



# GOVERNMENT OF TAMILNADU

## Naan Muthalvan - Project-Based Experiential Learning

### A REVIEW OF PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

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PG AND RESEARCH DEPARTMENT OF MATHEMATICS



**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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PG & RESEARCH DEPARTMENT OF MATHEMATICS

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. INTRODUCTION

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.

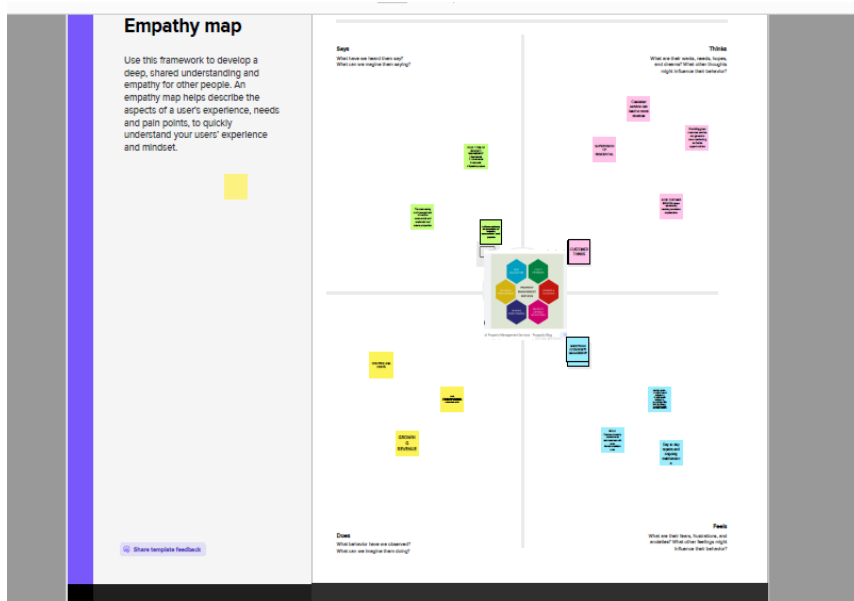
### 1.2 Purpose

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		<b>Field label</b>	<b>Data type</b>	
		Property Type	Picklist	
		Discount	Percentage	
		State	Picklist	
		City	Picklist	
		Annual Amount to be paid	Picklist	
Rent		<b>Field label</b>	<b>Data type</b>	
		Rent	Auto Number	
		Rental City	Text	
		BHK type	Picklist	
Loan		<b>Field label</b>	<b>Data type</b>	
		Loan Id	Auto generated	
		Interest Rate	Currency	
		Term	Number	
		Annual loan	Number	
		Total Loan Instalments	Number	
		Loan Repayment	Number	
		Loan Amount	Formula	

<b>Lead</b>	<b>Field Label</b>	<b>Data type</b>	
	Lead	Auto Number	
	State	Picklist	
	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.



## Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
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A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*

Viveka

Last Name\*

Rathna

Email\*

viveka181202@gmail.com

Role\*

Developer

Company\*

M.V.Muthiah government arts college for women

Country/Region\*

India

Postal Code\*

624003

Activate Windows

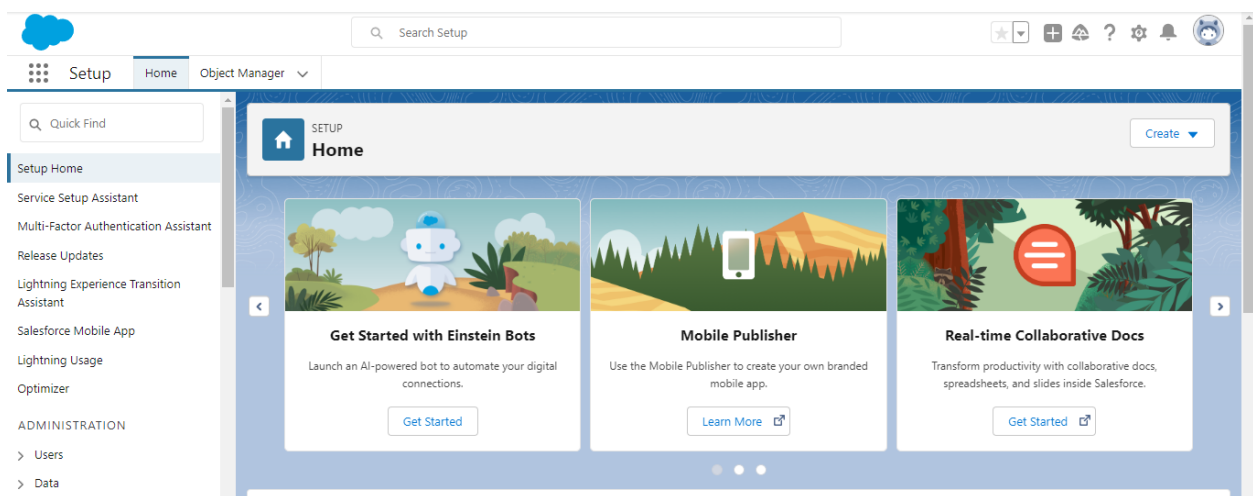
Go to PC settings to activate Windows.

## 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.

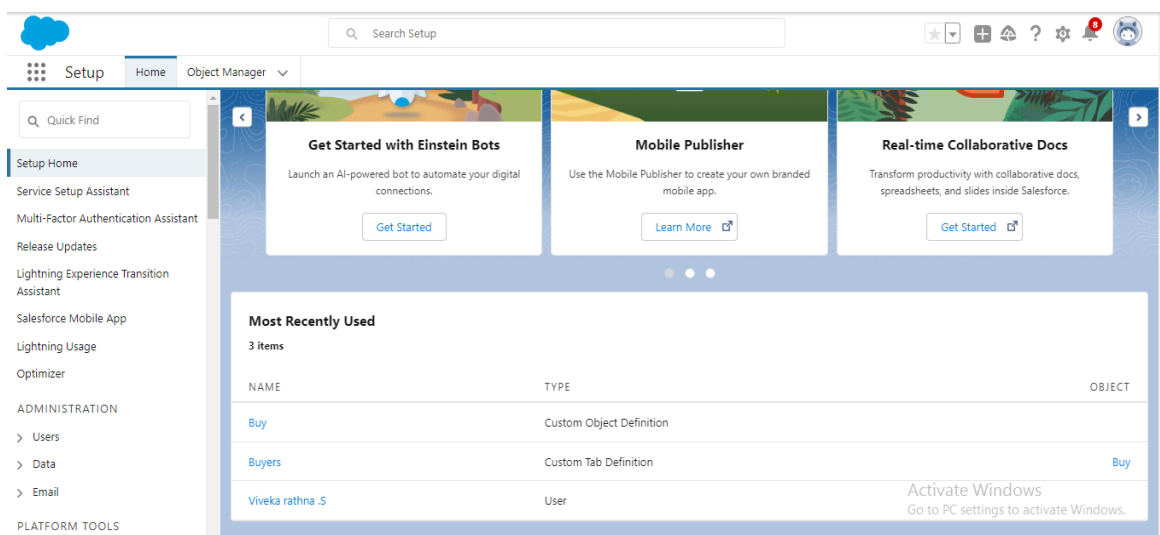
On Custom object defining page:

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

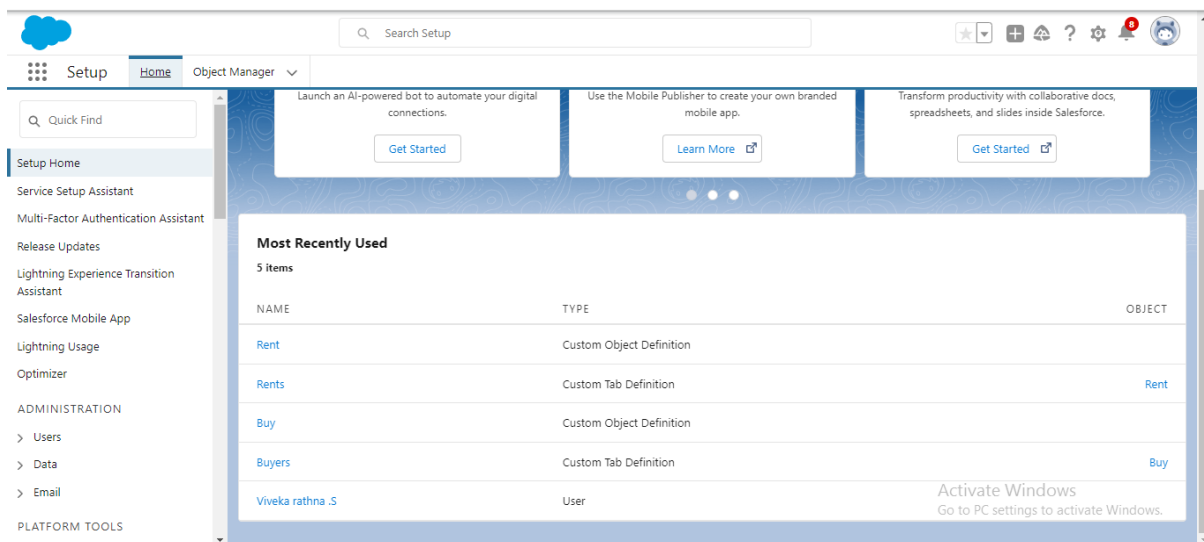




### ACITIVITY 3:

## 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

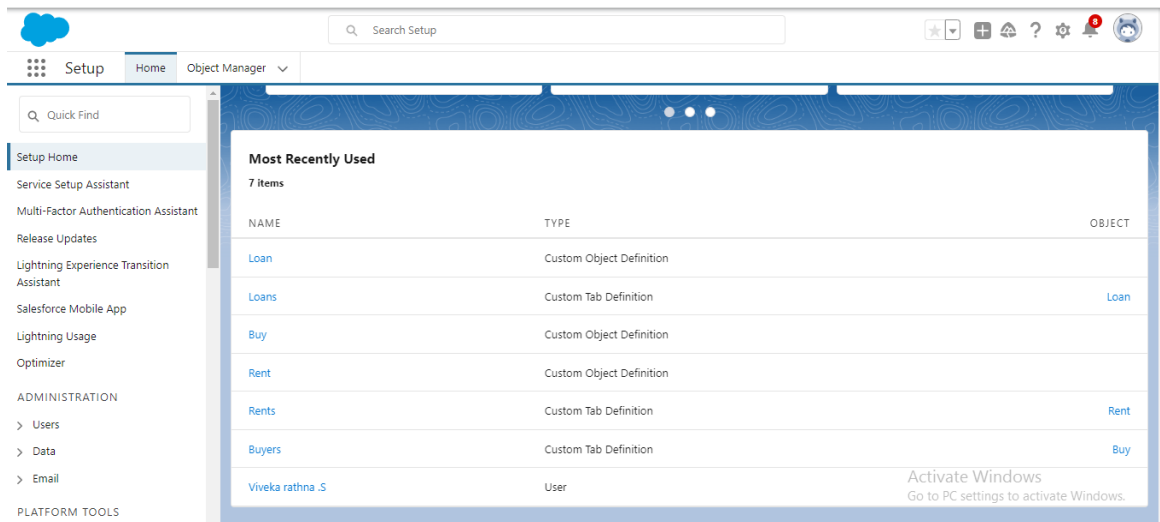


### ACTIVITY : 4

## 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



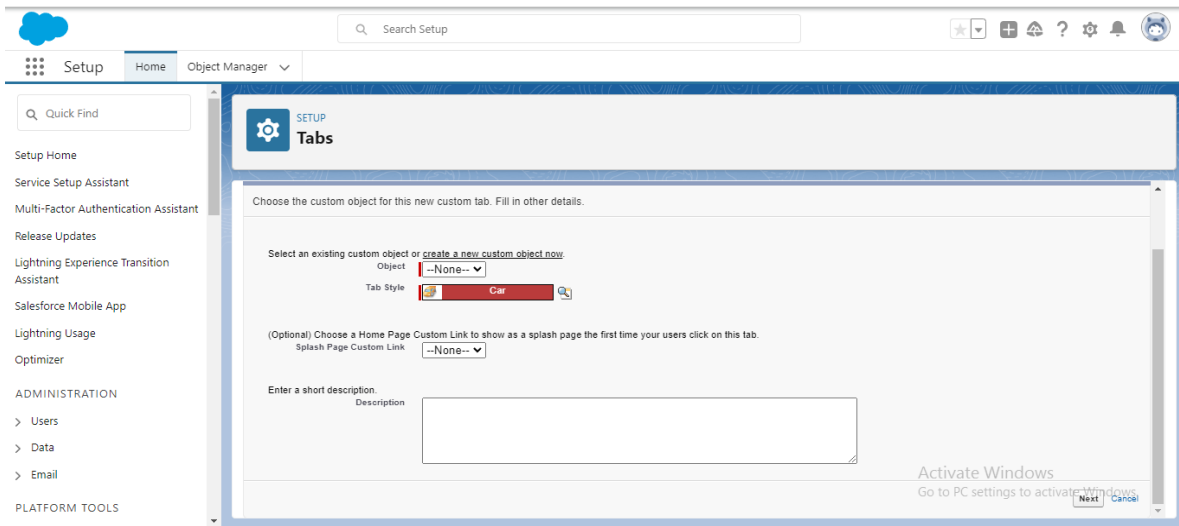
## Milestone 3: Tab

### 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.

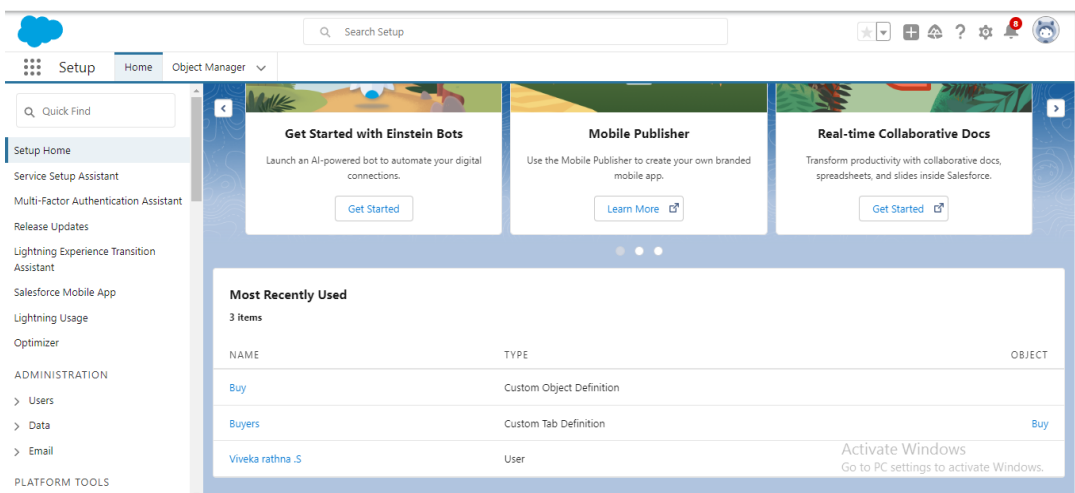


## ACTIVITY 2:

### To create a Tab:(Buy)

### To create a Tab:(Lead)

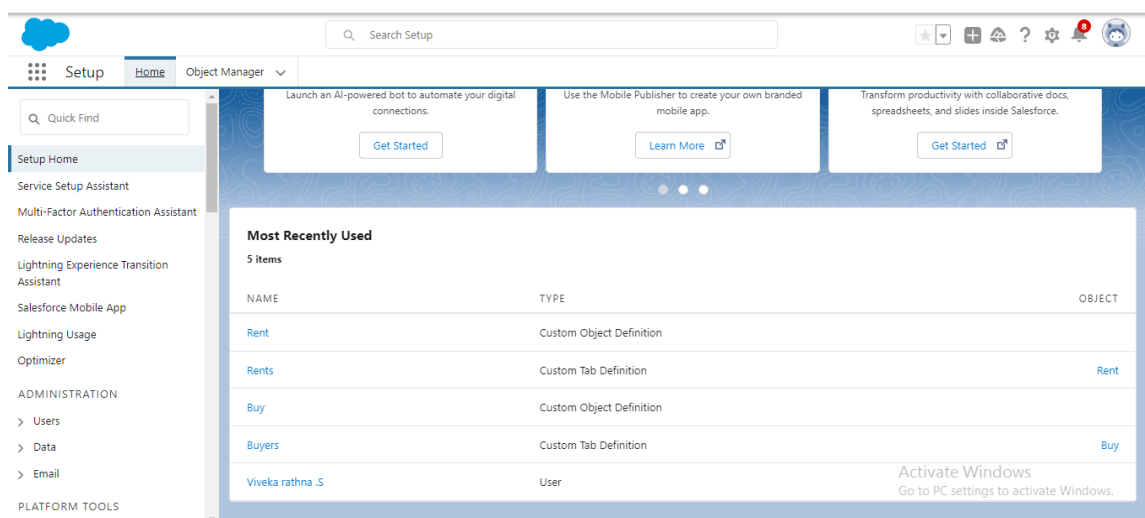
1. Go to setup page then type Tabs in Quick Find bar then click on tabs then New (under custom object tab)
2. Select Object(Buy) then Select the tab style then Next (Add to profiles page) keep it as default then Next (Add to Custom App) keep it as default then Save



### ACTIVITY 3

#### To create a Tab:(Rent)

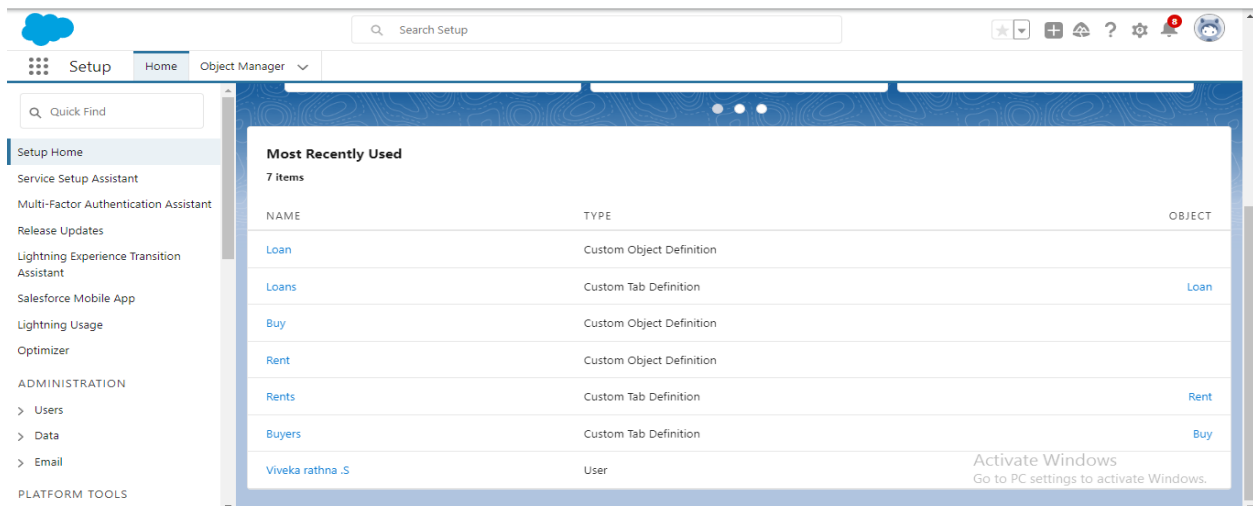
1. Go to setup page then type Tabs in Quick Find bar then click on tabs then New (under custom object tab)
2. Select Object(Rent) then Select the tab style then Next (Add to profiles page) keep it as default then Next (Add to Custom App) keep it as default then Save.



### 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.

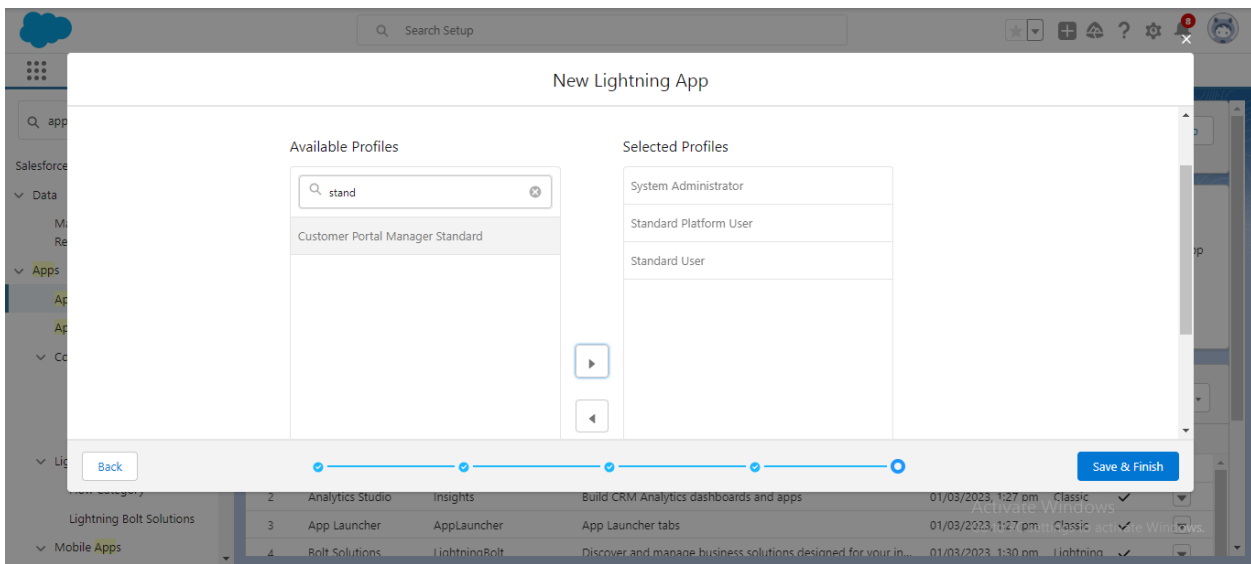


## Milestone 4 - The Lighting App

### ACTIVITY 1:

### 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}

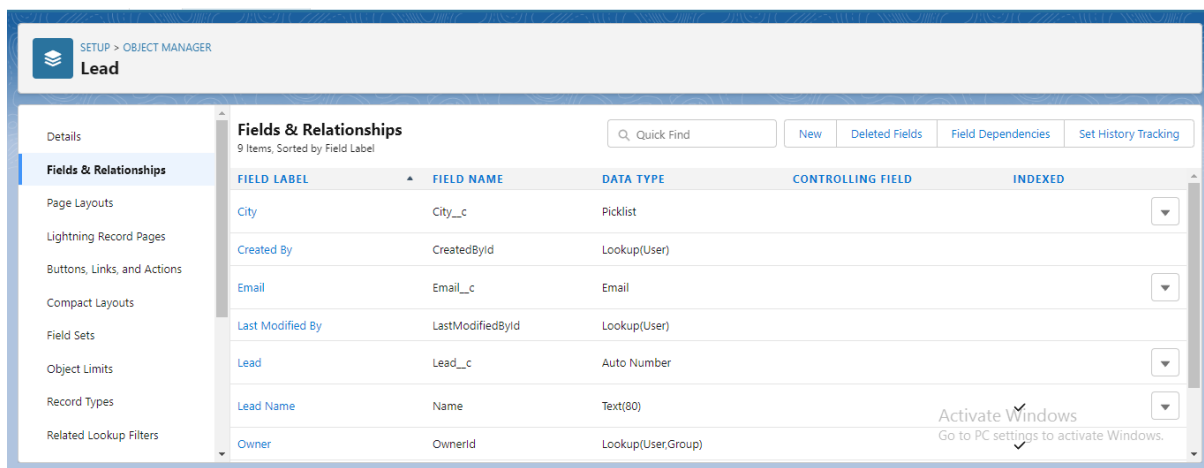
State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

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)

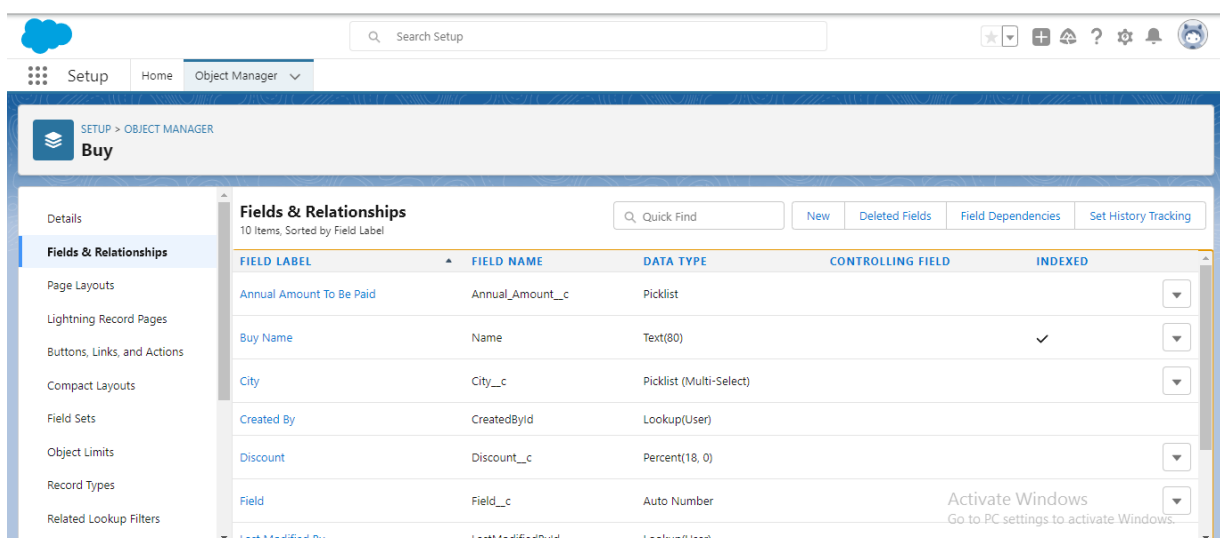
In the Fields and Relationship go to the Field Dependencies



## ACTIVITY 2:

### Create For Object Buy

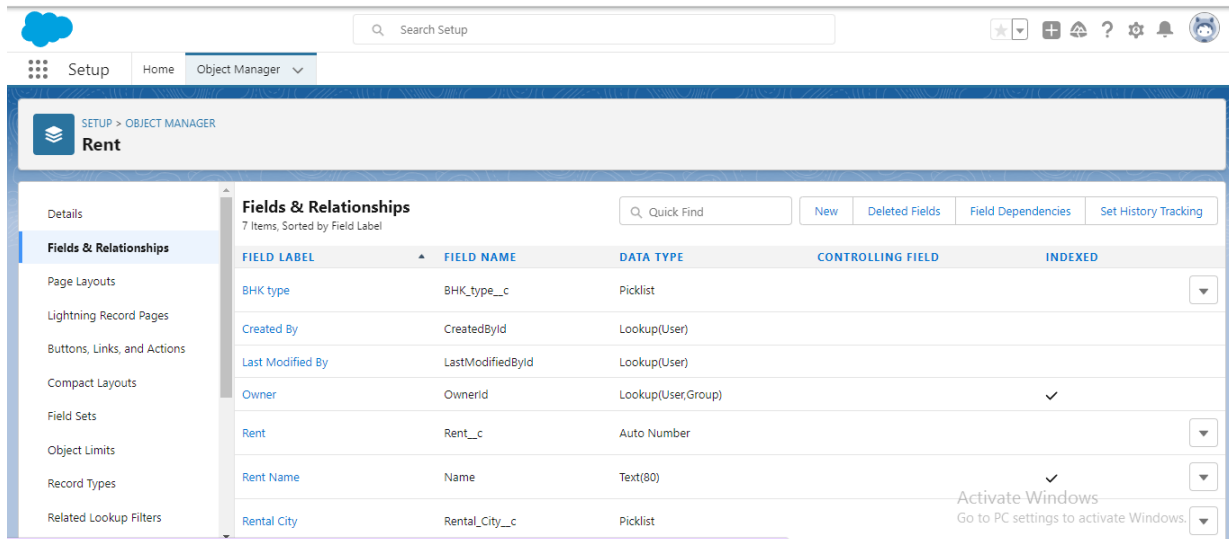
1. Create Field for Buy
2. Create Property Type: (Picklist) (Residential, Commercial, Industrial)
3. Discount:(Percentage As the Field Data Type)
4. State:Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
5. City:(Take Any City for Field Dependency)
6. Annual Amount To Be 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  
$$(\text{Loan\_Repayment\_c} * (((1 + (\text{Interest\_rate\_c} / 52))^{\text{Term\_c}}) - 1)) / (($$



$\text{Interest\_rate\_c} / 52) * ((1 + (\text{Interest\_rate\_c} / 52))^{\text{Term\_c}})$

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

The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Loan' object. The 'Fields & Relationships' tab is selected, displaying a list of 11 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan Id	Loan_Id__c	Auto Number		
Loan Name	Name	Text(80)		

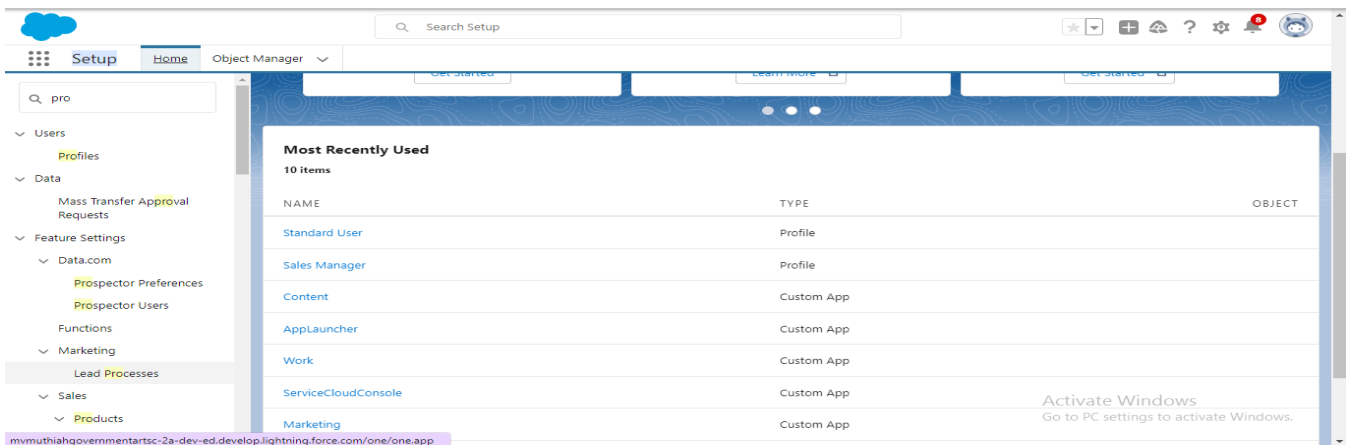
Additional details from the screenshot: The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Fields & Relationships' section has a 'Quick Find' box and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. An 'Activate Windows' watermark is visible in the bottom right corner.

## 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

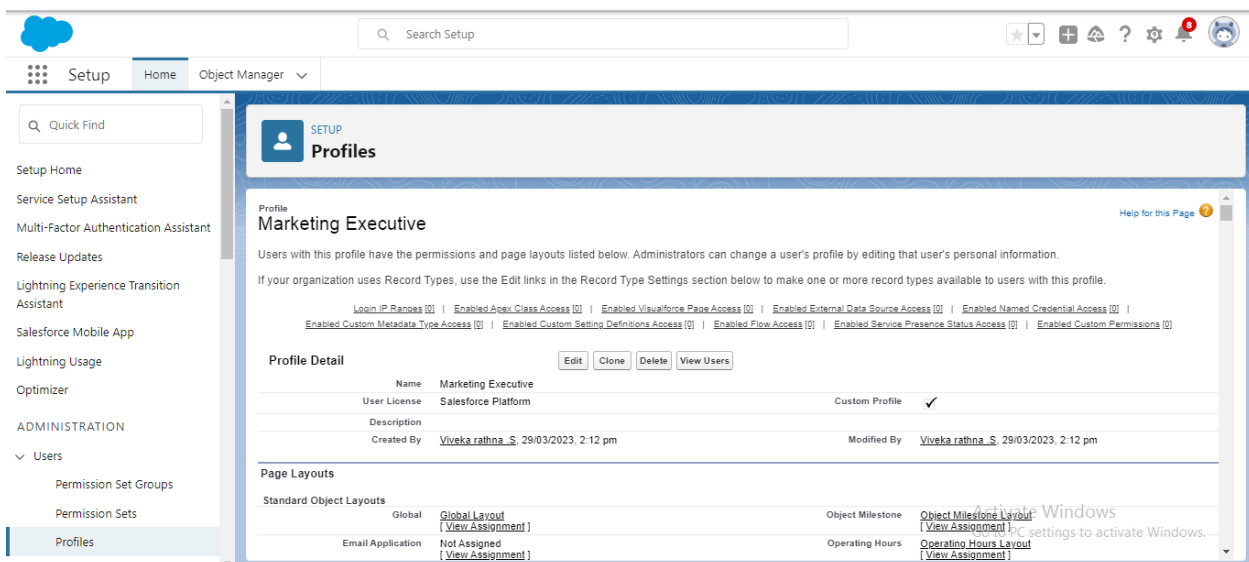


## ACTIVITY 2:

### 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 :

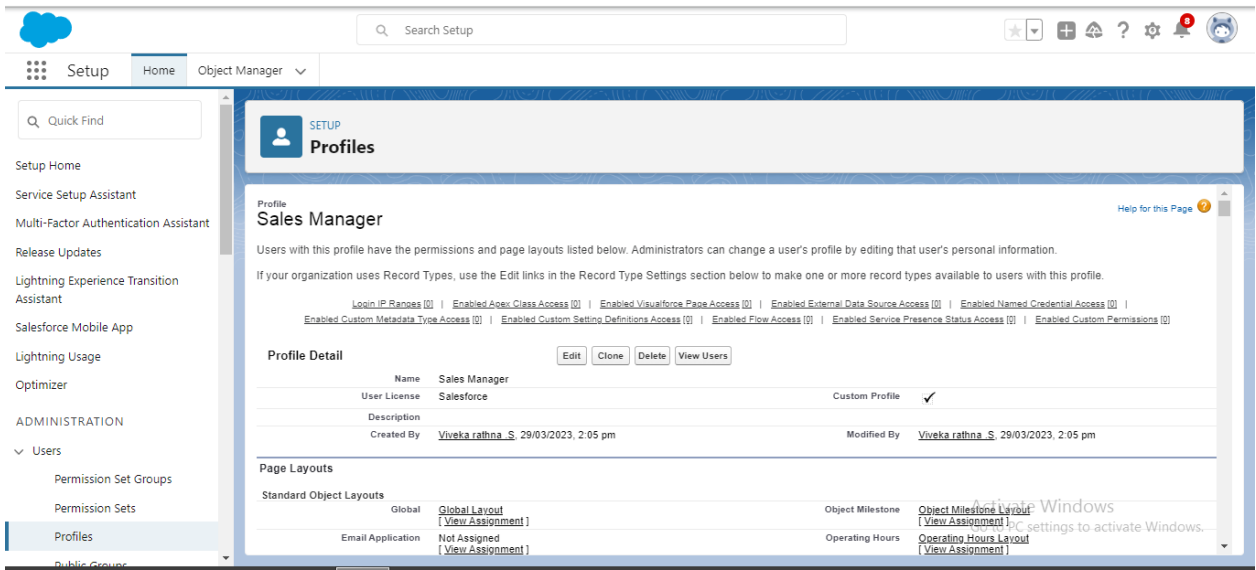
### Sales

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.

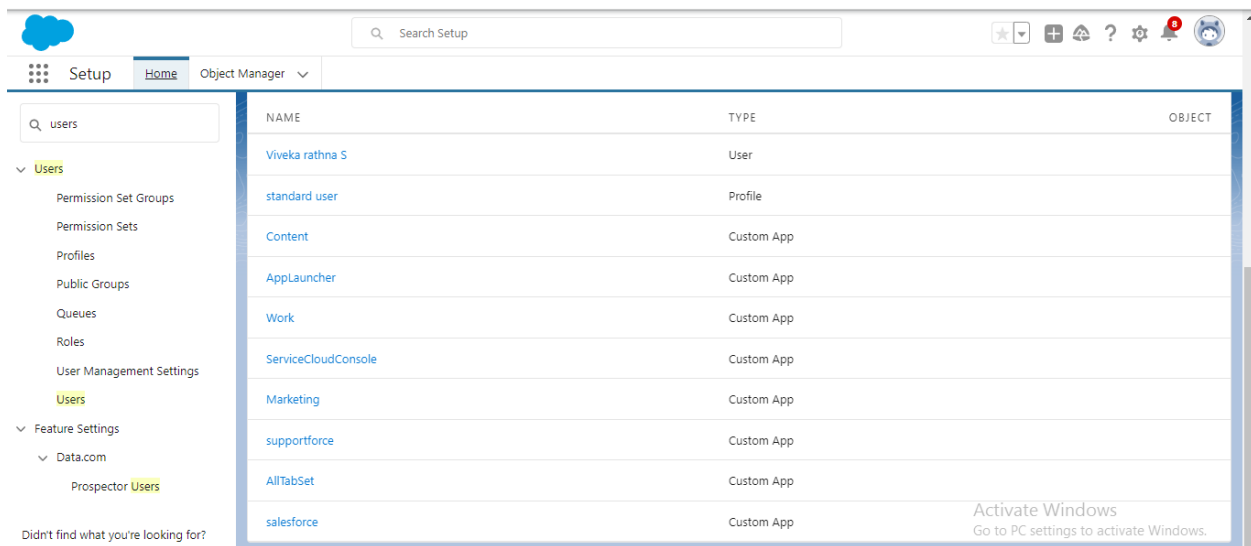


Milestone 7 New User

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.

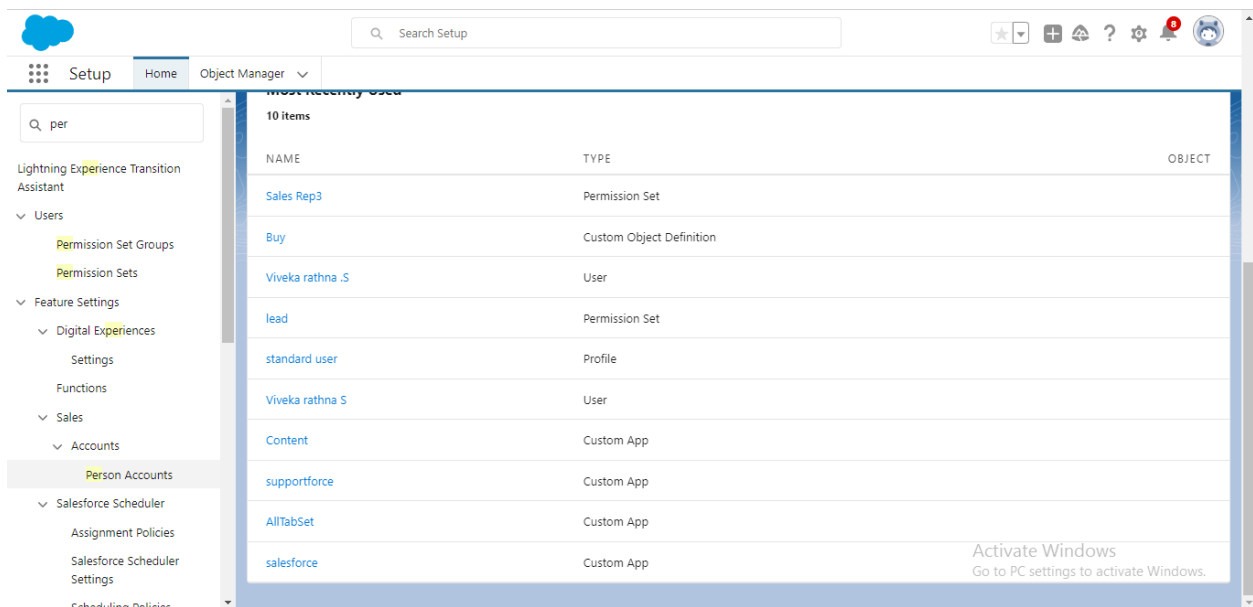
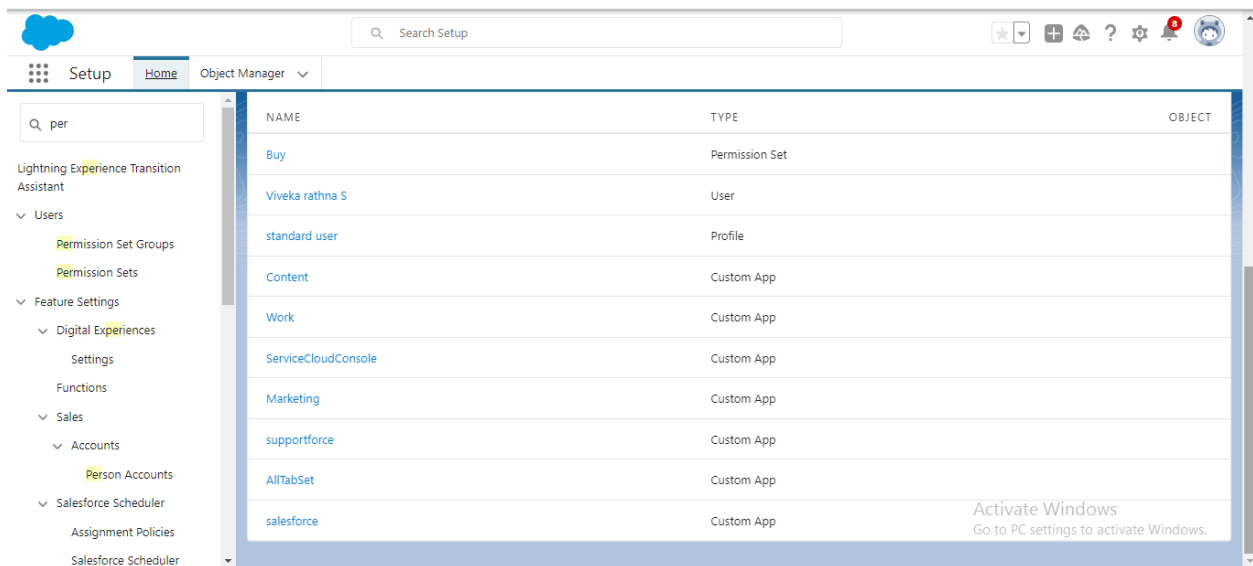


## Milestone 8 - Permission Set

### 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

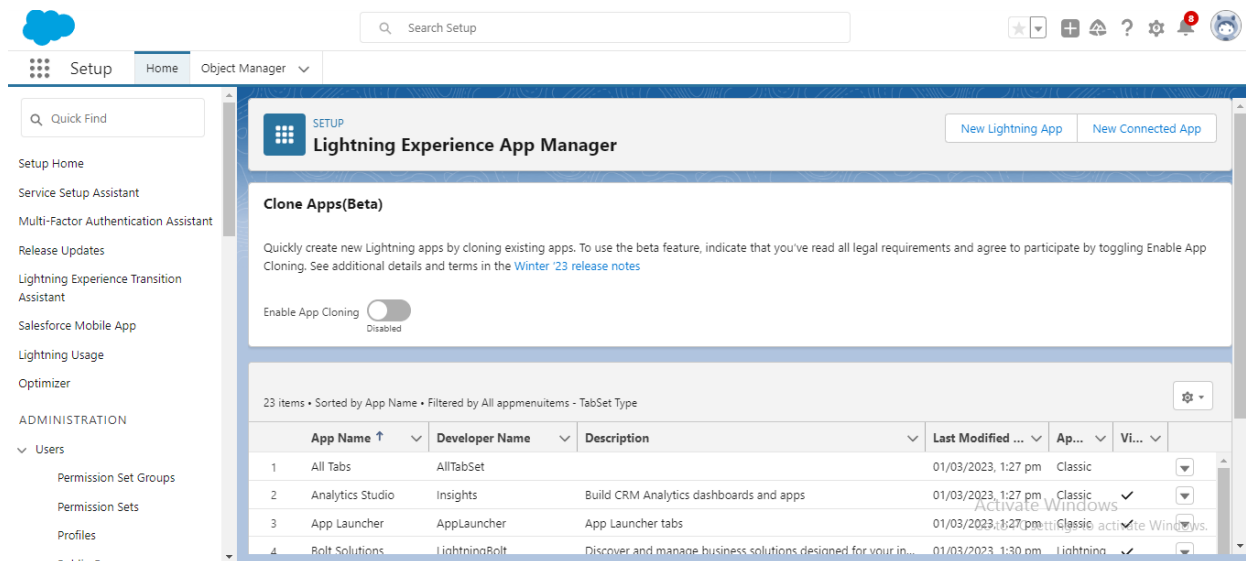
### ACTIVITY 1:

#### 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:

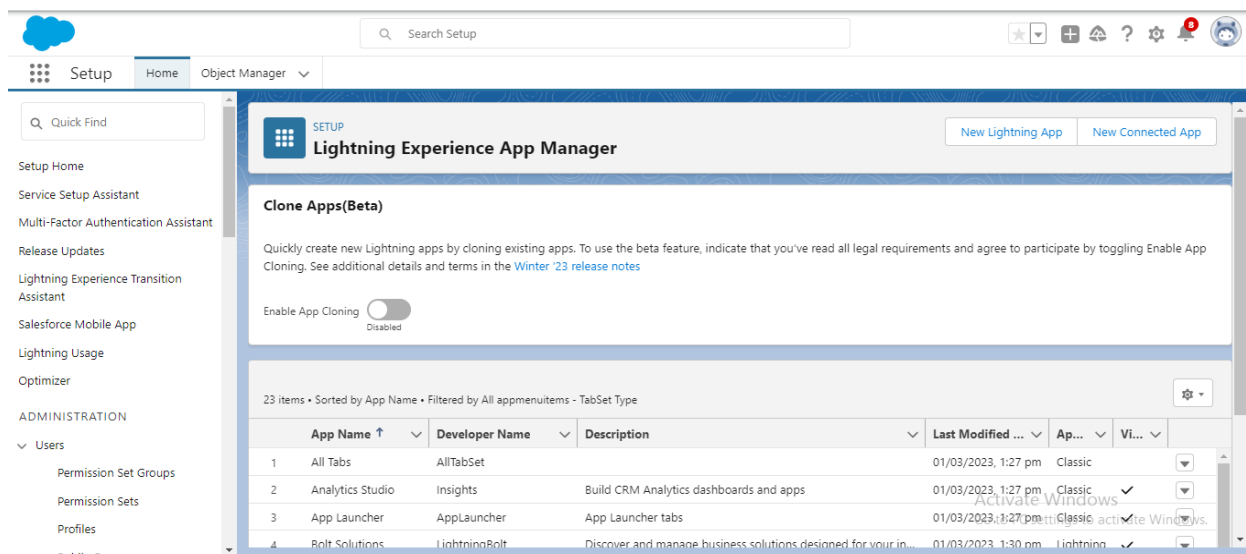
### Marketing & Sales

#### Marketing

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

#### Sales

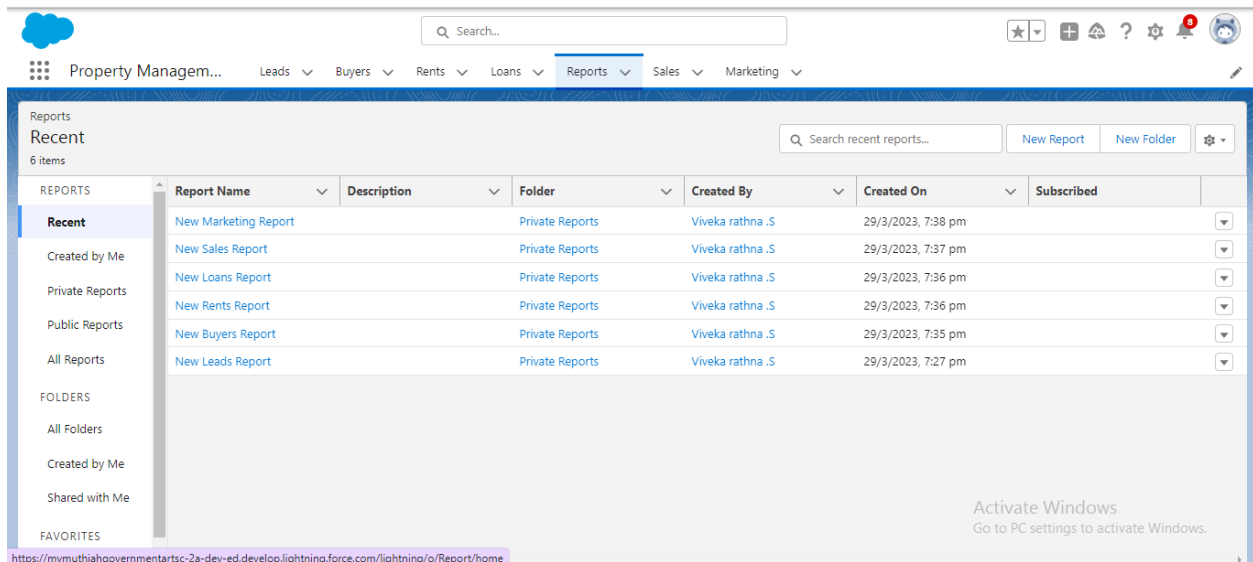
1. Sale Manager OWD is Set As Private similarly sales Rep1, Sales Rep2 same OWD for them



## 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  $\geq$  to 5000\$

The screenshot displays a CRM interface with a top navigation bar containing 'Property Managem...', 'Leads', 'Buyers', 'Rents', 'Loans', 'Reports', 'Sales', and 'Marketing'. A search bar is located in the top right. The main header shows 'Loan' and 'The Total Number of Loan Passed' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The left sidebar lists loan details: Loan Name, Loan Id (LN-0003), Interest Rate (₹45), Term (8), Annual Loan (5,000), Total Loan Instalments (8), Loan Repayment (4,000), Loan Amount (₹4,590.69), and Created By (Viveka rathna). The right sidebar shows the Owner (Viveka rathna) and Last Modified By (Viveka rathna) information. A large blue area on the right contains the text 'Activate Windows Go to PC settings to activate Windows.'


## 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





Property Managem...
Leads
Buyers
Rents
Loans
Reports
Sales
Marketing
Lead with loan amount
New Lead with Loan Report

### New Lead with loan amount Report

Lead with loan amount: Lead Name ↑
gayathri
Keerthana
sowmiya
viveka

View Report (New Lead with loan amount Report)

### The Total Number of Loan Passed

Loan: Loan Name ↑
Bank
Personal Loan
The Total Number of Loan Passed

View Report (The Total Number of Loan Passed)

### New Loans Report

Loan: Loan Name ↑
Bank
Personal Loan
The Total Number of Loan Passed

View Report (New Loans Report)

### New Marketing Report

Marketing: Marketing Name ↑
Food products
Home appaents

View Report (New Marketing Report)

### New Sales Report

Sales: Sales Name ↑
Furnitures
watercans

View Report (New Sales Report)

### New Rents Report

Rent: Rent Name ↑
SAIRAM ILLAM
Sowmiya


View Report (New Rents Report)

Activate Windows  
Go to PC settings to activate Windows.

## 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



Property Managem...
Leads
Buyers
Rents
Loans
Reports
Sales
Marketing
Lead with loan amount
Dashboards

**Marketing**

Refresh Edit Subscribe

As of 31-Mar-2023, 1:39 pm Viewing as Viveka rathna .S

### New Marketing Report

Marketing: Marketing Name ↑
Food products
Home appaents

View Report (New Marketing Report)

### New Sales Report

Sales: Sales Name ↑
Furnitures
watercans

View Report (New Sales Report)

### New Buyers Report

Buy: Buy Name ↑
Phone
Television
Washing Machine

View Report (New Buyers Report)

### New Leads Report

Firs--	Las--	Title	Comp--	Email
sow miya	s	property managem ent	mvm	santhi09051981

View Report (New Leads Report)

Activate Windows  
Go to PC settings to activate Windows.

## 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.