

## Phase 3: Data Modelling & Relationships

This phase focuses on designing the **data model** that represents the real estate firm's business processes inside Salesforce.

### Standard & Custom Objects

- **Standard Objects (Salesforce-provided):**
  - **Lead:** Captures property inquiries from website, social media, or offline channels.
  - **Opportunity (Deal):** Used to manage negotiations, offers, and deal closure.
  - **Contact:** Represents prospective buyers with personal details.
  - **Account:** Used for corporate buyers, property investors, or real estate partners.
- **Custom Objects (specific to project needs):**
  - **Property:** Stores property details (location, price, features, status).
  - **Property Visit:** Tracks scheduled visits, visit status, and customer feedback.
  - **Booking/Agreement:** Captures booking details, payment status, and uploaded documents.

### Fields (Key Fields per Object)

- **Leads:** Name, Contact Info, Lead Source, Interest Score, Territory, Status
- **Properties:** Property Name, Location, Price, Type (Apartment/Villa), Status (Available/Sold)
- **Property Visits:** Visit Date, Visit Time, Agent Assigned, Customer Feedback
- **Deals (Opportunities):** Offer Price, Negotiation Status, Closing Date, Deal Stage
- **Booking/Agreements:** Booking Amount, Agreement Date, Document Upload.

### Record Types

- **Leads:** Buyer vs. Investor inquiries (different follow-up flows).
- **Properties:** Residential vs. Commercial properties (different fields/layouts).
- **Deals:** New Deal vs. Resale Deal (different sales processes).

## Page Layouts

- **Lead Page:** Show Lead Source, Assigned Agent, Interest Score.
- **Property Page:** Display Location, Price, Features, Availability, and Linked Visits.
- **Deal Page:** Show related Property, Lead, Offer Amount, Negotiation Notes.
- **Booking Page:** Highlight Payment Details and Uploaded Agreements.

## Compact Layouts (for Mobile Users)

- **Leads (Agents):** Show Name, Phone, Email, Lead Score on mobile.
- **Properties (Agents):** Show Property Name, Price, Location, Status at a glance.
- **Visits (Agents):** Quick view of Visit Date, Time, Assigned Agent.

## Schema Builder (Visual Data Model)

- Build ERD showing relationships:
  - **Lead → Contact → Deal**
  - **Property → Property Visit → Deal**
  - **Booking → Deal**

## Lookup vs Master-Detail vs Hierarchical Relationships

- **Property Visit → Property (Master-Detail):** Each visit is tied to a property; deleting the property deletes all visits.
- **Deal → Property (Lookup):** A deal is linked to a property, but properties can exist independently.
- **Deal → Lead/Contact (Lookup):** Deals tied to leads/contacts but not dependent.
- **Booking → Deal (Master-Detail):** Each booking belongs to one deal.

## Junction Objects (Many-to-Many)

- **Agent-Property Assignment:** A junction object between **Agents** and **Properties** (an agent can manage multiple properties; a property can have multiple agents).

## External Objects

- Integrate **External Property Listings** as External Objects → keeps Salesforce updated with real-time inventory feeds.