

Project Report Template

PROPERTY MANAGEMENT SYSTEM

1. Introduction :

1.1. Overview

Property management CRM is specially designed software that helps property owners and managers cultivate successful relationships with current and prospective residents. CRMs do this by providing you with a database that stores both current and prospective resident information.

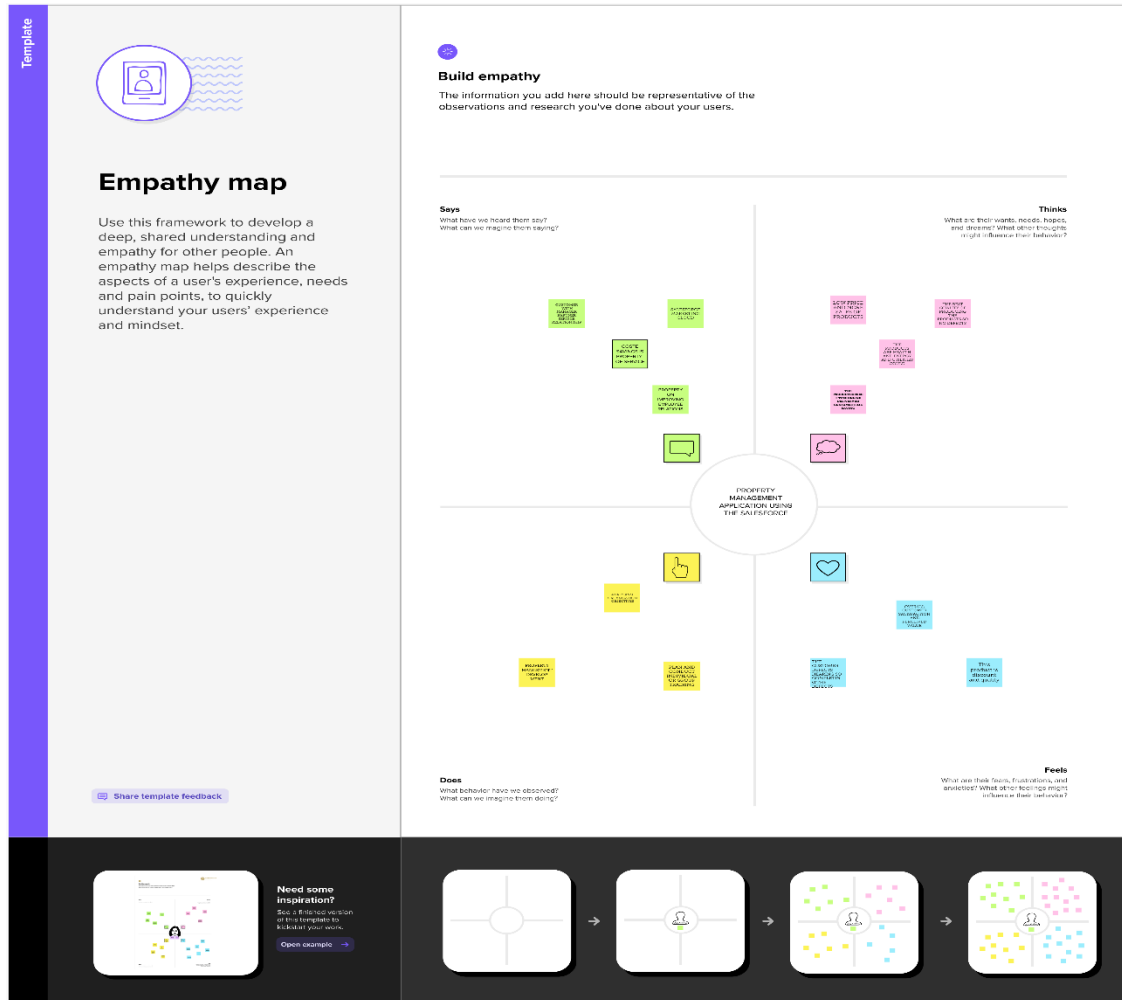
1.2. Purpose

The key features of a good PMS should include:

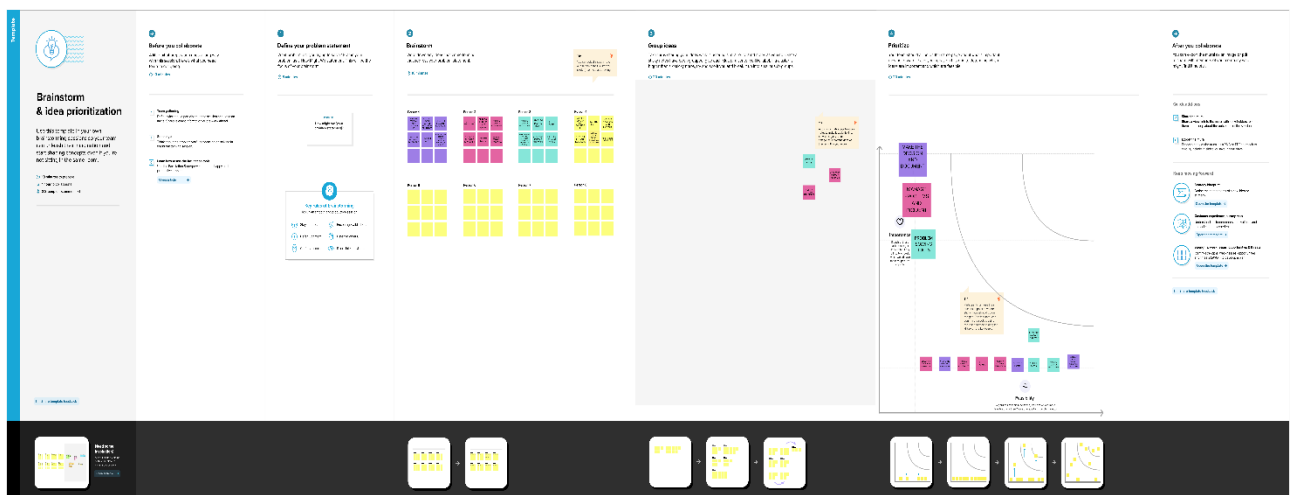
- ❖ *Reservation management.*
- ❖ *Front desk operations management.*
- ❖ *Channel management integration.*
- ❖ *Mobile apps.*
- ❖ *Marketing support.*
- ❖ *CRM & guest communication.*
- ❖ *Housekeeping management.*
- ❖ *Maintenance management.*

2. Problem Definition & Design Thinking :

2.1. Empathy Map For Build an Event Management Using Salesforce



2.2. Ideation & Brainstorming Map



3. RESULT :

3.1. Data Model :

Objects	Fields in the Object	
Buy	Field Label	Data Type
	Create Property Type	Picklist
	Discount	Percentage
	State	Picklist
	City	Text
	Annual Amount to be Paid	Text
Rent	Field Label	Data Type
	Rent	Auto Number
	Rental City	Text
	BHK Type	Picklist
Loan	Field Label	Data Type
	Loan Id	Auto Number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total Loan Instalments	Number
	Loan Repayment	Number
	Loan Amount	Formula

3.2. Activity & Screenshot

3.2.1. Objects :

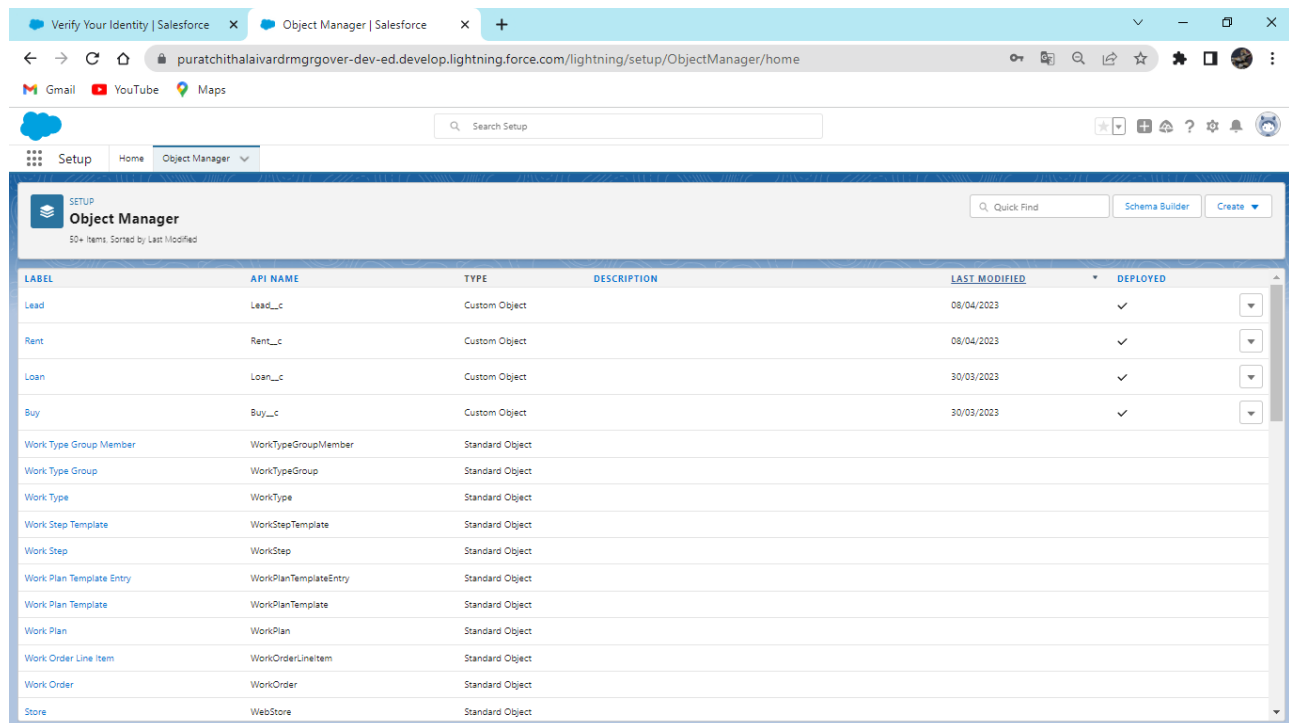
Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types :

- **Standard Objects :** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects :** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Creation of Custom Objects :

- **Buy**
- **Rent**
- **Loan**
- **Lead**



The screenshot shows the Salesforce Object Manager interface. The browser address bar indicates the URL: `puratchithalaivardmrgover-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is "Object Manager" with a sub-header "50+ Items, Sorted by Last Modified". The table lists various objects, including custom objects (Lead, Rent, Loan, Buy) and standard objects (Work Type Group Member, Work Type Group, Work Type, Work Step Template, Work Step, Work Plan Template Entry, Work Plan Template, Work Plan, Work Order Line Item, Work Order, Store). The columns are: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lead	Lead__c	Custom Object		08/04/2023	✓
Rent	Rent__c	Custom Object		08/04/2023	✓
Loan	Loan__c	Custom Object		30/03/2023	✓
Buy	Buy__c	Custom Object		30/03/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			
Work Plan	WorkPlan	Standard Object			
Work Order Line Item	WorkOrderLineItem	Standard Object			
Work Order	WorkOrder	Standard Object			
Store	WebStore	Standard Object			

3.2.2. Tab :

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

- **Standard Object Tabs:** Standard object tabs display data related to standard objects.
 - **Custom Object Tabs:** Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.
 - **Web Tabs:** Web Tabs display any external Web-based application or Web page in a Salesforce tab.
 - **Visualforce Tabs:** Visualforce Tabs display data from a Visualforce Page.
- NOTE: we won't be dealing with web tabs and visualforce tabs later.

Creation of Tabs :

- **Buy Tab**
- **Rent Tab**
- **Loan Tab**
- **Lead Tab**

The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser address bar indicates the URL: `puratchithalaivardmrgover-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home`. The page title is "Custom Tabs". Below the title, there is a brief explanation: "You can create new custom tabs to extend Salesforce functionality or to build new application functionality." and "Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app." The page is divided into two main sections: "Custom Object Tabs" and "Web Tabs". The "Custom Object Tabs" section contains a table with the following data:

Action	Label	Tab Style	Description
Edit Del	Buyers	Whistle	
Edit Del	Leads	Cell phone	
Edit Del	Loans	Hands	
Edit Del	Rents	Real Estate Sign	

The "Web Tabs" section shows a message: "No Web Tabs have been defined".

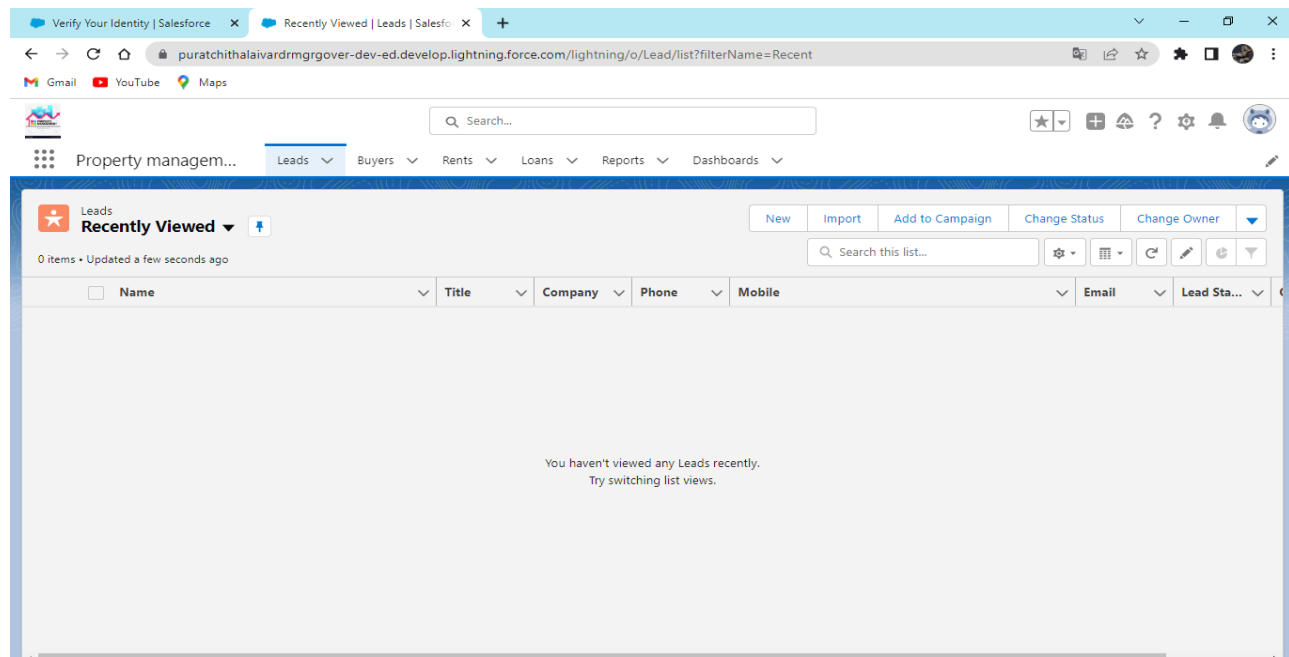
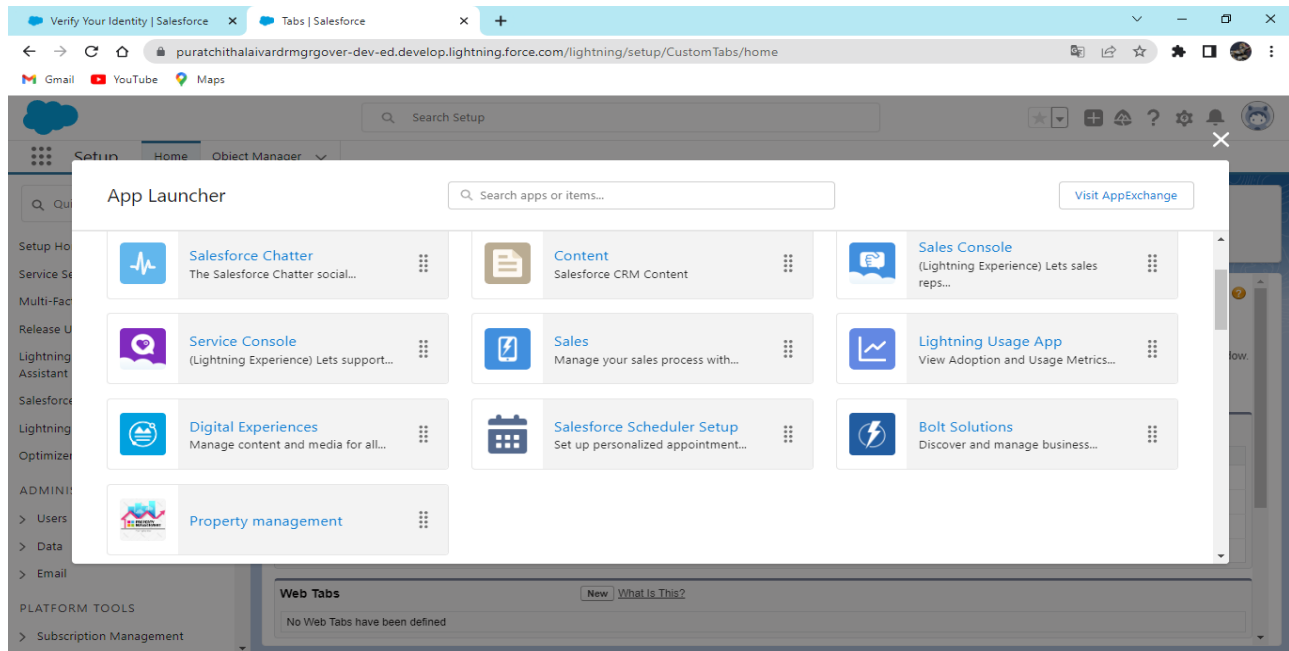
3.2.3. The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Creation of the Lightning App :

➤ **Property Management**



3.2.4. Fields

Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

- *Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.*
- *Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.*

Creation of Fields

- **Lead objects**
- **Buy objects**
- **Rent objects**
- **Loan objects**

Creation of fields for the Lead objects

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays the 'Fields & Relationships' section for the 'Lead' object, showing a table of 5 items sorted by Indexed. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The rows listed are Owner, Lead Name, Last Modified By, Created By, and Lead.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Owner	OwnerId	Lookup(User,Group)		✓
Lead Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Created By	CreatedById	Lookup(User)		
Lead	Lead__c	Auto Number		

Creation of fields for the Buy objects

Verify Your Identity | Salesforce | Recently Viewed | Leads | Salesforce | Buy | Salesforce

puratchithalaivardmrgover-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003Rn1H/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Buy

Details

Fields & Relationships
9 Items, Sorted by Indexed

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy	Buy__c	Picklist		
Discount	Discount__c	Percent(18, 0)		
State	State__c	Picklist		
City	City__c	Text(18)		
Annual Amount To Be Paid	Annual_Amount_To_Be_Paid__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		

Creation of fields for the Rent objects

Verify Your Identity | Salesforce | Recently Viewed | Leads | Salesforce | Rent | Salesforce

puratchithalaivardmrgover-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003Rn1W/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Rent

Details

Fields & Relationships
7 Items, Sorted by Indexed

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Rent	Rent__c	Auto Number		
Rental city	Rental_city__c	Text(18)		
BHK type	BHK_type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Rent Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

Creation of fields for the Loan objects

Verify Your Identity | Salesforce | Loan | Salesforce

puratchithalaivardmrgover-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003Rn2e/FieldsAndRelationships...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Loan

Details

Fields & Relationships
11 Items, Sorted by Indexed

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Term	Term__c	Number(18, 0)		
Total Loan Instalments	Total_Loan_Instalments__c	Number(18, 0)		
Annual loan	Annual_loan__c	Number(18, 0)		
Loan Id	Loan__c	Auto Number		
Loan Repayment	Loan_Repayment__c	Number(18, 0)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		

3.2.5. Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

A profile can be assigned to many users, but user can be assigned single profile at a time.

Creation of Profile

- Sales Manager
- Marketing Executives
- Marketing Manager
- Sales Rep 1
- Sales Rep 2
- Sales Rep 3

Creation on Sales Manager Profile

The screenshot shows the Salesforce Setup page for the 'Sales Manager' profile. The left sidebar contains 'Users' and 'Profiles' tabs. The main content area is titled 'Profiles' and shows the 'Sales Manager' profile details. The profile is created by 'Vasanthi Sela' on 05/04/2023 at 11:34 am. The 'Page Layouts' section shows various layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, and Asset Action. The 'Page Layouts' table lists the following layouts:

Layout	Layout Name
Global	Global Layout
Email Application	Not Assigned
Home Page Layout	DE Default
Account	Account Layout
Alternative Payment Method	Alternative Payment Method Layout
Appointment Invitation	Appointment Invitation Layout
Asset	Asset Layout
Asset Action	Asset Action Layout
Object Milestone	Object Milestone Layout
Operating Hours	Operating Hours Layout
Opportunity	Opportunity Layout
Opportunity Product	Opportunity Product Layout
Order	Order Layout
Order Product	Order Product Layout
Payment	Payment Layout
Payment Authorization	Payment Authorization Layout

Creation on Marketing Executives Profile

The screenshot shows the Salesforce Setup page for the 'Marketing Executive' profile. The left sidebar contains 'Users' and 'Profiles' tabs. The main content area is titled 'Profiles' and shows the 'Marketing Executive' profile details. The profile is created by 'Vasanthi Sela' on 07/04/2023 at 4:10 pm. The 'Page Layouts' section shows various layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, and Asset Action. The 'Page Layouts' table lists the following layouts:

Layout	Layout Name
Global	Global Layout
Email Application	Not Assigned
Home Page Layout	DE Default
Account	Account Layout
Alternative Payment Method	Alternative Payment Method Layout
Appointment Invitation	Appointment Invitation Layout
Asset	Asset Layout
Asset Action	Asset Action Layout
Object Milestone	Object Milestone Layout
Operating Hours	Operating Hours Layout
Opportunity	Opportunity Layout
Opportunity Product	Opportunity Product Layout
Order	Order Layout
Order Product	Order Product Layout
Payment	Payment Layout
Payment Authorization	Payment Authorization Layout

Creation on Marketing Manager Profile

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Marketing Manager' profile is selected. The 'Profile Detail' section shows the name 'Marketing Manager', user license 'Salesforce', and description 'Marketing Manager'. The 'Page Layouts' section shows the 'Global' layout assigned to the profile. The 'Standard Object Layouts' section shows the 'Global' layout assigned to the profile. The 'Object Milestone' section shows the 'Global' layout assigned to the profile.

Creation on Sales Rep 1 Profile

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Sales Rep 1' profile is selected. The 'Profile Detail' section shows the name 'Sales Rep 1', user license 'Salesforce', and description 'Sales Rep 1'. The 'Page Layouts' section shows the 'Global' layout assigned to the profile. The 'Standard Object Layouts' section shows the 'Global' layout assigned to the profile. The 'Object Milestone' section shows the 'Global' layout assigned to the profile.

Creation on Sales Rep 2 Profile

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Sales Rep 2' profile is selected. The 'Profile Detail' section shows the name 'Sales Rep 2', user license 'Salesforce', and description 'Sales Rep 2'. The 'Page Layouts' section shows the 'Global' layout assigned to the profile. The 'Standard Object Layouts' section shows the 'Global' layout assigned to the profile. The 'Object Milestone' section shows the 'Global' layout assigned to the profile.

Creation on Sales Rep 3 Profile

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Sales Rep 3' profile is selected. The 'Profile Detail' section shows the name 'Sales Rep 3', user license 'Salesforce', and description 'Sales Rep 3'. The 'Page Layouts' section shows the 'Global' layout assigned to the profile. The 'Standard Object Layouts' section shows the 'Global' layout assigned to the profile. The 'Object Milestone' section shows the 'Global' layout assigned to the profile.

3.2.6. User

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Creation of User

The screenshot shows the Salesforce Setup page for the 'Users' section. The left sidebar contains a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospector Users. The main content area displays the user profile for 'S Vasanthi'. The profile includes a 'User Detail' section with fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, App Registration: Salesforce Authenticator, and Security Key (U2F or WebAuthn). The 'Role' section shows the user's role as 'Salesforce' and 'Marketing Executive'. The 'User License' section shows the user's license as 'Marketing Executive'. The 'Profile' section shows the user's profile as 'Active'. The 'Marketing User' section shows the user's marketing user status as 'Marketing User'. The 'Offline User' section shows the user's offline user status as 'Offline User'. The 'Knowledge User' section shows the user's knowledge user status as 'Knowledge User'. The 'Flow User' section shows the user's flow user status as 'Flow User'. The 'Service Cloud User' section shows the user's service cloud user status as 'Service Cloud User'. The 'Site.com Contributor User' section shows the user's site.com contributor user status as 'Site.com Contributor User'. The 'Site.com Publisher User' section shows the user's site.com publisher user status as 'Site.com Publisher User'. The 'WDC User' section shows the user's WDC user status as 'WDC User'. The 'Mobile Push Registrations' section shows the user's mobile push registrations status as 'View'. The 'Data.com User Type' section shows the user's data.com user type status as 'View'. The 'Accessibility Mode (Classic Only)' section shows the user's accessibility mode status as 'View'. The 'Debug Mode' section shows the user's debug mode status as 'View'. The 'High-Contrast Palette on Charts' section shows the user's high-contrast palette status as 'View'. The 'Load Lightning Pages While Scrolling' section shows the user's load lightning pages status as 'View'. The 'Salesforce CRM Content User' section shows the user's salesforce CRM content user status as 'View'. The 'Receive Salesforce CRM Content Email Alerts' section shows the user's receive Salesforce CRM content email alerts status as 'View'.

The screenshot shows the Salesforce Setup page for the 'Users' section. The left sidebar contains a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospector Users. The main content area displays the user profile for 'S Vasanthi'. The profile includes a 'User Detail' section with fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, App Registration: Salesforce Authenticator, and Security Key (U2F or WebAuthn). The 'Role' section shows the user's role as 'Salesforce' and 'Marketing Executive'. The 'User License' section shows the user's license as 'Marketing Executive'. The 'Profile' section shows the user's profile as 'Active'. The 'Marketing User' section shows the user's marketing user status as 'Marketing User'. The 'Offline User' section shows the user's offline user status as 'Offline User'. The 'Knowledge User' section shows the user's knowledge user status as 'Knowledge User'. The 'Flow User' section shows the user's flow user status as 'Flow User'. The 'Service Cloud User' section shows the user's service cloud user status as 'Service Cloud User'. The 'Site.com Contributor User' section shows the user's site.com contributor user status as 'Site.com Contributor User'. The 'Site.com Publisher User' section shows the user's site.com publisher user status as 'Site.com Publisher User'. The 'WDC User' section shows the user's WDC user status as 'WDC User'. The 'Mobile Push Registrations' section shows the user's mobile push registrations status as 'View'. The 'Data.com User Type' section shows the user's data.com user type status as 'View'. The 'Accessibility Mode (Classic Only)' section shows the user's accessibility mode status as 'View'. The 'Debug Mode' section shows the user's debug mode status as 'View'. The 'High-Contrast Palette on Charts' section shows the user's high-contrast palette status as 'View'. The 'Load Lightning Pages While Scrolling' section shows the user's load lightning pages status as 'View'. The 'Salesforce CRM Content User' section shows the user's salesforce CRM content user status as 'View'. The 'Receive Salesforce CRM Content Email Alerts' section shows the user's receive Salesforce CRM content email alerts status as 'View'.

3.2.7. Permission Sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users, regardless of their primary job function. For example, let's say you have several users who must delete and transfer leads. You can create a permission set based on the tasks that these users must perform and include the permission set within permission set groups based on job functions.

Creating a Permission Set

The screenshot shows the Salesforce Setup interface for a Permission Set named 'Experience Profile Manager'. The left sidebar contains a search bar with 'permission' and a list of navigation items: Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled 'Permission Set Experience Profile Manager' and includes a search bar, 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. Below this is a 'Permission Set Overview' section with a table showing details: Description (Experience Profile Manager), License (Salesforce), API Name (Experience_Profile_Manager), Namespace Prefix, Session Activation Required (unchecked), Last Modified By (Vasanthi Setai), and Created By (Vasanthi Setai). The 'Apps' section lists various permission categories: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, and Flow Access, each with a brief description of what they control.

The screenshot shows the Salesforce Setup interface for a Permission Set named 'Salesrep'. The left sidebar is identical to the previous screenshot, with 'Permission Sets' selected. The main content area is titled 'Permission Set Salesrep' and includes a search bar, 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments' buttons. The 'Permission Set Overview' section shows details: Description (Salesrep), License (Salesforce), API Name (Salesrep), Namespace Prefix, Session Activation Required (unchecked), Last Modified By (Vasanthi Setai), and Created By (Vasanthi Setai). The 'Apps' section lists the same permission categories as the previous screenshot: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, and Flow Access, each with a brief description.

3.2.8. Set Up for OWD

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth). Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

- **Public Read/Write/Transfer (only available of Leads and Cases)**
- **Public Read/Write**
- **Public Read/Only**
- **Private**

Creating a Set up for OWD

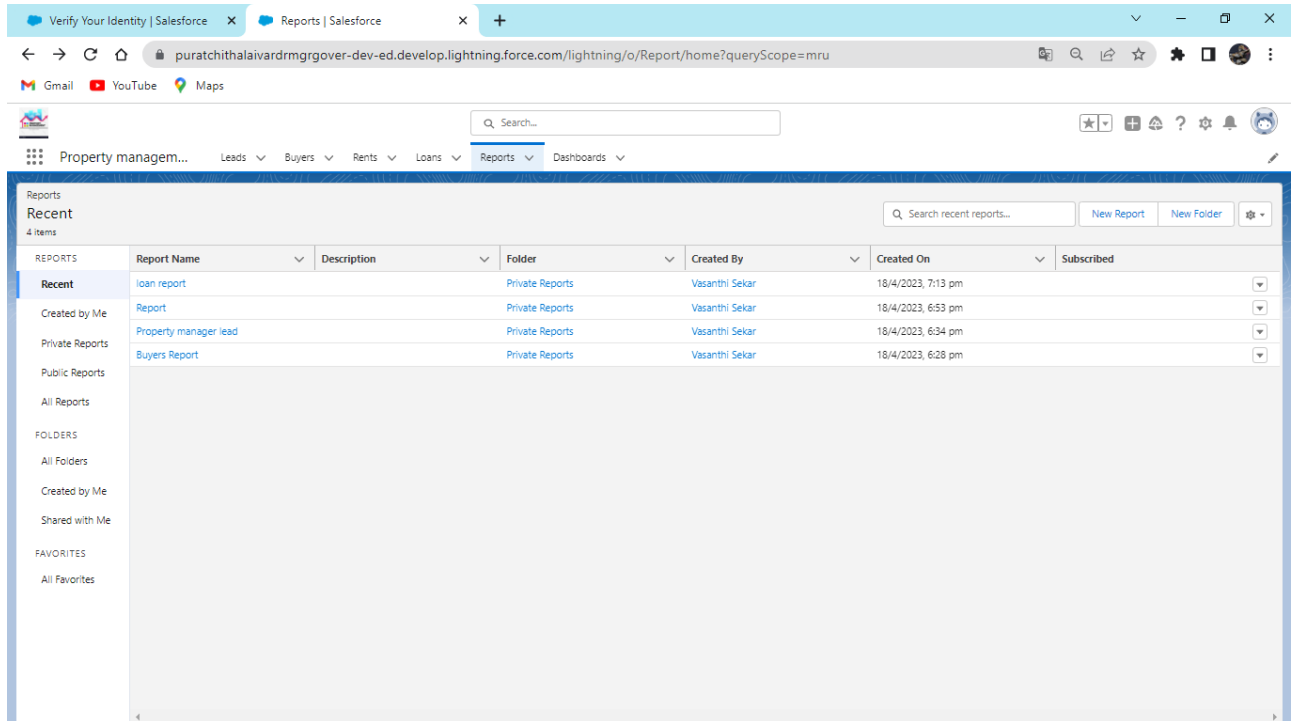
The screenshot displays the Salesforce Sharing Settings page. The left sidebar shows the navigation menu with 'Setup' and 'Home' options. The main content area is titled 'Sharing Settings' and contains a table of objects and their sharing settings. The 'Buy' object is selected, showing 'Public Read/Write' for the 'Buy' role and 'Private' for the 'Buyer' role. The 'Lead' object is also selected, showing 'Public Read/Write' for the 'Lead' role and 'Private' for the 'Lead' role. The 'Loan' object is selected, showing 'Public Read/Write' for the 'Loan' role and 'Private' for the 'Loan' role. The 'Rent' object is selected, showing 'Private' for the 'Rent' role and 'Private' for the 'Rent' role.

Object	Role	Sharing Setting	Checkmark
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 Card Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Buy	Public Read/Write	Private	✓
Lead	Private	Private	✓
Loan	Public Read/Write	Private	✓
Rent	Private	Private	✓

3.2.9. Reports

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

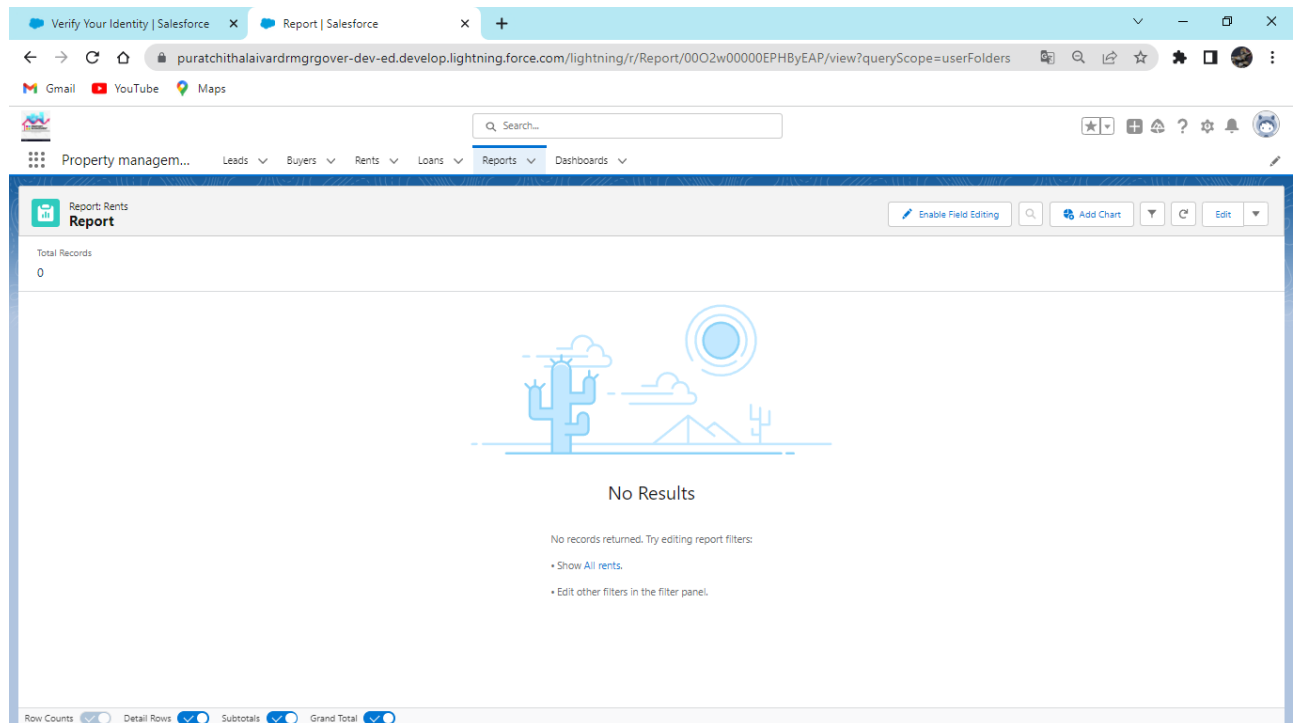
Creating a Report



The screenshot shows the Salesforce Reports home page. The browser address bar displays the URL: `puratchithalaivardmrgover-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru`. The page features a sidebar with navigation options: Property management..., Leads, Buyers, Rents, Loans, Reports (selected), and Dashboards. The main content area is titled "Reports" and "Recent" (4 items). It includes a search bar for "Search recent reports..." and buttons for "New Report" and "New Folder". A table lists recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	loan report		Private Reports	Vasanthi Sekar	18/4/2023, 7:13 pm	
Created by Me	Report		Private Reports	Vasanthi Sekar	18/4/2023, 6:53 pm	
Private Reports	Property manager lead		Private Reports	Vasanthi Sekar	18/4/2023, 6:34 pm	
Public Reports	Buyers Report		Private Reports	Vasanthi Sekar	18/4/2023, 6:28 pm	

Below the table, there are sections for "FOLDERS" (All Folders, Created by Me, Shared with Me) and "FAVORITES" (All Favorites).



The screenshot shows the Salesforce Report view for "Rents". The browser address bar displays the URL: `puratchithalaivardmrgover-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000EPHByEAP/view?queryScope=userFolders`. The page features a sidebar with navigation options: Property management..., Leads, Buyers, Rents, Loans, Reports (selected), and Dashboards. The main content area is titled "Report: Rents" and "Report". It includes a search bar for "Search..." and buttons for "Enable Field Editing", "Add Chart", and "Edit". The report shows "Total Records: 0". A large illustration of a cactus and a sun is displayed, followed by the text "No Results". Below this, a message states: "No records returned. Try editing report filters:".

- Show All rents.
- Edit other filters in the filter panel.

At the bottom, there are toggle switches for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total".

3.2.10. Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Creating a Dashboards

This screenshot shows the 'Recent' list of dashboards in Salesforce. The interface includes a search bar, 'New Dashboard' and 'New Folder' buttons, and a table of recent items. The table has columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The 'Recent' section lists four items, all named 'Property Management Dashboard' and created by 'Vasanthi Sekar' on 18/4/2023. The left sidebar shows navigation options like 'Property management...', 'Leads', 'Buyers', 'Rents', 'Loans', 'Reports', and 'Dashboards'.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Property Management Dashboard		Private Dashboards	Vasanthi Sekar	18/4/2023, 7:22 pm	
Created by Me	Property Management Dashboard		Private Dashboards	Vasanthi Sekar	18/4/2023, 7:20 pm	
Private Dashboards	Property Management Dashboard		Private Dashboards	Vasanthi Sekar	18/4/2023, 7:17 pm	
All Dashboards	Property Management Dashboard		Private Dashboards	Vasanthi Sekar	18/4/2023, 7:16 pm	

This screenshot shows the 'Property Management Dashboard' in Salesforce. The dashboard header includes a 'Refresh' button, 'Edit' link, and 'Subscribe' button. The main content area displays two 'loan report' visualizations, both of which show a message: 'We can't draw this chart because there is no data.' Below each visualization is a 'View Report (loan report)' link. The left sidebar shows navigation options like 'Property management...', 'Leads', 'Buyers', 'Rents', 'Loans', 'Reports', and 'Dashboards'.

4. Trailhead Profile Public URL :

Team Lead - <https://trailblazer.me/id/vannapan>
Team Member 1 - <https://trailblazer.me/id/vasnathi1401>
Team Member 2 - <https://trailblazer.me/id/abitha020103>
Team Member 3 - <https://trailblazer.me/id/sneha1136>

5. ADVANTAGES & DISADVANTAGES :

ADVANTAGES:

- ❖ Salesforce allows you to unify email, social, phone, and chat support and helps manage every channel from one view.
- ❖ Customize Data: Salesforce allows you to handle and customize different types of data.
- ❖ It helps you track real-time analytics and enhance the customer experience.

DISADVANTAGES:

- ❖ Expensive.
- ❖ You have to pay for add-ons to get the most out of the software.
- ❖ Configuration and setup is complex and time-consuming.
- ❖ Cluttered interface makes navigation and simple tasks unnecessarily complex.
- ❖ The learning curve never seems to end.
- ❖ Customer support has a poor reputation.

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 :

- ❖ The key features of a good PMS should include:
- ❖ Reservation management.
- ❖ Front desk operations management.
- ❖ Channel management integration.
- ❖ Mobile apps.
- ❖ Marketing support.
- ❖ CRM & guest communication.
- ❖ Housekeeping management.
- ❖ Maintenance management.

8. FUTURE SCOPE :

- ❖ Account Executive Jobs.
- ❖ Inside Sales Representative Jobs.
- ❖ Director Of Sales Jobs.
- ❖ Business Development Manager Jobs.
- ❖ Customer Success Manager Jobs.
- ❖ Enterprise Account Executive Jobs.
- ❖ Senior Account Executive Jobs .

