

Project Report

Property Management Application

1 INTRODUCTION

1.1 Overview

A property management application using Sales force is a system that allows property managers to manage their properties, tenants, and leases through the Sales force platform. The application can help property managers automate processes, track important data, and improve their overall property management workflow.

Here are some of the key features that a property management application using Sales force:

- ❖ **Property management dashboard:** This provides a quick overview of important metrics such as occupancy rates, rental income, and maintenance requests.
- ❖ **Tenant management:** This allows property managers to manage tenant information, such as contact details, lease agreements, and payment history.
- ❖ **Maintenance management:** This feature enables property managers to track and manage maintenance requests, assign tasks to maintenance staff, and monitor progress.
- ❖ **Lease management:** This feature allows property managers to manage lease agreements, track payment schedules, and set renewal reminders.

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- ❖ **Financial management:** This enables property managers to track rental income, expenses, and generate financial reports.
- ❖ **Communication management:** This feature provides a central platform for property managers to communicate with tenants, staff, and other stakeholders.

A property management application using Sales force can be customized to meet the specific needs of a property management company. It can also integrate with other Sales force applications, such as Sales Cloud and Service Cloud, to create a comprehensive property management solution

1.2 Purpose

The purpose of a property management application using Sales force is to streamline and automate the property management workflow, making it easier for property managers to manage their properties, tenants, and leases. By using the Sales force platform, property manager can take advantage of its powerful features, such as automation, analytics, and integration with other Sales force applications, to improve their overall efficiency and productivity.

Here are some of the specific purposes of a property management application:

- ❖ **To centralize property management data:** The application provides a single platform for property managers to store and manage all their property-related data, including tenant information, lease agreements, maintenance requests, and financial records.
- ❖ **To automate property management processes:** The application can automate repetitive tasks, such as lease renewals and rent collection, freeing up property managers to focus on more strategic activities.

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- ❖ **To improve communication with tenants:** The application provides a centralized platform for property managers to communicate with tenants, making it easier to address their concerns and respond to their requests.
- ❖ **To optimize property maintenance:** The application allows property managers to track and manage maintenance requests, ensuring that repairs are completed promptly and efficiently.
- ❖ **To generate actionable insights:** The application provides analytics and reporting tools that can help property managers identify trends, optimize rental income, and make data-driven decisions.

Overall, the purpose of a property management application using Sales force is to provide property managers with a comprehensive solution that can help them improve their efficiency, productivity, and tenant satisfaction.

2 Problem Definition & Design Thinking

2.1 Empathy Map

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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.

Says
What do you hear about them saying?
What do you imagine them saying?

Coordinate and oversee maintenance and repair tasks

Respond promptly and professionally to tenant concerns

Prioritize tenant satisfaction and retention

Monitor financials and create reports

Hire and train new team members

Connectivity & Infrastructure

Property well-maintained

Unusually high listings and vacancies

Maintenance charges

Good relationship with the Owner

Rental Agreement & Written Agreement

Property Taxes

Concern for tenant satisfaction and well-being

Pride in maintaining and improving properties

Stress from managing multiple properties and tasks

Satisfaction from successfully resolving tenant issues

Pressure to meet financial targets and maintain profitability

Desire to stay informed and knowledgeable about the industry

Check the (G)overnment Certificate

The first deciding factor should be the location of the property

Lease Agreement

Location is first


Water Facility & Know Facility

Transport Facility


Budget Consideration

Does
What do I believe I am experiencing?
What can we imagine them doing?

Feels
What do they think about the situation?
What do they think about the situation?
What do they think about the situation?

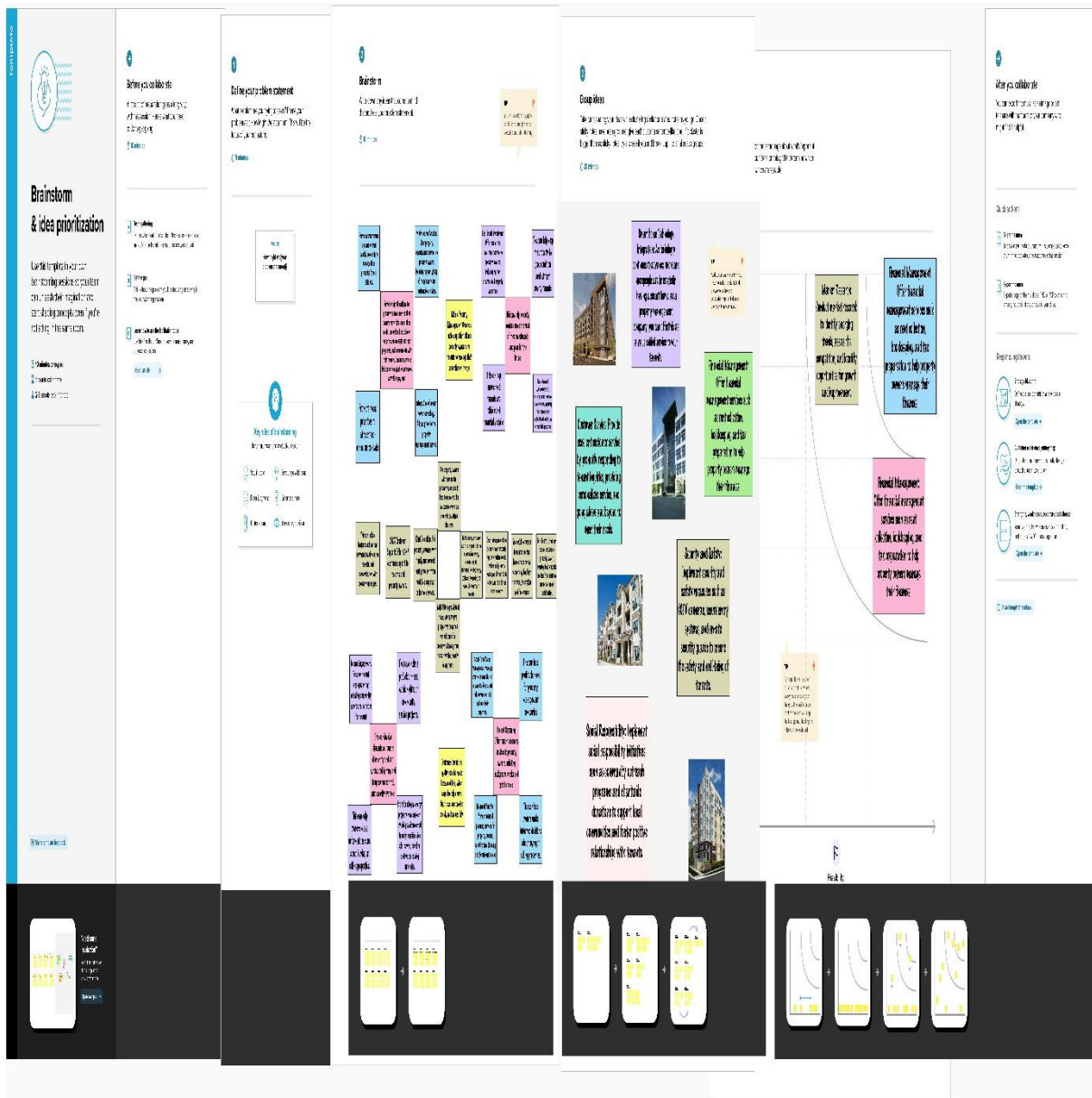


Need some inspiration?
See a template version of this empathy map.
Open example



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2.2 Ideation & Brainstorming Map



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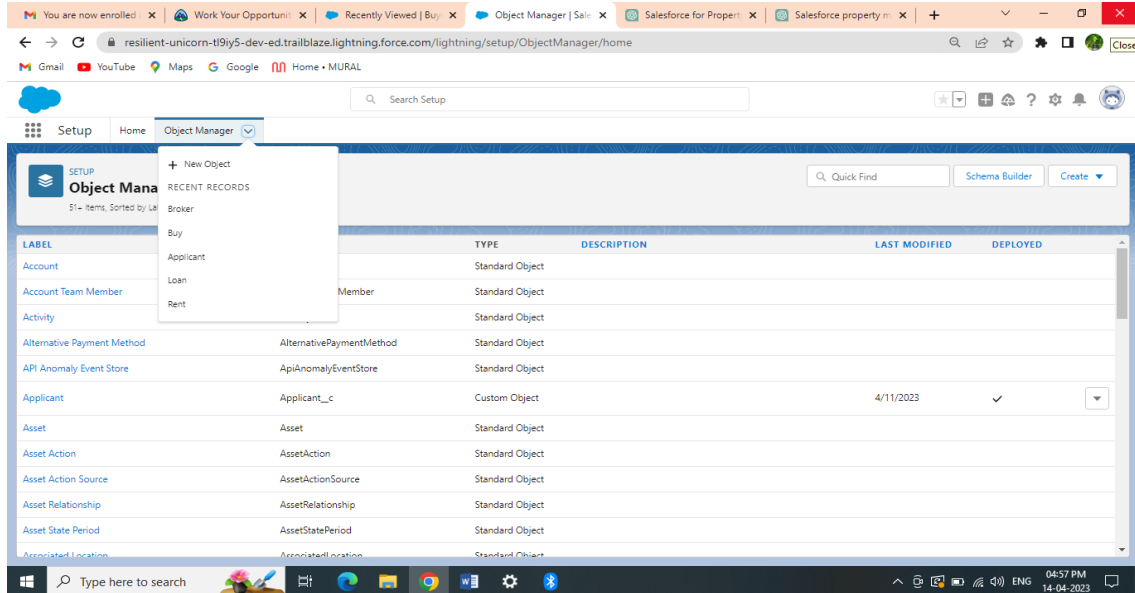
3 RESULTS

3.1 Data Model:

OBJECT NAME	FIELD NAME	DATA TYPE
Buy	<ul style="list-style-type: none"> ❖ Create property ❖ Type ❖ Discount ❖ State ❖ City 	<ul style="list-style-type: none"> ❖ Pick list ❖ Percentage ❖ Pick list ❖ Pick list
Rent	<ul style="list-style-type: none">  Rent  Rental city  BHK type 	<ul style="list-style-type: none">  Auto Number  Text  Pick list
Loan	<ul style="list-style-type: none"> ➤ Loan Id ➤ Interest Rate ➤ Term ➤ Annual Loan ➤ Total Loan Installment ➤ Loan Repayment ➤ Loan Amount 	<ul style="list-style-type: none"> ➤ Auto number ➤ Currency ➤ Number ➤ Number ➤ Number ➤ Number ➤ Formula

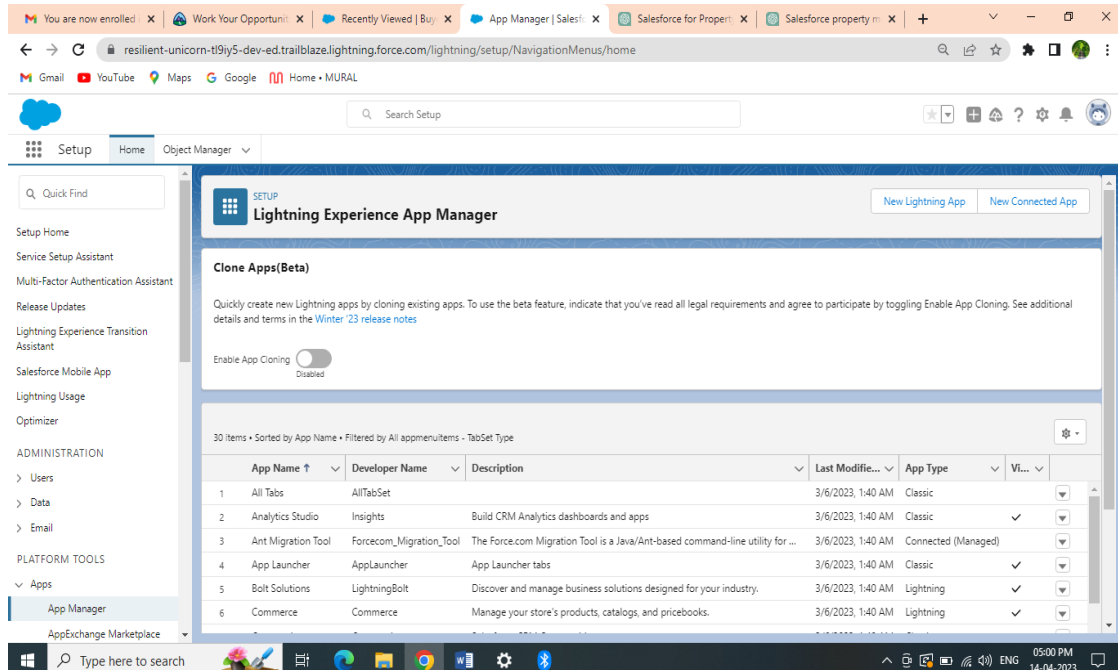
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3.2 Activity & Screenshot



The screenshot shows the Salesforce Object Manager setup page. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area displays a table of objects with columns: LABEL, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. A dropdown menu is open under the 'Object Manager' tab, showing options like 'New Object', 'Recent Records', and a list of objects including Account, Account Team Member, Activity, Alternative Payment Method, API Anomaly Event Store, Applicant, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, and Associated Location.

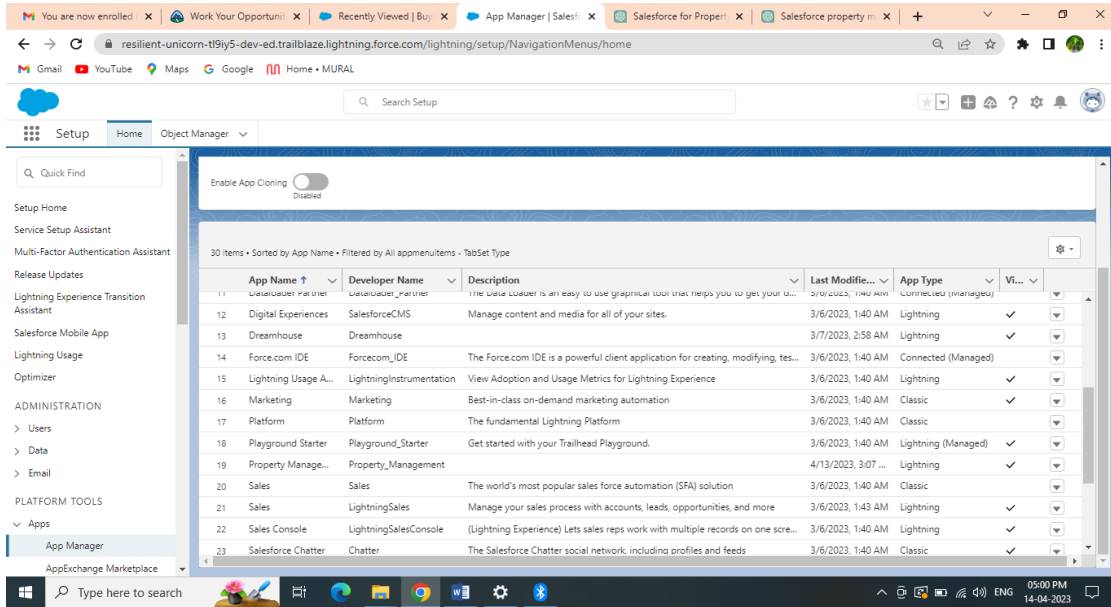
LABEL	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Standard Object			
Account Team Member	Standard Object			
Activity	Standard Object			
Alternative Payment Method	Standard Object	AlternativePaymentMethod		
API Anomaly Event Store	Standard Object	ApiAnomalyEventStore		
Applicant	Custom Object	Applicant_c	4/11/2023	✓
Asset	Standard Object	Asset		
Asset Action	Standard Object	AssetAction		
Asset Action Source	Standard Object	AssetActionSource		
Asset Relationship	Standard Object	AssetRelationship		
Asset State Period	Standard Object	AssetStatePeriod		
Associated Location	Standard Object	AssociatedLocation		



The screenshot shows the Salesforce Lightning Experience App Manager. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area displays the 'Clone Apps(Beta)' section, which includes a toggle for 'Enable App Cloning' (currently disabled) and a table of apps. The table has columns: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table lists 6 items, including All Tabs, Analytics Studio, Ant Migration Tool, App Launcher, Bolt Solutions, and Commerce.

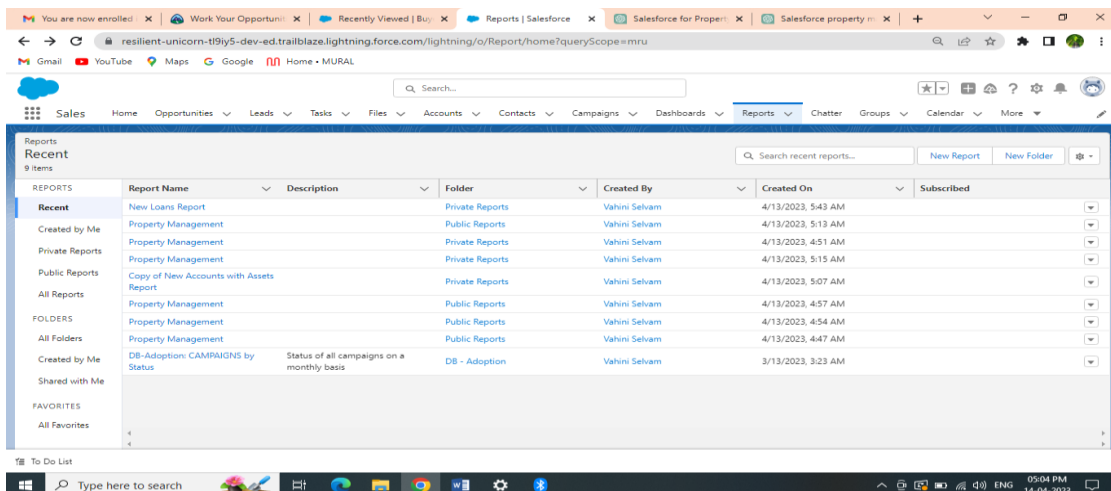
App Name	Developer Name	Description	Last Modified	App Type	Visibility
1 All Tabs	AllTabSet		3/6/2023, 1:40 AM	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	3/6/2023, 1:40 AM	Classic	✓
3 Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration Tool is a Java/Ant-based command-line utility for ...	3/6/2023, 1:40 AM	Connected (Managed)	✓
4 App Launcher	AppLauncher	App Launcher tabs	3/6/2023, 1:40 AM	Classic	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	3/6/2023, 1:40 AM	Lightning	✓
6 Commerce	Commerce	Manage your store's products, catalogs, and pricebooks.	3/6/2023, 1:40 AM	Lightning	✓

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The screenshot shows the Salesforce App Manager interface. The left sidebar contains navigation links for Setup, Home, Object Manager, and various setup assistants. The main content area displays a table of installed apps, sorted by App Name. The table includes columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. Below the table, there is a section for 'Enable App Cloning' which is currently disabled.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
11	Visualforce Partner	The Visualforce Partner is an easy to use graphical tool that helps you to get your...	3/6/2023, 1:40 AM	Connected (managed)	
12	Digital Experiences	Manage content and media for all of your sites.	3/6/2023, 1:40 AM	Lightning	✓
13	Dreamhouse		3/7/2023, 2:58 AM	Lightning	✓
14	Force.com IDE	The Force.com IDE is a powerful client application for creating, modifying, tes...	3/6/2023, 1:40 AM	Connected (Managed)	
15	Lightning Usage A...	View Adoption and Usage Metrics for Lightning Experience	3/6/2023, 1:40 AM	Lightning	✓
16	Marketing	Best-in-class on-demand marketing automation	3/6/2023, 1:40 AM	Classic	✓
17	Platform	The fundamental Lightning Platform	3/6/2023, 1:40 AM	Classic	✓
18	Playground Starter	Get started with your Trailhead Playground.	3/6/2023, 1:40 AM	Lightning (Managed)	✓
19	Property Manage...		4/13/2023, 3:07 ...	Lightning	✓
20	Sales	The world's most popular sales force automation (SFA) solution	3/6/2023, 1:40 AM	Classic	
21	Sales	Manage your sales process with accounts, leads, opportunities, and more	3/6/2023, 1:43 AM	Lightning	✓
22	Sales Console	(Lightning Experience) Lets sales reps work with multiple records on one scre...	3/6/2023, 1:40 AM	Lightning	✓
23	Salesforce Chatter	The Salesforce Chatter social network, including profiles and feeds	3/6/2023, 1:40 AM	Classic	✓



The screenshot shows the Salesforce Reports interface. The left sidebar contains navigation links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The main content area displays a table of recent reports, sorted by Report Name. The table includes columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. Below the table, there is a section for 'To Do List'.

Report Name	Description	Folder	Created By	Created On	Subscribed
Recent					
New Loans Report		Private Reports	Vahini Selvam	4/13/2023, 5:43 AM	
Property Management		Public Reports	Vahini Selvam	4/13/2023, 5:13 AM	
Property Management		Private Reports	Vahini Selvam	4/13/2023, 4:51 AM	
Property Management		Private Reports	Vahini Selvam	4/13/2023, 5:15 AM	
Copy of New Accounts with Assets Report		Private Reports	Vahini Selvam	4/13/2023, 5:07 AM	
Property Management		Public Reports	Vahini Selvam	4/13/2023, 4:57 AM	
Property Management		Public Reports	Vahini Selvam	4/13/2023, 4:54 AM	
Property Management		Public Reports	Vahini Selvam	4/13/2023, 4:47 AM	
DB-Adoption: CAMPAIGNS by Status	Status of all campaigns on a monthly basis	DB - Adoption	Vahini Selvam	3/13/2023, 3:23 AM	

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4 Trailhead Profile Public URL

Team Lead	-	https://trailblazer.me/id/vselvam15
Team Member 1	-	https://trailblazer.me/id/gok2023
Team Member 2	-	https://trailblazer.me/id/jan2003
Team Member 3	-	https://trailblazer.me/id/mmythili1

5 ADVANTAGES & DISADVANTAGE :

ADVANTAGES OF PROPERTY MANAGEMENT :

- **Improved efficiency:** Property management applications can help property managers to improve their efficiency by automating repetitive tasks such as rent collection, maintenance requests, and lease renewals. This can free up time for property managers to focus on more strategic tasks.
- **Enhanced communication:** Property management applications can improve communication between property managers, tenants, and landlords. This can help to ensure that everyone is on the same page and can prevent misunderstandings.
- **Centralized information:** Property management applications can provide a central location for all property-related information, such as tenant information, lease agreements, and maintenance requests. This can make it easier for property managers to access and manage this information.
- **Better tenant management:** Property management applications can help property managers to track tenant information, including lease agreements, rent payments, and maintenance requests. This can help property managers to provide better service to tenants.

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- **Improved financial management:** Property management applications can help property managers to manage their finances more effectively by providing tools to track expenses, generate financial reports, and manage rent payments.

DISADVANTAGES OF PROPERTY MANAGEMENT :

- ❖ **Initial setup costs:** Implementing a property management application can involve significant initial costs, including software licensing fees and hardware costs.
- ❖ **Learning curve:** Property management applications can be complex, and it may take time for property managers and staff to learn how to use them effectively.
- ❖ **Technical issues:** Like any software, property management applications can experience technical issues, such as software bugs or server downtime. These issues can disrupt the smooth operation of property management processes.
- ❖ **Security risks:** Property management applications may store sensitive information, such as tenant information and financial data. If not properly secured, this information may be vulnerable to data breaches.
- ❖ **Integration challenges:** Integrating a property management application with other software systems, such as accounting software, can be challenging and may require additional development work.

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6 APPLICATIONS

Sales force is a customer relationship management (CRM) platform that can also be used to manage properties. Here are some of the applications of Sales force in property management:

- ❖ **Tenant management:** Sales force can be used to manage tenant information, including contact details, lease agreements, and rent payments. This can help property managers to provide better service to tenants by having all the necessary information in one place.
- ❖ **Maintenance management:** Sales force can be used to track maintenance requests, assign work orders to maintenance staff, and monitor the progress of maintenance tasks. This can help property managers to ensure that maintenance is carried out in a timely and efficient manner.
- ❖ **Financial management:** Sales force can be used to manage finances related to properties, including rent payments, invoices, and expenses. This can help property managers to track their financial performance and generate reports to analyze their financial situation.
- ❖ **Marketing and sales:** Sales force can be used to manage leads, prospects, and sales related to properties. This can help property managers to track their sales pipeline and close deals more efficiently.
- ❖ **Reporting and analytics:** Sales force provides powerful reporting and analytics tools that can be used to track key performance indicators (KPIs) related to property management, such as occupancy rates, rental income, and maintenance costs.

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Overall, using Sales force for property management can provide a centralized platform for property managers to manage all aspects of their properties, from tenant management to financial management and beyond.

7 CONCLUSIONS

- ✚ In conclusion, property management applications can be a valuable tool for property managers to streamline their operations and improve their efficiency. These applications can help to automate repetitive tasks, provide a central location for property-related information, and improve communication between property managers, tenants, and landlords.
- ✚ While there are some disadvantages to using property management applications, such as initial setup costs and technical issues, the benefits outweigh the drawbacks. Property management applications can help property managers to manage their properties more effectively, provide better service to tenants, and improve their financial performance
- ✚ Sales force is one example of a platform that can be used for property management. By leveraging Sales force's powerful CRM tools, property managers can manage all aspects of their properties, from tenant management to financial management and beyond. Overall, property management applications can be a valuable asset for property managers looking to improve their operations and deliver better service to their tenants.

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8 FUTURE SCOPES

The future scope of property management applications using Sales force is promising, as the platform continues to evolve and improve its features and functionalities. Here are some potential areas of growth and development for property management applications using Sales force

- **Artificial intelligence (AI) and machine learning:** Sales force is already leveraging AI and machine learning to provide predictive analytics and other advanced features. In the future, property management applications using Sales force may be able to use these technologies to optimize maintenance schedules, predict tenant behavior, and provide more personalized service to tenants.
- **Internet of Things (IoT) integration:** As more properties are equipped with IoT devices, property management applications using Sales force may be able to integrate with these devices to provide real-time data on things like energy usage, temperature, and security.
- **Mobile optimization:** Sales force is already optimized for mobile devices, but future property management applications using Sales force may be even more mobile-friendly, allowing property managers to access property information from anywhere.
- **Enhanced collaboration:** As property management becomes more collaborative, property management applications using Sales force may be able to provide more advanced tools for communication and collaboration between property managers, tenants, and landlords.

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- **Data privacy and security:** As data privacy and security continue to be a concern, property management applications using Sales force may need to implement even more advanced security measures to protect sensitive property and tenant information .

Overall, the future scope of property management applications using Sales force is bright, as the platform continues to evolve and innovate. By leveraging the latest technologies and features, property managers can use Sales force to optimize their operations, provide better service to tenants, and stay ahead of the competition.