

PROJECT REPORT

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION

1.1 OVERVIEW:

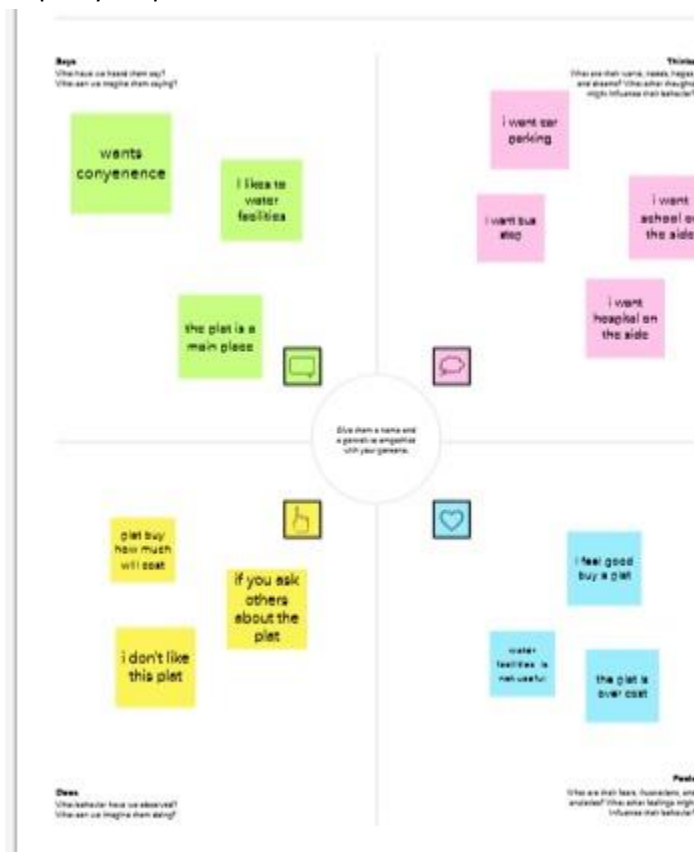
A professional or a business that deal with the day to day responsibility of real estate is called a property manager. Here we will explore the role of a property manager in real estate through online using the property management application using salesforce.

1.2 PURPOSE:

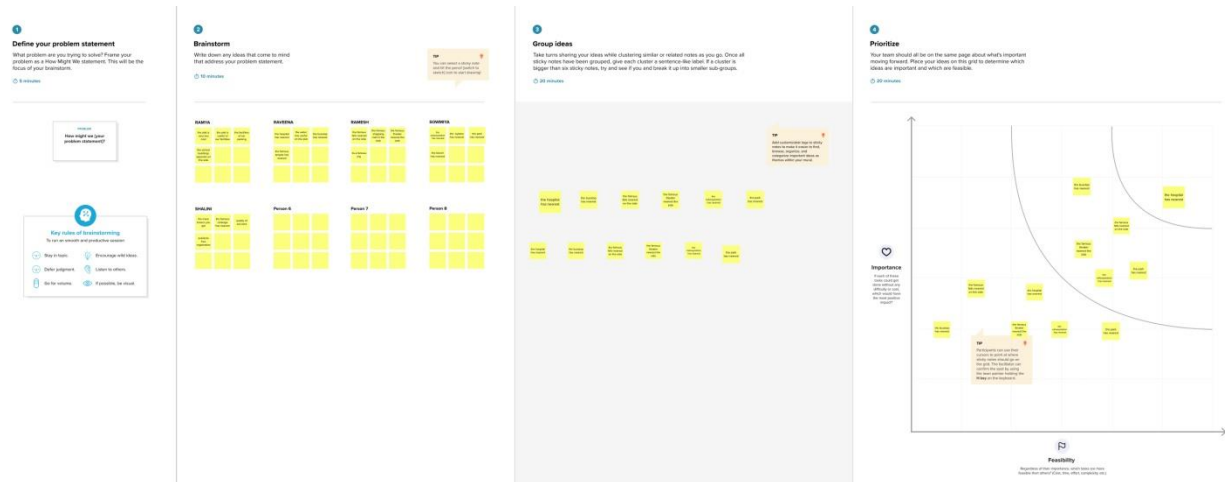
To develop an app for the property management where the buyer can order his requirements and get the appropriate details of the property.

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

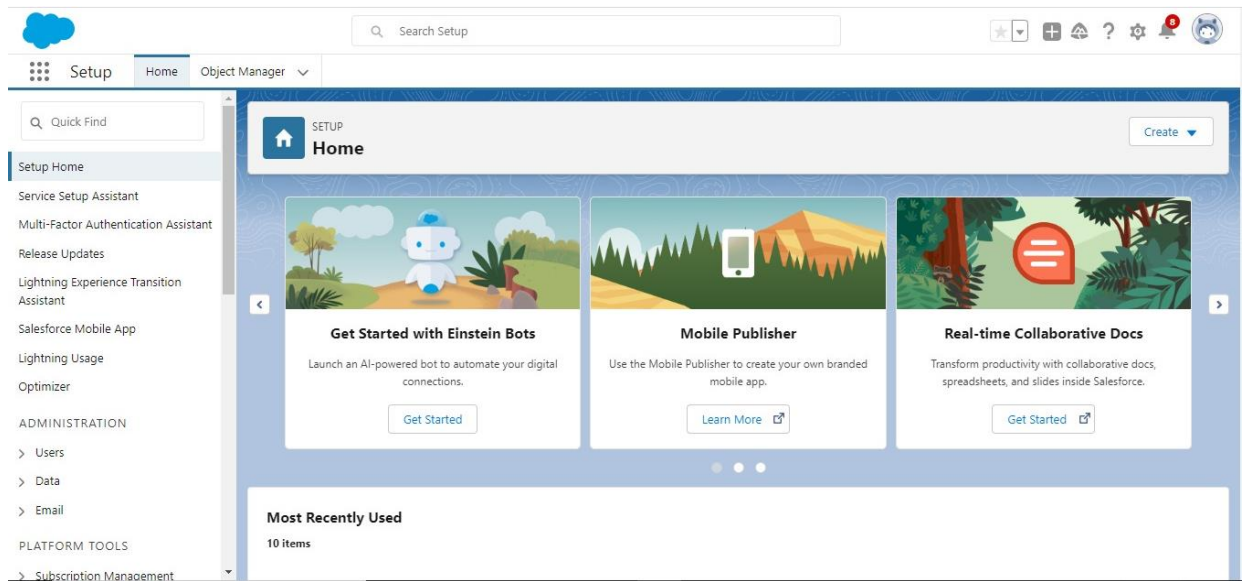
Select your job role

Company*
Company Name

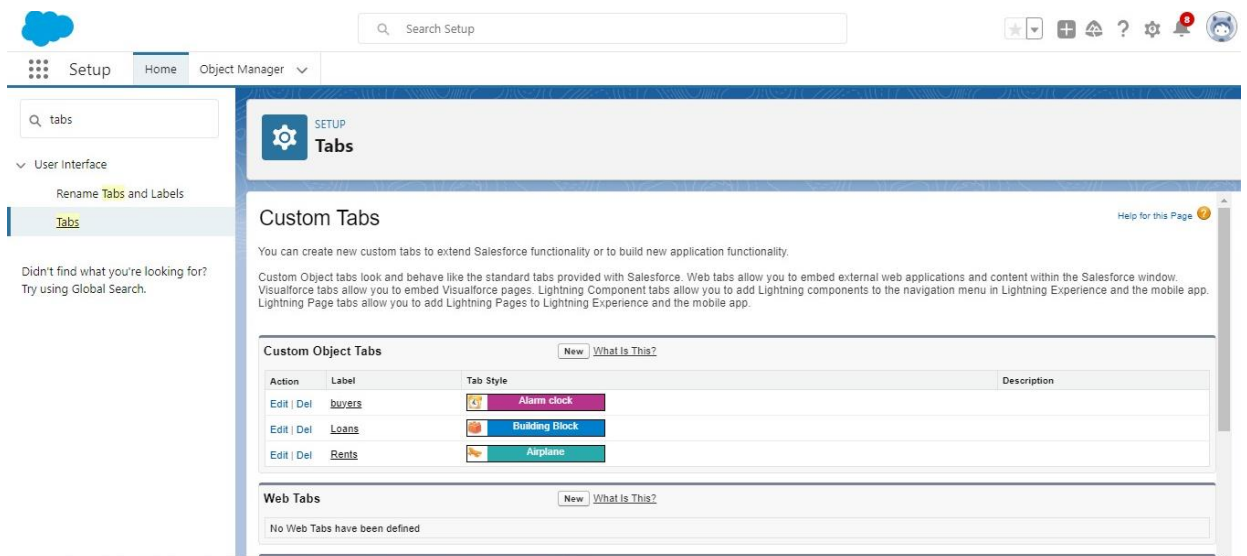
Build enterprise-quality apps fast to bring your ideas to life

- 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. The left sidebar has a search bar with 'profiles' and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows 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'.

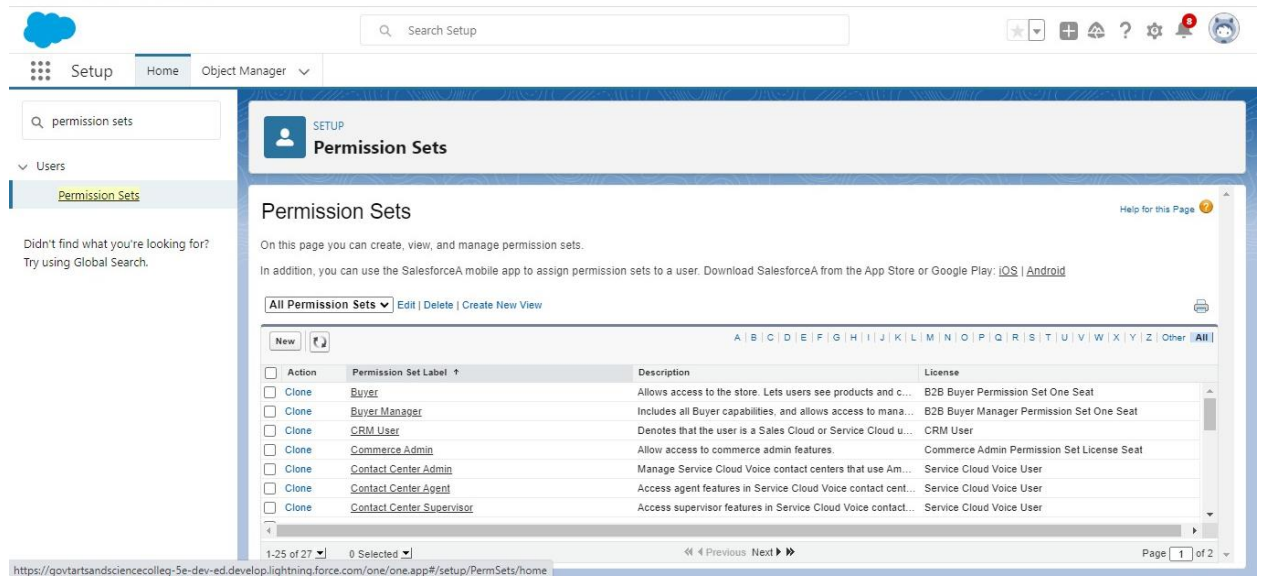
| Action | Profile Name | User License | Custom |
|---------------------------------------|----------------------------------|----------------------------------|-------------------------------------|
| <input type="checkbox"/> Edit Clone | Analytics Cloud Integration User | Analytics Cloud Integration 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 has a search bar with 'users' and a list of items including 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'All Users' and shows 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.00d2w00000r9o8eaj.Tbdiosf@vysa@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@00d2w00000r9o8eaj.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security | sec | insightsecurity@00d2w00000r9o8eaj.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

Milestone 8 –Permission Sets



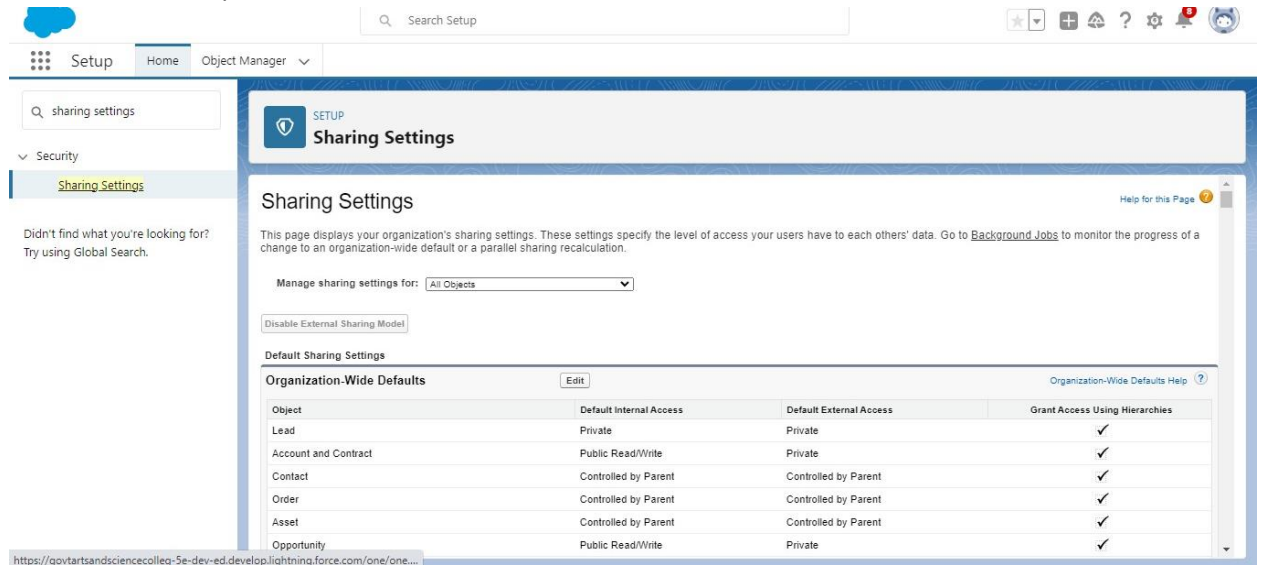
The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar with 'permission sets' and a navigation menu with 'Users' and 'Permission Sets' (highlighted). The main content area has a 'SETUP' header and a 'Permission Sets' title. Below the title is a description: '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](#)'.

Below the description is a table of all permission sets. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists several permission sets, including 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', and 'Contact Center Supervisor'. The 'Buyer' permission set is selected.

| Action | Permission Set Label | Description | License |
|--------------------------|----------------------|---------------------------|--|
| <input type="checkbox"/> | Clone | Buyer | B2B Buyer Permission Set One Seat |
| <input type="checkbox"/> | Clone | Buyer Manager | B2B Buyer Manager Permission Set One Seat |
| <input type="checkbox"/> | Clone | CRM User | CRM User |
| <input type="checkbox"/> | Clone | Commerce Admin | Commerce Admin Permission Set License Seat |
| <input type="checkbox"/> | Clone | Contact Center Admin | Service Cloud Voice User |
| <input type="checkbox"/> | Clone | Contact Center Agent | Service Cloud Voice User |
| <input type="checkbox"/> | Clone | Contact Center Supervisor | Service Cloud Voice User |

At the bottom of the table, it shows '1-25 of 27' and '0 Selected'. The page number 'Page 1 of 2' is also visible.

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' (highlighted). The main content area has a 'SETUP' header and a 'Sharing Settings' title. Below the title is a description: '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.'

Below the description is a section for 'Manage sharing settings for: All Objects'. There is a button to 'Disable External Sharing Model'.

Below that is a section for 'Default Sharing Settings'. It includes a table for 'Organization-Wide Defaults' with 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'.

| 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 | ✓ |

Milestone 10 – Report

The screenshot shows the Salesforce Reports interface. The top navigation bar includes a search bar and icons for various functions. The main menu shows 'property managem...' with sub-menus for 'Leads', 'buyers', 'Rents', 'Loans', 'Customers', 'Reports', and 'Dashboards'. The 'Reports' menu is selected, displaying a 'Report: buyers' section with a 'New buyers Report' card. The card includes a 'Total Records' count of 3 and a table with columns for 'Property Type', 'Discount', and 'Total'. The table shows 2 records for Residential and 1 for Commercial, totaling 3 records. Below the table is a 'Details (3 Rows)' section with a table listing the names of the buyers: Ramesh, Ramya, and Raveena.

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

| buy: buy Name |
|---------------|
| 1 Ramesh |
| 2 Ramya |
| 3 Raveena |
| 4 |

Milestone 11 - dashboard

The screenshot shows the Salesforce Dashboards interface. The top navigation bar includes a search bar and icons for various functions. The main menu shows 'property managem...' with sub-menus for 'Leads', 'buyers', 'Rents', 'Loans', 'Customers', 'Reports', and 'Dashboards'. The 'Dashboards' menu is selected, displaying a 'Dashboards' section with a 'Recent' dashboard card. The card includes a 'Search recent dashboards...' bar and buttons for 'New Dashboard' and 'New Folder'. Below the card is a table with columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The table shows one dashboard named 'Ramya' created by 'RAMYA R' on '10/4/2023, 4:09 pm'. The left sidebar shows a list of folders and favorites.

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

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/drark>
- 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.