PORPERTY MANAGEMENT USING SALESFORCE

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INTRODUCTION

Property management can be a complex process that involves various tasks such as tenant screening, rent collection, maintenance, and more. Salesforce, a popular customer relationship management (CRM) software, offers several applications to streamline these processes.

One of the key advantages of using Salesforce for property management is its ability to centralize data and automate workflows. This allows property managers to save time, reduce errors, and improve overall efficiency.
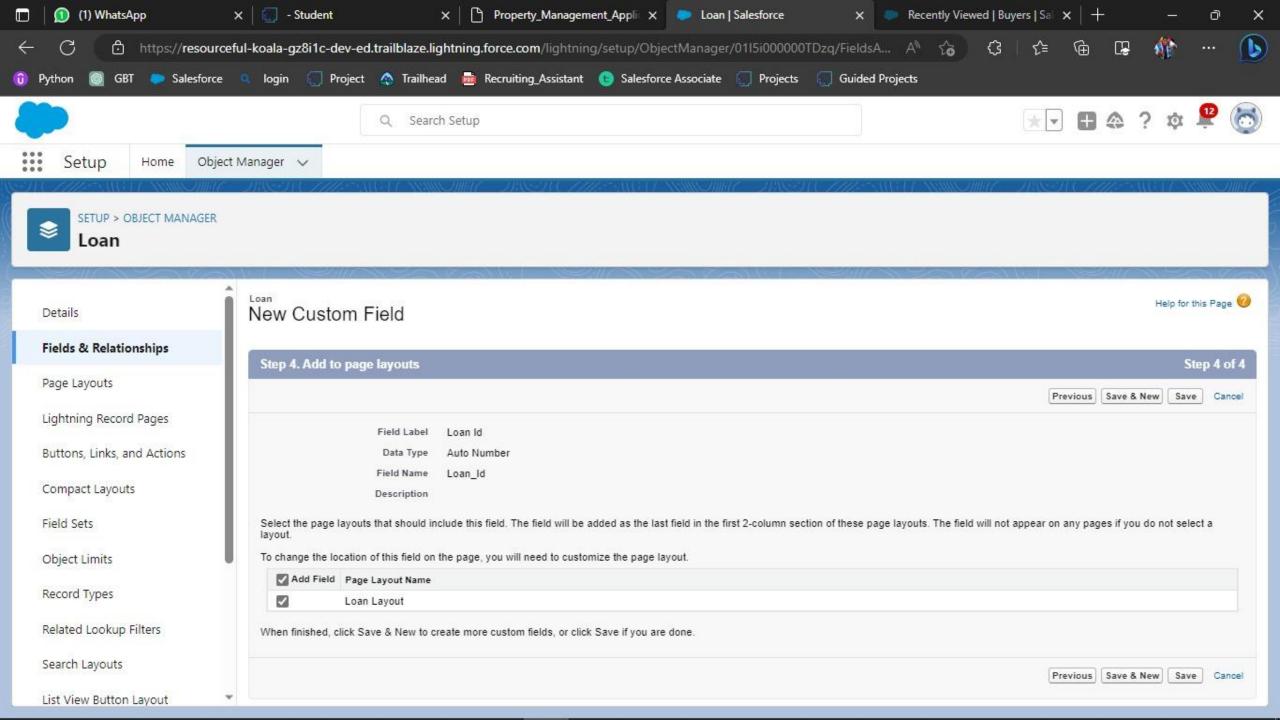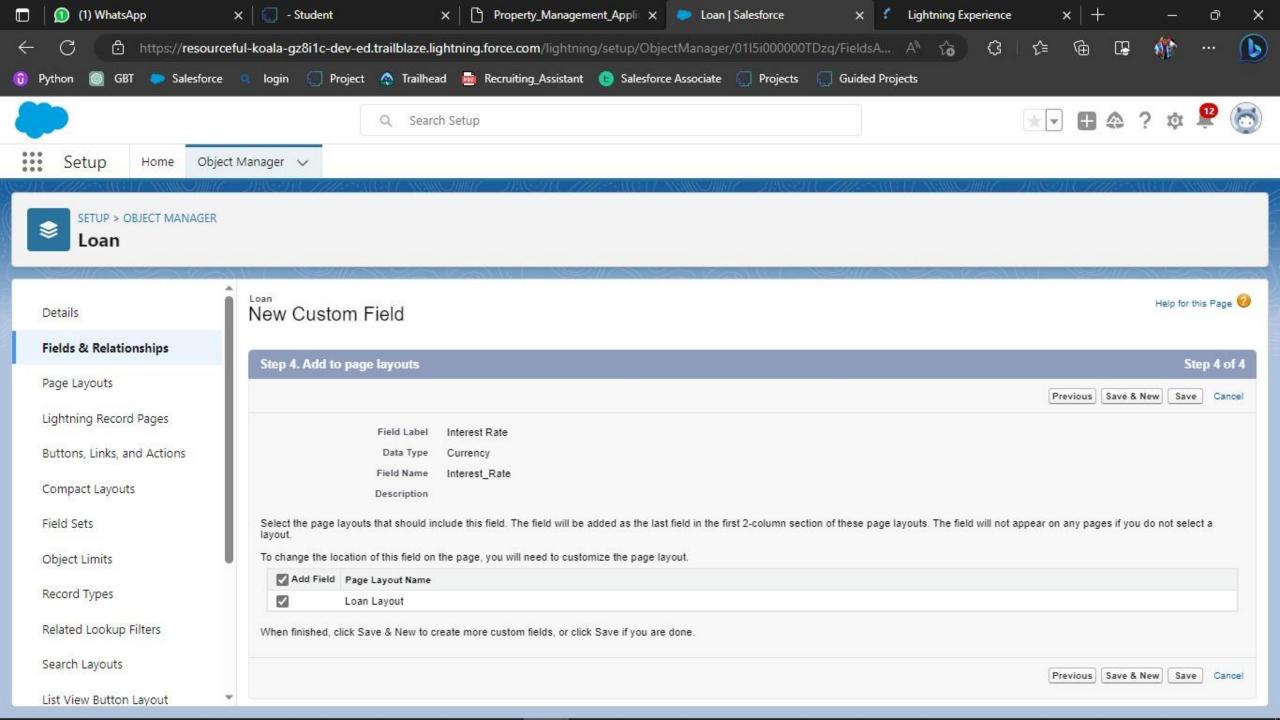
Team Lead-

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https://trailblazer.me/id/shivr87

https://trailblazer.me/id/oqtuf7oj

https://trailblazer.me/id/rohis21

Loan

Loan
New Custom Field

Step 4. Add to page layouts

Step 4 of 4

Previous   Save & New   Save   Cancel

Field Label	Loan Id
Data Type	Auto Number
Field Name	Loan_Id
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☑ Add Field	Page Layout Name
☑	Loan Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous   Save & New   Save   Cancel

Sidebar menu
- Details
- **Fields & Relationships**
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
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Loan
New Custom Field

Step 4. Add to page layouts

Step 4 of 4

Previous   Save & New   Save   Cancel

Field Label	Interest Rate
Data Type	Currency
Field Name	Interest_Rate
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

✓ Add Field	Page Layout Name
✓	Loan Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

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Search Setup

Setup   Home   Object Manager ∨

SETUP > OBJECT MANAGER
Loan

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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List View Button Layout

Loan
New Custom Field

Help for this Page

Step 4. Add to page layouts   Step 4 of 4

Previous Save & New Save Cancel

Field Label   Term
Data Type   Number
Field Name   Term
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☑ Add Field	Page Layout Name
☑	Loan Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Property Managem...   Rents   Buyers   Leads   Reports   Dashboards

Reports
Recent
2 items

Search recent reports...   New Report   New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Buyers Report		Private Reports	RAMANEEDHARAN B	20/4/2023, 12:26 am	
Created by Me	Rent		Private Reports	RAMANEEDHARAN B	20/4/2023, 12:21 am	
Private Reports						
Public Reports						
All Reports						

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

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Python GBT Salesforce login Project Trailhead Recruiting_Assistant Salesforce Associate Projects Guided Projects

Search Setup

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Rent

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Rent
New Custom Field

Help for this Page

Step 3. Establish field-level security | Step 3 of 4

Previous | Next | Cancel

Field Label BHK type
Data Type Picklist
Field Name BHK_type
Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	☑	☐
Analytics Cloud Security User	☑	☐
Contract Manager	☑	☐
Cross Org Data Proxy User	☑	☐
Custom: Marketing Profile	☑	☐

Applications

Salesforce offers several applications that can be used for property management, including Sales Cloud, Service Cloud, and Community Cloud. Sales Cloud can be used to manage leads, track sales, and analyze performance. Service Cloud can be used to handle tenant requests, maintenance issues, and other service-related tasks. Community Cloud can be used to create online portals for tenants, owners, and other stakeholders.

In addition to these core applications, Salesforce also offers a range of third-party integrations and add-ons that can further enhance property management capabilities. For example, integrations with accounting software can help automate rent collection and financial reporting.

Advantages

Using Salesforce for property management offers several advantages over traditional methods. One of the biggest advantages is the ability to centralize data and automate workflows. This can help property managers save time, reduce errors, and improve overall efficiency.

Another advantage of using Salesforce for property management is the ability to access real-time data and analytics. This can help property managers make informed decisions about things like pricing, marketing, and maintenance. Additionally, Salesforce's mobile capabilities allow property managers to stay connected and manage their properties on-the-go.

Disadvantages

While there are many advantages to using Salesforce for property management, there are also some potential disadvantages to consider. One of the main disadvantages is the cost. Salesforce can be expensive, especially for small property management companies or individual landlords.

Another potential disadvantage is the learning curve. Salesforce can be complex and may require significant training and support to use effectively. Additionally, some property managers may prefer more traditional methods of managing their properties and may not see the value in using Salesforce.

Future Scope

As technology continues to evolve, the future of property management is likely to become even more automated and data-driven. Salesforce is well-positioned to play a key role in this future, with its advanced analytics, artificial intelligence, and machine learning capabilities. Additionally, Salesforce's ecosystem of third-party apps and integrations is constantly growing, providing property managers with even more tools and resources to manage their properties. Overall, the future looks bright for property management with Salesforce at the forefront of innovation.

Conclusion

In conclusion, Salesforce offers a powerful set of tools and applications for property management. While there are some potential disadvantages to consider, the advantages of using Salesforce for property management far outweigh the costs. With its ability to centralize data, automate workflows, and provide real-time analytics, Salesforce is well-suited to meet the needs of property managers both now and in the future.

Whether you're a small property management company or a large real estate firm, Salesforce has something to offer. By leveraging the power of Salesforce, property managers can save time, reduce errors, and improve overall efficiency, ultimately leading to better tenant satisfaction and increased profitability.