

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

INTRODUCTION

1. Overview;

A property management application using Salesforce is a software system designed for property managers and real estate professionals to manage their properties and tenants more efficiently. The application provides a comprehensive solution for tasks such as lead tracking, tenant management, rent collection, maintenance and repair management, financials, and reporting. With Salesforce's robust features, property owners can easily streamline their operations and better engage with their tenants. The platform also offers built-in integrations with other essential tools such as email, accounting, and customer relationship management software, making it a cost-effective and all-in-one solution for property managers.

2. Purpose;

The use of this project.

A property management application using Salesforce can be used for various purposes such as:

1. Managing properties: The application can be used to manage properties, including details such as location, size, rent/lease details, maintenance schedules, and property history.
2. Tenant management: The application can help manage tenant accounts such as lease agreements, rent collection, maintenance requests, and communication with tenants.
3. Maintenance and repairs: The application can be used to manage maintenance and repair schedules, work orders, and service requests.
4. Financial and accounting management: The application can track rent payments, generate financial reports, and handle accounting tasks such as budgeting, billing, and payment processing.
5. Analyzing data: The application can provide valuable data insights, such as tenant demographics, occupancy rates, and revenue generation, which can help property managers make informed decisions regarding their properties.

In summary, a property management application using Salesforce can help streamline property management tasks, improve communication with tenants, and optimize financial and operational efficiency.

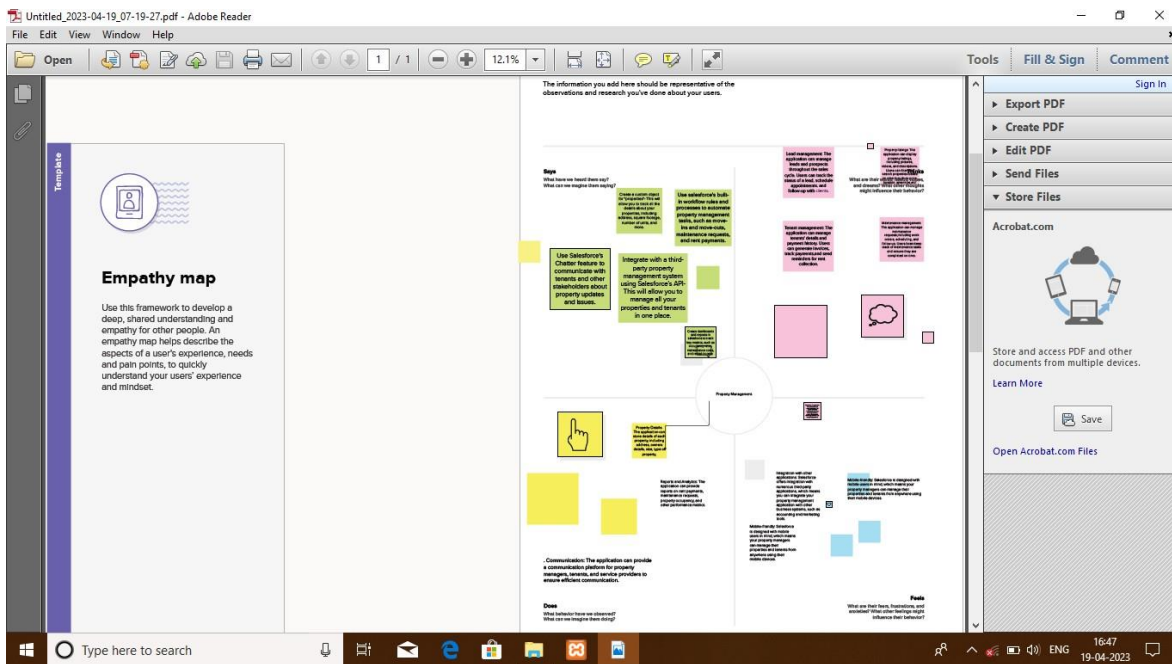
Purpose of the project;

The purpose of a property management application using

Salesforce is to streamline and centralize the management of properties and tenants, allowing property managers to effectively manage their operations and improve tenant experiences. With Salesforce, property managers can track lease agreements, rent payments, maintenance requests, and tenant communications all in one place. This improves overall productivity and provides real-time insights into property performance, enabling managers to make data-driven decisions to optimize operations and maximize profitability. Additionally, the application can automate lease renewals and other time-consuming administrative tasks, freeing up time to focus on other important aspects of managing the property. Overall, a property management application using Salesforce helps property managers deliver a better tenant experience, improve operational efficiency, and drive business growth.

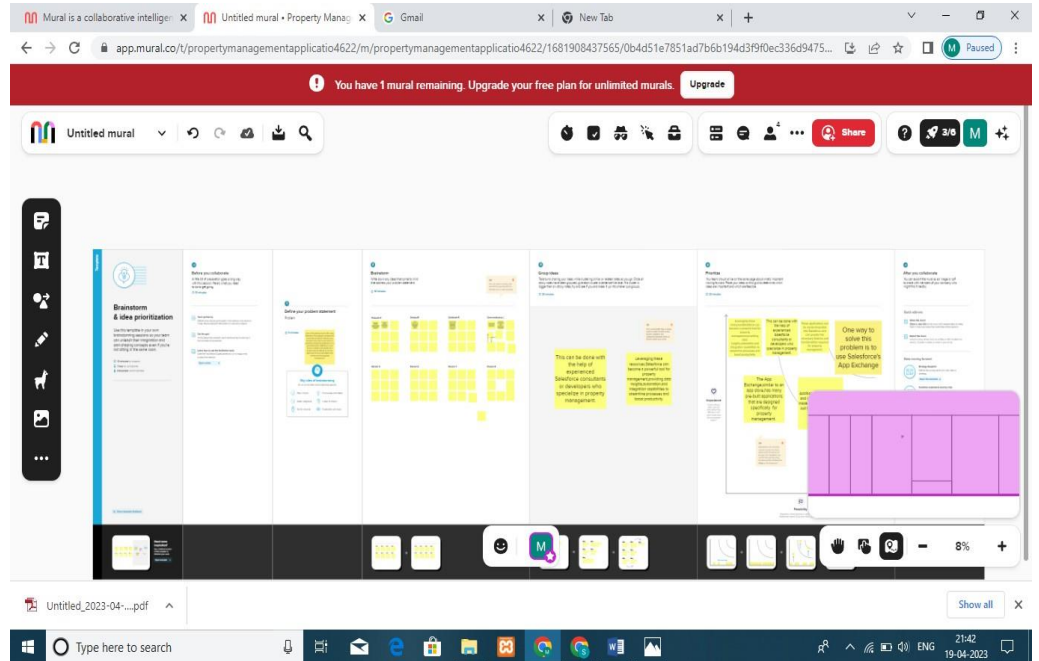
1 Problem Definition & Design Thinking

1. Empathy Map



2. Ideation & Brainstorming Map

Project Report Template

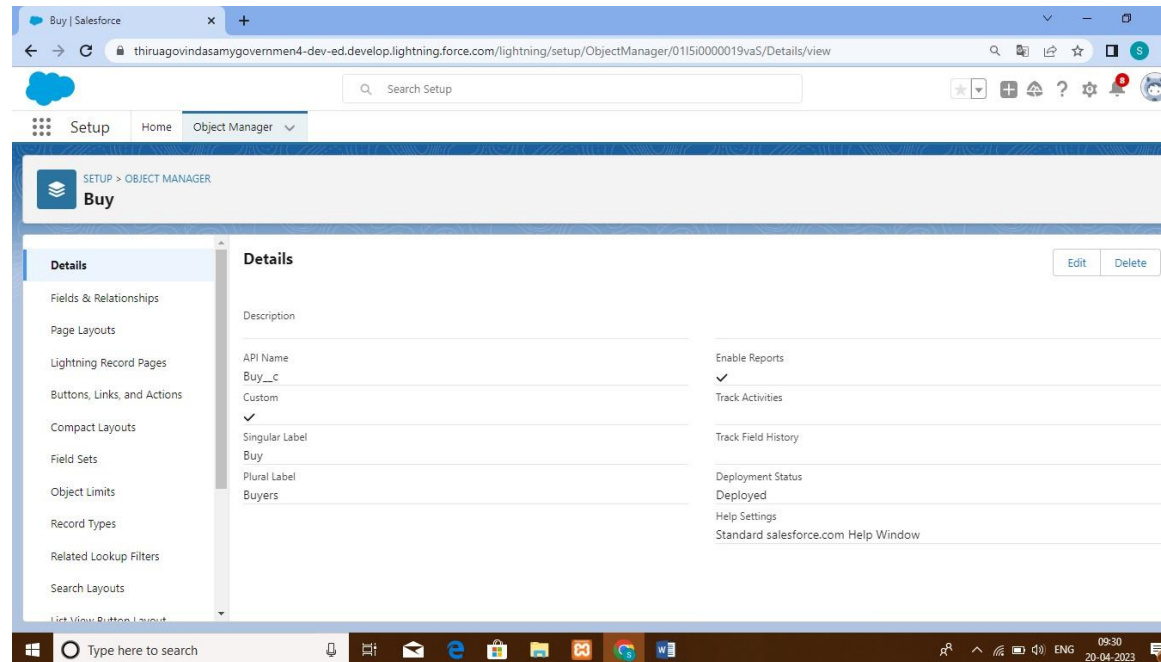


2

RESULT

Custom Object;

1.



2.

Project Report Template

Buy | Salesforce

thiruagovindasamygovermen4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i0000019va5/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Buy

Details

Fields & Relationships

5 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	Buy__c	Picklist (Multi-Select)		
Buy Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

https://thiruagovindasamygovermen4-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0115i0000019va5/FieldsAndRelationships/view

Type here to search

ENG 09:30 20-04-2023

3.

Loan | Salesforce

thiruagovindasamygovermen4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i0000019vac/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Loan

Details

Edit Delete

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

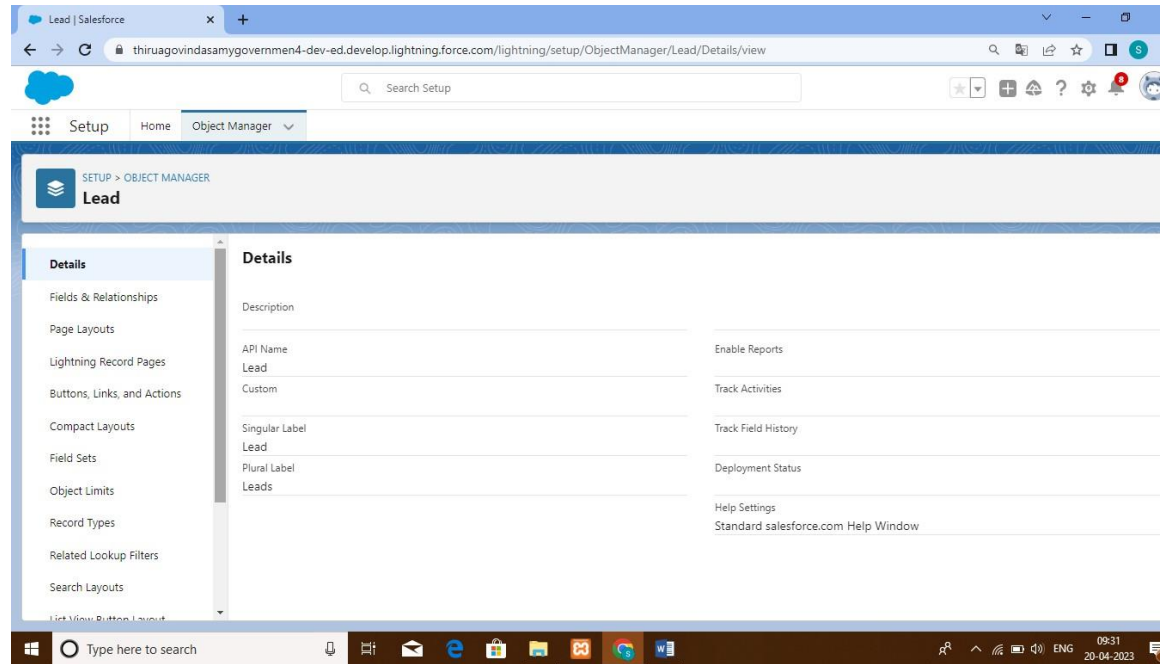
https://thiruagovindasamygovermen4-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0115i0000019vac/ButtonsLinksActions/view

Type here to search

ENG 09:31 20-04-2023

4.

Project Report Template



Lead | Salesforce

thiruagovindasamygovermen4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Lead/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Lead

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

Details

Description

API Name
Lead

Enable Reports

Custom

Track Activities

Singular Label
Lead

Track Field History

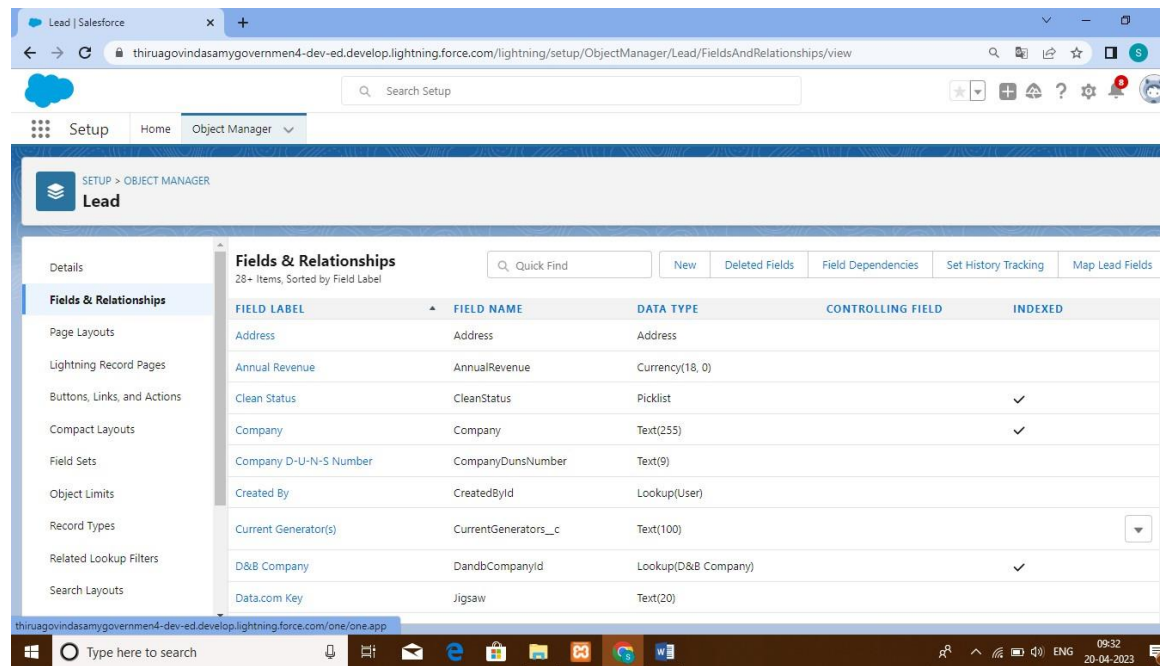
Plural Label
Leads

Deployment Status

Help Settings
Standard salesforce.com Help Window

Type here to search

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20-04-2023



Lead | Salesforce

thiruagovindasamygovermen4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Lead/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Lead

Fields & Relationships

28+ Items, Sorted by Field Label

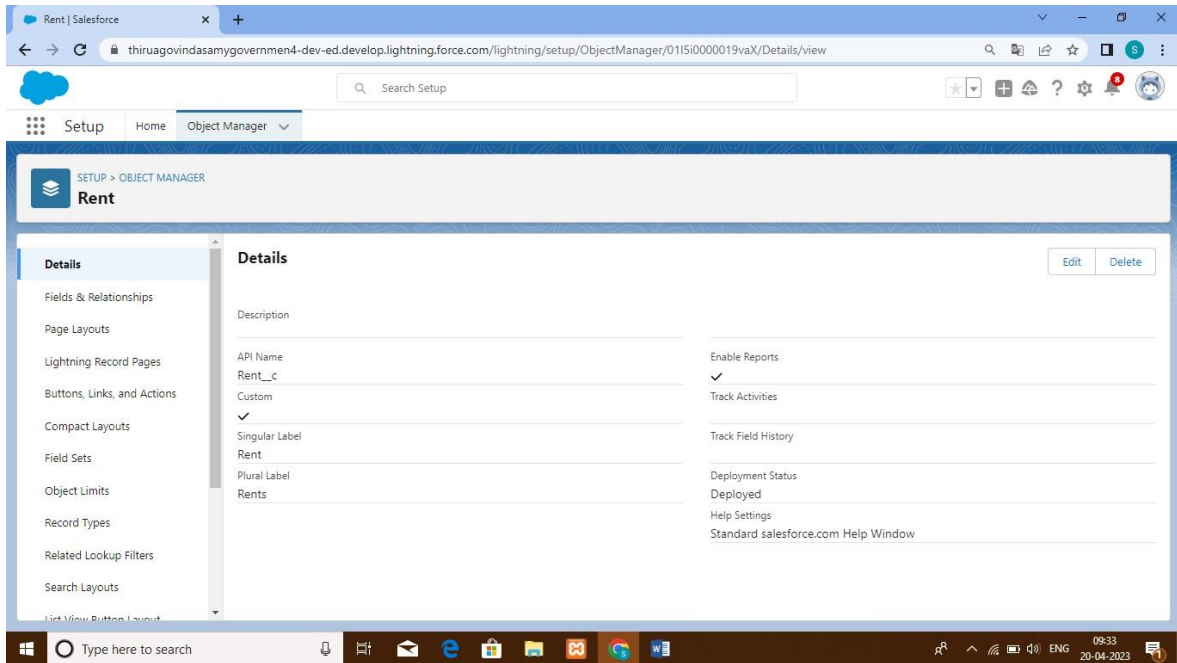
Quick Find New Deleted Fields Field Dependencies Set History Tracking Map Lead Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address	Address		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Clean Status	CleanStatus	Picklist		✓
Company	Company	Text(255)		✓
Company D-U-N-S Number	CompanyDunsNumber	Text(9)		
Created By	CreatedById	Lookup(User)		
Current Generator(s)	CurrentGenerators_c	Text(100)		
D&B Company	DandbCompanyId	Lookup(D&B Company)		✓
Data.com Key	Jigsaw	Text(20)		

thiruagovindasamygovermen4-dev-ed.develop.lightning.force.com/one/one.app

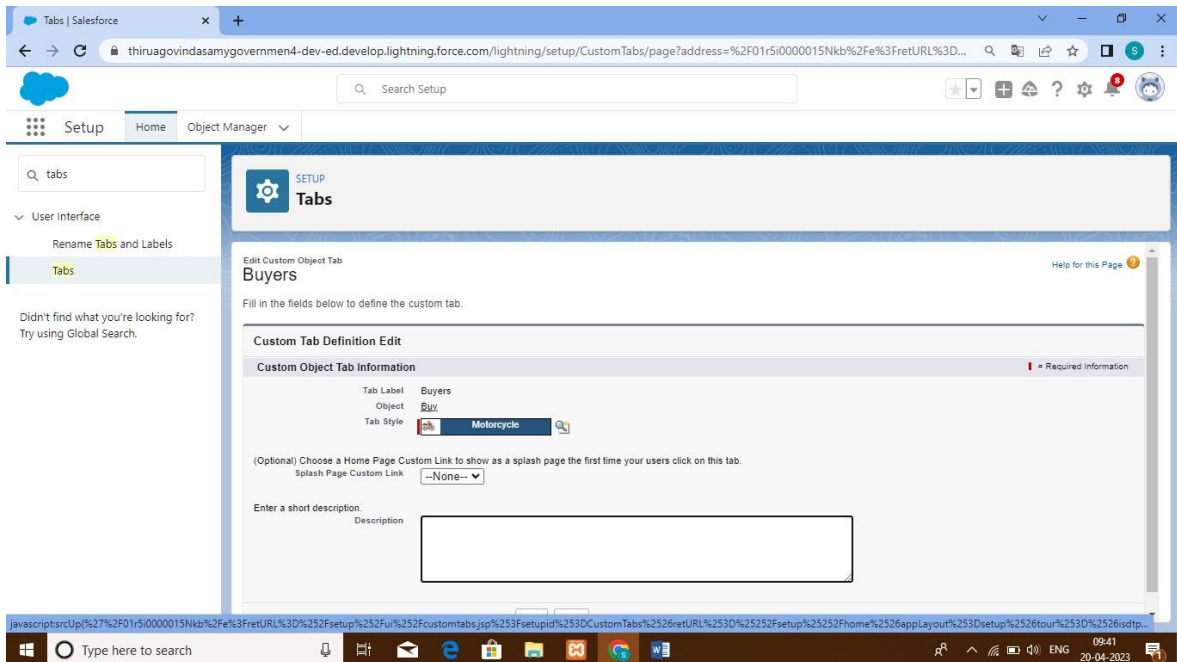
Type here to search

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20-04-2023

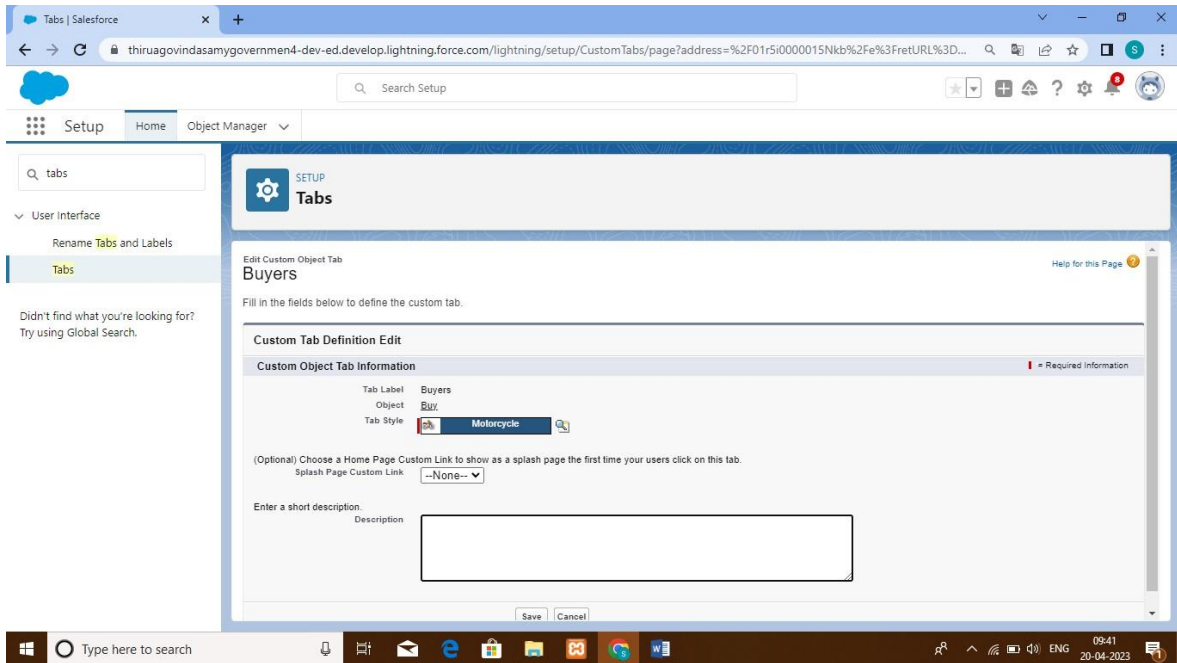


Tabs;

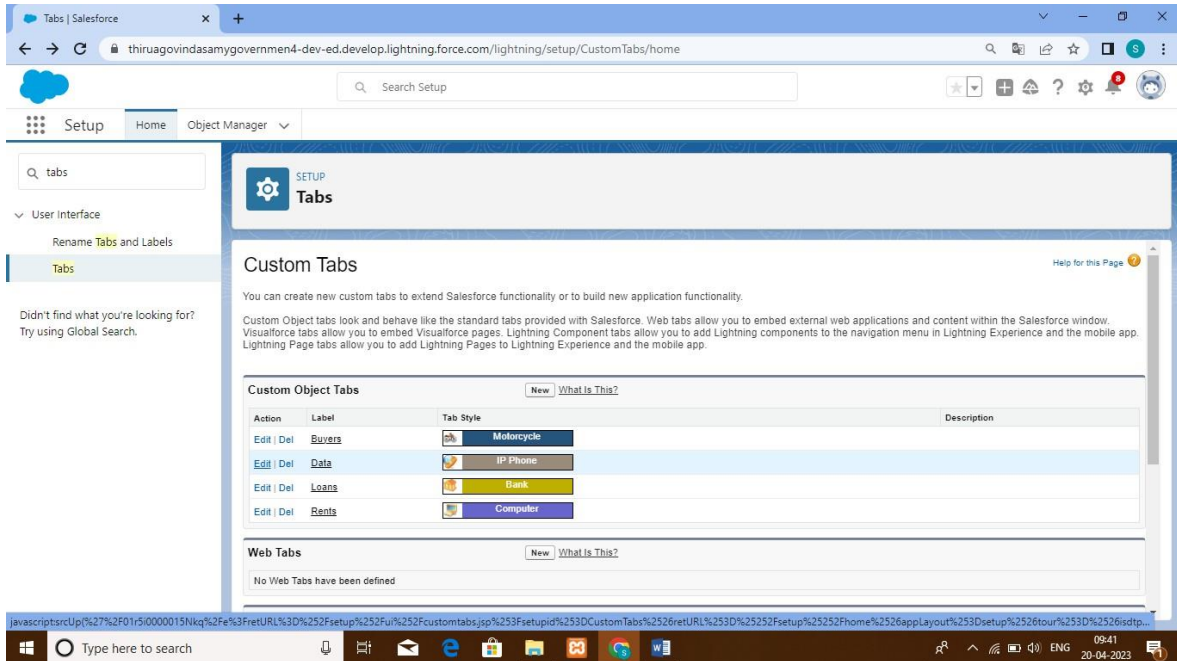
1.



2.



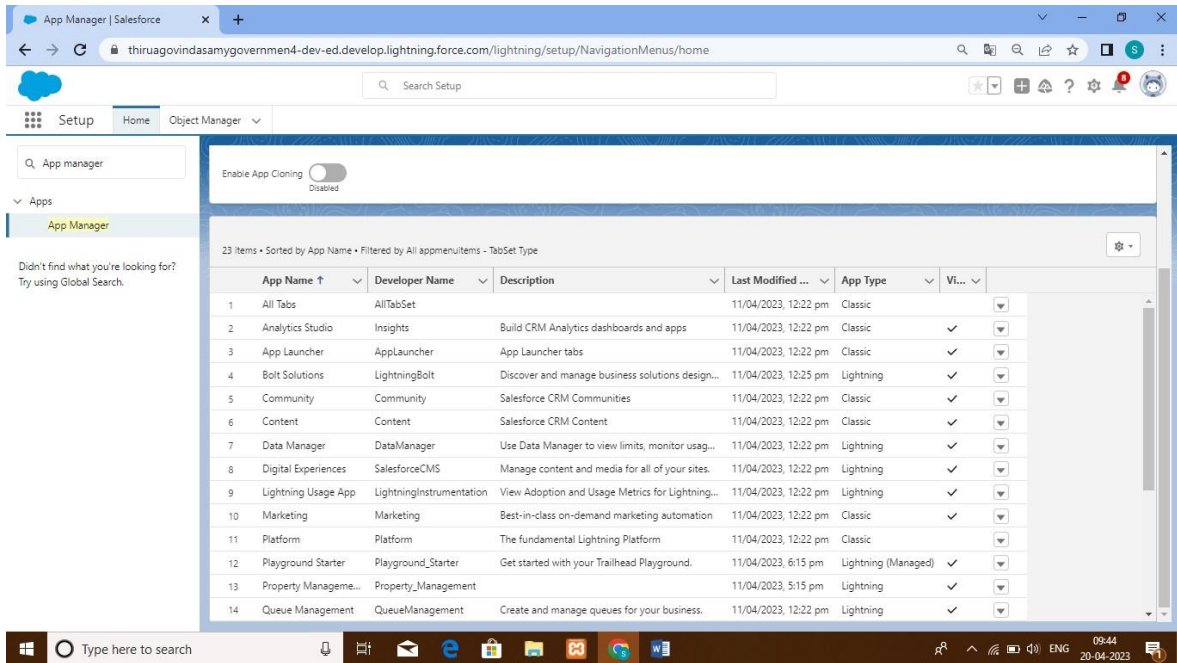
2.



Lightning App;

1.

Project Report Template



App Manager | Salesforce

thiruagovindasamygovernmen4-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

App manager

Apps

App Manager

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

Enable App Cloning Disabled

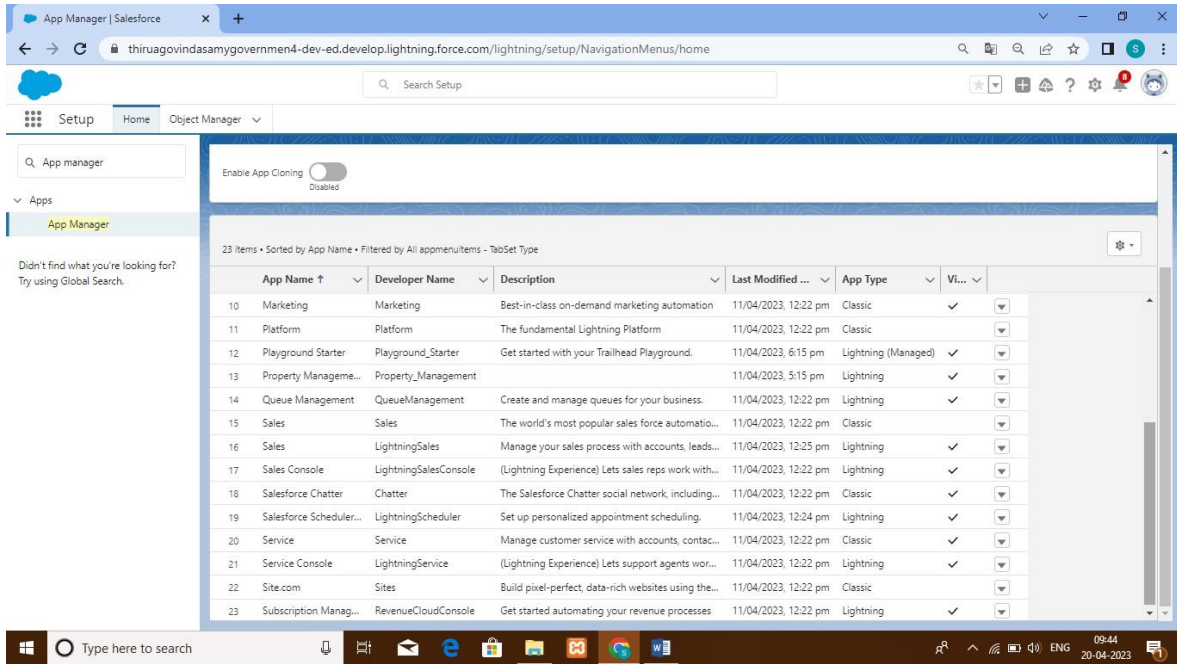
23 Items • Sorted by App Name • Filtered by All app menu items - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	App Type	Vi...
1	All Tabs	AllTabSet		11/04/2023, 12:22 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	11/04/2023, 12:22 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	11/04/2023, 12:22 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions design...	11/04/2023, 12:25 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	11/04/2023, 12:22 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	11/04/2023, 12:22 pm	Classic	✓
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usag...	11/04/2023, 12:22 pm	Lightning	✓
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	11/04/2023, 12:22 pm	Lightning	✓
9	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning...	11/04/2023, 12:22 pm	Lightning	✓
10	Marketing	Marketing	Best-in-class on-demand marketing automation	11/04/2023, 12:22 pm	Classic	✓
11	Platform	Platform	The fundamental Lightning Platform	11/04/2023, 12:22 pm	Classic	
12	Playground Starter	Playground_Starter	Get started with your Trailhead Playground.	11/04/2023, 6:15 pm	Lightning (Managed)	✓
13	Property Managem...	Property_Management		11/04/2023, 5:15 pm	Lightning	✓
14	Queue Management	QueueManagement	Create and manage queues for your business.	11/04/2023, 12:22 pm	Lightning	✓

Type here to search

09:44 20-04-2023

2.



App Manager | Salesforce

thiruagovindasamygovernmen4-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

App manager

Apps

App Manager

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

Enable App Cloning Disabled

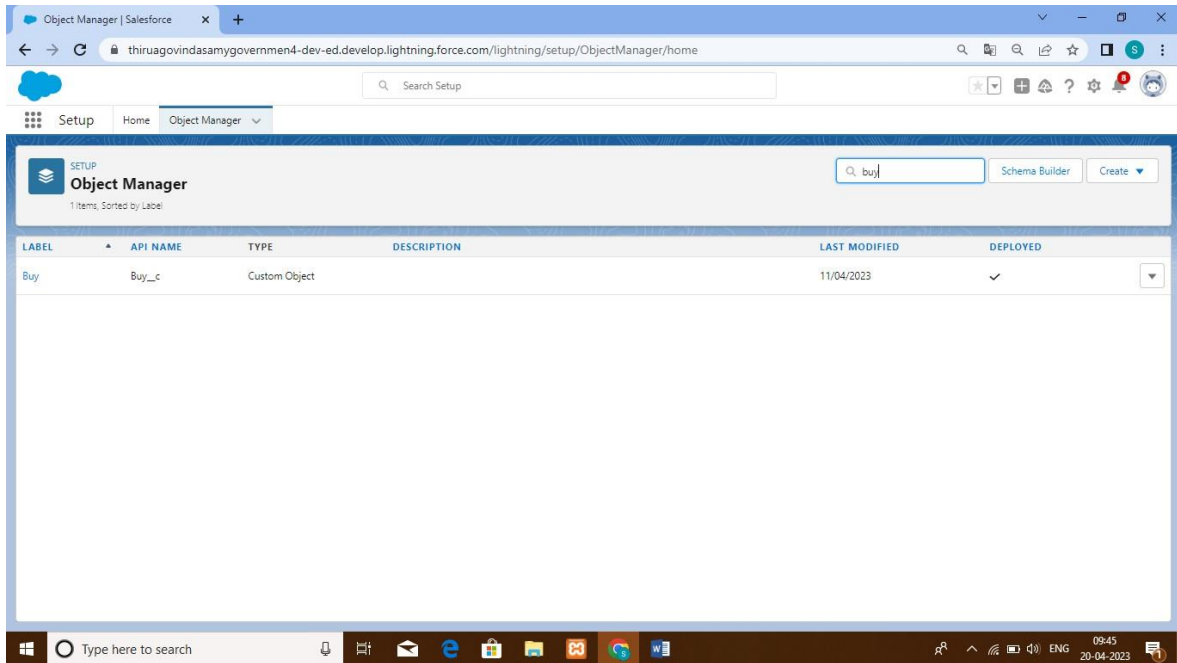
23 Items • Sorted by App Name • Filtered by All app menu items - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	App Type	Vi...
10	Marketing	Marketing	Best-in-class on-demand marketing automation	11/04/2023, 12:22 pm	Classic	✓
11	Platform	Platform	The fundamental Lightning Platform	11/04/2023, 12:22 pm	Classic	
12	Playground Starter	Playground_Starter	Get started with your Trailhead Playground.	11/04/2023, 6:15 pm	Lightning (Managed)	✓
13	Property Managem...	Property_Management		11/04/2023, 5:15 pm	Lightning	✓
14	Queue Management	QueueManagement	Create and manage queues for your business.	11/04/2023, 12:22 pm	Lightning	✓
15	Sales	Sales	The world's most popular sales force automatio...	11/04/2023, 12:22 pm	Classic	
16	Sales	LightningSales	Manage your sales process with accounts, leads...	11/04/2023, 12:25 pm	Lightning	✓
17	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with...	11/04/2023, 12:22 pm	Lightning	✓
18	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including...	11/04/2023, 12:22 pm	Classic	✓
19	Salesforce Scheduler...	LightningScheduler	Set up personalized appointment scheduling.	11/04/2023, 12:24 pm	Lightning	✓
20	Service	Service	Manage customer service with accounts, contac...	11/04/2023, 12:22 pm	Classic	✓
21	Service Console	LightningService	(Lightning Experience) Lets support agents wor...	11/04/2023, 12:22 pm	Lightning	✓
22	Site.com	Sites	Build pixel-perfect, data-rich websites using the...	11/04/2023, 12:22 pm	Classic	
23	Subscription Manag...	RevenueCloudConsole	Get started automating your revenue processes	11/04/2023, 12:22 pm	Lightning	✓

Type here to search

09:44 20-04-2023

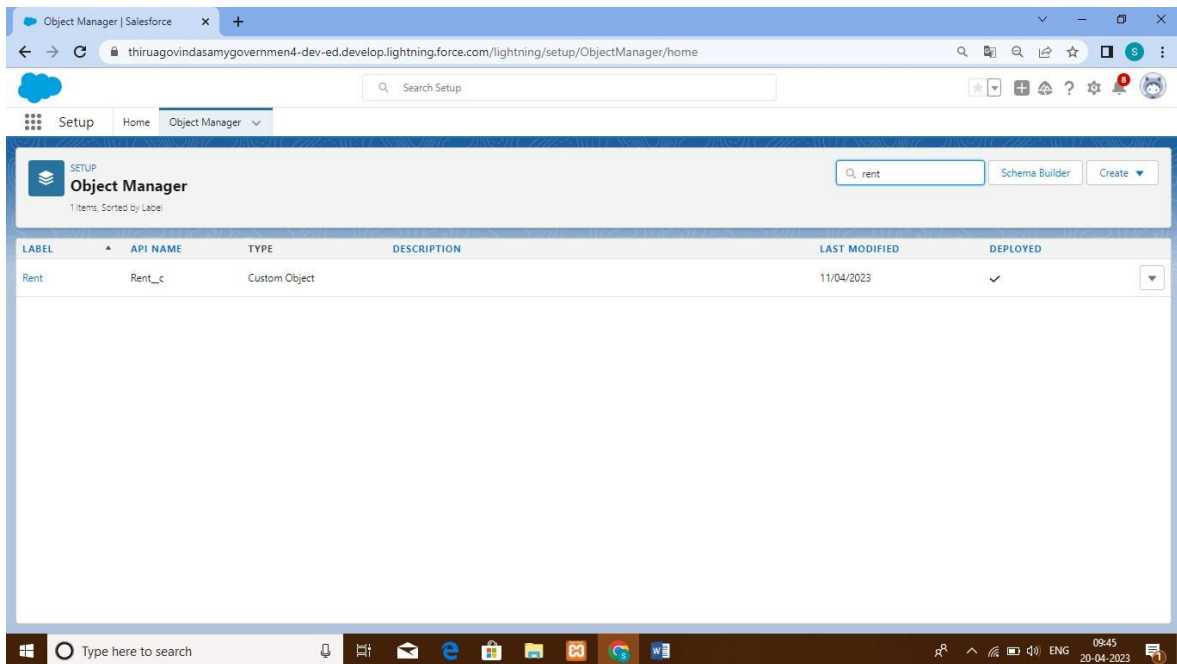
Buy;



The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: `thiruagovindasamygovermen4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is "Object Manager | Salesforce". The navigation bar includes "Setup", "Home", and "Object Manager". The main content area shows a table with one item, "Buy", which is a Custom Object. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The "Buy" object was last modified on 11/04/2023 and is deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Buy	Buy_c	Custom Object		11/04/2023	✓

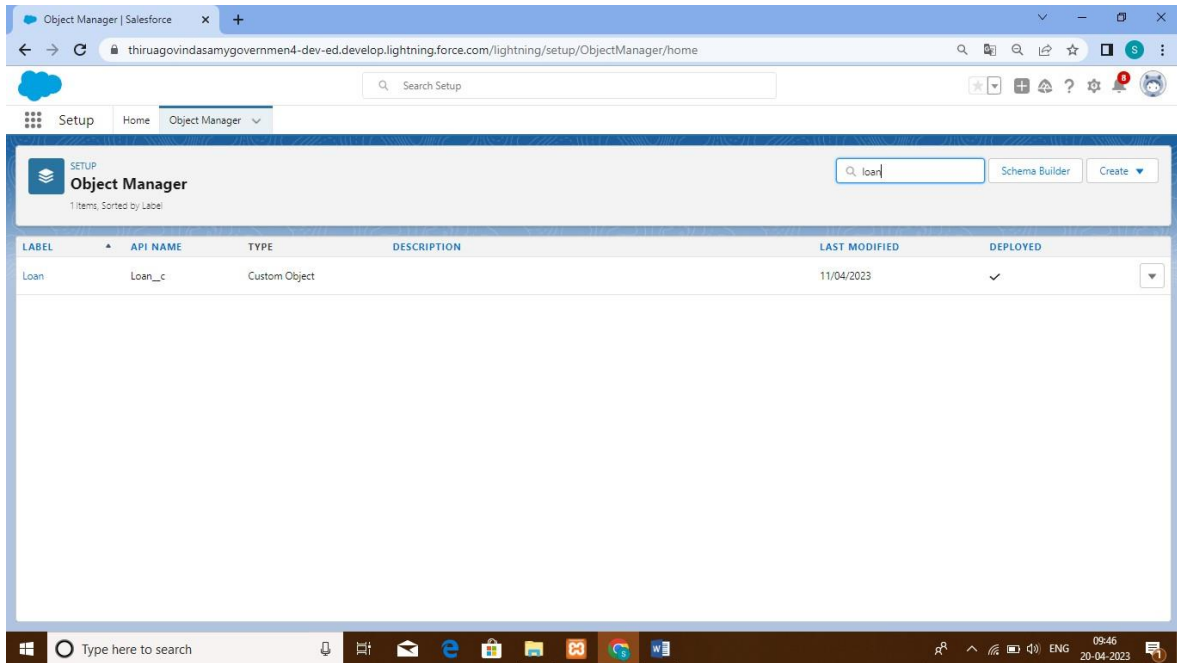
2. Rent;



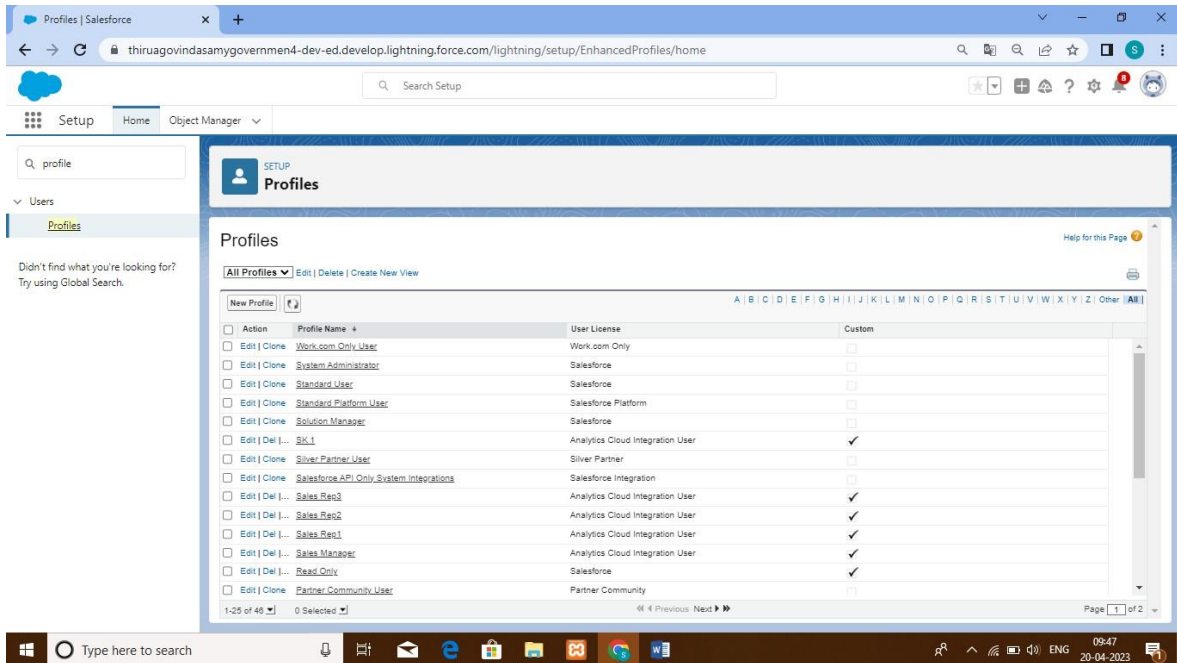
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LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Rent	Rent_c	Custom Object		11/04/2023	✓

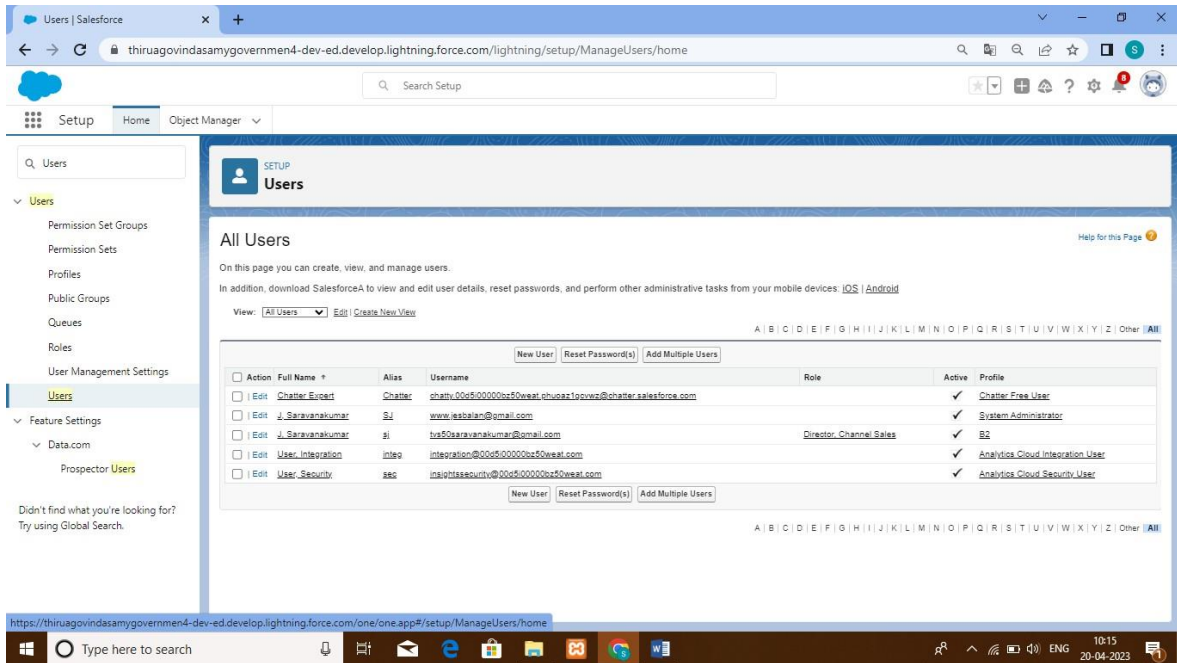
3. Loan;



Profile;

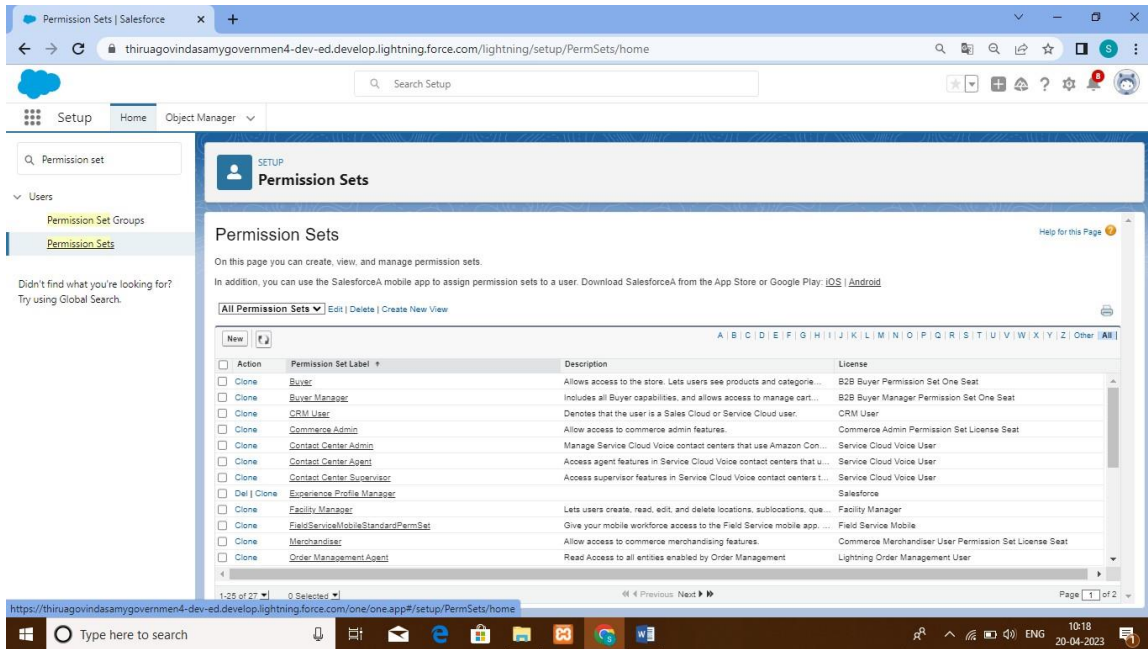


Users;

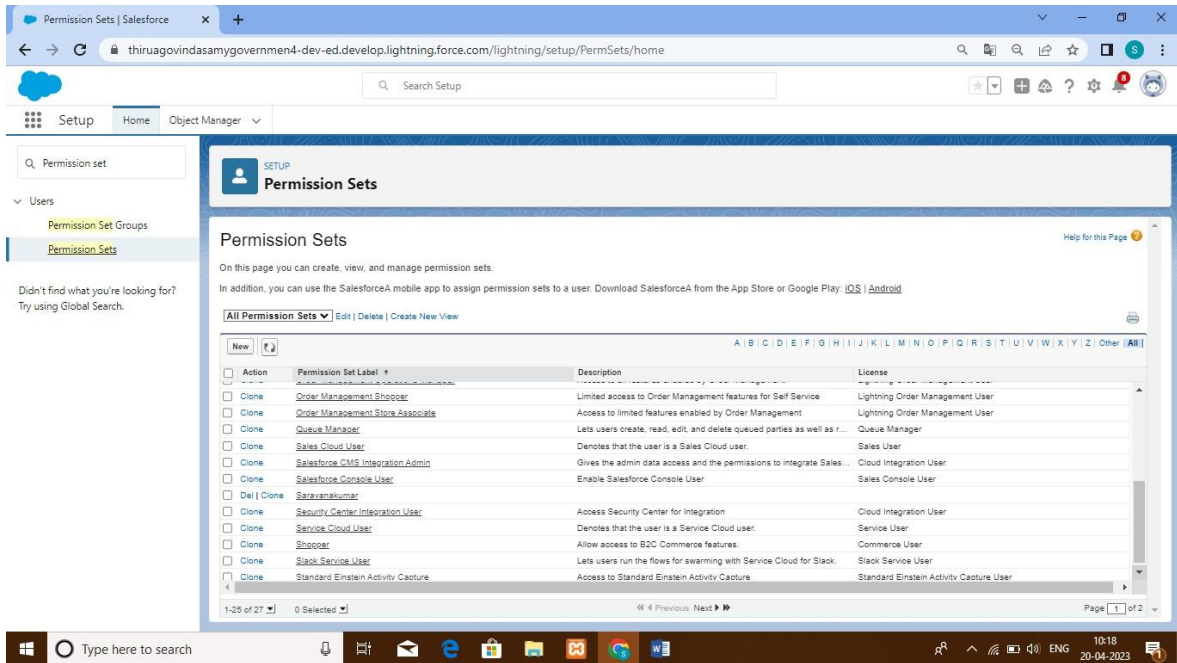


The screenshot shows the Salesforce 'Users' setup page. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'All Users' and includes instructions on how to create, view, and manage users. Below the instructions, there is a table of users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table lists several users, including 'Chatter_Eveast', 'J. Saravananumar', 'User_Integration', and 'User_Security'. At the bottom of the page, there is a Windows taskbar with various application icons and a system clock showing 10:15 on 20-04-2023.

Permission Set;



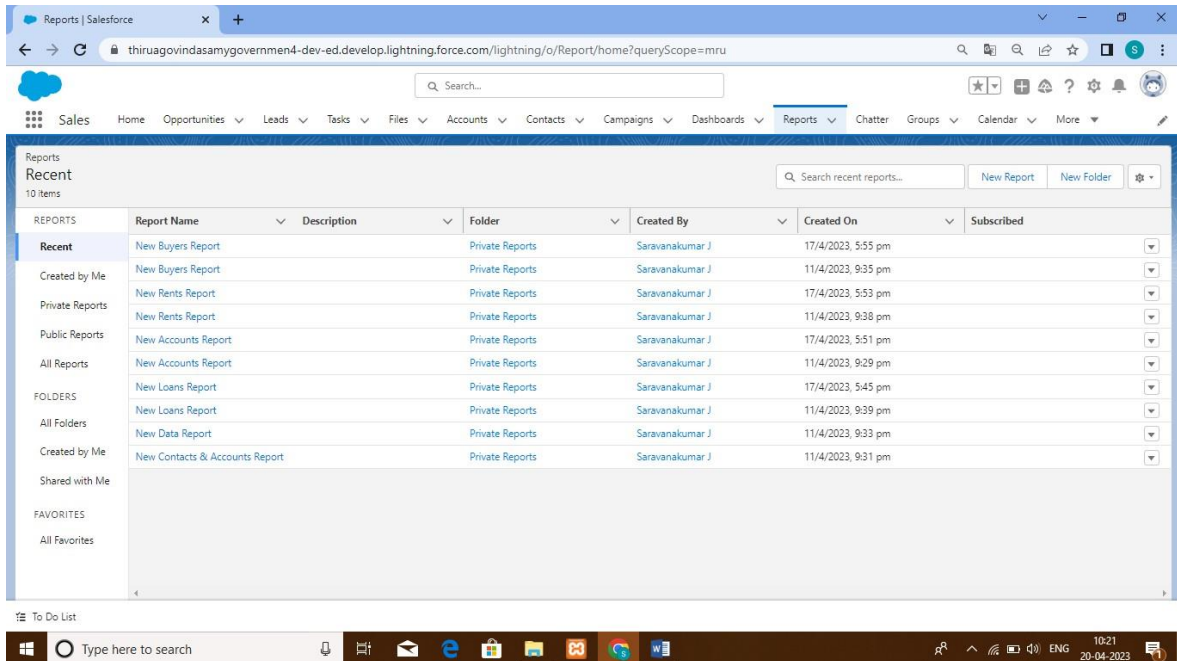
The screenshot shows the Salesforce 'Permission Sets' setup page. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', and 'Permission Sets'. The main content area is titled 'Permission Sets' and includes instructions on how to create, view, and manage permission sets. Below the instructions, there is a table of permission sets with columns for Action, Permission Set Label, Description, and License. The table lists several permission sets, including 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Supervise Profile Manager', 'Facility Manager', 'Field Service Mobile Standard Permission Set', 'Merchandiser', and 'Order Management Agent'. At the bottom of the page, there is a Windows taskbar with various application icons and a system clock showing 10:18 on 20-04-2023.



The screenshot shows the Salesforce 'Permission Sets' page. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Permission Sets' and includes a search bar, a 'New' button, and a table of existing permission sets. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone: Order Management Shopper	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Clone: Order Management Store Associate	Access to limited features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Clone: Queue Manager	Lets users create, read, edit, and delete queued parties as well as r...	Queue Manager
<input type="checkbox"/>	Clone: Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
<input type="checkbox"/>	Clone: Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Sales...	Cloud Integration User
<input type="checkbox"/>	Clone: Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/>	Del Clone: Saravanakumar		
<input type="checkbox"/>	Clone: Security Center Integration User	Access Security Center for Integration	Cloud Integration User
<input type="checkbox"/>	Clone: Service Cloud User	Denotes that the user is a Service Cloud user.	Service User
<input type="checkbox"/>	Clone: Shopper	Allow access to B2C Commerce features.	Commerce User
<input type="checkbox"/>	Clone: Slack Service User	Lets users run the flows for swarming with Service Cloud for Slack.	Slack Service User
<input type="checkbox"/>	Clone: Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User

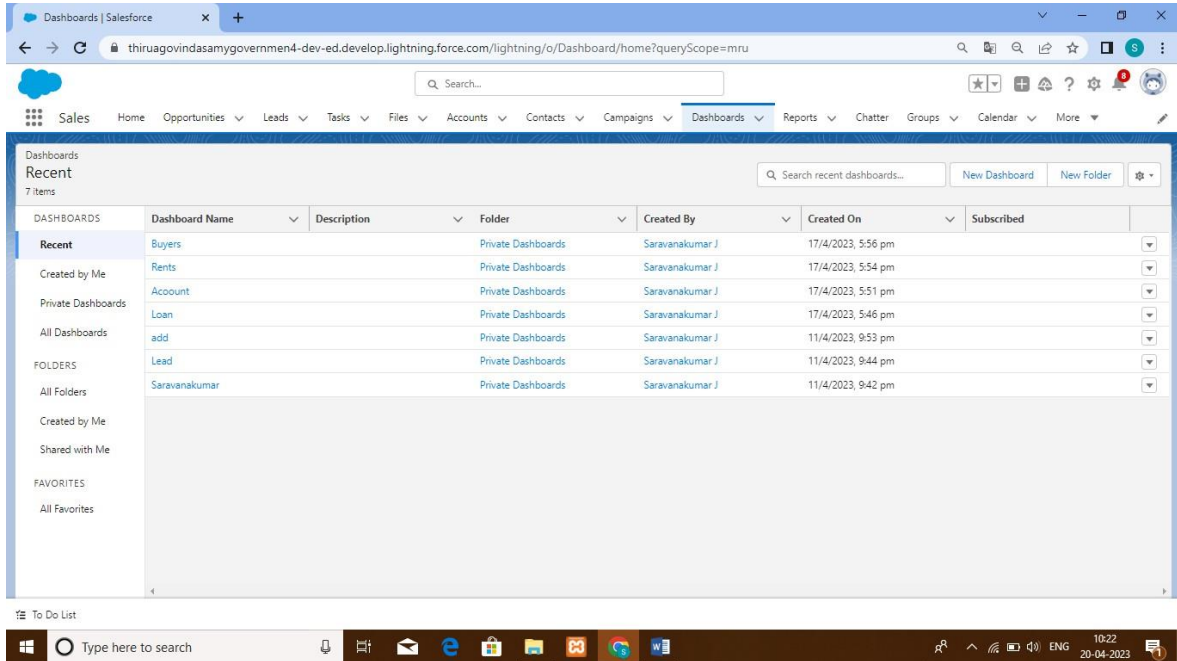
Reports;



The screenshot shows the Salesforce 'Reports' page. The left sidebar contains navigation links for 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', and 'More'. The main content area is titled 'Reports' and includes a search bar, a 'New Report' button, and a table of recent reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Buyers Report		Private Reports	Saravanakumar J	17/4/2023, 5:55 pm	
New Rents Report		Private Reports	Saravanakumar J	17/4/2023, 5:53 pm	
New Rents Report		Private Reports	Saravanakumar J	11/4/2023, 9:38 pm	
New Accounts Report		Private Reports	Saravanakumar J	17/4/2023, 5:51 pm	
New Loans Report		Private Reports	Saravanakumar J	11/4/2023, 9:29 pm	
New Loans Report		Private Reports	Saravanakumar J	17/4/2023, 5:45 pm	
New Data Report		Private Reports	Saravanakumar J	11/4/2023, 9:39 pm	
New Data Report		Private Reports	Saravanakumar J	11/4/2023, 9:33 pm	
New Contacts & Accounts Report		Private Reports	Saravanakumar J	11/4/2023, 9:31 pm	

Dashboards;

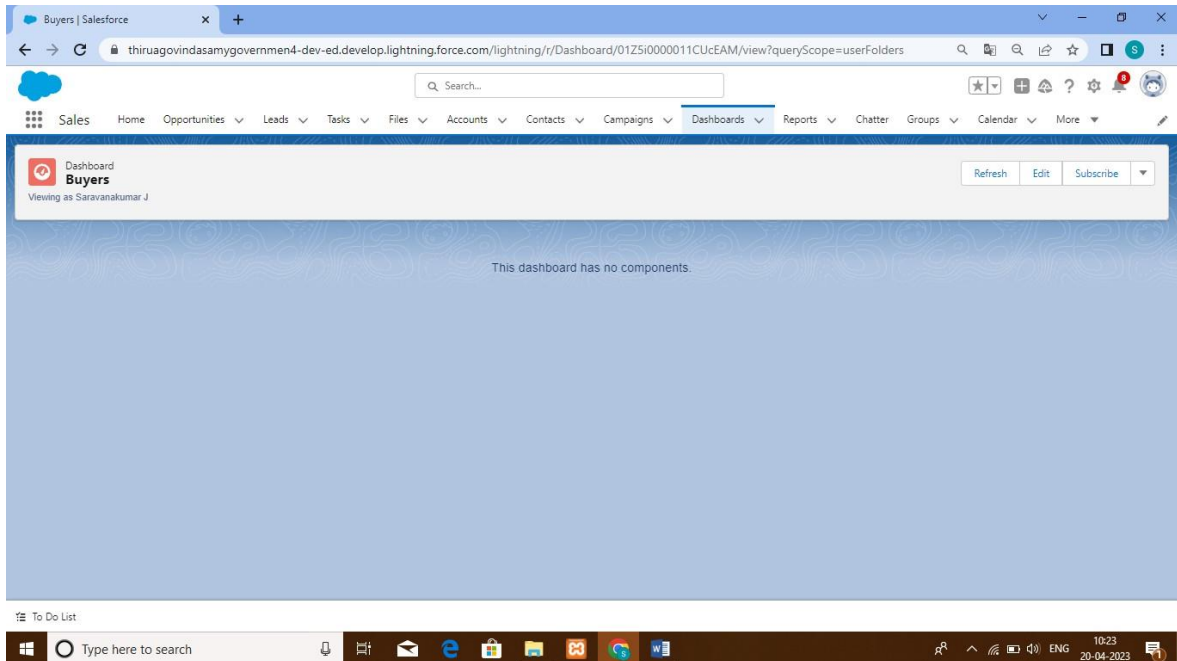


The screenshot shows the Salesforce Dashboards page. The left sidebar contains navigation links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards (selected), Reports, Chatter, Groups, Calendar, and More. The main content area displays a list of recent dashboards under the heading "Recent Dashboards".

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Buyers		Private Dashboards	Saravanakumar J	17/4/2023, 5:56 pm	
Created by Me	Rents		Private Dashboards	Saravanakumar J	17/4/2023, 5:54 pm	
Private Dashboards	Account		Private Dashboards	Saravanakumar J	17/4/2023, 5:51 pm	
All Dashboards	Loan		Private Dashboards	Saravanakumar J	17/4/2023, 5:46 pm	
	add		Private Dashboards	Saravanakumar J	11/4/2023, 9:53 pm	
FOLDERS	Lead		Private Dashboards	Saravanakumar J	11/4/2023, 9:44 pm	
All Folders	Saravanakumar		Private Dashboards	Saravanakumar J	11/4/2023, 9:42 pm	

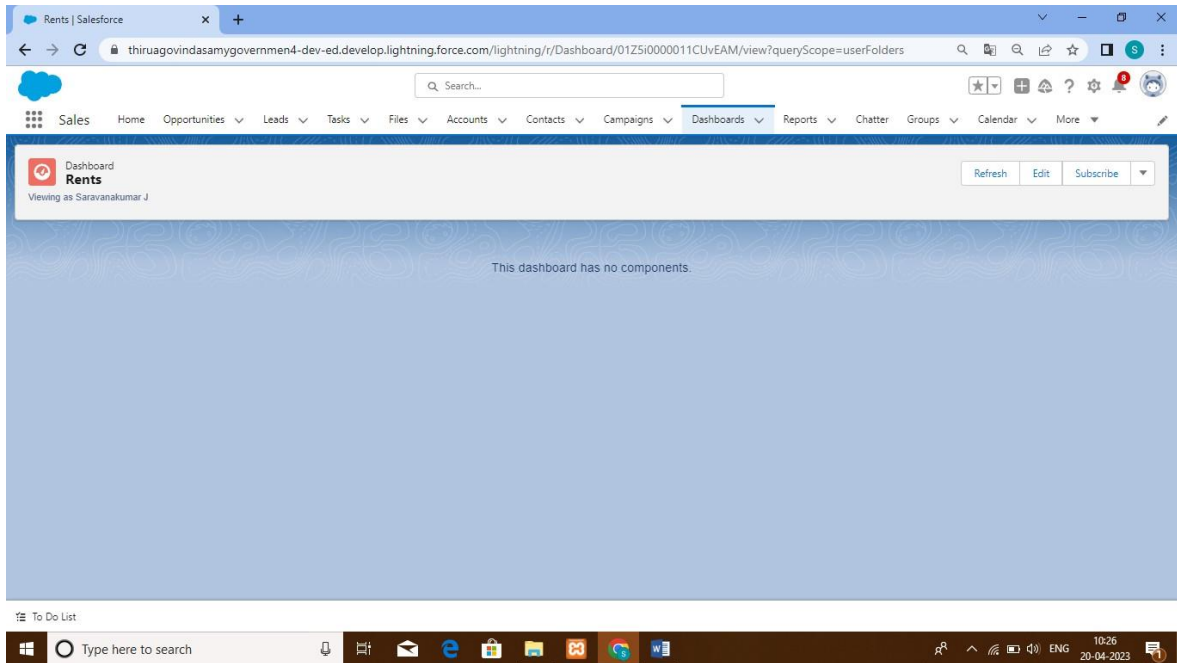
The bottom of the screenshot shows the Windows taskbar with the search bar and various application icons.

1. Buyers;

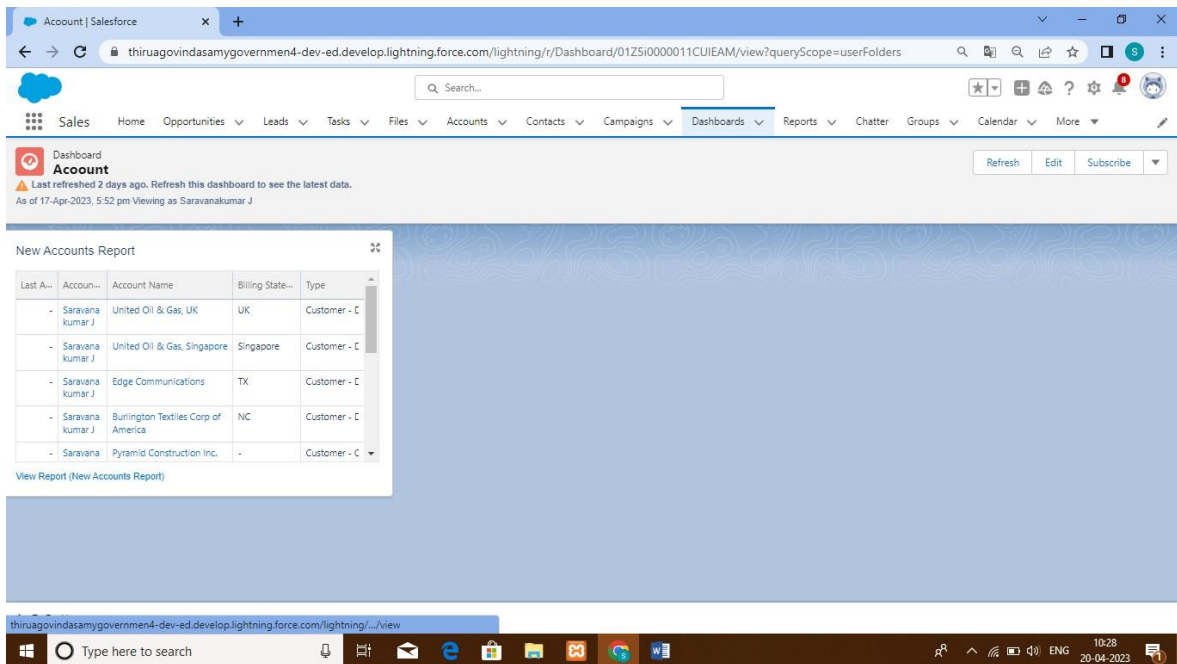


The screenshot shows the Salesforce Buyers dashboard. The left sidebar is the same as the previous screenshot. The main content area displays the "Buyers" dashboard, which is currently empty. The dashboard header shows "Dashboard Buyers" and "Viewing as Saravanakumar J". Below the header, there is a message: "This dashboard has no components." The dashboard also includes buttons for "Refresh", "Edit", and "Subscribe".

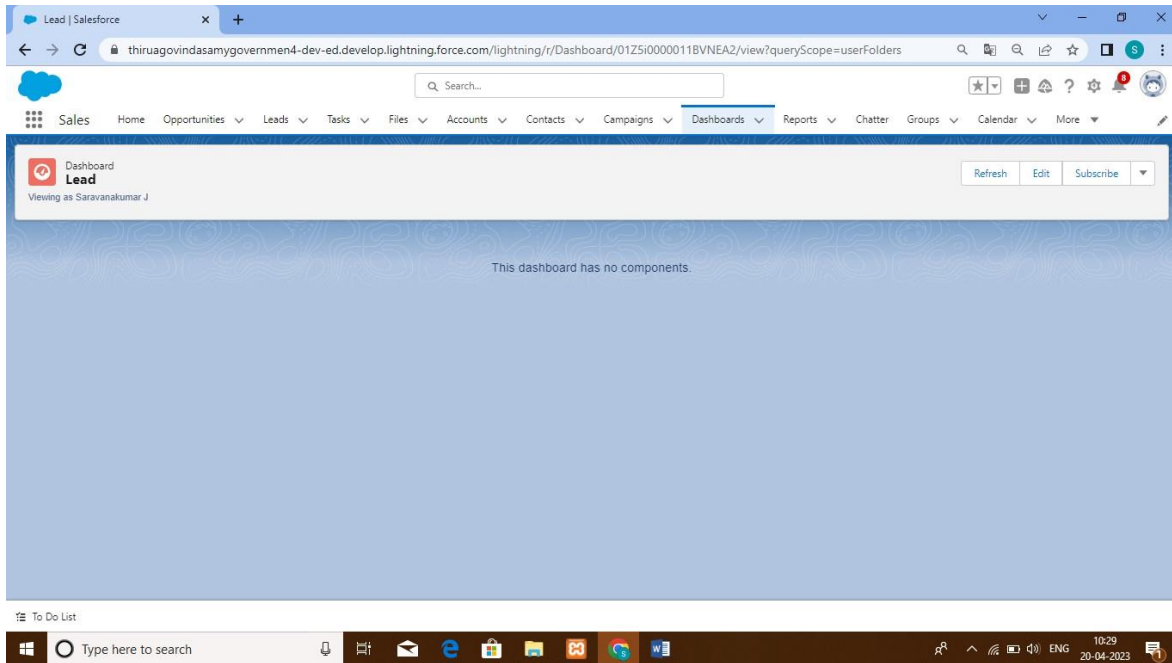
2. Rents;



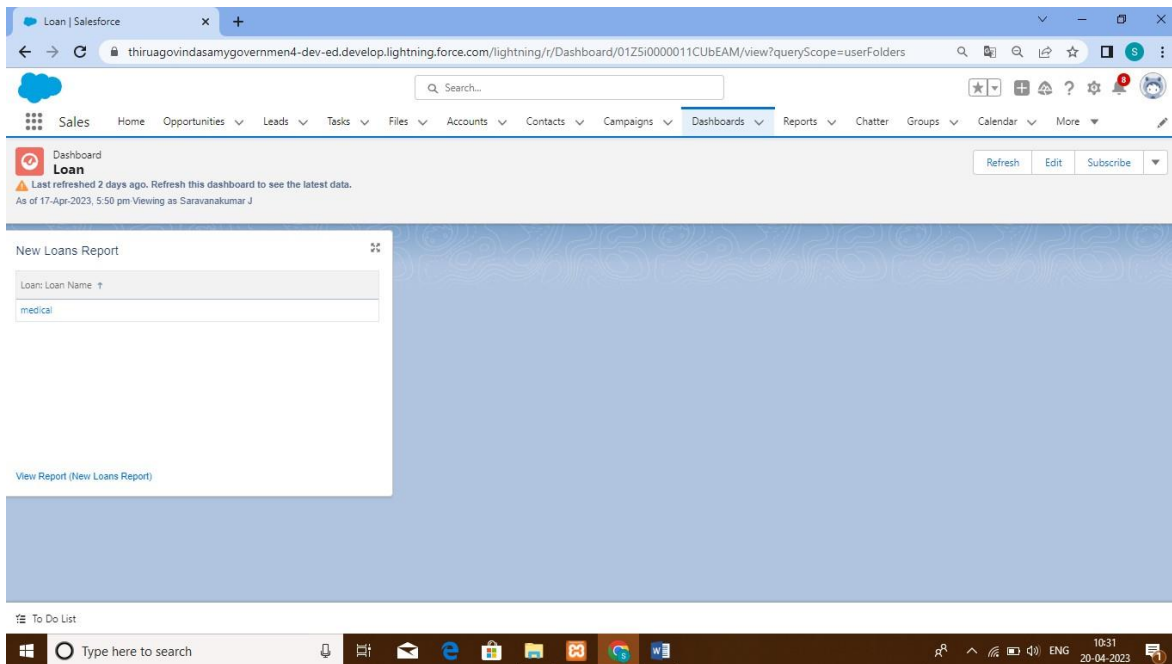
3.Account;



4,Lead;



Loan;



Advantages of the project;

1. **Centralized Data:** Salesforce provides a centralized platform to store all property-related data, including leasing, maintenance, payments, and tenant information. It helps property managers to manage their properties efficiently and effectively.
2. **Customizable Platform:** Salesforce is a highly customizable platform that can be tailored to meet the specific requirements of property management companies. It

Project Report Template

can be integrated with third-party applications to provide an all-in-one solution for property management.

3. Automation: Salesforce allows property managers to automate many of their routine tasks, such as rent collection, lease renewal, maintenance requests, and tenant communication. This reduces the need for manual intervention and saves time and resources.

4. Improved Communication: Salesforce provides a powerful communication tool that enables property managers to stay in constant contact with their tenants. They can send notifications, alerts, and messages to tenants via email or SMS, making it easier to communicate effectively.

5. Enhanced Reporting: Salesforce provides powerful reporting capabilities that allow property managers to generate reports on key performance metrics, such as occupancy rates, rent collection, and maintenance costs. These reports can be analyzed to identify trends and make informed decisions about property management.

Disadvantages of the project;

1. Steep Learning Curve: Implementing Salesforce for property management applications requires special expertise, which can take time and cost resources to acquire.

2. High Cost: Salesforce is a premium software suite, which means it can be expensive to set up and maintain for small to mid-sized property management businesses.

3. Limited Customizability: While Salesforce offers a lot of features out of the box, it may not be customizable or flexible enough to meet the unique needs of all property management businesses.

4. Dependence on Internet Connectivity: Since Salesforce is cloud-based, it relies heavily on a stable internet connection. If the connection is weak, it can affect its performance and result in system downtime.

5. Security Risks: Hosting data on a cloud-based platform like Salesforce can increase the risk of data breaches and cyber-attacks. This is particularly crucial for property management businesses dealing with sensitive customer data, like financial transactions and personal information.

3 APPLICATIONS

The areas where this solution can be applied

4 CONCLUSION

A property management application using Salesforce can greatly benefit property managers and landlords in managing their

properties more efficiently. With features such as tenant and lease management, maintenance tracking, and analytics, property managers can have a comprehensive view of their properties and make informed decisions. Additionally, having all information stored in a centralized database can improve communication and collaboration between team members. Overall, utilizing Salesforce for property management can lead to increased productivity and profitability for property managers and their businesses.

7.FUTURE SCOPE

There is a huge scope for property management applications using Salesforce in the future. Here are some of the key areas where this technology can play a significant role:

1. Improved Customer Experience: With Salesforce, property managers can offer their tenants an interactive and personalized experience through digital channels.
2. Efficient Property Management: By automating tasks and processes, property managers can save time and increase productivity, resulting in efficient property management.
3. Data Analytics: Property management applications can leverage the data that is collected throughout the tenant life cycle to glean insights that help managers make more informed decisions.
4. High Transparency: Salesforce enables property managers to have real-time transparency regarding leases, assets, availability, maintenance, and expenses.
5. Revenue Growth: Property management applications using Salesforce can help property managers identify opportunities for revenue growth, such as identifying high-value tenants or properties in need of design upgrades.
6. Integration with IoT and Smart Home Devices: With the increased adoption of IoT and smart home devices, Salesforce can offer property managers a seamless way to integrate with these technologies.
7. Better Collaboration across Teams: Property management applications that use Salesforce can enable property managers to collaborate efficiently across teams, such as compliance, finance, maintenance, and leasing.

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