A CRM Application to Handle the Clients and their property Related Requirements

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Project Abstract

Our World Properties integrates Salesforce to streamline customer interactions. Website engagement triggers automated record creation in Salesforce, capturing customer details and preferences. Salesforce categorizes users as approved or non-approved, offering tailored property selections to approved users. This enhances user experience and efficiency, providing personalized recommendations and broader listings. Seamless integration optimizes operations, improving customer engagement and facilitating growth in the real estate market.

INDEX Page

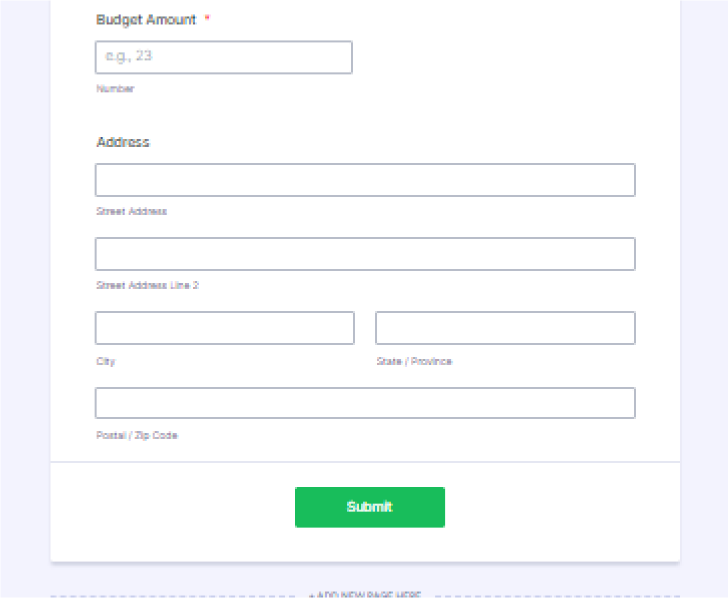
INTRODUCTION

Our World Properties has integrated Salesforce to enhance customer interactions and streamline its real estate operations. Through this integration, website engagement is seamlessly connected to Salesforce, where customer details and preferences are automatically captured. Salesforce then intelligently categorizes users into approved and non-approved segments, offering approved users personalized property recommendations while providing broader listings for others. This strategic use of Salesforce not only improves operational efficiency but also delivers a more personalized and engaging experience for customers, helping Dreams World Properties stay competitive and drive growth in the real estate market.

Task 1

Milestone 1 :- Create a Jotform and integrate it with the org to create a record of customers automatically.

Client wants a form for the customers to get the details directly into the salesforce so that the admins can create a user in the org.



Budget Amount *

e.g., 23

Number

Address

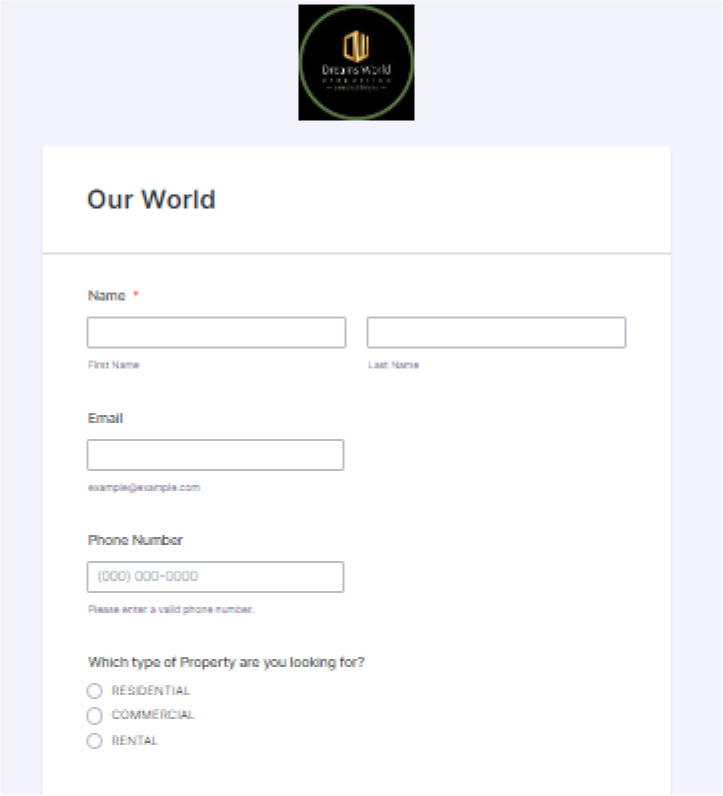
Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code



Our World

Name *

First Name

Last Name

Email

example@example.com

Phone Number

(000) 000-0000

Please enter a valid phone number.

Which type of Property are you looking for?

○ RESIDENTIAL
○ COMMERCIAL
○ RENTAL

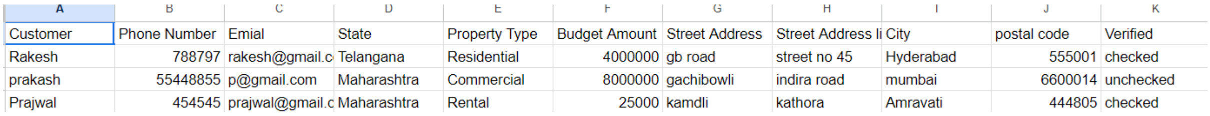
Published link: https://form.jotform.com/242790855703059

Task 2

Create Objects from Spreadsheet.

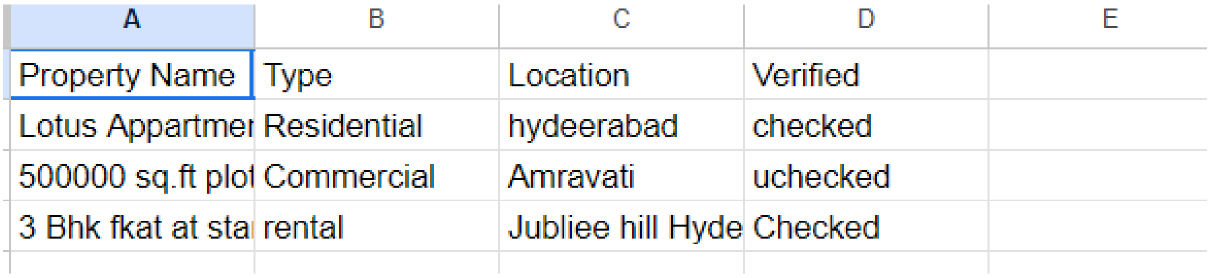
Customer and Property Tables are created by using sample data.

1. For Customer



A	B	C	D	E	F	G	H	I	J	K
Customer	Phone Number	Emial	State	Property Type	Budget Amount	Street Address	Street Address li	City	postal code	Verified
Rakesh	788797	rakesh@gmail.c	Telangana	Residential	4000000	gb road	street no 45	Hyderabad	555001	checked
prakash	55448855	p@gmail.com	Maharashtra	Commercial	8000000	gachibowli	indira road	mumbai	6600014	unchecked
Prajwal	454545	prajwal@gmail.c	Maharashtra	Rental	25000	kamdli	kathora	Amravati	444805	checked

2.For Property



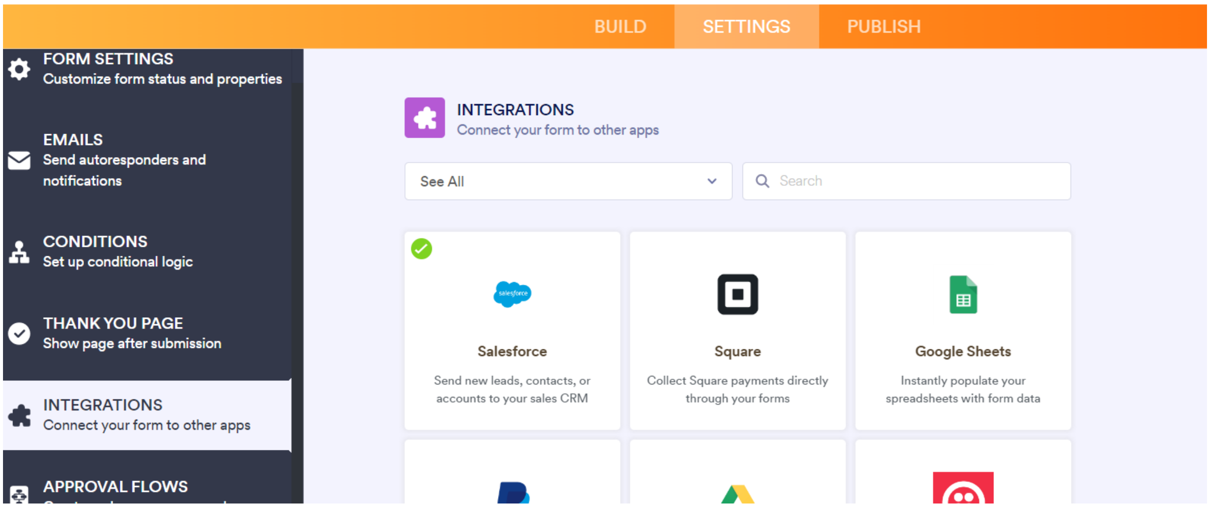
Property Name	Type	Location	Verified
Lotus Appartmer	Residential	hydeerabad	checked
500000 sq.ft plot	Commercial	Amravati	uchecked
3 Bhk fkat at sta	rental	Jubliee hill Hyde	Checked

Task 3

Integrate JotForm with Salesforce Platform

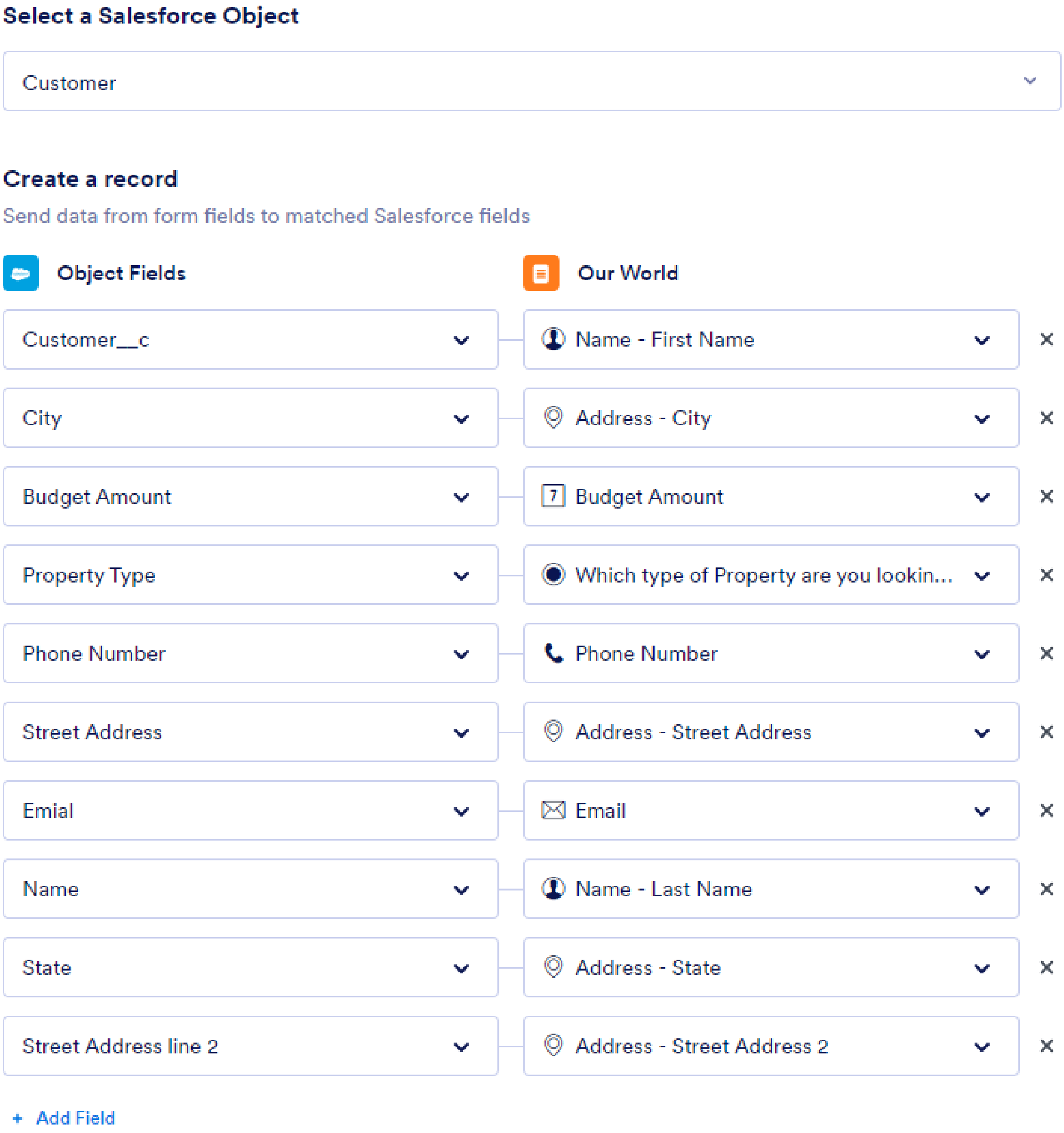
In this Milestone we are going to integrate JotForm with Salesforce.

1. On JotForm, we are integrated with salesforce org.



2. Select an Action - Create a record.

Select a Salesforce Object : - Customer



Select a Salesforce Object

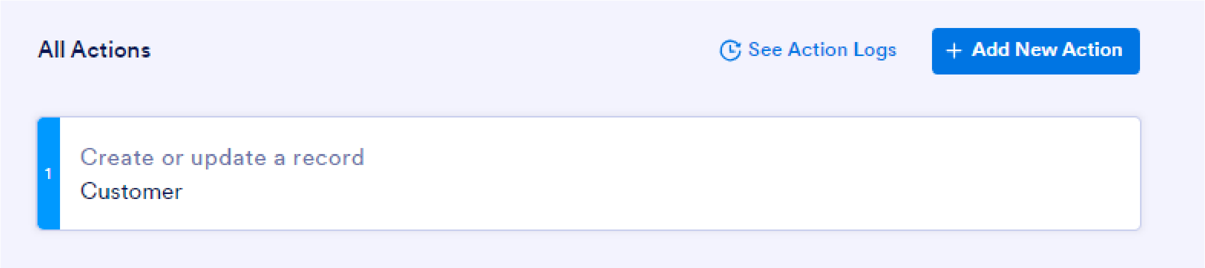
Customer

Create a record

Send data from form fields to matched Salesforce fields

Object Fields	Our World
Customer__c	Name - First Name
City	Address - City
Budget Amount	Budget Amount
Property Type	Which type of Property are you lookin...
Phone Number	Phone Number
Street Address	Address - Street Address
Emial	Email
Name	Name - Last Name
State	Address - State
Street Address line 2	Address - Street Address 2

3. Saving the Integration



Create or update a record

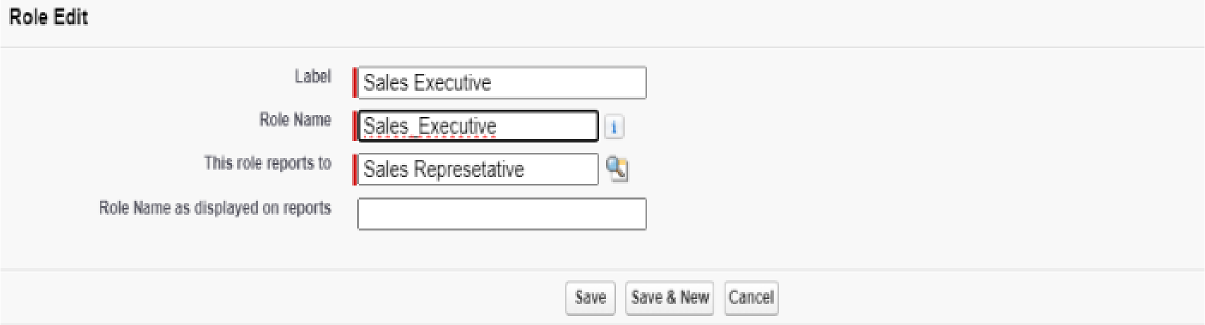
Customer

Task 4

Create Roles

1. Create “Sales Executive” Role which reports to “Sales Representative”

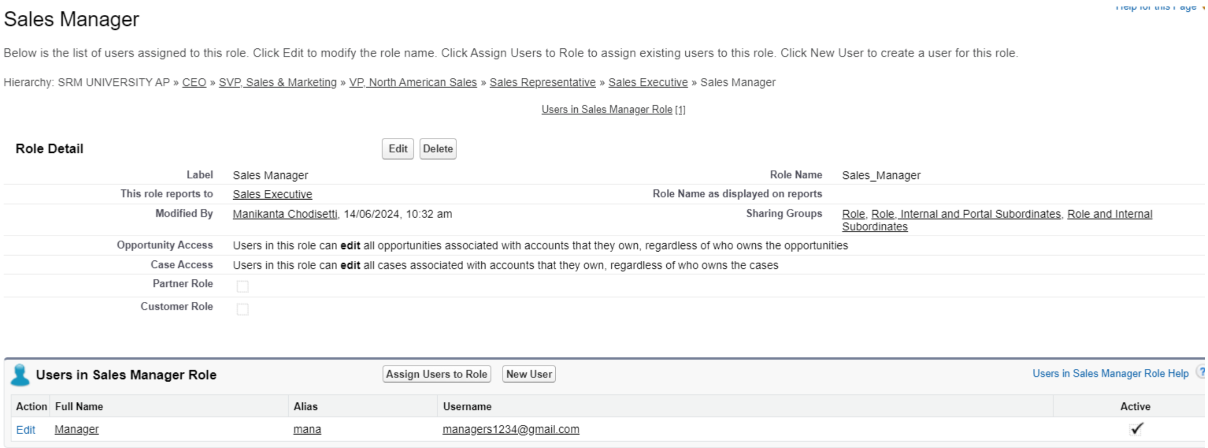
Add Role
Sales Representative Edit | Del | Assign
Add Role
Sales Executive Edit | Del | Assign
Add Role
Sales Manager Edit | Del | Assign
Add Role
Customer Edit | Del | Assign
Add Role



Role Edit

Label	Sales Executive
Role Name	Sales_Executive
This role reports to	Sales Represetative
Role Name as displayed on reports	

2. Similarly Create a Role Name “Sales Manager” below Sales Executive which reports to Sales Executive, Also Add a Role below Sales Manager labeled as “Customer” which reports to Sales Manager.



Sales Manager

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: SRM UNIVERSITY AP » CEO » SVP, Sales & Marketing » VP, North American Sales » Sales Representative » Sales Executive » Sales Manager

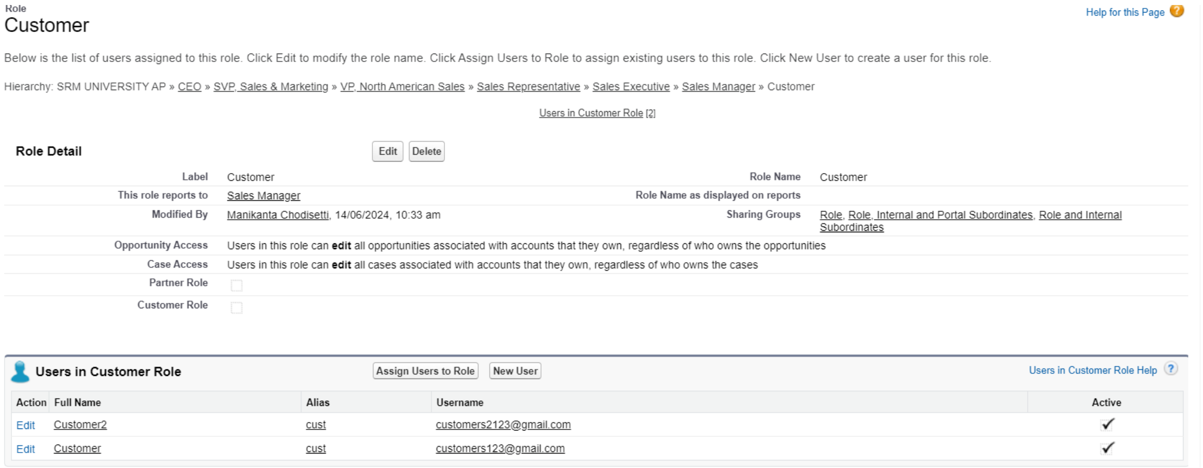
Users in Sales Manager Role [1]

Role Detail

Label	Sales Manager	Role Name	Sales_Manager
This role reports to	Sales Executive	Role Name as displayed on reports	
Modified By	Manikanta Chodisetti, 14/06/2024, 10:32 am	Sharing Groups	Role, Role, Internal and Portal Subordinates, Role and Internal Subordinates
Opportunity Access	Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases		
Partner Role	☐		
Customer Role	☐		

Users in Sales Manager Role

Action	Full Name	Alias	Username	Active
Edit	Manager	mana	managers1234@gmail.com	✓



Customer

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: SRM UNIVERSITY AP » CEO » SVP, Sales & Marketing » VP, North American Sales » Sales Representative » Sales Executive » Sales Manager » Customer

Role Detail

Label	Customer	**Role Name**	Customer
This role reports to	Sales Manager	**Role Name as displayed on reports**	
Modified By	Manikanta Chodisetti, 14/06/2024, 10:33 am	**Sharing Groups**	Role, Role, Internal and Portal Subordinates, Role and Internal Subordinates
Opportunity Access	Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases		
Partner Role	☐		
Customer Role	☐		

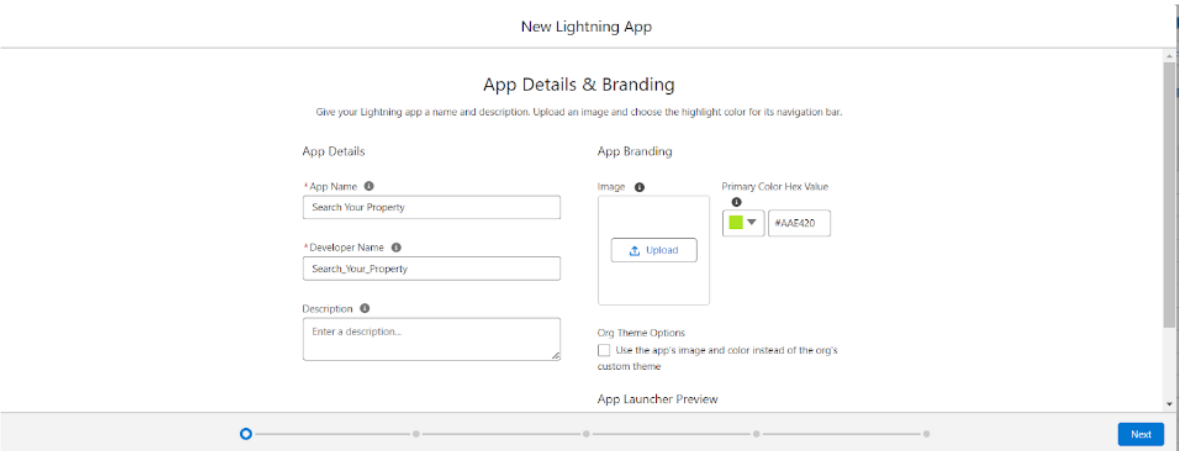
Users in Customer Role

Action	Full Name	Alias	Username	Active
Edit	Customer2	cust	customers2123@gmail.com	✓
Edit	Customer	cust	customers123@gmail.com	✓

Task 5

Create a Property Details App

From Setup>> Go to App Manager and click on New Lightning App and Name it as “Property Details” and add “Customer” and “Property” Object and Save it.



New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name: Search Your Property

*Developer Name: Search_Your_Property

Description: Enter a description...

App Branding

Image

Primary Color Hex Value: 🟩 #AAE420

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

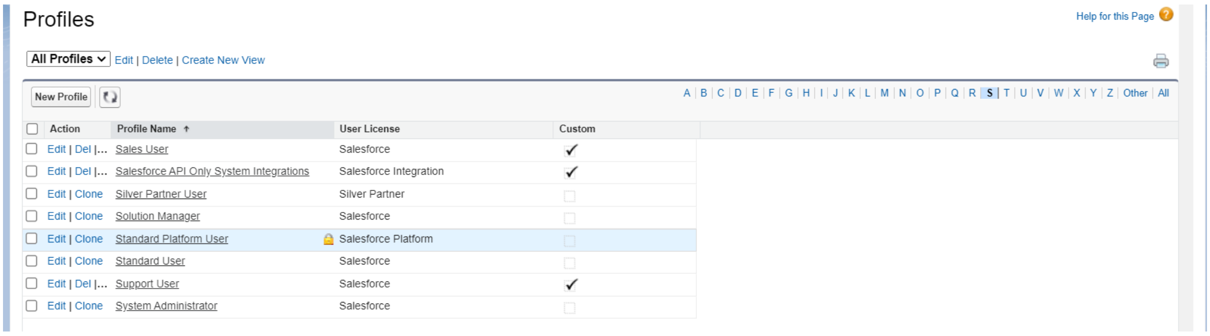
App Launcher Preview

Task 6

Create Profiles

1. Customer:

A. From Setup? Go to Profiles and Clone Salesforce Platform User and Name it “Customer”.



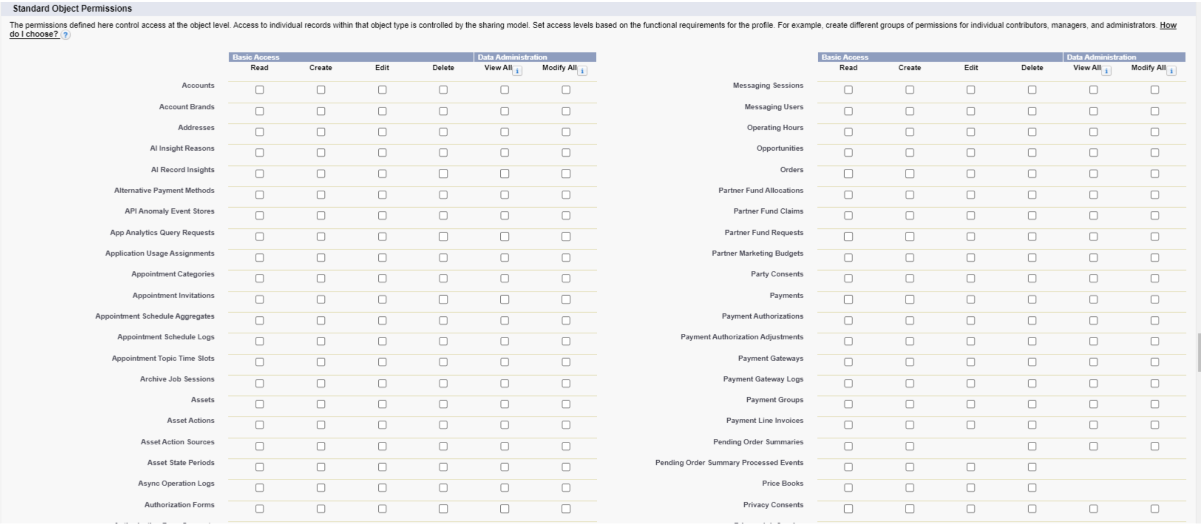
☐	Action	Profile Name ↑	User License	Custom
☐	Edit | Del |...	Sales User	Salesforce	✓
☐	Edit | Del |...	Salesforce API Only System Integrations	Salesforce Integration	✓
☐	Edit | Clone	Silver Partner User	Silver Partner	☐
☐	Edit | Clone	Solution Manager	Salesforce	☐
☐	Edit | Clone	Standard Platform User	Salesforce Platform	☐
☐	Edit | Clone	Standard User	Salesforce	☐
☐	Edit | Del |...	Support User	Salesforce	✓
☐	Edit | Clone	System Administrator	Salesforce	☐

B. Uncheck all the Custom Objects and Check only Property Details From Custom App Settings.

Custom App Settings

= Required Information	Visible	Default
All Tabs (standard__AllTabSet)	☐	○
Analytics Studio (standard__Insights)	☐	○
App Launcher (standard__AppLauncher)	☐	○
Automation (standard__FlowsApp)	☐	○
Bolt Solutions (standard__LightningBolt)	☐	○
Community (standard__Community)	☐	○
Content (standard__Content)	☐	○
Data Manager (standard__DataManager)	☐	○
Digital Experiences (standard__SalesforceCMS)	☐	○
Hive App (Hive_App)	☐	○
Lightning Usage App (standard__LightningInstrumentation)	☐	○
Marketing CRM Classic (standard__Marketing)	☐	○
Property Details (Property_Details)	☑	○
Queue Management (standard__QueueManagement)	☐	○
Sales (standard__LightningSales)	☐	○
Sales (standard__Sales)	☑	●
Sales Console (standard__LightningSalesConsole)	☐	○
Salesforce Chatter (standard__Chatter)	☐	○
Salesforce Scheduler Setup (standard__LightningScheduler)	☐	○
Sample Console (standard__ServiceConsole)	☐	○
Service (standard__Service)	☐	○
Service Console (standard__LightningService)	☐	○
Site.com (standard__Sites)	☐	○
Trailblazer (Trailblazer)	☐	○
WDC (standard__Work)	☐	○

C. Also Remove all the Standard Object Permissions. Uncheck all the Custom Object Permissions and check read and view all in "Property".

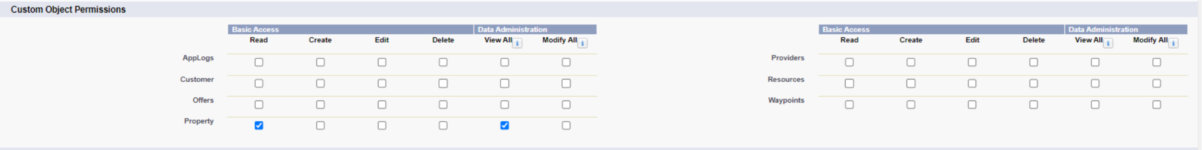


Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. How do I choose?

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	☐	☐	☐	☐	☐	☐
Account Brands	☐	☐	☐	☐	☐	☐
Addresses	☐	☐	☐	☐	☐	☐
AI Insight Reasons	☐	☐	☐	☐	☐	☐
AI Record Insights	☐	☐	☐	☐	☐	☐
Alternative Payment Methods	☐	☐	☐	☐	☐	☐
API Anomaly Event Stores	☐	☐	☐	☐	☐	☐
App Analytics Query Requests	☐	☐	☐	☐	☐	☐
Application Usage Assignments	☐	☐	☐	☐	☐	☐
Appointment Categories	☐	☐	☐	☐	☐	☐
Appointment Invitations	☐	☐	☐	☐	☐	☐
Appointment Schedule Aggregates	☐	☐	☐	☐	☐	☐
Appointment Schedule Logs	☐	☐	☐	☐	☐	☐
Appointment Topic Time Slots	☐	☐	☐	☐	☐	☐
Archive Job Sessions	☐	☐	☐	☐	☐	☐
Assets	☐	☐	☐	☐	☐	☐
Asset Actions	☐	☐	☐	☐	☐	☐
Asset Action Sources	☐	☐	☐	☐	☐	☐
Asset State Periods	☐	☐	☐	☐	☐	☐
Async Operation Logs	☐	☐	☐	☐	☐	☐
Authorization Forms	☐	☐	☐	☐	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Messaging Sessions	☐	☐	☐	☐	☐	☐
Messaging Users	☐	☐	☐	☐	☐	☐
Operating Hours	☐	☐	☐	☐	☐	☐
Opportunities	☐	☐	☐	☐	☐	☐
Orders	☐	☐	☐	☐	☐	☐
Partner Fund Allocations	☐	☐	☐	☐	☐	☐
Partner Fund Claims	☐	☐	☐	☐	☐	☐
Partner Fund Requests	☐	☐	☐	☐	☐	☐
Partner Marketing Budgets	☐	☐	☐	☐	☐	☐
Party Consents	☐	☐	☐	☐	☐	☐
Payments	☐	☐	☐	☐	☐	☐
Payment Authorizations	☐	☐	☐	☐	☐	☐
Payment Authorization Adjustments	☐	☐	☐	☐	☐	☐
Payment Gateways	☐	☐	☐	☐	☐	☐
Payment Gateway Logs	☐	☐	☐	☐	☐	☐
Payment Groups	☐	☐	☐	☐	☐	☐
Payment Line Invoices	☐	☐	☐	☐	☐	☐
Pending Order Summaries	☐	☐		☐	☐	☐
Pending Order Summary Processed Events	☐	☐	☐	☐		
Price Books	☐	☐	☐	☐		
Privacy Consents	☐	☐	☐	☐	☐	☐



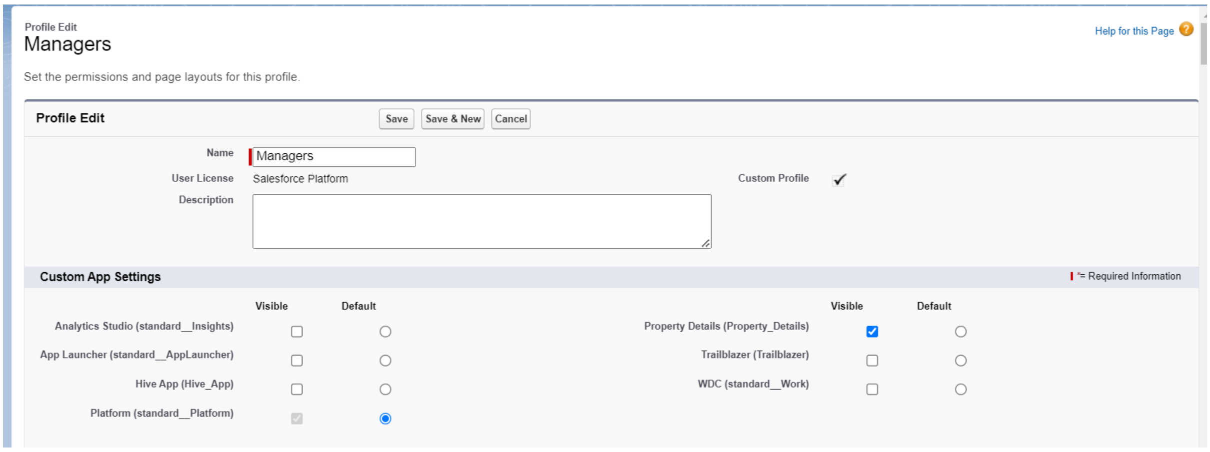
Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
AppLogs	☐	☐	☐	☐	☐	☐
Customer	☐	☐	☐	☐	☐	☐
Offers	☐	☐	☐	☐	☐	☐
Property	☑	☐	☐	☐	☑	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Providers	☐	☐	☐	☐	☐	☐
Resources	☐	☐	☐	☐	☐	☐
Waypoints	☐	☐	☐	☐	☐	☐

2. Property:

a. From Setup >> Go to Profiles and Clone Salesforce Platform User and Name it “Manager”.



Profile Edit
Managers

Set the permissions and page layouts for this profile.

Profile Edit

Name: Managers
User License: Salesforce Platform
Custom Profile: ✓
Description:

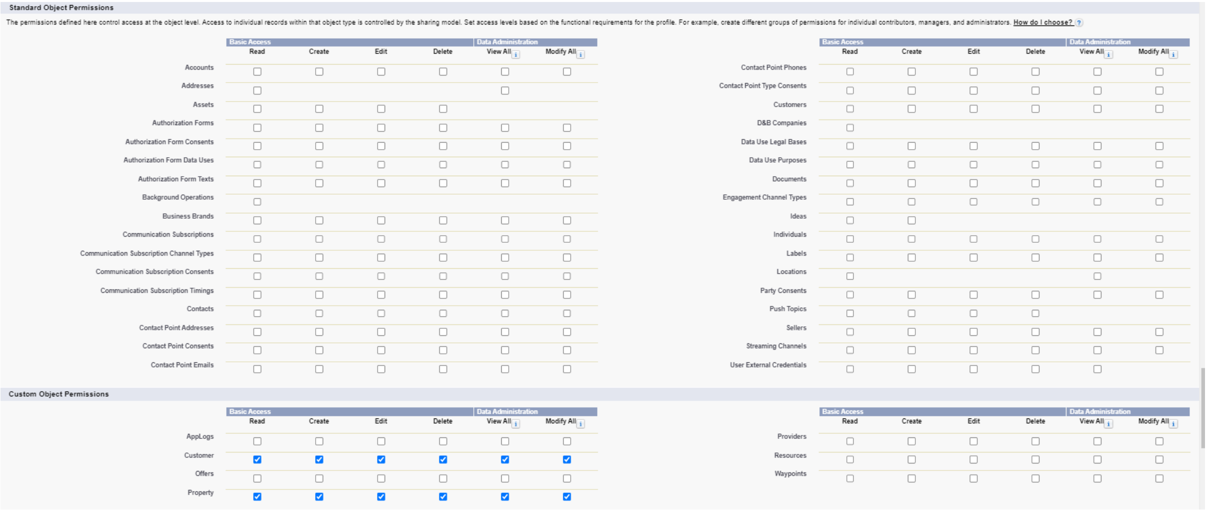
Custom App Settings

= Required Information

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	☐	○	Property Details (Property_Details)	☑	○
App Launcher (standard__AppLauncher)	☐	○	Trailblazer (Trailblazer)	☐	○
Hive App (Hive_App)	☐	○	WDC (standard__Work)	☐	○
Platform (standard__Platform)	☑	●			

b. Uncheck all the Custom Objects and Check only Property Details From Custom App Settings.

c. Also Remove all the Standard Object Permissions. Uncheck all the Custom Object Permissions and check only “modify all” from “Property” and “Customer”.



Standard Object Permissions

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	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	☐	☐	☐	☐	☐	☐
Addresses	☐				☐	
Assets	☐	☐	☐	☐		
Authorization Forms	☐	☐	☐	☐	☐	☐
Authorization Form Consents	☐	☐	☐	☐	☐	☐
Authorization Form Data Uses	☐	☐	☐	☐	☐	☐
Authorization Form Texts	☐	☐	☐	☐	☐	☐
Background Operations	☐					
Business Brands	☐	☐	☐	☐	☐	☐
Communication Subscriptions	☐	☐	☐	☐	☐	☐
Communication Subscription Channel Types	☐	☐	☐	☐	☐	☐
Communication Subscription Consents	☐	☐	☐	☐	☐	☐
Communication Subscription Timings	☐	☐	☐	☐	☐	☐
Contacts	☐	☐	☐	☐	☐	☐
Contact Point Addresses	☐	☐	☐	☐	☐	☐
Contact Point Consents	☐	☐	☐	☐	☐	☐
Contact Point Emails	☐	☐	☐	☐	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Contact Point Phones	☐	☐	☐	☐	☐	☐
Contact Point Type Consents	☐	☐	☐	☐	☐	☐
Customers	☐	☐	☐	☐	☐	☐
D&B Companies	☐					
Data Use Legal Bases	☐	☐	☐	☐	☐	☐
Data Use Purposes	☐	☐	☐	☐	☐	☐
Documents	☐	☐	☐	☐	☐	☐
Engagement Channel Types	☐	☐	☐	☐	☐	☐
Ideas	☐	☐				
Individuals	☐	☐	☐	☐	☐	☐
Labels	☐	☐	☐	☐	☐	☐
Locations	☐				☐	
Party Consents	☐	☐	☐	☐	☐	☐
Push Topics	☐	☐	☐	☐		
Sellers	☐	☐	☐	☐	☐	☐
Streaming Channels	☐	☐	☐	☐	☐	☐
User External Credentials	☐	☐	☐	☐	☐	

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
AppLogs	☐	☐	☐	☐	☐	☐
Customer	☑	☑	☑	☑	☑	☑
Offers	☐	☐	☐	☐	☐	☐
Property	☑	☑	☑	☑	☑	☑

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Providers	☐	☐	☐	☐	☐	☐
Resources	☐	☐	☐	☐	☐	☐
Waypoints	☐	☐	☐	☐	☐	☐

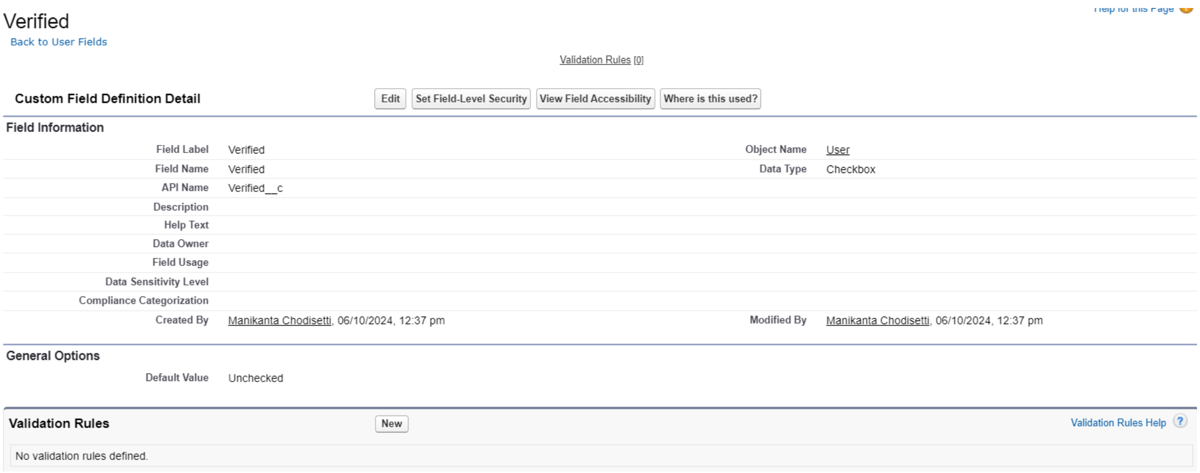
Task 7

Create a Check Box field on user

Create Field on the User as per the business requirement.

a. Setup >> Object Manager >> Search for User >> Fields and Relationships

b. Create new Field Named as “Verified” as Data type “Check Box”



Help for this Page

Verified

Back to User Fields

Validation Rules [0]

Custom Field Definition Detail

Field Information

Field Label	Verified	**Object Name**	User
Field Name	Verified	**Data Type**	Checkbox
API Name	Verified__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Manikanta Chodisetti, 06/10/2024, 12:37 pm	**Modified By**	Manikanta Chodisetti, 06/10/2024, 12:37 pm

General Options

Default Value	Unchecked

Validation Rules

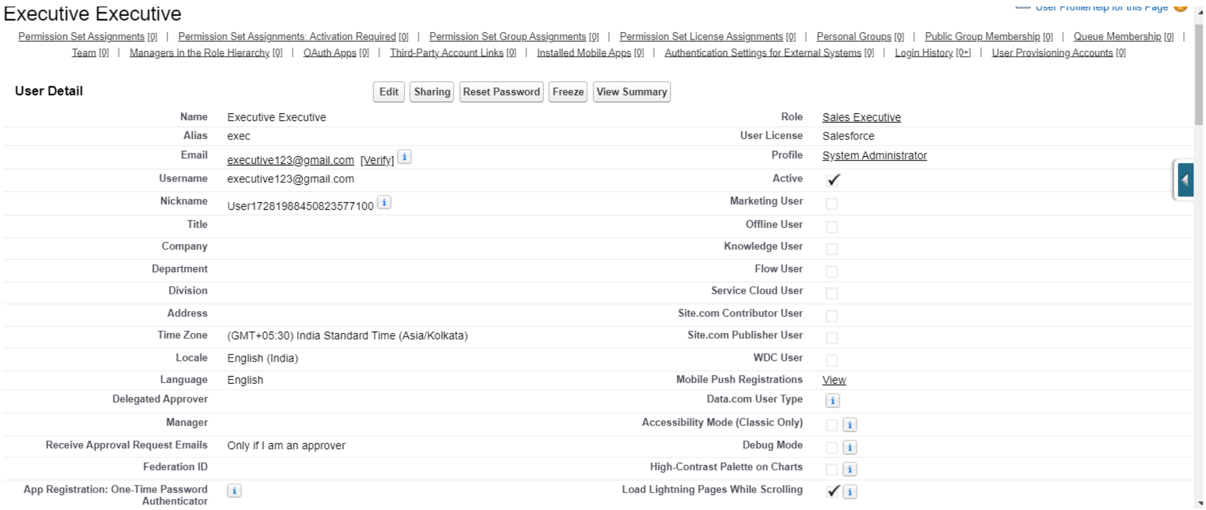
No validation rules defined.

Task 8

Create Users

Create three different users with three different Roles and profiles as we have mentioned above.

1. User-1 Executive

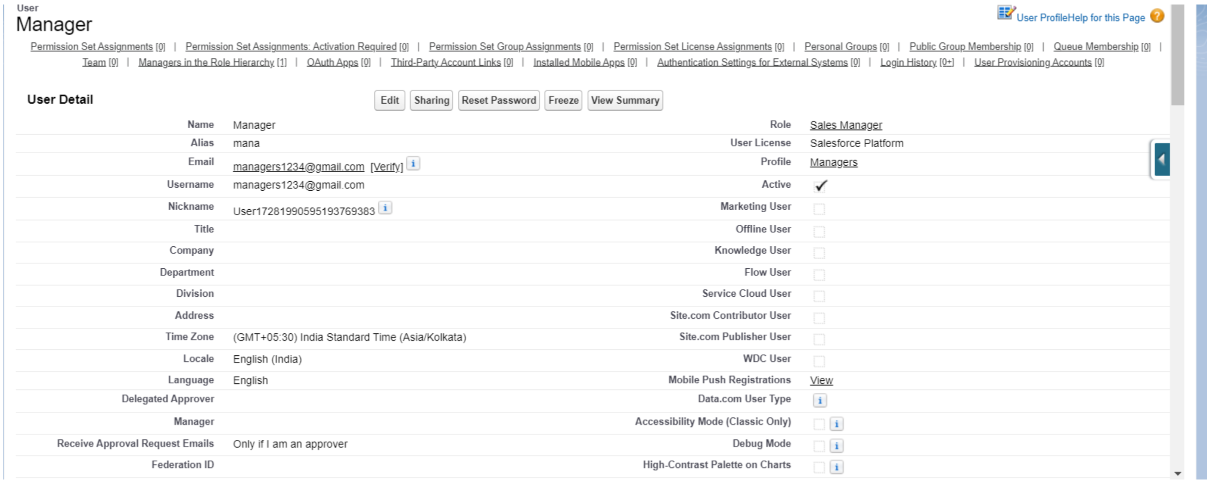


Executive Executive

User Detail

Name	Executive Executive	Role	Sales Executive
Alias	exec	User License	Salesforce
Email	executive123@gmail.com [Verify]	Profile	System Administrator
Username	executive123@gmail.com	Active	✓
Nickname	User17281988450823577100	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (India)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	☐
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐
Federation ID		High-Contrast Palette on Charts	☐
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	✓

2. User-2 Manager

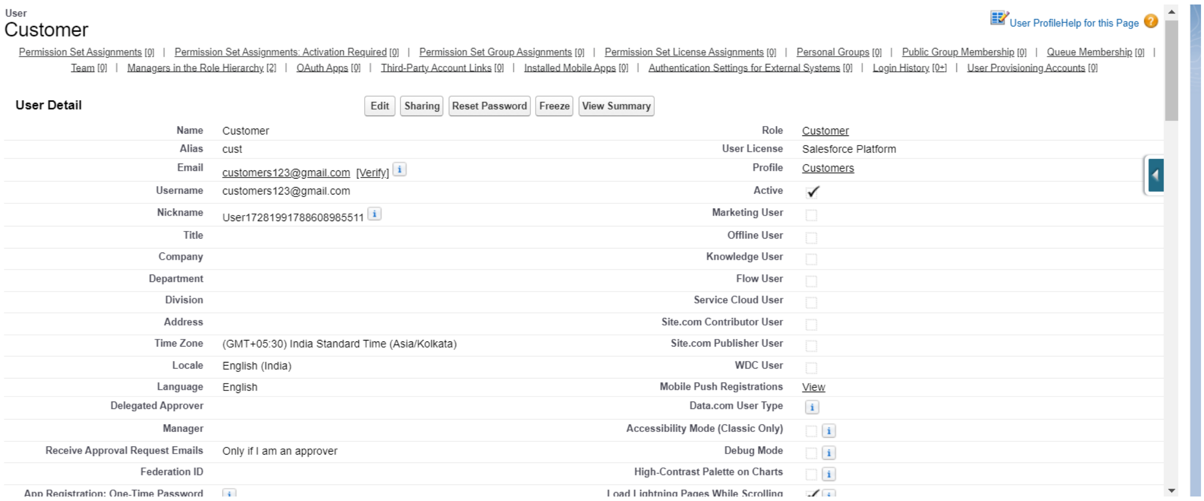


User
Manager

User Detail

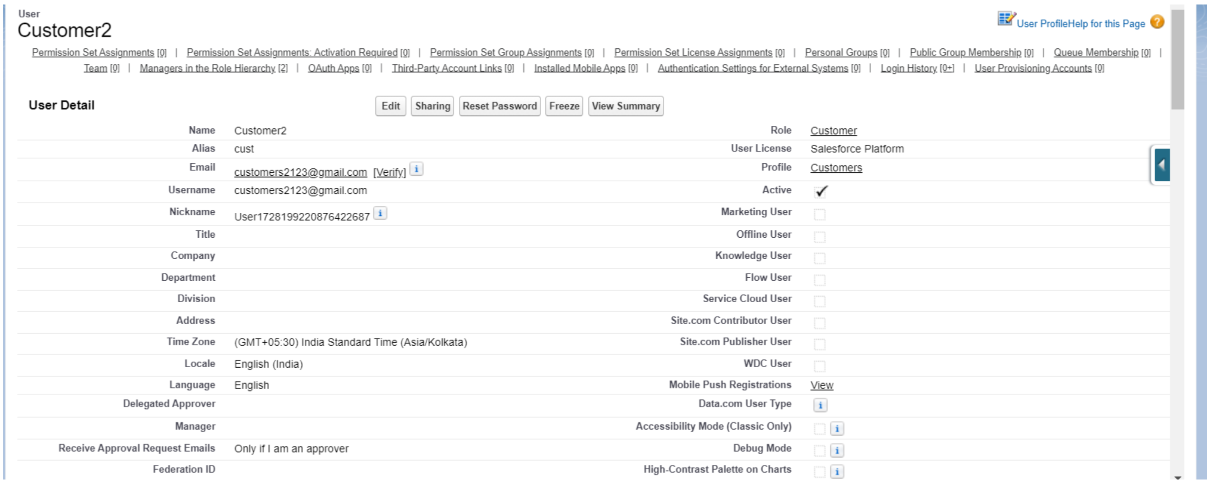
Name	Manager	Role	Sales Manager
Alias	mana	User License	Salesforce Platform
Email	managers1234@gmail.com [Verify]	Profile	Managers
Username	managers1234@gmail.com	Active	✓
Nickname	User17281990595193769383	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (India)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	☐
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐
Federation ID		High-Contrast Palette on Charts	☐

3. User-3 Customer



Name	Customer	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	customers123@gmail.com [Verify]	Profile	Customers
Username	customers123@gmail.com	Active	✓
Nickname	User17281991788608985511	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (India)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	☐
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐
Federation ID		High-Contrast Palette on Charts	☐
App Registration: One-Time Password		Load Lightning Pages While Scrolling	✓

4. User-4 Customer2



Name	Customer2	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	customers2123@gmail.com [Verify]	Profile	Customers
Username	customers2123@gmail.com	Active	✓
Nickname	User1728199220876422687	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (India)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	☐
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐
Federation ID		High-Contrast Palette on Charts	☐

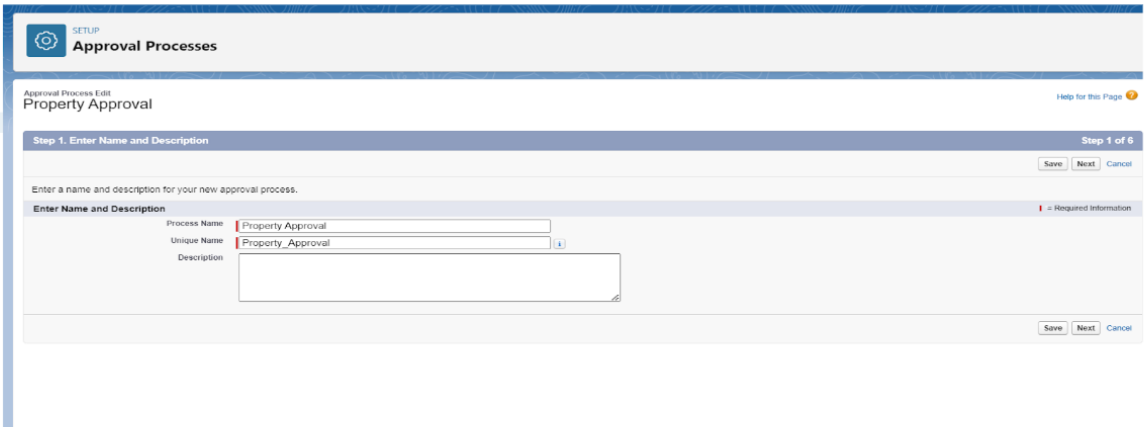
Task 9

Create an Approval Process for Property Object

An Approval process to approve or reject the records as according

A. From Setup >> Process Automation >> Approval Process .

B. Process Name - Property Approval.



Approval Process Edit

Property Approval

Step 1. Enter Name and Description — Step 1 of 6

Enter a name and description for your new approval process.

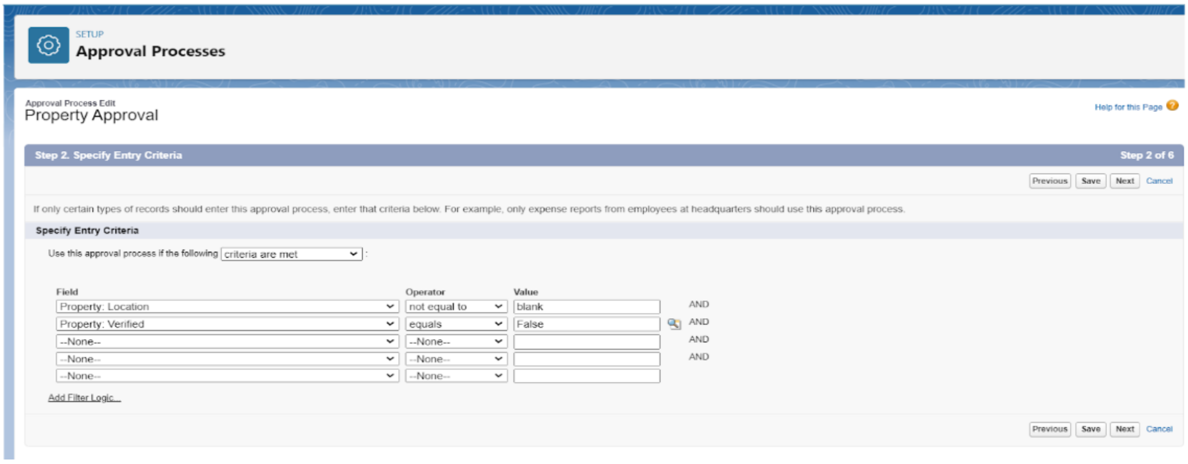
Enter Name and Description — = Required Information

Process Name: Property Approval

Unique Name: Property_Approval

Description:

C. Give 2 criteria – Location is not equal to blank, Verified Equals false.



Approval Process Edit

Property Approval

Step 2. Specify Entry Criteria — Step 2 of 6

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.

Specify Entry Criteria

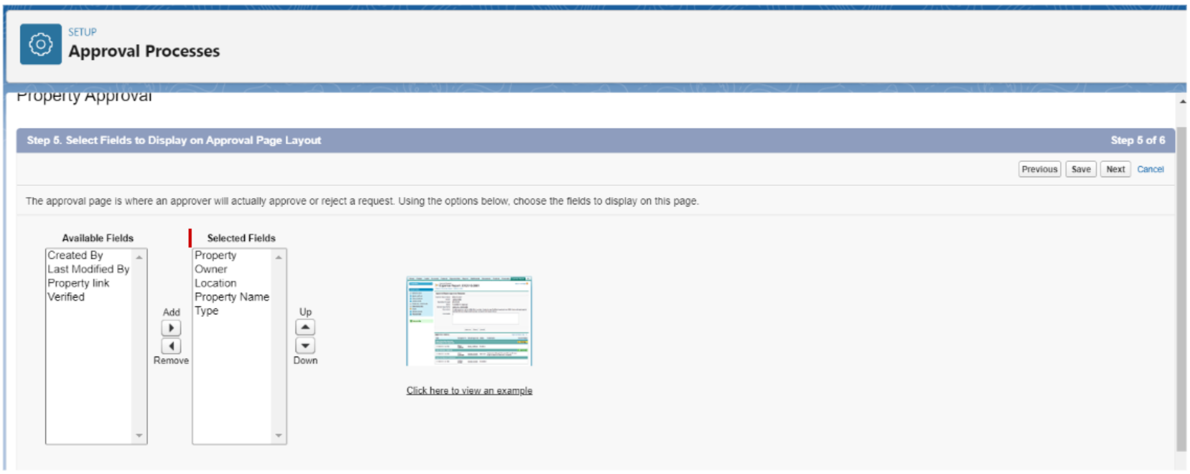
Use this approval process if the following criteria are met :

Field	Operator	Value	
Property: Location	not equal to	blank	AND
Property: Verified	equals	False	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

D. Click next and “Next Automated Approver Determined By” Select Manager.

E. From Record Editability Properties >> Click on Administrators OR the currently assigned approver can edit records during the approval process.

F. From Step 5. Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.



Step 5. Select Fields to Display on Approval Page Layout

Step 5 of 6

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

G. Click Next and Select the initial Submiters >>

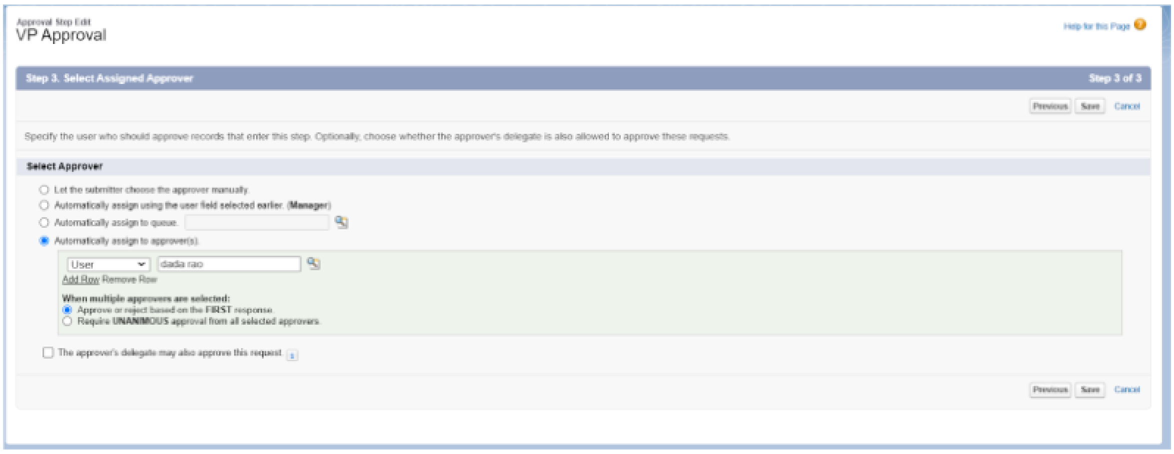
a. Owner >> Property Owner

b. Roles >> Sales Manager

H. Save and Add an approval step name “Executive Approval ”.

I. Specify the Criteria >> All record should enter .

J. click next and select the Approver as “ Sales Executive “ and “Save”.



Approval Step Edit

VP Approval

Step 3. Select Assigned Approver — Step 3 of 3

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Select Approver

○ Let the submitter choose the approver manually.
○ Automatically assign using the user field selected earlier. (**Manager**)
○ Automatically assign to queue.
● Automatically assign to approver(s).

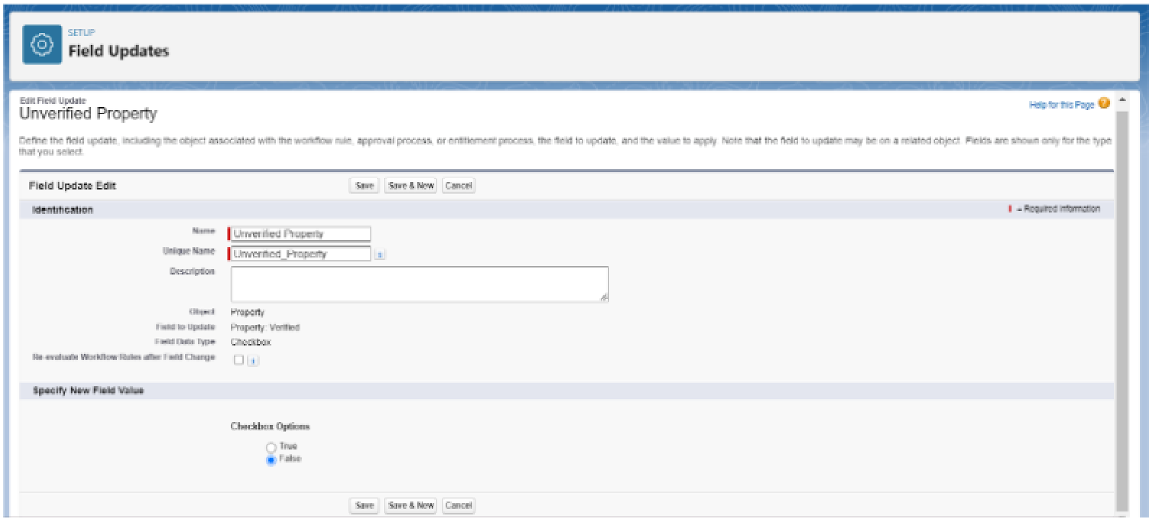
User dada rao

When multiple approvers are selected:
● Approve or reject based on the FIRST response.
○ Require UNANIMOUS approval from all selected approvers.

☐ The approver's delegate may also approve this request.

K. Add One field Update as “Verified Property”.

L. Add One field Update as “UnVerified Property”



SETUP

Field Updates

Edit Field Update

Unverified Property

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Identification

Name: Unverified Property
Unique Name: Unverified_Property
Description:
Object: Property
Field to Update: Property: Verified
Field Data Type: Checkbox
Re-evaluate Workflow Rules after Field Change: ☐

Specify New Field Value

Checkbox Options
○ True
● False

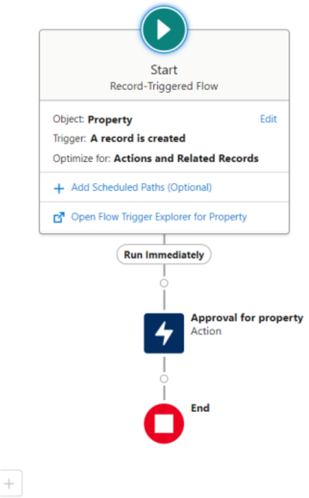
M. Activate the Approval Process.

Task 10

Create a Record trigger flow to submit the Approval Process Automatically.

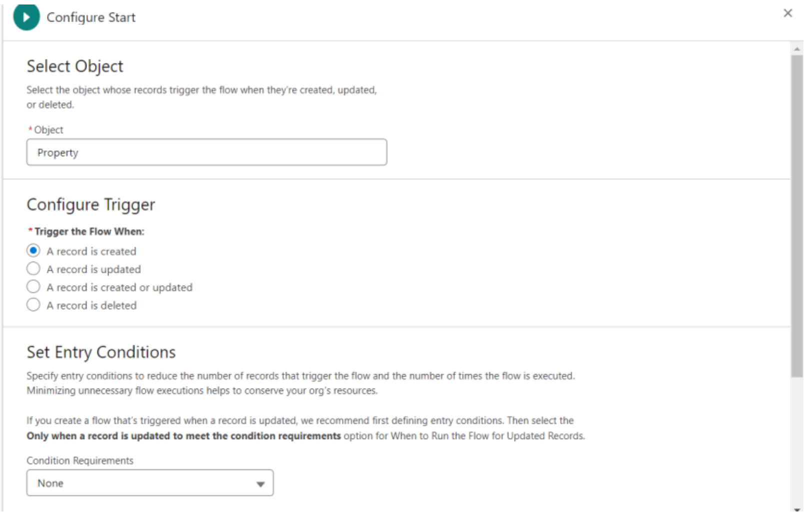
A flow that can submit the records directly for approval.

1. Search for Flows >> Click On New and Select “Record Trigger Flow”.
2. In Property. Select “Trigger the flow when” >> “A record is created”
3. Set Entry Conditions >> “None”.



Start
Record-Triggered Flow

Object: **Property**
Trigger: **A record is created**
Optimize for: **Actions and Related Records**



Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object: Property

Configure Trigger

* **Trigger the Flow When:**

● A record is created
○ A record is updated
○ A record is created or updated
○ A record is deleted

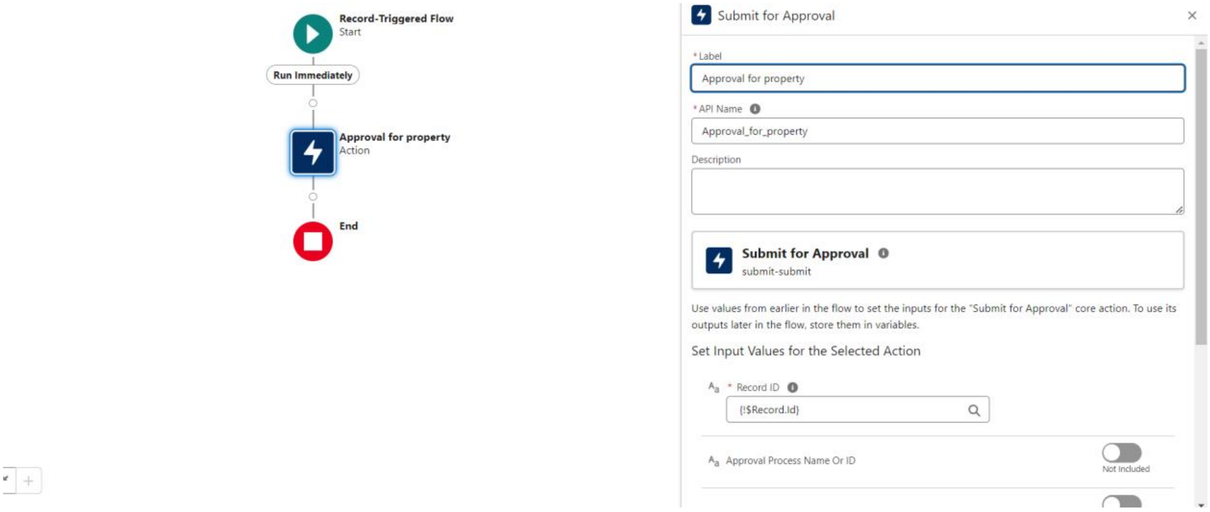
Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements: None

4. Add a “Action” >> “Submit for Approval”
5. Give Label >> Approval for property
6. Record Id >> {!$Record.Id} and Done.



Submit for Approval

* Label: Approval for property

* API Name: Approval_for_property

Description

Submit for Approval
submit-submit

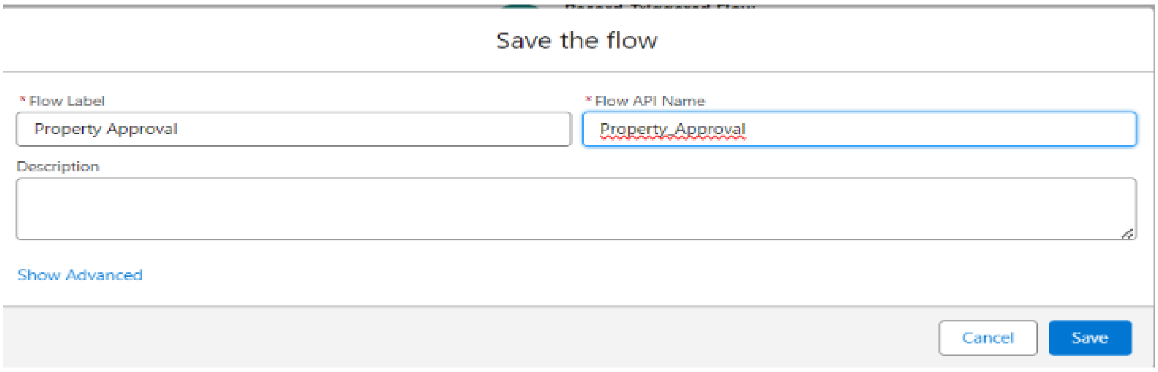
Use values from earlier in the flow to set the inputs for the "Submit for Approval" core action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

* Record ID: {!$Record.Id}

Approval Process Name Or ID — Not Included

7. Save the Flow and Give label as "Property Approval" and "Activate".


Save the flow

* Flow Label: Property Approval

* Flow API Name: Property_Approval

Description

Task 11

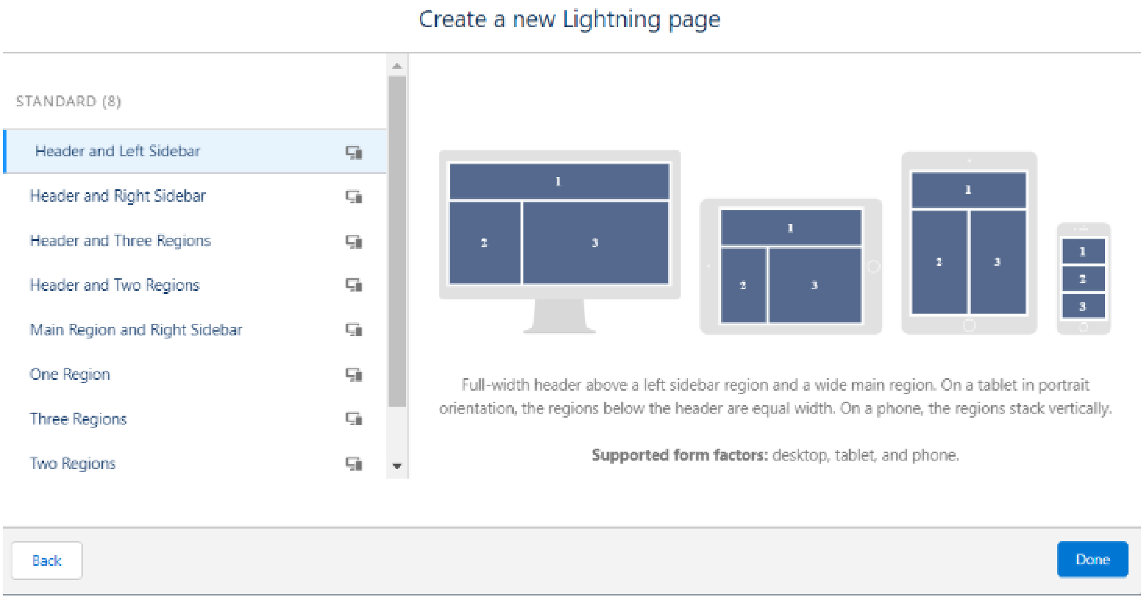
Create an App Page

Create an App Page on the Property details Object named as "Search Your Property".

1. From Setup >> Go to Lightning App Builder >> Click on New >> Select App Page and Click on Next.

2. Give Label as “Search your Property” click “Next”.

3. Click “header and Left Sidebar” and Click on “Done”.

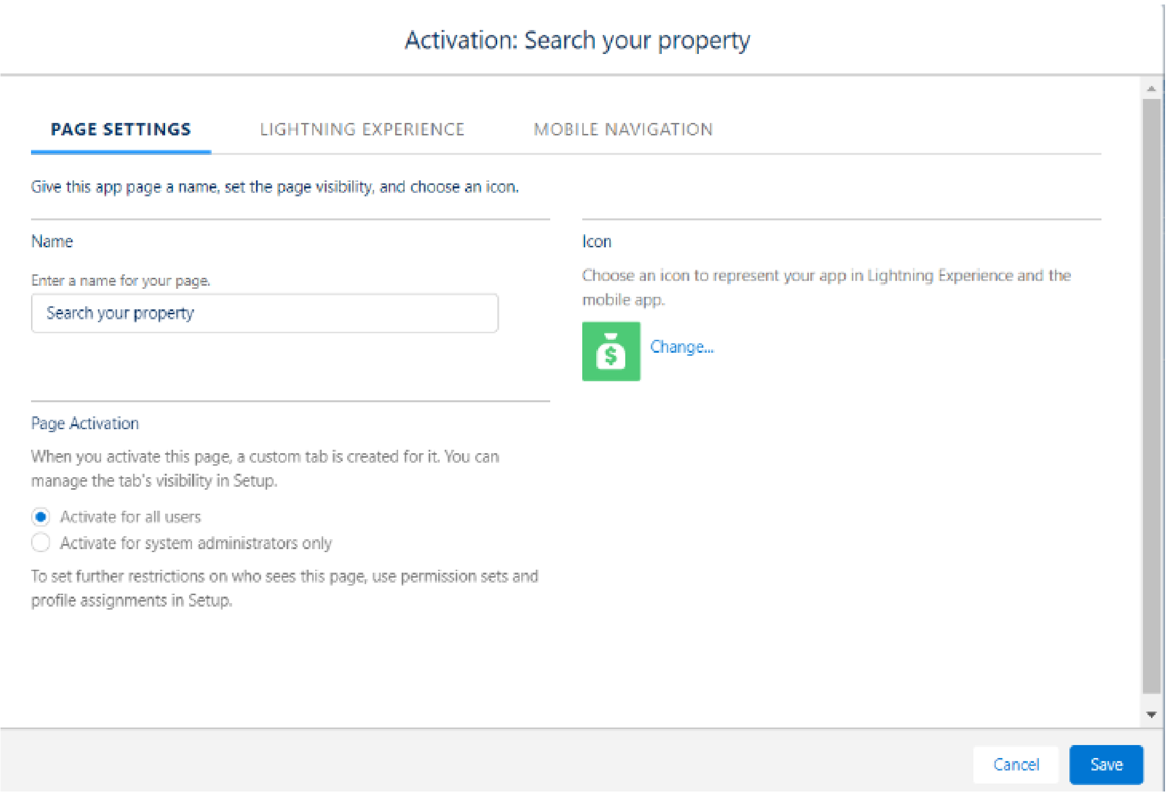


Full-width header above a left sidebar region and a wide main region. On a tablet in portrait orientation, the regions below the header are equal width. On a phone, the regions stack vertically.

Supported form factors: desktop, tablet, and phone.

4. Click on “Save ” and then click on “Activate”.

5. From Page Setting select page activation as “Activate for all Users”.



Activation: Search your property

Give this app page a name, set the page visibility, and choose an icon.

Name

Enter a name for your page.

Search your property

Icon

Choose an icon to represent your app in Lightning Experience and the mobile app.

Page Activation

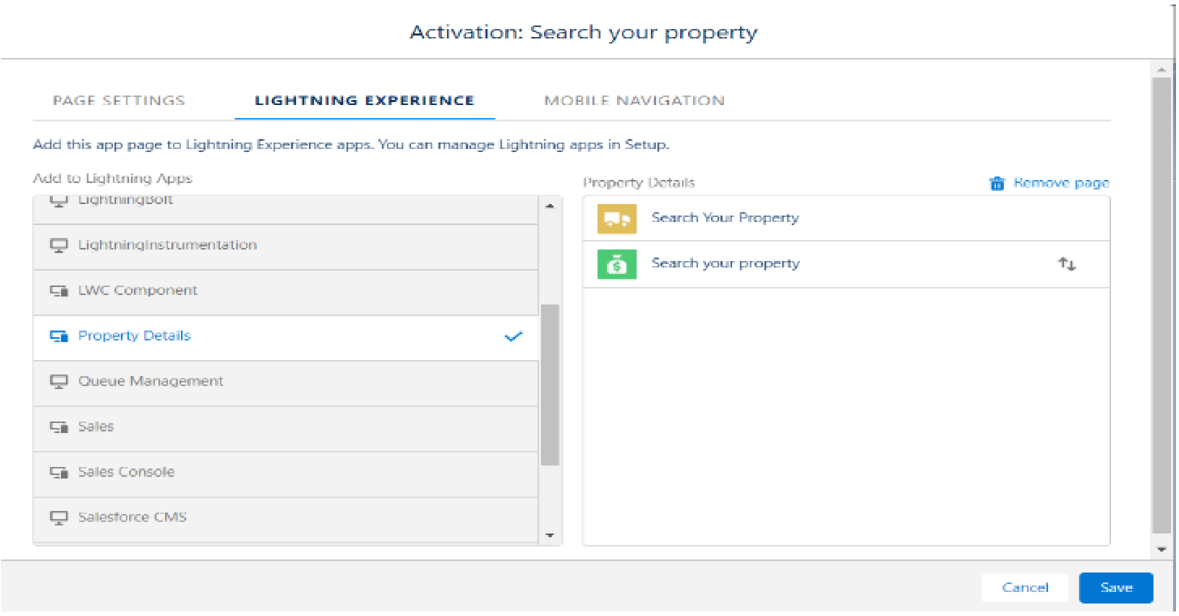
When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup.

● Activate for all users

○ Activate for system administrators only

To set further restrictions on who sees this page, use permission sets and profile assignments in Setup.

6. From Lightning Experience Click on “Property Details” and click on Add Page“.



Activation: Search your property

Add this app page to Lightning Experience apps. You can manage Lightning apps in Setup.

Add to Lightning Apps

Property Details ✓

Property Details

Search Your Property

Search your property

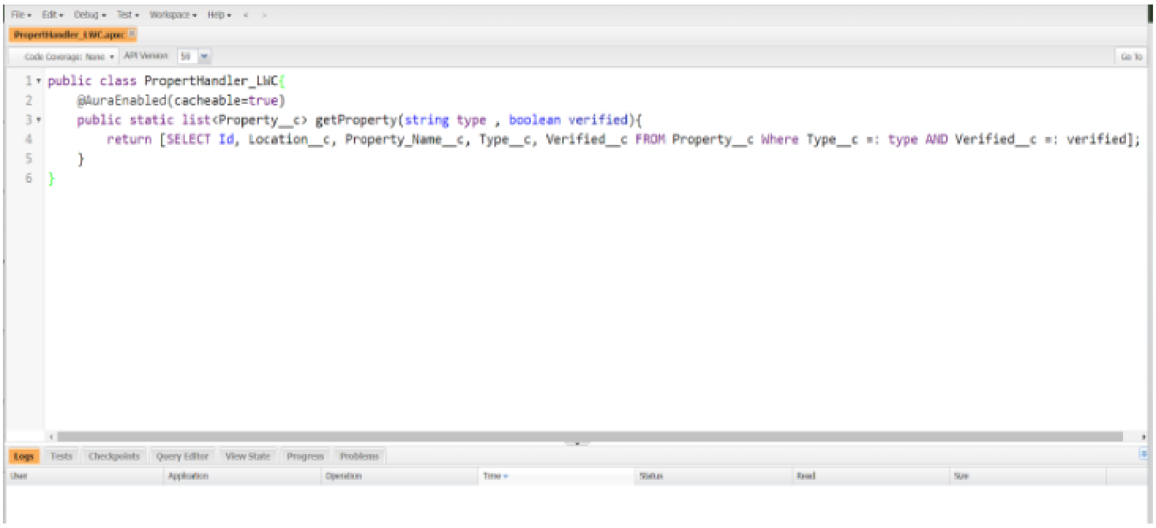
7. Then Click on “Save”.

Task 12

Create a LWC Component

Create an LWC Component for the customers so that only verified customers can access the verified properties and non-Verified customers can access non verified properties, and deploy it on “Search your Property Page”.

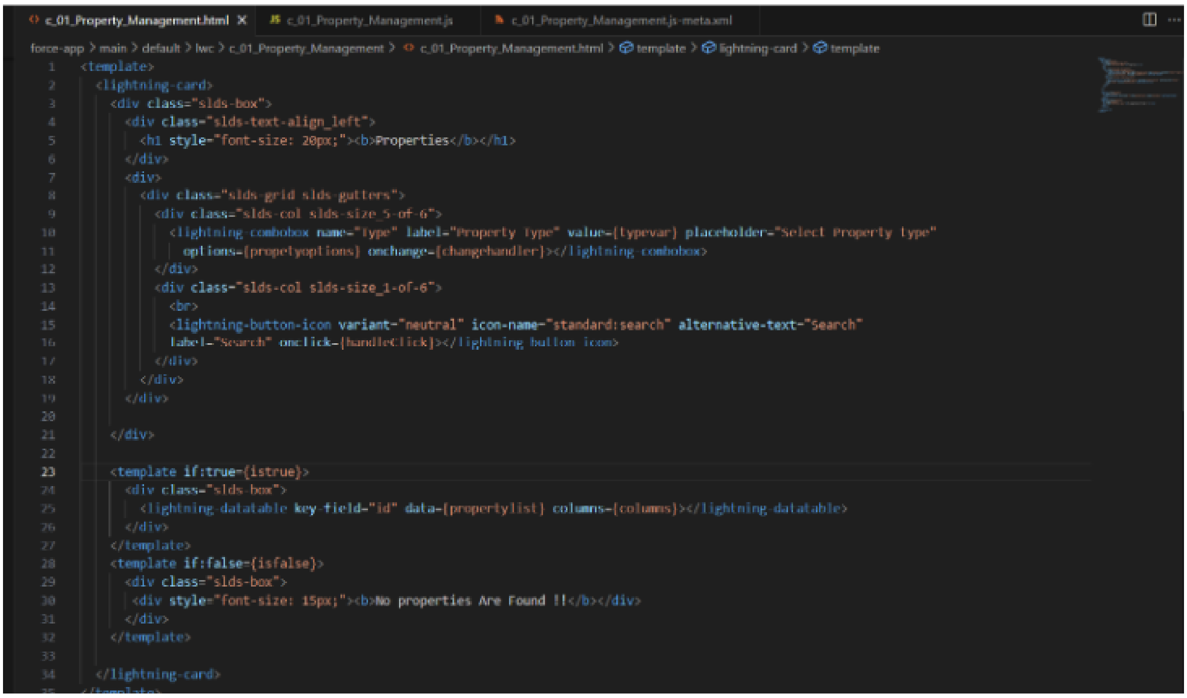
1. Create an Apex Class and make it aura enabled and name it “PropertHandler_LWC”.



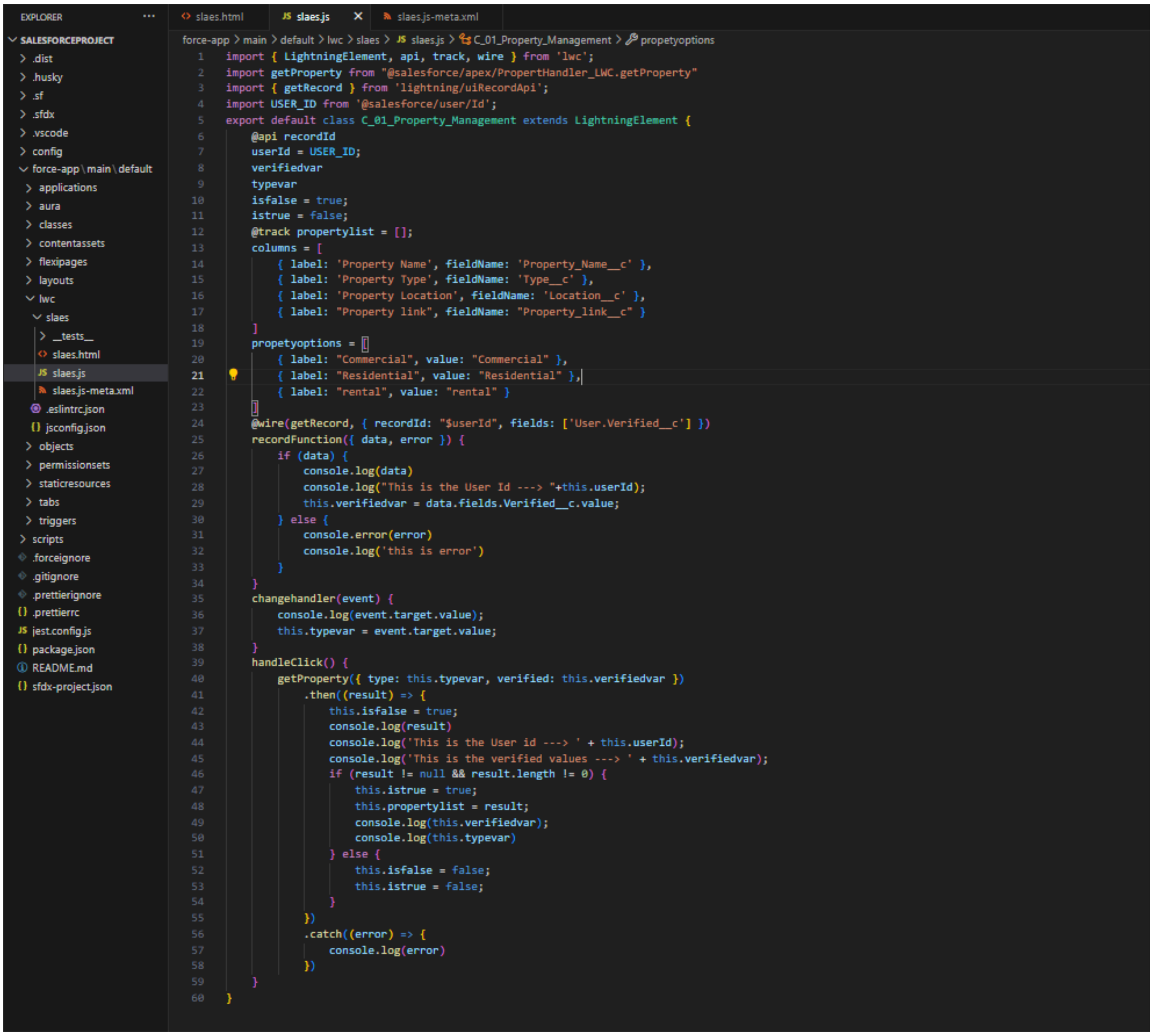
```
public class PropertHandler_LWC{
    @AuraEnabled(cacheable=true)
    public static list<Property__c> getProperty(string type , boolean verified){
        return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM Property__c Where Type__c =: type AND Verified__c =: verified];
    }
}
```

2. Create a Lightning Web Component in your VsCode, and (ctrl+shift +P) and click on authorize an org. Enter your login id and password to authorize your org.

3. Now (ctrl+shift +P) and Create a lightning Web Component and Name it Anything you want to.
4. In Html File: -



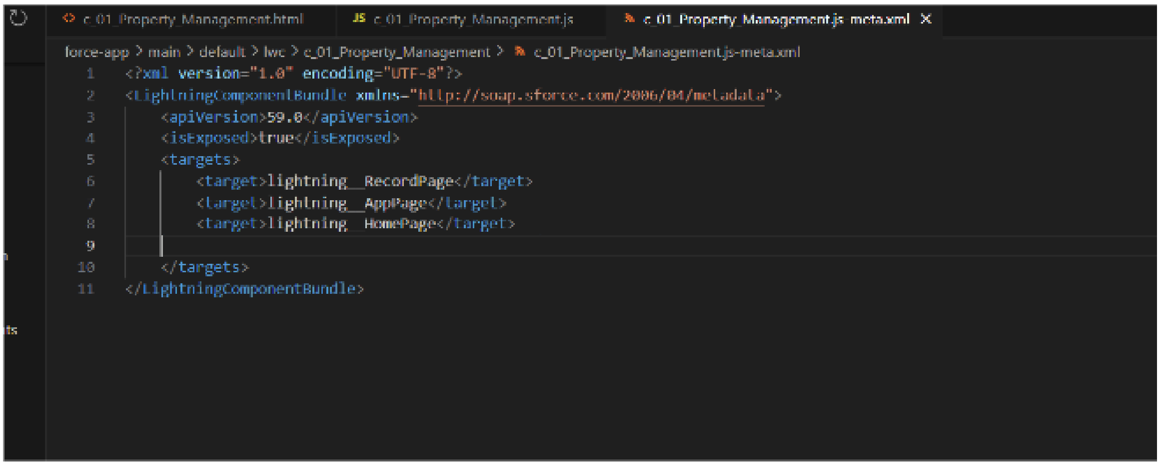
```html
<template>
    <lightning-card>
        <div class="slds-box">
            <div class="slds-text-align_left">
                <h1 style="font-size: 20px;"><b>Properties</b></h1>
            </div>
            <div>
                <div class="slds-grid slds-gutters">
                    <div class="slds-col slds-size_5-of-6">
                        <lightning-combobox name="Type" label="Property Type" value={typevar} placeholder="Select Property Type"
                          options={propetyoptions} onchange={changehandler}></lightning-combobox>
                    </div>
                    <div class="slds-col slds-size_1-of-6">
                        <br>
                        <lightning-button-icon variant="neutral" icon-name="standard:search" alternative-text="Search"
                        label="Search" onclick={handleClick}></lightning-button-icon>
                    </div>
                </div>
            </div>

        </div>

        <template if:true={istrue}>
            <div class="slds-box">
                <lightning-datatable key-field="id" data={propertylist} columns={columns}></lightning-datatable>
            </div>
        </template>
        <template if:false={isfalse}>
            <div class="slds-box">
             <div style="font-size: 15px;"><b>No properties Are Found !!</b></div>
            </div>
        </template>

    </lightning-card>
</template>
```



```javascript
import { LightningElement, api, track, wire } from 'lwc';
import getProperty from "@salesforce/apex/PropertHandler_LWC.getProperty"
import { getRecord } from 'lightning/uiRecordApi';
import USER_ID from '@salesforce/user/Id';
export default class C_01_Property_Management extends LightningElement {
    @api recordId
    userId = USER_ID;
    verifiedvar
    typevar
    isfalse = true;
    istrue = false;
    @track propertylist = [];
    columns = [
        { label: 'Property Name', fieldName: 'Property_Name__c' },
        { label: 'Property Type', fieldName: 'Type__c' },
        { label: 'Property Location', fieldName: 'Location__c' },
        { label: "Property link", fieldName: "Property_link__c" }
    ]
    propetyoptions = [
        { label: "Commercial", value: "Commercial" },
        { label: "Residential", value: "Residential" },
        { label: "rental", value: "rental" }
    ]
    @wire(getRecord, { recordId: "$userId", fields: ['User.Verified__c'] })
    recordFunction({ data, error }) {
        if (data) {
            console.log(data)
            console.log("This is the User Id ---> "+this.userId);
            this.verifiedvar = data.fields.Verified__c.value;
        } else {
            console.error(error)
            console.log('this is error')
        }
    }
    changehandler(event) {
        console.log(event.target.value);
        this.typevar = event.target.value;
    }
    handleClick() {
        getProperty({ type: this.typevar, verified: this.verifiedvar })
            .then((result) => {
                this.isfalse = true;
                console.log(result)
                console.log('This is the User id ---> ' + this.userId);
                console.log('This is the verified values ---> ' + this.verifiedvar);
                if (result != null && result.length != 0) {
                    this.istrue = true;
                    this.propertylist = result;
                    console.log(this.verifiedvar);
                    console.log(this.typevar)
                } else {
                    this.isfalse = false;
                    this.istrue = false;
                }
            })
            .catch((error) => {
                console.log(error)
            })
    }
}
```

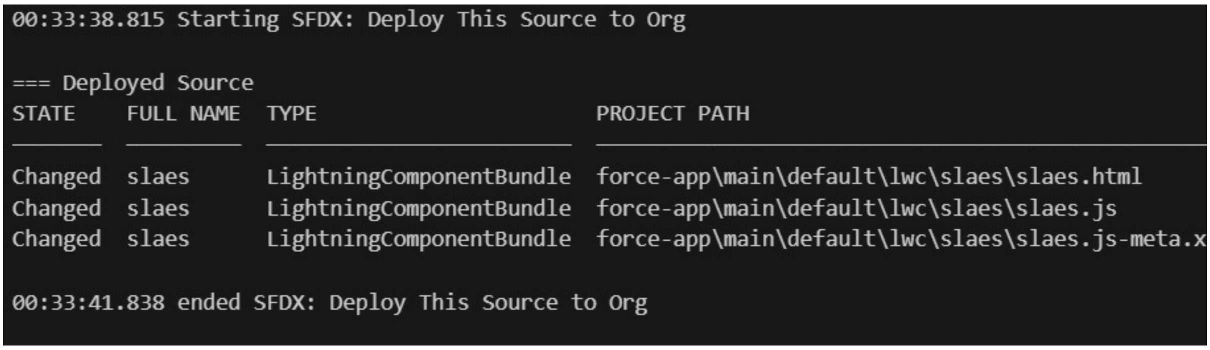
5. In Js File:-

6. In meta File:-



```xml
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
    <apiVersion>59.0</apiVersion>
    <isExposed>true</isExposed>
    <targets>
        <target>lightning__RecordPage</target>
        <target>lightning__AppPage</target>
        <target>lightning__HomePage</target>

    </targets>
</LightningComponentBundle>
```

7. After Saving all the three Codes, Right Click and deploy this component to the org.



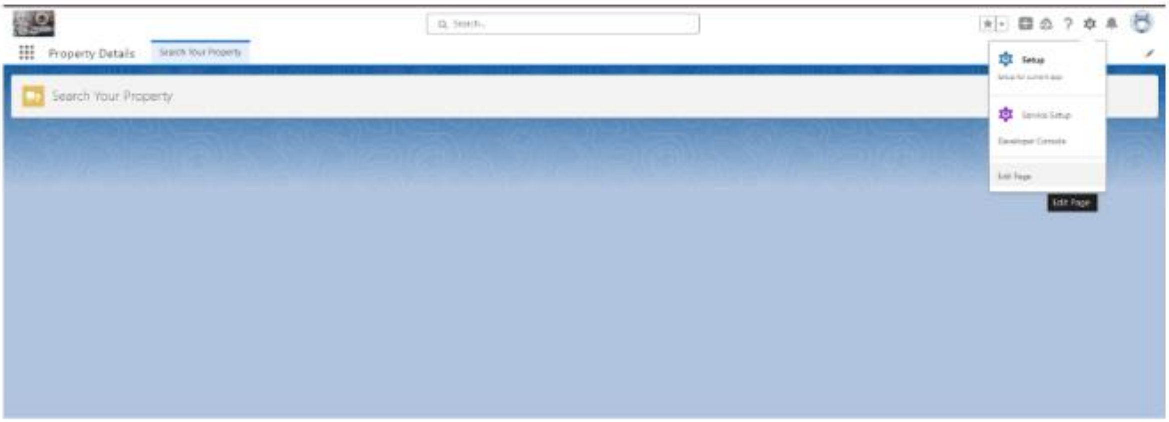
```
00:33:38.815 Starting SFDX: Deploy This Source to Org

=== Deployed Source
STATE    FULL NAME  TYPE                      PROJECT PATH
───────  ─────────  ────────────────────────  ──────────────────────────────────────────────
Changed  slaes      LightningComponentBundle  force-app\main\default\lwc\slaes\slaes.html
Changed  slaes      LightningComponentBundle  force-app\main\default\lwc\slaes\slaes.js
Changed  slaes      LightningComponentBundle  force-app\main\default\lwc\slaes\slaes.js-meta.x

00:33:41.838 ended SFDX: Deploy This Source to Org
```

Task 13

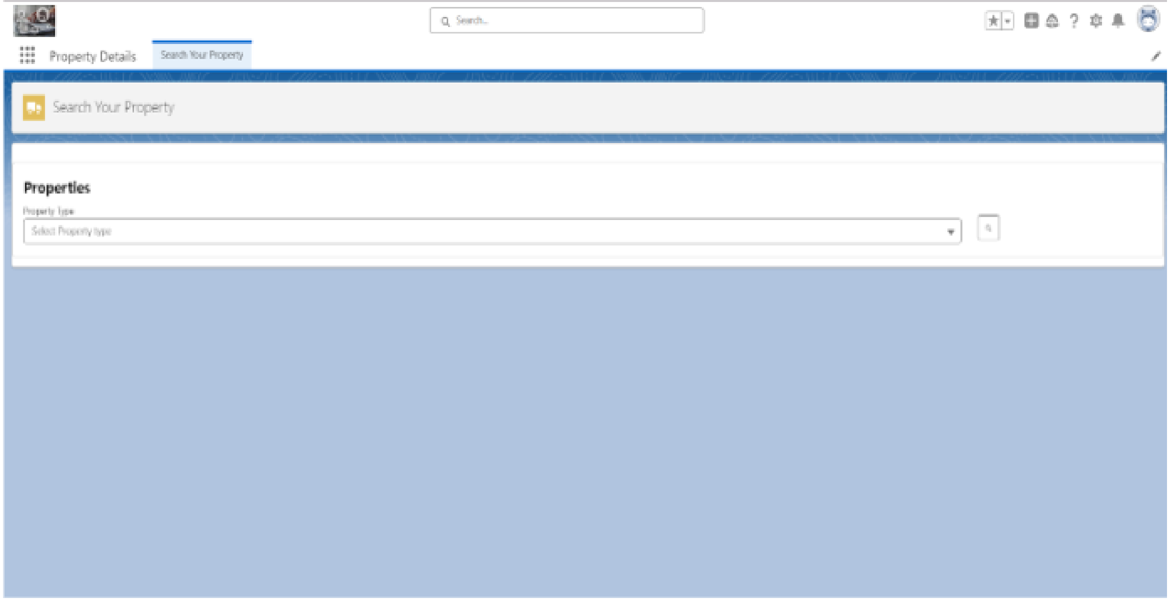
Drag the component to your App Page.

Adding the Component to your Page

1. From Setup >> Go to App Launcher >> Search for Property Details.
2. On this Page click on gear icon and click on Edit Page.



3. Drag the Component to your App Page and Save the Page.

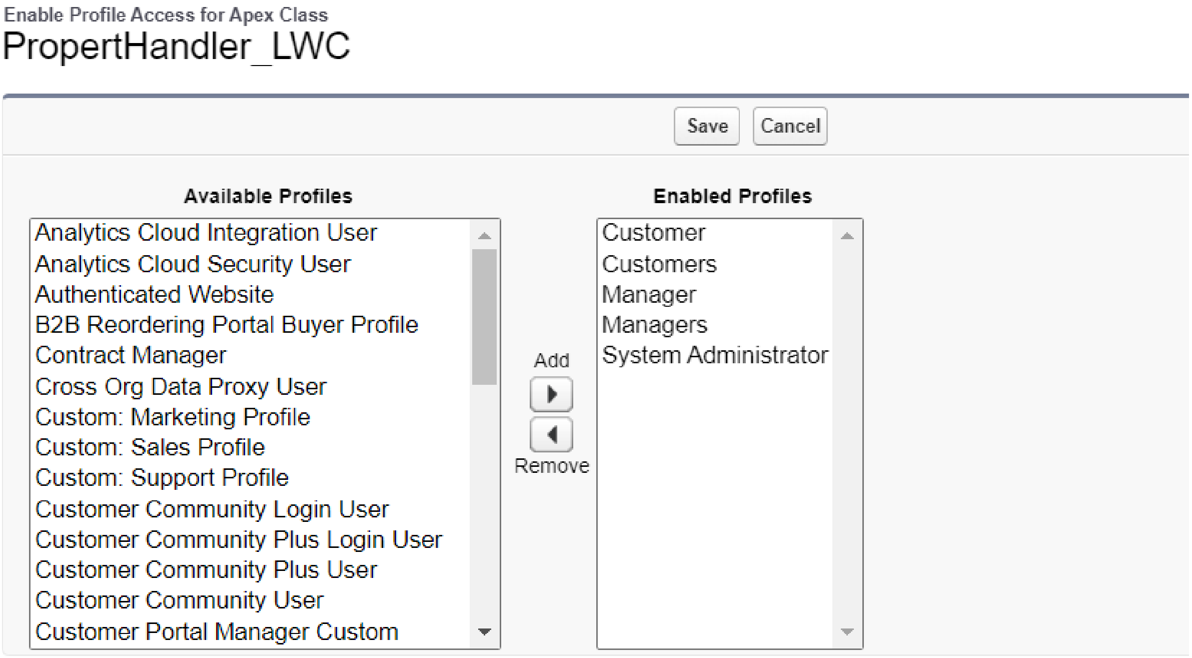


Task 14

Give Access of Apex Classes to Profiles

The Apex Class has a Security, Enable the security for the profiles that needs to access this class.

1. From Setup >> Search for Apex Classes >> Click on "Security" behind "PropertyHandler__LWC".
2. From Profiles Add "Manager" and "Customer" and "Save".



Enable Profile Access for Apex Class

PropertHandler_LWC

Available Profiles	Enabled Profiles
Analytics Cloud Integration User Analytics Cloud Security User Authenticated Website B2B Reordering Portal Buyer Profile Contract Manager Cross Org Data Proxy User Custom: Marketing Profile Custom: Sales Profile Custom: Support Profile Customer Community Login User Customer Community Plus Login User Customer Community Plus User Customer Community User Customer Portal Manager Custom	Customer Customers Manager Managers System Administrator

Conclusion:

The integration of Salesforce into Our World Properties' operations has significantly improved both customer engagement and internal efficiency. By automating the capture of customer information and tailoring property selections based on user approval status, the company provides a more personalized and seamless experience. This not only enhances customer satisfaction but also positions Our World Properties for sustainable growth in the competitive real estate market. As the business continues to evolve, leveraging Salesforce's powerful tools will enable the company to stay ahead of industry trends and better meet customer needs.

Future Works:

Looking ahead, Our World Properties can expand the capabilities of its Salesforce integration by incorporating advanced analytics and AI-driven insights. This would allow the company to predict customer preferences more accurately and offer even more personalized property recommendations. Integrating additional customer engagement channels, such as social media and mobile apps, into Salesforce could further enhance data collection and interaction tracking. Additionally, optimizing workflow automation within Salesforce, such as contract management and lead nurturing, can improve operational efficiency. Continuous improvement in these areas will enable Our World Properties to stay competitive, scale effectively, and provide a superior customer experience in the evolving real estate landscape.

Thank You