

1 INTRODUCTION

1.1 Overview

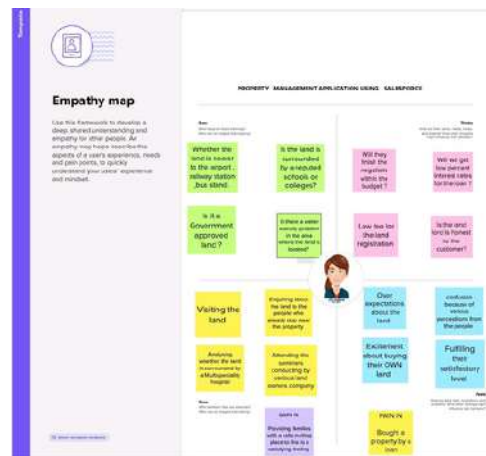
Salesforce Property Management, a cloud-based CRM tool helps to the buyer for tracking different information about residential and commercial properties. It handles details for rent and loan of the property. Produce financial reports with detailed statistical analysis.

1.2 Purpose

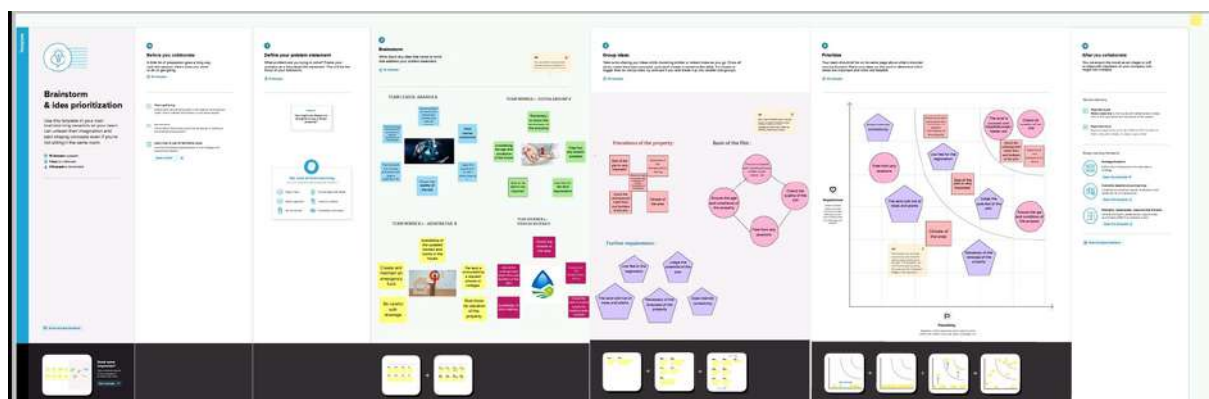
Property management is the daily oversight of residential, commercial or industrial real estates by a customer. The purpose of developing a app is to draw the attention of users and make the buying or selling process smoother.

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	Data type
	Alagar	Email
	City	Picklist
	Field label	Data type
	Ajith	Phone
	Deva	Auto number
	Field label	Data type
	State	Picklist

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

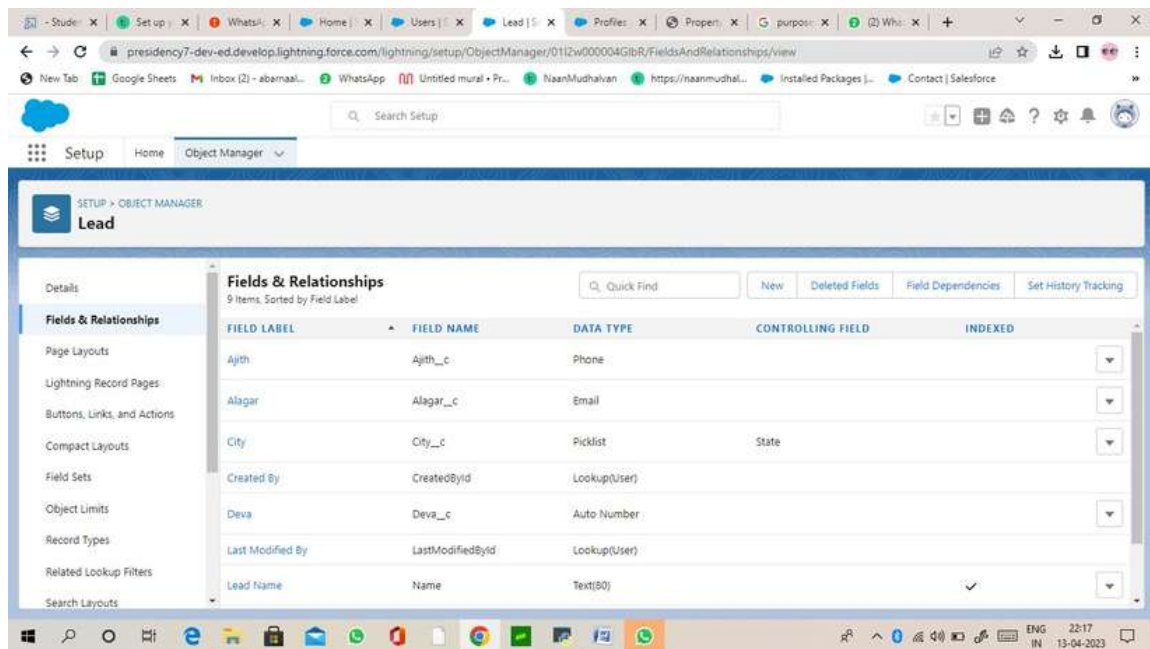
3.1 Data Model:

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

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

3.2 ACTIVITY & SCREENSHOT

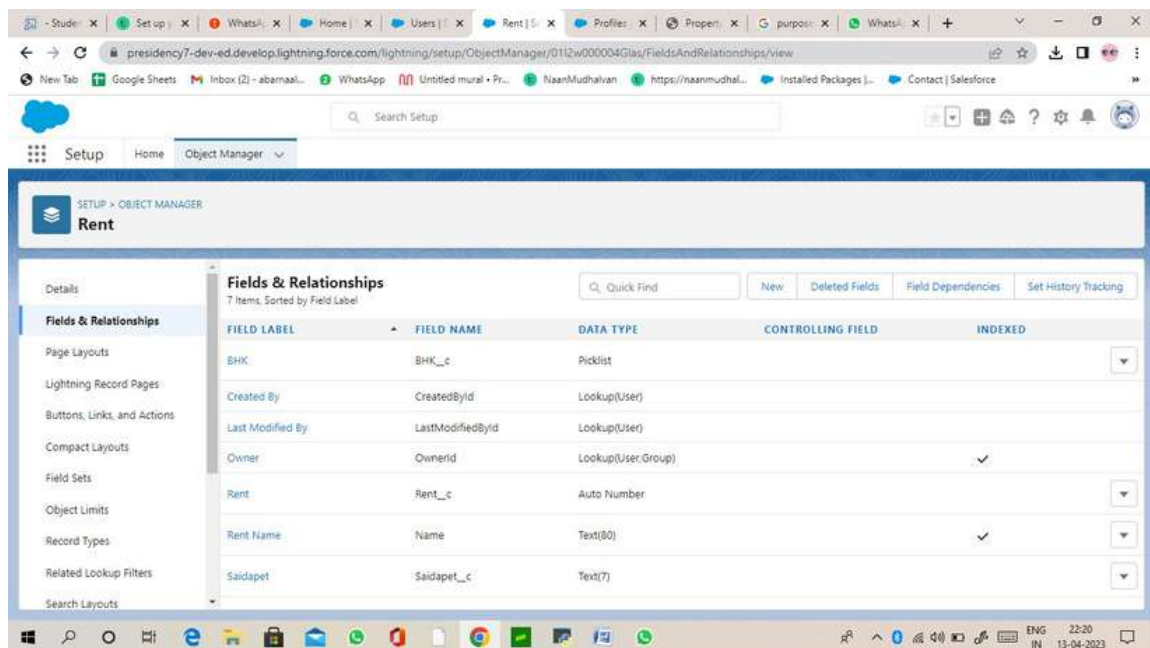
LEAD:



The screenshot shows the Salesforce Setup interface for the 'Lead' object. The 'Fields & Relationships' section is active, displaying a list of 9 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Ajith	Ajith__c	Phone		
Alagar	Alagar__c	Email		
City	City__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Deva	Deva__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Lead Name	Name	Text(50)		✓

RENT:



The screenshot shows the Salesforce Setup interface for the 'Rent' object. The 'Fields & Relationships' section is active, displaying a list of 7 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK	BHK__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent	Rent__c	Auto Number		
Rent Name	Name	Text(50)		✓
Saidapet	Saidapet__c	Text(7)		

LOAN:

Screenshot of the Salesforce Setup page for the 'Loan' object. The page shows the 'Fields & Relationships' section with 12 items, sorted by Field Label. The table lists fields such as Annual loan, Cash, Created By, Interest Rate, Last Modified By, Loan Amount, and Loan ID, along with their data types and controlling fields.

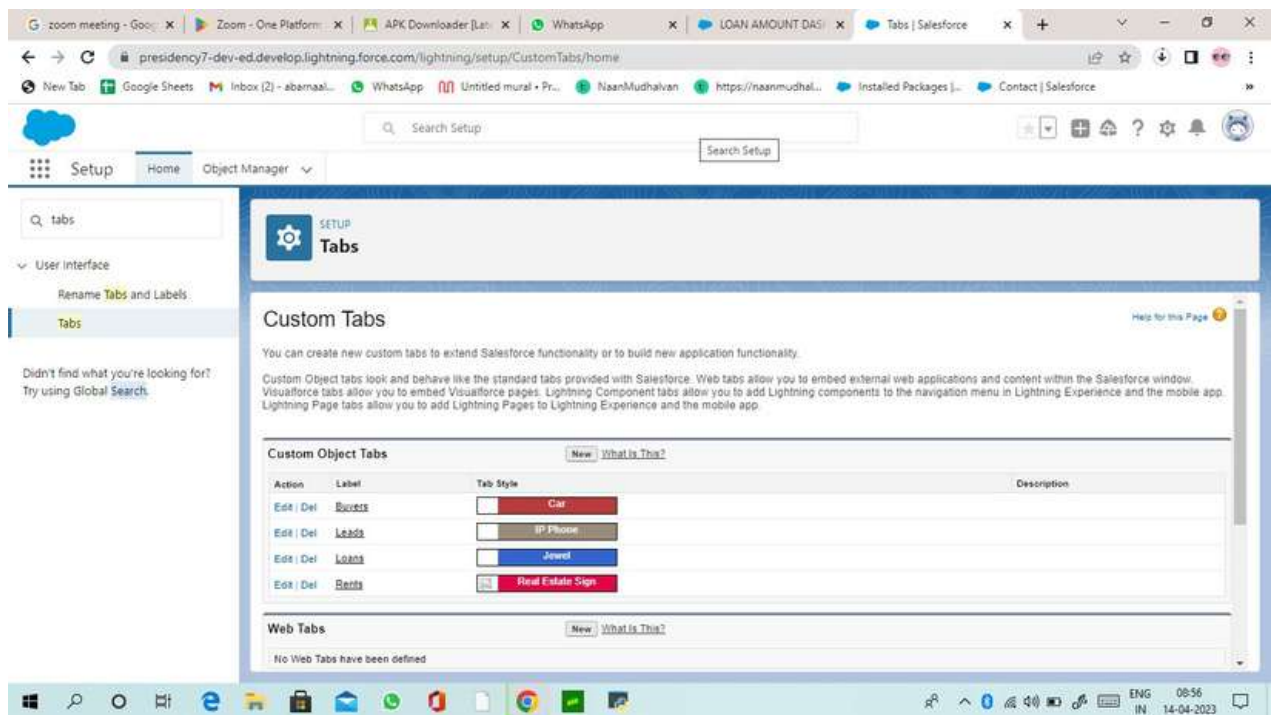
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual loan	Annual_loan__c	Number(18, 0)		
Cash	Cash__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan ID	LoanID__c	Auto Number		

BUY:

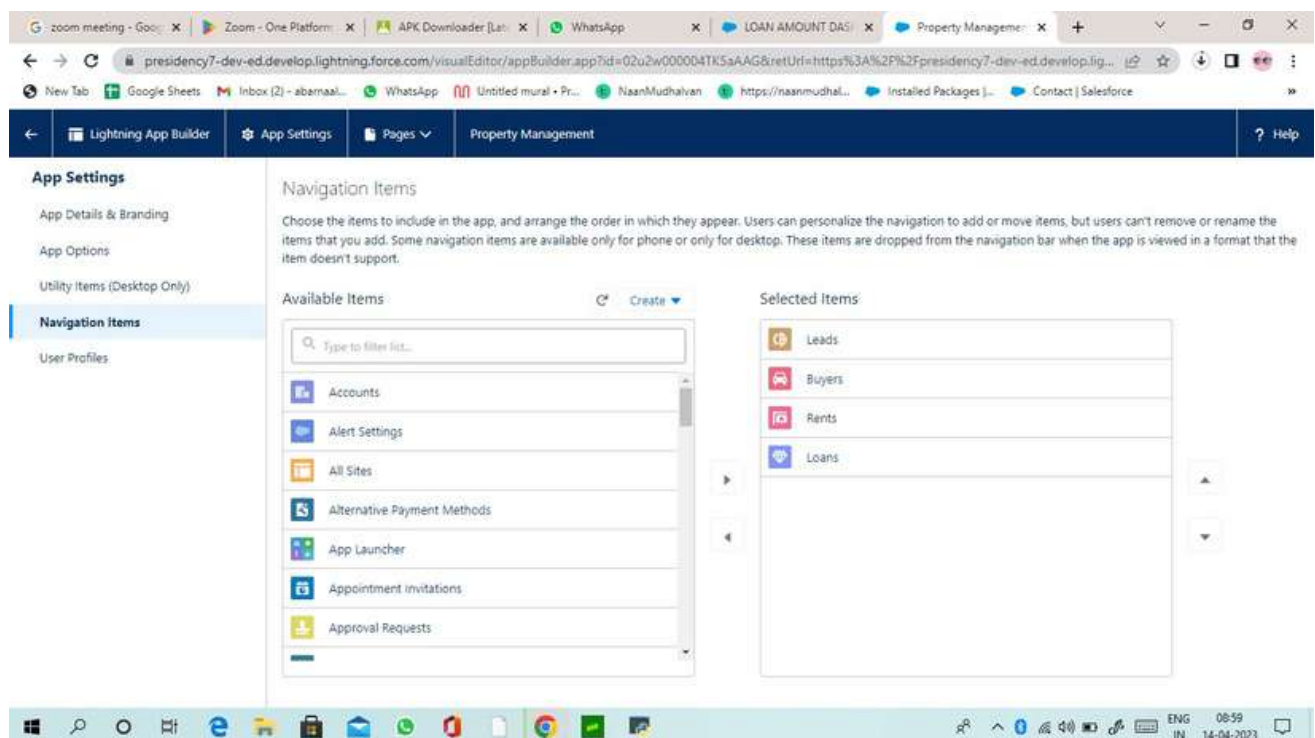
Screenshot of the Salesforce Setup page for the 'Buy' object. The page shows the 'Fields & Relationships' section with 9 items, sorted by Field Label. The table lists fields such as Annual Amount, Balaji, Buy Name, City, Created By, Discount, and Last Modified By, along with their data types and controlling fields.

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	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		

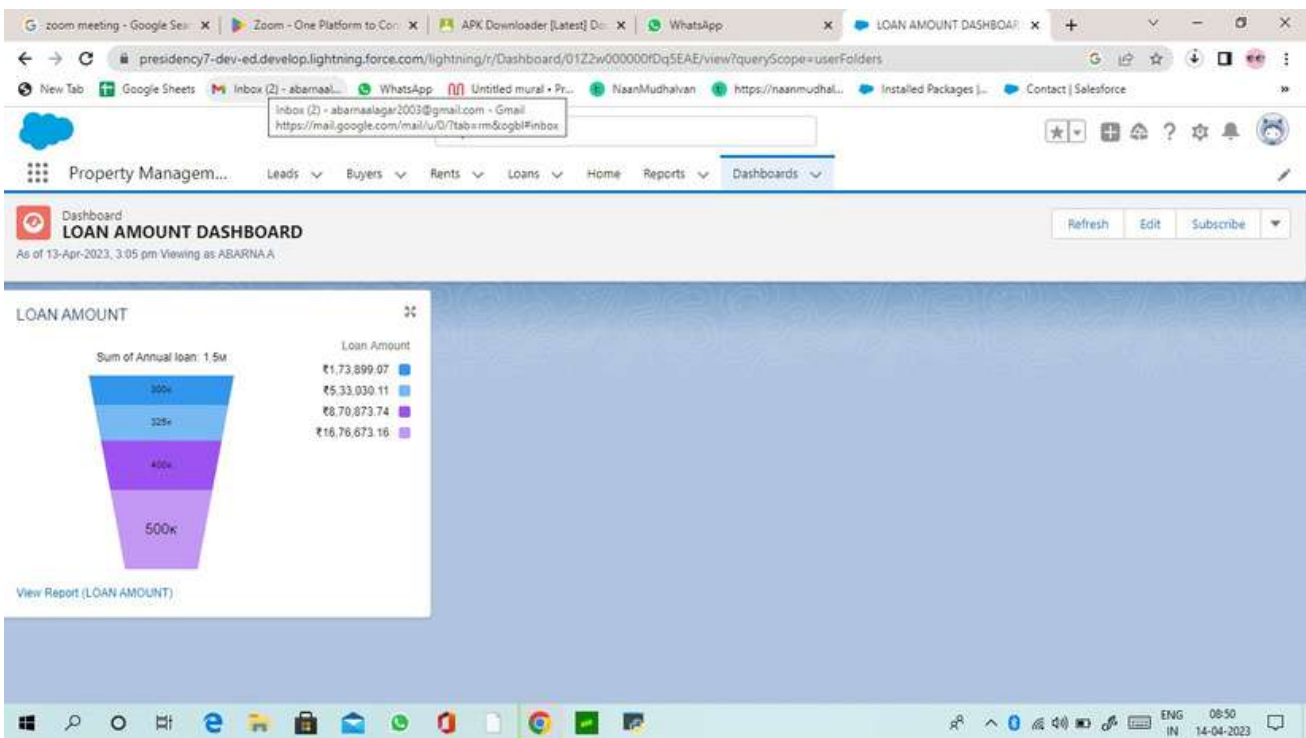
TABS:



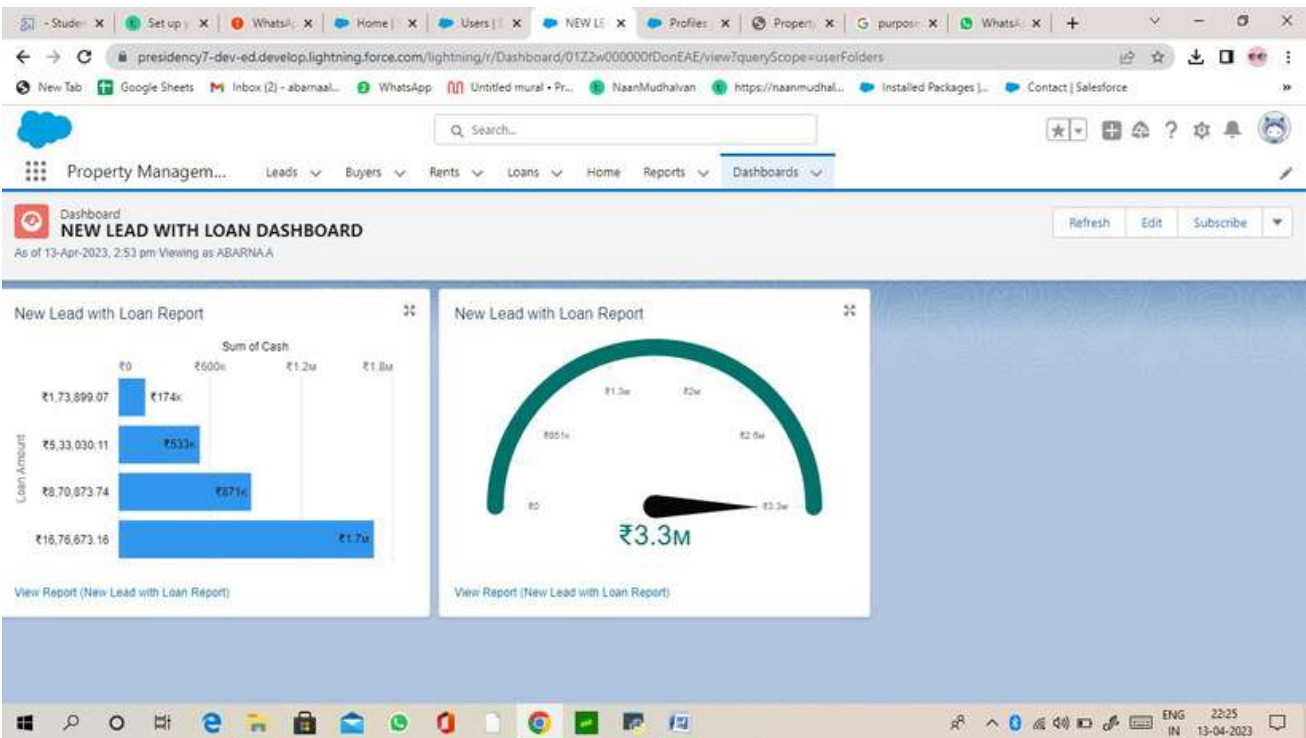
LIGHTNING APP BUILDER:



LOAN AMOUNT DASHBOARD:



NEW LEAD WITH LOAN DASHBOARD:



LEAD FIELD DEPENDENCIES:

The screenshot shows the Salesforce Setup interface for the 'Lead' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, 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 'Lead' and shows the 'Fields & Relationships' section. It displays a table with columns for 'Controlling Field' and 'Dependent Field'. The 'Controlling Field' is 'State' and the 'Dependent Field' is 'City'. Below the table, there are instructions and a legend. The instructions include: 'Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading', 'To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once', 'Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent', and 'Use the Preview button to test the results'. The legend shows 'Excluded Value' in grey and 'Included Value' in yellow. Below the instructions, there are two sections for 'Showing Columns: 1 - 1 (of 1)'. The first section shows 'Maharashtra, Gujarat, Rajasthan' and the second section shows 'Mumbai, Pune, Nashik'. Each section has a 'Click button to include or exclude selected values from the dependent picklist' and buttons for 'Include Values' and 'Exclude Values'.

REPORT:

The screenshot shows the Salesforce Reports interface. The left sidebar contains a navigation menu with options like Reports, Recent, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. The main content area is titled 'Recent' and shows a table of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Loans Report		Private Reports	ABARNA A	13/4/2023, 2:14 pm	
ABARNA - PROPERTY MANAGEMENT		Private Reports	ABARNA A	12/4/2023, 9:03 pm	
LOAN AMOUNT		Private Reports	ABARNA A	13/4/2023, 2:59 pm	
New Lead with Loan Report		Private Reports	ABARNA A	13/4/2023, 2:30 pm	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	17/3/2023, 9:58 am	

4 TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER - <https://trailblazer.me/id/abara310>

TEAM MEMBER 1 - <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.