

# **Project Report Template**

## **INTRODUCTION:**

### **1.1 Overview**

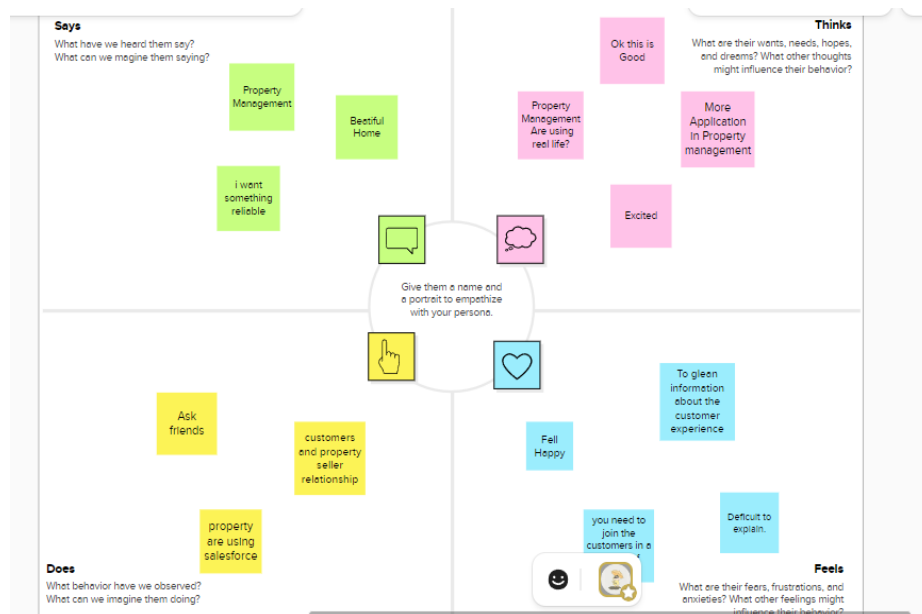
**We Will Take a look at the Property Management Application which we will build in this course. We will learn about the custom object which we will create for our Property Management application. We will also learn about integrating authorize. Net payment gateway system with Salesforce in order to process the payments made by our renter.**

### **1.2 Purpose**

**The relationship between the owner of a rental property and the person or agency they have chosen to manager that property is essential to the success of the investment for both parties. Property managers assist owners in creating budgets, advertise rental properties, qualify tenants, and collect rent. They also comply with the local landlord and real estate board laws and maintain the property.**

## 2.Problem Definition and Design Thinking:

### 2.1. Empathy Map



### 2.2 Ideation and Brainstorming map Screenshot:

Untitled mural

**Brainstorm & idea prioritization**

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

10 minutes to prepare  
1 hour to collaborate  
2-8 people recommended

**Before you collaborate**

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

10 minutes

**Team gathering**  
Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

**Set the goal**  
Think about the problem you'll be focusing on solving in the brainstorming session.

**Learn how to use the facilitation tools**  
Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#)

**Define your problem statement**

What are the issues customer expect in property management? How do you solve customer problem?

5 minutes

32%

2

## Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

**TIP**  
You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

**Person 1**

organize all your properties as one center for better management

manage your properties from remote location

Several types of property owners can benefit from the services that property managers offer

Listen carefully to what the customer has to say

**Person 2**

faster response time

Effective lead management

property management is the design of real estate by a third party

Easy maintenance & monitoring to customer

**Person 3**

More Freedom for Customer

landlords and developers involve trusty operators

More time Taking for customer

No stress give for Customer

**Person 4**

Collecting rent for fixed rate and time

repair and maintenance service

Accounting Service

Inspections of property to help customer

**Person 5**

Property sale and purchase held to customer

Accounts and finance

Marketing Properties to customer

Arranging for necessary repairs to property

**Person 6**

**Person 7**

**Person 8**

1

## Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

20 minutes

**Create a quality website:**  
A quality website creates a wonderful first impression for people.

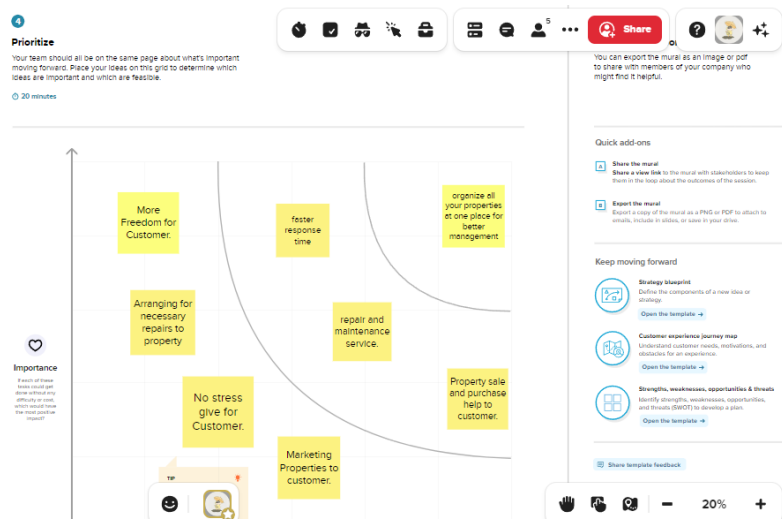
**Create a content marketing plan:**  
Having a content marketing plan is the way to go if you want to get the best results out of your content.

**Social media:**  
Having a good social media marketing plan is cost-effective and can generate impressive results for getting new clients.

**Property Management ads:**  
Use popular platforms like Facebook, Instagram etc as places for your Property Management ads to build better relationship with your customers.

**Increase of property capacity:**  
In the event that the client wishes to increase the capacity of the properties to be registered in the system he may access a higher rate plan that will allow it to manage a higher number of properties at any time.

**TIP**  
Add customer tags to sticky notes to make easier to find similar segments and categorize important ideas as keywords within your mural.



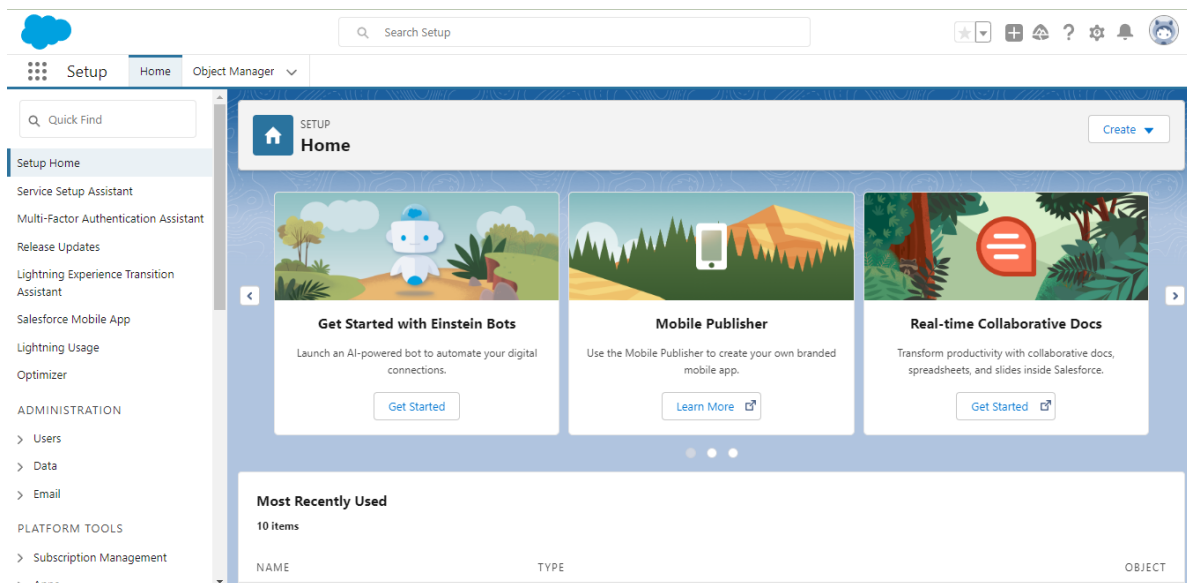
## 3.RESULT:

### 3.1 Data Model:

Object name	Fields in the Object
Object-1	Field Label: Buy
Object-2	Field Label: Loan
Object-3	Field Label: Rent

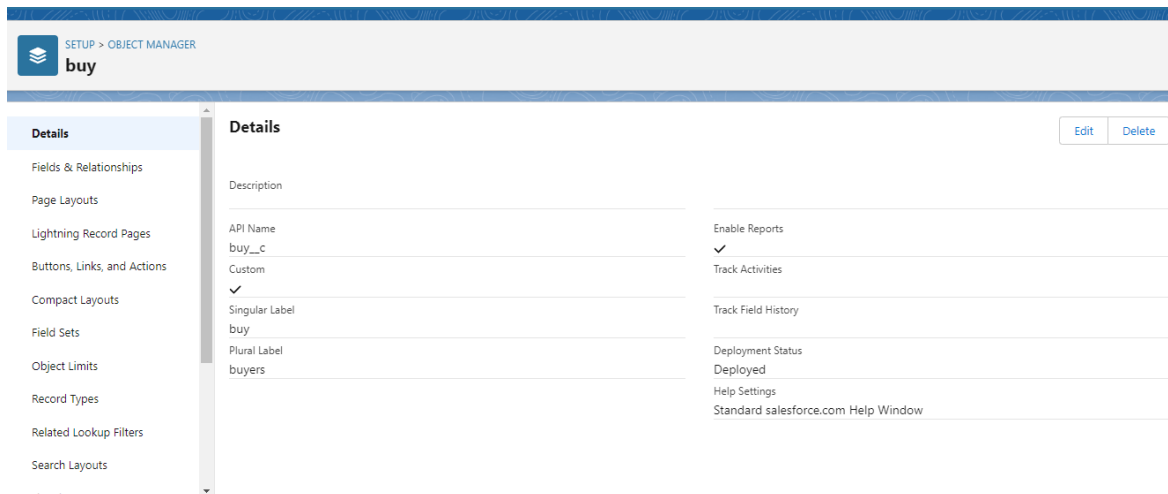
### 3.2 Activity and Screenshot:

Create salesforce Org-creating Developer Account



## Object:

## Creation of Buy object



# Creation of Loan Object

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

EditDelete

# Creation of Rent Object

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

Details

Description

API Name

Rent\_\_c

Custom

✓

Singular Label

Rent

Plural Label

Rents

Enable Reports

✓

Track Activities

Track Field History

Deployment Status


Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

## Create A Tab

 **SETUP**  
**Tab**s





### Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

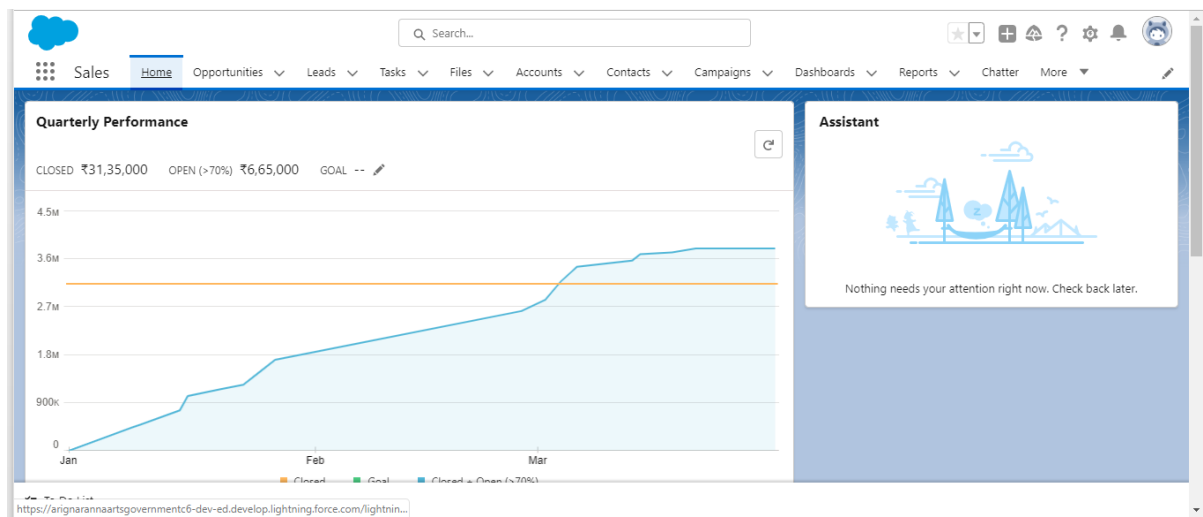
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to 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.

Custom Object Tabs

[New](#) [What Is This?](#)

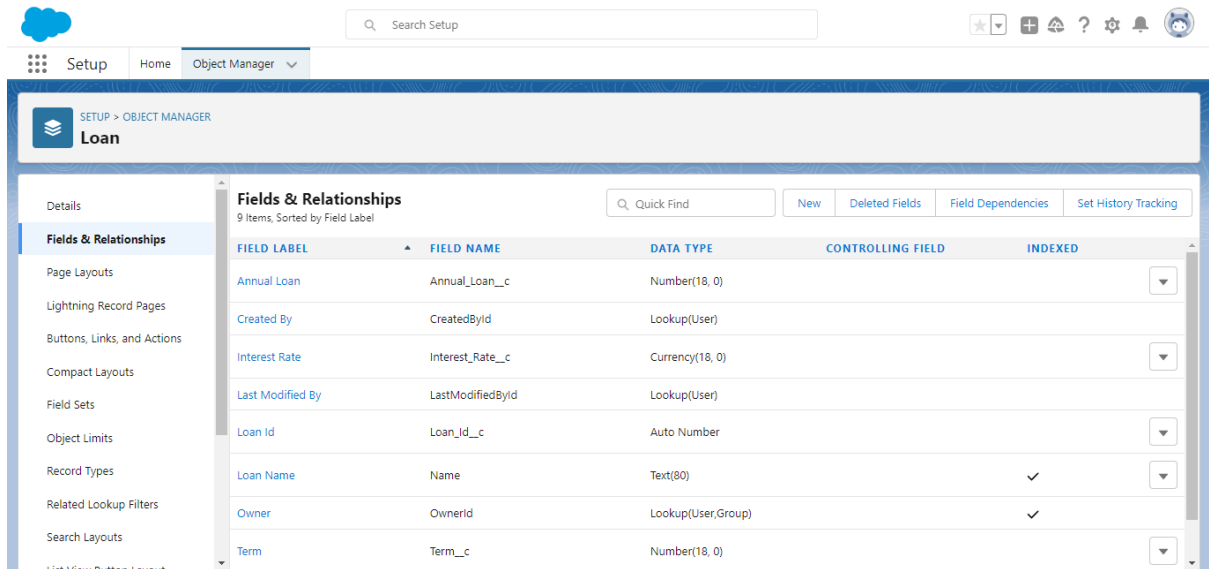
Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Apples</a>	 Apple	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Bouys</a>	 Car	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Lood</a>	 Bank	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Rents</a>	 Building Block	

## Lighting App



## Field and Relationship

### Creation Field for The Loan Objects

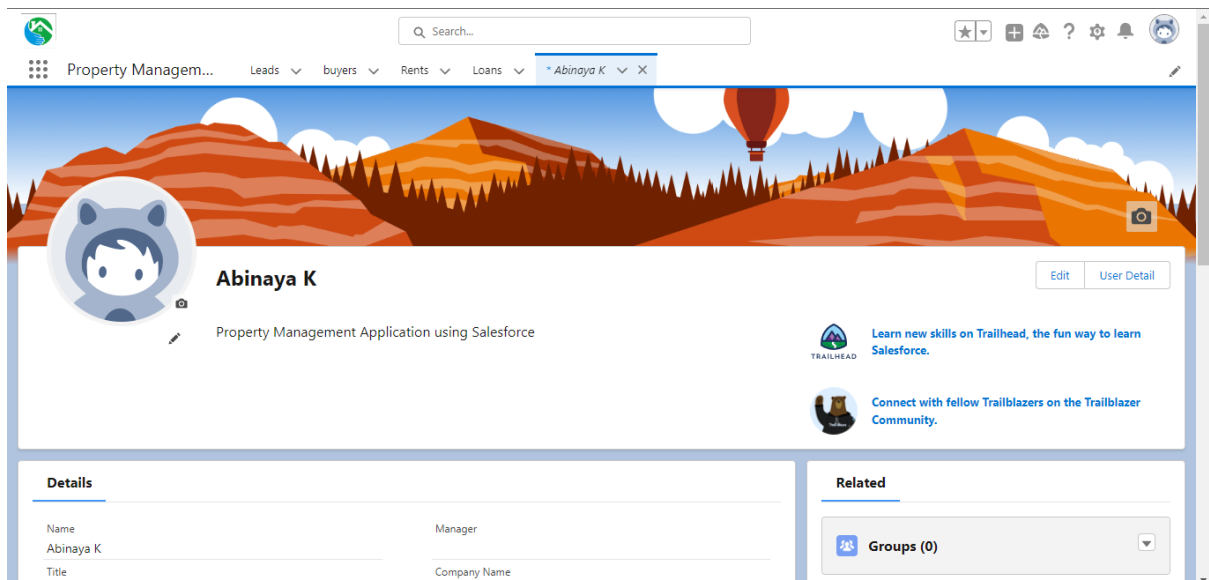


The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the 'Loan' object. The 'Fields & Relationships' tab is selected, displaying a list of 9 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Annual Loan, Created By, Interest Rate, Last Modified By, Loan Id, Loan Name, Owner, and Term. The 'Loan Id' field is highlighted as the primary key.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Id	Loan_Id__c	Auto Number		
Loan Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Term	Term__c	Number(18, 0)		

## Profile

### Creation On Profile



The screenshot shows the Salesforce profile page for 'Abinaya K'. The profile is associated with the 'Property Management' application. The profile includes a profile picture, a name, and a title. The 'Details' section shows the user's name as 'Abinaya K' and their title as 'Manager'. The 'Related' section shows 'Groups (0)'. The profile also includes a 'Trailhead' badge and a link to 'Learn new skills on Trailhead, the fun way to learn Salesforce.'.

**Details**

Name	Abinaya K
Title	Manager

**Related**

Groups (0)



# User

The screenshot displays the Salesforce Setup page with the 'Users' section selected in the left-hand navigation menu. The main content area is titled 'All Users' and includes instructions on how to manage users. Below the instructions, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A table lists existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The listed users include Chatter Expert, K\_Abinava, K\_Abinava, User Integration, and User Security.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d2w00000raadea3.y9m9e2d879o0@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	K_Abinava	AK	abi123@college.com		✓	System Administrator
<a href="#">Edit</a>	K_Abinava	Pinky	abinavaindhira03@gmail.com		✓	Cross Org Data Proxy User
<a href="#">Edit</a>	User Integration	inteq	integration@00d2w00000raadea3.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d2w00000raadea3.com		✓	Analytics Cloud Security User

## Permission Sets

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below this, the main header area contains tabs for "Setup", "Home", and "Object Manager". A left-hand sidebar lists navigation options: "perm" (with a search icon), "Users", "Permission Set Groups", "Permission Sets" (highlighted with a blue bar), "Custom Code", and "Custom Permissions". The main content area is titled "SETUP Permission Sets" and contains introductory text about creating, viewing, and managing permission sets. It also provides links to download the SalesforceA mobile app. Below the text is a filter dropdown set to "All Permission Sets" and buttons for "Edit | Delete | Create New View". A table lists various permission sets, each with a checkbox, an action link (e.g., Clone), a label, a description, and a license type.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cen...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/> Del   Clone	Experience Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloca...	Facility Manager

# Create OWD Setting

Search Setup

★

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🔄

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⚙️

🔔

👤

Manager

SETUP

Sharing Settings

Sharing Settings

Help for this Page

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

Organization-Wide Defaults

Organization-Wide Defaults Help

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	✓

# Reports

Search...

★

+

🔄

?

⚙️

🔔

👤

Property Managem...

Leads

buyers

Rents

Loans

Reports

Reports

All Reports

4 items

Search all reports...

New Report

New Folder

⚙️

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Loans		Private Reports	Abinaya K	27/3/2023, 8:47 pm	
Created by Me	New Apples Report		Private Reports	Abinaya K	26/3/2023, 6:54 pm	
Private Reports	New buyers Report		Private Reports	Abinaya K	26/3/2023, 6:57 pm	
Public Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	24/3/2023, 10:50 am	

FOLDERS

All Folders

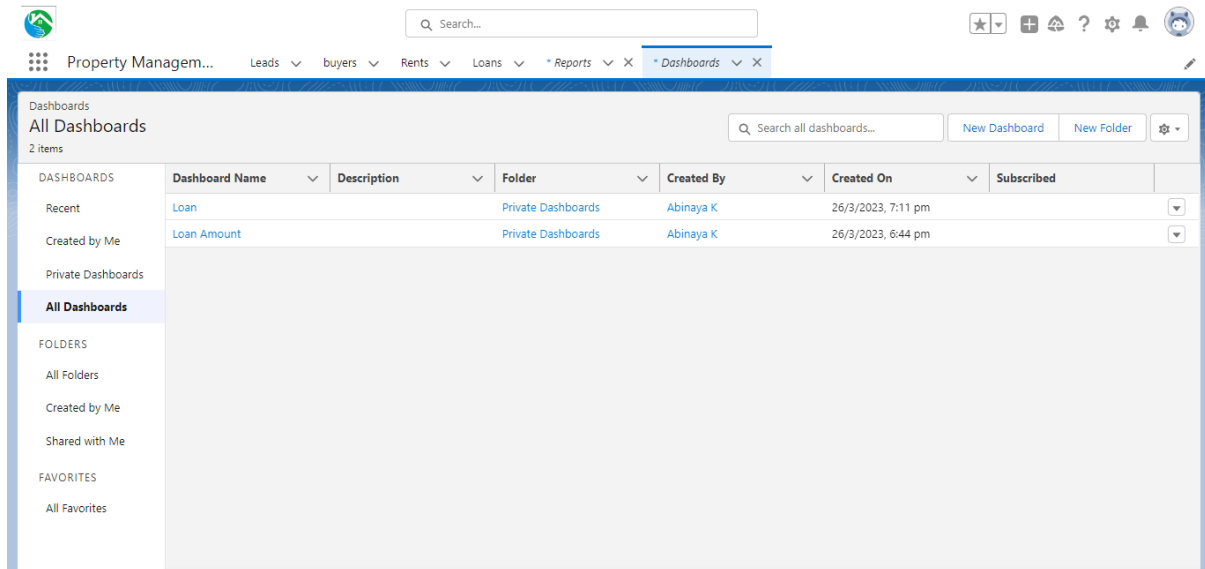
Created by Me

Shared with Me

FAVORITES

All Favorites

# Dashboard



## 4.Trailhead Profile public URL

Team Lead- <https://trailblazer.me/id/akrishna542>

Team member 1- <https://trailblazer.me/id/abirami0202>

Team member 2- <https://trailblazer.me/id/ani26>

Team member 3- <https://trailblazer.me/id/atms2>

Team member 4- <https://trailblazer.me/id/vvashwathi>

## 5.ADVANTAGES & DISADVANTAGES:

### 1.Reduce stress

Specialists dealing with 24/7 property problems, emergency repairs, late payments, evictions, less stress for customer.

## **2.More Freedom**

Property managers save a lot of time. If you hire a property manager, you can travel anywhere you want without having to worry about your customer and about the regular inspections.

## **3.Less legal problems**

Experienced landlords are aware of the fact that a single bad customer can cause a great deal of financial and legal headaches.

## **4.Lower Maintenance costs**

Customer are always happy if you offer them good maintenance. Having established working relationships can also lead to lower rates and discounts.

## **APPLICATION:**

Provides a management model:

The application takes into consideration the best management practices, which allows it to consolidate the way in which its team of collaborators works and carry out a more complete and detailed management.

Everything in one single system:

Integrates in one single application the modules that usually exist separately. The client accesses all the modules that it needs to manage the real estate business in an integral manner.

Maximum availability and security:

The application is built and operates with the best technology in the world: Salesforce.

Permanent access from anywhere:

Access to the application at anytime from anywhere and with any device connected to Internet.

## **CONCLUSION:**

In aggregate, the real estate makes a strong case for customer-focused property management. It offers compelling evidence that treating tenants as valued customers can improve the financial performance of income-producing properties and put the real estate investors who own them in a better position to take advantage of emerging market trends. Property management has long been overlooked in the real estate industry.