TourFlow: Real Estate Tour and Feedback Automator

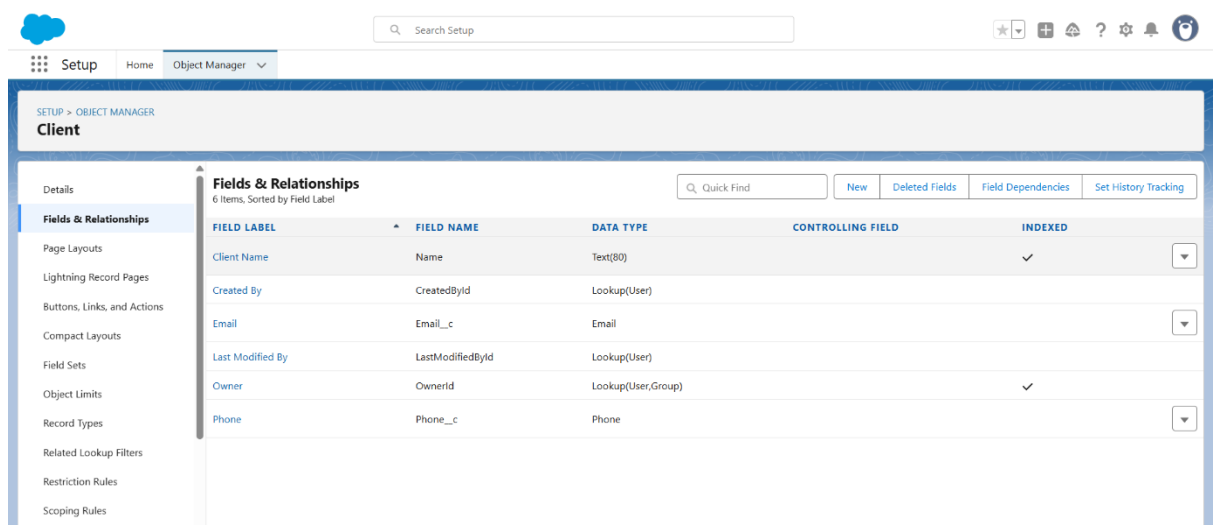## Phase 3: Data Modeling & Relationships

1. Standard & Custom Objects

- **Standard Objects:** Account, Contact, Opportunity, Lead used where necessary for business processes.
- **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.
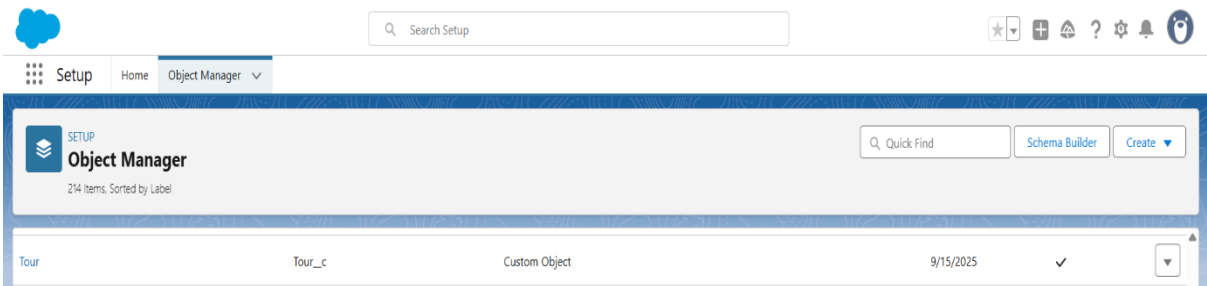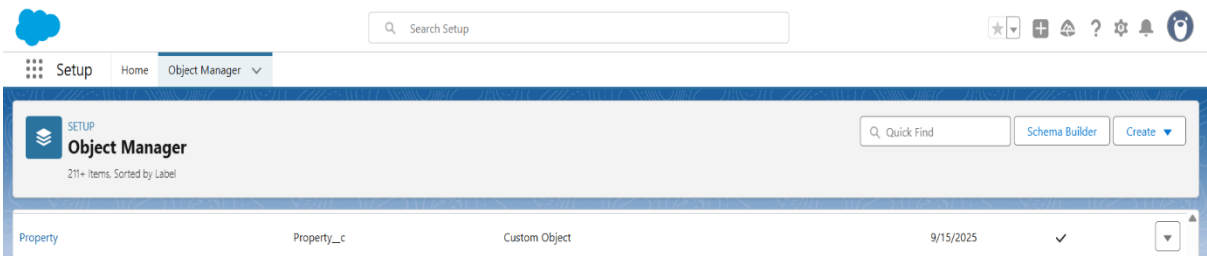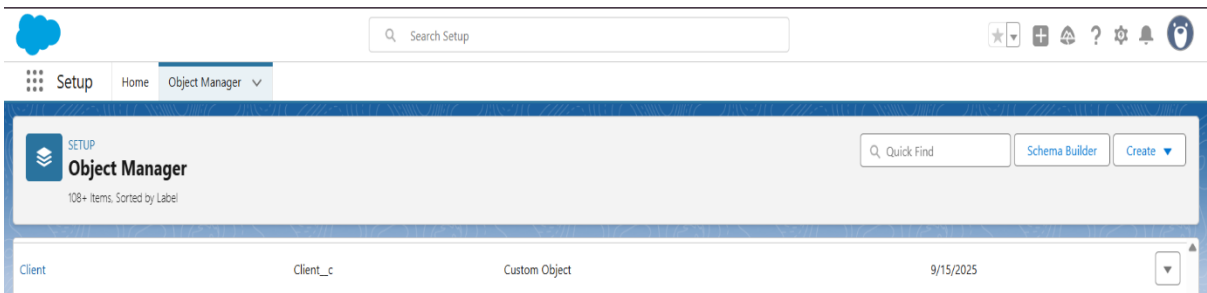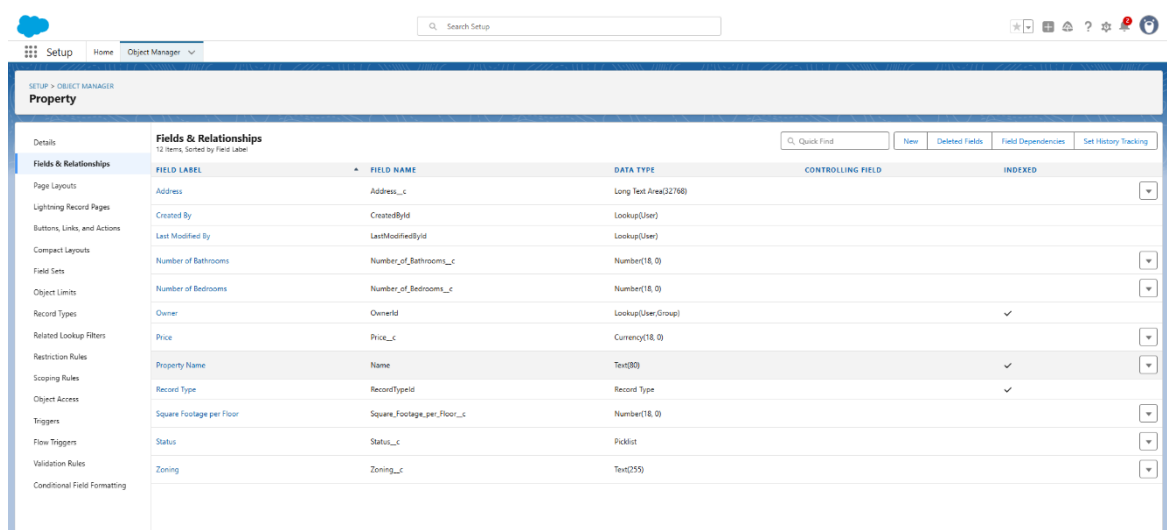
2. Fields

- Client Object: Email and Phone.

- Property Object: Address, Listing Price, Number of Bedrooms, Number of Bathrooms, Zoning, Square feet 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.
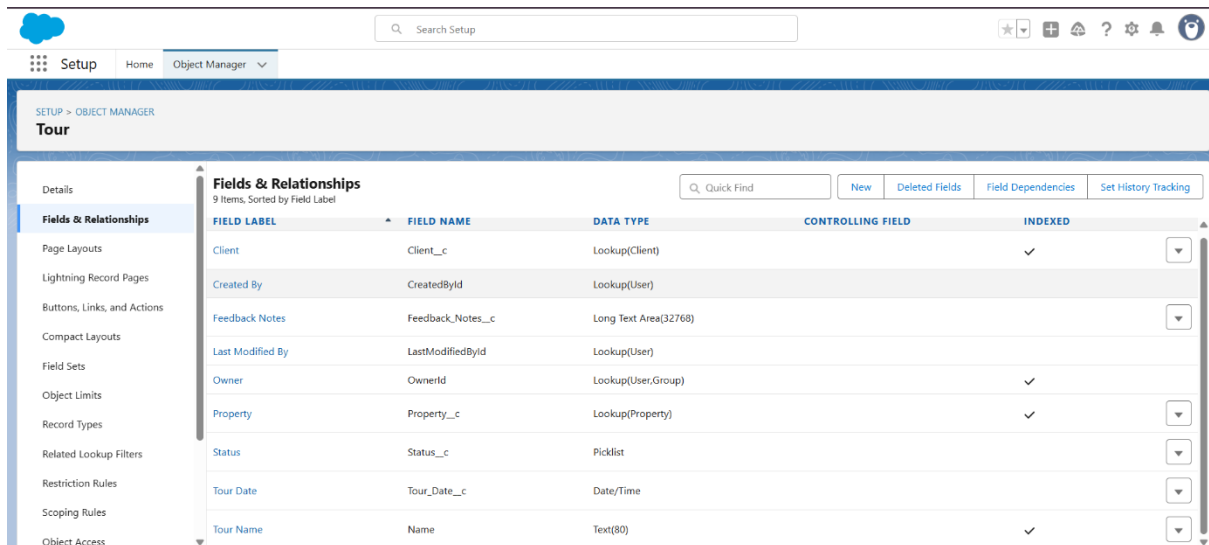
3. Record Types

- **Property Object – Residential: It is** Record type for residential properties.
  Assigned Residential Layout

- **Property Object – Commercial:** Record type for commercial properties.
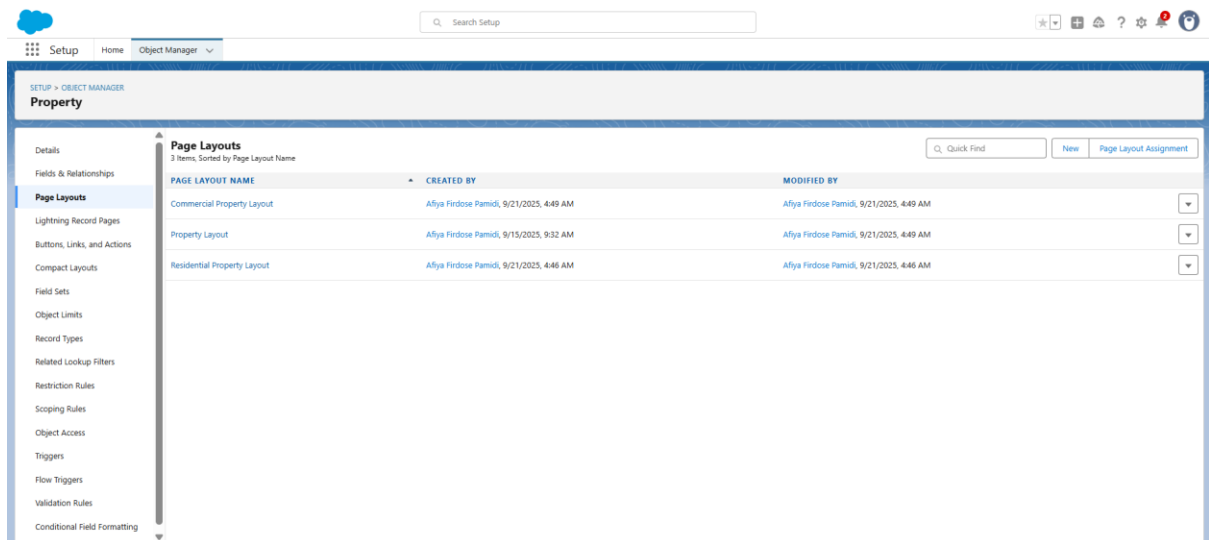 Assigned Commercial Layout

4. Page Layouts

- **Residential Layout (Property):** Displays relevant fields for residential properties,
  including property name, location, price, and owner. Assigned to Residential Record
  Type and applicable profiles.

- **Commercial Layout (Property):** Displays fields relevant to commercial properties.
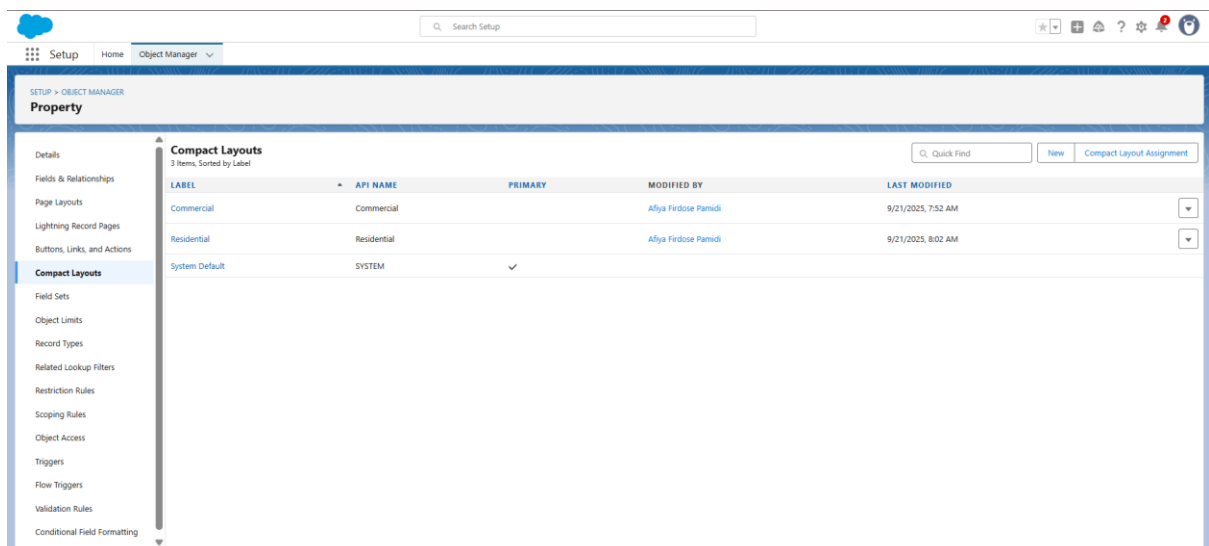 Assigned to Commercial Record Type and relevant profiles.

5. Compact Layouts

- **Residential Compact Layout:** Shows key fields (Property Name, Price) for residential properties in the highlights panel. Set as primary for Residential Record Type.

- **Commercial Compact Layout:** Displays key fields (Property Name, Price) for commercial properties. Set as primary for Commercial Record Type.
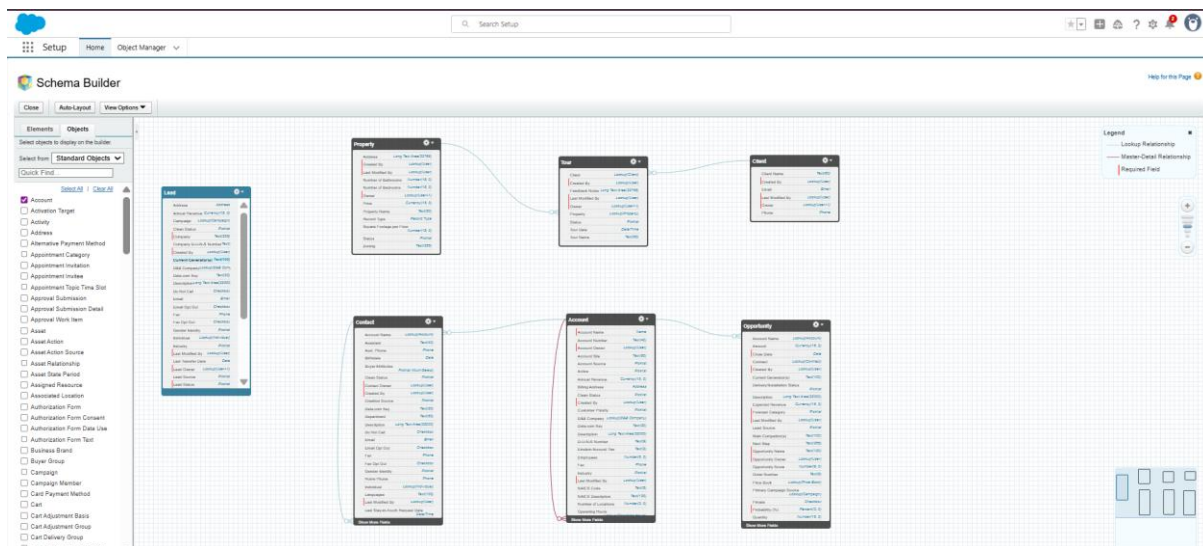
6. Schema Builder

- Utilized Schema Builder to visualize objects, fields, and relationships.
- Verified that all lookups, record types, and compact layouts are correctly configured.

7. Relationships

- **Tour → Client (Lookup Relationship):** Each tour is linked to a specific client while maintaining independent ownership.
- **Tour → Property (Lookup Relationship):** Each tour is linked to a specific property while maintaining independent ownership.