1   INTRODUCTION

1.1 Overview

property management system is a software application for the operations of hospitality accommodations and commercial residential rental properties.

1.2 Purpose

In creating budgets, advertise rental properties, qualify tenants, and collect rent.

2   ProblemDefinition& DesignThinking

2.1 EmpathyMap

2.2 Ideation&BrainstormingMap

3   RESULT

3.1 DataModel:

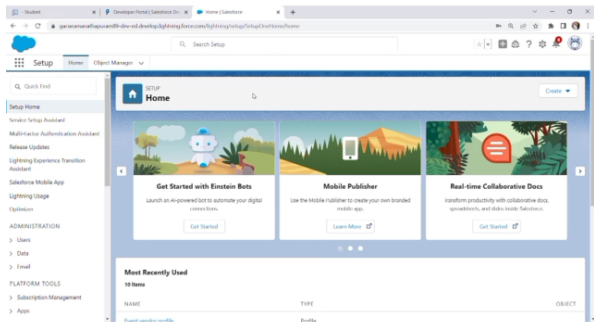| Objectname	FieldsintheObject	
Buy	Field dependency	Data type
	State	Email
	City	Phone
Lead		

3.2 Activity&Screenshot

Creating Developer Account

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/

2. Click on sign up.

3. On the sign up form, enter the following details :

a. First name & Last name

b. Email

c. Role : Developer

d. Company : College Name

e. County : India

f. Postal Code : pin code

g. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign up after filling these.

MILE STONE 2:

Create Object Buy

1. To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom

Object.

3. Enter the label name → Buy

4. plural label name → Buyers

5. click on Allow reports,

6. Allow search → Save

Activity3:

Create Object Rent

1. To create an object:

2. From the setup page → Click on Object Manager → Click on Create → Click on Custom

Object.

3. Enter the label name→Rent

4. plural label name→ Rents

5. click on Allow reports,

6. Allow search → Save

Activity3:

Create Object Loan

7. To create an object:

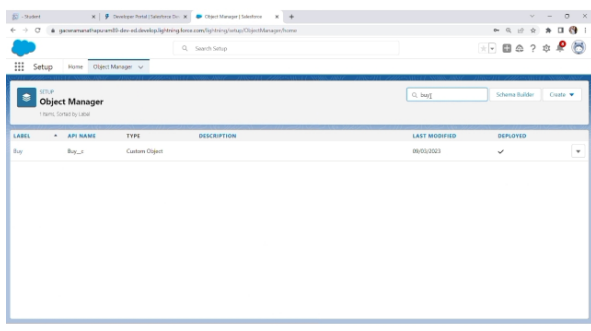8. From the setup page → Click on Object Manager → Click on Create → Click on Custom

Object.

9. Enter the label name→Loan

10. plural label name→ Loans

11. click on Allow reports,

12.Allow search → Save

MILE STONE 3:

To create a Tab:(Buy)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom

object tab)

2. Select Object(Buy) → Select the tab style → Next (Add to profiles page) keep it as

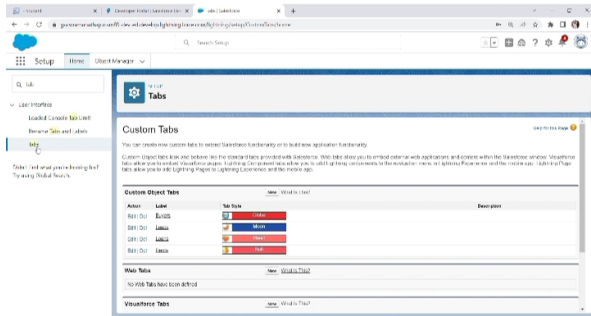default → Next (Add to Custom App) keep it as default → Save.

Activity 3:

To create a Tab:(Rent)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom

object tab)

2. Select Object(Rent) → Select the tab style → Next (Add to profiles page) keep it as

default → Next (Add to Custom App) keep it as default → Save

MILE STONE 4:

Create the Lightning App

1. Go to setup page → search "app manager" in quick find → select "app manager" → clickh "app manager" on New lightning App.

2. Fill the app name as an Property Management in app details and branding → Next →

(App option page) keep it as default → Next

3. (Utility Items) keep it as default → Next → (Add Navigation Items)(add tabs Lead, Buy,

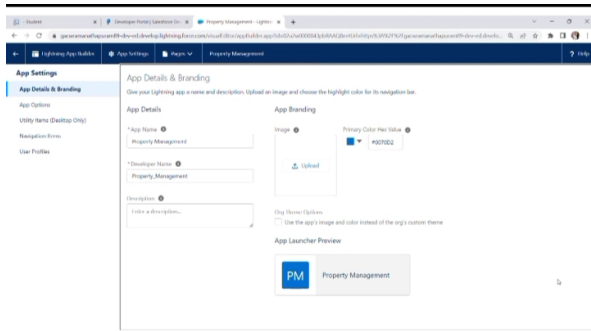Rent, Loan) → Next → (Add User Profile) Add System Administrator, Salesforce

platform user, Standard User → Next.

4. To Add Navigation Items:

Select the items from the search bar and move it using the arrow button → Next.

5. To Add User Profiles:

Search profiles in search bar → click on the arrow button → save & finish.

MILE STONE 5:

 For Object Buy

1. Create Field for Buy

2. Create Property Type: (Picklist) (Residential, Commercial, Industrial)

3. Discount:(Percentage As the Field Data Type)

4. State:Create the Picklist Field (Maharashtra, Gujarat, Rajasthan)(Field Dependency)

5. City:(Take Any City for Field Dependency)

6. Annual Amount To Be Paid

Create Field for Rent

1. Rent:(Auto Number while Creating the object)→ R-{0000}

2. Rental City:Select the Text as the Field Data Name(Any City)

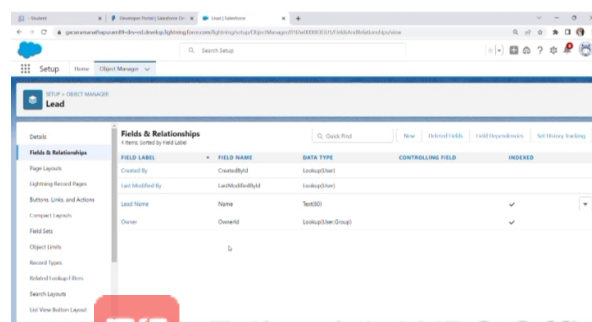3. BHK type:(Picklist) (1BHK, 2BHK,3BHK)

Create Field for Loan

1. Loan Id: Auto generated Field Take it as Autonumber LN-{0000}

2. Interest Rate: (Select the Field Data Type As Currency)

3. Term:(Select the Field Data type as Number)

4. Annual Loan Field create the Number as the field data type

5. Total Loan Instalments:(Field create the Number as the field data type)

6. Loan Repayment(Field create the Number as the field data type)

7. Loan Amoun(Select the Field data type as Formula)

8. For the Loan Object→ Go to the fields and Relationship and select the formula in

field data type. In Formula option select Advanced Formula and write the following

formula

(Loan_Repayment__c * (((1+(Interest_rate__c /52))^ Term__c) -1))/((

Interest_rate__c /52)*((1+(Interest_rate__c /52))^ Term__c))

MILESTONE 6:

Create Marketing

1. Then In The Profile Level Give Read and Create Access to Marketing Executive and

Read, Create, Edit, Delete for the Marketing manager

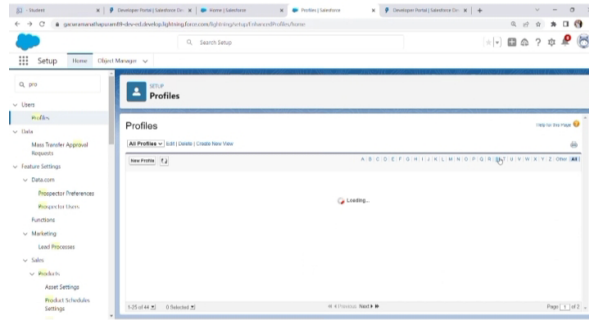2. Marketing Manager Should Have Access to Marketing Executive

Activity3-Sales:

1. In the Profile Level Sales Manager is Having Create, Edit, Delete

2. For Sales Rep1 → Read, Create, Edit

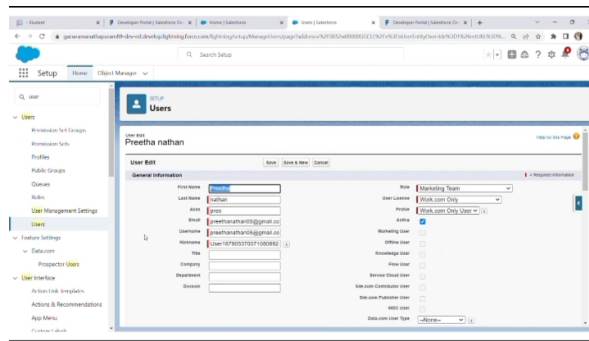3. For Sales Rep2 → Read, Create, Edit

4. For Sales Rep3 → Read only

MIKE STONE 7:

Create User

1. Go to setup → type users in quick find box → select users → click New user.

2. Fill in the fields (first name, last name, alias, email id, username, nick name, role, user
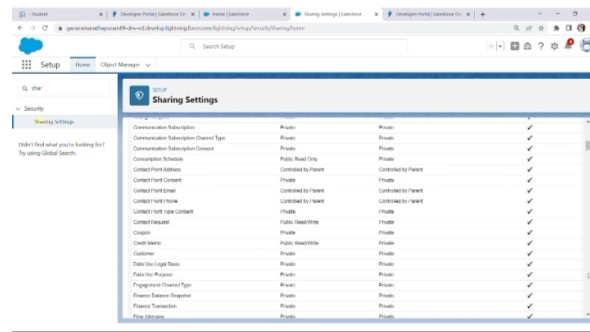
license, profiles) → save

MILE STONE 8:

Create the Permission Sets

1. Go to setup → type "permission sets" in quick search → select permission sets → New.

2. Enter the label name → save.

3. After saving the permission click on the Manage assignment

4. Now click on the Add Assignment

5. Now select the users and click on save

6. Go to permission set and add the access For Sales Rep3 give Access with Create

permission for the User

MILE STONE 9:

Create OWD Setting

1. Setup, use the Quick Find box to find Sharing Settings.

2. Click Edit in the Organization-Wide Defaults area.

3. For each object, select the default access you want to give everyone.

4. To disable automatic access using your hierarchies, deselect Grant Access Using

Hierarchies for Lead, Rent custom object

5. Click Edit and from the Drop Down select private for internal and external

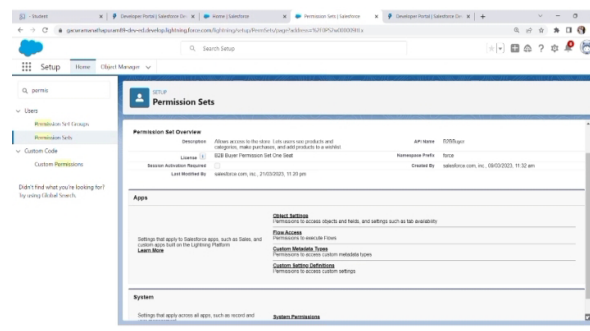6. This Setting is for all the User Which have been Created

Marketing

1. Create the Record Level OWD Setting give it As A Private To Marketing manager And

Marketing Executive

Sales:

1. Sale Manager OWD is Set As Private similarly sales Rep1, Sales Rep2 same OWD for them.

MILE STONE 10:

Create Report-

1. Go to the app → click on the reports tabCreate Report-

2. Click New Report

3. Select report type from category or from report type panel or from search panel → click

on start report.

4. Customize your report, then save or run it.

Create Report for following Condition
Activity:

1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the

Property

2. The Condition should be Like Loan Amount >= to 5000$

Milestone11-Dashboards

Dashboards help you visually understand changing business conditions so 4. Customize your report, then save or run it.
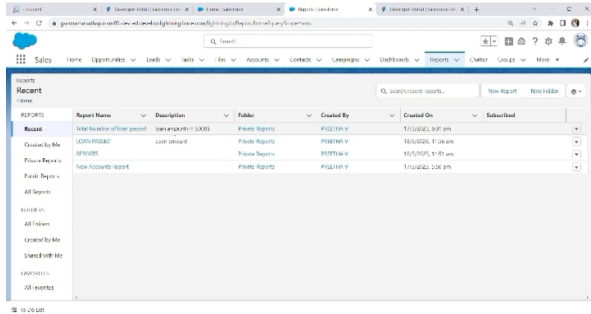
Create Report for following Condition

1. Create the Report of the Total Number of Loan Passed for for getting the Amount For the

Property
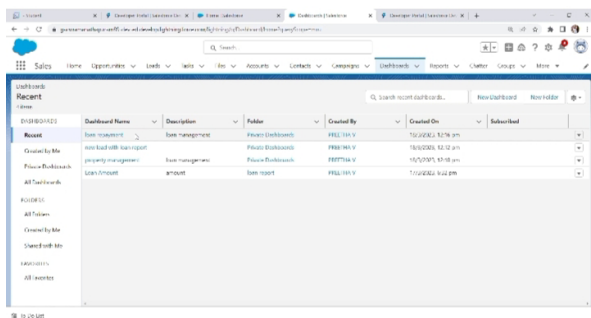
2. The Condition should be Like Loan Amount >= to 5000$

MILE STONE 11:

Dashboards

Create dashboards

1. Go to the App Launcher and select the Dashboards

2. Select add component

3. Select the folder select the following option new lead with loan Amount

4. Select in which format you want display chart

4   TrailheadProfilePublicURL

Team Lead -
https://trailblazer.me/id/pnathan18

TeamMember1 -
http://trailblazer.me/id/pransiyakaruppaiah

Team Member 2 -

https://trailblazer.me/id/nigariga2003
TeamMember3 -
https://trailblazer.me/id/naga23

5   **ADVANTAGES&DISADVANTAGE**

ADVANTAGES:

    The number one benefit of using a PMS is saving time.

    Property management systems make it easier for coordinating the functions of the front office, guest management, sales, planning, and reporting.

DISADVANTAGES:

    Time-consuming if you choose the wrong system.

    Might seem expensive for a small business.

6   **APPLICATIONS**

    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.

7   **CONCLUSION**

    Property management application using sales force is one of the fast growing fields in now a days.

    Here i am developing the App for the Property Management where Buyer can order his Requirements and get the Appropriate Details of the Property

8   **FUTURESCOPE**

    Salesforce has many applications in the real estate industry. And all of it ensures – better communication with clients,

improved customer relationships, and increased sales. So there is a lot of future scope in property management application especially using sales force.