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KULITHALAI -639120

DEPARTMENT OF PHYSICS

NAAN MUDHALVAN – SMART BRIDGE PROJECT

**PROJECT TITLE: PROPERTY MANAGEMENT APPLICATION
USING SALESFORCE**

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INDEX

S.NO	CONTENT	PAGE NO
1	INTRODUCTION	3
2	Problem Definition & Design Thinking	4
3	Activity & Screenshot	6
4	Trailhead Profile Public URL	30
5	ADVANTAGES & DISADVANTAGE	30
6	APPLICATIONS	31
7	CONCLUSION	32
8	FUTURE SCOPE	32

INTRODUCTION

Property management is an essential aspect of real estate management that deals with the administration, operation, and maintenance of various properties.

Salesforce, being a leading CRM platform, can be an effective tool for managing property-related activities. A property management application developed using Salesforce can streamline various processes related to property management, such as property listing, rental management, tenant management, maintenance, and accounting.

A Salesforce-powered property management application can help property managers automate many of their daily tasks, making it easier for them to keep track of various properties and tenants. With Salesforce, managers can easily maintain detailed records of their properties, including information about tenants, occupancy rates, rental payments, and maintenance schedules. Furthermore, they can easily create and manage lease agreements, track expenses, generate financial reports, and more.

Overall, a property management application using Salesforce can provide an effective and efficient solution for managing properties of various types, whether it be residential or commercial. With its powerful tools and comprehensive features, Salesforce can help property managers stay organized, reduce better results for their clients and their own business.

OVERVIEW :

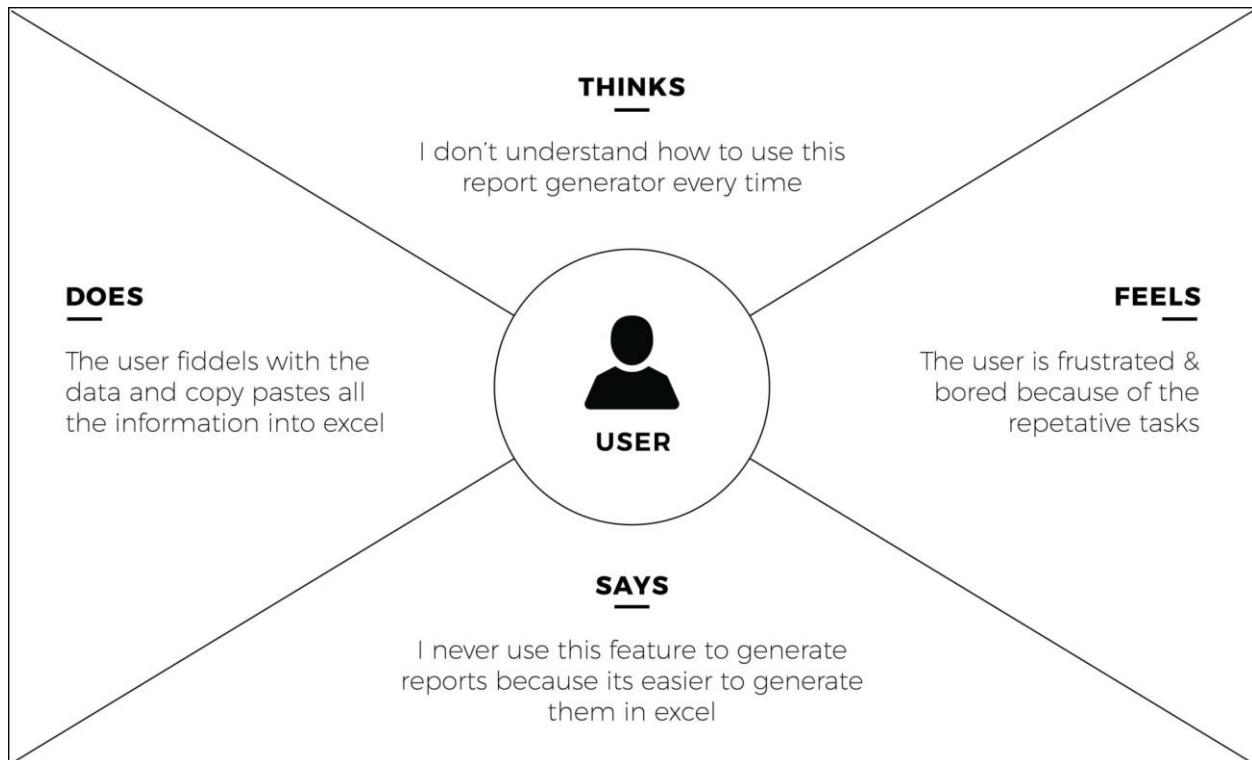
Salesforce is a powerful customer relationship management (CRM) platform that can be used to build a wide variety of applications. A property management application using Salesforce can help property managers streamline their operations, improve communication with tenants and property owners, and track maintenance requests and other important data.

PURPOSE:

A property management application using Salesforce has the purpose of providing a comprehensive tool for property owners, managers and tenants to manage their properties, track their rental income, and automate property maintenance tasks.

- Evaluate property expenses and income
- Advertise your rental properties online
- Manage rents
- Abide by the landlord-tenant & real estate laws.

EMPATHY MAP



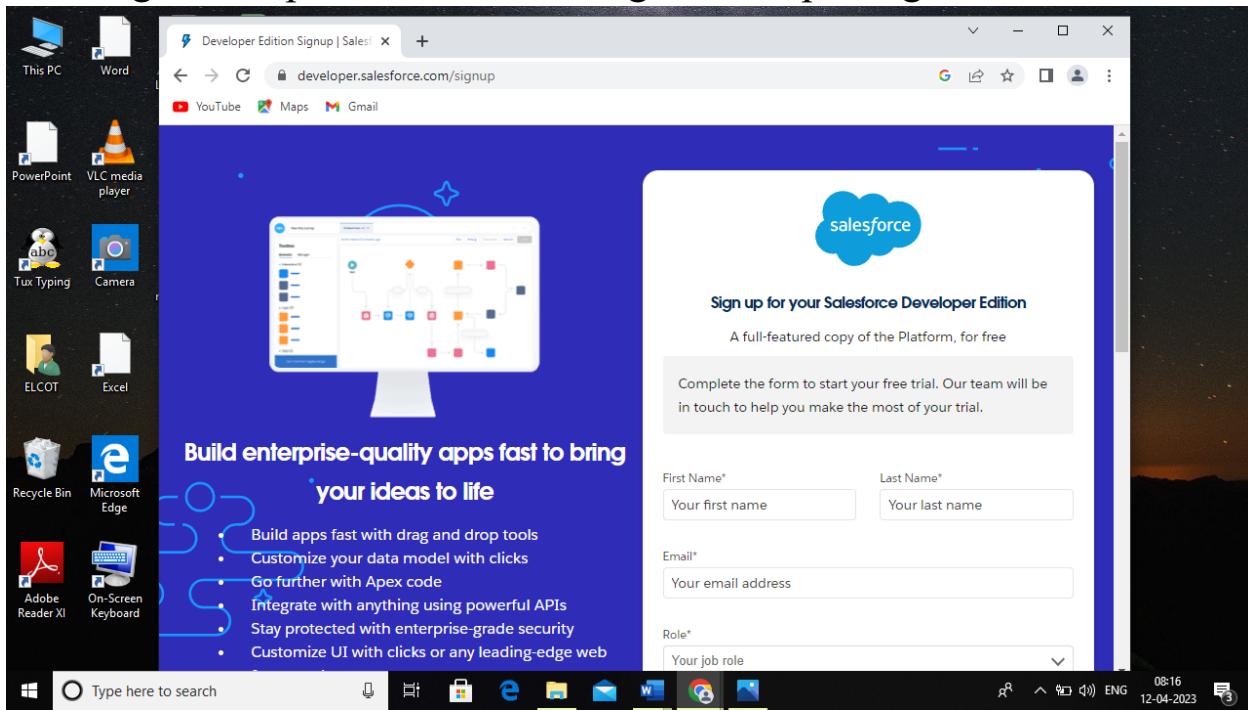
BRAIN STORMING MAP



Milestone 1- Salesforce:

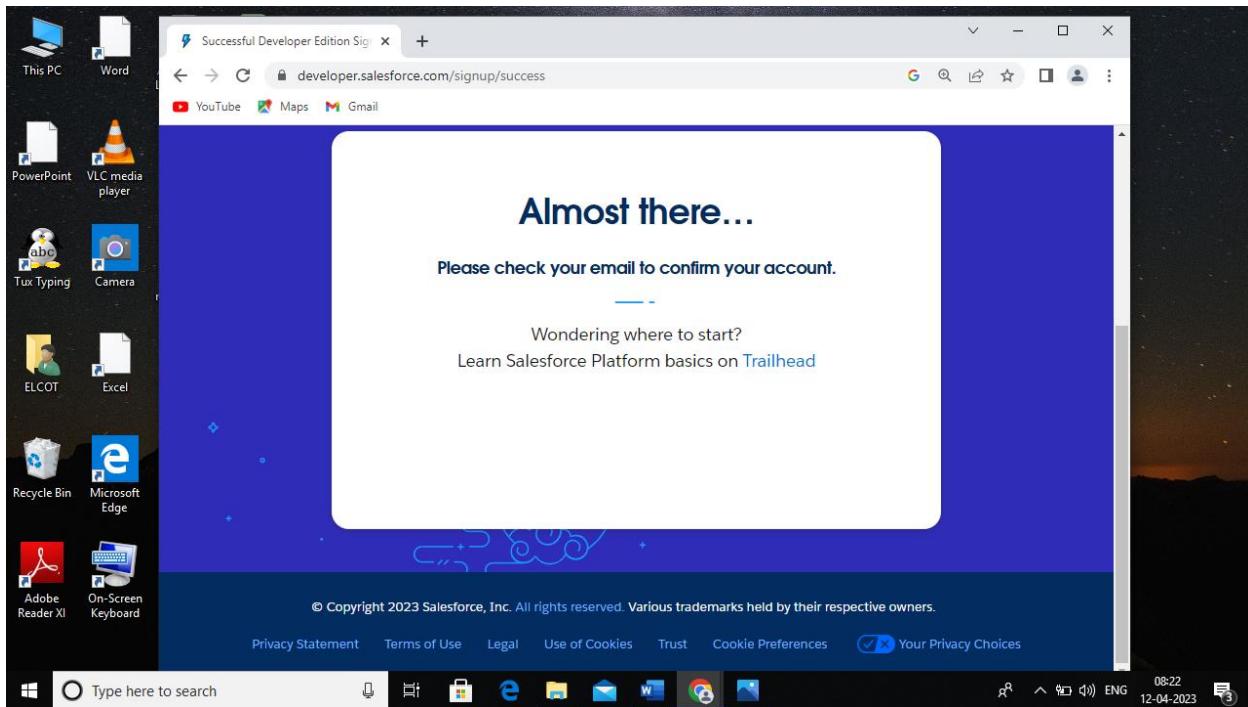
Activity 1:

Creating Developer Account Creating a developer org in salesforce



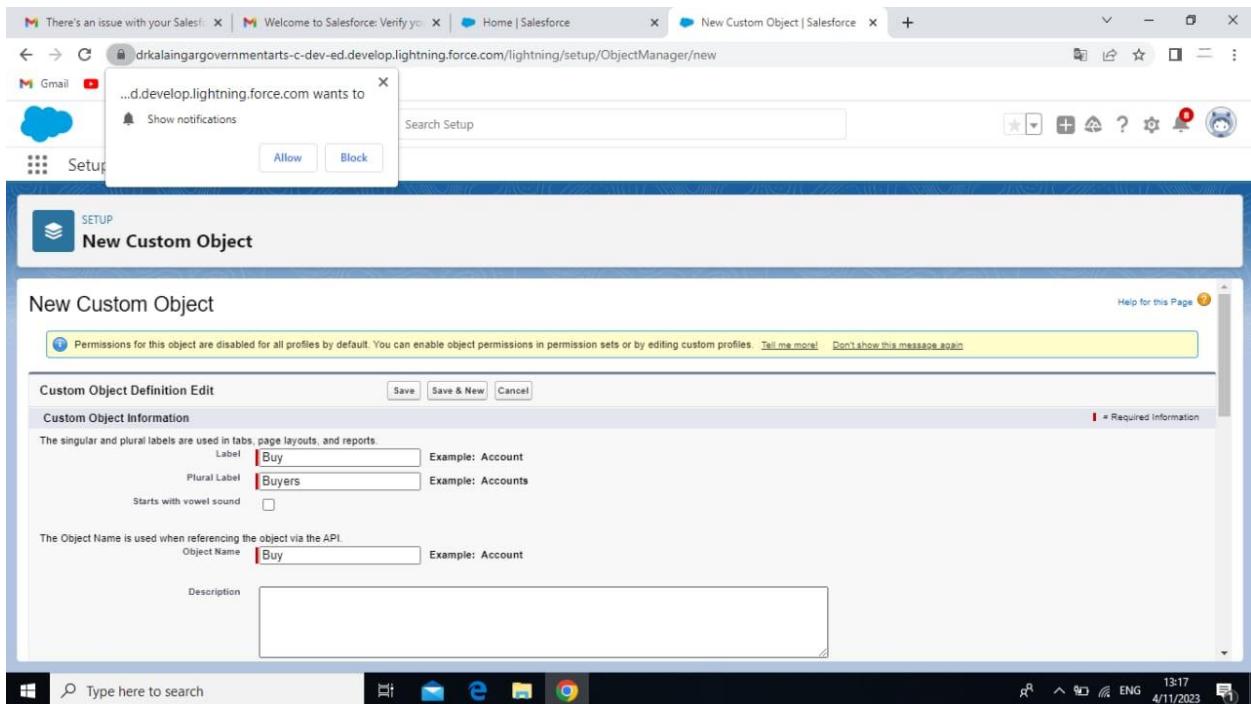
Activity 2:

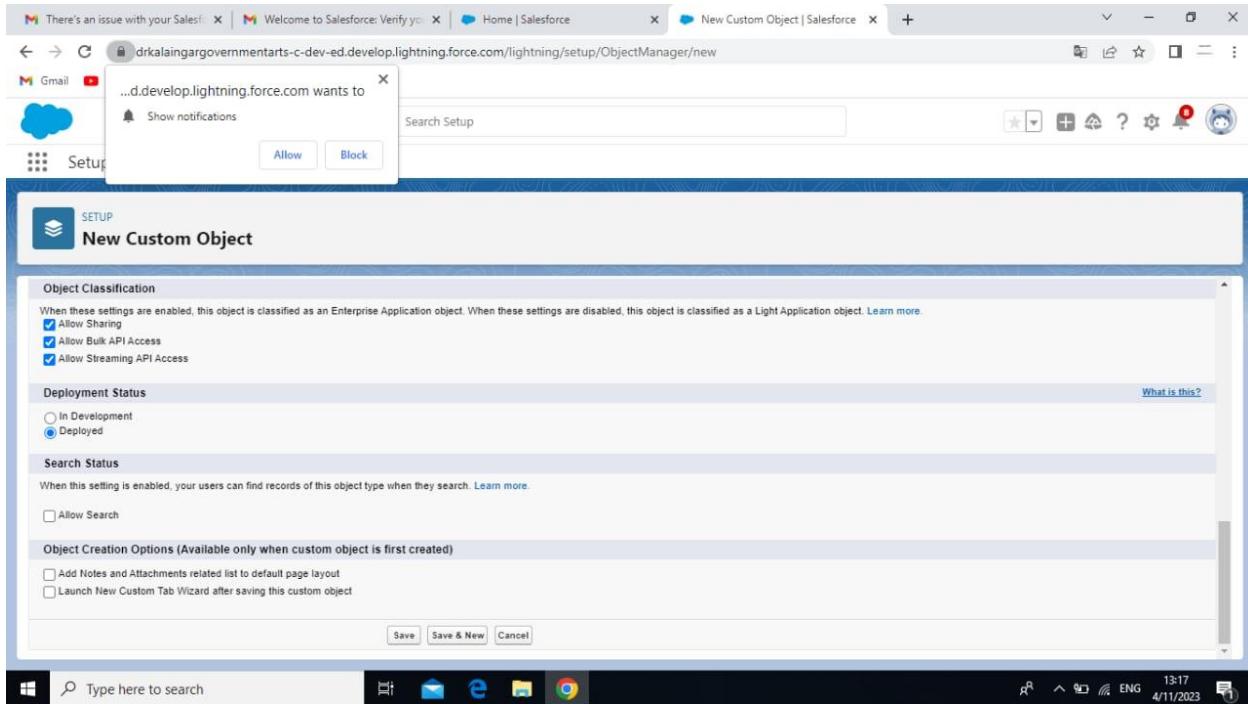
Account Activation



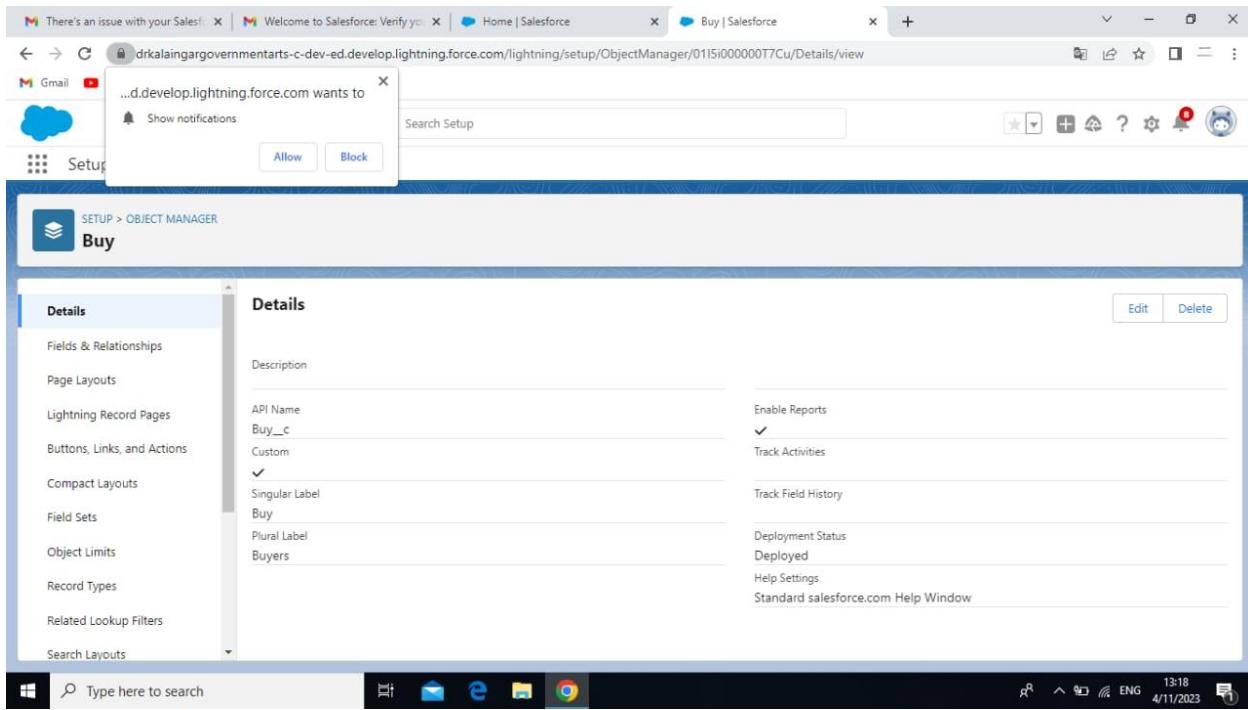
Milestone 2 – Object

Activity 1:





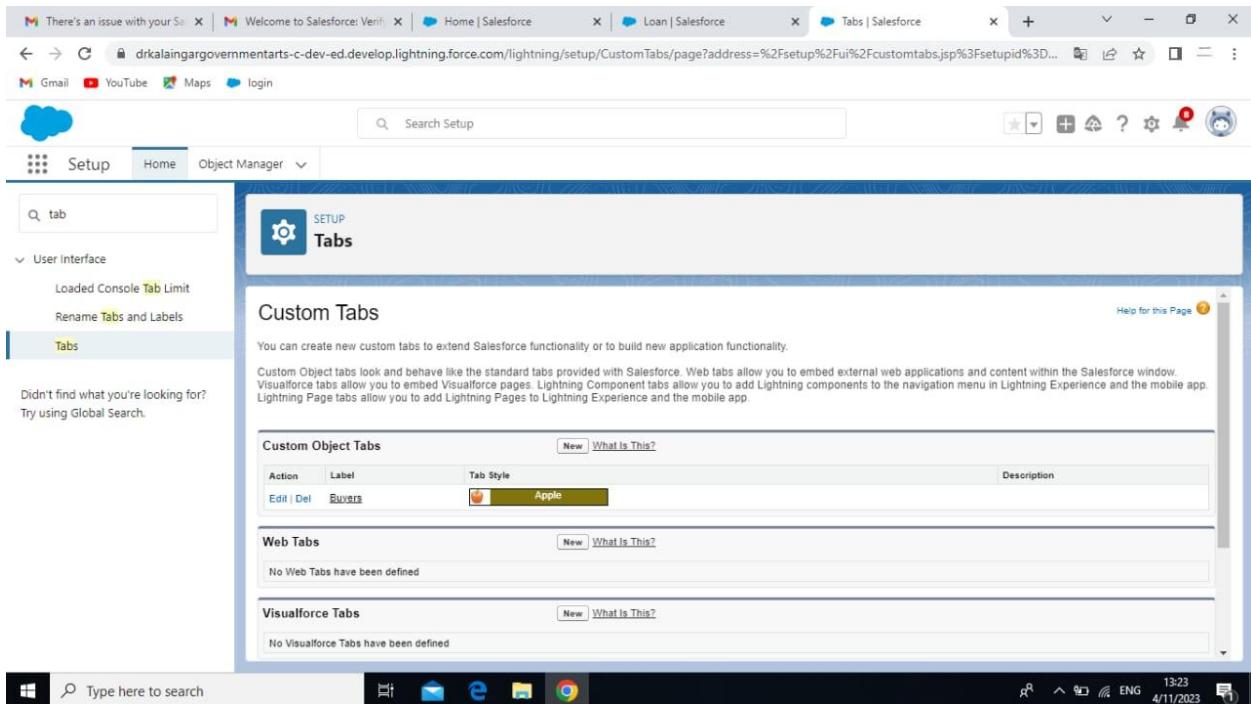
Activity 2:



Milestone 3 – Tab

Activity 1:

Create the Lighting Tab



Custom Tabs

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

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

Action	Label	Tab Style	Description
Edit Del	Buyers	Apple	
Edit Del	Loans	Car	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

Activity 2:

Custom Tabs

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

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

Action	Label	Tab Style	Description
Edit Del	Buyers	Apple	
Edit Del	Loans	Car	
Edit Del	Rents	Building	

Web Tabs

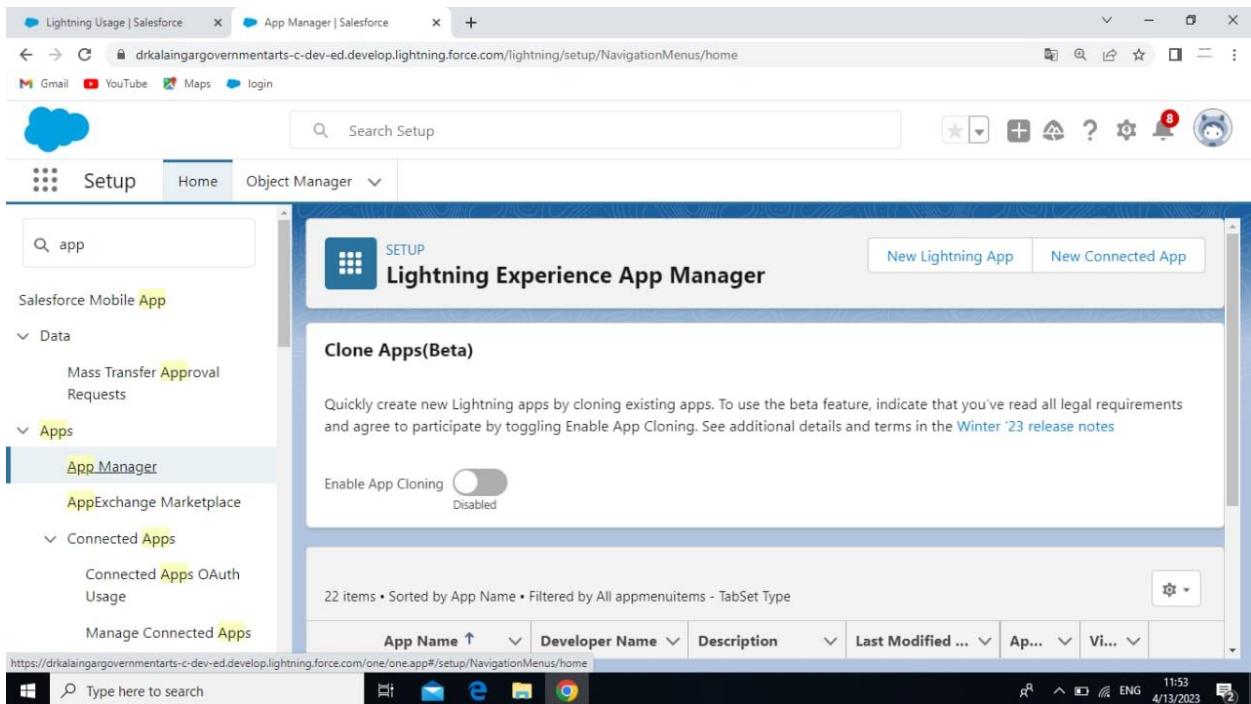
No Web Tabs have been defined

New What Is This?

Milestone 4- The Lightning APP

Activity 1:

Create the Lightning App



The screenshot shows the 'Lightning Experience App Manager' page. At the top, there's a search bar and a 'Clone Apps(Beta)' section with a toggle switch labeled 'Disabled'. Below this is a table listing 22 items, sorted by App Name. The columns include App Name, Developer Name, Description, Last Modified, Type, and Visibility. The table shows entries like 'All Tabs', 'Analytics Studio', 'App Launcher', and 'Bolt Solutions'.

App Name	Developer Name	Description	Last Modified	Type	Visibility
All Tabs	AllTabSet		11/04/2023, 1:08 pm	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	11/04/2023, 1:08 pm	Classic	
App Launcher	AppLauncher	App Launcher tabs	11/04/2023, 1:08 pm	Classic	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	11/04/2023, 1:10 pm	Lightning	

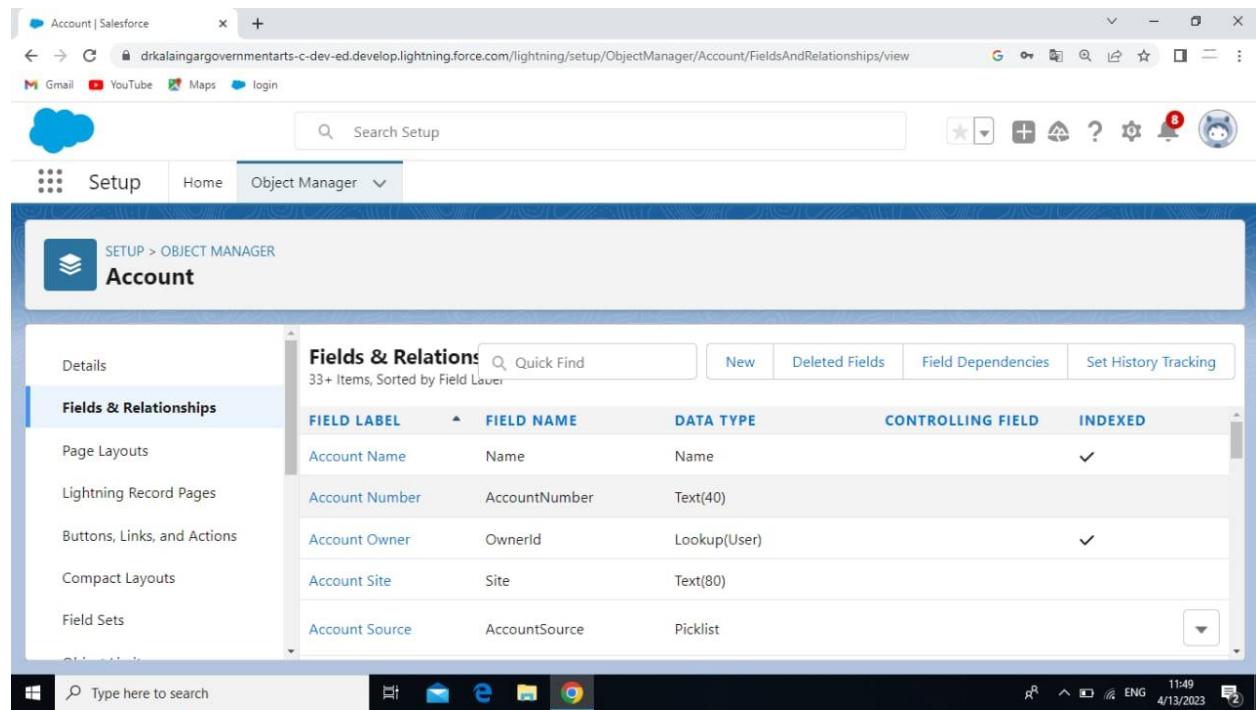
The screenshot shows the 'New Lightning App' configuration page. Under the 'Navigation Items' section, it says: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' A 'Selected Items' list is shown, containing 'Accounts'. Below this is a 'Next' button. The bottom of the screen shows a table of available items, similar to the one in the previous screenshot.

App Name	Developer Name	Description	Last Modified	Type	Visibility
All Tabs	AllTabSet		11/04/2023, 1:08 pm	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	11/04/2023, 1:08 pm	Classic	
App Launcher	AppLauncher	App Launcher tabs	11/04/2023, 1:08 pm	Classic	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	11/04/2023, 1:10 pm	Lightning	

Milestone 5- Fields

Activity 1:

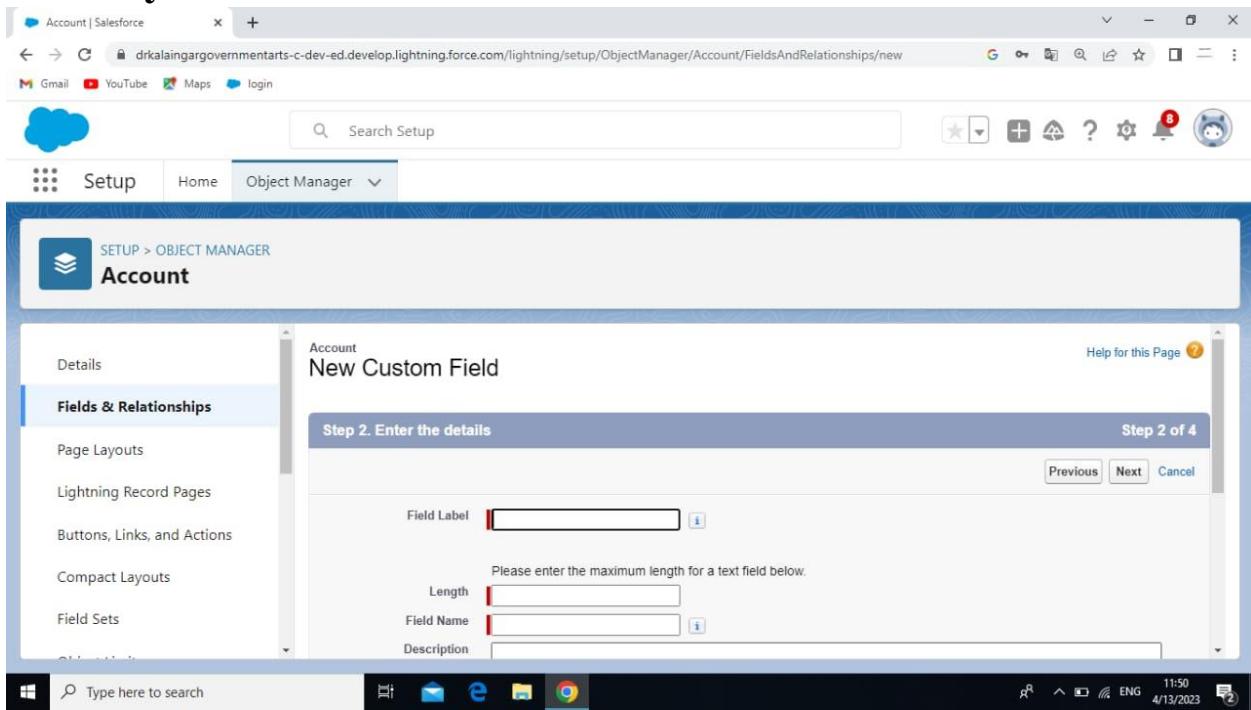
Create the Lead Field



The screenshot shows the Salesforce Object Manager interface for the Account object. The left sidebar lists options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main content area is titled 'Fields & Relations' and displays a table of existing fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		

Activity 2:



/

Milestone 6-Profile

Activity 1:

To Create a new Profile

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

You must select an existing profile to clone from.

Existing Profile: Standard User
User License: Salesforce
Profile Name:

Save Cancel

Profile Detail

Name	Buy	User License	Salesforce	Custom Profile	
Description		Created By	THANIKACHALAM K. 11/04/2023, 2:47 pm	Modified By	THANIKACHALAM K. 11/04/2023, 2:51 pm

Page Layouts

Standard Object Layouts	Global Layout	Object Milestone Layout
Email Application	Not Assigned	Operating Hours Layout

Activity 2:

Create Marketing

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar has a search bar and navigation links for 'Users' (selected), 'Data', 'Feature Settings', 'Data.com', 'Prospector Preferences', 'Prospector Users', 'Functions', and 'Marketing'. The main content area is titled 'SETUP Profiles' and contains a table of permissions:

	Basic Access				Data Administration		Basic Access				Data Admin	
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Authorization Forms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Authorization Form Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Contact Point Phones	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Authorization Form Data Uses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Contact Point Type Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Authorization Form Texts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Data Use Legal Bases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Communication Subscriptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Data Use Purposes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Communication Subscription Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Engagement Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Milestone 7- New User

Activity 1:

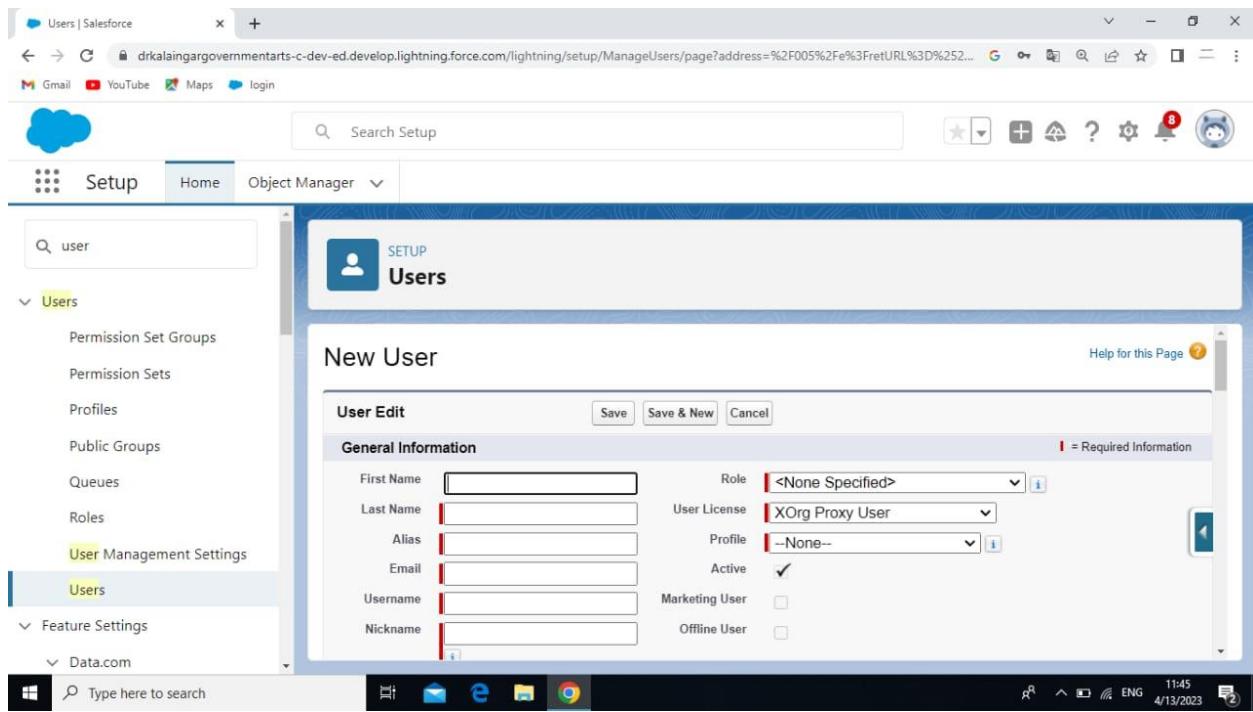
Create User

The screenshot shows the Salesforce Setup interface with the 'Users' page open. The left sidebar has a search bar and navigation links for 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings' (selected), and 'Prospector Users'. The main content area is titled 'SETUP Users' and shows a user record for 'Thanikachalam K' with the following details:

User Detail

Name	Thanikachalam K	Role	Cross Org Data Proxy
Alias	tk	User License	Cross Org Data Proxy User
Email	thankavp20@gmail.com	Profile	
Username	thankavp20@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16812057364033853834	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

Other sections visible in the main content include 'Permission Set Assignments', 'Public Group Membership', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Connected Apps', 'Third-Party Account Links', 'Authentication Settings for External Systems', 'Login History', and 'User Provisioning Accounts'.



Milestone 8- Permission Set

Activity 1:

Create the Permission Sets

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. The left sidebar has 'Permission Sets' selected. The main area displays the 'Buy' permission set with the following details:

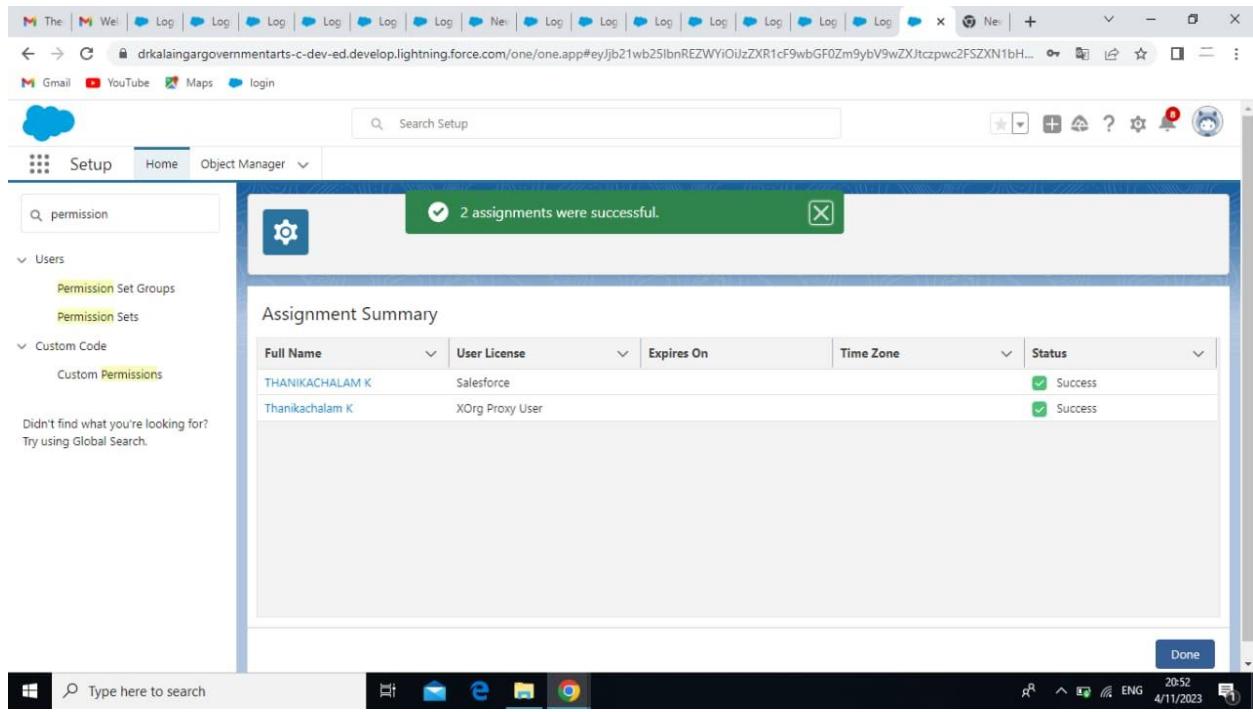
Description	API Name	Namespace Prefix	Created By
Buy	Buy		THANIKACHALAM K 11/04/2023, 3:09 pm

The 'Permission Set Overview' section includes fields for License, Session Activation Required, and Last Modified By. Below this, the 'Apps' section lists settings for Assigned Apps, Assigned Connected Apps, Object Settings, and App Permissions.

The screenshot shows the 'Manage Assignment Expiration' page for the 'Buy' permission set. The left sidebar has 'Permission Sets' selected. The main area displays a list of users assigned to the 'Buy' permission set:

Full Name	Title	Phone	Email
Thanikachalam K			thanikavpt20@gmail.com
THANIKACHALAM K			thanikavpt20@gmail.com

Two users are selected: 'Thanikachalam K' and 'THANIKACHALAM K'. The status bar at the bottom indicates the date as 4/11/2023 and the time as 15:10.



Milestone 9- Setup For OWD

Activity 1:

Create OWD Setting

The screenshot shows the Salesforce Sharing Settings page. At the top, there's a navigation bar with links like The, We, Ho, Lo, Tab, Ne, Tal, Tak, Ap, Ob, Ob, Ob, Bu, Ob, stu, Ho, Us, and a search bar labeled "Search Setup". Below the navigation bar is a header with a cloud icon and the text "Setup". The main content area has a title "Sharing Settings" with a "SETUP" icon. A sub-section title "Sharing Settings" is highlighted in yellow. A message says "Didn't find what you're looking for? Try using Global Search." Below this is a section titled "Default Sharing Settings" with a sub-section "Organization-Wide Defaults". A table lists sharing settings for various objects:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓

At the bottom of the page, there's a "Manage sharing settings for:" dropdown set to "All Objects" and a "Disable External Sharing Model" button. The status bar at the bottom right shows "15:19 4/11/2023".

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The page title is 'Sharing Settings' under the 'SETUP' tab. On the left, there's a sidebar with a search bar containing 'shar' and a 'Security' section. The main content area displays a table of sharing rules:

	Contact Point Email	Contact Point Phone	Contact Point Type Consent	Controlled by Parent	Controlled by Parent	✓
Contact Request	Public Read/Write	Private	Private	Controlled by Parent	Controlled by Parent	✓
Coupon	Private	Private	Private	Private	Private	✓
Credit Memo	Public Read/Write	Private	Private	Private	Private	✓
Customer	Private	Private	Private	Private	Private	✓
Data Use Legal Basis	Private	Private	Private	Private	Private	✓
Data Use Purpose	Private	Private	Private	Private	Private	✓
Engagement Channel Type	Private	Private	Private	Private	Private	✓
Finance Balance Snapshot	Private	Private	Private	Private	Private	✓
Finance Transaction	Private	Private	Private	Private	Private	✓

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The page title is 'Sharing Settings' under the 'SETUP' tab. On the left, there's a sidebar with a search bar containing 'shar' and a 'Security' section. The main content area displays a table of sharing rules and various settings:

Work Type Group	Public Read/Write	Private	✓
Buy	Private	Private	✓
field	Public Read/Write	Private	□
Loan	Private	Private	✓
Rent	Private	Private	✓

Below the table, there are sections for 'Other Settings' and a sidebar with a 'Secure' checkbox and other options.

Milestone 10-Report

Activity 1:

Create Report:

The screenshot shows the Salesforce Reports page. The left sidebar has sections for REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders), and FAVORITES. The main area displays a message: "Nothing here yet" with the sub-instruction "After you view a report, it appears here." A decorative illustration of a cactus and sun is visible. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, More, and a search bar.

The screenshot shows the Report Builder interface with the "Create Report" dialog open. On the left, a sidebar lists categories: Recently Used, All (Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns). The main area shows a search bar for "Select a Report Type" and a table of report types with columns for "Report Type Name" and "Category".

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard

The screenshot shows the Salesforce Report Builder interface. At the top, there are three tabs: 'Home | Salesforce', 'Report Builder | Salesforce', and a new tab. The address bar shows the URL: <https://drkalaingargovernmentarts-c-dev-ed.develop.lightning.force.com/one/one.app#/eyljbj21wb25lbnREZWYiOiyZXBvcnRzOnJlcG9ydEJ1aWxkZXiiLCJhdHRyaWJ1dGVzIj...>. The main navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. A search bar is at the top right.

The central area is titled 'Create Report'. On the left, a sidebar shows 'Category' sections: 'Recently Used' (Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns), 'All' (selected), and 'Report Type Name' (Accounts, Contacts & Accounts, Accounts with Partners, Account with Account Teams, Accounts with Contact Roles). A search bar for report types is also present.

The main content area displays a table with columns 'Report Type Name' and 'Category'. Each row has a dropdown menu icon next to the category column. To the right of the table is a 'Details' panel for 'Accounts' report type, which includes a 'Start Report' button, a 'Details' section (with 63 fields), and a 'Created By You' section stating 'No Reports Yet'.

The screenshot shows a Salesforce report interface. The top navigation bar includes links for Home, Sales, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. A search bar is at the top right. The main area displays a report titled "New Accounts Report" under the "Accounts" tab. The report table has columns for Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. The data shows 12 rows of account information, such as "THANIKACHALAM K" from GenePoint and "THANIKACHALAM K" from Edge Communications. The left sidebar contains sections for Fields (Outline, Filters), Groups (GROUP ROWS, Add group...), Columns (Add column...), and various filters for Last Activity, Account Owner, Account Name, Billing State/Province, Type, and Rating.

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	THANIKACHALAM K	GenePoint	CA	Customer - Channel	Cold	11/04/2023
2	-	THANIKACHALAM K	United Oil & Gas, UK	UK	Customer - Direct	-	11/04/2023
3	-	THANIKACHALAM K	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	11/04/2023
4	-	THANIKACHALAM K	Edge Communications	TX	Customer - Direct	Hot	11/04/2023
5	-	THANIKACHALAM K	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	11/04/2023
6	-	THANIKACHALAM K	Pyramid Construction Inc.	-	Customer - Channel	-	11/04/2023
7	-	THANIKACHALAM K	Dickenson plc	KS	Customer - Channel	-	11/04/2023
8	-	THANIKACHALAM K	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	11/04/2023
9	-	THANIKACHALAM K	Express Logistics and Transport	OR	Customer - Channel	Cold	11/04/2023
10	-	THANIKACHALAM K	University of Arizona	AZ	Customer - Direct	Warm	11/04/2023
11	-	THANIKACHALAM K	United Oil & Gas Corp.	NY	Customer - Direct	Hot	11/04/2023
12	-	THANIKACHALAM K	sForce	CA	-	-	11/04/2023

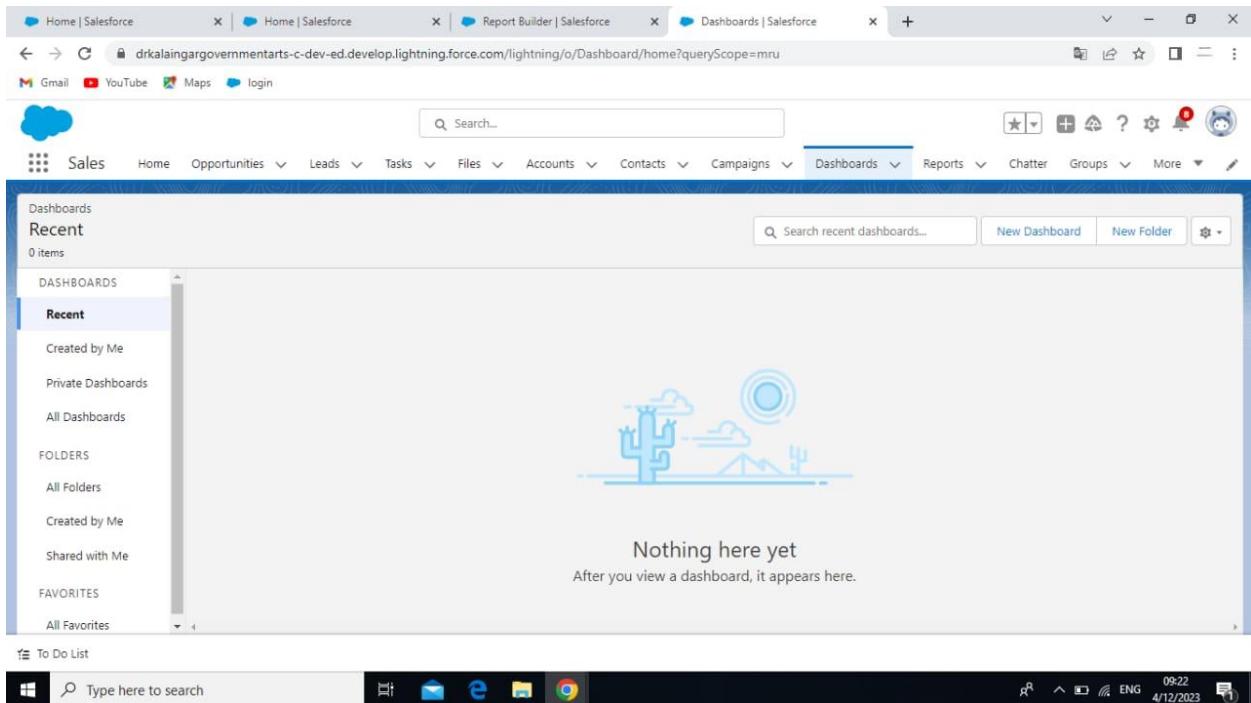
The screenshot shows the Salesforce Report Builder interface. A modal window titled "Save Report" is open, prompting the user to enter a report name. The input field contains "New Loans Report". Below the input field is a "Report Unique Name" section with a placeholder "(1)". At the bottom right of the modal are "Cancel" and "Save" buttons. The background shows the report configuration screen with sections for "Fields", "Groups", and "Columns". The "Groups" section includes a "GROUP ROWS" button and an "Add group..." button. The "Columns" section lists "Loan: Loan Name". The top navigation bar includes tabs for Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Reports, and More. The status bar at the bottom shows system information like battery level, signal strength, and date/time.

The screenshot shows the Salesforce Reports page. The left sidebar displays categories: "REPORTS", "Recent", "Created by Me", "Private Reports" (which is selected and highlighted in blue), "Public Reports", and "All Reports". Under "FOLDERS", there is a link to "All Folders". The main content area shows a table of "Private Reports" with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains three rows: "New Buyers Report" (Description: Private Reports, Folder: Private Reports, Created By: THANIKACHALAM K, Created On: 12/4/2023, 10:22 am), "New Loans Report" (Description: Private Reports, Folder: Private Reports, Created By: THANIKACHALAM K, Created On: 12/4/2023, 10:24 am), and "New Rents Report" (Description: Private Reports, Folder: Private Reports, Created By: THANIKACHALAM K, Created On: 12/4/2023, 10:23 am). The top navigation bar includes tabs for Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Reports, and More. The status bar at the bottom shows system information like battery level, signal strength, and date/time.

Milestone 11- Dashboards:

Activity 1:

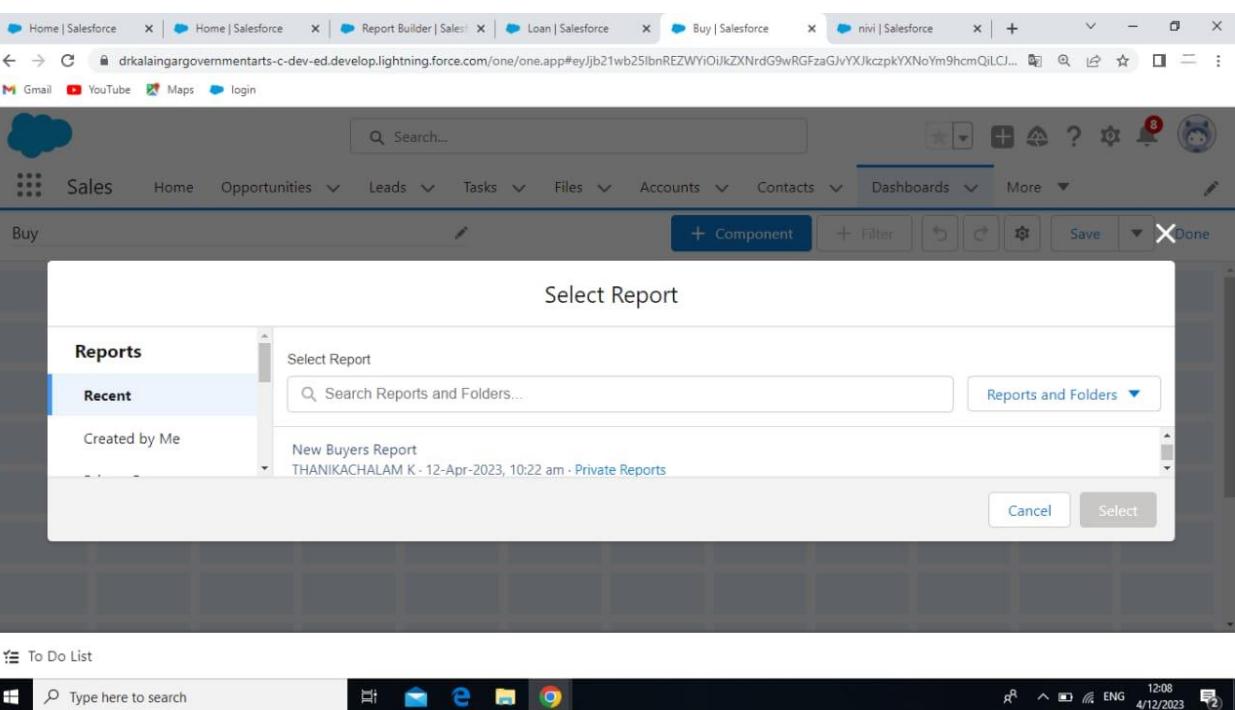
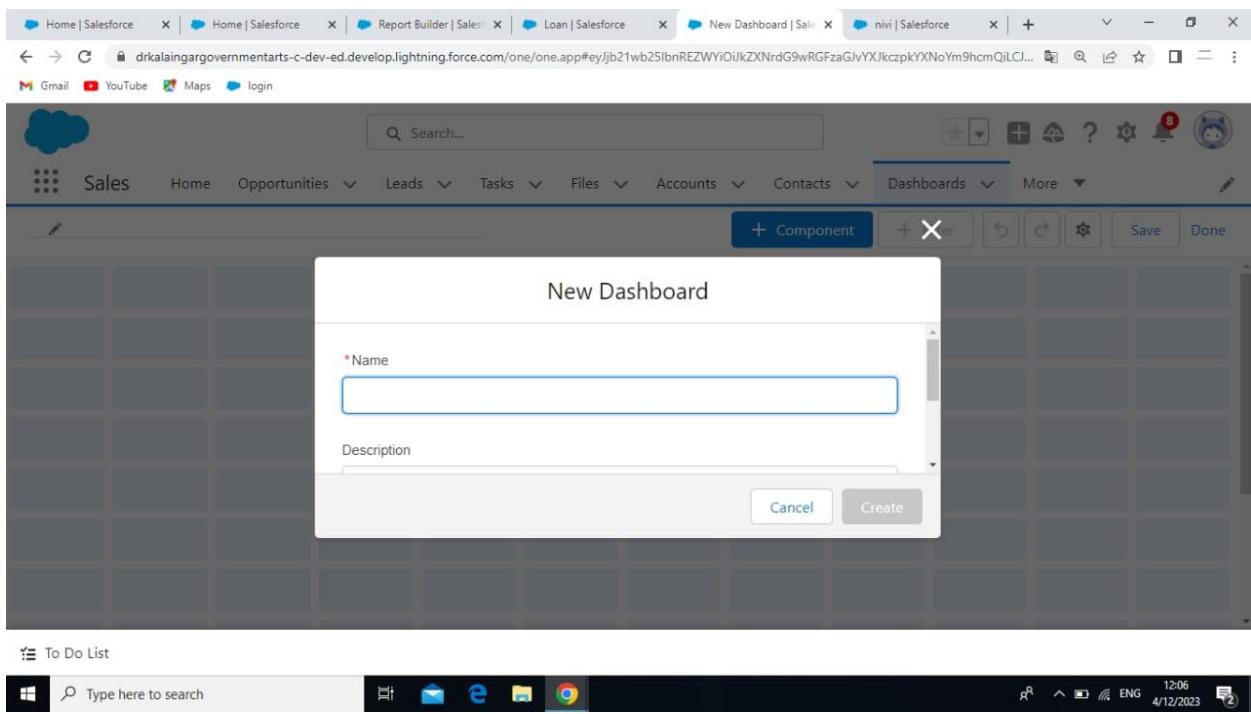
Create dashboards:

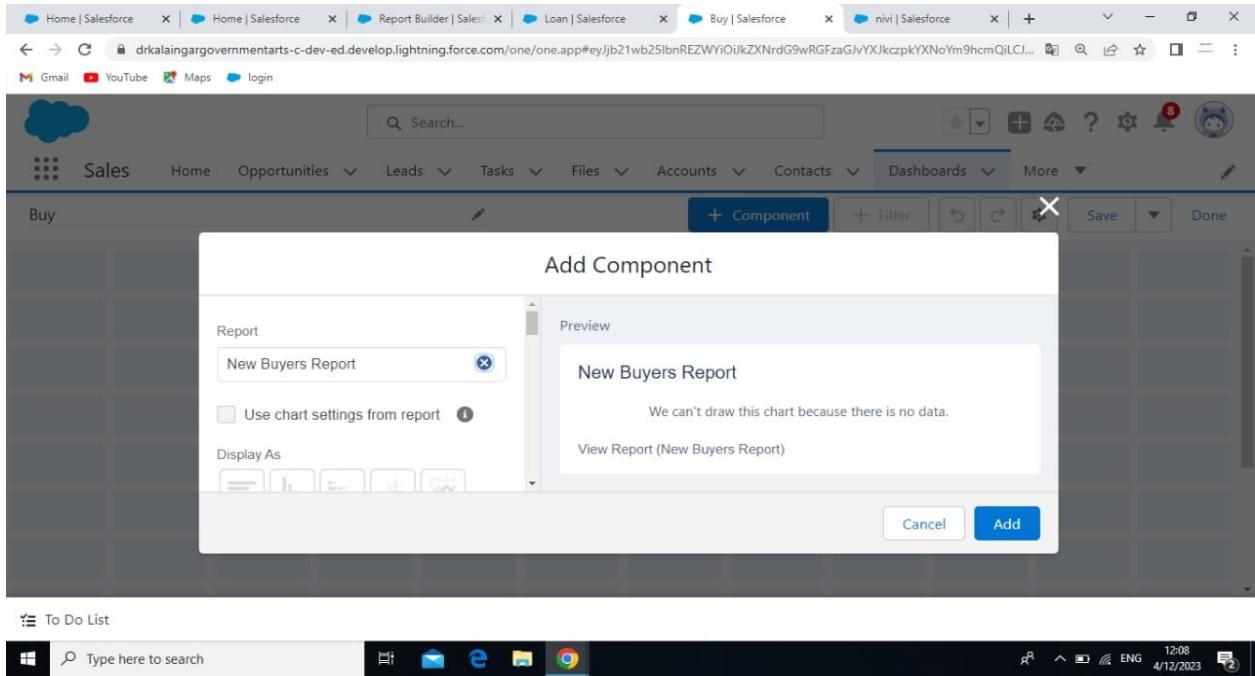


The screenshot shows the Salesforce Lightning Home page. The top navigation bar includes links for Home | Salesforce, Report Builder | Salesforce, Loan Amount | Salesforce, and Dashboards | Salesforce. Below the navigation is a search bar with placeholder text "Search...". The main content area is titled "Dashboards" and "Recent". On the left, there's a sidebar with sections for Dashboards (Recent, Created by Me, Private Dashboards, All Dashboards), Folders (All Folders), and a "Created by Me" section. The main table lists three dashboards: "Loan Amount" (Description: "Loan amount", Folder: "Loan", Created By: THANIKACHALAM K, Created On: 12/4/2023, 9:40 am), "Thanikachalam" (Description: "Loan amount", Folder: "Loan", Created By: THANIKACHALAM K, Created On: 12/4/2023, 9:46 am), and "Loan" (Description: "Private Dashboards", Folder: "Private Dashboards", Created By: THANIKACHALAM K, Created On: 12/4/2023, 9:35 am). The bottom of the page features a "To Do List" section and a taskbar with icons for File Explorer, Mail, Edge, File, and Google Chrome.

Dashboards	Description	Folder	Created By	Created On	Subscribed
Recent	Loan Amount	Loan amount	THANIKACHALAM K	12/4/2023, 9:40 am	
Created by Me	Thanikachalam	Loan amount	THANIKACHALAM K	12/4/2023, 9:46 am	
Private Dashboards	Loan	Private Dashboards	THANIKACHALAM K	12/4/2023, 9:35 am	

The screenshot shows the Salesforce Lightning Experience interface. At the top, there are five tabs: "Home | Salesforce", "Report Builder | Salesforce", "Loan Amount | Salesforce", and two others partially visible. Below the tabs is a navigation bar with links to "Gmail", "YouTube", "Maps", and "login". The main header features a blue cloud icon, the word "Sales", and a search bar with the placeholder "Search...". A horizontal menu bar includes "Home", "Opportunities", "Leads", "Tasks", "Files", "Accounts", "Contacts", "Campaigns", "Dashboards", "Reports", "Chatter", "Groups", and "More". The current view is the "Loan Amount" dashboard, which displays a large grid of empty rows and columns. On the right side of the dashboard, there are several action buttons: "+ Component", "+ Filter", a gear icon, a save icon, and a "Done" button. At the bottom left, there is a "To Do List" icon. The bottom of the screen shows the Windows taskbar with icons for File Explorer, Mail, Edge, and Google Chrome, along with a search bar and system status indicators.





Trailhead Profile Public URL

Team Leader – <https://trailblazer.me/id/a06c38413f8065a69507491fc8cb53217>

Team Member 1 - <https://trailblazer.me/id/m32ca9352534e1a99a7e48c16b347891a>

Team Member 2 - <https://trailblazer.me/id/bb15684d6aa9cae8a154a9c0a84b419e>

Team Member 3 - <https://trailblazer.me/id/b59cce97ffeed3bd614d0ef555f559b>

Team Member 4 - <https://trailblazer.me/id/e4386367cf1276b85b417a7e64e94fb>

ADVANTAGES & DISADVANTAGE

ADVANTAGES:

- ❖ Complete customization
- ❖ Comprehensive data management

- ❖ **Integration with other applications**
- ❖ **Automating processes**

DISADVANTAGES

- ❖ **Steep learning curve**
- ❖ **Expensive**
- ❖ **Outdated user interface**
- ❖ **Requires technical expertise**

APPLICATIONS

A property management application using Salesforce can be customized to fit your specific needs. Here are some features that can be included:

➤ **Tenant Management:**

You can store all tenant information, include lease agreements, rent payment history., contact information, critical dates, and more.

➤ **Maintenance Requests:**

Tenants can log maintenance requests directly into the application, and the property management team can track progress on these requests.

➤ **Online Rent Payment:**

Set up automated rent payment reminders and allow tenants to make rent payments online through the application.

➤ **Property Listings:**

List available property through the application, with relevant details like location, rent,, property features and photos.

➤ **Mobile Access:**

Property managers and tenants can securely access the application from a mobile device.

CONCLUSION

In conclusion, a property management application using Salesforce can be an excellent investment for property managers who want to streamline and automate their workflows. Through the use of customized features such as tenant management, maintenance requests, online rent payments, property listings, accounting integration, data analytics, and mobile access, the application can help to improve efficiency, accuracy, and tenant satisfaction.

FUTURE SCOPE

A property management application built on the Salesforce platform can provide numerous benefits and opportunities for future growth. Here are some of the potential future scopes for a property management application using Salesforce:

- **Scalability:**

Salesforce is a highly scalable platform that can easily handle large volumes of data and users. As your property management application grows, you can easily scale up your Salesforce infrastructure to accommodate the increased workload.

- **Integration:**

Salesforce offers a wide range of APIs and integration options, allowing you to seamlessly integrate your property management application with other business systems and applications.

- **Customization:**

Salesforce provides extensive customization options, allowing you to tailor your property management application to your specific business requirements.

- **Analytics:**

Salesforce provides robust analytics and reporting capabilities, allowing you to gain insights into your property management operations and make data-driven decisions.

- **Custom Relationship Management:**

Salesforce is a leading CRM platform, and incorporating CRM features into your property management application can improve customer engagement and satisfaction.