SALESFORCE PROJECT

PROJECT TITTLE :RealEstate CRM (Property & Agent Management)

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

Phase 3: Data Modeling & Relationships

A. Standard & Custom Objects

Object	Type	Description
Property__c	Custom	Stores real estate property details.
Agent__c	Custom	Salesforce User-linked object for agents' profiles.
Client__c	Custom	Prospective buyers or tenants.
Deal__c	Custom	Links Client ↔ Property ↔ Agent; tracks stages & amounts.
Contract__c	Custom	Stores contract documents and e-signature status.
Visit__c	Custom	Tracks property visits (date/time, outcome).
Opportunity	Standard	Optional — could map to Deal__c for reporting integration.
User	Standard	System user (Agent, Manager, Admin).

B. Fields per Object

1. **Property__c**

SETUP > OBJECT MANAGER

Property

- 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
- List View Button Layout
- Restriction Rules

Fields & Relationships

14 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Address	Address__c	Text(255)
Bathrooms	Bathrooms__c	Number(18, 0)
Bedrooms	Bedrooms__c	Number(18, 0)
City	City__c	Text(100)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
List Price	List_Price__c	Currency(18, 0)
Owner	OwnerId	Lookup(User,Group)
Property Name	Name	Text(80)

2. **Agent__c**

SETUP > OBJECT MANAGER

Agent

- Details
- **Fields & Relationships**
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts

Fields & Relationships

4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Agent Name	Name	Text(80)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)

3. Client

SETUP > OBJECT MANAGER

Client

- 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
- List View Button Layout
- Restriction Rules

Fields & Relationships

11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Address	Address__c	Text(255)
City	City__c	Text(60)
Client Name	Client_Name__c	Text(255)
Client Name	Name	Text(80)
Created By	CreatedById	Lookup(User)
Email	Email__c	Text(60)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Phone	Phone__c	Number(18, 0) (Unique)

4)Contract

SETUP > OBJECT MANAGER

Contract

- 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
- List View Button Layout
- Restriction Rules

Fields & Relationships

23 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Account Name	AccountId	Lookup(Account)
Activated By	ActivatedById	Lookup(User)
Activated Date	ActivatedDate	Date/Time
Billing Address	BillingAddress	Address
Company Signed By	CompanySignedId	Lookup(User)
Company Signed Date	CompanySignedDate	Date
Contract End Date	EndDate	Date
Contract Name	Name	Text(80)
Contract Number	ContractNumber	Auto Number
Contract Owner	OwnerId	Lookup(User)
Contract Start Date	StartDate	Date

C. Record Types

- **Deal__c Record Types**
  - **Sale Deal** — Residential/commercial properties for purchase.
  - **Rent Deal** — Short-term or long-term rental deals.
- **Property__c Record Types**
  - Residential, Commercial, Land.
- Allows page layouts to be dynamic based on type.

D. Page Layouts

- **Property Layout** — Main details, map, owner info.
- **Agent Layout** — Contact info, deals, regions.
- **Client Layout** — Leads, property interest, assigned agent.
- **Contract Layout** — Linked deal, status, e-sign info.

F. Relationships

Parent Object	Child Object	Relationship Type	Description
Property__c	Deal__c	Lookup	Deal links to property
Client__c	Deal__c	Lookup	Client for deal
Agent__c	Deal__c	Lookup	Assigned agent
Property__c	Visit__c	Lookup	Visits scheduled for property
Client__c	Visit__c	Lookup	Visits logged for client
Agent__c	Visit__c	Lookup	Visits assigned to agent

G. Lookup vs Master-Detail vs Hierarchical Relationships

Type	Use Case	Key Points
Lookup	Client ↔ Deal, Property ↔ Deal	Optional link; child exists independently
Master-Detail	Deal ↔ Contract	Child inherits sharing/ownership; rollups available
Hierarchical	User → User	Not required here; for manager reporting if needed

J. Schema Builder

- Use Salesforce Schema Builder to visualize relationships:
  - Property → Deal → Contract
  - Client → Deal
  - Agent → Deal, Visit
  - Property → Visit