Smart Property Portal

Project Title : Title:Smart Property Portal – Real Estate Customer Engagement & Lead Conversion System

Project Overview:

The *Smart Property Portal* is a Salesforce-based CRM solution designed for the real estate industry. It addresses the challenge of managing customer inquiries, property inventories, and sales cycles in an efficient and automated manner. The CRM focuses on improving lead capture, faster response times, property visit scheduling, and automated deal tracking. By streamlining these processes, it enhances customer engagement and supports management with performance dashboards and reports. Key features include automated lead assignment, property inventory visibility, approval workflows for deal closures, and mobile-friendly dashboards.

Objectives:

The main objective of building this CRM is to simplify and accelerate the real estate sales cycle through automation and intelligent workflows. The system aims to ensure faster lead follow-ups, efficient property management, and transparent deal closures. From a business perspective, this delivers better customer management, increased conversion rates, reduced manual errors, and data-driven decision-making. Additionally, dashboards and reports empower management to track agent performance and align sales strategies with organizational goals.

Phase 1 : Problem Understanding & Industry Analysis :

Requirement Gathering

- Collect requirements from property managers, sales agents, and buyers.
- Key needs: automated lead capture, property inventory management, visit scheduling, dashboards.

Stakeholder Analysis

- **Sales Agents** → Need quick lead assignment & follow-up tracking.
- **Property Managers** → Need property inventory visibility & visit scheduling.

- **Management** ⟶ Need reports & dashboards for performance tracking.
- **Buyers** ⟶ Need timely responses, visit confirmations, and transparent process.

Business Process Mapping

- Current: Leads from multiple sources ⟶ Manual entry ⟶ Delays in assignment ⟶ Poor conversion.
- Future: Leads auto-captured ⟶ Auto-assigned ⟶ Visits scheduled ⟶ Deal closure recorded in Salesforce.

Industry-specific Use Case Analysis

- Real estate industry depends heavily on fast response and personalized follow-ups.
- CRM ensures better buyer engagement and higher conversion rates.

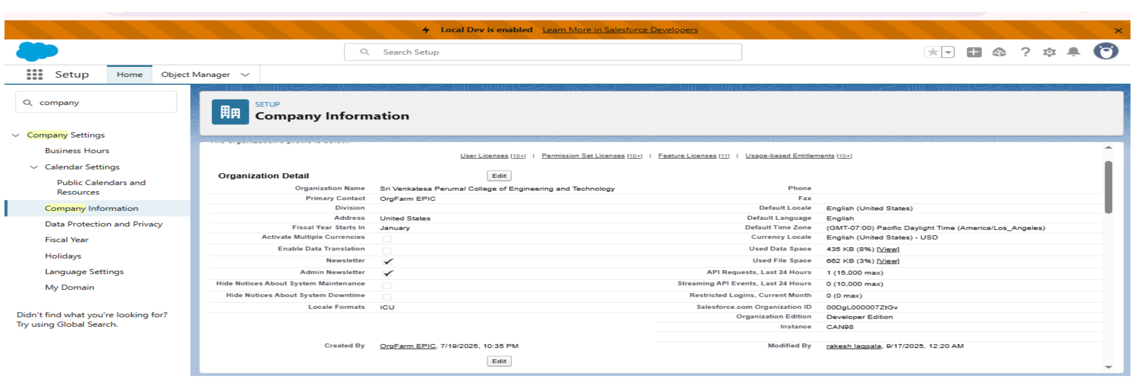
AppExchange Exploration

- Explore Property Management apps (PropertyBase, AscendixRE) for future scaling.
- For MVP, custom Salesforce objects are sufficient.

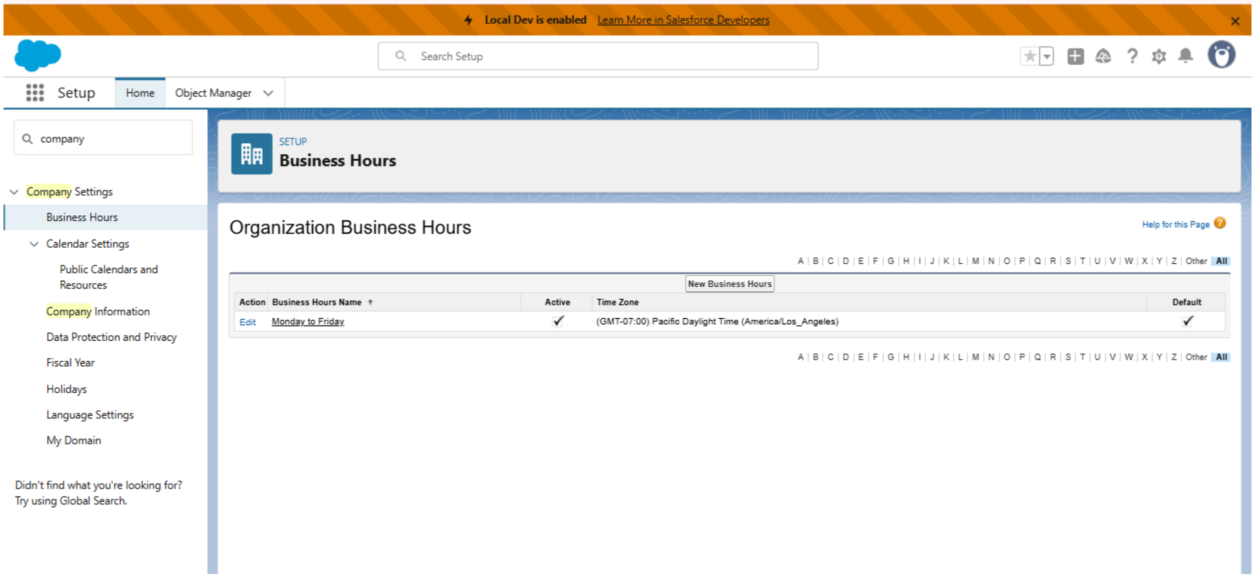
Phase 2: Org Setup & Configuration :

1. **Salesforce Edition**
   For this project, we're using the **Developer Edition**. It's free but has almost all the features of the Enterprise Edition, so it's perfect for practice and building real-world CRM projects.

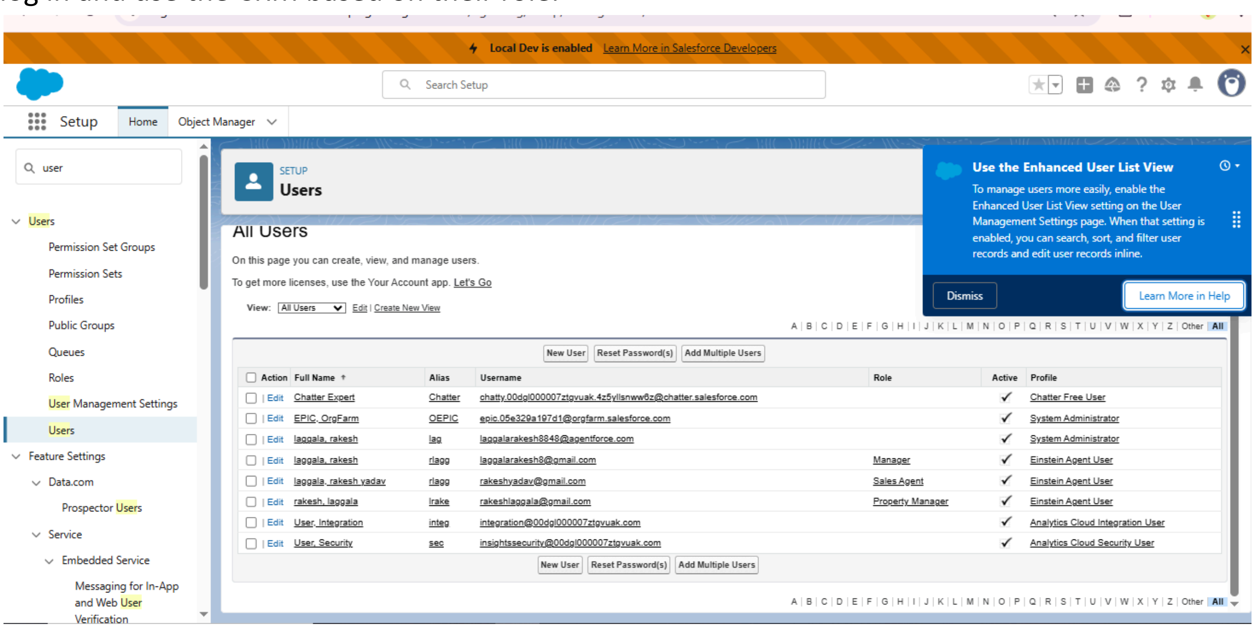
2. **Company Profile Setup**
   Here, we set up the company's details, like time zone, currency, and fiscal year. Since most Indian businesses follow **April to March** as their financial year, we set the same in Salesforce. This way, all reports and sales tracking will match the business cycle.



3. **Business Hours & Holidays**
We defined the official working hours as **10 AM to 7 PM, Monday to Friday**, with weekends as holidays. This helps Salesforce understand when the team is working, so automation like reminders or SLA tracking doesn't run on non-working days.



4. **User Setup & Licenses**
We created different user accounts for people in the system—like **Admin, Sales Agents, and Property Managers**. Each user is given a Salesforce license, which allows them to log in and use the CRM based on their role.



5. **Roles & Profiles**

- **Roles** set the hierarchy: Manager at the top, then Property Manager, and finally Sales Agents. This controls what data they can see.

- **Profiles** decide what actions they can perform, like creating records, editing, or deleting. In short: Roles = *Who can see the data* and Profiles = *What actions they can do with it*.

6. **Permission Sets**
   Sometimes, users need extra access for specific tasks. For example, a Sales Agent normally can't create dashboards, but with a **Permission Set**, we can give them that ability without changing their whole profile.

7. **Org-Wide Defaults (OWD)**
   This is the baseline access level for everyone.

- Leads are set to **Private**, so only the owner and their manager can see them.

- Properties are **Public Read/Write**, meaning all agents can view and update them. This balance keeps sensitive data secure but allows collaboration where needed.

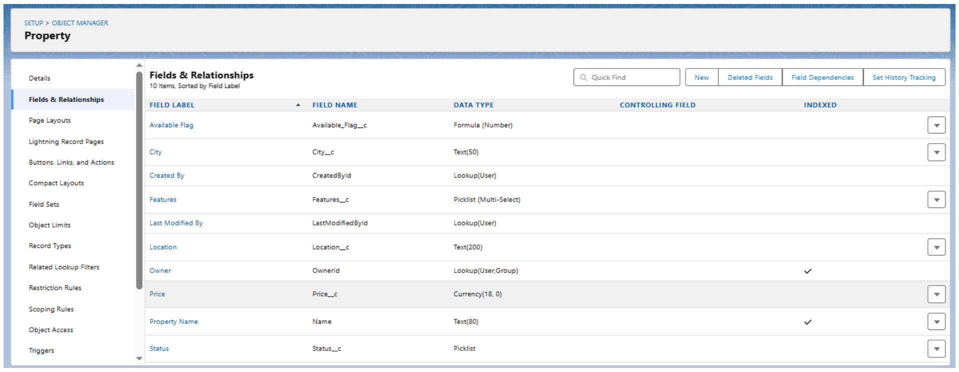
8. **Sharing Rules**
   Since Leads are private, we created **Sharing Rules** to allow agents in the same territory to share their leads with each other. This makes teamwork easier without exposing data to everyone.

Phase 3: Data Modeling & Relationships :

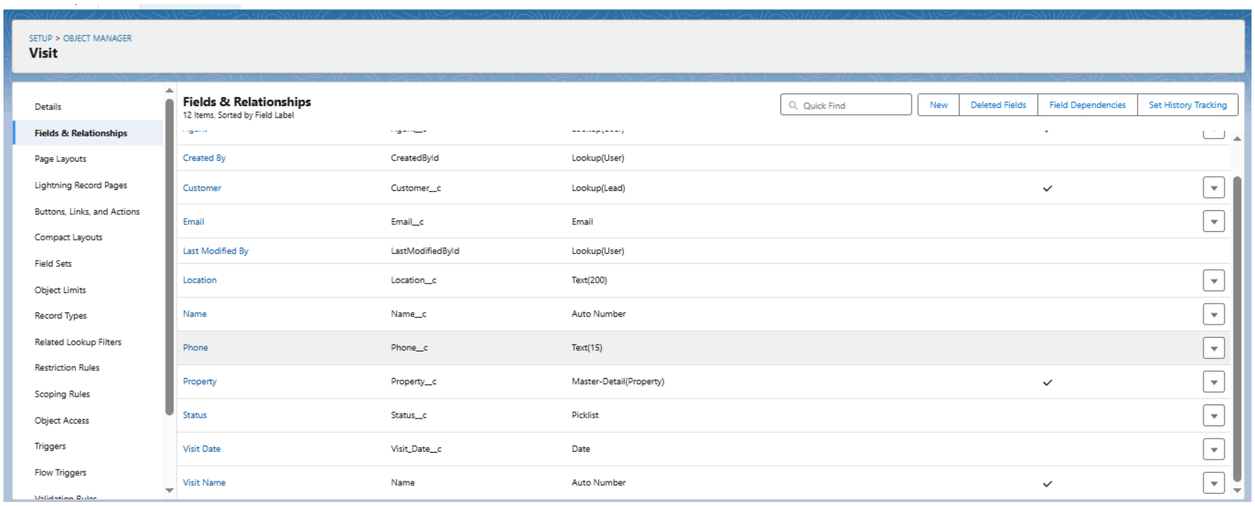
Objects and Fields

- **Lead (Standard):** Stores customer details like name, email, phone, source, interest score, and status. Used to capture potential buyers.

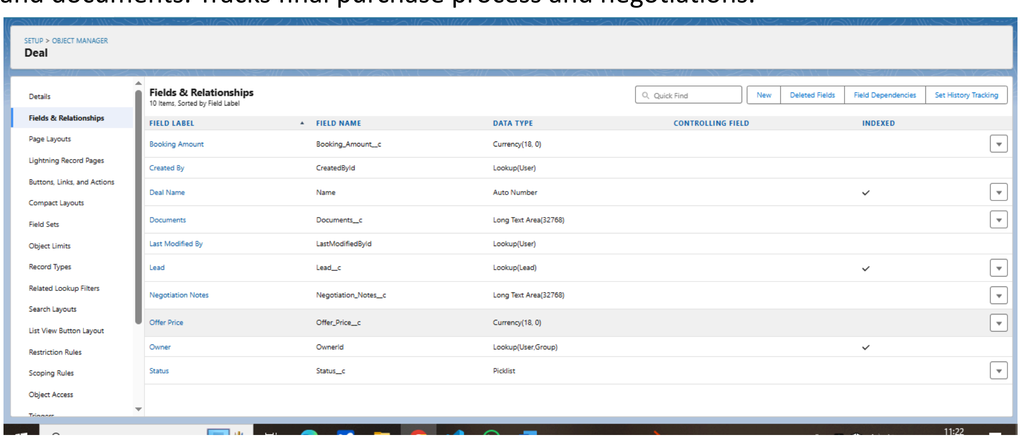
- **Property (Custom):** Keeps property details such as property name, location, price, status (available or sold), and features. Helps agents manage inventory.



- **Visit (Custom):** Records property visits with fields like visit date, customer, agent, property, and status. Used for scheduling and tracking property tours.



- **Deal (Custom):** Contains information like offer price, negotiation notes, status, booking amount, and documents. Tracks final purchase process and negotiations.

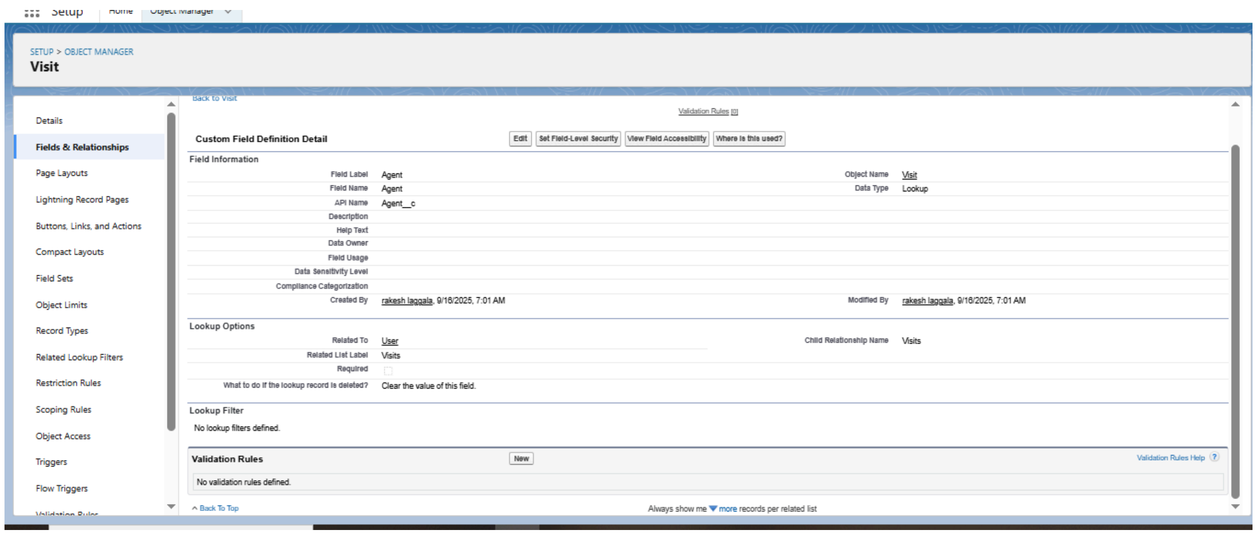


Relationships

- **Property and Visit (Master-Detail):** One property can have many visits. If a property is deleted, all its related visits are also deleted.

- **Lead and Deal (Lookup):** A lead can be linked to a deal if it converts. The deal references the original lead.

- **Agent and Visit (Lookup):** Each visit is linked to an agent. An agent can have multiple visits scheduled with different customers.



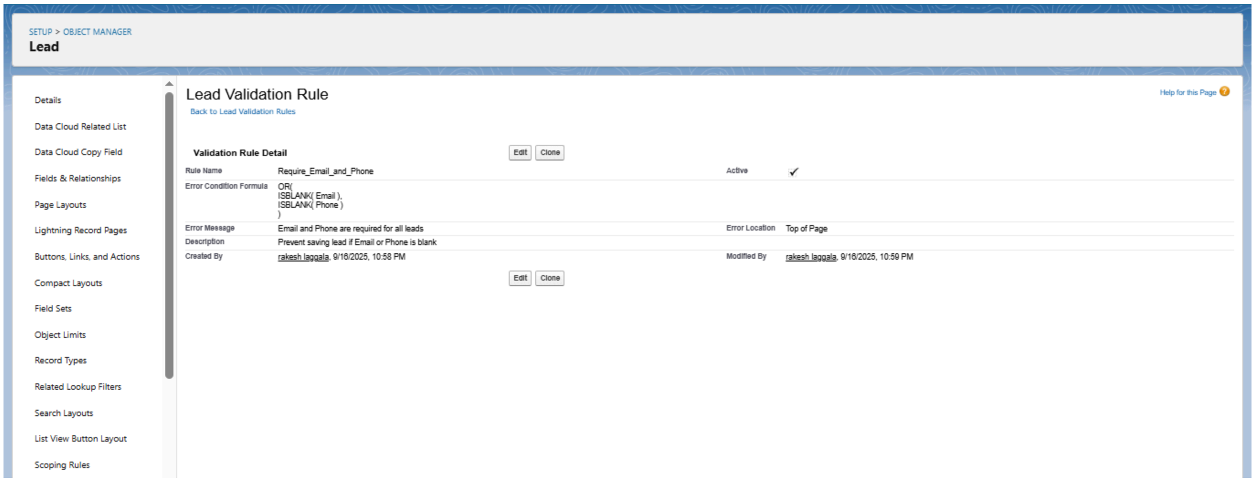
Schema Tools

- Schema Builder is used to create a visual diagram of all objects and their connections. It helps to clearly see how Leads, Properties, Visits, and Deals are related.

Phase 4: Process Automation (Admin) :

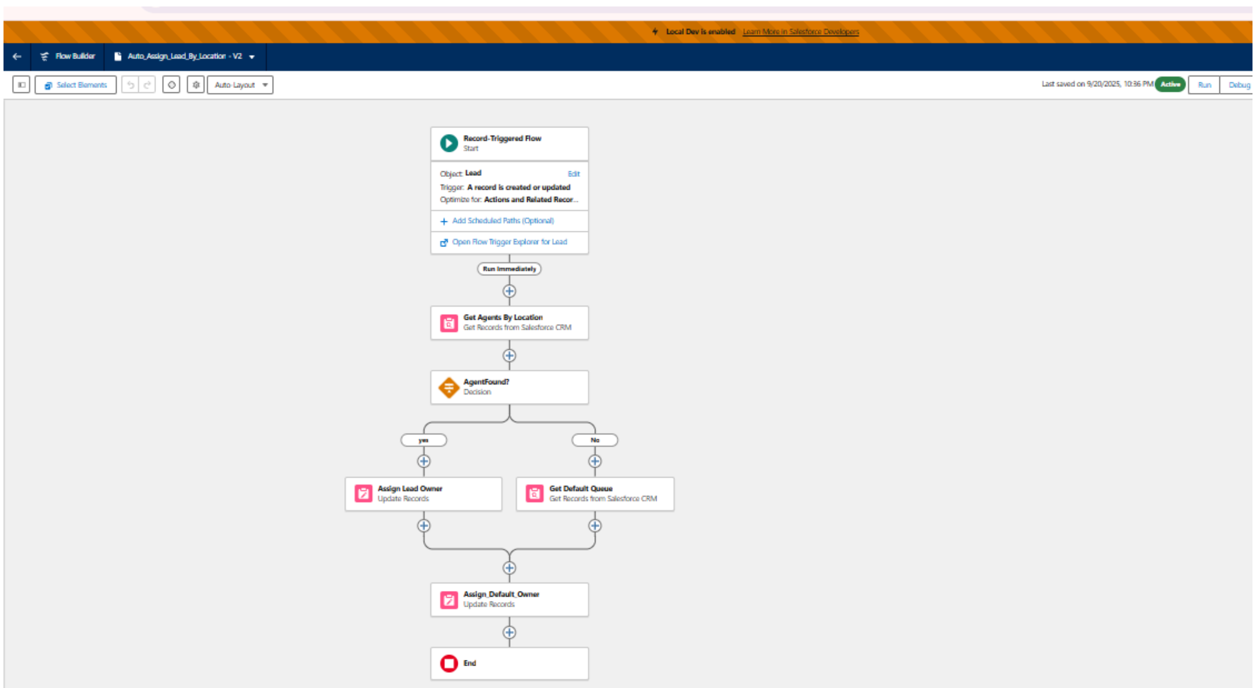
Validation Rules

We created validation rules to make sure important fields like email and phone are not left blank when adding a new lead. This prevents incomplete records from entering the system and ensures agents always have the basic contact details of a customer.



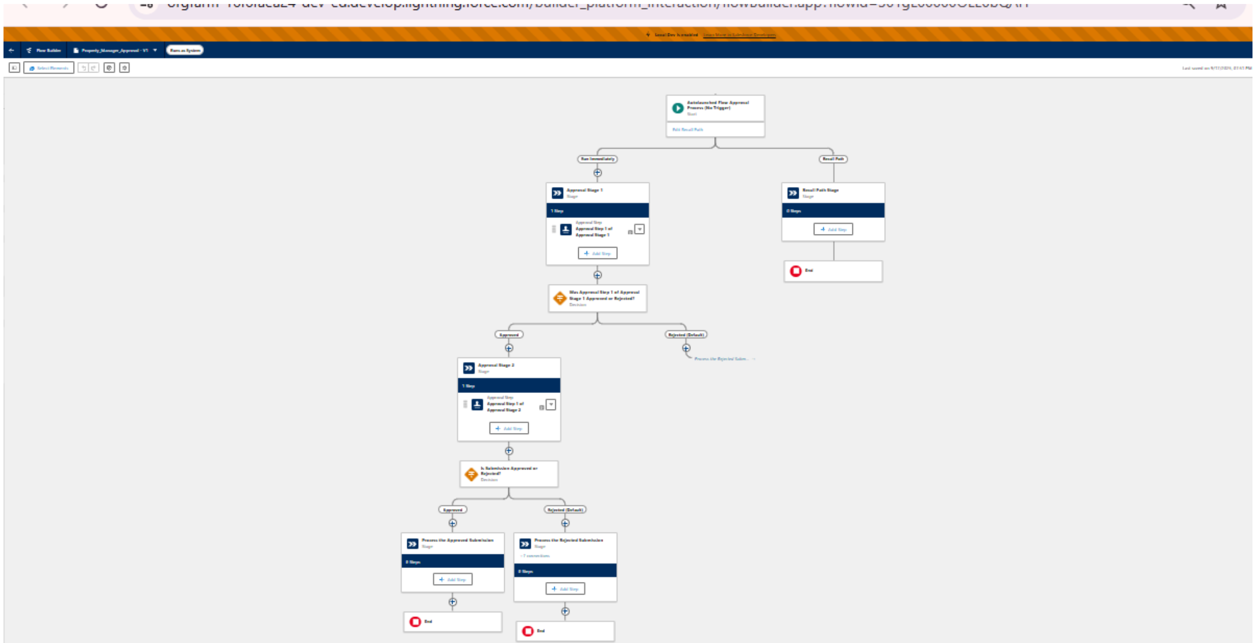
Flow Builder

Flows were designed to automatically assign leads to agents based on location. For example, if a lead is from Hyderabad, it goes directly to the Hyderabad sales agent. This saves time and ensures faster response to customer inquiries.



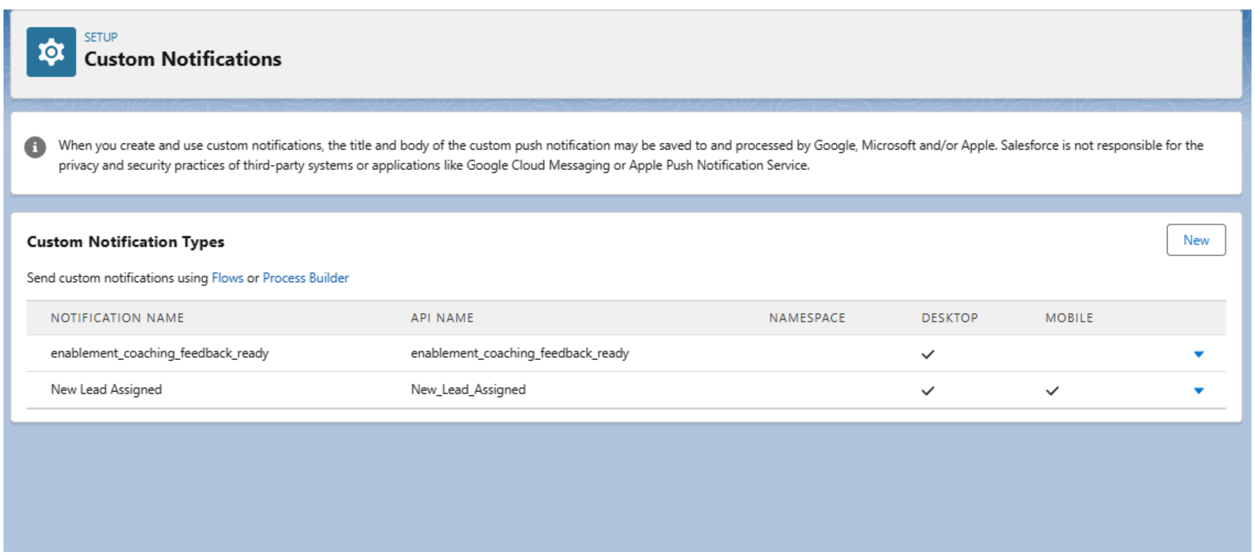
Approval Process

An approval process was set up for closing deals. Whenever a sales agent tries to mark a deal as closed, it first goes to the Property Manager for approval. This step ensures that only verified and authorized deals are finalized.



Custom Notifications

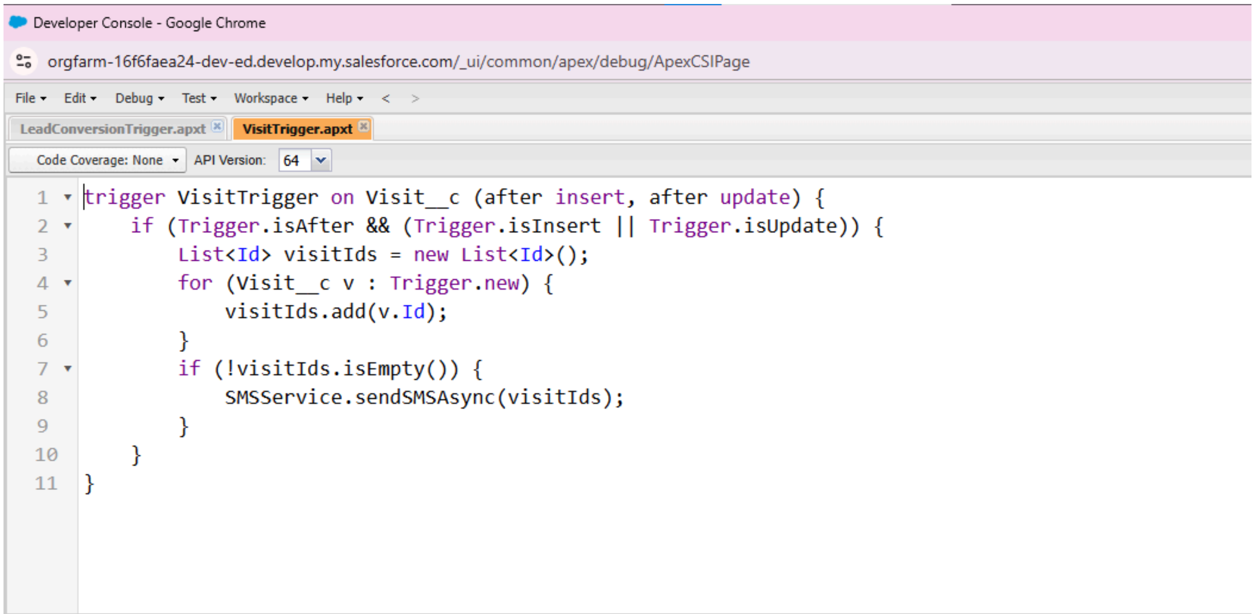
Custom notifications were built for sales agents. Whenever a new lead is assigned, the agent receives a notification inside Salesforce. This helps agents act quickly without missing new opportunities.



Phase 5: Apex Programming (Developer) :

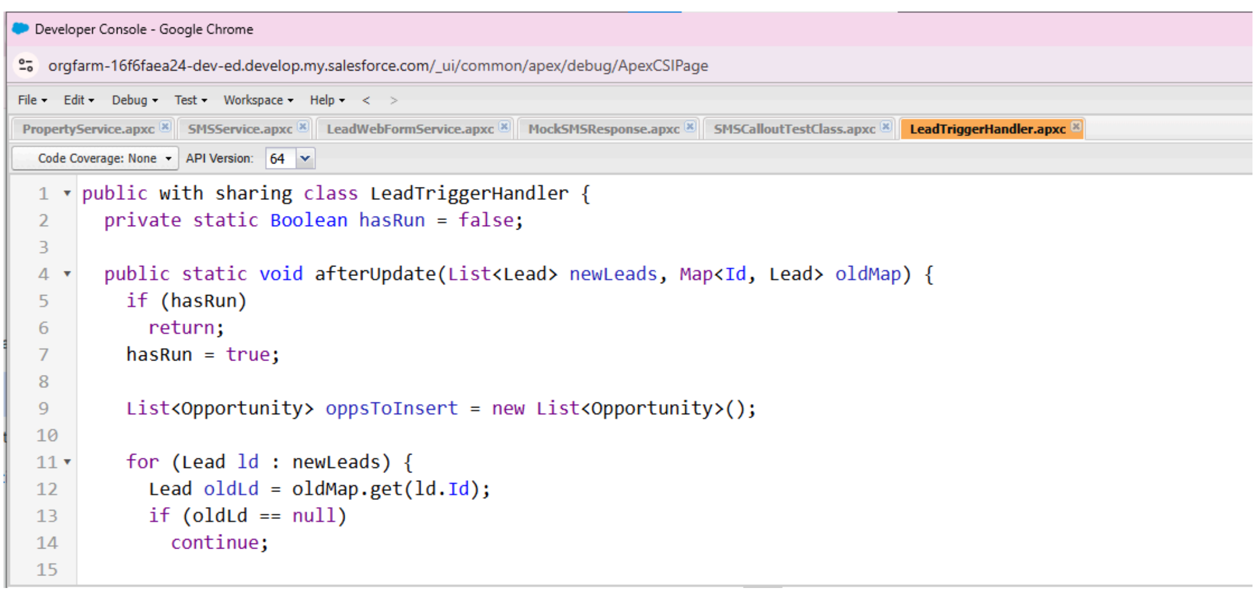
Apex Trigger

We created a trigger that runs when a lead is converted. As soon as conversion happens, the system automatically creates a related Account and Opportunity. This saves time for sales agents because they don’t need to manually create these records after every conversion.



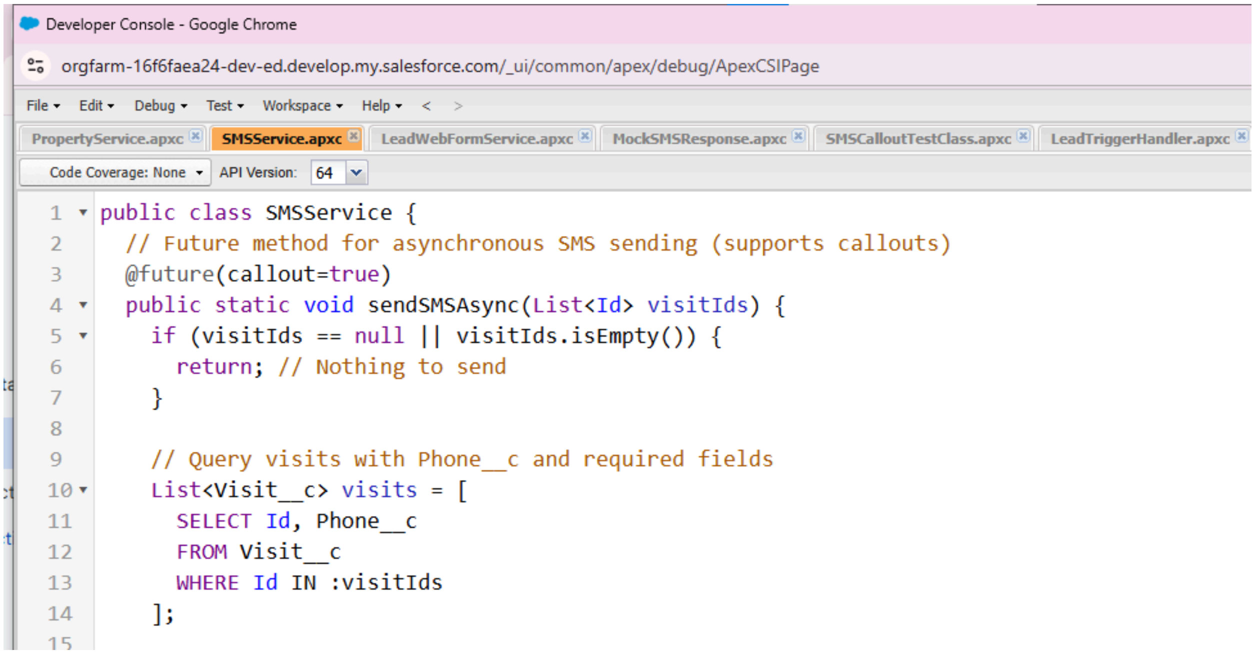
SOQL Queries

SOQL (Salesforce Object Query Language) was used to fetch property records based on filters like location and price. For example, if a customer asks for flats under 50 lakhs in Hyderabad, the query will quickly retrieve only those matching properties. This makes searching faster and more accurate.



Future Method

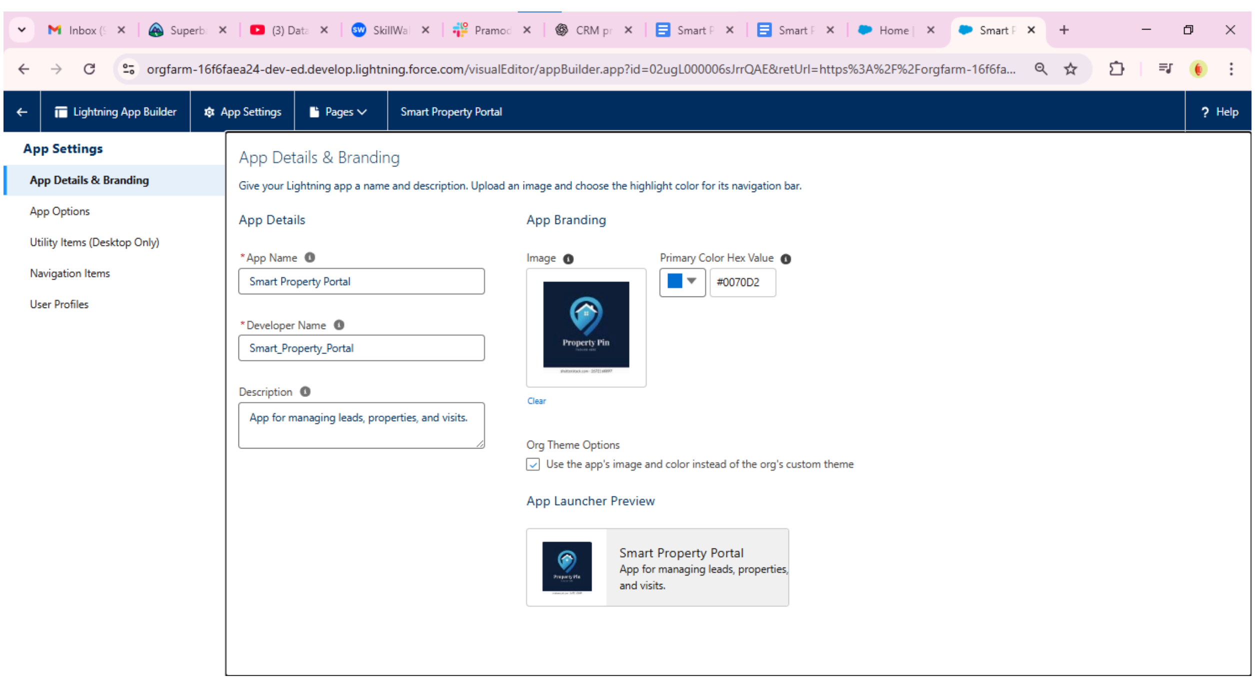
We used a future method to send SMS confirmations to customers after their property visit is scheduled. Since sending SMS is an external callout, it is better to run it asynchronously in the background. This keeps the system smooth and avoids delays in saving the record.



Phase 6: User Interface Development :

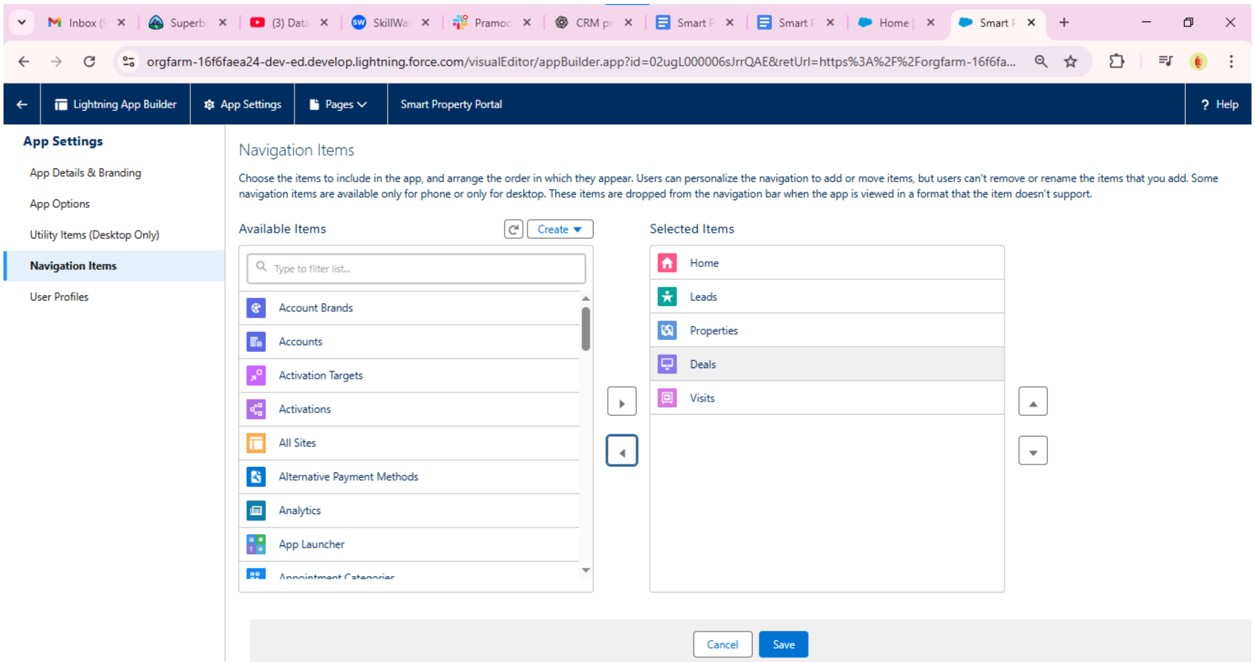
Lightning App Builder

We used Lightning App Builder to create a custom application called "Smart Property Portal." This app brings together all the objects, pages, and components in one place so that sales agents and managers can easily access everything they need without jumping around.



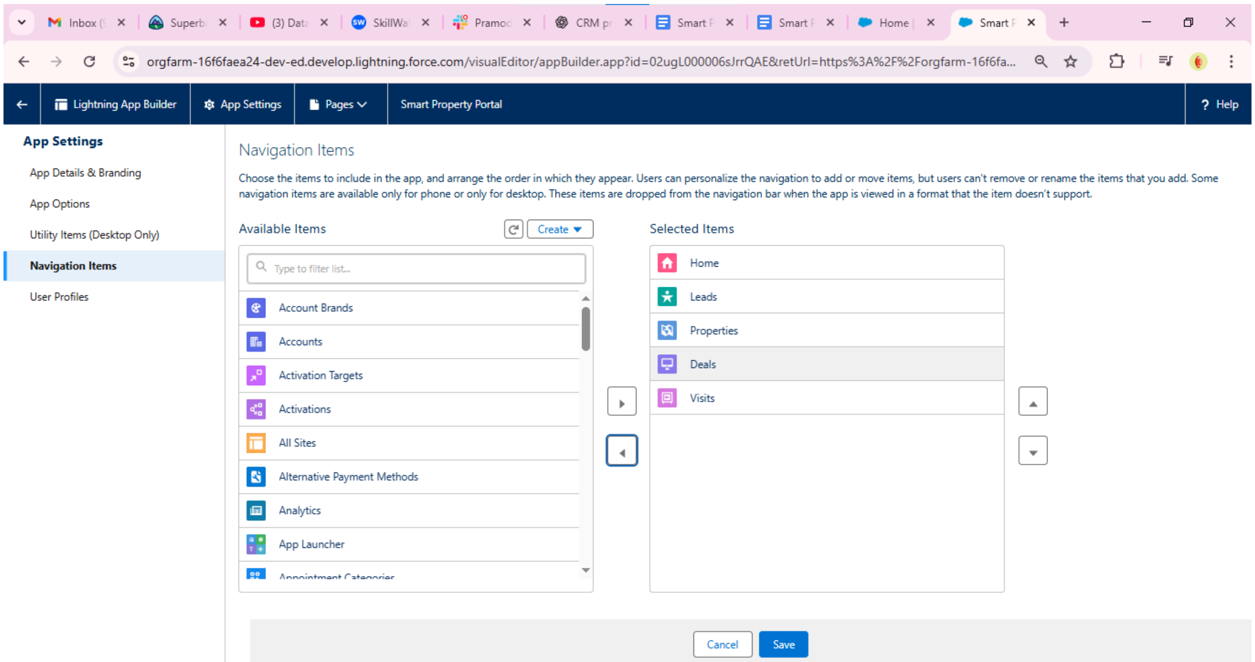
Record Pages

Custom record pages were designed for Leads, Properties, and Visits. Each page was arranged to show the most important details at the top and related information below. For example, the property page shows price, location, and availability clearly, making it easy for agents to check details quickly.



Tabs

We added tabs for Leads, Properties, Visits, and Deals in the navigation bar. This way, users can easily switch between different records. For instance, if an agent is working on a lead and wants to check available properties, they can move directly to the Property tab in just one click.

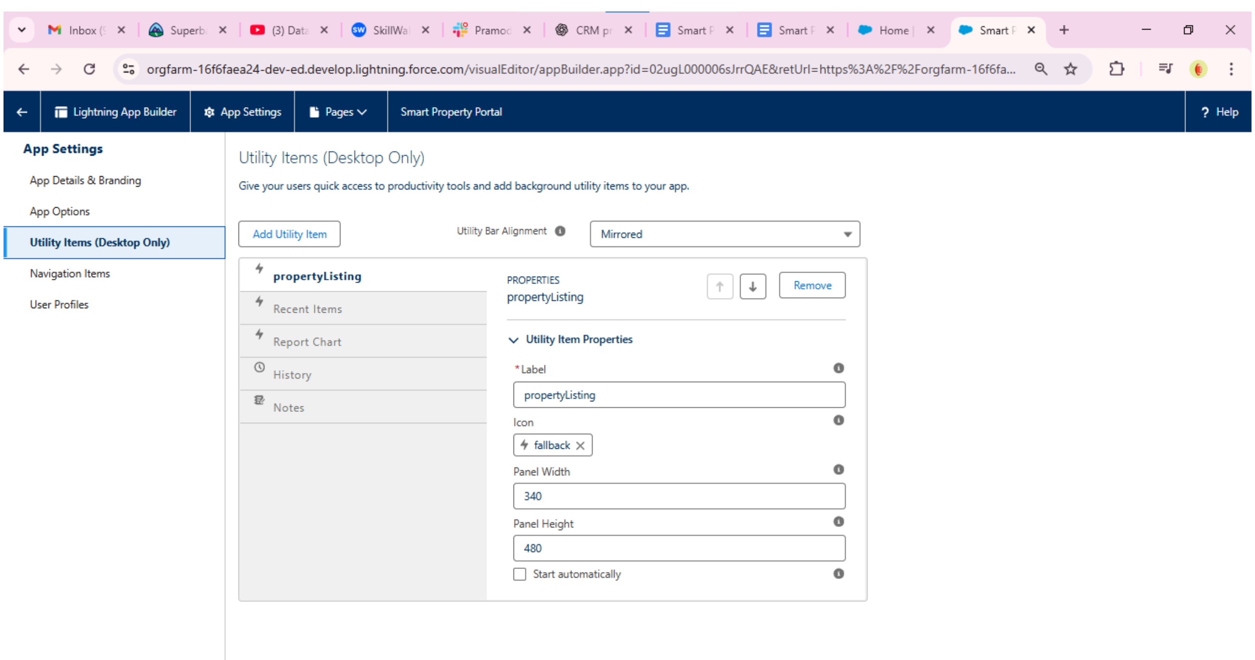


Home Page

A custom home page was built for sales agents. It includes a dashboard snapshot that shows their performance, upcoming visits, and new leads. This gives them a quick overview of their work as soon as they log in.

Utility Bar

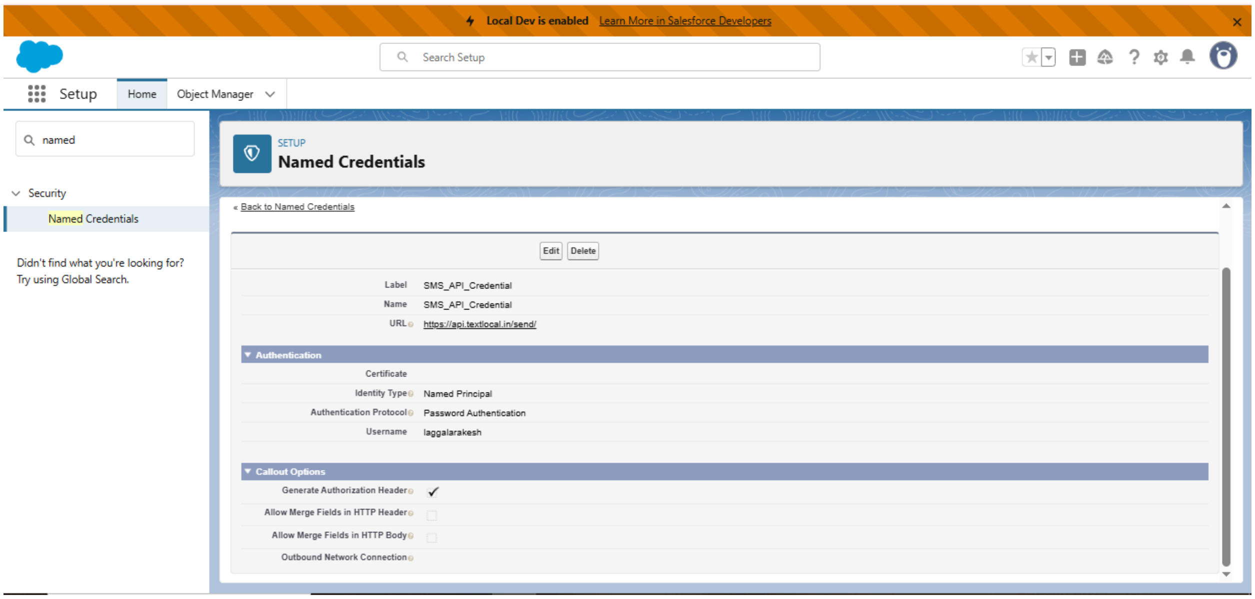
We added a utility bar at the bottom with a quick button to “Schedule Visit.” This makes it easy for agents to book a property visit directly from anywhere in the app without opening multiple pages.



Phase 7: Integration & External Access :

Named Credentials

We set up named credentials to securely store login details for external services like SMS and email APIs. This way, Salesforce doesn't need to hard-code usernames and passwords in the code. It makes integration more secure and easier to manage.

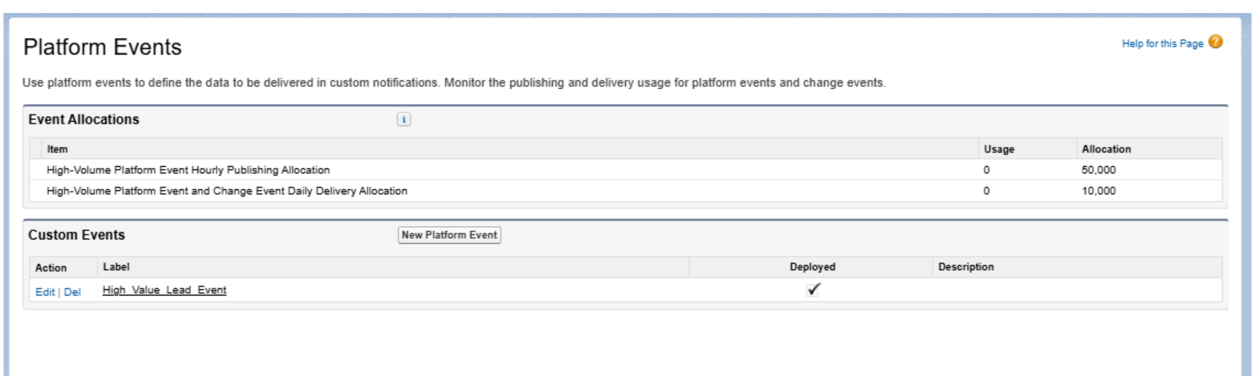


Web Services (REST)

We exposed a REST API endpoint so that leads can be created automatically from web forms. For example, if a customer fills out a property inquiry form on the company website, the data directly flows into Salesforce and creates a new lead. This reduces manual data entry and speeds up response time.

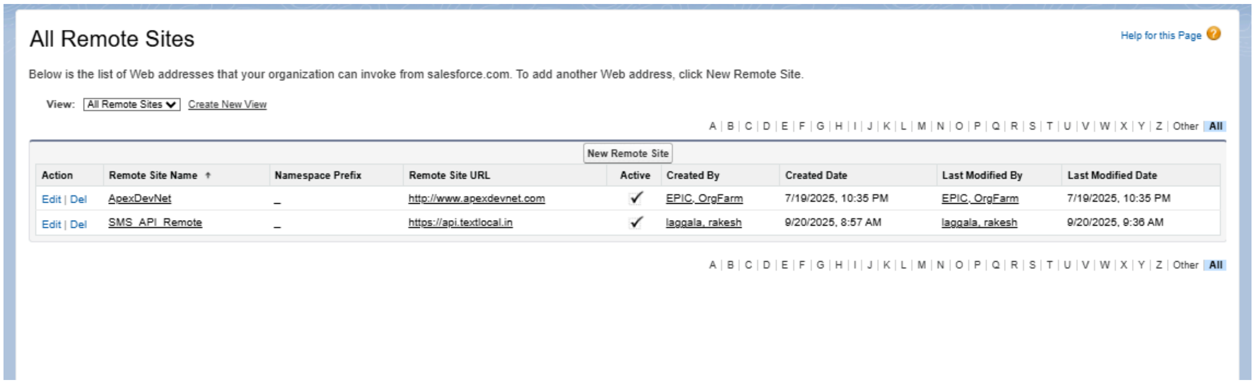
Platform Events

We used platform events to notify agents whenever a high-value lead comes in. For instance, if a customer shows interest in premium properties above a certain price, Salesforce generates an event that alerts the assigned agent immediately. This ensures priority leads are never missed.



Remote Site Settings

We configured remote site settings to allow Salesforce to make callouts to external systems, such as an SMS gateway. This enables Salesforce to send SMS confirmations or reminders directly to customers. Without this setting, Salesforce would block such requests for security reasons.



Phase 8: Data Management & Deployment :

Data Import Wizard → Import property and lead data from Excel

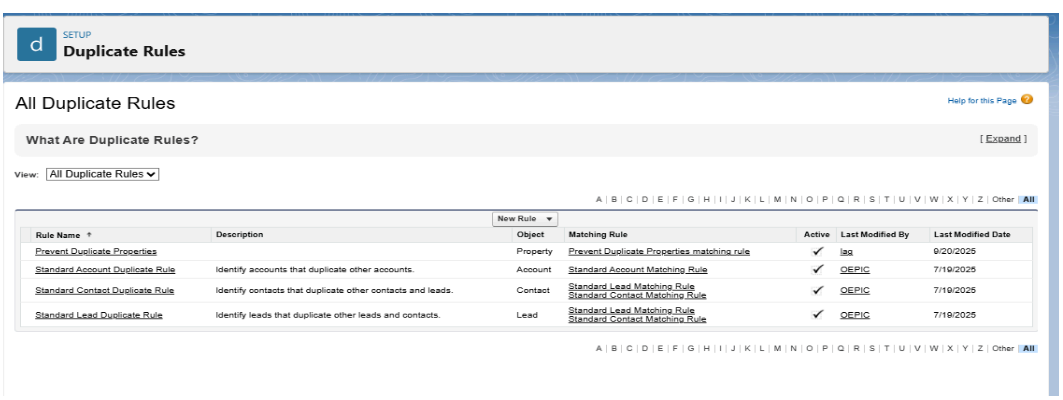
This is a simple, guided tool in Salesforce that allows you to bring in new records—like property listings or leads—directly from an Excel file. It's ideal for small to medium-sized imports and walks you through each step, mapping your spreadsheet columns to Salesforce fields so you don't make mistakes.

Data Loader → Bulk import legacy leads

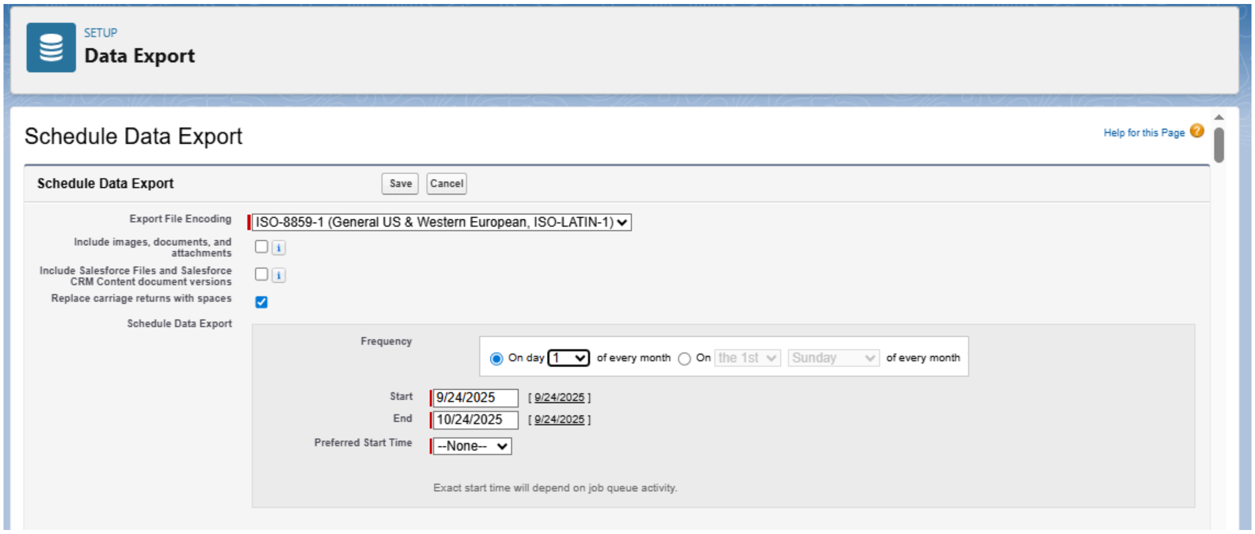
Data Loader is a more powerful tool for handling large volumes of data. If you have thousands of old leads from a previous system, you can use Data Loader to insert, update, or even delete records in bulk. It requires a CSV file and is especially useful when the import is too big for the standard Import Wizard.

Duplicate Rules → Prevent duplicate property listings

Duplicate Rules help keep your database clean by stopping identical or very similar records from being created. For example, if a property has already been entered, these rules will alert the user or block the entry to avoid confusion and maintain data accuracy.



Backup → Weekly data export for security
Regular backups involve exporting all your Salesforce data on a weekly schedule. This protects your business against accidental deletions, data corruption, or system failures, so you can always restore information if something goes wrong.

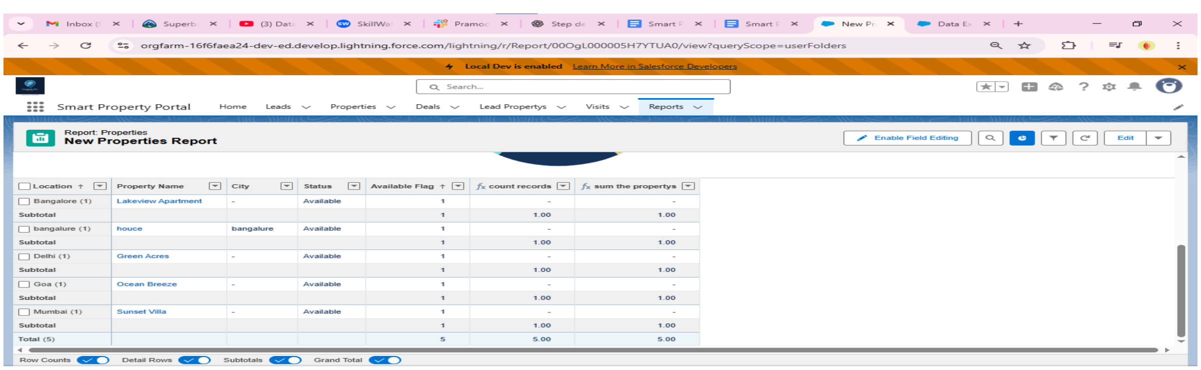


Phase 9: Reporting, Dashboards & Security Review :

Reports

Lead Funnel Report (New → Contacted → Converted)
This report shows the journey of leads through the sales process. You can see how many leads are new, how many have been contacted, and how many have converted into deals. It helps you spot where leads are getting stuck and which stages need more attention.

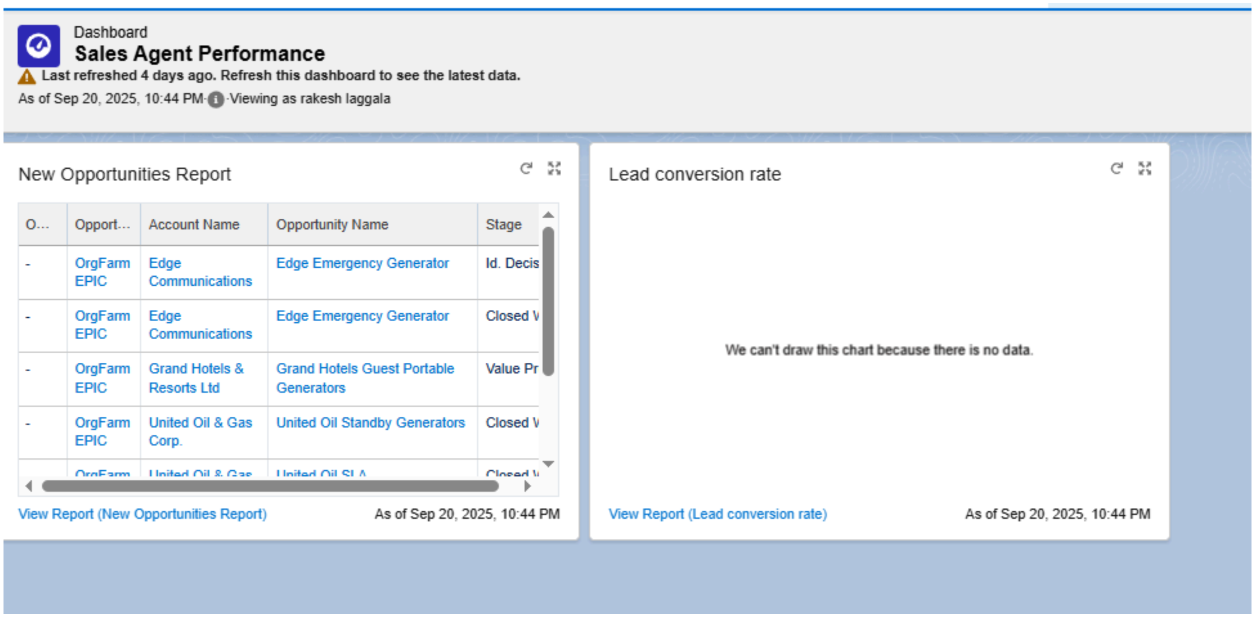
Property Availability Report
This report tracks which properties are currently available, booked, or sold. It gives a clear view of your inventory so your team knows what's ready to offer to clients and what's already taken.



Dashboards

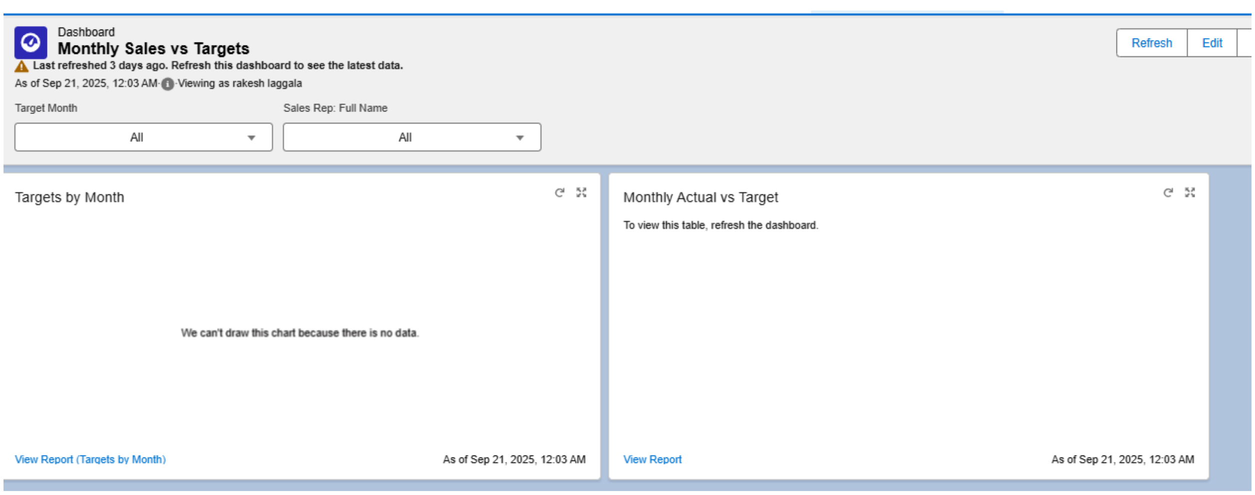
Sales Agent Performance Dashboard

This dashboard gives a quick visual summary of each agent's performance. It shows metrics like leads handled, deals closed, and conversion rates, making it easy to identify top performers and agents who may need support.



Monthly Sales vs. Targets Dashboard

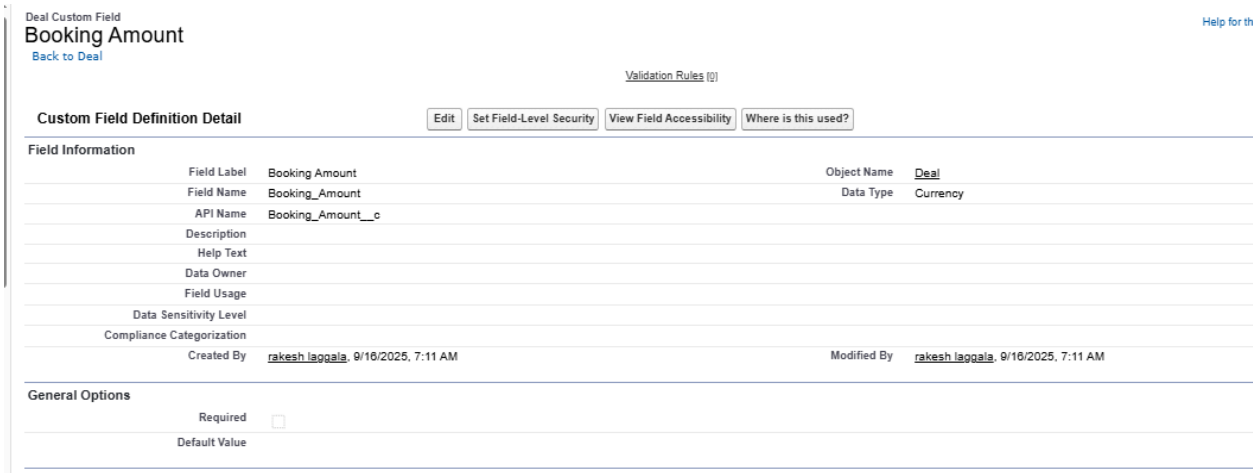
This dashboard compares actual sales with the set targets each month. It helps managers see at a glance whether the team is meeting goals and where adjustments are needed to improve performance.



Security Review

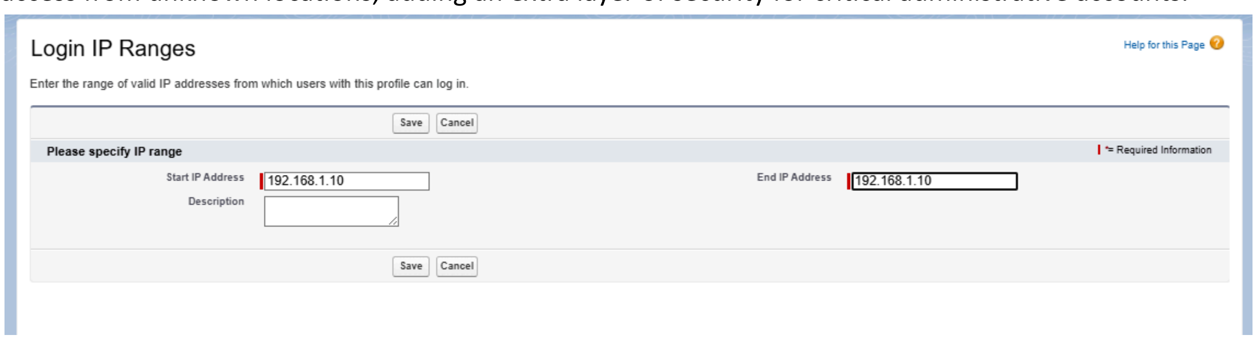
Field-level Security on Sensitive Fields (Booking Amount)

This ensures that sensitive information, like booking amounts, is only visible or editable by authorized users. It protects critical data from being accessed or changed by people who shouldn't see it.



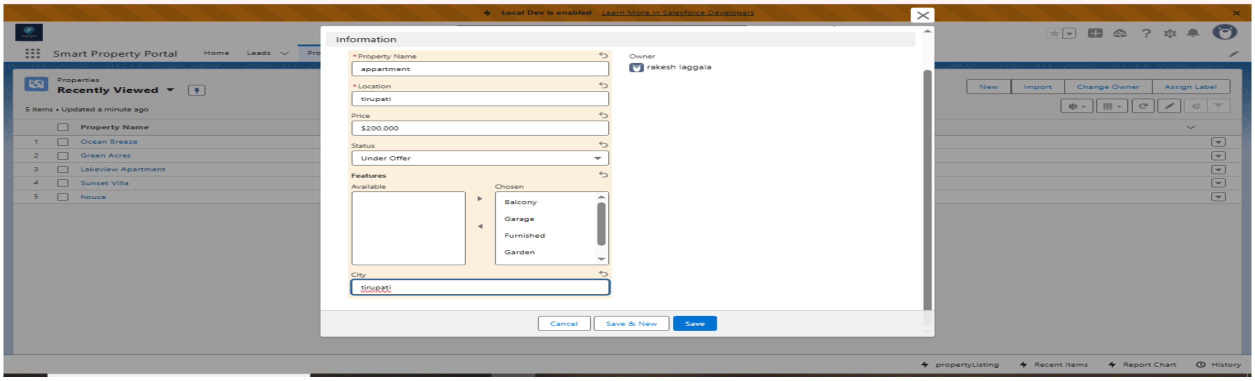
Login IP Restrictions for Admin

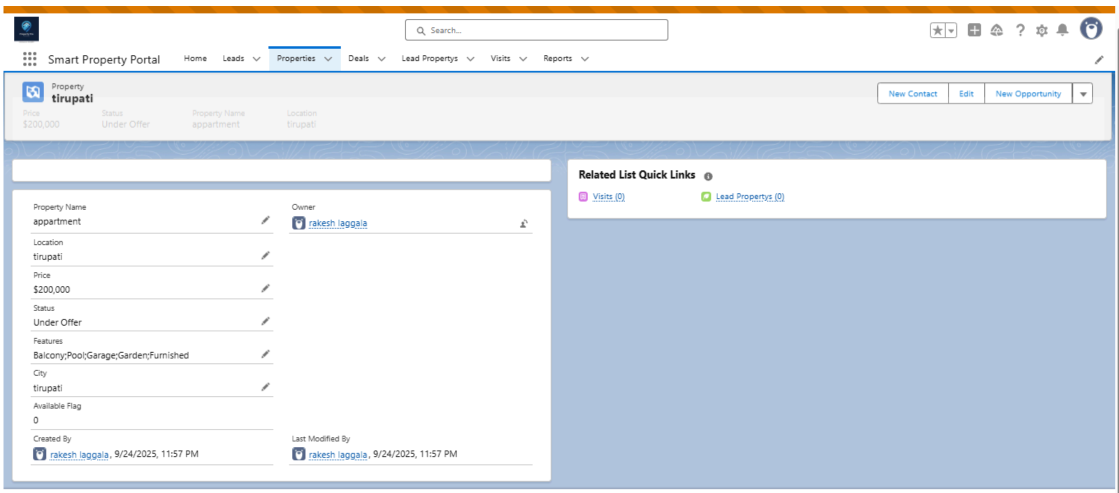
This restricts admin logins to specific IP addresses, like your office network. It prevents unauthorized access from unknown locations, adding an extra layer of security for critical administrative accounts.



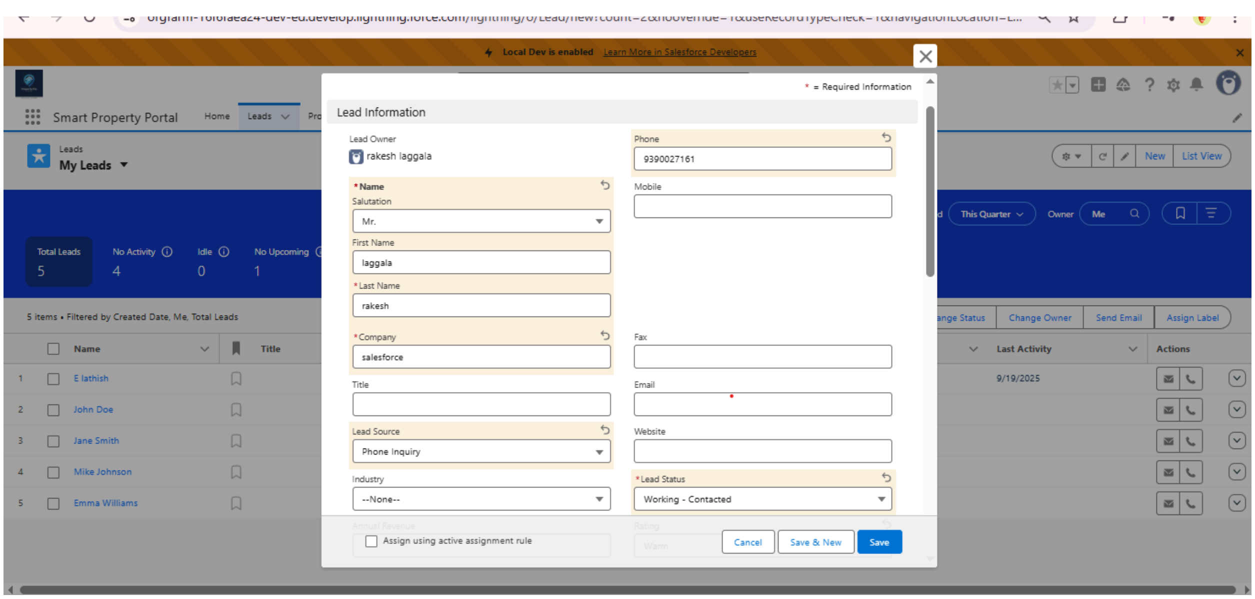
Phase 10: Quality Assurance Testing :

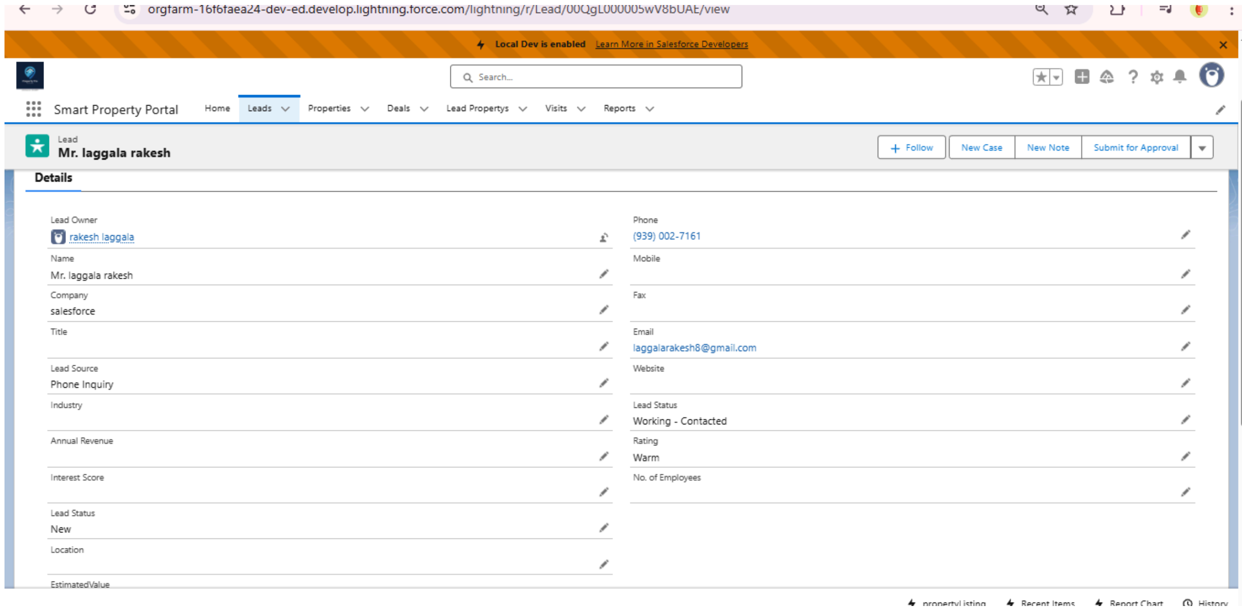
1. **Creating a new Property record with all mandatory fields.**





2. Creating a new Deal record with all mandatory fields





Conclusion:

The Smart Property Portal streamlines the entire property and lead management process, making it easier for agents and managers to work efficiently. By integrating features like lead tracking, property listings, automated task creation, approval processes, and detailed reporting, the portal ensures that no lead or opportunity is missed. Dashboards and reports provide real-time insights into agent performance, property availability, and sales targets, enabling informed decision-making.

The portal also emphasizes data integrity and security through features like duplicate rules, field-level security, login IP restrictions, and regular backups. Quality assurance testing confirms that all functionalities work as intended, minimizing errors and improving reliability.

Overall, the Smart Property Portal improves productivity, enhances data accuracy, and provides a centralized platform for managing properties and leads, making it an essential tool for modern real estate operations.