October 4 2025

Real Estate Management System

Final Presentation & Demo Day

Industry Challenges in Real Estate Management

The real estate industry faces significant hurdles, including **manual booking processes** that lead to inefficiencies, **limited agent visibility** which hinders performance tracking, and a **lack of automation and reporting** that obstructs data-driven decision-making. These challenges necessitate a robust management system for improved operations.
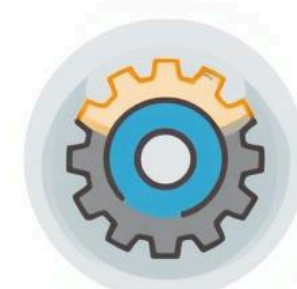

Industry Challenges

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Our Salesforce-Powered Solution Components

The Real Estate Management System leverages Salesforce to connect key objects: Property, Booking, Customer, and Agent. This integration allows for seamless interactions and enhanced user experiences through automation, ensuring efficient management of bookings and customer relationships while maintaining clarity in operations.
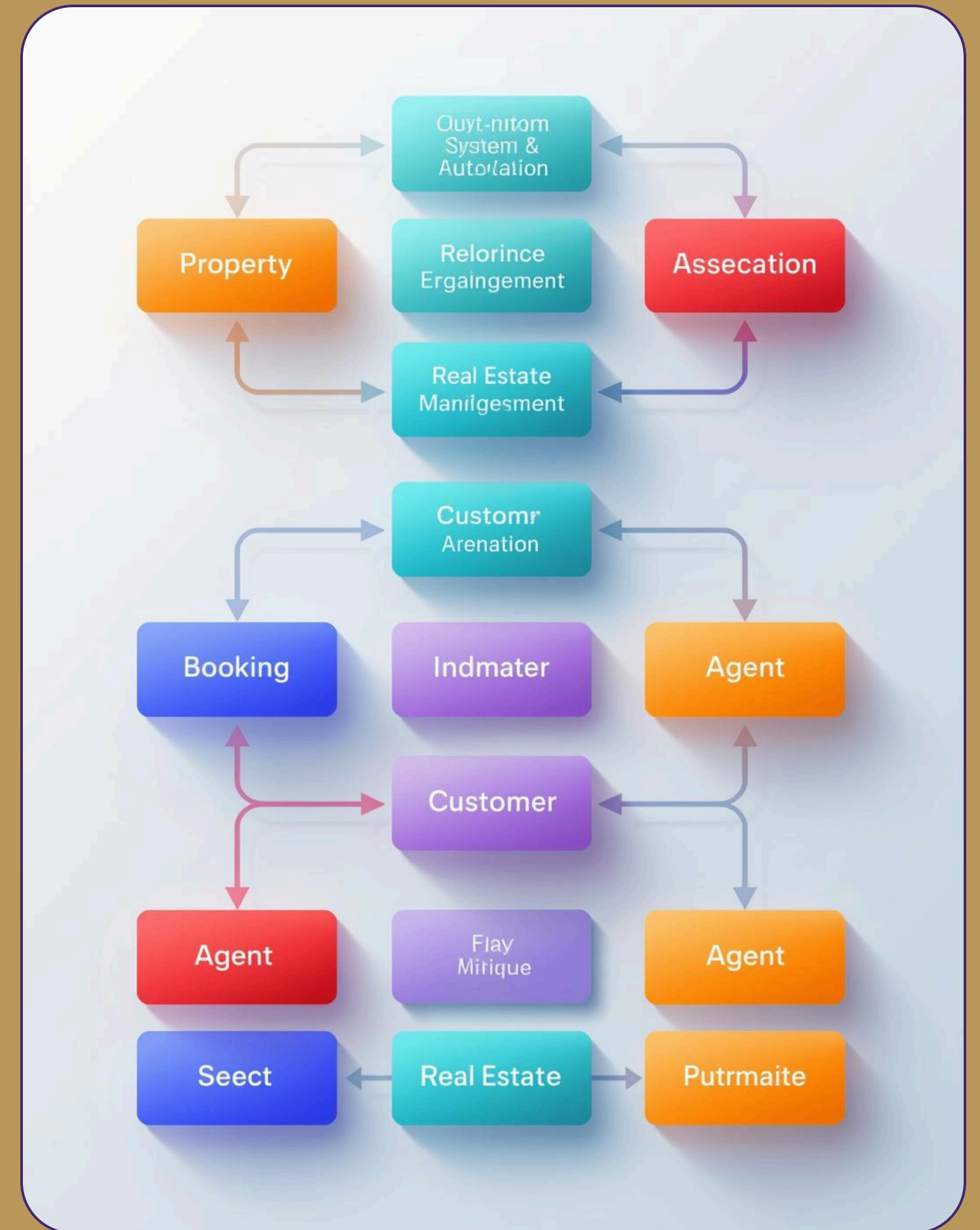
System Architecture: Object Relationships and Automations

The architecture of our Real Estate Management System is designed for optimal efficiency. It features key object relationships among Properties, Bookings, Customers, and Agents, integrated through automated workflows and Apex triggers. This setup ensures seamless interaction and real-time updates, enhancing user experience and operational effectiveness.

Real-Time Insights: Analyzing Key Metrics

This section showcases our comprehensive **reporting capabilities**, providing valuable insights into bookings by status, revenue per property, and performance metrics for top agents. By leveraging real-time data, stakeholders can make informed decisions and optimize their strategies for increased profitability and efficiency in the real estate market.
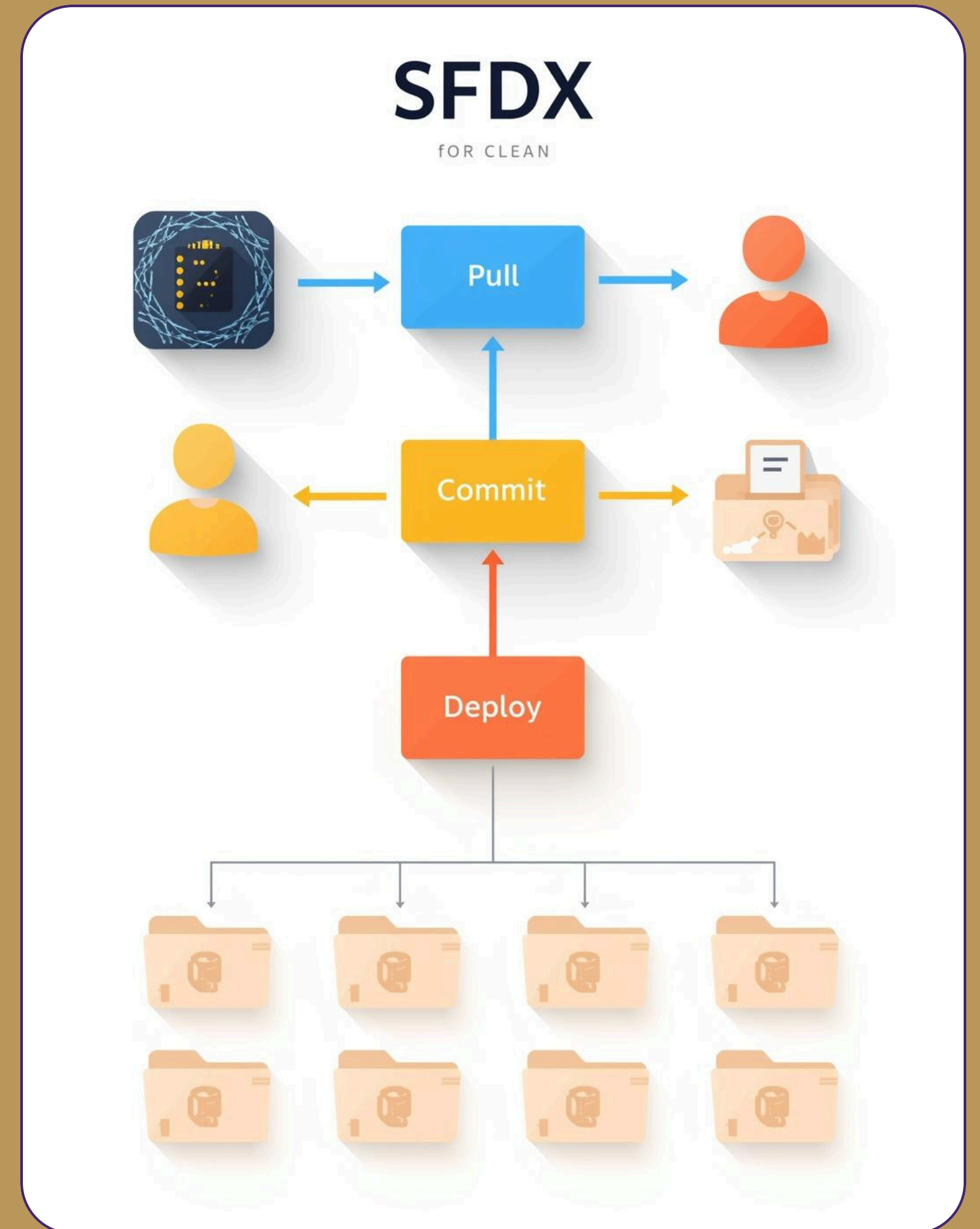
Built-In Security Measures for Our System

Ensuring robust security with multiple layers of protection for user data and system integrity.

- **Field-Level Security (FLS):** Restricts access to sensitive information based on user roles.
- **Validation Rules:** Ensures data integrity by enforcing specific criteria during entry.
- **Login IP Ranges:** Limits access to the system from specified, trusted locations only.
- **Session Settings:** Controls user sessions for enhanced security, including timeout settings.

Deployment Strategy: SFDX Workflow Overview

The deployment strategy utilizes the SFDX workflow, which streamlines the process through a structured approach of pull, commit, and deploy. This ensures efficient version control and collaboration. Additionally, the GitHub repository structure is organized for easy access to resources, including CSV templates for data import and management.

Project Handoff Documentation and Resources

Comprehensive guides and links for successful project handoff and deployment.

- Admin Guide: Detailed instructions for managing the Real Estate Management System.
- Deployment Guide: Step-by-step process for deploying the system using SFDX workflow.
- Test Cases: A collection of test scenarios to ensure system functionality and performance.
- GitHub Link: Access the repository for code, templates, and additional resources.

Let's Connect!

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