

Phase 4: Automation & Business Logic (Salesforce Step-by-Step)

This phase focuses on automating tasks and implementing business logic in Salesforce for the Smart Property Portal project.

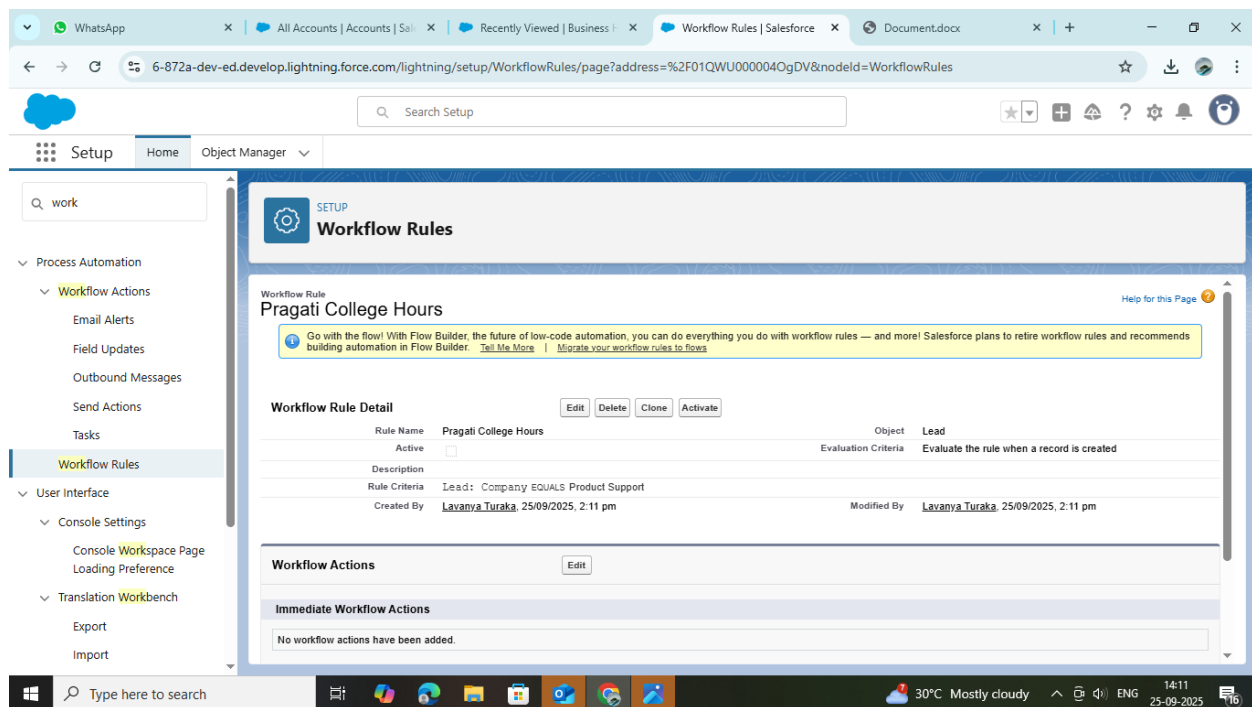
Step 1: Identify Automation Requirements

List tasks to automate: lead assignment, property follow-ups, visit scheduling, notification

Step 2: Create Workflow Rules

Setup → Workflow Rules → New Rule → Select Object (e.g., Lead, Property).

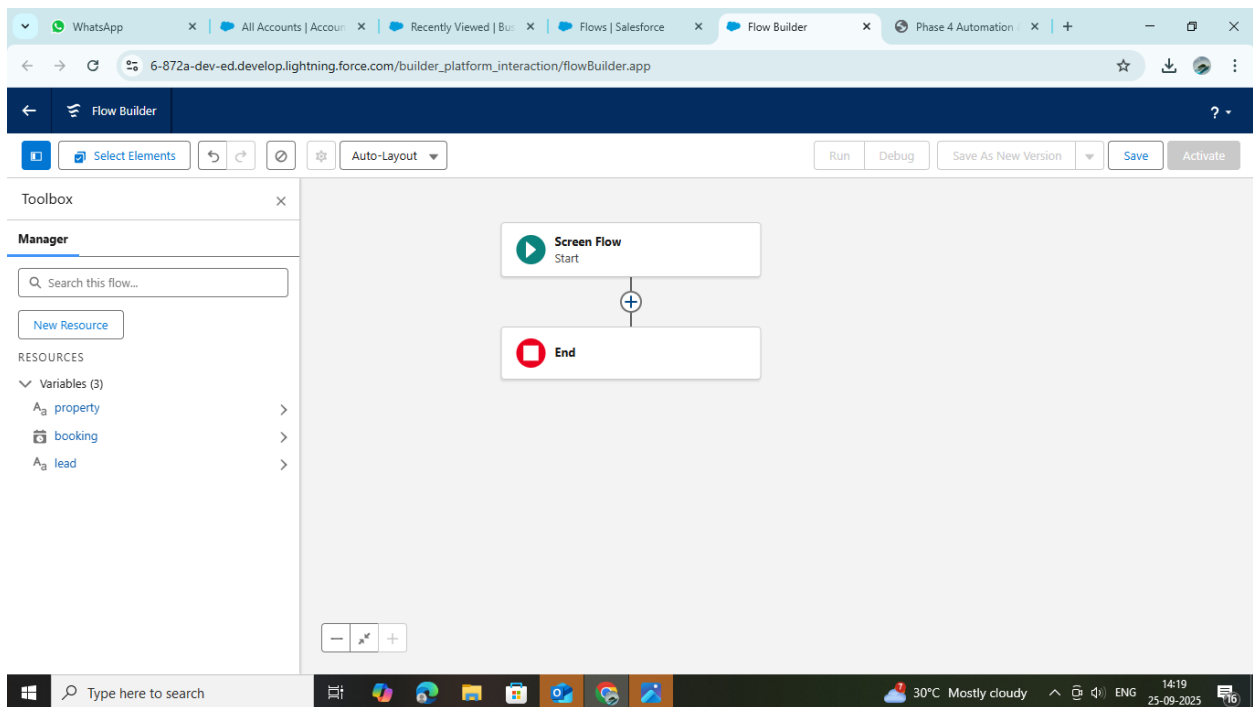
Define criteria and actions (field update, email alert, task creation).



Step 3: Build Flows

Setup → Flows → New Flow → Screen Flow or Record-Triggered Flow

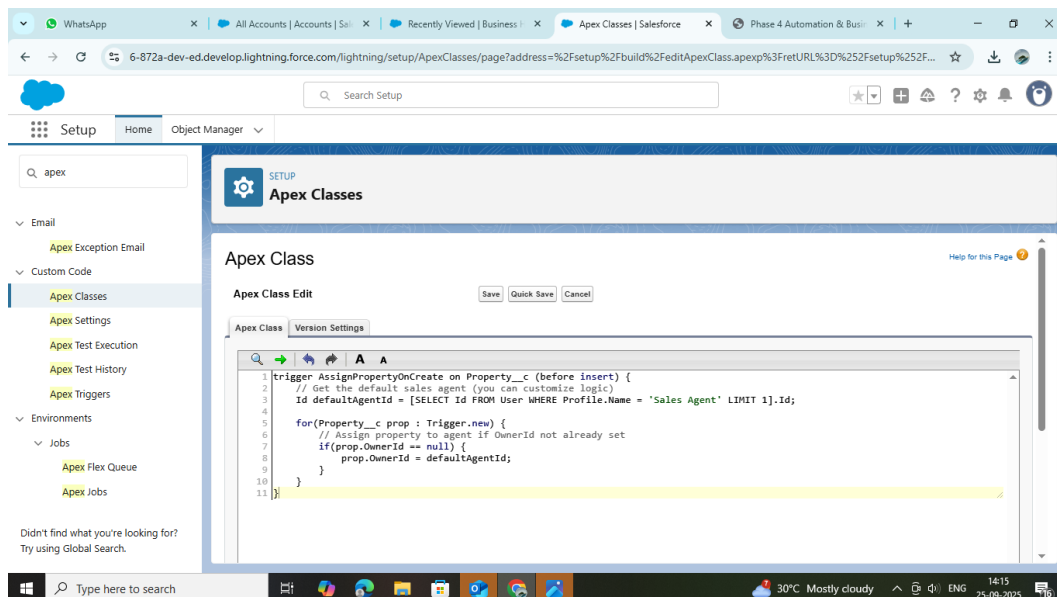
Automate processes like Property booking, Visit confirmation, or Lead conversion.



Step 4: Apex (if needed)

Setup → Apex Classes → New.

Write code for advanced logic that cannot be handled declaratively.



Step 5: Configure Inbound Integrations

Receive data from external systems:

Use Apex REST endpoints or Platform Events

Example: External system sends new lead → Salesforce creates Account/Lead automatically

Example Apex REST:

```
@RestResource(urlMapping='/createProperty/*') global with sharing class
PropertyRestController { @HttpPost global static String createProperty(String
propertyName, Decimal price) { Property_c prop = new Propertyc(Name=propertyName,
Price_c=price); insert prop; return 'Property Created: ' + prop.Id; }}
```

The screenshot shows the Salesforce Setup interface for Platform Events. The left sidebar contains a navigation menu with categories like MuleSoft, Einstein, Custom Code, Integrations, and Security. The main content area displays the 'Platform Event Definition Detail' for the 'Account' event. Below this, a table lists the 'Standard Fields' for the event.

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Created Date	CreatedDate	Date/Time		
	Event UUID	EventUuid	Text(36)		
	Replay ID	ReplayId	External Lookup		