

## **PROPERTY MANAGEMENT APPLICATION USING SALESFORCE**

### **1 INTRODUCTION**

#### **1.1 Overview**

Salesforce Customer 360 is our entire portfolio of products and services. It's an integrated customer relationship management (CRM) platform that helps companies transform their businesses by uniting their marketing, sales, commerce, service, and IT teams with a single, shared customer view. With Customer 360, the world's #1 CRM, your entire company can work on one trusted platform with best-in-class apps that are easy to use and free to learn, united by a single, shared view of your customer data. That increases collaboration and alignment among all your teams, which leads to lower costs, increased productivity, and efficient growth by exceeding customer expectations.. Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this. Develop an App for the 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 upto 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 Customer 360 is a platform designed to provide a comprehensive view of each customer across all touchpoints and systems. It allows businesses to consolidate customer data from various sources, such as sales, marketing, service, and commerce, into a single, unified customer profile. This provides a holistic understanding of

customer interactions, preferences, and behaviors, which can help businesses optimize customer engagement.

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

### 2.3 Empathy Map



### Property Management

Property management is the daily oversight of residential, commercial, or industrial real estate by a third-party contractor, generally, Property managers take responsibility for day-to-day repairs and ongoing maintenance, security, and uptake of properties, They usually work for the owners of investment properties such as apartment and condominium complexes, private home communities, shopping centers and industrial parks.

#### 1. Property View on Property and Tenants

Property Managers might see a lot of properties and tenants to manage, which can be over whelming.

They might see maintenance tasks and work orders pilling up, which can be stressful.

They might see tenants stuggling with rent payments or maintenance issues, which can be frustrating.

## **2.Complaints and Maintenance of Property/Customer**

Property Managers might hear complaints from tenants about maintenance issues or other problems.

They might hear Feedback from contractors or maintenance personnel about work orders.

They might hear requests for rent payment reminders or other notifications.

## **3.Keep Track on Maintenance tasks/order**

Property managers might say things like “I need a better way to manage all of these properties and tenants”.

They might say “I wish there was an easier way keep track of maintenance tasks and work orders”.

They might say “I want to make sure my tenants are happy and satisfied with their living experience”.

Ability to manage rent payments track expenses and generate financial reports.

## **4.Time management**

Property managers might spend a lot of time manually tracking properties tenants and maintenance tasks.

They might spend time communication with tenants and contractors via phone, email or text.

They might spend time analyzing data and making decisions based on that data.

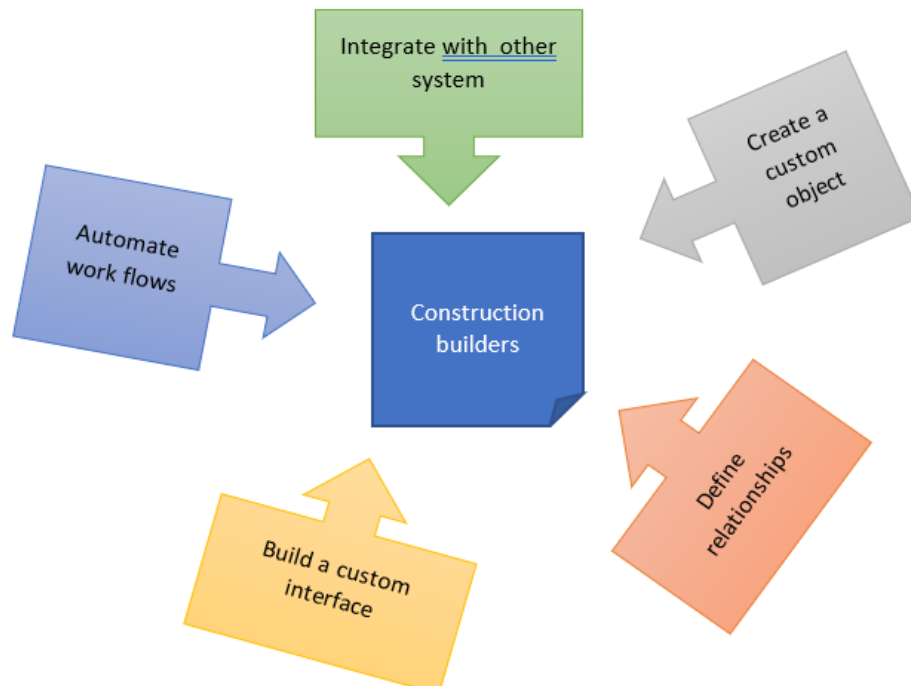
## **5.Ensure their responsibility to the customer satisfaction**

Property managers might feel overwhelmed by the amount of work they have to do.

They might feel stressed about keeping up with maintenance tasks and work orders.

They might feel a sense of responsibility to ensure their tenants are happy and satisfied with their living experience.

## **2.2Ideation & Brainstorming map screenshot**



### **Create a custom object:**

In salesforce navigate if to setup>object manager and click the “New custom object” button name the object “property” and define the fields you want to track for each property, such as address, types ,size, number of bedrooms/bathrooms, and any other relevant information.

### **Define relationships:**

If you need to track relationships between properties and other objects, such as owners or tenants, you can create lookup or master detail relationship between the objects. For example, you could create a lookup relationship between the property object and the contact object to track the property owner.

### **Build a custom interface**

To make it easy for property managers to view and edit property data, You can build a custom interface using salesforce using salesforce lightning components. For example you could create a tab for the property object and add custom components to display property details and related data.

### **Automatic work flows**

You can use salesforce work flow rules and process builder to automate property management tasks. For example, You could create a workflow rule to automatically assign new properties a property manager based on locations.

### **Integrate with other system**

If you need to integrate your property management application with other systems, such as accounting software or maintenance tracking tolls, you can use sales force's APIS and integration tools to connect the systems and sync data

## **3 RESULT**

### **3.1 Data Model:**

Object Name	Fields in the Object	
Object 1: Buy	Field label	Data type
	Buy name	Text(80)
	Owner	Lookup(User,Group)
Object 2: Rent	Field label	Data type
	Owner	Lookup(User,Group)
	Rent name	Text(80)

Object 3: Lead		
	Field label	Data type
	Lead name	Text(80)
	Owner	Lookup(User,Group)
Object 4: Loan		
	Field label	Data type
	Loan name	Text(80)
	Owner	Lookup(User,Group)
Object 5: Student		
	Field label	Data type
	Lead	Auto Number
	Loan	Phone
	Student name	Text(80)

## 2.1 Activity and Screenshot

### Creating Developer Account

Creating a developer org in salesforce.

Go to [developers.salesforce.com/](https://developers.salesforce.com/)

Click on sign up.

On the sign up form, enter the following details :

First name & Last name

Email

Role : Developer

Company : College Name

County : India

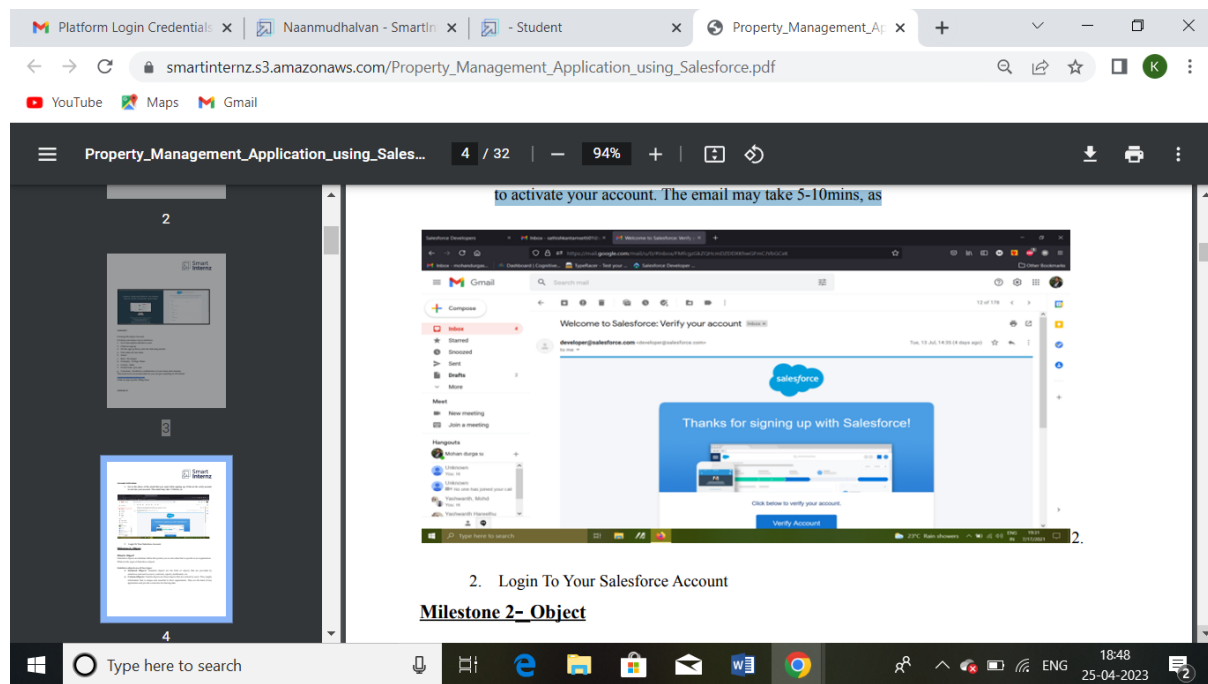
Postal Code : pin code

Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format

Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account activate your account.



## Create Object Buy

To create an object:

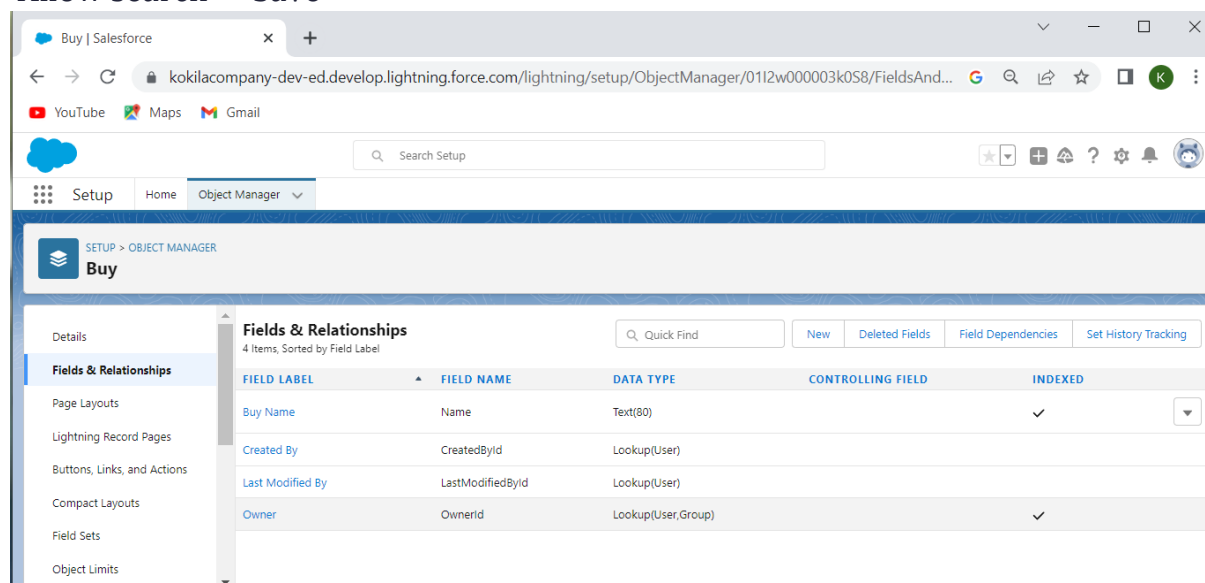
From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

Enter the label name → Buy

plural label name → Buyers

click on Allow reports,

Allow search → Save



## Create Object Rent

To create an object:

From the setup page → Click on Object Manager → Click on Create → Click on Custom

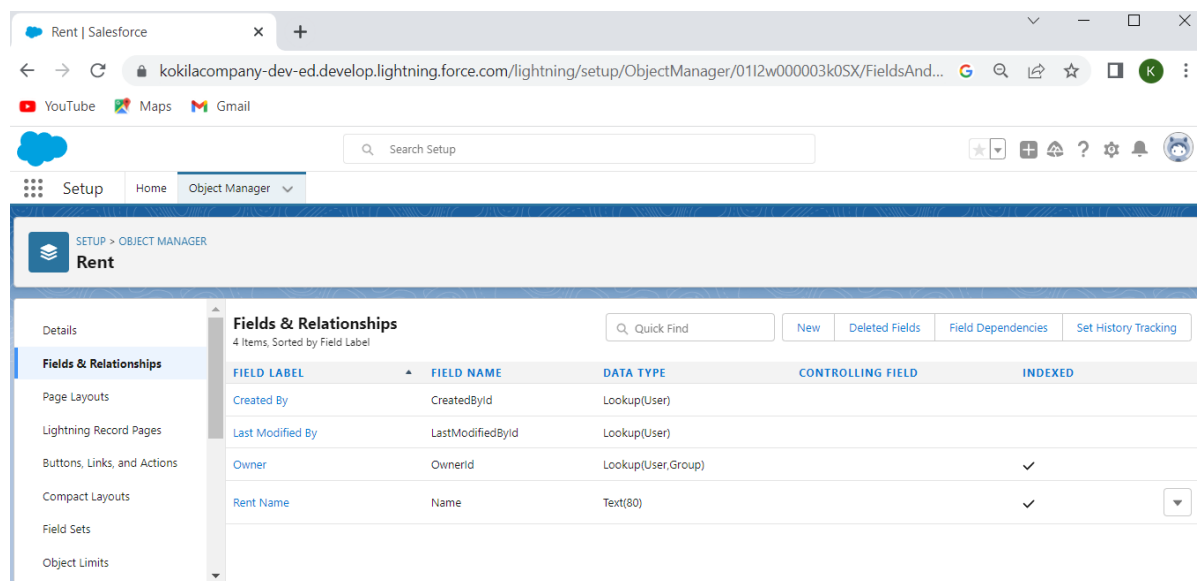
Object.

Enter the label name→Rent

plural label name→ Rents

click on Allow reports,

Allow search → Save



The screenshot shows the Salesforce Object Manager setup page for the 'Rent' object. The page is titled 'Rent | Salesforce' and the URL is 'kokilacompany-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003k0SX/FieldsAnd...'. The left sidebar shows the navigation menu with 'Setup', 'Home', and 'Object Manager' selected. The main content area is titled 'SETUP > OBJECT MANAGER Rent' and displays the 'Fields & Relationships' section. The table below lists the fields for the 'Rent' object.

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 Name	Name	Text(80)		✓

## Create Object Loan

To create an object:

From the setup page → Click on Object Manager → Click on Create → Click on Custom

Object.

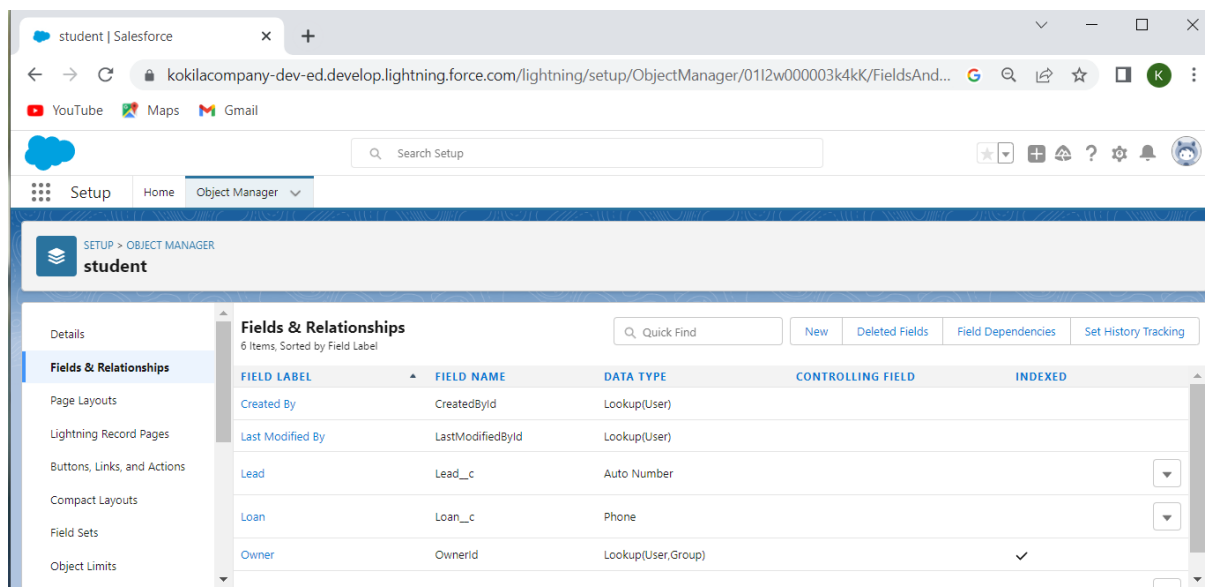
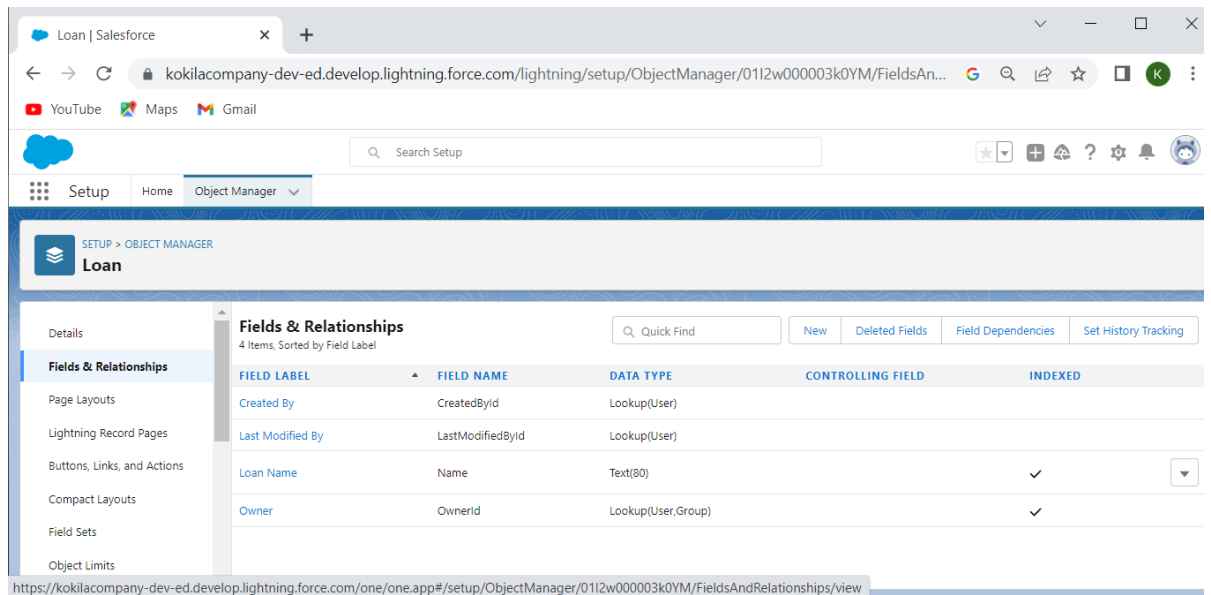
Enter the label name→Loan

plural label name→ Loans

click on Allow reports,

Allow search → Save



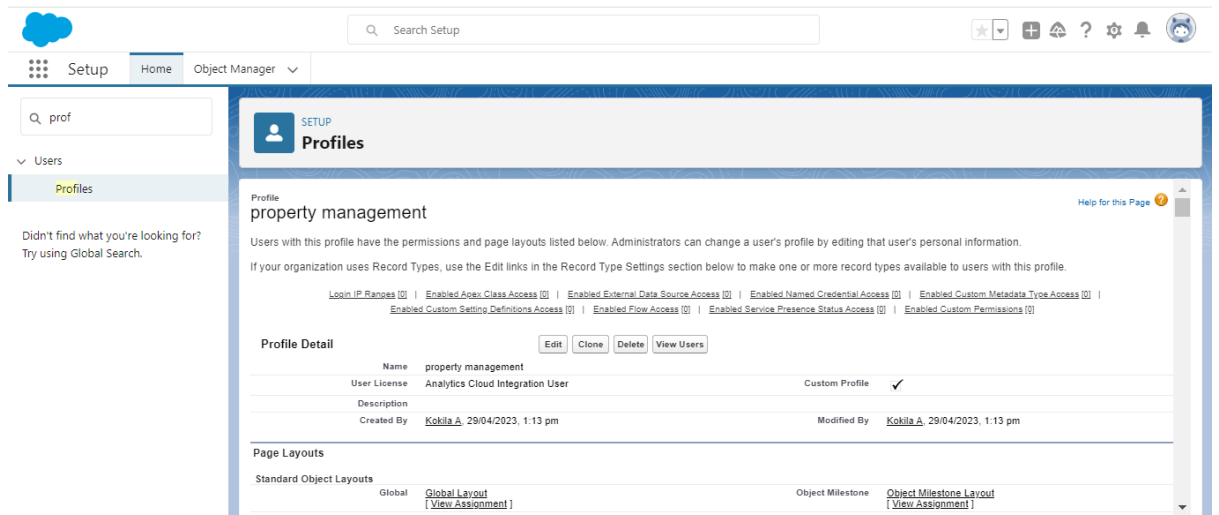


## Profile

To create a new profile:

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired

profile (standard user is preferable) → enter profile name → save  
 6. Sales Manager → Standard user Profile , Marketing Executive1 and Executive2 → Standard Platform User, Marketing Manager → Standard Platform User For



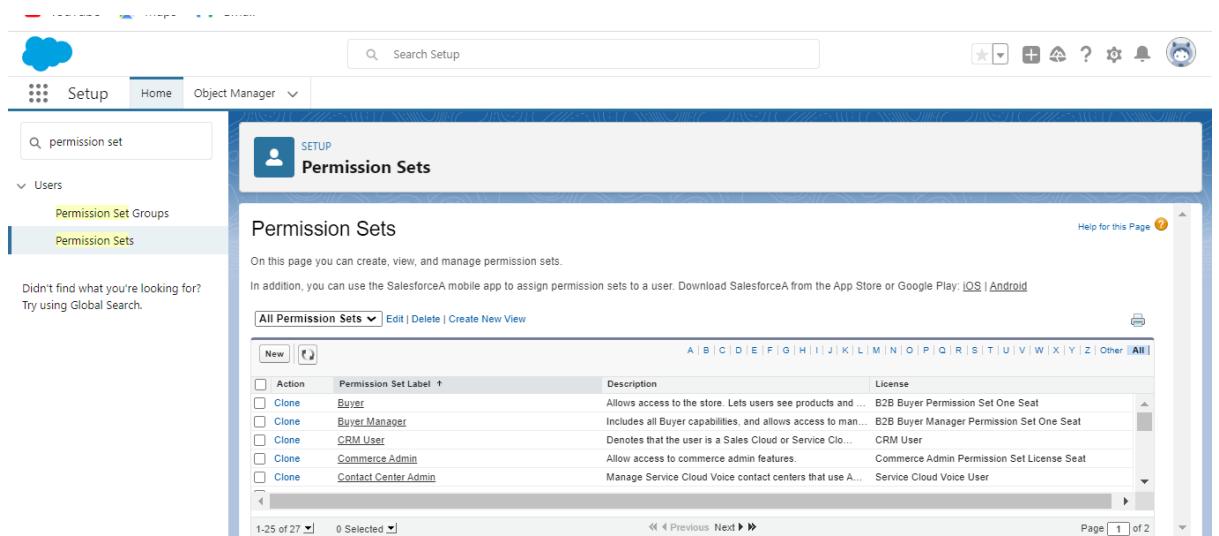
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "prof" and a list of items including "Users" and "Profiles". The main content area is titled "Profiles" and shows the "property management" profile. It includes a list of enabled access types, a "Profile Detail" section with fields like Name, User License, Description, and Created By, and a "Page Layouts" section showing the "Global" layout and "Object Milestone" layout.

## Permission Set

Create the Permission Set

Go to setup → type “permission sets” in quick search → select permission

Sets -new



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "permission set" and a list of items including "Users", "Permission Set Groups", and "Permission Sets". The main content area is titled "Permission Sets" and shows a list of permission sets. The list has columns for Action, Permission Set Label, Description, and License. The list includes items like "Buyer", "Buyer Manager", "CRM User", "Commerce Admin", and "Contact Center Admin".

## Setup For OWD

## Create OWD Setting

1. Setup, use the Quick Find box to find Sharing Settings.
  2. Click Edit in the Organization-Wide Defaults area.
  3. For each object, select the default access you want to give everyone.
  4. To disable automatic access using your hierarchies, deselect Grant Access Using Hierarchies for Lead, Rent custom object
- ### Hierarchies for Lead, Rent custom object

The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar contains a search bar with "sharing setting" and a "Security" section with "Sharing Settings" highlighted. 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 an "Edit" button. The "Organization-Wide Defaults" table shows settings for various objects:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>

Below the table, a list of objects is shown with their default internal and external access settings and a checkbox for "Grant Access Using Hierarchies":

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Web Cart Document	Private	Private	<input checked="" type="checkbox"/>
Work Order	Private	Private	<input checked="" type="checkbox"/>
Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Buy	Private	Private	<input type="checkbox"/>
Lead	Private	Private	<input checked="" type="checkbox"/>
Loan	Private	Private	<input type="checkbox"/>
Rent	Private	Private	<input checked="" type="checkbox"/>
student	Private	Private	<input type="checkbox"/>

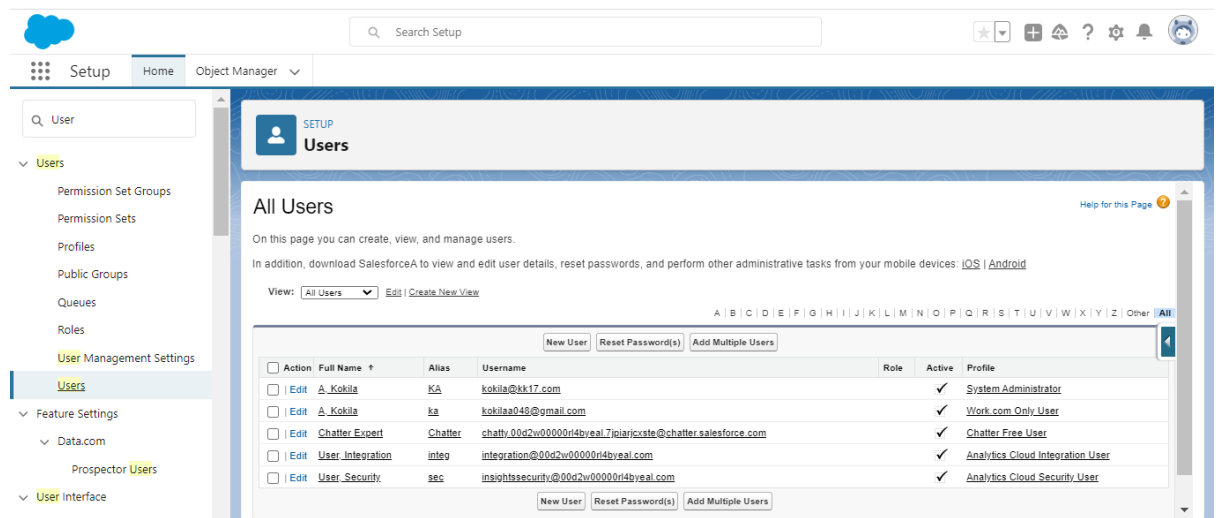
At the bottom, there is an "Other Settings" section with a "Manager Groups" checkbox.

## User

### Create User

1. Go to setup → type users in quick find box → select users → click New user

2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.



## Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics

### Types of Reports in Salesforce

Tabular

Summary

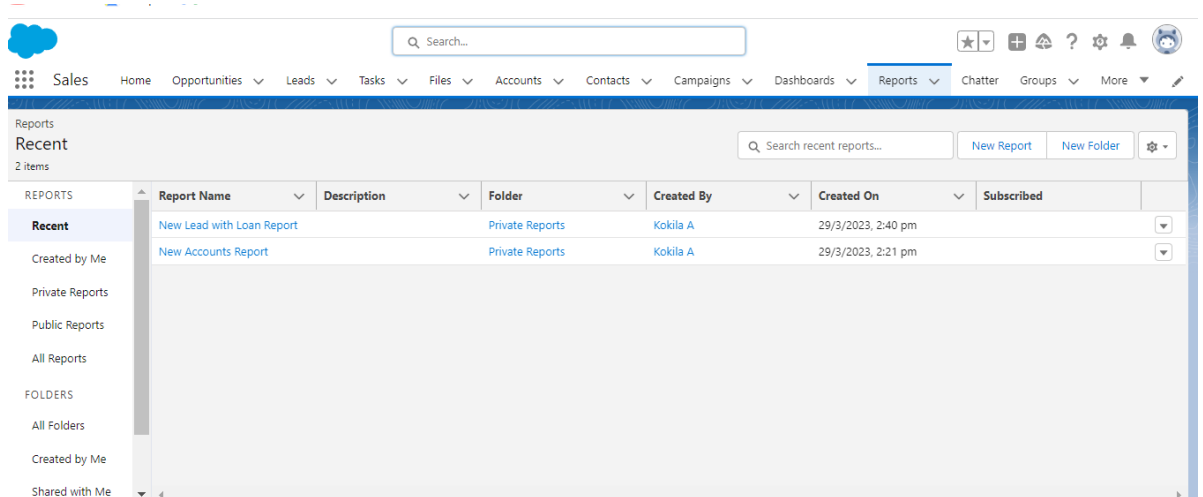
Matrix

Joined Reports

Activity

Go to the app → click on the reports tab

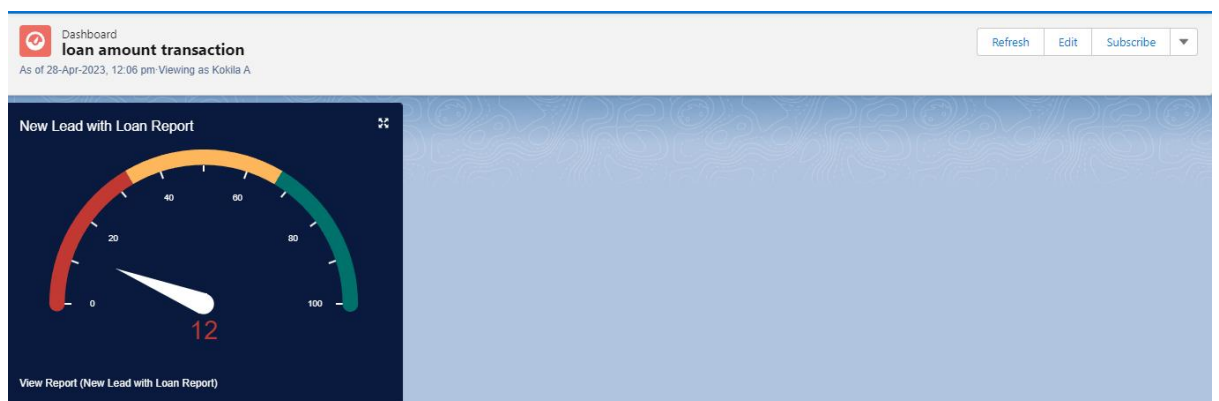
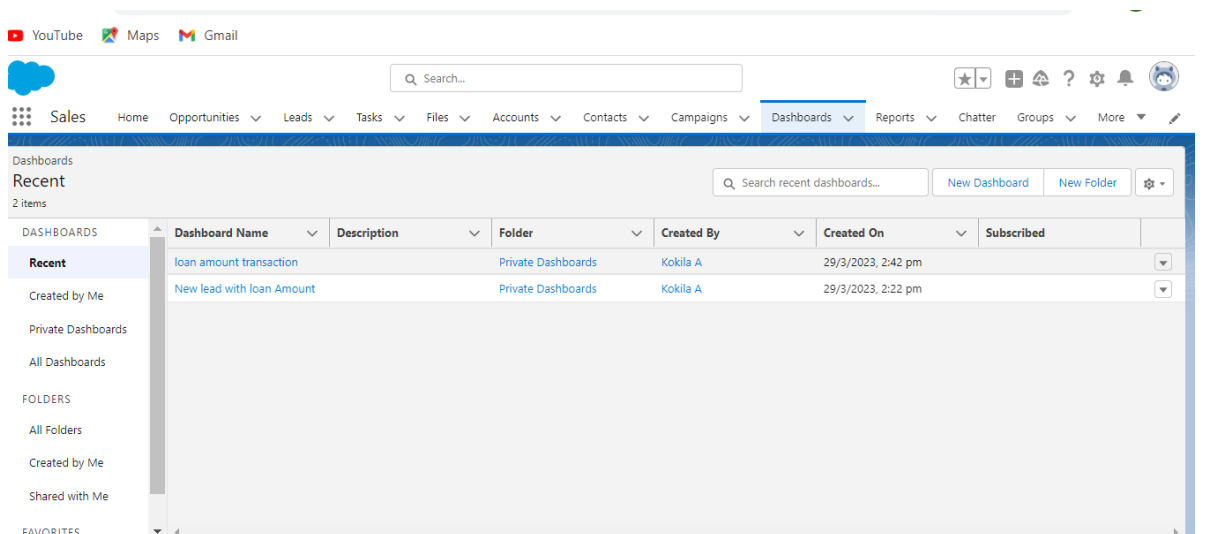
**Select report type from category or from report type panel or from search panel → click on start report**



## Dashboards

### Create dashboards

1. Go to the App Launcher and select the Dashboards
2. Select add component
3. Select the folder select the following option new lead with loan Amount



#### 4 Trailhead Profile Public URL

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

Team Member 1- <https://trailblazer.me/id/dhana16>

Team Member 2- [https://trailblazer https.me/id/tmani84](https://trailblazer.me/id/tmani84)

Team Member 3- <https://trailblazer.me/id/theki1234>

#### 5 ADVANTAGES & DISADVANTAGE

##### Advantages

Owning a rental property is usually very profitable. It helps the property owners have a steady income. However, this can only happen if the landlord has good tenants, who do not destroy their property. It can be very challenging and time-consuming for landlords to manage their properties. This is because they are likely to encounter problems emanating from their tenants. That's why many landlords choose to seek the services of [property management](#) company.

**You Will Work With Someone Who Has Experience.** By choosing to work with a professional, you are choosing to work with someone who has all the correct knowledge. When you hire experienced property managers, [like our team at Harper Properties](#), you can rest easy knowing that your properties are in the hands of people who know exactly what they are doing.

With our help, your properties will be well taken care of. Furthermore, if any issues arise, we will know exactly how to remedy them.

##### Disadvantage

**They Will Cost Money.** Naturally, you will need to pay your selected property management company.

Even though their services are very helpful, some people may be deterred by their payment. However, it would be best to keep in mind that property managers can save you money by keeping tenants happy and having properties stay vacant for shorter amounts of time.

At Harper Properties, we tend to get our clients better rent returns because we know the market rent due to the volume of rentals we manage. So, often our fees are covered by the increase we are likely to get.

**You Might Not Be As Involved.** Some landlords prefer to be more involved in their properties, taking care of tenants and maintenance themselves.

However, if you are the kind of property owner who wants to make every little decision, you might have issues with a property manager taking care of things for you.

Although, while this disadvantage is true for many property management companies, here at Harper Properties we encourage our clients to be as involved as they like. So, if you are a landlord who prefers to be hands-on, we will help you by working as an adviser.

No matter what your style of managing is, we will assist you as best as we

## **5.Application**

A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties. PMS is also used in manufacturing industries, local government and manufacturing. PMS provides a suite of services that can help firms monitor and optimize back-office activities and finances and even enhance the security of their properties.

Additionally, PMS enhances communication between tenants, owners, and managers, making it easier for all parties to stay informed and connected in real time.

## **6.CONCLUSION**

Property management requires people from all different backgrounds to work as a high performing team. As the owner of the firm and senior leader, I must be committed to diversity by removing my bias about young women and men. Now that I am aware and acknowledge my bias, I can develop a strategic plan that aligns with the firm's goals. Social media can encourage prejudice therefore it should not be the primary source of identifying candidates. Hiring human resource professional to screen resumes and participates in interview selection will also help mitigate bias in the firm. To create a competitive firm with growth and diversity, leaders must acknowledge their bias perception and find ways to eliminate them.

## **7.FUTURE SCOPE**

Property managers' work became very appreciated when the world started to suffer a pandemic. Property managers were underrated until their services were imperative to keep rental properties above water.

The twenty-twenties have assured a new era of property management, and here's what we see now and predict more of in the future of property management.

## **Resident Oriented**

The pandemic brought on many challenges for not only property managers but their residents as well. Property managers quickly shifted their attention to assist residents in creating payment plans and even helping people file for financial aid.

Taking care of their resident's needs and keeping them safe became imperative when the pandemic was at its peak. This need created a new trend of more empathetic and flexible property managers. This newfound attitude did not harm the profits but helped keep properties occupied and owners happy.

## **Better Communication**

Property managers are communicating more proactively with clients than ever before. Clients want prompt communication, and [property managers are using new creative ways](#) and software to streamline it. When there is better communication between



managers and clients, it opens up a whole world of opportunities for new services and benefits.

Instant messaging has taken over, leaving emails only for the most formal communications. Clients are contacted for quick decisions expediting matters. The need for better communication was long overdue, and the COVID pandemic pushed it into high gear. Property managers have contacted clients about rent, payment plans, concessions, regulations, maintenance emergencies, and more. Clients have expressed their desire to continue this channel of instant communication indefinitely.

## More Services

Seeing how valuable property management is has made clients seek additional services from their property managers. Owners realized how tough collecting rent and leasing rental properties became during the pandemic, not to mention the ongoing changes to tenant-landlord legislation at a state and local level to remain in compliance with for their occupied properties.

Now they want to take advantage of these services and more. This situation has opened up a chance for property managers to expand their services. Some are already taking advantage of that by adding new services to their roster. They have specialized in evictions, cleaning, outdoor management, and more than your average rent collection and leasing units.

The growth in services means we might see more specialized property management firms. Firms specifically for single-family residential units or commercial multi-family units will become commonplace. That means owners will experience a more catered experience and more attention to their needs.

## The Importance of Technology

With the pandemic making life as we know it completely different, we had to find new ways to adapt to social distancing. The property management firms ahead of the curve regarding technology had the advantage.

Do you want to see the unit? Here is a virtual tour. The security guard isn't able to come in today? Don't worry since we have smart locks. So what if we have a hundred new clients to communicate with? Piece of cake with our CRM.

The trend of using software is projected to grow at an unprecedented rate in the future of property management. The growth is expected since the pandemic has catalyzed tech startups that specialize in property management solutions.

Property management firms have no choice but to grow and advance their use of technology to fulfill clients' demands and follow local regulations. Owners wish to see financial data on demand without going through the property manager all the time. They can do that with an owner portal.

Technology became essential when property management team members were suddenly forced to work from home. The integration of technology into the day-to-day

operations allowed property managers to operate their business throughout the pandemic. It also allows for the flexibility for remote working even after the pandemic dies down. This step is made possible with technological features like online payments, online property listings, electronic rent applications, online tenant interviews, resident portals, online leasing, and virtual property tours.

Not only are these advances making the job easier for property managers, but prospective and current tenants also enjoying the benefits of the technology. Everything from virtual tours to submitting a rental application and paying rent can now be done with the click of a button. New tenants love the option of virtual tours and leasing.

## Creative Ways to Earn More

Property managers are looking at more creative ways to increase their incomes. Some property managers are hesitant to become responsible for more properties under the current economic circumstances. At the same time, owners are reluctant to buy more properties.

With this sort of standstill, property managers have opted to figure out more ways to make money creatively such as acquiring portfolios from retiring managers.