

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION

1.1 Overview

A property management application built on the Salesforce platform would be a powerful tool to manage all aspects of property management, from listing properties for rent or sale to managing tenant and owner information, maintenance requests, and financial transactions.

1.2 Purpose

The purpose of a property management application built on the Salesforce platform is to provide property managers with a comprehensive tool to manage their properties, tenants, and owners more efficiently and effectively. By using such an application, property managers can streamline their operations, automate tasks, improve communication, and make better-informed decisions.

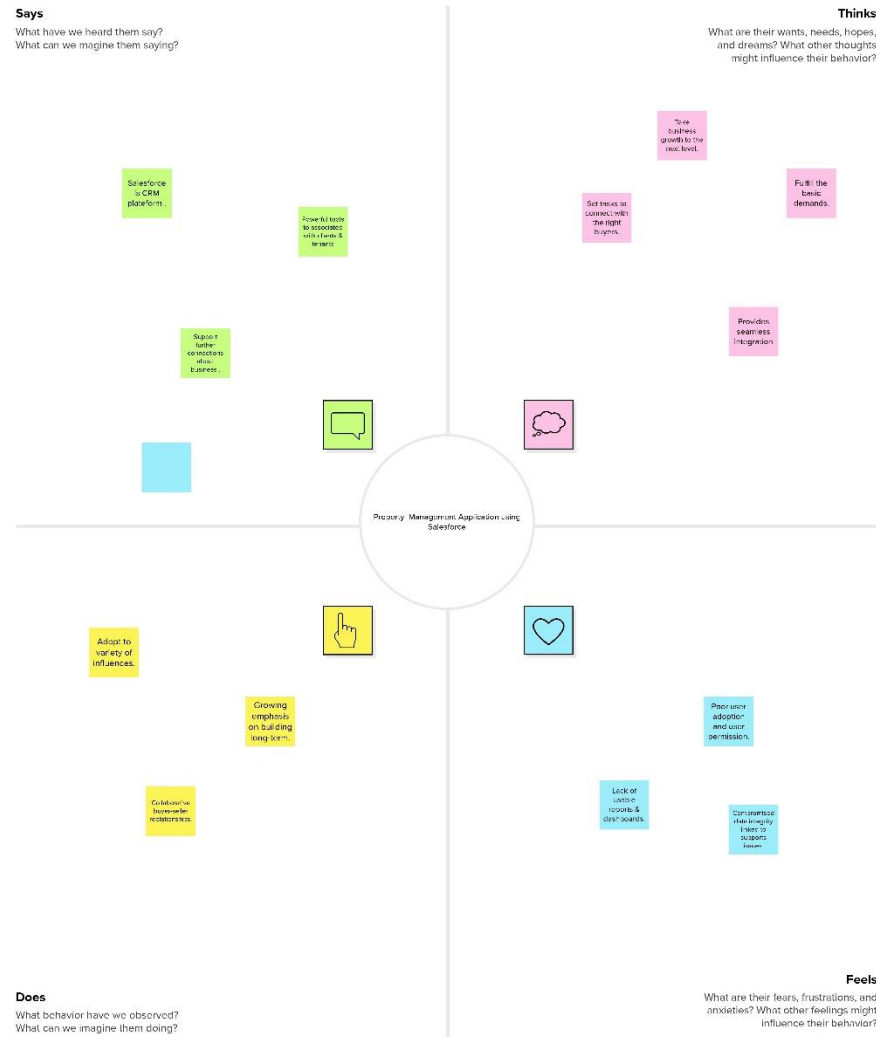
2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map

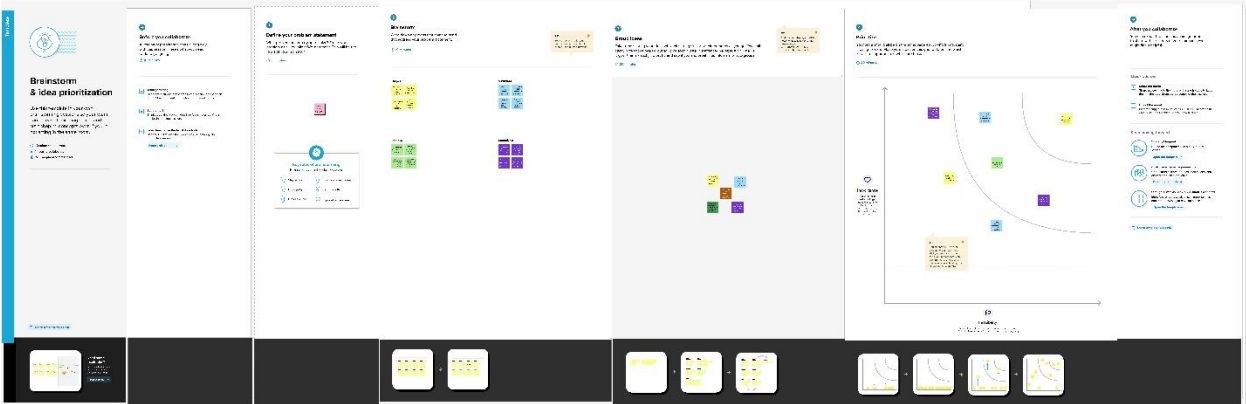


Build empathy

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



2.2 Ideation & Brainstorming Map



3. RESULT

3.1 Data Model:

Object Name	<u>Field in the Object</u>	
Loan	FIELD LABEL	DATA TYPE
	Created By	Lookup (User)
	Last Modified By	Lookup (User)
	Loan Name	Text (80)
	Owner	Lookup (User, Group)

Buy	FIELD LABEL	DATA TYPE
	Buy Name	Text (80)
	Created By	Lookup (User)
	Last Modified By	Lookup (User)
	Owner	Lookup (User, Group)


Rent	FIELD LABEL	DATA TYPE
	Created By	Lookup (User)
	Last Modified By	Lookup (User)
	Owner	Lookup (User, Group)
	Rent Name	Text (80)

Activity And Screenshot:









The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below this, the 'Rent' object is selected under 'SETUP > OBJECT MANAGER'. The left sidebar shows a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and contains the following information:

- Description:** (Empty text field)
- API Name:** Rent__c
- Custom:** (Checked)
- Singular Label:** Rent
- Plural Label:** Rents
- Enable Reports:** (Checked)
- Track Activities:** (Checked)
- Track Field History:** (Checked)
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

At the top right of the details section, there are 'Edit' and 'Delete' buttons.



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Rent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Fields & Relationships

4 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)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent Name	Name	Text(80)		✓



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Buy

Details

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Lightning Record Pages

Buttons, Links, and Actions

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Related Lookup Filters

Details

Edit

Delete

Description

API Name

Buy__c

Custom

✓

Singular Label

Buy

Plural Label

Buyers

Enable Reports

✓

Track Activities


Track Field History

Deployment Status








Deployed

Help Settings

Standard salesforce.com Help Window



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Buy

Details

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Fields & Relationships

4 Items, Sorted by Field Label

Quick Find


New

Deleted Fields








Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Loan

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Details

Edit

Delete

Description

API Name

Loan__c

Custom

✓

Singular Label

Loan

Plural Label

Loans

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Setup

Home

Object Manager

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Fields & Relationships

4 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	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Loan Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Lead

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

Compact Layouts

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Object Limits

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Related Lookup Filters

Lead Custom Field

Number of Locations

Back to Lead Fields

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Number of Locations	Object Name	Lead
Field Name	NumberOfLocations	Data Type	Number
API Name	NumberOfLocations__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Divya P 12/04/2023, 10:37 am	Modified By	Divya P 12/04/2023, 10:37 am

General Options

Setup

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Related Lookup Filters

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By Divya P 12/04/2023, 10:37 am

Modified By Divya P 12/04/2023, 10:37 am

General Options

Required

Unique

External ID

AI Prediction

Default Value

Number Options

Length

3

Decimal Places

0

Validation Rules

New

Validation Rules Help

No validation rules defined.

Setup

Home

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Lead Custom Field

SIC Code

Back to Lead Fields

Validation Rules

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label

SIC Code

Object Name

Lead

Field Name

SICCode

Data Type

Text

API Name

SICCode__c

Description

Help Text

Data Owner

Field Usage


Data Sensitivity Level

Compliance Categorization








Created By Divya P 12/04/2023, 10:37 am

Modified By Divya P 12/04/2023, 10:37 am

General Options



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Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By [Divya P](#) 12/04/2023, 10:37 am

Modified By [Divya P](#) 12/04/2023, 10:37 am

General Options

Required ☐

Unique ☐

Case Sensitive ☐

External ID ☐

Default Value

Text Options


Length 15

Validation Rules








New

Validation Rules Help ?

No validation rules defined.



Search Setup



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Lead Custom Field

Product Interest

[Back to Lead Fields](#)

Validation Rules 00

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label Product Interest

Field Name ProductInterest

API Name ProductInterest__c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization


Created By [Divya P](#) 12/04/2023, 10:37 am

Modified By [Divya P](#) 12/04/2023, 10:37 am








Object Name [Lead](#)

Data Type Picklist

General Options



Search Setup



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API Name

Description

Help Text

Data Owner

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Created By

Modified By

General Options

Picklist Options

Picklist Values Used

ProductInterest__c

Divya P. 12/04/2023, 10:37 am

Divya P. 12/04/2023, 10:37 am

Required

Default Value

Restrict picklist to the values defined in the value set

Controlling Field

Active picklist values


Inactive picklist values

i








[New]

3 (1,000 max)

0



Search Setup



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API Name

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

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Created By

Modified By

General Options

Picklist Options

Picklist Values Used

ProductInterest__c

Divya P. 12/04/2023, 10:37 am

Divya P. 12/04/2023, 10:37 am

Required

Default Value

Restrict picklist to the values defined in the value set

Controlling Field

Active picklist values

Inactive picklist values

i

[New]

3 (1,000 max)

0

Setup

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Lightning Experience Transition Assistant

Salesforce Mobile App

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SETUP

Permission Sets

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Named Credential Access
Permissions to authenticate against named credentials

Custom Permissions
Permissions to access custom processes and apps

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom settings

System

Settings that apply across all apps, such as record and user management
[Learn More](#)

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

Service Providers
Permissions that let users switch to other websites using single sign-on.

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Lead Custom Field

Primary

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[Help for this Page](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Primary	Object Name	Lead
Field Name	Primary	Data Type	Picklist
API Name	Primary__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Divya P. 12/04/2023, 10:37 am	Modified By	Divya P. 12/04/2023, 10:37 am

General Options

Required

☐

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Required

Default Value

Picklist Options

Restrict picklist to the values defined in the value set

Controlling Field

Picklist Values Used

Active picklist values

Inactive picklist values

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

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SETUP

User

Divya P

Permission Set Assignments

Permission Set Assignments: Activation Required

Permission Set Group Assignments

Permission Set License Assignments

Personal Groups

Public Group Membership

Queue Membership

Team

Managers in the Role Hierarchy

OAuth Connected Apps

Third-Party Account Links

Installed Mobile Apps

Authentication Settings for External Systems

Login History

User Provisioning Accounts

User Detail

Edit

Sharing

Change Password

Name	Divya P	Role	
Alias	DP	User License	Salesforce
Email	divyasneha3103@gmail.com	Profile	System Administrator
Username	divyasneha3103@gmail.com	Active	✓
Nickname	User16812760293128421345	Marketing User	✓
Title		Offline User	✓
Company	SmartInnrmz	Knowledge User	
Department		Flow User	
Division		Service Cloud User	✓
Address	IN	Site.com Contributor User	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	
Locale	English (India)	WDC User	

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Users

Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password Authenticator	(Connect) i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i
App Registration: Salesforce Authenticator	(Connect) i	Send Apex Warning Emails	<input type="checkbox"/>
Security Key (U2F or WebAuthn)	i	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Lightning Login	(Enroll) i	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	(Generate) i	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
		Make Setup My Default Landing Page	<input checked="" type="checkbox"/>
		Quick Access Menu	<input checked="" type="checkbox"/>
		Development Mode	<input type="checkbox"/>
		Show View State in Development Mode	<input type="checkbox"/>

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Allow Forecasting

Call Center

Phone

Extension

Fax

Mobile

Email Encoding

Employee Number

Start of day

End of day

Used Data Space

Used File Space

Last Login

Last Password Change or Reset

Failed Login Attempts

Individual

Created By

Modified By

☐

☐

☐

☒

[Add](#)

Unicode (UTF-8)

6:00 am

11:00 pm

274 KB [View](#)

0 B [View](#)

18/04/2023, 12:30 pm

12/04/2023, 10:45 am

0 [1](#)

Divya P. 12/04/2023, 10:37 am

Divya P. 12/04/2023, 10:45 am

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[Where is this used?](#)

Field Information

Field Label

Field Name

API Name

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By

Current Generator(s)

CurrentGenerators

CurrentGenerators__c

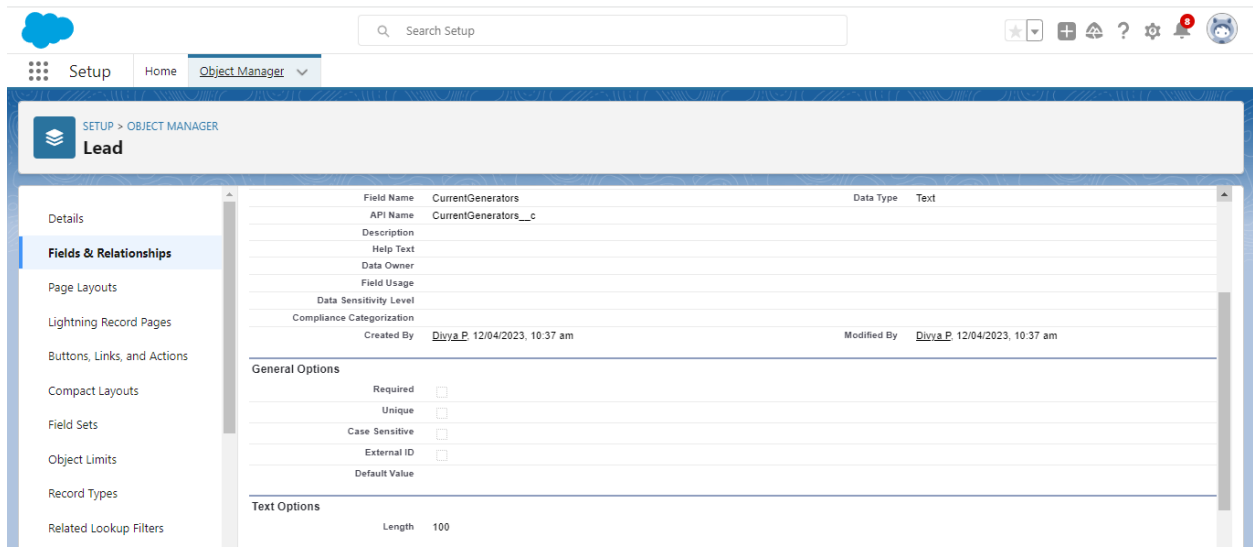
Divya P. 12/04/2023, 10:37 am

Object Name

Data Type

Divya P. 12/04/2023, 10:37 am

General Options



4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/divyasneha3103>

Team Member 1 - <https://trailblazer.me/id/vinithamurugan0901>

Team Member 2 - <https://trailblazer.me/id/sands81>

Team Member 3 - <https://trailblazer.me/id/rohini2401>

5. Advantages & Disadvantages

➤ **Advantages:**

- ❖ **Centralized Data:** All data related to properties, tenants, owners, and finances can be managed in one place, making it easy to access and update information quickly.
- ❖ **Increased Efficiency:** By automating routine tasks, such as rent collection and maintenance requests, property managers can save time and focus on more strategic activities, such as property acquisition and tenant retention.
- ❖ **Improved Communication:** The application provides a platform for property managers, tenants, and owners to communicate efficiently and effectively, which can improve customer satisfaction and reduce misunderstandings.
- ❖ **Data-Driven Decision Making:** The application provides analytics and reporting features, which can help property managers make data-driven decisions and optimize their operations.
- ❖ **Scalability:** As a cloud-based platform, Salesforce can easily scale to meet the needs of growing property management companies.

➤ **Disadvantages:**

- ❖ **Cost:** Salesforce is a premium software platform, and the cost of using it can be prohibitive for smaller property management companies.
- ❖ **Training:** Because Salesforce is a complex platform, it may take time and resources to train property management staff to use it effectively.
- ❖ **Customization:** While Salesforce is highly customizable, it may require a significant investment of time and resources to configure it to meet the specific needs of a property management company.
- ❖ **Security Concerns:** Because sensitive information about tenants and owners is stored in the application, there may be concerns about the security of the data and the potential for data breaches.

- ✓ Overall, the advantages of a property management application using Salesforce outweigh the disadvantages for many property management companies, particularly those that are growing and need a scalable platform to manage their operations efficiently. However, its important carefully

consider the costs and resources required before making the decision to implement a Salesforce-based property management application.

6. Applications:-

- ❖ **Property Listings:** The application would allow property managers to create and manage property listings, including photos, descriptions, and pricing information.
- ❖ **Tenant and Owner Management:** The application would enable property managers to manage tenant and owner information, including contact details, lease agreements, rental payments, and maintenance requests, in one place.
- ❖ **Maintenance and Work Order Management:** The application would provide a platform for tenants to submit maintenance requests, and for property managers to track those requests, assign tasks to maintenance staff, and monitor the progress of work orders.
- ❖ **Financial Management:** The application would provide tools for property managers to track rent payments, expenses, and other financial transactions, generate invoices, and generate financial reports.
- ❖ **Communication:** The application would facilitate communication between property managers, tenants, and owners, via email, text message, or other channels, and provide a platform to manage all communication in one place.
- ❖ **Analytics and Reporting:** The application would provide analytics and reporting features to help property managers understand key performance indicators, such as occupancy rates, rent collection, and maintenance costs, and make data-driven decisions.

7. Conclusion

In conclusion, a property management application using Salesforce can provide significant benefits to property managers, including centralized data management, increased efficiency, improved communication, data-driven decision-making, and scalability. While there may be some disadvantages to using Salesforce, such as cost, training, customization, and security concerns, the advantages often outweigh these potential drawbacks. Specific use cases for a property management application using Salesforce might include listing properties for rent or sale, managing tenant and owner information, processing rent payments, handling maintenance requests, and analyzing performance metrics. Overall, a property management application using Salesforce is a powerful tool for managing properties and can help property managers run their businesses more efficiently and effectively.

8. Future Scope:

The future scope for a property management application using Salesforce is promising, as there are several trends and innovations that are likely to shape the industry in the coming years:

- ❖ **Artificial Intelligence and Machine Learning:** With the help of AI and machine learning, property management applications can become more sophisticated and intelligent, enabling them to analyze data, predict trends, and automate routine tasks.
- ❖ **Internet of Things (IoT):** The integration of IoT devices, such as smart thermostats, door locks, and security systems, can help property managers monitor and control properties remotely, improving efficiency and reducing costs.
- ❖ **Virtual and Augmented Reality:** The use of virtual and augmented reality can help property managers showcase properties to potential tenants and owners, providing a more immersive and engaging experience.
- ❖ **Blockchain:** Blockchain technology can provide secure and transparent transactions, improving the efficiency of financial management and reducing the risk of fraud.

- ❖ Sustainability: With the increasing focus on sustainability, property management applications can help property managers track energy usage, reduce waste, and improve environmental performance.
- ✓ As these technologies and trends continue to evolve, property management applications using Salesforce can adapt and incorporate them into their functionality, providing property managers with even more powerful tools to manage their properties, tenants, and owners. Additionally, the scalability of the Salesforce platform means that these applications can easily grow and evolve alongside property management companies, ensuring that they remain relevant and effective for years to come.