

TourFlow: Real Estate Tour and Feedback Automator

Phase 2: Org Setup & Configuration

1. Salesforce Org Creation

- Signed up for a free Salesforce Developer Edition org to use as the primary development environment.
- Confirmed login and navigation to the Setup menu.

2. Security and Profile Setup

Established a clear security model by defining three key user profiles:

- Real Estate Agent Profile: For the app's primary end-users.
- Real Estate Manager/Broker Profile: For supervisory roles needing broader data visibility.
- Admin Profile: Admin with full permissions to build and customize the app.

3. Data Model Creation

Custom Objects

- Client: This object holds all the information about your customers, such as their name, email, and phone number.
- Property: This object stores details about the real estate listings, including the address, listing price, and current status.
- Tour: This object is the central link between a client and a property. It tracks the details of each visit.

Custom Fields

- Client Object: Email and Phone.
- Property Object: Address, Listing Price, and a picklist for Status (with values like 'Available' and 'Sold').
- Tour Object: Tour Date, Feedback Notes, and a picklist for Client Interest and also created lookup fields to link the Tour to a Client and a Property.

4. App and Tab Creation

- Created a new Lightning App named “TourFlow”.
- Created custom tabs for each of the three custom objects.
- Set tab visibility correctly for the Admin, Agent, and Manager profiles to ensure only relevant users see the tabs.
- Included essential standard tabs like Home, Reports, Dashboards, and Files to create a comprehensive and functional app for the agent.