

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.

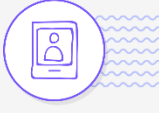
1.2 PURPOSE:

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.

2.1 EMPATHY MAP:

Template



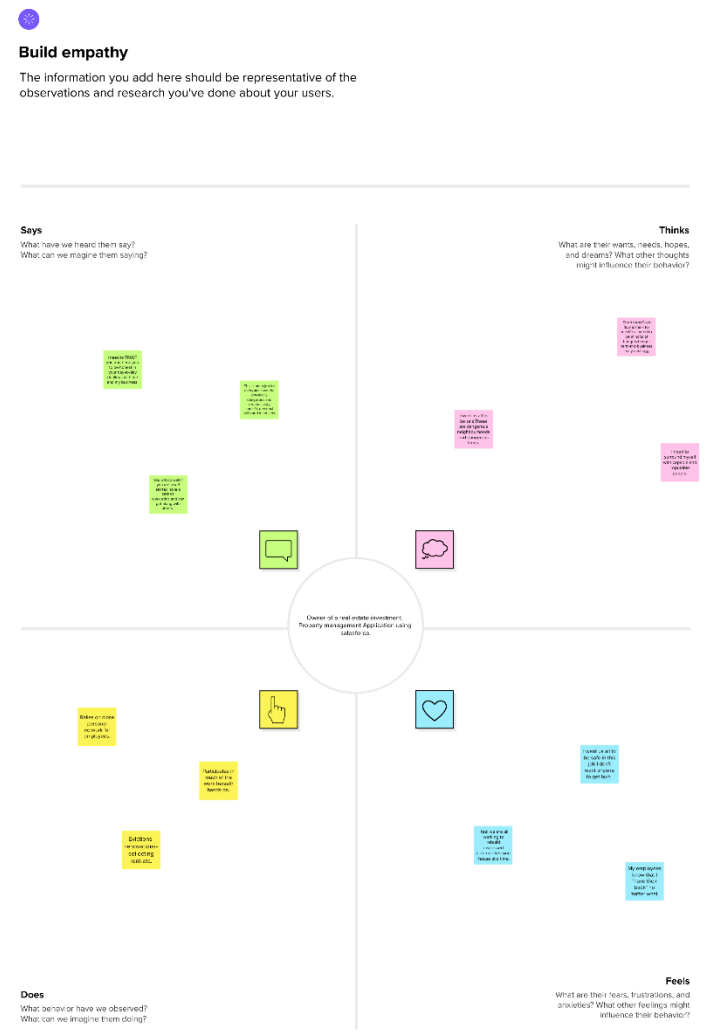
Empathy map


Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)

Build empathy

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



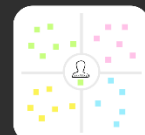
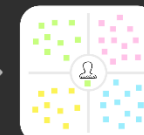




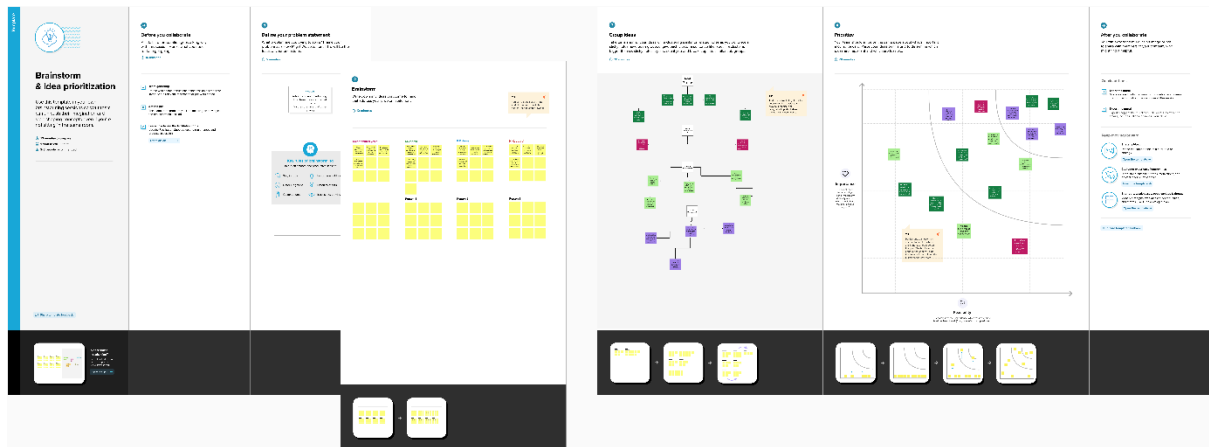
Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example →](#)


→

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2.2 Ideation and brainstorming map:



3 RESULT:

3.1 DATA MODEL:

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

Loan	FIELD NAME	DATA TYPE
	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:

The screenshot shows the Salesforce Developer Edition Signup page. The page is divided into two main sections. The left section, titled 'Build enterprise-quality apps fast to bring your ideas to life', lists several benefits of using Salesforce Developer Edition, including building apps with drag-and-drop tools, customizing data models, integrating with APIs, and ensuring security. The right section, titled 'Sign up for your Salesforce Developer Edition', is a form for creating a new developer organization. It includes fields for First Name, Last Name, Email, Role, Company, Country/Region, Postal Code, and Username. A checkbox for 'I agree to the Main Services Agreement' is located at the bottom of the form. The page is displayed in a web browser window with multiple tabs open, including 'Student', 'Property_Management_Applicati...', 'Developer Edition Signup | Sales...', and 'Object Milestone | Salesforce'.

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Select Country/Region

Postal Code*
Your postal code

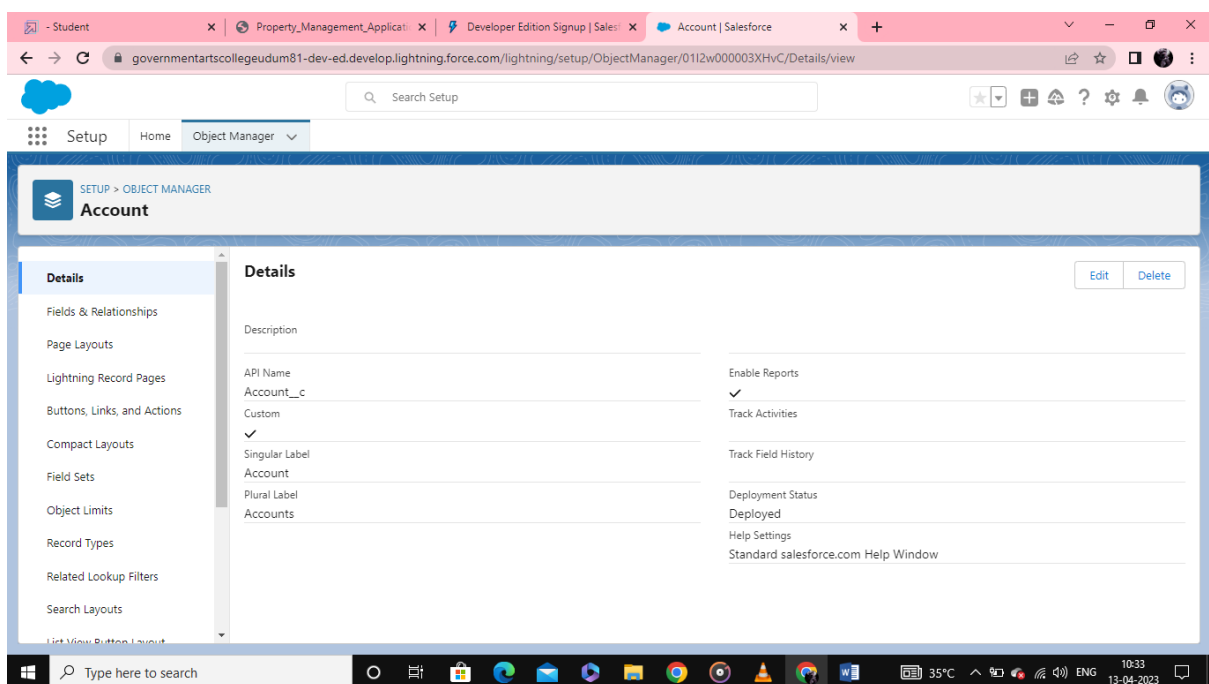
Username*
[jane@company.sandbox]
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations.

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the Privacy Statement.

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

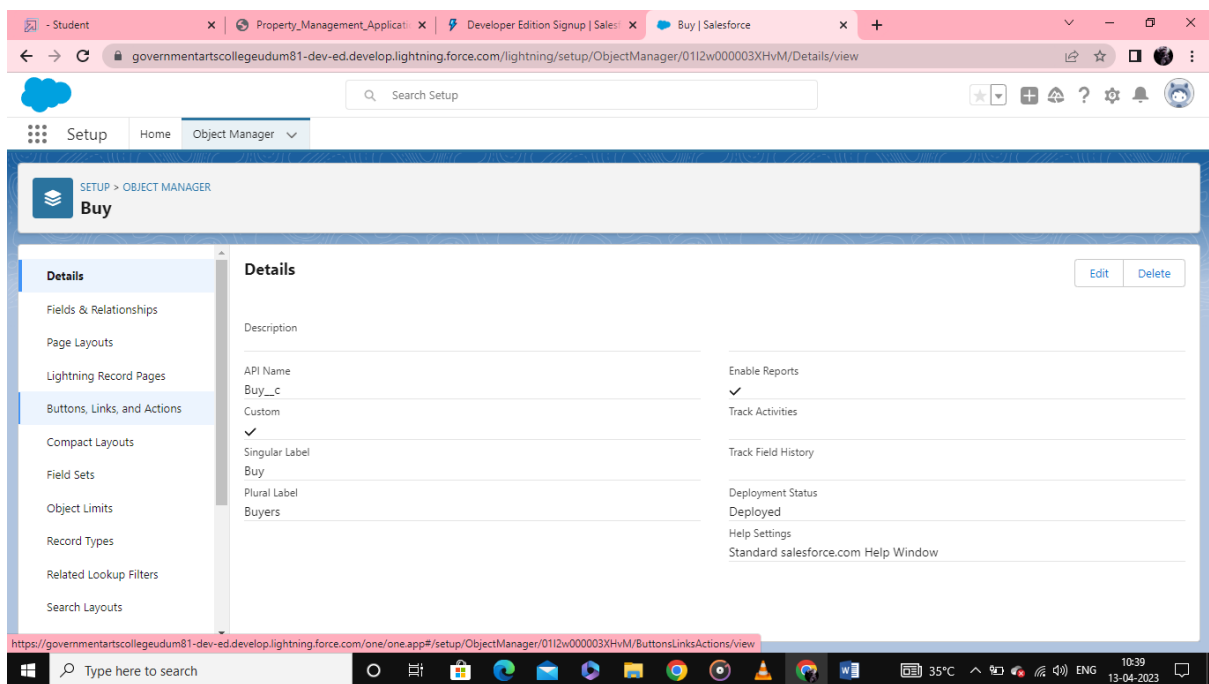
CREATION OF OBJECTS FOR PROPERTY MANAGEMENT:



1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

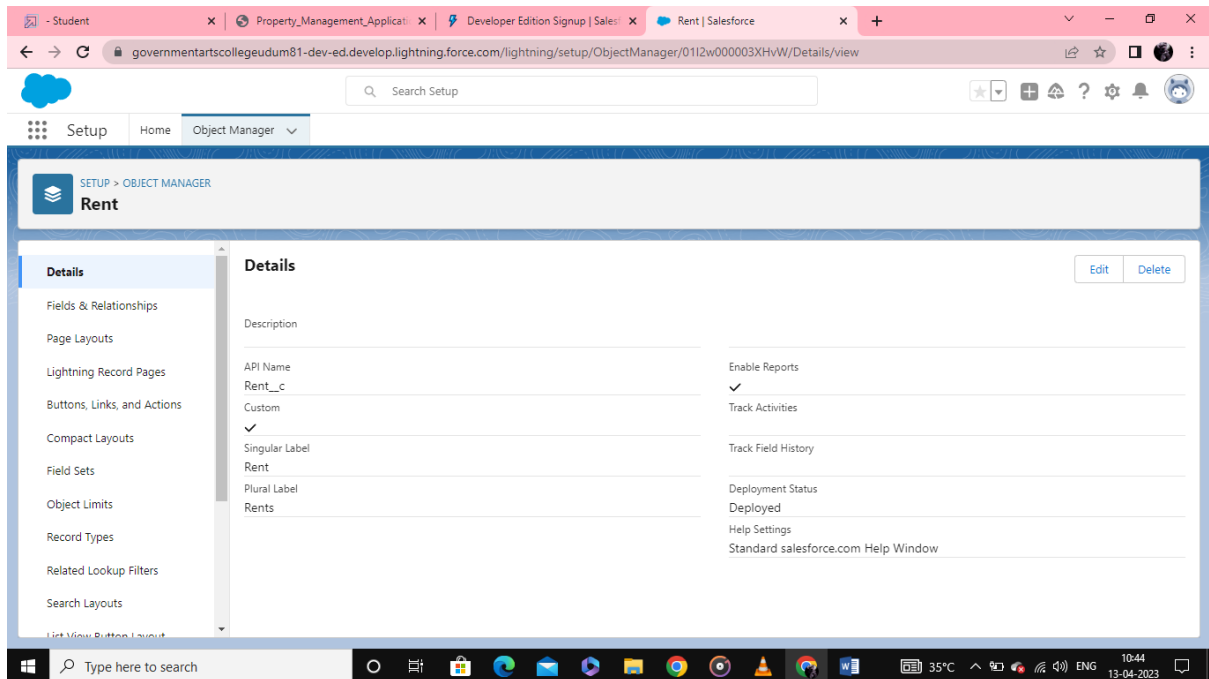
3. Enter the label name → Account
4. Plural label name → Accounts
5. Click on Allow reports,
6. Allow search → Save

CREATION OF BUY OBJECT:



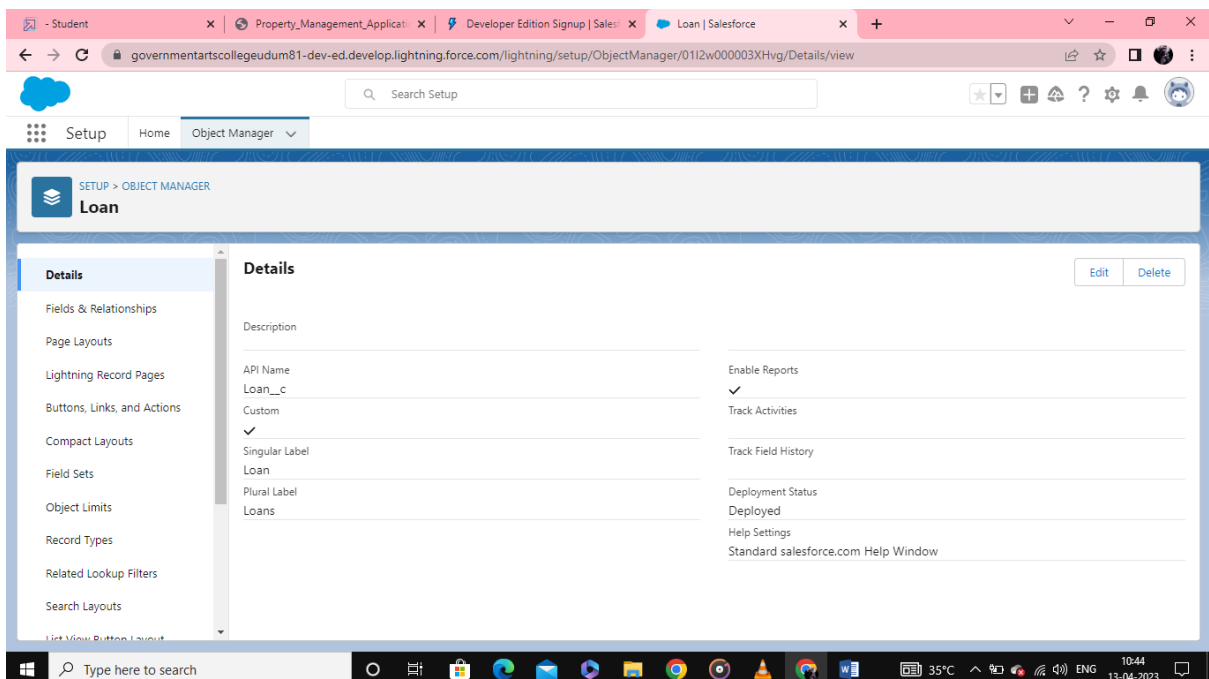
1. To create an object:
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name → Buy
4. Plural label name → Buyers
5. Click on Allow reports,
6. Allow search → Save

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

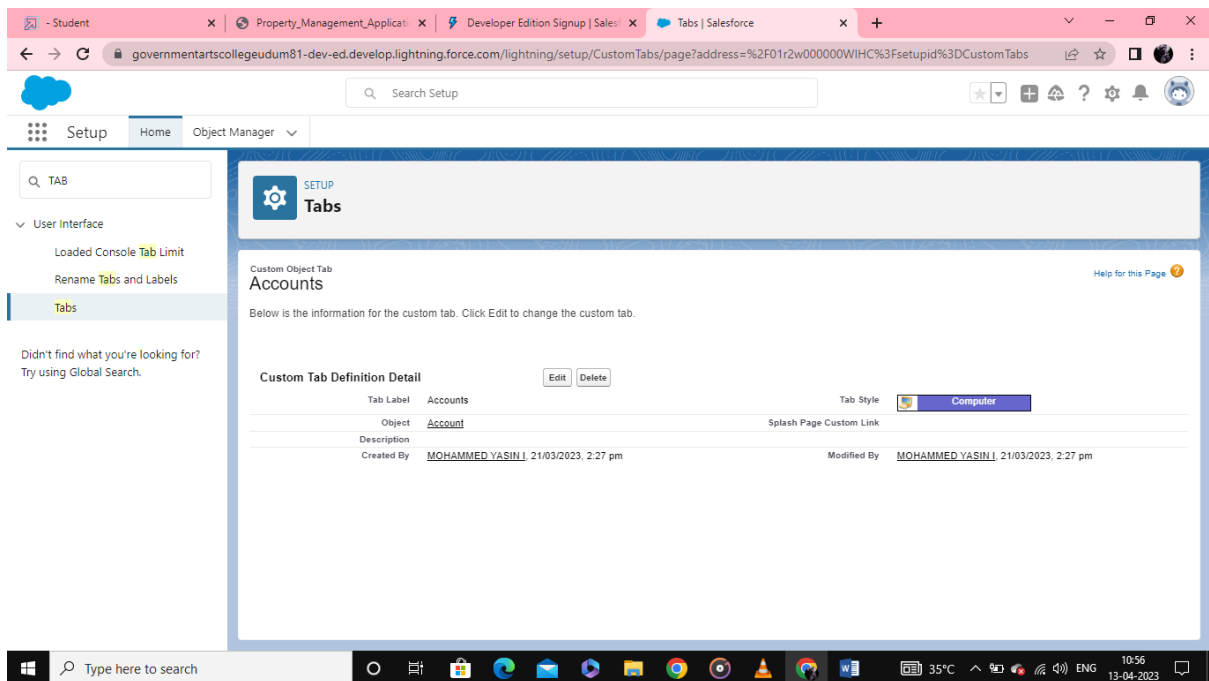
CREATION OF LOAN OBJECT:



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

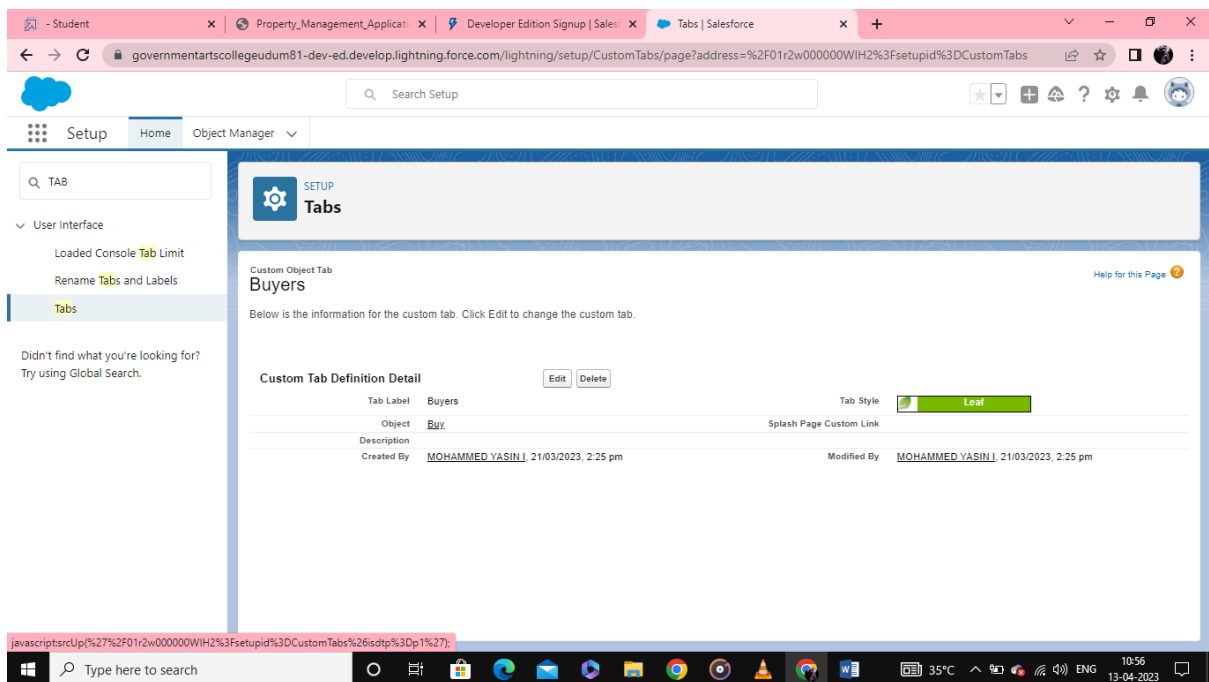
TABS:

Creation of Account Tab:



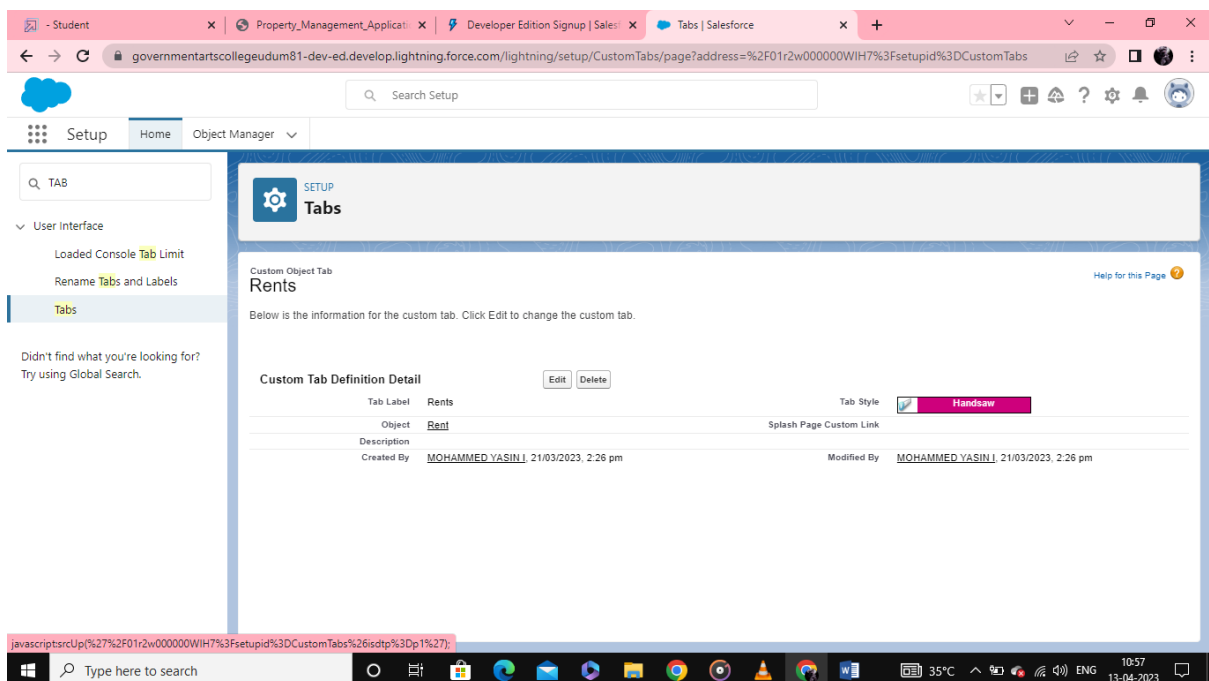
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object (Account) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.

CREATION OF BUY TAB:



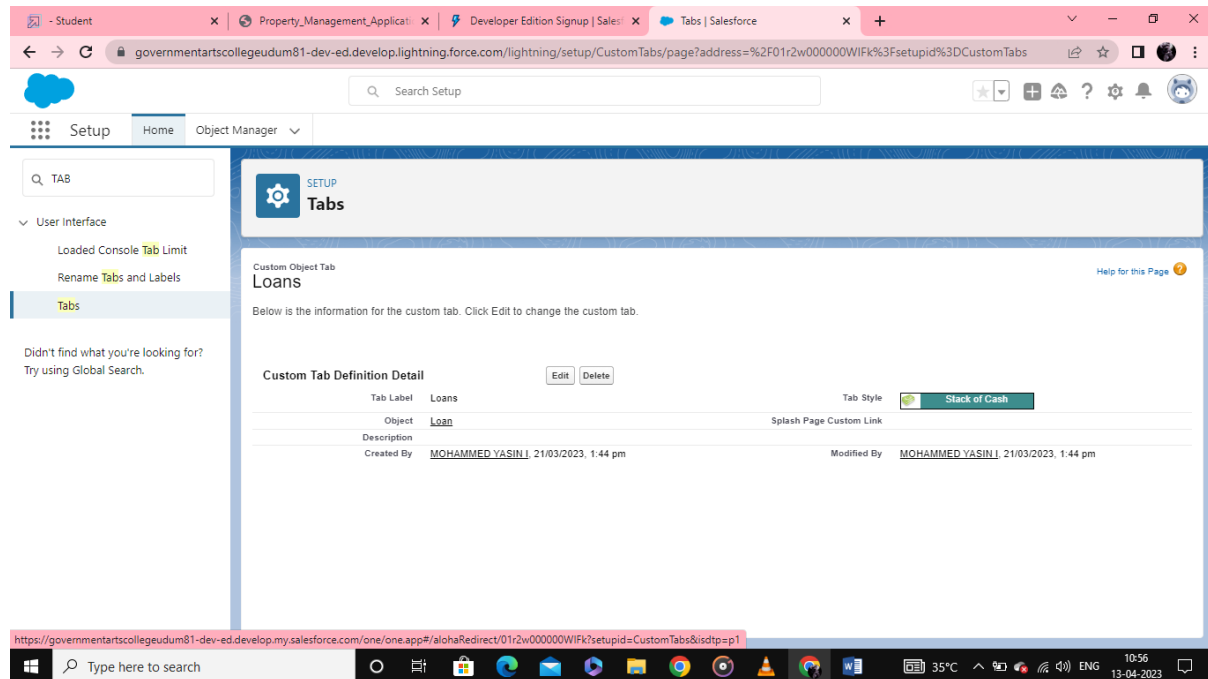
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object (Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.

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.

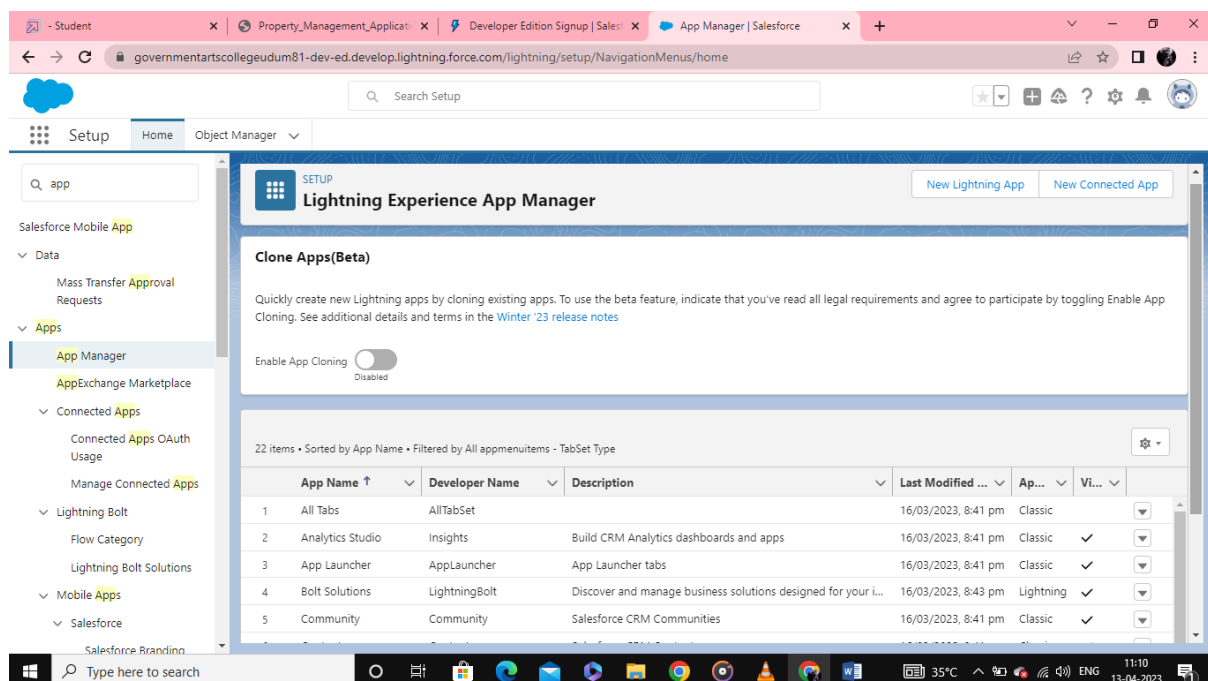
CREATION OF LOAN TAB:



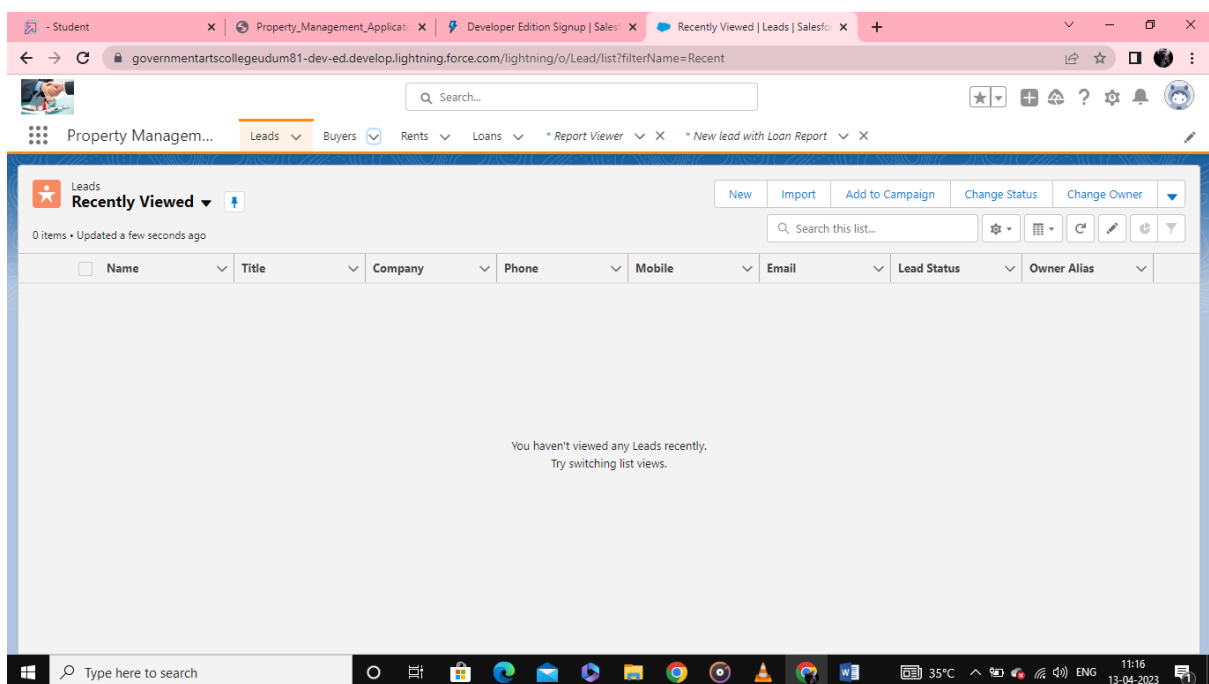
1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)
2. Select Object (Buy) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save

LIGHTNING APP:

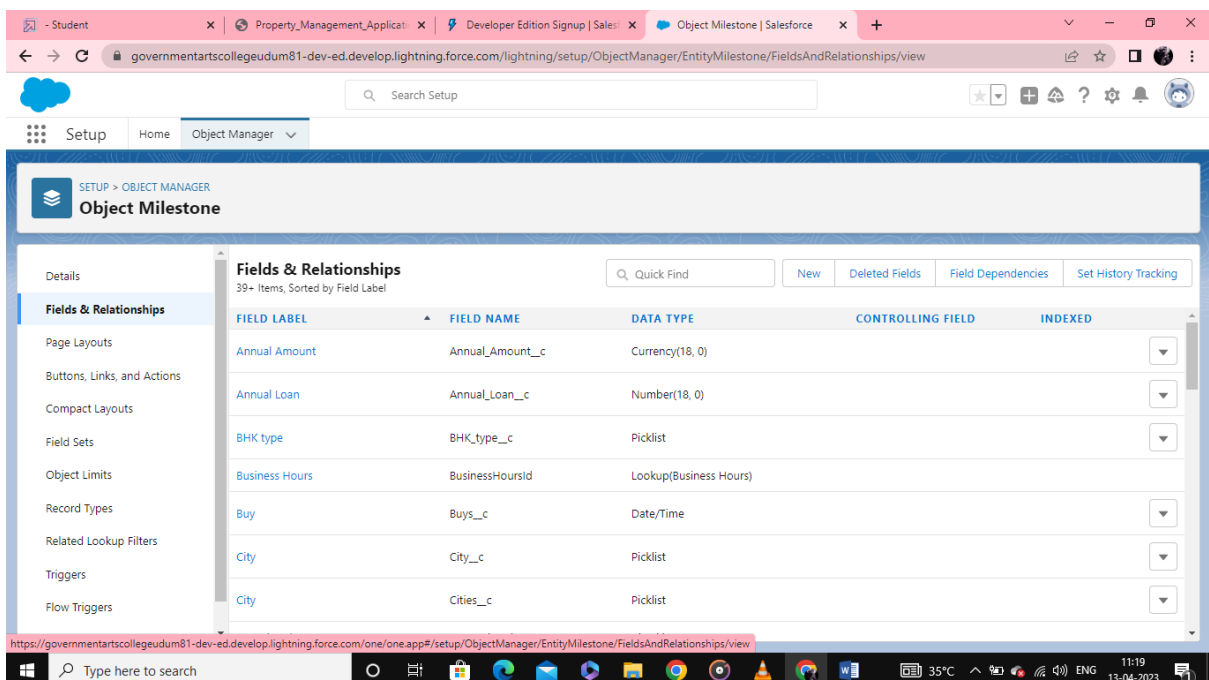
Creating the Lightning app:



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.

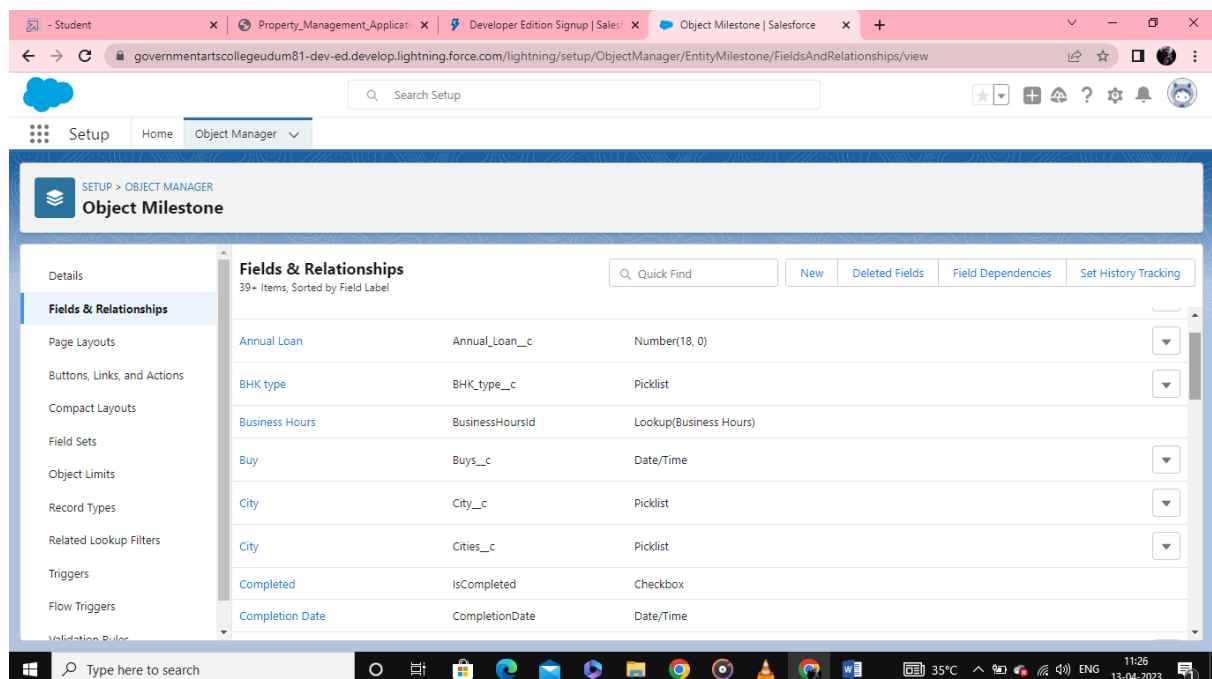


FIELDS:



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:



The screenshot shows the Salesforce Object Manager interface for the 'Object Milestone' object. The 'Fields & Relationships' tab is selected, displaying a list of 39+ items sorted by field label. The list includes fields like 'Annual Loan', 'BHK type', 'Business Hours', 'Buy', 'City', 'City', 'Completed', and 'Completion Date'. Each row shows the field label, the API name, and the data type. The 'Buy' field is highlighted in blue, indicating it is the current selection.

Field Label	API Name	Data Type
Annual Loan	Annual_Loan__c	Number(18, 0)
BHK type	BHK_type__c	Picklist
Business Hours	BusinessHoursId	Lookup(Business Hours)
Buy	Buy__c	Date/Time
City	City__c	Picklist
City	Cities__c	Picklist
Completed	IsCompleted	Checkbox
Completion Date	CompletionDate	Date/Time

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:

The screenshot shows the Salesforce Object Manager interface for the 'Object Milestone' object. The 'Fields & Relationships' section is active, displaying a table of fields. The search bar at the top right contains the text 'RENT'. The table has five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are 'Parent Object' (Lookup(Work Order,Incident)), 'Rent' (Auto Number), and 'Rental City' (Text(1)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Parent Object	ParentEntityId	Lookup(Work Order,Incident)		✓
Rent	Rent__c	Auto Number		
Rental City	Udumalpet__c	Text(1)		

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:

The screenshot shows the Salesforce Object Manager interface for the 'Object Milestone' object. The 'Fields & Relationships' section is active, displaying a table of fields. The search bar at the top right contains the text 'LOAN'. The table has five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are 'Annual Loan' (Number(18, 0)), 'Loan Amount' (Number(18, 0)), 'Loan Amount' (Formula (Currency)), 'Loan Id' (Auto Number), 'Loan Repayment' (Number(18, 0)), and 'Total Loan Instalments' (Number(18, 0)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Loan Amount	Loan_Amount__c	Number(18, 0)		
Loan Amount	Loan_Amounts__c	Formula (Currency)		
Loan Id	Loan_Id__c	Auto Number		
Loan Repayment	Loan_Repayment__c	Number(18, 0)		
Total Loan Instalments	Total_Loan_Instalments__c	Number(18, 0)		

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

$$(\text{Loan_Repayment_c} * (((1 + (\text{Interest_rate_c} / 52))^{\text{Term_c}} - 1)) / ((\text{Interest_rate_c} / 52) * ((1 + (\text{Interest_rate_c} / 52))^{\text{Term_c}})))$$
 ##Check the syntax below whether the formula syntax is correct or not.

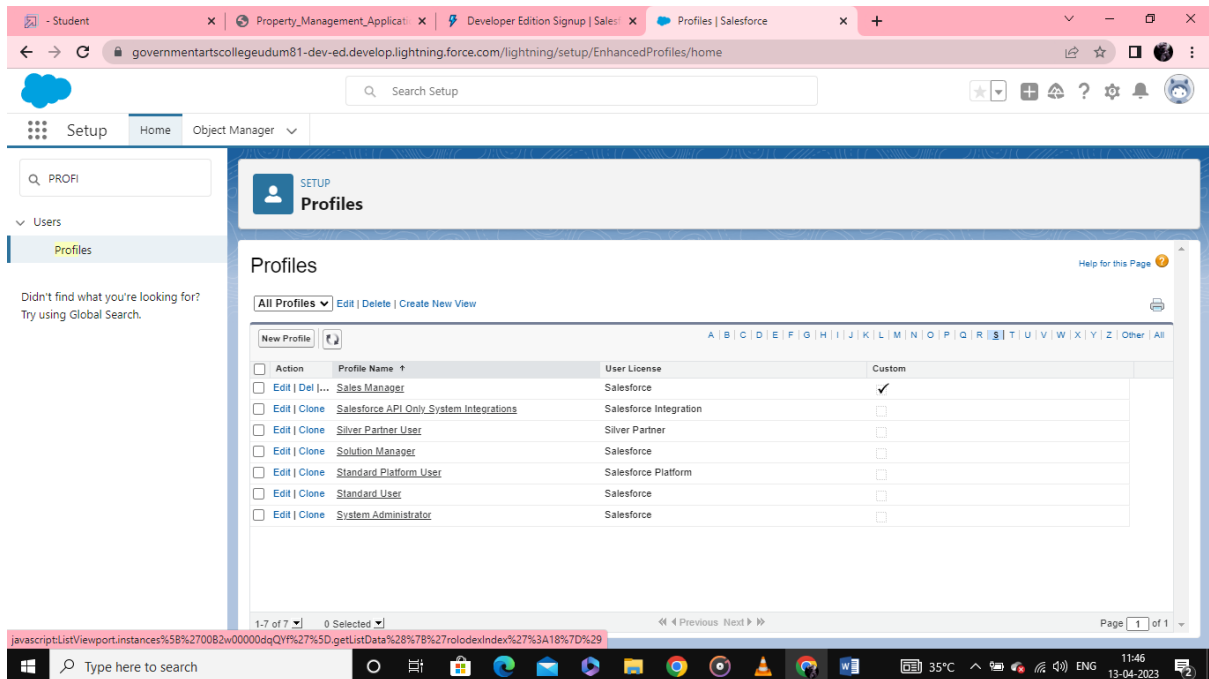
The screenshot shows the Salesforce Object Manager interface for the 'Loan Repayment' custom field. The browser address bar indicates the URL: `governmentartscollegeudm81-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/EntityMilestone/FieldsAndRelationships/00N2w00000XZcjl/view`. The page title is 'Object Milestone' and the breadcrumb is 'SETUP > OBJECT MANAGER > Object Milestone'. The left sidebar shows the 'Fields & Relationships' section selected. The main content area displays the 'Custom Field Definition Detail' for 'Loan Repayment'. The 'Field Information' section shows the following details:

Field Label	Loan Repayment	Object Name	Object Milestone
Field Name	Loan_Repayment	Data Type	Number
API Name	Loan_Repayment__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MOHAMMED YASIN I	Modified By	MOHAMMED YASIN I
	28/03/2023, 12:57 pm		28/03/2023, 12:57 pm

The 'General Options' section shows the following settings:

- Required: ☐
- Unique: ☐
- External ID: ☐

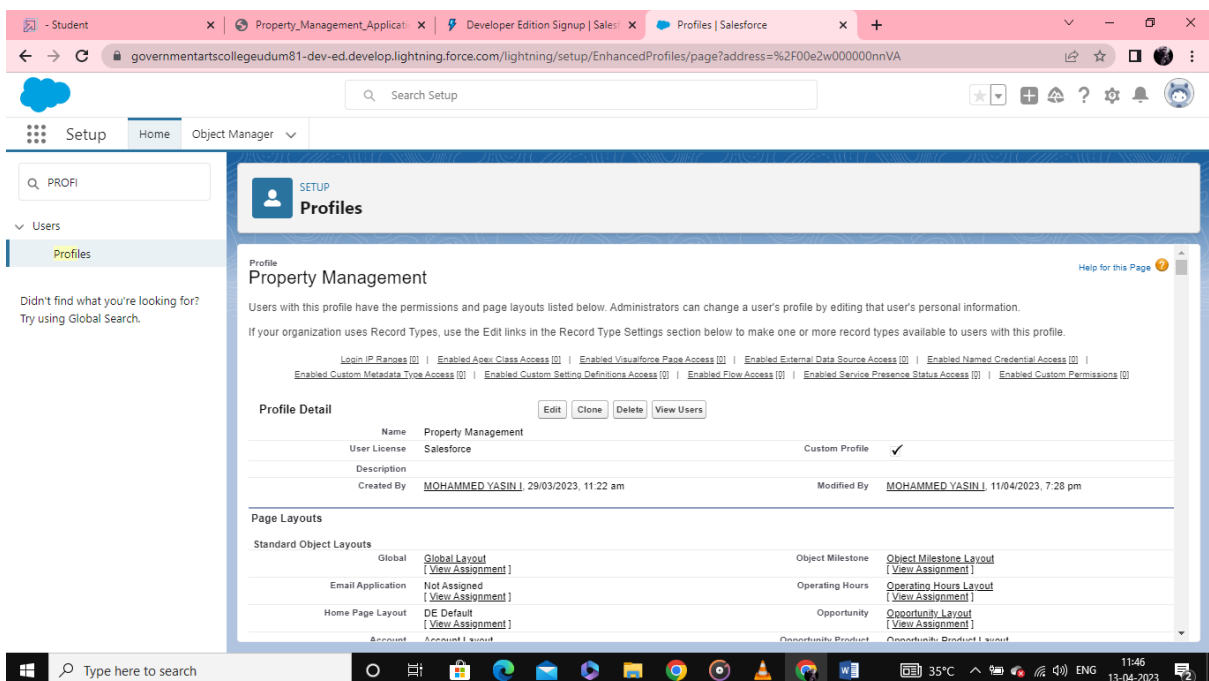
PROFILES:



The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar has a search bar with 'PROFI' entered and a 'Profiles' link under the 'Users' section. The main content area is titled 'Profiles' and shows a list of profiles. The 'Sales Manager' profile is selected, and its details are shown below the list.

Action	Profile Name	User License	Custom
Edit Delete	Sales Manager	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

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



The screenshot shows the Salesforce Setup interface for a specific profile named 'Property Management'. The page displays the profile details, including the name, user license, and custom profile status. It also shows a section for 'Page Layouts' with a table of layouts.

Page Layouts			
Standard Object Layouts			
Global	Global Layout (View Assignment)	Object Milestone	Object Milestone Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Operating Hours	Operating Hours Layout (View Assignment)
Home Page Layout	DE Default (View Assignment)	Opportunity	Opportunity Layout (View Assignment)
Account	Account Layout	Opportunity Product	Opportunity Product Layout

NEW USER:

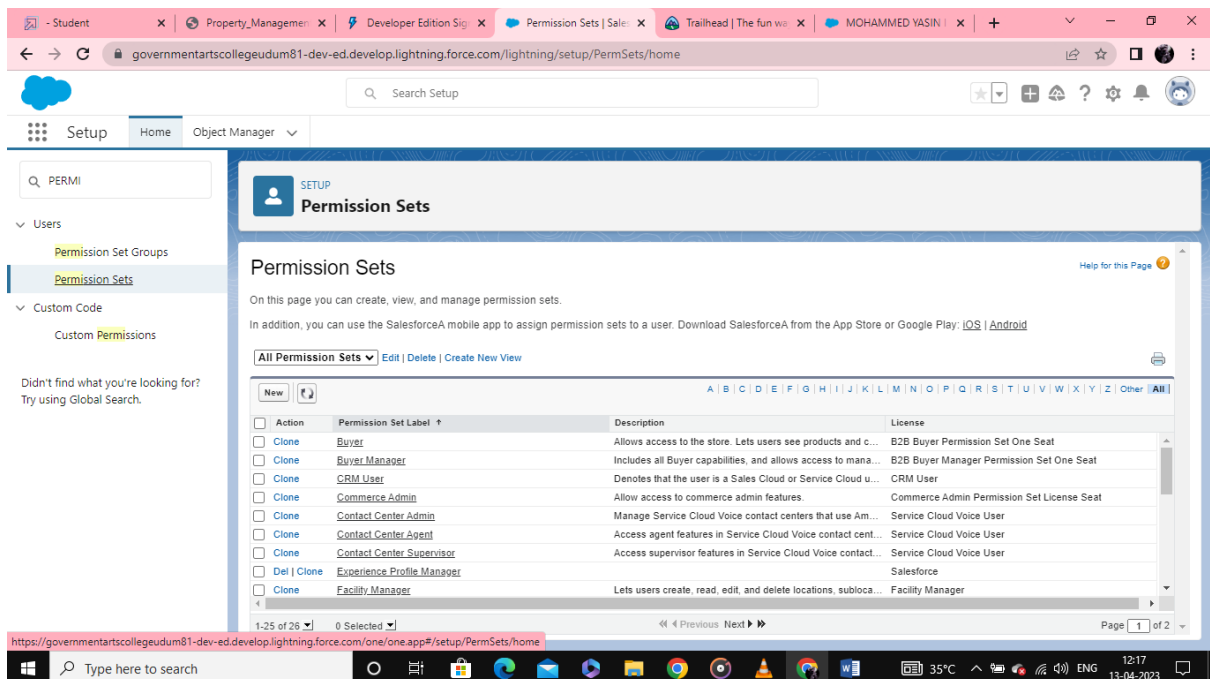
The screenshot shows the Salesforce Lightning Setup interface. The top navigation bar includes links for Setup, Home, and Object Manager. The left sidebar lists various setup categories, with 'Users' currently selected. The main content area is titled 'User' and shows the details for 'Mohammed Yasin I'. The details are organized into two columns. The left column contains fields like Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, and Locale. The right column contains fields for Role, User License, Profile, and checkboxes for various system permissions. The 'Standard Platform User' checkbox is checked. The bottom of the screen shows the Windows taskbar with various application icons and the system clock.

User Detail		Edit Sharing Reset Password Freeze
Name	Mohammed Yasin I	Role
Alias	mi	User License
Email	mohammed.yasin28032000@gmail.com	Profile
Username	mohammed.yasin28032000@gmail.com	Active
Nickname	User16800708091048254568	Marketing User
Title	Property Management	Offline User
Company	MKVB Customer service	Knowledge User
Department	Smartbridge	Flow User
Division	Naanmudhalvan	Service Cloud User
Address	UKC nagar Udumalpet 642126 TamilNadu India	Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User

PERMISSION SET:

CREATION THE PERMISSION SETS:

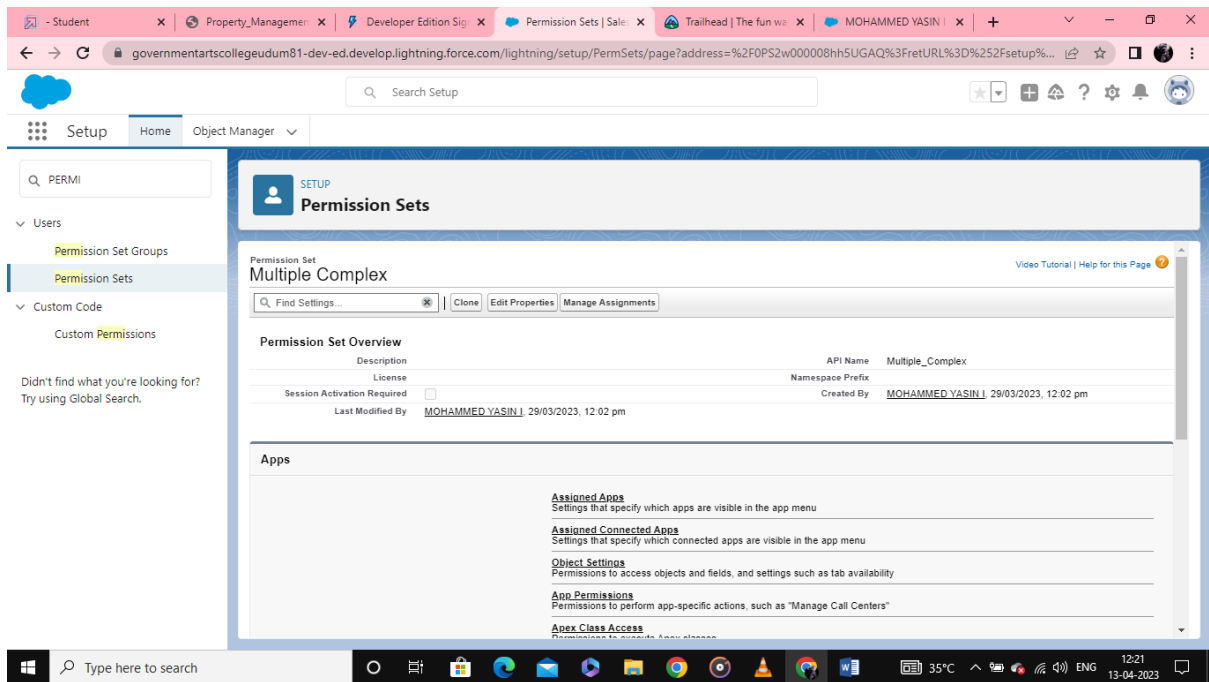
1. Go to setup → type “permission sets” in quick search → select permission sets → New



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

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

[Disable External Sharing Model](#)

Default Sharing Settings

[Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>

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

Sharing Settings

[Edit](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Streaming Channel	Private	Private	<input checked="" type="checkbox"/>
Web Cart Document	Public Read/Write	Private	<input checked="" type="checkbox"/>
Work Order	Private	Private	<input checked="" type="checkbox"/>
Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Account	Public Read/Write	Private	<input checked="" type="checkbox"/>
Buy	Public Read/Write	Private	<input checked="" type="checkbox"/>
Loan	Public Read/Write	Private	<input checked="" type="checkbox"/>
Rent	Private	Private	<input checked="" type="checkbox"/>

Other Settings

Standard Report Visibility ☒ [?](#) Manual User Record Sharing ☐ [?](#) Manager Groups ☐ [?](#) Secure guest user record access ☐ [?](#) Require permission to view record names in lookup fields ☐ [?](#)

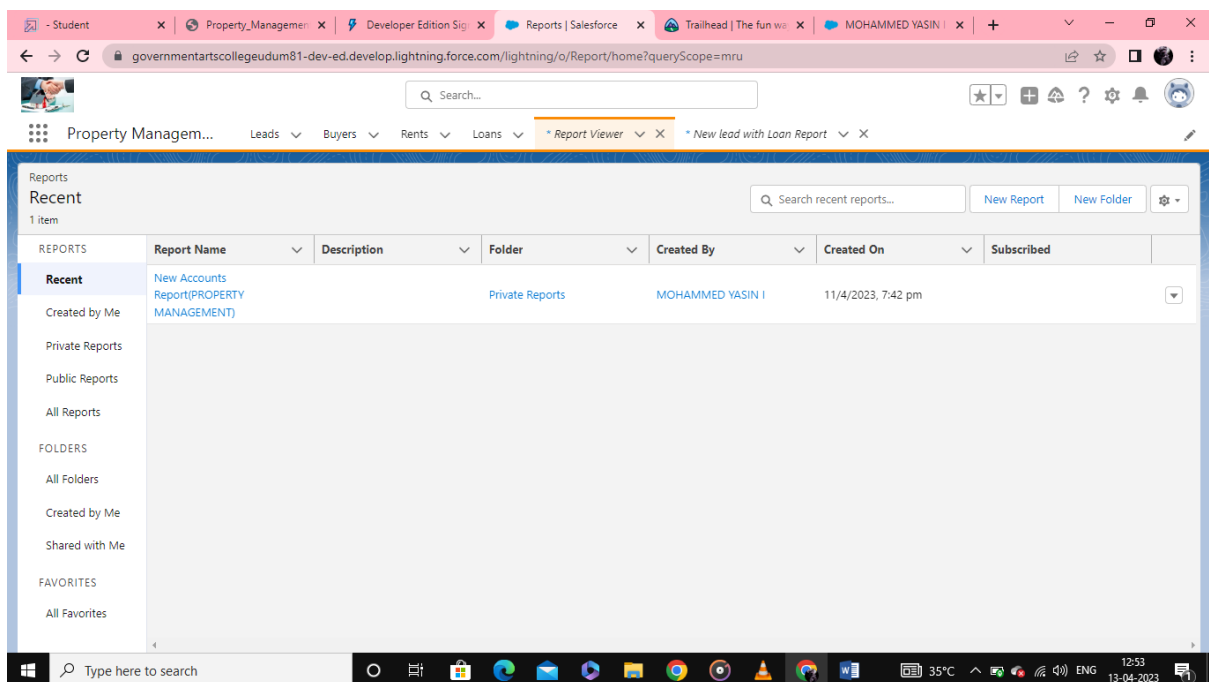
[Save](#) [Cancel](#)

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.

Report: Accounts
New Accounts Report(PROPERTY MANAGEMENT)

Total Records: 13

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	MOHAMMED YASIN I	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	16/03/2023
2	-	MOHAMMED YASIN I	Dickenson plc	KS	Customer - Channel	-	16/03/2023
3	-	MOHAMMED YASIN I	Edge Communications	TX	Customer - Direct	Hot	16/03/2023
4	-	MOHAMMED YASIN I	Express Logistics and Transport	OR	Customer - Channel	Cold	16/03/2023
5	-	MOHAMMED YASIN I	GenePoint	CA	Customer - Channel	Cold	16/03/2023
6	-	MOHAMMED YASIN I	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	16/03/2023
7	-	MOHAMMED YASIN I	Pyramid Construction Inc.	-	Customer - Channel	-	16/03/2023
8	-	Automated Process	Sample Account for Entitlements	-	-	-	16/03/2023
9	-	MOHAMMED YASIN I	sForce	CA	-	-	16/03/2023
10	-	MOHAMMED YASIN I	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	16/03/2023
11	-	MOHAMMED YASIN I	United Oil & Gas, UK	UK	Customer - Direct	-	16/03/2023
12	-	MOHAMMED YASIN I	United Oil & Gas Corp.	NY	Customer - Direct	Hot	16/03/2023
13	-	MOHAMMED YASIN I	University of Arizona	AZ	Customer - Direct	Warm	16/03/2023

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

DASHBOARDS:

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

Dashboards

Recent

2 items

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Property Management		Private Dashboards	MOHAMMED YASIN I	11/4/2023, 8:02 pm	
Created by Me	New lead with Loan Report		Private Dashboards	MOHAMMED YASIN I	11/4/2023, 7:59 pm	

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

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

The screenshot shows a Salesforce Lightning interface. The top navigation bar includes tabs for 'Property Management', 'Leads', 'Buyers', 'Rents', 'Loans', and 'New Accounts Report(PRO...)'. The main dashboard area displays a 'New Accounts Report(PROPERTY MANAGEMENT)' table. The table has columns for 'Last Modified By', 'Account ID', 'Account Name', 'Billing State', and 'Type'. The data rows show accounts created by 'MOHAMMED YASIN I' with names like 'GenePoint', 'United Oil & Gas, UK', 'United Oil & Gas, Singapore', and 'Edge Communications'. A 'View Report' link is visible below the table. The bottom of the screen shows a Windows taskbar with various application icons and system information like '35°C' and '13:05 13-04-2023'.

Last...	Account ...	Account Name	Billing St...	Type
- MOHAMMED YASIN I		GenePoint	CA	Customer
- MOHAMMED YASIN I		United Oil & Gas, UK	UK	Customer
- MOHAMMED YASIN I		United Oil & Gas, Singapore	Singapore	Customer
- MOHAMMED YASIN I		Edge Communications	TX	Customer

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?"