PROJECT REPORT

ON

Property Management Application Using Salesforce - (DEV)

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1. INTRODUCTION

1.1. Overview

The Property Management Salesforce Lightning App is a robust solution that streamlines the property buying process for buyers and empowers marketing and sales teams with valuable tools. Buyers can input their preferences and receive comprehensive property details, along with customized discounts based on their interests. Additionally, the app includes a loan calculator to estimate eligible loan amounts. With secure user profiles for marketing and sales teams, automated workflows, and informative reports and dashboards, the app optimizes operations, improves the buyer experience, and facilitates data-driven decision making in the property management sector.

1.2. Purpose

The primary goal of the Property Management Salesforce Lightning App is to offer a complete and effective solution for property buyers, marketing, and sales teams. Its key objectives include simplifying the property buying process, pairing buyers with appropriate properties and discounts, calculating loan eligibility, and ensuring secure data access for marketing and sales teams. Furthermore, the app provides valuable analytics through reports and dashboards, empowering data-driven decision-making and improving overall efficiency within the property management industry.

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1. Problem Definition:

The property management sector encounters various obstacles, such as inefficiencies in property purchasing, challenges in aligning buyers with appropriate properties, and the absence of personalized offers for potential buyers. Additionally, streamlined loan estimation processes for buyers are often lacking, and there is a demand for secure data access for marketing and sales teams. These difficulties can result in a less satisfactory buyer experience, reduced marketing and sales efficiency, and limited decision-making capabilities for management.

2.2. Design Thinking Approach:

Design Thinking is a user-centred problem-solving methodology that revolves around grasping the needs of users and devising inventive solutions to tackle their challenges effectively. When applied to the development of the Property Management Salesforce Lightning App, the Design Thinking approach would encompass the following stages:

2.3. Empathize:

Gather insights by conducting interviews and seeking feedback from property buyers, marketing, and sales teams to understand their specific challenges, pain points, and expectations. Utilize methods like user surveys and observation to gain a deeper understanding of their behaviours and preferences.

2.4. Define:

Based on the insights obtained during the Empathize phase, distinctly outline the problematic areas. Identify the fundamental needs and demands of buyers, marketing, and sales teams to guide the development of the app.

2.5. Ideate:

Arrange collaborative brainstorming sessions involving a diverse range of stakeholders to foster the generation of inventive ideas and potential solutions. Encourage thinking outside the conventional norms to explore innovative features and functionalities for the app.

2.6. Prototype:

Create rapid and low-fidelity prototypes of the app to visualize the user interface and interactions. Collect feedback from users and stakeholders regarding the prototypes to improve and fine-tune the app's design.

2.7. Test:

Perform usability tests with representative users to assess the functionality and user experience of the app. Identify any potential usability challenges or areas that need improvement and iteratively refine the design based on the feedback received.

2.8. Implement:

Utilizing the feedback and insights gathered during the testing phase, commence the development of the Property Management Salesforce Lightning App. Incorporate the essential features, data model, automation, and security settings in alignment with the principles of the Design Thinking process.
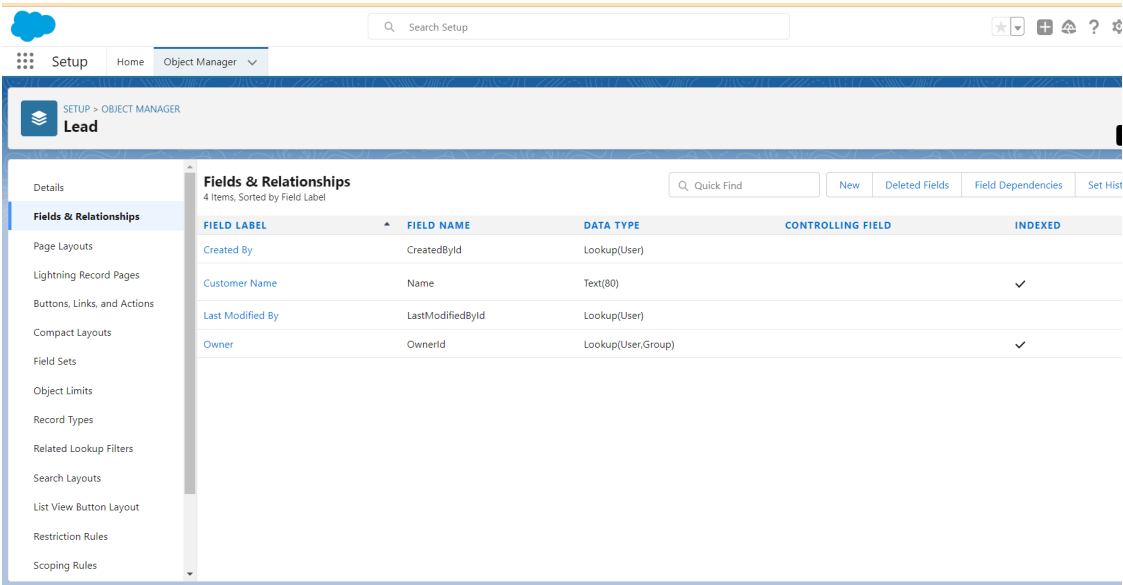
2.9. Evaluate:

Consistently collect feedback from users even after the app has been implemented and deployed. Evaluate the app's performance concerning its ability to achieve the defined objectives and user satisfaction.

3. RESULT

3.1. Data-model:

a) Lead

b) Enquiry

c) Property

d) Loan

3.2. Activity and Screenshot:

MILESTONE 1: Salesforce

ACTIVITY 1: Creating Developer Account

Created Developer Account using the given Link present in the DeveloperEdition Link.

ACTIVITY 2: Account Activation
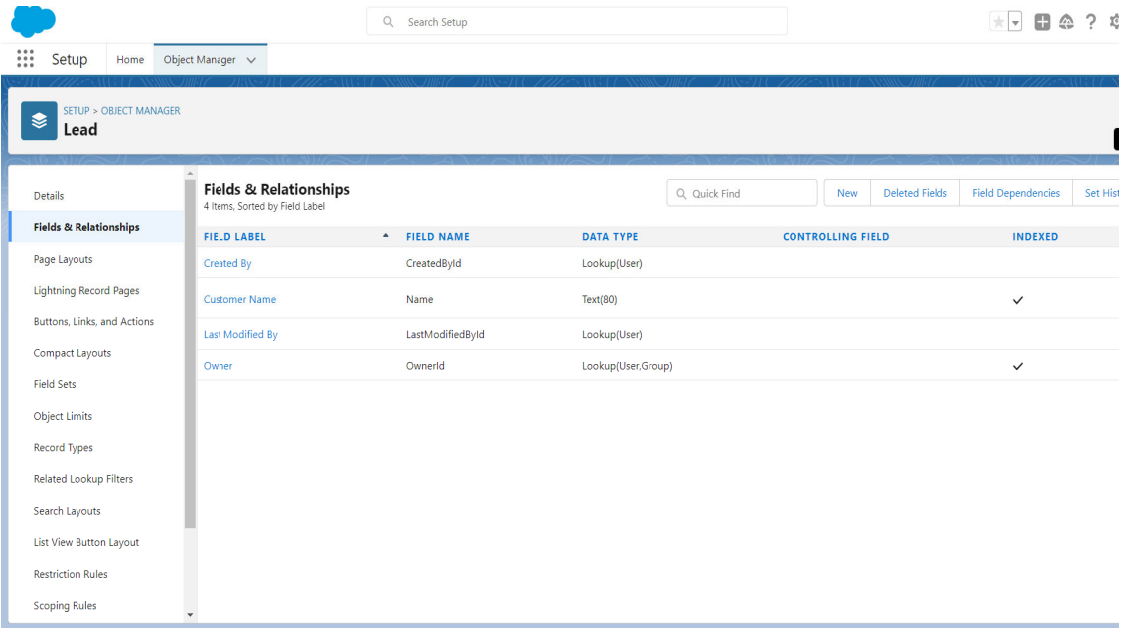
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10 mins.
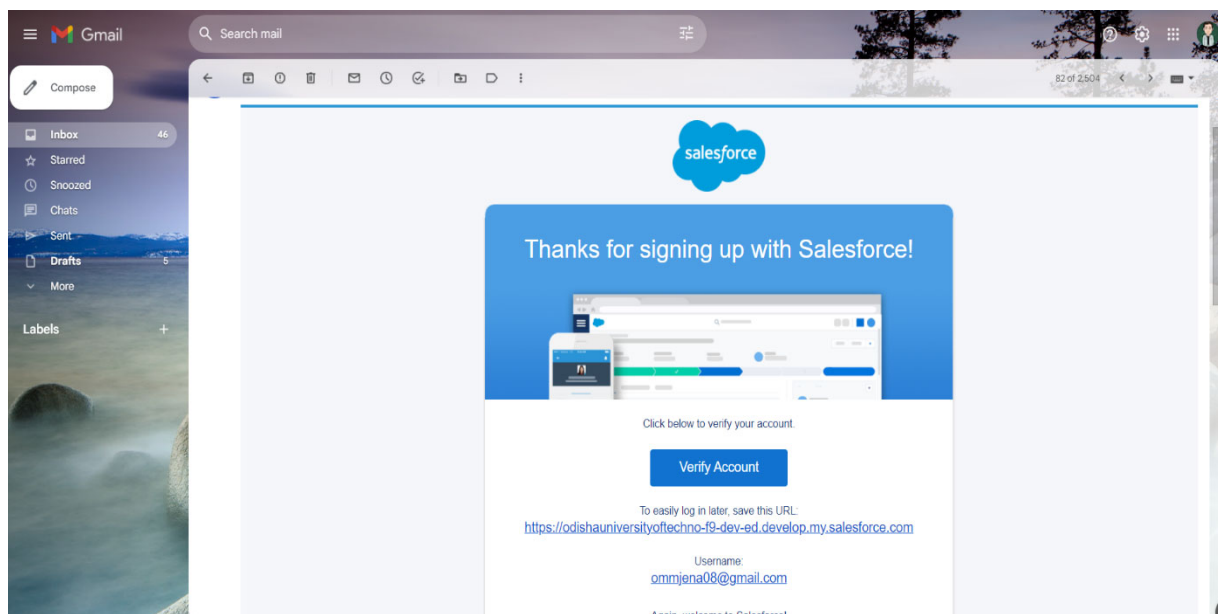
MILESTONE 2: Object

ACTIVITY 1: Create Object Lead

Created Object named Lead as displayed in below image.

ACTIVITY 2: Create Object Property

Created Object named Property as displayed in below image.

ACTIVITY 3: Create Object Enquiry

Created Object named Enquiry as displayed in below image.

ACTIVITY 4: Create Object Loan

Created Object named Loan as displayed in below image.

MILESTONE 3: Tab

ACTIVITY 1: Create Lightning Tab for Enquiry, Property and Loan

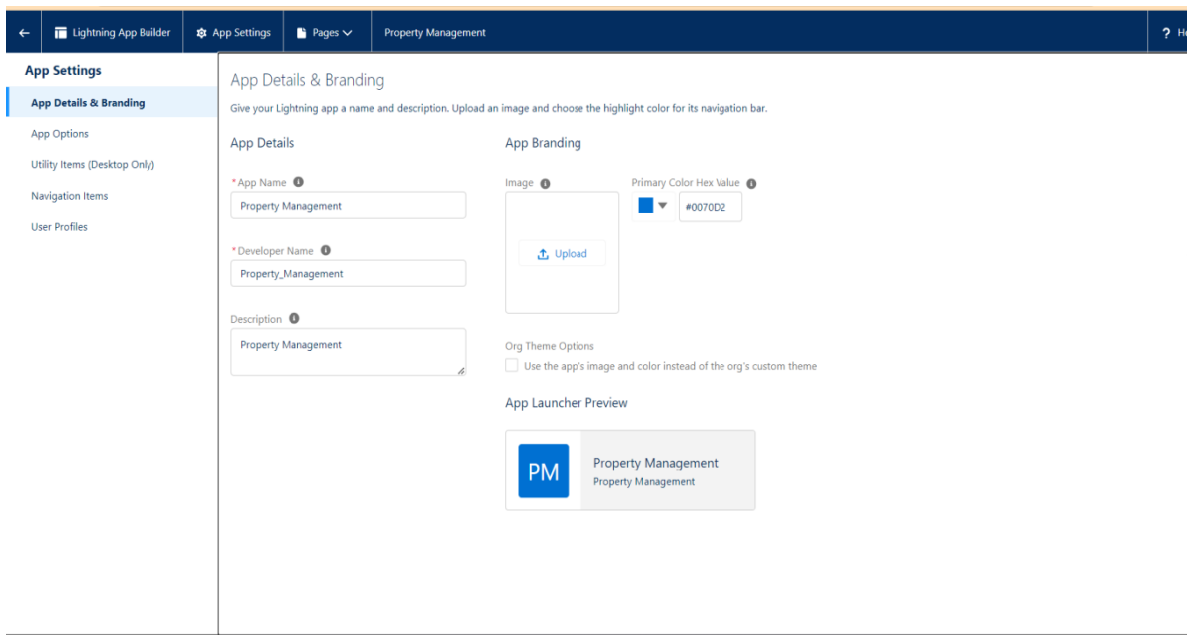Created Lightning Tab named Enquiry, Property and Loan as displayed in below image.
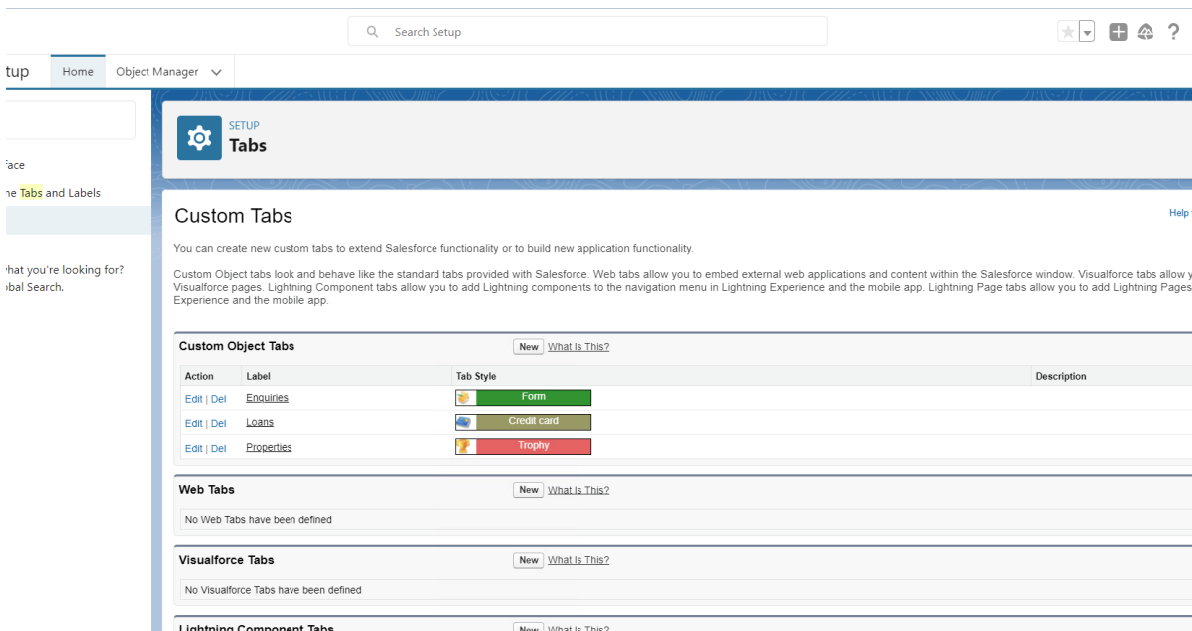
MILESTONE 4: The Lightning App
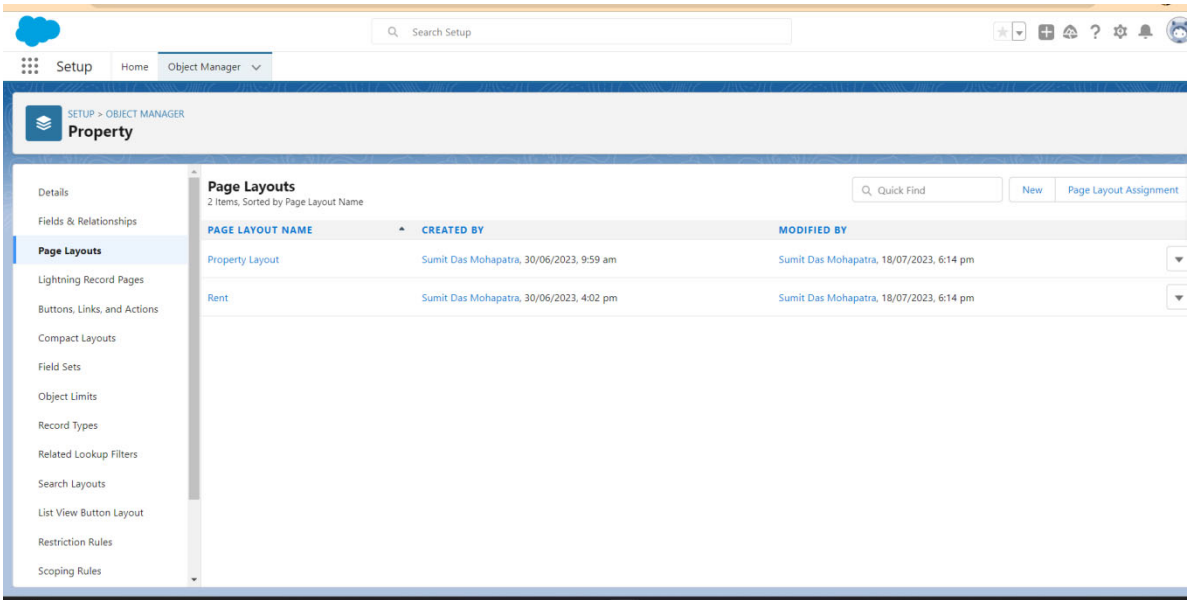
ACTIVITY 1: Create the Lightning App

Created Lightning Tab named Property Management as displayed in below image.
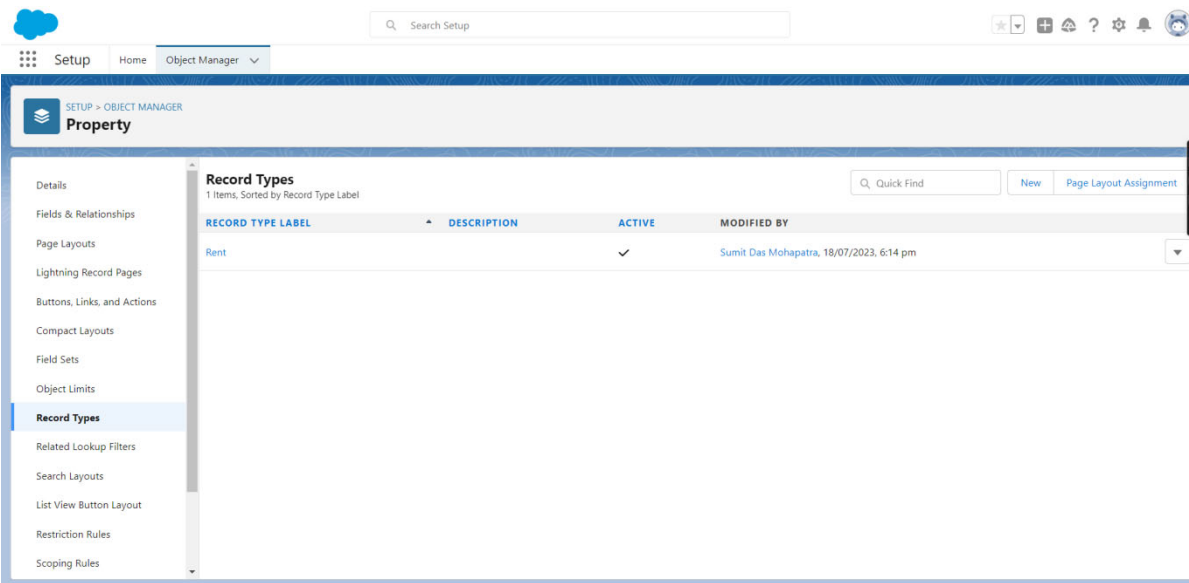
MILESTONE 5: Fields

ACTIVITY 1: Create Page Layout For Property Object and Rent Page Layout

Created Page Layout for Property Object as Property Layout and also Rent Page Layoutas displayed in below image.
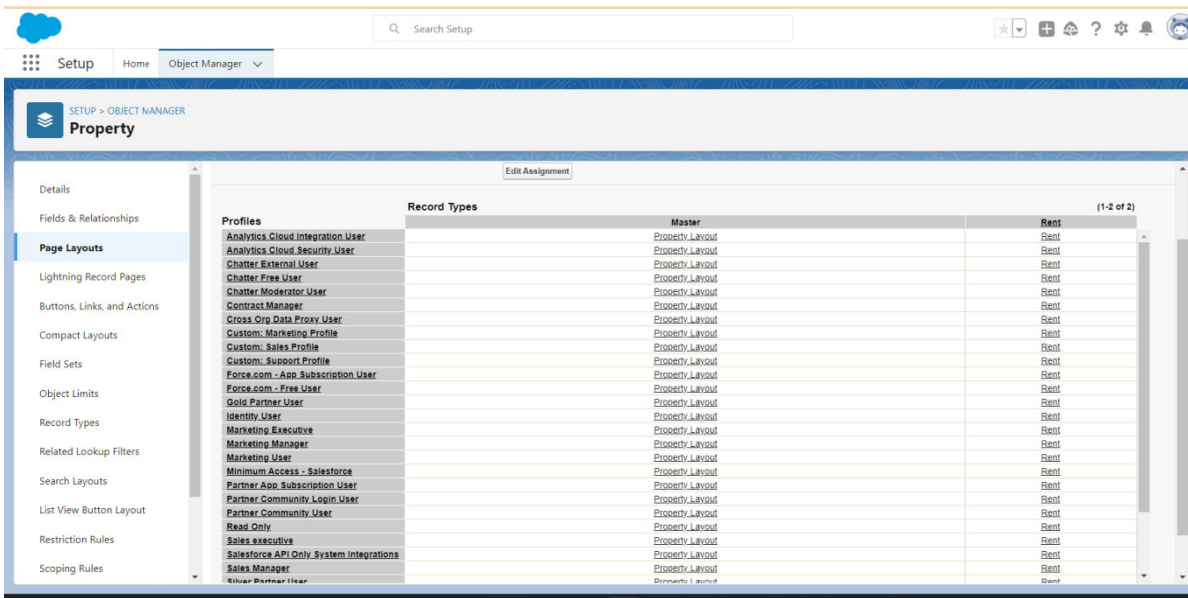

ACTIVITY 2: Create Record Type For Property Object

Created Record Type for Property Object as Buy and Rent as displayed in below image.

ACTIVITY 3: AssignPage Layout Assignment

Assigned Page Layout with record type for Property Layout and also Rent Page Layout as displayed in below image.
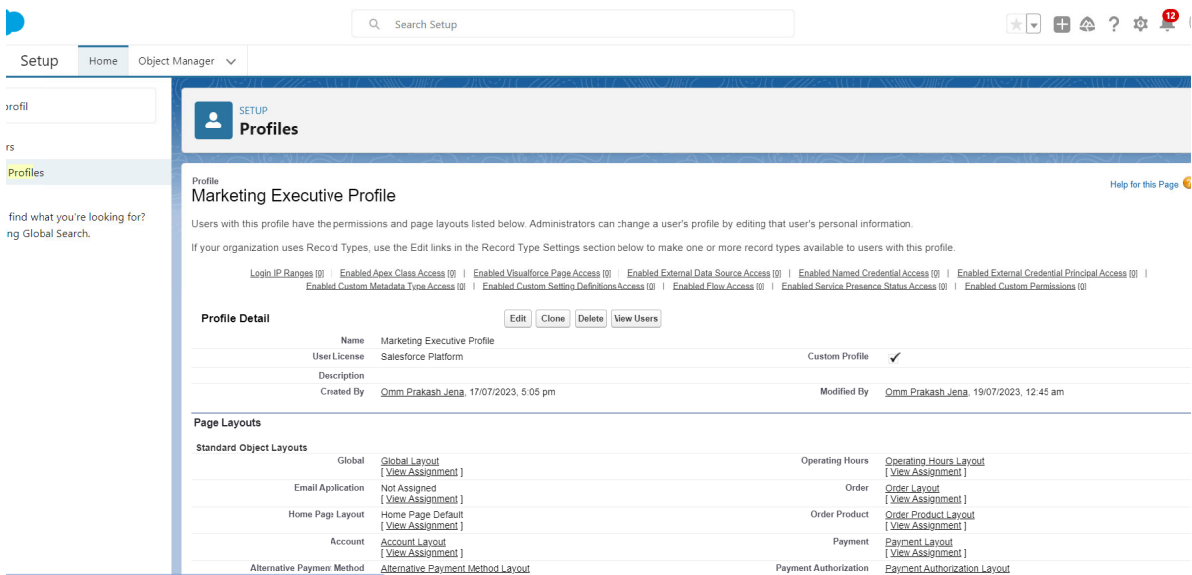

MILESTONE 6: Profile

ACTIVITY 1: Create A New Profile

Created new profile for the following and as displayed with images.

a) Marketing Executive profile

b) Marketing Manager profile

c) Sales Executive profile

d) Sales Manager profile

MILESTONE 7: User

ACTIVITY 1: Create User

Created new user named Sunny as displayed in below image.

MILESTONE 8: Permission Set

ACTIVITY 1: Create Permission Set

Created permission set with named Sales Rep Advance as displayed in below image.
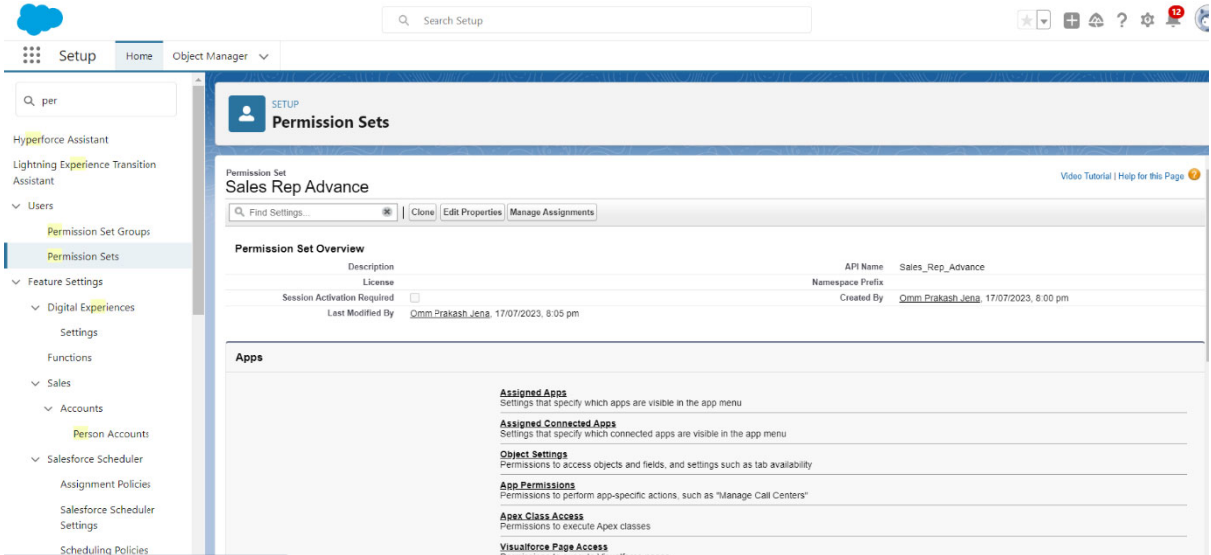
MILESTONE 9: Set Up For OWD

ACTIVITY 1: Create OWD Setting
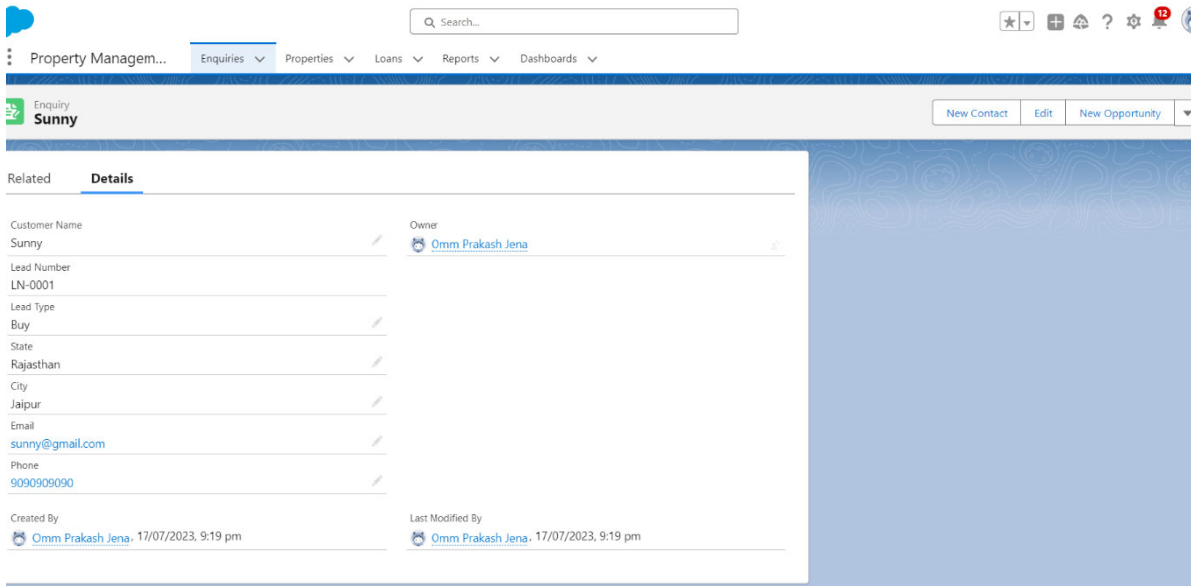
Setup the OWD Setting as displayed in below image.
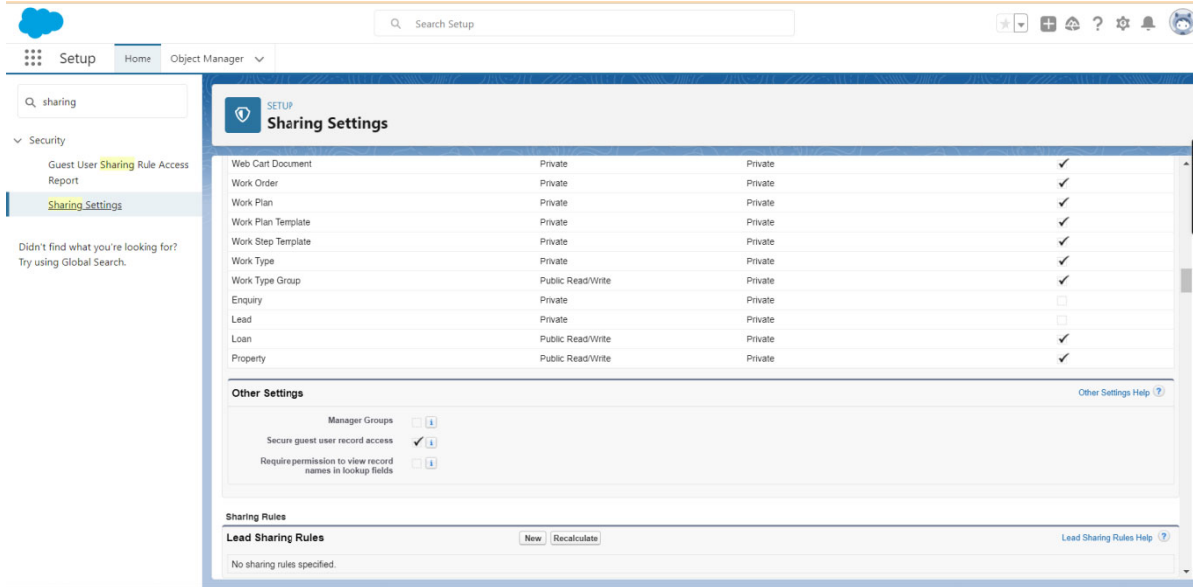
MILESTONE 10: User Adoption

ACTIVITY 1: Create, View Record for Enquiry

Created and Viewed the record as displayed in below image.
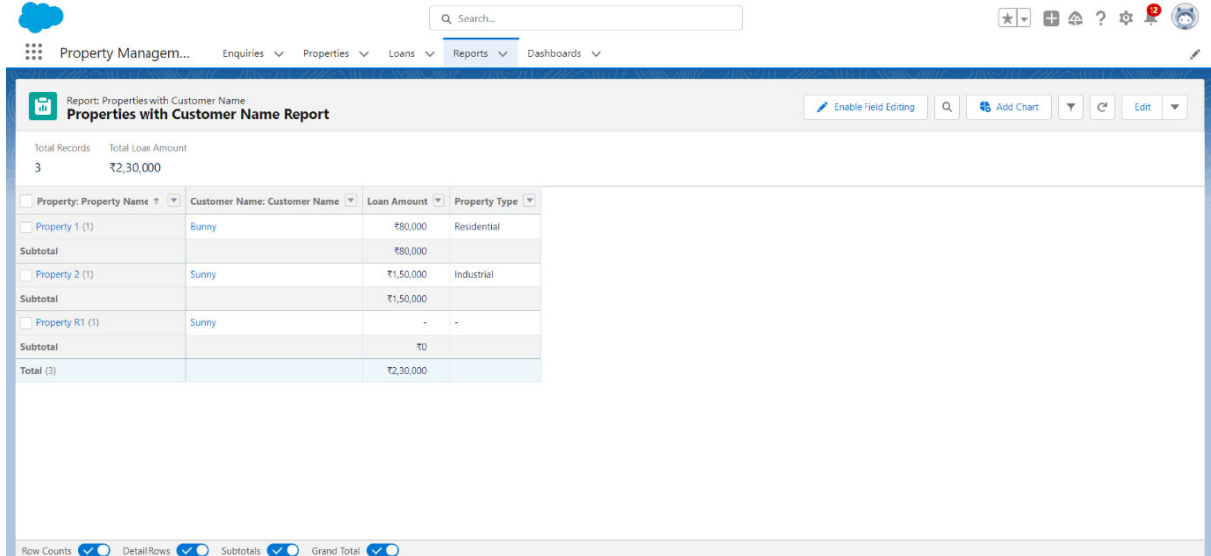
MILESTONE 11: Report

ACTIVITY 1: Create Report

Created the report as displayed in below image.

MILESTONE 12: Dashboards
ACTIVITY 1: Create Dashboards
Created the Dashboards as displayed in below image.
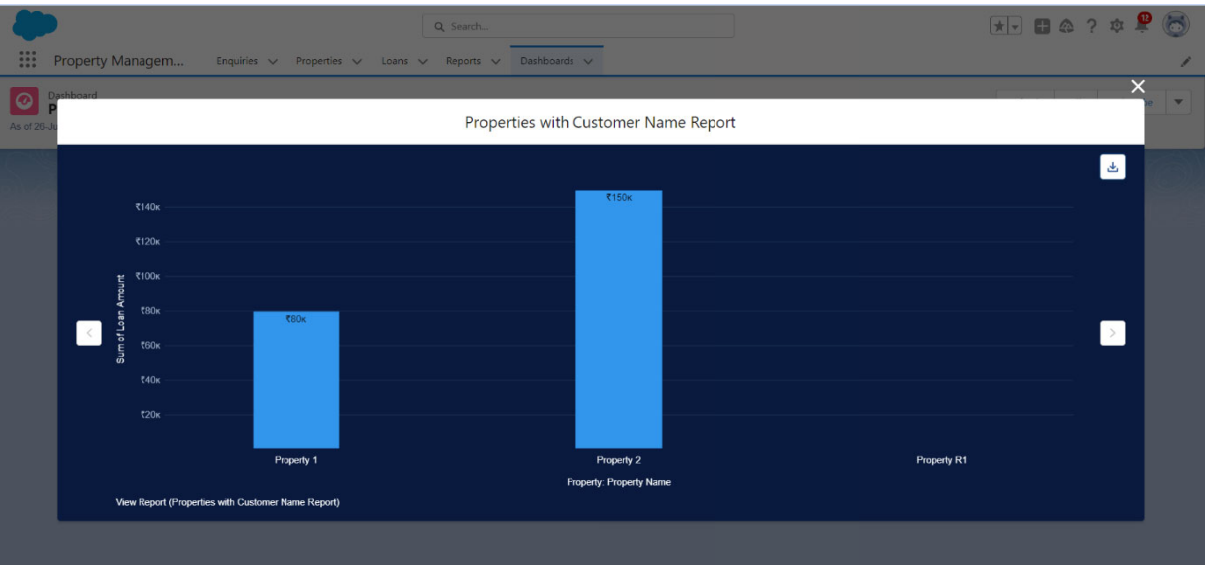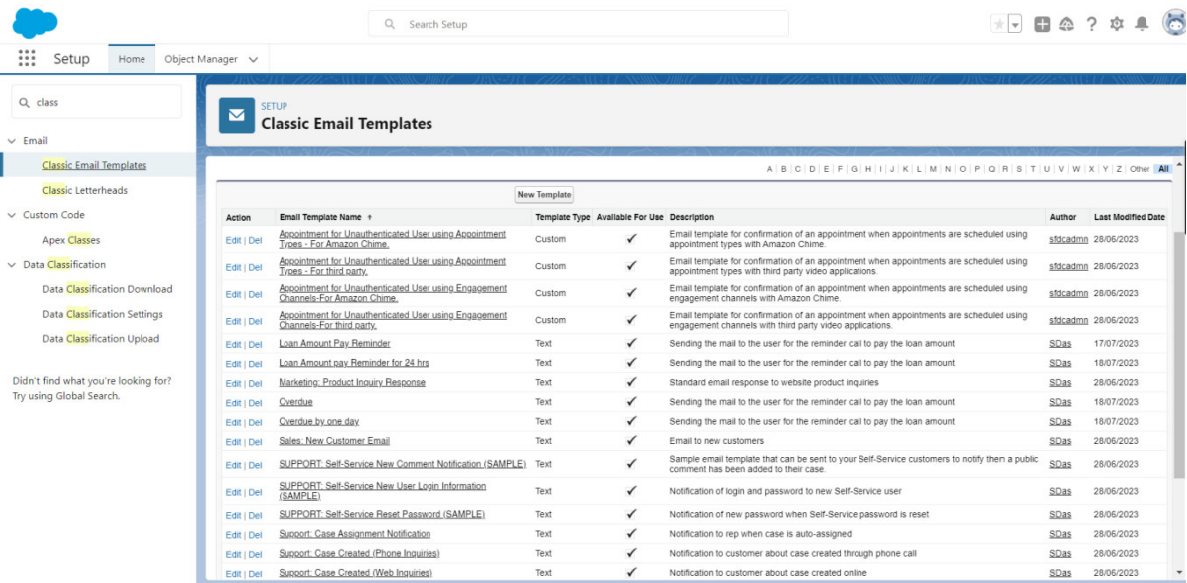
MILESTONE 13: Flow Builder
ACTIVITY 1: Create Classic Email Template
Created the Classic Email Template as displayed in below image.

ACTIVITY 2: Create the Email Alerts

Created the Email Alerts as displayed in below image.
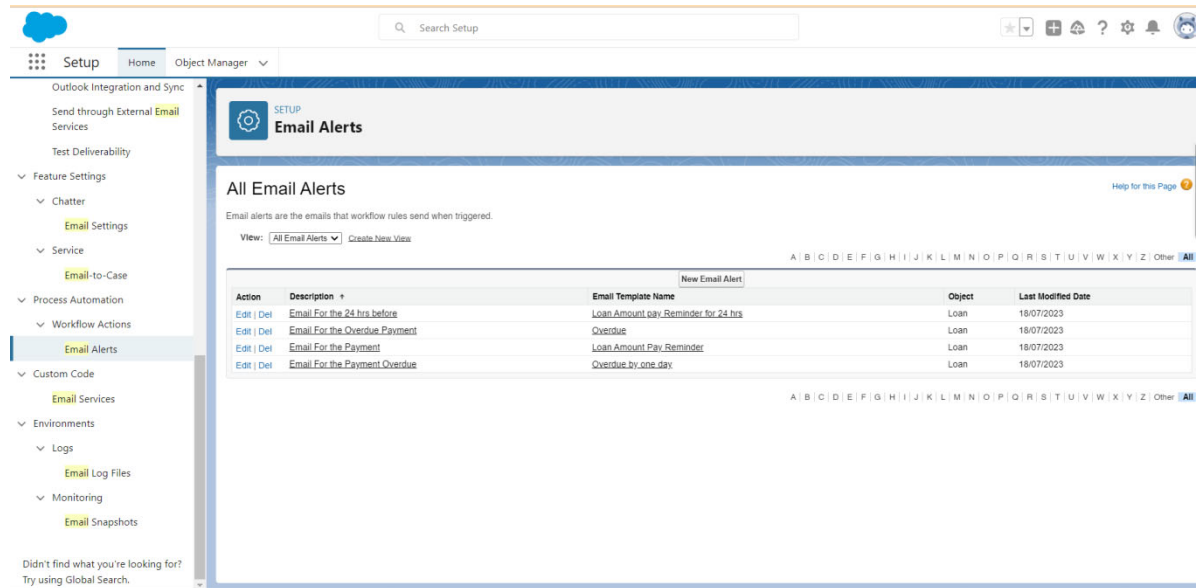
ACTIVITY 3: Create Flows
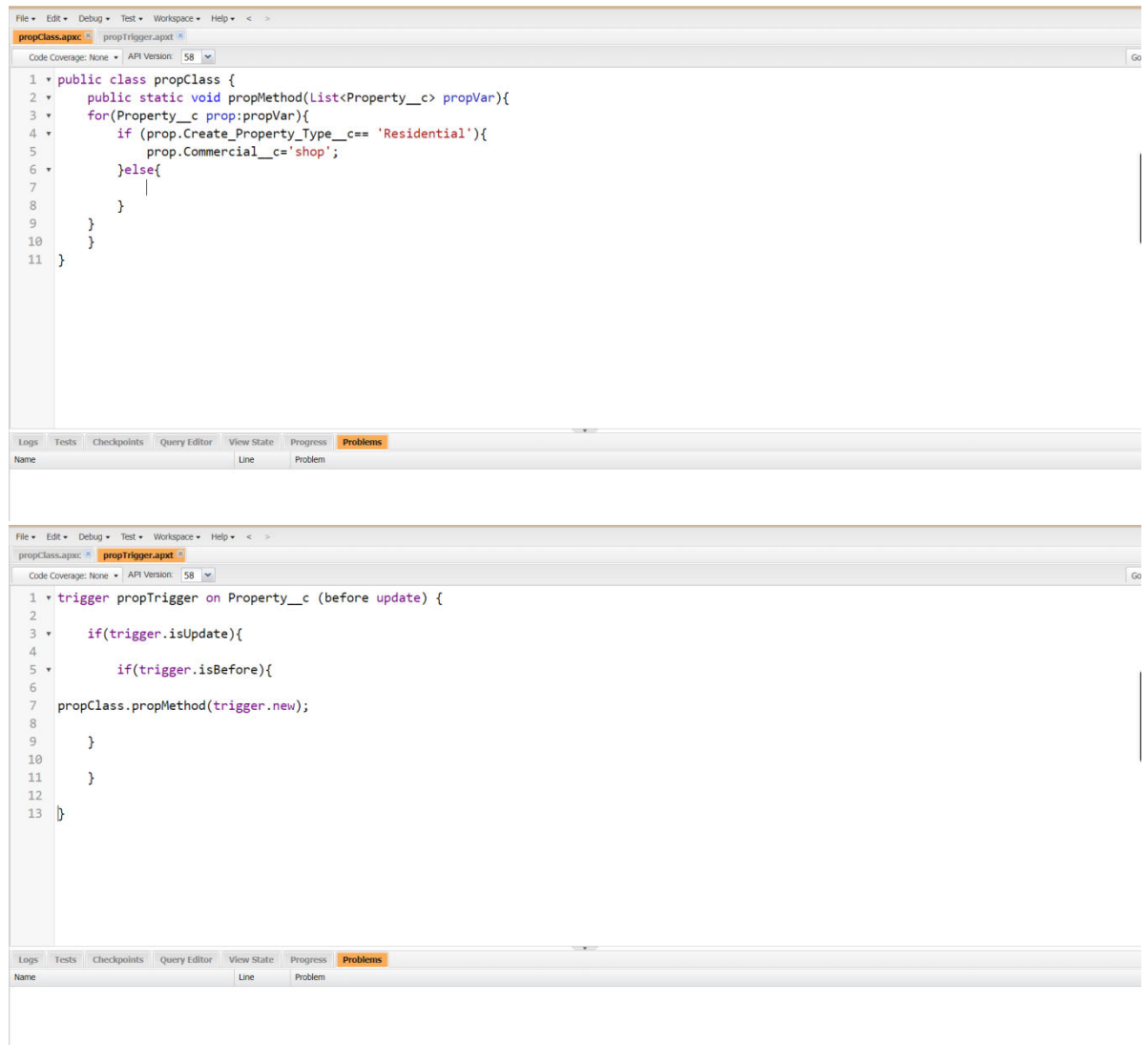
Created the Flow with decision and email alert as displayed in below image.
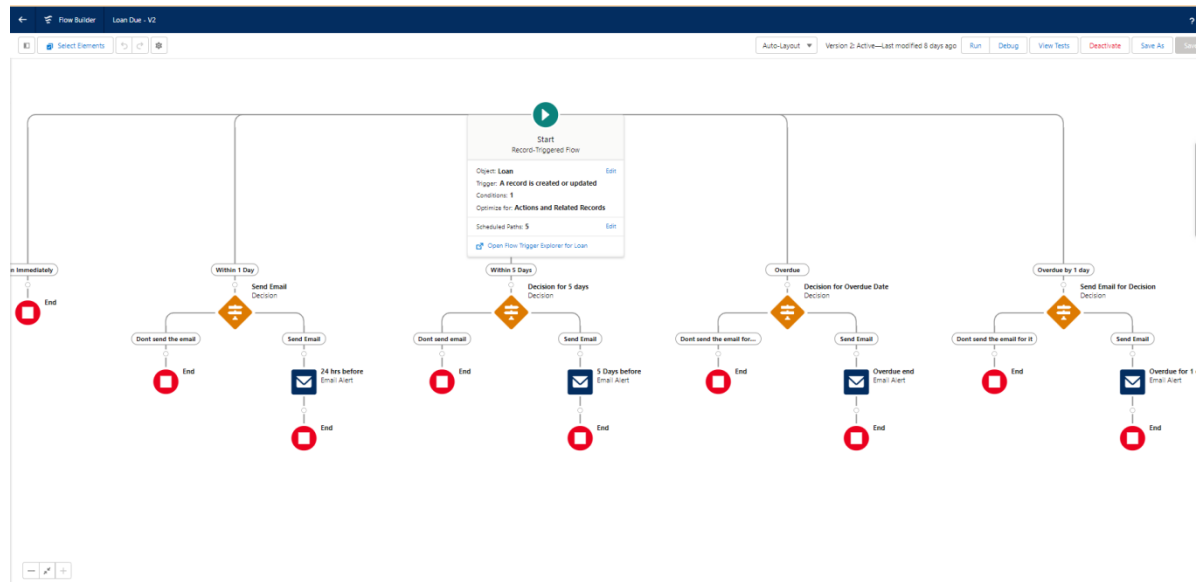
MILESTONE 14: Apex Triggers

ACTIVITY 1: Create Trigger

Created the two files of Apex Class and Apex Triggers as displayed in below image.

4. TRAILHEAD PROFILE PUBLIC URL:

My Trailhead profile public URL is:

https://www.salesforce.com/trailblazer/opjena3

5. ADVANTAGES AND DISADVANTAGES:

Advantages of the Property Management Salesforce Lightning App:

1. Data-Driven Decision Making: The app's reporting and dashboard features offer valuable insights into key performance metrics, such as the count of loans passed, properties purchased, and deals closed. This enables

management to make data-driven decisions and refine strategies for better outcomes.

2. **Increased Productivity and Collaboration:** The app centralizes property and buyer data, fostering collaboration among team members. This leads to increased productivity and a more coordinated approach to property management.

3. **Customizable and Scalable Solution:** Being built on the Salesforce Lightning platform, the app is highly customizable and can be tailored to meet specific business needs. It can also scale with the growth of the property management business.

4. **Enhanced User Experience:** With a focus on user-centric design, the app provides an intuitive and seamless user experience for both buyers and team members. This enhances user satisfaction and adoption rates.

5. **Competitive Advantage:** Implementing a sophisticated Salesforce Lightning app for property management provides a competitive advantage in the industry. It demonstrates the company's commitment to innovation and customer-centricity, attracting more buyers and investors.

Disadvantages of the Property Management Salesforce Lightning App:

1. **Maintenance and Upgrades:** Regular maintenance, updates, and improvements are necessary to keep the app running smoothly and aligned with evolving business needs. This could require ongoing development and additional costs.

2. **Potential Customization Limitations:** While Salesforce is highly customizable, certain complex customizations may not be achievable or might require significant effort. This could limit the app's flexibility in certain scenarios.

3. **Performance Issues:** Depending on the app's complexity and data volume, performance issues such as slow loading times or system lag might occur. Optimizing performance may be necessary to deliver a seamless user experience.

4. **Data Security Concerns:** Despite Salesforce's robust security features, any system handling sensitive customer data poses potential security risks. Regular security audits and measures are crucial to minimize vulnerabilities.

5. **Platform Dependency:** Developing the app on Salesforce makes the solution dependent on the platform's stability and availability. Any disruptions in Salesforce services could impact the app's functionality.

6. **Integration with Legacy Systems:** If the organization has legacy systems that are not compatible with Salesforce, integrating the app with these systems might be challenging and require additional effort.

7. **Limited Offline Functionality:** As Salesforce is primarily cloud-based, the app's offline functionality might be limited. This can be a disadvantage in scenarios with poor or no internet connectivity.

6. APPLICATION

Applications of the Property Management Salesforce Lightning App:

1. **Housing Associations:** Housing associations can use the app to manage their property portfolio, track tenants' requirements, and offer discounted housing options based on eligibility criteria. The app facilitates efficient tenant management and property allocation.

2. **Property Management Companies:** Companies offering property management services can benefit from the app by efficiently managing multiple properties, tracking tenant requirements, and optimizing property occupancy rates.

3. **Vacation Rental Agencies:** Vacation rental agencies can use the app to manage their rental properties, match travelers with suitable accommodations, and offer personalized deals to increase bookings and revenue.

4. **Commercial Real Estate Companies:** Companies dealing with commercial real estate can use the app to manage commercial properties, track potential buyers or tenants, and optimize leasing processes.

5. **Private Property Sellers:** Individuals selling their properties can utilize the app to reach potential buyers, showcase property details, and provide personalized offers to attract more interested parties.

6. **Asset Management Firms:** Asset management firms can use the app to track and manage their real estate assets, analyze performance, and make data-driven decisions for investment strategies.

7. CONCLUSION

The Property Management Salesforce Lightning App is a robust and flexible solution that transforms the property buying process and boosts efficiency in the real estate and property management sectors. With its streamlined property matching, personalized discounts, and accurate loan estimation features, buyers enjoy a more personalized and satisfying experience. Marketing and sales teams benefit from real-time data insights, leading to improved performance in closing deals. The app's robust security measures ensure the protection of sensitive information while offering distinct user profiles for marketing and sales teams. Additionally, the app's reporting and dashboard functionalities empower management with valuable insights, facilitating data-driven decision-making and enhancing overall business strategies. Ultimately, the Property Management Salesforce Lightning App serves as an innovative tool that fosters growth, enhances customer satisfaction, and provides a competitive edge in the dynamic and competitive property market.

8. FUTURESCOPE

Future Scopes of the Property Management Salesforce Lightning App:

1. **Integration with Smart Contracts:** Integrating the app with smart contracts can automate and secure property transactions, eliminating the need for intermediaries and reducing processing times.
2. **Mobile App Expansion:** Developing a mobile version of the app can offer greater convenience to buyers, marketing, and sales teams, allowing them to access essential features on the go.
3. **Voice-Enabled Assistant:** Implementing a voice-enabled assistant within the app can enhance user interactions, making it easier for buyers to search for properties and obtain relevant information using voice commands.
4. **Machine Learning for Lead Scoring:** Machine learning algorithms can be utilized to analyze buyer behavior and lead data, enabling more accurate lead scoring and prioritization for the sales teams.
5. **Integration with Third-Party Property Data Sources:** Expanding integration with external property data sources can provide users with access to a broader range of property listings and market insights.
6. **Global Expansion:** Scaling the app for global markets can cater to diverse property requirements and attract buyers and investors from different regions.