

# **Project Report Template**

## **1.INTRODUCTION:**

### **1.1 Overview:**

Develop an App for Property Management where Buyer can order his Requirements and get the Appropriate Details of the Property. According to his interest just provide him with some discounts up to what extent he can get the discount. Also Track Whether he is Interested in taking the loan available for so just calculate how much loan Amount user can get it. Provide the Security for two different profiles like for marketing and sales team. Then Finally Create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal.

### **1.2 Purpose:**

Salesforce is a powerful Customer Relationship Management (CRM) platform that can be used for a variety of purposes, including property management. Here are some of the ways that Salesforce can be beneficial for property management:

1. Manage tenant information: Salesforce can be used to store tenant information, including contact details, leasing agreements, rent payments, and maintenance requests. This information can be easily accessed and updated by property managers and landlords.
2. Marketing and advertising: Salesforce can be used to create targeted marketing campaigns to attract new tenants. This can include personalized emails, social media posts, and advertisements that reach potential renters who match specific criteria.
3. Maintenance management: Salesforce can be used to track maintenance requests, schedule repairs, and communicate with contractors and vendors. This can help property managers ensure that properties are well-maintained and tenants are satisfied.
4. Analytics and reporting: Salesforce can be used to track key performance indicators (KPIs) such as occupancy rates, rental income, and maintenance costs. This data can be used to make informed decisions about property management strategies and identify areas for improvement.

Overall, using Salesforce for property management can streamline operations, improve tenant satisfaction, and help property managers make data-driven decisions

## 2. PROBLEM DEFINITION AND DESIGN THINKING:

### 2.1 Empathy Map:

<p><b>A cluttered Salesforce interface with too many tabs and fields Lots of data entry and manual processes Multiple properties and units with different lease terms and tenant information Maintenance requests and work orders that need to be tracked and managed Regulations and compliance requirements that need to be adhered to.</b></p>	<p><b>Complaints from tenants about maintenance issues or other concerns Requests for updates on repairs and maintenance requests from tenants and property owners Feedback from property owners on the financial performance of their properties Notifications and alerts from Salesforce related to important deadlines or compliance requirements.</b></p>
<p><b>Taking notes and keeping detailed records of tenant interactions and maintenance requests Communicating with tenants and property owners regularly to ensure their needs are met Scheduling maintenance and repairs with vendors and contractors Reviewing financial reports and data to analyse the performance of their properties Inputting data into Salesforce and ensuring all fields are up to date By understanding the thoughts, feelings, and actions of Property Managers using Salesforce, we can design a better user experience and provide solutions to their pain points.</b></p>	

### 2.2 Ideation and Brainstorming map:

<p>1. Features:</p> <ul style="list-style-type: none"> <li>- Property listing and management</li> <li>- Tenant management</li> <li>- Lease tracking and renewals</li> <li>- Maintenance and repair management</li> <li>- Financial management and reporting</li> </ul>
<p>2. Integration:</p> <ul style="list-style-type: none"> <li>- Integration with third-party property listing websites</li> <li>- Integration with accounting software for financial management</li> <li>- Integration with communication platforms for tenant communication</li> </ul>
<p>3. Customization:</p> <ul style="list-style-type: none"> <li>- Customizable dashboard and reports</li> <li>- Customizable fields and workflows</li> <li>- Customizable permissions and roles for users</li> </ul>
<p>4. Automation:</p> <ul style="list-style-type: none"> <li>- Automated notifications for lease renewals, maintenance requests, and other important events</li> <li>- Automated workflows for lease approvals, maintenance requests, and financial transactions</li> </ul>
<p>5. Mobile access:</p>

<ul style="list-style-type: none"> <li>- Mobile app for property managers and tenants</li> <li>- Mobile access to important data and information</li> </ul>
<p>6. Analytics:</p> <ul style="list-style-type: none"> <li>- Reporting and analytics on property performance, tenant satisfaction, and financial health</li> <li>- Predictive analytics for lease renewals, maintenance requests, and other key events</li> </ul>
<p>7. Support:</p> <ul style="list-style-type: none"> <li>- Comprehensive customer support, including training and onboarding</li> <li>- Community forum for users to share tips and best practices</li> </ul>
<p>8. Security:</p> <ul style="list-style-type: none"> <li>- Robust security measures to protect sensitive data and information</li> <li>- Regular updates and maintenance to ensure the latest security standards are met</li> </ul>
<p>9. Scalability:</p> <ul style="list-style-type: none"> <li>- Ability to scale the application to manage multiple properties and tenants</li> <li>- Integration with other Salesforce products for additional functionality and scalability.</li> </ul>

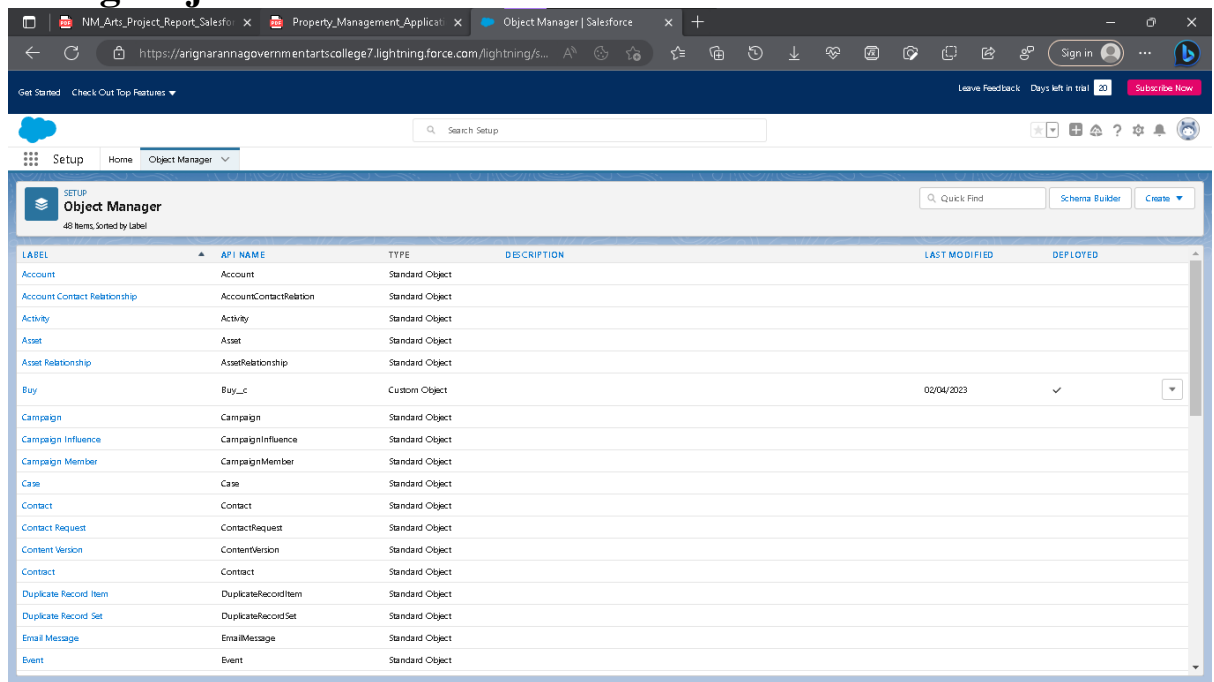
### 3. RESULT:

#### 3.1 Data Model:

Object name	Fields in the Object	
Buy	Field label	Data type
	Property Type	Picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
Rent	Field Type	Data Type
	Rent	Auto Number
	Rental City	Text
	BHK Type	Picklist
Loan	Field Type	Data type
	Loan Id	Auto Number
	Interest Rate	Currency
	Term	Number
	Annual Loan	Number
	Total Loan Instalments	Number
	Loan Amount	Formula
	Loan Repayment	Number

## Activity & Screenshot:

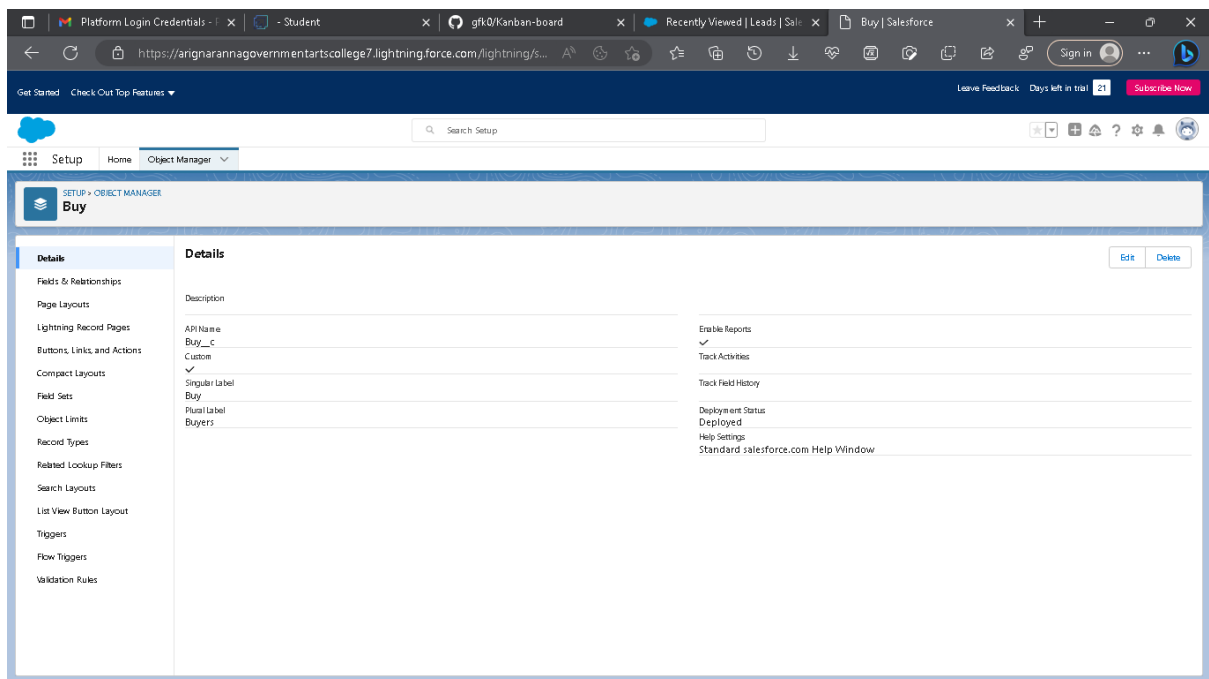
### Creating Objects:



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area displays a table of objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various standard objects like Account, Activity, Asset, and Campaign, as well as a custom object named 'Buy'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Account Contact Relationship	AccountContactRelation	Standard Object			
Activity	Activity	Standard Object			
Asset	Asset	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Buy	Buy__c	Custom Object		02/04/2023	✓
Campaign	Campaign	Standard Object			
Campaign Influence	CampaignInfluence	Standard Object			
Campaign Member	CampaignMember	Standard Object			
Case	Case	Standard Object			
Contact	Contact	Standard Object			
Contact Request	ContactRequest	Standard Object			
Content Version	ContentVersion	Standard Object			
Contact	Contact	Standard Object			
Duplicate Record Item	DuplicateRecordItem	Standard Object			
Duplicate Record Set	DuplicateRecordSet	Standard Object			
Email Message	EmailMessage	Standard Object			
Event	Event	Standard Object			

### Creating Buy Object:



The screenshot shows the Salesforce Object Manager configuration page for the 'Buy' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'Details' and contains several configuration fields.

Field	Value
Description	
API Name	Buy__c
Custom	✓
Singular Label	Buy
Plural Label	Buyers
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

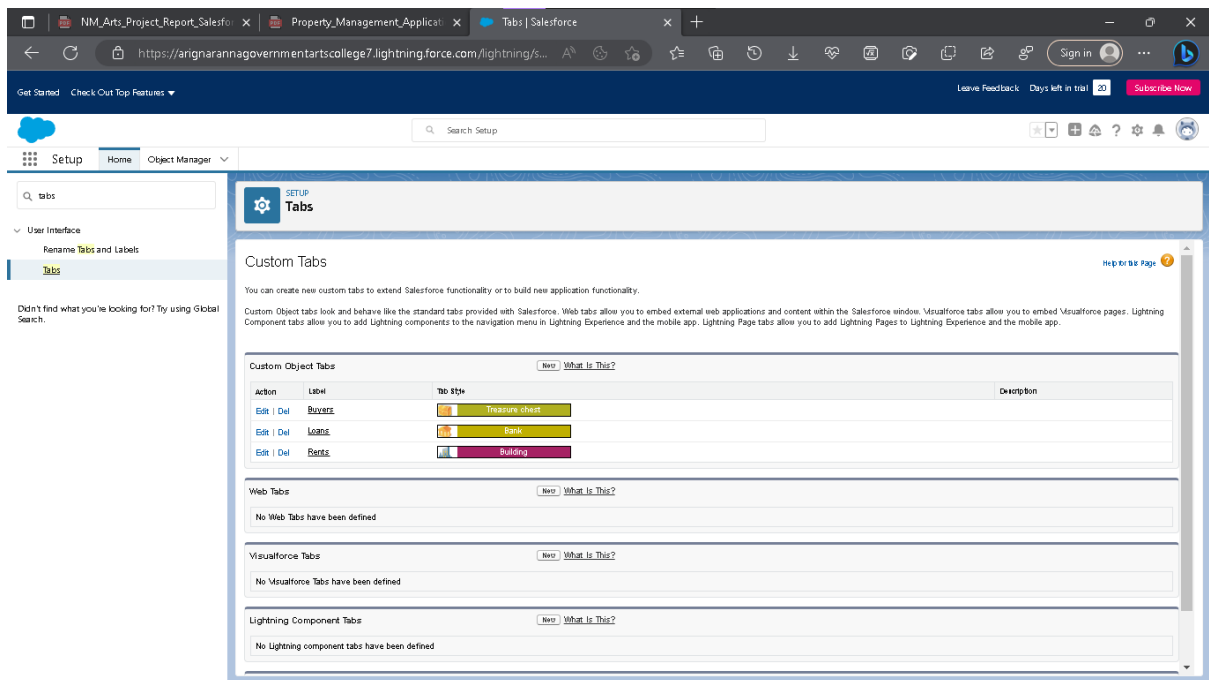
## Creating Loan Object:

The screenshot shows the Salesforce Setup interface for the 'Loan' object. The browser tabs include 'Platform Login Credentials', 'Student', 'gfk0/Kanban-board', 'Recently Viewed | Leads | Sal...', and 'Loan | Salesforce'. The URL is 'https://arignarannagovernmentartscollege7.lightning.force.com/lightning/s...'. The page header shows 'Get Started', 'Check Out Top Features', 'Leave Feedback', 'Days left in trial: 21', and a 'Subscribe Now' button. The left sidebar has 'Setup' and 'Home' tabs, with 'Object Manager' selected. The main content area is titled 'Loan' and shows the 'Details' section. The left sidebar lists various configuration options: 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, List View Button Layout, Triggers, Flow Triggers, and Validation Rules. The 'Details' section on the right includes fields for API Name (Loan\_\_C), Custom (checked), Singular Label (Loan), and Plural Label (Loans). It also has checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). The 'Deployment Status' is 'Deployed', and the 'Help Settings' are set to 'Standard salesforce.com Help Window'. There are 'Edit' and 'Delete' buttons at the top right of the details section.

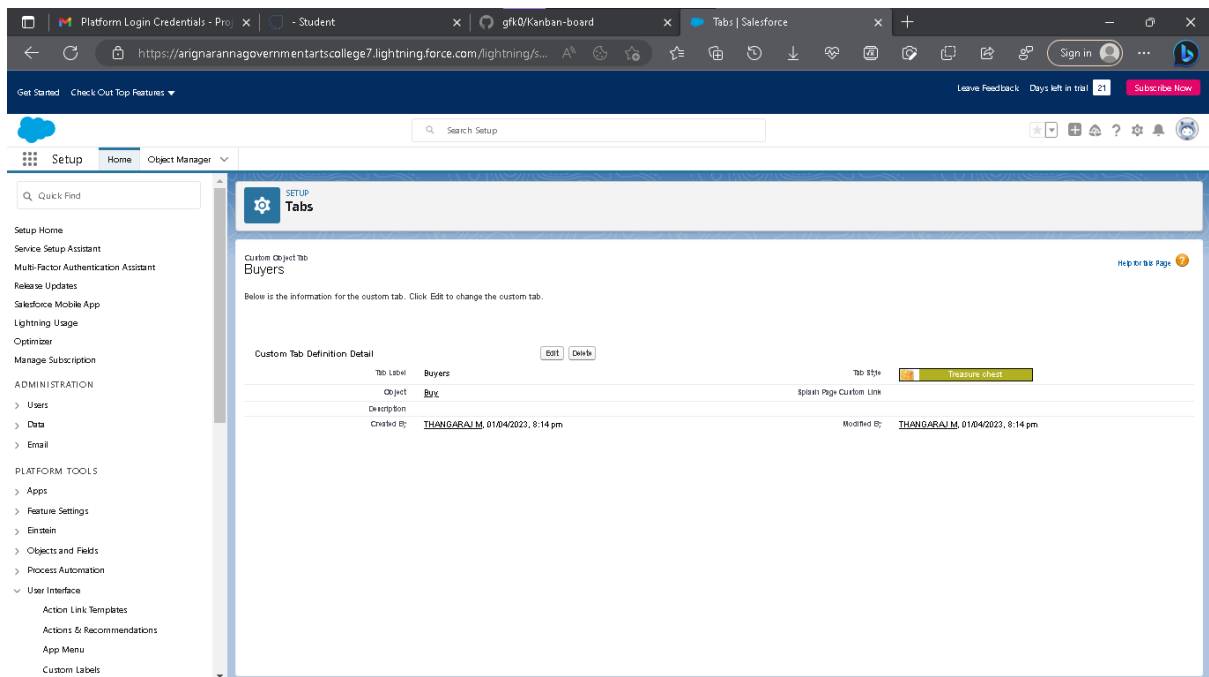
## Creating Rent Object:

The screenshot shows the Salesforce Setup interface for the 'Rent' object. The browser tabs include 'Platform Login Credentials', 'Student', 'gfk0/Kanban-board', 'Recently Viewed | Leads | Sal...', and 'Rent | Salesforce'. The URL is 'https://arignarannagovernmentartscollege7.lightning.force.com/lightning/s...'. The page header shows 'Get Started', 'Check Out Top Features', 'Leave Feedback', 'Days left in trial: 21', and a 'Subscribe Now' button. The left sidebar has 'Setup' and 'Home' tabs, with 'Object Manager' selected. The main content area is titled 'Rent' and shows the 'Details' section. The left sidebar lists various configuration options: 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, List View Button Layout, Triggers, Flow Triggers, and Validation Rules. The 'Details' section on the right includes fields for API Name (Rent\_\_C), Custom (checked), Singular Label (Rent), and Plural Label (Rents). It also has checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). The 'Deployment Status' is 'Deployed', and the 'Help Settings' are set to 'Standard salesforce.com Help Window'. There are 'Edit' and 'Delete' buttons at the top right of the details section.

# Creating Tabs:



# Creating Buyers Tab:



# Creating Rent Tab:

The screenshot shows the Salesforce Setup interface for creating a custom tab. The left sidebar contains navigation options like 'Setup Home', 'Service Setup Assistant', and 'Administration'. The main content area is titled 'Custom Object Tab: Rents'. Below this, there is a 'Custom Tab Definition Detail' table with the following information:

Tab Label	Object	Tab Style
Rents	Rent	Building

The table also includes a 'Description' field and a 'Created By' field (THANGARAJ M, 02/04/2023, 10:33 am). There are 'Edit' and 'Delete' buttons next to the table header.

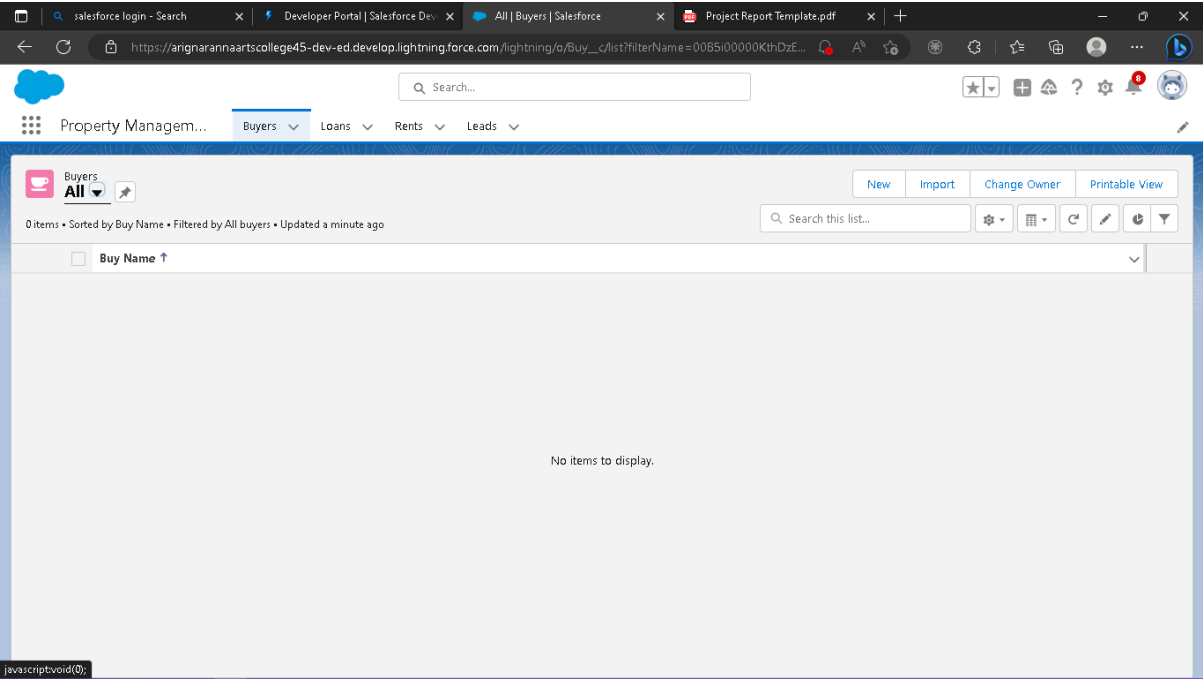
# Creating Loan Tab:

The screenshot shows the Salesforce Setup interface for creating a custom tab. The left sidebar contains navigation options like 'Setup Home', 'Service Setup Assistant', and 'Administration'. The main content area is titled 'Custom Object Tab: Loans'. Below this, there is a 'Custom Tab Definition Detail' table with the following information:

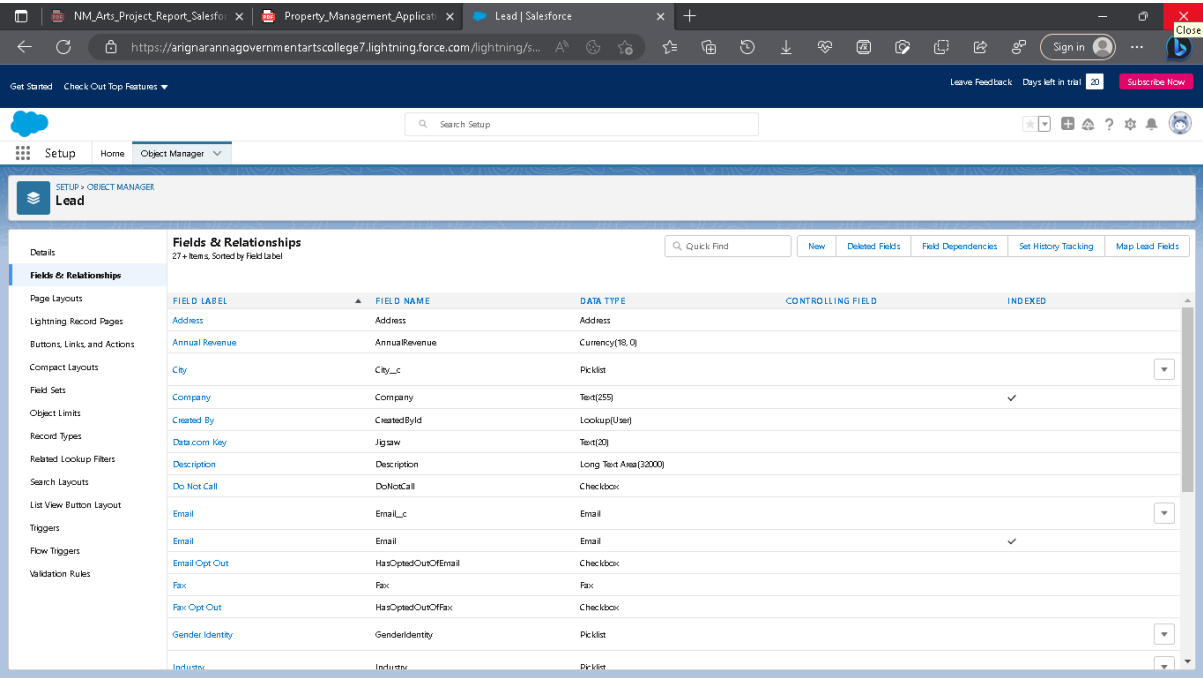
Tab Label	Object	Tab Style
Loans	Loan	Fan

The table also includes a 'Description' field and a 'Created By' field (Divyasharathi K, 12/04/2023, 11:20 am). There are 'Edit' and 'Delete' buttons next to the table header.

# Creating Lightning App:



# Creating Lead Field:





# Create Buy Field:

Buy

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

List View Button Layout

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy Name	Name	Text(80)		✓
City	City__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Property Type	Property_Type__c	Picklist		
State	State__c	Picklist		

# Create Rent Field:

Setup

Home

Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

Setup

Tabs

Custom Object Tab

Rents

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

Custom Tab Definition Detail

Edit

Delete

Tab Label	Rents	Tab Style	Books
Object	Rent	Splash Page Custom Link	
Description			
Created By	Divyasharath K, 12/04/2023, 11:17 am	Modified By	Divyasharath K, 12/04/2023, 11:17 am

# Create Loan Field:

Get Started

Check Out Top Features

Leave Feedback

Days left in trial: 20

Subscribe Now

Setup

Home

Object Manager

Search Setup

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

List View Button Layout

Triggers

Flow Triggers

Validation Rules

11 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	AnnualLoan_c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Interest Rate	InterestRate_c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	LoanAmount_c	Formula (Currency)		
Loan Id	LoanId_c	Auto Number		
Loan Name	Name	Text(80)		✓
Loan Repayment	LoanRepayment_c	Number(18, 0)		
Owner	OwnerId	Lookup(User/Group)		✓
Term	Term_c	Number(18, 0)		
Total Loan Installments	TotalLoanInstallments_c	Number(18, 0)		

# Creating Profile:

Get Started

Check Out Top Features

Leave Feedback

Days left in trial: 20

Subscribe Now

Setup

Home

Object Manager

Search Setup

Profiles

profile

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

User Profiles

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Profile

NEW

Action	Name	User License	Custom
Edit	Chatter External User	Chatter External	<input type="checkbox"/>
Edit	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit	Contract Manager	Salesforce	<input type="checkbox"/>
Edit	CPO Integration User	CPO Integration User	<input type="checkbox"/>
Edit   Del	End User	Salesforce	<input checked="" type="checkbox"/>
Edit	Identity User	Identity	<input type="checkbox"/>
Edit   Del	Marketing Manager	Salesforce	<input checked="" type="checkbox"/>
Edit	Marketing User	Salesforce	<input type="checkbox"/>
Edit	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
Edit   Del	Sales Manager	Salesforce	<input checked="" type="checkbox"/>
Edit	Solution Manager	Salesforce	<input type="checkbox"/>
Edit	Standard User	Salesforce	<input type="checkbox"/>
Edit	System Administrator	Salesforce	<input type="checkbox"/>

# Create Sales Manager Profile:

The screenshot shows the Salesforce Setup interface for the 'Sales Manager' profile. The left sidebar contains a search bar with 'profile' and a list of users. The main content area is titled 'Sales Manager' and includes a description, a list of enabled permissions, and a table of page layouts.

**Profile Detail**

Name	Sales Manager
User License	Salesforce
Description	
Created By	Dhivabharathi K, 12/04/2023, 12:58 pm
Modified By	Dhivabharathi K, 13/04/2023, 9:28 am

**Page Layouts**

Standard Object Layouts	Global	Object Milestone
	Global Layout [View Assignment]	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product Layout [View Assignment]

# Creating Marketing Manager:

The screenshot shows the Salesforce Setup interface for the 'Marketing Manager' profile. The left sidebar contains a search bar with 'profile' and a list of users. The main content area is titled 'Marketing Manager' and includes a description, a list of enabled permissions, and a table of page layouts.

**Profile Detail**

Name	Marketing Manager
User License	Silver Partner
Description	
Created By	Dhivabharathi K, 12/04/2023, 1:12 pm
Modified By	Dhivabharathi K, 13/04/2023, 9:28 am

**Page Layouts**

Standard Object Layouts	Global	Payment
	Global Layout [View Assignment]	Payment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Payment Authorization [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Payment Authorization Adjustment [View Assignment]
Account	Account Layout [View Assignment]	Payment Gateway Layout [View Assignment]

# Creating Users:

The screenshot shows the Salesforce 'All Users' page in the Setup menu. The left sidebar contains navigation options like 'Setup', 'Home', 'Object Manager', and 'Users'. 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 status, and Profile. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

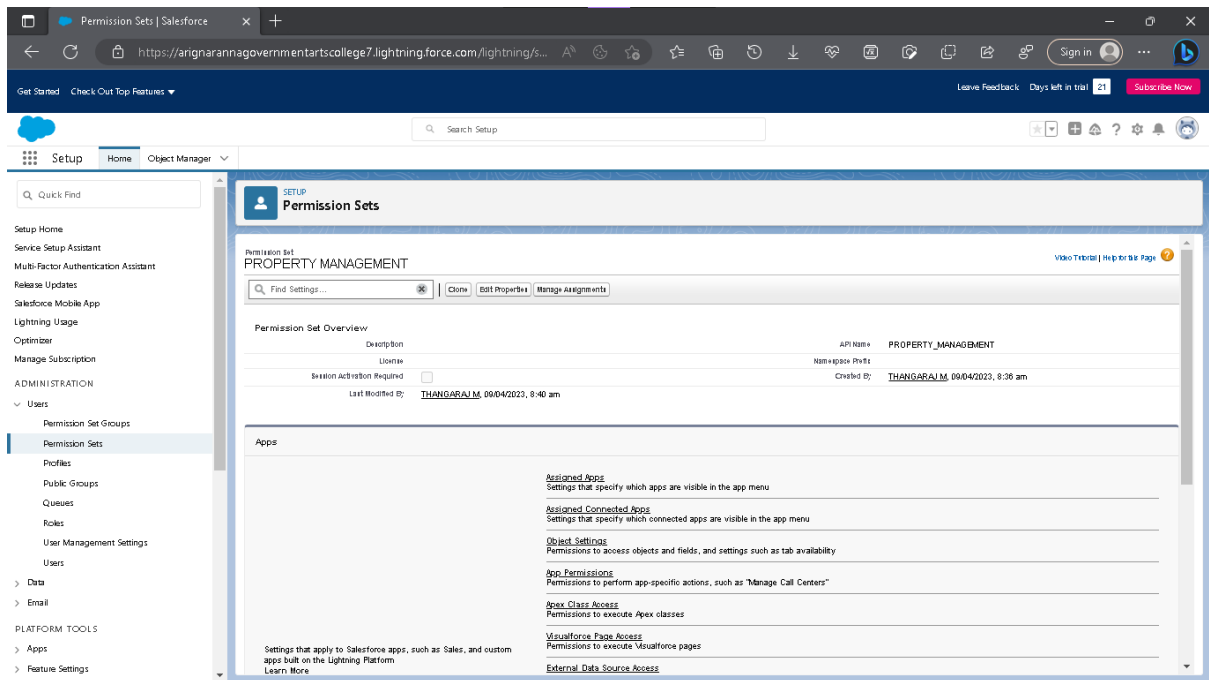
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A. MUTHARASU	ma	mutharasu1810@gmail.com	Marketing Executive 1	✓	Standard Platform User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.005000000ps@head.1odvkhnyv4@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	G. LOGESHWAR	la	logeshkaneah309@gmail.com	Marketing Executive 2	✓	Force.com - Free User
<input type="checkbox"/> Edit	J. YUVARAJ	yi	yuvathiraja344@gmail.com	Sales rep 1	✓	Standard Platform User
<input type="checkbox"/> Edit	K. Divyabharathi	DBhar	divyabharathi@college.sandbox		✓	System Administrator
<input type="checkbox"/> Edit	M. GAVATHIRI	gm	suminaga19@gmail.com	Sales rep 2	✓	Standard Platform User
<input type="checkbox"/> Edit	B. NIRAJITHI	nr	nirajithi458@gmail.com	Sales rep 3	✓	Sales Manager
<input type="checkbox"/> Edit	User Integration	integ	integration@005000000ps@head.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@005000000ps@head.com		✓	Analytics Cloud Security User

# Creating Permission Sets:

The screenshot shows the Salesforce 'Permission Sets' page in the Setup menu. The left sidebar contains navigation options like 'Setup', 'Home', 'Object Manager', and 'Permission Sets'. The main content area is titled 'Permission Sets' and includes a 'Property Management' section. Below this is a 'Permission Set Overview' table with columns for Description, License, Session Activation Required, API Name, Namespace Prefix, and Created By. The table shows a single permission set named 'Property\_Management' created by 'Divyabharathi K.' on 13/04/2023, 10:32 am. Below the table is an 'Apps' section with links to 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'Apex Class Access'.

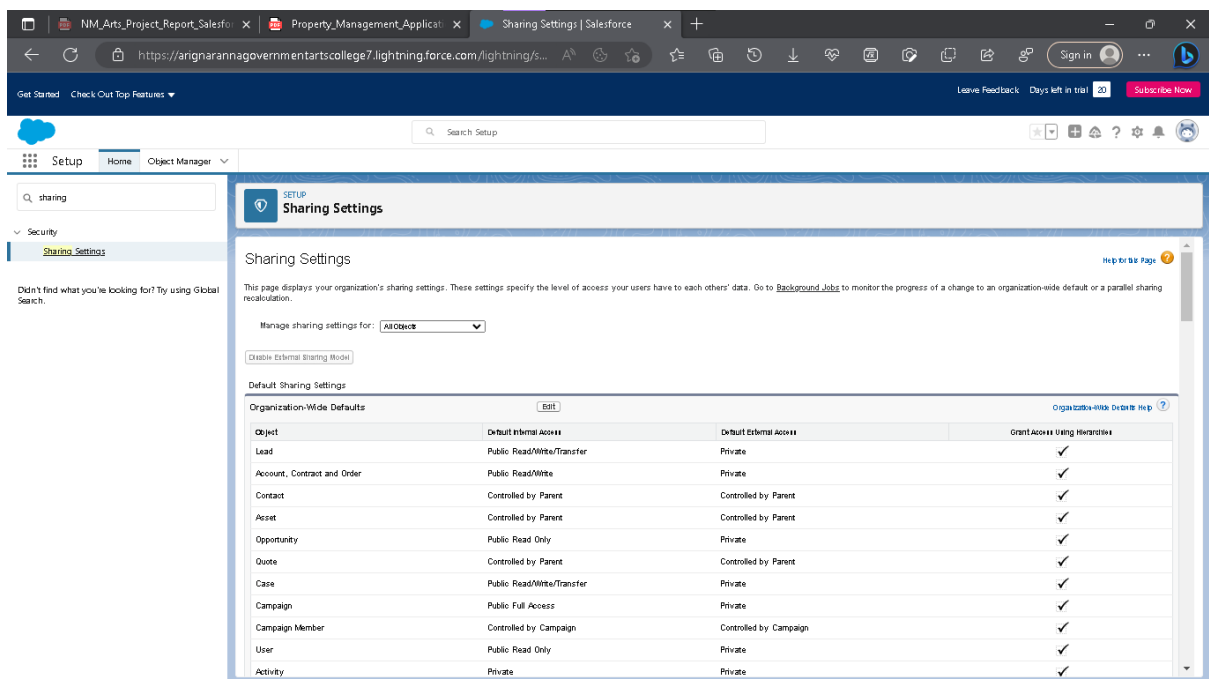
Description	License	Session Activation Required	API Name	Namespace Prefix	Created By
		<input type="checkbox"/>	Property_Management		Divyabharathi K. 13/04/2023, 10:32 am

## Creating Permission Set for Sales Rep 3:



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Manage Subscription, ADMINISTRATION (Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings), Data, Email, PLATFORM TOOLS (Apps, Feature Settings), and a search bar. The main content area is titled 'Permission Sets' and includes a 'PROPERTY MANAGEMENT' header. Below this, there's a 'Find Settings...' search bar and tabs for 'Clone', 'Edit Properties', and 'Manage Assignments'. The 'Permission Set Overview' section displays details for the 'PROPERTY\_MANAGEMENT' set, including its description, license, session activation requirement, and creation/modification dates by 'THANGARAJ.M'. The 'Apps' section lists various permissions: 'Assigned Apps' (visibility in app menu), 'Assigned Connected Apps' (visibility in app menu), 'Object Settings' (access to objects and fields), 'App Permissions' (app-specific actions), 'Apex Class Access' (execute Apex classes), 'Visualforce Page Access' (execute Visualforce pages), and 'External Data Source Access'.

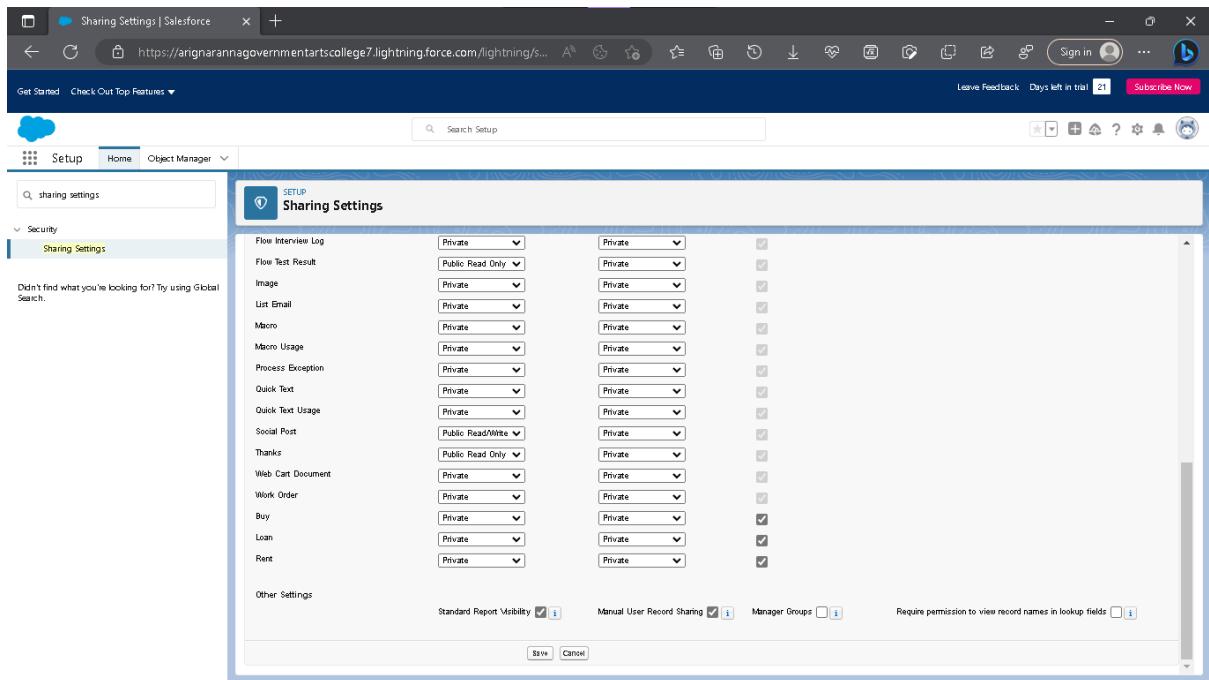
## Creating OWD Settings:



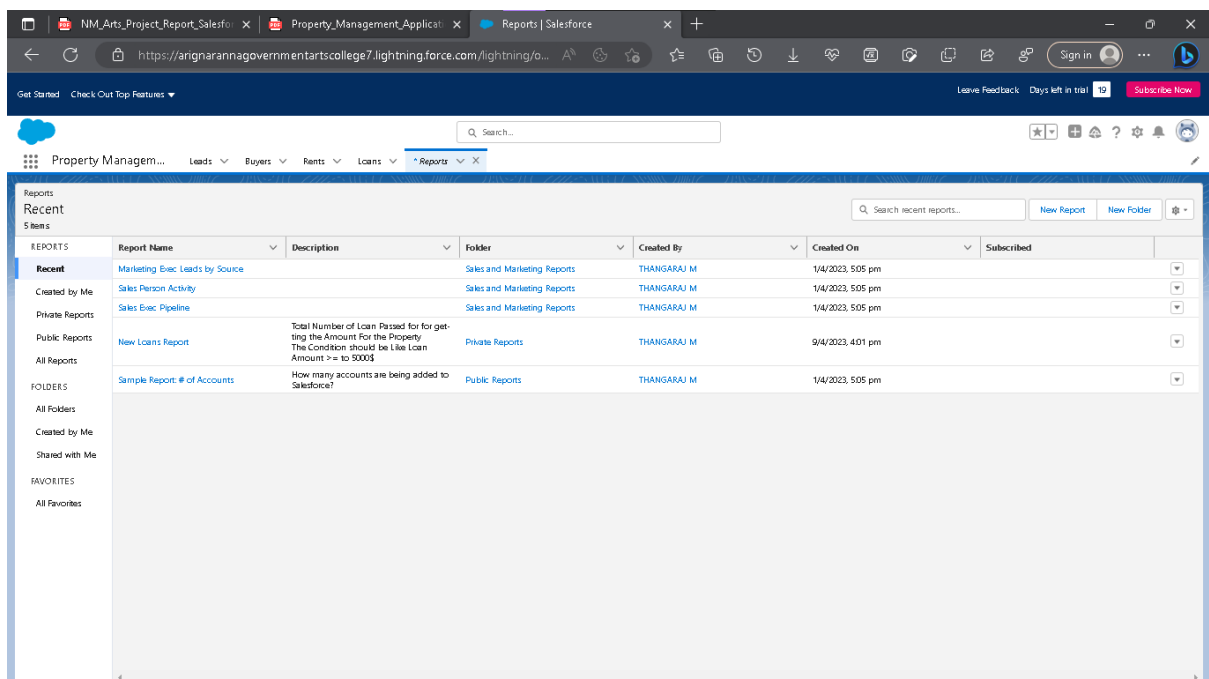
The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' section. The left sidebar includes navigation links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Manage Subscription, ADMINISTRATION (Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings), Data, Email, PLATFORM TOOLS (Apps, Feature Settings), and a search bar. The main content area is titled 'Sharing Settings' and includes a 'Help for this Page' link. Below the header, there's a 'Manage sharing settings for:' dropdown set to 'All Objects' and a 'Disable External Sharing Mode' button. The 'Default Sharing Settings' section features a table for 'Organization-Wide Defaults' with columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The table lists various objects and their corresponding access levels.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account, Contract and Order	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Account	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read Only	Private	✓
Quote	Controlled by Parent	Controlled by Parent	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

# Creating OWD for Lead and Rent:



# Creating Report:



# Create Report for New Loans:

The screenshot shows the Salesforce Report Builder interface. The browser tabs include 'NM\_Arts\_Project\_Report\_Salesfo...', 'Property\_Management\_Applicat...', and 'Report Builder | Salesforce'. The URL is 'https://arignarannagovernmentartscollege7.lightning.force.com/lightning/r/...'. The page header shows 'Get Started', 'Check Out Top Features', 'Leave Feedback', 'Days left in trial 19', and 'Subscribe Now'. The main navigation bar includes 'Property Managem...', 'Leads', 'Buyers', 'Rents', 'Loans', and 'Report Builder'. The left sidebar shows 'Outline' with 'Groups' and 'Columns' sections. The 'Columns' section has 'Loan Loan Name' selected. The main area shows 'Loan: Loan Name' and a message: 'No records returned. Try editing report filters: • Show All loans. • Edit other filters in the filter panel.' The right sidebar has buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'.

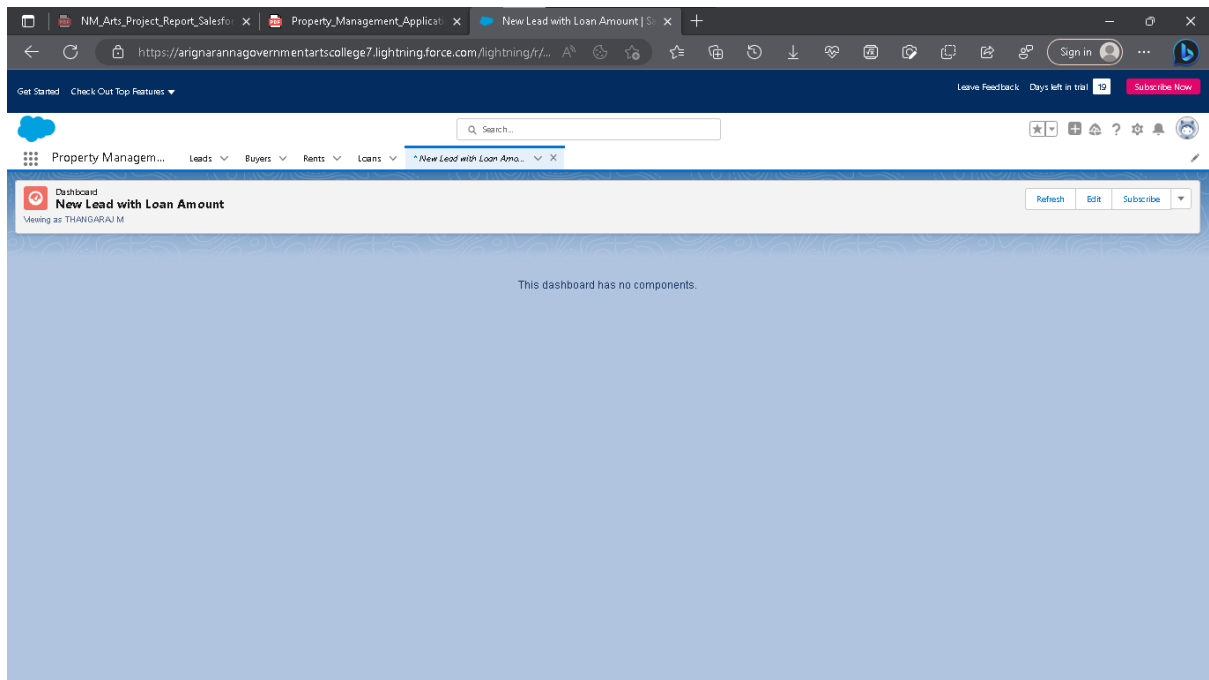
# Creating Dashboard:

The screenshot shows the Salesforce Dashboards interface. The browser tabs include 'NM\_Arts\_Project\_Report\_Salesfo...', 'Property\_Management\_Applicat...', and 'Dashboards | Salesforce'. The URL is 'https://arignarannagovernmentartscollege7.lightning.force.com/lightning/d...'. The page header shows 'Get Started', 'Check Out Top Features', 'Leave Feedback', 'Days left in trial 19', and 'Subscribe Now'. The main navigation bar includes 'Property Managem...', 'Leads', 'Buyers', 'Rents', 'Loans', and 'Dashboards'. The left sidebar shows 'Dashboards' with 'Recent' and '2 items'. The main area shows a table of recent dashboards:

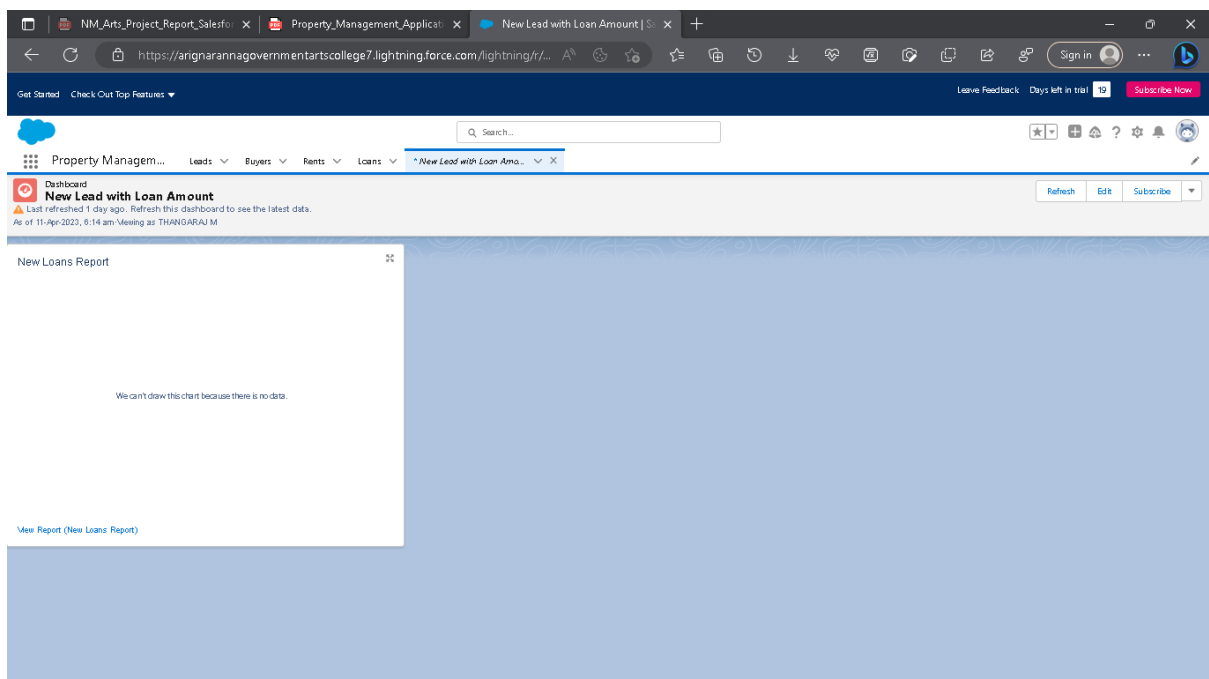
DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Lead with Loan Amount		Private Dashboards	THANGARAJ M	9/4/2023, 4:04 pm	
Created by Me	New Lead with Loan Amount		Private Dashboards	THANGARAJ M	9/4/2023, 4:07 pm	

The right sidebar has buttons for 'New Dashboard' and 'New Folder'.

# Creating Dashboard 1:



# Creating Dashboard 2:





### **3 Trailhead Profile Public URL:**

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

Team Member 1 – <https://trailblazer.me/id/nmathi16>

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

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

### **Advantages:**

1. **Streamlined Operations:** Salesforce can help property managers streamline their operations and improve efficiency. With all tenant and property data stored in one place, property managers can quickly access and update information, communicate with tenants and contractors, and track maintenance requests and repairs.
2. **Improved Tenant Satisfaction:** By using Salesforce, property managers can improve communication with tenants and address maintenance issues quickly. This can help improve tenant satisfaction, resulting in higher tenant retention rates and positive word-of-mouth referrals.
3. **Data-Driven Decision Making:** Salesforce provides property managers with real-time data and analytics, allowing them to make informed decisions about property management strategies, marketing campaigns, and tenant retention efforts.
4. **Customizable:** Salesforce is highly customizable, allowing property managers to tailor it to their specific needs. This can include creating custom dashboards, reports, and workflows.

### **Disadvantages:**

1. **Cost:** Salesforce can be expensive, particularly for smaller property management companies. The platform requires a subscription, and additional fees may apply for features such as custom development, data storage, and integrations.
2. **Complexity:** Salesforce can be complex and may require specialized training for property managers to use it effectively. Additionally, the platform requires ongoing maintenance and updates.

3. Integration: Integrating Salesforce with other property management software may be challenging, particularly if the software is not compatible with Salesforce.

4. Security: As with any cloud-based software, there is a risk of data breaches and other security issues. Property managers should take appropriate security measures to protect sensitive tenant and property data.

## **APPLICATIONS:**

Here are some examples of how Salesforce can be used for property management:

1. Tenant management: Salesforce can be used to store and manage tenant information, including contact details, leasing agreements, payment history, and maintenance requests. This information can be accessed by property managers to ensure that tenants are satisfied and that rent payments are up to date.

2. Marketing and advertising: Salesforce can be used to create targeted marketing campaigns to attract new tenants. Property managers can use Salesforce to create personalized emails, social media posts, and advertisements that reach potential renters who match specific criteria.

3. Maintenance management: Salesforce can be used to track maintenance requests, schedule repairs, and communicate with contractors and vendors. This can help property managers ensure that properties are well-maintained and tenants are satisfied.

4. Reporting and analytics: Salesforce can be used to track KPIs such as occupancy rates, rental income, and maintenance costs. This data can be used to make informed decisions about property management strategies and identify areas for improvement.

5. Lease management: Salesforce can be used to manage leasing agreements, including the creation and signing of leases, renewals, and terminations. This can help property managers ensure that all necessary documentation is in order and that leases are managed efficiently.

6. Communication: Salesforce can be used to communicate with tenants, contractors, and vendors through various channels such as email, chat, or phone. This can help property managers stay organized and keep all communication in one centralized location.

## **Future Scope:**

Overall, Salesforce can help streamline operations, improve tenant satisfaction, and increase efficiency in property management.

The future scope for property management using Salesforce is promising, as the platform continues to evolve and offer new features and capabilities. Here are some potential developments in the future:

1. **Artificial Intelligence (AI):** Salesforce is already using AI to improve its platform, and this technology could be used in property management to automate tasks such as lease renewals, maintenance requests, and rent payments.
2. **Internet of Things (IoT):** As more properties become connected through the IoT, Salesforce could be used to collect and analyse data from smart devices such as thermostats, security cameras, and appliances, providing valuable insights into property usage and maintenance needs.
3. **Virtual and Augmented Reality (VR/AR):** VR and AR technology could be used to create immersive property tours and visualizations, helping potential tenants get a better sense of properties before they sign a lease.
4. **Predictive Analytics:** By using predictive analytics, property managers could forecast future trends such as occupancy rates and rental income, allowing them to make data-driven decisions about property management strategies.
5. **Mobile Capabilities:** As mobile usage continues to grow, Salesforce could expand its mobile capabilities, allowing property managers to access tenant and property data on the go.

Overall, Salesforce's continued development and evolution could lead to exciting new possibilities in the field of property management, helping property managers become more efficient, effective, and responsive to tenant needs.