

PROJECT REPORT TEMPLATE

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION

1.1 Overview

A Property Management system 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. PMS enhances communication between tenants,owners and managers,making it easier for all parties to stay informed and connected in real time

1.2 Purpose

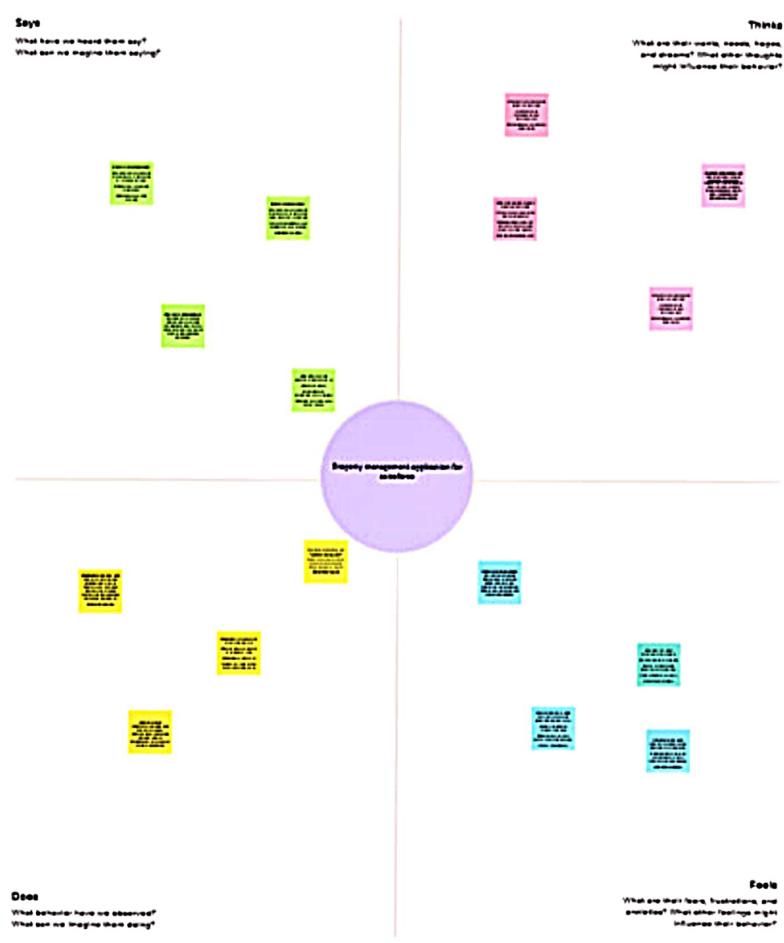
- i) Salesforce property management enables the realty managers to keep track of crucial data about financial.
- ii) Household properties incorporating associated cash flow,primary tenants and occupancy rates.
- iii) Property managers assist owners in creating budgets,advertise rental properties, qualify tenants and collect rent
- iv) They also comply with the local landlord and real estate board laws and maintain the property.

2 Problem Definition& Design Thinking

2.1 Empathy Map

Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.



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2.2 Ideation & Brainstorming Map

← → ⌂ | title:///C:/Users/LENOVO/Downloads/Untitled_2023-03-24_08-41-37.ppt

— + ⌂ Fit to page ⌂ Page view A) Read aloud Add notes

1 of 1 | 1

Define your problem statement
Identify the problem you want to solve. Start by writing down what you see as a key part of the statement. This will be the focus of your brainstorm.

Brainstorm
Brainstorm, write what comes to mind. Put down your first 10 ideas.
10 minutes

Group ideas
Take turns sharing your ideas while clustering them or writing them down. Choose 5 ideas that you feel good about. Give each idea a different color if it's easier to track them by color. By the end of this step, you should have a list of 10 ideas.

Priority
Your team should all be on the same page about what's important moving forward. Rate your ideas on the grid to determine which ideas are important and which are less so.

Key steps of brainstorming
You are an engineer and problem solver.
1. Day in life → Encourage and ideas
2. Brainstorm → Listen to others
3. Take notes → Prioritize ideas

3) RESULT FIELDS IN THE OBJECTS

3.1 DATA MODEL

OBJECT NAME	FIELD IN THE OBJECTS	
	FIELD LABEL	DATA TYPE
Lead	1)lead	Auto number
	2)State	Picklist
	3)City	Picklist
	4)Email	Email
	5) Phone	Phone
Buy	1) Property type	Picklist
	2) Discount	Percent
	3) State	Picklist
	4)City	Picklist
Rent	1)Rent	Auto number
	2) Rental City	Text
	3)BHK type	Picklist

OBJECT NAME	FIELD IN THE OBJECTS	
	FIELD LABEL	DATA TYPE
Loan	1) Loan ID	Auto number
	2) Interest Rate	Currency
	3) Term	Number
	4) Annual Loan	Number
	5) Total Loan Instalments	Number
	6) Loan Repayment	Number
	7) Loan Amount	Formula
3.2 ACTIVITY	AND	SCREENSHOTS

https://governmentartsandscienceco-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Lead/Details/vie

Cloud icon

Setup Home Object Manager

Search Setup

Object Manager: Lead

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

Lead

Custom

Singular Label

Lead

Plural Label

Leads

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Standard salesforce.com Help Window

https://governmentartsandscienceco-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003X

Cloud icon

Setup Home Object Manager

Search Setup

Object Manager: buy

Details

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Details

Description

API Name

buy_c

Custom

Singular Label

buy

Plural Label

buy

Edit Delete

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Setup Home Object Manager

SETUP > OBJECT MANAGER Rent

Details

Description

API Name
rent_c

Custom ✓

Singular Label
Rent

Plural Label
Rent

Details

Enable Reports ✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Setup Home Object Manager

SETUP > OBJECT MANAGER loan

Details

Description

API Name
loan_c

Custom ✓

Singular Label
loan

Plural Label
loan

Details

Enable Reports ✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Setup Home Object Manager

SETUP > OBJECT MANAGER Lead

Fields & Relationships 29+ Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address	Address		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
City	City_c	Picklist		
Clean Status	CleanStatus	Picklist		✓
Company	Company	Text(255)		✓
Company D-U-N-S Number	CompanyDunsNumber	Text(9)		
Created By	CreatedBy	Lookup(User)		
Current Generator(s)	CurrentGenerators_c	Text(100)		

Setup Home Object Manager

SETUP > OBJECT MANAGER Lead

Fields & Relationships 29+ Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
D&B Company	DandbCompanyId	Lookup(D&B Company)		✓
Data.com Key	Jigsaw	Text(20)		
Description	Description	Long Text Area(32000)		
Do Not Call	DoNotCall	Checkbox		
Email	Email_c	Email		
Email	Email	Email		✓
Email Opt Out	HasOptedOutOfEmail	Checkbox		
Fax	Fax	Fax		
Fax Opt Out	HasOptedOutOfFax	Checkbox		

← → C https://governmentartsanddsscienceco-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Lead/FieldsAndRelationships

Cloud Search Setup Object Manager

Setup Home Object Manager

SETUP > OBJECT MANAGER Lead

Details Fields & Relationships 40 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking Map Lead Fields

Page Layouts	Lead Status	Status
Lightning Record Pages	Mobile	MobilePhone
Buttons, Links, and Actions	Name	Name
Compact Layouts	No. of Employees	NumberOfEmployees
Field Sets	Number of Locations	NumberofLocations_c
Object Limits	Phone	Phone_c
Record Types	Phone	Phone
Related Lookup Filters	Primary	Primary_c
Search Layouts		

← → C https://governmentartsanddsscienceco-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Lead/FieldsAndRelationships

Cloud Search Setup Object Manager

Setup Home Object Manager

SETUP > OBJECT MANAGER Lead

Details Fields & Relationships 40 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking Map Lead Fields

Page Layouts	Primary	Primary_c
Lightning Record Pages	Product Interest	ProductInterest_c
Buttons, Links, and Actions	Pronouns	Pronouns
Compact Layouts	Rating	Rating
Field Sets	SIC Code	SICCode_c
Object Limits	State	State_c
Record Types	Title	Title
Related Lookup Filters	Website	Website
Search Layouts		

https://governmentartsandscienceco-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003X

Setup Home Object Manager

SETUP > OBJECT MANAGER
buy

Fields & Relationships					
FIELD LABEL		FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
buy Name	Name	Type(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)			✓
Property Type	Property_Type_c	Picklist			▼
State	State_c	Picklist			▼

https://governmentartsandscienceco-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003Xb4u/F

Setup Home Object Manager

SETUP > OBJECT MANAGER
Rent

Fields & Relationships					
FIELD LABEL		FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BHK Type	BHK_Type_c	Picklist			▼
Created By	CreatedById	Lookup(User)			▼
Last Modified By	LastModifiedById	Lookup(User)			▼
Owner	OwnerId	Lookup(User,Group)			✓
Rent	Rent_c	Auto Number			▼
rent Name	Name	Type(80)			✓
Rental City	Rental_City_c	Text Area(255)			▼

Setup Home Object Manager

SETUP > OBJECT MANAGER
loan

Details

Fields & Relationships
11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Loan	Annual_c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Interest Rate	Interest_Rate_c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount_c	Formula (Currency)		
loan Name	Name	Text(80)		✓
Loan Repayment	Loan_Repayment_c	Number(18, 0)		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Setup Home Object Manager

SETUP > OBJECT MANAGER
loan

Details

Fields & Relationships
11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Last Modified By	LastModifiedById	Lookup(User)		
Loan Amount	Loan_Amount_c	Formula (Currency)		
loan Name	Name	Text(80)		✓
Loan Repayment	Loan_Repayment_c	Number(18, 0)		
LoanId	LoanId_c	Auto Number		
Owner	OwnerId	Lookup(User,Group)		✓
Term	Term_c	Number(18, 0)		
Total Loan Instalments	Total_Loan_Instalments_c	Number(18, 0)		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Quick Find New Deleted Fields Field Dependencies Set History Tracking

 SETUP
Profiles

Profile

Custom: Marketing Profile

Help for this Page 

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) |
[Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name **Custom: Marketing Profile**

User License **Salesforce**

Custom Profile

Description

Created By [vasantha kumar](#), 27/03/2023, 1:51 pm

Modified By [vasantha kumar](#), 15/04/2023, 10:22 am

Page Layouts

Standard Object Layouts

Global **Global Layout**
[[View Assignment](#)]

Object Milestone **Object Milestone Layout**
[[View Assignment](#)]

Email Application **Not Assigned**
[[View Assignment](#)]

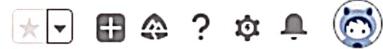
Operating Hours **Operating Hours Layout**
[[View Assignment](#)]

Home Page Layout **DE Default**

Opportunity **Opportunity_(Marketing) Layout**

   <https://governmentartsandscienceco-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F> 

 Search Setup



Manager 

 SETUP
Profiles

Profile

Custom: Sales Profile

Help for this Page 

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) |
[Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name **Custom: Sales Profile**

User License **Salesforce**

Custom Profile

Description

Created By [vasantha kumar](#), 27/03/2023, 1:51 pm

Modified By [vasantha kumar](#), 14/04/2023, 11:33 pm

Page Layouts

Standard Object Layouts

Global **Global Layout**
[[View Assignment](#)]

Object Milestone **Object Milestone Layout**
[[View Assignment](#)]

Email Application **Not Assigned**
[[View Assignment](#)]

Operating Hours **Operating Hours Layout**
[[View Assignment](#)]

Home Page Layout **DF Default**

Opportunity **Opportunity_(Sales) Layout**

SETUP Profiles

Profile

Help for this Page

Custom: Support Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name **Custom: Support Profile**

Custom Profile

User License **Salesforce**

Description

Created By [vasantha kumar](#), 27/03/2023, 1:51 pm

Modified By [vasantha kumar](#), 14/04/2023, 11:33 pm

Page Layouts

Standard Object Layouts

Global [Global Layout](#)

[[View Assignment](#)]

Object Milestone [Object Milestone Layout](#)

[[View Assignment](#)]

Email Application Not Assigned

[[View Assignment](#)]

Operating Hours [Operating Hours Layout](#)

[[View Assignment](#)]

Home Page Layout DE Default

Opportunity [Opportunity_\(Support\)_Layout](#)

https://governmentartsandscienceco-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Manager

SETUP Users

Help for this Page

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [All Users](#) [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00d2w00000rqdgrea.z_dtmvdgjjir@chatter.salesforce.com			Chatter Free User
Edit	kumar, vasantha	vkuma	vasanthakumar2002@gac.com			System Administrator
Edit	Kumar, Vasantha	vkuma	vasanthakumark8@gmail.com			Standard User
Edit	User_Integration	integ	integration@00d2w00000rqdgrea.z.com			Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d2w00000rqdgrea.z.com			Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

https://governmentartsandddscienceco-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w0

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

SETUP

Permission Sets

Permission Set Object

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description License Session Activation Required Last Modified By vasantha kumar, 15/04/2023, 9:34 am

API Name Object Namespace Prefix Created By vasantha kumar, 15/04/2023, 9:34 am

Video Tutorial | Help for this Page

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

https://governmentartsandddscienceco-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

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

Search...

Reports

Recent 1 item

Private Reports Public Reports All Reports FOLDERS All Folders Created by Me Shared with Me FAVORITES All Favorites

New Leads Report Private Reports vasantha kumar 15/4/2023, 12:43 pm

Search recent reports... New Report New Folder

The screenshot shows the Salesforce Lightning Home page. At the top, there's a navigation bar with icons for back, forward, and refresh, followed by the URL https://governmentartsandddscienceco-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru. To the right of the URL are standard browser controls like a star for bookmarks, a search bar, and a menu icon.

The main content area is titled "Dashboards" and "Recent". It displays a table of recent dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Loan Amunt Transaction		Private Dashboards	vasantha kumar	15/4/2023, 12:46 pm	
Created by Me	Loan Amount		Private Dashboards	vasantha kumar	15/4/2023, 12:44 pm	

On the left sidebar, there are links for "Dashboards", "Recent" (with 2 items), "DASHBOARDS" (Recent, Created by Me), "Private Dashboards", "All Dashboards", "FOLDERS" (All Folders, Created by Me, Shared with Me), and "FAVORITES" (All Favorites).

4 TRAILHEAD PROFILE PUBLIC URL

Team Lead- <https://trailblazer.me/id/vkumar3371>

Team Member 1- <https://trailblazer.me/id/aprasanth70>

Team Member 2- <https://trailblazer.me/id/gkannan28>

Team Member 3- <https://trailblazer.me/id/rravi359>

5) ADVANTAGES

- i)The application should be accessible on mobile devices,enabling users to manage their properties and tenants on-the-go.
- ii)The application should provide document management capabilities , allowing users to store and share property -related documents ,such as lease agreements and maintenance records.
- iii)The application should enable users to process rent payment ,security deposits and other fees electronically.
- iv)The application should be scalable ,allowing users to manage multiple properties and tenants as their business grows.

DISADVANTAGES

They make accounting , monitoring and communicating processes simpler.In the owner's tab,all the details are available about the properties.While reducing third-party resources,property management software accelerates business processes so that you can achieve greater management uniformity and improve performance.

6) APPLICATION

The application of Property Management are ,

- i)Real Estate
- ii)Builds
- iii)apartments
- iv) Lease properties

7 CONCLUSION

- i) Use this project for industrial purposes in a wide range.
- ii) Low cost.
- iii) The accuracy of this project may be improved by adding some features.

8 FUTURE SCOPE

Property management application should allow users to manage all aspects of their properties ,including vacancies,maintenance and leasing. This application should allow users to manage lease agreements , including lease terms, renewal options and rental rates. This application should offer communication tools, such as email and SMS notification , to keep tenants and maintenance personal informed of important updates.