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

**This is the output of my Project and Demo steps of my project**

**Set Up Custom Fields**: In Setup > Object Manager > Lead/Opportunity, add fields like Property ID (Text), Property Name (Text), Source (Picklist: Portal, Ads, Referral).

1. **Create Lead (Simulate Portal)**: In Sales app > Leads > New, enter dummy data (e.g., Name: John Doe, Property: NYC Apartment, Source: Portal, Status: New). For real integration, use Web-to-Lead.
2. **Update Lead Status**: Edit Lead > Change Status to Working, then Qualified.
3. **Convert Lead**: On Lead record, click Convert > Map to Contact/Account/Opportunity (e.g., Opportunity Name: NYC Deal, Stage: Prospecting, Amount: $500K).
4. **Add Engagement**: In Opportunity > Related > New Task/Event (e.g., Site Visit). Set up Flow: Setup > Flow Builder > New Record-Triggered Flow on Lead > Add Send Email action.
5. **Build Reports**: Reports > New Report on Leads/Opportunities > Add charts (e.g., Leads by Source: Pie chart grouped by Source).
6. **Create Dashboard**: Dashboards > New > Drag reports as components (e.g., Conversion Rate bar graph). Add dummy data for visuals.

