



PROPERTY MANAGEMENT APPLICATIONS USING SALES FORCE

DATE	APR 20
TEAM ID	NM2023TMID02685
PROJECT NAME	PROPERTY MANAGEMENT APPLICATIONS USING SALES FORCE
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PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1.Introduction

1.1 Overview:

Property management software allows you to automate and over see various property related function.

1.2 Purpose:

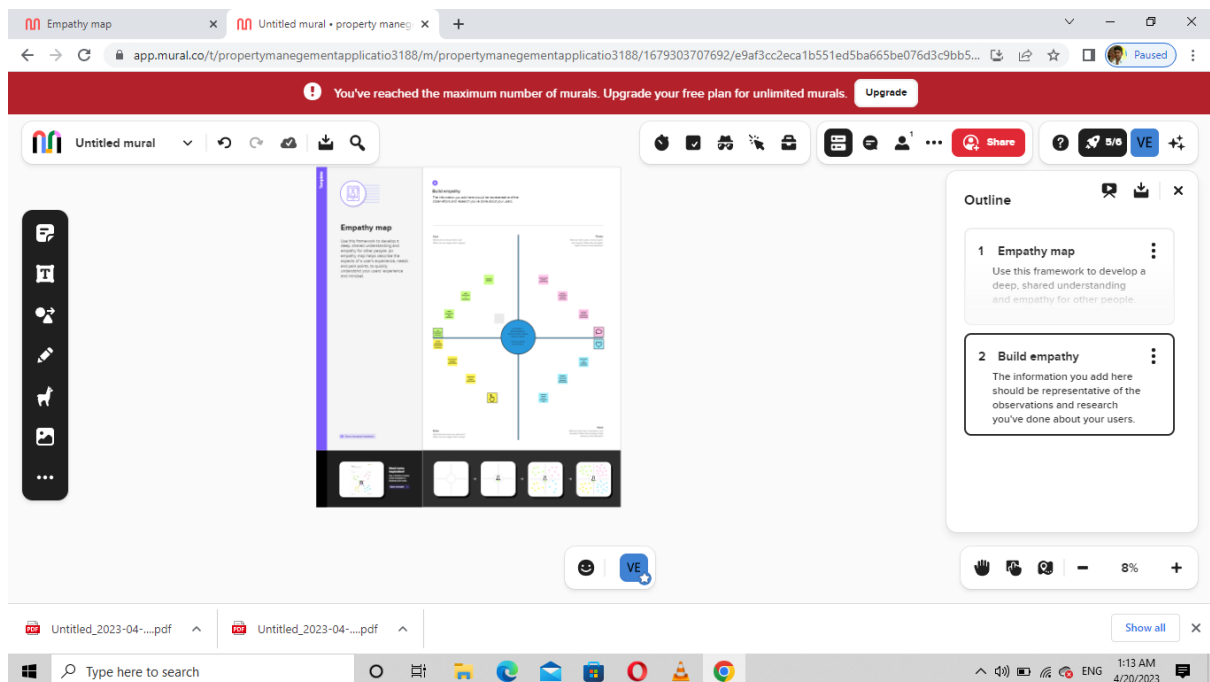
Traditionally a property management system was defined as a system that enabled to manage front.



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2.PROBLEM DEFINITION &DESING THINKING:

2.1 EMAPPHY MAP



3.RESULT

3.1 Data model

Object Name	Field in the object
-------------	---------------------



Customer object	Field Label	Date type
	loan	Auto number
	Rent	URL
	Buy	Number
	Lead	Formula

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3.2 Activity & Screenshot

Milestone 1:



Smart Internz

Login | Salesforce

login.salesforce.com/?locale=in

Paused Update

salesforce

Username
vasanth16@company.sandbox

Password
.....

Caps Lock is on.

Log In

☒ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

Not a customer? [Try for Free](#)

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Sell, market, and service with the world's #1 CRM.

Welcome to the Salesforce Customer Success Platform. Our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.

WATCH DEMOS FREE TRIAL

Marketing

Service

Sales

Jay Sharma
Loyalty Member

20% OFF
sidewalk for loyal customers

Type here to search

7:33 AM 4/19/2023

Milestone 2:



Buy | Salesforce

mrgovtartscollege2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Grml/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

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

Edit Delete

Type here to search

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Milestone 3:

Tabs | Salesforce

mrgovtartscollege2-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

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	Building Block	
Edit Del	Rents	Building	

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Type here to search

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Milestone 4:

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area is titled "Lightning Experience App Manager" and includes a "Clone Apps(Beta)" section with a toggle for "Enable App Cloning" set to "Enabled". Below this is a table listing installed apps.

App Name	Developer Name	Description	Last Modified	Ap...	Vi...
13 PROPERTYMANAGEMENT	PROPERTYMANAGEMENT		18/04/2023, 2:33 pm	Lightning	✓
14 Queue Management	QueueManagement	Create and manage queues for your business.	13/03/2023, 2:01 pm	Lightning	✓
15 Sales	Sales	The world's most popular sales force automation (SFA) ...	13/03/2023, 2:01 pm	Classic	✓
16 Sales	LightningSales	Manage your sales process with accounts, leads, oppor...	13/03/2023, 2:04 pm	Lightning	✓
17 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multipl...	13/03/2023, 2:01 pm	Lightning	✓

Milestone 5:



Loan | Salesforce

mrgovtartscollege2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004GrmY/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Loan

Details

Fields & Relationships
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Type here to search

7:52 AM 4/19/2023

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Milestone 6:

Profiles | Salesforce

mrgovtartscollege2-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000xFRRAU%3FretURL%3D%25...

Search Setup

Setup Home Object Manager

pro

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Scheduler

Connecting...

SETUP
Profiles

Profile ydvdqwk1

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Edit Clone Delete View Users

Name	ydvdqwk1	Custom Profile	✓
User License	Salesforce		
Description			
Created By	vasanthi Elango, 19/04/2023, 2:52 am	Modified By	vasanthi Elango, 19/04/2023, 2:56 am

Page Layouts

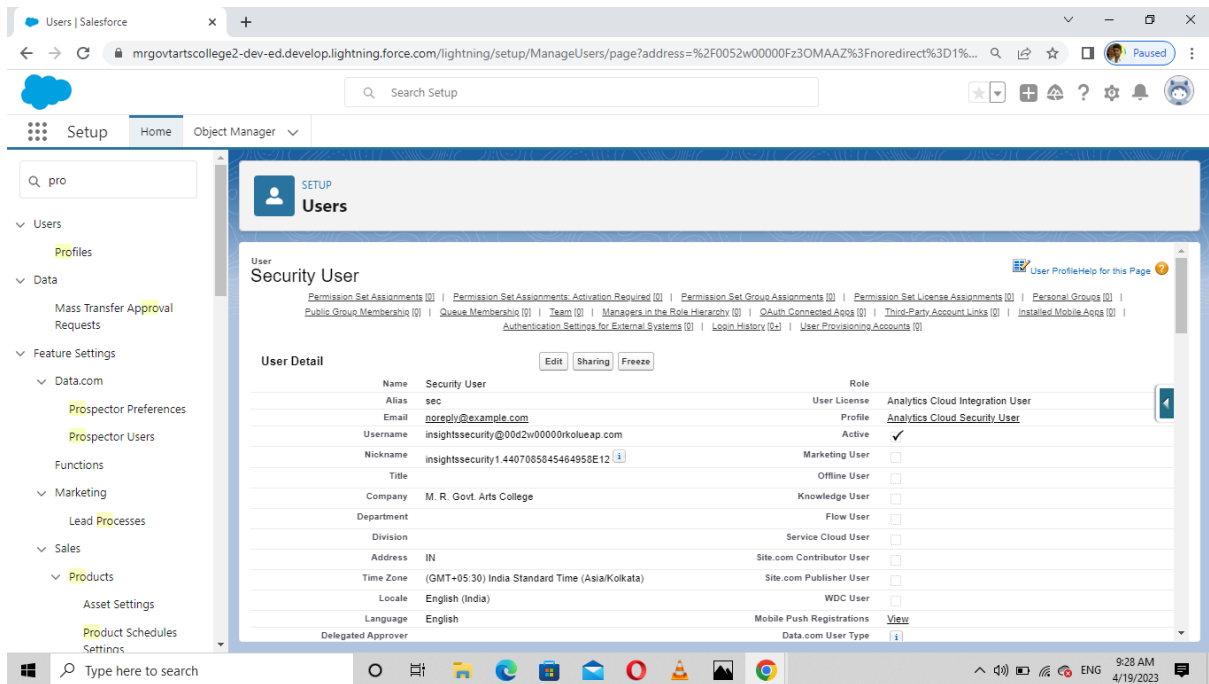
Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]

Type here to search

9:27 AM 4/19/2023



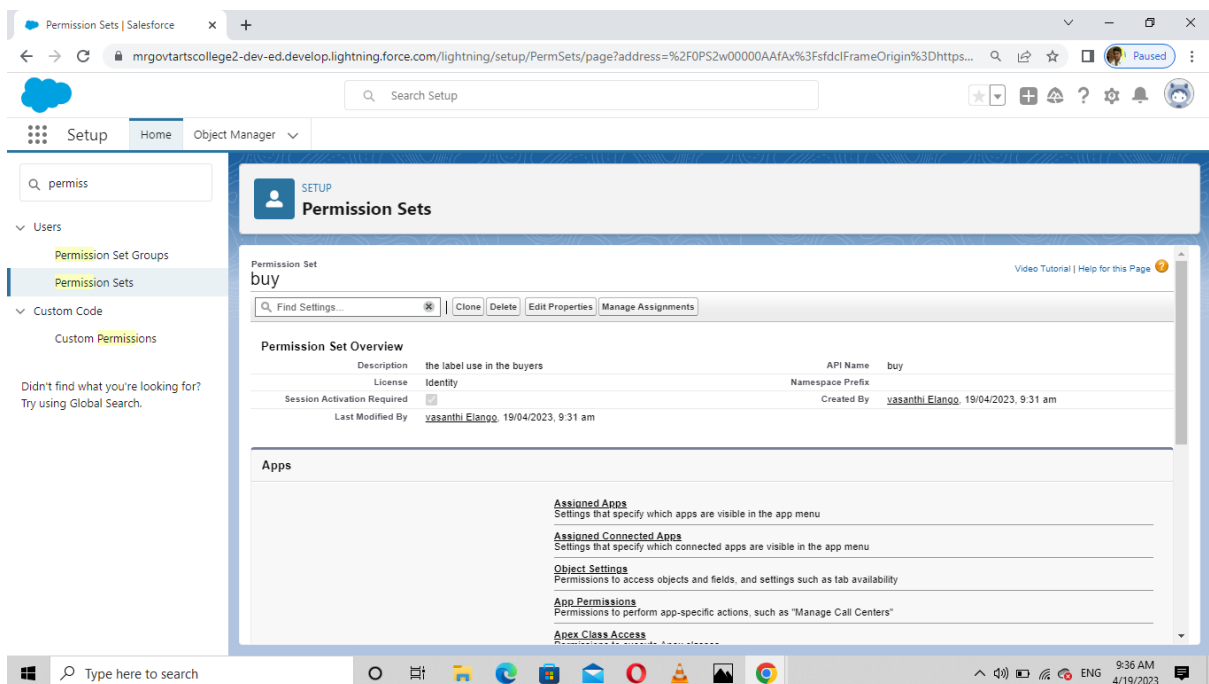
Milestone 7:



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'pro' and a list of categories: Users, Profiles, Data, Feature Settings, Data.com, Prospect Preferences, Prospect Users, Functions, Marketing, Lead Processes, Sales, Products, Asset Settings, Product Schedules, and Settings. The main content area is titled 'Users' and shows a 'Security User' profile. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver. The 'Role' section shows the 'Analytics Cloud Integration User' role with a 'User License' of 'Analytics Cloud Security User'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Mobile Push Registrations' checkbox is unchecked. The 'Data.com User Type' checkbox is unchecked.

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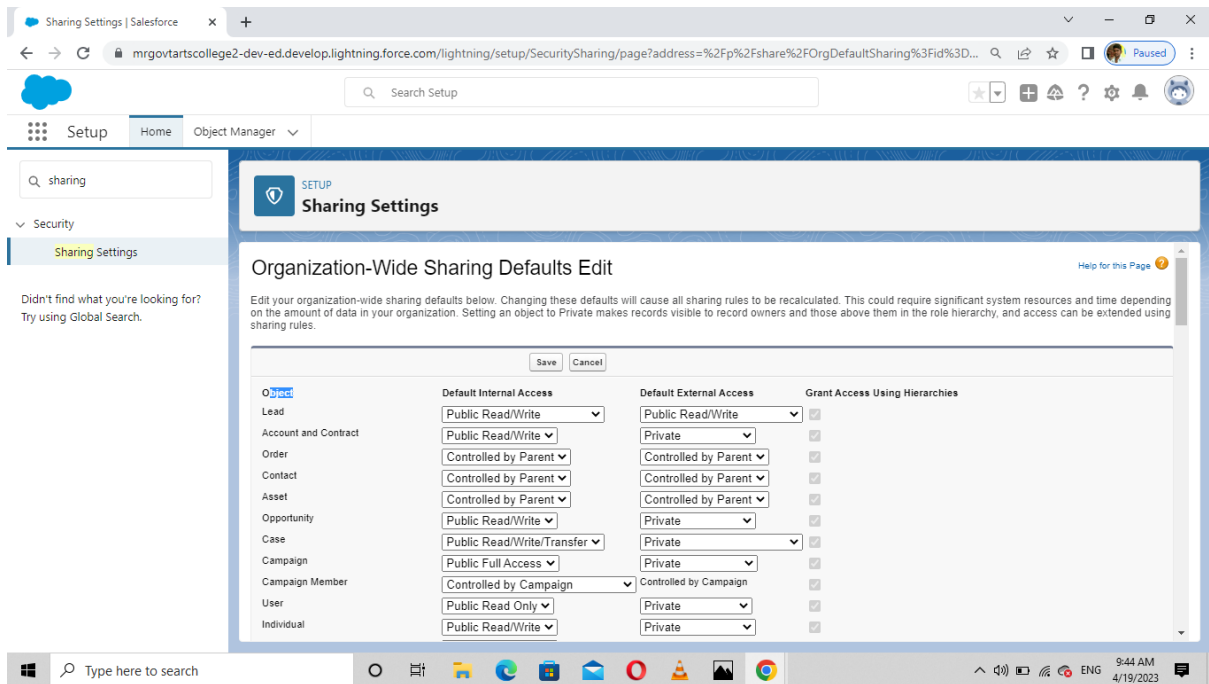
Milestone 8:



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar with 'permis' and a list of categories: Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and shows a 'buy' permission set. The 'Permission Set Overview' section includes fields for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. The 'Apps' section lists 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'Apex Class Access'.



Milestone 9:

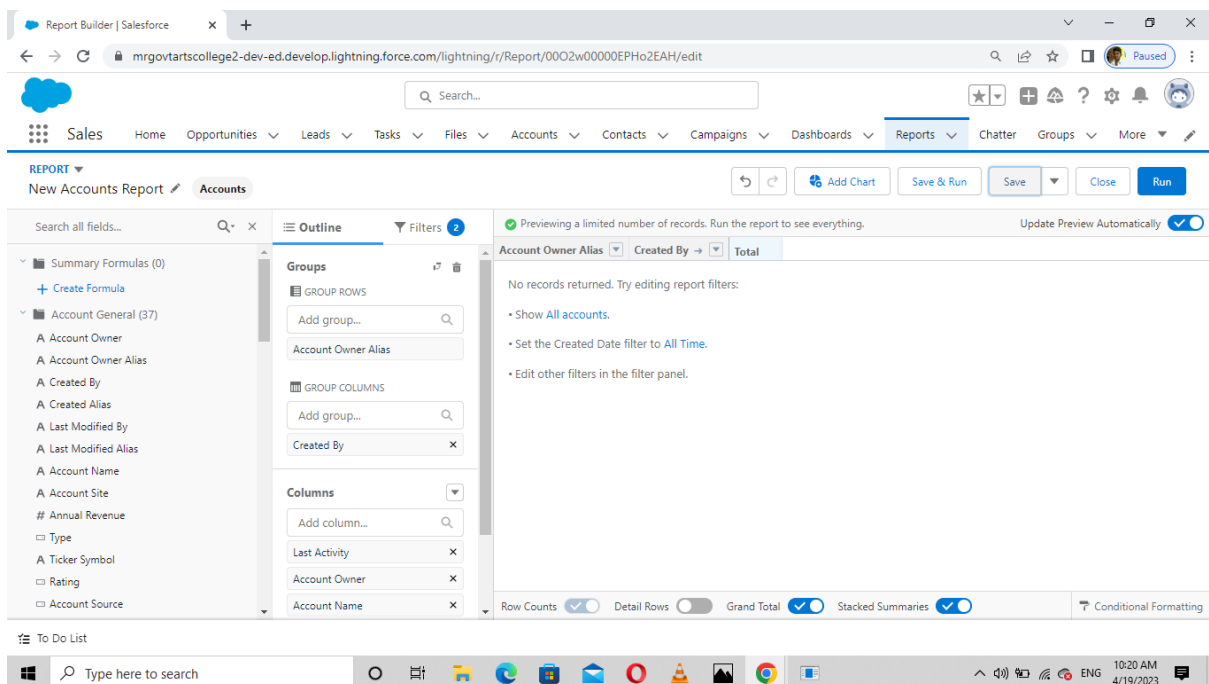


The screenshot shows the Salesforce Setup page for Sharing Settings. The page title is "Sharing Settings" and the subtitle is "Organization-Wide Sharing Defaults Edit". The page contains a table with columns for "Object", "Default Internal Access", "Default External Access", and "Grant Access Using Hierarchies". 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	Public Read/Write	<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"/>

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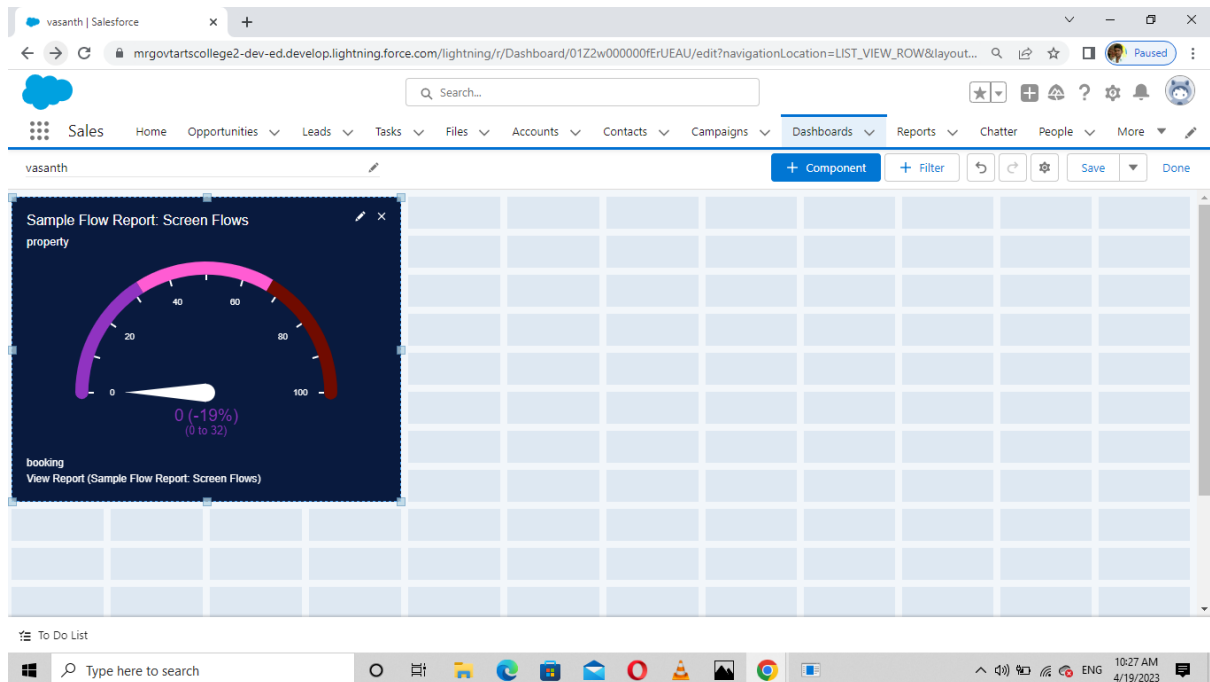
Milestone 10:



The screenshot shows the Salesforce Report Builder interface. The report is titled "New Accounts Report" and is based on the "Accounts" object. The report is currently in "Preview" mode, showing a message: "No records returned. Try editing report filters:". The report is configured with the following filters: "Account Owner Alias" and "Created By". The report is displayed in a table with columns: "Account Owner Alias", "Created By", and "Total". The report is also configured with the following columns: "Last Activity", "Account Owner", and "Account Name". The report is displayed in a table with columns: "Last Activity", "Account Owner", and "Account Name".



Milestone11:



4.TRAILHEAD PROFILE PUBLIC URL:

Team Leader :<https://trailblazer.me/id/vasanth132>

Team Member 1:<https://trailblazer.me/id/>

Team Member 2:<https://trailblazer.me/id/>

Team Member3:<https://trailblazer.me/id/kmurugesan28>

5. ADVANTAGES &DISADVANTAGES:



5.1 ADVANTAGES:

- ✓ Screen out problem tenants.
- ✓ Market your rental.
- ✓ Avoid potential legal issues.
- ✓ Reduce your rental headaches.

5.2 DISADVANTAGES:

- ✓ One top of that there might be a learning fee.
- ✓ This fee goes toward the marketing of your home.

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6. APPLICATIONS:

- ✓ Rental property management .
- ✓ Landlordy property management.
- ✓ Appfdio property management.
- ✓ Rent ok property management.

7. CONCLUSION:

- ✓ In conclusion property management system software is very crucial for all the hotels.



8.FUTURE SCOPE:

- ✓ Make sure tenant screening also takes care and gives assurance for safety of property.
- ✓ So all the owners and management company like this way.