Project Title: Real Estate Property Management System

Phase 3 – Data Modeling & Relationships

Objective

In this phase, I focused on designing the data model for the Rental Property Management system in Salesforce. The goal was to define objects, fields, record types, and layouts to represent tenants, properties, and leases accurately.

Steps I Followed

A. Standard & Custom Objects

I used a combination of standard objects and custom objects:

Standard Object: User (for Admin, Manager, Agent roles)

Custom Objects:

- Tenant: to store tenant details
- Property: to manage property details
- Lease: to track agreements between tenants and properties

B. Fields

I created the necessary fields in each object:

Tenant Object Fields:

- Tenant ID (Auto Number)
- First Name (Text)
- Last Name (Text)
- Email (Email)
- Phone (Phone)
- Property (Lookup → Property)
- Lease (Lookup → Lease)

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Property Object Fields:

- Property ID (Auto Number)
- City (Text)
- Location (Text Area)
- Rental Amount (Currency)
- Number of Bedrooms (Number)
- Status (Picklist: Available, Occupied, Under Maintenance)

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Lease Object Fields:

- Lease ID (Auto Number)
- Start Date (Date)
- End Date (Date)
- Monthly Rent (Currency)
- Tenant (Lookup → Tenant)
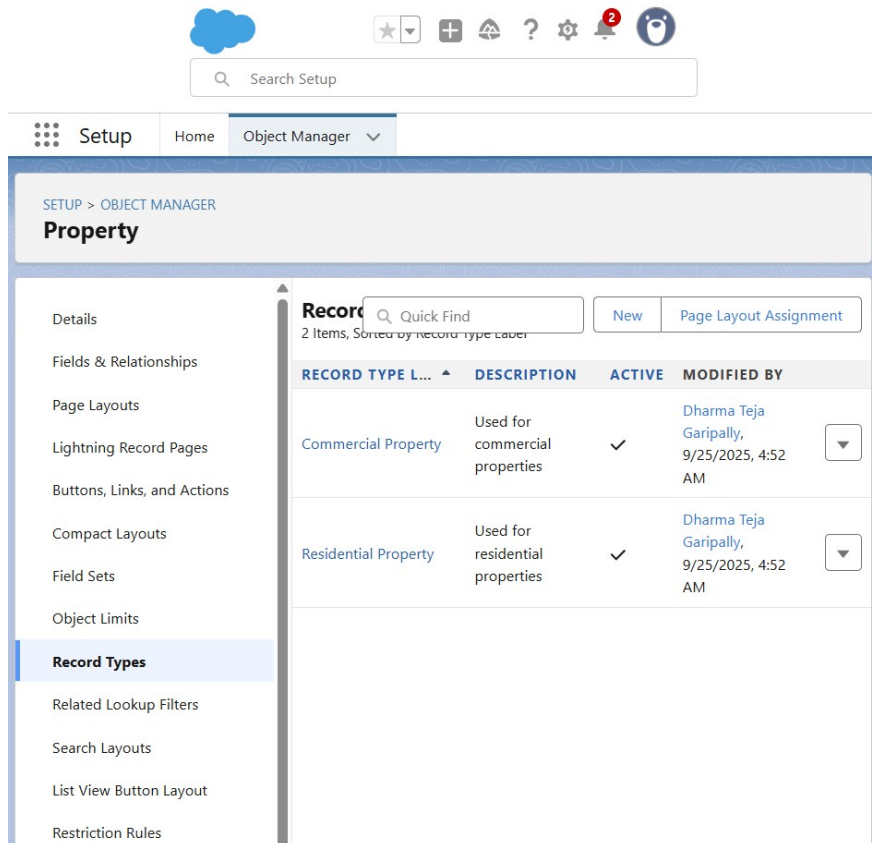- Property (Lookup → Property)
- Status (Picklist)

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C. Record Types

For Property, I created two record types:

- Residential Property
- Commercial Property

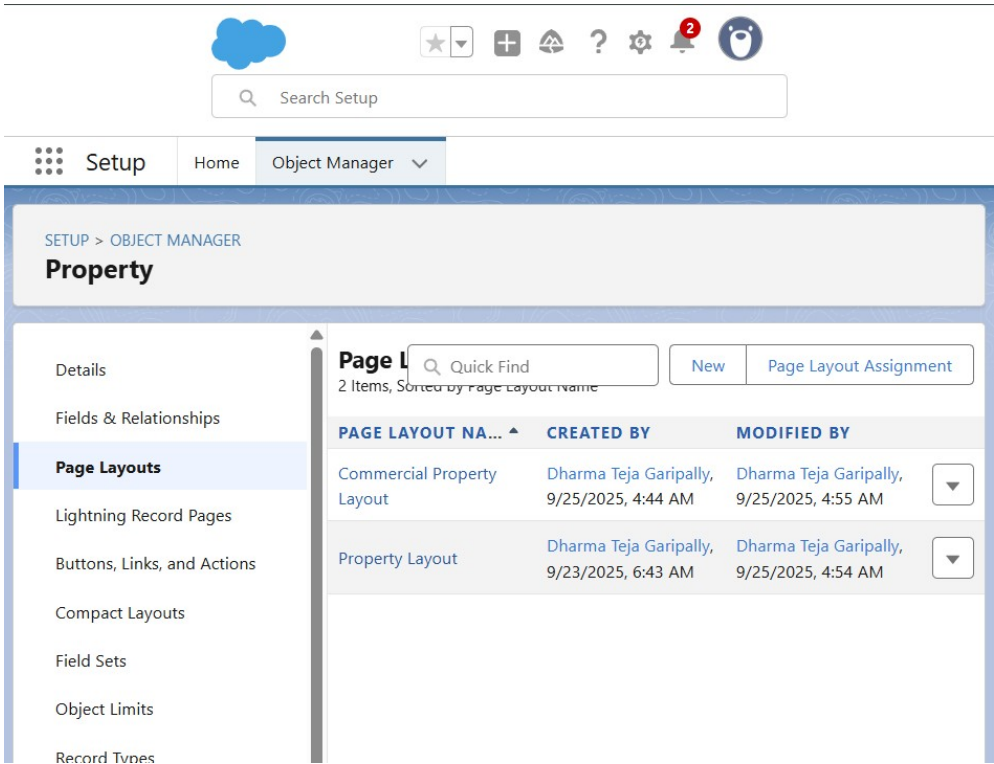Commercial Property has a separate page layout.

D. Page Layouts

Property Layout (Residential): Used for residential properties

Commercial Property Layout: Custom layout for commercial properties with sections for all relevant fields

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E. Relationships & Schema
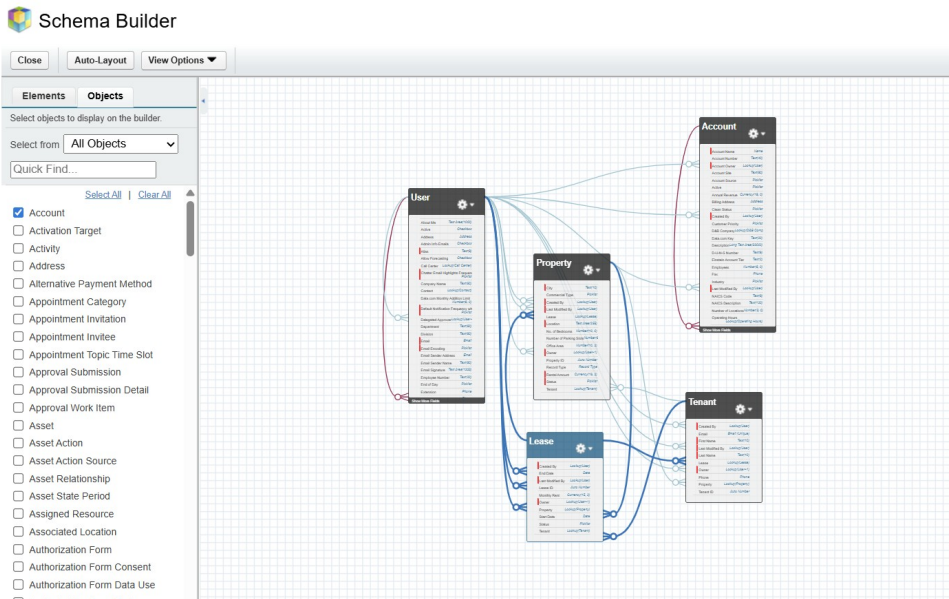
Relationships are Lookup fields only:

Lease → Property

Lease → Tenant

Tenant → Property

Schema Builder can be used to visualize these relationships.

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F. Testing

Created sample property records and assigned record types (Residential/Commercial).

Verified that Commercial Property Layout displays correctly for commercial properties.

Verified that fields and related lists show up as expected for all profiles.

Deliverables

Screenshots of:

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- Custom Objects list
- Fields for each object
- Record Types
- Page Layouts (Residential & Commercial)
- Schema Builder / relationships visualization
- Sample records

Conclusion

Phase 3 established the core data model with objects, fields, record types, and layouts. Commercial properties now have a dedicated layout, and the system is ready for the next phase of automation and business logic.