

PROPERTY MANAGEMENT USING SALESFORCE

1 INTRODUCTION

1.1 Overview

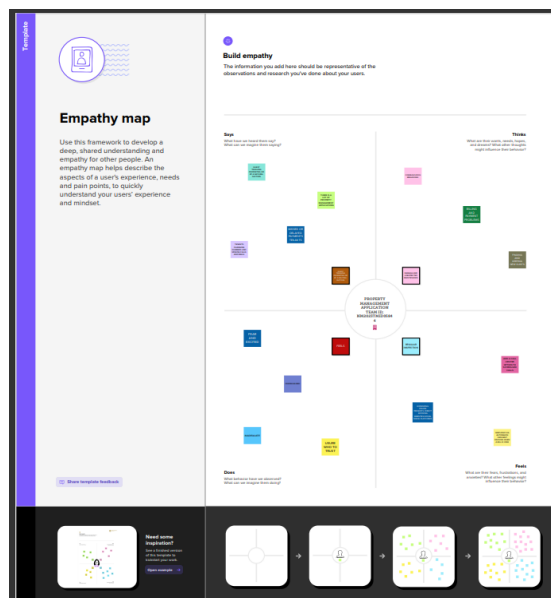
1. Property management is the overnight of real estate by a third party, normally a professional property manager or property management company.
2. Property managers can manage many different types of property residential, commercial, industrial and property for special purposes.

1.2 Purpose

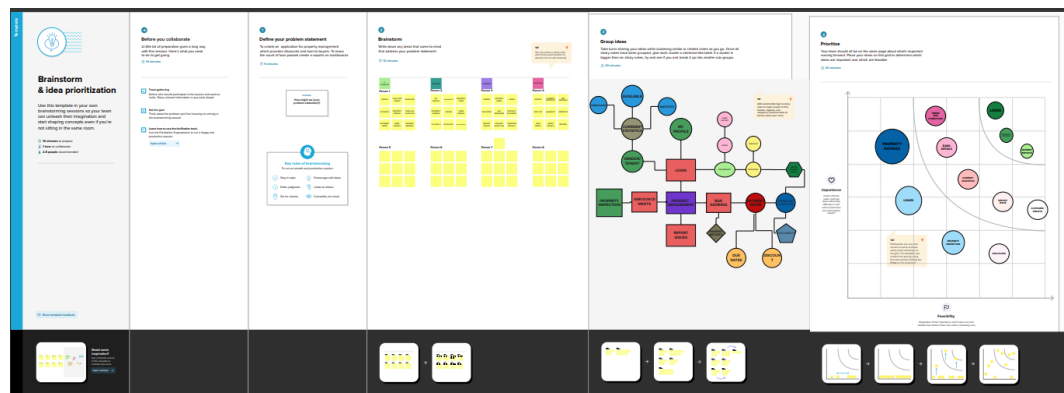
property management system gives you a clear view of what is going on in your business and provides simple steps that your team can easily follow to help grow your business.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

Object name	Fields in the Object	
obj1	Field label	Data type
	BUY	PICKLIST
	BUYERS	PICKLIST
obj2	Field label	Data type
	RENT	AUTONUMBER
	RENTS	AUTONUMBER
Obj3	Field label	Data type
	LOAN	AUTONUMBER
	LOANS	AUTONUMBER
Obj4	Field label	Data type
	LEAD	AUTO NUMBER
	LEADS	AUTO NUMBER

3.2 Activity & Screenshot

OBJECTS

1.LEAD

Setup

Home

Object Manager

Q Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

SETUP > 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

Details

Description

API Name
Lead__c

Custom

✓

Singular Label
Lead

Plural Label
Leads

Enable Reports

✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit

Delete

2.BUY

Setup

Home

Object Manager

Q Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

SETUP > OBJECT MANAGER

Buy

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

Details

Description

API Name
Buy__c

Custom

✓

Singular Label
Buy

Plural Label
Buyers

Enable Reports

✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit

Delete

3.LOAN

Setup

Home

Object Manager

Q Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

SETUP > OBJECT MANAGER

Loan

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

Details

Description

API Name
Loan__c

Custom

✓

Singular Label
Loan

Plural Label
Loans

Enable Reports

✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit

Delete

4.RENT

The screenshot shows the Salesforce Setup interface for the 'Rent' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area is titled 'Details' and includes fields for 'API Name' (Rent_c), 'Custom' (checked), 'Singular Label' (Rent), 'Plural Label' (Rents), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner.

TAB

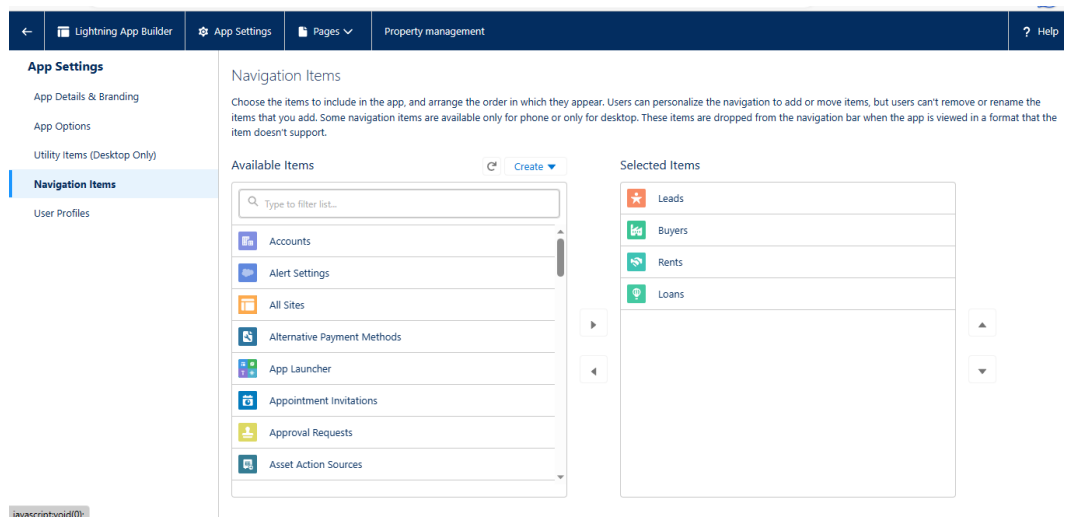
The screenshot shows the Salesforce Setup interface for 'Custom Tabs'. The left sidebar has a search bar with 'tab' entered and a list of options including 'User Interface', 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a description: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below this, there are three sections: 'Custom Object Tabs' (listing tabs for Buovers, Leads, Loans, and Rents), 'Web Tabs' (No Web Tabs have been defined), and 'Visualforce Tabs'.

APP MANAGER- LIGHGTENING APP

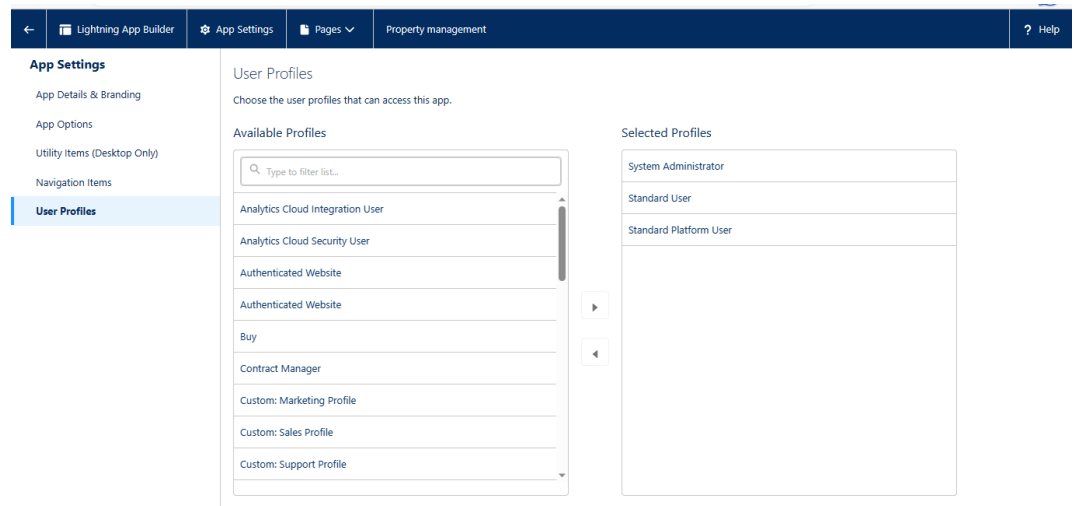
1. APP DETAILS AND BRANDING:

The screenshot shows the Salesforce App Manager interface for the 'Property management' app. The left sidebar contains a navigation menu with options like 'App Settings', 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes a description: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' Below this, there are two sections: 'App Details' (with fields for 'App Name', 'Developer Name', and 'Description') and 'App Branding' (with fields for 'Image', 'Primary Color Hex Value', and 'Org Theme Options'). There is also an 'App Launcher Preview' section showing the app's icon and name.

2.NAVIGATION DETAILS:

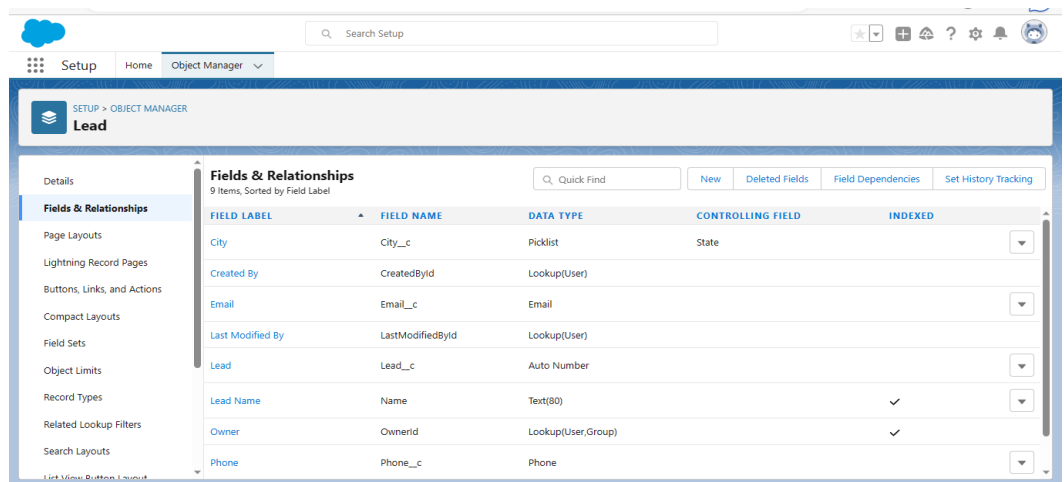


3.USER PROFILES:



FIELDS:

2. FIELD AND RELATIONSHIP - LEAD



3. FIELD AND RELATIONSHIP - BUY

Setup Setup Home Object Manager

Q Search Setup

SETUP > OBJECT MANAGER

Buy

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

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy	Buy__c	Picklist		
Buy Name	Name	Text(80)		✓
City	City__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
State	State__c	Picklist		

4. FIELD AND RELATIONSHIP - LOAN

Setup Setup Home Object Manager

Q Search Setup

SETUP > OBJECT MANAGER

Loan

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

Fields & Relationships

11 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Intrest Rate	Intrest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan Id	Loan_id__c	Auto Number		
Loan Name	Name	Text(80)		✓
Loan repayment	Loan_repayment__c	Number(18, 0)		

5. FIELD AND RELATIONSHIP - RENT

Setup Setup Home Object Manager

Q Search Setup

SETUP > OBJECT MANAGER

Rent

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

Fields & Relationships

7 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK type	BHK__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent	Rent__c	Auto Number		
Rent Name	Name	Text(80)		✓
Rental City	Rental_City__c	Text(70)		

PROFILES:

Setup Home Object Manager

Search Setup

pro

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Buy	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>

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Page 1 of 2

Setup Home Object Manager

Search Setup

pro

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Identity User	Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Partner Community User	Partner Community	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Sales Manager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>

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Page 2 of 2

USERS:

Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chathv.00d2w00000rlylead.qzkliaaxeo7@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	S.Thulasi	IS	thulasi@acw@college.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Thulasi S. Thulasi S	thul	thulasi@esureth@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User Integration	info	integration@00d2w00000rlylead.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2w00000rlylead.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

PERMISSION SETS:

Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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
Del Clone	Buy		Salesforce Platform
Clone	Buyer	Allows access to the store. Lets users see products and ca...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to ma...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Ama...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
Del Clone	Experience Profile Manager		Salesforce

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Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

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All Permission Sets Edit Delete Create New View

Action	Permission Set Label	Description	License
Clone	Subscription Management Collections Dashboard User	Give users visibility into collection status in a given timefra...	Analytics View Only Embedded App
Del Clone	Teacher Permission		Salesforce Platform

26-27 of 27 0 Selected Previous Next Page 2 of 2

SHARING SETTINGS

Setup Home Object Manager

Search Setup

SHARING

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

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	✓
Case	Public Read/Write/Transfer	Private	✓

SetupHomeObject Manager

SHARING

Security

Sharing Settings

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

Search Setup

Sharing Settings

Communication Subscription Consent	Private	Private	✓
Consumption Schedule	Public Read Only	Private	✓
Contact Point Address	Controlled by Parent	Controlled by Parent	✓
Contact Point Consent	Private	Private	✓
Contact Point Email	Controlled by Parent	Controlled by Parent	✓
Contact Point Phone	Controlled by Parent	Controlled by Parent	✓
Contact Point Type Consent	Private	Private	✓
Contact Request	Public Read/Write	Private	✓
Coupon	Private	Private	✓
Credit Memo	Public Read/Write	Private	✓
Customer	Private	Private	✓
Data Use Legal Basis	Private	Private	✓
Data Use Purpose	Private	Private	✓
Engagement Channel Type	Private	Private	✓
Finance Balance Snapshot	Private	Private	✓
Finance Transaction	Private	Private	✓
Flow Interview	Private	Private	✓
Flow Interview 1 min	Private	Private	✓

SetupHomeObject Manager

SHARING

Security

Sharing Settings

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

Search Setup

Sharing Settings

Promotion Segment	Private	Private	✓
Queue	Public Read/Write	Private	✓
Queued Party	Public Read/Write	Private	✓
Queue Messaging Template	Public Read/Write	Private	✓
Quick Text	Private	Private	✓
Quick Text Usage	Private	Private	✓
Return Order	Private	Private	✓
Scorecard	Private	Private	✓
Seller	Private	Private	✓
Service Appointment	Public Read/Write	Private	✓
Service Contract	Private	Private	✓
Service Resource	Public Read/Write	Private	✓
Service Territory	Public Read/Write	Private	✓
Shift	Private	Private	✓
Streaming Channel	Public Read/Write	Private	✓
User Provisioning Request	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓

SetupHomeObject Manager

SHARING

Security

Sharing Settings

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

Search Setup

Sharing Settings

Require permission to view record names in lookup fields

Sharing Rules

Lead Sharing Rules

No sharing rules specified.

Account Sharing Rules

No sharing rules specified.

Opportunity Sharing Rules

No sharing rules specified.

Case Sharing Rules

No sharing rules specified.

Campaign Sharing Rules

No sharing rules specified.

Setup

Home

Object Manager

SHARING

Security

Sharing Settings

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

SETUP

Sharing Settings

Work Type Sharing Rules

No sharing rules specified.

New Recalculate

Work Type Sharing Rules Help

Work Type Group Sharing Rules

No sharing rules specified.

New Recalculate

Work Type Group Sharing Rules Help

Buy Sharing Rules

No sharing rules specified.

New Recalculate

Buy Sharing Rules Help

Lead Sharing Rules

No sharing rules specified.

New Recalculate

Lead Sharing Rules Help

Loan Sharing Rules

No sharing rules specified.

New Recalculate

Loan Sharing Rules Help

Rent Sharing Rules

No sharing rules specified.

New Recalculate

Rent Sharing Rules Help

REPORTS:

Property management...

Leads

Leads

Rents

Buyers

Loans

Recently Viewed

Reports

REPORT

New Accounts Report

Accounts

Add Chart

Save & Run

Save

Close

Run

Outline

Filters

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

Update Preview Automatically

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

NEW LEAD WITH LOAN AMOUNT:

Property management...

Leads

Leads

Rents

Buyers

Loans

Recently Viewed

Reports

New Lead with Loan Amount

Dashboard

New Lead with Loan Amount

Property management

As of 26-Apr-2023, 3:22 pm Viewing as Thulasi S

Refresh

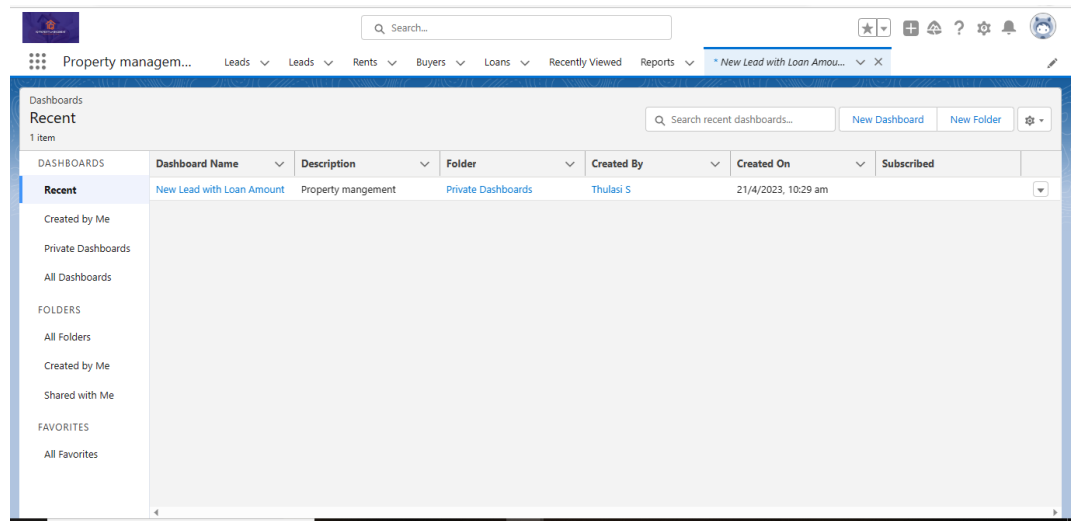
Edit

Subscribe

NewAccounts Report

Last Activity	Account Owner	Account Name	Billing State/Province	Type
-	Automated Process	Sample Account for Entitlements	-	-
-	Thulasi S	GenePoint	CA	Customer - Channel
-	Thulasi S	United Oil & Gas, UK	UK	Customer - Direct
-	Thulasi S	United Oil & Gas, Singapore	Singapore	Customer - Direct
-	Thulasi S	Edge Communications	TX	Customer - Direct
-	Thulasi S	Burlington Textiles Corp of America	NC	Customer - Direct
-	Thulasi S	Pyramid Construction Inc.	-	Customer - Channel
-	Thulasi S	Dickenson plc	KS	Customer - Channel
-	Thulasi S	Grand Hotels & Resorts Ltd	IL	Customer - Direct
-	Thulasi S	Express Logistics and Transport	OR	Customer - Channel
-	Thulasi S	University of Arizona	AZ	Customer - Direct

DASHBOARD:



4 Trailhead Profile Public URL

Team Lead - SUBHASHINI.J <https://trailblazer.me/id/subhj4>

Team Member 1 SUMAIYA.S-
<https://trailblazer.me/id/ssumaiyas>

Team Member 2 - THENMOZHI.R
<https://trailblazer.me/id/thenr121>

Team Member 3 – THULASI.S
<https://trailblazer.me/id/thuls11>



Project Report Template

5 ADVANTAGES & DISADVANTAGE

ADVANTAGES:

- Easy maintenance monitoring
- Easy payment from tenants and contractors
- Data tracking
- Tenant screening
- Quick inspection

DISADVANTAGES

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

6.APPLICATIONS

6. Build up

- 7. Easy storage solutions**
- 8. App folio property manager**
- 9. Rent direct**
- 10. In conquest**

7. CONCLUSION

In conclusion, Property management System (PMS) in software is very crucial all the hotels. Especially opera PMS constitutes the most appropriate PMS software for Hilton Athens. It is user friendly, connects with central reservation system (CRS), point of sale (POS) ETC..., and provides all the tools with hotel needs in order to operate effectively. The disadvantages of the opera PMS can be improved easily and as it was mentioned before a recommendation is the upgrade of opera V52 opera .

8. FUTURE SCOPE

- ✓ In recent years, the property management industry , once slow to adopt to new changes, has made a notable leap forward
- ✓ More than 847,000 people employed
- ✓ Over 282000 property management companies (in the us only)
- ✓ About \$ 88 billion in revenue generated per annum
- ✓ 16% of US GDP.