PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1 INTRODUCTION

1.1 Overview :

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 up to what 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.

Property management is the supervision of residential, commercial, and industrial properties, including apartments, detached houses, condominium units, and shopping centres. It typically involves administering property owned by another party or entity. Their duties include finding tenants for the rental properties, preparing and signing lease agreements and collecting rent deposits and fees. They also conduct regular maintenance work and ensure garbage disposal and property cleaning.

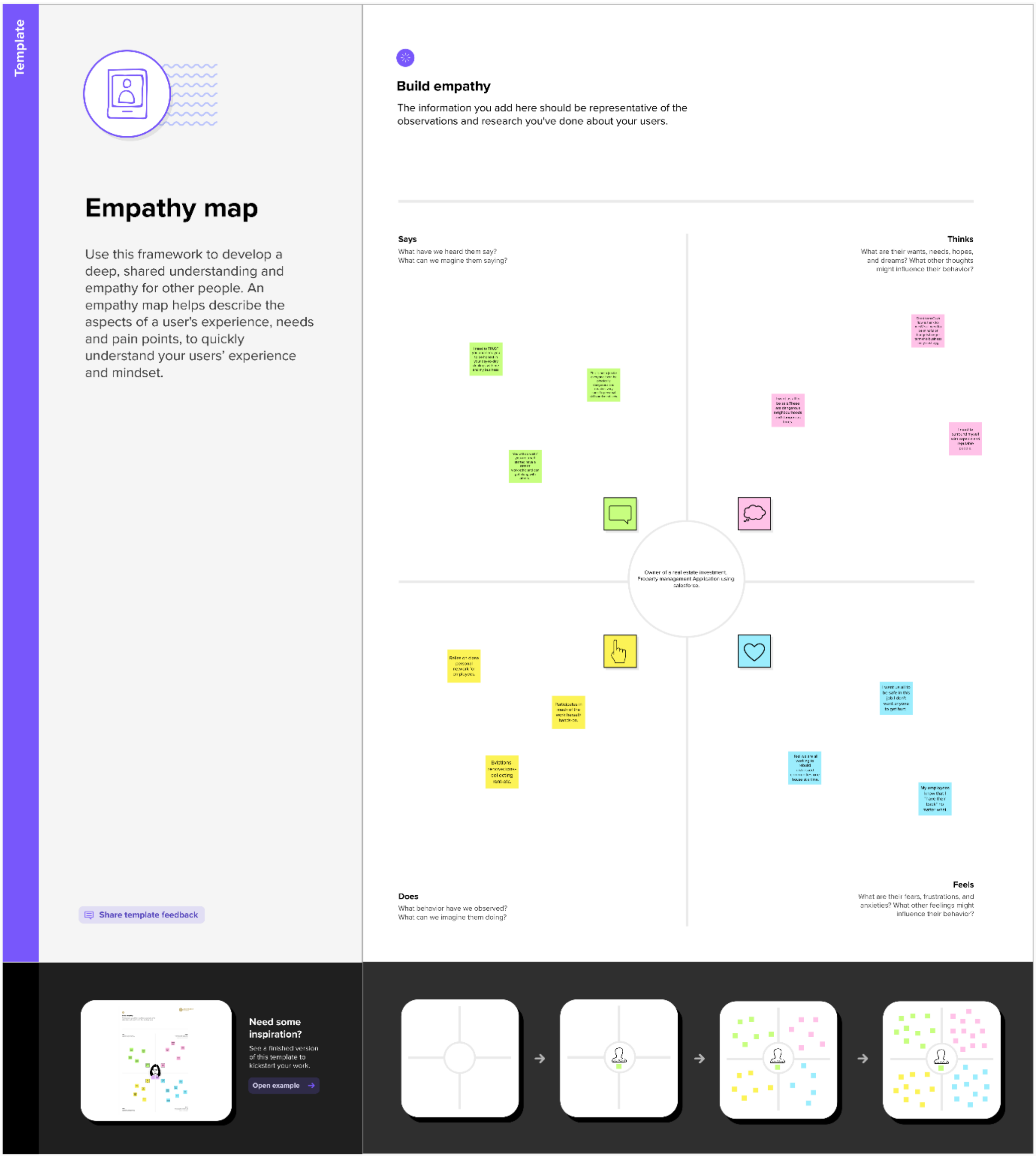
1.2 PURPOSE:

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.

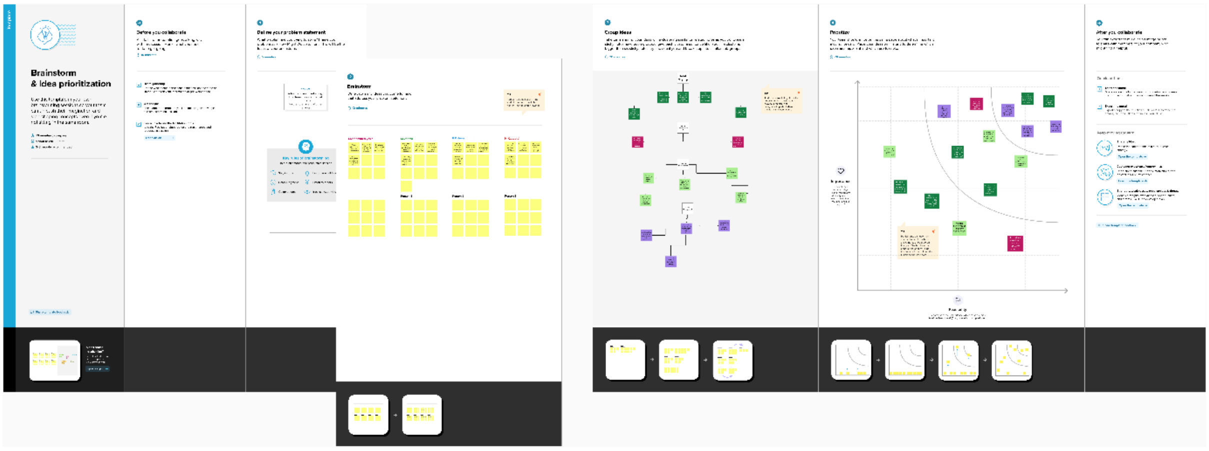
The property manager will maintain the listings for properties, organise the inspections for potential tenants, prepare the tenancy agreements, and manage and collect any rental income. Other property management functions include liaising with tradespeople to schedule the upkeep or repair of the property as needed. 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.

2 PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP:



2.2 Ideation and brainstorming map:



3 RESULT:

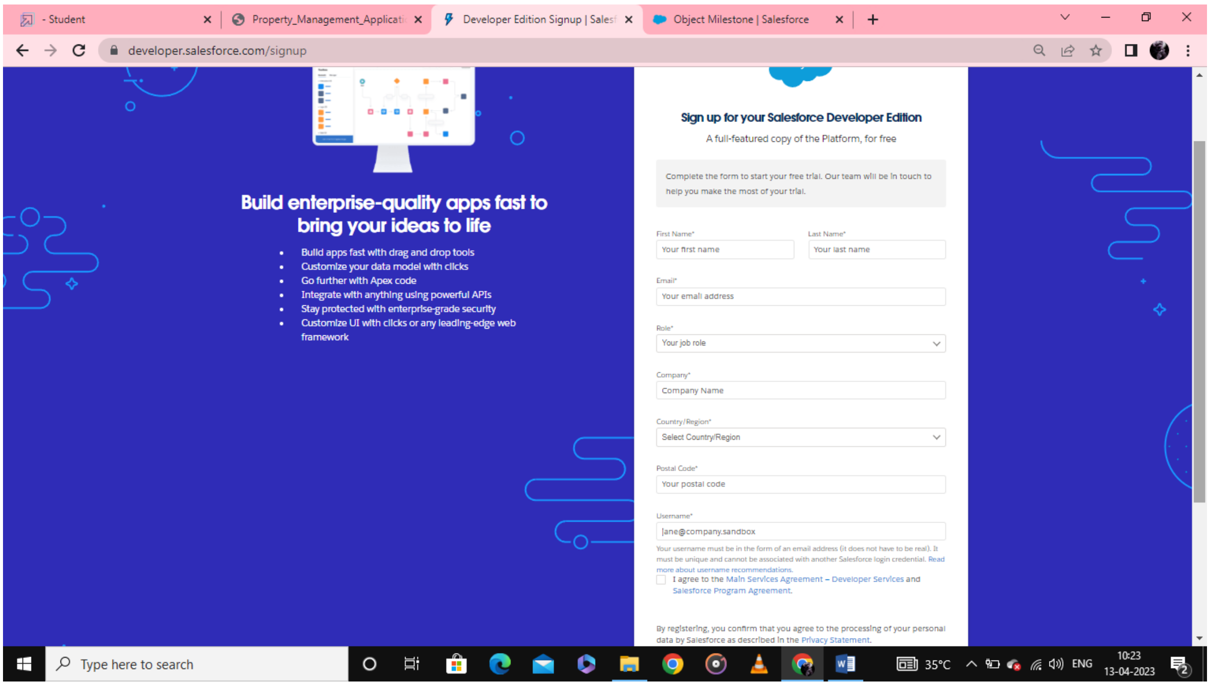
3.1 DATA MODEL:

OBJECT NAME	FIELDS IN THE OBJECT	
Buy	FIELD LABLE	DATA TYPE
	Property Type	Picklist
	Discount	Percentage
	State	Picklist
	City	Field Dependency
	Annual Amount	Currency
Rent	FIELD LABLE	DATA TYPE
	Rent	Auto Number
	Rental City	City
	BHK Type	Picklist

	FIELD NAME	DATA TYPE
Loan	Loan ID	Auto Number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total Loan Instalments	Number
	Loan Repayment	Number
	Loan Amount	Formula

3.2 ACTIVITY & SCREENSHOT

Creating a Salesforce Development Org:



1. Go to developers.salesforce.com/

2. Click on sign up.

3. On the sign up form, enter the following details :

a. First name & Last name

b. Email

c. Role : Developer

d. Company : College Name

e. County : India

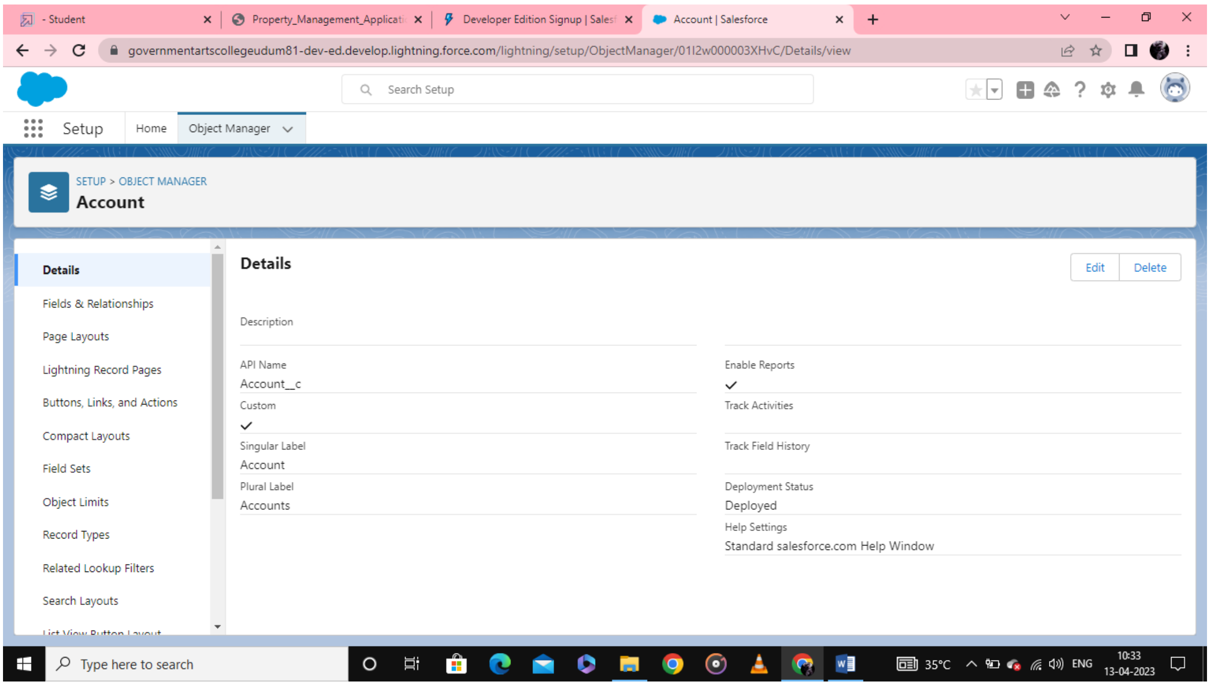
f. Postal Code : pin code

g. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

username@organization.com

CREATION OF OBJECTS FOR PROPERTY MANAGEMENT:



1. To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

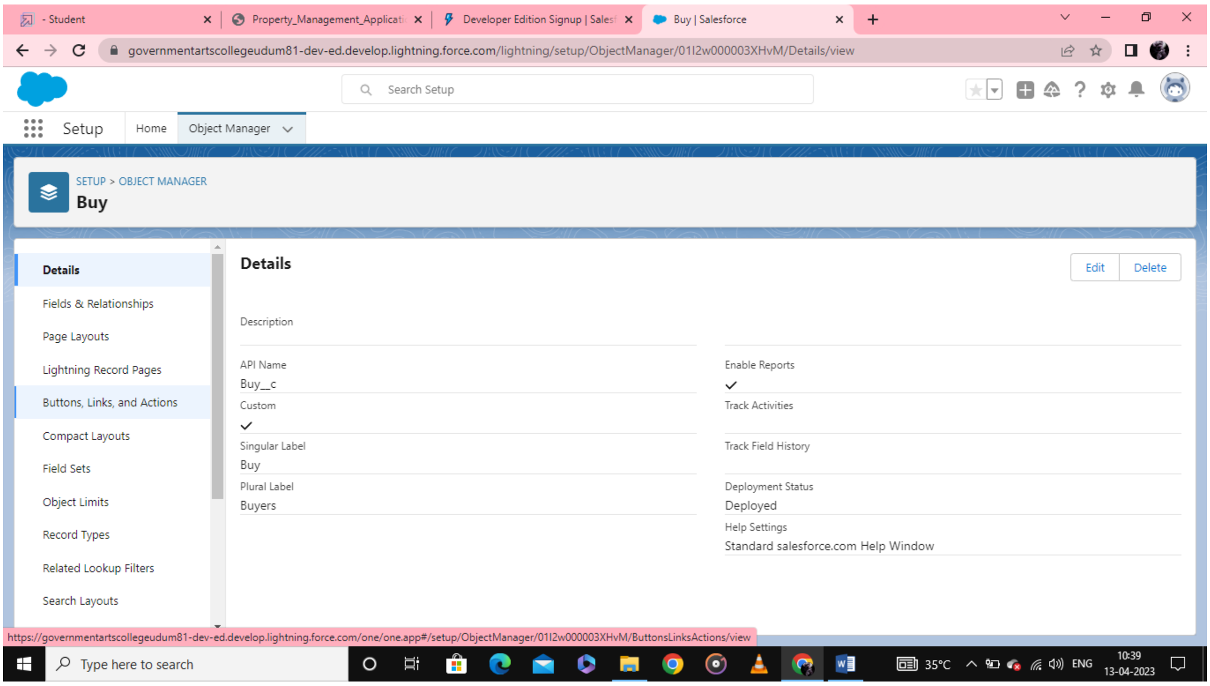
3. Enter the label name → Account

4. Plural label name→ Accounts

5. Click on Allow reports,

6. Allow search → Save

CREATION OF BUY OBJECT:



1. To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

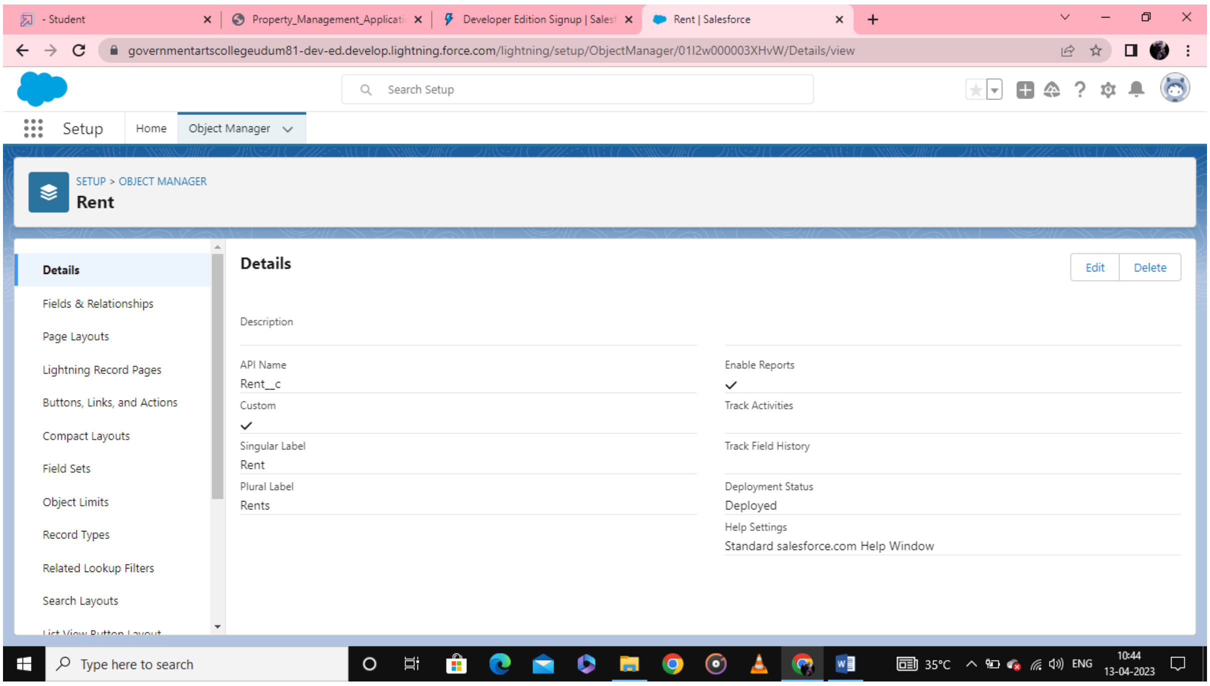
3. Enter the label name →Buy

4. Plural label name→ Buyers

5. Click on Allow reports,

6. Allow search → Save

CREATION OF RENT OBJECT:



1. To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

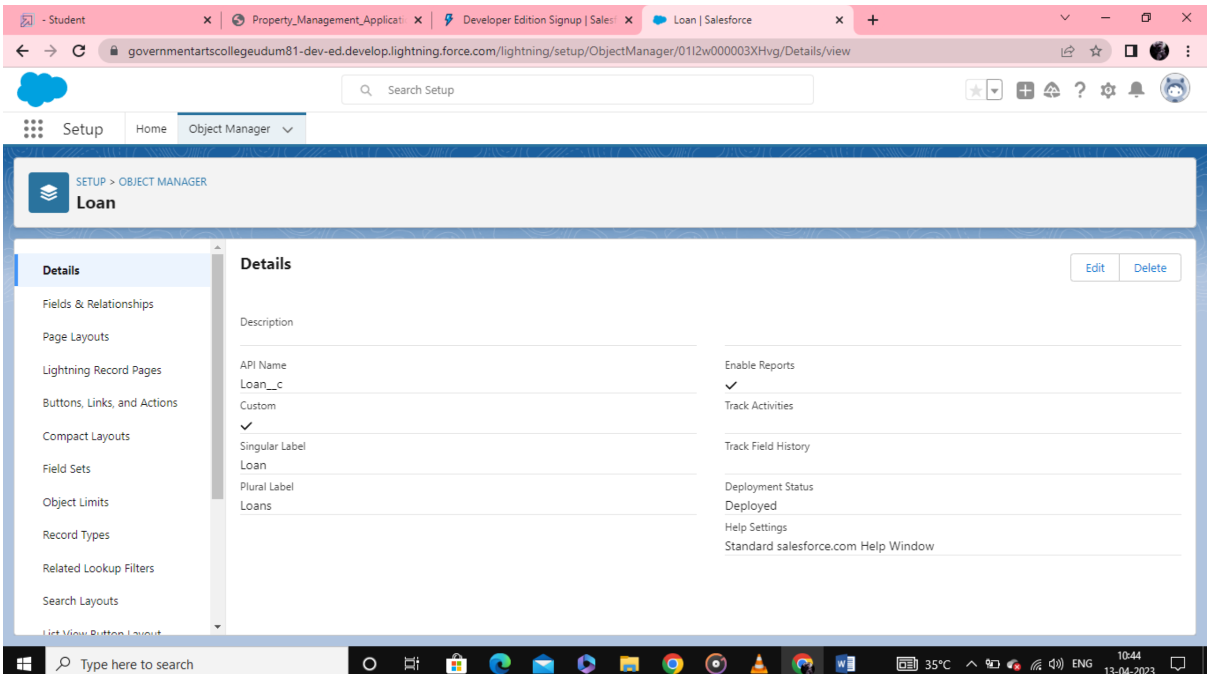
3. Enter the label name →Rent

4. Plural label name→ Rents

5. Click on Allow reports,

6. Allow search → Save

CREATION OF LOAN OBJECT:



1. To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

3. Enter the label name →Loan

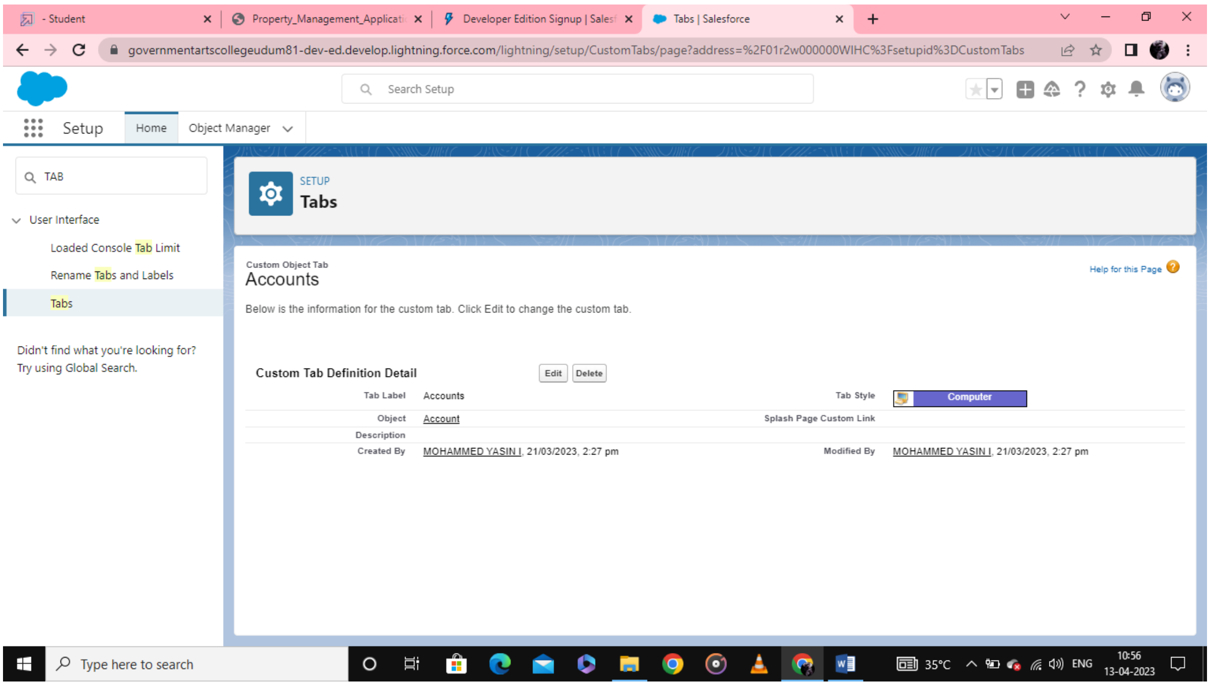
4. Plural label name→ Loans

5. Click on Allow reports,

6. Allow search → Save

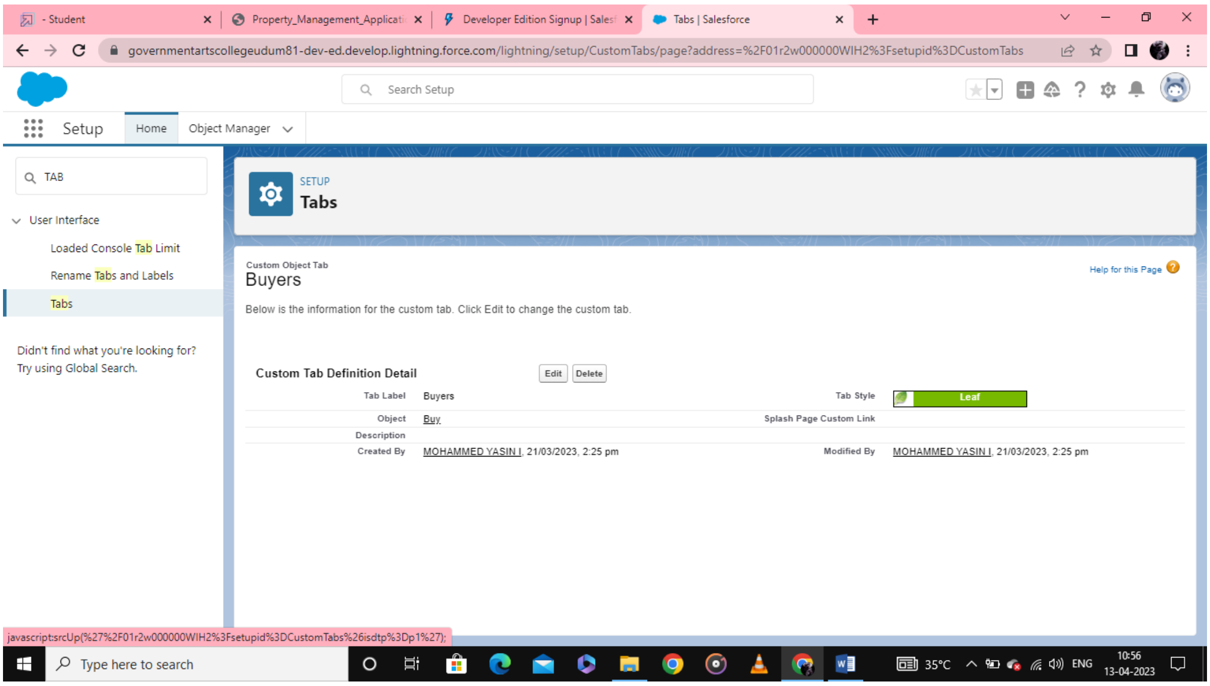
TABS:

Creation of Account Tab:



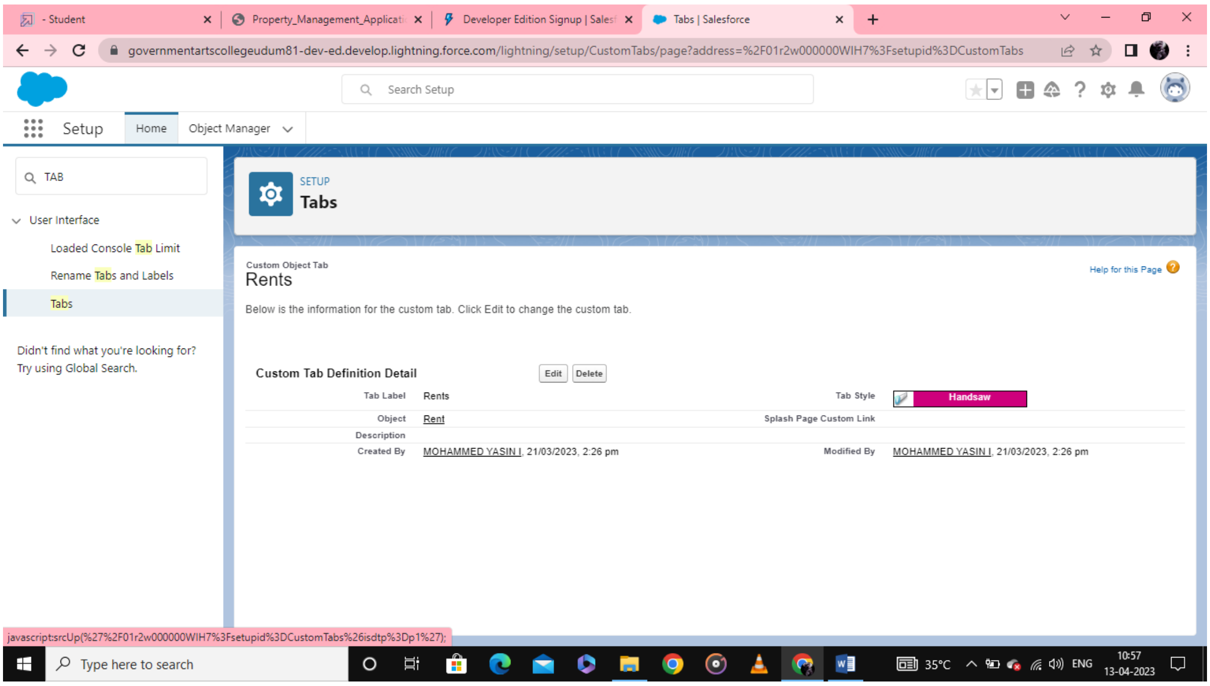
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab) 2. Select Object (Account) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.

CREATION OF BUY TAB:



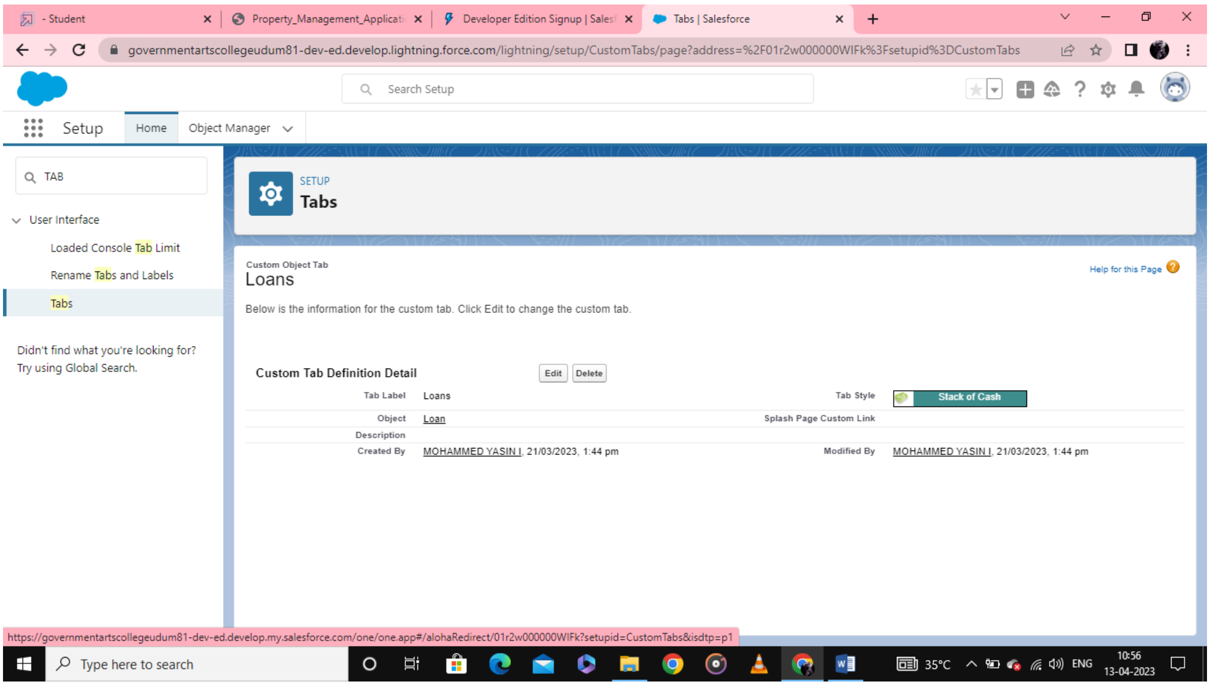
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)2. Select Object (Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.

CREATION OF RENT TAB:



1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object (Rent) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.

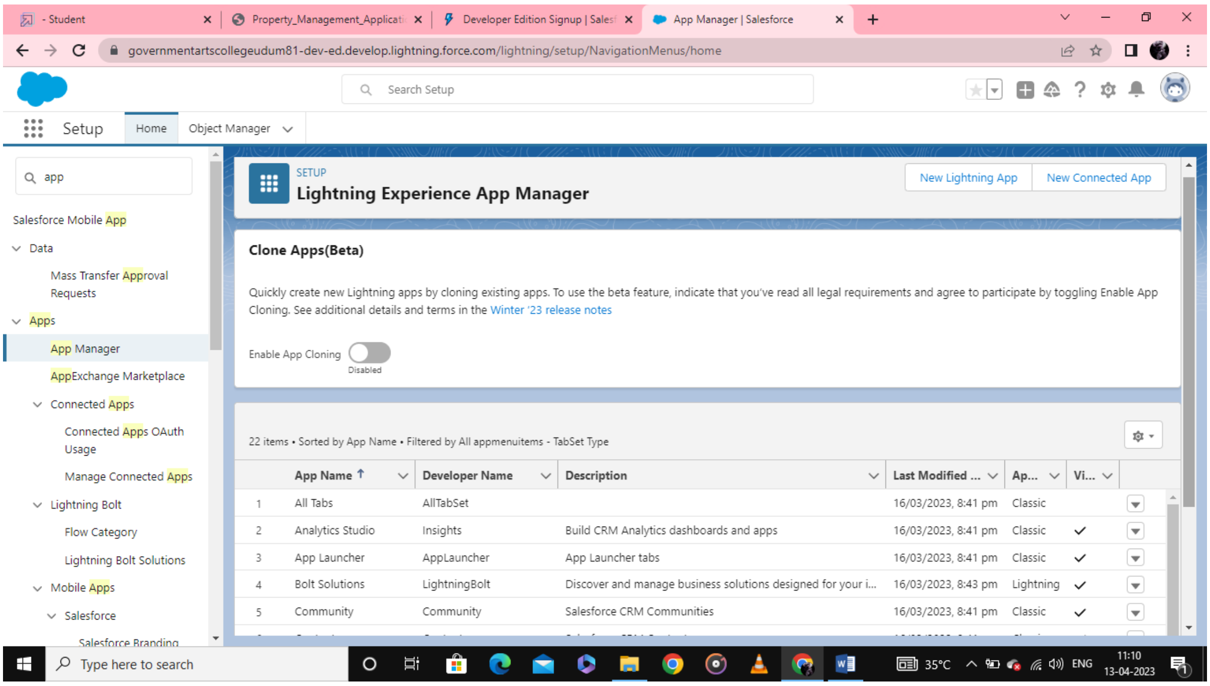
CREATION OF LOAN TAB:



1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object (Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save

LIGHTNING APP:

Creating the Lightning app:



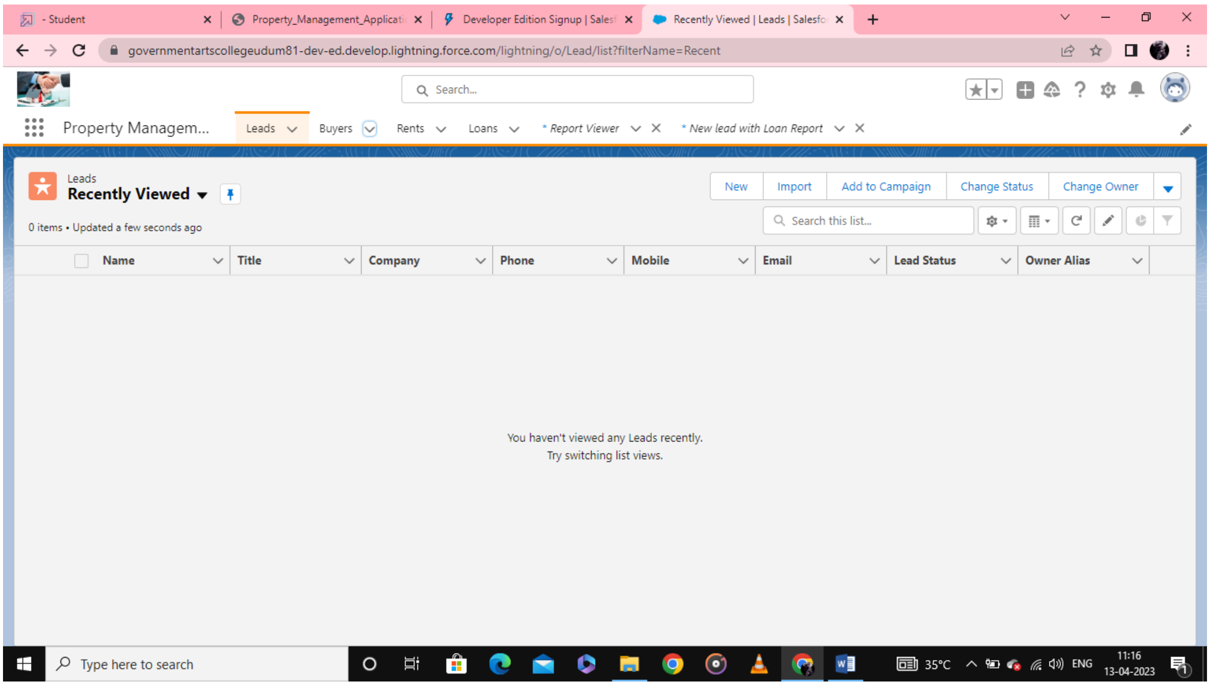
1. Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.

2. Fill the app name as an Property Management in app details and branding →Next → (App option page) keep it as default → Next

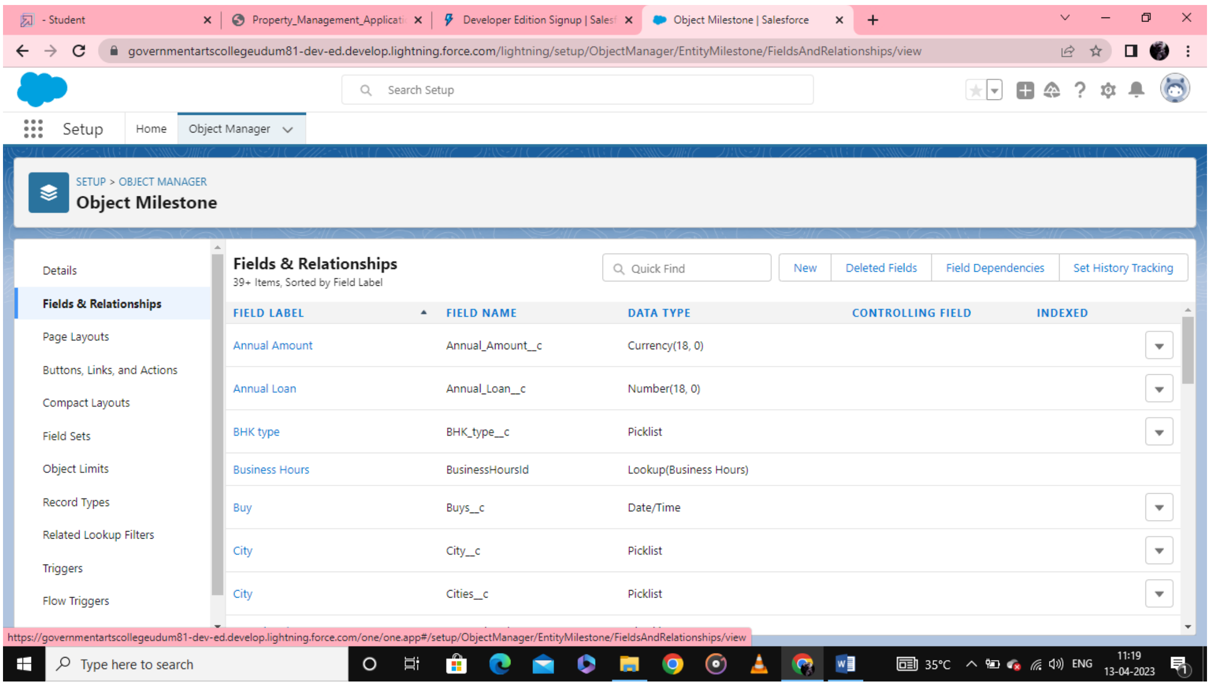
3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy, Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce platform user, Standard User → Next.

4. To Add Navigation Items: Select the items from the search bar and move it using the arrow button → Next.

5. To Add User Profiles: Search profiles in search bar → click on the arrow button → save & finish.



FIELDS:

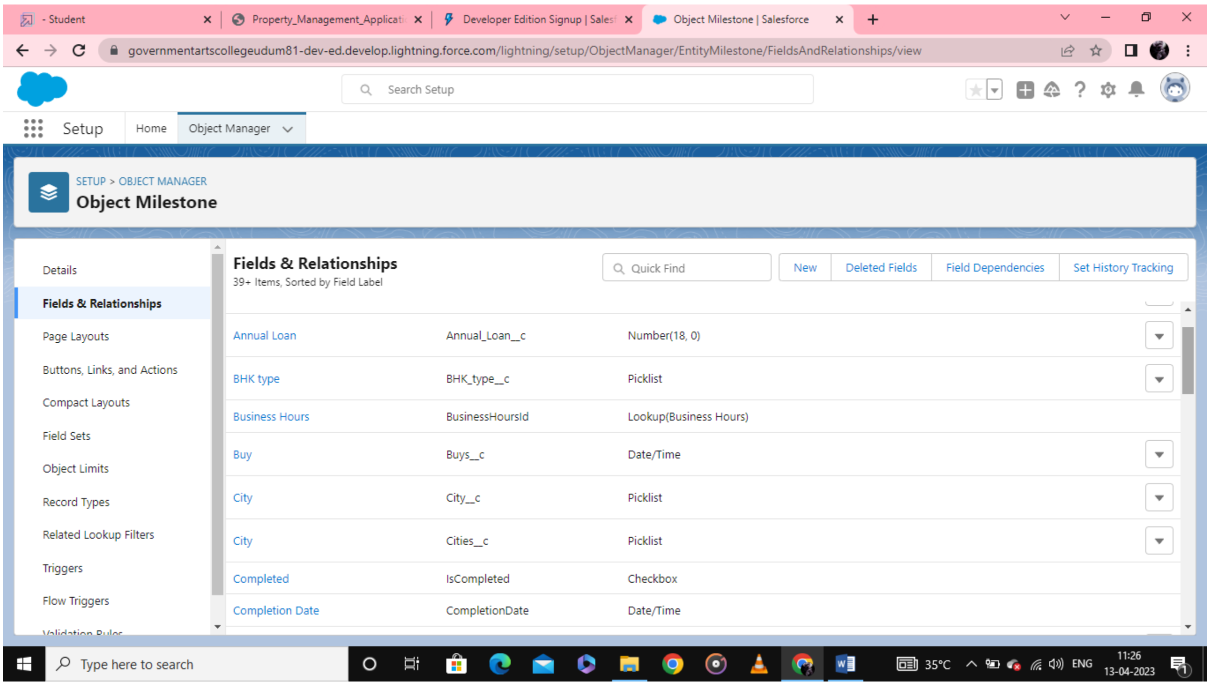


1. Go to setup → click on Object Manager → type object name in search bar → click on the object

2. Now click on "Fields & Relationships " → New.

3. Fill the field label name Lead → Next → Next → Save.

CREATION OF BUY FIELD:



1. Create Field for Buy

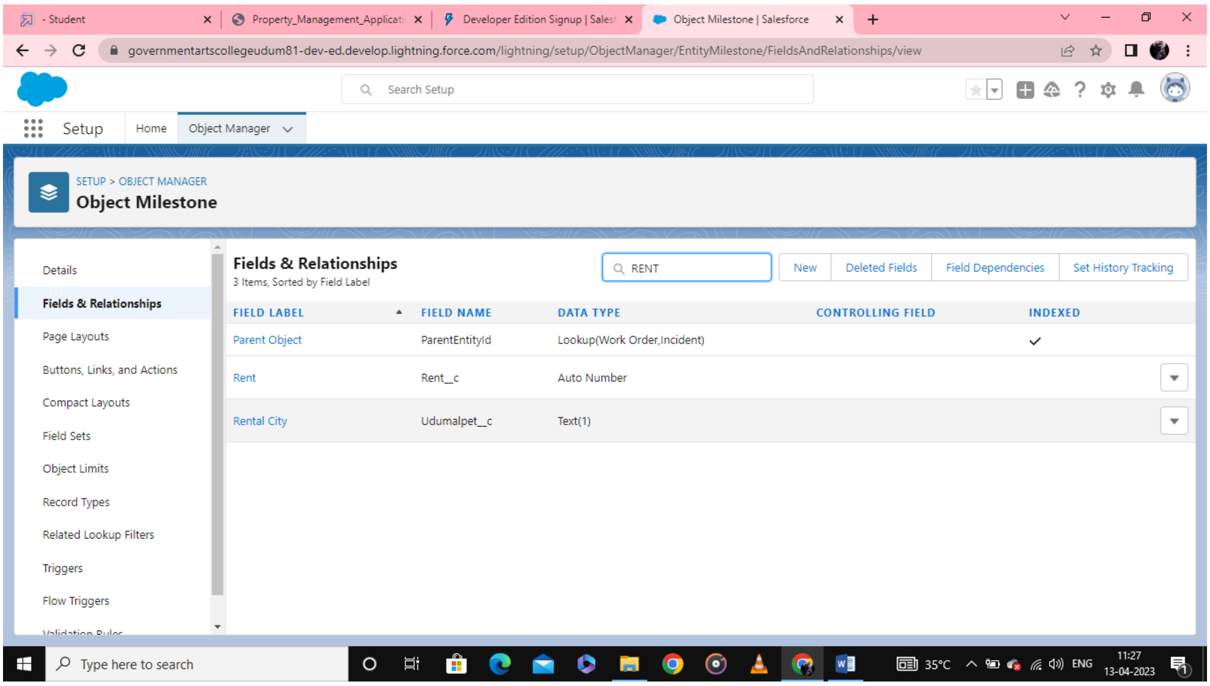
2. Create Property Type: (Picklist) (Residential, Commercial, Industrial)

3. Discount: (Percentage As the Field Data Type)

4. State: Create the Picklist Field (Maharashtra, Gujarat, Rajasthan) (Field Dependency)

5. City: (Take Any City for Field Dependency) 6. Annual Amount To Be Paid.

CREATION OF RENT FIELD:

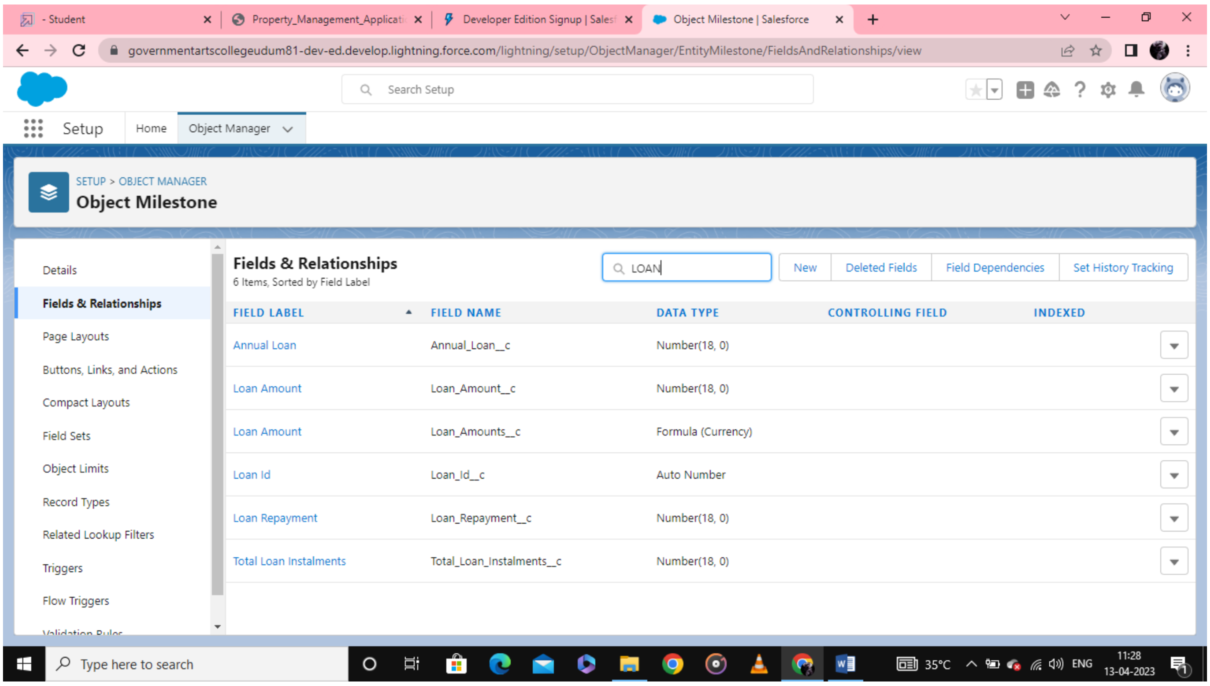


1. Rent: (Auto Number while Creating the object) → R-{0000}

2. Rental City: Select the Text as the Field Data Name (Any City)

3. BHK type: (Picklist) (1BHK, 2BHK, 3BHK).

CREATION OF LOAN FIELD:



1. Loan Id: Auto generated Field Take it as Auto number LN-{0000}

2. Interest Rate: (Select the Field Data Type as Currency)

3. Term: (Select the Field Data type as Number)

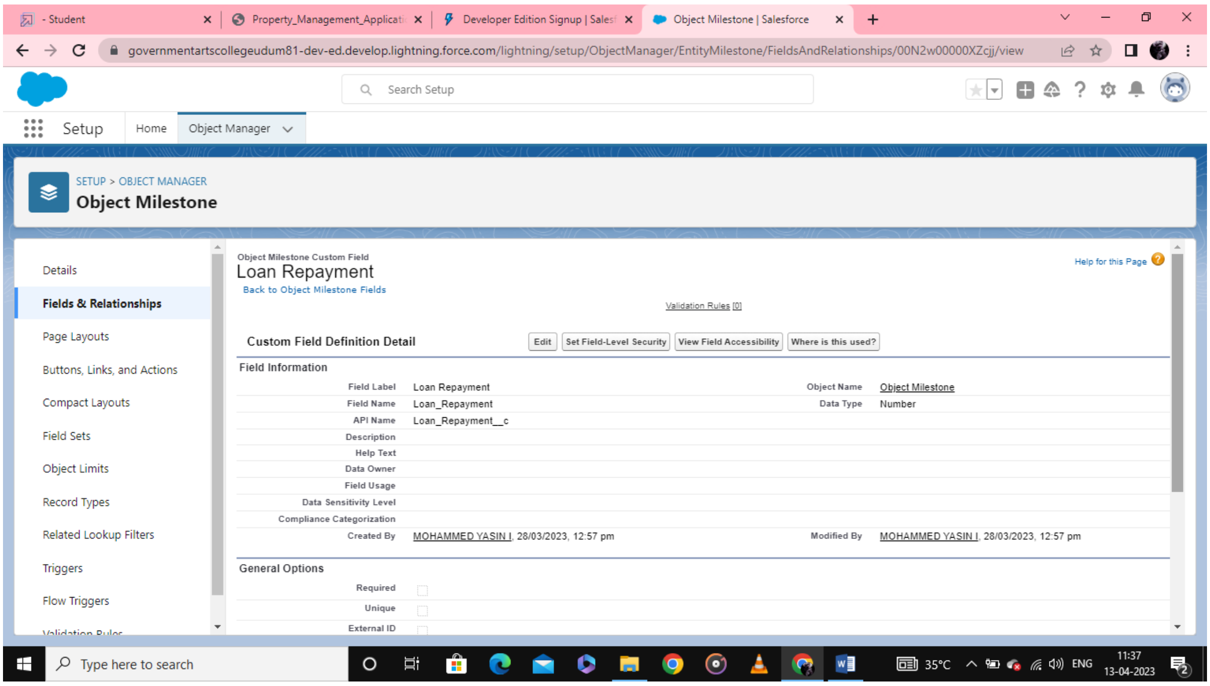
4. Annual Loan Field create the Number as the field data type

5. Total Loan Instalments: (Field create the Number as the field data type)

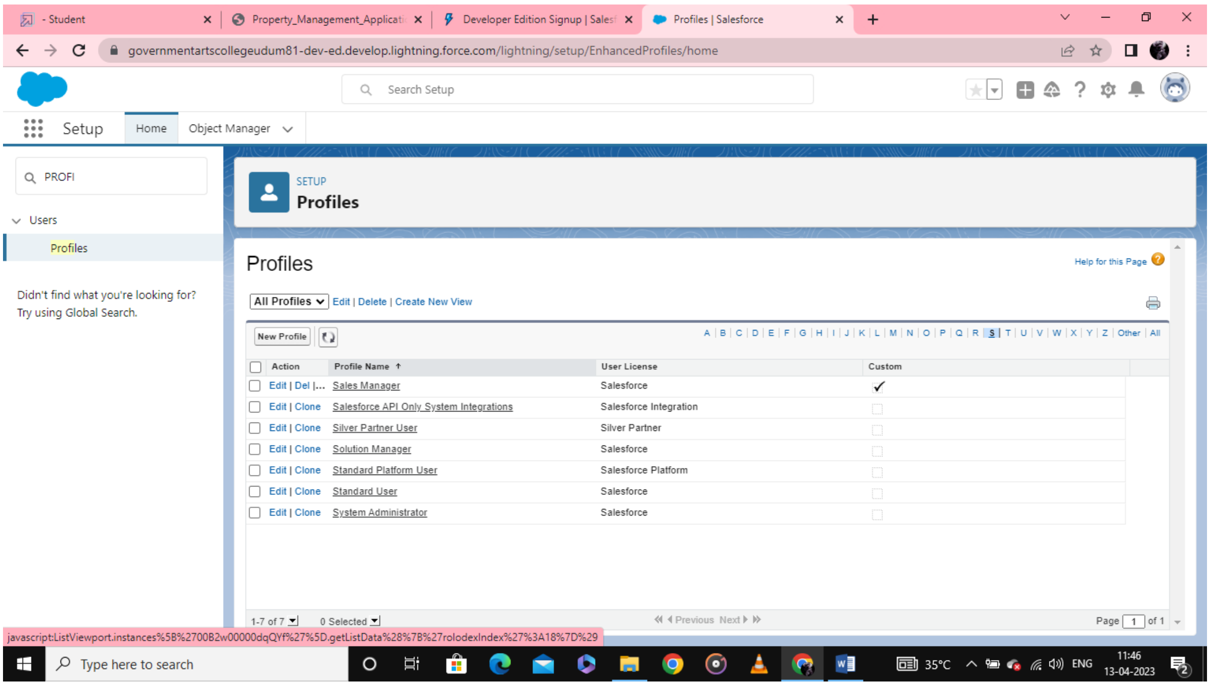
6. Loan Repayment (Field create the Number as the field data type)

7. Loan Amount (Select the Field data type as Formula).

8. For the Loan Object→ Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula (Loan_Repayment__c * (((1+(Interest_rate__c /52))^ Term__c) -1))/((Interest_rate__c /52)*((1+(Interest_rate__c /52))^ Term__c)) ##Check the syntax below whether the formula syntax is correct or not.



PROFILES:



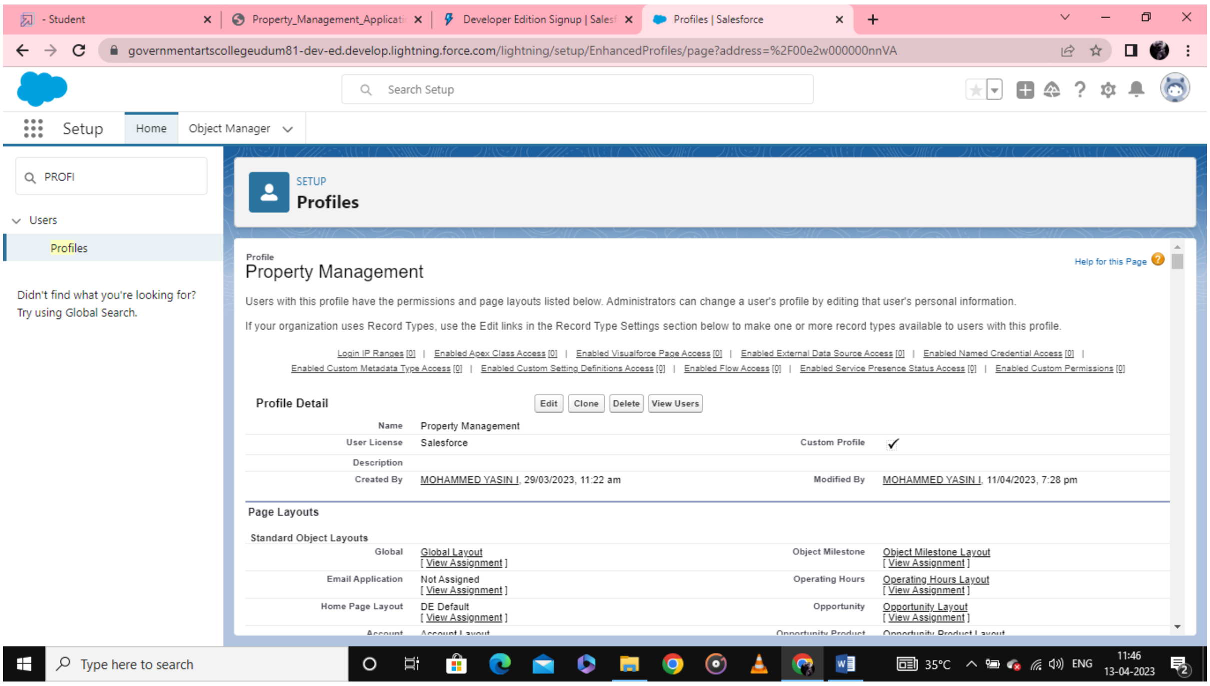
1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (standard user is preferable) → enter profile name → save.

2. .Enter a Profile Name: Property Management.

3. Click on the new created profile

4. While still on the profile page, then click Edit.

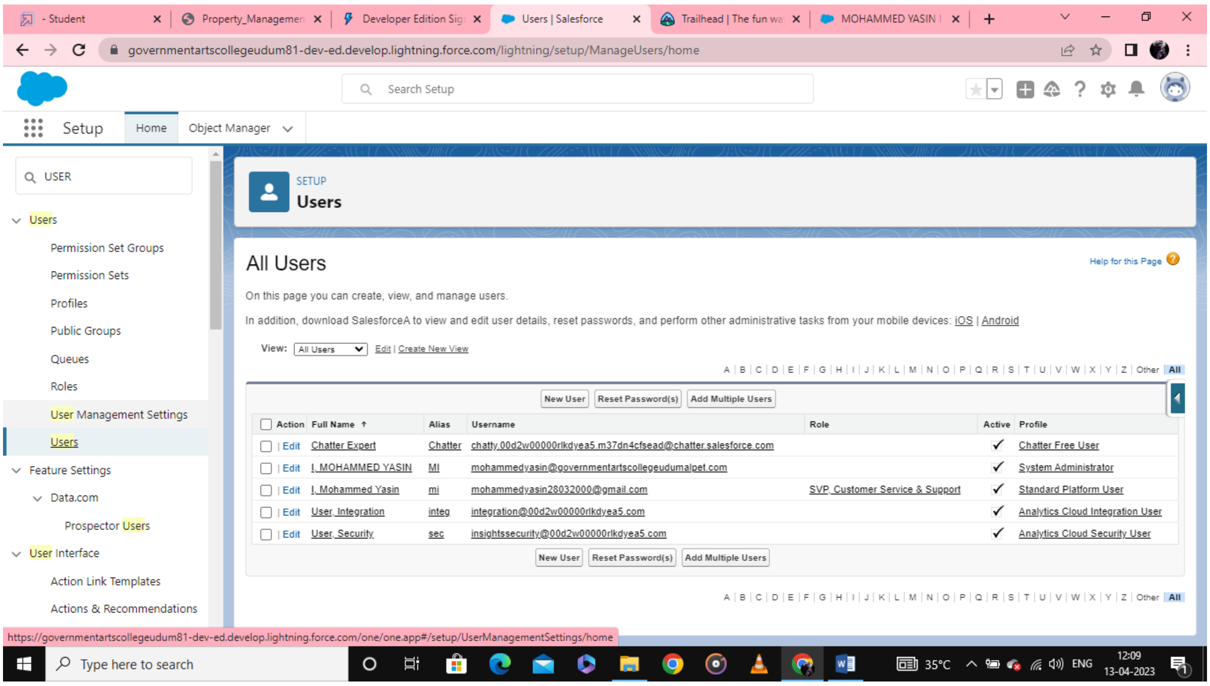
5. Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile



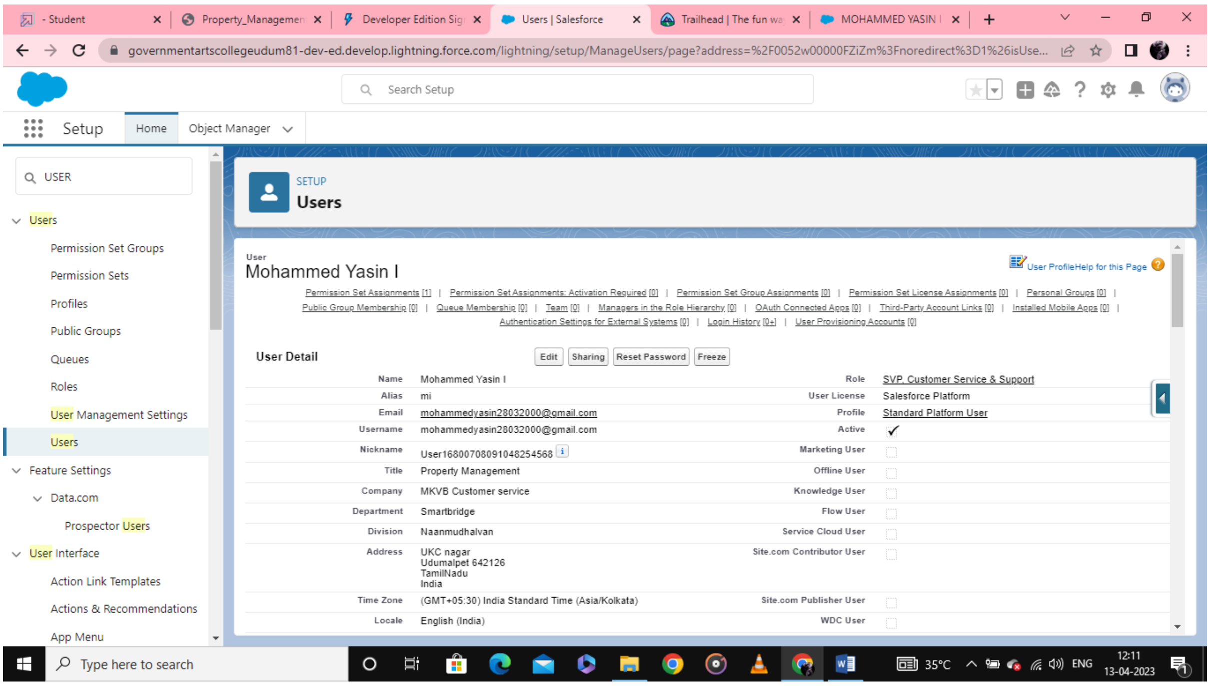
6. Sales Manager →Standard user Profile, Marketing Executive1 and Executive2→Standard Platform User, Marketing Manager →Standard Platform User For.

NEW USER:

1. Go to setup → type users in quick find box → select users → click New user.



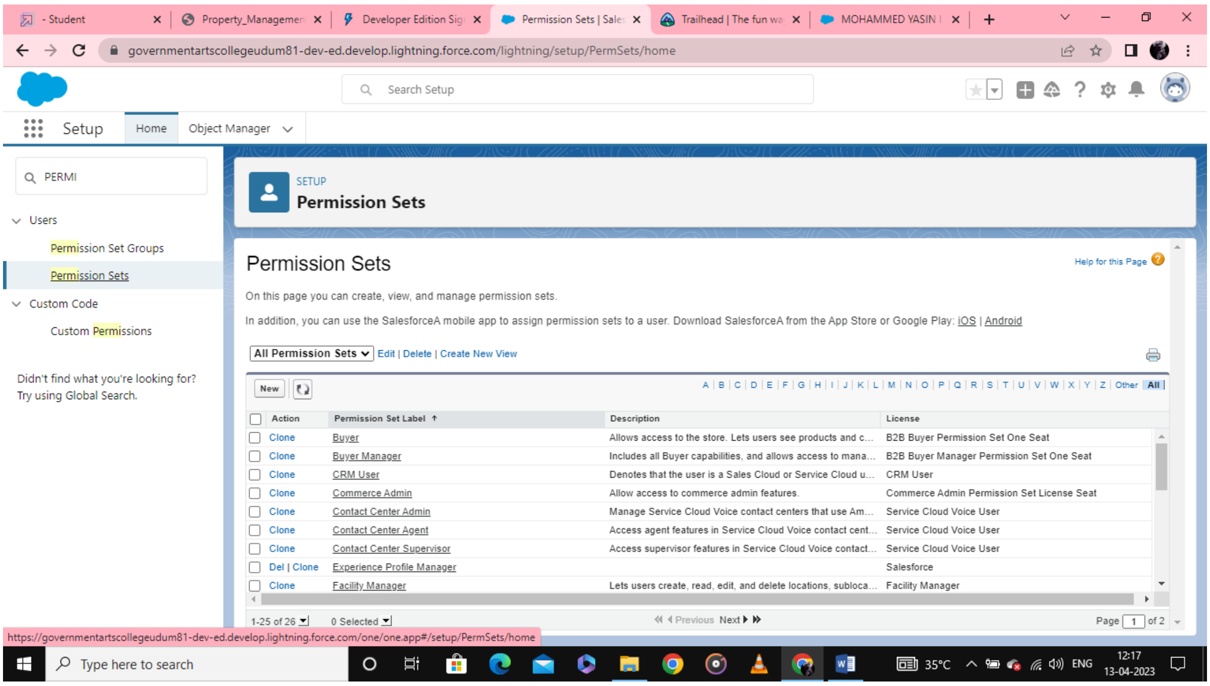
2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.



PERMISSION SET:

CREATION THE PERMISSION SETS:

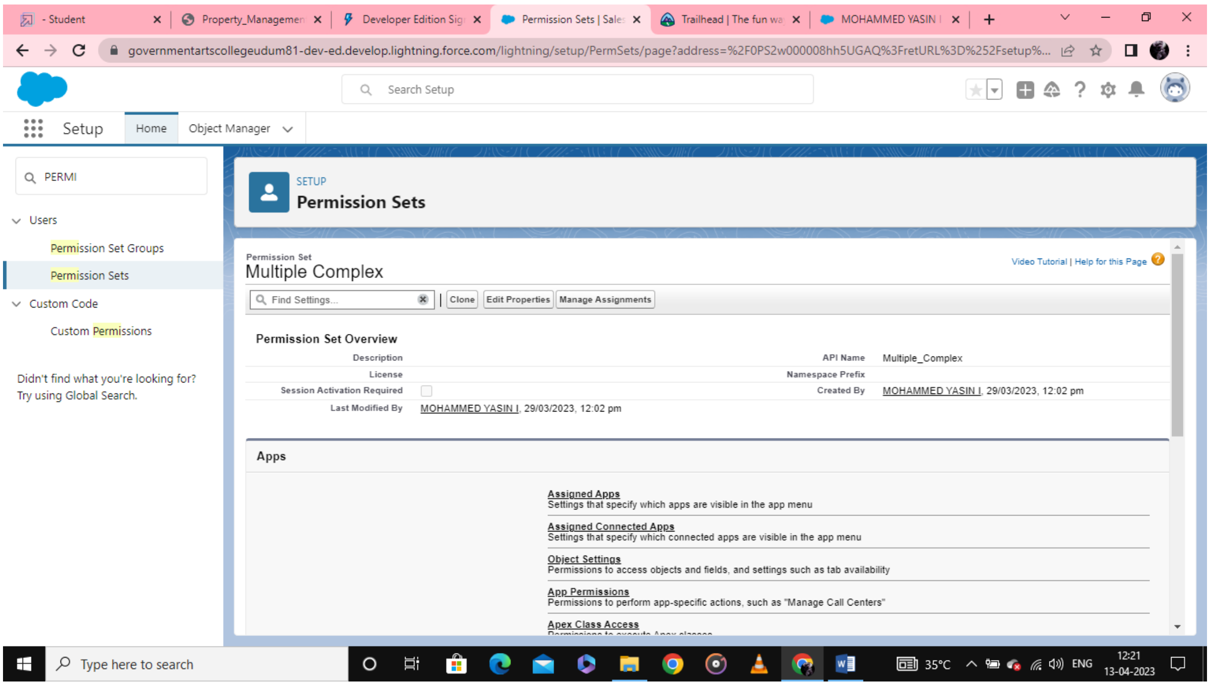
1. Go to setup → type “permission sets” in quick search → select permission sets →New



2. Enter the label name → save

3. After saving the permission click on the Manage assignment

4. Now click on the Add Assignment



5. Now select the users and click on save 6. Go to permission set and add the access For Sales Rep3 give Access with Create permission for the User

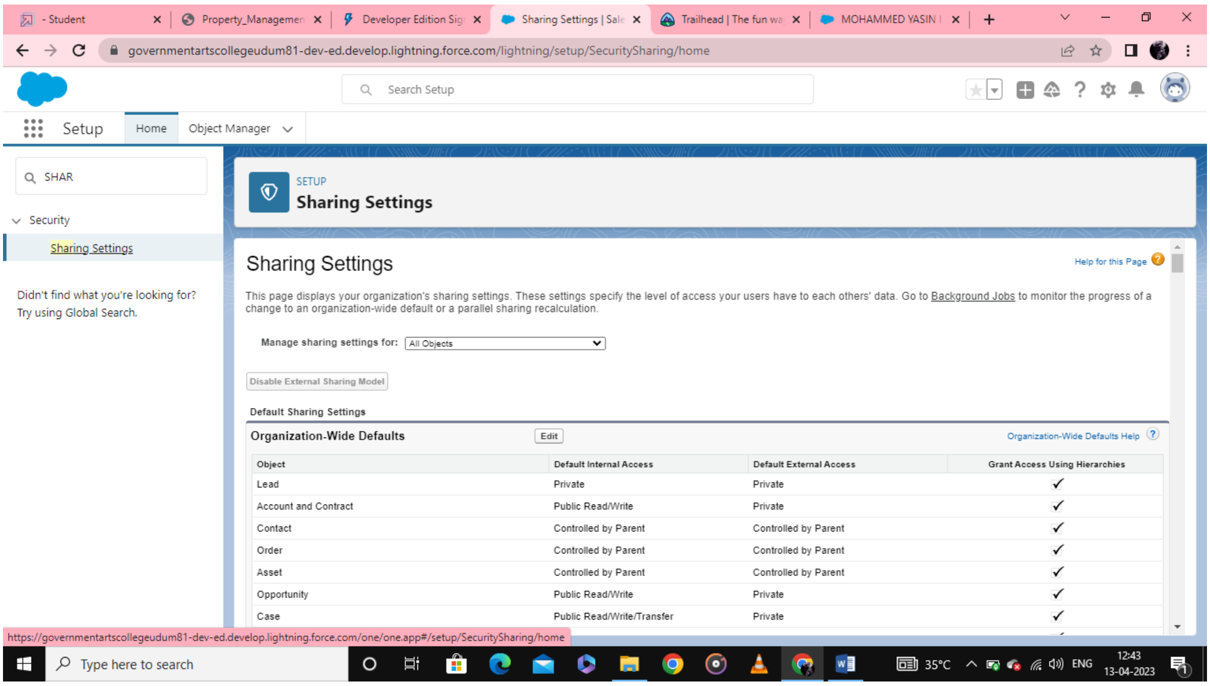
SETUP FOR OWD:

CREATION OF OWD SETTING:

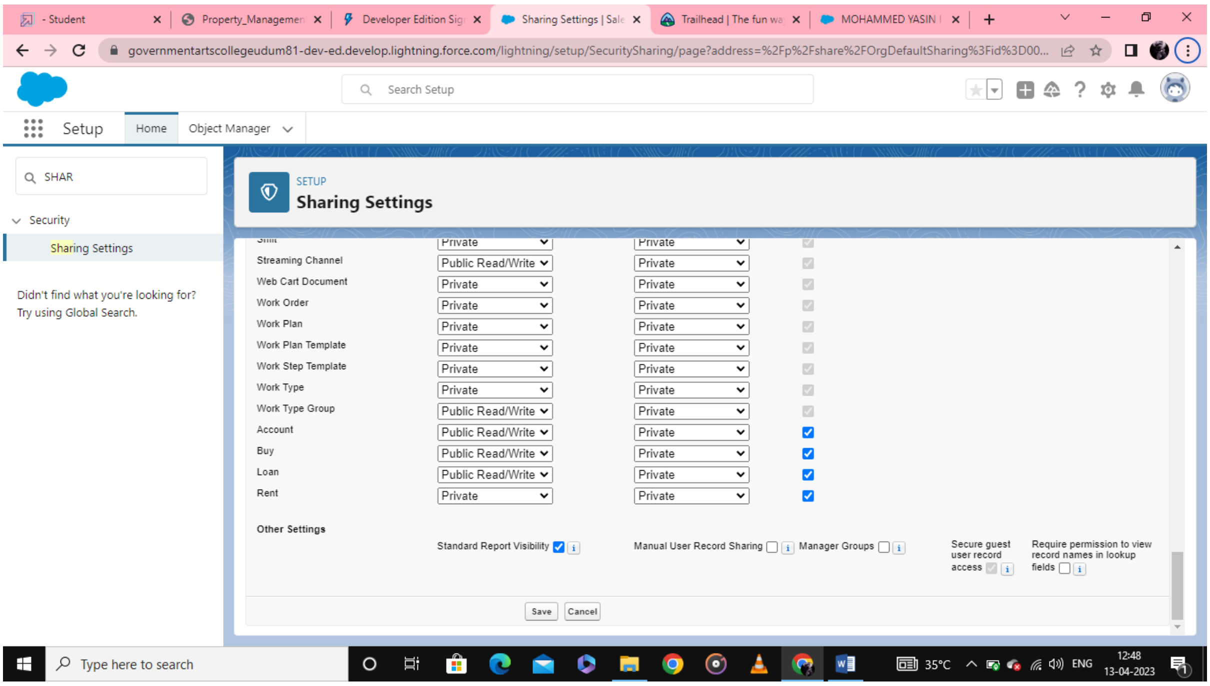
1. Setup, use the Quick Find box to find Sharing Settings.

2. Click Edit in the Organization-Wide Defaults area.

3. For each object, select the default access you want to give everyone.
4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Lead, Rent custom object



5. Click Edit and from the Drop Down select private for internal and external

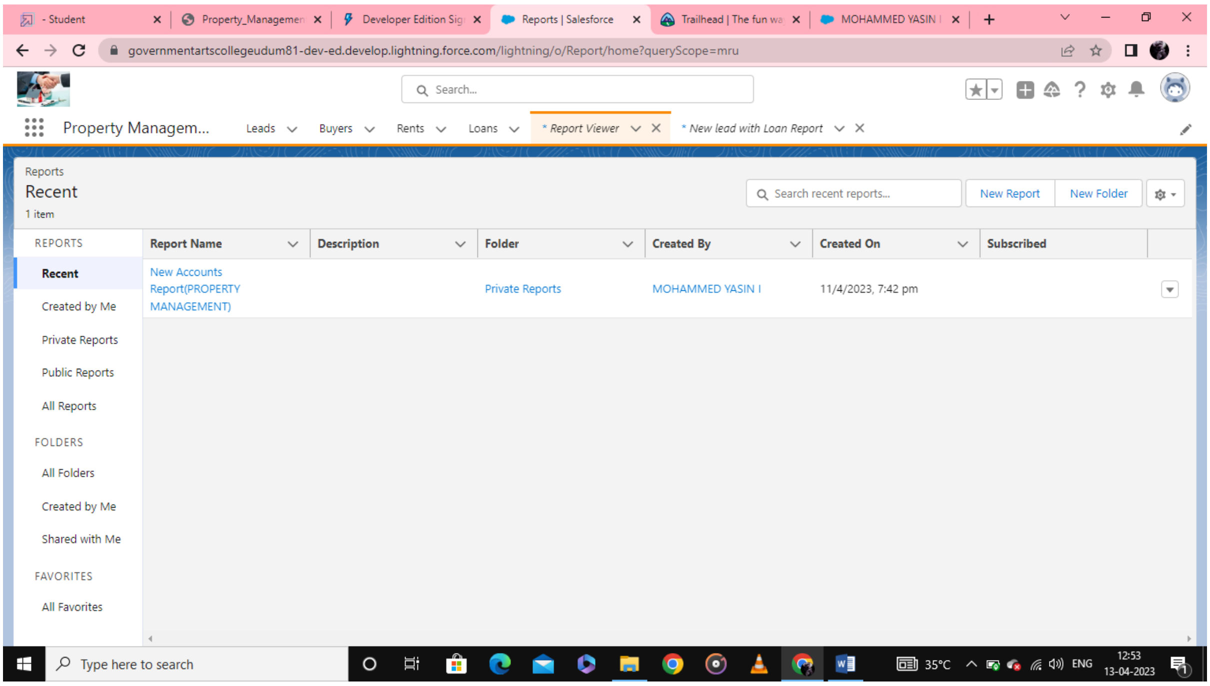


6. This Setting is for all the User which have been Created

REPORT:

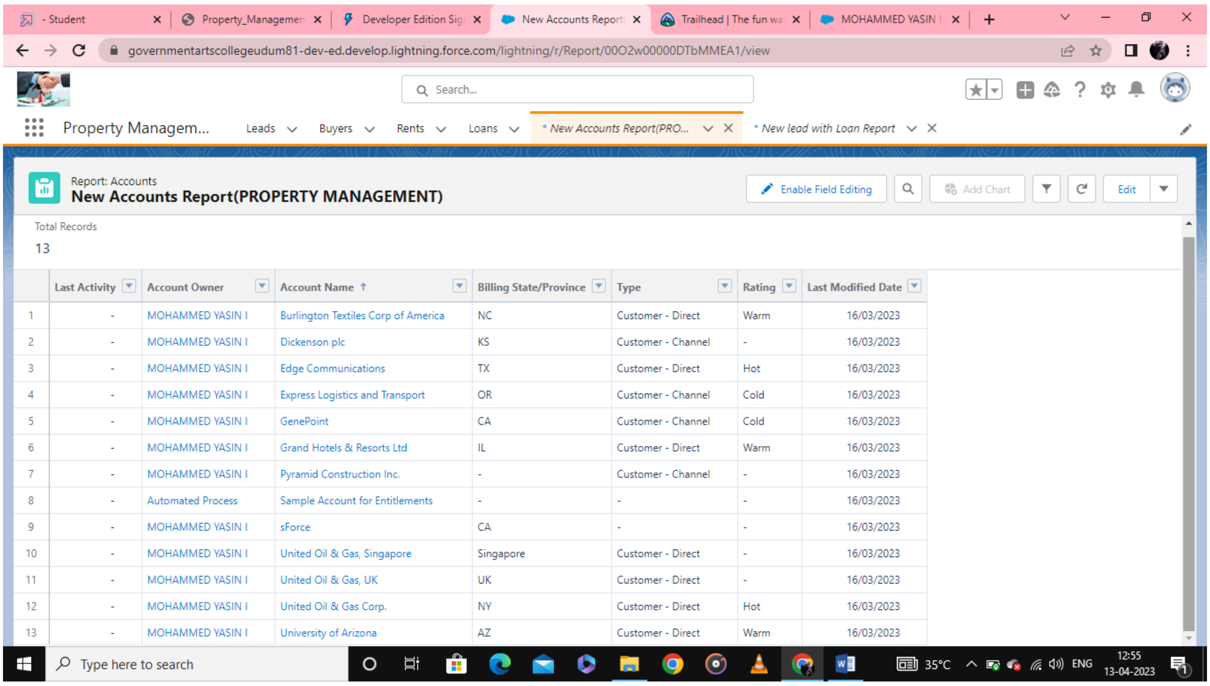
CREAT A REPORT:

1. Go to the app → click on the reports tab



2. Click New Report

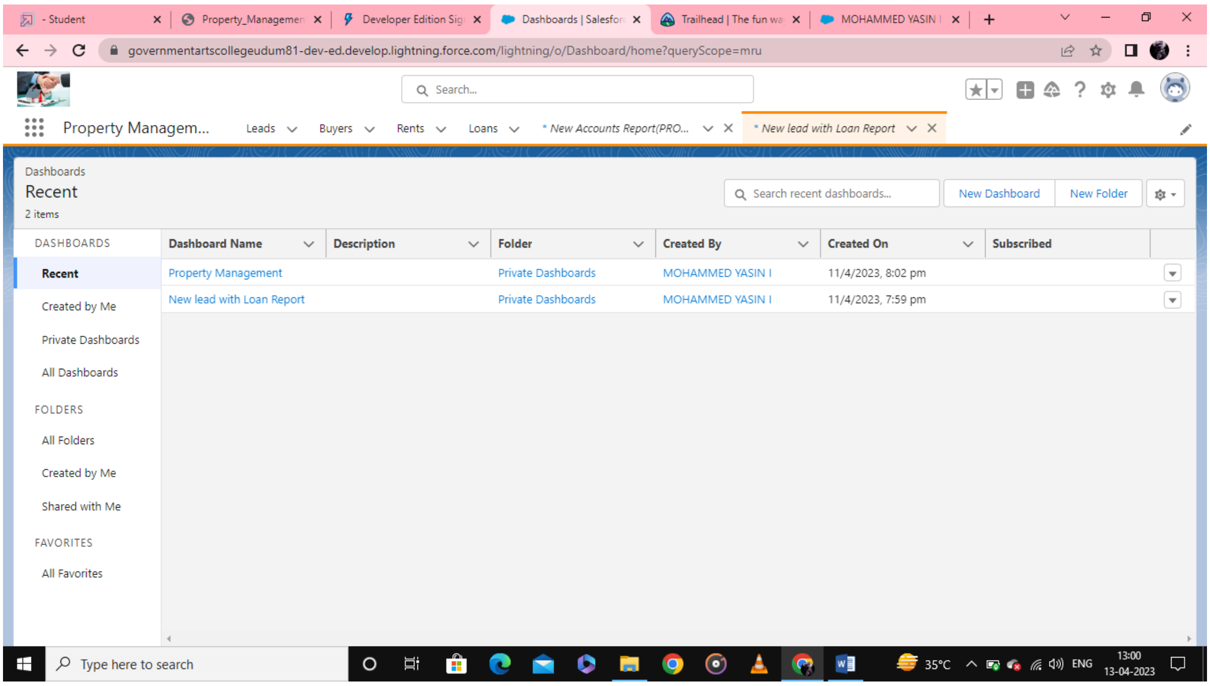
3. Select report type from category or from report type panel or from search panel → click on start report.



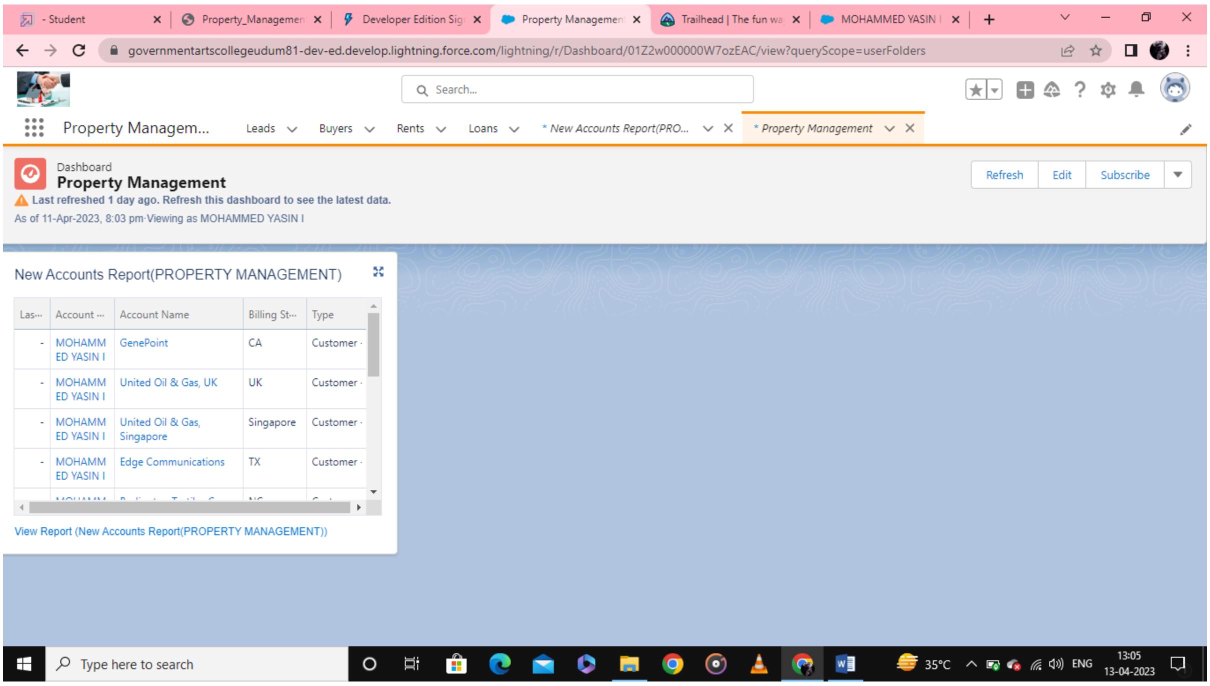
4. Customize your report, then save or run it.

DASHBOARDS:

1. Go to the App Launcher and select the Dashboards
2. Select add component



3. Select the folder select the following option new lead with loan Amount



4. Select in which format you want display chart or table.

4. Trailhead Profile Public URL

Team Lead – https://trailblazer.me/id/mohai4

Team Member 1 – https://trailblazer.me/id/vadim64

Team Member 2 - https://trailblazer.me/id/kuppn

Team Member 3 - https://trailblazer.me/id/bala9566

PROJECT REPORT TEMPLATE

5. ADVANTAGES & DISADVANTAGES:

Advantages

Whether it’s a multi-story hotel in a busy market or a small property in a beautiful rural town, using a property management system has many advantages. You’ll be able to streamline your operations, offer comprehensive training to your staff and ensure guests have a positive, stress-free experience.

A major advantage of a property management system in a hotel is having access to all of your information in one place, whether you’re onsite, at home or out of town. Because many property management systems operate via the cloud, you’ll have access to your information through all your devices. From a computer, tablet or smartphone, you’ll be able to pull up information in real-time, including inventory, revenue, personnel information, accounts payable and receivable and more.

Being able to manage from anywhere means you’ll be able to boost your sales on the fly. Just heard about a music festival in town that’s sure to draw a crowd? Log into the property management system and adjust your rates to take advantage of early bookings and foot traffic on the day of the event. Increased traffic means you may need to increase staff – the property management system allows you to revise the employee schedule at any time.

You’ll save time and money by being more efficient

The number one job of an employee in the hospitality industry is to provide excellent customer service to guests. When employees spend hours on routine tasks such as reservation management, scheduling, housekeeping assignments, maintenance requests and other manual administrative tasks, guest services can suffer.

A property management system is integrated into every department within a hotel, allowing you to communicate effectively with both employees or outside contractors while keeping an eye on revenue, inventory, or sales.

Automating routine tasks can save time for both you and your employees – housekeeping assignments, maintenance requests, reservation manifests and nightly audits are available at the touch of a button.

Disadvantages

While a property management system may ultimately help your business run more smoothly, it's important to consider the disadvantages to determine if it's right for your property before investing.

You'll be dependent on one vendor

Property management systems allow you to connect every aspect of your business through one application. However, this may make it more difficult to use other third-party products that may be more useful to your business, such as payroll or accounting programs.

While some property management systems may allow integration with third-party products, the implementation is not always smooth and may cause both products to have operational issues. You may need to purchase additional products later if you want to add services that your software vendor doesn't offer, such as self-check-in kiosks, email marketing databases or guest communication platforms. If you choose different vendors for these products, you'll be back to managing several different systems instead of one property management solution.

Cost can be prohibitive in the beginning

If you're a small, family-owned business in a non-tourist destination, it can be difficult to come up with the cash for an all-in-one property management system right away. Over time, these solutions pay for themselves in saved time and increased bookings, but you'll want to make sure you choose the right product for your type of business.

Because the software is often proprietary and may not accept or play well with other tech products, you may be forced to abandon your property management system if it doesn't work for you, or spend more money to find a more appropriate solution.

APPLICATIONS:

o Provides a management model. The application takes into consideration the best management practices, which allows it to consolidate the way in which its team of collaborators works and carry out a more complete and detailed management.

o Everything in one single system. Integrates in one single application the modules that usually exist separately. The client accesses all the modules that it needs to manage the real estate business in an integral manner.

o Maximum availability and security. The application is built and operates with the best technology in the world: Salesforce.com

o Permanent access from anywhere. Access to the application at anytime from anywhere and with any device connected to Internet. (Smartphone, Tablet, PC).

o Your needs are personalized. You can create new fields and eliminate the ones unused. You can create new sections and reorder the fields.

o Adjust language. All names and field labels can be changed to allow for the personalization of each company or country.

o Allows the creation of any report. It can create and modify any report, include filters, change columns, order in any criterion and go to Excel.

o Allows to send emails. It creates and sends emails from the application that are received as if they had been sent from their own electronic mail source.

o Allows to create recurring emails in template mode, which allows to send email created automatically.

o Generation of alarms. Allows the configuration of workflow that generates alarms for incoming email or reminders of certain dates such as expirations or renewals.

o User profiles. Users may access information according to the profiles that they have assigned and which are defined by the Administrator.

o Information backup. Automatic programmed backup so that the client may have a copy of all the information registered in the system.

o Chatter. Internal chat allows instant communication among users and mailing attachments.

CONCLUSION:

In conclusion, Property Management System (PMS) software is very crucial for all the Hotels. Especially Opera PMS constitutes the most appropriate PMS software for Hilton Athens. It is user friendly, connects with Central Reservation System (CRS), Point of Sale (POS) etc. and provides all the tools the hotel needs in order to operate effectively.

Property manager or company will make sure tenant screening also takes care and gives assurance for safety of property, also maintenance is one of the headaches for owners which is also sorted by property managers or management companies as they handle all the problems that arise on the property.

Property management requires people from all different backgrounds to work as a high performing team. As the owner of the firm and senior leader, I must be committed to diversity by removing my bias about young women and men. Now that I am aware and acknowledge my bias, I can develop a strategic plan that aligns with the firm’s goals. Social media can encourage prejudice therefore it should not be the primary source of identifying candidates. Hiring human resources professional to screen resumes and participate in interview selections will also help mitigate bias in the firm. To create a competitive firm with growth and diversity, leaders must acknowledge their bias perceptions and find ways to eliminate them.

FUTURE SCOPE:

Over the last year, the National Association of Residential Property Managers (NARPM) has focused on the need for finding operational efficiencies. With automation forcing many industries to adapt and change to keep up and stay relevant, it was only a matter of time before it spilled over into the property management industry, too.

Tech has advanced to the point that certain jobs should become obsolete—so that we can focus our human resources on the tasks that tech will never be able to replace. Save your human touch for the details that matter, and embrace **property management automation** in the years to come.

What operational efficiencies can you bring to your business in 2020?

- Adopt marketing automation.
- Use self-showing solutions.
- Use a meeting scheduling system.
- Automate rent collection, leasing, and renewals.

- Use virtual assistants for tasks that require more than automation—but less than a property manager's attention.
- Offer tenants troubleshooting options for certain maintenance issues to save on service calls.
- Use your CRM for lead nurturing to set your sales team up for success.

By creating these efficiencies with **property management automation**, you can redirect your staff's potential to solving bigger problems:

- Remaining competitive in your pricing—and profitable at the same time
- Growing your business
- Providing better service.

Remain the company your clients want to work with when players with ample resources start looking at your market share and licking their lips. On that note, we come to the other side of the coin: which tasks still need "the human element?"