GOVERNMENT OF TAMILNADU

Naan Muthalvan - Project-Based Experiential Learning

A REVIEW OF PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

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M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

(Affiliated To Mother Teresa Women's University, Kodaikanal)
Reaccredited with "A" Grade by NAAC
DINDIGUL-624001.

APRIL - 2023

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BONAFIDE CERTIFICATE

This   is   to certify that   this is a bonafide record of   the project entitled, "PROPERTY MANAGEMENT APPLICATION USING SALESFORCE" done by V.VAISHNAVI (20321ER061), T.VIJAYALAKSHMI (20321ER062), S.VIVEKA RATHNA (20321ER063), P.YOGA LAKSHMI (20321ER064),M.YUVARANJANI (20321ER065) .This is submitted in partial fulfillment for the award of the degree of Bachelor of Science in Mathematics in M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN,DINDIGUL during the period of December 2022 to April 2023.

Project Mentor(s)   **Head of the Department**

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PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1.   INDROTUCTION

Salesforce is a cloud-based software company that provides its customers with a platform to develop their own applications without following the tough steps that they used to follow in the legacy system. The software or application once created can be uploaded onto the cloud allowing the end-users to view them.

1.1   Overview

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.
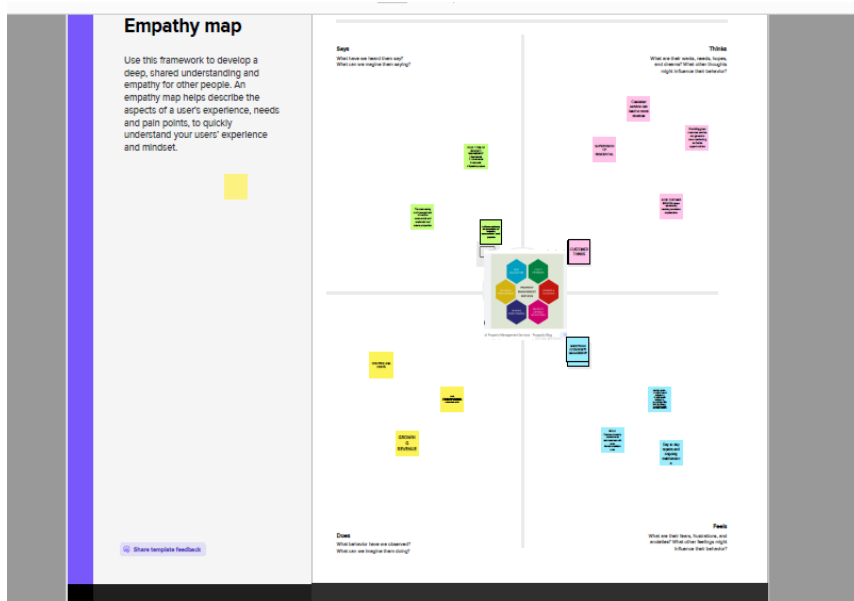
1.2   Purpose

In this project,

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce

2   PROBLEM DEFINITION AND DESIGN THINKING

2.2   Empathy Map

2.2   Ideation & Brainstorming map

Buy

Field label	Data type
Property Type	Picklist
Discount	Percentage
State	Picklist
City	Picklist
Annual Amount to be paid	Picklist

Rent

Field label	Data type
Rent	Auto Number
Rental City	Text
BHK type	Picklist

Loan

Field label	Data type
Loan Id	Auto generated
Interest Rate	Currency
Term	Number
Annual loan	Number
Total Loan Instalments	Number
Loan Repayment	Number
Loan Amount	Formula

	Field Label	Data type	
	Lead	Auto Number	
	State	Picklist	
Lead	City	Picklist	
	Email	Email	
	Phone	Phone	

3.2 Activity & Screenshot

Milestone 1- Salesforce

ACTIVITY 1:

Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/

2. Click on sign up.

3. On the sign up form, enter the following details :

a. First name & Last name

b. Email

c. Role : Developer

d. Company : College Name

e. County : India

f. Postal Code : pin code

g. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign up after filling these.

Activity 2:

Account Activation

1.Go to the inbox of the email that you used while signing up. Click on the verify account to activate your activation.

2. Login To Your Salesforce Account
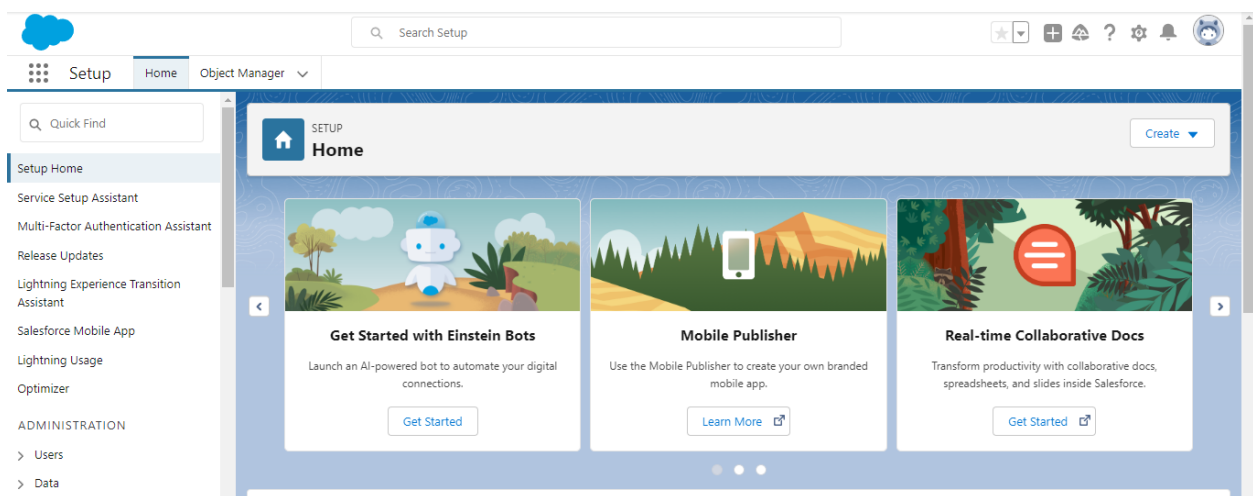
Milestone 2-Object

ACTIVITY 1*:*

To Navigate to Setup page

1. Click on gear icon then click setup.

To create an object:

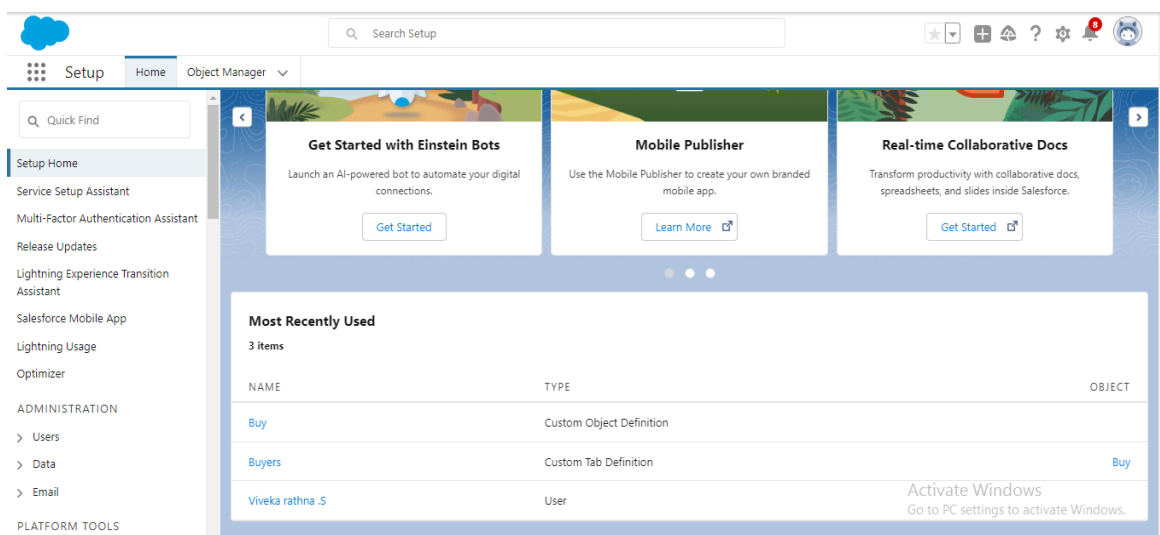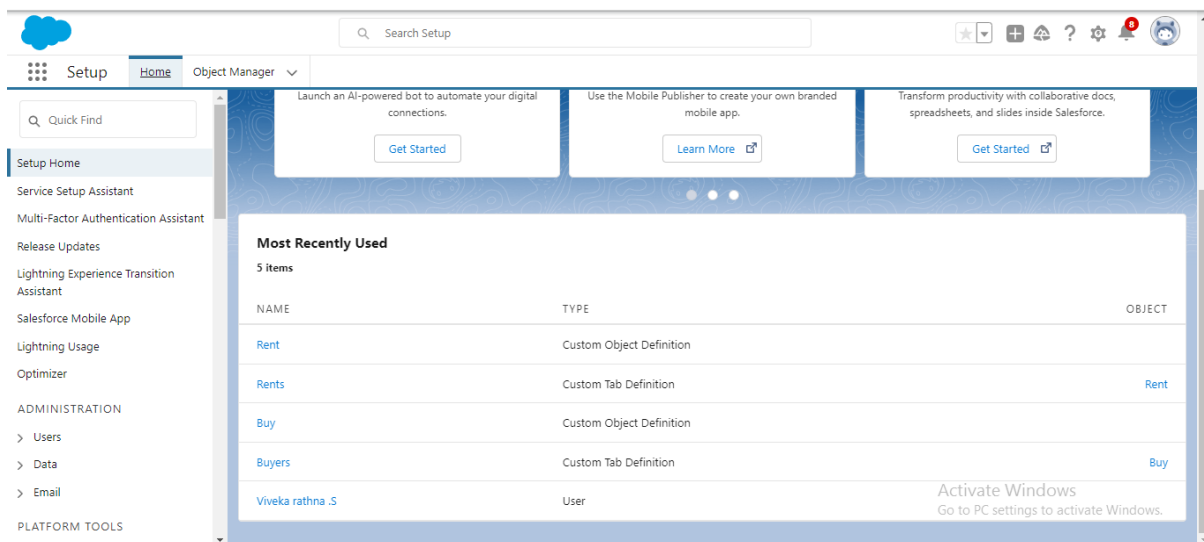2. From the setup page then Click on Object Manager then Click on Create then Click on Custom

Object.

On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search then SAVE

ACTIVITY 2:

Create Object Buy

1. To create an object:

2. From the setup page then Click on Object Manager then Click on Create then Click on Custom Object.

3. Enter the label name then Buy

4. plural label name then Buyers

5. click on Allow reports,

6. Allow search then Save

Create Object Rent

1. To create an object:

2. From the setup page then Click on Object Manager then Click on Create then Click on Custom Object.

3. Enter the label name then Rent

4. plural label name then Rents

5. click on Allow reports,

6. Allow search then Save

Create Object Loan

1. To create an object:

2. From the setup page then Click on Object Manager then Click on Create then Click on Custom Object.

3. Enter the label name then Loan

4. plural label name then Loans

5. click on Allow reports,

6. Allow search then Save
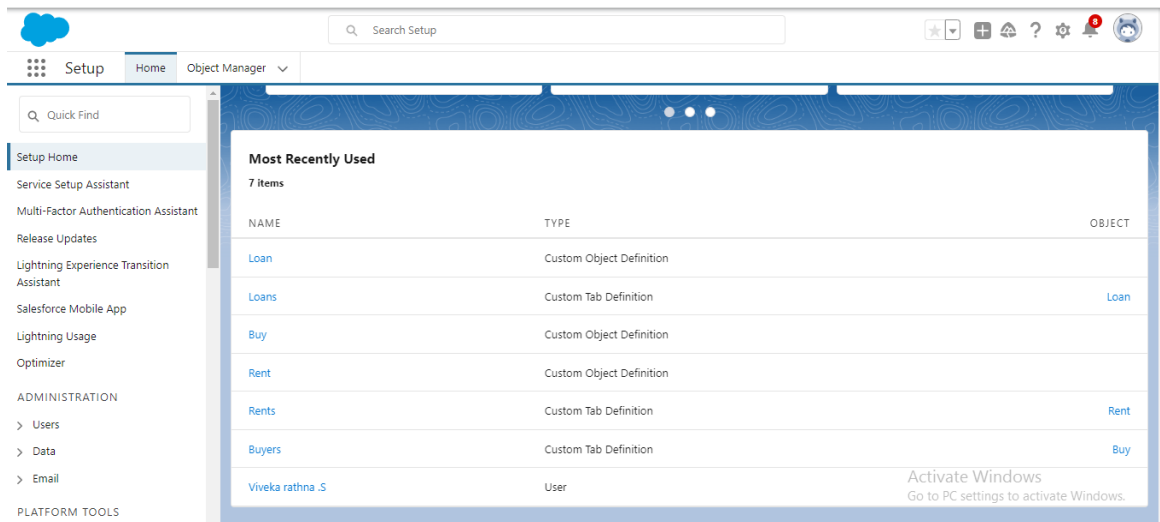
Milestone 3: Tab

ACTIVITY 1:

Create the Lightning Tab

To create a Tab:(Lead)

1. Go to setup page then type Tabs in Quick Find bar then click on tabs then New (under custom object tab)

2. Select Object(Lead) then Select the tab style then Next (Add to profiles page) keep it as default then Next (Add to Custom App) keep it as default then Save.
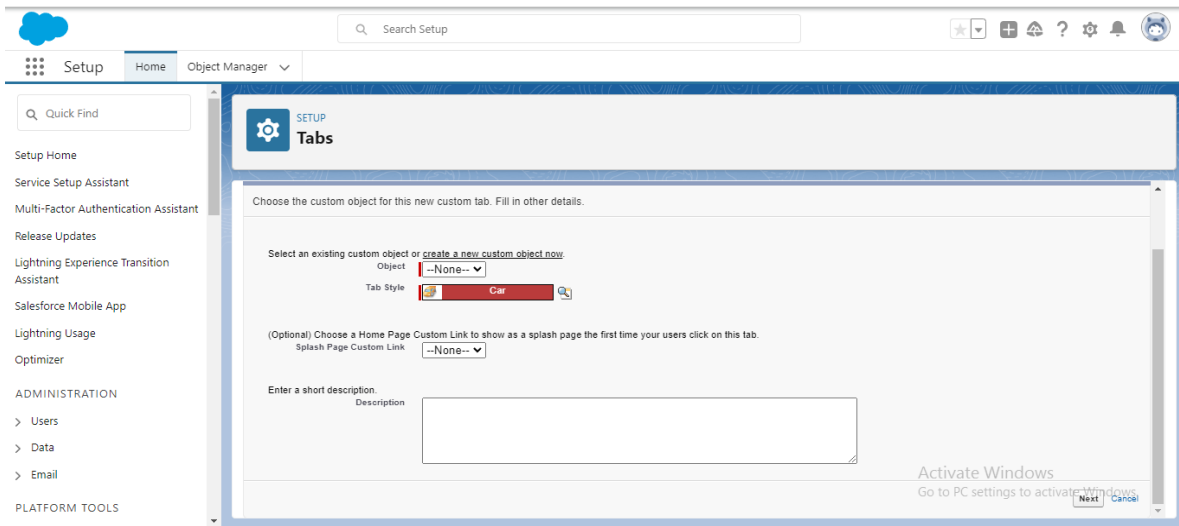
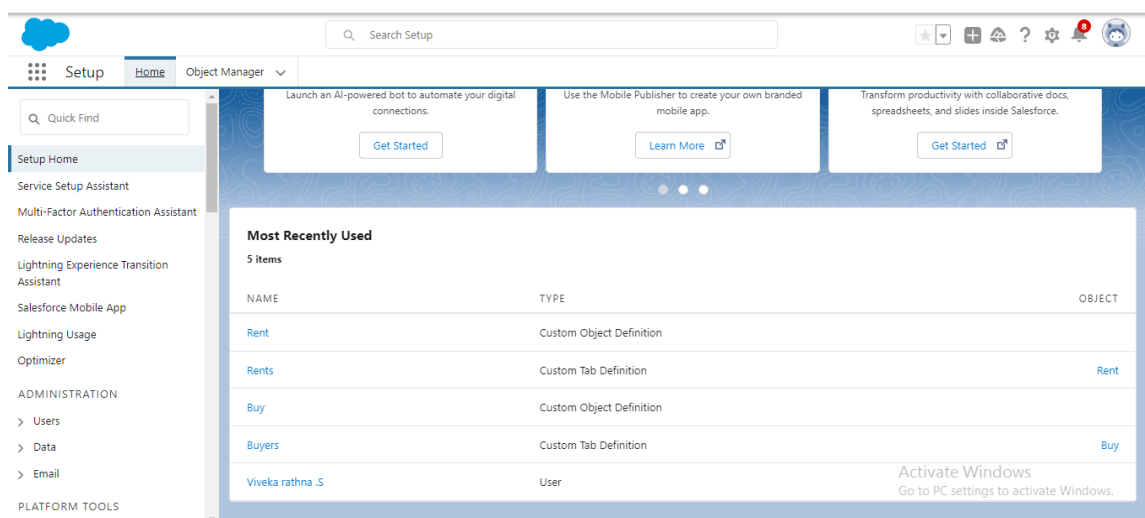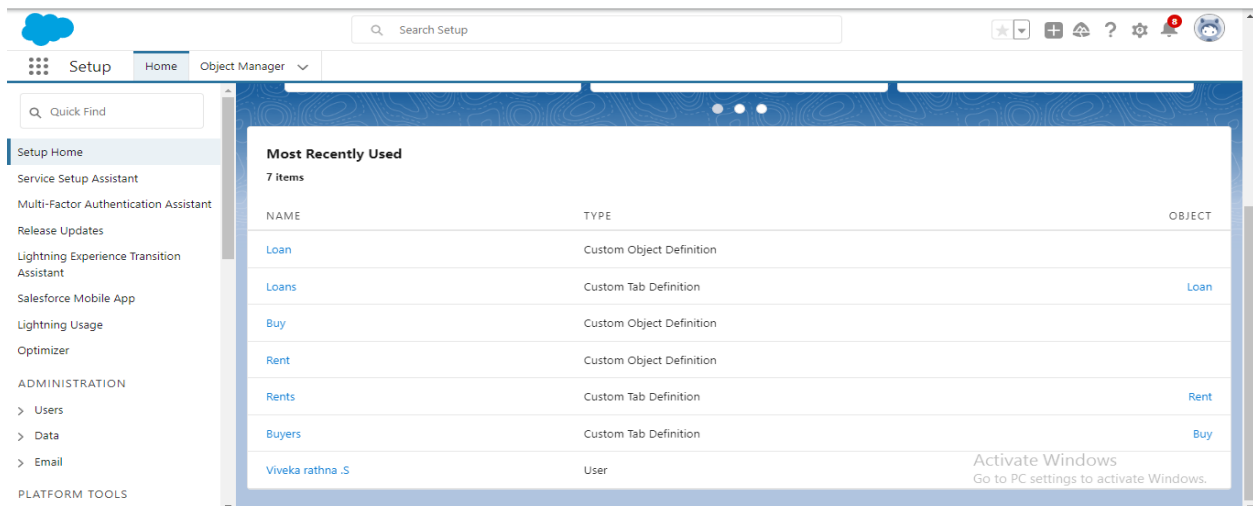## ACTIVITY 2:

To create a Tab:(Buy)

To create a Tab:(Lead)

1. Go to setup page then type Tabs in Quick Find bar then click on tabs then New (under custom object tab)

2. Select Object(Buy) then Select the tab style then Next (Add to profiles page) keep it as default then Next (Add to Custom App) keep it as default then Save
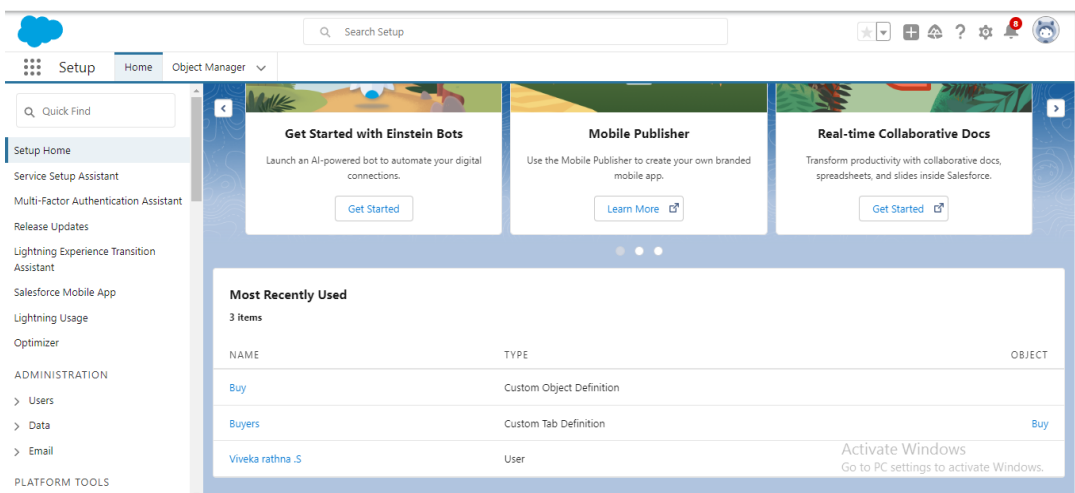
To create a Tab:(Rent)

1. Go to setup page then type Tabs in Quick Find bar then click on tabs then New (under custom

object tab)

2. Select Object(Rent) then Select the tab style then Next (Add to profiles page) keep it as

default then Next (Add to Custom App) keep it as default then Save.

ACTIVITY 4:

To create a Tab:(Loan)

1. Go to setup page then type Tabs in Quick Find bar then click on tabs then New (under custom

object tab)

2. Select Object(Loan) then Select the tab style then Next (Add to profiles page) keep it as
default then Next (Add to Custom App) keep it as default then Save.

Milestone 4 - The Lighting App

Create the Lightning App

1. Go to setup page then search "app manager" in quick find then select "app manager" then click on New lightning App.

2. Fill the app name as an Property Management in app details and branding then Next then (App option page) keep it as default then Next

3. (Utility Items) keep it as default then Next then(Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) then Next then (Add User Profile) Add System Administrator, Salesforce platform user, Standard User then Next.

4. To Add Navigation Items:
Select the items from the search bar and move it using the arrow button then Next.

5. To Add User Profiles:
Search profiles in search bar then click on the arrow button then save & finish.
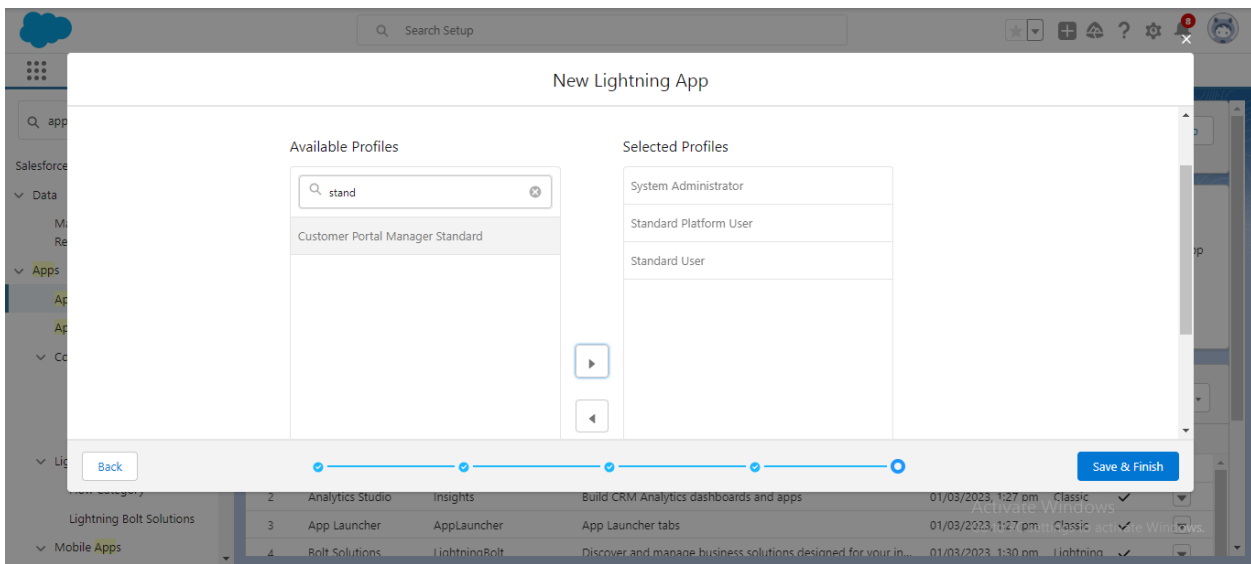
Milestone-5 Fields

ACTIVITY 1:

Create the Lead Field

1. Go to setup then click on Object Manager then type object name in search bar then click on the object

2. Now click on "Fields & Relationships " then New.

3. Fill the field label name Lead then Next then Next then Save.

Create the remaining Fields:

Follow the Above Steps to create the Field just change the Labels for Below Fields

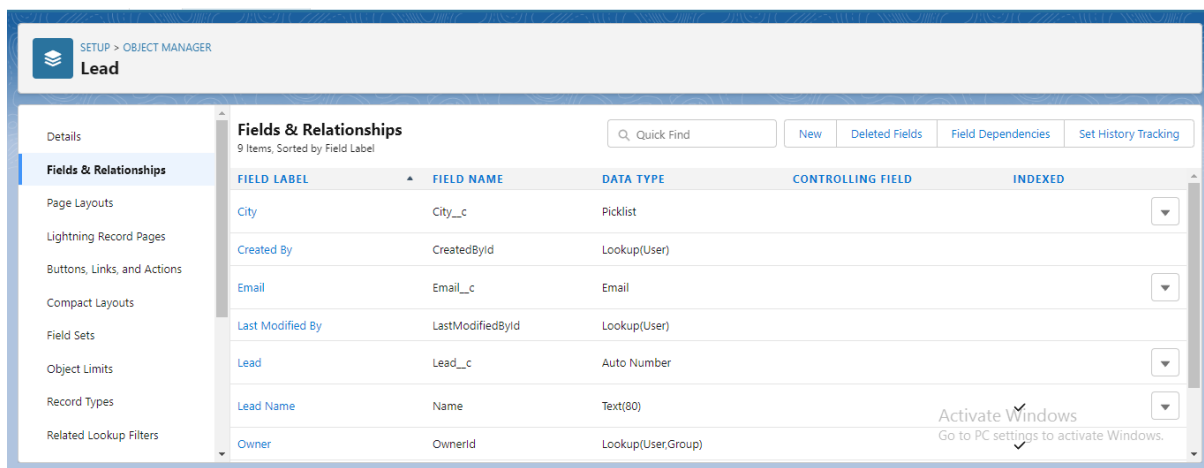Lead:(AutoNumber Created Field while creating Object) then L-{0000}

State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

City:Create the Picklist(Mumbai, Pune, Nashik)(Field Dependency)

Email: Create the Email Select the Data Type As Email (Email)

Phone:Select the Field Data type as (Phone)

In the Fields and Relationship go to the Field Dependencies

ACTIVITY 2:

Create For Object Buy

1. Create Field for Buy

2. Create Property Type: (Picklist) (Residential, Commercial, Industrial)

3. Discount:(Percentage As the Field Data Type)

4. State:Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

5. City:(Take Any City for Field Dependency)

6. Annual Amount To Be Paid
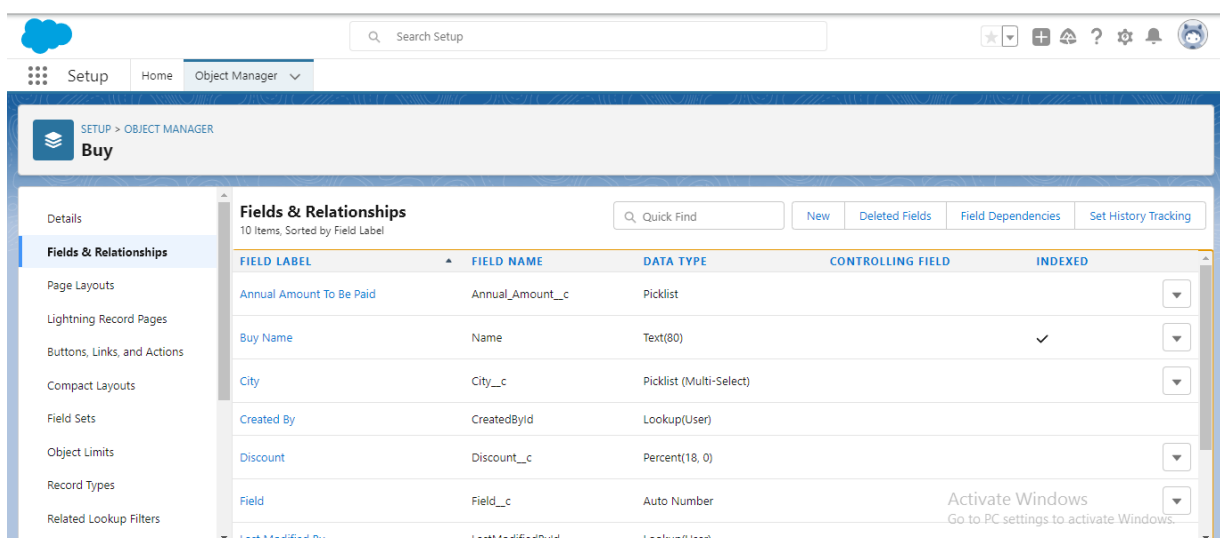
ACTIVITY 3:

Create Field for Rent

1. Rent:(Auto Number while Creating the object)? R-{0000}

2. Rental City:Select the Text as the Field Data Name(Any City)

3. BHK type:(Picklist) (1BHK, 2BHK,3BHK)
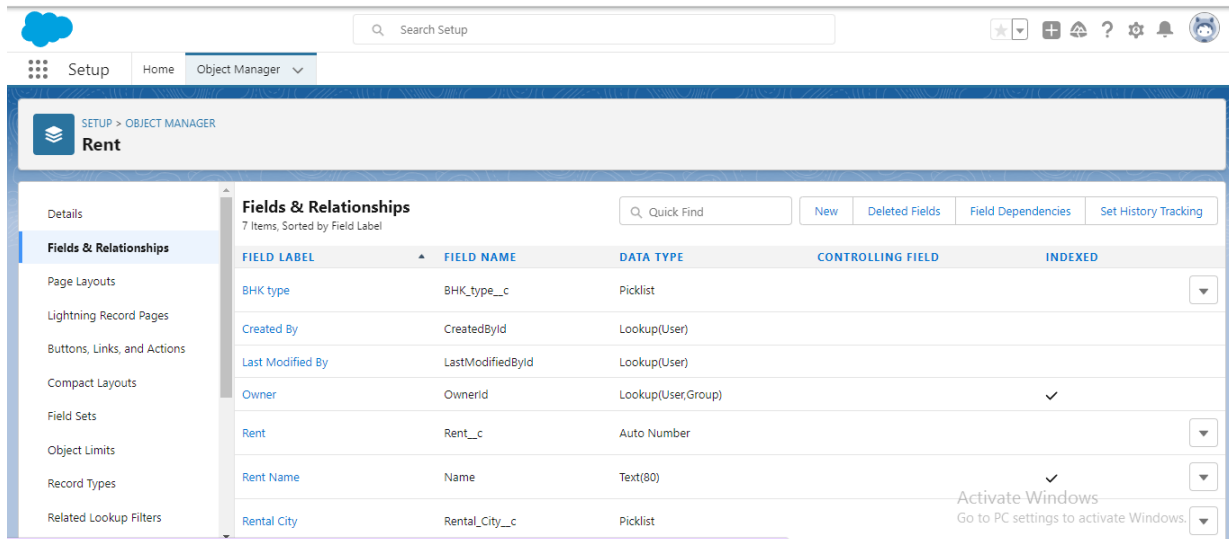
ACTIVITY 4:

Create Field for Loan

1. Loan Id: Auto generated Field Take it as Autonumber LN-{0000}

2. Interest Rate: (Select the Field Data Type As Currency)

3. Term:(Select the Field Data type as Number)

4. Annual Loan Field create the Number as the field data type

5. Total Loan Instalments:(Field create the Number as the field data type)

6. Loan Repayment(Field create the Number as the field data type)

7. Loan Amoun(Select the Field data type as Formula)

8. For the Loan Object? Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula

(Loan_Repayment__c * (((1+(Interest_rate__c /52))^ Term__c) -1))/((

Interest_rate__c /52)*((1+(Interest_rate__c /52))^ Term__c))

##Check the syntax below whether the formula syntax is correct or not

Milestone 6: Profile

ACTIVITY 1:

To create a new profile

1. Go to setup then type profiles in quick find box then click on profiles then clone the desired profile (standard user is preferable) then enter profile name then save

2. Enter a Profile Name
3. While still on the profile page, then click Edit.

4. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile

5 Sales Manager then Standard user Profile , Marketing Executive1 and Executive2 then Standard Platform User, Marketing Manager then Standard Platform User For
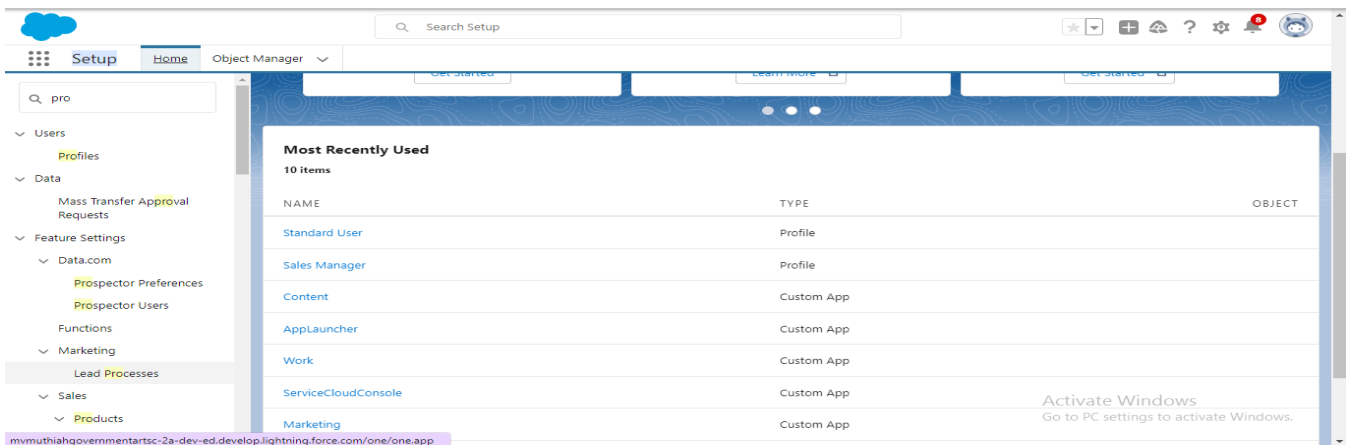
ACTIVITY 2:

Marketing

1. Then In The Profile Level Give Read and Create Access to Marketing Executive and Read, Create, Edit, Delete for the Marketing manager

2. Marketing Manager Should Have Access to Marketing Executive
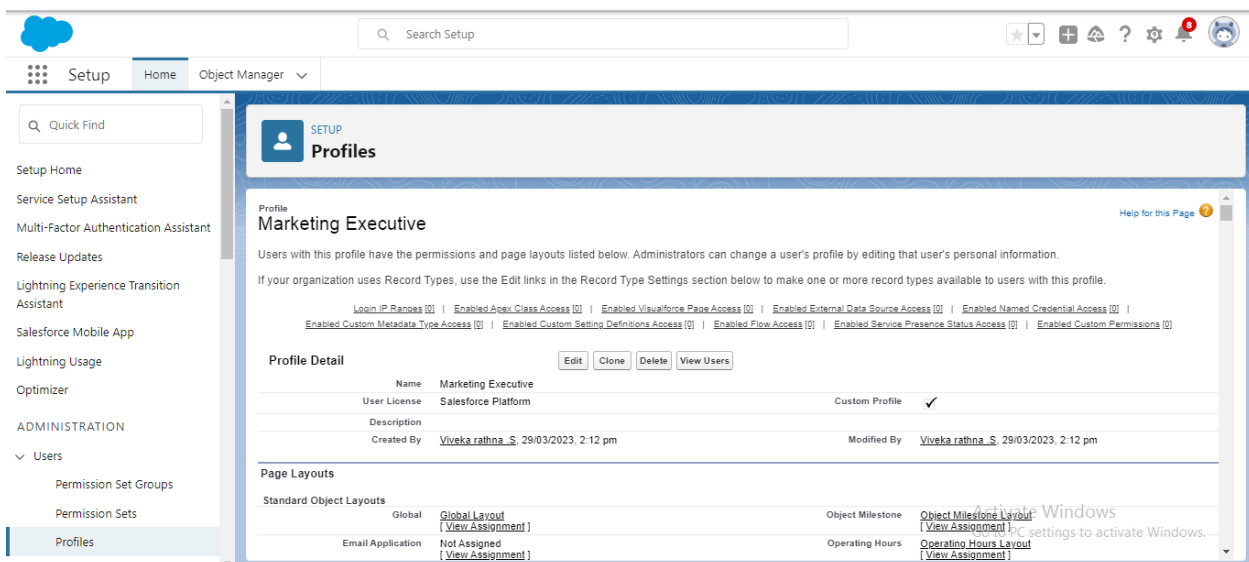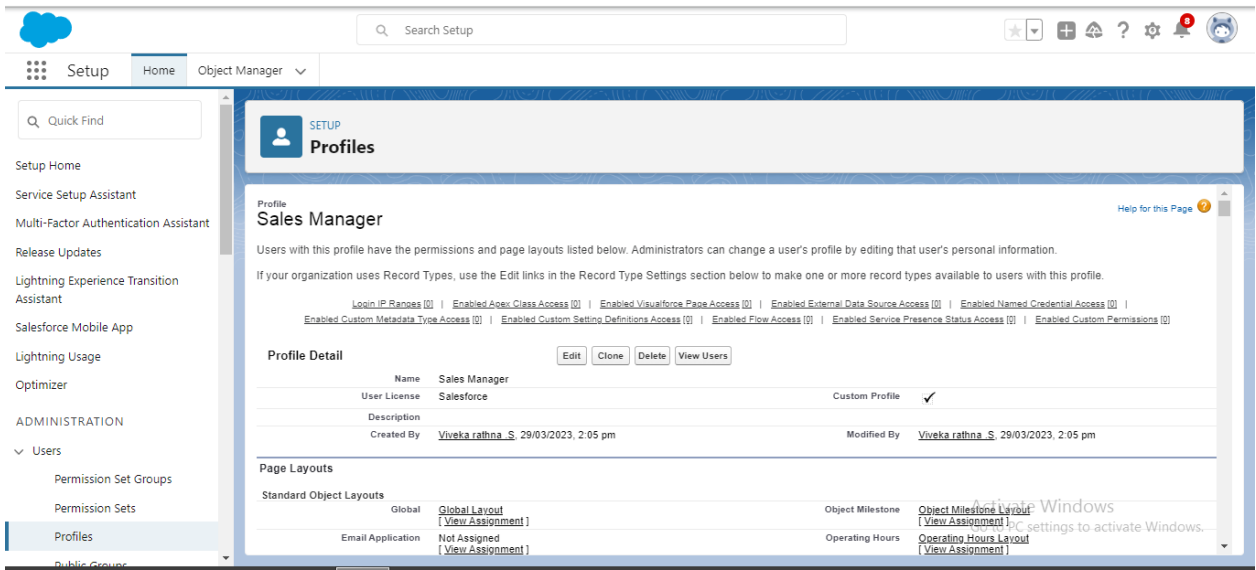

ACTIVITY 3 :

Sales

1. In the Profile Level Sales Manager is Having Create, Edit, Delete

2. For Sales Rep1 then Read, Create, Edit

3. For Sales Rep2 then Read, Create, Edit

4. For Sales Rep3 then Read only.

Milestone 7 New User

ACTIVITY 1:

New User

1. A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.

2. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.
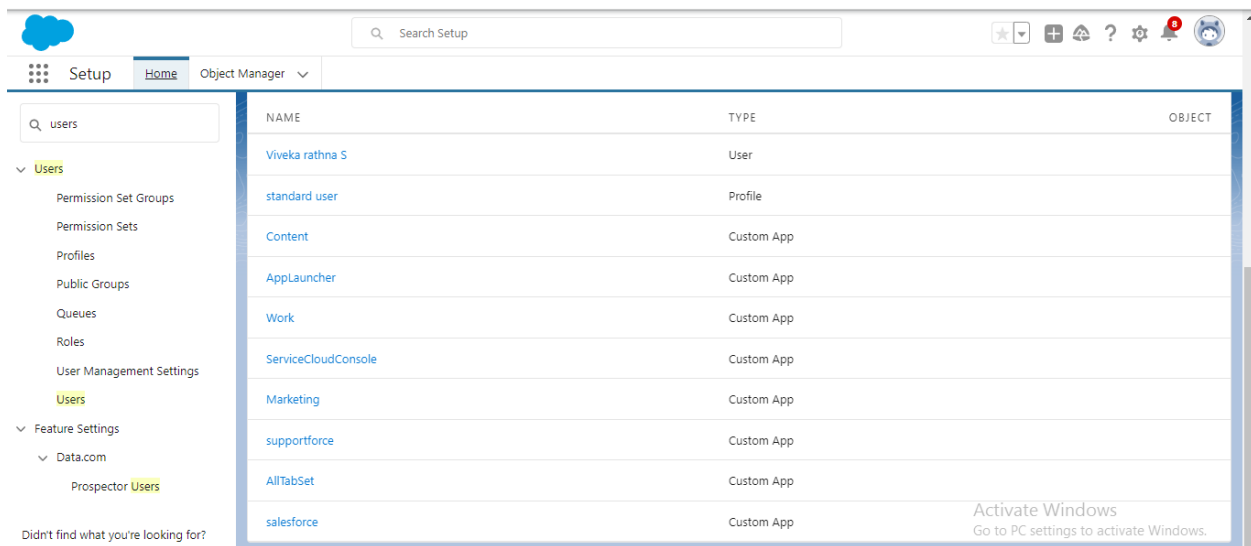
Milestone 8 - Permission Set

ACTIVITY 1:

Create the Permission Sets

1. Go to setup then type "permission sets" in quick search then select permission sets then New.

2. Enter the label name then save.

3. After saving the permission click on the Manage assignment.

4. Now click on the Add Assignment.

5. Now select the users and click on save.

6. Go to permission set and add the access For Sales Rep3 give Access with Create permission for the User.
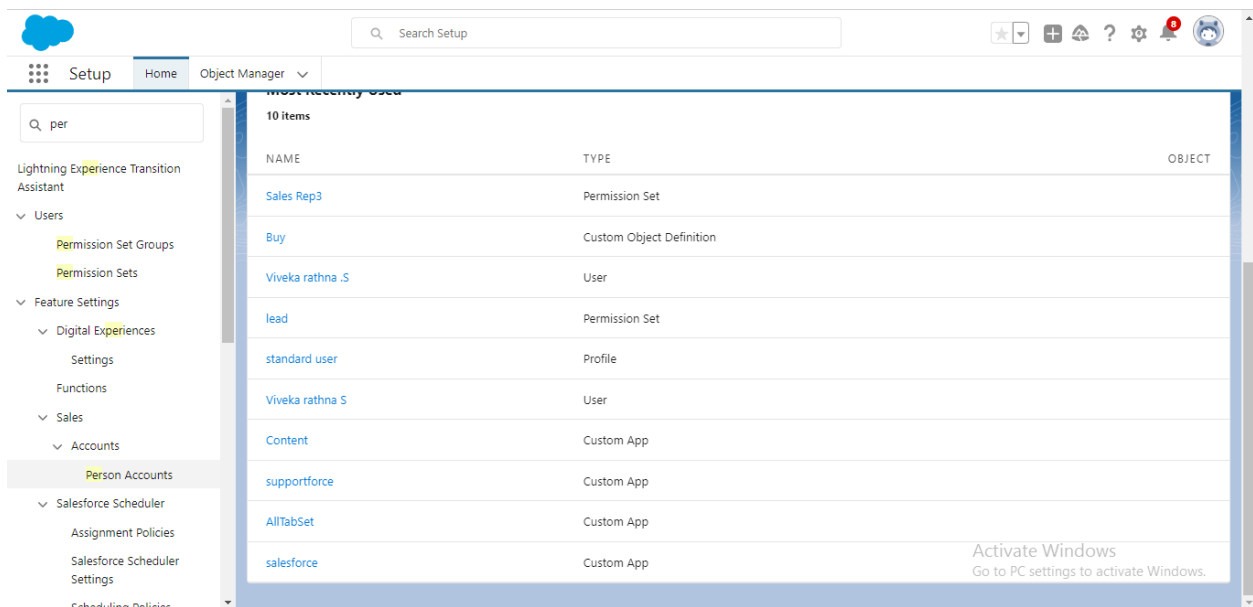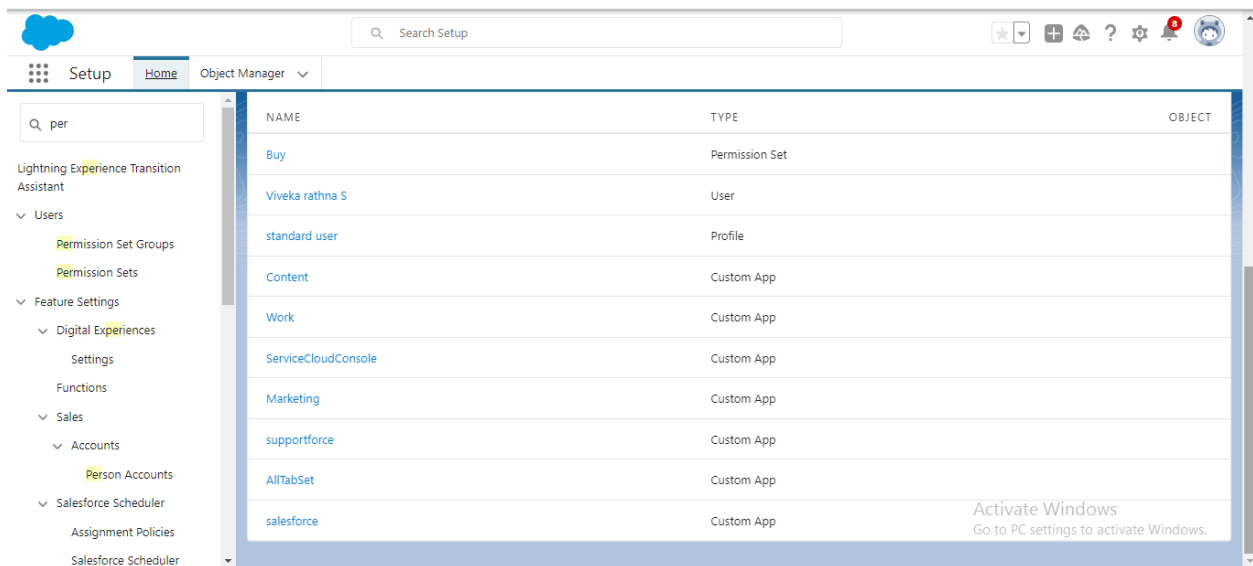
Milestone 9: Setup for OWD

ACTIVITY 1:

Create OWD Setting

1. Setup, use the Quick Find box to find Sharing Settings.

2. Click Edit in the Organization-Wide Defaults area.

3. For each object, select the default access you want to give everyone.

4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Lead, Rent custom object

5. Click Edit and from the Drop Down select private for internal and external

6. This Setting is for all the User Which have been Created
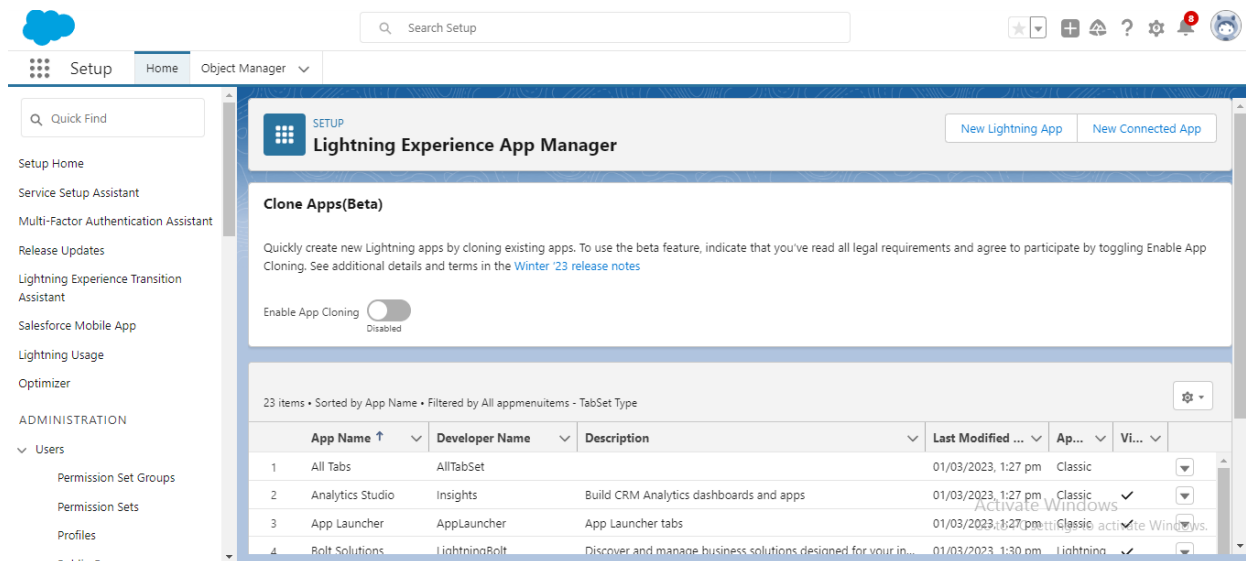
ACTIVITY 2:

Marketing & Sales

Marketing

1. Create the Record Level OWD Setting give it As A Private To Marketing manager And Marketing Executive

Sales

1. Sale Manager OWD is Set As Private similarly sales Rep1, Sales Rep2 same OWD for them
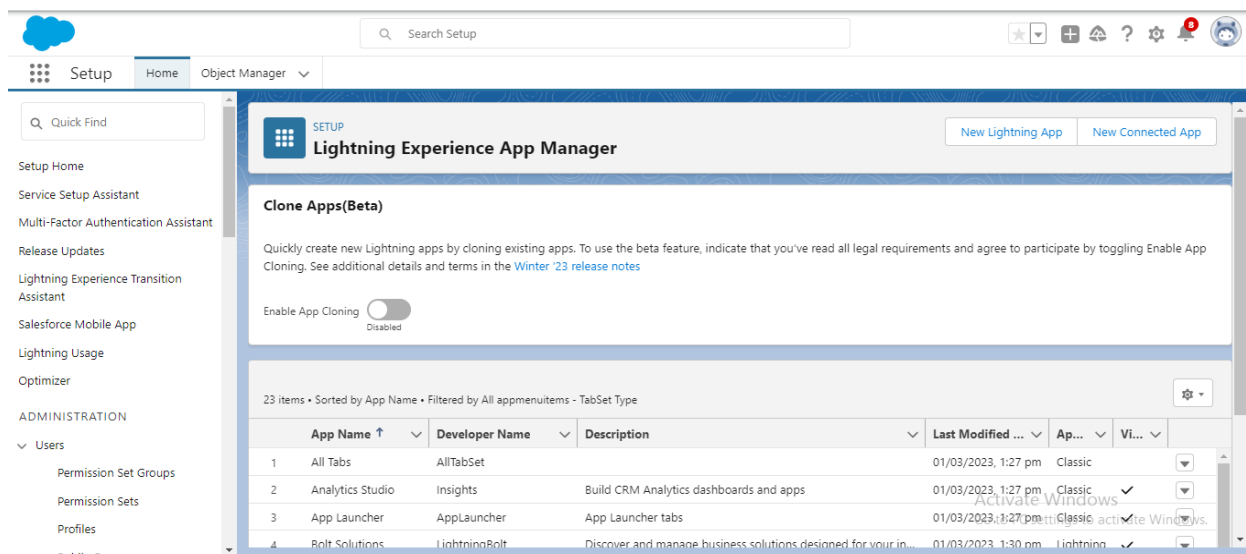
Milestone 10- Report

Create Report

1. Go to the app then click on the reports tab

2. Click New Report

3. Select report type from category or from report type panel or from search panel ? click on start report.

4. Customize your report, then save or run it.
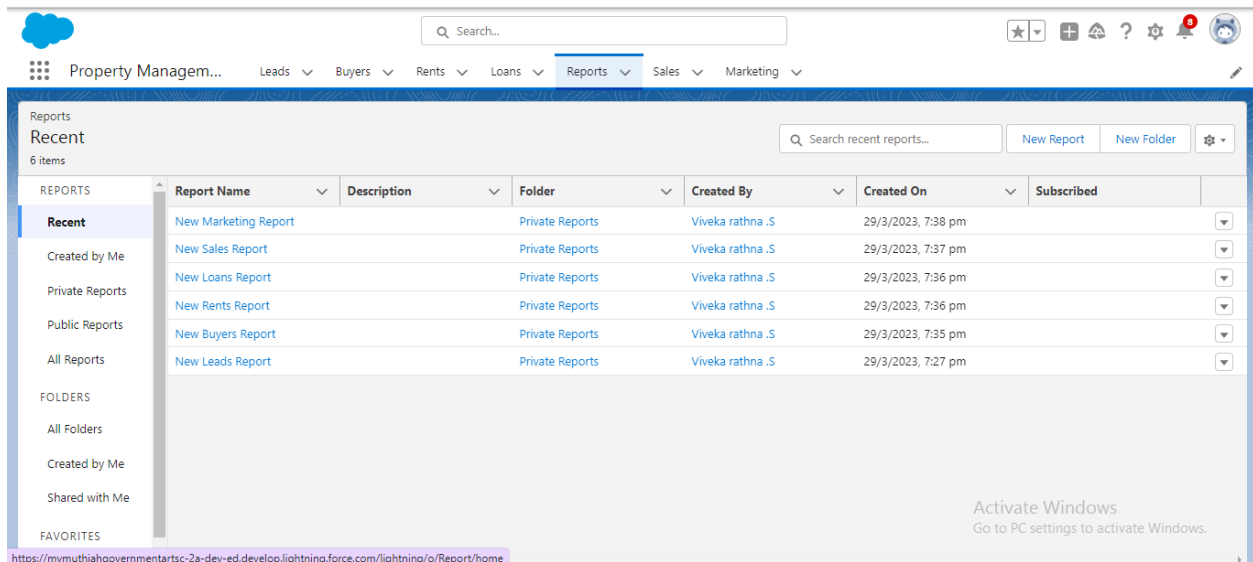
Create Report 2

Create Report for following Condition

1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the Property

2. The Condition should be Like Loan Amount >= to 5000$

Milestone 11- Dashboards

ACTIVITY 1:

Create dashboards

1. Go to the App Launcher and select the Dashboards

2.   Select   add   component

3. Select the folder select the following option new lead with loan Amount

4. Select in which format you want display chart

ACTIVITY 2:

Create Dashboard 2

1. Create the Dashboard for the Same Take Any Type of Dashboard(Chart) And Display It

on The App Home Page

4   Trailhead Profile Public URL

Team Lead –https://trailblazer.me/id/yoga64

Team Member 1-https://trailblazer.me/id/vaishu9850

Team Member 2-https://trailblazer.me/id/lakshmit6

Team Member 3-https://trailblazer.me/id/rathna2002

Team Member 4-https://trailblazer.me/id/yuva2001

5   ADVANTAGES & DISADVANTAGE

ADVANTAGES

1.. You can access your information from anywhere

2..You will save time and money by being more efficient

3..Guest satisfaction may increase with a smooth check-in process

4.. You will increase bookings by refining your online presence

5..You can optimize your revenue stream using built-in pricing tools

DISADVANTAGES

1..You will be dependent on one vendor

2.. Cost can be prohibitive in the beginning

3.. All in one is not always best.

6 APPLICATIONS

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. A property management system is sometimes referred to as a hotel operating system or hotel OS

- ➢ DoorLoop. Get a fully customizable property management software that helps manage your properties from one place. ...
- ➢ Buildium. ...
- ➢ Yardi Breeze. ...
- ➢ AppFolio Property Manager. ...
- ➢ PayHOA. ...
- ➢ ManageCasa. ...
- ➢ Rent Manager. ...
- ➢ Rentroom.

7 CONCLUSION

Property Management System (PMS) software is very crucial for all the Hotels. Especially Opera PMS constitutes the most appropriate PMS software for Hilton Athens. It is user friendly, connects with Central Reservation System (CRS), Point of Sale (POS) etc. and provides all the tools the hotel needs in order to operate effectively.