

Project name:
Property Management Application Using Salesforce

TEAM MEAD

TEAM MEMBER

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PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

INTRODUCTION

Overview

Develop an App for 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 upto 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.

Purpose

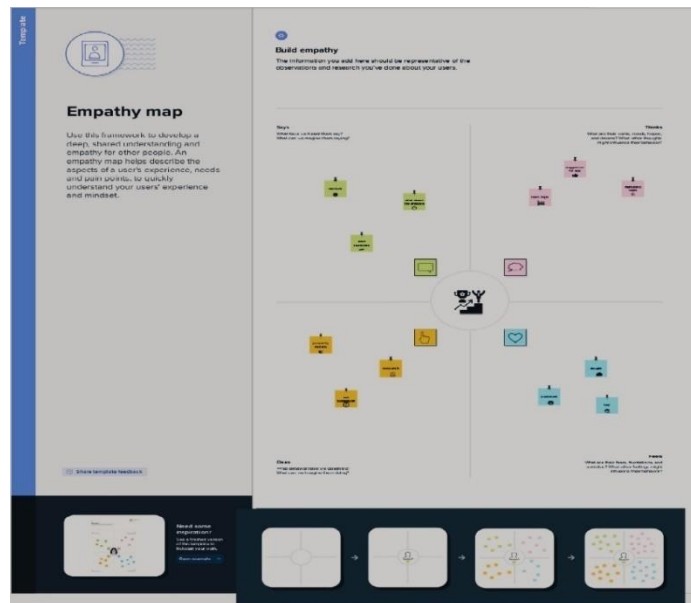
Salesforce is our customer success platform designed to help us sell, service, market, analyze, and connect with our customers using salesforce.

WE LEARN ABOUT

- 1.Real time salesforce project
- 2.Object & Relationship in salesforce

ProblemDefinition& DesignThinking

EmpathyMap



Ideation&BrainstormingMap



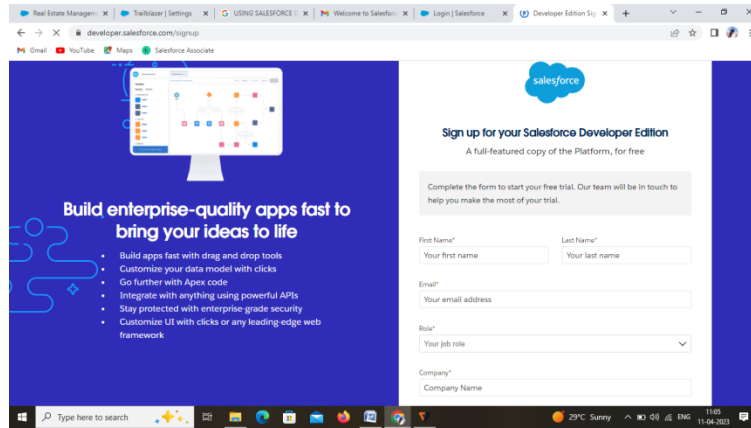
1 RESULT

DataModel:

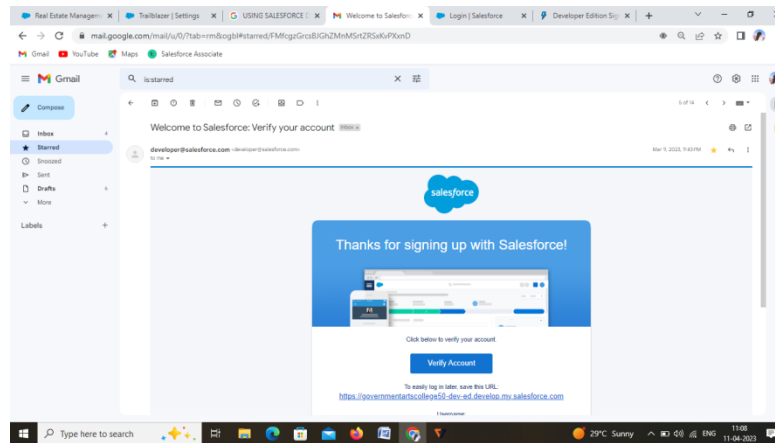
Objectname	Fields in the Object	
Lead		
	Field lable	Lead -{0000}
	State	Picklist (Maharashtra)
	City	Mumbai
	Email	Email
	Phone	Phone
Buy	Field lable	Buy
	Property type	Residential
	Discount	Percentage
	State	Picklist(Gujarat)
	City	Any City
	Annual Amount	Paid
Rent	Field lable	Rent-{0000}
	Rental city	Any city
	BHK type	Picklist (1BHK,2BHK,3BHK)
Loan	Loan Id	LN-{0000}
	Interst Rate	Currency
	Term	Number
	Annual Loan	Field data type
	Total loan instalments	Create field data type
	Loan repayment	Create field data type
	Loan amount	Formula

Activity&Screenshot

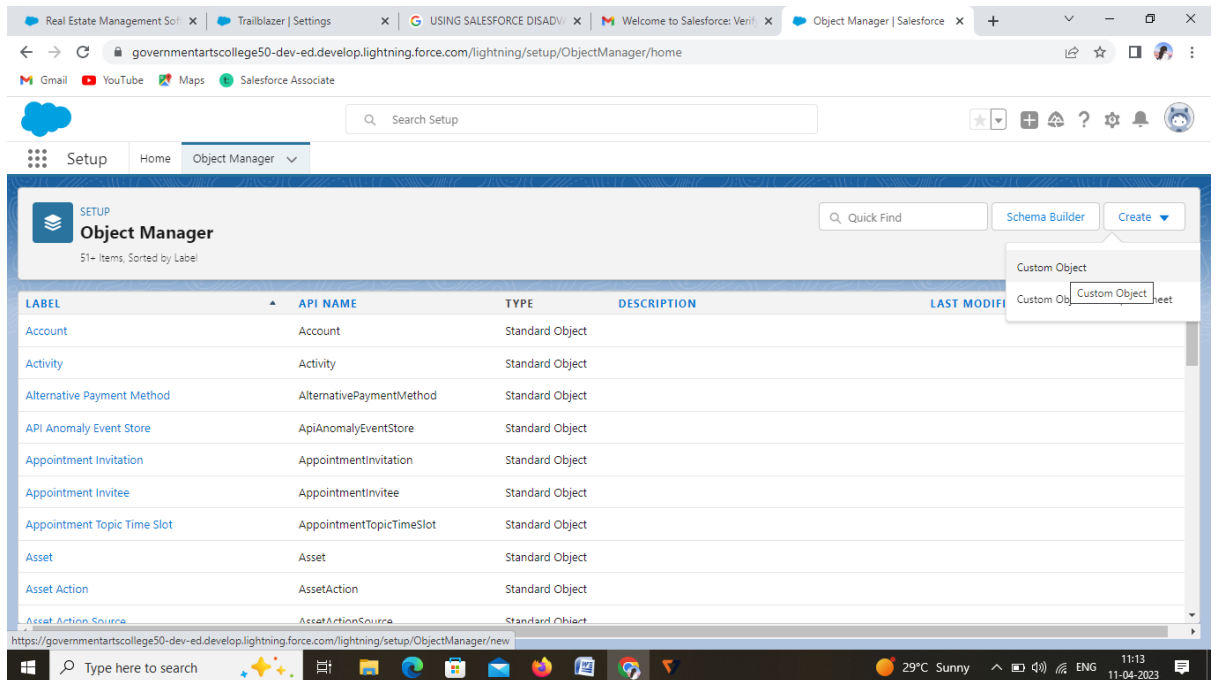
Milestone-1 (Activity-1)



Activity -2



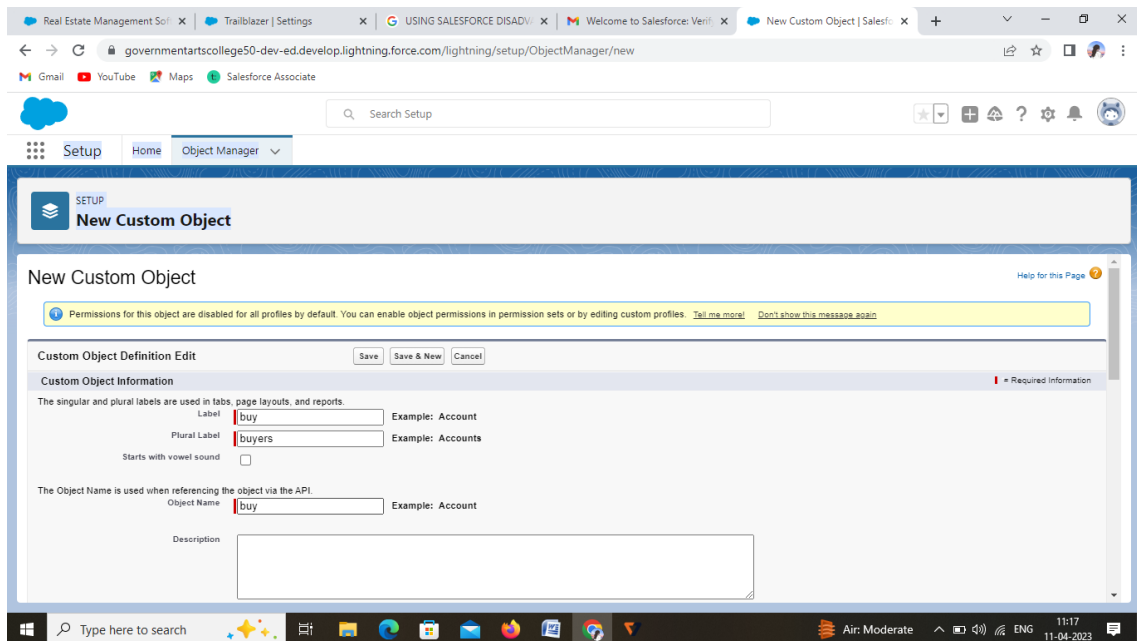
Milestone-2 (Activity-1)



The screenshot shows the Salesforce Object Manager interface. The browser tabs include 'Real Estate Management So...', 'Trailblazer | Settings', 'USING SALESFORCE DISADV...', 'Welcome to Salesforce: Veri...', and 'Object Manager | Salesforce'. The address bar shows the URL 'governmentartscollege50-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home'. The page header includes a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area displays a table of standard objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		

A 'Create' button is visible in the top right corner, with a dropdown menu showing 'Custom Object' and 'Custom Object'.



The screenshot shows the 'New Custom Object' setup page in Salesforce. The browser tabs include 'Real Estate Management So...', 'Trailblazer | Settings', 'USING SALESFORCE DISADV...', 'Welcome to Salesforce: Veri...', and 'New Custom Object | Salesf...'. The address bar shows the URL 'governmentartscollege50-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new'. The page header includes a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'New Custom Object' form:

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information * Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

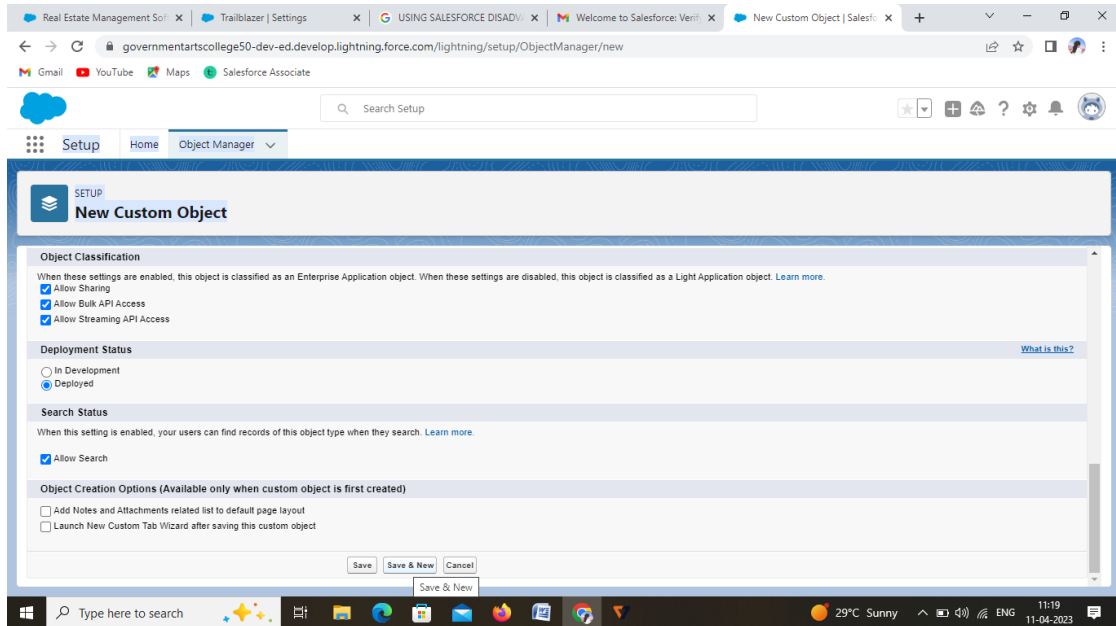
Plural Label: Example: Accounts

Starts with vowel sound: ☐

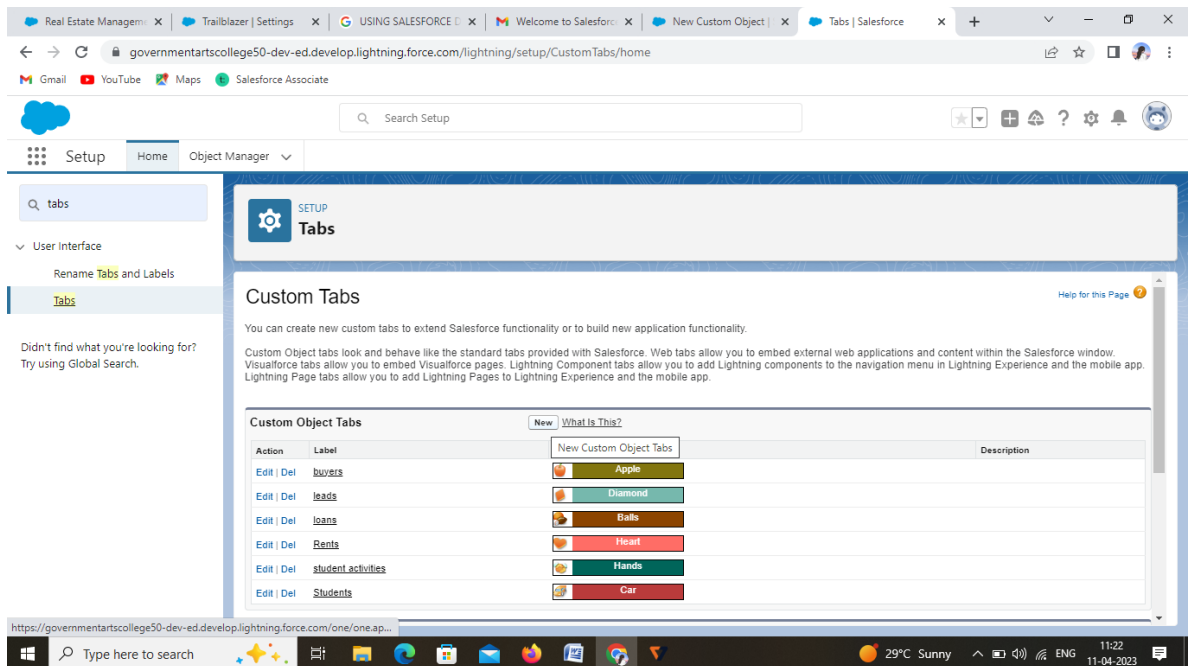
The Object Name is used when referencing the object via the API.

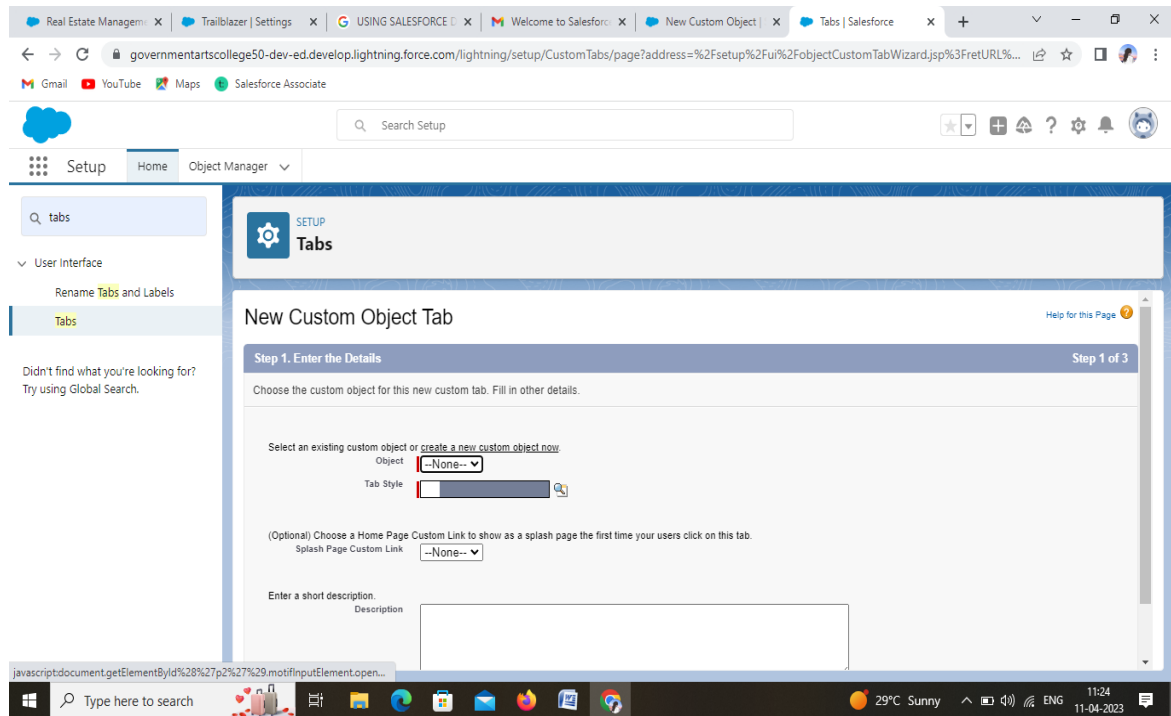
Object Name: Example: Account

Description:

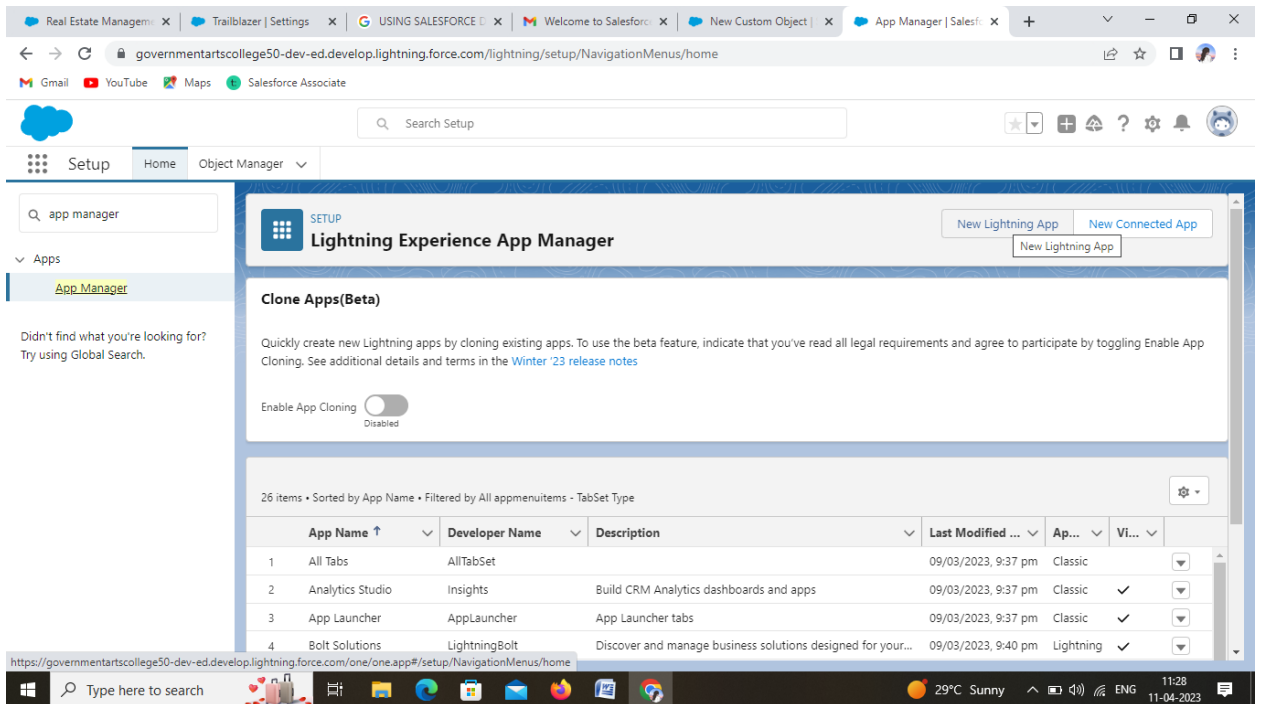


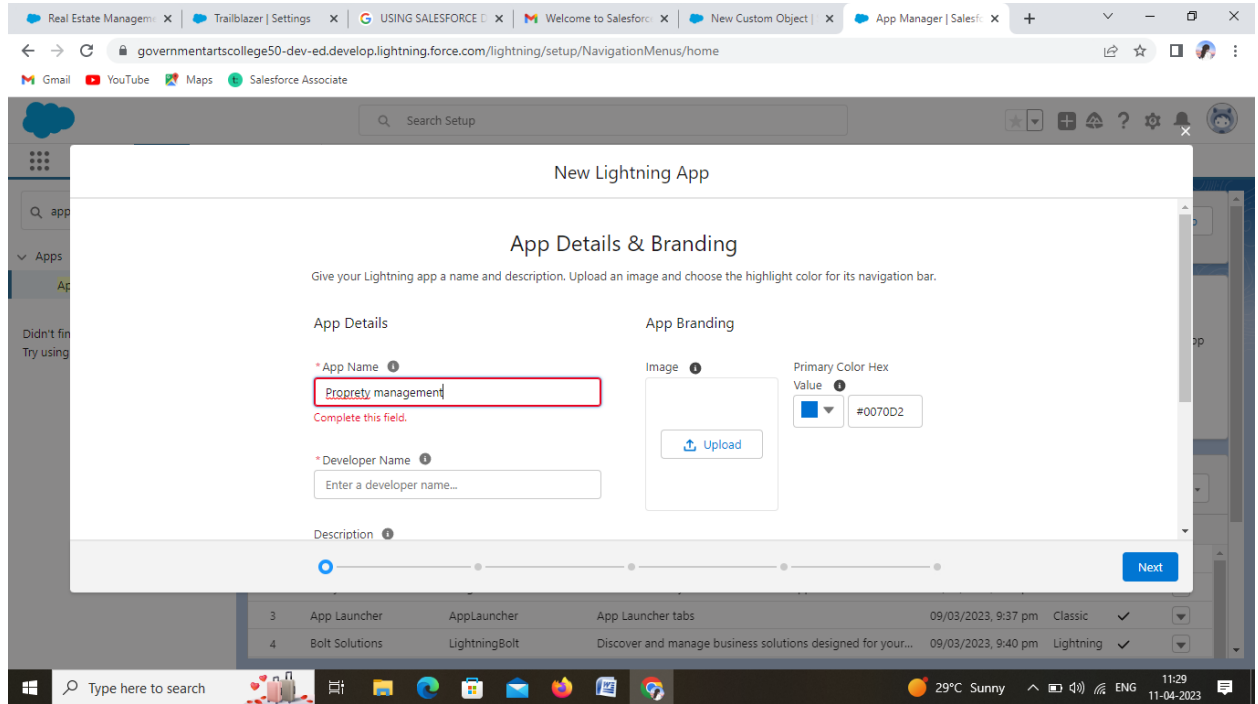
Milestone-3 Tab Activity-1



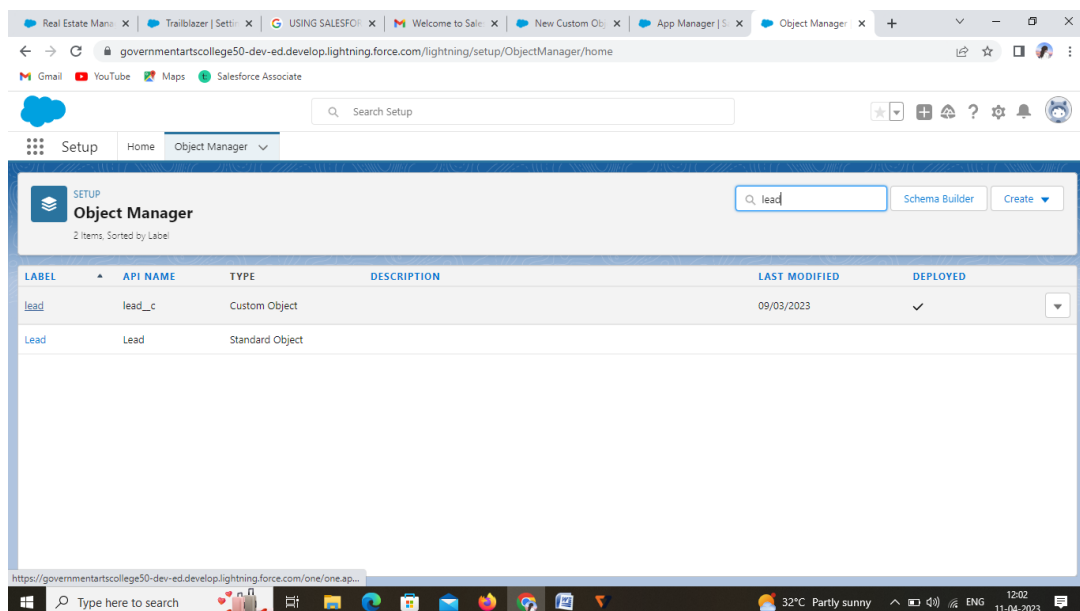


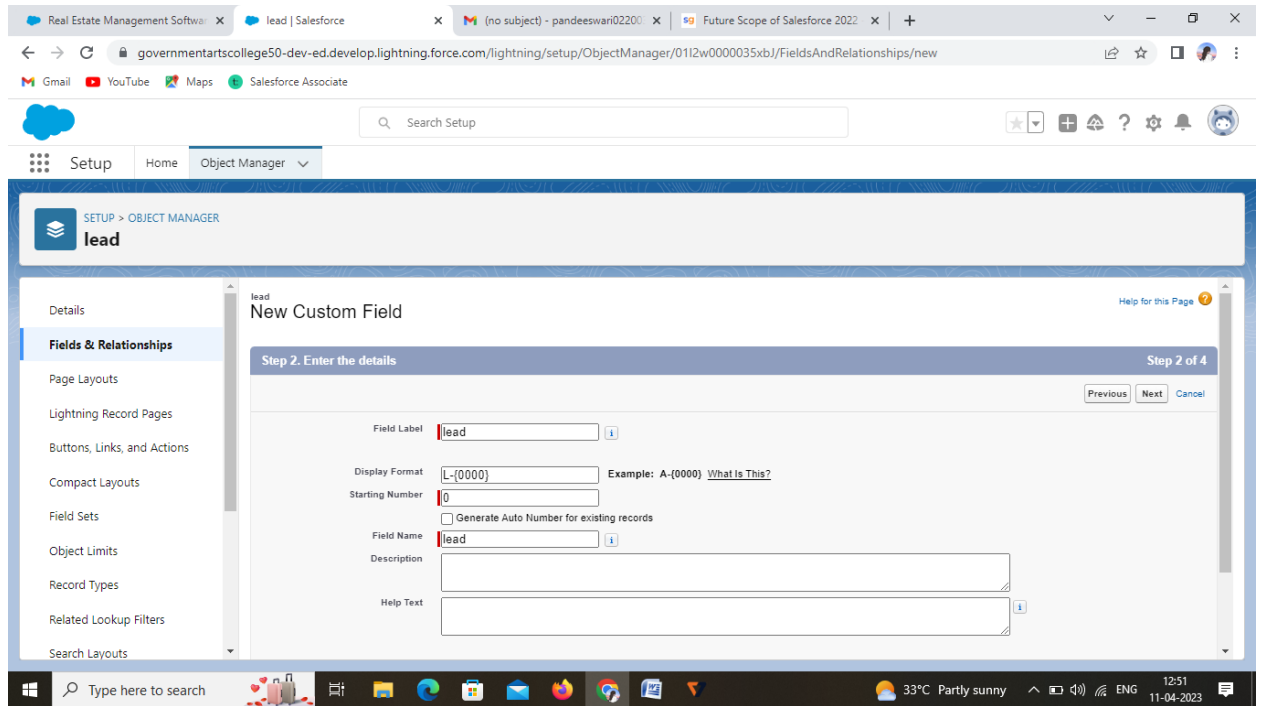
Milestone-4 The Lightning App Activity-1





Milestone-5 Fields





Real Estate Management Software | lead | Salesforce | (no subject) - pandeeswari02200 | Future Scope of Salesforce 2022

governmentartscollege50-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i2w0000035xbJ/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

lead

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

New Custom Field

Step 2. Enter the details

Step 2 of 4

Field Label: lead

Display Format: L-0000 Example: A-0000 What Is This?

Starting Number: 0

☐ Generate Auto Number for existing records

Field Name: lead

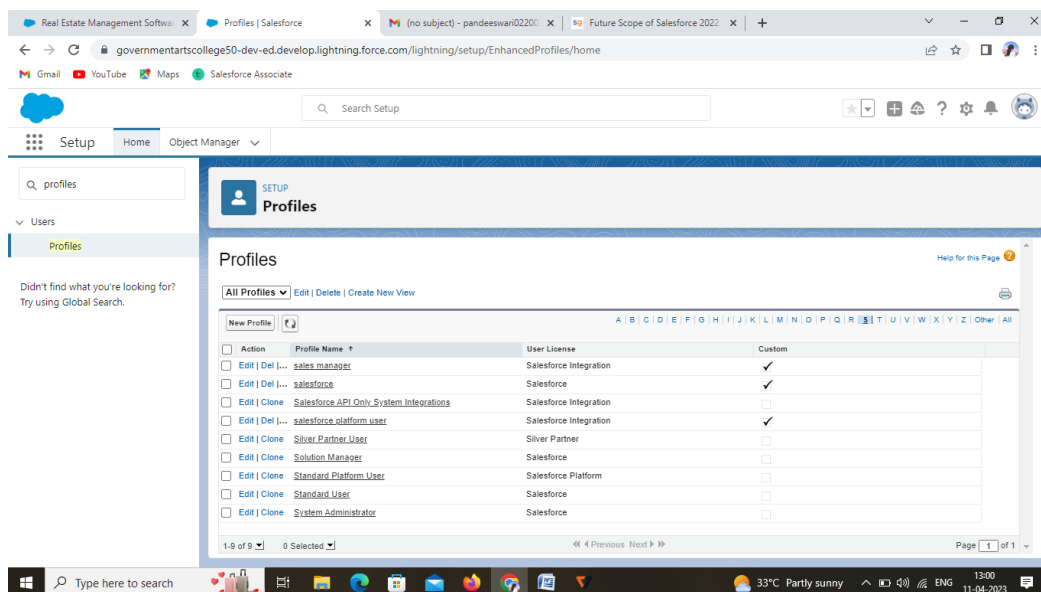
Description:

Help Text:

Type here to search

33°C Partly sunny 11-04-2023 12:51

Milestone-6 Profile



Real Estate Management Software | Profiles | Salesforce | (no subject) - pandeeswari02200 | Future Scope of Salesforce 2022

governmentartscollege50-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

Profiles

Profiles

All Profiles Edit Delete Create New View

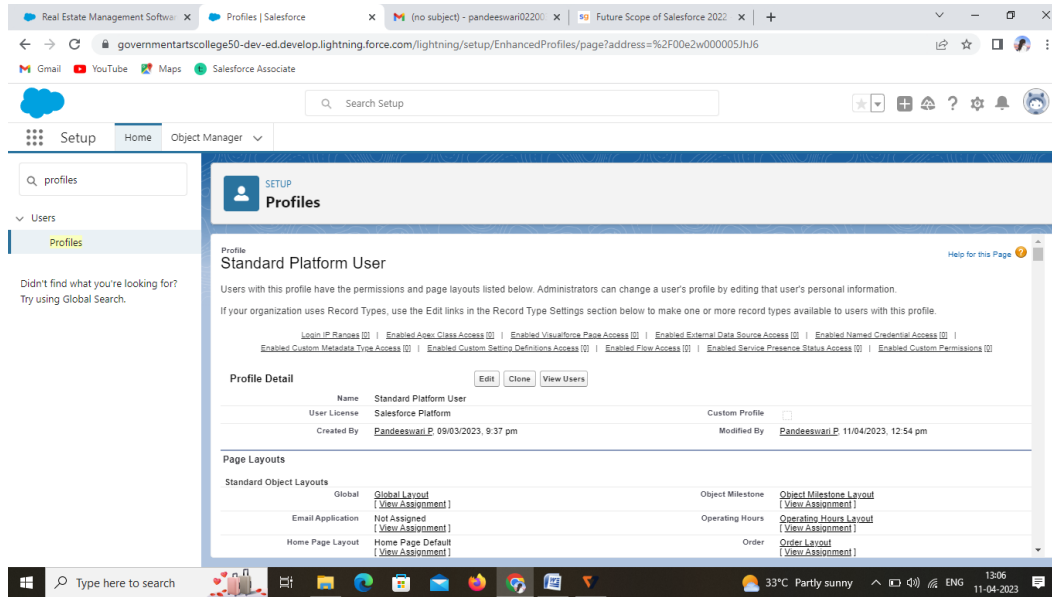
Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	sales manager	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	salesforce	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	salesforce platform user	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-9 of 9 0 Selected

Page 1 of 1

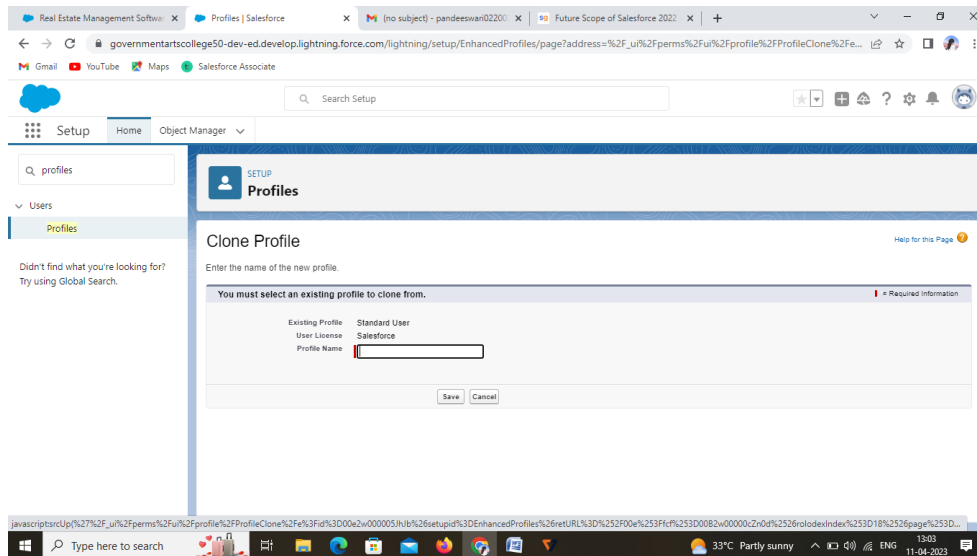
Type here to search

33°C Partly sunny 11-04-2023 13:00



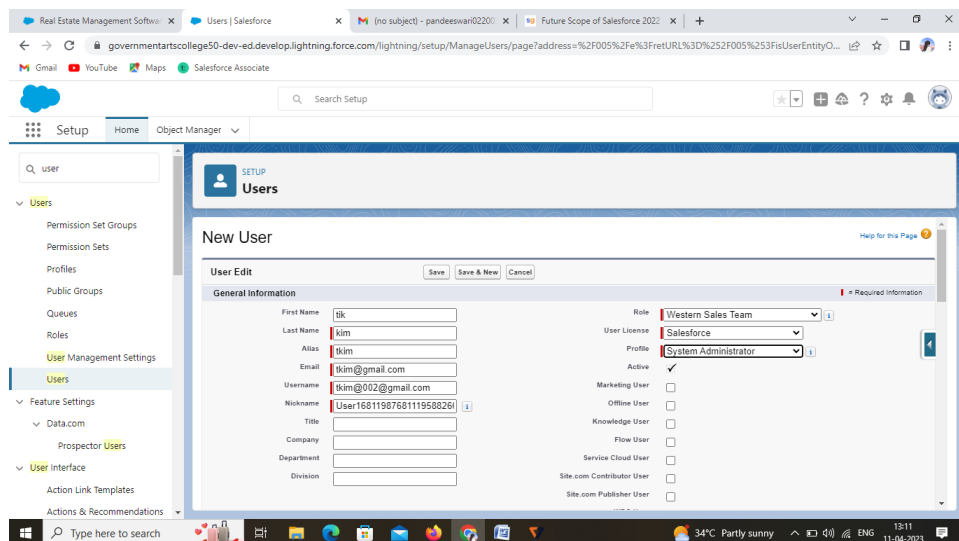
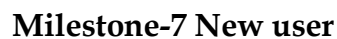
The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar and a list of items including 'Users' and 'Profiles'. The main content area displays the 'Standard Platform User' profile. It includes a 'Profile Detail' section with fields for Name, User License, Created By, and Modified By. Below this is a 'Page Layouts' section with a table listing various layouts and their assignments.

Page Layouts	
Standard Object Layouts	Global: Global Layout (View Assignment)
Email Application	Not Assigned (View Assignment)
Home Page Layout	Home Page Default (View Assignment)
Object Milestone	Object Milestone Layout (View Assignment)
Operating Hours	Operating Hours Layout (View Assignment)
Order	Order Layout (View Assignment)

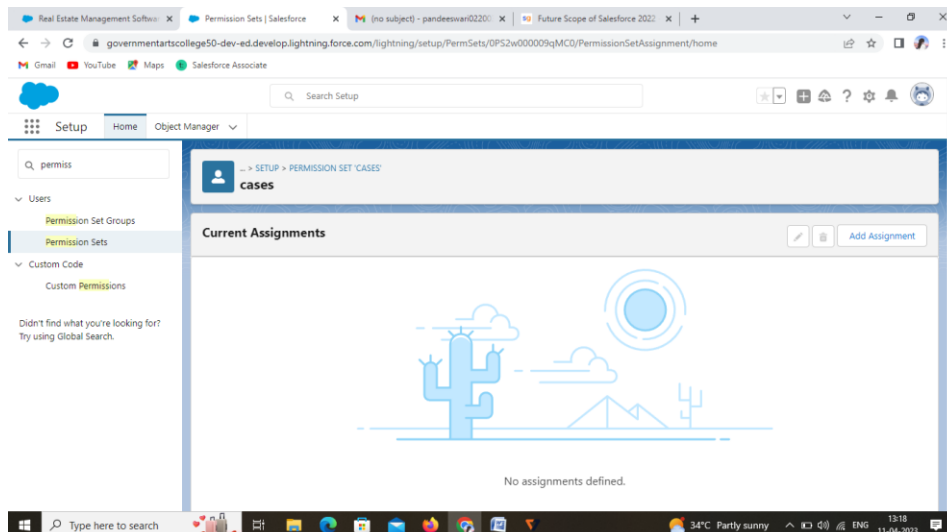
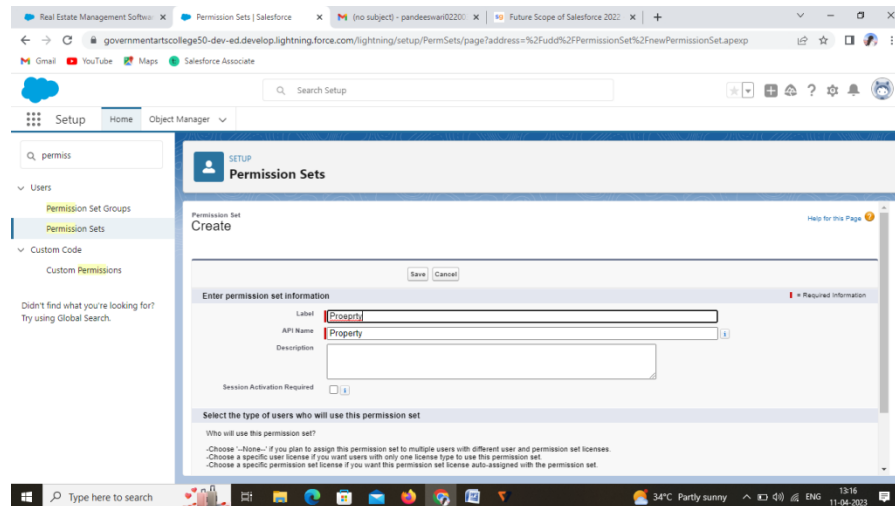
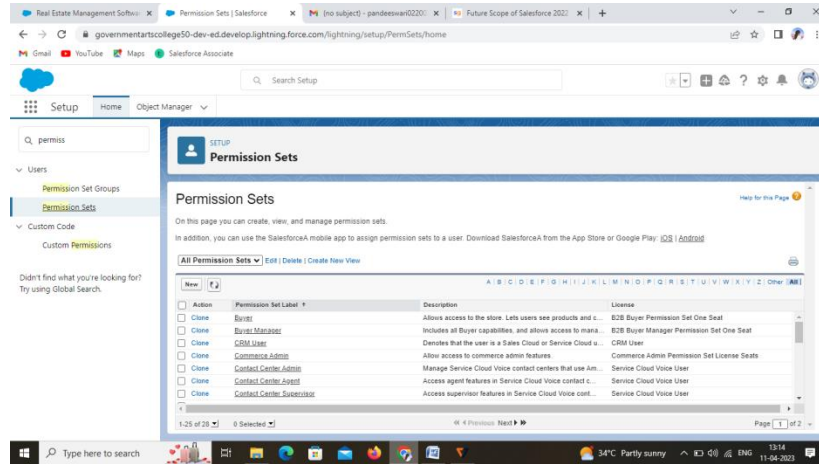


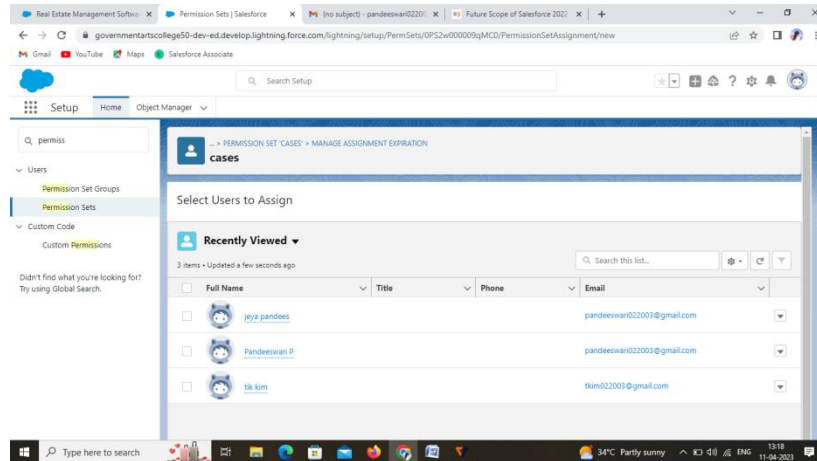
The screenshot shows the Salesforce Setup interface for the 'Clone Profile' section. The left sidebar is identical to the previous screenshot. The main content area displays the 'Clone Profile' form. It includes a 'You must select an existing profile to clone from.' message and a table with fields for Existing Profile, User License, and Profile Name. The 'Profile Name' field is currently empty.

Clone Profile	
Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text"/>

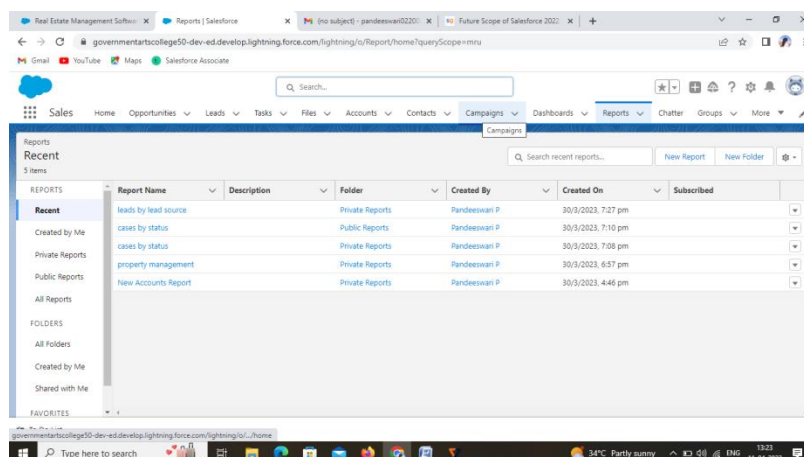
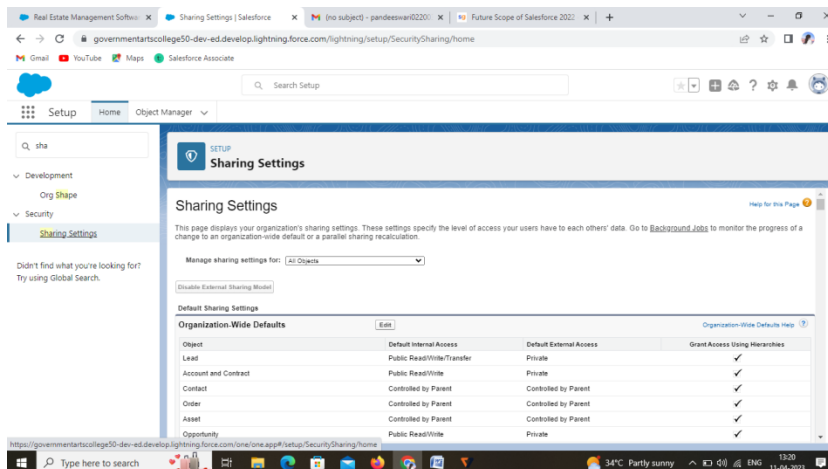


Milestone8 – Permission Set

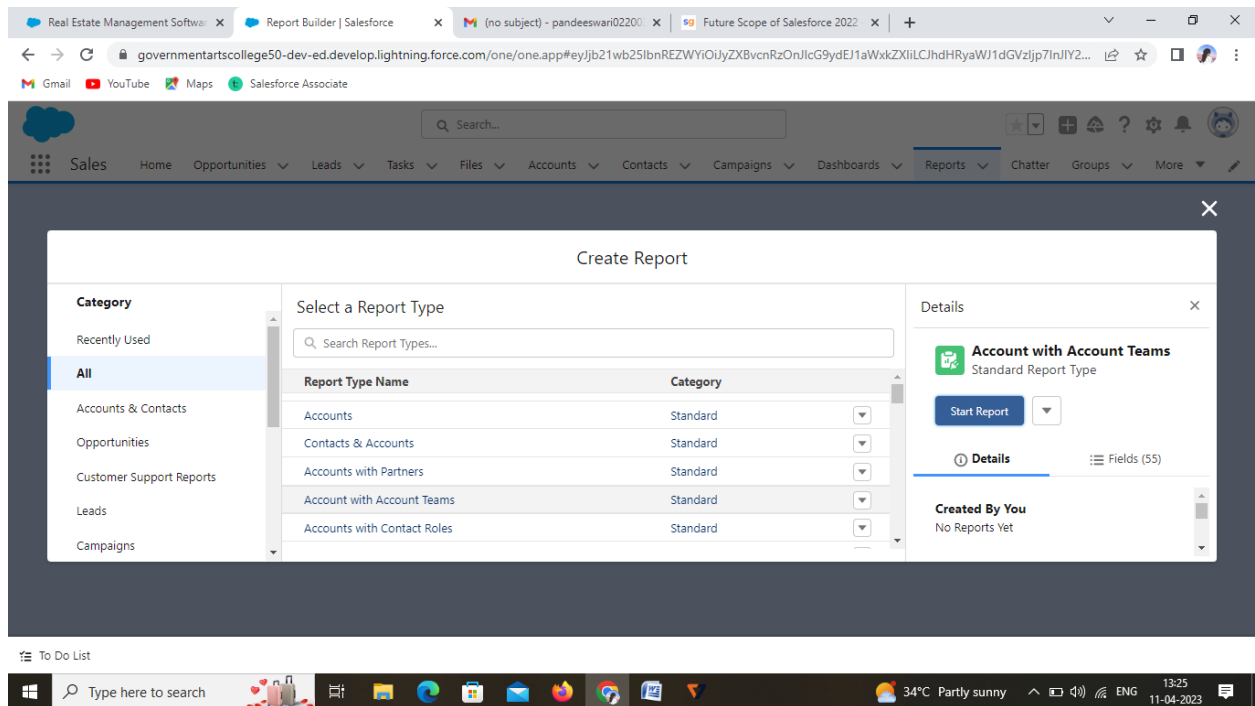




Milestone9- Setup for OWD



Milestone 10-Report



Create Report

Category

- Recently Used
- All**
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns

Select a Report Type

Search Report Types...

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

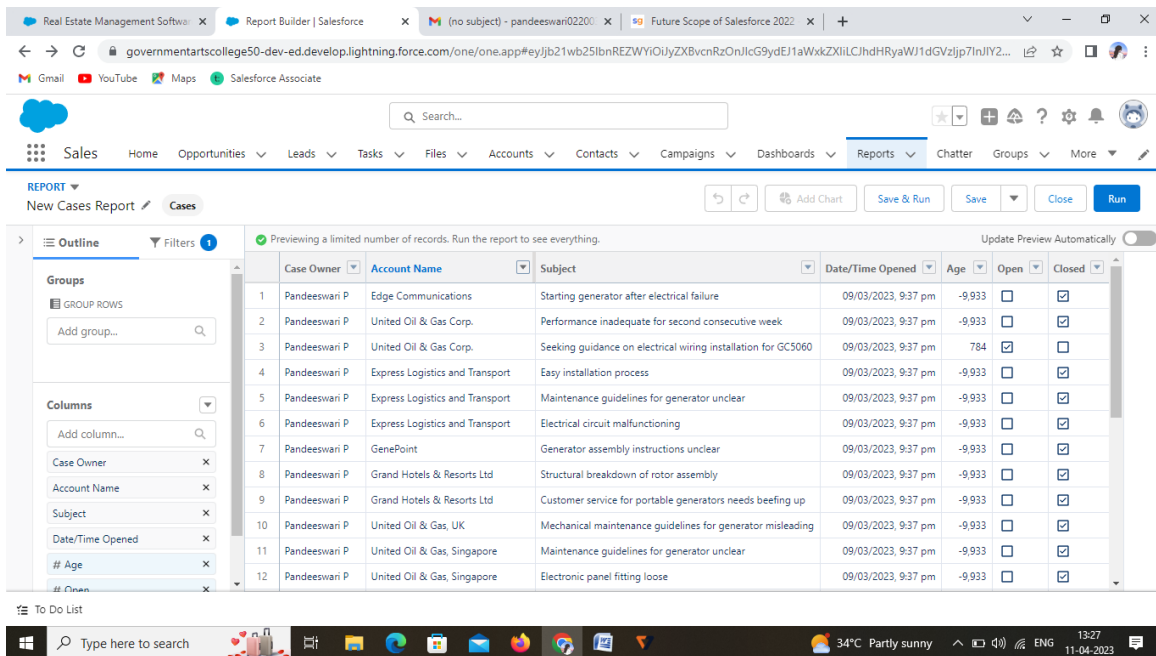
Details

Account with Account Teams
Standard Report Type

Start Report

Details Fields (55)

Created By You
No Reports Yet



REPORT

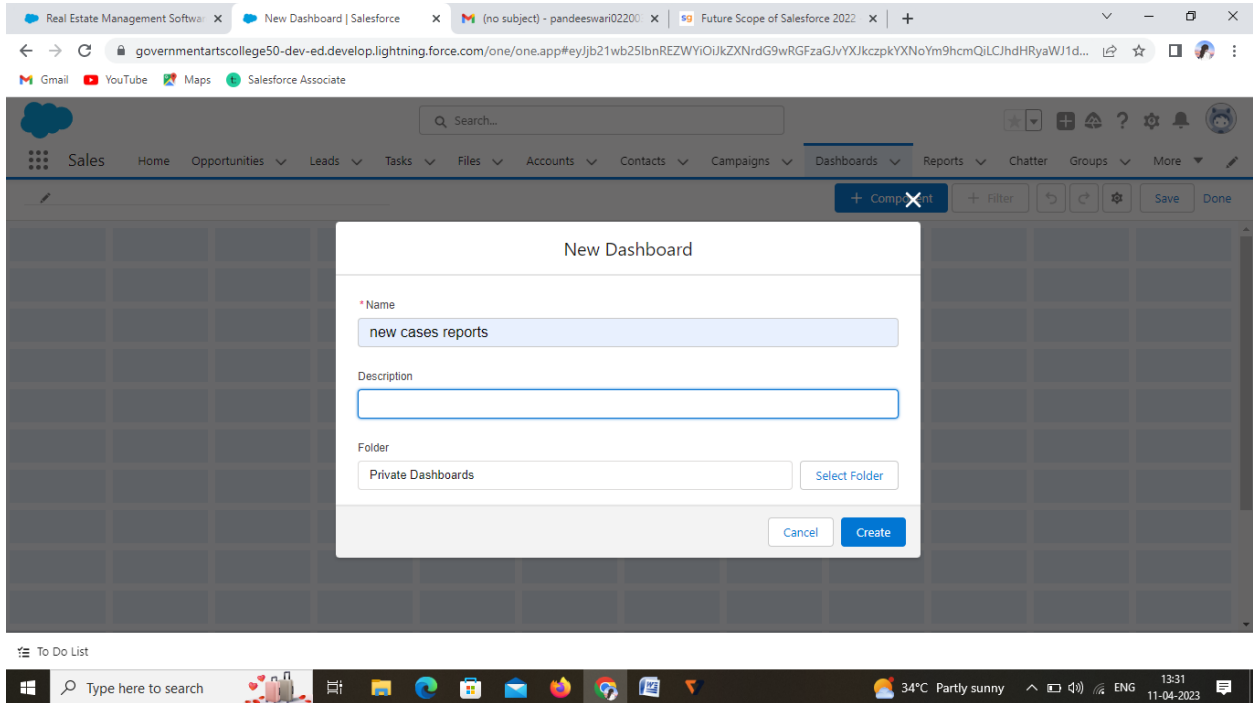
New Cases Report Cases

Outline Filters 1

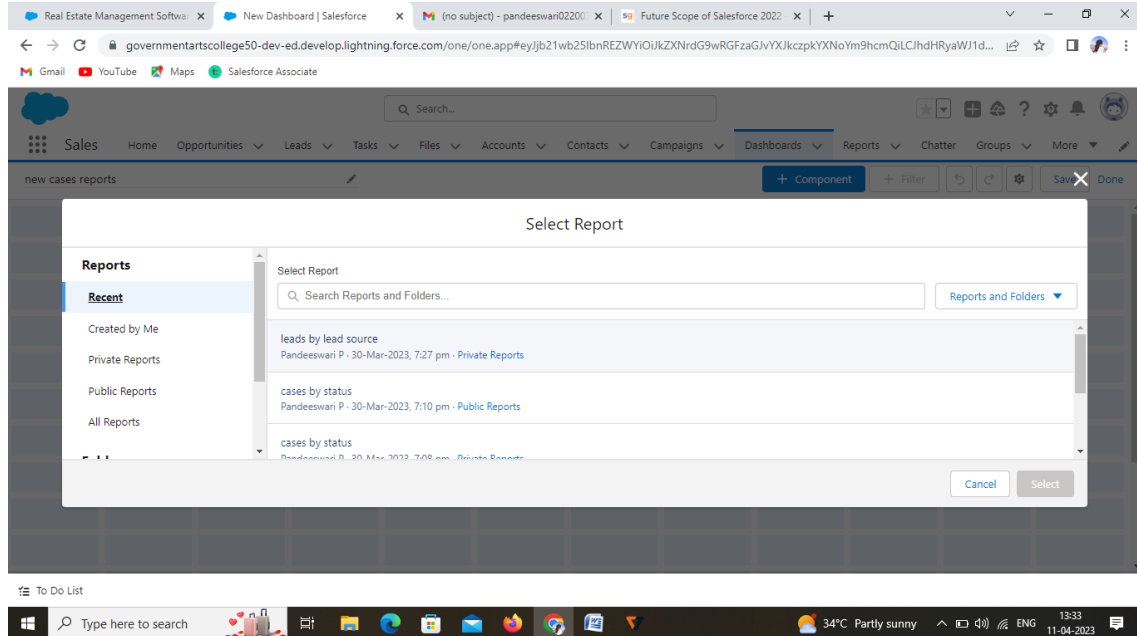
Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

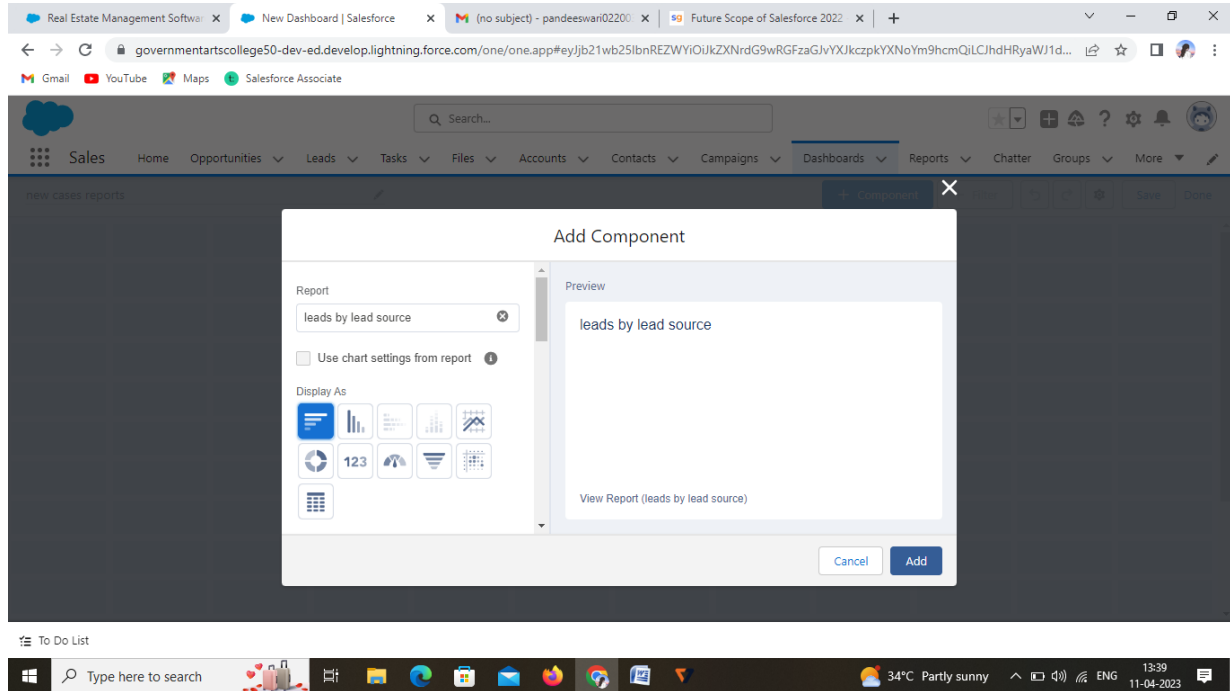
Case Owner	Account Name	Subject	Date/Time Opened	Age	Open	Closed
Pandeewari P	Edge Communications	Starting generator after electrical failure	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pandeewari P	United Oil & Gas Corp.	Performance inadequate for second consecutive week	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pandeewari P	United Oil & Gas Corp.	Seeking guidance on electrical wiring installation for GC5060	09/03/2023, 9:37 pm	784	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pandeewari P	Express Logistics and Transport	Easy installation process	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pandeewari P	Express Logistics and Transport	Maintenance guidelines for generator unclear	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pandeewari P	Express Logistics and Transport	Electrical circuit malfunctioning	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pandeewari P	GenePoint	Generator assembly instructions unclear	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pandeewari P	Grand Hotels & Resorts Ltd	Structural breakdown of rotor assembly	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pandeewari P	Grand Hotels & Resorts Ltd	Customer service for portable generators needs beefing up	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pandeewari P	United Oil & Gas, UK	Mechanical maintenance guidelines for generator misleading	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pandeewari P	United Oil & Gas, Singapore	Maintenance guidelines for generator unclear	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pandeewari P	United Oil & Gas, Singapore	Electronic panel fitting loose	09/03/2023, 9:37 pm	-9.933	<input type="checkbox"/>	<input checked="" type="checkbox"/>



The screenshot shows a web browser window with multiple tabs. The active tab is 'New Dashboard | Salesforce'. The address bar shows a URL from 'governmentartscollege50-dev-ed.develop.lightning.force.com'. The Salesforce interface is visible, with a navigation bar at the top. A 'New Dashboard' dialog box is open in the center. It has a title bar 'New Dashboard' and three input fields: 'Name' (containing 'new cases reports'), 'Description' (empty), and 'Folder' (set to 'Private Dashboards'). There are 'Cancel' and 'Create' buttons at the bottom right of the dialog box. The background shows a grid of dashboard components.



The screenshot shows the same Salesforce interface as the previous one, but now the 'Select Report' dialog box is open. The dialog box has a title bar 'Select Report' and a search bar 'Search Reports and Folders...'. On the left side, there is a 'Reports' sidebar with 'Recent' selected. The main area lists three reports: 'leads by lead source' (created by Pandeeswari P. on 30-Mar-2023 at 7:27 pm, Private Reports), 'cases by status' (created by Pandeeswari P. on 30-Mar-2023 at 7:10 pm, Public Reports), and another 'cases by status' report (created by Pandeeswari P. on 30-Mar-2023 at 7:08 am, Private Reports). There are 'Cancel' and 'Select' buttons at the bottom right of the dialog box. The background shows the 'new cases reports' dashboard.



TrailheadProfilePublicURL

Team Lead – P.Pandeeswari

<https://trailblazer.me/id/pandeeswari2>

TeamMember1– M.Vindhiya

<https://trailblazer.me/id/vindhiya>

TeamMember2- A.Sulthanaparveen

<https://trailblazer.me/id/sulthana>

Team Member 3- B.Deepika

<https://trailblazer.me/id/deepika32>

5. ADVANTAGES & DISADVANTAGES

ADVANTAGES

I. **Real estate management software should be fully cloud-based.**

Not too long ago, *where* property managers kept their digital data wasn't really an issue. Work was done on in-house computer systems, and so every important piece of information was maintained on those same systems. But with the advent and proliferation of the internet, data became much more mobile – information could be sent and accessed remotely for improved data convenience. Even so, data was still generally kept onsite. Cloud technology has changed all of that.

standard internet browser, you can log into an encrypted real estate management system and get direct access to real-time customer and business data, any time, and from anywhere.

Cloud-based systems offer other With cloud-based management tools, our real estate data is kept securely offsite. Authorised users can still access that data whenever they want, but now they don't have to worry about restrictions associated with location. Using any advantages as well, including reduced hardware and maintenance costs (all of that is handled by the cloud provider), and improved team collaboration (as everyone has access to the same up-to-date information).

II. **Real estate management software demands reliable data security.**

There's a significant amount of personal information that goes into renting a property, which means that tenants have a lot riding on property management data security. If data is damaged, lost, or (worst of all) stolen, more than just the

tenant-manager relationship may be at stake.

Cloud-based real estate management greatly reduces risks to our and our client's data. A centralised, professionally managed database eliminates the danger of files being lost or misplaced. Likewise, local hazards such as fires and floods may devastate on-premises computer servers (destroying data in the process), whereas cloud-based data will remain untouched.

And, regarding data theft, most cloud-based real estate management software providers employ multiple layers of the most up-to-date safety measures, including authentication protocols, user privileges, and data encryption. And, in the unlikely event that data becomes corrupted, effective data-recovery techniques ensure that no lost information stays lost for long.

III. Real estate management software should make it easy for tenants to reach out.

As previously mentioned, one of the most valuable aspects of real estate management software is that it facilitates a better relationship between you and our tenants. The end goal, of course, is for every tenant to feel as though they're the only tenant (or at least the only one that matters). And, like any relationship, our relationship with our tenants depends on honest, open communication.

By moving real estate management to the cloud, you open up those channels of communication. The best real estate management software includes built-in client portals, where tenants can log in to access important information, share concerns, connect as a community, and get support. And because

not every tenant prefers to communicate in the same way, the best tools two-way street, and if our real estate management software doesn't make it easy for our offer a range of channels and support options.

Email, telephone, live chat, and more — the best tools will be able to incorporate every available channel into a single platform, so that no matter how tenants get in touch, you'll always be able to respond effectively. Remember, communication is a tenants to connect with you on their terms, then the relationship may suffer.

Real estate management software should feature built-in analytics.

Having easy access to property and customer data is essential, but unless you can use that data to inform our decisions, you're only getting part of the value. Of course, mining millions of data points for that odd insight is a bigger job than most property managers have the bandwidth for.

Built-in analytics tools do that job for you. These tools are able to automatically sift through all of the available information to find connections, causes, and clues that you might otherwise have overlooked. Forecasting marketing changes, measuring tenant behaviour, and generating accurate reports at the push of a button, built-in real estate analytics give you the insights you need to be able to act with confidence.

Advanced automation takes real estate management into the future.

With access to the right data, property managers can improve their business and better connect with their tenants. But checking reports and applying insights still takes time, and when you have a large number of clients, that's time you might not have — unless your real estate management software solution incorporates advanced AI.

Artificial intelligence (AI) picks up where more traditional automation leaves off. For example, A.I. can incorporate data to build tenant emails, suggest next steps, and find connections. And, with new advances in machine learning, property management AI can actually become smarter and more effective as it goes. If you want to provide our tenants with the best possible service, having AI enhanced real estate management software can make a significant difference, while also freeing you up to focus on what's truly important: the relationship, not just the details.

Salesforce revolutionises real estate management.

The rental industry is on the rise, and property management is growing to meet already the world leader in CRM technology, has long been used as a superior [real estate management system](#), making [CRM for real estate](#) a reality. And now, thanks to [specialised applications](#) built on the Salesforce Platform and incorporating the [most advanced AI](#) available, you can use those tools to manage our data, guide our tenants, and optimise our property management business.

our renters need more than just shelter — they need a property manager they know they can trust. With real estate management software from Salesforce, you can give your renters the support they need. Contact Salesforce today and start building relationships.

DISADVANTAGE

1. Expensive.
2. You have to pay for add-ons to get the most out of the software.
3. Configuration and setup is complex and time-consuming.
4. Cluttered interface makes navigation and simple tasks unnecessarily complex.
5. The learning curve never seems to end.
6. Customer support has a poor reputation

APPLICATIONS

1. Provides a management model
2. Everything in one single system
3. Maximum availability and security
4. Permenent access from anywhere
5. Your needs are personalized
6. Adjust language
7. Allows the creation of any report
8. Allows to sent emails
9. Allows to create recurring emails in template mode
10. Generation of alarms
11. User profile
12. Information backup
13. Chatter

CONCLUSION

In this project, in milstone-1 In activity-1 we have created Developer Account, acitivity-2 we have done Account Activation. Milestone-2, Acivity-1 to create navigate to setup page, Acivity-2 to create Object Buy, Activity-3 to creat Object Rent, Activity-4 to create Object loan. Milestone-3 in Activity-1 to create the Lightning Tab to create a tab : (Lead) , Activity-2 to create a Tab : (Buy), Activity-3 to create a Tab : (Rent), Activity-4 to create a Tab : (Loan). Milestone-4 in Activity-1 to create the Lighting App. Milestone-5 in Activity-1 to create the Lead Field, creat the remaining Fields:(Lead, State, City, Email, Phone), Activity- 2 to create the Buy Field, create the remaining Fields: (Buy, Discount, State, City), Activity-3 to create the Rent Field, create the remaining Fields:(Rent, Rental City, BHK type), Activity-4 to create the Loan Field, create the remaining Fields : (Loan Id, Interest Rate, Term, Annual Loan, Total Loan Instalments, loan Repayment, Loan Amount). Milestone-6 in Activity-1 to create a new profile , Activity-2 to create Marketing and

Activity-3 Sales. Milestone-7 in Activity-1 to create user. Milestone-8 in Activity-1 to create the Permission Sets. Milestone-9 in Activity-1 to create OWD setting, Activity-2 to create Marketing and Sales. Milestone-10 in Activity-1 in to create Report. Milestone-11 in Activity-1 to create Dashboard.

FUTURESCOPE

With over 150,000 organizations utilizing Salesforce across the world to fuel their growth, it is the most popular and widely used CRM platform. Industries have adopted Salesforce for their daily procedures and work needs across the board. Small-scale companies to Internet behemoths like Google and Facebook use Salesforce's services and products to solve business challenges.

Salesforce's ability to customize, build, and distribute apps has sparked innovation and accelerated cloud adoption in the advent of digital technology.

It is predicted that Salesforce will be widely used in retail, communications, and media industries. Within the Salesforce ecosystem, the financial services and manufacturing industries are expected to grow the fastest, among others. A Salesforce certification can help you future-proof your career if you already work in one of these fields. So, you are already ahead of the game!

Businesses are rapidly digitizing, and the cloud is an important factor in their success. As a result, strengthening abilities in cloud technologies like Salesforce will act as a catalyst for success.

Now that you have the slightest idea of what Salesforce hype is all about, let's uncover the career opportunities the ecosystem offers.

THANK YOU