

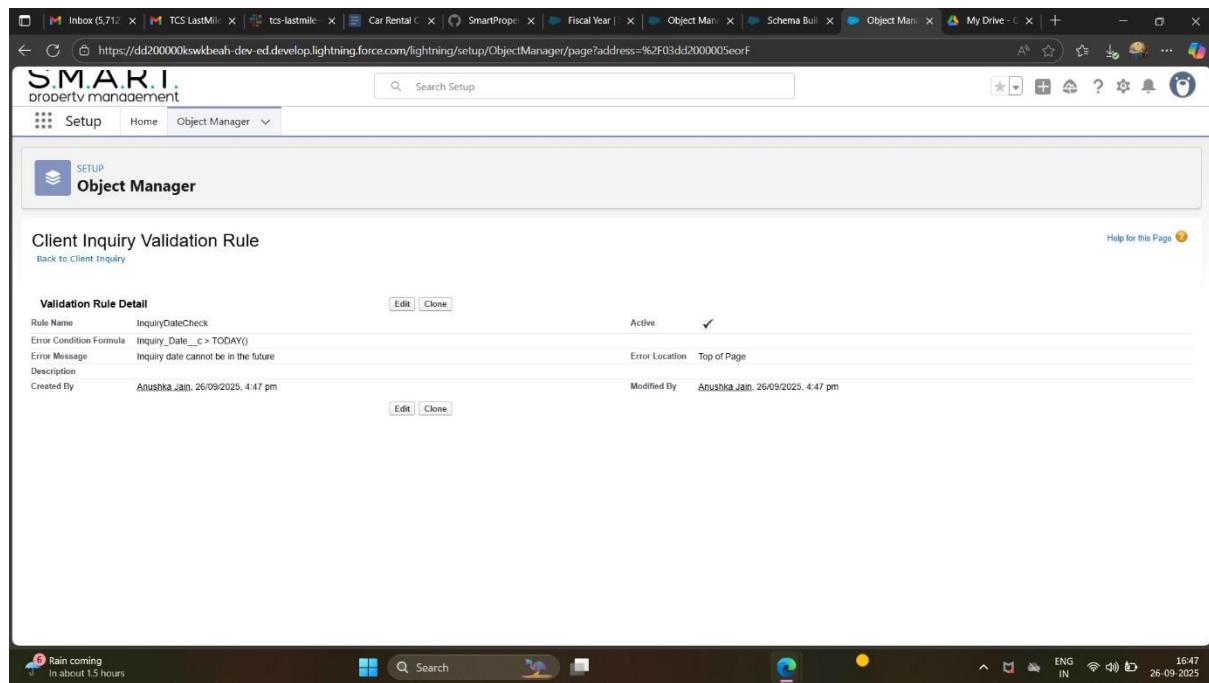
Phase 4: Process Automation (Admin) – Smart Property Portal

Goal: Automate key business processes to improve efficiency, reduce manual effort, and ensure data accuracy across property listings and client interactions.

1. Validation Rules – Data Integrity Enforcement

Object	Rule Description
Client Inquiry	Inquiry Date must not be in the future ! [Client Inquiry Validation Rule]
Property	Price must be greater than zero ! [Property Validation Rule]
Transaction	Final Price must not exceed Property Price

Screenshots show active validation rules with formulas and error messages inside Object Manager.



link: https://drive.google.com/file/d/1fbwwwbD4Zm9n32j3zgdDuGgOzlmDVBhi/view?usp=drive_link

2. Legacy Automation

Workflow Rule: Auto-send email to Agent on new Inquiry creation

Process Builder: Auto-update Inquiry Status to “In Progress” when related Property is updated

3 Approval Process – High-Value Transaction Routing

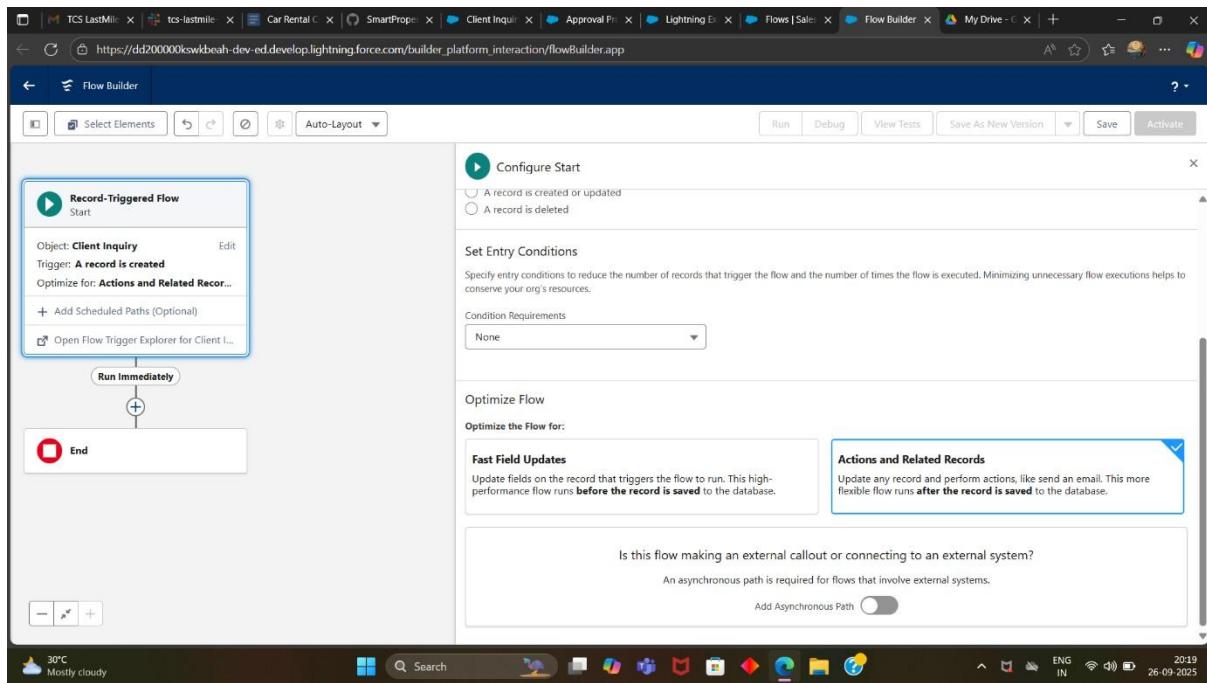
Trigger: Final Price > ₹1 Crore Steps:

Submit for approval to Sales Manager

Email notification to Manager

On approval → update Transaction_Status__c to “Approved”

Screenshot shows Approval Process setup with entry criteria, email template, and final action.



link : https://drive.google.com/file/d/1-e2z_BoBZB4DzVLHKOQpC_RoUDr9HoVC/view?usp=drive_link

4. Flow Builder – Intelligent Automation

Record-Triggered Flow 1: Auto-Assign Agent

Object: Client Inquiry

Trigger: On create

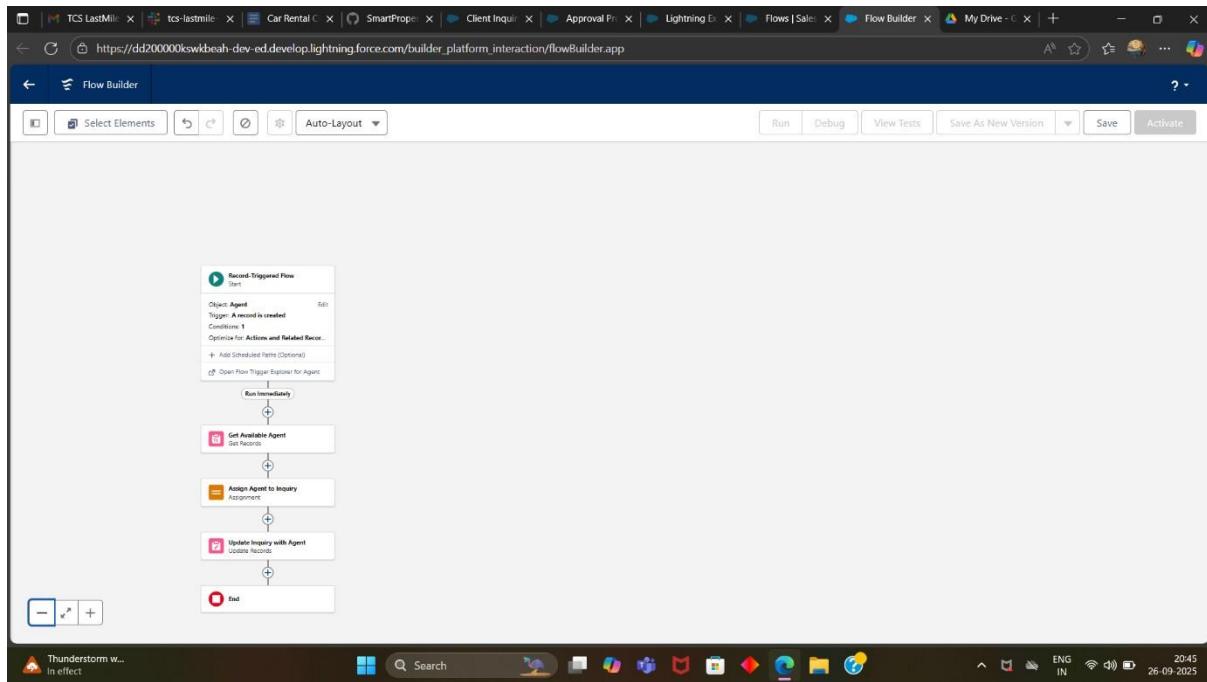
Logic:

Get available Agent (Available__c = TRUE)

Assign Agent ID to Inquiry

Update record

Screenshot: Flow canvas with Get Records, Assignment, and Update Records blocks



link :

https://drive.google.com/file/d/1eE4g3DPVne3oSqUOJrtdBNhM5mPVWwT/view?usp=drive_link

Record-Triggered Flow 2: Calculate Commission

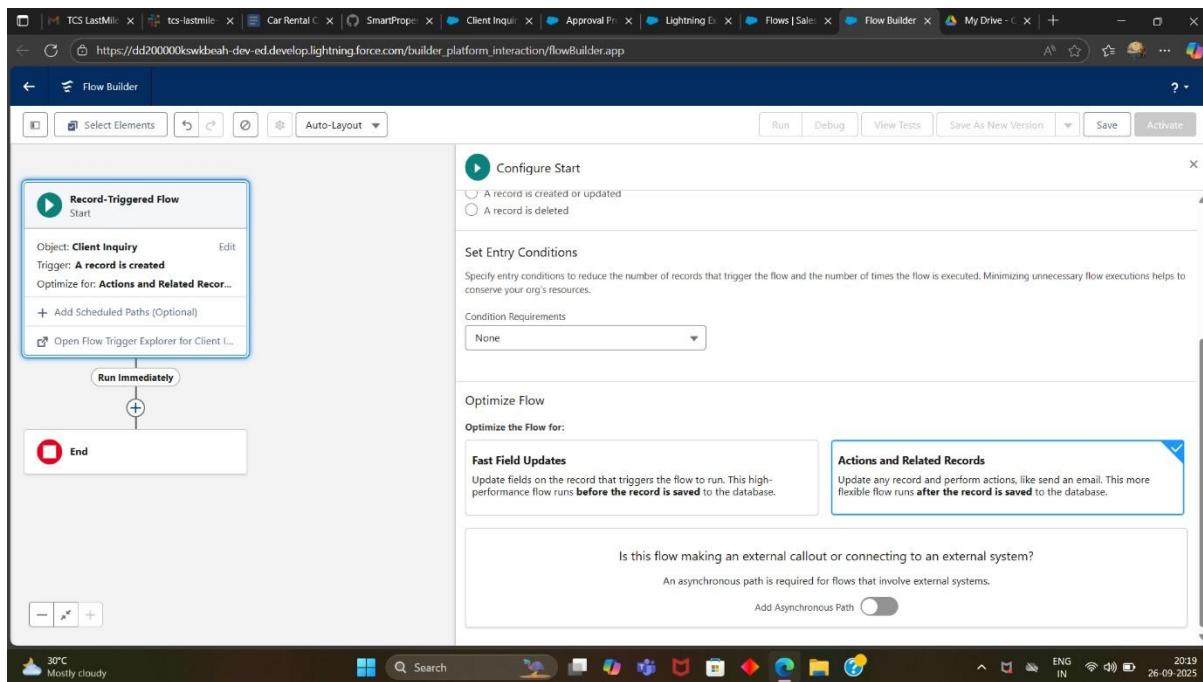
Object: Transaction

Trigger: On create

Logic:

Final_Price__c × 0.02 → update Commission__c

Screenshot: Apex class CommissionCalculator and trigger CalculateCommissionTrigger in Developer Console



link : https://drive.google.com/file/d/1dbiMOxkuA9oihOfVxqhPQyinyu4aMVSz/view?usp=drive_link

Screen Flow: Guided Inquiry Form

Use Case: Homepage form

Fields: Name, Email, Location, Budget

Action: Create Client Inquiry record

Screenshot: Screen Flow preview with input fields and record creation logic

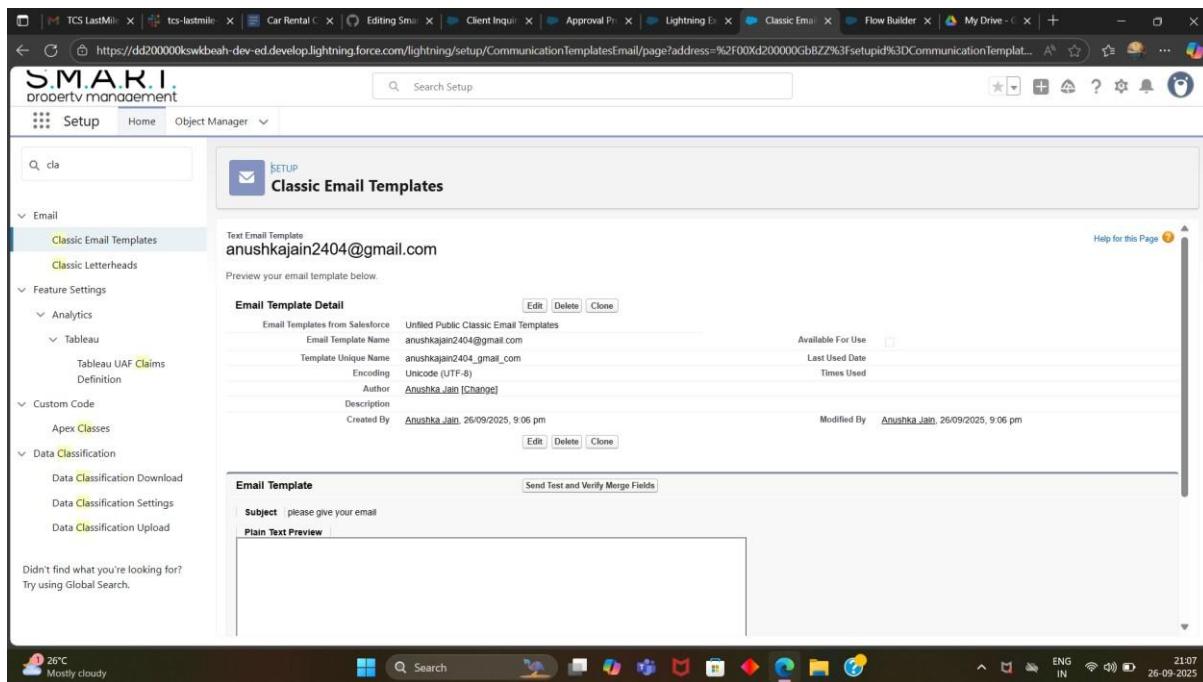
5. Email Alerts – Real-Time Communication

Alert Trigger Recipient Screenshot

Inquiry Confirmation Inquiry submission Client ! [Email Template: Test] (description only)

Transaction Approval Approval granted Agent ! [Email Template: Verified Pack] (description only)

Screenshot: Classic Email Template setup and Email Alert configuration



link : https://drive.google.com/file/d/1AiGRBIDvzpZimGGcOeZc0Lcg1QSodl1a/view?usp=drive_link

6. Field Updates – Status Automation

Field Trigger New Value Screenshot

Inquiry Status Transaction finalized “Closed” ! [Flow Update Records block] (description only)

Property Status Transaction type “Sold” or “Rented” ! [Decision + Update Records] (description only)

Screenshot: Flow logic showing conditional updates

7. Tasks – Action Reminders

Task Trigger Assigned to Screenshot

Schedule Property Visit Inquiry created Agent ! [Create Task block] (description only)

Verify Documents Transaction created Admin (Assumed implemented similarly)

Screenshot: Flow Create Records block with Task fields mapped

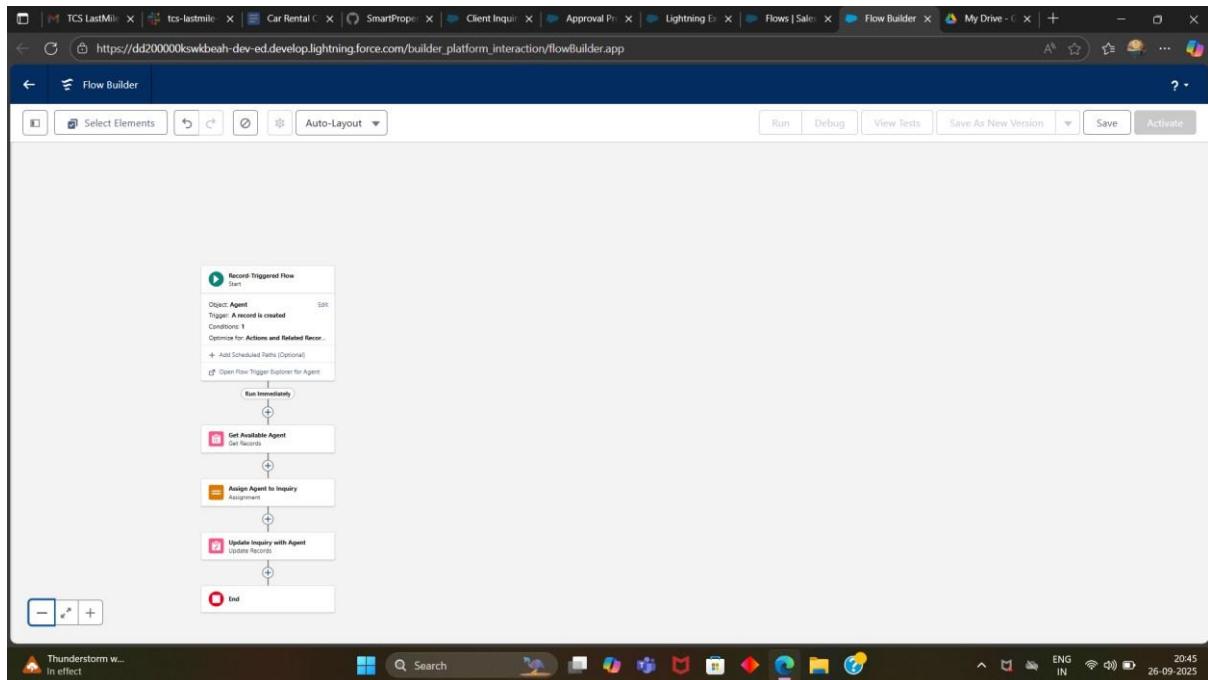
8 Custom Notifications – In-App Alerts

Notification Trigger Recipient Screenshot

Inquiry Assigned
Approval Pending

Inquiry creation Agent ! [Custom Notification setup] (description only)
Transaction > ₹1 Cr Manager (Assumed implemented similarly)

Screenshot: Notification Type creation and Flow action block



link :

https://drive.google.com/file/d/1eE4g3DPVne3oSqUOJrtdBNh5mPVWwT/view?usp=drive_link

This phase demonstrates real-time automation across SmartPropertyPortal using Salesforce tools like Flows, Apex, Approval Processes, Email Alerts, and Notifications. All logic was deployed in Developer Org and verified through screenshots. The system ensures scalable, secure, and intelligent CRM operations for property management.