

Project Success Story



SALES CLOUD IMPLEMENTATION

for **Medousa Developers**,
a luxury real estate developer
in Paphos, Cyprus



1 PROJECT & PROPERTY MANAGEMENT

Appex built two interconnected custom objects, Projects & Properties.

These modules provide full visibility into the relationship between construction projects and the sold units, enabling accurate tracking and preporting.

Also created an Image Gallery custom Lightning component integrated into Properties, enabling sales reps to showcase property visuals directly within Salesforce during client engagements.

2 QUOTATION & CONTRACT AUTOMATIONS

We developed a custom quoting engine tailored to Medousa's complex pricing and payment models. Highlights include:

- Automated quote creation with fixed and custom contract types.
- Approval flows that submit quotes to admin users for validation.
- Custom installment management via a bespoke Installments object, allowing flexible payment schedules and calculations.

3

HUBSPOT MIGRATION

We ensured a seamless transition from HubSpot to Salesforce:

- Migrated all relevant records (Leads, Contacts, Opportunities, and custom fields)
- Created matching Salesforce fields (e.g., Budget, Type of Property, Nationality)
Preserved original HubSpot IDs for traceability
- Cleaned and validated data during the import process to avoid duplicates and inaccuracies

MAILCHIMP & OUTLOOK

4 INTEGRATIONS

- Outlook Integration: Enabled users to sync emails, contacts, and calendar events between Outlook and Salesforce, improving visibility and reducing manual work.
- Mailchimp Integration: Connected Salesforce Leads and Contacts to Mailchimp, enabling targeted email campaigns directly from Medousa's existing marketing platform and keeping communication data in sync.

These integrations ensure the sales and marketing teams work in lockstep, using shared data to drive conversions.

DATA

5 SECURITY & VALIDATION

Given the sensitive nature of Medousa's client and property data, we implemented a multi-layered security approach:

- Validation rules to prevent incomplete or inconsistent data entries
- A change request process for users who need to update restricted fields
- File download restrictions to ensure only admin-level users can access or export key files, such as contracts or property documents
- Custom Apex controllers and Lightning components to enforce security dynamically in the UI

THE RESULT?

The client went live with a fully operational CRM tailored to their needs without missing any data from their previous system.

By smoothly transitioning to Salesforce, processes are now more automated, interconnected and secure.