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

Phase 3: Data Modeling & Relationships

Goal: Define the Salesforce data structure (objects, fields, and relationships) to support property listings, customers, and deals.

1. Standard Objects to Use

- Lead → Captures inquiries from potential buyers.
- Contact → Stores customer information after conversion.
- Account → Represents a corporate buyer (optional).
- Opportunity → Represents potential deals.
- Campaign → Marketing initiatives (ads, email, events).

2. Custom Objects to Create

1. Property__c
- Stores property listings.
Fields:
  - Property Name (Text)
  - Property Type (Picklist: Villa, Apartment, Plot, Commercial)
  - Location (Text)
  - Price (Currency)
  - Status (Picklist: Available, Under Offer, Sold)
  - Size (Number, sq.ft)
  - Assigned Agent (Lookup → User)
  - Branch (Picklist or Lookup → Branch)

2. SiteVisit__c
- Tracks scheduled property visits.
Fields:
  - Visit Date (Date/Time)
  - Status (Picklist: Scheduled, Completed, Canceled)
  - Feedback (Long Text Area)
  - Linked Property (Lookup → Property__c)
  - Linked Lead/Contact (Lookup → Lead/Contact)
  - Assigned Agent (Lookup → User)

3. InterestedProperty__c (optional junction object if multiple interests per lead)
- Links Leads to multiple Properties.

3. Relationships

- Lead → Interested Property (Lookup or junction).
- Opportunity → Property (Lookup).
- Site Visit → Property & Lead/Contact (Lookup).
- User → Property/Site Visit (Lookup for Assigned Agent).

4. Record Types

- Property__c: Residential (Villa, Apartment, Plot) and Commercial (Office, Retail, Warehouse).
- Opportunities: Primary Sale and Resale.

5. Page Layouts

- Property Layout: show details + Related Lists (Leads, Opportunities, Site Visits).
- Site Visit Layout: show property + customer info + visit status.
- Lead Layout: include "Interested Property" field.

6. Compact Layouts (Mobile)

- Property: Name, Location, Price, Status.
- Site Visit: Date, Property, Status.

7. Schema Builder

Use Setup → Schema Builder to visualize how Property, Site Visit, Leads, and Opportunities connect. This ensures clarity for team and stakeholders.

Outcome of Phase 3: A complete data model where Properties, Customers, Leads, and Deals are linked, enabling full visibility of customer interest and property lifecycle.

Phase 4: Process Automation (Admin)

Goal: Automate repetitive tasks in Salesforce to improve efficiency for agents, managers, and customers.

1. Validation Rules

- Ensure data accuracy.
- Examples:
  • Property Price > 0 → Formula: Price__c <= 0 → Error: 'Property price must be greater than zero.'
  • Site Visit Date cannot be in the past → Formula: Visit_Date__c < TODAY().

2. Flows

- Record-Triggered Flow: Auto-create Opportunity when Lead status = 'Interested' and Interested Property is filled.
- Auto-create Task for Agent after a Site Visit is logged.
- Send Email Alerts for visit confirmations and deal updates.

3. Approval Processes
- Discounts or special deal approvals are routed to the Sales Manager.
- Approval steps: Agent → Manager → Director (optional for high-value deals).

4. Notifications
- Push in-app notification when new Hot Leads are assigned.
- Email alerts for property status changes (e.g., Property marked as Sold).

Outcome of Phase 4: A fully automated workflow for property sales, site visits, lead nurturing, and deal conversion, reducing manual work for agents and ensuring faster response to customers.