

**PROJECT REPORT TEMPLATE**  
**PROPERTY MANAGEMENT APPLICATION**  
**USING SALESFORCE**  
**TEAM ID : NM2023TMID18392**

**1.INRODUCTION**

**1.1 Overview :**

A property management application built on the Salesforce platform can help property managers streamline their operations, improve tenant communication, and increase revenue.

**1.2 Purpose :**

The purpose of a property management application using Salesforce is to provide property managers with a comprehensive and efficient tool to manage their properties, tenants, leases, maintenance requests, and other related tasks. By leveraging the power of the Salesforce platform, property managers can automate many of their manual processes, reduce errors, and improve overall operational efficiency.

This involves using Salesforce's powerful tools and features to track and manage everything related to a company's real estate holdings, including properties, tenants, leases, maintenance schedules, and more.

## **2. Problem Definition & Design Thinking**

### **2.1 Empathy map :**

An empathy map is a collaborative visualization used to articulate what we know about a particular type of user. It externalizes knowledge about users in order to

- 1) create a shared understanding of user needs, and
- 2) aid in decision making

### **EMPATHY MAP**

PROJECT NAME :	PROPERTY MANAGEMENT APPLICATION USING SALESFORCE
TEAM ID :	NM2023TMID18392
DATE:	21.03.2023
NAME:	VIGNESH. E



## Empathy map

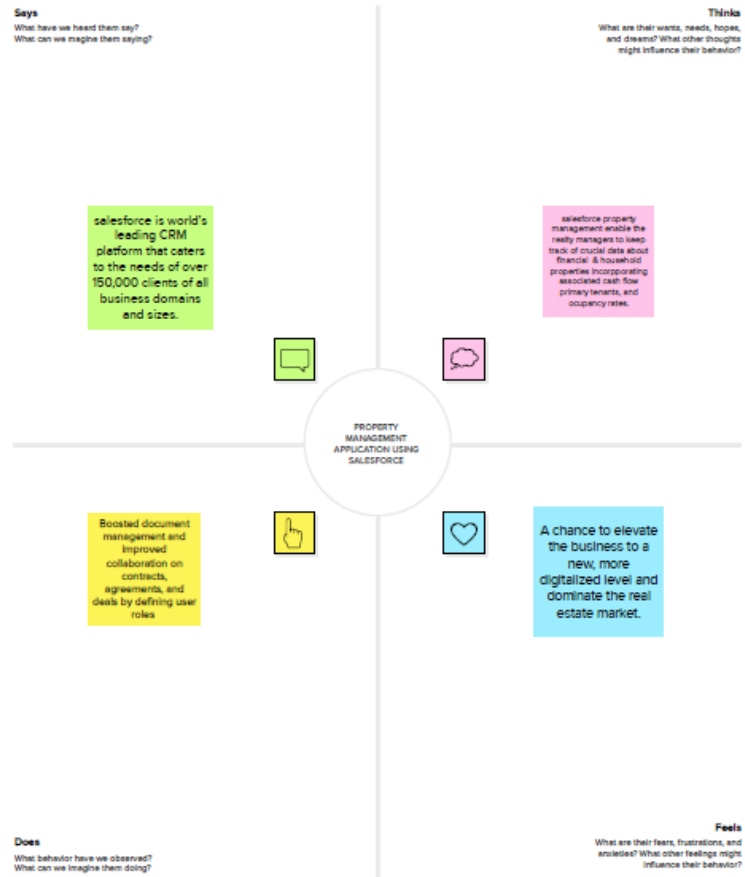
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)



### Build empathy

The information you add here should be representative of the observations and research you've done about your users.



### Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example](#)



## 2.2 Brainstorming :

Brainstorming is a group problem-solving method that involves the spontaneous contribution of creative ideas and solutions. This technique requires intensive, freewheeling discussion in which every member of the group is encouraged to think aloud and suggest as many ideas as possible based on their diverse knowledge.

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[illegible]



### **3.RESULT**

#### **3.1 Data Model :**

Object name		Field label	Data type
<b>1</b>	Lead	Lead	Auto-Number
	Buy	Buy	Picklist
<b>3</b>	Rent	Rent	Auto-Number
	Loan	Loan	Auto- Number

#### **3.2 Activity & Screenshort :**

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## Lightning Experience Transition Assistant

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## Salesforce Mobile Quick Start

Home

### Administer

- Release Updates
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### Build

- Customize
- Create
- Develop
- Lightning Bolt
  - Schema Builder
  - Lightning App Builder
  - Canvas App Previewer
  - Installed Packages
  - Package Usage
  - AppExchange Marketplace

### Deploy

- Deployment Settings
- Deployment Status

### Monitor

- System Overview
- Optimizer
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- Time-Based Workflow
- Automated Process Actions
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- Entitlement Processes
- API Usage Notifications
- Mass Emails
- Email Snapshots
- Jobs
- Logs

## Getting Started

Dismiss X



### Build App

Generate a basic app with just one step, and then easily extend that app with clicks or code.

Add App



### Salesforce Lightning

Turn on the power, speed, and simplicity of the new Salesforce user experience

Get Started

## System Overview

Expand



You have a message.

Expand to see messages or go to the [system overview page](#) to see additional limits.

## Recent Items

Name	Type	Object
Vignesh Elumalai	User	
Loan	Custom Object Definition	
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Loan	Custom Field Definition	Loan
Rent	Custom Field Definition	Rent

## Quick Links



Tools

- App Quick Start
- Schema Builder
- New custom object



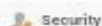
Users

- New user
- Add multiple users
- Reset users' passwords



App

- Manage apps
- Manage profiles
- Enable Chatter feeds



Security

- New profile
- New permission set
- Add roles



Data

- Import accounts & contacts
- Import custom objects
- Mass delete records

## Community

Dismiss X

### Resources

Collaborate & Discuss  
Join the conversation.

### Find Answers

Post your questions to the Community.

Ask a Question

### Contribute Ideas

Share & vote for ideas to improve the product.

Post an Idea

User Groups  
Connect with customers in your area.

Release Resources

 AppExchange

Recommended Apps [Show All](#)



HaloSight - AI for any text I...  
try HaloSight  
★★★★★ (7)

Extract valuable insights from conversational data and improve your customer journey...



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### Custom Object

#### lead

[Standard Fields](#) | [Custom Fields & Relationships](#) | [Validation Rules](#) | [Page Layouts](#) | [Field Sets](#) | [Compact Layouts](#) | [Search Layouts](#) | [Buttons, Links, and Actions](#) | [Record Types](#) | [Apex Sharing Reasons](#) | [Apex Sharing Recalculation](#) | [Object Limits](#)

#### Custom Object Definition

[Edit](#) [Delete](#)

Singular Label	lead	Description	
Plural Label	leads	Enable Reports	✓
Object Name	lead	Track Activities	✓
API Name	lead__c	Allow in Chatter Groups	✓
		Allow Sharing	✓
		Allow Bulk API Access	✓
		Allow Streaming API Access	✓
		Track Field History	✓
		Enable Licensing	✓
		Deployment Status	Deployed
		Allow Search	✓
		Help Settings	Standard salesforce.com Help Window
		Modified By	Vignesh Elumalai, 29/03/2023, 2:52 pm

Created By Vignesh Elumalai, 29/03/2023, 2:52 pm

#### Standard Fields

[Standard Fields Help](#)

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	Created By	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
<a href="#">Edit</a>	Lead Name	Name	Text(80)		✓
<a href="#">Edit</a>	Owner	Owner	Lookup(UserGroup)		✓

#### Custom Fields & Relationships

[New](#) [Field Dependencies](#)

[Custom Fields & Relationships Help](#)

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	lead__c	lead__c	Auto Number			Vignesh Elumalai, 29/03/2023, 2:54 pm
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	Lead	state__c	Picklist			Vignesh Elumalai, 29/03/2023, 2:55 pm
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	Lead	City__c	Picklist			Vignesh Elumalai, 29/03/2023, 2:56 pm
<a href="#">Edit</a>   <a href="#">Del</a>	Lead	Email__c	Email			Vignesh Elumalai, 29/03/2023, 2:57 pm
<a href="#">Edit</a>   <a href="#">Del</a>	Lead	Phone__c	Phone			Vignesh Elumalai, 29/03/2023, 2:58 pm

#### Related Lookup Filters

No related lookup filters defined.

#### Validation Rules

[New](#)

[Validation Rules Help](#)

No validation rules defined.

#### Triggers

[New](#)

[Triggers Help](#)

No triggers defined.

#### Page Layouts

[New](#) [Page Layout Assignment](#)

[Page Layouts Help](#)

Action	Page Layout Name	Created By	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	lead Layout	Vignesh Elumalai, 29/03/2023, 2:52 pm	Vignesh Elumalai, 29/03/2023, 2:58 pm

#### Field Sets

[New](#)

[Field Sets Help](#)

No field sets defined.

#### Compact Layouts

[New](#) [Compact Layout Assignment](#)

[Compact Layouts Help](#)

Action	Label	API Name	Primary	Modified By
	System Default	SYSTEM	✓	

#### Search Layouts

[Search Layouts Help](#)

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
<a href="#">Edit</a>	Search Results	lead Name		Vignesh Elumalai, 29/03/2023, 2:52 pm
<a href="#">Edit</a>	Lookup Dialogs	lead Name	N/A	Vignesh Elumalai, 29/03/2023, 2:52 pm
<a href="#">Edit</a>	Lookup Phone Dialogs	lead Name, Lead	N/A	Vignesh Elumalai, 29/03/2023, 2:52 pm
<a href="#">Edit</a>	leads Tab	lead Name	N/A	Vignesh Elumalai, 29/03/2023, 2:52 pm
<a href="#">Edit</a>	leads List View	N/A	New, Open in Quip, New From Document, Accept, Change Owner, Import, Change Owner, Printable View	Vignesh Elumalai, 29/03/2023, 2:52 pm
<a href="#">Edit</a>	Search Filter Fields	N/A		Vignesh Elumalai, 29/03/2023, 2:52 pm

#### Buttons, Links, and Actions

[New Action](#) [New Button or Link](#)

[Buttons, Links, and Actions Help](#)

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
<a href="#">Edit</a>	Accept	Accept			Standard page		✓
<a href="#">Edit</a>	Clone	Clone			Standard page		✓
<a href="#">Edit</a>	Delete	Delete			Standard page		✓
<a href="#">Edit</a>	Edit	Edit			Standard page		✓
<a href="#">Edit</a>	leads Tab	Tab			Standard page		✓
<a href="#">Edit</a>	List	List			Standard page		✓
<a href="#">Edit</a>	New	New			Standard page		✓
<a href="#">Edit</a>	View	View			Standard page		✓

#### Record Types

[New](#) [Page Layout Assignment](#)

[Record Types Help](#)

No record types defined.

#### Apex Sharing Reasons

[New](#)

[Apex Sharing Reasons Help](#)

No Apex sharing reasons defined.

#### Apex Sharing Recalculation

[New](#) [Recalculate Apex Sharing](#)

[Apex Sharing Recalculation Help](#)

No Apex sharing recalculations defined.

#### Object Limits

[Object Limits Help](#)

Item	Usage	Limit	% used	Message
Custom Fields	5	500	1%	
Custom Relationship Fields	0	40	0%	
Active Workflow Rules	0	50	0%	
Total Workflow Rules	0	500	0%	
Approval Processes	0	500	0%	
Active Lookup Filters	0	5	0%	
Active Validation Rules	0	100	0%	
VL00KUP Functions	0	10	0%	
Sharing Rules (Both Owner- and Criteria-based)	0	300	0%	
Sharing Rules (Criteria-based Only)	0	50	0%	

Quick Find / Search

Expand All Collapse All



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## Salesforce Mobile Quick Start

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## Custom Object

### Buy

[Standard Fields Help](#) | [Custom Fields & Relationships Help](#) | [Validation Rules Help](#) | [Page Layouts Help](#) | [Field Sets Help](#) | [Compact Layouts Help](#) | [Search Layouts Help](#) | [Buttons, Links, and Actions Help](#) | [Record Types Help](#) | [Apex Sharing Reasons Help](#) | [Apex Sharing Recalculation Help](#) | [Object Limits Help](#)

### Custom Object Definition

#### Detail

Singular Label	Buy	Description	
Plural Label	Buyers	Enable Reports	✓
Object Name	Buy	Track Activities	✓
API Name	Buy__c	Allow in Chatter Groups	✓
		Allow Sharing	✓
		Allow Bulk API Access	✓
		Allow Streaming API Access	✓
		Track Field History	✓
		Enable Licensing	✓
		Deployment Status	Deployed
		Allow Search	✓
		Help Settings	Standard salesforce.com Help Window
		Modified By	Vignesh Elumalai, 29/03/2023, 3:16 pm

Created By Vignesh Elumalai, 26/03/2023, 8:44 am

### Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
Edit	Buy Name	Name	Text(80)		✓
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User,Group)		✓

### Custom Fields & Relationships

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del   Replace	Buy	Buy__c	Picklist			Vignesh Elumalai, 29/03/2023, 3:06 pm
Edit   Del	Buy	Discount__c	Percent(18, 0)			Vignesh Elumalai, 29/03/2023, 3:07 pm
Edit   Del   Replace	Buy	State__c	Picklist			Vignesh Elumalai, 29/03/2023, 3:18 pm
Edit   Del   Replace	Buy	City__c	Picklist			Vignesh Elumalai, 29/03/2023, 3:19 pm

Deleted Fields (5)

### Related Lookup Filters

No related lookup filters defined.

### Validation Rules

No validation rules defined.

### Triggers

No triggers defined.

### Page Layouts

Action	Page Layout Name	Created By	Modified By
Edit   Del	Buy Layout	Vignesh Elumalai, 26/03/2023, 8:44 am	Vignesh Elumalai, 29/03/2023, 3:19 pm

### Field Sets

No field sets defined.

### Compact Layouts

Action	Label	API Name	Primary	Modified By
	System Default	SYSTEM	✓	

### Search Layouts

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Buy Name		Vignesh Elumalai, 26/03/2023, 8:44 am
Edit	Lookup Dialogs	Buy Name	N/A	Vignesh Elumalai, 26/03/2023, 8:44 am
Edit	Lookup Phone Dialogs	Buy Name	N/A	Vignesh Elumalai, 26/03/2023, 8:44 am
Edit	Buyers Tab	Buy Name	N/A	Vignesh Elumalai, 26/03/2023, 8:44 am
Edit	Buyers List View	N/A	New, Open in Outp, New From Document, Accept, Change Owner, Import, Change Owner, Printable View	Vignesh Elumalai, 26/03/2023, 8:44 am
Edit	Search Filter Fields	N/A		Vignesh Elumalai, 26/03/2023, 8:44 am

### Buttons, Links, and Actions

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accept	Accept			Standard page		✓
Edit	Buyers Tab	Tab			Standard page		✓
Edit	Clone	Clone			Standard page		✓
Edit	Delete	Delete			Standard page		✓
Edit	Edit	Edit			Standard page		✓
Edit	List	List			Standard page		✓
Edit	New	New			Standard page		✓
Edit	View	View			Standard page		✓

### Record Types

No record types defined.

### Apex Sharing Reasons

No Apex sharing reasons defined.

### Apex Sharing Recalculation

No Apex sharing recalculations defined.

### Object Limits

Item	Usage	Limit	% used	Message
Custom Fields	9	500	2%	
Custom Relationship Fields	0	40	0%	
Active Workflow Rules	0	50	0%	
Total Workflow Rules	0	500	0%	
Approval Processes	0	500	0%	
Active Lookup Filters	0	5	0%	

#### **4.** **TRAILHEAD PROFILE PUBLIC URL**

Team Leader - <https://trailblazer.me/id/vignesh29>

Team Member 1 - <https://trailblazer.me/id/vigng1477>

Team Member 2 - <https://trailblazer.me/id/vicky735>

Team Member 3 - <https://trailblazer.me/id/vviji17>

#### **5.** **ADVANTAGES & DISADVANTAGES**

##### **Advantages :**

- Infinite customizability of the system
- Over 4,000 native integrations both free and paid
- Consolidated databases via integration of various data sources to build a central database of accounts, properties, tenants, or listings.
- Data integration of various data sources

##### **Disadvantages :**

- Cost: Salesforce is a powerful and customizable platform, but it can be expensive to use. Building and maintaining a property management application on Salesforce can require significant investment in development, customization, and ongoing support.
- Complexity: Salesforce is a complex platform, and developing a property management application .

## **6.**

## **APPLICATIONS**

1. Salesforce Service Cloud: Service Cloud is a customer service solution that can be customized for property management purposes. It includes features for managing tenant inquiries and requests, as well as tools for scheduling maintenance and repairs.
2. Lead Management: Property managers can use Salesforce to track leads, manage relationships, and communicate with potential tenants.
3. Lead Management: Property managers can use Salesforce to track leads, manage relationships, and communicate with potential tenants.

## **7.**

## **CONCLUSION**

In conclusion, using a property management application built on the Salesforce platform can provide significant benefits for businesses that manage real estate assets. Salesforce's centralized database, customization and flexibility, collaboration and communication tools, automation and efficiency features, and mobile access make it a powerful platform for managing all aspects of property management.

## **8.**

## **FUTURE SCOPE**

As the demand for any Salesforce job role is high, a certification equips you with specialized Salesforce requirements. The right Salesforce training props you ahead in a niche area where the scope for career growth and salary is sky-high.