

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

Project Report Template

1 INTRODUCTION

1.1. Overview

Property management is the daily oversight of residential, commercial, or industrial real estate by a third-party contractor. Generally, property managers take responsibility for day-to-day repairs and ongoing maintenance, security, and upkeep of properties. They usually work for the owners of investment properties such as apartment and condominium complexes, private home communities, shopping centers, and industrial parks.

1.2. *Purpose*

Property managers **assist owners in creating budgets, advertise rental properties, qualify tenants and collect rent**. They also comply with the local landlord and real estate board laws and maintain the property.

2 PROBLEM DEFINITION AND DESIGN THINKING

EMPATHY MAP
Identifying stakeholder behaviour

THINK & FEEL?

- Is this possible to get reportings through online?
- Is this an Legal Implementation ?

HEAR?

what does (s)he
What friends say
What the boss says
What influences say

- Easy to get your Rental Property
- Easy to get Legal Implementation
- 24/7 Support to customer Loyalty

SAY & DO?

what does (s)he

- Property has a Licence
- Appearance with Loyalty and patient

SEE?

what does (s)he
Environment
Friends
What the market offers

- They give better reporting
- Use to Maintain the managements

PAINS

Icon: Sad face

Issues
Situations
obstacles

- There might be a leasing fee
- Weak number of directbooking
- Disorganized reporting

GAINS

Icon: Happy face

"wants"/needs
measures of success
obstacles

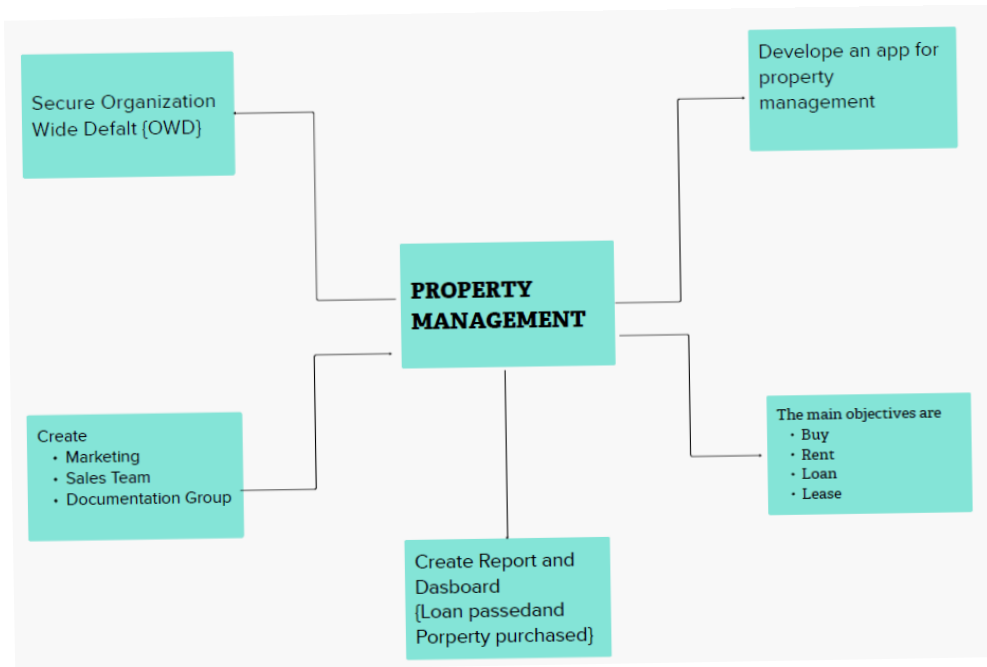
- Easy Maintenance
- Monitoring
- Better Reporting
- Easy Payments from Tenants to Contractor

Prepared by:
EVENT DESIGN
2014 EVENT DESIGN COLLECTIVE GAMING

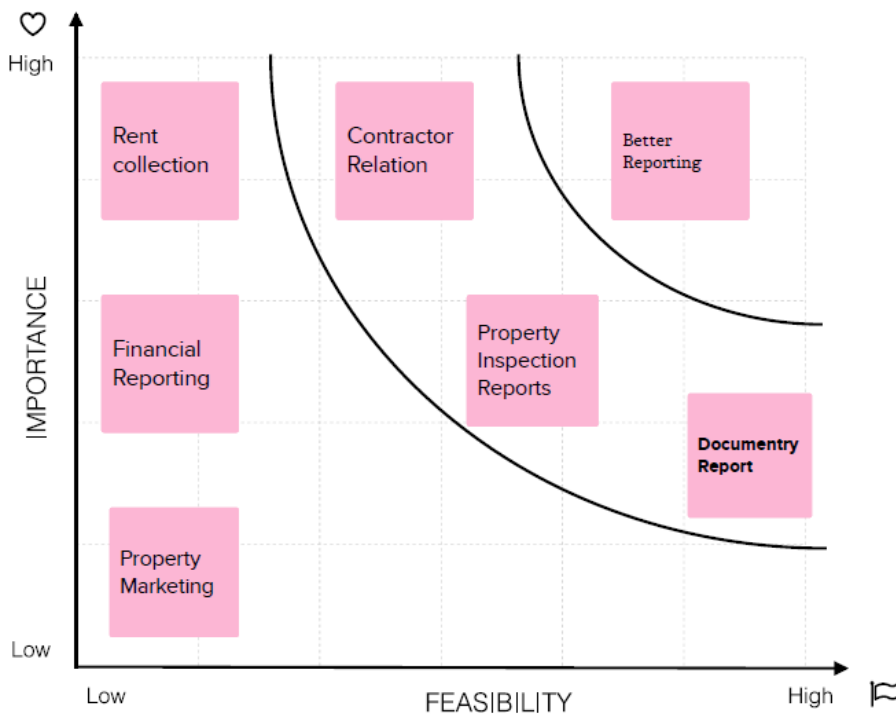
EVENT DESIGN USING THE EVENT CANVAS™ METHODOLOGY
www.eventcanvas.org

version 20180621
Source: adapted from XPLAND

2.2 IDEATION AND BRAINSTROMING MAP



Idea Prioritization



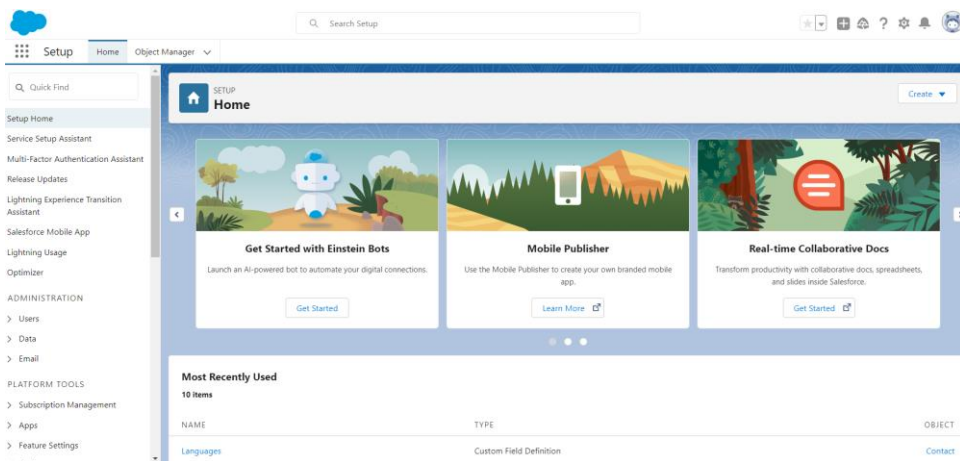
3 RESULT

3.1 Data modeling

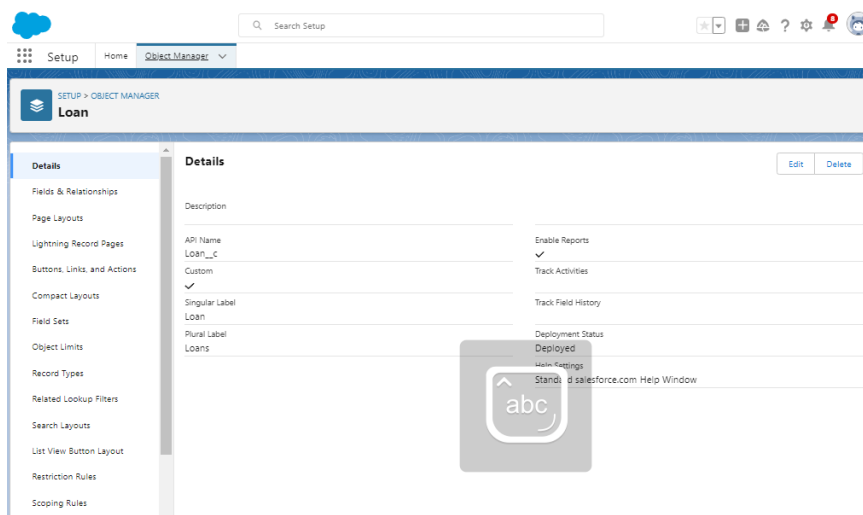
<i>Object name</i>	<i>Field label</i>	<i>Data type</i>
Buy	Buy, Property type Discount State City	Picklist(Multi-select) Picklist Percentage Picklist(Field dependency) Picklist
Rent	Rent Rental city BHK Type	Auto number Text(19) Picklist
Loan	Loan ID Interest Rate Term Annual Loan Total loan instalments Loan Repayments Loan Amount	Auto number Currency Number Number Number Number Formula
Lead	Lead State City Email phone	Auto number Picklist(Field dependency) Picklist(Field dependency) Email Phone


3.2 Activity and Screenshot

Salesforce account login









Creation of object (Rent, Loan,Buy,Lead)





Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Rent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Details

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

EditDelete



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Buy

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Scoping Rules

Details

Description

API Name
Buy__c

Custom

✓

Singular Label
Buy

Plural Label
Buyers

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete

Salesforce Setup interface showing the **Lead** object configuration page under **Object Manager**.

Left Navigation Menu:

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Details Section:

Description

API Name: Lead_c

Enable Reports: ☒

Custom: ☒

Singular Label: Lead

Plural Label: Leads

Track Activities: ☒

Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Buttons: Edit, Delete

Creation of tab

Salesforce Setup interface showing the **Custom Tabs** configuration page.

Left Navigation Menu:

- Setup
- Home
- Object Manager
- Custom Tabs

Search: tabs

User Interface:

- Rename Tabs and Labels
- Custom Tabs

Custom Tabs Section:

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs:

Action	Label	Tab Style	Description
Edit Del	System	Real Estate Sign	
Edit Del	Leads	Lightning	
Edit Del	Loans	Bank	
Edit Del	Plans	Building	

Web Tabs:

No Web Tabs have been defined.

Visualforce Tabs:

No Visualforce Tabs have been defined.

Lightning Component Tabs:

No Lightning component tabs have been defined.

Creation of lightning app

The image shows two screenshots from the Salesforce Setup interface. The top screenshot displays the App Manager, and the bottom screenshot displays the Fields & Relationships section for the Lead object.

Top Screenshot: App Manager

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

Didn't find what you're looking for? Try using Global Search.

Enable App Cloning ☐ Disabled

22 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified	Ap...	VL...
4 Bolt Solutions	LightningBolt	Discover and manage business solutions ...	18/03/2023, 8:18 pm	Lightning	✓
5 Community	Community	Salesforce CRM Communities	18/03/2023, 8:16 pm	Classic	✓
6 Content	Content	Salesforce CRM Content	18/03/2023, 8:16 pm	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor...	18/03/2023, 8:16 pm	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of you...	18/03/2023, 8:16 pm	Lightning	✓
9 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lig...	18/03/2023, 8:16 pm	Lightning	✓
10 Marketing	Marketing	Best-in-class on-demand marketing auto...	18/03/2023, 8:16 pm	Classic	✓
11 Platform	Platform	The fundamental Lightning Platform	18/03/2023, 8:16 pm	Classic	✓
12 Property management	Property_management		23/03/2023, 6:46 pm	Lightning	✓
13 Queue Management	QueueManagement	Create and manage queues for your busi...	18/03/2023, 8:16 pm	Lightning	✓
14 Sales	Sales	The world's most popular sales force aut...	18/03/2023, 8:16 pm	Classic	✓
15 Sales	LightningSales	Manage your sales process with accounts...	18/03/2023, 8:19 pm	Lightning	✓
16 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps wor...	18/03/2023, 8:16 pm	Lightning	✓
17 Salesforce Chatter	Chatter	The Salesforce Chatter social network, Inc...	18/03/2023, 8:16 pm	Classic	✓
18 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment schedul...	18/03/2023, 8:18 pm	Lightning	✓

Bottom Screenshot: Fields & Relationships for Lead

SETUP > OBJECT MANAGER

Lead

Details

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Picklist (Multi-Select)	State	
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Lead	Lead__c	Auto Number		
Lead Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone__c	Phone		
State	State__c	Picklist		

Setup

Home

Object Manager

Q profile

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

Search Setup

Star

Share

Help

Settings

Notifications

Avatar

SETUP

Profiles

Profiles

Help for this Page

All Profiles

Edit

Delete

Create New View

New Profile

f2

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

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

Setup

Home

Object Manager

Q profile

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Restriction Rules

Scoping Rules

Fields & Relationships

7 Items. Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK type	BHK_type__c	Picklist		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Owner	OwnerId	Lookup(User.Group)		<input checked="" type="checkbox"/>
Rent	Rent__c	Auto Number		<input type="checkbox"/>
Rent Name	Name	Text(80)		<input checked="" type="checkbox"/>
Rental city	RentaCity__c	Text(19)		<input type="checkbox"/>

X

Creation of users

govt.itsandsciencecollegez i-dev-ed.develop.lightning.force.com/lightning/setup/manageusers/home

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP Users

Help for this Page

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

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

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Event	Chatter	chatty002w00000rnlakeai.cdg@lightning.force.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Saravanan Yogeswari	YSara	yogeswari@opasch.com		✓	System Administrator
<input type="checkbox"/> Edit	Saravanan Yogeswari	ysara	yogeswari.sara400@gmail.com	VP Marketing	✓	Property Management
<input type="checkbox"/> Edit	User Integration	integ	integration@0062w00000rnlakeai.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@0062w00000rnlakeai.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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

Creation of permission sets

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

SETUP Permission Sets

Help for this Page

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

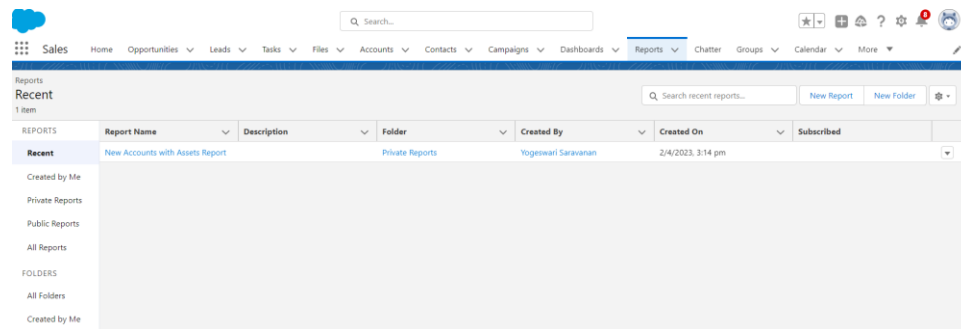
New Add

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

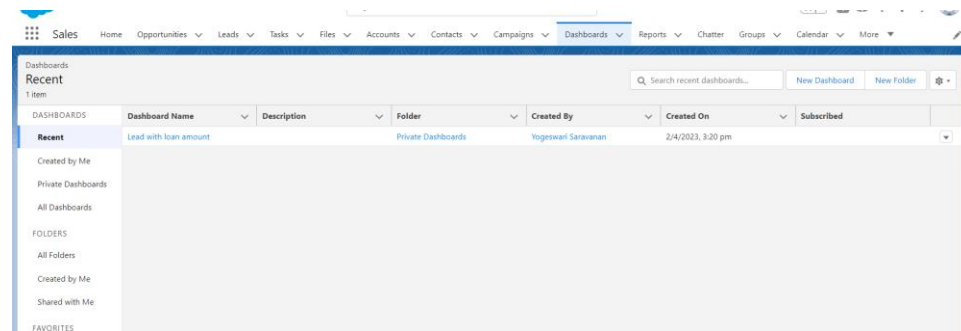
Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products a...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to ...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cl...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contac...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice c...	Service Cloud Voice User
<input type="checkbox"/> Clone	Experience Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, su...	Facility Manager
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Servi...	Field Service Mobile
<input type="checkbox"/> Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set Licen...
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Manage...	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Shopper	Limited access to Order Management features for Se...	Lightning Order Management User

1-26 of 26 0 Selected 4 Previous Next Page 1 of 2

Creation of reports



Creation of dashboard



4 Trailhead profile public URL

Team lead - <https://trailblazer.me/id/ysaravanan7>

Team member 1 – <https://trailblazer.me/id/mohammedmaaz>

Team member 2 – <https://trailblazer.me/id/sshilpa21>

Team member 3 – <https://trailblazer.me/id/xtcsjowh>

5 Advantages and Disadvantages

ADVANTAGES

- Access your information from anywhere at any time.
- Save time and Money being more efficient.
- Use Mobile app credentials for secure client access.

DISADVANTAGES

1. Always dependent on one vendor
2. Cost can be banned in the beginning

6. Application

1. Property management application used in maintenance management and tracking.
2. It is also used for advertising, marketing and financial management.

7 Conclusion

Property management application is very crucial for all the hotels .
This applications is the best for all hospitality business.

8 Future scope

The trend of using software is projected to grow at an unprecedented rate in the future of property management. The growth is expected since the pandemic has catalyzed tech startups that specialize in property management solutions.

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