

# Phase 1

## RentEase Project Problem Statement

- **The Core Issue:** The current RentEase property management workflow is highly inefficient, relying on **fragmented and manual processes** that span critical areas like leasing, payments, and service requests. This operational disjointedness directly results in preventable revenue delays and administrative strain.
- **Key Pain Points and Impacts:**
  1. **Financial Inconsistency:** The reliance on manual tracking for rent and lease management results in **delayed collections, inconsistent application of late fees**, and a lack of transparent financial reporting for the Finance Team.
  2. **Poor Tenant Experience:** Tenants lack a centralized, self-service channel, forcing them to rely on phone calls and emails to track their payments and submit maintenance issues, leading to **low satisfaction** and slow resolution times.
  3. **Ineffective Decision-Making:** Key stakeholders, particularly the Property Manager, lack **real-time visibility** via unified dashboards into critical metrics such as **occupancy rates, outstanding revenue, and service performance**.
  4. **High Administrative Overhead:** Property managers and staff are burdened by excessive time spent on repetitive tasks, such as sending manual reminders and data reconciliation, diverting focus from strategic property management.
- **The Goal of the Solution:** To implement a **unified and automated property management system on the Salesforce Platform** ("RentEase"), which will centralize all data, automate financial workflows, enable a self-service tenant portal, and deliver immediate, actionable insights to management.

### 1. Requirement Gathering (Key Business Needs)

- **Data Structure:** Centralized Property catalog with Lease and Availability details.
- **Automation:** Streamlining the rental lifecycle (Inquiry to Closure).
- **Financials:** Dynamic Rent Management, late fee configuration, and automatic invoice generation (using Pricebooks/Automation).
- **Tenant Experience:** Providing a self-service portal (Experience Site).
- **Service:** Tracking maintenance requests and ensuring resolution via Service Cloud.
- **Communication:** Automated email/SMS notifications for rent, lease, and maintenance status.
- **Security & Reporting:** Implementing Role-Based Access and real-time dashboards (Occupancy, Revenue).

## 2. Stakeholder Analysis

- **Property Manager:** Needs full data access, administrative control, and reporting dashboards.
- **Tenant:** Needs portal access to view lease, make payments, and submit maintenance requests.
- **Maintenance Staff:** Needs access to assigned requests, ability to update status, and property information (Read-Only).
- **Finance Team:** Needs access to all Lease and Payment records for reconciliation and financial reporting.

## 3. Business Process Mapping

- **Rental Lifecycle:** Inquiry → Lease Creation → Agreement → Tenant Onboarding.
- **Payment Process:** Scheduled Invoicing → Due Reminders → Payment Receipt → Overdue Alert/Late Fee Application.
- **Maintenance Process:** Request Submission (Portal) → Automatic Assignment → Resolution Tracking → Closure Notification.

## 4. Industry-Specific Use Case Analysis

- **Challenge:** Fragmented property and tenant data.
  - **Solution:** Custom Objects and Master-Detail/Lookup relationships for centralized data.
- **Challenge:** Manual tracking of rent and lease renewals.
  - **Solution:** Flow Builder/Scheduled Jobs for automated financial and lifecycle processes.
- **Challenge:** Poor tenant self-service and communication.
  - **Solution:** Experience Cloud for 24/7 access and integrated notification alerts.

## 5. AppExchange Exploration

- **Payment Gateway:** Integration for direct rent payment processing via the portal (e.g., Stripe, specialized payment apps).
- **Document Generation:** Apps for creating professional, legal-compliant lease agreements from Salesforce data (e.g., Conga Composer, Document Generation tools).
- **Mapping/Visualization:** Tools to display property locations and occupancy rates visually.
- **Advanced SMS:** Dedicated apps for guaranteed delivery of critical rent/emergency alerts.