***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**

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| --- | --- | --- |
| **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 |
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**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.