

Property Management Application Using Salesforce

1.INTRODUCTION

1.1 overview

A professional or a business that deal with the day to day responsibility of real estate is called a property manager. In this lesson, we will explore the role of a property manager in real estate.

1.2 Purpose

- Property manager: when real estate is neglected it is susceptible to damage and loss. To maintain homes and businesses, owners of real estate hire

property managers. In this lesson, we will explore the role of property managers in real estate.

- Property management Firms: for various reasons, property owners are hiring property management firms. Some Landlords may have many rental properties and deal with the tenants.

2. Problem Definition & Design Thinking

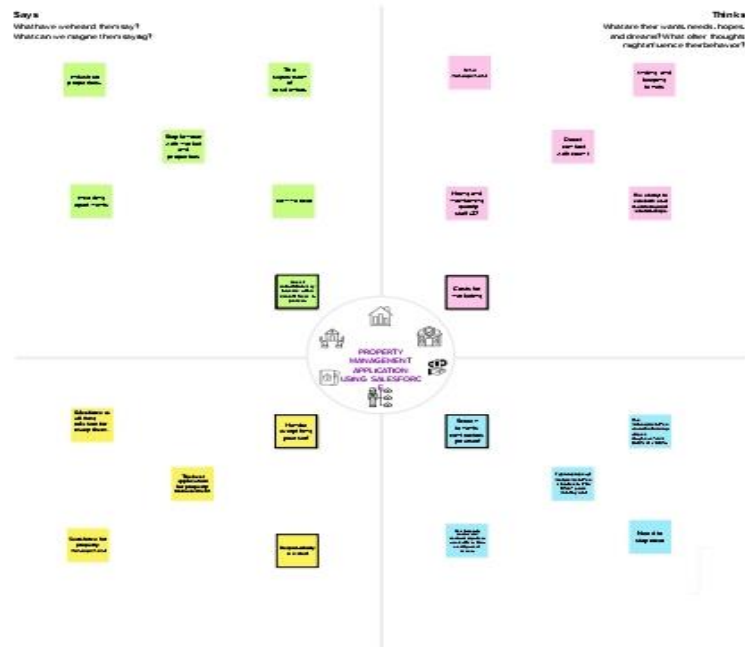
2.1 Empathy Map

Empathy map

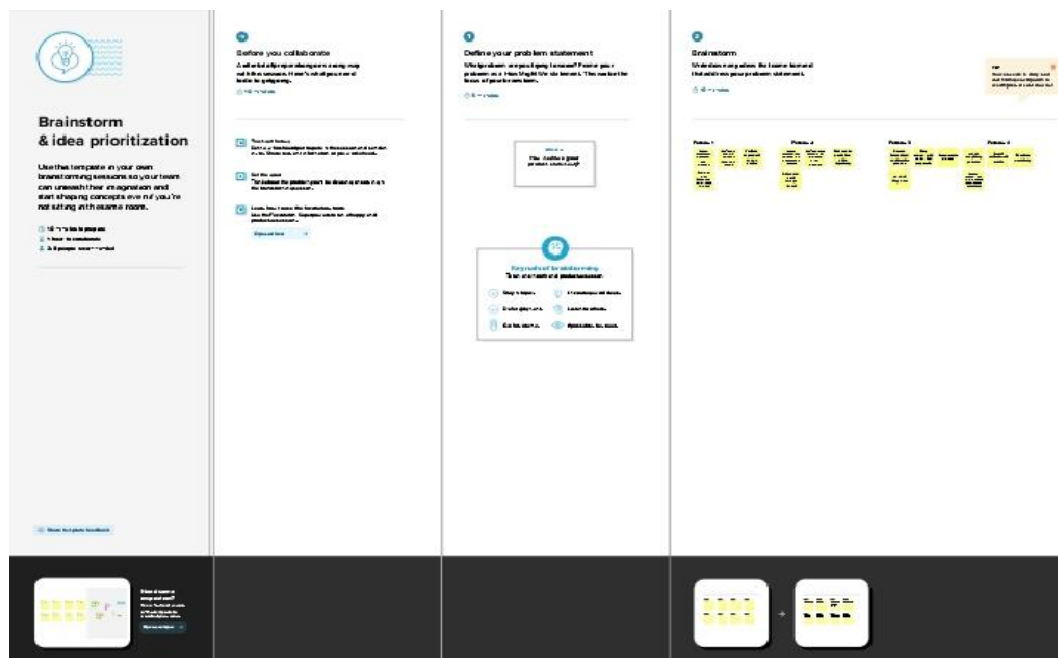
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

 Build empathy

The information you add here should be representative of the observations and research you've done about your users.



2.2 Ideation & Brainstorming Map



	Owner	Lookup(User, Group)
Offer	Field label	Data type
	Contact	Lookup(Contact)
	Offer Name	auto Number
	Property	Master-Detail(Property)
Property	Field label	Data type
	Owner	Lookup(User, Group)
	Property Name	Text(80,

Property Management

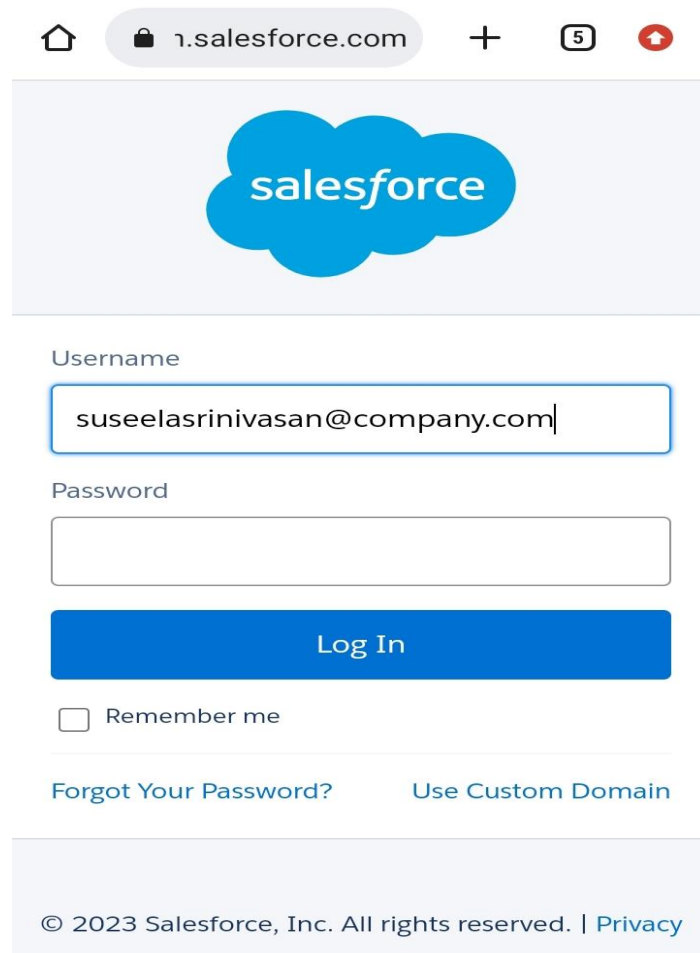
ACTIVITY AND SCREENSHOTS:

1.Creating Developer Account:

Creating a developer org in salesforce.

Go to Link Click on sign up. On the sign up form, enter the following details
First name & Last name, Email, Role : Developer, Company : College Name, County : India
Postal Code : pin code ,Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format [username@organization.com](#) Click on sign up after filling these.



The screenshot shows the Salesforce login page in a web browser. The browser's address bar displays '1.salesforce.com'. The page features the Salesforce logo at the top. Below the logo, there is a 'Username' label and a text input field containing 'suseelasrinivasan@company.com'. Underneath the username field is a 'Password' label and an empty password input field. A blue 'Log In' button is positioned below the password field. At the bottom left, there is a checkbox labeled 'Remember me'. At the bottom right, there are two links: 'Forgot Your Password?' and 'Use Custom Domain'. The footer of the page states '© 2023 Salesforce, Inc. All rights reserved. | Privacy'.

Username

suseelasrinivasan@company.com

Password

Log In

☐ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

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2.Create Custom Object

The screenshot shows the 'Edit Custom Object' page for the 'Buy' object. The left sidebar contains a 'Details' menu with options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The main content area is titled 'Custom Object Definition Edit' and includes a 'Custom Object Information' section. This section contains fields for 'Label' (Buy), 'Plural Label' (Buyers), 'Starts with vowel sound' (checkbox), 'Object Name' (Buy), and 'Description'. A 'Required Information' indicator is present. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

3.Create Tab

The screenshot shows the 'Custom Tabs' page in the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered and a 'User Interface' section with 'Rename Tabs and Labels' and 'Tabs' options. The main content area is titled 'Custom Tabs' and includes a 'Custom Object Tabs' table. The table has columns for 'Action', 'Label', 'Tab Style', and 'Description'. It lists several tabs: 'Buyers' (Car), 'Energy Assets' (Compass), 'Leads' (Bottle), and 'Realty' (Bank). Below the table is a 'Web Tabs' section with a 'New' button and a 'What Is This?' link. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

4 . The Lightning App

The screenshot shows the 'App Manager' page in the Salesforce Setup interface. The left sidebar has a search bar with 'app manager' entered and an 'Apps' section with 'App Manager' option. The main content area is titled 'App Manager' and includes a table of installed apps. The table has columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', 'Version', and 'Status'. It lists 22 items, including 'Bolt Solutions', 'Queue Management', 'Site.com', 'Analytics Studio', 'Marketing', 'App Launcher', 'Service Console', 'Sales Console', 'All Tabs', and 'property management'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

Setup

Home

Object Manager

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

Search Setup

Lead Custom Field

Lead

Back to Lead Fields

Validation Rules

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Custom Field Definition Detail

Field Information

Field Label	Lead	Object Name	Lead
Field Name	Lead	Data Type	Text Area
API Name	Lead__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By

Susmita.Srinivasan

19/04/2023, 10:43 pm

Modified By

Susmita.Srinivasan

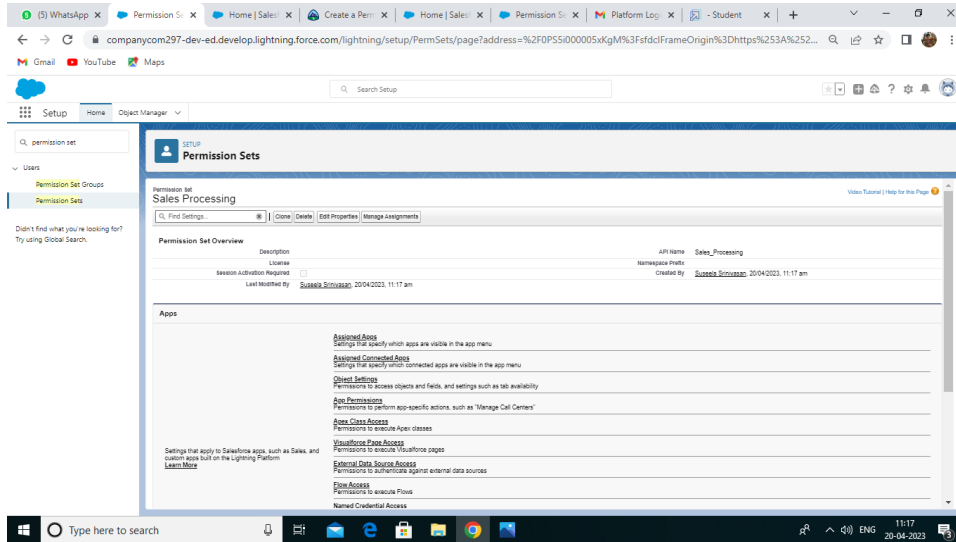
20/04/2023, 10:04 am

General Options

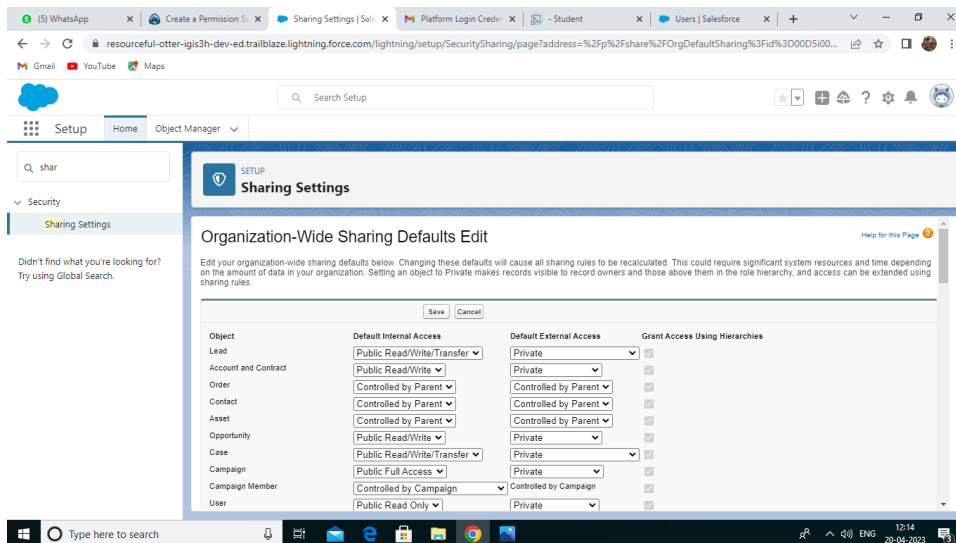
Required ☐

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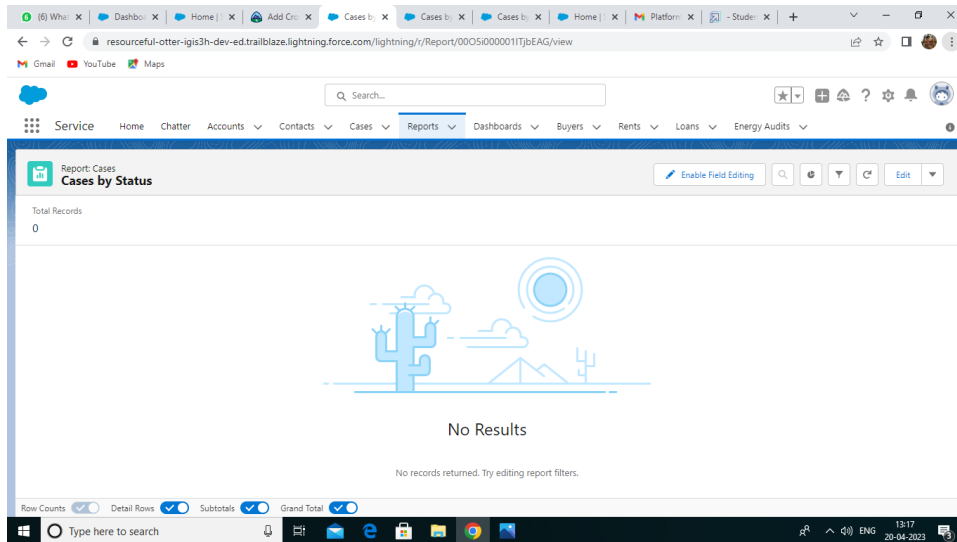
8.Create The Permission Sets



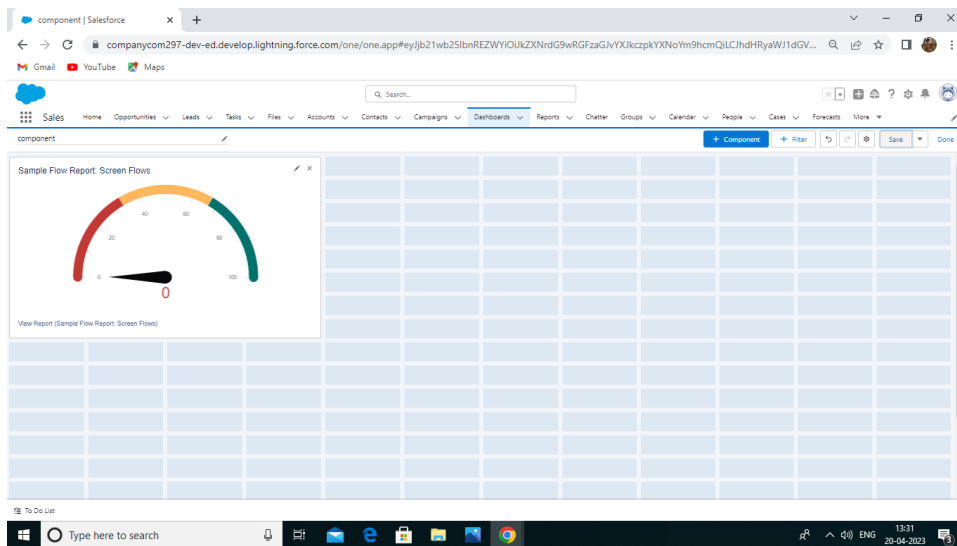
9.Setup For OWD



10.Create Report



11.Dashboards



4 Trailhead Profile Public URL

Team lead - <https://trailblazer.me/id/ssrinivasan157>

Team Member1 – <https://trailblazer.me/id/skamaraj13>

Team Member2 – <https://trailblazer.me/id/sswathi70>

Team Member3 - <https://trailblazer.me/id/ppriya337>

5 ADVANTAGES & DISADVANTAGE

Advantages:

1 . A major advantage of a property management system in a hotel is having access to all of your information in one place, whether you're onsite, at home or out of town.

2. The number one job of an employee in the hospitality industry is to provide excellent customer service to guests. When employees spend hours on routine tasks such as reservation management, scheduling, housekeeping assignments, maintenance requests and other manual administrative tasks, guest services can suffer.

3 . No one wants to arrive at their hotel after a long day of traveling only to be greeted with an awkward or burdensome check-in process. A property management system provides a single, efficient check-in procedure, requiring each of your employees to follow the same streamlined process.

Disadvantages:

1 . Property management systems allow you to connect every aspect of your business through one application. However, this may make it more difficult to use other third-party products that may be more useful to your business, such as payroll or accounting programs.

2 . For larger hotels, relying on property management software that claims to do everything can be a hassle and may actually require you to purchase other products or services. Software products usually perform one to three core functions very well. For instance, your chosen property management system may do a very good job of collecting and organizing bookings, assigning staff and keeping an up-to-date, rotating log of maintenance requests.

Conclusion:

In conclusion, Property Management System (PMS) software is very crucial for 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 the hotel needs in order to operate effectively.