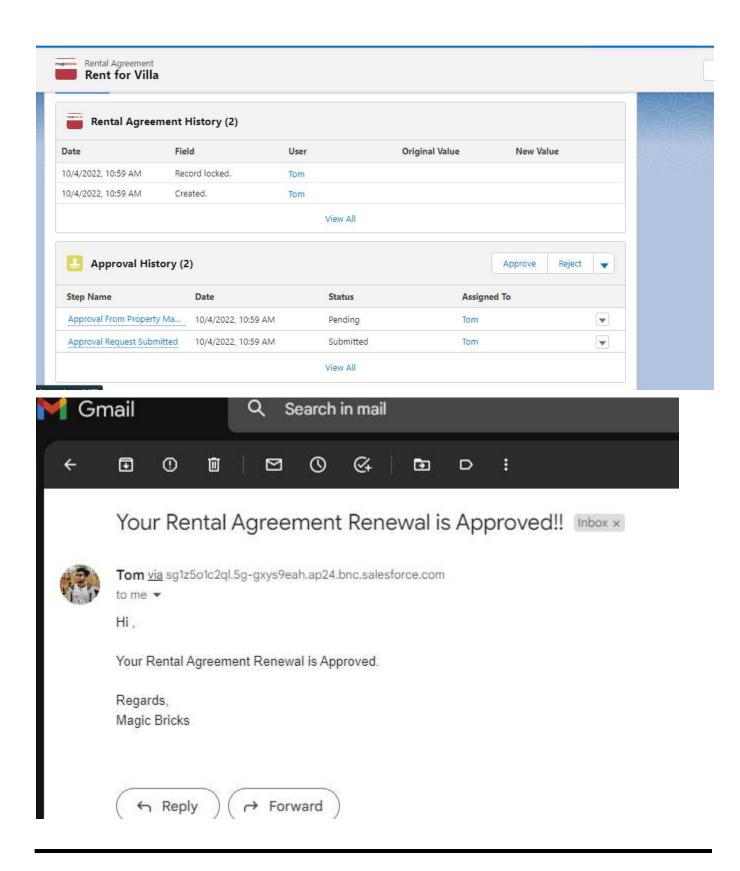
Tom, 10/4/2022, 6:11 AM

Description

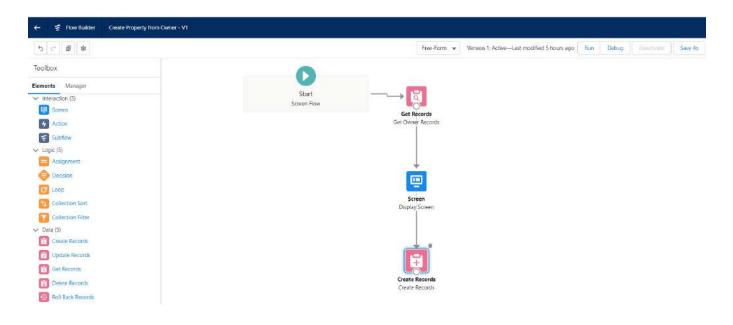
Client wants to create an automation which allows us to submit a record for approval to be automatically submitted into the approval process without any manual intervention when it meets the entry criteria and also generate tasks if the rental agreements of properties between the Tenant and Owner are up for renewal in 30 days for the Account Owner.

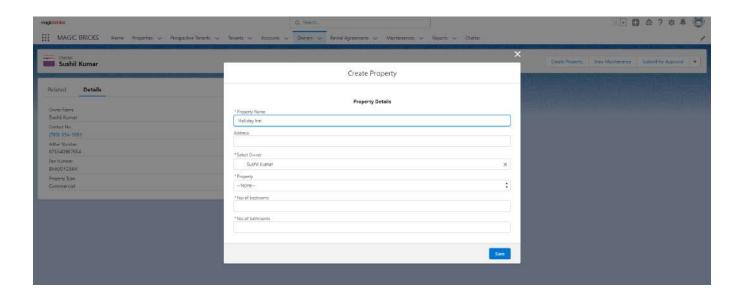


Modified By <u>Tom</u>, 10/4/2022, 10:44 AM

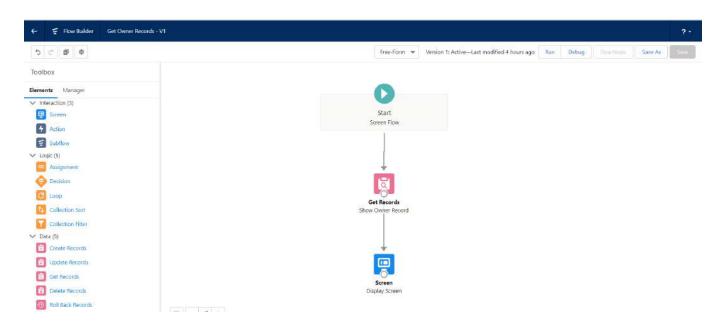


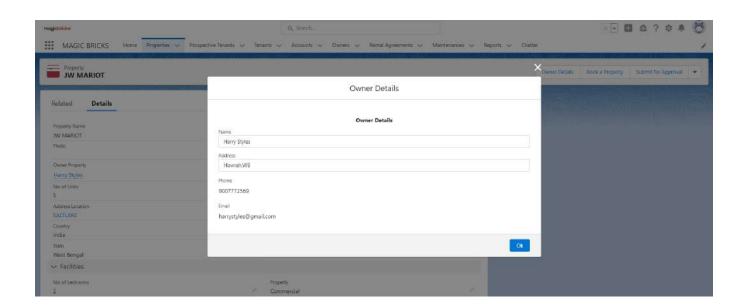
### **CREATE RECORD USING FLOW**





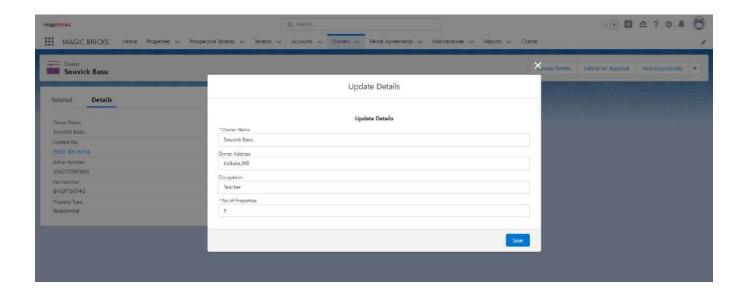
### **GET RECORDS USING FLOW**





### **UPDATE RECORD USING FLOW**





### **DELETE RECORD USING FLOW**

