

 **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 Gathering :** 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	<input type="checkbox"/>	Currency Locale English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space 342 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space 17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours 2 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours 0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	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.

Organization Business Hours

Help for this Page

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

Action	Business Hours Name	Active	Time Zone	New Business Hours	Default
Edit	Default	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)		<input type="checkbox"/>
Edit	India HQ Hours	<input checked="" type="checkbox"/>	(GMT+05:30) India Standard Time (Asia/Kolkata)		<input checked="" type="checkbox"/>

- **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.

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Action	Holiday Name	Description	Date and Time
Edit Del	Christmas		12/25/2025 All Day
Edit Del	Diwali		10/21/2025 All Day
Edit Del	Republic Day		1/26/2026 All Day

- **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).

Setup Organization Fiscal Year Edit: Smart Property Portal Project Help for this Page

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information													
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.													
<p>⚠️ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.</p>													
<p><input checked="" type="radio"/> Standard Fiscal Year </p> <p><input type="radio"/> Custom Fiscal Year </p>													
<p>Change Fiscal Year Period</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Smart Property Portal Project</th> <th>Save</th> <th>Cancel</th> </tr> </thead> <tbody> <tr> <td>Fiscal Year Start Month</td> <td><input type="text" value="April"/></td> <td><input type="button" value="Save"/></td> <td><input type="button" value="Cancel"/></td> </tr> <tr> <td>Fiscal Year is Based On</td> <td> <input type="radio"/> The ending month <input checked="" type="radio"/> The starting month </td> <td><input type="button" value="Save"/></td> <td><input type="button" value="Cancel"/></td> </tr> </tbody> </table>		Name	Smart Property Portal Project	Save	Cancel	Fiscal Year Start Month	<input type="text" value="April"/>	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	Fiscal Year is Based On	<input type="radio"/> The ending month <input checked="" type="radio"/> The starting month	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
Name	Smart Property Portal Project	Save	Cancel										
Fiscal Year Start Month	<input type="text" value="April"/>	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>										
Fiscal Year is Based On	<input type="radio"/> The ending month <input checked="" type="radio"/> The starting month	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>										

• 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.

The screenshot shows the Salesforce 'All Users' page. At the top, there's a header with a user icon, 'SETUP', and 'Users'. Below it, a sub-header says 'All Users'. A message says 'On this page you can create, view, and manage users.' and 'To get more licenses, use the Your Account app: [Let's Go](#)'. There are buttons for 'View: All Users', 'Edit', and 'Create New View'. The main area is a table with columns: Action, Full Name, Alias, Username, Role, Active, Profile, and Title. The table lists several users with their respective details. At the bottom of the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile	Title
Edit Login	EPIC_OrgFarm	QEPI	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@00dgk000000hfucuaj.com		✓	Analytics Cloud Integration User	
Edit	User_Security	sec	insightssecurity@00dgk000000bhfcuaj.com		✓	Analytics Cloud Security User	
Edit	Wadaskar_Tanu	tan	tanuwadaskar522445@agentforce.com	CEO	✓	System Administrator	Chief Executive Officer

• Profiles :

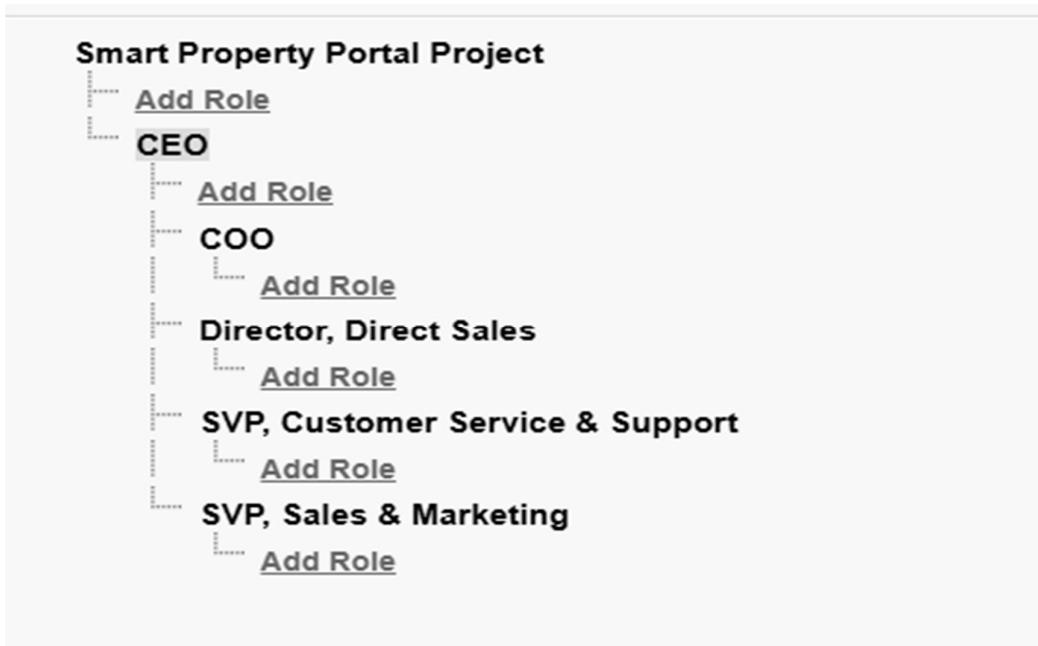
- Sales Agent Profile: CRUD on Lead, Site Visit, Offer, Booking, limited edit on Unit; read on Payment Milestone; no delete on Booking.
- Sales Manager Profile: View All on Leads/Activities, Read/Edit on Units and Bookings, approval permissions for discount and booking approval processes.
- Admin Profile: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

Object	Profile Community User	Profile Community
Edit Del <u>Property Manager Profile</u>		Salesforce
Edit Del <u>Read Only</u>		Salesforce
Edit Del <u>Salesforce API Only System Integrations</u>		Salesforce Integration
Edit Del <u>Sales User</u>		Salesforce

Edit	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
Edit	Customer Community Login User	Customer Community Login	<input type="checkbox"/>

- **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.

The screenshot shows the 'Maintenance Scheduler' permission set in the Setup interface. It displays a table of current assignments, including columns for Full Name, Active status, Role, Profile, User License, and Expires On. The table lists several users assigned to the 'Maintenance Scheduler' permission set.

Full Name	Active	Role	Profile	User License	Expires On
Kavya Rao	✓	Installation & Repair Services	Standard Platform User	Salesforce Platform	
Neeraj Patel	✓	Director, Direct Sales	Standard User	Salesforce	
Priya Singh	✓	Eastern Sales Team	Custom: Sales Profile	Salesforce	
Sameer Khan	✓	Customer Support, International	Standard Platform User	Salesforce Platform	
Tanu Wadaskar	✓	CEO	System Administrator	Salesforce	

• 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).

The screenshot shows the 'Sharing Settings' page in the Setup interface. It displays a table of Org-wide Defaults (OWD) for different objects, including Work Step Template, Work Type, Work Type Group, Invoice, Lease, Listing, Maintenance Ticket, Property, and Unit. The table shows the sharing level (Private or Public Read/Write) and whether it is a Public Read Only object.

Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Invoice	Public Read/Write	Private	✓
Lease	Private	Private	✓
Listing	Private	Private	□
Maintenance Ticket	Private	Private	✓
Property	Private	Private	✓
Unit	Private	Private	✓

• 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.

The screenshot shows the 'Sharing Settings' page in the Setup interface. It displays sections for Lease Sharing Rules, Listing Sharing Rules, Maintenance Ticket Sharing Rules, Property Sharing Rules, Status Sharing Rules, and Unit Sharing Rules. Each section shows the criteria for sharing rules, such as 'Lease: Status EQUALS Active' for Lease Sharing Rules.

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

The screenshot shows the Salesforce Setup interface with the title "Login Access Policies". Below the title, it says "Control which support organizations your users can grant login access to." There is a "Help for this Page" link with a question mark icon. The main area is titled "Manage Support Options" with "Save" and "Cancel" buttons. It contains two sections: "Setting" and "Support Organization". In the "Setting" section, there is a row for "Administrators Can Log in as Any User" with a checked checkbox labeled "Enabled". In the "Support Organization" section, there is a row for "Salesforce.com Support" with two radio buttons: one labeled "Available to Users" (selected) and one labeled "Available to Administrators Only".

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

Phase 3 : Data Modeling & Relationships

- **Standard & Custom Objects:**

- **Standard objects used:** Leads, Accounts, Contacts, opportunities
 - Lead converts to Account + Contract (+ Opportunity) for deal tracking and forecasting.
- **Custom Objects:**
 - Property_Project__c : for grouping units and reporting across locations.
 - Unit__c : Inventory record of each flat/plot with pricing and availability for sales selection.
 - Site_Visit__c : Tracks scheduled/completed visits, outcomes, and next actions to drive conversion.
 - Offer__c : Stores quotations and discounts to manage negotiation before booking.
 - Booking__c : Confirms the selected unit and buyer details, forming the basis for payments.
 - Payment_Milestone__c : Breaks the booking amount into due stages for collection tracking.
 - Channel_Partner__c : Captures broker details and attribution for partner-driven deals.

Booking__c	Booking_c_c	Custom Object
Channel_Partner__c	Channel_Partner_c_c	Custom Object

SETUP

Object Manager

225 Items, Sorted by Label

Offer_c
Offer_c_c
Custom Object

SETUP

Object Manager

225 Items, Sorted by Label

Property_Project_c
Property_Project_c_c
Custom Object

SETUP

Object Manager

225 Items, Sorted by Label

Site_Visit_c
Site_Visit_c_c
Custom Object

SETUP

Object Manager

225 Items, Sorted by Label

Unit_c
Unit_c_c
Custom Object

Setup [Home](#) [Object Manager](#) ▾

SETUP

Object Manager

225 Items, Sorted by Label

Payment_Milestone_c
Payment_Milestone_c_c
Custom Object

- **Fields :**

- 1) **Property_Project__c :**

SETUP > OBJECT MANAGER
Property_Project__c

[Details](#)
Fields & Relationships
[Page Layouts](#)
[Lightning Record Pages](#)
[Buttons, Links, and Actions](#)
[Compact Layouts](#)
[Field Sets](#)
[Object Limits](#)
[Record Types](#)
[Related Lookup Filters](#)
[Restriction Rules](#)
[Scoping Rules](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING
Address	Address__c	Long Text Area(32768)	
City	City__c	Picklist	
Created By	CreatedBy	Lookup(User)	
Last Modified By	LastModifiedBy	Lookup(User)	
Launch Date	Launch_Date__c	Date	
Owner	OwnerId	Lookup(User,Group)	
Project Name	Project_Name__c	Text(18)	
Property Name	Name	Text(80)	

- 2) **Unit__c:**

Setup > Object Manager
Unit__c

[Home](#) [Object Manager](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTRO
Carpet Area	Carpet_Area__c	Number(18, 0)	
Created By	CreatedBy	Lookup(User)	
Floor	Floor__c	Number(18, 0)	
Last Modified By	LastModifiedBy	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Price	Price__c	Currency(18, 0)	
Project	Project__c	Lookup(Property_Project__c)	
Status	Status__c	Picklist	

3) Site_Visit__c:

The screenshot shows the 'Object Manager' section for the 'Site_Visit__c' object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area displays a table of fields with their labels, internal names, and data types.

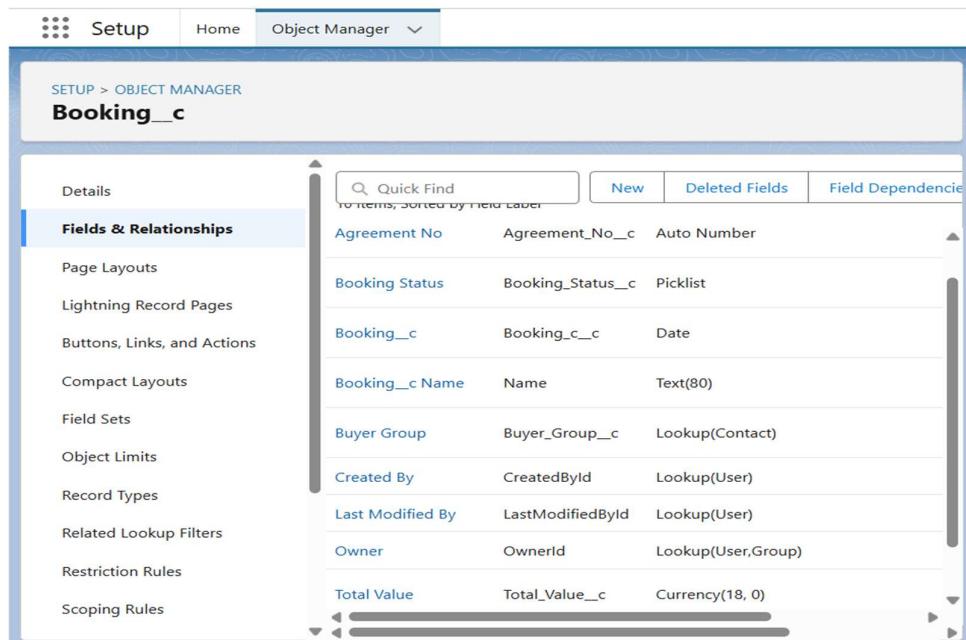
Field	Label	Type
Agent	Agent_c	Lookup(User)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Next Action	Next_Action__c	Text(30)
Outcome	Outcome__c	Picklist
Owner	OwnerId	Lookup(User,Group)
Prospect	Prospect__c	Lookup(Contact)
Site_Visit__c Name	Name	Text(80)
Visit Date & Time	Visit_Date_Time__c	Date/Time

4) Offer__c:

The screenshot shows the 'Object Manager' section for the 'Offer__c' object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area displays a table of fields with their labels, internal names, and data types.

Field	Label	Type
Buyer Group	Buyer_Group_c	Lookup(Lead)
Created By	CreatedById	Lookup(User)
Discount Percent	Discount_Percent__c	Percent(18, 0)
Last Modified By	LastModifiedById	Lookup(User)
Offer__c Name	Name	Text(80)
Owner	OwnerId	Lookup(User,Group)
Quoted Amount	Quoted_Amount__c	Currency(18, 0)
Stage	Stage_c	Picklist
Unit	Unit_c	Lookup(Unit_c)

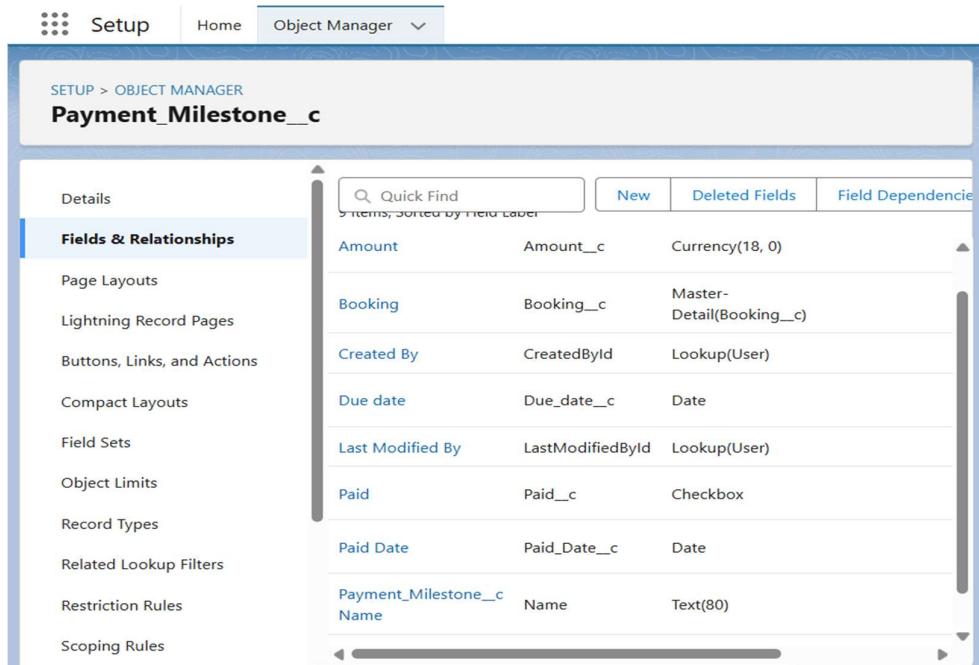
5) Booking_c:



The screenshot shows the Salesforce Object Manager interface for the object 'Booking_c'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Booking_c'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships (which is selected and highlighted in blue), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The right pane displays a table of fields with their details. The fields listed are:

Agreement No	Agreement_No__c	Auto Number
Booking Status	Booking_Status__c	Picklist
Booking_c	Booking_c__c	Date
Booking_c Name	Name	Text(80)
Buyer Group	Buyer_Group__c	Lookup(Contact)
Created By	CreatedBy	Lookup(User)
Last Modified By	LastModifiedBy	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Total Value	Total_Value__c	Currency(18, 0)

6) Payment_Milestone_c



The screenshot shows the Salesforce Object Manager interface for the object 'Payment_Milestone_c'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Payment_Milestone_c'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships (selected and highlighted in blue), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The right pane displays a table of fields with their details. The fields listed are:

Amount	Amount__c	Currency(18, 0)
Booking	Booking__c	Master-Detail(Booking__c)
Created By	CreatedBy	Lookup(User)
Due date	Due_date__c	Date
Last Modified By	LastModifiedBy	Lookup(User)
Paid	Paid__c	Checkbox
Paid Date	Paid_Date__c	Date
Payment_Milestone_c Name	Name	Text(80)

7) Channel_Partner__c:

The screenshot shows the Salesforce Object Manager interface for the 'Channel_Partner__c' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Channel_Partner__c'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The main content area displays the field definitions for 'Channel_Partner__c'. Fields include:

Name	Type	Description
Name	Text(80)	
Commission Percent	Percent(18, 0)	
Contact Person	Contact_Person__c	Text(18)
Created By	CreatedBy	Lookup(User)
Last Modified By	LastModifiedBy	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Partner Name	Partner_Name__c	Text(18)
Phone	Phone__c	Phone
Status	Status__c	Picklist

- **Record Types:**

- Created record types per object and mapped layouts/picklists: Unit__c (Residential, Commercial), Offer__c (Retail, Channel Partner), Booking__c (Standard, Channel Partner), each with tailored page layouts and restricted picklist values.
- Assigned record types and defaults by profile so agents see the right layout by default during create; verified via the Profile → Record Type Settings screen.

1) Unit_c record type:

The screenshot shows the Salesforce Object Manager for the Unit_c object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The 'Record Types' option is selected and highlighted in blue. The main content area displays a table titled 'RECORD TYPE L...'. It contains two entries: 'Commercial Unit' and 'Residential Unit'. Both records are marked as 'ACTIVE' and were modified by 'Tanu Wadaskar' at '9/21/2025, 1:24 PM' and '9/21/2025, 1:23 PM' respectively. The table has columns for 'RECORD TYPE L...', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'.

RECORD TYPE L...	DESCRIPTION	ACTIVE	MODIFIED BY
Commercial Unit	Commercial inventory variant (shops/offices)	✓	Tanu Wadaskar, 9/21/2025, 1:24 PM
Residential Unit	Residential inventory variant (apartments/flats)	✓	Tanu Wadaskar, 9/21/2025, 1:23 PM

2) Offer_c record type:

The screenshot shows the Salesforce Object Manager for the Offer_c object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The 'Record Types' option is selected and highlighted in blue. The main content area displays a table titled 'RECORD TYPE L...'. It contains two entries: 'Channel Partner Offer' and 'Retail Offer'. Both records are marked as 'ACTIVE' and were modified by 'Tanu Wadaskar' at '9/21/2025, 1:36 PM' and '9/21/2025, 1:34 PM' respectively. The table has columns for 'RECORD TYPE L...', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'.

RECORD TYPE L...	DESCRIPTION	ACTIVE	MODIFIED BY
Channel Partner Offer	Broker-assisted offer with commission eligibility	✓	Tanu Wadaskar, 9/21/2025, 1:36 PM
Retail Offer	Direct buyer offer	✓	Tanu Wadaskar, 9/21/2025, 1:34 PM

3) Booking_c record type:

The screenshot shows the Salesforce Object Manager for the Booking_c object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The 'Record Types' option is selected and highlighted in blue. The main content area displays a table titled 'RECORD TYPE L...'. It contains two entries: 'Channel Partner Booking' and 'Standard Booking'. Both records are marked as 'ACTIVE' and were modified by 'Tanu Wadaskar' at '9/21/2025, 1:40 PM' and '9/21/2025, 1:39 PM' respectively. The table has columns for 'RECORD TYPE L...', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'.

RECORD TYPE L...	DESCRIPTION	ACTIVE	MODIFIED BY
Channel Partner Booking	Booking via partner; includes commission/referral tracking.	✓	Tanu Wadaskar, 9/21/2025, 1:40 PM
Standard Booking	Direct booking without partner commission	✓	Tanu Wadaskar, 9/21/2025, 1:39 PM

- **Page Layouts:**

- Built separate layouts and mapped them via the Page Layout Assignment matrix so each profile/record type sees the right fields and related lists during create and view.
- Kept layouts lean and organized by sections; configured related list columns and order for Units, Offers, and Bookings to speed data entry.

1) Unit_c:

SETUP > OBJECT MANAGER
Unit_c

PAGE LAYOUT N...	CREATED BY	MODIFIED BY
Commercial Layout	Tanu Wadaskar, 9/21/2025, 1:21 PM	Tanu Wadaskar, 9/21/2025, 1:21 PM
Residential Layout	Tanu Wadaskar, 9/21/2025, 1:20 PM	Tanu Wadaskar, 9/21/2025, 1:21 PM
Unit_c Layout	Tanu Wadaskar, 9/21/2025, 11:28 AM	Tanu Wadaskar, 9/21/2025, 12:45 PM

2) Offer_c:

SETUP > OBJECT MANAGER
Offer_c

PAGE LAYOUT N...	CREATED BY	MODIFIED BY
Offer_c Layout	Tanu Wadaskar, 9/21/2025, 11:29 AM	Tanu Wadaskar, 9/21/2025, 12:08 PM
Offer-CP Layout	Tanu Wadaskar, 9/21/2025, 1:35 PM	Tanu Wadaskar, 9/21/2025, 1:35 PM
Offer-Retail Layout	Tanu Wadaskar, 9/21/2025, 1:31 PM	Tanu Wadaskar, 9/21/2025, 1:31 PM

3) Booking_c:

SETUP > OBJECT MANAGER

Booking_c

Page Layouts

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Booking_c Layout	Tanu Wadaskar, 9/21/2025, 11:29 AM	Tanu Wadaskar, 9/21/2025, 12:12 PM
Booking-CP Layout	Tanu Wadaskar, 9/21/2025, 1:38 PM	Tanu Wadaskar, 9/21/2025, 1:38 PM
Booking-Standard Layout	Tanu Wadaskar, 9/21/2025, 1:37 PM	Tanu Wadaskar, 9/21/2025, 1:37 PM

4) Property_Project_c:

SETUP > OBJECT MANAGER

Property_Project_c

Page Layouts

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Project Layout	Tanu Wadaskar, 9/21/2025, 1:54 PM	Tanu Wadaskar, 9/21/2025, 1:55 PM
Property_Project_c Layout	Tanu Wadaskar, 9/21/2025, 11:27 AM	Tanu Wadaskar, 9/21/2025, 12:45 PM

5) Site_Visit__c:

The screenshot shows the 'Page Layouts' section of the Site_Visit__c object's setup page. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main area displays two page layouts: 'Site Visit Layout' and 'Site_Visit__c Layout'. Both were created by Tanu Wadaskar on 9/21/2025.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Site Visit Layout	Tanu Wadaskar, 9/21/2025, 1:56 PM	Tanu Wadaskar, 9/21/2025, 1:56 PM
Site_Visit__c Layout	Tanu Wadaskar, 9/21/2025, 11:28 AM	Tanu Wadaskar, 9/21/2025, 12:38 PM

6) Payment_Milestone__c:

The screenshot shows the 'Page Layouts' section of the Payment_Milestone__c object's setup page. The left sidebar lists various configuration options. The main area displays two page layouts: 'Milestone Layout' and 'Payment_Milestone__c Layout'. Both were created by Tanu Wadaskar on 9/21/2025.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Milestone Layout	Tanu Wadaskar, 9/21/2025, 1:59 PM	Tanu Wadaskar, 9/21/2025, 2:00 PM
Payment_Milestone__c Layout	Tanu Wadaskar, 9/21/2025, 11:29 AM	Tanu Wadaskar, 9/21/2025, 12:12 PM

- **Compact Layouts :**

- Compact layouts show a record's key fields in the highlights panel and mobile header so users can scan critical info at a glance without scrolling.

- 1) Listing :

The screenshot shows the Salesforce Object Manager interface for the 'Listing' object. The left sidebar has a 'Compact Layouts' section selected. The main area displays a table of compact layouts:

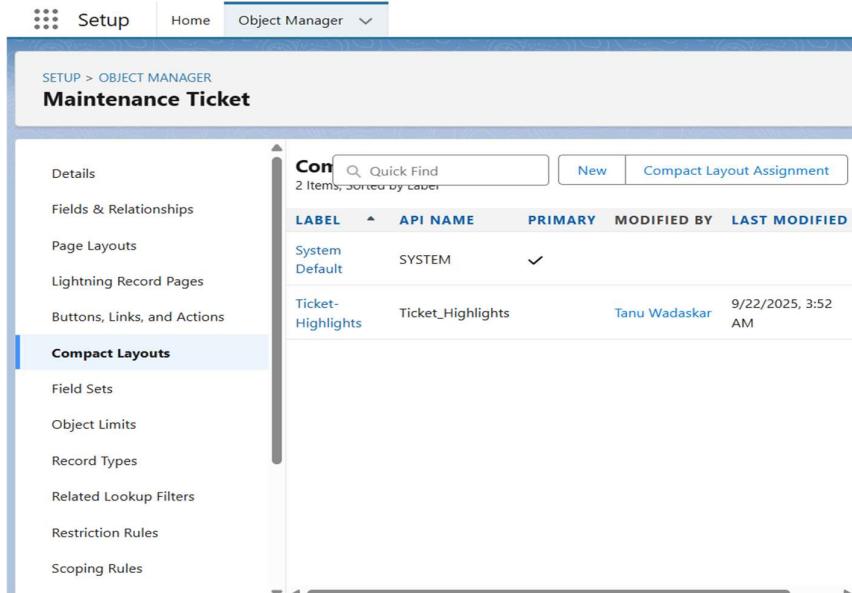
LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Listing-Highlights	Listing_Highlights		Tanu Wadaskar	9/22/2025, 3:48 AM
System Default	SYSTEM			

- 2) Lease:

The screenshot shows the Salesforce Object Manager interface for the 'Lease' object. The left sidebar has a 'Compact Layouts' section selected. The main area displays a table of compact layouts:

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Lease-Highlights	Lease_Highlights		Tanu Wadaskar	9/22/2025, 3:50 AM
System Default	SYSTEM			

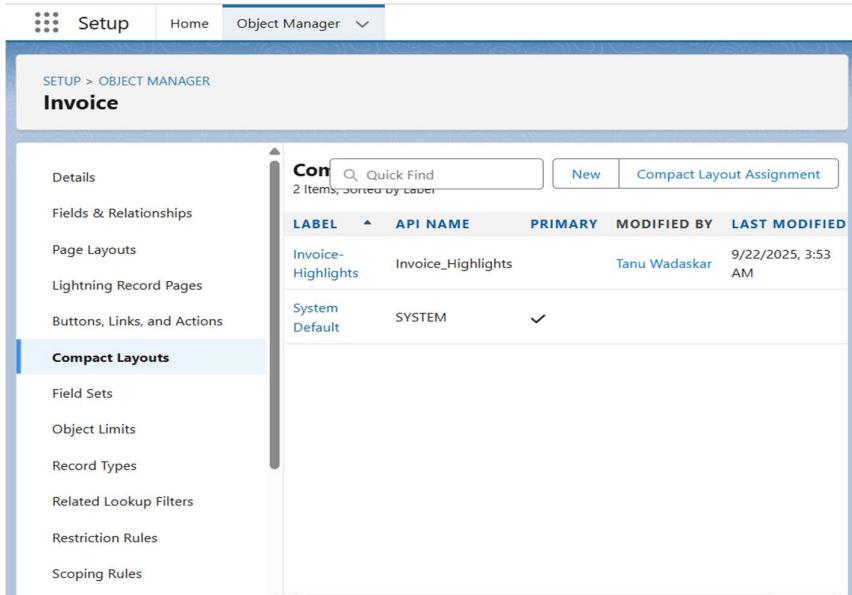
3) Maintenance Ticket:



The screenshot shows the Salesforce Object Manager interface for the Maintenance Ticket object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts (which is selected). The main content area displays a table of compact layouts. The table has columns for Label, API Name, Primary, Modified By, and Last Modified. It shows two items: 'System Default' (Label: System, API Name: SYSTEM) and 'Ticket-Highlights' (Label: Ticket-Highlights, API Name: Ticket_Highlights, Modified By: Tanu Wadaskar, Last Modified: 9/22/2025, 3:52 AM).

Label	API Name	Primary	Modified By	Last Modified
System Default	SYSTEM	✓		
Ticket-Highlights	Ticket_Highlights		Tanu Wadaskar	9/22/2025, 3:52 AM

4) Invoice:



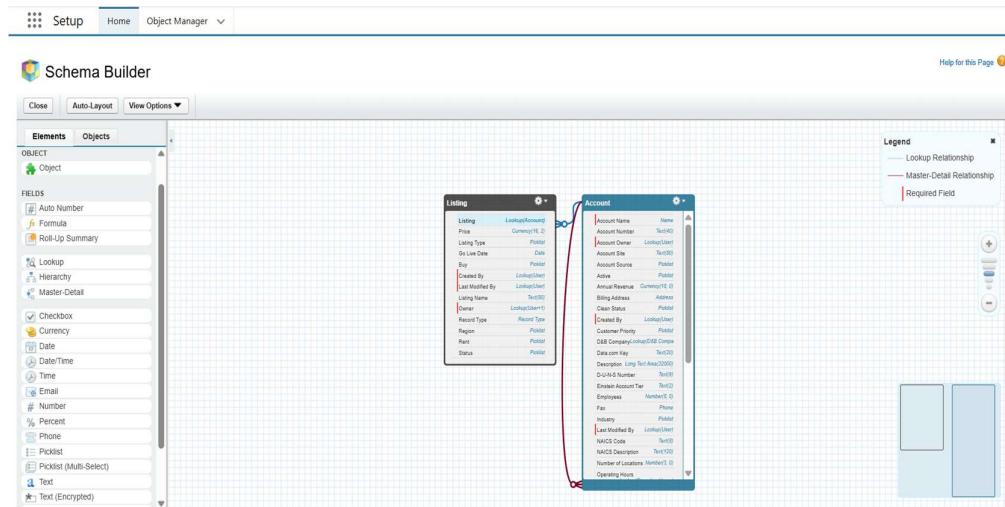
The screenshot shows the Salesforce Object Manager interface for the Invoice object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts (which is selected). The main content area displays a table of compact layouts. The table has columns for Label, API Name, Primary, Modified By, and Last Modified. It shows two items: 'Invoice-Highlights' (Label: Invoice-Highlights, API Name: Invoice_Highlights, Modified By: Tanu Wadaskar, Last Modified: 9/22/2025, 3:53 AM) and 'System Default' (Label: System, API Name: SYSTEM).

Label	API Name	Primary	Modified By	Last Modified
Invoice-Highlights	Invoice_Highlights		Tanu Wadaskar	9/22/2025, 3:53 AM
System Default	SYSTEM	✓		

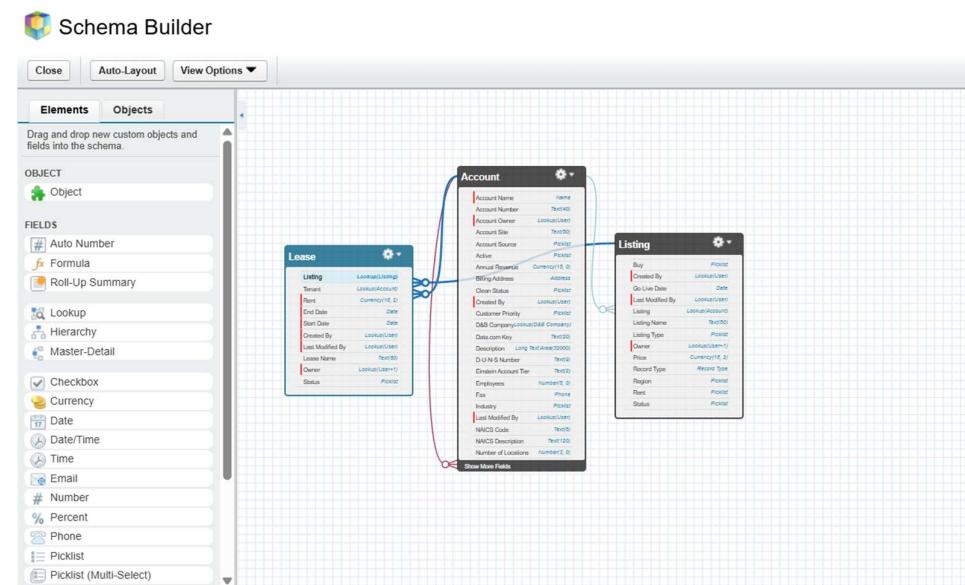
● Schema Builder:

- Schema Builder is the visual canvas used to design and document the data model, showing objects, fields, required marks, and lookup/master-detail lines at a glance for clean screenshots.
- It was used to add the needed fields and lookups for Listing, Lease, Maintenance Ticket, Invoice, and Account via drag-and-drop, then Auto-Layout was applied to capture a clear relationship diagram for the report.

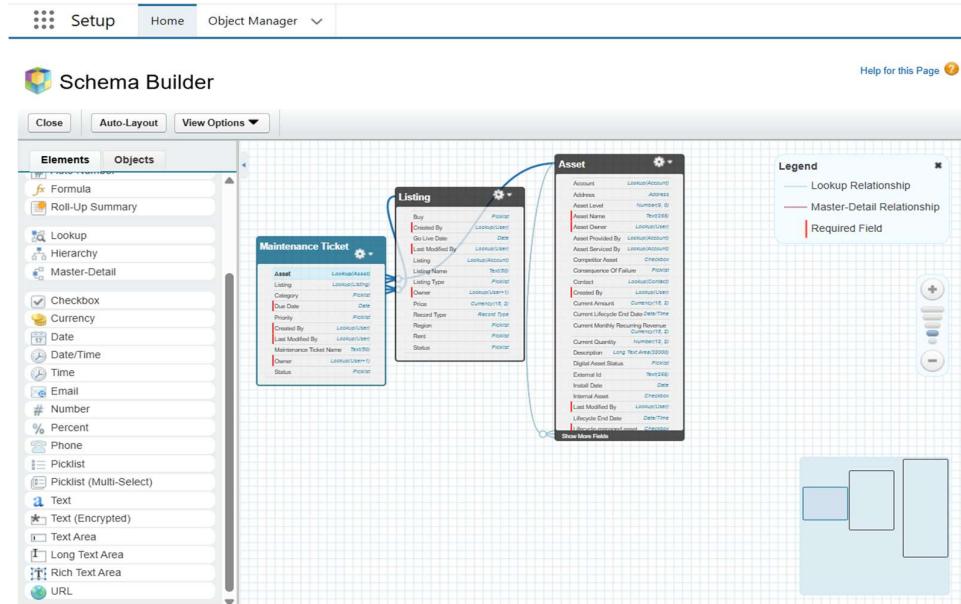
1) Listing:



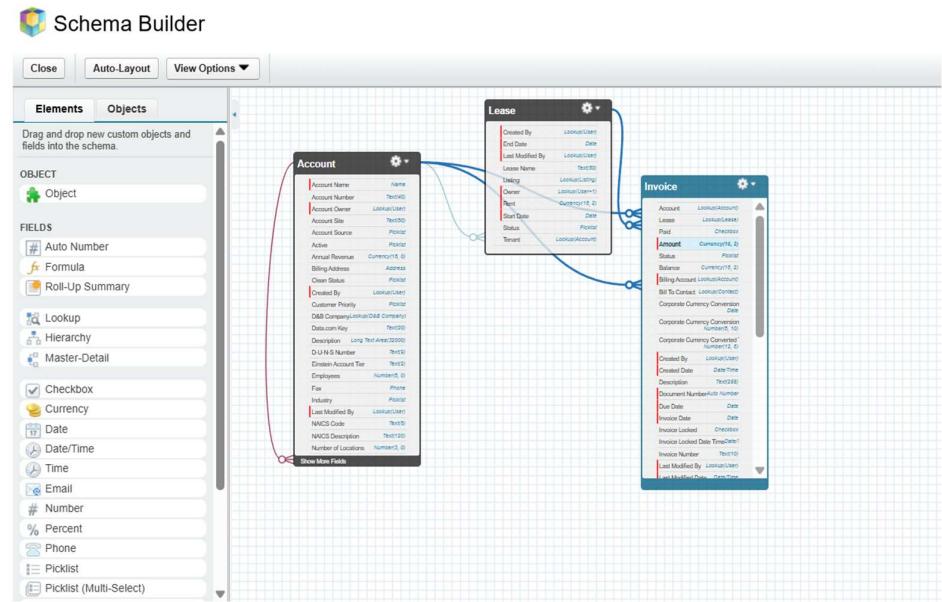
2) Lease:



3) Maintenance Ticket:



4) Invoice:



- **Lookup vs Master-Detail vs Hierarchical Relationships**
 - **Lookup:** Lease -> Listing and Invoice -> Account links are flexible associations where the child keeps its own owner/sharing and can exist without the parent; used for optional references and independent access.
 - **Master-Detail:** Invoice -> Lease was converted so every Invoice depends on a Lease, inherits owner/sharing, deletes with its parent, and enables roll-up summaries on Lease for totals/counts.
 - **Hierarchical:** On User, “HR Manager” (lookup to User) with Child Relationship Name “HR_Reports” creates a user-to-user link so a manager’s record shows the related “HR Reports” list.
- **Junction Objects** (Not applicable for this build)
- **External Objects** (Not applicable because data is stored inside Salesforce.)

