

Project Report - PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION :

Overview A brief description about your project :

Comparison of Property Management CRM Software

What Property Management CRM Software Should Have

What is salesforce for Property Management

Why Real Estates Companies Use Salesforce for property Management

Benefits of Salesforce CRM for Property Management

Pros & Cons of customizing Salesforce for Property Management Needs

Comparison of Property management Software

Pro & Con of Out -the -box saleeforce -based solutions for property Management

Pro and Cons of Development a Custom property Management app on of Salasforce

Con of Custom Development

Comparison of property Manaagement software

Agent Hub Proper CRM & MLS

1.2 Pur pose The use of this project. What can be achieved using :

Property management enables the salaforce for Real Estate companies to keeps a track of crucial date about financial & household properties incorporating associated cash flow primary tenants and occupancy rates

Salesforce property management has powerful tools to remain associated with clients and



tenants continuously support further connections track key data about business and residential properties including occupancy rates essential tenants and revenue and take your productivity, and business growth to the next level.

Lease Management

Keep track of tenancy contracts

Full inventory administration

Capture and oversee client demand

Receivables Management

Sales and marketing

EMPATHY MAP ;





Empathy map

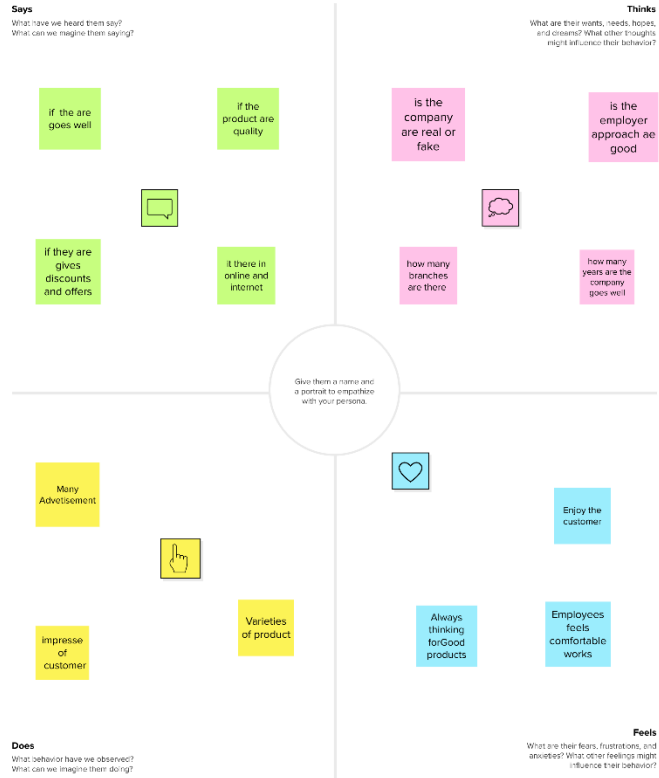
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)



Build empathy

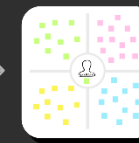
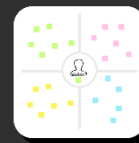
The information you add here should be representative of the observations and research you've done about your users.



Need some inspiration?

See a finished version of this template or kickstart your work.

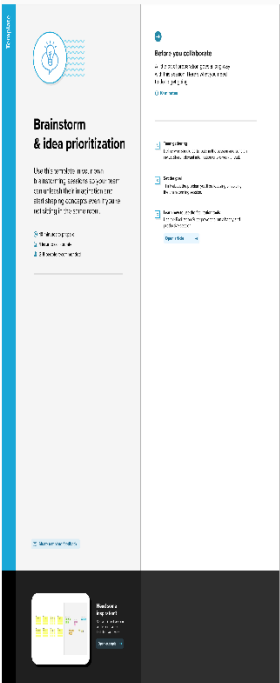
[Open example](#)



BRAINSTORM

:

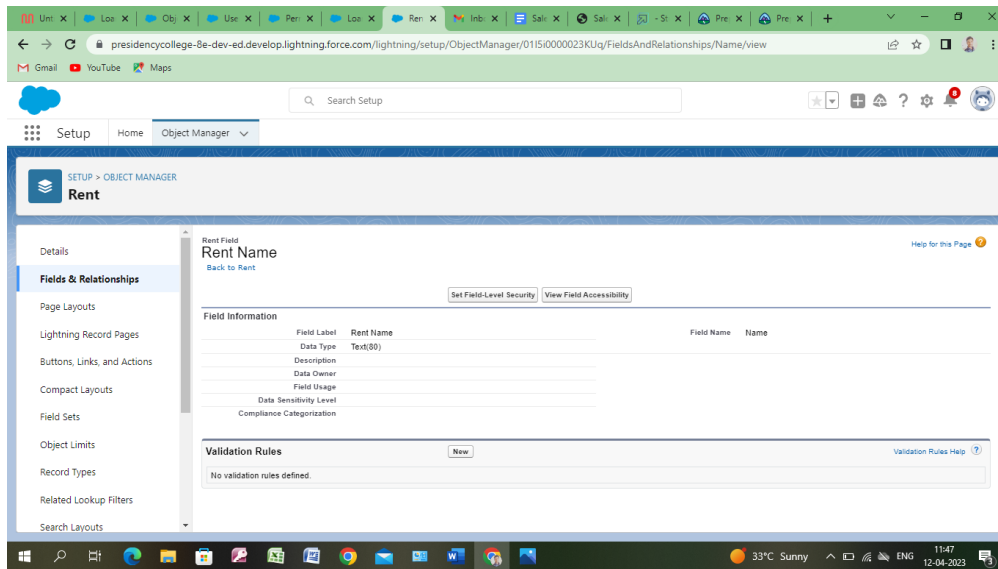
Object Name	Fields in the object				
Buy	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Buy Name</td><td>Text(80)</td></tr></table>	Field Label	Data Type	Buy Name	Text(80)
Field Label	Data Type				
Buy Name	Text(80)				
Loan	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Loan Name</td><td>Text(80)</td></tr></table>	Field Label	Data Type	Loan Name	Text(80)
Field Label	Data Type				
Loan Name	Text(80)				



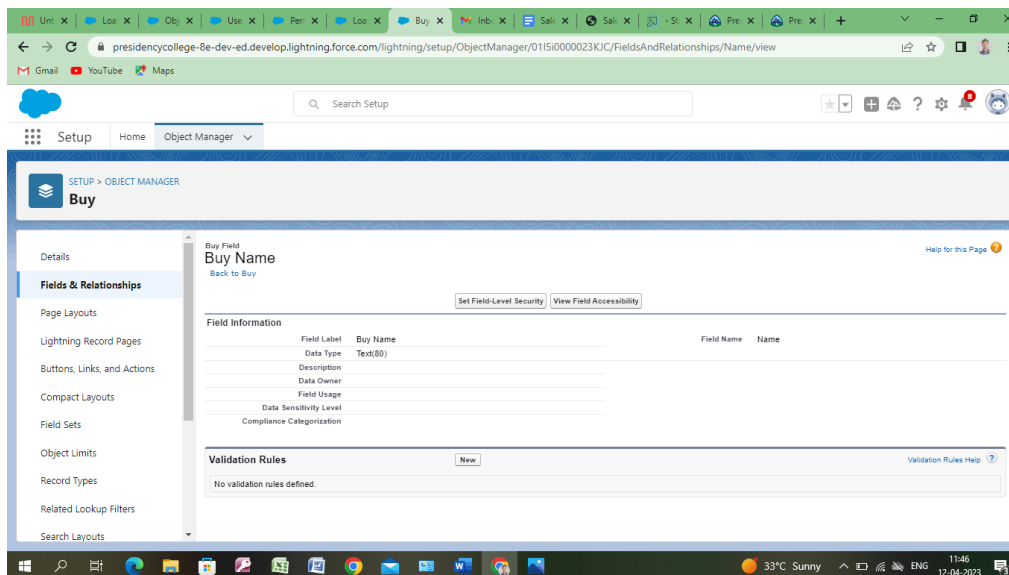
Rent		
	Field Label	Data Type
	Rent Name	Text(80)

Ativity & Screenshot

Rent :



Buy ::



Loan :

The screenshot shows the Salesforce Setup interface for configuring the 'Loan Name' field. The left sidebar contains navigation options: Details, Fields & Relationships (selected), 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 content area is titled 'Loan Name' and includes a 'Back to Loan' link. It features two tabs: 'Set Field-Level Security' and 'View Field Accessibility'. The 'Field Information' section displays the following details:

Field Label	Loan Name	Field Name	Name
Data Type	Text(80)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

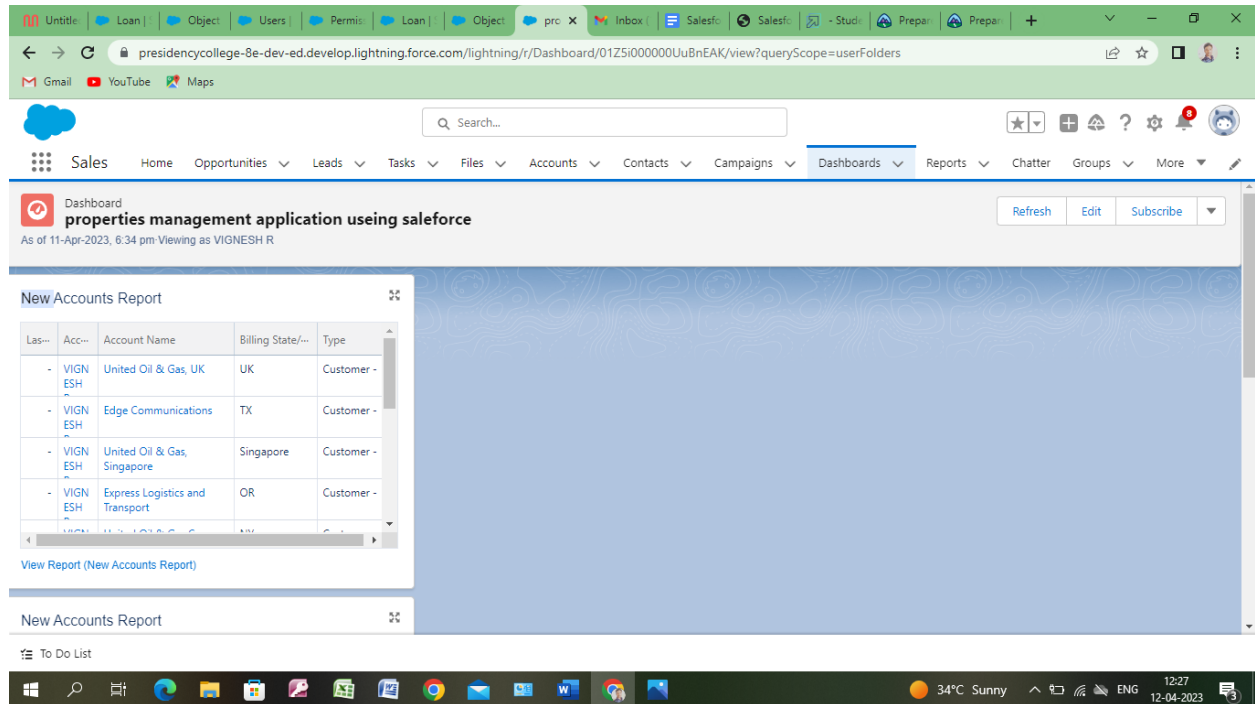
Below the field information is the 'Validation Rules' section, which currently shows 'No validation rules defined.' and a 'New' button to create a rule. A 'Validation Rules Help' link is also present.

Users :

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains navigation options: user (searched), Users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, Prospector Users, User Interface, Action Link Templates, and Actions & Recommendations. The main content area is titled 'Users' and includes a description: '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](#).' It features a 'View' dropdown set to 'All Users' and a 'Create New View' link. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d500000bvvs6eah.1a7rhahfdgyw@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	k_Thirumal	tk	kthirumal397@gmail.com	VP, Marketing	✓	Standard Platform User
<input type="checkbox"/> Edit	MR. Perumal	pmr	perumalmr697@gmail.com	VP, Marketing	✓	Standard Platform User
<input type="checkbox"/> Edit	R. VIGNESH	VR	vigneshr.vigneshr588@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	r.vignesh	r	rviki0929@gmail.com	VP, Marketing	✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	inteo	integration@00d500000bvvs6eah.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d500000bvvs6eah.com		✓	Analytics Cloud Security User

Dashborad :



Dashboard
properties management application using salesforce
As of 11-Apr-2023, 6:34 pm Viewing as VIGNESH R

Refresh Edit Subscribe

New Accounts Report

Last...	Acc...	Account Name	Billing State/...	Type
- VIGN ESH	United Oil & Gas, UK	UK	Customer -	
- VIGN ESH	Edge Communications	TX	Customer -	
- VIGN ESH	United Oil & Gas, Singapore	Singapore	Customer -	
- VIGN ESH	Express Logistics and Transport	OR	Customer -	

View Report (New Accounts Report)

New Accounts Report

To Do List

34°C Sunny 12:27 12-04-2023

4. Trailhead Profile Public URL :

Team Lead - <https://trailblazer.me/id/rv126>

Team Member 1 - - <https://trailblazer.me/id/thirk11>

Team Member 2 -- <https://trailblazer.me/id/trailblazerperumal>

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

5. Advanteges :

Leverage real time reported and dashboards

Streamline led, Opportunity and contact managemeawedwryyk

Simplify document management and data sharing

Enhance communication and collaboration tools.

Salesforce helps businesses keep track of customer interactions and sales data .

Disadvantages:

Lack of specialists that have a deep understanding of property management business and its priorities.

Higher price if you look at only for technical skills but for industry expertise, especially in specific niches like property management.

Cluttered interface make navigation and simple tasks unnecessarily complex .

You have to pay for add-ons to get the most out of the software

The learning curve never seems to end .

Application :

Customer Relationship Management (CRM): Salesforce is widely known for its CRM capabilities, enabling organizations to manage customer interactions, sales processes, and customer data. Salesforce CRM can help businesses track leads, manage customer data, forecast sales, and monitor customer interactions.

Sales Management: Salesforce can also be used to manage sales processes, including pipeline management, opportunity tracking, and forecasting. The platform provides tools for sales reps to manage their leads, track their deals, and monitor their progress.

Marketing Automation: Salesforce offers marketing automation features that enable organizations create and manage marketing campaigns track leads and monitor campaign performance This can help businesses automate repetitive tasks and improve the efficiency of their marketing efforts.

Conclusion :

In conclusion, the property management application developed using Salesforce has shown great potential in improving the efficiency and effectiveness of property management



processes. Through the integration of various features such as automated workflows, real-time data analytics, and streamlined communication channels, the application has been able to provide property managers with a comprehensive solution to their needs. The findings of this project demonstrate that the application has the potential to reduce the time and costs associated with managing properties, while also providing a higher level of customer service to tenants.

Customization: Salesforce offers a wide range of customization options that can be used to create a tailor-made property management application. This includes the ability to create custom objects, fields, and workflows that match the specific needs of the property management industry.

Automation: Salesforce has powerful automation tools that can be used to automate routine tasks such as scheduling appointments, sending reminders, and generating reports. This can help property managers save time and increase their efficiency.

Integration: Salesforce can be integrated with other applications such as accounting software, property management software, and marketing automation tools. This can help property managers streamline their workflows and improve their overall operations

Mobile: Salesforce offers a mobile application that can be used by property managers to access important information on-the-go. This can include property listings, tenant information, maintenance requests, and more.





Edit with WPS Office



Edit with WPS Office



Edit with WPS Office