

Project Title : Smart Property Portal CRM (Real Estate)

Problem Statement :

Real estate firms face fragmented tracking of buyer-tenant-owner interactions, manual leasing/sales workflows, and siloed post-move-in service, leading to:

- Long sales/leasing cycles due to manual site visit coordination, booking approvals, and contract processing.
- High error rates in inventory status, pricing updates, and lease data due to spreadsheet-based management.
- Low transparency for prospects and tenants on visit status, booking confirmations, payments, and service requests.
- Limited visibility into pipeline, occupancy, rent roll, and maintenance SLAs for decision-making.
- Absence of a centralized, scalable CRM with dashboards to manage multi-project portfolios across locations and teams.

Smart Property Portal CRM addresses these by delivering a Salesforce-based application that:

- Centralizes property, unit, listing, lead, lease, invoice, and maintenance data with real estate-specific objects.
- Automates site visits, bookings, approvals, rent invoicing, collections, and maintenance workflows.
- Provides Experience Cloud portals for tenants/brokers to track status, submit requests, and access documents.

- Delivers interactive dashboards and reports for portfolio, pipeline, occupancy, rent roll, and service performance.

Problem Understanding & Industry Analysis :

This phase analyzes the real estate customer journey, stakeholder ecosystem, and alignment with industry practices to baseline the solution scope and data model. Key activities mirror the reference structure and are tailored to real estate operations:

- **Requirement Gatherin :** Capture functional/non-functional requirements for lead-to-lease, property inventory, invoicing, and maintenance processes.
- **Stakeholder Analysis :** Define roles and needs for Sales/Leasing, Property Management, Finance, Brokers/Partners, Tenants/Buyers, and Management.
- **Business Process Mapping :** Map end-to-end flows: inquiry → site visit → booking → contract/lease → invoicing/collections → service/renewals.
- **Industry-Specific Use Case Analysis :** Align with residential/commercial leasing practices, deposits, approvals, escalations, and renewals.
- **AppExchange Exploration :** Identify add-ons for document generation, advanced search, field service, and communication to enhance the core build.