

Salesforce PropertyHub

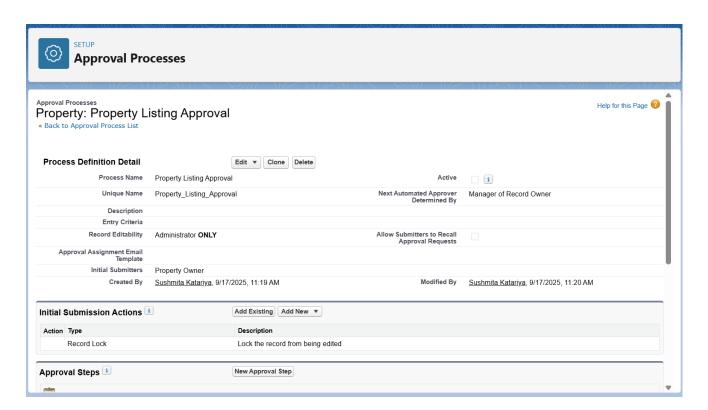
By:- Sushmita Katariya

Phase 4 - Automation & Workflows

Approval Process Configuration

An automated approval process was implemented to manage new property listings, ensuring data quality and compliance before they are marked as available.

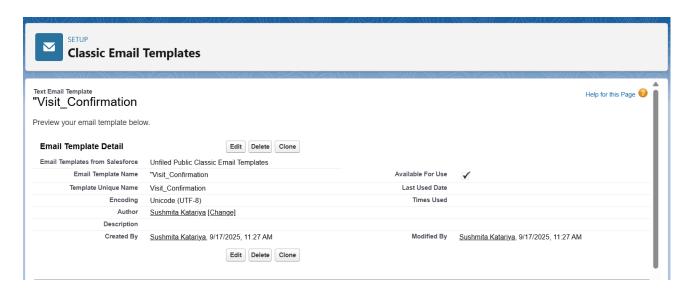
- Approval Status Field: A new picklist field (Approval_Status__c) was added to the Property object with values: Draft, Submitted, Approved, Rejected.
- Automated Submission: Logic was built to automatically submit properties for approval when specific criteria are met (e.g., price is greater than \$0).
- Approval Actions: Upon approval, properties are automatically set to Available status. Upon rejection, the approval status is updated accordingly.



Email Notification System

A comprehensive notification service was developed to keep agents and customers informed throughout the process.

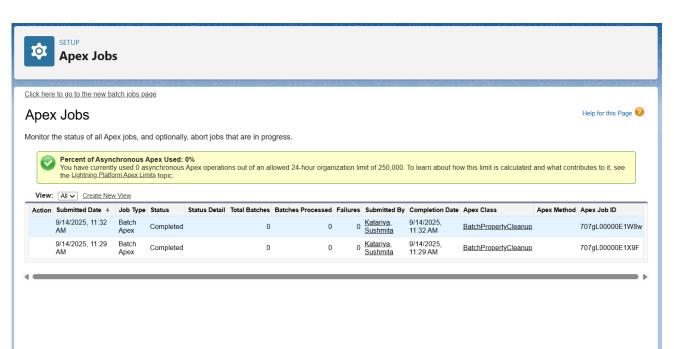
- **Visit Confirmations:** Automated emails are sent to prospective buyers when a property visit is scheduled, confirming the date, time, and property details.
- **Approval Alerts:** Automated notifications are sent to property owners when their listing is approved or rejected.
- Approval Requests: Email alerts are sent to managers when a new property requires their review and approval.



Scheduled Data Maintenance

A batch automation process was implemented to regularly clean up old data and maintain system performance.

- **Batch Apex Class:** A scheduled job (BatchPropertyCleanup) runs to identify properties that have been **Off Market** for more than 6 months.
- Automated Cleanup: The job automatically archives or deletes these outdated records.
- **Completion Notification:** An email is sent to the system administrator upon completion of the batch job.



Lead Assignment Flow

A declarative automation flow was created to streamline the assignment of new leads.

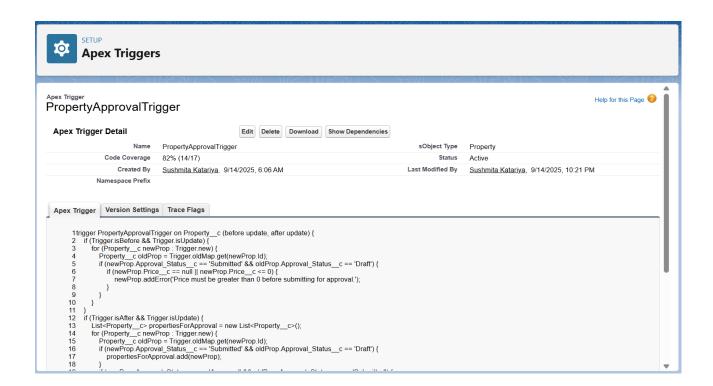
- Flow Definition: An auto-launched flow (Lead_Assignment_Flow) was created to trigger upon lead creation.
- **Territory Logic:** The flow incorporates the territory assignment logic developed in Phase 2 to ensure leads are routed to the correct sales agent based on geographic location.



Data Validation & Triggers

Robust validation rules and triggers were implemented to enforce data integrity and automate processes.

- Approval Validation: A trigger (PropertyApprovalTrigger) prevents properties from being submitted for approval if required fields (like Price) are missing or invalid.
- Process Automation: The trigger automatically calls the appropriate handler classes to submit records for approval and process the approval results.



Next Steps: Phase 5

With the core automation and business logic complete, the next phase will focus on the user interface and experience:

- **Lightning Web Components (LWC):** Develop custom components for a modern user experience.
- **Experience Cloud:** Configure a customer portal for prospective buyers to browse properties and schedule visits.
- Mobile Optimization: Ensure the application is fully functional on mobile devices.
- Dashboard & Analytics: Build executive dashboards for real-time business insights.