

Phase 3: Data Modeling & Relationships – Smart Property Portal

Goal: Design a scalable and intuitive data structure to manage properties, client inquiries, and transactions within Salesforce.

1. Standard & Custom Objects

Standard Objects

Contact: Stores client details

User: Represents agents and managers

Custom Objects

Property: Stores real estate listings

Client Inquiry: Captures buyer/renter interest

Transaction: Records finalized deals

2. Key Fields

Property

Title (Text)

Location (Text)

Price (Currency)

Status (Picklist: Available, Sold, Rented)

Type (Picklist: Residential, Commercial)

Client Inquiry

Inquiry Date (Date)

Interested Property (Lookup → Property)

Client Name (Lookup → Contact)

Status (Picklist: Open, Closed)

Transaction

Deal Date (Date)

Final Price (Currency)

Linked Property (Lookup → Property)

Linked Client (Lookup → Contact)

[3. Record Types](#)

Property

Residential

Commercial

Transaction

Sale

Rental

[4. Page Layouts](#)

Property Layout

Displays inquiry history and transaction status

Client Inquiry Layout

Shows related property and client details

Transaction Layout

Includes deal summary and linked records

[5. Compact Layout](#)

Property

Title, Price, Status

Client Inquiry

Client Name, Status

Transaction

Deal Date, Final Price

6. Relationships

Lookup Relationships

Property ↔ Client Inquiry

Property ↔ Transaction

Contact ↔ Client Inquiry

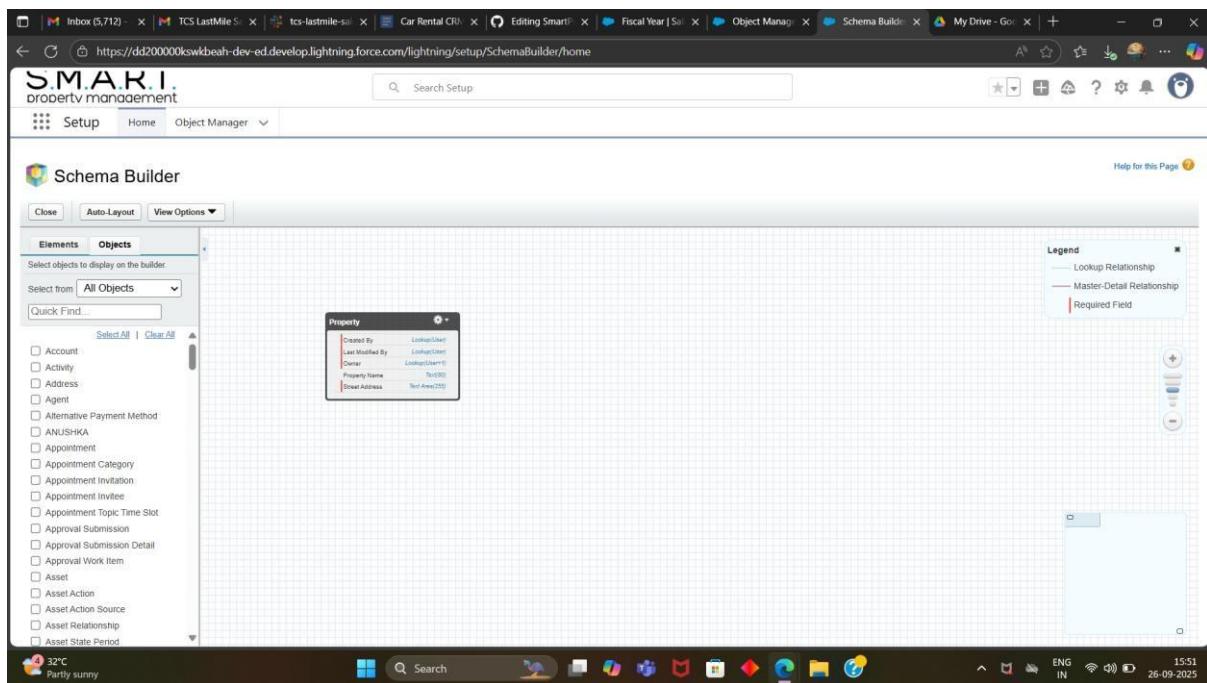
Contact ↔ Transaction

These relationships ensure seamless navigation and data integrity across modules.

7. Schema Builder

Used Schema Builder to visually map object relationships and dependencies.

Screenshot:



https://drive.google.com/file/d/1IF8YoLNX3WWZ-gq0AP4GIqr_2MDc7so4/view?usp=drive_link

8. Junction Objects (Future Scope)

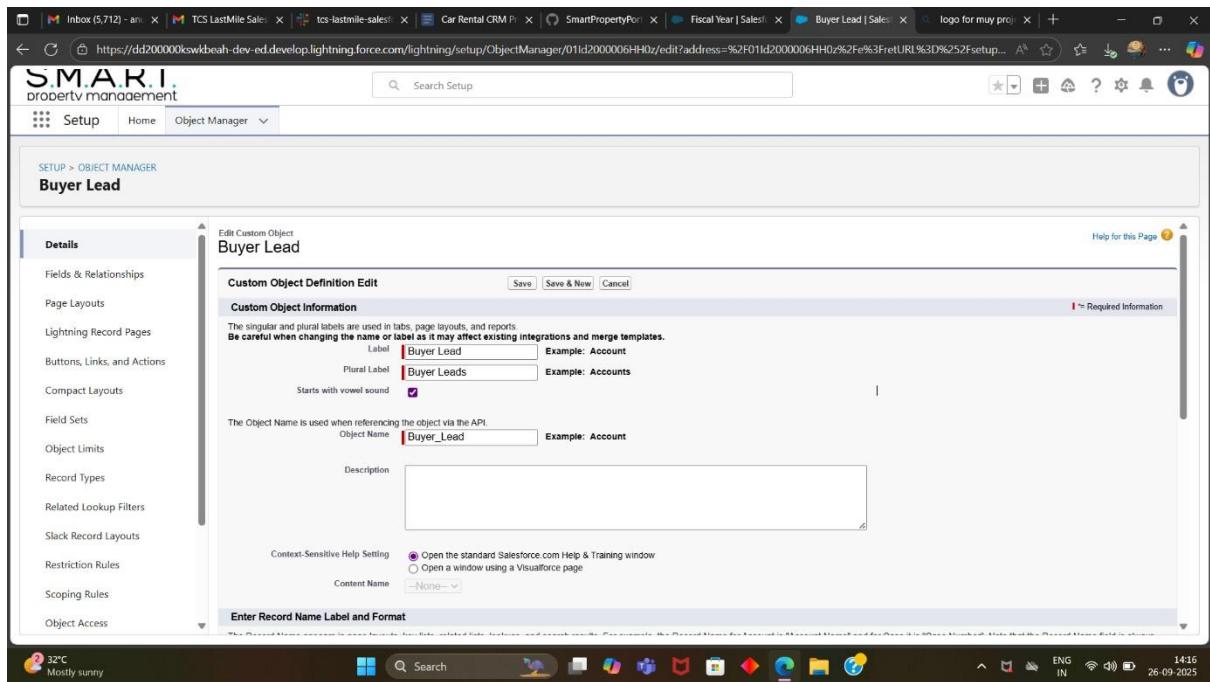
If future enhancements require linking multiple clients to one property (e.g., co-buyers), a junction object can be introduced to support many-to-many relationships.

9. External Objects

Can be used to integrate external property valuation or legal verification databases via Salesforce Connect or REST APIs.

Implementation Screenshots

Buyer Lead Object :



https://drive.google.com/file/d/1Gk887t8KQTThGBIZ1yZrwLGwUPaG74_K/view?usp=drive_link

Agent Object :

The screenshot shows the Salesforce Setup interface with the URL <https://dd200000swkbeah-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id200006HGs1/Details/view>. The page title is "Agent". The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main "Details" section shows the API Name as "Agent__c", Singular Label as "Agent", and Plural Label as "Agents". It also includes sections for Enable Reports, Track Activities, Deployment Status (Deployed), and Help Settings.

https://drive.google.com/file/d/1CwDMdEBiTosSxgoqlAjbqsKRJYcpeoRs/view?usp=drive_link

Appointment Object :

The screenshot shows the Salesforce Setup interface with the URL <https://dd200000swkbeah-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id200006Hfs2/Details/view>. The page title is "Appointment". The left sidebar lists various setup categories. The main "Details" section shows the API Name as "Appointment__c", Singular Label as "Appointment", and Plural Label as "Appointments". It also includes sections for Enable Reports, Track Activities, Deployment Status (Deployed), and Help Settings.

https://drive.google.com/file/d/1zIL14UFwW6Q6mqX_FqpSwexCJi1WjeF7/view?usp=sharing

Agent Fields :

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Fields & Relationships' and lists various layout types. The main area is titled 'Agent New Custom Field' and is on 'Step 4. Add to page layouts'. The field details are: Field Label: Price, Data Type: Currency, Field Name: Price. Under 'Select the page layouts that should include this field.', two checkboxes are selected: 'Add Field' and 'Agent Layout'. A note says: 'When finished, click Save & New to create more custom fields, or click Save if you are done.' The top right has 'Step 4 of 4' and buttons for Previous, Save & New, Save, and Cancel.

https://drive.google.com/file/d/1dD2kicdJHAZZH-6hBPRpqin4ihhYhOHj/view?usp=drive_link

Agent Assigned Lookup :

The screenshot shows the 'Custom Field Definition Detail' page for the 'Agent Assigned' field. The 'Field Information' section includes: Field Label: Agent Assigned, Field Name: Agent, API Name: Agent__c, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Data, Compliance Categorization: Standard, Created By: Anushka Jain, 26/09/2025, 2:38 pm, Modified By: Anushka Jain, 26/09/2025, 2:38 pm. The 'Lookup Options' section includes: Related To: Agent, Related List Label: Agents, Required: Unchecked, and a note: 'What do if the lookup record is deleted?'. The 'Custom Field Definition Detail' page has tabs for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?

https://drive.google.com/file/d/1yJH_iZ7X-HGKk596mG_kyl9y6yJXZvk0/view?usp=drive_link

Buyer Lead Fields :

The screenshot shows the Salesforce Object Manager interface for the 'Buyer Lead' object. On the left, there's a sidebar with various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and lists seven items, sorted by Field Label. A table provides details for each field:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Email	Email_c	Email		
Interest Level	Interest_Level__c	Picklist		
Last Modified By	LastModifiedBy	Lookup(User)		
Lead Name	Name	Text(80)		
Owner	OwnerId	Lookup(User,Group)		
Preferred Location	Preferred_Location__c	Text(255)		

https://drive.google.com/file/d/18cMj0wkHjCUy7dL2b8BuoMdVTYoi8UNq/view?usp=drive_link

Summary

This phase establishes the core data model for SmartPropertyPortal, ensuring scalability, clarity, and seamless integration across modules. All objects, fields, and relationships were implemented in Salesforce Developer Org and verified through screenshots.