



CLIENT GUIDE

8020CRM documentation

End-to-end guidance for configuring 8020CRM, finding and working opportunities, managing investment and retail transactions, closing, reporting, and support.

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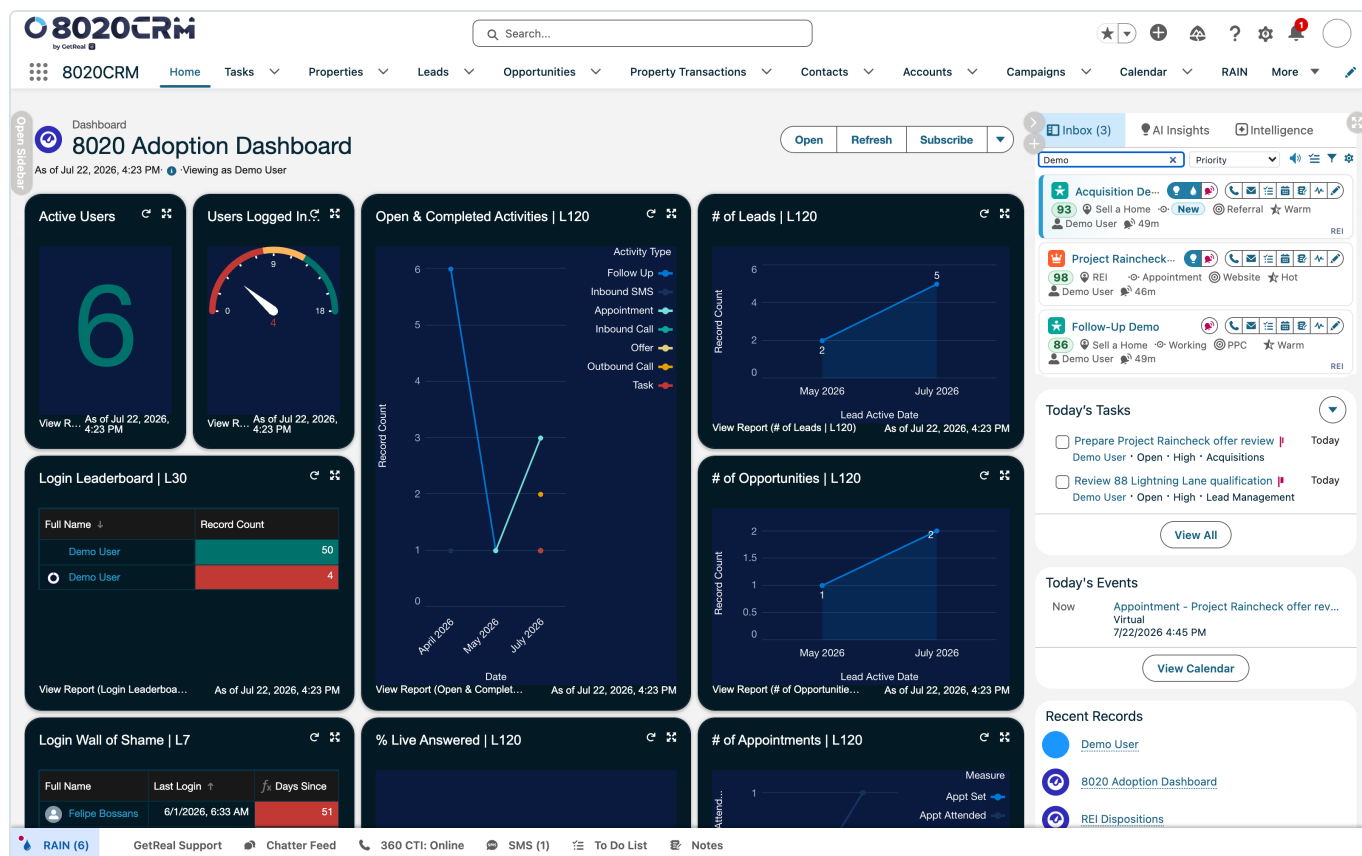
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Welcome to 8020CRM

Learn how 8020CRM connects customer relationships, property work, deals, activities, and operational reporting in one Salesforce experience.

8020CRM brings customer relationships, property work, deals, follow-up, and reporting into one connected Salesforce experience. The goal is simple: each person should be able to see what has happened, who is responsible now, and what should happen next.

RAIN OS provides the communications and AI foundation used by configured 8020CRM experiences. RAIN Intelligence is optional and may not be available in every organization.



The available navigation and dashboard content vary by role, access, and configuration.

What this helps you do

Use 8020CRM to:

- Capture and qualify new interest.
- Connect people with the correct property and deal.
- Preserve proposals, milestones, activities, notes, and files.
- Coordinate work across sales, transaction, marketing, and management teams.
- Close the journey with complete information for reporting and follow-up.

Choose a learning path

I need to...	Start here
Understand the screen I am looking at	Home, navigation, and the utility bar and Record pages, tabs, and guided workspaces
Plan today's follow-up	Tasks, events, and daily work and RAIN Hub, Inbox, and daily priorities
Capture and convert a new relationship	Lead intake, assignment, and nurture and Lead conversion and deal setup
Run an acquisition, disposition, retail, or closing workflow	Guided forms by lifecycle, then the applicable deal lifecycle
Work buyer criteria and matches	Buy Box, buyer matching, and prospecting
Operate marketing	Campaigns, marketing, and response follow-up and Expenses, Campaign Statistics, and marketing performance
Understand results	Report and dashboard catalog and Reports, dashboards, and operational health
Configure or troubleshoot the product	Setup, access, and launch readiness and Troubleshooting and safe recovery

Where to work

Most users begin from Home, a work list, a queue, or an assigned activity. Open the record that best represents the work before starting an action.

Record	Use it for
Lead	Unqualified interest, early contact, assignment, and nurture
Property	The durable identity and known details for a property
Opportunity	Pipeline, customer relationship, and commercial progress
Property Transaction	Property-specific operations, parties, dates, offers, and closing
Offer	A distinct proposal and its terms or outcome
Task, Event, or Communication	The next commitment or completed interaction

Work through it

1. Start from the assigned work item or the intended customer, property, or deal record.
2. Review the owner, lifecycle status, recent activity, related records, and next action before editing.
3. Update the record that owns the business fact. For example, keep proposal terms on the Offer and operational milestones on the Property Transaction.
4. Save the change once, then confirm that the initiating record reflects it.
5. Check the related records that should receive or summarize the result.
6. Record the next Task, Event, or communication so responsibility remains clear.

Some results are immediate, such as a saved value or newly visible record. Assignment, property updates, relationship reconciliation, activity measures, campaign calculations, and connected-service work may complete later.

Confirm the result

Work is ready to hand off when the intended records are connected, the current owner and lifecycle state are accurate, recent activity is visible, and the next responsible user can continue without reconstructing the history elsewhere.

For a delayed result, refresh the relevant records after a reasonable processing interval. A successful save confirms the first step completed; it does not always confirm that every related update is finished.

If it does not look right

Before retrying, check whether the first attempt created a complete or partial result. Repeating conversion, enrichment, stage changes, outreach, or offer actions can create duplicate work or conflicting records. If part of the workflow succeeded, repair only the missing relationship, value, or follow-up step.

Related guidance

- From first contact to close
- Roles, workspaces, and key records
- Setup, access, and launch readiness

Home, navigation, and the utility bar

Start the day from the default 8020CRM interface, understand what Home shows by role, and use the navigation and utility bar without losing record context.

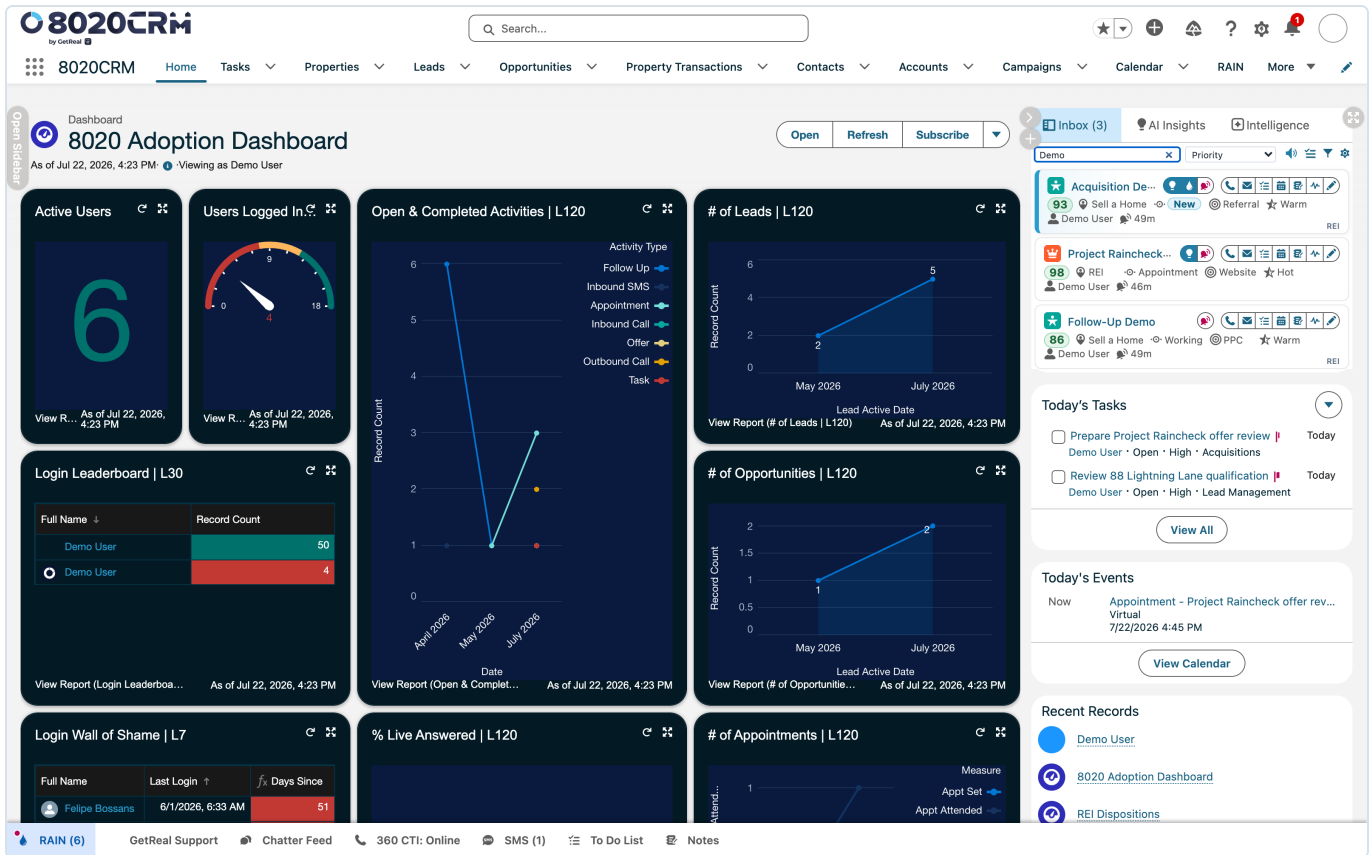
Start from the 8020CRM app

From Salesforce, open the App Launcher, select **View All**, and open **8020CRM**. The packaged desktop navigation begins with Home and then provides Tasks, Properties, Leads, Opportunities, Property Transactions, Contacts, Accounts, Campaigns, and Events. Analytics, Files, Maps, **GetReal Account**, **Appointment Dispositions**, and **GetReal Support** follow when the user has the corresponding access.

The navigation is a starting map, not a promise that every user sees every item. Licenses, permission sets, profiles, tab visibility, page activation, form factor, and local configuration can change the visible set.

Salesforce owns the App Launcher and standard Lightning navigation behavior; use Find and Select Salesforce Apps in Lightning Experience  and Navigate Around  for those platform controls. This guide identifies the configured application, tabs, and utilities that provide the business-workflow starting points.

Read Home as a daily briefing



Notice how navigation establishes the workspace while dashboard panels and the utility bar keep daily work in view.

The default Home page combines several kinds of information:

Home area	How to use it
Launch tiles	Open Properties, Leads, Opportunities, Property Transactions, Accounts, or Contacts quickly
Role dashboard	Review the measures selected for administration, leadership, lead work, acquisitions, dispositions, or marketing
RAIN	Review configured AI-assisted work and notifications
Today's Tasks	Identify work due today without opening the full Tasks tab
Events	Review appointments and scheduled commitments
Recent Records	Return to records opened recently; do not treat this as a complete work queue

Home area	How to use it
Chatter	Publish or review collaborative updates according to record-sharing and notification rules

Dashboard content is role-aware. Administrators and leadership can see different dashboards from users assigned to lead, acquisition, disposition, or marketing responsibilities. A blank space can mean that the dashboard is hidden on error or that its permission condition is not met.

Choose the right route

1. Use **Home** for orientation and exceptions.
2. Use **Tasks** for an owned work list across records.
3. Use an object tab such as **Leads** or **Opportunities** to work a list view and open the authoritative record.
4. Use the record's guided tabs and actions to perform the job with the correct context.
5. Return to Home or the work list after confirming the saved result and next responsibility.

Salesforce owns standard list-view behavior. Use [Understanding List Views](#)  to choose and work a view, [Edit List View Filters](#)  to refine its population, and [Kanban View](#)  for the platform's visual record grouping. The object routes and lifecycle checks in this guide determine which records and business facts to act on after the view is selected.

IMPORTANT

Recent Records, dashboard rows, RAIN items, and search results are pointers. Open the underlying record before changing status, ownership, financial terms, or lifecycle milestones.

Use the utility bar

The utility bar stays available while users move between records. The packaged 8020CRM bar can include:

Utility	Intended use
RAIN	Open the RAIN workspace without leaving the current Salesforce page
GetReal Support	Review or submit product support information

Utility	Intended use
Chatter Feed	Monitor collaborative posts and updates
Phone	Place and receive calls when the user and call center are configured
To Do List	Work Salesforce's unified task list
Notes	Create and review Salesforce Notes

Opening a utility does not change which CRM record owns the business fact. Confirm the active record before calling, writing a note, accepting a suggestion, or launching an action.

When something is missing

For a missing tab, check app assignment and tab visibility. For a missing page section, check the active Lightning page, application, record type, profile or permission, and device. For a blank dashboard, check folder sharing, source-record access, the dashboard running context, and the role condition. For Phone or RAIN, also check the dependency permission, service setup, and user assignment.

Navigation is working when the user can open the assigned app, reach the authoritative object record, and return to Home or the work list without losing record context. Continue with RAIN Hub and Inbox for the RAIN entry points and List views, filters, and display for object work lists.

RAIN Hub, Inbox, and daily priorities

Use Inbox in RAIN Hub to review attention items, suggestions, and Intelligence without confusing a notification with the authoritative CRM record.

Before you begin

You need the assigned 8020CRM or RAIN OS app, RAIN product access, and access to the CRM records behind the work. Phone, email, messaging, Intelligence, and assisted actions can require separate service setup and permissions. A visible RAIN item does not override Salesforce record sharing.

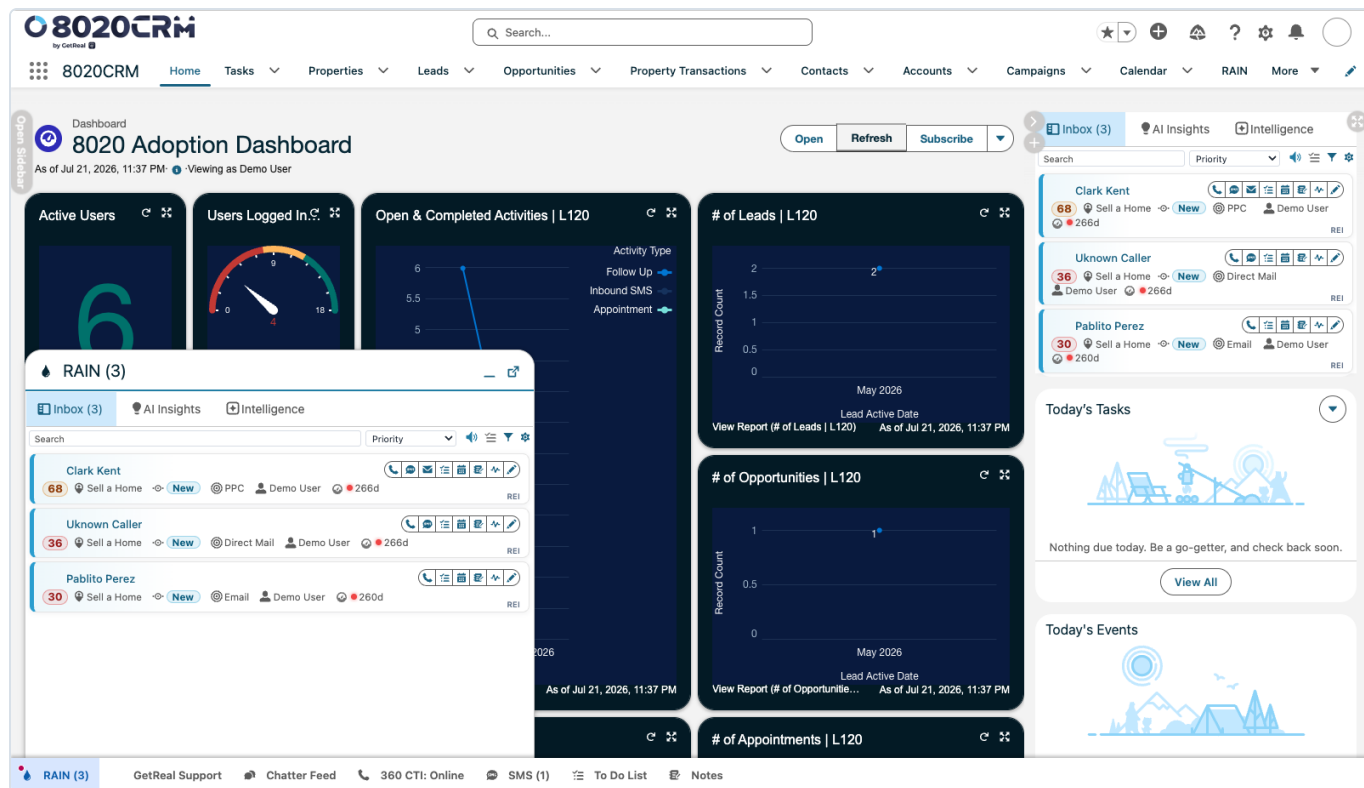
Open RAIN in the right context

Use the entry point that matches the work:

Starting point	Entry path	Context
8020CRM navigation	App Launcher > View All > 8020CRM > Home > RAIN	Embedded Home workspace and daily briefing
8020CRM utility bar	Open RAIN at the bottom of the current page	Keeps the current Salesforce page available behind the utility
RAIN OS app	App Launcher > View All > RAIN OS > RAIN Hub	Full RAIN Hub app page
RAIN OS utility bar	Open RAIN Hub from the utility bar when assigned	Persistent RAIN access while using the RAIN OS app
Supported CRM record	Open Activity Composer > RAIN	Record-aware assistance for the open record
8020CRM Mobile	Open the assigned RAIN navigation item	Mobile experience when the app and item are assigned

The routes can expose different record context and available tools. If one is missing, verify that specific app, tab, utility item, Lightning page, entitlement, and form factor before treating it as an Inbox data problem.

RAIN Hub presents three operational areas when enabled:



The expanded utility shows how RAIN stays available while a user works elsewhere in 8020CRM. Inbox, AI Insights, and Intelligence are separate tabs; the Home sidebar and utility items remain visible behind the panel.

- **Inbox** for records and events that need attention.
- **AI Insights** for generated observations and suggestions.
- **Intelligence** for the optional RAIN Intelligence experience.

Inbox is the default operational view. Its label can include an unread or attention count, and the utility item can highlight when new work arrives.

Triage the Inbox

1. Search when you know a person, record, need, status, or other visible term.
2. Sort and filter to isolate the most important or oldest work.

3. Review priority, score, category, ownership, record type, timing, and configured display chips.
4. Open the related CRM record and verify its current status, recent activity, owner, and sharing before acting.
5. Claim an eligible item when responsibility must move to you.
6. Complete, approve, reject, clear, or mark the item read only after understanding what that action changes.
7. Confirm the resulting Task, Event, Communication, field update, or other durable record.

Inbox controls can include search, sorting, filters, sound, **Mark All Read**, pagination, and **Inbox Display Chips**. Display chips change the context shown on an item; they do not alter the underlying business record.

IMPORTANT

Marking an Inbox item read acknowledges the notification. It does not complete the related CRM work unless the selected item action explicitly performs that work.

Use suggestions safely

A next-best-action or field suggestion is decision support. Review the target record, suggested value or action, reason, confidence, owner, and any related communication before approval. After approval, reopen the record and confirm the actual change. Reject a suggestion when it is inappropriate, stale, unsafe, or based on incomplete context; record a reason when the interface requests one.

Automatic approval can be configured for eligible cases. Administrators should use it only where the action, field, confidence rule, permission boundary, and rollback path are understood.

Understand counts and timing

RAIN Hub listens for new notification and insight events. Counts can update while the panel is open, but the related CRM transaction, provider callback, or background calculation may finish later. A count can also remain visible when the user can see the RAIN item but cannot open its related record because sharing is more restrictive.

Inbox is clear when no qualifying items remain. The empty state indicates that RAIN will notify the user when new work appears; it does not prove that every Salesforce Task, Event, queue item, or

overdue record is complete.

Confirm the result

After acting, reopen the related CRM record and confirm the durable Task, Event, Communication, field value, approval result, or other record that should have changed. Then refresh RAIN Hub and confirm the item state and count agree. A read state, accepted suggestion, or disappearing Inbox card is not sufficient when no expected business record changed.

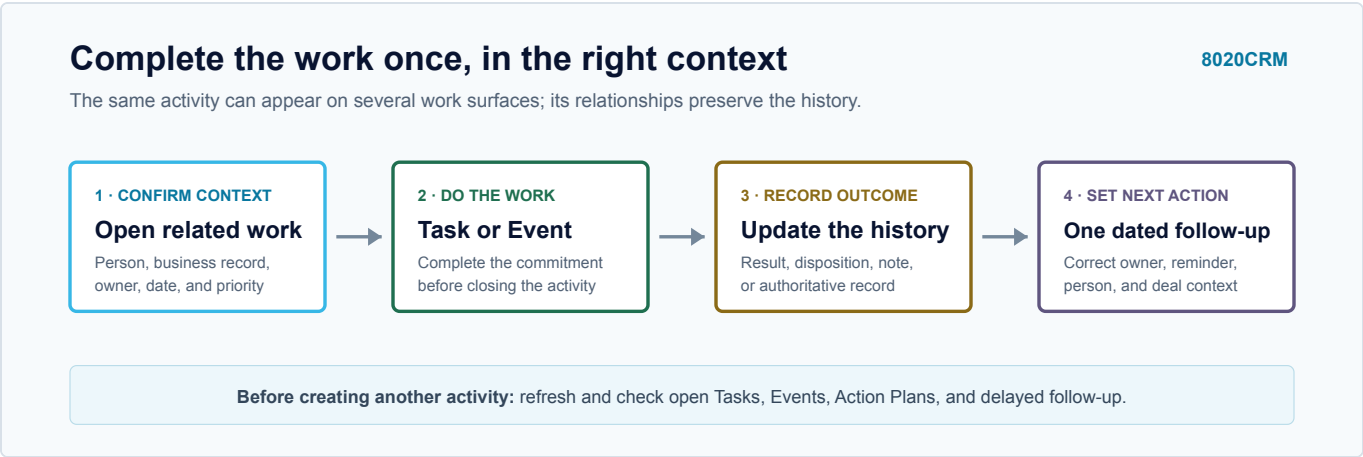
If the Inbox looks wrong

Symptom	Check
RAIN Hub is missing	App or utility assignment, RAIN OS permission, Lightning page, and setup completion
Count does not match the visible list	Active filters, search, pagination, read state, ownership, and event timing
Related record will not open	Record sharing, object permission, record deletion, and stale relationship
Suggestion cannot be approved	Status, target access, field access, policy, confidence gate, and prior action
Sound does not play	Inbox sound preference, browser media policy, system volume, and notification relevance

Continue with Activity Composer for record-aware RAIN actions and AI assistance, suggestions, and automation for approval and automation boundaries.

Tasks, events, and daily work

Distinguish the Tasks tab, Today's Tasks, To Do List, and record Activity tabs, then complete follow-up against the correct customer or deal.



Interpret the loop as a daily discipline: review context, record the interaction, and leave one owned, dated next action.

Before you begin

You need access to the Task or Event, its person and business record, and any activity or outcome fields your process requires. Confirm the owner, time zone, working calendar, reminder policy, and where the final customer or deal result belongs.

From the App Launcher, open **8020CRM**. Use **Tasks** for the full work list, **Home > Today's Tasks** for a daily summary, the **To Do List** utility for a persistent compact list, **Events** for scheduled commitments, or an open record's **Activity** area for record-specific history. These surfaces can contain the same Task or Event.

Know which task surface you are using

Surface	Best use
Tasks tab	Work list views across records, owners, dates, statuses, and priorities

Surface	Best use
Today's Tasks on Home	Quick review of work due today
To Do List in the utility bar	Keep a compact Salesforce task list open while navigating
Activity tab on a record	Review Tasks, Events, calls, and email in that record's context
Task record page	Complete one Task, review details and related records, use checklist or follow-up actions

These surfaces can show overlapping records. Completing the same Task from one surface should update the others; creating a second Task creates separate work.

Salesforce owns the Task, Event, and activity relationship model described in [Activities: Tasks and Events](#) 🌩. Salesforce also controls the standard record activity presentation through [Configure the Record Activity View](#) 🌩 and the documented [Activity Timeline Customization Considerations](#) 🌩. This guide explains how to apply those platform records to the configured customer and deal workflow.

Work a Task correctly

1. Open the Task and confirm its owner, due date, status, priority, subject, person relationship, and business-record relationship.
2. Open the related Lead, Opportunity, Property Transaction, or other business record when context is not clear.
3. Complete any checklist items and the actual customer or operational work.
4. Record the outcome in the appropriate activity, communication, appointment disposition, note, or business record.
5. Close the Task only when the work and outcome are complete.
6. Use the follow-up Task or Event action when another commitment is required.
7. Confirm the next item has the correct owner, date, reminder, and relationships.

Task records can provide edit, delete, follow-up Task, follow-up Event, note, series, and Chatter-related actions depending on access and configuration.

Work Events and appointments

Use an Event for scheduled time, meetings, and appointments. Relate it to the correct person and business record, then record the disposition or outcome after it occurs. Appointment outcomes can drive follow-up or lifecycle updates, some of which may complete asynchronously.

Use Salesforce's View Events in Salesforce Calendar 🗓 for the standard calendar display and navigation. The workflow boundary remains the related customer or deal record, where the appointment outcome and next responsibility must be confirmed.

An Event marked complete without a meaningful outcome can leave the deal, report, or next action ambiguous. Conversely, changing the deal stage does not replace recording the appointment result.

Confirm the result

Reopen the source Task or Event and confirm its status, owner, date or time, person, business record, and outcome. Then refresh the related Lead, Opportunity, Property Transaction, or other authoritative record and verify any expected follow-up Task, Event, appointment disposition, or lifecycle change. A toast or a disappeared Home card proves only that the surface refreshed.

Avoid duplicate follow-up

Before creating another Task, check open Tasks on the related record, the current Action Plan, automated follow-up settings, and any delayed processing. If the first save was slow, refresh rather than resubmitting immediately.

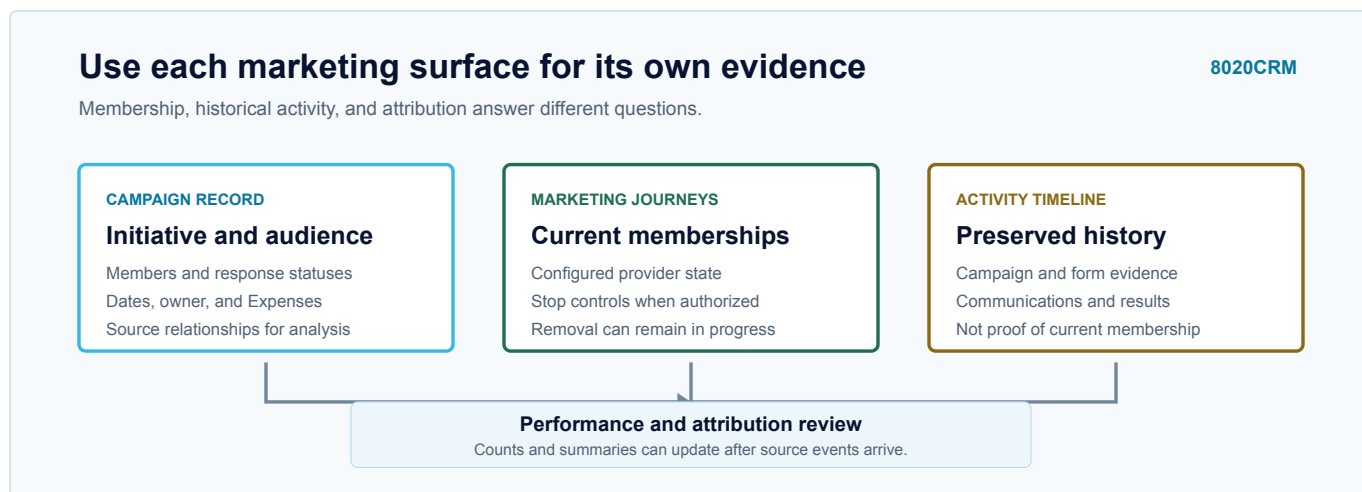
Managers should review overdue work by owner and lifecycle context, not only total Task count. Reassigning a Task does not necessarily reassign the customer or deal.

If a completed item remains visible, refresh and inspect the list filters and source record before creating another. If an activity is missing, check the person and business-record relationships, owner, access, save result, and any pending summary refresh. Preserve a valid historical activity and add a corrective follow-up when the original record should not be rewritten.

Use Appointment dispositions and Event Viewer for appointment outcomes and Action Plans for repeatable Task sequences.

Campaigns, marketing, and response follow-up

Plan and operate marketing from Campaigns, connect responses to people and deals, record expenses, and interpret attribution without overstating causality.



Treat campaign membership, journey participation, and timeline activity as related evidence, not interchangeable measures.

Before you begin

You need access to the Campaign, its members, the customer or deal records being influenced, and any Expense, report, journey, or communication feature used by the process. Confirm the Campaign owner, audience, dates, response-status policy, consent boundary, cost convention, and success measure before launch.

Find marketing work

From the App Launcher, open **8020CRM**, then **Campaigns** and the intended Campaign. "Marketing" is the business function and also appears as a tab on Lead, Opportunity, Property Transaction, Contact, and Account pages. Those record tabs bring campaign membership, journey, and response context into the customer or deal view.

Use the Campaign record for the initiative and its audience. Use the Lead, Contact, Opportunity, or Property Transaction for the current customer or deal. Do not use a Campaign as a substitute for

qualification, ownership, or transaction state.

Prepare a Campaign

1. Define the Campaign name, type, status, active period, owner, audience, objective, and budget conventions.
2. Define Campaign Member statuses and identify which status represents a meaningful response.
3. Add or import the intended Leads and Contacts, using the organization's duplicate and consent controls.
4. Confirm source, market, segmentation, and any connected journey or outreach configuration.
5. Record planned and actual costs consistently, including related Expense records when used.
6. Test with a small audience before broad execution.

Handle responses

When a person responds, update the Campaign Member status and continue the work on the person's current Lead or Contact. Confirm ownership, recent activity, source, consent, active Property, and next action. Qualified interest can proceed through Lead conversion and deal creation; nurture or disqualification should preserve the reason and future handling.

The Marketing tab on a customer or deal record helps answer which campaigns and journeys touched it. It does not prove that one campaign caused the final result.

Review Marketing Cloud evidence

The separate **Marketing Journeys** panel shows the person's current journey memberships when Marketing Cloud is configured and the panel can resolve that person. It is not a complete campaign or communication history. The **Stop** and **Stop All Journeys** controls are available only when journey removal is configured for the page and the user has the required access; use them only under the organization's approved suppression or service process.

Journey removal is asynchronous. After confirmation, a membership can show as stopping while the provider processes the request. Removal prevents future communication from the selected current journey or journeys; it does not erase prior Campaign membership, form submissions, timeline rows, or email results. Refresh the panel and verify the membership state instead of submitting the same removal repeatedly. Salesforce separately documents current journey membership 🟡, journey removal 🟡, and removal-status checks 🟡.

Form submissions and Campaign evidence remain separate rows in the activity timeline; neither proves current journey membership or message delivery. Tracked email result counts can update later as result records arrive and are aggregated. When a count seems incomplete, allow expected processing to finish, then compare the detailed email results, timeline, and customer record before changing campaign or journey data.

Interpret attribution

Attribution depends on recorded relationships, qualifying lifecycle outcomes, dates, status mappings, and the configured analysis period. Opportunity influence and Campaign Statistics can change after conversion, stage changes, transaction changes, or Expenses; reports and dashboards can require a separate refresh.

NOTE

Treat attribution as an operational model based on the data and rules your organization selected. It is evidence for comparison, not exclusive proof of causality.

Completion signals

A Campaign is operationally ready when its dates, owner, audience, statuses, channel configuration, and cost conventions are complete. Response work is complete when the Campaign Member and authoritative customer record agree, the owner is accountable, and the next action is visible. Performance review is ready when Campaign Statistics reconcile to representative source records and Expenses.

If a member or result is missing, check the Campaign, member identity and status, source-record relationship, qualifying lifecycle event, dates, access, and report filters before importing or submitting again. Do not create a duplicate Campaign Member or Expense merely to force a total.

Use Campaign expenses, statistics, and influence for the complete expense and attribution verification procedure and Reports, dashboards, and operational health for governed analysis.

[START HERE](#)

From first contact to close

Follow the 8020CRM journey from intake and qualification through property work, offers, transaction coordination, close, and follow-up.

The 8020CRM journey connects the first expression of interest to a clear business outcome. Seller, buyer, and sourced-property journeys differ, but each should preserve the customer, property, decisions, responsibilities, and next actions from one stage to the next.



Read the lifecycle from left to right while preserving the record and evidence created at each handoff.

Before you begin

Agree on the qualification standards and handoff responsibilities for your organization. Users should know which team owns the relationship, which team owns property-specific operations, and when a proposal or milestone is ready for review.

Work through it

1. **Capture the first contact.** Create or update the Lead with the best available identity, contact, source, market, property, timing, and communication-preference information. Confirm that it is not an avoidable duplicate and that an owner or monitored queue has the next action.

2. **Engage and qualify.** Record calls, messages, appointments, notes, files, and follow-up work. Keep the status aligned with the actual relationship. Record unknowns honestly and create a next step instead of entering unsupported assumptions.
3. **Set up the deal.** When the relationship is qualified, create or connect the customer, Opportunity, Property, and Property Transaction needed for the journey. The Opportunity represents pipeline and commercial progress; the Property Transaction coordinates work for a specific property.
4. **Choose the property strategy.** Review the property identity, available details, freshness, parties, and business direction. Property data can support a decision, but retrieving data does not itself qualify a deal.
5. **Create and manage Offers.** Keep separate proposals as separate Offers when history matters. Record the direction, parties, amount, important terms, expiration, and expected close. Update the outcome only when that business event occurs.
6. **Coordinate contract and closing.** Maintain signed files, parties, obligations, dates, inspections, contingencies, costs, commissions, exceptions, and assigned work from the Property Transaction. Reminders support the team but do not prove that an external obligation was completed.
7. **Reconcile the outcome.** Use an accurate final state for successful, unsuccessful, cancelled, or abandoned work. Confirm current terms, final dates and amounts, completed relationships, remaining follow-up, and campaign context.

Confirm the result

A clean handoff gives the receiving user the correct records, current owner, actual lifecycle state, accepted terms, recent activity, known exceptions, and a clear next action.

After conversion or close, some related records, activity measures, campaign results, or financial totals may appear later. Refresh the connected journey after expected processing completes before comparing reports or changing values again.

If it does not look right

Do not repeat conversion or guided deal setup just because one related record is not immediately visible. First check the customer, Property, Opportunity, Property Transaction, and Offer for partial output. Correct the authoritative record or missing relationship, then verify the connected records again.

If totals differ after close, review the full journey rather than editing several records to make them match. A local value can be correct while another relationship or delayed summary still reflects earlier information.

Related guidance

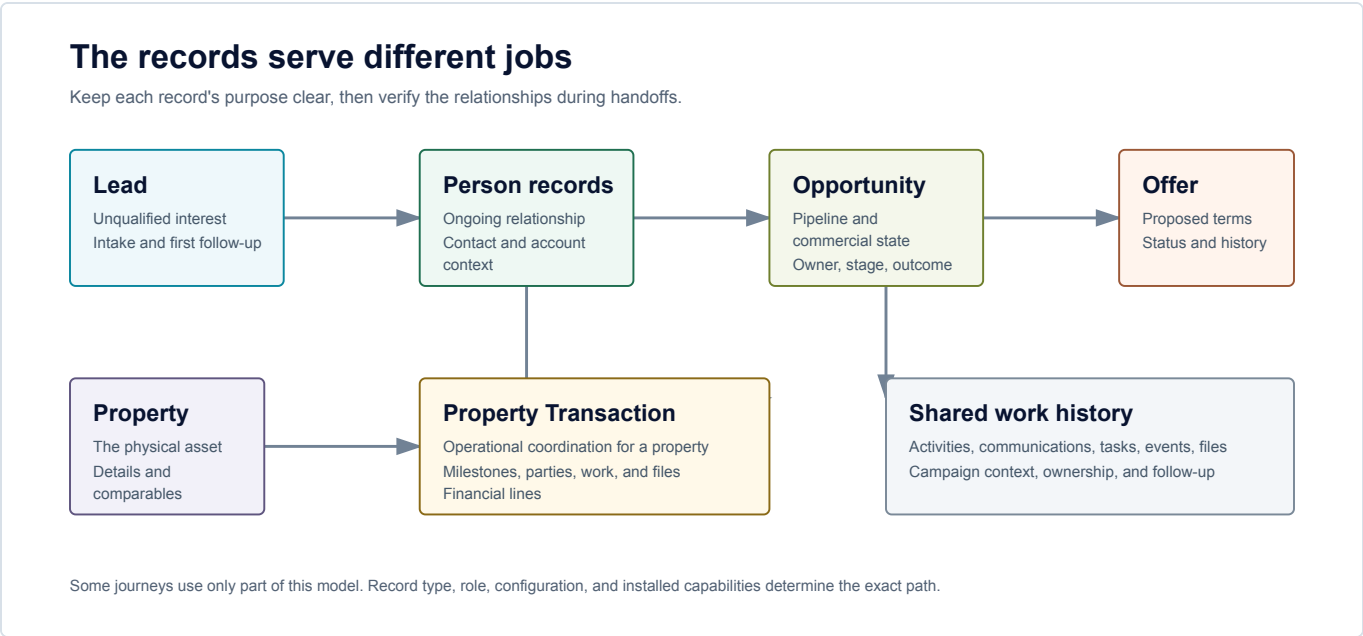
- [Welcome to 8020CRM](#)
- [Lead intake, assignment, and nurture](#)
- [Property details, enrichment, and comparables](#)

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Roles, workspaces, and key records

Match 8020CRM job responsibilities to daily workspaces, record responsibilities, handoffs, and layered Salesforce access.

8020CRM organizes work around business responsibilities while keeping the customer and property journey connected. A person's job determines what they need to do; their license, permissions, sharing, workspace assignment, and feature configuration determine what they can actually see and use.



The Lead starts the conversation, while deal, property, offer, and activity records preserve different parts of the work.

Where to work

Responsibility	Typical starting point	Main records
Lead management	Queue, work list, or assigned activity	Lead, Task, Event, Communication
Sales and acquisitions	Customer or deal record	Lead, Opportunity, Property, Offer

Responsibility	Typical starting point	Main records
Transaction coordination	Operational deal record	Property Transaction, Offer, Task, File
Marketing	Campaign and response work	Campaign, Lead, Opportunity
Management	Reports, dashboards, and exception lists	Operational records and analytics
Administration	Setup and monitoring areas	Users, configuration, schedules, reports

The exact navigation varies by role and organizational configuration. RAIN OS capabilities appear only where they are configured and authorized. RAIN Intelligence is optional.

Work through it

1. Start from Home, a queue, a list, or an assigned activity, then open the intended business record.
2. Review the owner, current lifecycle state, recent activity, related records, and open work.
3. Launch guided work from the record that supplies the correct context. Starting from the wrong customer, property, deal, or campaign can relate the result incorrectly.
4. Update the record responsible for the fact. Sales may maintain pipeline progress on the Opportunity while transaction users maintain operational milestones on the Property Transaction.
5. Before handoff, confirm the relationships, current owner, actual status, known unknowns, files, accepted terms, dates, exceptions, and next Task.

Confirm the result

A user is ready for daily work when they can find their assignments, open both owned and appropriately shared records, complete their principal actions, save related work, and access the reports needed for their role.

A clean handoff means the next person can continue from 8020CRM without updating the same value across several records or rebuilding context from outside the system.

If it does not look right

Access is layered. Use the symptom to narrow the check:

Symptom	Check first
One record is missing	Ownership, team, queue, and sharing
A record opens but a field or action is missing	Role access, record type, page assignment, and visibility
A guided action opens but fails	Access to every record and field involved, not only the starting record
A report or dashboard is missing	Folder sharing and source-record access

Test with the affected user's access. An administrator may see records and actions that a normal user cannot. A visible section also does not guarantee access to every record behind it.

Related guidance

- Setup, access, and launch readiness
- From first contact to close
- Welcome to 8020CRM

Record pages, tabs, and guided workspaces

Understand the packaged Lead, Opportunity, and Property Transaction pages, including abbreviated and role-conditional tabs.

Before you begin

You need access to the intended Lead, Opportunity, or Property Transaction and to the related Property, activities, forms, and records required by the job. From the App Launcher, open **8020CRM**, then use **Leads**, **Opportunities**, or **Property Transactions** to open the authoritative record. Page assignment, record type, profile or permission, app, device, and component visibility can change what appears.

Lead page

Open **8020CRM > Leads > [Lead]**. The default custom Lead page combines highlights, Lead Path, active Property selection, activity tools, the Lead Intake Form, and duplicate review. Its tabs can include:

The demonstration record is synthetic. The complete page shows how record tabs, an active Property, guided forms, Activity Composer, and the utility bar remain in one working context; your assigned page can expose a different subset.

Tab	Meaning
Prop	Select or review the active Property
Details	Review and edit Lead fields
Activity	Review activity measures and Salesforce activity history
Chatter	Collaborate on the Lead record
Marketing	Review journeys and Campaign relationships
Related	Review all related lists available to the user

Use the Lead Intake Form for qualification and intake detail; use Details for a direct field review. Confirm the active Property before conversion.

Opportunity page

Open **8020CRM > Opportunities > [Opportunity]**. The Opportunity page has a general record tabset and a lifecycle workspace. General tabs can include **Prop, Opp, Contacts, Team, Activity, Chatter, Marketing**, and **Related**.

The lifecycle workspace can include:

Tab	Meaning and visibility
Acq	Acquisition form for eligible investment opportunities
Buy/Sell	Retail form for eligible retail buyer or seller opportunities
Lead	Opportunity Intake Form
Appts	Appointment and Event viewer
Offers	Offers related to the Opportunity
Financials	Products, costs, or related financial detail available to the user

Prop means Property context, **Opp** means Opportunity detail, and **Acq** means Acquisition. These abbreviations are page labels, not separate record types.

Property Transaction page

Open **8020CRM > Property Transactions > [Property Transaction]**. The Property Transaction page concentrates deal execution. Its general tabs can include **Contacts, Details, Activity, Chatter, Marketing, Related**, and **Team**. Its lifecycle workspace can include:

Tab	Meaning and visibility
Buy/Sell	Retail transaction form
Dispo	Disposition form for eligible investment transactions
Buyers	Buyer prospects and matching for eligible seller or disposition work
Offers	Offers related to the transaction
TC	Transaction Coordination form for authorized users

Tab	Meaning and visibility
Financials	Transaction economics and related financial records

Dispo means Disposition and **TC** means Transaction Coordination. Tab visibility can depend on record type, lifecycle, custom permission, profile, device, and page activation.

Work safely across tabs

1. Confirm the record name, type, owner, stage, and active Property.
2. Open the tab that owns the job rather than editing the nearest similar value.
3. Save once and confirm the authoritative record.
4. Check related records and summaries after expected automation completes.
5. Create or confirm the next Task or Event.

If a tab is missing, do not assume the feature is uninstalled. Check page activation, app, record type, permissions, form factor, and the tab's visibility condition.

Salesforce owns Lightning page construction, assignment, and activation. Administrators can use the Lightning App Builder , Create a Custom Lightning Record Page , and Activate Lightning Pages  guidance for those platform controls; developers can use the FlexiPage Metadata API reference  for deployment details. This guide defines the intended business purpose of the configured tabs and workspaces, which should be revalidated after a local page change.

The page journey is complete when the authoritative record retains the intended change, related records agree, and the next owner and activity are visible. Use Guided forms by lifecycle for form selection and Administer guided forms and Lightning pages for page placement and activation.

Setup, access, and launch readiness

Prepare 8020CRM for launch by validating releases, access, business configuration, connected services, delayed work, and complete user journeys.

8020CRM is ready to launch when representative users can complete approved business journeys and administrators can confirm both immediate and delayed results. Being able to open the application is not enough; access, configuration, workspaces, connected services, automation, and reporting must work together.



A launch is ready only when capability, access, configuration, data, and the complete journey have all been checked.

Before you begin

Use an approved release plan and a representative test environment. Identify the business owner for each enabled journey and choose normal-user test accounts for every role. Back up business data and organization-managed configuration according to your release policy.

Document the expected operating model, including lifecycle choices, markets, queues, routing, forms, products, campaign conventions, connected services, recurring work, and support ownership.

Work through it

1. **Confirm availability.** Verify that the intended 8020CRM and RAIN OS capabilities are available. Treat RAIN Intelligence and other connected services as optional unless they are separately licensed, configured, and authorized.
2. **Review initialization.** Confirm that organization settings, approved existing values, forms, reference information, and required recurring work are present. Make sure delayed or scheduled work is visible to administrators.
3. **Build access by role.** Start with the maintained access grouping that best matches each job, then add only what the person needs. Confirm licenses, records, fields, actions, pages, sharing, and report folders.
4. **Configure the business model.** Review enabled record types, statuses, stages, lifecycle mappings, markets, queues, assignment, forms, products, financial setup, and reporting periods before exposing entry points to users.
5. **Activate workspaces.** Confirm that intended pages and actions appear for the right roles and devices. Every visible action should have the access and configuration needed to complete its work.
6. **Validate connected services.** Confirm the business purpose, authorized users, service account or sender, capacity, monitoring owner, and support route. Technical connectivity alone does not mean the user workflow is ready.
7. **Run complete journeys.** Test Lead intake and assignment, property work, deal setup, Offers, activities, closing, reports, delayed completion, one controlled failure, and one safe retry for every enabled journey.

Confirm the result

Launch readiness requires normal users to complete their responsibilities, managers to see trustworthy operational results, and administrators to distinguish pending processing from a true failure. Reporting should agree with the tested records after expected delayed work completes.

Keep the release in a controlled validation period through at least one expected recurring cycle. Monitor early assignment, connected requests, failed work, service usage, and reconciliation results.

If it does not look right

Do not enable an incomplete capability for broad use. Restrict its entry point until access, settings, data policy, and downstream processing are ready.

When a test fails, determine whether the initiating record saved, whether part of the related work completed, and whether the remaining step is delayed. Correct the failed stage, then retry once. Avoid repeating the entire journey when valid records already exist.

Related guidance

- Roles, workspaces, and key records
- From first contact to close
- Welcome to 8020CRM

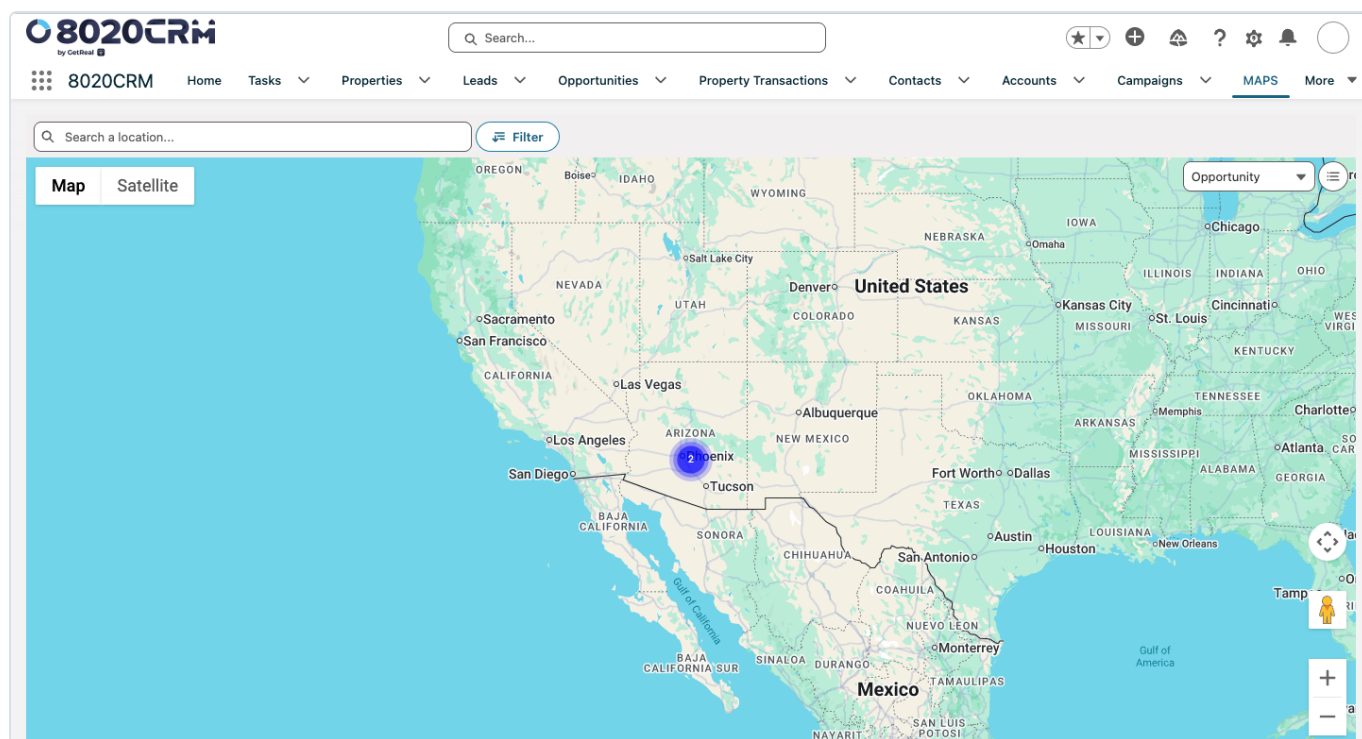
Salesforce owns permission-set configuration, assignment, and effective-access inspection. Use [Permission Sets](#) 🌩, [User Permissions and Access](#) 🌩, [Assign Permission Sets](#) 🌩, and [User Access Summary](#) 🌩 for those platform controls. Then return to the role journey in this guide to verify the complete business task without unrelated elevated access.

FIND AND QUALIFY

Property search and sourcing

Find target properties, preview search volume, bring selected results into 8020CRM, and manage saved searches without creating avoidable duplicates.

8020CRM property sourcing turns a search definition into Property records that can support outreach and active deals. Counting, retrieving, and saving are separate stages, giving you a chance to refine the audience before using paid services or adding records to daily workflows.



The demo map is shown at a broad regional level. Search criteria and available record types vary by configuration.

Before you begin

Confirm that property search is configured, service balance is available, and you can create or update the resulting records. Decide whether the list is for outreach, market monitoring, or a one-property lookup. If the search may create Leads, request contact information, export a file, or update automatically, confirm the business purpose and privacy rules first.

Work through it

1. From the App Launcher, open **8020CRM**, then **Maps**. Open the property-search workspace available there and give the search a distinct name that reflects its market and purpose.
2. Define the location using the options available to your organization.
3. Add only the property, owner, listing, equity, or motivation criteria needed for the business purpose.
4. Request a count. No Property records are expected at this stage. Narrow an unexpectedly broad result before retrieving details.
5. Set a practical result limit and review any export, automatic-update, Lead-creation, or contact options.
6. Retrieve the property details. Larger requests may continue after the page returns control.
7. Review new and existing results separately. An external result may already match a Property in 8020CRM.
8. For an existing Property, choose whether to update available values, replace mapped values, or ignore the result. Replace existing information only when current provider values should take precedence.
9. Select the properties that should become operational records and start the save or follow-on work once.
10. Open a sample of the resulting Properties and confirm identity, address, ownership context, and relationships before outreach or deal work begins.

Confirm the result

The count is complete when a volume appears; retrieval is complete when results are available for review. Saving is complete when selected new Properties exist and selected existing Properties reflect the chosen handling. Follow-on work is complete only when each intended Property has the expected Lead, Prospect, or export relationship.

The count and final total can differ because of result limits, duplicate matching, invalid results, provider changes, or save rules. Use the retained Property records as the inventory for daily work.

If it does not look right

Large retrievals, exports, saved-search updates, Lead creation, and contact work may finish later. Refresh the saved search and inspect resulting records before submitting the same scope again.

Identify the failed stage before retrying. If Properties already exist, repair only the missing Lead, export, contact, or relationship step. Use a small result limit when testing changed criteria or recovering from a failure. Repeating the full search can create another search history entry or duplicate downstream work.

Contact information and ownership data do not establish permission to call, text, or email. Apply your organization's consent, suppression, access, and retention policies before outreach.

Related guidance

- Property details, enrichment, and comparables
- Lead intake, assignment, and nurture
- From first contact to close

FIND AND QUALIFY

Property details, enrichment, and comparables

Refresh a property profile, understand cached and deferred results, review comparable evidence, and save accepted valuation work in 8020CRM.

8020CRM can add available ownership, physical, listing, tax, motivation, media, and comparable information to a Property. A detail refresh supplies facts; a comparable analysis supports a decision. Users remain responsible for selecting meaningful evidence and approving any saved valuation.

RAIN Intelligence can provide an enhanced comparable experience when separately licensed, connected, and authorized. Standard property details and comparable work remain useful without it.

The screenshot displays the 8020CRM interface for a property record. The top navigation bar includes the 8020CRM logo, a search bar, and various menu items like Home, Tasks, Properties, Leads, Opportunities, Property Transactions, Contacts, Accounts, Campaigns, Calendar, RAIN, and More. The main content area is titled 'Property 123 Demo Street' and includes a 'Follow' button and action buttons (Edit, Delete, Skip Trace). Below the title, key statistics are shown: CMA/AVM, Bedrooms (3), Bathrooms (2.00), Living Area, Year Built (1,998), and Lot Size. A large placeholder image for the property is shown with the text 'No photos yet'. To the right, there are sections for 'Media Files', 'Property Transactions (1)', 'Leads (1)', 'Opportunities (1)', and 'Skip Trace (0)'. The 'Details' tab is active, showing a table of information and a 'Get Property Details' button. The bottom status bar shows 'RAIN (6)' and various communication options like GetReal Support, Chatter Feed, Phone, SMS (1), To Do List, and Notes.

Property
123 Demo Street

CMA/AVM Bedrooms 3 Bathrooms 2.00 Living Area Year Built 1,998 Lot Size

Media Files

No photos yet
There are currently no media files for this record.

Details Files

Get Property Details

Information

Property Name	123 Demo Street	Street	123 Demo Street
Parcel Number		City	Phoenix
Subdivision		State	Arizona
County		Zip	85000
Sync Status	No External Sync	Country	US

Description

Property Transactions (1)

Demo Transaction
Lead: Demo Opportunity
Opportunity: Demo Opportunity - 123 Demo Street, Phoenix, AZ...
Skip Trace:

View All

Leads (1)

Follow-Up Demo
Lead Status: Working
First Name: Follow-Up
Last Name: Demo

View All

Opportunities (1)

Demo Opportunity - 123 Demo Street, Phoenix, AZ, 85000
Stage: Appointment
Amount: \$100,000
Close Date: 8/12/2026

View All

Skip Trace (0)

Comm Lines

RAIN (6) GetReal Support Chatter Feed Phone SMS (1) To Do List Notes

Notice that the Property record brings photos, facts, related work, enrichment, and files into one review context.

Understand the available property sources

The details experience can combine saved 8020CRM facts with configured external sources. Source availability varies by organization and property.

Source or signal	What a user can rely on
Zillow	When enabled, a refresh can add available estimate, rent, listing, feature, photo, and source-link information. A recent result can be reused instead of purchasing the same refresh again.
Redfin	When enabled and a property match can be verified, a refresh can add an available estimate, listing or sale context, features, and a source link. No match is a valid outcome.
8020REI sync	A separately configured legacy sync path. A Property can show its sync state, and Select Active Property can show an 8020REI Property Score when the feature is enabled and the record already contains one.
Comparables	Candidate properties and provider facts used to build a saved comparison. A user still chooses which candidates are meaningful.

These signals do not all refresh together or prove the same thing. Check the source link or freshness value before comparing estimates. A displayed **Syncing** state identifies the configured route; it does not prove the external service has completed. The 8020REI controls and score are contextual parts of the Property experience, not a separate 8020REI application in this package.

Before you begin

Confirm that the Property has enough reliable identity information, such as a complete address or parcel and postal context. Correct obvious errors before requesting paid data. Make sure the Property related to the Lead, Opportunity, or Property Transaction is the intended subject.

Work through it

1. From the App Launcher, open **8020CRM**, then **Properties** and the intended Property. If you start from a connected customer or deal record, open its related Property and confirm the address before continuing.
2. Select **Get Property Details** or open the configured property-details experience, then confirm the displayed subject before requesting data.

3. Review the available profile and its freshness. If the information is current enough for the task, use it without forcing another refresh.
4. When details are missing or stale, request one refresh and note whether existing mapped values will be updated or replaced.
5. After completion, compare the displayed profile with the saved Property. Check Zillow and Redfin independently when both are enabled; one source can succeed while the other has no verified match. A value may be visible even when access, validation, or an unsupported choice prevents it from being retained.
6. To build a comparable analysis, review candidate location, property type, size, features, age, distance, and listing or sale facts.
7. Accept only candidates that are meaningful evidence for the subject Property. Save the accepted set before reviewing summaries or weights.
8. Save the estimates your organization uses only after reviewing the selected evidence and assumptions. Record material user adjustments and the analysis date.

A comparable result is an analysis aid, not a certified appraisal or guaranteed value.

Confirm the result

A successful detail refresh shows the intended Property, current detail sections, a current freshness marker, and any expected saved-field changes. A successful comparable save shows an analysis related to the subject Property, the accepted candidate rows, and any deliberately retained estimate.

Candidate previews or map results do not by themselves mean a full analysis ran. For optional RAIN Intelligence work, confirm that the returned analysis is visible and that accepted records or estimates were saved.

If it does not look right

Bulk refreshes, candidate enrichment, weights, and summary values may complete after the parent record appears. Wait for related Properties and analysis rows to settle before editing the accepted set again.

Before retrying a refresh, check the Property identity, freshness, available stored detail, service usage, and pending work. Repeating a request may use additional service balance. For a partial bulk result, retry only failed Properties.

Before repeating a comparable save, confirm which candidates and estimates already exist. Repair an invalid candidate, missing access, or failed relationship instead of creating a second analysis unless a separate analysis is intentional.

Related guidance

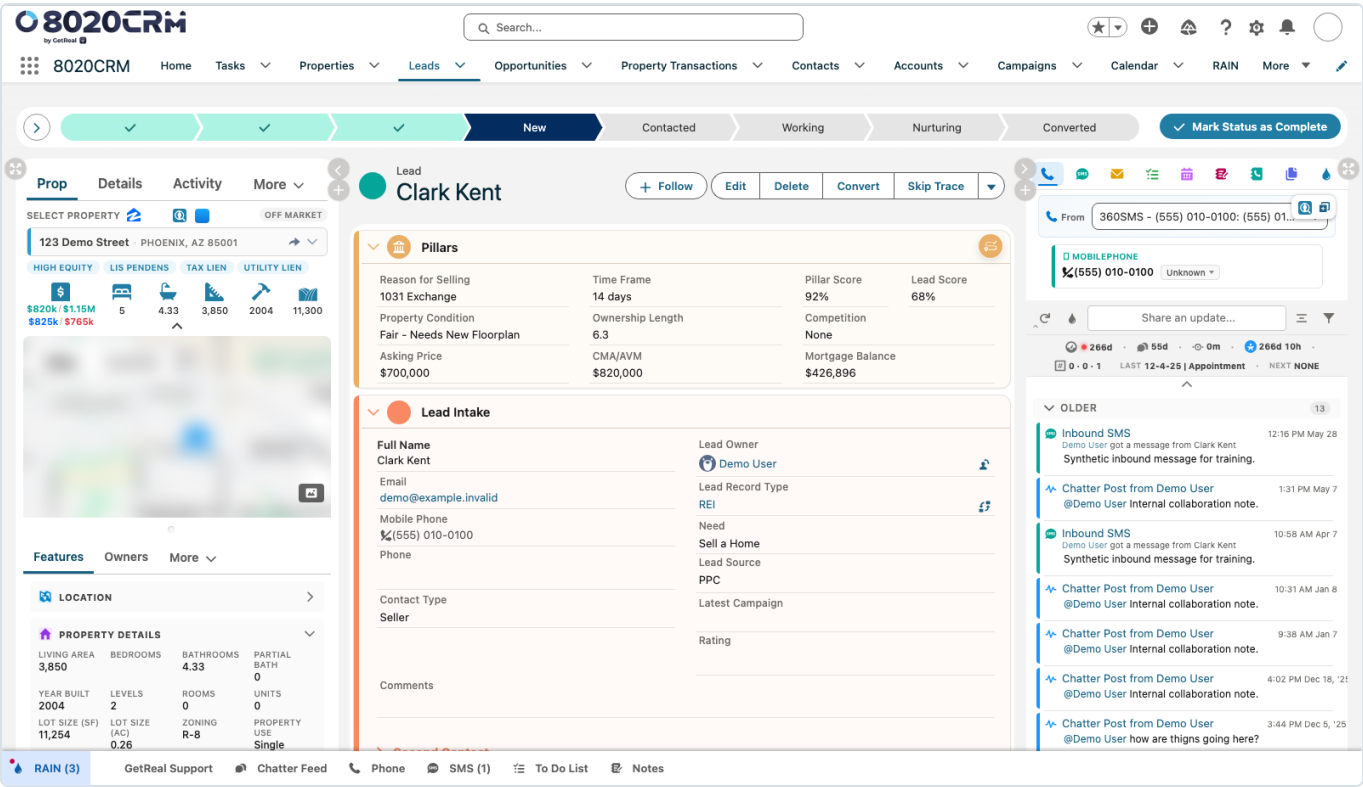
- Property search and sourcing
- Lead intake, assignment, and nurture
- From first contact to close

FIND AND QUALIFY

Lead intake, assignment, and nurture

Capture a complete Lead, route eligible work to the right owner, preserve contact preferences, and move long-term opportunities into nurture in 8020CRM.

Lead intake in 8020CRM should create a workable relationship record, not just a name and phone number. A complete Lead preserves who the person is, why they contacted you, the relevant market or property, communication preferences, the responsible owner, and the next action.



This sanitized demo shows a configured Lead workspace. Labels, tabs, fields, and actions can vary by Lead type, page assignment, enabled integrations, and user access.

I need to...	Use this focused guide
Understand every part of the first Lead screen	Lead intake workspace
Understand status meanings and conversion handoff	Lead, Opportunity, and transaction lifecycle
Complete and interpret qualification scores	Pillars and Lead prioritization

I need to...	Use this focused guide
Diagnose stale work and nurture transitions	Keep Warm and nurturing

Before you begin

Know your organization's minimum intake standard, Lead types, statuses, queues, and qualification rules. Confirm that you can access the intake experience, related Properties, and the activities used for follow-up. Contact enrichment is optional and may require separate authorization and service balance.

Work through it

1. Use the intake channel that matches how the inquiry arrived, such as direct entry, a submitted inquiry, or a selected Property.
2. Search for an existing person before creating a Lead. Review any suggested match using the full identity and context, not a single matching detail.
3. Capture the available name, phone, email, source, need, rating, market, property, address, and comments. Do not infer consent, motivation, or an ownership relationship.
4. Choose the Lead type and initial status that represent the actual business state.
5. Save once, then review the normalized contact and address information, source, lifecycle values, communication preferences, and related Property.
6. Place eligible work in the intended queue or configured intake route. Assignment generally applies to qualifying queue-owned Leads, not every Lead save.
7. Confirm that the owner becomes an active assignee or that the Lead deliberately remains in a monitored queue.
8. Create the first Task, Event, or communication and record its outcome against the correct Lead and business context.
9. Update status and qualification as the relationship develops. Use an unqualified state only after that decision is made and the reason is recorded.
10. When the opportunity is viable but not ready, use the configured nurture path and set a meaningful future follow-up.

Confirm the result

Intake is complete when one intended Lead exists, required information is present, source and property context are correct, and no duplicate decision remains unresolved. Assignment is complete when an accountable user owns the Lead or it remains intentionally in a monitored queue.

Nurture is complete when the Lead has the correct status, owner, reason, and future action. A scheduled transition may not happen immediately when the Lead first becomes eligible.

If it does not look right

Property creation, contact information, activity summaries, assignment notices, and nurture transitions may finish after the Lead saves. Refresh the Lead and inspect related records before repeating intake or routing.

Do not create another Lead because assignment or enrichment is late. Correct the missing stage on the existing Lead. Do not move a Lead in and out of a queue to force routing; this can create repeated notices or replace a deliberate owner choice. Correct the queue, eligibility, or active-user issue, then perform one controlled reassignment.

An available phone number or email address is not consent. Preserve known channel preferences and restrictions, and follow your organization's outreach, access, and retention policies.

Related guidance

- From first contact to close
- Property search and sourcing
- Property details, enrichment, and comparables

FIND AND QUALIFY

Lead intake workspace

Use the configured Lead workspace to verify identity, source, property context, qualification details, activities, and duplicate risk before advancing the relationship.

The Lead intake workspace is the 8020CRM record page for turning an inquiry into a complete, workable Lead. It keeps lifecycle status, the active Property, guided qualification, activities, marketing context, and duplicate review in one record context. Labels, sections, actions, and tabs are configurable and can differ by Lead type, application, device, and user access.

The screenshot displays the 8020CRM interface for a Lead record named 'Clark Kent'. The top navigation bar includes the 8020CRM logo, a search bar, and various menu items like Home, Tasks, Properties, Leads, Opportunities, Property Transactions, Contacts, Accounts, Campaigns, Calendar, RAIN, and More. Below the navigation bar is a progress bar with stages: New, Contacted, Working, Nurturing, and Converted. The main workspace is divided into several sections:

- Prop Details:** Shows property information for '123 Demo Street - PHOENIX, AZ 85001'. It includes a 'SELECT PROPERTY' dropdown, a 'HIGH EQUITY' button, and a 'LIS PENDING' button. The property details table shows: LIVING AREA 3,850, BEDROOMS 4.33, BATHROOMS 4.33, PARTIAL BATH 0, YEAR BUILT 2004, LEVELS 2, ROOMS 0, UNITS 0, LOT SIZE (SF) 11,254, LOT SIZE (AC) 0.26, ZONING R-8, and PROPERTY USE Single.
- Pillars:** A table showing key metrics: Reason for Selling (1031 Exchange), Time Frame (14 days), Pillar Score (92%), Lead Score (68%), Property Condition (Fair - Needs New Floorplan), Ownership Length (6.3), Competition (None), Asking Price (\$700,000), CMA/AVM (\$820,000), and Mortgage Balance (\$426,896).
- Lead Intake:** A section for lead information. It includes fields for Full Name (Clark Kent), Lead Owner (Demo User), Email (demo@example.invalid), Lead Record Type (REI), Mobile Phone ((555) 010-0100), Need (Sell a Home), Lead Source (PPC), Contact Type (Seller), Latest Campaign, and Rating.
- Activity:** A list of recent activities, including 'Inbound SMS' and 'Chatter Post from Demo User'. The activities are dated and include details about the messages and posts.

The demonstration record is synthetic. It shows one configured desktop workspace; your organization can assign different labels, fields, tabs, and visibility rules.

Before you begin

Confirm that you can open the intended Lead, edit the fields required by your intake standard, view related Properties, and create the next Task or Event. Campaign work also requires access to the

relevant Campaign and Campaign Member records. The full configured workspace is optimized for desktop use; mobile and compact assignments can show a smaller set of components.

Administrators should define the organization's Lead record types, configurable status labels and business-meaning mappings, Path configuration, duplicate rules, minimum intake fields, consent controls, and page assignments. Salesforce provides the platform planning questions in Planning Your Leads Implementation 📌.

Work through the workspace

1. From the App Launcher, open **8020CRM**, then **Leads** and the intended Lead. Confirm the Lead name, owner, record type, contact details, and current business status before editing.
2. Review the duplicate preview. Compare full identity and contact context before deciding whether to continue, merge, or use an existing record.
3. Use Path as a visual status control, then confirm that the selected status reflects the actual business state. Salesforce explains the platform control in Path Overview 📌 and Visualize Success with Path and Kanban 📌.
4. On **Prop**, select or verify the active Property. Check the address and distinguishing facts before using property details in qualification.
5. In **Lead Intake**, complete identity, contact, Need, Lead Source, Latest Campaign, rating, and comments as known. Need, Lead Source, Contact Type, and record type are part of the seeded intake standard; additional requirements can be configured.
6. Complete the sections that appear for the selected Need. Seller-oriented work can expose Property, Occupancy, Condition, Motivation, and Financials. Buyer-oriented work can expose Buy Box, Motivation, and Financials.
7. Review **Pillars** for qualification inputs and the separate Pillar Score and Lead Score. Use Pillars and Lead Prioritization before interpreting either score.
8. Review marketing context. The seeded guided form exposes Lead Source and Latest Campaign. Its Marketing subsection exposes consent, suppression, and referral controls. The page's Marketing tab can show Campaign membership and configured engagement results.
9. Create or confirm the next Task, Event, call, message, or note against this Lead. The activity record, not a free-form comment, should carry the accountable next step.
10. Save once, refresh, and confirm the Lead, active Property, Campaign context, and next activity before leaving the record.

8020CRM also stores optional campaign-tracking parameters and advertising click identifiers on Leads. Their presence in the data model does not prove that a specific website, import, or

integration populates them, and they are not exposed in the seeded guided Lead Intake form. Administrators should verify each channel's field mapping before relying on those values for attribution.

Confirm the result

The workspace is complete when one intended Lead exists, the owner and mapped business status are correct, the active Property matches the inquiry, required visible sections save without error, source and Campaign context are supportable, and a dated next activity identifies who acts next. A duplicate warning must be resolved or deliberately reviewed, not ignored.

Troubleshooting

Symptom	Check first
Lead Intake or a section is missing	Active page assignment, application, record type, device, form activation, Need, field access, and configured visibility
Path is missing or shows unexpected values	Path activation, record type, selected status field, configurable label mapping, and page assignment
Wrong Property appears	Active Property selection, address identity, duplicate Properties, and the Lead-to-Property relationship
Duplicate preview appears	Existing Leads, Contacts, and Accounts; normalized phone and email; and the organization's matching rules
Latest Campaign is blank	Intake source, selected Campaign, Campaign access, member creation, and channel mapping
A marketing tracking field is blank	The originating channel's verified mapping; do not assume the guided form captures it
Save fails	Visible required fields, conditional requirements, allowed values, field access, validation, duplicate rules, and related-record access
Activity is missing after save	Activity parent, owner, save result, record access, and pending activity-summary refresh

Salesforce owns matching rules, duplicate rules, and standard duplicate alerts; see [Manage Duplicate Records](#) 🔗. 8020CRM owns the configured workspace arrangement, guided intake

sections, active-Property context, score surfaces, and related workflow guidance. Page assignment, field visibility, status labels, Campaign conventions, and duplicate policy remain administrator-owned configuration.

Best practices

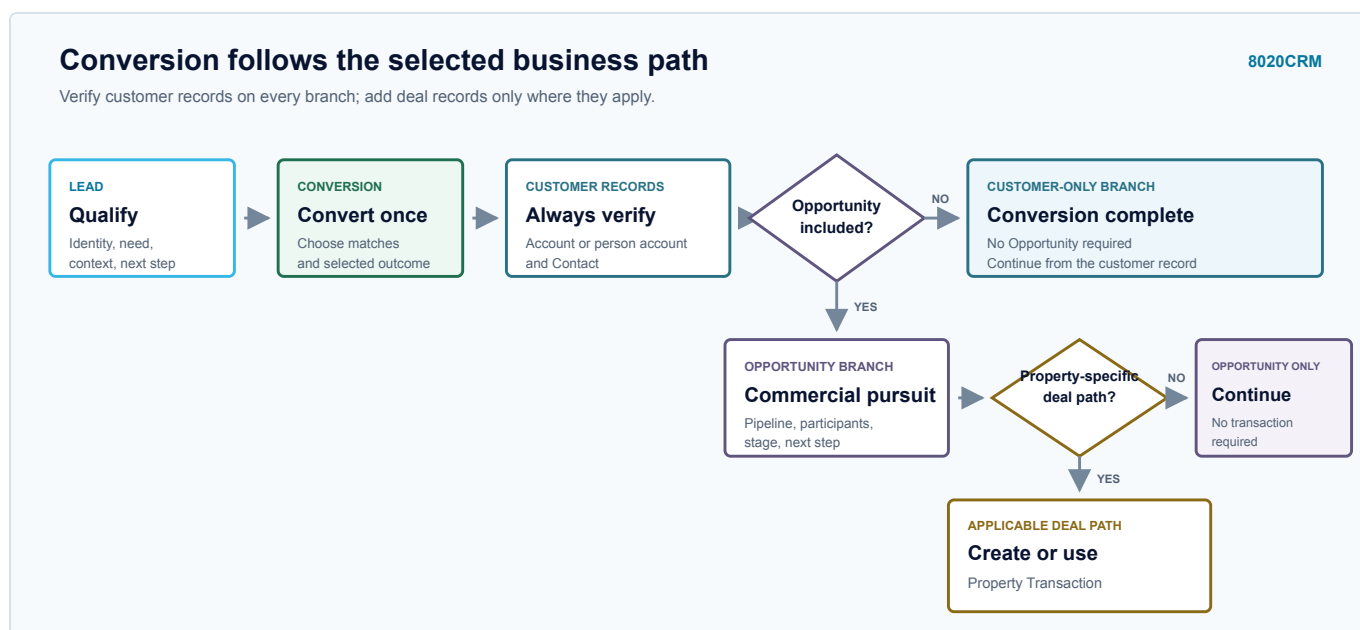
- Search and review duplicate candidates before adding detail to a new Lead.
- Keep one active Property clearly selected when the inquiry is property-specific.
- Record facts and consent evidence, not assumptions, in controlled fields where possible.
- Treat Lead Source, Latest Campaign, Campaign membership, and tracking parameters as different attribution facts.
- Save and verify before changing status or starting conversion.
- End every intake session with an accountable owner and dated next activity.

For an additional product walkthrough, see [Managing Leads in 8020CRM](#)  and the [Managing a Lead](#) video . Use this current guide and the assigned workspace when older media shows different labels, fields, or tabs.

Lead qualification, conversion, and deal handoff

Qualify a Lead, convert it once, and verify the customer records plus any applicable Opportunity and Property Transaction handoff without duplicating records or losing context.

The 8020CRM customer lifecycle uses a Lead for pre-conversion discovery and customer records after conversion. A conversion can finish without an Opportunity. When the selected path includes an active commercial pursuit, the Opportunity owns that work; only an applicable property-specific deal path creates or uses a Property Transaction for operational and closing work.



Interpretation: customer records complete every successful conversion. An Opportunity is optional, and a Property Transaction is created or used only when the applicable deal path requires property-specific execution.

Understand the business meanings

Lead status labels are configurable and can be mapped in each subscriber organization. Use the durable meaning, not spelling alone, when deciding what happens next.

Durable meaning	What it represents	Normal next step
Early prospect	A possible relationship that has not met the organization's intake standard	Validate identity, relevance, and permission to engage
New inquiry	An accepted inquiry awaiting timely review or response	Assign an owner and make the first attempt
Contact attempted	Outreach has begun, but active qualification is not established	Record the attempt and schedule the next action
Active qualification	Two-way discovery is underway	Complete need, property, timing, authority, motivation, and financial context
Near-term nurture	The relationship remains viable but active progression is paused	Preserve owner, reason, review date, and appropriate outreach
Long-horizon nurture	The relationship may matter later but is outside the active working horizon	Use a longer review cadence and avoid active-pipeline inflation
Qualified	The organization has enough evidence to open an active deal	Convert once and verify all resulting relationships
Unqualified	The current relationship does not meet the active pursuit standard	Record a controlled reason and close or retain according to policy

Continue on the authoritative record

Record	User-visible entry	What it owns after the handoff
Lead	App Launcher > 8020CRM > Leads	Pre-conversion identity, source, consent, qualification, active Property, and the mapped Lead status meaning
Opportunity	App Launcher > 8020CRM > Opportunities	When included in the conversion path, the active commercial pursuit, pipeline stage, participants, next step, and relationship-level outcome
Property Transaction	App Launcher > 8020CRM > Property Transactions	When the deal path requires it, property-specific execution, transaction stage, Offers, milestones, parties, Files, financial context, and closeout

Opportunity and Property Transaction stages vary by deal type and organization configuration. Use Investment seller lifecycle, Retail buyer lifecycle, or Retail seller lifecycle for the ordered post-conversion journey instead of treating a copied status value as the lifecycle contract.

Before conversion

Confirm the Lead's identity, owner, record type, Need, source, active Property, contact preferences, qualification evidence, and next commercial step. Review duplicate candidates and decide whether the conversion should use existing customer records. Salesforce explains matching and duplicate controls in [Manage Duplicate Records](#) and [Resolve and Prevent Duplicate Data](#).

Do not convert merely because a score is high or a Path step is available. Qualified means the team is ready for the intended customer or deal outcome and can identify the customer, need, relevant property or search context, and immediate next step.

Convert and establish the deal

1. Resolve obvious Lead, Contact, Account, and Property duplicates.
2. Set the Lead to the organization's mapped qualified meaning only when the qualification standard is met.
3. Start the approved conversion path and select the intended existing or new customer records.
4. Confirm the Account or person-account choice, Contact, owner, converted status, and whether this conversion should include an Opportunity.
5. Submit once. Salesforce describes the standard transaction in [Create and Convert Leads as Potential Customers](#) and [Convert Qualified Leads](#).
6. Open the resulting customer record and Contact. Confirm identity, ownership, contact information, and source context.
7. If the conversion did not include an Opportunity, verify that the converted Lead and customer records are the intended result. Conversion can be complete on this branch; do not treat the absent Opportunity or Property Transaction as an error.
8. If the conversion included an Opportunity, open it and confirm its record type, owner, primary participant roles, Need, Campaign context, Lead Score at conversion, and initial stage.
9. Only when the Opportunity follows an applicable property-specific deal path, confirm that the correct Property Transaction was created or reused and that it points to the intended Opportunity and Property. Do not create one solely because the Lead was converted.

10. Refresh before repairing late activity, Campaign, communication, or transaction context. Some reconciliation occurs after the main conversion commit.
11. Create or confirm the next Task, Event, Action Plan, or transaction milestone on the record where the post-conversion team will work.

Salesforce conversion moves standard Lead context according to platform rules, including activities and Campaign membership, and it can complete without an Opportunity. Review Considerations for Converting Leads  before changing field mappings, validation, duplicate behavior, person-account handling, or conversion permissions. When an Opportunity is present, 8020CRM carries supported deal context forward and establishes property and transaction relationships only for eligible paths.

Confirm the result

Every successful branch ends with a converted Lead and the intended customer and Contact. A customer-record-only conversion has no Opportunity and needs no Property Transaction. When the approved conversion path includes an Opportunity, exactly one intended Opportunity represents the active pursuit. When that Opportunity follows an applicable property-specific deal path, its Property Transaction points to the correct Property and the records point to each other. Owners, record types, lifecycle values, participant roles, source context, and next activity agree with the selected branch.

The converted Lead remains historical intake evidence. Continue customer-only work from the appropriate customer record, commercial work from the Opportunity when one exists, and property-specific execution from the Property Transaction when that path applies.

Troubleshooting

Symptom	Check first
Status label is unfamiliar	The organization's configurable mapping to the durable business meaning
Conversion action is missing	Convert permission, page action, Lead state, application, device, and record access
Conversion is blocked	Required fields, validation, duplicate decision, target access, record types, and allowed values

Symptom	Check first
Wrong customer record was selected	Matching candidates, person-account behavior, full identity, and the selection made at conversion
Converted Lead has no Opportunity	The selected conversion option and intended business path; this is valid when the conversion was meant to create customer records only
Opportunity exists but Property Transaction is missing	Whether the deal path requires a Property Transaction, then the active Property, record type compatibility, pending reconciliation, validation, and automation errors
Opportunity and transaction disagree	Direct relationship, current owner of each field family, status/stage mapping, pending work, and competing edits
Activities or Campaign context appear late	Refresh, standard conversion handling, relationship access, and deferred reconciliation
Duplicate deal records exist	Repeated conversion or repair attempts, existing Opportunity and transaction relationships, and duplicate policy

Best practices

- Publish one qualification standard for each Lead type.
- Map configurable status labels to durable meanings and test the full downstream lifecycle after changes.
- Convert once, then repair the existing result rather than repeating the transaction.
- Use the Opportunity only when there is an active commercial pursuit, and use the Property Transaction only when the deal path requires property-specific execution.
- Preserve source, Campaign, consent, activity, and score-at-conversion evidence through the handoff.
- Reconcile relationship integrity before advancing stages, sending notices, or starting close work.

The 8020CRM process flow [📄](#), status and stages overview [📄](#), detailed status and stage article [📄](#), and interactive process funnel provide additional business context. Some labels and automation notes in those earlier resources can predate current mappings; use the durable meanings and current organization configuration in this article as the operating contract.

FIND AND QUALIFY

Pillars and Lead prioritization

Complete the qualification pillars, distinguish Pillar Score from Lead Score, and use both as supporting signals rather than automatic decisions.

Pillars in 8020CRM organize the core discovery facts used to evaluate a Lead. Pillar Score and Lead Score are separate read-only percentages: Pillar Score summarizes the primary qualification domains, while Lead Score adds broader source, stage, property, engagement, recency, and decision-context signals.

The screenshot displays the 8020CRM interface for a lead named Clark Kent. The top navigation bar includes sections for Home, Tasks, Properties, Leads, Opportunities, Property Transactions, Contacts, Accounts, Campaigns, Calendar, RAIN, and More. A search bar is located in the top right. Below the navigation bar, a lead status flow shows stages: New, Contacted, Working, Nurturing, and Converted. The lead profile for Clark Kent is shown, with a 'Prop' tab selected. The 'Prop' tab displays property details for 123 Demo Street, Phoenix, AZ 85001, including a listing price of \$820k, a list price of \$1.15M, and a tax lien of \$825k. The 'Pillars' section shows a Pillar Score of 92% and a Lead Score of 68%. The 'Lead Intake' section shows contact information for Clark Kent, including email (demo@example.invalid) and mobile phone ((555) 010-0100). The 'Activity' section shows a list of messages, including inbound SMS and chatter posts from Demo User.

Field	Value
Reason for Selling	1031 Exchange
Time Frame	14 days
Pillar Score	92%
Lead Score	68%
Property Condition	Fair - Needs New Floorplan
Ownership Length	6.3
Competition	None
Asking Price	\$700,000
CMA/AVM	\$820,000
Mortgage Balance	\$426,896

Field	Value
Full Name	Clark Kent
Lead Owner	Demo User
Email	demo@example.invalid
Lead Record Type	REI
Mobile Phone	(555) 010-0100
Need	Sell a Home
Phone	
Lead Source	PPC
Contact Type	Seller
Latest Campaign	
Rating	
Comments	

Activity	Time
Inbound SMS: Demo User got a message from Clark Kent. Synthetic inbound message for training.	12:16 PM May 28
Chatter Post from Demo User: @Demo User internal collaboration note.	1:31 PM May 7
Inbound SMS: Demo User got a message from Clark Kent. Synthetic inbound message for training.	10:58 AM Apr 7
Chatter Post from Demo User: @Demo User internal collaboration note.	10:31 AM Jan 8
Chatter Post from Demo User: @Demo User internal collaboration note.	9:38 AM Jan 7
Chatter Post from Demo User: @Demo User internal collaboration note.	4:02 PM Dec 18, '21
Chatter Post from Demo User: @Demo User how are things going here?	3:44 PM Dec 5, '25

The scores and fields shown are calculated from synthetic data. Available inputs and labels can vary by Lead type and configuration.

Know the difference

Signal	What it summarizes	How to use it
Pillar Score	Condition, timing, motivation, financial or value context, and competition	Check whether the primary qualification story is strong and complete enough for a business decision
Lead Score	Pillar Score plus broader Lead source, rating, property context, business stage, recency, activity, decision-maker, and engagement signals	Order review within a work queue while still applying urgency, consent, fit, and human judgment

The two scores should not match. Changing a pillar answer can affect both scores, while a new activity or stage change can affect Lead Score without changing Pillar Score. No score is proof of consent, identity, legal authority, property ownership, affordability, or readiness to convert.

Complete and use Pillars

1. Open the intended Lead and verify its active Property and Need.
2. Expand **Pillars** or use the configured qualification action.
3. Record the facts learned about condition, time frame, motivation, financial or value context, and competition. Use comments for concise supporting context, not unsupported conclusions.
4. Save and refresh the Lead. Salesforce formula fields are read-only and recalculate from their referenced data; see [Build a Formula Field](#) and [Get Started with Formulas](#).
5. Inspect both scores and the underlying facts. A low result can mean weak fit, stale engagement, or incomplete data.
6. Prioritize the Lead alongside response urgency, owner, next activity, communication restrictions, and the team's service standard.
7. Update the business status only when the durable status meaning is true. Do not move a Lead to qualified merely to raise or preserve a score.
8. At conversion, verify the Lead Score copied to the Opportunity. It is a conversion-time reference, not a live continuation of the Lead formula.

Salesforce defines the standard Lead record and conversion fields in the [Lead Object Reference](#). 8020CRM owns the Pillars, score definitions, workspace presentation, and conversion-time score carry-forward. Administrators own access, list views, reports, and the business policy for how scores may influence work ordering.

Confirm the result

The visible pillar answers match the conversation and active Property, both score labels are distinct, and a refresh shows a result consistent with the saved facts. The owner and next activity explain what happens next even if no score is visible. After conversion, the Opportunity's Lead Score reflects the score captured at handoff.

Troubleshooting

Symptom	Check first
Pillars section is missing	Active page and form, record type, Need, section activation, device, and field access
Pillar Score is unexpectedly low or blank	Missing condition, timing, motivation, value, or competition inputs and field access
Lead Score is unexpectedly low	Pillar completeness, Lead Source, rating, property context, mapped business stage, recent activity, decision context, and engagement data
Score did not change after an edit	Save result, refresh, edited record, referenced field, conditional section, and pending activity tracking
Pillar Score and Lead Score disagree	Expected behavior; compare their different input families rather than expecting equality
Opportunity score differs from the current Lead	The Opportunity stores the conversion-time Lead Score while the Lead formula can continue to recalculate
List view and open record differ briefly	Refresh the list and record, then verify activity-summary processing and field access

Best practices

- Complete underlying facts before interpreting either score.
- Compare similar Lead types and lifecycle meanings rather than treating every Lead as one cohort.
- Never infer consent or protected personal characteristics from a score.
- Use scores to order review, not to deny service or replace qualification policy.
- Investigate missing data before interpreting a low score as poor fit.

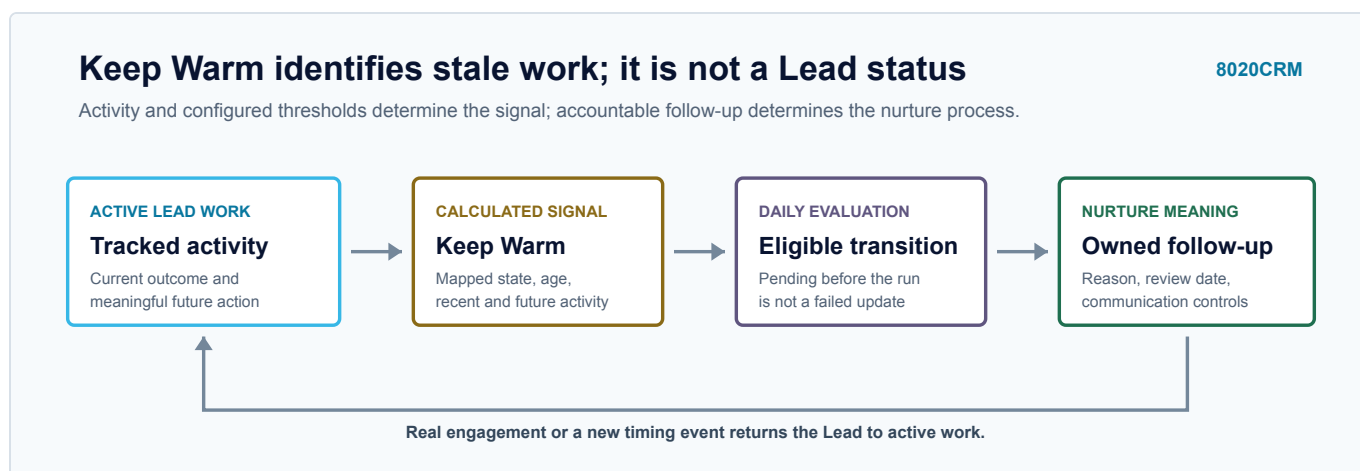
- Revalidate score use after changes to fields, status mappings, forms, activity tracking, or reports.

The 8020CRM Pillars video  provides a visual introduction. Use the current field labels and score behavior documented here when an older recording differs from the assigned form.

Keep Warm and nurturing

Interpret Keep Warm as a stale-work signal, manage the daily transition to near-term nurture, and preserve accountable follow-up for viable Leads.

Keep Warm is a calculated stale-work signal in 8020CRM. It is not a Lead status, rating, or user-entered decision. The signal identifies contacted or actively worked Leads whose status age and tracked activity dates have crossed administrator-configured limits, allowing daily automation to move eligible records into the configured near-term nurture meaning.



Keep Warm is a recurring review state: continued inactivity sustains nurture, while genuine engagement returns the Lead to active follow-up.

Before you begin

Users need access to the Lead and its Tasks, Events, and communications. Administrators should confirm that status labels map to durable business meanings, activity tracking is current, separate stale thresholds are configured for contacted and working Leads, the feature is enabled, and the daily process is active. Salesforce outlines status and routing planning in [Planning Your Leads Implementation](#) 🌩.

The nurture team also needs an operating rule for owner, reason, review date, outreach eligibility, and reactivation. A status change by itself is not a nurture program.

Understand the signal and transition

Keep Warm considers the Lead's mapped business state, time in that state, recent tracked activity, next activity, and furthest scheduled activity. A recent engagement or suitable future activity can keep the signal false. Missing or stale activity can make it true once the applicable configurable threshold is crossed.

The active schedule evaluates eligible Leads daily. Salesforce explains how schedule-triggered automation processes matching records in Schedule a Flow [🔗](#). 8020CRM supplies the stale-work criteria and nurture update; Salesforce owns the schedule-triggered Flow runtime.

Work a Keep Warm Lead

1. Open the Lead and verify that **Keep Warm** is a signal, not the displayed status.
2. Review the current mapped business meaning, last meaningful activity, next activity, furthest future activity, owner, and recent conversation outcome.
3. If the Lead is actively progressing, record the missing activity against the correct Lead and create the real next Task or Event. Refresh after activity tracking completes.
4. If the Lead is viable but not ready, preserve the reason, owner, review date, communication eligibility, and an appropriate nurture Task, Action Plan, or Campaign relationship.
5. Allow the daily process to move eligible stale work to the configured near-term nurture meaning. Do not force the transition by repeatedly changing status.
6. Distinguish near-term nurture from long-horizon nurture. Use the latter only when the relationship is relevant but outside the active working horizon.
7. To reactivate, confirm a real engagement or new timing event, select the configured active-working status meaning once, remove obsolete tasks, and create the next dated action.

Path can display the organization's configurable status labels, but it does not change the Keep Warm definition. Visualize Success with Path and Kanban [🔗](#) explains the Salesforce status control; 8020CRM determines the stale signal and nurture workflow described here.

Confirm the result

For active work, the Lead has a current activity and meaningful future action, and Keep Warm recalculates as expected after refresh. For nurture, the Lead has the configured near-term or long-horizon business meaning, an accountable owner, a documented reason, communication controls, and a future review mechanism. A Keep Warm signal that is true before the daily run is pending, not a failed status change.

Troubleshooting

Symptom	Check first
Keep Warm is false when the Lead seems stale	Eligible mapped business state, status age, recent activity, future activity, configurable threshold, and refresh
Keep Warm remains true after follow-up	Activity parent, completion date, next or furthest activity date, activity tracking delay, and whether the Lead was refreshed
Lead did not enter near-term nurture	Feature disable setting, daily process status, eligible business meaning, status mapping, automation errors, and whether the daily run has occurred
Status changed but no nurture work exists	Expected unless a separate Task, Action Plan, Campaign, or outreach process was configured; create the accountable follow-up
Lead entered nurture unexpectedly	Incorrect activity relationship, stale or missing future activity, threshold configuration, status mapping, and competing automation
Reactivated Lead returns to nurture	No current or future activity, obsolete mapped status, unresolved tracking delay, or threshold crossed again

Best practices

- Treat Keep Warm as an operational exception, not a quality judgment.
- Configure thresholds through supported administration and review the impact in a representative test environment.
- Keep separate queues or views for active work, near-term nurture, and long-horizon nurture.
- Require an owner and future review mechanism for every nurtured Lead.
- Preserve consent and suppression controls; nurture does not authorize communication.
- Measure reactivation and aging by durable business meaning so configurable labels do not fragment reporting.

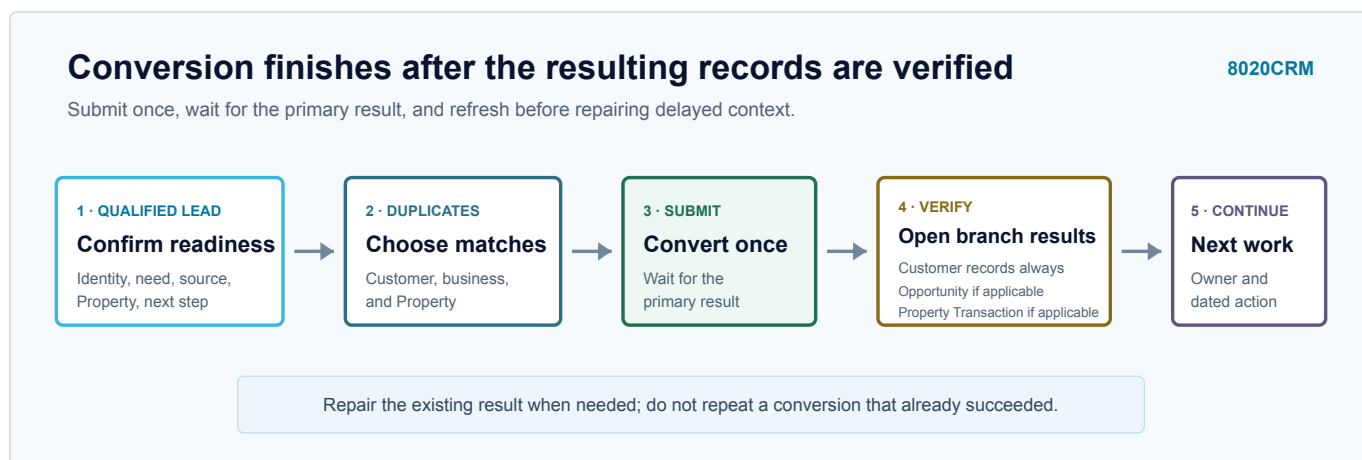
The 8020CRM status and stages overview  provides broader funnel context. Keep Warm should still be interpreted from this current article as a calculated stale-work signal, not as another lifecycle status.

Lead conversion and deal setup

Convert a qualified Lead once, verify the resulting customer records, and establish an Opportunity and Property Transaction only when the selected deal path requires them.

What this helps you do

Convert a qualified Lead into the customer records your team will use in 8020CRM and, when selected, the applicable deal records. Conversion is complete after you confirm the records produced by that branch are connected correctly and the next action is assigned.



Interpretation: "branch results" means the records produced by the selected path. Conversion can end with customer records only; Opportunity and Property Transaction checks apply only when those branches are used.

Where to work

Begin on the qualified Lead. After conversion, use the customer record for a customer-only outcome. If the path includes an Opportunity, use it for the sales relationship and pipeline stage. If that deal path requires a Property Transaction, use the transaction for property-specific work, parties, offers, dates, and activity. The converted Lead remains the history of the original intake.

Before you begin

Confirm the Lead meets your organization's qualification standard. Review the person's identity, contact information, source, owner, Lead type, intended deal type, current status, property or buying need, and next commercial step. Resolve obvious duplicate people, businesses, and Properties before converting.

Salesforce owns matching rules, duplicate rules, and standard duplicate alerts. Use Duplicate Management Overview  and Resolve and Prevent Duplicate Data  for those platform controls. This guide defines the customer, property, and deal relationships that still need business verification before conversion.

Also review open Tasks, Events, notes, Files, campaign history, and Action Plans. Confirm you can convert Leads and access the customer, deal, and property records involved.

Salesforce owns the standard Lead feature and visual stage controls. Administrators can use Plan Your Lead Implementation  and Path Overview , while users can review Visualize Success with Path and Kanban . The configured qualification values and downstream property relationships remain part of the business workflow described here.

Work through it

Selected branch	Result to verify
Customer records only	Converted Lead, Account or person account, and Contact; no Opportunity or Property Transaction is required
Commercial pursuit	Customer records and one intended Opportunity; a Property Transaction is not assumed
Property-specific deal	Customer records, one intended Opportunity, and the applicable new or existing Property Transaction

1. Open the qualified Lead and verify the owner, source, primary contact information, and business need.
2. If the Lead concerns a specific property, confirm the active Property is the correct one.
3. Search for an existing Account and Contact for the same person or business. Use a verified match; otherwise create the appropriate new records during conversion.
4. Choose the intended branch. If an Opportunity is needed, confirm its deal type, owner, initial stage, and required information. If it is not needed, confirm that customer records only are the intended result.

5. Start conversion once and wait for the result. Do not open a second attempt in another tab.
6. Open the resulting Account and Contact. Confirm identity, ownership, contact information, and source context.
7. On the customer-record-only branch, confirm the Lead is converted and no Opportunity was intended. The conversion is complete without an Opportunity or Property Transaction.
8. On a commercial-pursuit branch, open the Opportunity and confirm the intended customer, primary Contact, deal type, owner, stage, and source context.
9. Only on an applicable property-specific deal branch, open the Property Transaction. Confirm it is the intended new or existing transaction and that it agrees with the Opportunity on Property, primary Contact, deal type, owner, and compatible lifecycle status.
10. Review related activities, notes, Files, campaigns, and plans. Create or confirm the next Task, appointment, Action Plan, or guided work item on the record that owns the next work.

Salesforce owns the base conversion transaction, including the option to complete conversion without an Opportunity; see [Create and Convert Leads](#) 🗨️, [Convert Leads](#) 🗨️, and [Lead Conversion Considerations](#) 🗨️ for standard behavior. This guide adds the conditional deal-record checks and delayed-work precautions required after that platform transaction completes.

Confirm the result

The Lead shows that it was converted and links to the expected customer records. On a customer-record-only branch, no Opportunity or Property Transaction is expected. On a commercial-pursuit branch, the intended Opportunity opens and agrees with the customer records. On an applicable property-specific deal branch, the Opportunity and Property Transaction also agree on the customer, Property, owner, deal type, and current business state. The next activity is visible where the team will perform the work.

Some related history may appear after the primary conversion succeeds. Refresh the new records and allow delayed updates to finish before deciding that an activity, note, campaign relationship, or summary is missing.

If it does not look right

- If conversion is unavailable or blocked, recheck Lead status, required information, duplicate choices, allowed values, permissions, and access to the intended records.
- If the Lead already shows as converted, do not convert it again. Repair the missing or incorrect relationship on the existing records.

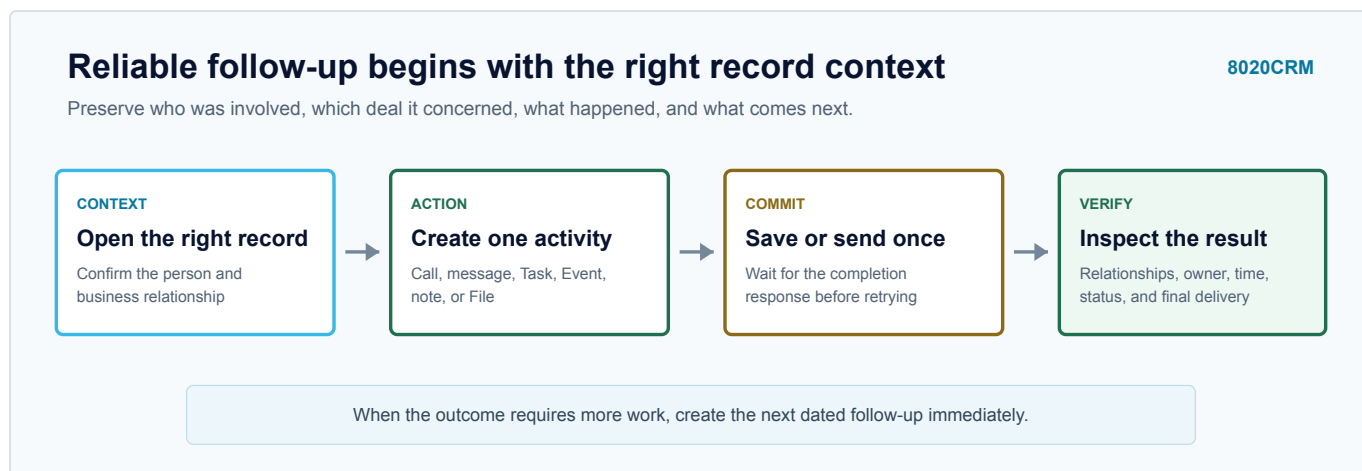
- If the Lead is converted without an Opportunity, verify the selected branch before treating the result as incomplete. A customer-record-only conversion is valid.
- If the Opportunity exists without a Property Transaction, first confirm that the deal path requires one. If it does, refresh and review the Property relationship before creating anything manually.
- If the first attempt failed, check whether any customer or deal records were created. Correct the specific issue, then retry once.
- Avoid repeatedly changing stages to force an update; stage changes can create duplicate notices, Tasks, or other follow-up.

Related guidance

Activities, communications, and follow-up explains how to continue work from the converted deal. Use the applicable investment seller, retail buyer, or retail seller lifecycle for the next business stage.

Activities, communications, and follow-up

Record calls and messages, schedule Tasks and Events, preserve the correct record context, and verify follow-up outcomes in 8020CRM.



Interpret activity success through three checks: correct record context, a durable activity entry, and delivery evidence when a provider is involved.

What this helps you do

Keep a reliable history of what happened, what is scheduled, and what should happen next. Correct activity relationships help the team understand the person involved, the active deal, the owner, and the expected follow-up.

Use Activity Composer for action-by-action calling, messaging, Task, Event, Note, File, and RAIN guidance. Use Activity timeline filters and metrics when a row or summary is missing or unclear. Use List views, filters, and display to build the work population before opening a record.

Where to work

Start from the record that represents the current business context. Before conversion, that may be a Lead. For an active deal, it is usually the Opportunity or Property Transaction. A person relationship identifies the Lead or Contact involved; a business-record relationship identifies the deal, account, or property the activity concerns.

Before you begin

Confirm the recipient's identity, preferred channel, consent, suppression status, message purpose, and any timing restrictions. Calling, SMS, email, and scheduling may require separate authorization, sender setup, calendars, or provider availability. A visible option does not by itself confirm that a channel is ready.

Work through it

1. Open the current Lead, Contact, Opportunity, or Property Transaction.
2. Choose the appropriate activity: call, call log, SMS, email, Task, Event, note, or File.
3. Confirm the person relationship and the business-record relationship. A correct Contact attached to the wrong deal will make timelines and summaries misleading.
4. Enter the date and time, direction, subject, outcome, owner, and concise notes needed by the next user.
5. For a Task, set a realistic due date, status, priority, owner, and reminder. For an Event, confirm start and end times, attendees, location, availability, and reminder behavior.
6. For a message, verify the sender, recipient, approved content, and scheduled time. Review the final audience before any bulk send.
7. Save or send once and wait for the completion response.
8. Open the resulting activity and confirm its person, business record, owner, timestamp, and status.
9. Create the next follow-up immediately when the outcome requires one.

Use Chatter for internal collaboration when your organization has enabled it. A Chatter post is not an SMS or email to the customer and should not be used as proof that external outreach occurred. Post on the record that owns the discussion and confirm that everyone in the intended audience can access that record.

Confirm the result

A Task or Event appears in activity history with the intended owner, relationships, time, and status. Notes and Files are available from the intended record to the expected audience.

For SMS or email, a saved communication means 8020CRM accepted the request. Delivery is confirmed only when its available result reaches a delivered, failed, or other final state. Counts, last-activity dates, next-activity dates, and similar summaries may update later than the source activity.

If it does not look right

- If an activity appears on the wrong record, inspect both its person and business-record relationships before creating another activity.
- If a message is scheduled or pending, check its scheduled time and processing state. Do not resend while delivery is unresolved.
- If a message failed, correct the recipient, sender, consent, or available delivery issue, then retry only the failed recipient.
- Before recreating a Task or Event, search history and the calendar by person, owner, deal, and time.
- If the source activity is correct but a summary is stale, allow recalculation to finish. Changing a summary does not repair the underlying activity.
- If a Chatter post exists but no notification arrived, do not repost it. Confirm the recipient can see the post, then have an administrator review Salesforce's organization-level Chatter email settings, the user's personal notification settings, and verified sender configuration. See [Chatter Email Settings and Branding](#) 🌩 and [Troubleshooting Chatter Email Notifications](#) 🌩.
- If the issue is how Tasks, Events, or activity history appear, compare the source record with Salesforce's [Activities overview](#) 🌩 and [Activity Timeline guidance](#) 🌩.

Related guidance

Use Lead conversion and deal setup when activity should move to a new deal context. Use Transaction coordination for contract milestones and shared close work.

Activity Composer

Use the configurable 8020CRM Activity Composer to call, message, schedule, document, and verify follow-up from the correct record.

What the Activity Composer does

The 8020CRM Activity Composer keeps calls, messages, Tasks, Events, notes, Files, and assisted follow-up in the context of the record being worked. Its default visible actions are **Call**, **SMS**, **Email**, **Task**, **Event**, **Note**, **Log Call**, **Files**, and **RAIN**.

Those labels and controls are configurable. An administrator can hide or rename actions, choose a different default action, or replace Task, Event, or Log Call behavior with an approved guided process. Treat the actions visible on the active record page as the configured experience for your organization.

The screenshot displays the 8020CRM Activity Composer interface. The top navigation bar includes the 8020CRM logo, a search bar, and various menu items like Home, Tasks, Properties, Leads, Opportunities, Property Transactions, Contacts, Accounts, Campaigns, Calendar, RAIN, and More. Below the navigation bar is a breadcrumb trail showing the lead's lifecycle: New, Contacted, Working, Nurturing, and Converted. The main content area is divided into several sections:

- Lead Details:** Shows the lead's name (Clark Kent), email (demo@example.invalid), mobile phone ((555) 010-0100), and a photo placeholder.
- Property Details:** Displays the property address (123 Demo Street, Phoenix, AZ 85001) and various metrics like asking price (\$700,000), mortgage balance (\$426,896), and property score (92%).
- Lead Intake:** A section for recording lead information, including full name, email, mobile phone, and contact type (Seller).
- Activity Log:** A list of recent activities, including inbound SMS messages and chatter posts from demo users.

The interface is designed to be highly configurable, allowing users to tailor the view and actions to their specific workflow.

Activity Composer stays on the active record page so the user can confirm the Lead, Property, lifecycle, and recent history before acting. This demonstration page is configurable.

Before you begin

From the App Launcher, open **8020CRM**, then the supported object tab and the record that owns the current business context. Locate the **Activity Composer** panel on that record page and choose the action there. The separate **Activity** tab or timeline is primarily a history and review surface; do not assume it exposes the same Composer actions.

Confirm access to the record and permission to create the selected activity. For communication, also confirm the person's identity, channel consent, suppression status, timing restrictions, and the availability of an authorized sender.

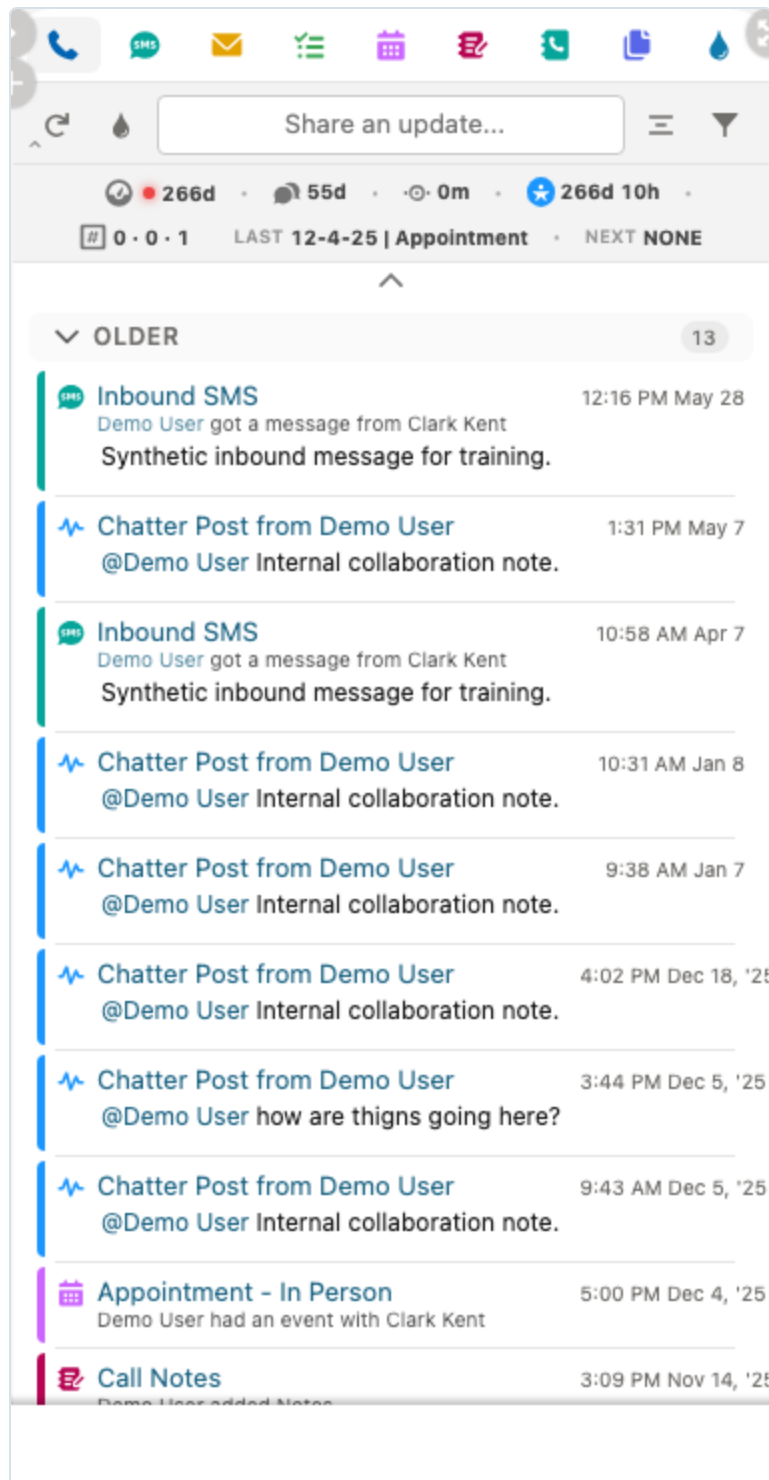
Salesforce owns the standard relationship and access behavior described in Guidelines for Tracking Activities . 8020CRM owns the configured composer experience and the product-specific communication routing around those Salesforce records.

Choose the right action

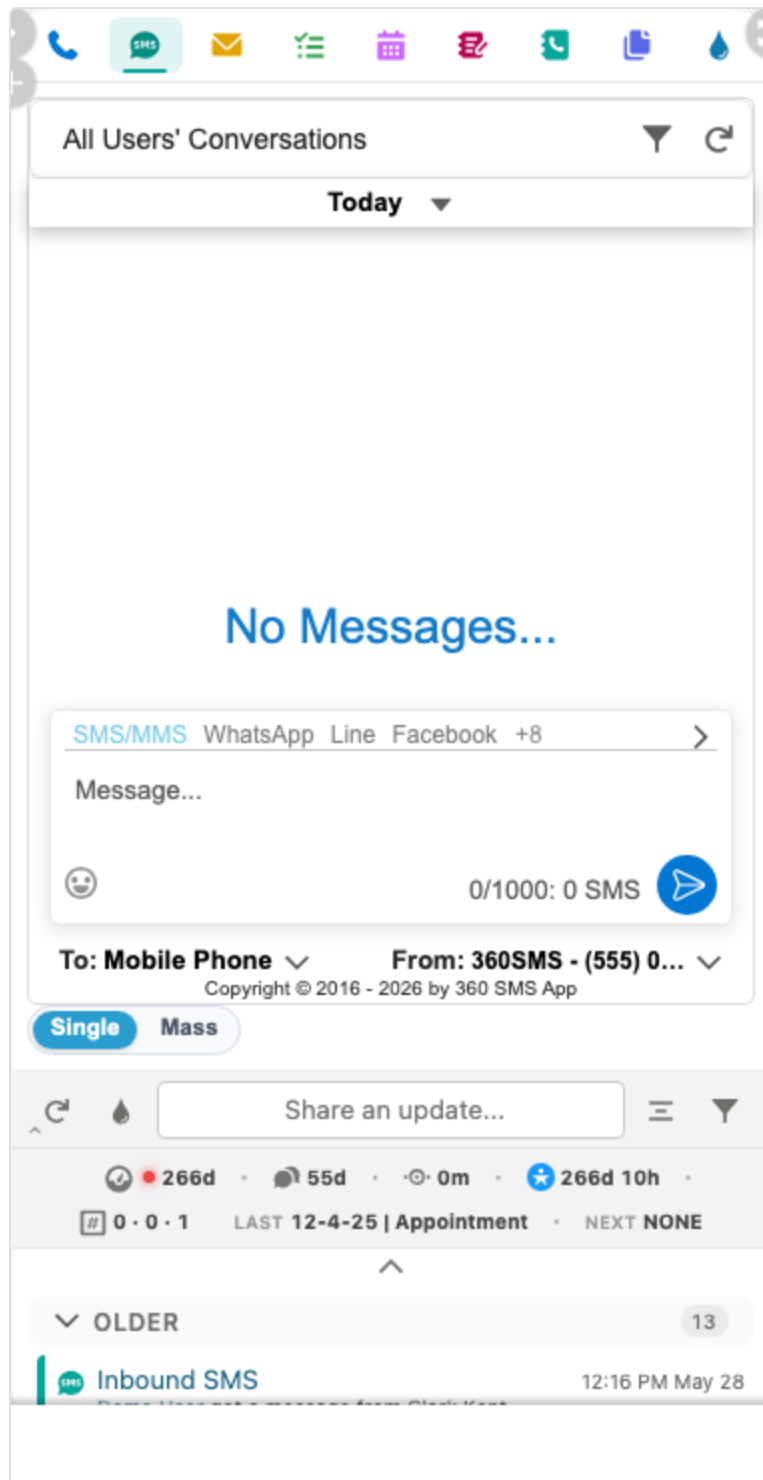
Action	Use it when
Call	Place a connected call from the current record
SMS or Email	Send an external message through an authorized sender
Task	Assign work with an owner, due date, priority, and status
Event	Schedule a time-bound appointment or meeting
Note	Preserve internal narrative that belongs with the record
Log Call	Record a call that already happened without placing another call
Files	Add supporting documents or media to the record
RAIN	Use an available assisted action; availability depends on configuration and readiness

Salesforce's Tasks guidance  explains the platform behavior of the Task records created and managed through 8020CRM.

Call and Log Call



Call uses the configured click-to-dial or phone integration. Confirm the From and recipient values before starting the call.



The configured SMS provider can expose additional channels and controls. Verify sender, recipient, mode, and message before submitting.

To
CC / BCC

★ Clark Kent (Lead) X

Subject

A[≡] ▾
A^I ▾
B
I
U
A ▾
A^A ▾
⋮

Kris Young
Admin
480788112

74 E Glenwood Ave #330 Smyrna, DE 19977

Single
Mass
Compose

🔴 266d
📧 55d
🕒 0m
★ 266d 10h

0 · 0 · 1
LAST 12-4-25 | Appointment
NEXT NONE

▽ OLDER
13

Inbound SMS
12:16 PM May 28
Demo User got a message from Clark Kent
Synthetic inbound message for training.

Chatter Post from Demo User
1:31 PM May 7

Open Compose only after checking the complete recipient list and whether the action is Single or Mass.

Task and Event

The screenshot displays a task management application interface. At the top, there is a navigation bar with icons for various functions: a phone, SMS, email, a checklist, a calendar, a document, a chat bubble, and a water drop. Below this, a form is used to create or edit a task. The form includes fields for 'Subject' (containing 'Follow Up'), 'Assigned To' (containing 'Demo User'), 'Purpose or Function' (containing 'Lead Management'), 'Due Date' (set to 'Jul 23, 2026'), 'Comments' (an empty text area), and 'Priority' (set to 'Normal'). 'Cancel' and 'Save' buttons are positioned at the bottom of the form. Below the form is a section for sharing updates, featuring a 'Share an update...' input field and a filter icon. A summary bar shows progress metrics: a red circle with '266d', a blue circle with '55d', a green circle with '0m', and a blue star with '266d 10h'. Below this, a status bar indicates '# 0 · 0 · 1', 'LAST 12-4-25 | Appointment', and 'NEXT NONE'. The main content area is titled 'OLDER' with a count of '13'. It lists four recent updates: two 'Inbound SMS' messages from 'Clark Kent' dated May 28 and Apr 7, and two 'Chatter Post from Demo User' dated May 7 and Jan 8. Each update includes a brief description of the message or post.

A Task represents owned work. Set a useful subject, accountable owner, realistic due date, purpose, and priority.

* **Subject**
 Appointment - In P

* **Assigned To**
 Demo User

Purpose or Function
 Lead Management

Location
 123 Demo Street, Quee

Start
 Date: Jul 21, Time: 2:00

End
 Date: Jul 21, Time: 3:00

Description
 Pro Tip: Description will sync to Google calendar invite when attendees exist.

* **Attendees**
 Search attendees
 Demo User
 Clark Kent

Cancel Save

Share an update...

266d 55d 0m 266d 10h

0 · 0 · 1 LAST 12-4-25 | Appointment · NEXT NONE

OLDER 13

Inbound SMS
 Demo User got a message from Clark Kent
 Synthetic inbound message for training.

An Event represents scheduled time. Confirm time zone, start and end, attendees, location, reminder, and related record.

Note, Files, and RAIN

Title

Enter Title...

B

I

U

S

Cancel

Save

Call Notes

Synthetic call note for training.

11/14/2025 03:09 PM by Demo User

Share an update...

266d

55d

0m

266d 10h

0 · 0 · 1 LAST 12-4-25 | Appointment NEXT NONE

OLDER

13

Inbound SMS

12:16 PM May 28

Demo User got a message from Clark Kent
Synthetic inbound message for training.

Chatter Post from Demo User

1:31 PM May 7

@Demo User Internal collaboration note.

Inbound SMS

10:58 AM Apr 7

Demo User got a message from Clark Kent

Notes are internal record context. They do not prove that a customer was contacted.



Thumbnail

0



 Upload Files

Or drop files

Photos & Videos

0

 Upload Files

Or drop files

 EXTERNAL LINKS

Save URLs

Photos URL

https://photos.example.c

Virtual Walkthrough URL

https://walkthrough.exan

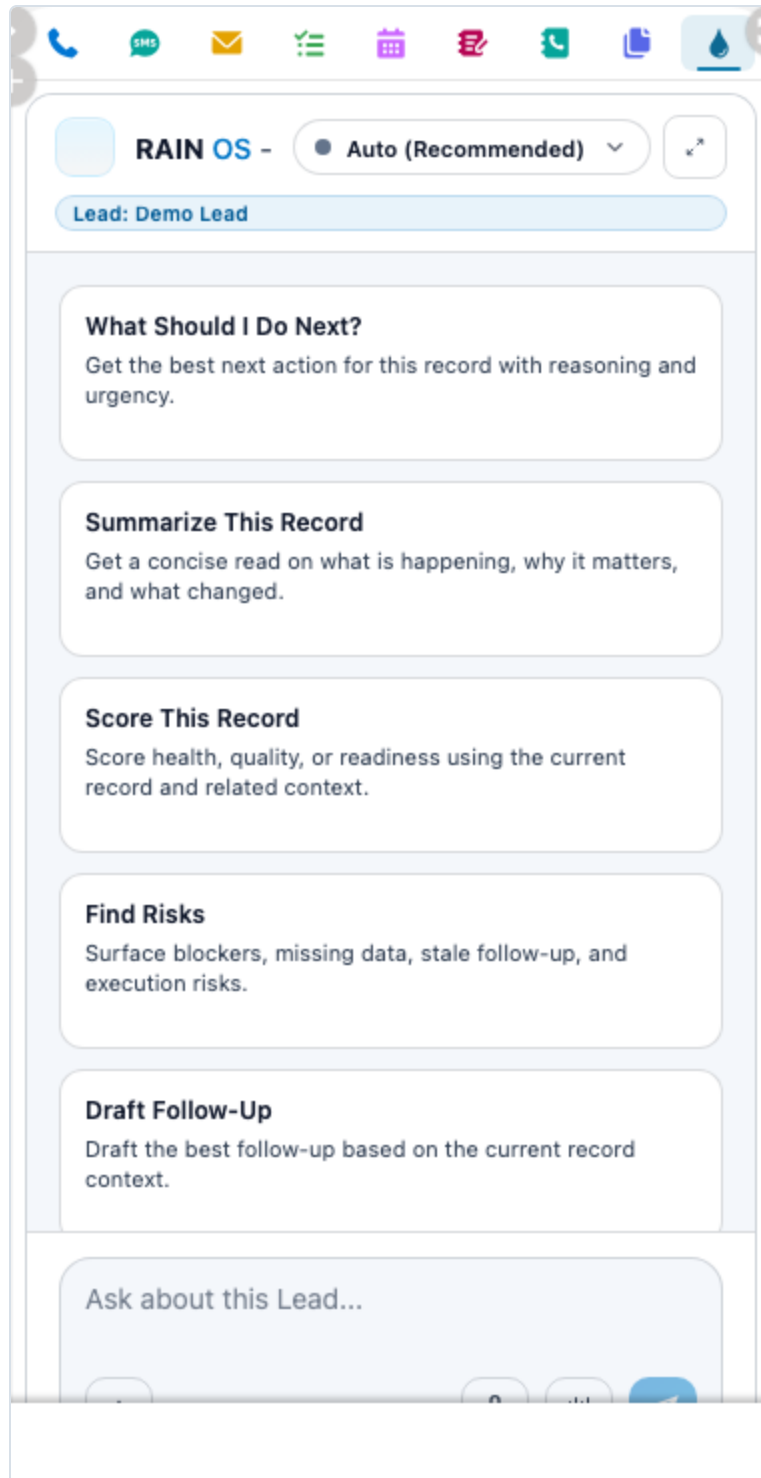
Contracts & Documents

0

 Upload Files

Or drop files

File categories and accepted content are configurable. Upload to the category and record that own the document's purpose.



RAIN is available only when connected and authorized. Review generated guidance against the current record before acting.

Send a single message, mass SMS, or mass email

Single mode creates one compose-and-send request centered on the current record. An email can still contain several To, CC, or BCC addresses, so Single does not remove the need to inspect every

recipient.

Mass mode prepares a mass SMS or mass email as personalized work for the selected audience. The Composer can resolve recipients from the current record, related records, an approved report or audience selection, depending on configuration. Confirm the final count, exclusions, sender, template, merged content, and schedule before submitting. Do not use mass mode when the message needs individual judgment or contains information that should not be exposed to every selected recipient.

A mass request can produce a different result for each recipient. Review per-recipient queued, sent, delivered, failed, bounced, or suppressed results where available; retry only the failed scope. Provider limits and Salesforce email limits still apply.

Work through it

1. Open the Lead, Contact, Account, Opportunity, Property, or Property Transaction that owns the work.
2. Select the configured action that matches the intended outcome.
3. Confirm the person and business-record relationships before entering content.
4. For SMS or email, verify the displayed sender and every recipient. Preview merged content and remove unintended addresses.
5. For a Task or Event, verify owner, date or time, subject, reminders, attendees, and related records.
6. Save or send once. Keep the action open until 8020CRM reports that the request was accepted or failed.
7. Open the resulting Task, Event, communication, note, or File and confirm its owner, relationships, timestamp, and current status.

Confirm the result

A saved Task or Event should open with the intended owner, person, business record, and date. A note or File should be visible from the intended record to the expected users.

For SMS or email, an accepted request means 8020CRM recorded or queued the work. It does not prove that a carrier, mailbox, or recipient delivered, opened, or acted on it. Wait for the available final delivery result before retrying.

If it does not look right

- If an action is missing or labeled differently, confirm the record page, form factor, permissions, feature readiness, and local App Builder configuration.
- If no sender is available, stop and ask an administrator to verify the user's authorized mailbox or phone assignment.
- If the recipient is wrong, cancel before sending and correct the source record or explicit recipient selection.
- If a request is pending, inspect its schedule and processing state. Do not submit it again while the outcome is unresolved.
- If a request failed, correct the stated sender, recipient, consent, content, or service issue and retry only the failed recipient.
- If an activity was created on the wrong record, correct its person and business-record relationships instead of creating an unexplained duplicate.
- If a sent or otherwise immutable communication is wrong, preserve the original delivery and activity history. Create the approved corrective communication, follow-up Task, or support case instead of rewriting the audit trail.

Administrators place and configure Activity Composer from a representative record by selecting the Setup gear, **Edit Page**, then the Activity Composer component in Lightning App Builder. Review its visible actions, labels, default action, component visibility, and any guided Task, Event, or Log Call behavior; then save, activate, and test the page as a representative user. Salesforce Lightning App Builder  guidance applies to page placement and activation, while 8020CRM owns the Composer behavior.

Best practices

Use Log Call only for calls that already occurred, use Tasks for owned work, and use Events for time commitments. Keep notes concise and business-relevant. For mass communication, use a narrow reviewed audience and retain the final per-recipient results rather than relying on the submit confirmation.

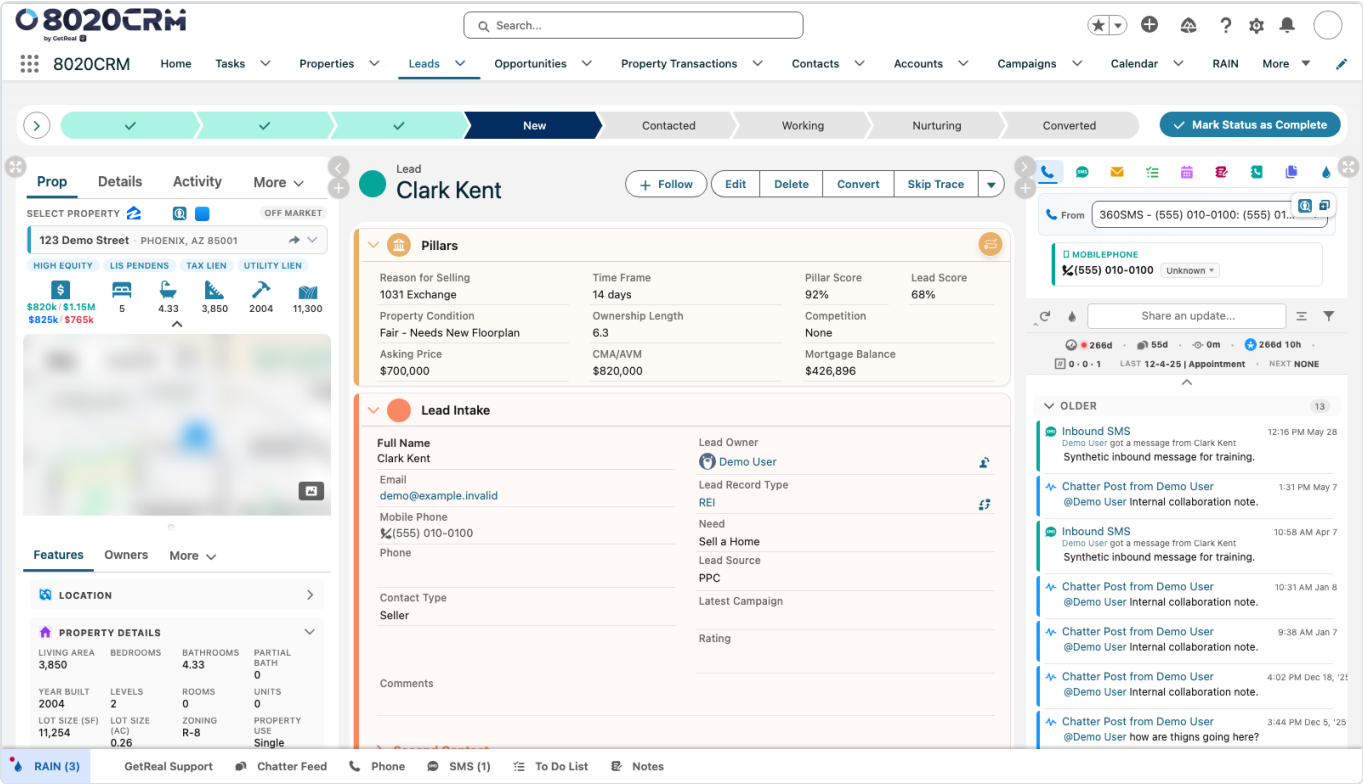
For additional product walkthroughs, see Using Activity Composer in 8020CRM , the Activity Composer and Timeline video , and The Power of Activity Composer . The configured page in your organization remains authoritative when an older video shows different labels or controls.

Activity timeline filters and metrics

Filter the 8020CRM activity timeline, load additional history, and interpret activity metrics without overstating what a visible summary proves.

What the timeline shows

The 8020CRM activity timeline combines available activity records for the current record and, where configured, a related deal context. Depending on the record and enabled features, rows can include Tasks, Events, calls, SMS, emails, list emails, communications, Files, notes, Chatter posts, campaign activity, and form submissions.



Read timeline rows and metrics in the context of the current record. The demonstration values are synthetic and the visible sources depend on configuration and access.

Salesforce's Activities View explains the platform distinction between an activity timeline and activity related lists. The 8020CRM timeline adds configured sources and filters, so it can differ from Salesforce's standard Activities component.

Before you begin

Confirm that you opened the intended record and can access the underlying activity. A timeline cannot show a row that the current user cannot access, that is related only to a different record, or that is outside the retrieved source limits.

Filter the timeline

Use the filter control to combine:

- **Date:** All Time, Upcoming & Overdue, Today, Yesterday, and Last 30 Days.
- **Owner:** All Activity, My Activity, or selected users.
- **Activity:** All Types or one or more types discovered in the retrieved timeline.

Upcoming & Overdue includes future items and open Tasks, including overdue Tasks. Date selections control which date sections are shown. Owner and activity-type selections narrow the rows before the visible page is built.

The screenshot displays a CRM interface. On the left, a lead profile card shows the following information:

Pillar Score	Lead Score
92%	68%
Competition	None
Mortgage Balance	\$426,896

Below the profile card, there are sections for 'User', 'Lead Type', and 'Campaign', each with a corresponding icon.

On the right, a communication history panel shows a message from '360SMS - (555) 010-0100: (555) 01...'. Below this, a 'MOBILEPHONE' section displays the number '(555) 010-0100' and a status of 'Unknown'.

The main activity timeline is visible below the communication history. A filter menu is open, showing the following categories and options:

- DATE**
 - All Time (checked)
 - Upcoming & Overdue
 - Today
 - Yesterday
 - Last 30 Days
- OWNER**
 - All Activity (checked)
 - My Activity
 - Specific Users
- ACTIVITY**
 - All Types (checked)
 - Chatter (9)
 - Event (1)

The timeline itself shows a list of activities, including 'Inbound Demo User Synthetic', 'Chatter @Demo', and 'Chatter Post from Demo User @Demo User how are thigns going here?'.

Filters change the visible working set; they do not change or delete the underlying activities.

Load additional activity

The timeline initially displays the first 20 matching retrieved rows. Scroll near the end of the activity list and use **Load More** to add the next 20. Continue until the needed period is visible or no more retrieved rows remain.

Loading more does not query an unlimited audit history. Each source can have its own retrieval boundary, and a row can be absent because of record relationships, access, configuration, or source limits.

Marketing journeys and form submissions

Form submissions and supported Campaign activity can appear as dated timeline rows. Open the row to inspect the saved source response, relationship, and timestamp.

Current Marketing Cloud journey membership is different. When configured, the separate **Marketing Journeys** panel lists journeys the person is currently in. Authorized users can request **Stop** or **Stop All Journeys**; that request can remain in progress. Stopping a journey prevents future journey communication for that membership but does not delete earlier emails, activities, Campaign evidence, or form submissions. A journey that is absent from the panel is not proof that no historical journey communication occurred.

Read the metrics strip

The strip can show record-specific measures such as speed to lead, last contact, status or stage age, record age, activity counts for 7 days, 30 days, and all time, plus the last and next activity.

Use these as operational pointers:

- Select **Last** or **Next** when available and inspect the underlying Task or Event.
- Read 7-day and 30-day counts as activity-volume context, not proof of outcome or quality.
- Read status or stage age against the current source record and its stage history.
- Treat a missing next activity as a prompt to inspect open Tasks and Events, not proof that no follow-up exists anywhere.

If stored metric fields are unavailable or appear inconsistent, the page can show fallback values calculated from the retrieved Task and Event rows. Those fallback values can be limited by retrieval boundaries and do not include every timeline source. **Do not use them as audited historical KPIs.**

Confirm the result

A filtered row should open the expected source record with the intended owner, type, date, and relationships. A Last or Next metric should open the Task or Event it summarizes. After loading more, the visible count should expand by up to 20 until the retrieved set is exhausted.

If it does not look right

- Clear date, owner, and type filters one at a time.
- Load more rows when the selected date section is older than the initial display.
- Check both the person and business-record relationships on the source activity.
- Confirm access to the source record and any related deal record.
- Refresh after creating, editing, completing, or deleting an activity; summary recalculation can follow the source save.
- If Last, Next, or a count is wrong, correct the underlying Task or Event. Do not edit a summary merely to make the strip look current.
- Use a report with a defined population, date field, and security context when an audited historical total is required.

Best practices

Use timeline filters to find operational evidence, then open the source row before acting. Use reports for governed historical measures. Salesforce owns its standard timeline display rules, including the considerations in Activity Timeline Customization Considerations ; 8020CRM owns the configured multi-source timeline, its filters, and its product metrics.

The 8020CRM Activity Composer article  and Activity Composer and Timeline video  provide additional product context. Use this current guide and the assigned record page when older media differs.

List views, filters, and display

Select, filter, sort, edit, and safely act on 8020CRM work lists using the Salesforce list-view modes available for each object.

What a list view controls

A list view is a saved population of records plus a column layout and sort. It helps users find work, but it does not grant access to records or make every visible field editable.

List-view names, visibility, filters, displayed columns, and column order can be customized. The 8020CRM navigation order can also be customized. Use the current object's list selector as the authority instead of relying on a fixed label or position from training.

Salesforce owns the standard controls described in Work with List Views in Lightning Experience ☁️. 8020CRM supplies configured business views and any product-specific actions available from them.

The screenshot displays the 8020CRM interface. At the top, there's a navigation bar with the 8020CRM logo, a search bar, and various icons. Below this is a secondary navigation bar with tabs for Home, Tasks, Properties, Leads (selected), Opportunities, Property Transactions, Contacts, Accounts, Campaigns, Calendar, RAIN, and More. The main content area is titled 'Leads' and shows a filter 'Unprocessed' with a dropdown arrow. Below the filter, it says '7 Items - Sorted by Name - 4 Filters Applied - Updated a few seconds ago'. There's a search bar for the list and a row of action buttons: New, Import, Add to Campaign, Send Email, and Change Status. Below these is a table with columns: Name, Need, Property Name, Mobile, Email, Le..., Owner Alias, Lead ..., Rating, Last Activity, Next Activity, and R... The table contains several rows of data, mostly blurred. At the bottom, there's a footer bar with a 'RAIN (3)' button and links to GetReal Support, Chatter Feed, Phone, SMS (1), To Do List, and Notes.

All row values are intentionally blurred. The visible list name, action bar, columns, sort, applied-filter count, and utility items show the working structure without exposing demonstration records.

Before you begin

Confirm the object, selected list name, record count, and whether the view is private or shared. You need read access to the object and records. Editing, saving public views, inline editing, and mass actions require additional permissions.

Work through a list

1. Open the correct object tab and select a list from the list selector.
2. Pin a frequently used list when it should open by default for you.
3. Open Filters and confirm the owner scope, status or stage, record type, date, and other business criteria.
4. Use **Save As** when experimenting with a shared list. Salesforce's Edit List View Filters  explains locked filters and filter permissions.
5. Sort by the columns that determine priority. Confirm sort direction before acting on the first rows.
6. Use **Select Fields to Display** to add, remove, and reorder columns when you can customize the view.
7. Refresh before comparing counts or running a mass action.

8020CRM

by GetReal

Search...

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8020CRMHomeTasksPropertiesLeadsOpportunitiesProperty TransactionsContactsAccountsCampaignsCalendarRAINMore

Leads

Unprocessed

NewImportAdd to CampaignSend EmailChange Status

7 Items • Sorted by Name • 4 Filters Applied • Updated a few seconds ago

Search this list...

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Property Name

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Filter by Owner

All leads

Matching these filters

1. GR Lead Status equals New

2. Lead Record Type equals REI

3. Unread equals True

4. Owner Alias contains Queue

Add FilterRemove All

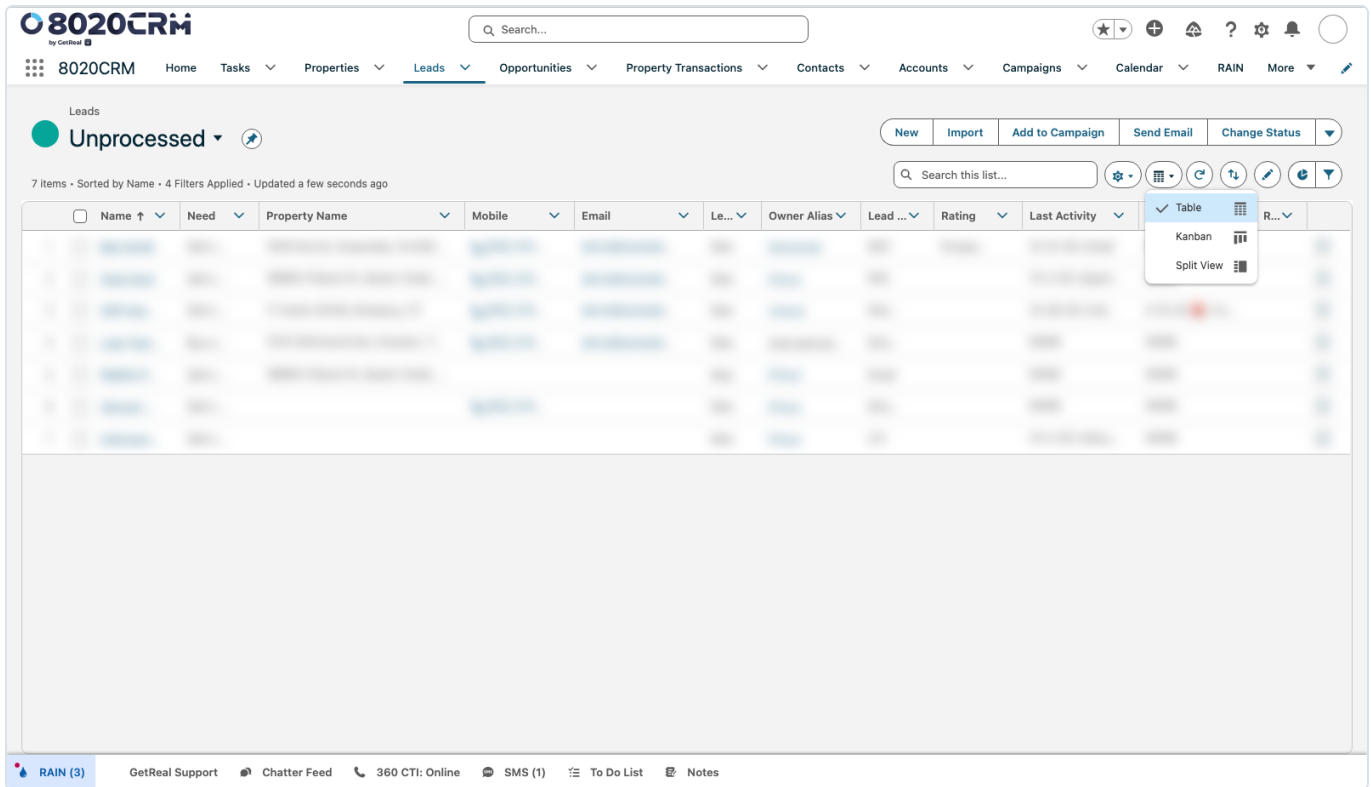
Filter Logic

(1 OR 3 OR 4) AND 2

RAIN (3)GetReal SupportChatter Feed360 CTI: OnlineSMS (1)To Do ListNotes

This example combines lifecycle, record type, unread, and queue-owner criteria with explicit filter logic. Shared list definitions can change, so inspect the panel rather than assuming a familiar label still selects the same records.

Choose a display mode



The Salesforce display selector is separate from the list selector. Changing display does not change the saved population.

Mode	Best use
Table	Scan and compare fields, sort, select rows, and inline edit supported cells
Kanban	Group supported records by a configured field and move work between columns
Split view	Keep a supported list visible while opening one record beside it, commonly in console work

Availability depends on the object, app, form factor, record types, permissions, and Salesforce support. Work in a Kanban View [explains](#) that dragging a card updates the grouped field; confirm the resulting record state and any automation before moving several cards.

Edit safely

A pencil indicates an inline-editable cell; a lock indicates that the field must be edited elsewhere. Inline editing can require the list to contain one record type, and it is not available in split view. Review Salesforce's inline-editing considerations [before](#) treating a missing pencil as a defect.

After inline editing, save and refresh. A changed record can remain visible until filters are reapplied.

Use mass actions safely

1. Narrow and refresh the list.
2. Prefer explicit row selection.
3. Read the confirmation text, object, mode, and record count.
4. Stop if the confirmation says the action targets all records in the current view when that is not intended.
5. Review dependent-record or irreversible effects shown by the action.
6. Submit once and retain the job or result state until completion.
7. Refresh the list and inspect representative records and failures.

Confirm the result

The selected list name, filters, sort indicators, columns, and row count should match the intended work population. After an edit or action, open a representative record and verify the authoritative field or related record, then refresh the list to confirm it still belongs in the view.

If it does not look right

- If a list is missing, search the selector and check list visibility and object access.
- If a label or column order differs from training, confirm whether the view was customized.
- If records are missing, inspect owner scope, filters, filter logic, record type, sharing, and field access.
- If filters are locked, clone or save as a permitted private view instead of changing a shared baseline.
- If Kanban or split view is missing, confirm object, app, device, and Salesforce support.
- If a mass action scope or count is unexpected, cancel and correct the list or selection before retrying.

Best practices

Give shared views durable business names, keep filters narrow, include the fields needed to make the decision, and avoid embedding a person's name in a team-wide view unless that owner scope is intentional. Use a report rather than a list view when a governed historical metric or grouped analysis is required.

Investment seller lifecycle

Move an investment seller opportunity from property intake and qualification through acquisition, disposition, closing, and final reconciliation.

What this helps you do

Manage an investment seller relationship from intake through acquisition and the chosen investment outcome. Acquisition means buying or securing control of the property. Disposition means the later sale, assignment, or other approved exit. This is different from representing a homeowner in a retail listing.



Keep acquisition and disposition Offers distinct, then reconcile both sides when the transaction reaches close.

Where to work

Use the Lead or Contact for identity, consent, and early communication; the Property for durable property facts; the Opportunity for the seller relationship and pipeline; the Property Transaction for property-specific operations and financial context; and a separate Offer for each material proposal.

Before you begin

Confirm the seller's identity and property relationship, the correct Property, owner, source, market, communication preferences, occupancy and access, condition, motivation, timing, and known financing or lien context. Leave unknowns incomplete rather than guessing.

Property data, comparable analysis, and optional RAIN Intelligence can support research. Treat estimates and suggestions as decision aids, not proof of seller intent, value, condition, or a completed professional review.

Work through it

1. Record intake against the correct seller and Property. If a search or enrichment request partly succeeds, identify which records already exist before retrying.
2. Qualify the seller and property based on actual engagement and available facts. Use nurture when timing is deferred but the relationship remains viable.
3. Once qualified, confirm the Opportunity and Property Transaction are connected to the same seller, Property, owner, and investment path.
4. Capture condition, valuation assumptions, intended strategy, responsible parties, title and lender context, inspection period, earnest money, target dates, contingencies, costs, and next action.
5. Create a separate Offer for each material acquisition proposal. Mark it sent or accepted only when that event has occurred through your organization's approved process.
6. At acceptance, compare the Offer, Opportunity, and Property Transaction for amount, parties, dates, financing, contingencies, title, and commissions. Assign deposits, inspections, documents, funding, and close work.
7. If the strategy includes a later sale or assignment, keep acquisition and disposition Offers distinct. Record each serious buyer proposal and retain unsuccessful proposals as history.
8. At close, record actual dates and amounts, final outcomes, parties, completed tasks, financial items, commissions, and attribution.

Confirm the result

The Opportunity shows the true seller outcome, while the Property Transaction shows the current operating stage and links to the correct Property and Offers. Current acquisition and disposition terms are not mixed. Closed work includes actual amounts and dates, final Offer statuses, and owners for any remaining administrative items.

Financial settlement, commission approval, document indexing, attribution, and reporting may finish after the commercial close. Assign these items without leaving the deal in an inaccurate stage.

If it does not look right

Verify the person, Property, Opportunity, and Property Transaction first. Identify the current Offer for the affected side, correct its status or relationship once, then wait for related updates before reviewing totals and reports. Preserve earlier Offers and failed contracts.

Do not recreate successful records or repeatedly change stages to force an update. That can duplicate Tasks, notices, financial items, or attribution. For a partial property request, resume only the missing step.

Related guidance

Use Offers, contracts, and closing for proposal controls and Transaction coordination for accepted-term execution.

Retail buyer lifecycle

Guide a represented home buyer from qualification and property search through offers, contract coordination, closing, and relationship follow-up.

What this helps you do

Guide a represented home buyer from qualification and search through offers, closing, and follow-up. The Opportunity represents the overall buyer relationship. Each Property Transaction represents work for one candidate property, allowing unsuccessful attempts to remain visible without replacing the buyer's history.



Preserve each property attempt separately so one buyer relationship retains the history of interest, offers, losses, and the eventual outcome.

Where to work

Use the Contact and Opportunity for the client's identity, search criteria, owner, stage, and next step. Use the Property for facts about a candidate home. Create a Property Transaction when a property requires durable showing, offer, due-diligence, or closing work. Use an Offer for each material proposal.

Before you begin

Confirm the client's communication preferences, agency relationship, target area, property type, budget, timing, must-have criteria, occupancy intent, financing method, lender or proof-of-funds status, and dependencies such as another sale or lease. Follow your organization's process for representation, disclosures, consent, and documents.

Search results, property data, and optional RAIN Intelligence are decision aids. Confirm current availability, condition, buyer priorities, financing, and professional evaluations through the normal process.

Work through it

1. Qualify the buyer's needs and readiness. Use Appointment or Scheduling for the initial consultation, Nurturing when timing is deferred, and Showings & Offers only when active property work begins.
2. Keep the Opportunity focused on the overall relationship rather than changing it to represent one address.
3. Create a Property Transaction when a candidate needs material due diligence, an Offer, or coordination. Connect the correct buyer Opportunity, Property, owner, and team.
4. For each serious proposal, create an Offer with the amount, financing, down payment, earnest money, inspection period, close date, expiration, contingencies, concessions, title and lender contacts, agents, and commissions.
5. Keep Offer statuses current and preserve rejected, withdrawn, cancelled, or replaced proposals as history.
6. When an Offer is accepted, confirm the accepted Offer and Property Transaction agree on the buyer, seller, Property, amount, financing, dates, contingencies, concessions, title, lender, and commissions.
7. Move to Under Agreement and Under Contract only when those business milestones occur. Assign deposits, inspections, financing, appraisal, title, documents, walkthrough, closing, and commission work.
8. Close or cancel abandoned property attempts while keeping their history. Keep only the intended contract active for closing.

Confirm the result

The Opportunity accurately shows the buyer relationship and stage. Each candidate Property has its own Property Transaction and Offer history. The accepted property is clearly active, abandoned

attempts have final outcomes, and close work has owners and dates.

Tentative or unsuccessful attempts may not affect Opportunity totals. Summary amounts and reports can also update after the source Offer or Property Transaction. At close, confirm the selected transaction and Opportunity are closed won, actual price and date are recorded, and commissions and required work are reconciled.

If it does not look right

Confirm the buyer Opportunity, candidate Property, Property Transaction, and current Offer in that order. Correct the Offer status or relationship once, wait for updates to finish, then review summaries. If a contract ends, close the failed Offer and transaction before returning the buyer to active search or nurture.

Do not copy one property's totals onto the Opportunity or repeatedly change stages. Before creating a replacement record, check all related attempts for the expected buyer, Property, owner, status, and date.

Related guidance

Use Offers, contracts, and closing for proposal changes and Transaction coordination after acceptance.

Retail seller lifecycle

Guide a represented home seller from intake and listing preparation through marketing, buyer offers, closing, and relationship follow-up.

What this helps you do

Manage a represented homeowner relationship from appointment and listing preparation through marketing, buyer offers, closing, and follow-up. This path is for a retail listing, not an investment acquisition and resale.



Read listing availability, offer progress, and contract status together; a failed deal should return the property to the correct selling state.

Where to work

Use the Contact and Opportunity for the seller relationship, owner, pipeline stage, and next step. Use the Property for address, condition, media, and valuation evidence. Use the Property Transaction for listing preparation, market status, parties, Offers, dates, and closing work. Each buyer proposal should have its own Offer history.

Listing status describes whether and how the home is available to the market. Opportunity and Property Transaction stages describe progress with the client and transaction. Keep both accurate.

Before you begin

Confirm seller identity, ownership and occupancy context, the correct Property, communication preferences, agency relationship, condition, pricing goals, timing, showing constraints, known financing or liens, target close, marketing approach, and commission terms. Follow your organization's approved agreement, disclosure, consent, and document process.

Comparable analysis and optional RAIN Intelligence can support pricing conversations. Treat estimates as decision aids rather than appraisals or sale-price guarantees.

Work through it

1. Use Appointment or Scheduling while arranging the consultation. Use Nurturing when the relationship remains valid but is not ready for active listing work.
2. Prepare the Property Transaction with the seller, Property, owner, team, pricing context, access, listing status, and next work.
3. Before launch, verify property facts, approved photos and Files, pricing, showing instructions, seller contacts, marketing plan, and material approved for external use.
4. Move to Listing & Marketing only when market preparation is active, and to Showings & Offers when buyer activity and proposals are active.
5. Record each material buyer proposal as a separate Offer. Include parties, amount, financing, earnest money, inspection period, expiration, contingencies, concessions, title and lender contacts, close date, agents, and commissions.
6. Keep unsuccessful or replaced Offers with accurate final statuses rather than overwriting them.
7. When the seller selects an Offer, verify it is the intended proposal and compare its terms with the Property Transaction and Opportunity.
8. Move to Under Agreement and Under Contract only when those events occur. Assign deposits, inspections, financing, appraisal, title, documents, contingencies, walkthrough, settlement, and commission work.

Confirm the result

The listing status matches market availability, while the Opportunity and Property Transaction reflect actual business progress. The selected Offer is clear, current terms agree, and contract tasks have owners and dates.

At a successful close, the Opportunity and Property Transaction are closed won, the selected Offer is closed, the listing reflects the completed sale, and actual price and close date are recorded. Financial settlement, commission approval, delayed documents, attribution, and follow-up may finish later; assign them without leaving the commercial stage inaccurate.

If it does not look right

If a buyer contract ends, give the failed Offer a final status, update the Property Transaction and listing status, then return the Opportunity to the appropriate active or nurture stage. Preserve the prior contract.

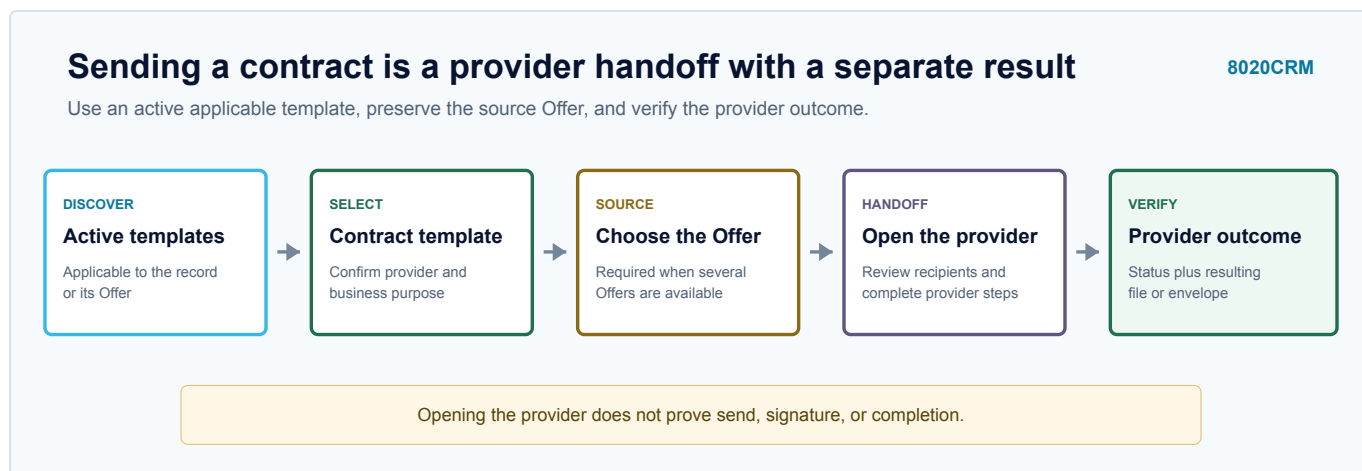
For mismatched terms or stages, confirm the Opportunity and Property Transaction relationship and identify the selected Offer. Correct the source event once, wait for related updates, then reconcile documents and totals. Do not repeatedly change listing or lifecycle stages, and do not create a second listing solely to reopen marketing.

Related guidance

Use Offers, contracts, and closing for Offer history and replacement. Use Transaction coordination for accepted-contract work.

Offers, contracts, and closing

Manage proposed terms, accepted-contract milestones, replacements, cancellations, and closing handoffs across every property lifecycle.



A generated contract is not the endpoint; verify the active template, recipient, terms, and provider outcome.

What this helps you do

Preserve each material proposal, identify the accepted terms, and hand an active contract into coordinated closing work. An Offer records one proposed set of terms. The Opportunity summarizes the client pipeline, while the Property Transaction organizes work for the specific property.

8020CRM records the business status selected by your team. Follow your organization's approved legal, document, review, and authorization process when deciding whether an agreement is effective or an obligation is complete.

Where to work

Before creating an Offer, confirm the Opportunity, Property Transaction, Property, parties, owner, and direction. Direction explains who is proposing to acquire the property: the investing business, an investment buyer, a represented retail buyer, or a buyer making a proposal on a retail listing.

Before you begin

Gather the amount, parties and entities, financing, down payment, earnest money, inspection period, target close, expiration, contingencies, concessions, costs, disclosures, title and lender contacts, agents, commissions, and approved documents. Required information can vary by transaction type and your organization's process.

To use **Send Contracts**, your organization must have an active DocuSign or Dropbox Sign configuration, applicable active templates, and provider access for the user completing the handoff.

Send contracts from an Offer

1. Open the intended record or Offer and select **Send Contracts**.
2. Review the active DocuSign and Dropbox Sign templates that are applicable to the current record or its Offer context.
3. Select the contract template approved for this proposal and business purpose.
4. When several Offers are available, select the source Offer whose terms and parties should supply the provider experience.
5. Select **Send** to open the provider experience. Recheck the source Offer, template, documents, recipients, and signing roles there, then complete only the authorized provider steps.
6. Return to the transaction and verify the provider status and the resulting file or envelope before updating the Offer or contract milestone.

Opening the provider is a handoff, not proof that the contract was sent, delivered, signed, or completed. Use the provider's status and the resulting file or envelope as the evidence for those later outcomes.

Work through it

1. Create an Offer when the proposal is important enough to preserve its terms and outcome.
2. Confirm it is attached to the intended Property Transaction and represents the correct side of the deal.
3. Keep incomplete terms in a draft or working state. Mark sent only after delivery through the approved channel.
4. Mark accepted only after acceptance is confirmed and the accepted version can be identified.

5. At acceptance, compare the Offer, Property Transaction, and Opportunity for parties, amount, financing, earnest money, concessions, costs, commissions, dates, Property, access, documents, and known exceptions.
6. Assign coordination ownership and work for deposits, inspections, title, financing, appraisal, contingencies, documents, utilities, walkthrough, settlement, and communication.
7. For a counter or replacement, preserve the prior proposal and its outcome. Confirm only the intended current Offer supplies current terms for that transaction side.
8. If a contract ends, update the Offer outcome first, then the Property Transaction, listing status when applicable, Opportunity stage, and remaining Tasks.
9. Before close, compare accepted terms with approved settlement information and record actual amount, date, final costs, concessions, parties, documents, and commissions.

Confirm the result

The selected Offer has the correct relationship, direction, status, milestones, and terms. The Property Transaction and Opportunity show the same current business outcome without erasing prior proposals. Acceptance has owners and dates for remaining contract work.

The Offer process is complete when the selected Offer has a final status, the Property Transaction and Opportunity have the correct outcome, and financial and coordination work has been handed to named owners. Invoices, commission approval, document indexing, settlement, and reporting may finish later.

If it does not look right

Identify the lifecycle, transaction side, current Offer, and most recent valid business event. Correct the Offer's relationship or status once, save, refresh, and allow delayed updates to finish before editing mirrored terms.

If no Offer appears, confirm the Property Transaction, Opportunity, direction, amount, milestone information, commission context, and access before retrying. Do not overwrite an unsuccessful Offer or repeatedly change stages to force agreement; those actions can duplicate Tasks, notices, financial updates, or attribution.

Related guidance

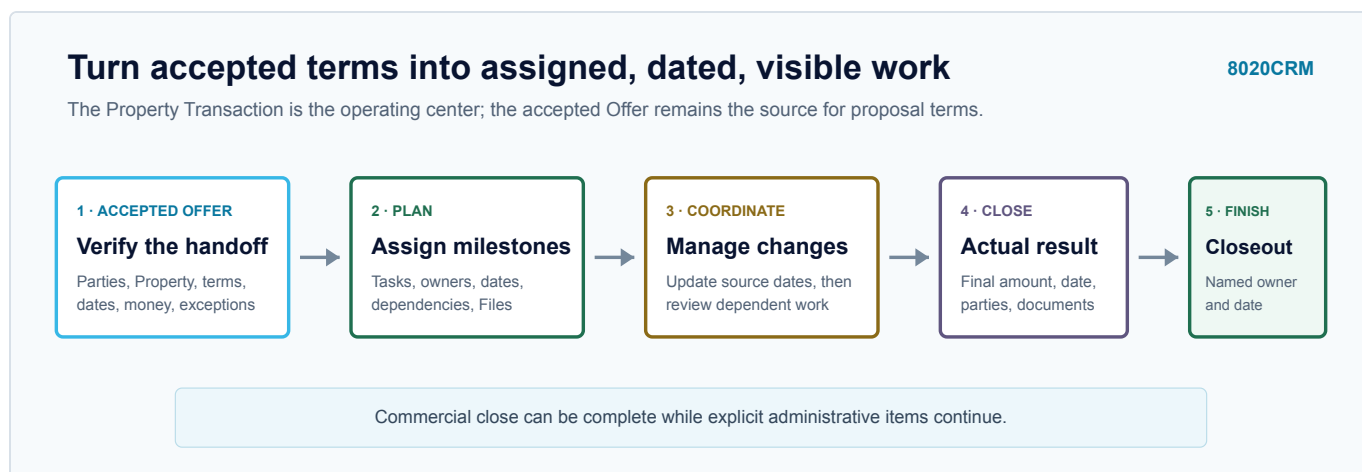
Use the relevant investment seller, retail buyer, or retail seller lifecycle for path-specific decisions.
Continue with Transaction coordination after acceptance.

Transaction coordination

Coordinate parties, dates, documents, tasks, access, exceptions, and closeout from accepted terms through final operational completion.

What this helps you do

Turn accepted terms into assigned, dated, and visible work. In 8020CRM, the Property Transaction is the operating center for the Property, Opportunity, current Offer, parties, team, activities, Files, milestones, financial details, commissions, and final outcome.



Coordinate from the accepted Offer forward, using milestones and source records to distinguish operational completion from administrative closeout.

Where to work

Coordinate from the Property Transaction. Use the accepted Offer as the source for proposal terms, the Opportunity as the client pipeline summary, and Tasks or an approved Action Plan for assigned work. A reminder or completed Task supports the process but does not prove that an external obligation was completed.

Before you begin

Confirm the transaction type, Opportunity, Property, current accepted Offer, owner, coordinator, primary parties, and enough accepted terms to create a milestone plan. The handoff should include parties, approved documents, amounts, financing, earnest money, concessions, commissions, costs, key dates, access, occupancy, possession, utilities, and known exceptions.

Assign the responsible team and verify each person can access the records, Contacts, Tasks, and Files needed for their role. Keep financial and commission access limited to the appropriate users.

Work through it

1. Compare the accepted Offer with the Property Transaction and Opportunity. Resolve differences in parties, terms, dates, or Property before building the plan.
2. Start the organization's approved Action Plan or checklist. Confirm its anchor date, task owners, dependencies, and due dates; remove irrelevant work and add deal-specific exceptions.
3. Track contract intake, signatures or approvals, special terms, earnest money, financing, appraisal, inspections, repairs, contingencies, title, settlement, access, utilities, walkthrough, and close appointment as applicable.
4. Keep every Task's owner, due date, and status current. Record material decisions and approved Files in the shared transaction context.
5. When a milestone changes, update the authoritative date and review dependent work instead of shifting every date without review.
6. For an investment transaction, keep acquisition and disposition parties, Offers, dates, and amounts distinct. For a retail buyer, coordinate only the active accepted property. For a retail seller, keep listing status aligned with the actual market state.
7. At close, compare accepted terms with actual results. Confirm amount, close date, parties, documents, costs, concessions, commissions, and final outcomes.
8. Complete or intentionally cancel remaining Tasks. Give any post-close invoice, commission, document, possession, attribution, or follow-up item a named owner and date.

Confirm the result

The current Offer has the appropriate final status; the Opportunity and Property Transaction show the correct outcome; actual amount and close date are recorded; parties and team are current; required Tasks are complete or intentionally cancelled; and approved documents are linked.

Commercial close can be immediate while administrative closeout continues. Final invoices, commission approval, settlement, document indexing, post-possession work, attribution, and client

follow-up may update later. Track them explicitly without keeping the commercial stage inaccurate.

If it does not look right

For a terminated contract, update the Offer first, then the Property Transaction, listing status when relevant, Opportunity, and task plan. Preserve completed history and cancel only work that no longer applies.

If records disagree, confirm their relationships and current Offer, then allow delayed updates to finish. Do not repeatedly change stages or generate a second plan to force progress. If a File seems missing, check related records before uploading another copy. If a teammate lacks access, correct access rather than duplicating information or changing ownership as a workaround.

Related guidance

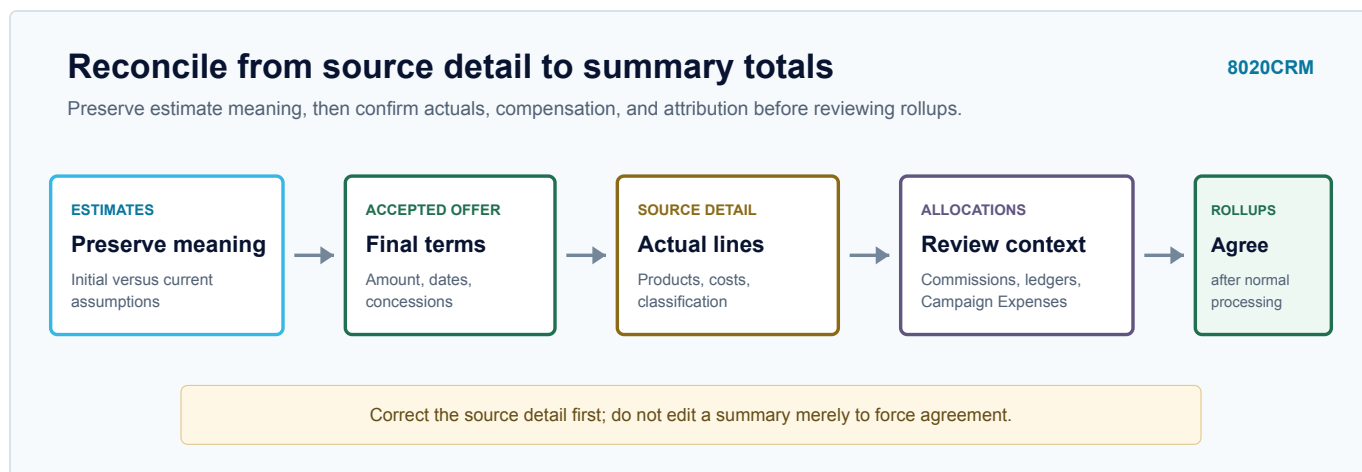
Use Offers, contracts, and closing for accepted-term and fallout controls. Refer to the applicable investment seller, retail buyer, or retail seller lifecycle for path-specific outcomes.

Financials, commissions, and attribution

Maintain estimated and actual deal economics, compensation allocations, marketing attribution, and final reconciliation across property lifecycles.

What this helps you do

Use this workflow to keep deal estimates, actual results, compensation, and marketing attribution aligned. Summary values on an Opportunity or Property Transaction are useful for daily work, but the supporting Offer, financial lines, commission or ledger entries, Campaign relationships, and Expenses provide the detail needed for reconciliation.



Trace every summary amount through accepted terms, source detail, and allocations before relying on a rollup.

Where to work

Begin with the Property Transaction and its related Opportunity. The packaged Opportunity and Property Transaction pages can expose a **Financials** tab. Property Transaction actions can also expose **Products/Costs** for managing detailed lines. Open the current accepted Offer for final terms, then review the related financial, compensation, and Campaign records used by your organization.

Before you begin

Confirm the correct Property Transaction, Opportunity, lifecycle, owner, and accepted Offer. Make sure approved financial templates, products, commission arrangements, and Campaign conventions are available to your role. Know whether a value is an initial estimate, current estimate, contract amount, or actual result before changing it.

Work through it

1. Review proposed revenue, acquisition or sale amount, preparation, holding, financing, closing, concession, referral, and commission assumptions that apply to the deal.
2. Check whether 8020CRM is expected to create financial lines from an approved template. Configure one owner for generated Opportunity or Property Transaction financial lines. Avoid adding a manual duplicate simply because a generated line has not appeared yet.
3. In Products/Costs, select the intended product or cost, enter an amount, and use a quantity greater than zero. Save and confirm the retained line and updated totals.
4. Preserve the initial estimate when your process reaches its approval or underwriting milestone. Continue to maintain current estimates separately so variance remains visible.
5. At close, compare the accepted Offer and approved settlement information with each financial line. Confirm its amount, classification, Property Transaction, and estimated or actual state.
6. Review commission recipients, roles, basis, amount or percentage, and transaction side. If your organization uses ledgers, confirm the related allocations and approval state.
7. Review Campaign relationships and campaign-backed Expenses. Confirm the person, deal, qualifying dates, and spend are related correctly before interpreting attribution.
8. Allow expected rollups or reconciliation to finish, then compare the detail with Opportunity, Property Transaction, and reporting totals.

Confirm the result

Closeout is complete when accepted terms match actual amounts and dates, financial lines are correctly classified, and estimates remain understandable. Commission or ledger items should be approved or assigned for later review. Campaign relationships and Expenses should be current, and summary totals should agree after the normal processing interval.

If it does not look right

Type of issue	Check first
Access or configuration	Your financial access, active products or templates, commission setup, and the organization's selected process
Record context	The accepted Offer, Property Transaction relationship, line classification, Campaign relationship, and qualifying dates
Delayed processing	Whether rollups or reconciliation are still completing before editing totals or retrying
Connected service state	Whether Campaign or expense information completed externally but has not yet reconciled in 8020CRM
Possible defect	A repeatable mismatch after access, configuration, source records, and expected processing have all been confirmed

The Products/Costs workspace requires a valid Price Book and eligible products. A missing modal, empty product selection, zero quantity, or blank amount should be corrected before save. A successful message should be followed by checking the durable lines and summary totals.

Before retrying, refresh and look for existing lines, commissions, statistics, or updated totals. Correct the source detail first; do not create a duplicate record or edit a summary merely to force the expected number.

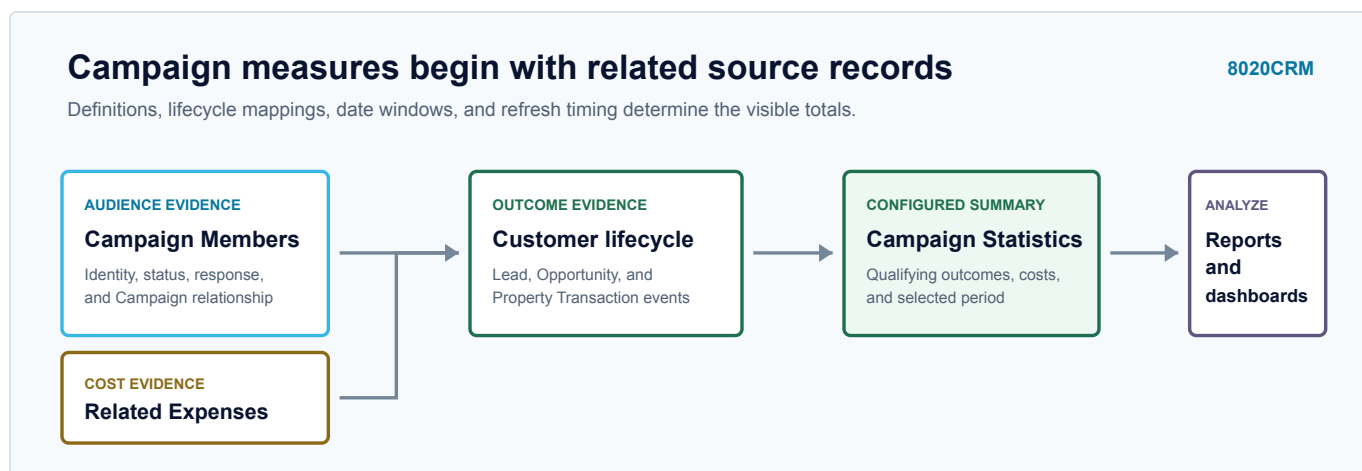
Related guidance

See Reports, dashboards, and operational health to interpret the resulting metrics and Troubleshooting and safe recovery for a broader recovery sequence.

Expenses, Campaign Statistics, and marketing performance

Record marketing costs, understand Campaign Statistics, and reconcile calculated outcomes to Campaigns, people, deals, and transactions.

Use Campaign expenses, statistics, and influence for the complete expense-entry, verification, Campaign Statistics, and Salesforce Campaign Influence procedure. This article summarizes the operating and reconciliation model without duplicating those steps.



Interpret Campaign Statistics as governed summaries of member, expense, and lifecycle evidence, then reconcile them with source records.

Record Expenses consistently

Use **Add Expense** from the Campaign when available to preserve an actual cost, date, vendor or payee, and Campaign relationship. The action prefills Campaign context; Amount and Date are required. Define whether internal labor, platform subscriptions, media spend, list purchases, creative, postage, events, and other costs are included before comparing campaigns.

1. From the App Launcher, open **8020CRM**, then **Campaigns** and the intended Campaign. Confirm its reporting period and owner.
2. Select **Add Expense**. The delivered action relates the new Expense to the current Campaign.

3. Enter the actual amount and date, plus vendor or payee, category, subcategory, and memo when applicable.
4. Avoid combining unrelated periods or campaigns merely for convenience.
5. Save once, open the created Expense, then verify it under **Campaign > Related > Expenses** and in the intended reporting population.

Editing the Campaign, amount, date, or vendor/payee can request a statistics recalculation.

Deleting an Expense can also require recalculation.

Understand Campaign Statistics

Campaign Statistics summarize configured marketing outcomes such as leads, qualification, opportunities, contracts, dispositions or closings, and related cost measures. The exact metrics depend on installed fields, lifecycle mappings, date windows, and the selected automation owner.

Statistics can respond to Lead and Opportunity relationships, conversion, Property Transaction outcomes, Expenses, and configured reconciliation. The inspected Expense synchronization runs during save, while other source paths and report or dashboard refreshes can have different timing.

IMPORTANT

Configure one intended owner for Campaign Statistics. Competing Flow and Apex ownership can produce repeated work or inconsistent timing.

Reconcile a marketing measure

1. Identify the metric definition, source records, qualifying status or stage, and date field.
2. Open the Campaign and representative Campaign Members, Leads, Opportunities, and Property Transactions.
3. Confirm the Campaign relationship was present during the qualifying event.
4. Confirm Expenses use the intended Campaign and reporting period.
5. Refresh **Campaign > Related > Campaign Statistics** and the applicable Marketing report.
Refresh the dashboard separately when used.
6. Compare detail rows before comparing formulas or dashboard totals.

Common reasons totals differ

Difference	Likely checks
Expense total is low	Missing Campaign relationship, wrong date, excluded category, access, or deleted record
Lead or opportunity count is low	Missing source Campaign, Campaign Member, conversion influence, date window, or qualifying lifecycle value
Closing outcome is absent	Property Transaction relationship, final stage or disposition, actual close date, and delayed reconciliation
Cost metric is unexpectedly high	Duplicate Expense, smaller qualifying population, period mismatch, or parent/child row duplication
Dashboard is stale	Dashboard refresh time, running context, source report filters, and Campaign Statistic source rows

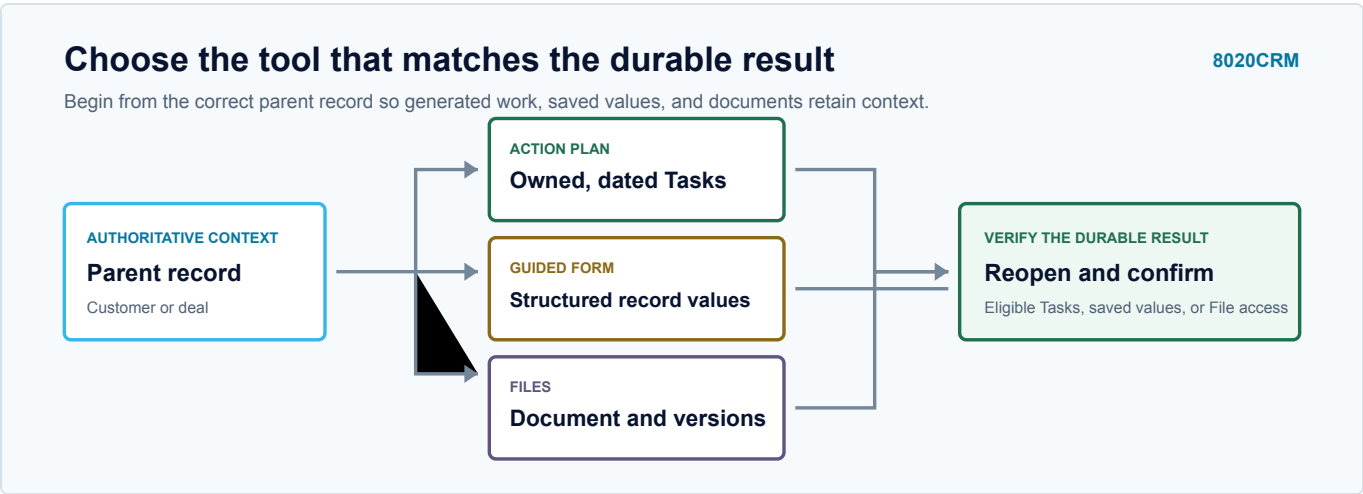
Correct the source relationship, date, status, or amount. Do not create a duplicate Expense or manually alter a lifecycle outcome to force a statistic.

Choose the right guided work tool

Choose the appropriate Action Plan, guided form, calculator, or File workflow, then continue into a focused 8020CRM guide.

What this helps you do

Action Plans, guided forms, and Files help teams complete repeatable work consistently. An Action Plan creates owned Tasks from an approved template. A guided form helps you update the correct business record. A File preserves supporting material with the record where colleagues need it.



Work to complete	Focused guide
Clone/reorder a form or assign its Lightning page	Administer guided forms and Lightning pages
Upload, version, share, or remove a record document	Files and record documents

Where to work

Start from the Lead, Contact, Account, Opportunity, Property Transaction, or other business record for the job. Keeping the parent record in view helps prevent a plan, form response, or File from being related to the wrong customer or deal.

Before you begin

Confirm the record type, owner, and current lifecycle state. For an Action Plan, select a template intended for that kind of record and confirm the proposed start date. For a form, verify that the displayed record and purpose match your work. Before uploading a File, confirm the approved audience, format, size, and handling requirements.

Work through it

1. Start the Action Plan once from the correct parent record. Select the applicable template and review any available date, description, or owner inputs.
2. Open the created plan and review the Tasks currently available. Confirm each Task's subject, owner, due date, priority, reminder, and related business record.
3. Complete work from the Task. Closing a prerequisite may release a later Task, so refresh the plan before concluding that a dependent step is missing.
4. Open a guided form from the intended business record. Work through visible sections in order and complete all required values.
5. Recheck fields when a controlling answer changes. Sections or requirements may change to match the record's current context.
6. Review defaulted and calculated values, then save once. Reopen the business record to confirm the intended values were retained.
7. Upload supporting Files from the relevant record or form area. Confirm the title, category when used, related record, version, and audience. Add a new version when revising the same

document instead of creating indistinguishable copies.

Confirm the result

An Action Plan is ready when its currently eligible Tasks have the expected owners and dates. A step is complete when its Task is closed and any dependent work appears as expected. A form is complete when the business record shows the saved values. A File is complete when it opens from the intended record for an authorized colleague.

Some follow-on Tasks, guided processes, exports, and large File operations can finish after the first action returns. Their durable records, not the completion message alone, prove the result.

If it does not look right

Type of issue	Check first
Access or configuration	Template availability, record type, owner rules, form availability, field access, and File sharing
Record context	Parent record, current values, prerequisites, related record, and intended audience
Delayed processing	Newly released Tasks, follow-on records, exports, or File previews still completing
Connected service state	Any guided step that submitted work outside 8020CRM but has not yet returned a result
Possible defect	The same failure on comparable records after permissions, setup, context, and timing are confirmed

Before retrying, look for an existing plan, Task, saved field value, related result, File, or File version. Retry only the incomplete step; creating another plan or uploading again can create duplicates.

Related guidance

See AI assistance, suggestions, and automation for recommendations layered onto structured work and Troubleshooting and safe recovery for recovery checks.

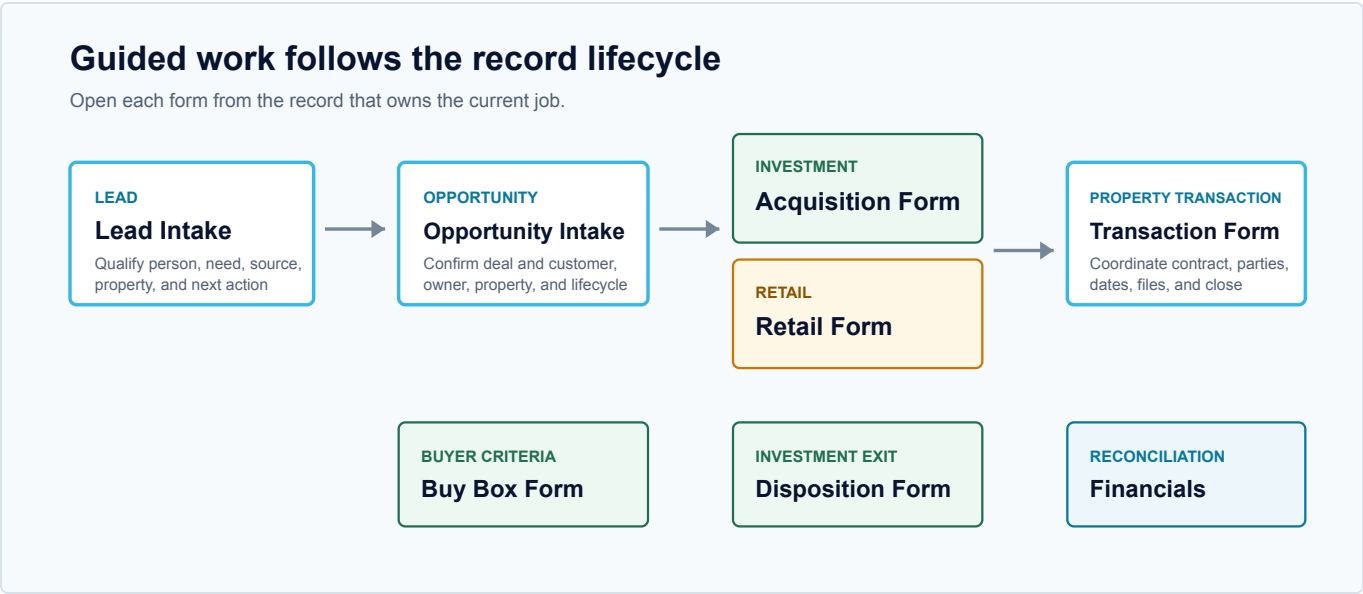
Guided forms by lifecycle

Choose and complete the Lead Intake, Opportunity Intake, Acquisition, Disposition, Retail, and Transaction forms from the record that owns the work.

Before you begin

You need access to the authoritative Lead, Opportunity, or Property Transaction; its active Property and related records; the lifecycle tab; and every field or action required by the selected form. Confirm the record type, stage, owner, active Property, and intended business result before opening a form. Form administration requires separate access and is covered in Administer guided forms and Lightning pages.

Choose the form that matches the job



Use the map to open the form tied to the current record and lifecycle stage rather than treating forms as interchangeable.

Form	Where users normally find it	Primary outcome
Lead Intake Form	8020CRM > Leads > [Lead] > Lead Intake	Qualify early interest, contact context, need, source, property, motivation, condition, occupancy, financial, and follow-up information
Opportunity Intake Form	8020CRM > Opportunities > [Opportunity] > Lead	Carry qualification into the active deal and confirm customer, property, ownership, stage, and deal context
Acquisition Form	8020CRM > Opportunities > [Opportunity] > Acq	Evaluate an investment acquisition, including seller/property context, valuation, offer, terms, and acquisition milestones
Disposition Form	8020CRM > Property Transactions > [Transaction] > Dispo	Prepare and manage buyer-facing disposition, pricing, marketing, offers, and disposition milestones
Retail Form	Eligible Opportunity or Property Transaction under Buy/Sell	Manage retail buyer or seller needs, representation, property, listing, offer, contract, and closing context
Transaction Form	8020CRM > Property Transactions > [Transaction] > TC	Coordinate contract-to-close dates, parties, documents, conditions, responsibilities, and closing readiness

Form availability can depend on record type, lifecycle, custom permission, page assignment, and device. The packaged Lead Intake placement is desktop-oriented. A missing form is often a visibility or configuration issue rather than missing data.

Complete any guided form

1. Open the authoritative Lead, Opportunity, or Property Transaction and confirm its name, owner, record type, stage, and active Property.
2. Open the lifecycle tab that matches the job.
3. Review the existing values before entering new information. Defaults accelerate entry but are not proof that a value is correct.
4. Complete visible sections in order. A section or field can appear, disappear, or become required when a controlling answer changes.
5. Use lookups to relate existing people, properties, offers, or other records instead of recreating them.

6. Review calculated values and any proposed dates, amounts, or terms.
7. Save once and wait for the form to refresh.
8. Reopen the business record and related records to confirm what was retained and what follow-on work was created.
9. Create or confirm the next Task, Event, Action Plan, offer step, or transaction milestone.

Lead and Opportunity intake

Use Lead Intake while the relationship is still being qualified. Confirm identity, communication information, source and Campaign, market, active Property, need, status, rating, consent, and next action. Configured requirements include Need, Lead Source, Contact Type, and Record Type; conditional sections can introduce more requirements. Use Opportunity Intake after a deal exists to confirm the commercial and operational context. Do not maintain conflicting qualification facts on both records after conversion; use the current deal records and supported synchronization.

Acquisition and Disposition

The Acquisition Form supports the seller-to-contract side of an investment deal. Work from the Opportunity and verify the linked Property and Property Transaction before relying on valuation, offer, or financial summaries. Primary Contact, Opportunity Owner, and the acquisition Offer Amount are important configured requirements. Creating the acquisition Offer relates it to the Opportunity and selected Property Transaction; verify both relationships after save.

The Disposition Form supports preparing and selling or assigning the acquired deal. Work from the Property Transaction and verify pricing, buyer-facing facts, portal and photo readiness, buyer prospects, offers, accepted outcome, and disposition milestones. A disposition Offer requires its amount; confirm the newly created Offer has the correct direction and relationships.

Retail and Transaction Coordination

The Retail Form changes meaning with the record type and side. Confirm whether the record represents a buyer or seller before completing property, representation, listing, offer, and closing information. Owner and Offer Amount are configured requirements for relevant work.

The **TC** tab requires transaction-user access. Investment records use the Transaction Form; eligible retail records use the Retail Form in transaction-coordination mode. Keep proposal terms on the accepted Offer, supporting documents in Files, activities in Tasks and Events, and operational

milestones on the Property Transaction. Cancellation choices and Offer amounts can introduce conditional requirements.

Troubleshooting a form

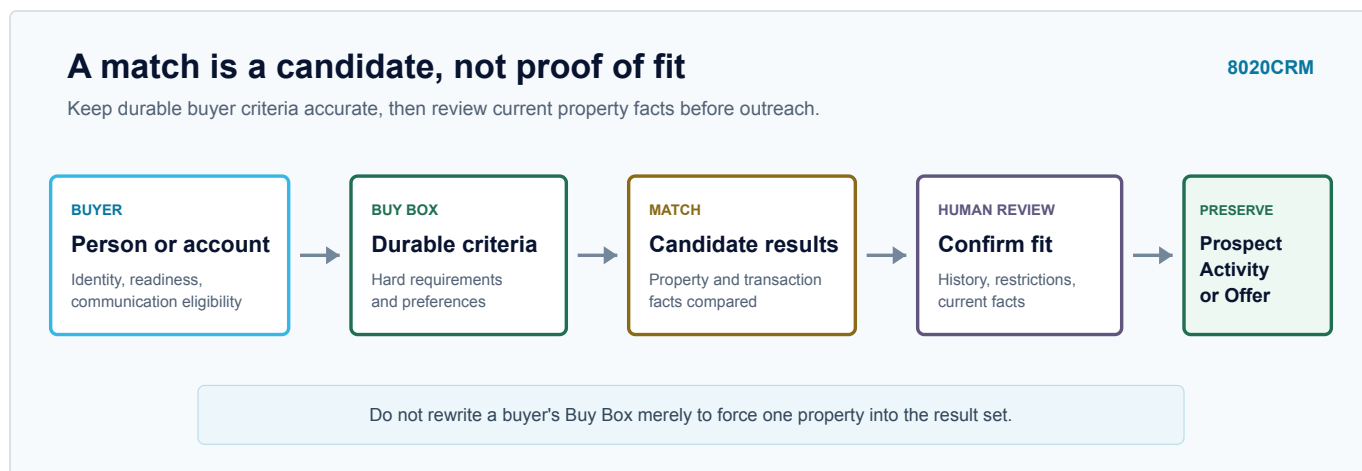
Symptom	Check first
Form or tab is missing	Application, Lightning page, record type, custom permission, profile, form factor, and lifecycle condition
Section is blank	Active template, record context, controlling values, field access, and related-record access
Field is unexpectedly required	Conditional rule, record type, controlling answer, validation rule, and base field requirement
Save fails	Required and allowed values, validation, duplicate rules, record access, related-record access, and later automation
Wrong record changed	Launch record, active Property, lookup selections, browser tab, and relationship shown in the form header

Before resubmitting, refresh the authoritative record. Repair only the missing part when some values or related records already committed.

The form journey is complete when the authoritative record retains the intended values, any created Offer or relationship opens under the correct parent, and the next owner and activity are clear. Use Record pages, tabs, and guided workspaces when the correct lifecycle tab is unclear.

Buy Box, buyer matching, and prospecting

Record buyer criteria on the correct person or account, match eligible properties, and preserve buyer interest as traceable prospect and offer activity.



A Buy Box defines reusable criteria; matching identifies candidates, while saved interest preserves the buyer's decision for each property.

Before you begin

You need access to the intended Contact, Account, or Person Account; its Buy Box; the candidate Property and Property Transaction; and any Prospect, activity, or Offer created from the match. Confirm duplicate policy, communication eligibility, matching ownership, and which criteria are hard requirements before editing.

Use the Buy Box for durable criteria

From the App Launcher, open **8020CRM**, then **Contacts** or **Accounts** and the intended buyer record. The **Buy Box Form** appears on eligible Contact, Account, and Person Account pages. Use it to maintain the buyer's actual acquisition criteria, not the attributes of only one interesting property.

Criteria can include market or geography, property type, price or financial range, condition, strategy, bedrooms or units, timing, financing, and other configured preferences. Availability and exact fields depend on the installed definition and record type.

Some organizations can also expose an older Contact quick action named Buy Box that edits legacy buyer fields. Treat the current Buy Box record and Buy Box Form as the durable workflow unless the administrator has deliberately retained the legacy action.

Maintain buyer criteria

1. Confirm that the Contact, Person Account, or Account represents the intended buyer and is not a duplicate.
2. Review existing criteria, activity, related Opportunities, Property Transactions, Prospects, and Offers.
3. Update criteria from the buyer's stated requirements; distinguish hard requirements from preferences.
4. Record readiness, timing, financing, communication eligibility, and responsible owner.
5. Save and reopen the record to confirm the criteria.
6. Run or wait for the configured matching process, then review results rather than contacting every returned record automatically.

Work buyer matches from the deal

From **8020CRM > Property Transactions**, open the intended transaction and select **Buyers** when that tab is visible. It supports buyer prospecting for disposition and seller-side work. A match is a candidate, not proof of fit. Review the buyer's current criteria, the property's current facts, prior outreach, restrictions, and existing Offers before acting.

When a candidate becomes active interest, preserve it in the supported Prospect, relationship, activity, or Offer record. Do not overwrite a buyer's durable Buy Box simply to force one property into the result set.

Completion signals

Buyer setup is ready when the authoritative person or account has current criteria, an accountable owner, contact eligibility, and a next review point. Prospecting is complete for a candidate when the outreach or decision is recorded and any active interest is connected to the correct Property Transaction. An Offer, not a match score, proves proposed terms.

For eligible new buyer or investor Leads, automation can create an initial Buy Box. Reopen the Lead and verify the selected Buy Box relationship before creating another one.

If matching looks wrong

Check the buyer record and Buy Box first, then the Property and Property Transaction facts, market normalization, record status, configured ranges, ownership, subscriptions, prior prospect records, and any pending recalculation. Broadening criteria can increase noise; correct inaccurate source values before changing the matching design.

After a correction, refresh the existing match result before creating another Prospect or Offer. Continue with Retail buyer lifecycle for represented buyer work and Offers, contracts, and closing when a candidate advances to proposed terms.

Acquisition and disposition workspaces

Use the 8020CRM acquisition and disposition workspaces with the correct active Property, offers, financial inputs, and save verification.

8020CRM acquisition and disposition workspaces keep property context, deal status, offers, and planning inputs together. Acquisition work normally starts from an Opportunity. Disposition work normally starts from a Property Transaction. In both cases, the selected Property Transaction determines which Property and related values the workspace reads or updates.

Labels such as **Acq**, **Dispo**, section names, and action names are configurable. Your organization can display different labels or a different set of sections without changing the purpose of the workflow.

Acq

Lead

Appts

Offers

Financials

Acquisition Team & Status

Analysis & Di...

Underwriting ...

Appointment ...

Offer Sent

Negotiate/Nu...

Contract Signed

Lead Manager

Demo User

Appointment Status

Pending

Underwriter

Underwriting Approved

Acq Agent

Acq Status

Opp & Contacts

Primary Contact

Synthetic Acquisition Opportunity

Seller 2

Demo User

Opp Owner

Demo User

Rating

Property Condition

Financials & Underwriting

Current Offer & Contract

This explicitly synthetic Opportunity shows one configured acquisition form. Open section headings and tabs can vary by lifecycle, form definition, and access.

Prerequisites

Before entering or changing values, confirm:

- The Opportunity represents the intended deal and has the correct owner, lifecycle, and related Property Transactions.
- Acquisition work has an active Property Transaction selected for the Opportunity.
- Disposition work starts from the intended Property Transaction and its related Opportunity.
- The user can read and edit the Opportunity, Property Transaction, Offer, and fields required by the visible sections.
- Required record types, statuses, disposition or exit-strategy choices, and validation values are available.
- Local financial assumptions have been calibrated by an authorized administrator before estimates are used for a decision.

If no active Property Transaction is available, use the Property selector to choose or add the Property being evaluated. Do not enter an offer or run estimates until the workspace header and Property details identify the intended record.

Confirm the active Property context

An Opportunity can have more than one Property Transaction. The active Property context identifies the transaction currently being evaluated. Selecting a different Property can change the offer, financial inputs, status, and calculated values shown in the workspace.

When a workspace offers a combined totals view, use it to compare or summarize multiple Properties. Exit the totals view before editing an individual Property Transaction. Before every save, confirm the Property address or name, the related Opportunity, and the transaction shown in the workspace.

Complete acquisition work

1. Open the Opportunity and select the acquisition workspace.
2. Confirm the active Property Transaction and seller or primary-contact context.

3. Review existing stage, status, property facts, condition, valuation, and rehab information before changing values.
4. Complete the visible financial assumptions and choose the intended exit strategy when required. Deal calculators explain how to validate estimates.

Acquisition Team & Status

Analysis & Di... Underwriting ... Appointment ... Offer Sent Negotiate/Nu... Contract Signed

Lead Manager

Demo User

Underwriter

Acq Agent

Appointment Status

Pending

Underwriting Approved



Acq Status

Op & Contacts

Primary Contact

Synthetic Acquisition Opportunity

Opp Owner

Demo User

Seller 2

Demo User

Rating

Property Condition

Financials & Underwriting

Calculator

Standard - 70% ARV

% ARV Rule (eg 70%)

Use % ARV Rule

Use \$/ft

* Using 70% ARV Rule for MAO & \$25 PSF for Rehab Cost

Deal/Dispo Type

ARV

Est Rent

Optional Fields

CMA/AVM

Zestimate

Asking Price

Listing Status

Incomplete

Current Acq Amount

\$225,640

Overri
de

Est Rehab Cost*

Est Holding Cost*

Est Closing Cost*

Your Total Est Cost*

Your Est Gross Profit*

Gross Profit Margin: 0.0% *Calcs are using MAO & Suggested Sale Price

Est. Percent ARV: 45.1%

Est. Rehab: \$20 / sft

Est. Rent Rule: 0.9%

Est. Cap Rate: 5.8%

Comps

Calculate

* Recalculate Estimates with/without Overrides

The calculator is part of the guided form, but its source assumptions and saved outputs belong to the active Property Transaction. Values shown are synthetic training data.

1. Enter acquisition offer terms only after confirming the offer direction, amount, selected Property Transaction, and Opportunity.
2. Save once and wait for the workspace to finish refreshing.
3. Open the Opportunity, selected Property Transaction, and Offer separately. Confirm that each retained the intended values and relationships.
4. Record the next activity, approval, offer delivery, or contract step.

Configured sections can include seller and Property context, valuation, condition and rehab, strategy estimates, offer terms, offer status, and acquisition milestones. A controlling answer can reveal another section or make an input required.

Complete disposition work

1. Open the Property Transaction and select the disposition workspace.
2. Confirm the related Opportunity, Property, transaction direction, and current disposition or exit strategy.
3. Review valuation, rehab, pricing, readiness, marketing, prospect, showing, and milestone information that is visible in your configuration.
4. Enter disposition offer terms only after confirming the buyer context, amount, dates, and selected Property Transaction.
5. Use configured actions for readiness, prospects, or showings only when the displayed record context is correct.
6. Save once and wait for the workspace to refresh.
7. Open the Property Transaction and any created or updated Offer separately to confirm the result.
8. Continue with the accepted-offer, contract, or transaction workflow when applicable.

Not every organization exposes every section or action. Treat the visible labels and requirements as configured business policy, and ask an administrator when an expected section is absent.

Confirm a save

A closed edit state or refreshed workspace is a positive signal, but it is not enough by itself. Confirmation is complete only when:

- The Opportunity still points to the intended active Property Transaction.

- The Property Transaction contains the new status, property, and financial inputs.
- A created or updated Offer has the intended direction, amount, dates, and relationships.
- No validation or save error remains visible.
- Reopening the workspace shows the retained values.

Offer creation can display its own confirmation separately from the rest of the workspace save. Verify the records even when a success message appears.

Recover from a partial save

The workspace can update more than one durable record. If one update fails, another record may already have saved. Repeating the entire entry without checking can create a duplicate Offer or overwrite a value that was retained.

1. Stop and capture the visible error text and the record context.
2. Refresh the Opportunity, selected Property Transaction, and related Offer in separate tabs.
3. Identify which values and relationships were saved and which are still missing.
4. Correct the specific access, required-value, allowed-value, duplicate, or validation issue.
5. Re-enter only the missing information. Search for an existing Offer before creating another one.
6. Save once, reopen each affected record, and confirm the final state.
7. Escalate with record names, time, user action, and error text if the same part fails again.

Do not run or rely on a calculator after a validation or save error. Resolve the error, confirm the source inputs, save successfully, and then recalculate.

Troubleshooting

Symptom	Check first
Workspace or tab is missing	Lightning page assignment, app, record type, lifecycle, device, and user access
No Property is shown	Opportunity relationships, active Property Transaction selection, and record access
Wrong values appear	Selected Property Transaction, totals view, browser tab, and related Opportunity

Symptom	Check first
Offer cannot be created	Offer amount, direction, required terms, duplicate rules, and access to the related records
Financial section is incomplete	Exit strategy, controlling answers, source property facts, field access, and local configuration
Save fails	Required and allowed values, validation rules, record access, duplicate rules, and downstream automation
Some values saved but others did not	Follow partial-save recovery and repair only the missing record or value

Best practices and ownership

8020CRM owns the guided workspace behavior, active Property context, configured sections, and supported offer and calculation actions. Salesforce owns record access, sharing, field access, validation rules, Lightning page assignment, and the base save platform. Your organization owns data correctness, approval policy, calculator calibration, and the decision to proceed with an offer.

Keep one authoritative Property Transaction selected, review source facts before estimates, save once, and verify durable records after consequential changes. Use Guided forms by lifecycle for form selection and Offers, contracts, and closing for downstream offer control.

Deal calculators

Run and validate 8020CRM deal estimates using the correct Property Transaction, exit strategy, source inputs, and locally calibrated assumptions.

8020CRM deal calculators turn saved Property and deal assumptions into planning estimates for an acquisition or disposition scenario. They support comparison and consistent review; they do not provide financial, investment, tax, legal, lending, appraisal, or construction advice.

Calculator and button labels are configurable. Your organization can expose a different label or subset of estimates while following the same control process.

Acquisition Team & Status

Analysis & Di...	Underwriting ...	Appointment ...	Offer Sent	Negotiate/Nu...	Contract Signed
Lead Manager Demo User	Underwriter	Acq Agent			
Appointment Status Pending	Underwriting Approved 	Acq Status			

Opp & Contacts

Primary Contact Synthetic Acquisition Opportunity	Opp Owner Demo User
Seller 2 Demo User	Rating

Property Condition

Financials & Underwriting

Calculator ⓘ Standard - 70% ARV	Current Acq Amount \$225,640	Overri de
% ARV Rule (eg 70%) ⓘ Use % ARV Rule	Est Rehab Cost*	☐
Use \$/ft	Est Holding Cost*	☐
* Using 70% ARV Rule for MAO & \$25 PSF for Rehab Cost		
Deal/Dispo Type ARV	Est Closing Cost*	☐
Est Rent	Your Total Est Cost*	☐
	Your Est Gross Profit*	☐
Optional Fields		
CMA/AVM Zestimate	Gross Profit Margin: 0.0% *Calcs are using MAO & Suggested Sale Price	
Asking Price Listing Status	Est. Percent ARV: 45.1%	
Incomplete	Est. Rehab: \$20 / sft	
	Est. Rent Rule: 0.9%	
	Est. Cap Rate: 5.8%	

> Comps

Calculate

* Recalculate Estimates with/without Overrides

This synthetic example shows one configured 70 percent ARV scenario. The selected profile, assumptions, strategy, labels, and visible outputs can differ by organization and deal.

Prerequisites

Before calculating, confirm:

- The Opportunity and active Property Transaction identify the intended Property.
- The correct approved calculator profile is associated with the deal, or the organization-approved default applies.
- The intended exit strategy is selected.
- Current valuation, price, rent, condition, size, rehab scope, timing, financing, and cost assumptions are saved where applicable.
- The user can edit the Property Transaction fields that receive estimate updates.
- An administrator has calibrated local assumptions and documented their owner and effective date.

Do not calculate from a combined totals view. Select the individual Property Transaction that should receive the results.

Understand the assumptions

Depending on the selected strategy and local configuration, calculation inputs can include:

- Current acquisition, offer, asking, valuation, and comparable-market context.
- Property facts such as living area, rooms, condition, and material rehab scope.
- Expected rent, holding period, repair duration, and market time.
- Financing or cost-of-capital assumptions.
- Closing, commission, transaction, and carrying-cost assumptions.
- Locally approved unit costs, target returns, margin policy, and strategy settings.

The calculator uses the saved inputs and selected profile available when it runs. A default, old, or incomplete value can produce a valid calculation that is still unsuitable for the current decision.

Run a calculation

1. Open the acquisition or disposition workspace for the intended Property Transaction.
2. Confirm the Property, related Opportunity, selected calculator profile, and exit strategy.
3. Review source inputs and update facts or assumptions that have changed.
4. Save the workspace. If validation or save fails, stop and resolve it before calculating.

5. Run the configured calculator action once and wait for it to finish and refresh the workspace.
6. Review the output families that apply to the selected strategy.
7. Reopen the Property Transaction and confirm key estimates were retained.
8. Compare results with current evidence and obtain the approvals required by your organization.

Changing an input does not make an existing output current. Save and recalculate after a material source change.

Outputs to review

The calculator can update several kinds of estimates, depending on data and configuration:

Output family	Examples of what it supports
Property economics	Estimated rent or cap-rate context
Preparation	Rehab, repair, or strategy-specific preparation estimates
Time and carrying	Holding and cost-of-capital estimates
Transaction costs	Acquisition, disposition, closing, commission, or double-close estimates
Offer and price guidance	Maximum allowable offer, buy-now, or suggested sale-price estimates
Strategy comparison	Total estimated cost, potential profit or margin views, and comparable exit scenarios

Not every output appears for every strategy. Displayed profit or margin values remain estimates and can depend on other saved values. The guide intentionally describes input and output categories without disclosing formulas or internal weighting.

Confirm and validate the result

A completed action or refreshed screen is not enough by itself. Confirm that:

- No validation or save error appeared before the calculation.
- The active Property Transaction is still the intended record.
- The selected exit strategy and calculator profile are unchanged.

- Key source inputs match current evidence.
- Expected estimate fields changed or remained unchanged for an understood reason.
- Reopening the Property Transaction shows the same retained outputs.

Compare results with recent comparable evidence, contractor or vendor bids, lender and title information, current taxes and insurance, approved commission policy, and accepted contract facts. Record material overrides and the reason for them.

Recalculate safely

Recalculate after a material source input, strategy, or approved calculator profile changes. Before rerunning, preserve any baseline required by local approval or variance policy. Recalculation can replace current estimates.

Do not repeatedly run the calculator to search for a preferred result. Correct the source fact or approved assumption, document the change, and run once. Avoid recalculating a closed or approved deal unless the organization has a controlled reason and preserves the prior decision basis.

Troubleshooting

Symptom	Check first
Calculator action is missing	Workspace configuration, active form, lifecycle, page assignment, and user access
Calculation does not start	Required source values, exit strategy, active Property Transaction, and validation messages
Output is blank	Applicable strategy, source inputs, approved profile, field access, and active calculation process
Output appears stale	Save inputs, refresh, confirm profile and strategy, run once, and reopen the transaction
Result appears unreasonable	Wrong Property, stale valuation, incomplete rehab scope, timing, local rates, or strategy mismatch
Values changed unexpectedly	Identify the last recalculation and compare saved inputs, profile, strategy, and prior baseline

If a workspace save partially failed, reconcile the Opportunity, Property Transaction, and Offer before calculating. Acquisition and disposition workspaces explains partial-save recovery.

Local calibration and ownership

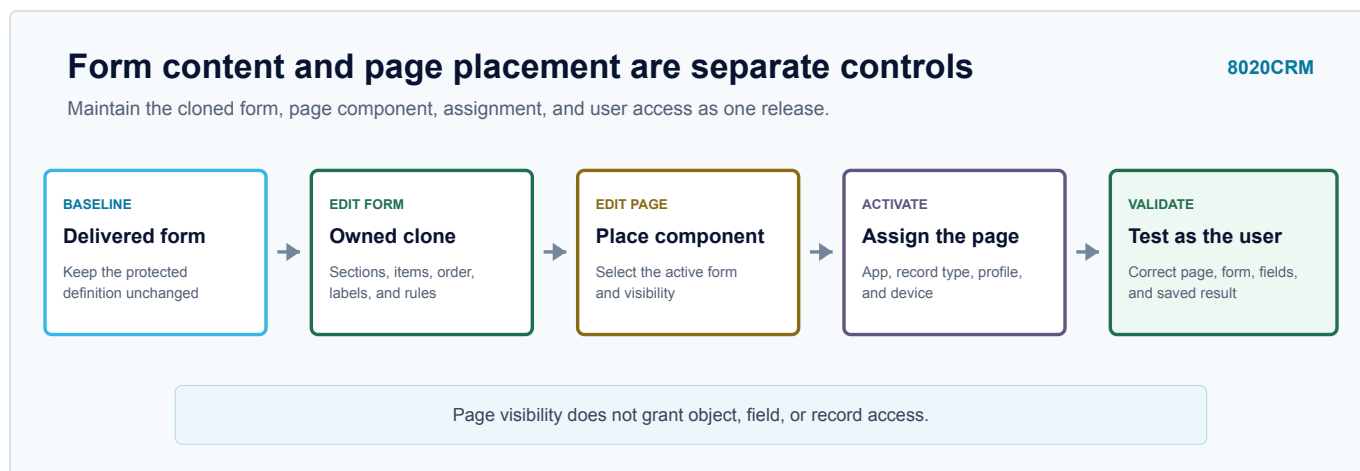
8020CRM owns the supported calculation process and the estimate categories it updates. Salesforce owns record access, validation, data storage, and the automation runtime. Your organization owns local economics, source-data quality, approval policy, and every business decision based on the estimates.

An authorized administrator should calibrate labor and material costs, taxes, insurance, utilities, financing, closing and commission assumptions, market time, rent and valuation practices, and target policy for each market. Test representative low, typical, and high-complexity deals before adoption. Review assumptions on a defined cadence and whenever market conditions or business policy change.

Use Financials, commissions, and attribution to keep planning estimates distinct from accepted terms and actual results.

Administer guided forms and Lightning pages

Clone and edit 8020CRM guided forms, then select, activate, assign, and validate the Lightning record pages that host them.



Treat form content, page placement, visibility, and assignment as separate controls that must be tested together.

8020CRM guided-form administration has two separate editing surfaces. **Edit Form** changes the form definition inside the guided-form component. Salesforce **Edit Page** opens Lightning App Builder and changes where components appear, which form a component uses, when it is visible, and who receives the page.

Do not use one surface as a substitute for the other. A correct form can be placed on the wrong page, and a correctly assigned page can point to the wrong form.

Prerequisites and access

Before changing a form or page, confirm:

- An authorized 8020CRM administrator can access the form administration controls and the form-definition records.
- A Salesforce administrator can edit and activate Lightning pages.

- Both administrators have appropriate object, field, record, and app access for the target user journey.
- The source managed/default form, intended host record, app, record types, profiles, and device form factors are known.
- A representative test record and test user exist for every intended assignment.
- Current form and page assignments are documented so rollback does not depend on memory.

Page visibility and assignment do not grant record or field access. Test the end-user permission context separately from the administrator context.

Choose the correct editor

Task	Use	What it changes
Change sections, items, order, labels, requirements, or form rules	Edit Form	The selected 8020CRM guided-form definition
Place or remove the guided-form component	Edit Page	The Salesforce Lightning page
Select which active form the component displays	Edit Page	A component property on that Lightning page
Change tabs, component visibility, or page regions	Edit Page	The Salesforce Lightning page
Assign by app, record type, profile, or device	Activate in Lightning App Builder	Salesforce page activation and assignment

Screen and section labels are configurable. Validate by function and record context, not only by matching a label from another organization.

Clone a delivered form

8020CRM-delivered managed/default form layouts are protected so upgrades have a stable baseline. Do not attempt to edit the delivered definition. Clone it to create a subscriber-owned form that your organization can maintain.

1. From the App Launcher, open **8020CRM**, then a representative record where the delivered form appears. Use the authorized form administration control to open that source form.
2. Confirm the source form, lifecycle, source record, sections, and current page placement.
3. Select **Clone Form** and give the clone a durable business name that distinguishes it from the delivered form.
4. Wait for clone completion and open the new form.
5. Confirm that top-level sections, subsections, items, buttons, and required supporting inputs copied as expected.
6. Review the clone's active state. A clone can inherit settings, so do not assume it is inactive or ready for users.
7. Make changes only on the subscriber-owned clone.

Keep the delivered form unchanged as a comparison and recovery reference.

Edit sections and items

Use **Edit Form** on the cloned form:

1. Review the full form before moving anything. Conditional sections can be absent until a controlling value is set.
2. Use the section up or down arrows to move a section one position at a time. Subsections move within their parent section.
3. Drag an item to the target position to reorder it within a section.
4. Drag an item into another section to move it across sections. Drop it in the intended position or column and wait for the form to refresh.
5. Review labels, help, required behavior, visibility, default values, buttons, and calculator actions affected by the move.
6. Save or finish the edit state as provided by the form editor, reopen the form, and verify the retained order.

A moved item keeps its business meaning but can encounter different section visibility or user expectations. Cross-section movement therefore requires functional validation, not only a visual check.

Validate the cloned form

Test the clone before selecting it for users:

- Open representative records for every relevant record type and lifecycle.
- Confirm all expected sections, subsections, items, buttons, and calculation actions are present once.
- Exercise controlling answers that show, hide, require, or clear dependent inputs.
- Test create, edit, read-only, validation-error, save, and reopen behavior.
- Verify related-record changes, including Property Transaction and Offer relationships where applicable.
- Test desktop and mobile form factors that the target page supports.
- Compare a least-privilege user with an administrator so hidden access problems are not missed.

Cloning success is evidence that the definition was copied. It is not proof that the clone is valid for the organization's page, permissions, record types, or business rules.

Publish and place the form

Publishing in this workflow has two independent parts: the cloned form must be active and selectable, and the Lightning page that uses it must be saved, activated, and assigned.

1. Confirm the clone is active only when validation is complete. Inactive forms are not expected to be selectable in the page component.
2. From a representative record, select the Setup gear, then **Edit Page** to open Lightning App Builder.
3. Select the guided-form component and choose the validated active clone in its form setting.
4. Review component visibility, tab placement, surrounding record context, and supported form factors.
5. Save the Lightning page.
6. Activate and assign the page to the intended org default, app, record type, profile, and form factor combination.
7. Open a fresh session as each representative user and confirm the intended page and form load.

Salesforce provides the Lightning App Builder  foundation and a focused Create a Custom Lightning Record Page  module for record-page composition. Use Salesforce Activate Lightning Pages  guidance for activation and assignment precedence. Release teams that deploy page definitions can consult the official FlexiPage metadata reference .

Confirmation signals

Administration is complete when the subscriber-owned clone reopens with the intended structure, appears as the selected form in the guided-form component, the Lightning page is active for the intended assignment, and representative users see the correct page and can complete the expected workflow.

Confirm both negative and positive access: intended users can reach the form, unintended users do not gain administrative controls, and page visibility does not expose records or fields they otherwise cannot access.

Troubleshooting

Symptom	Check first
Default form cannot be edited	Confirm it is a delivered protected form and clone it
Clone reports success but is incomplete	Deactivate the clone, compare sections, items, buttons, and supporting inputs with the source, and repair or replace it before page placement
Clone is not listed on the page component	Clone active state, save completion, component refresh, and administrator access
Section order did not change	Correct clone, edit mode, adjacent arrow direction, refresh, and retained order
Item returned to its prior location	Correct drop target, save completion, refresh, section access, and validation
Form works for an administrator only	Object, field, record, custom access, component visibility, and page assignment
Correct form appears on the wrong records	App, record-type, profile, org-default, and form-factor assignments
Page was saved but users still see the old page	Activation, assignment precedence, app, record type, profile, form factor, and fresh session

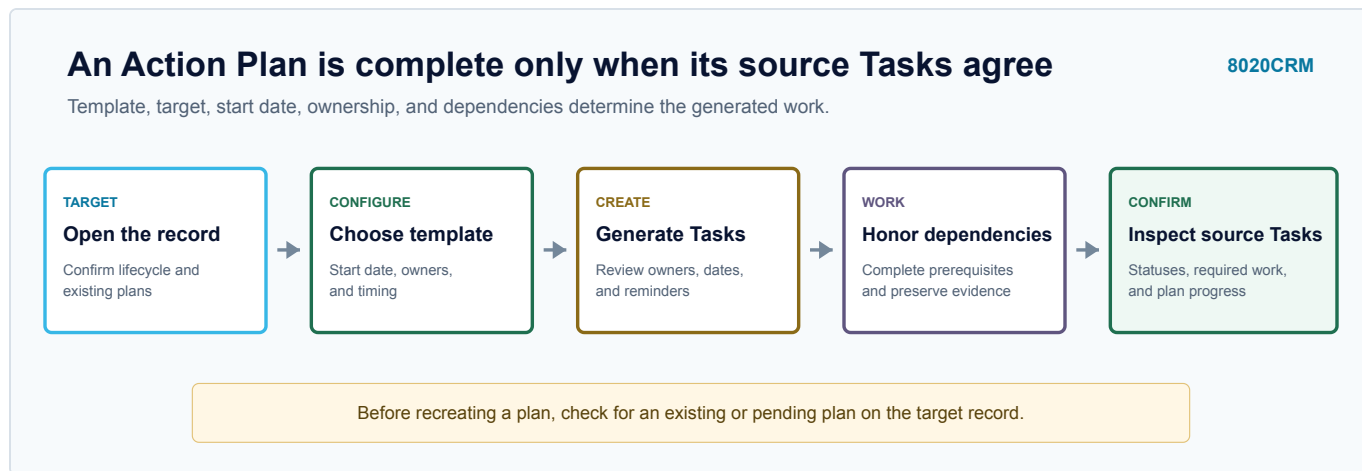
Best practices and ownership boundaries

8020CRM owns delivered form definitions, cloning behavior, form-editor controls, and the guided-form runtime. The subscriber organization owns cloned definitions, configurable labels, validation, business policy, and change approval. Salesforce owns Lightning App Builder, Lightning page activation and assignment, record access, sharing, and field access.

Use a named clone per controlled business variation, keep changes small, test every conditional branch affected, and record which active form is selected on each assigned page. Record pages, tabs, and guided workspaces explains the intended page context; Setup, access, and launch readiness covers broader rollout controls.

Action Plans

Create and operate repeatable 8020CRM Action Plans with the right template, start date, task owners, dependencies, and completion evidence.



The plan organizes the work, but completion is evidenced by the resulting Tasks on the target record.

What an Action Plan does

An 8020CRM Action Plan turns a repeatable process into owned Salesforce Tasks related to one business record. A template supplies the task subjects, order, owners, priorities, due-date rules, reminders, and prerequisites. The plan tracks progress as those Tasks are completed.

Action Plan and related-list labels can be customized. Use the configured label on the active record page when it differs from this guide.

Salesforce's Action Plans overview [🔗](#) describes the general template-to-task pattern. 8020CRM owns the templates and business rules available in your organization; Salesforce edition notes for its separate cloud features do not determine 8020CRM availability.

Before you begin

Confirm the target record, process, start date, and responsible team. You need access to the record, the Action Plan area, the selected template, and the Salesforce Tasks that will be created. Verify that record owners and any user fields used for assignment are current.

Create a plan

1. From the App Launcher, open **8020CRM**, then the supported object tab and the record that owns the process.
2. Open the configured Action Plans area and start a new plan.
3. Select the template for the record type and business process.
4. Confirm the plan name and start date.
5. Review whether weekend due dates are avoided and how they move when they fall on a weekend.
6. Review each task's subject, priority, owner strategy, days to complete, reminder, and prerequisite.
7. Save once and wait for the plan and initial Tasks to appear.
8. Open representative Tasks and confirm their owner, due date, status, and related record.

Some plans can also start from configured record changes. After a qualifying status update, check for an existing or pending plan before creating one manually.

For several records, use the delivered **Create Action Plans** list action only after selecting the intended rows explicitly. Follow Bulk and record actions for supported objects, selection checks, and partial-failure recovery. Template design and XML import belong to Administer the Action Plans app.

Work the plan

Use the Salesforce Task as the user's work item. Update its status, owner, due date, and notes through the approved Task experience. Salesforce's Tasks documentation [explains the standard Task surfaces and notifications](#).

A dependent Task can remain unavailable until its prerequisite closes. Completing the prerequisite can release the next work and calculate its due date. Do not bypass the prerequisite by creating an unrelated duplicate Task.

Confirm completion

A correctly created plan appears on the intended record and shows the selected template and start date. Initial Tasks have the intended owners and due dates. Dependent Tasks appear or become actionable after their prerequisites complete.

Plan progress should agree with the number of completed plan Tasks. Completion is supported by the source Task statuses, not by the percentage alone.

If it does not look right

- If a template is missing, confirm the target record type, template availability, archive state, and user access.
- If no plan appears after an automated trigger, refresh and allow expected processing to finish before creating one manually.
- If a Task is missing, check whether it depends on an incomplete prerequisite.
- If an owner is wrong or blank, inspect the template's assignment choice, current record owner, referenced user field, and user availability.
- If a due date is wrong, check the plan start or trigger date, offset, prerequisite date, and weekend rule.
- If a Task cannot be completed, check whether its prerequisite is still open and whether the selected status is valid.
- If progress is stale, correct the Salesforce Task status and refresh; do not directly adjust the percentage.
- If a duplicate plan exists, stop work on the duplicate and have an administrator determine the correct plan before deleting anything.

Best practices

Use one template for one stable process, with unambiguous task subjects and owners. Keep dependencies only where sequence matters. Test owner and due-date resolution with ordinary users before broad use. Manage Files through Files and record documents, not as an undocumented substitute for plan completion.

Files and record documents

Upload, link, verify, version, share, and safely remove Salesforce Files from the correct 8020CRM record.

What this workflow does

8020CRM uses Salesforce Files for documents, images, videos, and other supporting content related to business records. A file has its own identity and versions; a record link makes it available from a Lead, Contact, Account, Opportunity, Property, Property Transaction, or other supported record.

The Activity Composer Files action can show categories such as **Thumbnail**, **Photos & Videos**, and **Contracts & Documents**. Category labels, accepted formats, whether multiple files are allowed, and which sections start expanded are configurable.



Thumbnail0

Upload Files

Or drop files

Photos & Videos0

Upload Files

Or drop files

EXTERNAL LINKS

Save URLs

Photos URL

Virtual Walkthrough URL

https://photos.example.chttps://walkthrough.exan

Contracts & Documents0

Upload Files

Or drop files

This configured example separates record media from external links. Your page can use different categories and restrictions.

Salesforce owns file storage, versioning, preview, and standard access behavior described in Salesforce Files . 8020CRM owns the configured file categories and record-centered upload experience.

Before you begin

Confirm the authoritative record, document purpose, sensitivity, retention requirement, and intended audience. Use a meaningful final filename. Remove hidden comments, unnecessary personal data, and image location metadata when policy requires it.

Upload and verify a file

1. Open the record that should own the document context.
2. Open **Files** in the configured record workspace.
3. Choose the category that matches the document purpose.
4. Select the file or files allowed by the configured control.
5. Wait until upload processing finishes. Do not close or resubmit while progress is active.
6. Confirm the file tile or row appears with the expected name and category.
7. Open the preview or file detail and confirm that the content is complete and readable.
8. Confirm an intended colleague can open the file from the same record when shared access is required.

Salesforce's Upload Files  explains standard upload locations and platform limits. Uploads from Files home can begin private; uploading from the intended record is the clearest way to establish record context.

Replace or share a document

When replacing an existing document, use the Salesforce file's version action where available so history stays together. Uploading another file with the same name can create a duplicate rather than a new version.

Before changing access or creating a share link, review File Privacy and Sharing . A public link, where enabled, can expose content beyond Salesforce record sharing and must follow organizational policy.

Chatter can attach a file to an internal post or question. Salesforce Trailhead's [Create Posts, Polls, and Questions](#) explains that collaboration path. A Chatter attachment is not proof that a document was delivered to a client, signed, approved, or linked to every intended business record.

Confirm the result

The file should appear from the intended record, open to the expected current version, and be accessible to the intended internal audience. The file detail should show the expected owner and sharing context. A public link or Chatter post, when intentionally used, should be verified separately.

If it does not look right

- If upload fails, check configured file type, size, connection, permission, and available storage before retrying.
- If the file appears on the wrong record, do not upload another copy. Have the link corrected after confirming the file identity.
- If another user cannot open it, check record access, file privacy, share level, and whether the user is in the intended Chatter group or audience.
- If preview is unavailable, download only through an approved device and verify whether Salesforce supports preview for that file type.
- If two copies exist, compare owner, upload time, content, versions, and record links before removing either one.
- If deletion is denied, stop and have an administrator review file ownership, sharing, related records, retention, and Salesforce access.

Delete with care

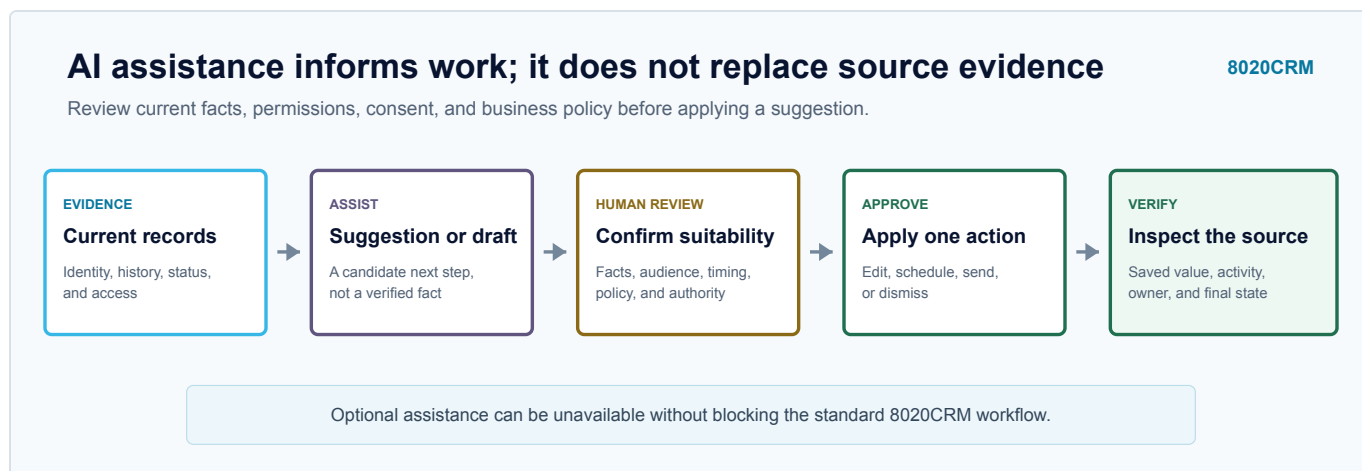
Removing a record link and deleting the Salesforce File are different operations. A **Delete File** action can remove the underlying file and all of its record links, not just the tile on the current page. Check the file's shared locations, versions, retention requirement, and owner before confirming deletion.

Best practices

Use one authoritative file with versions instead of repeated copies. Link it only to records that need it. Keep client delivery, signature, and approval evidence in their owning process rather than inferring completion from file presence. Review public links and broad Chatter sharing regularly.

AI assistance, suggestions, and automation

Review RAIN suggestions and property-driven alerts, distinguish optional intelligence from standard automation, and apply AI-assisted changes safely in 8020CRM.



AI output remains a suggestion until a person reviews it against the source record and decides what action is appropriate.

What this helps you do

Use assisted suggestions to notice changes, review recommended next steps, and act from current 8020CRM context. The suggestion records the recommendation and your response; the Lead, Opportunity, Property, Property Transaction, Task, Event, or Communication records the business result.

RAIN OS provides the shared suggestion and action experience used by 8020CRM. RAIN Intelligence is optional and separately available. It may add advanced analysis, summaries, drafting, buyer assistance, or comparable support where your organization enables it. Standard assignment, status, Action Plan, and scheduled automation can operate without optional intelligence.

Before you begin

Confirm that you can open both the suggestion and its related business record. Know which record owns the fact being proposed and whether your role may approve the change. External

communications, valuation decisions, and legal, financial, or contractual changes should receive the human review required by your organization.

Work through it

1. Open the suggestion or property-driven Deal Drop and note its related person, property, deal, owner, and generation time.
2. Open the related 8020CRM record. Compare the recommendation with current fields, recent activity, lifecycle state, and any updates made since generation.
3. Read the reason and supporting context. Treat a score, confidence, urgency, estimate, or generated text as decision support rather than proof.
4. Choose the available response that matches your decision: apply or approve, snooze, dismiss or clear, or create follow-up work.
5. Before applying a field change, confirm the proposed value belongs on that record and does not overwrite newer information.
6. Before sending generated content, check the recipient, purpose, consent, factual accuracy, tone, confidential information, and sender details.
7. After acting, open the resulting business record, Task, Event, or Communication. Confirm the expected owner, due date, field value, or delivery state.

Snooze a valid item when the timing is wrong. Dismiss or clear an item that is no longer relevant. Do not change business data repeatedly merely to force another recommendation.

Confirm the result

Review is complete when the suggestion has the intended response and the related record remains correct. An applied update is complete when the target value appears after refresh. Follow-up work is complete when the Task or Event exists. A Communication may move through submission, provider acceptance, and delivery at different times; verify the state required for the job.

If it does not look right

Type of issue	Check first
Access or configuration	Feature availability, placement, user access, record access, and whether optional intelligence is enabled

Type of issue	Check first
Record context	Eligibility, current lifecycle, owner, related records, saved search when relevant, and an existing or snoozed item
Delayed processing	Property evaluation, notifications, scoring, follow-up creation, or an approved action still completing
Connected service state	Optional service authorization and availability, plus Communication acceptance or delivery
Possible defect	A repeatable issue after current data, access, setup, existing output, and expected processing are confirmed

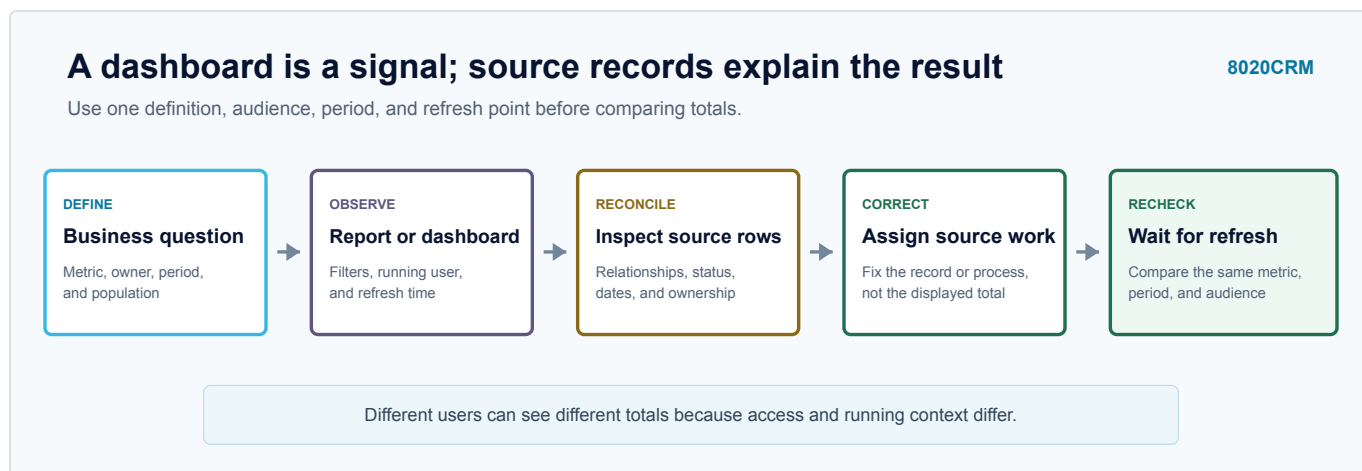
Refresh both the source record and the suggestion area before retrying. If part of an approved action already completed, retry only the missing action to avoid duplicate Tasks or Communications.

Related guidance

See Action Plans, forms, and files for structured follow-up and Troubleshooting and safe recovery for incomplete actions.

Reports, dashboards, and operational health

Interpret lifecycle, transaction, financial, marketing, adoption, and service-health analytics with reliable definitions and recovery checks.



A dashboard signal becomes actionable only after you confirm its definition, filters, date range, and supporting source records.

What this helps you do

8020CRM reports and dashboards help you review lead response, pipeline, property work, offers, closings, financial results, marketing, team activity, adoption, and recorded service usage. They summarize records available within a particular set of filters and access rules; they do not replace the underlying business records.

Use operational health reviews to answer two questions: whether customer and transaction work is progressing, and whether delayed or connected work is completing as expected.

Salesforce owns the reporting and dashboard platform summarized in Reports and Dashboards Overview 🌩 and Reports and Dashboards for Lightning Experience 🌩. This guide supplies the business definitions, source-record checks, and recovery sequence for the configured analytics.

Before you begin

Define the question before interpreting a number. Confirm the population, date field, period, lifecycle values, owner scope, unit, filters, and expected refresh delay. Also note whether the dashboard uses each viewer's access or a designated running context, because that can change what different users see.

On desktop, open the App Launcher, select **View All**, then **Reports** or **Dashboards**. These standard items are not in the packaged 8020CRM desktop navigation order unless an administrator adds them. The **Analytics** navigation item can open optional CRM Analytics and is not a substitute for the standard Reports or Dashboards area. Home dashboard panels and locally added navigation can provide additional entry points.

Salesforce owns the standard builders and dashboard execution context. Use Build a Report in Lightning Experience , Create Dashboards , and Dashboard Viewing Context  for those controls. The configured metric definition and authoritative business records determine whether the resulting number is meaningful.

Work through it

1. Open the selected Dashboard, refresh it, and note the reporting period, data time, and viewing context.
2. Identify the records behind an exception by lifecycle, owner, stage, milestone, and age.
3. Open the source report. Check its filters, date field, grouping, and record population before comparing totals.
4. Inspect representative detail records. For pipeline, start with Opportunities and related Property Transactions. For contract measures, review Offer direction, status, and dates. For financial results, review accepted terms and supporting financial detail. For marketing, review Campaign relationships, qualifying outcomes, dates, and Expenses.
5. Distinguish the unit being counted. One buyer Opportunity can have several Property Transactions and Offers; one investment can have acquisition and disposition milestones. Counts of people, deals, properties, offers, and closings answer different questions.
6. Assign data corrections through the process that owns the source record. Do not change a stage, date, or amount merely to make a chart match expectations.
7. Recheck after expected synchronization, financial rollup, Campaign reconciliation, score, external update, or dashboard refresh has completed.

Confirm the result

A review is complete when the metric definition and population are understood, users have appropriate access, and material exceptions have owners. Any expected delayed work should have a follow-up time. A persistent discrepancy should be traced to a source record, report definition, access difference, connected service, or support path.

Keep initial estimate, current estimate, contract amount, and actual result distinct. Treat Campaign attribution as the outcome of the organization's recorded relationships and rules, not proof that one Campaign exclusively caused a result.

If it does not look right

Type of issue	Check first
Access or configuration	Report and dashboard access, record visibility, available fields, folder sharing, and running context
Record context	Filters, dates, lifecycle, owner, Offer direction, relationships, and whether child rows repeat a parent
Delayed processing	Dashboard refresh, synchronization, financial rollups, Campaign reconciliation, or other queued work
Connected service state	Whether an external update completed, returned no result, or has not yet reconciled locally
Possible defect	A repeatable discrepancy after source records, definitions, access, configuration, and timing agree

If a Home dashboard is blank or hidden, open **App Launcher > View All > Dashboards** and open it directly. This separates Home component visibility from folder access, dashboard running context, source-report failures, and missing record access.

If two reports disagree, compare their detail rows before formulas. Before rerunning bulk or reconciliation work, confirm what already completed for each record. Never create duplicate financial or Campaign records to force a total.

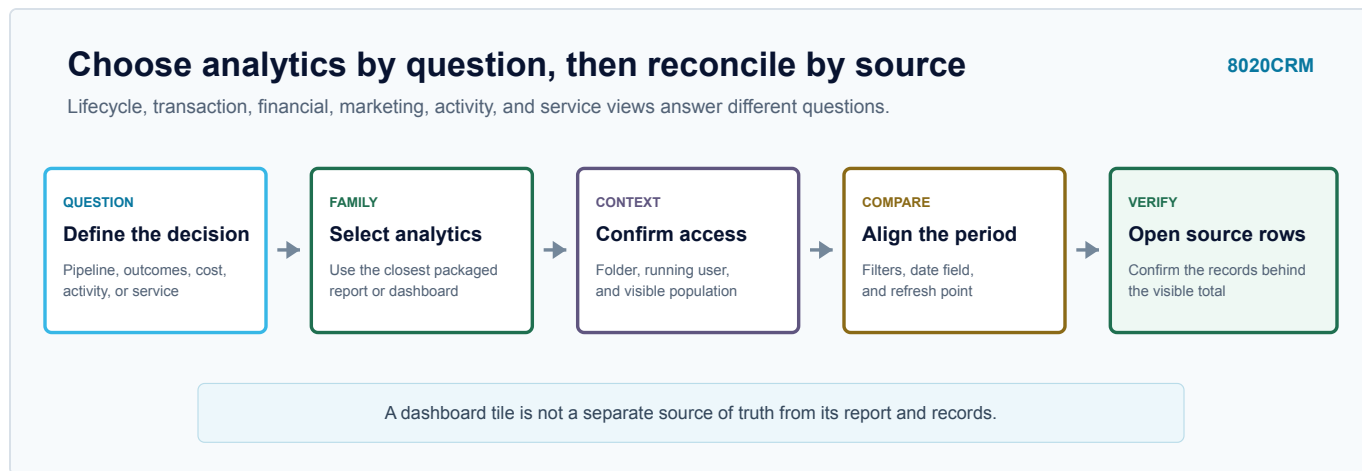
If the report or dashboard is unavailable rather than incorrect, review Salesforce's Report and Dashboard Folder Sharing . Salesforce owns folder access, while this guide covers the configured analytics and their business sources; folder access does not replace access to the underlying records and fields.

Related guidance

See Financials, commissions, and attribution for financial source checks and Administration, integrations, and data governance for access and monitoring ownership.

Report and dashboard catalog

Choose the right packaged analytics for lead, acquisition, disposition, retail, transaction, marketing, financial, adoption, and service-usage questions.



Start with the business question, select the matching report or dashboard, and verify the result against representative source records.

Start with the business question

The packaged analytics library is broad. Choose a domain first, then select the report and period that answer the question. Names can include time abbreviations such as TD, CW, LW, MTD, QTD, and YTD; confirm the actual report filter rather than relying only on the name.

You need folder access plus access to the source objects, fields, and records. Before relying on a dashboard, identify whether it runs as the viewer or a designated user and confirm that its source reports open for the intended audience.

Salesforce owns the standard reporting surfaces described in [Reports and Dashboards Overview](#) and [Reports and Dashboards for Lightning Experience](#). This catalog identifies the configured analytics families and the business questions they are intended to answer.

Analytics area	Typical questions
Lead operations	New and uncontacted Leads, time to contact, conversion, source, appointments, activities, and overdue Tasks
Opportunity pipeline	Open pipeline, stage movement, next steps, win rate, contract rate, and expected economics
Acquisitions	Seller appointments, offers, contracts, acquisition amounts, agent production, and speed through milestones
Dispositions	Buyer activity, disposition offers, contracts, final outcomes, and responsible team performance
Retail buyers and listings	Buyer and seller pipeline, appointments, offers, contracts, closings, commissions, and listing activity
Transactions	Active files, milestones, overdue work, closings, transaction coordination, and financial completion
Marketing	Lead source, paid and unpaid response, Campaign outcomes, Expenses, conversion cost, and Campaign Statistics
Adoption and service usage	Login or activity adoption, configured API usage, communication usage, and operational exceptions

Packaged dashboard families

Depending on installed capabilities and access, dashboards include:

- **Leadership Team Scorecard** for broad team performance.
- **Leads | Daily** and real-estate lead dashboards for daily intake and response.
- **Opportunity Stage and Next Steps** for pipeline attention.
- **REI Acquisitions, REI Dispositions**, and scorecards for investment operations.
- **Retail Leads, Retail Scorecard**, and retail daily views.
- **Campaign Statistics** and **Campaign Expenses** for marketing performance.
- **8020 Adoption Dashboard** and **Employee Engagement** for product and team adoption.
- **Deal Drops, Lost Revenue, Net Promoter Score**, and **API Usage** for specialized operational review.

Home shows selected dashboards according to role permissions. On desktop, use **App Launcher > View All > Reports** or **App Launcher > View All > Dashboards**, or use locally added navigation items; the standard areas are not part of the packaged desktop tab order. **Analytics** is a separate optional CRM Analytics entry. The packaged mobile app includes Reports and Dashboards directly. Folder access is still required in either route.

Use analytics safely

Use Salesforce's Build a Report in Lightning Experience  and Create Dashboards  for standard authoring controls. Local report or dashboard changes can alter the cataloged population or presentation, so validate the business definition and source records after customization.

1. Confirm the dashboard refresh time, period, running context, and filters.
2. Open the source report behind a chart.
3. Verify the date field, grouping, lifecycle values, owner scope, and counted unit.
4. Inspect representative source records.
5. Assign corrections to the process owner and recheck after synchronization or refresh.

One customer, Opportunity, Property Transaction, and Offer can represent different counting units. Child detail can repeat a parent. Keep initial, current, contract, and actual amounts distinct.

Access and troubleshooting

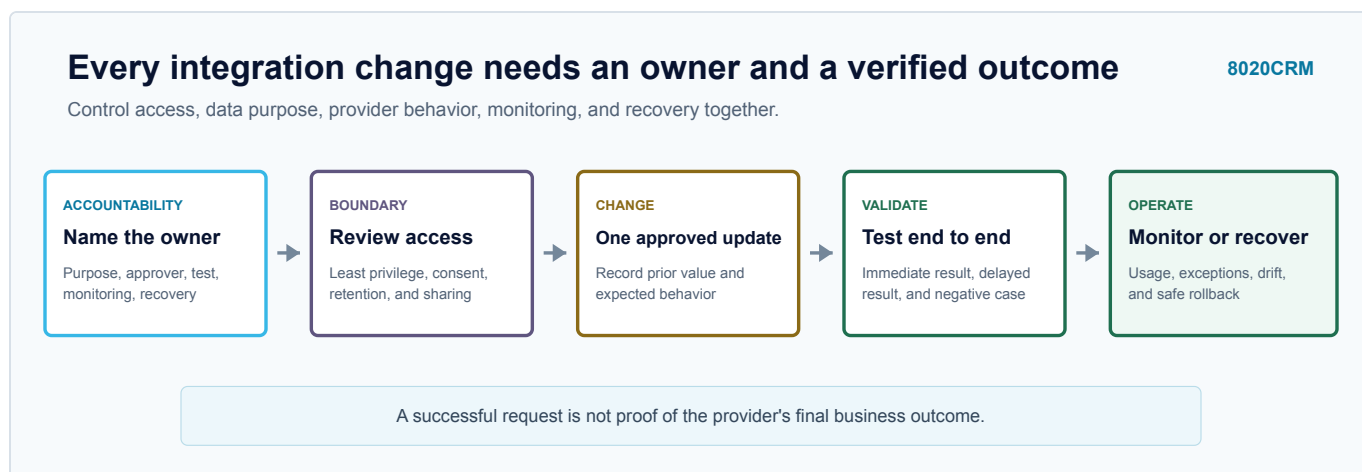
Folder sharing controls whether a user can open the analytics asset. Object, field, and record access control what rows and values the user can see. A dashboard running user can also affect the visible population. If two users see different totals, compare access and running context before changing the report.

Salesforce owns Report and Dashboard Folder Sharing  and Dashboard Viewing Context . The catalog boundary is the configured asset's purpose and expected data; platform access or running context does not redefine the underlying business metric.

When totals conflict, compare detail rows and formulas, then review delayed rollups, Campaign reconciliation, and dashboard refresh. Never change customer or deal data solely to make a chart match an expectation.

Administration, integrations, and data governance

Operate 8020CRM with controlled configuration, least-privilege access, accountable integrations, reliable data, and practical privacy safeguards.



Keep ownership, authorization, monitoring, and recovery aligned for each connection; a successful setup check is not ongoing assurance.

What this helps you do

Administration keeps 8020CRM access, configuration, connected services, and business data aligned with your organization's operating and governance policies. This is ongoing work: users change roles, business processes evolve, providers change, and retained data grows.

Before you begin

Name an accountable owner for access, business configuration, each connected service, data quality, privacy and retention, and operational monitoring. Retain the approved purpose, decision, test result, and review date for organization-wide changes. Keep credentials out of documentation and support notes.

Work through it

1. **Review access by job.** Confirm each role has the necessary 8020CRM availability, field access, record visibility, page access, report folders, and connected-service authorization. Avoid broad access as a shortcut for one missing capability.
2. **Control configuration changes.** Record the current setting and intended outcome. Test lifecycle choices, routing, forms, markets, financial templates, and Campaign conventions with representative positive and negative scenarios before release.
3. **Keep one owner for each result.** When more than one configured process could create or update the same records, use the approved process only. Competing paths can create duplicate financial, Campaign, or other outcomes.
4. **Govern connected services.** For each service, document its business purpose, approved data, owner, authorized users, expected capacity, normal completion signals, retry authority, support route, and offboarding obligations. RAIN Intelligence is optional and requires separate availability and setup.
5. **Protect data quality.** Define which record owns each shared business fact and how duplicates, missing relationships, and corrections are handled. Correct the source record before changing copied or summarized values.
6. **Use controlled bulk changes.** Validate owners, record types, relationships, and allowed values. Test a small sample, record expected counts, allow delayed work to finish, and reconcile created, updated, skipped, and failed records.
7. **Apply privacy and retention rules.** Limit collection, access, exports, and disclosure to approved purposes. Follow data through Contacts, Properties, Communications, Files, exports, backups, providers, and downstream systems when responding to retention or deletion requirements.
8. **Review regularly.** Check inactive users, external access, failed or delayed work, recurring schedules, service usage, provider outcomes, duplicate trends, report access, unresolved exceptions, and privacy obligations.

Salesforce owns permission-set administration and effective-access inspection. Use Permission Sets , User Permissions and Access , Assign Permission Sets , and User Access Summary  for those platform controls. This guide defines the governance decisions, job outcomes, and review evidence that those controls must support.

Salesforce also owns matching rules, duplicate rules, and duplicate alerts documented in Duplicate Management Overview  and Resolve and Prevent Duplicate Data . The governance boundary is the organization's definition of an authoritative customer, property, and deal record and its approved correction process.

Confirm the result

A controlled change is complete when the approved configuration is active, representative users can complete the intended work, and surrounding lifecycle outcomes remain correct. Connected work may continue after a record saves; provider acceptance and final delivery can also occur at different times. Reconcile the initiating record, related records, delayed work, provider evidence, and analytics.

If it does not look right

Type of issue	Check first
Access or configuration	Availability, role assignments, record sharing, page and report access, feature choices, and one approved process owner
Record context	Record type, lifecycle, owner, required relationships, authoritative value, and duplicate rules
Delayed processing	Queued, scheduled, bulk, or reconciliation work still in progress
Connected service state	Authorization, account or sender setup, capacity, provider acceptance, delivery, and valid no-result responses
Possible defect	A controlled, repeatable failure after access, approved setup, record context, provider state, and timing are verified

Before retrying a connected or bulk request, identify whether it was never submitted, remains in progress, partially completed, or completed without local reconciliation. Repeating it can repeat a charge, message, export, or data change.

Related guidance

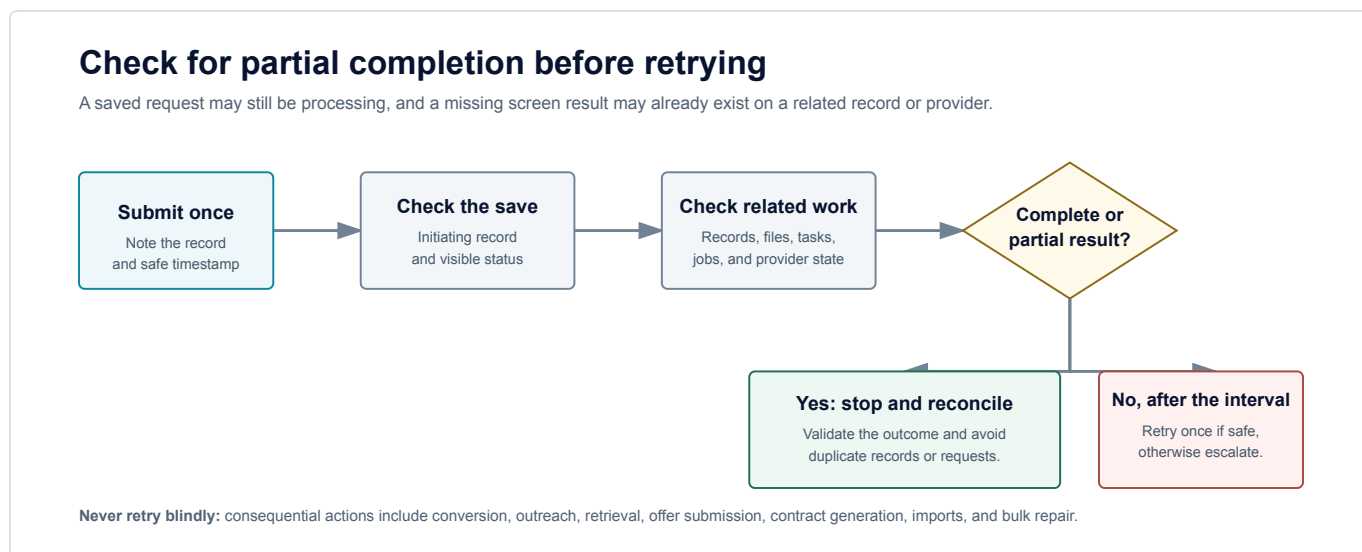
Use Reports, dashboards, and operational health for recurring reviews and Troubleshooting and safe recovery for incomplete outcomes.

Troubleshooting and safe recovery

Diagnose 8020CRM issues in execution order, recognize partial completion, choose safe retry points, and escalate with useful evidence.

What this helps you do

Use this sequence when an 8020CRM result is missing, late, or incorrect. A single action can save a starting record, update related records, begin delayed work, and submit a connected request. A successful save does not prove every later step finished, while a slow refresh does not prove the action failed.



Before retrying, distinguish missing work from delayed or externally completed work to avoid duplicates.

Before you begin

Preserve the symptom before changing data. Note the intended task, affected record type and business context, expected result, first observed difference, approximate time and time zone, and whether the starting record saved. Record whether the issue affects one user, one record pattern, or all comparable work.

Do not include credentials, private message content, unredacted personal data, or broad production exports in support notes.

Work through it

1. **Confirm record context.** Check the intended record, record type, owner, lifecycle state, relationships, and the record that should own the business fact.
2. **Check access.** Confirm product availability, user permissions, field access, record sharing, page access, report folders, and connected-service authorization.
3. **Check configuration.** Review the applicable routing, form, market, mapping, product, Campaign convention, feature choice, and service setup.
4. **Confirm qualifying input.** Compare current and previous values with the business event expected to start the work. Check required relationships and allowed values.
5. **Inspect immediate results.** Review the starting record and any directly created or updated records. A visible save error normally belongs here.
6. **Inspect delayed results.** Allow queued or scheduled work to finish, then look for partial completion, overlapping updates, or records that still need reconciliation.
7. **Check connected service state.** Determine whether the request was sent, accepted, rejected, returned no result, remains in progress, or completed without the expected 8020CRM update.
8. **Check local business controls.** Consider organization-specific validation, duplicate handling, and other processes that affect the same records.
9. **Check analytics last.** Verify the source report, filters, dates, relationships, access, and refresh expectations.

Stop at the first boundary that differs from a comparable successful record. Later symptoms are often consequences of that first difference.

Confirm the result

Before retrying, identify everything the first attempt created or changed. For intake or conversion, look for existing people, customer, deal, Property, and Property Transaction records. For an Offer, check whether it was created, marked current, or copied to related records. For Communications, check submission and provider state. For bulk work, identify committed and failed rows.

Correct the failed prerequisite or relationship, then resume only the incomplete step where supported. After recovery, review the surrounding record relationships, activities, financial and Campaign outcomes, and reports.

If it does not look right

Issue type	Safe response
Access or configuration	Compare with a working user or record one layer at a time; avoid broad elevation
Record context	Correct the authoritative record or missing relationship before any derived value
Delayed processing	Let active work finish and use a controlled, low-volume retry only for confirmed failures
Connected service or provider	Verify authorization, capacity, acceptance, delivery, and whether resubmission can duplicate a request or charge
Genuine defect	Escalate a repeatable issue with time, user role, anonymized context, steps, expected and actual results, and checks already completed

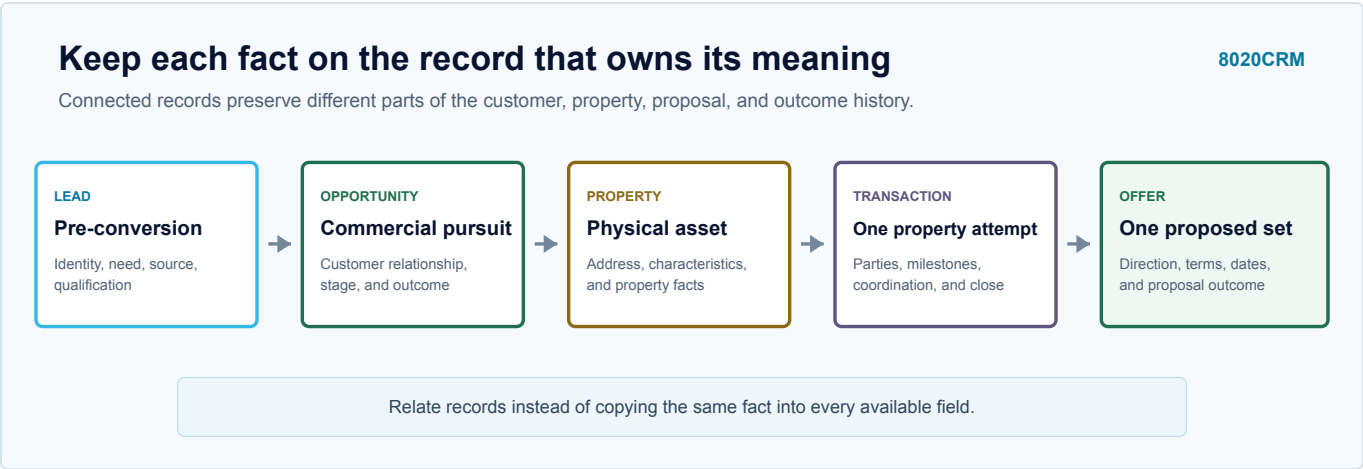
Related guidance

Use Record and terminology reference to identify the correct record owner and Administration, integrations, and data governance for controlled configuration recovery.

REFERENCE

Record and terminology reference

Understand the durable 8020CRM records, lifecycle terms, relationships, ownership concepts, and processing states used across customer and property work.



Record	Use it for
Account	The customer, household, person, company, or other relationship container used by your organization
Prospect	A candidate for a particular transaction or approved outreach purpose
Property	The durable identity, location, description, media, and available data for a physical property
Opportunity	Pipeline stage, ownership, forecast, source, and customer-level deal progress
Property Transaction	Operational work for a specific property, including parties, dates, coordination, Offers, costs, and close
Offer	A durable proposal and milestone history for acquisition, disposition, buyer, seller, or listing terms
Task	Assigned work or a completed action that does not reserve calendar time
Event	A meeting, appointment, call, or other scheduled activity
Communication	A supported call, text, email, or related communication with available submission and delivery states
Campaign	A marketing initiative connecting audiences, responses, spend, and resulting business
File	A document or media item stored and shared in the context of a record

An Opportunity and Property Transaction can represent two views of the same deal, but they are not interchangeable. The Opportunity answers where the relationship sits in the pipeline. The Property Transaction answers what work is happening for a particular property. One buyer Opportunity may relate to several property attempts.

Relationship and lifecycle terms

Owner is the user or queue accountable for a record. **Queue** holds eligible work for shared handling or assignment. A **team or role relationship** identifies how someone participates in a deal. **Primary** selects one relationship to represent a category. **Current** identifies the record that should drive present-day work without erasing history.

Record type selects a business variation. **Status** describes the state of a record or event. **Stage** describes pipeline or operating progress. **Disposition** is the selected handling or outcome strategy for a property-centered transaction. **Nurture** means a relationship remains relevant but is not ready for active progression.

Use the terminal outcome that describes what happened. Closed won, closed lost, cancelled, rejected, withdrawn, and similar outcomes preserve different business histories.

Processing terms

Term	Meaning
Authoritative value	The fact maintained on the record designated to own it
Derived value	A copied, calculated, or summarized value maintained from another record
Immediate processing	Work that finishes during the initiating save, often with a visible error if it fails
Delayed processing	Work that begins from a save or schedule and completes later
Partial completion	Some intended results exist while others do not
No result	A valid request completed without a matching response
Reconciliation	Comparing source facts, related records, delayed work, connected-service evidence, and reports

Choose the right record

Use the Lead for qualification before conversion, the Opportunity for pipeline progress, the Property Transaction for property-specific operations, the Offer for proposal terms and milestones, and the Property for the physical asset. Use a Task for assigned work, an Event for reserved time, and a Communication for supported channel and delivery context.

When records disagree, correct the authoritative source and relationship first. Do not edit every visible copy. If values remain inconsistent after the normal processing interval, follow Troubleshooting and safe recovery.

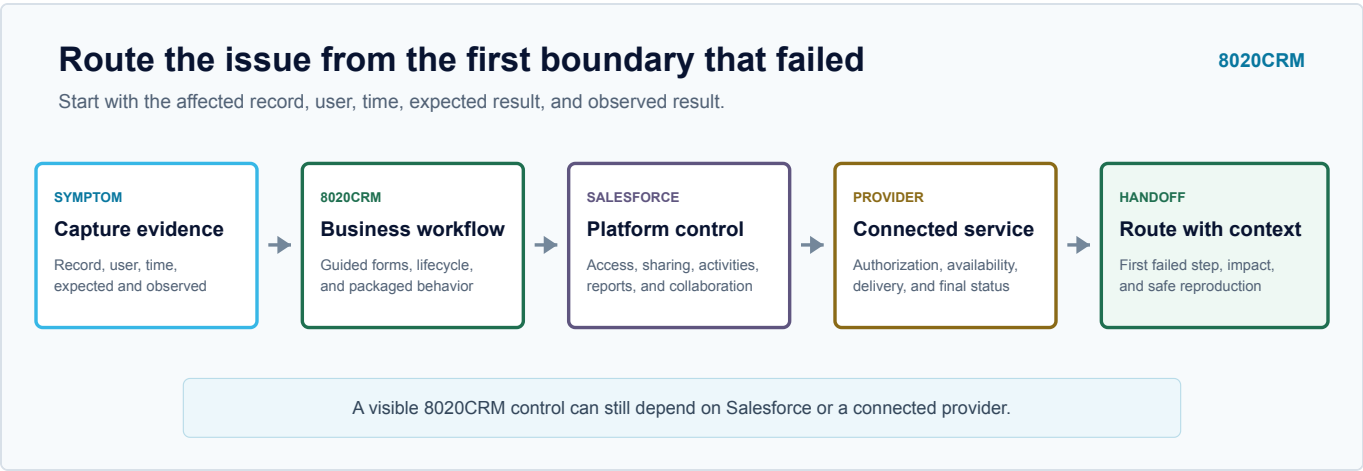
Related guidance

See Action Plans, forms, and files for work records and Financials, commissions, and attribution for financial source records.

REFERENCE

Salesforce platform help and product boundaries

Know when to use 8020CRM guidance, when to use Salesforce Help, and how to diagnose a problem without sending it to the wrong support path.



Route the issue by ownership: 8020CRM workflow, Salesforce platform behavior, or the connected provider involved.

Choose the right source

8020CRM runs on Salesforce, so one user experience can involve both products. Use the 8020CRM guide for customer lifecycles, product workspaces, property and deal records, offers, financials, Action Plans, connected services, and 8020CRM automation. Use Salesforce Help for platform-owned behavior such as Chatter email preferences, Tasks and Events, permission assignment, record sharing, and report-folder sharing.

Start with the symptom, not the assumed owner. Confirm the affected record, user, time, and observed result. Then decide where the first failed boundary sits.

Symptom	Start here
8020CRM action, form, property result, Offer, or deal update is missing	The applicable 8020CRM workflow or troubleshooting article

Symptom	Start here
Chatter post exists but no email notification arrived	Salesforce Chatter organization, user, sender, and email settings
Task or Event exists but appears differently in the timeline	Salesforce Activities and Activity Timeline guidance, then 8020CRM relationship checks
User can open 8020CRM but not a record, field, action, or report	Salesforce access and sharing controls plus the intended 8020CRM role
Report exists but the user cannot find its folder	Salesforce report and dashboard folder sharing
Connected message or data request is pending or failed	The 8020CRM article for that workflow and the configured provider boundary

Use official Salesforce guidance

For Chatter notifications, see Chatter Email Settings and Branding [🔗](#) and Chatter notification troubleshooting [🔗](#). Confirm the post and access before changing notification settings or posting again.

For Tasks, Events, and the timeline, use Activities: Tasks, Events, and Calendars [🔗](#) and Manage Activities with Activity Timeline [🔗](#).

For user access, use Permission Sets [🔗](#), Permissions and Access Settings [🔗](#), and Sharing and Record Access Features [🔗](#). Do not grant broad access merely to test a missing button.

For analytics access, use Report and Dashboard Folders [🔗](#) and Share a Lightning Report or Dashboard Folder [🔗](#).

Confirm the handoff

When raising a case, state what has already been proven. Useful evidence includes the business task, user role, record type, sanitized time, whether the source record exists, whether another equivalent user succeeds, and the first boundary that failed. Do not include credentials, login links, access tokens, message contents, or unnecessary customer data.

Salesforce Help describes platform capabilities, but your organization's licenses, configuration, security model, and release can change what is available. 8020CRM guidance explains how the

product uses those capabilities; it does not override Salesforce access or delivery controls.

Round robin assignment and Salesforce queues

Configure a Salesforce queue and an 8020CRM round robin together, then verify that routed Leads reach the intended person or role.

Salesforce queues and 8020CRM Round Robins perform different parts of one routing chain. The queue receives an eligible Lead. The active Round Robin that matches that queue selects an eligible assignee and writes the user to the configured Lead field.

Before you begin

Use a Salesforce administrator who can manage queues and an 8020CRM administrator who can create and edit Round Robins and Round Robin Assignees. The tester also needs access to Leads and to the selected assignment field.

Decide these items before configuration:

- The queue label and Salesforce **Queue Name** (developer name).
- **Lead** as a supported queue object.
- The users, roles, roles and subordinates, or public groups that belong to the queue.
- The supported Lead field that the Round Robin should assign: **Owner**, **Acquisition Agent**, **Disposition Agent**, or **Real Estate Agent**.
- The intake or assignment path that should place a new Lead in the queue.
- A synthetic Lead and active test users that will not affect production work or reporting.

Salesforce documents the required queue permissions and member types in [Create Queues](#)  and explains queue ownership in [Set Up Queues](#) .

Create or review the Salesforce queue

1. From Salesforce, select the Setup gear, then **Setup**.
2. In **Quick Find**, enter `Queues`, then select **Queues**.
3. Open the intended queue, or select **New** to create one.

4. Enter a durable **Label** and review the generated **Queue Name**. Record the Queue Name exactly; routing receives this developer name, not the queue record ID.
5. Under **Supported Objects**, move **Lead** to the selected list. A queue that does not support Leads cannot own the test Lead.
6. Under **Queue Members**, add the intended users, roles, roles and subordinates, or public groups. Confirm that every resulting user should be able to work this Lead population.
7. Review queue email behavior according to your notification policy, then save.
8. Reopen the queue and verify the Queue Name, **Lead** support, and final membership.

The screenshot shows the 8020CRM Setup interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Queues' and displays the configuration for the 'Lead Intake Queue'. The configuration includes fields for Label, Queue Email, Queue Name, Supported Objects, Queue Description, Created By, and Modified By. The 'Supported Objects' section shows a list of objects: Scheduled SMS, Lead Task, and Lead Prospect. The 'Queue Members' section shows a list of users: Lead Manager and Lead Qualifier, both with the role of Role.

Label	Queue Name
Lead Intake Queue	Lead_Intake_Queue

Supported Objects
Scheduled SMS
Lead Task
Lead Prospect

Name	Type
Lead Manager	Role
Lead Qualifier	Role

Queue-supported objects and members define who can access and own queued work; they do not define rotation eligibility.

Queue membership controls access to and ownership of queued work. It does not automatically create 8020CRM Round Robin Assignee records. Configure and review both populations.

Configure the 8020CRM Round Robin

The Round Robins and Round Robin Assignees tabs are deployed, but they are not part of the standard 8020CRM navigation order. From the App Launcher, select **View All**, then open **Round Robins**, subject to tab and object access. If your organization added **Round Robins** through

navigation personalization or an administrator added it to the app navigation, you can use that visible tab instead.

1. In **Round Robins**, create a record or open the definition intended for the queue.
2. Use the Salesforce queue's exact **Queue Name** as the **Round Robin Name**. The routing process can match the standard record name or the optional **Queue Name** field and tolerates spaces in place of underscores, but an exact developer-name match is the safest configuration. If your page exposes **Queue Name**, populate it with the same exact value.
3. Select **Assignment Field**. The current packaged queue route supports **Owner**, **Acquisition Agent**, **Disposition Agent**, and **Real Estate Agent**. Owner changes Lead ownership; the other supported choices write the selected user to that Lead field. Do not select another displayed value unless your administrator has separately verified automation that writes it.
4. Use **Markets** only as administrative context unless your organization has separate approved automation that reads it. The packaged queue-triggered routing does not use Markets to choose this Round Robin.
5. Leave **Is Active** cleared while members and the intake path are being prepared, then save.

8020CRM

Search

8020CRM Home Tasks Properties Leads Opportunities Property Transactions Contacts Accounts Campaigns Calendar RAIN More

Round Robins

Recently Viewed

0 items - updated a few seconds ago

Import Change Owner Assign Label

New Round Robin

* = Required Information

Information

* Round Robin Name

Assignment Field Owner

Owner Demo User

Markets Available

All Markets Demo Market

Chosen

Is Active

Last Assignee

Cancel Save & New Save

RAIN (2) GetReal Support Chatbar Feed Phone SMS (1) To Do List Notes

Confirm the assignment field, market, active state, owner, and rotation position before adding eligible assignees.

Add eligible assignees

1. Open the saved Round Robin and select **Related**.
2. Find **Round Robin Assignees** and select **New**. If the related list is missing, ask an administrator to review the assigned Round Robin page layout; the delivered layout includes it.
3. Give the assignee record a recognizable name, select the **User**, and confirm that the Salesforce user is active. Do not leave User blank.
4. Select **Is Active** only while that user should receive assignments, then save.
5. Repeat once for each intended recipient. Remove duplicate active assignee records for the same user, review the related list before activation, and deactivate obsolete assignee records rather than deleting operational history.

The assignee's **Is Active** setting and the Salesforce user's active status are separate. Packaged routing filters for active assignee records; administrators must also ensure that each selected User remains active and eligible for the target Lead field.

There is no manual order field. Routing sorts active assignees by **Last Assigned**, oldest first, and blank values come first. Ties between blank or equal values do not provide an administrator-defined sequence. After selection, routing updates that assignee's Last Assigned and Count and the parent Round Robin's Last Assignee and Count. Do not manually edit those operational values to arrange a preferred sequence.

Activate and test the complete path

1. Confirm the queue still supports Leads and has the intended members.
2. Confirm that exactly one active Round Robin can match the queue developer name, the assignment field is one of the supported targets, and at least one distinct assignee record and its Salesforce user are active.
3. Select **Is Active** on the Round Robin and save.
4. Confirm the approved assignment rule, public form, integration, or other intake path is expected to make the new Lead queue-owned. Round Robin routing starts after a Lead save when its owner is a queue and the Lead is not being converted.
5. Create a separate synthetic Lead through that intended intake path. Do not reuse a production Lead or manually skip the step that is supposed to place it in the queue.
6. Wait for the save and routing to complete, then refresh the Lead and Round Robin records.

Verify the outcome

Open the synthetic Lead from **8020CRM > Leads** and confirm the configured assignment field contains the selected active user. If **Owner** is the assignment field, the Lead should no longer be queue-owned. If a role field is selected, verify that role field directly rather than assuming the owner must change.

Then reopen the Round Robin and its related assignee records. Where the assigned layout, list view, or report exposes them, confirm that the parent **Count** and **Last Assignee** advanced and that the selected assignee's **Count** and **Last Assigned** advanced. The Lead field is the source of truth for the current business result; counters only show current rotation health and do not provide a per-assignment audit trail.

For a rotation check, use additional synthetic Leads through the same intake path and confirm the oldest eligible Last Assigned value is selected next. Remove or clearly identify test records according to your test-data policy after validation.

Troubleshooting

Symptom	Check first
Lead never becomes queue-owned	Intended intake path, assignment-rule criteria, queue selection, and whether Lead is a supported queue object
Lead remains in the queue	Active Round Robin, exact queue developer-name match, active assignee records, active Salesforce users, and the selected assignment field
Wrong Round Robin runs	Duplicate or overlapping active names and Queue Name values; keep only the intended definition eligible for that queue
Wrong user is selected	Assignee active states, duplicate assignee records, and Last Assigned values; blank and oldest values are selected first, while ties do not define a manual sequence
Selected assignment field stays blank	Supported Assignment Field choice, populated active User, field access, validation, and other Lead automation
Counters move but the expected Lead field does not	Unsupported target, blank or ineligible User, multiple matching Round Robins, save errors, validation, and later automation; counters alone are not proof of assignment

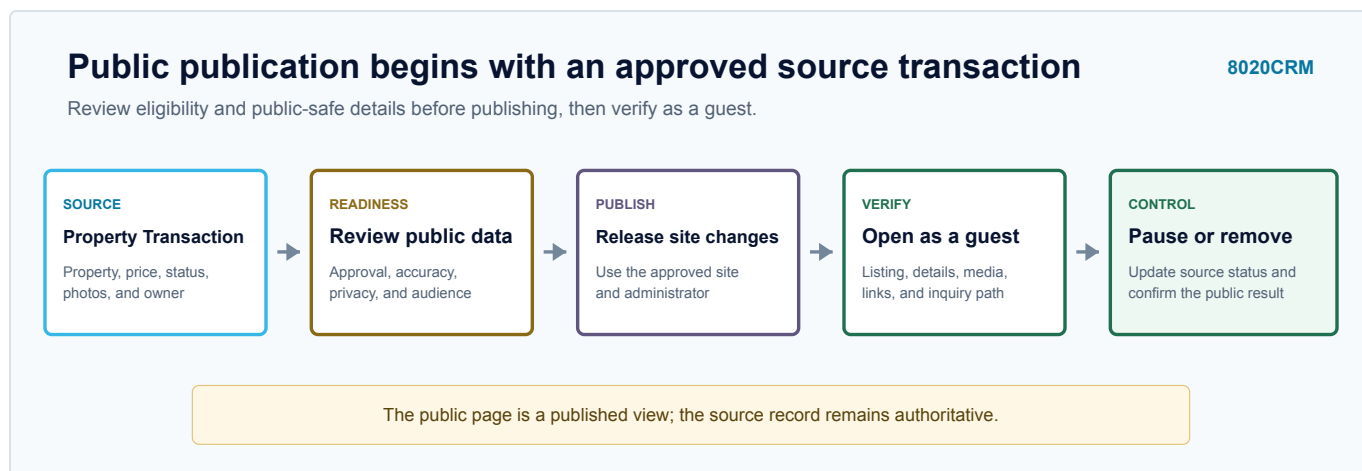
Symptom	Check first
An inactive user is referenced	Deactivate that Round Robin Assignee, select an active replacement, and retest with a new synthetic Lead

After a correction, create one new synthetic Lead through the intended intake path. Do not move the same production Lead in and out of the queue to force repeated routing.

Continue with Lead intake, assignment, and nurture for the user handoff and Troubleshooting and safe recovery when a broader intake process only partially completes.

Prepare and publish the disposition portal

Prepare a Property Transaction for the Experience Cloud disposition portal and verify the public result safely.



Treat record readiness, site publication, public verification, and removal as separate gates in the portal lifecycle.

The Property Transaction controls whether one property is eligible for the 8020CRM disposition portal. Publishing the Experience Cloud site is a separate Salesforce administration task. A ready record does not publish an unpublished site, and publishing the site does not make an incomplete record ready.

Before you begin

The disposition user needs edit access to the intended Property Transaction, its Property, portal fields, pricing, listing details, media, and public contact information. A Salesforce administrator who publishes or changes the site needs Experience Cloud setup and site membership access.

Confirm the approved public site, listing status policy, address-masking policy, media and disclosure approval, public contact, and the person authorized to publish or remove content. Test with a nonproduction or otherwise approved synthetic transaction before first launch.

Prepare the transaction

1. From the App Launcher, open **8020CRM**, then **Property Transactions** and the intended record.
2. If you started from an Opportunity or a disposition workspace, confirm the active Property Transaction and Property before editing.
3. Open the **Dispo** workspace or the configured record action. The delivered update action is labeled **REI Disposition Portal**; a locally configured page can present a shorter label.
4. Review the property heading, listing status and terms, pricing, property facts, showing instructions, approved media, thumbnail, virtual walkthrough, and public contact information.
5. Remove private notes, access codes, internal instructions, and unapproved personal information from public-facing fields and media.
6. Confirm the organization's address-masking choice. Do not infer that a field is private merely because it is not prominent on the internal page.
7. Leave **Ready for Portal** cleared until the public record is complete. Save, reopen the Property Transaction, and review the retained values.
8. Select **Ready for Portal** and save once only after the listing is approved for public display.

The displayed portal link and sent time can update after preparation. Treat them as operational pointers, not proof that an anonymous visitor can reach the listing.

Publish site changes

Record-only changes can appear through an already published site's runtime without a new site design publication. A new or changed Experience Builder page, navigation item, component, theme, or site configuration must be published by an authorized site administrator.

1. From Salesforce Setup, enter **All Sites** in **Quick Find**, then select **All Sites** under Digital Experiences.
2. Open **Builder** for the approved site. Confirm the site name and domain before changing anything.
3. Preview the relevant listing and detail pages in desktop and mobile views.
4. Select **Publish**, enter a useful publication description when prompted, and wait for the publication result.

Salesforce explains the platform process in [Publish Your Experience Builder Site Customizations](#) . Publishing includes all unpublished site changes, so coordinate with other site administrators before confirming it.

Verify public publication

Open the approved public portal in a private browser window so an authenticated Salesforce session does not hide guest-access problems. Locate the listing, open its detail page, and compare its heading, address treatment, status, terms, price, facts, media, and contact details with the approved Property Transaction.

Success requires all three results: the Property Transaction remains ready, the intended listing is discoverable at the public site, and the public detail contains only approved information. Test links and media from the public page rather than from an internal preview.

Pause or remove a listing

Clear **Ready for Portal** or apply the approved ineligible listing status on the Property Transaction, then save and refresh. Recheck the public list and detail URL in a private browser window. Do not delete the Property Transaction to remove a listing, and do not treat the internal save as proof that public access ended.

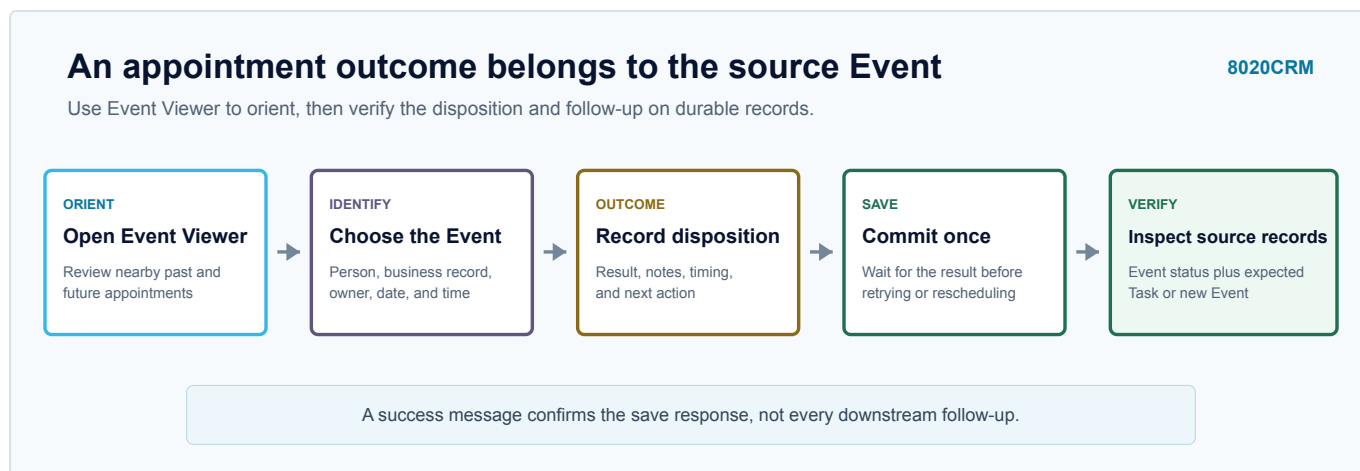
Troubleshooting

Symptom	Check first
Portal action or Dispo workspace is missing	App and page assignment, record type, lifecycle, portal-field access, and user permissions
Transaction is ready but listing is absent	Correct site, ready state, eligible listing status, required public data, record access, guest access, and runtime delay
Listing appears but details are stale	Saved Property Transaction values, selected transaction, cache or publication delay, and whether a site configuration change still needs publishing
Internal preview works but private browser fails	Site publication, domain, guest-user sharing, object and field access, and page visibility
Address or private information is exposed	Clear readiness, verify public removal, then correct the source fields, masking setting, media, and guest access before republishing
Listing remains public after removal	Confirm the correct Property Transaction changed, refresh the public site, check eligibility and listing-status rules, and escalate before deleting records

Administrators should review Salesforce guest-user sharing , Experience Cloud security , and site building guidance  before launch or access changes. Continue with Acquisition and disposition workspaces for deal preparation and Transaction coordination for the accepted outcome.

Appointment dispositions and Event Viewer

Review the nearest past and future appointments, record a disposition, and verify the related record after saving.



Use the focused event view to record an appointment outcome, then verify both the source Event and the resulting follow-up.

Event Viewer is a focused working surface, not a complete calendar or activity history. It shows the nearest past Event and nearest future Event available for the current record context.

Before you begin

You need access to the Opportunity or Property Transaction, its related Events, the Event fields shown by Event Viewer, and any follow-up records the selected outcome creates. Confirm the appointment owner, attendee or person, related business record, time zone, and actual outcome before editing.

Use the Salesforce activity timeline or Calendar when you need every Task and Event. Salesforce explains those platform surfaces in [View Records with Activities](#) and [View Events in Salesforce Calendar](#).

Open the appointment

From the App Launcher, open **8020CRM**, then open the intended Opportunity or Property Transaction. Find **Appts** or **Event Viewer** on the assigned record page. Page labels and placement can vary by app, record type, profile, and device.

The packaged 8020CRM application can also expose **Appointment Dispositions** as a navigation item. Use it only when your role and local process direct you to that broader disposition workspace. An Experience Cloud disposition link is a separate external entry point.

Record the outcome

1. Confirm whether the card is **Last Appointment** or **Next Appointment**, then open the Event link when you need the complete source record.
2. Verify subject, purpose, assigned user, start and end, location, attendee or person, and related business record.
3. For a past appointment, select the actual **Appointment Outcome** and add concise notes or description needed for the next user.
4. When the appointment was cancelled or needs another time, select the requested **Appointment Change Reason**.
5. When rescheduling, enter the new date and time where requested and verify whether a new future Event or follow-up Task is expected by your process.
6. Review any proposed status, offer, agreement, note, or follow-up changes before saving.
7. Select **Save** once and wait for the result. Do not use Delete to represent a cancellation that must remain in history.

Use **New** or **New Appointment** when no suitable future Event exists. Confirm owner, time zone, start and end, attendees, location, reminder, and relationships before saving it.

Verify the result

Open the source Event and confirm its outcome, change reason, rescheduled date when used, owner, person, business record, and notes. Then refresh Event Viewer and the related Opportunity or Property Transaction. Confirm that the appointment status, future Event or follow-up Task, and related business state agree with the outcome.

A success message proves that the requested save returned successfully. The source Event and any expected follow-up records are the durable verification.

Use an external disposition link

Treat an Experience Cloud appointment-disposition link as sensitive. Confirm the appointment identity before submitting, do not forward the URL, submit once, and wait for confirmation. A delivered email, text, or notification proves only that the link was sent. Reopen the related Event in Salesforce to confirm the disposition was saved.

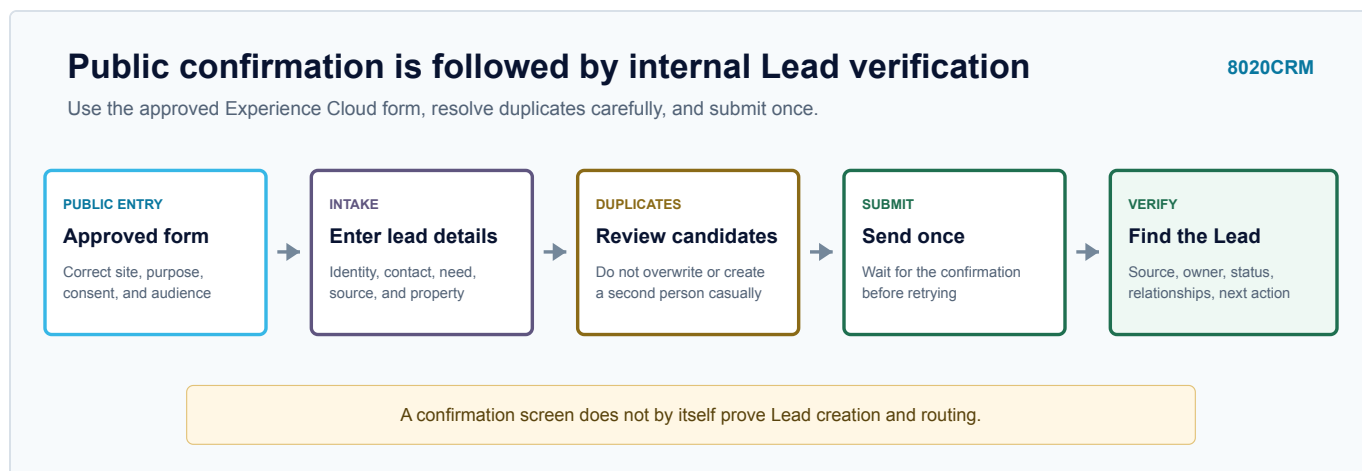
Troubleshooting

Symptom	Check first
Event Viewer is missing	Assigned Lightning page, app, record type, device, component visibility, and Event access
Wrong past or future Event appears	Event date and time zone, person and business-record relationships, cancelled status, and whether a nearer Event exists
Outcome or reason is required	Selected outcome, conditional change reason, rescheduled date, and other visible requirements
Save fails	Event access, owner eligibility, required values, validation, related-record access, and later automation
Reschedule saved but no future appointment exists	Source Event, entered rescheduled date, expected local follow-up behavior, and whether a new Event must be created
Related record status disagrees	Source Event outcome, pending follow-up automation, access, and competing edits; correct the source event before summaries
External link opens but will not submit	Link identity and freshness, site publication, guest access, required fields, and whether the disposition already saved

Continue with Tasks, events, and daily work for calendar work and Activity timeline filters and metrics when the full history or summary is unclear.

Experience Cloud Lead web form

Submit and verify a Lead through the 8020CRM public Experience Cloud intake form without confusing it with standard Salesforce Web-to-Lead.



Public submission begins intake; duplicate review and internal record verification determine how the information is incorporated.

This public intake path runs an 8020CRM Flow on an Experience Cloud page. It can create a Lead or update a selected existing Lead after duplicate review. It is not Salesforce's standard Web-to-Lead feature.

Before you begin

The visitor needs the approved public form URL and the information they are authorized to submit. The Lead operator needs access to Leads, the expected intake fields, queue or owner, and duplicate review. The Salesforce administrator is responsible for the published site, Flow availability, guest access, field access, duplicate policy, abuse controls, and downstream routing.

Before launch or a controlled test, confirm the approved site and domain, privacy notice and consent language, required fields, intended Lead record type and source, duplicate-handling policy, assignment route, and a synthetic test identity that cannot be mistaken for a real customer. Because the public Flow can run with elevated record access, an administrator must explicitly

approve whether an unauthenticated visitor may see any match detail or update an existing Lead. Default to creating a reviewable intake outcome when that authorization has not been established.

Open and submit the form

Visitors open the approved public Lead form from the organization's published link. Do not construct a URL from an internal Salesforce record or reuse an administrator preview URL.

1. Open the public form in a private browser window.
2. Confirm the site branding and purpose before entering information.
3. Enter the contact, property, motivation, financial, source, and comments the person has agreed to provide. Required and visible sections can vary with the selected Lead type and answers.
4. Review name, phone, mobile phone, email, address, source, and record type before continuing.
5. If **Potential Duplicate Leads Found** appears, use only the limited match context approved for public display. Select the intended record and **Edit Selected** only when the visitor is authorized to see that match and update the same relationship; otherwise cancel and route the submission to an authorized Lead operator.
6. Select **Create New** only when the candidate records are genuinely different. Cancel and ask an authorized Lead operator when identity is uncertain.
7. Submit once and wait for the success or error result. Do not refresh or submit again while the outcome is unresolved.

Verify intake in 8020CRM

1. From the App Launcher, open **8020CRM**, then **Leads**.
2. Search by the synthetic contact values and submission time. Review duplicate candidates before deciding the record is missing.
3. Confirm that the selected existing Lead was updated or exactly one new Lead was created.
4. Verify the expected record type, source, unread state, contact values, Property or address context, owner or queue, and latest modified time.
5. If downstream round robin routing is expected, verify the configured assignment field separately. A public success message and a queue owner do not prove assignment finished.
6. Confirm the next accountable Task, Event, or intake action on the resulting Lead.

Success means one intended Lead holds the submitted facts and the approved intake and assignment process has a clear owner. Preserve the test result according to your test-data policy.

Troubleshooting

Symptom	Check first
Public page is unavailable	Approved domain and URL, site publication, page visibility, and site status
Form loads but fields or choices are missing	Active Flow version, guest field access, record types, picklist values, and conditional answers
Duplicate candidate is unexpected	Normalized phone and email, full identity, address, existing Lead status, and duplicate policy
Submission shows an error	Required values, allowed choices, duplicate selection, guest access, validation, and active Flow
Success appears but no Lead is found	Search values, existing Lead update, submission time, record access, duplicate rules, and delayed processing
Lead exists but owner or role field is wrong	Intake assignment path, queue, Round Robin configuration, assignee eligibility, and later automation
Repeated unwanted submissions occur	Pause promotion of the form and review approved anti-abuse, monitoring, and incident controls before reopening

Salesforce Web-to-Lead  is useful platform context, but its generated HTML, limits, and controls do not automatically apply to this custom form. Administrators should also review guest-user sharing  and Experience Cloud security .

Continue with Lead intake workspace for qualification and Round robin assignment and Salesforce queues for downstream routing.

Campaign expenses, statistics, and influence

Record campaign spend, allow campaign statistics to synchronize, and distinguish 8020CRM operational statistics from Salesforce Campaign Influence.

Before you begin

The marketing or finance user needs access to the Campaign, **Add Expense**, Expense fields, the **Expenses** and **Campaign Statistics** related lists, and the applicable Marketing reports. Confirm the Campaign, reporting period, owner, cost policy, category conventions, and whether the amount belongs to this Campaign alone.

An administrator should confirm one approved Campaign Statistics process, report and dashboard access, and the Salesforce Campaign Influence model used by the organization. Do not use a Campaign Statistic row and a Campaign Influence record as interchangeable attribution evidence.

Record campaign spend

From the App Launcher, open **8020CRM**, then **Campaigns** and the intended Campaign. Confirm its name, status, active dates, owner, and audience before selecting **Add Expense**.

The screenshot shows the 8020CRM interface with a modal window titled "Add Expense". The modal is positioned over a campaign page for "Demo Campaign". The modal contains the following fields:

- Amount:** A text input field.
- Date:** A date picker showing "7/22/2026".
- Vendor/Payee:** A search field with the placeholder "Search Accounts..." and a magnifying glass icon.
- Category:** A dropdown menu showing "--None--".
- Sub-Category:** A dropdown menu showing "--None--".
- Memo:** A text area for additional notes.

At the bottom right of the modal are "Cancel" and "Save" buttons. The background page shows campaign details, including "Campaign Members (1)", "Campaign Member Statuses (3)", "Campaign Statistics (3)", and "Expenses (1)".

Amount and date establish the cost; use the optional classification fields consistently so later comparisons retain context.

1. Enter the actual amount and expense date.
2. Complete category, subcategory, vendor or payee, and memo when they apply under the organization's cost policy.
3. Review the Campaign shown by the action. Cancel if it is not the intended initiative or period.
4. Save once and wait for the result.
5. Open the created Expense and confirm the Campaign, amount, date, classification, payee, and memo. Add service start or end dates on the Expense record when your cost policy requires them; those fields are not collected by the delivered Add Expense action.
6. Return to **Campaign > Related > Expenses** and confirm the new Expense appears once.
7. Refresh **Campaign > Related > Campaign Statistics**, then compare the applicable **Reports > Marketing > Campaign Statistics - Expenses** or **Campaign Statistics - Expenses By Date** report with matching filters. A dashboard can retain an older refresh until it is refreshed separately.

Read the results correctly

8020CRM

by Centra

Search...

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⚙️

🔔

👤

8020CRM

Home

Tasks

Properties

Leads

Opportunities

Property Transactions

Contacts

Accounts

Campaigns

Calendar

RAIN

More

Campaign

Demo Campaign

EditDeleteAdd Expense

RelatedDetails

Campaign Members (1)

Add LeadsAdd Contacts

Type	Name	Lead Status	Email
Contact	Demo Contact		demo@example.invalid

View All

Campaign Member Statuses (3)

New

Member Status	Is Default	Responded	Last Modified Date
Received			11/24/2024, 10:38 PM
Responded			11/24/2024, 10:38 PM
Sent			11/24/2024, 10:38 PM

View All

Campaign Statistics (3)

New

Statistic Name	Time to Lead	Time to Opportunity	Time to Appointment
Demo Campaign - Expense - 202...			
Demo Campaign - Expense - 202...			
Demo Campaign - Demo Contact...	0.000	0.007	0.053

View All

Expenses (1)

New

Expense Name	Category	Memo	Vendor/Payee
RAIN (3)	GetReal Support	Chatter Feed	Phone

Activity

📧📱📅📄

Filters: Within 2 months • All activities • All types

RefreshExpand AllView All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

To change what's shown, try changing your filters.

Show All Activities

Review members, outcomes, expenses, and activity together while keeping operational statistics distinct from attribution.

8020CRM Campaign Statistics are operational rows assembled from Campaign responses, Expenses, and deal milestones. Salesforce Campaign Influence is a separate attribution feature that relates Campaigns to Opportunities through an influence model. Do not add the two together as though they were the same measure.

If totals differ, compare detail rows before formulas. Correct the source Expense, Campaign relationship, Campaign Member status, deal relationship, lifecycle event, or date. Wait for normal synchronization and dashboard refresh before comparing again.

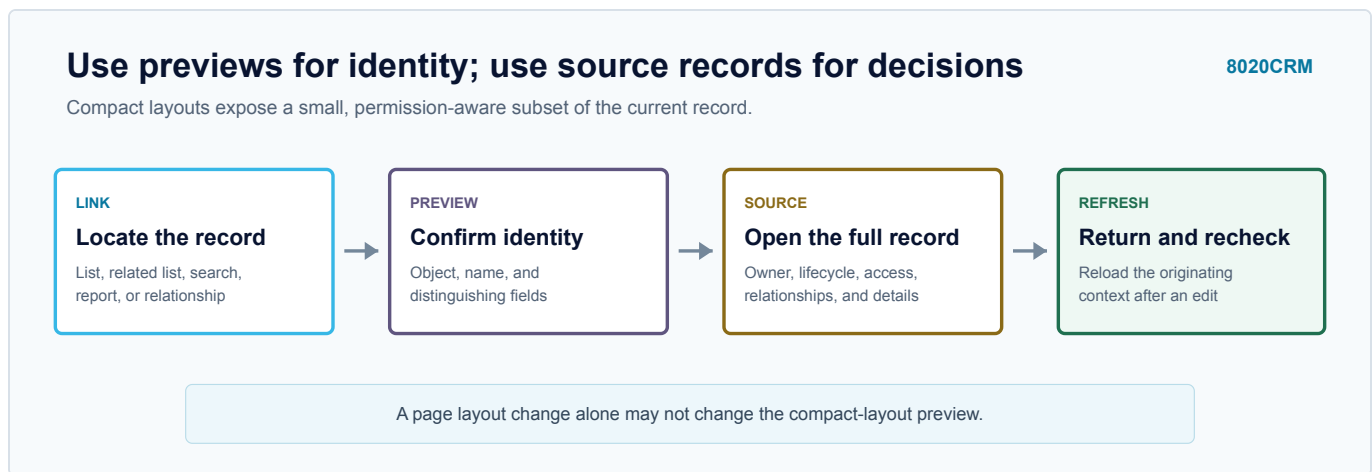
Troubleshooting

Symptom	Check first
Add Expense is missing	Campaign page assignment, action placement, Expense access, field access, and user permissions
Expense saved to the wrong Campaign	Open the Expense, confirm its identity and relationships, and correct it through the approved process instead of duplicating it
Expense total is low or high	Campaign relationship, amount, effective date, category policy, duplicates, deleted records, and report period
Statistic row is missing or stale	Qualifying source event, Campaign relationship, configured synchronization owner or setting, access, report filters, and report or dashboard refresh state
Campaign Influence is absent	Salesforce feature setup, active model, Opportunity-Campaign relationship, Campaign Member or primary Campaign behavior, and access
Two reports disagree	Detail populations, counted unit, date field, lifecycle filters, security context, and refresh time

Do not create a duplicate Expense, change a valid deal stage, or edit a summary merely to force a total. Use Expenses, Campaign Statistics, and marketing performance for the operating model and Reports, dashboards, and operational health for governed analysis.

Record previews for Property, Transaction, Campaign, and Expense

Use Salesforce record previews to confirm identity quickly, then open the source record before making a decision or edit.



Use the preview for orientation, then open the source record when accuracy or fresh data matters.

Before you begin

You need access to the linked record and the fields expected in its preview. A preview is an identity and orientation aid; it is not the authoritative screen for approval, editing, complete financial review, or lifecycle decisions.

Use a preview

1. From an 8020CRM list view, related list, search result, report, or record relationship, locate the linked Property, Property Transaction, Campaign, or Expense.
2. Hover over the link or expand it where Salesforce offers a preview.
3. Confirm the object type, record name, and distinguishing fields.
4. Select the record link to open the source record before editing, approving, or relying on details that are not shown.

5. Verify the current owner, lifecycle, relationships, and complete details on the source record.

Property and Property Transaction use configured 8020CRM compact layouts. Campaign and Expense currently use Salesforce's system compact layout, so their previews can be shorter and can vary with platform or subscriber configuration.

Verify the result

A useful preview identifies the intended object and record without contradicting the current source record. The open record remains the durable source for the decision. Refresh the list or parent record after a source edit before expecting the preview to change.

If a preview is missing or incomplete

1. Confirm that the text is a Salesforce record link and that the object supports a preview in that context and device.
2. Open the record to determine whether the field exists and whether you can read it.
3. Ask an administrator to review field access and the compact layout assigned to that object and record type.
4. After an approved change, refresh or start a fresh session and compare the preview with the source record.

Administrators manage compact layouts from **Setup > Object Manager > [Object] > Compact Layouts**, then review the compact-layout assignment. Salesforce explains the platform behavior in Compact Layouts . A page layout change alone may not change the preview.

Continue with Record pages, tabs, and guided workspaces to choose the authoritative record area and List views, filters, and display to control the working population.

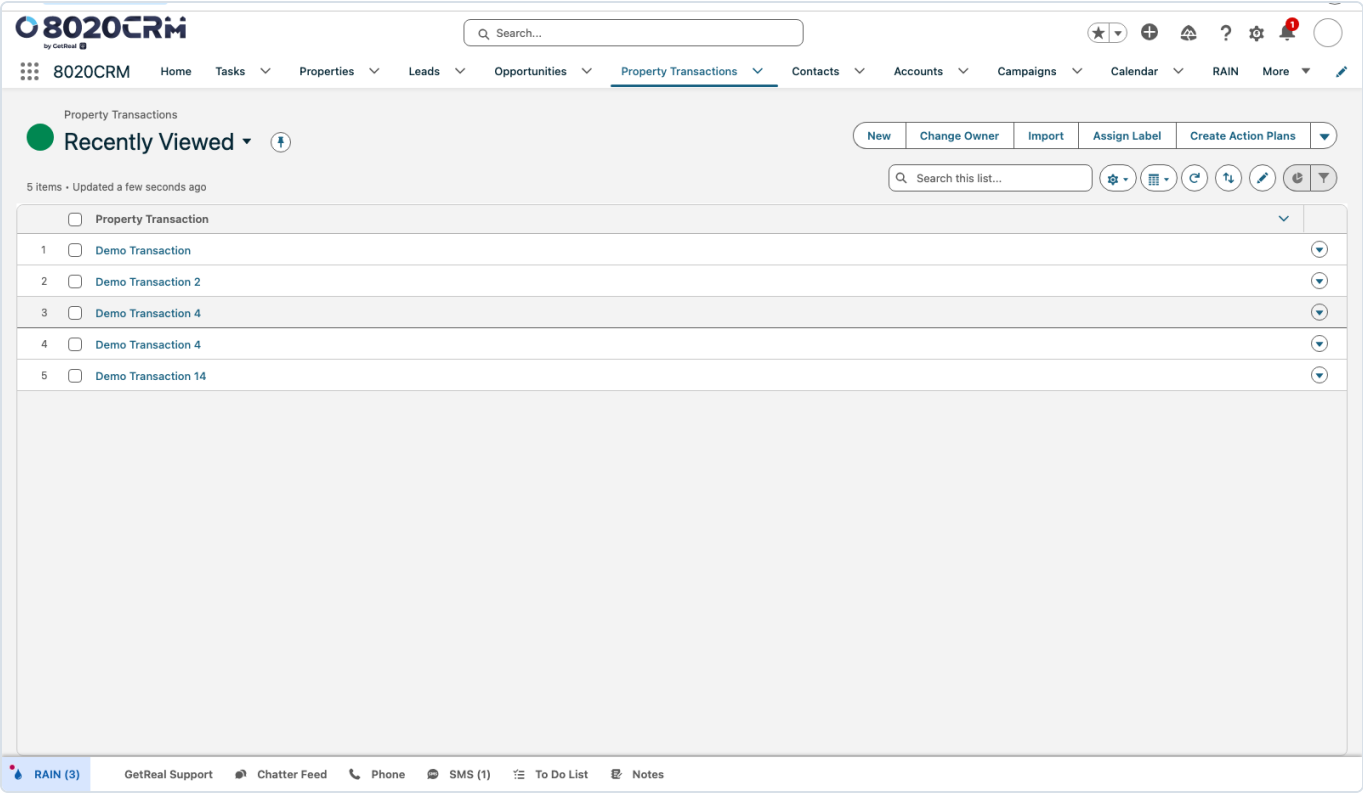
Bulk and record actions

Run Add Campaign to Property, Bulk Skip, Bulk Property Detail, and Create Action Plan with a controlled selection and an observable result.

Before you begin

You need access to the source records, the selected action, every record the action creates or updates, and the connected service or Action Plan feature when applicable. Bulk Skip Trace and Bulk Property Details can consume service credits. Confirm the expected per-record cost, available balance, data purpose, and retry owner before submitting.

Use a narrow list view, refresh it, select the intended rows explicitly, and read the selected count. Bulk Skip Trace, Bulk Property Details, and Create Action Plans require an explicit selection. A configured list-view **Add Campaign to Property** action can instead derive its scope from the entire filtered Property list when no IDs are selected, so confirm the displayed effective count before submitting it. Cancel when the count, object, filters, or records are not exactly what you intend.



Selection determines the scope of the bulk action; confirm the list, filters, and selected rows before creating work.

Choose the correct entry point

Action	User-visible entry	Supported scope
Add to Campaign	8020CRM > Properties > open a Property > Add to Campaign	The delivered record action passes the current Property.
Add Campaign to Property	A configured action on a Property list view	Explicitly selected Properties or, when the action shows no selected IDs, the effective filtered Property list shown for confirmation
Bulk Skip Trace	Open an Account, Contact, Lead, or Property list view; select rows; choose Bulk Skip Trace	Selected rows on the supported object
Bulk Property Details	Open a Lead or Property list view; select rows; choose Bulk Property Details	Selected Leads or Properties
Create Action Plans	Open a supported list view; select rows; choose Create Action Plans	Selected Accounts, Campaigns, Cases, Contacts, Contracts, Leads, Opportunities, or Property Transactions where the action is deployed and visible

An administrator can remove, rename, or reposition an action. A missing action is an access or page/list configuration question, not permission to use a different object or an unreviewed population.

Run the action

Add a Property to a Campaign

1. Open the intended Property and confirm its identity and current Campaign relationships.
2. Select **Add to Campaign**.
3. Select the intended Campaign and review the Property context shown by the guided action.
4. Submit once and wait for the result.

5. Open the Campaign Property relationship from the Property or Campaign and confirm both records. A queued message means processing started, not that every relationship finished.

For a configured Property list-view entry point, first narrow and refresh the list, select the intended Properties when selection is supported, and confirm the **effective** record count reported by the action. If no rows are selected, treat the current filtered list as the possible scope. Submit only when the Campaign, filters, and effective count are correct, then reconcile the resulting relationships against that count.

Run Bulk Skip Trace or Bulk Property Details

1. Open the supported object tab and select a narrow list view.
2. Refresh, select the intended rows, and confirm that each has enough address or identity data for the request.
3. Select the bulk action and review the selected count and available-credit message.
4. Submit once. Keep the success, warning, or error result until you know how many records were accepted.
5. Wait for background work to finish, then sample both successful and unsuccessful source records.
6. Confirm updated detail or contact data, freshness or result fields, and actual service usage. Apply consent and outreach rules before using returned contact information.

Create Action Plans for selected records

1. Open a supported list view, refresh it, and select the intended records.
2. Select **Create Action Plans** and confirm the action reports the same selection.
3. Choose the approved template, plan start or anchor date, and other displayed plan inputs.
4. Submit once and wait for plan creation.
5. Confirm one intended Action Plan per selected source record, then sample generated Tasks for owner, due date, prerequisite, and relationship.

Use Action Plans for template selection and plan execution. A single-record **Create Action Plan** button follows that same verification standard but does not represent a bulk selection.

Verify the batch

Reconcile expected, submitted, succeeded, skipped, and failed counts. Open representative durable records rather than relying only on a toast or redirect. For connected actions, compare credit usage with accepted work. For Action Plans, compare the plan count and generated Tasks with the original selection.

Troubleshooting and recovery

Symptom	Check first
Action is missing	Supported object, explicit selection, list button or record action placement, package access, page or list configuration, and user permissions
Selected count is wrong	Current object and list, filters, stale selection, pagination, and whether all intended rows are explicitly selected
Credits are insufficient	Current balance, expected per-record cost, auto-refresh policy, and whether a smaller approved selection should be used
Only some records succeed	Required address or identity data, record access, provider result, per-record error, and committed successes
Batch is still pending	Background-job state, source-record freshness, service usage, and expected completion interval
Duplicate Campaign relationship or Action Plan appears	Prior submission, existing related records, unique relationship handling, and whether the action was submitted again

Do not click the action again merely because results are not immediate. Identify committed successes and retry only confirmed failures through the supported action. Salesforce explains standard action placement in Quick Actions [🔗](#) and standard list controls in Work with List Views [🔗](#).

Administer the Action Plans app

Use the Action Plans app to manage templates, review generated plans, and control XML template imports.

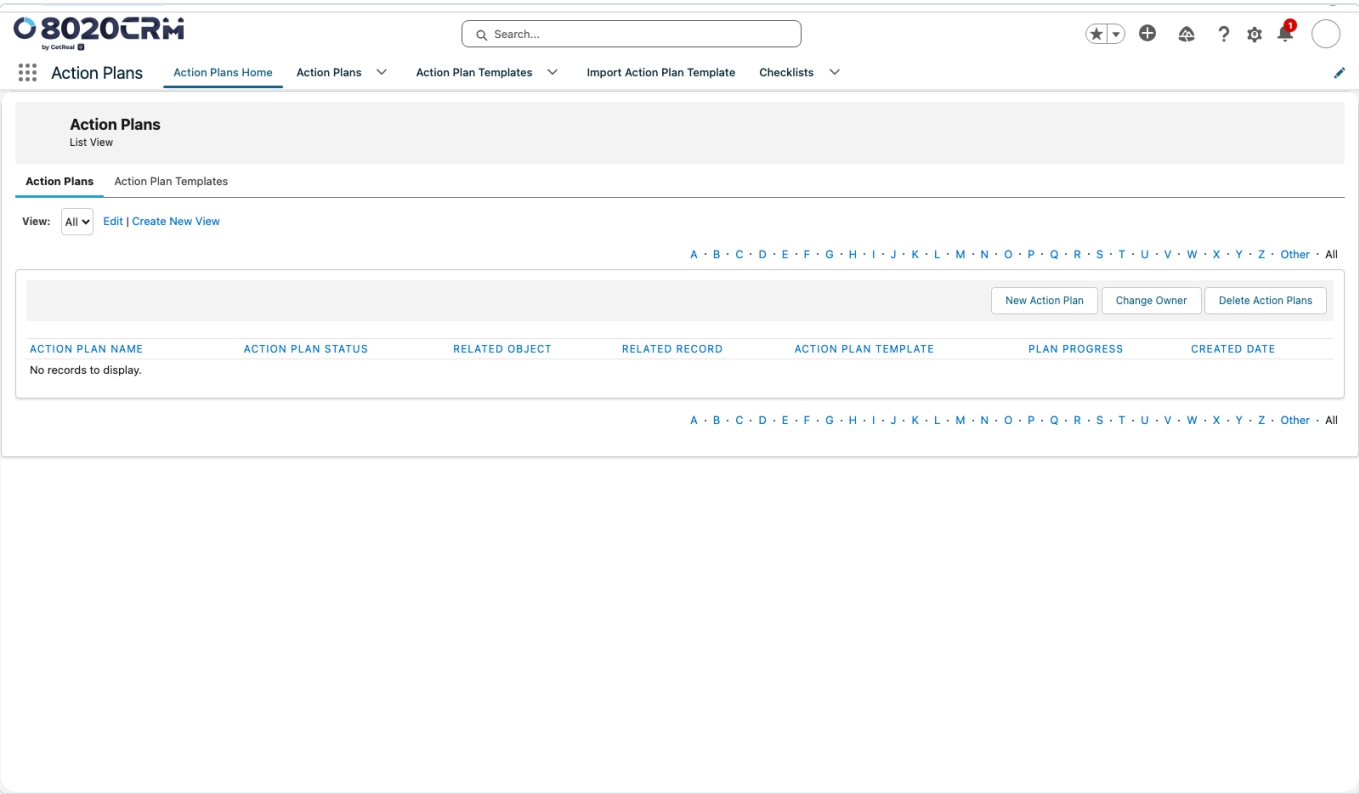
Before you begin

Use an administrator or approved template owner with access to the Action Plans app, Action Plan Templates, template Tasks, Checklists, target objects, Salesforce Tasks, and import feature when used. Choose a representative least-privilege test user and a synthetic target record for every supported process.

Before editing, document the current template, related object, task order, assignment strategy, date rules, trigger criteria, re-entry policy, weekend handling, Task record type, active plans that use it, and rollback owner. Changing a template does not safely repair Tasks already created from an older definition.

Navigate the app

From the App Launcher, select **View All**, then **Action Plans**. The app provides **Action Plans Home**, **Action Plans**, **Action Plan Templates**, **Import Action Plan Template**, and **Checklists** according to tab and object access. Home combines plan and template list views for review.



Use the navigation to separate live plans from reusable templates, imports, and checklist administration.

Create or revise a template

Open **Action Plan Templates**, select **New**, or open an existing subscriber-owned template. Use a new controlled version when an active process must preserve its prior definition.

8020CRM by Outburst

Search...

Action Plans Action Plans Home Action Plans Action Plan Templates Import Action Plan Template Checklists

New Action Plan Template

Action Plan Template

Save Save and New Cancel

Information

Required Information

Action Plan Template Name *

Related Object --None--

Description

Avoid Weekends For Due Dates

Default Weekend Due Dates To --None--

Archived

Re-Entry Criteria Re-enter after exit

Trigger Criteria and Actions

Entry Trigger Field

Entry Trigger Field Value

Exit Trigger Field

Exit Trigger Field Value

Finish Action Field

Finish Action Field Value

Tasks

SUBJECT	DAYS TO COMPLETE	DATE TRIGGER	ASSIGNMENT TYPE	ASSIGNMENT FIELD	ASSIGNED TO	PRIORITY	SEND EMAIL	REMINDER	COMMENTS & LINKS	CHECKLIST
*		Set Date Trigger	Record Owner		Search Users...	Normal		8:00 AM	Add	Add Checklist

Add New Task

Treat each template step as future assigned work: its trigger, timing, owner, reminder, instructions, and checklist should agree.

1. Enter a durable template name, related object, and description.
2. Configure weekend due-date handling and the Task record type when your process uses them.
3. Configure entry, exit, finish, and re-entry behavior only when the business event and recovery path are understood. Test trigger-driven creation separately from manual creation.
4. Add template Tasks in the intended sequence. Every task needs a clear subject; set priority, days to complete or trigger date and offset, reminder, comments, and email behavior as required.
5. Select the assignment strategy: record owner, running user, a specific active user, or an active user from the configured record field. Confirm the target object supplies the chosen field.
6. Add a prerequisite only where work must wait for another plan Task. Review the resulting dependency chain for loops or unreachable work.
7. Select a Checklist template when the generated Task needs an independent working checklist.
8. Save and reopen the template. Confirm the related object, task count, order, assignments, date rules, dependencies, reminders, and checklists.

Test before release

1. Create a synthetic target record with the owners, user fields, dates, and lifecycle values the template expects.
2. Create one Action Plan from the supported record action or allow the controlled entry criterion to create it.
3. Open the generated Action Plan and representative Salesforce Tasks.
4. Confirm related record, template, start date, owners, due dates, priorities, reminders, prerequisites, and cloned Checklists.
5. Complete a prerequisite Task and verify that dependent work becomes available with the expected due date.
6. Test a negative case that should not create or re-enter a plan.
7. Repeat as the least-privilege user, then release the entry point only after both access and behavior are correct.

Archive a template when it should no longer be selected. Preserve active plan and Task history; do not delete a template merely to clean up a list.

Import a template safely

Open **Import Action Plan Template** only for an approved XML file exported by a compatible Action Plans environment. The XML is not a full-fidelity backup or a substitute for a deployment process. Before import, inventory the source template's settings, Tasks, assignments, dates, dependencies, reminders, and Checklists.

Import into a test environment first. After import, open the new template and compare it with that inventory. Review every organization-specific object, field, user, and Checklist reference, then run the same synthetic-record test before use.

The import creates the template, its Tasks, and dependency links in stages. If an error occurs, check **Action Plan Templates** for a partially created template instead of assuming the attempt rolled back. Archive the incomplete template and investigate the displayed failure before retrying.

An import success message proves that a template record was accepted. It does not prove that the imported process is valid for this organization's objects, fields, users, permissions, or lifecycle.

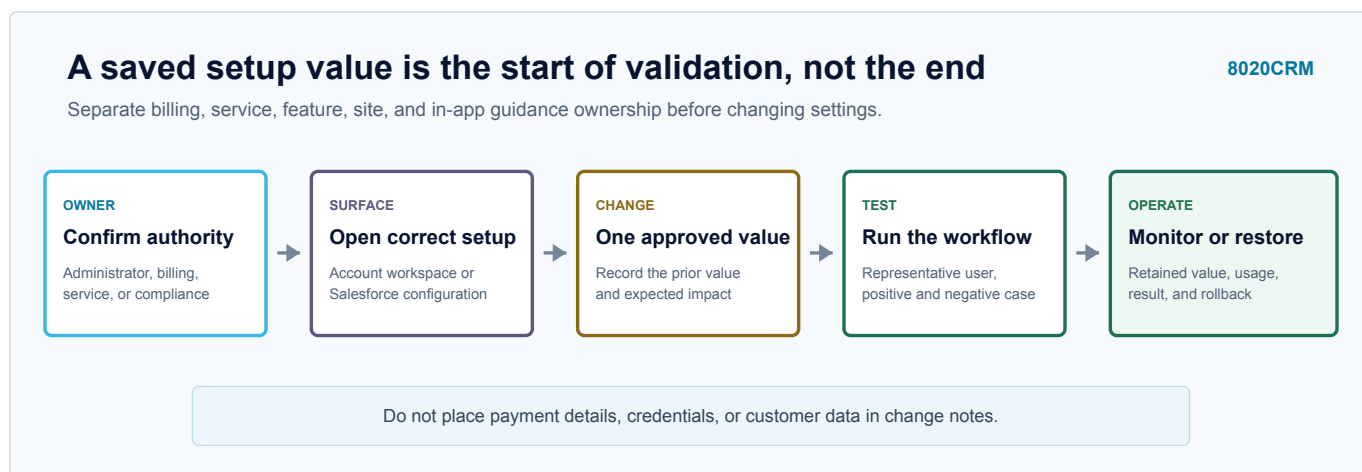
Troubleshooting

Symptom	Check first
Action Plans app or tab is missing	App and tab assignment, package access, object permissions, and user license
Template is unavailable during plan creation	Related object, archive state, target record type, entry point, and user access
Generated owner is blank or wrong	Assignment type, active specific user, record owner, configured user field, and target-record value
Due date is wrong	Start or trigger date, offset, prerequisite completion date, weekend rule, and time zone
Dependent Task never becomes available	Prerequisite relationship, prerequisite Task status, dependency chain, and Task automation
Checklist is missing	Template Checklist relationship, access, clone result, and generated Task relationship
Import fails	Approved export source, XML file, create access, related object and field availability, displayed import error, and any partially created template
Existing plans changed unexpectedly	Source Salesforce Tasks and plan records, later automation, and whether an administrator edited active records rather than only the template

Salesforce also offers Action Plans in some industry products. Its Action Plans administration  is useful conceptually, but product availability and object behavior are not a substitute for this bundled 8020CRM app. Use Action Plans for end-user execution and Bulk and record actions for controlled list creation.

8020CRM setup, GetReal Account, and in-app guidance

Review account and service settings, select the public API site, and maintain org-owned Salesforce in-app guidance.



Treat ownership, access, controlled change, workflow testing, and recovery readiness as one governance cycle.

The 8020CRM account workspace combines service monitoring, purchasing and billing entry points, feature settings, public-site selection, and compliance information. These controls have different owners and risks; access to one tab does not authorize every change.

Before you begin

Use a Salesforce or 8020CRM administrator for feature and site setup, a billing administrator for purchasing and payment changes, and an approved service owner for credit limits and monitoring. Confirm the change request, current value, expected workflow result, test user, rollback owner, and whether the setting can trigger paid or external work.

Do not place payment details, service credentials, access tokens, site identifiers, or customer information in change notes.

Open the account workspace

From the App Launcher, open **8020CRM**, then **GetReal Account**. If it is not in the visible navigation, select **View All** in the App Launcher and search for **GetReal Account**, subject to tab access. A legacy or locally renamed entry can display a different account label; confirm that the page contains the current **API Dashboard**, **RAIN OS Dashboard**, **Products & Services**, **Billing**, and **Setup** tabs before making changes.

Review service balance and alerts

1. Open **API Dashboard**.
2. Review the current balance, low-balance alert, and any configured auto-refresh values.
3. Use **Refresh Credits** before treating a displayed balance as final.
4. Change a limit or auto-refresh value only under the approved purchasing policy. Review the amount and expected charge before confirming.
5. Refresh the page and confirm the retained setting and balance.

Use **RAIN OS Dashboard**, **Products & Services**, or **Billing** only when your role owns that service or commercial task. A successful account or payment response does not prove an 8020CRM workflow is configured for users.

Review Features and Settings

1. Open **Setup > Features & Settings**.
2. Work one section and one approved change at a time. Record the previous value before editing because controls can save as they change.
3. Read the visible label and help text, confirm the affected business workflow, and make the approved change.
4. Refresh the account workspace and confirm the value remains.
5. Run one representative positive test and one relevant negative test in the affected workflow as a normal user.
6. Revert the setting through the same supported control if validation fails, then verify the prior behavior.

Do not enable a fallback, legacy, autonomous, paid, or bulk behavior merely because its switch is available. Confirm its process owner, dependencies, monitoring, and recovery first.

Select the approved public site

1. In the account workspace, open **Setup > Public Sites**.
2. Compare the available Salesforce Sites by domain, purpose, active state, guest boundary, and accountable owner. Do not select a production site by name alone.
3. Confirm the change with the connected-service owner. Saving can synchronize the selected site's HTTPS base domain to the connected service account, so treat this as an external integration change rather than a local display preference.
4. Select the approved active site used for the applicable 8020CRM API services and choose **Save**.
5. Refresh and confirm the same site remains selected.
6. Run one controlled skip-trace or property-detail test appropriate to your licenses and test-data policy.
7. Verify the resulting source record, service usage, and final result; a saved site setting alone does not prove the service path works.

Salesforce guest-user security guidance  applies to this public boundary. Review **Terms & Conditions** through the organization's assigned compliance process.

Maintain in-app guidance

Salesforce In-App Guidance is org-owned platform configuration, separate from the GetReal Account workspace.

1. From Salesforce Setup, enter **In-App Guidance** in **Quick Find**, then open **In-App Guidance**.
2. Create or revise a short prompt at a stable decision point and target only the intended app, page, and audience.
3. Preview the prompt, save it, and test it as a representative target user.
4. Confirm that the prompt opens on the intended page, does not hide required controls, and points to current guidance.
5. Retire or revise the prompt when the label, page, access model, or workflow changes.

Use Salesforce In-App Guidance  for the platform controls. Prompts should orient a user at the moment of work, not replace the complete operational procedure.

Troubleshooting

Symptom	Check first
GetReal Account is missing	App navigation, App Launcher search, tab access, package access, and assigned permissions
Balance or account panel is unavailable	Connected account state, service authorization, user access, network availability, and whether refresh completes
Setting does not remain after refresh	Correct section, save or change result, administrator access, validation, and competing edits
Public site is not selectable	Site active state, supported site type, administrator access, and whether the site is already available to the selector
Service test fails after site selection	Selected domain, guest boundary, service setup, credits, source-record eligibility, and final provider result
Prompt does not appear	Active prompt, app and page target, audience, schedule, user access, dismissal state, and page changes
Prompt blocks or misdirects users	Pause or retire it, correct placement and content, then retest as the target role

Continue with Setup, access, and launch readiness for release validation and Administration, integrations, and data governance for ownership and recurring review.