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 \leftrightarrow Property \leftrightarrow Agent; tracks stages & amounts.

Contract_c Custom Stores contract documents and e-signature status.

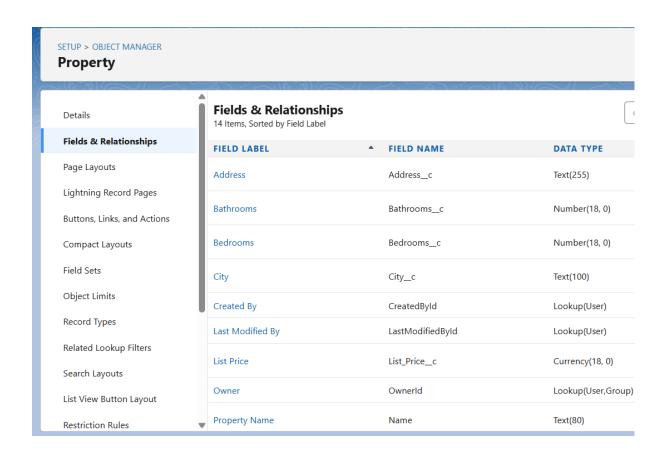
Visit_c Custom Tracks property visits (date/time, outcome).

Opportunity Standard Optional — could map to Deal_c for reporting integration.

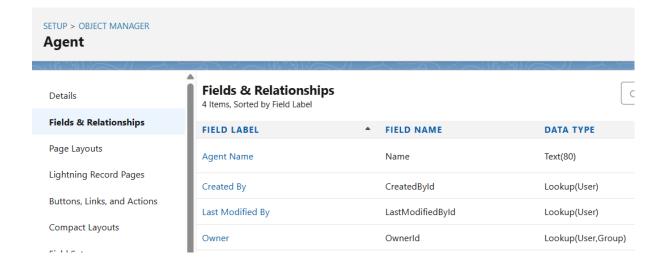
User Standard System user (Agent, Manager, Admin).

B. Fields per Object

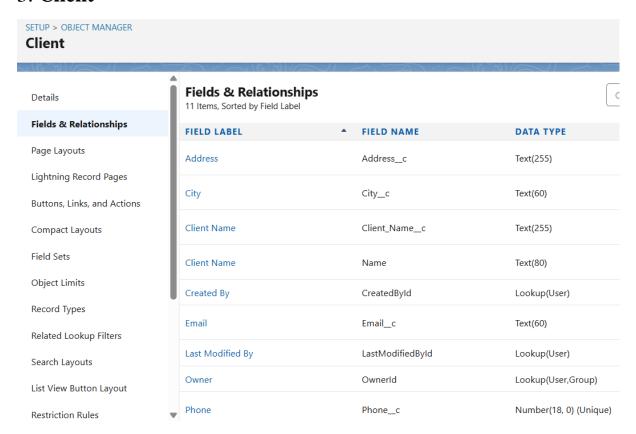
1. Property_c



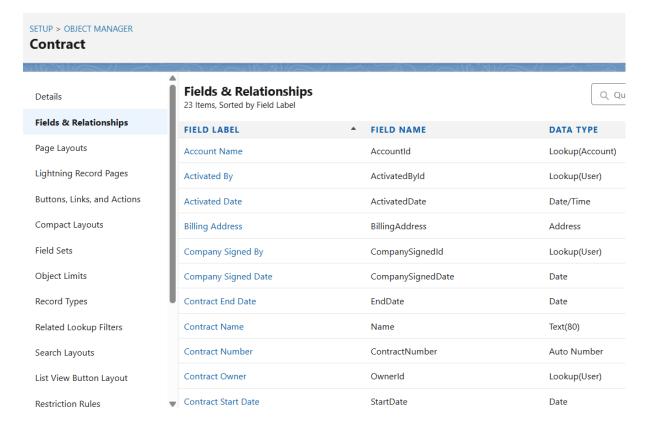
2. **Agent__c**



3. Client



4)Contract



C. Record Types

- Deal_c Record Types
 - o **Sale Deal** Residential/commercial properties for purchase.
 - o **Rent Deal** Short-term or long-term rental deals.
- Property_c Record Types
 - o 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	Dealc	Lookup	Deal links to property
Client_c	Dealc	Lookup	Client for deal
Agent_c	Dealc	Lookup	Assigned agent
Propertyc	Visitc	Lookup	Visits scheduled for property
Client_c	Visitc	Lookup	Visits logged for client
Agent_c	Visitc	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	$Deal \leftrightarrow Contract$	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:
 - \circ Property \rightarrow Deal \rightarrow Contract
 - \circ Client \rightarrow Deal
 - o Agent → Deal, Visit
 - \circ Property \rightarrow Visit