

Project Report Template

Property Management Application using Salesforce

1. INTRODUCTION

1.1 Overview

- A Property Management Application using Salesforce for helped us business and the project is also based upon depends on the time.
- The application takes into consideration the best management practices, which allows it to consolidate the way in which its team of collaborators works and carry out a more complete and detailed management

1.2 Purpose

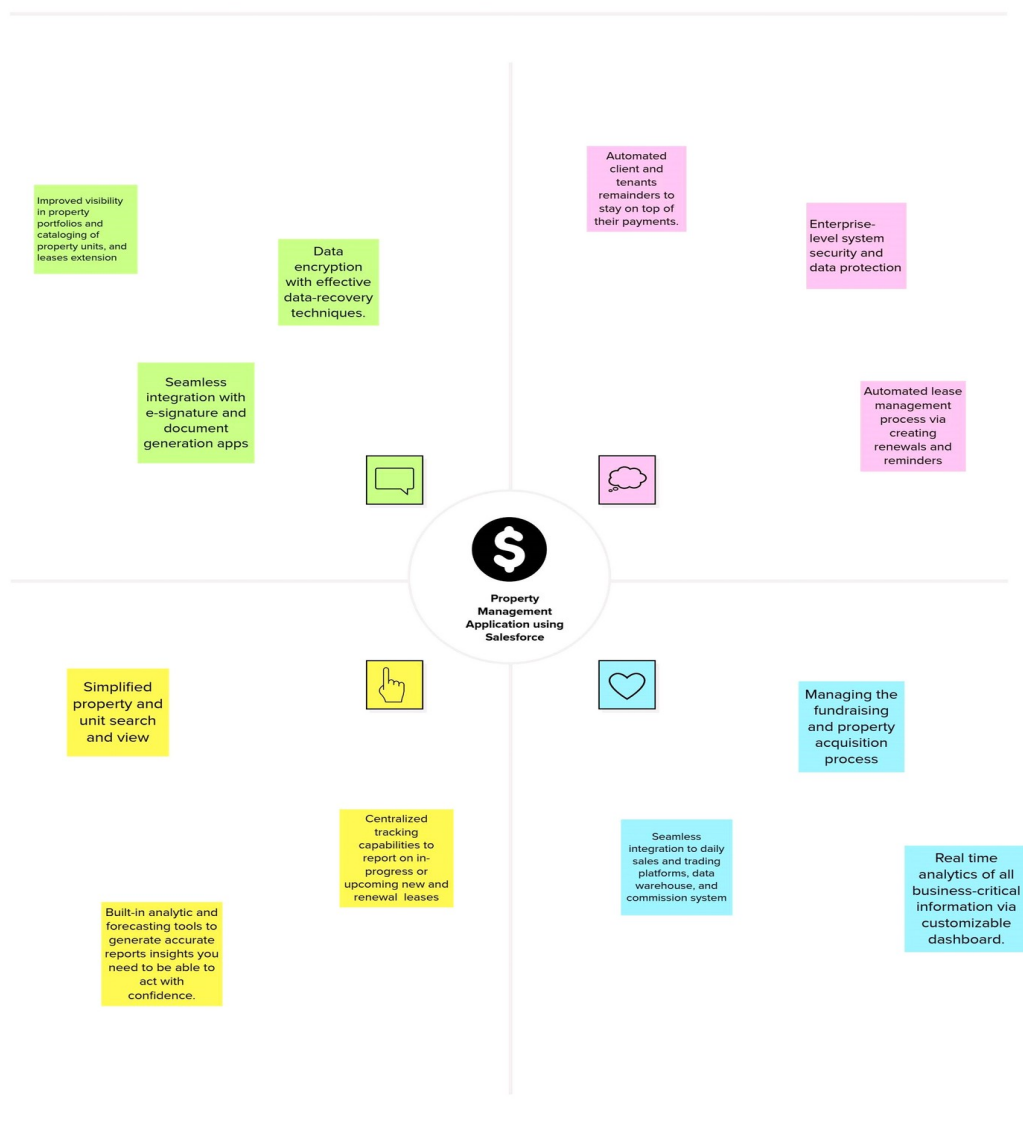
- Tenant Management
- Lease Management
- Maintenance Management
- Accounting and Reporting

2. PROBLEM DEFINITION & DESIGN THINKING



Build empathy

Empathy map for users



2.2 Ideation & Brainstorm Map



Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

🕒 10 minutes to prepare

🕒 1 hour to collaborate

👤 2-8 people recommended

Date	08/04/2023
Team ID and Members	Team ID: NM2023TMID21141 Leader: Dhamodharasamy P Members: Boobalan S Manikenda prabhu M Vesenth B
Project	Property Management Application using Salesforce

💬 Share template feedback



Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

🕒 10 minutes



Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.



Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.



Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#) →



Property Management Application using Salesforce

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕒 5 minutes



Key rules of brainstorming

To run a smooth and productive session



Stay in topic.



Encourage wild ideas.



Defer judgment.



Listen to others.



Go for volume.



If possible, be visual.

3

Group ideas

Property Management Application using Salesforce

Team ideas are shortly presented

🕒 20 minutes

TENANT MANAGEMENT:

Allows property managers to manage tenant information such as lease agreements, rent payments, and move-in/ move-out dates

Maintenance Management:

Enables property managers to track maintenance requests and schedule repairs and inspections

Lease management:

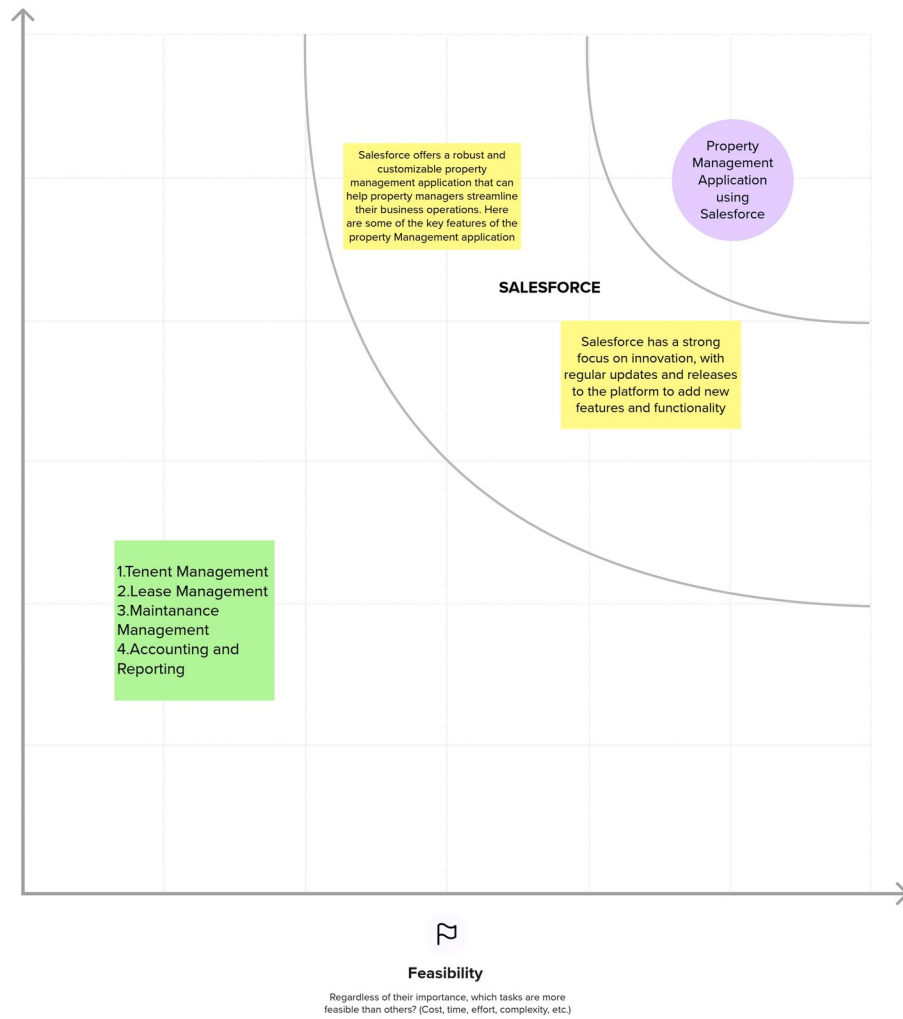
Helps property managers keep track of lease agreements, rent payments, and lease expiration dates

4

Prioritize

Property Management Application using Salesforce project our team make an presentation for priorities in the project.

🕒 20 minutes



3. RESULT

3.1 Data Model

OBJECT NAME	FIELDS IN THE OBJECT	
BUY		
	Field label	Data type
	Buyers	Building
LEAD		
	Field label	Data type
	Leads	Bell
LOAN		
	Field label	Data type
	Loans	Bank
RENT		
	Field label	Data type
	Rents	Building Block

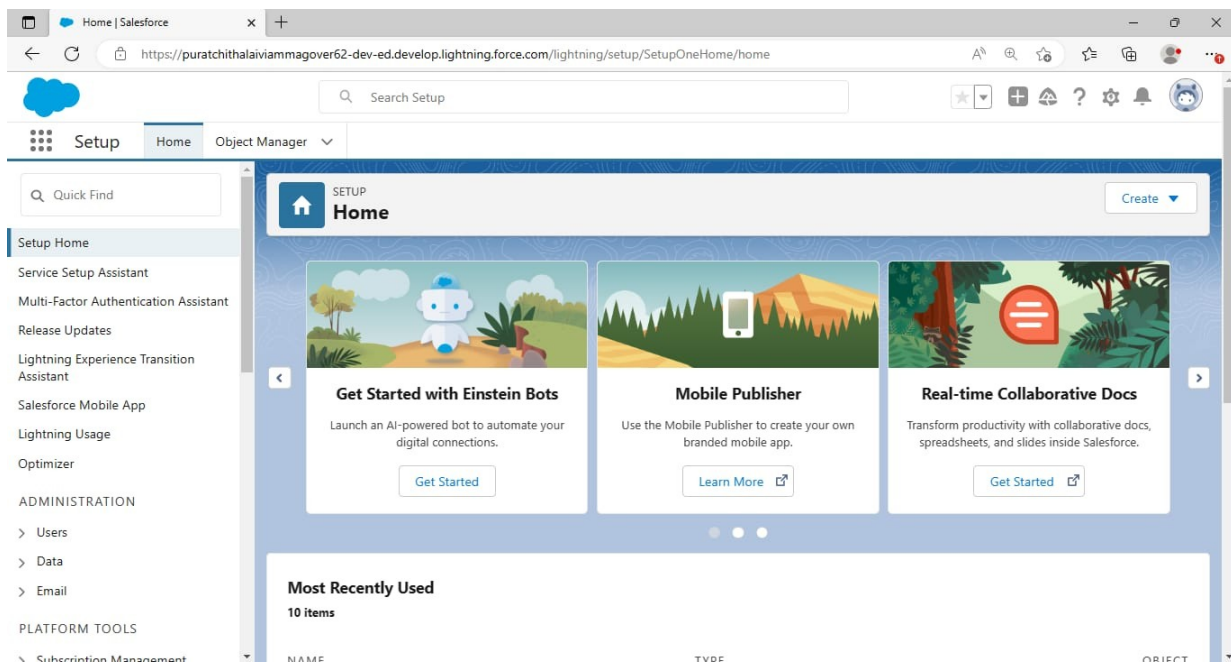
3.2 Activity & Screenshot

Project

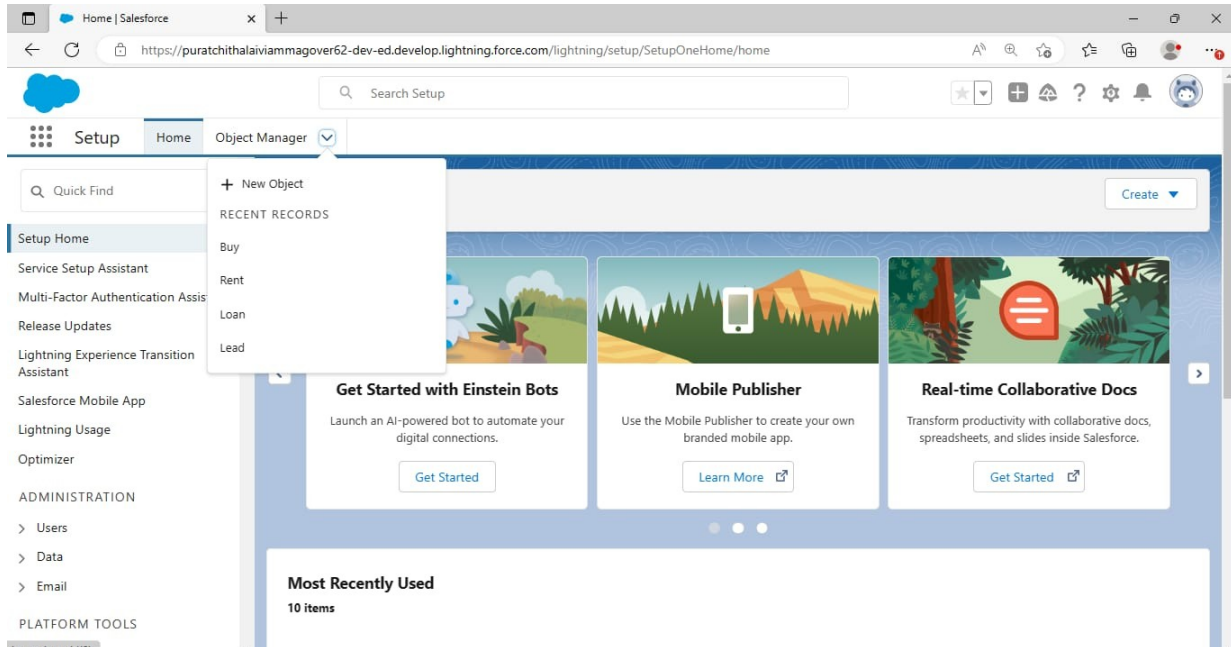
Property Management Application using Salesforce

Activities

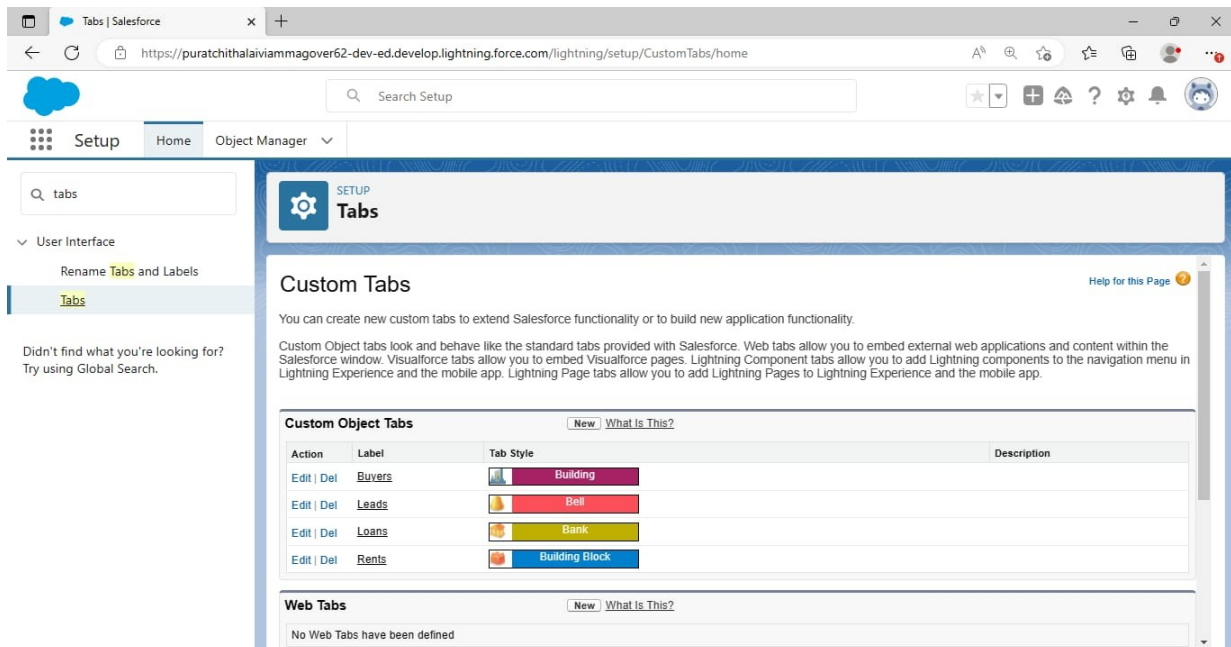
Milestone 1: Creating Developer Account



Milestone 2: Object

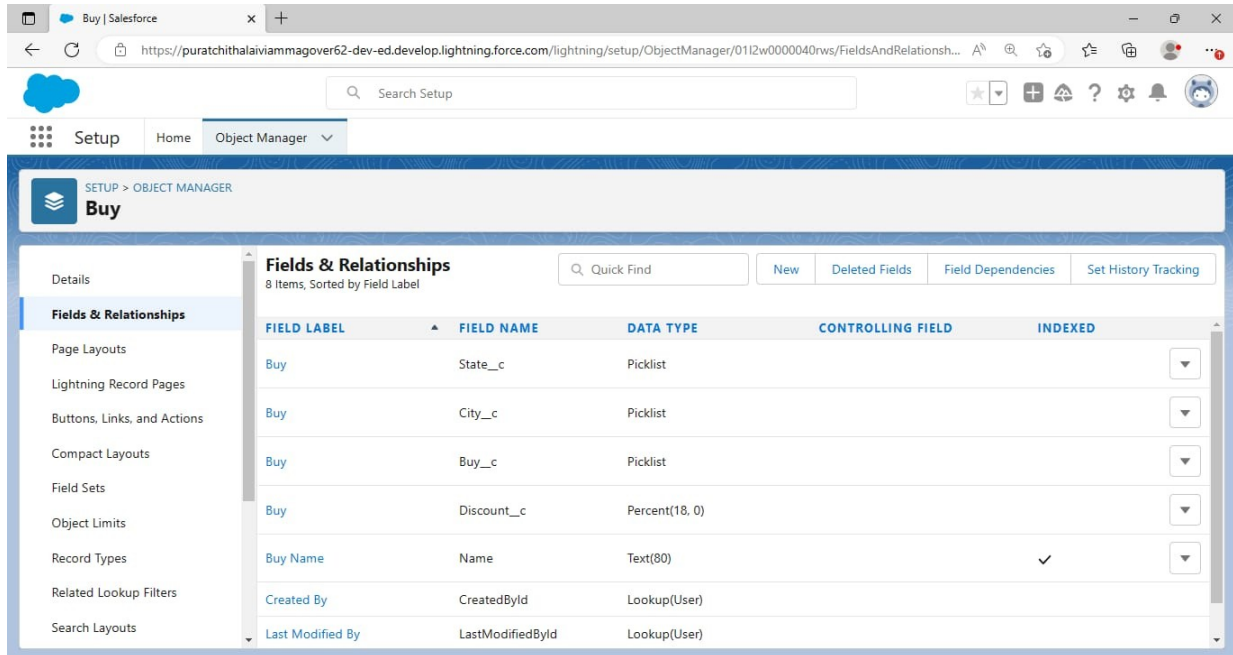


Milestone 3:



Milestone 4:

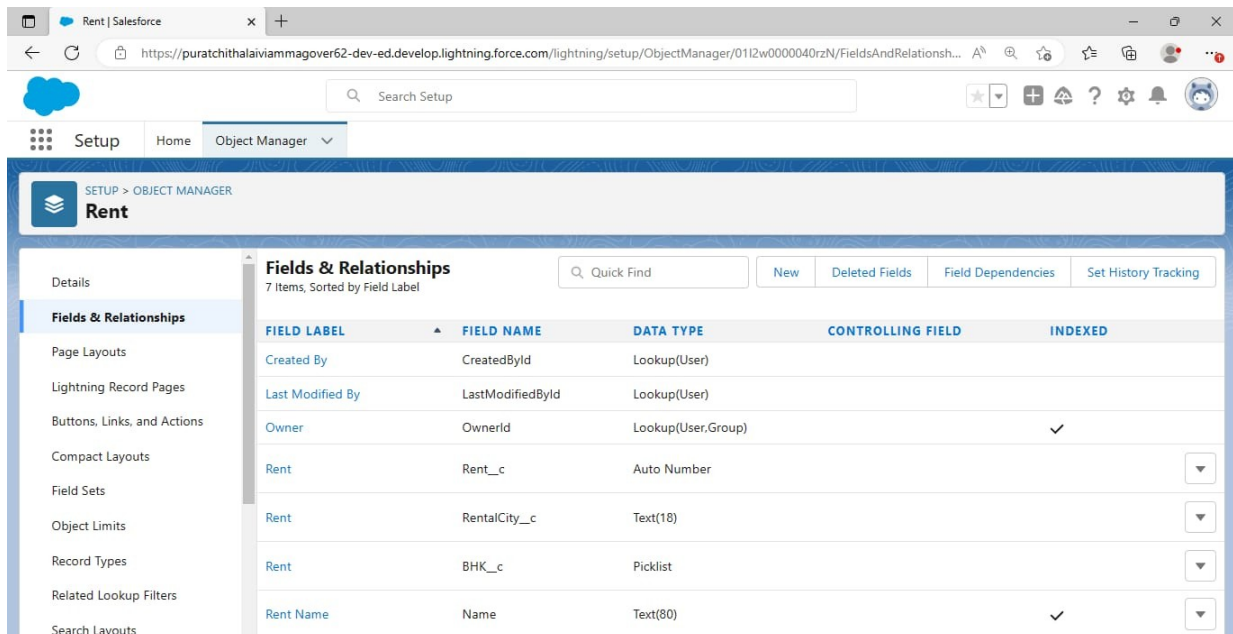
Step 1:



The screenshot shows the Salesforce Setup interface for the 'Buy' object. The left sidebar contains a navigation menu with 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 'Fields & Relationships' and shows 8 items, sorted by Field Label. The table below lists the fields for the 'Buy' object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy	State_c	Picklist		
Buy	City_c	Picklist		
Buy	Buy_c	Picklist		
Buy	Discount_c	Percent(18, 0)		
Buy Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		

Step 2:



The screenshot shows the Salesforce Setup interface for the 'Rent' object. The left sidebar contains a navigation menu with 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 'Fields & Relationships' and shows 7 items, sorted by Field Label. The table below lists the fields for the 'Rent' object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent	Rent_c	Auto Number		
Rent	RentalCity_c	Text(18)		
Rent	BHK_c	Picklist		
Rent Name	Name	Text(80)		✓

Step 3:

Loan | Salesforce

https://puratchithalaiviammagover62-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040rzS/FieldsAndRelationshi...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Loan

Details

Fields & Relationships
11 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan	LoanRepayment__c	Number(18, 0)		
Loan	InterestRate__c	Currency(18, 0)		
Loan	Term__c	Number(18, 0)		
Loan	TotalLoanInstalments__c	Number(18, 0)		
Loan	AnnualLoan__c	Number(18, 0)		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Step 4:

Lead | Salesforce

https://puratchithalaiviammagover62-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040rwi/FieldsAndRelationshi...

Search Setup

Setup Home Object Manager

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
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lead	Phone__c	Phone		
Lead	Lead__c	Auto Number		
Lead	state__c	Picklist		
Lead	City__c	Picklist (Multi-Select)		
Lead	Email__c	Email		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Milestone 5:

Profiles

[All Profiles](#) | [Edit](#) | [Delete](#) | [Create New View](#)

[New Profile](#)

Action	Profile Name	User License	Custom
Edit Clone	Identity User	Identity	<input type="checkbox"/>
Edit Del ...	Marketing Manager	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
Edit Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
Edit Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
Edit Clone	Partner Community User	Partner Community	<input type="checkbox"/>
Edit Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Sales Manager	Salesforce	<input checked="" type="checkbox"/>

29-42 of 42 | 0 Selected | [Previous](#) [Next](#) | Page 2 of 2

Milestone 6:

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](#)

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

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	B. VASANTH	VB	vasanthkalam@gascoldm.ac.in		<input checked="" type="checkbox"/>	System Administrator
Edit	Chatter Expert	Chatter	chattv.00d2w00000r0siceab.e01ufcvuozl@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	DHONI MAHENDRA SINGH	MSD	msd@thala07@gmail.com		<input checked="" type="checkbox"/>	Custom: Support Profile
Edit	User Integration	integ	integration@00d2w00000r0siceab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insighisecurity@00d2w00000r0siceab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

Milestone 7:

Permission Sets | Salesforce

https://puratchithalaiviammagover62-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

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

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see product...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access t...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service ...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that ...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice cont...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice...	Service Cloud Voice User

1-25 of 26 0 Selected Previous Next Page 1 of 2

Milestone 8:

Sharing Settings | Salesforce

https://puratchithalaiviammagover62-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fown%2FOrgS...

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

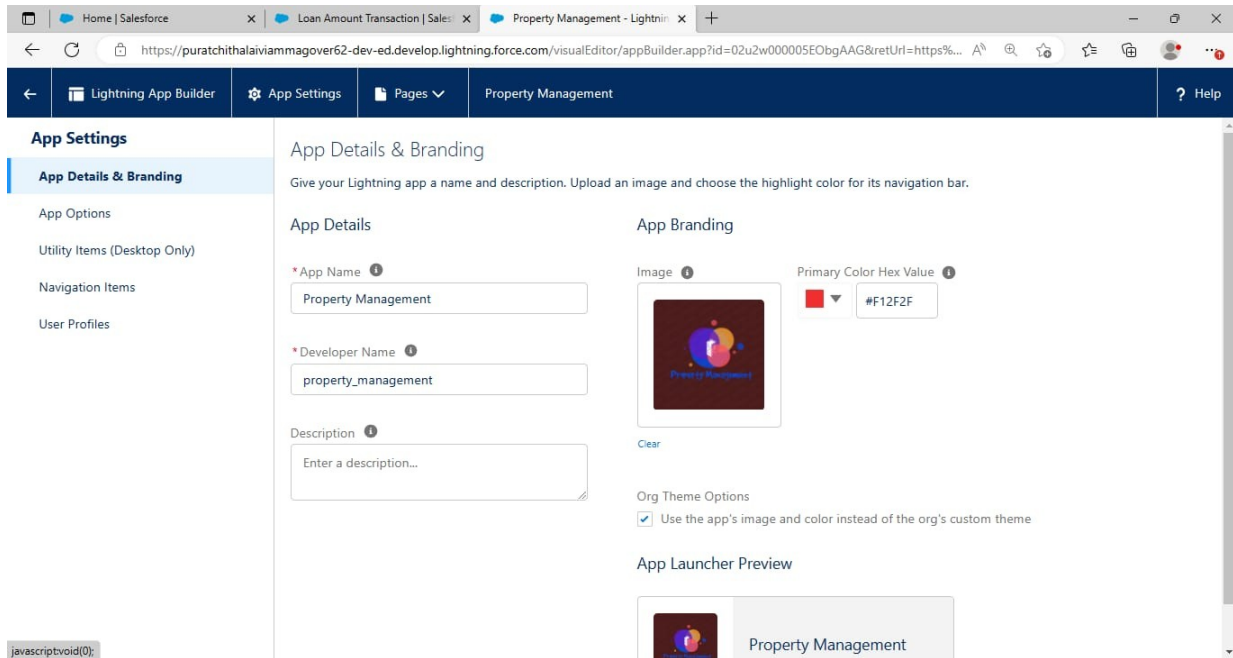
[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

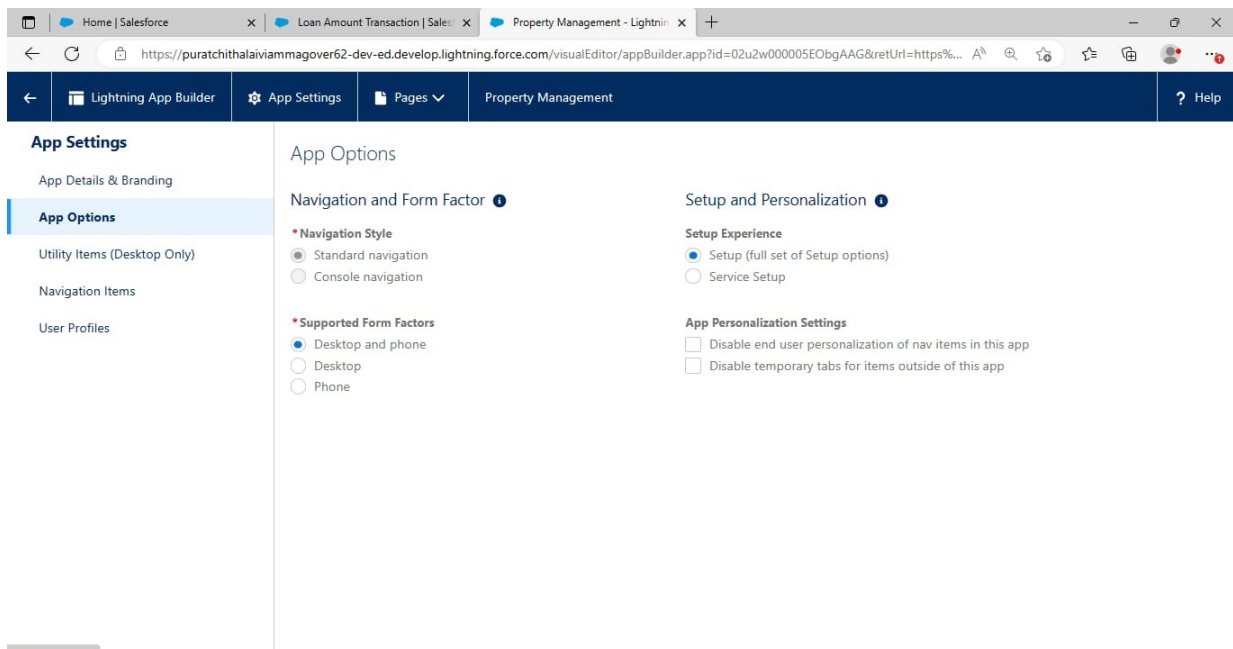
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓

Milestone 9:

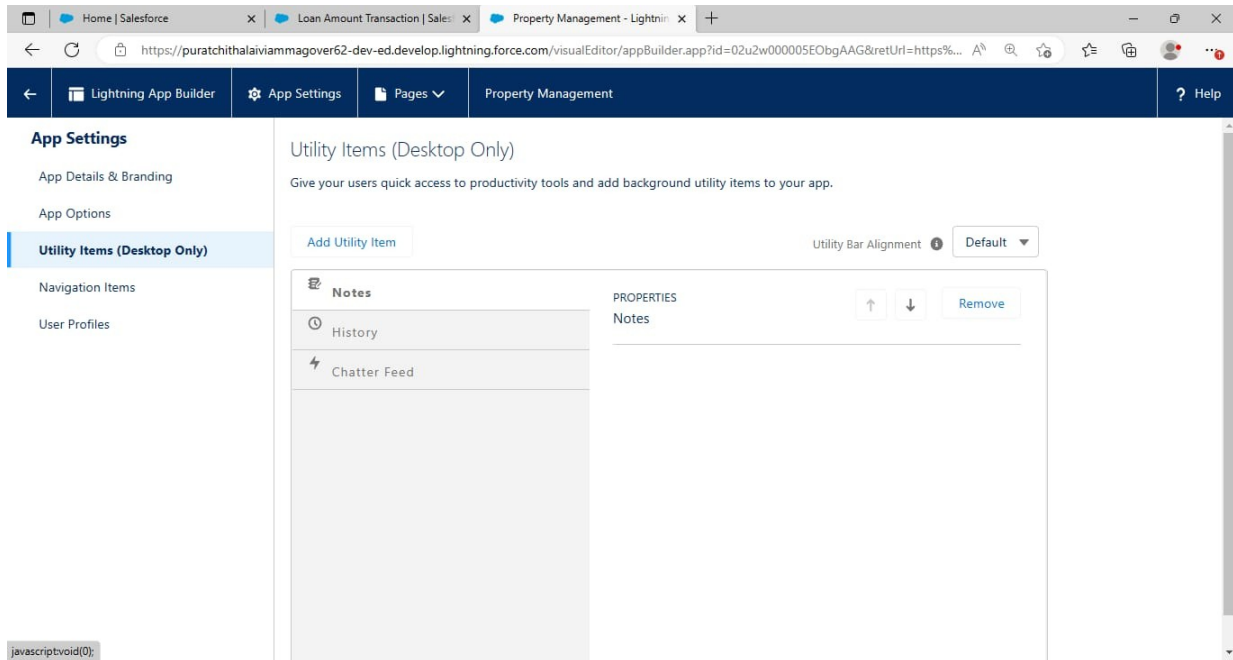


Milestone 10:

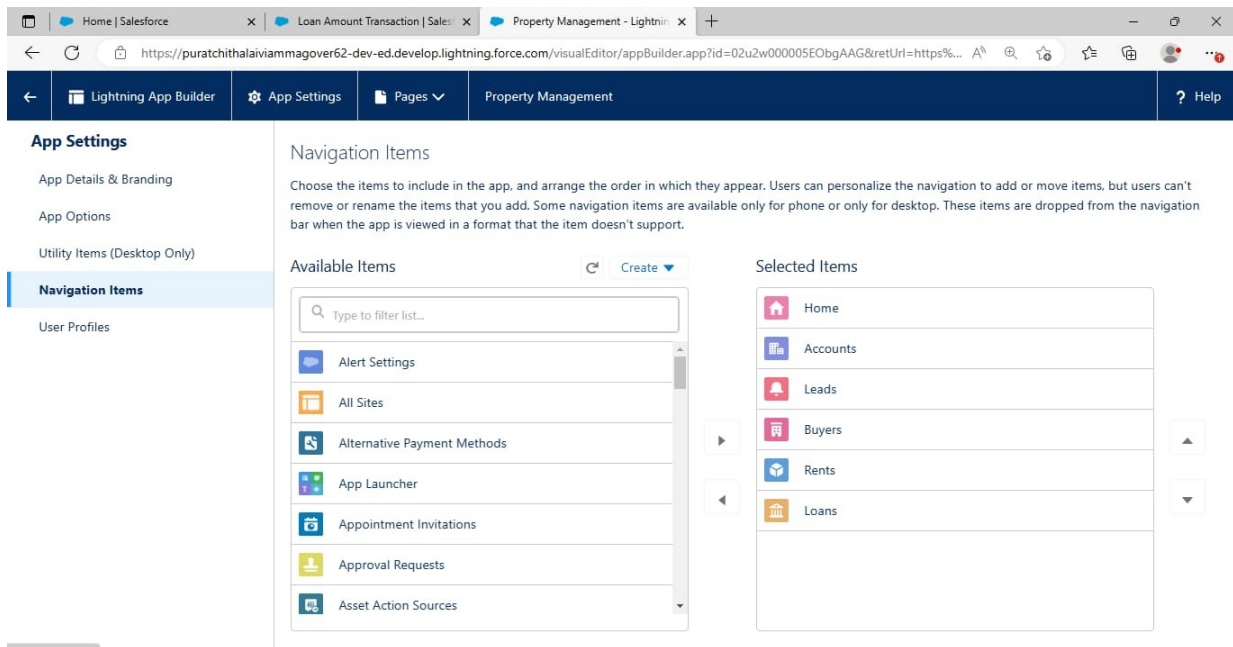
Step 1:



Step 2:



Step 3:



Step 4:

Home | Salesforce x Loan Amount Transaction | Sales x Property Management - Lightning x

https://puratchithalaiviammagover62-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000005EObgAAG&retUrl=https%... A Q Y 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 0 1 2 3 4 5 6 7 8 9

Lightning App Builder App Settings Pages Property Management ? Help

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles**

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Customer Community Login User

Selected Profiles

- System Administrator
- Custom: Support Profile

javascript:void(0);

Milestone 10:

Home | Salesforce x New Lead With Loan Report | Sales x

https://puratchithalaiviammagover62-dev-ed.develop.lightning.force.com/lightning/r/Report/0002w00000ESxAoEAL/view A Q Y 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 0 1 2 3 4 5 6 7 8 9

Property Managem... Home Accounts Leads Buyers Rents Loans New Lead With Loan Report More

Report: Accounts
New Lead With Loan Report
LoanAmount >=to 5000\$

Enable Field Editing Add Chart Edit

Total Records
12

	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date	Last Activity	management
1	VASANTH B	Dickenson plc	KS	Customer - Channel	-	19/03/2023	-	VASANTH B
2	VASANTH B	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	19/03/2023	-	VASANTH B
3	VASANTH B	Express Logistics and Transport	OR	Customer - Channel	Cold	19/03/2023	-	VASANTH B
4	VASANTH B	University of Arizona	AZ	Customer - Direct	Warm	19/03/2023	-	VASANTH B
5	VASANTH B	United Oil & Gas Corp.	NY	Customer - Direct	Hot	19/03/2023	-	VASANTH B
6	VASANTH B	sForce	CA	-	-	19/03/2023	-	VASANTH B
7	VASANTH B	GenePoint	CA	Customer - Channel	Cold	19/03/2023	-	VASANTH B
8	VASANTH B	United Oil & Gas, UK	UK	Customer - Direct	-	19/03/2023	-	VASANTH B
9	VASANTH B	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	19/03/2023	-	VASANTH B

History Chatter Feed

Milestone 11:

Home | Salesforce x Loan Amount Transaction | Sales x

https://puratchithalaiviammagover62-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000KaXLEA0/view?queryScope=userF...

Search...

Property Managem... Home Accounts Leads Buyers Rents Loans Loan Amount Transaction More

Dashboard
Loan Amount Transaction
As of 14-Apr-2023, 3:55 pm Viewing as VASANTH B

Refresh Edit Subscribe

total number of loan passed

Last Activity ↑	Account Owner	Account Name	Billing State/Province	Type
	- VASANTH B	Dickenson plc	KS	Customer - Channel
	- VASANTH B	Grand Hotels & Resorts Ltd	IL	Customer - Direct
	- VASANTH B	Express Logistics and Transport	OR	Customer - Channel
	- VASANTH B	University of Arizona	AZ	Customer - Direct
	- VASANTH B	United Oil & Gas Corp.	NY	Customer - Direct
	- VASANTH B	sForce	CA	-
	- VASANTH B	GenePoint	CA	Customer - Channel

View Report (New Lead With Loan Report)

History Chatter Feed

4. TRAILHEAD PROFILE PUBLIC URL

1. Team Lead - <https://trailblazer.me/id/d20uma012>

2. Team Member 1- <https://trailblazer.me/id/vasab7>

3. Team Member2-<https://trailblazer.me/id/manim130>

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

5. ADVANTAGE & DISADVANTAGE

❖ ADVANTAGE

- There are many report widgets available to examine a company's performance from various angles. Salesforce allows for fast customization of a wide range of business processes and sectors
- Because Salesforce is hosted in the cloud, you can take your business with you wherever you go. As a result, Organizations require fewer resources in the office to manage their operations.
- Each employee may log into the CRM from anywhere in the world and contribute to the company's overall productivity.
- There is no need to download any program. There are no system requirements as well. Salesforce gives you a once-in-a-lifetime opportunity to operate your business in only a few days. The use of the cloud allows for real-time data access and improves corporate productivity by reducing reaction time.
- You can keep track of your employees' activities. You can quickly combine all of your activities and receive a clear

multidimensional image of your progress, the status of planned and accomplished tasks, and share the information with the appropriate workers.

❖ **DISADVANTAGE**

- ◆ Pricing is also important, especially for small enterprises. If you prefer third-party solutions or wish to customize, keep in mind that there may be extra charges.
- ◆ Small business without a dedicated sales or marketing staff may not require a system as extensive and powerful as Salesforce. It might be intimidating for a company that does not require such a tool.
- ◆ It's no secret that each update or version can significantly change the layout of the dashboard or the arrangement of the tabs. As a result, the administration for users might become a nightmare since certain well-known functionality can become difficult to find.

APPLICATION

- Automated Posting
- Rent Roll Format
- Tenant Communications
- Online Tenant Portal
- Online Tenant Application

CONCLUSION

Get a quick overview of what's going on in your team. See when a colleague logs a call or sends a quote. Share ideas and files in real-time and catch-up on things you misses when you where away.

FUTURE SCOPE

- Retail Manager
- Merchandise Manager
- Store Manager
- Retail Buyer
- Warehouse Management
- Brand Manager
- Merchandiser Manager
- Image Promoter
- Customer Care Executives