

Date	18 th April 2023
Team ID	NM2023TMIDI6760
Project Name	PROPERTY MANAGEMENT APPLICATION USING SALESFORCE
Team Leader	VAISHNAVI K
Team Member	AARTHI M ABARNA A ABITHA K

1. INTRODUCTION

1.1 Overview

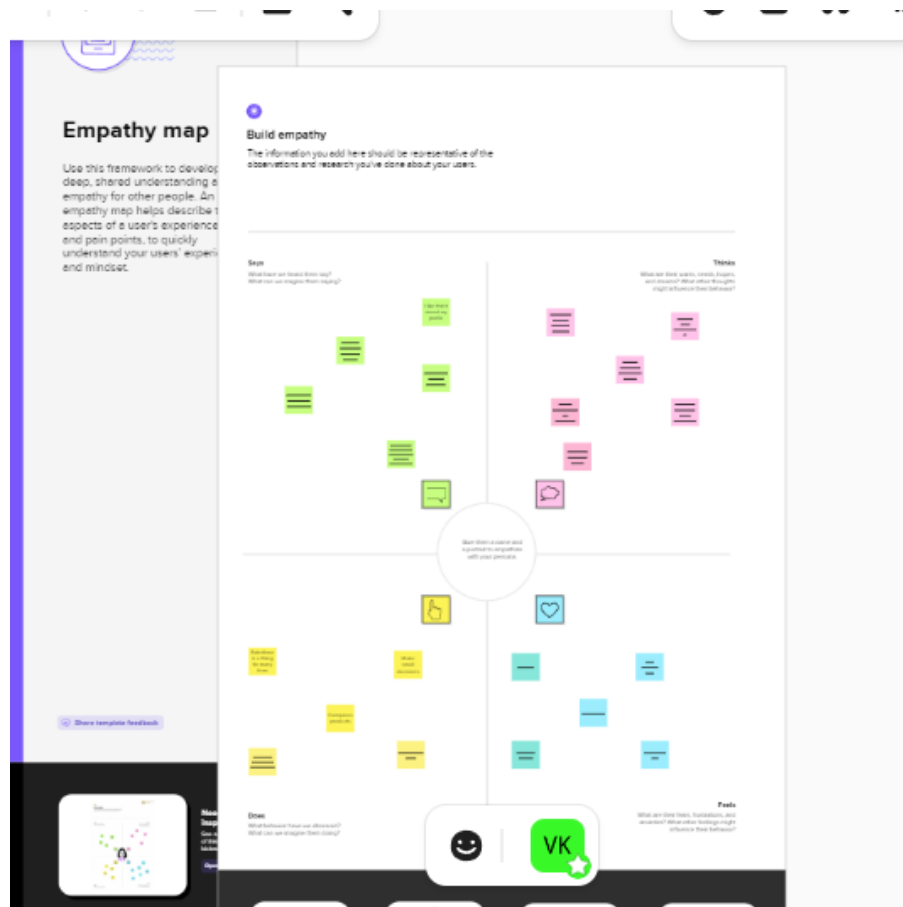
- Property Management is the oversight of real estate by a third party
- Property Managers can manage various types of property
- Residential, commercial, industrial and property for special purpose

1.2 Purpose

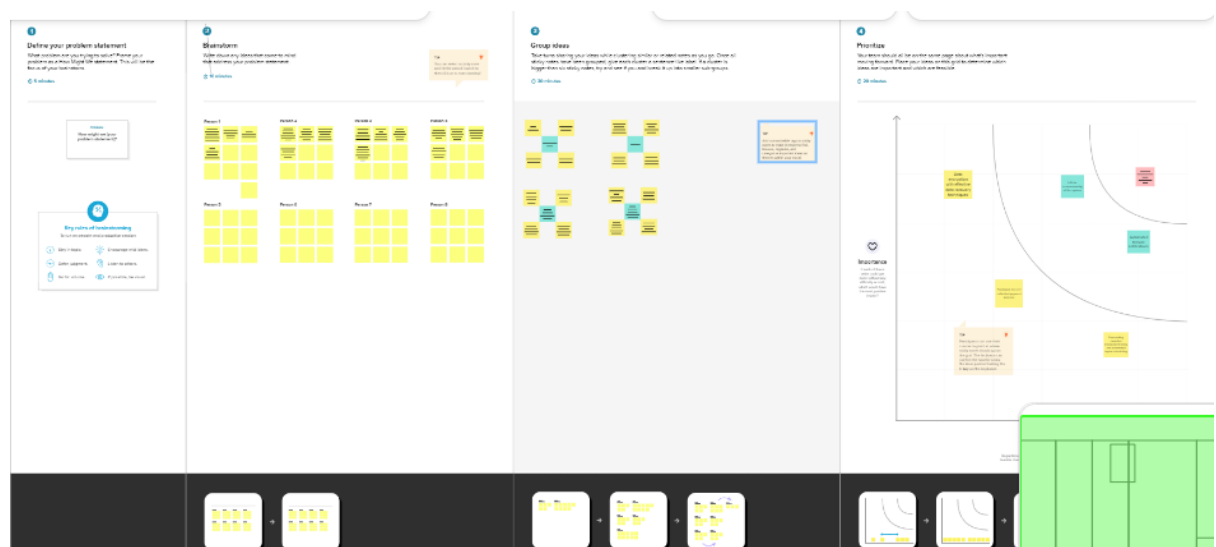
- Telephone system
- Point of sale(pos)integration
- Event planning
- Food and beverage costing
- Hotel inventory supply management

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



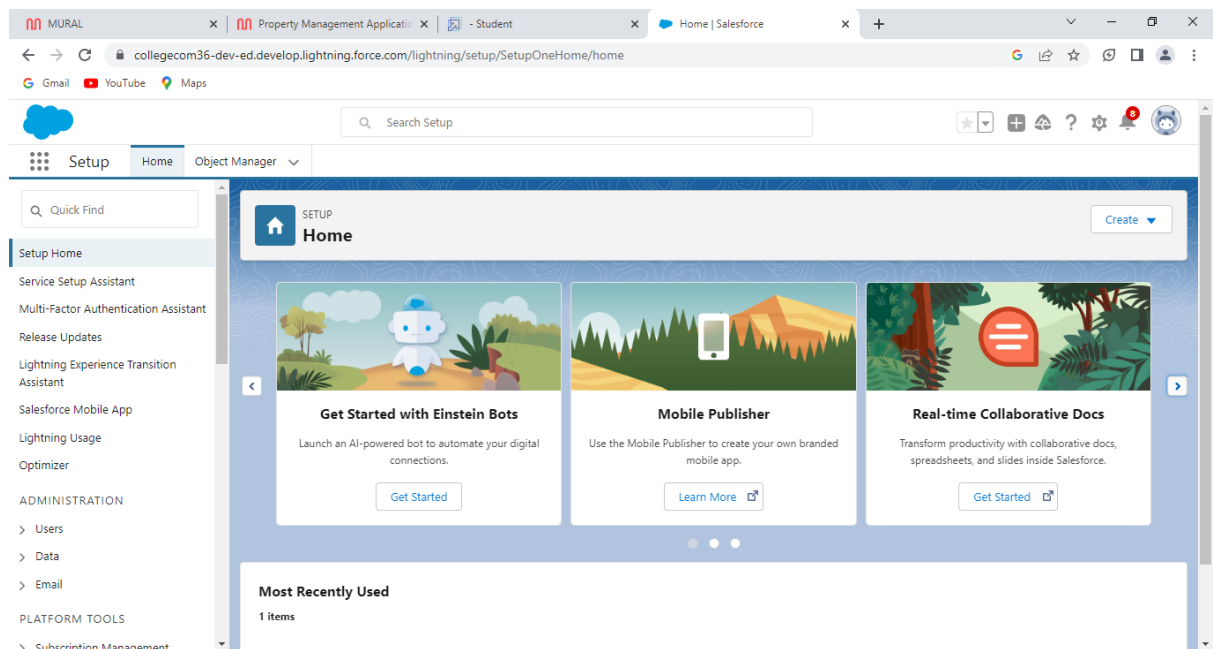
3 RESULT

3.1 Data Model

Object Name	Fields in the Object	
Buy	Field label	Data Type
	Property type Discount State City	Picklist percentage Picklist Dependency
Rent	Rent Rental rate BHK type	Auto number Any City Picklist
Loan	Loan ID Interest Rate Term Annual Loan Loan Amount	Auto number Currency Number Data type Formula

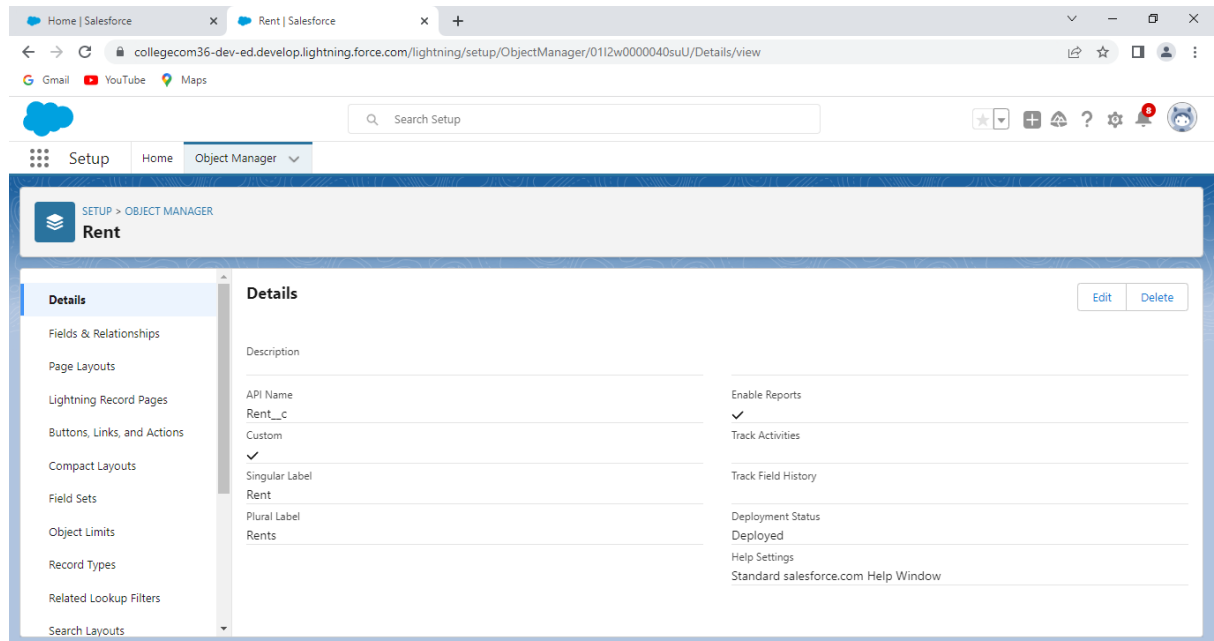
3.2 Activity & Screenshot

Milestone 1:



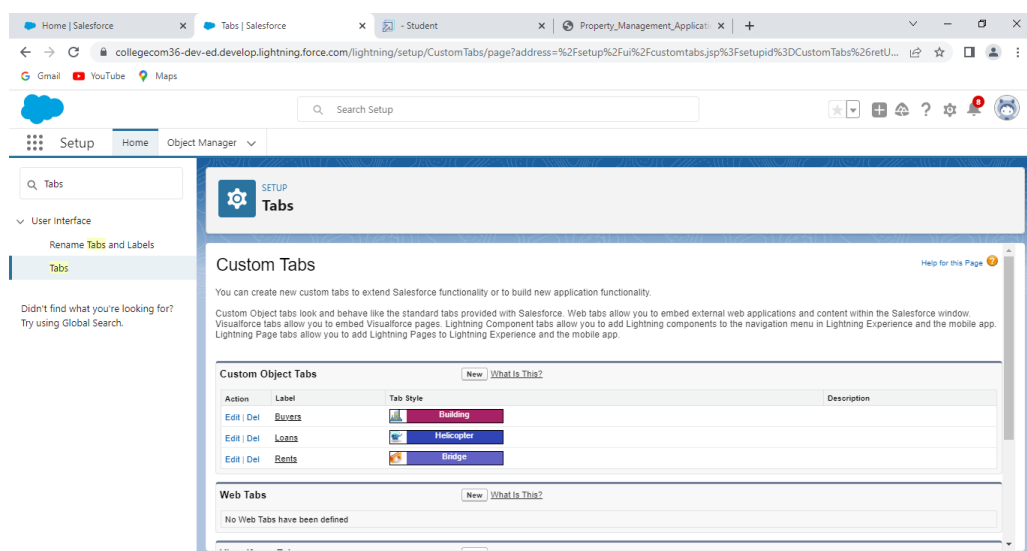
Creation of Salesforce Account

Milestone 2:



Creations of objects

Milestone 3:



Creation of tab

Milestone 4:

Lightning Experience App Manager

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

23 items • Sorted by App Name • Filtered by All appmenuitems • TabSet Type

	App Name	Developer Name	Description	Last Modified	Ap...	VI...
1	All Tabs	AllTabSet		03/03/2023, 10:43 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	03/03/2023, 10:43 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	03/03/2023, 10:43 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	03/03/2023, 10:46 am	Lightning	✓

Creation of Lighting tab

Milestone 5:

Setup > OBJECT MANAGER

User

Details

Fields & Relationships

32+ Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
About Me	AboutMe	Text Area(1000)		
Active	IsActive	Checkbox		✓
Address	Address	Address		
Admin Info Emails	ReceivesAdminInfoEmails	Checkbox		
Alias	Alias	Text(8)		✓
Allow Forecasting	ForecastEnabled	Checkbox		
Banner Photo	BannerPhotoId	Lookup(Photo)		
Call Center	CallCenterId	Lookup(Call Center)		✓
Chatter Email Highlights Frequency	DigestFrequency	Picklist		

Creation of Fields

Milestone 6:

The screenshot shows the Salesforce Setup interface for the 'test and user' profile. The left sidebar contains a search bar with 'profiles' and a list of navigation items: Users, Profiles, and a search result for 'profiles'. The main content area is titled 'Profiles' and includes a 'Profile' section for 'test and user'. Below this, there is a 'Profile Detail' table and a 'Page Layouts' table.

Profile Detail	
Name	test and user
User License	Analytics Cloud Integration User
Description	
Created By	Vaishnavi K. 14/04/2023, 4:52 pm
Modified By	Vaishnavi K. 14/04/2023, 4:58 pm

Page Layouts	
Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Object Milestone	Object Milestone Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Maps	Maps Default

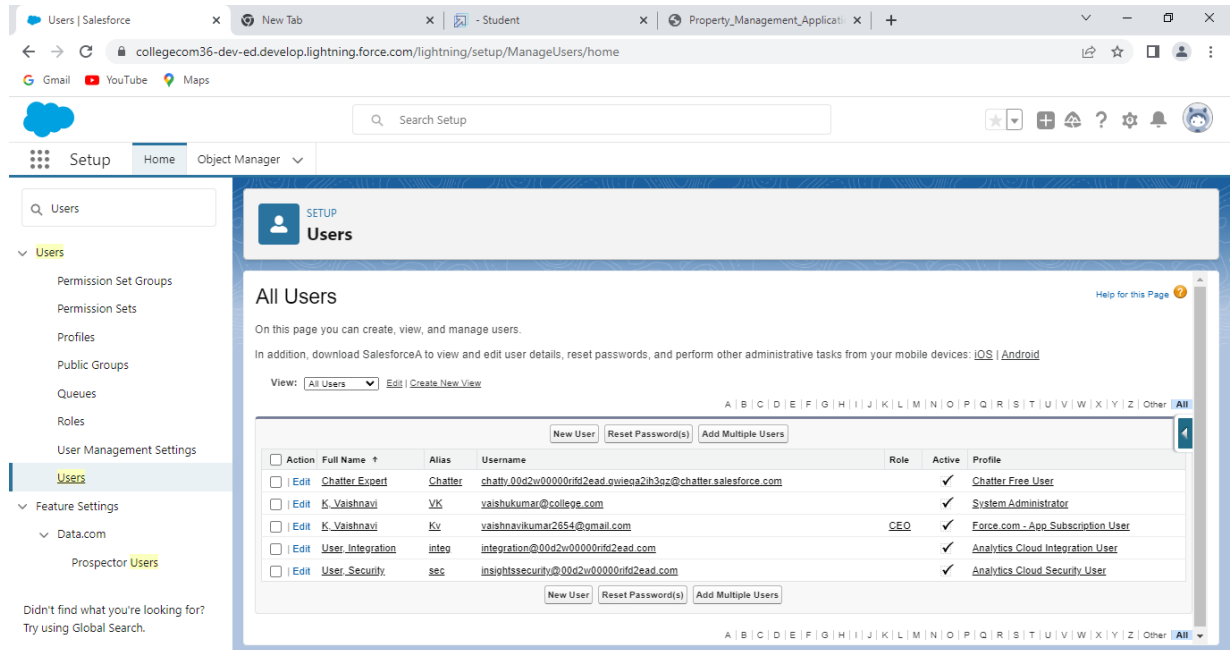
The screenshot shows the Salesforce Setup interface for the 'Sales Manager' profile. The left sidebar contains a search bar with 'profiles' and a list of navigation items: Users, Profiles, and a search result for 'profiles'. The main content area is titled 'Profiles' and includes a 'Profile' section for 'Sales Manager'. Below this, there is a 'Profile Detail' table and a 'Page Layouts' table.

Profile Detail	
Name	Sales Manager
User License	Analytics Cloud Integration User
Description	
Created By	Vaishnavi K. 14/04/2023, 4:52 pm
Modified By	Vaishnavi K. 14/04/2023, 5:00 pm

Page Layouts	
Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Object Milestone	Object Milestone Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Maps	Maps Default

Creation Of Profiles

Milestone 7:

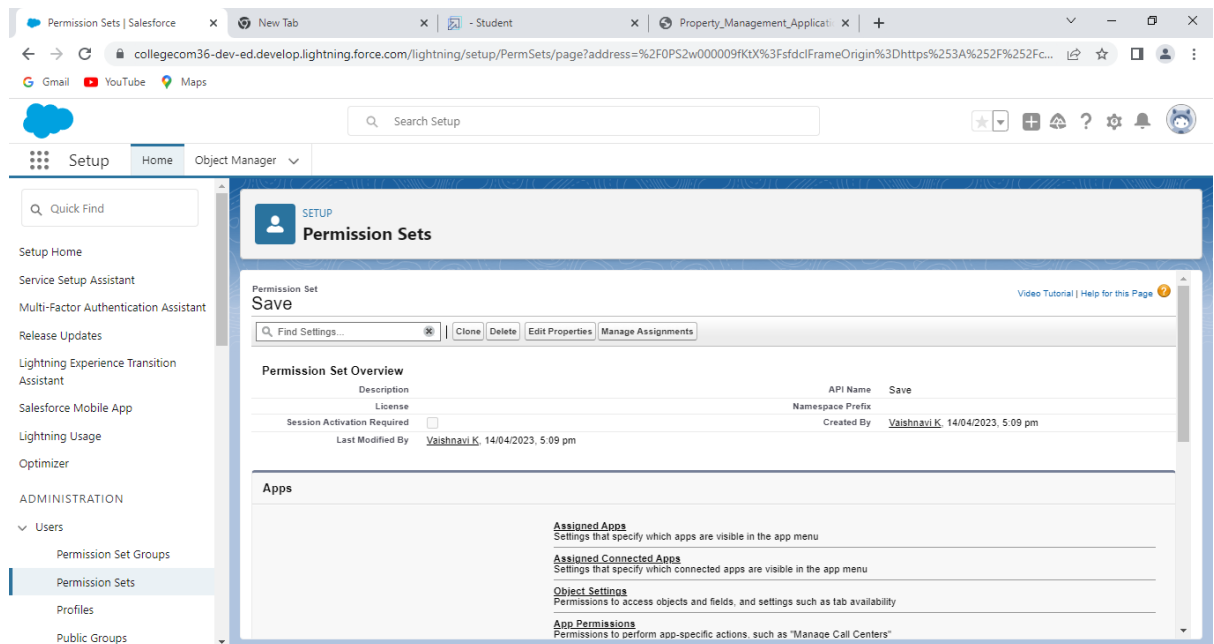


The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with 'Users' selected. The main content area is titled 'All Users' and includes a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The following table represents the data shown in the screenshot:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w0000rfd2ead.0wieno2h3oz@chatter.salesforce.com		✓	Chatter Free User
Edit	K. Vaishnavi	VK	vaishnavikumar@college.com		✓	System Administrator
Edit	K. Vaishnavi	Kv	vaishnavikumar2654@gmail.com	CEO	✓	Force.com - App Subscription User
Edit	User Integration	integ	integration@00d2w0000rfd2ead.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w0000rfd2ead.com		✓	Analytics Cloud Security User

Creation Of Users

Milestone 8:



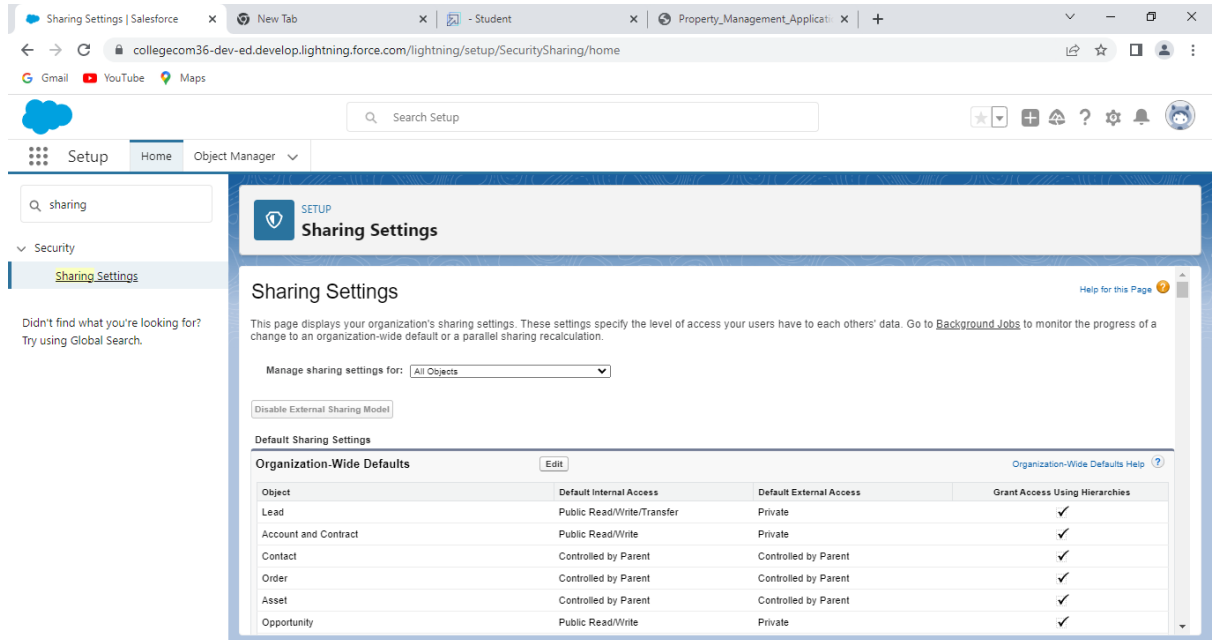
The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a navigation menu with 'Permission Sets' selected. The main content area is titled 'Permission Set Overview' and includes a table of existing permission sets. The following table represents the data shown in the screenshot:

Permission Set	Description	API Name	Save
Save			

The 'Apps' section is also visible, showing a list of apps and their settings.

Creation Of Permission sets

Milestone 9:

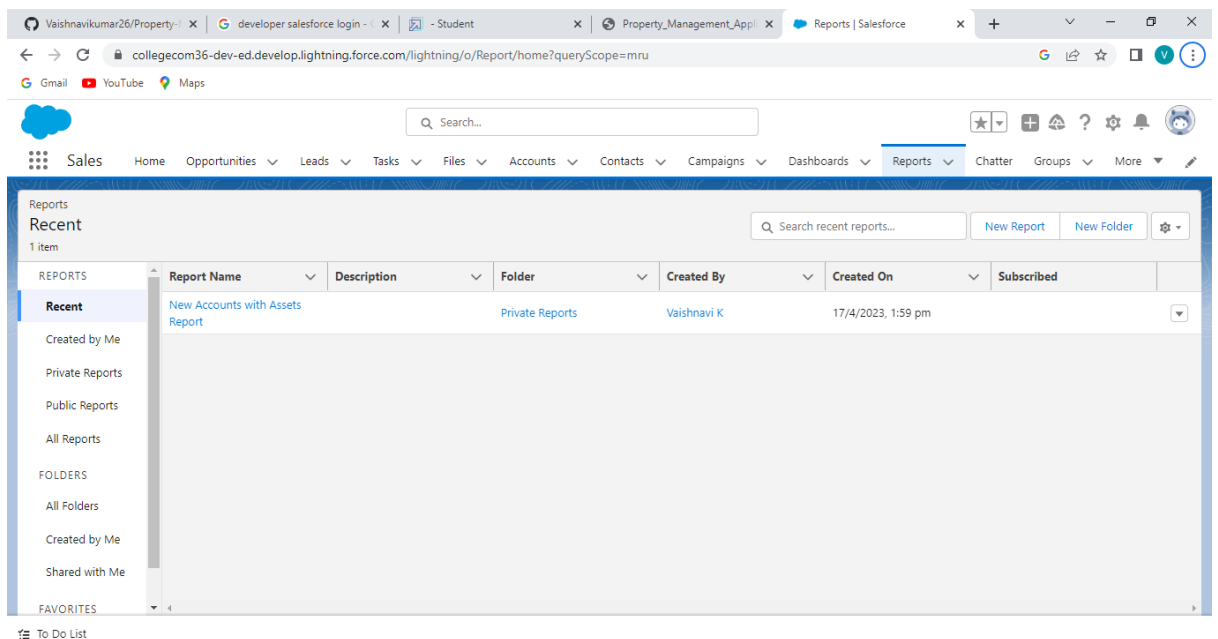


The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar has a search bar with 'sharing' and a 'Security' section with 'Sharing Settings' highlighted. The main content area is titled 'Sharing Settings' and includes a 'Manage sharing settings for:' dropdown set to 'All Objects'. Below this is a 'Default Sharing Settings' section with a table of 'Organization-Wide Defaults'.

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	✓

Creation of sharing settings

Milestone 10:

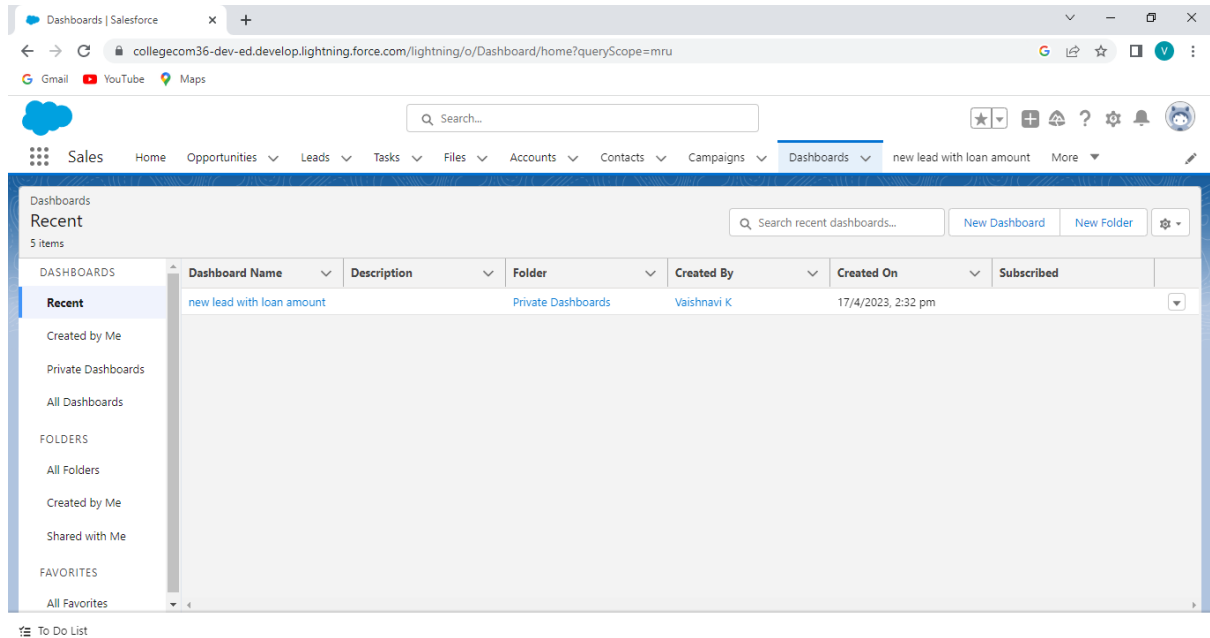


The screenshot shows the Salesforce Reports page. The left sidebar has a search bar and a 'Reports' section with 'Recent' highlighted. The main content area is titled 'Recent' and shows a table of recent reports.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Accounts with Assets Report		Private Reports	Vaishnavi K	17/4/2023, 1:59 pm	

Creation of Reports

Milestone 11:



Creation of Dashboards

4 TRAILHEAD PROFILE PUBLIC URL

Team Lead <https://trailblazer.me/id/vaisk27>

Team Member 1 <https://trailblazer.me/id/vaisk27>

Team Member 2 <https://trailblazer.me/id/abara311>

Team Member 3 <https://trailblazer.me/id/abitk1>

5. ADVANTAGES & DISADVANTAGES

Advantages

Leverage real-time reports and dashboards.

Streamline lead, opportunity and contact management.

Disadvantages

Higher price if you look not only for technical skills but for industry expertise, especially in specific niches like property management.

6. APPLICATIONS

A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential

rental properties. PMS is also used in manufacturing industries local government and manufacturing.

7. CONCLUSION

Property management systems (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.

8. FUTURE SCOPE

The property management industry operates in an aggressive and continuously changing environment. For property management businesses to thrive, property managers need to stay updated with the upcoming industry trends.