Project Report

PROJECT TITLE: PROPERTY MANAGEMENT APPLICATION USING SALEFORCE

1 INTRODUCTION

1.1 Overview

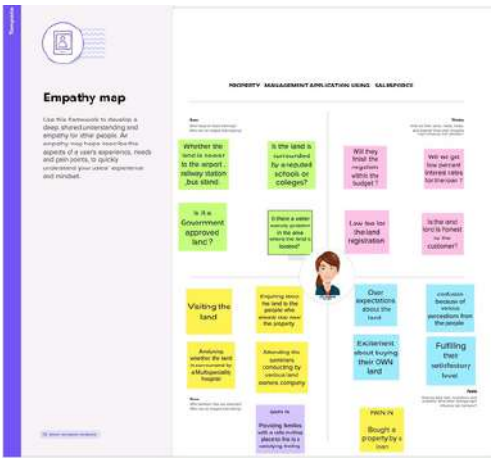
Salesforce Property Management, a cloud-based CRM tool helps to the buyer for tracking different information about residential and commercial properties. It handles details for rent and loan of the property. Produce financial reports with detailed statistical analysis.

1.2 Purpose

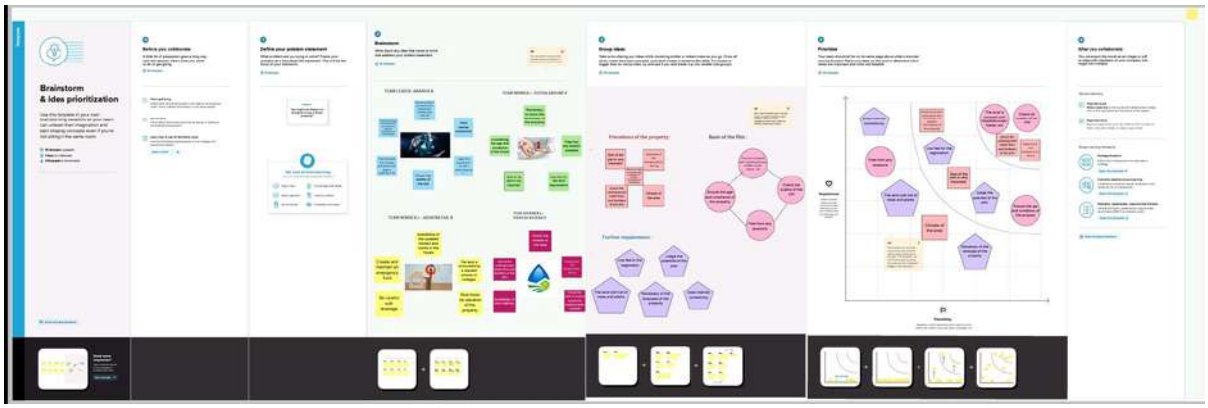
Property management is the daily oversight of residential, commercial or industrial real estates by a customer. The purpose of developing a app is to draw the attention of users and make the buying or selling process smoother.

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map;



2.2 Ideation & Brainstorming Map



3.1 Data Model:

Object Name	Fields in the object
Lead	Field label: Alagar — Data type: Email Field label: **City** — Data type: Picklist
	Field label: **Ajith** — Data type: Phone Field label: Deva — Data type: Auto number
	Field label: **State** — Data type: Picklist

Object Name	Fields in the object
Buy	Field label: **Annual Amount** — Data type: Currency Field label: Balaji — Data type: Picklist
	Field label: Discount — Data type: Percentage Field label: **State** — Data type: Picklist Field label: **City** — Data type: Picklist

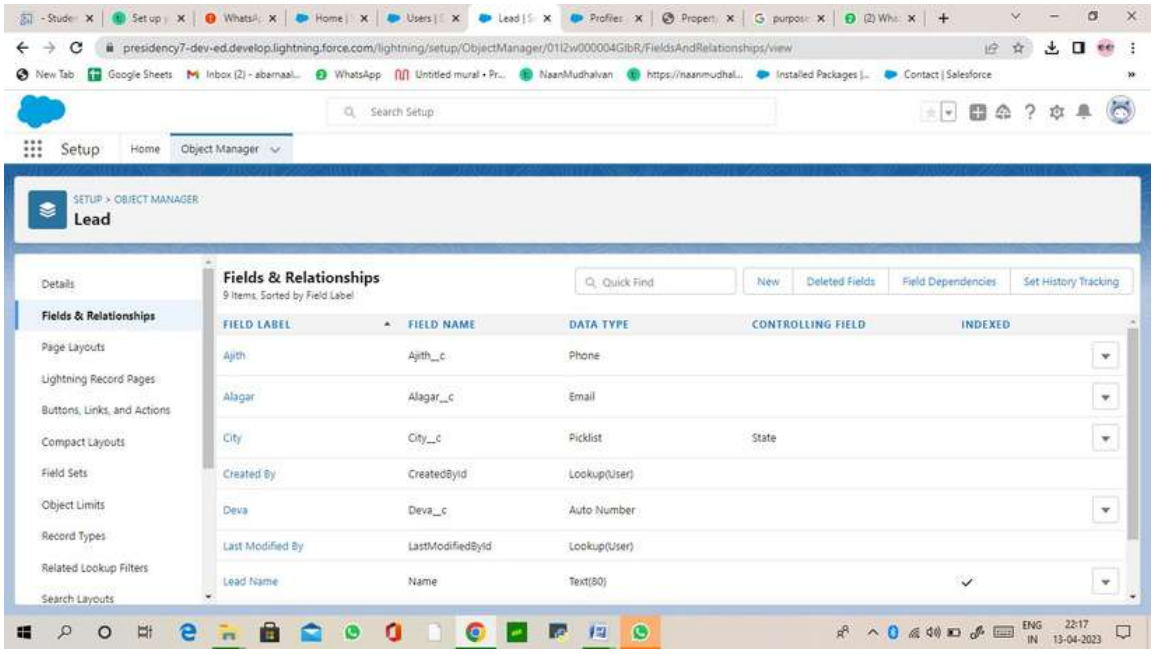
3.1 Data Model:

Object Name	Fields in the object
Rent	Field label: BHK — Data type: Picklist Field label: Rent — Data type: Autonumber
	Field label: Saidapet — Data type: Text Field label: — Data type:

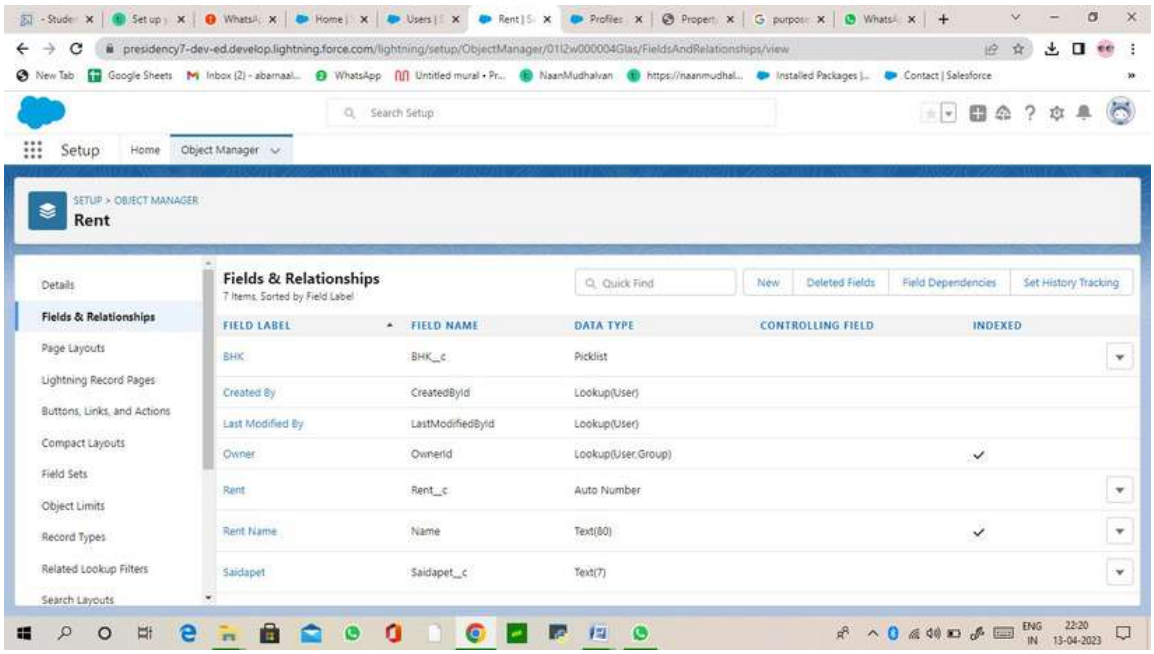
Object Name	Fields in the object
Loan	Field label: **Annual loan** — Data type: Number Field label: Cash — Data type: Formula
	Field label: Interest rate — Data type: Currency Field label: Loan amount — Data type: **Formula**
	Field label: Loan id — Data type: Autonumber Field label: Loan repayment — Data type: Number
	Field label: Term — Data type: **Number** Field label: Total loan installment — Data type: Number

3.2 Activity & Screenshot

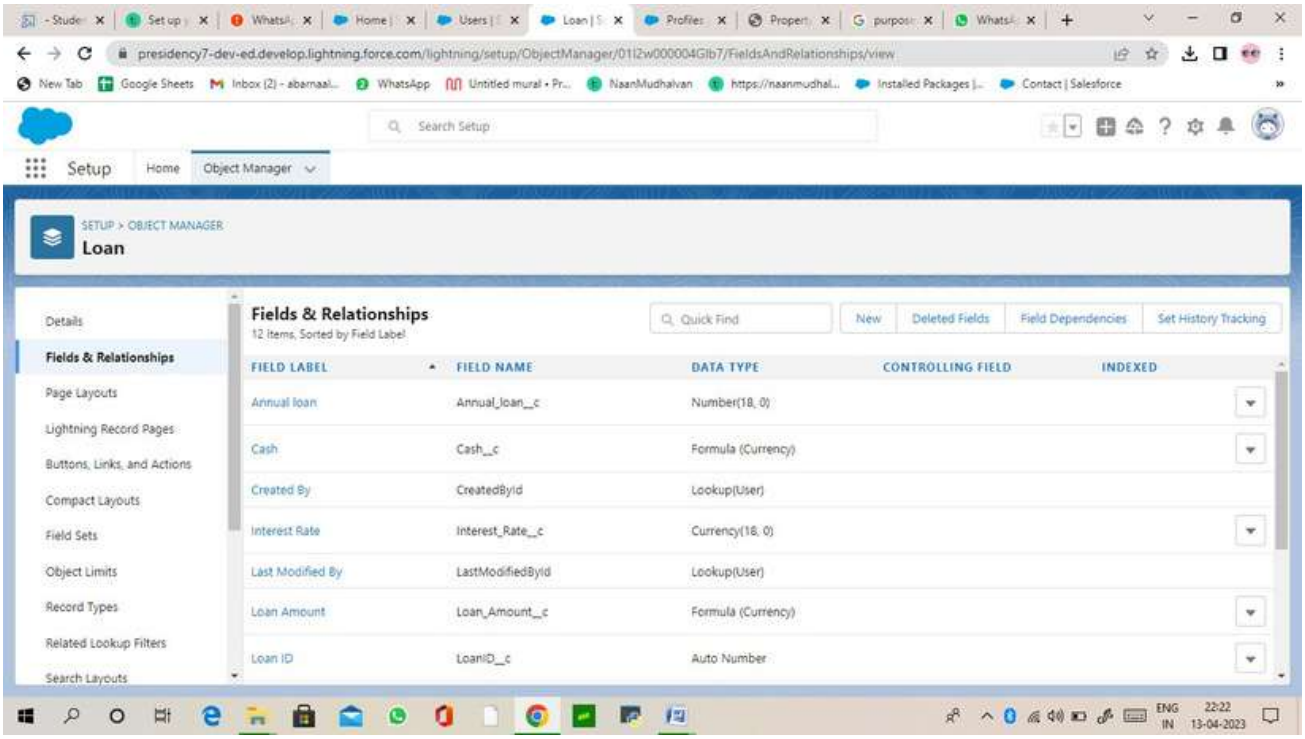
Lead:



Rent:



LOAN: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Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Loan
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
Fields & Relationships
12 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Annual loan
Annual_loan__c
Number(18, 0)
Cash
Cash__c
Formula (Currency)
Created By
CreatedById
Lookup(User)
Interest Rate
Interest_Rate__c
Currency(18, 0)
Last Modified By
LastModifiedById
Lookup(User)
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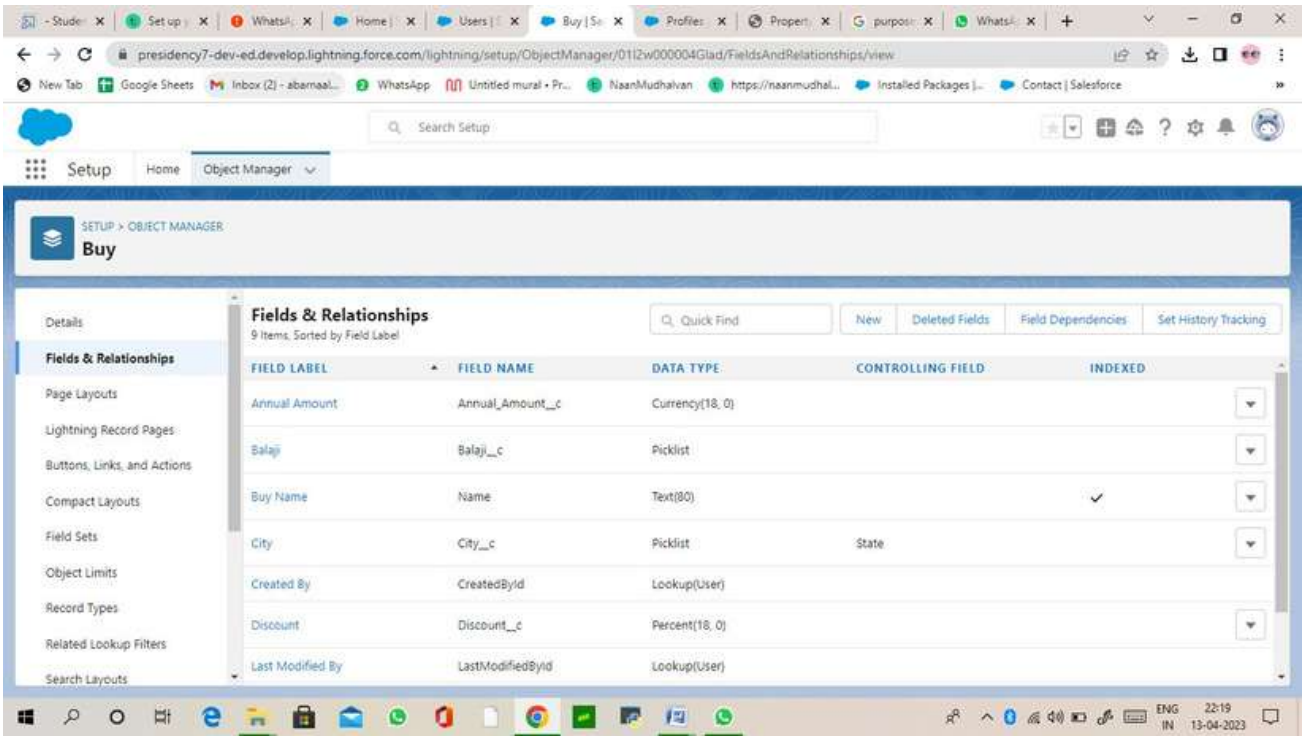
Formula (Currency)
Loan ID
LoanID__c
Auto Number

BUY:


presidency7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000004Glad/FieldsAndRelationships/view
Setup
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Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Annual Amount
Annual_Amount__c
Currency(18, 0)
Balaji
Balaji__c
Picklist
Buy Name
Name
Text(80)
City
City__c
Picklist
State
Created By
CreatedById
Lookup(User)
Discount
Discount__c
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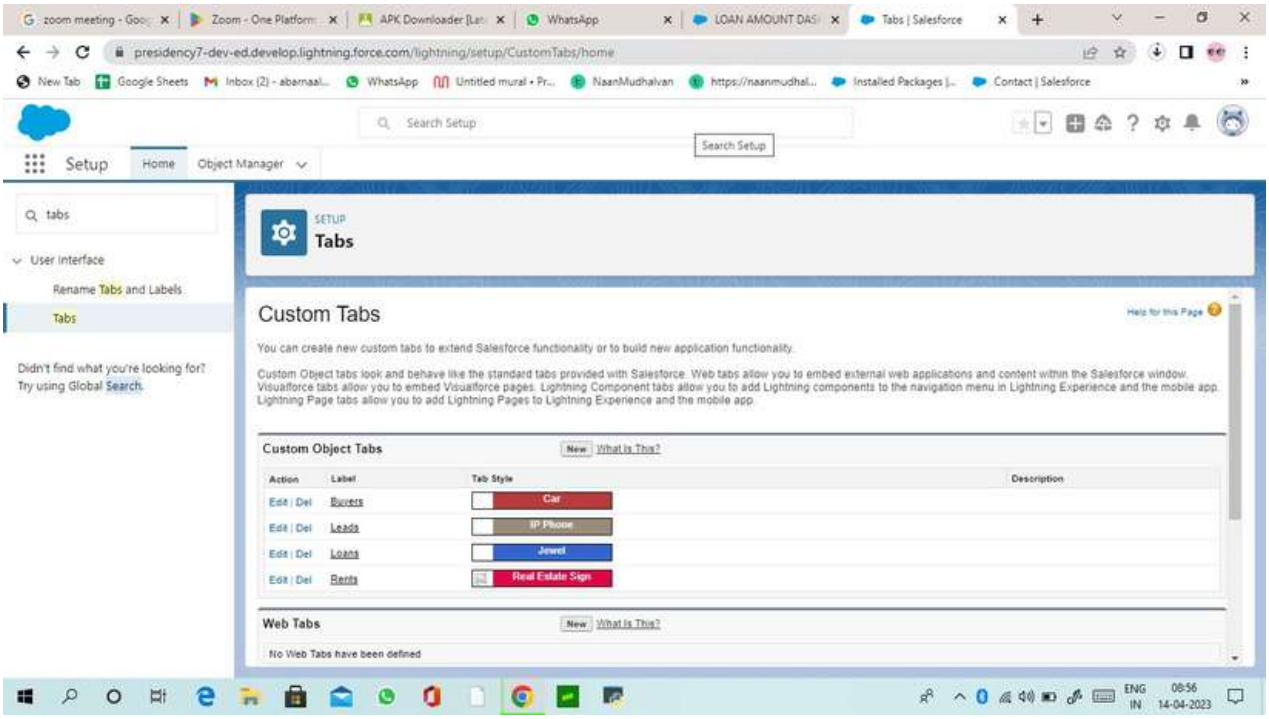
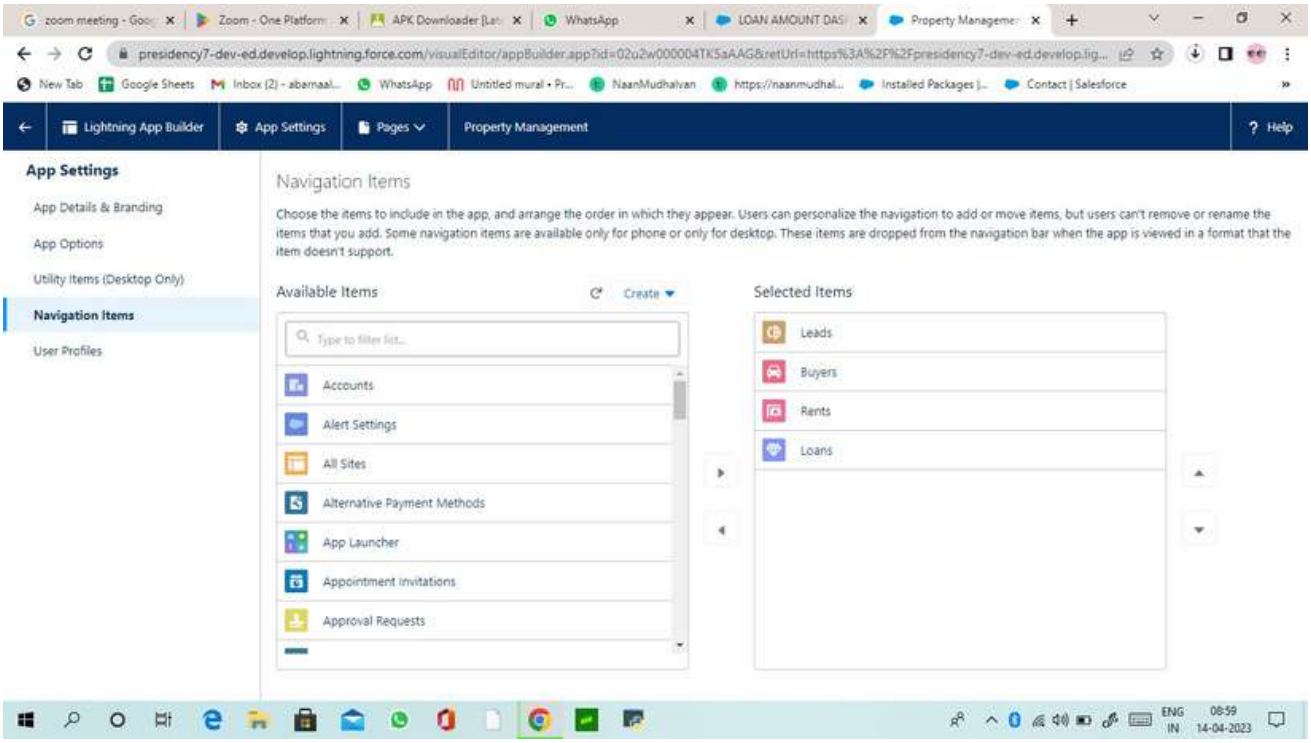
Last Modified By
LastModifiedById
Lookup(User)

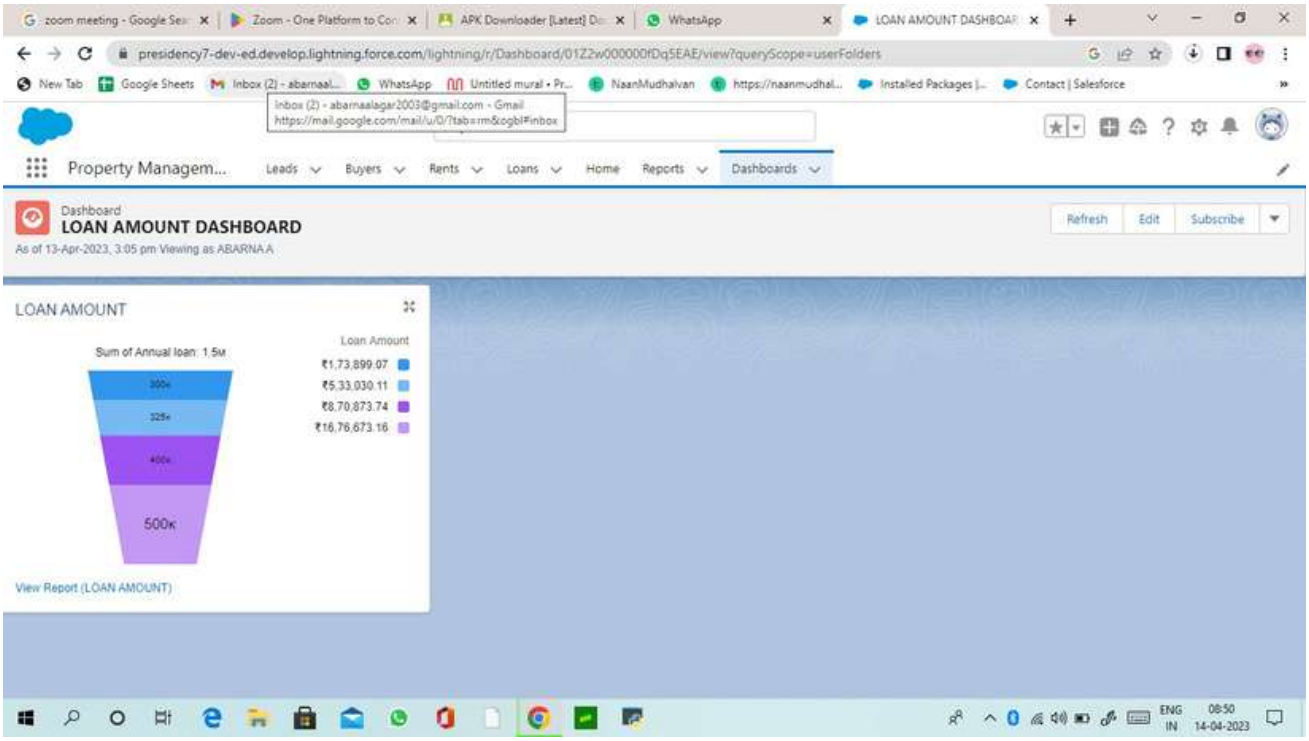
TABS:



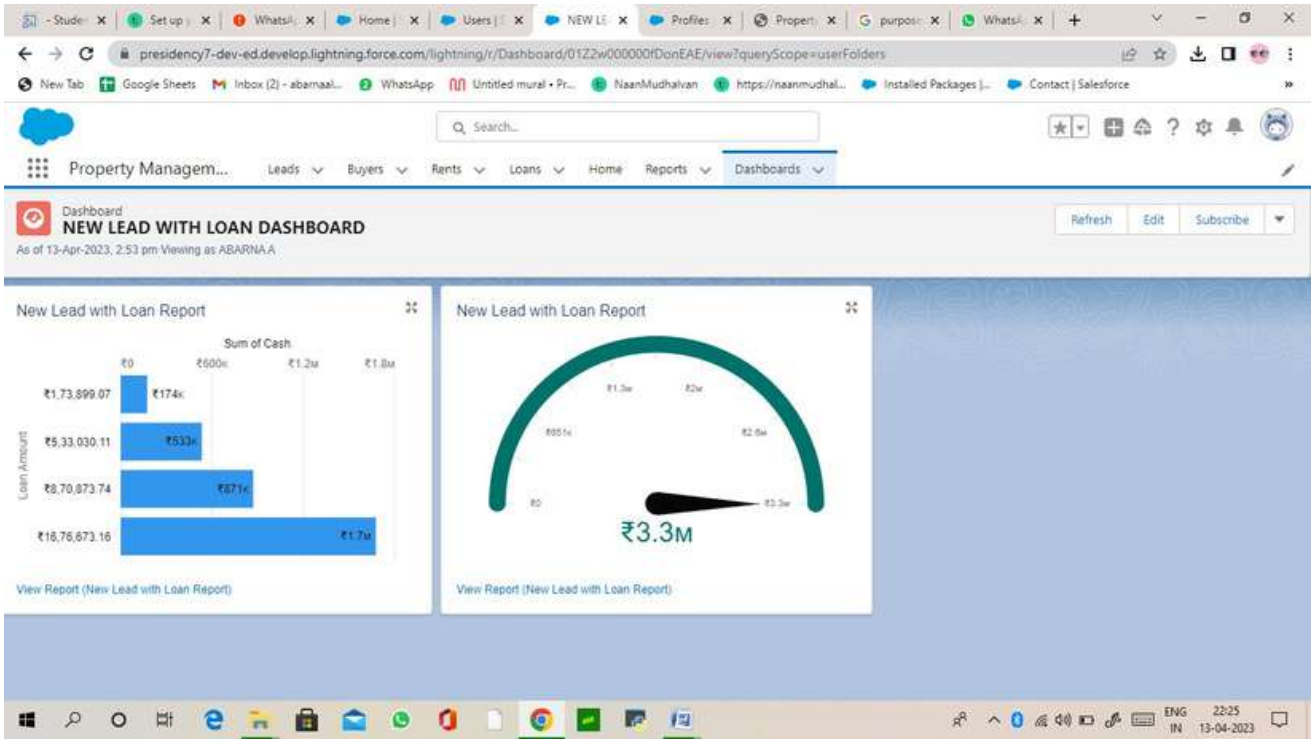
LIGHTNING APP BUILDER:



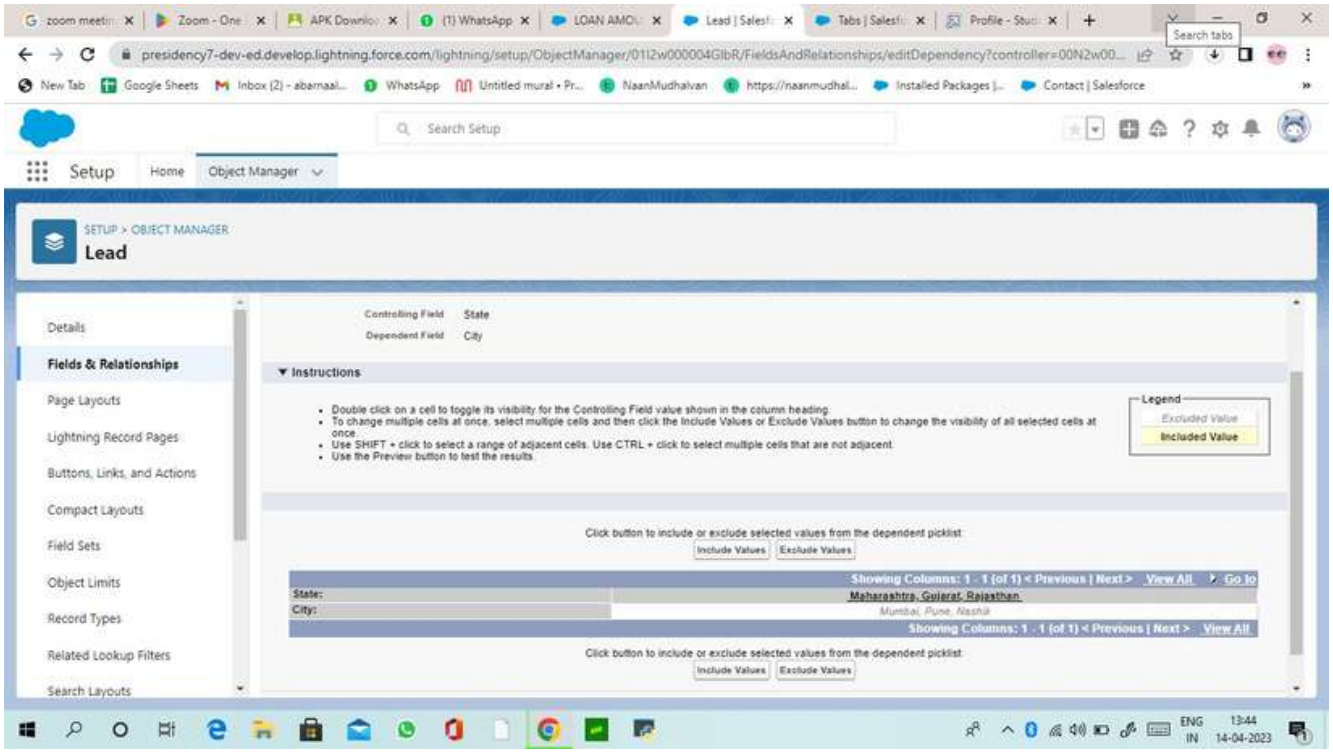
LOAN AMOUNT DASHBOARD:



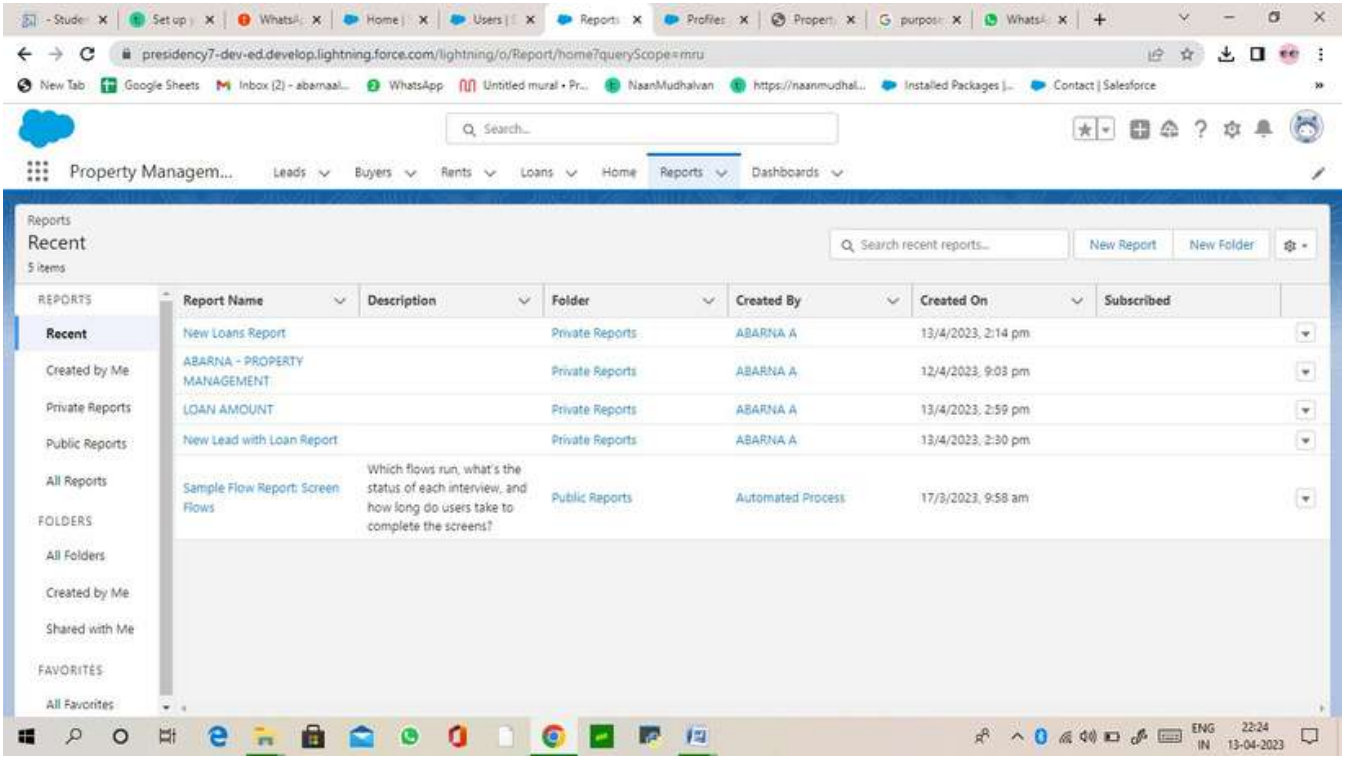
NEW LEAD WITH LOAN DASHBOARD:



LEAD FIELD DEPENDENCIES:



REPORT:



4 Trailhead Profile Public URL

Team leader - https://trailblazer.me/id/abara310

Team member1 - https://trailblazer.me/id/jayak134

Team member 2 - https://trailblazer.me/id/vkumagsjfsgs

Team member 3 - https://trailblazer.me/id/deepv53

5 ADVANTAGES

1) The Property Management Application where Buyer can order his Requirements and get the Appropriate Details of the Property.
2) According to the customer's interest , It provides some discounts upto what extent they can get the discount. Also Track Whether they are interested in taking the loan available for so just calculate how much loan Amount user can get it.
3) Provide the Security for two different profiles like for marketing and sales team

DISADVANTAGES

1. Investment time & efforts to analyze and adapt to use CRM in a daily routine for property management .
2. Shortcomings in the current PRM process after CRM implementation (transition from manual processes to CRM)
3. The expense of a Property management CRM could be a constraint (compel/force)
4. Prepare to educate the employees on how to use property management CRM and it may take extra effort for them.
5. Ensuring a responsible Person for Property CRM adaptation avoids the hassles or else there could be a failure in adopting the property CRM.

6 APPLICATIONS

Property management systems make it easier for coordinating the functions of the sales, planning, and reporting. Having clear lines of communication between all departments of the property, and with the guest is integral to a successful accommodation. With this system, buyer can facilitate easy communication, and ensure that all departments are operating efficiently and effectively.

7 CONCLUSION

By knowing the exact lead status like cold, warm or hot, and managing FUTURE follow-ups and interactions while looking for a property and Mapping all the interactions & conversions to know the prospect revenue & improvement in lead (customer) conversion rates hence it has a prominent role (Scope)in FUTURE.

8 FUTURE SCOPE

Property management application helps the entire lifecycle of a potential customer. we can track and store the data that’s important to the operations, all in one easy-to-access place.Therefore it has a wide scope in Future.