

# PROJECT REPORT

## PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

### 1. INTRODUCTION

#### 1.1 OVERVIEW:

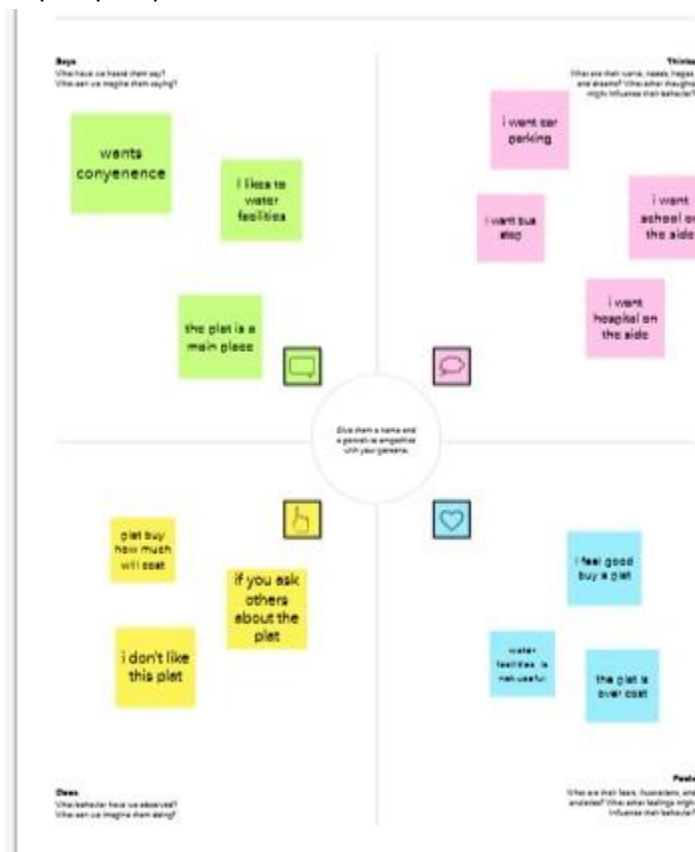
A professional or a business that deal with the day to day responsibility of real estate is called a property manager. Here we will explore the role of a property manager in real estate through online using the property management application using salesforce.

#### 1.2 PURPOSE:

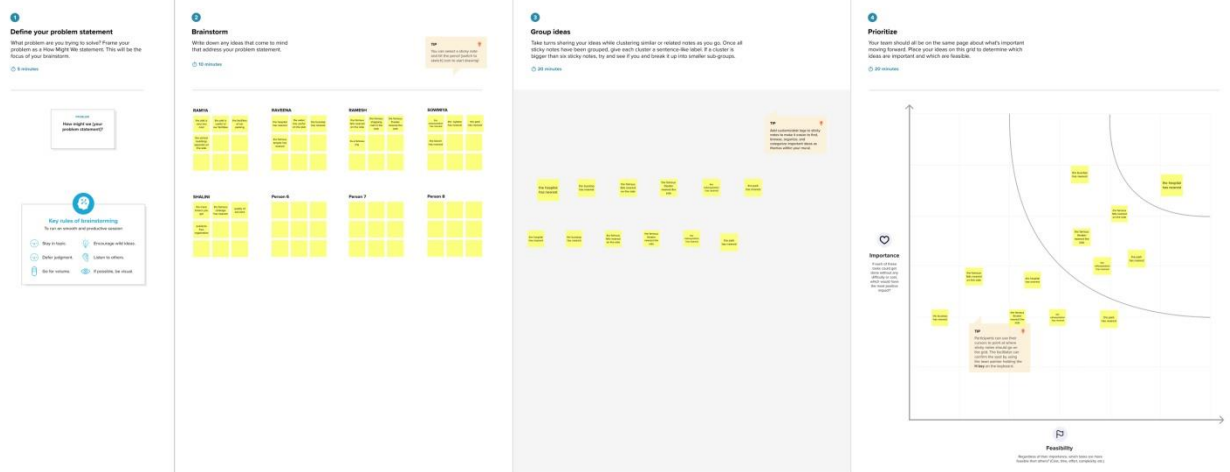
To develop an app for the property management where the buyer can order his requirements and get the appropriate details of the property.

### 2. PROBLEM DEFINITION & DESIGN THINKING:

#### 2.1 Empathy Map:



## 2.2 Ideation & Brainstorming Map :




### 3. RESULT

### 3.1 Data Model:

OBJECT NAME	FIELDS IN THE OBJECT	
Buy	FIELD LABEL	DATA TYPE
	Annual Amount to be Paid	Currency
	Buy	Picklist
	Buy Name	Text
	City	Picklist
	Discount	Percent
	Property Type	Picklist
	State	Picklist
Rent	FIELD LABEL	DATA TYPE
	BHK Type	Picklist
	Rent Name	Text
	Rent	Auto Number
	Rental City	Text

Loan	FIELD LABEL	DATA TYPE
	Annual Loan	Number
	Interest Rate	Currency
	Loan Amount	Formula
	Loan Id	Auto Number
	Loan Name	Text
	Loan Repayment	Number
	Term	Number
	Total Loan Instalment	Number
Customer	FIELD LABEL	DATA TYPE
	City	Picklist
	Customer Name	Text
	Date	Picklist
	Email	Email
	Phone	Phone

## Milestone 1 - Salesforce



### Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*  
Your first name

Last Name\*  
Your last name

Email\*  
Your email address

Role\*  
Your job role

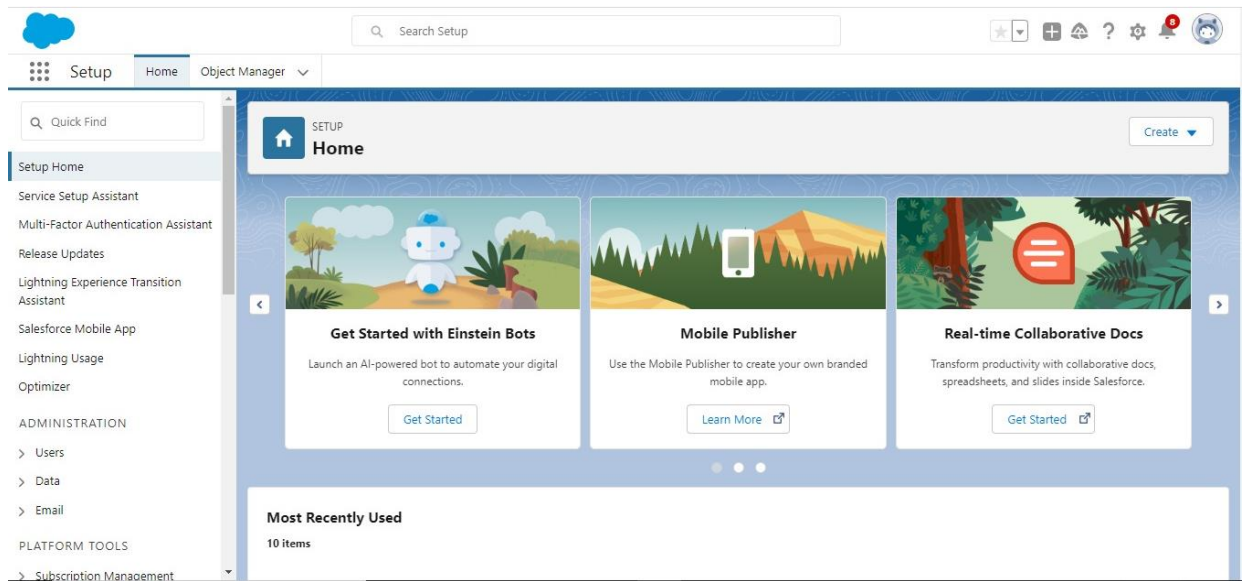
Select your job role

Company\*  
Company Name

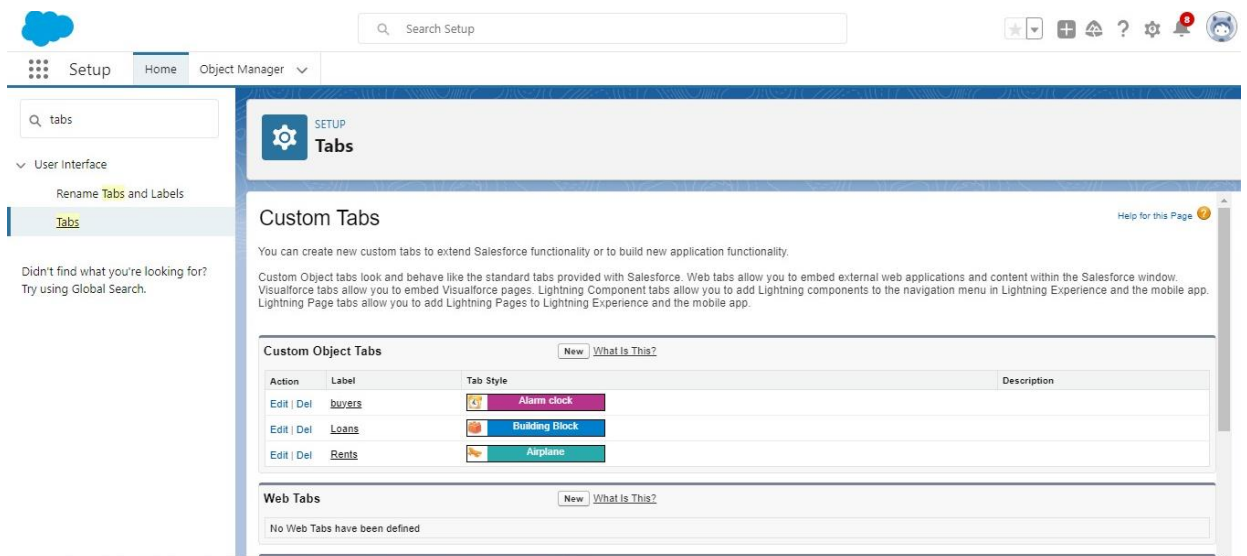
**Build enterprise-quality apps fast to bring your ideas to life**

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

## Milestone 2 - Object



## Milestone 3 – Tab



## Milestone 4 –Lightning App

The screenshot shows the Salesforce Lightning Experience App Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options like 'Setup Home', 'Service Setup Assistant', and 'Release Updates'. The main content area is titled 'Lightning Experience App Manager' and features a 'Clone Apps(Beta)' section with a toggle for 'Enable App Cloning' (currently disabled). Below this is a table listing 22 items, sorted by App Name, filtered by All appmenuitems - TabSet Type. The table has columns for App Name, Developer Name, Description, Last Modified, App..., Vi..., and a dropdown menu.

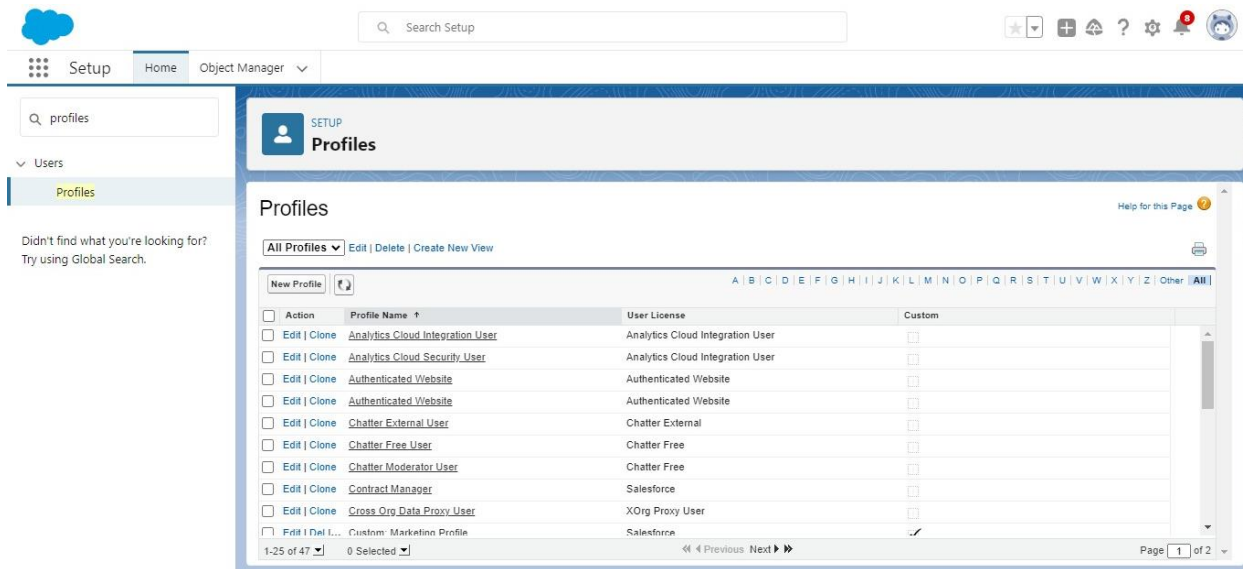
	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...	
1	All Tabs	AllTabSet		29/03/2023, 10:53 am	Classic		
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	29/03/2023, 10:53 am	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	29/03/2023, 10:53 am	Classic	✓	
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your ...	29/03/2023, 10:55 am	Lightning	✓	

## Milestone 5 – Files

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options like 'Setup Home', 'Service Setup Assistant', and 'Release Updates'. The main content area is titled 'Object Manager' and features a 'Quick Find' search bar, a 'Schema Builder' button, and a 'Create' dropdown menu. Below this is a table listing 51+ items, sorted by Label. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			

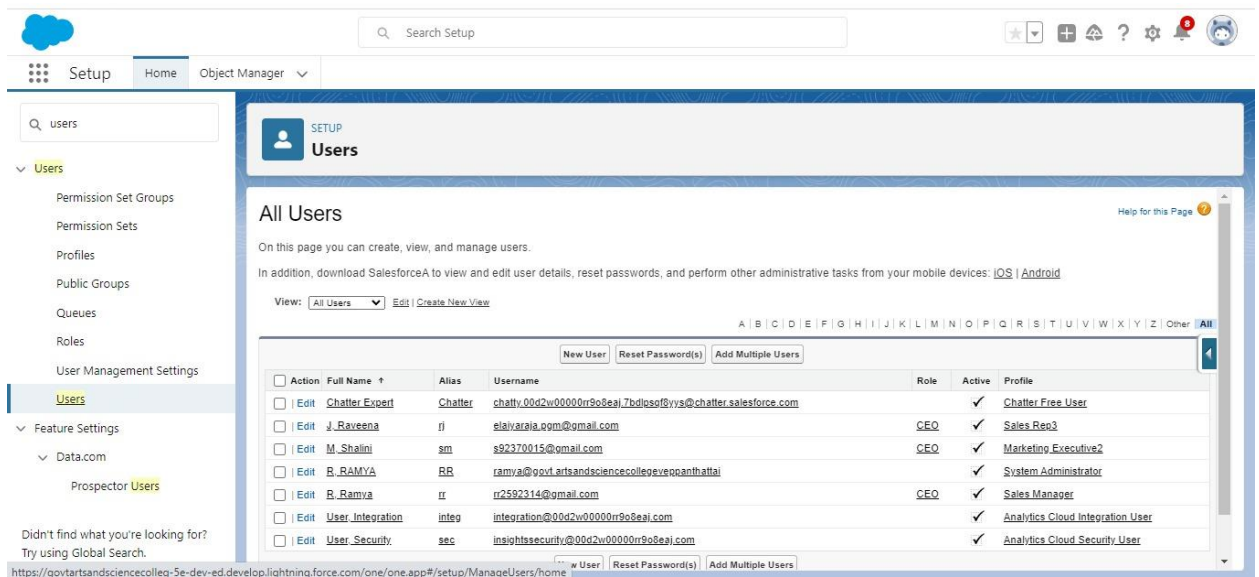
## Milestone 6 – Profile



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar for 'profiles' and a navigation menu with 'Users' and 'Profiles' (selected). The main content area is titled 'Profiles' and includes a 'New Profile' button and a table of existing profiles. The table has columns for Action, Profile Name, User License, and Custom. The profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, and Custom Marketing Profile. The bottom of the table shows '1-25 of 47' and '0 Selected'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

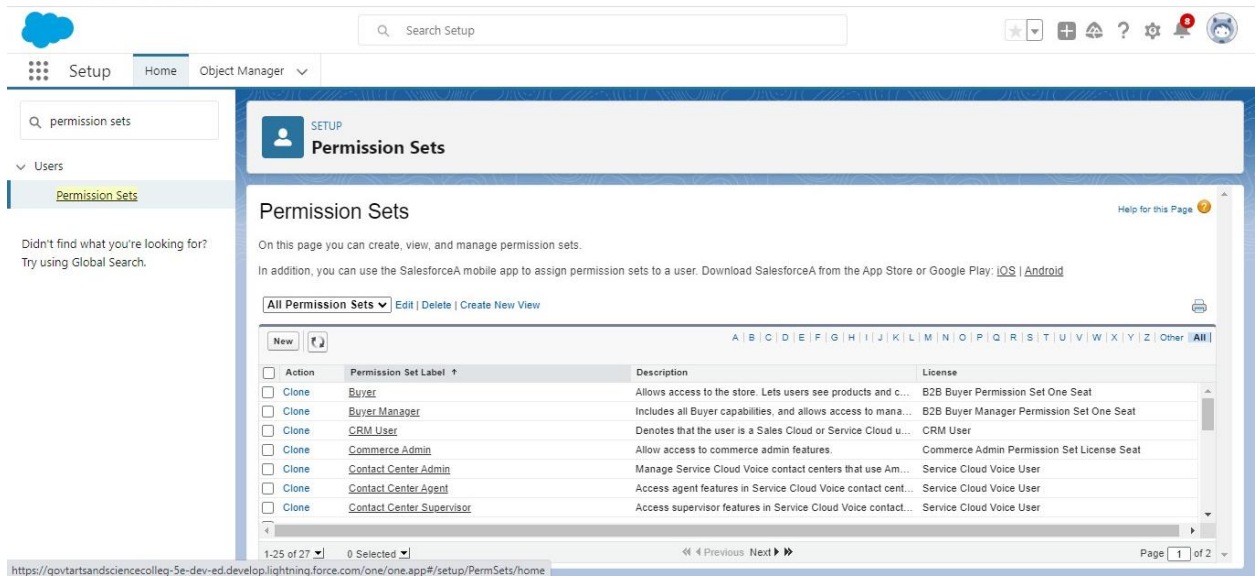
## Milestone 7 – New User



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar for 'users' and a navigation menu with 'Users' (selected) and 'Feature Settings'. The main content area is titled 'All Users' and includes a 'New User' button and a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed include Chatter Expert, J. Raveena, M. Shalini, B. RAMYA, B. Ramya, User Integration, and User Security. The bottom of the table shows '1-25 of 47' and '0 Selected'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d2w00000r908a17bd1qs0f@vya@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	J. Raveena	jr	elaviraha.pgm@gmail.com	CEO	<input checked="" type="checkbox"/>	Sales Rep3
<input type="checkbox"/> Edit	M. Shalini	sm	s92370015@gmail.com	CEO	<input checked="" type="checkbox"/>	Marketing Executive2
<input type="checkbox"/> Edit	B. RAMYA	BR	ramya@govt.artsandsciencecollegepoanhattai		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	B. Ramya	rr	rr2592314@gmail.com	CEO	<input checked="" type="checkbox"/>	Sales Manager
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000r908a17bd1qs0f@vya@chatter.salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2w00000r908a17bd1qs0f@vya@chatter.salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## Milestone 8 –Permission Sets



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar with 'permission sets' and a navigation menu with 'Users' and 'Permission Sets'. The main content area has a 'SETUP' header and a 'Permission Sets' title. Below the title is a description of the page and a list of all permission sets. The list includes columns for Action, Permission Set Label, Description, and License. The list shows several permission sets, including 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', and 'Contact Center Supervisor'. The bottom of the page shows a pagination bar with '1-25 of 27' and '0 Selected'.

Search Setup

Setup Home Object Manager

permission sets

Users

Permission Sets

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

SETUP

### Permission Sets

On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

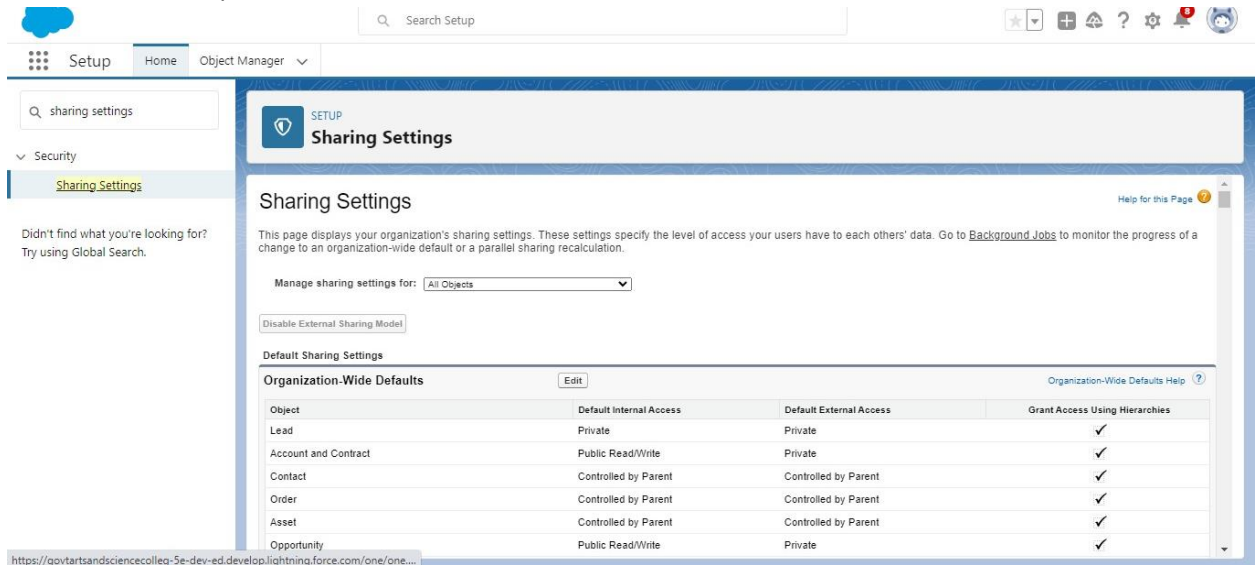
All Permission Sets Edit Delete Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/>	Clone Commerce Admin	Allow access to commerce admin features	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/>	Clone Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/>	Clone Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User

1-25 of 27 0 Selected Previous Next Page 1 of 2

<https://qovtartsandsciencecolleq-5e-dev-ed.develop.lightning.force.com/one/one.app#/setup/PermSets/home>

## Milestone 9 - Setup For Owd



The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' section. The left sidebar contains a search bar with 'sharing settings' and a navigation menu with 'Security' and 'Sharing Settings'. The main content area has a 'SETUP' header and a 'Sharing Settings' title. Below the title is a description of the page and a table of default sharing settings. The table has columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists several objects, including 'Lead', 'Account and Contract', 'Contact', 'Order', 'Asset', and 'Opportunity'.

Search Setup

Setup Home Object Manager

sharing settings

Security

Sharing Settings

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

SETUP

### Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

#### Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	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	✓

<https://qovtartsandsciencecolleq-5e-dev-ed.develop.lightning.force.com/one/one...>



## Milestone 10 – Report

The screenshot shows the Salesforce Reports interface. The top navigation bar includes a search bar and various utility icons. The main navigation menu has tabs for 'property managem...', 'Leads', 'buyers', 'Rents', 'Loans', 'Customers', 'Reports', and 'Dashboards'. The 'Reports' tab is selected, displaying a report titled 'Report: buyers' and 'New buyers Report'. The report shows 'Total Records' as 3. Below this is a table with columns for 'Property Type', 'Discount', and 'Total'. The table data is as follows:

Property Type	Discount	Total
<input type="checkbox"/> Residential	Record Count	2
<input type="checkbox"/> Commercial	Record Count	1
<b>Total</b>	<b>Record Count</b>	<b>3</b>

Below the table, there is a 'Details (3 Rows)' section with a filter 'buy: buy Name'. The details table shows the following rows:

buy: buy Name
1 Ramesh
2 Ramya
3 Raveena
4

## Milestone 11 - dashboard

The screenshot shows the Salesforce Dashboards interface. The top navigation bar is similar to the previous screenshot. The main navigation menu has tabs for 'property managem...', 'Leads', 'buyers', 'Rents', 'Loans', 'Customers', 'Reports', and 'Dashboards'. The 'Dashboards' tab is selected, displaying a list of recent dashboards. The table shows the following data:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
<b>Recent</b>	Ramya		Private Dashboards	RAMYA R	10/4/2023, 4:09 pm	

On the left side, there is a sidebar with navigation options: 'Created by Me', 'Private Dashboards', 'All Dashboards', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'.

### 4. Trailhead profile public URL

Team Lead - <https://trailblazer.me/id/ramyr28>

Team member 1 - <https://trailblazer.me/id/eraja35>

Team member 2 - <https://trailblazer.me/id/drark1>

Team member 3 - <https://trailblazer.me/id/drark2>

Team member 4 - <https://trailblazer.me/id/ssowmiya10>

### 5. ADVANTAGES & DISADVANTAGES:

- Rent for longer terms



- Pays rent on time
- Maintain the property
- Causes fewer problems

#### **DISADVANTAGES:**

- ✓ Expense
- ✓ Finding a reliable property manager
- ✓ Loss of control

#### **6. APPLICATIONS :**

A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties

#### **7. CONCLUSION:**

In conclusion property management system (PMS) software is very crucial for all the hotels.

The disadvantages of the opera PMS can be improved easily and as it was mentioned before a recommendation is the upgrade of opera V5 to Opera 9

#### **8. FUTURE SCOPE:**

Managing renters and securing new ones with proper screening process and legal entailment.

Maintenance and routine cleaning of the property , while preserving its value.