**Salesforce Project Implementation Document**

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

**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**

* Salesforce Edition: Enterprise/Developer Edition.
* **Company Profile Setup** → Set fiscal year as April–March.
* **Business Hours & Holidays** → Define 10am–7pm working hours, weekends off.
* **User Setup & Licenses** → Create profiles for “Admin,” “Sales Agent,” “Property Manager.”
* **Roles & Profiles** → Manager (top), Property Manager, Sales Agent (bottom).
* **Permission Sets** → Extra permissions for handling reports/dashboards.
* **OWD (Org-Wide Defaults)** → Leads: Private, Properties: Public Read/Write.
* **Sharing Rules** → Share leads among agents in same territory.
* **Sandbox Usage** → Create sandbox for testing automation.

**Phase 3: Data Modeling & Relationships**

**Objects & Fields**

* **Lead (Standard)**: Name, Email, Phone, Source, Interest Score, Status.
* **Property (Custom)**: Property Name, Location, Price, Status (Available/Sold), Features.
* **Visit (Custom)**: Visit Date, Customer, Agent, Property (lookup), Status.
* **Deal (Custom)**: Offer Price, Negotiation Notes, Status, Booking Amount, Documents.

**Relationships**

* **Property ↔ Visit** → Master-Detail (one property can have many visits).
* **Lead ↔ Deal** → Lookup (lead converts into deal).
* **Agent ↔ Visit** → Lookup.

**Schema Tools**

* Use Schema Builder to visualize objects and relationships.

**Phase 4: Process Automation (Admin)**

* **Validation Rules** → Ensure Email and Phone are not blank for leads.
* **Flow Builder** → Auto-assign leads to agents based on location.
* **Approval Process** → For deal closure approval by Property Manager.
* **Email Alerts** → Send confirmation email when visit is scheduled.
* **Custom Notifications** → Notify agent when a new lead is assigned.

**Phase 5: Apex Programming (Developer)**

* **Apex Trigger** → On lead conversion, auto-create related Account and Opportunity.
* **SOQL Queries** → Retrieve properties filtered by location/price.
* **Future Method** → Send SMS asynchronously after visit confirmation.
* **Test Class** → Write test classes for triggers with >75% coverage.

**Phase 6: User Interface Development**

* **Lightning App Builder** → Create “Smart Property Portal” app.
* **Record Pages** → Custom layouts for Leads, Properties, and Visits.
* **Tabs** → Leads, Properties, Visits, Deals.
* **Home Page** → Dashboard snapshot for sales agents.
* **Utility Bar** → Quick “Schedule Visit” button.
* **LWC (Optional)** → Create a property listing component showing available properties with filters (price, location).

**Phase 7: Integration & External Access**

* **Named Credentials** → Setup for integrating with SMS/Email API.
* **Web Services (REST)** → Expose endpoint for web forms to auto-create leads.
* **Platform Events** → Notify agents when high-value leads come in.
* **Remote Site Settings** → Allow API callouts to external systems (SMS gateway).

**Phase 8: Data Management & Deployment**

* **Data Import Wizard** → Import property and lead data from Excel.
* **Data Loader** → Bulk import legacy leads.
* **Duplicate Rules** → Prevent duplicate property listings.
* **Change Sets** → Deploy automation from sandbox to production.
* **Backup** → Weekly data export for security.

**Phase 9: Reporting, Dashboards & Security Review**

* **Reports**
  + Lead Funnel Report (New → Contacted → Converted).
  + Property Availability Report.
* **Dashboards**
  + Sales Agent Performance Dashboard.
  + Monthly Sales vs. Targets Dashboard.
* **Security Review**
  + Field-level security on sensitive fields (Booking Amount).
  + Login IP restrictions for Admin.

**Phase 10: Final Presentation & Demo Day**

* **Pitch Presentation** → “Smart Property Portal” helps real estate firms increase conversion by automating leads, visits, and deals.
* **Demo Walkthrough** → Show lead capture → Assignment → Visit scheduling → Deal closure → Dashboard.
* **Feedback Collection** → From mock stakeholders.
* **Handoff Documentation** → Object schema, automation flows, triggers.
* **LinkedIn/Portfolio Showcase** → Publish project demo and architecture.