



Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Business Objectives

- Build a **Fractional Real Estate Investment Simulation Platform** (Revaa) on Salesforce.
- Allow investors to **buy fractional shares** of real estate properties.
- Provide **ROI simulation tools** for investors before making decisions.
- Automate **rental income distribution** and **transaction recording**.
- Ensure **compliance** with KYC, taxation, and real estate regulations.
- Provide **dashboards and reports** for investors and admins.

Functional Requirements

- **Investor Management**
 - Onboard investors with KYC verification.
 - Manage investor profiles and ownership percentages.
- **Property Management**
 - Add, update, and maintain property details.
 - Track fractional ownership and availability.
- **Investment Transactions**
 - Record investments, payments, and ROI payouts.
 - Enable resale/exit functionality for investors.
- **Compliance & Security**
 - Enforce validation rules for KYC and financial checks.
 - Role-based access for investors, admins, and managers.
- **Simulation Engine**
 - ROI calculator for different investment scenarios.
 - Reports for historical and projected income.

Non-Functional Requirements

- Scalability to handle **thousands of investors and properties**.
- High security with Salesforce OWD, roles, and profiles.

- Mobile-friendly access via Salesforce mobile app.
- Integration capability with financial institutions.
- Low maintenance and cost-effective configuration.

2. Stakeholder Analysis

Stakeholder	Role	Interest/Needs	Influence Level	Pain Points
Investors	End Users	Easy onboarding, transparency, ROI clarity	High	Lack of trust, complicated processes
Property Managers	Manage properties	Simplified property listing & tracking	Medium	Manual property tracking
Platform Admins	Salesforce Admins	Control, configuration, compliance enforcement	High	Data security, high workload
Compliance Officers	Regulatory compliance managers	Ensure KYC, taxation, legal checks	High	Missing regulatory checks
Financial Partners	Banks, Payment Gateways	Seamless transactions, reconciliations	Medium	Delays in settlement
Real Estate Brokers	Secondary data providers	Provide listings and valuations	Low	Manual data exchange

3. Business Process Mapping

End-to-End Flow:

1. Property Acquisition

- Property manager lists a property on Revaa.
- Details like cost, expected rental income, and availability recorded.

2. Investor Onboarding

- Investor signs up → KYC verification → Profile created in Salesforce.

3. Fractional Investment Purchase

- Investor selects property → chooses fraction → invests money.

4. Rental Income Distribution

- Monthly/Quarterly rental income distributed proportionally.

5. Exit / Resale of Shares

- Investor resells share back to platform or another investor.

(Diagram to be created in Lucidchart/Draw.io and added later as Revaa_ProcessMap.png.)

4. Industry-Specific Use Case Analysis

Business Process Step	Salesforce Feature	Benefit
Investor KYC & Compliance	Validation Rules, Flows	Enforce KYC before activation
Property Portfolio Management	Custom Objects, Reports	Centralized view of all properties
Investment Simulation	Apex Logic + LWC	Dynamic ROI calculator for investors
Transactions & Ledger	Custom Object + Reports	Transparent investment records
Rental Payouts	Scheduled Flows / Apex	Automated periodic payouts
Resale of Shares	Custom Flow + Approval	Smooth investor exit process

5. AppExchange Exploration

Potential Relevant Apps:

1. Propertybase Real Estate CRM

- Real estate listing and CRM features.
- Cost: Paid, subscription-based.
- Relevance: Can integrate property listing module.

2. FinancialForce Accounting

- Cloud-based financial management on Salesforce.
- Cost: Paid (enterprise-level).
- Relevance: Useful for transaction and payout tracking.

3. **DocuSign eSignature for Salesforce**

- Digital signing of agreements and contracts.
- Cost: Paid, per-user license.
- Relevance: Investor agreements and property contracts.

4. **ComplianceQuest**

- End-to-end compliance and risk management.
- Cost: Paid.
- Relevance: KYC and compliance management.