# 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.