



PROPERTY MANAGEMENT APPLICATION USING SALESFORCE



A Review of Property Management Application Using Salesforce

Submitted by
V.VAISHNAVI (20321ER061)
T.VIJAYALAKSHMI (20321ER062)
S.VIVEKA RATHNA (20321ER063)
P.YOGA LAKSHMI (20321ER064)
M.YUVARANJANI (20321ER065)

Under the guidance
of
Mrs. S.DAISY, M.Sc., M.Phil
Guest Lecturer
PG and Research Department of Mathematics.

**M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR
WOMEN**
(Affiliated To Mother Teresa Women's University,
Kodaikanal)
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624001.



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

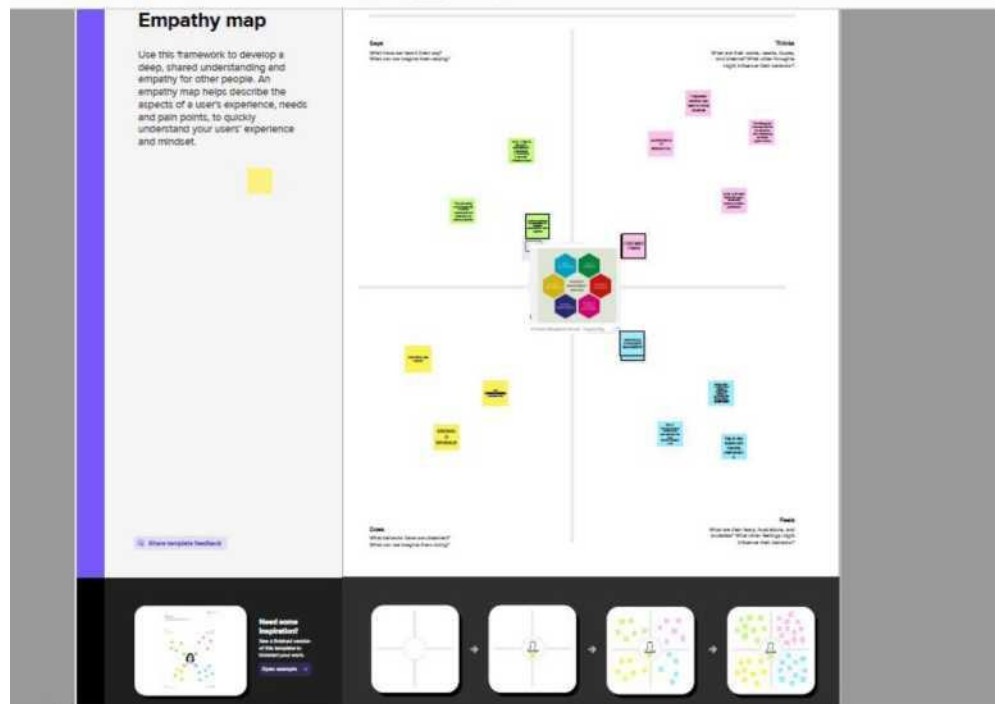
1.2 Purpose :

What you will learn in this section

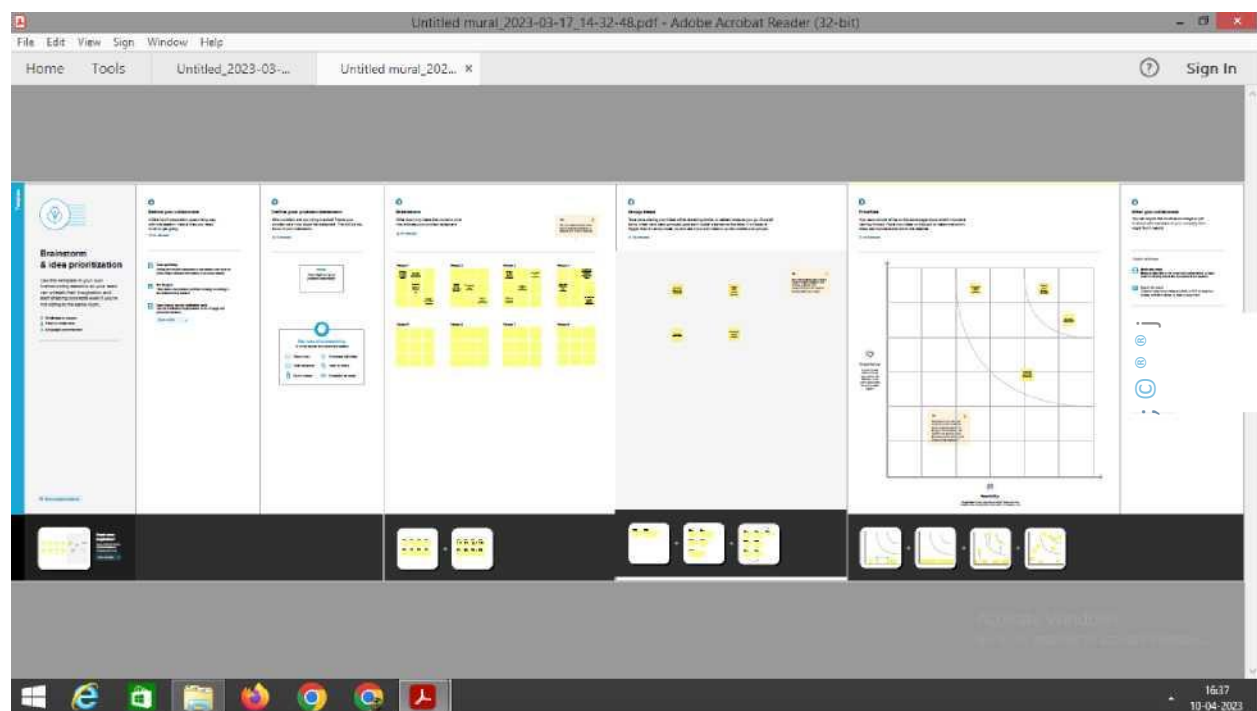
- 1. Real Time Salesforce Project**
- 2. Object & Relationship in Salesforce**

2 Problem Definition and Design Thinking

2.2 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

Object name	Field in the object	
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

Object Name		Fields in the object	
Loan	Field label	Data type	
	Loan Id	Auto number	
	Interest rate	Currency	
	Term	Number	
	Annual Loan	Number	
	Total loan repayments	Number	
	Loan repayments	Number	
	Loan amount	Formula	
Lead	Field label	Data type	
	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 companyThis 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

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First Name*
Viveka

Last Name*
Rathna

Email*
ulvekal81202@gmail.com

Role*
Developer

Company*
M.V.Muthiah government arts college for women

Country/Region*
India

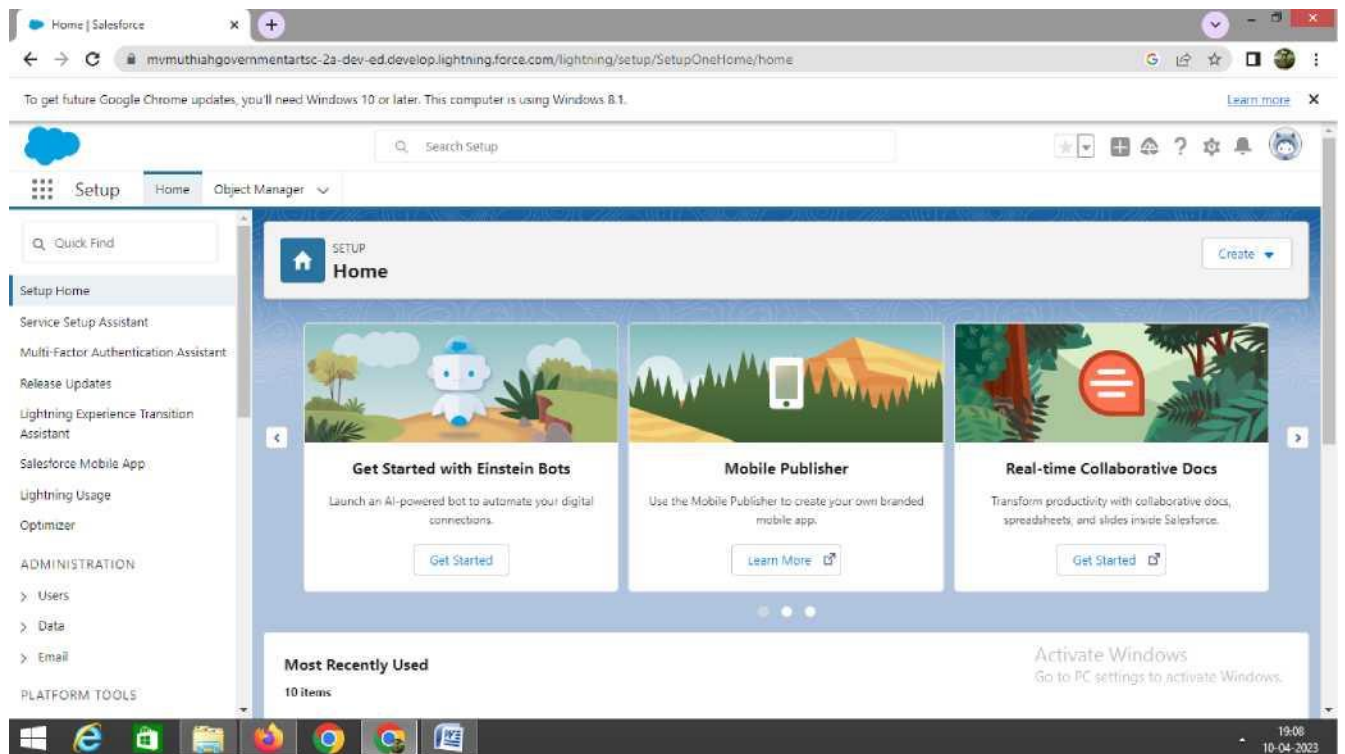
Postal Code*
524003

Activate Windows
Go to PC settings to activate

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 account. The email may take 5-10mins
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.

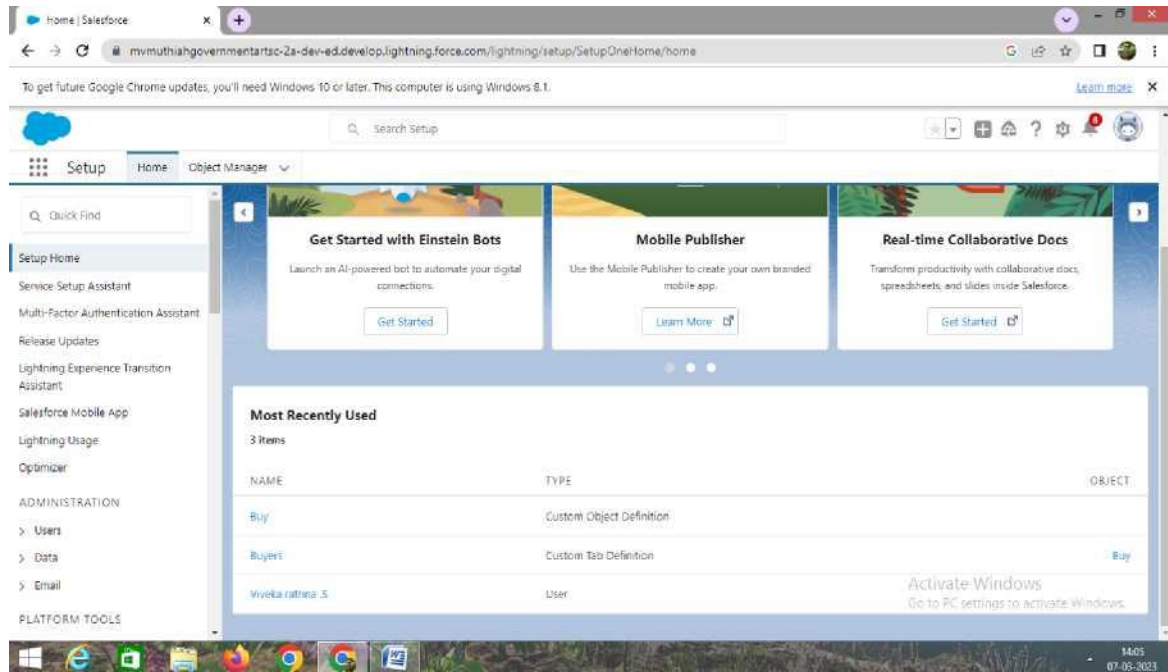
On Custom object defining page:

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

ACTIVITY 2:

Create Object Buy

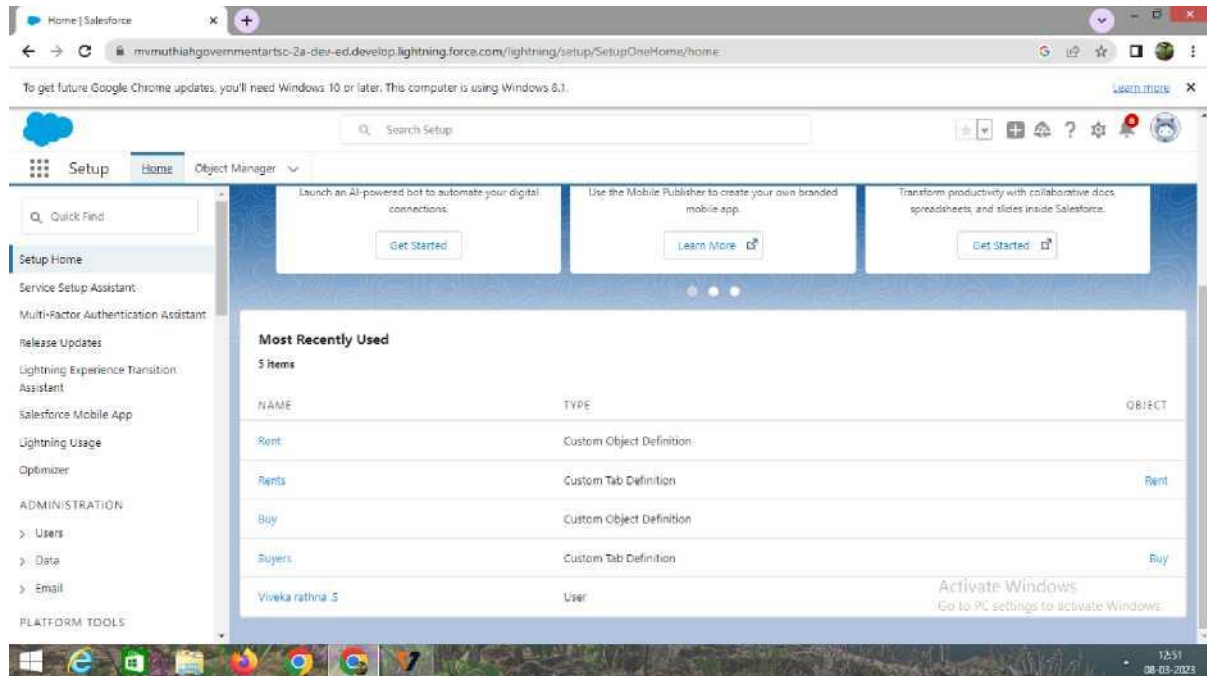
1. To create an object:
2. From the setup page then Click on Object Manager then Click on Create then Click on Custom Object.
3. Enter the label name then Buy
4. plural label name then Buyers
5. click on Allow reports,
6. Allow search then Save



ACITIVITY 3:

Create Object Rent

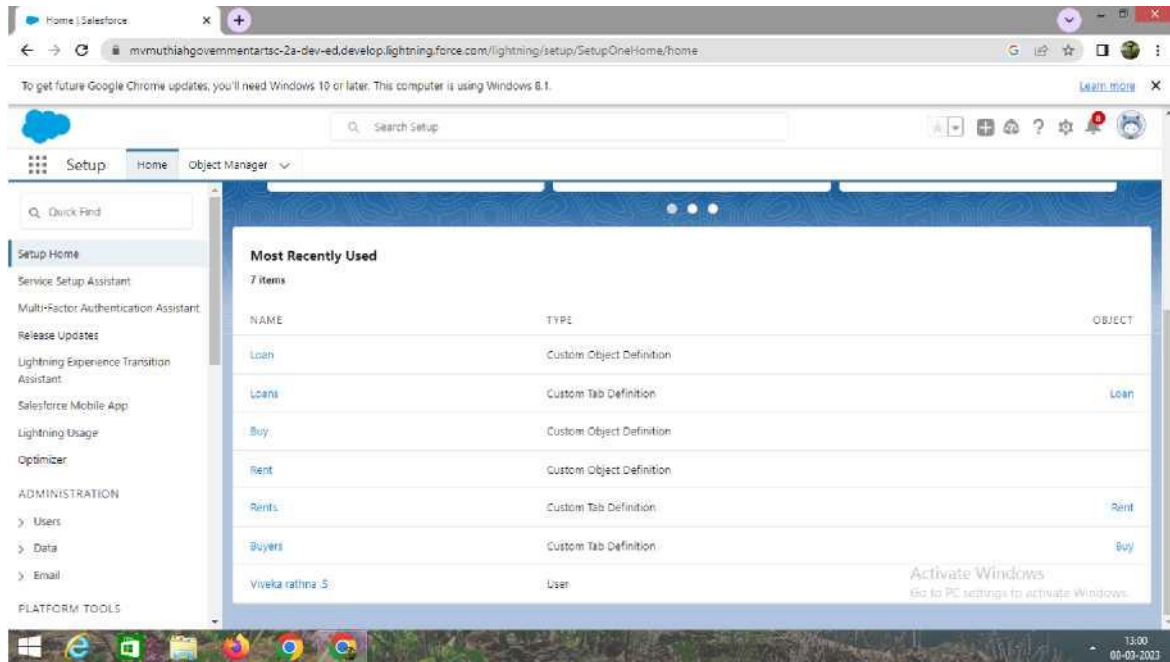
1. To create an object:
2. From the setup page then Click on Object Manager then Click on Create then Click on Custom Object.
3. Enter the label name then Rent
4. plural label name then Rents
5. click on Allow reports,
6. Allow search then Save



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



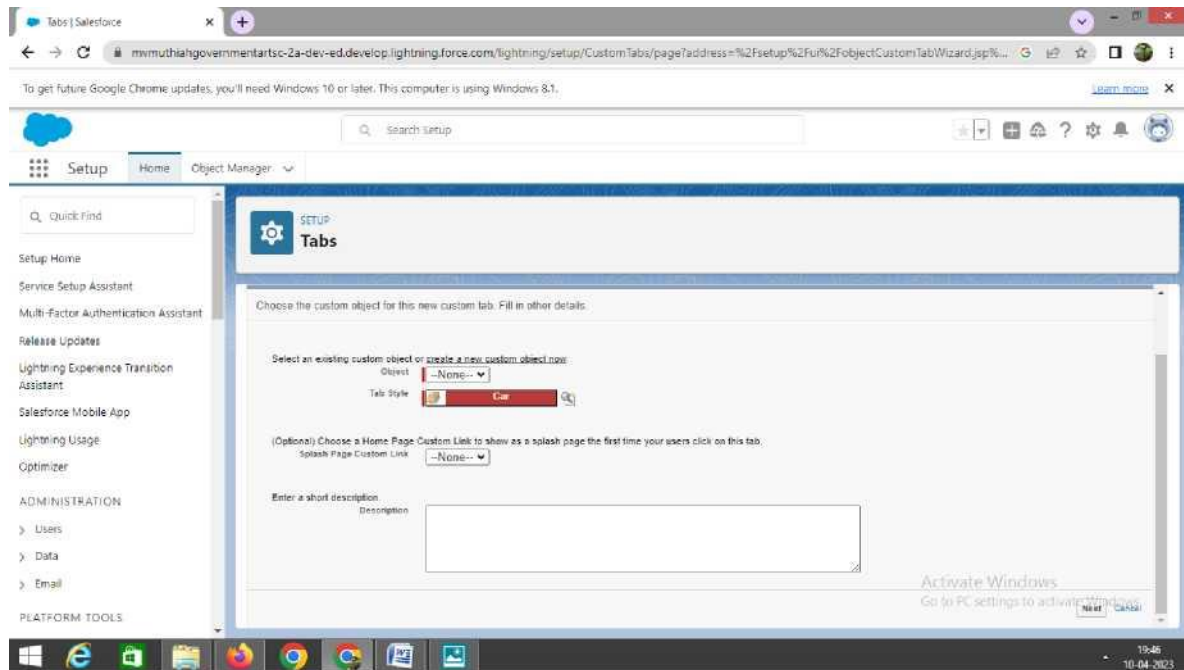
Milestone 3: Tab

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.

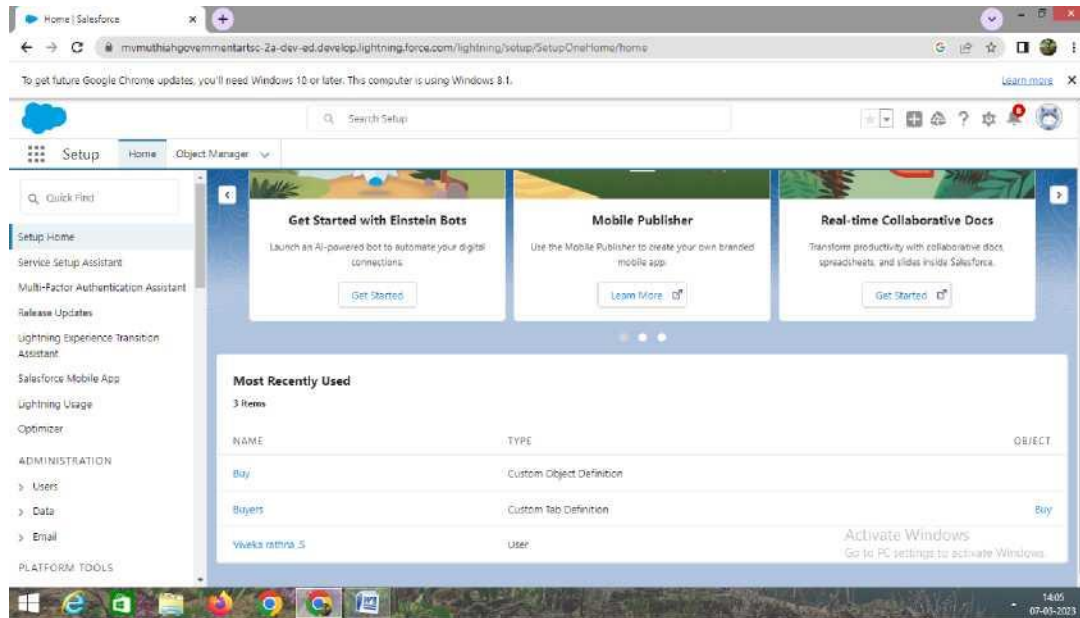


ACTIVITY 2:

To create a Tab:(Buy)

To create a Tab:(Lead)

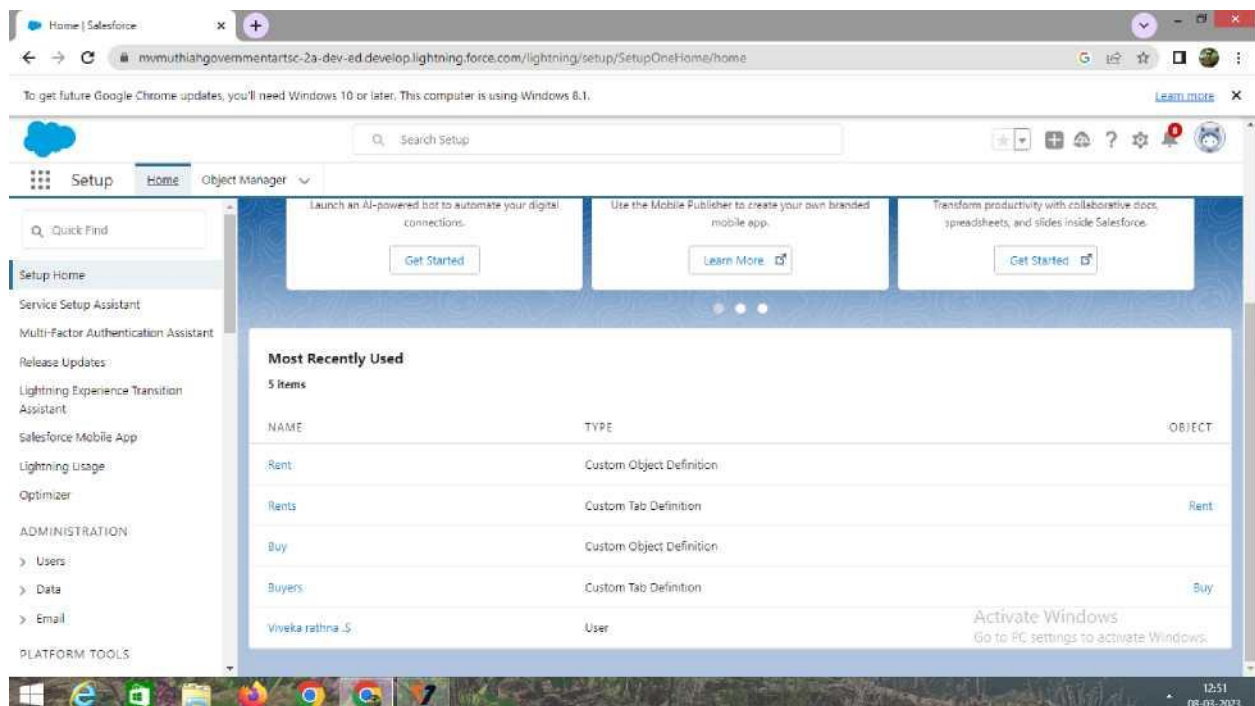
1. Go to setup page then type Tabs in Quick Find bar then click on tabs then New (under custom object tab)
2. Select Object(Buy) then Select the tab style then Next (Add to profiles page) keep it as default then Next (Add to Custom App) keep it as default then Save



ACTIVITY 3

To create a Tab:(Rent)

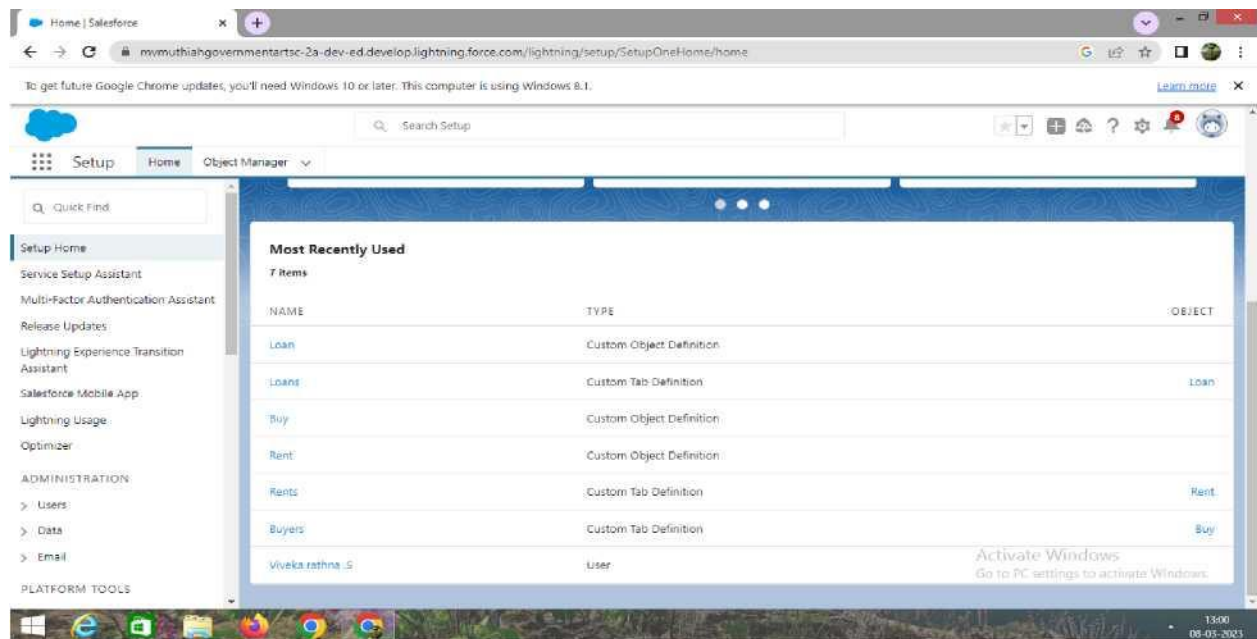
1. Go to setup page then type Tabs in Quick Find bar then click on tabs then New (under custom object tab)
2. Select Object(Rent) then Select the tab style then Next (Add to profiles page) keep it as default then Next (Add to Custom App) keep it as default then Save.



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

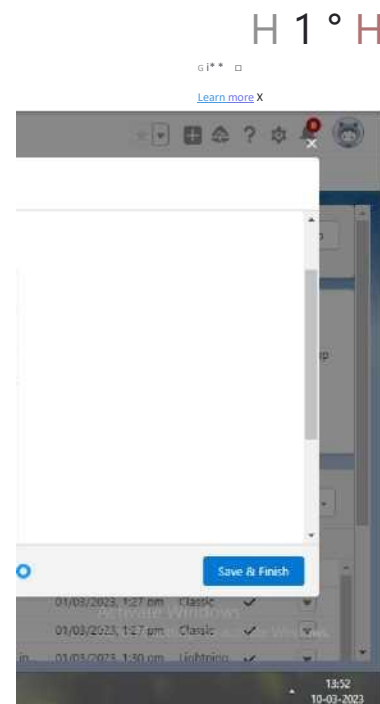
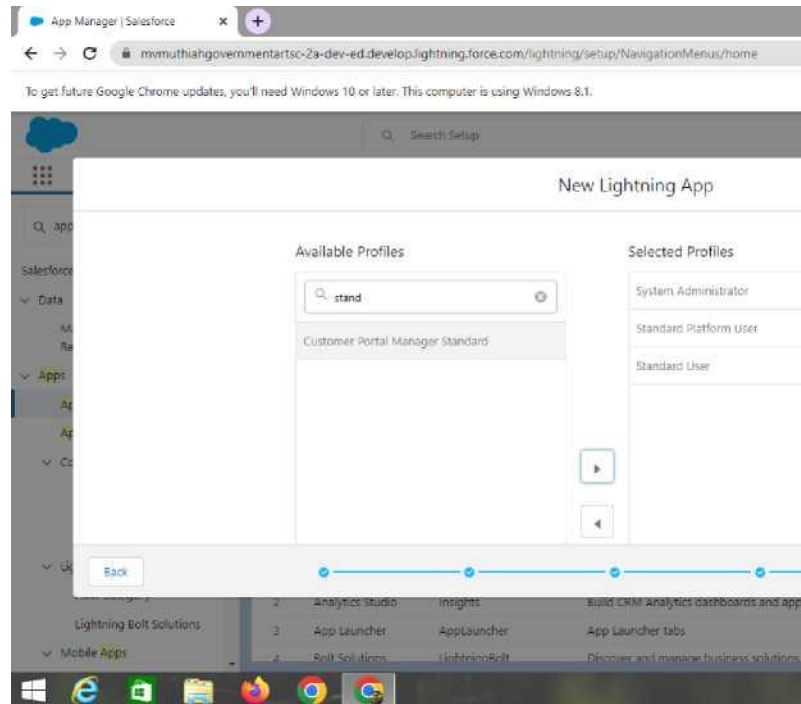
3. (Utility Items) keep it as default then Next then(Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) then Next then (Add User Profile) Add System Administrator, Salesforce platform user, Standard User then Next.

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}

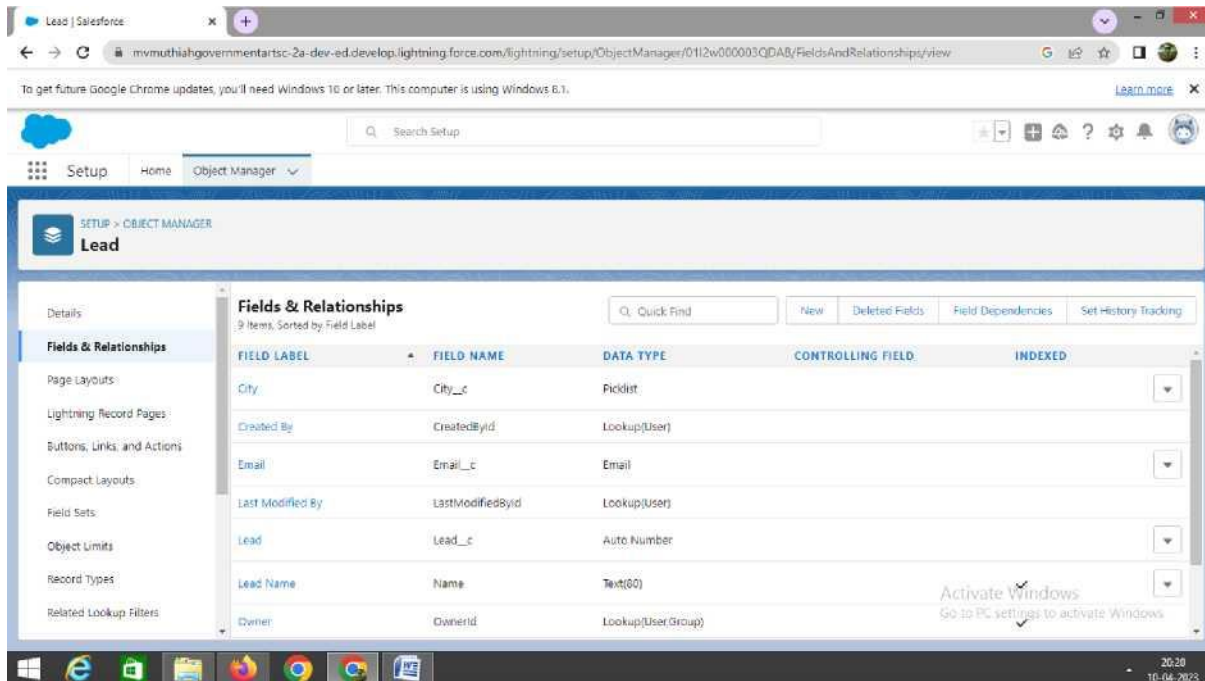
State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

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)

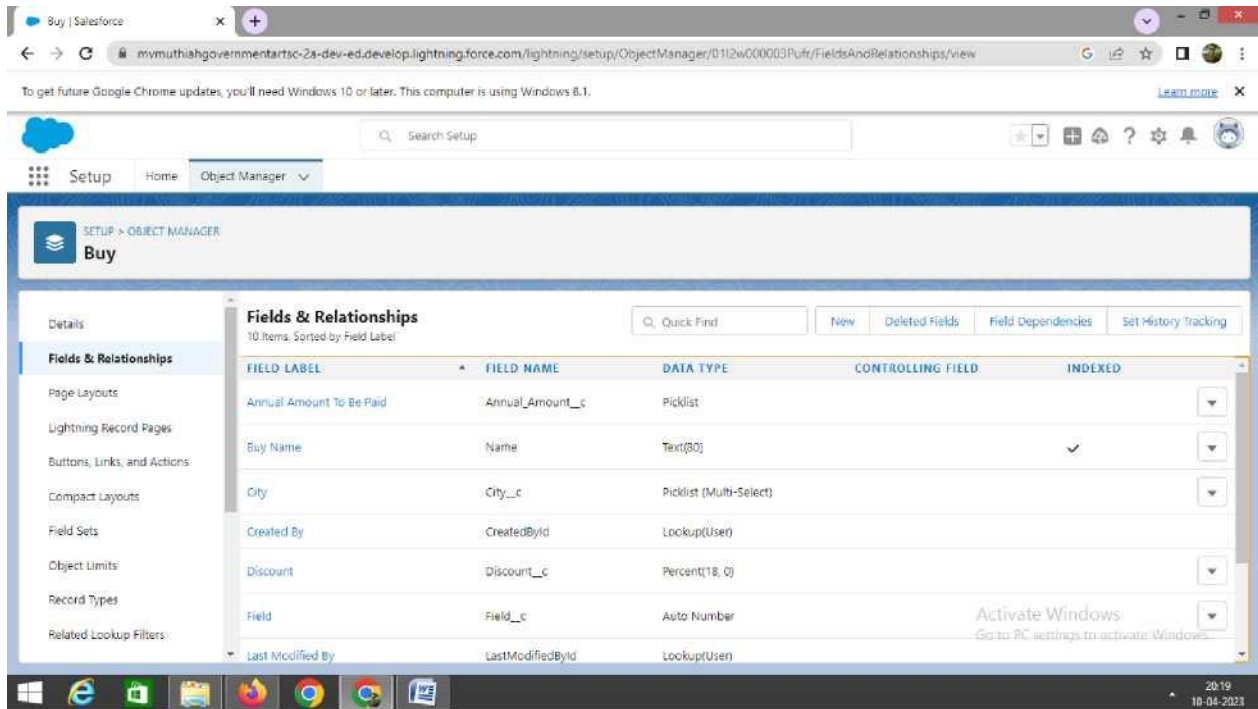
In the Fields and Relationship go to the Field Dependencies



ACTIVITY 2: FOR OBJECT BUY

Create For Object Buy

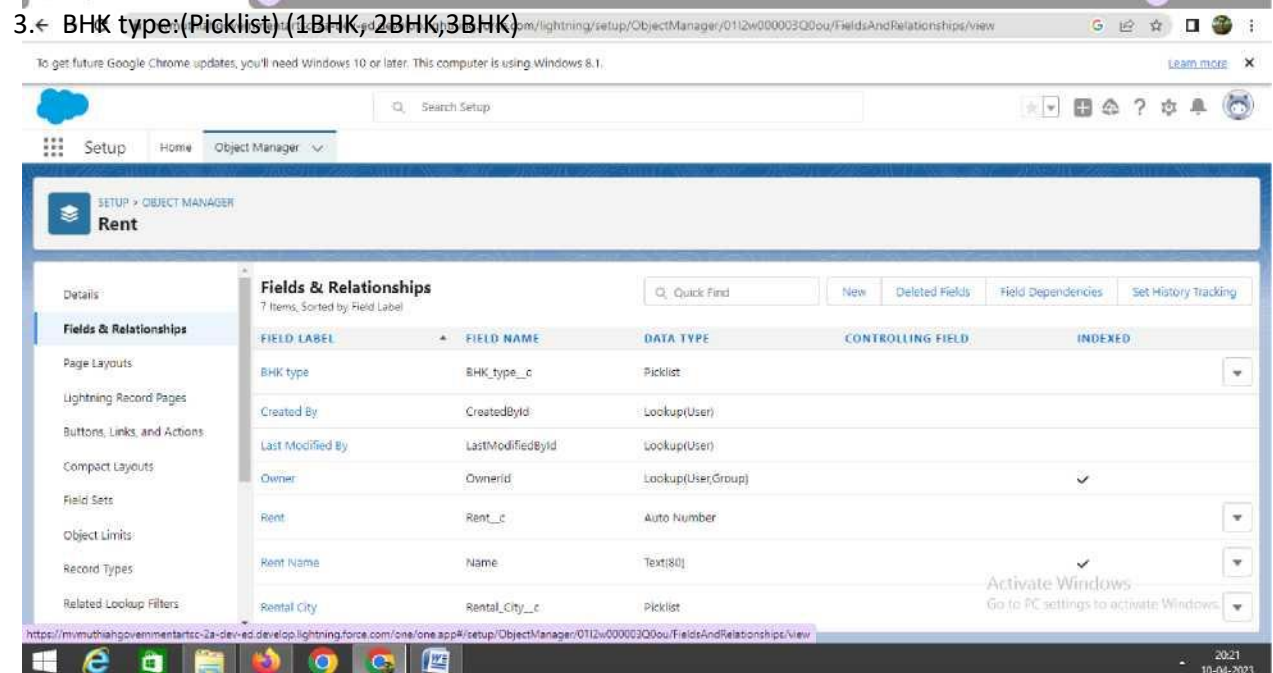
1. Create Field for Buy
2. Create Property Type: (Picklist) (Residential, Commercial, Industrial)
3. Discount:(Percentage As the Field Data Type)
4. State:Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)
5. City:(Take Any City for Field Dependency)
6. Annual Amount To Be 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)



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 for the 'Loan' object. The 'Fields & Relationships' section is active, 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)		

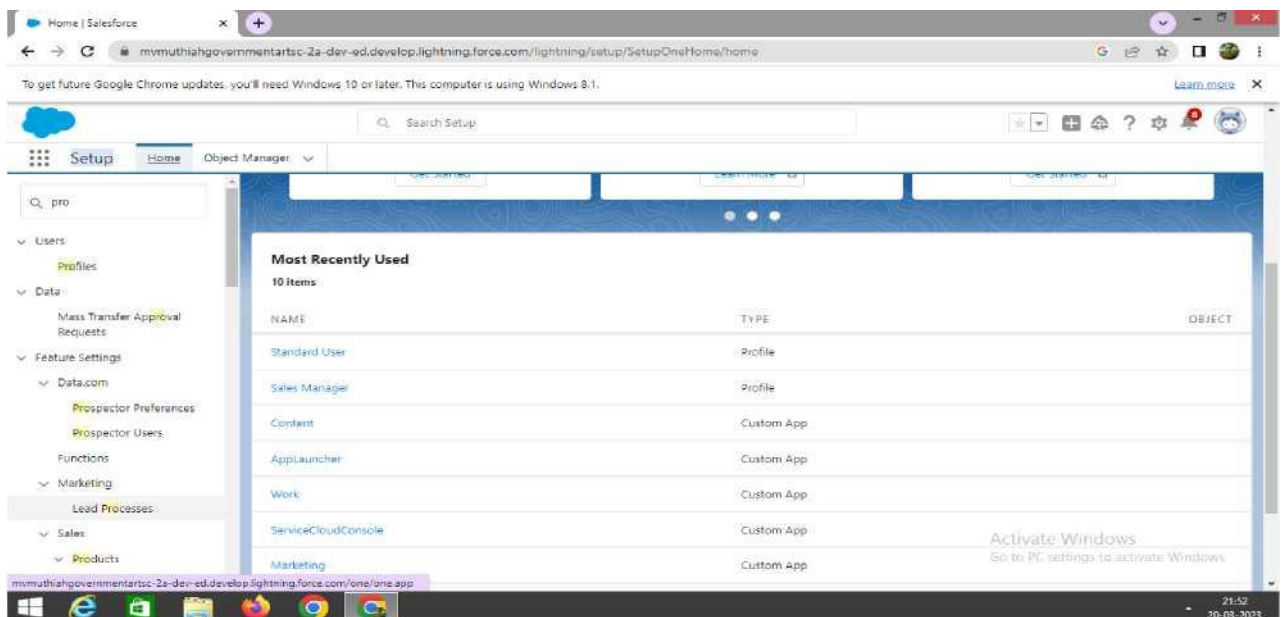
The interface also includes a search bar, navigation tabs (Setup, Home, Object Manager), and a sidebar with various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The bottom of the screen shows the Windows taskbar with the date 2021-10-04-2023.

Milestone 6: Profile

ACTIVITY 1:

To create a new profile

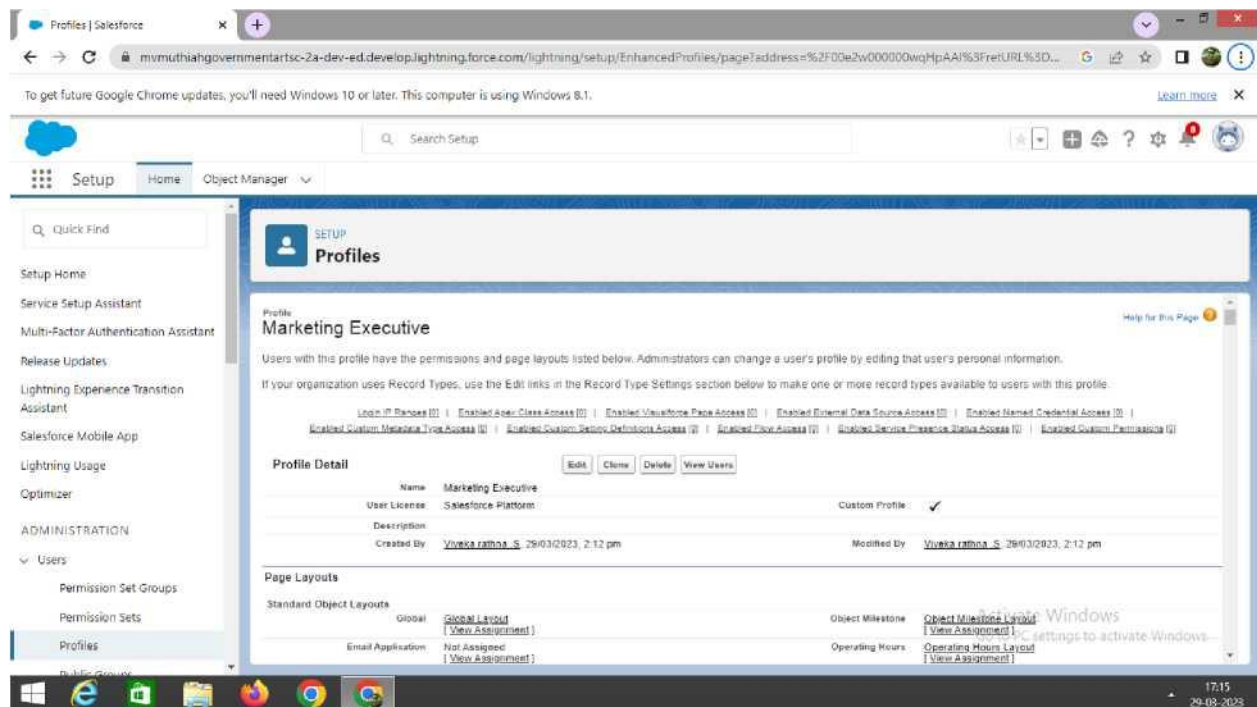
1. Go to setup then type profiles in quick find box then click on profiles then clone the desired profile (standard user is preferable) then enter profile name then save
2. .Enter a Profile Name
3. Click on the new created profile
4. While still on the profile page, then click Edit.
5. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile
6. Sales Manager then Standard user Profile , Marketing Executive1 and Executive2 then Standard Platform User, Marketing Manager then Standard Platform User For



ACTIVITY 2

Marketing

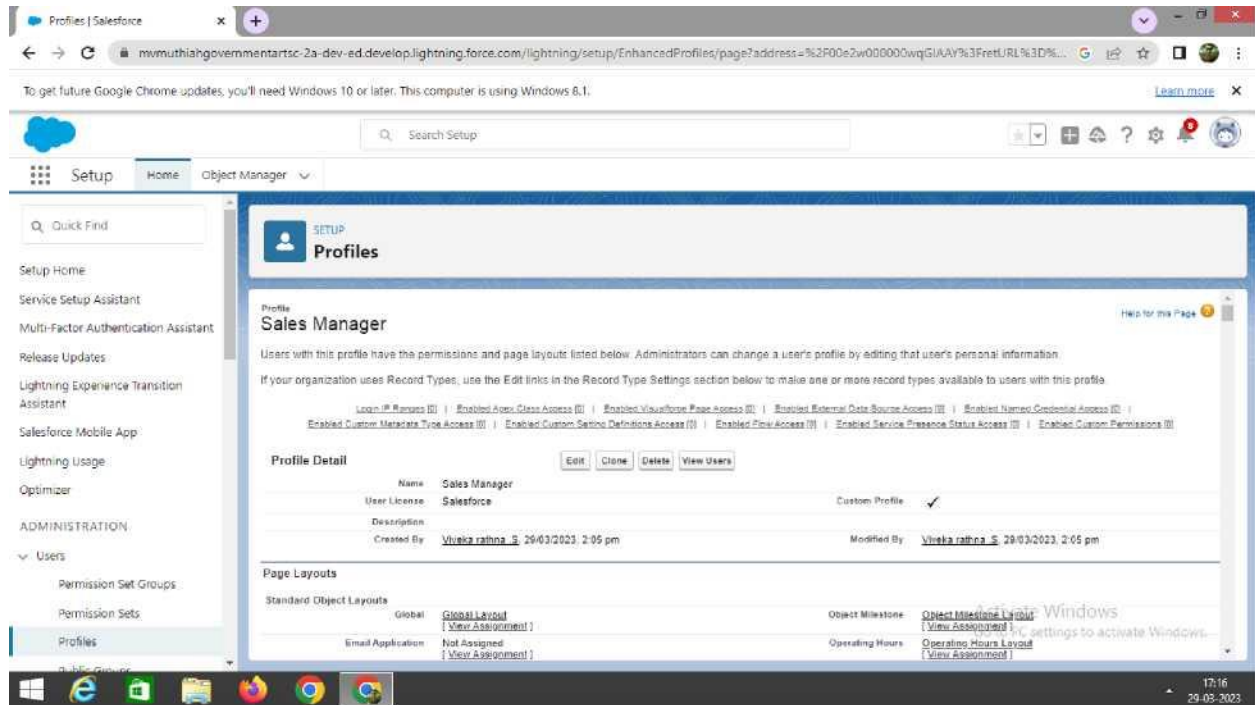
1. Then In The Profile Level Give Read and Create Access to Marketing Executive and Read, Create, Edit, Delete for the Marketing manager
2. Marketing Manager Should Have Access to Marketing Executive



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.

To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 8.1.

[Learn more](#) X

Search Setup

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*** Setup Home Object Manager

Q, users x Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings v Data.com

Prospector Users

Didn't find what you're looking for?

NAME	TYPE	OBJECT
Viveka rathna S	User	
standard user	Profile	
Content	Custom App	
App Launcher	Custom App	
Work	Custom App	
ServiceCloudConsole	Custom App	
Marketing	Custom App	
supportforce	Custom App	
AltTabSet	Custom App	
salesforce	Custom App	

Activate Windows
_Go to PC settings to activate Windows. |

<https://mvmuthiahgovernmentsc-2a-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000GTOqV%3FnoRedirect%3D1%26isUserEntityOverride%3D1>

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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

Setup Home Object Manager

Lightning Experience Transition Assistant

v Users

Permission Set Groups

Permission Sets v Feature

Settings

v Digital Experiences Settings

Functions v sales v Accounts

Person Accounts v

Salesforce Scheduler Assignment

Policies

NAME	TYPE	OBJECT
Buy	Permission Set	
Viveka rathna S	User	
standard user	Profile	
Content	Custom App	
Work	Custom App	
ServiceCloudConsole	Custom App	
Marketing	Custom App	
supportforce	Custom App	
AllTabSet	Custom App	
salesforce	Custom App	

Activate Windows
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+ 20.09.2022

Home | Salesforce

mvmuthiahgovernmentartsc-2a-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home Object Manager

per

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

Scheduling Policies

10 items

NAME	TYPE	OBJECT
Sales Rep3	Permission Set	
Buy	Custom Object Definition	
Viveka rathna S	User	
lead	Permission Set	
standard user	Profile	
Viveka rathna S	User	
Content	Custom App	
supportforce	Custom App	
AllTabSet	Custom App	
salesforce	Custom App	

Activate Windows
Go to PC settings to activate Windows.

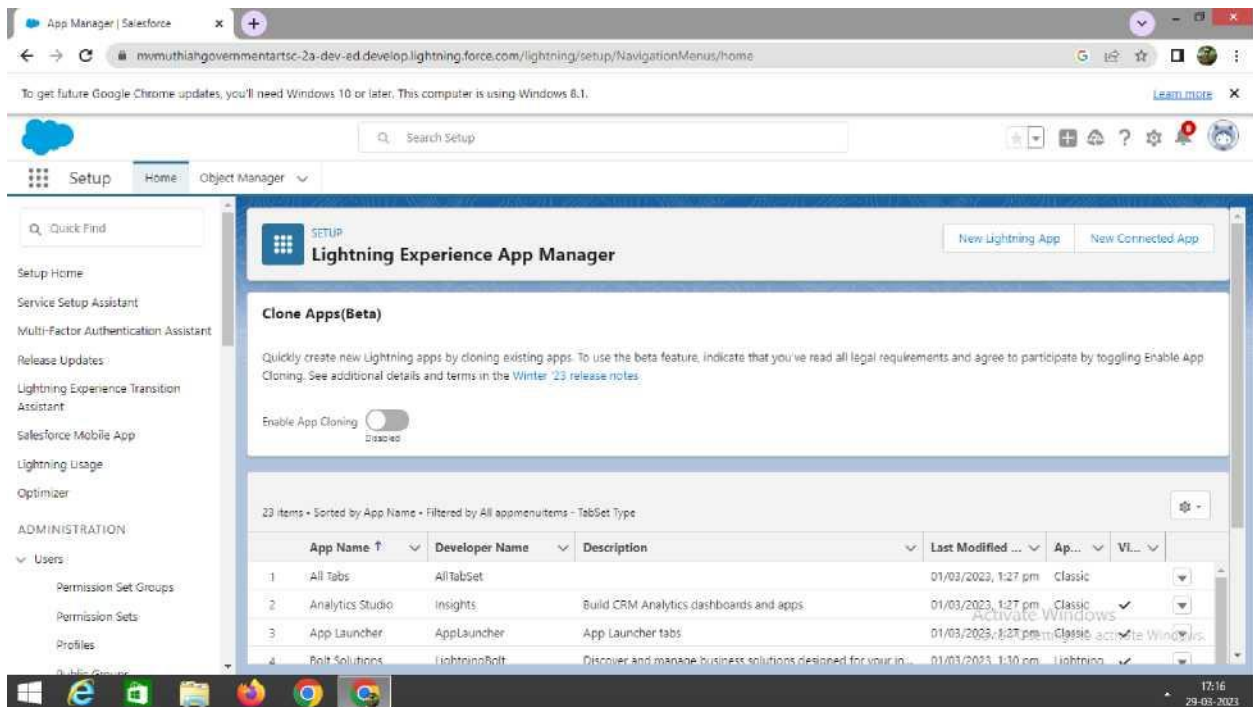
13:37
29-03-2023

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:

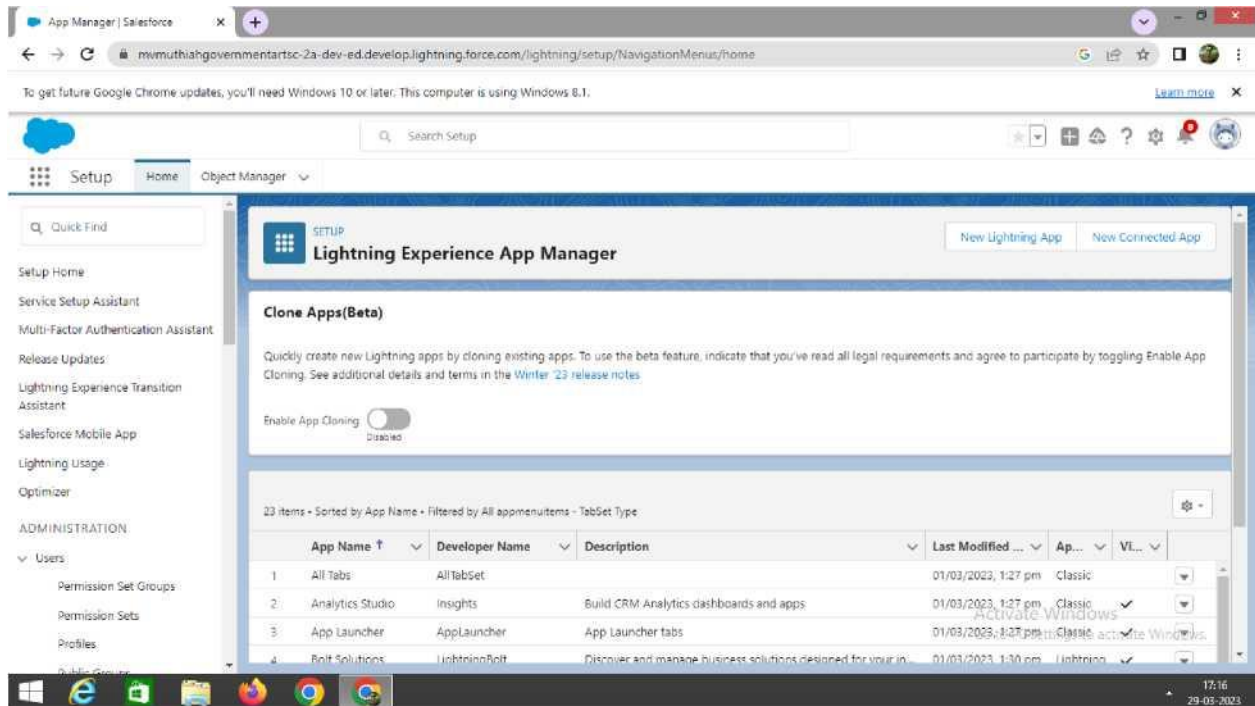
Marketing & Sales

Marketing

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

Sales

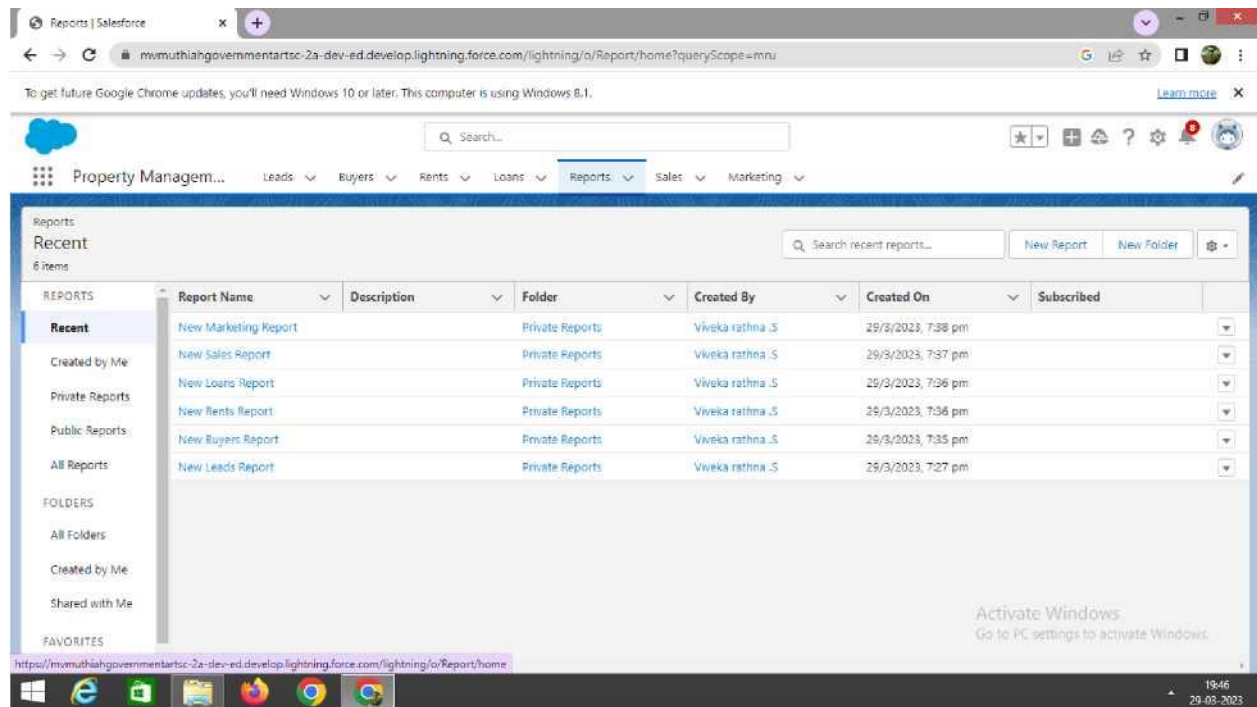
1. Sale Manager OWD is Set As Private similarly sales Rep1, Sales Rep2 same OWD for them



Milestone 10- Report

Create Report

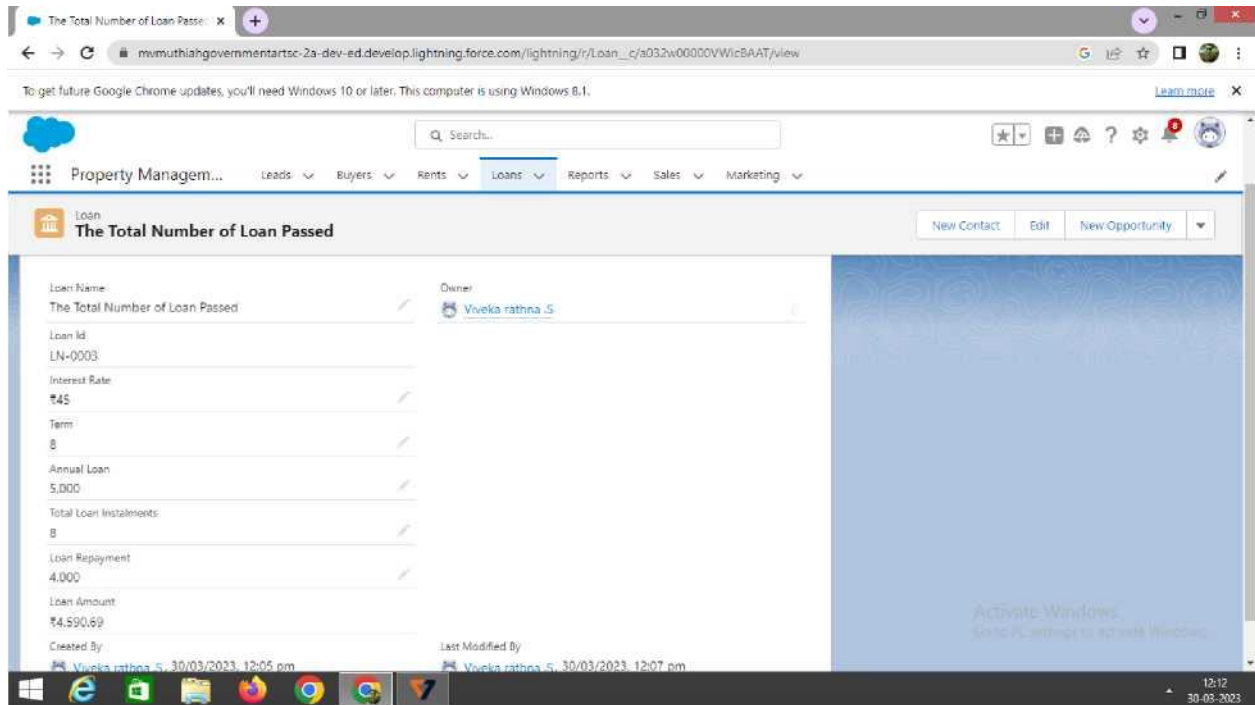
1. Go to the app then click on the reports tab
2. Click New Report
3. Select report type from category or from report type panel or from search panel ?
4. click on start report.
Customize your report, then save or run it.



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\$

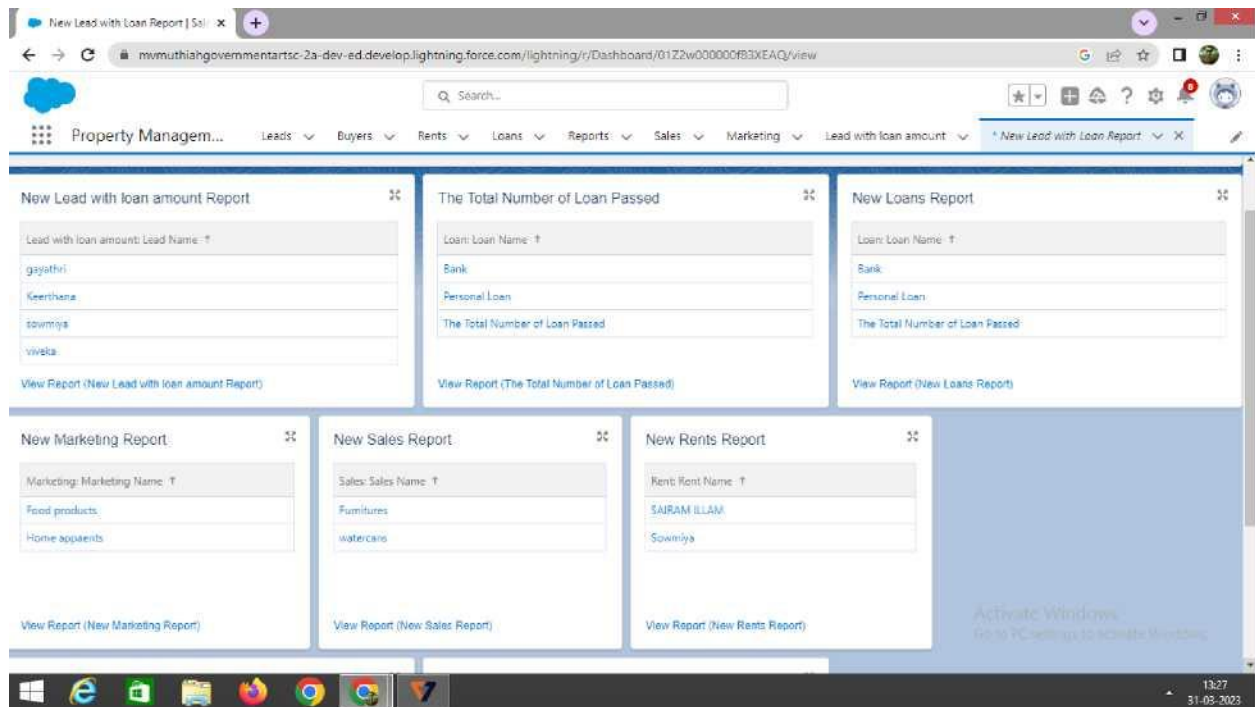


Milestone 11- Dashboards

ACTIVITY 1:

Create dashboards

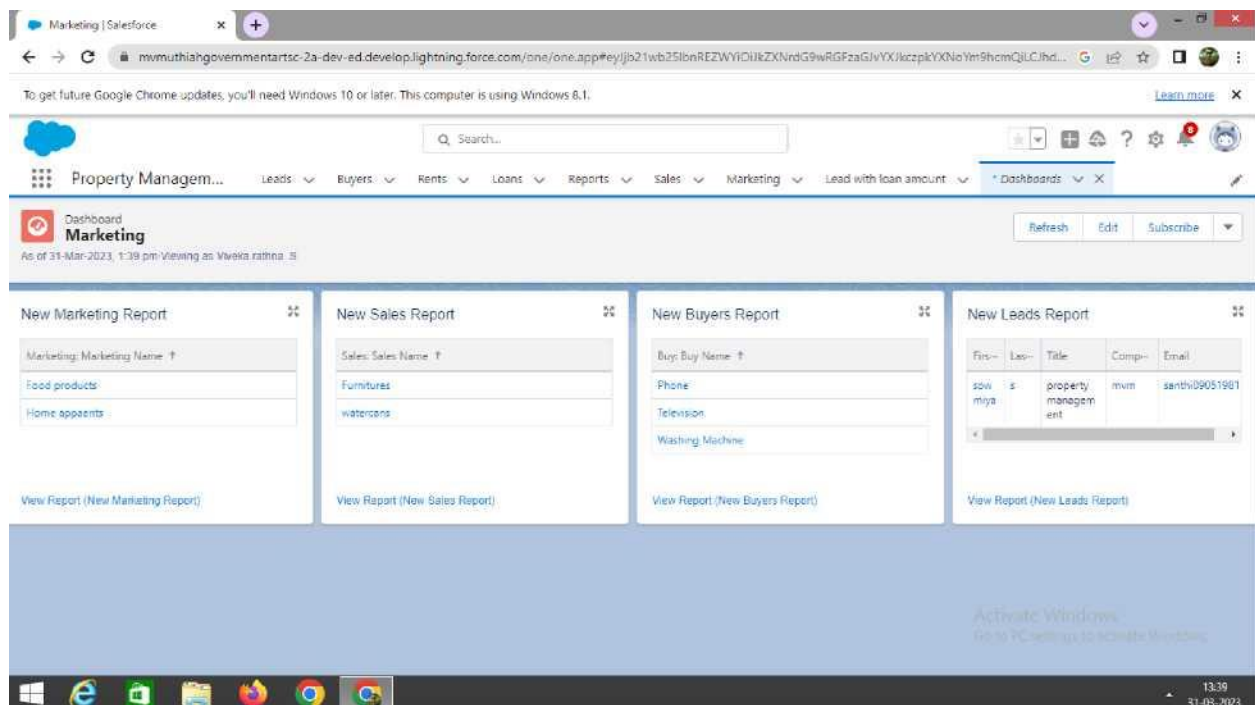
1. Go to the App Launcher and select the Dashboards
2. Select add component
3. Select the folder select the following option new lead with loan Amount
4. Select in which format you want display chart



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





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.