

PROJECT REPORT TEMPLATE

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

Develop an app for the Property Management where buyer can order his requirements and get the Appropriate Details of the Property.

1.1 OVERVIEW

In my project they are 11 milestones and we complete this milestones. As manual we created this milestones step by step.

1. In this we create developer account and sign it and then login to our salesforce account.
2. In this we create object names and we can save all objects namely Buy, Rent and Loan.
3. In this we build records for objects and then select tab and tab style for all objects.
4. In this we create app namely Property Management and add suitable items.
5. In this we created new field for Buy, Rent and Loan.
6. In this we create event user profile and sales profile.
7. In this we create user and as a sales profile.
8. In this we create permission set for supplier and review object.
9. In this we access OWD setting in salesforce such as marketing and sales.
10. In this we create report for Loan amount and accounts.
11. In this we create dashboard for account and new lead with loan report.

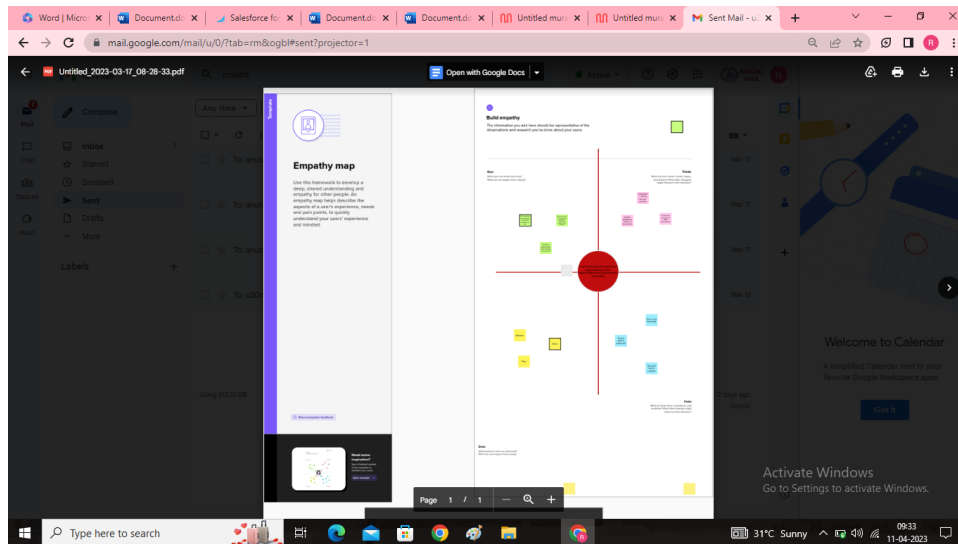
1.2 Purpose

- Streamline lead, opportunity, and contact management
- Simplify document management and data sharing
- Enhance communication and collaboration tools
- Have reminders and notifications of important events, emails, and calls
- Synchronize calendar, task management system, and email services with the CRM
- Integrate digital advertising with the client-management system
- Centralize management of all tenure contracts, units, and other data
- Stay in touch with clients, monitor all client communications, and rent administrator's activities and their statuses
- Synchronize Activity administration and email tracking

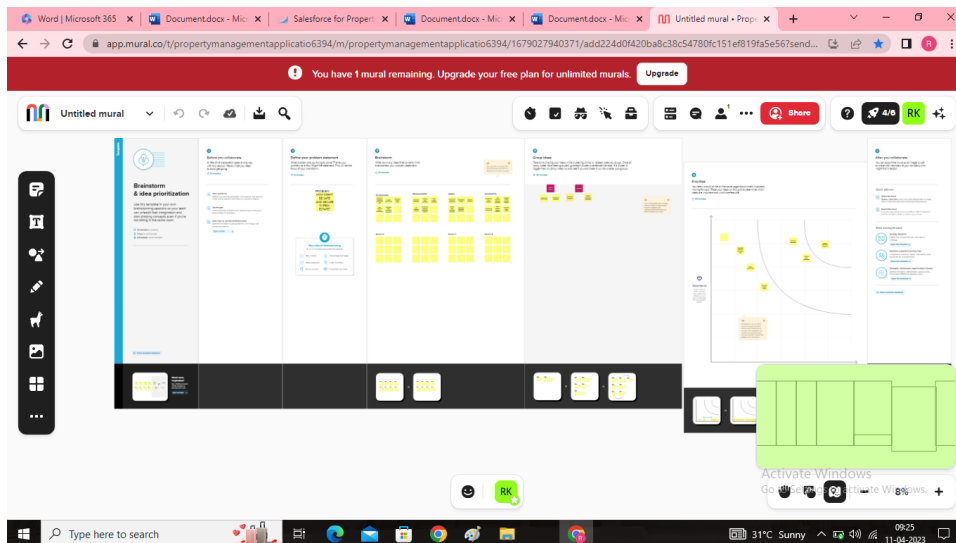
- Integrate a website with a customer portal to allow for requests, client profiles, account statements, etc.
- Automate conditional and client's approvals and workflows

PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



IDEATION AND BRAINSTORMING MAP



RESULT

Document.docx - Microsoft Word | New Accounts | Salesforce

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Property Management... Loans Leads Buyers Rents New Accounts

Report: Accounts
New Accounts

Enable Field Editing

Total Records: 13

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

Document.docx - Microsoft Word | New Lead with Loan Amount | Salesforce

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Property Management... Loans Leads Buyers Rents New Lead with Loan Amount

Report: Loans
New Lead with Loan Amount

Enable Field Editing

Total Records: 5
Total Interest Rate: ₹39,000
Total Loan Amount: ₹43,00,000

Total Loan Installments	Interest Rate	Loan Amount
<input type="checkbox"/> 1,00,000 (1)	₹5,000	₹6,00,000
Subtotal	₹5,000	₹6,00,000
<input type="checkbox"/> 2,00,000 (1)	₹4,000	₹5,00,000
Subtotal	₹4,000	₹5,00,000
<input type="checkbox"/> 4,50,000 (1)	₹6,000	₹7,00,000
Subtotal	₹6,000	₹7,00,000
<input type="checkbox"/> 5,00,000 (1)	₹10,000	₹10,00,000
Subtotal	₹10,000	₹10,00,000
<input type="checkbox"/> 6,00,000 (1)	₹14,000	₹15,00,000
Subtotal	₹14,000	₹15,00,000
Total (5)	₹39,000	₹43,00,000

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

ADVANTAGES

- ❖ Maintenance Management & Tracking.
- ❖ Tenant Applications & Screenings.
- ❖ Online Payments.
- ❖ Contact Management.
- ❖ Advertising & Marketing.
- ❖ Financial Management.

DISADVANTAGES

- ❖ Time-consuming if you choose the wrong system. ...
- ❖ Might seem expensive for a small business. ...
- ❖ Training (cost and time).

APPLICATIONS

- Bookings.
- Check-in and check-out.
- Telephone systems integration.
- Point of sale (POS) integration.
- Event planning.
- Food and beverage costing.

CONCLUSION

Property **Management System (PMS) software is very crucial for all the Hotels.** Especially Opera PMS constitutes the most appropriate PMS .

FUTURE SCOPE

Property managers' work became very appreciated when the world started to suffer a pandemic. Property managers were underrated until their services were imperative to keep rental properties above water.

APPENDIX

A.Source Code