

# **PROPERTY MANAGEMENT APPLICATION USING SALESFORCE**

Project Based Experimental Learning Program

**MINIPROJECT ON:**  
**PROJECT MANAGEMENT APPLICATION USING SALES FORCE**

**BACHELOR OF SCIENCE**

**IN**

**MATHEMATICS**

**BY**

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## **SYNOPSIS:**

- **INTRODUCTION**
- **NEEDS**
- **FEATURES OF PROPERTY MANAGEMENT**
- **IDEATION AND BRAINSTORMING**
- **RESULT**
- **ADVANTAGES & DISADVANTAGES**
- **APPLICATIONS**
- **FUTURE SCOPE**
- **CONCLUSION**

## **INTRODUCTION:**

A PMS Property Management Software" belongs to a family of real estate software solutions that operates locally to optimize business processes for enhanced performance and transparency on a device or server side. It's really the adviser-de-camp of land owners, property managers, and companies trying to simplify tasks that would require a huge amount of time and money.

These types of software solutions are not only intended for one specific category of specialists in the industry PMS can help your company to achieve a greater degree of accuracy and success even if you own rental property, commercial property, and have real estate investment.

## **NEEDS:**

### **Real Estate Investment Firms and Companies:**

Property management software does not only help landowners, it could also support real estate investment companies with substantial values. REITs and private equity companies can also use this enterprise solution

## **Commercial:**

Managers require software solutions that give them the capabilities to enhance their approach, improve analysis, and optimize the performance of their portfolios.

## **Retail:**

Building owners and managers of retail real estate businesses require unique enterprise solutions to improve their strategic thinking and performance analysis.

## **Tenants:**

While making maintenance requests, getting alerts about building changes, or incoming deliveries, and connecting with managers, tenants could use PMS "Property management software" through the use of a tenant portal.

## **Property owners and managers:**

To maximize their duties and operations, property owners of every form of rental can use property management software. All these properties can benefit from this real estate software.

# **FEATURES OF PROPERTY MANAGEMENT:**

## **Accounting:**

A financial module which will help you to deal with mortgages, transactions, banking information, debts, and plenty more can be incorporated with your property management software i centralizes all the activities to one location, stored safely and accessible with just few taps.

## **Communicating:**

You can contact tenants directly through text messages and by email using a designed in communication feature and functionality in your real estate software solution. You can even send messages separately or even in bulk, build groups and save the chat history inside the application.

## **Online payments:**

Integration of payments will help you mitigate the hours spent on billing and bring down the cost incurred on paper records and collect funds safely.

## **Maintenance Management:**

Property management software solutions enable support and maintenance requests to be handled, service providers and suppliers to be scheduled and tenants and property owners to communicate about scheduled maintenance tasks with great ease.

## **Space Management:**

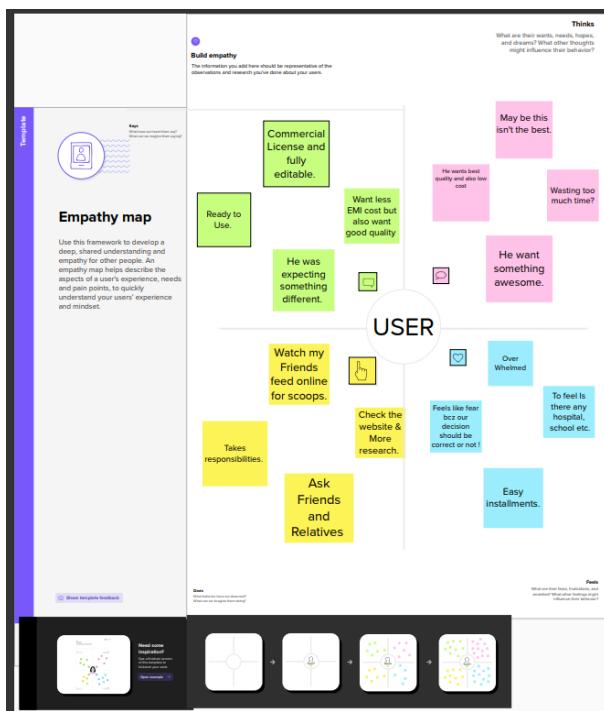
The space management feature and the functionality role in real estate software solutions simplify the allocation of resources, tracks and reports on the usage of space and materials and allows physical properties to be properly controlled

## **Document Management:**

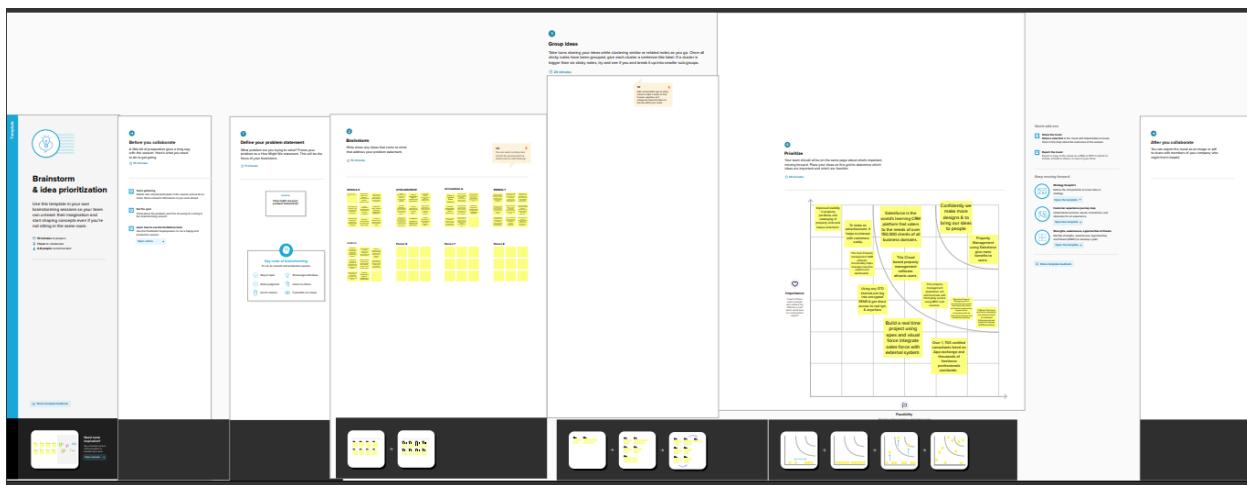
All the data about your property, land, tenants, and finances can be saved by your property management software. You can upload, import, and handle documents such as flow statements or lease rolls using a personalized solution.

# IDEATION AND BRAINSTORMING:

## EMPATHY MAP:

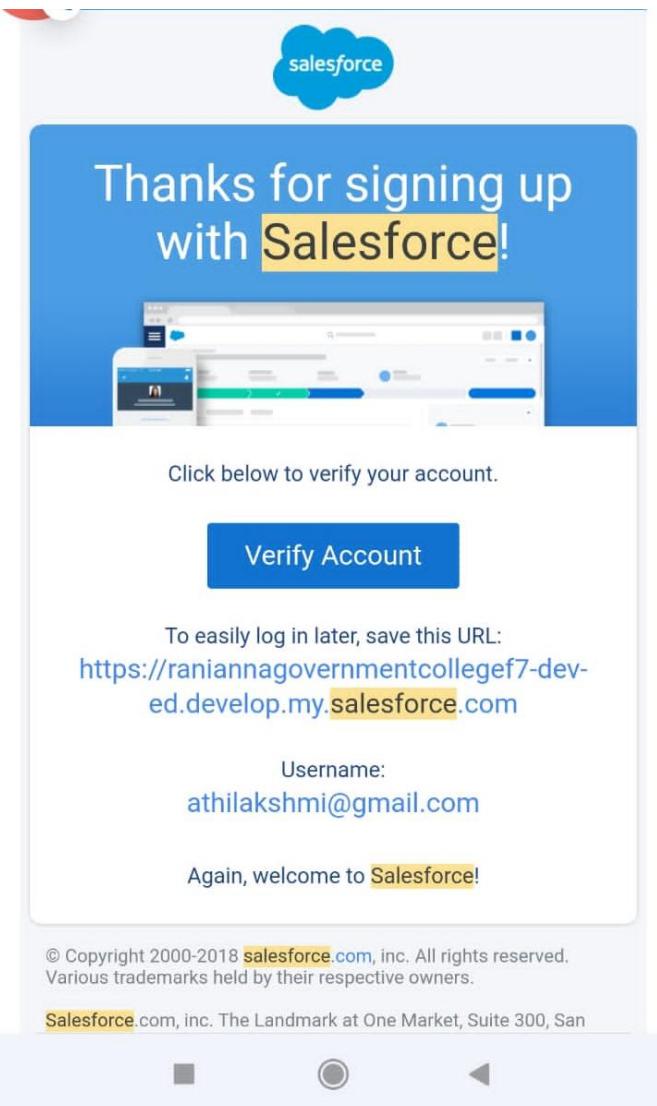


## BRAINSTORMING:



# RESULT:

## MILESTONE 01: Sales force



## MILESTONE 02: Object

The screenshot shows the Salesforce Setup interface with the title 'New Custom Object'. The URL in the browser is <https://raniannagovernmentcollege-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new>. The page is titled 'New Custom Object' under the 'Custom Object Definition Edit' section. It includes fields for 'Label' (Account), 'Plural Label' (Accounts), and 'Object Name' (Account). A 'Description' text area is also present. At the top right, there are 'Save', 'Save & New', and 'Cancel' buttons. A message bar at the top indicates that permissions are disabled by default. The system status bar at the bottom shows it's 37°C, mostly sunny, and the date is 4/13/2023.

This screenshot continues from the previous one, showing the 'Optional Features' and 'Object Classification' sections of the 'New Custom Object' setup page. In the 'Optional Features' section, several checkboxes are listed: 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. In the 'Object Classification' section, it notes that enabling these features classifies the object as an Enterprise Application object. Under 'Deployment Status', the 'Deployed' option is selected. In the 'Search Status' section, the 'Allow Search' checkbox is checked. The system status bar at the bottom shows it's 7:17 PM and the date is 4/13/2023.

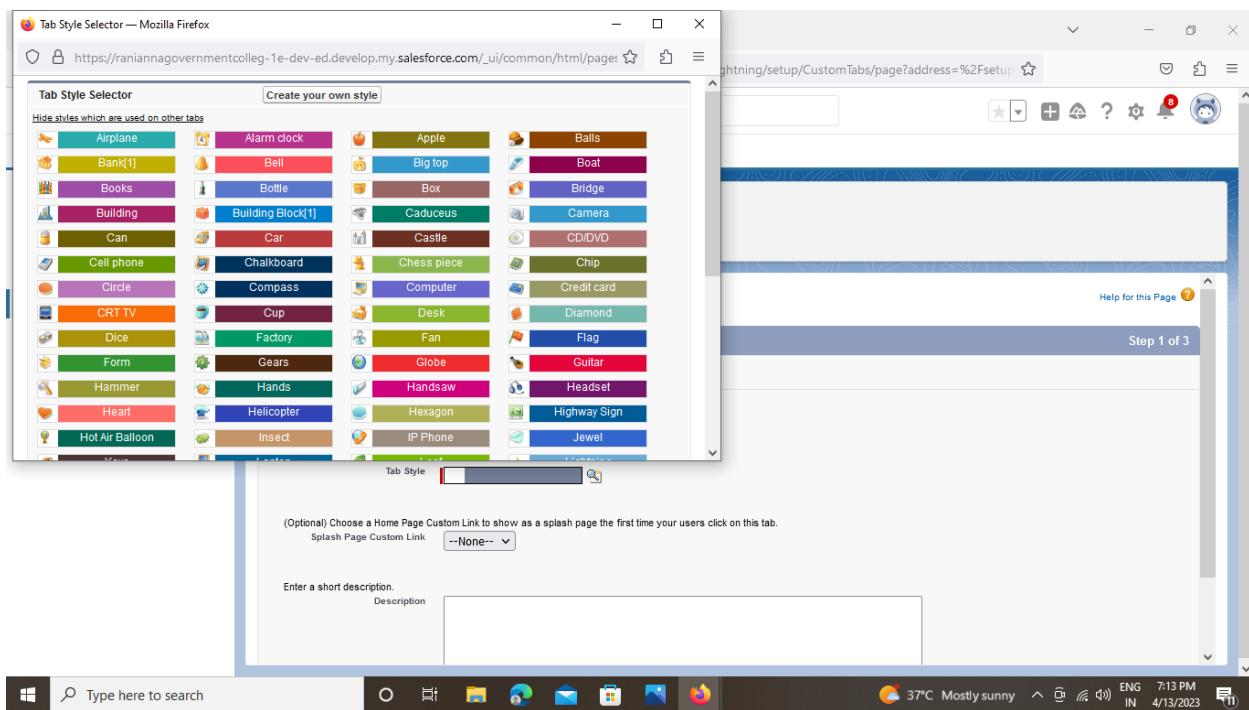
## MILESTONE 03: Tab

The screenshot shows the Salesforce Setup interface with the URL <https://raniannagovernmentcollege-1e-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home>. The left sidebar is expanded, showing 'User Interface' and 'Tabs'. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. Under 'Custom Object Tabs', there is a table with three rows:

Action	Label	Tab Style	Description
Edit   Del	Buyers	Building Block	
Edit   Del	Loans	Bank	
Edit   Del	Rents	Real Estate Sign	

Below the table, it says 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined'.

The screenshot shows the 'New Custom Object Tab' configuration page. The title bar says 'Step 1. Enter the Details' and 'Step 1 of 3'. The page asks to choose a custom object for the new tab. It includes fields for 'Object' (set to '--None--'), 'Tab Style' (set to 'Dark'), and an optional 'Splash Page Custom Link' (set to '--None--'). There is also a 'Description' field with a placeholder 'Enter a short description.' and a text input area.



## MILESTONE 04: The Lightning App

App Name	Developer Name	Description	Last Modified	App Type	Vi...
All Tabs	AllTabSet		21/02/2023, 11:41 am	Classic	<input type="checkbox"/>
Analytics Studio	Insights	Build CRM Analytics dashboards an...	21/02/2023, 11:41 am	Classic	<input checked="" type="checkbox"/>
App Launcher	AppLauncher	App Launcher tabs	21/02/2023, 11:41 am	Classic	<input checked="" type="checkbox"/>
Bolt Solutions	LightningBolt	Discover and manage business sol...	21/02/2023, 11:44 am	Lightning	<input checked="" type="checkbox"/>
Chatter Desktop	Chatter_Desktop	Chatter Desktop is an Adobe AIR-b...	21/02/2023, 11:50 am	Connected (Managed)	<input type="checkbox"/>

App Manager | Salesforce

https://raniannagovernmentcollege-1e-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

## New Lightning App

### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details		App Branding	
*App Name	Name your app...	Image	Primary Color Hex Value: #0070D2
*Developer Name	Enter a developer name...	Upload	
Description	Enter a description...	Org Theme Options	

Next

Lightning Bolt Solutions

Order	Label	Icon	Description	Created	Modified	Theme	Active
3	App Launcher	AppLauncher	App Launcher tabs	21/02/2023, 11:41 am	Classic	✓	
4	Bolt Solutions	LightningBolt	Discover and manage business sol...	21/02/2023, 11:44 am	Lightning	✓	
5	Chatter Desktop	Chatter Desktop	Chatter Desktop is an Adobe AIR-h...	21/02/2023, 11:50 am	Connected (Managed)		

Type here to search

37°C Mostly sunny 7:22 PM IN 4/13/2023

https://raniannagovernmentcollege-4a-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

## New Lightning App

### Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items	Selected Items
<input type="text" value="Loa"/>	Leads
	Buyers
	Rents
	Loans

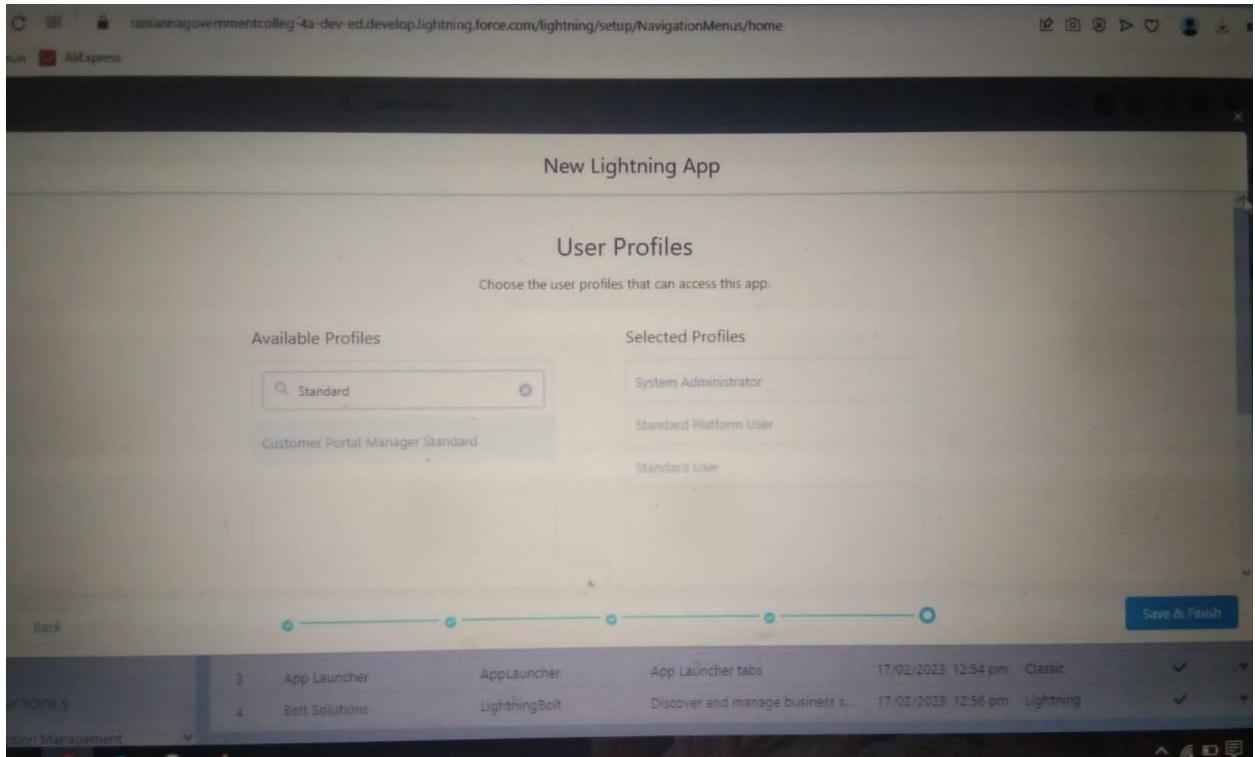
Back Next

3 App Launcher AppLauncher App Launcher tabs 21/02/2023, 12:54 pm Classic ✓

4 Bolt Solutions LightningBolt Discover and manage business sol... 17/02/2023, 12:56 pm Lightning ✓

CRM TOOLS

Script Management



## MILESTONE 05: Fields

The screenshot shows the 'Object Manager' screen in the Salesforce Setup. A single custom object, 'Student', is listed in the table. The table columns are: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Student' entry has an API name of 'Student\_\_c', is a 'Custom Object', was last modified on 11/04/2023, and is currently deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student	Student__c	Custom Object		11/04/2023	✓

Student | Salesforce

https://raniannagovernmentcollege-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w0000036kzV/F

Setup Home Object Manager

SETUP > OBJECT MANAGER Student

Fields & Relationships 19 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
BHK Type	BHK_Type__c	Picklist	Rental City	
City	City__c	Picklist	state	
Created By	CreatedBy	Lookup(User)		
Email	Email_c	Email		
Interest Rate	interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedBy	Lookup(User)		

Type here to search

38°C Mostly cloudy 7:36 PM ENG IN 4/13/2023

Student | Salesforce

https://raniannagovernmentcollege-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w0000036kzV/F

Setup Home Object Manager

SETUP > OBJECT MANAGER Student

Fields & Relationships

Field Label: Lead

Display Format: L-(0000) Example: A-(0000) [What is This?](#)

Starting Number: 0

Generate Auto Number for existing records

Field Name: Lead

Description:

Help Text:

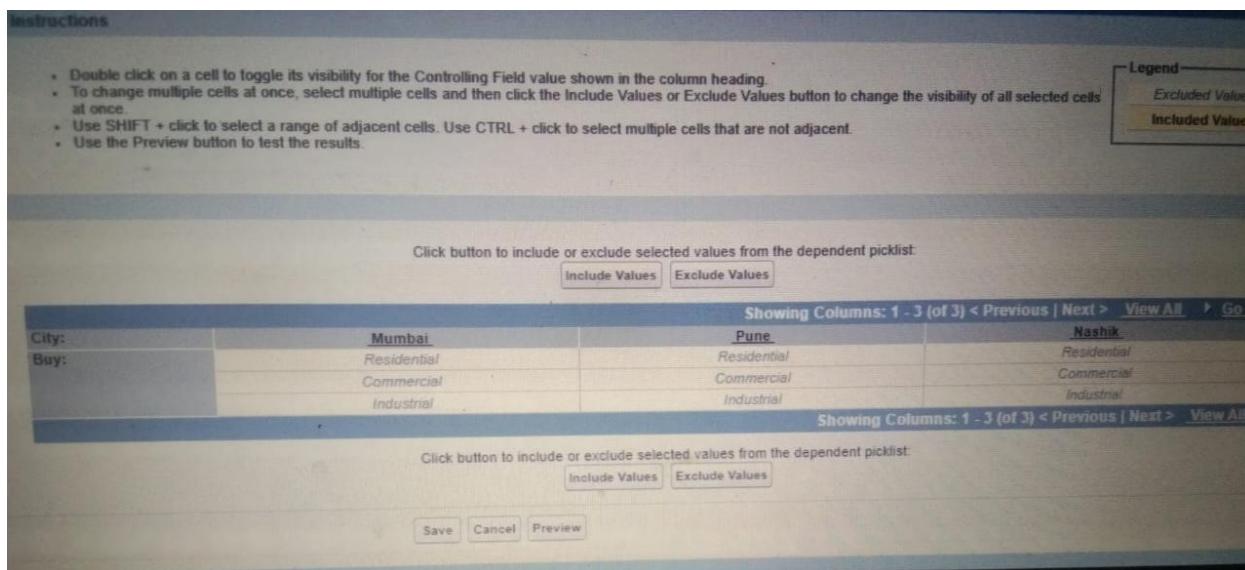
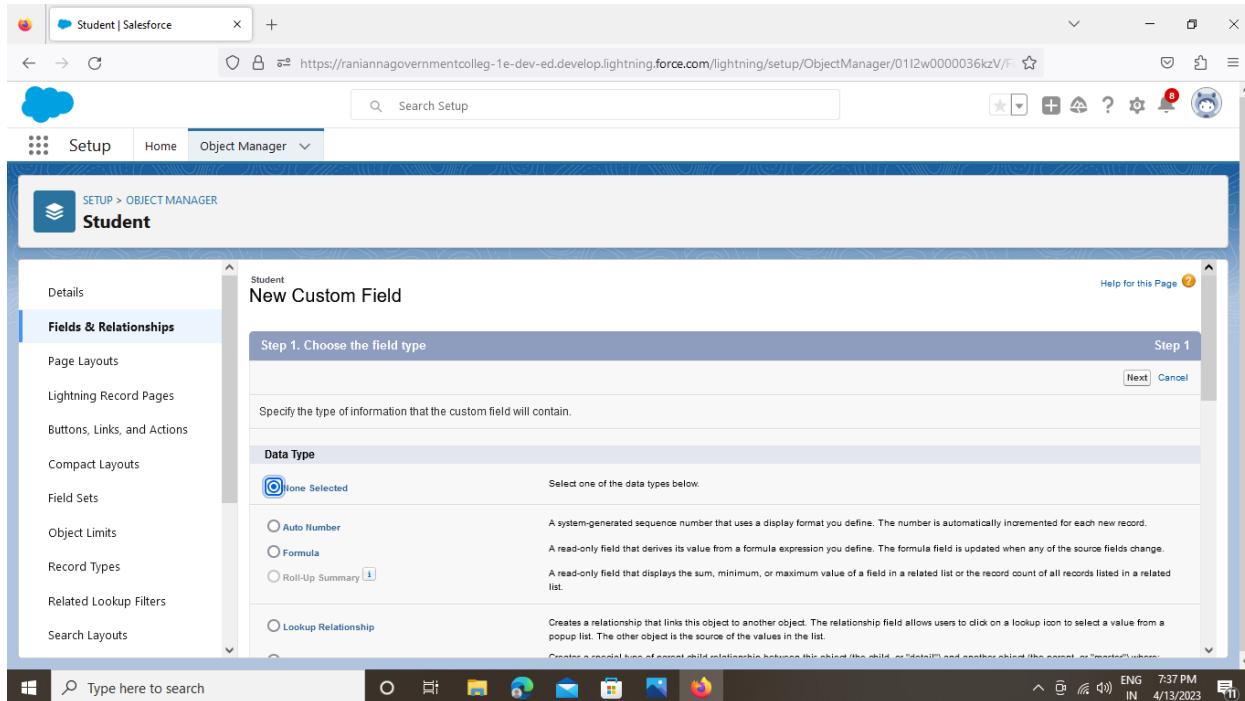
External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Next

Type here to search

29°C Partly cloudy 10:38 PM ENG IN 4/10/2023



## MILESTONE 06: Profile

The image displays two screenshots of the Salesforce Setup interface, illustrating the process of managing user profiles.

**Screenshot 1: Profiles Screen**

This screenshot shows the "Profiles" screen in the Salesforce Setup. The left sidebar navigation includes:

- Users
- Profiles (selected)
- Data
- Feature Settings
  - Data.com
    - Prospector Preferences
    - Prospector Users
    - Functions
  - Marketing
    - Lead Processes
  - Sales
    - Products
      - Asset Settings
      - Product Schedules

The main content area displays a table of existing profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

**Screenshot 2: Clone Profile Dialog**

This screenshot shows the "Clone Profile" dialog box. It prompts the user to enter the name of the new profile and specifies that an existing profile must be selected for cloning. The "Existing Profile" dropdown is set to "Analytics Cloud Integration User". The "User License" and "Profile Name" fields are present but empty.

The screenshot shows the Salesforce Setup interface for managing profiles. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main content area is titled 'Profiles' and shows the 'Marketing' profile. The profile detail section includes fields for Name (Marketing), User License (Analytics Cloud Integration User), Description, Created By (Mukta S.), and Modified By (Mukta S.). Below this is a 'Page Layouts' section for Standard Object Layouts, showing assignments for Global, Email Application, and Home Page Layout across various objects like Assignment, Opportunity, and Assignment.

This screenshot shows the Salesforce Setup interface for managing profiles, specifically the 'Sales' profile. The layout is identical to the Marketing profile screen, with sections for 'Profile Detail' (Name: Sales, User License: Analytics Cloud Integration User, etc.) and 'Page Layouts' for Standard Object Layouts. The page shows assignments for Global, Email Application, and Home Page Layout across various objects like Assignment, Opportunity, and Assignment.

**Profiles**

Individuals:       
 Invoices:     
 Leads:

Work Types:      
 Work Type Groups:

**Custom Object Permissions**

Object	Basic Access				Data Administration		Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Buyers	<input checked="" type="checkbox"/>	Rents	<input checked="" type="checkbox"/>										
Loans	<input checked="" type="checkbox"/>	Students	<input checked="" type="checkbox"/>										

**Session Settings**  
 Session Times Out After: 2 hours of inactivity  
 Session Security Level Required at Login: --None--

**Password Policies**

Windows Taskbar: Type here to search, File, Start, Task View, Mail, Photos, OneDrive, Firefox, 31, 19, 36°C Mostly sunny, ENG IN 1:46 PM 4/12/2023

## MILESTONE 07: New User

**Users**

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty002wv00000gvomheaz.ngcw8uzdsu@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	S. Mukta	MS	mukta.mukta2002@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	S. Mukta	ms	mukta.mukta2002@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Cross Org Data Proxy User
<a href="#">Edit</a>	User_Integration	integ	integration@00d2wv00000gvomheaz.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	inightssecurity@00d2wv00000gvomheaz.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Windows Taskbar: Type here to search, File, Start, Task View, Mail, Photos, OneDrive, Firefox, 31, 19, 36°C Mostly cloudy, ENG IN 8:08 PM 4/13/2023

Salesforce Setup - https://raniannagovernmentcolleg-1e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005

New User

User Edit

General Information

First Name	Mukila
Last Name	S
Alias	ms
Email	mukila265@gmail.com
Username	mukilas265@gmail.com
Nickname	User1681284653207289t
Title	
Company	
Department	
Division	

Role: <None Specified>

User License: Salesforce Platform

Profile: Standard Platform User

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Help for this Page

Salesforce Setup - https://raniannagovernmentcolleg-1e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005

New User

User Edit

General Information

First Name	Mukila
Last Name	S
Alias	ms
Email	mukila265@gmail.com
Username	mukilas265@gmail.com
Nickname	User1681284653207289t
Title	
Company	
Department	
Division	

Role: <None Specified>

User License: XOrg Proxy User

Profile: Cross Org Data Proxy User

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Help for this Page

**User Detail**

Name	Mukila S	Role	Cross Org Data Proxy
Alias	ms	User License	Cross Org Data Proxy
Email	mukila265@gmail.com	Profile	Cross Org Data Proxy User
Username	mukila265@gmail.com	Active	✓
Nickname	User16912851784213887470	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>

## MILESTONE 08: Permission Set

**Permission Sets**

On this page you can create, view, and manage permission sets.

In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Create New View</a>
<a href="#">New</a>	<a href="#">New</a>	<a href="#">Clone</a>	<a href="#">Clone</a>
<a href="#">Buyer</a>	<a href="#">Buyer</a>	<a href="#">Buyer Manager</a>	<a href="#">Buyer Manager</a>
<a href="#">CRM User</a>	<a href="#">CRM User</a>	<a href="#">Commerce Admin</a>	<a href="#">Commerce Admin</a>
<a href="#">Commerce Admin</a>	<a href="#">Commerce Admin</a>	<a href="#">Contact Center Admin</a>	<a href="#">Contact Center Admin</a>
<a href="#">Contact Center Agent</a>	<a href="#">Contact Center Agent</a>	<a href="#">Contact Center Supervisor</a>	<a href="#">Contact Center Supervisor</a>
<a href="#">Contact Center Supervisor</a>	<a href="#">Contact Center Supervisor</a>	<a href="#">Experience Profile Manager</a>	<a href="#">Experience Profile Manager</a>

Permission Sets | Salesforce

https://raniannagovernmentcolleg-1e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2F

Setup Home Object Manager

Q perm

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?  
Try using Global Search.

Permission Set Create

Label:  \*

API Name:

Description:

Session Activation Required:

Select the type of users who will use this permission set?

Who will use this permission set?

-Choose "None" if you plan to assign this permission set to multiple users with different user and permission set licenses.  
-Choose a specific user license if you want users with only one license type to use this permission set.

Help for this Page

Type here to search

https://raniannagovernmentcolleg-1e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/OPS2w000009qN4H/Permission

Setup Home Object Manager

Q permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?  
Try using Global Search.

Marketing

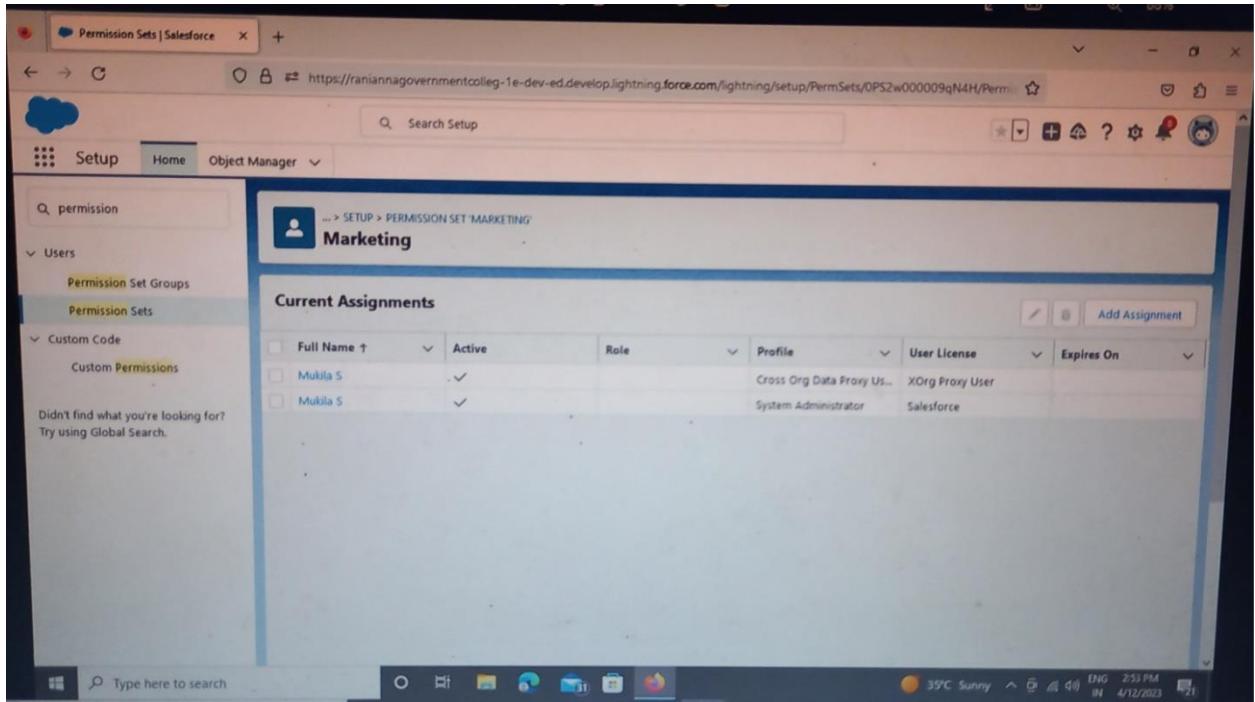
... > SETUP > PERMISSION SET 'MARKETING'

Marketing

Current Assignments

No assignments defined.

35°C Sunny 2:51 PM IN 4/12/2023



## MILESTONE 09: Set-Up For OWD

The screenshot shows the Salesforce Sharing Settings page. At the top, there is a search bar with the query "sharin". Below the search bar, the left sidebar shows "Sharing Settings" selected under "Security". A message says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Sharing Settings" and contains the following sections:

- Manage sharing settings for:** All Objects
- Default Sharing Settings**:
  - Organization-Wide Defaults**:

Object	Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
  - Web Call Document**:

Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Buy	Public Read/Write	Private	□
Loan	Public Read/Write	Private	□
Rent	Private	Private	✓
Student	Public Read/Write	Private	✓
  - Other Settings**:
    - Standard Report Visibility:
    - Manual User Record Sharing:
    - Manager Groups:
    - Secure guest user record access:
    - Require permission to view record names in lookup fields:

At the bottom of the page are "Save" and "Cancel" buttons.

# MILESTONE 10: Report

The screenshot shows the Salesforce Setup Home page. In the top navigation bar, there is a search bar labeled "Search Setup". Below the search bar, there are tabs for "Setup", "Home", and "Object Manager". A sidebar on the left contains a search bar with the query "reports" and sections for "Apps", "Items", "Reports", and "Administration". Under "Administration", there are links for "Salesforce Mobile App", "Lightning Usage", and "Optimizer". Under "PLATFOM TOOLS", there is a link for "Subscription Management". The main content area features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these cards, there is a section titled "Most Recently Used" with a count of "10 items".

The screenshot shows the "Reports" section of the Lightning Usage App. The top navigation bar includes a search bar labeled "Search...", a "TYPE" dropdown set to "REPORTS", and a date/time indicator "33°C Mostly cloudy 8:34 PM ENG IN 4/13/2023". Below the navigation bar, there is a header with tabs for "Reports", "Recent", and "6 items". To the right of the header are buttons for "New Report", "New Folder", and a gear icon. A table below the header lists reports with columns for "Report Name", "Description", "Folder", "Created By", "Created On", and "Subscribed".

Report Builder | Salesforce

https://raniannagovernmentcolleg-1e-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOjyZXBvcnRzO

Lightning Usage App

Reports

### Create Report

Category

- Recently Used
- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders

Select a Report Type

Search Report Types...

Recently Used Report Types

Report Type Name	Category
Buyers	Standard
Loans	Standard
Rents	Standard

Type here to search

Report Builder | Salesforce

https://raniannagovernmentcolleg-1e-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOjyZXBvcnRzO

Lightning Usage App

Reports

### Create Report

Category

- Recently Used
- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders

Select a Report Type

Search Report Types...

Report Type Name Category

Opportunity Trends	Standard
Rents	Standard

Details

Rents Standard Report Type

Start Report

Details Fields (11)

Created By You

New Rents Report Last Used 4/12/2023

New Rents Report Last Used 4/12/2023

Report Builder | Salesforce

Lightning Usage App

REPORT ▾

New Rents Report

Rents

Groups

1 GROUP ROWS

Add group...

Columns

Add column...

Rent: Rent Name

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Save & Run

Save

Close

Run

Type here to search

Report Builder | Salesforce

Lightning Usage App

REPORT ▾

New Rents Report

Rents

Groups

1 GROUP ROWS

Add group...

Columns

Add column...

Rent: Rent Name

Save Report

Report Name

New Rents Report

Report Unique Name

New\_Rents\_Report\_bcd

Report Description

Cancel

Save

33°C Mostly cloudy

8:37 PM

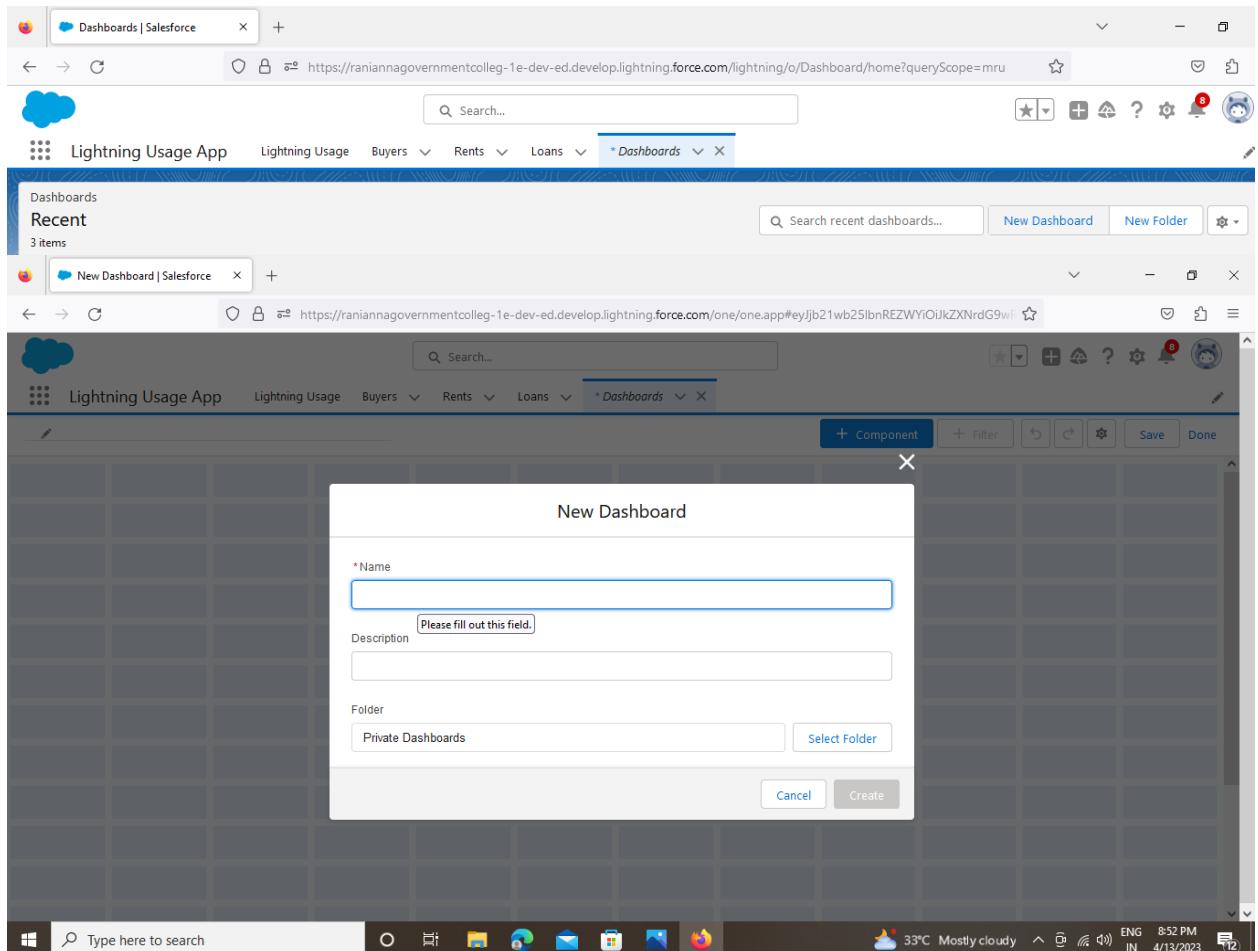
ENG IN

4/13/2023

The screenshot shows a Salesforce Lightning interface. The top navigation bar includes tabs for 'Lightning Usage App', 'Lightning Usage', 'Buyers', 'Rents', and 'Loans'. The active tab is 'Rents'. A sub-tab 'New Rents Report' is selected. The main content area displays a report titled 'Report: Rents' with the heading 'New Rents Report'. It shows 'Total Records' as 1, with a single row for 'Rent: Rent Name' containing the value 'Apartment'.

## MILESTONE 11: Dashboards

The screenshot shows a Salesforce Lightning interface. The top navigation bar includes tabs for 'Lightning Usage App', 'Lightning Usage', 'Buyers', 'Rents', and 'Loans'. The active tab is 'Loans'. A sub-tab 'Dashboards' is selected. The main content area displays a search results page for 'dashboards'. The sidebar on the left shows search filters for 'Apps' (No results) and 'Items' (Dashboards). The main area shows a table with columns for 'Name', 'Type', 'Last Modified', and 'Actions'. A search bar at the top right allows filtering by name.



The screenshot shows a Salesforce Lightning Usage App dashboard titled "loan report". The dashboard has a header with tabs: "Lightning Usage", "Buyers", "Rents", and "Loans". Below the header is a search bar and a toolbar with various icons. The main area is a large, empty grid table with multiple columns and rows, intended for displaying report data. At the top of the grid are buttons for "+ Component", "+ Filter", "Save", and "Done".

**loan report**

+ Component + Filter Save Done

**Select Report**

**Reports**

**Recent**

- Created by Me
- Private Reports
- Public Reports
- All Reports

**Folders**

- Created by Me

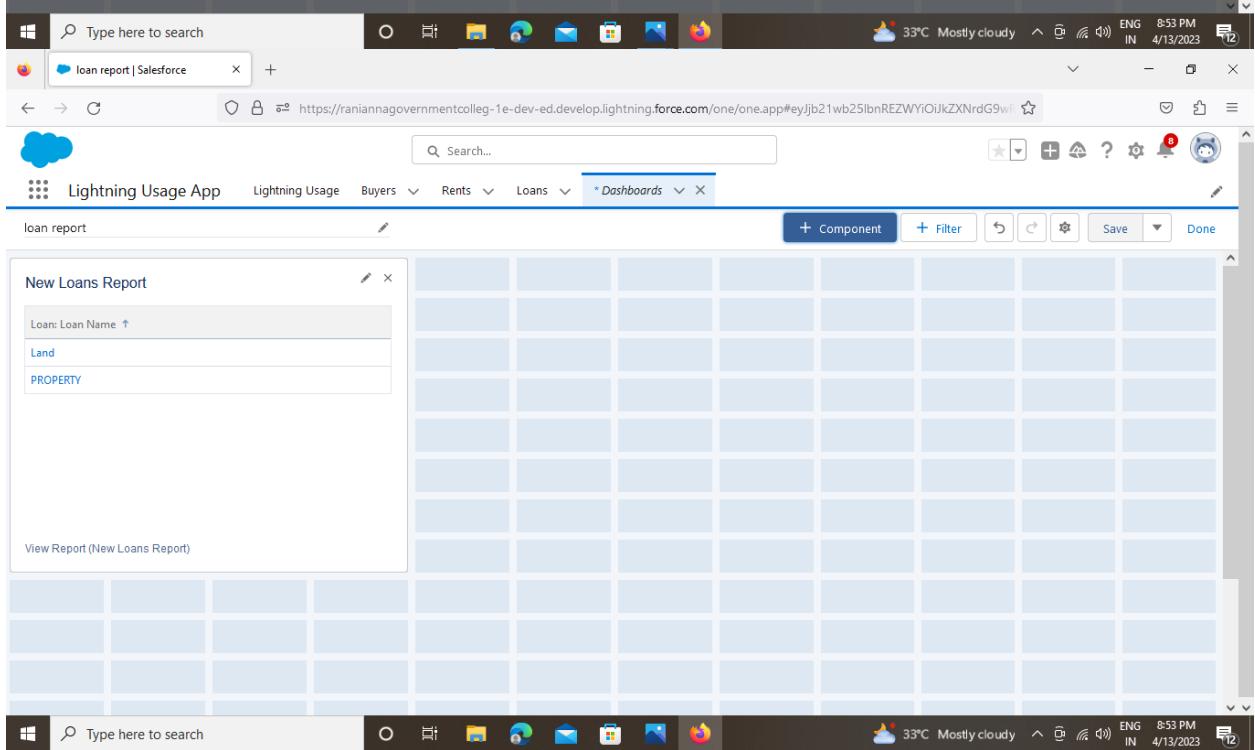
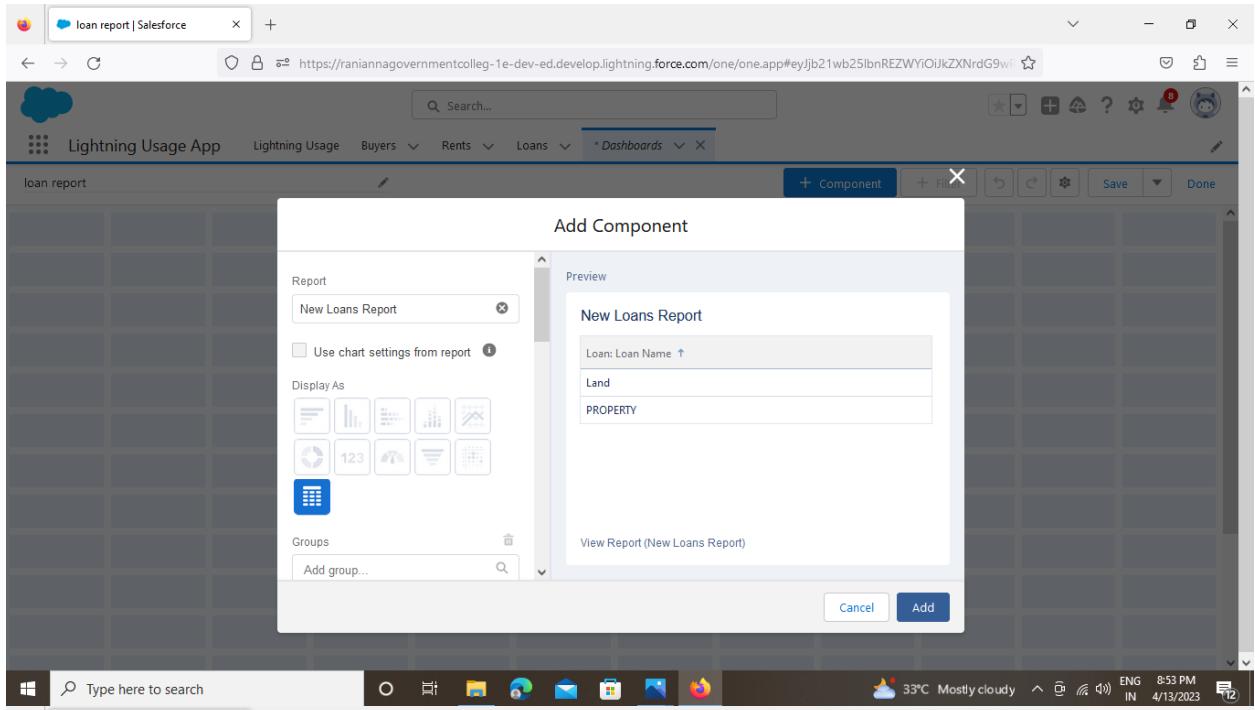
New Rents Report  
Mukila S - 13-Apr-2023, 7:33 pm · Private Reports

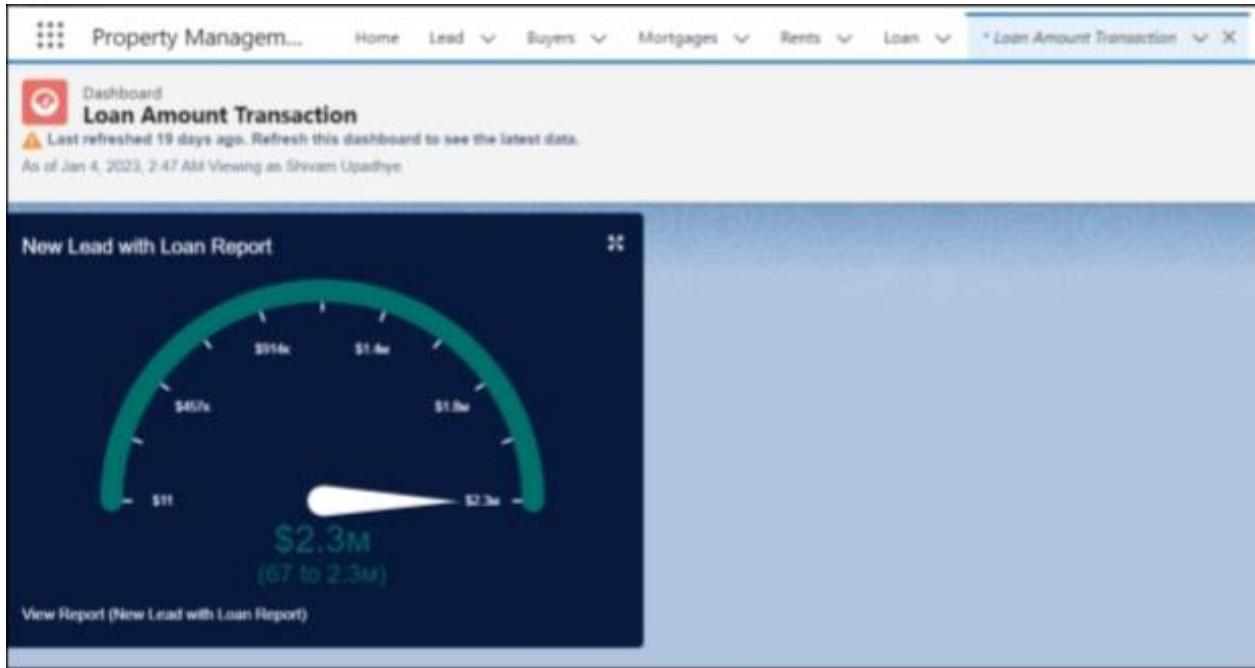
New Buyers Report  
Mukila S - 13-Apr-2023, 11:44 am · Private Reports

New Loans Report  
Mukila S - 12-Apr-2023, 8:34 pm · Private Reports

New Rents Report

Cancel Select





## TRAILHEAD PROFILE PUBLIC URL:

**TEAM LEADER:**

<https://trailblazer.me/id/mukis5>

**TEAM MEMBER 1:**

<https://trailblazer.me/id/athilakshmi13>

**TEAM MEMBER 2:**

<https://trailblazer.me/id/petcm1>

**TEAM MEMBER 3:**

<https://trailblazer.me/id/emimt>

## **TEAM MEMBER:**

<https://trailblazer.me/id/kuppp>

## **ADVANTAGES & DISADVANTAGES:**

### **ADVANTAGES:**

- Enterprise-level platform security that improves with each release
- 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 database of accounts, properties, tenants, or listings.
- Data integration of various data sources
- Streamlined lead management and nurturing with Salesforce to ensure that you can generate leads from various channels and streamline lead-to-deal workflows.
- Automated omnichannel lead tracking, Account and Lead management, and routing
- Boosted document management and improved collaboration on contracts, agreements, and deals by defining user roles
- Simplified template-based document generation, tracking, and approval
- Improved management of maintenance requests/tasks/calls

- Simplified tenant onboarding routine and creation of administrative information, service descriptions, and agreements within a real estate app
- Facilitated the rent collection/payment process
- Unified data storage, lease administration, and portfolio management
- Comprehensive reporting & analytics on property status and availability, agents' KPIs, profitability, local and global trends, and real estate market fluctuations
- Forecasting based on interaction history and automated report scheduling
- Simplified renewals and leases management
- Automated tenant notifications.

## **DISADVANTAGES:**

- Lack of specialists that have a deep understanding of property management business and its priorities.
- Higher price if you look not only for technical skills but for industry expertise, especially in specific niches like property management.

## **APPLICATION:**

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that enables businesses to

manage customer data, sales operations, and marketing campaigns.

Salesforce's products include several customer relationship management (CRM) technologies, including: Sales Cloud, Service Cloud, Marketing Cloud, and Commerce Cloud and Platform. Additional technologies include Slack, MuleSoft, Tableau Analytics, and Trailhead.

Salesforce is the world's #1 customer relationship management (CRM) platform. We help your marketing, sales, commerce, service and IT teams work as one from anywhere, so you can keep your customers happy everywhere.

## FUTURE SCOPE:

Salesforce training would be a natural choice, as more and more businesses are adopting Salesforce for their Customer Relationship Management(CRM) and marketing plans. You may also be an eCommerce practitioner or sales executive with a stagnant career path, exploring an upskilling course.

Salesforce Inc quote is equal to 197.710 USD at 2023-04-04. Based on our forecasts, a long-term increase is expected, the "CRM" stock price prognosis for 2028-03-29 is 202.742 USD. With a 5-year investment, the revenue is expected to be around +2.54%. Your current \$100 investment may be up to \$102.54 in 2028.

According to our Salesforce stock prediction for 2030, CRM stock will be priced at \$ 502.91 in 2030. This forecast is based on the stock's average growth over the past 10 years.

## CONCLUSION:

In conclusion, Property Management System (PMS) software is very crucial for all the Hotels. Especially Opera PMS constitutes the most appropriate PMS software for Hilton Athens. It is user friendly, connects with Central Reservation System (CRS), Point of Sale (POS) etc. and provides all the tools the hotel needs in order to operate effectively. The disadvantages of the Opera PMS can be improved easily and as it was mentioned before a recommendation is the upgrade of Opera V5 to Opera 9.