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.

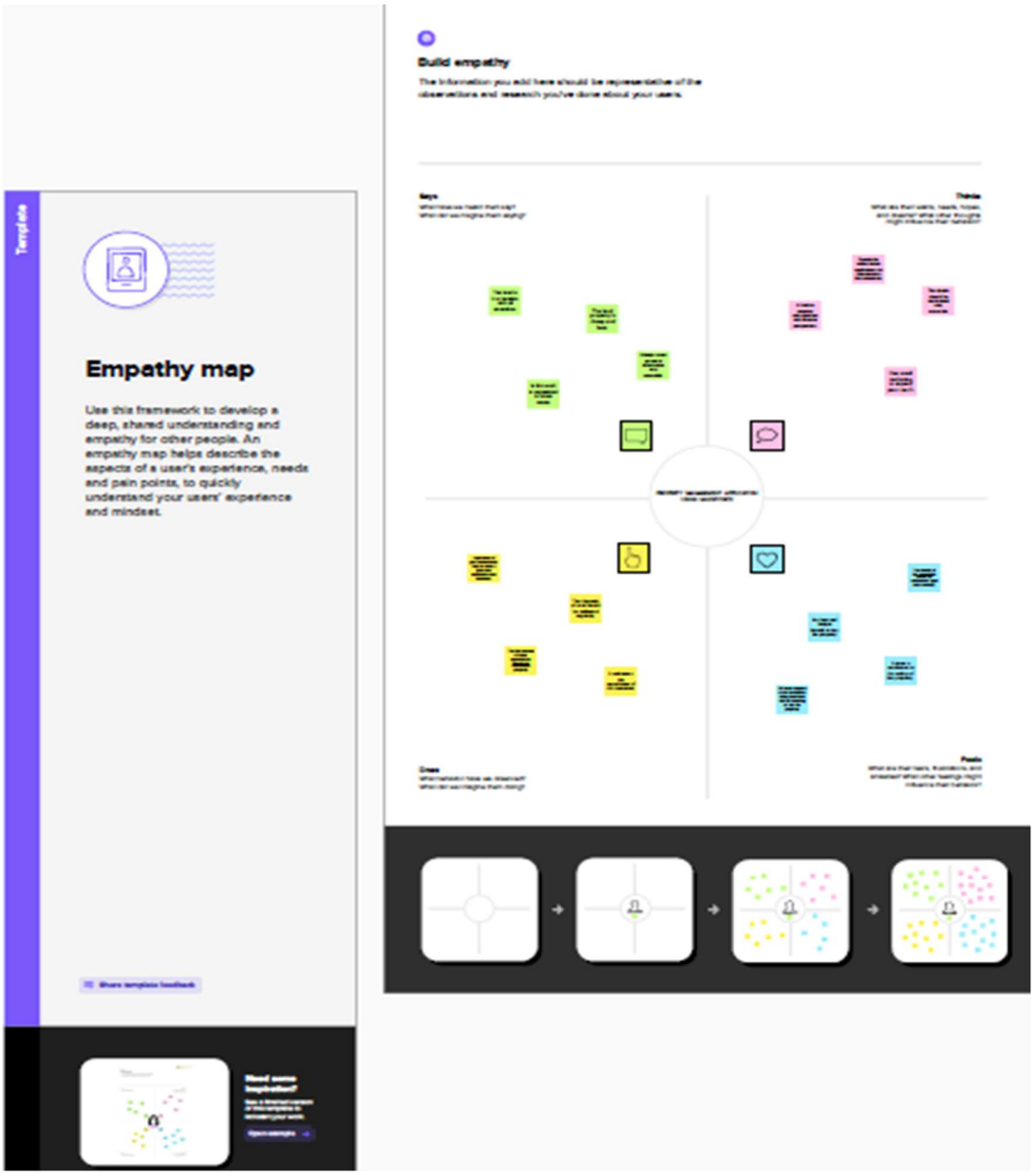
1. In this we create developer account and sign it and then login to our salesforce account.
2. In this we create object names and we can save all objects namely Buy, Rent and Loan.
3. In this we build records for objects and then select tap and tap style for all objects.
4. In this we create app namely 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

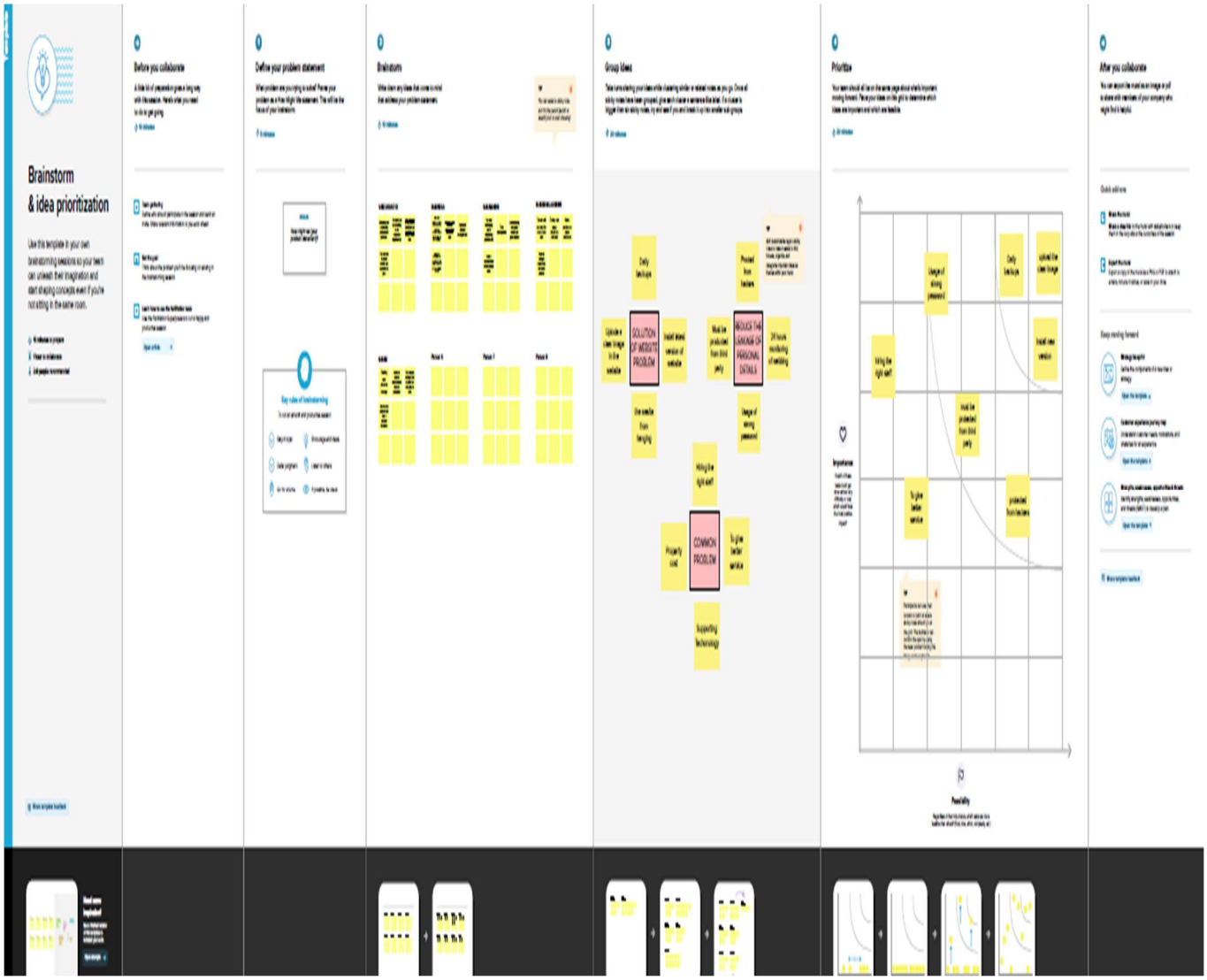
- Enhance communication and collaboration tools.
- Centralize management of all tenure contracts, units and other data.
- The use of a property management system helps you to keep details, records and information forever.
- A management system, you do not have to be present at all times to manage your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



RESULT

3.1 DATA MODEL

<table>
<tr><th>Object Name</th><th>Fields in the Object</th></tr>
<tr><td>Lead</td><td>
<table>
<tr><td>Field Label</td><td>Data Type</td></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>
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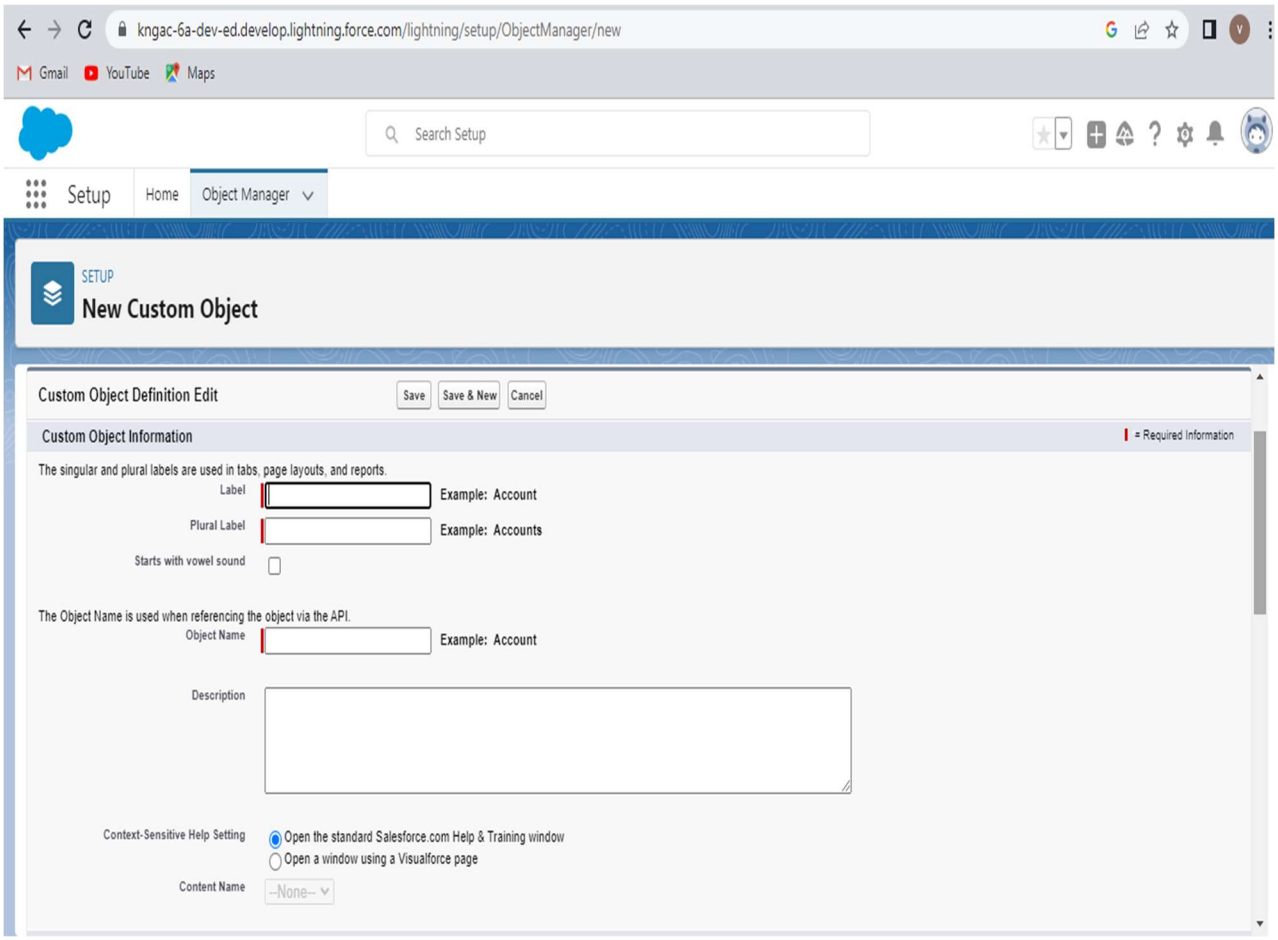
</td></tr>
<tr><td>Buy</td><td>
<table>
<tr><td>Field Label</td><td>Date Type</td></tr>
<tr><td>Property type</td><td>Picklist</td></tr>
<tr><td>Discount</td><td>Percentage</td></tr>
<tr><td>State</td><td>Picklist Field</td></tr>
<tr><td>City</td><td>Picklist Field</td></tr>
</table>
</td></tr>
<tr><td>Rent</td><td>
<table>
<tr><td>Field Label</td><td>Data Type</td></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>
</td></tr>
<tr><td>Loan</td><td>
<table>
<tr><td>Field Label</td><td>Data Type</td></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>
</td></tr>
</table>

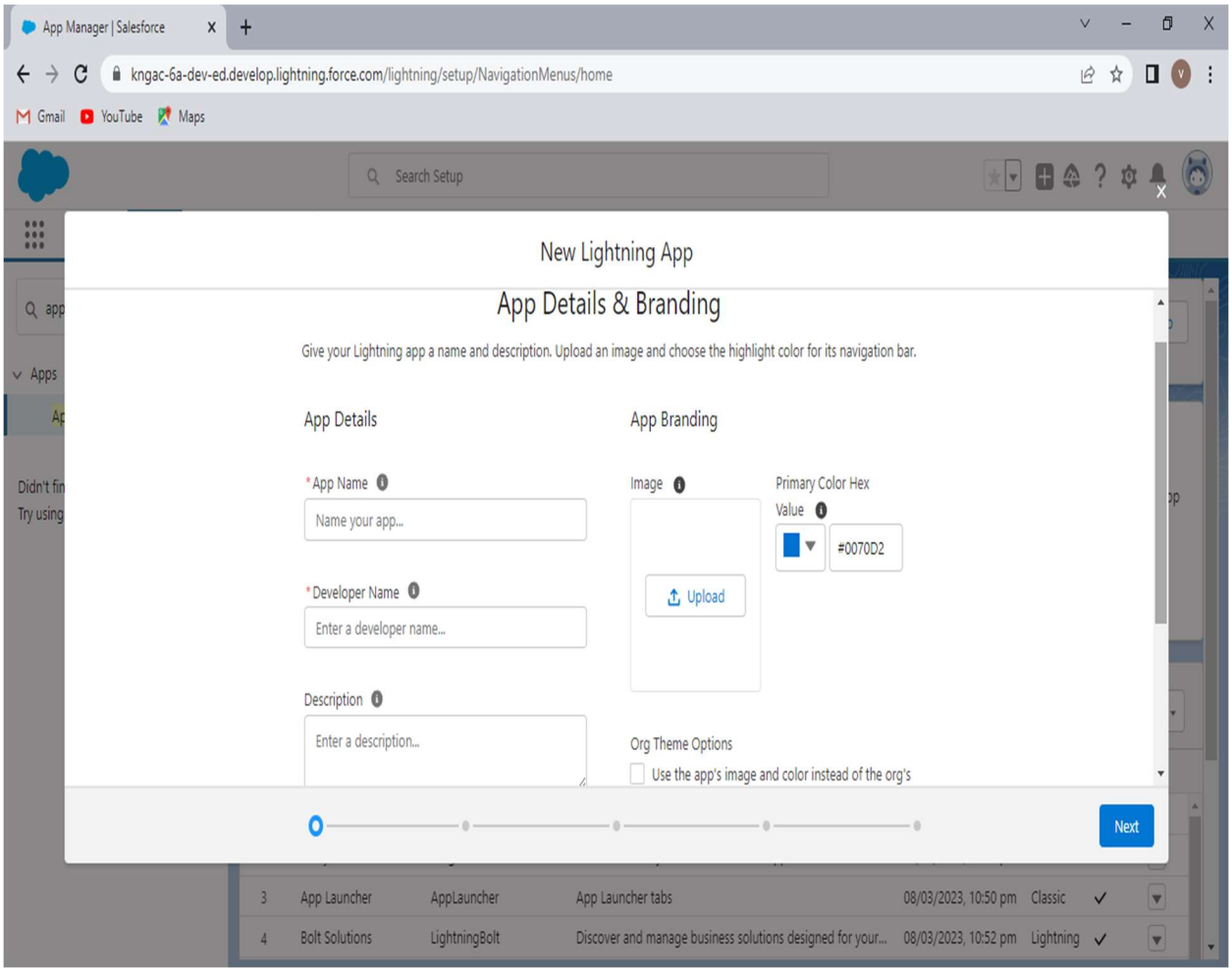
	Annual Income	Number
	Total Loan Instalments	Number
	Loan Repayment	Number
	Loan Amount	Formula

3.2 ACTIVITY & SCREENSHOT

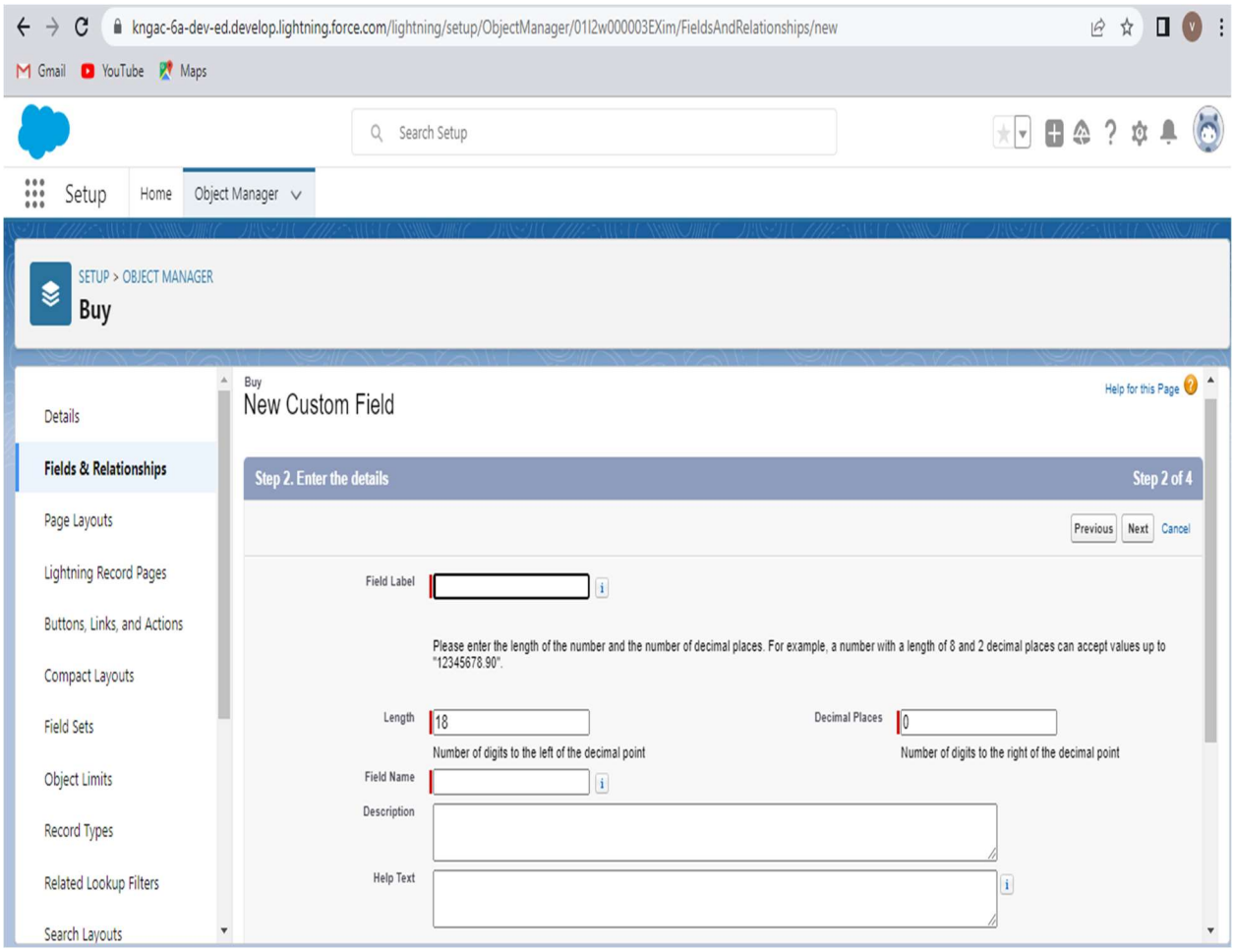
- First of all we create a New Custom Object example Label name as Buy Plural name as Buyers.
- Similarly we created Buy, Rent, Loan objects.



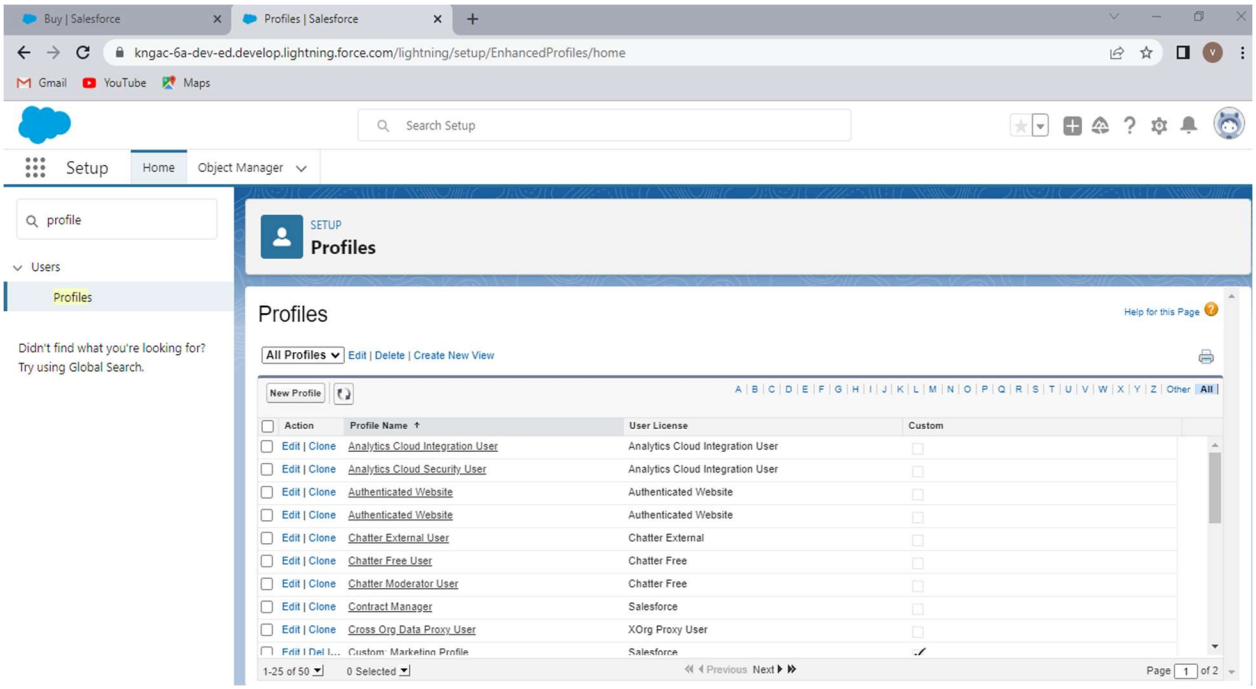
- Next we create a The Lightning App the app name is PROPERTY MANAGEMENT.
- The Lightning apps users access to set of objects tabs and other items all in one convenient bundle in the navigation bar.



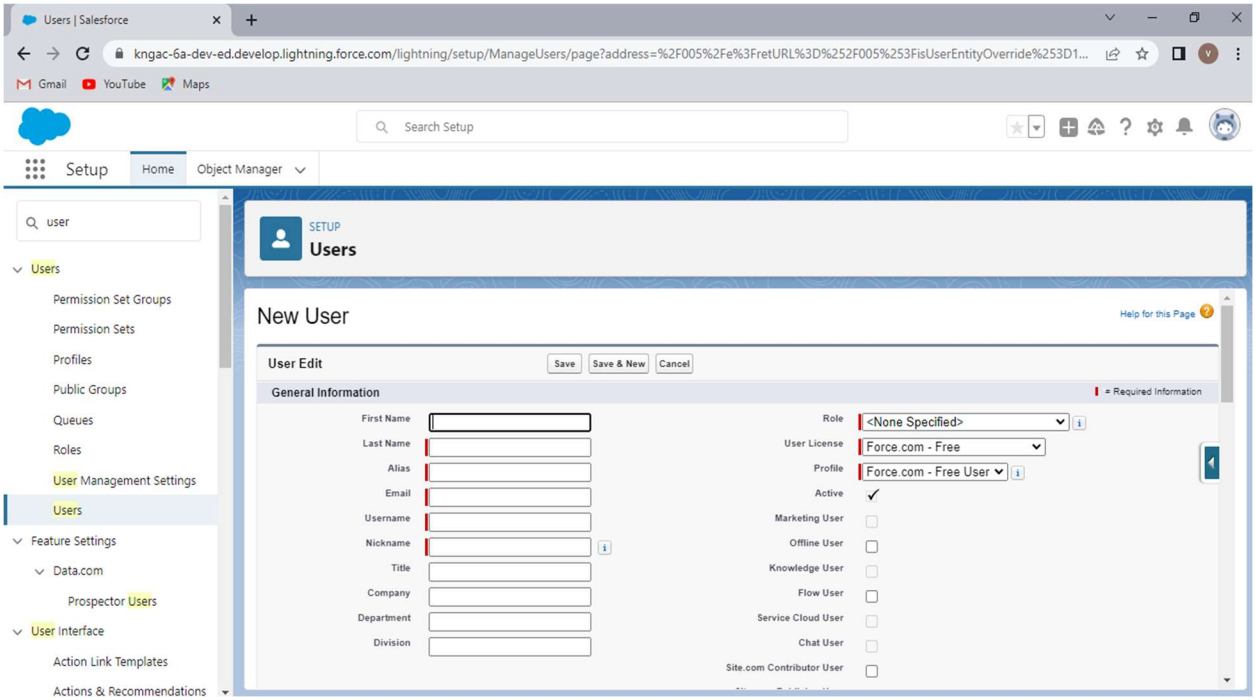
- The Fields is a Two Types
    - Standard Fields
    - Custom Fields
- We create a Custom Fields name as Lead, Object Buy, Rent, Loan in the fields and relationship.



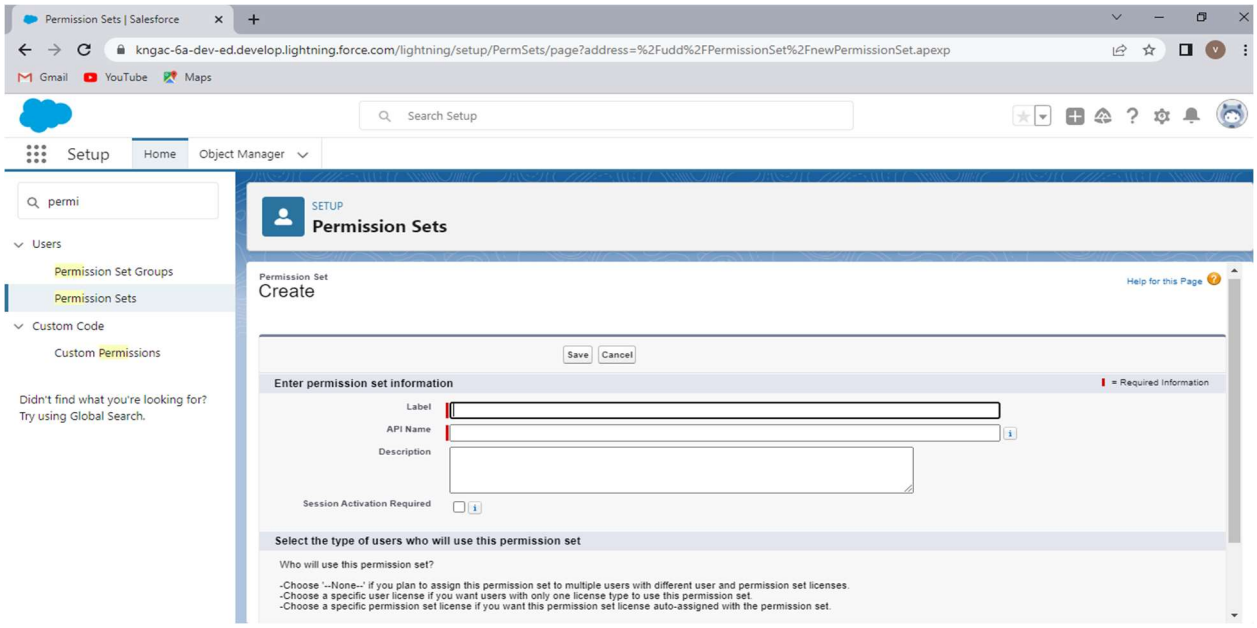
- A custom profiles can be deleted if there are no users assigned with that particular one.
- Create a new profiles standard user, standard platform user, sales manager.
- Create a Marketing.
    - Marketing Executive
    - Marketing Manager
- Sales
    - For sales Rep1
    - For sales Rep2
    - For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



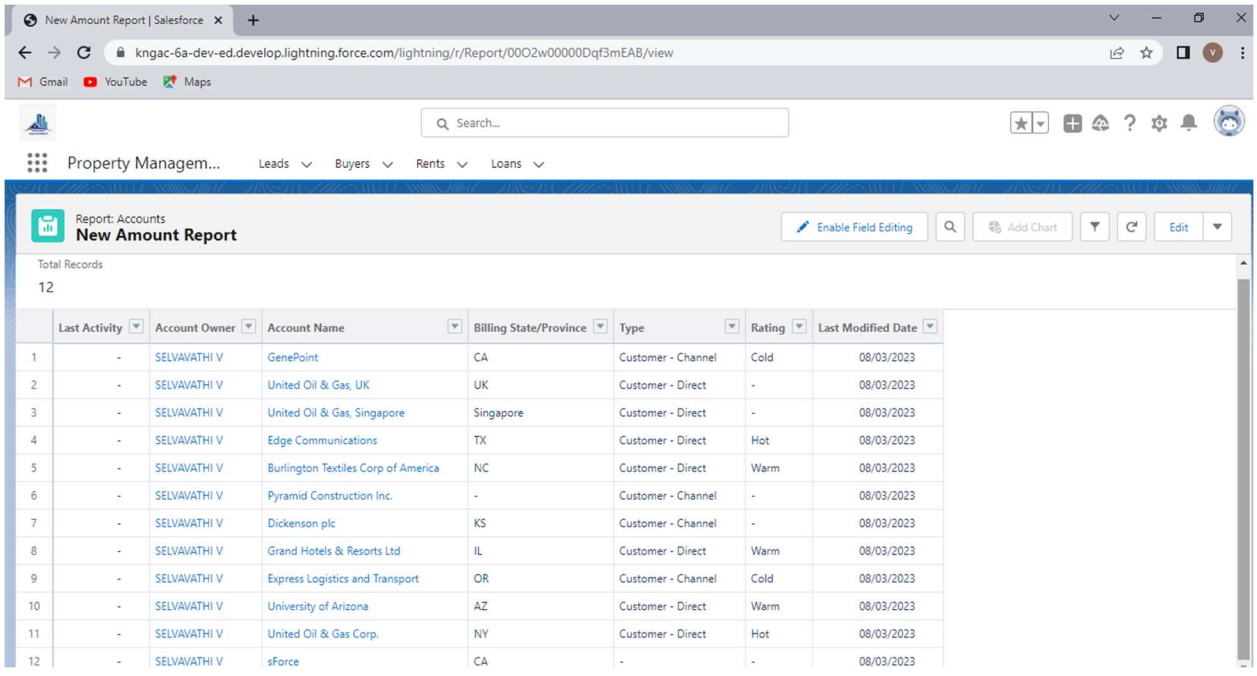
- Every user in salesforce has a user account.
- Create a New User.
- Fill in the details.



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

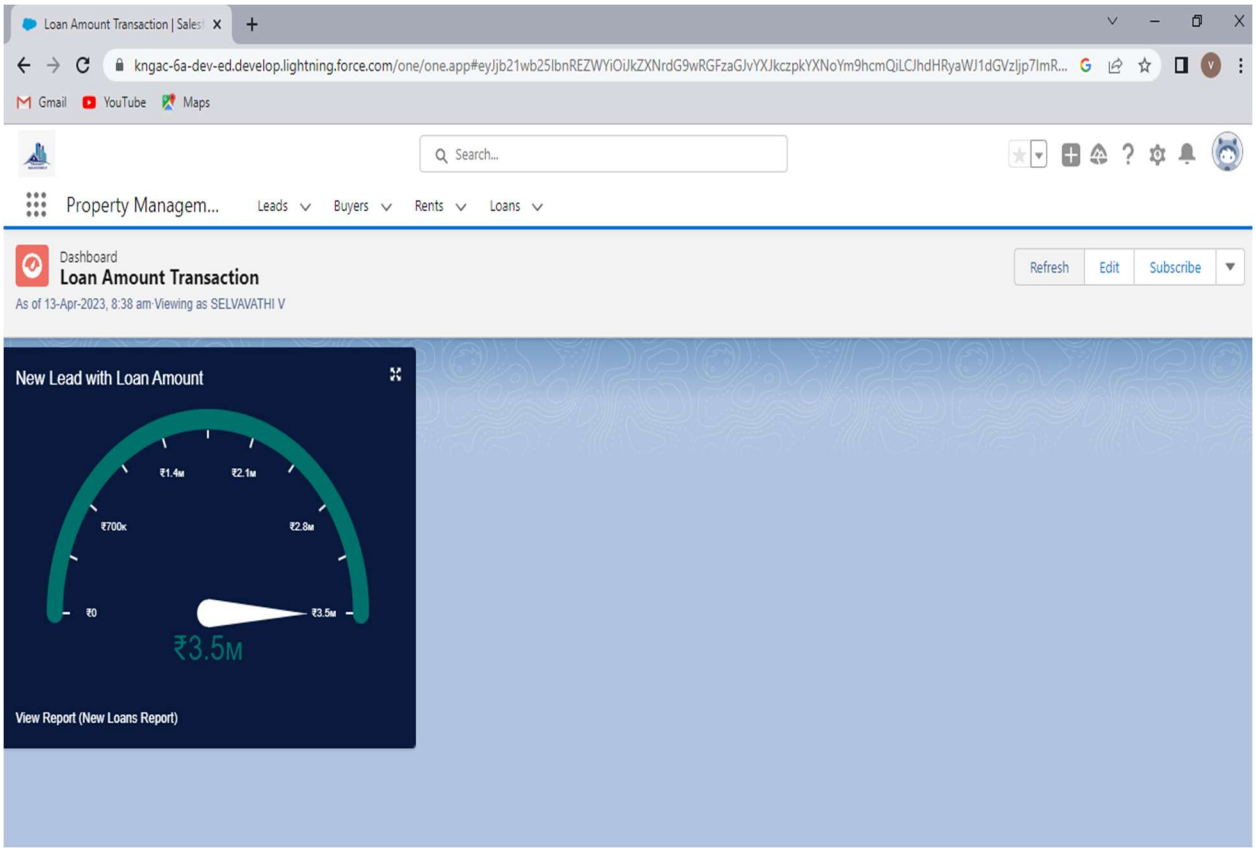


- Report give you access to your salesforce data.
- Next we create a Report for following condition.



	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

TEAM MEMBER4 – https://traiblazer.me/id/s2020batch10

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.