**Solution overview: -**

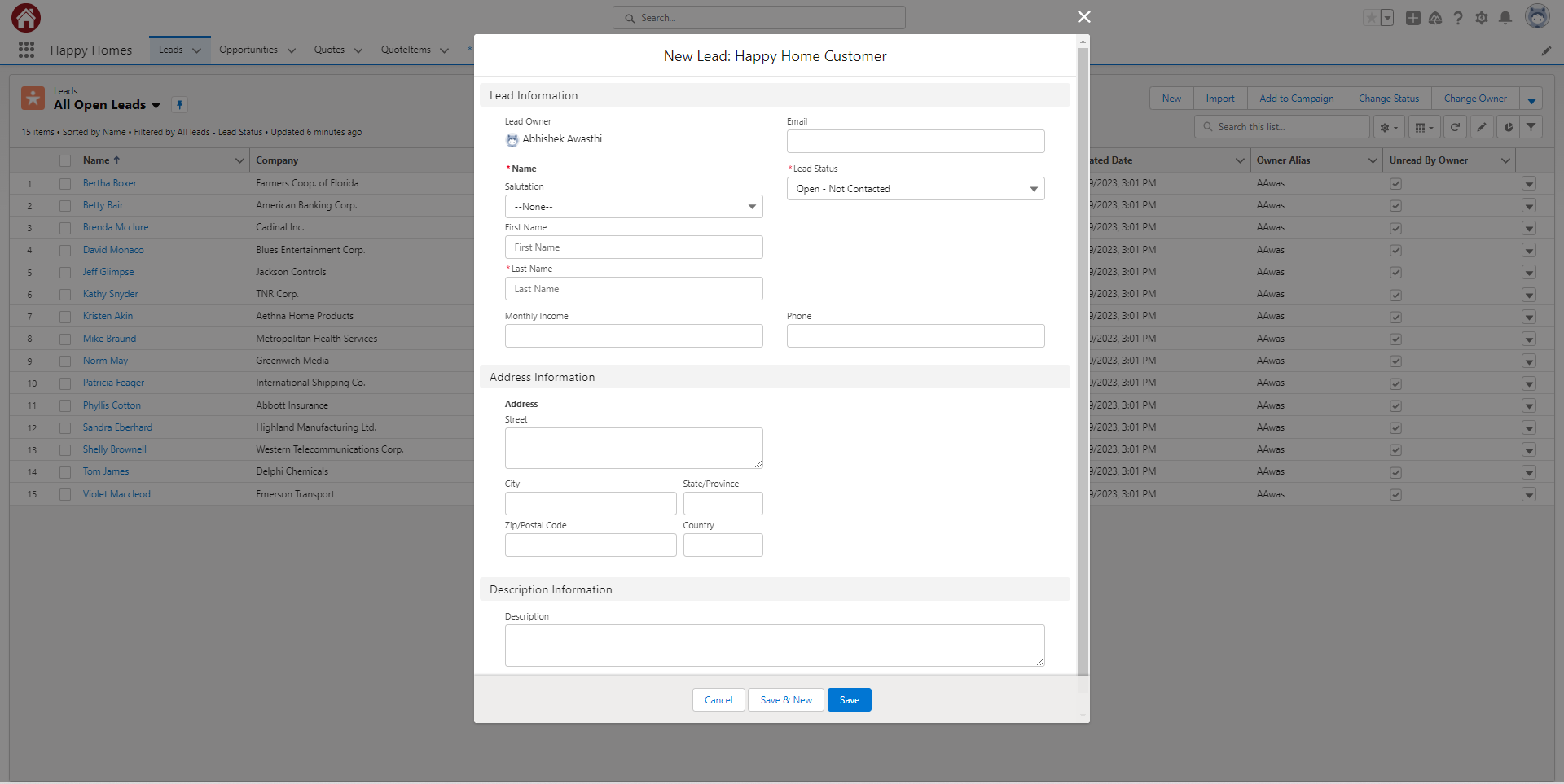
Login Details : Username : [orderbirdsales@orderbird.com](mailto:orderbirdsales@orderbird.com)

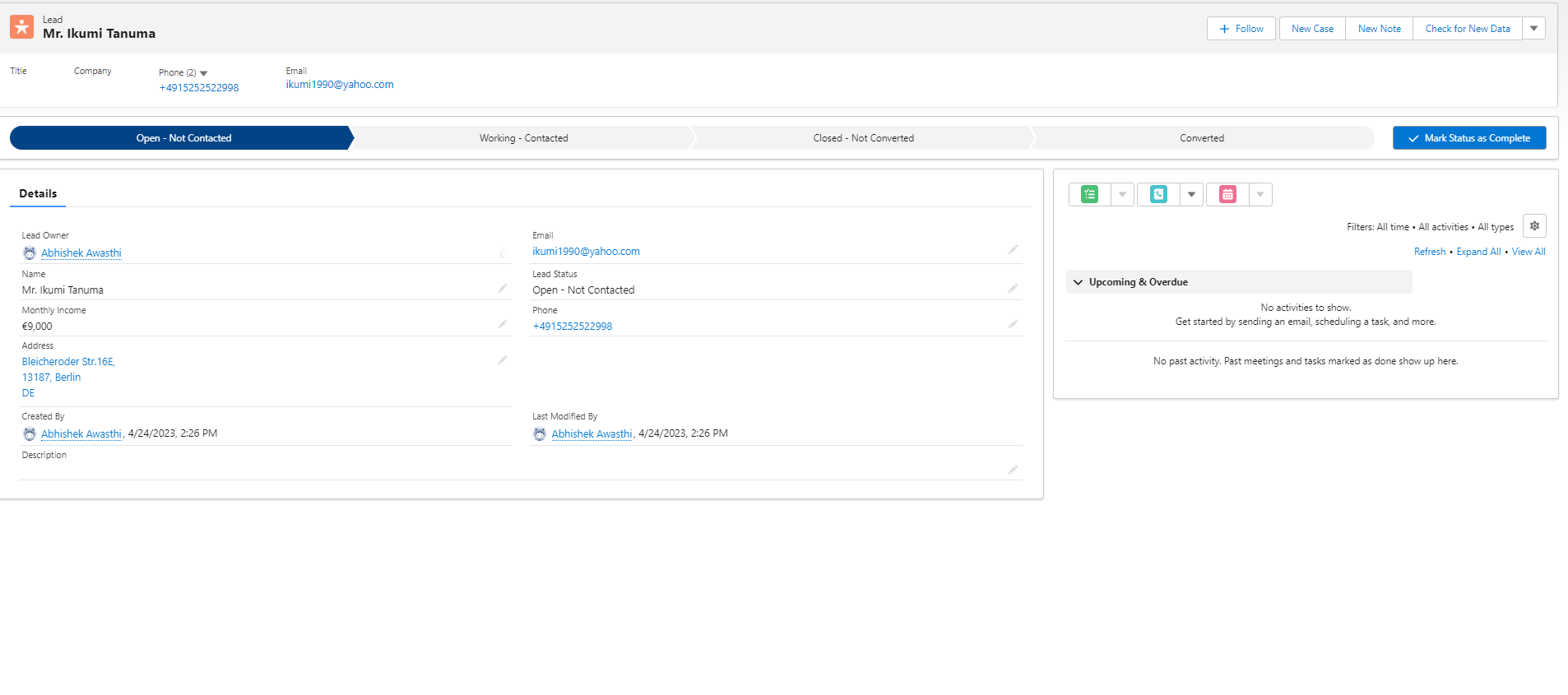
Password : pass@123

**1 – Application flow**

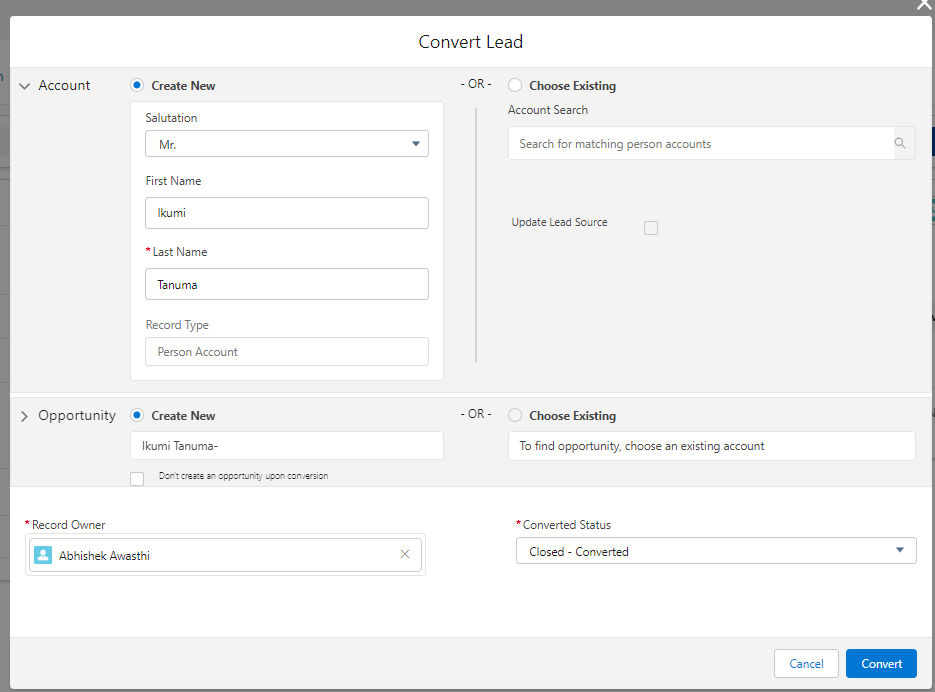
The application flow starts with capturing incoming lead information using the lead object. For simplicity, we gather basic user details such as Name, Email, Phone number, and Monthly Income.

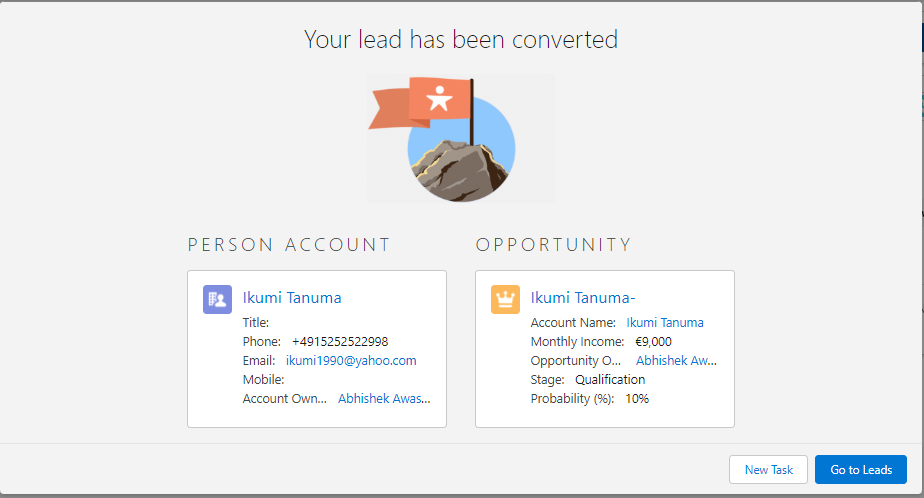
The sales process consists of four stages: Open - Not Contacted, Working - Contacted, Closed - Converted, and Closed - Not Converted. During the lead nurturing process, the lead moves to the working contact stage, where sales reps engage with the lead and gather more information to help move the lead towards the closed-converted stage.



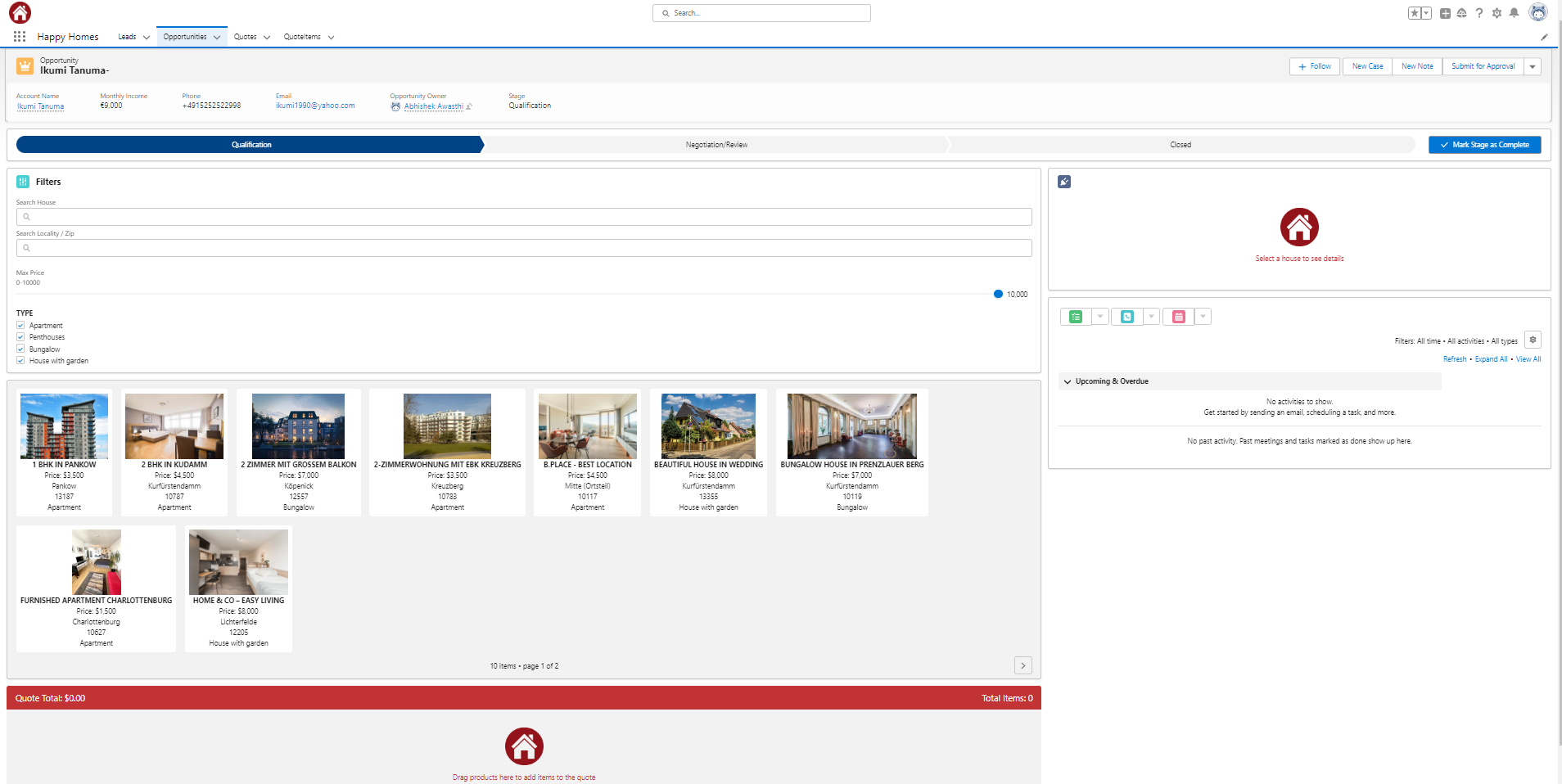


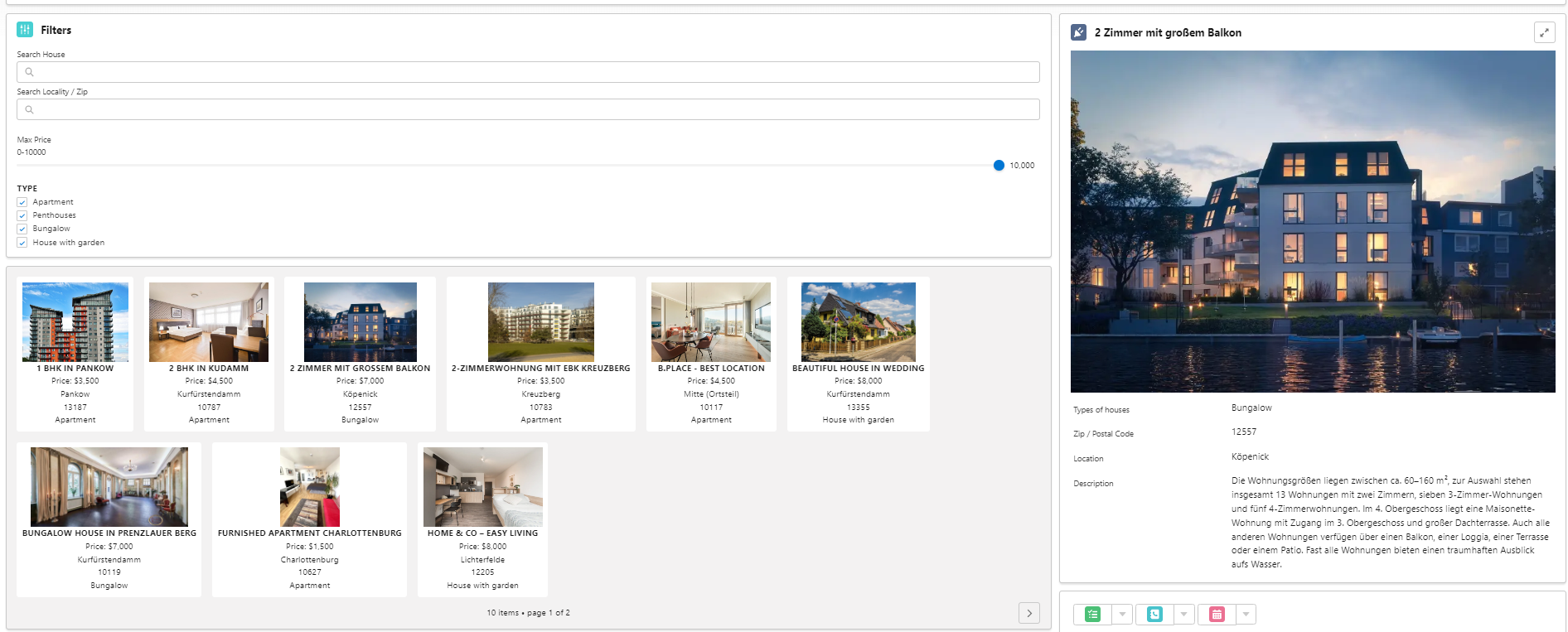
After a lead is successfully converted, we create a person account along with an opportunity. This allows us to efficiently manage and track the sales process from lead to customer.



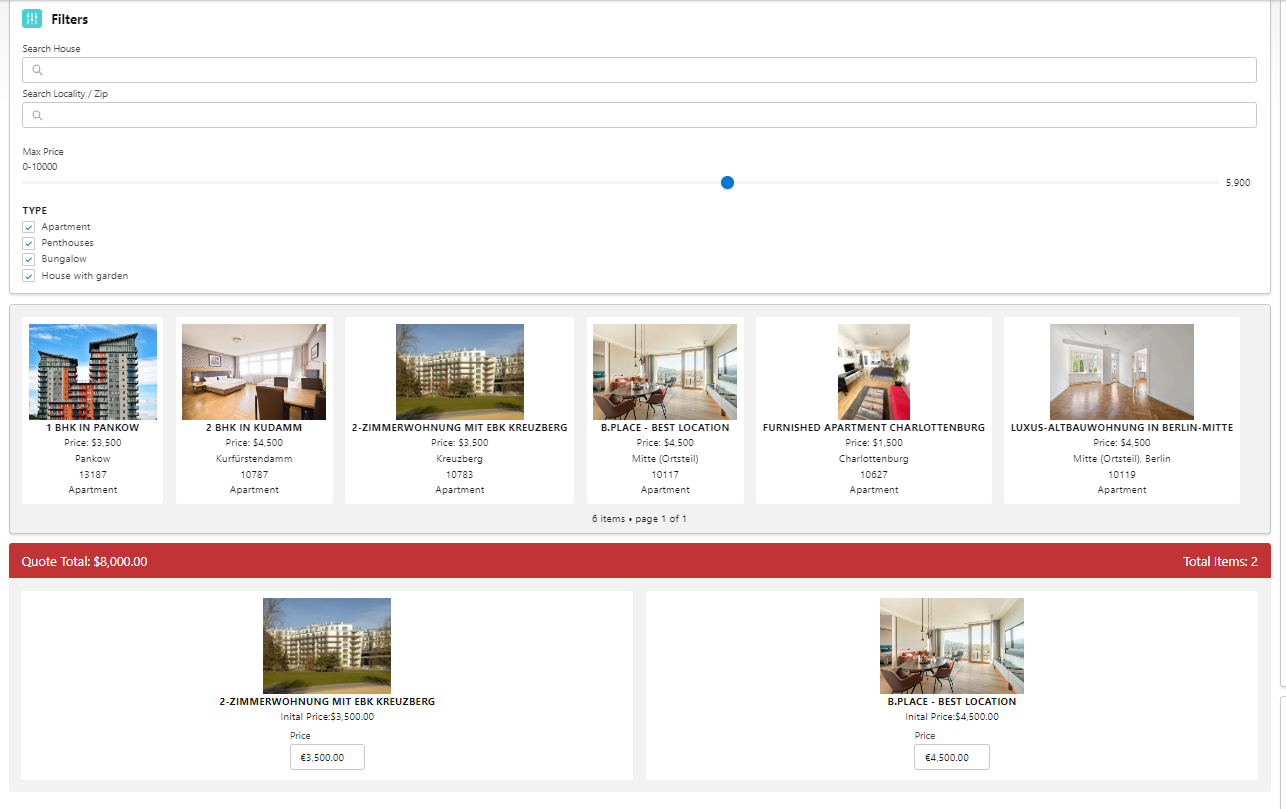


We've enhanced the opportunity page by adding a custom Lightning web component that provides a seamless user experience. The component includes a set of filters that allow users to search for listings by Name, Zip/Location, and Type of Listing. Additionally, users can set a maximum price for their search criteria. Once a user selects a listing, they can view more details about the property in a right-side panel.

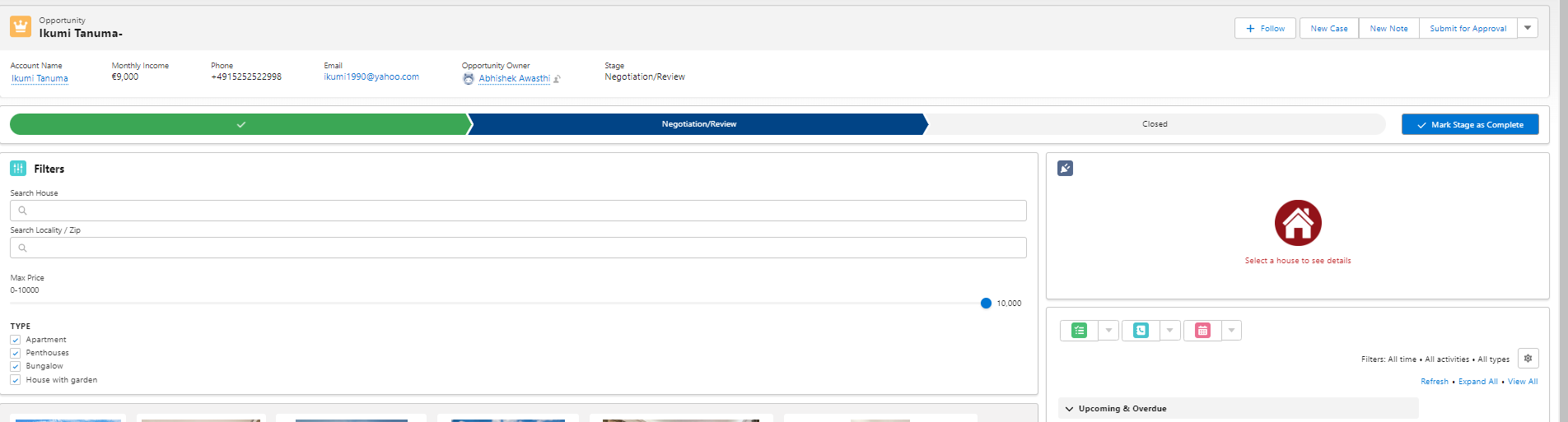


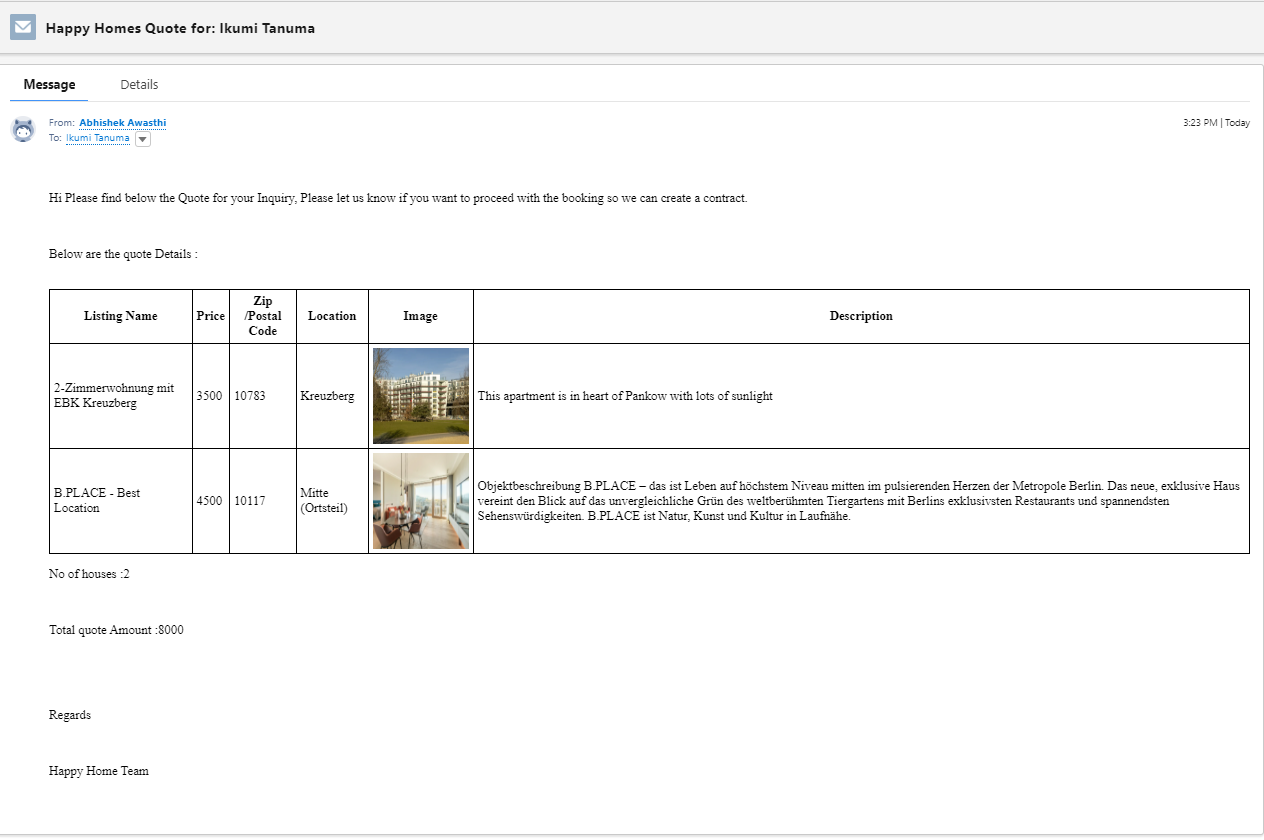
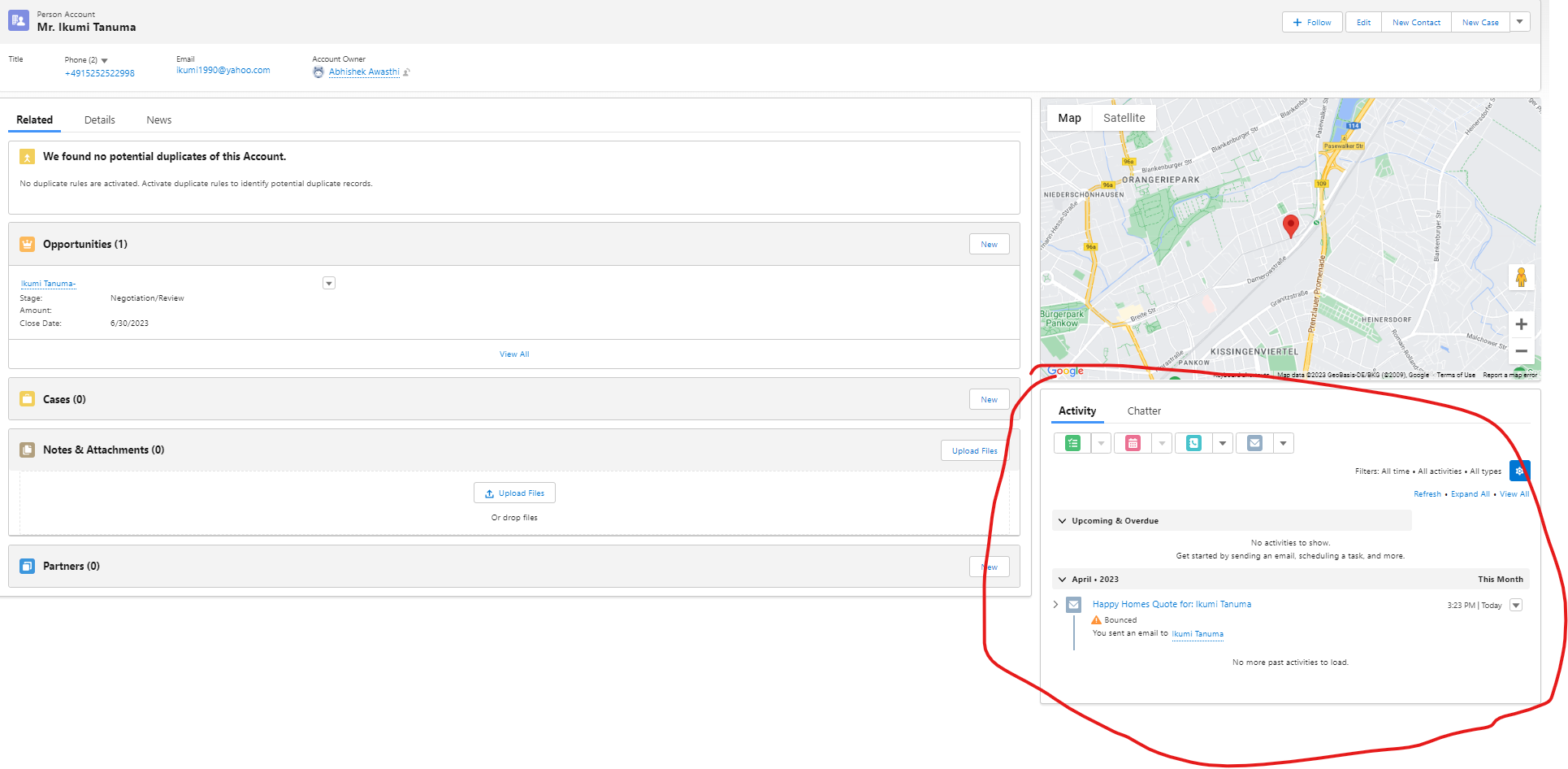


Once the user finds a property they're interested in, they can easily add it to their quote (Opportunity) by dragging and dropping it into the cart. This feature simplifies the process of building a quote, allowing users to easily keep track of the properties they are considering.

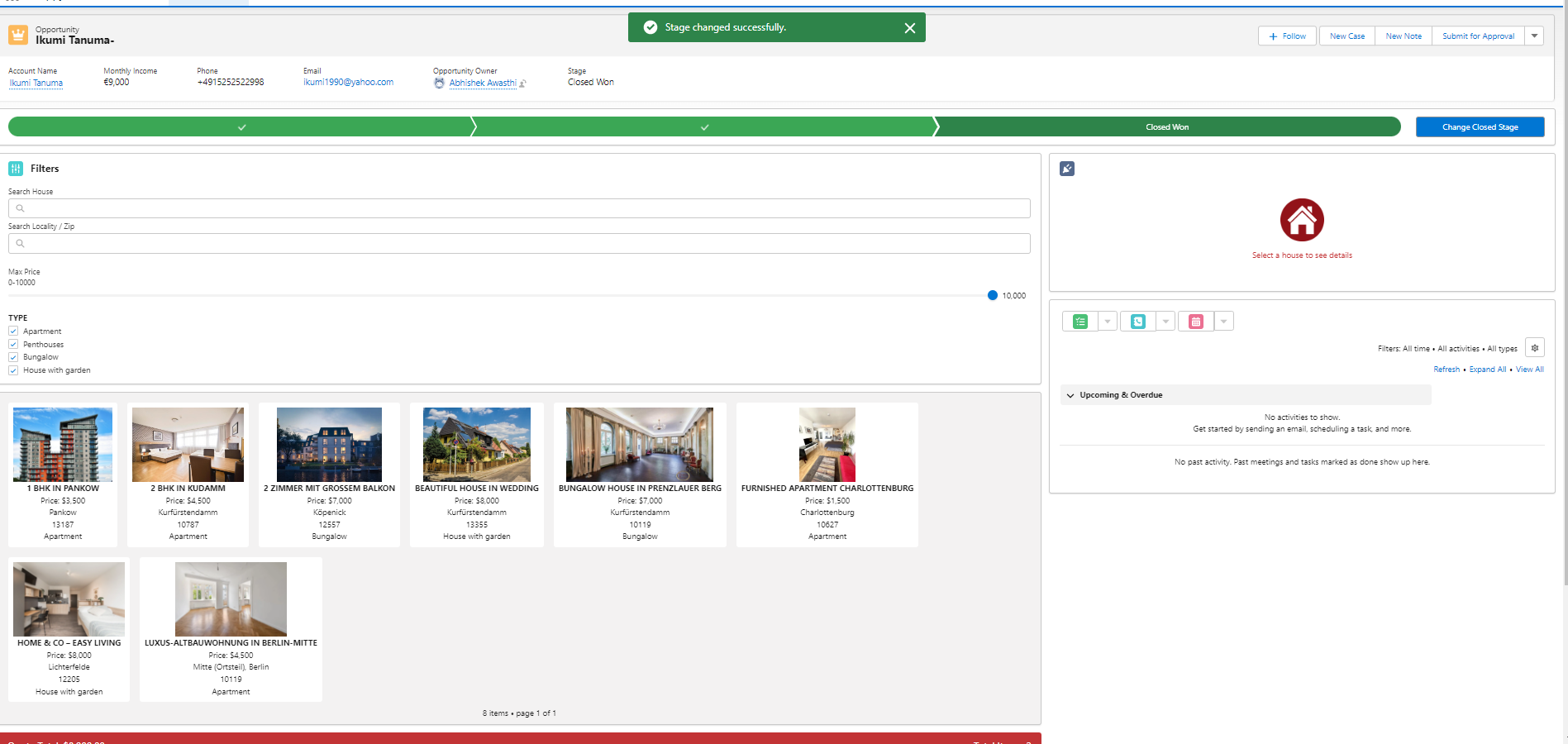
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Once the user has finalized their quote, they can move the opportunity to the Negotiation/Review stage. At this point, the sales team can review the quote and negotiate any terms or pricing adjustments as necessary.

****As soon as the opportunity is moved to the Negotiation/Review stage, we automatically send an email notification to the customer. This email includes all the relevant details of the quote and serves as a confirmation that the negotiation process has started. We also save a copy of the email as an activity in the customer's account, which can be easily accessed and reviewed at any time.



The final step is to mark the opportunity as either Closed Won or Lost based on the response from the customer. If the opportunity is marked as Closed Won, the quote is considered finalized, and the products included in the quote are no longer available to be added to any future quotes. This effectively removes them from inventory. If the opportunity is marked as Lost, the products are still available for future quotes, and the sales team can follow up with the customer to understand why the opportunity was lost and if there are any other properties they may be interested in.



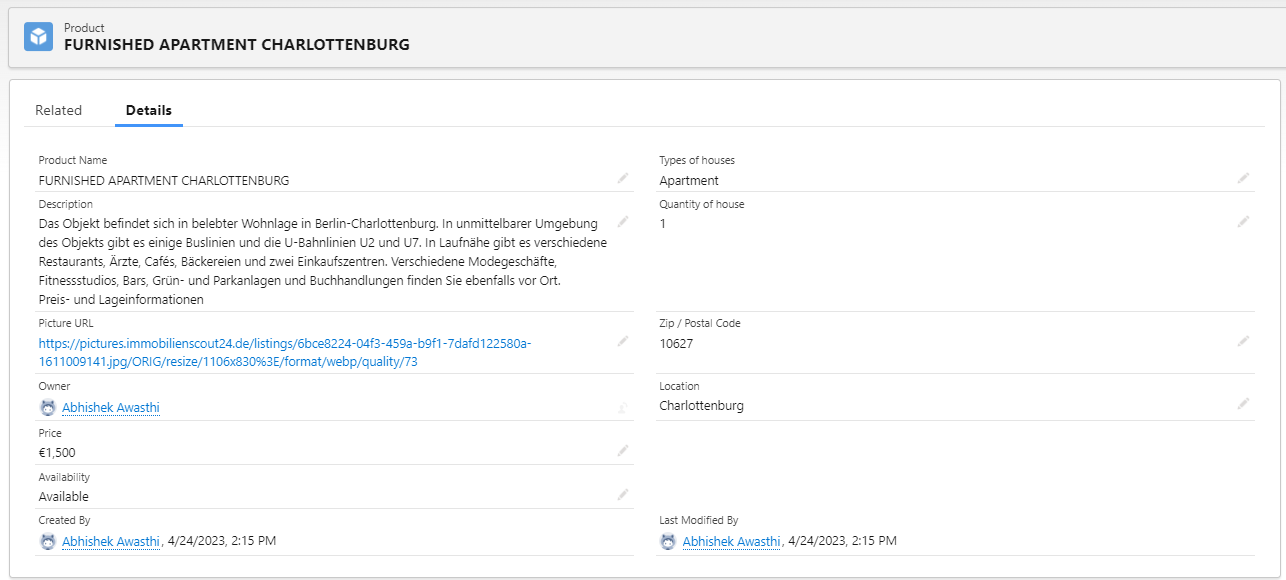
**Important Note:** Although the assignment requested adding quantity, I have chosen not to include it, as it does not make sense for the products being sold in this scenario. Specifically, in the case of houses, each unit is a unique product, and there are no options to purchase multiple units together in bulk. This is unlike smaller products on retail websites, where quantities are often listed and purchased together. When multiple units of a house are available, they are typically listed separately on real estate websites and not sold together in bulk.

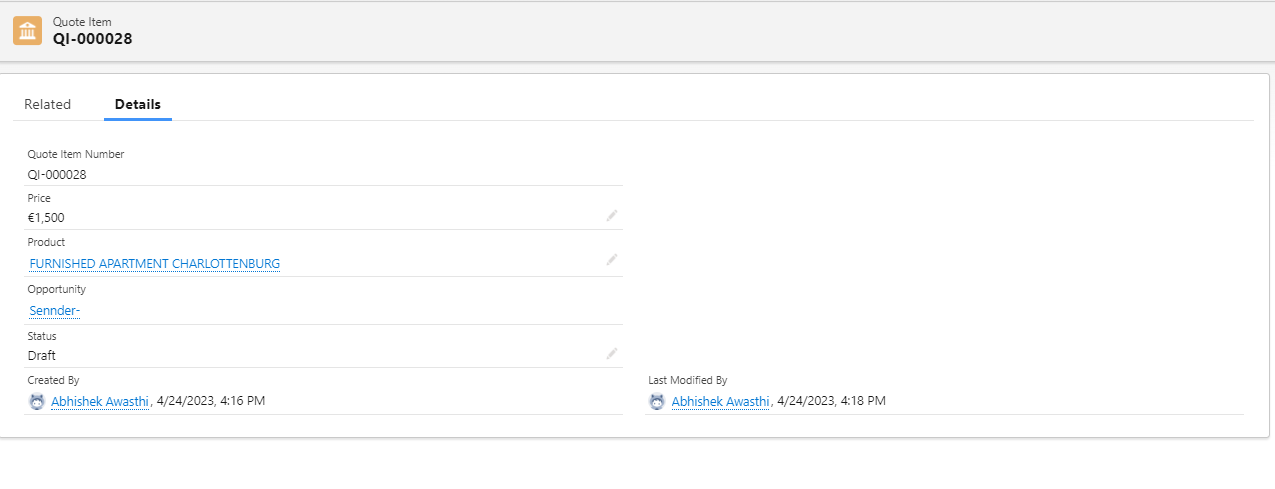
**2 – Data Model**



The entire solution consists of three standard objects Lead, Person Account, and Opportunity and two custom object Product\_\_c and Quote\_Item\_\_c. As shown the opportunity has master detail relationship with Quote Item and Product has lookup relationship with Quote item .

Below are the sample layout and fields that are part of quote and product





**3 – Automation**

Below are the details of flows and Trigger that are added as part of solution.

Flows: -

[Update Quote Line Item Status](javascript:void(0);) - Updates the quote item status based on status of opportunity.

[Update Product Availability](javascript:void(0);) - Updates the Product availability based on the status of quote item (accepted / rejected)

Trigger: -

OpportunityTrigger: - A trigger on opportunity after update is used to send the email to the customer along with details of the quote

**4 – Lightning Web Component**

The 4 major lighting web components are as below

**houseFilter** - used to filter the listing on home tile list

**houseOrderBuilder** - used to drop home tile to add a product to quote. This component also inserts the quote item record.

**homeCard** - used to display details of the listing on right side panel

**homeTileList** - used to display all available listings on opportunity page . displays 9 items per page with pagination to navigate more items

**Few important points: -**

• The entire code base has been added to a git repository, and a compressed zip folder has also been included for convenience. The repository can be found at <https://github.com/AbhishekAwasthi/HappyHome>.

• Please note that there are many potential validation scenarios that could be added but due to time constraints, not all of them have been included in this implementation. If you have any questions about these validation scenarios or if there are additional requirements, please let me know during the review process.

• Throughout the solution design process, a number of assumptions were made to create a viable project. These assumptions exclude the optimal sales process stage, input restrictions, and downstream system integrations. In a real-world scenario, these assumptions would be clarified beforehand to ensure the best possible outcome.

• If you have any questions or require clarification regarding this solution, please do not hesitate to contact me at [abhishawasthi@gmail.com](mailto:abhishawasthi@gmail.com). I am happy to jump on a quick call to discuss this project in further detail.