

# Project Report Template

## INTRODUCTION: -

### 1.1 Overview

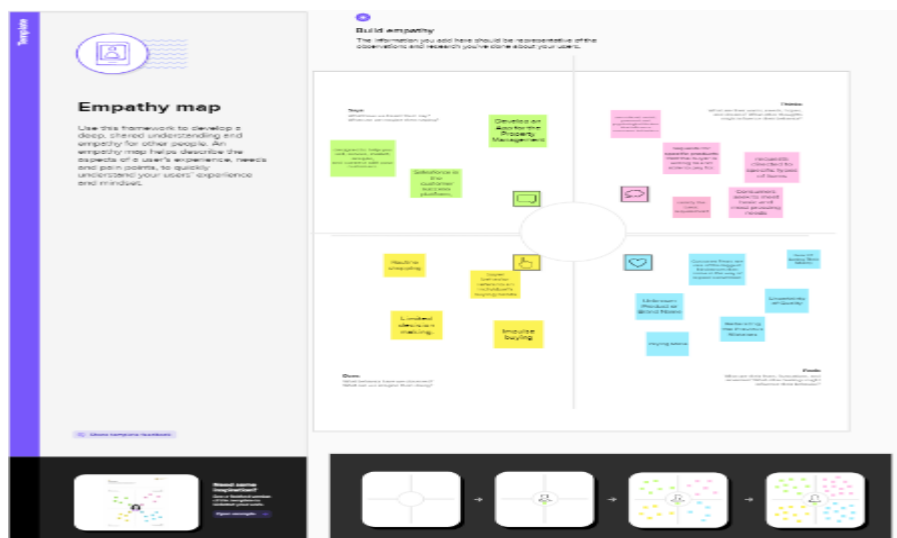
Property Management enables the Salesforce For Real Estate companies to keep a track of crucial data about financial & household properties incorporating associated cash flow, primary tenants, and occupancy rates.

### 1.2 Purpose: -

Property Management systems **allow local property managers and maintenance personnel to manage the day-to-day operations of their properties**. Property maintenance for commercial properties includes major focus areas such as risk management, maintenance, communication, and tenant satisfaction.

## 2.Problem Definition and Design Thinking: -

### 2.1. Empathy Map



## 2.2 Ideation and Brainstorming map Screenshot:

### Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

⌚ 10 minutes to prepare  
 👤 1-4 people for collaboration  
 👥 2-6 people for prioritization

**Before you collaborate**

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

⌚ 10 minutes

- Team gathering**  
Define who should participate in the session and send an invite. Share relevant information or previous ideas.
- Set the goal**  
Think about the problem you'll be focusing on during the brainstorming session.
- Learn how to use the facilitation tools**  
Use the Facilitation Guidebook to run a happy and productive session.

[Open article](#)

**1 Define your problem statement**

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

⌚ 5 minutes

**Exercise**

How might we make customer service more available to customers?

**Key rules of brainstorming**

To run an smooth and productive session

- Stay on topic
- Defers judgment
- Go for volume
- Encourage wild ideas
- Listen to others
- If possible, be visual

**2 Brainstorm**

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

**TIP**

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

**B.Nikitha**

Understand customer needs	Customer and share examples of great service	Design customer experience and complaints

**A.Malathi**

Seek and provide customer feedback	Consider and address customer service	Make it easy for customers to complain
Build a customer feedback system culture		

**S.Nivetha**

Get and communicate clear service standards	Personalize your customer service	Find out what's really going on
Test your staff as you test your customers		

**K.Mahalakshmi**

	Sound a customer service warning	Check out your complaints
Include support team members		

**3 Group ideas**

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-five label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

⌚ 20 minutes

**Customer service**

Personalize your customer service	Get and communicate clear service standards	Respond to customer complaints
Design customer service experience		

**customer requirement**

Understand customer needs	Test your staff as you test your customers

**Customer review**

Sound a customer service warning	Check out your complaints

**Complaints**

Understand customer needs	Make it easy for customers to complain

**Team**

Get and communicate clear service standards	Personalize your customer service
Test your staff as you test your customers	



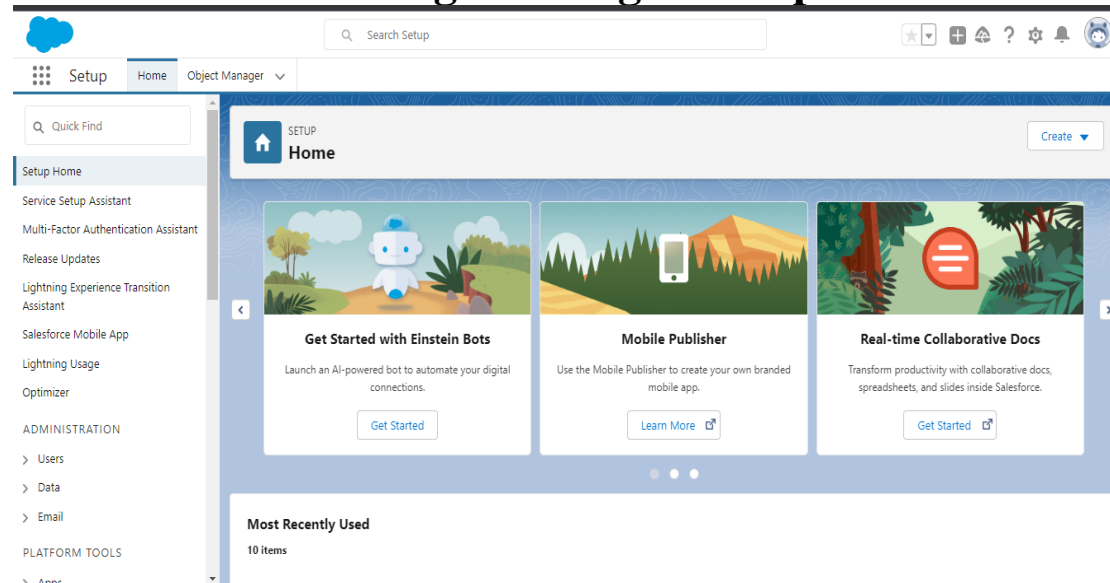
### 3.RESULT: -

#### 3.1 Data Model:

Object name	Fields in the Object
Object -1	Field Label:Buy Data Type:Picklist
Object-2	Field Label:Rent Data Type:Autonumber
Object-3	Field Label:Loan Data Type: Autonumber

#### 3.2 Activity and Screenshot: -

### Create salesforce Org-creating Developer Account



# Object:

## Creation of Buy object:

Setup

Home

Object Manager

Search Setup

Star

Dropdown

Grid

Cloud

Help

Settings

12

Avatar

SETUP > OBJECT MANAGER

Buy

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Details

Description

API Name

Buy\_\_c

Custom

✓

Singular Label

Buy

Plural Label

Buyers

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

## Creation of Rent object:

Setup

Home

Object Manager

Search Setup

Star

Dropdown

Grid

Cloud

Help

Settings

12

Avatar

SETUP > OBJECT MANAGER

Loan

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

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Deployed

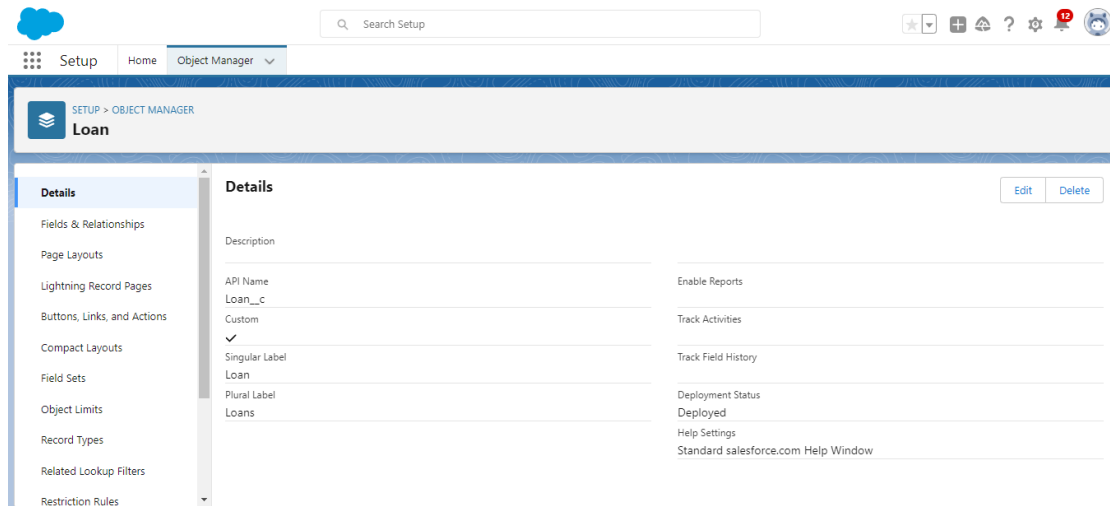
Help Settings

Standard salesforce.com Help Window

Edit

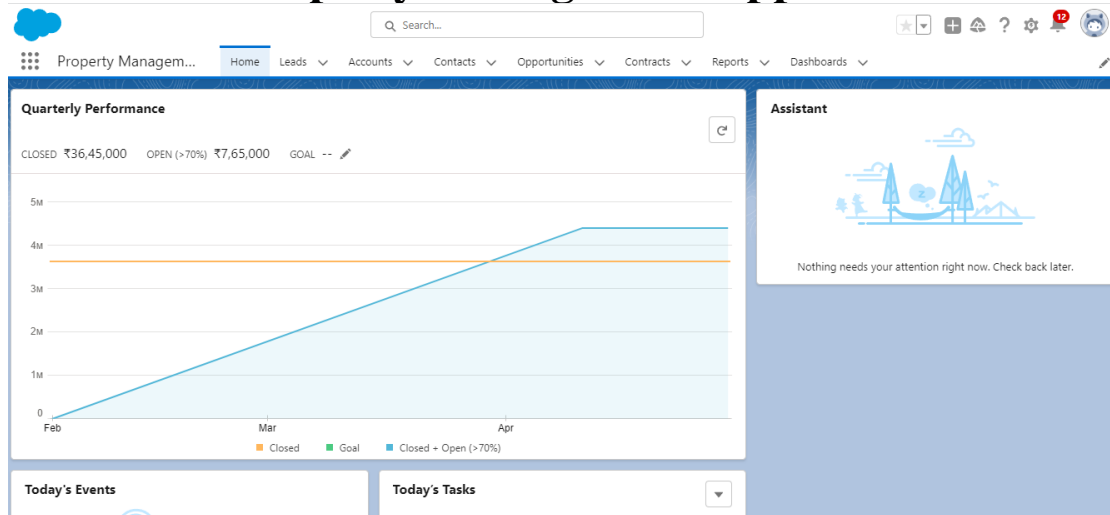
Delete

## Creation of Loan object:



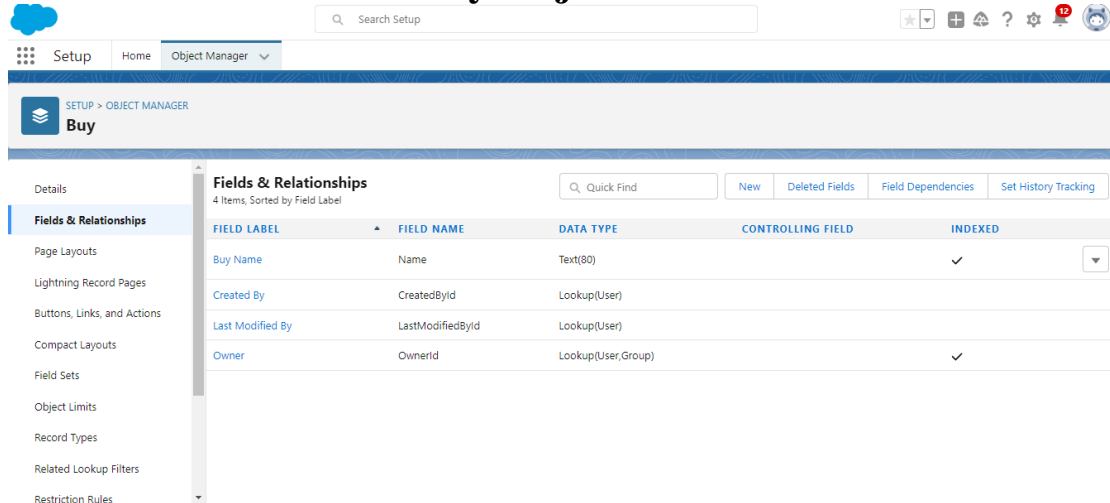
The screenshot shows the Salesforce Setup interface for the 'Loan' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Restriction Rules'. The main content area is titled 'Details' and includes fields for 'Description', 'API Name' (Loan\_\_c), 'Custom' (checked), 'Singular Label' (Loan), 'Plural Label' (Loans), 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), 'Help Settings', and 'Standard salesforce.com Help Window'. There are 'Edit' and 'Delete' buttons in the top right corner.

## Lighting App Create the Property Management App



The screenshot shows the Salesforce Property Management app dashboard. The top navigation bar includes 'Home', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Contracts', 'Reports', and 'Dashboards'. The main content area features a 'Quarterly Performance' chart showing 'CLOSED ₹36,45,000', 'OPEN (>70%) ₹7,65,000', and a 'GOAL' line. The chart displays a line for 'Closed + Open (>70%)' and a horizontal line for 'Goal'. The right sidebar contains an 'Assistant' section with a message: 'Nothing needs your attention right now. Check back later.' Below the chart are sections for 'Today's Events' and 'Today's Tasks'.

## Field and Relationship Creation Field for the Buy Object



The screenshot shows the Salesforce Setup interface for the 'Buy' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Restriction Rules'. The main content area is titled 'Fields & Relationships' and includes a table with 4 items, sorted by Field Label. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

## Creation Field for the Rent Object

[Setup](#)
[Home](#)
[Object Manager](#)

SETUP > OBJECT MANAGER  
**Rent**

Details
 

**Fields & Relationships**  
 4 Items, Sorted by Field Label

[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
<a href="#">Created By</a>	CreatedById	Lookup(User)		
<a href="#">Last Modified By</a>	LastModifiedById	Lookup(User)		
<a href="#">Owner</a>	OwnerId	Lookup(User,Group)		✓
<a href="#">Rent Name</a>	Name	Text(80)		✓

Page Layouts  
 Lightning Record Pages  
 Buttons, Links, and Actions  
 Compact Layouts  
 Field Sets  
 Object Limits  
 Record Types  
 Related Lookup Filters  
 Restriction Rules

## Creation Field for the Loan Object

[Setup](#)
[Home](#)
[Object Manager](#)

SETUP > OBJECT MANAGER  
**Loan**

Details
 

**Fields & Relationships**  
 4 Items, Sorted by Field Label

[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
<a href="#">Created By</a>	CreatedById	Lookup(User)		
<a href="#">Last Modified By</a>	LastModifiedById	Lookup(User)		
<a href="#">Loan Name</a>	Name	Text(80)		✓
<a href="#">Owner</a>	OwnerId	Lookup(User,Group)		✓

Page Layouts  
 Lightning Record Pages  
 Buttons, Links, and Actions  
 Compact Layouts  
 Field Sets  
 Object Limits  
 Record Types  
 Related Lookup Filters  
 Restriction Rules

## Profile Creation On Profile

[Property Managem...](#)
[Home](#)
[Leads](#)
[Accounts](#)
[Contacts](#)
[Opportunities](#)
[Contracts](#)
[Reports](#)
[Dashboards](#)
[Nikitha B](#)

**Nikitha B**
[Edit](#)
[User Detail](#)

Learn new skills on Trailhead, the fun way to learn Salesforce.

Connect with fellow Trailblazers on the Trailblazer Community.

**Details**

Name	Manager
Nikitha B	

**Related**

Groups (0)

# Users

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Users listed include Admin\_Guest, B. Nikitha, Chatter Expert, Daniels\_Amy, Jackson\_Eric, Kim\_Ted, Larkin\_Noah, and Lorrette\_Maya. A 'Help for this Page' link is visible in the top right corner.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Admin_Guest	questadm	questadmin8894@gmail.com	Recruiter	<input type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	B. Nikitha	NB	nikitha.b9894@curious-otter-o1vva.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chathv.00d2w00000icpmea1.8igkv0oqlw9v@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit   Login	Daniels_Amy	adani	nikitha94@gmail.com	Sales Engineer	<input checked="" type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/> Edit   Login	Jackson_Eric	elack	nikitha4@gmail.com	Sales Engineer	<input checked="" type="checkbox"/>	Minimum Access - Salesforce
<input type="checkbox"/> Edit	Kim_Ted	tkim	nikitha93@gmail.com	Recruiter	<input type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/> Edit   Login	Larkin_Noah	nlark	nikitha994@gmail.com	VP of Services	<input checked="" type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/> Edit	Lorrette_Maya	mlorr	nikitha934@gmail.com	Accounts Receivable	<input type="checkbox"/>	Standard Profile - No Acct Delete

# Permission Sets

The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar has a navigation menu with 'Users' and 'Permission Sets'. The main content area is titled 'Sales Orders' and includes a search bar, a 'Find Settings...' button, and a 'Permission Set Overview' section. The overview shows the API Name 'Sales\_Orders', Namespace Prefix, Session Activation Required (checked), and Created By 'Nikitha B.' on 11/04/2023. Below the overview is a section for 'Apps' with links to 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', and 'App Permissions'.

# Reports

The screenshot shows the Salesforce Reports page. The top navigation bar includes 'Property Managem...', 'Home', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Contracts', 'Reports', 'Dashboards', and a user profile for 'Nikitha B.'. The left sidebar shows a 'Recent' report list with 29 items. The main content area displays a table of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. Reports listed include 'Sales Rep Win Rates', 'Users Not Logged in Last 7 Days Export D', 'Users Not Logged in Last 7 Days', 'Opportunities by Rep', 'Pipeline Matrix Report Current FQ', 'Opportunities by Rep and Close Month', and 'Central and Eastern Target Accounts'.

Report Name	Description	Folder	Created By	Created On	Subscribed
Sales Rep Win Rates	How well are my sales reps closing?	Global Sales Reports	Nikitha B	11/4/2023, 10:43 am	
Users Not Logged in Last 7 Days Export D	Who hasn't logged in the last 7 days?	Adoption Reports	Nikitha B	11/4/2023, 10:47 am	
Users Not Logged in Last 7 Days	Who hasn't logged in the last 7 days?	Adoption Reports	Nikitha B	11/4/2023, 10:15 am	
Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Nikitha B	11/4/2023, 9:55 am	
Pipeline Matrix Report Current FQ	How big are the deals at each stage in the pipeline this FQ?	Global Sales Reports	Nikitha B	11/4/2023, 10:35 am	
Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Nikitha B	11/4/2023, 10:22 am	
Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern states?	Marketing Reports	Nikitha B	11/4/2023, 10:09 am	

## 4. Trailhead Profile public URL

**Team Lead- <https://trailblazer.me/id/nikib18>**

**Team member 1- <https://trailblazer.me/id/kmahalakshmi6>**

**Team member 2- <https://trailblazer.me/id/malaa15>**

**Team member 3- <https://trailblazer.me/id/nnivee>**

## **5.ADVANTAGES & DISADVANTAGES:**

Purchasing a property management system not only allows you to bring all your processes together under one application, it may be an easy way to digitize your operations if you're still operating with pen, paper and file folders. Hands-on owners and managers can control the property and bookings from any location, while employees can carry out tasks with less time and effort.

### **● You can access your information from anywhere**

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.

### **● You'll save time and money by being more efficient**

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.

- **Guest satisfaction may increase with a smooth check-in process**

No one wants to arrive at their hotel after a long day of traveling only to be greeted with an awkward or burdensome check-in process. A property management system provides a single, efficient check-in procedure, requiring each of your employees to follow the same streamlined process. Your front desk will be able to handle both individual guests and tour bus rushes with ease, ensuring that each guest walks to his or her room with a positive first impression of your hotel.

## 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. 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.

## APPLICATION:

### 1. Ease

One of the benefits that you are sure to get from using a property management system is Ease. Ease in management of properties, buildings, tenants' caretaking, and even space management and accounting can all be gotten with a good property management system.

### 2. Access

Many times, there is a need to access or evaluate a property from some other place/ city. With a management system, you do not have to be present at all times to manage your property.

### 3. Communication

Using a property management system helps to also bridge the distance of communication. You can always reach your tenants, a repairer or get some other types of a service provider. A property management system helps to reduce all the stress that comes with communication.

### 4. Friendly User interface

Afraid that you may not be able to operate/ manage the system on your own? Not to worry, they are made with a friendly user interface such that you can easily navigate your way around it and also do things with little or no expertise.

## CONCLUSION:

Overall, property management systems **make it easier for coordinating the functions of the front office, guest management, sales, planning, and reporting.** It allows property owners to manage front desk operations, rates and promotions, and customer loyalty data, consolidating the status of all hotel properties in one place.

## FUTURE SCOPE:

Technology became essential when property management team members were suddenly forced to work from home. The integration of technology into the day-to-day operations allowed property managers to operate their business throughout the pandemic. Property managers are looking at more creative ways to increase their incomes. Some property managers are hesitant to become responsible for more properties under the current economic circumstances. At the same time, owners are reluctant to buy more properties. Property management has long been overlooked in the real estate industry, but the future of property management is brighter than ever.