



Salesforce PropertyHub

By:- Sushmita Katariya

Phase 3 - Data Modeling & Core Objects

Core Custom Objects Created

The foundational data structure for the PropertyHub application was implemented by creating the following custom objects:

- **Property__c**: To manage all real estate listings and their details.
- **Property_Visit__c**: To schedule and track customer visits to properties.

Object Manager						
2 Items, Sorted by Label						
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Property	Property__c	Custom Object		9/16/2025	✓	▼
Property Visit	Property_Visit__c	Custom Object		9/13/2025	✓	▼

Property Object Field Setup

Configured the following custom fields under *Property__c* to capture all necessary listing details:

- **Address__c** (Text): Street address of the property. *Required.*
- **City__c** (Text): City where the property is located.
- **Price__c** (Currency): Listing price of the property. *Required.*
- **Bedrooms__c** (Number): Number of bedrooms.
- **Bathrooms__c** (Number): Number of bathrooms.
- **Property_Type__c** (Picklist): Type of property (Single Family, Condo, Townhouse, Multi Family, Commercial).

- **Status__c** (Picklist): Current status of the listing (Available, Pending, Sold, Off Market). *Default: Available.*

SETUP > OBJECT MANAGER

Property

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Fields & Relationships
23 Items, Sorted by Field Label

[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(255)		
Agent	Agent__c	Lookup(User)		✓
Approval Status	Approval_Status__c	Picklist		
Bathrooms	Bathrooms__c	Number(2, 0)		
City	City__c	Text(80)		
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Description	Description__c	Text Area(255)		
Last Approval Date	Last Approval Date__c	Date		

Property Visit Object & Relationship Setup

Configured the following custom fields under *Property_Visit__c* to manage site visits:

- **Property__c** (Master-Detail): Relationship to the Property object. *Required.*
- **Visit_Date__c** (Date): Date of the scheduled visit. *Required.*
- **Visit_Time__c** (Text): Time of the scheduled visit.
- **Visitor_Name__c** (Text): Name of the prospective buyer.
- **Visitor_Email__c** (Email): Email address of the visitor.
- **Status__c** (Text): Status of the visit (e.g., Scheduled, Completed, Cancelled).

SETUP > OBJECT MANAGER

Property Visit

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Fields & Relationships
13 Items, Sorted by Field Label

[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Lead	Lead__c	Lookup(Lead)		✓
Notes	Notes__c	Text Area(255)		
Property	Property__c	Master-Detail(Property)		✓
Property Visit Name	Name	Auto Number		✓
Status	Status__c	Picklist		
Visit Date	Visit_Date__c	Date		

<https://corfarm-7e4187d82d-dev-ed.developer.lightning.force.com/one/one.app#/setup/ObjectManager/011nl0000028sAR/FieldsAndRelationships/view>

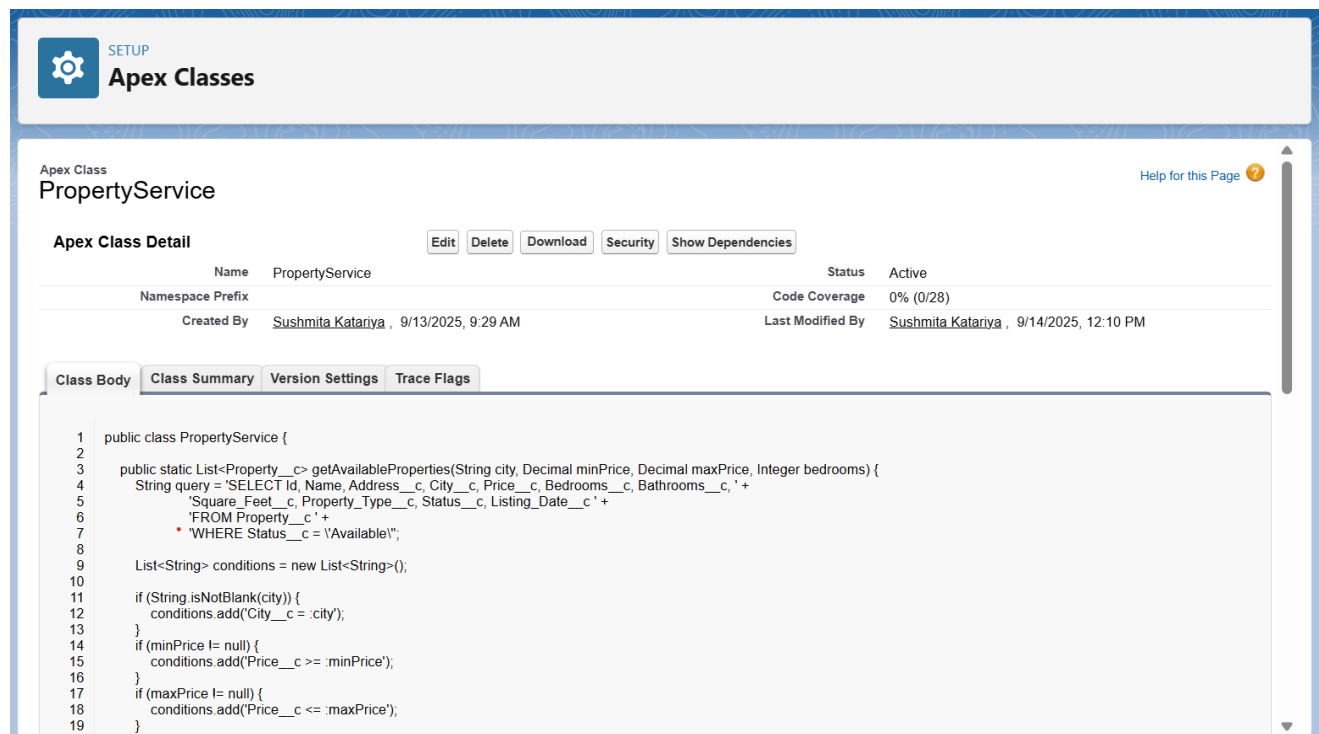
Apex Automation Logic

Key Apex classes were developed to implement core business logic:

- **PropertyService.cls:** Contains methods for:
 - Querying available properties based on filters (city, price, bedrooms).
 - Updating the status of properties in bulk.
 - Generating statistics on properties by city.
- **VisitScheduler.cls:** Contains methods for:
 - Checking for scheduling conflicts for property visits.
 - Sending confirmation emails for scheduled visits (logic placeholder).
- **Updated TerritoryAssignment.cls:** Enhanced the Phase 2 class to assign leads based on a more sophisticated postal code logic and mark the assigned territory on the lead.

Apex Trigger:

- **PropertyVisitTrigger.trigger:** A trigger on the Property_Visit__c object that automatically calls the VisitScheduler methods before insert or update to enforce business rules.




The screenshot displays the Salesforce 'Apex Classes' setup page. At the top, there's a 'SETUP' button and the title 'Apex Classes'. Below this, the 'Apex Class Detail' section for 'PropertyService' is shown. It includes buttons for 'Edit', 'Delete', 'Download', 'Security', and 'Show Dependencies'. A table provides details: Name (PropertyService), Status (Active), Namespace Prefix, Code Coverage (0% (0/28)), Created By (Sushmita Katariya, 9/13/2025, 9:29 AM), and Last Modified By (Sushmita Katariya, 9/14/2025, 12:10 PM). Below the table, there are tabs for 'Class Body', 'Class Summary', 'Version Settings', and 'Trace Flags'. The 'Class Body' tab is selected, showing the following Apex code:

```
1 public class PropertyService {
2
3     public static List<Property__c> getAvailableProperties(String city, Decimal minPrice, Decimal maxPrice, Integer bedrooms) {
4         String query = 'SELECT Id, Name, Address__c, City__c, Price__c, Bedrooms__c, Bathrooms__c, ' +
5             'Square_Feet__c, Property_Type__c, Status__c, Listing_Date__c ' +
6             'FROM Property__c ' +
7             'WHERE Status__c = \'Available\'';
8
9         List<String> conditions = new List<String>();
10
11         if (String.isNotBlank(city)) {
12             conditions.add('City__c = :city');
13         }
14         if (minPrice != null) {
15             conditions.add('Price__c >= :minPrice');
16         }
17         if (maxPrice != null) {
18             conditions.add('Price__c <= :maxPrice');
19         }
20     }
```








User Interface Setup

Custom tabs and page layouts were created to provide a user-friendly interface for managing properties and visits.


- **Tabs:** Created custom tabs for both Property__c and Property_Visit__c objects.
- **Layouts:** Created and assigned custom page layouts for both objects, organizing fields into logical sections.




Search...



ServiceHomeChatterAccountsContactsCasesReportsDashboardsPropertiesProperty Visits







 Properties

All



NewImportChange OwnerPrintable ViewAssign Label

Search this list...



2 Items • Sorted by Property Name • Updated a few seconds ago

☐ Property Name ↑


1☐ Greenwood Villa

2☐ Sunset Apartments








Sample Data Import

Sample property records were created to test functionality and demonstrate the application.


- Sample Properties:** Created multiple property records in different cities with varying prices, bedrooms, and statuses.



Search...



ServiceHomeChatterAccountsContactsCasesReportsDashboardsPropertiesProperty Visits

 Property

Greenwood Villa

New ContactEditNew Opportunity

RelatedDetails

Property Name

Greenwood Villa


Price

INR 750,000.00


Address

Downtown

Created By

 Sushmita Katariya, 9/16/2025, 7:09 AM


Owner

 Sushmita Katariya

Currency

INR - Indian Rupee

Last Modified By

 Sushmita Katariya, 9/16/2025, 7:09 AM

Next Steps: Phase 4

With the core data model and automation in place, the next phase will focus on advanced automation and user experience:

- **Flows & Processes:** Build declarative automation for property approval processes and status updates.
- **Lightning Web Components (LWC):** Develop custom UI components for a enhanced user experience.
- **Email Integration:** Implement the logic to send automated confirmation emails for visits.
- **Reporting & Dashboards:** Create reports and dashboards for management visibility into listings and visits.