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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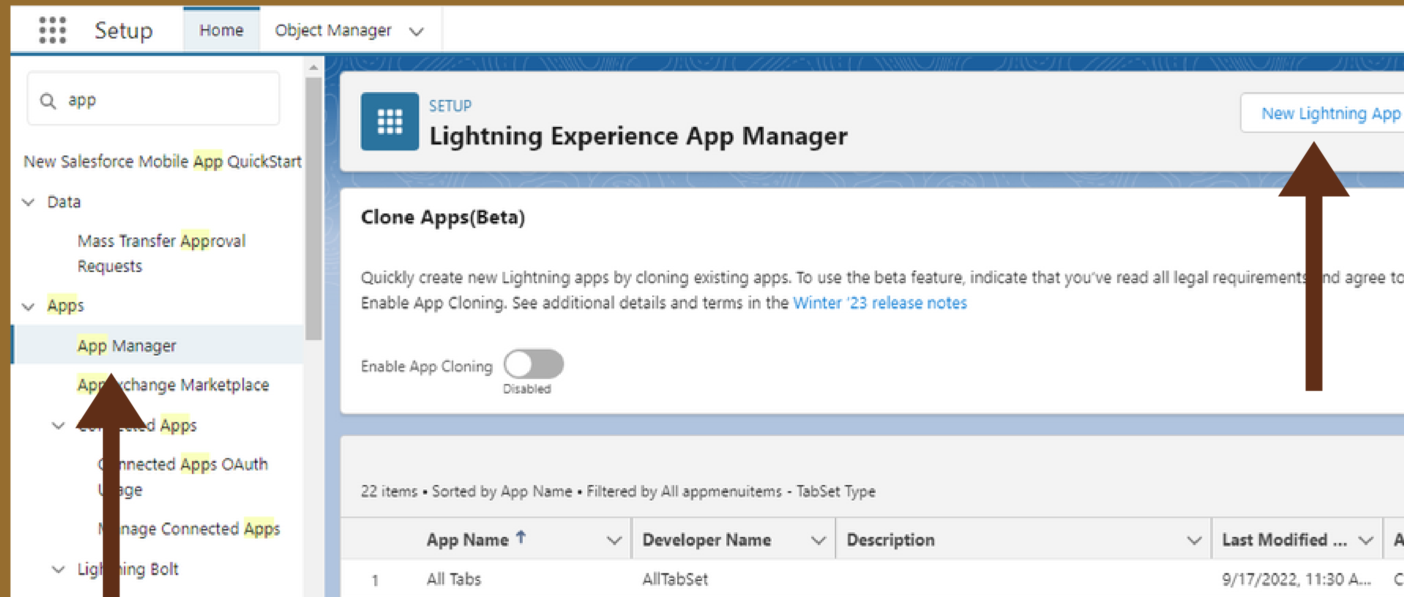
REAL ESTATE STREAMLINING MISSION

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.

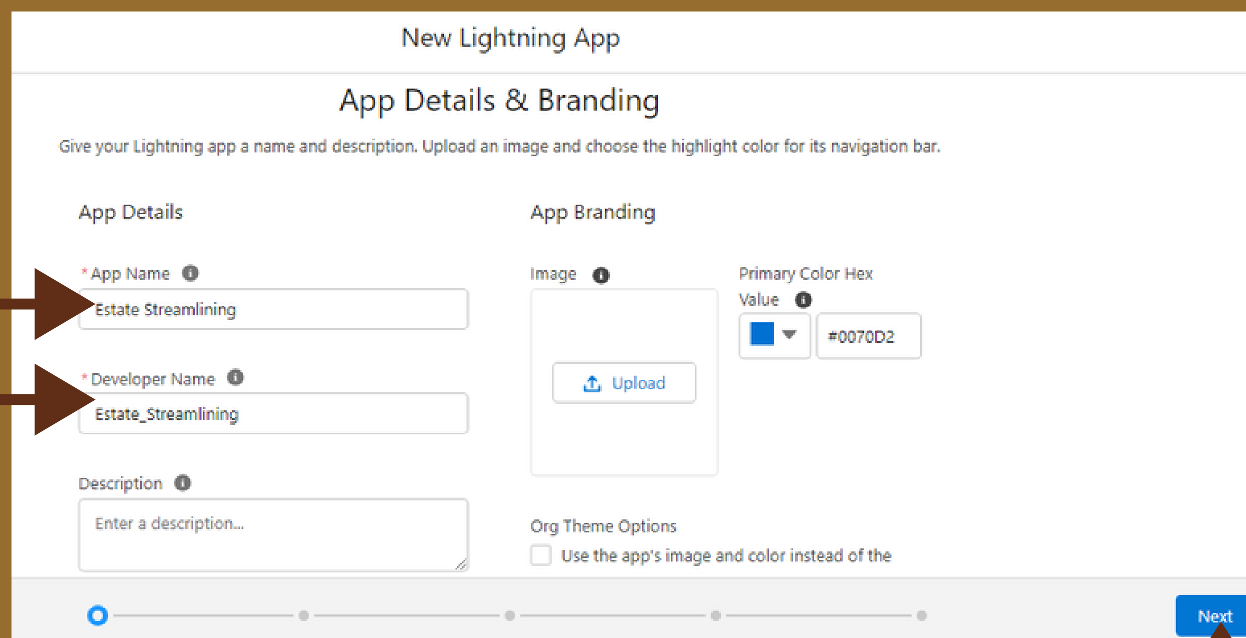
CREATING A LIGHTNING APPLICATION

INSTRUCTIONS

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

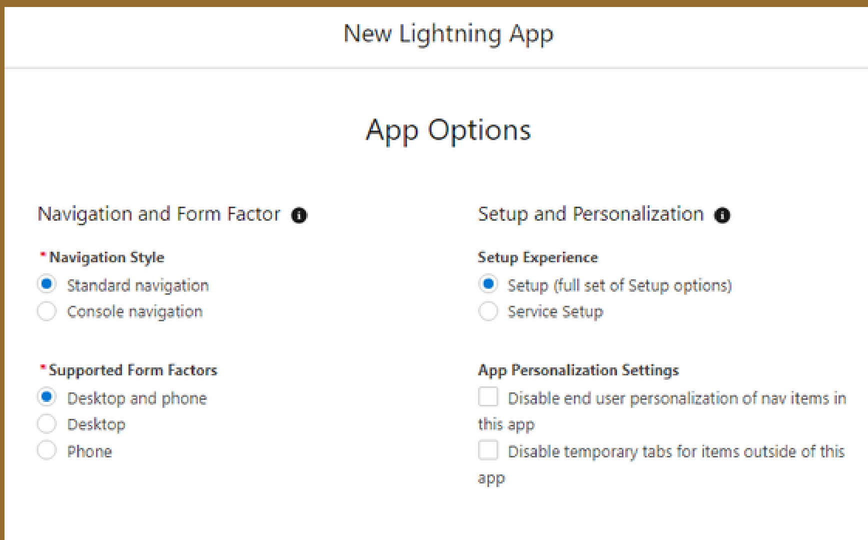


Next, give your ***application a name*** and the ***developer name*** will auto-populate. Then click ***next***

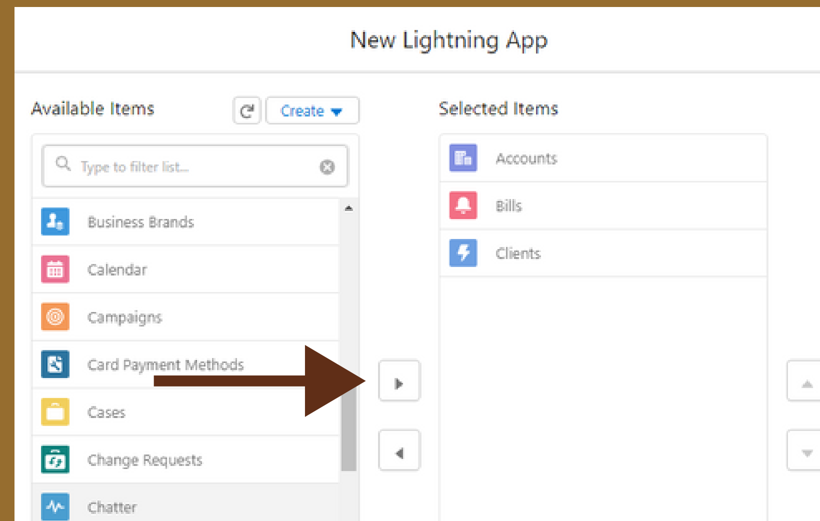


CREATING A LIGHTNING APPLICATION

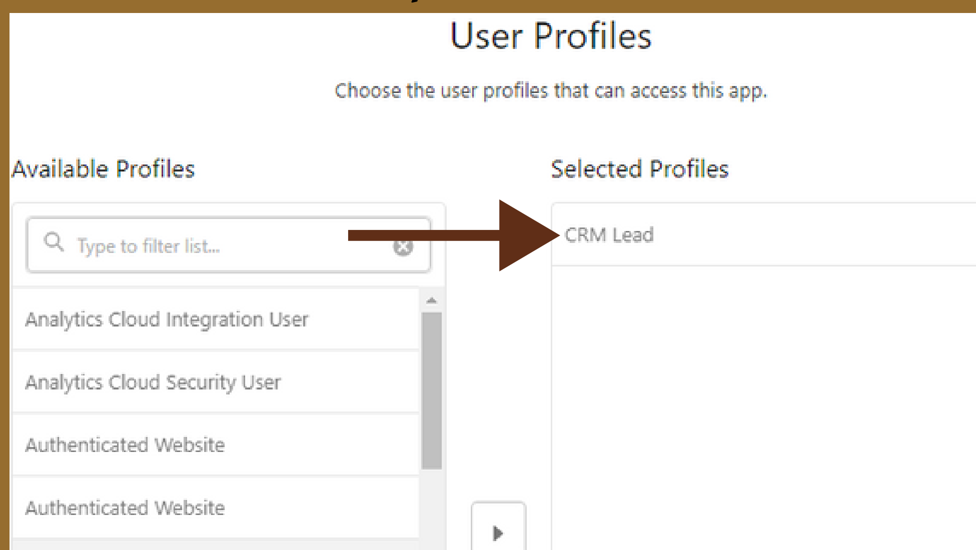
Choose your specified *App Options*, then select *Next*



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



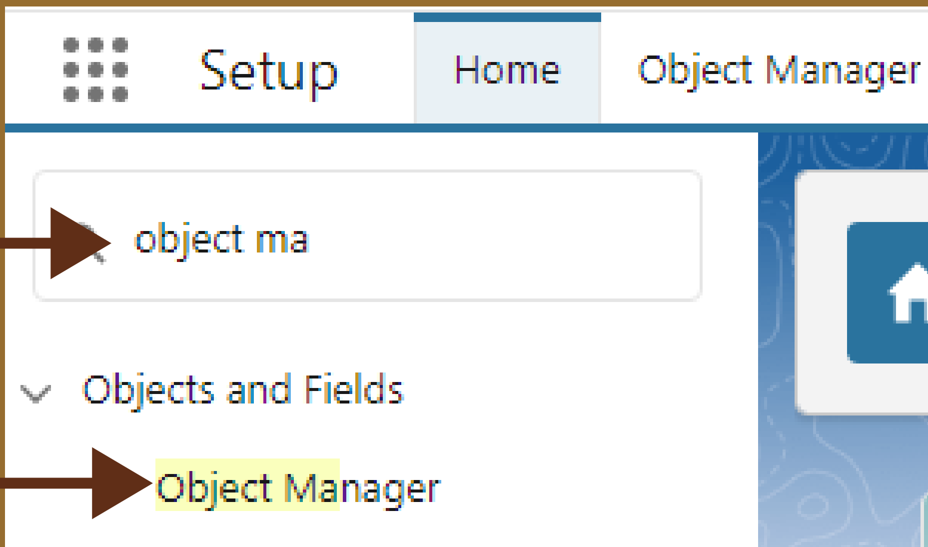
Lastly, select the *User Profiles* that will access the application, then select *save & finish*.



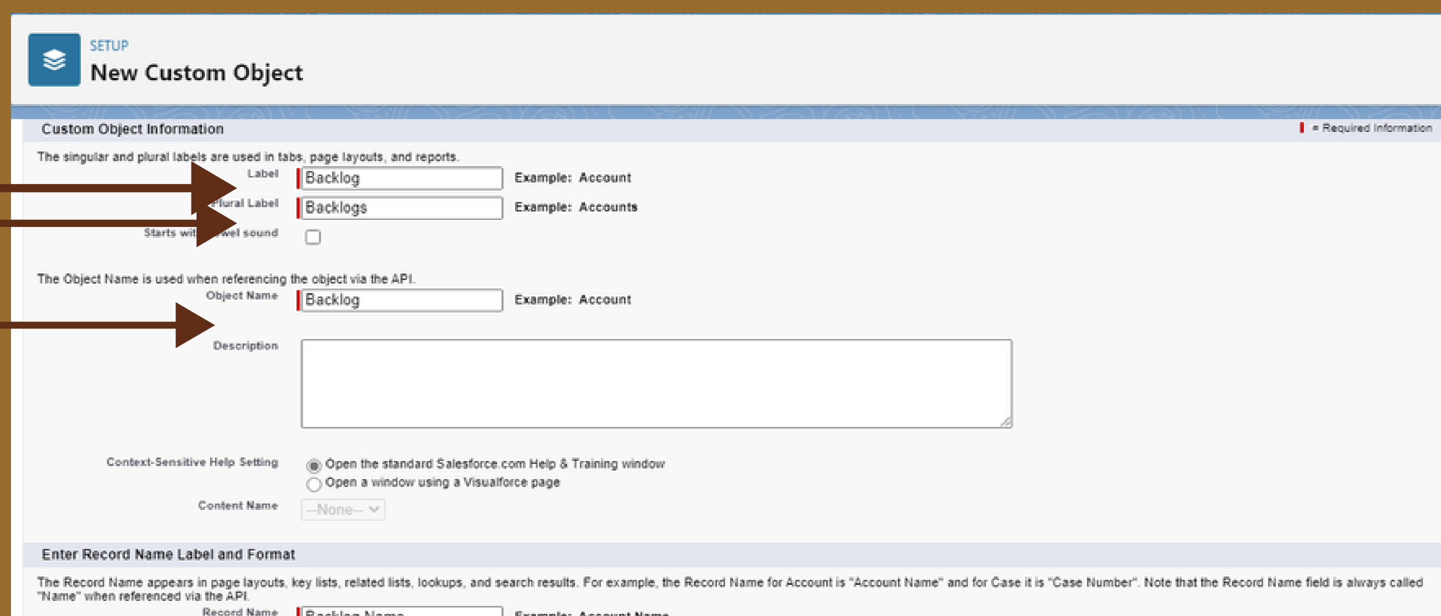
CREATING A CUSTOM OBJECT

INSTRUCTIONS

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



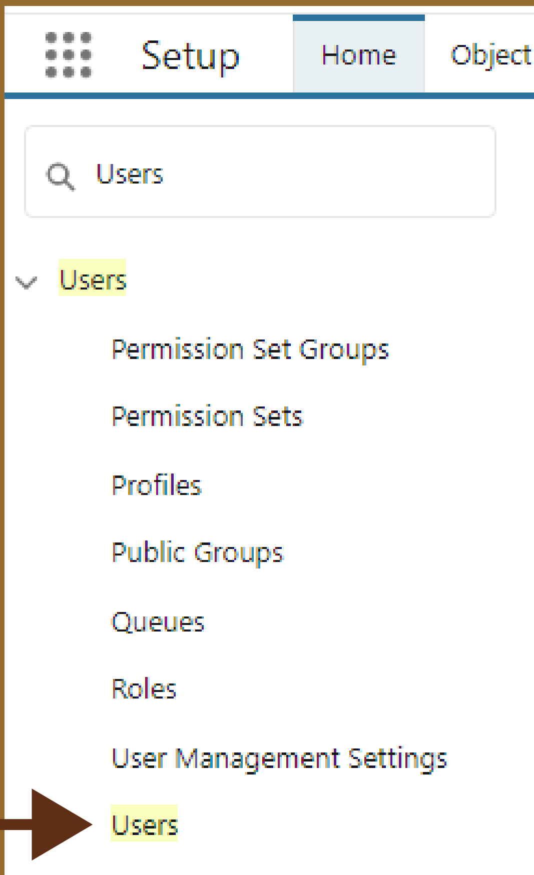
- Next, select Create, then select Custom object. Then fill in all the required details for your object and select save



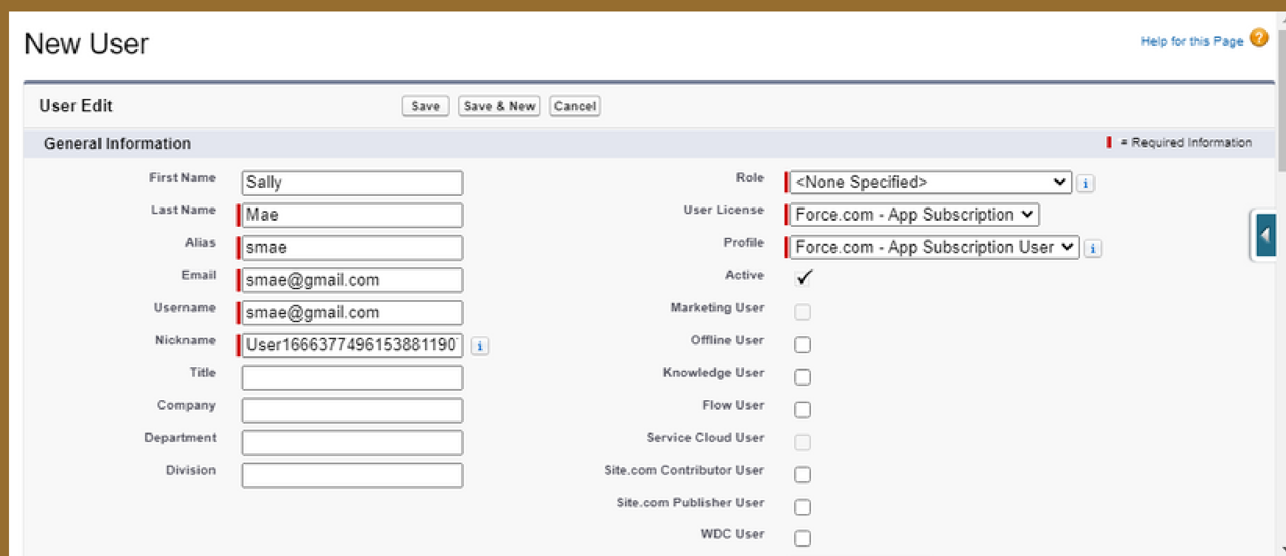
CREATING A USER

INSTRUCTIONS

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



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


New User
Help for this Page
User Edit
Save | Save & New | Cancel
General Information
= Required Information

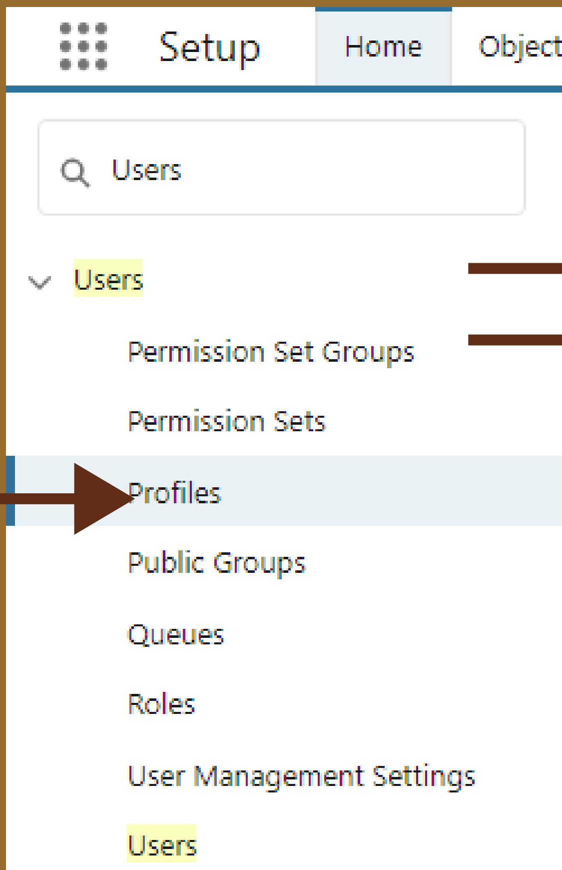
First Name	Sally	Role	<None Specified>
Last Name	Mae	User License	Force.com - App Subscription
Alias	smae	Profile	Force.com - App Subscription User
Email	smae@gmail.com	Active	✓
Username	smae@gmail.com	Marketing User	
Nickname	User1666377496153881190	Offline User	
Title		Knowledge User	
Company		Flow User	
Department		Service Cloud User	
Division		Site.com Contributor User	
		Site.com Publisher User	
		WDC User	

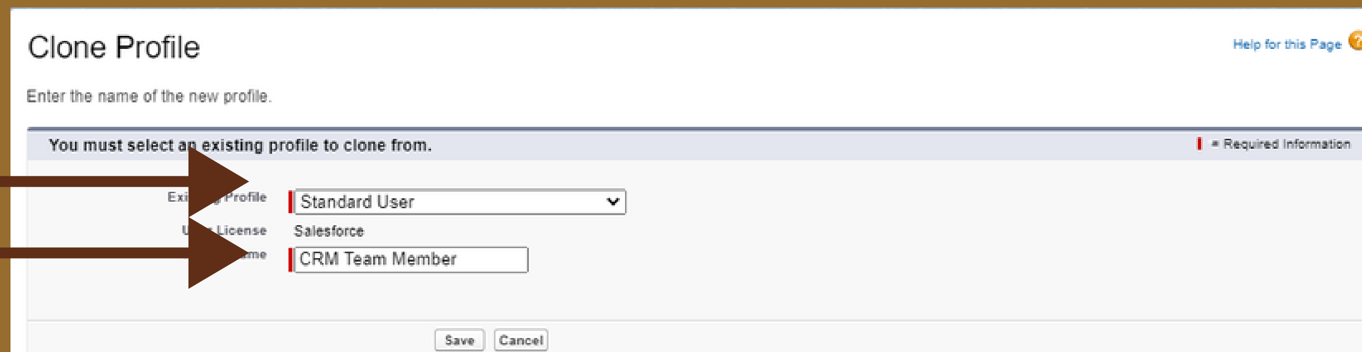
CREATING DIFFERENT PROFILES

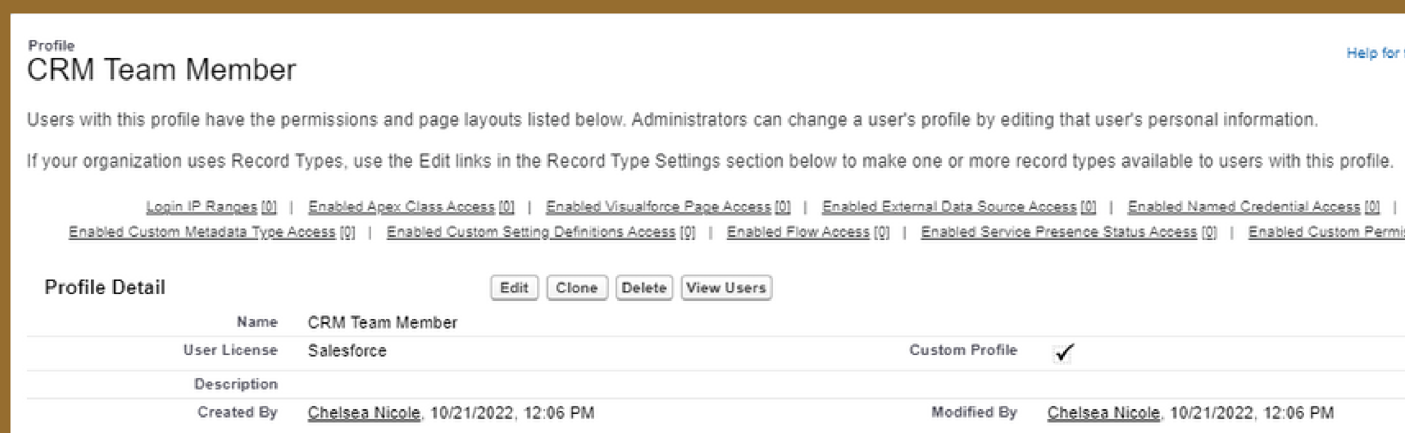
INSTRUCTIONS

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*



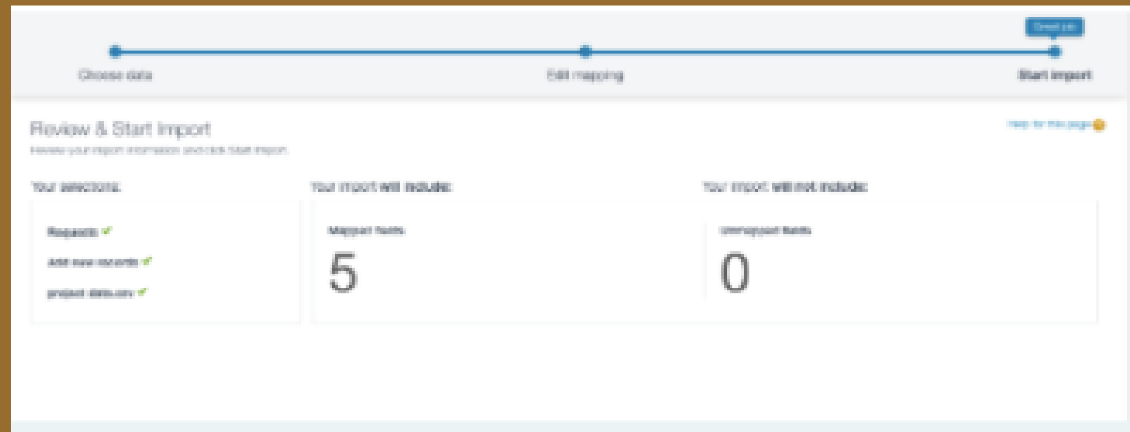




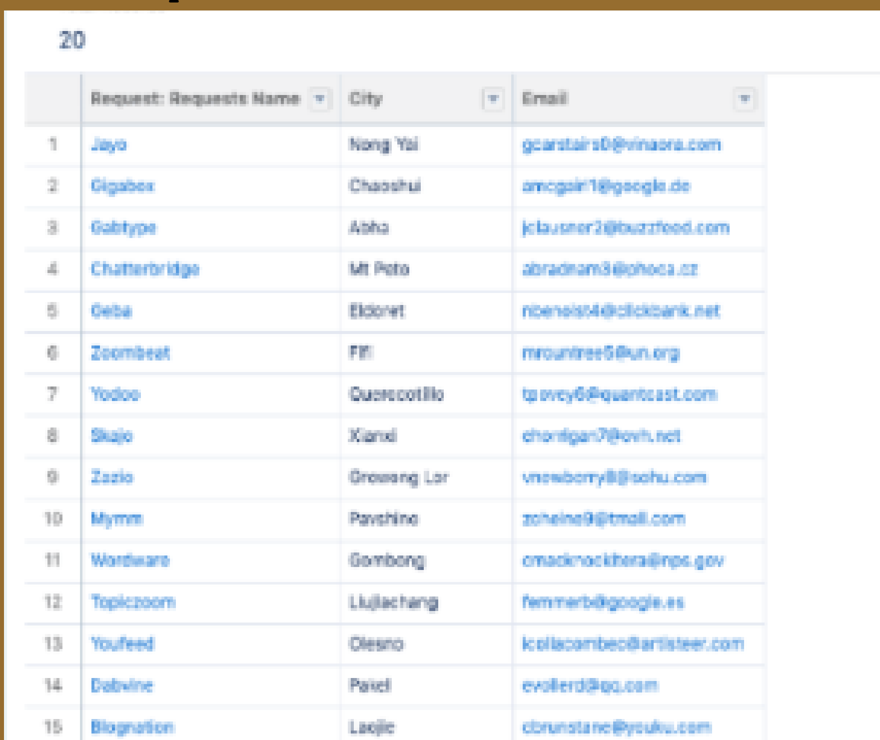
IMPORTING DATA

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.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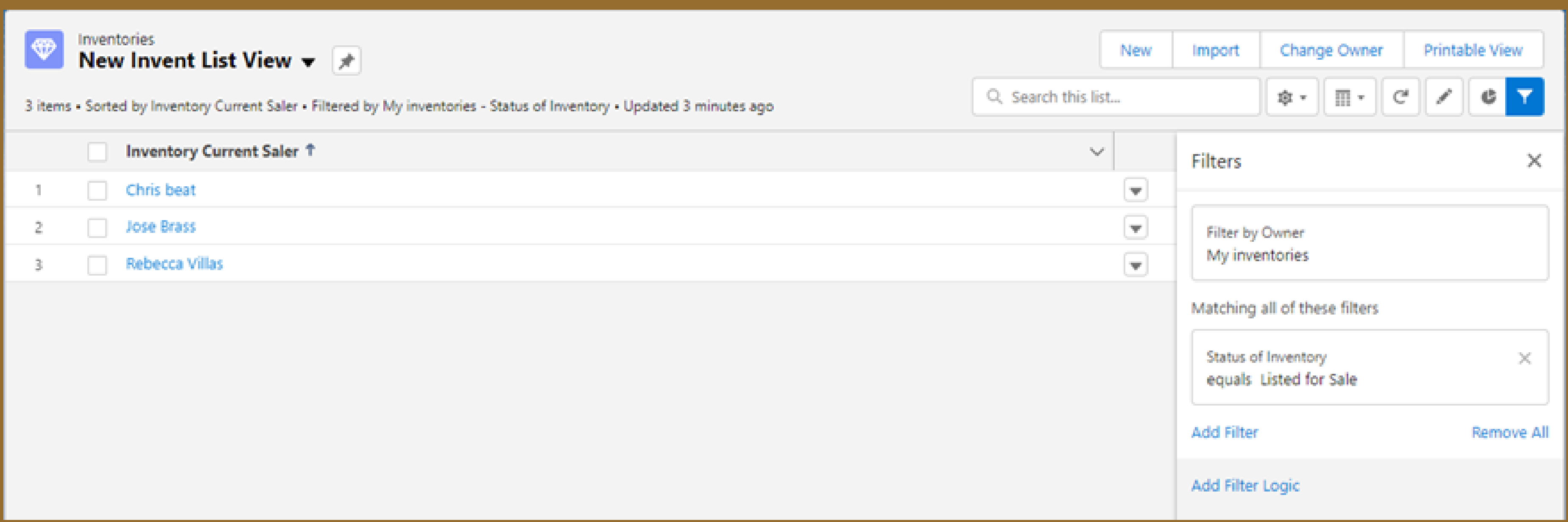
	Request: Requests Name	City	Email
1	Jayo	Nong Yai	gcarstairs0@vinaora.com
2	Gigabox	Chaoshui	amcgairl1@google.de
3	Gabtype	Abha	jclausner2@buzzfeed.com
4	Chatterbridge	Mt Poto	abradnam3@phoca.cz
5	Geba	Eldoret	nbenoist4@clickbank.net
6	Zoombeat	Fifi	mrountree5@un.org
7	Yodoo	Quezocotillo	tpovey6@quantcast.com
8	Skajo	Xianxi	chorrigan7@ovh.net
9	Zazio	Groswang Lor	vnewberry8@sohu.com
10	Mymm	Pavshino	zcheine9@tmall.com
11	Wordware	Gombong	cmacknockhera@nps.gov
12	Topiczoom	Liujiachang	femmerb@google.es
13	Youfeed	Olesno	kcollacombec@artisteer.com
14	Dabvine	Paizi	evollerd@qq.com
15	Blognation	Laojie	cbrunstane@youku.com

CREATING AND CUSTOMIZING A LIST VIEW

INSTRUCTIONS

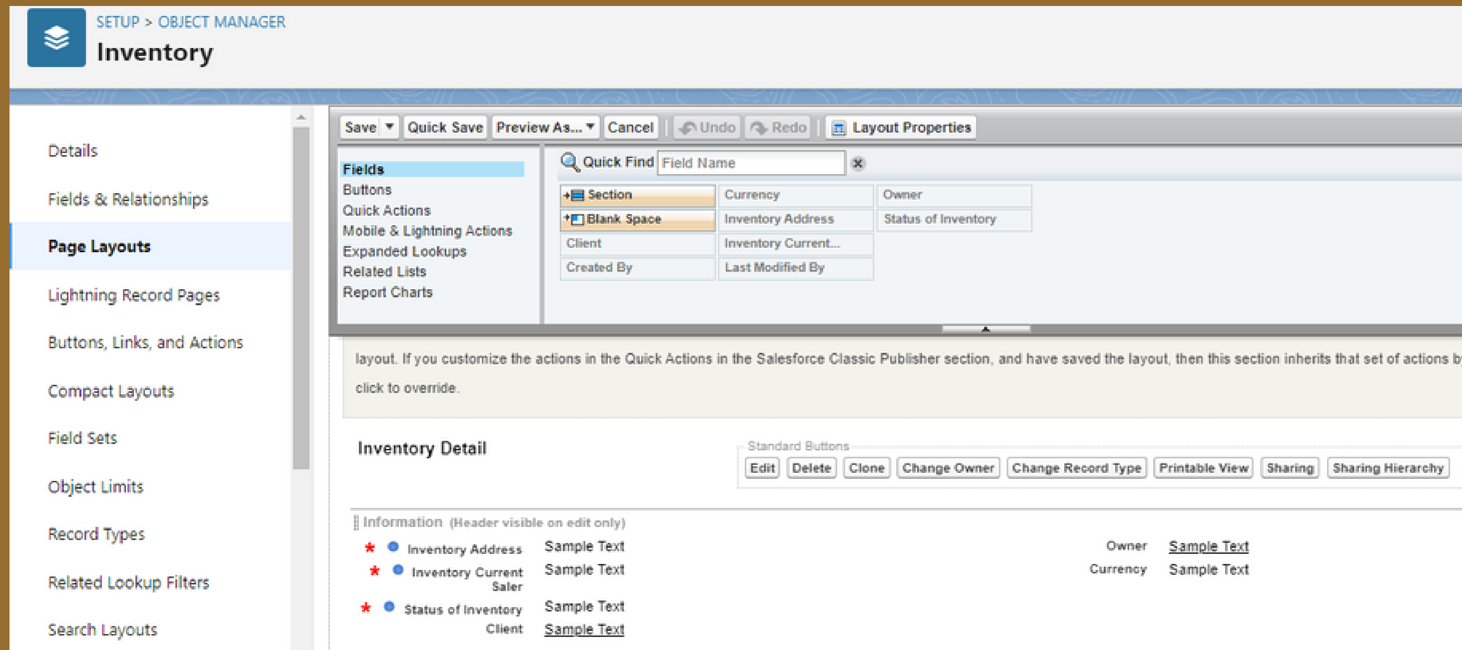
1. Click *Create New* at the top of a *List Page.*
2. Enter the *View Name.*
3. Enter the *Unique View Name.*
4. Specify the *Filter Criteria.*
5. Select the *Fields* you want to display on the *List View.*
6. Select *Save.*



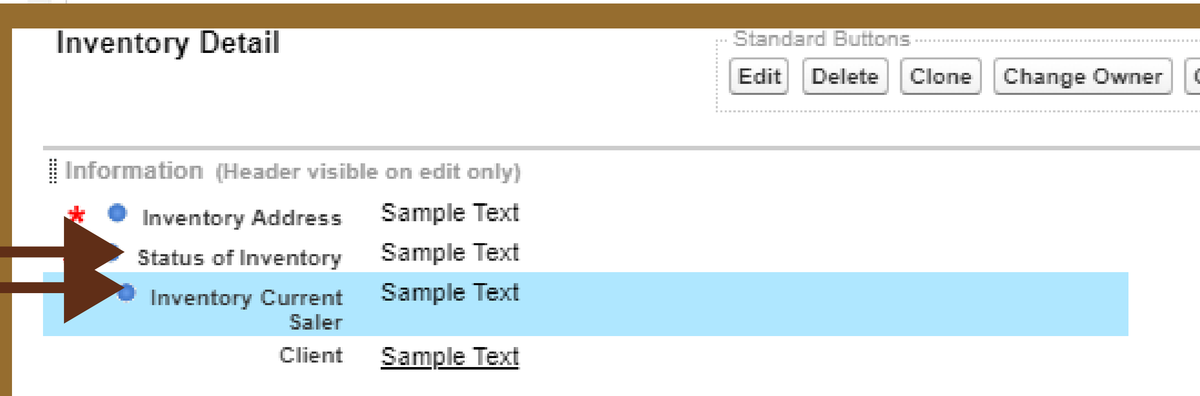
CUSTOMIZING AN OBJECT PAGE LAYOUT

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.



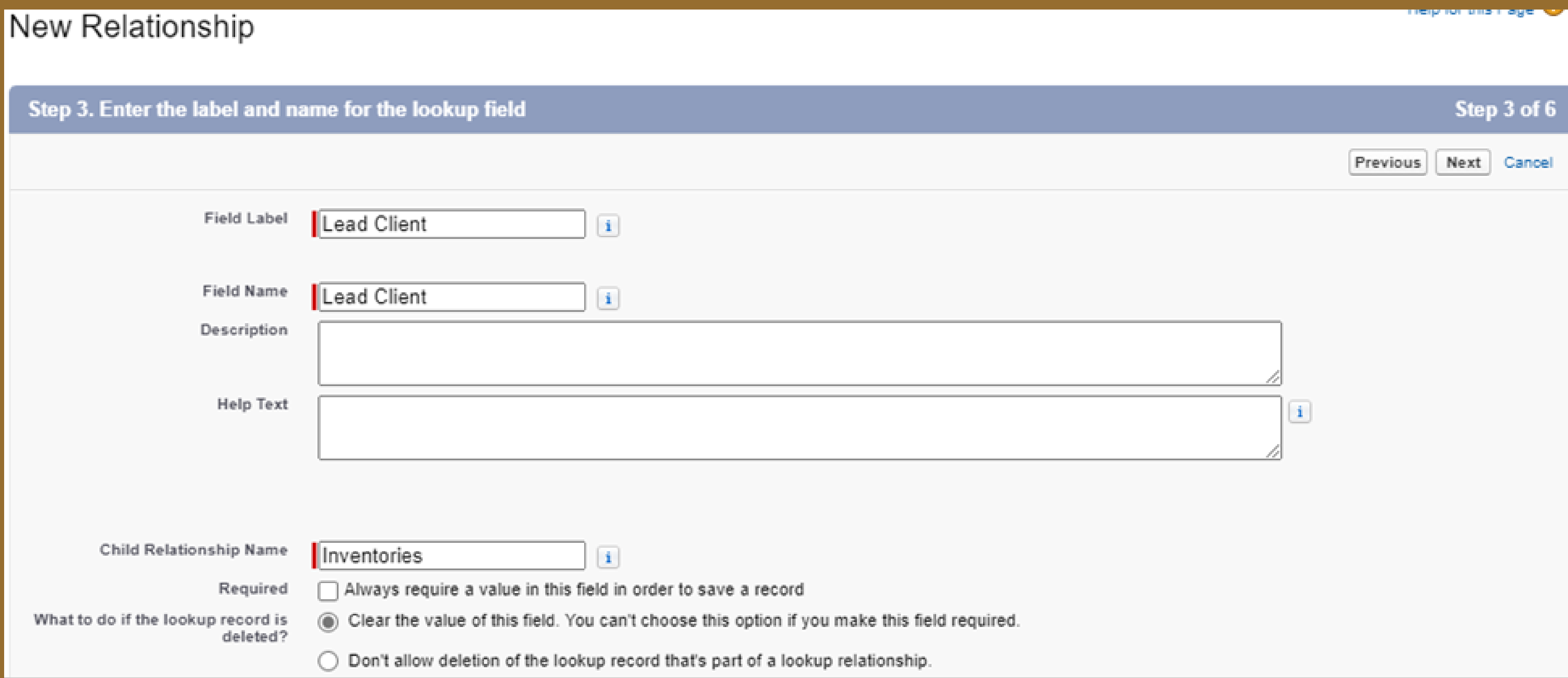
In the photos above I have customized the page layout by rearranging the fields into a different order.

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

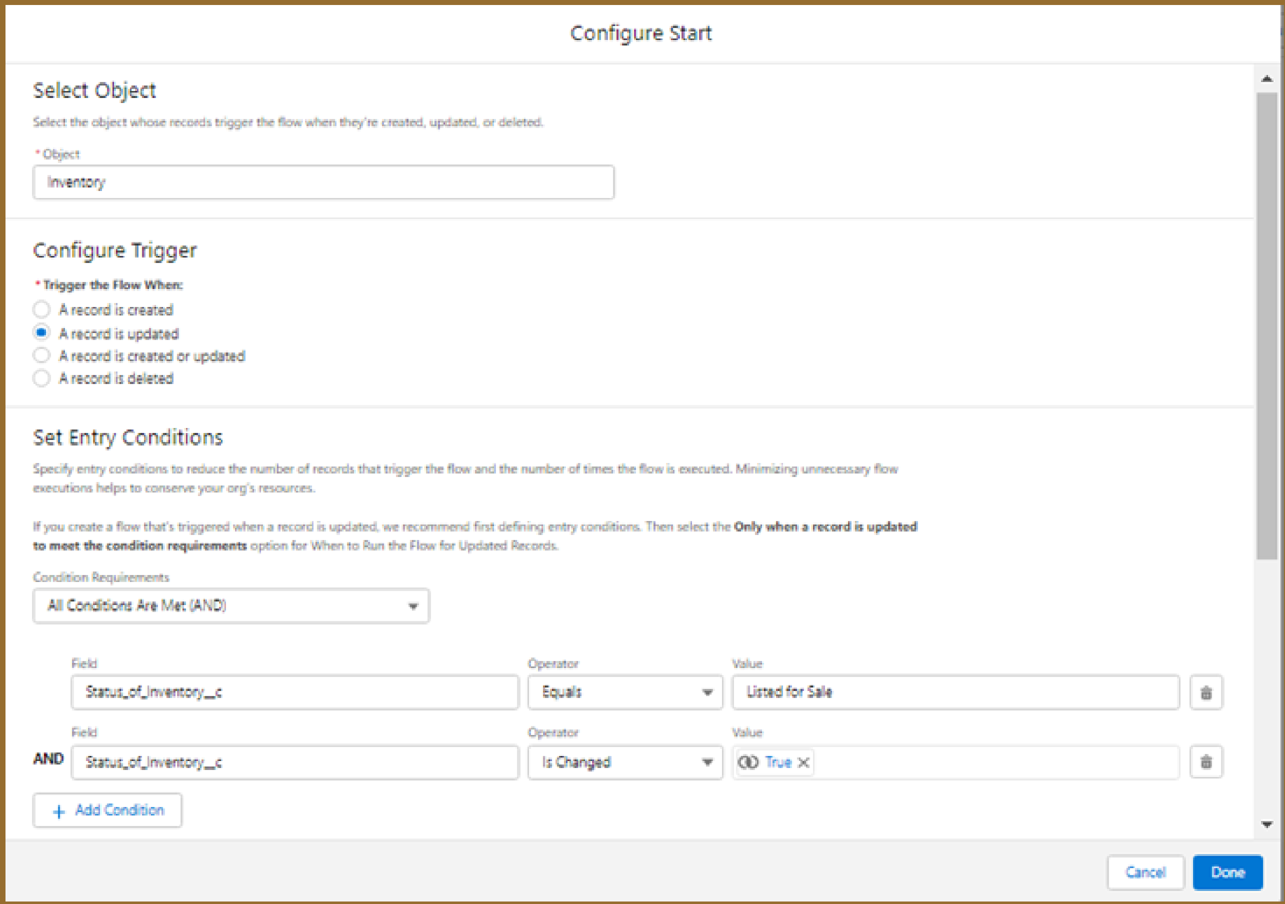


CREATING A FLOW

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

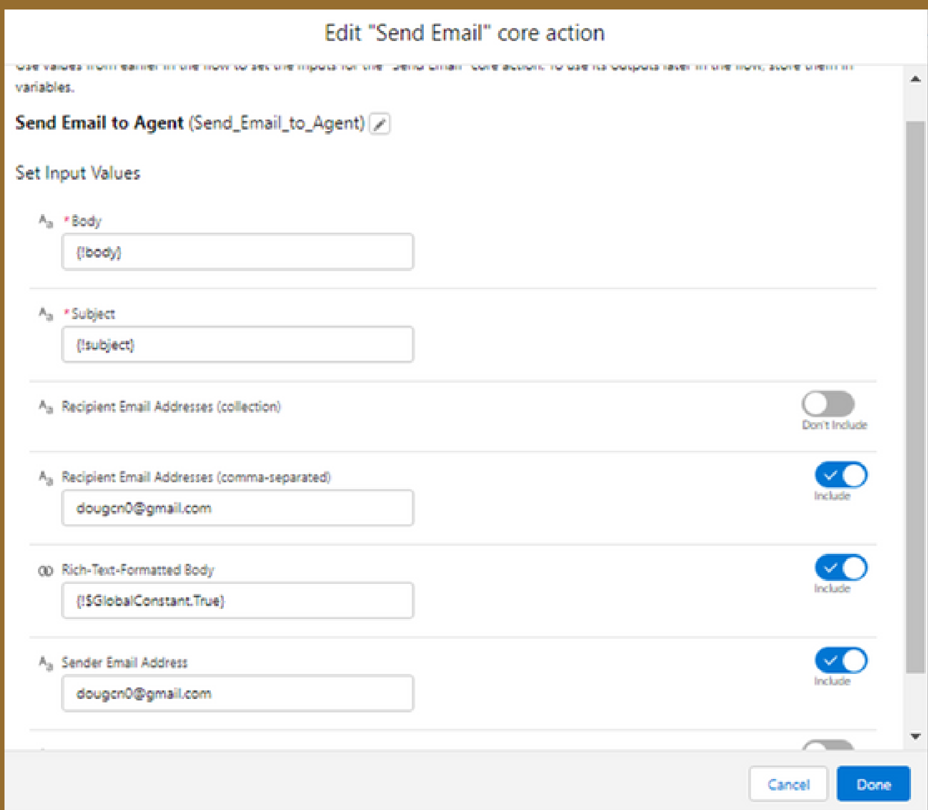
- **Setup > Search "Flows" > Select *"New Flow"* > Choose *"Record-Triggered Flow"* > Select the *Object* > Configure the Trigger > Set the Conditions > Click *Done***



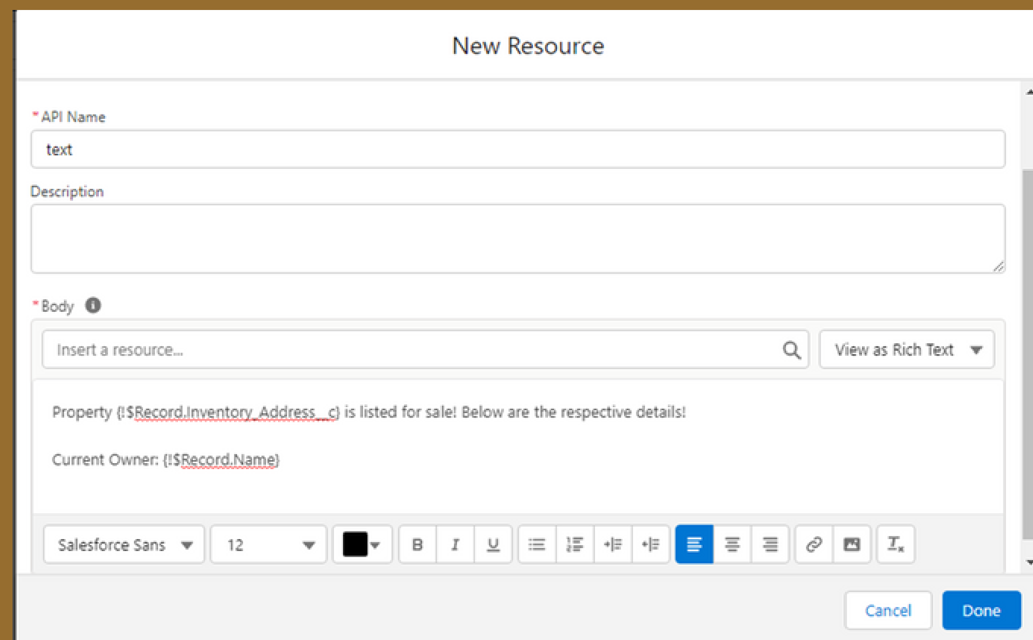
CREATING A FLOW

INSTRUCTIONS

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



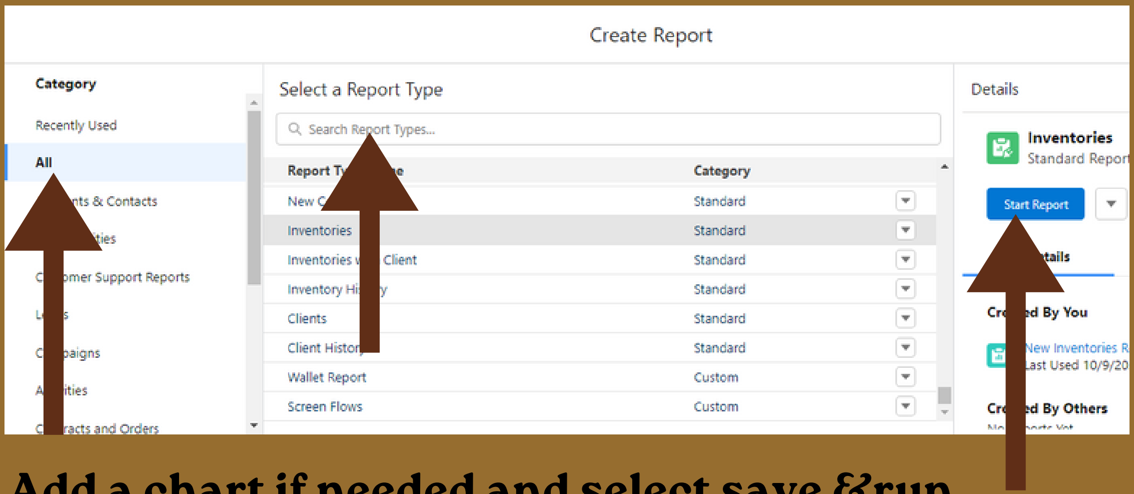
- Next save the flow. Then click “activate". To check the flow, I went to a record on the inventory object and updated the record to “Listed for sale” and the email sent successfully.



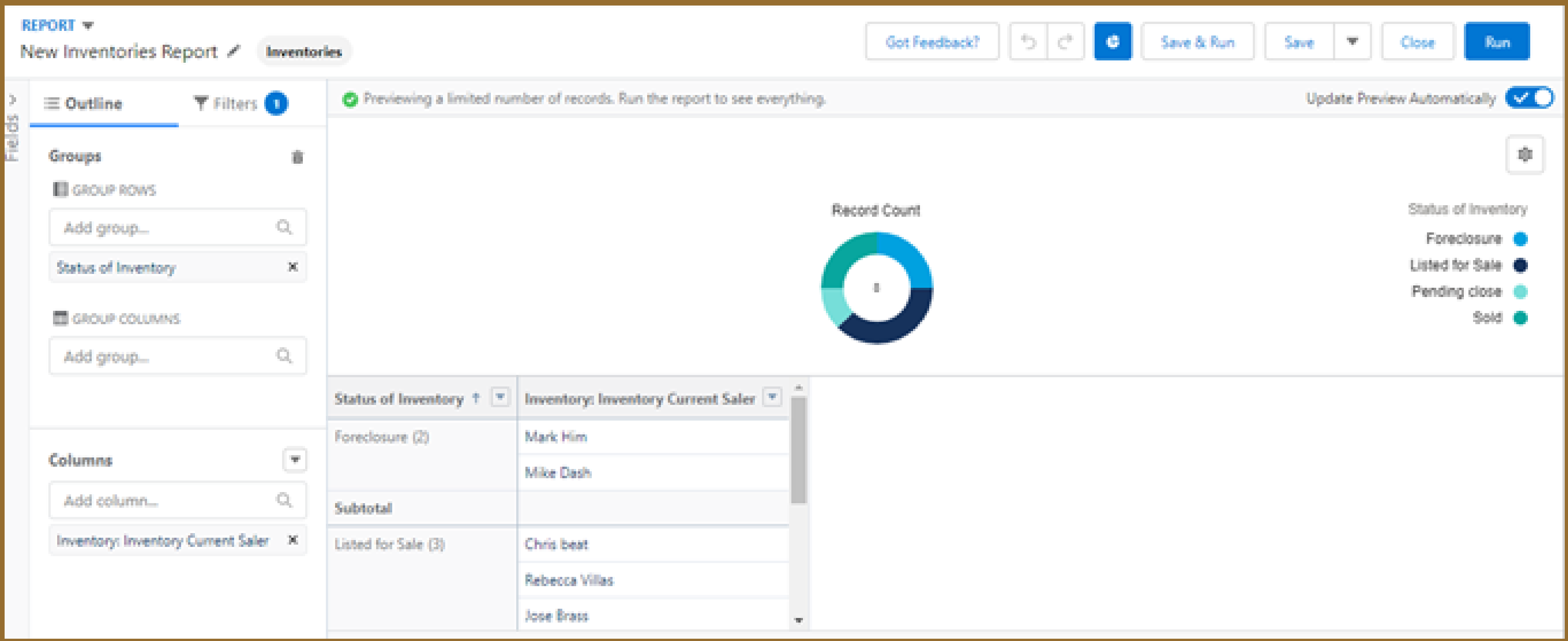
CREATING A REPORT

INSTRUCTIONS

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



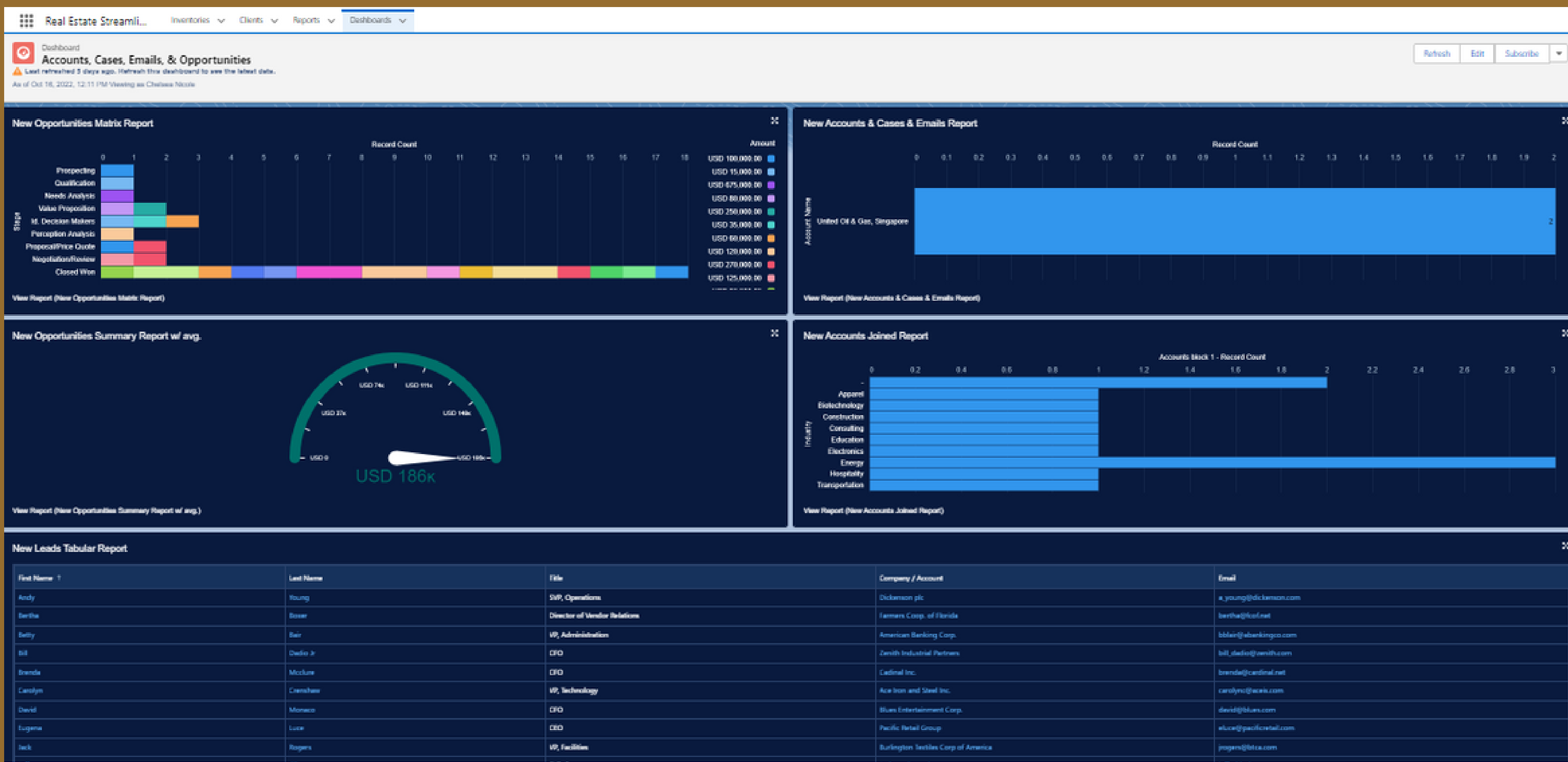
- Specify your groups and columns. Add a chart if needed and select save &run. The below report shows the properties that are listed for sale, pending sale, sold, etc. as well as its sellers. This allows clients to see first-hand what is on the market and available to them.



CREATING A DASHBOARD

INSTRUCTIONS

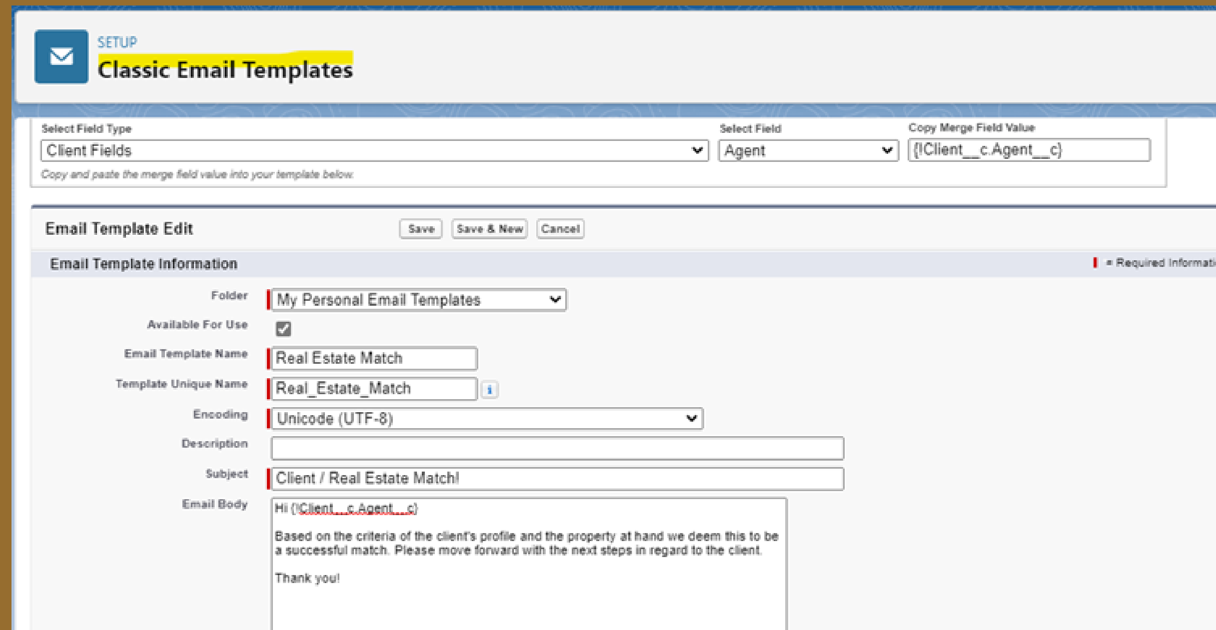
- After building your Inventory Report, go to the Dashboard tab >> select New >> apply the graphs that will offer the best results for your organization.



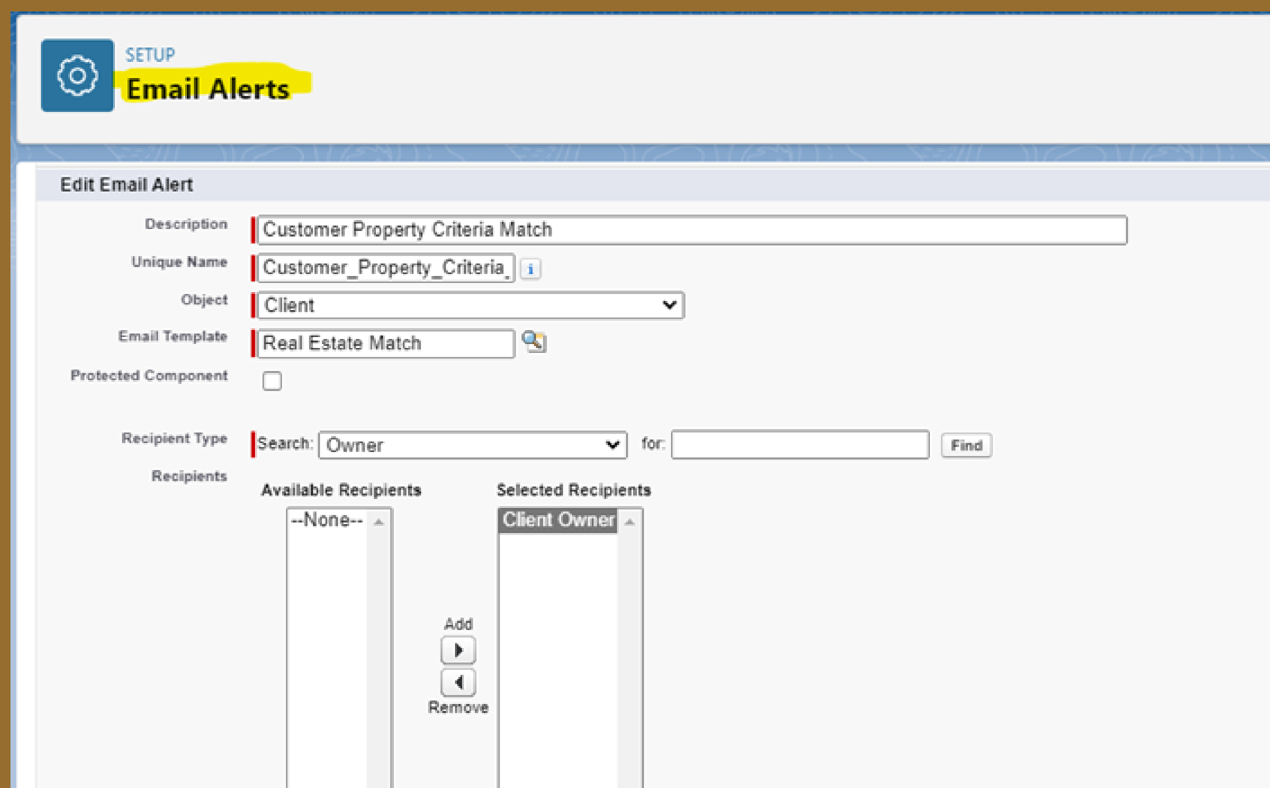
CREATING AN EMAIL NOTIFICATION

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



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



THANK YOU

Chelsea Douglas