

Customized Partner Portal

Real Estate Investment Firm

Challenge

Amid rapid growth in the single-family rental market, the firm sought to enhance the investor experience through a seamless digital platform. Using Salesforce Experience Cloud, they built a partner portal to improve communication and collaboration. However, they faced two key challenges:

- They needed to assign properties to investors in sequential order and include maps in Salesforce-generated PDFs—functionality not natively supported.
- The firm wanted to store legal documents from residents in Salesforce, but limited file storage capacity posed a constraint.

Solution

TEKsystems Global Services explored several potential options to meet requirements. With our recommended solution, we:

- Used Google API to embed maps as images in Salesforce-generated PDFs.
- Developed a round-robin algorithm to assign properties sequentially to investors.
- Centralized document storage in Box to allow users to access the content without leaving Salesforce.

Throughout the engagement, TEKsystems collaborated closely with the customer to validate and refine the solution.

Results

TEKsystems Global Services developed an innovative solution to meet the customer's unique requirements. The customized portal enabled the firm to:

- Share complete property details—including maps—in a single PDF.
- Allocate properties equitably among investors.
- Store and access all documents (e.g., leases, resident info, assessments) in one location via Box.

The holistic and unified partner portal enabled the firm to fully embrace its service-minded philosophy and expand to new markets.

Streamlined processes

to better support investors.