

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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SETUP > OBJECT MANAGER

Tenant

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

Quick Find

New

Deleted Fields

Fields

10 items, sorted by field label

FIELD LABEL	FIELD NAME	DATA TYPE	COL
Created By	CreatedById	Lookup(User)	
Email	Email__c	Email (Unique)	
First Name	First_Name__c	Text(10)	
Last Modified By	LastModifiedById	Lookup(User)	
Last Name	Last_Name__c	Text(10)	
Lease	Lease__c	Lookup(Lease)	
Owner	OwnerId	Lookup(User,Group)	
Phone	Phone__c	Phone	
Property	Property__c	Lookup(Property)	
Tenant ID	Name	Auto Number	

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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SETUP > OBJECT MANAGER

Property

Details

Fields & Relationships

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Search Layouts

List View Button Layout

Restriction Rules

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Flow Triggers

Fields & Relationships

11 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(10)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lease	Lease__c	Lookup(Lease)		✓
Location	Location__c	Text Area(255)		
No. of Bedrooms	No_of_Bedrooms__c	Number(10, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Property ID	Name	Auto Number		✓
Rental Amount	Rental_Amount__c	Currency(16, 2)		
Status	Status__c	Picklist		
Tenant	Tenant__c	Lookup(Tenant)		✓

Lease Object Fields:

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

SETUP > OBJECT MANAGER

Lease

Details

Fields & Relationships

Page Layouts

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FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
End Date	End_Date__c	Date	
Last Modified By	LastModifiedById	Lookup(User)	
Lease ID	Name	Auto Number	
Monthly Rent	Monthly_Rent__c	Currency(15, 2)	
Owner	OwnerId	Lookup(User,Group)	
Property	Property__c	Lookup(Property)	
Start Date	Start_Date__c	Date	
Status	Status__c	Picklist	
Tenant	Tenant__c	Lookup(Tenant)	

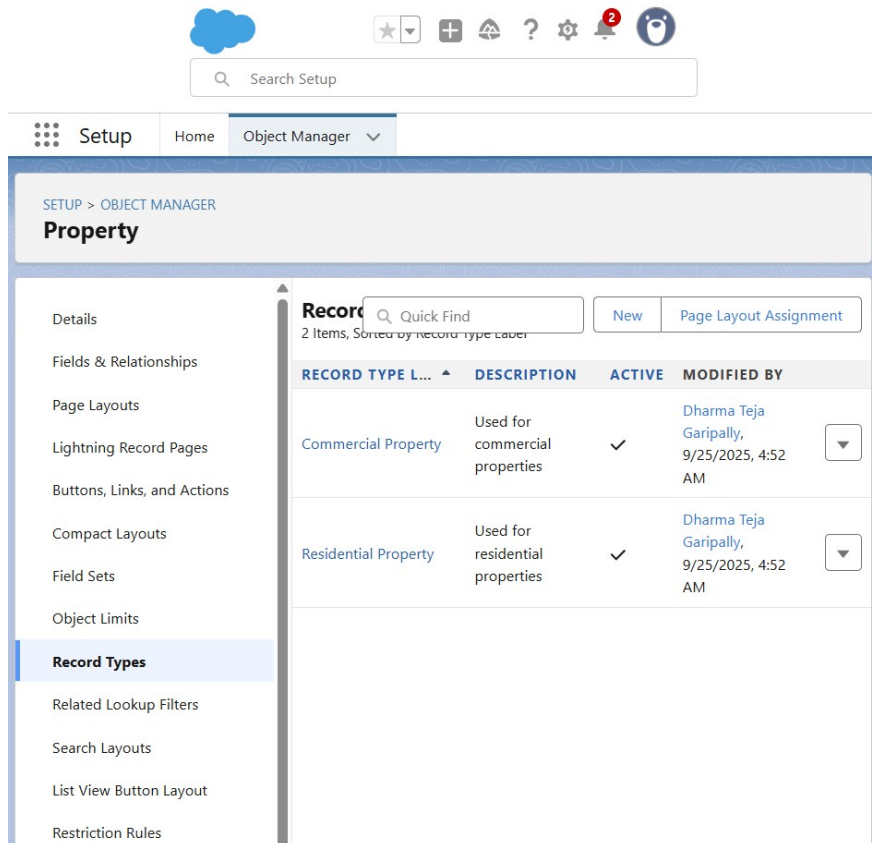
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C. Record Types

For Property, I created two record types:

- Residential Property
- Commercial Property

Commercial Property has a separate page layout.

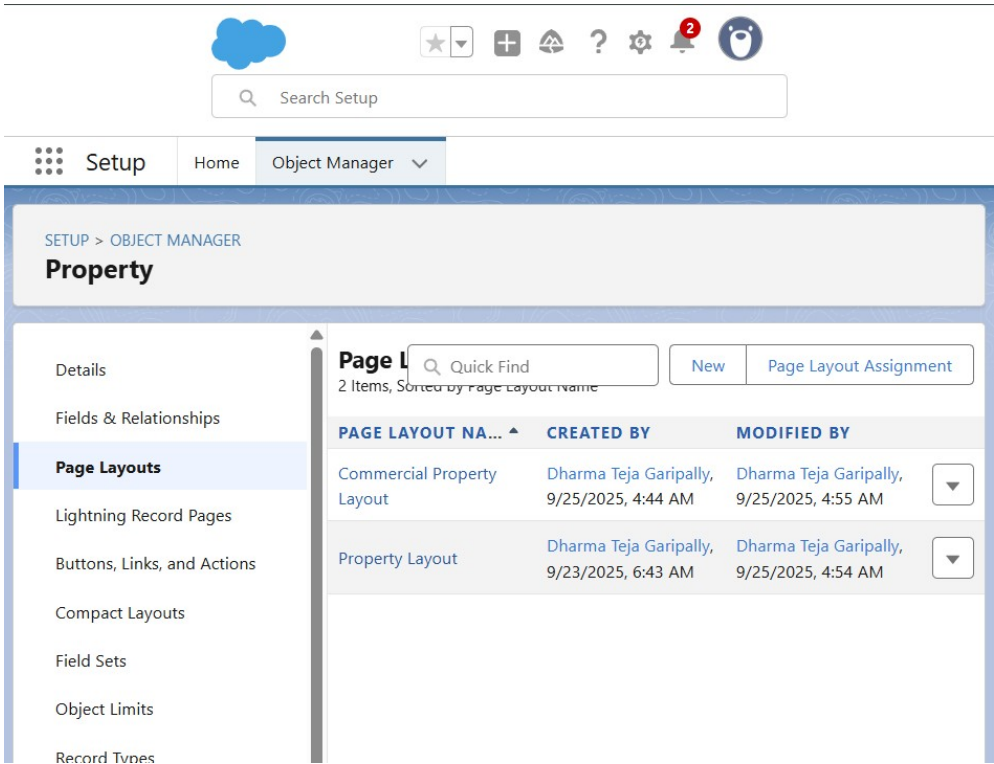


D. Page Layouts

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:

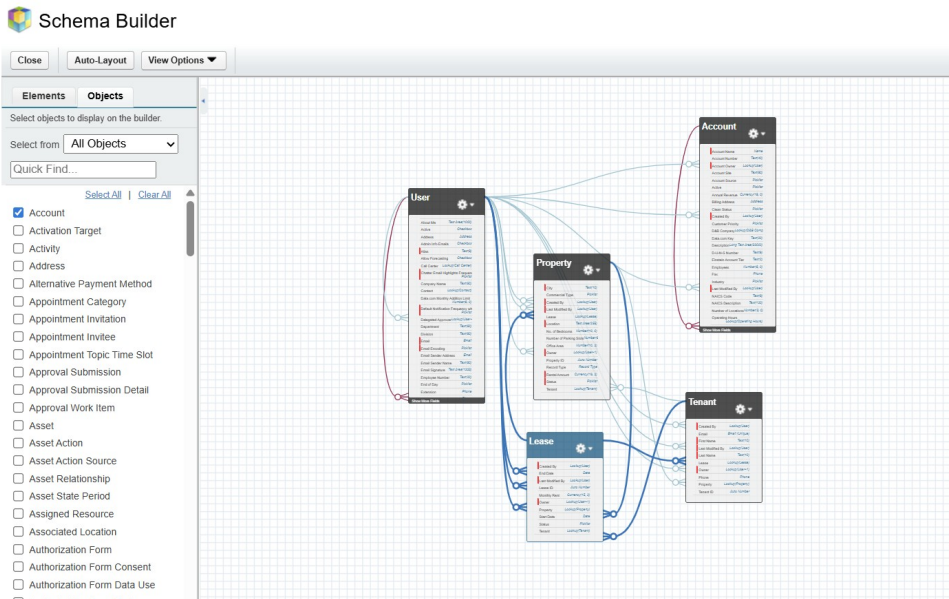
Lease → Property

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.

The screenshot shows the Real Estate Management system interface. The top navigation bar includes a search bar and a dropdown menu with options: Properties, Tenants, Leases, Reports, and More. The main content area displays a list of properties with columns: Property ID, Status, and Record Type. The list contains 6 items, sorted by Property ID. The first item is highlighted.

Property ID	Status	Record Type
1	Occupied	Residential Property
2	Occupied	Residential Property
3	Occupied	Residential Property
4	Under Maintenance	Residential Property
5	Occupied	Commercial Property
6	Available	Commercial Property

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.