

PROJECT REPORT TEMPLATE

1 Introduction

1.1 Overview

The Property Management applications which we will build in this course. We will learn about the custom object which we will create for our Property Management applications. We will also learn about integrating authorize.net payment gateway system with Salesforce in order to process the payments made by our renter. The rental industry is on the rise, and property management is growing to meet it. Salesforce, already the world leader in CRM technology, has long been used as a superior real estate management system, making CRM for real estate a reality. And now, thanks to specialized applications built on the Salesforce Platform and incorporating the most advanced AI available, you can those tools to manage your data, guide your tenants, and optimize your property management but Yours renters need more than just—they need a property manager they know they can trust. With real estate management software from Salesforce, You can give your renters the support they need. Contact Salesforce today and start building relationships.

1.2 Purpose

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 & Design Thinking

2.1 Empathy Map



Empathy map

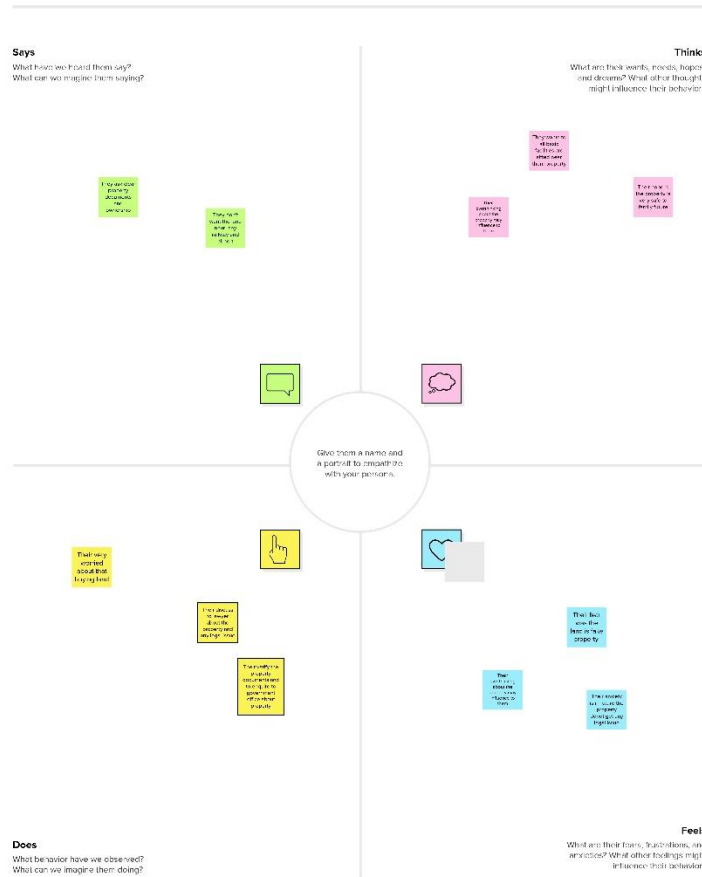
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

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Build empathy

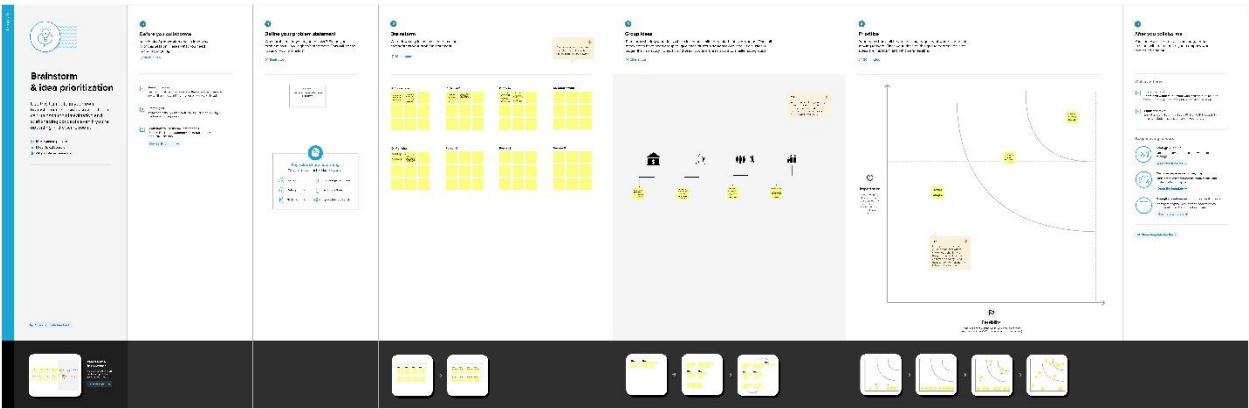
The information you add here should be representative of the observations and research you've done about your users.



Need some inspiration?
See a finished version of this template to kickstart your work.
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2.2 Ideation & Brainstorming Map

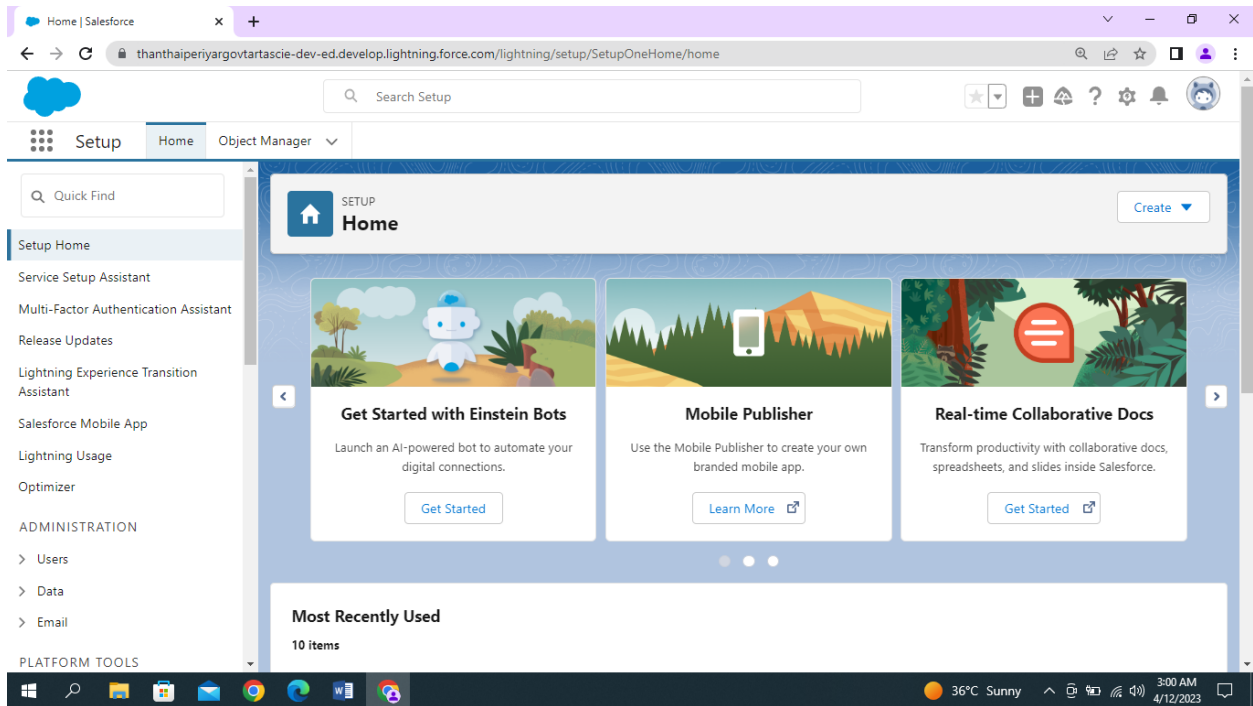


3 Result

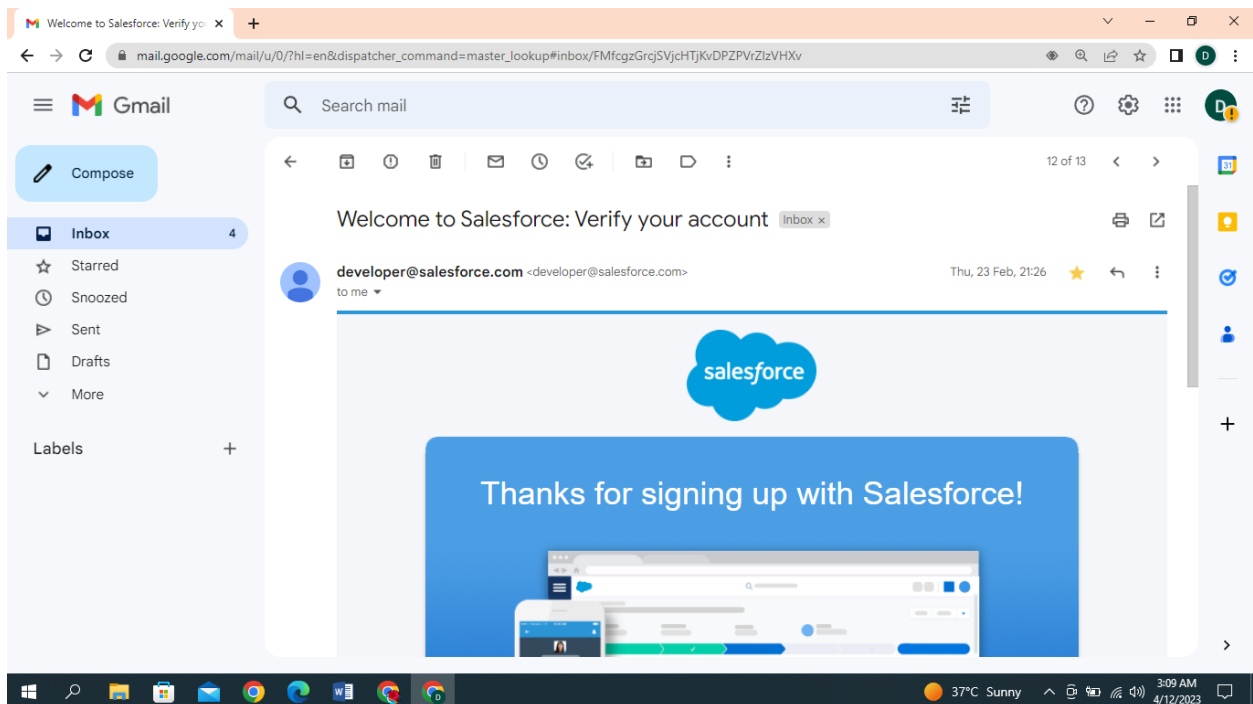
Object name	Filled in the object	
Lead	Field label	Data type
	City	Auto Number
	Email	Email
Buy	Field label	Data type
	City	Auto number
	Discount	Percentage
Loan	Field label	Data type
	Loan Id	Auto number
	Interest Rate	Currency
Rent	Field label	Data type
	Rental City	Text
	BHK type	Auto number

3.2 Activity & Screenshot

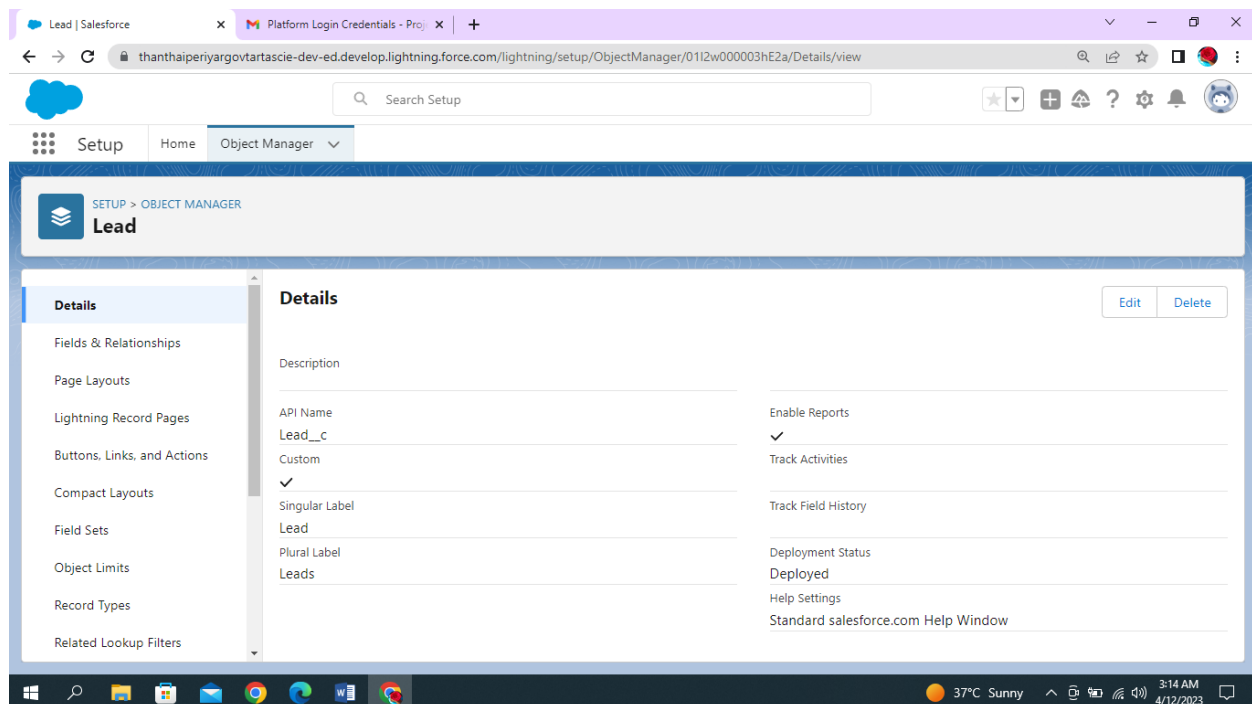
Activity - 1 Creating Developer Account



Activity - 2 Account Activation

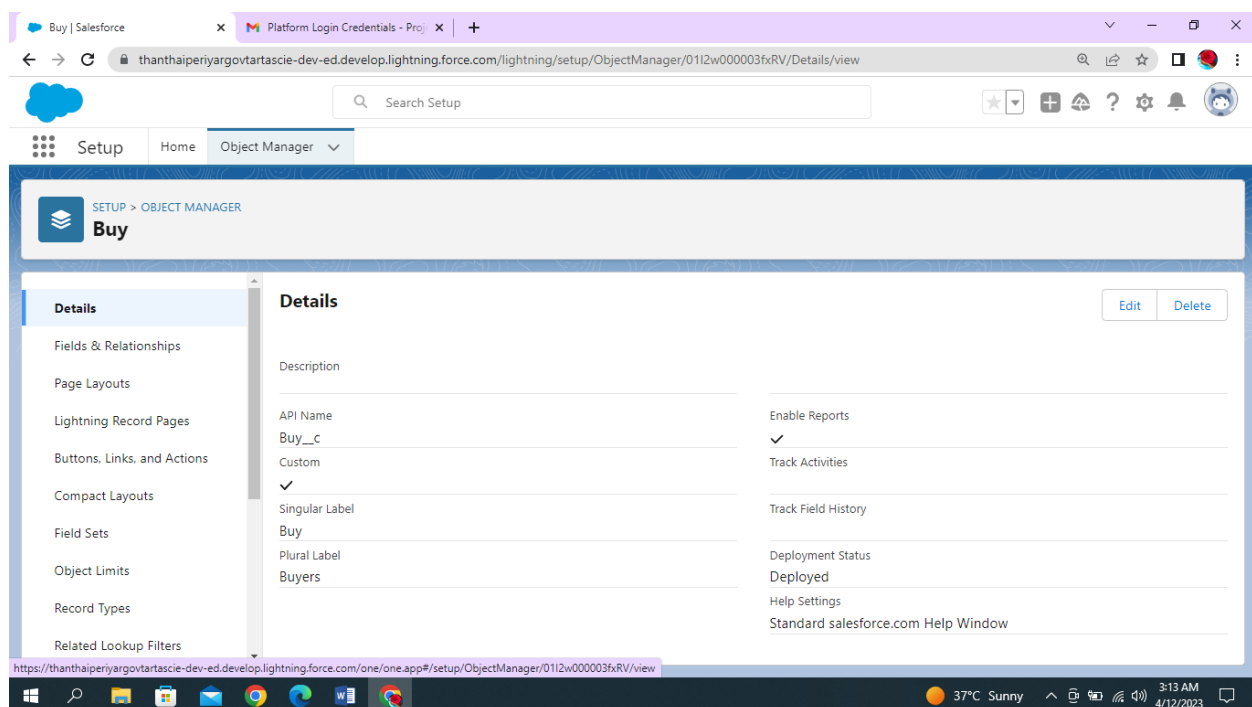


Activity - 3 Create Object Lead



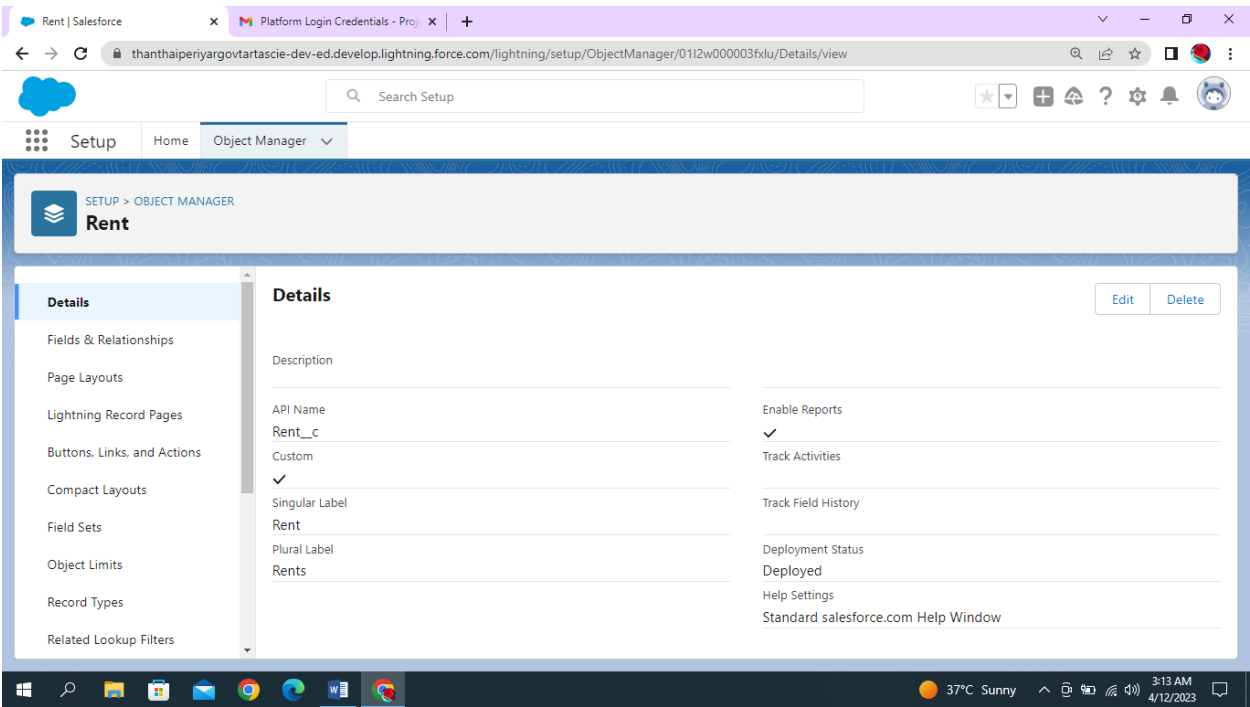
The screenshot shows the Salesforce Setup interface for the 'Lead' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and includes a description field, API Name (Lead__c), Custom checkbox (checked), Singular Label (Lead), Plural Label (Leads), and a list of settings: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. The top navigation bar shows 'Setup' and 'Object Manager'. The bottom status bar displays the date and time as 3:14 AM on 4/12/2023.

Activity - 4 Create Object Buy



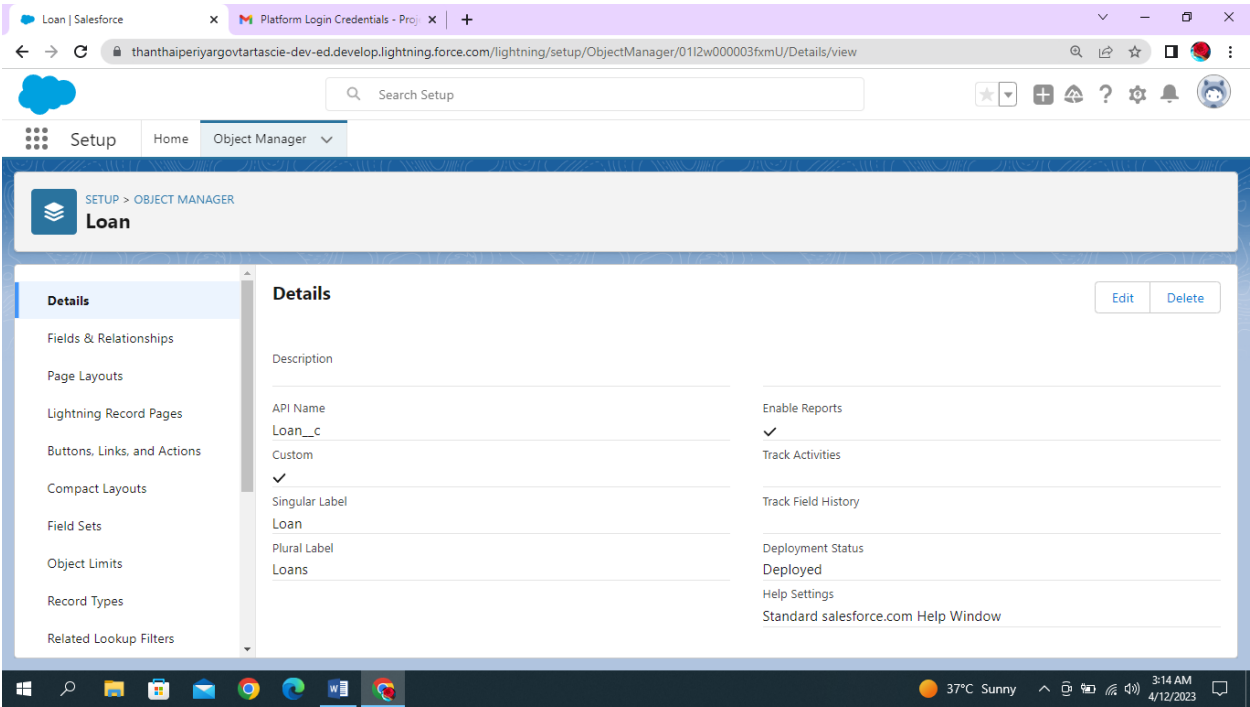
The screenshot shows the Salesforce Setup interface for the 'Buy' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and includes a description field, API Name (Buy__c), Custom checkbox (checked), Singular Label (Buy), Plural Label (Buyers), and a list of settings: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. The top navigation bar shows 'Setup' and 'Object Manager'. The bottom status bar displays the date and time as 3:13 AM on 4/12/2023.

Activity - 5 Create Object Rent



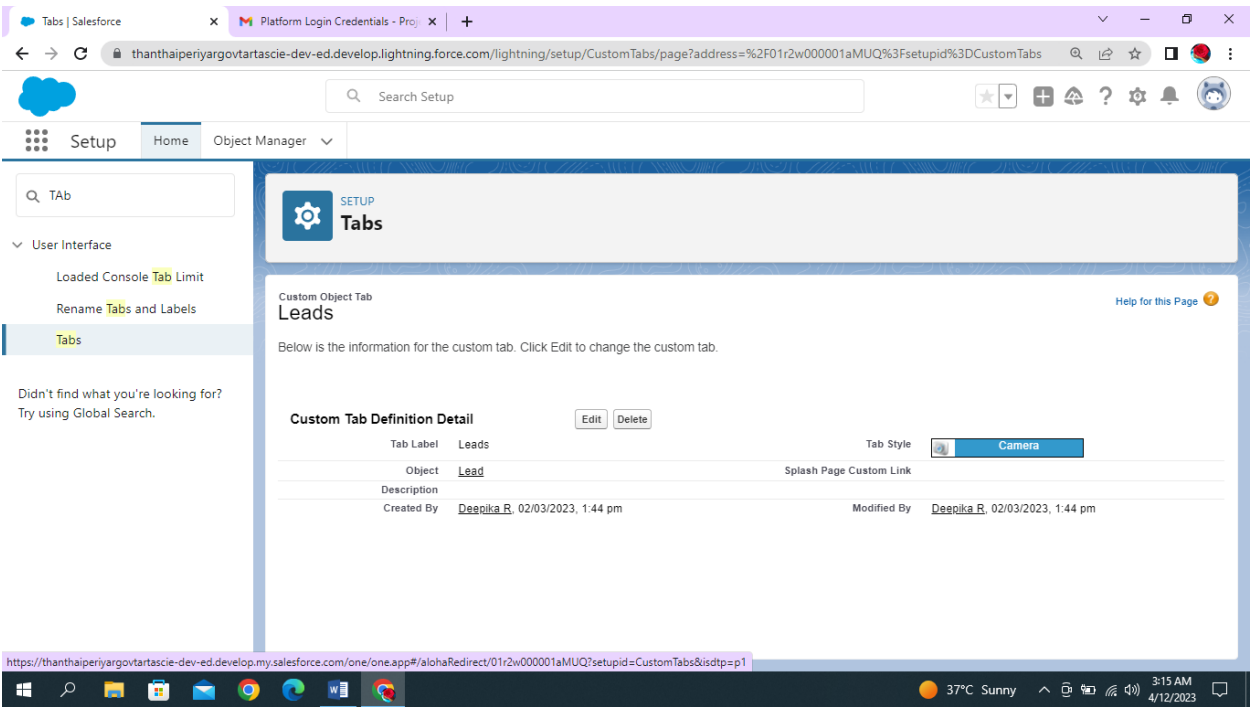
The screenshot shows the Salesforce Setup interface for the 'Rent' object. The left sidebar contains a navigation menu with the following items: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and includes a 'Description' field, an 'API Name' field with the value 'Rent_c', a 'Custom' checkbox that is checked, a 'Singular Label' field with the value 'Rent', and a 'Plural Label' field with the value 'Rents'. On the right side of the details section, there are several toggle switches: 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (unchecked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the top right of the details section, there are 'Edit' and 'Delete' buttons. The bottom of the screen shows a Windows taskbar with various application icons and a system tray displaying the temperature as 37°C, the weather as Sunny, and the time as 3:13 AM on 4/12/2023.

Activity - 6 Create Object Loan



The screenshot shows the Salesforce Setup interface for the 'Loan' object. The left sidebar contains a navigation menu with the following items: Details (selected), 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 'Details' and includes a 'Description' field, an 'API Name' field with the value 'Loan_c', a 'Custom' checkbox that is checked, a 'Singular Label' field with the value 'Loan', and a 'Plural Label' field with the value 'Loans'. On the right side of the details section, there are several toggle switches: 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (unchecked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the top right of the details section, there are 'Edit' and 'Delete' buttons. The bottom of the screen shows a Windows taskbar with various application icons and a system tray displaying the temperature as 37°C, the weather as Sunny, and the time as 3:14 AM on 4/12/2023.

Activity - 7 Create Lighting Tab (Lead)

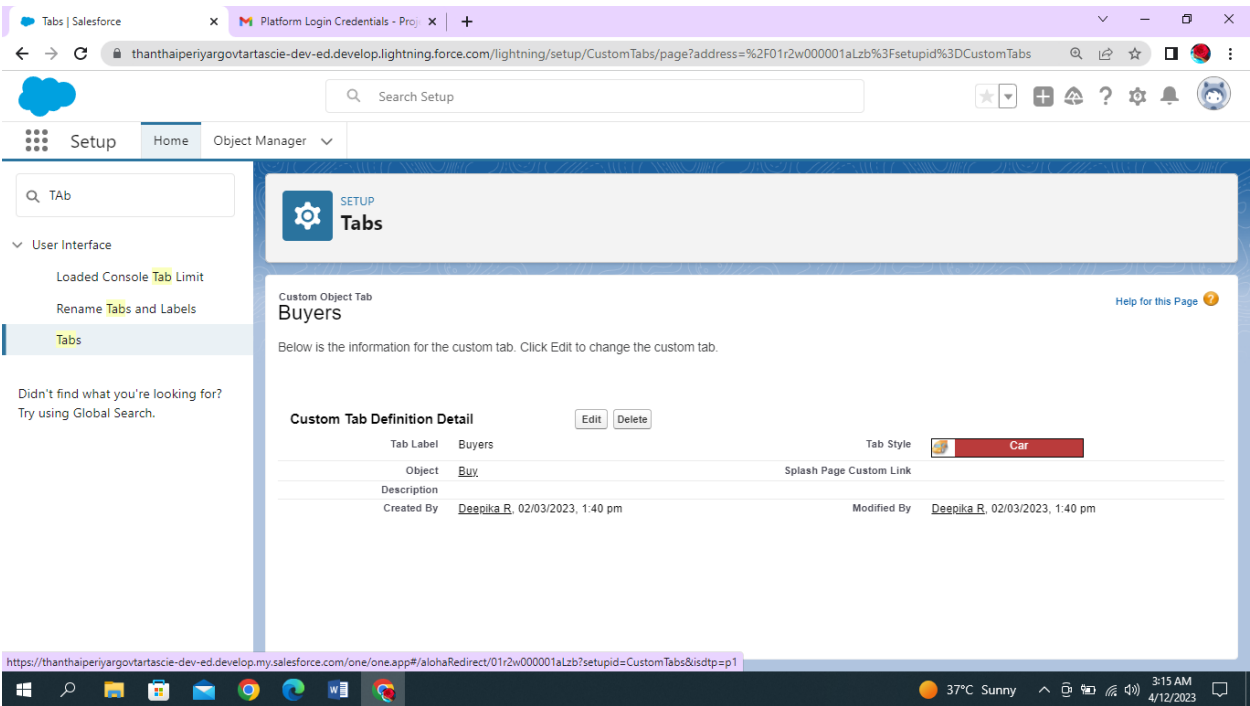


The screenshot shows the Salesforce Setup page for a Custom Object Tab named "Leads". The left sidebar contains a search bar with "Tab" entered and a list of options under "User Interface": "Loaded Console Tab Limit", "Rename Tabs and Labels", and "Tabs" (which is selected). The main content area has a header "SETUP Tabs" and a sub-header "Custom Object Tab Leads". Below this, it says "Below is the information for the custom tab. Click Edit to change the custom tab." The "Custom Tab Definition Detail" section includes a table with the following information:

Tab Label	Leads	Tab Style	Camera
Object	Lead	Splash Page Custom Link	
Description			
Created By	Deepika R. 02/03/2023, 1:44 pm	Modified By	Deepika R. 02/03/2023, 1:44 pm

The browser address bar shows the URL: <https://thanthaperiyargovtartascie-dev-ed.develop.my.salesforce.com/lightning/setup/CustomTabs/page?address=%2F01r2w000001aMUQ%3Fsetupid%3DCustomTabs>. The taskbar at the bottom shows the system clock as 3:15 AM on 4/12/2023.

Activity - 8 Create the Lighting Tab (Buy)

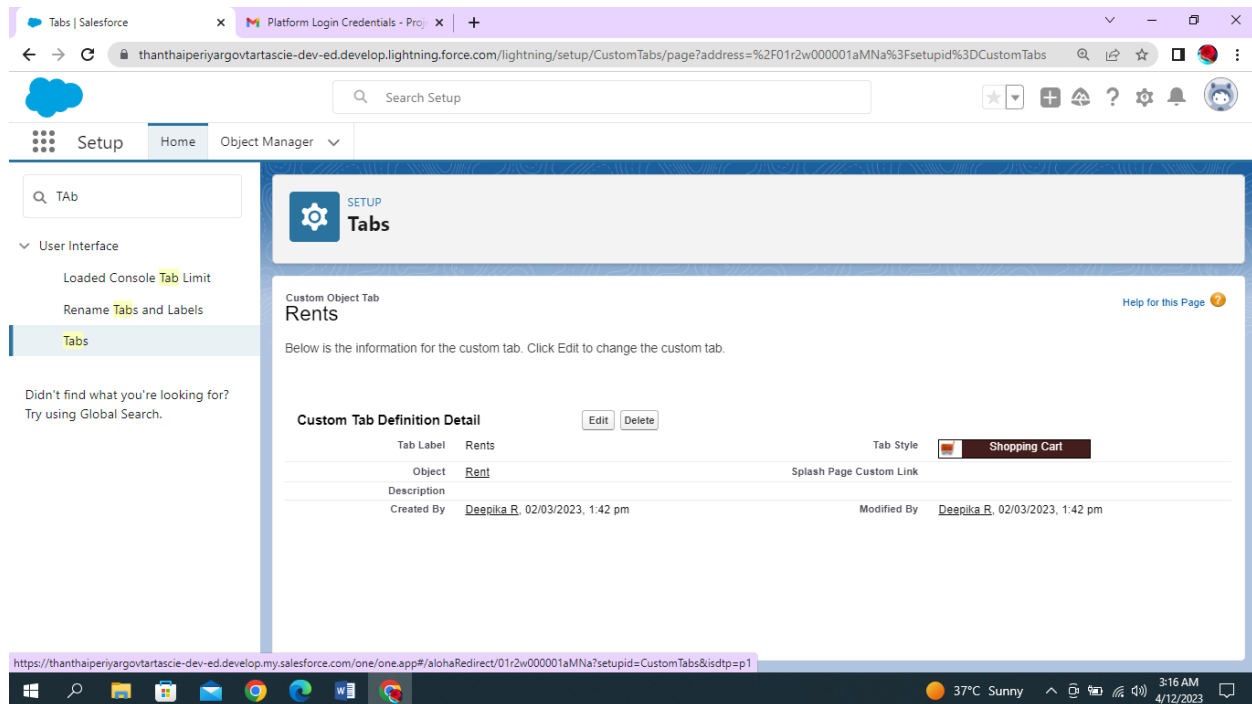


The screenshot shows the Salesforce Setup page for a Custom Object Tab named "Buyers". The left sidebar contains a search bar with "Tab" entered and a list of options under "User Interface": "Loaded Console Tab Limit", "Rename Tabs and Labels", and "Tabs" (which is selected). The main content area has a header "SETUP Tabs" and a sub-header "Custom Object Tab Buyers". Below this, it says "Below is the information for the custom tab. Click Edit to change the custom tab." The "Custom Tab Definition Detail" section includes a table with the following information:

Tab Label	Buyers	Tab Style	Car
Object	Buy	Splash Page Custom Link	
Description			
Created By	Deepika R. 02/03/2023, 1:40 pm	Modified By	Deepika R. 02/03/2023, 1:40 pm

The browser address bar shows the URL: <https://thanthaperiyargovtartascie-dev-ed.develop.my.salesforce.com/one/app#/alohaRedirect/01r2w000001aLzb?setupid=CustomTabs&isdt=p1>. The taskbar at the bottom shows the system clock as 3:15 AM on 4/12/2023.

Activity - 9 Create the Lighting Tab (Rent)



The screenshot shows the Salesforce Setup page for a custom tab named 'Rents'. The left sidebar shows the 'Setup' menu with 'User Interface' expanded, and 'Rents' selected under 'Custom Tabs'. The main content area displays the 'Custom Object Tab' configuration for 'Rents'.

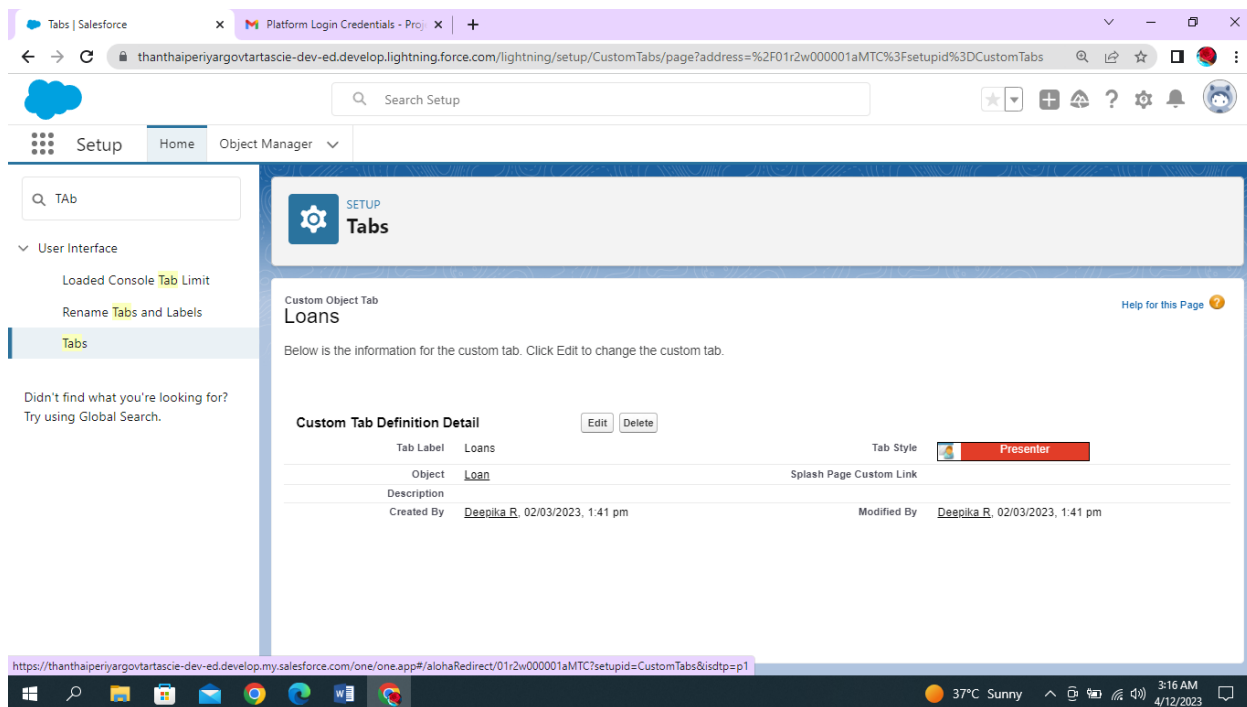
Custom Object Tab: Rents

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Rents	Tab Style	Shopping Cart
Object	Rent	Splash Page Custom Link	
Description			
Created By	Deepika R. 02/03/2023, 1:42 pm	Modified By	Deepika R. 02/03/2023, 1:42 pm

Activity - 10 Create the Lighting Tab (Loan)



The screenshot shows the Salesforce Setup page for a custom tab named 'Loans'. The left sidebar shows the 'Setup' menu with 'User Interface' expanded, and 'Loans' selected under 'Custom Tabs'. The main content area displays the 'Custom Object Tab' configuration for 'Loans'.

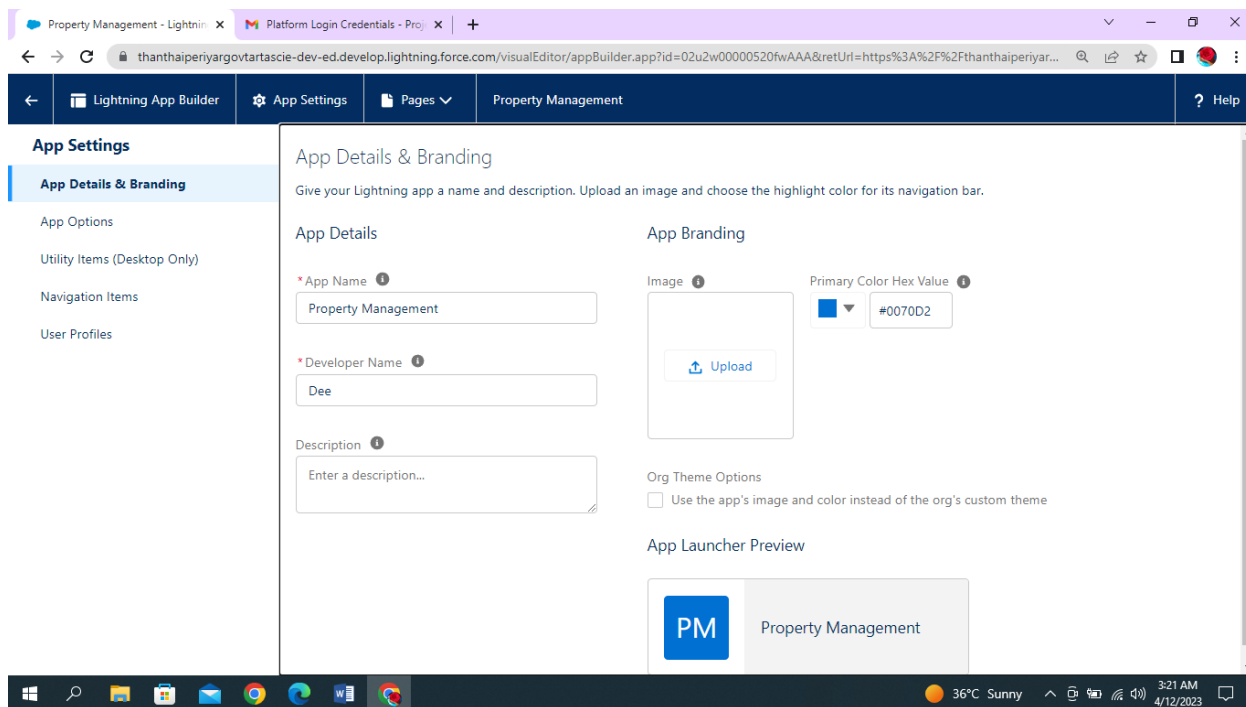
Custom Object Tab: Loans

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Loans	Tab Style	Presenter
Object	Loan	Splash Page Custom Link	
Description			
Created By	Deepika R. 02/03/2023, 1:41 pm	Modified By	Deepika R. 02/03/2023, 1:41 pm

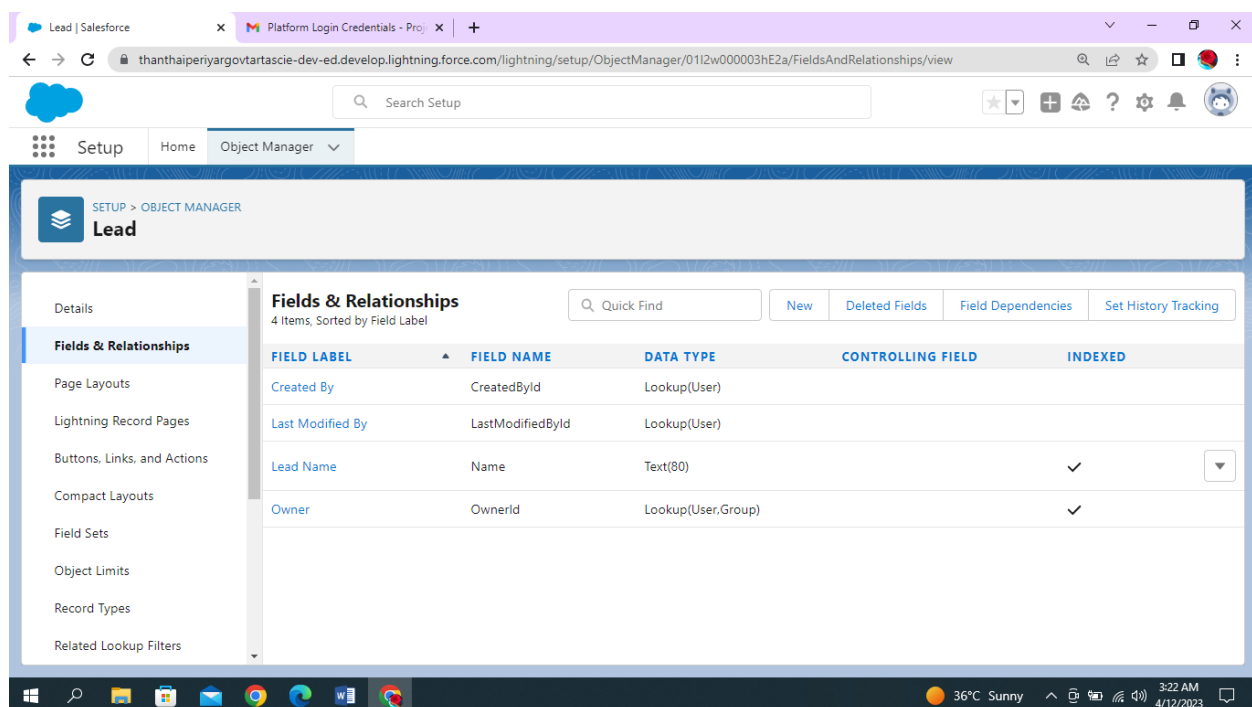
Activity - 11 Create the Lighting App



The screenshot shows the Lightning App Builder interface. The left sidebar contains the following menu items: App Settings, App Details & Branding (selected), App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles. The main content area is titled "App Details & Branding" and includes the following sections:

- App Details:**
 - App Name:** Property Management
 - Developer Name:** Dee
 - Description:** Enter a description...
- App Branding:**
 - Image:** Upload button
 - Primary Color Hex Value:** #0070D2
 - Org Theme Options:** ☐ Use the app's image and color instead of the org's custom theme
- App Launcher Preview:** Shows a preview of the app launcher with a blue square icon labeled "PM" and the text "Property Management".

Activity - 12 Create the Lead Field

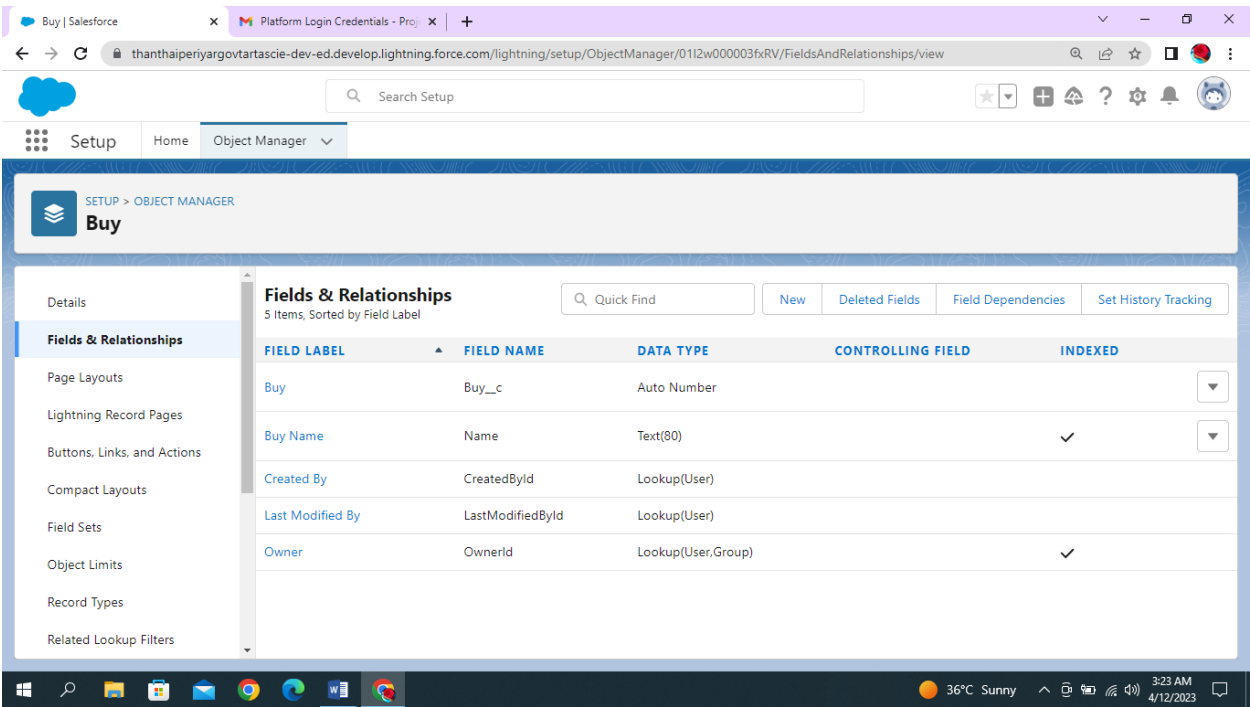


The screenshot shows the Salesforce Setup interface. The left sidebar contains the following menu items: Setup, Home, Object Manager (selected), Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled "Fields & Relationships" and includes the following sections:

- Fields & Relationships:** 4 Items, Sorted by Field Label. Includes a "Quick Find" search bar and buttons for "New", "Deleted Fields", "Field Dependencies", and "Set History Tracking".
- Table of Fields:**

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

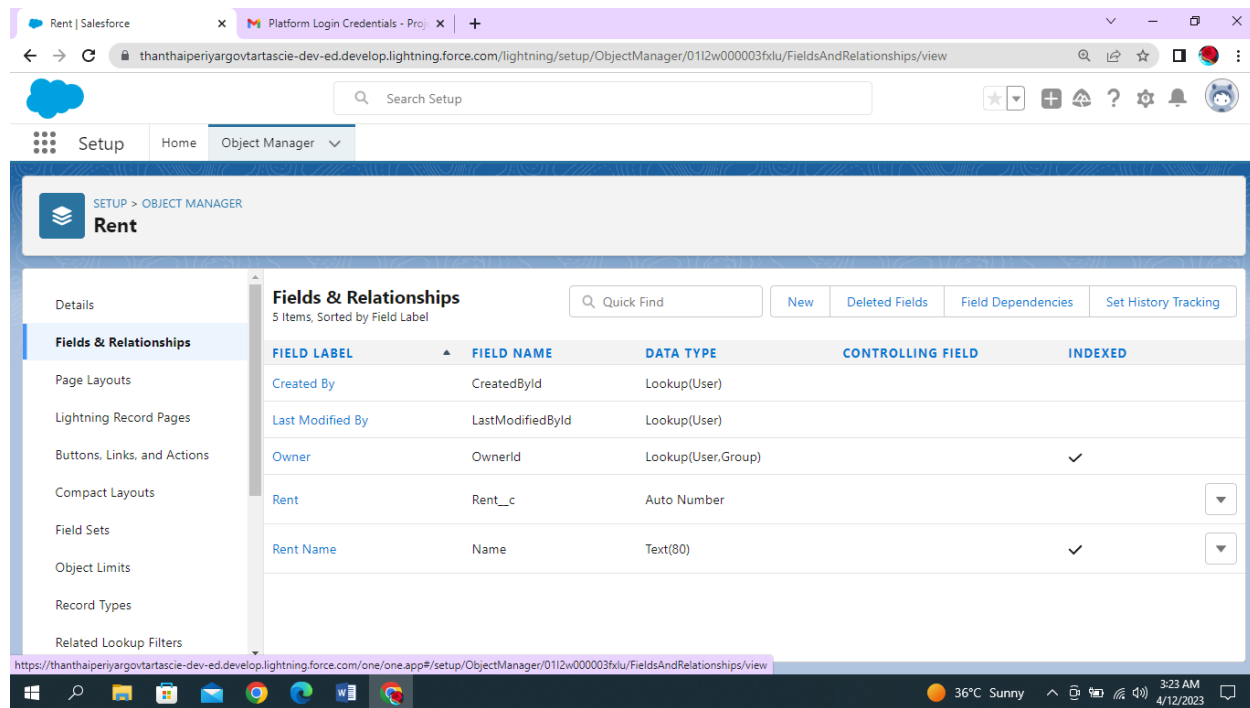
Activity - 13 Create the Field for Buy



The screenshot shows the Salesforce Setup interface for the 'Buy' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Buy (Auto Number), Buy Name (Text(80)), Created By (Lookup(User)), Last Modified By (Lookup(User)), and Owner (Lookup(User,Group)).

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

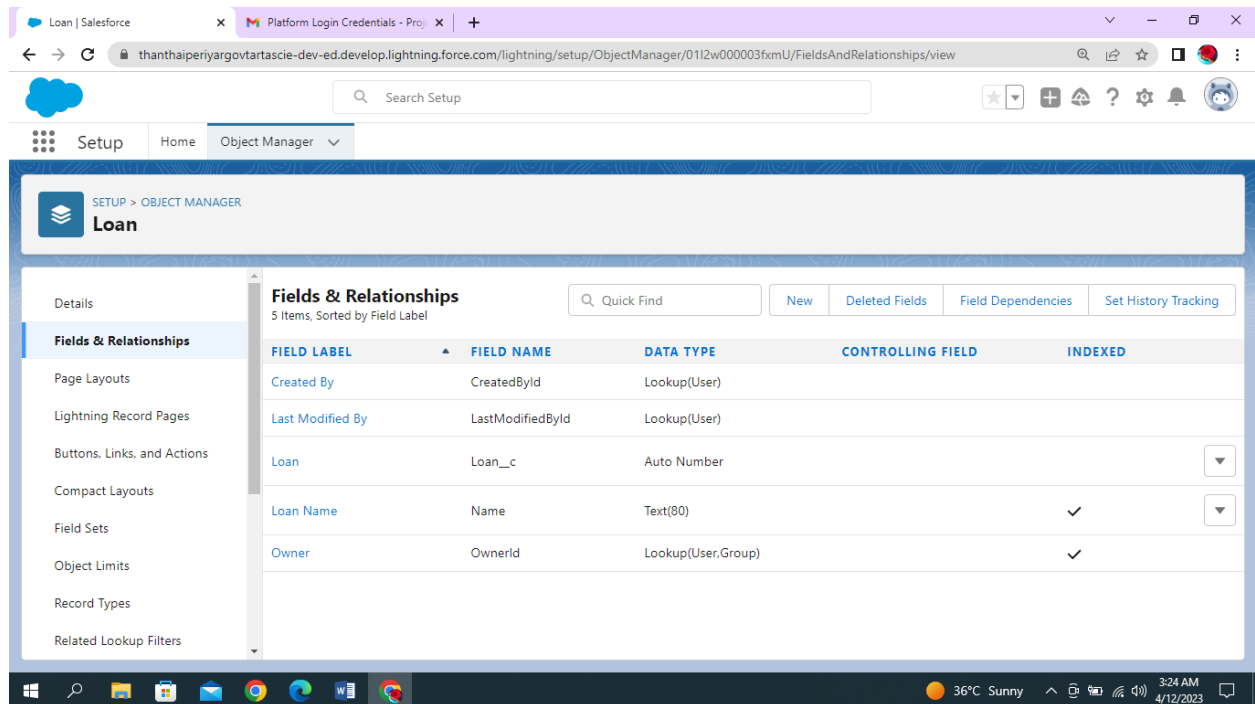
Activity - 14 Create Fields for Rent



The screenshot shows the Salesforce Setup interface for the 'Rent' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), Rent (Auto Number), and Rent Name (Text(80)).

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

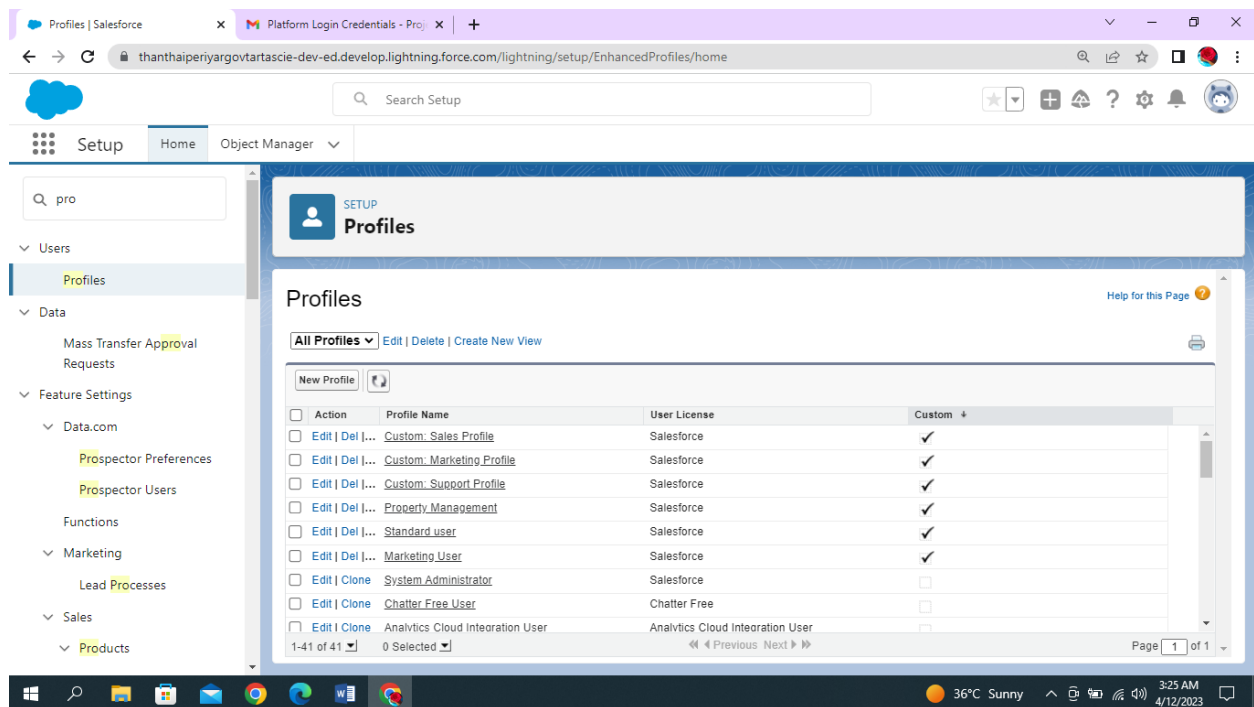
Activity - 15 Create Fields for Loan



The screenshot shows the Salesforce Setup interface for the 'Loan' object. The 'Fields & Relationships' section is active, displaying a list of fields. The table below represents the data shown in the interface.

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

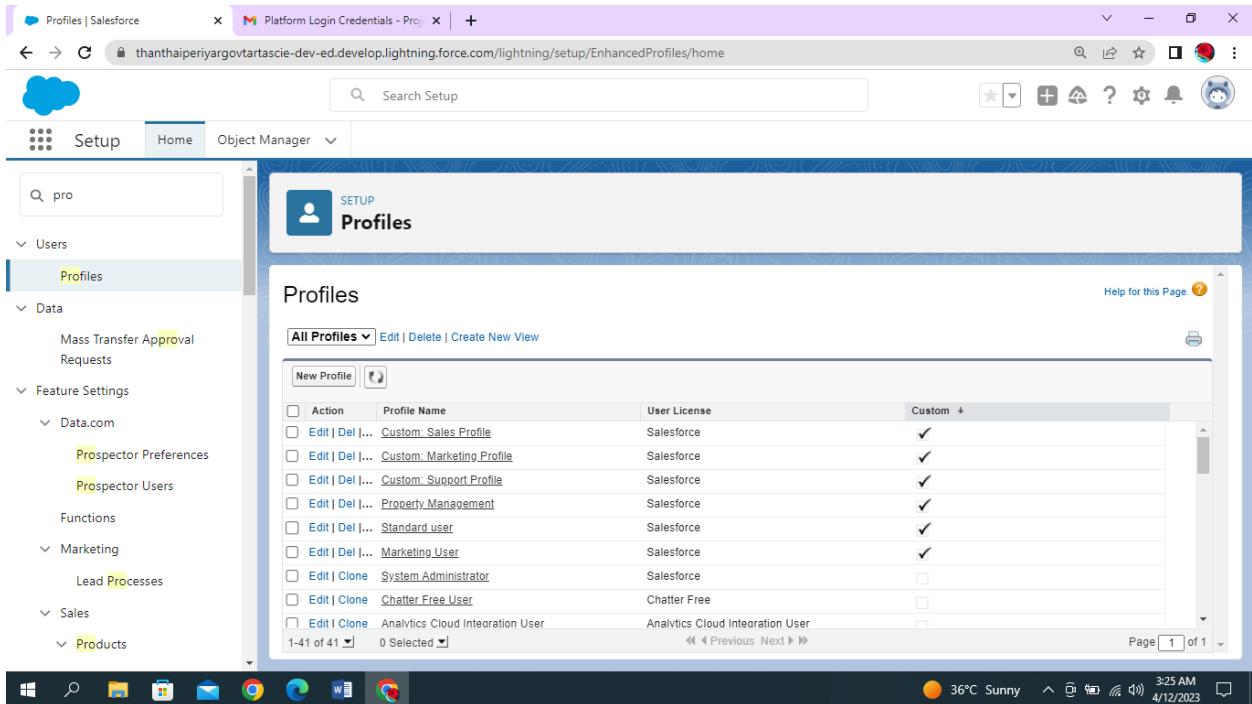
Activity - 16 To create a new profile for Sales Manager



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Profiles' table is displayed, showing existing profiles and their user licenses. The table below represents the data shown in the interface.

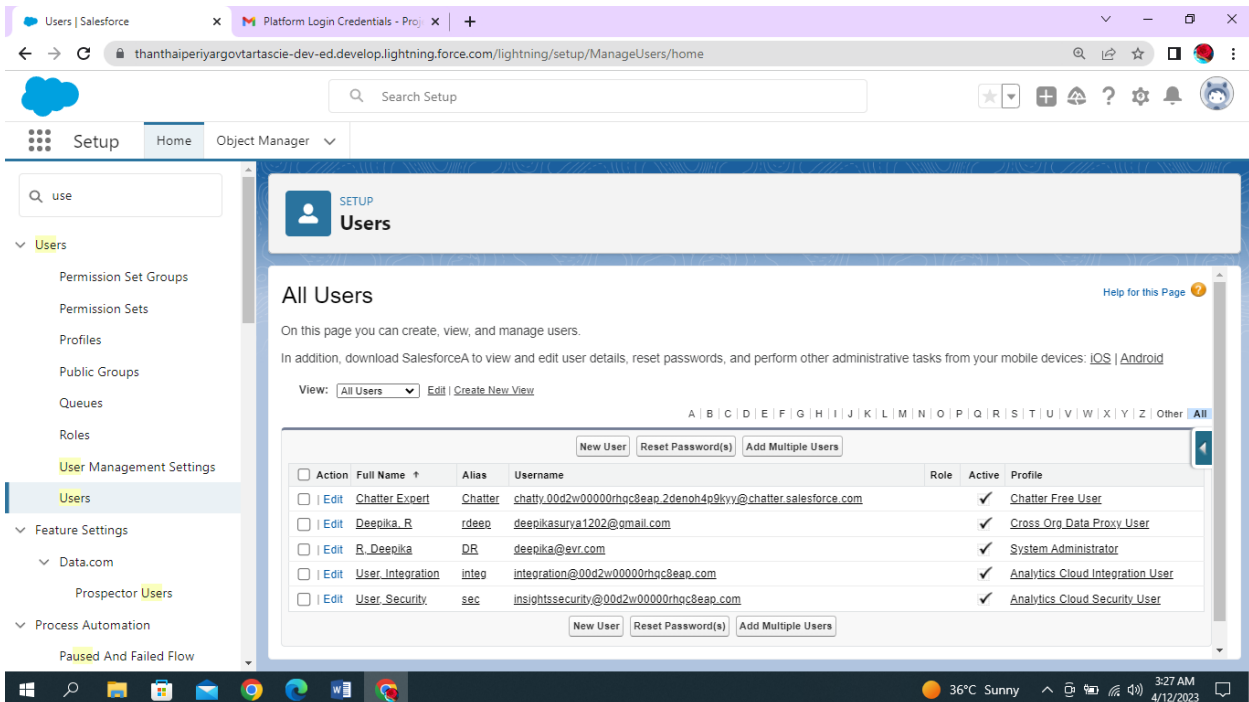
Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Custom: Sales Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Custom: Marketing Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Custom: Support Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Property Management	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Standard user	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Marketing User	Salesforce	✓
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	

Activity -17 To create a new profile for Marketing



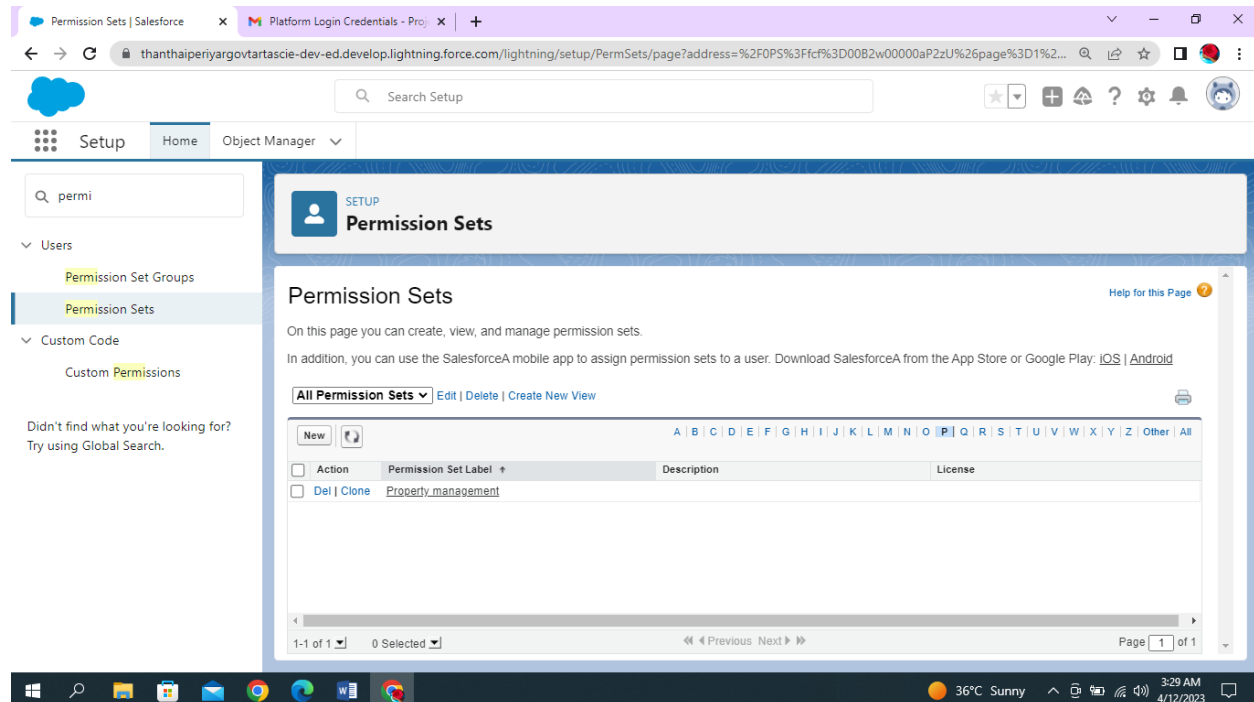
The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains a navigation menu with options like Users, Profiles, Data, Feature Settings, Data.com, Marketing, Sales, and Products. The main content area is titled 'Profiles' and shows a list of existing profiles. The 'All Profiles' view is selected, displaying a table with columns for Action, Profile Name, User License, and Custom. The table lists several profiles, including 'Custom: Sales Profile', 'Custom: Marketing Profile', 'Custom: Support Profile', 'Property Management', 'Standard user', 'Marketing User', 'System Administrator', 'Chatter Free User', and 'Analytics Cloud Integration User'. The 'Marketing User' profile is highlighted.

Activity - 18 Create New User



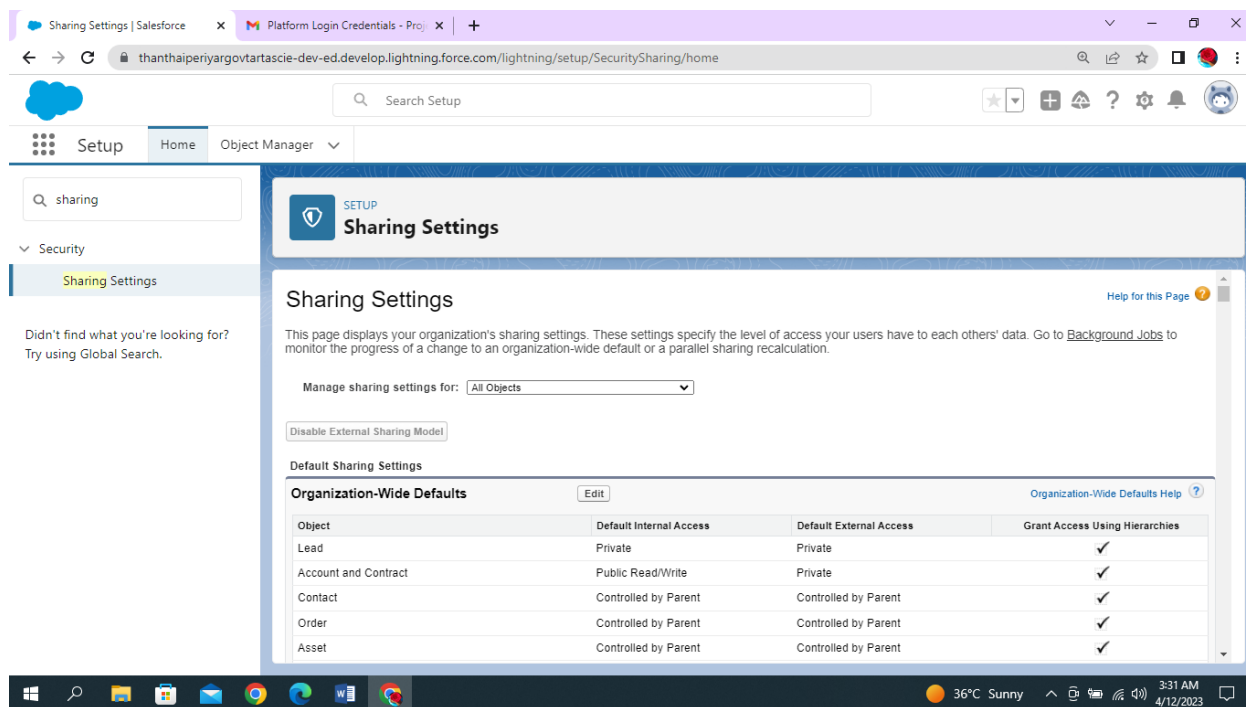
The screenshot shows the Salesforce Setup interface for Users. The left sidebar contains a navigation menu with options like Users, Profiles, Data, Feature Settings, Data.com, Marketing, Sales, and Products. The main content area is titled 'Users' and shows a list of existing users. The 'All Users' view is selected, displaying a table with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter Expert', 'Deeplika_R', 'R_Deelika', 'User Integration', and 'User Security'. The 'User Security' user is highlighted.

Activity - 19 Create the Permission Sets



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar with 'permi' and a list of items including 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Permission Sets' and includes a description: 'On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)'. Below the description is a table with columns: 'Action', 'Permission Set Label', 'Description', and 'License'. The table contains one entry: 'Del | Clone' with the label 'Property management'. The bottom of the page shows a taskbar with various application icons and system information: '36°C Sunny', '3:29 AM', and '4/12/2023'.

Activity - 20 Create OWD Setting

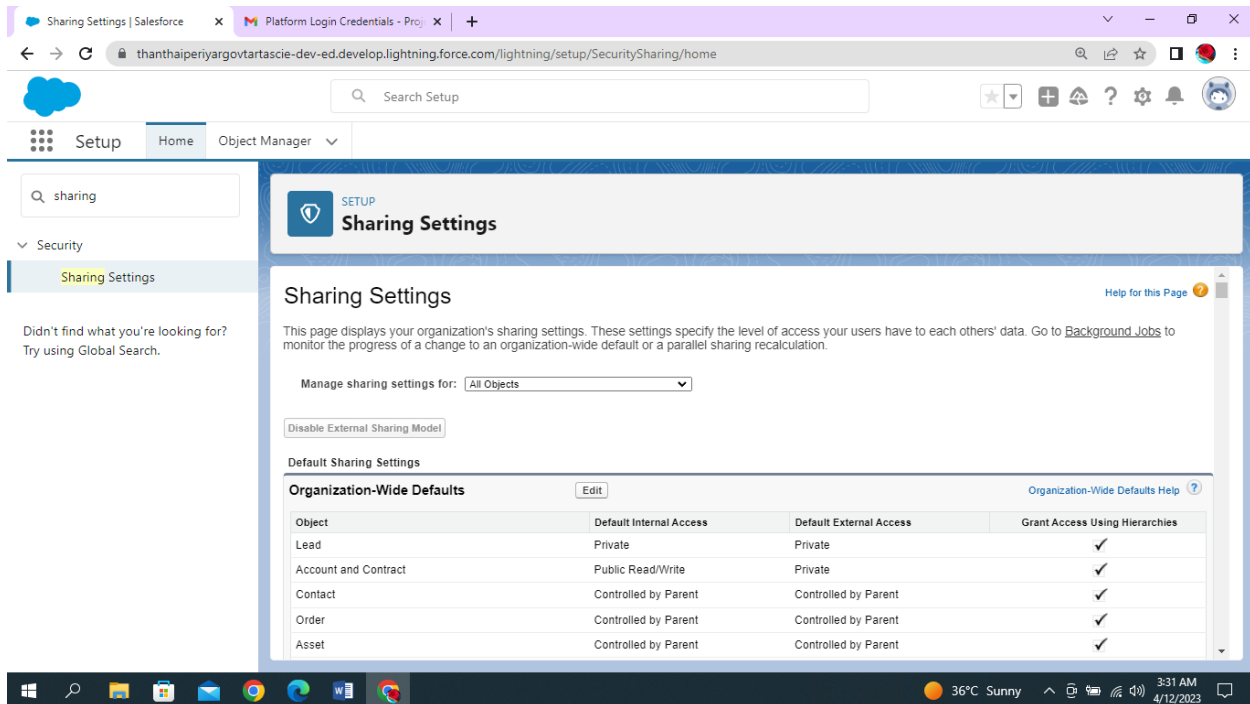


The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' section. The left sidebar contains a search bar with 'sharing' and a list of items including 'Security' and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and includes a description: 'This page displays 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.' Below the description is a section titled 'Default Sharing Settings' with a sub-section 'Organization-Wide Defaults'. This section contains a table with columns: 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The table lists several objects and their corresponding access settings.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	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	✓

The bottom of the page shows a taskbar with various application icons and system information: '36°C Sunny', '3:31 AM', and '4/12/2023'.

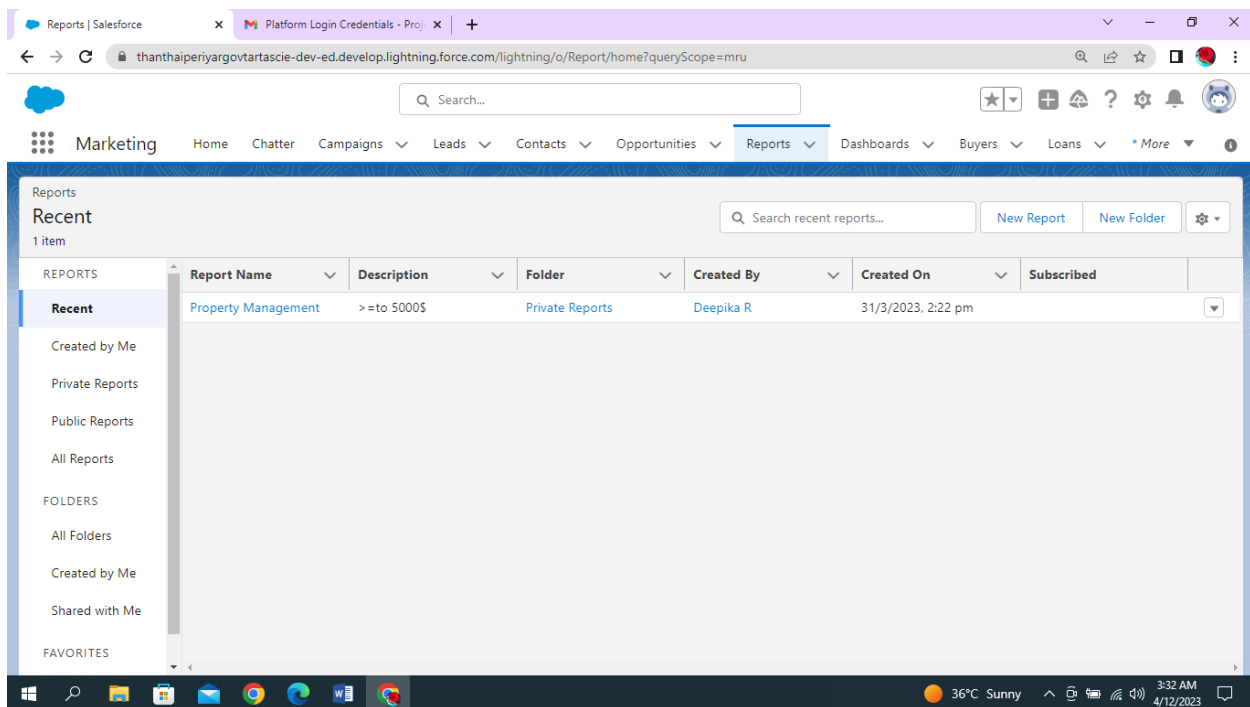
Activity - 21 Create OWD Setting for Marketing



The screenshot shows the Salesforce Sharing Settings page. The left sidebar contains a search bar with 'sharing' and a 'Security' section with 'Sharing Settings' selected. 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	Private	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	✓

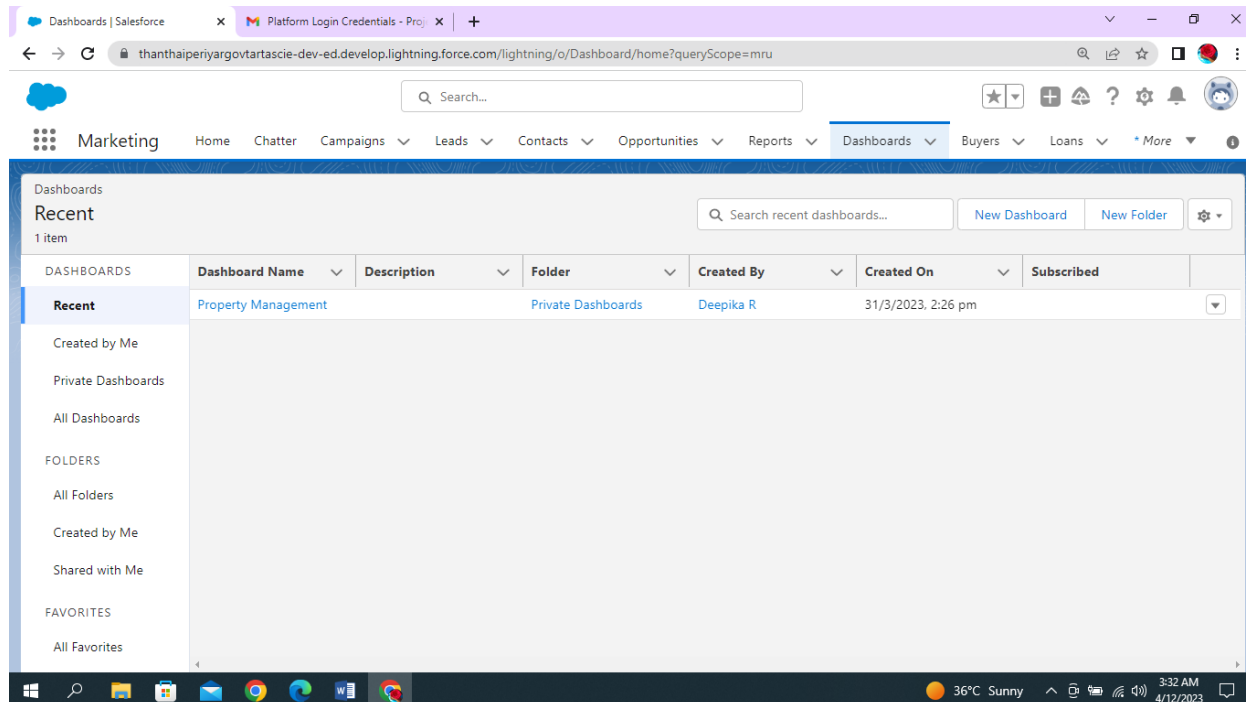
Activity - 22 Create Report



The screenshot shows the Salesforce Reports page. The left sidebar contains a 'Reports' section with 'Recent' selected. The main content area is titled 'Reports' and includes a search bar with 'Search recent reports...'. Below this is a table of recent reports.

Report Name	Description	Folder	Created By	Created On	Subscribed
Property Management	>= to 5000\$	Private Reports	Deepika R	31/3/2023, 2:22 pm	

Activity - 23 Create dashboards



4. Trailhead Profile Public URL

Team Leader: <https://trailblazer.me/id/anupk31>

Team Member 1: <https://trailblazer.me/id/deepr62>

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

Team Member 3: <https://trailblazer.me/id/monid18>

5. Advantages & Disadvantages

Advantages:

- Enterprises-level platform security that improves with each release
- Simplified templates-based document generation, tracking and approval
- Facilitated the rent collection/payment process
- Forecasting based on interaction history and automated report scheduling
- Simplified renewals and leases management
- Automated tenant notifications

Disadvantages:

- Lacks of specialists that have a deep understanding of property managements business and its priorities
- Higher price if you look not only for technical skills but for industry expertise, especially in specific niches like property management
- Need for continuous platform improvement and maintenance with each Salesforce release to ensure that all custom features work as it has been planned
- Creation of custom user training materials and workshops
- Documentation of every important product customization milestone.

7 Conclusion

Each property management company can take advantage of the platform in its unique way due to its scalability and flexibility. And even if you don't want to spend time tuning the standard functionality of Salesforce solutions for property management. Once you are ready to welcome Salesforce CRM into your real estate agency and simplify the process of its implementation, then our Salesforce consulting services will be the best fit for you. We, at Ascendix, are ready to take on any Salesforce-related challenges and successfully overcome them.

8. Future scope

- Property management is a booming industry, and it's only getting more competitive as the years go by.
- Property management companies have been positioned for growth, taking advantages of digital trends in order to reach a larger customer base
- This includes leveraging technology to streaming communication between landlords and tenants, as well as utilizing virtual tools to provide more efficient customers service.
- As you can see, the property management industry is constantly evolving and companies are finding new and innovative ways to stay ahead of the competition. By keeping up with the latest trends, companies can position themselves for growth in the future. Companies should take advantage of new technologies, strategies, and partnerships in order to create efficient and effective property management systems that will help them remain competitive in an ever-evolving market.

