

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

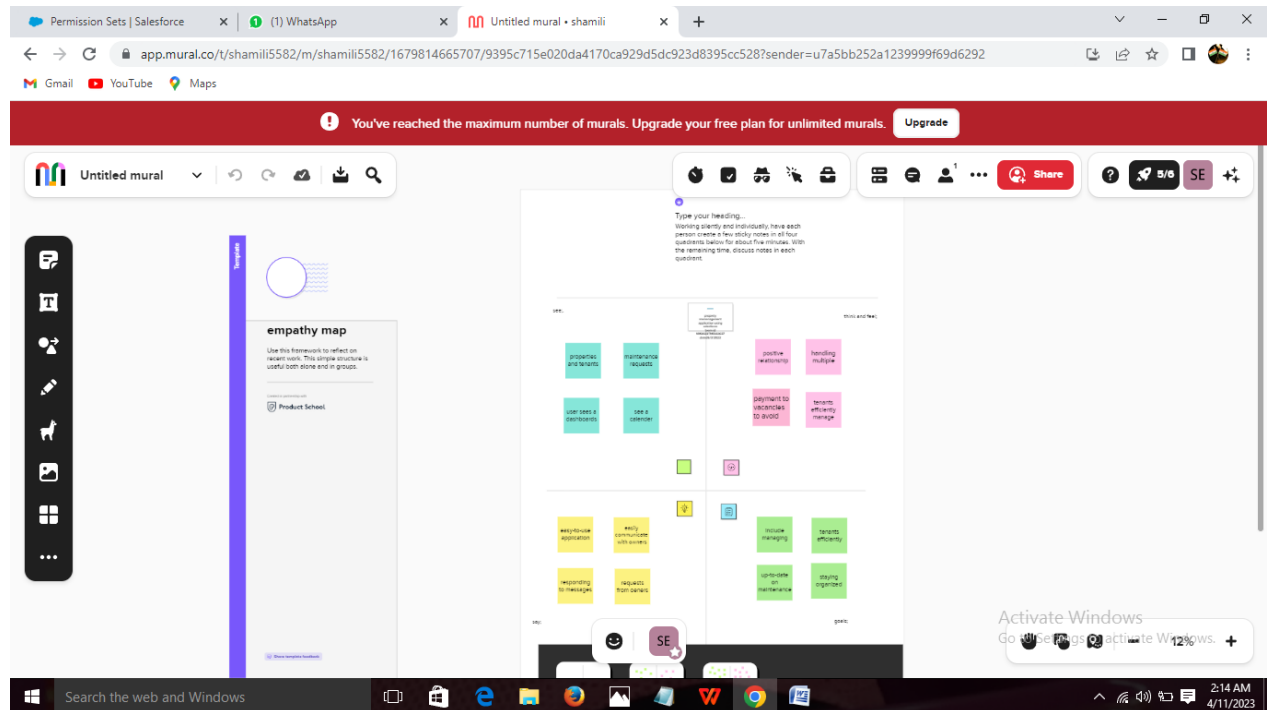
1.INTRODUCTION :

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

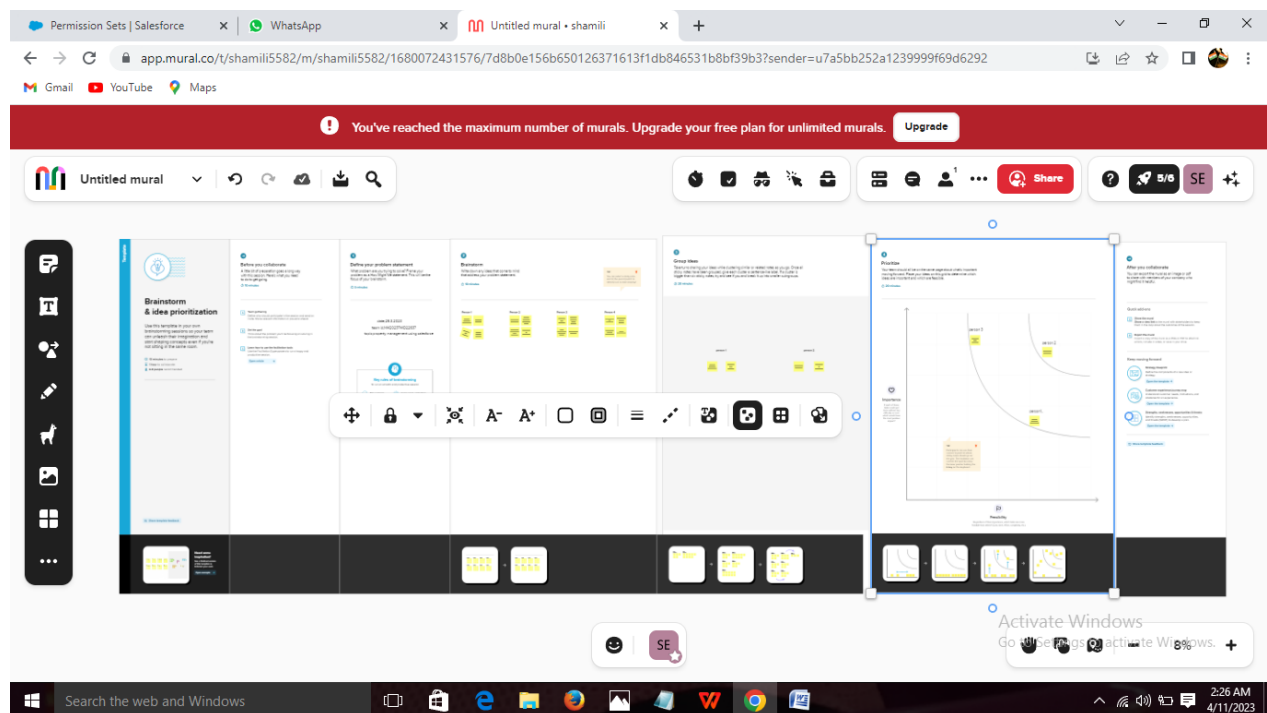
1.2.Tracking Property Details: The application can be used to maintain a database of all the properties managed by a property management company. This can include details such as the property address, type of property, number of units, current tenants, and lease agreements

Problem Definition & Design Thinking

2.1. Empathy Map



2.2. Brainstorming Map



3.RESULTS:

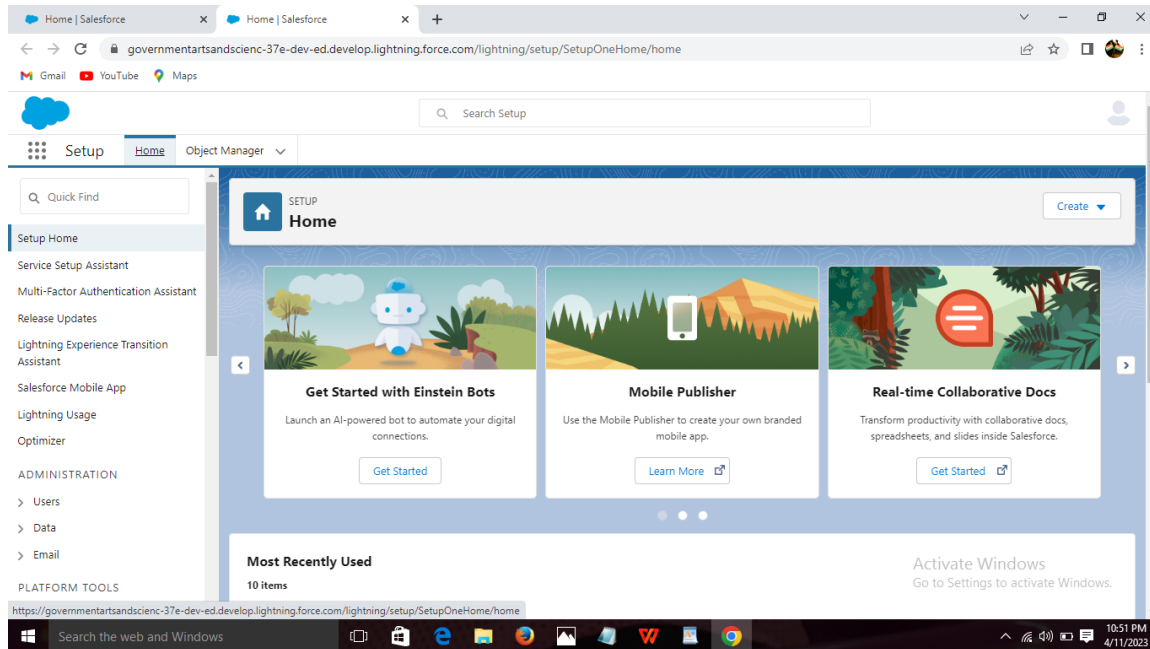
3.1.Data Model:

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

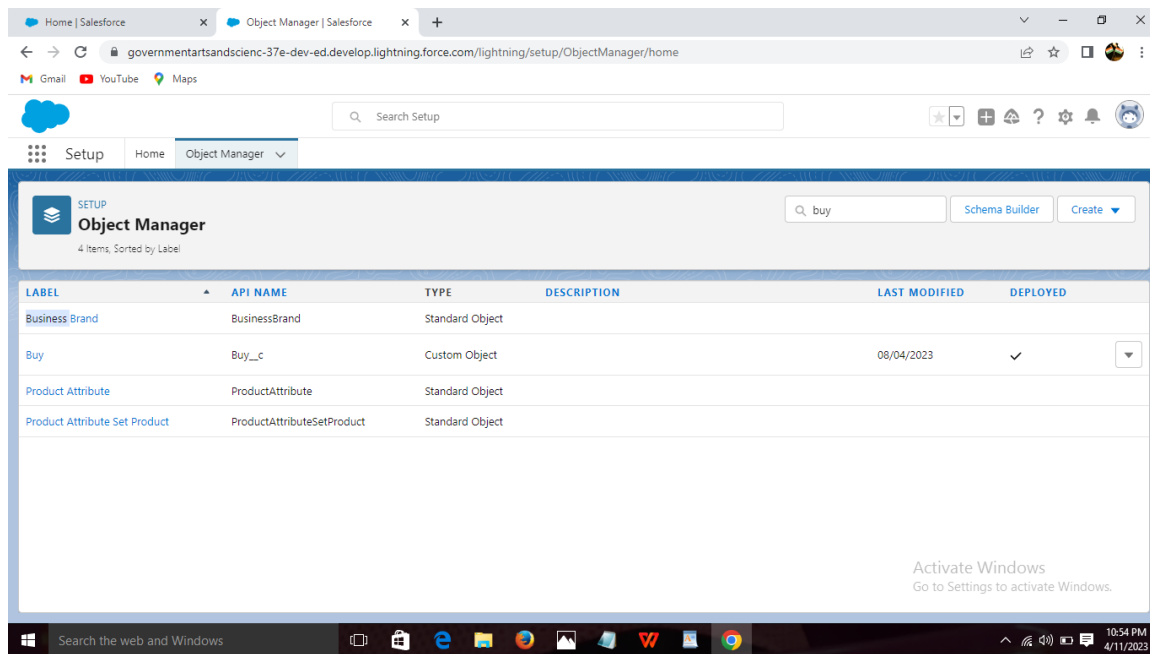
3.2 Activity&Screenshot

Milestone 1

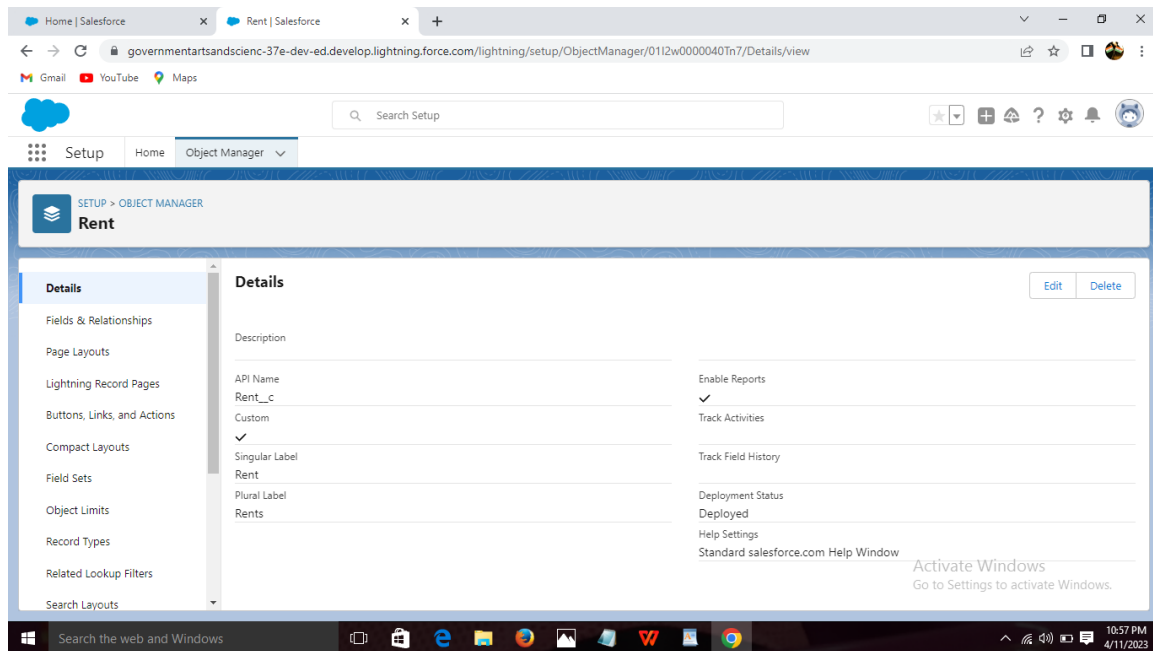
Activity 1:



Activity2:

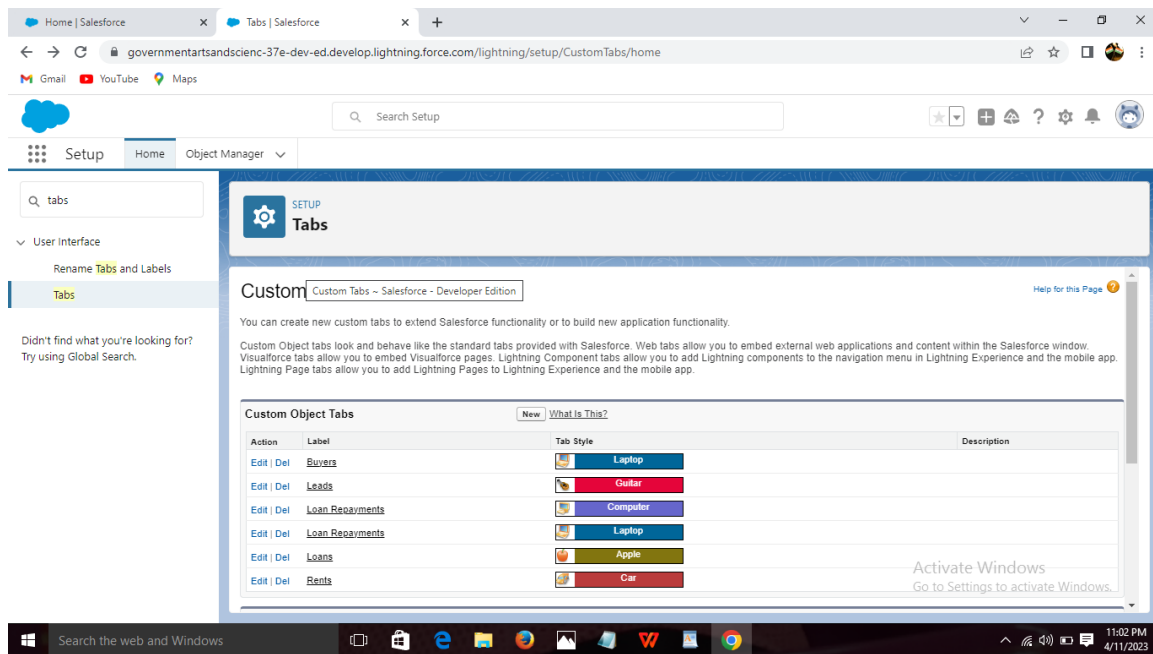


Activity3:

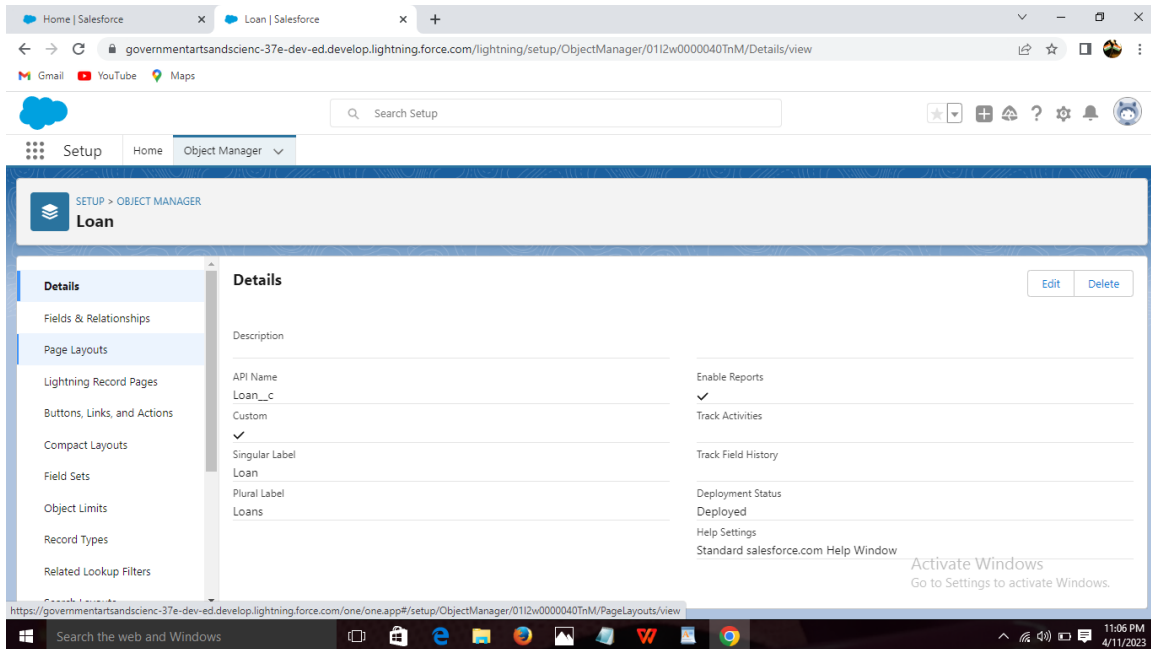


Milestone3:

Activity1:

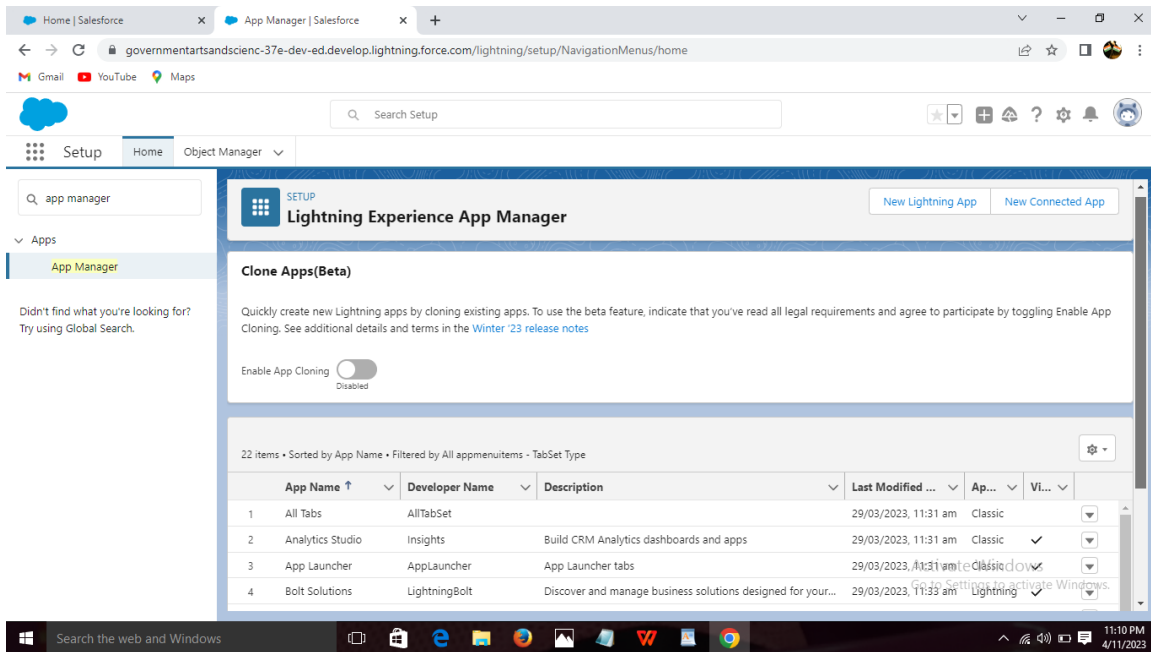


Activity2:



Milestone4:

Activity1:



milestone5:

activity1:

Home | Salesforce x State | Salesforce x +

governmentartsandscienc-37e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040kj1/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/0112w0000040kj1/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/0112w0000040kiM/Details/view

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Property type

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
Property_type__c

Custom

✓

Singular Label
Property type

Plural Label
Property types

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

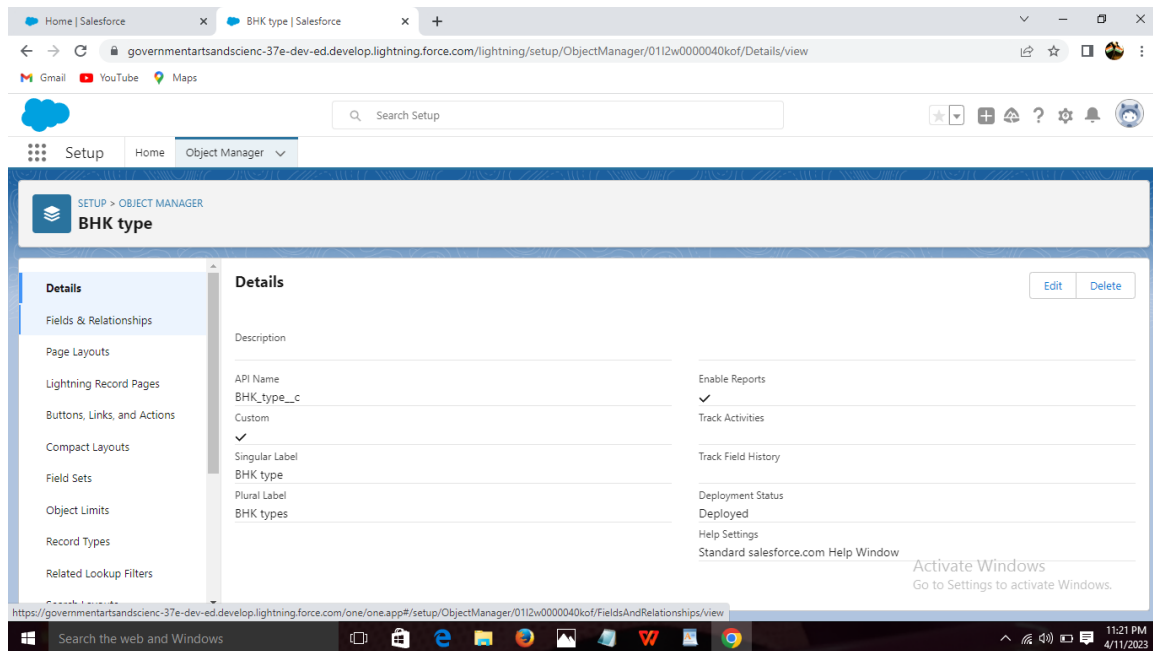
Activate Windows
Go to Settings to activate Windows.

https://governmentartsandscienc-37e-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0112w0000040kiM/FieldsAndRelationships/view

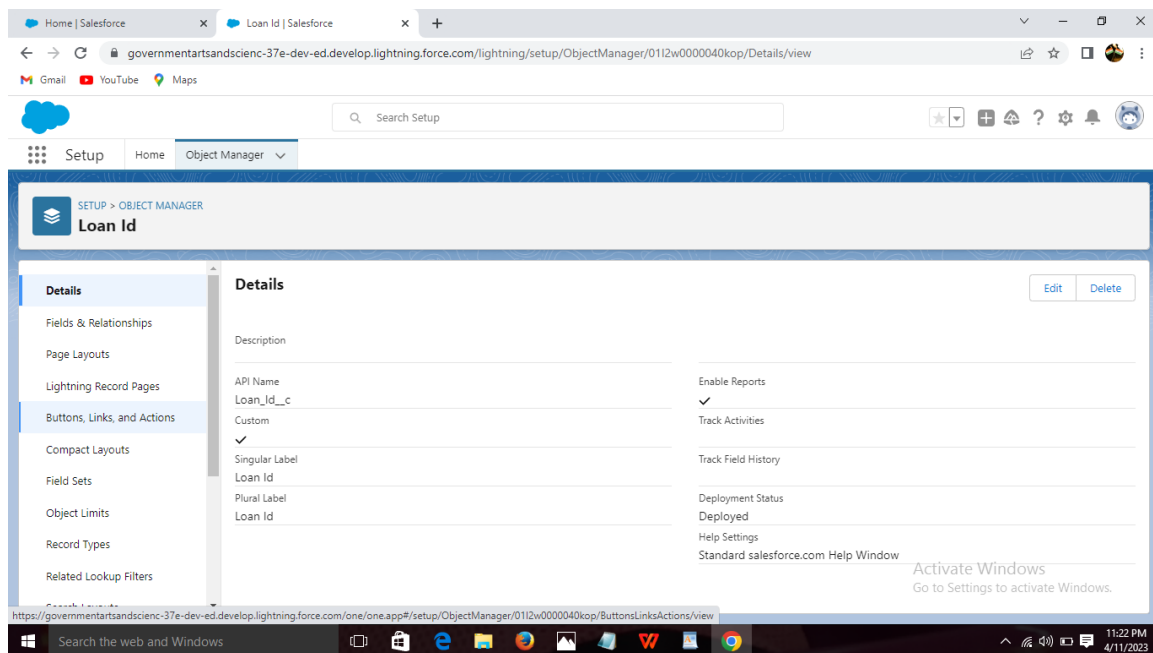
Search the web and Windows

11:20 PM
4/11/2023

Activity3:

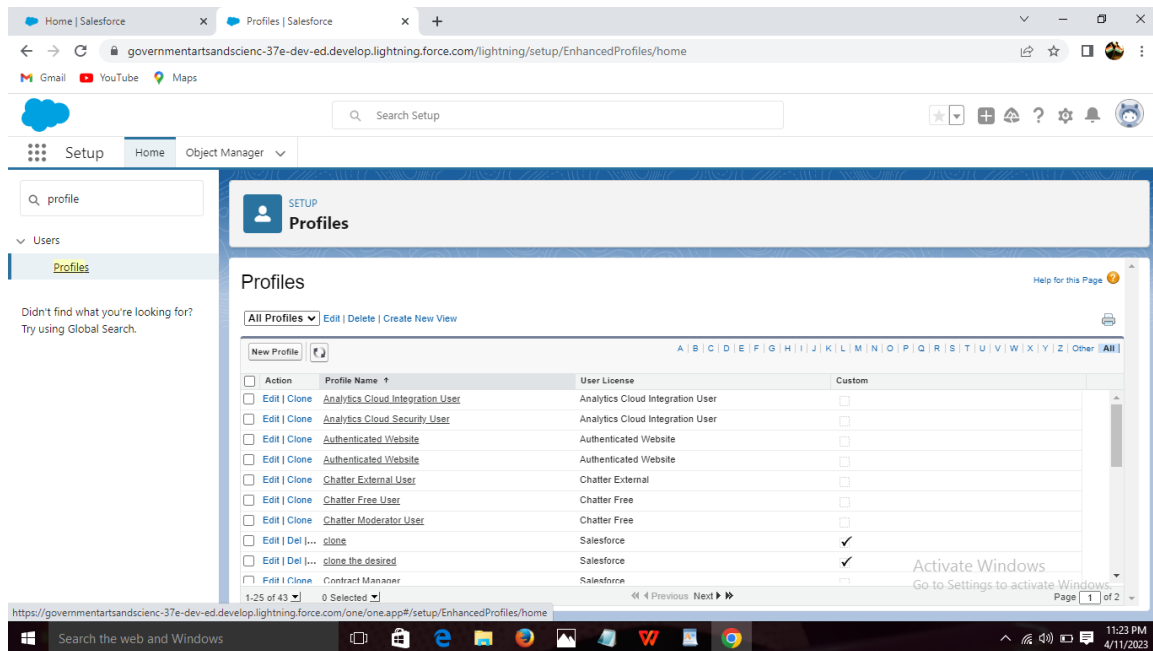


Activity4:



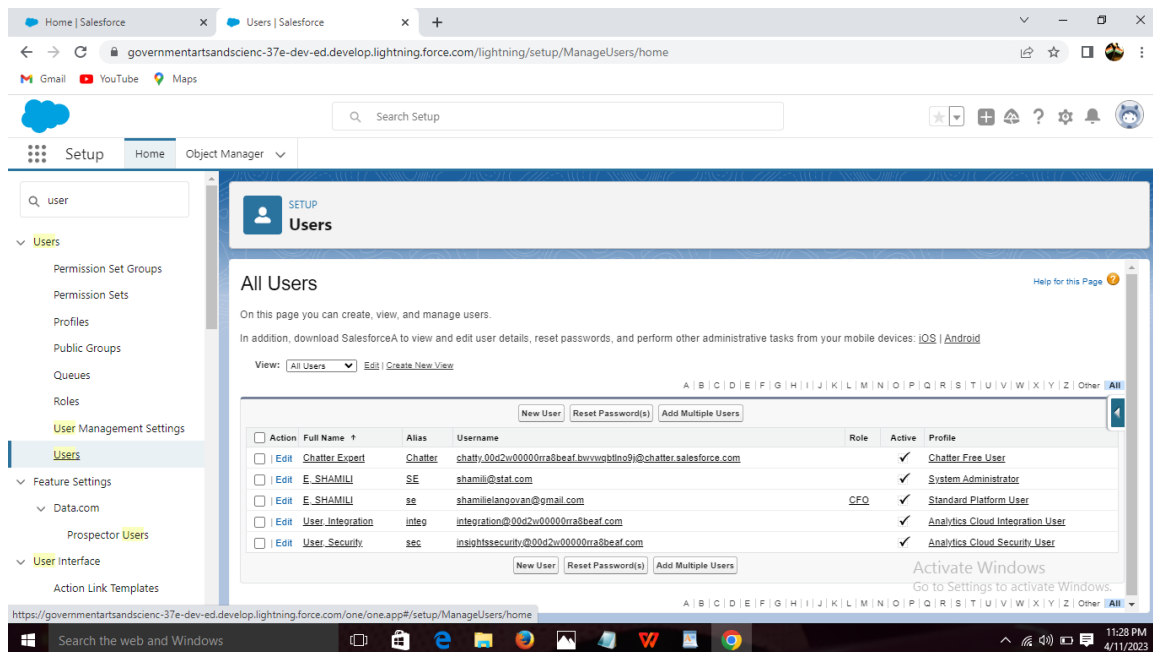
Milestone6:

Activity1:



Milestone7:

activity1:



Milestone8:

Activity1:

Home | Salesforce

Permission Sets | Salesforce

governmentartsandsdscienc-37e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B 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

1-25 of 27 0 Selected Previous Next

Page 1 of 2

Search the web and Windows

11:30 PM 4/11/2023

Milestone9:

Activity1:

Home | Salesforce

Sharing Settings | Salesforce

governmentartsandsdscienc-37e-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Search Setup

Setup Home Object Manager

sharing set

Security

Sharing Settings

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

SETUP Sharing Settings

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

(Disable External Sharing Model)

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

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	✓

Search the web and Windows

11:35 PM 4/11/2023

Milestone10:

Activity1:

The screenshot shows the Salesforce Reports page. The left sidebar contains navigation links: Reports, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, Groups, and More. The main content area displays a list of recent reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are:

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	

The bottom of the screen shows the Windows taskbar with the time 11:52 PM and date 4/11/2023.

Milestone11:

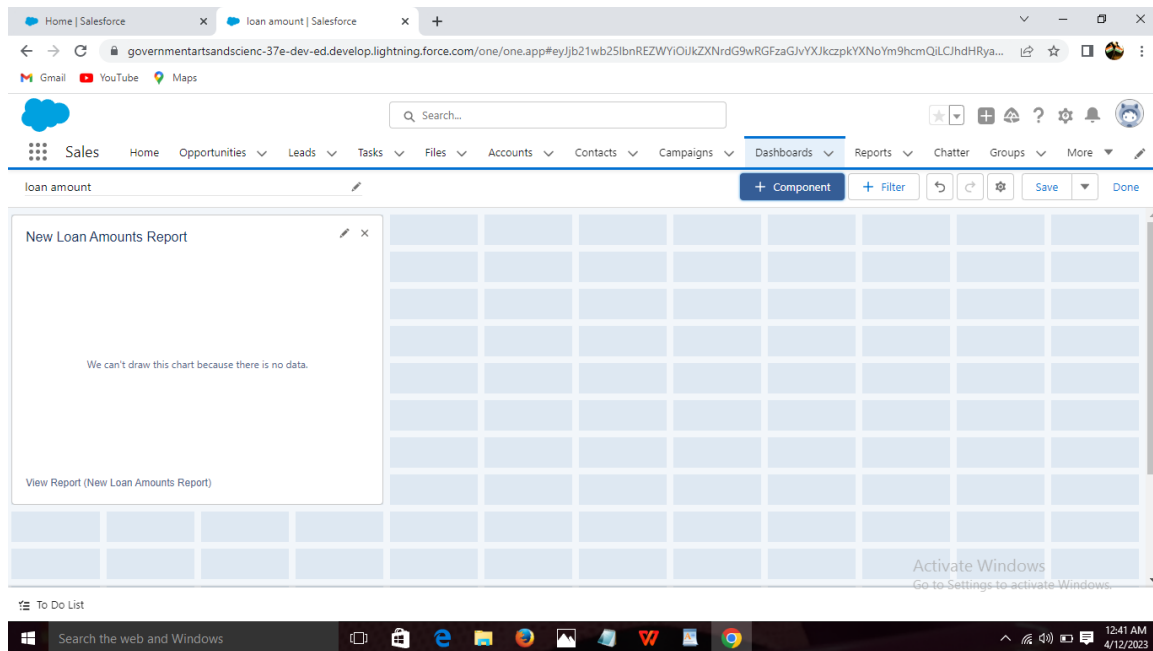
Activity1:

The screenshot shows the 'New Solution Categories Report' in Salesforce. The report is displayed in a table format with columns: Sol..., Solution Title, and Solution Details. The data rows are:

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 bottom of the screen shows the Windows taskbar with the time 12:37 AM and date 4/12/2023.

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

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.