

REAL ESTATE STREAMLINING SALESFORCE IMPLEMENTATION



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MANUAL OVERVIEW

PURPOSE

While using the Salesforce platform, this manual serves as a step-by-step implementation guide for salesforce administrators to create a qualification system and application. This System has allowed real estate agents to easily confirm and update clients with available homes on the market based on a specified criteria.

LET'S GET STARTED

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REAL ESTATE STREAMLINING MISSION

I built Real Estate Streamlining to accelerate the loan approval process for residential mortgage lenders, real estate agents, and their borrowers. This application will create a transparent process to align employees with its borrowers by utilizing flows and other automations to streamline the homebuying process. This application will empower our borrower's by allowing them the ability to track the status of their approval or denial. The application will also allow agents and borrowers to connect as soon as new homes hit the market that are in line with the borrowers specified criteria. This will allow the borrower to not miss a second in a swiftly moving home market. Lastly, the custom application will handle the storing and managing of the borrower's required documents as well as allowing collaboration across multiple teams which will in turn help with streamlining processes from origination to close.

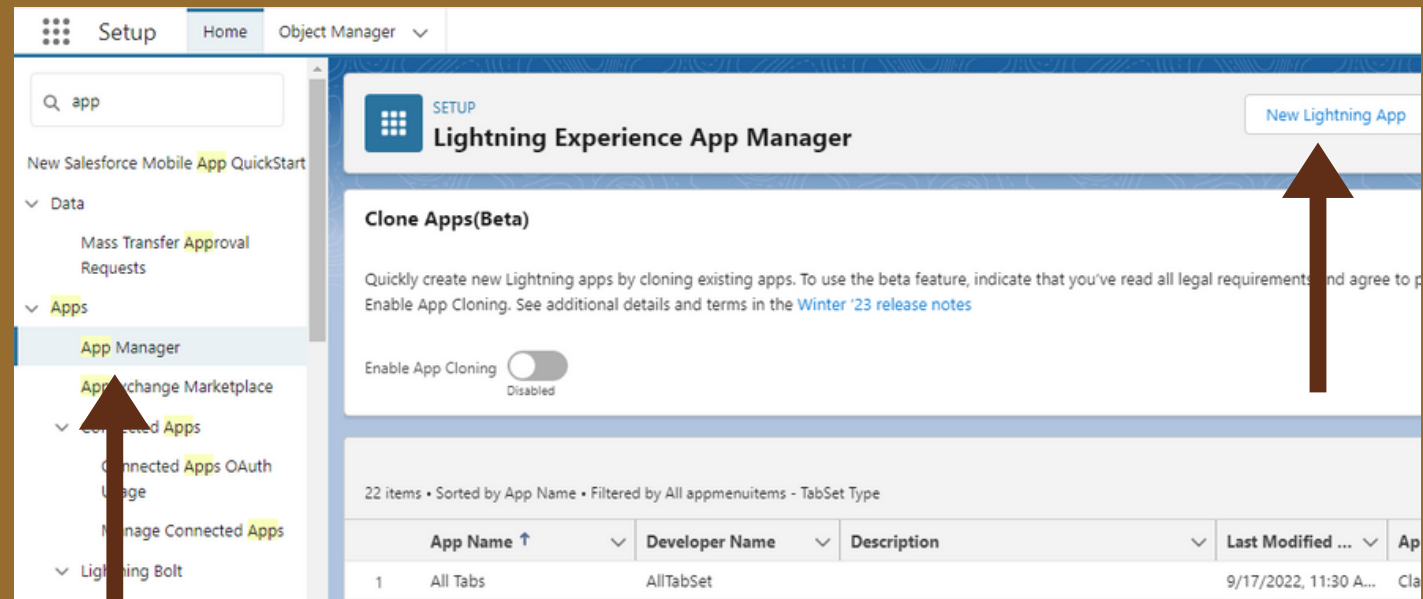
The Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters inside it. The logo is set against a dark blue background with a radial sunburst pattern.

salesforce

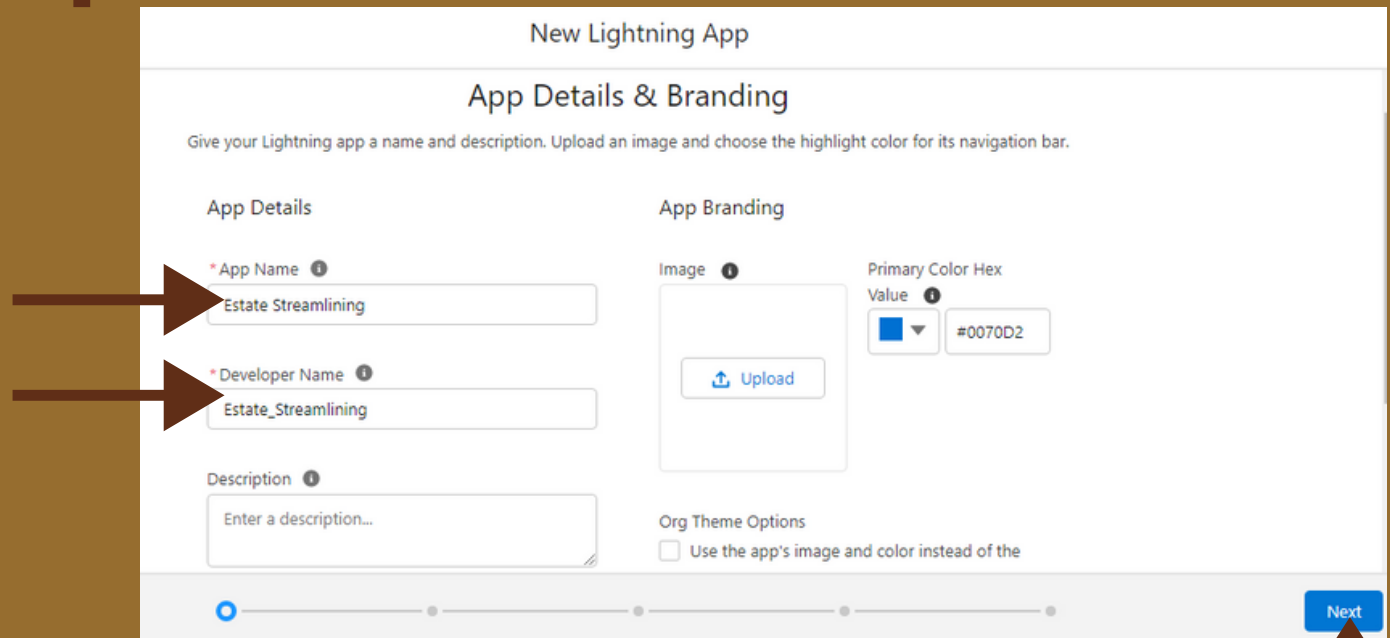
CREATING A LIGHTNING APPLICATION

INSTRUCTIONS

➤ Go to the **Setup** menu and type in **App Manager**. Next select **New Lightning App**.



➤ Next, give your application a **name** and the **developer name** will auto-populate. Then click **next**



CREATING A LIGHTNING APPLICATION

➤ Choose your specified **App Options**, then select **Next**

The screenshot shows the 'New Lightning App' setup screen with the 'App Options' section. It is divided into two columns: 'Navigation and Form Factor' and 'Setup and Personalization'. Under 'Navigation and Form Factor', there are two sections: '*Navigation Style' with radio buttons for 'Standard navigation' (selected) and 'Console navigation'; and '*Supported Form Factors' with radio buttons for 'Desktop and phone' (selected), 'Desktop', and 'Phone'. Under 'Setup and Personalization', there are two sections: 'Setup Experience' with radio buttons for 'Setup (full set of Setup options)' (selected) and 'Service Setup'; and 'App Personalization Settings' with checkboxes for 'Disable end user personalization of nav items in this app' and 'Disable temporary tabs for items outside of this app', both of which are currently unchecked.

➤ Next, use **App Navigation** to select the items you want included in the app, then select **next**.

The screenshot shows the 'New Lightning App' setup screen with the 'App Navigation' section. It features two panels: 'Available Items' on the left and 'Selected Items' on the right. The 'Available Items' panel has a search bar and a list of items including Business Brands, Calendar, Campaigns, Card Payment Methods, Cases, Change Requests, and Chatter. A large brown arrow points from 'Card Payment Methods' to the right arrow button between the panels. The 'Selected Items' panel currently contains 'Accounts', 'Bills', and 'Clients'.

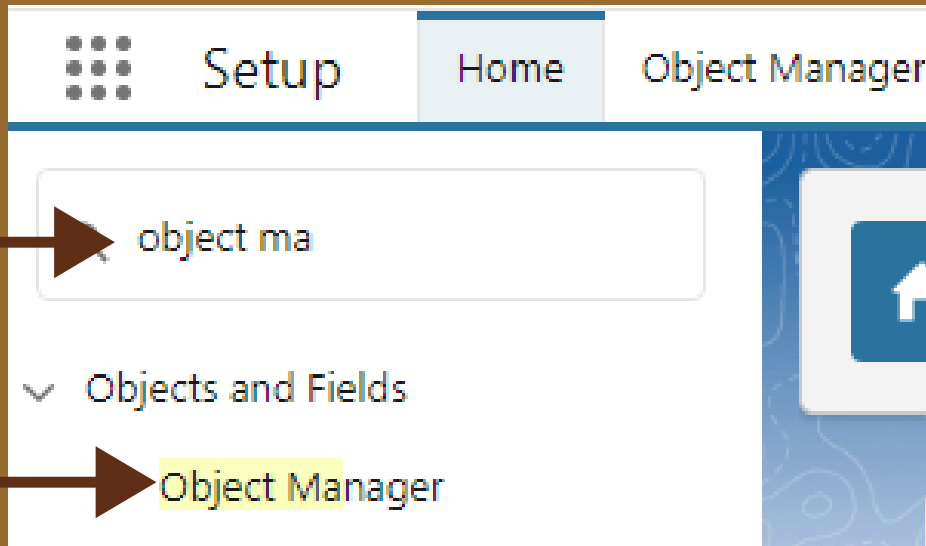
➤ Lastly, select the **User Profiles** that will access the application, then select **save & finish**.

The screenshot shows the 'User Profiles' selection screen. It has a title 'User Profiles' and a subtitle 'Choose the user profiles that can access this app.' Below this, there are two panels: 'Available Profiles' on the left and 'Selected Profiles' on the right. The 'Available Profiles' panel has a search bar and a list of profiles including 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', and another 'Authenticated Website'. A large brown arrow points from the search bar to the right arrow button between the panels. The 'Selected Profiles' panel currently contains 'CRM Lead'.

CREATING A CUSTOM OBJECT

INSTRUCTIONS

➔ Go to the **Setup Menu** and type in **Object manager**, then select **object manager**



➔ Next, select **Create**, then select **Custom object**. Then fill in all the required details for your object and select **save**

A screenshot of the 'New Custom Object' form in Salesforce Setup. The form is titled 'New Custom Object' and has a 'SETUP' tab. It contains several sections for defining the custom object. The 'Custom Object Information' section includes fields for 'Label' (Backlog), 'Plural Label' (Backlogs), and 'Object Name' (Backlog). The 'Description' field is empty. The 'Context-Sensitive Help Setting' section has two radio buttons: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section includes a 'Record Name' field (Backlog Name) and an 'Example' (Account Name). Red arrows point to the 'Label', 'Plural Label', 'Object Name', and 'Record Name' fields.

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with level sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

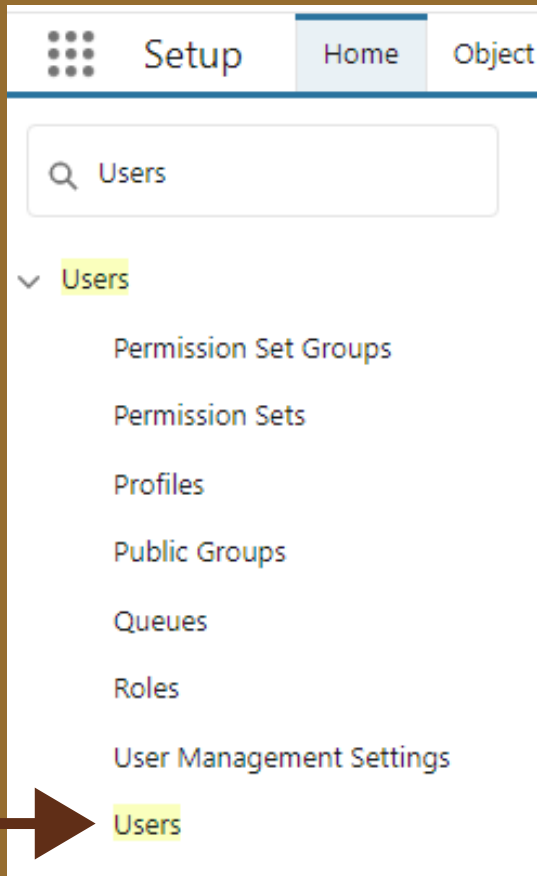
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

CREATING A USER

INSTRUCTIONS

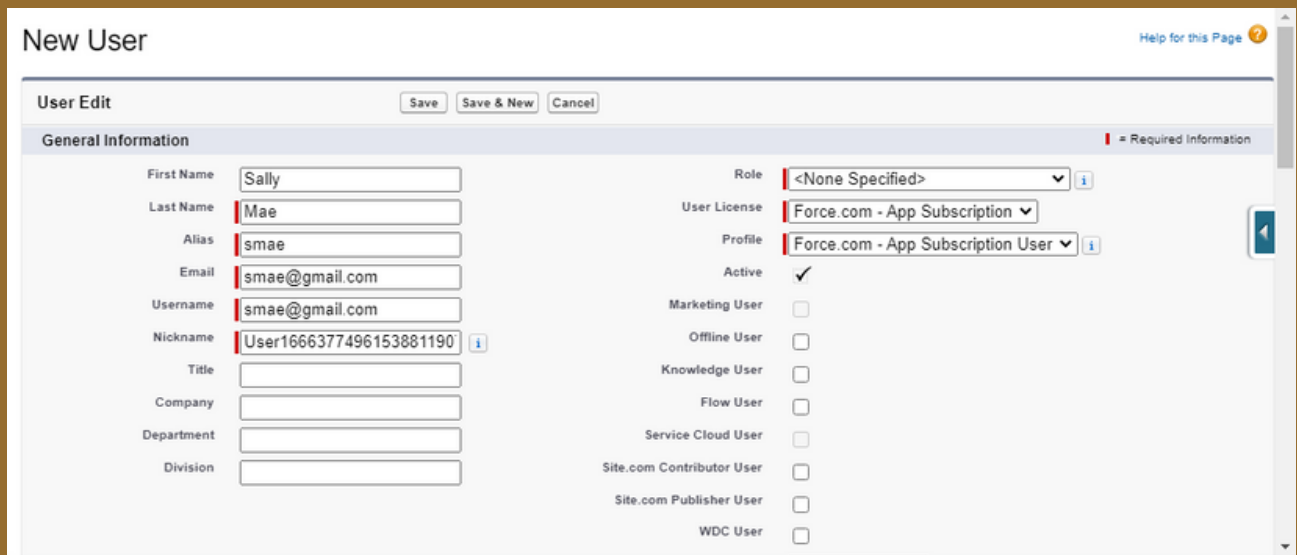
➤ Go to the **Setup Menu** and type in **Users**, then select **Users**



The screenshot shows the Salesforce Setup menu. The 'Setup' tab is active, and a search bar contains the text 'Users'. Below the search bar, a list of options is displayed, including 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The 'Users' option is highlighted with a yellow background, and a large brown arrow points to it from the left.



➤ Select **New User**, then fill in all the required fields about your user. Lastly, select **save**.

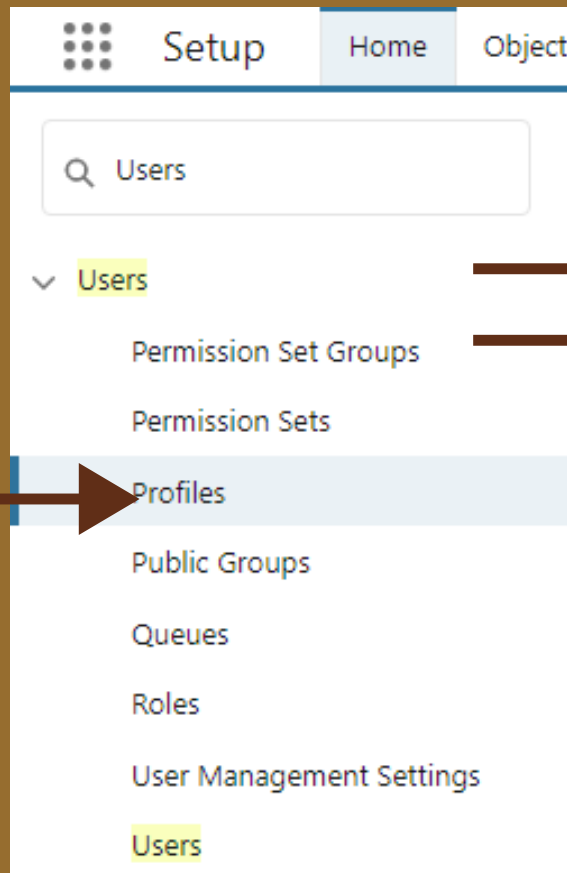


The screenshot shows the 'New User' form in Salesforce. The form is titled 'New User' and has a 'User Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'General Information' section contains fields for First Name (Sally), Last Name (Mae), Alias (smae), Email (smae@gmail.com), Username (smae@gmail.com), Nickname (User1666377496153881190), Title, Company, Department, and Division. The 'Role' field is set to '<None Specified>', and the 'User License' is set to 'Force.com - App Subscription'. The 'Profile' is set to 'Force.com - App Subscription User'. The 'Active' checkbox is checked, and the 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User' checkboxes are unchecked. A red bar at the top right indicates that some fields are required.

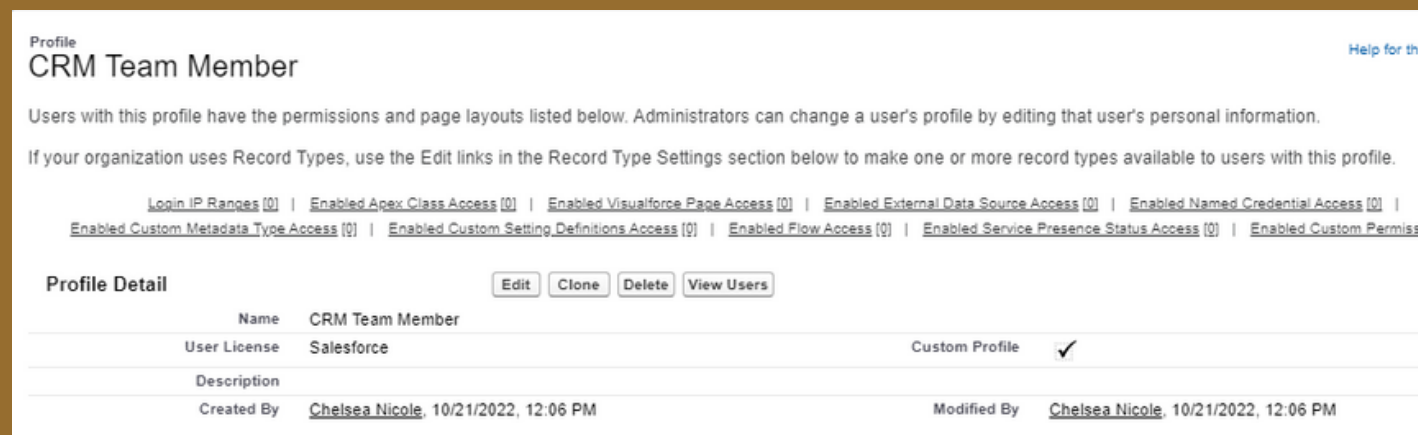
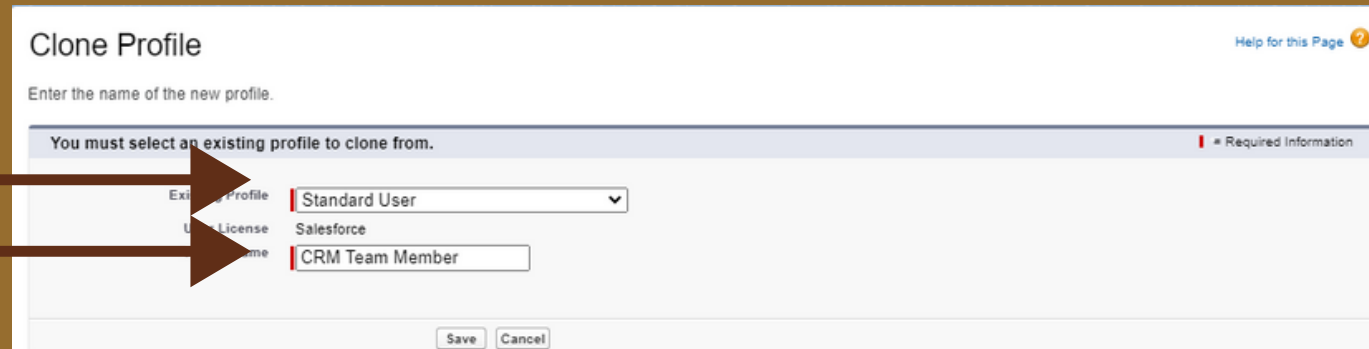
CREATING DIFFERENT PROFILES

INSTRUCTIONS

➤ Go to the **Setup Menu** and type in **Users**, then select **Profiles**.



➤ Select **New Profile**, select the existing profile to clone then name the new profile



IMPORTING DATA

INSTRUCTIONS

➤ **Setup >> Search Data Import Wizard >> Launch Wizard >> Select Custom Object "Requests" >> Select CSV File with Data >> Map Fields >>**

➤ **Once you have imported your data, you can select the data to run a report.**

Choose data Edit mapping Start Import

Review & Start Import

Review your import information and check that report.

Your selections:

- Requests ✓
- Add new records ✓
- Import all records ✓

Your import will include:

Mapped fields: 5

Your import will not include:

Unmapped fields: 0

Start Import

20

	Request: Requests Name ▾	City ▾	Email ▾
1	Jaya	Nong 'Yai	gcstairs0@vinaora.com
2	Gigabox	Chaoshui	amogair1@google.de
3	Gobtype	Asha	jclausner2@buznfeed.com
4	Chatterbridge	Mt Polo	abradam3@phoca.cz
5	Gerba	Eldonet	ncenels4@clickbank.net
6	Zoombeat	Fifi	mrouttree5@un.org
7	Yodoo	Querecotillo	tpwey6@quantcast.com
8	Skajo	Xianxi	chontigan7@ovh.net
9	Zazio	Groewang Lar	vnewberry8@sohu.com
10	Mymm	Pavshino	zohels9@gmail.com
11	Wareware	Gombong	omacknockibera@nps.gov
12	Topiczoom	Lijialchang	femmerb@google.es
13	Youfeed	Olesno	kollecambec@artisteer.com
14	Dabvine	Paixel	evallerd@qq.com
15	Blognation	Leojic	cbrunstan@yorku.com



CREATING AND CUSTOMIZING A LIST VIEW

INSTRUCTIONS

- 1. Click **Create New** at the top of a **List Page**.
2. Enter the **View Name**.
3. Enter the **Unique View Name**.
4. Specify the **Filter Criteria**.
5. Select the **Fields** you want to display on the **List View**.
6. Select **Save**.

The screenshot displays a web application interface for managing inventories. At the top, there's a header with a diamond icon and the text 'Inventories'. Below this, a dropdown menu shows 'New Invent List View' with a pin icon. To the right of the header are buttons for 'New', 'Import', 'Change Owner', and 'Printable View'. A search bar labeled 'Search this list...' is positioned below the header. Below the search bar, a status bar indicates '3 items • Sorted by Inventory Current Saler • Filtered by My inventories - Status of Inventory • Updated 3 minutes ago'. The main content area shows a table with three items, each with a checkbox and a name: 'Chris beat', 'Jose Brass', and 'Rebecca Villas'. To the right of the table is a 'Filters' panel. The panel has a close button (X) and contains two filter boxes. The first box is labeled 'Filter by Owner' and contains the text 'My inventories'. The second box is labeled 'Status of Inventory' and contains the text 'equals Listed for Sale'. Below the filter boxes, there are links for 'Add Filter' and 'Remove All'. At the bottom of the panel, there is a link for 'Add Filter Logic'.

	<input type="checkbox"/> Inventory Current Saler ↑	
1	<input type="checkbox"/> Chris beat	▼
2	<input type="checkbox"/> Jose Brass	▼
3	<input type="checkbox"/> Rebecca Villas	▼

Filters

Filter by Owner
My inventories

Matching all of these filters

Status of Inventory
equals Listed for Sale

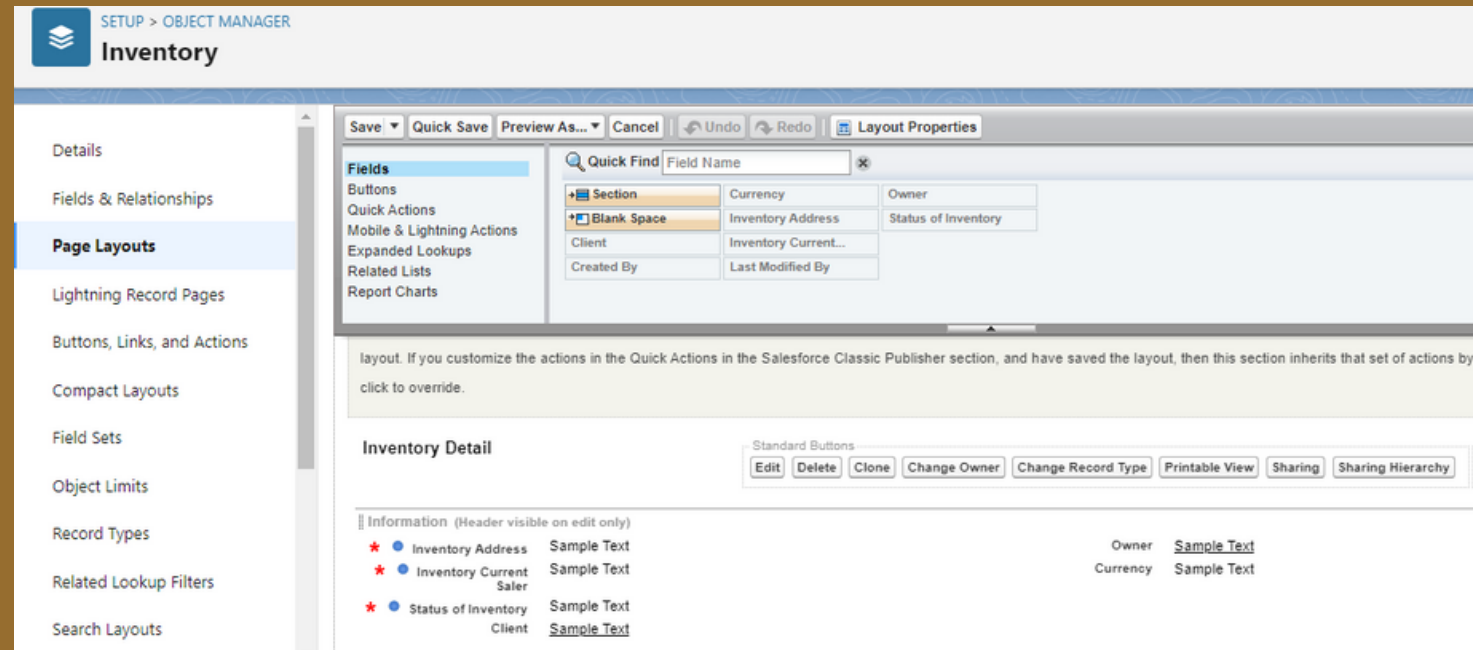
Add Filter Remove All

Add Filter Logic

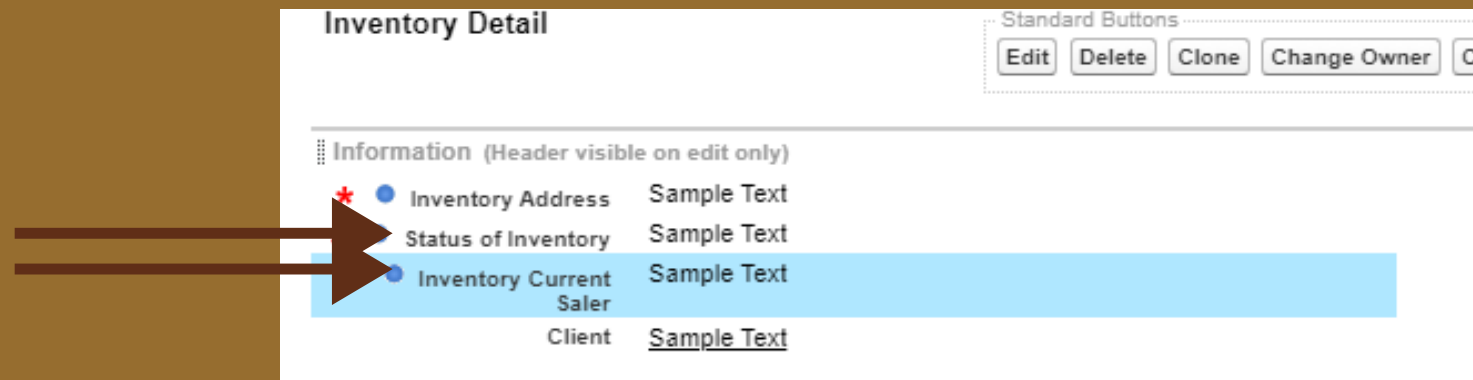
CUSTOMIZING AN OBJECT PAGE LAYOUT

INSTRUCTIONS

➤ In *Object Manager*, Select one of your custom objects. Next you want to select *Page Layouts* using the side panel.



In the *Inventory Detail Section* you can customize and rearrange fields in the specified order of your liking.



➤ In the photos above I have customized the page layout by rearranging the fields into a different order.

CREATING A LOOKUP FIELD

INSTRUCTIONS

➤ Custom Object: Client

Setup > Object Manager > "Client" > Fields & Relationships > Select Lookup Relationship > Related object: Inventory > Name the field label and other required fields > Select Next > Next > Save

New Relationship Help for this Page

Step 3. Enter the label and name for the lookup field Step 3 of 6

Previous Next Cancel

Field Label i

Field Name i

Description

Help Text i

Child Relationship Name i

Required ☐ Always require a value in this field in order to save a record

What to do if the lookup record is deleted? ☒ Clear the value of this field. You can't choose this option if you make this field required.

☐ Don't allow deletion of the lookup record that's part of a lookup relationship.

CREATING A FLOW

I created a record flow for Real Estate Streamlining to send out an email to specified recipients whenever an inventory record updates to “Listed for Sale”. Below shows step-by-step of how this flow was created.

INSTRUCTIONS

➤ **Setup > Search "Flows"**
> Select "New Flow" >
Choose "Record-Triggered Flow" >
Select the Object >
Configure the Trigger >
Set the Conditions >
Click Done

The screenshot shows the 'Configure Start' dialog box for creating a record flow. It is divided into three main sections: 'Select Object', 'Configure Trigger', and 'Set Entry Conditions'.

- Select Object:** The 'Object' field is set to 'Inventory'.
- Configure Trigger:** The 'Trigger the Flow When:' section has four radio button options: 'A record is created', 'A record is updated' (which is selected), 'A record is created or updated', and 'A record is deleted'.
- Set Entry Conditions:** This section includes a 'Condition Requirements' dropdown set to 'All Conditions Are Met (AND)'. Below this, there are two condition rows:
 - Row 1: Field 'Status_of_Inventory__c', Operator 'Equals', Value 'Listed for Sale'.
 - Row 2: Field 'Status_of_Inventory__c', Operator 'Is Changed', Value 'True'.Each row has a trash icon to its right. At the bottom of the conditions section is a '+ Add Condition' button.

At the bottom right of the dialog are 'Cancel' and 'Done' buttons.

CREATING A FLOW

INSTRUCTIONS

➤ Add Element > Action > Select Email on the side panel > Select "Send Email" in the Action text bar > Input the details > Select Done

The screenshot shows the 'Edit "Send Email" core action' window. At the top, it says 'Send Email to Agent (Send_Email_to_Agent)'. Below this is a 'Set Input Values' section. It includes fields for 'Body' (containing '{!body}'), 'Subject' (containing '{!subject}'), 'Recipient Email Addresses (collection)' (with a 'Don't Include' toggle), 'Recipient Email Addresses (comma-separated)' (containing 'dougcn0@gmail.com' and an 'Include' toggle), 'Rich-Text-Formatted Body' (containing '{!\$Global.Constant.True}' and an 'Include' toggle), and 'Sender Email Address' (containing 'dougcn0@gmail.com' and an 'Include' toggle). At the bottom are 'Cancel' and 'Done' buttons.

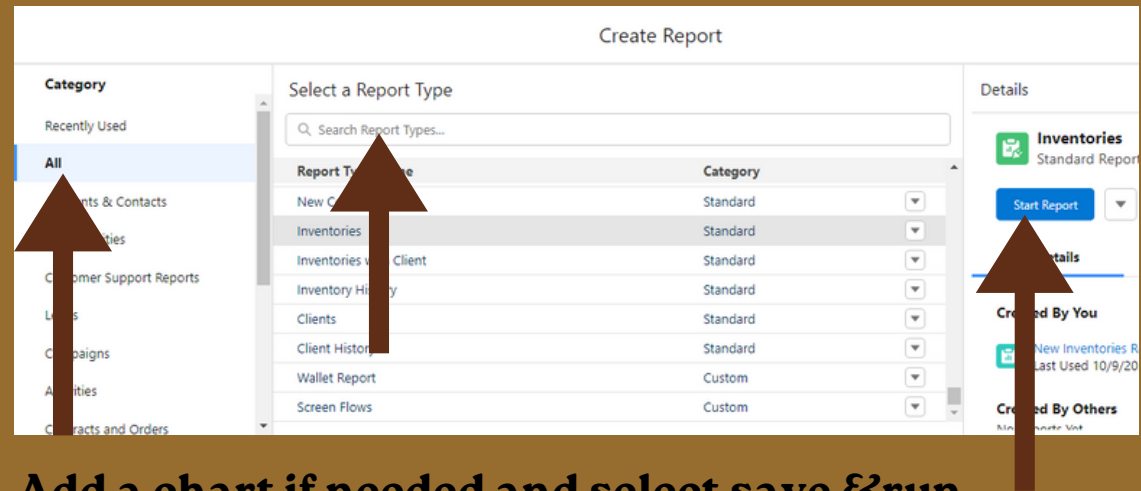
➤ Next save the flow. Then click "activate".
To check the flow, I went to a record on the inventory object and updated the record to "Listed for sale" and the email sent successfully.

The screenshot shows the 'New Resource' window. It has fields for 'API Name' (containing 'text') and 'Description'. Below these is a 'Body' section with a rich text editor. The body content includes a search bar 'Insert a resource...', a 'View as Rich Text' dropdown, and text: 'Property (!\$Record.Inventory.Address_c) is listed for sale! Below are the respective details!' and 'Current Owner: (!\$Record.Name)'. At the bottom is a rich text toolbar with various formatting options. At the very bottom are 'Cancel' and 'Done' buttons.

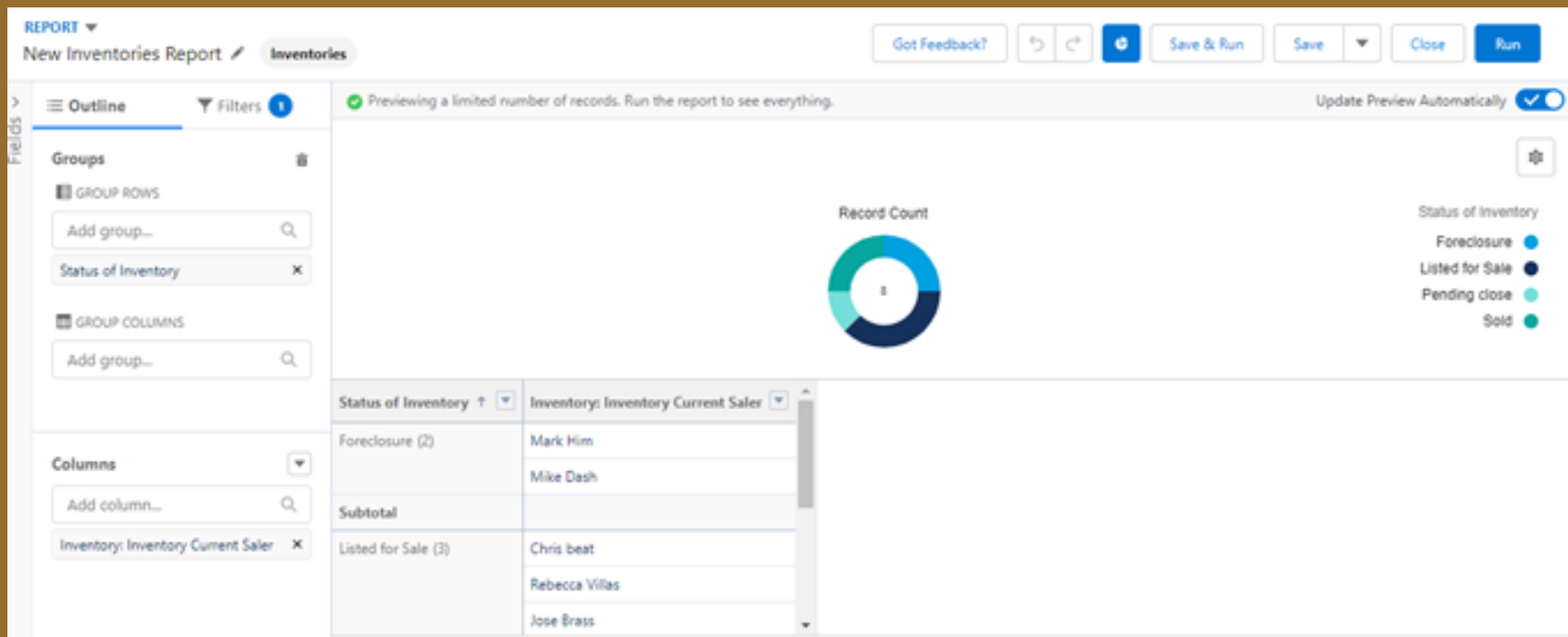
CREATING A REPORT

INSTRUCTIONS

- Go to the Application > Select the Report tab > Click New Report > Category should be "All" > Select the Report Type > Select "Start Report"



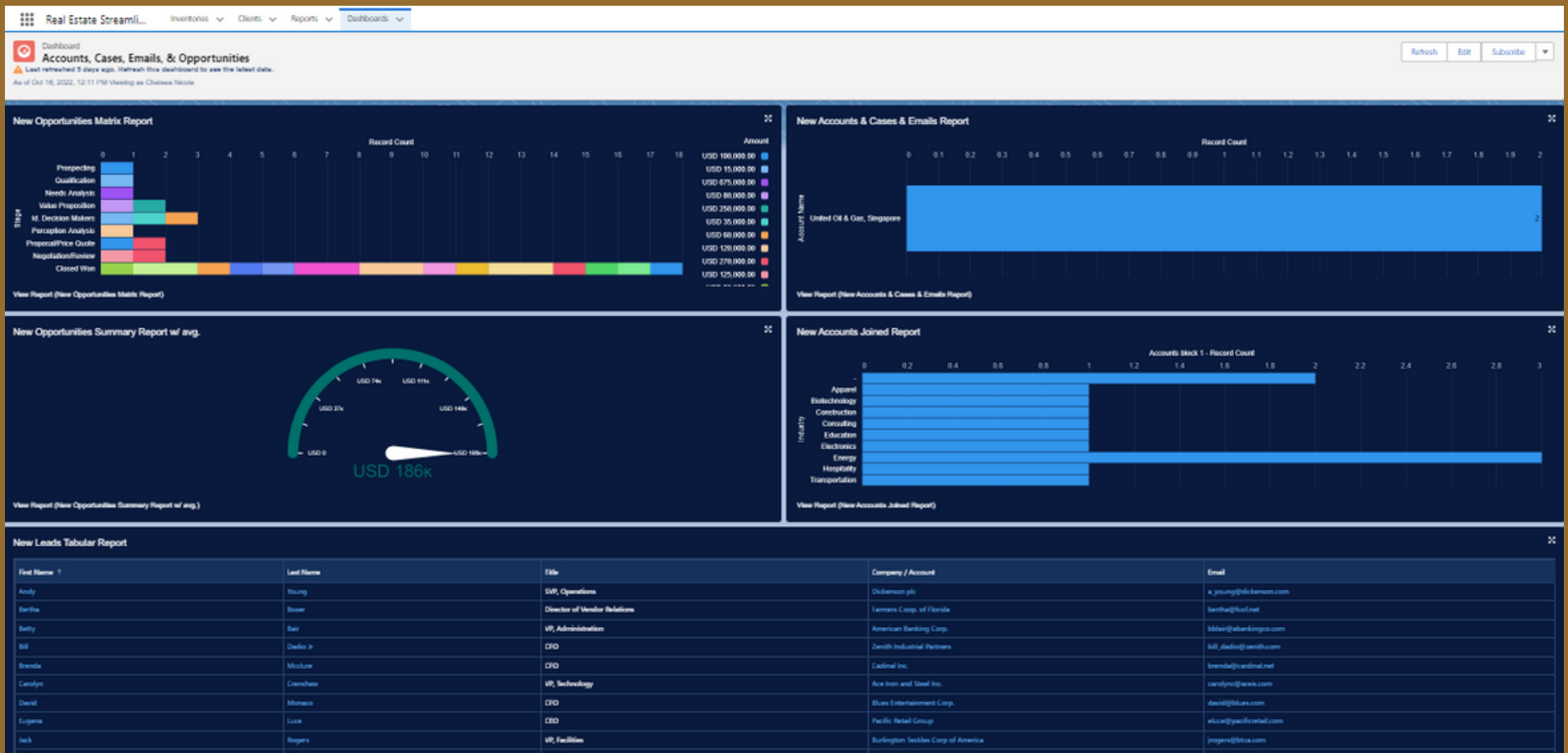
- Specify your groups and columns. Add a chart if needed and select save & run.
- The below report shows the properties that are listed for sale, pending sale, sold, etc. as well as its sellers. This allows clients to see first-hand what is on the market and available to them.



CREATING A DASHBOARD

INSTRUCTIONS

➤ After building your Inventory Report, go to the Dashboard tab >> select New >> apply the graphs that will offer the best results for your organization.



CREATING AN EMAIL NOTIFICATION

INSTRUCTIONS

➤ Go to Setup > email template > Select "Classic Email Template" > Select New Template > Choose text > Select Next > Fill in the Template Information and select save

The screenshot shows the 'Classic Email Templates' setup interface. At the top, there's a 'SETUP' header with an envelope icon. Below it, the title 'Classic Email Templates' is highlighted in yellow. The main area is divided into two sections. The top section, 'Select Field Type', has a dropdown menu set to 'Client Fields', a 'Select Field' dropdown set to 'Agent', and a 'Copy Merge Field Value' text box containing '({Client__c.Agent__c})'. Below this is a note: 'Copy and paste the merge field value into your template below:'. The bottom section, 'Email Template Edit', has buttons for 'Save', 'Save & New', and 'Cancel'. It contains the following fields: 'Folder' (dropdown set to 'My Personal Email Templates'), 'Available For Use' (checkbox checked), 'Email Template Name' (text box with 'Real Estate Match'), 'Template Unique Name' (text box with 'Real_Estate_Match'), 'Encoding' (dropdown set to 'Unicode (UTF-8)'), 'Description' (empty text box), 'Subject' (text box with 'Client / Real Estate Match!'), and 'Email Body' (text area with 'Hi ({Client__c.Agent__c})' followed by a paragraph about property criteria and a 'Thank you!' message). A red asterisk indicates required information.

➤ Go to Setup > email alert> Select continue> Select New Email Alert > Fill in the required fields and select save.

The screenshot shows the 'Email Alerts' setup interface. At the top, there's a 'SETUP' header with a gear icon. Below it, the title 'Email Alerts' is highlighted in yellow. The main area is titled 'Edit Email Alert'. It contains the following fields: 'Description' (text box with 'Customer Property Criteria Match'), 'Unique Name' (text box with 'Customer_Property_Criteria'), 'Object' (dropdown set to 'Client'), 'Email Template' (dropdown set to 'Real Estate Match'), and 'Protected Component' (checkbox unchecked). Below these is a 'Recipient Type' section with a 'Search' dropdown set to 'Owner', a 'for:' text box, and a 'Find' button. At the bottom, there are two columns: 'Available Recipients' (list with '--None--') and 'Selected Recipients' (list with 'Client Owner'). Between these columns are 'Add' and 'Remove' buttons with right and left arrow icons respectively.



THANK YOU

Chelsea Douglas