

Project report

Introduction

Overview 1.1

In general property management includes tenant placement maintenance and repairs and the ongoing administration of real property. property management involves the process, systems, and workforce required to manage the life cycle of all acquired property as defined above, including acquisition, control, utilization, disposition.

Property management system is software that take cares of everything that a real estate company wants to do. Property management system is developed for real estate companies. It is very strong and easy to use that makes quick booking and account handling process.

Purpose 1.2

This system is used to keep the details and records and information forever. It gives a clear view of what is going on your business and provides simple steps that your team can easily follow to help grow your business.

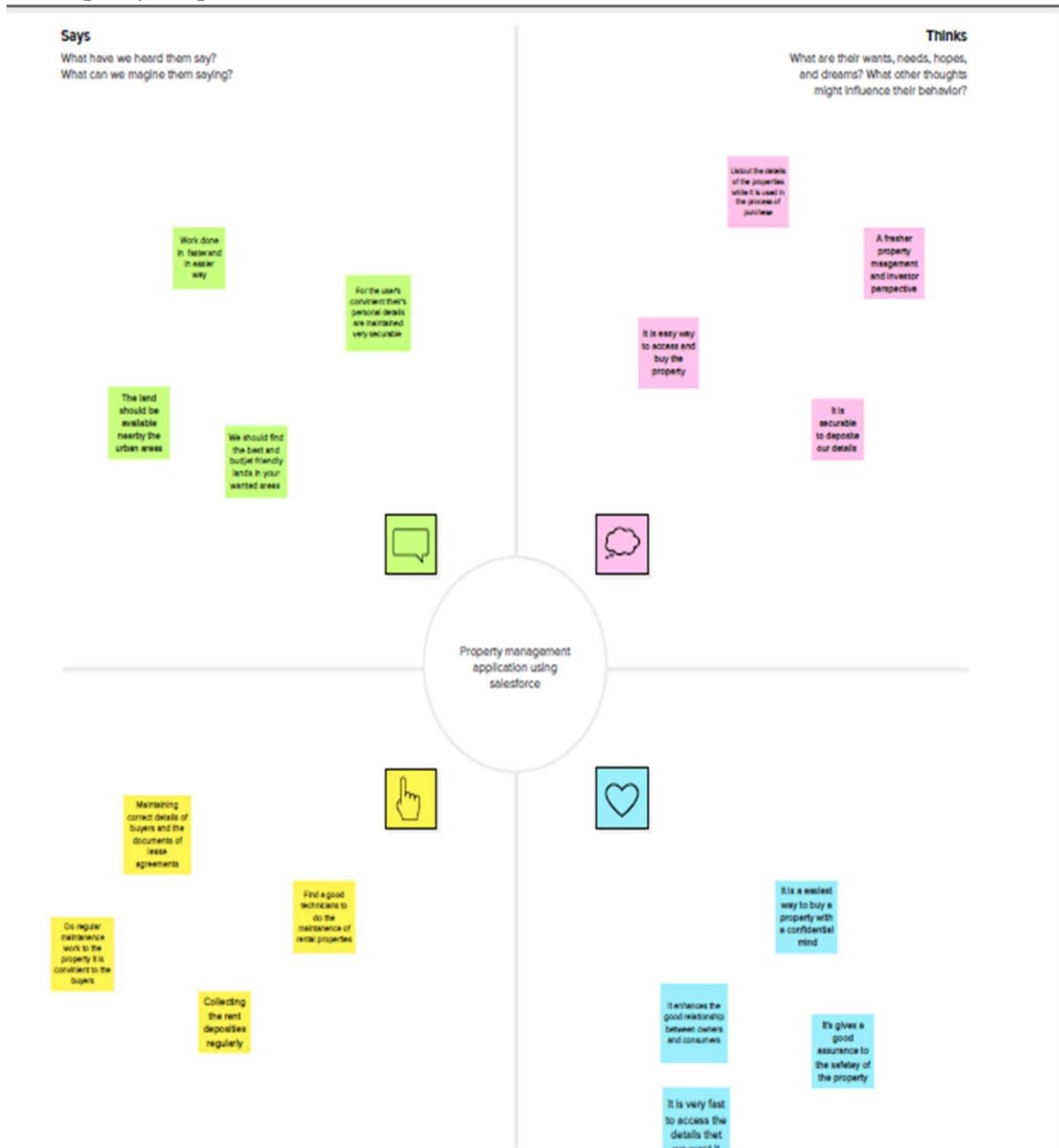
Property management assist owners in creating budgets, advertise rental properties, qualify tenants , and collect rent. They also comply with the local landlord and real estate board laws and maintain the property.

Many times, there is a need to access or evaluate a property from some other place /city. With a management system ,you do not have to be present at all times to manage your property.

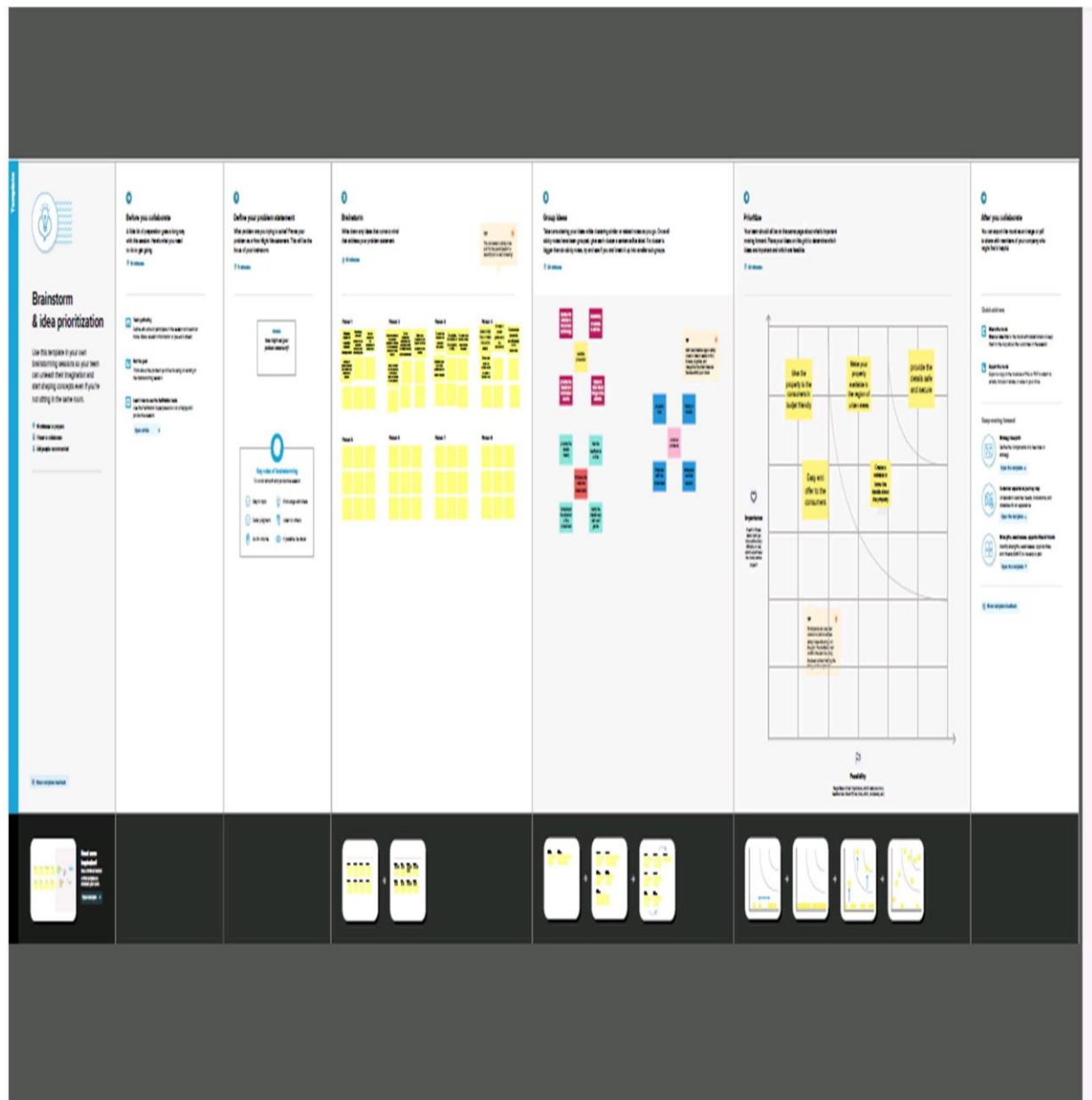
Payments can even be made via the property management system. With paperwork, practically everyone and anyone can have access to sensitive information and detail

Problem definition and design thinking

Empathy map 2.1



Ideation & Brainstroming map:2.2



Result

Date model :3.3

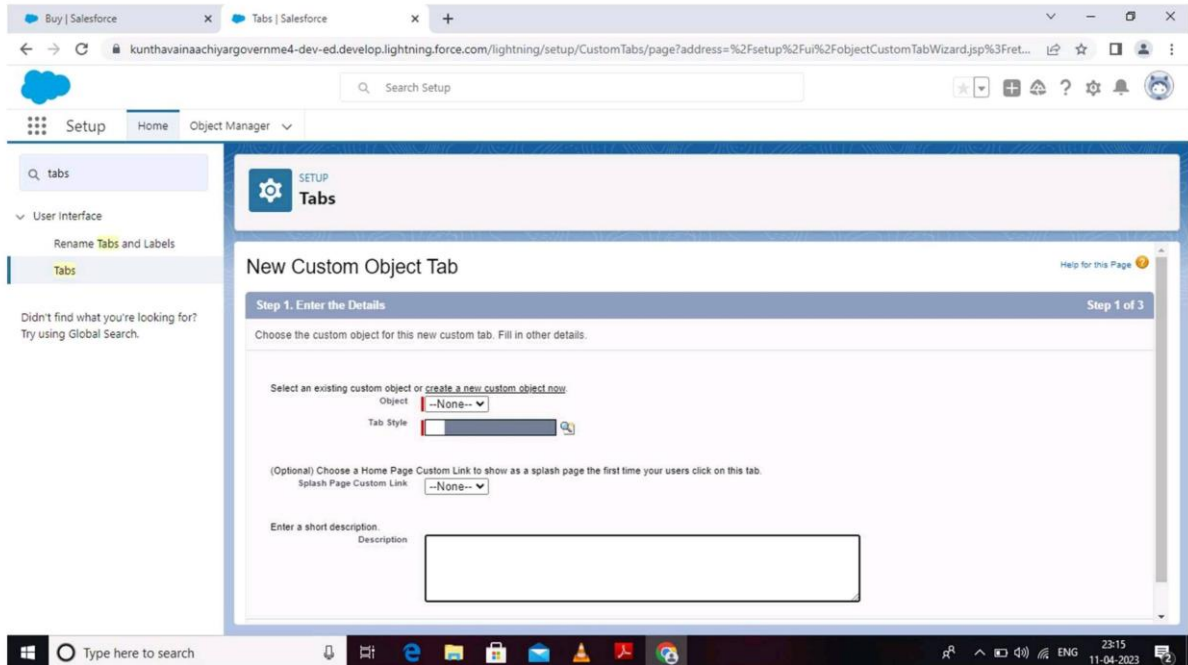
Object name	Fields in the object	
Lead	Field label	Data type
	Lead	Auto number
	City	Picklist
	Email	Email
	Phone	Phone
Buy	Field label	Data type
	Property type	picklist
	Discount	Percentage
	State	Picklist
	City	Picklist
Rent	Field label	Data type
	Rent	Autonumber
	Rental city	Text
	BHK type	Picklist
Loan	Field label	Data type
	Loan id	Auto number
	Interest rate	Currency
	Term	Number
	Annual income	Number
	Total loan installments	Number
	Loan repayment	Number
	Loan amount	Formula

Activity & screen shots :3.2

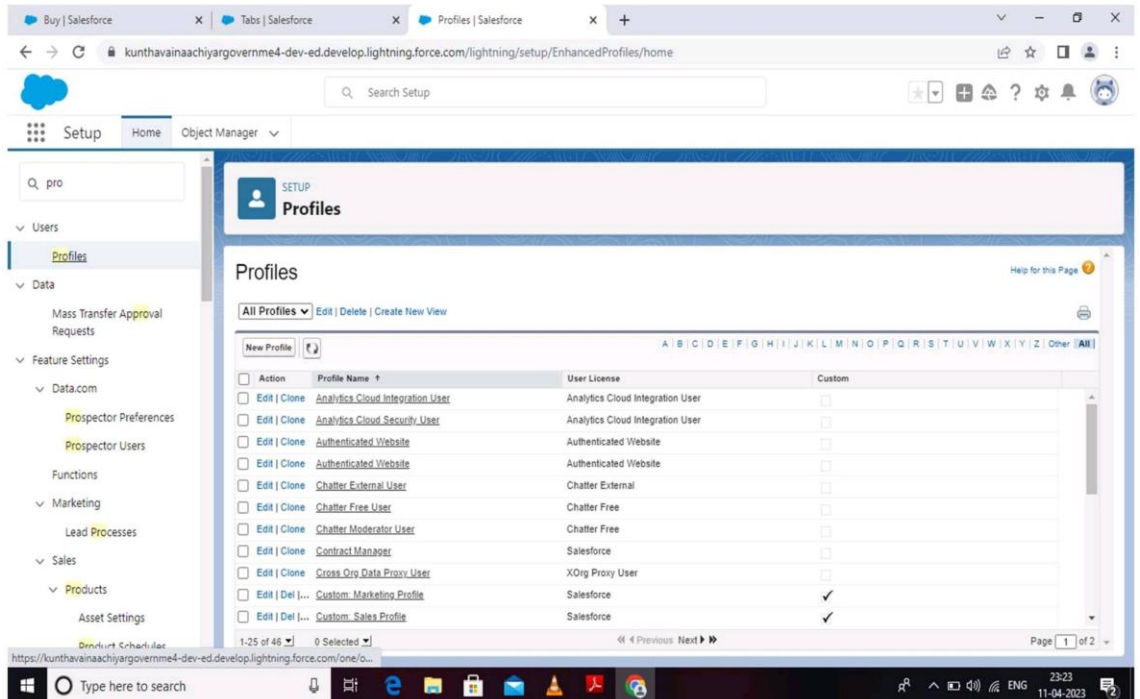
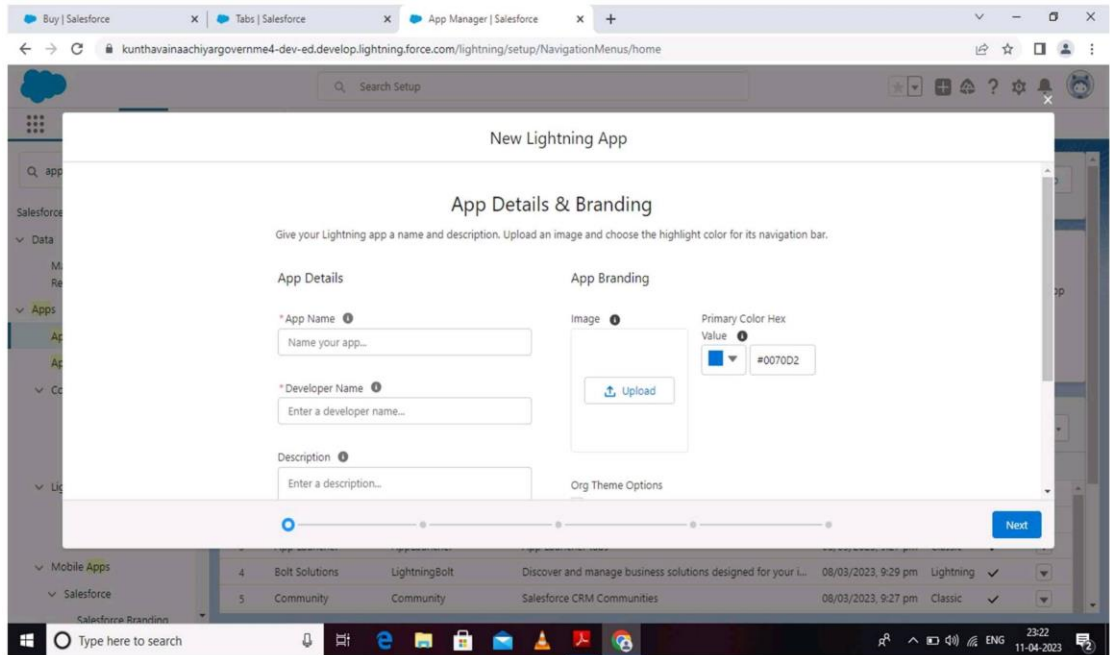
The screenshot shows the Salesforce 'New Custom Object' setup page. The browser address bar indicates the URL: `kunthavainaachiyargovernme4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page title is 'New Custom Object'. A message at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. Below this is the 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes fields for 'Label' (Example: Account), 'Plural Label' (Example: Accounts), 'Starts with vowel sound' (checkbox), 'Object Name' (Example: Account), and a 'Description' text area. A 'Required Information' indicator is present. The bottom of the page shows a Windows taskbar with the date '13-04-2023' and time '08:18'.

- Standard objects are the kind of object that is provided by salesforce such as users , contracts, reports and dashboard .
- We create our objects in custom object such as lead, loan, rent, buy.
- It is used to store the data that is used in the specified organisation.
- Objects are the database tabels that permit you to store data that is used in the specified organisation.

A tab is a user interface that is used to store and build records for project.



- Lightning app is a collection of items that work together to serve a particular function.
- It gives your users access to sets of objects and tabs and other items all in one convenient bundle in the navigation bar.
- It is a builder point and click tool that make it easy to create custom pages .



A profile is a group or collection of settings and permissions that define what a user can do in salesforce. In the project we clone the profiles sales manager and standard platform user.

The screenshot shows the Salesforce 'New User' setup page. The browser address bar indicates the URL: `kunthavainaachiyargovernme4-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2F%3FURL%3D%252F005%253FisUserEn...`. The page title is 'New User'. The left sidebar shows the 'Users' section under 'User Management Settings'. The main content area is titled 'New User' and contains a 'User Edit' form. The form has two columns of fields. The left column, under 'General Information', includes: First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The right column includes: Role (set to '<None Specified>'), User License (set to 'Force.com - Free'), Profile (set to '--None--'), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type. At the bottom of the form are buttons for 'Save', 'Save & New', and 'Cancel'. A 'Required Information' icon is visible in the top right of the form area. The Windows taskbar at the bottom shows the date as 11-04-2023 and the time as 23:25.

It is a user page that is used to login to the salesforce. users are employees at your company such as sales rep, managers, and IT specialists.

Every user in salesforce has a user account that uses to access to kept the company records safely.

New Lead with Loan Amount | Sales | +

kunthavainaachiyargovernme4-dev-ed.develop.lightning.force.com/lightning/r/Report/00Q2w00000E2QR5EAN/view?queryScope=userFolders

Search...

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

Report: Accounts
New Lead with Loan Amount

Enable Field Editing Add Chart Edit

Total Records: 12

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

To Do List

Type here to search

22:47 11-04-2023

Loan Amount Transaction | Sales | +

kunthavainaachiyargovernme4-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000pS4EAI/view?queryScope=userFolders

Search...

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

Dashboard
Loan Amount Transaction

Refresh Edit Subscribe

Last refreshed 13 days ago. Refresh this dashboard to see the latest data.
As of 31-Mar-2023, 6:06 pm: Viewing as akalya senthil

New Lead with Loan Amount

To view this table, refresh the dashboard.

View Report

To Do List

Type here to search

20:48 13-04-2023

Trailhead profile URL

Team leader- <https://trailblazer.me/id/sudhc11>

Team member 1- <https://trailblazer.me/id/abina241>

Team member 2- <https://trailblazer.me/id/akgkt1106>

Team member 3- <https://trailblazer.me/id/prems77>

Advantages and disadvantages

Advantages

- Easy maintenance and monitoring.
- you will increase bookings by refining your online presence .
- Maintenance management and tracking.
- You will save time and money by being more efficient.
- You can access your information anytime and anywhere.

Disadvantages:

- Time consuming if you choose the wrong system.
- Cost can be prohibition in the beginning.
- Might seem expensive for a small business.
- Long term investment real estate investments are always made as apart of long term strategy.

Application:

- Catalyzes growth.
- Automated clints and tenant remainder
- Real estate management CRM
- Agent hub property administration CRM

conclusion :

salesforce property management is used to easily sell or buy the properties. It is associated with clients and tenants continuously. The goal of this analysis was to determine with business process elements were critical to the mission of the real property function according to the federal law requirements and which business process elements were not critical.

Future scope:

- internet is the most thing thst do the whole work easily that help the hitech sensors and other IT departments to make the management easily.

- Real estate virtual tour software development, real estate business can better showcase their properties,reduce cost related to physical property tours,and increases conversion rates.

