PROPERTY MANAGEMENT USING SALESFORCE

1.1.INTRODUCTION:

THE PROJECT NAME IS

PROPERTY MANAGEMENT USING SALESFORCE

Property management is the operation, control, maintenance, and oversight of real estate and physical property.

This can include residential, commercial, and land real estate. Management indicates the need for real estate to be cared for and monitored, with accountability for and attention to its useful life and condition. This is much akin to the role of management in any business.

Property management involves the processes, systems, and workforce required to manage the life cycle of all acquired property as defined above, including acquisition, control, accountability, responsibility, maintenance, utilization, and disposition.

1.2.purpose

Property management is the daily oversight of residential, commercial, or industrial real estate by a third-party contractor. Generally, property managers take responsibility for day-to-day repairs and ongoing maintenance, security, and upkeep of properties.

Property managers **assist owners in creating budgets, advertise rental properties, qualify tenants, and collect rent**. They also comply with the local landlord and real estate board laws and maintain the property.
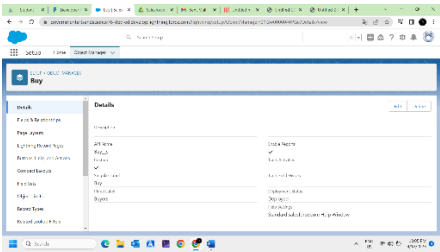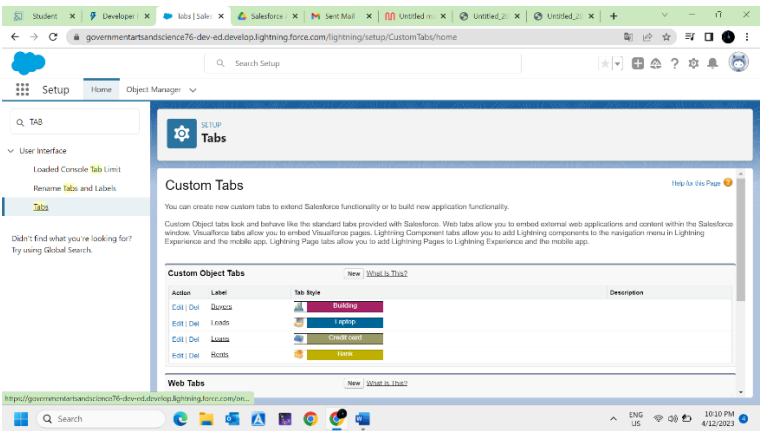
2.PROBLEM DEFENITION AND DESIGN THINKING :

2.1 EMPATHY MAP

2.2. IDEATION& BRAINSTROMING MAP
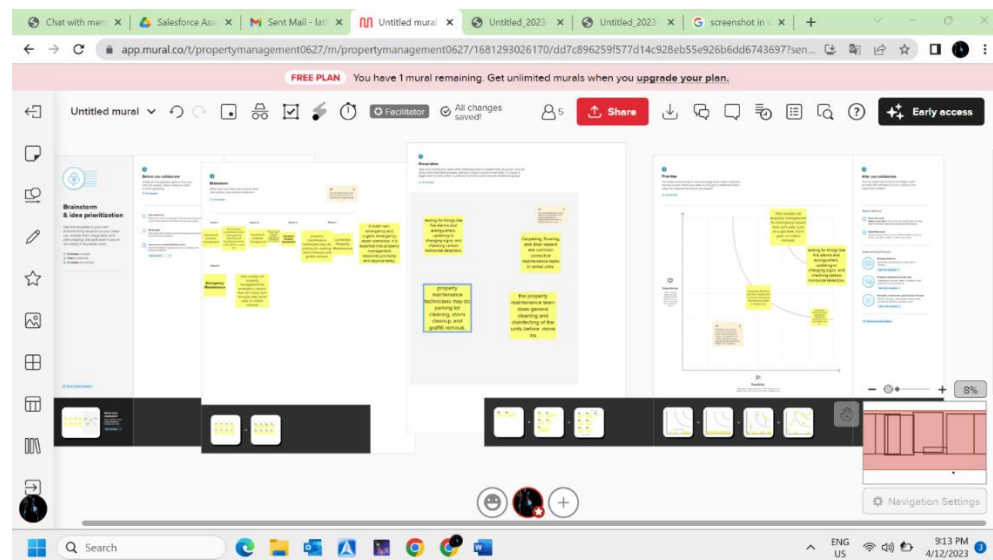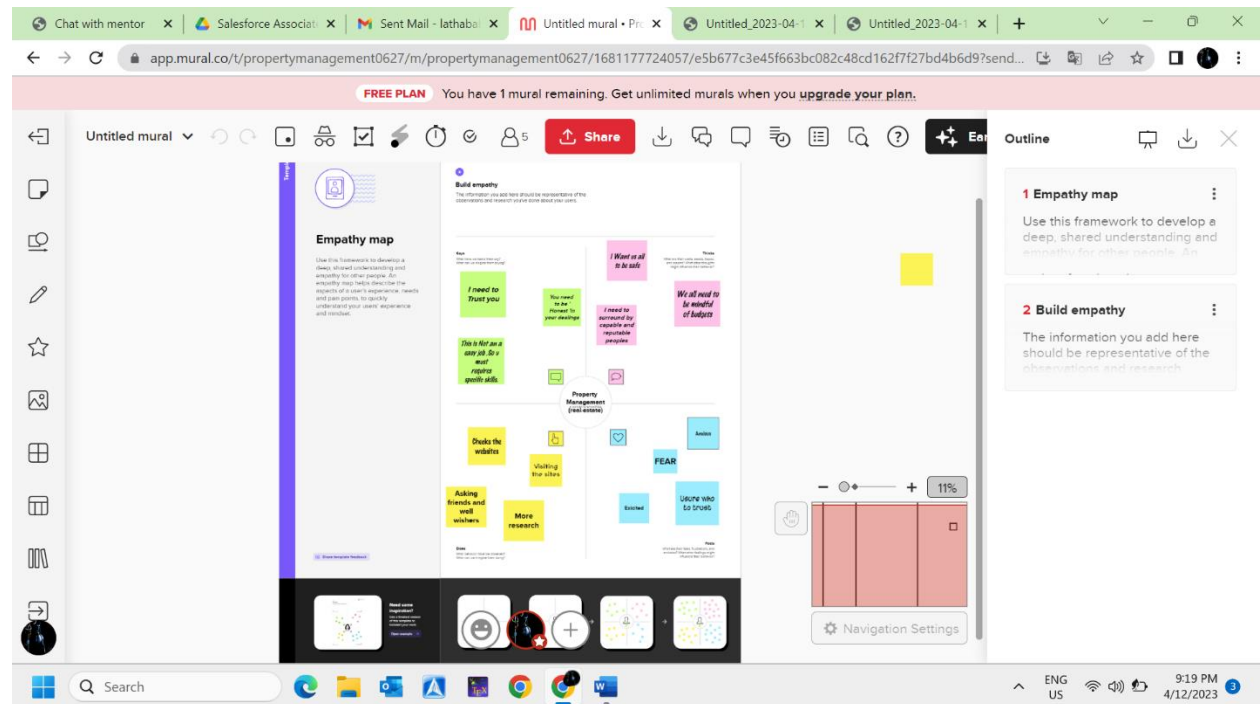
3.RESULT:

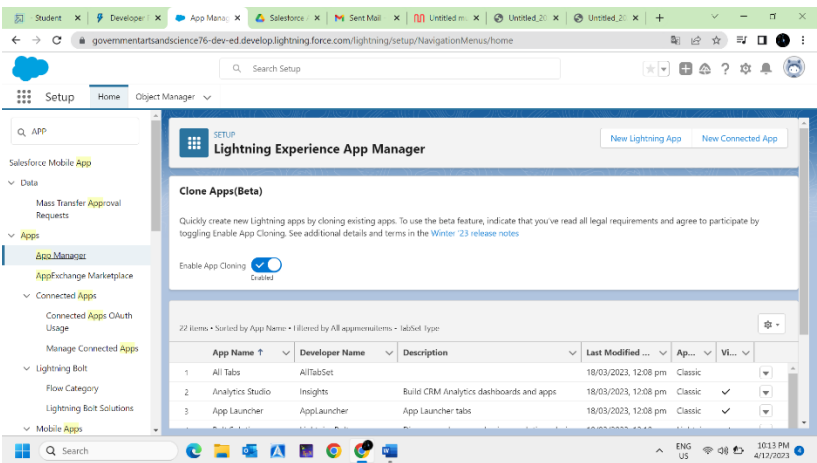| OBJECT NAME	FIELDS IN THE OBJECT	
LEAD	FIELD LABEL	DATA TYPE
	Lead	Auto number
	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
BUY	FIELD LABEL	DATATYPE
	Property type	Picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
	Annual amount to be paid	
RENT	FIELD LABEL	DATATYPE
	Rent	Auto tab
	Rental city	Text
	BHK type	Picklist
LOAN	FIELD LABEL	DATA TYPE
	Loan Id	Auto number
	Interest Rate	Currency
	Term annual Loan amount	Field
	Loan Instalments	Number
	Loan	Number
	Repayment	Number

	Loan Amount	Formula

3.2 .ACTIVITY AND SCREENSHORT:

1.CREATED OBJECTS (BUY,RENT,LOAN)

2.CREATED TABS FOR THE OBJECT FROM THE NEW TABS

3.CREATED THE LIGHTNING APP USING THE APP MANAGER AS THE PROPERTY MANAGEMENT.

4.CREATED THE FEIDS FOR THE OBJECTS(RENT,BUY,LOAN).

5.created profiles for Sales Manager then Standard user Profile , Marketing Executive1 and Executive2 then Standard

Platform User, Marketing Manager then Standard Platform User
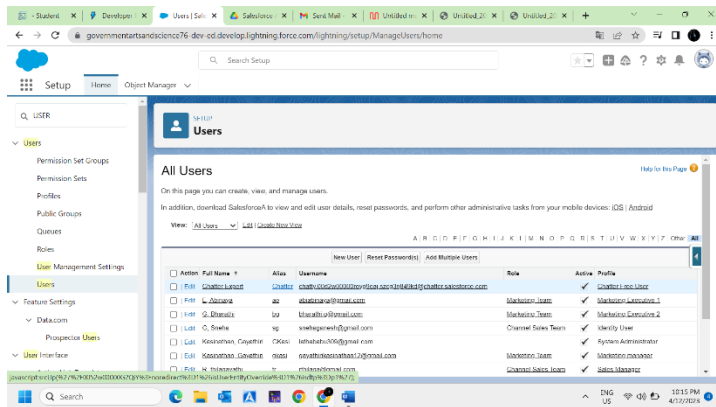
6.created the new users.
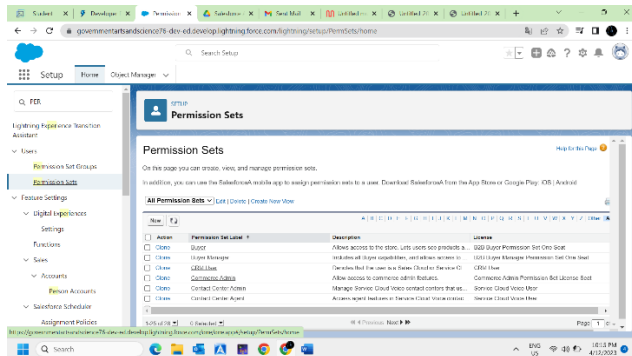
7.CREATED THE PERMISSION SETS.

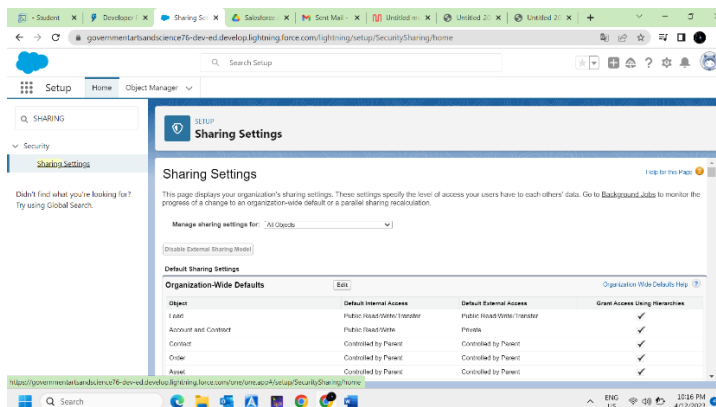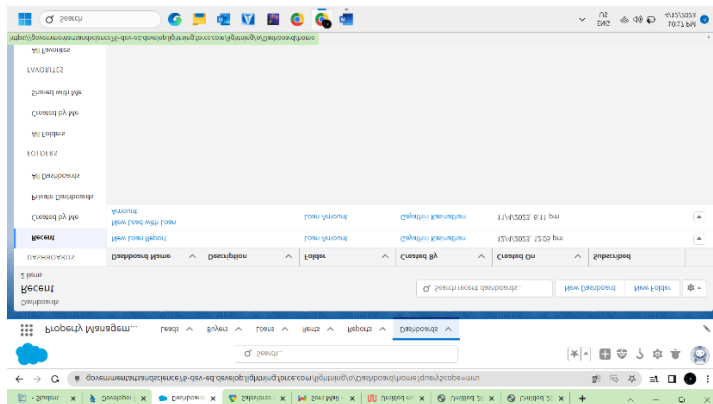
8.CREATED THE OWD SETTINGS.
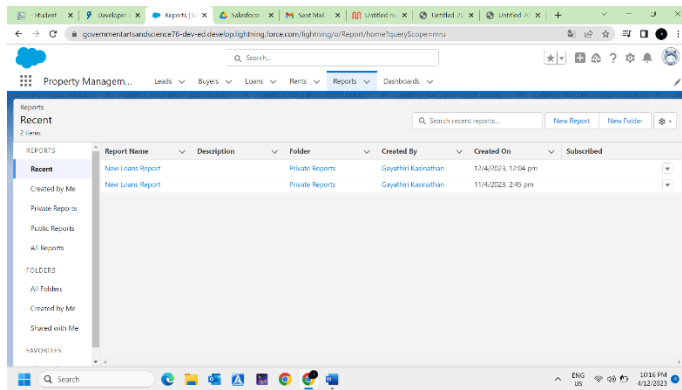
9.CRATED THE REPORT SECTION.

10. CREATED THE DASHBOARD FROM THE REPORTS.

4.TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD: https://trailblazer.me/id/gkasinathan

TEAM MEM 1: https://trailblazer.me/id/thilr3

TEAM MEM 2: https://trailblazer.me/id/bharg605

TEAM MEM 3: https://trailblazer.me/id/ababi107

TEAM MEM 4: https://trailblazer.me/id/sgovindasamy9

5.ADVANTAGES & DISADVANTAGES:

ADVANTAGES:

- real-time reports and dashboards.
- Streamline lead, opportunity, and contact management.
- Simplify document management and data sharing.
- Enhance communication and collaboration tools
- Have reminders and notifications of important events, emails, and calls
- Synchronize calendar, task management system, and email services with the CRM
- Integrate digital advertising with the client-management system
- Centralize management of all tenure contracts, units, and other data
- Stay in touch with clients, monitor all client communications, and rent administrator's activities and their statuses
- Synchronize Activity administration and email tracking
- Integrate a website with a customer portal to allow for requests, client profiles, account statements, etc.
- Automate conditional and client's approvals and workflow.

  DISADVANTAGES:

  - EXPENSIVE
  - INVOLVE:
    Property managers likely won't involve you for minor tenant issues, maintenance issues, or other trivial matters. This is because they are equipped to handle these issues and have learned the best way to do so.

6. APPLICATIONS:

1. RESIDENTAL PROPERTY MANAGEMENT:

- Single family homes
- Vacation rentals
- Multifamily homes
- Town houses
- apartments

2. COMMERCIAL PROPERTY MANAGEMENT:
   - Hotels
   - MALLS
   - RESTAURENTS
   - GAS STATIONS
   - OFFICE PROPERTIES

3. INDUSTRIAL PROPERTY MANAGEMENT:
   - AUTOMOTIVE PLANTS
   - STEEL MILLS
   - FOOD PACKAGING
   - DISTRIBUTION FACILITIES

4. SPECIAL PURPOSE PROPERTY MANAGEMENT:
   - SCHOOLS &UNIVERSITIES
   - RESORTS
   - SPORT ERANAS
   - THEATERS

7.CONCLUSION:

In this property management we can make the understanding reports for Buyers, Loans,Rents.

In this ,creating the objects and then adding the particular fields for the objects .

We can make the list of users and creating the profiles and give the permission sets ,making reports and creating the dashboards.

We can create and maintain a proper detailed records.

8. FUTURE SCOPE:

1. The Cost of the housing will keep Rising.
2. Use of clouds.
3. Security.
4. Rental apps.
5. Smart home apps and devices.