

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1 INTRODUCTION

1.1 Overview

A property management system (PMS) is a software application for the operations of hospitality accommodations and commercial residential rental properties. PMS is also used in manufacturing industries, local government and manufacturing.

1.2 Purpose

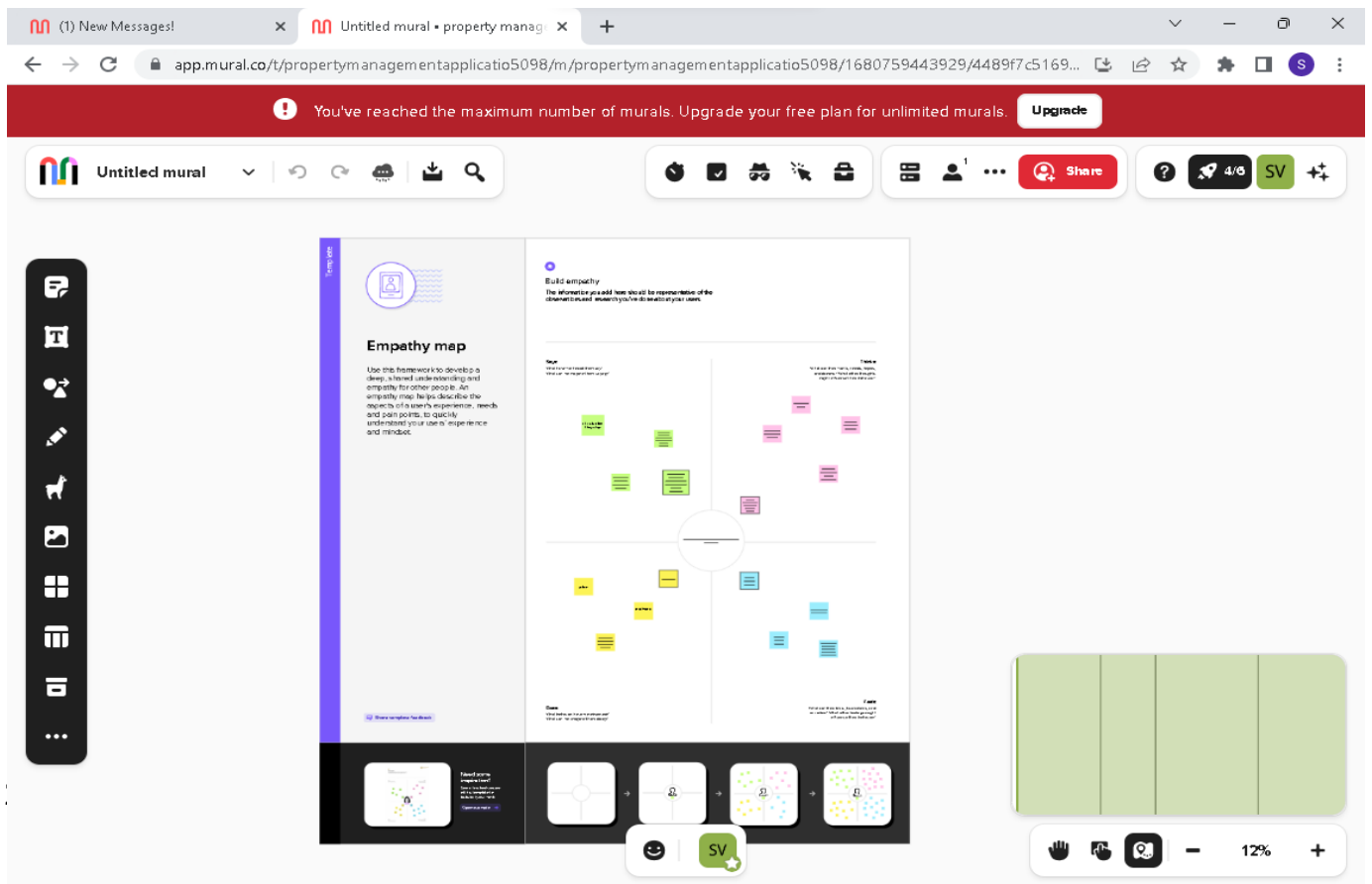
Property management is the oversight of real estate by a third party.

Property managers can manage various types of property: residential, commercial, industrial, and property for special purposes.

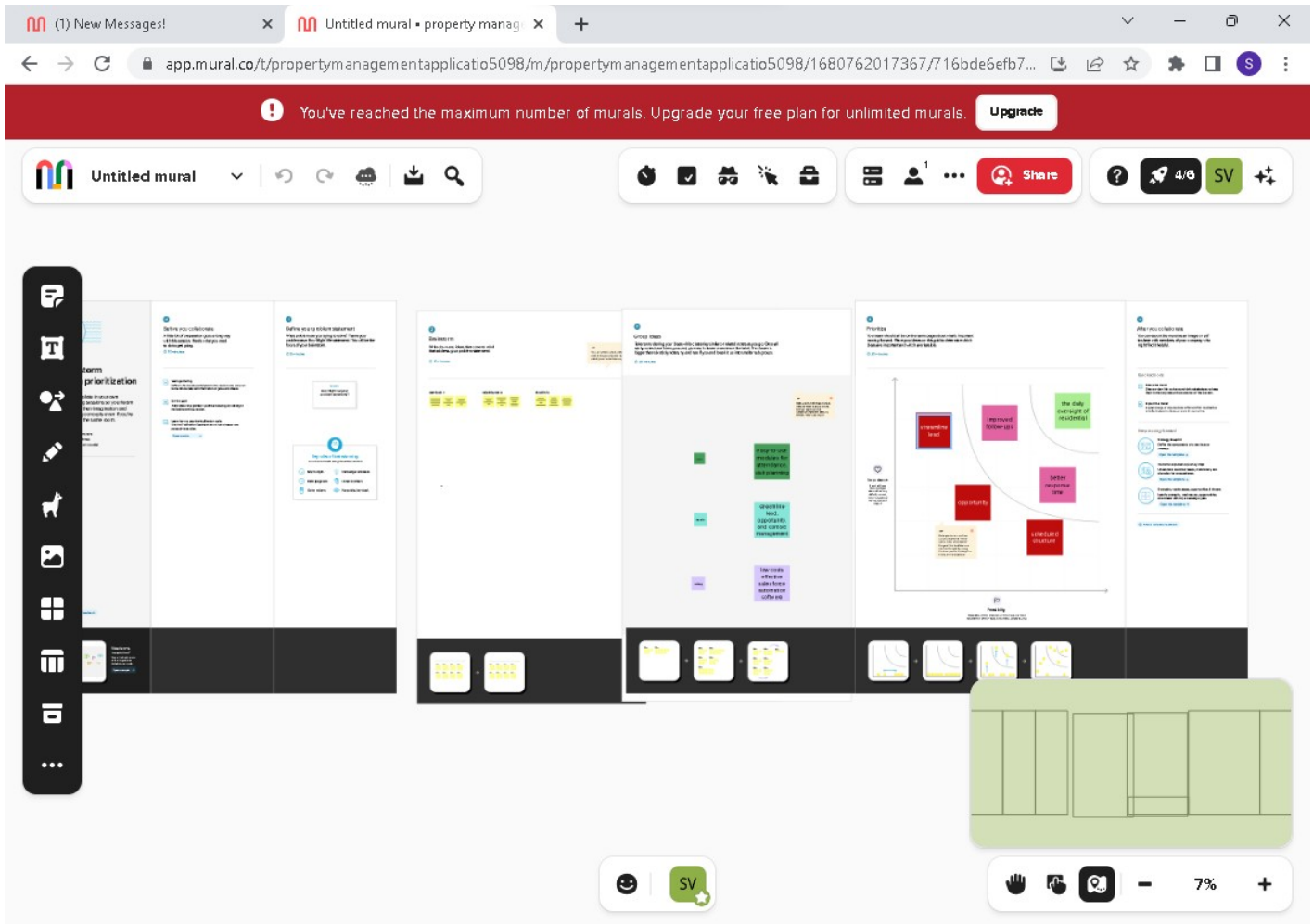
Property managers are generally responsible for the day-to-day operations of the real estate, from screening tenants to arranging for repairs and maintenance.

2 Problem Definition & Design Thinking

2.1 Empathy MaP



2.2 Ideation & Brainstorming Map



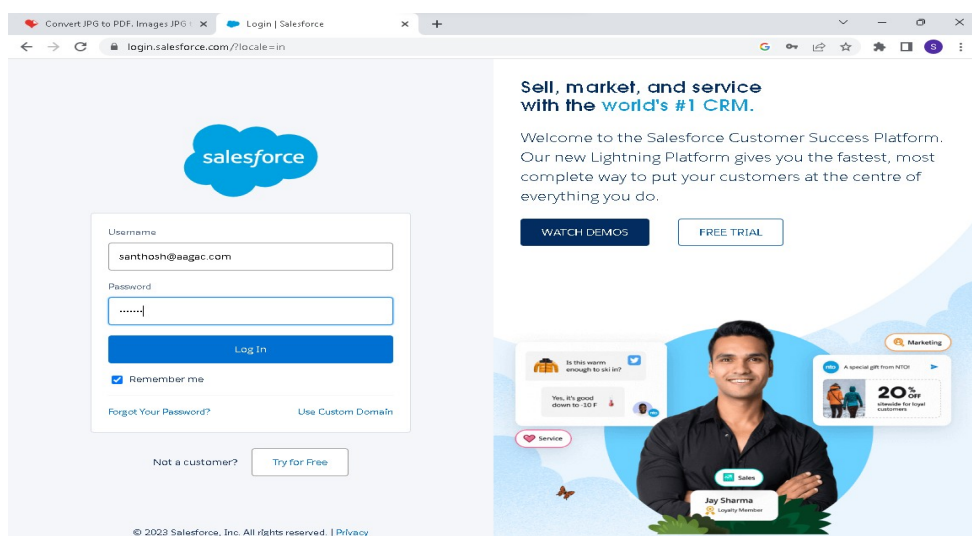
3 RESULT

3.1 Data Model;

| Object name | Fields in the object | |
|-------------|----------------------|-----------|
| obj1 | Field label | Data type |
| | Buy | text |
| obj2 | Field label | Data type |
| | Rent | Text |

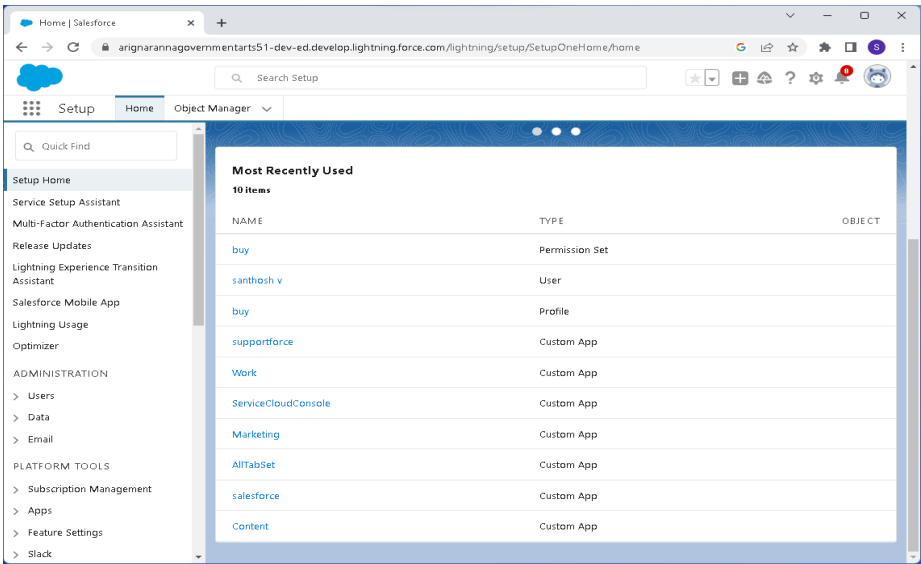
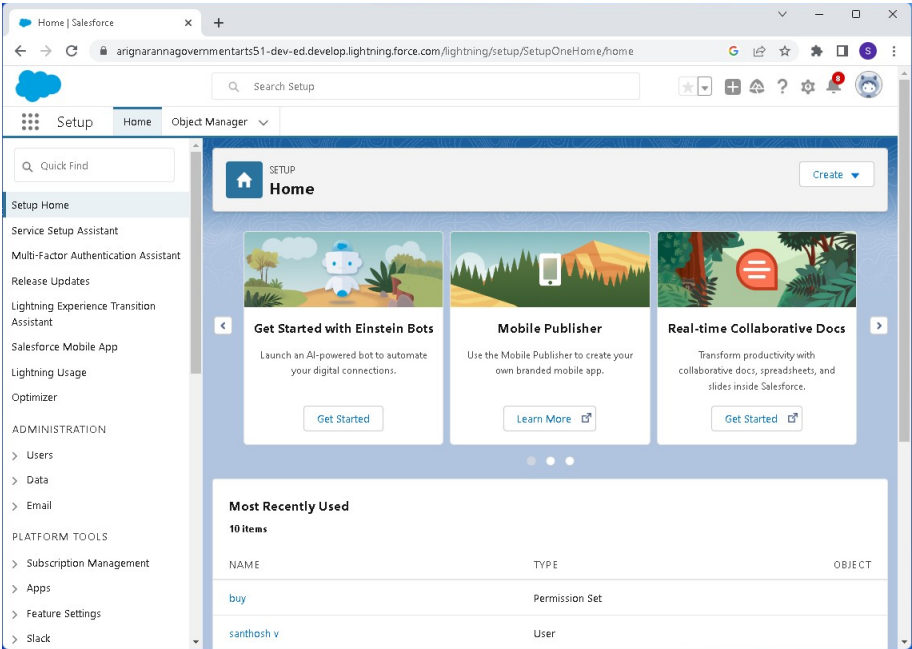
3.2 Activity & Screenshot Milestone 1

Activity 1

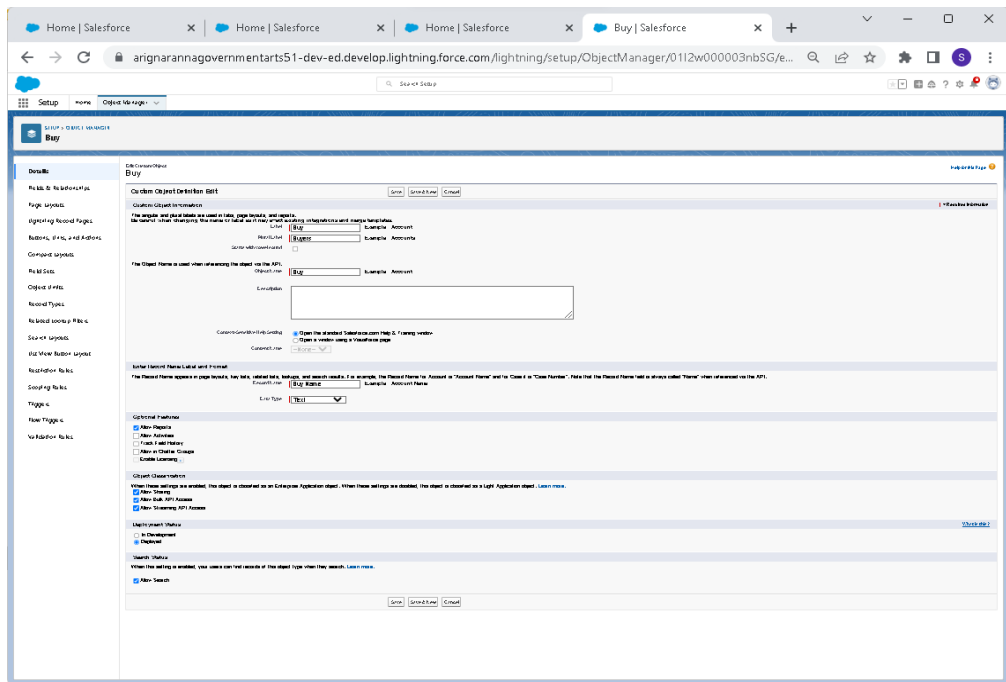


Milestone 2

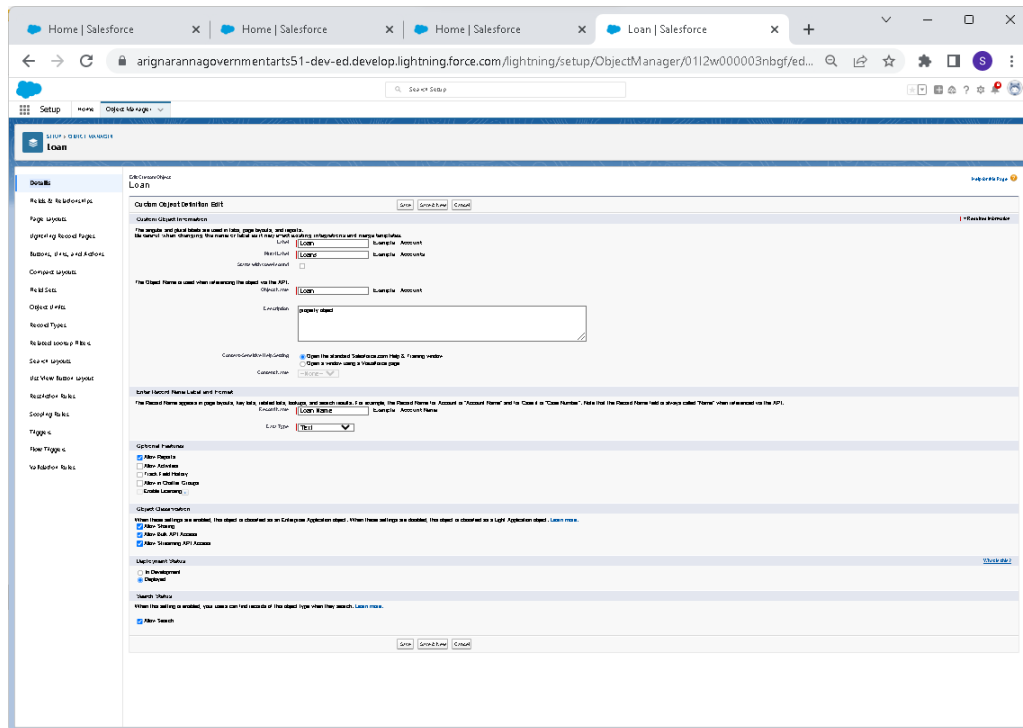
Activity 1:



Activity 2:

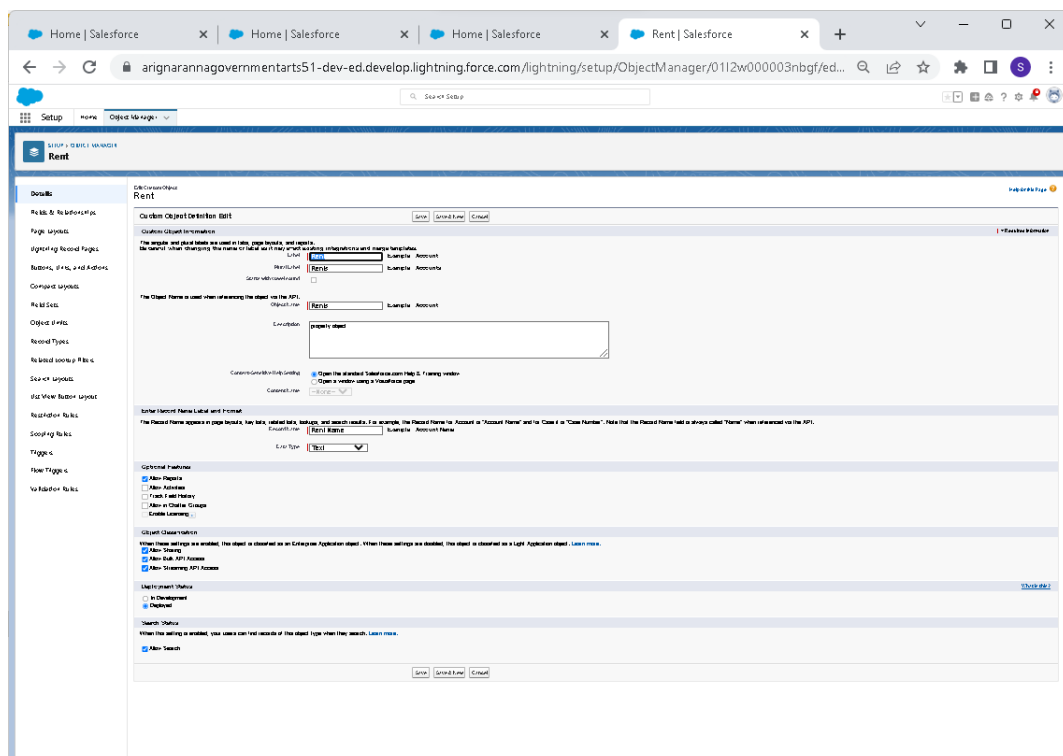


Activity 3:



The screenshot shows the Salesforce Setup interface for the 'Loan' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'Custom Object Definition Edit' and includes sections for 'Custom Object Information', 'The Object Name is used when referencing the object via the API', 'Custom Object Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', and 'Search Status'. The 'Loan' object is currently selected, and the 'Loan Name' field is highlighted in the 'Custom Object Information' section.

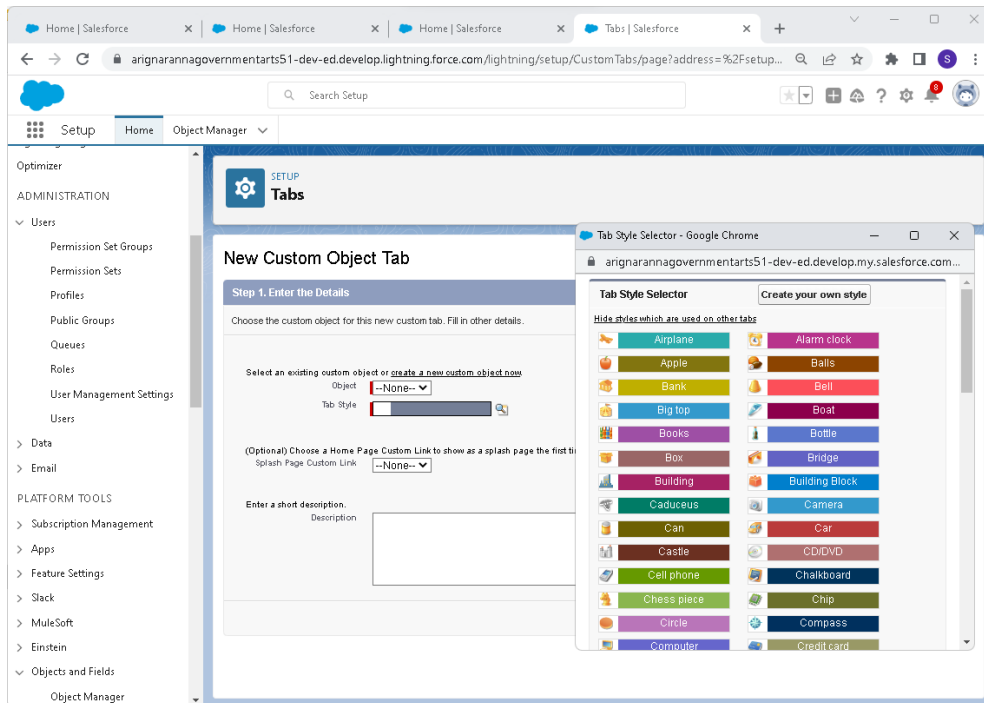
Activity3:



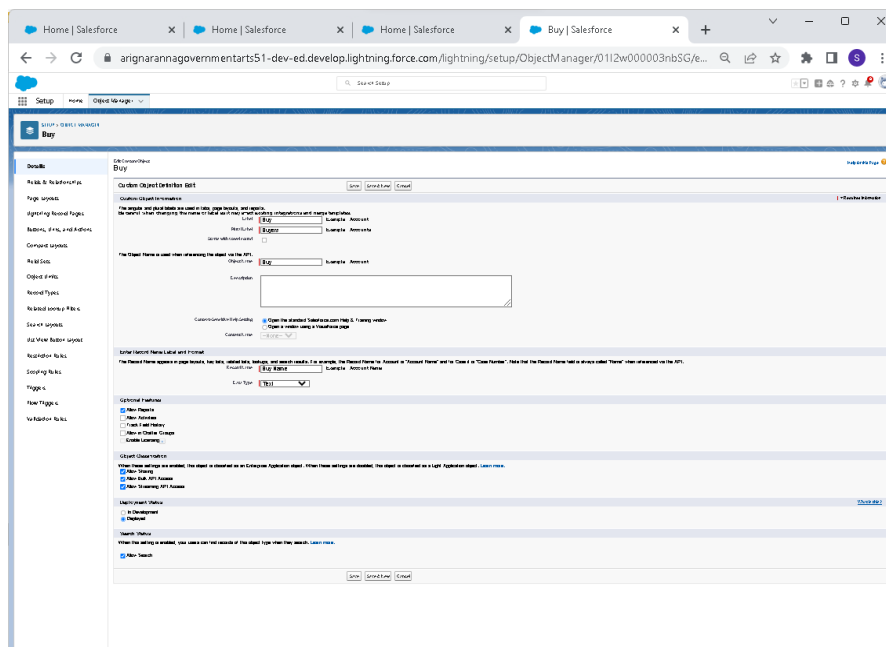
The screenshot shows the Salesforce Setup interface for the 'Rent' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'Custom Object Definition Edit' and includes sections for 'Custom Object Information', 'The Object Name is used when referencing the object via the API', 'Custom Object Label and Format', 'Optional Features', 'Object Classification', 'Deployment Status', and 'Search Status'. The 'Rent' object is currently selected, and the 'Rent Name' field is highlighted in the 'Custom Object Information' section.

Milestone 3

Activity 1:



Activity 2:



Activity 3:

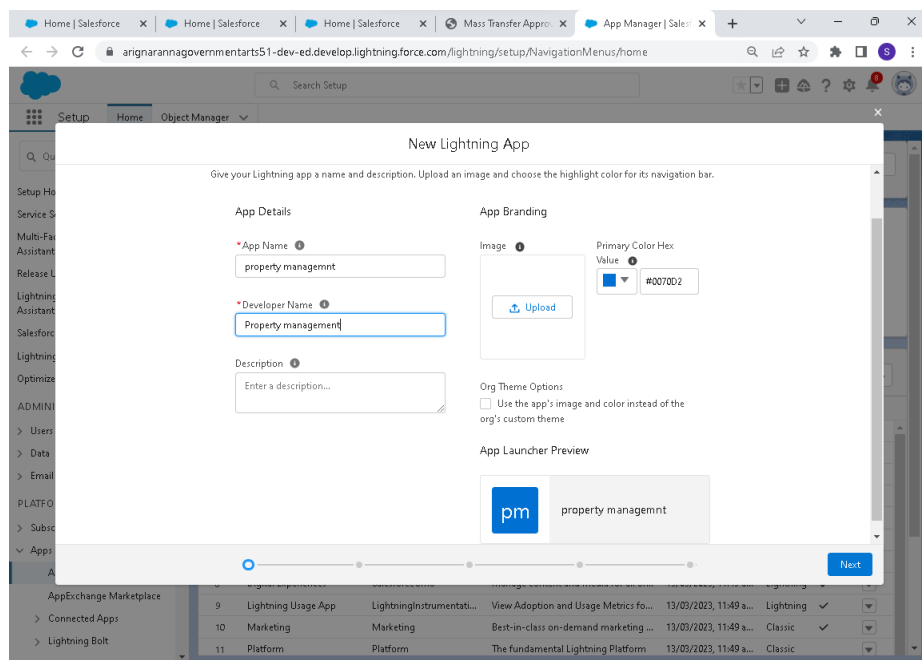
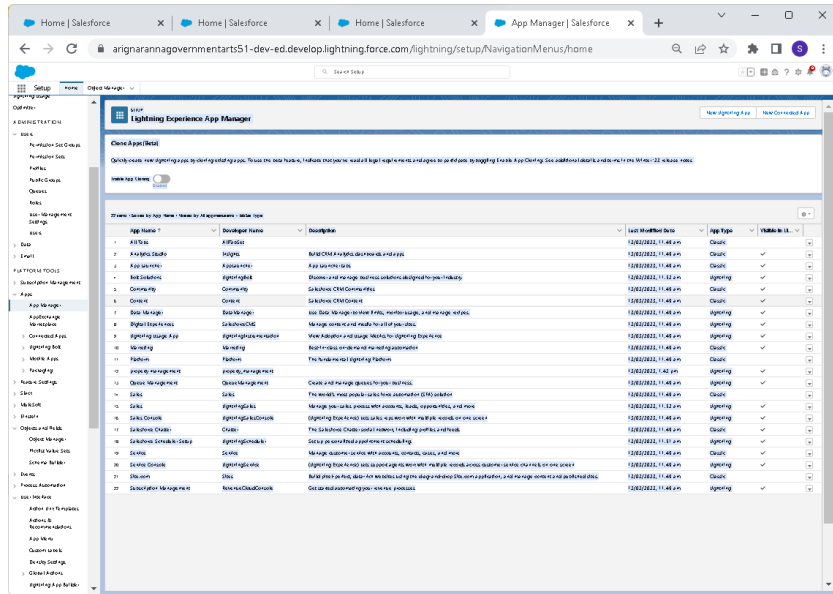
[illegible]

Activity 4:

[illegible]

Milestone 4

Activity 1:



Home | Salesforce x Home | Salesforce x Home | Salesforce x Mass Transfer Appro x property managemen x

arignarannagovernmentarts51-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000004daTDAAY...

Lightning App Builder App Settings Pages property management Help

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items**
- User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods
- Assets
- Async Operation Logs

Selected Items

No items selected

javascript:void(0);

Home | Salesforce x Home | Salesforce x Home | Salesforce x Mass Transfer Appro x property managemen x

arignarannagovernmentarts51-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000004daTDAAY...

Lightning App Builder App Settings Pages property management Help

App Settings

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- Navigation Items
- User Profiles**

User Profiles

Choose the user profiles that can access this app.

Available Profiles

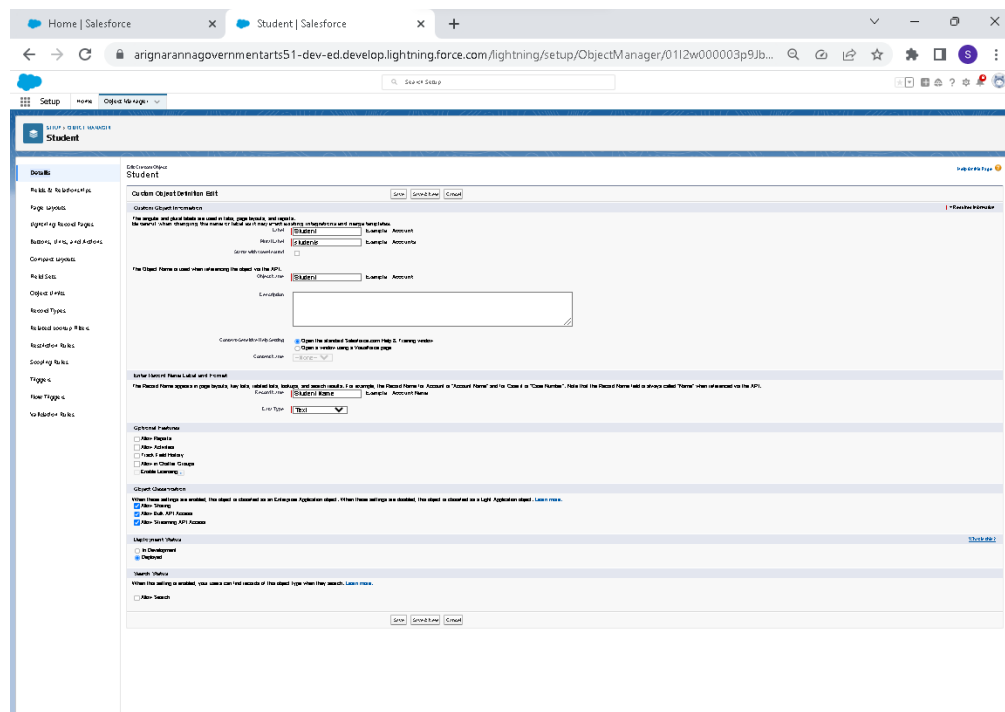
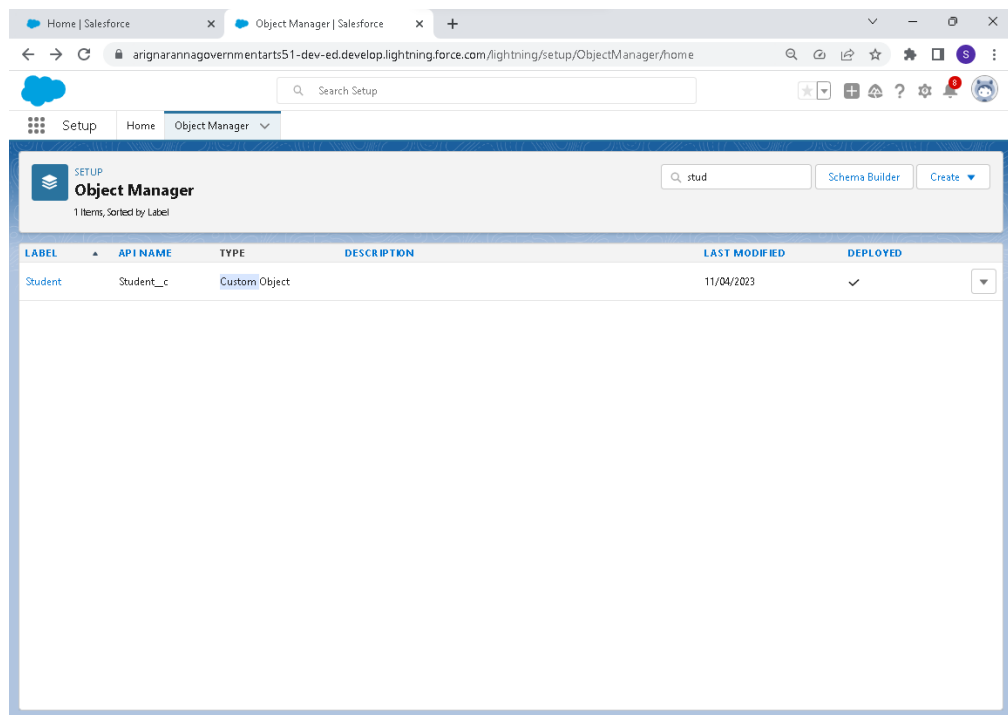
- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- buy
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User
- Customer Community Plus User
- Customer Community User

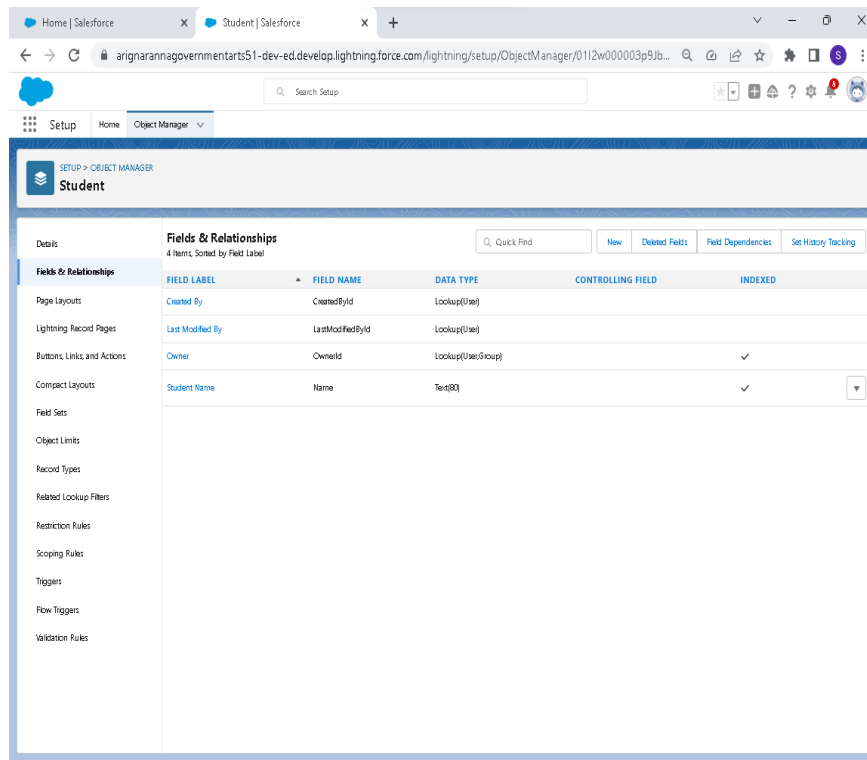
Selected Profiles

No Profiles selected

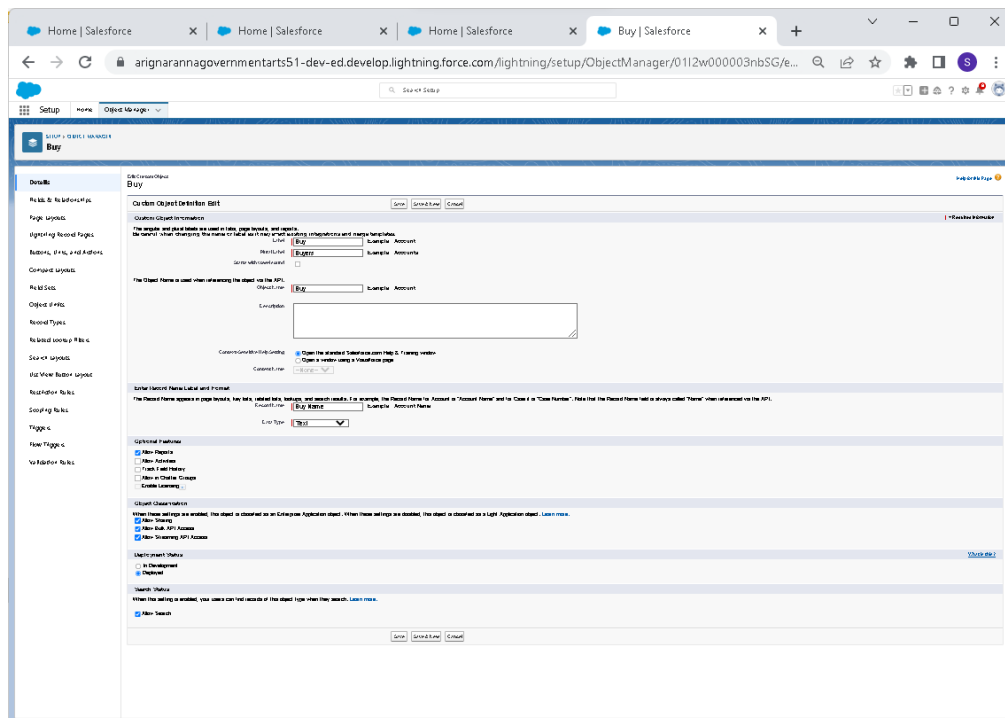
javascript:void(0);

Milestone 5





Activity 2:



Activity 3:

[illegible]

Activity 4:

Home | Salesforce x Student | Salesforce x +

arignarannagovernmentarts51-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p9Jb...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student

Details

Fields & Relationships

4 items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|-------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(UserGroup) | ✓ | |
| Student Name | Name | Text(255) | ✓ | ▼ |

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

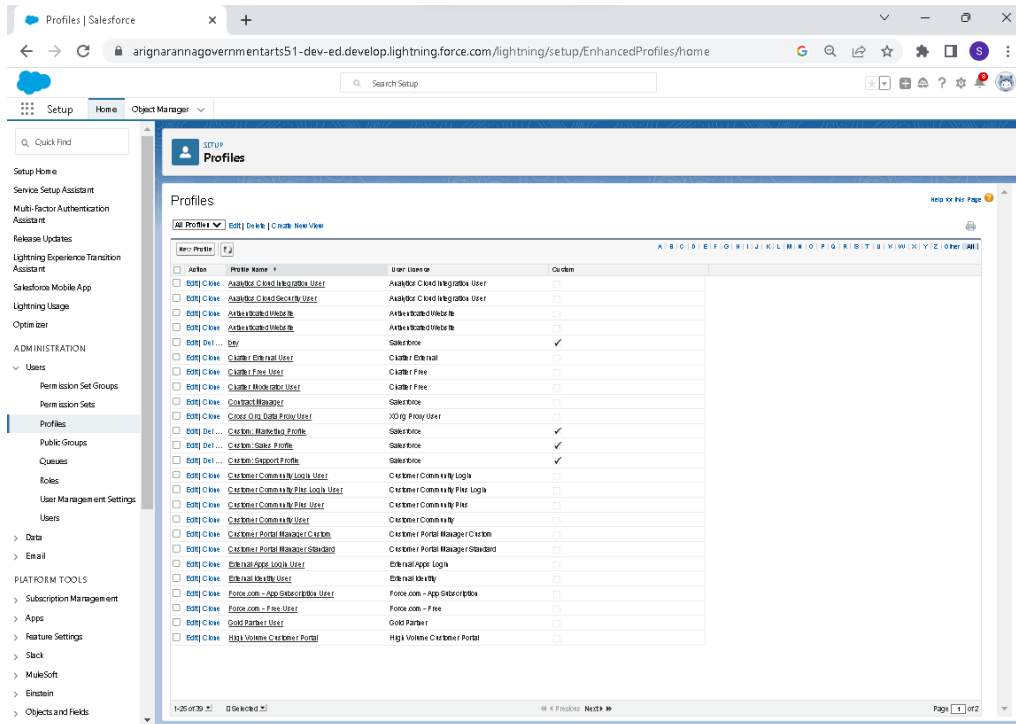
Triggers

Flow Triggers

Validation Rules

Milestone 6:

Activity 1:



The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with the following sections: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users (with sub-items: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), Data, Email, PLATFORM TOOLS (with sub-items: Subscription Management, Apps, Feature Settings, Slack). The 'Profiles' page is selected under the ADMINISTRATION section. The main content area displays a table of profiles with columns for 'Profile Name', 'Record Types', and 'Permissions'. The table lists various profiles such as 'Chordbit Shifting Event Store', 'Credit Memo', 'Credit Memo Invoice Application', 'Customers', 'CRM Companies', 'Data Use Legal Base', 'Data Use Purpose', 'Digital Assets', 'Documents', 'Duplicate Record Info', 'Engagement Channel Types', 'Entitlements', 'Entitlement Contracts', 'Finance Balance Inquiries', 'Finance Transactions', 'Gateway Provider Payment Method Types', 'Issues', 'Inquiries', 'Instances', 'Individuals', 'Invoices', and 'Leads'. Each profile has checkboxes for 'Record Types' and 'Permissions'. The 'Entitlements' profile is highlighted in blue. At the bottom, there are tabs for 'Basic Access' and 'Data Administration' for each profile.

Milestone 7

Activity 1:

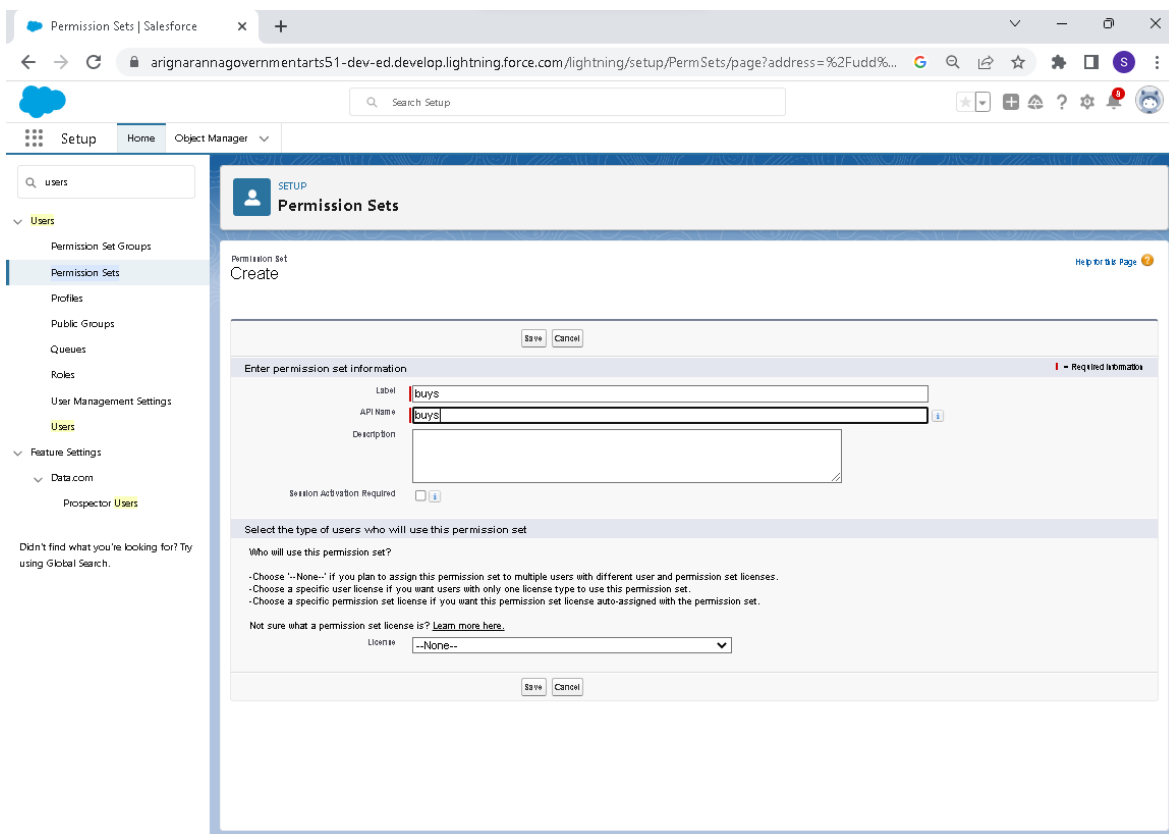
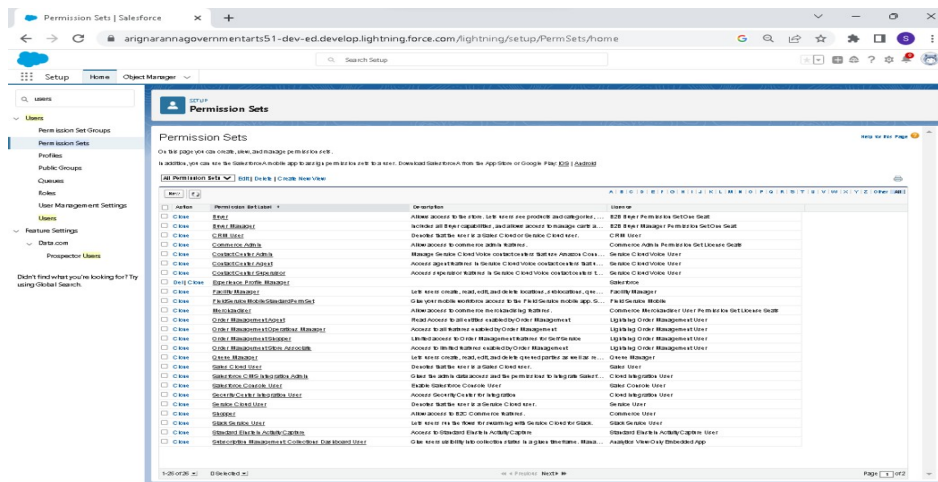
The screenshot shows the Salesforce Setup page for Users. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and Users. The main content area is titled "All Users" and displays a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

| Action | Full Name | Alias | Username | Role | Active | Profile |
|----------------------|------------------|-------------|---|------|--------|----------------------------------|
| Edit | Chatter Expert | Chatter | chatter.0052w00000000000@chatter.salesforce.com | | ✓ | Chatter Free User |
| Edit | User Integration | Integration | integration@0042w00000000000@chatter.com | | ✓ | Analytics Cloud Integration User |
| Edit | User Security | sec | security@0042w00000000000@chatter.com | | ✓ | Analytics Cloud Security User |
| Edit | V. Santhosh | SV | santhosh@saapac.com | | ✓ | System Administrator |
| Edit | v. santhosh | stt | santhoshkpk2003@gmail.com | | ✓ | Chatter External User |

The screenshot shows the Salesforce Setup page for New User. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and Users. The main content area is titled "New User" and displays a form for creating a new user. The form has sections for General Information and User Settings. The General Information section includes fields for First Name, Last Name, Alias, Email, Username, Password, Title, Company, Department, and Division. The User Settings section includes fields for Role, User License, Profile, Active, Working User, Offline User, Knowledge User, Photo User, Service Cloud User, Salesforce Contributor User, Salesforce Publisher User, iDOC User, Default User Type, Data.com Monthly Addition Limit, Accountability Mode (Classic Org), High-Contrast Theme on Charts, Load Lightning Page While Scrolling, Debug Mode, Quick Access Menu, Salesforce CRM Content User, Receive Salesforce CRM Content Alerts, Receive Salesforce CRM Content Alerts by Email, Allow Forwarding, and Call Center.

Milestone 8

Activity 1:



Permission Sets | Salesforce

arignarannagovernmentarts51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2...

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

Permission Sets

Permission Set Overview

Find Settings... Clone Details Edit Properties Manage Assignments

Permission Set: **Duys**

Description: **Duys**

Users or Groups: **Users**

Requires Activation: ☐

Created By: **Saikat** | **16/04/2023, 1:02 pm**

Apps

Assigned Apps

Settings: Salesforce apps are visible in the app menu

Assigned Connected Apps

Settings: Salesforce connected apps are visible in the app menu

Object Settings

Permissions: Manage objects and fields, and settings such as tab availability

App Permissions

Permissions: Perform app-specific actions, such as "Manage Call Center"

App Class Access

Permissions: Manage App classes

Marketing Cloud Access

Permissions: Manage via Salesforce pages

External Data Source Access

Permissions: Manage external data sources

Flow Access

Permissions: Manage Flow

Named Credential Access

Permissions: Manage named credentials

Custom Permissions

Permissions: Manage custom permissions and apps

Custom Metadata Types

Permissions: Manage custom metadata types

Custom Settings Definitions

Permissions: Manage custom settings

System

Permission Sets | Salesforce

arignarannagovernmentarts51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS2w00000AIOAB/Per...

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

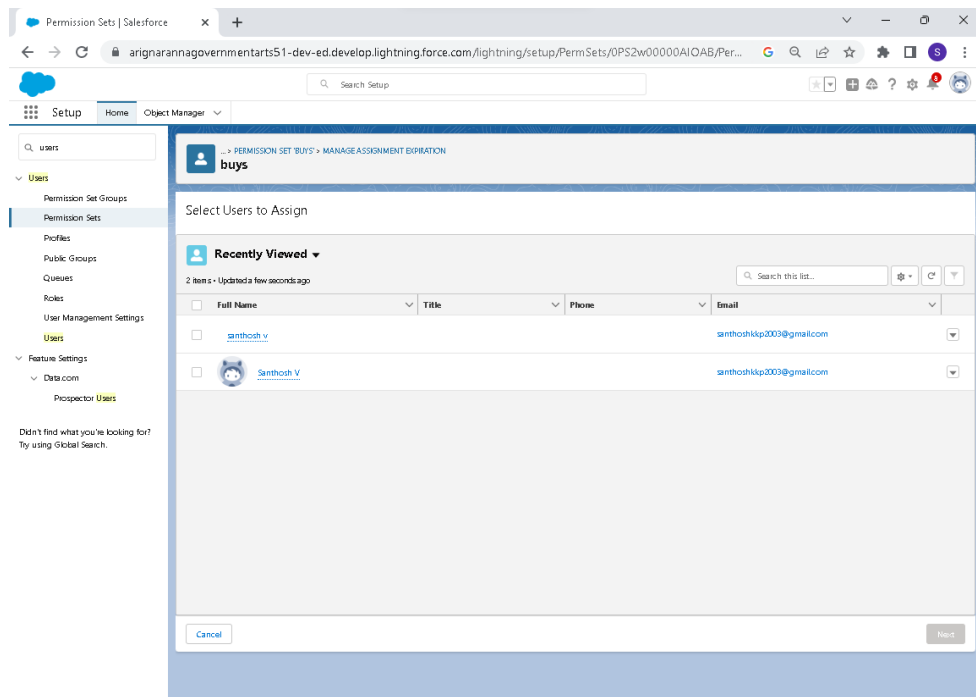
Didn't find what you're looking for? Try using Global Search.

buys

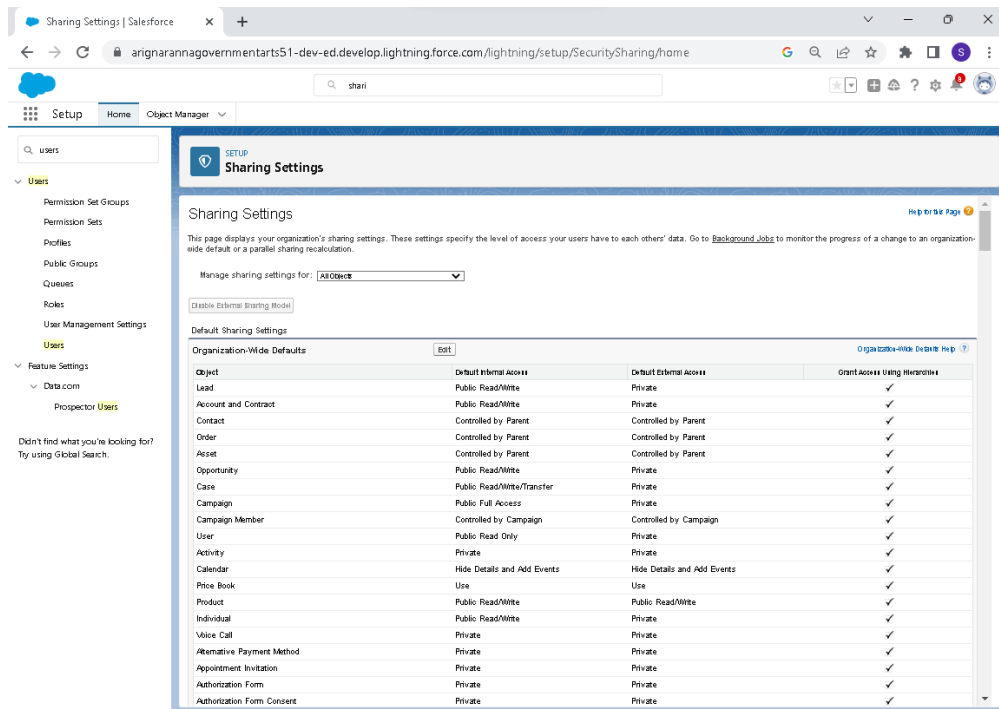
Current Assignments

Add Assignment

No assignments defined.



Milestone 9 Activity 1:



Milestone 10

Activity 1:

Reports | Salesforce

arignarannagovernmentarts51-dev-ed.develop.lightning.force.com/lightning/r/Report/home?queryScope=mru

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Reports Recent 2 Items

Search recent reports... New Report New Folder

| REPORTS | Report Name | Description | Folder | Created By | Created On | Subscribed |
|-----------------|----------------------------------|---|-----------------|-------------------|---------------------|------------|
| Recent | New Accounts Report | | Private Reports | Santhosh V | 17/3/2023, 11:10 am | |
| Created by Me | Sample Flow Report: Screen Flows | Which flows run, what's the status of each interview, and how long do users take to complete the screens? | Public Reports | Automated Process | 13/3/2023, 11:49 am | |
| Private Reports | | | | | | |
| Public Reports | | | | | | |
| All Reports | | | | | | |
| FOLDERS | | | | | | |
| All Folders | | | | | | |
| Created by Me | | | | | | |
| Shared with Me | | | | | | |
| FAVORITES | | | | | | |
| All Favorites | | | | | | |

To Do List

New Accounts Report | Salesforce

arignarannagovernmentarts51-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000DL0k4EAD/view

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter New Accounts Report More

Report: Accounts New Accounts Report

Enable Field Editing Add Chart Edit

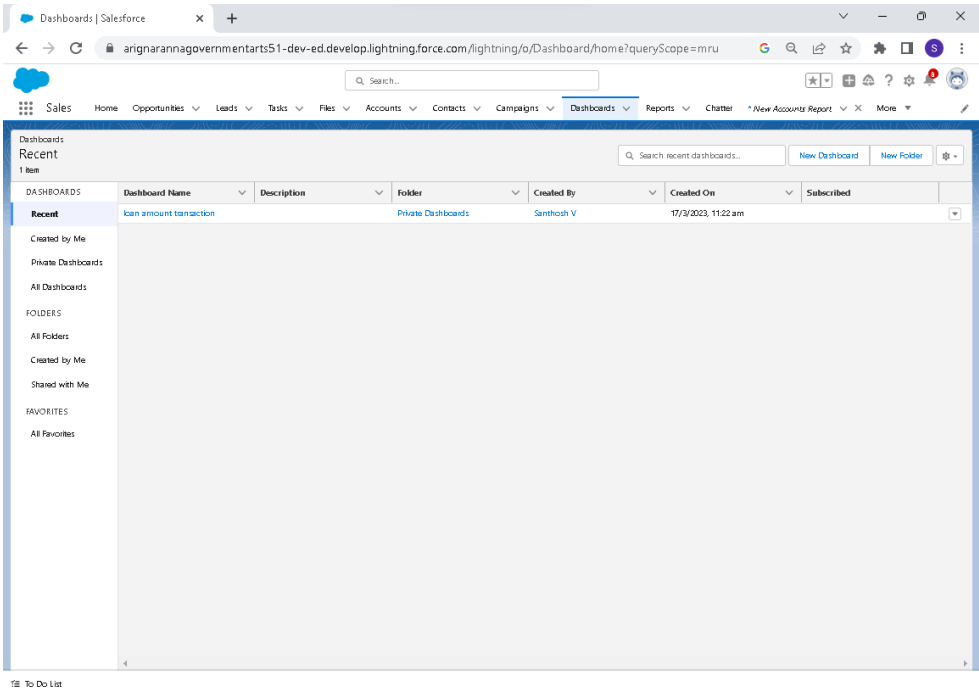
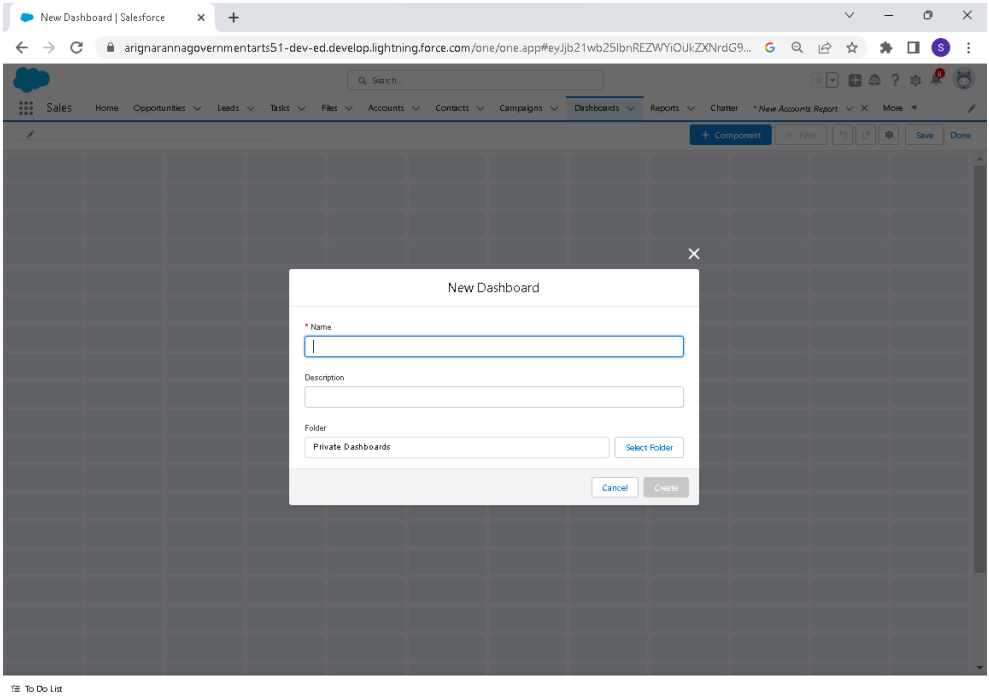
Total Records: 12

| | Last Activity | Account Owner | Account Name | Billing State/Province | Type | Rating | Last Modified Date |
|----|---------------|---------------|-------------------------------------|------------------------|--------------------|--------|--------------------|
| 1 | - | Santhosh V | sforce | CA | - | - | 13/03/2023 |
| 2 | - | Santhosh V | United Oil & Gas Corp. | NY | Customer - Direct | Hot | 13/03/2023 |
| 3 | - | Santhosh V | University of Arizona | AZ | Customer - Direct | Warm | 13/03/2023 |
| 4 | - | Santhosh V | Express Logistics and Transport | OR | Customer - Channel | Cold | 13/03/2023 |
| 5 | - | Santhosh V | Grand Hotels & Resorts Ltd | IL | Customer - Direct | Warm | 13/03/2023 |
| 6 | - | Santhosh V | Dickenson plc | KS | Customer - Channel | - | 13/03/2023 |
| 7 | - | Santhosh V | Pyram id Construction Inc. | - | Customer - Channel | - | 13/03/2023 |
| 8 | - | Santhosh V | Burlington Textiles Corp of America | NC | Customer - Direct | Warm | 13/03/2023 |
| 9 | - | Santhosh V | Edge Communications | TX | Customer - Direct | Hot | 13/03/2023 |
| 10 | - | Santhosh V | United Oil & Gas, Singapore | Singapore | Customer - Direct | - | 13/03/2023 |
| 11 | - | Santhosh V | United Oil & Gas, UK | UK | Customer - Direct | - | 13/03/2023 |
| 12 | - | Santhosh V | GenePoint | CA | Customer - Channel | Cold | 13/03/2023 |

To Do List

Milestone 11

Activity 1:



4 Trailhead profile public URL

Team Lead-<https://trailblazer.me/id/santv29>

Team Member 1 -<https://trailblazer.me/id/niros27>

Team Member 2-<https://trailblazer.me/id/rajes1149>

Team Member 3-Absent

5 ADVANTAGES & DISADVANTAGE

Advantages

1. Rent long-term
2. Pay rent on time
3. Minimise the wear and tear of the property
4. Cause fewer problems

Disadvantage

- You will work with someone who has experience
- Your properties will have less tenant turnover
- You will have a lot more time for yourself
- They will cost money

6 APPLICATION

- Scalable for massive projects, many locations, or many personnel
- Created with contractors, builders, and infrastructure developer in mind
- Made with contractors, construction professionals, and infrastructure developers in mind

7 CONCLUSION

- In conclusion, property management system (PMS) software is very crucial for all the hotels.
- Especially opera PMS constitutes the most appropriate PMS software for Hilton Athens.

8 FUTURE SCOPE

- Maintenance and routine cleaning of the property, while preserving its value
- Budgeting expenses of the property
- Managing renters and securing new ones with proper screening process and legal entailment

