

PROJECT REPORT

PROPERTY MANAGEMENT APPLICATION

1. INTRODUCTION

1.1 Overview

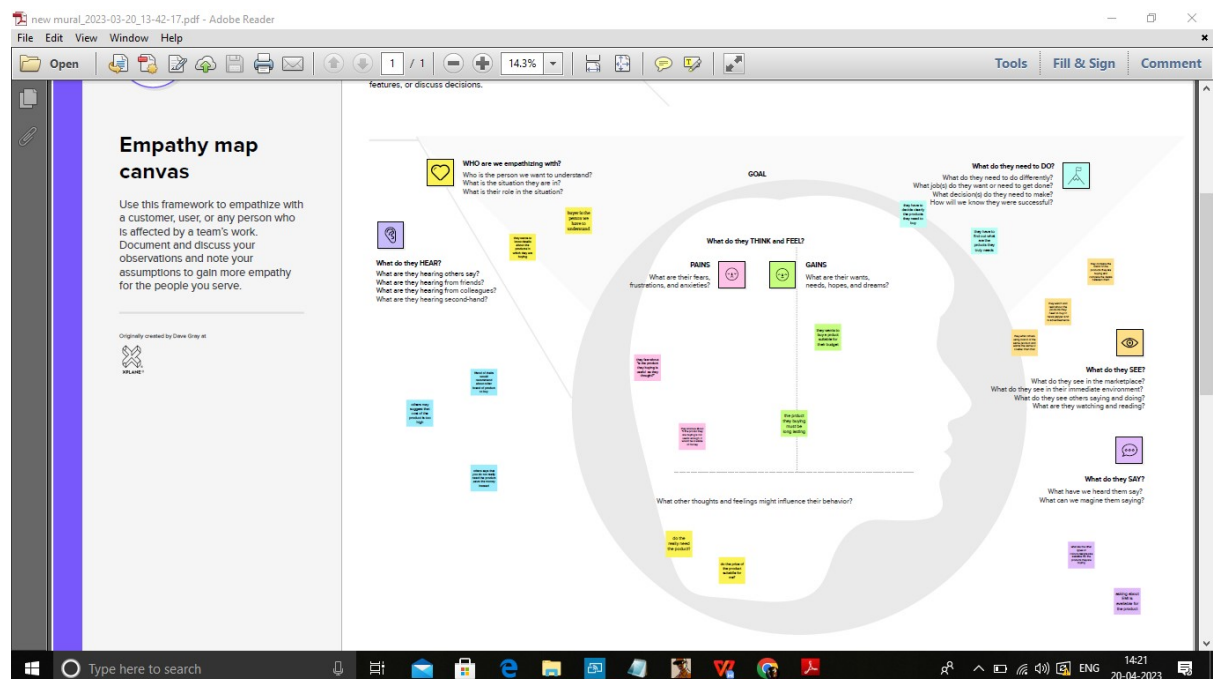
Property management is a complex process that involves multiple tasks such as tracking property details, lease agreements, tenant information, and maintenance activities. Salesforce is a powerful platform that can be used to create a comprehensive property management application.

1.2 Purpose

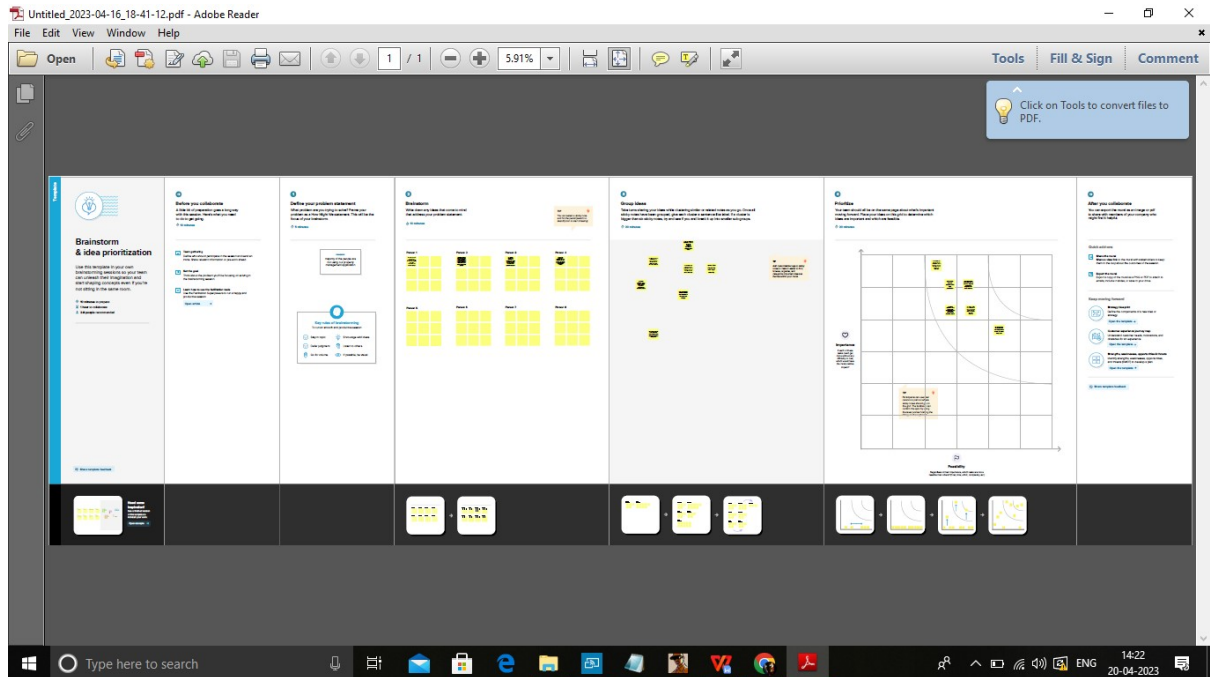
The purpose of this project is to create a property management application using Salesforce that can help property managers manage their properties more efficiently. The application will automate various tasks, such as tracking lease agreements, tenant information, and maintenance activities, to help save time and reduce errors.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



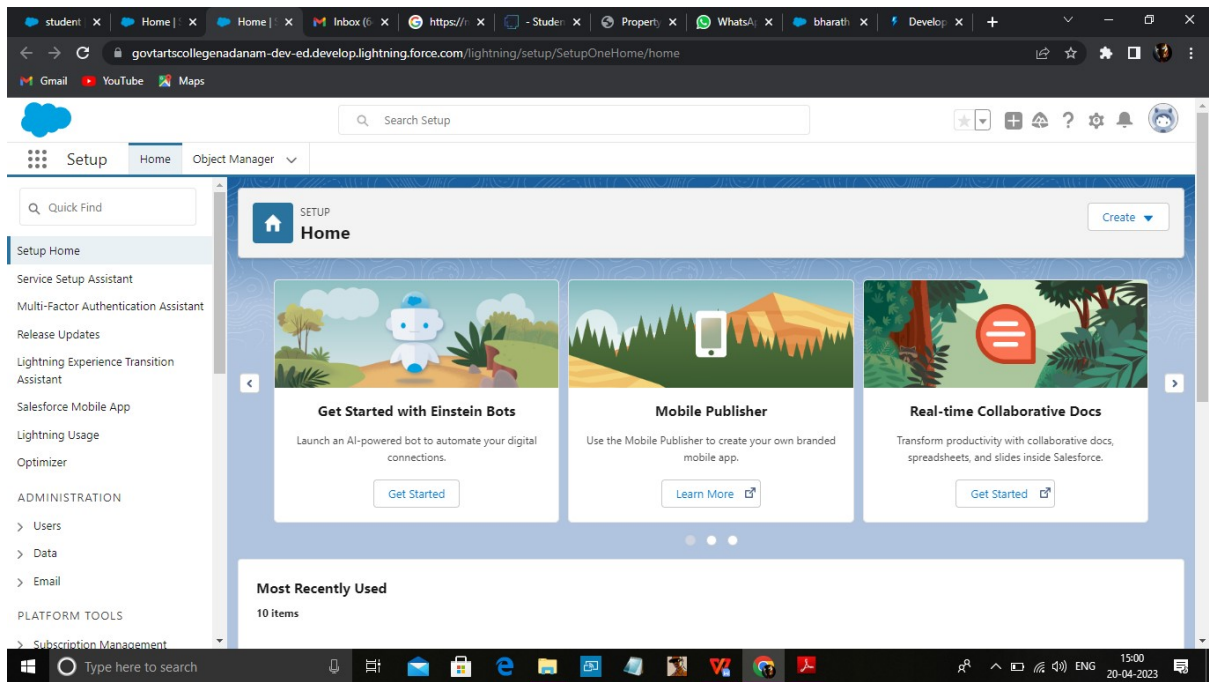
3. RESULT

3.1 Data Model:

| Object name | Fields in the Object | |
|-------------|----------------------|-------------|
| Lead | Field label | Data type |
| | lead | Auto number |
| | phone | phone |
| | | |
| loan | Field label | Data type |
| | state | picklist |
| | email | email |
| | | |

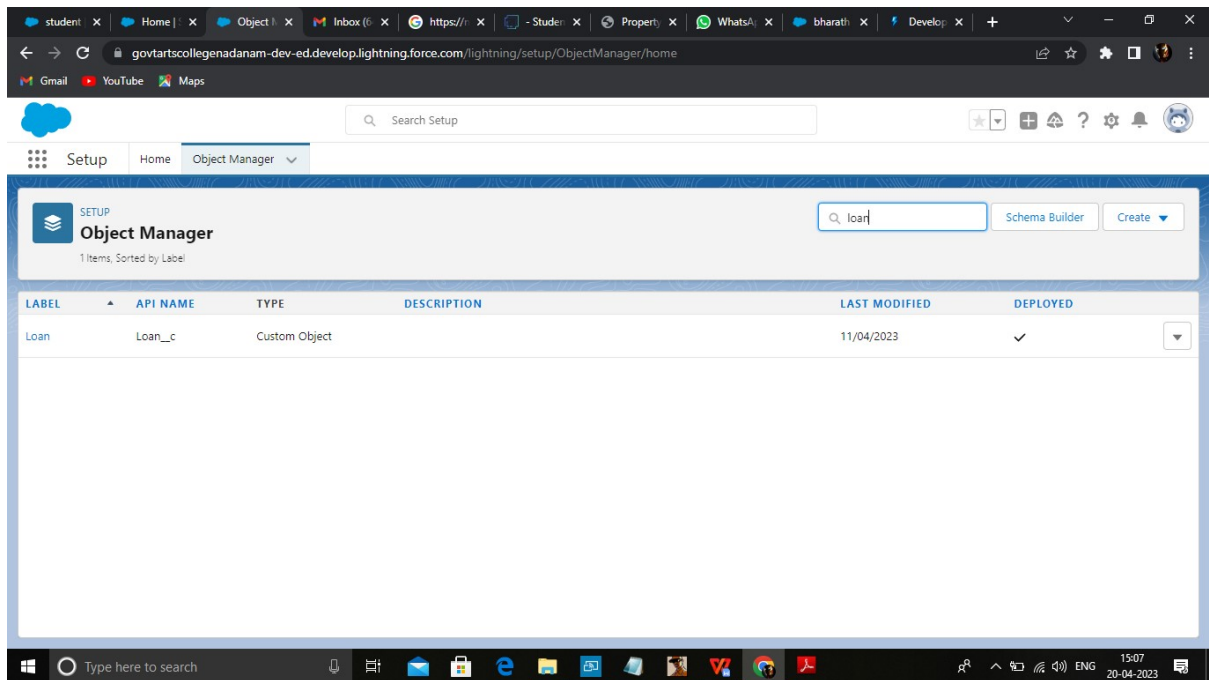
3.2 Activity and Screenshot

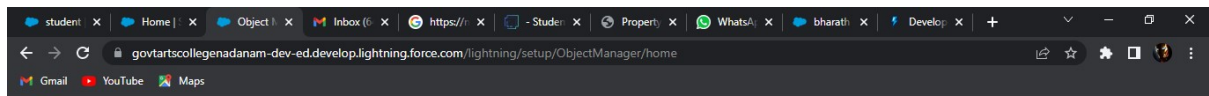
Milestone 1



Milestone

2

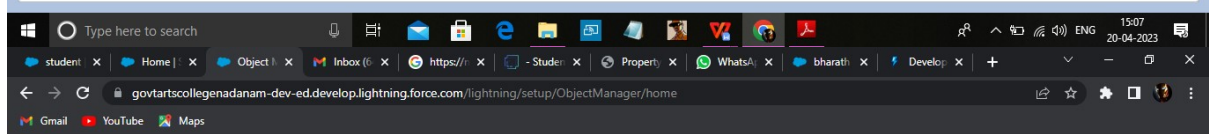




Object Manager

1 Items, Sorted by Label

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-------|----------|---------------|-------------|---------------|----------|
| rent | rent_c | Custom Object | | 11/04/2023 | ✓ |

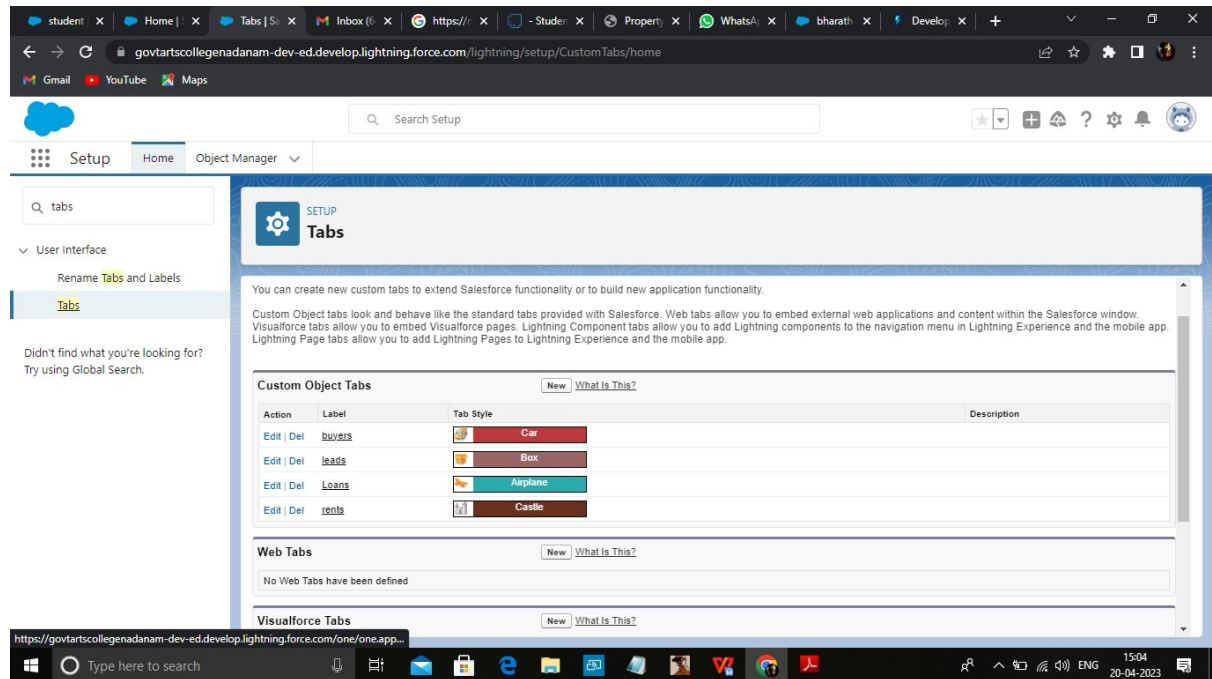


Object Manager

1 Items, Sorted by Label

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-------|----------|---------------|-------------|---------------|----------|
| rent | rent_c | Custom Object | | 11/04/2023 | ✓ |

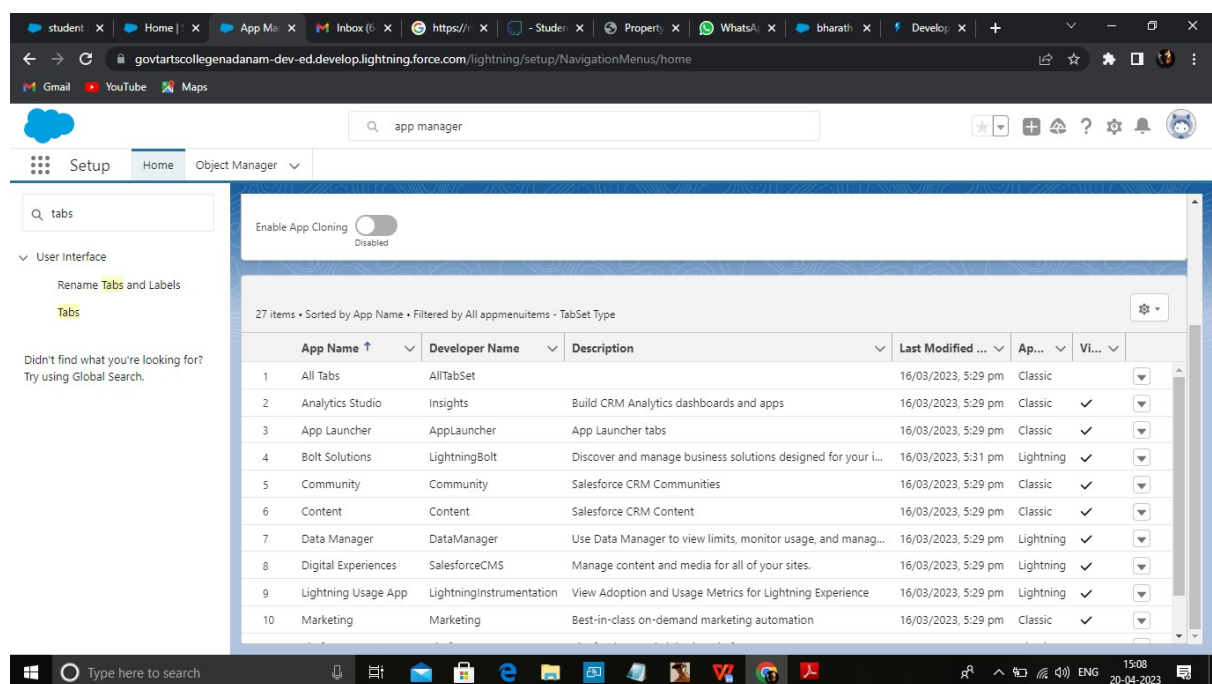
Milestone3



The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar has a search bar with "tabs" entered and a list of navigation items including "User Interface" and "Rename Tabs and Labels". The main content area is titled "SETUP Tabs" and includes a search bar. Below the title, there is a section for "Custom Object Tabs" with a table listing tabs for "Car", "Box", "Airplane", and "Castle". Each row has "Edit" and "Del" links. Below this is a section for "Web Tabs" with a message "No Web Tabs have been defined". At the bottom is a section for "Visualforce Tabs".

| Action | Label | Tab Style | Description |
|--|---------|-----------|-------------|
| Edit Del | buyside | Car | |
| Edit Del | leads | Box | |
| Edit Del | Loans | Airplane | |
| Edit Del | rents | Castle | |

Milestone 5



The screenshot shows the Salesforce Setup interface for Navigation Menus. The left sidebar has a search bar with "tabs" entered and a list of navigation items including "User Interface" and "Rename Tabs and Labels". The main content area is titled "Navigation Menus" and includes a search bar. Below the title, there is a section for "Enable App Cloning" which is disabled. Below this is a table listing 27 items, sorted by App Name, filtered by All appmenutypes - TabSet Type. The table has columns for App Name, Developer Name, Description, Last Modified, App..., and Vi....

| | App Name ↑ | Developer Name | Description | Last Modified ... | App... | Vi... |
|----|---------------------|--------------------------|---|---------------------|-----------|-------|
| 1 | All Tabs | AllTabSet | | 16/03/2023, 5:29 pm | Classic | |
| 2 | Analytics Studio | Insights | Build CRM Analytics dashboards and apps | 16/03/2023, 5:29 pm | Classic | ✓ |
| 3 | App Launcher | AppLauncher | App Launcher tabs | 16/03/2023, 5:29 pm | Classic | ✓ |
| 4 | Bolt Solutions | LightningBolt | Discover and manage business solutions designed for your i... | 16/03/2023, 5:31 pm | Lightning | ✓ |
| 5 | Community | Community | Salesforce CRM Communities | 16/03/2023, 5:29 pm | Classic | ✓ |
| 6 | Content | Content | Salesforce CRM Content | 16/03/2023, 5:29 pm | Classic | ✓ |
| 7 | Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manag... | 16/03/2023, 5:29 pm | Lightning | ✓ |
| 8 | Digital Experiences | SalesforceCMS | Manage content and media for all of your sites. | 16/03/2023, 5:29 pm | Lightning | ✓ |
| 9 | Lightning Usage App | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience | 16/03/2023, 5:29 pm | Lightning | ✓ |
| 10 | Marketing | Marketing | Best-in-class on-demand marketing automation | 16/03/2023, 5:29 pm | Classic | ✓ |

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead – <https://trailblazer.me/id/bhara1211>

Team member 1 - <https://trailblazer.me/id/bhara1211>

Team member 2 - <https://trailblazer.me/id/bhara1211>

Team member 3 - <https://trailblazer.me/id/bhara1211>

5.

6. ADVANTAGES AND DISADVANTAGES

(List of advantages and disadvantages of the proposed solution)

Advantages:

The property management process will be more streamlined, saving property managers time and effort.

The application will reduce errors and ensure that all properties and tenants are properly managed.

Automated reminders and notifications will ensure that property managers are aware of upcoming lease renewals, maintenance activities, and other important tasks.

The application will allow property managers to better track and manage their properties, increasing their operational efficiency.

Disadvantages:

Implementing the system may require significant time and resources.

There may be a learning curve for property managers and other users.

The system may require ongoing maintenance and updates.

7. APPLICATIONS

(The areas where this solution can be applied)

Applications:

The application can be used by property management companies of all sizes to help manage their properties.

The system can be customized to fit the specific needs of the company, allowing for greater flexibility.

The application can also be used by individual property owners to manage their own properties.

Conclusion:

A property management application using Salesforce can greatly improve the efficiency and effectiveness of the property management process. With automated tasks and reminders, property managers can focus on the most important aspects of their job, such as maintaining tenant satisfaction and managing their properties effectively.

8. CONCLUSION

(Conclusion summarizing the entire work and findings)

Conclusion:

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9. FUTURE SCOPE

(Enhancements that can be made in the future)

The application can be expanded to include additional features, such as integration with accounting software, to create a complete property management system. Additionally, the system can be integrated with other real estate software to create a comprehensive real estate management system. This application can also be used to manage other types of properties such as commercial properties or warehouses