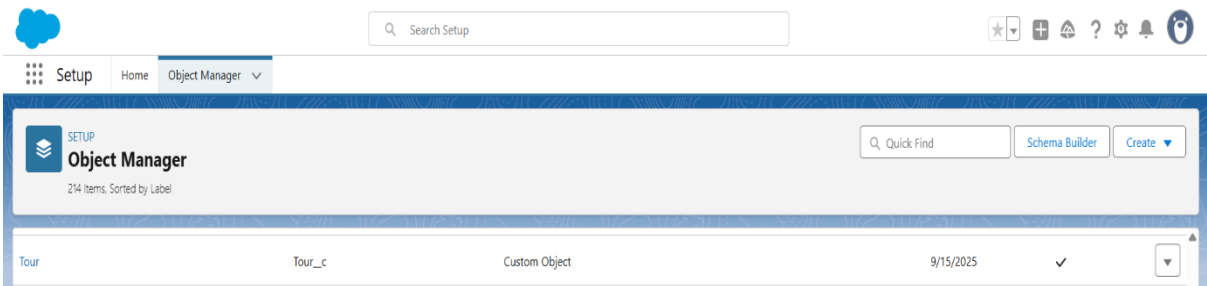
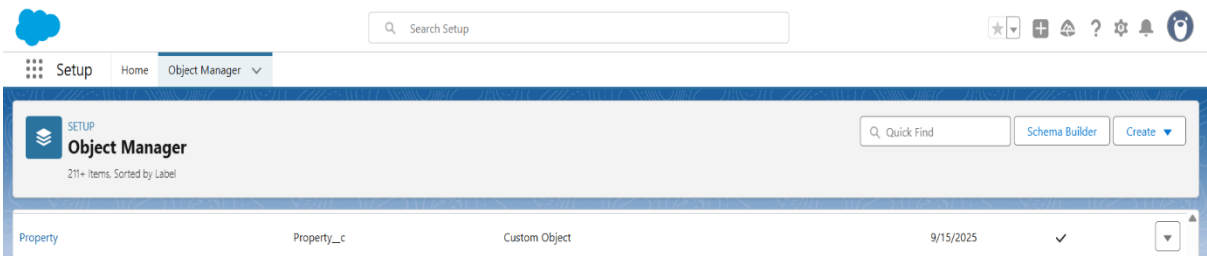
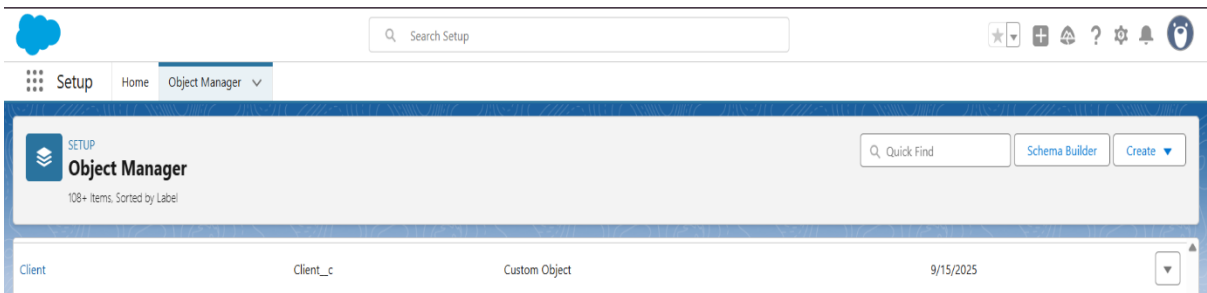


TourFlow: Real Estate Tour and Feedback Automator

Phase 3: Data Modeling & Relationships

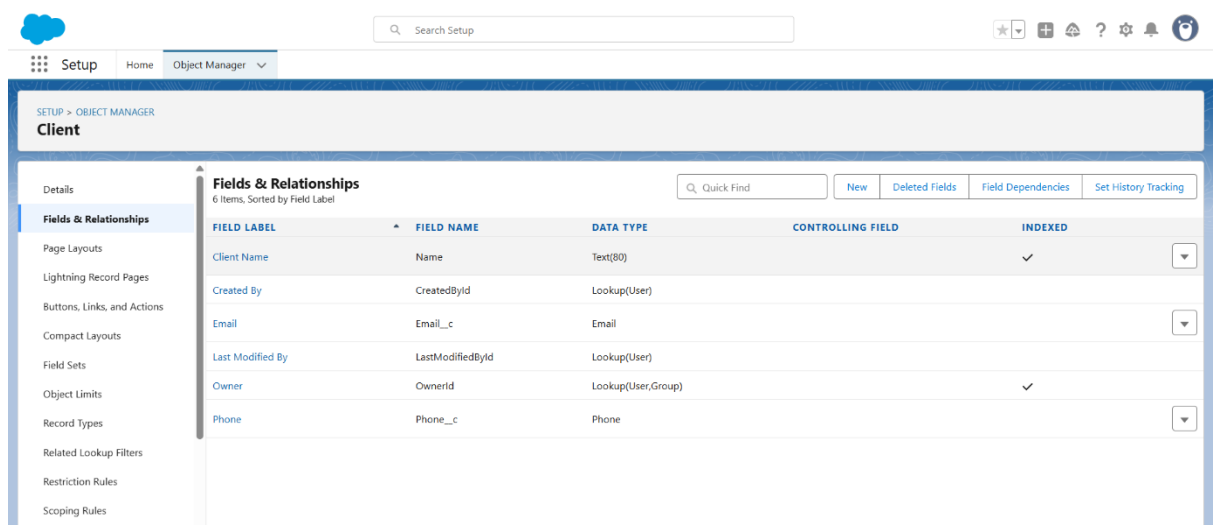
1. Standard & Custom Objects

- **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.



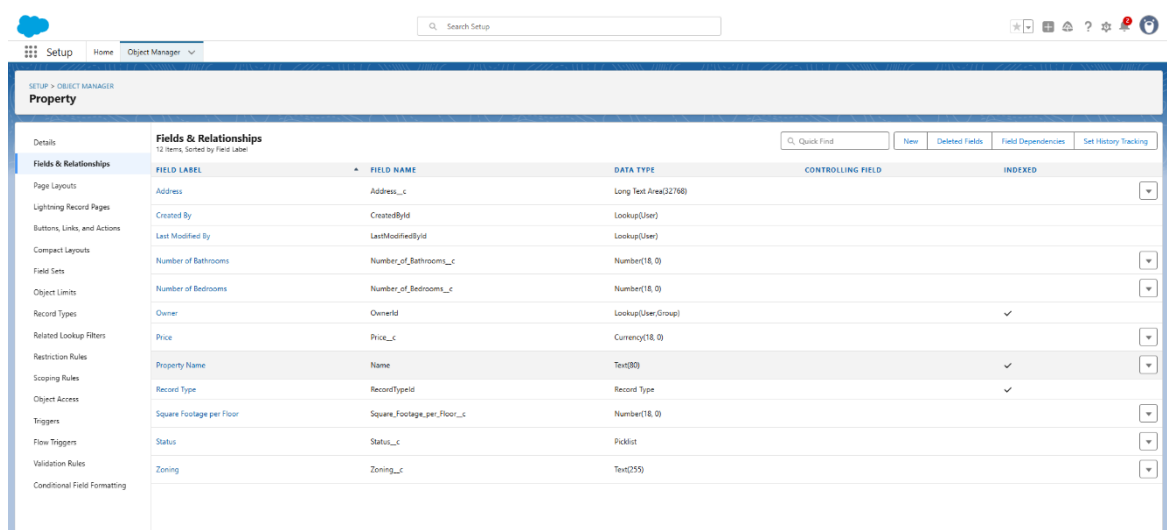
2. Fields

- 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.



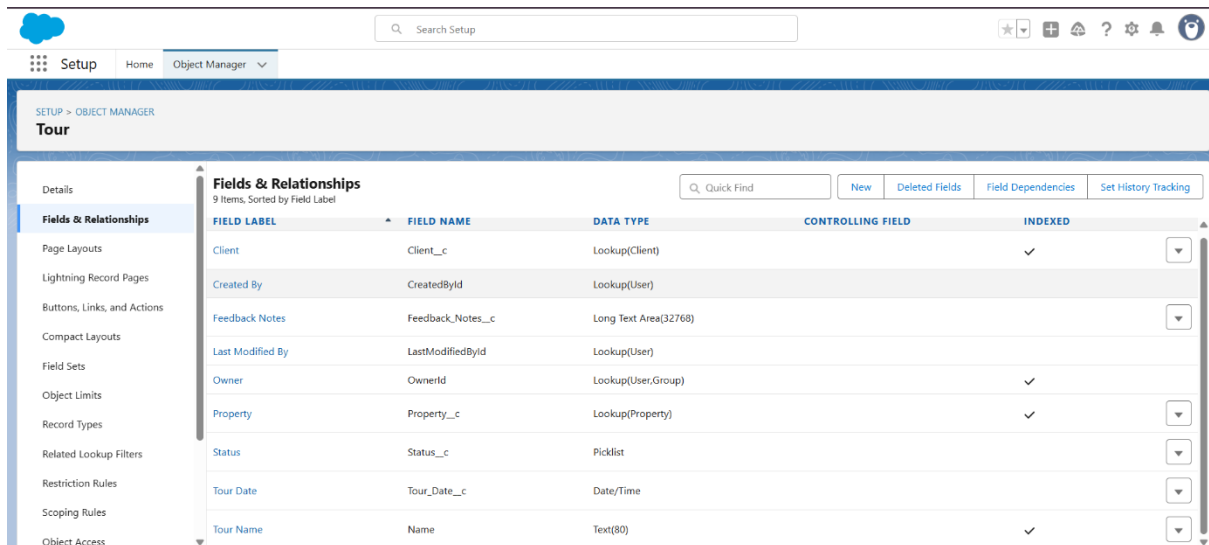
The screenshot shows the Salesforce Setup interface for the 'Client' object. The 'Fields & Relationships' section is active, displaying a table of 6 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Client Name, Created By, Email, Last Modified By, Owner, and Phone.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Client Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		



The screenshot shows the Salesforce Setup interface for the 'Property' object. The 'Fields & Relationships' section is active, displaying a table of 12 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Address, Created By, Last Modified By, Number of Bathrooms, Number of Bedrooms, Owner, Price, Property Name, Record Type, Square Footage per Floor, Status, and Zoning.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Bathrooms	Number_of_Bathrooms__c	Number(18, 0)		
Number of Bedrooms	Number_of_Bedrooms__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(18, 0)		
Property Name	Name	Text(80)		✓
Record Type	RecordTypeId	Record Type		✓
Square Footage per Floor	Square_Footage_per_Floor__c	Number(18, 0)		
Status	Status__c	Picklist		
Zoning	Zoning__c	Text(255)		



SETUP > OBJECT MANAGER

Tour

Details

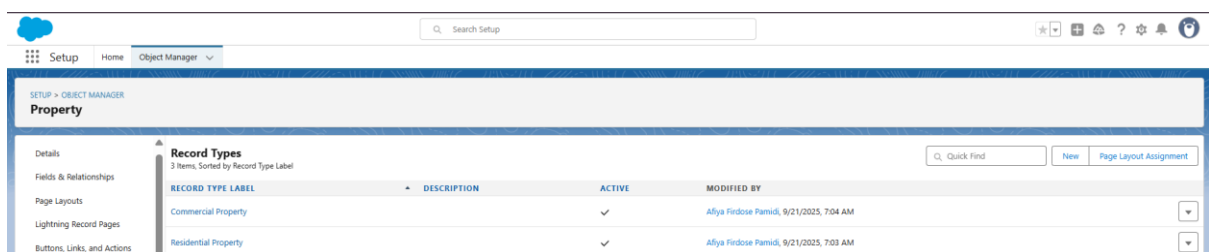
Fields & Relationships
9 Items, Sorted by Field Label

Quick Find: [] New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Client	Client__c	Lookup(Client)		✓
Created By	CreatedById	Lookup(User)		
Feedback Notes	Feedback_Notes__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Property	Property__c	Lookup(Property)		✓
Status	Status__c	Picklist		
Tour Date	Tour_Date__c	Date/Time		
Tour Name	Name	Text(80)		✓

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



SETUP > OBJECT MANAGER

Property

Details

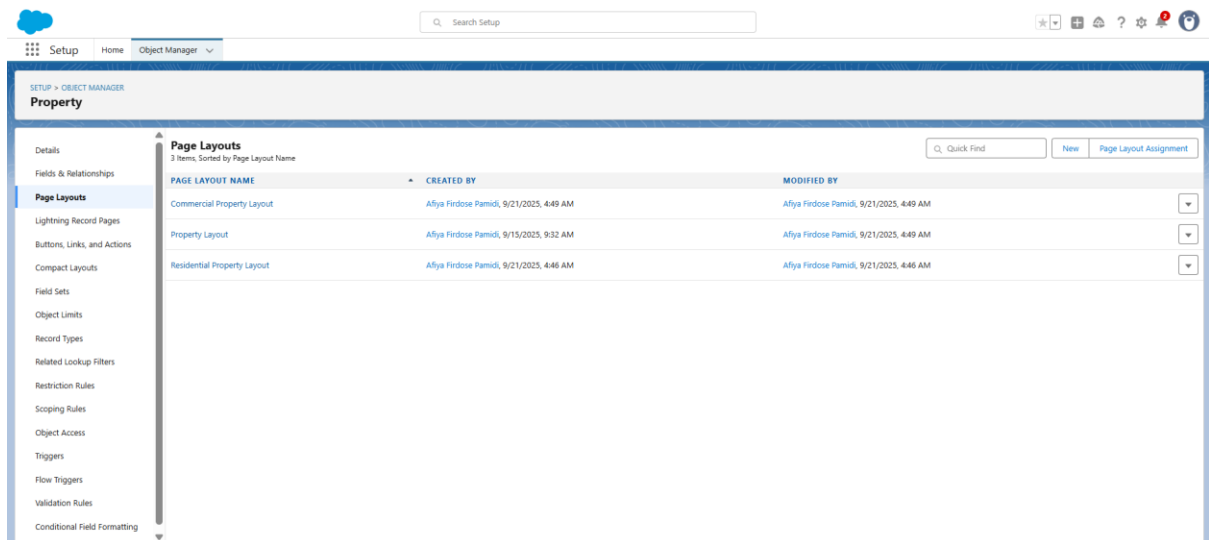
Record Types
3 Items, Sorted by Record Type Label

Quick Find: [] New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Commercial Property		✓	Afiya Firdose Pamiid, 9/21/2025, 7:04 AM
Residential Property		✓	Afiya Firdose Pamiid, 9/21/2025, 7:03 AM

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.

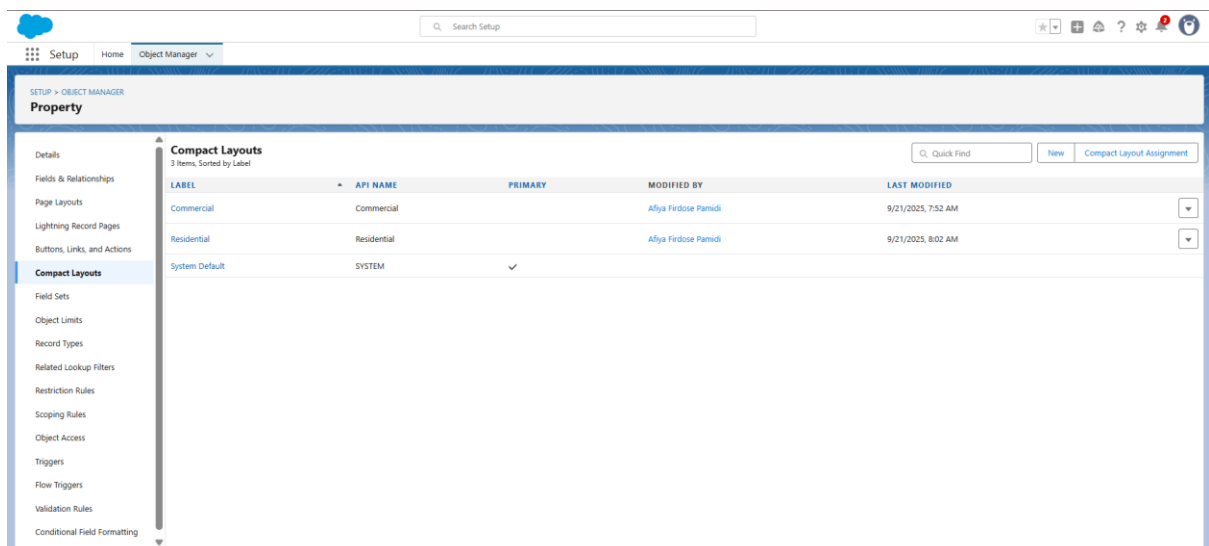


The screenshot shows the Salesforce Setup interface for the 'Property' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Page Layouts' and shows a table of three layouts: 'Commercial Property Layout', 'Property Layout', and 'Residential Property Layout'. Each layout is created and modified by 'Afya Firdose Pamidi' on 9/21/2025. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. There are also 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the table.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Commercial Property Layout	Afya Firdose Pamidi, 9/21/2025, 4:49 AM	Afya Firdose Pamidi, 9/21/2025, 4:49 AM
Property Layout	Afya Firdose Pamidi, 9/15/2025, 9:32 AM	Afya Firdose Pamidi, 9/21/2025, 4:49 AM
Residential Property Layout	Afya Firdose Pamidi, 9/21/2025, 4:46 AM	Afya Firdose Pamidi, 9/21/2025, 4:46 AM

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.

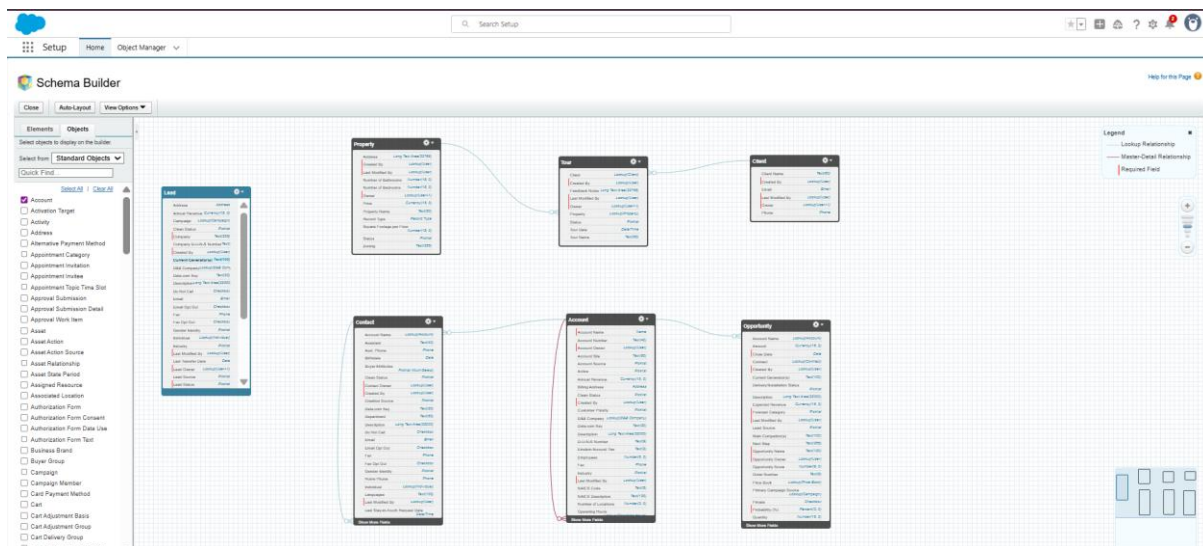


The screenshot shows the Salesforce Setup interface for the 'Property' object, specifically the 'Compact Layouts' section. The left sidebar is the same as the previous screenshot. The main content area is titled 'Compact Layouts' and shows a table of three layouts: 'Commercial', 'Residential', and 'System Default'. Each layout is created and modified by 'Afya Firdose Pamidi' on 9/21/2025. The table has columns for 'LABEL', 'API NAME', 'PRIMARY', 'MODIFIED BY', and 'LAST MODIFIED'. There are also 'Quick Find', 'New', and 'Compact Layout Assignment' buttons at the top right of the table.

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Commercial	Commercial		Afya Firdose Pamidi	9/21/2025, 7:52 AM
Residential	Residential		Afya Firdose Pamidi	9/21/2025, 8:02 AM
System Default	SYSTEM	✓		

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