SALESFORCE PROJECT

PROJECT TITTLE :RealEstate CRM (Property & Agent Management)

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

Phase 1: Problem Understanding & Industry Analysis

A)Requirements

- CRUD for Property, Client, Deal, Contract, and Visits.
- Agent profiles with quotas/regions.
- Track client leads, preferences, contact history.
- Deal pipeline management (Stage, Amount, Close Date).
- Auto-generate Property Reference Number.
- Schedule & log property visits with automated reminders.
- Property search & map view via LWC + Google Maps.
- Reports & dashboards: pipeline, revenue, visits → conversion.
- Role-based access: Agents see own deals; Managers see teams.
- REST endpoints for external apps.

B)Stakeholders & Responsibilities

Primary:

- Sales Manager — dashboards, pipeline, agent metrics.
- Agents — manage leads, visits, deals.
- Marketing — lead attribution & conversion.
- Operations/Admin — setup, data quality.
- Finance — contract values & revenue reporting.
- IT/Integrations — API keys & secure access.

Secondary: Legal, Customer Support, Executive Sponsor.

C)Business Process (Lead → Deal → Contract)

1. **Lead Capture:** Client submits inquiry via portal → System creates Client + Deal (Stage = Lead).
2. **Lead Qualification:** Agent reviews lead → schedules visit; system sets follow-up reminders.
3. **Property Visit:** Agent logs outcome → If Interested → move Deal to Visit Scheduled → Negotiation.
4. **Negotiation:** Agent updates Deal Amount/Stage → document negotiation notes.
5. **Contracting:** Admin generates Contract, uploads agreement, initiates e-sign → on completion, Deal Stage = Closed Won.

D)Industry-specific Use Case Analysis

Use Case 1 — Quick property assignment for a new lead

Actors: Client, Agent
Flow: Client requests viewing → system creates lead → auto-assign to Agent based on region → Agent gets task + calendar invite → follow-up reminders created 24 hours before visit.
Acceptance criteria: Lead record plus Deal created; assigned agent receives task & calendar