Project Title : Smart Property Portal CRM (Real Estate)

Problem Statement :

Real estate firms face fragmented tracking of buyer-tenant-owner interactions, manual leasing/sales workflows, and siloed post-move-in service, leading to:

- Long sales/leasing cycles due to manual site visit coordination, booking approvals, and contract processing.
- High error rates in inventory status, pricing updates, and lease data due to spreadsheet-based management.
- Low transparency for prospects and tenants on visit status, booking confirmations, payments, and service requests.
- Limited visibility into pipeline, occupancy, rent roll, and maintenance SLAs for decision-making.
- Absence of a centralized, scalable CRM with dashboards to manage multi-project portfolios across locations and teams.

Smart Property Portal CRM addresses these by delivering a Salesforce-based application that:

- Centralizes property, unit, listing, lead, lease, invoice, and maintenance data with real estate-specific objects.
- Automates site visits, bookings, approvals, rent invoicing, collections, and maintenance workflows.
- Provides Experience Cloud portals for tenants/brokers to track status, submit requests, and access documents.

- Delivers interactive dashboards and reports for portfolio, pipeline, occupancy, rent roll, and service performance.

Phase 1 :

Problem Understanding & Industry Analysis :

This phase analyzes the real estate customer journey, stakeholder ecosystem, and alignment with industry practices to baseline the solution scope and data model. Key activities mirror the reference structure and are tailored to real estate operations:

- **Requirement Gatherin :** Capture functional/non-functional requirements for lead-to-lease, property inventory, invoicing, and maintenance processes.
- **Stakeholder Analysis :** Define roles and needs for Sales/Leasing, Property Management, Finance, Brokers/Partners, Tenants/Buyers, and Management.
- **Business Process Mapping :** Map end-to-end flows: inquiry → site visit → booking → contract/lease → invoicing/collections → service/renewals.
- **Industry-Specific Use Case Analysis :** Align with residential/commercial leasing practices, deposits, approvals, escalations, and renewals.
- **AppExchange Exploration :** Identify add-ons for document generation, advanced search, field service, and communication to enhance the core build.

Phase 2 : Org Setup and Configuration :

- ## Salesforce Edition :

Organization ID : 00DgK00000BhfUc

Organization Edition : Developer Edition

Instance : CAN96

See Company Profile screenshot for Edition.

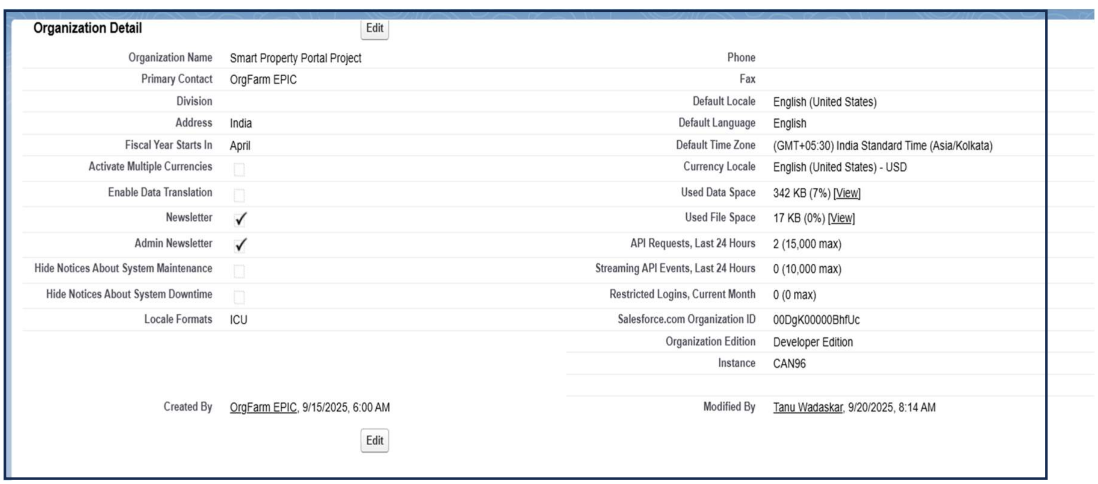
- ## Company Profile Setup :

Page : Setup → Company Information

Org identity : Organization Name, Org ID, and Instance (e.g., CAN96).

Edition : Developer Edition (features and limits depend on this).

Regional defaults : Default Locale, Default Language, Default Time Zone, and Currency Locale.



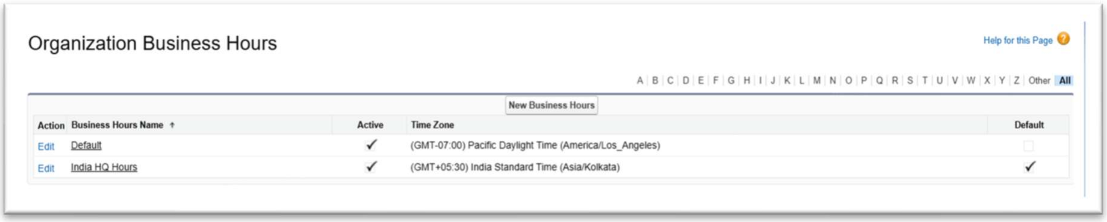
Organization Detail Edit

Organization Name	Smart Property Portal Project	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	India	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	☐	Currency Locale	English (United States) - USD
Enable Data Translation	☐	Used Data Space	342 KB (7%) [View]
Newsletter	✓	Used File Space	17 KB (0%) [View]
Admin Newsletter	✓	API Requests, Last 24 Hours	2 (15,000 max)
Hide Notices About System Maintenance	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	☐	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK00000BhfUc
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm EPIC, 9/15/2025, 6:00 AM	Modified By	Tanu Wadaskar, 9/20/2025, 8:14 AM

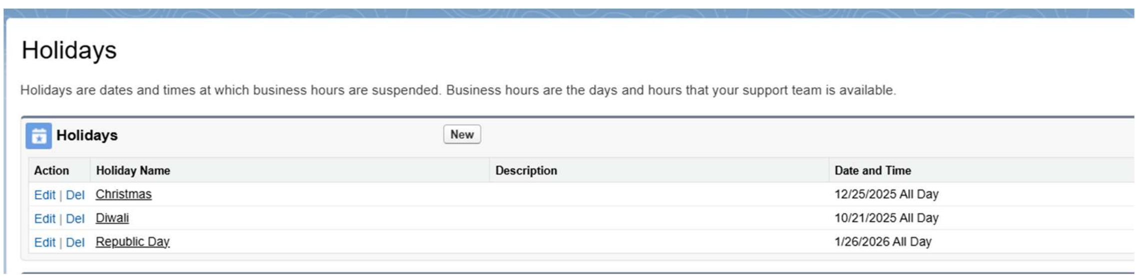
Edit

- ## Business Hours :

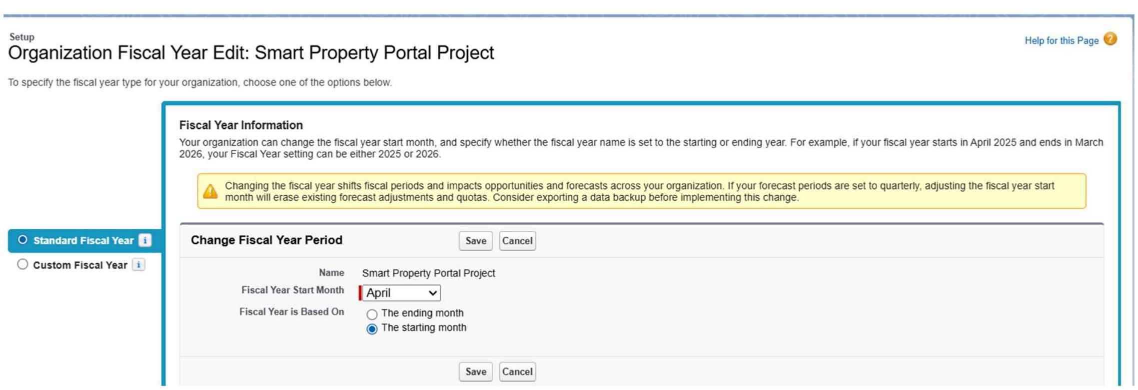
Defined default Business Hours with correct time zone, working days, and start-end times to drive SLAs/escalations for cases.



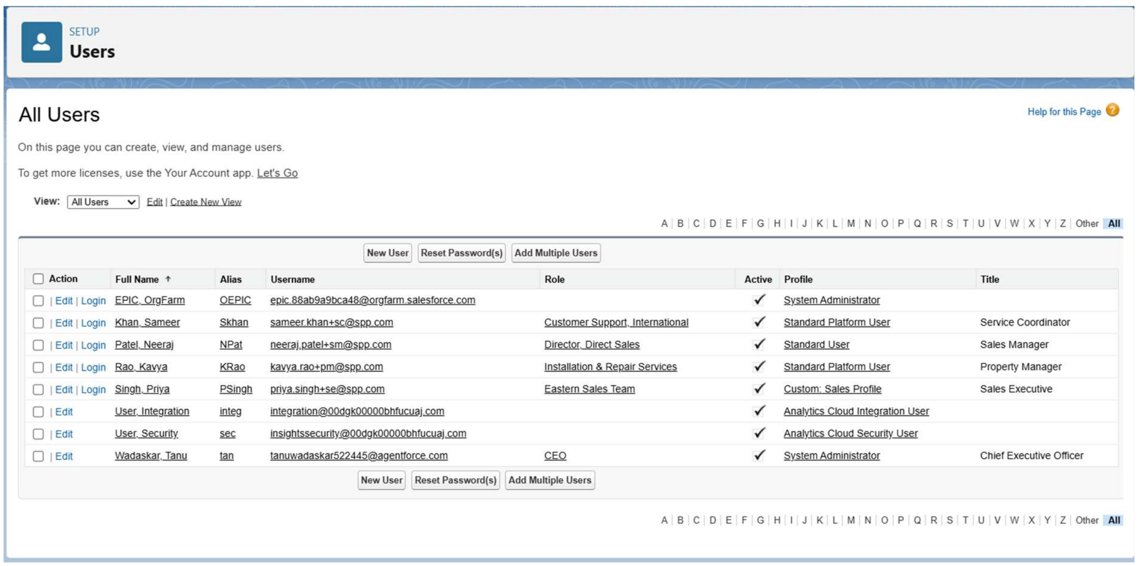
- **Holidays :**
  - Created org-wide holiday records (with names, dates, and recurrence if needed) under Setup → Holidays to reflect closures.
  - Associated these holidays with relevant Business Hours so SLAs/escalations pause during holiday periods.



- **Fiscal Year Settings :**
  - **Setting Chosen :** Standard Fiscal Year with start month, or Fiscal Year with defined quarters/periods; note the selected option and start month/structure.
  - **Implications :** Custom Fiscal Year affects reporting/forecasting and can't be reverted to Standard after enabling; document any labels or templates used (e.g., 4-4-5).



- ## User Setup & License :
  - Create test users:
    - Admin User : Full access, setup and deployment.
    - Sales Manager : Manages teams, approvals, discount approvals, inventory visibility.
    - Sales Agent : Manages assigned leads, site visits, offers and bookings.
  - Assign Standard Salesforce or Platform licenses as available, and map to roles.


SETUP
Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

View: All Users | Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

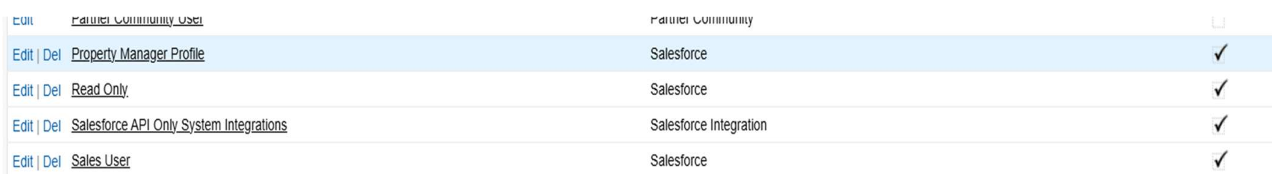
New User | Reset Password(s) | Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile	Title
Edit | Login	EPIC, OrgFarm	OEPIC	epic.88ab9a9bca48@orgfarm.salesforce.com		✓	System Administrator	
Edit | Login	Khan, Sameer	Skhan	sameer.khan+sc@spp.com	Customer Support, International	✓	Standard Platform User	Service Coordinator
Edit | Login	Patel, Neeraj	NPat	neeraj.patel+sm@spp.com	Director, Direct Sales	✓	Standard User	Sales Manager
Edit | Login	Rao, Kavya	KRao	kavya.rao+pm@spp.com	Installation & Repair Services	✓	Standard Platform User	Property Manager
Edit | Login	Singh, Priya	PSingh	priya.singh+se@spp.com	Eastern Sales Team	✓	Custom: Sales Profile	Sales Executive
Edit	User, Integration	integ	integration@00dgk00000bhfucuaj.com		✓	Analytics Cloud Integration User	
Edit	User, Security	sec	insightssecurity@00dgk00000bhfucuaj.com		✓	Analytics Cloud Security User	
Edit	Wadaskar, Tanu	tan	tanuwadaskar522445@agentforce.com	CEO	✓	System Administrator	Chief Executive Officer

New User | Reset Password(s) | Add Multiple Users

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

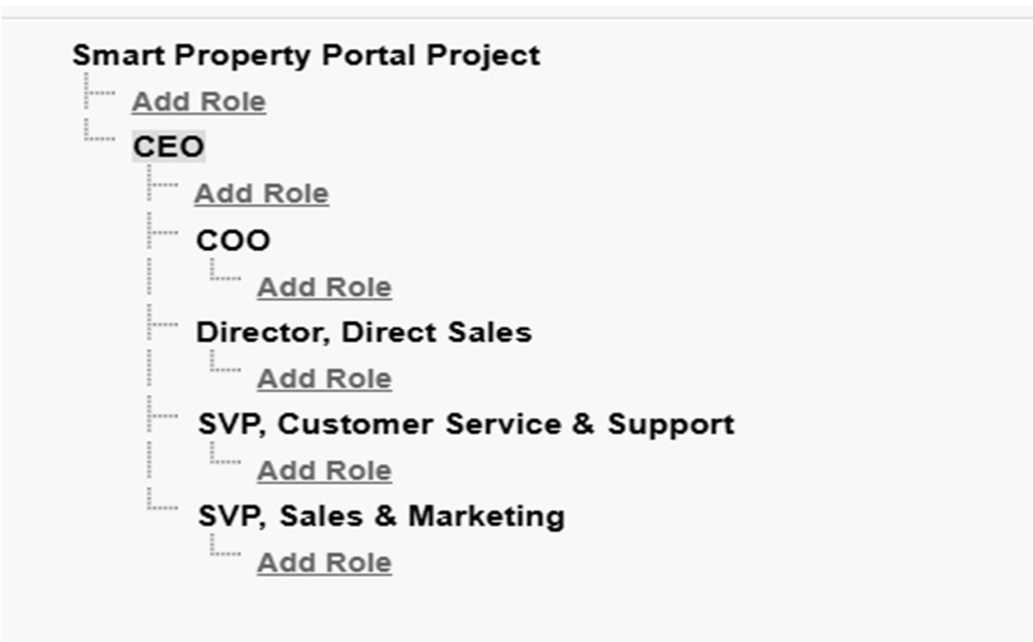
- ## Profiles :
    - Sales Agent Profile: CRUD on Lead, Site Visit, Offer, Booking, limited edit on Unit; read on Payment Milestone; no delete on Booking.
    - Sales Manager Profile: View All on Leads/Activities, Read/Edit on Units and Bookings, approval permissions for discount and booking approval processes.
    - Admin Profile: full system access and deployment controls. Profiles form the baseline FLS and object access.



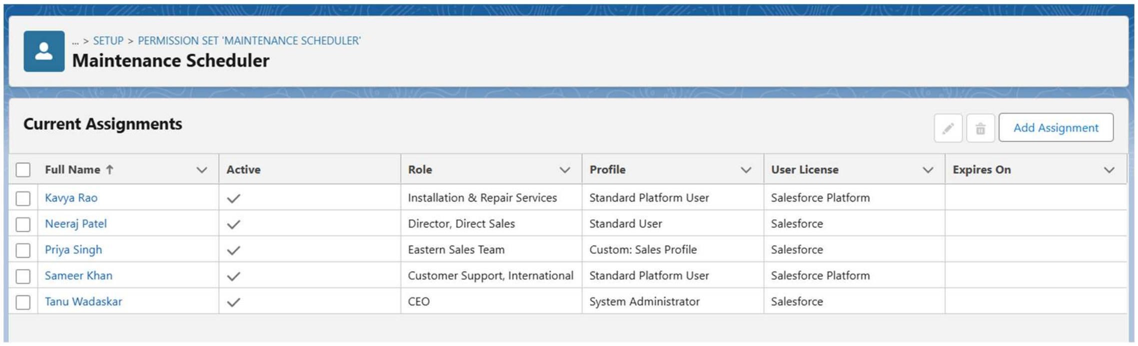
Edit | Del	Property Manager Profile	Salesforce	✓
Edit | Del	Read Only	Salesforce	✓
Edit | Del	Salesforce API Only System Integrations	Salesforce Integration	✓
Edit | Del	Sales User	Salesforce	✓

Edit	Cross Org Data Proxy User	XOrg Proxy User	☐
Edit | Del	Custom: Marketing Profile	Salesforce	✓
Edit | Del	Custom: Sales Profile	Salesforce	✓
Edit | Del	Custom: Support Profile	Salesforce	✓
Edit	Customer Community Login User	Customer Community Login	☐

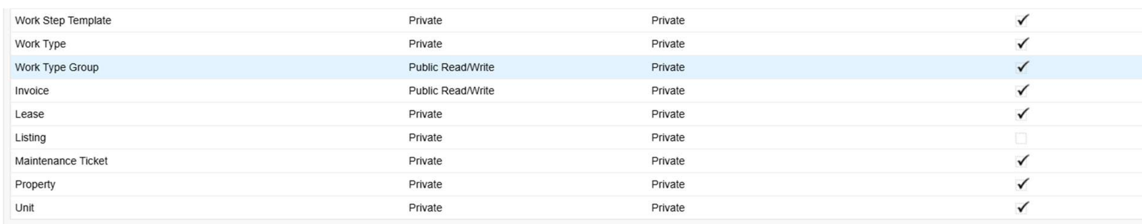
- **Roles :**
    - Role hierarchy: Admin → Sales Manager → Sales Agent; ensures managers see subordinate records for coaching and forecasting.



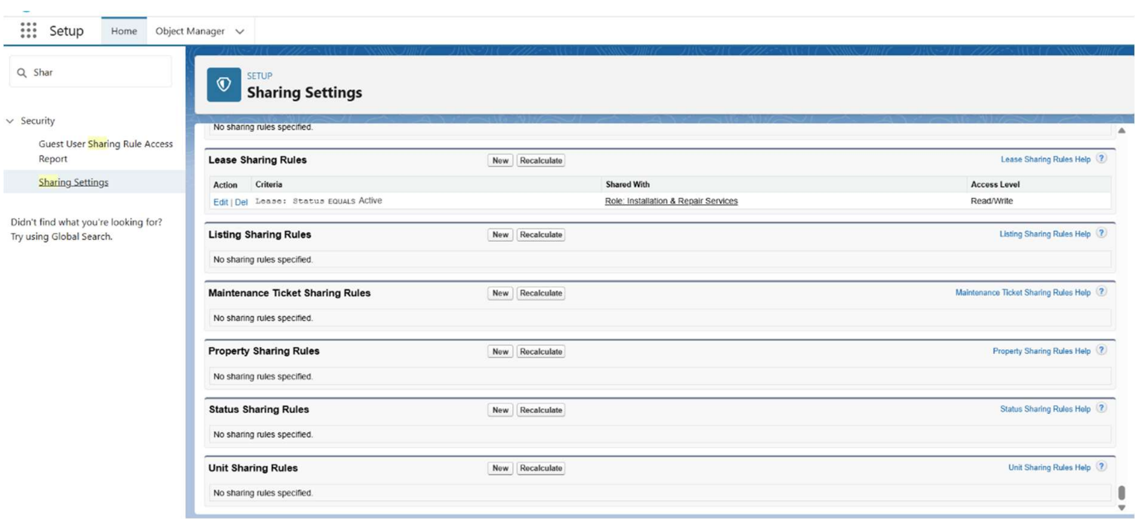
- **Permission Sets :**
    - Messaging Access: Channels (SMS/WhatsApp) and template send permissions.
    - Inventory Admin: Full edit on Property/Unit for inventory admins only.
    - Appointment Power User: Calendar, event series, and overbooking override if required.
    - Group permissions sets by function for easy assignment.



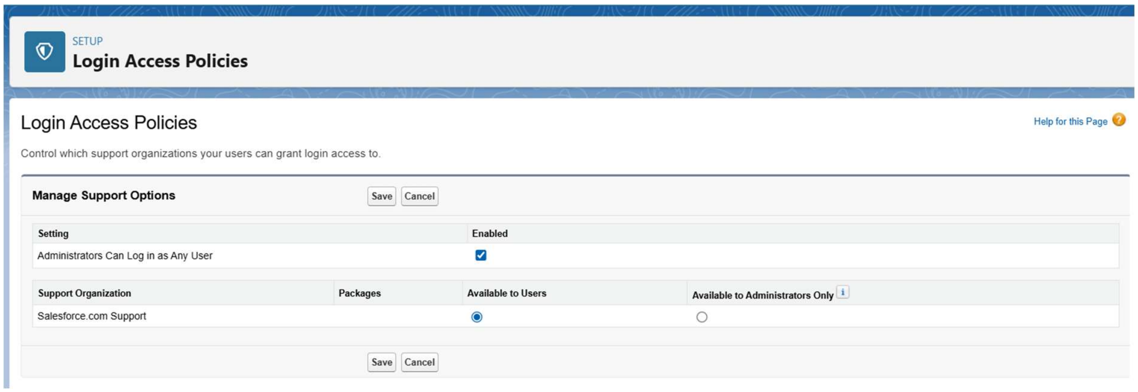
- **OWD (Org-wide defaults):**
  - Lead = Private (protect new prospects; share by assignment/team).
  - Property/Project = Public Read Only (marketing transparency)
  - Unit(Inventory) = Private (prevent accidental edits; grant via role/perm sets).



- **Sharing Rules :**
  - Share Leads/Opportunities owned by Sales agents with their Sales Manager role with Read/Write.
  - Criteria-based sharing for Property/Unit by project/city to regional teams.



- **Login Access Policies:**
    - Keep defaults; enable admin login-as if allowed by policy for support during UAT.



- **Dev Org Setup**
- **Sandbox Usage**
- **Deployment Basics**