INTRODUCTION

1.1 OVERVIEW

A property manager's role is far more complex than simply showing space, signing leases, and collecting rents. Property management, as an area of specialization within the real estate industry, has emerged as a managerial science. So I 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 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

A Property Management system (PMS) is software used in hospitality to control, organize, and executive operations and day-to-day activities of a hotel or vacation rental property.

Special purpose: Theaters, Schools and Universities, Places of worship extra. Single-family Residences, Multi-family

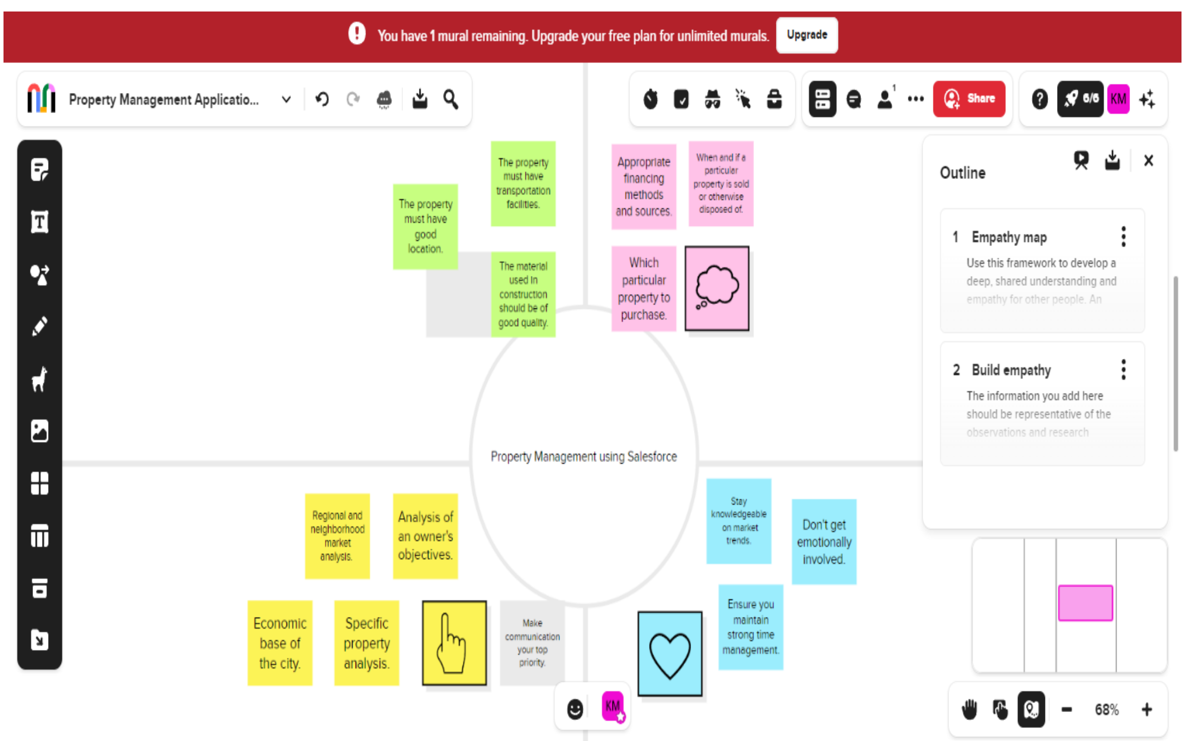
Residence, Town houses, Apartments this is the Residential uses of Property Management.

Commercial: Public Accommodations, Retail Property, Office Property and Co-working Spaces.

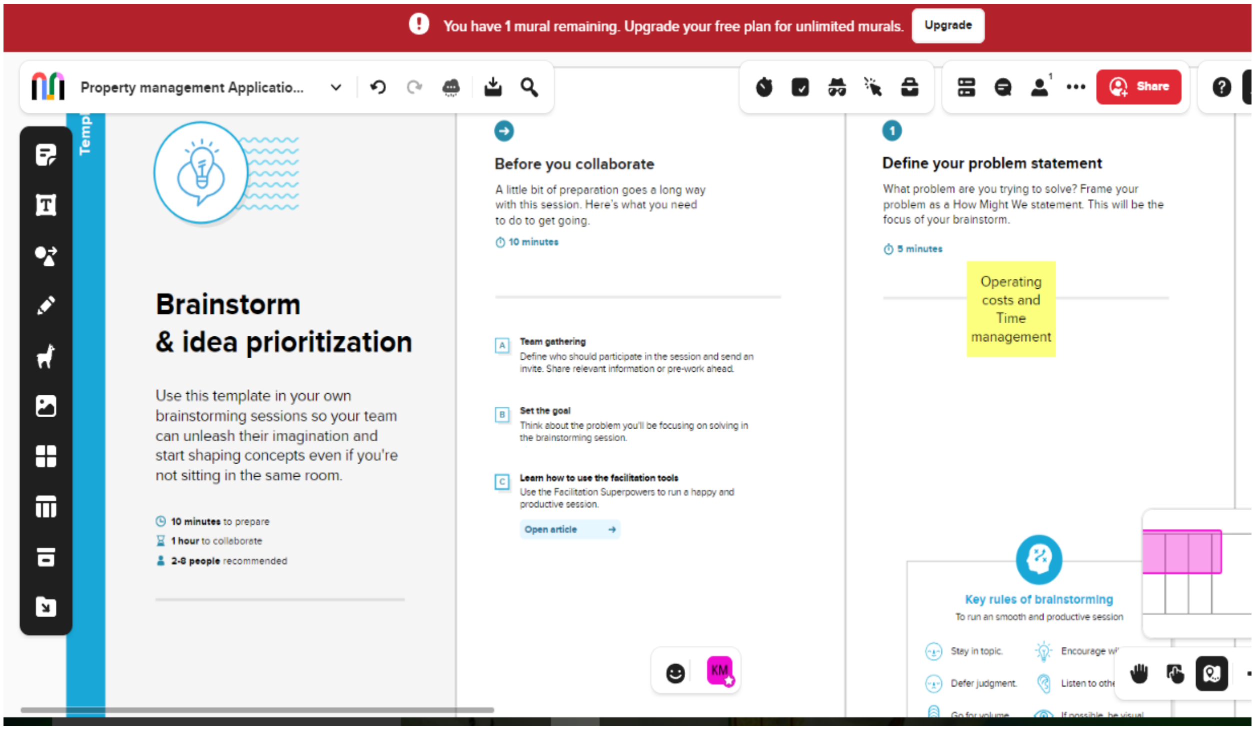
Industrial: Warehouses, Light Manufacturing (Food Packaging), Heavy Manufacturing (Automatic, Factories, Steel mill).

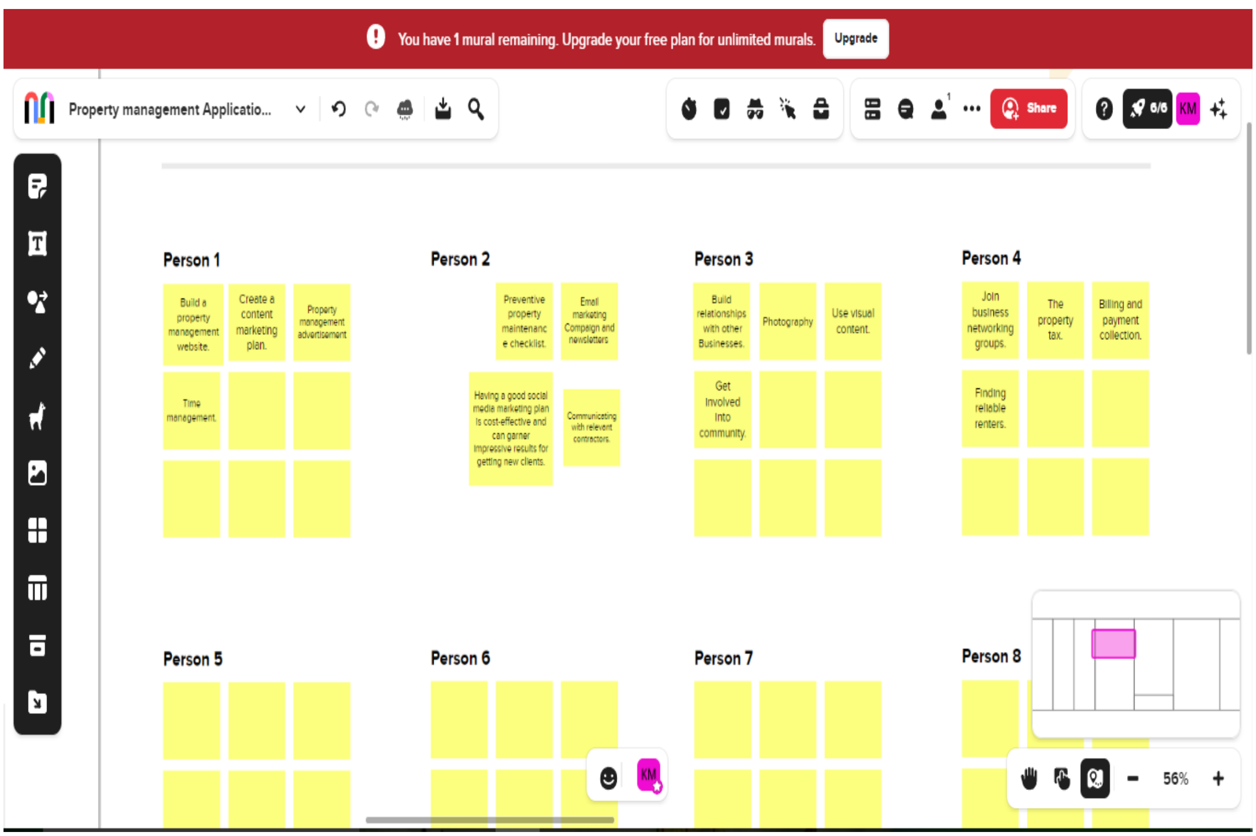
PROBLEM DEFINITION AND DESIGN THINKING

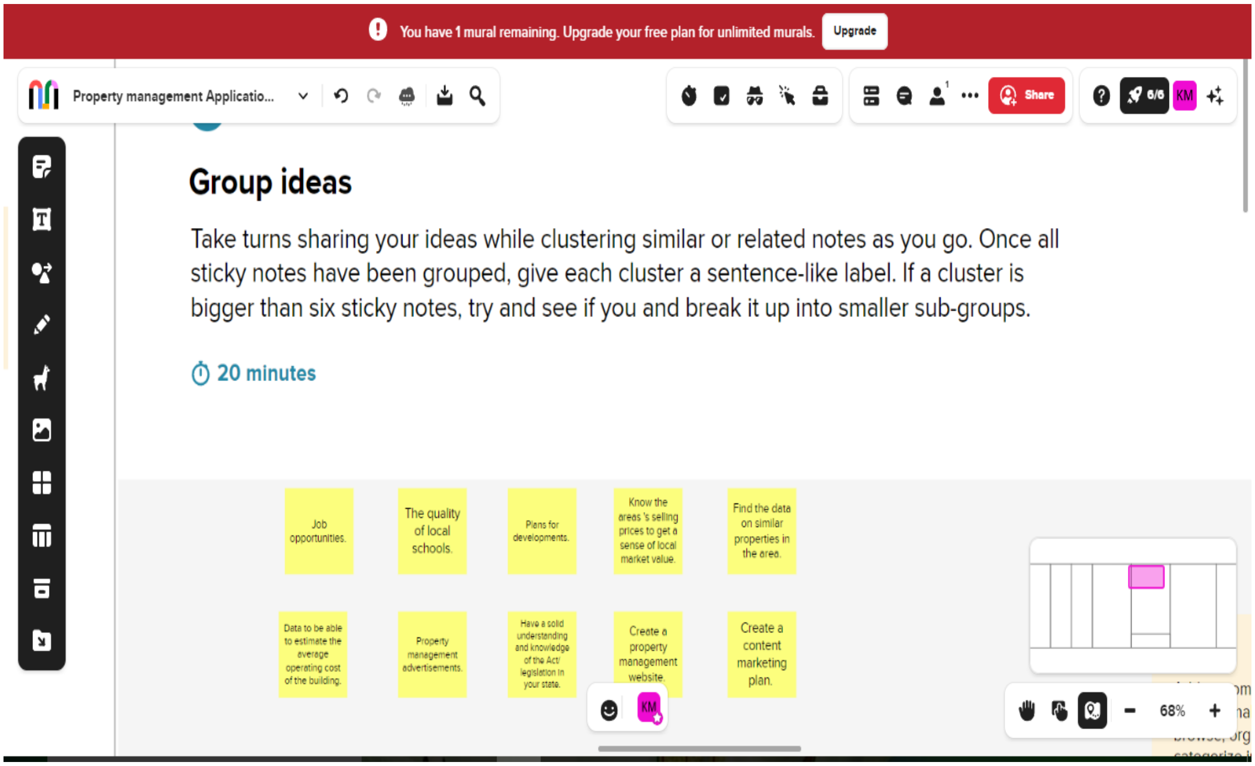
2.1 EMPATHY MAP

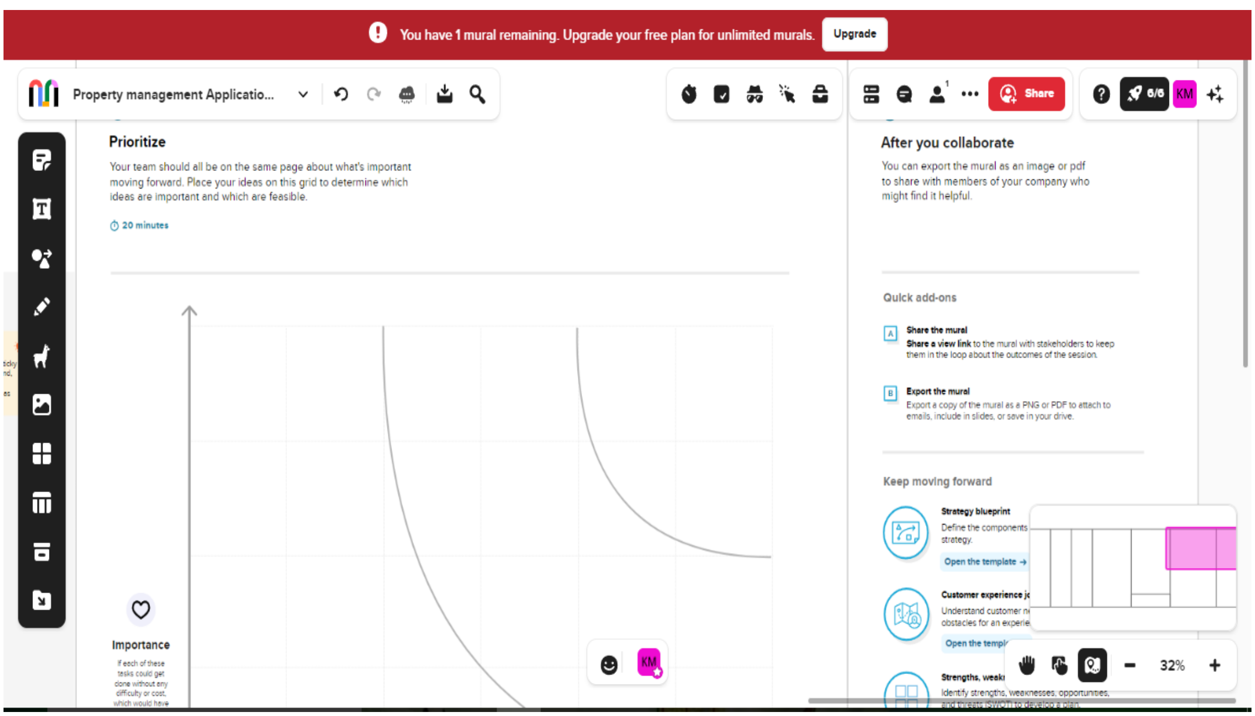


2.2 IDEATION AND BRAIN STORMING MAP






You have 1 mural remaining. Upgrade your free plan for unlimited murals.
Upgrade
Property management Applicatio...
Share
KM
Group ideas
Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you and break it up into smaller sub-groups.
20 minutes
Job opportunities.
The quality of local schools.
Plans for developments.
Know the areas 's selling prices to get a sense of local market value.
Find the data on similar properties in the area.
Data to be able to estimate the average operating cost of the building.
Property management advertisements.
Have a solid understanding and knowledge of the Act/ legislation in your state.
Create a property management website.
Create a content marketing plan.
68%


You have 1 mural remaining. Upgrade your free plan for unlimited murals.
Upgrade
Property management Applicatio...
Share
KM
Prioritize
Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.
20 minutes
Importance
After you collaborate
You can export the mural as an image or pdf to share with members of your company who might find it helpful.
Quick add-ons
Share the mural
Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.
Export the mural
Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.
Keep moving forward
Strategy blueprint
Open the template →
32%

RESULT

3.1 DATA MODEL

<table>
<tr><th>Object name</th><th>Fields in the object</th></tr>
<tr><td>Rent</td><td><table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Rent</td><td>Auto Number</td></tr><tr><td>BHK type</td><td>Picklist</td></tr></table></td></tr>
<tr><td>Loan</td><td><table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Interest Rate</td><td>Currency</td></tr><tr><td>Loan Amount</td><td>Formula</td></tr></table></td></tr>
</table>

3.2 ACTIVITY AND SCREENSHOT

Milestone 1-Salesforce

Activity 1:

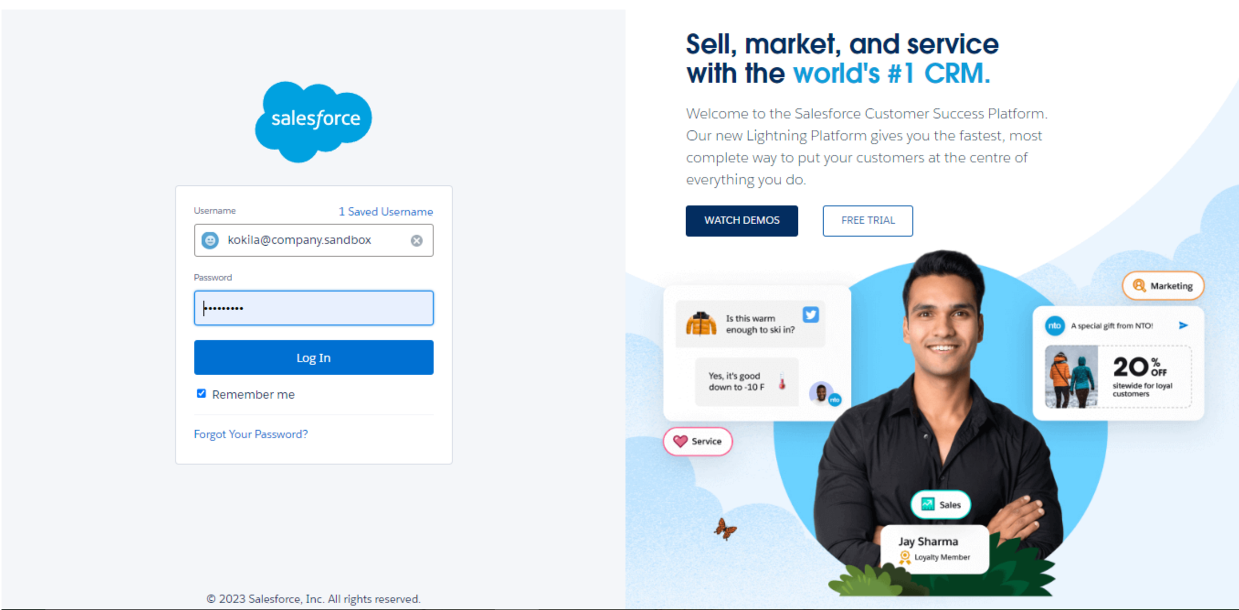
Creating Developer Account

1. ***Go to developers.salesforce.com.***
2. ***Click on sign up.***
3. ***On the sign up form, enter the details.***
4. ***Next Click on sign up after filling the details.***

Activity 2:

Account Activation

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



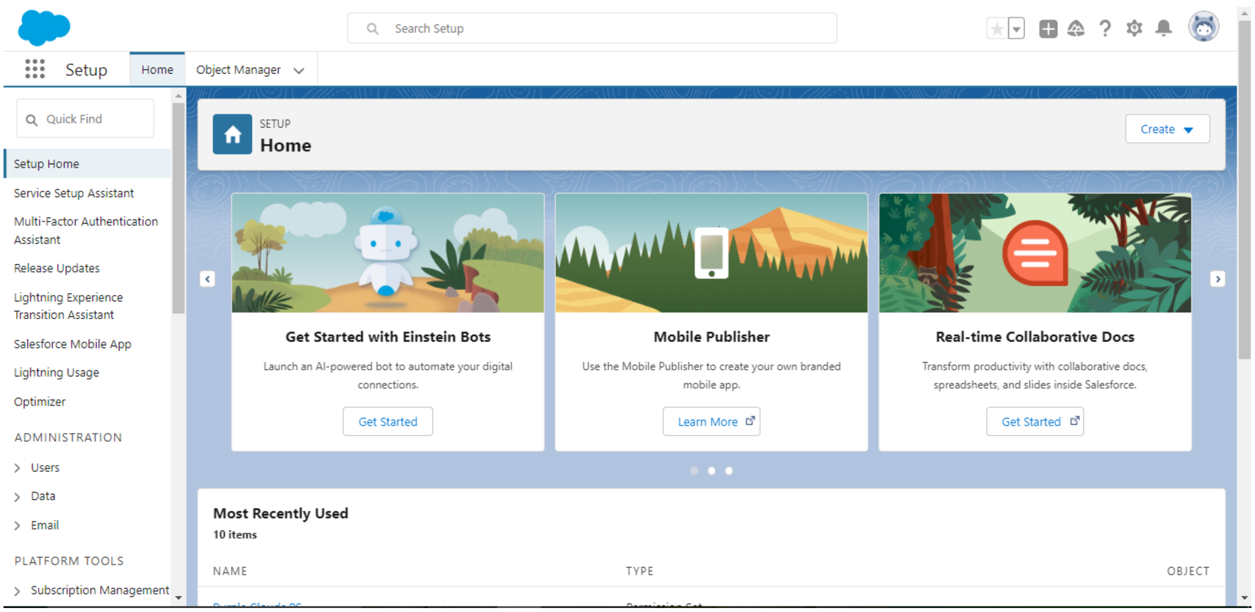
2. Login to Your Salesforce Account.

<u>Milestone 2-Object</u>

Activity 1:

Objects- To Navigate to setup page:

1. Click on gear icon □ Click setup.



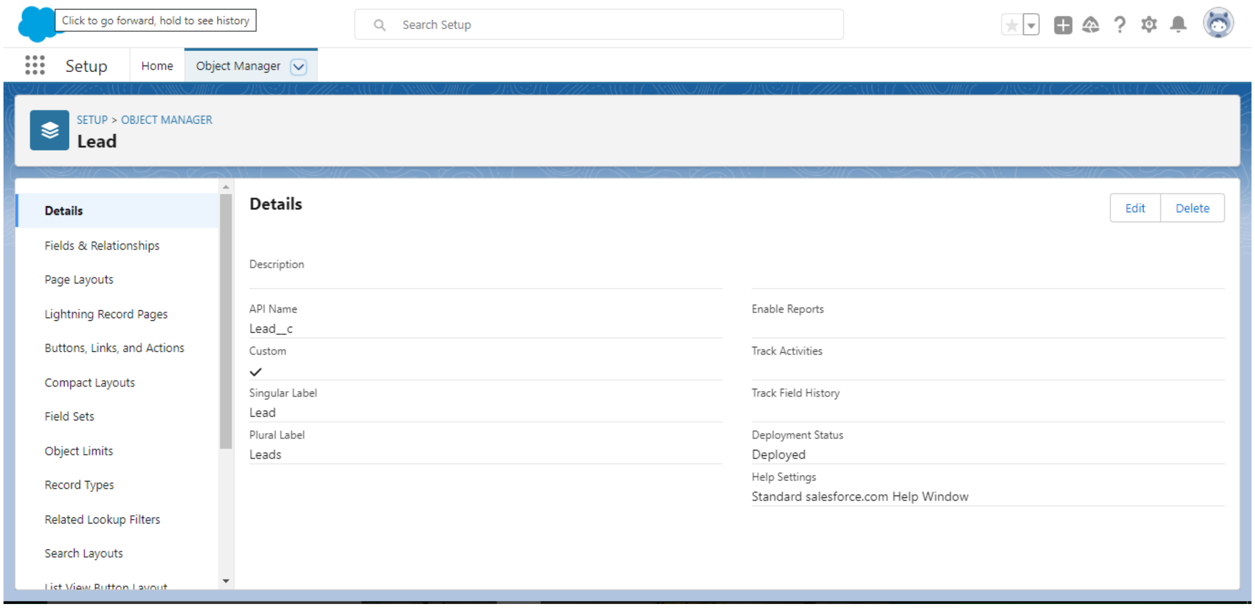
To create an object:

1. From the setup page □ Click on Object Manager □ Click on Create □ Click on Custom Object.

On custom object defining page:

2. Enter the label name, plural name, click on Allow reports, Allow search -> Next Click on Save.

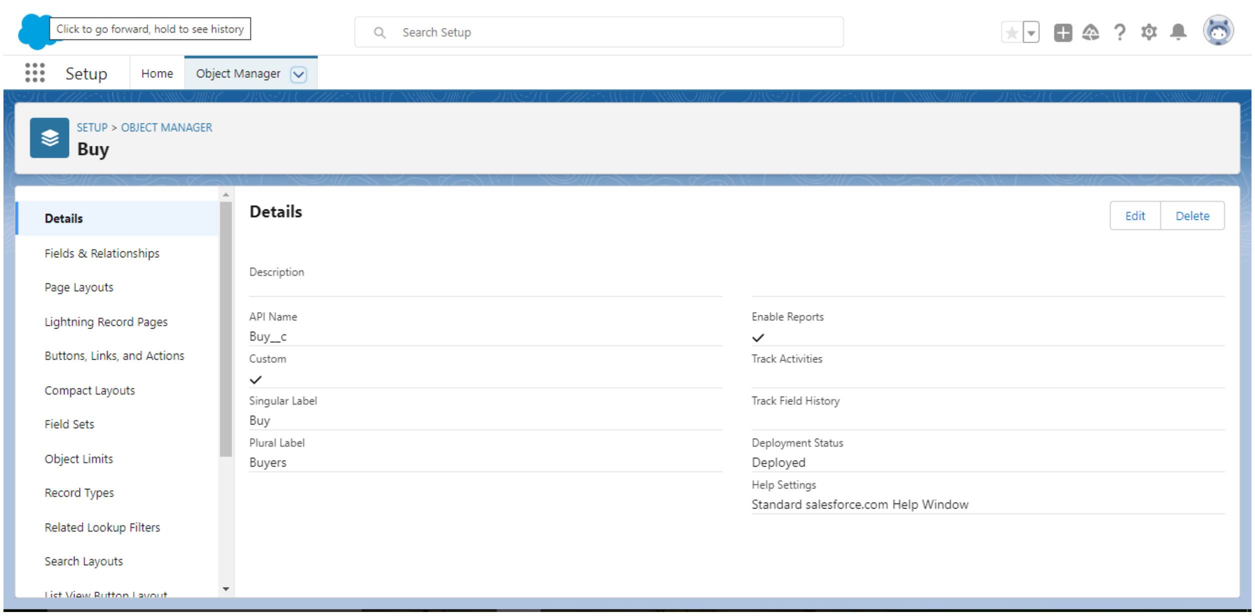
Create Object Lead



Activity 2:

Create Object Buy

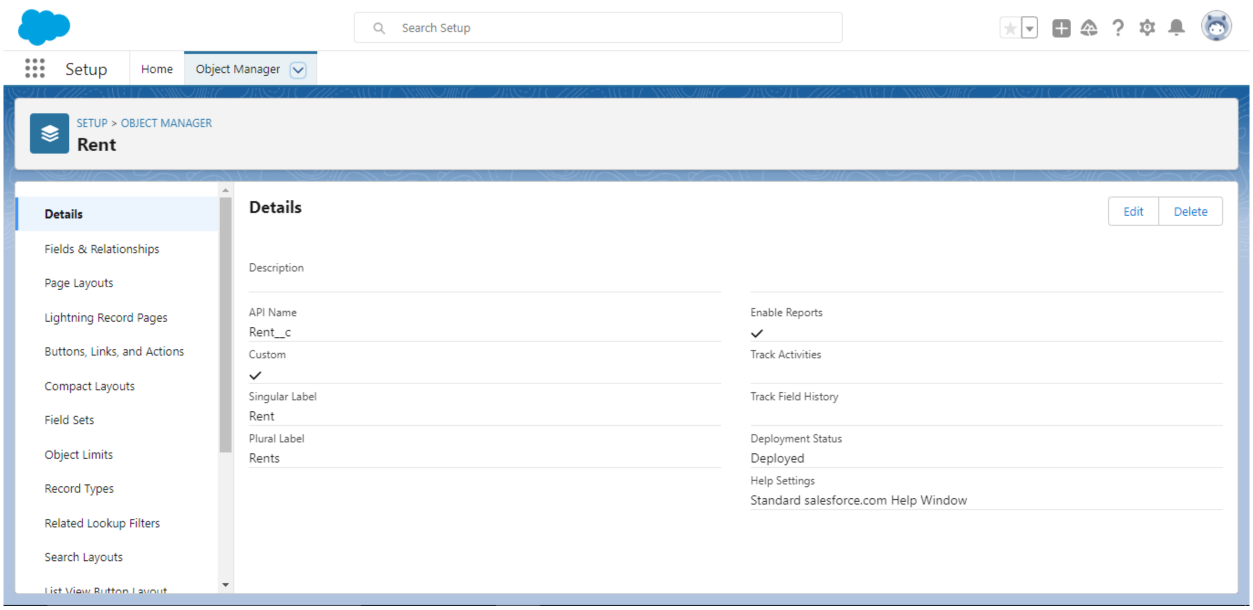
Follow the similar steps to create the object Buy.



Activity 3:

Create Object Rent

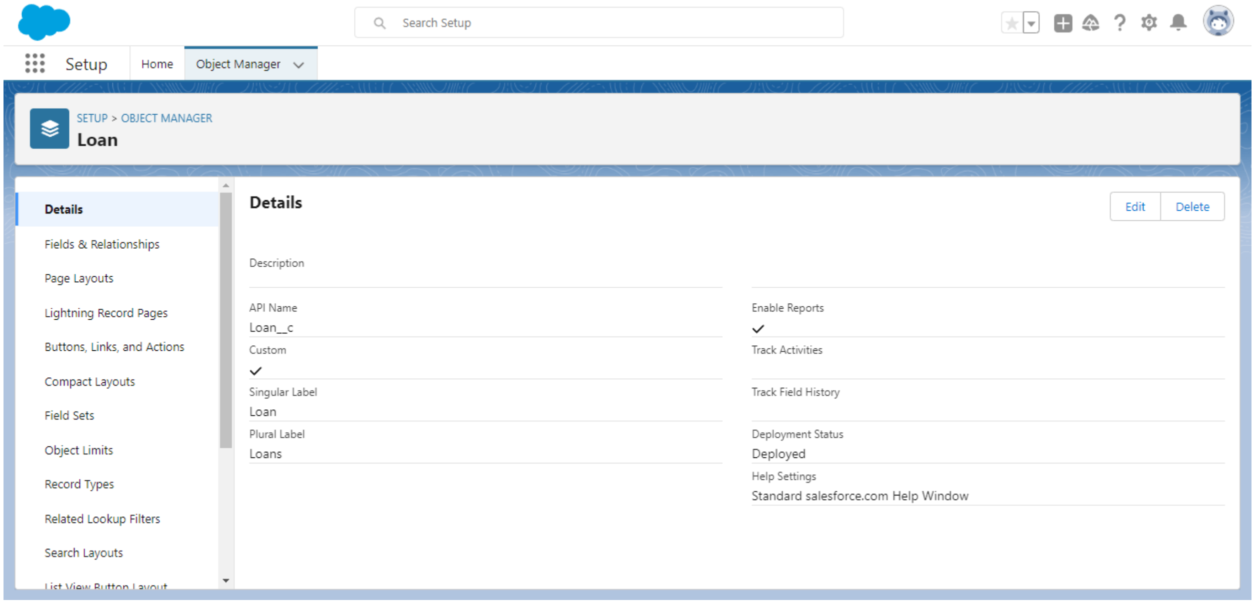
Follow the similar procedure to create the object Rent.



Activity 4:

Create Object Loan

Follow the similar procedure to create the object Loan.



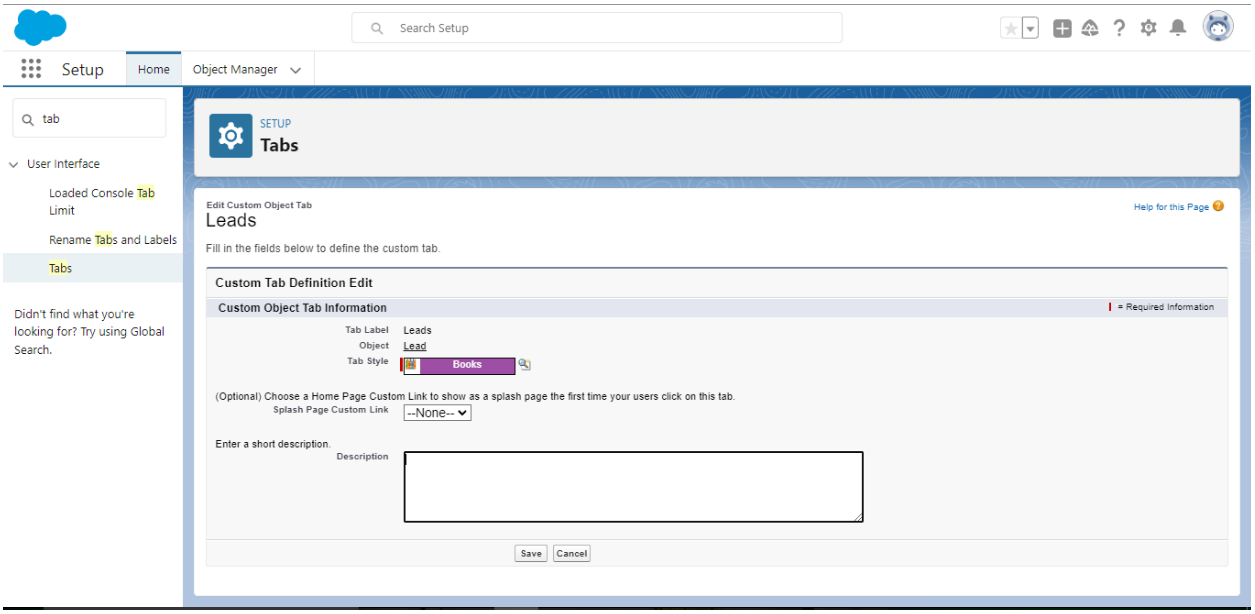
<u>Milestone 3-Tab</u>

Activity 1:

Create the Lightning Tab

To Create a Tab: (Lead)

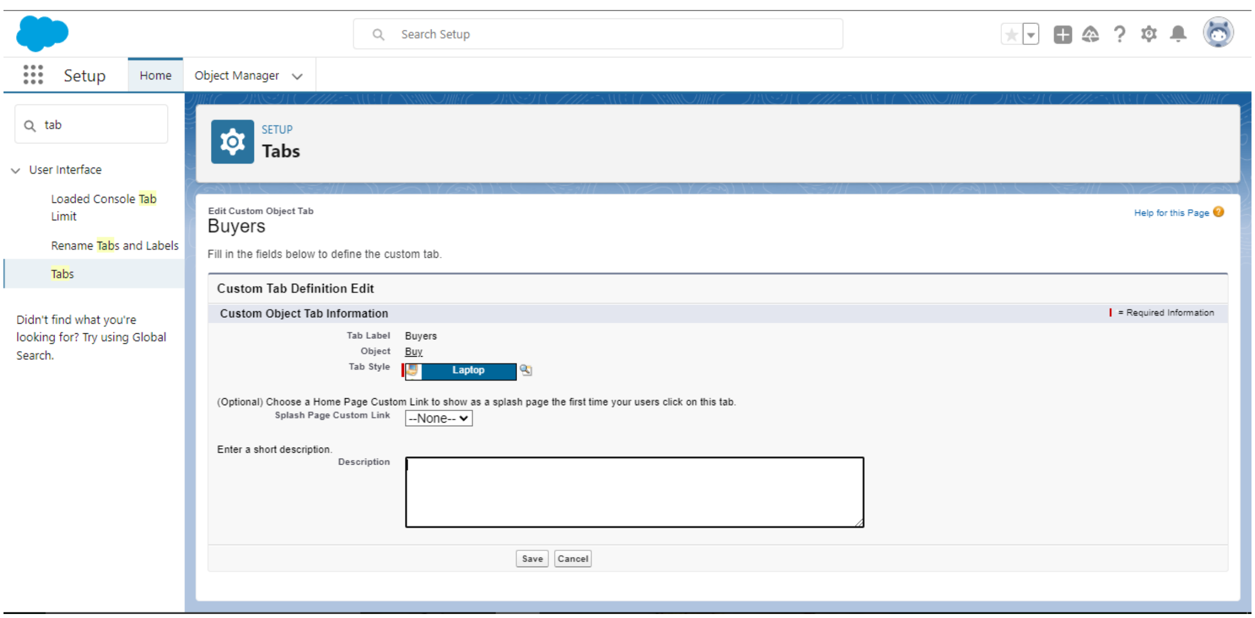
1. ***Go to setup page -> type Tabs in Quick Find bar -> click on tabs -> New (under custom object tab).***
2. ***Select Object (Lead) -> Select the tab style -> Next (Add to profile page) keep it as default -> Next (Add to Custom App)keep it as default -> click on Save.***



Activity 2:

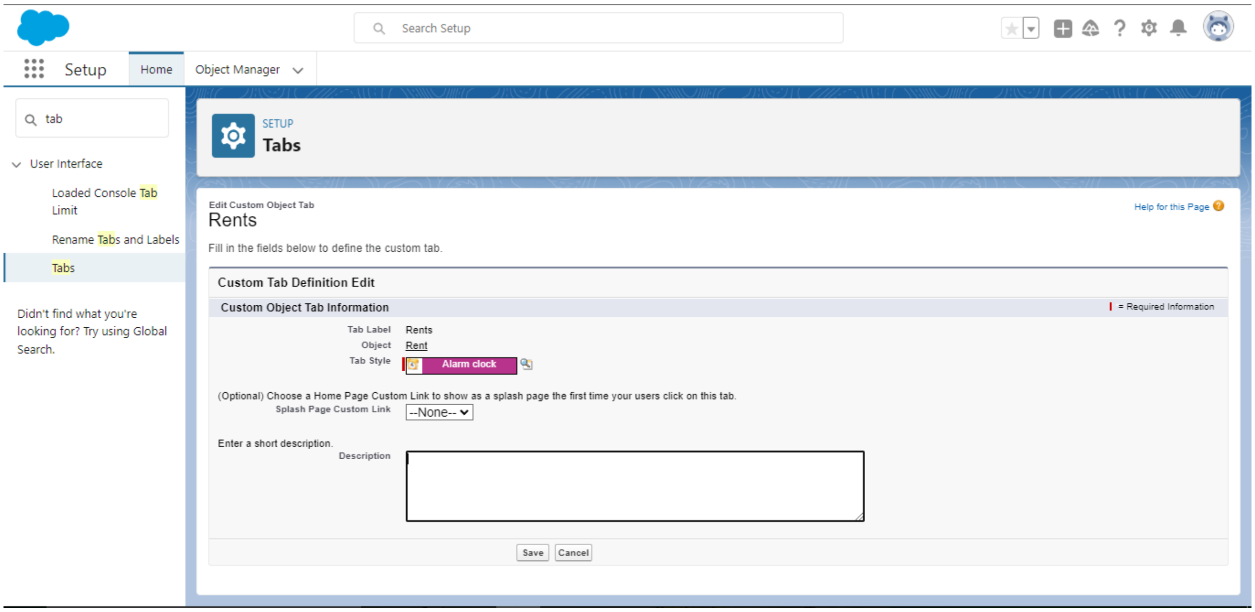
To create a Tab: (Buy)

Same procedure to create a tab Buy.



Activity 3:

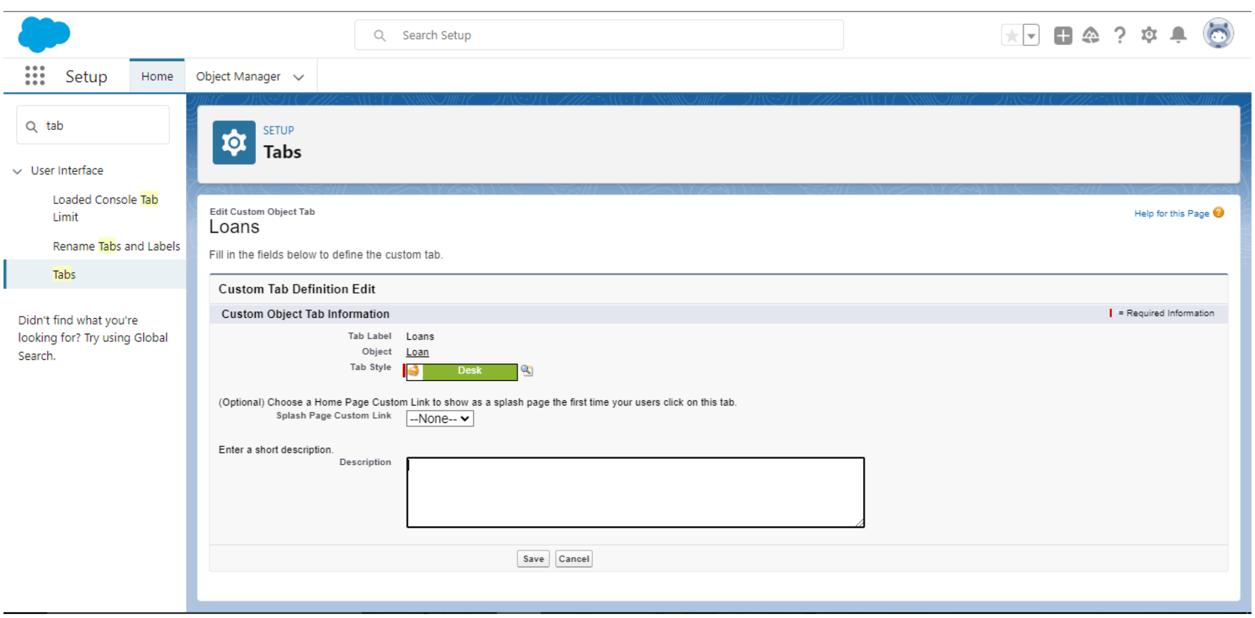
To create a Tab: (Rent)



Follow the similar steps to create the tab Rent. Then Save it.

Activity 4:

To create a Tab: (Loan)

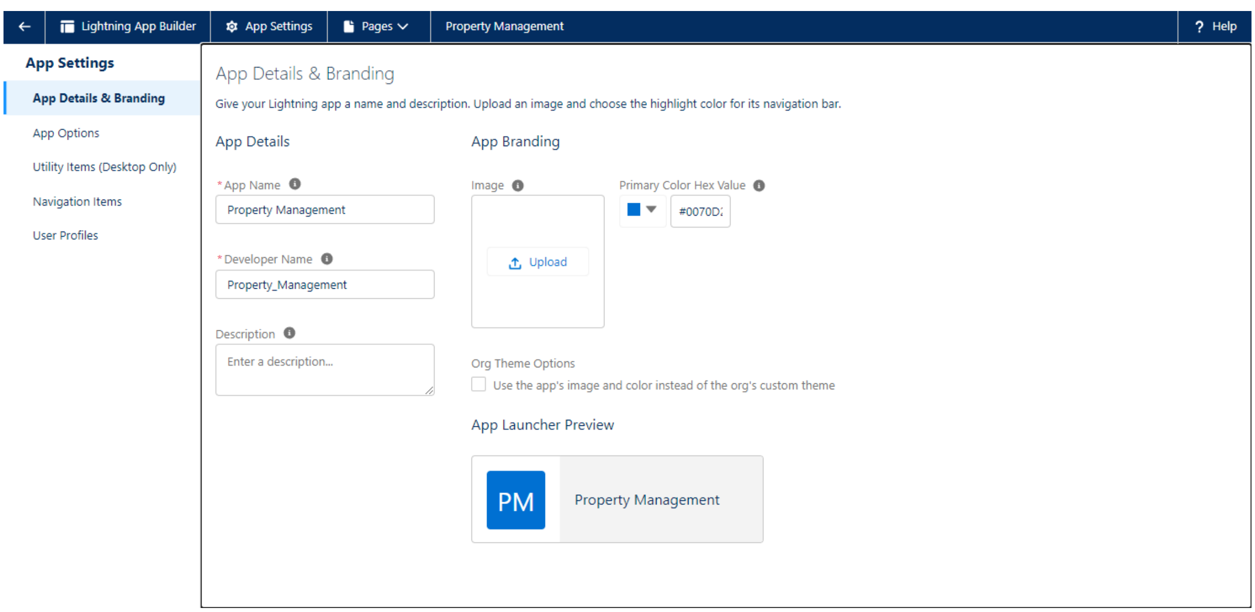


Milestone 4-The Lightning App

Activity 1:

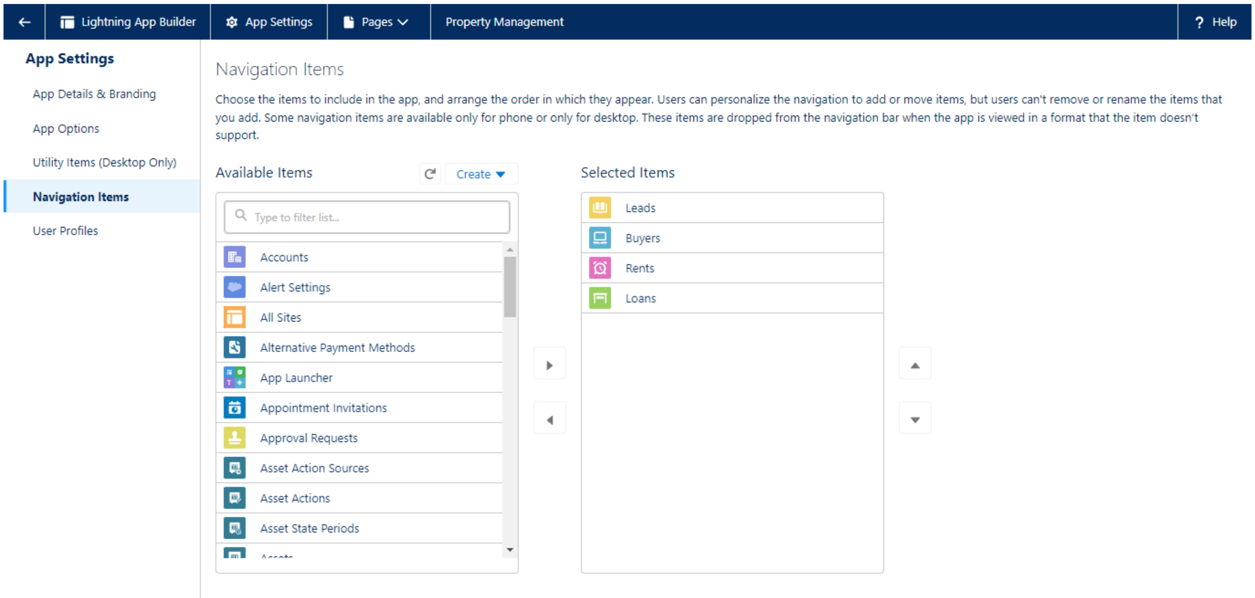
Create the Lightning App

1. ***Go to setup page -> In quick find search "app manager" -> Select app manager -> click on new lightning app.***
2. ***Type the app name as Property Management in app details and branding -> Next -> (App option page) keep it as default -> Next.***
3. ***(Utility Items) keep it as default -> Next -> Add Navigation Items (Lead, Buy, Rent, Loan) -> Next -> Add User Profiles (Add System Administrator, Salesforce platform user, Standard User) -> Next.***



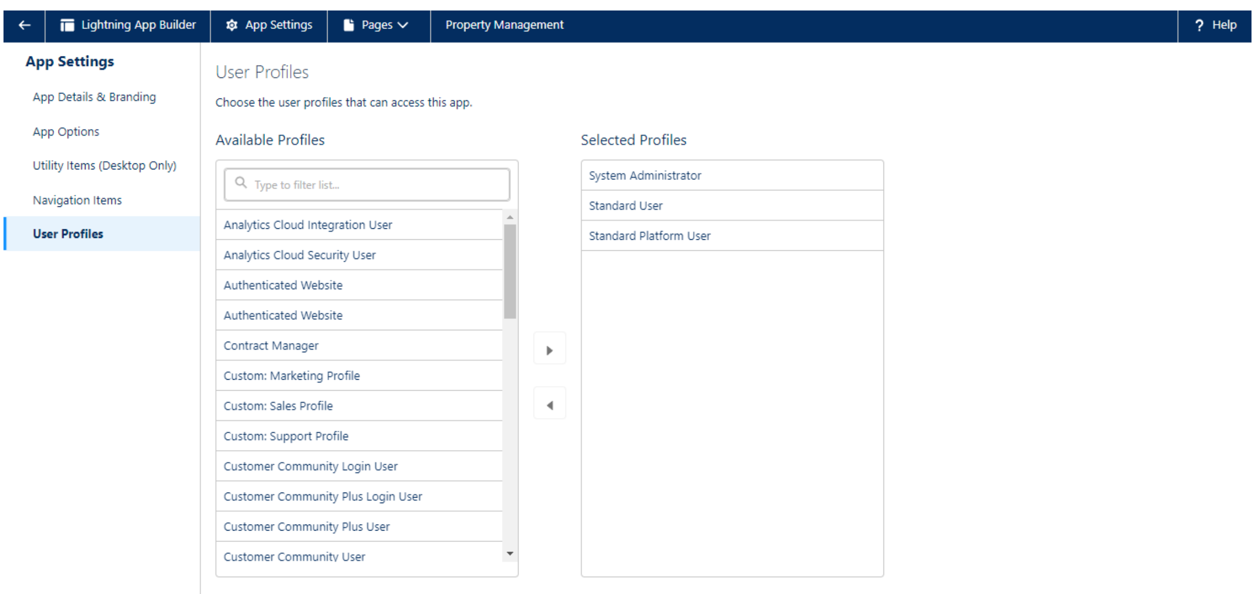
4. ***To Add Navigation Items:***

Select the items from the search bar and move it using the arrow button -> Next.

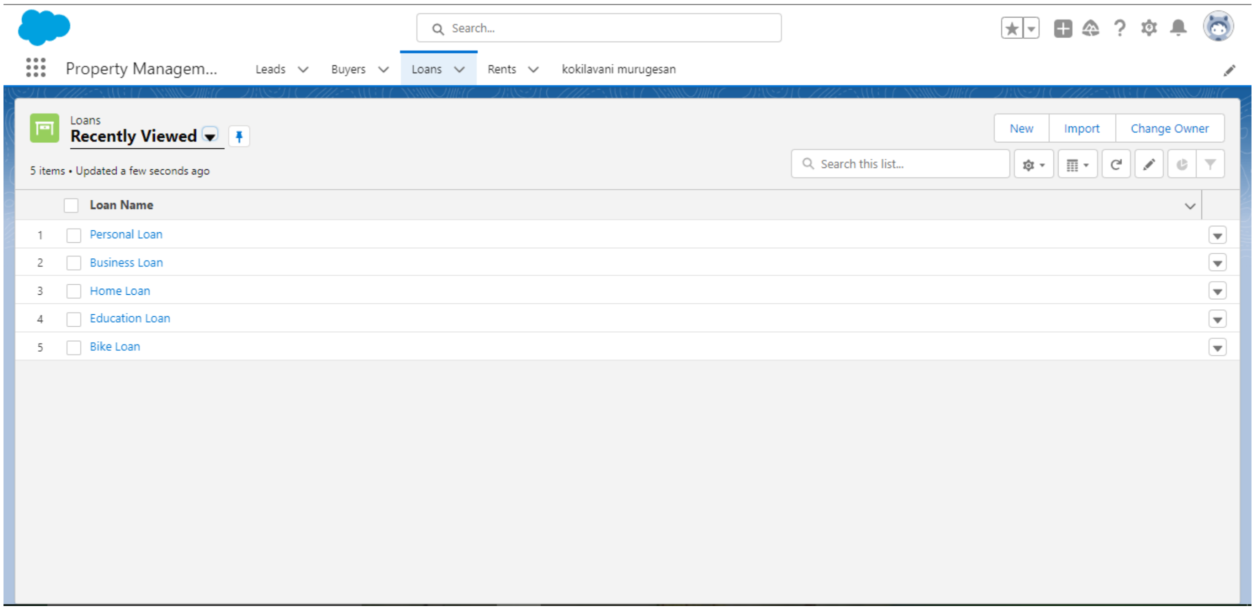


5. To Add User Profiles:

6. Search profiles in search bar -> click on the arrow button -> Save & finish.



Then go to the app launcher search the app Property Management as shown below.

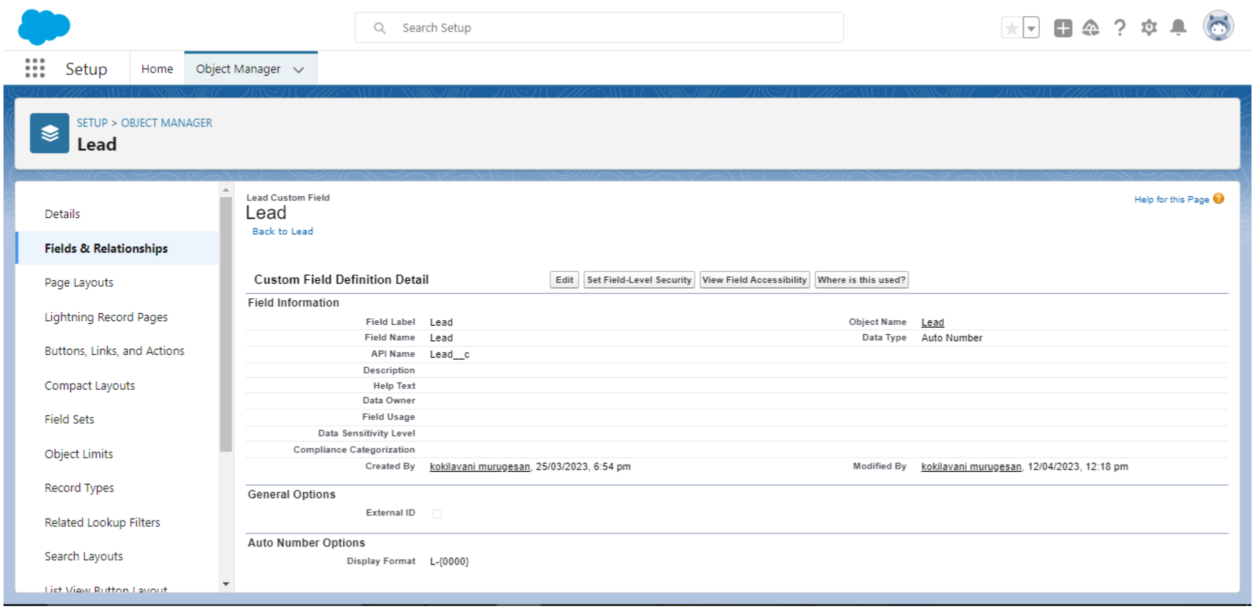


Milestone 5-Fields

Activity 1:

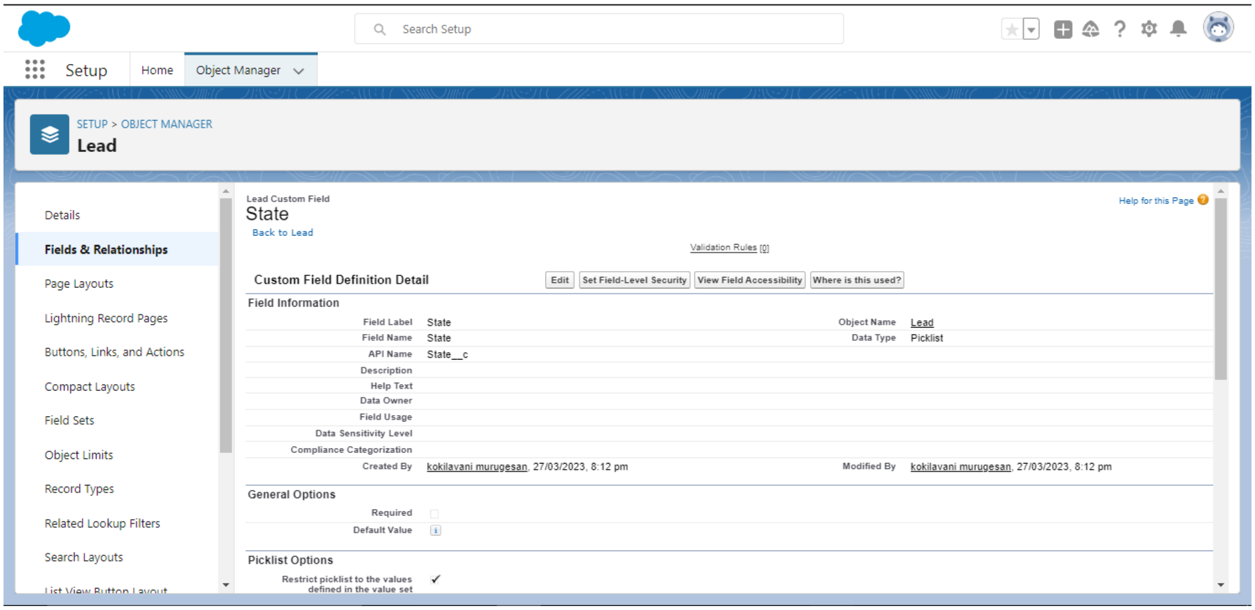
❖ ***Create the Lead Field***

1. ***Go to setup page -> Click on object manager -> Select the object lead.***
2. ***Now click on Fields & Relationships -> Click New.***
3. ***Choose the field data type as Auto Number -> Next -> Fill the field label name Lead, format L-{0000} -> Next.***
4. ***Keep it us default click Next□ And then Save.***



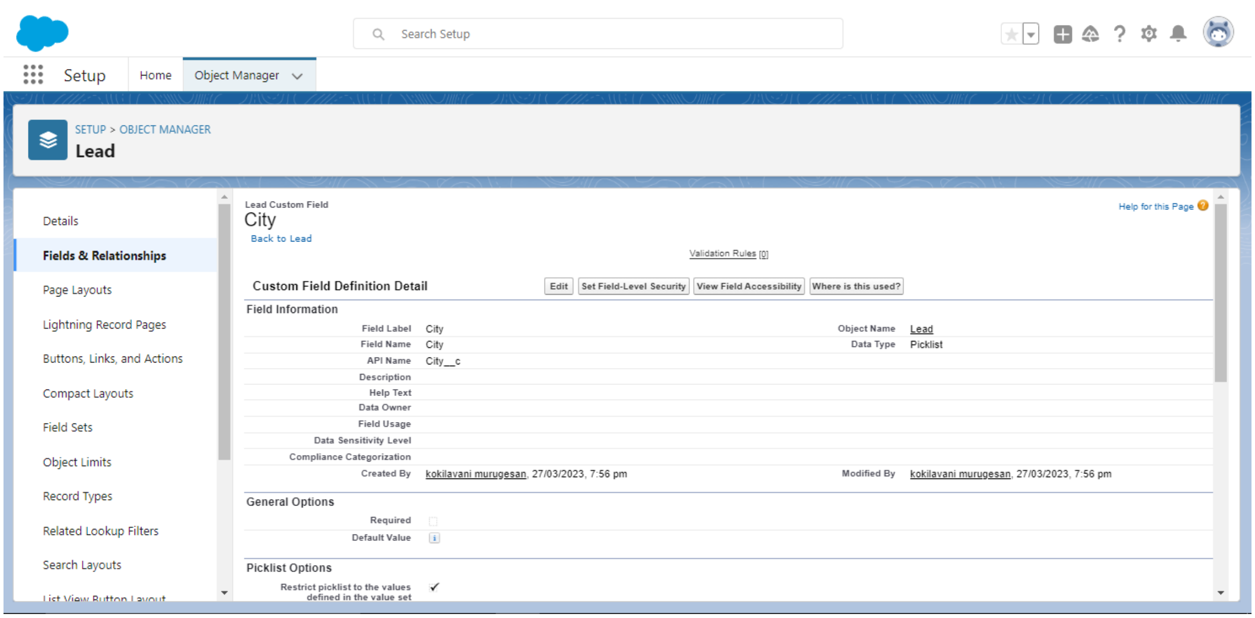
❖ ***Create the state field:***

1. ***Above (1), (2) procedures are Repeat -> Give the Data type as Picklist (Maharashtra, Telangana, Gujarat, Tamil Nadu) (Field Dependency).***
2. ***Then Next -> No changes Click Next Save.***

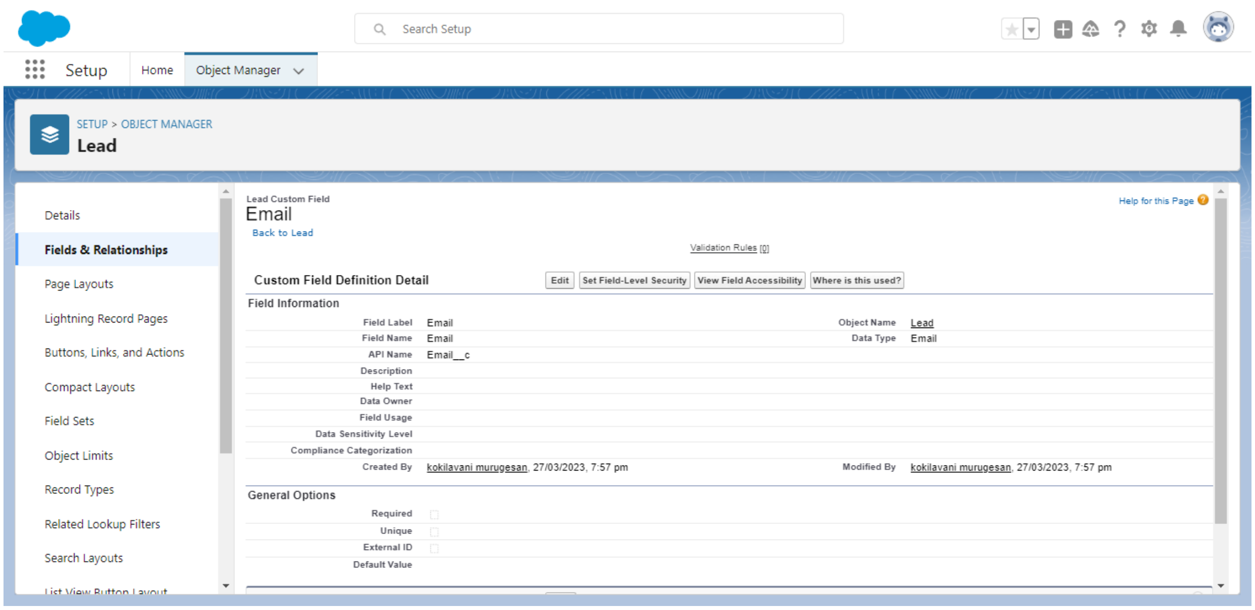


❖ ***To Create the City Field:***

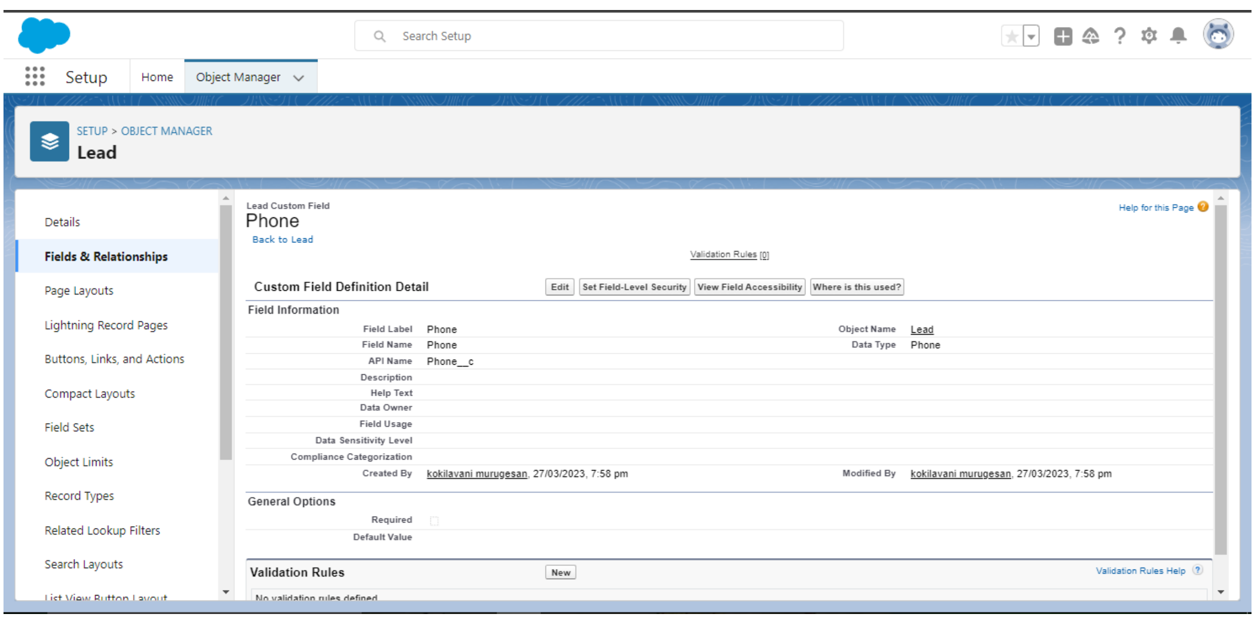
1. ***Give the Data type as Picklist (Mumbai, Pune, Nashik, Hyderabad, Surat, Ahemdabad) (Field Dependency).***
2. ***Save.***



- ❖ ***Email: Create the Email Select the data Type as Email, then save it.***

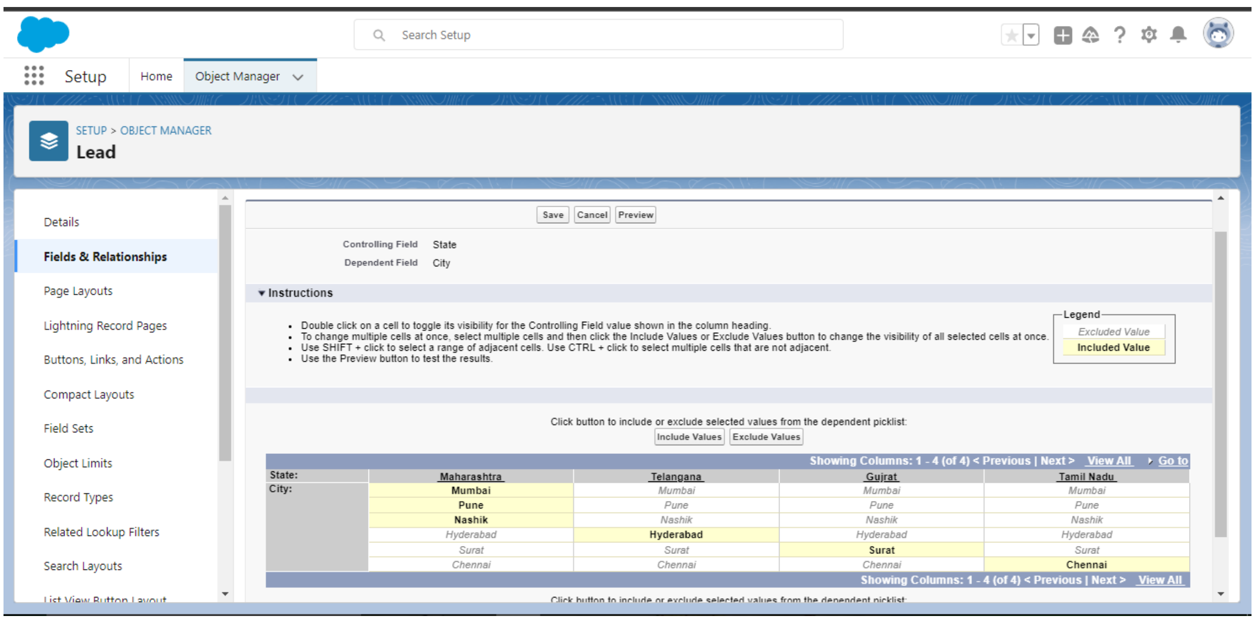


- ❖ ***Phone: Select the Data type as Phone and then save it.***



- ❖ ***In the Field and Relationship go to the Field Dependencies***

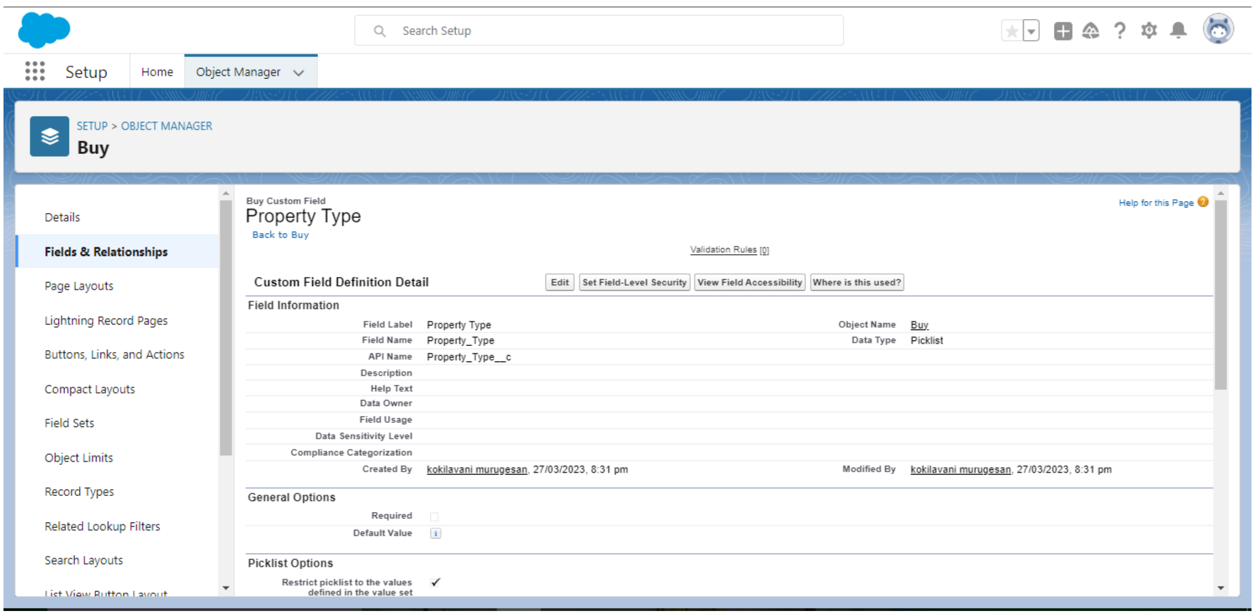
1. *Go to new Field Dependency -> Give the value of controlling Field is State -> And Dependent Field is City -> Next you can include the Values.*



Activity 2: For Object Buy

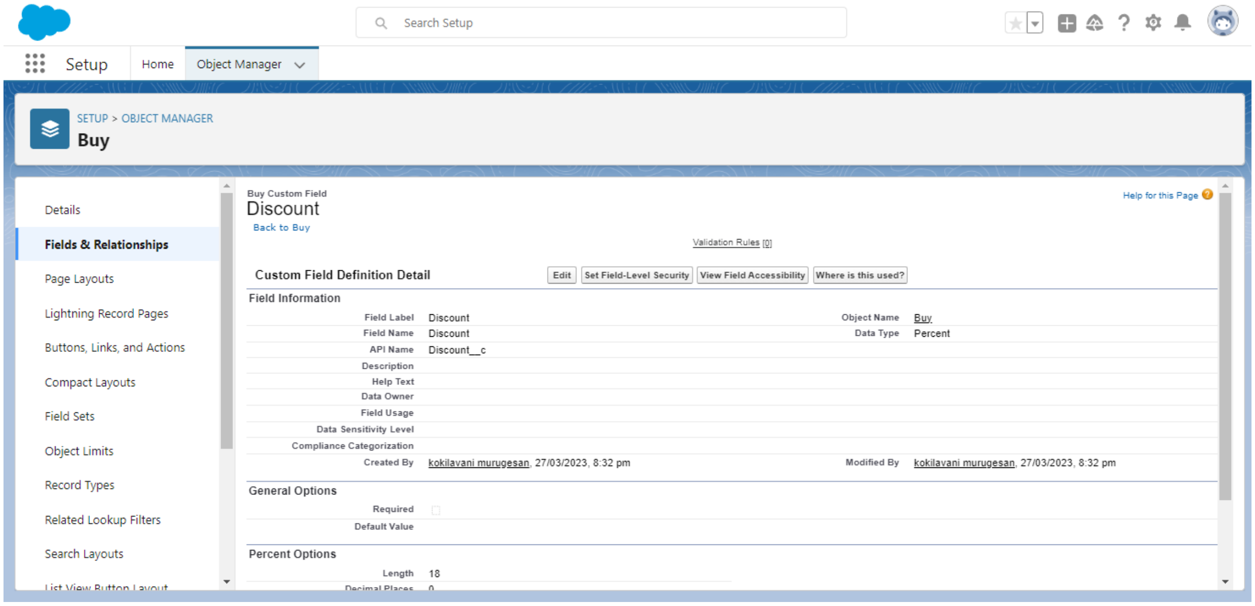
- ***Create Field for buy***
- ***Create Property Type***

   1. *Go to the Object Manager -> Click the Object Buy -> Go to the Field & Relationship -> Click New -> Give the Field Data type as Picklist (Residential, commercial, Industrial) -> 2time give next -> Save.*



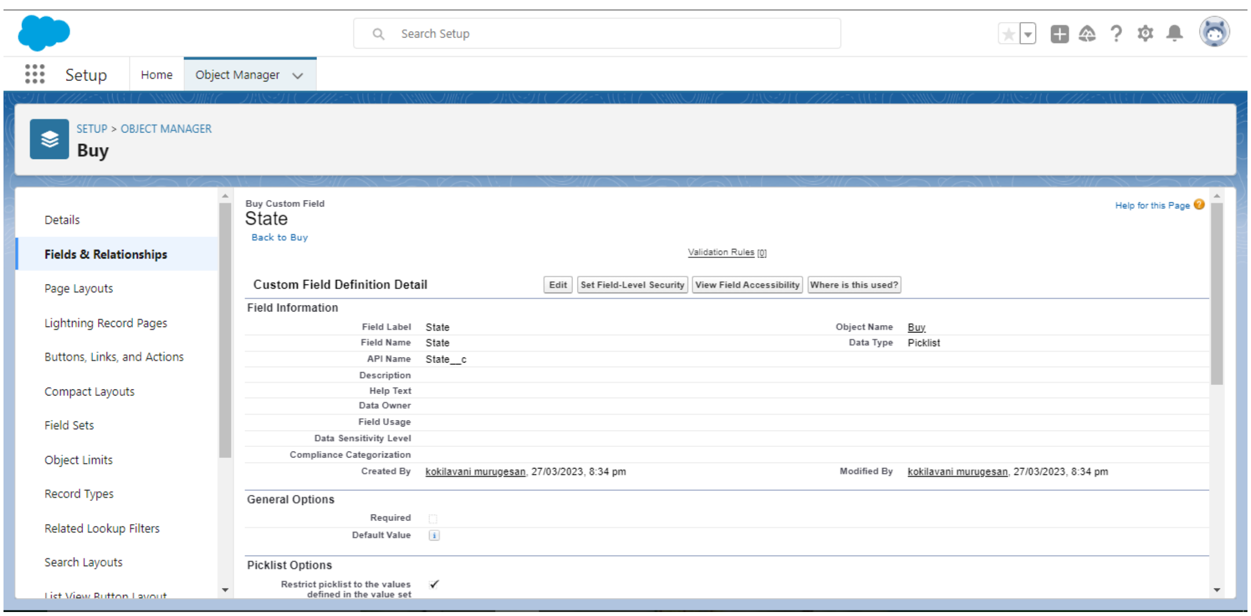
❖ ***Discount***

Repeat the same procedure, give percentage as the Data type -> Field label Name is Discount -> Next -> Save.

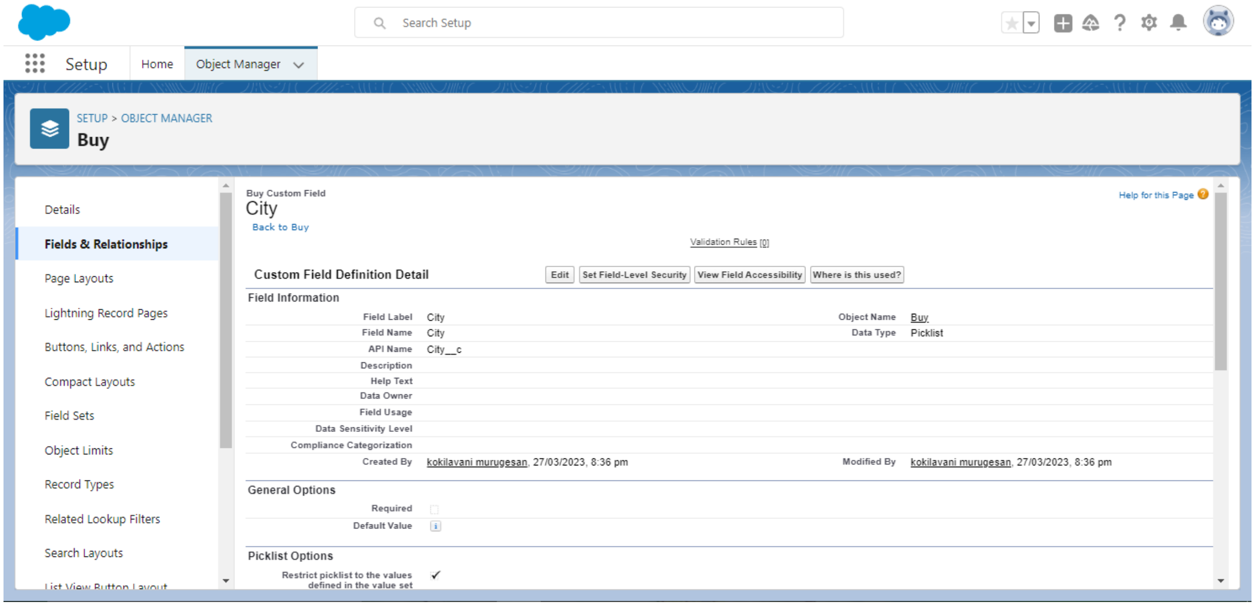


❖ ***State***

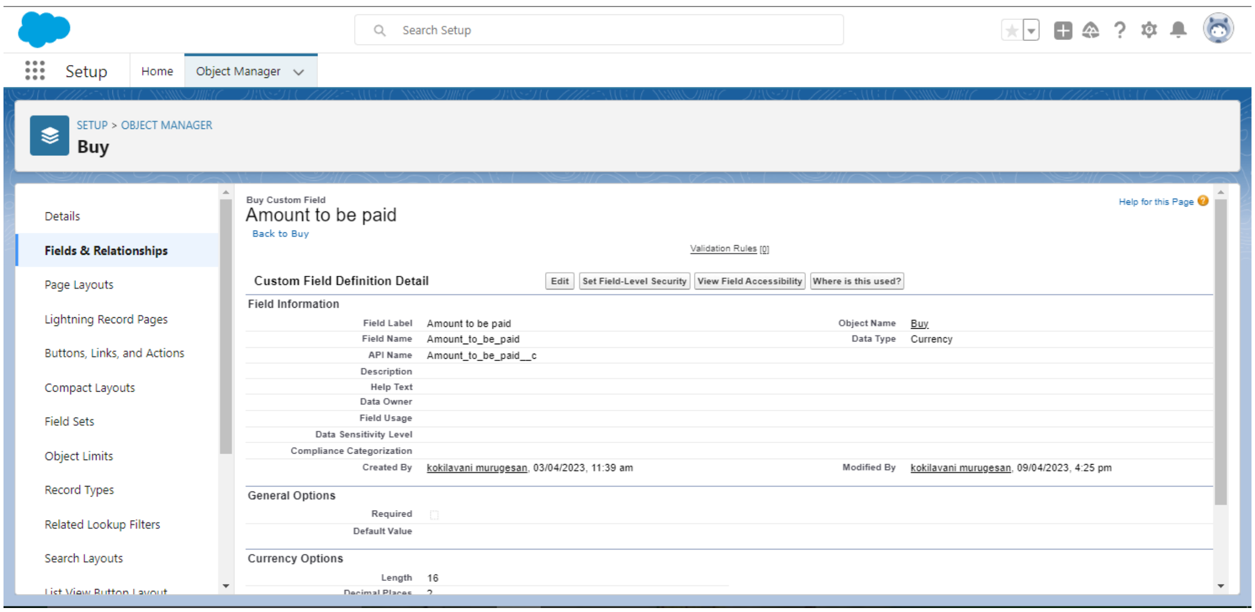
Give the Data type as Picklist, label Name is State then add the values (Maharashtra, Telangana, Gujarat, Tamil Nadu) Field Dependency -> Next -> Save.



❖ ***City: Activity (1) as same as the procedure***



❖ *Annual Amount to Be Paid:*

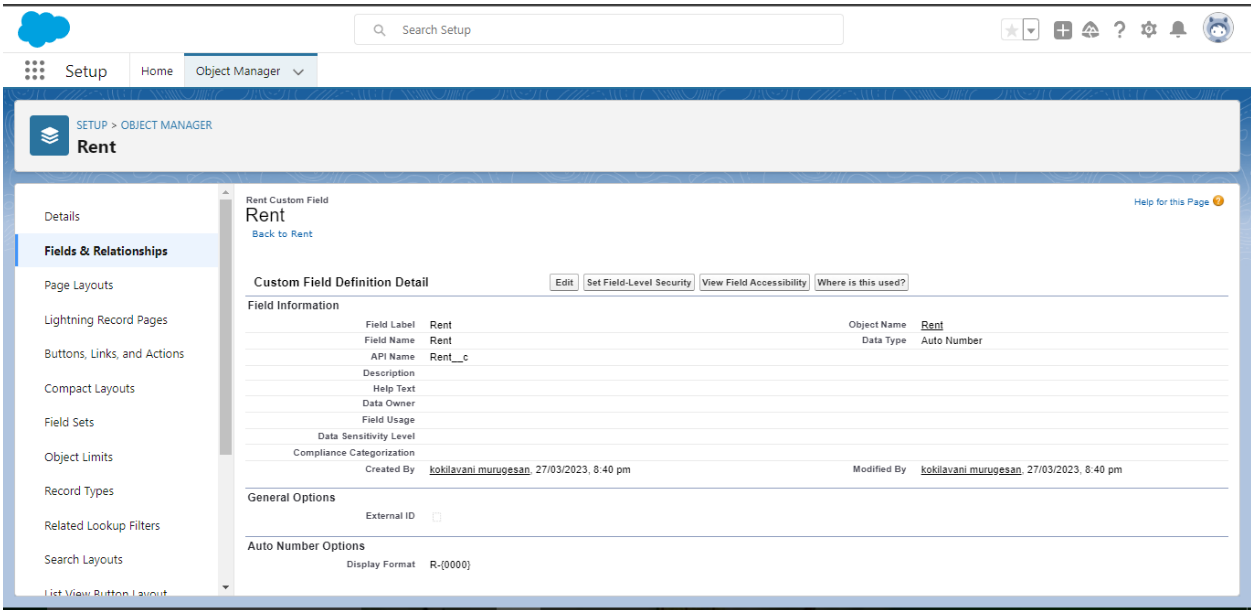


Activity 3:

Create Field for Rent

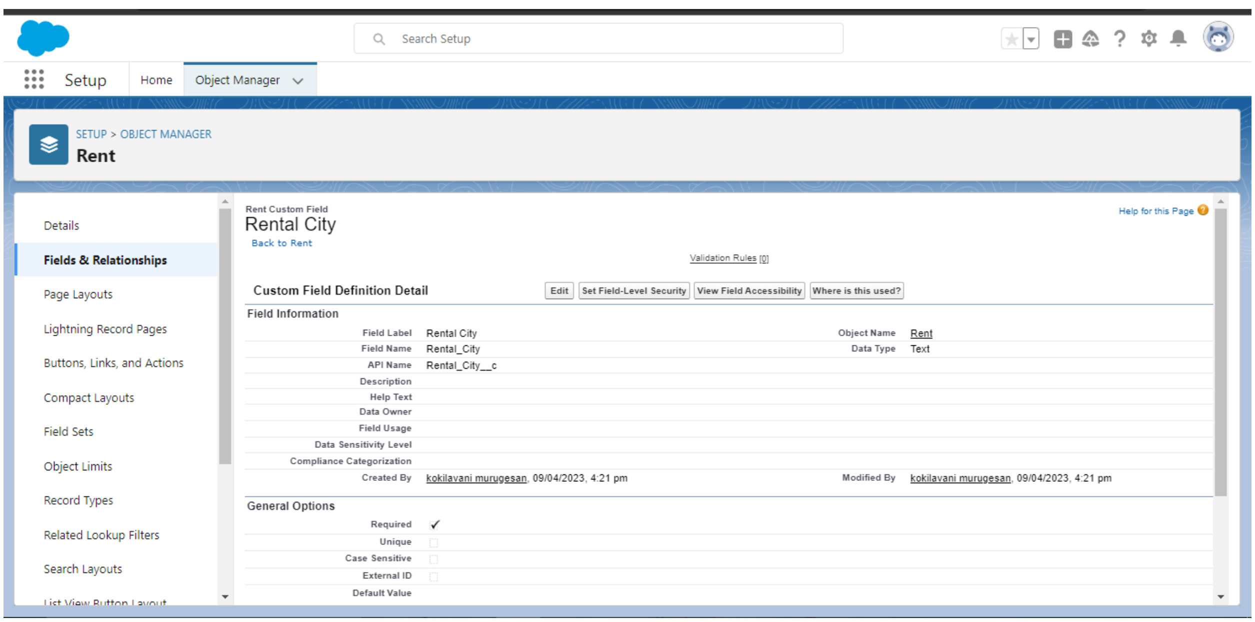
❖ *Rent*

1. ***Go to the Object rent -> click Field & Dependency -> New -> Data type is Auto Number, label name is Rent and field format is R- {0000} -> Next -> Save.***



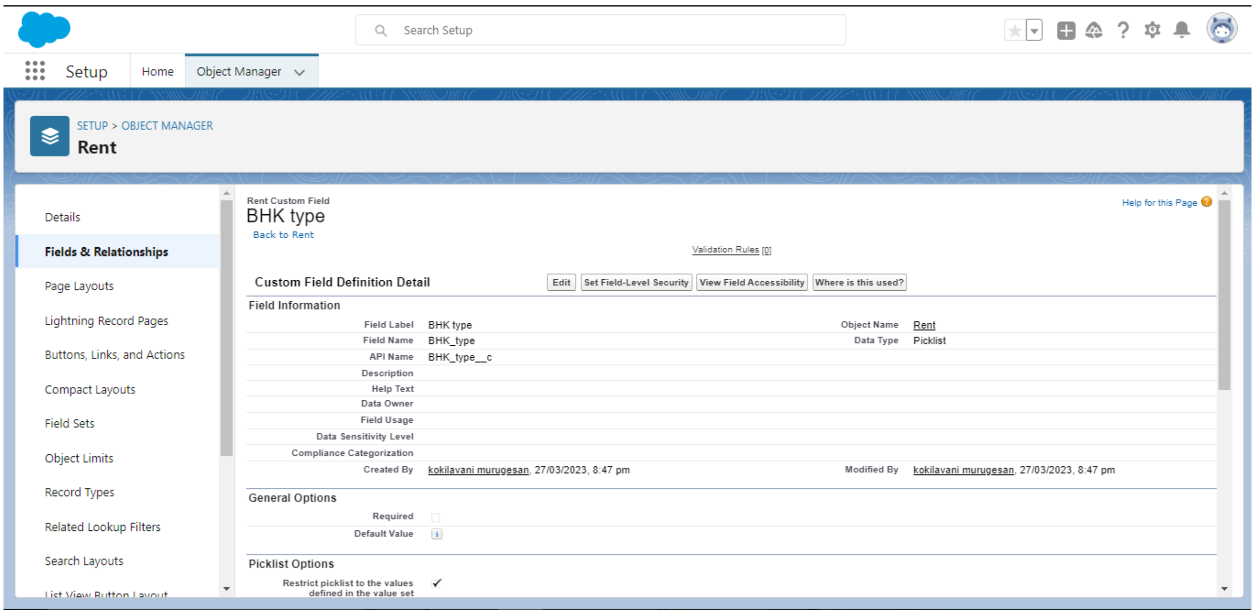
- ***Rental City***

1. ***Select the Text as the Field Data Name (Any City).***



❖ ***BHK Type:***

1. ***Choose the Data Type as Picklist (1BHK, 2BHK, 3BHK). Given the label name as BHK type -> Next -> Save it.***



Activity 4:

Create Field for Loan

1. ***Select the Object Loan -> Click Field & Relationship -> New -> choose the Data Type as suitable Field Label Name -> Next -> Save.***

❖ ***Loan Id: Data Type is Auto Number LN- {0000}.***

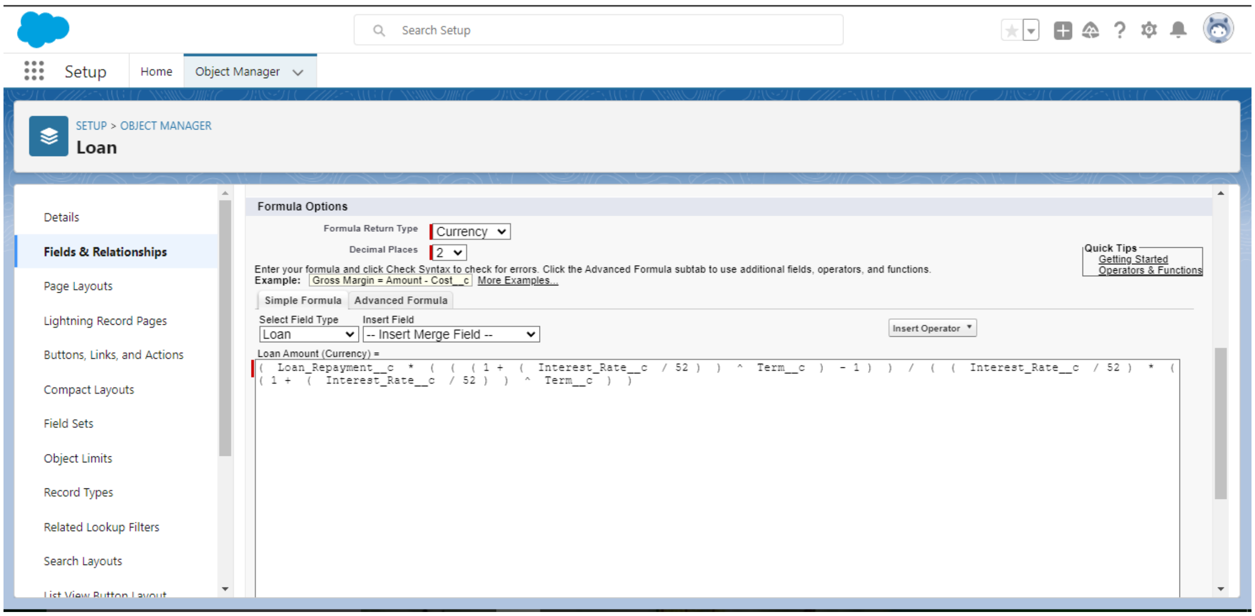
❖ ***Interest Rate: Select the Data type as Currency.***

❖ ***Term: Select the Data Type as Number.***

❖ ***Annual Loan: Field create the Number as the data type.***

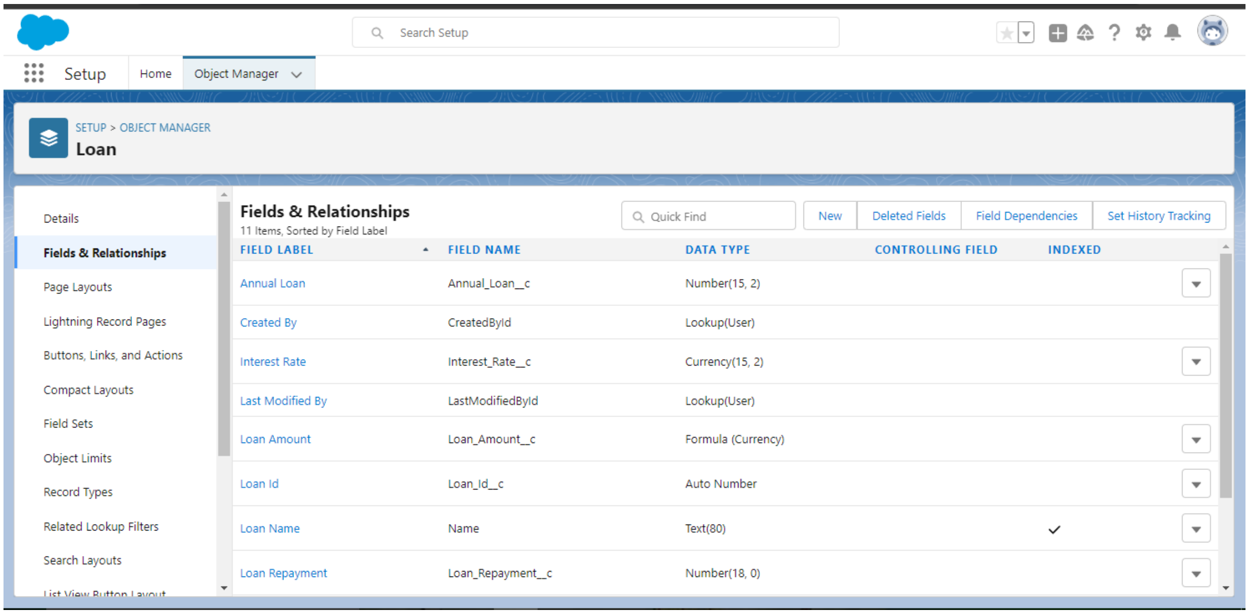
❖ ***Total Loan Instalments: Number as the data type.***

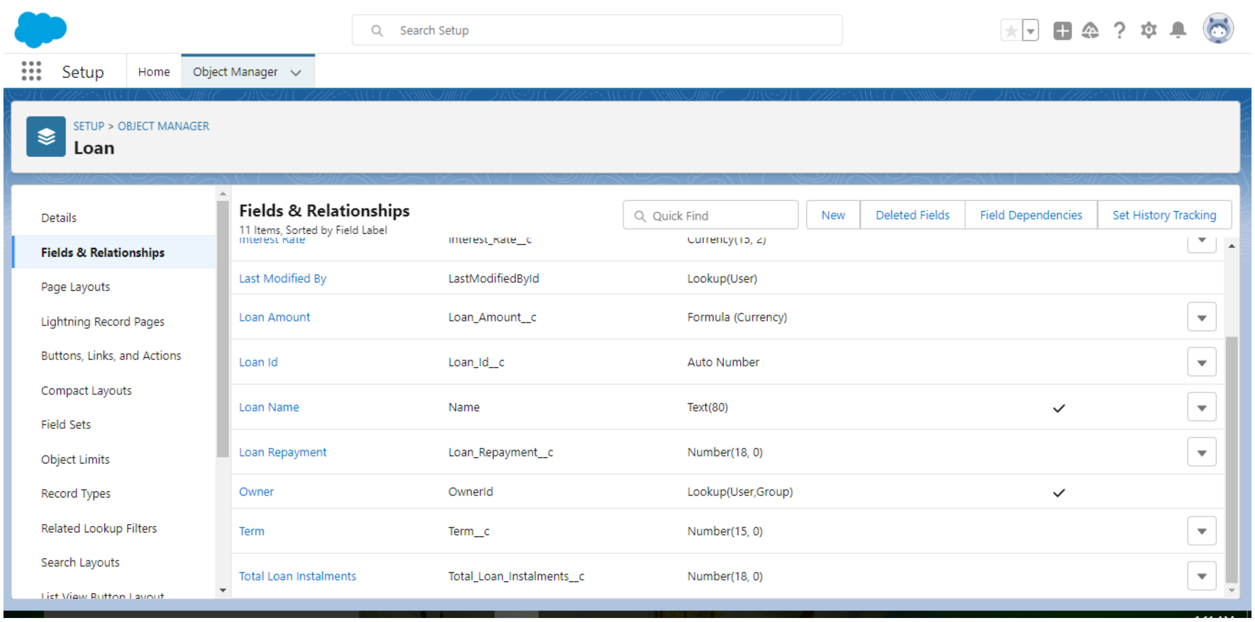
- ❖ ***Loan Repayment: Number as the data type.***
- ❖ ***Loan Amount: Select the Field Data Type as Formula. In Formula option select advanced formula and type the following formula.***



(Loan_Repayment__c * (((1+(Interest_rate__c/52))^ Term__c) -1))/((Interest_rate__c /52)*((1+(Interest_rate__c /52))^ Term__c))

Type this formula and check syntax, if there is no error and save it.



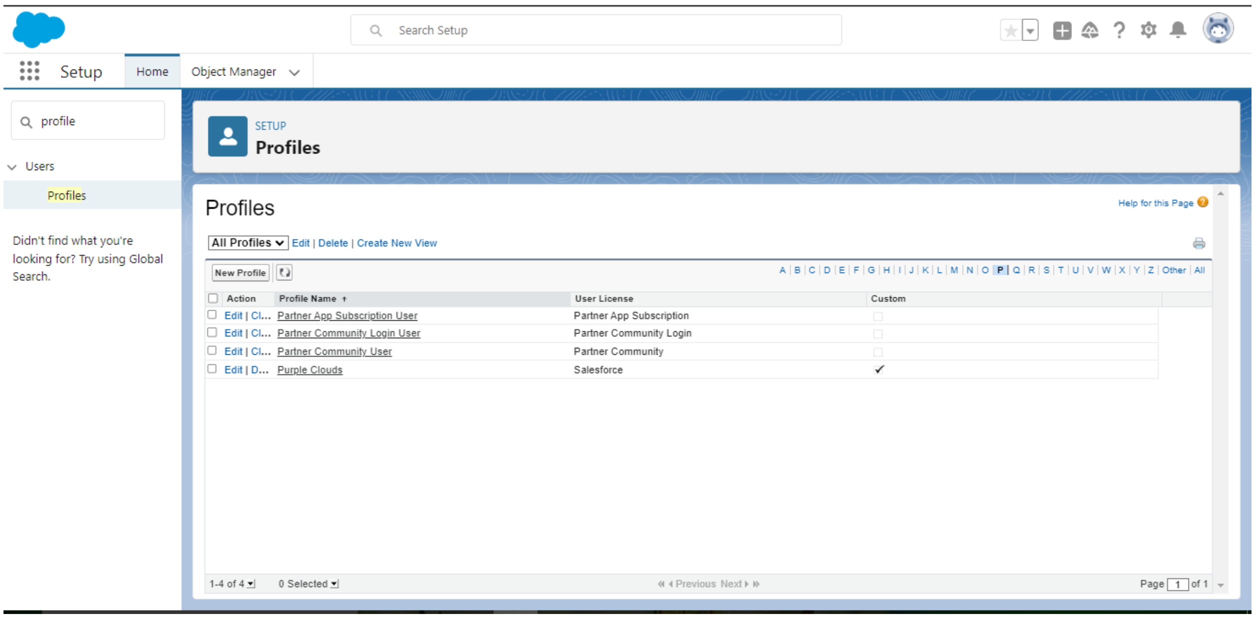


<u>Milestone 6-Profile</u>

Activity 1:

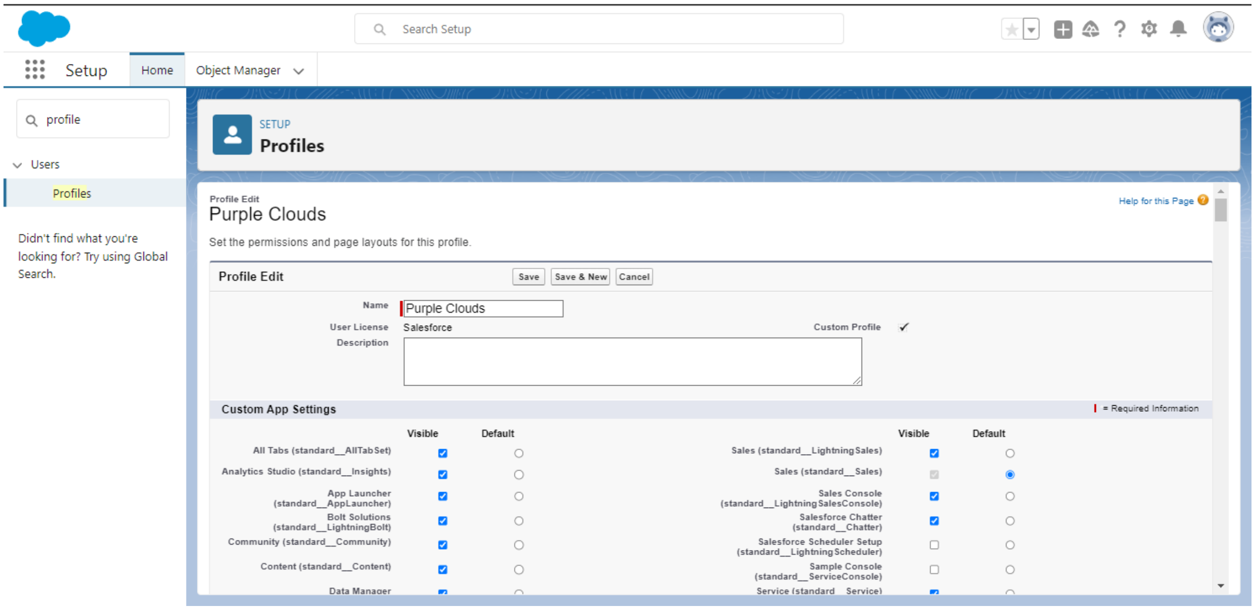
Create a New Profile:

1. *Go to Setup -> Search Profiles in Quick find -> Clone the profile (Standard User) -> Enter the Profile Name (Purple Clouds) You can give any profile Name (Label Name) -> save.*



2. *Click on the New Created profile (Purple Clouds) -> Next Profile Page will be Open -> Click on Edit.*
3. *Give the Custom Object permission which you want to give and give the view all access permission and assign to the profile -> Save it.*
4. *Again Go to the profiles -> You can see the A, B, C, D……like Now click S -> Click on Standard user profile -> Click Clone -> Give the Name as Sales Manager -> Save.*
5. *Again A, B, C, D…. Click S -> Click On Standard Platform User -> Click Clone -> Give the Name as Marketing*

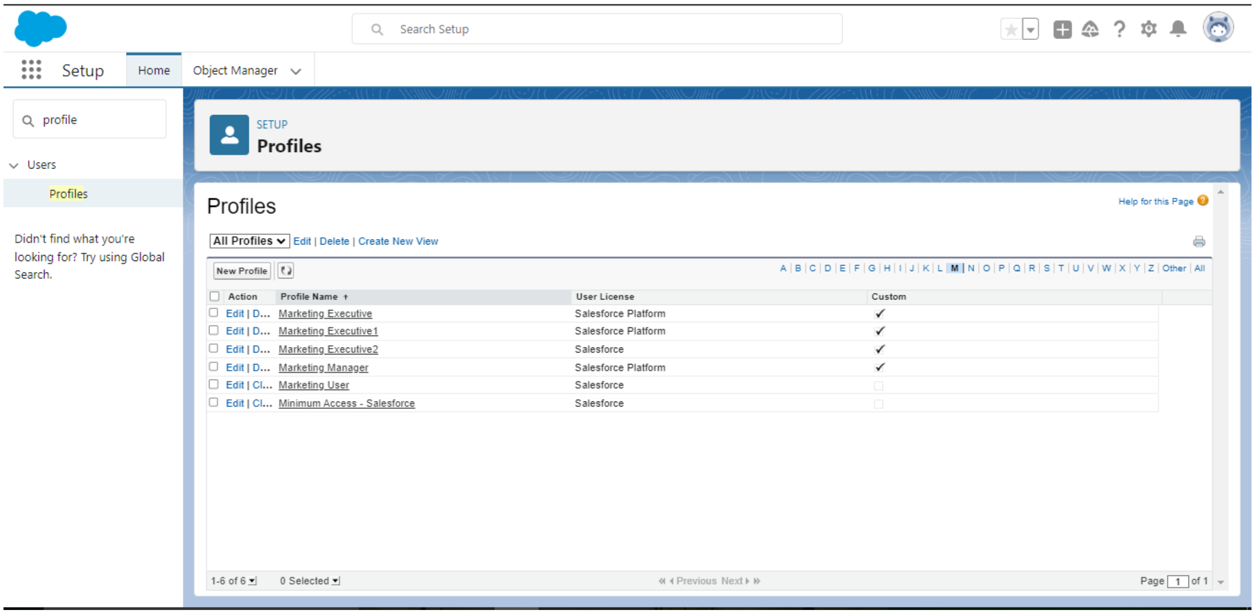
Executive 1 and Save it, Again Give Marketing Executive 2 And Save, again give the name as Marketing Manager.



Activity 2:

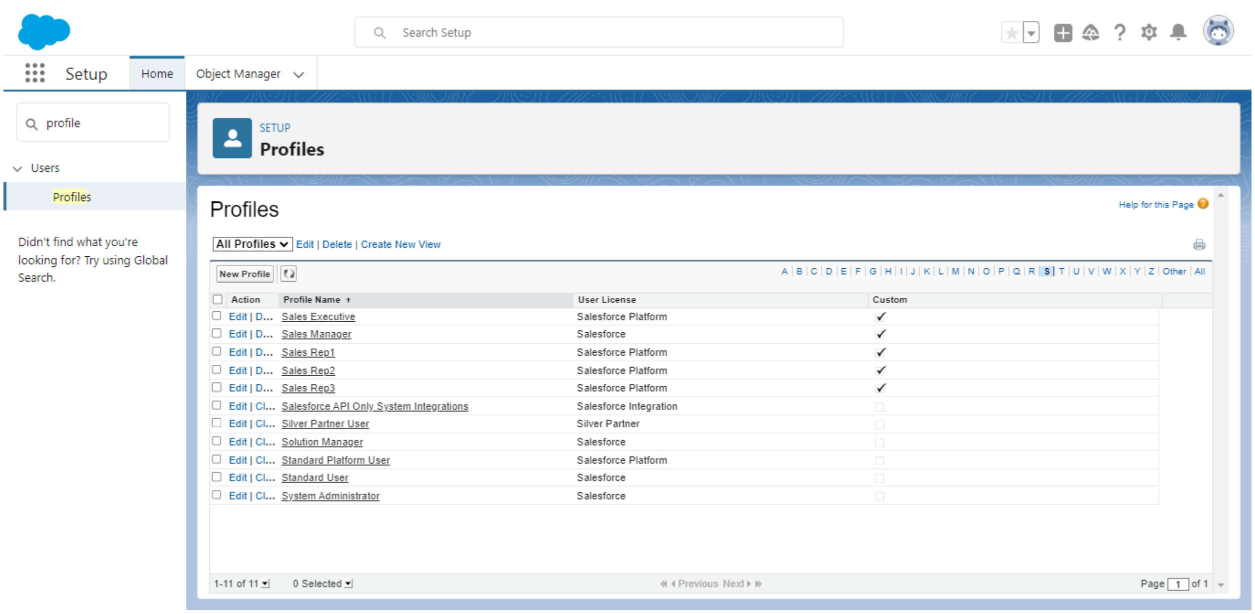
Create Marketing

1. ***Go to the Profile Marketing Executive -> Click Edit -> Give the Create access to all the Custom Objects permission.***
2. ***Go to the profile Marketing Executive -> Click Edit -> Give Read, Create, Edit, Delete for all the custom Objects.***
3. ***Save the Profile.***



Activity 3- Sales:

1. ***Clone the Profile Standard User -> Give the Label Name Sales Manager -> Save -> Again -> Give the Name as Sales Rep 1 -> Sales Rep 2 -> Sales Rep 3 -> Save it.***
2. ***Now you have created the 4 Profiles.***

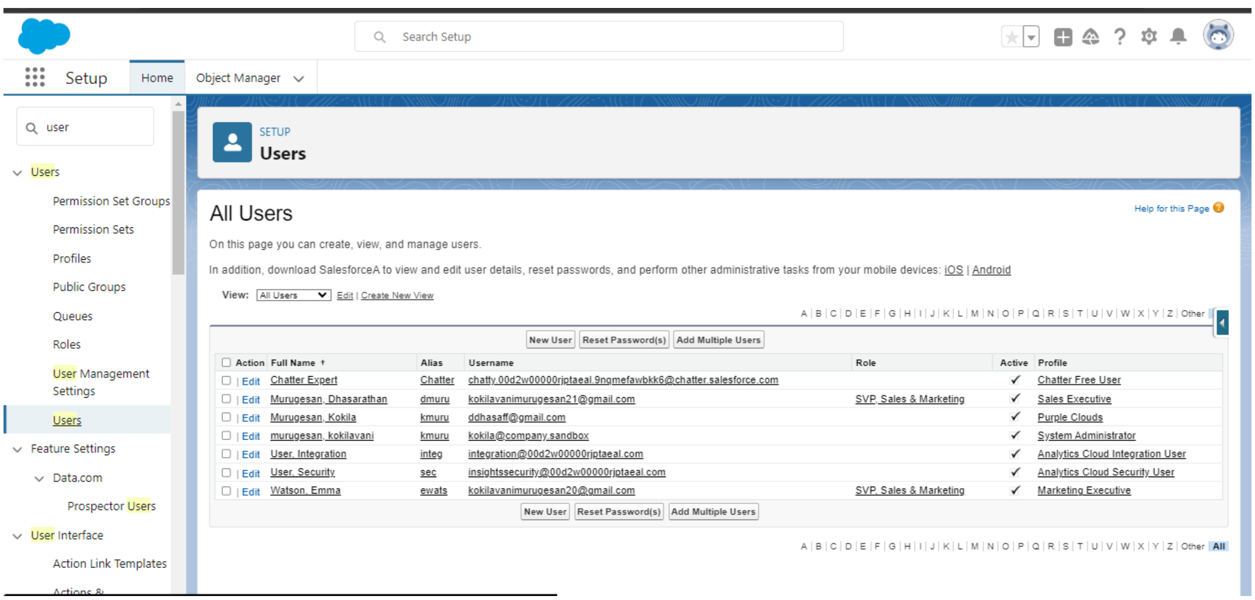


3. Go to the profile Sales Manager -> Click Edit -> Give the all custom Object Permission Create, Edit, Delete -> Save.
4. Again, Sales Rep 1 -> Give Access Read Create, Edit.
5. Sales Rep 2 -> Read, Create, Edit.
6. Sales Rep 3 -> Give the all Custom Object Permissions is Read Only -> Save it.

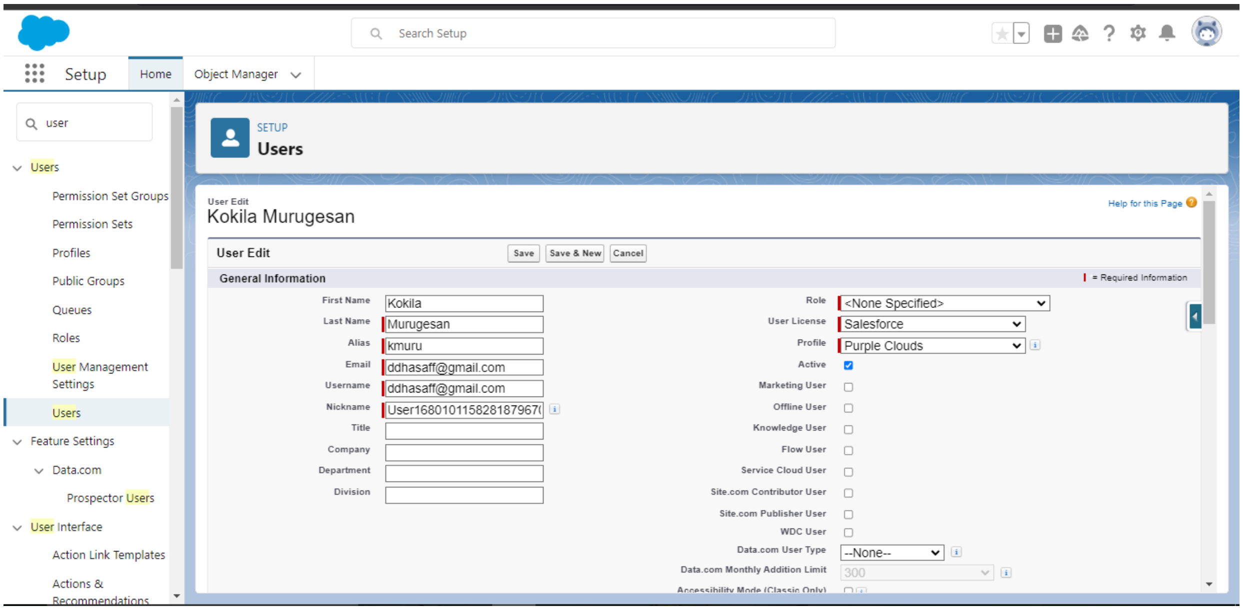
Milestone 7-New User

Activity 1:

1. Go to Setup Page -> Search Users in Quick Find -> Select Users -> Click New User.



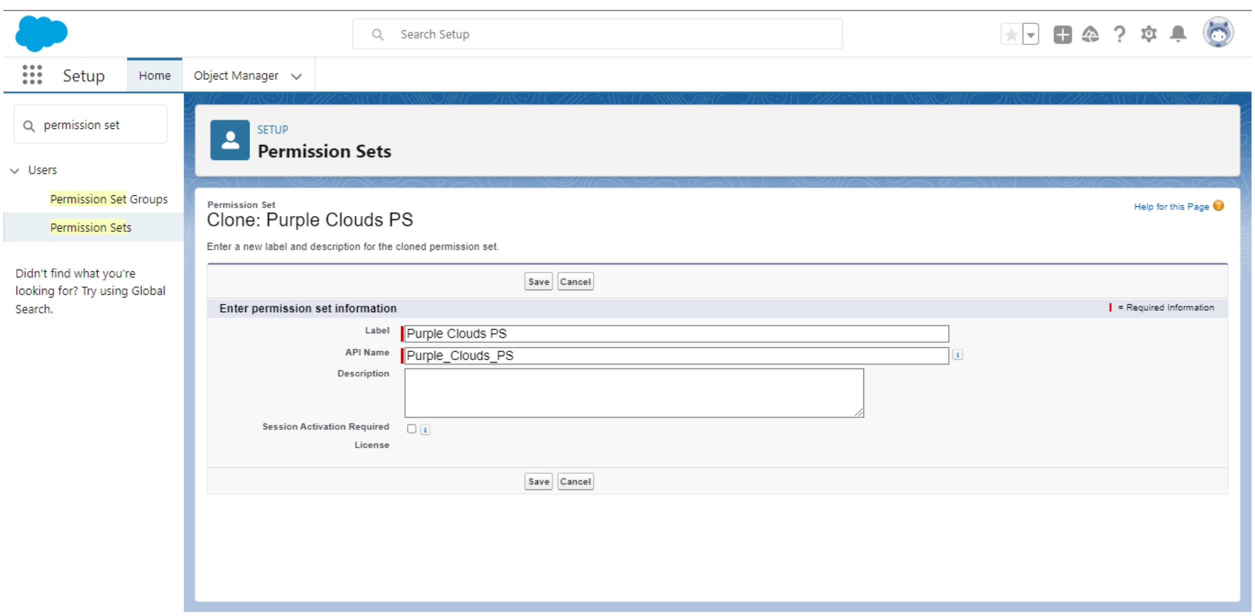
2. Fill the details (first Name, Last Name, alias, email id, username, nick name, select role, user, license, profiles) -> Save it.



Milestone 8-Permission Set

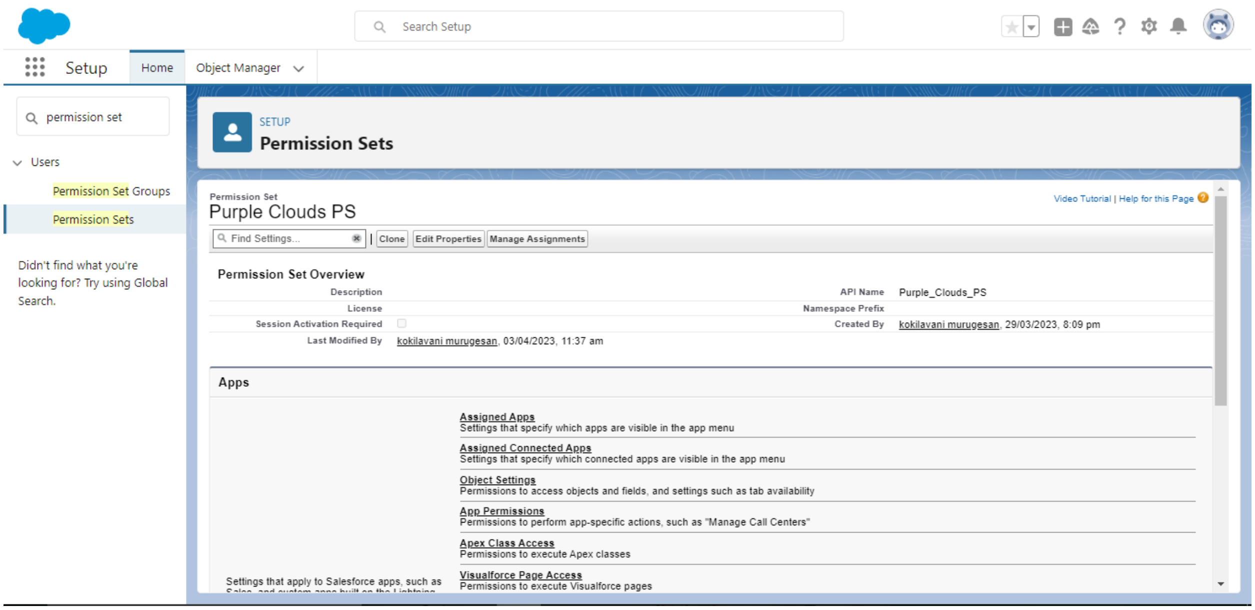
Activity 1:

1. ***Go to Setup Page -> Search Permission Seta in Quick find -> Select Permission Sets -> New.***

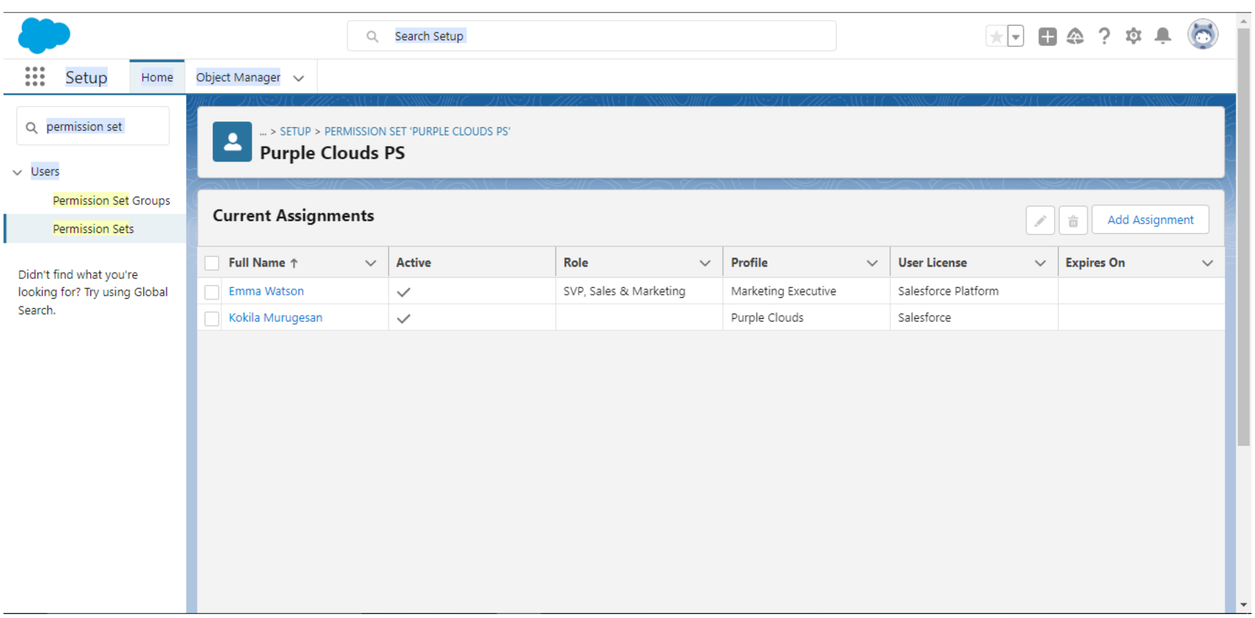


2. Enter the Label Name and Save.

3. Go to the New Permission Set which you have created -> Click on Manage assignment.



4. Now Click on the Add assignment.



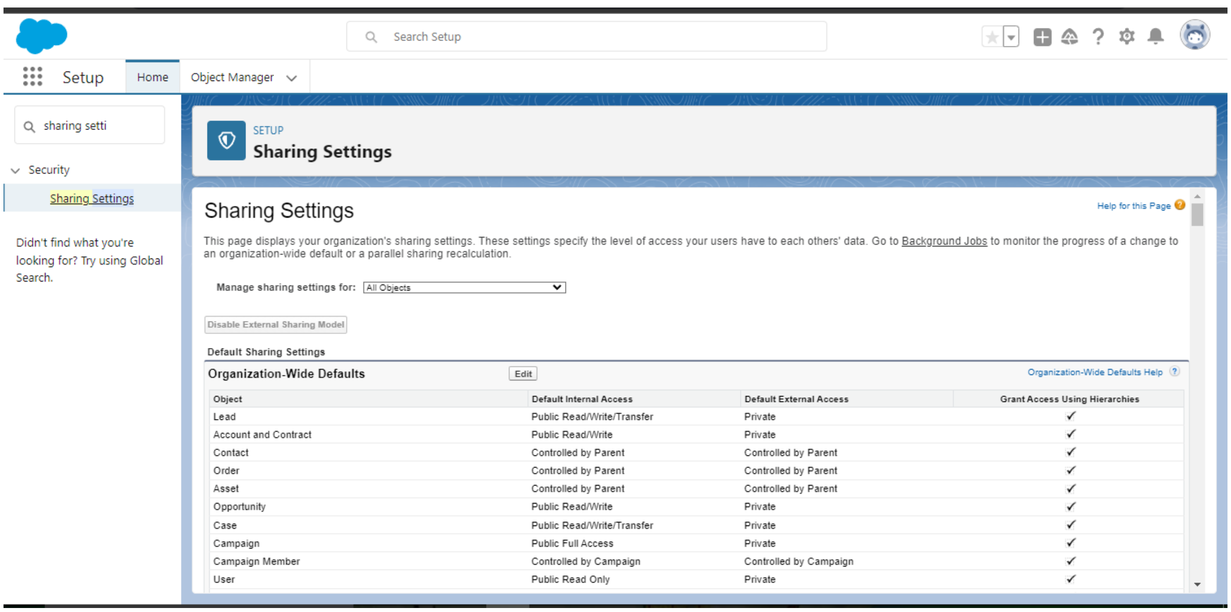
5. Finally Select the users and click on Save.

Milestone 9-Setup for OWD

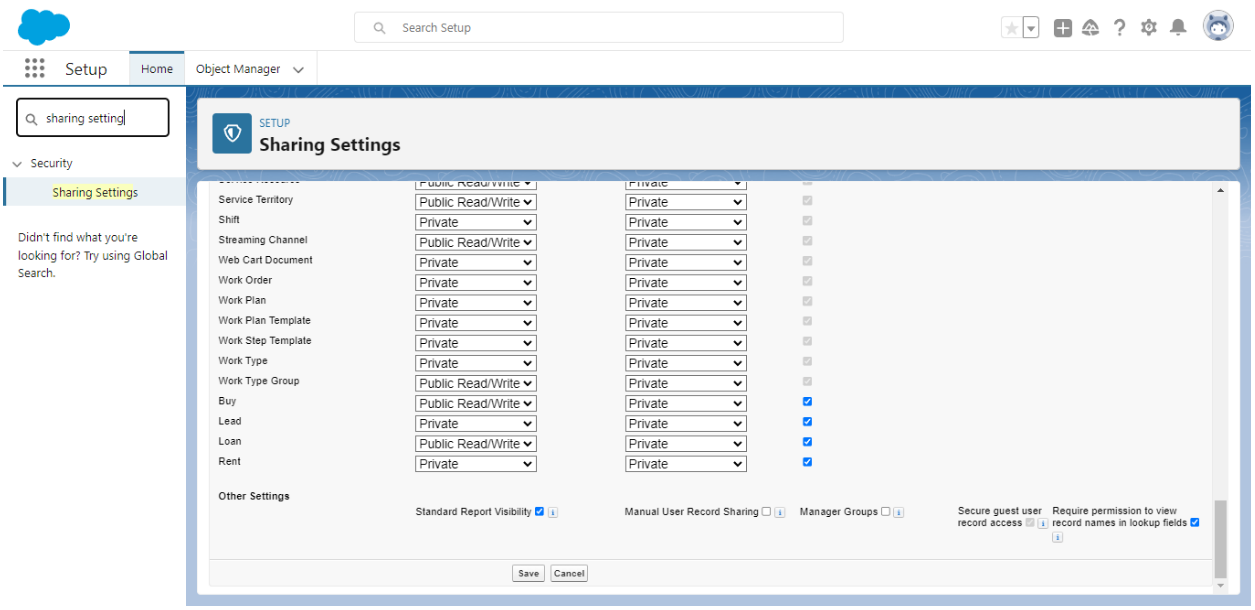
Activity 1:

Create OWD Setting

1. ***Go to Setup page -> In quick Find Box Search Sharing Settings -> Click Edit in the Organization-Wide Defaults -> Select Defaults access for each Object.***



2. ***Lead and Rent Select both private for internal and external.***
3. ***Click on Save.***



Activity 2:

Marketing: In OWD setting give it as a Private for both Marketing Manager and Marketing Executive.

Sales: Same procedure Sales Manager OWD is set as Private for Sales Rep 1 and Sales 2. Save it.

<u>Milestone 10-Report</u>

Activity 1:

Create Report

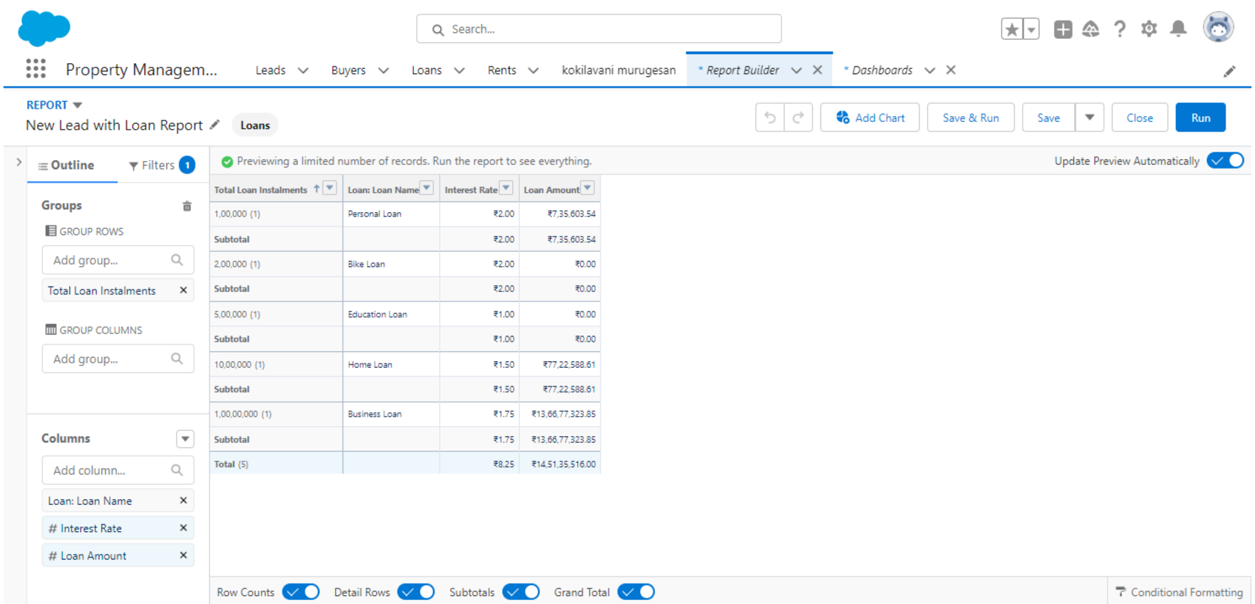
1. *Go to app launcher (9 dots) -> search Property Management -> Go to the app -> Search Reports in app launcher -> Click on reports tab.*

2. Click New Report.

3. Select Report Type as Loans -> Click on Start the Report

4. In Outline heading Below select Row as Total Loan Instalments -> Select Column as Loan Name, Interest Rate, Loan Amount.

5. Customize the Report and Save & Run it.



Go to the object Manager -> Click Loan Object -> New -> create the records in Loan Object -> save.

<u>Milestone 11-Dashboards</u>

Activity 1:

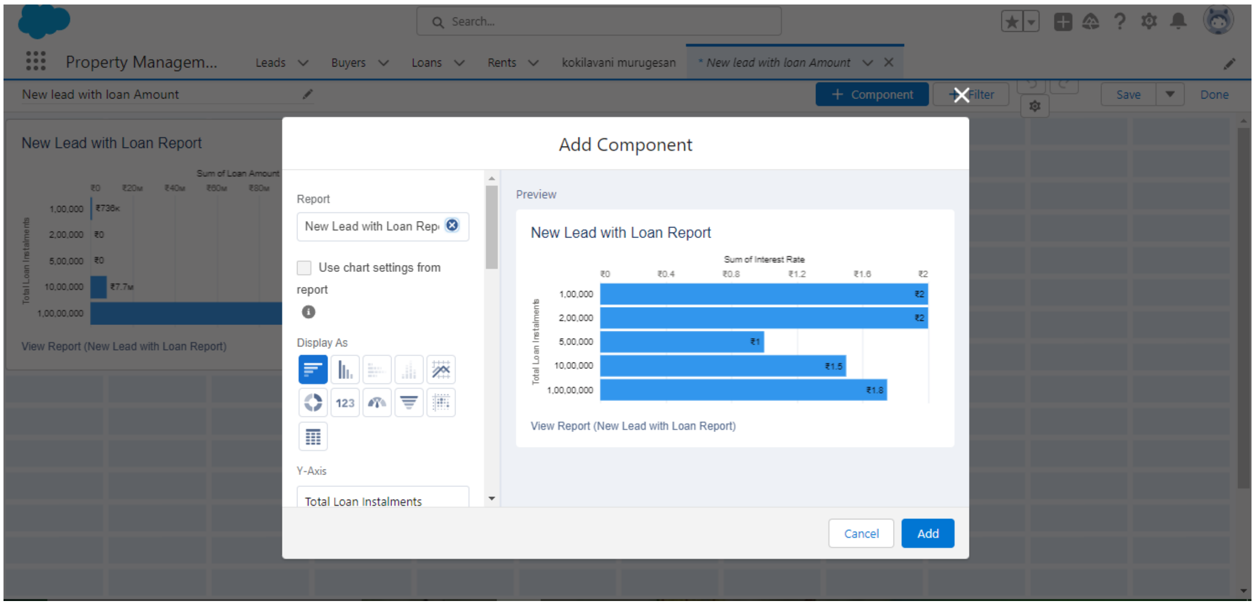
Create Dashboards

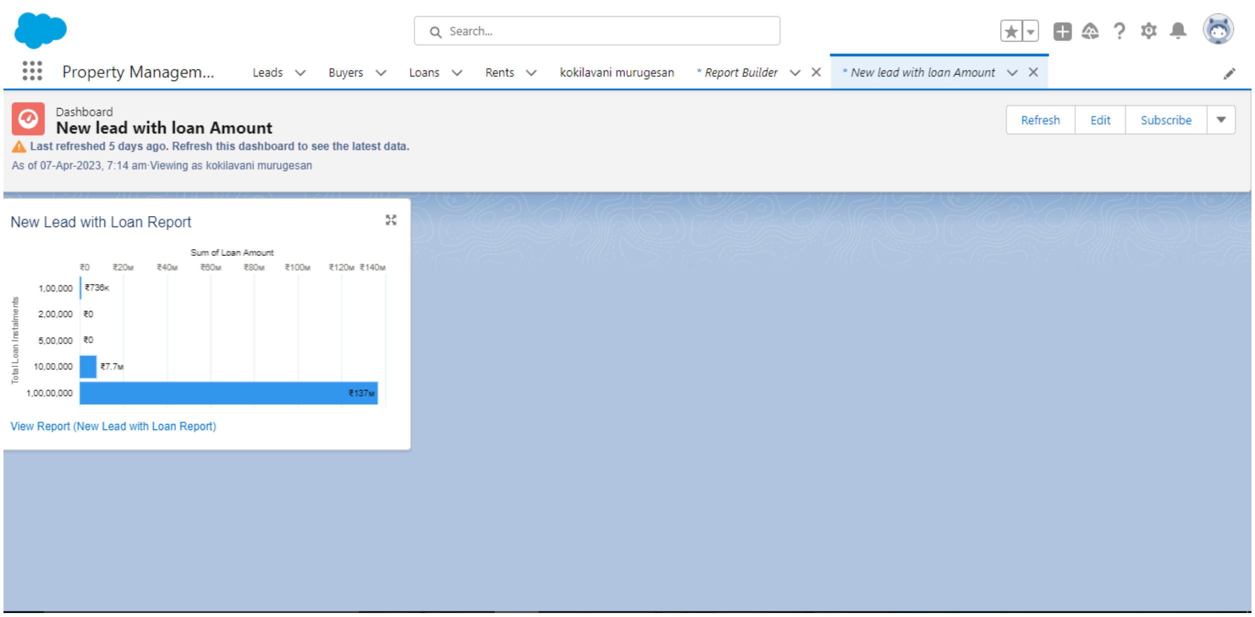
1. Go to the App Launcher and select the Dashboards.

2. Select New Dashboards give the name New Lead with Loan Report and Select Folder Loan Amount -> Create.

3. Select the Report New Lead with Loan Report -> Select

4. Click on +component -> Select the display chart -> Add.



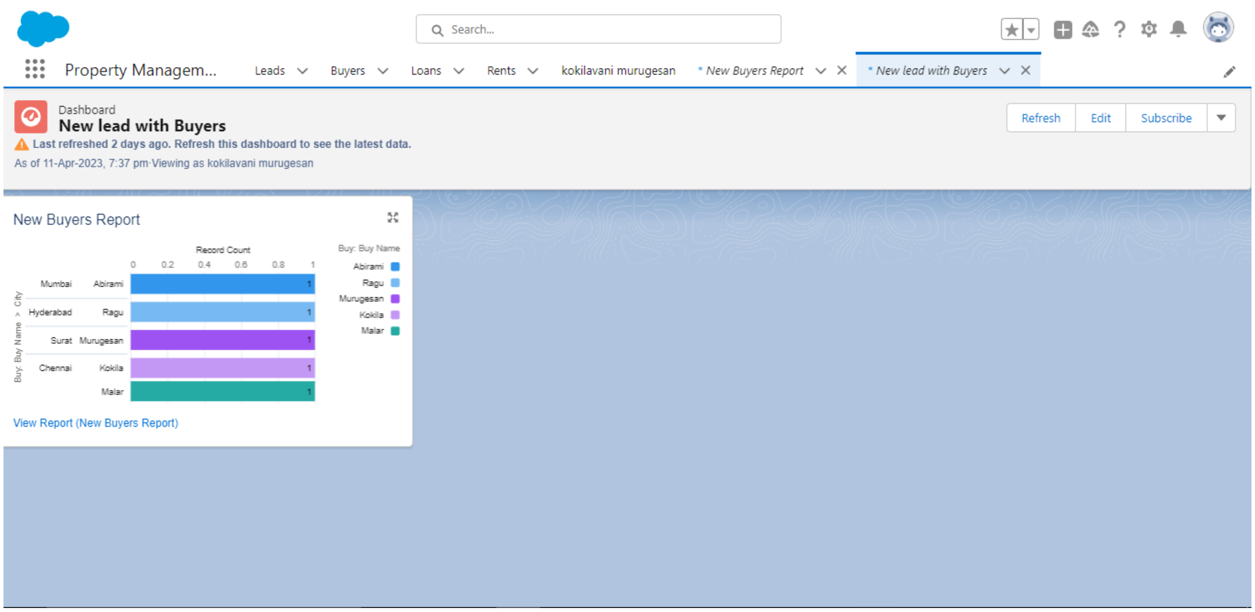


5. Save it.

Activity 2:

Create Dashboard

1. ***First Create the Records to the same procedure (Buyers).***
2. ***Create Reports as same (Buyers)***
3. ***Create the Dashboard give it as a name New Lead with Buyers Report -> +component and Add the chart.***
4. ***Next Save.***
5. ***Display it in the home page.***



TRAILHEAD PROFILE PUBLIC URL

Team lead - https://trailblazer.me/id/kokila200

Team Member 1 - https://trailblazer.me/id/suvi2003

Team Member 2 - https://trailblazer.me/id/abirami1218

Team Member 3 - https://trailblazer.me/id/ssneka8

ADVANTAGES AND DISADVANTAGES

ADVANTAGES

- ***You'll save time and money by being more efficient.***
- ***You can access your data from any locations.***
- ***By improving your online presence, you will increase bookings.***
- ***Using the built-in pricing tools, you can optimize your revenue system.***
- ***Represents a centralized, efficient document platform.***
- ***Property Management systems make it easier for coordinating the functions of the front office, guest management, sales, planning, and reporting.***

DISADVANTAGES

- ***You'll be reliant on a single vendor.***
- ***In the beginning, the cost may be prohibitive.***
- ***Time consuming if you choose the wrong system.***
- ***Scaling revenue.***
- ***Project cost, Lack of time.***
- ***Keeping up with maintenance requests.***

APPLICATIONS

- ***Reservation Management.***
- ***Yield Management***

- ***Marketing and Sales Support.***
- ***Registration***
- ***Inquiries/Reports***
- ***Maintenance Management.***
- ***CRM & guest communication.***
- ***Mobile Apps.***

CONCLUSION

- ❖ ***In conclusion, Property Management System (PMS) software is very crucial for all Hotels. 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 upkeep of properties.***
- ❖ ***Property management has long been overlooked in the real estate industry, but the future of property management is brighter than ever.***

FUTURE SCOPE

- ✔ ***Technical proposal writer.***
- ✔ ***Commercial broker.***
- ✔ ***Resident Architect.***
- ✔ ***Property Manager.***
- ✔ ***Preventive maintenance, cleaning, interior and exterior, and construction will all fall within the***

scope of the responsibilities of a property management firm.