

PROPERTY MANAGEMENT USING SALESFORCE

1. INTRODUCTION

1.1 OVER VIEW

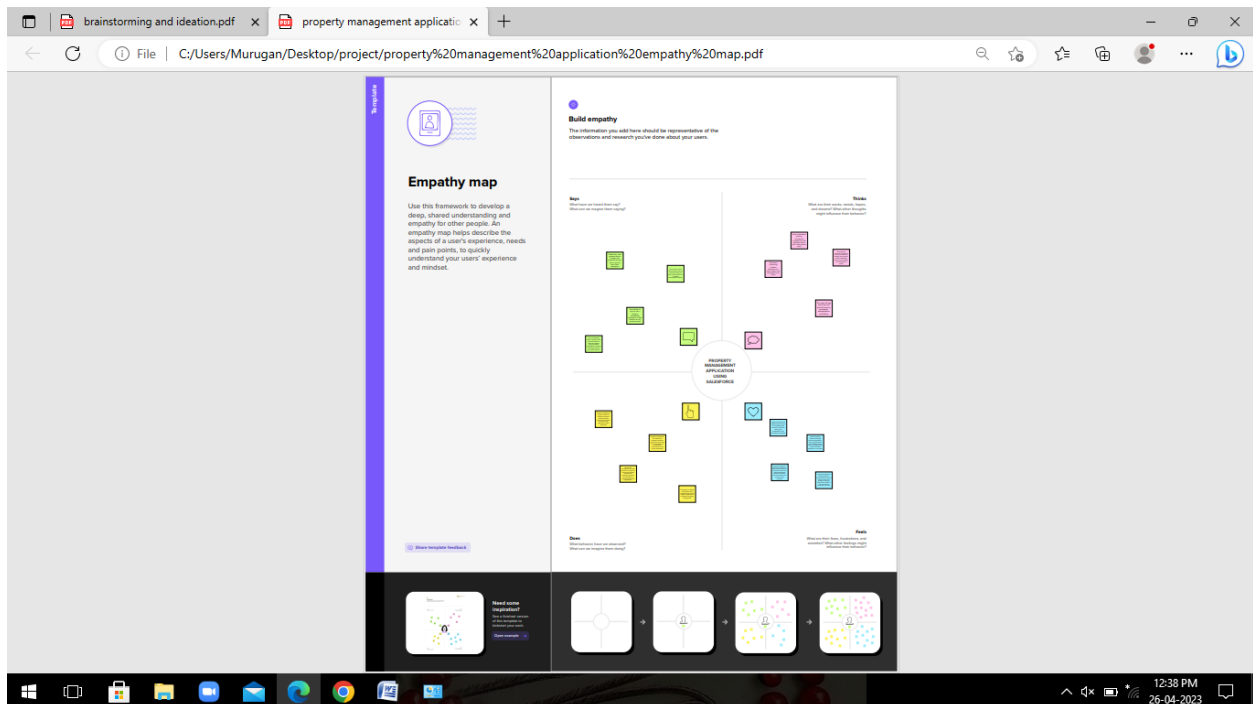
A property manager is a professional or a company that oversees the daily responsibilities of a property. Managers work on behalf of owners of investment.

1.2 PURPOSE

Property managers assist owners in creating budgets, advertise rental properties qualify tenants and collect rents.

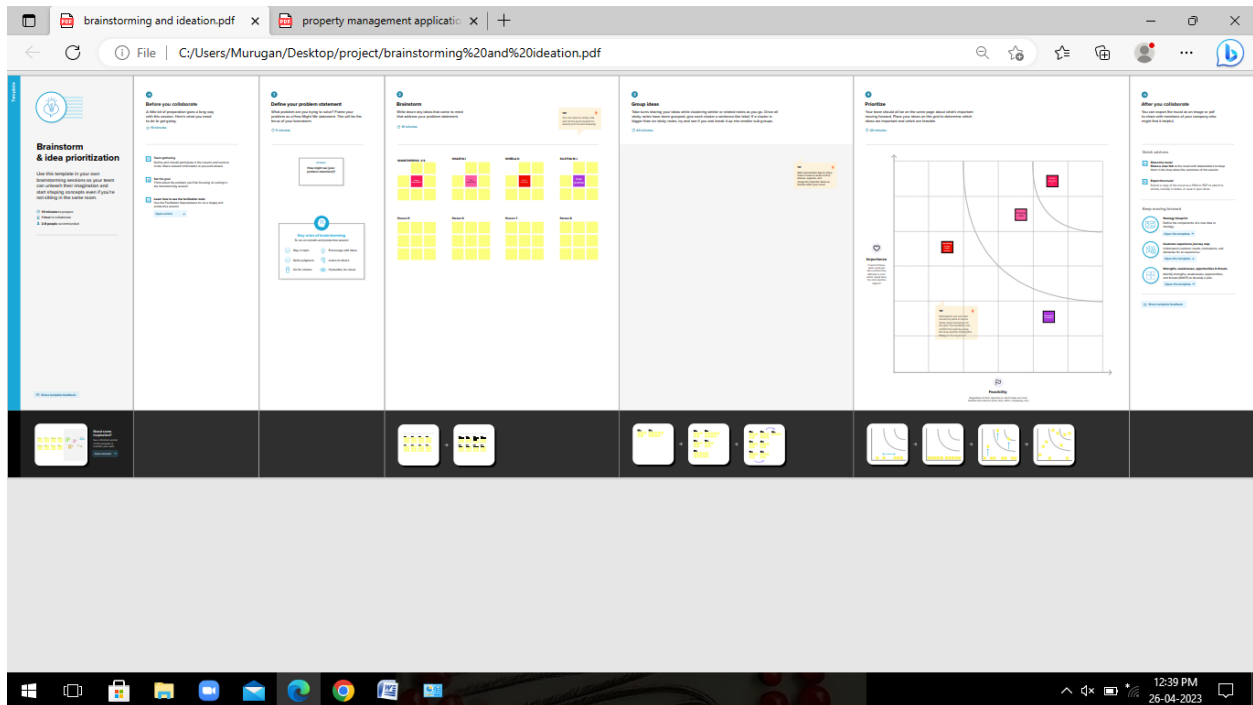
2. PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



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2.2 IDEATION AND BRAINSTORMING



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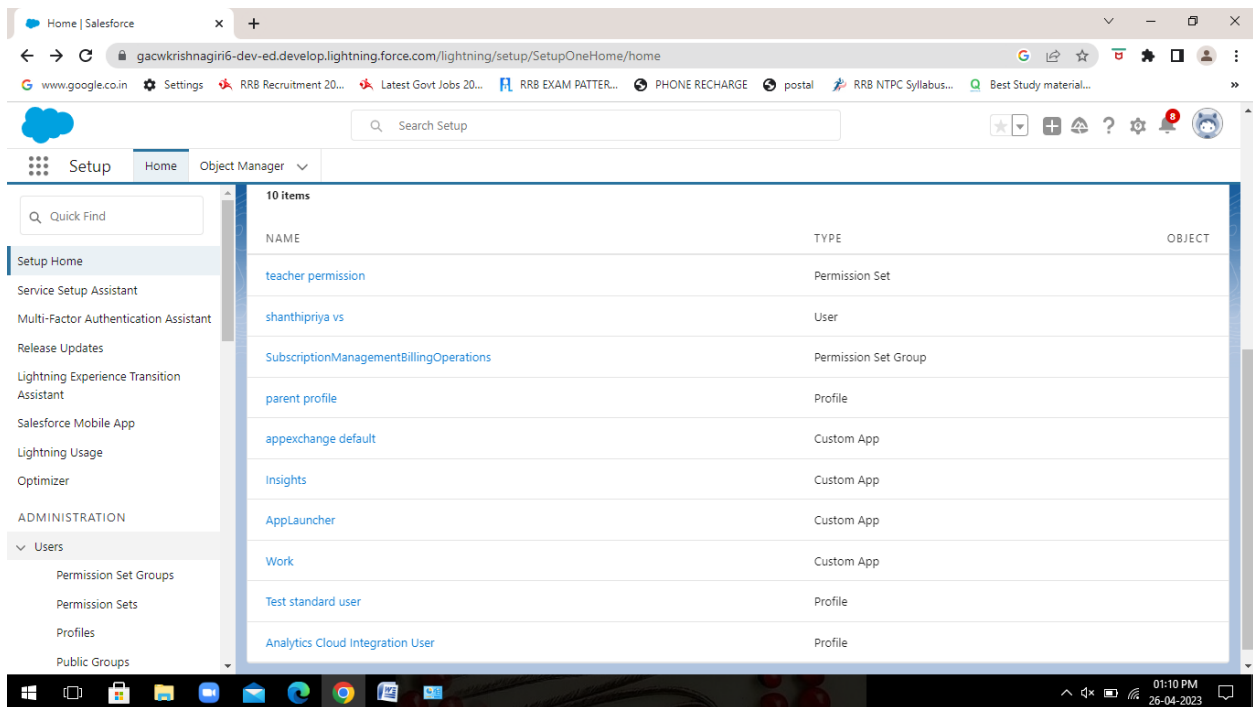
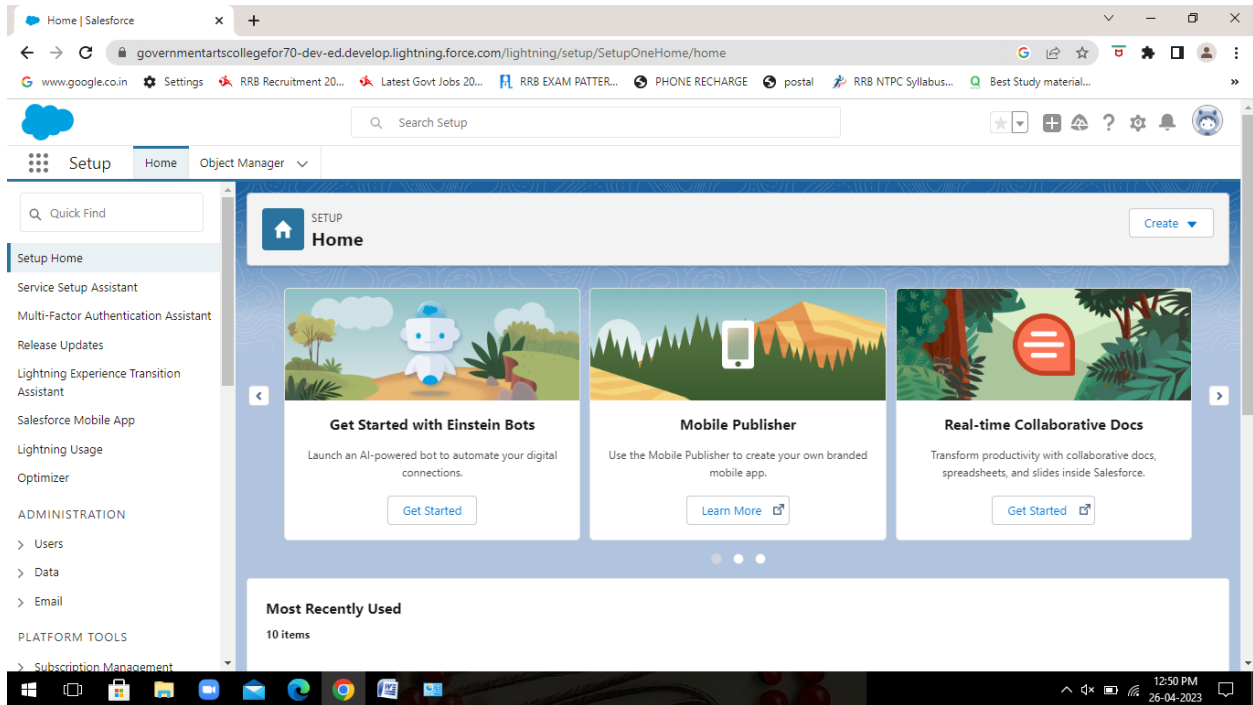
3. RESULT

3.1 DATA MODEL

OBJECT	FIELDS IN THE OBJECT	
LEAD	FIELD LABEL	DATA TYPE
	Lead	Auto Number
	State	Picklist
	City	Picklist
	Email	Email
	Phone	Phone
BUY	FIELD LABEL	DATA TYPE
	Property type	Picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
RENT	FIELD LABEL	DATA TYPE
	Rent	Auto tab
	Rental city	Text
	BHK Type	Picklist
LOAN	FIELD LABEL	DATA TYPE
	Loan ID	Auto number
	Interest Rate	Currency
	Term annual loan amount	Field
	Loan instalments loan	Number
	Repayment	Number
	Loan Amount	Formula

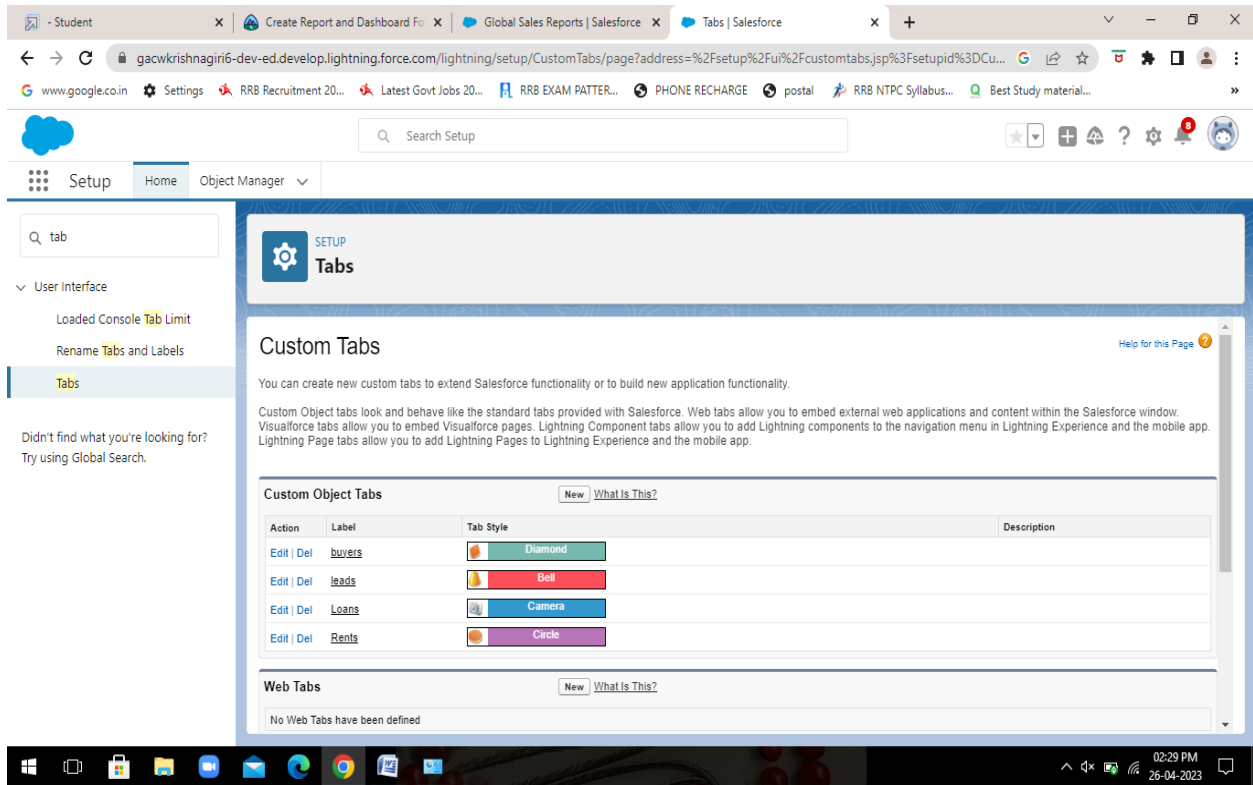
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3.2 ACTIVITY AND SCREENSHOT



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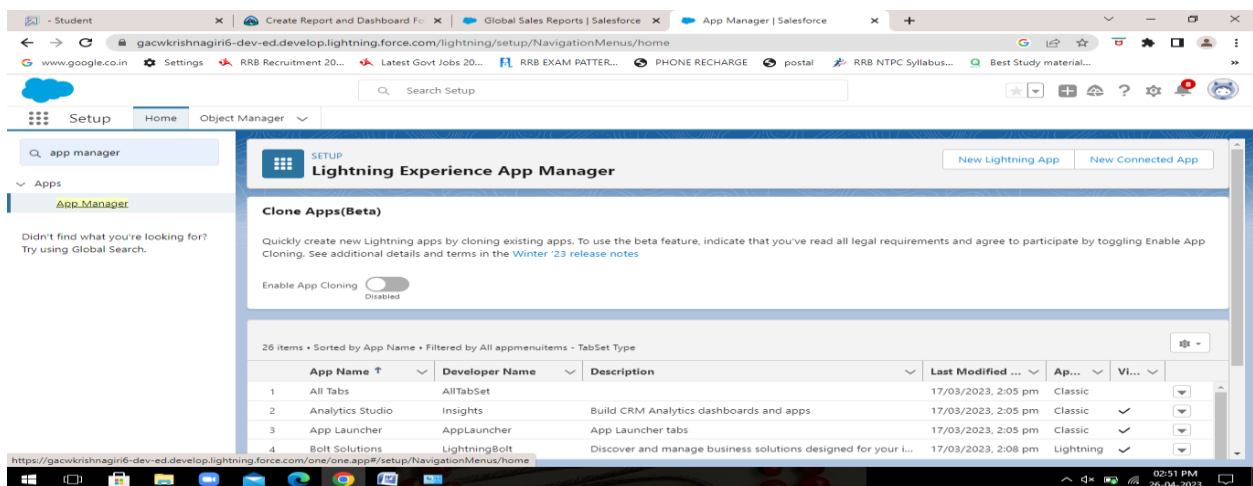
1. CREATED OBJECTS (BUY, RENT ,LOAN AND LEAD)



The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar has a search bar with 'tab' entered and a list of categories including 'User Interface'. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a paragraph explaining custom tabs and their types: Custom Object tabs, Visualforce tabs, and Lightning Page tabs. A table titled 'Custom Object Tabs' lists four tabs: 'buyers' (Diamond style), 'leads' (Bell style), 'Loans' (Camera style), and 'Rents' (Circle style). Each row has 'Edit' and 'Del' links. Below the table, there is a 'Web Tabs' section with a 'New' button and a 'What Is This?' link. The status 'No Web Tabs have been defined' is shown.

Action	Label	Tab Style	Description
Edit Del	buyers	Diamond	
Edit Del	leads	Bell	
Edit Del	Loans	Camera	
Edit Del	Rents	Circle	

2. LIGHTENING APP



The screenshot shows the Salesforce Setup interface for the Lightning Experience App Manager. The left sidebar has a search bar with 'app manager' entered and a list of categories including 'Apps'. The main content area is titled 'Lightning Experience App Manager' and includes a 'New Lightning App' button and a 'New Connected App' button. Below the title, there is a section for 'Clone Apps(Beta)' with a paragraph explaining the feature and a toggle switch for 'Enable App Cloning' which is currently 'Disabled'. Below this, there is a table listing 26 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The first four items are: 'All Tabs' (AllTabSet), 'Analytics Studio' (Insights), 'App Launcher' (AppLauncher), and 'Bolt Solutions' (LightningBolt).

App Name	Developer Name	Description	Last Modified	App...	VL...
1 All Tabs	AllTabSet		17/03/2023, 2:05 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	17/03/2023, 2:05 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	17/03/2023, 2:05 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	17/03/2023, 2:08 pm	Lightning	✓

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3. FIELD AND RELATIONSHIP

The screenshot shows the Salesforce Setup interface for the 'buy' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the 'buy' object, sorted by field label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Buy	Buy__c	Picklist		
buy Name	Name	Text(80)		✓
city	city__c	Picklist		
Created By	CreatedById	Lookup(User)		
discount	discount__c	Percent(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓

4. PROFILES

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar lists various setup options, with 'Profiles' selected. The main content area displays the details for the 'Test standard user' profile. The profile is a custom profile with the following details:

- Name:** Test standard user
- User License:** Analytics Cloud Integration User
- Description:** Not Assigned
- Created By:** Shanthipriya Vs. 20/04/2023, 9:45 pm
- Modified By:** Shanthipriya Vs. 20/04/2023, 9:45 pm

The 'Page Layouts' section shows the following assignments:

- Standard Object Layouts:** Global (Global Layout [View Assignment])
- Email Application:** Not Assigned [View Assignment]
- Object Milestone:** Object Milestone Layout [View Assignment]
- Operating Hours:** Operating Hours Layout [View Assignment]

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5. USERS

The screenshot shows the Salesforce 'Users' page in the Setup menu. The left sidebar contains navigation options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'All Users' and includes instructions on how to create, view, and manage users. Below the instructions, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A table lists existing users with columns for Action, Full Name, Alias, Username, Role, and Profile. The table includes users like 'Chatter Expert', 'User Integration', 'User Security', 'Va Shanthidriya', and 'va shanthidriya'. The bottom of the page shows the URL 'https://gacwkrishnagiri6-dev-ed.develop.lightning.force.com/one/one.app#/setup/ManageUsers/home' and the system time '02:55 PM 26-04-2023'.

Action	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000roqu6eaj.kondhirdi26@chatter.salesforce.com		✓ Chatter Free User
<input type="checkbox"/> Edit	User Integration	intep	integration@00d2w00000roqu6eaj.com		✓ Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2w00000roqu6eaj.com		✓ Analytics Cloud Security User
<input type="checkbox"/> Edit	Va Shanthidriya	SVa	shanthipacw@college.com		✓ System Administrator
<input type="checkbox"/> Edit	va shanthidriya	va	gvindaraj@gmail.com	SVP_Sales & Marketing	✓ Standard Platform User

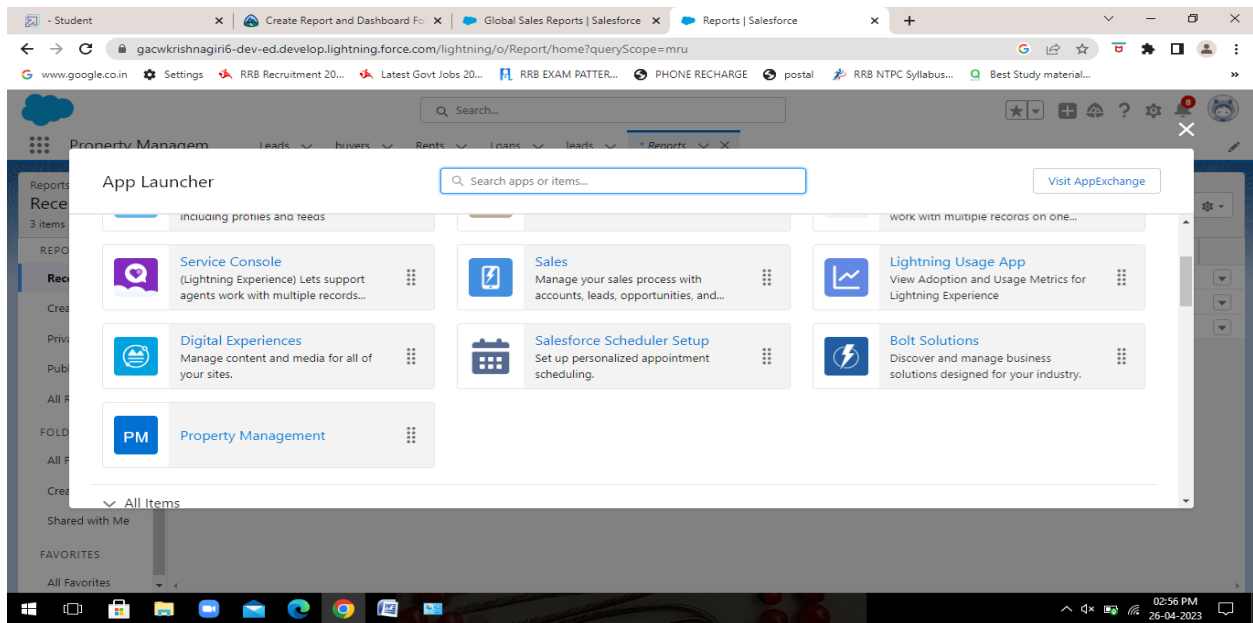
6. PERMISSION SETS

The screenshot shows the Salesforce 'Permission Sets' page in the Setup menu. The left sidebar contains navigation options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Permission Sets' and includes instructions on how to create, view, and manage permission sets. Below the instructions, there are buttons for 'New', 'Clone', 'Delete', and 'Create New View'. A table lists existing permission sets with columns for Action, Permission Set Label, Description, and License. The table includes permission sets like 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', and 'Contact Center Supervisor'. The bottom of the page shows the URL 'https://gacwkrishnagiri6-dev-ed.develop.lightning.force.com/one/one.app#/setup/PermSets/home' and the system time '02:55 PM 26-04-2023'.

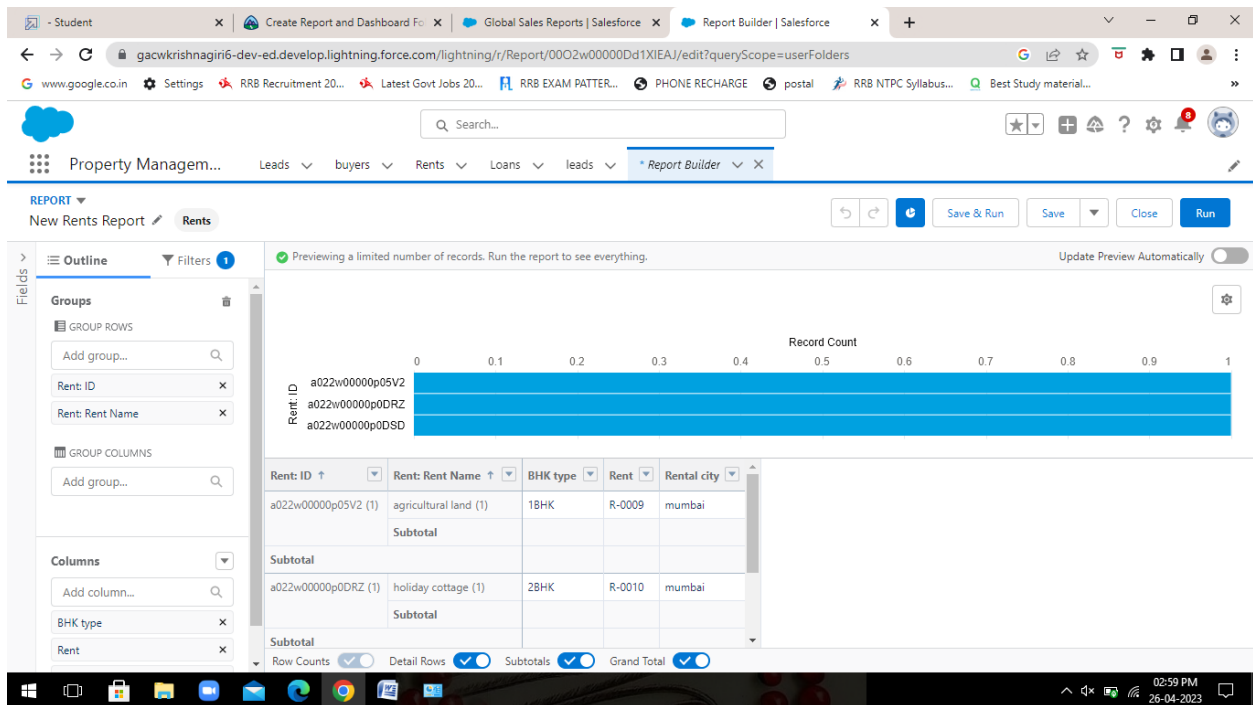
Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager 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

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7. APP LAUNCHER

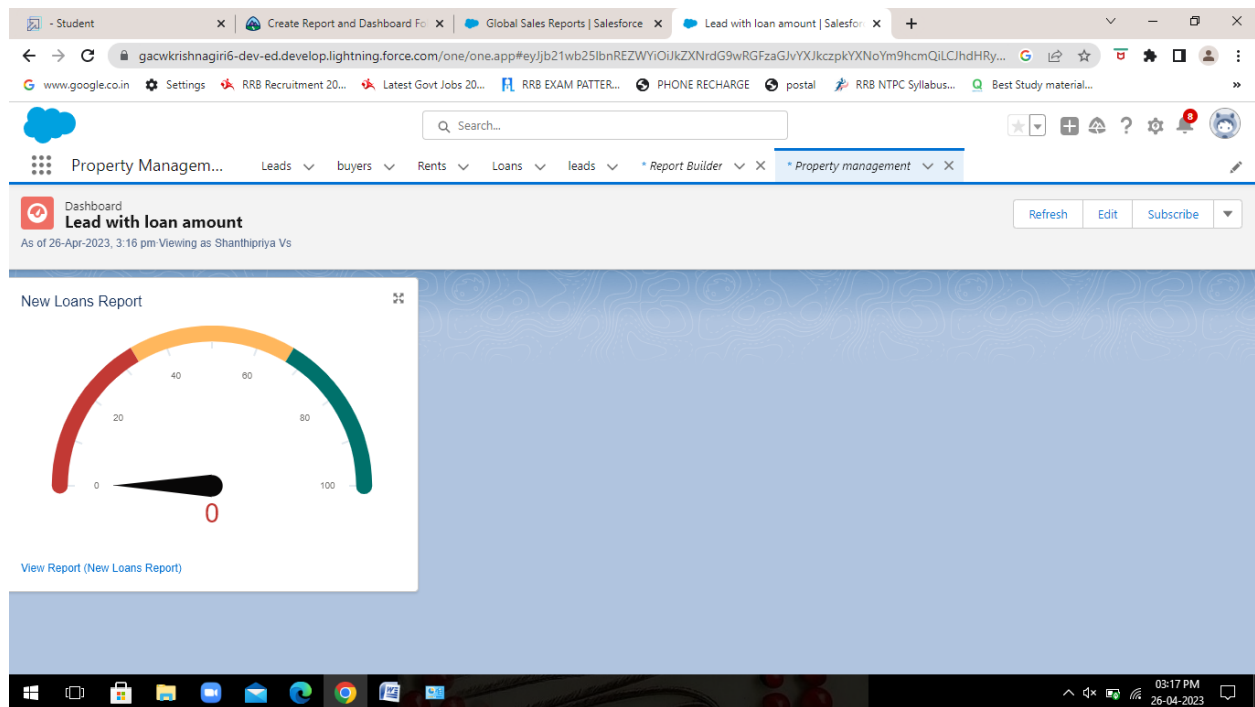


8. REPORTS



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9. DASHBOARD



4. TRAILHEAD PROFILE PUBLIC URL

TEAM LEAD: <https://trailblazer.me/id/shanthipriya12>

TEAM MEMBER 1: <https://trailblazer.me/id/sirfanbasha>

TEAM MEMBER 2: <https://trailblazer.me/id/sdurai48>

TEAM MEMBER 3: <https://trailblazer.me/id/smurugan105>

5. ADVANTAGES AND DISADVANTAGES

ADVANTAGES

- Real time reports and dashboards.
- Streamline lead, opportunity, and contact management simplify document management and data sharing.
- Enhance communication and collaboration tools.
- Have reminders and notifications of important events emails and calls.
- Synchronize calendar task management system and email services with the CRM.
- Integrate digital advertising with the client management system.
- Centralize management of all tenure contracts units and other data

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DISADVANTAGE

- EXPENSIVE
- INVOLVE

Property managers likely own involve you for minor tenant issues, maintenance issues or other trivial matters. This is because they are equipped to handle these issues and have learn the best way to do so.

6. APPLICATIONS

1. RESIDENTAL PROPERTY MANAGEMENT

- Single family homes
- Vacation rentals
- Multifamily homes
- Town homes
- Apartments

2. COMMERCIAL PROPERTY MANAGERMENTS

- Hotels
- Malls
- Restaurents
- Gas stations
- Office properties

3. INDUSTRIAL PROPERTY MANAGEMENT

- Automotive plants
- Steel mills
- Food packaging
- Distribution facilities

4. SPECIAL PURPOSE PROPERTY MANAGEMENT

- Schools and universities
- Resorts
- Theaters
- Sport eranas

7. CONCLUSION

In this property management we can make the understanding reports for buyers loans rents.

In this creating the object and then adding the particular fields for the objects.

We can make the list of users and creating the profiles and give the permission sets, making reports and creating the dashboards.

We can create and maintain a proper detailed records.

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8. FUTURE SCOPE

1. The cost of the housing will keep rising.
2. Use of clouds.
3. Security.
4. Rental apps.
5. Smart home apps and devices.