PROJECT REPORT

PROPERTY MANAGEMENT APPLICATION

1. INTRODUCTION

1.1 OVERVIEW

A property management application built on Salesforce is a comprehensive solution that streamlines and automates all aspects of property management. This cloud-based application allows property managers to manage their portfolios of properties, including leasing and maintenance activities, from a single platform.

The application also offers tenant management functionality, enabling property manager to efficiently handle tenant interactions, including rental payments, requests, and complaints.

Salesforce's powerful analytics capabilities provide insightful data for decision-making, while its collaboration features allow for seamless communication between teams. Additionally, the application integrates with other Salesforce products, providing a comprehensive ecosystem for property management.
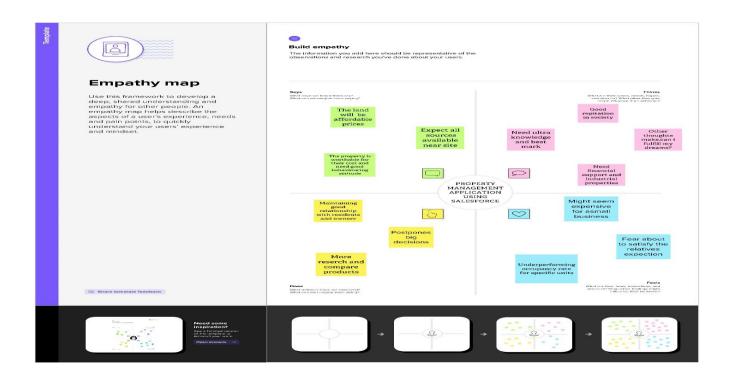
1.2 PURPOSE

The purpose of property management using Salesforce is to provide a comprehensive and efficient solution for managing all aspects of property management, including leasing, maintenance, and tenant management.
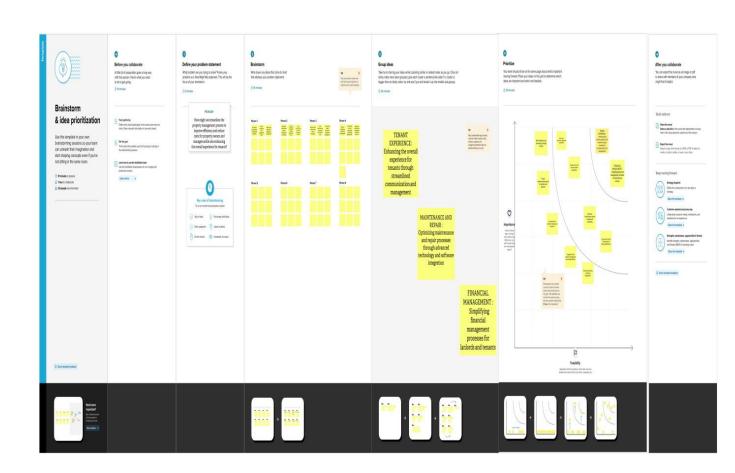
This cloud-based application streamlines operations, improves communication, and provides valuable data insights for decision-making. Ultimately, the goal is to optimize property management operations and enhance the overall tenant experience.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP
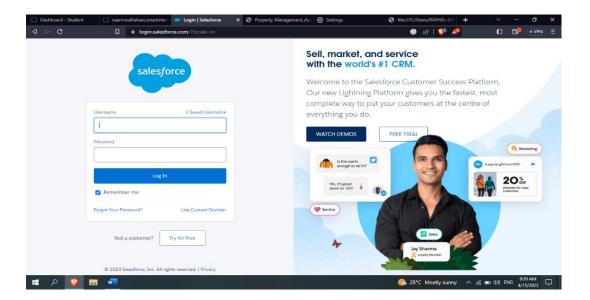
2.2 IDEATION& BRAINSTORMING MAP

3. RESULT

3.1 DATA MODEL

OBJECT NAME	DATA TYPE	
LEAD	**FIELD LABEL**	**DAA TYPE**
	Lead	Autonumber
	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
BUY	**FIELD LABEL**	**DATA TYPE**
	Create Property Type	Picklist
	Discount	Percentage
	State	Picklist
	City	City
RENT	**FIELD LABEL**	**DATA TYPE**
	Rent	Autonumber
	Rental city	Text
	BHK Type	Picklist
LOAN	**FIELD LABEL**	**DATA TYPE**
	Loan	Autonumber
	Interest rate	Currency
	Term	Number
	Annual loan	Number
	Total loan instalment	Number
	Loan repayment	Number
	Loan amount	Formula

3.2 ACTIVITY & SCREENSHOT

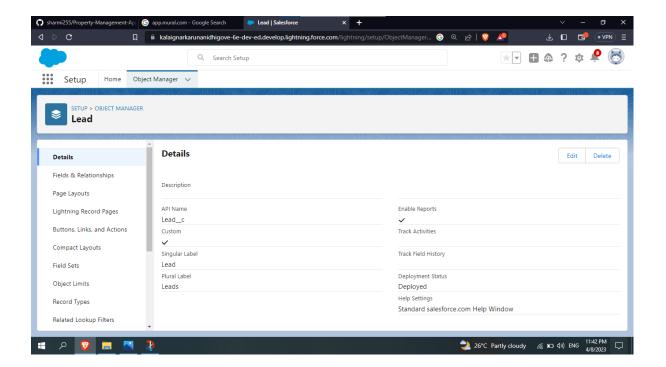### MILESTONE -1: SALESFORCE

➤ Go to developer.salesforce.com and click on sign up. Enter the details such as Name, Email, Role, Company etc.. After a few mins Email is send to your mail id.

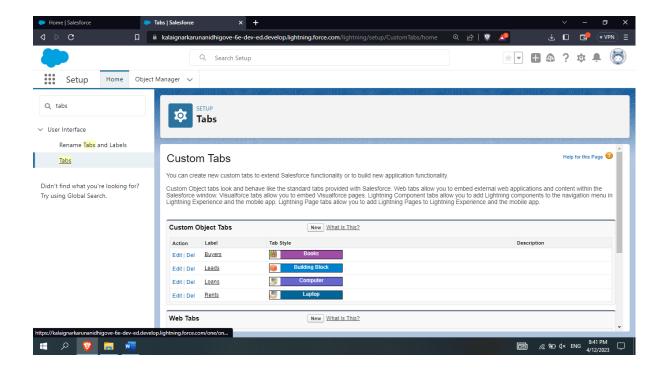➤ By using this to verify account and click it to activate your account.

MILESTONE-2: OBJECT

➢ Navigate to setup to select the object manager. At the top of the right corner side there you can find create custom object.

➢ You will navigate to custom object definition edit where you have to give the object name.

➢ Then enter the label name as lead and plural label as leads, record name data type and save it.

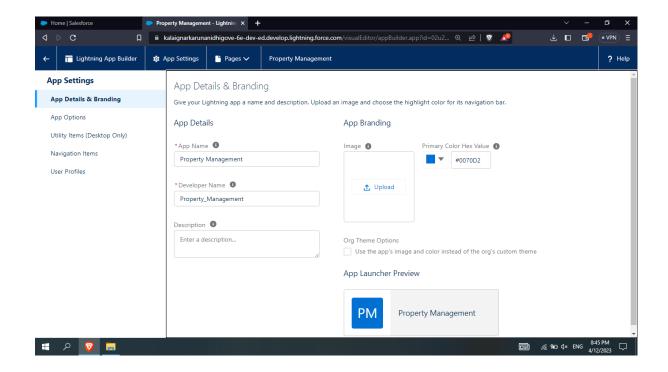➢ Similarly follow this steps to create object for Buy, Rent, Loan respectively.

MILESTONE-3: TABS

➢ Once you created the object then click on next you will navigate to the custom object tab where you have to select tab style for object Lead and click on next.

➢ After the tab selection you will be navigated to add to profiles select default on click on next.

➢ Thereafter you have to select a custom app select include tab so that object will be available in all objects and select save option.

➢ Similarly follow this steps to create tabs for the objects Buy, Rent, Loan.

MILESTONE-4: LIGHTNING APP

➢ Navigate to setup and select app manager by searching app manager in quick find, then click on the new lightning app.

➢ Enter the app name as Property Management then go to the next pages keep it as default.

➢ Add navigation items suc as Lead, Buy, Rent, Loan and thereafter add the system administrator, salesforce platform user then click on next to save and finish.

MILESTONE-5: FIELD

➢ Navigate to setup to click on object manager then type object name in search bar, click on the object.
➢ Then click new in field and relationship, fill label name as Lead and select the given field data type and then click save
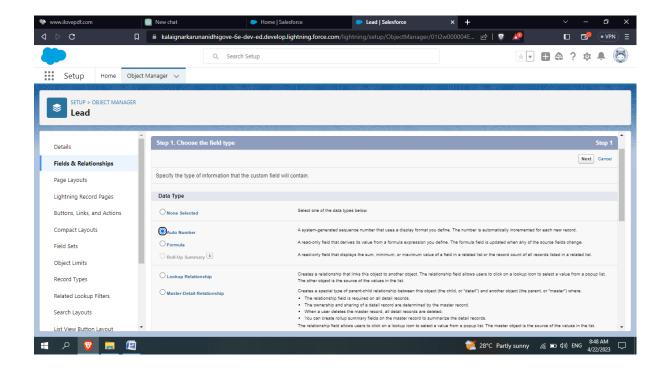
Similaraly,

- For creation of remaining Lead field, fill the label name as Lead, State, City, Email, Phone.
- For creation of Buy field, fill the label name as Create Property Type, Discount, State, City, Annual amount.
- For creation of Rent field, fill the label name as Rent, Rental City, BHK Type.
- For creation of Loan field, fill the label name as Loan Id, Interest Rate, Term, Annual Loan, Total Loan Instalments, Loan Repayment, Loan Amount.

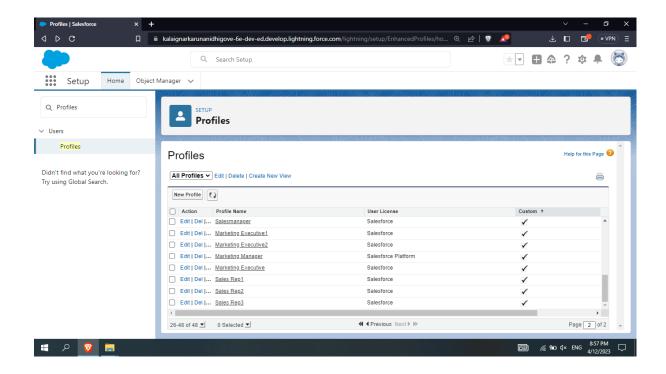Foe Loan object, select formula in the field data type and write the following formula

$(Loan\_Repayment\_\_c*(((1+(Interest\_rate\_\_c/52))^{Term\_\_c}-1))/((Interest\_rate\_\_c/52)*((1+(Interest\_rate\_\_c/52))^{Term\_\_c}))$

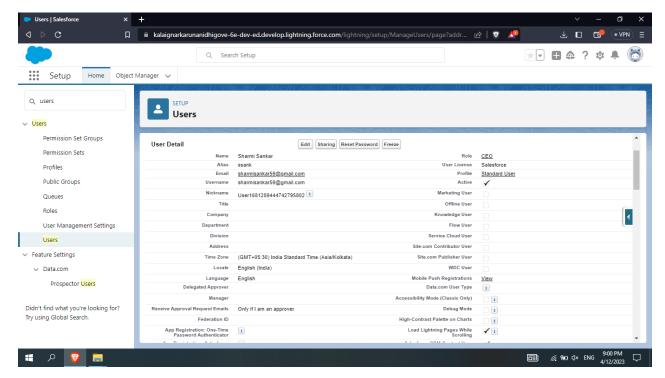Then check the syntax below whether the formula is correct or not.

MILESTONE-6: PROFILE

➢ Navigate to setup to click on profiles by searching it on the quick find box and enter the profile name as Standard User and then save.

➢ Thereafter created the profile Sales Manager, enter profile name as Standard User Profile. Create the profile Marketing Executive1, Marketing Executive2 and Marketing Manager by entering the profile name as Standard Platform User.

➢ Then give Read and Create Access to Marketing Executive and give Read, Create, Edit, Delete Access to Marketing Manager.

➢ Give Create, Edit, Delete Access to Sales Manager and create profile for
- Sales Rep1 and give Access to Read, Create, Edit.
- Sales Rep2 and give Access to Read, Create, Edit.
- Sales Rep3 and give Access to Read Only.

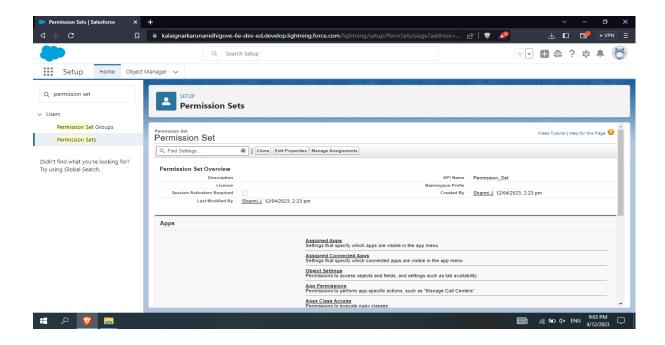## MILESTONE-7: NEW USER

➢ Navigate to setup to select usersby searching it on the quick find box, click New user.

➢ Fill the fields such as (first name, last name, alias, email id, username, nick name, role, user license, profiles) and then save.

MILESTONE-8: PERMISSION SET

➢ Navigate to setup to select permission sets by searching it on the quick find box ,select new and enter the label and then save.

➢ After saving the permission click on the manage assignment, select add assignment and select the users and then save.

MILESTONE-9: SETUP FOR OWD

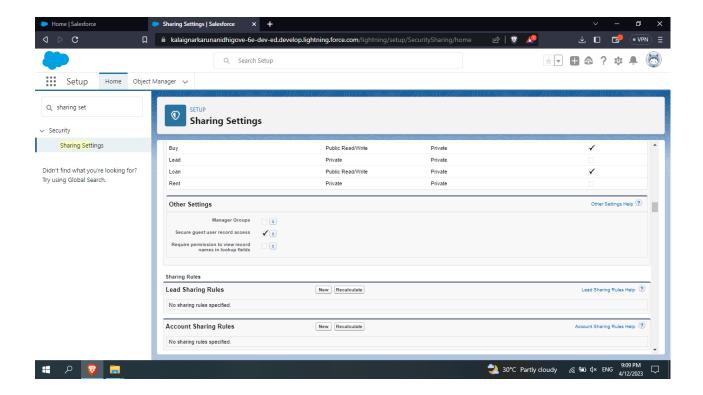➢ Navigate to setup to select sharing settings ,click edit in the organization – wide defaults area.

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

➢ To disable automatic access using your hierarchies,deselect Grant Access Using Hierarchies for Lead, Rent custom object.

➢ And then click edit option and from the Drop Down to select private for internal and external.

➢ Thereafter this setting is for all the user which have created.

Marketing :

• Create the record level OWD setting give it as a private to Marketing Manager and Marketing Executive.
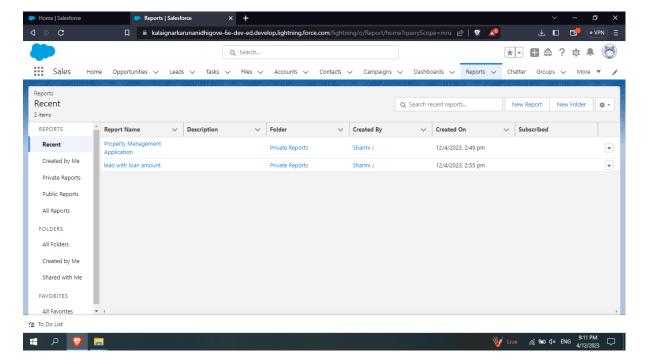
Sales :

• The Sale Manager OWD is set as private similarly Sales Rep1, Sales Rep2 same OWD for them.

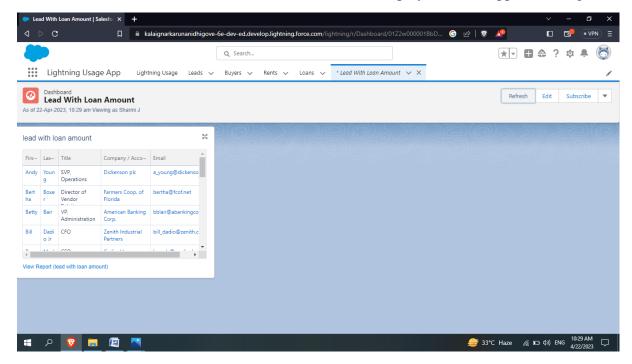## MILESTONE-10: REPORT

> ➢ Go to the app to select on reports tab, click New Report and select the report type from category or from report type panel or from search panel.
> ➢ Then click on start report and customize the report, then save or run it.

MILESTONE-11: DASHBOARD

➢ First go to the App Launcher to select Dashboards and select add component.
➢ Select the folder and click the option Lead With Loan Amount.
➢ Then select the format of chart and display it on the App Home Page.

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead - https://trailblazer.me/id/schandramohan13

Team Member 1 - https://trailblazer.me/id/sharj39

Team Member 2 - https://trailblazer.me/id/skugan1

Team Member 3 - https://trailblazer.me/id/vpandiselvis

5. ADVANTAGES & DISADVANTAGES

Advantages:

➢ **Improved Efficiency**: A property management solution can automate many of the tasks involved in managing properties, making the process faster and more efficient.

➢ **Better Communication**: Property management solutions often include communication tools that make it easier for property owners, tenants, and managers to stay in touch and share information.

- ➢ **Enhanced Customer Service**: A good property management solution can provide better customer service by addressing tenant issues quickly and efficiently.

- ➢ **Increased Profitability:** A property management solution can help property owners increase their profits by reducing costs and maximizing rental income.

- ➢ **Access to Data:** Property management solutions can provide valuable data on property performance, tenant behavior, and market trends, which can help owners make informed decisions.

Disadvantages:

- ➢ **Cost:** Implementing a property management solution can be expensive, especially for smaller property owners.

- ➢ **Learning Curve:** Some property owners and managers may find it challenging to learn and adapt to new property management software, which can create a learning curve and slow down operations.

- ➢ **Technical Issues:** Property management software can sometimes encounter technical issues, which can lead to downtime and frustration for users.

- ➢ **Data Security**: A property management solution may require sensitive data to be stored in the cloud, which can raise concerns about data security and privacy.

- ➢ **Dependency on Technology**: Relying on technology to manage properties can make property owners and managers more vulnerable to technical issues and outages.

6. APPLICATIONS

- ❖ Property management is a broad field that can be applied in many areas. The field is diverse and encompasses a wide range of property types and management responsibilities.
- ❖ Efficient management of rental properties, including tenant information, lease agreements, and rent collection.
- ❖ Streamlined maintenance requests and tracking, ensuring timely resolution of issues.
- ❖ Automated financial reporting and budget tracking, providing real-time insights into property performance.
- ❖ Simplified communication with property owners and tenants, facilitating prompt response to inquiries and concerns.
- ❖ Comprehensive tracking of property-related documents, such as insurance policies and inspection reports.

7.CONCLUSION

Property management application using Salesforce can greatly improve the efficiency and effectiveness of managing rental properties. It streamlines tasks such as rent collection, maintenance requests, financial reporting, and communication with tenants and property owners, allowing for more time to focus on growing the business.

8.FUTURE SCOPE

The future scope of property management is vast, and advancements can be made in several areas to improve efficiency, enhance customer experience, and streamline operations.

- ❖ Increased use of artificial intelligence and machine learning to automate repetitive tasks, such as lease renewals and rent collection.
- ❖ Integration with smart home technologies, allowing for remote control and monitoring of properties.
- ❖ Enhanced data analytics capabilities to provide deeper insights into property performance and trends.
- ❖ Greater customization options to meet the specific needs of different types of properties and property managers.
- ❖ Integration with blockchain technology for secure and transparent record-keeping of property transactions and ownership