SALESFORCE PROJECT

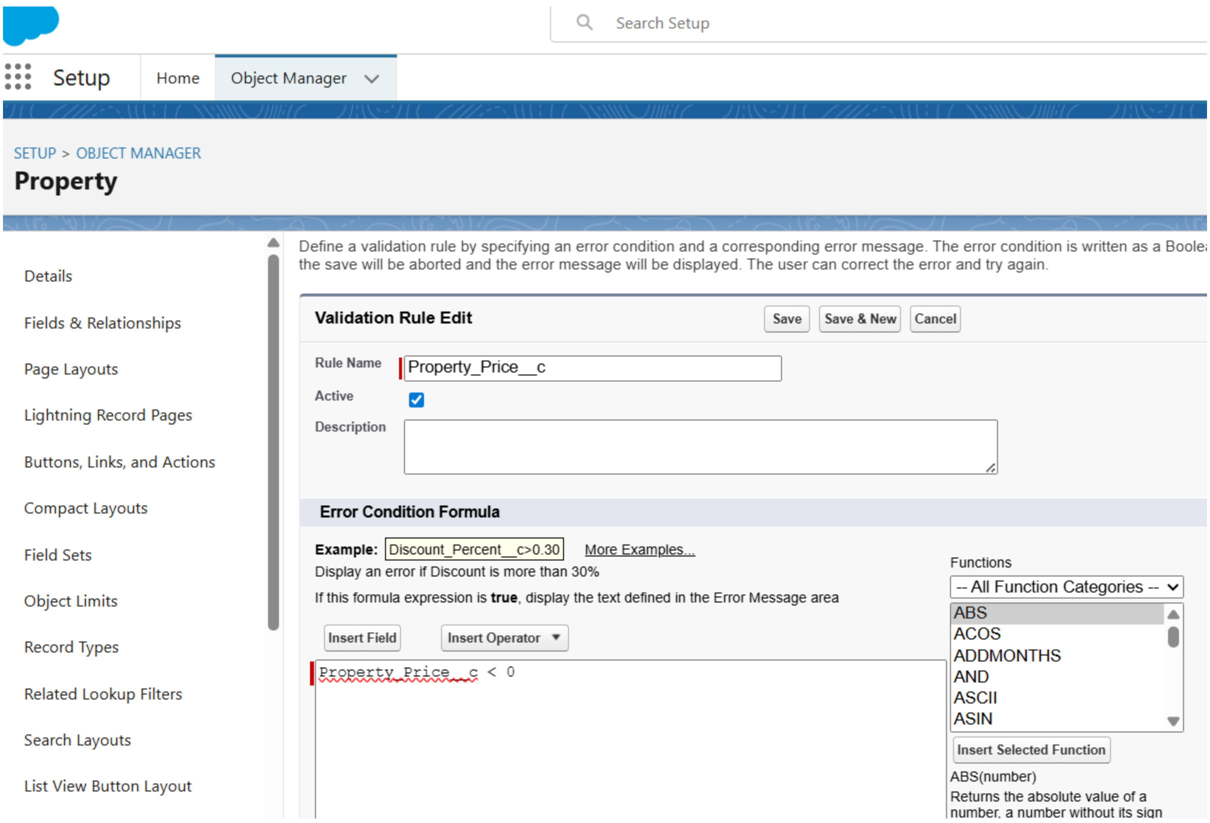
PROJECT TITTLE :RealEstate CRM (Property & Agent Management)

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**



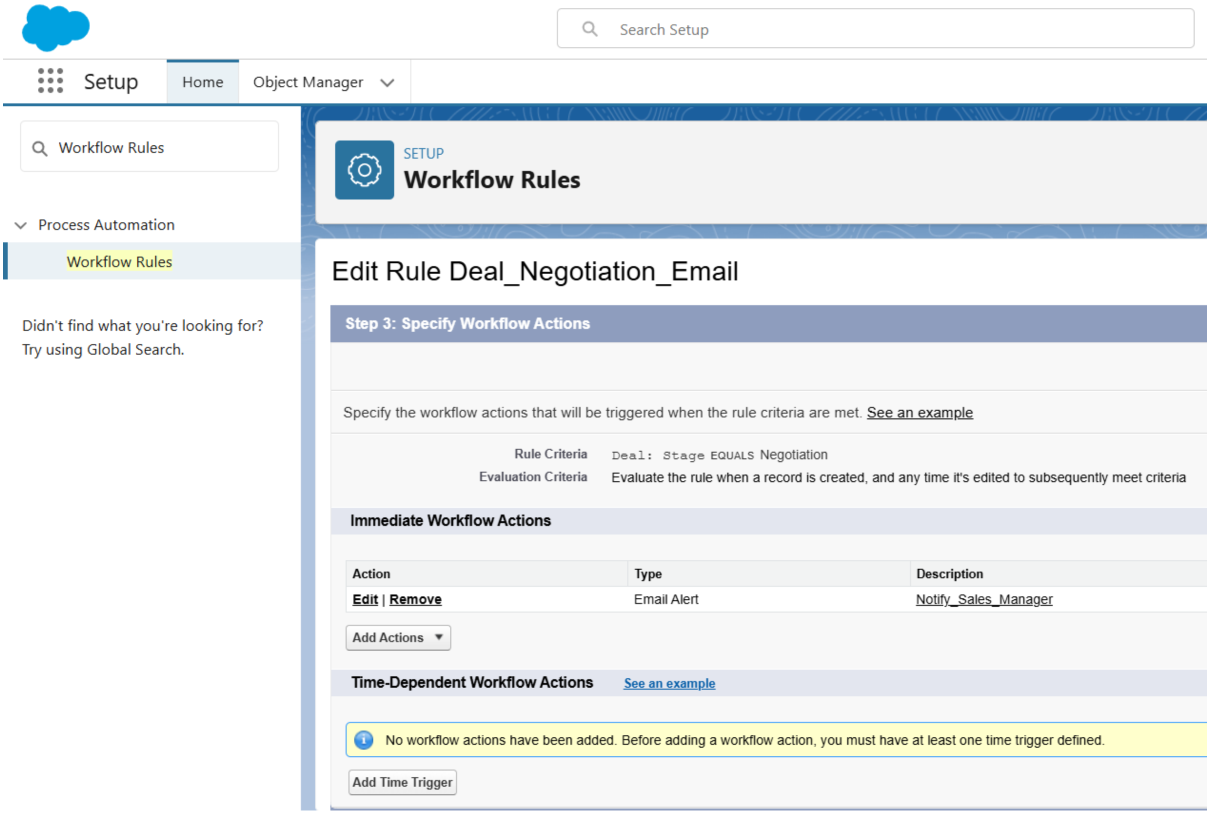
Property Price: Price__c < 0

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

Use Case: Simple time-based notifications.

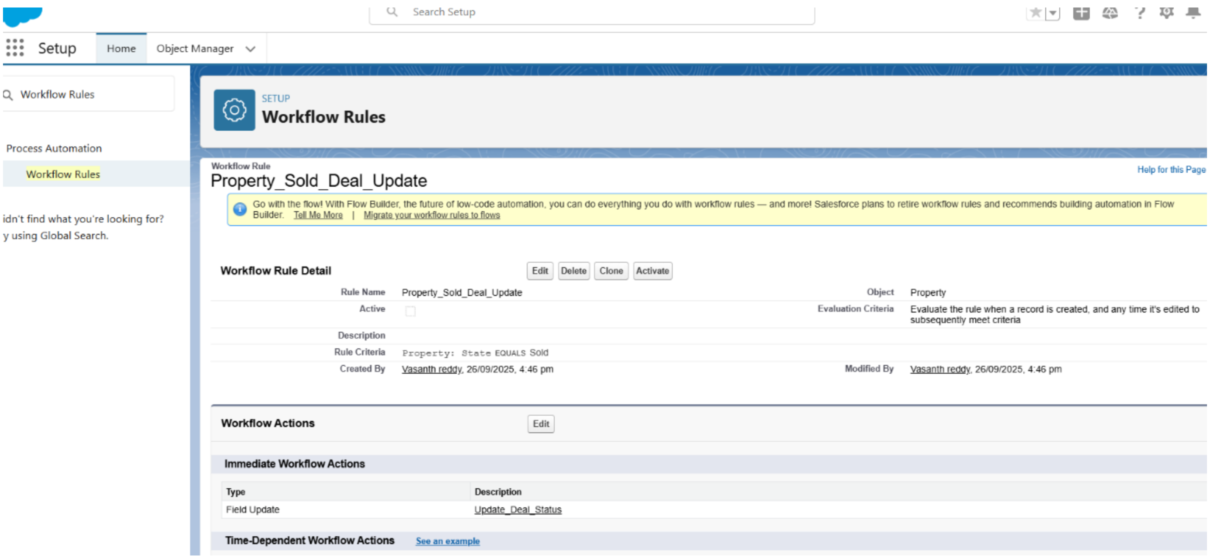
1. **Deal Stage = Negotiation → Email Alert**

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



Property Status = Sold → Field Update

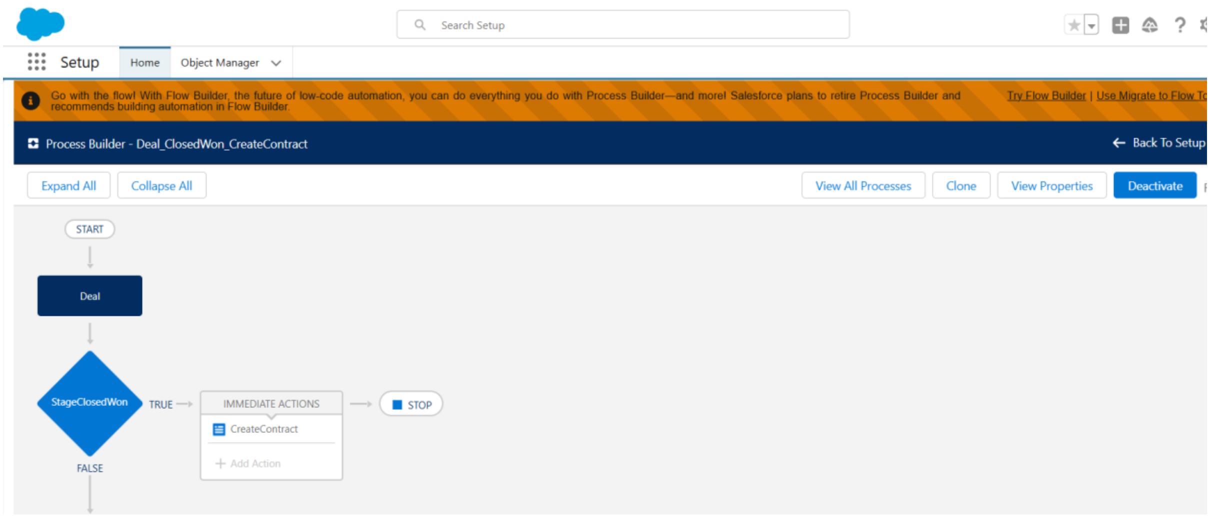
- Criteria: Status = Sold
- Action: Update related Deal.Status = Closed Won.



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

Use Case: Automate actions across objects.

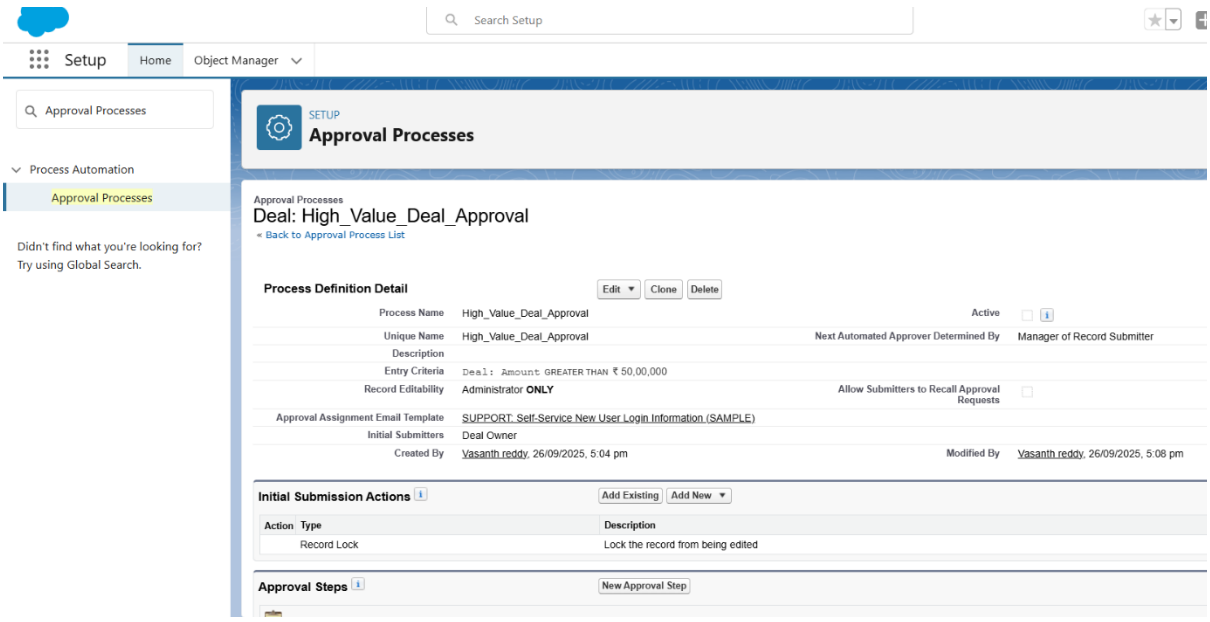
- Example: **When a Deal is Closed Won → Create Contract record**
  - Criteria: [Deal.Stage = Closed Won]
  - Immediate Actions: Create a Contract__c linked to the Deal.

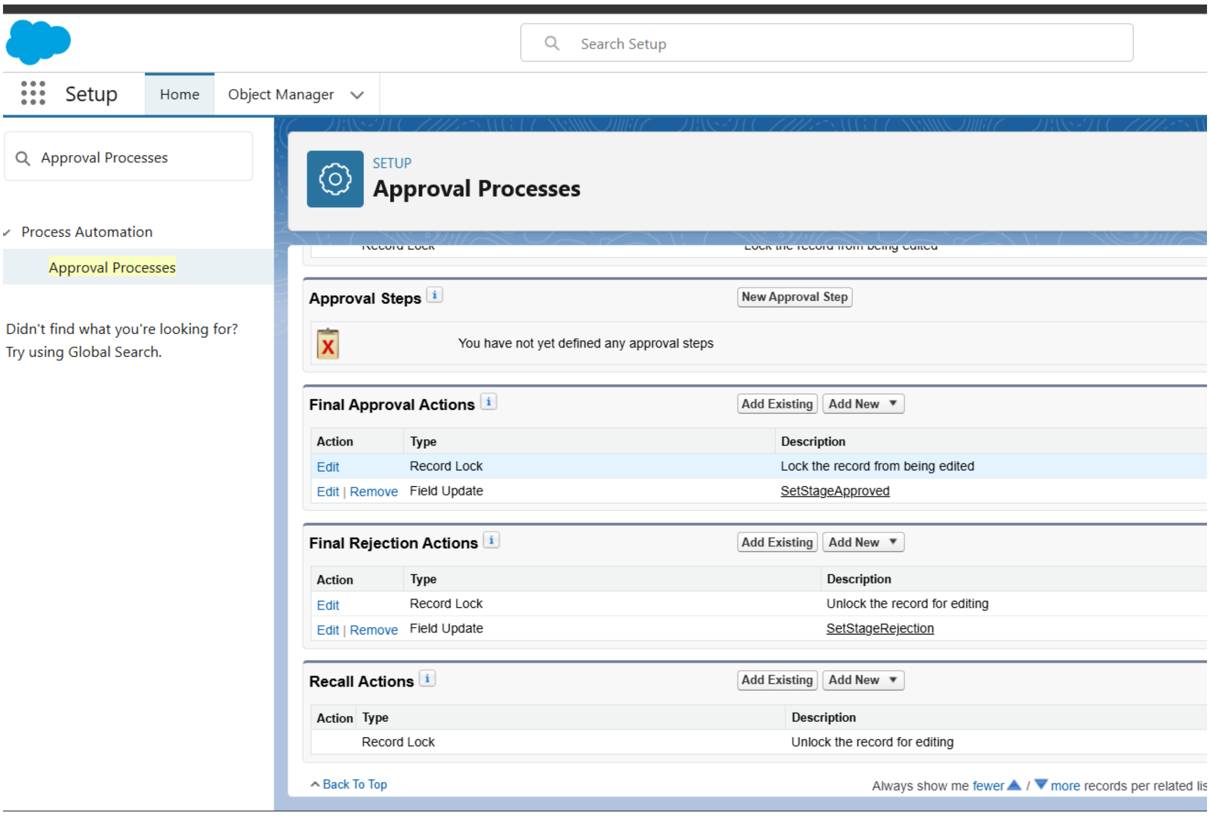


D. Approval Process

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”.

- 

- 

E. Flow Builder (recommended approach)

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

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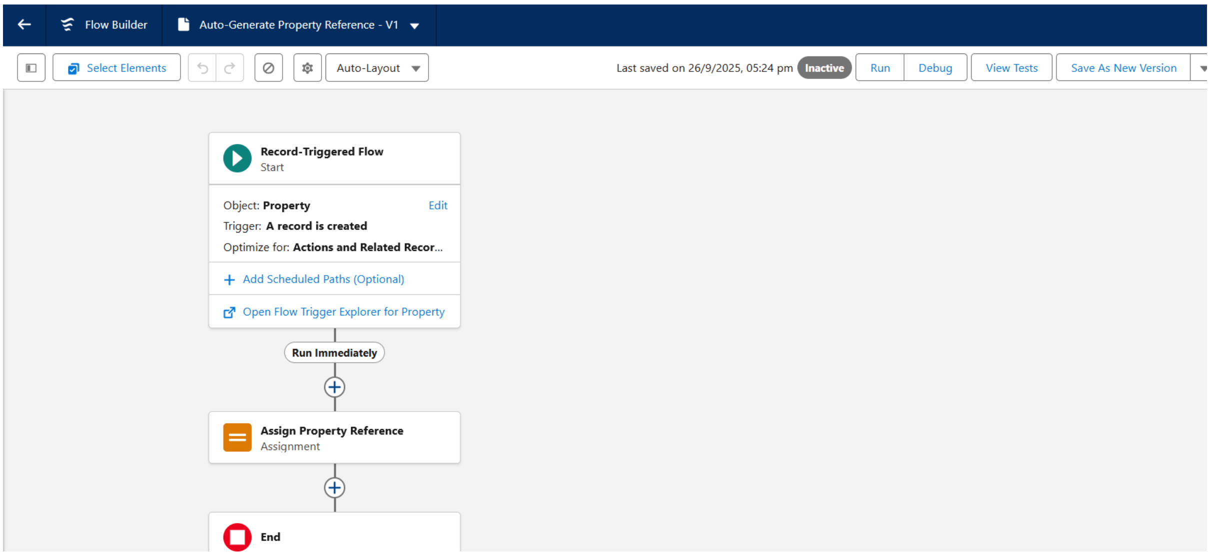
1. Record-Triggered Flow → Auto-Generate Property Reference

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

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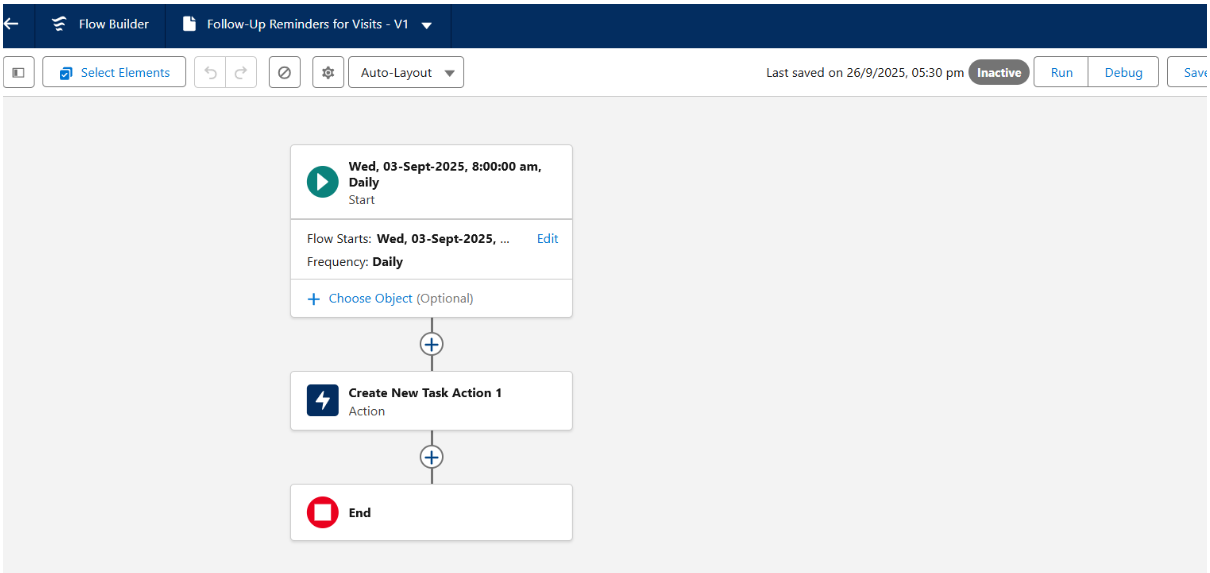
2. Scheduled Flow → Follow-Up Reminders for Visits

- 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].”
- 

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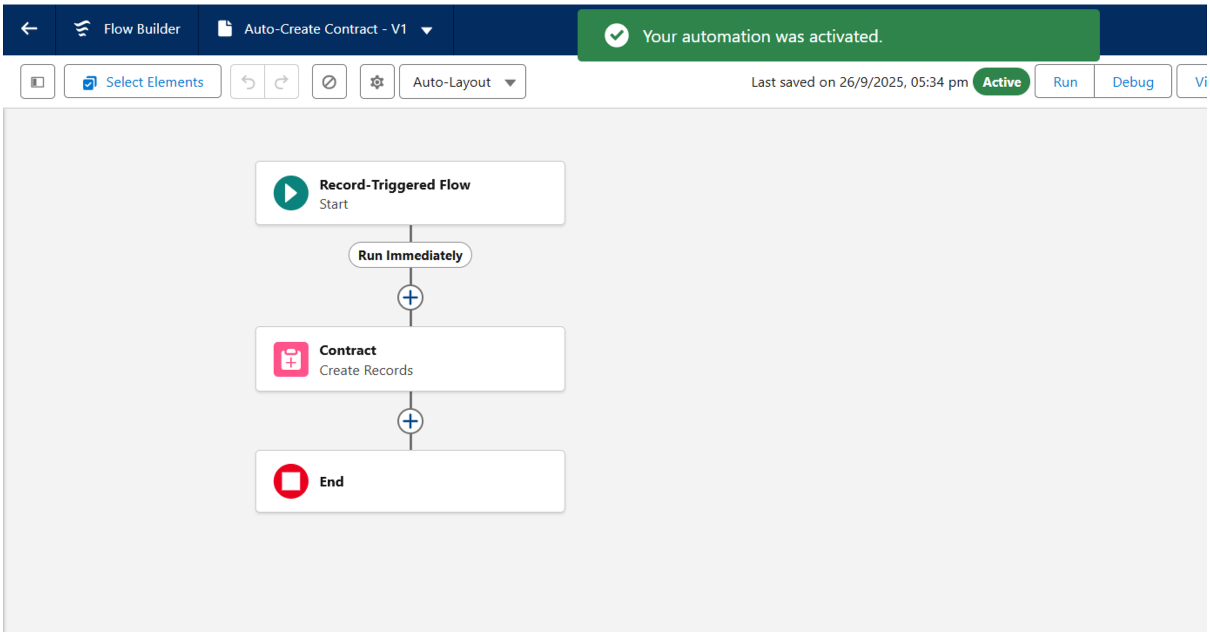
3. Record-Triggered Flow → Deal Won → Auto-Create Contract

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

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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.