Real Estate CRM Project

# Phase 1: Problem Understanding & Industry Analysis

Goal: Understand the business problem and define CRM needs.

1. Requirement Gathering  
 - Meet with stakeholders (Real estate agents, Property managers, Sales managers, Customers).  
 - Example requirements:  
 • Track all properties with availability status (For Sale / Sold / Under Negotiation).  
 • Manage client inquiries and property visits.  
 • Automate follow-ups with leads.  
 • Generate sales pipeline and revenue reports.

2. Stakeholder Analysis  
 - Admin – Configures Salesforce and manages system setup.  
 - Real Estate Agents – Manage properties, handle client leads, schedule visits.  
 - Sales Manager – Monitors team performance, approves high-value deals.  
 - Customer Service – Handles post-sale services or support.  
 - Clients/Buyers – Interact through web/portal forms, inquiries, or marketing campaigns.

3. Business Process Mapping  
 - Lead generated (via portal/marketing) → Agent contacts client → Schedule property visit → Convert lead to Opportunity → Deal closed (property sold) → Post-sale support.

4. Industry-specific Use Case Analysis  
 - Real estate involves high-value transactions, longer sales cycles, and multiple stakeholders.  
 - CRM must track: Leads → Opportunities → Properties → Deals.  
 - Need to integrate with marketing campaigns, track property inventory, and ensure compliance.

5. AppExchange Exploration  
 - Search “Real Estate CRM.” Some apps exist, but we’ll build a tailored CRM for learning purposes.

# Phase 2: Org Setup & Configuration

Goal: Prepare Salesforce environment.

1. Salesforce Edition – Use Developer Org.

2. Company Profile Setup – Real estate company info, time zone, currency (USD/INR).

3. Business Hours & Holidays – 9 AM – 7 PM, weekends off.

4. Fiscal Year Settings – Jan–Dec for reporting.

5. User Setup & Licenses – Agents, Managers.

6. Profiles – Agent (limited), Manager (full).

7. Roles – Manager above Agents.

8. Permission Sets – For extra access like Reports/Dashboards.

9. OWD (Org-Wide Defaults) – Property (Public Read Only), Leads & Deals (Private).

10. Sharing Rules – Allow visibility among team members if needed.

11. Login Access Policies – Restrict agent logins to office hours.

12. Sandbox Setup – For testing before deployment.

13. Deployment Basics – Use Change Sets for moving config/code.

# Phase 3: Data Modeling & Relationships

Goal: Build data structure.

1. Objects  
 - Standard: Lead, Contact, Opportunity.  
 - Custom: Property, Visit/Appointment.

2. Fields  
 - Property: Location, Type (Apartment/Villa/Commercial), Price, Status.  
 - Appointment: Date, Time, Property, Assigned Agent.

3. Record Types – Residential vs Commercial Properties.

4. Page Layouts – Property shows client inquiries, Opportunities show related property.

5. Compact Layouts – Mobile view: Property Name, Price, Status.

6. Schema Builder – To map Property ↔ Lead/Opportunity relationships.

7. Relationships  
 - Property ↔ Opportunity → Lookup.  
 - Lead ↔ Appointment → Lookup.

# Phase 4: Process Automation (Admin)

Goal: Automate tasks.

1. Validation Rules – Property Price > 0.

2. Approval Process – Deals above ₹1 Cr need Manager approval.

3. Flow Builder – Auto-calculate deal value, Send follow-up reminder emails.

4. Email Alerts – Notify clients after booking property visits.

5. Tasks – Auto-create task for agent after client inquiry.

6. Custom Notifications – Notify Sales Manager when high-value deal created.

# Phase 5: Apex Programming (Developer)

Goal: Advanced logic.

1. Apex Triggers – Prevent duplicate property records.

2. SOQL Queries – Fetch available properties within a price range.

3. Batch Apex – Nightly job to send pending follow-up reminders.

4. Scheduled Apex – Morning email to Manager: “Today’s property visits.”

5. Queueable Apex – Handle bulk SMS/email campaigns.

6. Exception Handling – If property unavailable, throw error.

7. Test Classes – Ensure triggers and classes work properly.

# Phase 6: User Interface Development

Goal: Create user-friendly UI.

1. Lightning App – “Real Estate CRM.”

2. Tabs – Properties, Leads, Deals, Appointments.

3. Home Page – Dashboard: Leads pipeline, Top Properties, Sales Target.

4. Utility Bar – Quick “Schedule Visit” button.

5. LWC Components – Property Search by location/price, Datatable to display available properties.

6. Events in LWC – Child (filter form) → Parent (property list).

7. Navigation Service – After creating Opportunity → redirect to deal record.

# Phase 7: Integration & External Access

Goal: Connect with external tools.

1. Named Credentials – Store Google Maps API key.

2. External Services – Integrate with Payment Gateway (for booking deposits).

3. REST Callouts – Fetch market valuation data.

4. Platform Events – Notify system when property is sold.

5. Change Data Capture – Sync updates with external property listing websites.

6. Salesforce Connect – Connect with external DB of government property registry.

7. API Limits – Monitor API usage.

# Phase 8: Data Management & Deployment

Goal: Manage data efficiently.

1. Data Import Wizard – Import demo property data.

2. Data Loader – Upload bulk leads.

3. Duplicate Rules – Prevent duplicate client entries.

4. Backup – Weekly export of property + deal data.

5. Change Sets – Move config to Production.

6. Packages – Unmanaged for internal use.

7. VS Code & SFDX – For developer-friendly deployments.

# Phase 9: Reporting, Dashboards & Security Review

Goal: Insights & security.

1. Reports – Property Sales by Month, Agent-wise Deal Closure Rate, Revenue by Property Type.

2. Dashboards – Sales Manager Dashboard, Pipeline Dashboard.

3. Dynamic Dashboards – Agent sees only their deals.

4. Sharing Settings – Leads/Deals private. Properties public.

5. Field Level Security – Hide “Client Financial Details” from Agents.

6. Session Settings – Timeout after 30 min.

7. Audit Trail – Track changes on deal approvals.

# Phase 10: Final Presentation & Demo Day

Goal: Deliver final project.

1. Pitch Presentation – Problem → Solution → Benefits for real estate.

2. Demo Walkthrough – Lead to Deal conversion, Property search, Approval process.

3. Handoff Documentation – Share system design, user manual.

4. LinkedIn/Portfolio Showcase – Highlight as Salesforce Real Estate CRM project.