EstateFlow – Real Estate Lead Conversion & Sales Management Portal

Industry: Real Estate
Project Type: B2C Salesforce CRM Implementation
Target Users: Sales Agents, Property Managers, Prospective Buyers

Phase 1: Problem Understanding & Industry Analysis

- Gather requirements from stakeholders (sales agents, managers, buyers).
- Analyze real estate industry CRM use cases.
- Map current business processes (manual inquiry tracking, offline visits, delayed follow-ups).
- Explore AppExchange apps (SMS, Maps, DocuSign for real estate).

Phase 2: Org Setup & Configuration

- Choose Salesforce edition (Sales Cloud Enterprise).
- Configure company profile (business hours, holidays, fiscal year).
- Create users with roles: Sales Agent, Property Manager, Admin.
- Setup OWD & sharing rules (agents see only assigned leads, managers see all).
- Use sandbox for testing and deployment planning.

Phase 3: Data Modeling & Relationships

- Custom Objects: Property__c (fields: Location, Price, Size, Status), Visit__c (fields: Date, Status, Customer, Property), Deal__c (fields: Offer, Negotiation, Closure Status).
- Relationships: Lead → Visit (Lookup), Property → Visit (Master-Detail), Property → Deal (Lookup).
- Use Schema Builder to visualize.

Phase 4: Process Automation (Admin)

- Validation Rules (property price cannot be negative, visit date ≥ today).
- Process Builder/Flows: Auto-assign leads to agents by territory, Send confirmation emails/SMS for scheduled visits, Auto-update property status when deal closes.
- Approval process for high-value deals (> ■50L).

Phase 5: Apex Programming (Developer)

- Triggers: After Insert on Lead → Create related Property Interest record, Before Insert on Visit → Validate conflicts.
- Classes for deal calculation (commission, tax).
- Batch Apex for nightly lead qualification scoring.
- Queueable Apex for sending bulk notifications.
- Test classes for all Apex code.

Phase 6: User Interface Development

- Build a custom Lightning App: EstateFlow CRM.
- Tabs: Leads, Properties, Visits, Deals.
- Lightning Pages: Property Page → Show details + related visits, Visit Page → Show schedule + agent/customer info.
- LWC: Visit Scheduling Component, Property Search (filter by location, budget).

Phase 7: Integration & External Access

- Web-to-Lead integration from company website.
- SMS Gateway integration via Named Credentials.
- DocuSign integration for agreements.
- Salesforce Connect (if external property DB exists).
- Platform Events for notifying managers when big deals close.

Phase 8: Data Management & Deployment

- Import existing leads/properties using Data Loader.
- Duplicate rules (avoid duplicate buyers).
- Data backup & export weekly.
- Use Change Sets for sandbox → production deployment.
- Manage via VS Code + SFDX for developers.

Phase 9: Reporting, Dashboards & Security

- Reports: Monthly Sales Performance (Summary), Lead Funnel (Matrix), Agent Activity (Joined).
- Dashboard: Real-time sales performance, lead pipeline.
- Security Review: Field-level security (hide sensitive buyer info from all agents), Login IP restrictions, Audit Trail enabled.

Phase 10: Final Presentation & Demo

- Pitch: Show how EstateFlow automates lead → visit → deal → closure.
- Demo Walkthrough with real-time dashboards.
- Collect stakeholder feedback.
- Deliver handoff documentation.
- Showcase project on LinkedIn/portfolio.