

# Property Management Application using Salesforce

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## INDRODUCTION

### Overview :

A property management application using Salesforce is a cloud-based platform designed to help property managers streamline their operations and manage their rental properties more efficiently. The application is built on the Salesforce platform, which provides a robust set of tools and features for managing customer relationships, data, and workflows.

The property management application can be customized to meet the unique needs of property managers, with features such as automated rent collection, maintenance tracking, tenant communication, financial reporting, property listings, tenant screening, lease management, and property analytics.

### Purpose

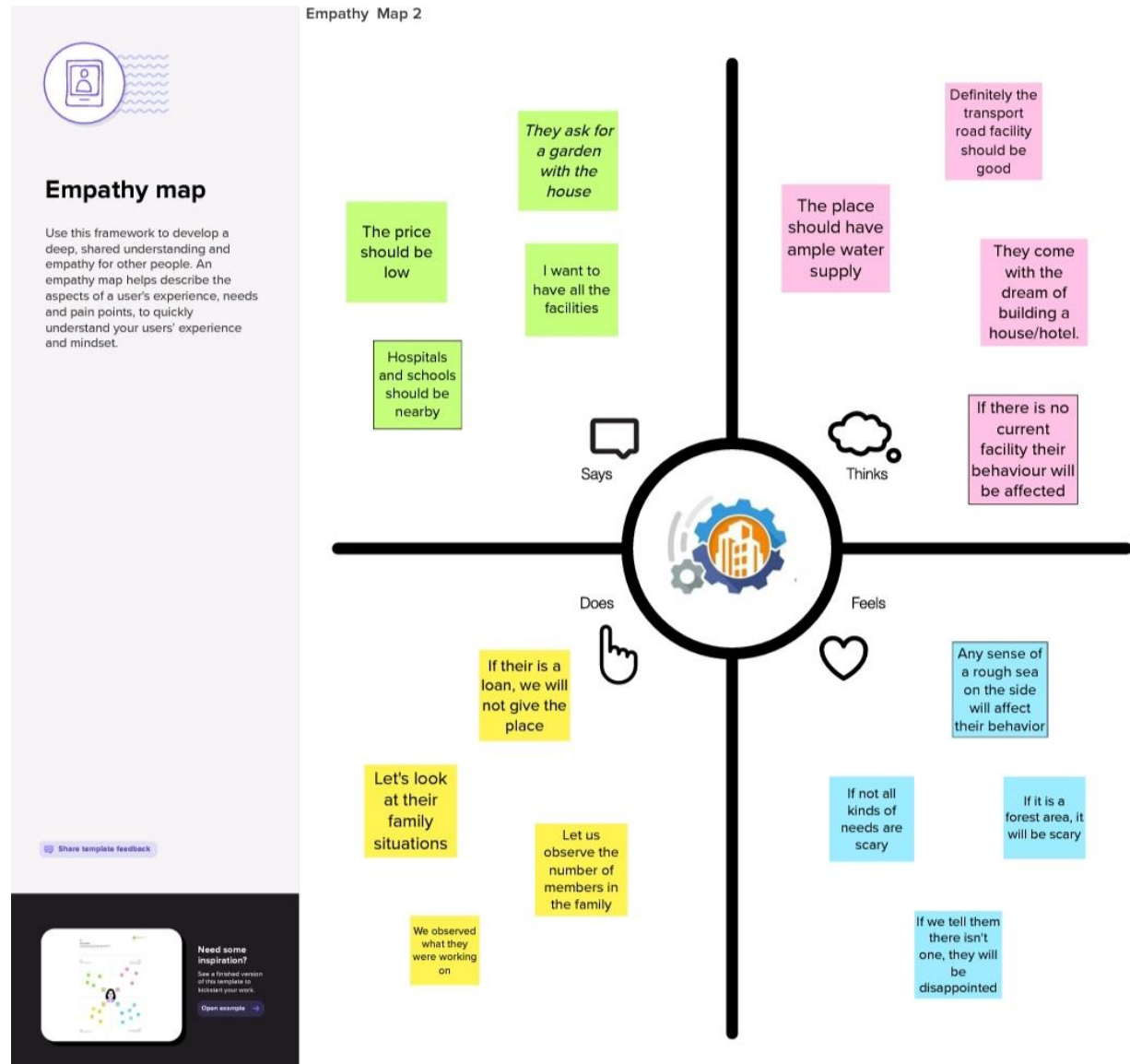
The purpose of a property management application using Salesforce is to provide property managers with a comprehensive and centralized platform for managing their rental properties. By utilizing the Salesforce platform, property managers can automate many of their day-to-day tasks, improve communication with tenants, track maintenance requests, and streamline rent collection.

The application can help property managers to stay organized, save time and effort, and ultimately provide better service to their tenants. It can also provide property managers with valuable insights into their financial performance, occupancy rates, and other key metrics, enabling them to make data-driven decisions about their properties.

Overall, the purpose of a property management application using Salesforce is to help property managers to maximize their efficiency and effectiveness, while improving tenant satisfaction and ultimately driving greater returns from their rental properties.

# Problem Definition & Design Thinking

## Empathy Map



## Ideation & Brainstorming Map

## 2 Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

**Tip** The car below is a study case and in the parent (ask to be checked) even to start drawing!

### Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

29 minutes

**TIP**  
Add conservative tags to sticky notes to make it easier to find, locate, organize, and categorize important ideas as they relate to your model.

A mobile application that would enable property managers to access the application on the go, with the ability to view and manage properties, tenants, and requests from their mobile devices.

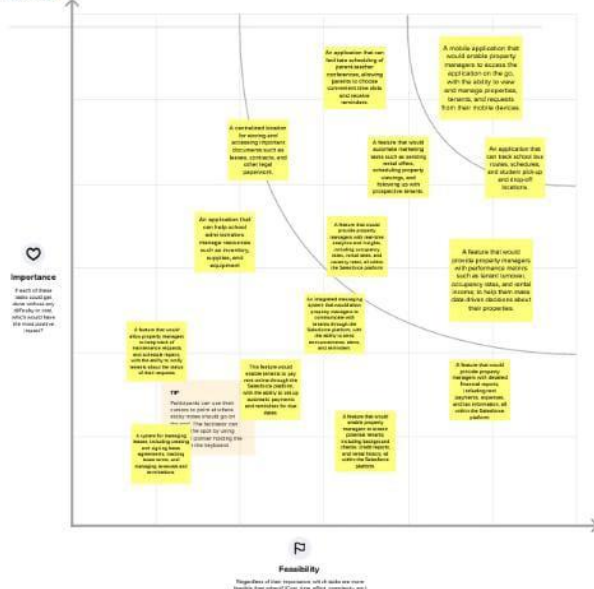
A feature that would provide property managers with performance metrics such as tenant turnover, occupancy rates, and rental income, to help them make data-driven decisions about their properties.



 **Prioritize**

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

Ⓢ 30 minutes



 After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

Quick add-on

- Share the mural**  
Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.
- Export the mural**  
Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.

Keep moving forward

- 
**Strategy Blueprint**  
 Define the components of a new idea or strategy  
 Open the template →
  - 
**Customer experience journey map**  
 Understand customer needs, motivations, and obstacles for an experience  
 Open the template →
  - 
**Strengths, weaknesses, opportunities & threats**  
 Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan  
 Open the template →

 Share template feedback

## RESULT

### Data Model :

Object name	Field in the object	
Buy	Field lable	Data type
	State	picklist
	Property type	picklist
	Discount	percent
Rent	Rental city	Text
	BHK type	Pick list
	rent	Auto number

Loan	Tota loan installation		number
	Term		Number
	Loan repayment		Number
	Loan name		Text
	Loan amount		Formula
	Intereste rate		currency
	Annual loan		Number
Lead	State		picklist
	phone		phone
	Lead name		Text
	lead		Auto number
	Email		Email
	City		Picklist

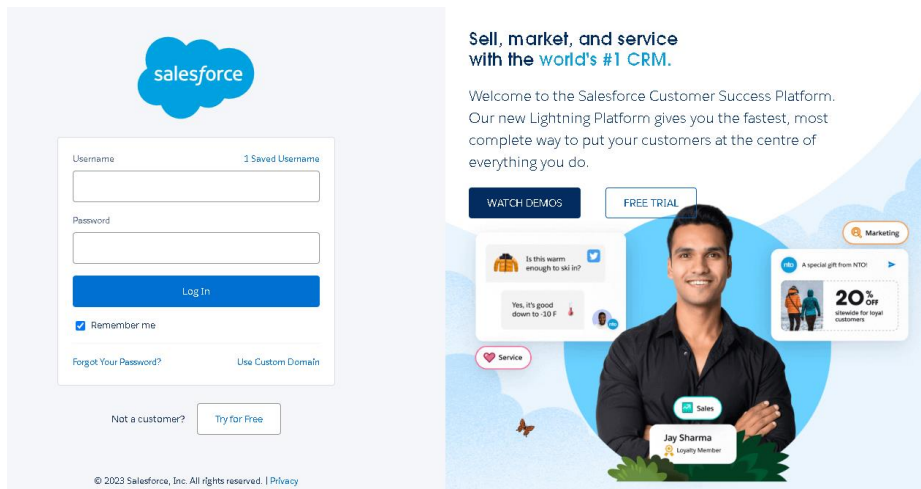
## Activity & ScreenShot

### Milestone 1: Creation Salesforce Org:

#### Activity 1:

Creating Developer Account

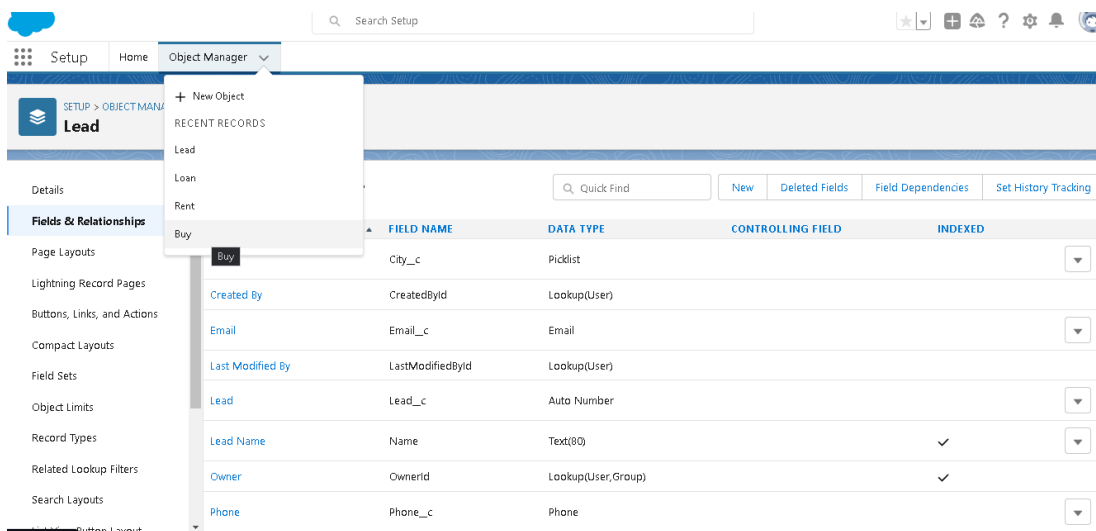
Creating a developer org in salesforce.



### Milestone-2:Object

#### Activity 1 and 2 and 3: To Create an object:

Creation of Objects for Vehicle Management, For this Vehicle Management to creating four objects i.e *Buy , loan , rent ,Rent* .



## Milestone-3: Tab

### Activity-1,2,3 and 4 :

#### Creating the Lightning tab for the objects Buy , Rent , Loan , Lead

Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Buyers</a>	Ball	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Leads</a>	Airplane	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Loans</a>	Leaf	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Rents</a>	Globe	

**Web Tabs** [New](#) [What is This?](#)  
No Web Tabs have been defined

**Visualforce Tabs** [New](#) [What is This?](#)  
No Visualforce Tabs have been defined

**Lightning Component Tabs** [New](#) [What is This?](#)

## Milestone-4:Lightning App

### Activity-1:

#### Creating the **Property Management** app

Lightning App Builder

App Settings

Pages

Property management

Back

Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

App Details

\*App Name

Property management

\*Developer Name

Parameshwari

Description

Enter a description...

App Branding

Image

Upload

Primary Color Hex Value

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Pm

Property management

## Milestone -5 :Fields and Relationship

### Activity-1 , 2 and 3 : Creation of fields:

Creating a Fields in Buy , rent , Loan , Lead objects

SETUP > OBJECT MANAGER

Loan

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_Loan__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Load Id	Load_Id__c	Auto Number		
Loan Amount	Loan_Amount__c	Formula (Currency)		
Loan Name	Name	Text(80)		✓
Loan Repayment	Loan_Repayment__c	Number(18, 0)		



SETUP > OBJECT MANAGER

Buy

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Property Type	Property_Type__c	Picklist		
State	State__c	Picklist		

Search Setup

Setup

Home

Object Manager

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK type	BHK_type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rent	Rent__c	Auto Number		
Rent Name	Name	Text(80)		✓
Rental City	Rental_City__c	Text(40)		

<div> <div> </div> <div> <div>SETUP &gt; OBJECT MANAGER</div> <div>Lead</div> </div> </div>																																																	
<div> <div>Details</div> <div>Fields &amp; Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>List View Button Layout</div> </div>	<div> <div>Fields &amp; Relationships</div> <div>9 Items, Sorted by Field Label</div> <div> <div>Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div> <table> <tr> <th>FIELD LABEL</th><th>FIELD NAME</th><th>DATA TYPE</th><th>CONTROLLING FIELD</th><th>INDEXED</th></tr> <tr> <td>City</td><td>City__c</td><td>Picklist</td><td></td><td></td></tr> <tr> <td>Created By</td><td>CreatedById</td><td>Lookup(User)</td><td></td><td></td></tr> <tr> <td>Email</td><td>Email__c</td><td>Email</td><td></td><td></td></tr> <tr> <td>Last Modified By</td><td>LastModifiedById</td><td>Lookup(User)</td><td></td><td></td></tr> <tr> <td>Lead</td><td>Lead__c</td><td>Auto Number</td><td></td><td></td></tr> <tr> <td>Lead Name</td><td>Name</td><td>Text(80)</td><td></td><td>✓</td></tr> <tr> <td>Owner</td><td>OwnerId</td><td>Lookup(User,Group)</td><td></td><td>✓</td></tr> <tr> <td>Phone</td><td>Phone__c</td><td>Phone</td><td></td><td></td></tr> </table>				FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	City	City__c	Picklist			Created By	CreatedById	Lookup(User)			Email	Email__c	Email			Last Modified By	LastModifiedById	Lookup(User)			Lead	Lead__c	Auto Number			Lead Name	Name	Text(80)		✓	Owner	OwnerId	Lookup(User,Group)		✓	Phone	Phone__c	Phone		
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED																																													
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Lead Name	Name	Text(80)		✓																																													
Owner	OwnerId	Lookup(User,Group)		✓																																													
Phone	Phone__c	Phone																																															

Milestone-6: Profile

Activity 1:

Creating a Profiles:  
create a Sales manager and set its object permissions.

Setup

Home

Object Manager

profile

Users

Profiles

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

SETUP

Profiles

Profile

Sales Manager

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.

Login IP Ranges [0]

Enabled Apex Class Access [0]

Enabled Visualforce Page Access [0]

Enabled External Data Source Access [0]

Enabled Named Credential Access [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]

Profile Detail

Edit

Clone

Delete

View Users

Name	Sales Manager	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Parameshwari L.	Modified By	Parameshwari L.
	16/04/2023, 11:00 pm		16/04/2023, 11:15 pm

Page Layouts

Standard Object Layouts

Global	<div>Global Layout</div> <div>View Assignment</div>	Object Milestone	<div>Object Milestone Layout</div> <div>View Assignment</div>
Email Application	<div>Not Assigned</div> <div>View Assignment</div>	Operating Hours	<div>Operating Hours Layout</div> <div>View Assignment</div>
Home Page Layout	<div>DE Default</div> <div>View Assignment</div>	Opportunity	<div>Opportunity Layout</div> <div>View Assignment</div>

Activity 2:

## Creating a Profiles:

create a marketing manager, marketing executive 1 and 2 set its object permissions

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profile' and a list with 'Users' and 'Profiles' (selected). The main content area is titled 'Profiles' and shows the details for the 'Marketing Manager' profile. It includes a list of enabled permissions, a 'Profile Detail' table, and a 'Page Layouts' section with 'Standard Object Layouts'.

**Profile: Marketing Manager**

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.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [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 \[0\]](#)

**Profile Detail**

Name	Marketing Manager		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	Parameshwari L, 16/04/2023, 11:03 pm	Modified By	Parameshwari L, 17/04/2023, 12:05 am

**Page Layouts**

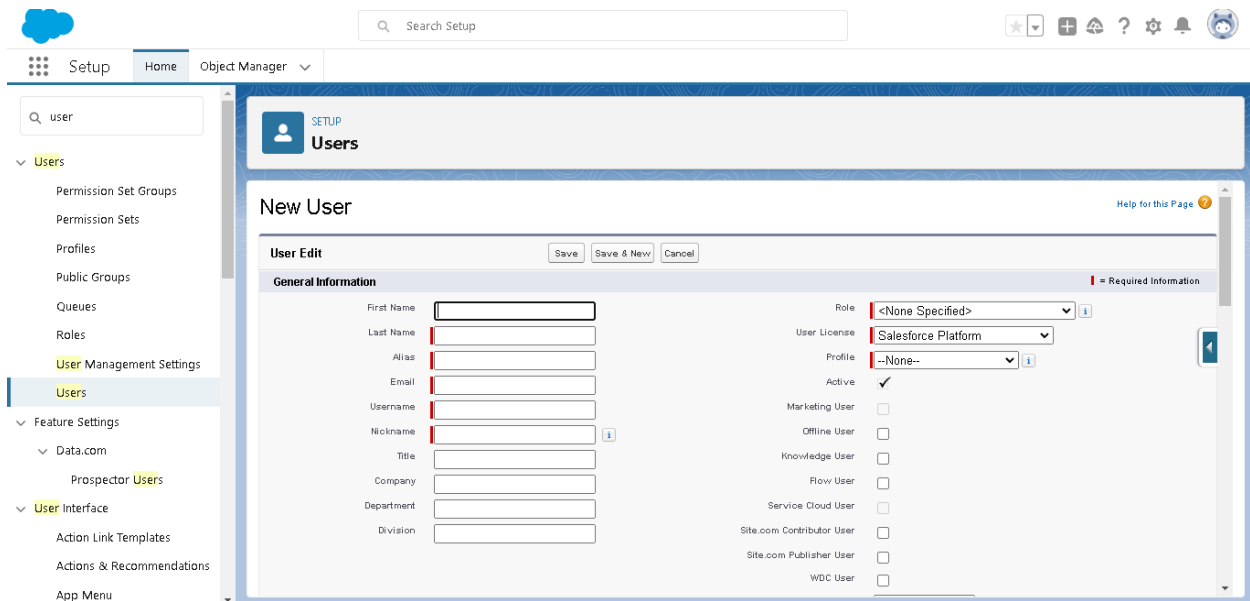
**Standard Object Layouts**

Global	<a href="#">Global Layout</a> ( <a href="#">View Assignment</a> )	Object Milestone	<a href="#">Object Milestone Layout</a> ( <a href="#">View Assignment</a> )
Email Application	Not Assigned ( <a href="#">View Assignment</a> )	Operating Hours	<a href="#">Operating Hours Layout</a> ( <a href="#">View Assignment</a> )
Home Page Layout	<a href="#">Home Page Default</a> ( <a href="#">View Assignment</a> )	Order	<a href="#">Order Layout</a> ( <a href="#">View Assignment</a> )

## Milestone-7: Users

### Activity 1:

Creating a Users:

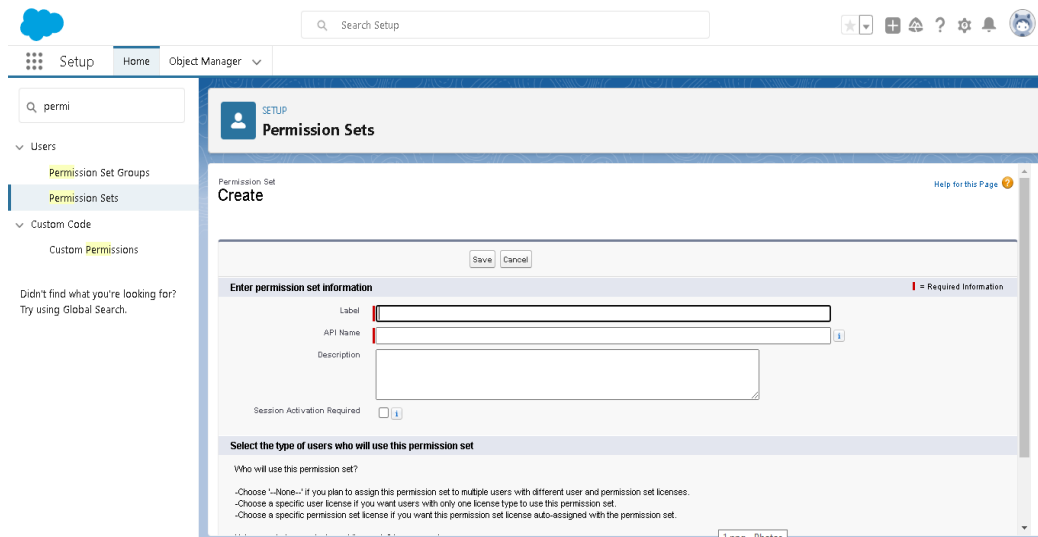


The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'user' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (highlighted), Feature Settings, Data.com, Prospector Users, User Interface, Action Link Templates, Actions & Recommendations, and App Menu. The main content area is titled 'New User' and contains a 'User Edit' form. The form has tabs for 'General Information' and 'Permissions'. The 'General Information' tab is active, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. On the right, there are dropdowns for Role (set to '<None Specified>'), User License (set to 'Salesforce Platform'), and Profile (set to '--None--'). Below these are checkboxes for Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. At the top of the form, there are 'Save', 'Save & New', and 'Cancel' buttons. A red bar at the top right of the form indicates required information.

## Milestone-8: Permission sets

### Activity 1:

#### Creating the permissions set



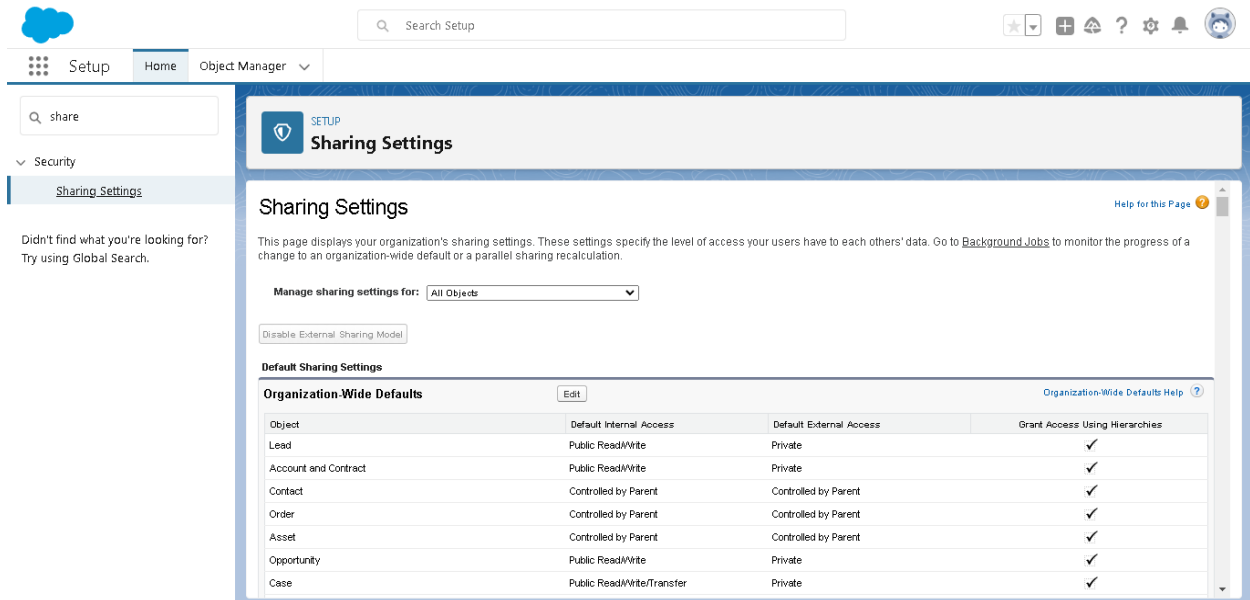
The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'permi' and a list of navigation items: Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and contains a 'Create' form. The form has tabs for 'Enter permission set information' and 'Select the type of users who will use this permission set'. The 'Enter permission set information' tab is active, showing fields for Label, API Name, and Description. Below these is a checkbox for 'Session Activation Required'. At the bottom, there is a section titled 'Select the type of users who will use this permission set' with instructions on how to choose the user type. At the top of the form, there are 'Save' and 'Cancel' buttons. A red bar at the top right of the form indicates required information.

## Milestone-9:setup for owd

## Activity 1:

### Reports

#### Creating the OWD settings



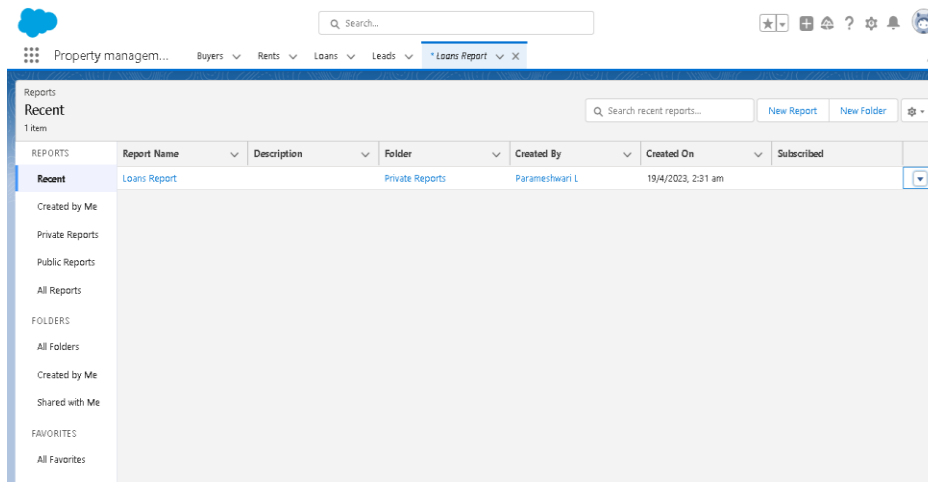
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "share" and a list of navigation items: Setup, Home, Object Manager, Security, and Sharing Settings. The main content area is titled "Sharing Settings" and includes a search bar, a "Manage sharing settings for:" dropdown set to "All Objects", and a "Disable External Sharing Model" button. Below this is the "Default Sharing Settings" section, which includes an "Organization-Wide Defaults" table. The table has columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The data rows are as follows:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write	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	✓

## Milestone-9:Reports

### Activity 1: Reports

#### Creating a Report for loan

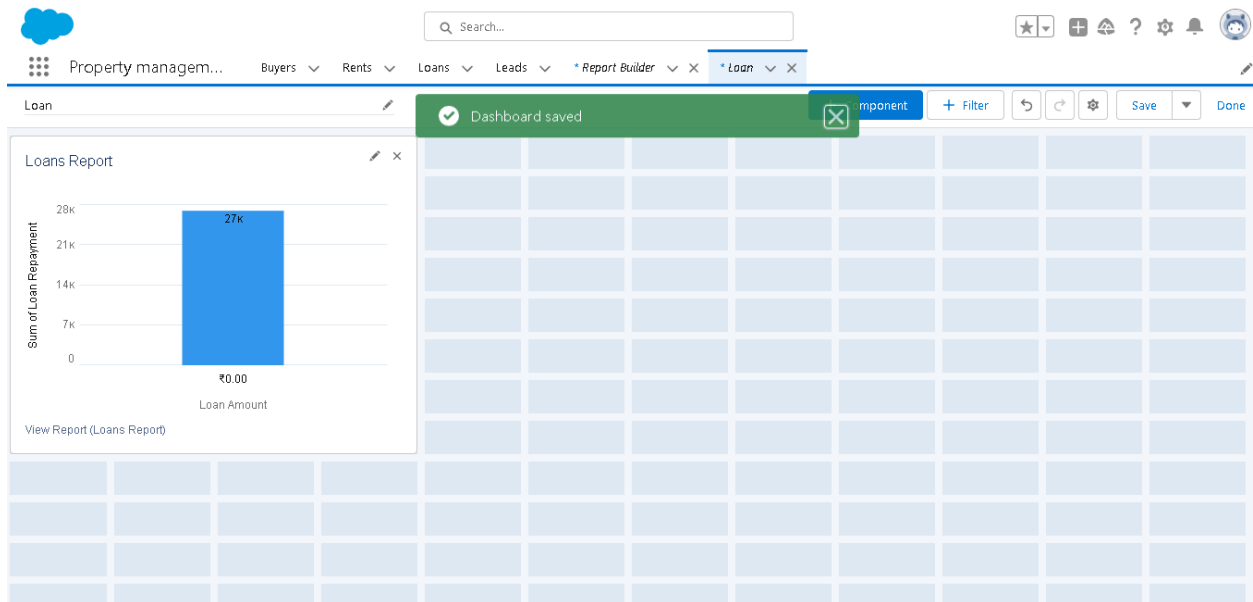


The screenshot shows the Salesforce Reports page. The top navigation bar includes a search bar, a "Search..." button, and a "New Report" button. The left sidebar has a "Recent" section with a list of reports: "Loans Report" (created by Parameshwari L on 19/4/2023, 2:31 am), "Created by Me", "Private Reports", "Public Reports", "All Reports", "FOLDERS", "All Folders", "Created by Me", "Shared with Me", "FAVORITES", and "All Favorites". The main content area displays a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The "Loans Report" is listed under the "Private Reports" folder.

## Milestone-10: Dashboard

## Activity 1:

### Creating the dashboard



## Trailhead Profile Public URL

**Team Leader** - <https://trailblazer.me/id/paramu07>

**Team Member 1** - <https://trailblazer.me/id/priyc14>

**Team Member 2** - <https://trailblazer.me/id/pandee5>

**Team Member 3** - <http://trailblazer.me/ld/saras340>

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## **Advantages & Dis advantages**

### **Advantages:**

**Customization:** Salesforce is highly customizable, allowing property management companies to tailor the application to their specific needs and preferences.

**Integration:** Salesforce can integrate with a wide range of third-party applications and services, enabling property managers to leverage existing tools and data to improve their operations.

**Accessibility:** Salesforce is cloud-based, meaning that property managers can access the application from anywhere, at any time, and on any device with an internet connection.

**Security:** Salesforce has robust security measures in place, ensuring that sensitive data such as tenant information, financial data, and legal documents are kept secure.

**Scalability:** Salesforce can scale to meet the needs of property management companies of all sizes, from small property management firms to large real estate companies.

**Automation:** Salesforce allows for the automation of many property management tasks such as rent collection, maintenance tracking, and tenant communication, reducing the workload for property managers and improving efficiency.

**Disadvantages:**

**Cost:** Salesforce can be expensive, especially for smaller property management firms, with costs ranging from hundreds to thousands of dollars per user per month.

**Learning curve:** Salesforce can be complex and may require a significant learning curve, which may be challenging for property managers who are not familiar with the platform.

**Dependence on technology:** Salesforce is reliant on technology, meaning that technical issues or downtime can disrupt property management operations and impact tenant satisfaction.

**Limited features:** While Salesforce offers a wide range of features and customizations, there may be some features that property managers require that are not available on the platform.

**Data migration:** Migrating data from an existing property management system to Salesforce can be challenging and time-consuming, requiring significant planning and coordination.

**Training and support:** While Salesforce provides extensive training and support resources, property managers may require additional training or support to ensure that they can use the platform effectively.



## APPLICATIONS

A property management application using Salesforce would be a powerful tool for managing rental properties and tenants. Here are some features that could be included in the application:

**Dashboard:** A customizable dashboard that provides property managers with an overview of their properties, tenants, and key performance metrics.

**Tenant Management:** A system for managing tenants, including their personal information, lease agreements, rent payments, and maintenance requests.

**Property Management:** A system for managing properties, including their location, size, amenities, and rental history.

**Maintenance Tracking:** A feature that would allow property managers to keep track of maintenance requests and schedule repairs, with the ability to notify tenants about the status of their requests.

**Rent Collection:** An automated rent collection feature that would enable tenants to pay rent online through the Salesforce platform, with the ability to set up automatic payments and reminders for due dates

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## CONCLUSION

In conclusion, a property management application using Salesforce can provide many valuable features and benefits for property managers and tenants alike. Prioritizing features such as automated rent collection, maintenance tracking, tenant communication, tenant portal, and mobile access can improve the efficiency and effectiveness of property management. Other features such as vendor management, document management, marketing automation, task management, and performance analytics can also be valuable but may be less essential depending on the specific needs of the property manager. By using Salesforce as the platform for the property management application, property managers can benefit from the robust capabilities of Salesforce and the ability to integrate with other Salesforce apps and services.

## FUTURE SCOPE

The future scope for a property management application using Salesforce is vast, as the real estate industry continues to evolve and new technologies emerge. Here are some potential areas of growth and development:

**Artificial intelligence:** With the development of artificial intelligence, property management applications could utilize AI to automate processes such as rent collection, maintenance requests, and tenant screening.

**Internet of Things:** As more properties are equipped with smart devices such as thermostats, security systems, and sensors, property management applications could integrate with these devices to provide real-time data and insights.

**Predictive analytics:** By leveraging data analytics and machine learning, property management applications could provide predictive insights on tenant behavior, maintenance needs, and market trends.

**Blockchain:** The use of blockchain technology could enable property managers to securely and efficiently manage lease agreements, rental payments, and other important documents.