

1. Introduction

1.1 Overview

Property Management



Property management is the daily oversight of residential, commercial, or industrial real estate by a third-party contractor. Generally, property management take responsibility for day-to-day repairs and ongoing maintenance, security, and upkeep 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.

The responsibilities of a property manager generally involve the following:

- Screening potential tenants
- Drafting, signing, and renewing leases on behalf of property owners
- Collecting rent
- Maintenance of properties, including landscaping and snow removal
- Arranging for necessary repairs to properties
- Setting up and adhering to budgets for property maintenance
- Understanding state and national landlord-tenant laws and regulations

- Marketing properties
- Supervising other employees
- Handling taxes

Types of Property Management

Just as property comes in many types, so do property managers. Some firms are specialized in providing management for a particular type of property, while others offer management services over a range of property types. A huge range of property types can be managed.

Residential Property Management

Residential property managers are typically hired for rental properties, and they manage the rental process. They can be hired to manage:

- Single-family homes
- Vacation rentals
- Multifamily homes
- Town houses
- Condominiums
- Apartments
- Manufactured homes

Commercial Property Management

Commercial property owners have different needs from those who own residential property. Commercial property management can apply to:

- Public accommodations like hotels
- Retail properties like malls, restaurants, and gas stations
- Office properties like real estate brokerages or doctors' offices
- Co-working spaces where professionals rent work space by the day or the hour

Industrial Property Management

Industrial properties that can benefit from management include:

- Heavy manufacturing facilities such as automotive plants and steel mills
- Light manufacturing factories such as food packaging
- Warehouses
- Distribution facilities

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Special Property Management Considerations

Property management licensing requirements vary by state.

Most states require property management companies to be licensed by the local real estate board, so property owners need to make sure that the firms they hire are properly licensed.

For instance, property managers in Florida are required to have real estate broker's licenses to operate in the state. That's because some of their responsibilities are deemed real estate activity. Holding a real estate broker's license allows property managers to list rental properties in the multiple listing service (MLS) and to market the properties by standard real estate marketing methods. Holding a real estate broker's license also allows the property management company to place a real estate board lock box on a property's door so that other licensed agents can show the property.

Florida also requires property managers to hold a broker's license if they deal with rentals or leases and receive a commission for their services. However, property managers who manage the properties that they own in the state don't need a license to do so.

Managers in Massachusetts don't require a broker's license. That's because certain duties considered to be real estate activities, such as listing and leasing properties, may be secondary to the main duties performed by the property manager.

1.2 Purpose

The purpose of management is to plan, direct, organize and ensure the success of a business at various levels through a number of methods including customer satisfaction and employee training. Management, normally made of a manager and their assistants, is key to running an organization on what could be considered microscopic levels.

At the most fundamental level, management is a discipline that consists of a set of five general functions: **planning, organizing, staffing, leading and controlling**. These five functions are part of a body of practices and theories on how to be a successful manager.

A Management Company is a party to certain leases or transfer documents. The company's role is **to be responsible for the management of the service charge and the**


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delivery of management and maintenance services at the development. A typical lease will have two or three parties (bi-bipartite).

The role of a manager is to **provide common guidance and direction to the individual efforts for the fulfillment of organizational goals.** Increasing the efficiency: Management helps in increasing the efficiency of the business by increasing productivity through efficient planning, organizing, controlling and directing.


2. Problem definition & design thinking

2.1 Empathy map



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.



Says
What have we heard them say?
What can we imagine them saying?

I need to streamline my communication with tenants, constructors.

I need to keep track of all my properties and tenants

I want to have a clear overview of property performance and profitable.

preparing least agreement

Thinks
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?


Monitor work order system, create and follow up on all calls.

I'm worried about missing important deadlines such as rent payment due dates or lease renewals

I need to make sure my properties are well-maintained and profitable.

I'm always busy and need an application that can help me save time.

Malathi Property Manager



Does
What behavior have we observed?
What can we imagine them doing?

Manage multiple properties and tenants

Schedules and manages maintenance and repairs


Collects rent payments and manages finances

Feels
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

Hopeful that a new solution could improve efficiency and productivity

stressed about managing multiple properties and tenants





Frustrated with the current manual processes and systems



Need some inspiration?

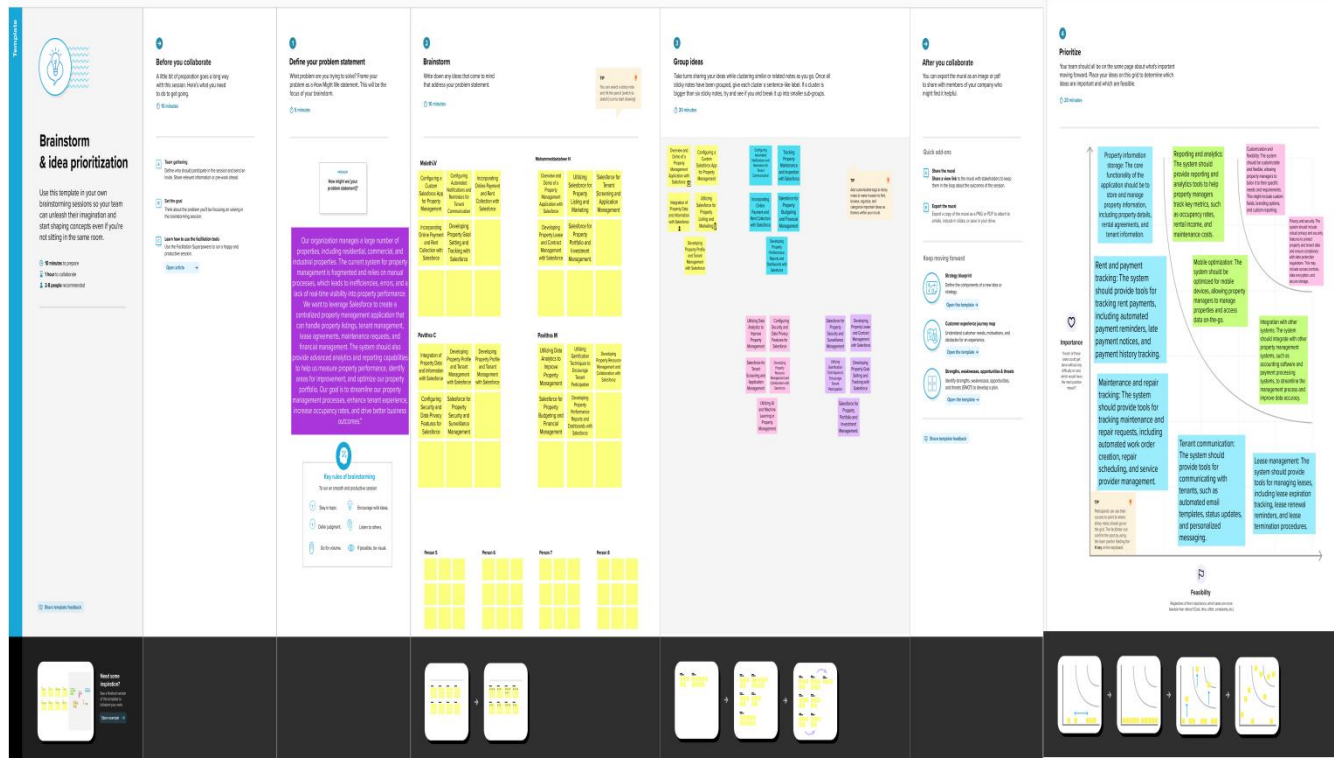
See a finished version of this template to kickstart your work.

[Open example](#)


→

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→


2.2 Ideation and brainstorming map

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3. Result

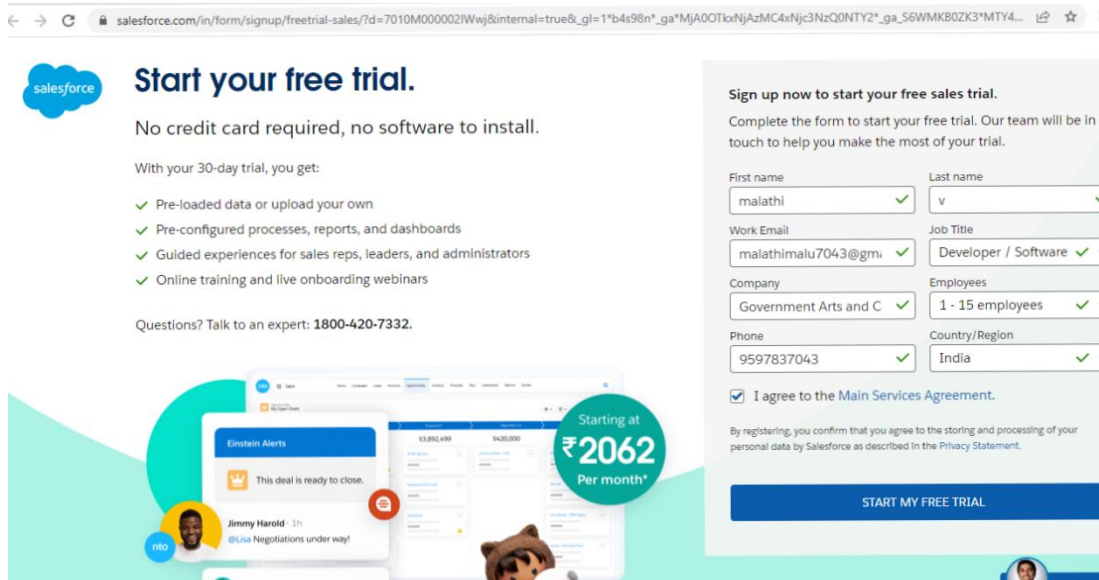
3.1 Data model

OBJECT NAME	FIELD IN OBJECT	
	FIELD LABEL	DATA TYPE
LEAD	Lead	Auto number
	State	Pick list
	City	Pick list
	Email	Email
	Phone	Phone
BUY	Property type	Pick list
	Discount	Percentage
	State	Pick list
	City	City
RENT	Rent	Auto number
	Rental city	Text
	BHK type	Pick list
LOAN	Loan ID	Auto number
	Interest Rate	Currency
	Term	Number
	Annual loan	Number
	Total loan installments	Number
	Loan repayment	Number
	Loan Amount	Formula

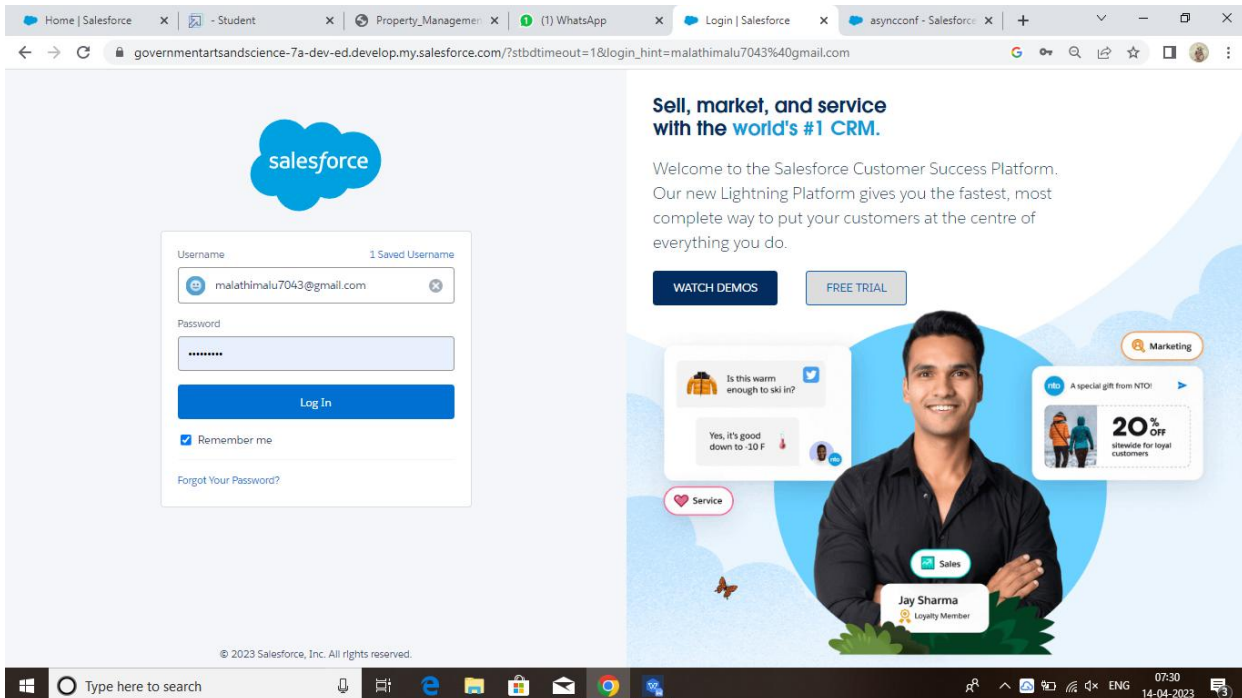
3.2 Activity and screenshot

Milestone 1-Slaesforce

Activity1:

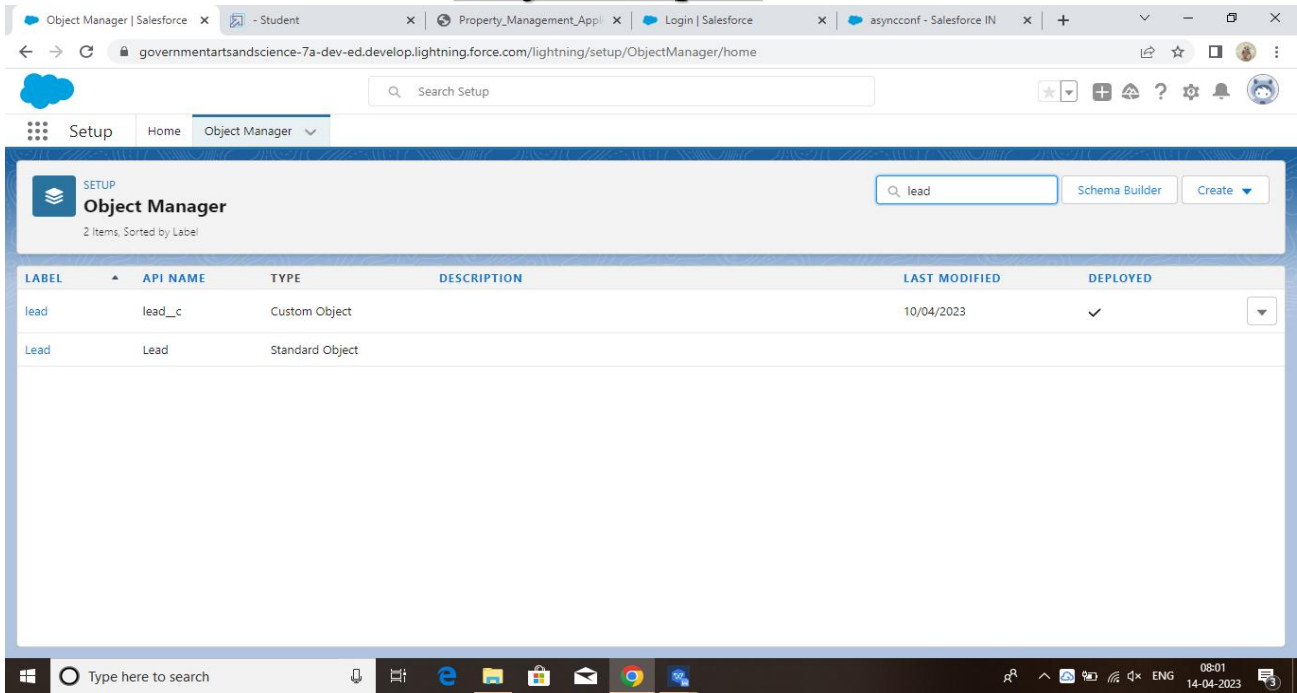


Activity2:



Milestone 2- Object

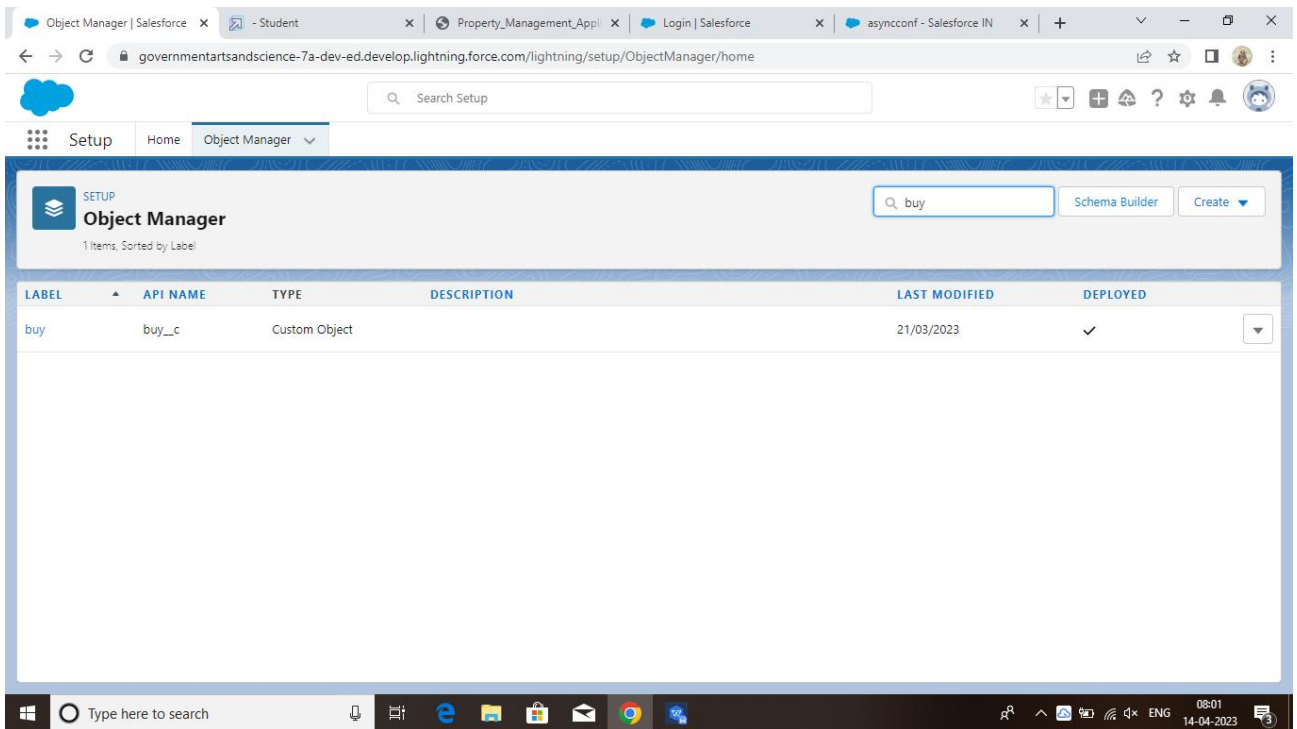
Activity 1:



The screenshot shows the Salesforce Object Manager interface. The search bar contains the text 'lead'. The results table shows two items:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
lead	lead__c	Custom Object		10/04/2023	✓
Lead	Lead	Standard Object			

Activity 2:

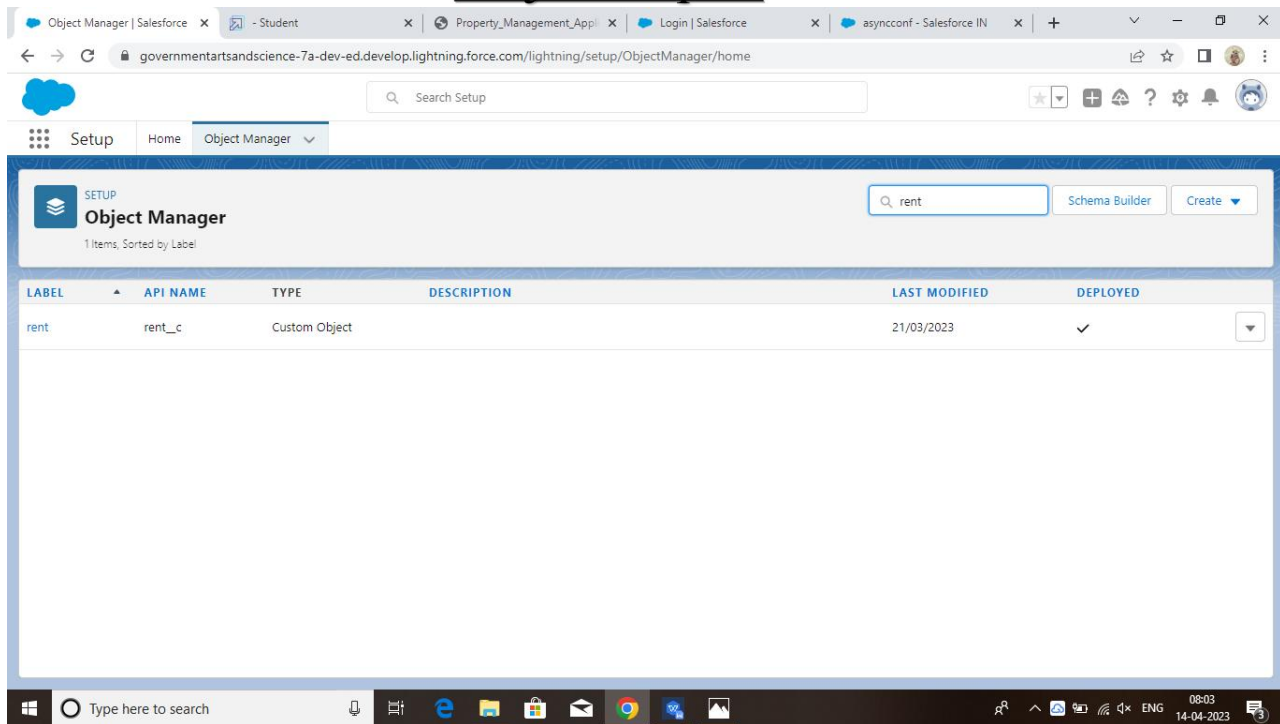


The screenshot shows the Salesforce Object Manager interface. The search bar contains the text 'buy'. The results table shows one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
buy	buy__c	Custom Object		21/03/2023	✓

Activity 3:

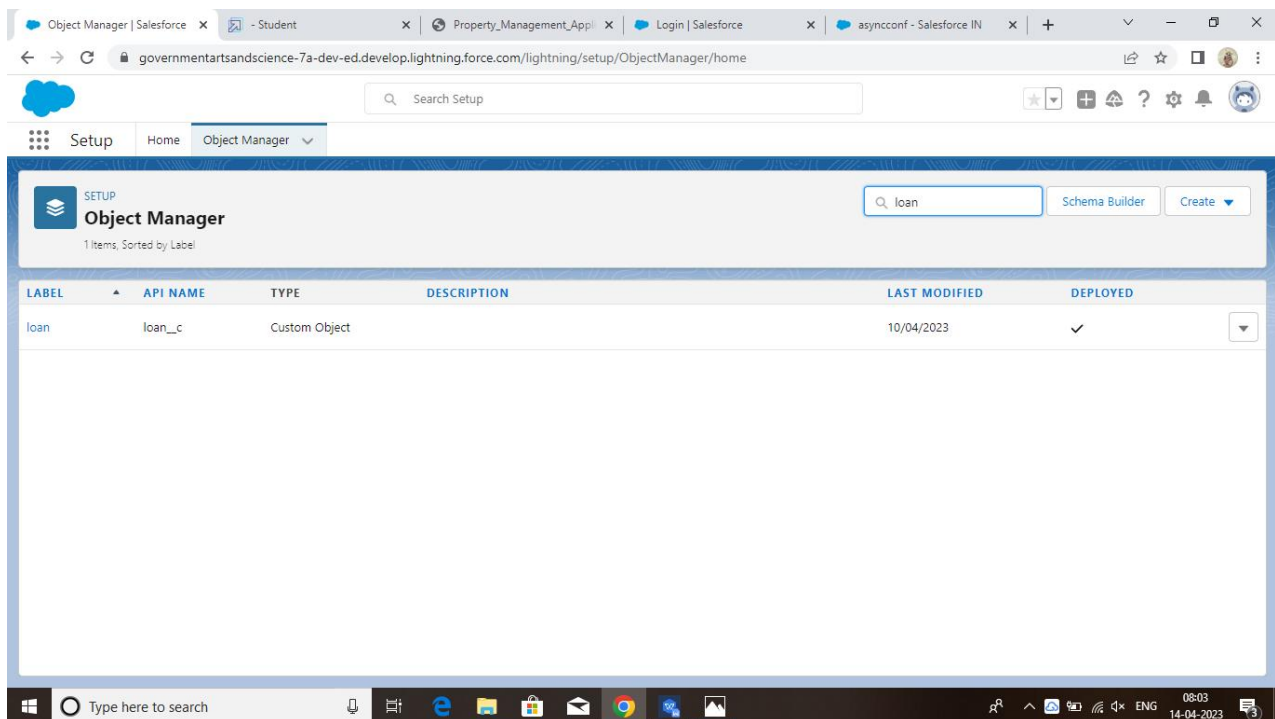
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The screenshot shows the Salesforce Object Manager interface. The browser tabs include 'Object Manager | Salesforce', '- Student', 'Property_Management_App', 'Login | Salesforce', and 'asynconf - Salesforce IN'. The address bar shows the URL: `governmentartsandscience-7a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is 'Object Manager' with a subtitle '1 Items, Sorted by Label'. A search bar contains the text 'rent'. Below the search bar, there is a table with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
rent	rent_c	Custom Object		21/03/2023	✓

Activity 4:



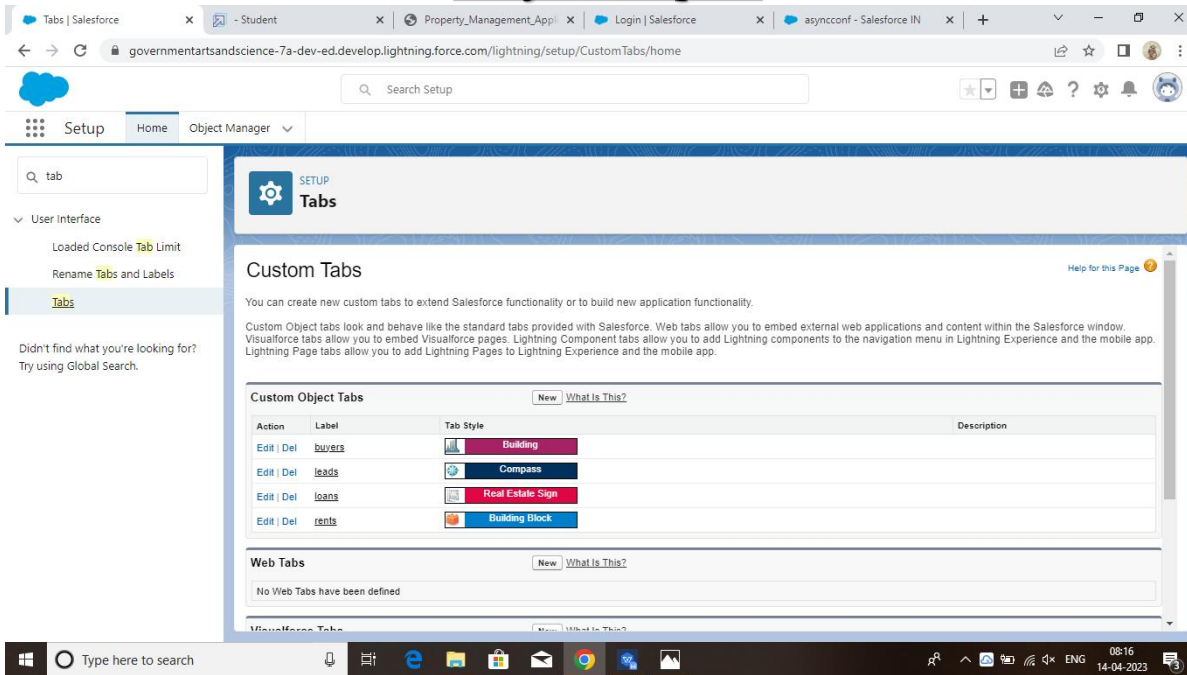
The screenshot shows the Salesforce Object Manager interface. The browser tabs include 'Object Manager | Salesforce', '- Student', 'Property_Management_App', 'Login | Salesforce', and 'asynconf - Salesforce IN'. The address bar shows the URL: `governmentartsandscience-7a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is 'Object Manager' with a subtitle '1 Items, Sorted by Label'. A search bar contains the text 'loan'. Below the search bar, there is a table with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
loan	loan_c	Custom Object		10/04/2023	✓

Milestone 3: Tab

All Activities:

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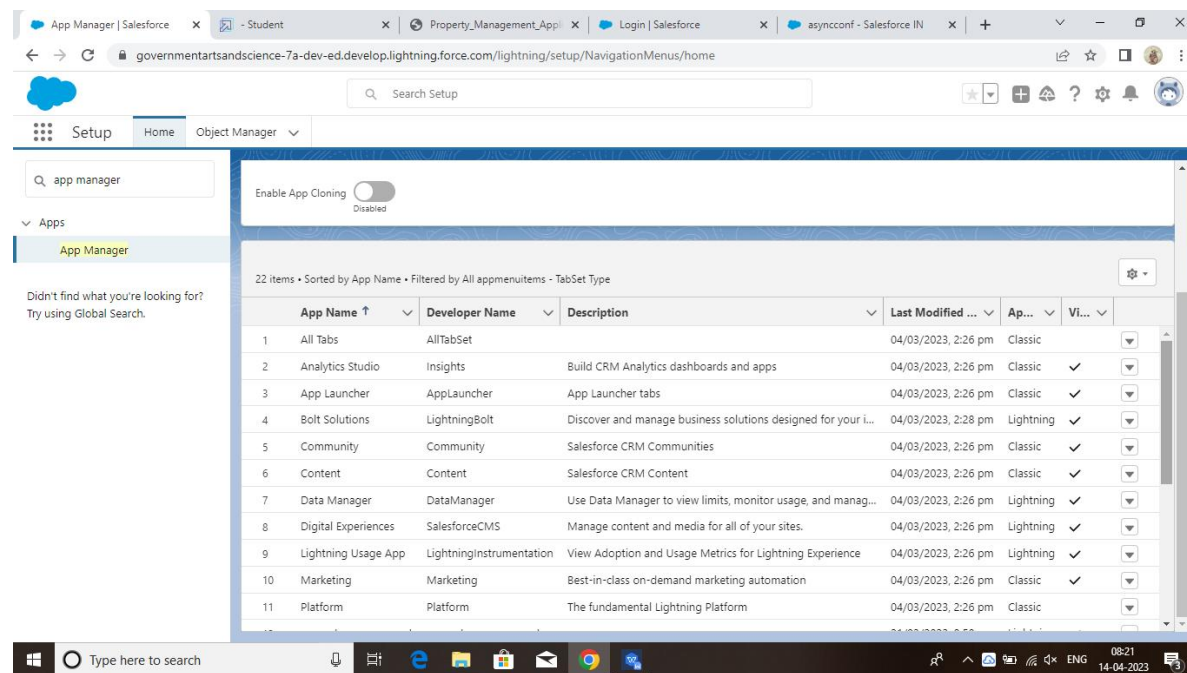


The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with 'tab' and a list of categories: User Interface, Loaded Console Tab Limit, Rename Tabs and Labels, and Tabs (selected). The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a brief explanation of custom tabs and their types. The 'Custom Object Tabs' section shows a table with columns for Action, Label, Tab Style, and Description. The 'Web Tabs' section shows a message that no web tabs have been defined. The 'Visualforce Tabs' section is partially visible at the bottom.

Action	Label	Tab Style	Description
Edit Del	buyers	Building	
Edit Del	leads	Compass	
Edit Del	loans	Real Estate Sign	
Edit Del	rents	Building Block	

Milestone 4 - The Lightning App

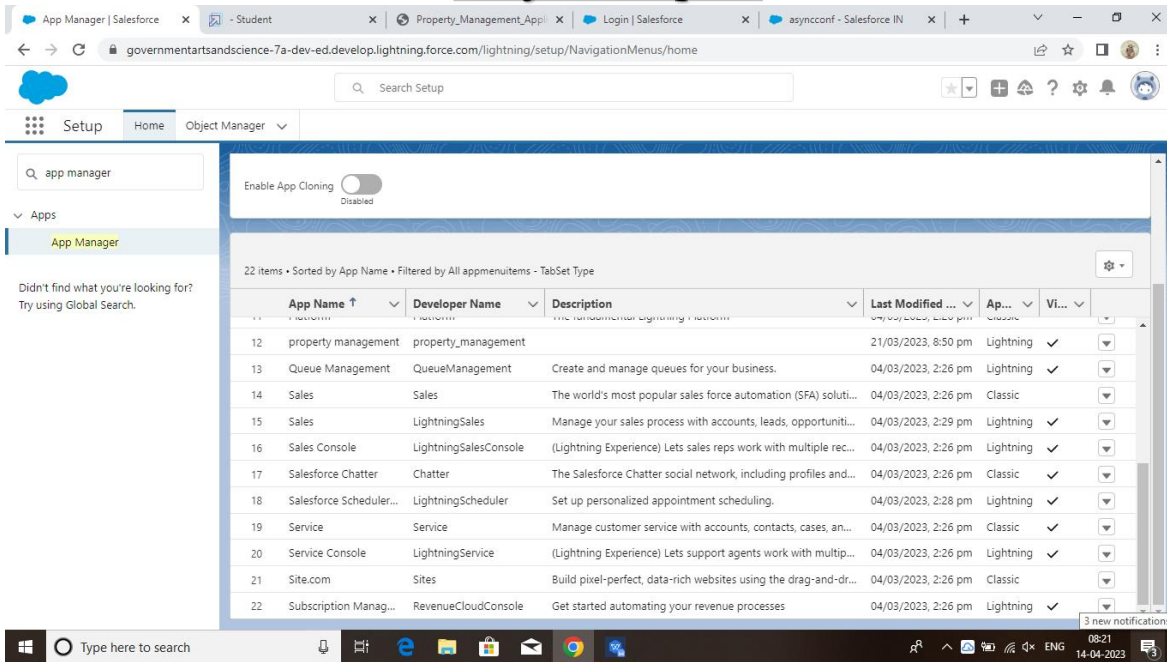
All Activities:



The screenshot shows the Salesforce Setup interface for the App Manager. The left sidebar contains a search bar with 'app manager' and a list of categories: Apps (selected) and App Manager. The main content area is titled 'App Manager' and includes a toggle for 'Enable App Cloning' (Disabled). Below the toggle, there is a table with columns for App Name, Developer Name, Description, Last Modified, App..., and Vi... The table lists 11 apps, including All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing, and Platform.

App Name	Developer Name	Description	Last Modified	App...	Vi...
1 All Tabs	AllTabSet		04/03/2023, 2:26 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/03/2023, 2:26 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	04/03/2023, 2:26 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	04/03/2023, 2:28 pm	Lightning	✓
5 Community	Community	Salesforce CRM Communities	04/03/2023, 2:26 pm	Classic	✓
6 Content	Content	Salesforce CRM Content	04/03/2023, 2:26 pm	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manag...	04/03/2023, 2:26 pm	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	04/03/2023, 2:26 pm	Lightning	✓
9 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	04/03/2023, 2:26 pm	Lightning	✓
10 Marketing	Marketing	Best-in-class on-demand marketing automation	04/03/2023, 2:26 pm	Classic	✓
11 Platform	Platform	The fundamental Lightning Platform	04/03/2023, 2:26 pm	Classic	✓

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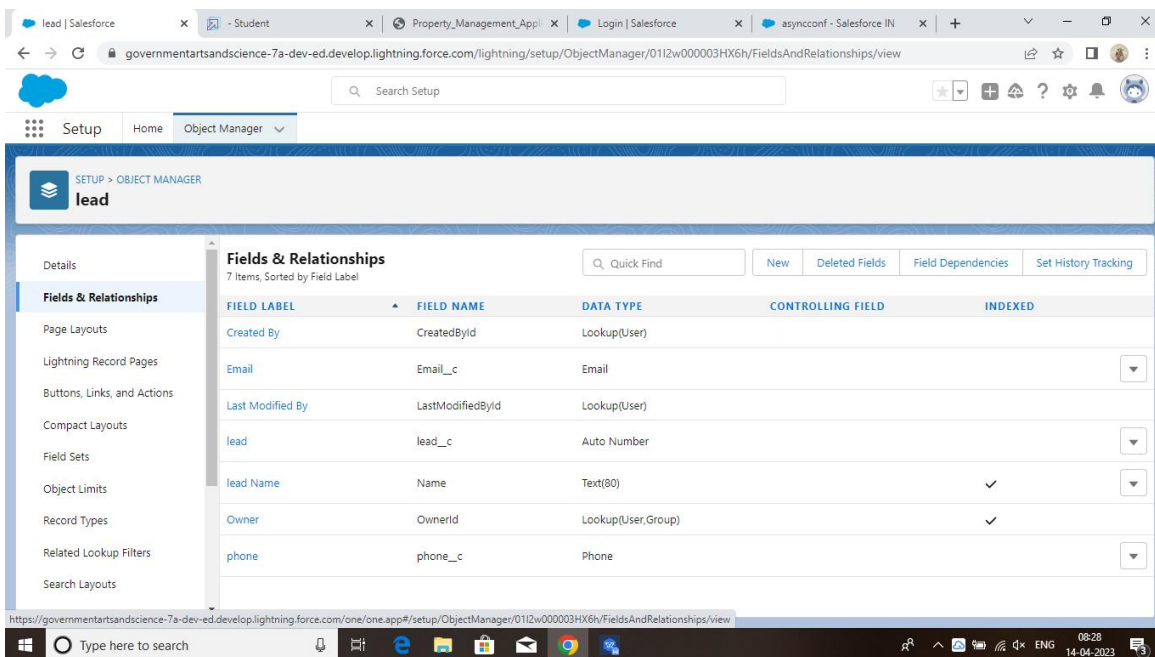


The screenshot shows the Salesforce App Manager interface. The left sidebar contains a search bar with 'app manager' and a list of apps. The main area displays a table of 22 items, sorted by App Name. The table columns are App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table lists various Salesforce apps like property management, Queue Management, Sales, Sales Console, Salesforce Chatter, Salesforce Scheduler, Service, Service Console, Site.com, and Subscription Management.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
property management	property_management	Create and manage queues for your business.	21/03/2023, 8:50 pm	Lightning	✓
Queue Management	QueueManagement	Create and manage queues for your business.	04/03/2023, 2:26 pm	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution.	04/03/2023, 2:26 pm	Classic	✓
Sales Console	LightningSales	Manage your sales process with accounts, leads, opportunities, and more.	04/03/2023, 2:29 pm	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records.	04/03/2023, 2:26 pm	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and groups.	04/03/2023, 2:26 pm	Classic	✓
Salesforce Scheduler	LightningScheduler	Set up personalized appointment scheduling.	04/03/2023, 2:28 pm	Lightning	✓
Service	Service	Manage customer service with accounts, contacts, cases, and more.	04/03/2023, 2:26 pm	Classic	✓
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records.	04/03/2023, 2:26 pm	Lightning	✓
Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop editor.	04/03/2023, 2:26 pm	Classic	✓
Subscription Management	RevenueCloudConsole	Get started automating your revenue processes.	04/03/2023, 2:26 pm	Lightning	✓

Milestone 5 - Fields

Activity 1: LEAD



The screenshot shows the Salesforce Object Manager interface for the 'lead' object. The left sidebar contains a list of tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area displays the 'Fields & Relationships' tab, showing a table of 7 items, sorted by Field Label. The table columns are Field Label, Field Name, Data Type, Controlling Field, and Indexed. The table lists fields like Created By, Email, Last Modified By, lead, lead Name, Owner, and phone.

Field Label	Field Name	Data Type	Controlling Field	Indexed
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		✓
Last Modified By	LastModifiedById	Lookup(User)		
lead	lead__c	Auto Number		✓
lead Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
phone	phone__c	Phone		✓

Activity 2: BUY

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buy | Salesforce x - Student x Property_Management_App x Login | Salesforce x asynconf - Salesforce IN x

governmentartsandscience-7a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00003H1Ex/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
buy

Details

Fields & Relationships
10 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 Amount	Annual_Amount__c	Currency(18, 0)		
buy	buy__c	Picklist		
buy Name	Name	Text(80)		✓
City	City__c	Picklist		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

https://governmentartsandscience-7a-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0112w00003H1Ex/FieldsAndRelationships/view

Type here to search

08:30 14-04-2023

buy | Salesforce x - Student x Property_Management_App x Login | Salesforce x asynconf - Salesforce IN x

governmentartsandscience-7a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00003H1Ex/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
buy

Details

Fields & Relationships
10 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		
buy Name	Name	Text(80)		✓
City	City__c	Picklist		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Property	Property__c	Picklist		
state	state__c	Picklist	City	

List View Button Layout

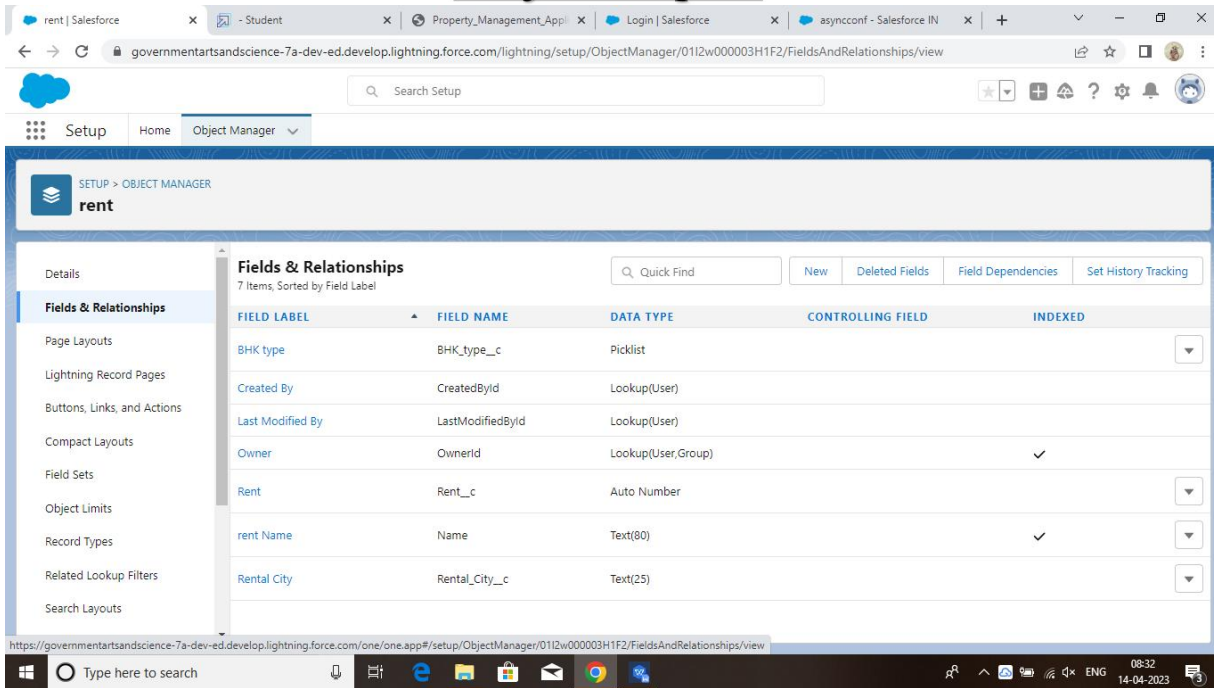
3 new notifications

Type here to search

08:30 14-04-2023

Activity 3:RENT

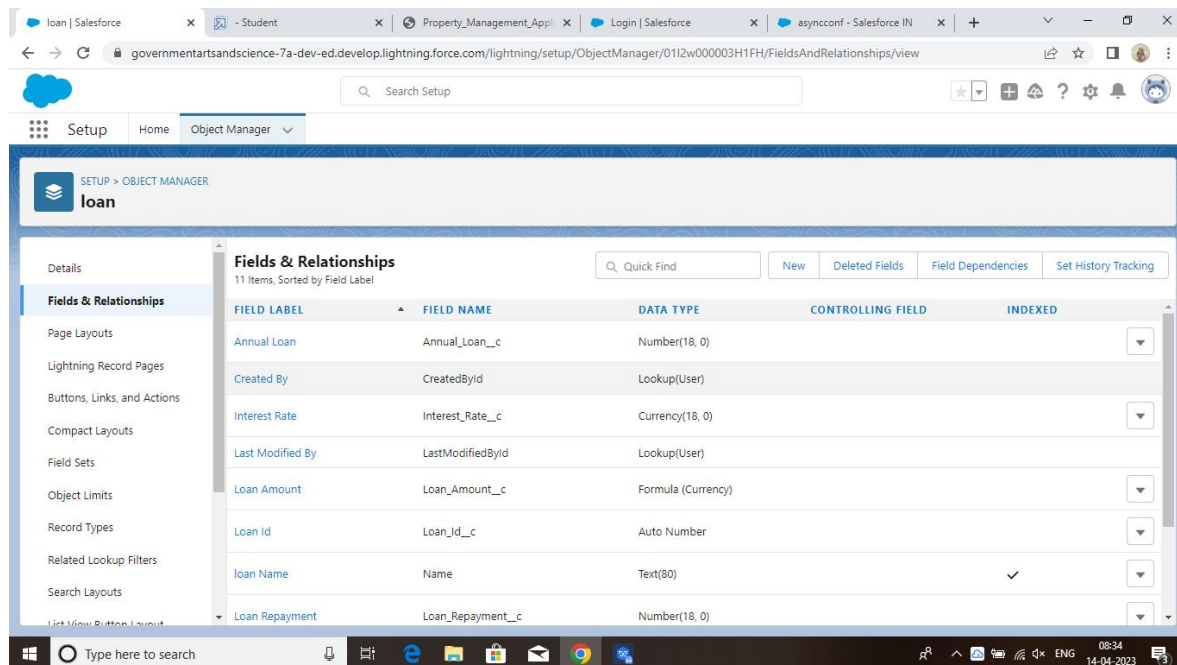
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The screenshot shows the Salesforce Object Manager interface for the 'rent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays the 'Fields & Relationships' section for the 'rent' object, showing 7 items sorted by Field Label. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK type	BHK_type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent	Rent__c	Auto Number		
rent Name	Name	Text(80)		✓
Rental City	Rental_City__c	Text(25)		

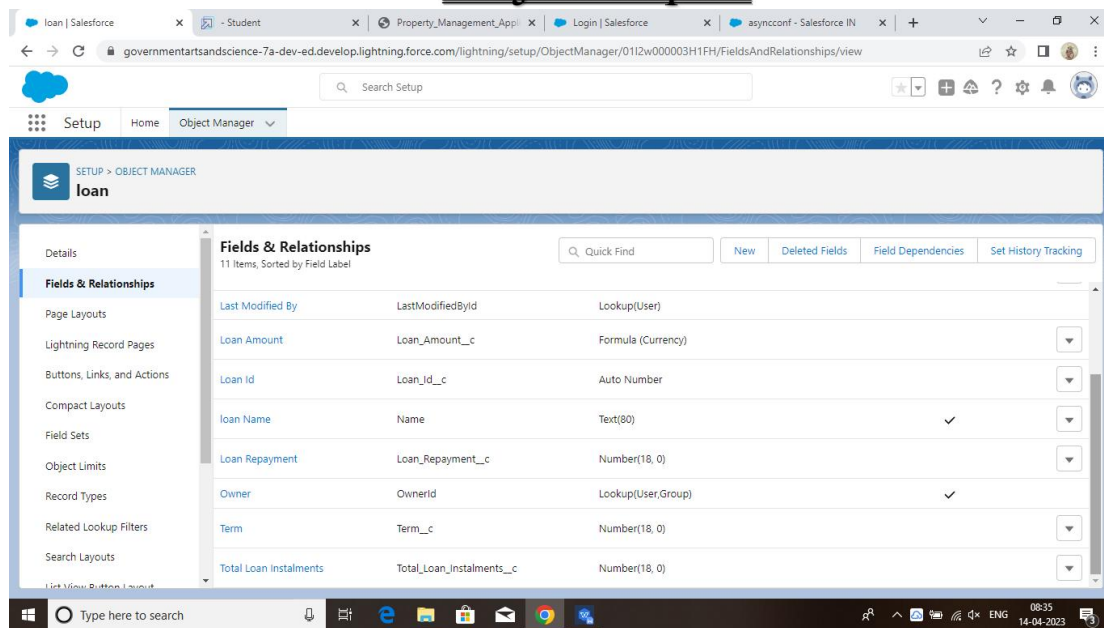
Activity 4: LOAN



The screenshot shows the Salesforce Object Manager interface for the 'loan' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays the 'Fields & Relationships' section for the 'loan' object, showing 11 items sorted by Field Label. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan Id	Loan_Id__c	Auto Number		
loan Name	Name	Text(80)		✓
Loan Repayment	Loan_Repayment__c	Number(18, 0)		

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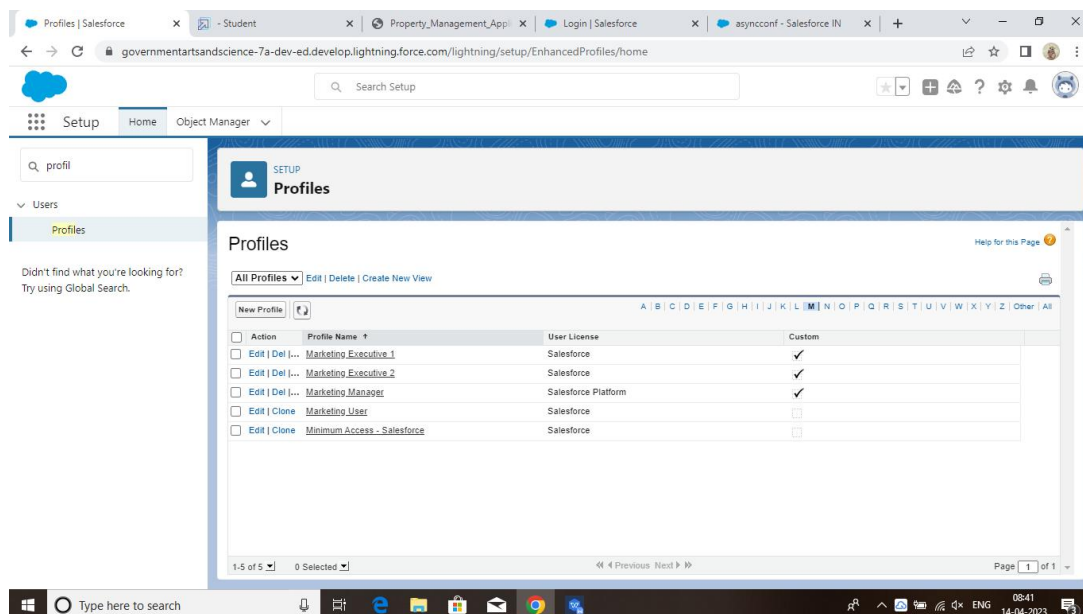


The screenshot shows the Salesforce Setup interface for the 'loan' object. The 'Fields & Relationships' tab is selected, displaying a list of 11 fields. The fields are sorted by label and include details such as the field name, API name, data type, and length. The 'loan Name' field is highlighted.

Field Name	API Name	Data Type	Length
Last Modified By	LastModifiedById	Lookup(User)	
Loan Amount	Loan_Amount__c	Formula (Currency)	
Loan Id	Loan_Id__c	Auto Number	
loan Name	Name	Text(80)	
Loan Repayment	Loan_Repayment__c	Number(18, 0)	
Owner	OwnerId	Lookup(User,Group)	
Term	Term__c	Number(18, 0)	
Total Loan Instalments	Total_Loan_Instalments__c	Number(18, 0)	

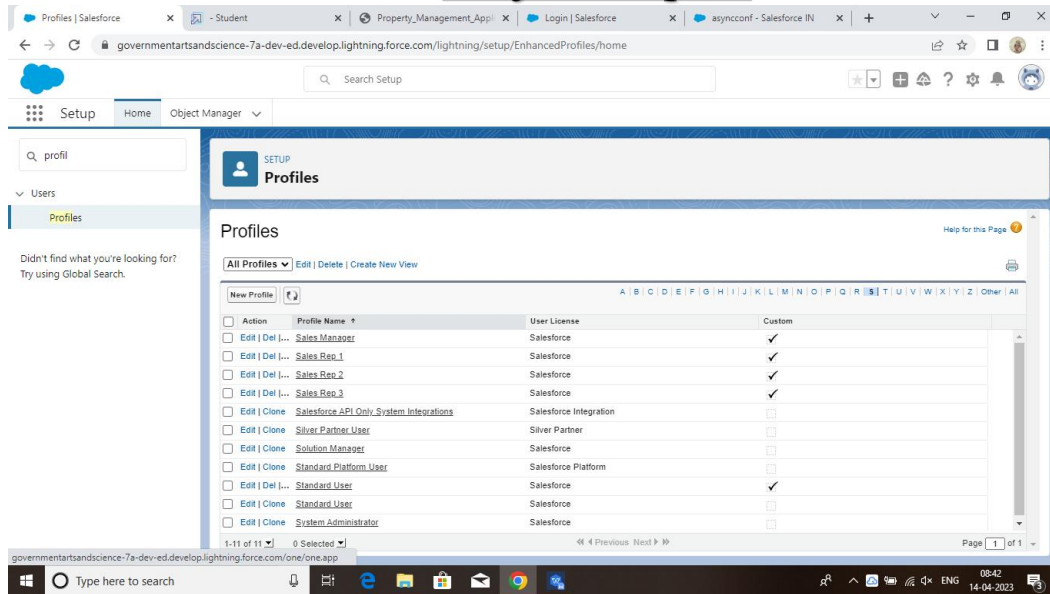
Milestone 6: Profile

Activity 1:



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Profiles' tab is selected, displaying a list of profiles. The profiles are sorted by name and include details such as the profile name, user license, and custom permissions. The 'Marketing Executive 1' profile is highlighted.

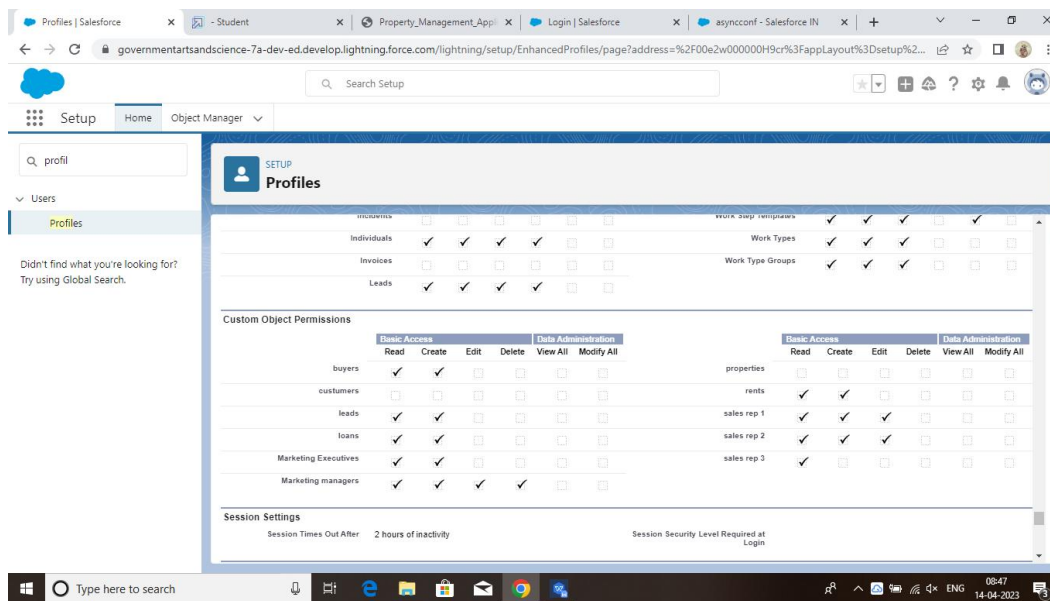
Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Marketing Executive 1	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Marketing Executive 2	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Marketing Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>



The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains a search bar and a navigation menu with 'Users' and 'Profiles'. The main content area is titled 'Profiles' and includes a 'New Profile' button and a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column contains checkboxes for various permissions.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit <input type="checkbox"/> Del ...	Sales Manager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Del ...	Sales Rep 1	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Del ...	Sales Rep 2	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Del ...	Sales Rep 3	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Del ...	Standard User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	System Administrator	Salesforce	<input type="checkbox"/>

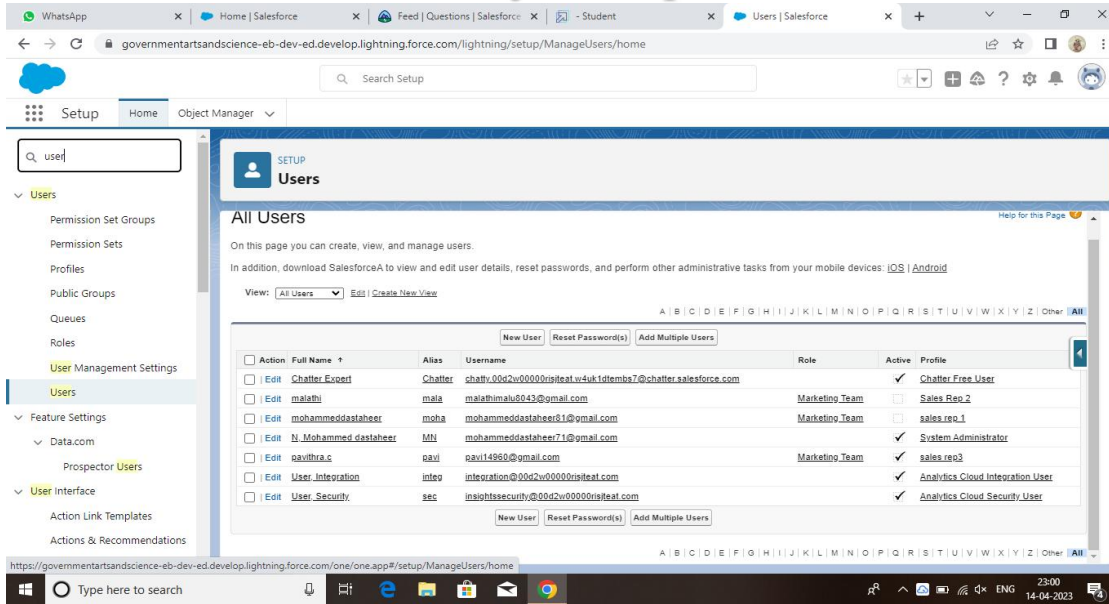
Activity 2:



The screenshot shows the Salesforce Setup interface for Profiles, specifically the 'Custom Object Permissions' section. The left sidebar is the same as the previous screenshot. The main content area is titled 'Profiles' and includes a table of permissions for various objects. The table has columns for 'Basic Access' and 'Data Administration'.

Object	Read	Create	Edit	Delete	View All	Modify All
buyers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
loans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Executives	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
rents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
sales rep 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
sales rep 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
sales rep 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

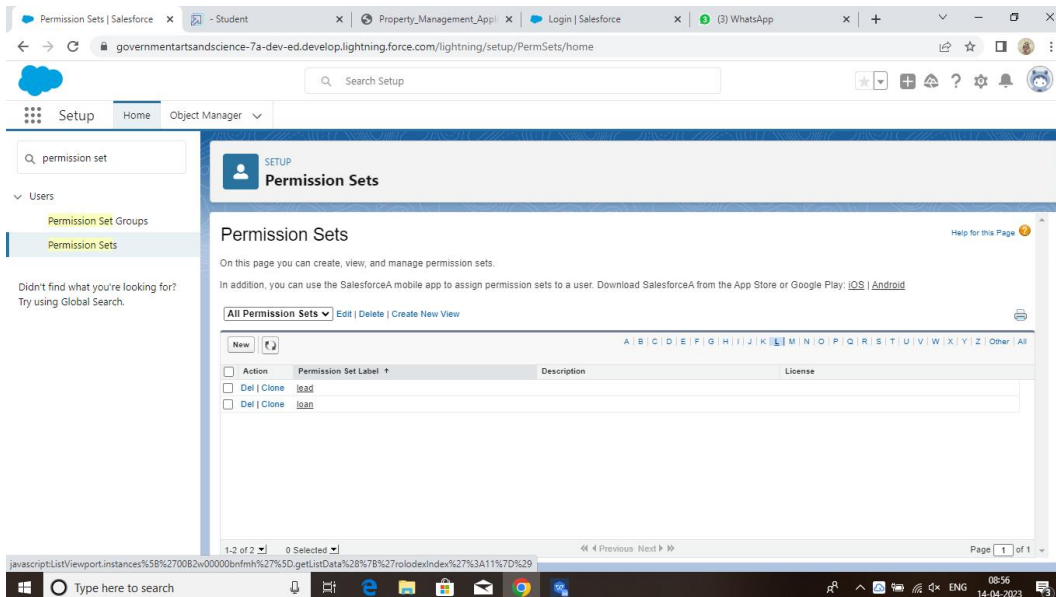
Milestone 7: New User



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

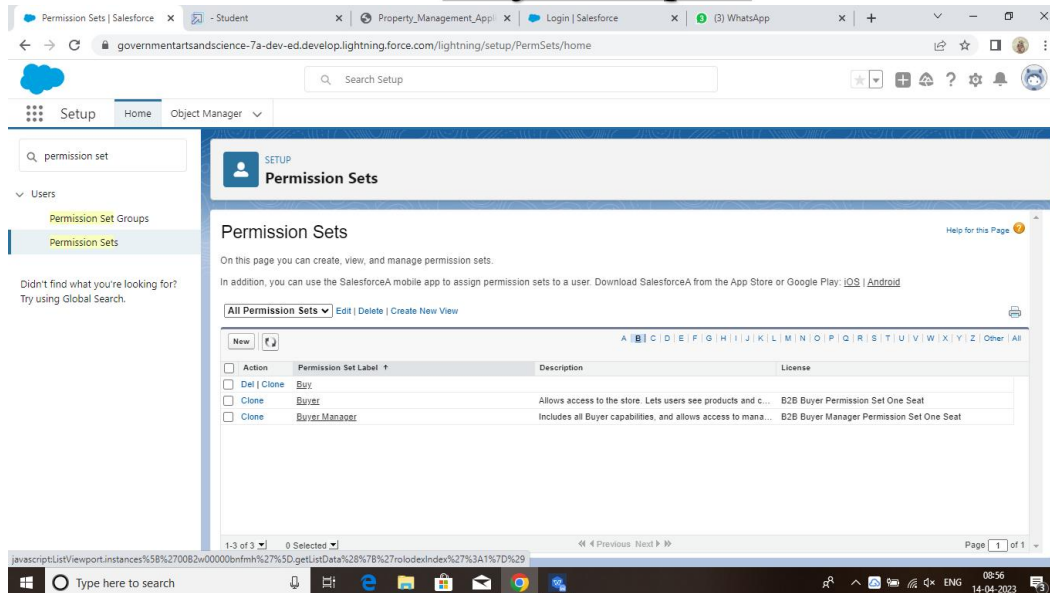
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d2v00000000000@chat.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	malathi	malathi	malathimau0043@gmail.com	Marketing Team	<input type="checkbox"/>	Sales Rep 2
<input type="checkbox"/> Edit	mohammeddasthaeer	moha	mohammeddasthaeer81@gmail.com	Marketing Team	<input type="checkbox"/>	Sales Rep 1
<input type="checkbox"/> Edit	N. Mohammed dasthaeer	MN	mohammeddasthaeer71@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	pavithra.c	pavi	pavithra0000@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Sales Rep 3
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2v00000000000@chat.salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2v00000000000@chat.salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone 8: Permission Set

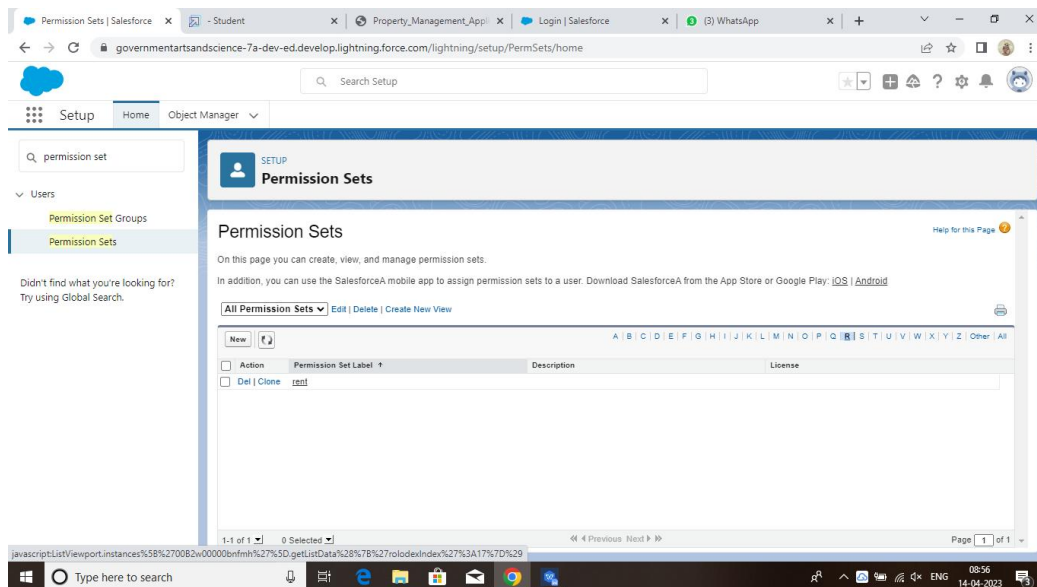


The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'Permission Sets' and includes a search bar, a 'View' dropdown set to 'All Permission Sets', and a table of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The permission sets listed are:

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del Clone	lead		
<input type="checkbox"/> Del Clone	loan		



The screenshot shows the Salesforce 'Permission Sets' setup page. The left sidebar contains a search bar and a navigation menu with '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 with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists three permission sets: 'Buy', 'Buyer', and 'Buyer Manager'. The 'Buyer Manager' permission set is highlighted. The bottom of the page shows a Windows taskbar with the date 14-04-2023 and time 08:56.

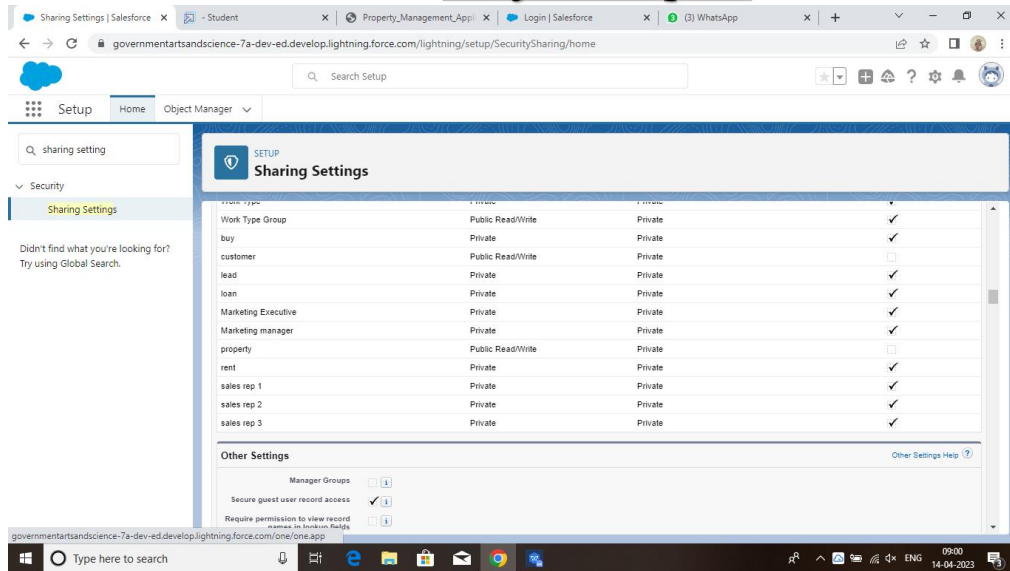


This screenshot is identical to the one above, showing the Salesforce 'Permission Sets' setup page. It displays the same sidebar, main content area with instructions and a table of permission sets, and the Windows taskbar at the bottom.

Milestone 9: setup For OWD

Activities:

Project Report



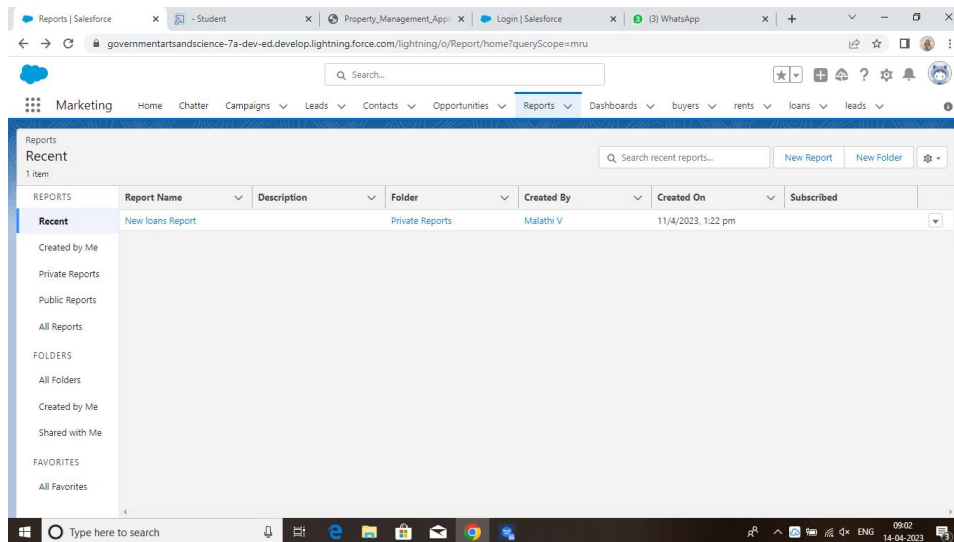
The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar contains a search bar and a navigation menu with 'Security' and 'Sharing Settings' (highlighted). The main content area is titled 'Sharing Settings' and contains a table of sharing settings for various object types. Below the table is a section for 'Other Settings' with checkboxes for 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record'.

Object Type	Sharing Model	Controlled By	Visible
Work Type Group	Public Read/Write	Private	✓
buy	Private	Private	✓
customer	Public Read/Write	Private	✓
lead	Private	Private	✓
loan	Private	Private	✓
Marketing Executive	Private	Private	✓
Marketing manager	Private	Private	✓
property	Public Read/Write	Private	✓
rent	Private	Private	✓
sales rep 1	Private	Private	✓
sales rep 2	Private	Private	✓
sales rep 3	Private	Private	✓

Other Settings

- Manager Groups: ☐ [Help](#)
- Secure guest user record access: ☒ [Help](#)
- Require permission to view record: ☐ [Help](#)

Milestone 10 - Report

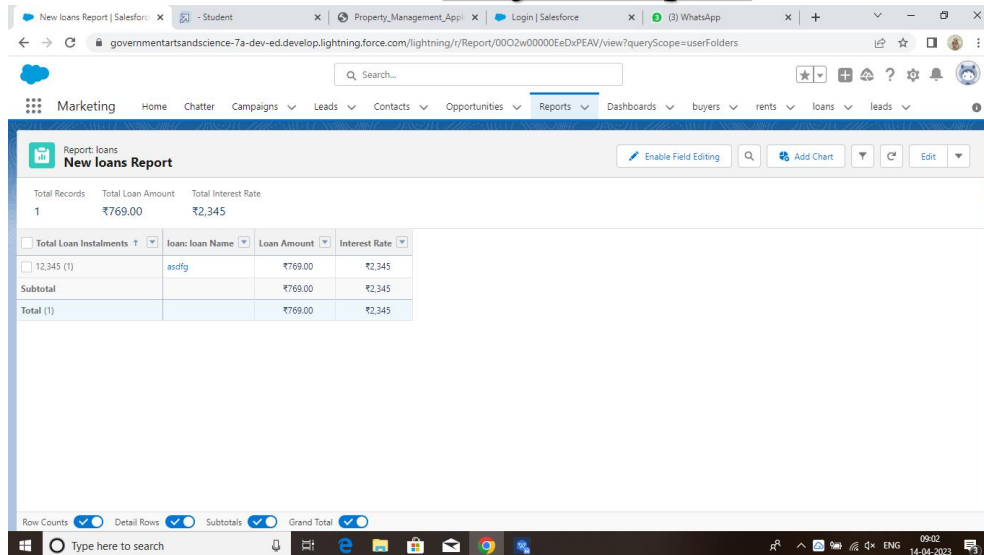


The screenshot shows the Salesforce Reports page. The left sidebar contains a search bar and a navigation menu with 'Reports' (highlighted). The main content area is titled 'Recent Reports' and contains a table of recent reports. Below the table is a section for 'Other Settings' with checkboxes for 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Loans Report		Private Reports	Malathi V	11/4/2023, 1:22 pm	Subscribed

Other Settings

- Manager Groups: ☐ [Help](#)
- Secure guest user record access: ☒ [Help](#)
- Require permission to view record: ☐ [Help](#)



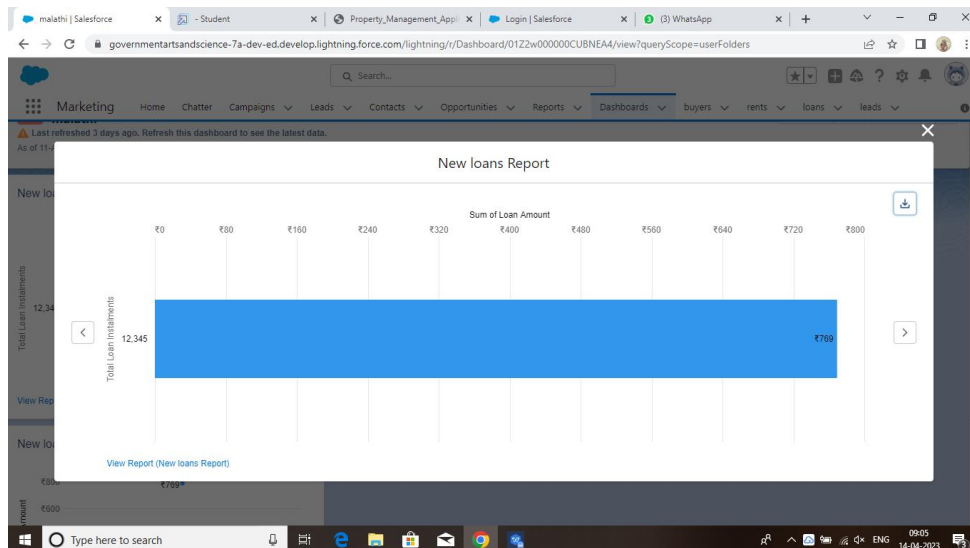
Report: loans
New loans Report

Total Records: 1 Total Loan Amount: ₹769.00 Total Interest Rate: ₹2,345

Total Loan Instalments ↑	loan: loan Name ↓	Loan Amount ↓	Interest Rate ↓
12,345 (1)	asdfg	₹769.00	₹2,345
Subtotal		₹769.00	₹2,345
Total (1)		₹769.00	₹2,345

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

Milestone 11: Dashboards



4. Trailhead profile public URL

Team Lead - <https://trailblazer.me/id/malav84>

Team Member 1 - <https://trailblazer.me/id/mohan850>

Team Member 2 - <https://trailblazer.me/id/pavim47>

Team Member 3 – <https://trailblazer.me/id/pavic15>

5. Advantages and disadvantages

Advantages

Whether it's a multistory hotel in a busy market or a small property in a beautiful rural town, using a property management system has many advantages. You'll be able to streamline your operations, offer comprehensive training to your staff and ensure guests have a positive, stress-free experience.

You can access your information from anywhere

A major advantage of a property management system in a hotel is having access to all of your information in one place, whether you're onsite, at home or out of town. Because many property management systems operate via the cloud, you'll have access to your information through all your devices. From a computer, tablet or smartphone, you'll be able to pull up information in real-time, including inventory, revenue, personnel information, accounts payable and receivable and more.

Being able to manage from anywhere means you'll be able to boost your sales on the fly. Just heard about a music festival in town that's sure to draw a crowd? Log into the property management system and adjust your rates to take advantage of early bookings and foot traffic on the day of the event. Increased traffic means you may need to increase staff – the property management system allows you to revise the employee schedule at any time.

You'll save time and money by being more efficient

The number one job of an employee in the hospitality industry is to provide excellent customer service to guests. When employees spend hours on routine tasks such as reservation management, scheduling, housekeeping assignments, maintenance requests and other manual administrative tasks, guest services can suffer.

A property management system is integrated into every department within a hotel, allowing you to communicate effectively with both employees or outside contractors while keeping an eye on revenue, inventory, or sales. Automating routine tasks can save time for both you and your employees – housekeeping assignments, maintenance requests, reservation manifests and nightly audits are available at the touch of a button.

Project Report

Without having to spend time shuffling papers and manually documenting every leaky faucet or burned out light bulb, your frontline employees can focus on providing top-notch customer service to your guests.

Guest satisfaction may increase with a smooth check-in process

No one wants to arrive at their hotel after a long day of traveling only to be greeted with an awkward or burdensome check-in process. A property management system provides a single, efficient check-in procedure, requiring each of your employees to follow the same streamlined process. Your front desk will be able to handle both individual guests and tour bus rushes with ease, ensuring that each guest walks to his or her room with a positive first impression of your hotel.

You'll increase bookings by refining your online presence

While the face of your hotel may be your front line staff, your guests' first impression of your property is often what they see and read online. One of the most effective benefits of a property management system in a hotel is the ability to integrate the software with your existing website. Services such as a direct booking engine, a 24-hour chat assistant or online concierge services add value to the guest experience from the first point of contact. Automating these tasks also means your employees are spending time taking care of guests.

You don't only depend on your own website for sales, however. There are a variety of third-party booking sites – think booking.com or hotels.com – offering rooms to potential guests. Your property management system allows you to manage your inventory across many different platforms using one simple application. Not only does this function allow you to shift inventory to meet demand, it can also prevent duplication errors that sometimes occur when manually processing reservations.

You can optimize your revenue stream using built-in pricing tools

Most hotels change rates twice per year – peak occupancy season and low season. While it may be less time-consuming, you're also missing out on a lot of revenue. Selecting a property management system with built-in pricing tools can increase your revenue by allowing you to set several rate options, including weekend fluctuations, special event pricing, promotional offers, package rates, valued customer deals and group sales options.

Personal benefits :

- Less stress - By hiring a specialist, you won't have to deal with late-night emergencies, evictions, chasing down rent, damages, paperwork, having to find contractors, and other tedious and time-consuming tasks.

Project Report

- More freedom - If you hire a property manager, you can travel anywhere you want without having to worry about your tenants and about the regular inspections. You can live wherever you want and you can invest in other properties.
- More free time - For a property investor, time is money, and your time would be better spent doing other things than micromanaging a property. If you focus on asset management, then you are working on growing your business, if you manage the properties yourself, then you work in it. Not to mention that you will also have more time to spend with your family and friends.

For more helpful advice on getting the most out of your property investment, sign up to our monthly newsletter.

Disadvantages

While a property management system may ultimately help your business run more smoothly, it's important to consider the disadvantages to determine if it's right for your property before investing.

You'll be dependent on one vendor

Property management systems allow you to connect every aspect of your business through one application. However, this may make it more difficult to use other third-party products that may be more useful to your business, such as payroll or accounting programs.

While some property management systems may allow integration with third-party products, the implementation is not always smooth and may cause both products to have operational issues. You may need to purchase additional products later if you want to add services that your software vendor doesn't offer, such as self-check-in kiosks, email marketing databases or guest communication platforms. If you choose different vendors for these products, you'll be back to managing several different systems instead of one property management solution.

Cost can be prohibitive in the beginning

If you're a small, family-owned business in a non-tourist destination, it can be difficult to come up with the cash for an all-in-one property management system right away. Over time, these solutions pay for themselves in saved time and increased bookings, but you'll want to make sure you choose the right product for your type of business.

Project Report

Because the software is often proprietary and may not accept or play well with other tech products, you may be forced to abandon your property management system if it doesn't work for you, or spend more money to find a more appropriate solution.

All-in-one is not always best.

For larger hotels, relying on property management software that claims to do everything can be a hassle and may actually require you to purchase other products or services. Software products usually perform one to three core functions very well. For instance, your chosen property management system may do a very good job of collecting and organizing bookings, assigning staff and keeping an up-to-date, rotating log of maintenance requests.

However, the same system may not have an optimal accounting program, or may not have a marketing function at all. If these functions are essential to your business – and they often are for very large or very busy properties – you'll need to either purchase additional software or hire additional staff to ensure these functions are working properly.

Your Bottom Line

While the benefits of a property management system in a hotel often outweigh the potential negatives, it's important to thoroughly consider your business procedures and plans for future growth before investing in the software. While expense may be an initial concern, the software generally pays for itself very quickly if you are able to take advantage of all the revenue-increasing tools it provides.

6. Applications

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. A property management system is sometimes referred to as a hotel operating system or hotel OS.

PMS provides a centralized computer system to organize, schedule and perform the day-to-day functions and transactions involved in accommodations businesses. Computer record keeping and PMS have increased the efficiency of hospitality industries significantly simply by making it possible to update and consult centralized records from multiple computers and devices. PMS solutions have been customized for the needs of the hospitality industry to further increase ease of operations.

Project Report

Functions managed by a PMS include automation of many common tasks, including:

- Bookings
- Check-in and check-out
- Telephone systems integration
- Point of sale (POS) integration
- Event planning
- Food and beverage costing
- Hotel inventory supply management
- Reporting of key performance indicators (KPI)
- Security and room locks

Local governments sometimes use PMS to manage numerous properties under their care, where centralized and electronic record keeping greatly increases efficiency. Facilities might include schools, sports and recreational facilities, community gardens and parks. In manufacturing, PMS is often used to keep track of materials and supplies, as well as employee-owned property and equipment.

7. Conclusion

The purpose of sales force training is to make salespeople successful. Training programs need to change as capability gaps arise. A significant capability gap exists when a candidate is hired, and so most organizations have training programs for new salespeople. Changes in selling environments frequently induce capability gaps that require that a company modify its selling strategy and selling process. Too many companies are slow to make this adjustment. The training and development review process developed in this chapter can diagnose when and what training program change initiatives are necessary for enhanced sales force effectiveness.

Changing the sales force structure presents many challenges. However, sales managers should not be afraid to change a structure that is outdated. As stated earlier, progressive sales managers reevaluate the sales force structure every two to three years.

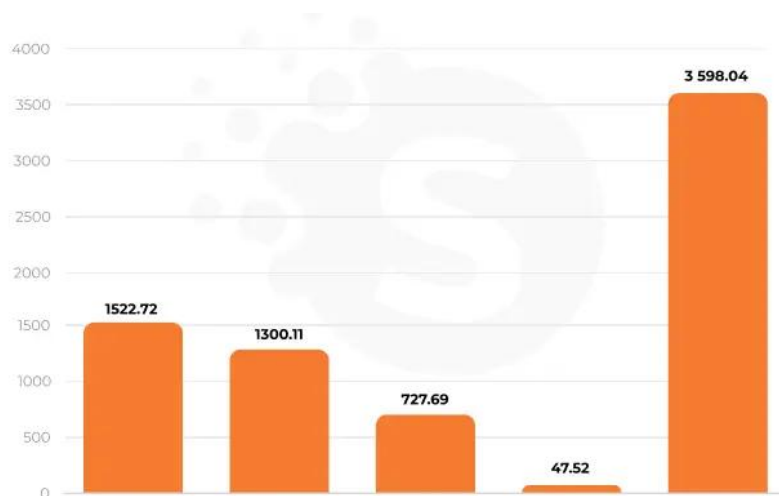
Project Report

Even three years may be too long given how quickly the Internet is changing the selling landscape.

The sales force structure is a critical decision. It affects how customers see the firm. Will they see generalists or specialists, place orders via the Internet, or receive phone calls? The structure determines the selling skills and level of knowledge required of the sales force. This in turn affects recruitment, training, and coaching. Finally, the structure affects each salesperson.

8. Future scope

Real estate technology has been rapidly evolving in recent years, and the introduction of cutting-edge technologies in real estate promises to change the way business is conducted in this age-old industry. The real estate market is a major component of the world's economy, with a global value of over \$7 196 billion.



some respects, the adoption of technology in real estate has lagged behind its use in other business sectors. It was partially due to a reluctance to change methods that had worked well in the past. Another factor that slowed down the widespread use of real estate technology was major players' attempts to develop proprietary real estate technology tools.

Project Report

But now, these issues are fading, and the market has seen an increase in real estate tech in recent years.

Moreover, the industry players are starting to understand the benefits of investing and using modern technologies. According to the **Technology and The Future of Real Estate Investment Management** report created by the University of Oxford, in 2020, 53% of digital real estate companies are now directly investing in technology. 42% of Statista respondents confessed they see potential in Smart Building technologies, while 56% of respondents have already noticed the impact from the tech sphere.

ANUAL PLANNED TECHNOLOGY SPEND BY SIZE



It is poised to see even more growth in how new technologies are genuine real estate disruptors and will affect everyone involved in the industry.

So if you want to learn more about the state of the real estate industry after the pandemic, technology trends in real estate for 2023, and software development trends in real estate based on Softermii's experience in creating successful real estate technology solutions such as Rently, Real Estate Association, Proper and Apartmii, read on!