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

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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

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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

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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

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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

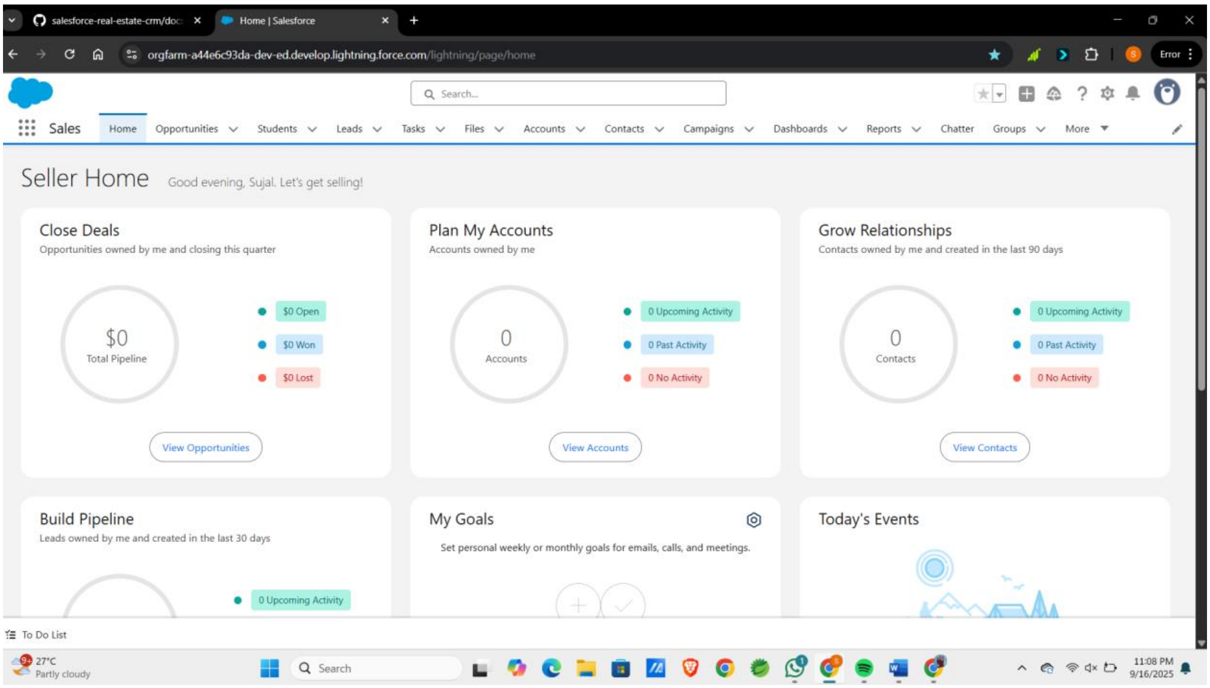
- Requirements gathered and documented
- Stakeholders identified with their needs
- Current vs Salesforce process mapped
- Real estate use cases defined
- Optional apps explored

📘 Phase 2: Org Setup & Configuration

🔹 1. Introduction

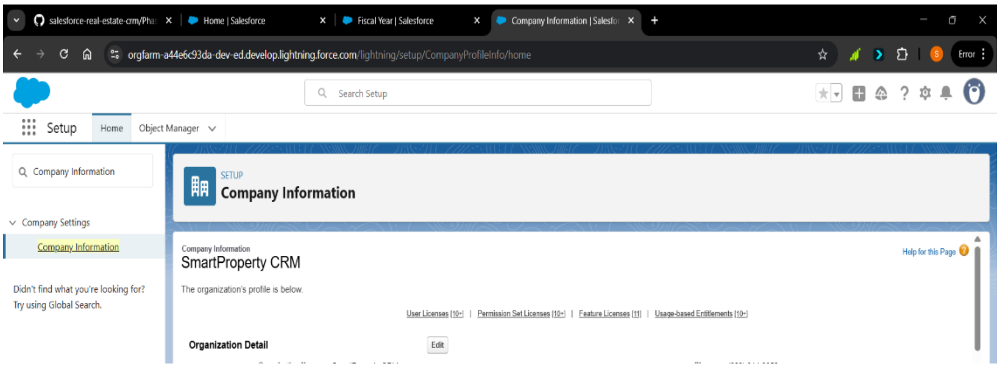
In this phase, we configure the Salesforce Developer Org to prepare the environment for building **SmartProperty CRM – Real Estate Engagement & Lead Conversion System**.
The setup ensures the org has correct company settings, security, user hierarchy, and access policies.

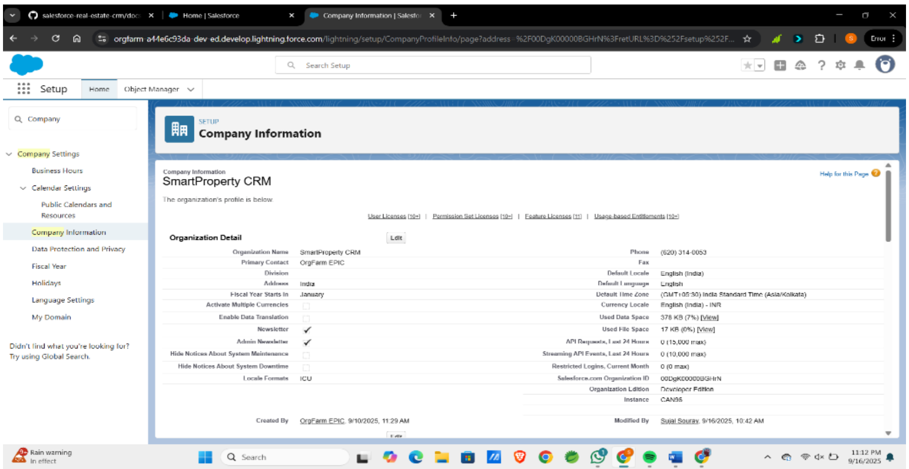
By the end of this phase, the system will be ready for **Phase 3: Data Modeling & Relationships**.



2. Salesforce Editions

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





3. Company Profile Setup

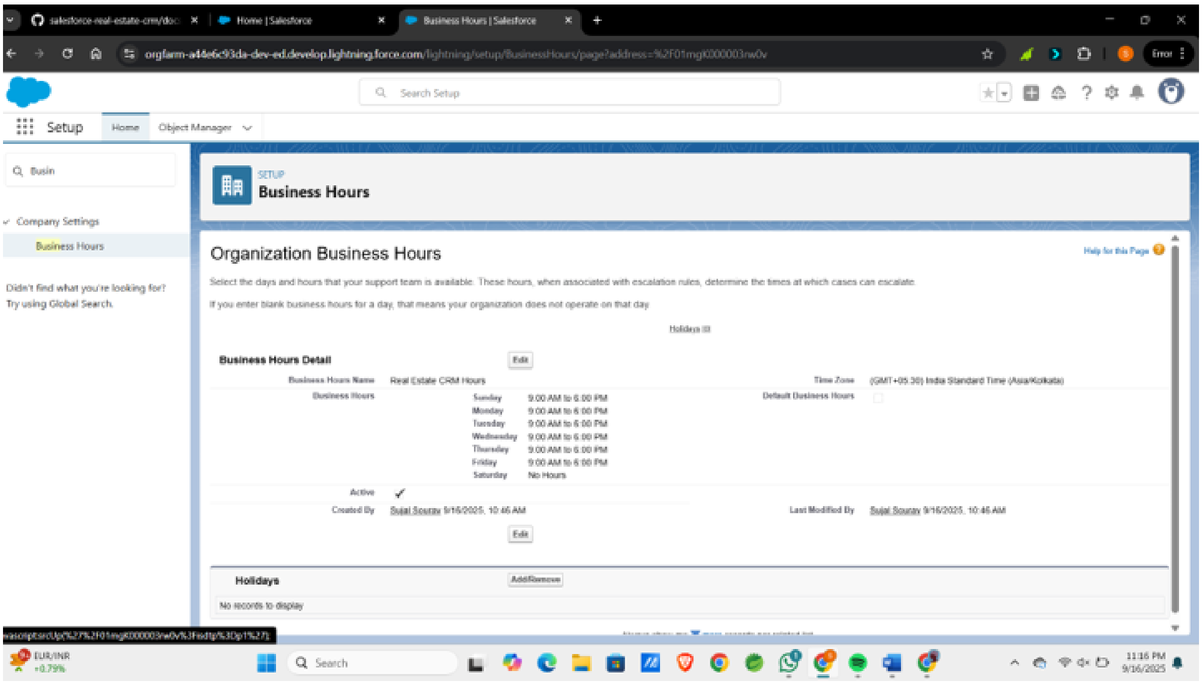
Navigation: Setup → Company Settings → Company Information

- 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

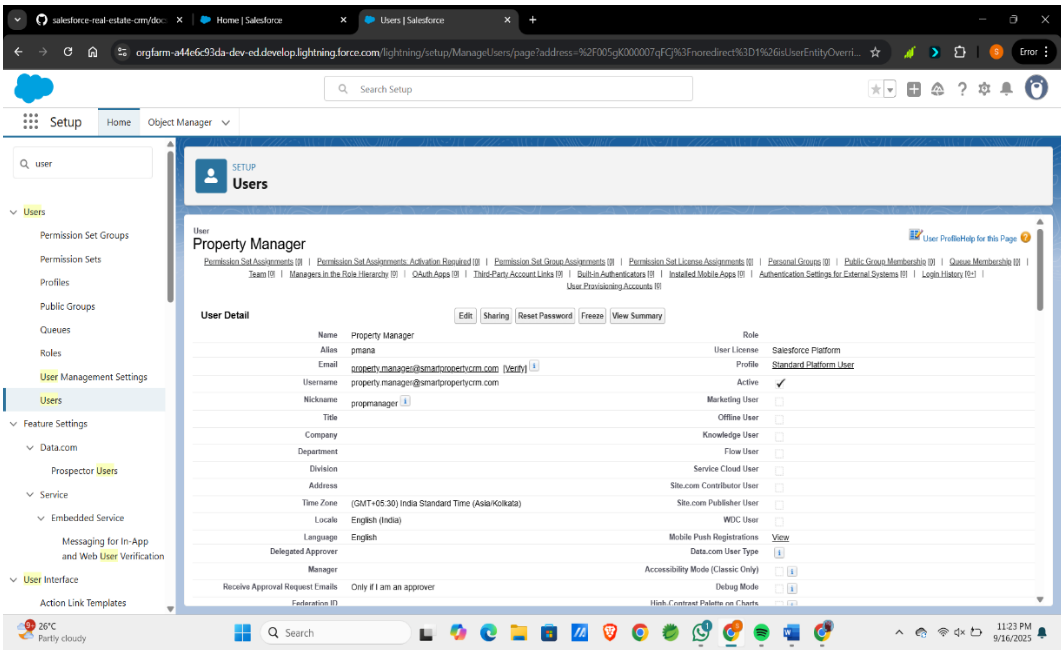
Navigation: Setup → Company Settings → Fiscal Year

- Standard Fiscal Year → April 1 to March 31

6. User Setup & Licenses

Navigation: Setup → Users → New User

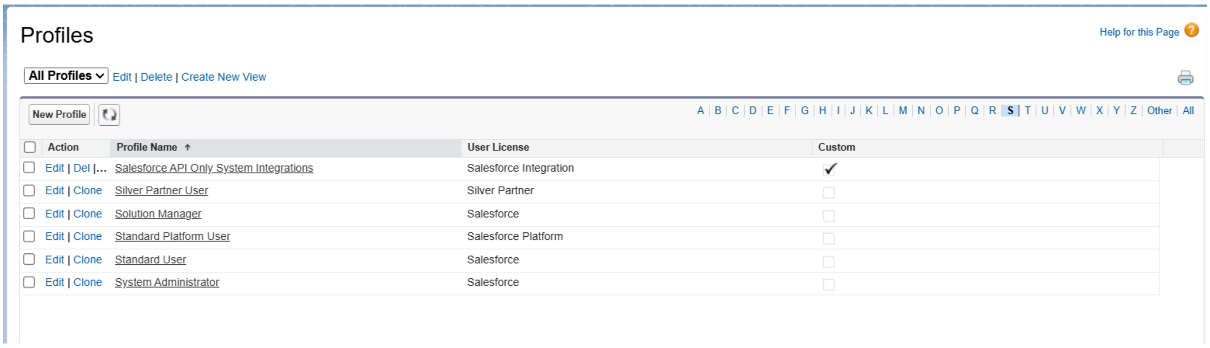
- Created sample users:
  - Sales Agent → Standard Salesforce License
  - Property Manager → Salesforce Platform License
  - Sales Manager → Standard Salesforce License



7. Profiles

Navigation: Setup → Profiles

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

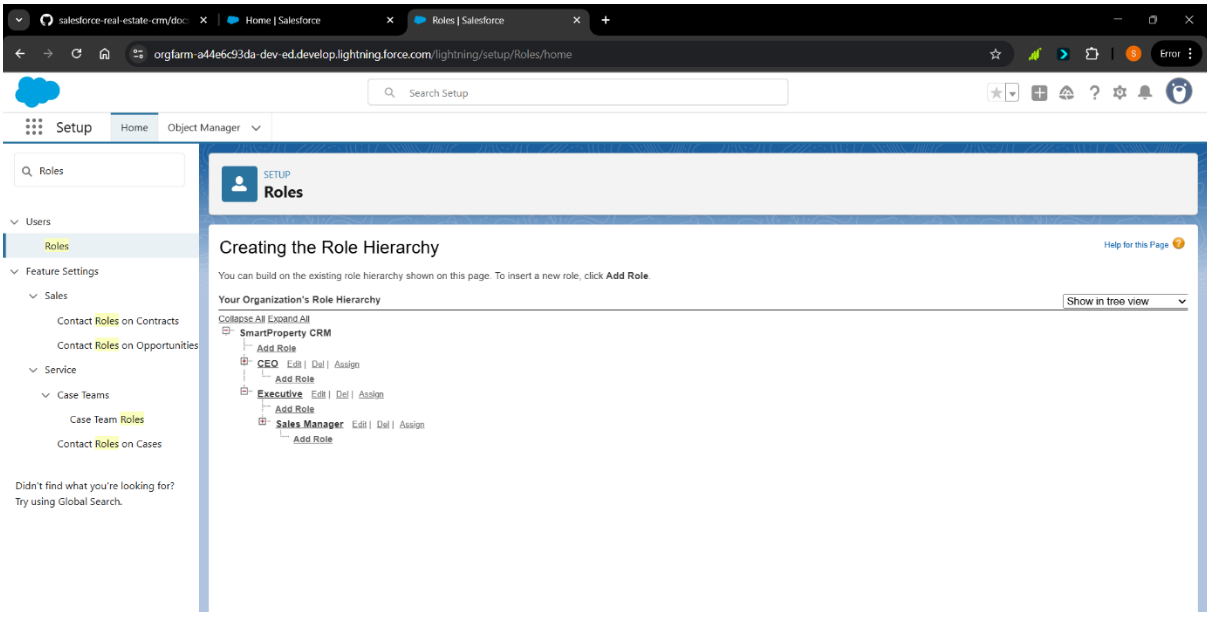


◆ 8. Roles (Hierarchy)

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

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

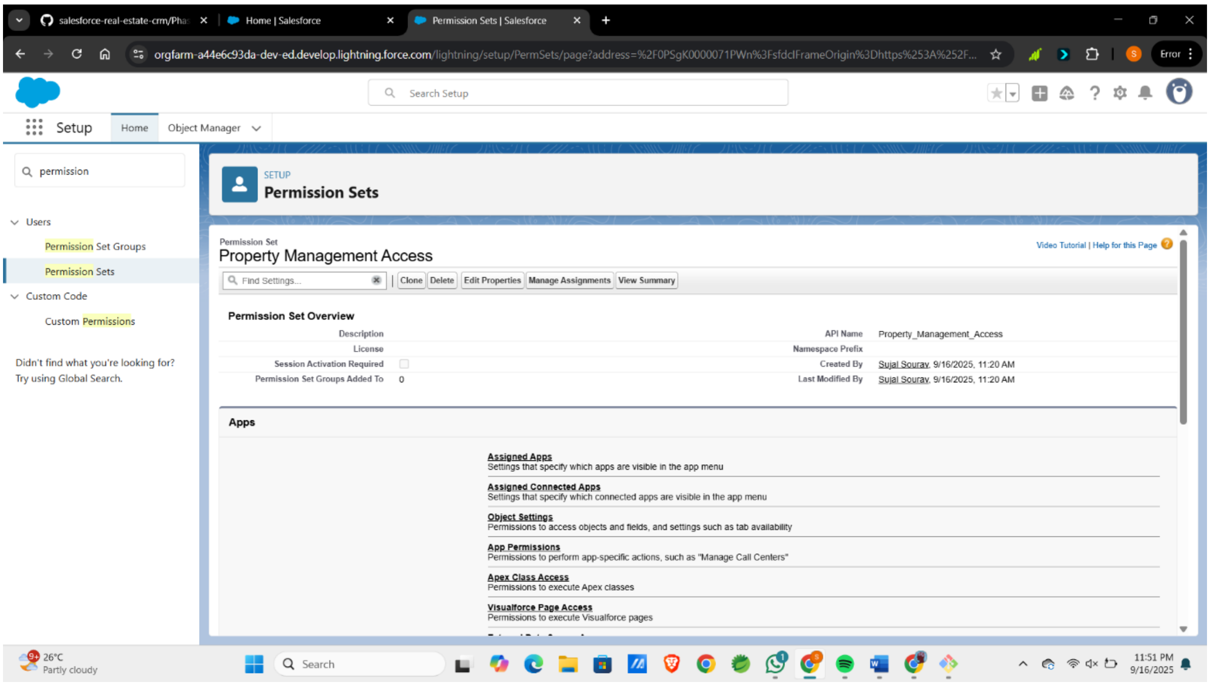
(Ensures managers can view their team's records.)



◆ 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)

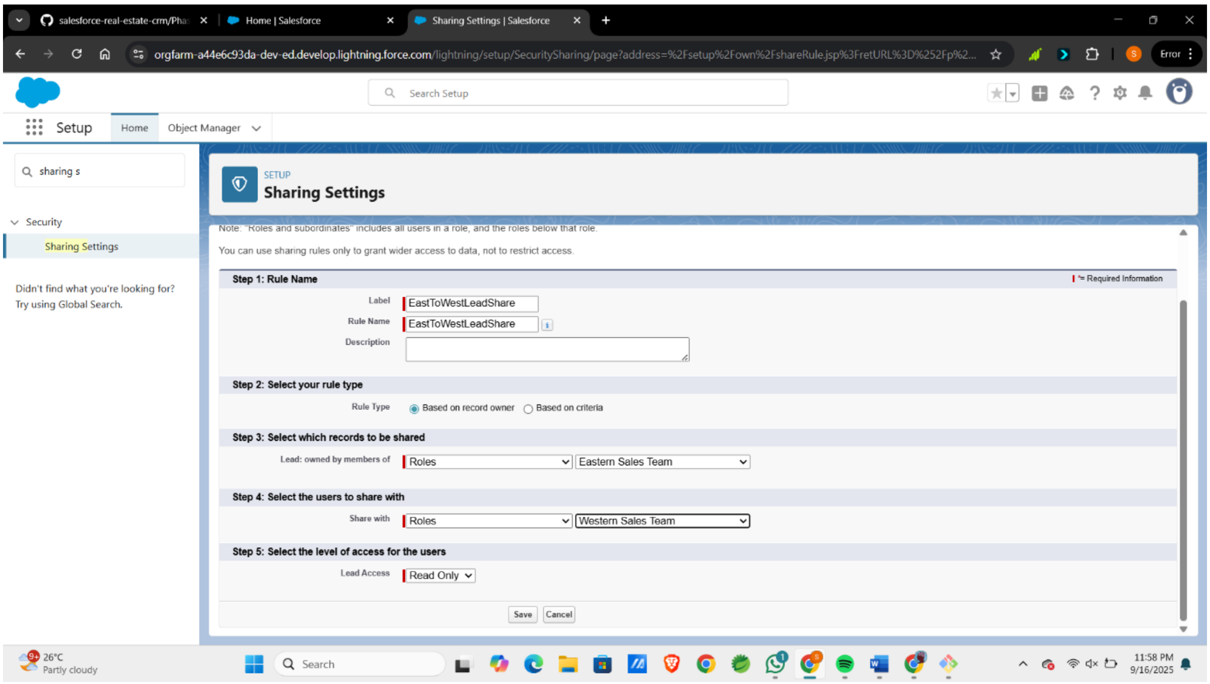
Navigation: Setup → Sharing Settings

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

🔹 11. Sharing Rules

Navigation: Setup → Sharing Settings → New Sharing Rule

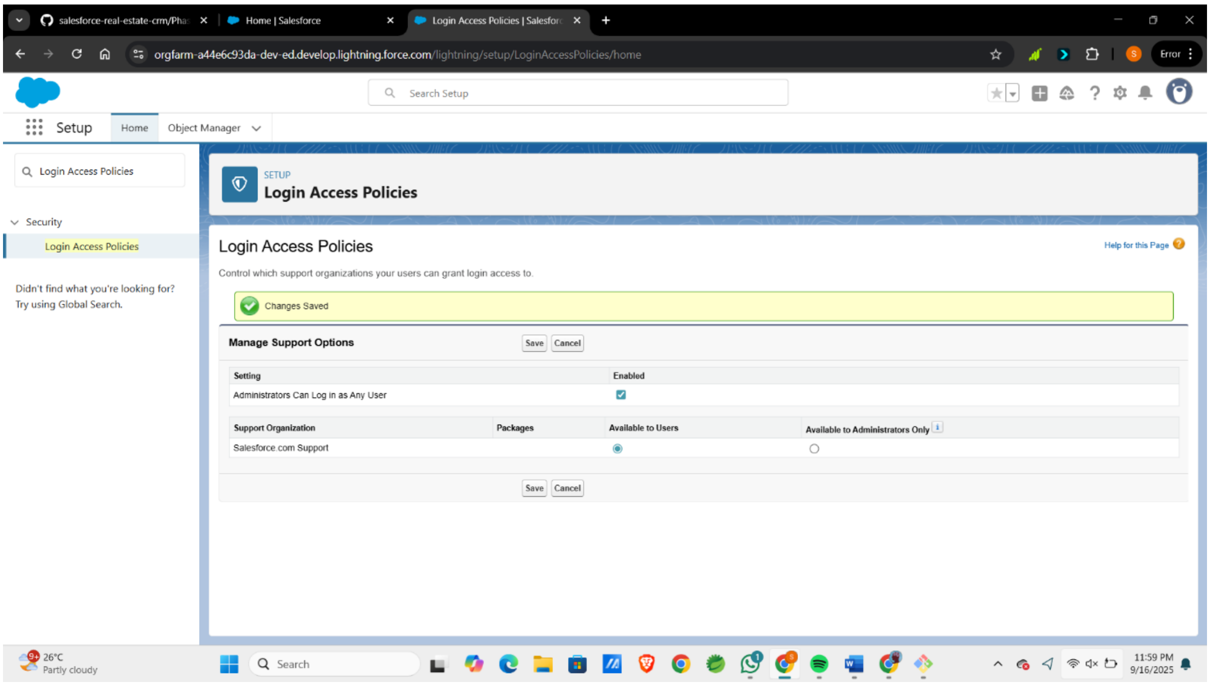
- Example: **Share Leads owned by “East Team” with West Team**

- 

- **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**

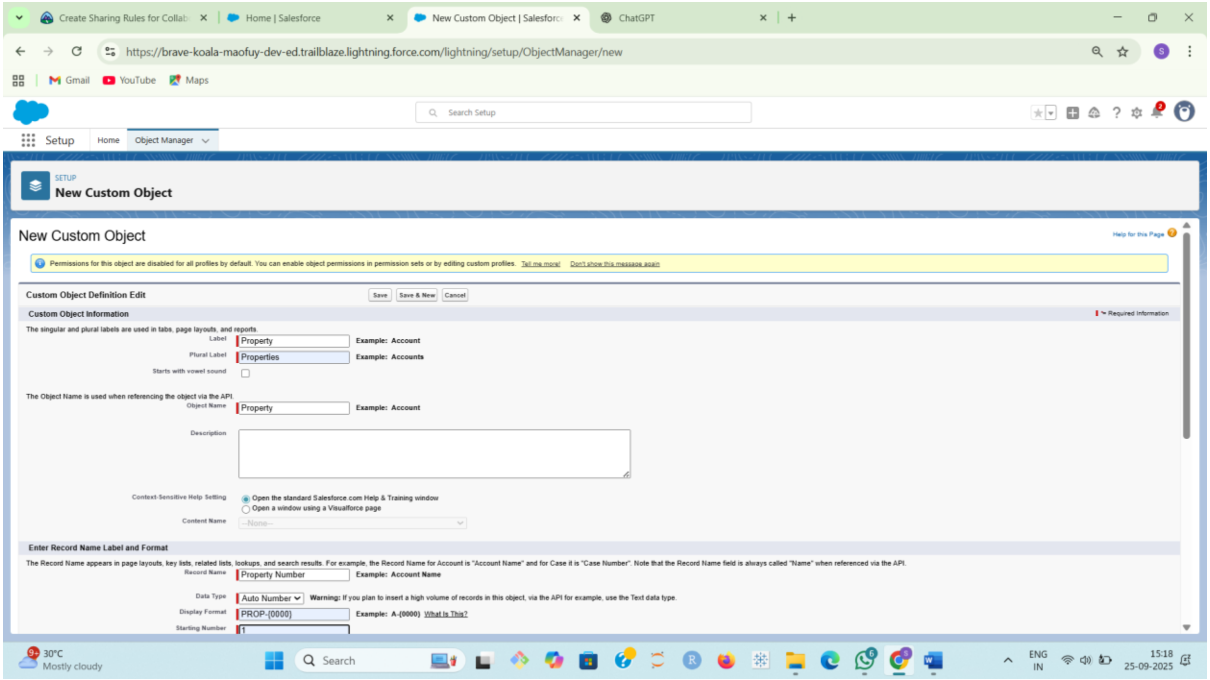
- Initial setup done directly in Dev Org
- Future deployment methods:
    - Change Sets (click-based)
    - SFDX CLI + GitHub (for advanced version control)

✅ **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.


Create Sharing Rules for Collab
Home | Salesforce
New Custom Object | Salesforce
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YouTube
Maps
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Property
Example: Account
Plural Label
Properties
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Property
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Property Number
Example: Account Name
Data Type
Auto Number
Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.
Display Format
PROP-{0000}
Example: A-{0000} What Is This?
Starting Number
1
30°C
Mostly cloudy
Search
ENG
IN
15:18
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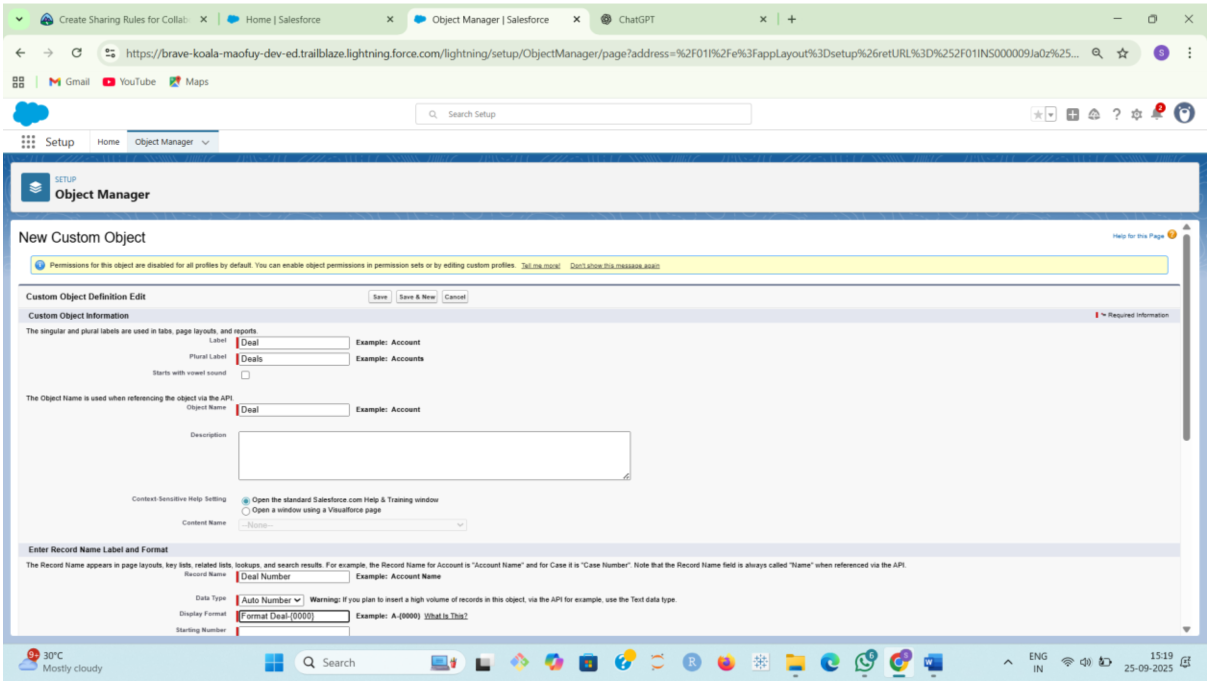
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YouTube
Maps
Search Setup
Setup
Home
Object Manager
SETUP
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New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
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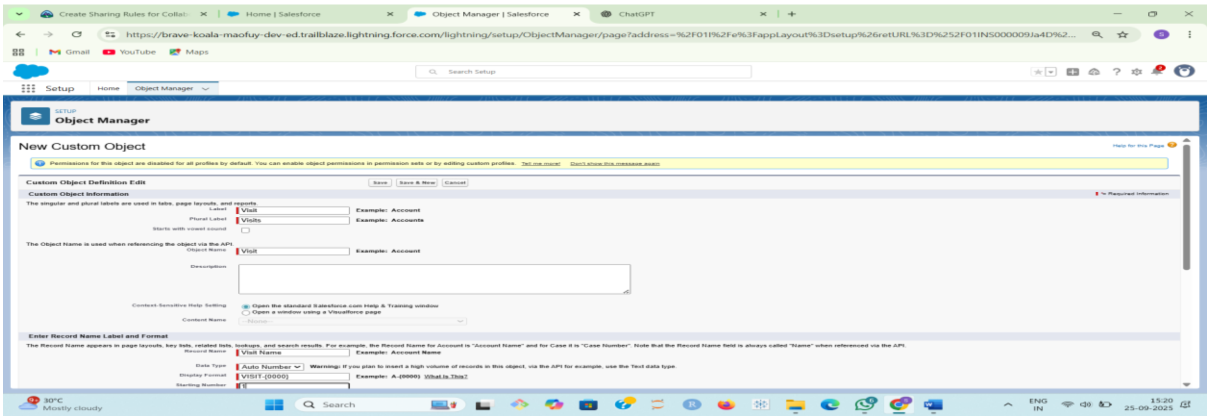
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YouTube
Maps
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Home
Object Manager
SETUP
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New Custom Object
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
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Visit
Example: Account
Plural Label
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Example: Accounts
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Example: A-{0000} What Is This?
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Search
15:20
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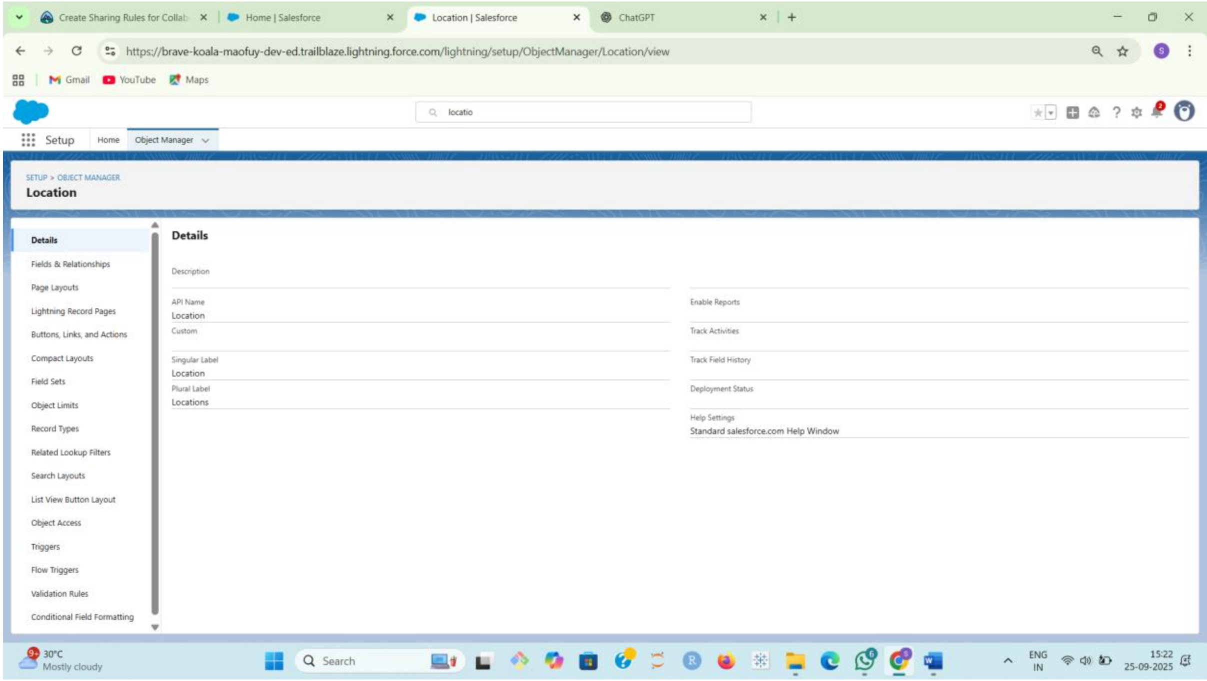
2. Fields
    - Property: Location, Price, Size (sq ft), Status (Available, Sold, Under Negotiation).
    - Visit/Appointment: Date, Time, Notes.
    - Deal: Deal Value, Closing Date, Deal Status.



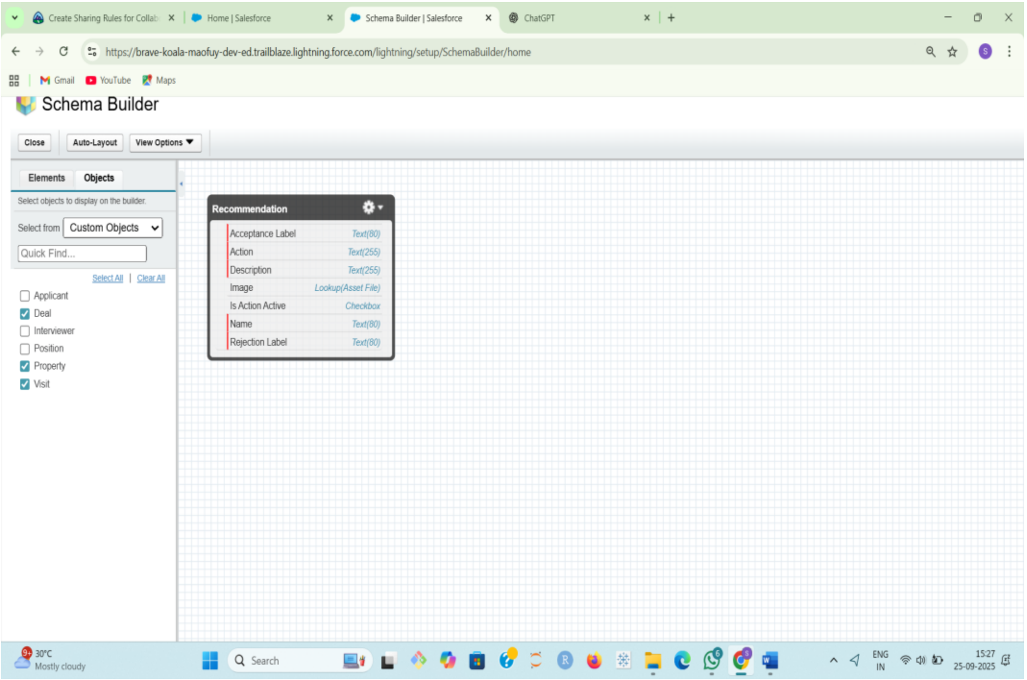
3. Record Types
    - Property: “Residential” vs “Commercial.”
    - Deal: “Rent” vs “Sale.”

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.

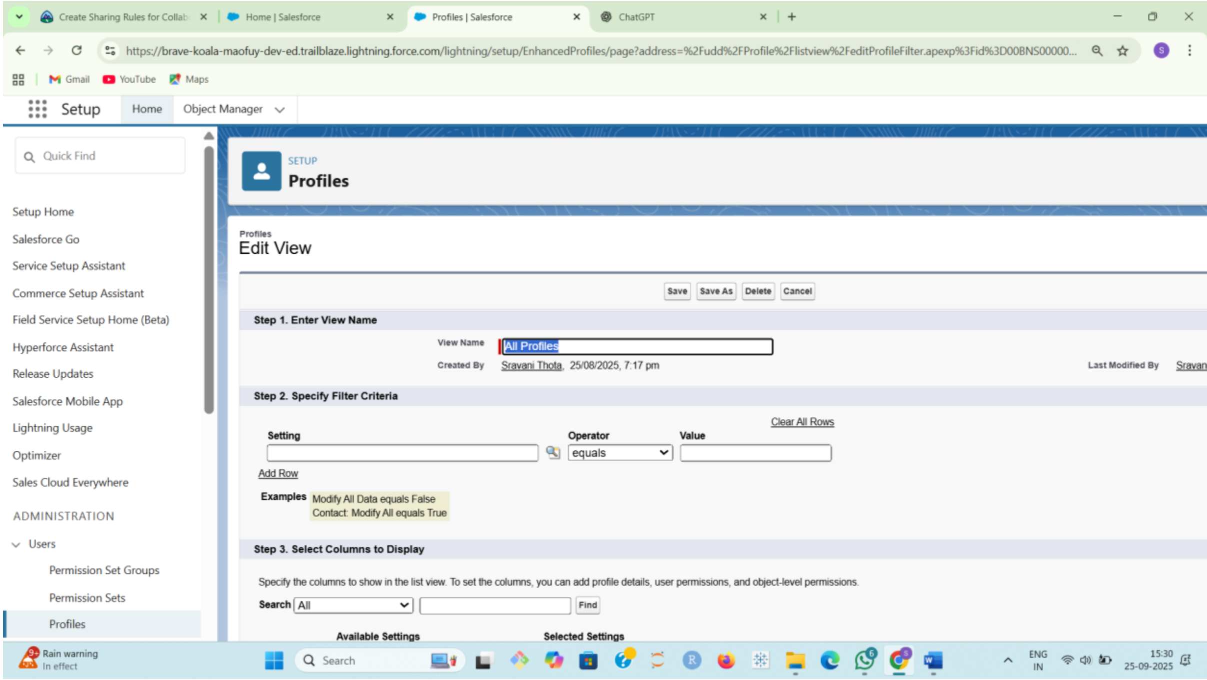
6. Schema Builder

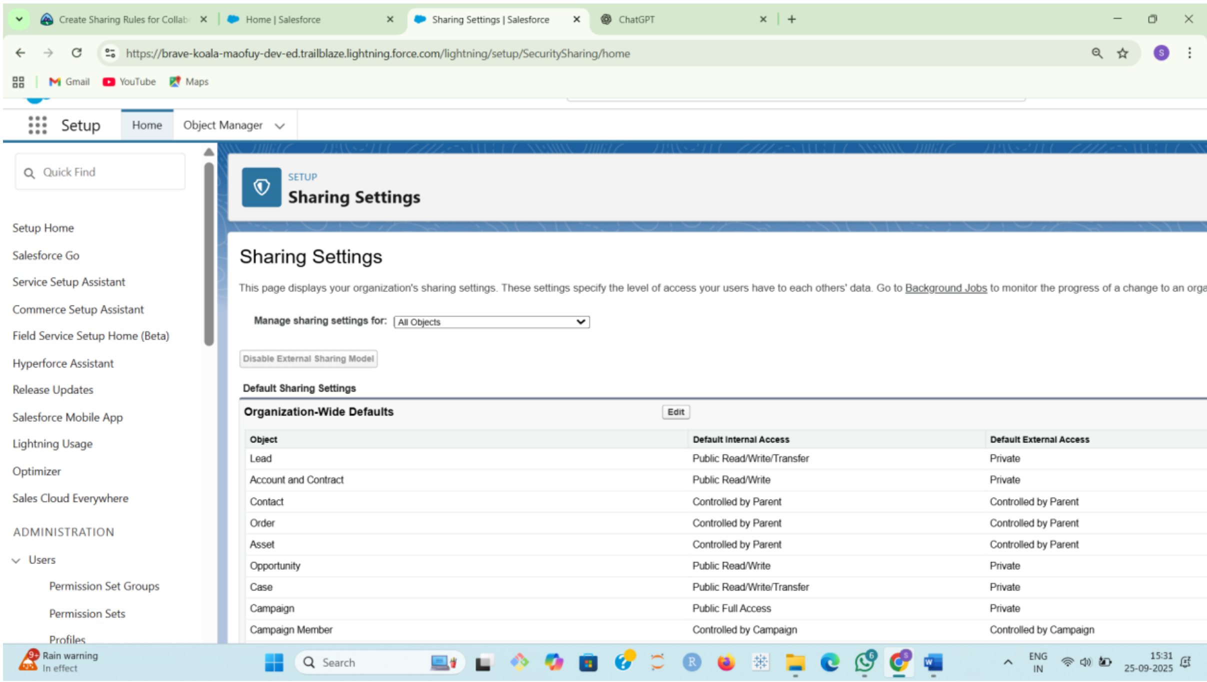
   - Used to visualize relationships among Property, Deal, Contact, Visit.



7. Lookup vs Master-Detail

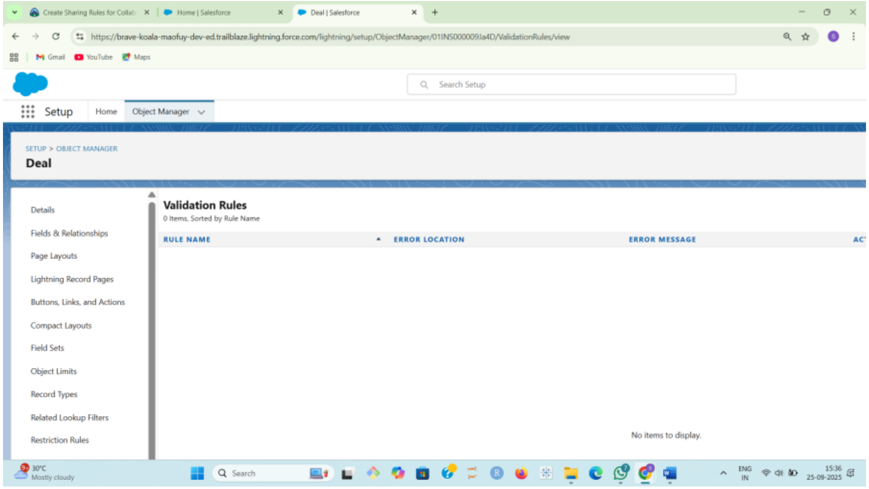
   - Property ↔ Deal → Lookup (a deal is associated with a property, but property can exist without a deal).
   - Deal ↔ Contact → Lookup (a deal links to a buyer/seller).
   - Visit ↔ Property → Lookup (a visit relates to a property, but property exists independently).

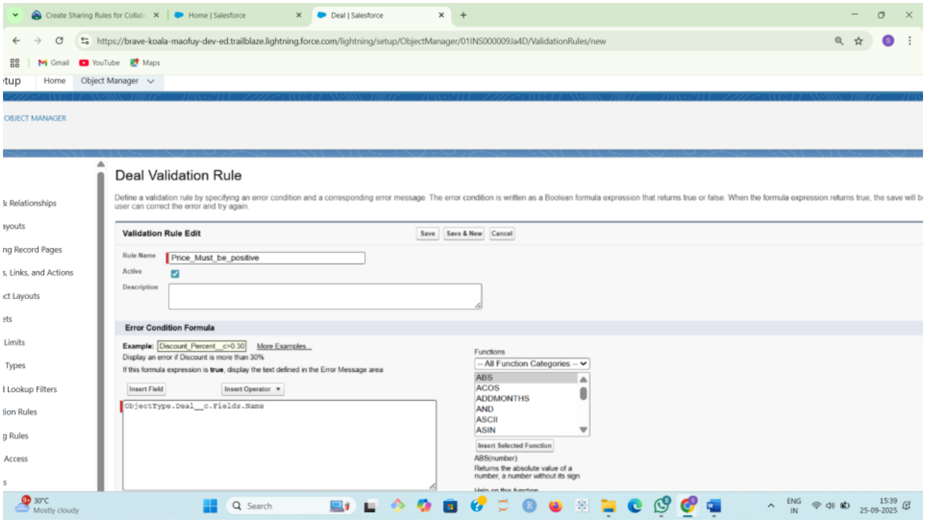




Phase 4- Implementation – Real Estate CRM Project

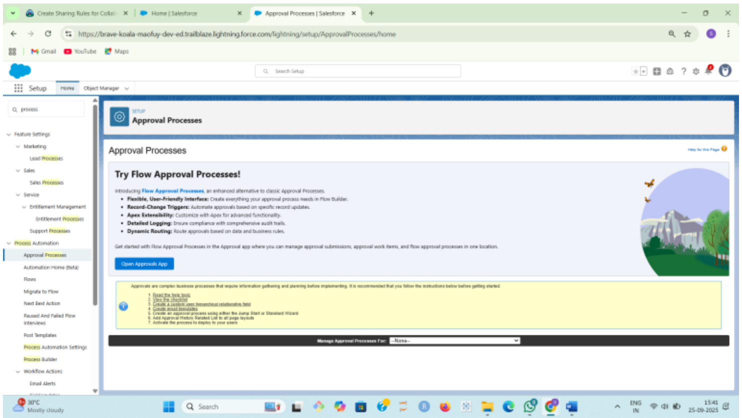
1. Validation Rules
   - Example: Property Price must be greater than 0.
   - Example: Deal Closing Date must be after Visit Date.





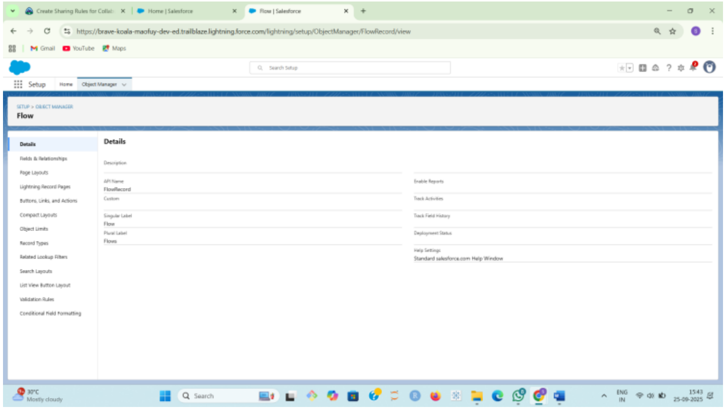
2. Approval Process

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

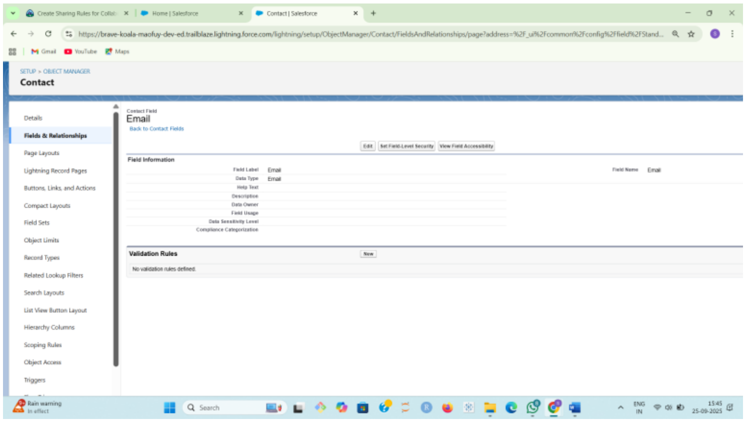


3. Flow Builder

- 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.

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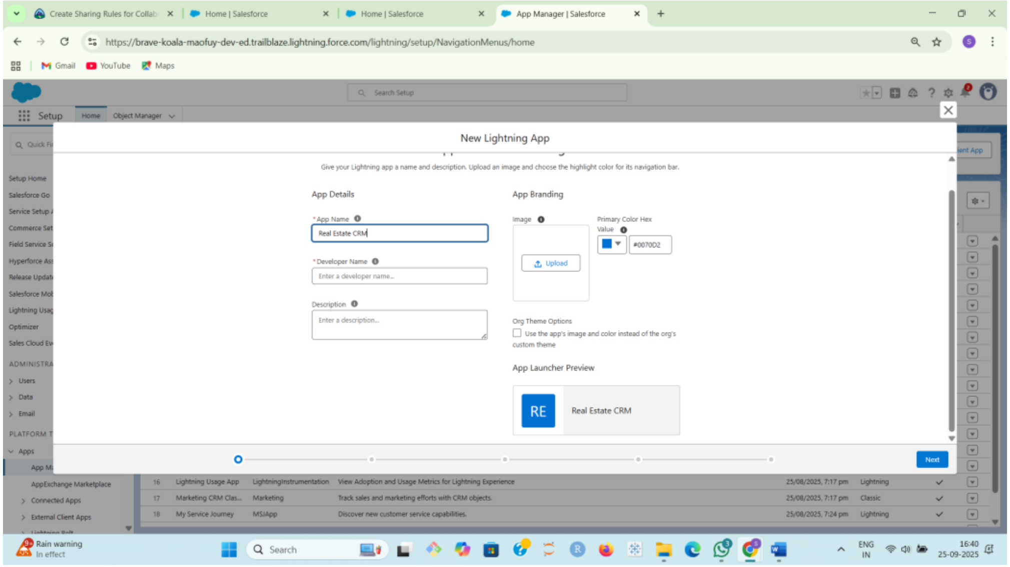
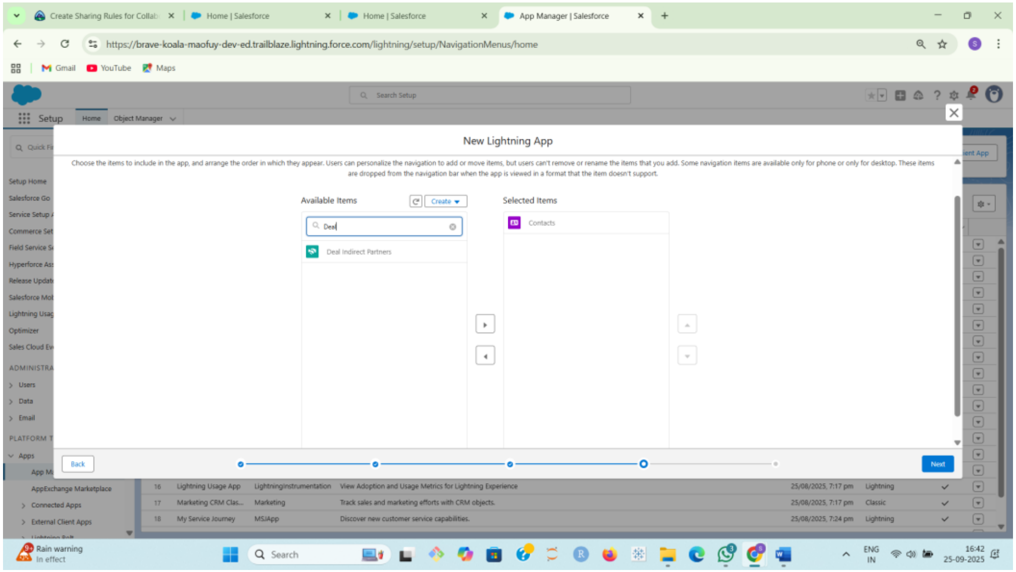
7. Custom Notifications
    - Send in-app notification to the agent when a high-value deal is approved.

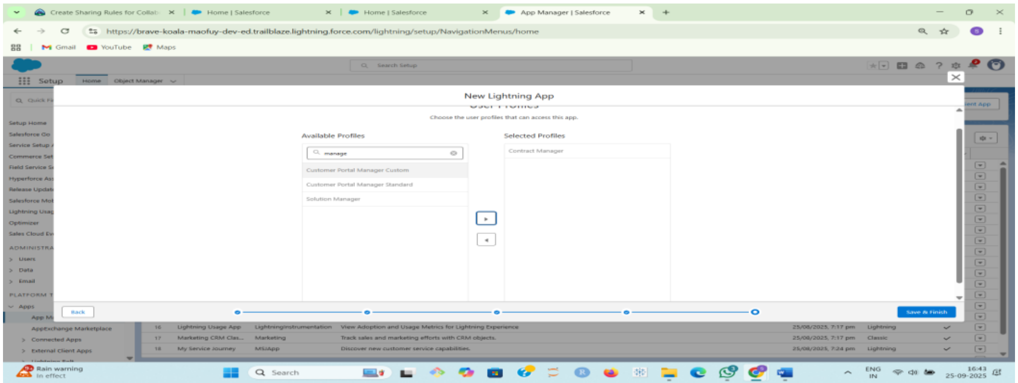
Phase 6: User Interface Development – Real Estate CRM

1.Lightning App Builder

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

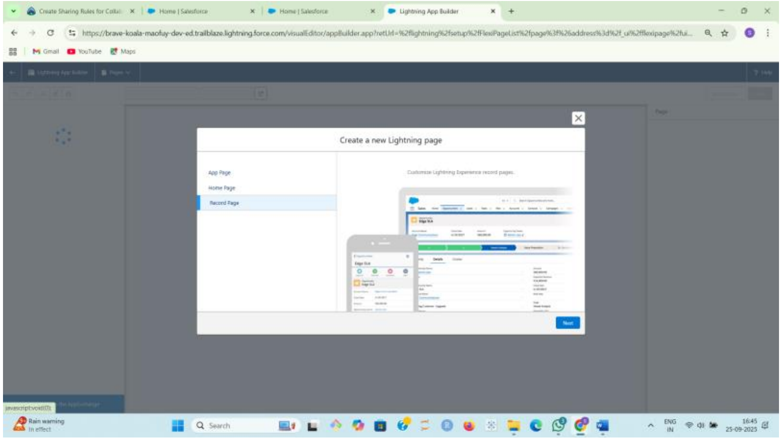


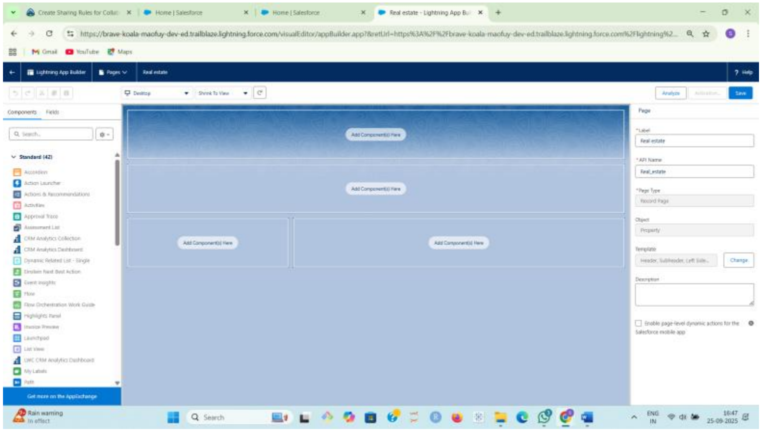




2. Record Pages

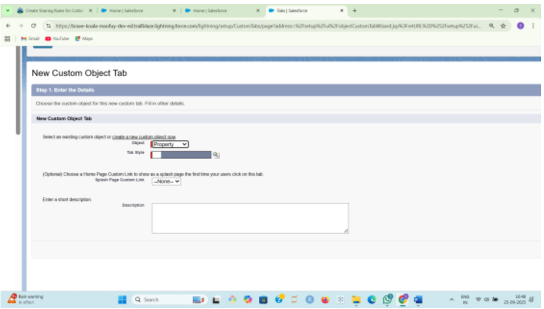
- Property Page → Display key details (location, price, availability, property type).
- Show related lists: Enquiries and Site Visits linked to the property.
- Client Page → List of enquiries, visits, and deals related to the client.





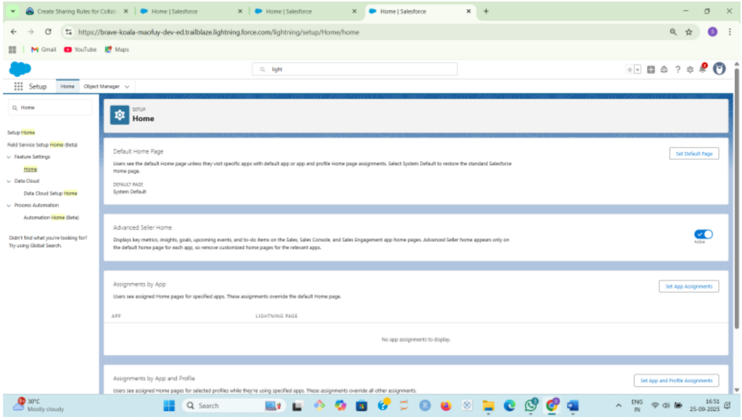
3. Tabs

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



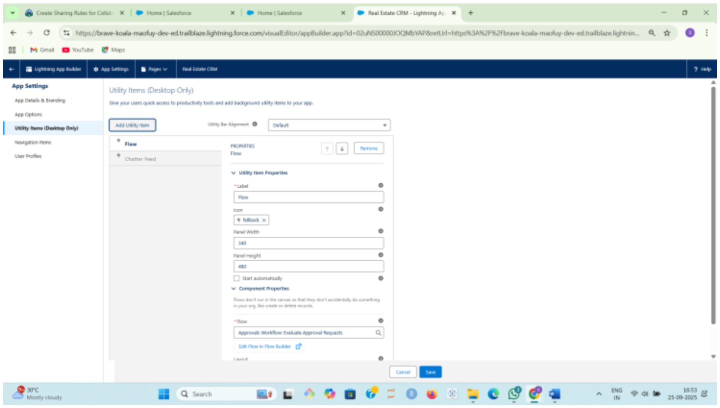
4. Home Page Layouts

- 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.

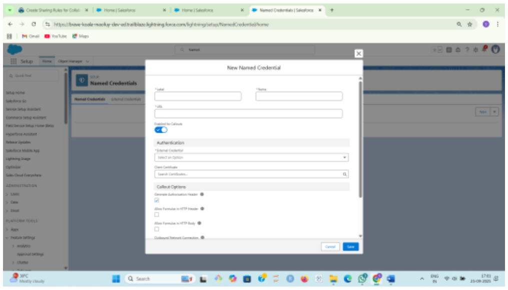
11. Navigation Service

- 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

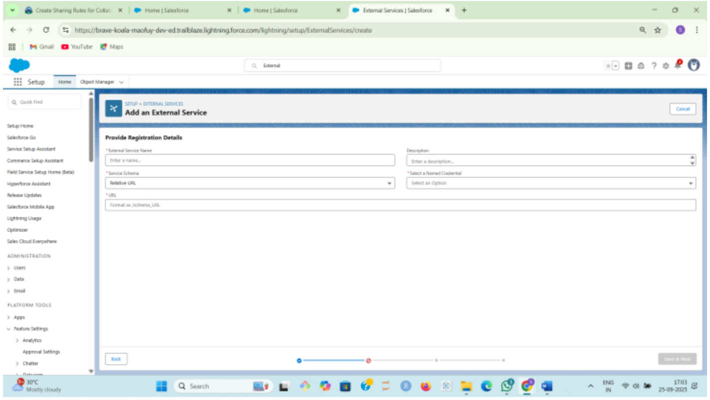
1. Named Credentials

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



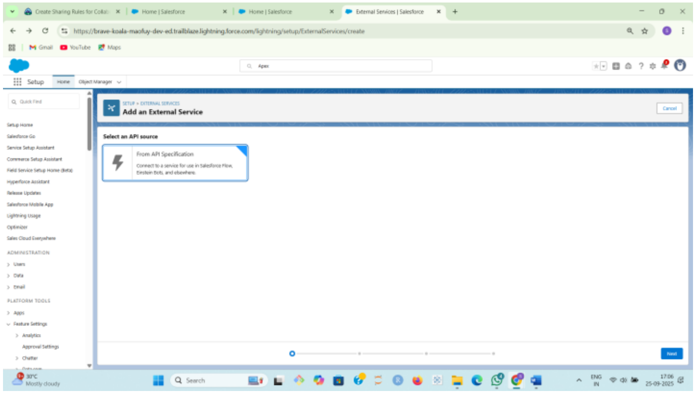
2. External Services

- 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.

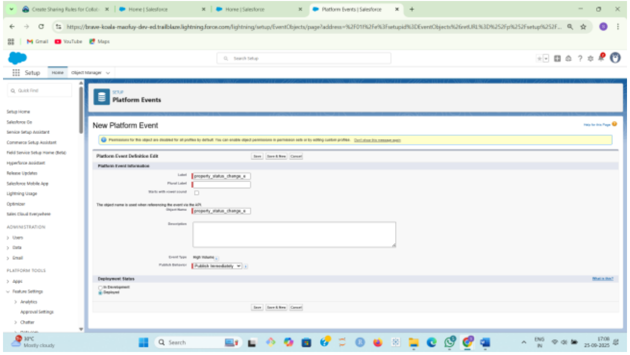


4. Callouts

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

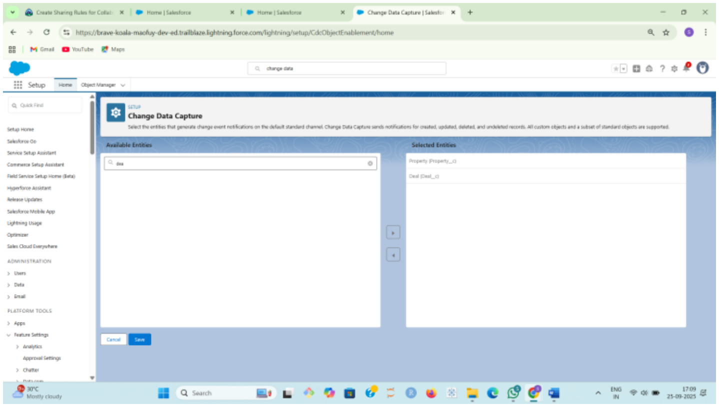
5. Platform Events

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



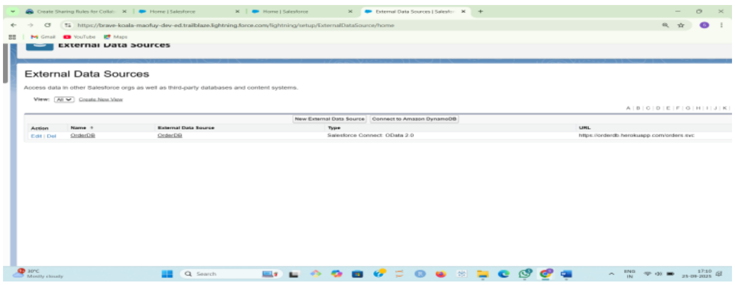
6. Change Data Capture (CDC)

- 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.



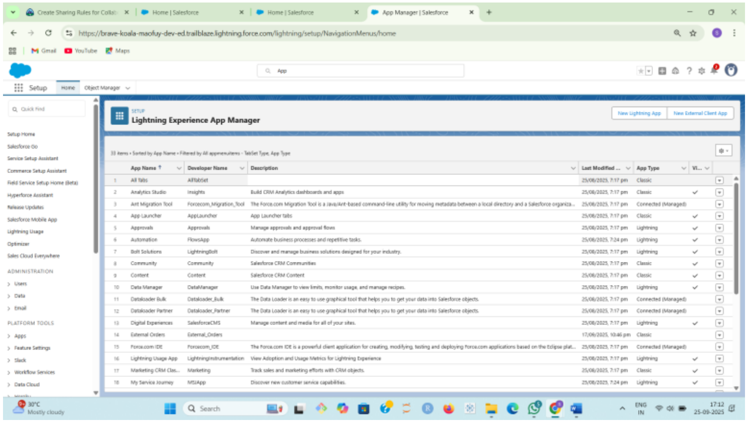
8. API Limits

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

- Government verification systems

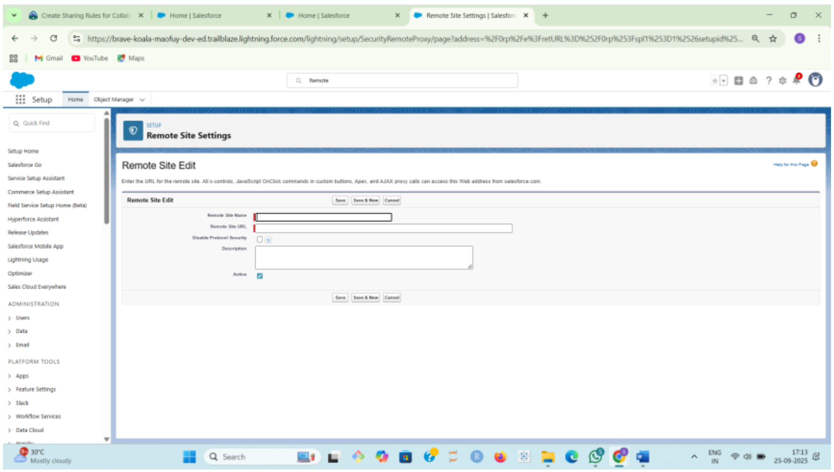
9. OAuth & Authentication

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



10. Remote Site Settings

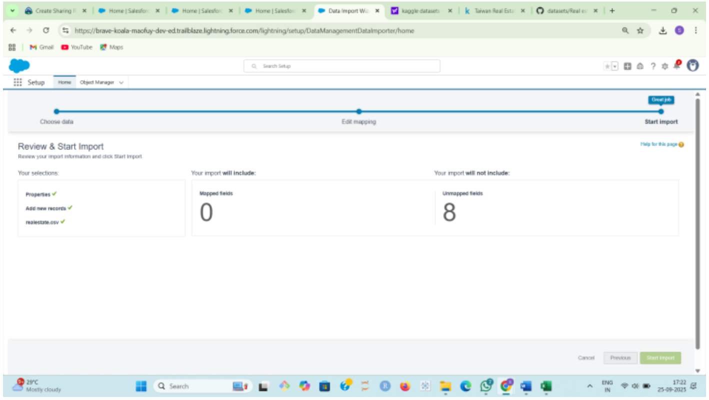
- Allow callouts to:
  - External listing portals
  - Government property verification domains
  - Bank/Mortgage APIs



Phase 8: Data Management & Deployment – Real Estate CRM

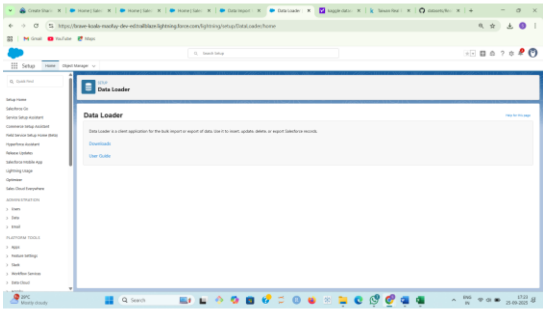
1. Data Import Wizard

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



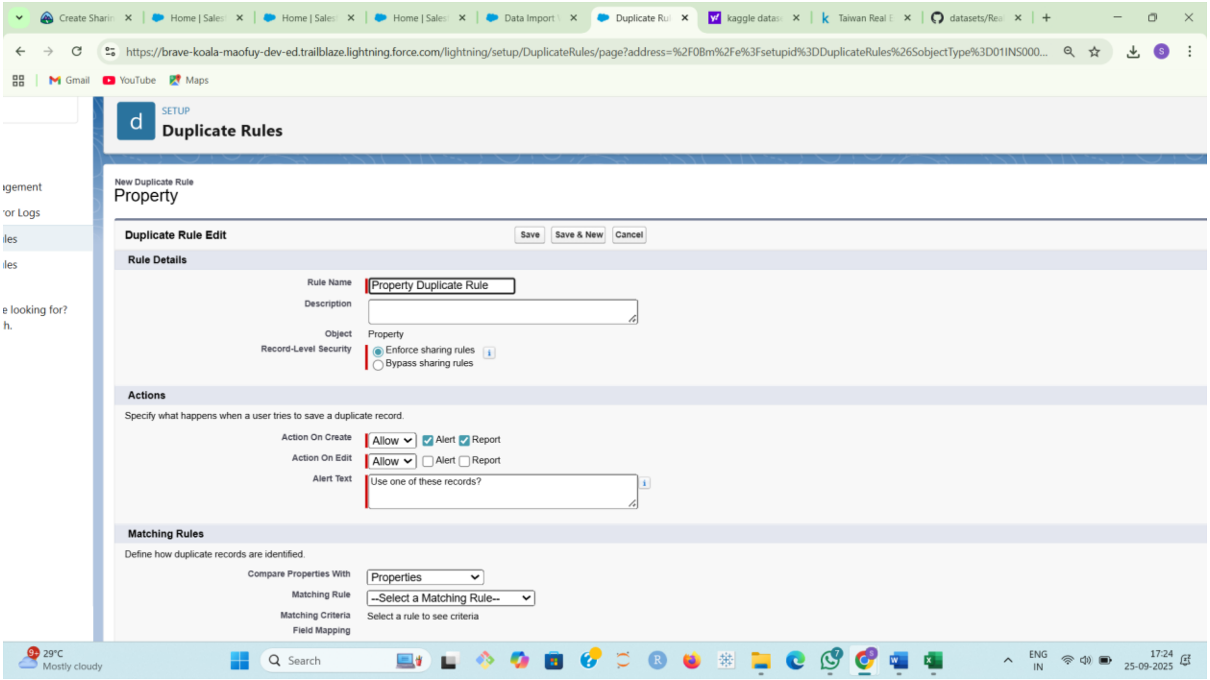
2. Data Loader

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



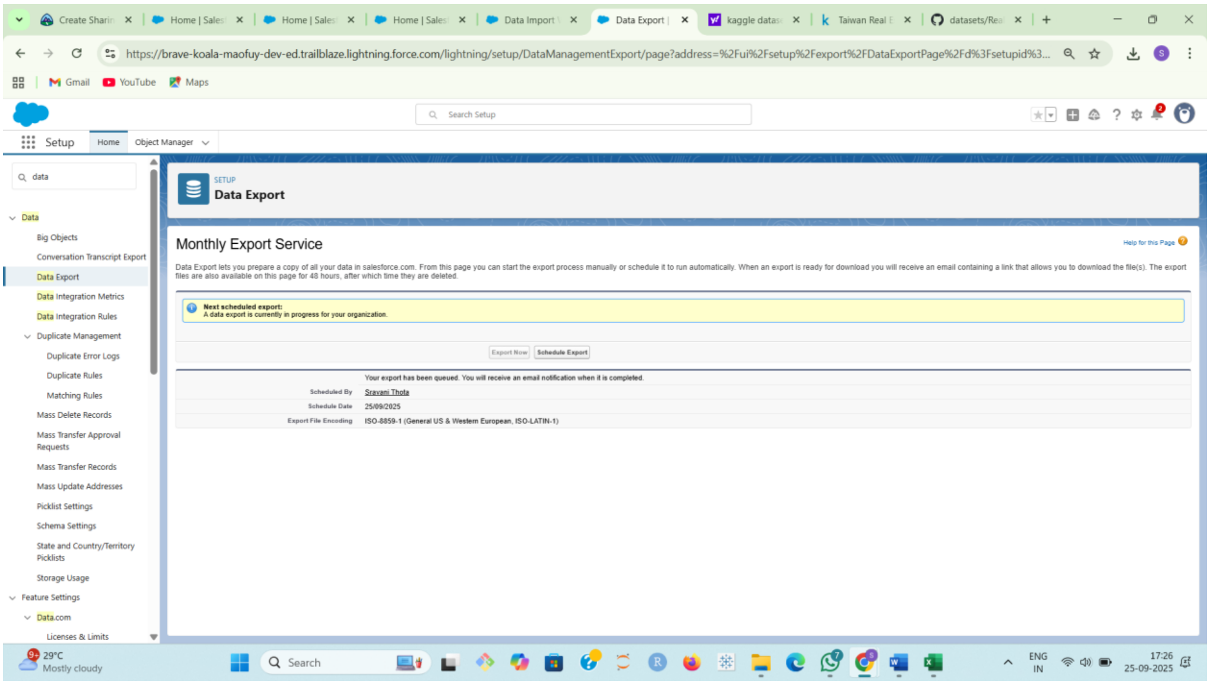
3. Duplicate Rules

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



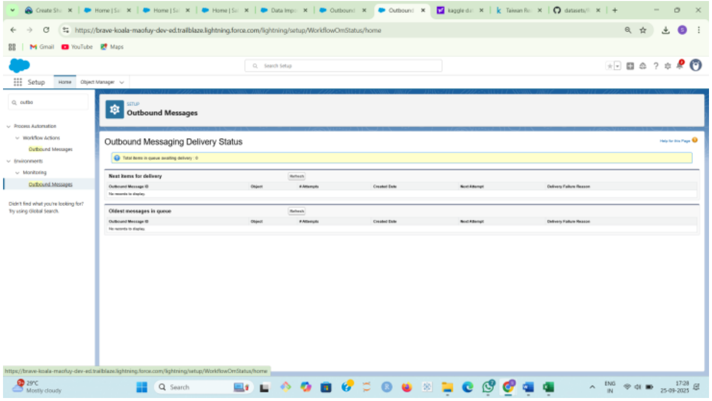
4. Data Export & Backup

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



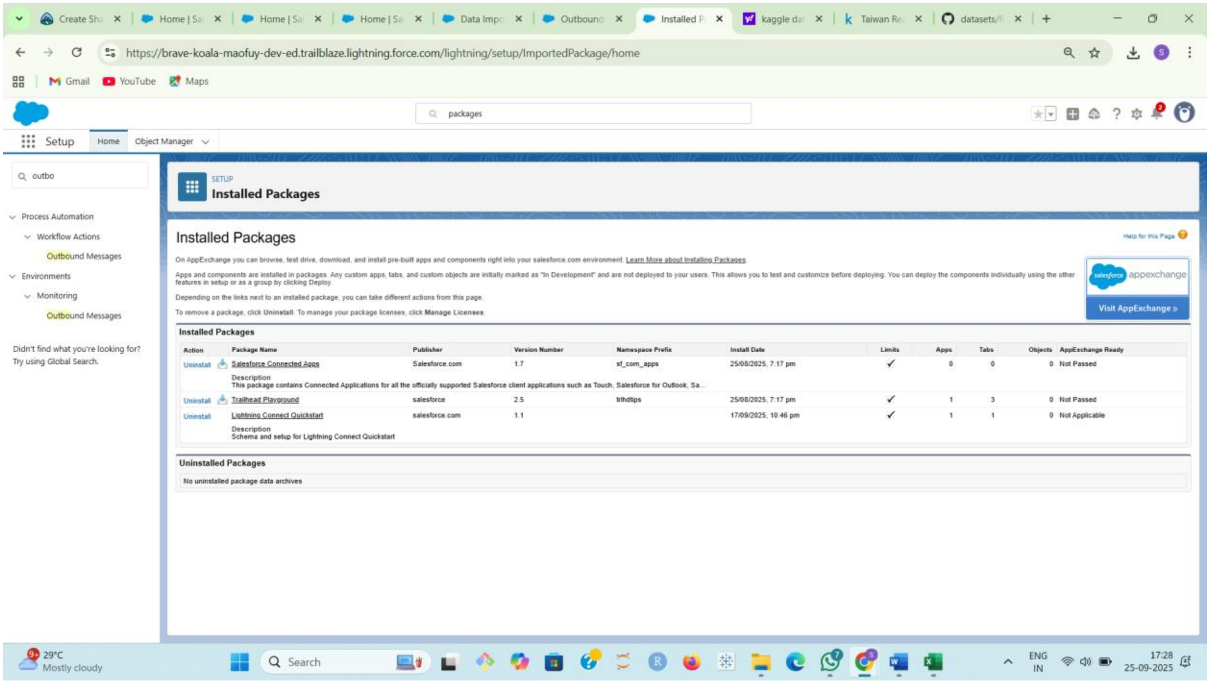
5. Change Sets

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



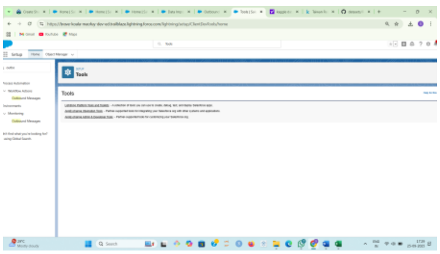
6. Unmanaged vs Managed Packages

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



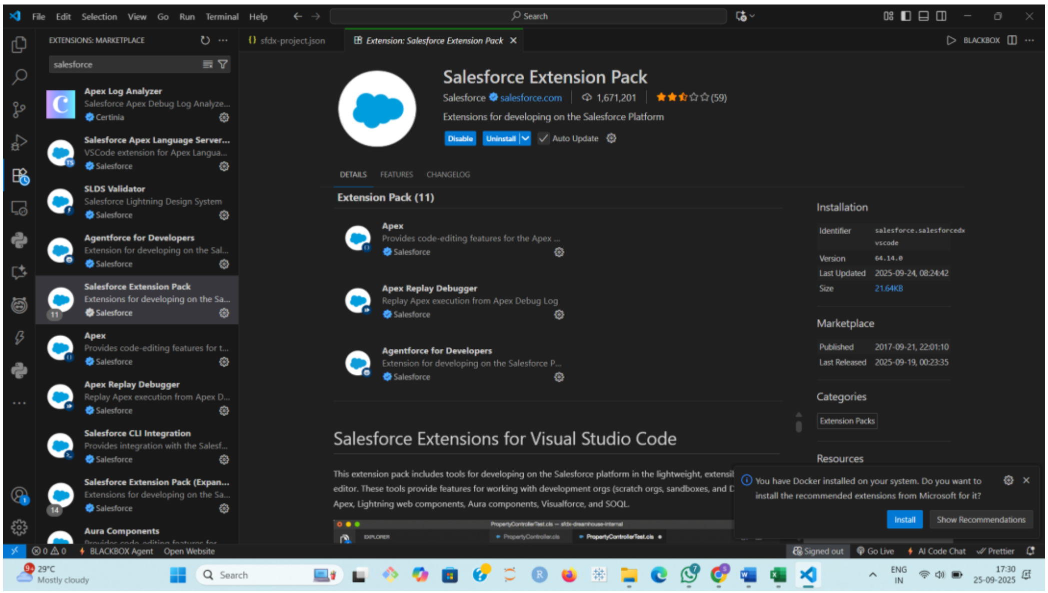
7. ANT Migration Tool

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



8. VS Code & SFDX

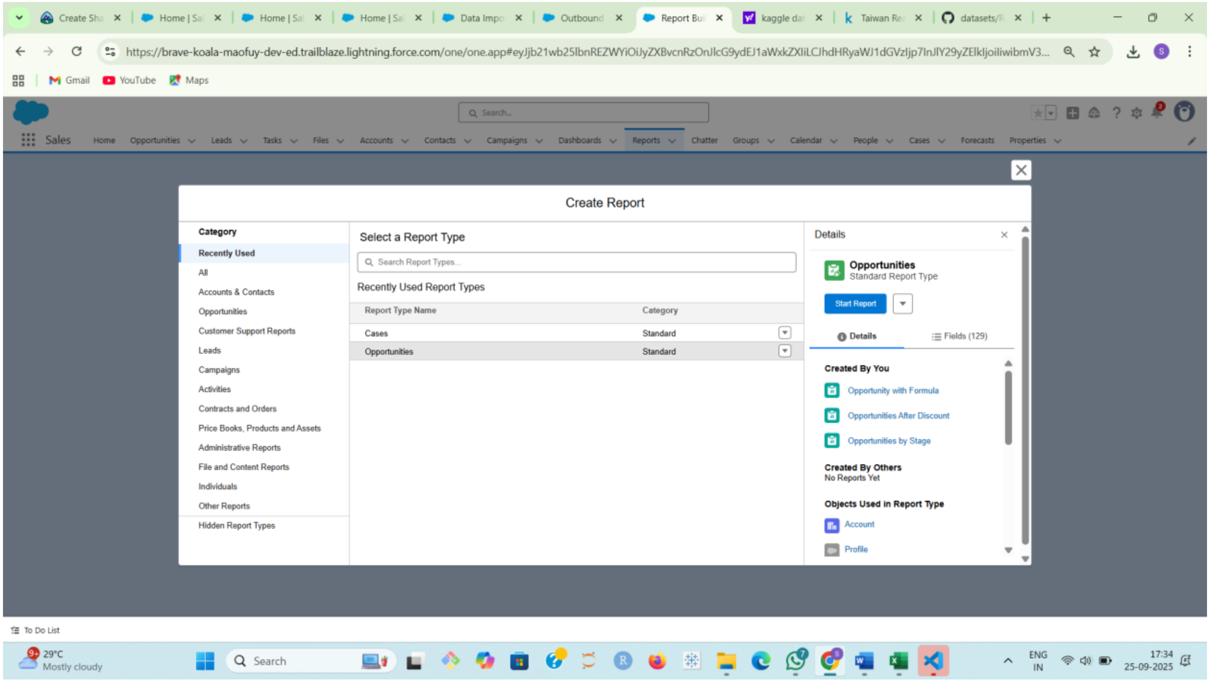
- Enable developer-friendly deployments with version control (Git) and automated scripts for continuous integration & delivery (CI/CD).



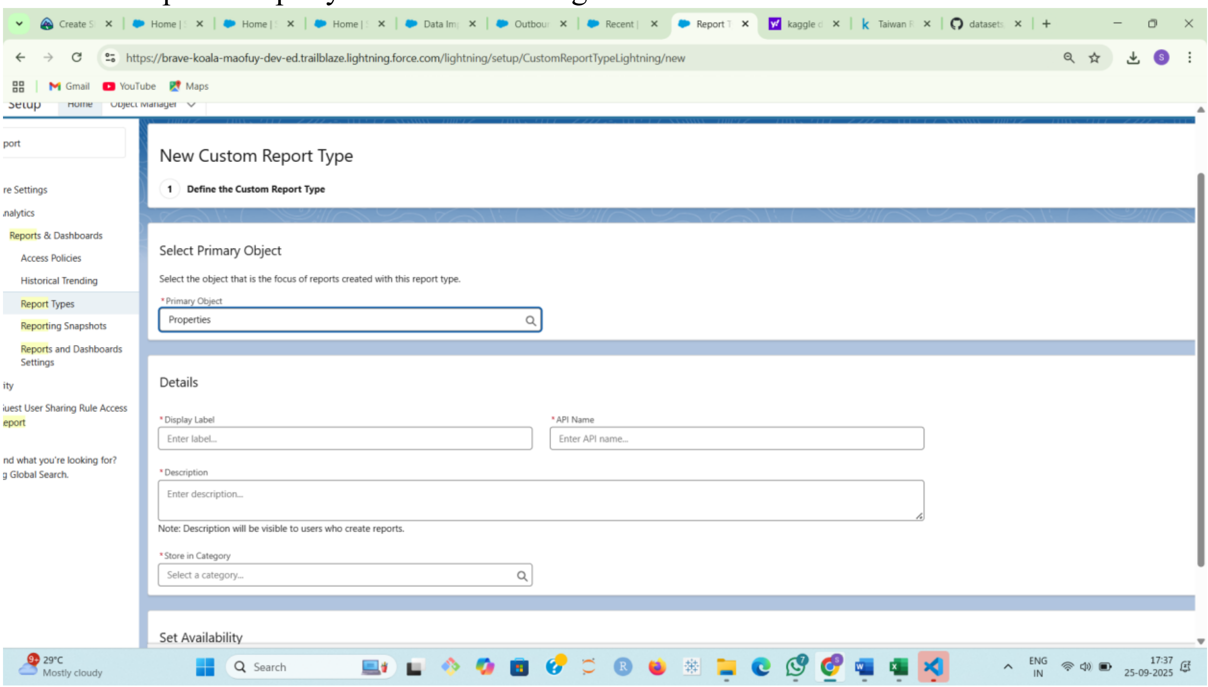
Phase 9: Reporting, Dashboards & Security Review

1. Reports

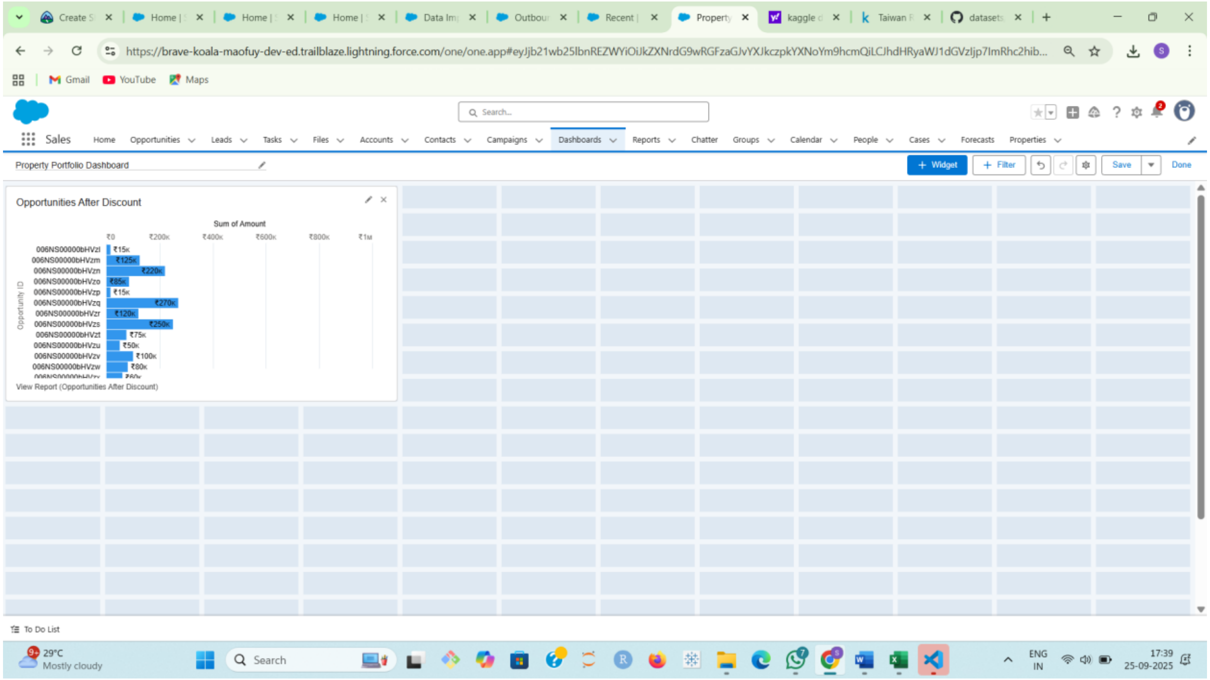
○ Property Listings by Status (Available, Sold, Rented).
○ Revenue by Property Type (Residential, Commercial).
○ Lead Conversion Report (Leads → Deals).
○ Agent Performance (Deals Closed, Visits Completed).



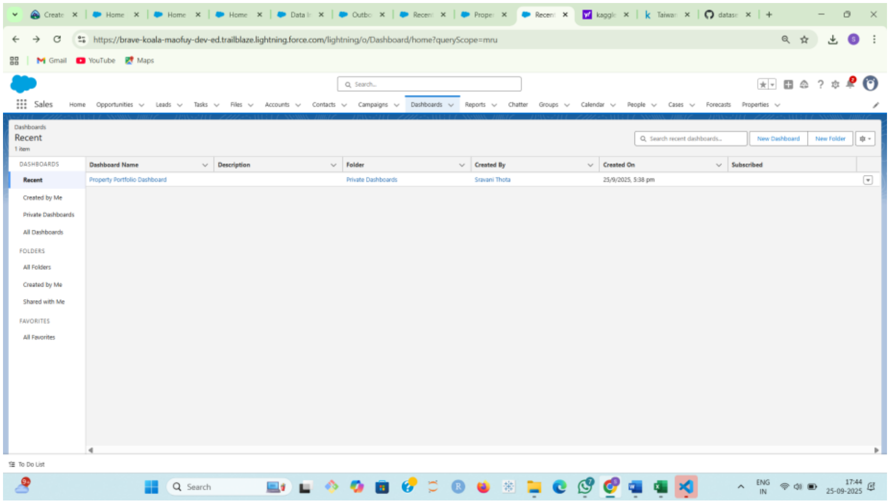
2. Report Types
   ○ Custom report: Property + Visit Scheduling + Deals.



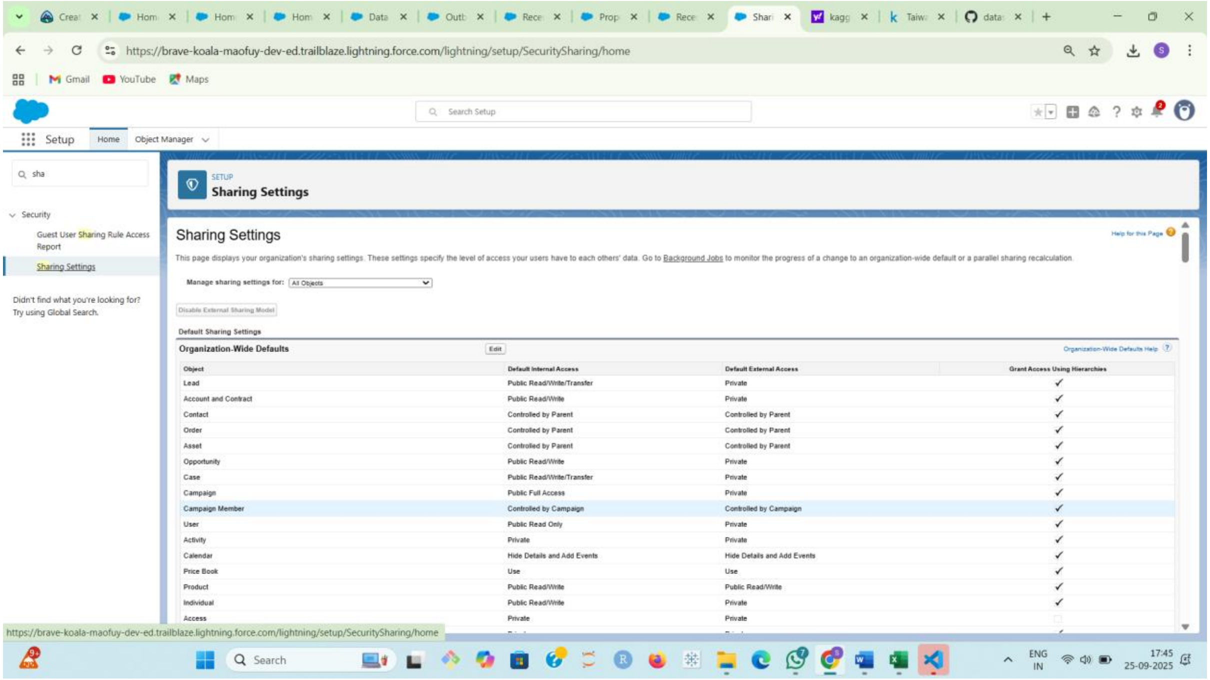
3. Dashboards
    ○ Property Portfolio Dashboard.
    ○ Sales & Revenue Dashboard.
    ○ Agent Performance Dashboard.



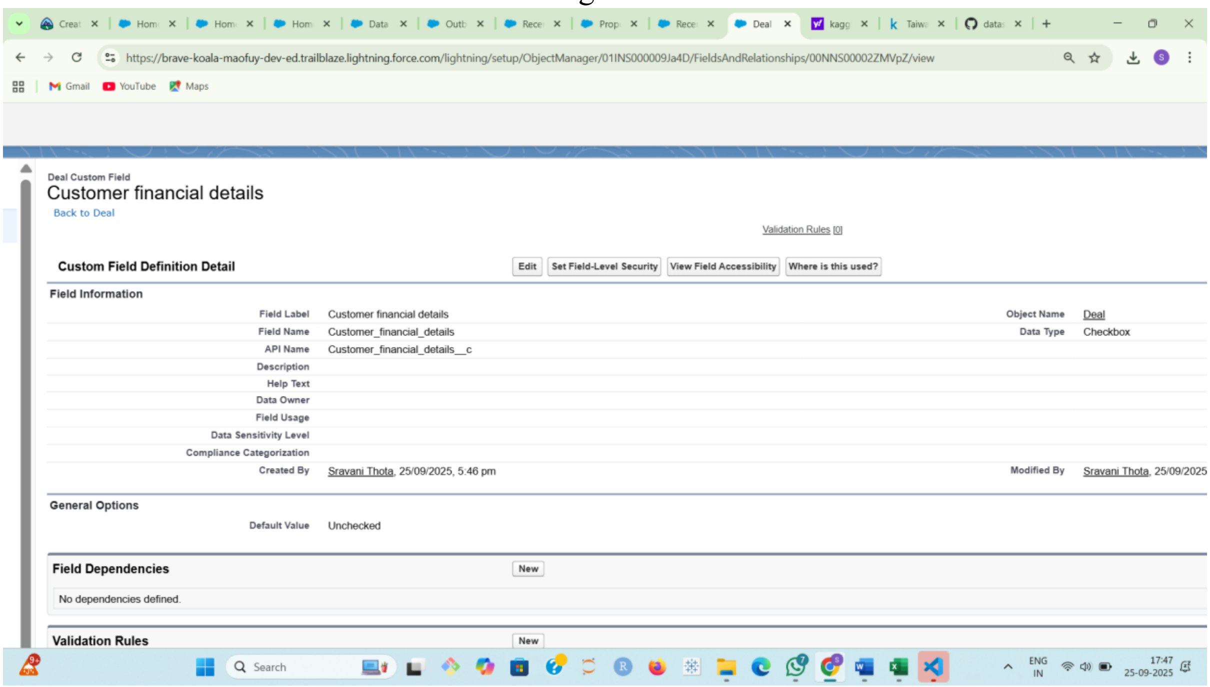
4.Dynamic Dashboards
○ Each Agent sees only their leads, visits, and deals.



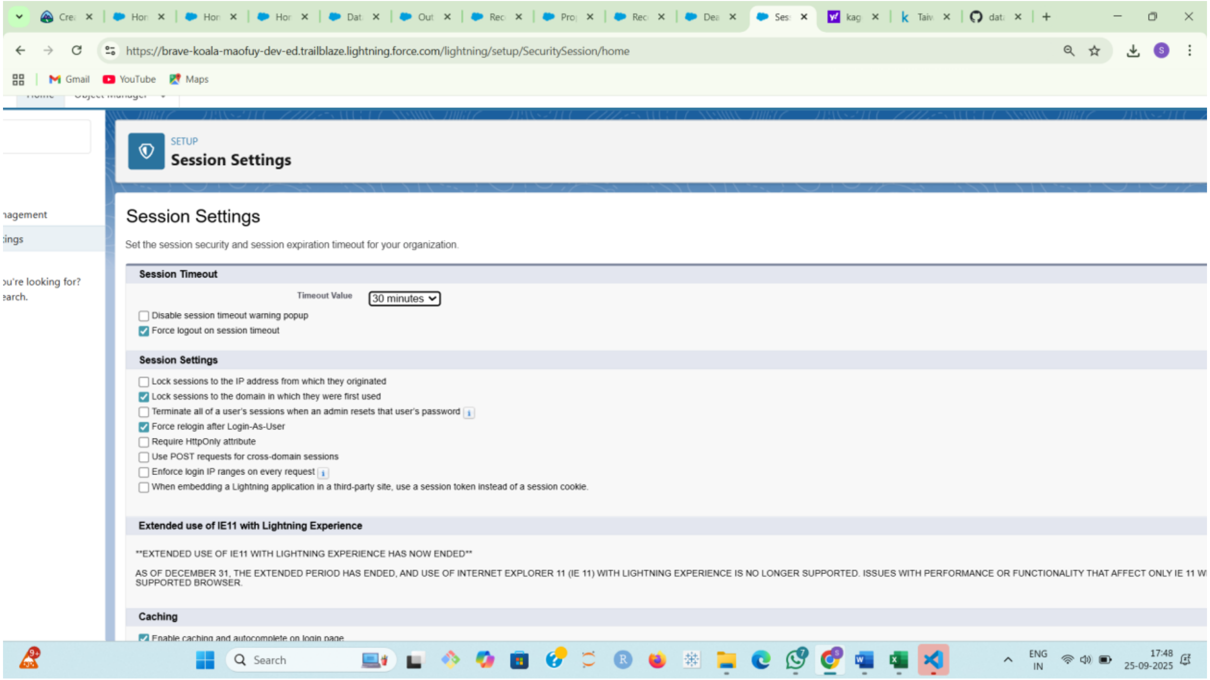
4. Sharing Settings
    ○ Leads & Deals private, Properties public.



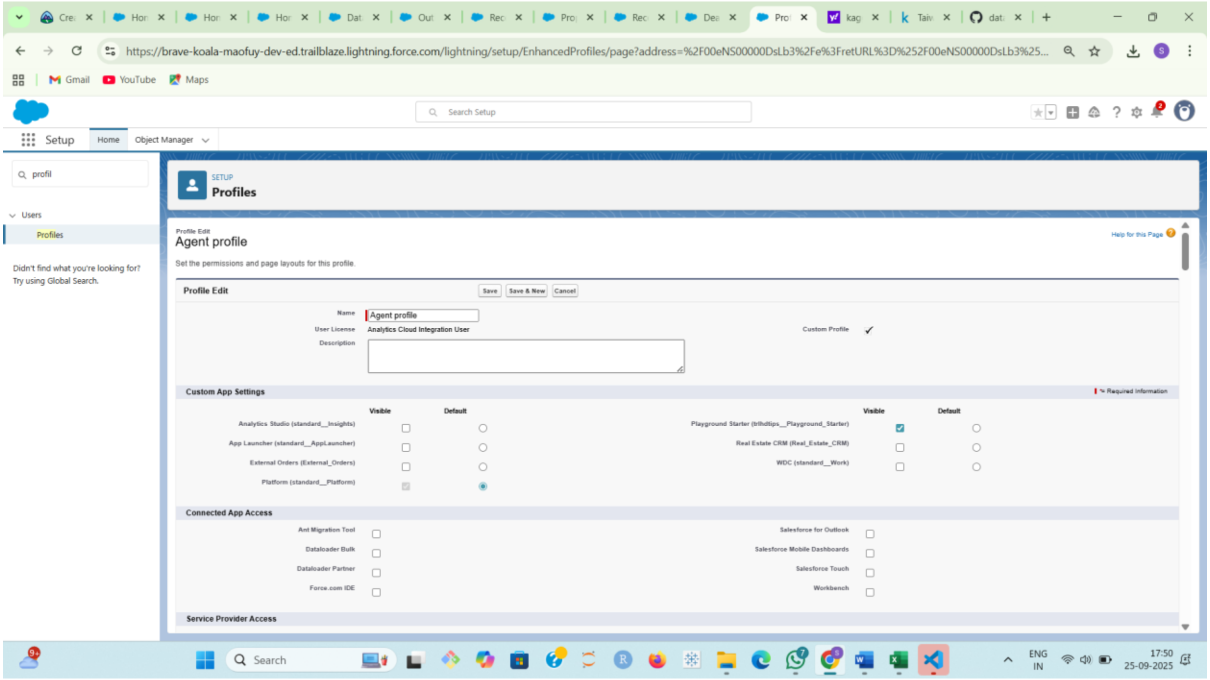
5. Field Level Security
   ○ Hide “Customer Financial Details” from Agents.



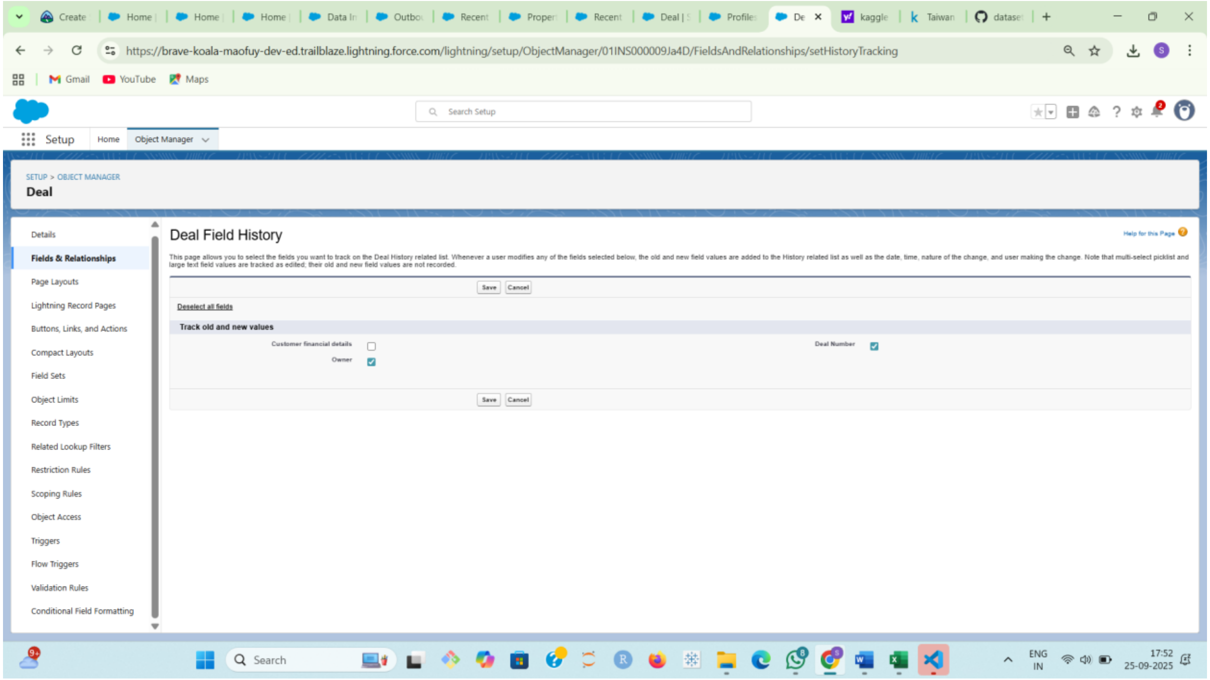
6. Session Settings
   ○ Timeout after 30 mins of inactivity.



7. Login IP Ranges
   ○ Restrict agents to office or authorized IP ranges.



9.Audit Trail
○ Track who made changes to Leads, Properties, and Deals.



Phase 10: Final Presentation & Demo Day

1. Pitch Presentation
   ○ Problem → Lack of organized property & lead management.
   ○ Solution → Real Estate CRM with lead tracking, property management, visit scheduling, and deal closure.
   ○ Benefits → Improved sales efficiency, better customer engagement, transparent reporting.

2. Demo Walkthrough
   ○ Show creating a new lead and assigning to an agent.
   ○ Schedule a property visit and track status.
   ○ Convert lead → deal and update property status (Sold/Rented).
   ○ Generate revenue & agent performance report.

3. Handoff Documentation
   ○ Share system design document.
   ○ Provide user guide for agents and managers.

4. LinkedIn/Portfolio Project Showcase
   ○ Publish project summary with screenshots/demos.
   ○ Highlight features like dashboards, dynamic reports, and security controls.