

## **I. Project Overview**

### **Company Details:**

ABC Corporation is a real estate based company specializes in developing and Leasing apartments (flats) and shops to customers. They have multiple projects, and each project consists of several buildings. Each building has multiple floors, and on each floor, there are various types of units, such as 1-bedroom (1BHK) flats, 2-bedroom (2BHK) flats, 3-bedroom (3BHK) flats and shops.

Currently, the company receives leads (potential customers) through events, marketing campaigns, and their website. However, they manage these leads offline, which means they store information manually and use different software for different tasks.

## **II. Standard and Custom Objects:**

We have customized the following standard objects in Salesforce:

- o Campaign
- o Lead
- o Account
- o Opportunity

Below is the list of custom objects that we need to create in the system.

- o Project
- o Building
- o Floor
- o Unit
- o Opportunity Unit
- o Real Estate Agent
- o Bank Finance
- o Payment Plan
- o Opportunity Payment Plan
- o Invoice



### **I. Setup Custom Objects:**

Firstly to store projects, buildings, floors, and units details we have to create the below custom objects.

- **Project (Custom):** This object will store details about each of our real estate projects. By using the Project object, we can easily track how many projects we have and see the status of each project, including which ones are completed.

Field Label	Field Type	Pick list Value	Description
Project Name	Text	NA	Stores the name of the project.
Location	Text Area	NA	Stores the location details of the project.
Project Start Date	Date	NA	Defines the start date of the project.
Project Expected Completion Date	Date	NA	Defines the expected completion date of the project.
Area (sqft)	Number	NA	Stores the total area of the project in square feet.
Saleable Area (sqft)	Number	NA	Stores the area that is available for sale in square feet.
Project Type	Picklist	Commercial Residential Industrial Commercial and Residential Infrastructure	Specifies the type of project
No of Buildings	Number	NA	Indicates how many buildings are included in this project.

Related **Details**

Project Name	Al-Ajmal	Type	Leasing Project
Location	1st Street , Al-Ajmal	Area (sqft)	1,00,000
Project Start Date	01/04/2021	Saleable Area (sqft)	80,000
Project Expected Completion Date	01/06/2024	Project Type	Residential
		No of Buildings	1
Created By	 Sana Chaudhary, 24/06/2024, 1:42 pm	Last Modified By	 Sana Chaudhary, 05/07/2024, 12:08 pm

- **Building (Custom):** The Building object will store details about each building and link it to the related project. This will help organize and track building-specific information within each project.

Field Label	Field Type	Pick list Value	Description
Buildings Name	Text	NA	Stores the name of the building.
Project	Lookup (Project)	NA	Links to the related project that the building is part of.
Total Floors	Number	NA	Specifies the number of floors in the building.
Total Units	Number	NA	Indicates the total number of units in the building.

Building  
Al- Ajmal Tower 1

Related
Details

Buildings Name  
Al- Ajmal Tower 1

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Project  
[Al-Ajmal](#)

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Total Floors  
5

---

Total Units  
30

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Created By  
 [Sana Chaudhary](#), 24/06/2024, 1:45 pm

Owner  
 [Sana Chaudhary](#)

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Last Modified By  
 [Sana Chaudhary](#), 05/07/2024, 12:32 pm

- **Floor (Custom):** The object helps in organizing and keeping track of different floors within a building, making it easier to manage and retrieve information about each floor.

Field Label	Field Type	Pick list Value	Description
Floor Name	Text	NA	Contains the name of the floor.
Project	Lookup (Project)	NA	Links to the related project this floor is part of.
Building	Lookup (Building)	NA	Links to the related building that contains this floor.
Floors Number	Number	NA	Defines the floor number within the related building.
Units	Number	NA	Indicates the total number of units in the floor.

**Floor**  
**1st Floor**

**Related**   **Details**

Floor Name  
1st Floor

Project  
[Al-Ajmal](#)

Building Name  
[Al- Ajmal Tower 1](#)

Floor Number  
1

Units  
6

Created By  
[Sana Chaudhary](#), 26/06/2024, 12:03 pm

Owner  
[Sana Chaudhary](#)

Last Modified By  
[Sana Chaudhary](#), 17/07/2024, 1:19 pm

Floors  
**Leasing Floors**

24 Items • Sorted by Floor Name • Filtered by All floors - Project • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Floor Name ↑	Project	Building Name	Floor Number	Units	
<input type="checkbox"/>	1st Floor	Al-Ajmal	Al- Ajmal Tower 1	1	6	
<input type="checkbox"/>	1st Floor	Avenue Realty	Avenue Daffodil	1	2	
<input type="checkbox"/>	1st Floor	Avenue Realty	Avenue Imperia	1	2	
<input type="checkbox"/>	1st Floor	Al-Ajmal	Al- Ajmal Tower 1	1	3	
<input type="checkbox"/>	1st Floor	Al-Ajmal	Al-Fateh Tower 2	1	3	
<input type="checkbox"/>	1st Floor	Al-Ajmal	Al- Ajmal Tower 1	1	3	
<input type="checkbox"/>	2nd Floor	Al-Ajmal	Al- Ajmal Tower 1	2	6	
<input type="checkbox"/>	2nd Floor	Avenue Realty	Avenue Daffodil	2	2	
<input type="checkbox"/>	2nd Floor	Avenue Realty	Avenue Imperia	2	2	
<input type="checkbox"/>	2nd Floor	Al-Ajmal	Al-Fateh Tower 2	2	3	
<input type="checkbox"/>	2nd Floor	Al-Ajmal	Al- Ajmal Tower 1	2	3	
<input type="checkbox"/>	2nd Floor	Al-Ajmal	Al- Ajmal Tower 1	2	3	
<input type="checkbox"/>	3rd Floor	Al-Ajmal	Al- Ajmal Tower 1	3	6	
<input type="checkbox"/>	3rd Floor	Avenue Realty	Avenue Daffodil	3	2	

➤ **Unit (Custom):** This object represents individual flats or apartments within a building. It acts as the actual product offered by the company, storing all the necessary details about each unit.

Field Label	Field Type	Pick List Value	Description
<b>Unit No.</b>	Auto Number	NA	Automatically generated unique number for the unit.
<b>Project</b>	Lookup (Project)	NA	Links to the related project this unit belongs to.
<b>Building</b>	Lookup (Building)	NA	Links to the related building where this unit is located.
<b>Floor</b>	Lookup (Floor)	NA	Links to the specific floor where the unit is situated.
<b>Status</b>	Picklist	Available Blocked Sold	Indicates the current status of the unit (whether it's available, blocked, or sold).
<b>Sell Price</b>	Currency	NA	The price at which the unit is being sold.
<b>Area (sqft)</b>	Number	NA	The area of the unit in square feet.

<b>Unit Type</b>	Picklist	Shop 1BHK 2BHK 3BHK	Specifies the type of unit (e.g., Shop, 1-bedroom, 2-bedroom, 3-bedroom).
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Unit  
**101**

Related
**Details**

Unit No.  
101

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Project Name  
[Al-Ajmal](#)

---

Building  
[Al- Ajmal Tower 1](#)

---

Floor  
[1st Floor](#)

---

Created By  
 [Sana Chaudhary](#), 27/06/2024, 12:04 pm

Status  
Sold

---

Vacant Date

---

Rent Price  
\$20,000

---

Area (sqft)  
1,800

---

Unit Type  
2BHK

---

Last Modified By  
 [Sana Chaudhary](#), 15/03/2025, 4:14 pm

## Opportunity Overview

- **Opportunity (Standard):** This object is used to manage deals and track their current status, ensuring that sales processes are effectively monitored and managed.

We have customized the opportunity as below to better manage and track deals.

Field Label	Field Type	Pick List Value	Description
<b>Close Date</b>	Date	NA	The expected date when the opportunity will be closed.
<b>Stage</b>	Picklist	Prospecting Negotiation/Review Approval Lease Signing Closed Won Closed Lost	Tracks the process of the opportunity.
<b>Deal Lost Reason</b>	Picklist	<ul style="list-style-type: none"> <li>Tenent Changed Mind</li> <li>Location not preferred</li> <li>Security concerns</li> <li>Loan application denied</li> <li>Higher offer accepted</li> </ul>	Reasons why a deal might be lost.

		<ul style="list-style-type: none"> <li>• Terms not agreed</li> </ul>	
<b>Project</b>	Lookup (Project)	NA	Stores the related project name.
<b>Building</b>	Lookup (Building)	NA	Stores the related building name.
<b>Unit Type</b>	Picklist	Shop 1 BHK 2 BHK 3 BHK	Stores the type of unit the customer is interested in.
<b>Payment Plan</b>	Lookup (Payment Plan)	NA	Links to the payment plan related to the opportunity.
<b>Real Estate Agent</b>	Lookup (Real Estate Agent)	NA	Links to the real estate agent involved with the opportunity.
<b>Sales Person</b>	Lookup (User)	NA	Stores the name of the sales person handling the opportunity.
<b>Lead Source</b>	Text	NA	Comes from the lead source.
<b>To Date</b>	Date	NA	The ending date when the rental period expires.
<b>From Date</b>	Date	NA	The starting date when the unit is rented out.
<b>Opportunity Payment Plan Type</b>	text	NA	Shows the name of payment plan.

**Opportunity**  
**Abhi Pawar**

Opportunity Owner <a href="#">Sana Chaudhary</a>	Lease Amount <b>\$10,000</b>
Opportunity Name <b>Abhi Pawar</b>	Stage <b>Closed Won</b>
Account Name <a href="#">Abhi Pawar</a>	From Date <b>01/07/2024</b>
Phone <b>8855025874</b>	To Date <b>30/06/2025</b>
Probability (%) <b>100%</b>	Close Date <b>12/07/2024</b>
Project <a href="#">Al-Ajmal</a>	Deal Lost Reason
Building <a href="#">Al- Ajmal Tower 1</a>	Sales Person <b>Shaif Shaikh</b>
Unit Type <b>Shop</b>	
Payment Plan <a href="#">Quarterly Payment</a>	
Lead Source <b>Phone Inquiry</b>	
Opportunity Payment plan Type	

**Opportunities**  
**Leasing Opportunities**

31 items • Sorted by Opportunity Name • Filtered by My opportunities - Opportunity Record Type • Updated a few seconds ago

	Opportunity Na...	Stage	Close Date	Lease...	From Date	To Date	Project	Building	Uni...	Opportunity Rec...	Payment Plan
1	<input type="checkbox"/> ABC Test oppornthly	Closed Won	16/03/2025...	\$10,000	16/03/2025	15/03/20...	Avenue Realty	Avenue Daffodil	1 BHK	Leasing Opportunity	Yearly Payment
2	<input type="checkbox"/> Abhi manu	Closed Won	10/08/2024...	\$10,000	07/08/2024	06/07/20...	Al-Ajmal	Al- Ajmal Tower 1	Shop	Leasing Opportunity	Quarterly Payment
3	<input type="checkbox"/> Abhi Pawar	Closed Won	12/07/2024...	\$10,000	01/07/2024	30/06/20...	Al-Ajmal	Al- Ajmal Tower 1	Shop	Leasing Opportunity	Quarterly Payment
4	<input type="checkbox"/> Ady christan	Closed Won	15/03/2025...	\$20,000	16/03/2025	15/03/20...	Avenue Realty	Avenue Imperia	1 BHK	Leasing Opportunity	Monthly Payment
5	<input type="checkbox"/> Aina Dsouza	Closed Won	10/07/2024...	\$15,000	01/07/2023	01/07/20...	Al-Ajmal	Al- Ajmal Tower 1	Shop	Leasing Opportunity	Yearly Payment
6	<input type="checkbox"/> Al Mumtaz Jabi	Closed Won	29/06/2024...	\$20,000	20/06/2024	20/06/20...	Al-Ajmal	Al- Ajmal Tower 1	2 BHK	Leasing Opportunity	Half yearly payment
7	<input type="checkbox"/> Alfaiz al matin	Closed Lost	05/07/2024...	\$20,000	01/05/2023	30/04/20...	Al-Ajmal	Al- Ajmal Tower 1	2 BHK	Leasing Opportunity	Bi-Monthly Payment
8	<input type="checkbox"/> Anthony Edwards	Closed Won	10/07/2024...	\$20,000	01/07/2024	30/06/20...	Al-Ajmal	Al- Ajmal Tower 1	2 BHK	Leasing Opportunity	Half yearly payment
9	<input type="checkbox"/> Charles Roven	Closed Won	05/06/2024...	\$15,000	01/06/2024	31/05/20...	Al-Ajmal	Al- Ajmal Tower 1	1 BHK	Leasing Opportunity	Half yearly payment
10	<input type="checkbox"/> Christopher Nolan	Closed Won	10/01/2024...	\$20,000	01/01/2024	31/12/20...	Al-Ajmal	Al- Ajmal Tower 1	2 BHK	Leasing Opportunity	Quarterly Payment
11	<input type="checkbox"/> David Beckham	Closed Lost	05/07/2024...	\$10,000	01/06/2025	01/07/20...	Al-Ajmal	Al- Ajmal Tower 1	1 BHK	Leasing Opportunity	Bi-Monthly Payment
12	<input type="checkbox"/> Jack Jones	Prospecting	05/07/2024...	\$15,000	10/07/2024	09/07/20...	Al-Ajmal	Al- Ajmal Tower 1	1 BHK	Leasing Opportunity	Monthly Payment
13	<input type="checkbox"/> Jaiswal Shinde	Closed Lost	04/07/2024...	\$20,000	01/07/2025	01/07/20...	Al-Ajmal	Al- Ajmal Tower 1	2 BHK	Leasing Opportunity	Quarterly Payment

Created a Real Estate Agents Object in salesforce and customized as follows:



Real Estate Agent  
**Paradise Agency**

Related
Details

Real Estate Agency Name Paradise Agency <span style="float: right;">✎</span>	Real Estate Agent Name Kamal Bhatiya <span style="float: right;">✎</span>
Mobile Number 919843906754 <span style="float: right;">✎</span>	Agent Mobile Number 919846545790 <span style="float: right;">✎</span>
Email <a href="mailto:paradice.support@gmail.com">paradice.support@gmail.com</a> <span style="float: right;">✎</span>	Agent Email <a href="mailto:kamal@gmail.com">kamal@gmail.com</a> <span style="float: right;">✎</span>
Region Dubai <span style="float: right;">✎</span>	
Website <a href="http://paradiseagency.com">paradiseagency.com</a> <span style="float: right;">✎</span>	
Created By <a href="#">Sana Chaudhary</a> , 15/07/2024, 4:57 pm	Last Modified By <a href="#">Sana Chaudhary</a> , 15/07/2024, 5:01 pm

After that Sales user will identify all the units that meet the customer's criteria and budget. After finding suitable options, the sales user presents these units to the customer, helping them find the best match for their needs.

After the customer confirms their interest in a unit, the sales person adds the selected unit to the **Opportunity's related tab "Opportunity units"**.

To connect the opportunity and units created a custom object called opportunity units.

- **Opportunity unit:** This is a junction object that connects the Opportunity with the Unit and stores all crucial details about the unit sale.

The Opportunity Units object includes several key fields:

Field Label	Field Type	Pick List Value	Description
<b>Opportunity Unit Number</b>	Auto Number	NA	An auto-generated number for identifying the unit sale record.
<b>Opportunity</b>	Lookup (Opportunity)	NA	Links to the related opportunity.
<b>Project</b>	Lookup (Project)	NA	Links to the related project.
<b>Building</b>	Lookup (Building)	NA	Links to the related building.
<b>Floor</b>	Lookup (Floor)	NA	Links to the related floor.
<b>Unit</b>	Lookup (Unit)	NA	Links to the specific unit number.
<b>Area</b>	Number	NA	The area of the unit, taken from the added unit.

Selling Price	Currency	NA	The selling price of the unit.
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**Opportunity: Amaira Avery**

Account Name: Amaira Avery | Close Date: 25/07/2024 | Amount: \$2,000,000.00 | Opportunity Owner: Sana Chaudhary

Process Flow: Site Visit → Bank Finance approval In Pro... → Bank Finance Approved → Negotiation → Closed

**Details**

Opportunity Name	Amaira Avery	Total Amount	\$2,000,000
Account Name	Amaira Avery	Close Date	25/07/2024
Probability (%)	20%	Stage	Site Visit
Payment Plan	Buruj Al-Maktoom B3 - Plan A	Deal Lost Reason	
Project	Buruj Al-Maktoom	Bank Finance	Wealth Managements
Building	Buruj Al-Maktoom Building 3	Bank Finance Status	<input checked="" type="checkbox"/>
Unit Type		Bank Finance Percentage	

**Related**

**Opportunity Units (1)**

OU-0044

Unit: UN-0007

Area: 1,400

Project: Buruj Al-Maktoom

[View All](#)

**Opportunity Unit: OU-0044**

**Details**

Fields

Information

Opportunity Unit Number	OU-0044	Unit	UN-0007
Opportunity	Amaira Avery	Area	1,400
Project	Buruj Al-Maktoom		
Building	Buruj Al-Maktoom Building 3		
Floor	2nd floor		

After adding the units to the opportunity, the sales user will reach out to the customer and provide them with the details for a site visit.

Once the customer has completed the site visit and is ready to lease the unit, the sales user will present the available payment plans along with their details.

## II. Payment Plan Overview and Automation

- **Payment Plan:** A Payment Plan is a detailed chart outlining the instalment schedule, including the percentages for each payment. This helps the customer understand their financial commitments for the renting.

Field Label	Field Type	Pick List Value	Description
Payment Plan Name	Text	NA	The name or title of the payment plan.
Project	Lookup (Project)	NA	Links to the related project name.
Building	Lookup (Building)	NA	Links to the related building name.
1st Installment Percentage	Percentage	NA	The percentage for the first instalment..
2nd Installment Percentage	Percentage	NA	NA
3rd Installment Percentage	Percentage	NA	NA
4th Installment Percentage	Percentage	NA	NA
5th Installment Percentage	Percentage	NA	NA
6th Installment Percentage	Percentage	NA	NA
7th Installment Percentage	Percentage	NA	NA
8th Installment Percentage	Percentage	NA	NA
9th Installment Percentage	Percentage	NA	NA
10th Installment Percentage	Percentage	NA	NA
11th Installment Percentage	Percentage	NA	NA
12th Installment Percentage	Percentage	NA	NA




## Payment Plans for Leasing

To provide flexibility to customers, the leasing project offers five different payment plans based on their financial preferences. These payment plans define how the rental payments are scheduled over the lease duration.

### 1. Monthly Payment Plan

- The customer will make payments every month.
- The rental amount is divided into equal monthly installments.
- Payment is due on a specific date each month as agreed in the lease agreement.

- Suitable for customers who prefer regular, smaller payments.

Payment Plan	
Monthly Payment	
Related	Details
Payment Plan Name	Monthly Payment
Project	Building
<a href="#">Al-Ajmal</a>	<a href="#">Al- Ajmal Tower 1</a>
1st Inst. Percentage	Owner
8.33%	 <a href="#">Sana Chaudhary</a>
2nd Inst. Percentage	
8.33%	
3rd Inst. Percentage	
8.33%	
4th Inst. Percentage	
8.33%	
5th Inst. Percentage	
8.33%	
6th Inst. Percentage	
8.33%	
7th Inst. Percentage	
8.33%	
8th Inst. Percentage	
8.33%	
9th Inst. Percentage	
8.33%	
10th Inst. Percentage	
8.33%	
11th Inst. Percentage	
8.33%	
12th Inst. Percentage	
8.33%	
Created By	Last Modified By
 <a href="#">Sana Chaudhary</a> , 27/06/2024, 11:44 am	 <a href="#">Sana Chaudhary</a> , 05/07/2024, 11:33 am

## 2. Bi-Monthly Payment Plan

- Payments are made every two months.
- The rental amount is divided into equal payments for every alternate month.
- Reduces the number of transactions while maintaining a structured schedule.
- Ideal for customers who want a moderate payment frequency.

Payment Plan	
Bi-Monthly Payment	
Related	Details
Payment Plan Name	Bi-Monthly Payment
Project	Building: <a href="#">Al- Ajmal Tower 1</a> Owner: <a href="#">Sana Chaudhary</a>
1st Inst. Percentage	16.67%
2nd Inst. Percentage	16.67%
3rd Inst. Percentage	16.67%
4th Inst. Percentage	16.67%
5th Inst. Percentage	16.67%
6th Inst. Percentage	16.65%
Created By	Last Modified By
<a href="#">Sana Chaudhary</a> , 27/06/2024, 11:47 am	<a href="#">Sana Chaudhary</a> , 15/07/2024, 5:49 pm


### 3. Quarterly Payment Plan

- Payments are made every three months.
- The total rental amount is split into four equal payments per year.
- Commonly chosen by businesses and individuals who prefer less frequent transactions.
- Helps in better cash flow management for customers.

Payment Plan	
Quarterly Payment	
Related	Details
Payment Plan Name	Quarterly Payment
Project	Building: <a href="#">Al- Ajmal Tower 1</a> Owner: <a href="#">Sana Chaudhary</a>
1st Inst. Percentage	25.00%
2nd Inst. Percentage	25.00%
3rd Inst. Percentage	25.00%
4th Inst. Percentage	25.00%
Created By	Last Modified By
<a href="#">Sana Chaudhary</a> , 27/06/2024, 11:49 am	<a href="#">Sana Chaudhary</a> , 10/07/2024, 12:36 pm

#### 4. Half-Yearly Payment Plan








- Payments are made every six months.
- The rental amount is divided into two equal payments per year.
- Offers more flexibility for customers who prefer larger but fewer payments.
- Often chosen by corporate clients or long-term tenants.

 Payment Plan  
**Half yearly payment**

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Related **Details**

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Payment Plan Name	Half yearly payment		
Project	<a href="#">Al-Ajmal</a>		Building
1st Inst. Percentage	50.00%		<a href="#">Al- Ajmal Tower 1</a>
2nd Inst. Percentage	50.00%		Owner
Created By	 <a href="#">Sana Chaudhary</a> , 27/06/2024, 11:48 am		
			Last Modified By
			 <a href="#">Sana Chaudhary</a> , 27/06/2024, 11:48 am

#### 5. Yearly Payment Plan







- A single payment is made once per year.
- The total annual rental amount is paid upfront.
- Provides the highest level of convenience with minimal transactions.
- Often comes with potential discounts or benefits for advance payment.

 Payment Plan  
**Yearly Payment**

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Related **Details**

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Payment Plan Name	Yearly Payment		
Project	<a href="#">Al-Ajmal</a>		Building
1st Inst. Percentage	100.00%		<a href="#">Al- Ajmal Tower 1</a>
Created By	 <a href="#">Sana Chaudhary</a> , 27/06/2024, 11:50 am		Owner
			
			Last Modified By
			 <a href="#">Sana Chaudhary</a> , 27/06/2024, 11:50 am



**Details**

**Opportunity Payment Plan**

Invoices

Opportunity Owner	<a href="#">Sana Chaudhary</a>	Lease Amount	\$10,000
Opportunity Name	ABC Test opporntny	Stage	Closed Won
Account Name	<a href="#">Dickenson plc</a>	From Date	16/03/2025
Phone	98987942	To Date	15/03/2026
Probability (%)	100%	Close Date	16/03/2025
Project	<a href="#">Avenue Realty</a>	Deal Lost Reason	
Building	<a href="#">Avenue Daffodil</a>	Sales Person	
Unit Type	1 BHK		
Payment Plan	<a href="#">Yearly Payment</a>		
Lead Source	Web		
Opportunity Payment plan Type	Yearly Payment		

Invoice Details

Total invoice Amount	\$10,000	Total Paid invoice Amount	
Total Unpaid invoice Amount			

System Information

Opportunity Record Type	Leasing Opportunity	Amount	\$1,000.00
Created By	<a href="#">Sana Chaudhary</a> , 16/03/2025, 12:07 am	Last Modified By	<a href="#">Sana Chaudhary</a> , 16/03/2025, 3:03 pm

- **Opportunity Payment Plan:** This object stores information about the opportunity and the payment plan, including the amount and other relevant details.

Field Label	Field Type	Pick List Value	Description
<b>Payment Plan Number</b>	Auto Number	NA	An auto-generated number for identifying the opportunity payment record.
<b>Inst. Number</b>	Number	NA	A numerical value representing the instalment number in the payment plan.
<b>Inst. Name</b>	Picklist	1 <sup>st</sup> installment 2 <sup>nd</sup> Installment 3 <sup>rd</sup> Installment 4 <sup>th</sup> Installment 5 <sup>th</sup> Installment 6 <sup>th</sup> Installment 7 <sup>th</sup> Installment 8 <sup>th</sup> Installment 9 <sup>th</sup> Installment 10 <sup>th</sup> Installment 11 <sup>th</sup> Installment 12 <sup>th</sup> Installment	A picklist to select the instalment name.
<b>Inst. Percentage</b>	Number	NA	A numerical value representing the percentage of the total amount allocated to the specific instalment.
<b>Amount</b>	Currency	NA	The amount for each instalment, typically calculated based on the instalment percentage of the total opportunity amount.
<b>Opportunity</b>	Lookup(Opportunity)	NA	A lookup field that links the record to the related Opportunity.
<b>Payment Plan</b>	Lookup ( <b>Payment Plan</b> )	NA	A lookup field to link the record to the associated Payment Plan.





Related	Details
Payment Plan Number	Amount
OP-0390	\$10,000
Inst. Number	Inst. Percentage
1	100.00
Inst Name	Owner
1st Installment	Sana Chaudhary
Inst. Date	
16/03/2025	
Opportunity	
<a href="#">ABC Test opportunity</a>	
Payment Plan	
<a href="#">Yearly Payment</a>	

Once the Payment Plan is added and record is saved, An **Opportunity Payment Plan** will be created to capture and manage the payment details for the opportunity.

#### Automations / Flow :

When a payment plan is added to the Opportunity object, follow these steps to create Opportunity Payment Plans automatically:

- Create Opportunity Payment Plans: For each instalment defined in the payment plan, create a corresponding Opportunity Payment Plan record.
- Divide the Amount: Divide the total opportunity amount based on the percentage specified for each instalment.
- Add Details: Include the instalment name, date, and link each Opportunity Payment Plan to the related opportunity.


This process ensures that the payment plan is accurately reflected in the Opportunity Payment Plans, with the amount distributed according to the defined instalments.

### III. Invoice Overview














- **Invoice:** The **Invoice** object in Salesforce will store all details related to these invoices, ensuring accurate tracking of payments and financial records.

Field Label	Field Type	Pick List Value	Description
<b>Invoice Number</b>	Auto Number	NA	An auto-generated number for the invoice.
<b>Account</b>	Lookup (Account)	NA	Links to the related account.
<b>Opportunity</b>	Lookup (Opportunity)	NA	Links to the related opportunity.
<b>Unit</b>	Lookup (Unit)	NA	Links to the related unit name.

<b>Payment Plan</b>	Lookup (Payment Plan)	NA	Links to the related payment plan.
<b>instalment Amount</b>	Currency	NA	Amount for the instalment, from the payment plan.
<b>installment Date</b>	Date	NA	Date of the installment, from the payment plan.
<b>Payment Status</b>	Picklist	Paid, Unpaid, Not Applicable	Status of the payment.
<b>Due Date</b>	Date	NA	Due date for the payment.
<b>Due Days</b>	Formula (Number)	NA	Calculates the number of days overdue: <code>TODAY () - Due Date c</code>

 Invoice **IN-0004**

Related
Details

Invoice Number IN-0004	Inst. Amount \$833 
Inst. Name 1st Installment 	Inst. Date 04/07/2022 
Account <a href="#">James dean</a> 	Payment Status Paid 
Opportunity <a href="#">James dean</a> 	Due Date 
Unit 3 	Due Days
Payment Plan <a href="#">Monthly Payment</a> 	Due Period
Created By  <a href="#">Sana Chaudhary</a> , 03/07/2024, 12:16 pm	Owner  <a href="#">Sana Chaudhary</a> 
	Last Modified By  <a href="#">Sana Chaudhary</a> , 03/07/2024, 12:16 pm



Opportunities > James dean

## Invoices

12 items • Sorted by Invoice Number • Updated a few seconds ago

<input type="checkbox"/>	Invoice ... ↑ ↓	Inst. Name ↓	Inst. Amount ↓	Inst. Date ↓	Payment S... ↓	Payment Plan ↓	
1	<input type="checkbox"/> <a href="#">IN-0004</a>	1st Installment	\$833	4/7/2022	Paid	Monthly Payment	▼
2	<input type="checkbox"/> <a href="#">IN-0005</a>	2nd Installment	\$833	4/8/2022	Paid	Monthly Payment	▼
3	<input type="checkbox"/> <a href="#">IN-0006</a>	3rd Installment	\$833	4/9/2022	Paid	Monthly Payment	▼
4	<input type="checkbox"/> <a href="#">IN-0007</a>	4th Installment	\$833	4/10/2022	Paid	Monthly Payment	▼
5	<input type="checkbox"/> <a href="#">IN-0008</a>	5th Installment	\$833	4/11/2022	Paid	Monthly Payment	▼
6	<input type="checkbox"/> <a href="#">IN-0009</a>	6th Installment	\$833	4/12/2022	Paid	Monthly Payment	▼
7	<input type="checkbox"/> <a href="#">IN-0010</a>	7th Installment	\$833	4/1/2023	Paid	Monthly Payment	▼
8	<input type="checkbox"/> <a href="#">IN-0011</a>	8th Installment	\$833	4/2/2023	Paid	Monthly Payment	▼
9	<input type="checkbox"/> <a href="#">IN-0012</a>	9th Installment	\$833	4/3/2023	Paid	Monthly Payment	▼
10	<input type="checkbox"/> <a href="#">IN-0013</a>	10th Installment	\$837	4/4/2023	Paid	Monthly Payment	▼
11	<input type="checkbox"/> <a href="#">IN-0014</a>	11th Installment	\$833	4/5/2023	Paid	Monthly Payment	▼
12	<input type="checkbox"/> <a href="#">IN-0015</a>	12th Installment	\$833	4/6/2023	Paid	Monthly Payment	▼

## Automations / Flow :

When the opportunity stage is updated to "Sold," and if the date for the first installment in the Opportunity Payment Plan is today, perform the following actions:

- Create an Invoice: Generate an invoice for the opportunity based on the payment plan details.

## REPORTS and DASHBOARD:

1. Create a dashboard on lead which shows the below details:
  - Lead Created By Month
  - Leads By Interested In Project
  - Lead By Source (Real Estate)
  - Leads By Status
  - Leads By Rating

**Lead Created By Month**



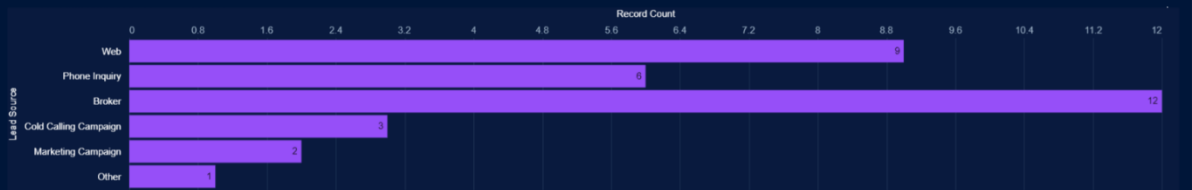
[View Report \(Lead Created By Month \(Real Estate\)\)](#)

**Leads By Interested In Project**



[View Report \(Leads By Interested In Project\)](#)

**Lead By Source (Real Estate)**



[View Report \(Lead By Source \(Real Estate\)\)](#)

**Leads By Status (Real Estate)**



[View Report \(Leads By Status \(Real Estate\)\)](#)

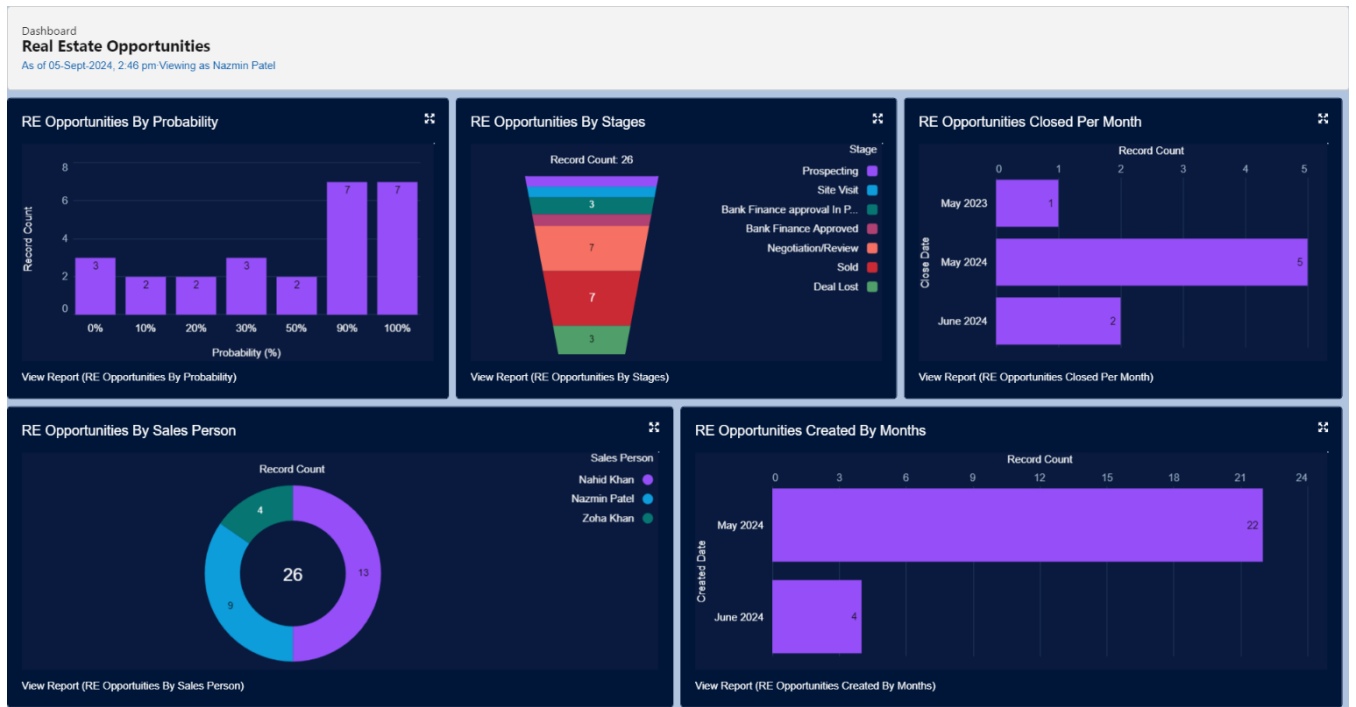
**Lead By Rating**



[View Report \(Lead By Rating \(Real Estate\)\)](#)

2. Create a dashboard on opportunity which shows the below details:

- Opportunities By Probability
- Opportunities By Stages
- Opportunities Closed Per Month
- Opportunities By Sales Person
- Opportunities Created By Months



3. Create a dashboard on invoice and titled it as "Invoice: Opportunity Outstanding Due" as below.

Following details will be defined on dashboard:

- Overdue Amount by Sales person (user)
- Invoice Due report by Account
- Sue Amount with Due Period
- Account with Due Amount (Table format)
- Invoice Count with Due Period.

