

Project Report - PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION :

Overview A brief description about your project :

Comparision 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

Comparision 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 Purpose The use of this project. What can be achieved using :

Property management enables the Salesforce for Real Estate companies to keep a track of crucial data 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

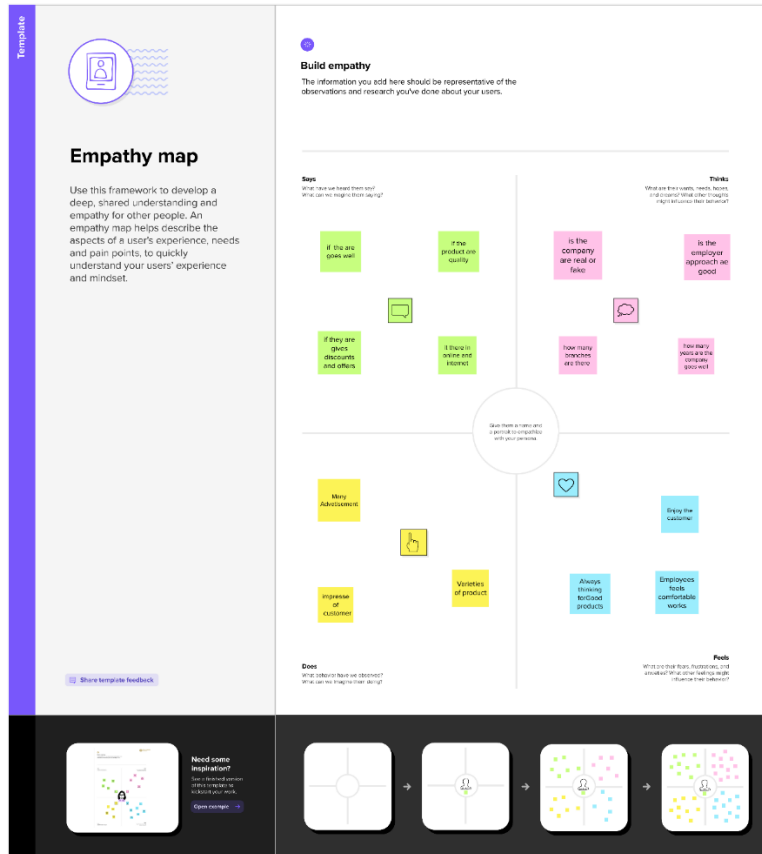
Capture and oversee client demand

Receivables Management

Sales and marketing

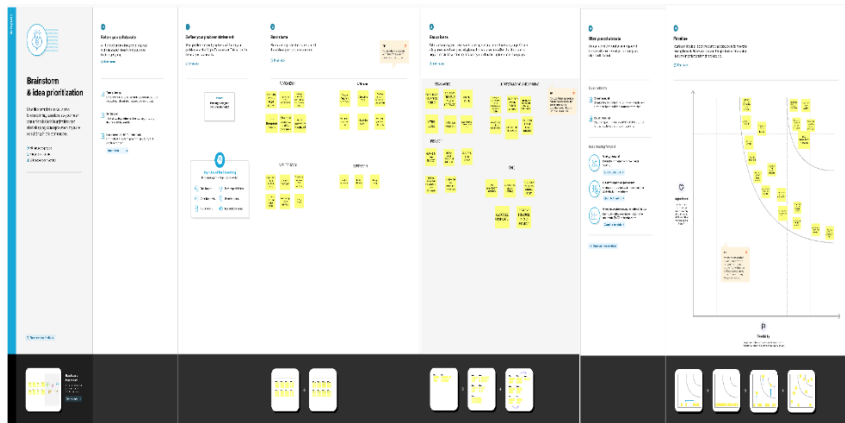


EMPATHY MAP ;



BRAINSTORM

:

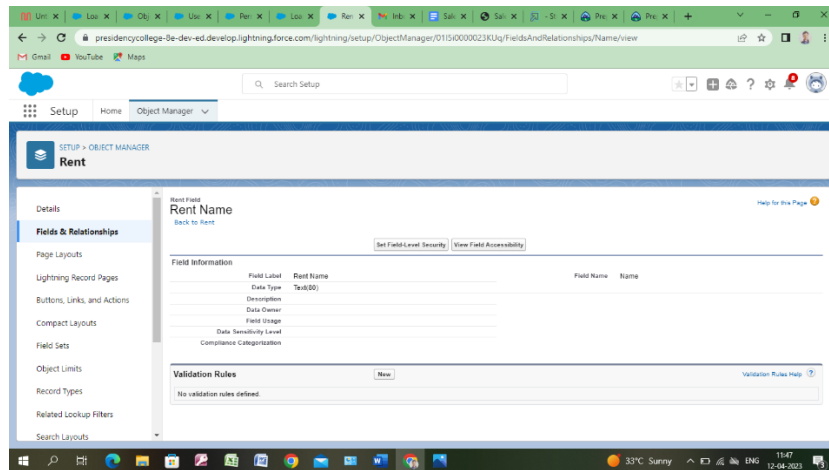


Object Name	Fields in the object	
Buy	Field Label	Data Type
	<i>Buy Name</i>	Text(80)
Loan	Field Label	Data Type
	Loan Name	Text(80)

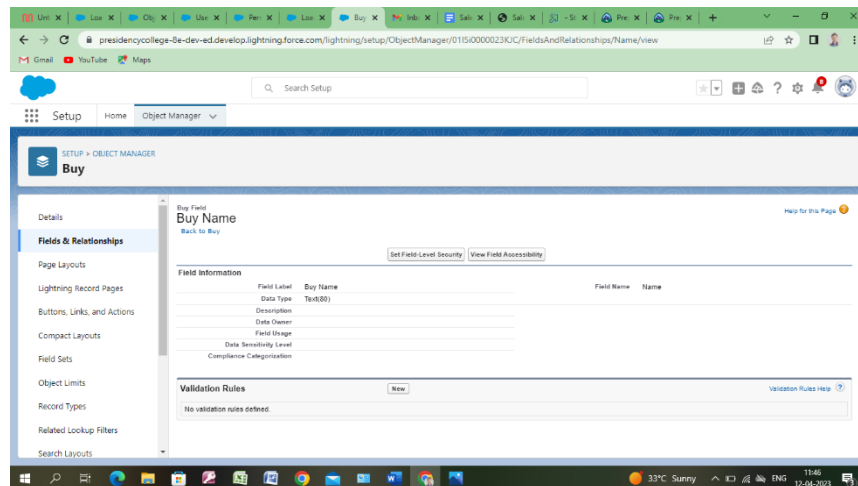
Rent	Field Label	Data Type
	Rent Name	Text(80)

Ativity & Screenshot

Rent :



Buy :



The screenshot shows the Salesforce Lightning Setup interface for the 'Loan' object. The left sidebar contains navigation links: 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. Below this is a 'Field Information' table with columns for Field Label, Data Type, Description, Field Name, and Name. The table lists fields: Loan Name (Text(80)), Description, Data Owner, Field Usage, Date Sensitivity Level, and Compliance Categorization. There are also links for 'Set Field-Level Security' and 'View Field Accessibility'. At the bottom, the 'Validation Rules' section shows 'No validation rules defined' with a 'New' button and a link to 'Validation Rules Help'.

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

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](#)

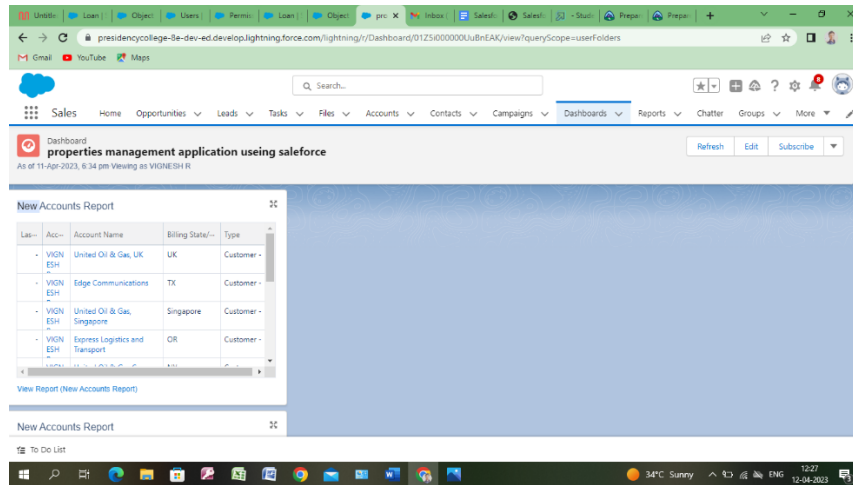
View: [\[All Users\]](#) [Edit](#) | [Create New User](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

	Action	Full Name	Alias	Username	Role	Active	Profile
✖	✖	✖ Chatter_Escort	Chatter	chatter-000500000@prescolleg:sa7nabdev@chatter.salesforce.com		✓	Chatter-Free User
✖	✖	✖ A.Thanmal	A.Thanmal	A.Thanmal387@gmail.com	VP_Marketing	✓	Standard Platform User
✖	✖	✖ MB_Pasumati	mbp	pasumati387@gmail.com	VP_Marketing	✓	Standard Platform User
✖	✖	✖ V.Vijayesh	VJ	vijayeshvijayesh88@gmail.com		✓	System Administrator
✖	✖	✖ S.vijayesh	r	vukh029@gmail.com	VP_Marketing	✓	Standard Platform User
✖	✖	✖ User_Integration	intey	integration-000500000@prescolleg:sa7nabdev@users.salesforce.com		✓	Analyticia Cloud Integration User
✖	✖	✖ User_Security	sec	security-000500000@prescolleg:sa7nabdev@users.salesforce.com		✓	Analyticia Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Dashborad :



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 ommunication and collaboratin 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 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 organization 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.





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