

SALESFORCE PROJECT

PROJECT TITLE :RealEstate CRM (Property & Agent Management)

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

A. Validation Rules

Purpose: Ensure data integrity and enforce business rules.

Object name: **Property**

The screenshot shows the Salesforce Setup interface for the 'Property' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Validation Rule Edit' and includes a 'Rule Name' field with the value 'Property_Price__c', an 'Active' checkbox that is checked, and a 'Description' field. Below these fields is the 'Error Condition Formula' section, which contains an example formula 'Discount_Percent__c > 0.30' and a description: 'Display an error if Discount is more than 30%. If this formula expression is true, display the text defined in the Error Message area.' The formula editor shows the formula 'Property_Price__c < 0' with a red squiggly line under the 'c' in 'Property_Price__c'. To the right of the formula editor is a 'Functions' dropdown menu with a list of functions: ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. Below the list is an 'Insert Selected Function' button. At the bottom of the functions list, there is a description for the ABS function: 'ABS(number) Returns the absolute value of a number, a number without its sign'.

Property Price: Price__c < 0

B. Workflow Rules (Legacy – but still in use)

Use Case: Simple time-based notifications.

1. Deal Stage = Negotiation → Email Alert

- Criteria: Stage = Negotiation
- Action: Email alert to Sales Manager.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Workflow Rules' and a 'Process Automation' section with 'Workflow Rules' highlighted. The main content area is titled 'Edit Rule Deal_Negotiation_Email' and shows 'Step 3: Specify Workflow Actions'. It includes a table for 'Immediate Workflow Actions' with one action: 'Notify_Sales_Manager' (Email Alert). A message at the bottom states: 'No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.'

Property Status = Sold → Field Update

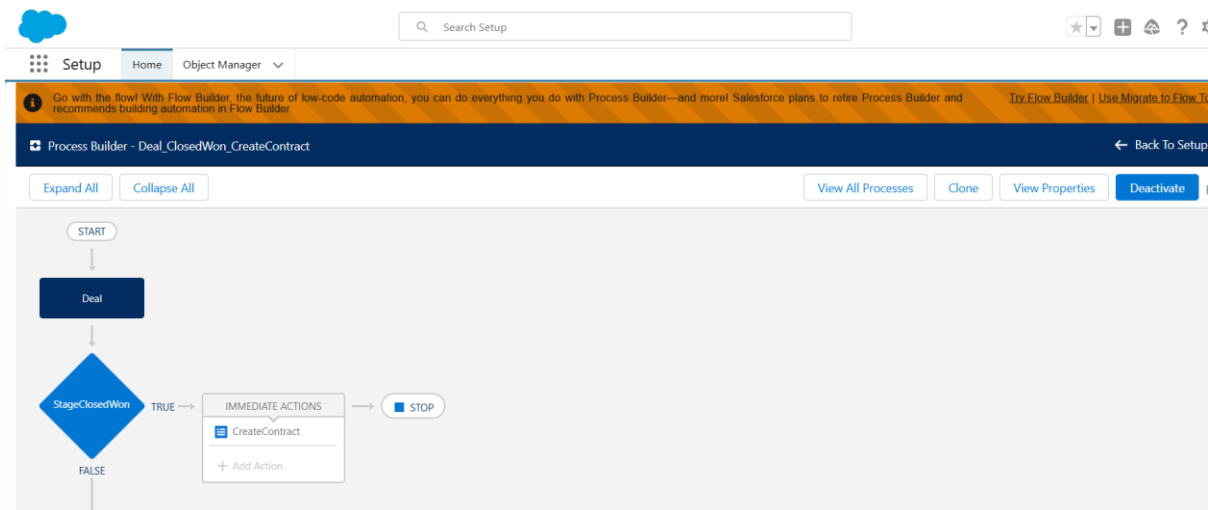
- Criteria: Status = Sold
- Action: Update related Deal.Status = Closed Won.

The screenshot shows the Salesforce Setup interface for the 'Property_Sold_Deal_Update' workflow rule. The left sidebar has a search bar with 'Workflow Rules' and a 'Process Automation' section with 'Workflow Rules' highlighted. The main content area is titled 'Property_Sold_Deal_Update' and shows 'Workflow Rule Detail'. It includes a table for 'Immediate Workflow Actions' with one action: 'Update_Deal_Status' (Field Update). A message at the bottom states: 'Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder.'

C. Process Builder (being deprecated, but useful to explain)

Use Case: Automate actions across objects.

- **Example: When a Deal is Closed Won → Create Contract record**
 - Criteria: [Deal.Stage = Closed Won]
 - Immediate Actions: Create a Contract__c linked to the Deal.



D. Approval Process

Use Case: Ensure high-value deals are manager-approved before finalizing.

- **Object:** Deal__c
- **Criteria:** Amount > ₹50,00,000 (or \$50,000)
- **Steps:**
 1. Submit for approval → goes to Sales Manager.
 2. If approved → Stage moves to “Negotiation Approved”.
 3. If rejected → Deal remains in “Negotiation”.

The screenshot shows the Salesforce Setup interface for Approval Processes. The left sidebar includes a search bar for 'Approval Processes' and a navigation menu with 'Process Automation' and 'Approval Processes' (highlighted). The main content area is titled 'Approval Processes' and shows details for a specific process: 'Deal: High_Value_Deal_Approval'. Below the title is a 'Process Definition Detail' section with fields for Process Name, Unique Name, Description, Entry Criteria, Record Editability, Approval Assignment Email Template, Initial Submitters, and Created By. To the right of these fields are buttons for 'Edit', 'Clone', and 'Delete', and an 'Active' checkbox. Below this is an 'Initial Submission Actions' section with a table showing 'Record Lock' as an action. At the bottom is an 'Approval Steps' section with a 'New Approval Step' button.

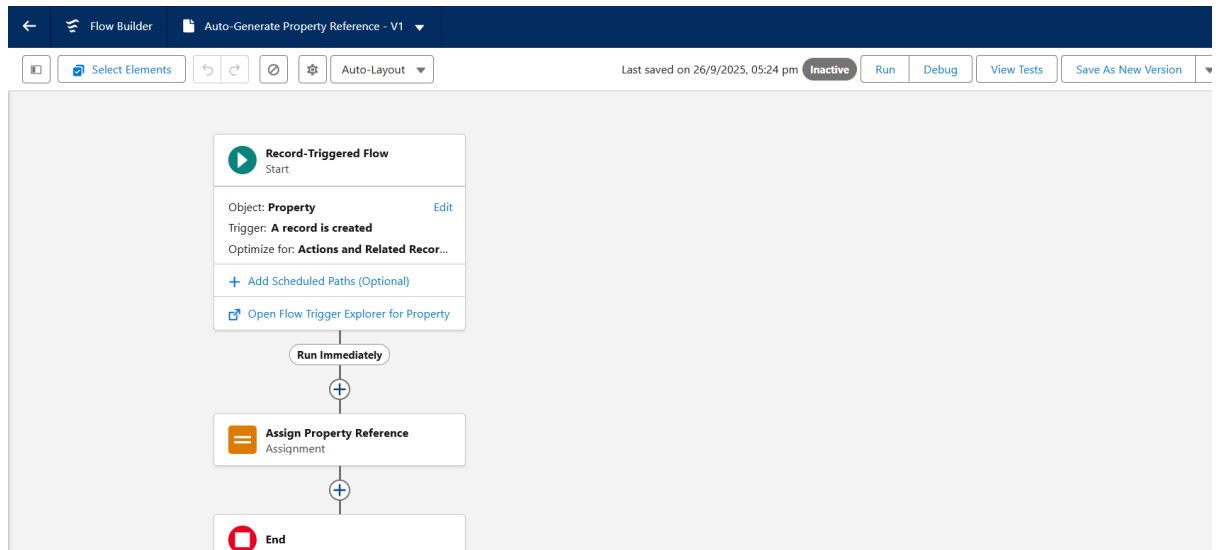
This screenshot shows the 'Approval Steps' section of the Salesforce Setup interface. It displays a message: 'You have not yet defined any approval steps'. Below this is a 'Final Approval Actions' section with a table listing actions: 'Edit' (Record Lock) and 'Edit | Remove' (Field Update). Below that is a 'Final Rejection Actions' section with a table listing actions: 'Edit' (Record Lock) and 'Edit | Remove' (Field Update). At the bottom is a 'Recall Actions' section with a table listing actions: 'Record Lock'. The interface includes a 'Back To Top' link and a footer note: 'Always show me fewer / more records per related list'.

E. Flow Builder (recommended approach)

Flows are the **future of Salesforce automation**. Let's design the key flows:

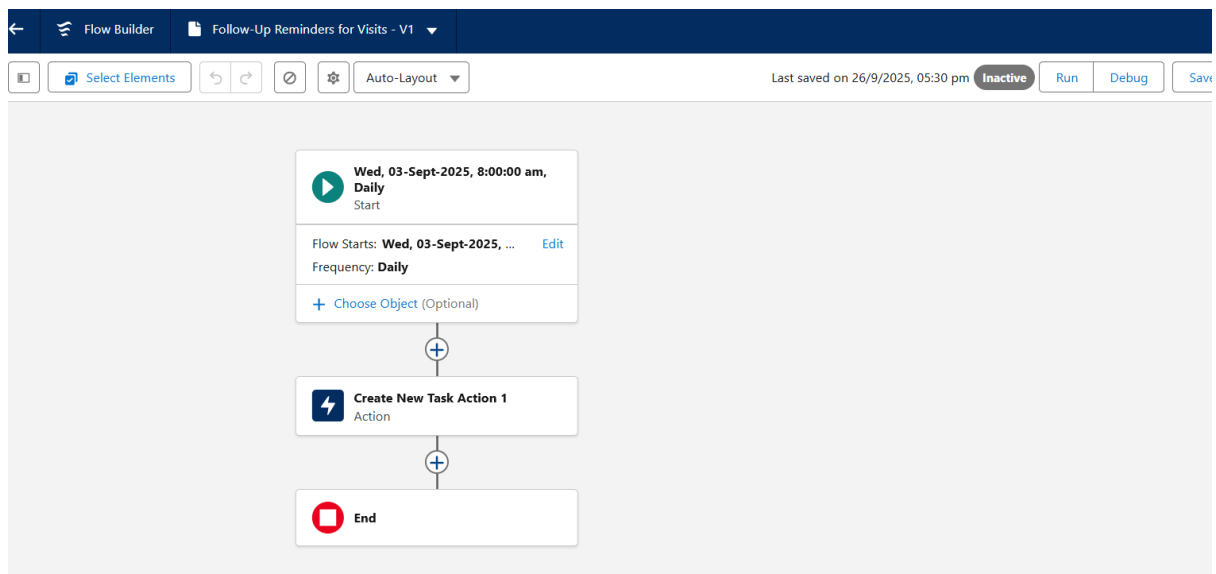
1. Record-Triggered Flow → Auto-Generate Property Reference

- Object: Property__c
- Trigger: On Create
- Action: Set Property_Ref__c = "PROP-{ Year}-{ AutoNumber} ".



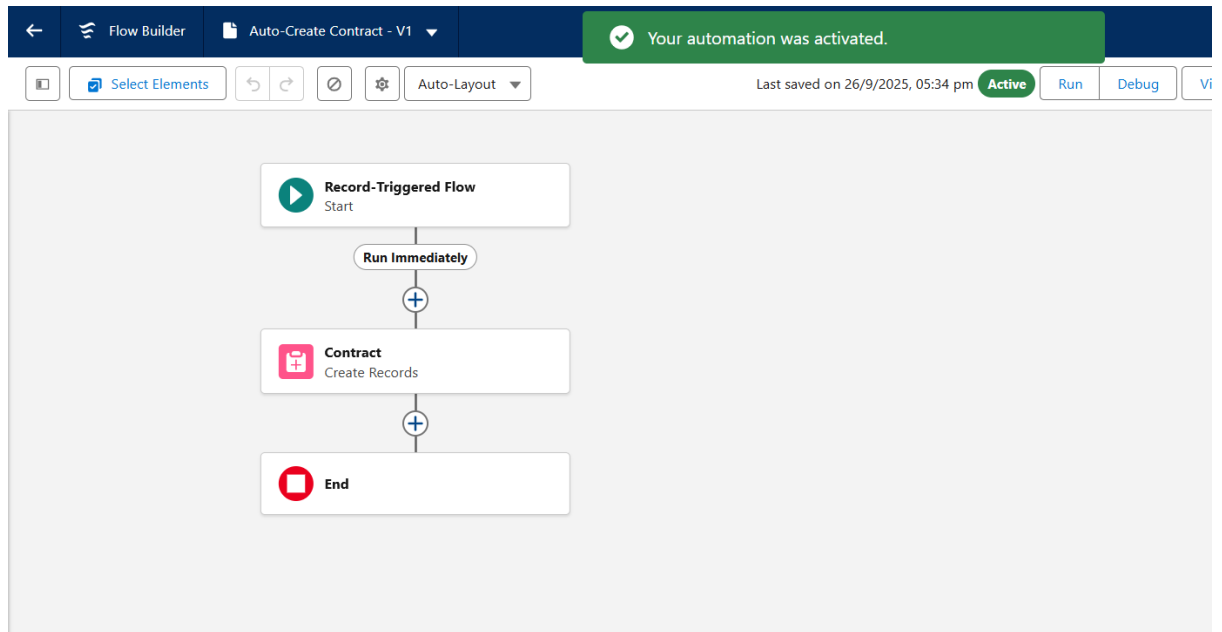
2. Scheduled Flow → Follow-Up Reminders for Visits

- Object: Visit__c
- Schedule: Daily, 8 AM
- Criteria: Visit Date = Tomorrow
- Action: Create Task + Send Email Alert to Agent:
 - Subject: "Reminder: Visit scheduled tomorrow for [Property__c]."



3. Record-Triggered Flow → Deal Won → Auto-Create Contract

- Object: Deal__c
- Trigger: On Update
- Criteria: Stage = Closed Won
- Action: Create Contract__c with Status = Draft, linked to Deal.



4. Screen Flow → Client Lead Capture Form

- Used in **Experience Cloud** portal.
- Captures: Name, Email, Phone, Preferred City, Budget.
- Creates: Client__c + Deal__c (Stage = Lead).
- Sends: Confirmation email to Client.

F. Email Alerts

- **New Client Created** → Email to Assigned Agent.
- **Visit Scheduled Tomorrow** → Reminder to Client + Agent.
- **Deal Closed Won** → Email Finance team with Deal + Contract info.

