

**PROJECT REPORT TEMPLATE**  
**PROPERTY MANAGEMENT APPLICATION**  
**USING SALESFORCE**  
**TEAM ID : NM2023TMID18414**

**1. INRODUCTION**

**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**

PROJECT NAME :	PROPERTY MANAGEMENT APPLICATION USING SALESFORCE
TEAM ID :	NM2023TMID18414
DATE:	12.04.2023
NAME:	MONIKHA.S



## 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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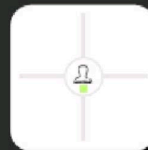
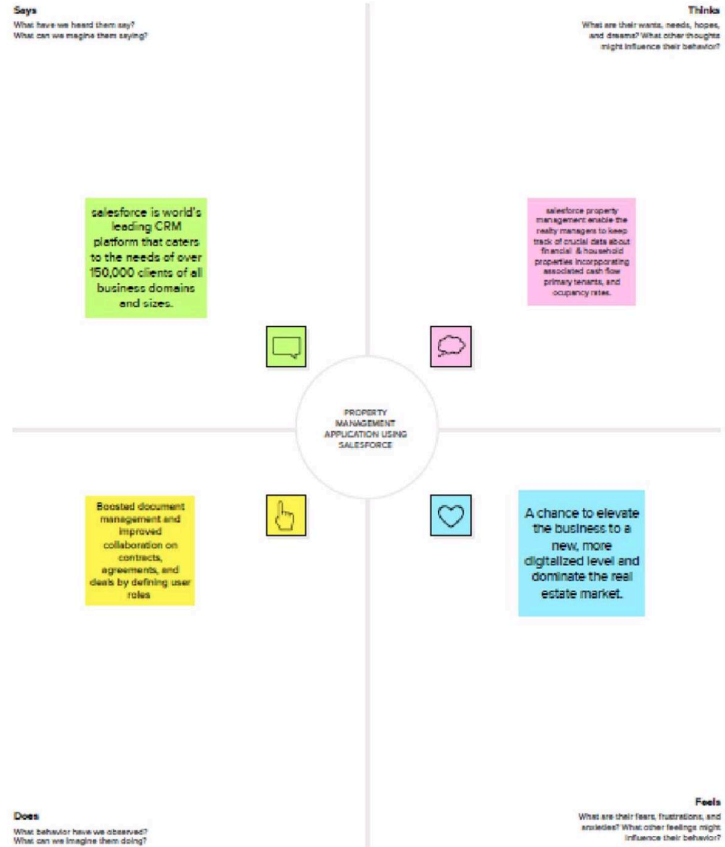
**Need some inspiration?**  
See a finished version of this template to kickstart your work.

[Open example](#)



### Build empathy

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



## 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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### 3. RESULT

#### 3.1 Data Model :

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

#### 3.2 Activity & Screenshort :



Search...

Search

Vignesh Elumalai

Setup

Help

Content

Home Chatter Libraries Content Subscriptions Buyers Rents Loans leads +

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### Lightning Experience Transition Assistant

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Get Started

### Salesforce Mobile Quick Start

Home

### Administer

- Release Updates
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- Data Management
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- Desktop Administration
- Outlook Integration and Sync
- Gmail 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
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- Time-Based Workflow
- Automated Process Actions
- Case Escalations
- Entitlement 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 clicks 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 a message.

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

### Recent Items

Name	Type	Object
Vignesh Elumalai	User	
Loan	Custom Object Definition	
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Rent	Custom Field Definition	Rent

### Quick Links

Tools	Users	App
App Quick Start	New user	Manage apps
Schema Builder	Add multiple users	Manage profiles
New custom object	Reset users' passwords	Enable Chatter feeds
Security	Data	
New profile	Import accounts & contacts	
New permission set	Import custom objects	
Add roles	Mass delete records	

### Community

Dismiss

#### Resources

Collaborate & Discuss  
Join the conversation.

#### User Groups

Connect with customers in your area.

#### Find Answers

Post your questions to the Community.

Ask a Question

#### Contribute Ideas

Share & vote for ideas to improve the product.

Post an Idea

Release Resources

Recommended Apps

Show All



Halo Insight - AI for any text...  
try halo insight  
★★★★★ (7)

Extract valuable insights from conversational data and improve your customer journey...



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Security Controls

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Communication Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Outlook Integration and Sync

Small Integration and Sync

Email Administration

Google Apps

Analytics

Data.com Administration

Build

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Interaction Log Layouts

Objects

Big Objects

Picklist Value Sets

Packages

Report Types

Tags

Service Cloud Launch Pad

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API Usage Notifications

Mass Emails

Email Snapshots

Jobs

Logs

Custom Object

lead

Standard Fields (1) | Custom Fields & Relationships (1) | Validation Rules (1) | Page Layouts (1) | Field Sets (1) | Compact Layouts (1) | Search Layouts (1) | Buttons, Links, and Actions (1) | Record Types (1) | Apex Sharing Reasons (1) | Apex Sharing Recalculation (1) | Object Limits (1)

Custom Object Definition Detail

Edit | Delete

Singular Label	lead	Description	
Plural Label	leads	Enable Reports	✓
Object Name	lead	Track Activities	✓
API Name	lead__c	Allow in Chatter Groups	✓
		Allow Sharing	✓
		Allow Bulk API Access	✓
		Allow Streaming API Access	✓
		Track Field History	✓
		Enable Licensing	✓
		Deployment Status	Deployed
		Allow Search	✓
		Help Settings	Standard Salesforce.com Help Window
		Modified By	Vignesh Elumalai, 29/03/2023, 2:52 pm
Created By	Vignesh Elumalai, 29/03/2023, 2:52 pm		

Standard Fields

Standard Fields Help

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	lead Name	Name	Text(80)		✓
Edit	Owner	owner	Lookup(UserGroup)		✓

Custom Fields & Relationships

New | Field Dependencies

Custom Fields & Relationships Help

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	lead	lead__c	Auto Number			Vignesh Elumalai, 29/03/2023, 2:54 pm
Edit   Del   Replace	Lead	state__c	Picklist			Vignesh Elumalai, 29/03/2023, 2:55 pm
Edit   Del   Replace	Lead	City__c	Picklist			Vignesh Elumalai, 29/03/2023, 2:56 pm
Edit   Del	Lead	Email__c	Email			Vignesh Elumalai, 29/03/2023, 2:57 pm
Edit   Del	Lead	Phone__c	Phone			Vignesh Elumalai, 29/03/2023, 2:58 pm

Related Lookup Filters

No related lookup filters defined.

Validation Rules

New

Validation Rules Help

No validation rules defined.

Triggers

New

Triggers Help

No triggers defined.

Page Layouts

New | Page Layout Assignment

Page Layouts Help

Action	Page Layout Name	Created By	Modified By
Edit   Del	lead Layout	Vignesh Elumalai, 29/03/2023, 2:52 pm	Vignesh Elumalai, 29/03/2023, 2:58 pm

Field Sets

New

Field Sets Help

No field sets defined.

Compact Layouts

New | Compact Layout Assignment

Compact Layouts Help

Action	Label	API Name	Primary	Modified By
	System Default	SYSTEM	✓	

Search Layouts

Search Layouts Help

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	lead Name		Vignesh Elumalai, 29/03/2023, 2:52 pm
Edit	Lookup Dialogs	lead Name	N/A	Vignesh Elumalai, 29/03/2023, 2:55 pm
Edit	Lookup Phone Dialogs	lead Name, Lead	N/A	Vignesh Elumalai, 29/03/2023, 2:52 pm
Edit	leads Tab	lead Name		Vignesh Elumalai, 29/03/2023, 2:51 pm
Edit	leads List View	N/A	New, Open in Quip, New From Document, Accept, Change Owner, Import, Change Owner, Printable View	Vignesh Elumalai, 29/03/2023, 2:52 pm
Edit	Search Filter Fields	N/A	N/A	Vignesh Elumalai, 29/03/2023, 2:52 pm

Buttons, Links, and Actions

New Action | New Button or Link

Buttons, Links, and Actions Help

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accept	Accept			Standard page		✓
Edit	Clone	Clone			Standard page		✓
Edit	Delete	Delete			Standard page		✓
Edit	Edit	Edit			Standard page		✓
Edit	leads Tab	Tab			Standard page		✓
Edit	List	List			Standard page		✓
Edit	New	New			Standard page		✓
Edit	View	View			Standard page		✓

Record Types

New | Page Layout Assignment

Record Types Help

No record types defined.

Apex Sharing Reasons

New

Apex Sharing Reasons Help

No Apex sharing reasons defined.

Apex Sharing Recalculation

New | Recalculate Apex Sharing

Apex Sharing Recalculation Help

No Apex sharing recalculations defined.

Object Limits

Object Limits Help

Item	Usage	Limit	% used	Message
Custom Fields	0	500	1%	
Custom Relationship Fields	0	40	0%	
Active Workflow Rules	0	50	0%	
Total Workflow Rules	0	500	0%	
Approval Processes	0	500	0%	
Active Lookup Filters	0	5	0%	
Active Validation Rules	0	100	0%	
VLOOKUP Functions	0	10	0%	
Sharing Rules (Both Owner- and Criteria-based)	0	300	0%	
Sharing Rules (Criteria-based Only)	0	50	0%	

Quick Find / Search

Expand All Collapse All



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## Salesforce Mobile Quick Start

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    - Big Objects
    - Picklist Value Sets
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    - Service Cloud Launch Pad
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## Custom Object

### Buy

Help for this Page

Standard Fields Help | Custom Fields & Relationships Help | Validation Rules Help | Page Layouts Help | Field Sets Help | Compact Layouts Help | Search Layouts Help | Buttons, Links, and Actions Help | Record Types Help | Apex Sharing Reasons Help | Apex Sharing Recalculation Help | Object Limits Help

#### Custom Object Definition Detail

Edit Delete

Singular Label Buy  
Plural Label buyers  
Object Name Buy  
API Name Buy\_\_c

Description  
Enable Reports ☒  
Track Activities ☒  
Allow in Chatter Groups ☒  
Allow Sharing ☒  
Allow Bulk API Access ☒  
Allow Streaming API Access ☒  
Track Field History ☒  
Enable Licensing ☒  
Deployment Status Deployed  
Help Settings ☒  
Modified By Vignesh Elumalai 29/03/2023, 3:16 pm

Created by Vignesh Elumalai 26/03/2023, 8:44 am

#### Standard Fields

Standard Fields Help

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
Edit	Buy Name	Name	Text(80)		<input checked="" type="checkbox"/>
Edit	Created By	CreatedBy	Lookup(User)		
Edit	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(UserGroup)		<input checked="" type="checkbox"/>

#### Custom Fields & Relationships

New Field Dependencies

Custom Fields & Relationships Help

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del   Replace	Buy	Buy__c	Picklist			Vignesh Elumalai 29/03/2023, 3:04 pm
Edit   Del	Buy	Discount__c	Percent(18, 0)			Vignesh Elumalai 29/03/2023, 3:07 pm
Edit   Del   Replace	Buy	State__c	Picklist			Vignesh Elumalai 29/03/2023, 3:18 pm
Edit   Del   Replace	Buy	City__c	Picklist			Vignesh Elumalai 29/03/2023, 3:19 pm

Deleted Fields (0)

#### Related Lookup Filters

No related lookup filters defined.

#### Validation Rules

New

Validation Rules Help

No validation rules defined.

#### Triggers

New

Triggers Help

No triggers defined.

#### Page Layouts

New Page Layout Assignment

Page Layouts Help

Action	Page Layout Name	Created By	Modified By
Edit   Del	Buy Layout	Vignesh Elumalai 26/03/2023, 8:44 am	Vignesh Elumalai 29/03/2023, 3:19 pm

#### Field Sets

New

Field Sets Help

No field sets defined.

#### Compact Layouts

New Compact Layout Assignment

Compact Layouts Help

Action	Label	API Name	Primary	Modified By
	System Default	SYSTEM	<input checked="" type="checkbox"/>	

#### Search Layouts

Search Layouts Help

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Buy Name		Vignesh Elumalai 26/03/2023, 8:44 am
Edit	Lookup Dialogs	Buy Name	N/A	Vignesh Elumalai 26/03/2023, 8:44 am
Edit	Lookup Phone Dialogs	Buy Name	N/A	Vignesh Elumalai 26/03/2023, 8:44 am
Edit	Buyers Tab	Buy Name	N/A	Vignesh Elumalai 26/03/2023, 8:44 am
Edit	Buyers List View	N/A	New, Open in Oup, New From Document, Accept, Change Owner, Import, Change Owner, Printable View	Vignesh Elumalai 26/03/2023, 8:44 am
Edit	Search Filter Fields		N/A	Vignesh Elumalai 26/03/2023, 8:44 am

#### Buttons, Links, and Actions

New Action New Button or Link

Buttons, Links, and Actions Help

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accept	Accept			Standard page		<input type="checkbox"/>
Edit	Buyers Tab	Tab			Standard page		<input type="checkbox"/>
Edit	Clone	Clone			Standard page		<input type="checkbox"/>
Edit	Delete	Delete			Standard page		<input type="checkbox"/>
Edit	Edit	Edit			Standard page		<input type="checkbox"/>
Edit	List	List			Standard page		<input type="checkbox"/>
Edit	New	New			Standard page		<input type="checkbox"/>
Edit	View	View			Standard page		<input type="checkbox"/>

#### Record Types

New Page Layout Assignment

Record Types Help

No record types defined.

#### Apex Sharing Reasons

New

Apex Sharing Reasons Help

No Apex sharing reasons defined.

#### Apex Sharing Recalculation

New Recalculate Apex Sharing

Apex Sharing Recalculation Help

No Apex sharing recalculations defined.

#### Object Limits

Object Limits Help

Item	Usage	Limit	% used	Message
Custom Fields	9	500	2%	
Custom Relationship Fields	0	40	0%	
Active Workflow Rules	0	50	0%	
Total Workflow Rules	0	500	0%	
Approval Processes	0	500	0%	
Active Lookup Filters	0	5	0%	



#### **4. TRAILHEAD PROFILE PUBLIC URL**

Team Leader – <https://trailblazer.me/id/monis284>

Team Member 1 - <https://trailblazer.me/id/rramkumar12>

Team Member 2 - <https://trailblazer.me/id/mohanapriya03>

Team Member 3 - <https://trailblazer.me/id/mugesh605>

#### **5. 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 .

## **6. 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.

## **7. 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.

## **8. 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.