

**NAAN MUTHALVAN PROJECT REPORT**

# Property Management Application Using Salesforce

Team lead : U.Surendhira

Team member 1: A.Satheeshkumar

Team member 2: N.Srikanth

Team member 3: S.B.Venkatasalapathy

# **Property Management Application Using Salesforce**

## **Project Description:-**

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.

## **Salesforce**

### **Introduction**

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers,

collaborate and engage with employees and partners, and store your data securely in the cloud.

## Empathy map:

The screenshot shows a Microsoft Edge browser window with two tabs open. The active tab displays an empathy map titled 'Person 1' and 'Person 2'. The empathy map consists of four columns of yellow boxes containing text. The columns are: Person 1 (left), Person 2 (right), Person 1 (left), and Person 2 (right). The text in the boxes is as follows:

Person 1	Person 2	Person 1	Person 2
- Improve your approach to technology, reporting and communication - Create a killer playbook to grow your client base - Stay organized and check tasks off your To-Do list one by one	The first step is to create templates for everything. Templates streamline the communication process by reducing the need to redo the same thing over and over again.	Successful property managers get things done, which they need to do at the same time they're savvy and experienced enough to make sure other people's jobs take priority over others. If you're going into the industry, it's important to have good work habits.	Of course, you don't want to take out the human element altogether.
Stay updated on things like changes in rules and regulations, local rent rates and other emerging trends related to real estate	Property owners want to be assured that the manager they're dealing with knows what they're talking about, so always be learning.	Considering what you'll be dealing with on a daily basis, you need to maintain a positive, can-do attitude at all times.	More and more software, mobile, and cloud solutions are being designed to make property management processes easier and more efficient.
Not only will you be facing the inevitable landlord-tenant disputes, but you'll also need to stay calm when the market isn't going the way you want it to.	To avoid any landlord-tenant issues, you need to have a system for screening and finding quality tenants.	The system should help you automate processes like background checks, security deposits and related paperwork.	To keep up, you need to adapt to and embrace these changes.
		Here are some questions you need to ask before setting a long-term strategy	You'd be surprised at the number of property managers who don't do this. Having a long-term strategy for setting goals makes you thoroughly focused and motivated.
		- How has your property management business performed in terms of tenant retention? - Are there procedures that can be improved to better serve property owners and your tenants?	- What can be done to lessen expenditures? - Are your tenants and property owners satisfied with the service you're offering?

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file:///C:/Users/ADMIN/Downloads/NM2023TMID08498%20BRAINSTROM.pdf

1 of 1 | Fit to page Page view Read aloud Add notes

## Person 3

How efficient are you at collecting rents, deposits and the like?

One habit of successful property managers is curiosity. They are always on the lookout for more innovative ways to accomplish their goals.

Other ways property managers can improve resident engagement are:

Some people make decisions on gut feel. Others make them intuitively. And still others do a combination of both.

A successful property manager knows that forging genuine connections with their clients is crucial.

- Implement engagement strategy basics.
- Aim for transparency.
- Align contact center objectives with business goals.
- Train your staff to provide consistent, high-quality service.

However you make a decision, stand by it. Any consequences should be dealt with ASAP.

Get to know your residents personally. Take the time to engage the people living in the properties you manage. You might be surprised at what you'll get from a quick catch-up.

Great property managers are always on the lookout for growth opportunities.

## Person 4

These opportunities involve taking advantage of every possible avenue to market your business.

Before your client moves in, do a proper inspection of the rental property. A pre-tenancy report allows you to identify any issues beforehand.

They go above and beyond to make sure they achieve their objectives.

The first step to kick-starting your company growth is scouring local real estate markets, property management networks and other places where you can do

As the saying goes, first impressions last. How you present your company on your website makes the difference between a client who says "yes" and one who says "I'll pass."

Successful property managers have a strong desire to achieve success.

- Dedicate yourself to discovering innovative solutions.
- Join associations.
- Conduct research.
- Attend seminars.

Property managers conduct thorough and regular inspections of the properties they handle.

Type here to search O 4:31 AM 4/26/2023

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All tools Edit Convert Sign Find text or tools

Person 1

Person 2

Person 3

Person 4

Person 5

Person 6

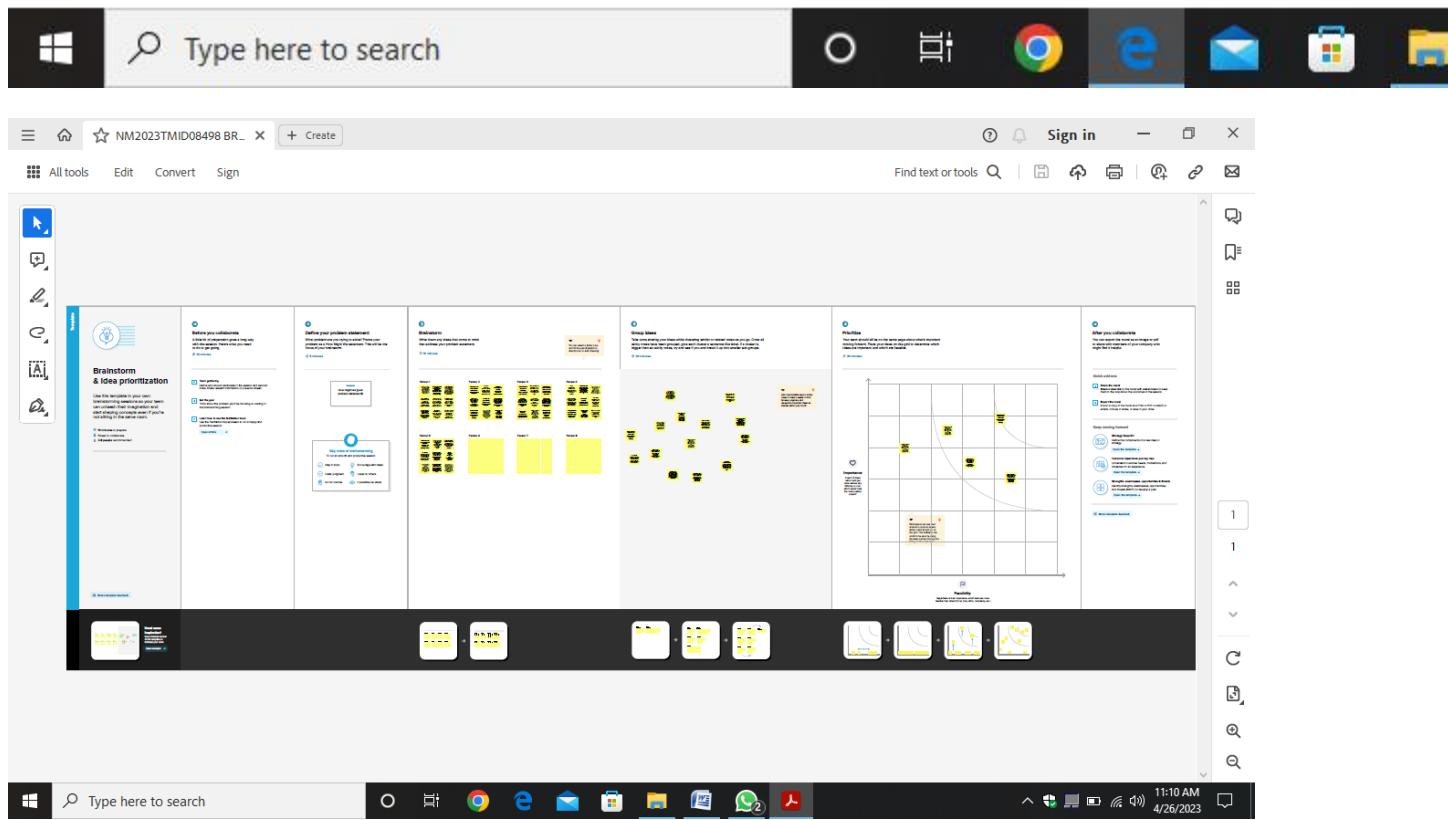
Person 7

Person 8

Here are some additional ideas you may need to see something inspiring & long-term thinking.

The currently selected item is highlighted in yellow. It is a daily task, and it is part of the main goal of the system.

200.00 x 64.64 in < 11:11 AM 4/26/2023



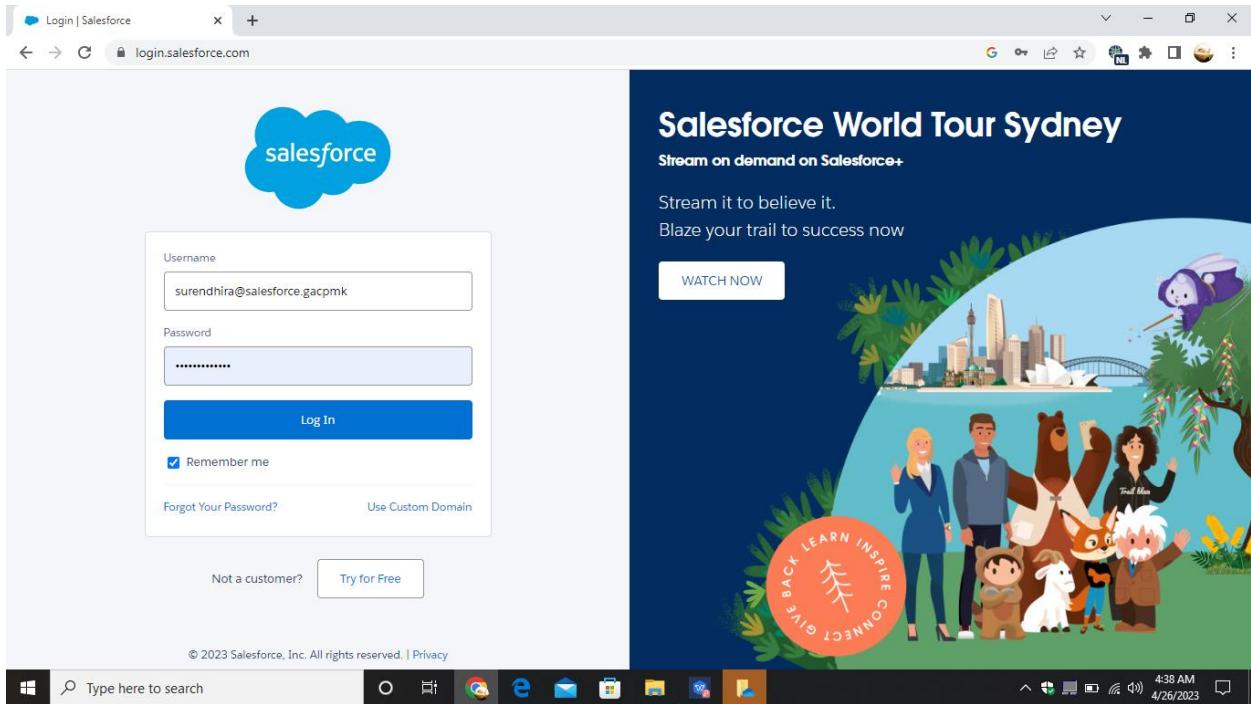
## Result

### Data model:

Object name	Field in the object	
Buy	Field name	Data type
	Property Type	Picklist
	Discount	Percentage
	State	Picklist
	City	Field Dependency
Rent	Field name	Data type
	Rental City	Data Name
	BHK type	Picklist
Loan	Field name	Data type
	Loan Id	Auto number
	Interest Rate	Currency
	Term	Number
	Total Loan Instalments	Number
	Loan Repayment	Number
	Loan Amoun	Formula

# Creating Developer Account

Creating a developer org in salesforce.



## What Is Object?

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:

- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **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.

### Create Object Buy

The screenshot shows the Salesforce Object Manager interface for the 'Buy' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' tab is selected, showing the following fields:

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

At the bottom right of the main area, there is an 'Edit' button. The browser address bar shows the URL: governmentartscollegeparam9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w0000048UNg/Details/view.

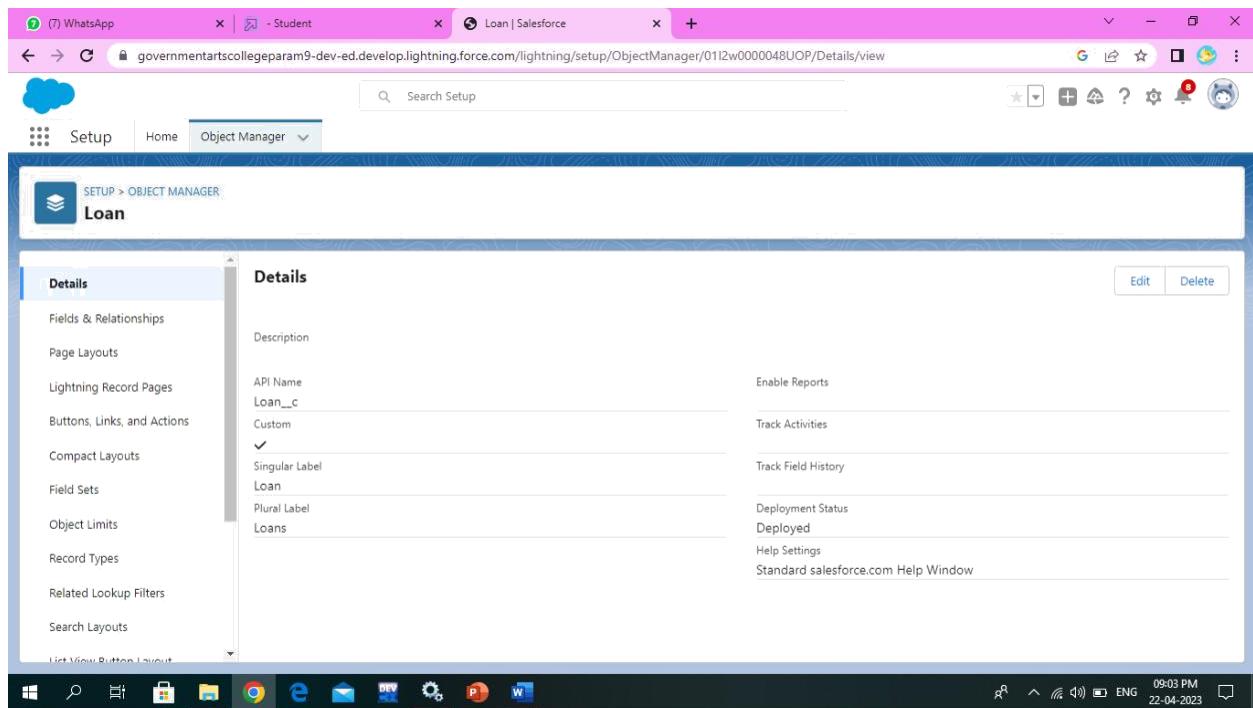
## Create Object Rent

The screenshot shows the Salesforce Object Manager interface for the 'Rent' object. The left sidebar lists the same configuration tabs as the 'Buy' object. The main 'Details' tab is selected, showing the following fields:

Description	
API Name	Rent__c
Custom	✓
Singular Label	Rent
Plural Label	Rents
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the main area, there are 'Edit' and 'Delete' buttons. The browser address bar shows the URL: governmentartscollegeparam9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w0000048UVt/Details/view.

## Create Object Loan



# Tab

## What is Tab?

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

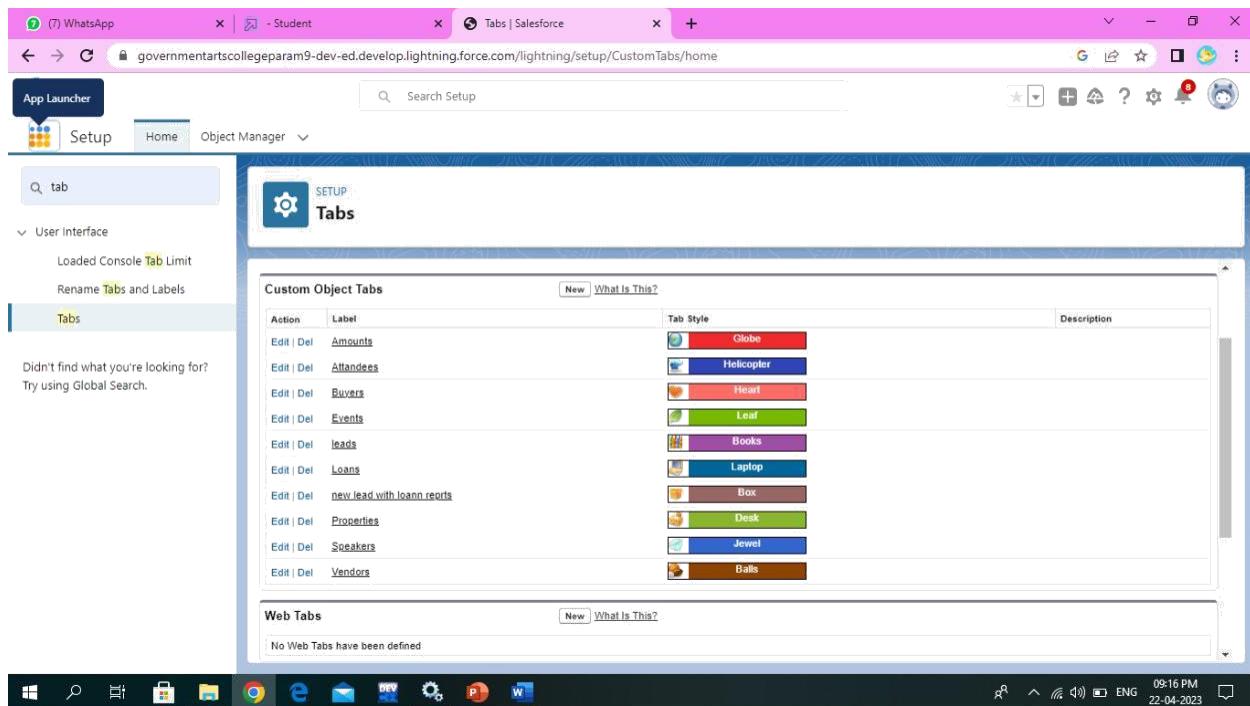
## Create The Lightning Tab

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.



## 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.

## 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

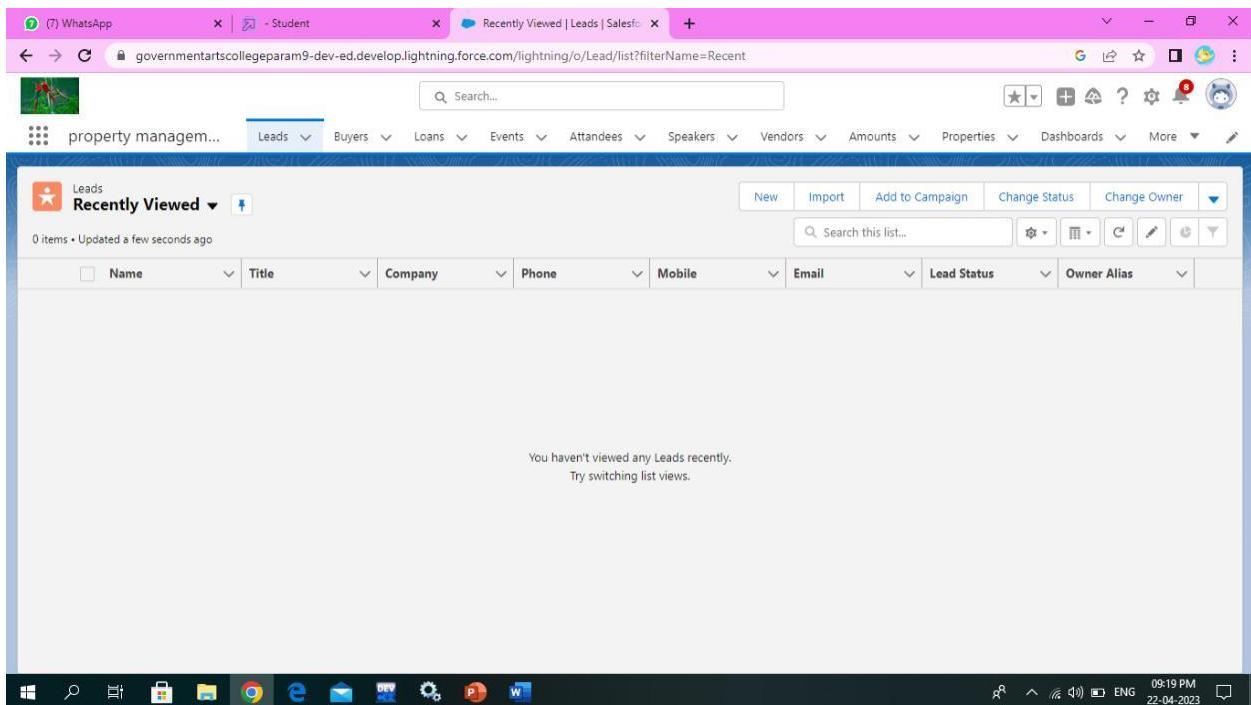
platform user, Standard User then Next.

#### 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.



## Fields

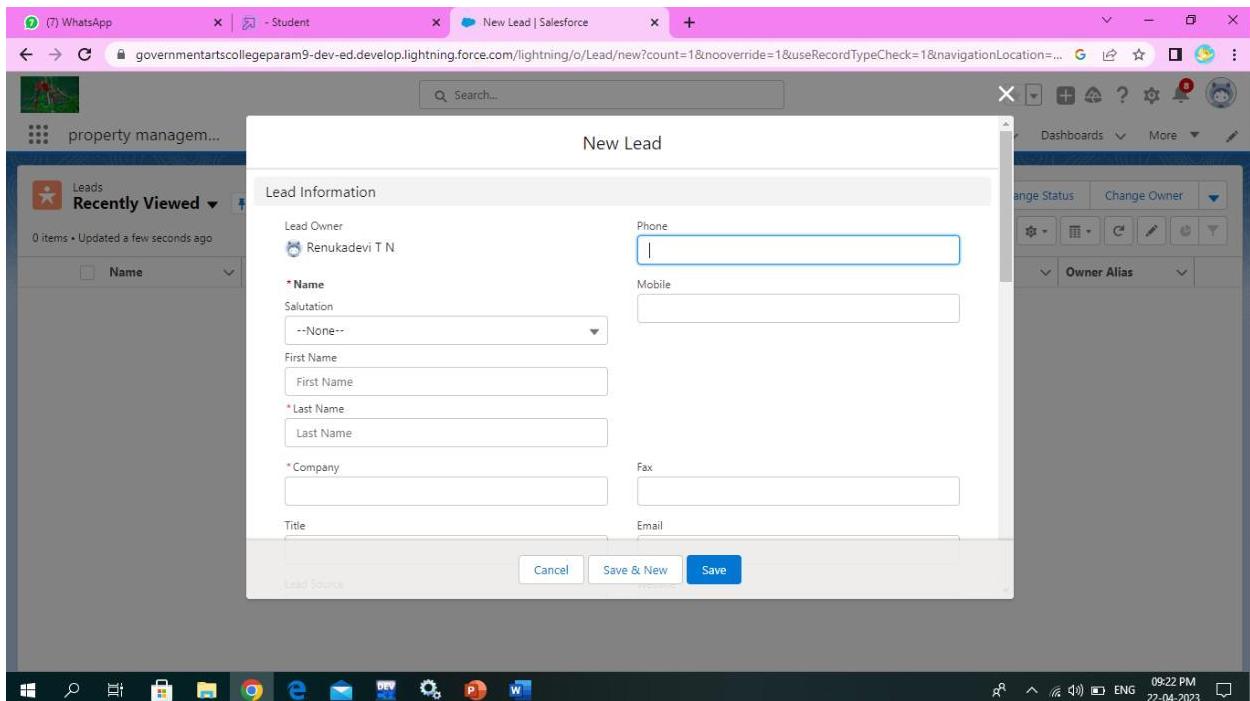
As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

### **Custom Fields:**

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

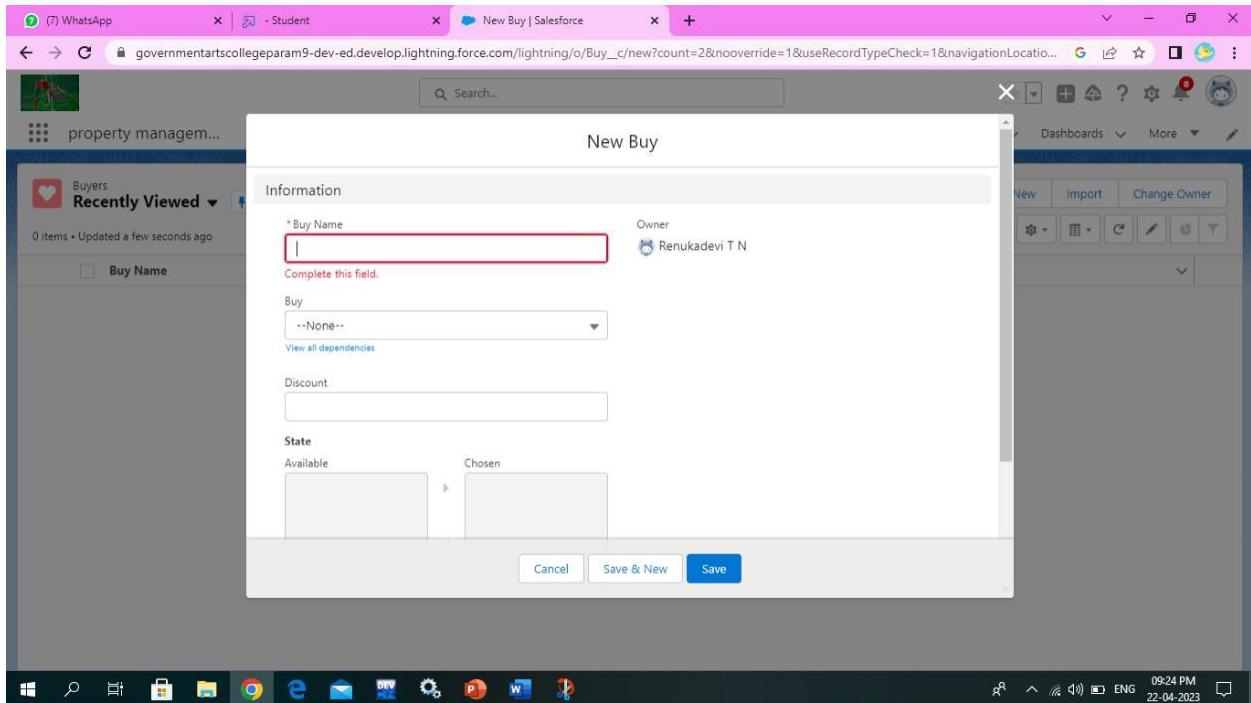
## **Create The Lead Field**



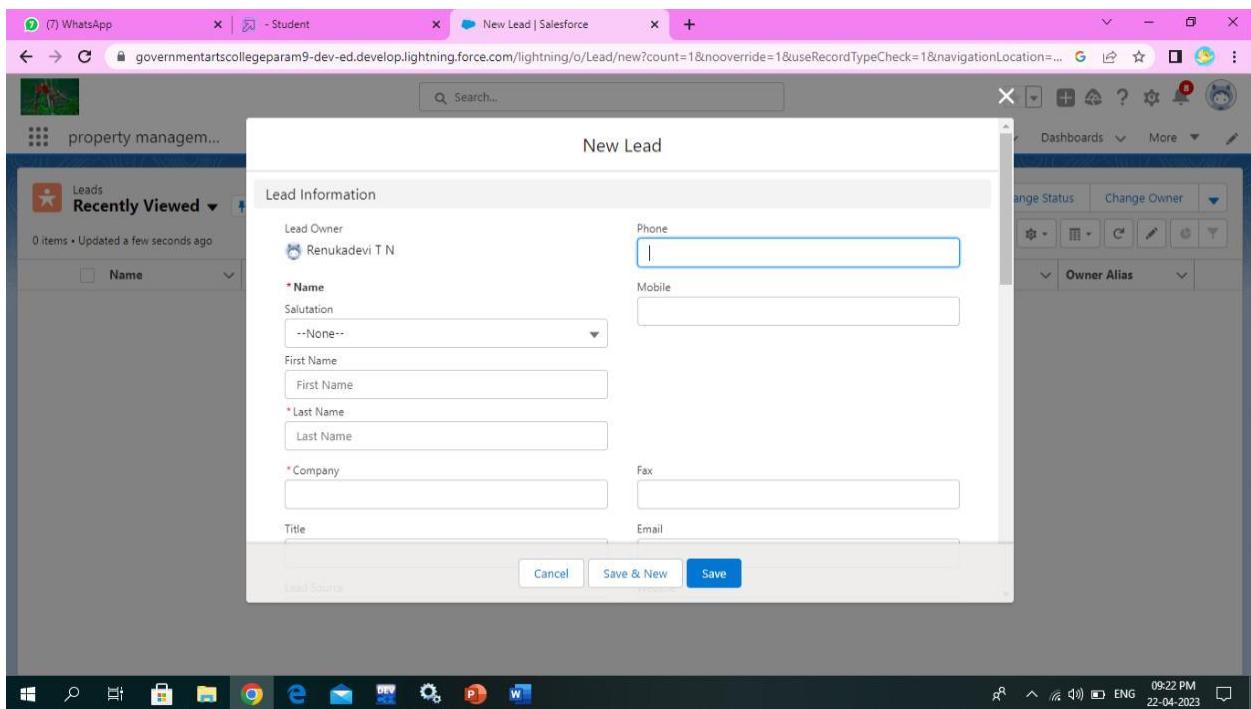
## **Create For Object Buy**

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



## Create Field For Loan



# **Profile**

1. A profile is a group/collection of settings and permissions that define what a user can do in salesforce.
2. profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.
3. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

## **Types of profiles in salesforce**

### **A. Standard profiles:**

1. By default salesforce provide below standard profiles.
2. We cannot deleted standard ones
3. Each of these standard one includes a default set of permissions for all of the standard objects available on the platform.

### **B. Custom Profiles:**

1. Custom ones defined by us.
2. They can be deleted if there are no users assigned with that particular one.

# **Create Marketing and sales:**

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. The main content area has a header 'SETUP Profiles' with a user icon. Below it, a section titled 'Profiles' displays a table of profiles. The table columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The data rows are:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Del   ...	Marketing Executive1	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Marketing Executive2	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Marketing Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>

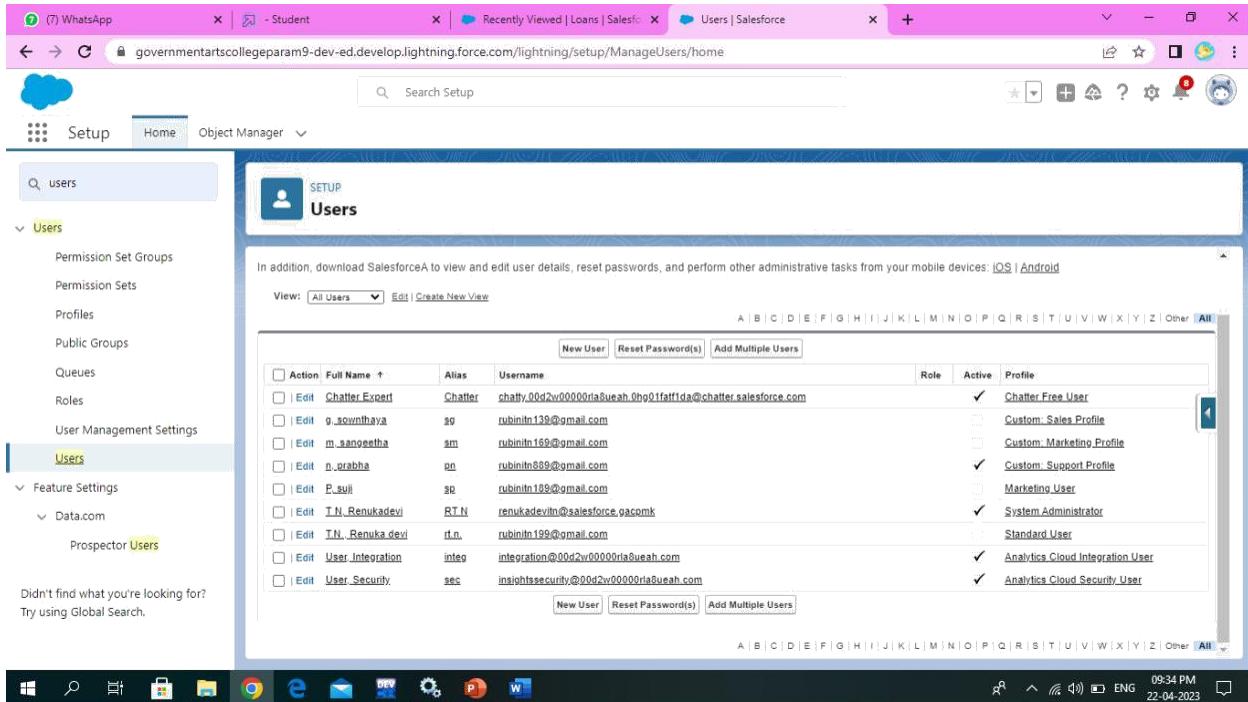
At the bottom of the page, there are navigation links for 'A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All' and a 'Page 1 of 1' indicator. The status bar at the bottom right shows the time as '09:31 PM' and the date as '22-04-2023'.

## 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.

## Create User

1. Go to setup then type users in quick find box then select users then click New user.
2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) then save.



## Permission Set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

## 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

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and sections for 'Lightning Experience Transition Assistant', 'Users', 'Permission Set Groups', 'Permission Sets' (which is selected), 'Feature Settings', 'Digital Experiences', 'Sales', 'Accounts', 'Salesforce Scheduler', and 'Scheduling Policies'. The main content area is titled 'Permission Sets' and contains a table listing various permission sets with their descriptions and associated licenses. The table includes columns for 'Action', 'Permission Set Label', 'Description', and 'License'. Some rows have a 'Clone' link next to them. The table shows 27 entries, with the first few being 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', and 'Facility Manager'. The 'Buyer' entry is described as allowing access to the store and having a 'B2B Buyer Permission Set One Seat' license. The 'Facility Manager' entry is described as letting users create, read, edit, and delete locations and has a 'Facility Manager' license.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone	Buyer	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	CRM User	CRM User
<input type="checkbox"/>	Clone	Commerce Admin	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...
<input type="checkbox"/>	Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact...
<input type="checkbox"/>	Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...
<input type="checkbox"/>	Del   Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Clone	Facility Manager	Facility Manager

## Setup For OWD

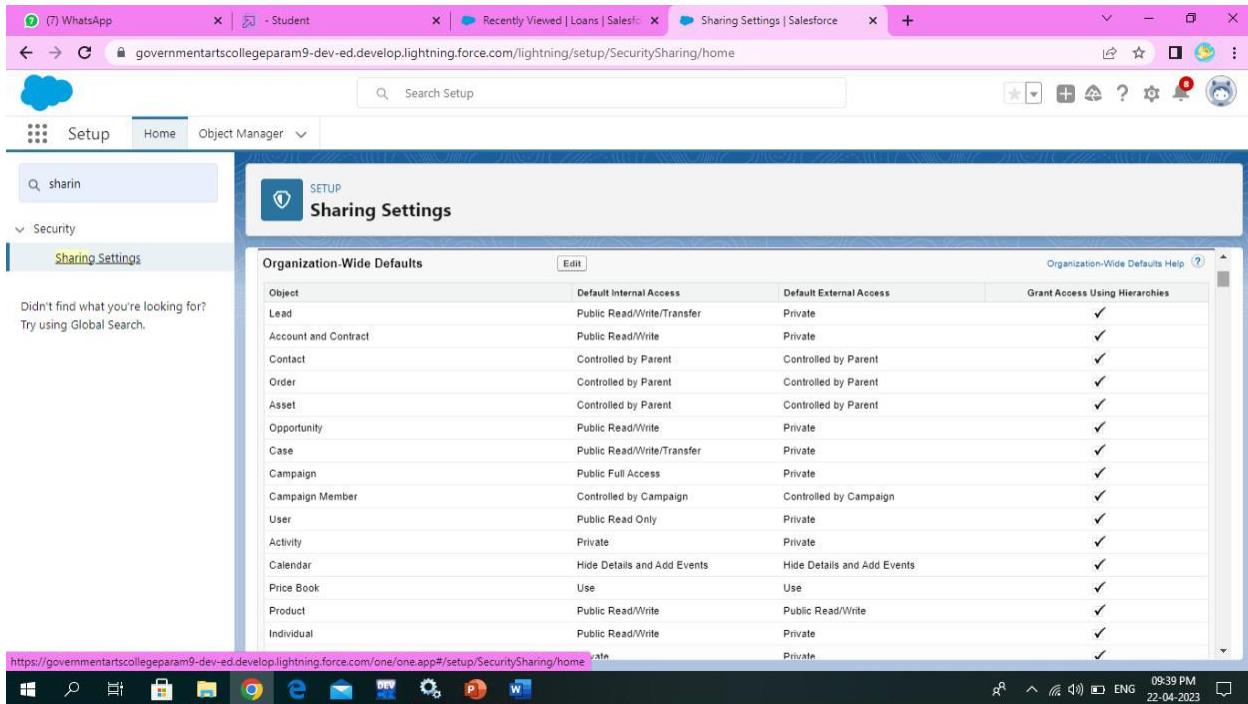
Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

Primarily, there are four levels of access that can be set in Salesforce OWD and they are-1. Public

Read/Write/Transfer (only available of Leads and Cases)

2. Public Read/Write
3. Public Read/Only
4. Private

# Create OWD Setting



The screenshot shows the Salesforce Sharing Settings page under the Setup menu. The page title is "Sharing Settings". A search bar at the top right contains the text "sharin". The left sidebar has a "Sharing Settings" section selected. The main content area displays a table titled "Organization-Wide Defaults" with columns for "Object", "Default Internal Access", "Default External Access", and "Grant Access Using Hierarchies". The table lists various Salesforce objects and their access settings. The "Grant Access Using Hierarchies" column contains several checked checkboxes.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
		Private	✓

## Marketing & Sales

### Marketing

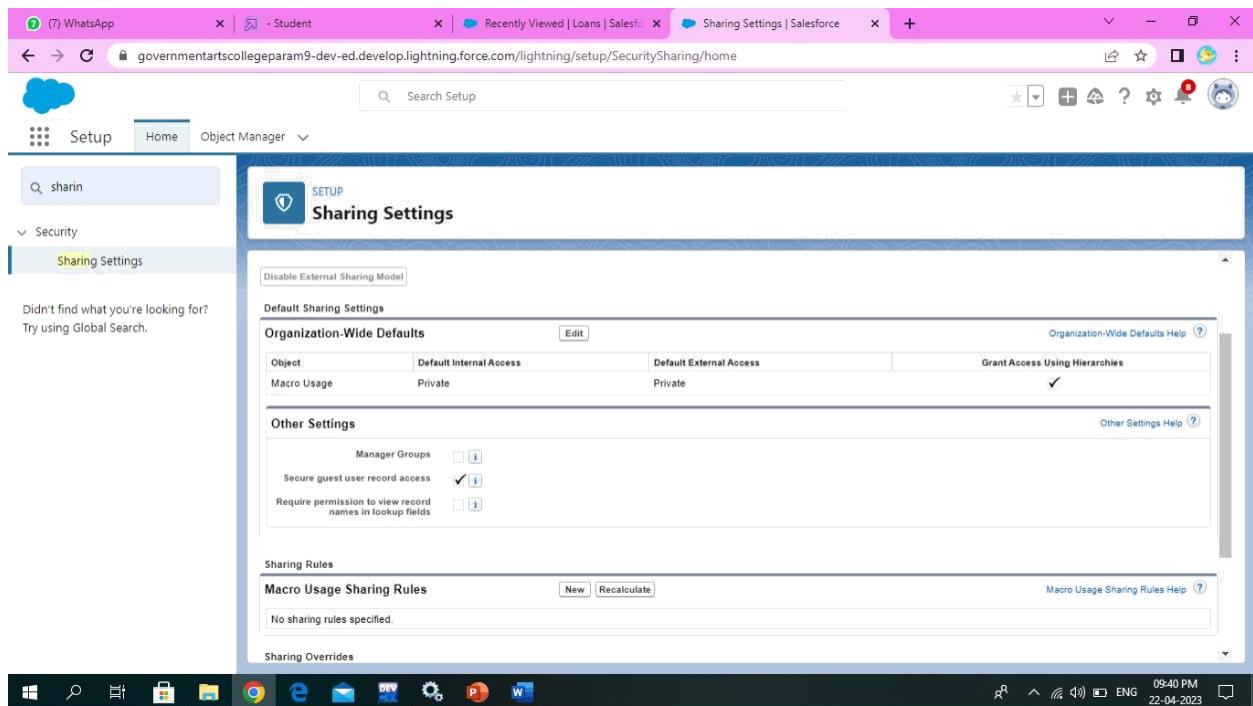
1.Create the Record Level OWD Setting give it As A Private To Marketing manager And Marketing Executive

### Sales

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

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Always we are explain about this.....



# Report

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

## Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

# Create Report

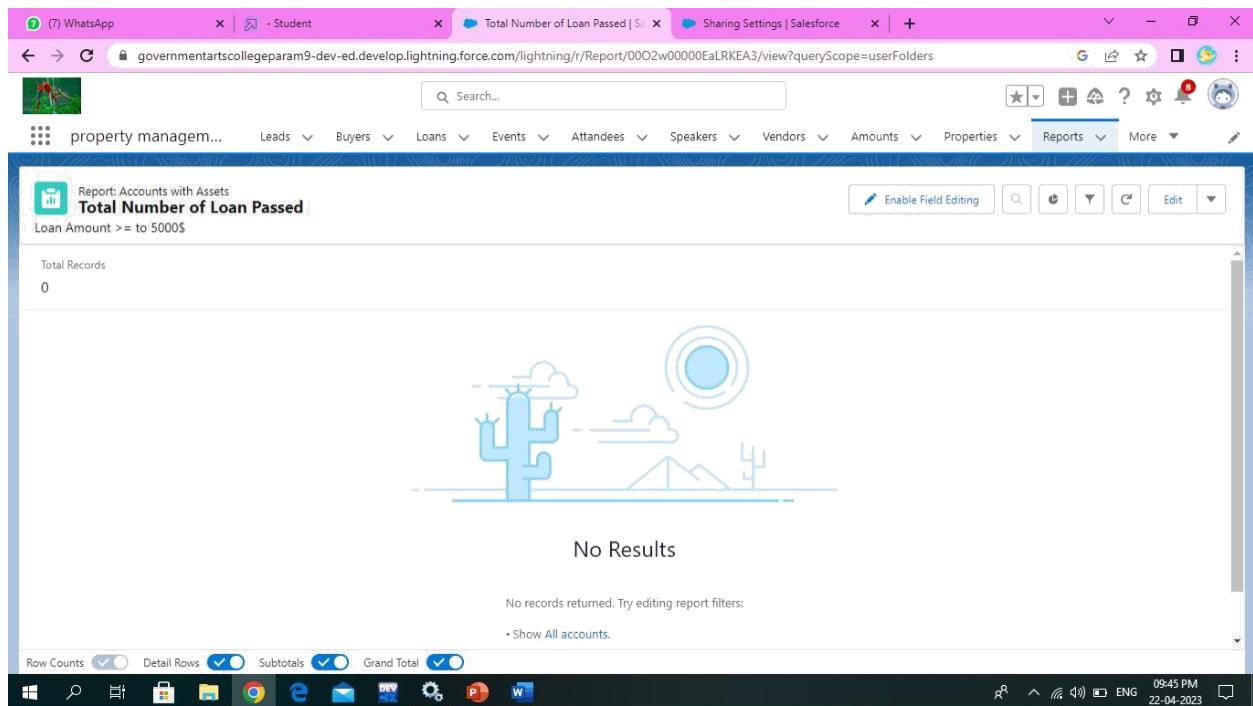
1. Go to the app then click on the reports tab
2. Click New Report
3. Select report type from category or from report type panel or from search panel ? click on start report.
4. Customize your report, then save or run it.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Total Number of Loan Passed	Loan Amount >= to 5000\$	Private Reports	Renukadevi T N	22/4/2023, 1:28 pm	
Created by Me	New Accounts Report		Private Reports	Renukadevi T N	22/4/2023, 1:24 pm	
Private Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	16/3/2023, 10:26 am	
Public Reports	Property Management		Private Reports	Renukadevi T N	21/4/2023, 10:56 am	
All Reports	Event Management		Private Reports	Renukadevi T N	20/4/2023, 9:55 am	

## Create Report 2

Create Report for following Condition

- 1.Create the Report of the Total Number of Loan Passed for getting the Amount For the Property
2. The Condition should be Like Loan Amount >= to 5000\$



## Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

## 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

1.Create the Dashboard for the Same Take Any Type of Dashboard(Chart) And Display It on The App Home Page

Dashboards

Recent

5 items

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	New lead with loan amount	Loan amount	Renukadevi T N	21/4/2023, 10:23 am		
Created by Me	Property Management	Loan amount	Renukadevi T N	21/4/2023, 12:54 pm		
Private Dashboards	Property Management	New lead with loan amount	Renukadevi T N	21/4/2023, 4:31 pm		
All Dashboards	Property Management	Private Dashboards	Renukadevi T N	21/4/2023, 12:35 pm		
	Property Management	Loan amount	Renukadevi T N	21/4/2023, 10:20 am		

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Trailhead URLs:

Team Lead - <https://trailblazer.me/id/smagesh6>

Team Member 1 – <https://trailblazer.me/id/satha69>

Team Member 2 – <https://trailblazer.me/id/ssrikanth67>

Team Member 3 – <https://trailblazer.me/id/venkatasalapathy>

## **Benefits of Salesforce CRM**

While the base of what makes Salesforce CRM one of the most evident customer relationship management tools is prominent, its benefits help a business reach customer expectations. These benefits include:



### 1. Automation Tools

For any business to prosper, communication with customers needs to be top-notch. After all, the delayed response triggers or pushes away potential and an existing customer to the competitors. However, with Salesforce, companies no longer have to worry about delayed reactions anymore. It is because of the automation tools it uses to initiate instant communication with the customers through chats on its website.

## 2. Data Analytics Tools

With the help of data analytic tools, companies keep track of the customer's past records and help themselves understand better customers' expectations and requirements. Ultimately, with the help of data analytic tools, company's can set up marketing campaigns and strategies to bring more engagement to their sites.

## 3. Tracking Customer Activity

To gain any customer's loyalty, a company will have to understand the details and behavior of their customer's activities. Salesforce CRM has a Sales Cloud feature that allows the company to track customer's records, contact details, backgrounds, etc. that can help a company make practical changes to its strategies and plans for better performances.

## 4. Data Syncing

You must know that several social media sites allow users to syncing their data from one platform to another in some capacity. Salesforce Mobile App also allows for such data syncing where your business can integrate data from different apps in one place. Such flexibility offered by Salesforce CRM ensures that your company has an easier time analyzing all the essential data to be more efficient.

## 5. Customer Assistance

With the pandemic in effect, practicing social distancing is exceptionally critical. As a result, businesses must provide methods to their customers that they can use for interaction with the company virtually. Salesforce's online chat feature, Live Agent, is a great chat box to accomplish that goal.

## 6. Omnichannel Feature

Replying to numerous customers at a time can be difficult. I mean, whoever can have an easier time switching between multiple accounts to respond to their followers without delay? Nobody. Salesforce service control provides an omnichannel feature that brings a unified approach that provides customers a consistent experience and helps the company.

## 7. Customer Engagement

It is a proven method that consistent engagement with customers is what helps a company gain loyalty. Also, for any company's long-term sustainability and profit, it is crucial to have loyal customers. Loyal customers help businesses grow through their organic positivity word of mouth by bringing in more eyeballs to the brand or its product and services. With Salesforce, a company can launch several marketing campaigns that can help bring in personal engagement with the existing customers, such as email marketing.

## 8. Keeps the Audience in One Place

For effective management and processing of essential measures, a company must keep all its user's and customer's data in one place. It helps with organizing and analyzing the data in the best possible manner. Salesforce includes Sales Cloud, Service Cloud, and Analytics for its users to ensure better Customer Relationship Management (CRM).

## 9. Builds App

Nowadays, many people have a mobile phone. Also, more than browsing about a product and service, customers prefer looking out for apps that help them accomplish such activities. After all, customers find apps more convenient and easier to use than browsing multiple pages on a web browser to land the information they have been looking for, for so long. With Salesforce CRM, companies can even build their apps to ensure better connectivity and engagement with their customers.

## 10. Gather Insights

In any business, the more knowledge you will have about your customers, the better your chances of success will be. Having more knowledge about the customers will help you better understand what's working and what isn't. Salesforce CRM has Marketing Cloud Insights that ensure its users can comfortably gather insights related to their customers. With the Marketing Cloud Feature, you can analyze the customers' behavior and detect the latest trends bringing in better.

## **Advantage and disadvantage of property management**

- 1. Enhanced check-in/check-out capabilities.**
- 2. Increased housekeeping efficiency.**
- 3. All data in one place.**
- 4. Improved revenue management.**
- 5. Better customer data management.**
- 6. Increased employee productivity and engagement.**
- 7. High data security.**

- 1. Time-consuming if you choose the wrong system. ...**
- 2. Might seem expensive for a small business. ...**
- 3. Training (cost and time).**

## **APPLICATION:**

The main objective of the Property Management System is to manage the details of Sellers, Approvals, Property, Registrations, Property Type. It manages all the information about Sellers, Buyers, Property Type, Sellers.

## **CONCLUSION:**

PMS and PMDD are complex but highly treatable disorders. Pharmacists can improve the recognition and management of these common conditions by providing patient education on premenstrual symptoms and counseling women on lifestyle interventions and pharmacotherapy to relieve their discomfort.

## **FUTURE SCOPE:**

Portfolio Growth, Revenue Growth, Improved Efficiency and Customer Experience. The 4 goals of property management might well be returning as the number one real estate investment priority — drawing profit from rental real estate invest



Thank you!