PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

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1.PROJECT OVERVIEW

This project is focused on property management applications using salesforce, designed to address the primary challenge. The goal is to deliver a comprehensive solution by leveraging specific technology. Through this project, we aim to enhance the data accuracy and support the long-term goals of business.

2.OBJECTIVES

~ **Centralized Property Management** – Maintain a single source of truth for property, lease, tenant, and owner data.

~ **Improved Tenant Retention** – Use CRM tools to track tenant preferences, send personalized offers, and improve satisfaction.

~ **Reports And Dashboards** - To generate reports and dashboards for insights

3.SALESFORCE KEY FEATURES AND CONCEPTS UTILIZED

- *property management* : To store details about property and giving the discounts that Owner needed it.
- *permissions* : owner can access and see the property details in the app.
- *user & profile* : we can enter the user details to access the property details.

➢ Creating Developer account
➢ Objects
➢ Tabs
➢The Lightning App
➢ Fields
➢ Page Layout
➢ Profile
➢ User
➢ Permission Set
➢Set Up For OWD
➢User Adoption
➢ Reports And Dashboards

4.Detailed Steps to Solution Design

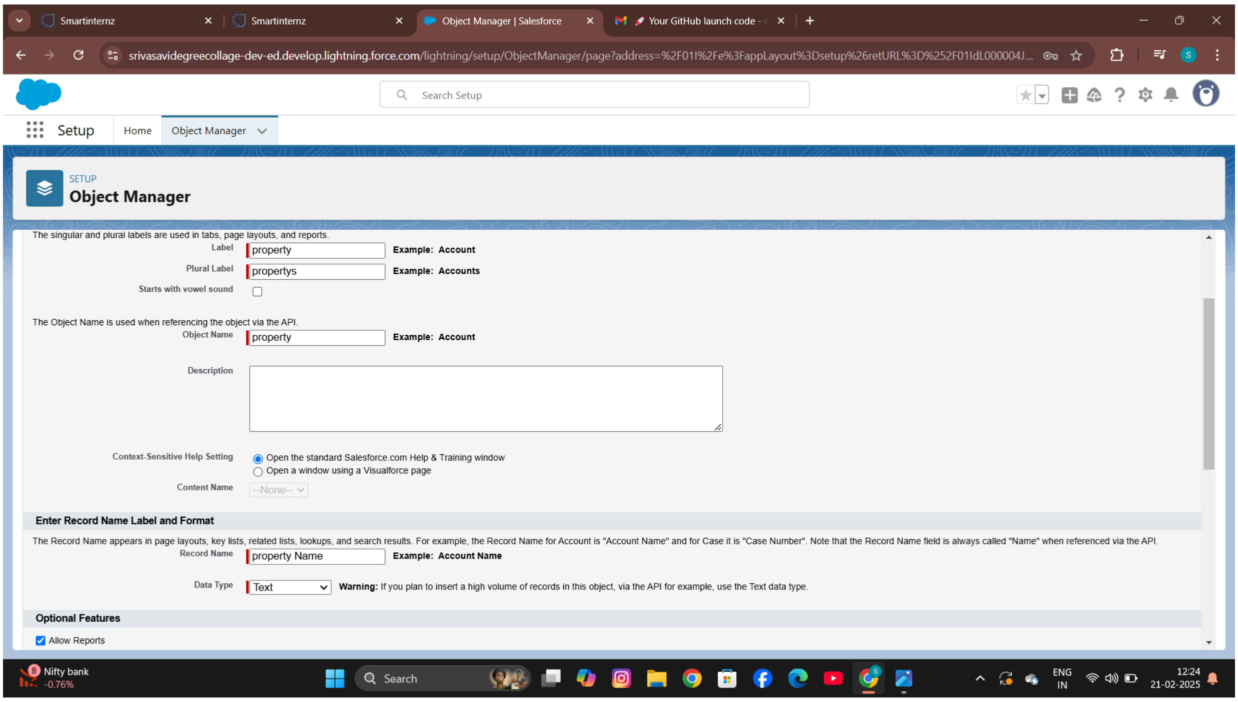
1.Introduction

➢ Creating a developer account
➢ Sign up for a salesforce developer edition to access to all platforms features
➢ Enter first name , second name, email, company, country, postal code, and User name.
➢ Verify Email
➢ Check your email and click on the verification link
➢ Login to Salesforce
➢ Go to salesforce login and log in with your credentials

2.Objects

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:
1.**Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2.**Custom Objects**: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.



Created a object manager

1.Property

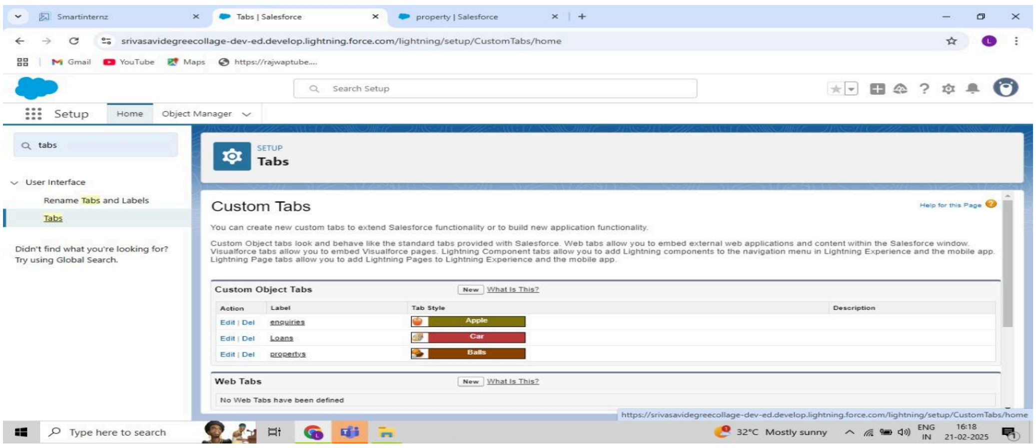
2.Enquiry

3.Loan

3.Tabs

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

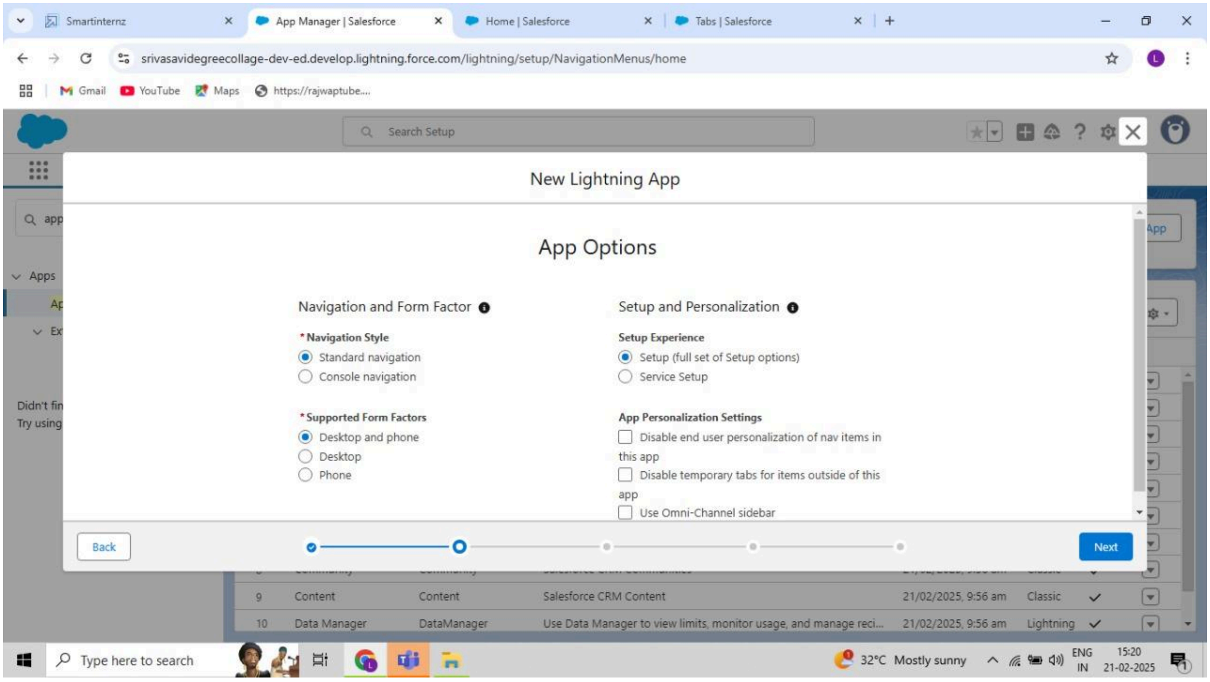
1. Creating a lightning tabs
2. Giving a default profile page

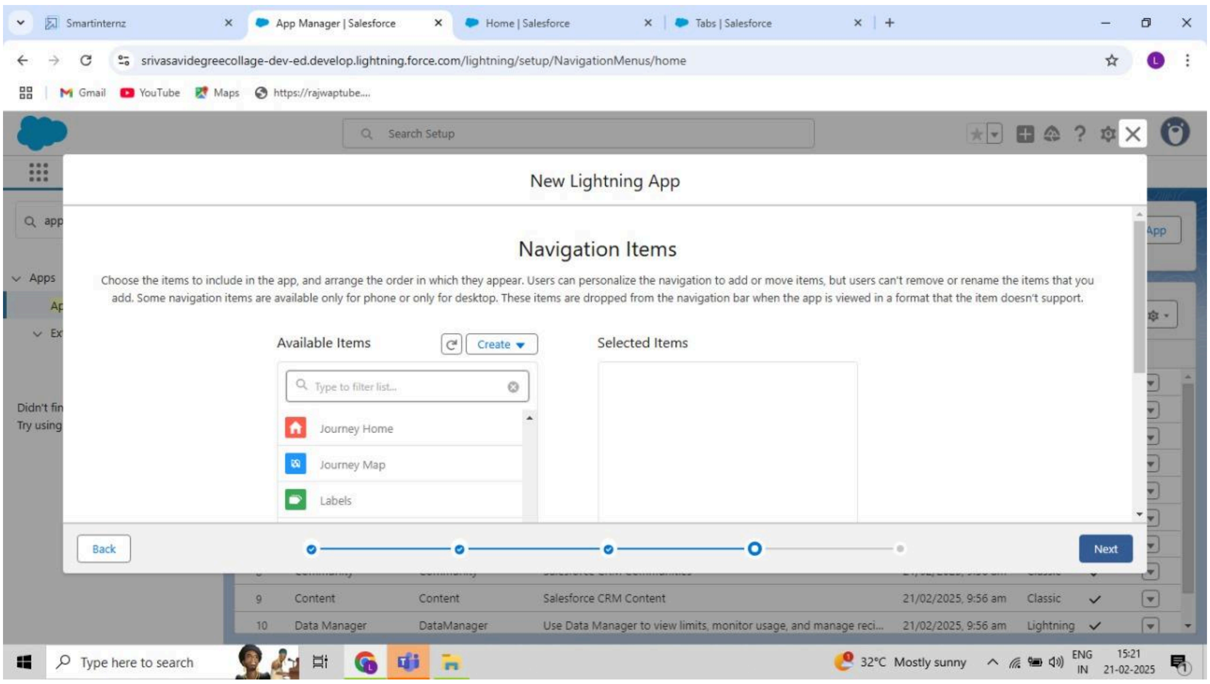


4.The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Creating a Lightning App





Created a lightning app

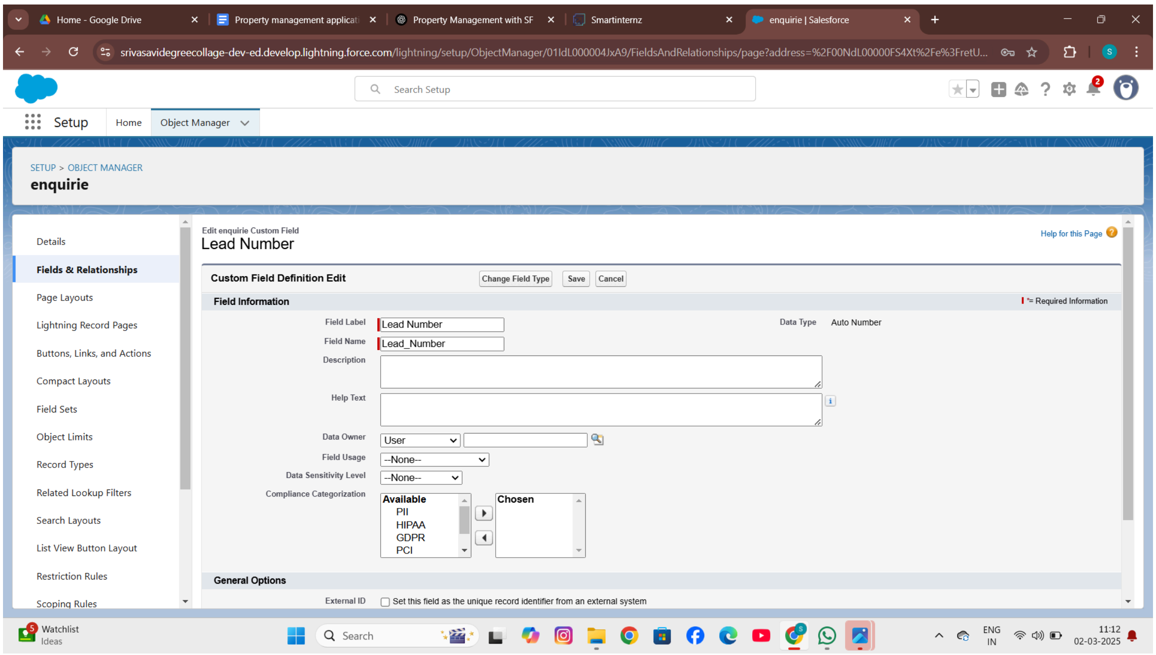
5.Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

There are two types of fields

1.standard fields

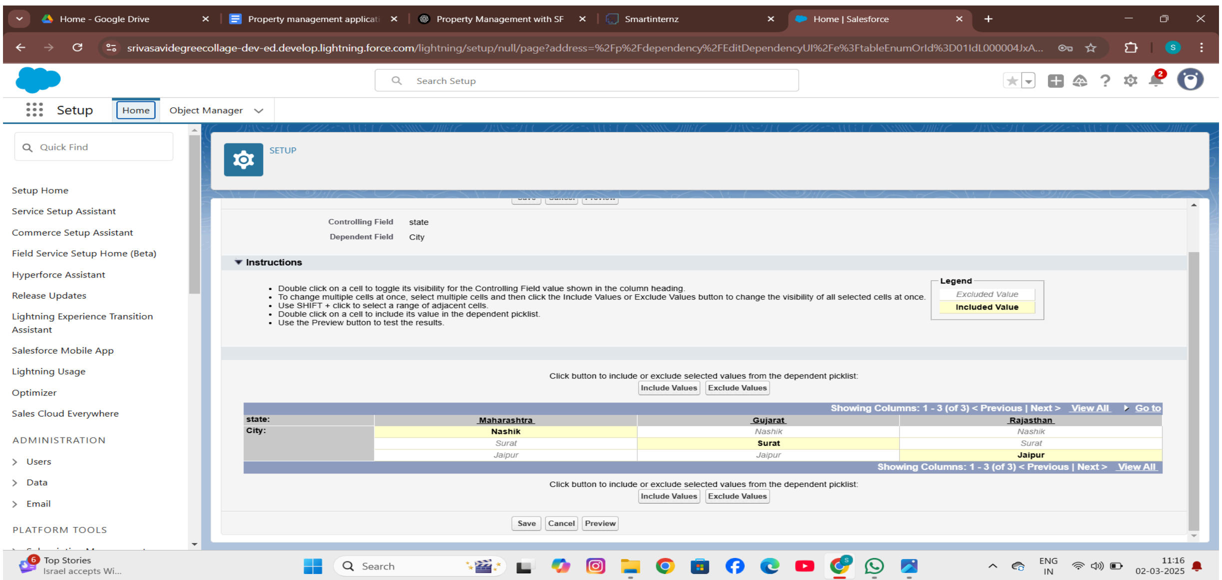
2.custom fields



Field name : lead number

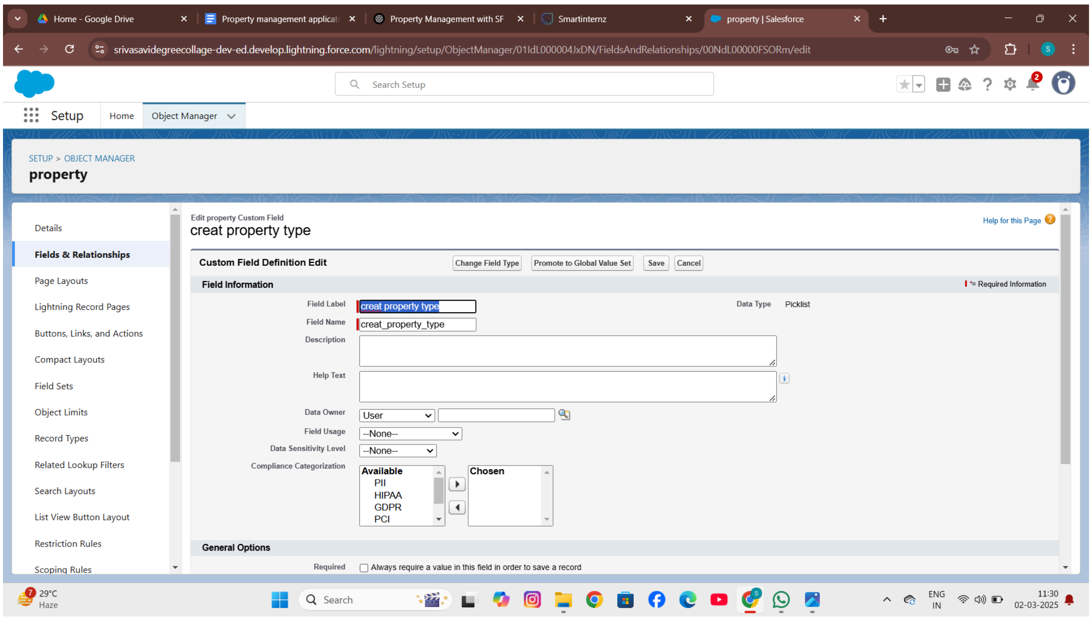
Data type : auto number

Creating a picklist field on enquiry object



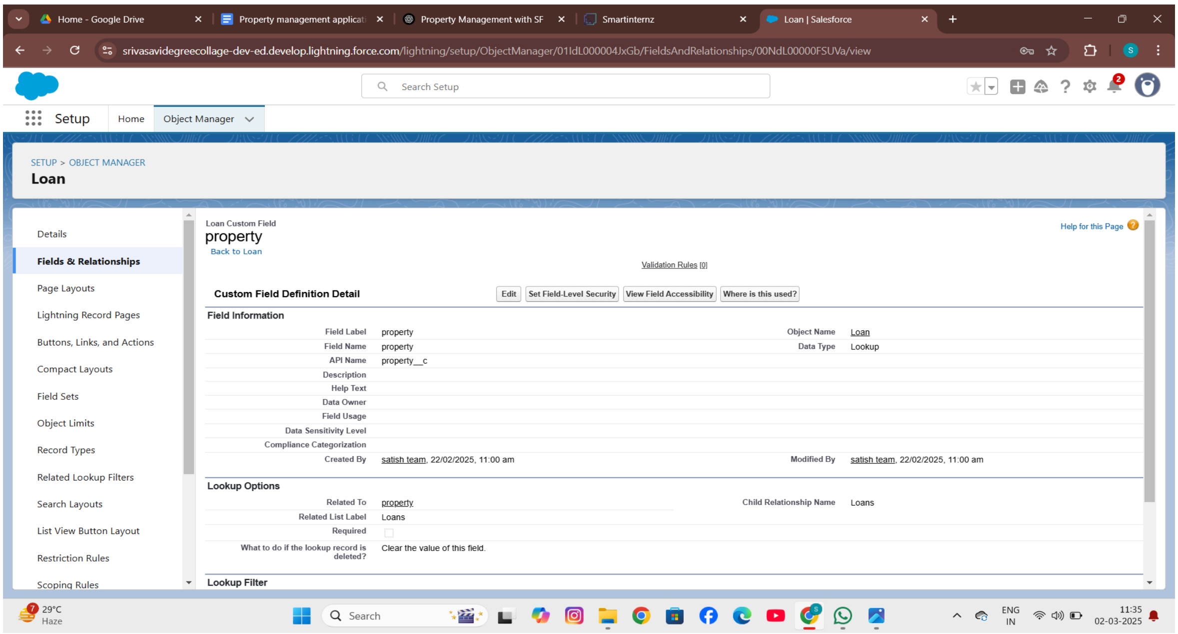
Create the remaining Fields:

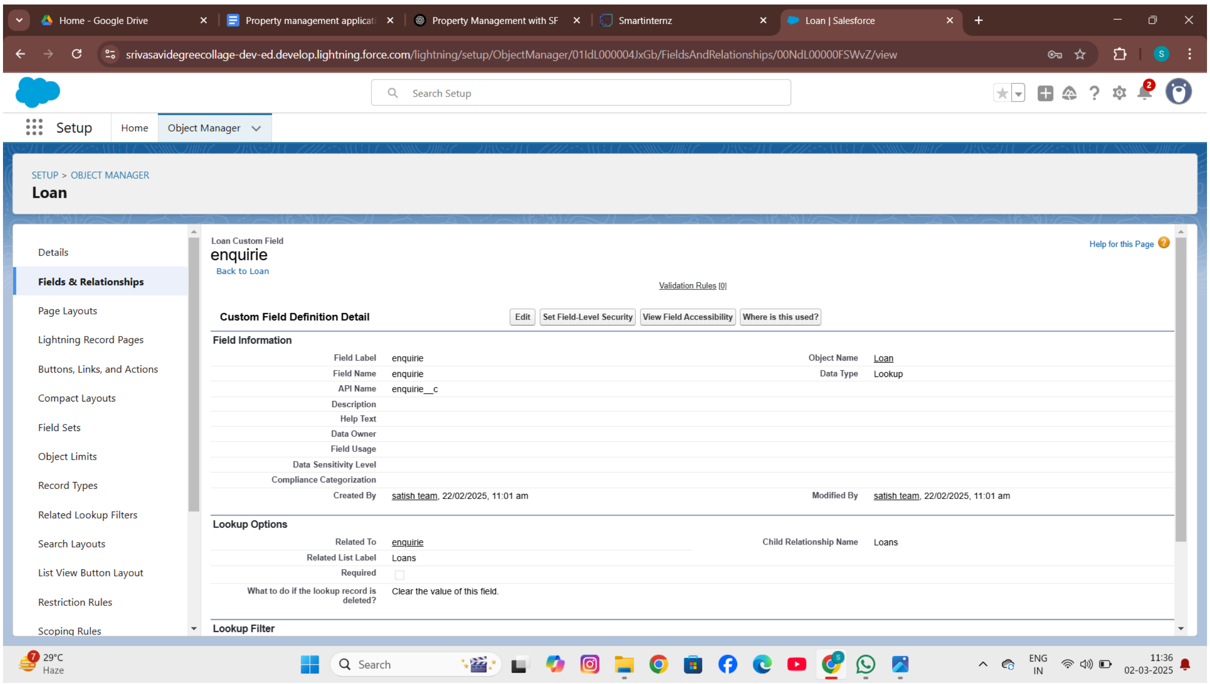
1.Customer name (lookup relationship related to Enquiry)
2.Create Property Type: (Picklist fields) (Residential, Commercial, Industrial) (Field Dependency)
3.Residential: Picklist fields (1BHK, 2BHK, 3BHK) (Field Dependency)
4.Commercial: Picklist fields (Shop, Office) (Field Dependency)
5.Industrial: Picklist fields (Factory, Mall) (Field Dependency)
6.State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
7.City:(Take Any City for Field Dependency)8.Discount:(Percentage As the Field Data Type)
9.Price: (Number As the Field Data Type)
10.Loan Amount: (Currency As the Field Data Type)
Using this formula: Lead_Id r.Customer_Name c



For Loan Object

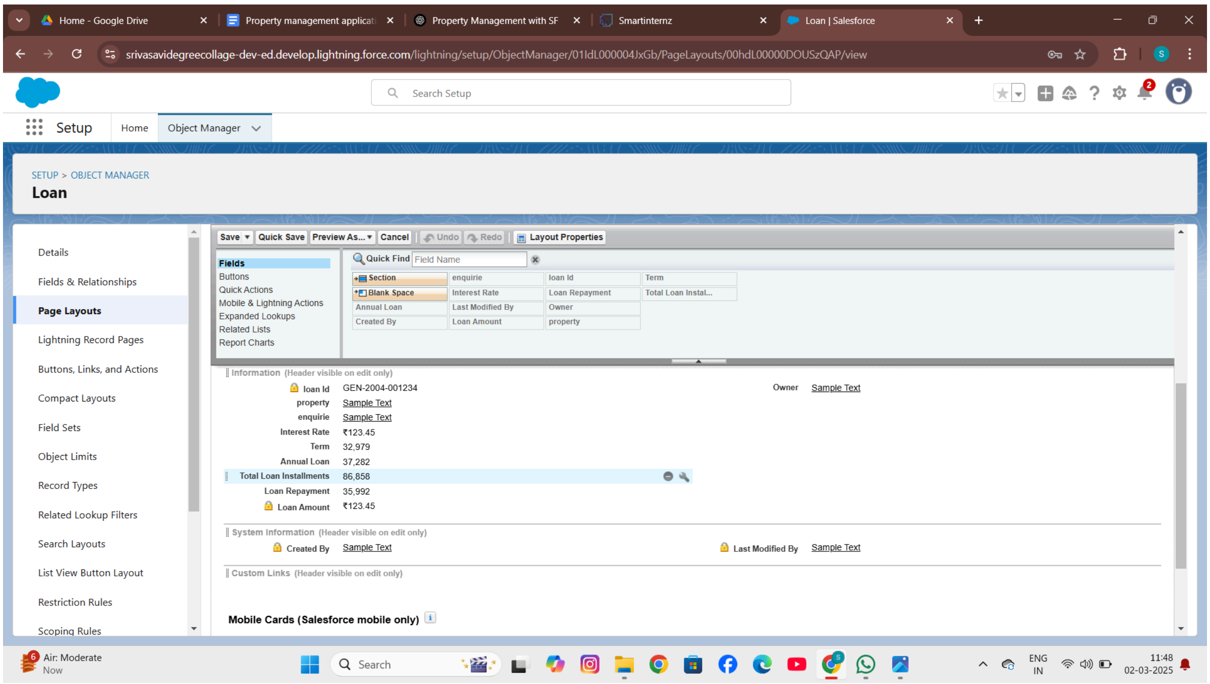
1. Property name: (lookup relationship related to property)
2. Customer name: (lookup relationship related to Enquiry)
3. Interest Rate: (Select the Field Data Type As Currency)
4. Term: (Select the Field Data type as Number)
5. Annual Loan: Field create the Number as the field data type
6. Total Loan Installments: (Field create the Number as the field data type)
7. Loan Repayment: (Field create the Number as the field data type)
8. Loan Amount: (Select the Field data type as Formula)
Using this formula : (Loan_Repayment__c* (((1+(Interest_Rate__c/52))^ Term__c) -1))/((
Interest_Rate__c/52)*((1+(Interest_Rate__c/52))^ Term__c))





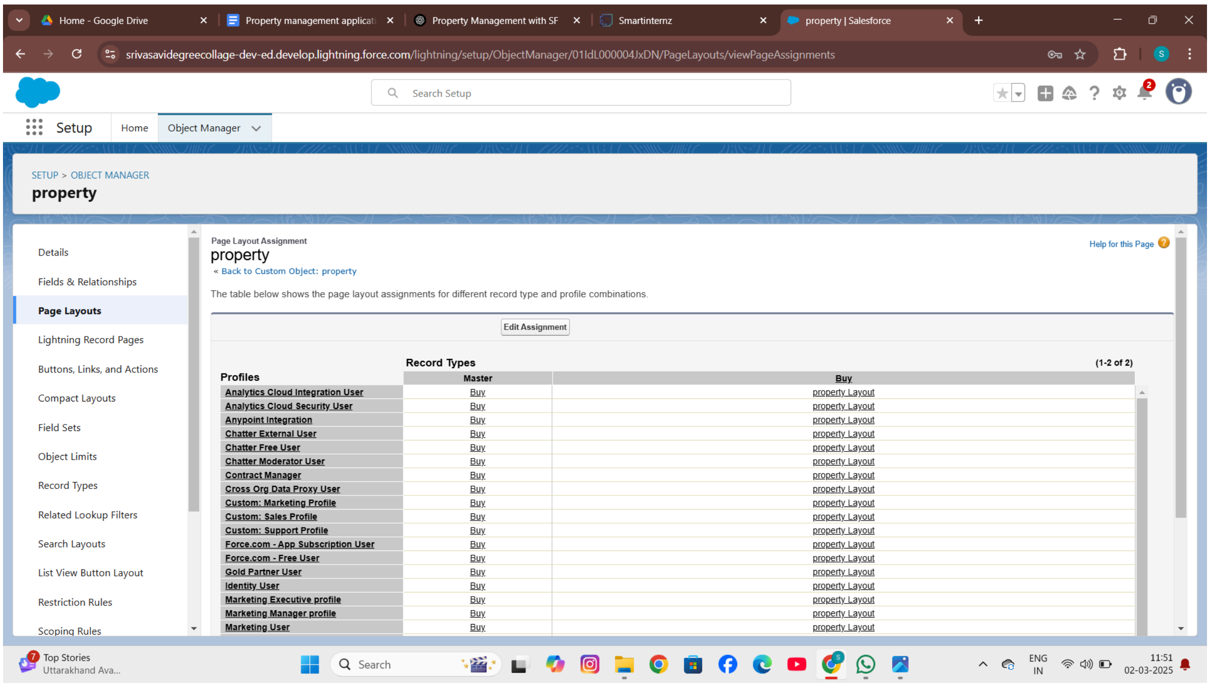
6.Page Layout And Record type

➪Created a page layout for property object
➪ Go to setup
➪click on Object Manager
➪type object name in search bar
➪click on the object
➪Now click on “Page Layout” and click on new
(We can add or remove the the page layout field with the help of drag and drop)



Creating a page layout assignment

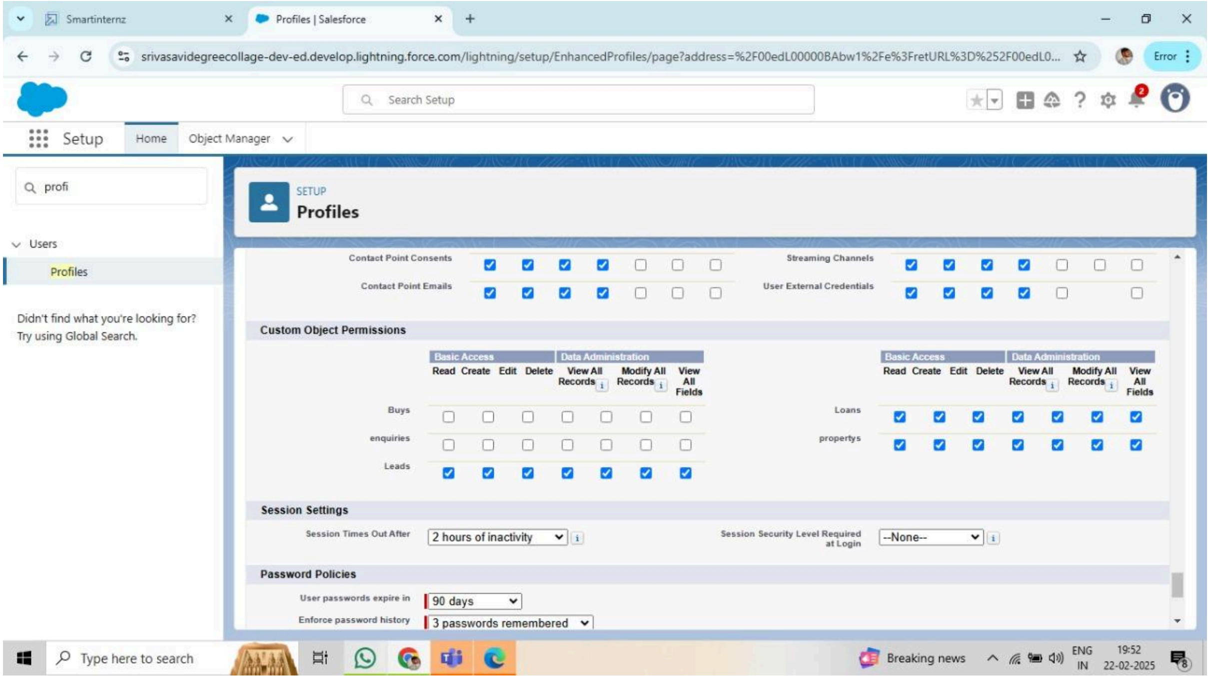
➪Go to setup
➪click on Object Manager
➪type object name in search bar
➪click on the object
➪Now click on “page layout ” ? click page layout assignment
➪Select the buy record type and select page layout to use(buy) then click on save.



7.Profile

➪Create a new Profile

➢Go to setup
➢type profiles in quick find box
➢clone the desired profile (standard user is preferable).
➢profile name: Sales Manager
➢giving permissions as they required



Creating remaining profiles

(a). Marketing Executive profile (b). Marketing Manager profile

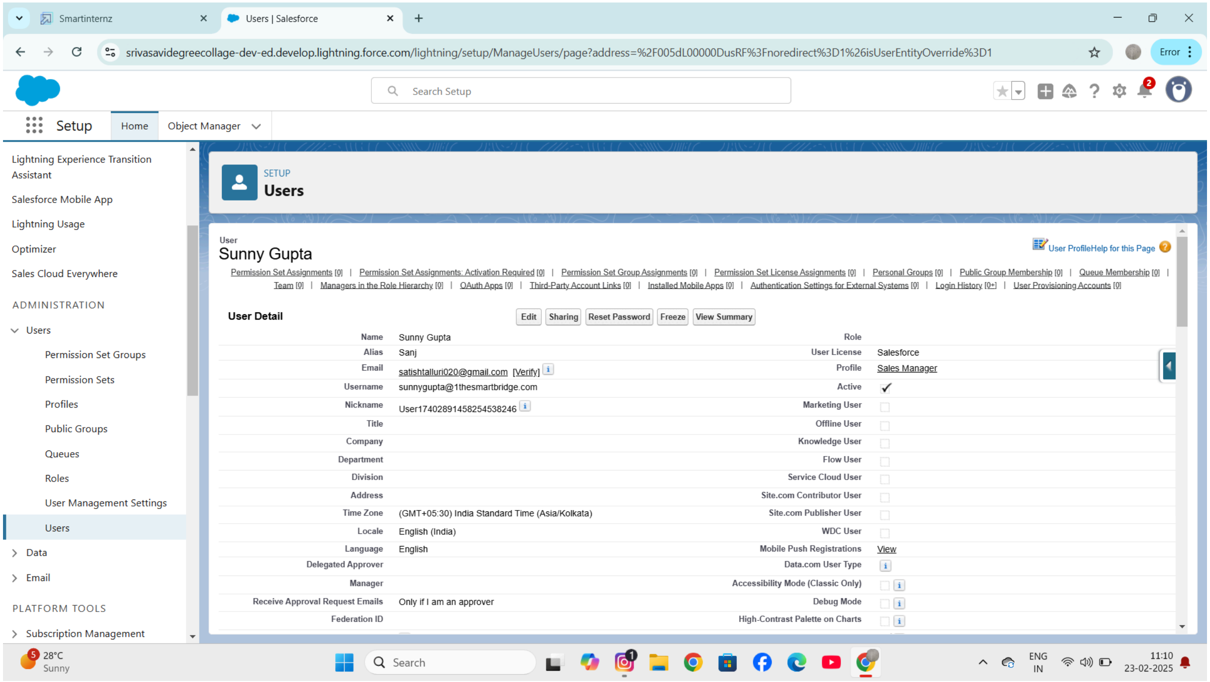
➪Create marketing Executive Profile

In The Profile Level Give Read and Create Access for Lead, property, loan objects to Marketing Executive profile and Read, Create, Edit, Delete for the Marketing manager profile for Lead, property, loan objects

8.User

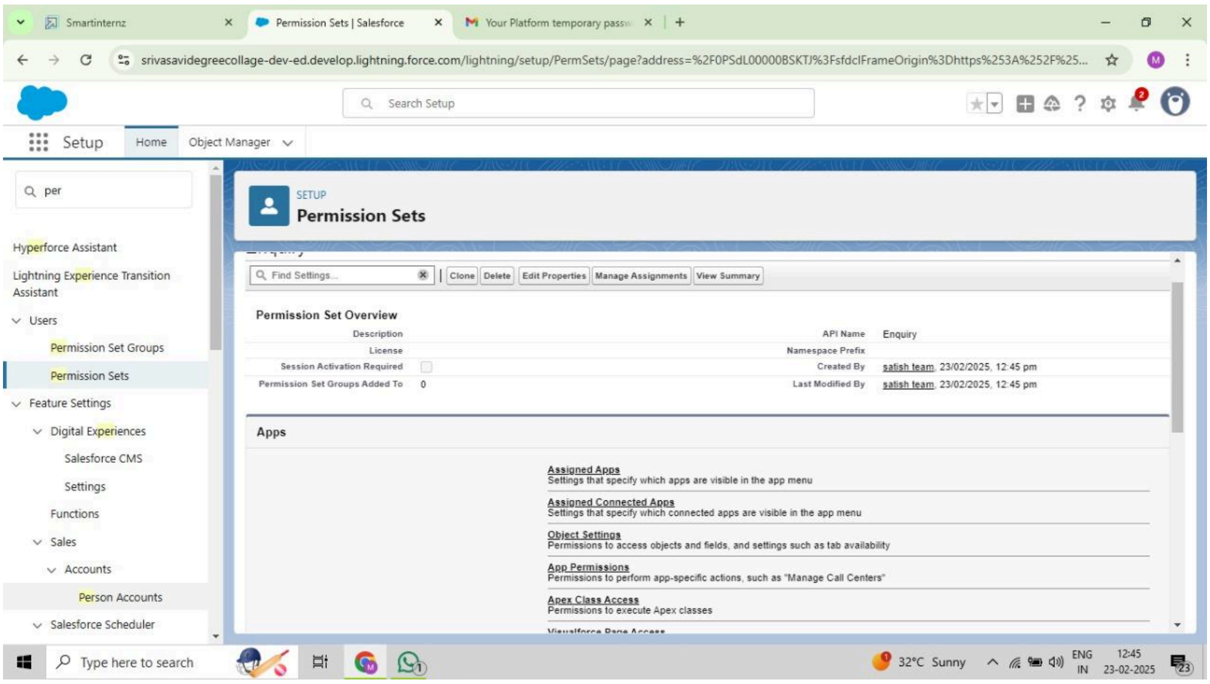
Creating a user
First Name: Sunny
Last Name: Gupta

Alias: Sanj
Email: provide your personal email id for future reference
Username: sunnygupta@thesmartbridge.com

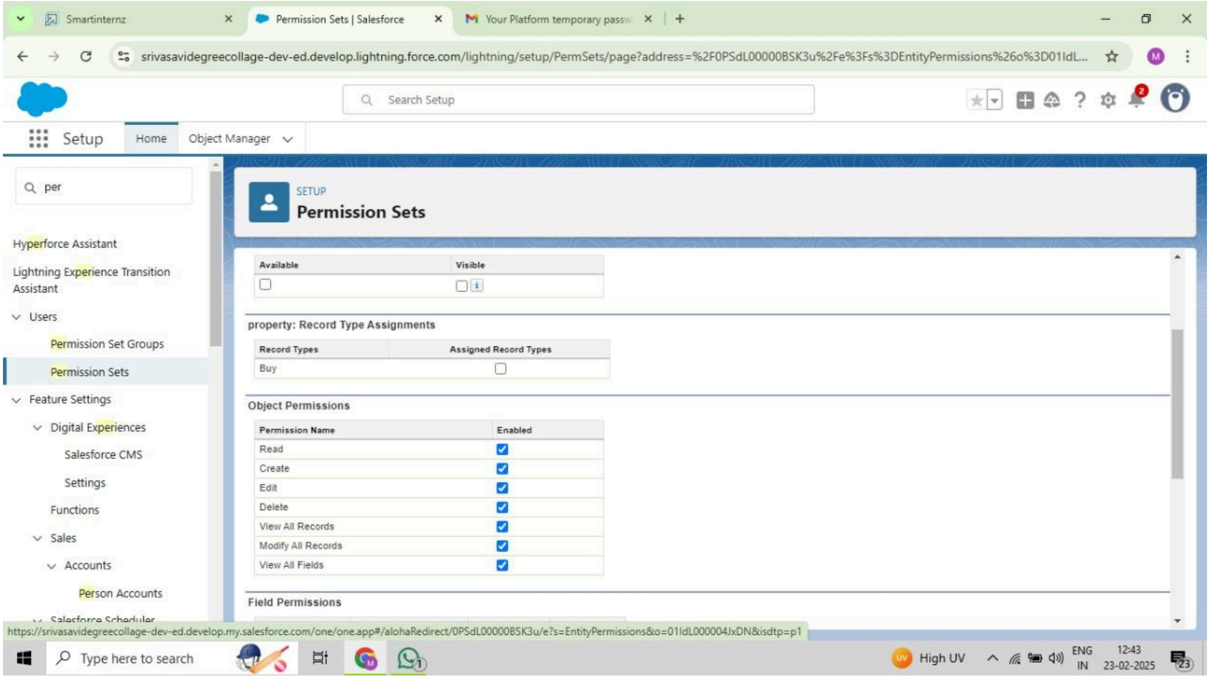


9.Permission Set

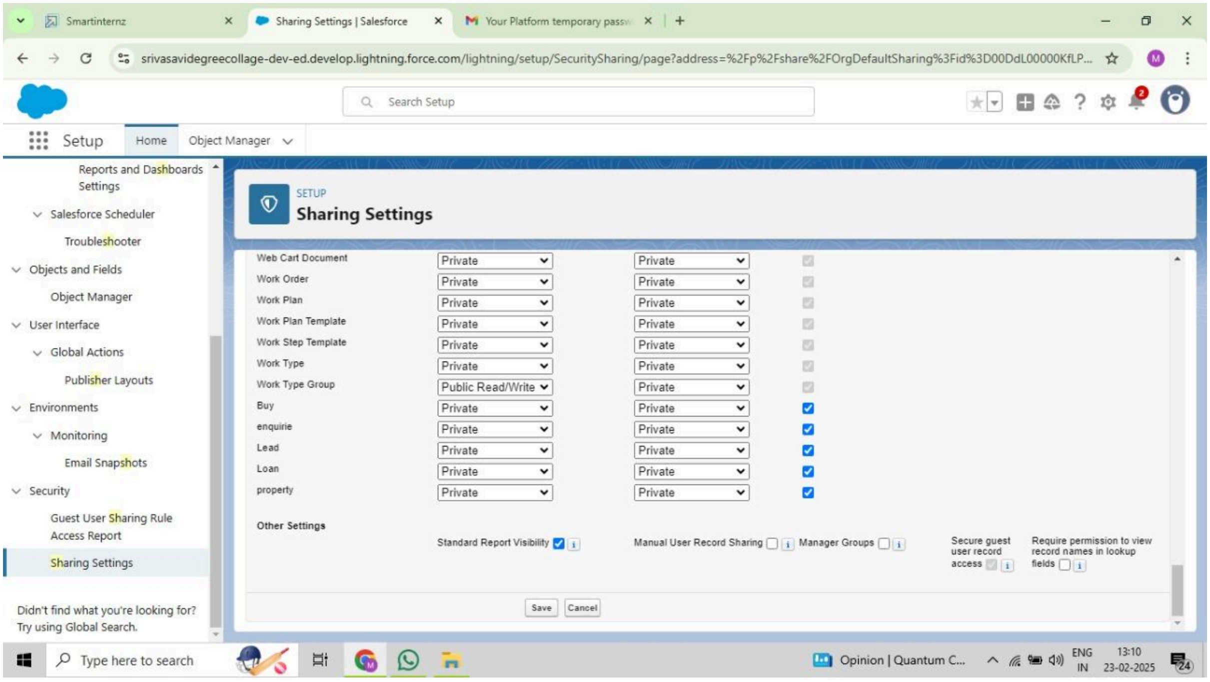
Creating a permission set
Label name : Sales Rep Advance

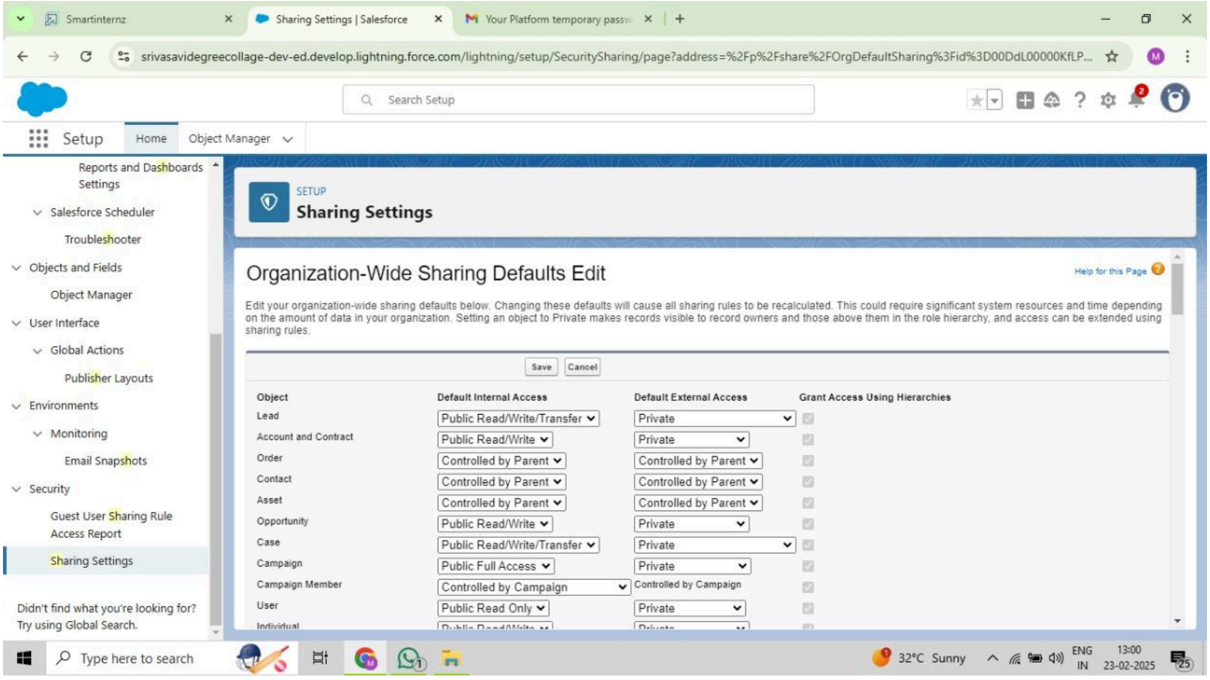


⇨In Object Permission we give View all permission

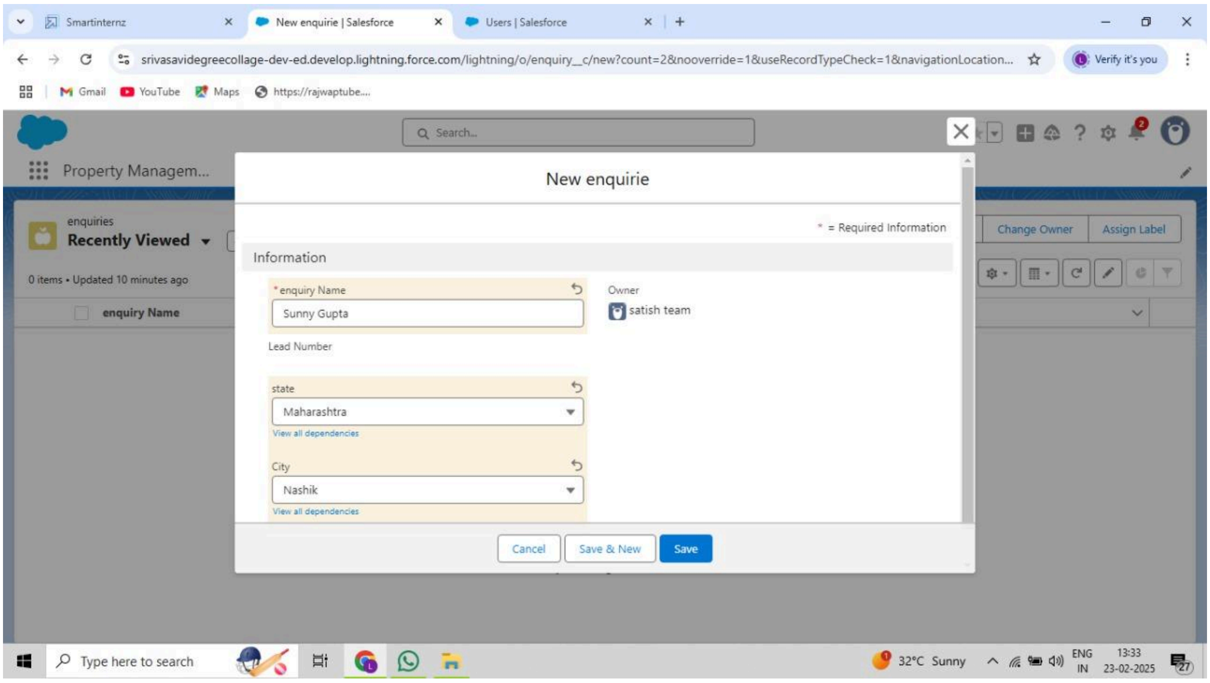


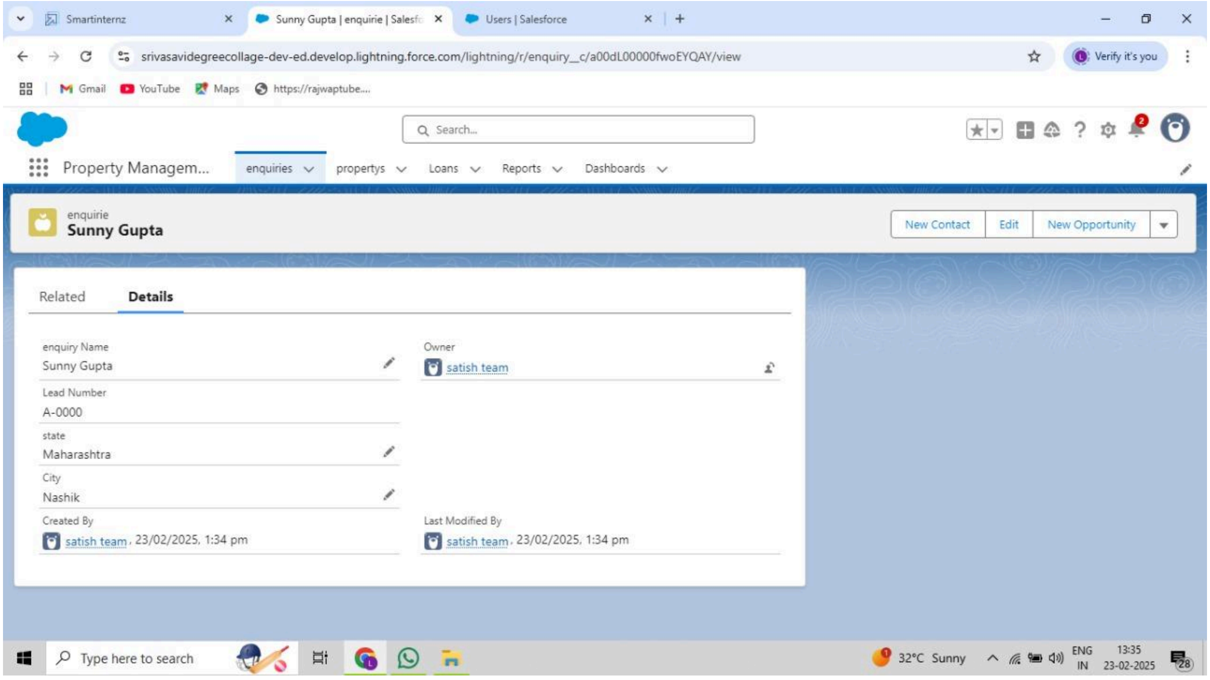
10.Set Up For OWD





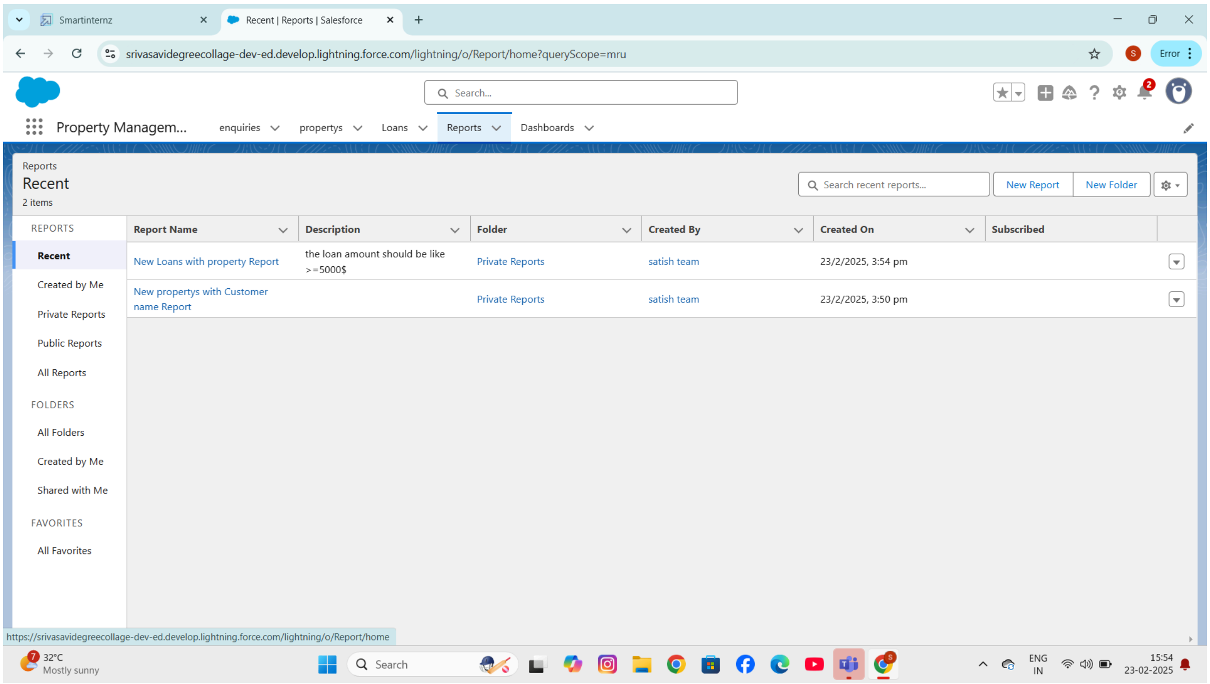
11.User Adoption



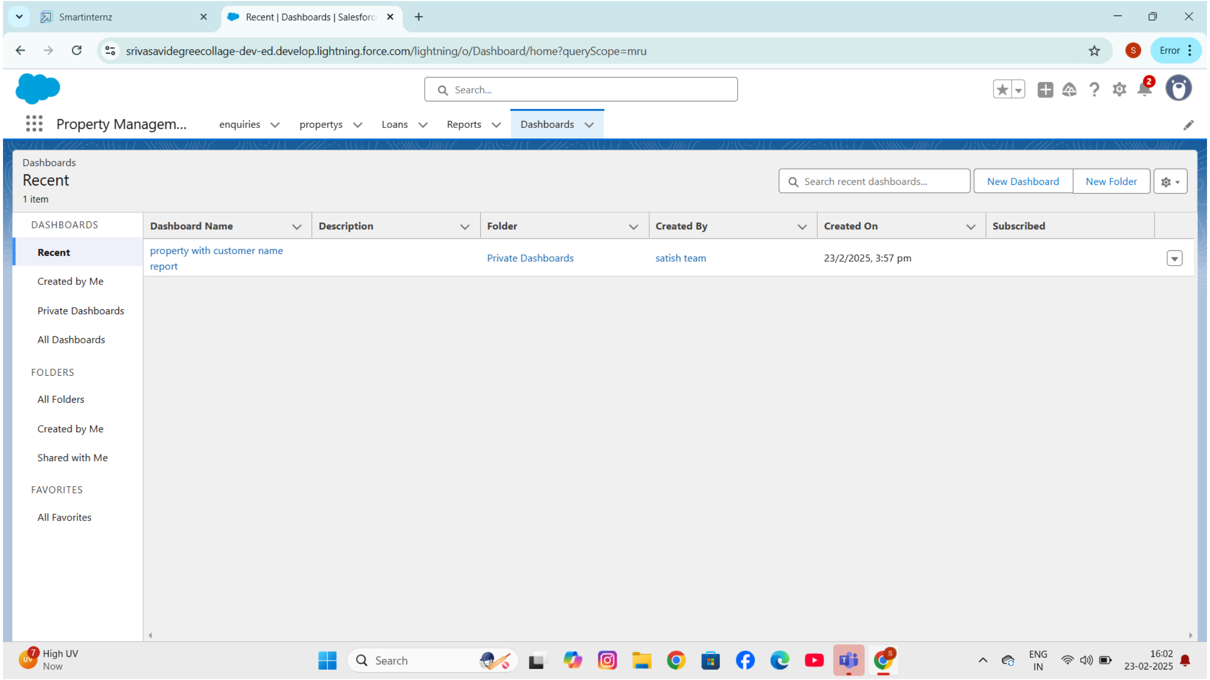


12.Reports And DashBoards

Creating a report using name (Properties with Customer Name Report)



Creating a dashboard



5.Testing and Validation:

The property management is tested with the help of reports and dashboards
It is validated in the dashboards.

6.Key scenarios addressed by salesforce in the Implementation project :

1. Lead & Opportunity Management

- Capturing, tracking, and nurturing leads efficiently.
- Automating lead assignment and follow-ups.
- Managing sales pipelines and forecasting revenue.

2. Sales Process Automation

- Standardizing sales workflows and approval processes.
- Automating task reminders, email follow-ups, and notifications.
- Implementing AI-powered insights with Sales Cloud Einstein.

3. Analytics & Reporting

- Implementing real-time dashboards and reports.
- Forecasting sales trends and customer behavior with AI.
- Monitoring key performance indicators (KPIs) across teams.

4.Compliance & Security

- Implementing role-based access control (RBAC).
- Ensuring GDPR, HIPAA, or industry-specific compliance.
- Enabling data encryption and audit logging