Salesforce Property Management App

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Phase 1 – Problem Understanding & Industry Analysis

1. Requirement Gathering

- **Business Goal:** Build a Salesforce app to manage rental properties end-to-end.

- **Primary Users (Stakeholders):**

  - **Property Owners / Landlords** → want visibility into rental income & tenants.

  - **Tenants / Renters** → need to pay rent, view agreements, and communicate with owners.

  - **Property Managers / Admins** → manage multiple units, track leases, generate invoices, collect payments.

  - **Finance Team** → track statements, reconcile payments, and manage refunds/security deposits.

- **Core Needs:**

  - Store tenant & owner information.

  - Track rental units and availability.

  - Manage rental agreements, deposits, renewals.

  - Generate monthly statements (rent invoices).

  - Record and process payments (credit card, bank).

  - Provide reports & dashboards for revenue, due balances, and lease expirations.

  - Enable chat/messaging between tenants and owners/managers.

2. Stakeholder Analysis

Stakeholder	Needs/Pain Points	Salesforce Solution
Property Owner	Wants income visibility, lease tracking	Dashboards, Reports, Owner Portal
Tenant	Easy rent payment, view agreements	Payment LWC, Portal/Community, Chat
Property Manager	Handle units, agreements, statements	Custom Objects (Rental Unit, Agreement, Statement)
Finance Team	Secure payment, reconciliation	Integration with Authorize.Net, Reports

3. Business Process Mapping

As-Is (Current Problems):

- Rent collection handled manually (cash, spreadsheets).

- Lease renewals tracked in Excel → prone to errors.

- Tenants must call/email owners for issues.

- Payment reconciliation takes days.

To-Be (Salesforce Solution):

1. Tenant applies → stored as **Contact**.

2. Rental Unit assigned.

3. Rental Agreement created (with deposits, rent amount, due dates).

4. Statement auto-generated monthly.

5. Tenant pays online via integrated **Payment Gateway**.

6. Finance dashboard updates in real-time.

7. Chatbox for instant communication (Tenant ↔ Owner/Manager).

4. Industry-Specific Use Case Analysis

- **Real Estate & Property Management** trends:
    - Automation of rent invoicing.
    - Digital payments integration.
    - Tenant self-service portals.
    - Real-time communication (chat/alerts).

Your app should **mimic SaaS platforms like Buildium, AppFolio, or Zillow Rentals**, but **inside Salesforce**.

5. AppExchange Exploration

Look at existing Salesforce apps for reference & inspiration:

- **PropertyBase** (CRM + Real Estate Management).
- **REthink CRM** (for real estate brokers).
- **Natterbox** (voice/chat integration).
- **SMS Magic** (chat/SMS integration).

You won't copy them, but you can borrow **best practices** for design.

Deliverables from Phase 1:

- Clear list of requirements (business + technical).

- Stakeholder personas defined.

- Business process mapped (manual → automated flow).

- Industry best practices reviewed.

- Final scope document prepared.