

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1.INTRODUCTION :

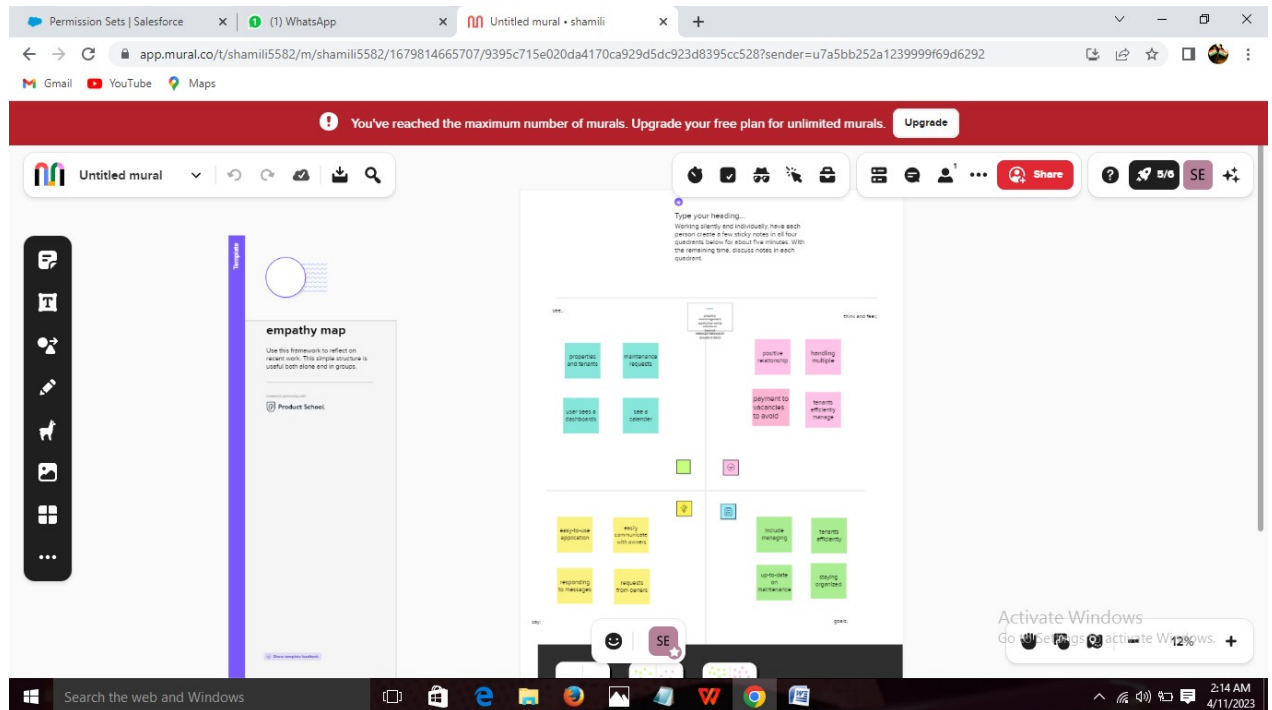
1.1. A property management application using Salesforce is a system designed to help property managers streamline and automate their daily operations using Salesforce, a popular customer relationship management (CRM) platform. This application can assist in various aspects of property management, including tenant management, maintenance tracking, financial reporting, and lease management

1.2.Tracking Property Details: The application can be used to maintain a database of all the properties managed by a property management company. This can include details such as the property address, type of property, number of units, current tenants, and lease agreements

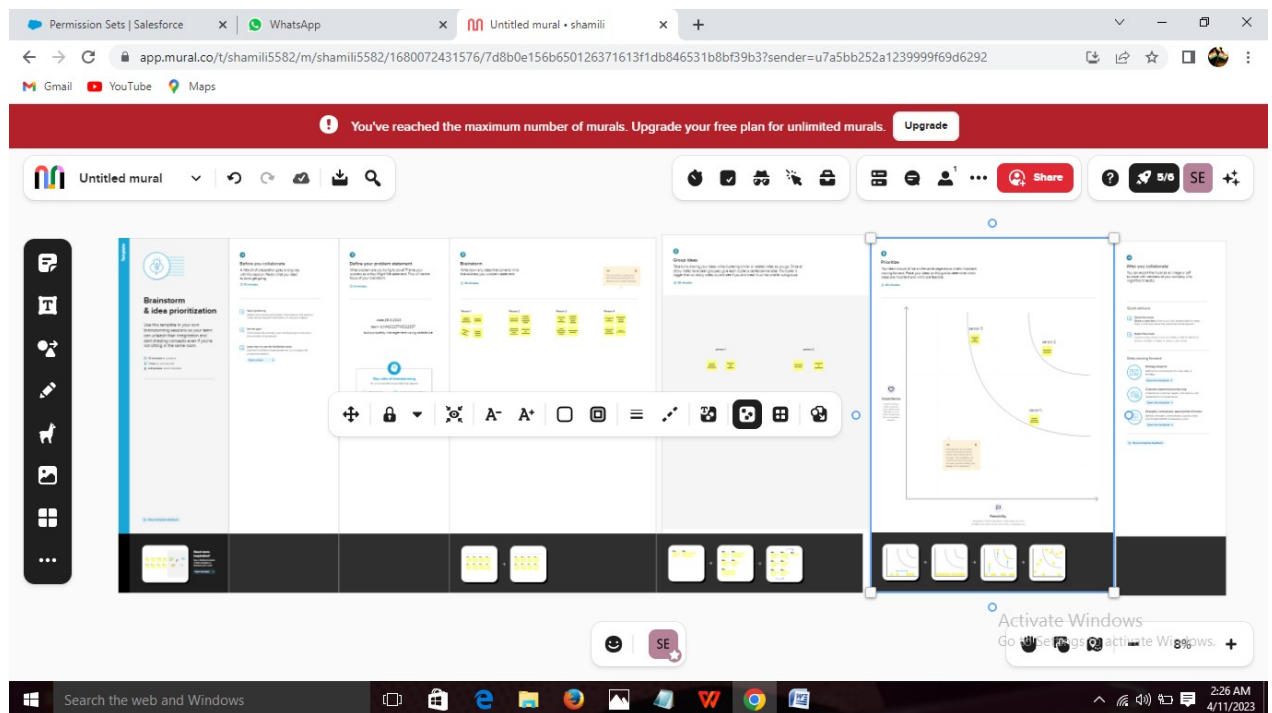
Problem Definition & Design Thinking

2.1.Empathy

Map



2.2. Brainstorming Map



3.RESULTS:

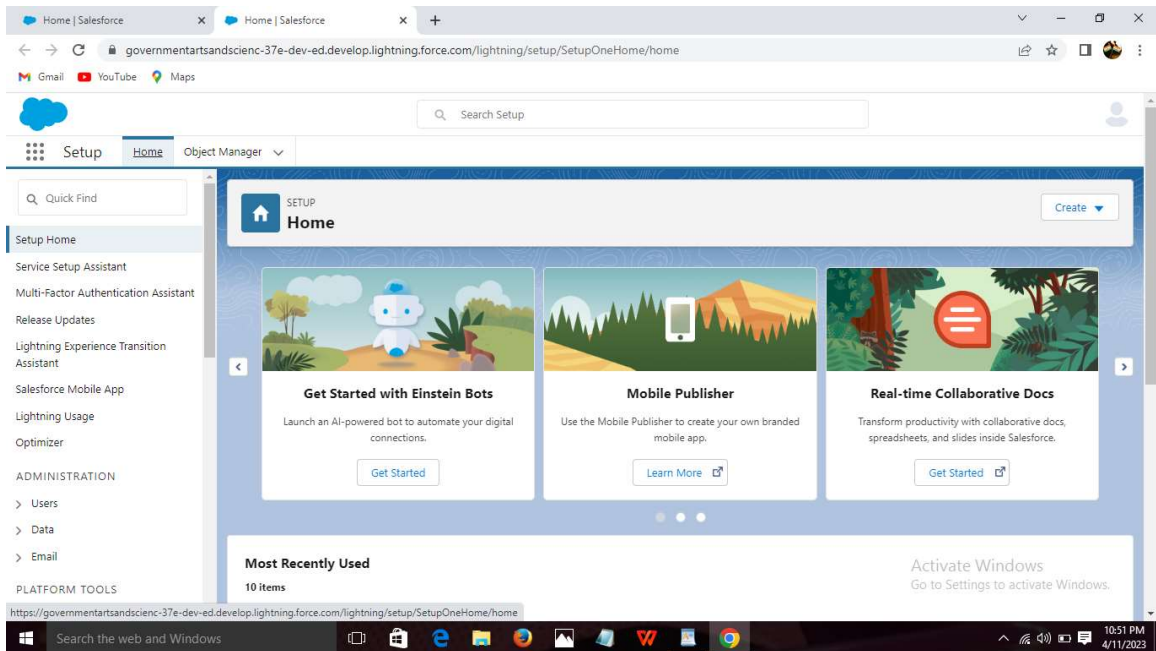
3.1.Data Model:

Object name	Fields in the object	
Buy	Field Label	Data Type
	Buy	Text
City	Field Label	Data Type
	city	text
Annual loan	Field Label	Data Type
	Annual loan	text
BHK type	Field Label	Data Type
	BHK Type	picklist
State	Field Label	Data Type
	State	picklist

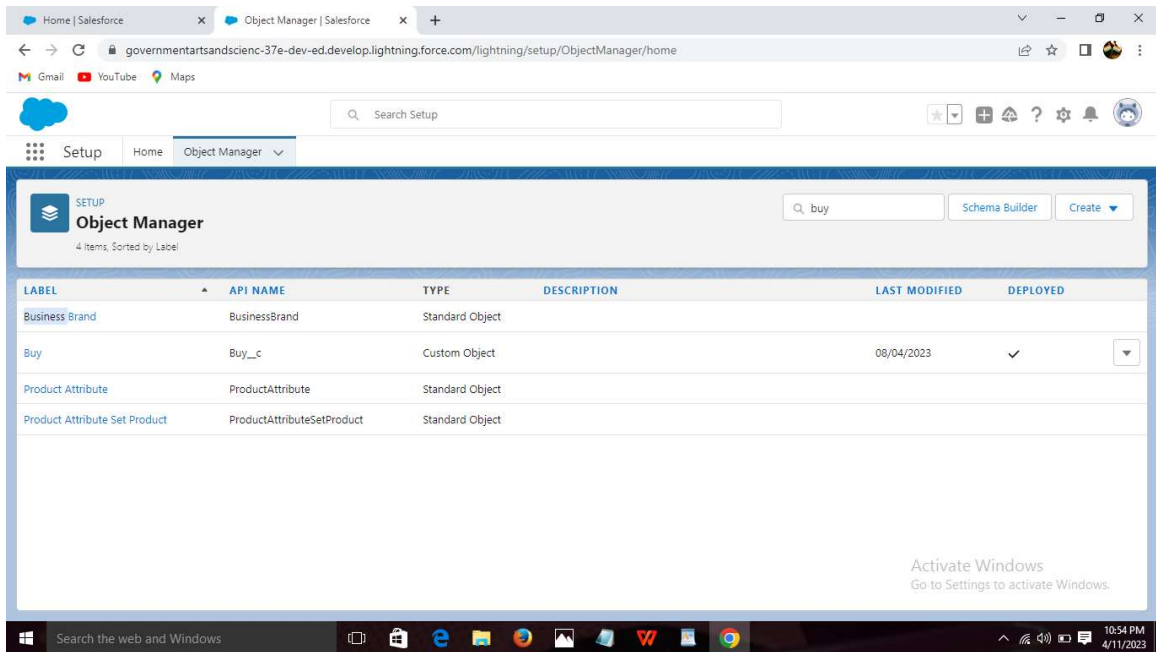
3.2 Activity&Screenshot

Milestone 1

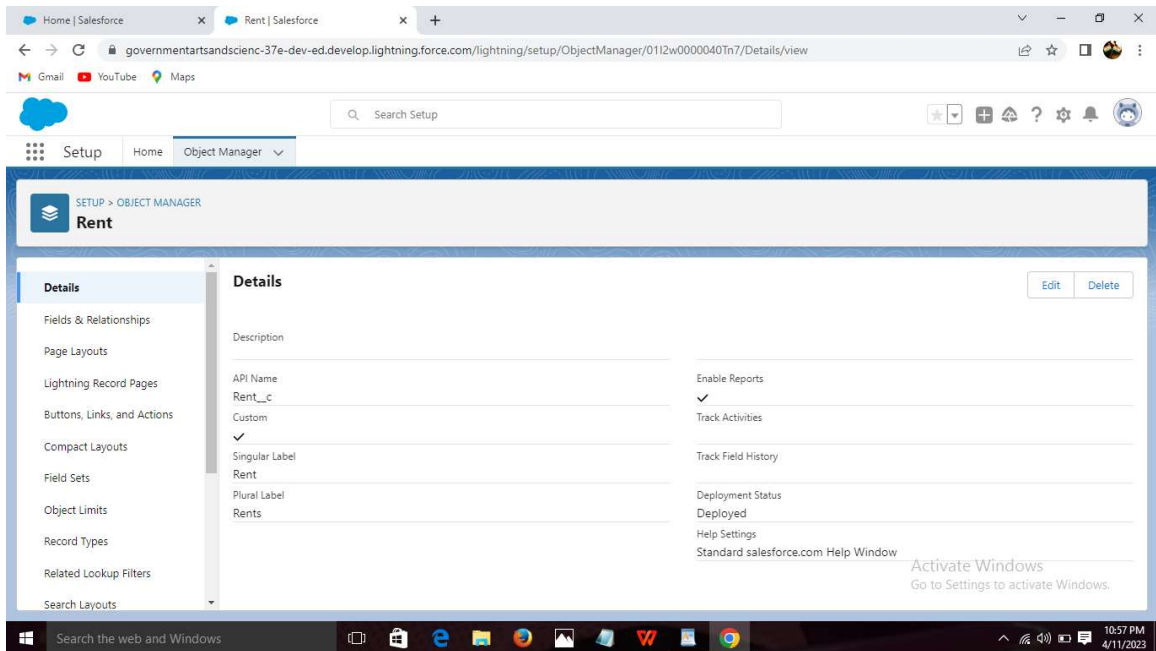
Activity 1:



Activity2:

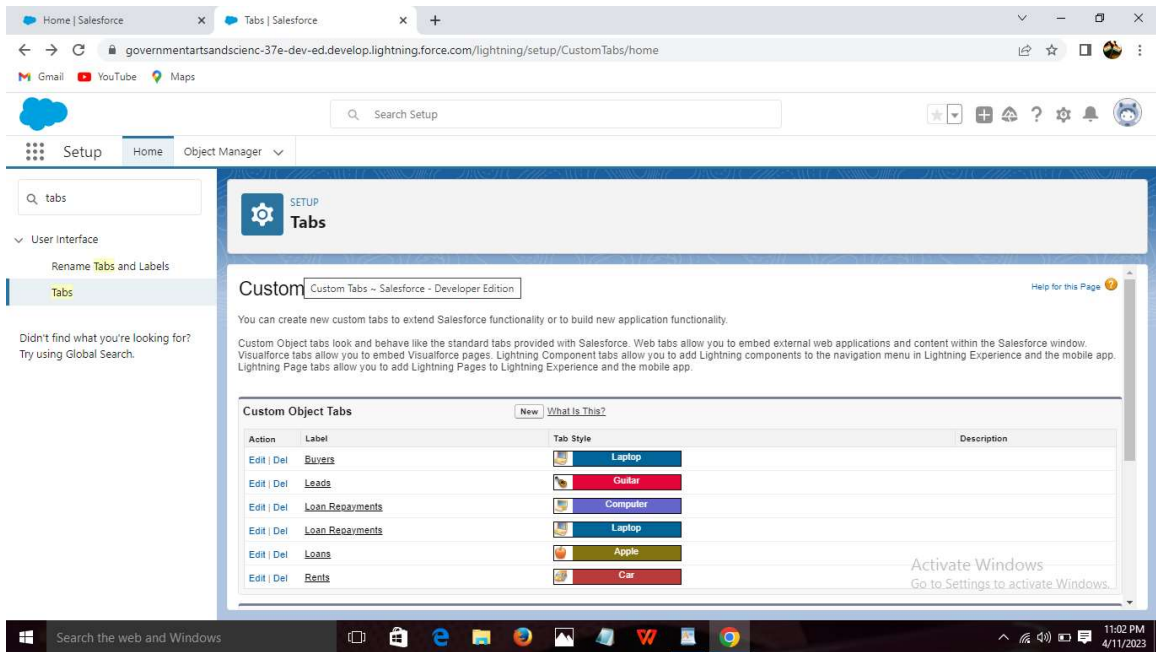


Activity3:

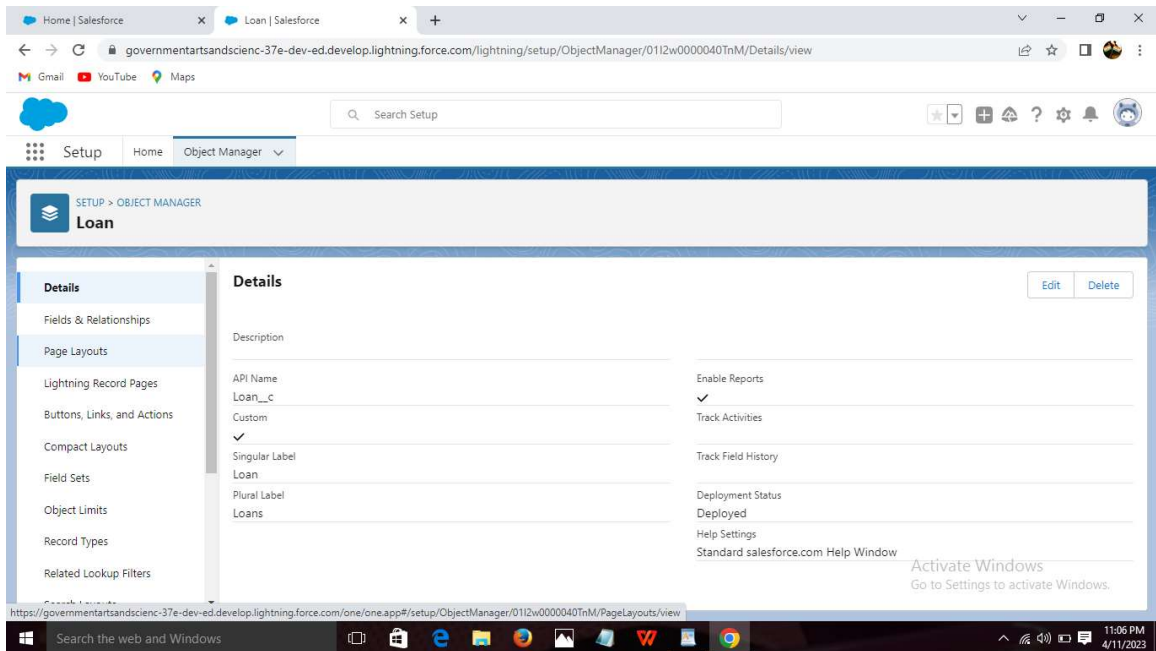


Milestone3:

Activity1:

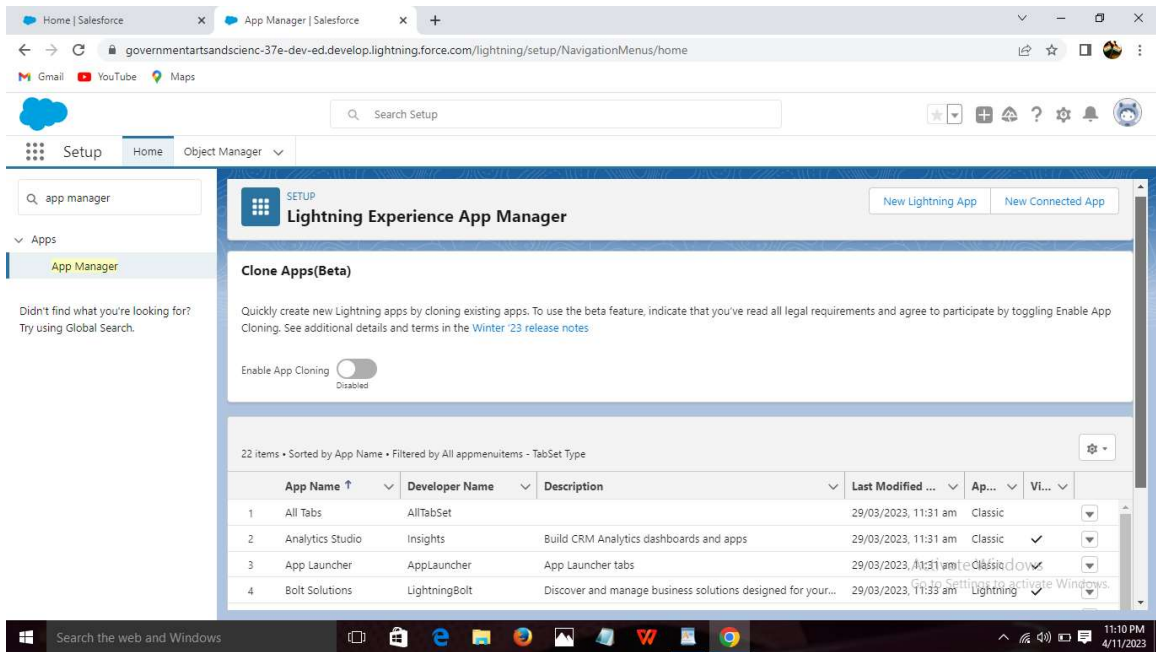


Activity2:



Milestone4:

Activity1:



milestone5:

activity1:

Home | Salesforce x State | Salesforce x +

governmentartsandscienc-37e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000040kj1/Details/view

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

State

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Details

Description

API Name

State__c

Custom

✓

Singular Label

State

Plural Label

States

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Activate Windows

Go to Settings to activate Windows.

https://governmentartsandscienc-37e-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/012w0000040kj1/PageLayouts/view

Search the web and Windows

11:19 PM 4/11/2023

Activity2:

Home | Salesforce x Property type | Salesforce x +

governmentartsandscienc-37e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000040klM/Details/view

Gmail YouTube Maps

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Setup Home Object Manager

SETUP > OBJECT MANAGER

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Property_type__c

Custom

✓

Singular Label

Property type

Plural Label

Property types

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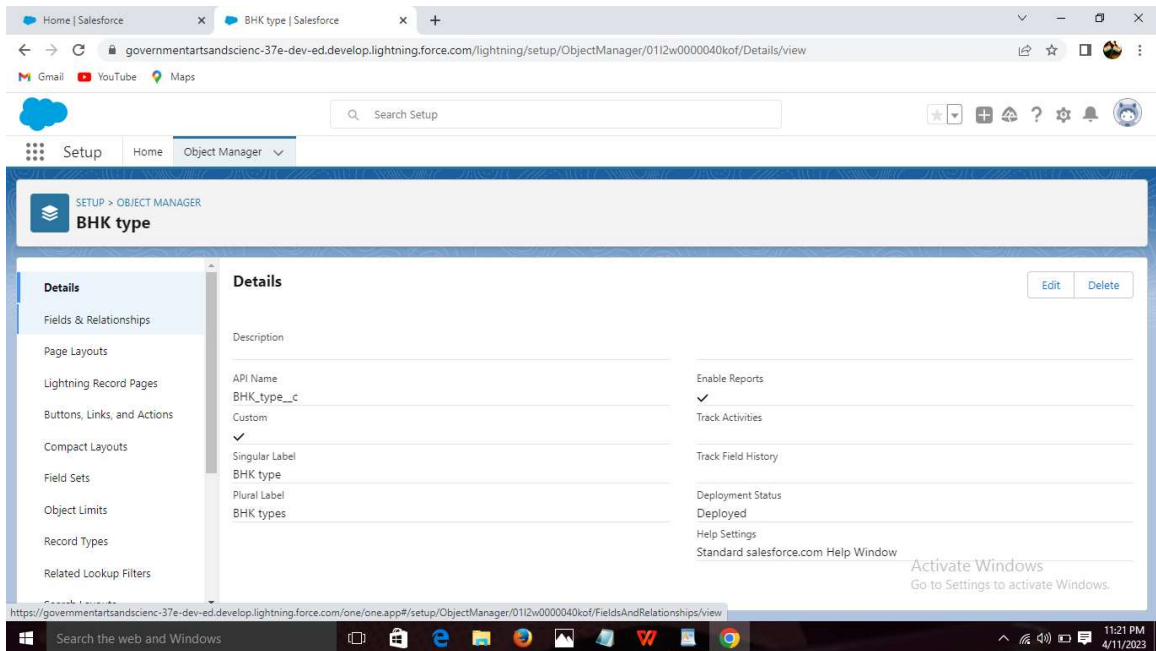
Go to Settings to activate Windows.

https://governmentartsandscienc-37e-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/012w0000040klM/FieldsAndRelationships/view

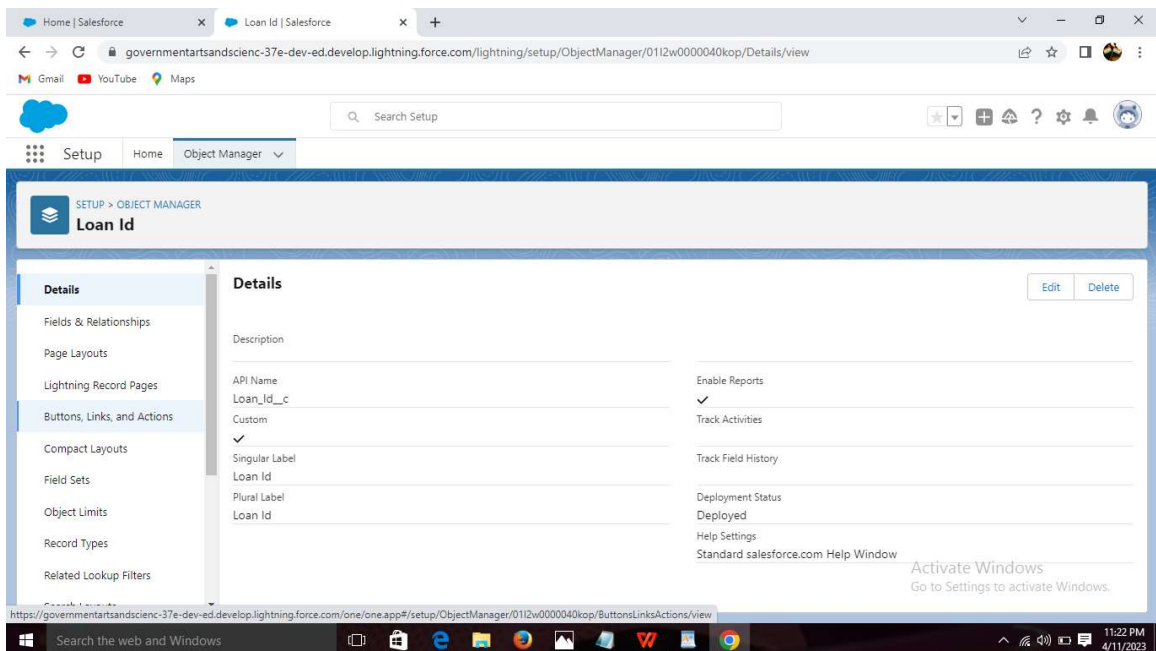
Search the web and Windows

11:20 PM 4/11/2023

Activity3:



Activity4:



Milestone6:

Activity1:

Salesforce Setup: Profiles

Profiles

1-25 of 43 | 0 Selected

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Del ...	clone	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	clone the desired	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>

Milestone7:

activity1:

Salesforce Setup: Users

All Users

On this page you can create, view, and manage users.

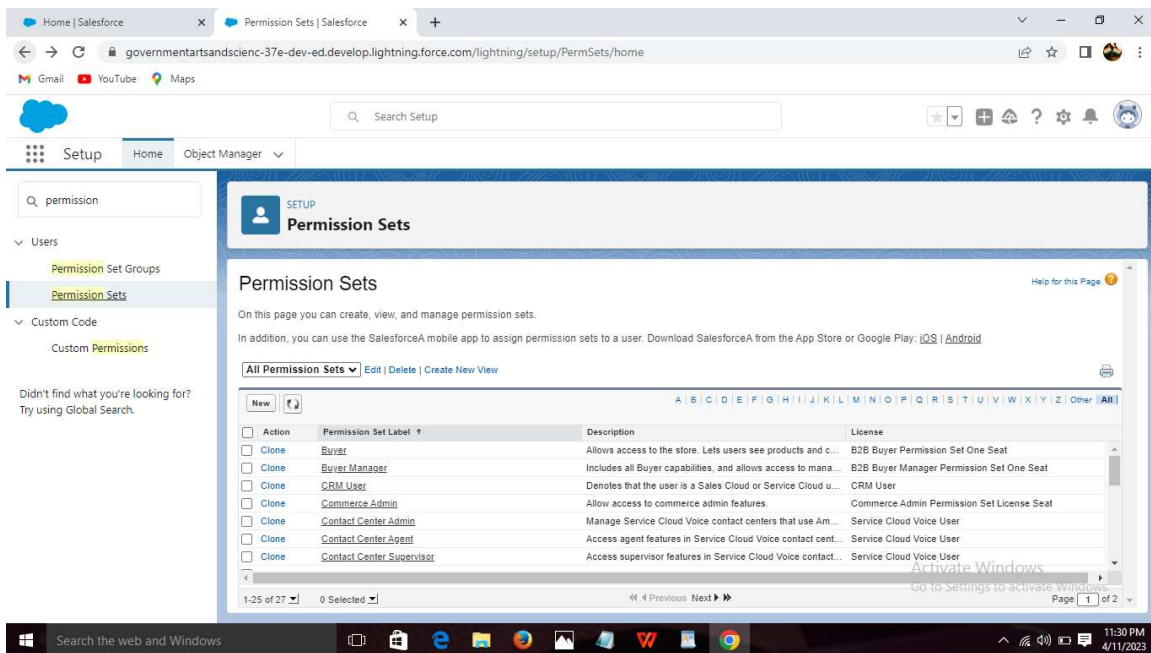
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter_00d2w00000ra8beaf@vvpbltn9j@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	E_SHAMILI	SE	shamili@stat.com		<input checked="" type="checkbox"/>	System Administrator
Edit	E_SHAMILI	st	shamili@angpvan@gmail.com	CFO	<input checked="" type="checkbox"/>	Standard Platform User
Edit	User Integration	integ	integration@00d2w00000ra8beaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d2w00000ra8beaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone8:

Activity1:

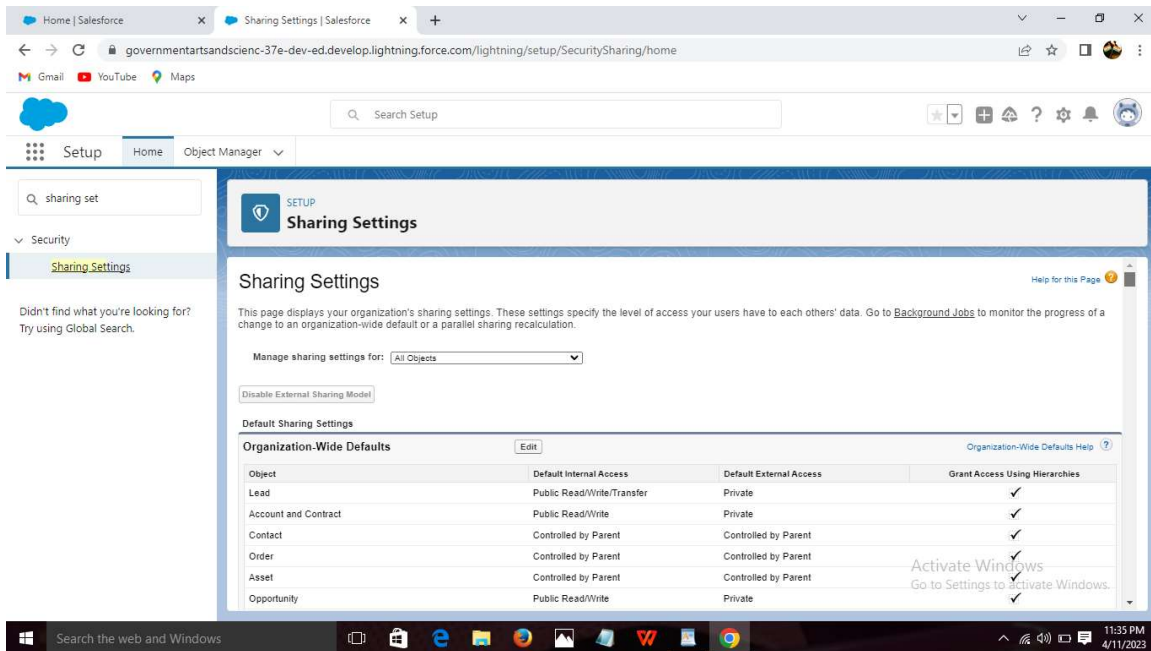


The screenshot shows the Salesforce Setup page for Permission Sets. The left sidebar contains a search bar with "permission" and a list of categories: Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled "Permission Sets" and includes a "New" button and a list of existing permission sets. The table below shows the details of these permission sets.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	82B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	82B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User

Milestone9:

Activity1:



The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar contains a search bar with "sharing set" and a list of categories: Security, Sharing Settings (selected), and Sharing Sets. The main content area is titled "Sharing Settings" and includes a "Manage sharing settings for" dropdown menu set to "All Objects". Below this is a table showing the default 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	✓

Milestone10:

Activity1:

The screenshot shows the Salesforce Reports page. The left sidebar contains navigation options: Recent (3 items), Private Reports, Public Reports, All Reports, FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (To Do List). The main content area displays a table of recent reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Users Report		Private Reports	SHAMILI E	8/4/2023, 10:05 pm	
New Loan Amounts Report		Private Reports	SHAMILI E	8/4/2023, 9:52 pm	
New Solution Categories Report		Private Reports	SHAMILI E	8/4/2023, 9:40 pm	

At the bottom of the screen, there is a Windows taskbar with the date 4/11/2023 and time 11:52 PM.

Milestone11:

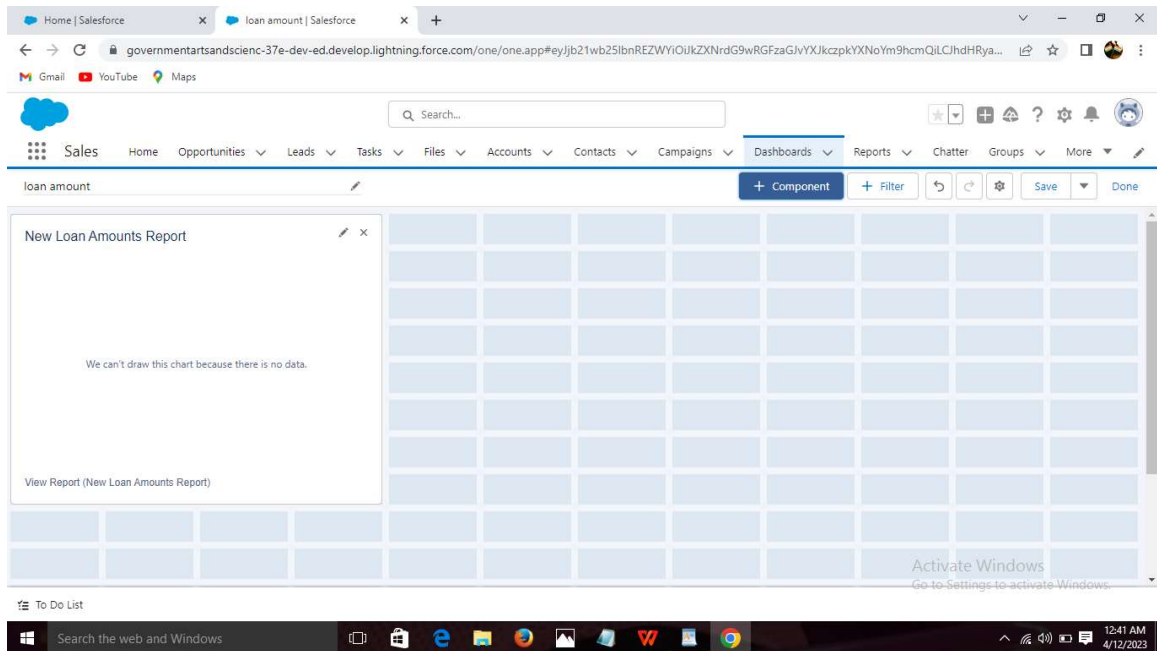
Activity1:

The screenshot shows the 'New Solution Categories Report' in Salesforce. The report is displayed in a table format with columns for Solution Title and Solution Details. The table contains two rows of data:

Sol--	Solution Title	Solution Details
0000 0001	GC1020 Portable Generator Switch Malfunctioning	If the generator switch is not working, remove the switch and re-assemble it. Often the switch gets displaced by a fraction of an inch preventing it from engaging with the
0000 0002	Generator assembly instructions unclear	The Maintenance Manuals for the GC1020 are currently in review and will be shortly updated and distributed to all customers. We have received a

The report is titled 'New Solution Categories Report' and includes a 'View Report (New Solution Categories Report)' link. The Windows taskbar at the bottom shows the date 4/12/2023 and time 12:37 AM.

Activity2:



4.Trailhead profile public URL

Team lead-<https://trailblazer.me/id/shamili27052003>

Team member1-<https://trailblazer.me/id/santr53>

Team member2-trailblazer.me/id/triel

Team member3-trailblazer.me/id/

soundharya2003`

5.ADVANTAGES&DISADVANTAGE

Contact Management: Salesforce can be used to manage the contact information of tenants, property owners, contractors, and other stakeholders involved in property management. This can include their contact details, lease agreements, and other relevant information.

Customization: Salesforce is highly customizable, allowing property managers to tailor the application to their specific needs. They can add or remove fields, create custom reports and dashboards, and build workflows and automations that match their business processes

6.APPLICATION

Cost: Salesforce can be expensive, especially for small property management businesses. The cost of licenses, implementation, and customization can add up quickly, and ongoing maintenance and support costs can also be significant.

7.CONCLUSION

Overall, a property management application built on the Salesforce platform can help property managers streamline workflows, improve communication, and stay organized, ultimately leading to more efficient and effective property management.

8. FUTURE SCOPE

Mobile Optimization: With the increasing use of mobile devices, property management applications will need to be optimized for mobile platforms to provide access to key features and data from anywhere, at any time.

AI and Machine Learning: Artificial Intelligence (AI) and machine learning can be used to automate various tasks involved in property management, such as rent collection, maintenance requests, and lease agreements. This can help property managers to save time and improve accuracy.