

# **Property Management Application using Salesforce**

## **Project Description:**

Develop an App for the Property Management where Buyer can order his Requirements and get the Appropriate Details of the Property. According to his interest just provide him with some discounts upwhat extent he can get the discount. Also Track Whether he is Interested in taking the loan available for so just calculate how much loan Amount user can get it. Provide the Security for two different profiles like for marketing and sales team. Then Finally Create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal.

What you'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce

## **1.Introduction:**

Real estate management software :

Real estate management is not a new concept. Property managers have been managing relevant data for as long as the rental market has existed. However, as new technologies become more widely available, the capabilities of real estate management are advancing. Today's real estate management software is used to connect property managers and tenants like never before. That's because modern real estate management tools incorporate the same technology used in customer relationship management (CRM). With CRM for real estate management, property managers can now offer their tenants the kind of high-level customer service that is so important to developing long-term business relationships.

## 1.1 Overview :

Based on the GrandViewResearch study, the global property management software market size is expected to reach \$14 million by 2028. It means that more and more companies are going to invest in residential and commercial real estate technology and CRM consulting. Learn what companies look for in the property management CRM, why they choose Salesforce for property management, and what top solutions are powered by this platform.

## 1.2.Purpose :

Salesforce Property Management has powerful tools to remain associated with clients and tenants continuously, support further connections, track key data about business and residential properties, including occupancy rates, essential tenants, and revenue and take your productivity, and business growth, to the next...

Best Property Management CRM on Top of Salesforce.

Breal Real Asset Management CRM.

AgentHub Property Administration CRM.

Rethink Real Estate Administration CRM.

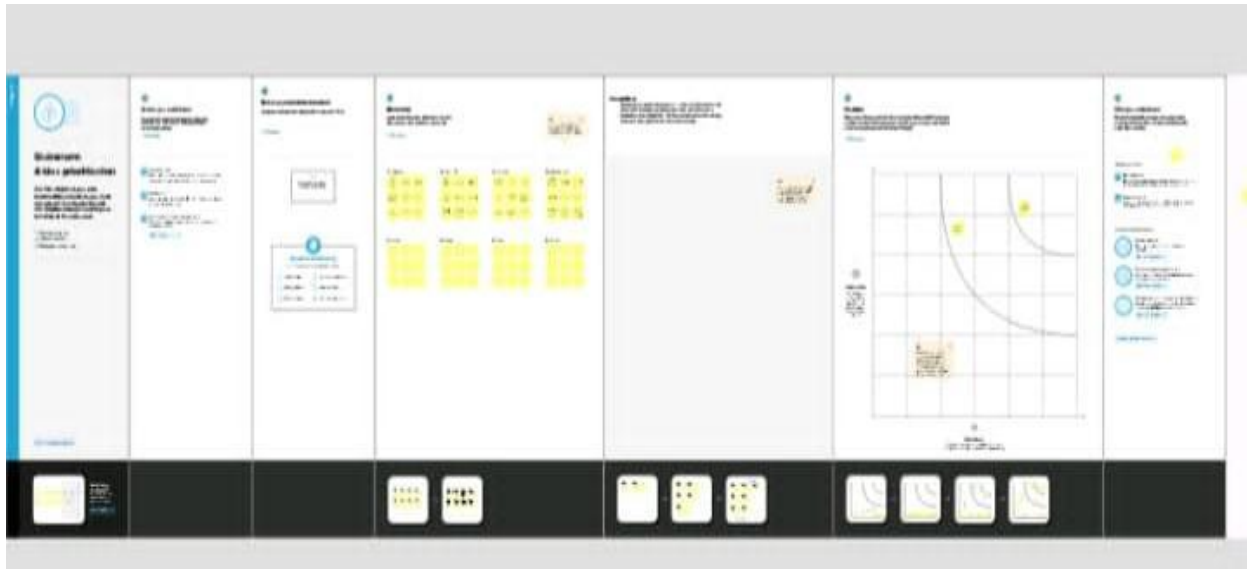
Property base CRM Property Rent Management CRM.

A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties. PMS is also used in manufacturing industries, local government and manufacturing.

PMS provides a centralized computer system to organize, schedule and perform the day-to-day functions and transactions involved in accommodations businesses. Computer record keeping and PMS have increased the efficiency of hospitality industries significantly simply by making it possible to update and consult centralized records from multiple computers and devices. PMS solutions have been customized for the needs of the hospitality industry to further increase ease of operations. Functions managed by a PMS include automation of many common tasks, including:

- Bookings
- Check-in and check-out





### 3. RESULT

Object name	Field in the object	
	Field label	Data type
1.	Buy	Autonumber
2.	Rent	Auto number
3.	Loan	Auto number
4.	Lead	Auto number

### 3.2 ACTIVITY AND SCREENSHOT

This screenshot shows the Salesforce Setup interface for the 'Lead' object. The browser address bar indicates the URL: `dmrgovernmentartsandsc-b3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Lead/Details/view`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The left sidebar lists various configuration options under the 'Details' section, including 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 displays the 'Details' for the 'Lead' object, showing fields like Description, API Name (Lead), Custom, Singular Label (Lead), Plural Label (Leads), and various settings such as Enable Reports, Track Activities, Track Field History, Deployment Status, and Help Settings.

This screenshot shows the Salesforce Setup interface for the 'Rent' object. The browser address bar indicates the URL: `dmrgovernmentartsandsc-b3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004031h/view`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The left sidebar lists various configuration options under the 'Details' section, including 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 displays the 'Details' for the 'Rent' object, showing fields like Description, API Name (RentName\_\_c), Custom, Singular Label (Rent), Plural Label (Rents), and various settings such as Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings. There are 'Edit' and 'Delete' buttons in the top right corner of the main content area.

Loan | Salesforce

drmgrgovernmentartsandsc-b3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004034R/Details/view

Search Setup

Setup Home 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

**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

Home | Salesforce

drmgrgovernmentartsandsc-b3-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3DCus...

Search Setup

Setup Home Object Manager

Q Tabs

User Interface

Rename **Tabs** and Labels

**Tabs**

Didn't find what you're looking for?  
Try using Global Search.

### Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

**Custom Object Tabs** [New](#) [What Is This?](#)

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Buys</a>	Building	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Buys</a>	Books	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Loans</a>	Building Block	

**Web Tabs** [New](#) [What Is This?](#)

No Web Tabs have been defined

**Visualforce Tabs** [New](#) [What Is This?](#)



Dashboard: **Lead with loan amount**  
As of 31-Mar-2023, 9:19 pm Viewing as Kaeemana I

First Name	Last Name	Title	Company / Account	Email
Andy	Young	SVP, Operations	Dickenson plc	a_young@dickenson.com
Bertha	Boyer	Director of Vendor Relations	Farmers Coop. of Florida	bertha@fcof.net
Betty	Bair	VP, Administration	American Banking Corp.	bbair@abankingco.com
Bill	Dadio	CFO	Zenith Industrial Partners	bill_dadio@zenith.com
Brenda	McCl	CFO	Cardinal Inc.	brenda@cardinal.net

View Report (lead with loan amount)

#### 4. TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER – <https://trailblazer.me/id/iyyam4>

Team member 1 – <https://trailblazer.me/id/kdhanasekar7>

Team member 2 – <https://trailblazer.me/id/mutmk>

Team member 3 – <https://trailblazer.me/id/kibai3>

#### 5. ADVANTAGE

- Easy maintenance monitoring.
- Easy payments from tenants and contractors.
- Data tracking.
- Property management.
- 24\*7 support & customer loyalty.
- Quick inspection.
- Tenant screening.



## DISADVANTAGE

- Lack of specialists that have a deep understanding of property management business and its priorities.
- Higher price if you look not only for technical skills but for industry expertise, especially in specific niches like property management.
- PMS provides a suite of services that can help firms monitor and optimize back-office activities and finances and even enhance the security of their properties. Additionally, PMS enhances communication between tenants, owners, and managers, making it easier for all parties to stay informed and connected in real time-consuming if you choose the wrong system.
- Might seem expensive for a small business.
- Training (cost and time).

## 6. APPLICATION

A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties. PMS is also used in manufacturing industries, local government and manufacturing.

- Lease collection.
- Lease adjustments.
- Property expense controls
- Property Project administration
- Generation of work orders
- Management and generation of common expenses (HOA expenses)
- Ticket requirement management of branches.

## 7.CONCLUSION

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. PMS provides a suite of services that can help firms monitor and optimize back-office activities and finances and even enhance the security of their properties. Additionally, PMS enhances communication between tenants, owners, and managers, making it easier for all parties to stay informed and connected in real time.

The number one benefit of using a PMS is saving time. One of the biggest problems hoteliers face is being time-poor. With a PMS, you'll reduce time spent on admin, increase time available for backlogged tasks, and most importantly, free up time for yourself.

Property manager responsibilities include setting and collecting rent, handling maintenance requests, filling vacant units and potentially setting the budget for the property. Property managers often take care of property that real estate investors either do not live near or do not wish to personally manage.

## **8. FUTURE SCOPE**

Advanced automation takes real estate management into the future. With access to the right data, property managers can improve their business and better connect with their tenants. But checking reports and applying insights still takes time, and when you have a large number of clients, that's time you might not have — unless your real estate management software solution incorporates advanced AI. Artificial intelligence (AI) picks up where more traditional automation leaves off. For example, A.I. can incorporate data to build tenant emails, suggest next steps, and find connections. And, with new advances in machine learning, property management AI can actually become smarter and more effective as it goes. If you want to provide your tenants with the best possible service, having AI enhanced real estate management software can make a significant difference, while also freeing you up to focus on what's truly important: the relationship not just the details.

Salesforce revolution real estate management. The rental industry is on the rise, and property management is growing to meet it. Salesforce, already the world leader in CRM technology, has long been used as a superior real estate management system, making CRM for real estate a reality. And now, thanks to specialised applications built on the Salesforce Platform and incorporating the most advanced AI available, you can use those tools to manage your data, guide your tenants, and optimize your property management business.

Your renters need more than just shelter — they need a property manager they know they can trust. With real estate management software from Salesforce, you can give your renters the support they need. Contact Salesforce today and start building relationship.