



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.

 **Approval Processes**

Approval Processes

Property: Property Listing Approval

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Process Definition Detail

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Process Name	Property Listing Approval	Active	<input type="checkbox"/> i
Unique Name	Property_Listing_Approval	Next Automated Approver Determined By	Manager of Record Owner
Description			
Entry Criteria			
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Property Owner		
Created By	Sushmita Katariya, 9/17/2025, 11:19 AM	Modified By	Sushmita Katariya, 9/17/2025, 11:20 AM

Initial Submission Actions [i](#)

[Add Existing](#) [Add New](#)

Action	Type	Description
Record Lock		Lock the record from being edited


Approval Steps [i](#)

[New Approval Step](#)

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.

 **Classic Email Templates**

Text Email Template

"Visit_Confirmation"

Preview your email template below.

Email Template Detail Edit Delete Clone


Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	✓
Email Template Name	"Visit_Confirmation"	Last Used Date	
Template Unique Name	Visit_Confirmation	Times Used	
Encoding	Unicode (UTF-8)		
Author	Sushmita Katariya [Change]		
Description			
Created By	Sushmita Katariya, 9/17/2025, 11:27 AM	Modified By	Sushmita Katariya, 9/17/2025, 11:27 AM

Edit Delete Clone

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.

 **Apex Jobs**

[Click here to go to the new batch jobs page](#)

Apex Jobs

Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

 **Percent of Asynchronous Apex Used: 0%**
You have currently used 0 asynchronous Apex operations out of an allowed 24-hour organization limit of 250,000. To learn about how this limit is calculated and what contributes to it, see the [Lightning Platform Apex Limits](#) topic.


View: All Create New View

Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class	Apex Method	Apex Job ID
	9/14/2025, 11:32 AM	Batch Apex	Completed		0	0	0	Katariya, Sushmita	9/14/2025, 11:32 AM	BatchPropertyCleanup		707gL00000E1W8w
	9/14/2025, 11:29 AM	Batch Apex	Completed		0	0	0	Katariya, Sushmita	9/14/2025, 11:29 AM	BatchPropertyCleanup		707gL00000E1X9F

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.

 **SETUP**
Flows

Flow

Lead_Assignment_Flow

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Flow Detail

EditOpenRunDelete

Flow Label	Lead_Assignment_Flow	Flow API Name	Lead_Assignment_Flow
Description		Namespace Prefix	
Environments	Default	Type	Autolaunched Flow
Active Version	1	URL	/flow/Lead_Assignment_Flow
Trigger	Record—Run After Save	Activated/Deactivated By	Sushmita Katariya, 9/17/2025, 11:45 AM
Modified By	Sushmita Katariya, 9/17/2025, 11:45 AM	Created By	Sushmita Katariya, 9/17/2025, 11:40 AM


Flow Versions

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Progress Status	Run in Mode	API Version for Running the Flow	Log Metrics to Da
Open Run Deactivate	Lead_Assignment_Flow	1		Flow Builder	9/17/2025, 11:45 AM	Autolaunched Flow	Active	Activated	Default Mode	64.0	<input type="checkbox"/>

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.



SETUP

Apex Triggers

Apex Trigger

PropertyApprovalTrigger

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Apex Trigger Detail

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Show Dependencies

Name	PropertyApprovalTrigger	sObject Type	Property
Code Coverage	82% (14/17)	Status	Active
Created By	Sushmita Katariya, 9/14/2025, 6:06 AM	Last Modified By	Sushmita Katariya, 9/14/2025, 10:21 PM
Namespace Prefix			

Apex Trigger

Version Settings

Trace Flags

```

1 trigger PropertyApprovalTrigger on Property__c (before update, after update) {
2   if (Trigger.isBefore && Trigger.isUpdate) {
3     for (Property__c newProp : Trigger.new) {
4       Property__c oldProp = Trigger.oldMap.get(newProp.Id);
5       if (newProp.Approval_Status__c == 'Submitted' && oldProp.Approval_Status__c == 'Draft') {
6         if (newProp.Price__c == null || newProp.Price__c <= 0) {
7           newProp.addError('Price must be greater than 0 before submitting for approval.');
```

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.