

**H.H THE RAJAH'S COLLEGE
PUDUKKOTTAI – 622 001**

DEPARTMENT OF MATHEMATICS

NAAN MUDHALVAN – SMART BRIDGE PROJECT

PROJECT TITLE

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

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INTRODUCTION

Develop an App for the Property Management where buyer can order his requirements and get the appropriate details of the property. According to his interest just provide him with some discounts upto what extent he can get the discount . Also track wheather he is interested in taking the loan available for so just calculate how much loan amount user can get it. provide the security for two different profiles like for marketing and sales team. the finally create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal.

1.1 OVERVIEW

Salesforce is a powerful customer relationship management (CRM) platform that can be used for a variety of business applications, including property management. A property management application using Salesforce can help property managers automate and streamline their workflows, improve communication with tenants and owners, and gain real-time insights into their properties.

Here are some of the features that can be included in a property management application using Salesforce:

Property and Tenant Management: The application can be used to store and manage information about properties, tenants, and leases. Property managers can easily access tenant information, rent payment history, maintenance requests, and more.

Maintenance Management: The application can help property managers streamline maintenance requests and track maintenance work orders. Property managers can assign tasks to maintenance staff, track progress, and receive notifications when work orders are complete.

Communication and Collaboration: Salesforce provides various tools that can be used for communication and collaboration, such as Chatter. Property managers can use Chatter to communicate with tenants, owners, and staff in real-time, share documents and files, and keep everyone informed about important updates.

Financial Management: The application can be used to manage rent payments, security deposits, and other financial transactions related to properties. Property managers can also generate reports to track financial performance and identify areas for improvement.

Analytics and Reporting: Salesforce provides powerful analytics and reporting tools that can be used to gain real-time insights into property performance. Property managers can analyze data to identify trends, track key performance indicators (KPIs), and make data-driven decisions to improve property performance.

Overall, a property management application using Salesforce can help property managers improve efficiency, streamline workflows, and provide better service to tenants and owners."

1.2 PURPOSE

"The purpose of a property management application using Salesforce is to help property managers automate and streamline their workflows, improve communication with tenants and owners, and gain real-time insights into their properties.

The application can help property managers manage properties, tenants, and leases more effectively. They can easily access tenant information, rent payment history, maintenance requests, and more. Property managers can also streamline maintenance requests, assign tasks to maintenance staff, track progress, and receive notifications when work orders are complete. This can help them to manage maintenance more efficiently, reduce downtime, and ensure that properties are well-maintained.

Communication and collaboration are also important aspects of property management. Salesforce provides various tools that can be used for communication and collaboration, such as Chatter. Property managers can use Chatter to communicate with tenants, owners, and staff in real-time, share documents and files, and keep everyone informed about important updates. This can help property managers to provide better service to tenants and owners, and ensure that everyone is on the same page.

Financial management is also a key aspect of property management. The application can be used to manage rent payments, security deposits, and other financial transactions related to properties. Property managers can also generate reports to track financial performance and identify areas for improvement. This can

help property managers to make data-driven decisions to improve property performance and maximize profits.

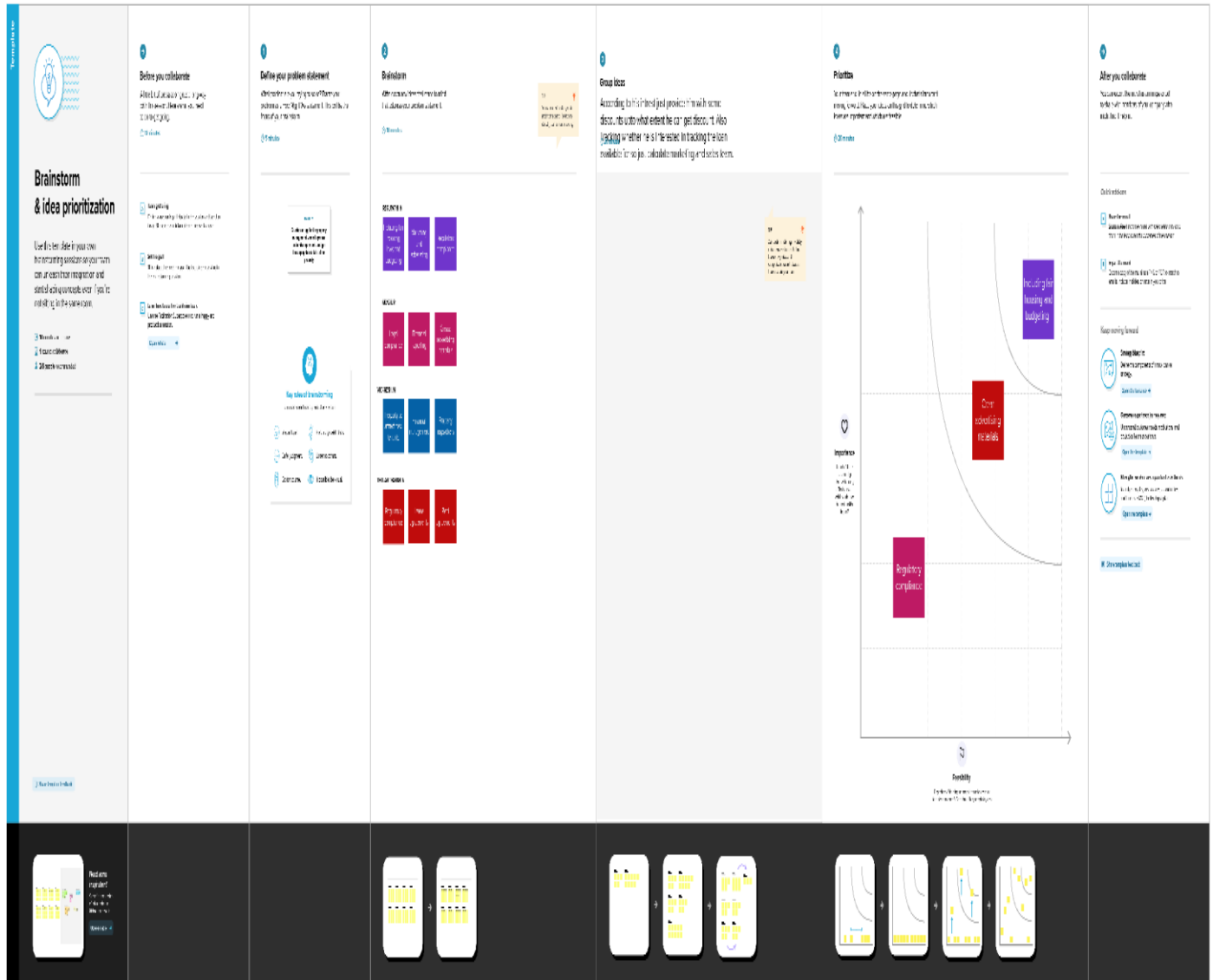
Finally, analytics and reporting are essential for property managers to gain real-time insights into property performance. Salesforce provides powerful analytics and reporting tools that can be used to identify trends, track KPIs, and make data-driven decisions to improve property performance. This can help property managers to optimize their properties, reduce costs, and increase revenue.

Overall, the purpose of a property management application using Salesforce is to help property managers improve efficiency, streamline workflows, and provide better service to tenants and owners, while also gaining real-time insights into property performance to make data-driven decisions that improve profitability.

2.1 EMPATHY MAP :



2.2 IDEATION & BRAIN STORMING MAP :



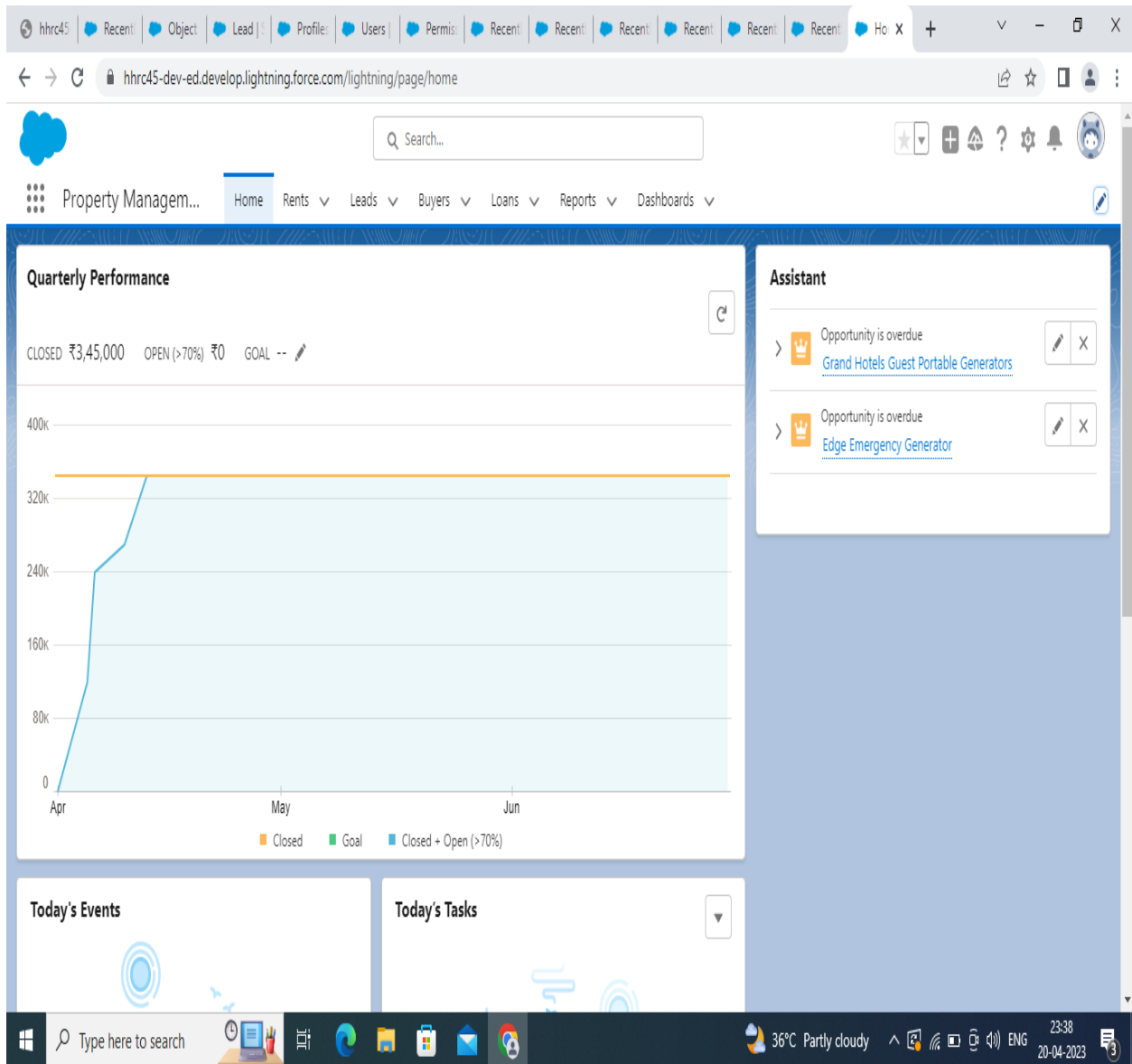
3. RESULT :

DATA MODEL :

Object Name	Fields in the object	
Object 1: Buy		
	Field Label	Data Type
	Buy Name	Text
	Email	Email
	Discount	Number
	Phone	Number
	State	Text
	City	Text
Object 2: Rent		
	Field Label	Data Type
	Rent Name	Text
	Phone	Number
	City	City
Object 3: Loan		
	Field Label	Data Type
	Loan Name	Text
	Phone	Number

3.2 Activity & Screenshot

Over all App view :

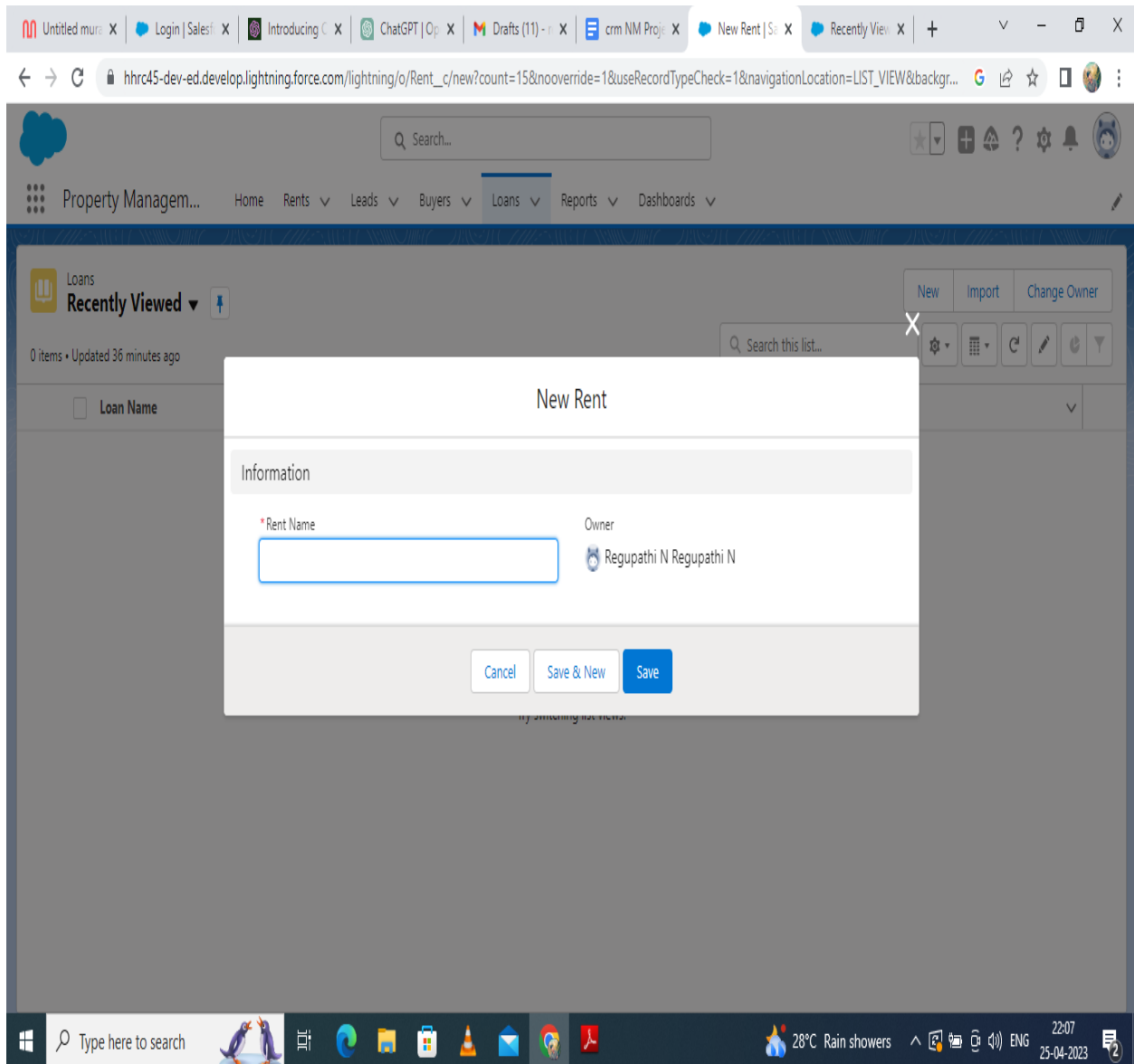


Object 1 : Buy

The screenshot shows a web browser window with multiple tabs. The active tab is titled "New Buy | Sales". The URL in the address bar is "hhrc45-dev-ed.develop.lightning.force.com/lightning/o/Buy_c/new?count=14&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&backgro...". The page displays a "Property Managem..." sidebar on the left with a "Loans Recently Viewed" section. The main content area is a "New Buy" form. The form has a title bar "New Buy" and a tab "Information". The form fields are: "Buy Name" (a text input field with a red border and a red error message "Complete this field."), "Owner" (a dropdown menu showing "Regupathi N Regupathi N"), "Student" (a text input field), "Buy" (a dropdown menu showing "--None--"), "Rent" (a text input field), "Loan" (a text input field), and "Lead" (a text input field). At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save". The Windows taskbar at the bottom shows the system clock as 22:01 on 25-04-2023.

The screenshot shows the same web browser window as the previous one, but the "New Buy" form is now displaying the "Loan" section. The form fields are: "Loan" (a text input field), "Lead" (a text input field), "State" (a dropdown menu showing "--None--" with a link "View all dependencies" below it), "City" (a dropdown menu showing "--None--" with a link "View all dependencies" below it), "Email" (a text input field), and "Phone" (a text input field). At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save". The Windows taskbar at the bottom shows the system clock as 22:01 on 25-04-2023.

Object 2 : Rent



Object 3 : Loan

The screenshot displays a Salesforce Lightning interface with a browser window at the top. The browser tabs include 'Untitled mur...', 'Login | Salesf...', 'Introducing C...', 'ChatGPT | Op...', 'Drafts (11) - r...', 'crm NM Proj...', 'New Loan | S...', and 'Recently View...'. The address bar shows the URL: `hhrc45-dev-ed.develop.lightning.force.com/lightning/o/Loan_c/new?count=16&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&backgr...`.

The Salesforce interface has a top navigation bar with a search bar and icons for home, settings, and notifications. Below this is a sidebar menu with options: 'Property Managem...', 'Home', 'Rents', 'Leads', 'Buyers', 'Loans', 'Reports', and 'Dashboards'. The 'Loans' tab is selected.

The main content area shows the 'Loans' section with a 'Recently Viewed' filter. A modal window titled 'New Loan' is open, displaying the 'Information' section. The form includes a required field for 'Loan Name' (marked with an asterisk) and a field for 'Owner' which is populated with 'Regupathi N Regupathi N'. At the bottom of the modal are three buttons: 'Cancel', 'Save & New', and 'Save'.

The Windows taskbar at the bottom shows the search bar, task view icon, and several application icons. The system tray on the right indicates a temperature of 28°C, rain showers, and the date/time: 22:08 on 25-04-2023.

4 Trailhead Profile Public URL

Team Lead ; <https://trailblazer.me/id/reguhhrc2402>

Team Member 1 : <https://trailblazer.me/id/vigneshm9>

Team Member 2 : <https://trailblazer.me/id/thasan2002>

Team Member 3 : <https://trailblazer.me/id/akamr35>

5 ADVANTAGE & DISADVANTAGE

Advantages

:"There are several advantages to using a property management application built on Salesforce:

Centralized platform: A property management application built on Salesforce provides a centralized platform for property managers to manage their properties, tenants, and maintenance requests. This eliminates the need for multiple systems and spreadsheets, making it easier for property managers to access and manage their data.

Automation: Salesforce allows for automation of various business processes, which can save property managers time and reduce errors. For example, lease agreements can be automatically generated, and rent payments can be automatically processed.

Customization: Salesforce is highly customizable, which means that a property management application can be tailored to meet the specific needs of a property manager. This can include custom fields, workflows, and dashboards.

Scalability: Salesforce is a cloud-based platform, which means that it can scale to meet the needs of a growing property management business. This allows property managers to add more properties and tenants without having to worry about outgrowing their software.

Analytics and reporting: Salesforce provides robust analytics and reporting capabilities, which can help property managers to make data-driven decisions. This includes tracking occupancy rates, rent collections, and maintenance costs.

Overall, a property management application built on Salesforce can help property managers to improve their efficiency, reduce errors, and make better decisions. It provides a centralized platform that can be tailored to meet the specific needs of a property management business, and it can scale to accommodate growth."

Disadvantages:

While there are several advantages to using a property management application built on Salesforce, there are also some potential disadvantages to consider:

Cost: Salesforce can be an expensive platform, especially for smaller property management businesses. Licensing fees, implementation costs, and ongoing maintenance costs can add up quickly.

Complexity: Salesforce is a complex platform that requires specialized knowledge and skills to implement and maintain. This means that property management businesses may need to invest in training or hire specialized staff to manage the application.

Customization limitations: While Salesforce is highly customizable, there may be some limitations to the level of customization that can be achieved without significant development effort. This could limit a property management business's ability to tailor the application to their specific needs.

Integration challenges: Integrating Salesforce with other systems and applications can be challenging, which could limit a property management business's ability to use the platform effectively.

Data ownership: Salesforce is a cloud-based platform, which means that property management businesses will need to rely on Salesforce to store and manage their data. This can raise concerns about data ownership and security

APPLICATIONS

- ❖ Propertybase: Propertybase is a CRM and marketing platform designed specifically for the real estate industry. It provides features for managing properties, listings, and leads, as well as customizable workflows and reporting.
- ❖ ProLease: ProLease is a lease management platform that can be integrated with Salesforce. It provides features for managing lease agreements, rent payments, and maintenance requests.
- ❖ Real Estate Cloud: Real Estate Cloud is a CRM platform designed for real estate professionals. It provides features for managing properties, listings, and leads, as well as custom workflows and reporting.
- ❖ FieldAware: FieldAware is a field service management platform that can be integrated with Salesforce. It provides features for managing maintenance requests, scheduling repairs, and tracking technician activities.
- ❖ ServiceMax: ServiceMax is a field service management platform designed for managing complex service operations. It provides features for managing maintenance requests, scheduling repairs, and tracking technician activities

CONCLUSION

" In conclusion, a property management application built on Salesforce can provide many benefits to property managers. It can streamline their operations, improve efficiency, and provide valuable insights into their properties and tenants. However, there are also some potential drawbacks to consider, such as the cost of the platform, complexity, customization limitations, integration challenges, and data ownership.

To build a successful property management application on Salesforce, property managers should carefully evaluate their needs and choose the right applications from the Salesforce AppExchange that can provide the features and functionality they require. They should also consider working with a Salesforce implementation partner to ensure a smooth implementation and ongoing support.

Overall, a property management application built on Salesforce can be a powerful tool for property managers to manage their properties and tenants more efficiently and effectively, and it can help them to stay ahead in a competitive market"

FUTURE SCOPE

- ❖ "The future scope of property management applications built on Salesforce is promising. As the real estate industry continues to evolve and become more data-driven, property managers will increasingly rely on technology to manage their properties and tenants. Some potential future developments in this space include:
- ❖ Artificial intelligence and machine learning: As property management applications become more sophisticated, they may incorporate AI and machine learning capabilities to automate tasks, predict maintenance needs, and provide personalized tenant experiences.
- ❖ Internet of Things (IoT) integration: IoT sensors and devices can provide real-time data on energy consumption, temperature, and other environmental factors that can help property managers optimize building performance and reduce costs.
- ❖ Blockchain: Blockchain technology can provide increased security and transparency in lease agreements, property ownership records, and payment processing.
- ❖ Mobile access: Property management applications will increasingly be designed to work on mobile devices, providing property managers and tenants with access to key data and features on the go.
- ❖ Virtual reality and augmented reality: Virtual and augmented reality technologies can provide a more immersive property viewing experience for

prospective tenants and allow property managers to conduct remote inspections.

- ❖ Overall, the future scope of property management applications built on Salesforce is exciting, with potential developments in AI, IoT, blockchain, mobile access, and virtual and augmented reality. As these technologies continue to evolve, property managers can expect to see increased efficiency, better tenant experiences, and improved property performance.