

PROPERTY REPORT

INTRODUCTION

1.1 OVERVIEW

In my project they are 11 milestones and we complete this milestones. As manual we created this milestones step by step.

1. In this we create developer account and sign it and then login to our salesforce account.
2. In this we create object names and we can save all objects namely Buy, Rent and Loan.
3. In this we build records for objects and then select tap and tap style for all objects.
4. In this we create app namely Property Management and add suitable items.
5. In this we created new field for Buy, Rent and Loan.
6. In this we create event user profile and sales profile.
7. In this we create user and as a sales profile.
8. In this we create permission set for supplier and review object.
9. In this we access OWD setting in salesforce such as marketing and sales.
10. In this we create report for Loan amount and accounts.
11. In this we create dashboard for account and new lead with loan report.

1.2 PURPOSE

- Enhance communication and collaboration tools.
- Centralize management of all tenure contracts, units and other data.
- The use of a property management system helps you to keep details, records and information forever.
- A management system, you do not have to be present at all times to manage your property.
- You have access to it from virtually anywhere in the world.

- Payments can even be made via the property management system.
- Have reminders and notifications of important events, emails, and calls.
- Integrate a website with a customer portal to allow for requests, client profiles, account statements, etc...

2.1 EMPATHY MAP



2.2 IDEATION & BRAINSTORMING MAP

Brainstorm & idea prioritization

Use this template to your best brainstorming session so your team can unleash their imagination and start shaping concepts even if you're not sitting at the same table.

- 4 slides to prepare
- 1 slide to summarize
- 10 pages to work on

Before you collaborate

1. Take 10 minutes to prepare your meeting with the team. Share your project with the group.

2. Prepare your meeting space.

3. Set the agenda for the meeting.

4. Set the agenda for the meeting.

Define your problem statement

What problem are you trying to solve? How does your problem fit into the bigger picture? The solution should be based on your research.

1. Define your problem statement.

Brainstorm

What ideas do you have for solving the problem? How does your problem statement fit into the bigger picture? The solution should be based on your research.

2. Brainstorm ideas.

Group ideas

How can you group your ideas into clusters? How does your problem statement fit into the bigger picture? The solution should be based on your research.

3. Group ideas.

Prioritize

How can you prioritize your ideas? How does your problem statement fit into the bigger picture? The solution should be based on your research.

4. Prioritize ideas.

After you collaborate

How can you summarize your ideas? How does your problem statement fit into the bigger picture? The solution should be based on your research.

5. Summarize ideas.

RESULT

3.1 DATA MODEL

Object Name	Fields in the Object												
Lead	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Lead</td><td>Auto Number</td></tr><tr><td>State</td><td>Picklist Field</td></tr><tr><td>City</td><td>Picklist</td></tr><tr><td>Email</td><td>Email</td></tr><tr><td>Phone</td><td>Phone</td></tr></table>	Field Label	Data Type	Lead	Auto Number	State	Picklist Field	City	Picklist	Email	Email	Phone	Phone
Field Label	Data Type												
Lead	Auto Number												
State	Picklist Field												
City	Picklist												
Email	Email												
Phone	Phone												
Buy	<table><tr><th>Field Label</th><th>Date Type</th></tr><tr><td>Property type</td><td>Picklist</td></tr><tr><td>Discount</td><td>Percentage</td></tr><tr><td>State</td><td>Picklist Field</td></tr><tr><td>City</td><td>Picklist Field</td></tr></table>	Field Label	Date Type	Property type	Picklist	Discount	Percentage	State	Picklist Field	City	Picklist Field		
Field Label	Date Type												
Property type	Picklist												
Discount	Percentage												
State	Picklist Field												
City	Picklist Field												
Rent	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Rent</td><td>Auto Number</td></tr><tr><td>Rental City</td><td>Text</td></tr><tr><td>BHK Type</td><td>Picklist</td></tr></table>	Field Label	Data Type	Rent	Auto Number	Rental City	Text	BHK Type	Picklist				
Field Label	Data Type												
Rent	Auto Number												
Rental City	Text												
BHK Type	Picklist												
Loan	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Loan Id</td><td>Auto Number</td></tr><tr><td>Interest Rate</td><td>Currency</td></tr><tr><td>Term</td><td>Number</td></tr></table>	Field Label	Data Type	Loan Id	Auto Number	Interest Rate	Currency	Term	Number				
Field Label	Data Type												
Loan Id	Auto Number												
Interest Rate	Currency												
Term	Number												

	Annual Income	Number
	Total Loan Instalments	Number
	Loan Repayment	Number
	Loan Amount	Formula

3.2 ACTIVITY & SCREENSHOT

- ❖ First of all we create a New Custom Object example Label name as Buy
Plural name as Buyers.
- ❖ Similarly we created Buy, Rent, Loan objects.

The screenshot shows the Salesforce Setup interface for creating a new custom object. The browser address bar displays the URL: `kngac-6a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page title is "New Custom Object".

Custom Object Definition Edit

Custom Object Information ! Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

- ❖ Next we create a The Lightning App the app name is PROPERTY MANAGEMENT.
- ❖ The Lightning apps users access to set of objects tabs and other items all in one convenient bundle in the navigation bar.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ
Name your app...

* Developer Name ⓘ
Enter a developer name...

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex
Value ⓘ
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's

Next

3	App Launcher	AppLauncher	App Launcher tabs	08/03/2023, 10:50 pm	Classic	✓	▼
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your...	08/03/2023, 10:52 pm	Lightning	✓	▼

- ❖ The Fields is a Two Types
 - Standard Fields
 - Custom Fields
- ❖ We create a Custom Fields name as Lead, Object Buy, Rent, Loan in the fields and relationship.

The screenshot shows the Salesforce Setup interface. The browser address bar displays the URL: `kngac-6a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003EXim/FieldsAndRelationships/new`. The top navigation bar includes links for Setup, Home, and Object Manager. The main content area is titled "New Custom Field" and is part of the "Buy" section. The left sidebar lists various setup options, with "Fields & Relationships" selected. The main form is titled "Step 2. Enter the details" and includes fields for "Field Label", "Length" (set to 18), "Decimal Places" (set to 0), "Field Name", "Description", and "Help Text". A "Previous" button is visible, and a "Next" button is disabled. A "Cancel" button is also present. A "Help for this Page" link is located in the top right corner of the form area.

- ❖ A custom profiles can be deleted if there are no users assigned with that particular one.
- ❖ Create a new profiles standard user, standard platform user, sales manager.
- ❖ Create a Marketing.
 - Marketing Executive
 - Marketing Manager
- ❖ Sales
 - For sales Rep1
 - For sales Rep2
 - For sales Rep3

Buy | Salesforce

Profiles | Salesforce

kngac-6a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

profile

Users

Profiles

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

Profiles

All Profiles Edit Delete Create New View

New Profile

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

1-25 of 50 0 Selected

Page 1 of 2

- ❖ Every user in salesforce has a user account.
- ❖ Create a New User.
- ❖ Fill in the details.

Users | Salesforce

kngac-6a-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2F%3FretURL%3D%252F005%253FisUserEntityOverride%253D1...

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Chat User

Site.com Contributor User

- ❖ They can have multiple permission set.
- ❖ Create a Permission Set and fill the label name.

The screenshot shows the Salesforce Setup interface for creating a new Permission Set. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and 'Create'. It features a form with the following fields:

- Label:** A text input field.
- API Name:** A text input field with a help icon.
- Description:** A larger text input field.
- Session Activation Required:** A checkbox with a help icon.

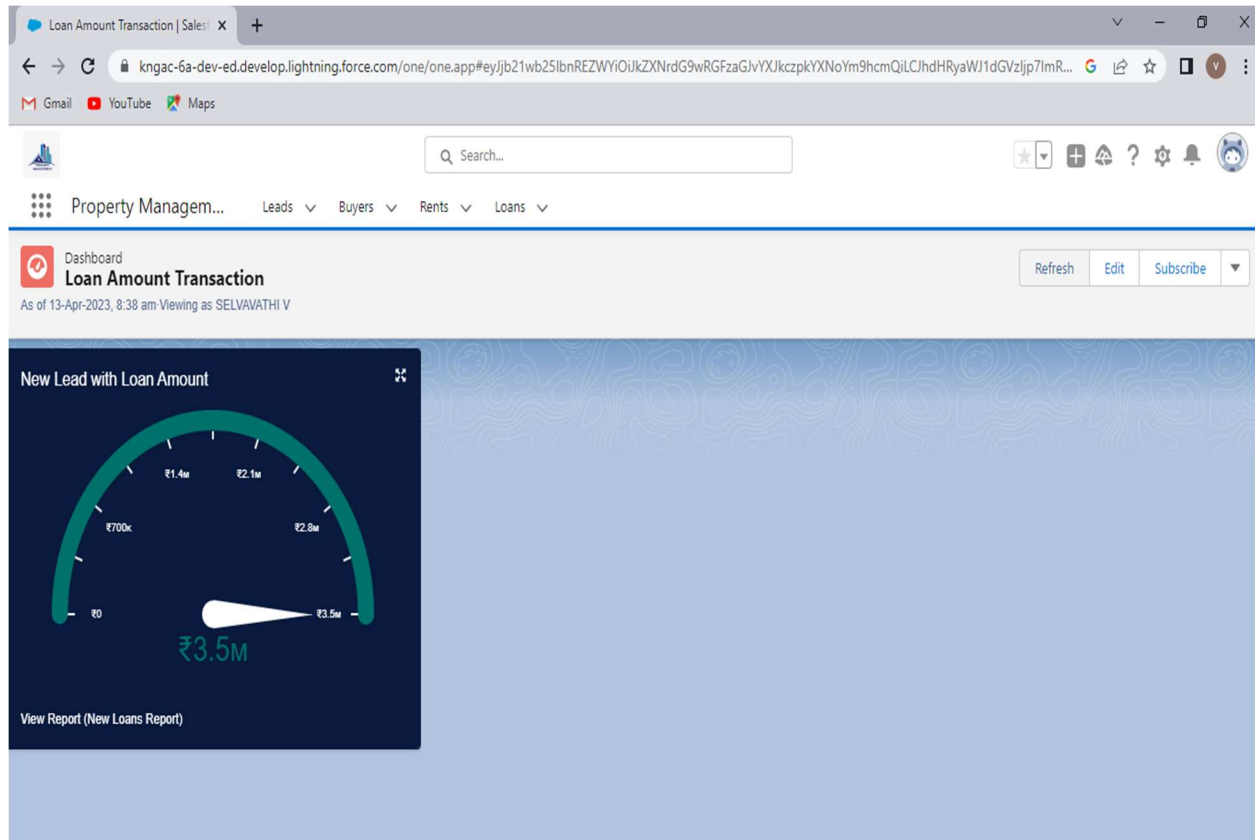
Below the form, there is a section titled 'Select the type of users who will use this permission set' with instructions on how to choose the appropriate user license type.

- ❖ Report give you access to your salesforce data.
- ❖ Next we create a Report for following condition.

The screenshot shows the Salesforce Reports interface. The top navigation bar includes links for Property Management, Leads, Buyers, Rents, and Loans. The main content area displays a report titled 'New Amount Report' with 12 total records. The report table has the following columns:

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	SELVAVATHI V	GenePoint	CA	Customer - Channel	Cold	08/03/2023
2	-	SELVAVATHI V	United Oil & Gas, UK	UK	Customer - Direct	-	08/03/2023
3	-	SELVAVATHI V	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	08/03/2023
4	-	SELVAVATHI V	Edge Communications	TX	Customer - Direct	Hot	08/03/2023
5	-	SELVAVATHI V	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	08/03/2023
6	-	SELVAVATHI V	Pyramid Construction Inc.	-	Customer - Channel	-	08/03/2023
7	-	SELVAVATHI V	Dickenson plc	KS	Customer - Channel	-	08/03/2023
8	-	SELVAVATHI V	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	08/03/2023
9	-	SELVAVATHI V	Express Logistics and Transport	OR	Customer - Channel	Cold	08/03/2023
10	-	SELVAVATHI V	University of Arizona	AZ	Customer - Direct	Warm	08/03/2023
11	-	SELVAVATHI V	United Oil & Gas Corp.	NY	Customer - Direct	Hot	08/03/2023
12	-	SELVAVATHI V	sForce	CA	-	-	08/03/2023

- ❖ Finally we create a Dashboards.
- ❖ Dashboard are used to rank metrics and measure the impact of their activities.
- ❖ The Dashboard enables you to make decisions by visually understanding changing business conditions.



4 TRAIHEAD PROFILE PUBLIC URL

TEAM LEADER – <https://trailblazer.me/id/s2020batch9>

TEAM MEMBER1 – <https://trailblazer.me/id/s2020batch12>

TEAM MEMBER2 – <https://trailblazer.me/id/s2020batch14>

TEAM MEMBER3 – <https://trailblazer.me/id/s2020batch11>

5 ADVANTAGES & DISADVANTAGES

Advantages

- Online Payments
- Financial management
- Tenant applications & tracking
- Easy maintenance monitoring
- Tracking multiple occupancy leases
- Reducing wait times on property maintenance
- Support and customer loyalty
- Scheduling rent increases
- Easy payments from contactors and tenants

Disadvantages

- Might seem expensive for a small business
- Training (cost and time)
- Cost can be prohibition in the beginning
- Time – consuming if you choose the wrong system
- Training this depends as the readiness of your staff to learn

6 APPLICATION

- ✓ Automates communication
- ✓ Automated client and tenants reminder
- ✓ Event planning
- ✓ Telephone systems integration
- ✓ Check in and check out
- ✓ Bookings

7 CONCLUSION

Property Management System (PMS) Software is very crucial for all the hotels especially opera PMS constitutes the most appropriate PMS. The goal of this analysis was to determine which business process elements were critical to the mission of the real property function according to federal law requirements and which business process elements were not critical.

8 FUTURE SCOPE

- ✓ Real estate virtual tour software development, real estate business can better showcase their properties, reduce cost related to physical property tours, and increases sales conversion rates.
- ✓ The trend of using software is projected to grow at an unprecedented rate in the future of property management .
- ✓ The growth is expected since the pandemic has catalysed tech startups that specialize in property management solutions.