SALESFORCE PROJECT

PROJECT TITTLE :RealEstate CRM (Property & Agent Management)

PROBLEM: Real estate firms struggle with property listings, agent performance, and client leads. Solution

Phase 10: Final Presentation & Demo Day

A. Pitch Presentation

Goal: Clearly communicate the problem, solution, and value of your CRM.

Suggested Slide Flow:

1. **Introduction**
   - Company / Project Name: *Real Estate CRM*
   - Your Role: Admin/Developer
   - Overview: Challenges in property, agent, and client management
2. **Problem Statement**
   - Highlight pain points:
     - Manual tracking of properties & visits
     - No automated lead follow-ups
     - Difficult reporting for agent performance
3. **Solution**
   - Salesforce-based CRM
   - Key objects: Property, Agent, Client, Deal, Contract
   - Automation: Flows for reminders, auto-generated property references
   - LWC Portal: Lead capture and property search
   - Integration: Google Maps & e-signature

4. **Phase Overview**
   - Brief on Phases 1–9: Requirements, Setup, Data Modeling, Automation, Apex, UI, Integration, Data Management, Reporting & Security
5. **Key Features Demo**
   - Automated Property Reference
   - Scheduled Visit Reminders
   - Lead capture via portal
   - Property search with map visualization
   - Deal & Contract automation
   - Agent performance dashboard
6. **Technical Highlights**
   - Record-Triggered Flows, Scheduled Flows, Screen Flows
   - Apex triggers for advanced automation
   - LWC components: PropertySearch, PropertyMap, LeadForm
   - Integrations: Google Maps, DocuSign
   - Data deployment via Change Sets/SFDX
7. **Impact / Metrics**
   - Faster lead follow-ups
   - Reduced manual data errors
   - Improved agent performance visibility
8. **Next Steps / Future Enhancements**
   - Mobile-first portal
   - AI recommendations for property matching
   - Analytics with Einstein / Tableau CRM

B. Demo Walkthrough

Step-by-Step Demo Script:

1. **Property Creation**
   - Create a new Property
   - Show auto-generated Property_Ref__c
2. **Client Lead Capture**

  - Submit lead via portal or screen flow
  - Show Client__c and Deal__c creation
3. **Visit Scheduling & Reminders**
   - Schedule a visit for a client
   - Demonstrate scheduled flow sending reminder task/email
4. **Deal & Contract Workflow**
   - Update Deal Stage → Closed Won
   - Show Contract auto-creation
   - Trigger DocuSign e-signature flow
5. **Property Search**
   - Search properties in LWC portal
   - Show filters, map, and property detail navigation
6. **Reporting & Dashboards**
   - Open Sales Pipeline dashboard
   - Show Agent performance metrics
   - Filter dynamic dashboard by logged-in agent
7. **Security & Sharing**
   - Show restricted access to Deal__c or Client__c for a normal agent
   - Show manager view with broader visibility

C. Handoff Documentation

Contents:

- Object schema & ERD
- Record Types & Page Layouts
- Automation flows, validation rules, approval processes
- Apex triggers & classes
- LWC components & usage guide
- Integration setup (Named Credentials, External Services)
- Deployment instructions (Change Sets, SFDX, ANT)
- Reports & Dashboards list

- Security settings (Profiles, Permission Sets, OWD, Sharing Rules)

Format: PDF or Confluence page for internal handoff

D. LinkedIn / Portfolio Project Showcase

Tips:

- Highlight **problem, solution, and impact**
- Include **screenshots of dashboards, LWCs, flows**
- Add a **short video demo** if possible
- Mention **technologies used:** Salesforce (Flows, Apex, LWC, Dashboards, Integrations)