

PROJECT REPORT TEMPLATE

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1.INTRODUCTION

1.1 Overview

A Property Management system 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. PMS enhances communication between tenants,owners and managers,making it easier for all parties to stay informed and connected in real time

1.2 Purpose

- i) Salesforce property management enables the realty managers to keep track of crucial data about financial.
- ii) Household properties incorporating associated cash flow,primary tenants and occupancy rates.
- iii) Property managers assist owners in creating budgets,advertise rental properties, qualify tenants and collect rent
- iv) They also comply with the local landlord and real estate board laws and maintain the property.

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 and pain points, to quickly understand your users' experience and mindset

Says

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

Thinks

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

Does

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


Feels

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

2.2 Ideation & Brainstorming Map

Priority

Your team should all be on the same page about what's important. Having different ideas about what's important is a problem. Make your ideas on the grid to explain how urgent tasks are important and what are less so.

 **Importance**

A grid of 16 squares (4x4) with a vertical axis labeled 'Priority' and a horizontal axis labeled 'Feasibility'. The grid is divided into four quadrants by a vertical and a horizontal line. The quadrants are labeled as follows:

- Top-Left: **High Priority, Low Feasibility**
- Top-Right: **High Priority, High Feasibility**
- Bottom-Left: **Low Priority, Low Feasibility**
- Bottom-Right: **Low Priority, High Feasibility**

Feasibility

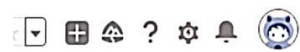
Remember that your important goals often are less feasible than other things you want.

| 3) RESULT | | FIELDS IN THE OBJECTS |
|----------------|----------------------|-----------------------|
| 3.1 DATA MODEL | | |
| OBJECT NAME | FIELD IN THE OBJECTS | |
| | FIELD LABEL | DATA TYPE |
| Lead | 1)lead | Auto number |
| | 2)State | Picklist |
| | 3)City | Picklist |
| | 4)Email | Email |
| | 5) Phone | Phone |
| Buy | 1) Property type | Picklist |
| | 2) Discount | Percent |
| | 3) State | Picklist |
| | 4)City | Picklist |
| Rent | 1)Rent | Auto number |
| | 2) Rental City | Text |
| | 3)BHK type | Picklist |

| OBJECT NAME | FIELD IN | E OBJECTS |
|--------------|--------------------------|-------------|
| | FIELD LABEL | DATA TYPE |
| Loan | 1)Loan ID | Auto number |
| | 2)Interest Rate | Currency |
| | 3)Term | Number |
| | 4) Annual Loan | Number |
| | 5)To1al Loan Instalmenls | Number |
| | 6) Loan Repaymentl | Number |
| | 7) Loan Amount | Formula |
| | | |
| 3.2 ACTIVITY | AND | SCREENSHOTS |
| | | |



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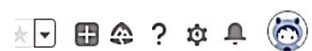
•;; Setup Home Object Manager ••

SETUP > OBJECT MANAGER
Lead

| Details | |
|-----------------------------|-------------------------------------|
| Fields & Relationships | |
| Page Layouts | |
| Lightning Record Pages | Lead |
| Buttons, Links, and Actions | Custom |
| Compact Layouts | Singular Label Lead |
| Field Sets | Plural Label Leads |
| Object Limits | |
| Record Types | |
| Related Lookup Filters | |
| Search Layouts | |
| | Track Activities |
| | Track Field History |
| | Deployment Status |
| | Help Settings |
| | Standard Salesforce.com Help Window |



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| Details | | Details | |
|-----------------------------|----------------|-------------|-------------------------------------|
| Fields & Relationships | | Description | |
| Page Layouts | | API Name | Enable Reports |
| Lightning Record Pages | buy c | Custom | ✓ |
| Buttons, Links, and Actions | | | Track Activities |
| Compact Layouts | Singular Label | | Track Field History |
| Field Sets | buy | | Deployment Status |
| Object Limits | Plural Label | | Deployed |
| Record Types | buy | | Help Settings |
| Related Lookup Filters | | | Standard Salesforce.com Help Window |
| Search Layouts | | | |

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Lead

Details

Fields & Relationships

29 Items, sorted by reela Label

🔍 Quick Find

New

Deleted fields

Field Dependencies

Set History Tracking

Map Lead Fields

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------------|-------------------|---------------------|-------------------|---------|
| Address | Address | Address | | |
| Annual Revenue | AnnualRevenue | Currency(18, 0) | | |
| | | Picklist | | |
| Clean Status | CleanStatus | Picklist | | ✓ |
| Company | Company | Text(255) | | ✓ |
| Company D-U-N-S Number | CompanyDunsNumber | Text(9) | | |
| Created By | CreatedById | Lookup(User) | | |
| Current Generator(s) | CurrentGenerators | Text(100) | | |
| | | Lookup(255 Company) | | ✓ |

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SetupHomeObject Manager

SETUP > OBJECT MANAGER

Lead

Details

* Fields & Relationships

29+ Items, Sorted by Field Label

🔍 Quick Find

New

Deleted fields

field Dependencies

Set History Tracking

Map Lead Fields

Fields & Relationships

Page layouts

Lightning Record Pages

Buttons, Links, and Actions

Field Sets

Record Types

Related Lookup Filters

Search Layouts

| | | | | |
|---------------|--------------------|-----------------------|--|---|
| D&B Company | Dandb CompanyId | Lookup(D&B Company) | | ✓ |
| Data.com Key | Jigsaw | Text(20) | | |
| Description | Description | Long Text Area(32000) | | |
| Do Not Call | DoNotCall | Checkbox | | |
| Email | email_r | Email | | |
| Email Opt Out | HasOptedOutOfEmail | Checkbox | | |
| Fax | Fax | Fax | | |
| Fax Opt Out | HasOptedOutOfFax | Checkbox | | |



Profite

Custom: Marketing Profite

[Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Licenses](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Ans \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profite Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

| | | | |
|----------------|--|--|--------------------------------------|
| Full Name | tJame | | |
| Custom Profile | Custom: Marketing Profile | | |
| User License | Salesforce | | |
| Description | Custom Profile  | | |
| Created By | vasantha kumar, 27/03/2023, 1:51 pm | | Modified By |
| | | | vasantha kumar, 15/04/2023, 10:22 am |

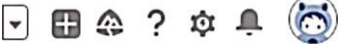
Page Layouts

Standard Object Layouts

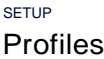
| | | | |
|-------------------|-----------------------------------|------------------|---|
| Global | Global Layout (New Assignment) | Object Milestone | Global Layout [View Assignment] |
| Email Application | Not Assigned (View Assignment) | Operating Hours | Operating Hours Layout [View Assignment] |
| Home Page Layout | Default | Opportunity | Opportunity [View Assignment] |

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Profile

Custom: Sales Profile

[Help fac this Page](#)

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If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login Pages \(0\)](#) |
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 [Enabled Visualforce Page Access \(g\)](#) |
 [Enabled External Data Source Access \(0\)](#) |
 [Enabled Named Credential Access \(1\)](#) |
 [Enabled Custom Metadata Type Access \(1\)](#) |
 [Enabled Custom Setting Definitions Access \(0\)](#) |
 [Enabled Flow Access \(1\)](#) |
 [Enabled Service Presence Status Access \(g\)](#) |
 [Enabled Custom Permissions \(0\)](#)

Proùle Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

| | |
|---|--|
| trame | Custom: Sales Profile |
| User License | Saksforce |
| Created By | Modified By |
| <u>vasantha kumar</u> , 27/03/2023, 1:51 pm | <u>vasantha kumar</u> , 14/04/2023, 11:33 pm |

Page Layouts

Standard Object Layouts

| | | | |
|-------------------|---|------------------|--|
| Global | CbbalLayoUt (New Assignment) | Object Milestone | ObjectMilestoneLayout (View Assignment) |
| Email Application | flot Assig/Jed (View Assignment) | Operating Hours | OperatingHoursLayout (View Assignment) |
| Home Page Layout | DF Default | Opportunit  | Opportunity (Sales) Layout |

Profile

Custom: Support Profile

Help for this Page

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If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

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Profile Detail

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User License Salesforce Custom Profile

Created By [vasantra kumar](#), 27/03/2023, 1:51 pm Modified By [vasantha tumar](#), 14/04/2023, 11:33 pm

Page Layouts

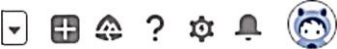
Standard Object Layouts

| | | | |
|-------------------|--|-------------------|---|
| Global | Gbbal Layout [New Assignment] | Object iMilestone | @_brect fMilestone Layout [New Assignment] |
| Email Application | Not Assigned [drew Assignment] | Operating Hours | Operating Hours Layout [View Assignment] |
| Home Page Layout | DE Default | Opportunity | Ogportunty (Support) Layout |

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All Users

Help for this Page

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 tasM from your mobile devices: [iOS](#) | [Android](#)

View: [All Users](#) [Edit](#) | Create New View.

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

| <input type="checkbox"/> Action | Full Name ↑ | Alias | Username | Role | Active | Profile |
|---------------------------------|-----------------------------------|---------------------|---|------|--------|---|
| @ Edit | Chatter Expert | Chatter | chatty.00d2vz00000rgdgreaZ_dtmvdg)glr@chatter.ssflesforce.com | | | Chatter Free User |
| @ Edit | kurriar, vanantha | vkuma | vasanthak»mar2002@gac.com | | | System Administrator |
| @ Edit | Kumar, Vasantha | vkuma | vasanthakumark82@gmail.com | | 'd** | Standard User |
| @ Edit | gser,Irtegratan | integ | integration@00d2w000000rgdgreaZ.com | | | Analytics Cbud Integration User |
| @ Edit | User, Security | SEC | irisightsecurity@00d2w000000rgdgreaZ.com | | | Analytics Cbud Security User |

[t4ew Userj](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

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Recent

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Private Reports

New Leads Report

Private Repons

vasantha kumar

15/4/2023 12:43 pm

Subscribed

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All folders

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Dashboards

Recent

Q Search recent dashboards... | [New Dashboard](#) [New Folder](#) ,j\$ •

| DASHBOARDS | Dashboard Name ▾ | Description | Folder ▾ | Created By ▾ | Created On ▾ | Subscribed |
|--------------------|---|-------------|--------------------|--------------------------------|---------------------|------------|
| Recent | Loan Amount Transaction | | Private Dashboards | vasanfha kumar | 15/4/2023, 12:46 pm | |
| Created by Me | Loan Amount | | Private dashboards | vasantha kumar | 15/4/2023, 12:46 pm | |
| Private Dashboards | | | | | | |
| All Dashboards | | | | | | |
| All folders | | | | | | |
| Created by Me | | | | | | |
| shared with Me | | | | | | |

FAVORITES

All Favorites

4 TRAILHEAD PROFILE PUBLIC URL

Team Lead- <https://trailblazer.me/id/ust8m>

Team Member 1-<https://trailblazer.me/id/ssrihari9>

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

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

5) ADVANTAGES

i) The application should be accessible on mobile devices, enabling users to manage their properties and tenants on-the-go.

ii) The application should provide document management capabilities, allowing users to store and share property-related documents, such as lease agreements and maintenance records.

iii) The application should enable users to process rent payment, security deposits and other fees electronically.

iv) The application should be scalable, allowing users to manage multiple properties and tenants as their business grows.

DISADVANTAGES

They make accounting, monitoring and communicating processes simpler. In the owner's tab, all the details are available about the properties. While reducing third-party resources, property management software accelerates business processes so that you can achieve greater management uniformity and improve performance.

6) APPLICATION

The application of Property Management are,

- i) Real Estate
- ii) Buildings
- iii) Apartments
- iv) Lease properties

7 CONCLUSION

- i) Use this project for industrial purposes in a wide range.
- ii) Low cost.
- iii) The accuracy of this project may be improved by adding some features.

8 FUTURE SCOPE

Property management application should allow users to manage all aspects of their properties, including vacancies, maintenance and leasing. This application should allow users to manage lease agreements, including lease terms, renewal options and rental rates. This application should offer communication tools, such as email and SMS notification, to keep tenants and maintenance personnel informed of important updates.