

GOVERNMENT ARTS COLLEGE, UDHAGAMANDALAM

DEPARTMENT OF PHYSICS

Mentor: Dr S.Venkateshwari

Team leader: Viji R

Team member 1: Yoganandhan R

Team member 2: Premkumar s

Team member 3: Ashwin D

Team member 4: Mothis Rao B

PROPERTY MANAGEMENT APPLICATION USING SALES FORCE

1.INTRODUCTION

1.1: OVERVIEW

This project aims to develop for the Property Management where Buyer can order his Requirements and get the Appropriate Details of the Property. According to his interest just provide him with some discount up to what extent he can get the discount. Also Track Whether he is Interested in taking the loan available for so just calculate how much loan Amount user can get it. Provide the Security for two different profiles like for marketing and sales team. Then Finally Create the report and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal.

1.2. PUROSE

Property Management: A few real estate brokers also work as property mangers in land management. They may provide services to buyer`s agents, as well as property management services.

Property Management is the supervision for residential, Commercial & Industrial Including Apartment. It involves adminsitring property owned by another part. And keeping all the Information Regarding Properties and help customers to get property as per there requirements.

For various reasons, property owners are hiring property management firms. Some landlords may have many rental properties in their portfolio but lack the expertise or time required to maintain the properties and deal with the tenants. Some owners have only an interest in owning rental property and profiting from them. They have professional real estate managers in this situation.

2.1: EMPATHY MAP

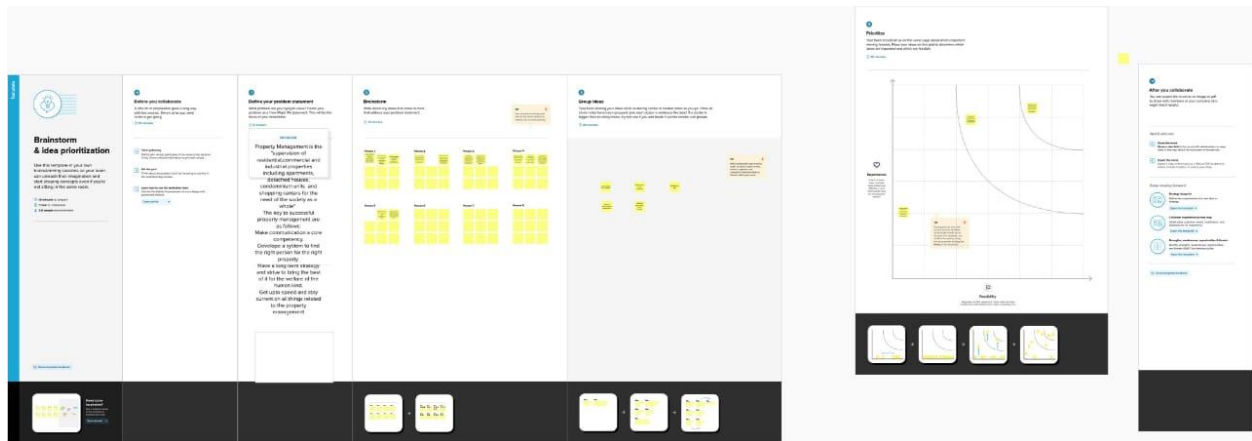
Need some inspiration?
See a finished version of this template to kickstart your work.

[Open example](#) →

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?



2.2 IDEATION & BRAINSTORMING MAP



3 RESULT

3.1 DATA MODEL

OBJECT	FIELDS IN THE OBJECT	
	FIELD LABEL	DATA TYPE
BUY	JOB TITLE	TYPE
	Amount label	Number
	BUY	Text
	BUY NAME	Text
	CITY	Text
	CREATED BY	Look up
	DISCOUNT	percent

	LAST MODIFIED BY	Look up
	OWNER	Look up
	PROPERTY TYPE	Pick list
	RENT	Text
	STATE	Pick list
LOAN	ANNUAL LOAN	NUMBER
	CREATED BY	LOOK UP
	INTREST RATE	CURRENCY
	LOST MODIFIED BY	LOOK UP
	LOAN	LOOK UP
	LOAN AMOUNT	NUMBER
	LOAN ID	AUTO NUMBER
	LOAN NAME	TEXT
	LOAN REPAYMENT	NUMBER
	OWNER	LOOK UP
	TEAM	NUMBER
	TOTAL LOAN INSTALMENT	NUMBER

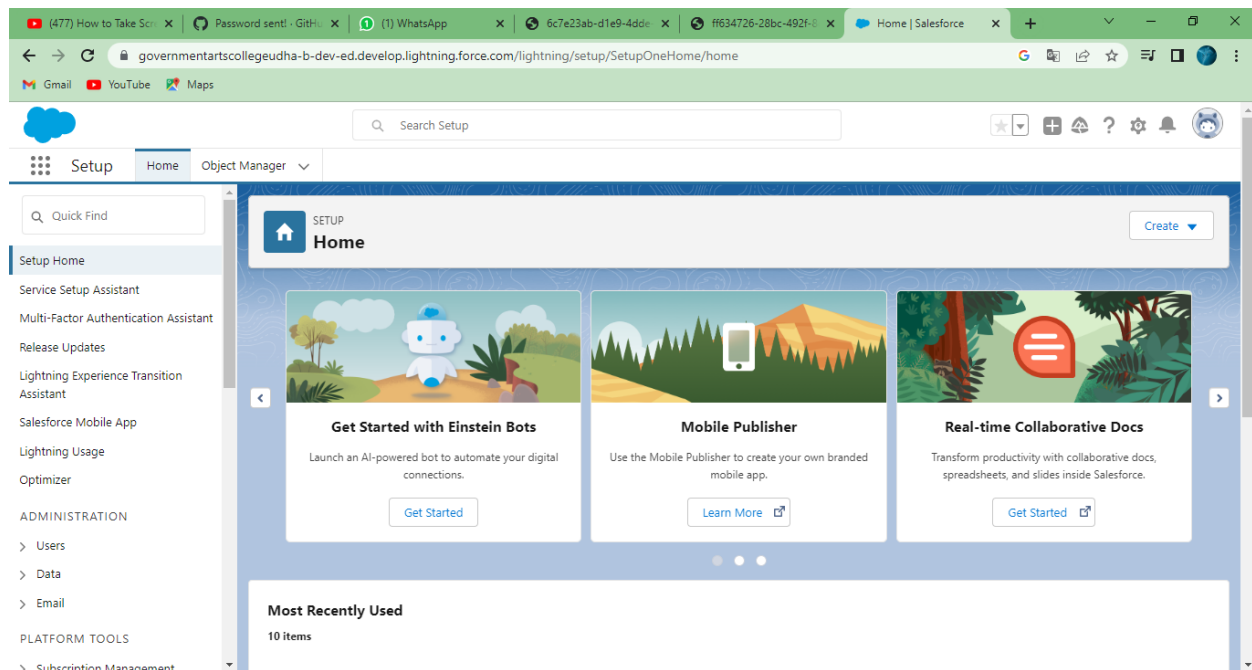
RENT		
	CREATED BY	LOOK UP
	LAST MODIFIED BY	LOOK UP
	OWNER	LOOK UP
	RENT	AUTO NUMBER
	RENT NAME	TEXT
	RENTAL	TEXT

3.2 ACTIVITY & SCREENSHOTS:

Milestone 1: Creation of Developer Account

Description:

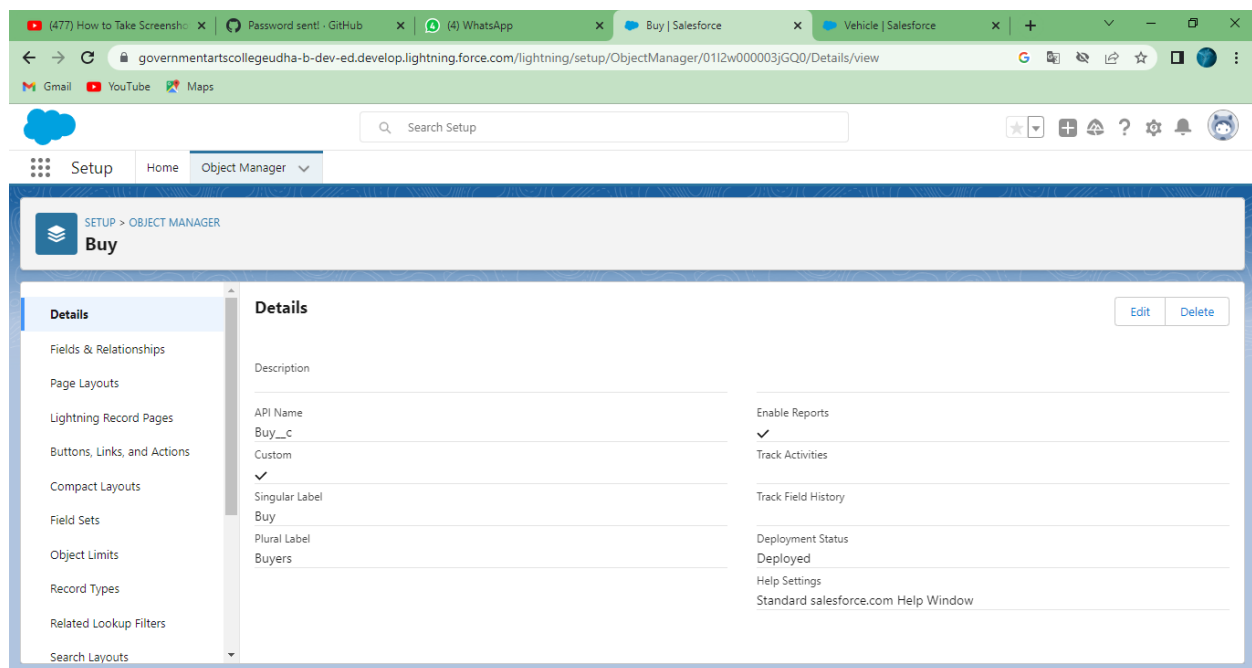
We had created a developer account and verified it for the salesforce project.



Milestone 2: Object

Description :

Created a custom object with a label named “Buy”, “Loan” and “Rent”.



Milestone 3 : Fields

Description :

Created a fields and relationship for by object Buy, Rent, Loan
Detail Relationship

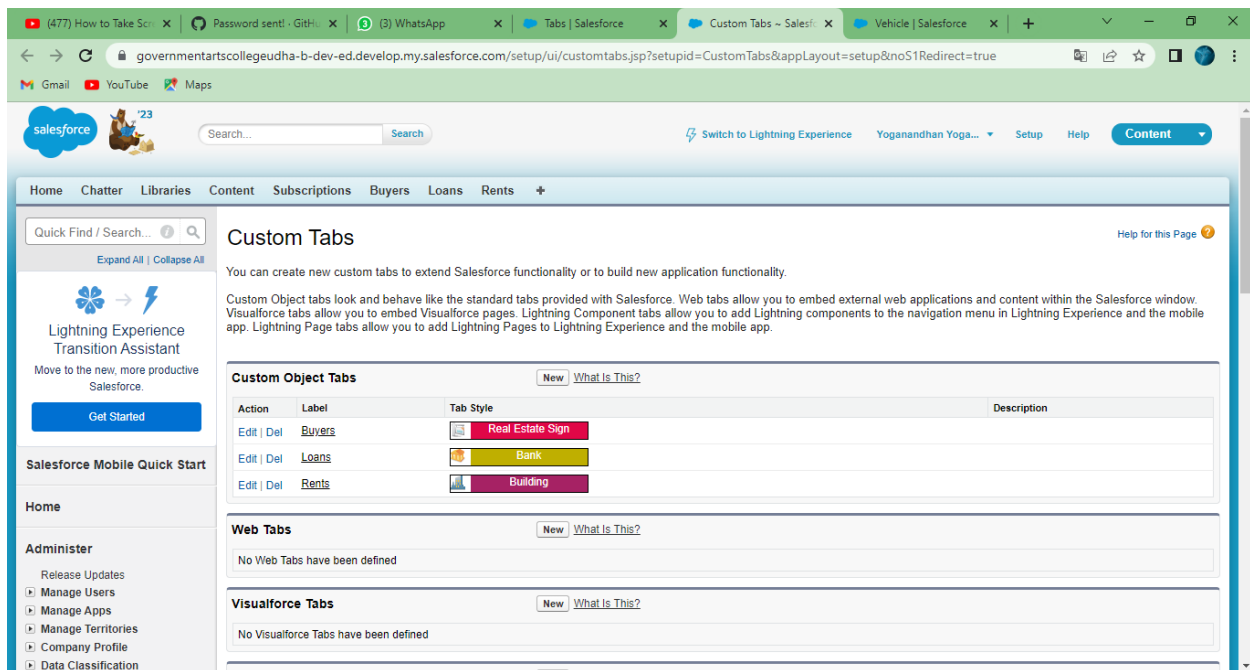
The screenshot shows the Salesforce Setup interface for the 'Buy' object. The 'Fields & Relationships' section is active, displaying a list of 11 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Annual Amount	Annual_Amount__c	Number(7, 0)		
Buy	Buy__c	Text(3)		
Buy Name	Name	Text(80)		✓
City	City__c	Text(10)		
Created By	CreatedById	Lookup(User)		
Discount	Discount__c	Percent(3, 0)		
Last Modified By	LastModifiedById	Lookup(User)		

Milestone 4 :

DESCRIPTION :

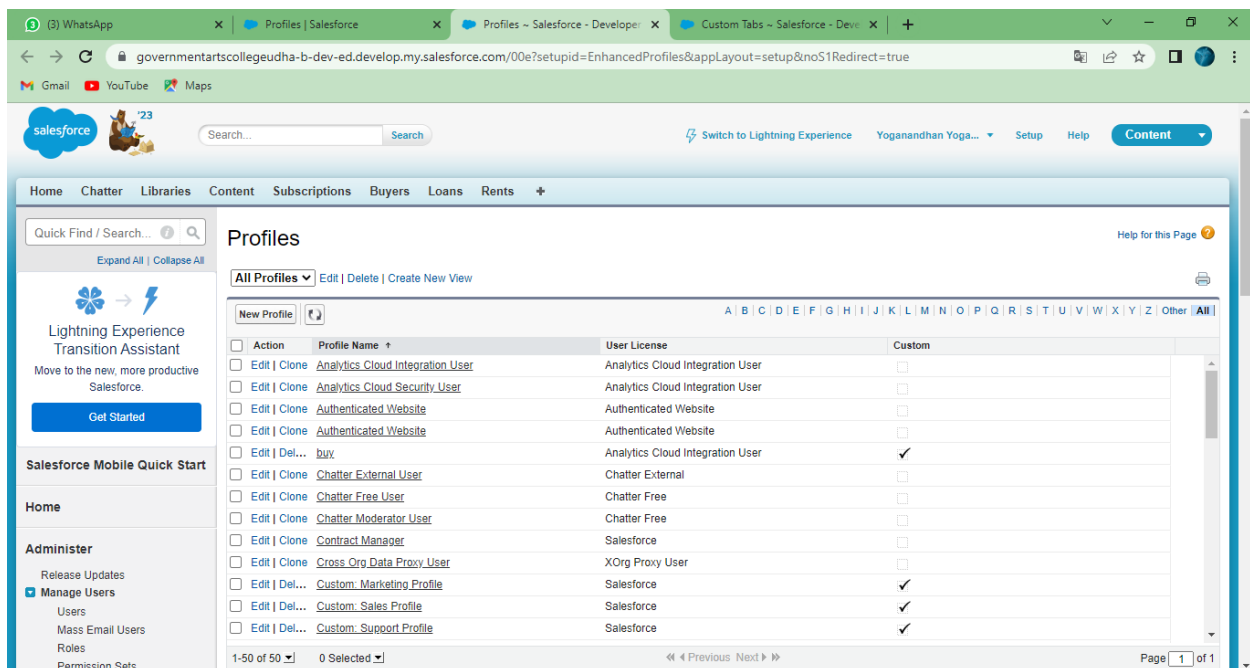
Created a tab for “ Buy”, ”Rent” and “Loan”



Milestone 5 : Profile

Description :

Created a custom profile for “Buy”, “Loan” and “Rent”



Created a user for a Marketing Manager as “Kumar Sam”

Created a Permission set for Buy, Rent, Loan

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

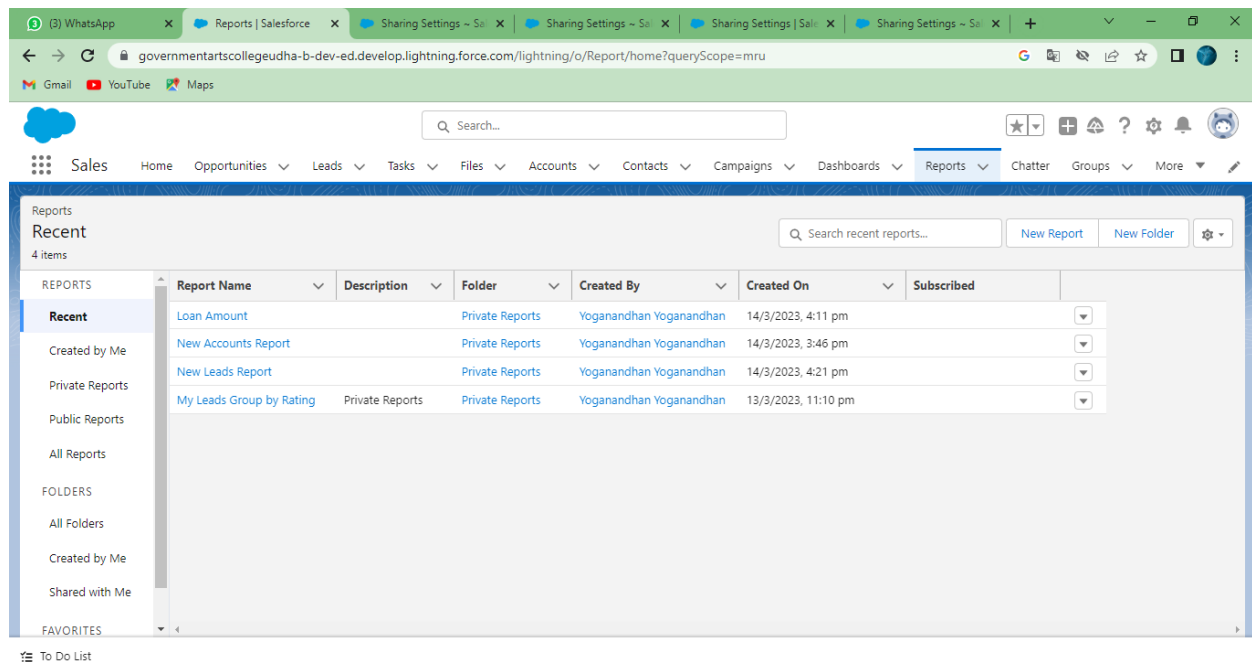
Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to man...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud ...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<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 ce...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice conta...	Service Cloud Voice User
<input type="checkbox"/> Del Clone	Experience Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service m...	Field Service Mobile
<input type="checkbox"/> Del Clone	Marketing Executive		

1-34 of 34 | 0 Selected | << Previous Next >> | Page 1 of 1

Milestone 8 : Reports

Description:

Created a report using object Buy, Loan and Rent Property Management.



4. TRAILHEAD PROFILE PUBLIC URL:

Team Leader (Viji) : <https://trailblazer.me/id/vijir11>

Team Member 1(Yoganandhan): <https://trailblazer.me/id/yoganandhan>

Team Member 2(Prem kumar): <https://trailblazer.me/id/pkumar4692>

Team Member 3(Ashwin): <https://trailblazer.me/id/ashwd6>

Team Member 4(Mothis Rao): <https://trailblazer.me/id/mothisrao>

5.1 ADVANTAGES OF THE PROPERTY MANAGEMENT APPLICATION SYSTEM USING SALESFORCE PROJECT:

- Reduces add-ons
- Saves time
- Minimizes the administration costs

- Represents a centralized, efficient document platform
- Facilitates managing orders
- Allows creating [user-tailored property management forms](#)
- Saves money
- Provides insight into daily managerial tasks
- Provides real-time coordination between multiple users
- Facilitates delegating work and keeping up with the deadlines
- [Notification](#) and alert feature
- Improves communication between the employees and colleagues by introducing task discussions
- Facilitates the owner-tenant communication
- Decreases chances of misunderstanding and disputes
- Organizes your trust account audit data
- Automates daily operational workflow
- Automates finances and maintenance.

In addition, as this is a cloud-based software, it is also:

- Cheaper than the server-based software
- It provides automatic backups
- It has increased flexibility and efficiency
- Impeccable accessibility
- Scalability
- Remote-access option
- Integration with other software and channel managers
- Accessible from different devices.

5.2 DISADVANTAGE OF THE PROPERTY MANAGEMENT APPLICATION SYSTEM USING SALESFORCE:

Disadvantages of property management software installation result from the inadequate use or picking the wrong system for your business. Those include:

- Time-consuming if you choose the wrong system. Make sure you analyze your own business, the scope of the projects you lead and work on and decide on the type of the property management system which will suit you the best. If you are running a small business, choosing a simple, user-friendly interface PMS is the best option.
- Might seem expensive for a small business. However, the system will pay off within less than a year as it will literally start making money for you. The investment is worth the expense in the long run.
- Training (cost and time). This depends on the readiness of your staff to learn. However, the software is user-friendly and everyone should be able to learn how to use it within a week.

In conclusion, there are more pros than the cons. The disadvantages such as price and training should be observed as investments that will pay off within a short period of time. The advantages of the correct choice and use of property management software lead to more free time for other tasks, efficient task delegating, improved communication and organized documentation. [Automated workflows](#) and trust account transaction control are its strongest assets.

APPLICATIONS :

- Bookings
- Check-in and check-out
- Telephone systems integration
- Point of sale (POS) integration
- Event planning
- Food and beverage costing
- Hotel inventory supply management
- Reporting of key performance indicators (KPI)
- Security and room locks

CONCLUSION :

In conclusion, Property Management System (PMS) software is very crucial for all the Hotels. Especially Opera PMS constitutes the most appropriate PMS software for Hilton Athens. It is user friendly, connects with Central Reservation System (CRS), Point of Sale (POS) etc. and provides all the tools the hotel needs in order to operate effectively.

Property management has long been overlooked in the real estate industry.

FUTURE SCOPE:

Property managers' work became very appreciated when the world started to suffer a pandemic. Property managers were underrated until their services were imperative to keep rental properties above water.

The twenty-twenties have assured a new era of property management, and here's what we see now and predict more of in the future of property management.

Resident Oerident

The pandemic brought on many challenges for not only property managers but their residents as well. Property managers quickly shifted their attention to assist residents in creating payment plans and even helping people file for financial aid.

Taking care of their resident's needs and keeping them safe became imperative when the pandemic was at its peak. This need created a new trend of more empathetic and flexible property managers. This newfound attitude did not harm the profits but helped keep properties occupied and owners happy.

Better Communication

Property managers are communicating more proactively with clients than ever before. Clients want prompt communication, and property managers are using new creative ways and software to streamline it. When there is better communication between managers and clients, it opens up a whole world of opportunities for new services and benefits.

Instant messaging has taken over, leaving emails only for the most formal communications. Clients are contacted for quick decisions expediting matters. The need for better communication

was long overdue, and the COVID pandemic pushed it into high gear. Property managers have contacted clients about rent, payment plans, concessions, regulations, maintenance emergencies, and more. Clients have expressed their desire to continue this channel of instant communication indefinitely.

MORE SERVICES

Seeing how valuable property management is has made clients seek additional services from their property managers. Owners realized how tough collecting rent and leasing rental properties became during the pandemic, not to mention the ongoing changes to tenant-landlord legislation at a state and local level to remain in compliance with for their occupied properties.

Now they want to take advantage of these services and more. This situation has opened up a chance for property managers to expand their services. Some are already taking advantage of that by adding new services to their roster. They have specialized in evictions, cleaning, outdoor management, and more than your average rent collection and leasing units.

The growth in services means we might see more specialized property management firms. Firms specifically for single-family residential units or commercial multi-family units will become commonplace. That means owners will experience a more catered experience and more attention to their needs.

THE IMPORTANCE OF TECHNOLOGY

With the pandemic making life as we know it completely different, we had to find new ways to adapt to social distancing. The property management firms ahead of the curve regarding technology had the advantage.

Do you want to see the unit? Here is a virtual tour. The security guard isn't able to come in today? Don't worry since we have smart locks. So what if we have a hundred new clients to communicate with? Piece of cake with our CRM.

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 catalyzed tech startups that specialize in property management solutions.

Property management firms have no choice but to grow and advance their use of technology to fulfill clients' demands and follow local regulations. Owners wish to see financial data on demand without going through the property manager all the time. They can do that with an owner portal.

Technology became essential when property management team members were suddenly forced to work from home. The integration of technology into the day-to-day operations allowed property managers to operate their business throughout the pandemic. It also allows for the flexibility for remote working even after the pandemic dies down. This step is made possible with technological features like online payments, online property listings, electronic rent applications, online tenant interviews, resident portals, online leasing, and virtual property tours.

Not only are these advances making the job easier for property managers, but prospective and current tenants also enjoying the benefits of the technology. Everything from virtual tours to submitting a rental application and paying rent can now be done with the click of a button. New tenants love the option of virtual tours and leasing.

CREATIVE WAY TO EARN MORE

Property managers are looking at more creative ways to increase their incomes. Some property managers are hesitant to become responsible for more properties under the current economic circumstances. At the same time, owners are reluctant to buy more properties.

With this sort of standstill, property managers have opted to figure out more ways to make money creatively such as acquiring portfolios from retiring managers.

Thank You