

PROJECT REPORT TEMPLATE
PROPERTY MANAGEMENT APPLICATION
USING SALESFORCE
TEAM ID : NM2023TMID18316

1. INTRODUCTION

1.1 Overview :

A property management application built on the Salesforce platform can help property managers streamline their operations, improve tenant communication, and increase revenue.

1.2 Purpose :

The purpose of a property management application using Salesforce is to provide property managers with a comprehensive and efficient tool to manage their properties, tenants, leases, maintenance requests, and other related tasks. By leveraging the power of the Salesforce platform, property managers can automate many of their manual processes, reduce errors, and improve overall operational efficiency.

This involves using Salesforce's powerful tools and features to track and manage everything related to a company's real estate holdings, including properties, tenants, leases, maintenance schedules, and more.

2. Problem Definition & Design Thinking

2.1 Empathy map :

An empathy map is a collaborative visualization used to articulate what we know about a particular type of user. It externalizes knowledge about users in order to

- 1) create a shared understanding of user needs, and
- 2) aid in decision making

EMPATHY MAP

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DATE:	21.03.2023
NAME:	JANAKIRAMAN.P



Empathy map

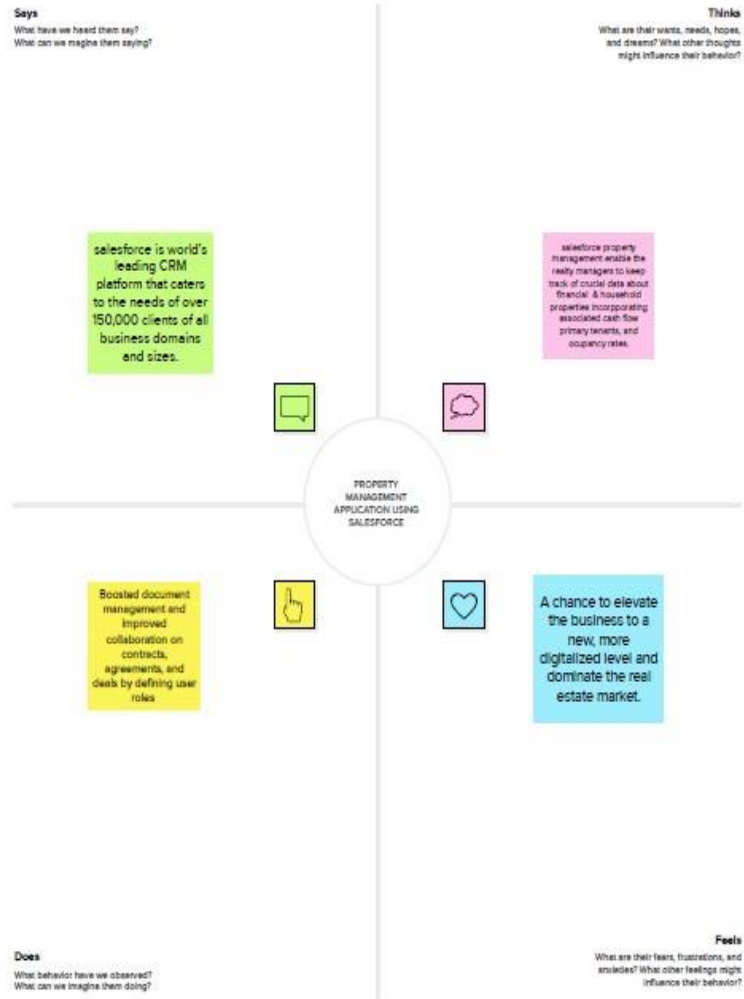
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

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Build empathy

The information you add here should be representative of the observations and research you've done about your users.



Need some inspiration?

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

[Open example](#)



2.2 Brainstorming :

Brainstorming is a group problem-solving method that involves the spontaneous contribution of creative ideas and solutions. This technique requires intensive, freewheeling discussion in which every member of the group is encouraged to think aloud and suggest as many ideas as possible based on their diverse knowledge.

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Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts when it's not sitting in the same room.

- 10 minutes to prepare
- 1 hour to ideate
- 1-2 days to implement

Before you collaborate

1. Get a list of potential ideas to bring up with the team. Have what you need to get going.

2. 10 minutes

3. Get going

4. Get going

5. Get going

6. Get going

7. Get going

8. Get going

9. Get going

10. Get going

Define your problem statement

What problem are you trying to solve? Frame your problem as a pain point for the customer. It should be the focus of your brainstorm.

1. 10 minutes

2. 10 minutes

3. 10 minutes

4. 10 minutes

5. 10 minutes

6. 10 minutes

7. 10 minutes

8. 10 minutes

9. 10 minutes

10. 10 minutes

Brainstorm

With clear ideas that come to mind, brainstorm your problem statement.

1. 10 minutes

2. 10 minutes

3. 10 minutes

4. 10 minutes

5. 10 minutes

6. 10 minutes

7. 10 minutes

8. 10 minutes

9. 10 minutes

10. 10 minutes

Group ideas

Now that you have your ideas, it's time to group them. Group ideas into clusters that are related to each other. This helps to organize your ideas and makes it easier to see the big picture.

1. 10 minutes

2. 10 minutes

3. 10 minutes

4. 10 minutes

5. 10 minutes

6. 10 minutes

7. 10 minutes

8. 10 minutes

9. 10 minutes

10. 10 minutes

Prioritize

Now that you have your ideas, it's time to prioritize them. Use the following criteria to rank your ideas: impact, effort, and risk. This helps to identify the most important ideas to focus on.

1. 10 minutes

2. 10 minutes

3. 10 minutes

4. 10 minutes

5. 10 minutes

6. 10 minutes

7. 10 minutes

8. 10 minutes

9. 10 minutes

10. 10 minutes

After you collaborate

Now that you have your ideas, it's time to implement them. Use the following steps to get started: 1. Get a list of potential ideas to bring up with the team. 2. Have what you need to get going. 3. Get going. 4. Get going. 5. Get going. 6. Get going. 7. Get going. 8. Get going. 9. Get going. 10. Get going.

1. 10 minutes

2. 10 minutes

3. 10 minutes

4. 10 minutes

5. 10 minutes

6. 10 minutes

7. 10 minutes

8. 10 minutes

9. 10 minutes

10. 10 minutes

Mobile app icon

Mobile app icon

Mobile app icon

Mobile app icon

RESULT

3.1 Data Model :

Object name		Field label	Data type
1 2	Lead	Lead	Auto-Number
	Buy	Buy	Picklist
3 4	Rent	Rent	Auto-Number
	Loan	Loan	Auto- Number

3.2 Activity & Screenshort :

salesforce

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Search...

Search

JANAKIRAMAN P

Setup

Help

Content

Home

Chatter

Libraries

Content

Subscriptions

Buyers

Rents

Loans

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Tell Me More

Check Readiness

Quick Find / Search

Expand All | Collapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce

Get Started

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Data Classification

Privacy Center

Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Outlook Integration and Sync

Omni-Channel Integration and Sync

Email Administration

Google Apps

Analytics

Data.com Administration

Build

Customize

Create

Develop

Lightning Bolt

Schema Builder

Lightning App Builder

Canvas App Previewer

Installed Packages

Package Usage

AppExchange Marketplace

Deploy

Deployment Settings

Deployment Status

Monitor

System Overview

Optimizer

Imports

Outbound Messages

Time-Based Workflow

Automated Process Actions

Case Escalations

Event-driven Processes

API Usage Notifications

Mass Emails

Email Snapshots

Jobs

Logs

Getting Started

Dismiss

Build App

Generate a basic app with just one step, and then easily extend that app with click or code.

Add App

Salesforce Lightning

Turn on the power, speed, and simplicity of the new Salesforce user experience

Get Started

System Overview

Expand

You have an message

Expand to see messages or go to the system overview page to see additional limits.

Recent Items

Refresh

Name	Type	Object
Buy	Custom Object Definition	
Rent	Custom Object Definition	
Lead	Custom Object Definition	
Loan	Custom Object Definition	
janakiraman.p	User	
permissions sets	Permission Set	
jayaprakash	Profile	
Insights	Custom App	
Collaboration	Custom App	

Quick Links

Tools

App Quick Start

Schema Builder

New custom object

Users

New user

Add multiple users

Reset user's password

App

Manage apps

Manage profiles

Enable Chatter feeds

Security

New profile

New permission set

Add roles

Data

Import accounts & contacts

Import custom objects

Mass delete records

Community

Dismiss

Help for this Page

Recommended Apps

Show All

FinancialForce Professional S...

FinancialForce

★★★★★ (114)

LATEST SUMMER RELEASE 22: Manage your professional services team, customer & projects &...

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3. TRAILHEAD PROFILE PUBLIC URL

Team Leader - <https://trailblazer.me/id/johnnandha>

Team Member 1 - <https://trailblazer.me/id/jayaprakash143m>

Team Member 2 - <https://trailblazer.me/id/kalae6>

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

4. ADVANTAGES & DISADVANTAGES

Advantages :

- Infinite customizability of the system
- Over 4,000 native integrations both free and paid
- Consolidated databases via integration of various data

sources to build a central tenants, or listings. database of accounts, properties,

- Data integration of various data sources

Disadvantages :

- Cost: Salesforce is a powerful and customizable platform, but it can be expensive to use. Building and maintaining a property

management application on Salesforce can require significant investment in development, customization, and ongoing support.

- Complexity: Salesforce is a complex platform, and developing a property management application .

5.

APPLICATIONS

1. Salesforce Service Cloud: Service Cloud is a customer service solution that can be customized for property management purposes. It includes features for managing tenant inquiries and requests, as well as tools for scheduling maintenance and repairs.
2. Lead Management: Property managers can use Salesforce to track leads, manage relationships, and communicate with potential tenants.
3. Lead Management: Property managers can use Salesforce to track leads, manage relationships, and communicate with potential tenants.

6.

CONCLUSION

In conclusion, using a property management application built on the Salesforce platform can provide significant benefits for businesses that manage real estate assets. Salesforce's centralized database, customization and flexibility, collaboration and communication tools, automation and efficiency features, and mobile access make it a powerful platform for managing all aspects of property management.

7.

FUTURE SCOPE

As the demand for any Salesforce job role is high, a certification equips you with specialized Salesforce requirements. The right Salesforce training props you ahead in a niche area where the scope for career growth and salary is sky-high.