

# **PROPERTY MANAGEMENT APPLICATION USING SALESFORCE**

**PROJECT BASED EXPERIMENTAL LEARNING PROGRAM**

**Mini Project On**  
**Property Management Application using Salesforces**  
**Bachelor of Science**  
**In**  
**Physics**

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## *SYNOPSIS*

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### **INTRODUCTION**

### **NEEDS**

### **FEATURES OF PROPERTY MANAGEMENT**

### **LOCATION AND BRAINSTORMING**

### **RESULT**

### **ADVANTAGES & DISADVANTAGES**

### **APPLICATIONS**

### **FUTURE SCOPE**

### **CONCLUSION**

## **INTRODUCTION**

A PMS property management software belongs to a family of real estate software solutions that operators locally to optimize business processes for enhanced performance and transparency on a device or server side it's really the adviser\_de\_camp of land owners property manager and companies trying to simplify takes the would require a huge amount of time and money.

These types of software solutions are not only intended for one specific category of specialists in the industry PMS can help your company to achieve a greater degree of accuracy and success even if you own rental property commercial property and have real estate investment.

### **NEEDS:**

Real estate investment firms and companies:

Property management software does not only help land owners it could also support real estate investment companies with substantial values REITS and private equity companies can also use this enterprise solution

### **Commerical:**

Managers requires software solutions that give them the capabilities enhance their approach improve analysis and optimize the performance of their portfolios.

### **Retail:**

Building owners and managers of retail real estate businesses require unique enterprise solutions to improve their strategic thinking and performance analysis.

### **Tenants:**

While making maintenance requests getting alerts about building changes or incoming deliveries and connecting with managers tenants could use PMS property management software though the use of a tenant portal.

### **Property owners and managers:**

To maximize their duties and operations property owners of every from of rental can use property management software all these properties can benefit from this real estate software.

### **FEATURES OF PROPERTY MANAGEMENT:**

#### **Accounting:**

A financial module which will help you to deal with mortgages transactions banking information debts and plenty more can be incorporated with your property management software centralizes all the activities to one location stored safely and accessible with just few taps.

#### **Communicating:**

You can contact tenants directly through text messages and by email using a designed in communication feature and functionality in your real estate software solution you can even send messages separately or even in bulk build groups and save the chat history inside the application.

#### **Online payments:**

Integration of payments will help you mitigate the hours spent on billing and bring down the cost incurred on paper records and collect funds safely.

#### **Maintenance management:**

Property management software solutions enable support and maintenance requests to be handled service provides and suppliers to be scheduled and tenants and property owners to communicate about scheduled maintenance tasks with great ease.

#### **Space management:**

The space management feature and the functionality role in real estate software solutions simplify the allocation of resources tracks and reports on the usage space and materials and allows physical properties to be properly controlled.

#### **Document management:**

All the data about your property land tenants and finances can be saved by your property management software you can upload import and handle documents such as flow statement or lease rolls using personalized solution.

## IDEATION AND BRAINSTORMING

### EMPATHY MAP

**Conducting a brainstorm**

For every idea you have, write it down. Building on each other's ideas is the key to a successful brainstorm. Don't worry about whether an idea is good or bad. Just write it down. The more ideas, the better. Don't worry about whether an idea is good or bad. Just write it down. The more ideas, the better.

1. Write down your ideas.  
2. Build on each other's ideas.  
3. Write down your ideas.

**Before you collaborate**

1. Set up your workspace. Make sure everyone has a pen and paper.  
2. Explain the rules of the game. Everyone gets one idea. No stealing ideas.  
3. Start the game. Go around the room and give everyone one idea.

**Choose your best 'How Might We?' Questions**

1. How might we...  
2. How might we...  
3. How might we...

**Brainstorm solo**

1. Write down your ideas.  
2. Build on each other's ideas.  
3. Write down your ideas.

**Brainstorm as a group**

1. Write down your ideas.  
2. Build on each other's ideas.  
3. Write down your ideas.

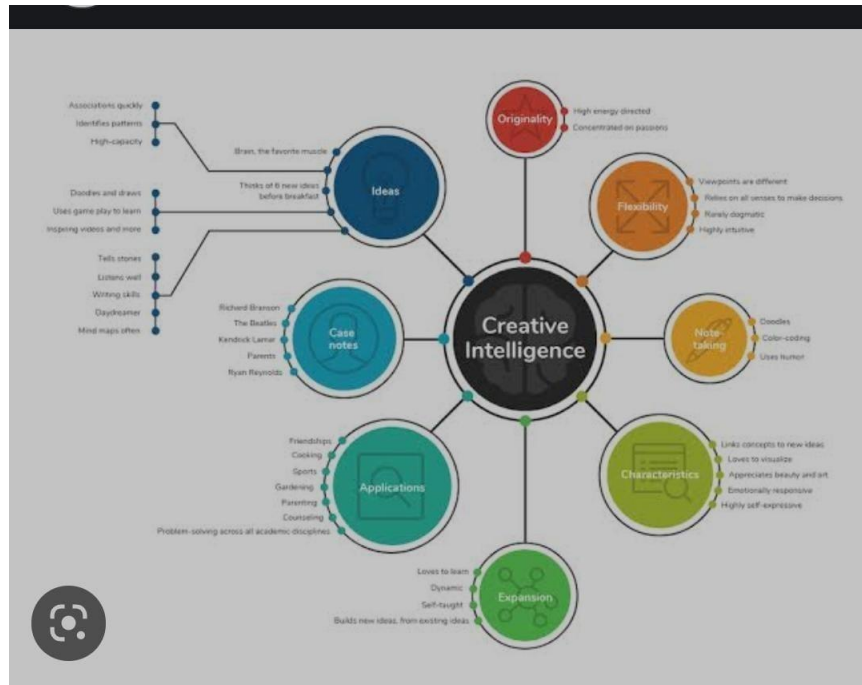
**Decide your focus**

1. Write down your ideas.  
2. Build on each other's ideas.  
3. Write down your ideas.

**After you collaborate**

1. Set up your workspace. Make sure everyone has a pen and paper.  
2. Explain the rules of the game. Everyone gets one idea. No stealing ideas.  
3. Start the game. Go around the room and give everyone one idea.

## BRAINSTORMING



## Property Management Application using Salesforce

### Project Description:-

## Milestone 1-Salesforce

### Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce!

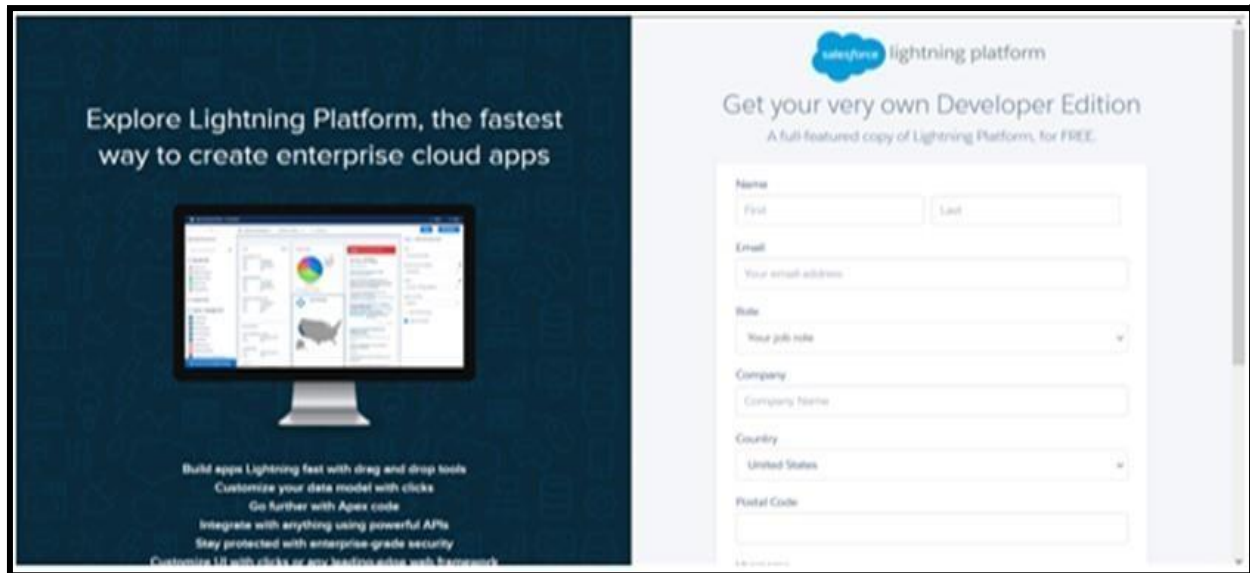
Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?" **What Is Salesforce?**

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

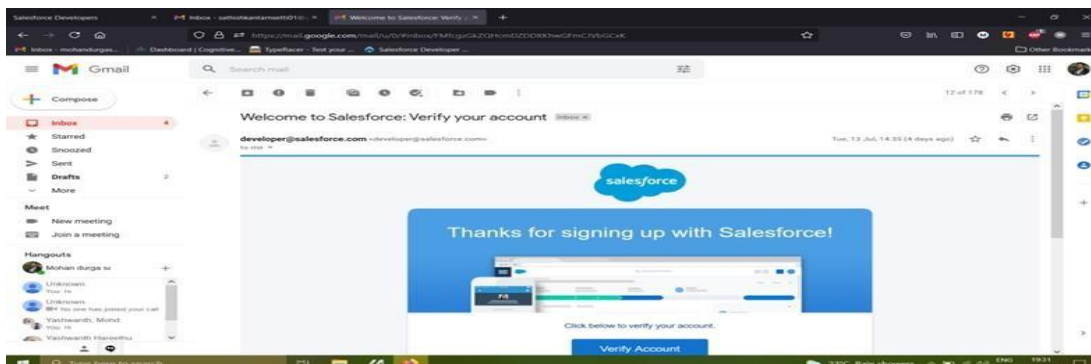


t

## Activity 2-

### Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



# Milestone 2-

Salesforce objects are of two types:

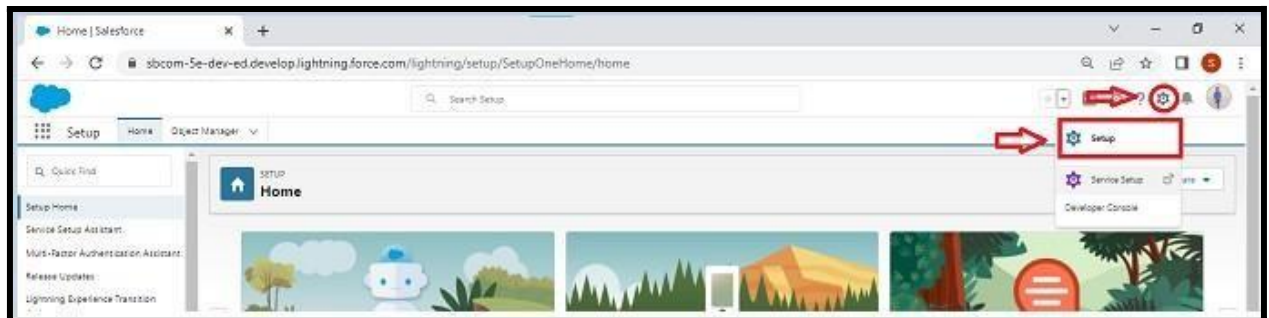
- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential their organization. They are the heart of any application and provide a structure for sharing data.

Activity1:

## Object

To Navigate to Setup page :

1. Click on gear icon → click setup.



To create an object:

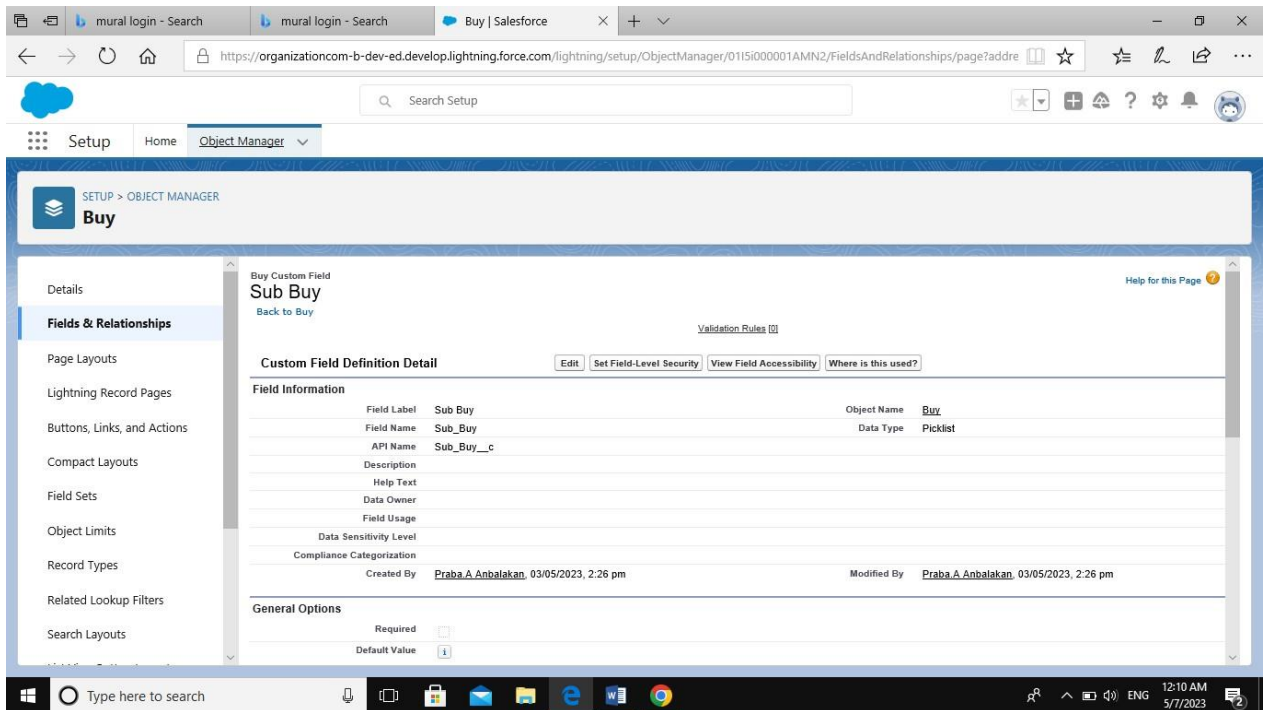
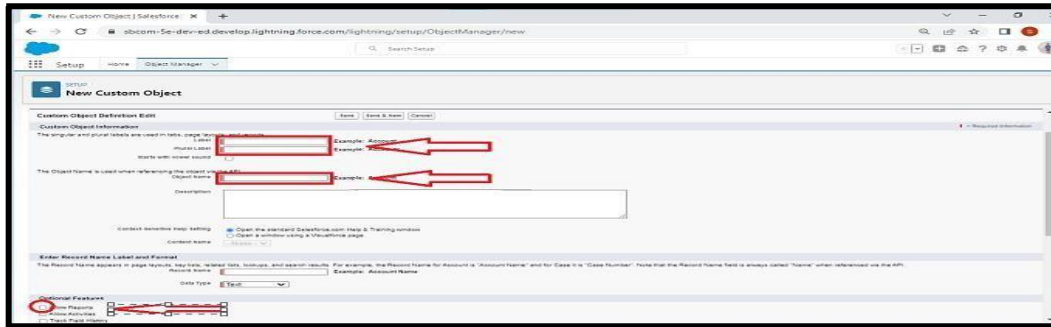
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search → **Save**





t.

### Activity3:

#### Create Object Loan

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,
- 12.Allow search → **Save**

## Milestone 3:Tab

### What is Tab?

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

### Types of Tab

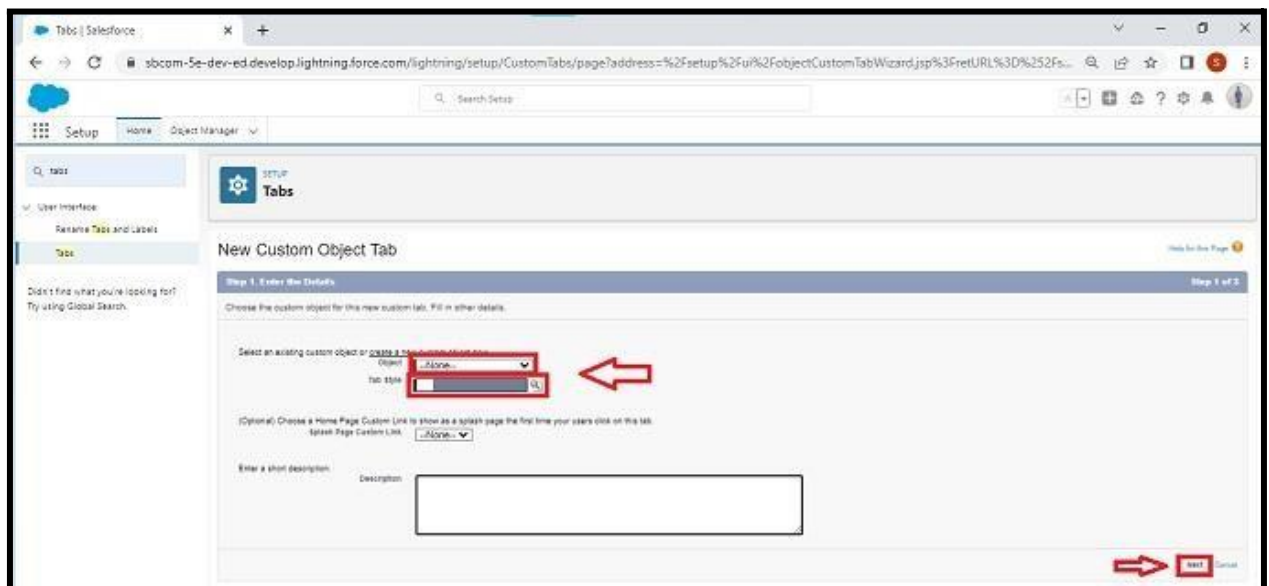
- Custom object tab
- Web tab
- Visualforce

- Activity 1:

### Create the Lightning Tab

#### To create a Tab:(Lead)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)



## Activity 2:

To create a Tab:(Buy)

## Activity 3:

To create a Tab:(

## Activity4:

To create a Tab:(

# Milestone 4- The Lightning App:

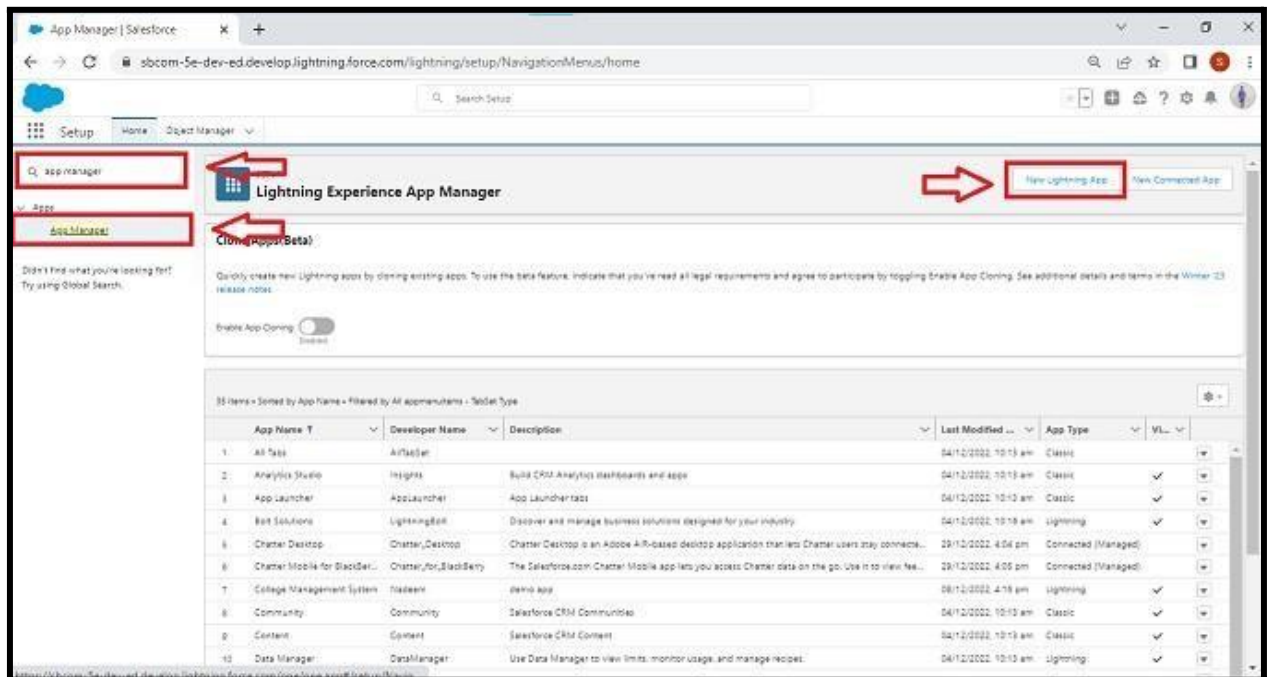
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

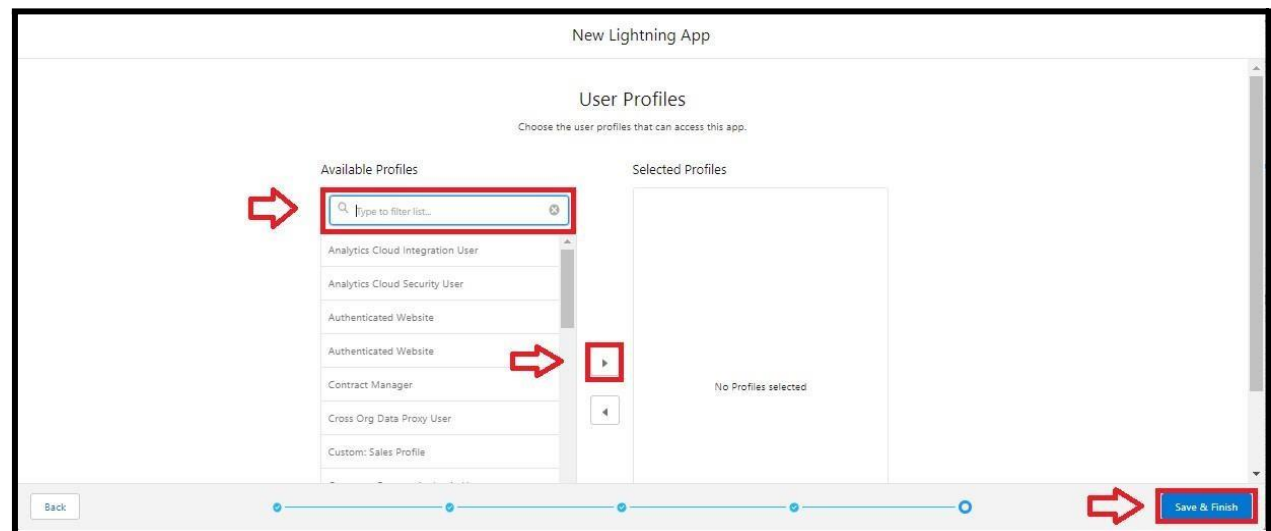
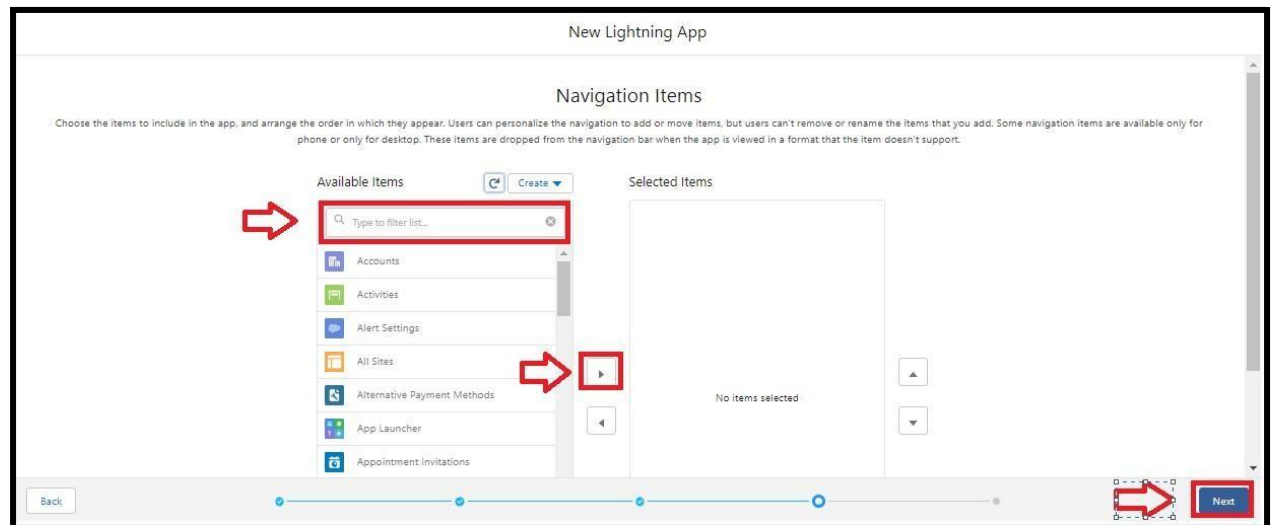
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

## Activity1

### Create the Lightning App

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





## Milestone5-

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

### Types of Fields

- Standard Fields
- Custom Fields

### Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every

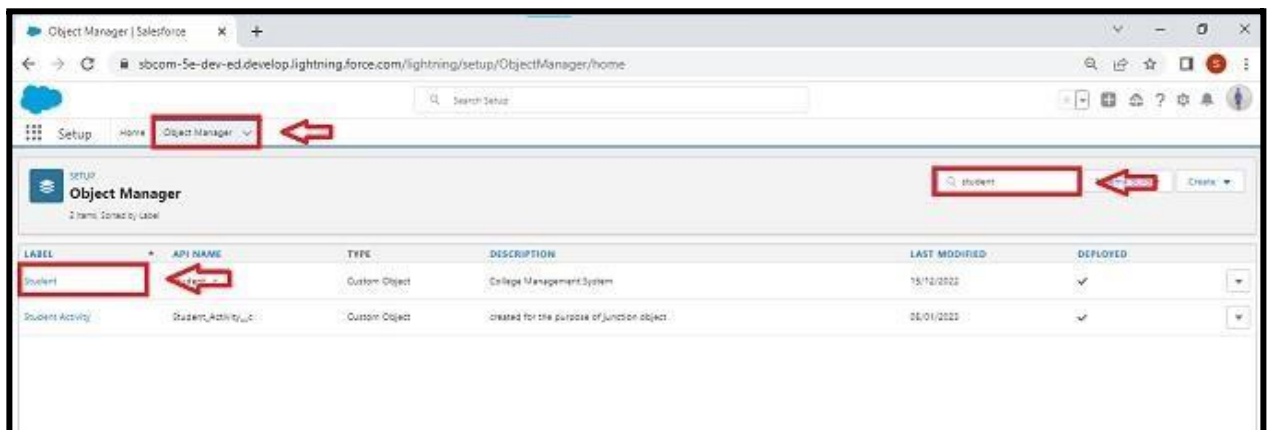
Salesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

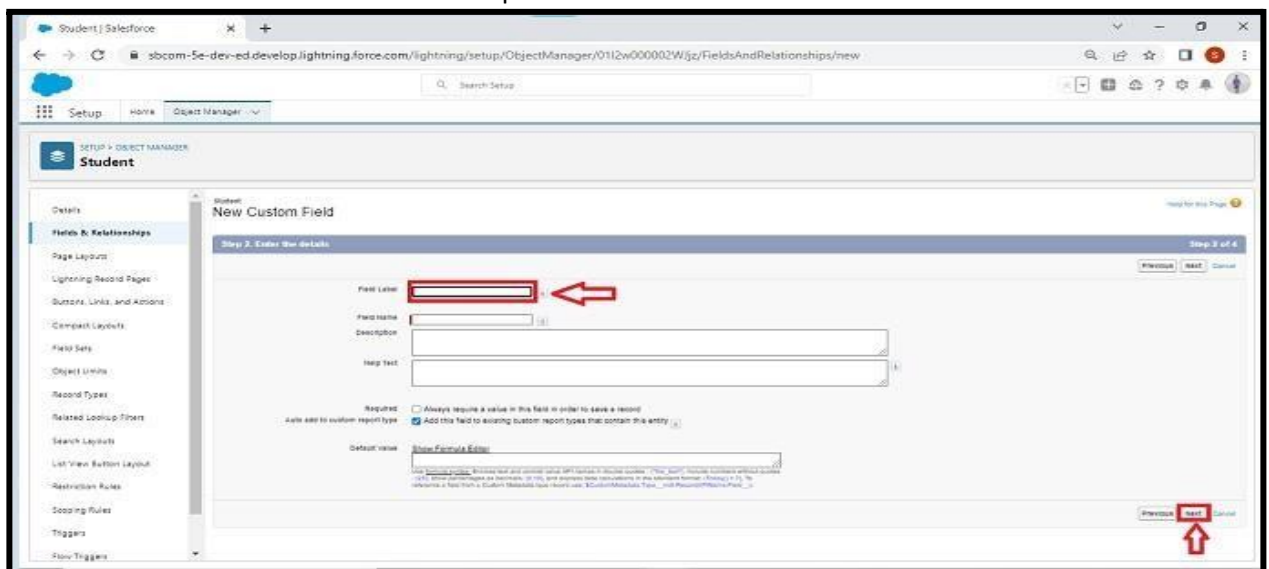
### Custom Fields:

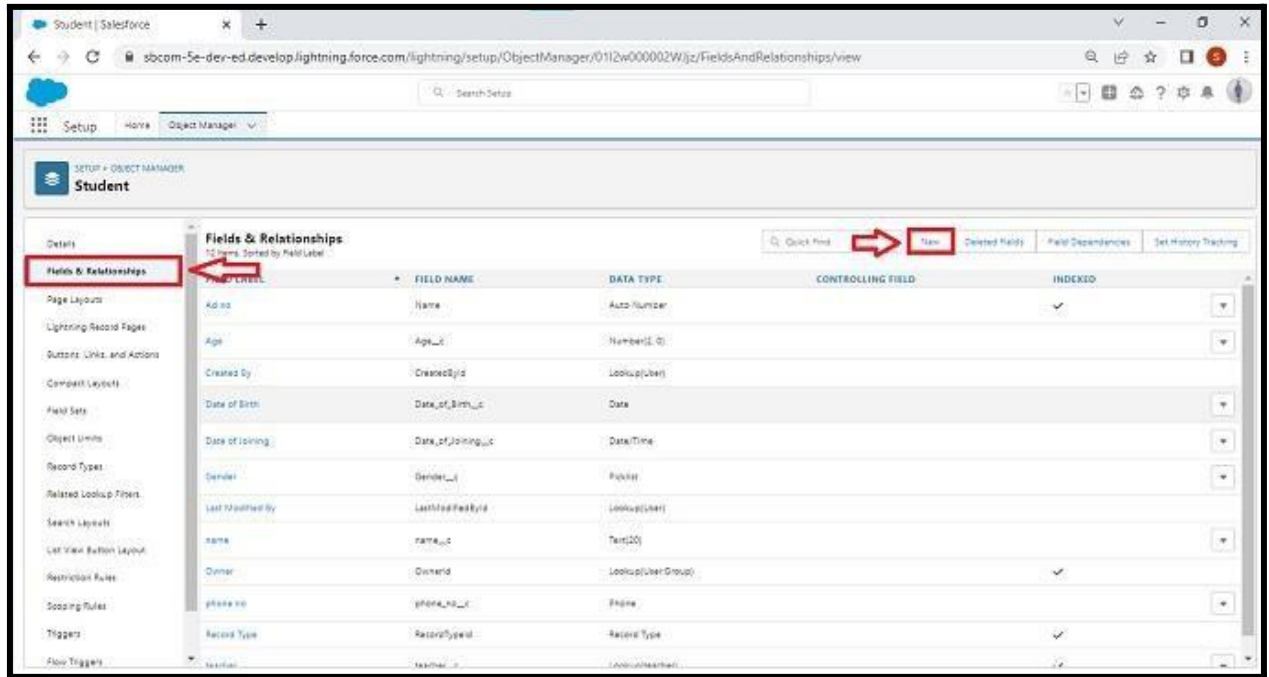
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

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.

### Create the remaining Fields:

Follow the Above Steps to create the Field just change the Labels for Below Fields

**Lead:** (AutoNumber Created Field while creating Object) → L-{0000}

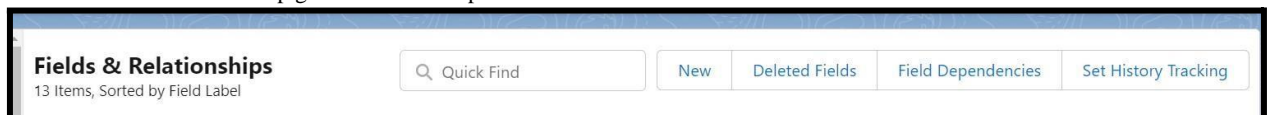
**State:** Create the Picklist Field (Maharashtra, Gujarat, Rajasthan) (Field Dependency)

**City:** Create the Picklist (Mumbai, Pune, Nashik) (Field Dependency)

**Email:** Create the Email Select the Data Type As Email (Email)

**Phone:** Select the Field Data type as (Phone)

In the Fields and Relationship go to the Field Dependencies



Click button to include or exclude selected values from the dependent picklist:

[Include Values](#) [Exclude Values](#)

Showing Columns: 1 - 4 (of 4) < Previous   Next > <a href="#">View All</a> <a href="#">Go to</a>				
State:	Maharashtra	Telangana	Gujrat	Tamil Nadu
City:	Mumbai	Mumbai	Mumbai	Mumbai
	Pune	Pune	Pune	Pune
	Nasik	Nasik	Nasik	Nasik
	Hyderabad	Hyderabad	Hyderabad	Hyderabad
	Surat	Surat	Surat	Surat
	Ahemdabad	Ahemdabad	Ahemdabad	Ahemdabad

Showing Columns: 1 - 4 (of 4) < Previous | Next > [View All](#)

Click button to include or exclude selected values from the dependent picklist:

[Include Values](#) [Exclude Values](#)

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

## Activity2: For Object Bu

1. City:(Take Any City for Field Dependency)
2. Annual Amount To Be Paid Activity3:

## Create Field for Rent

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) Activity4:

## Create Field for Loan

[New Profile](#) 

<input type="checkbox"/>	Action	Profile Name ↑	User License
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Silver Partner User</a>	Silver Partner
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Solution Manager</a>	Salesforce
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Standard Platform User</a>	Salesforce Platform
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Standard User</a>	Salesforce
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">System Administrator</a>	Salesforce

1. For the Loan Object→ Go to the fields and Relationship and select the formula in field data type. In Formula option sele
2. \\ct Advanced Formula and write the following formula  

$$(\text{Loan\_Repayment\_c} * (((1 + (\text{Interest\_rate\_c} / 52))^{\text{Term\_c}}) - 1)) / (($$

##Check the syntax below whether the formula syntax is correct or not

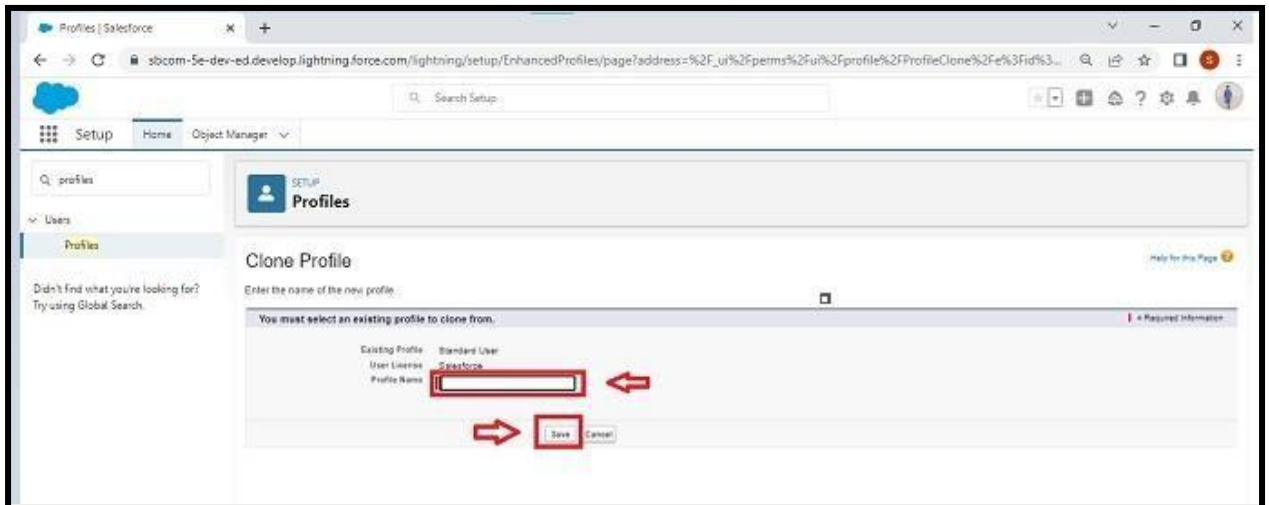
## Milestone 6: Profile

- By default salesforce provide below standard profiles.
- We cannot deleted standard ones
- .Each of these standard one includes a default set of permissions for all of the standard objects available on the platform.

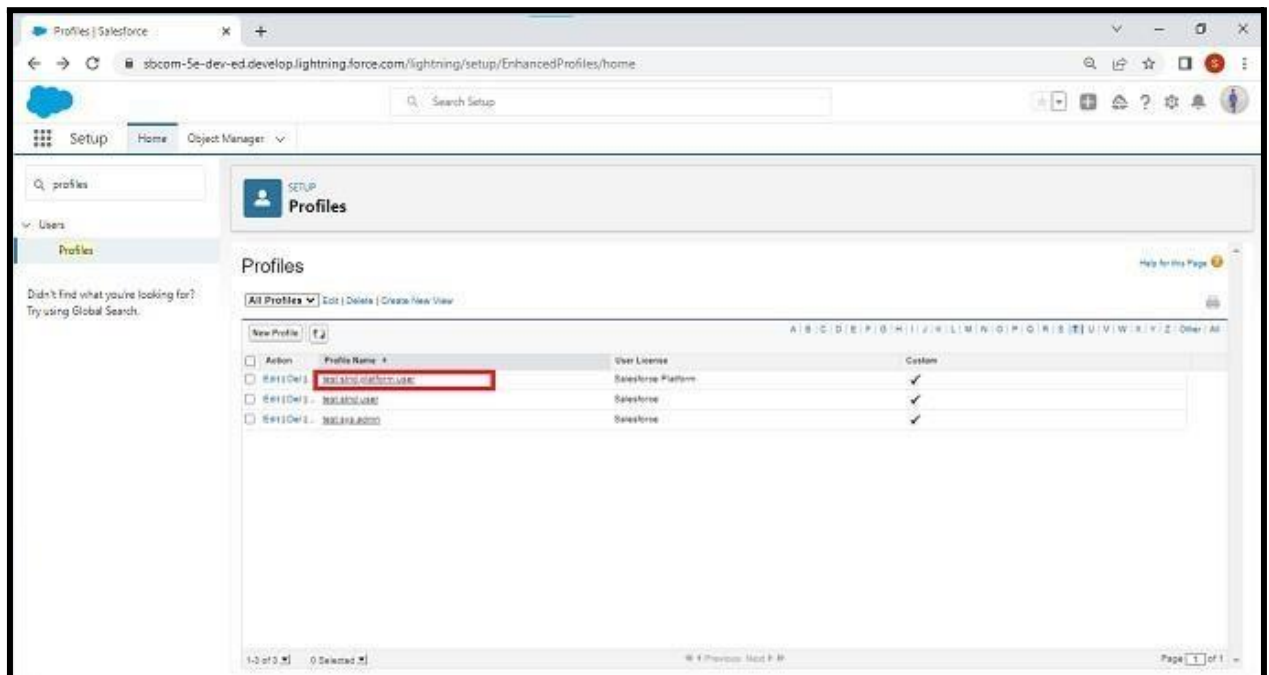
The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Profiles' link is highlighted with a red box. The main content area displays a table of profiles. The 'Standard' profile is highlighted with a red box, and its 'Customize' checkbox is checked. The table lists various profiles including 'Standard', 'Standard Mobile App', 'Standard Mobile App User', 'Standard Mobile App User', 'Standard Mobile App User', and 'Standard Mobile App User'.

- ## 1. .Enter a Profile Name

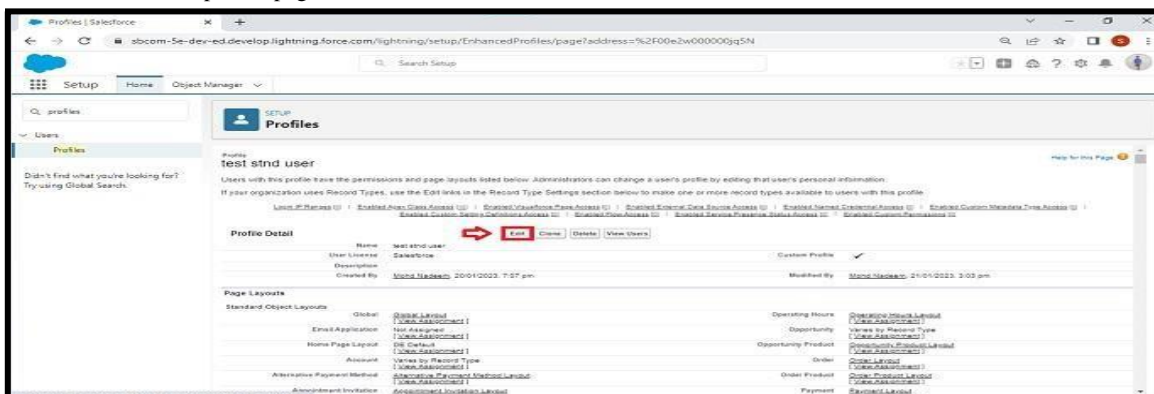


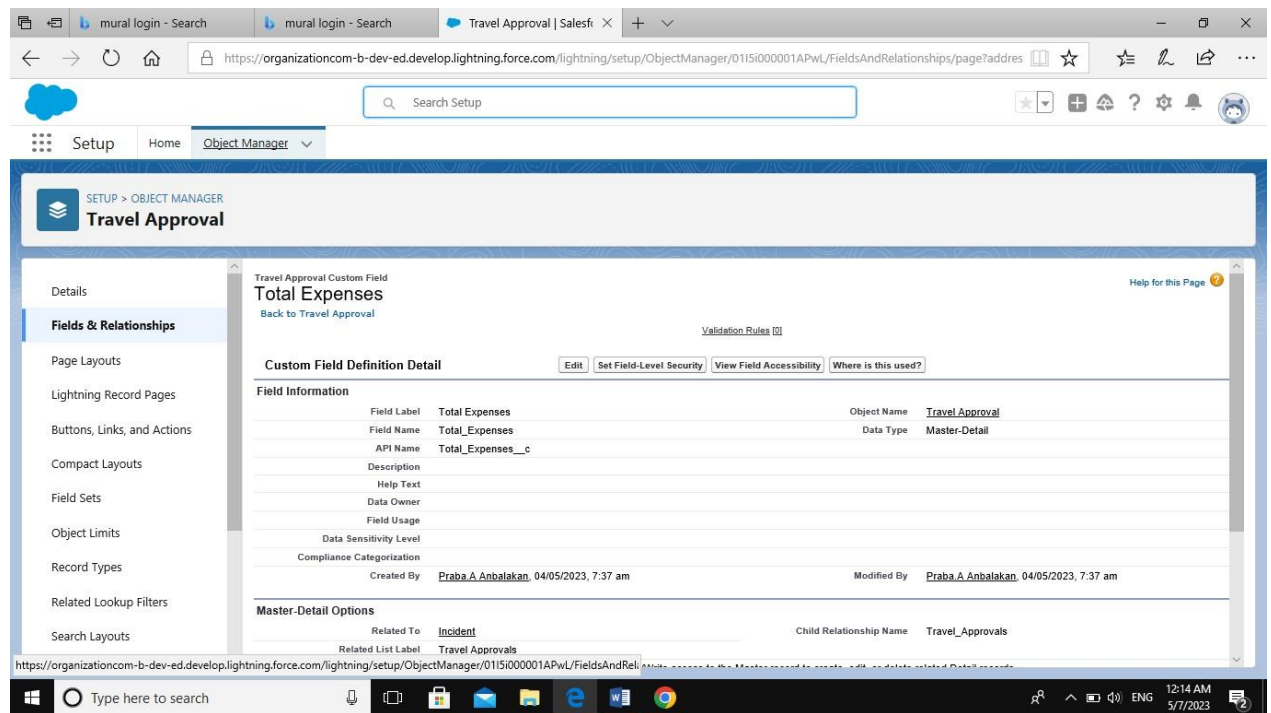


3. Click on the new created profile

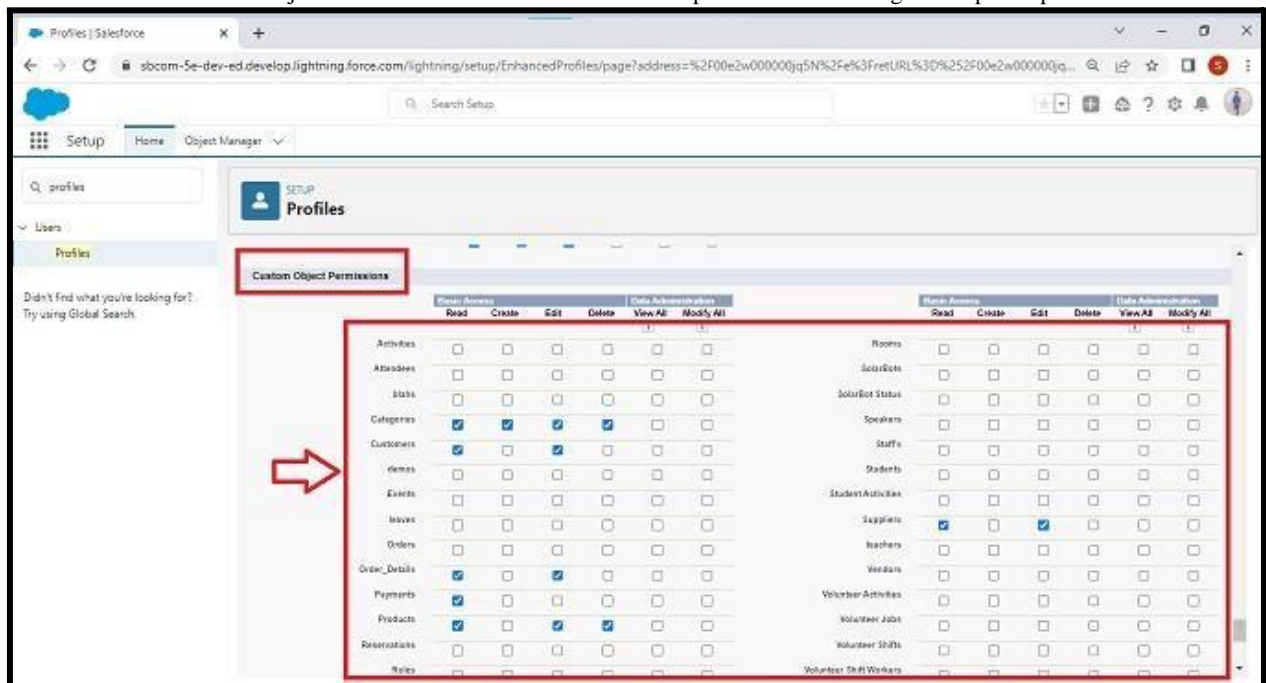


4. While still on the profile page, then click Edit.





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

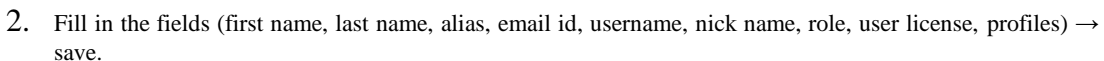


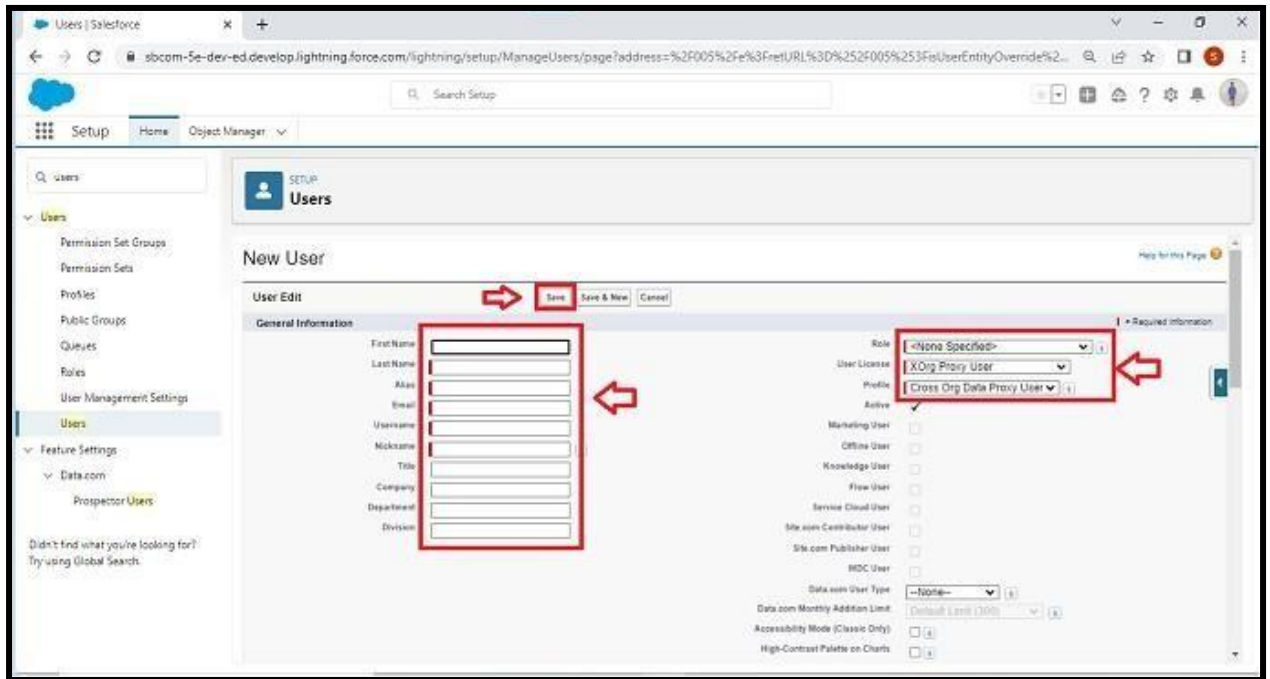
6. Sales Manager → Standard user Profile, Marketing Executive1 and Executive2 → Standard Platform User, Marketing Manager → Standard Platform User For

## Milestone7-New User 7

- ### Activity 1:

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





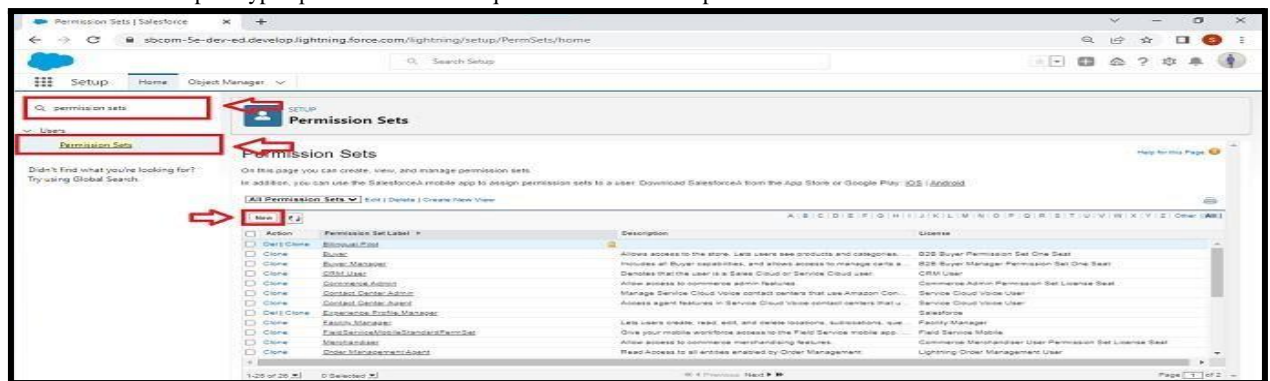
## Milestone8-Permission Set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

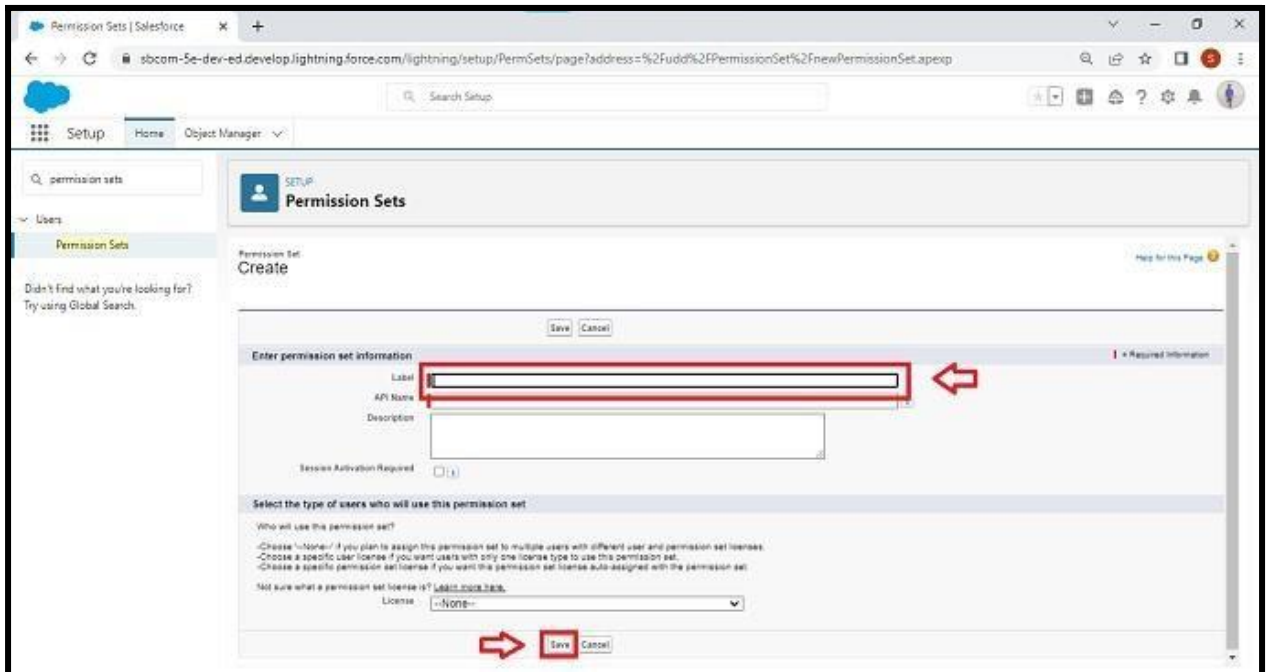
### Activity 1:

#### Create the Permission Sets

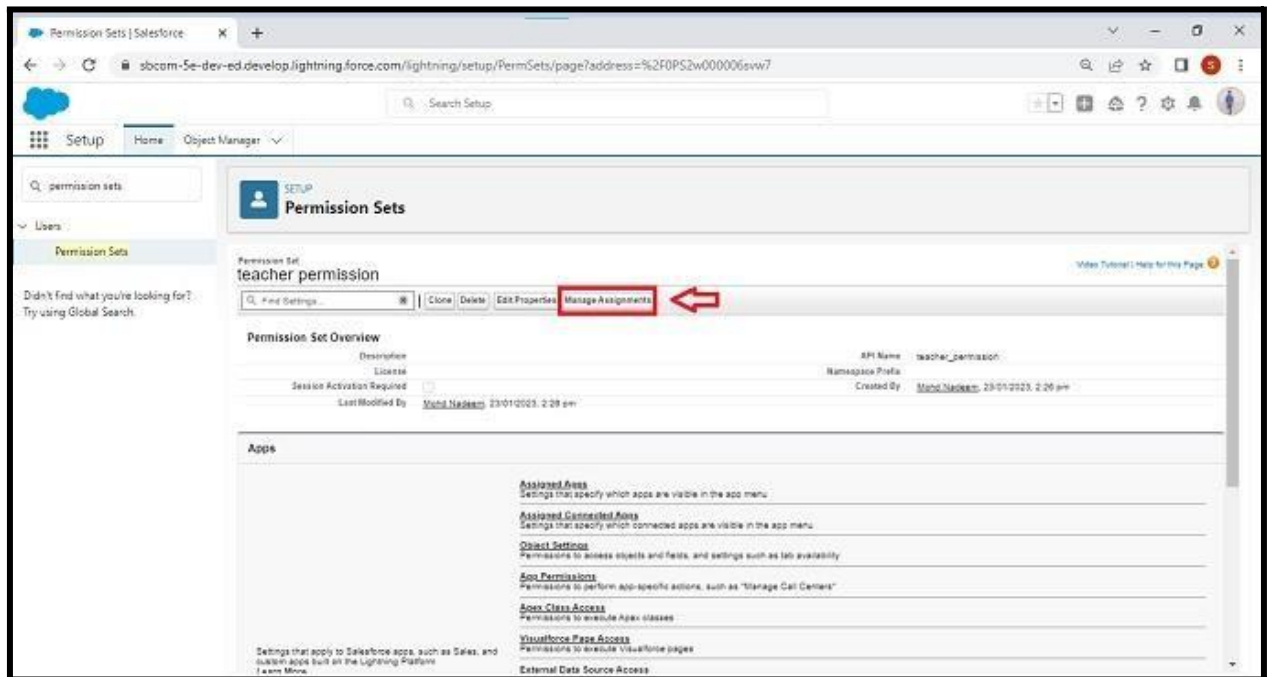
1. Go to setup → type “permission sets” in quick search → select permission sets → New.



2. Enter the label name → save.



3. After saving the permission click on the Manage assignment



4. Now click on the Add Assignment





## Milestone 9: Setup For OWD

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

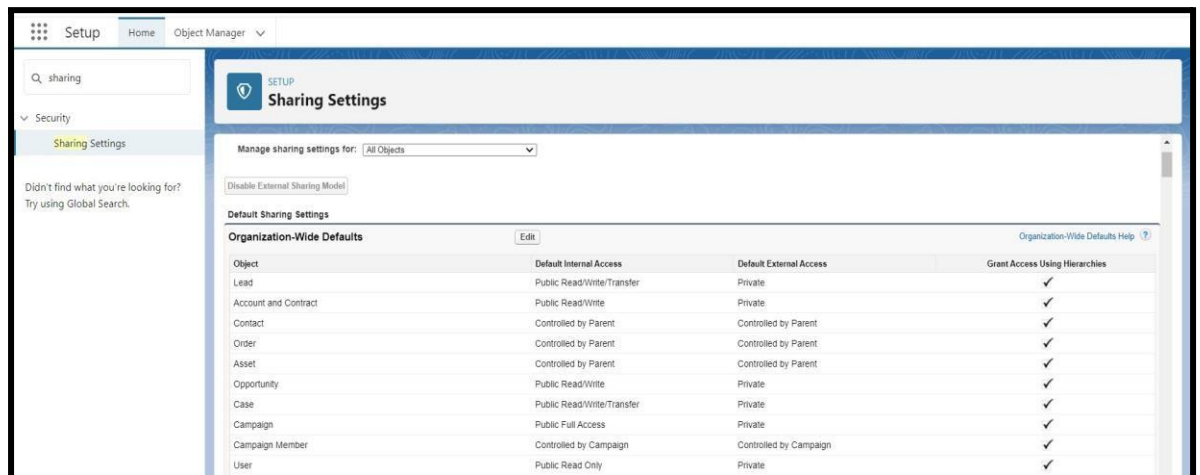
Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

- Public Read/Write/Transfer (only available of Leads and Cases)
- Public Read/Write
- Public Read/Only
- Private

### Activity1:

#### Create 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

Work Type Group	Public Read/Write ▼	Private ▼	<input checked="" type="checkbox"/>
Lead	Private ▼	Private ▼	<input checked="" type="checkbox"/>
Rent	Private ▼	Private ▼	<input checked="" type="checkbox"/>
<b>Other Settings</b>			
Standard Report Visibility <input checked="" type="checkbox"/> ⓘ		Manual User Record Sharing <input type="checkbox"/> ⓘ Manage	
Save		Cancel	

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

## Activity 2:

### Marketing

1. Create the Record Level OWD Setting give it As A Private To Marketing manager And Marketing Executive

### Sales:

1. Sale Manager OWD is Set As Private similarly sales Rep1, Sales Rep2 same OWD for them

## Milestone10-Report

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

Tabular

Summary

Matrix

Joined

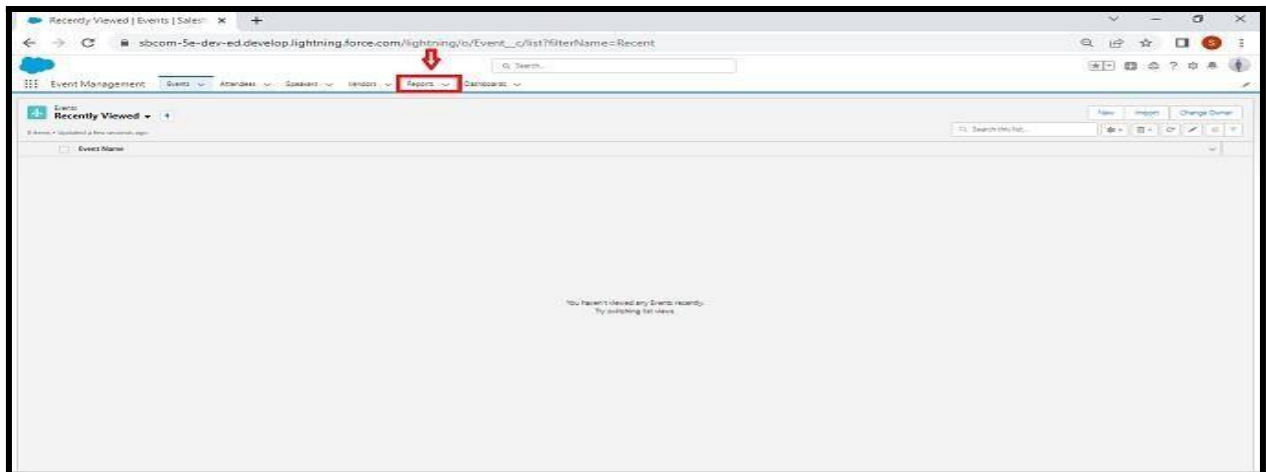
Reports

## Activity 1:

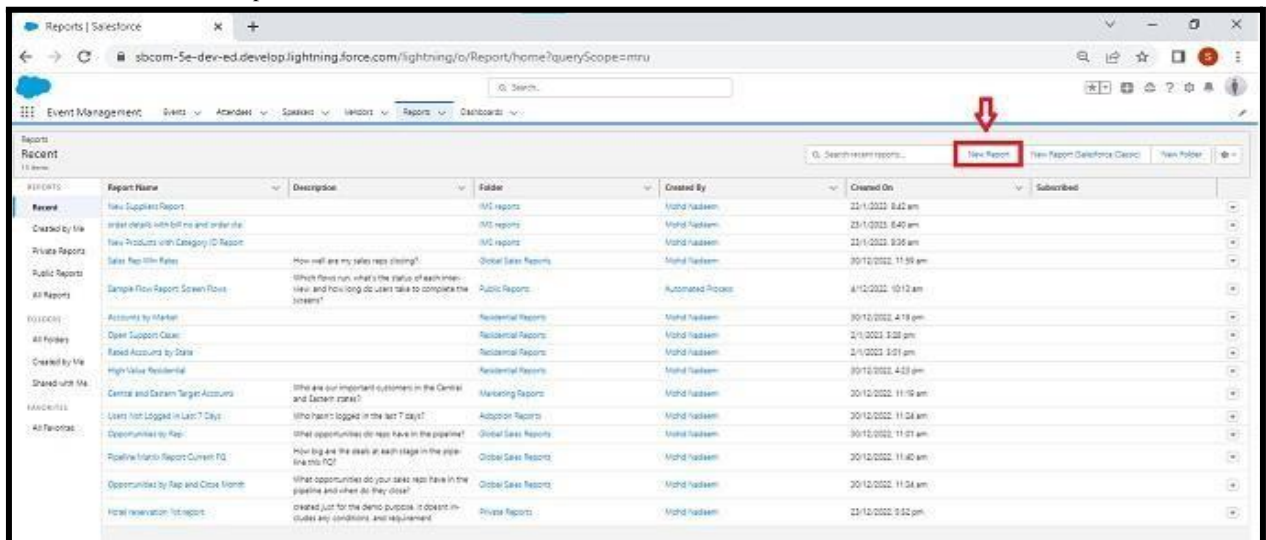
### Create Report™



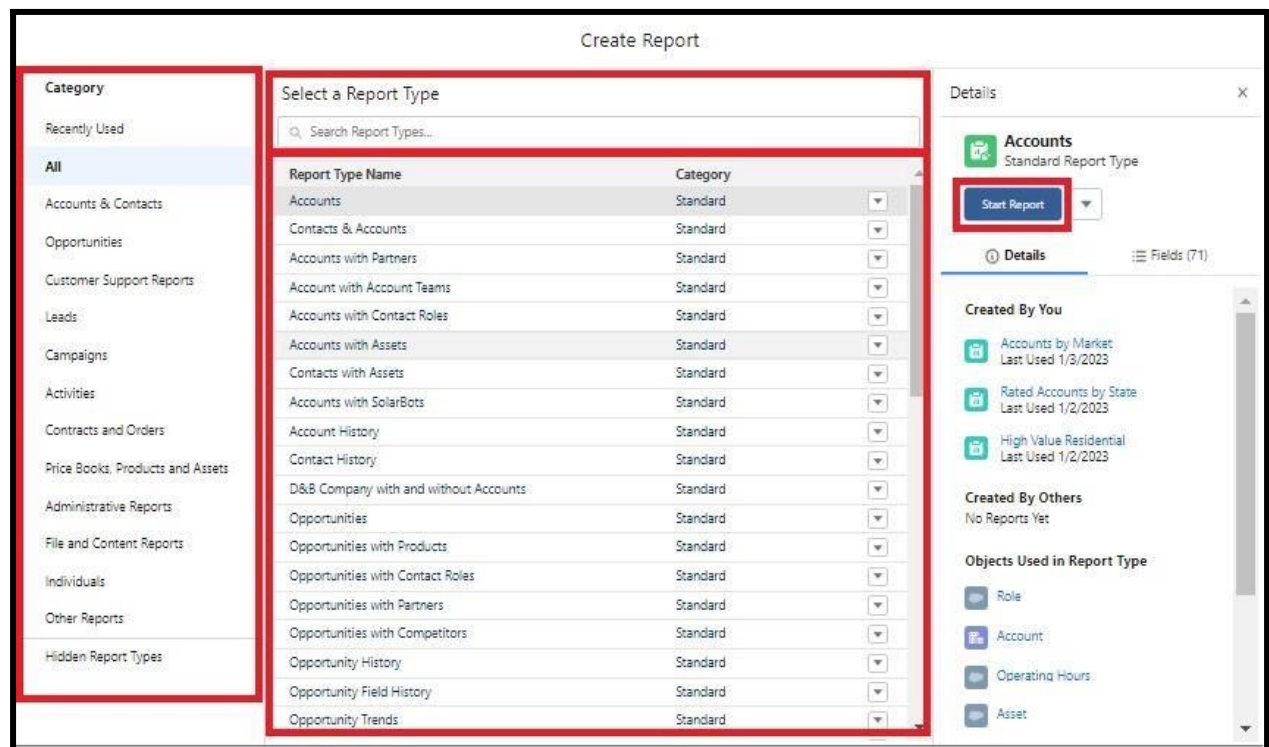
1. Go to the app → click on the reports tab



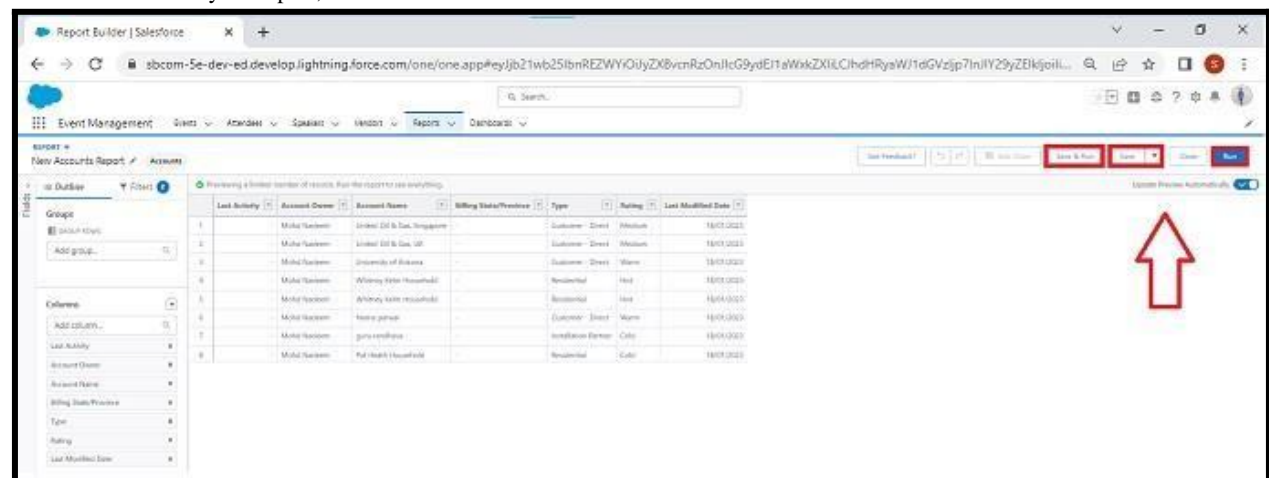
2. Click New Report



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.



### Create Report for following Condition

1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the Property
2. The Condition should be Like Loan Amount  $\geq$  to 5000\$

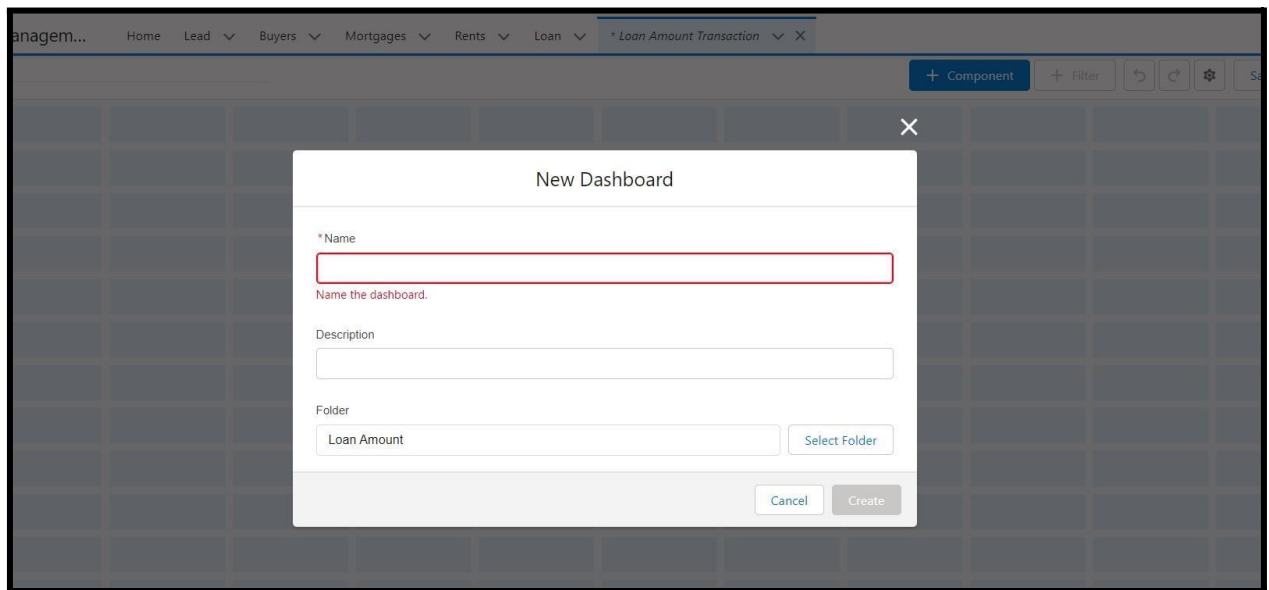
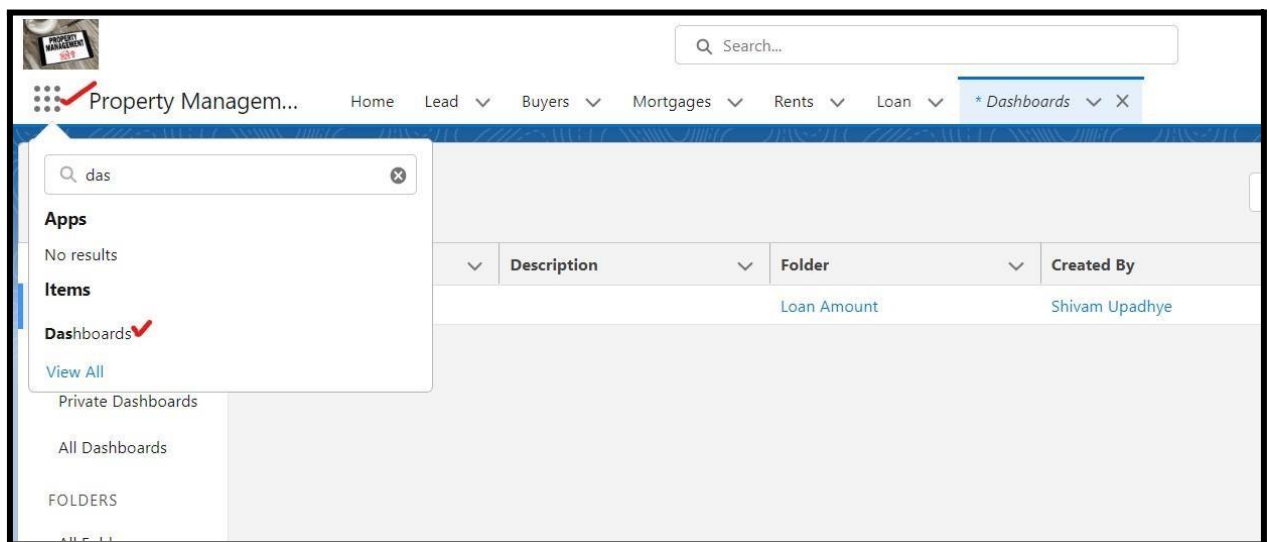
## Milestone11-Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

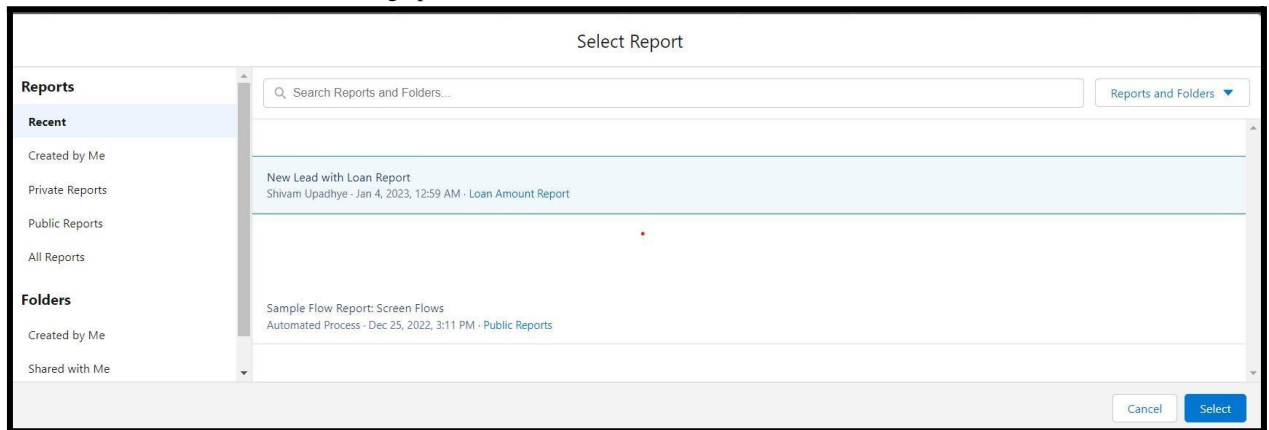
### Activity1:

#### Create dashboards

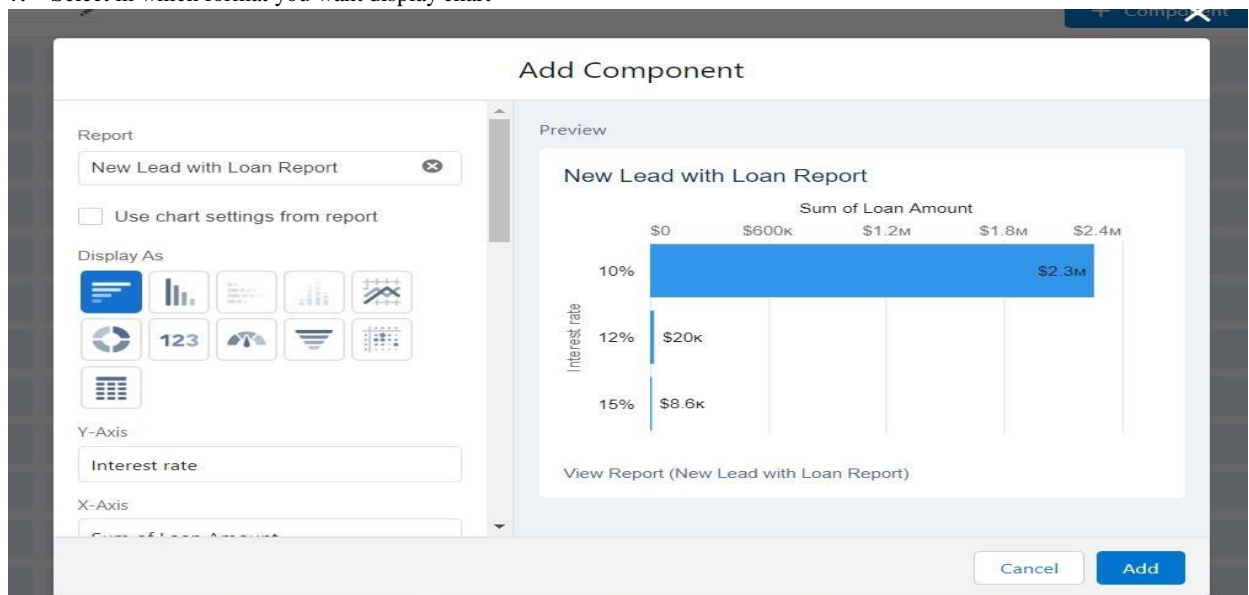
1. Go to the App Launcher and select the Dashboards 2.  
Select add component

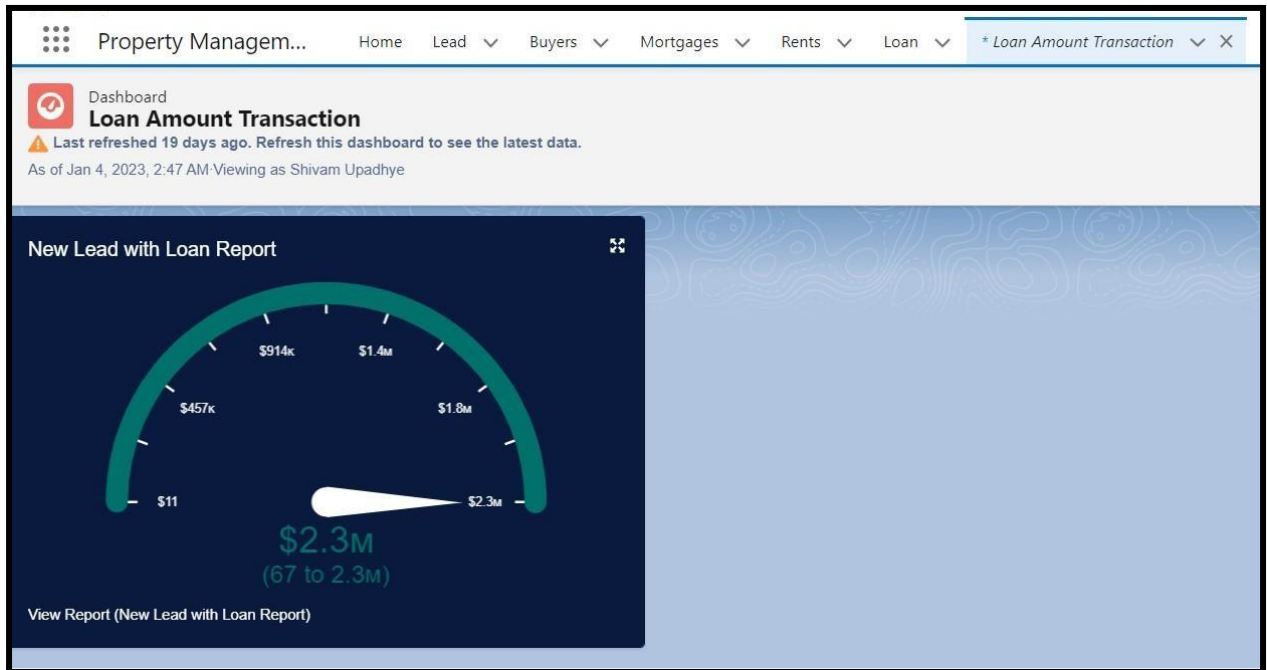


3. Select the folder select the following option new lead with loan Amount



4. Select in which format you want display chart





TRAILHEAD PROFILE PUBLIC URL;

- Team Leader : <https://trailblazer.me/id/aanpalagana>
- Team Member 1 : <https://trailblazer.me/id/ppandichellam>
- Team Member 2 : <https://trailblazer.me/id/mmukila2>
- Team Member 3 : <https://trailblazer.me/id/mmari500>

## **DISADVANTAGES**

Long working hours- Although very rewarding, the hotel industry is characterized by early starts and late finishes. You'll have to put in long working hours no matter your role. 2 – Lots of physical labor- One cannot be laid back and do a desk job in this business.

## **ADVANTAGES**

Salesforce is the CRM industry leader with 20% of the market. Salesforce for real estate helps provide clients with a more personalized experience via advanced in-built sales and marketing automation tools, AI-powered analytics, customizable reports, and dashboards.

## **CONCLUSION**

Properties can be used to validate data before a change is made, to prompt an action when data is changed (such as altering the value of other member variables), or to expose data that is retrieved from some other source (such as another class).