

Real Estate CRM Project Documentation

Project Overview:

The Real Estate CRM is designed to streamline property management, lead tracking, and sales operations for real estate businesses. It helps agents and managers manage property listings, capture and nurture leads, schedule property visits, and track deals from start to closure. With features like customizable reports, dashboards, and dynamic access controls, the CRM ensures better decision-making and improved productivity. By addressing key business needs such as organized property inventory, efficient lead conversion, transparent sales tracking, and secure data management, this CRM enhances customer engagement and drives overall business growth.

Objectives:

The main goal of building the Real Estate CRM is to centralize and simplify the management of properties, leads, and client interactions within a single platform. By streamlining processes such as property listings, lead nurturing, visit scheduling, and deal tracking, the CRM reduces manual effort and improves overall efficiency. It enables agents to focus more on customer engagement while providing managers with real-time insights through reports and dashboards. From a business perspective, this leads to faster lead conversions, improved sales performance, better customer satisfaction, and greater transparency in operations—ultimately driving higher revenue and growth for the real estate business.



Real Estate Engagement & Lead Conversion System



Phase 1: Problem Understanding & Industry Analysis

1. Introduction

The real estate industry deals with thousands of property inquiries every day from websites, social media, and offline events.

Currently, many companies manage these inquiries manually using emails and Excel sheets. This leads to:

- Missed follow-ups
- Delayed property visits
- Slow deal closures
- Lack of proper reporting

Solution → Salesforce CRM

- Capture and store all leads in one system
- Assign leads automatically to agents

- Maintain property details in a structured way
 - Track customer visits and meetings
 - Manage deals from start to closure
 - Provide managers with real-time dashboards and reports
-

2. Requirements

Business Requirements

- Centralized system to capture all property leads
- Automatic lead assignment to sales agents
- Property catalog with location, type, and price
- Track visit schedules and reminders
- Deal pipeline management (Open → Negotiation → Closed)
- Simple dashboards for performance tracking

Functional (Admin + Developer)

- Web-to-Lead setup for capturing leads
- Custom **Property Object** with fields (price, type, location, status)
- Lead assignment rules or queues
- Opportunities for deal tracking
- Reports and dashboards for agents and managers

Non-Functional

- Easy to use for beginners and non-technical staff
- Secure with profiles, roles, and permissions
- Accessible on Salesforce mobile app

3. Stakeholders

Stakeholder	Role	Needs
Sales Agents	Handle new leads	Get leads quickly, view property details, schedule visits

Stakeholder	Role	Needs
Property Managers	Manage inventory	Add/update property details
Buyers	Customers	Quick response, visit confirmation
Sales Managers	Team leaders	View sales pipeline, monitor agent activity
Executives	Company owners	High-level reports and ROI
IT/Admin	System setup	Configure, manage, and maintain Salesforce

4. Business Process Mapping

Stage	Current (Manual)	Proposed (Salesforce Automated)
Lead Capture	Stored in Excel or emails	Captured automatically via Web-to-Lead
Lead Assignment	Manager manually assigns	Assignment rules / queues
Property Listing	Managed in spreadsheets	Custom Property object
Visit Scheduling	Handled via calls/emails	Events & Tasks in Salesforce
Deal Closure	Paper/manual tracking	Opportunities with stages
Reporting	Excel reports	Salesforce Dashboards

5. Industry Use Cases

- **Lead Management** → Capture and assign leads automatically
- **Property Management** → Store property details in Salesforce object
- **Visit Scheduling** → Track customer visits through Events/Tasks
- **Deal Tracking** → Use Opportunities to track deal stages
- **Reports & Dashboards** → Monitor sales and performance

Phase 1 Deliverables

- Requirements gathered and documented
- Stakeholders identified with their needs
- Current vs Salesforce process mapped
- Real estate use cases defined
- Optional apps explored

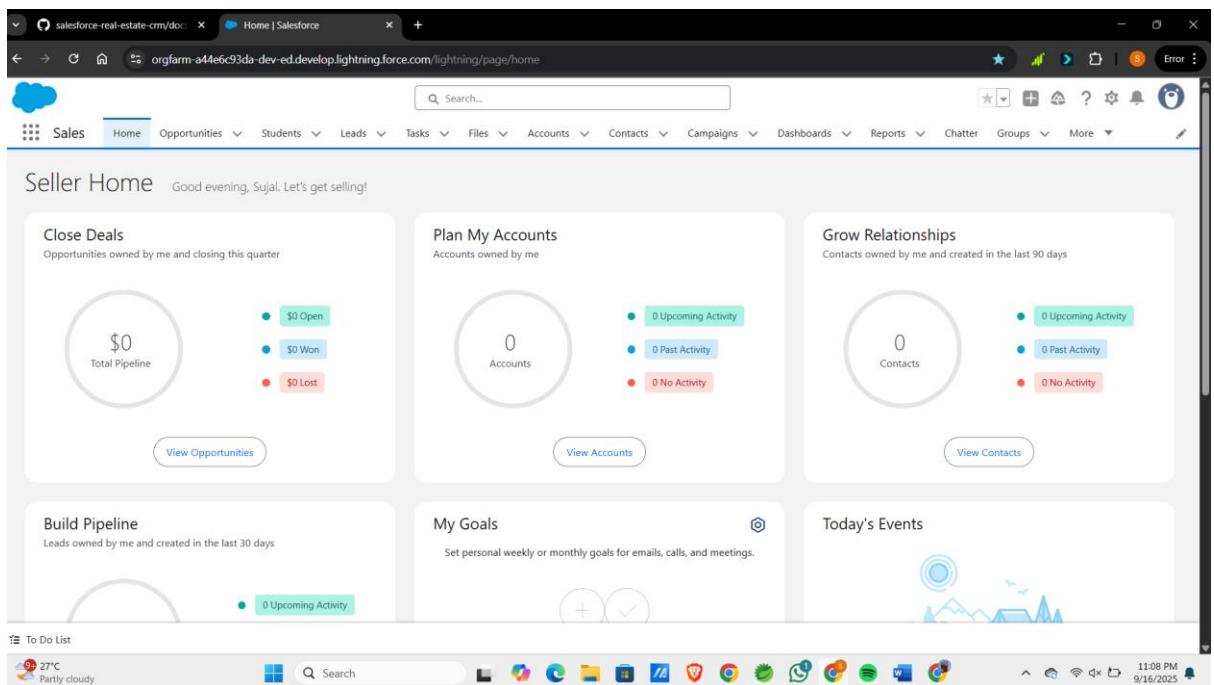
Phase 2: Org Setup & Configuration

◆ 1. Introduction

In this phase, we configure the Salesforce Developer Org to prepare the environment for building **SmartProperty CRM – Real Estate Engagement & Lead Conversion System**.

The setup ensures the org has correct company settings, security, user hierarchy, and access policies.

By the end of this phase, the system will be ready for **Phase 3: Data Modeling & Relationships**.



◆ 2. Salesforce Editions

- Using **Salesforce Developer Edition (Free)**
- Provides:
 - Custom Objects & Fields
 - App Builder & Lightning Apps
 - Users, Profiles, Roles, Permission Sets
 - Reports & Dashboards

The image contains two side-by-side screenshots of the Salesforce Setup interface, specifically the Company Information page.

Screenshot 1 (Top): This screenshot shows the initial view of the Company Information page. The sidebar on the left is collapsed, and the main content area displays the organization's profile for "SmartProperty CRM". It includes sections for Organization Detail, User Licenses, Permission Set Licenses, Feature Licenses, and Usage-Based Entitlements. A note at the bottom says "Didn't find what you're looking for? Try using Global Search."

Screenshot 2 (Bottom): This screenshot shows the same Company Information page but with the sidebar fully expanded. The sidebar lists various settings categories: Company Settings (selected), Business Hours, Calendar Settings, Public Calendars and Resources, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area remains the same as in Screenshot 1.

◆ 3. Company Profile Setup

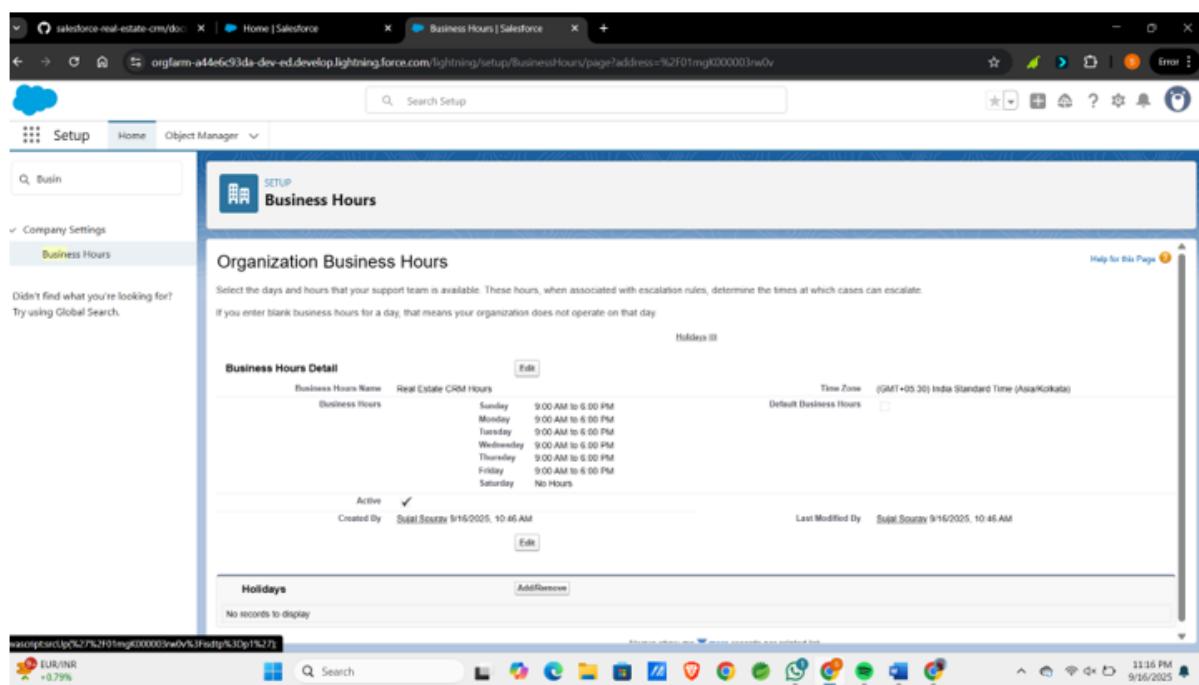
Navigation: Setup → Company Settings → Company Information

- Company Name → SmartProperty CRM
- Default Currency → INR (₹)
- Locale → English (India)
- Time Zone → (GMT +5:30) India Standard Time

◆ 4. Business Hours & Holidays

Navigation: Setup → Company Settings → Business Hours

- Business Hours → 9:00 AM – 6:00 PM, Monday to Saturday
- Holidays (Examples):
 - Republic Day (26th Jan)
 - Diwali
 - New Year (1st Jan)



◆ 5. Fiscal Year Settings

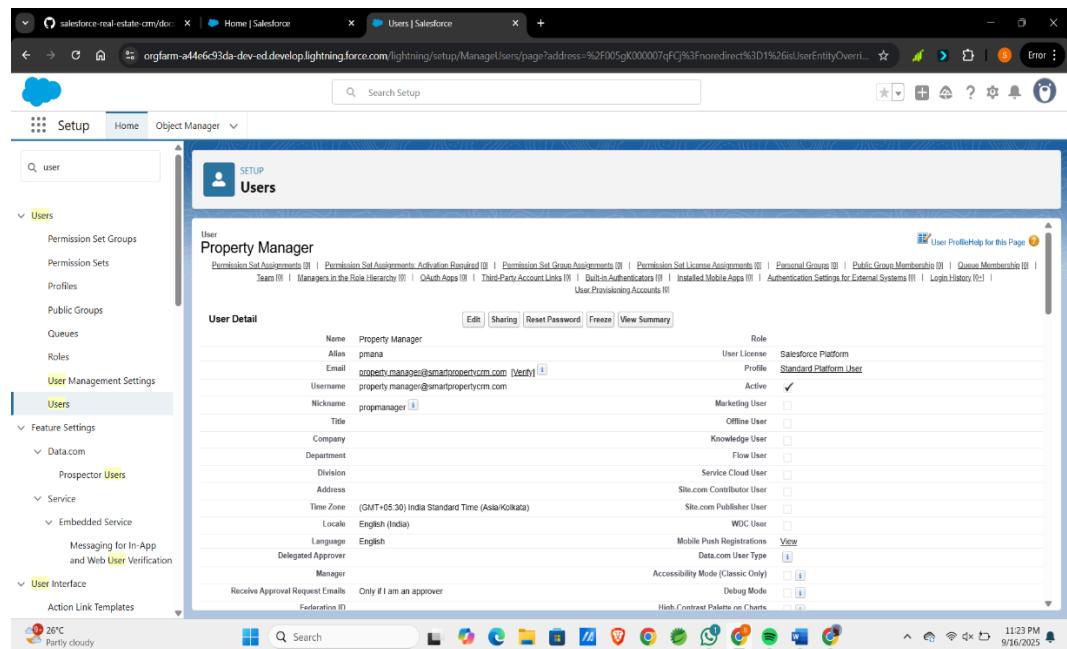
Navigation: Setup → Company Settings → Fiscal Year

- Standard Fiscal Year → April 1 to March 31

◆ 6. User Setup & Licenses

Navigation: Setup → Users → New User

- Created sample users:
 - Sales Agent → Standard Salesforce License
 - Property Manager → Salesforce Platform License
 - Sales Manager → Standard Salesforce License



◆ 7. Profiles

Navigation: Setup → Profiles

- Cloned **Standard User Profile** → **Sales Agent Profile**
- Gave CRUD access to: Leads, Opportunities, and (later) Property Object

Action	Profile Name	User License	Custom
Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

◆ 8. Roles (Hierarchy)

Navigation: Setup → Roles → Set Up Roles
Hierarchy Defined:

- Executive (Top level)
- Sales Manager
- Sales Agent

(Ensures managers can view their team's records.)

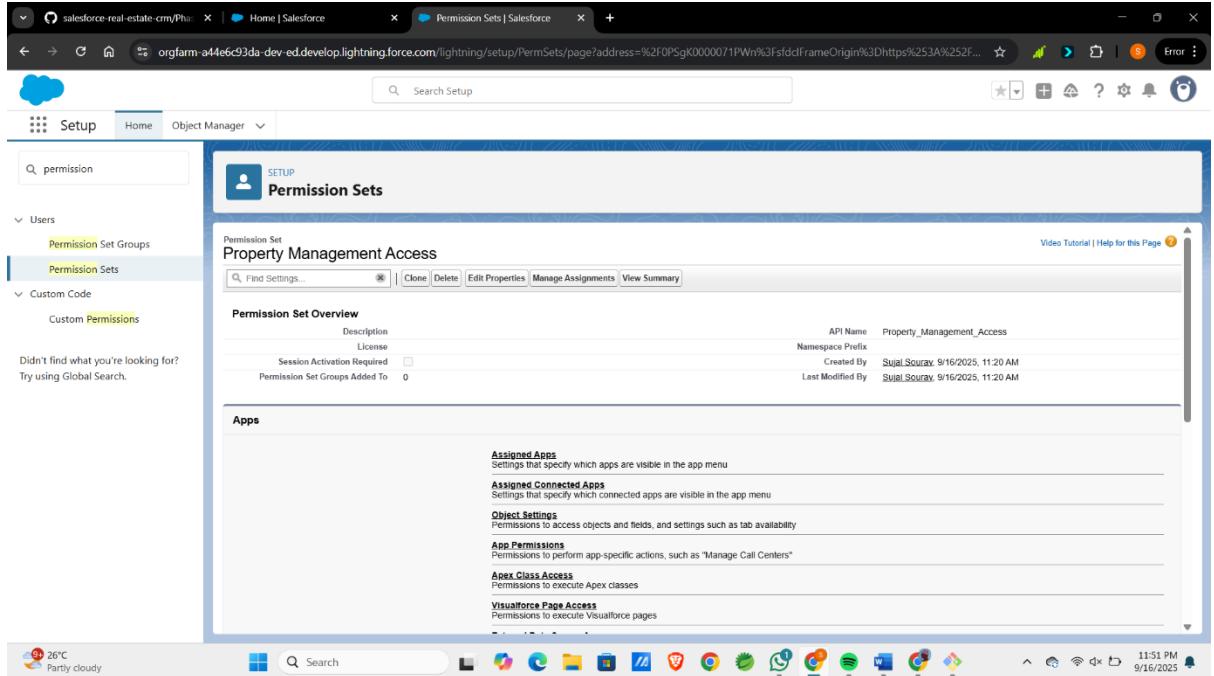
The screenshot shows the Salesforce Roles setup page. On the left, there's a sidebar with navigation links like Setup, Home, Object Manager, and a search bar. The main area is titled "Roles" and shows a tree view of the "Creating the Role Hierarchy". The tree starts with "SmartProperty CRM" which has "CEO" and "Executive" as children. "Executive" has "Sales Manager" as a child. Each node has "Edit | Del | Assign" options. At the bottom, there's a message: "Didn't find what you're looking for? Try using Global Search."

◆ 9. Permission Sets

Navigation: Setup → Permission Sets → New

- Created: **Property Management Access**

- CRUD access for Property Object (to be created in Phase 3)
- Assigned to Property Manager user



◆ 10. Organization-Wide Defaults (OWD)

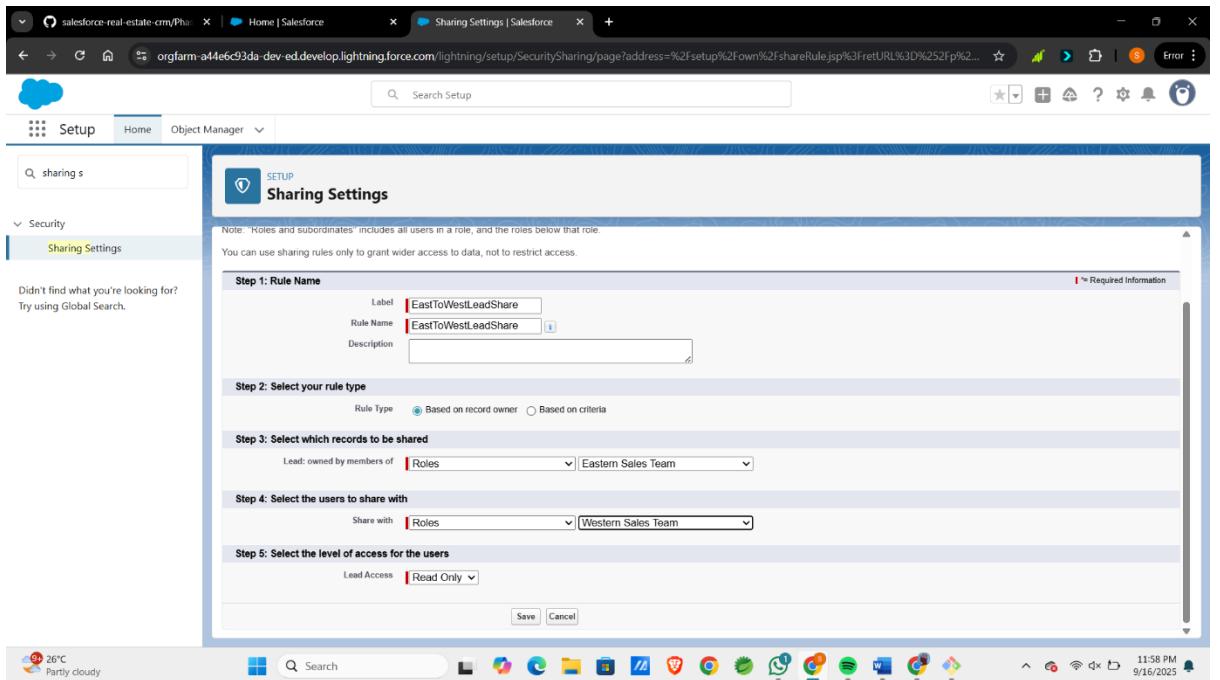
Navigation: Setup → Sharing Settings

- Leads → Private
- Opportunities → Private
- Property (custom object – Phase 3) → Public Read/Write

◆ 11. Sharing Rules

Navigation: Setup → Sharing Settings → New Sharing Rule

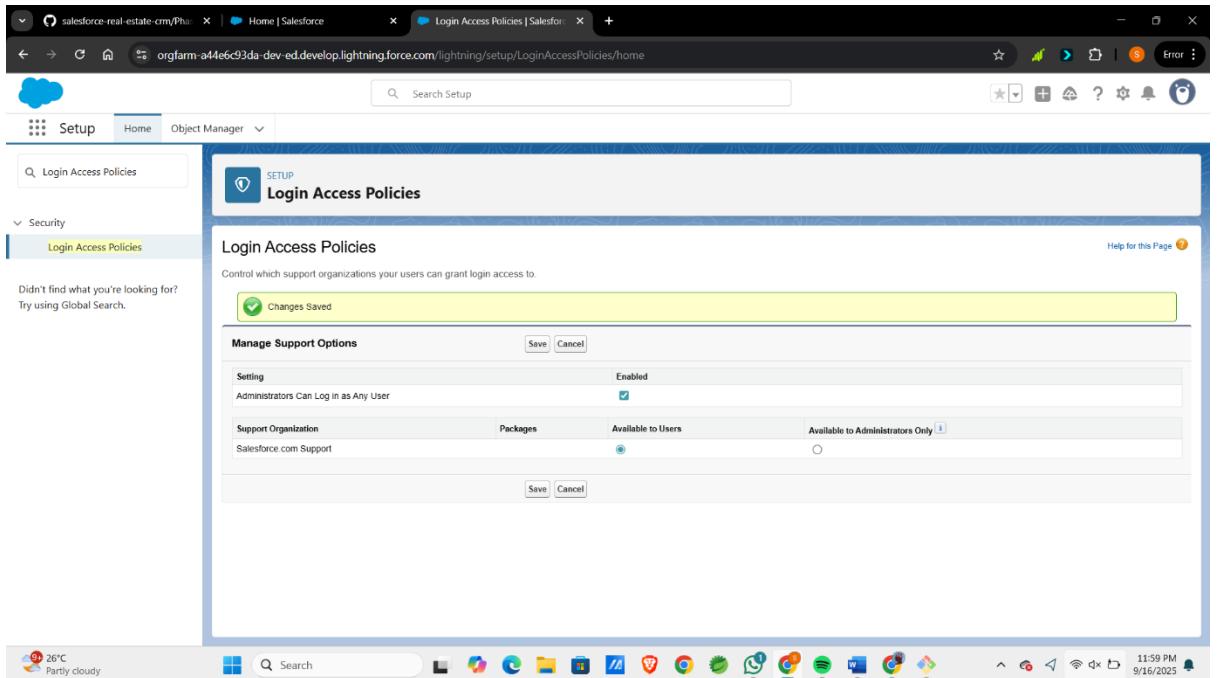
- Example: Share Leads owned by “East Team” with West Team



◆ 12. Login Access Policies

Navigation: Setup → Login Access Policies

- Enabled: **Administrators Can Log In as Any User**
- (Optional) Restricted logins by IP range for security



◆ **13. Dev Org Setup & Sandbox Usage**

- Working in **Developer Edition Org (free)**
- Sandboxes are **not available** in Developer Edition
- Practice done directly in Dev Org

◆ **14. Deployment Basics**

- Initial setup done directly in Dev Org
- Future deployment methods:
 - Change Sets (click-based)
 - SFDX CLI + GitHub (for advanced version control)

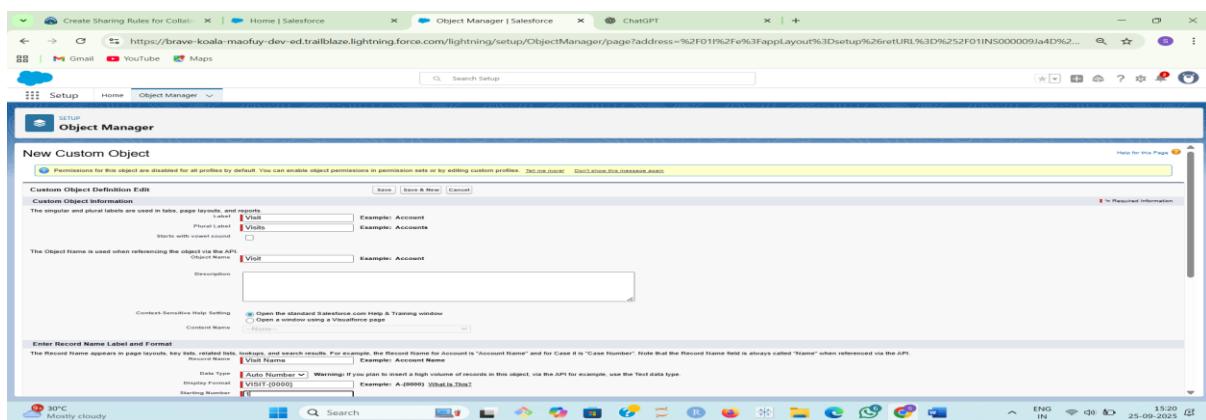
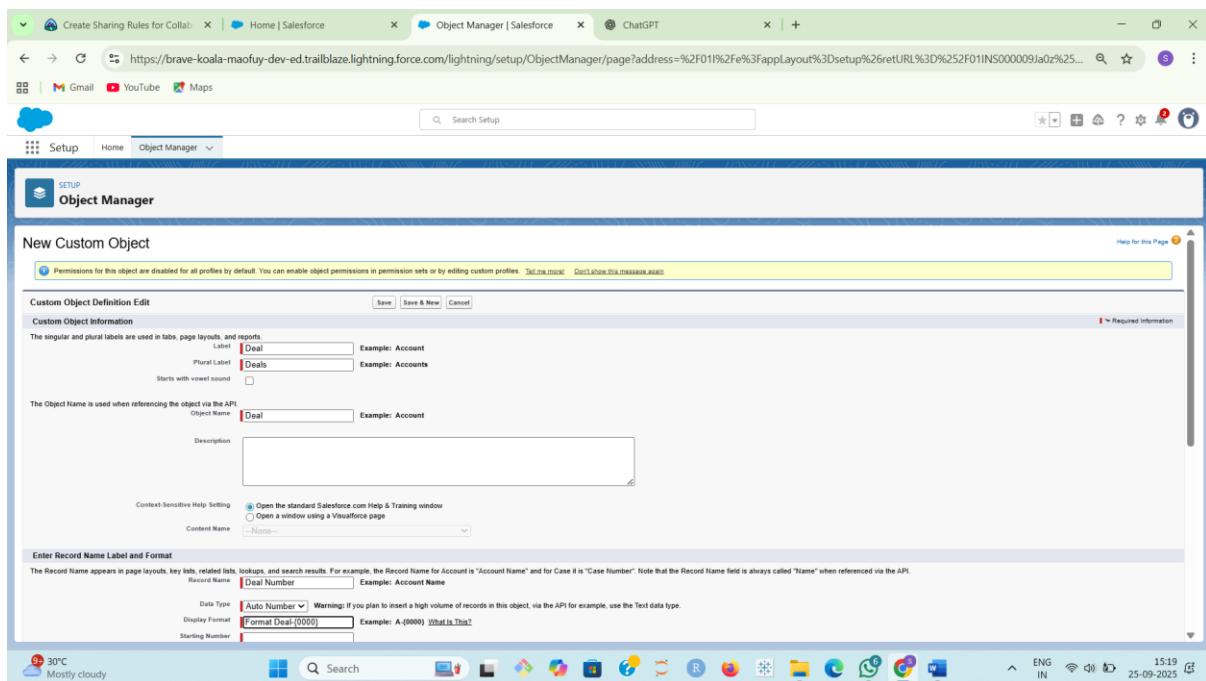
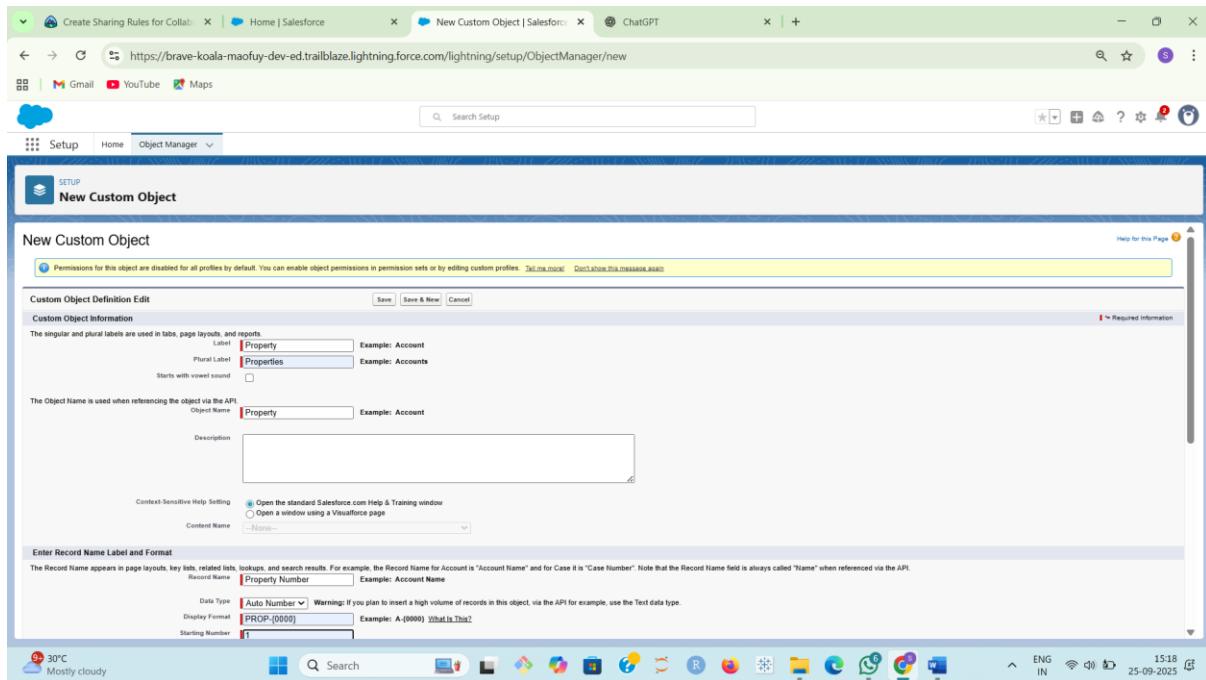
Phase 2 Deliverables

- Salesforce Developer Org created and verified
- Company profile updated (currency, locale, timezone)
- Business hours and holidays defined
- Fiscal year configured
- Users created (Agent, Manager, Property Manager)
- Profiles cloned and updated
- Roles defined in hierarchy
- Permission sets created
- OWD and Sharing Rules implemented
- Login access policies updated

Phase3-Data Modeling and Relationships phase:

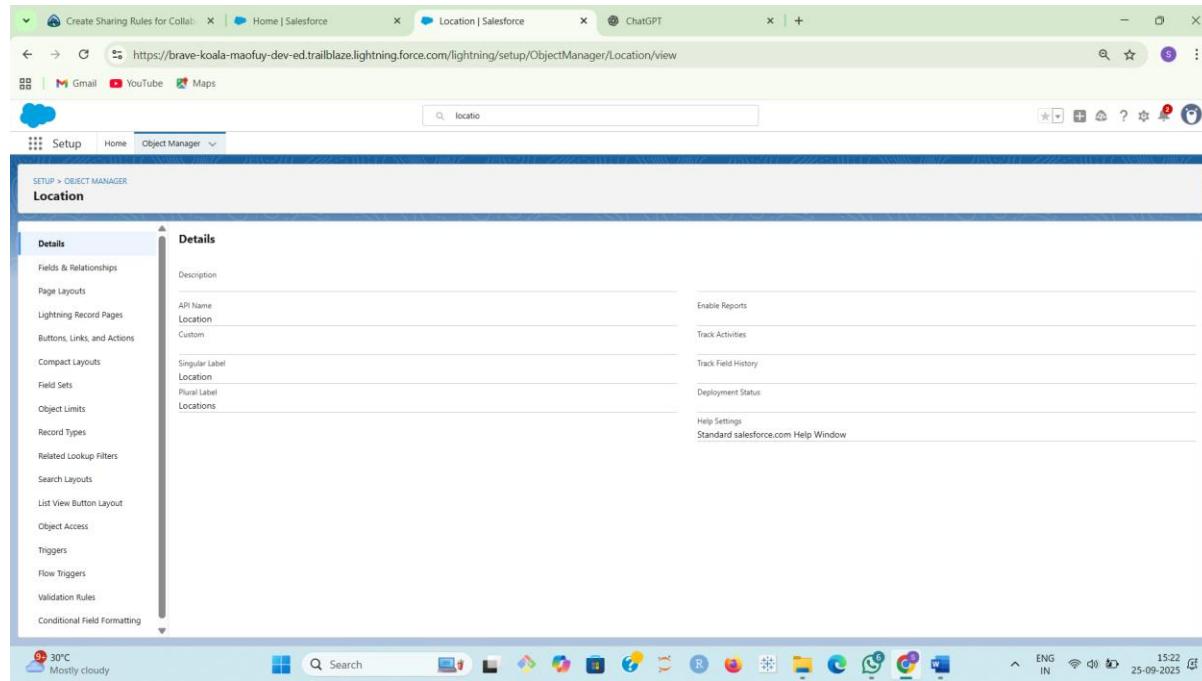
1. Standard & Custom Objects

- Standard: Contact (buyers, sellers, agents).
- Custom: Property, Visit/Appointment, Deal.



2. Fields

- Property: Location, Price, Size (sq ft), Status (Available, Sold, Under Negotiation).
- Visit/Appointment: Date, Time, Notes.
- Deal: Deal Value, Closing Date, Deal Status.



3. Record Types

- Property: “Residential” vs “Commercial.”
- Deal: “Rent” vs “Sale.”

4. Page Layouts

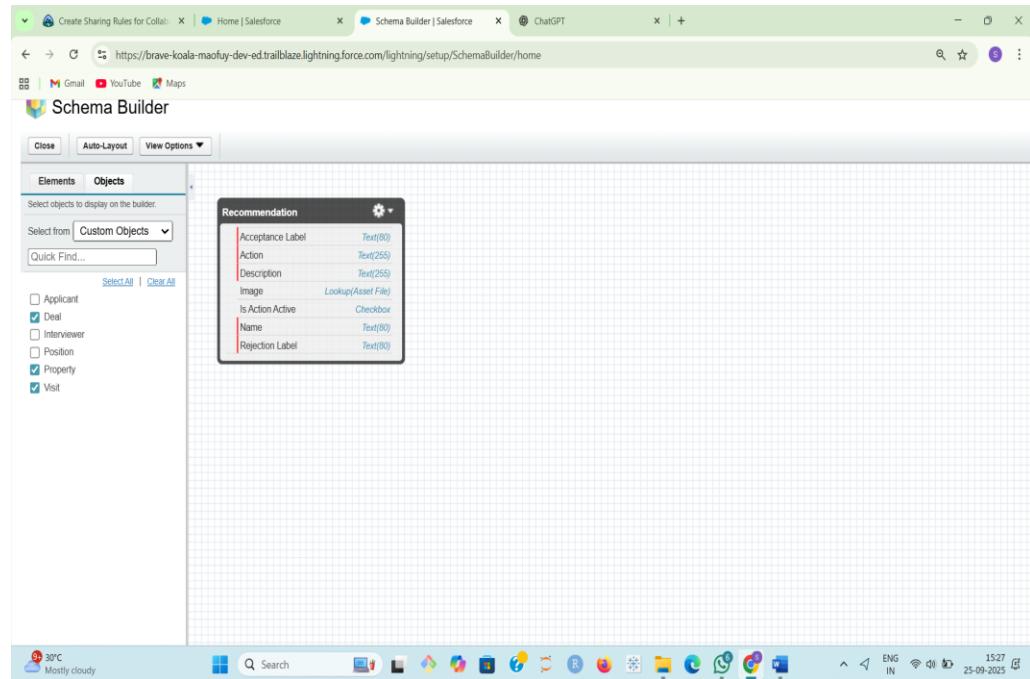
- Property page: Shows related visits and deals.
- Deal page: Shows related property and customer details.
- Contact page: Shows properties visited, deals closed.

5. Compact Layouts

- Mobile (Property): Location, Price, Status.
- Mobile (Deal): Deal Value, Closing Date, Status.

6. Schema Builder

- Used to visualize relationships among Property, Deal, Contact, Visit.



7. Lookup vs Master-Detail

- Property ↔ Deal → Lookup (a deal is associated with a property, but property can exist without a deal).
- Deal ↔ Contact → Lookup (a deal links to a buyer/seller).
- Visit ↔ Property → Lookup (a visit relates to a property, but property exists independently).

Profiles Edit View

Sharing Settings

Object	Default Internal Access	Default External Access
Lead	Public Read/Write/Transfer	Private
Account and Contract	Public Read/Write	Private
Contact	Controlled by Parent	Controlled by Parent
Order	Controlled by Parent	Controlled by Parent
Asset	Controlled by Parent	Controlled by Parent
Opportunity	Public Read/Write	Private
Case	Public Read/Write/Transfer	Private
Campaign	Public Full Access	Private
Campaign Member	Controlled by Campaign	Controlled by Campaign

Phase 4- Implementation – Real Estate CRM Project

1. Validation Rules

- Example: Property Price must be greater than 0.
- Example: Deal Closing Date must be after Visit Date.

The screenshots show the Salesforce Setup interface. The top screenshot displays the 'Validation Rules' page for the 'Deal' object, showing a table with one row labeled 'No items to display.' The bottom screenshot shows the 'Validation Rule Edit' screen for a rule named 'Price_Must_be_positive'. The formula field contains 'Objecttype.deal__c.Fields.Name'.

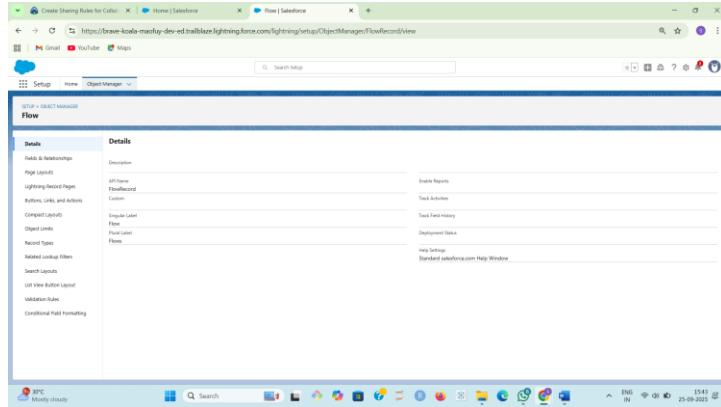
2. Approval Process

- Deal Value > ₹50,00,000 → Send for Manager approval.

The screenshot shows the 'Approval Processes' screen in the Salesforce Setup interface. It displays a brief introduction to Flow Approval Processes and a 'Get Started' button.

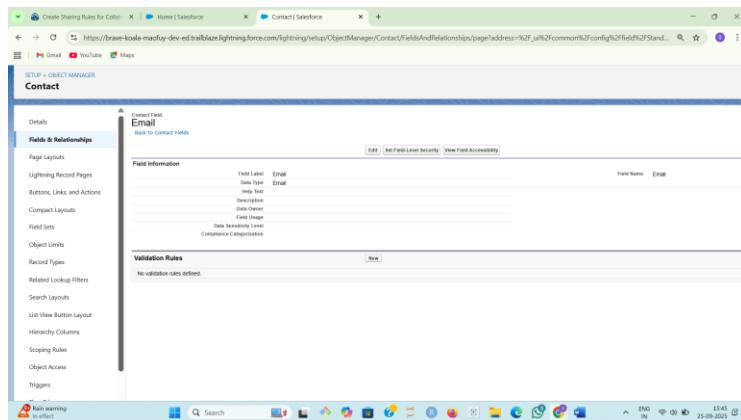
3. Flow Builder

- Record-triggered Flow: Auto-calculate commission percentage when a deal is created/closed.
- Screen Flow: Guided property booking/visit form for agents.



4. Email Alerts

- Send confirmation email to customer after deal approval.



5. Field Updates

- After approval, Deal Status = “Closed Won.”

6. Tasks

- Create a task for the agent to schedule a property visit or follow-up with the buyer.

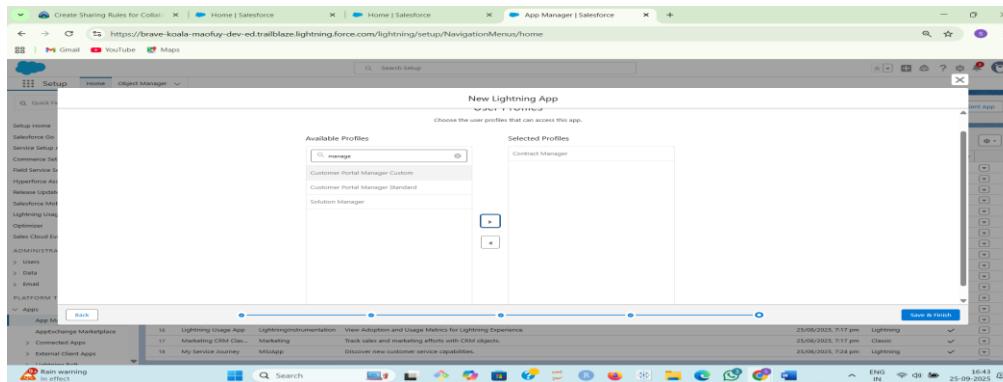
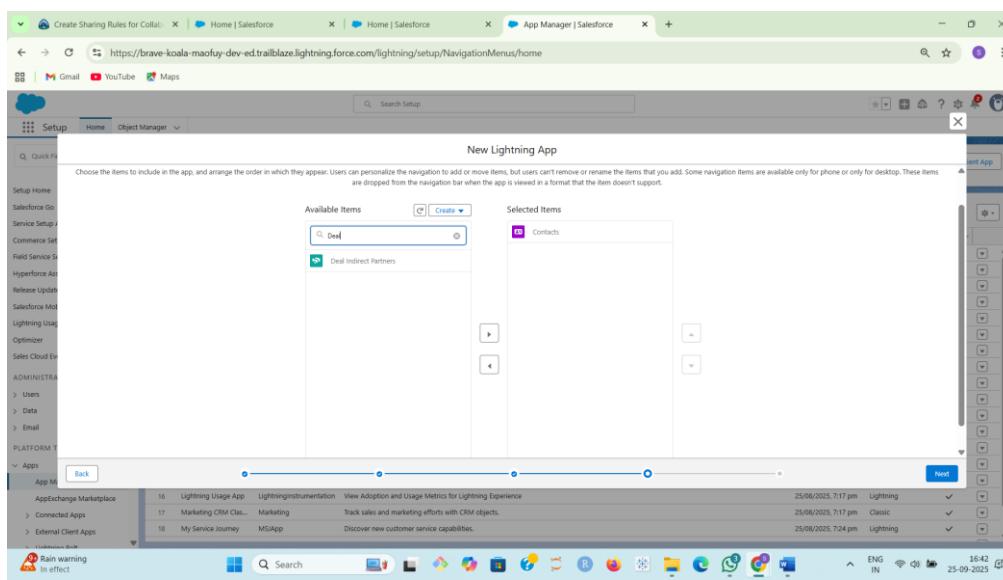
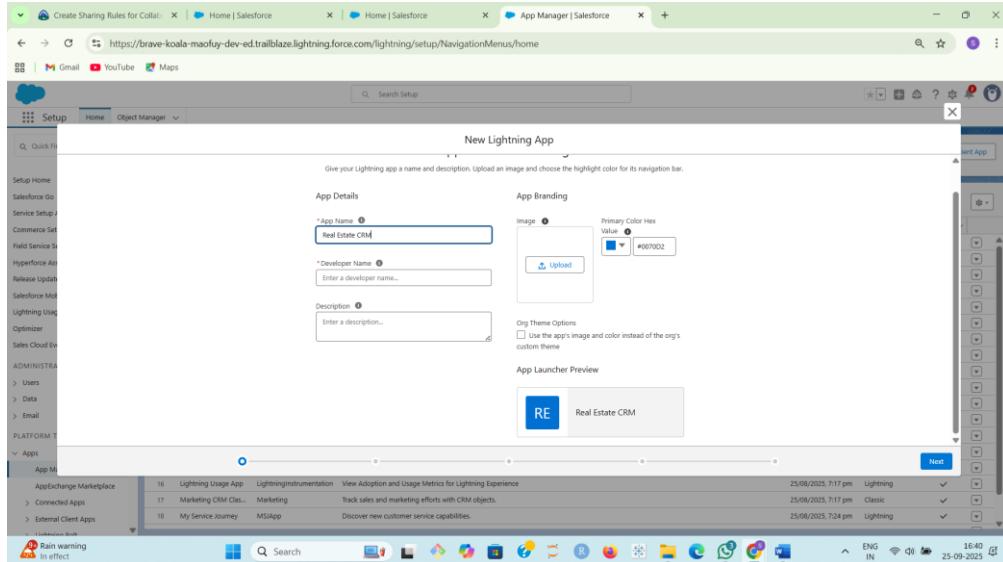
7. Custom Notifications

- Send in-app notification to the agent when a high-value deal is approved.

Phase 6: User Interface Development – Real Estate CRM

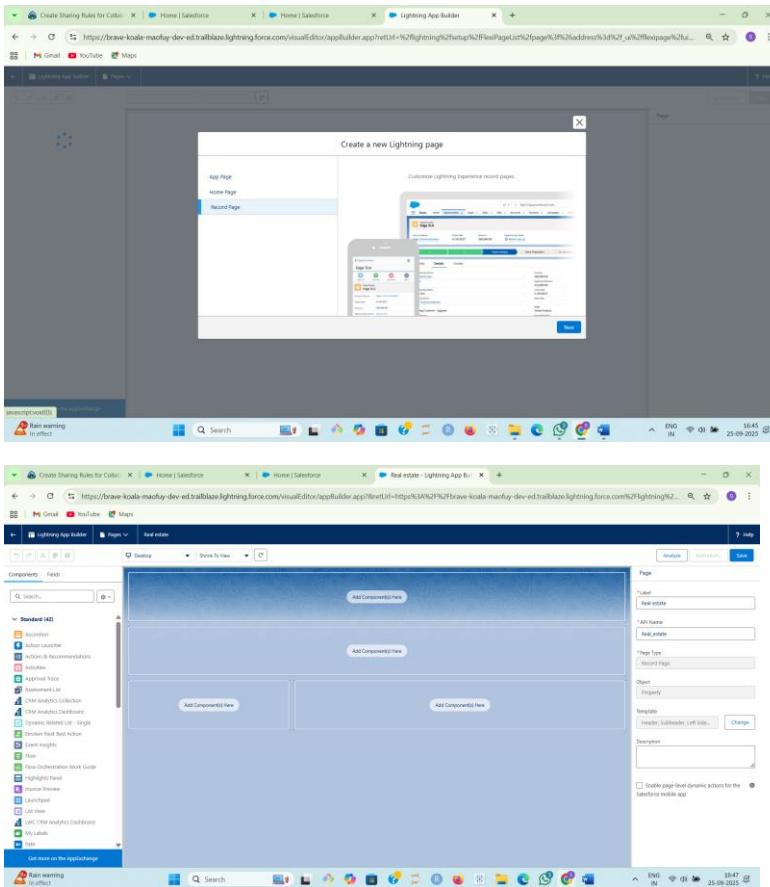
1. Lightning App Builder

- Create a “Real Estate CRM” app to manage properties, clients, deals, and site visits.



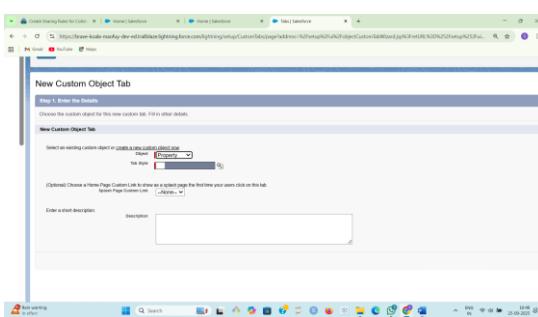
2. Record Pages

- Property Page → Display key details (location, price, availability, property type).
- Show related lists: Enquiries and Site Visits linked to the property.
- Client Page → List of enquiries, visits, and deals related to the client.



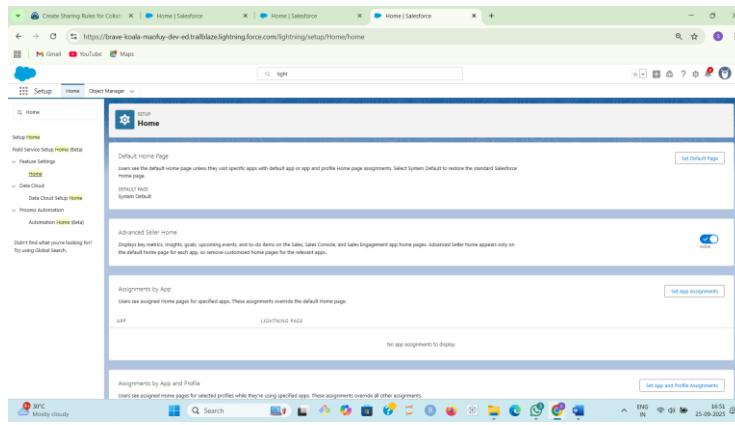
3. Tabs

- Add Properties, Clients, Enquiries, Site Visits, and Deals tabs for easy navigation.



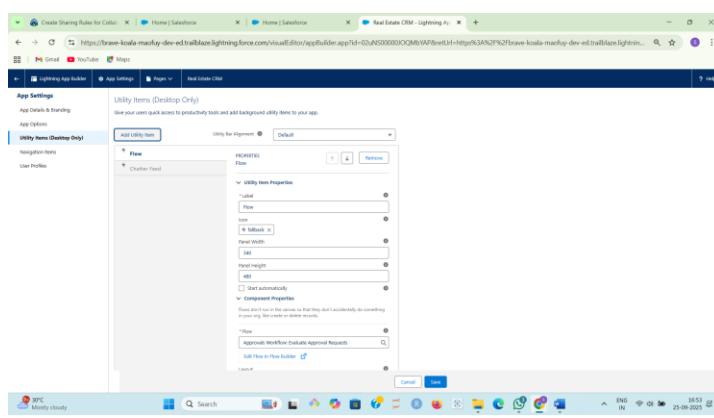
4. Home Page Layouts

- Dashboard with:
 - Total Active Properties
 - Upcoming Site Visits
 - Conversion Funnel (Enquiries → Visits → Deals)
 - Top Performing Agents



5. Utility Bar

- Quick actions:
 - “New Enquiry” (fast client entry form).
 - “Schedule Site Visit” shortcut.



6. Lightning Web Component (LWC)

- Component: Search Properties by filters (location, budget, property type, availability).
- Display search results in a datatable with actions like *View Details*, *Book Visit*.

7. Apex with LWC

- Imperative Apex call → create new Enquiry or Site Visit record when a client shows interest in a property.

8. Events in LWC

- Child component (Search Form) → passes search criteria (budget, location) to parent.
- Parent component (Results) → displays matching properties dynamically.

9. Wire Adapters

- Wire available Property records from Salesforce to display real-time listings in the UI.

10. Imperative Apex Calls

- On “Book Site Visit” → call Apex method to create a Site Visit record linked to property & client.

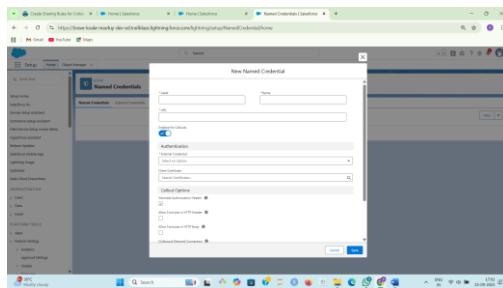
11. Navigation Service

- After booking a visit or finalizing a deal → navigate directly to the related Enquiry / Deal record page for seamless workflow.

Phase 7: Integration & External Access – Real Estate CRM

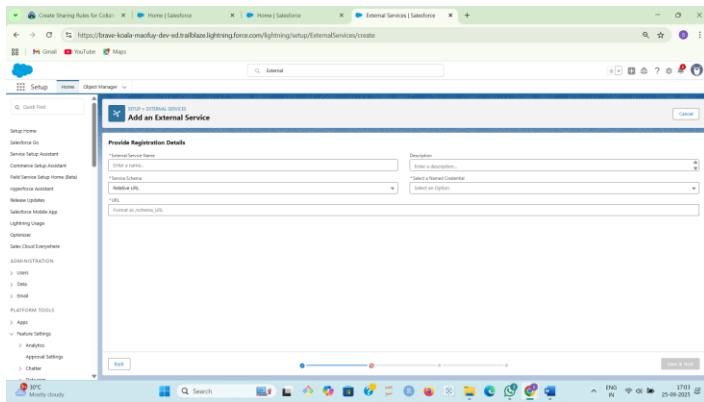
1. Named Credentials

- Store Property Listing API or Government Land Registry API credentials securely for safe integrations.



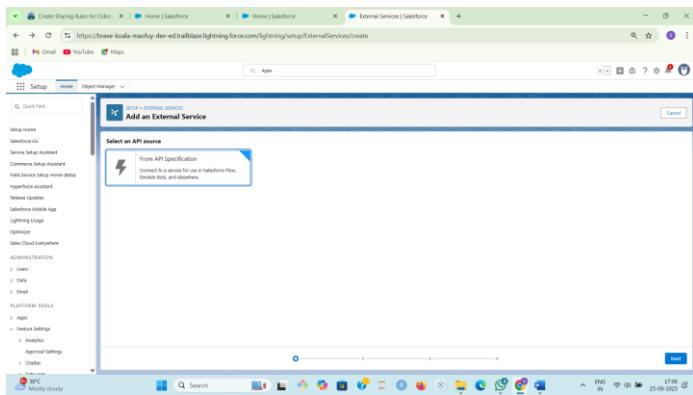
2. External Services

- Connect with Mortgage/Loan Verification Services or Property Valuation APIs.



3. Web Services (REST/SOAP)

- REST callout: Fetch latest property valuation or ownership details from an external registry.
- SOAP callout: Verify legal documents of a property.

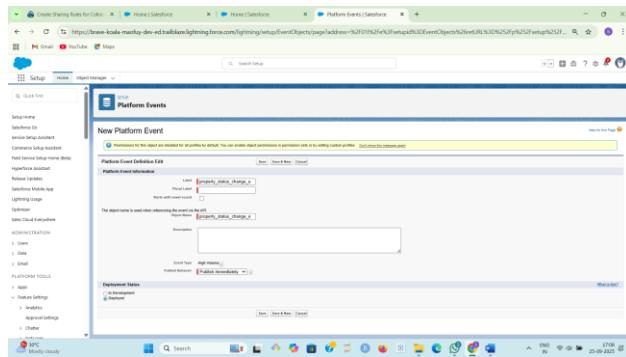


4. Callouts

- Triggered when:
 - A new Property is added → call external API to verify property details.
 - A Deal is created → trigger loan/mortgage eligibility check.

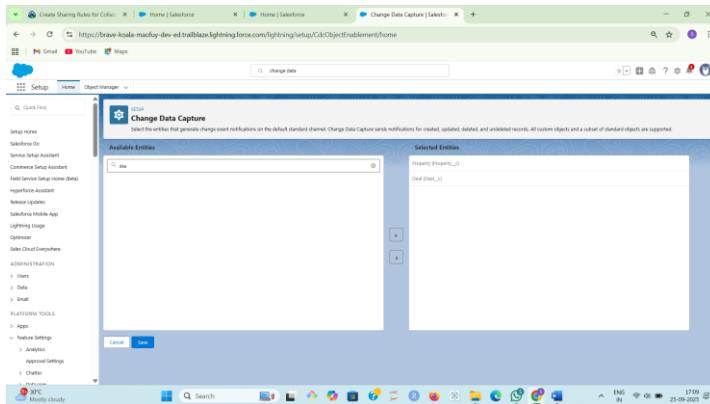
5. Platform Events

- Publish event if:
 - A Property Status changes (e.g., Available → Booked → Sold).
 - A Site Visit is canceled and notify external calendar/integration system.



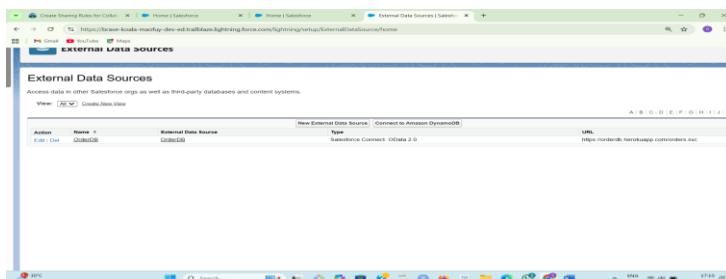
6. Change Data Capture (CDC)

- If Property details (price, availability) or Deal status (Pending → Closed) is updated → notify connected portals or partner systems.



7. Salesforce Connect

- Connect to external Property Management Databases if real estate listings are maintained outside Salesforce.



8. API Limits

- Monitor API calls/day especially when syncing with:
 - Multiple Property Portals
 - Bank Loan/Mortgage services

- Government verification systems

9. OAuth & Authentication

- If clients log in via a Real Estate Customer Portal, use OAuth for secure authentication.
- Enable partner brokers to securely access shared property data.

The screenshot shows the 'Lightning Experience App Manager' page within the Salesforce Setup Home. The left sidebar lists various setup categories like 'Commerce Setup Assistant', 'Salesforce DX', 'Data', 'Email', etc. The main content area displays a table of installed apps, including their names, developer names, descriptions, last modified times, app types, and status. Key entries include 'Insights' (Developer Name: 'Insight'), 'Force.com Migration Tool' (Developer Name: 'Force.com Migration Tool'), and several 'Lightning' and 'Classic' apps like 'App Launcher', 'Approvals', 'Automation', 'Community', 'Content', 'Data Manager', 'Database Bulk', 'Database Partner', 'External Content', 'External Orders', 'Force.com IDE', 'Lightning User App', 'Marketing Cloud', and 'My Service Journeys'.

10. Remote Site Settings

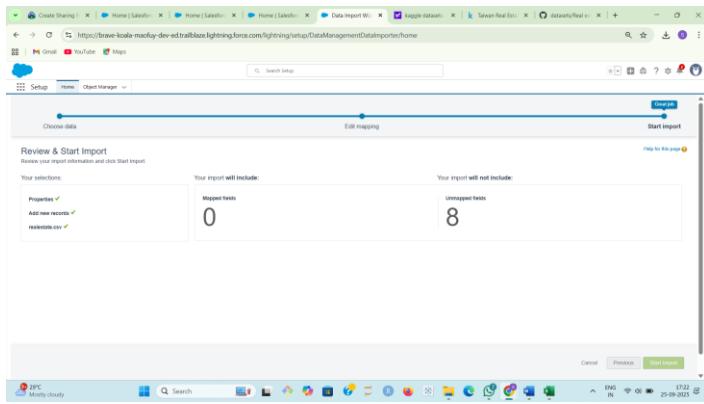
- Allow callouts to:
 - External listing portals
 - Government property verification domains
 - Bank/Mortgage APIs

The screenshot shows the 'Remote Site Settings' page within the Salesforce Setup Home. The left sidebar is identical to the previous screenshot. The main content area shows a 'Remote Site Edit' form. It has fields for 'Remote Site Name' (set to 'RE'), 'Remote Site URL' (set to 'http://www.realestate.com'), 'Disable Preferred Security', 'Description' (with a note about using the URL from salesforce.com), and an 'Active' checkbox which is checked. At the bottom are 'Save' and 'Cancel' buttons.

Phase 8: Data Management & Deployment – Real Estate CRM

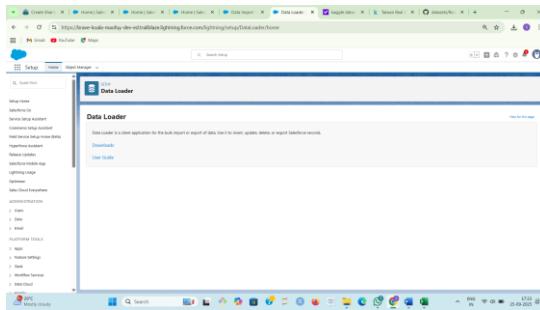
1. Data Import Wizard

- Import 50 demo Property records (location, price, type, status).



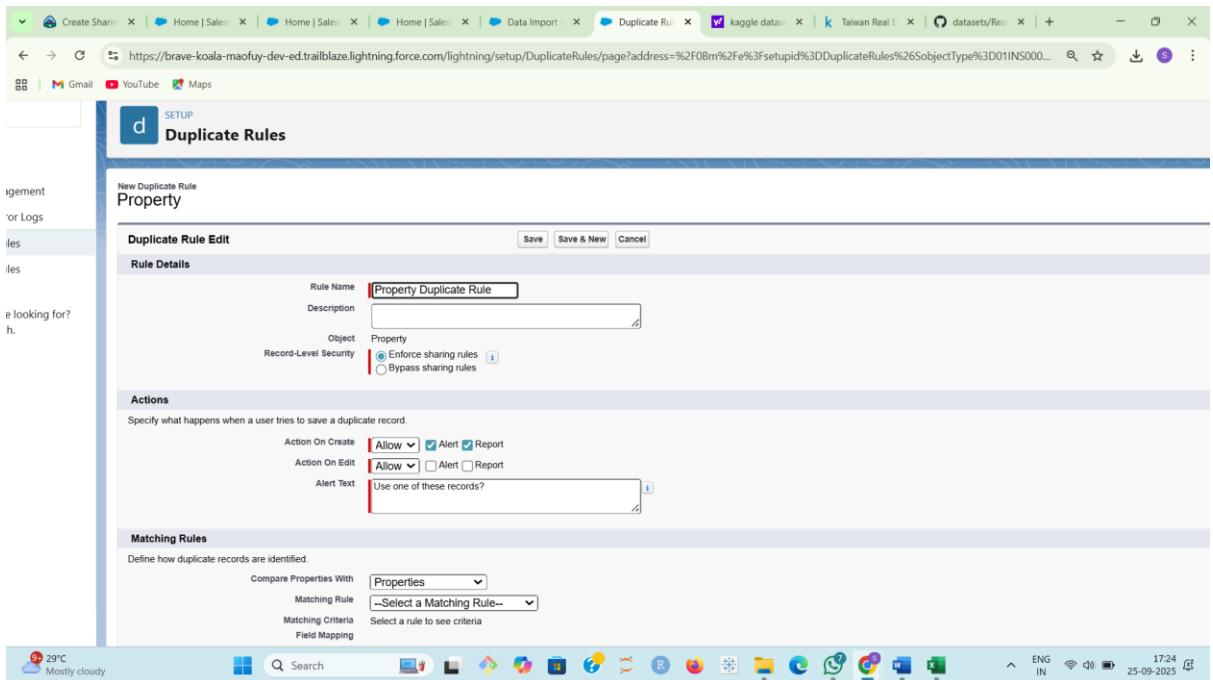
2. Data Loader

- Import bulk Enquiries, Site Visits, and Deals for testing large datasets.



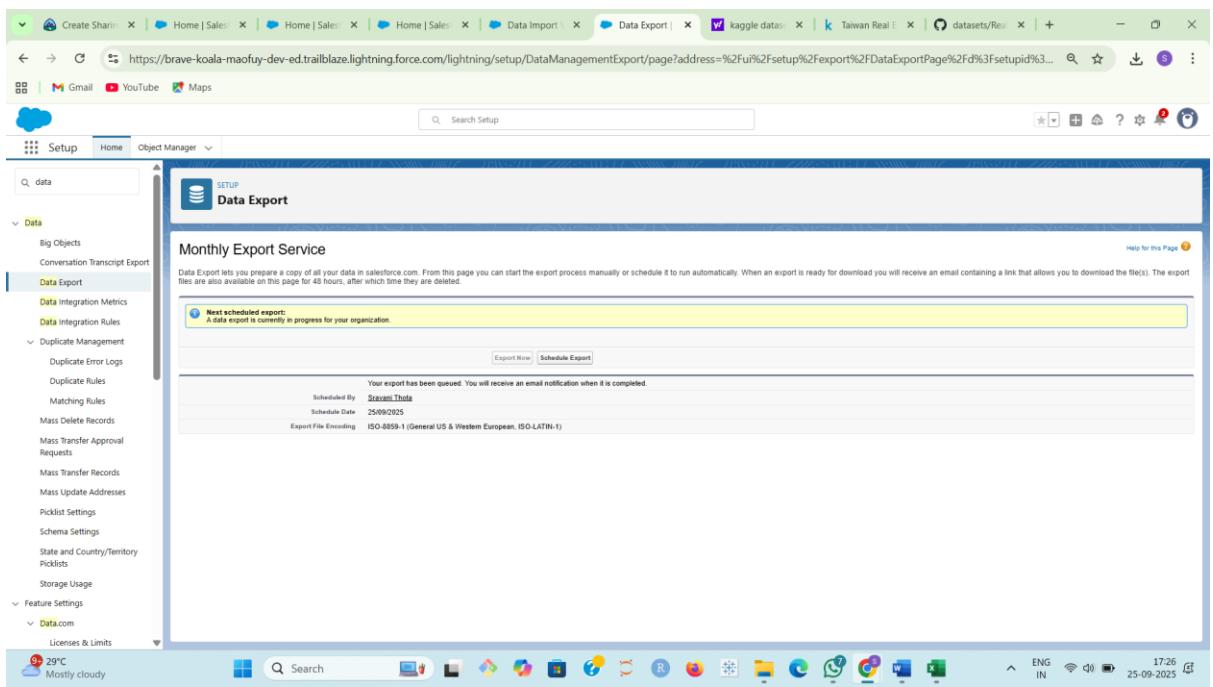
3. Duplicate Rules

- Prevent duplicate Property or Client entries (e.g., same property listed twice, or same client registered with multiple emails).



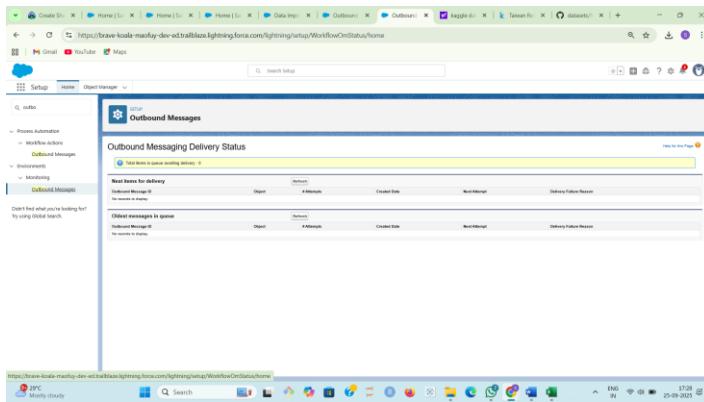
4. Data Export & Backup

- Weekly backup of all Properties, Clients, Enquiries, Site Visits, and Deals to ensure recovery in case of data loss.



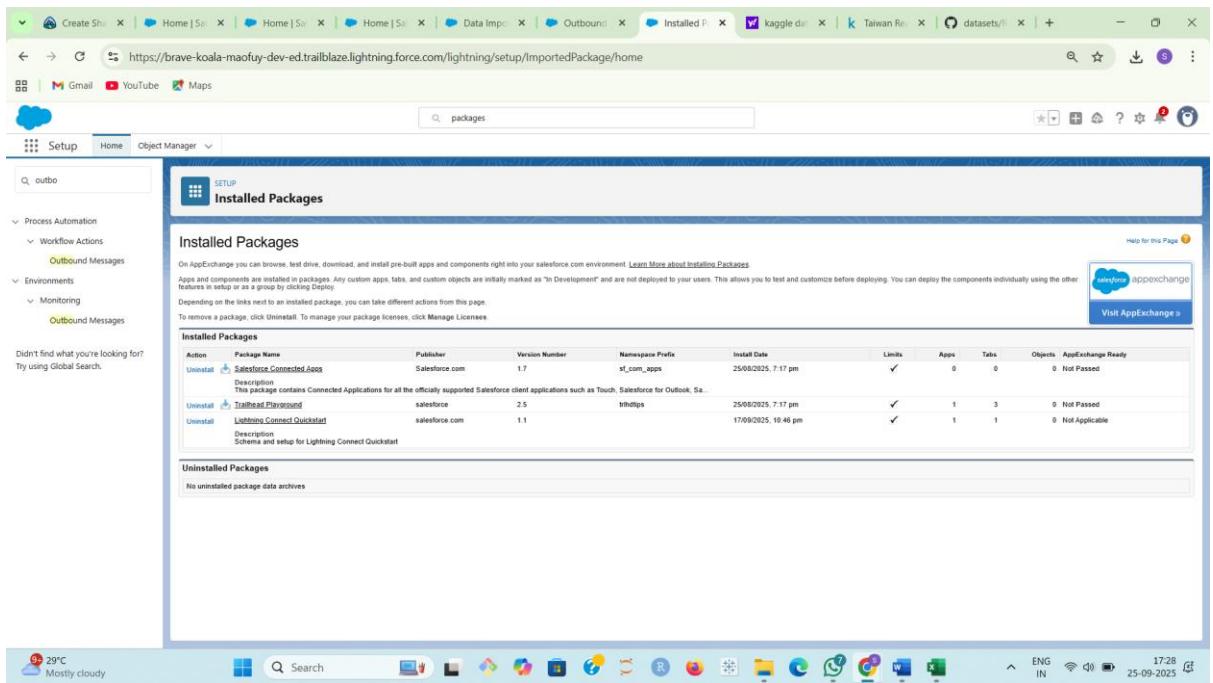
5. Change Sets

- Move custom objects, fields, record pages, and automation from Sandbox → Production.



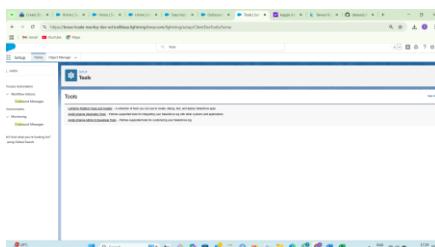
6. Unmanaged vs Managed Packages

- **Unmanaged:** Internal deployment for customization.
- **Managed:** If the Real Estate CRM needs to be published on AppExchange for other realtors/agencies.



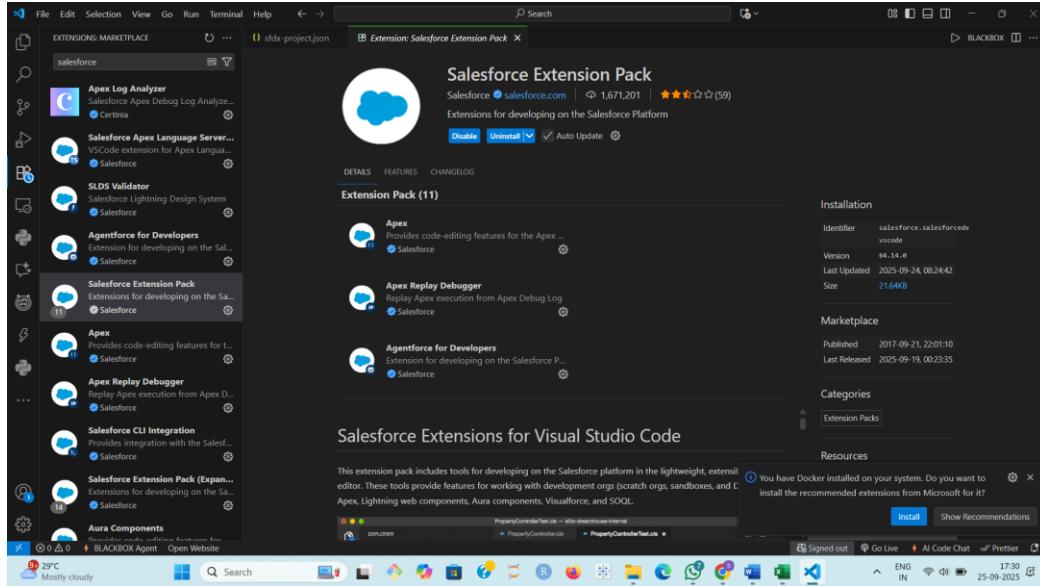
7. ANT Migration Tool

- Use command-line deployment for moving metadata in bulk between orgs.



8. VS Code & SFDX

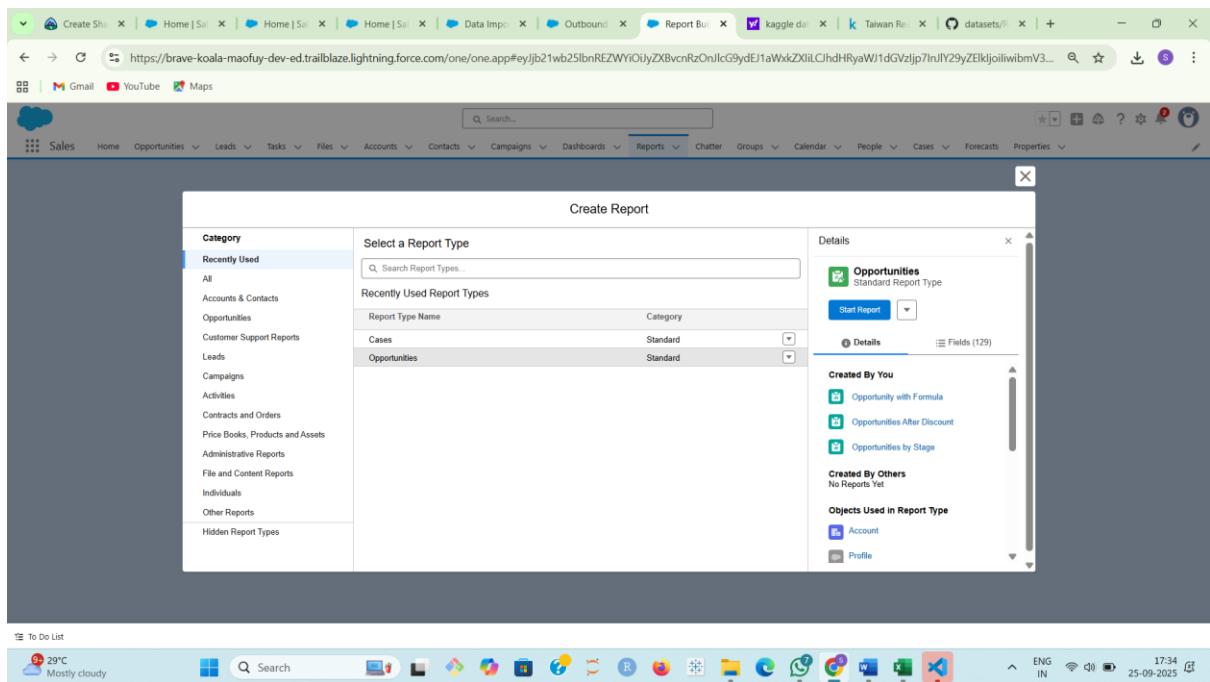
- Enable developer-friendly deployments with version control (Git) and automated scripts for continuous integration & delivery (CI/CD).



Phase 9: Reporting, Dashboards & Security Review

1. Reports

- Property Listings by Status (Available, Sold, Rented).
- Revenue by Property Type (Residential, Commercial).
- Lead Conversion Report (Leads → Deals).
- Agent Performance (Deals Closed, Visits Completed).



2. Report Types

- Custom report: Property + Visit Scheduling + Deals.

New Custom Report Type

1 Define the Custom Report Type

Select Primary Object

Select the object that is the focus of reports created with this report type.

*Primary Object: Opportunities

Properties

Details

*Display Label: Enter label...

*API Name: Enter API name...

*Description: Enter description...

Note: Description will be visible to users who create reports.

*Store in Category: Select a category...

Set Availability

3. Dashboards

- Property Portfolio Dashboard.
- Sales & Revenue Dashboard.
- Agent Performance Dashboard.

The screenshot shows the Salesforce Lightning interface with the 'Property Portfolio Dashboard' open. The dashboard contains a chart titled 'Opportunities After Discount' showing the sum of amounts for various opportunities. The chart has a y-axis labeled 'Opportunity ID' and an x-axis labeled 'Sum of Amount' with ticks at ₹200k, ₹150k, ₹100k, ₹50k, and ₹1m. The data points are represented by blue bars with labels indicating their exact value. Below the chart is a large, empty grid area for other dashboard components. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, Properties, and a 'Widget' button. The bottom taskbar shows various application icons and system status indicators.

4. Dynamic Dashboards

- Each Agent sees only their leads, visits, and deals.

The screenshot shows the Salesforce Lightning interface with the 'Dashboards' page open. The left sidebar lists categories such as DASHBOARDS, FOLDERS, and FAVORITES. The main content area displays a table of dashboards with columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. One dashboard, 'Property Portfolio Dashboard', is listed under the 'Recent' section. The bottom taskbar shows various application icons and system status indicators.

4. Sharing Settings

- Leads & Deals private, Properties public.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. It displays sharing rules for various objects. A specific rule for 'Customer financial details' is highlighted in blue.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Access	Private	Private	✓

5. Field Level Security

- Hide “Customer Financial Details” from Agents.

The screenshot shows the 'Custom Field Definition Detail' page for a custom field named 'Customer financial details'. The field is defined on the 'Deal' object and is a checkbox type.

Field Label	Customer financial details	Object Name	Deal
Field Name	Customer_financial_details	Data Type	Checkbox
API Name	Customer_financial_details_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Shravani Thota, 25/09/2025, 5:46 pm	Modified By	Shravani Thota, 25/09/2025

General Options
Default Value: Unchecked

Field Dependencies
No dependencies defined.

Validation Rules
New

6. Session Settings

- Timeout after 30 mins of inactivity.

Session Settings

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value: 30 minutes

Disable session timeout warning popup
 Force logout on session timeout

Session Settings

Lock sessions to the IP address from which they originated
 Lock sessions to the domain in which they were first used
 Terminate all of a user's sessions when an admin resets that user's password
 Force relogin after Login-As-User
 Require httpOnly attribute
 Use POST requests for cross-domain sessions
 Enforce login IP ranges on every request
 When embedding a Lightning application in a third-party site, use a session token instead of a session cookie

Extended use of IE11 with Lightning Experience

EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED
AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE RESOLVED.

Caching

Enable caching and autocomplete on login page

7. Login IP Ranges

- Restrict agents to office or authorized IP ranges.

Profiles

Profile Edit: Agent profile

Name: Agent profile
User License: Analytics Cloud Integration User
Description:

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Playground Starter (standard_Playground_Starter)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	Real Estate CRM (Real_Estate_CRM)	<input type="checkbox"/>	<input type="radio"/>
External Orders (External_Orders)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>
Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

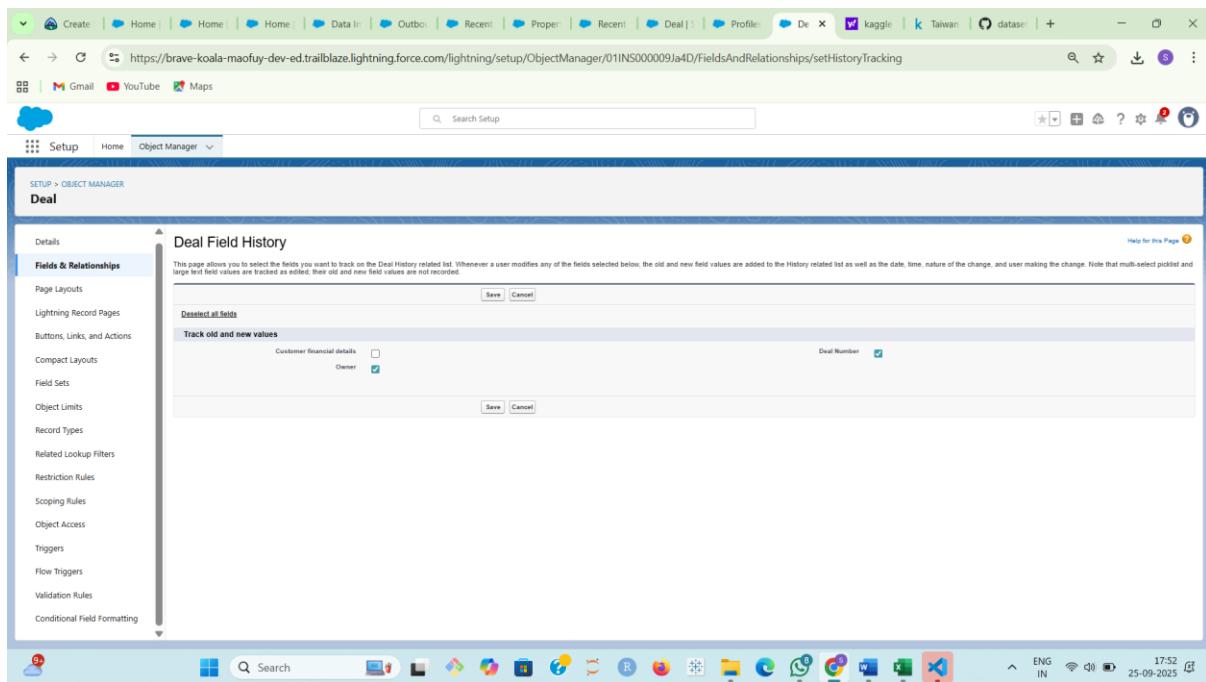
Connected App Access

	Ant Migration Tool	DataLoader Bulk	DataLoader Partner	Force.com IDE	Salesforce for Outlook	Salesforce Mobile Dashboards	Salesforce Touch	Workbench
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

Service Provider Access

9. Audit Trail

- Track who made changes to Leads, Properties, and Deals.



Phase 10: Final Presentation & Demo Day

1. Pitch Presentation
 - o Problem → Lack of organized property & lead management.
 - o Solution → Real Estate CRM with lead tracking, property management, visit scheduling, and deal closure.
 - o Benefits → Improved sales efficiency, better customer engagement, transparent reporting.
2. Demo Walkthrough
 - o Show creating a new lead and assigning to an agent.
 - o Schedule a property visit and track status.
 - o Convert lead → deal and update property status (Sold/Rented).
 - o Generate revenue & agent performance report.
3. Handoff Documentation
 - o Share system design document.
 - o Provide user guide for agents and managers.
4. LinkedIn/Portfolio Project Showcase
 - o Publish project summary with screenshots/demos.
 - o Highlight features like dashboards, dynamic reports, and security controls.

