PropertyCare CRM - Post-Sale Warranty & AMC Tracker

Industry: Real Estate

Project Type: B2C Salesforce CRM Implementation

Target Users: Property Owners, Service Agents, Property Managers

Problem Statement:

After purchasing a property, buyers often face difficulties managing warranty services, maintenance requests, and annual maintenance contracts (AMCs). Service teams struggle to track repair tickets, follow-ups, and expiring contracts, leading to poor customer satisfaction and missed SLAs.

To address this, the company wants to implement a Salesforce CRM to:

- Automate warranty and AMC tracking

- Manage maintenance requests and case assignments

- Track service agent activities and SLA compliance

- Provide real-time dashboards for management

Solution Overview:

PropertyCare CRM is a Salesforce-based system designed to streamline post-sale property management, improve resident satisfaction, and increase service team efficiency.

Key features:

- Warranty & AMC Management

- Maintenance Case Management

- Service Agent Management

- Reporting & Dashboards

Use Cases / Features:

- Warranty & AMC Management

  * Register property warranties and AMCs

  * Send automated reminders before expiry

  * Track warranty coverage

- Maintenance Case Management

  * Residents submit maintenance requests

  * Auto-assign cases to service agents

  * Track case status and SLA compliance

- Service Agent Management
  * Manage agent profiles and assignments
  * Track agent performance metrics

- Reporting & Dashboards
  * Open vs Closed Maintenance Cases
  * Expiring AMC/Warranty Dashboard
  * Agent Performance Reports
  * Monthly Maintenance Trends

- Notifications & Communication
  * Email alerts to property owners for AMC expiry or case updates
  * In-app notifications for service agents

Expected Outcomes:
- Residents get timely service and reminders for warranties/AMCs
- Service agents efficiently manage and resolve cases
- Management gains real-time insights through dashboards
- Improved customer satisfaction and operational efficiency

Placeholders:
- ERD Diagram
- Salesforce Objects, Flows, and Dashboard Screenshots