SRI RANGAPOOPATHI COLLEGE OF ENGINEERING

Introduction to a CRM Application for Handling Clients and Their Property-Related Requirements.

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Introduction to a CRM Application for Handling Clients and Their Property-Related Requirements

In today's competitive real estate market, managing client relationships and property transactions efficiently is crucial for success. Real estate businesses, property managers, and agents face the constant challenge of keeping track of numerous client preferences, property listings, inquiries, appointments, and follow-ups. A **Customer Relationship Management (CRM)** application designed specifically for managing clients and their property-related requirements can significantly streamline these processes, improve client satisfaction, and enhance business efficiency.

This CRM application serves as a centralized platform to handle all aspects of client management, property listings, lead generation, sales tracking, and communication, tailored to the needs of the real estate industry. Whether you are managing buyers, sellers, renters, or investors, the CRM helps to better organize data, automate repetitive tasks, and provide personalized experiences for every client.

Key Features and Functions of the CRM Application:

1. Client Management:

Store detailed profiles for each client, capturing personal information, preferences, communication history, and specific property requirements.

Categorize clients based on their status (e.g., buyers, sellers, renters) and target them with tailored messaging and offers.

2. Property Listings Management:

Maintain a database of property listings, including detailed descriptions, images, pricing, and status updates (e.g., for sale, under contract, sold).

Allow clients to search properties based on their preferences and requirements, enhancing their experience.

3. Lead Generation and Opportunity Tracking:

Capture leads from various channels (website, social media, referrals) and track them throughout the sales funnel.

Automate follow-ups and keep detailed records of each interaction with potential clients, ensuring no lead is lost.

4. Communication Tools:

Integrated communication tools (email, SMS, chat) allow agents to engage with clients easily and keep track of all conversations.

Schedule property viewings, send automated reminders, and provide timely responses to client queries.

5. Document and Contract Management:

Securely store and share property-related documents, contracts, and agreements, making them accessible to both clients and agents.

Support electronic signatures to simplify the transaction process and ensure legal compliance.

6. Sales Pipeline and Task Management:

Visualize the entire sales process through customizable stages and manage tasks, appointments, and follow-ups with integrated calendars and reminders.

Track and manage the progress of each deal to ensure timely closings and reduce bottlenecks in the sales process.

7. Reporting and Analytics:

Generate detailed reports on sales performance, property views, lead sources, and agent activities to measure business growth and optimize marketing strategies.

Use data-driven insights to refine client targeting and sales strategies for better conversion rates.

8. Mobile Access:

With mobile app support, real estate agents can access property listings, client information, and manage tasks while on the go, ensuring they stay productive even outside the office

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

Hardware Required:

System with advance configuration

Software Required:

Salesforce Platform

System Required:

System with Advance configuration

Dreams 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

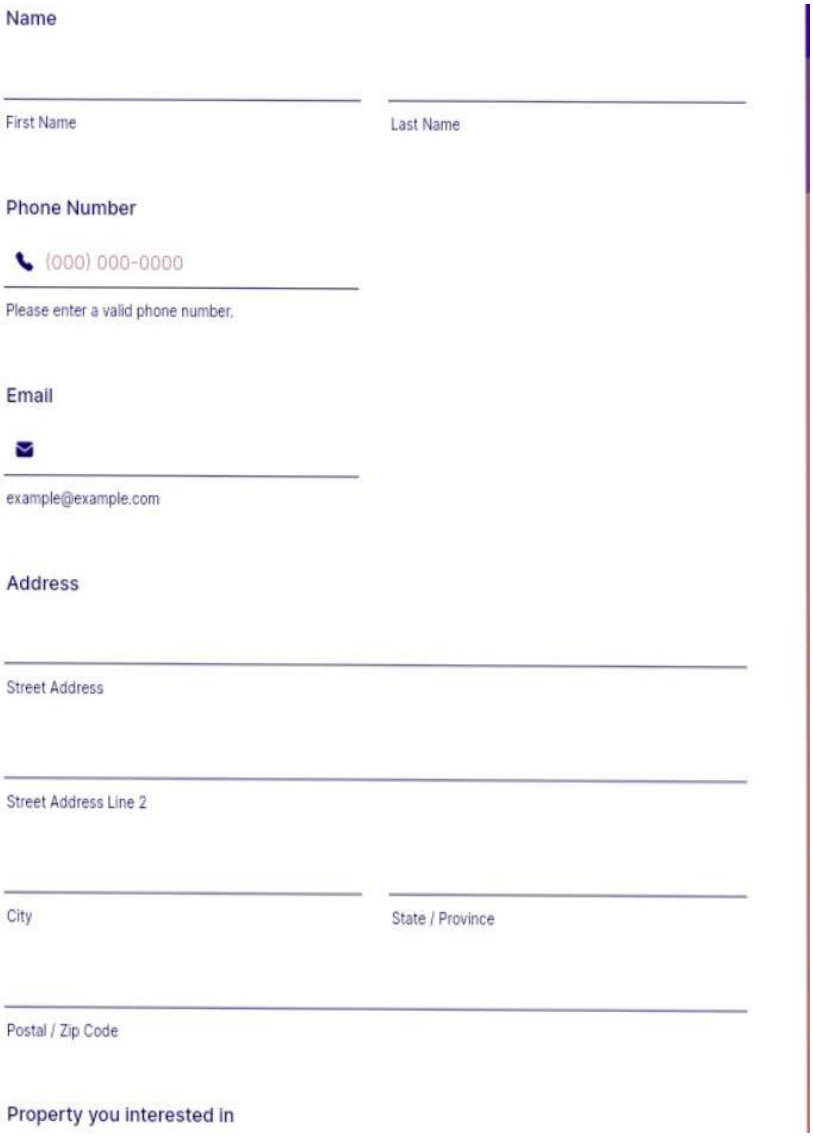
and efficiency, providing personalized recommendations and broader listings. Seamless integration optimizes operations, improving customer engagement and facilitating growth in the real estate market.

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.

Activity 1

1.Open your browser and search for jotform and log in.



2.After login click on create form and click on start from scratch

3.Now create a form to get the customer details like Name, Phone,Email, Address and type of property the customer is interested in.

4.Once the form is created, publish it by clicking on publish.

https://www.jotform.com/form/240031134484041

Create Objects from Spreadsheet.

Directly Creating Objects from Spreadsheet in Salesforce

Create Customer object

1. Go to your object manager and and click on create object from spreadsheet.
2. Click on the link to get the spreadsheet
3. customer
4. After downloading, upload the file, map the fields and upload to create an object.

Create Property object

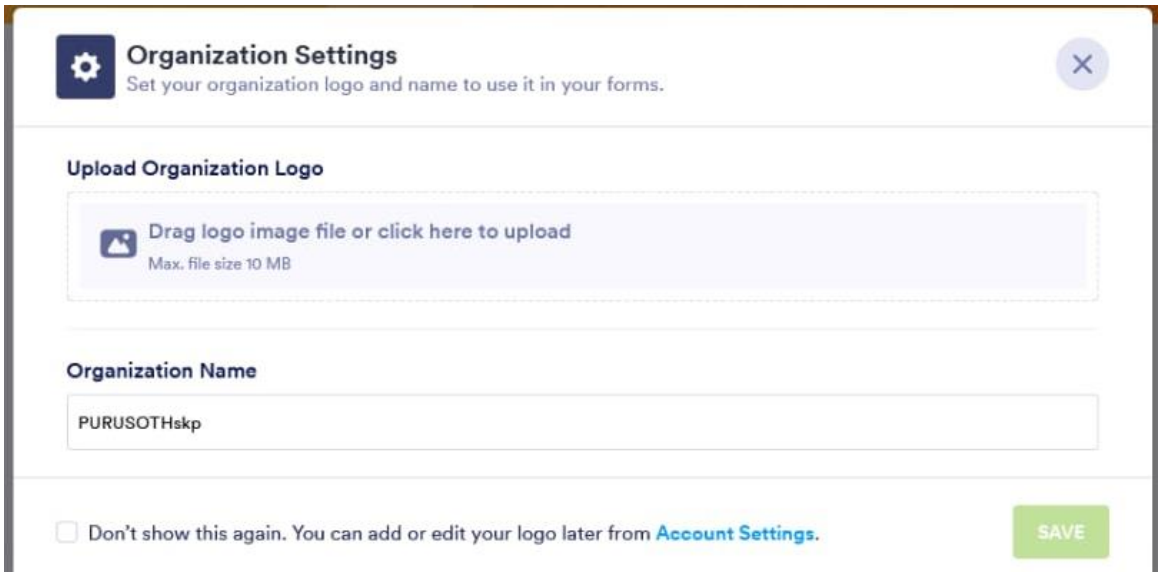
1. Follow the same from the customer object to create the Property Object
2. Property

Integrate Jotform with Salesforce Platform

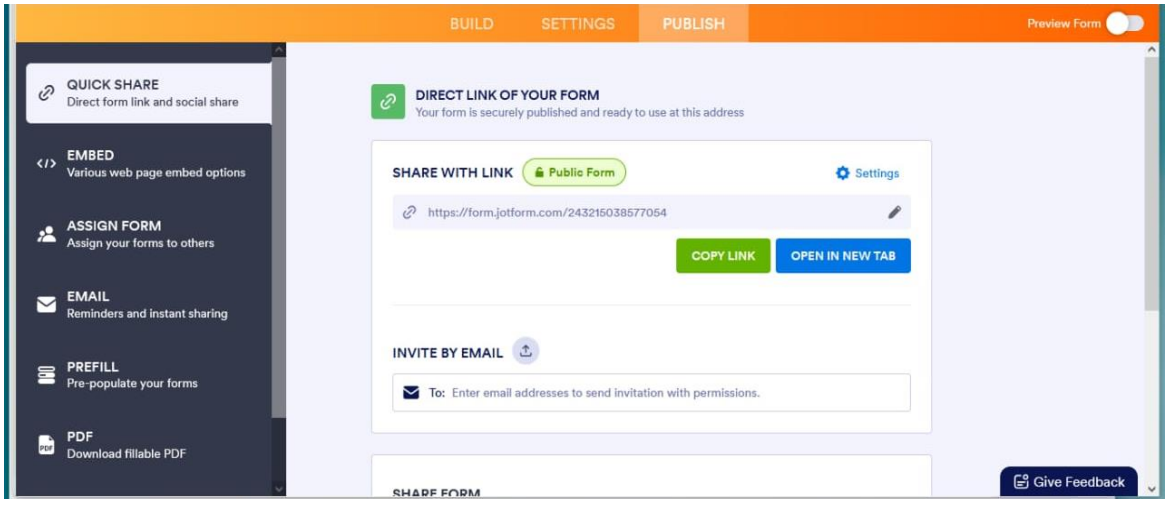
In this Milestone we are going to integrate jotform with Salesforce

Activity 1

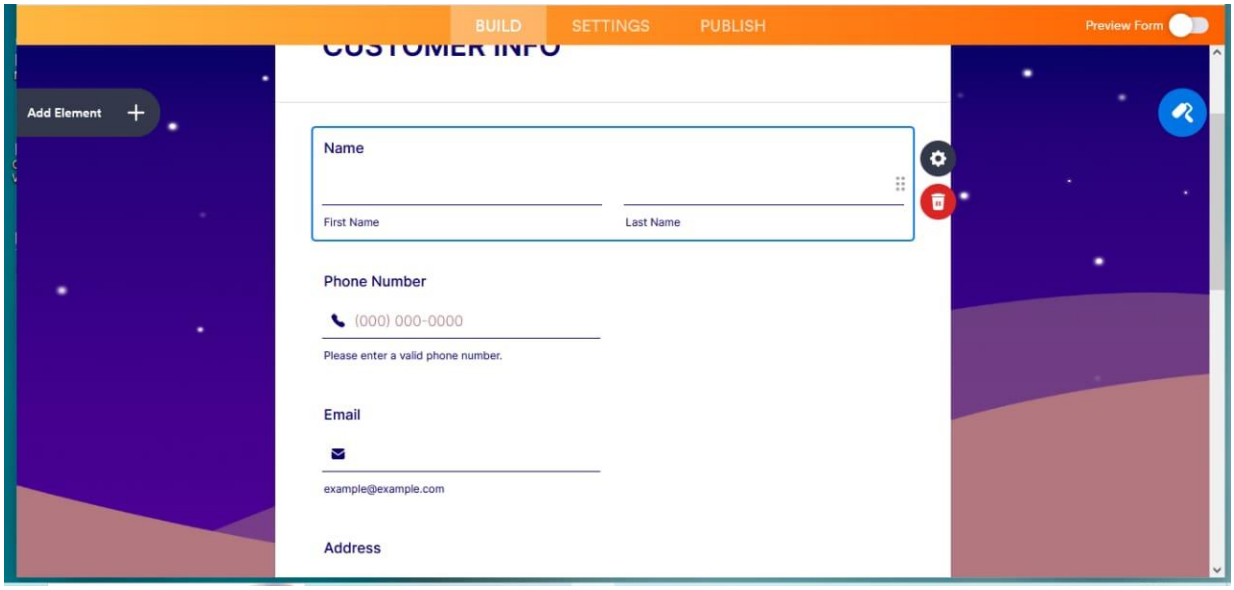
1. On the Jotform Platform, Click on Integration and choose Salesforce.



2. Click on User Integration and choose "Add to From"

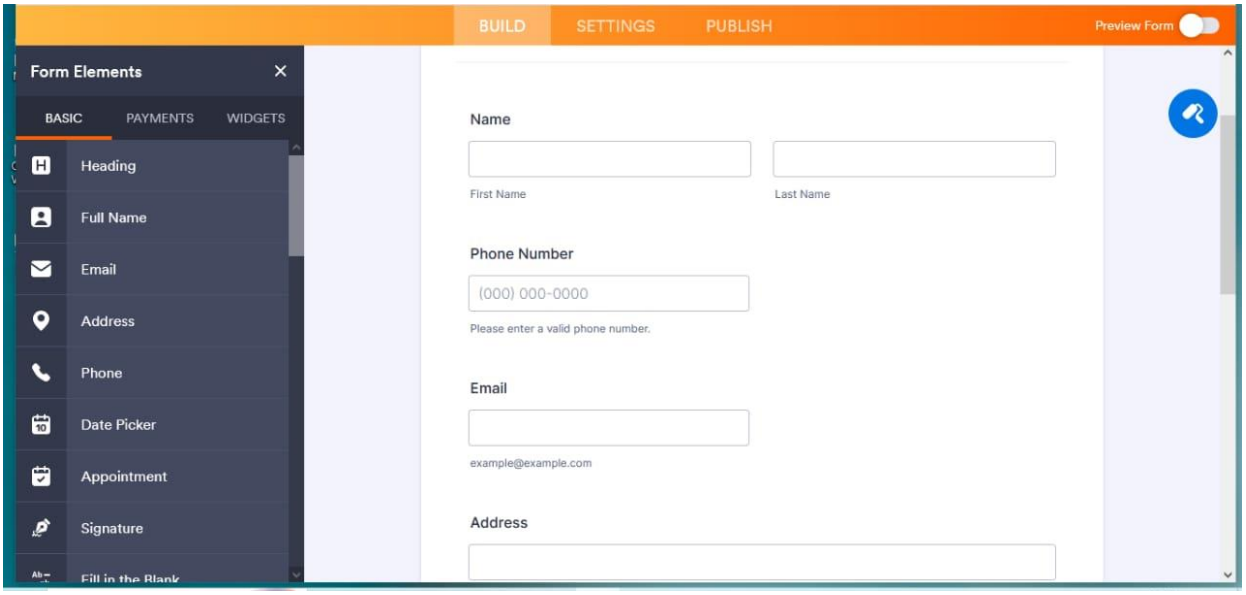


3. Select the Org with which you want to Integrate your jotform with.

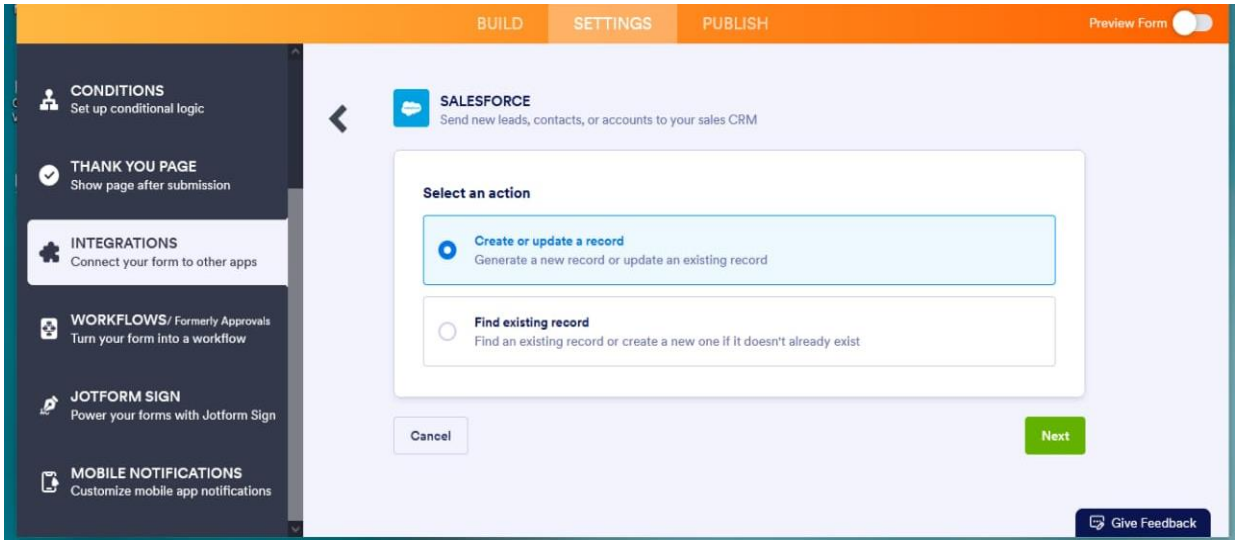


4. Select an Action - Create a record.

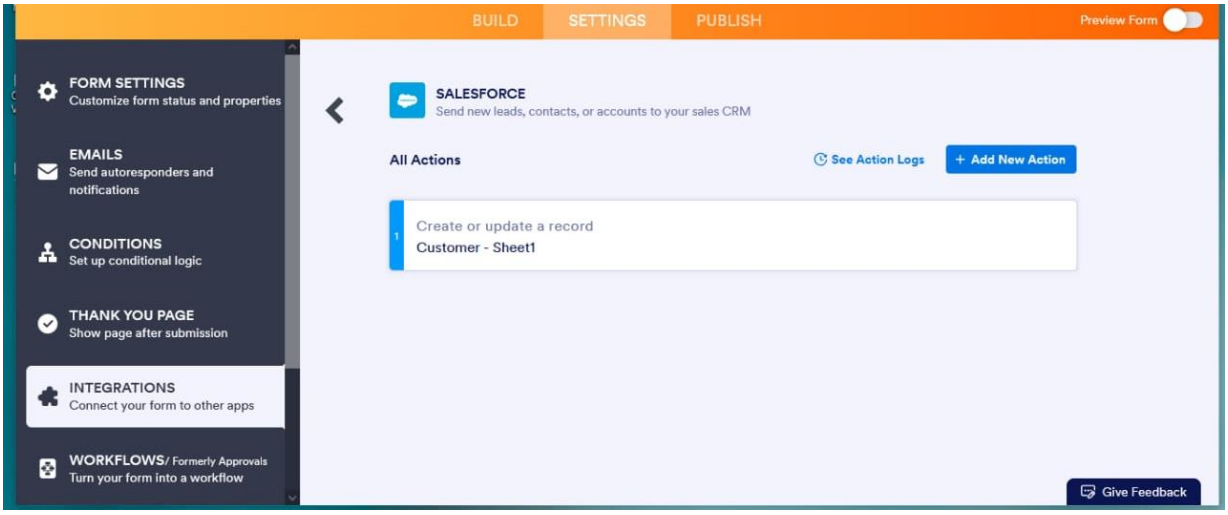
Select a Salesforce Object : - Customer



5. Map Each and every field on the Object with the fields on the form and “Save Action”.



6. Then “Save the Integration” and “Finish”.

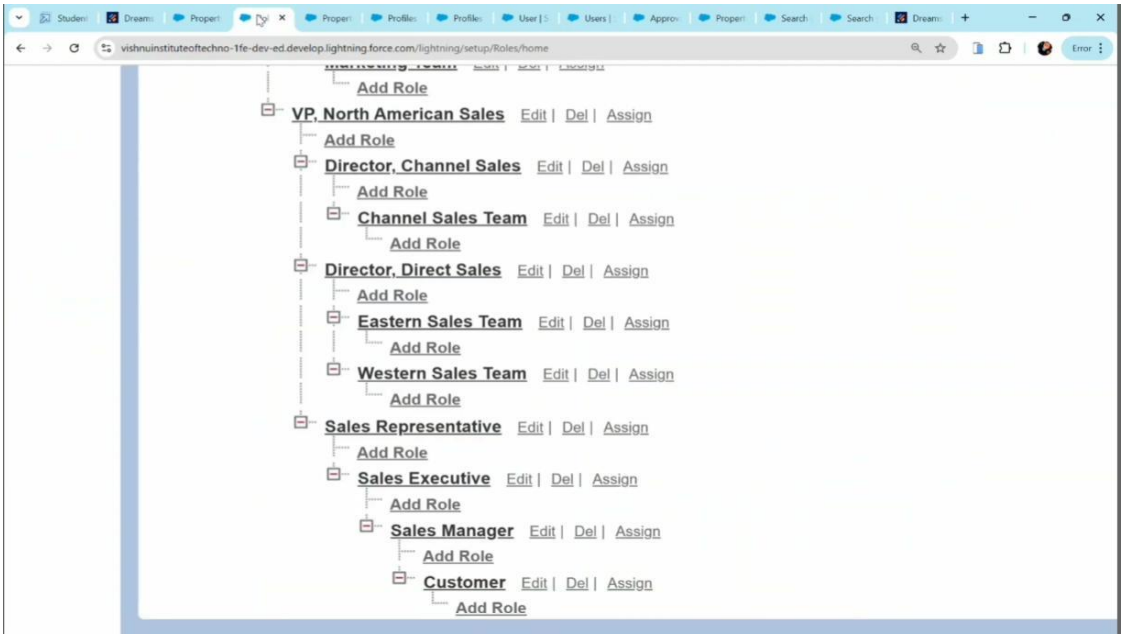


Create Roles:

Create Roles as per business requirenment

Sales Executive Role:

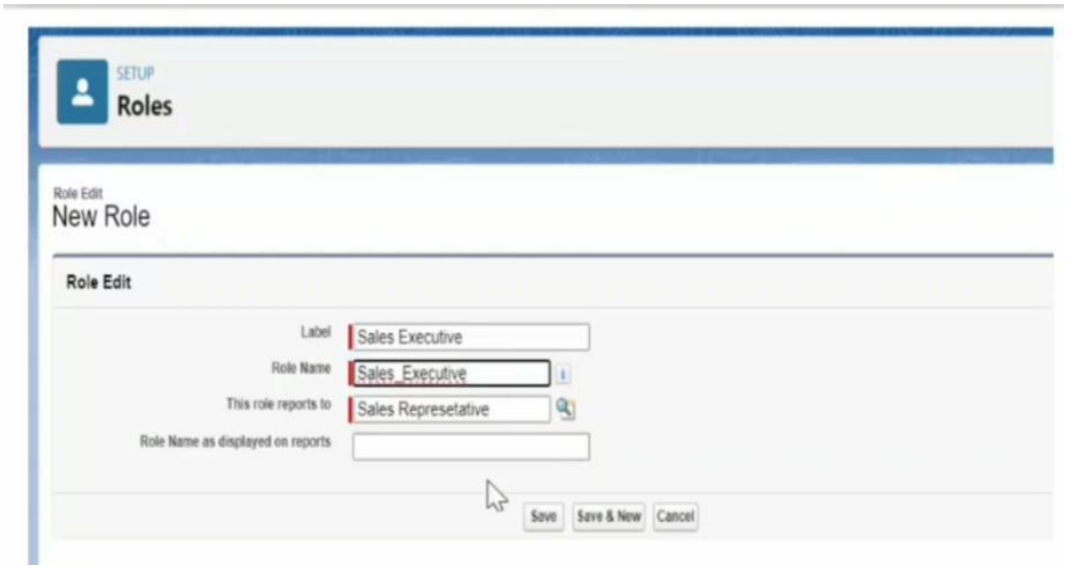
1) Go to Setup and Click on Roles, then click on Expand all and Add a Role just below the Sales Representative.



* It will use the “System Administrator Profile”.

2) Label - Sales Executive

Reports to - Sales Representative



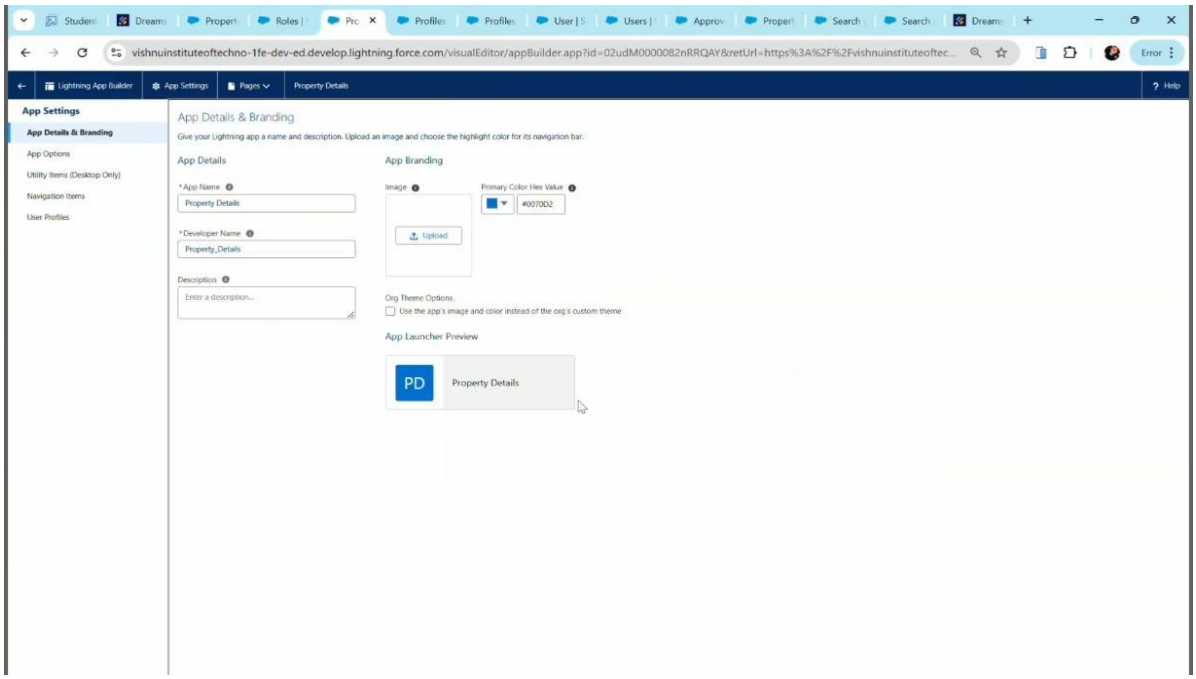
- Similarly Create a Role Name “Sales Manager” below Sales Executive which reports to Sales Executive, Also Add a Role below Sales Manager labeled as “Customer” which reports to Sales Manager.

Create a Property Details App:

An App where the objects will be displayed

Activity 1:

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



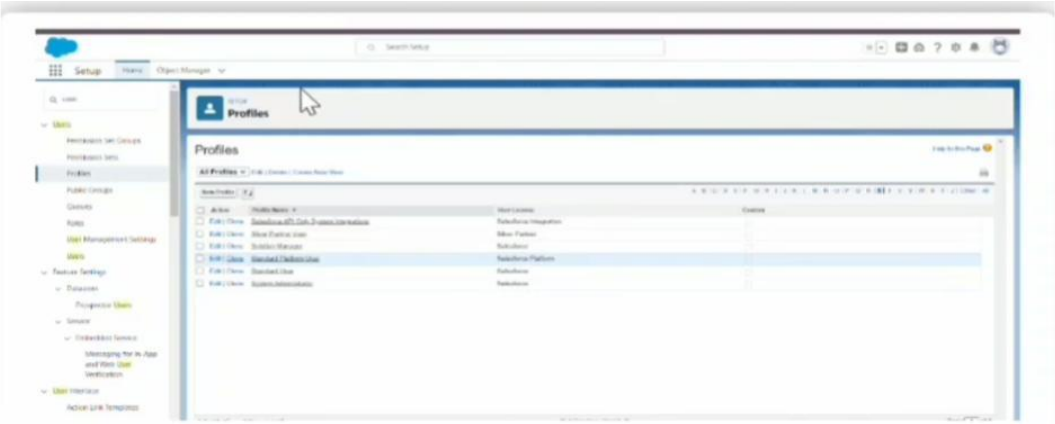
1)Click Next >> Next >> Save and Add “System Admin ”Profile.

Create Profiles:

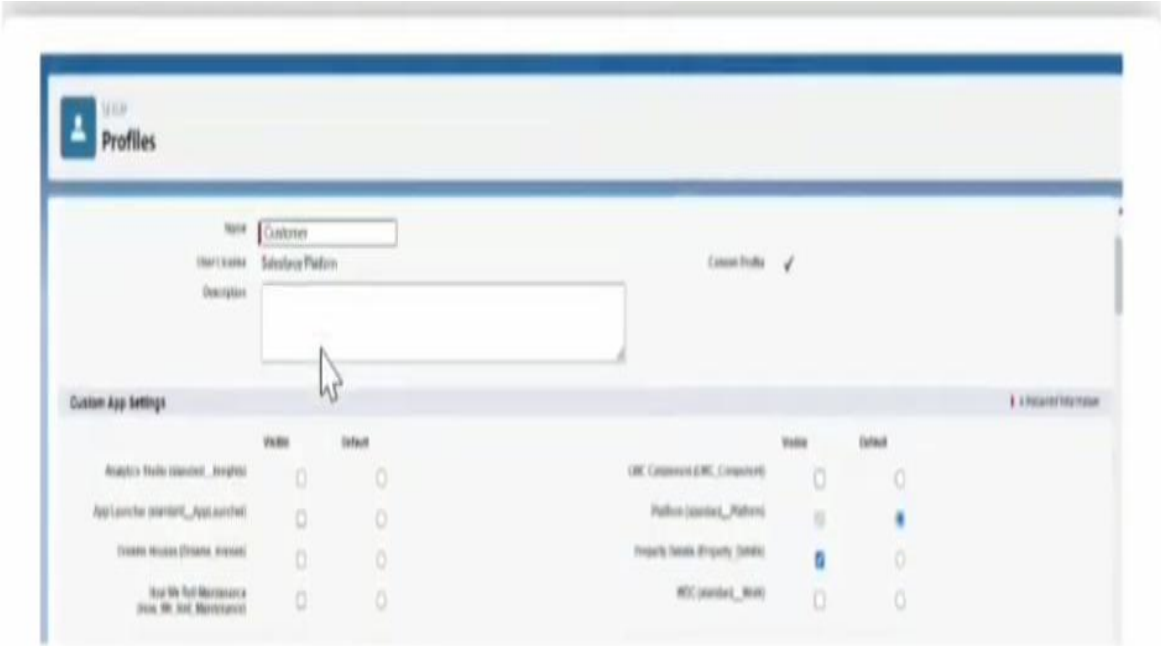
Create profiles as per business requirement

Customer

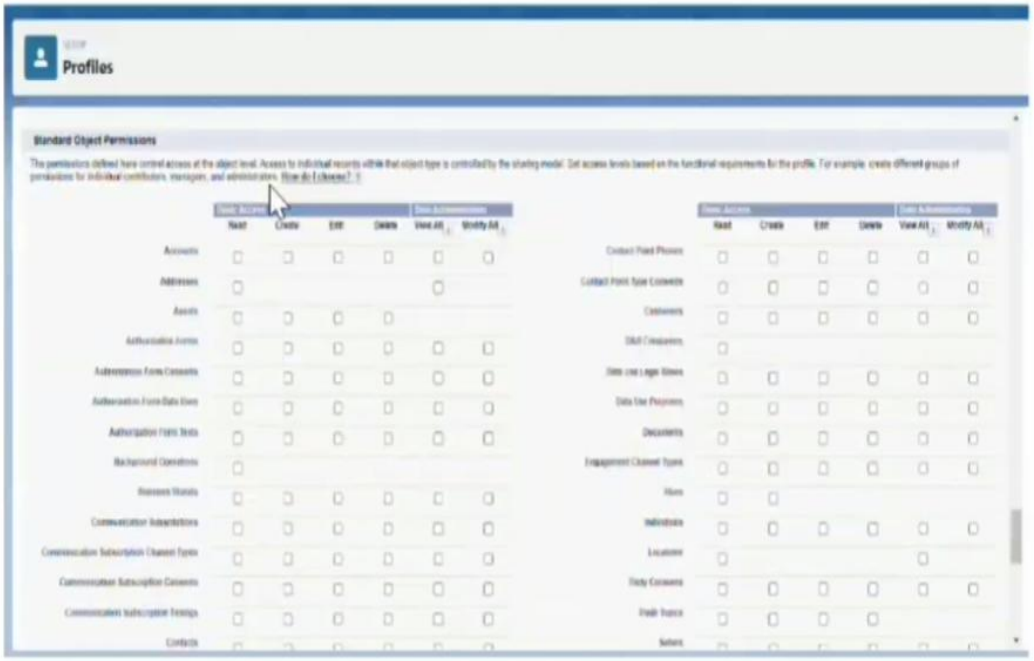
1. From Setup >> Go to Profiles and Clone Salesforce Platform User and Name it “Customer”..



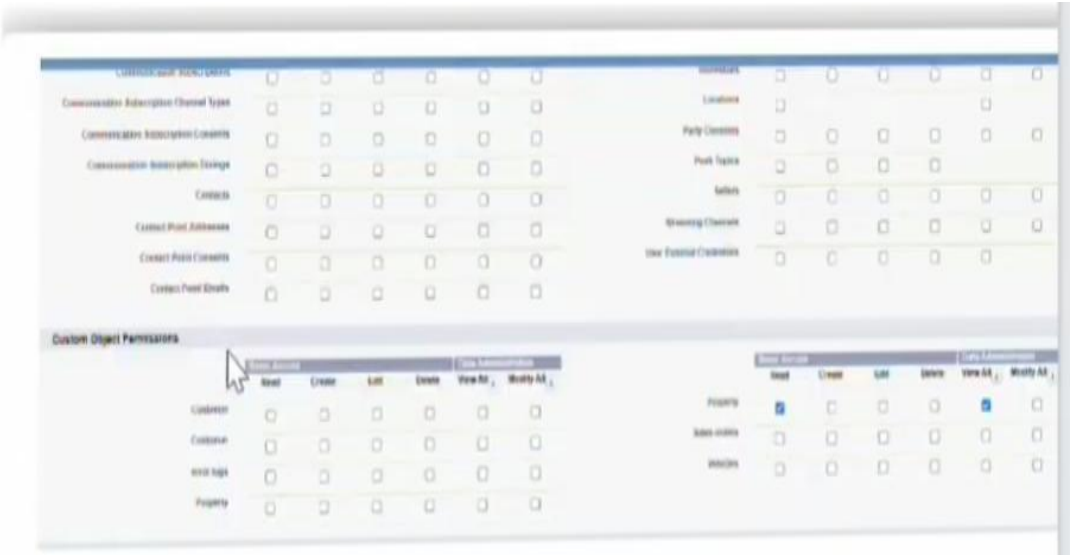
2. Uncheck all the Custom Objects and Check only Property Details From Custom App Settings.



3. Also Remove all the Standard Object Permissions.



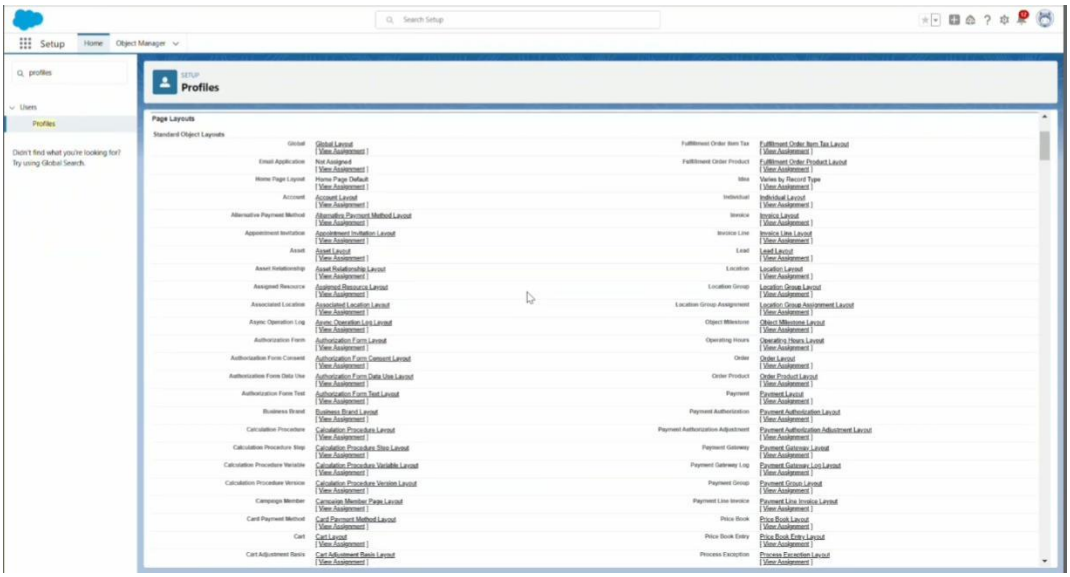
4. Uncheck all the Custom Object Permissions and check read and view all in “Property”



Manager

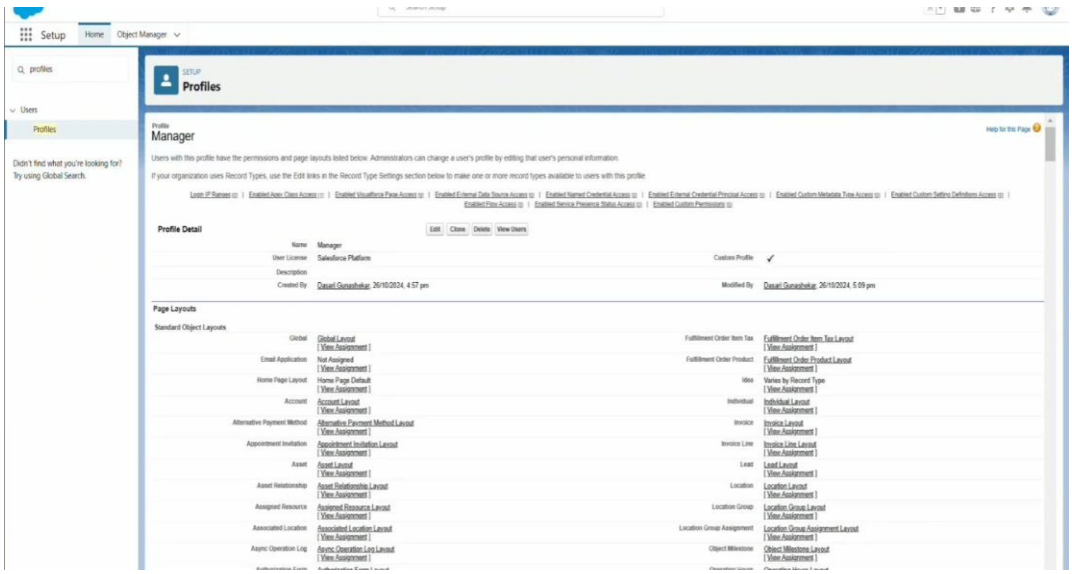
1) From Setup >> Go to Profiles and Clone Salesforce Platform User and Name it “Manager”..

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



3. Also Remove all the Standard Object Permissions.

4. Uncheck all the Custom Object Permissions and check only “modify all” from “Property” and “Customer”



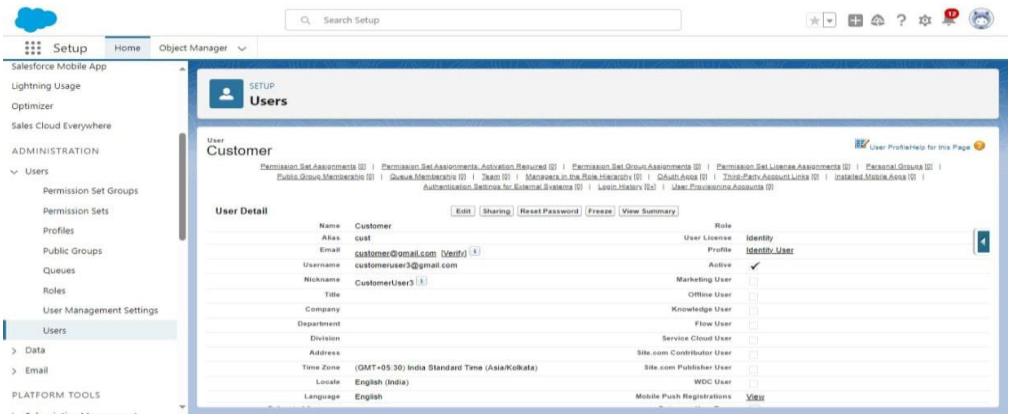
Create a Check Box field on user:

Create Field on the User as per the business requirement.

Activity 1:

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

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



Create Users:

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

User 1:

1. Go to Setup --> Administration --> Users --> New User
2. Last Name - Executive
3. Role - Sales Executive
4. License - Salesforce
5. Profile - System Administrator
6. Save

User 2:

1.Go to Setup >> Administration >> Users >> New User

2.Last Name >> Manager

3.Role >> Sales Manager

4.License >> Salesforce Platform

5.Profile >> Manager

6.Save

User 3:

1.Go to Setup >> Administration >> Users >> New User

2.Last Name >> Customer

3.Role >> Customer

4.License >> Salesforce Platform

5.Profile >> Customer

6.Make Sure the verified check box is “Unchecked”

7.Save

User 4:

1.Go to Setup >> Administration >> Users >> New User

2.Last Name >> Customer2

3.Role >> Customer

4.License >> Salesforce Platform

5.Profile >> Customer

6.Make Sure the verified check box is “checked”

7.Save

Create an Approval Process for Property Object:

An Approval process to approve or reject the records as according.

Activity 1:

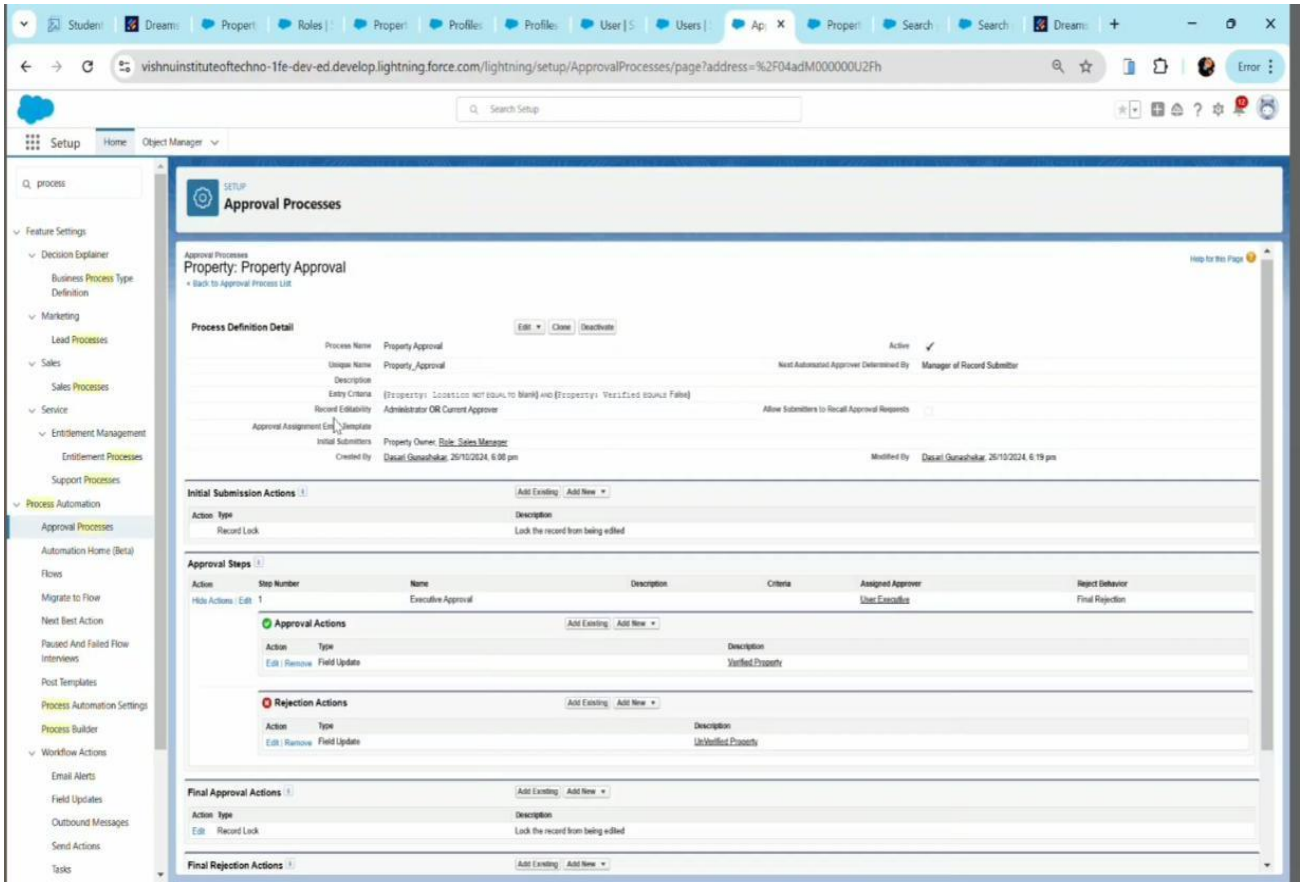
1.From Setup >> Process Automation >> Approval Process

2.Process Name - Property Approval

3)Give 2 criteria -

a. Location is not equal to blank,

b. Verified Equals false.



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

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

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

7) Click Next and Select the initial Submiters >>

a) Owner >> Property Owner

b) Roles >> Sales Manager

8) Save.

9) Add an approval step name “Executive Approval ”

10) specify the Criteria >> All record should enter.

11) click next and select the Approver as “ Sales Executive “ and “Save”

12) Add One field Update as “Verified Property”

a. Select Object >> Property
b. Field to Update >> Verified
c. Field Data Type >> CheckBox
d. Select CheckBox Option as “True”
e. Save.

13) Add One field Update as “UnVerified Property”

a. Select Object >> Property
b. Field to Update >> Verified
c. Field Data Type >> CheckBox
d. Select CheckBox Option as “False”
e. Save.

14) Activate the Approval Process.

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

A flow that can submit the records directly for approval.

Activity 1

1.From Setup >> Search for Flows >> Click On New and Select “Record Trigger Flow”.

2.Select Object >> Property

3.Select “Trigger the flow when” >> “A record is created”

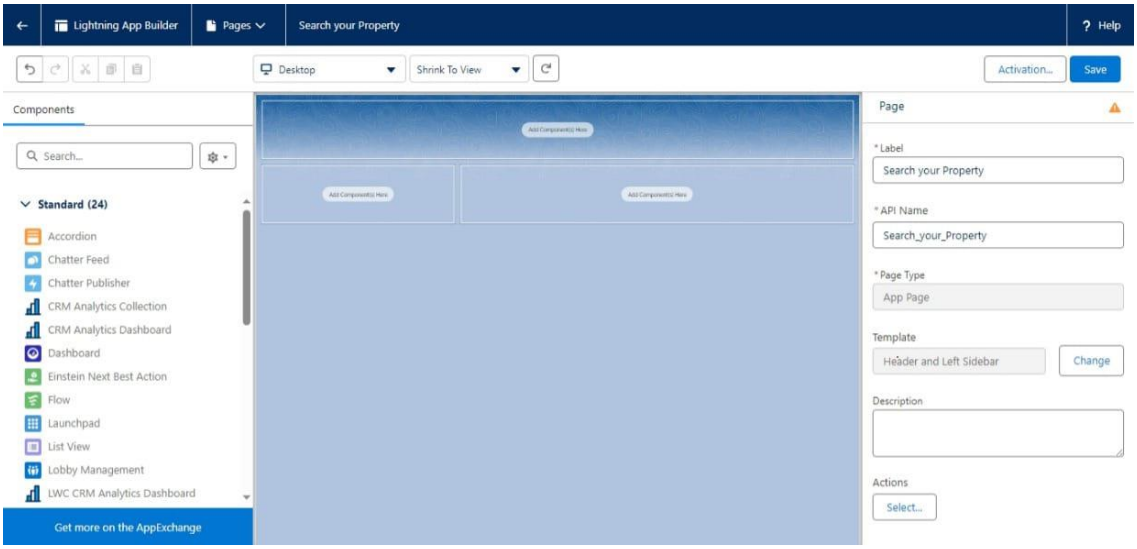
4.Set Entry Conditions >> “None”

5.Add a “Action” >> “Submit for Approval”

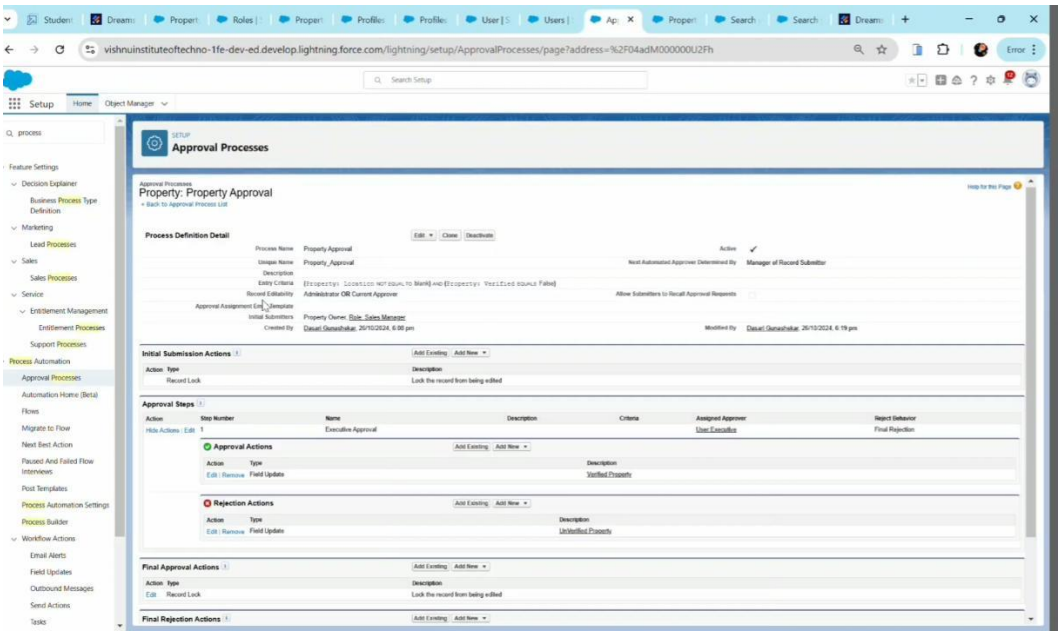
6.Give Label >> Approval for property

7.Record Id >> {!$Record.Id}

8.Done



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



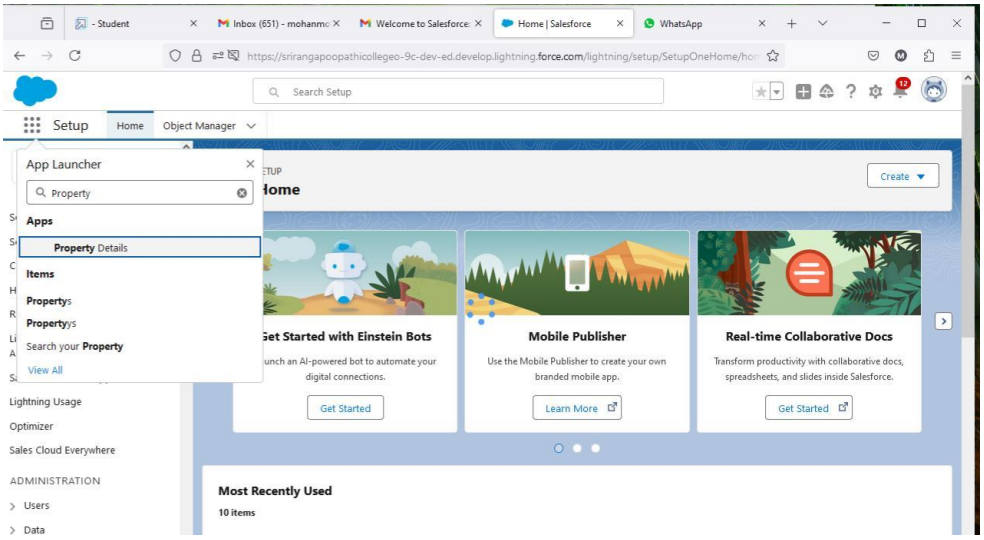
Create an App Page:

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

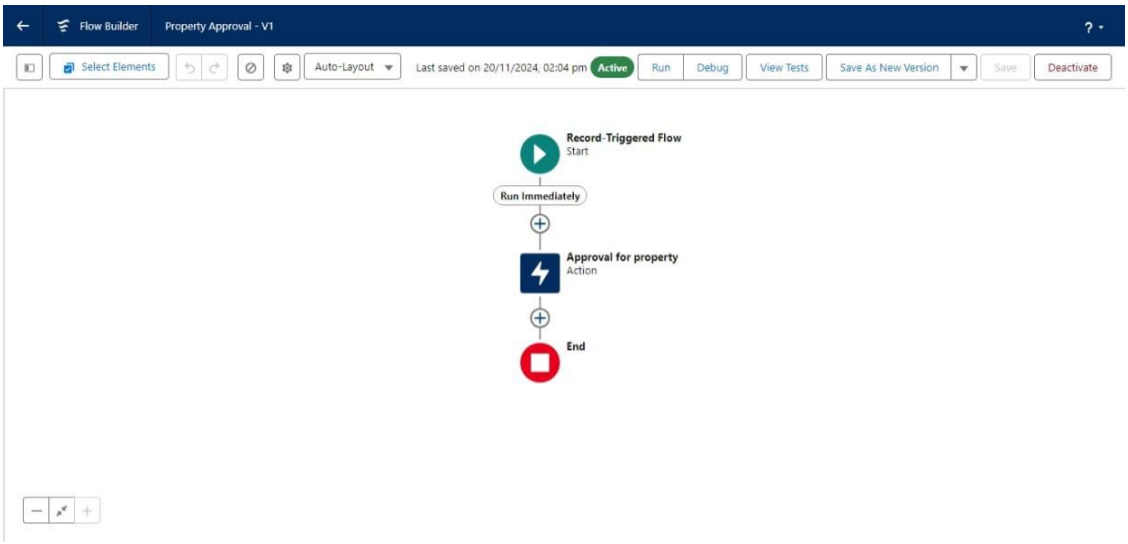
Activity 1:

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

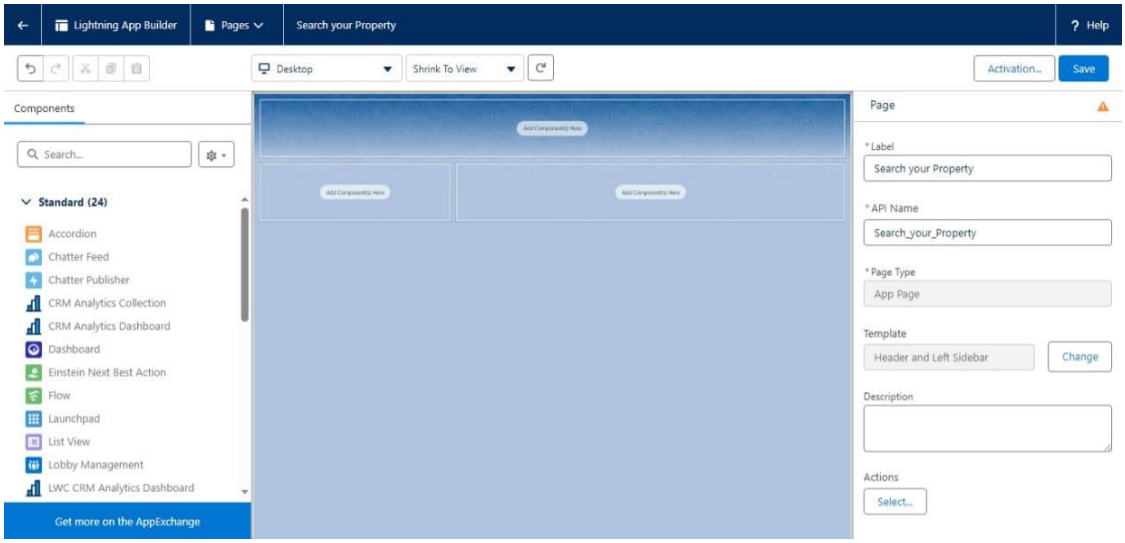
Click on Next.



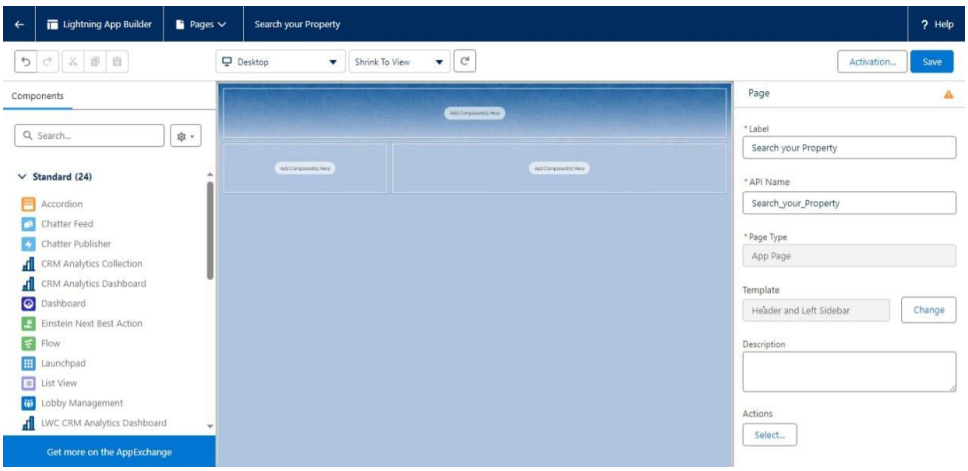
2.Give Label as “Search your Property” click “Next”.
3.Click “header and Left Sidebar” and Click on “Done”



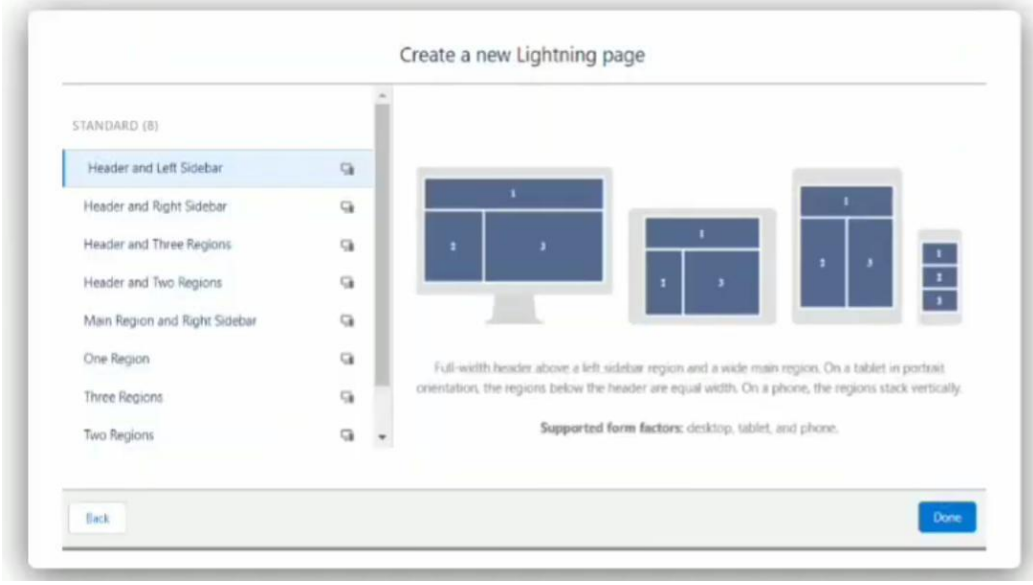
4.Click on “Save ” and then click on “Activate”.



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



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



7.Then Click on “Save”

Create a LWC Component:

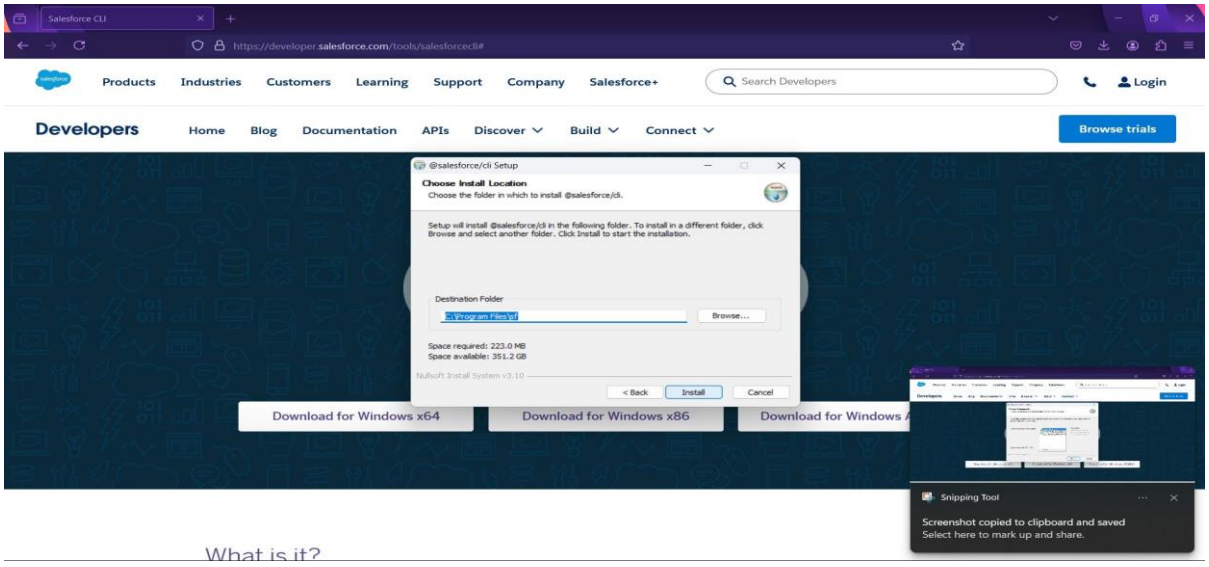
- Create an LWC Component for the customers so that only verified customers can access the verified properties and non Verified customers can access non verified properties, and deploy it on “Search your Property Page”

Activity 1:

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

Code: -

```
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];
    }
}
```



What is it?

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

3.Enter your login id and password to authorize your org.

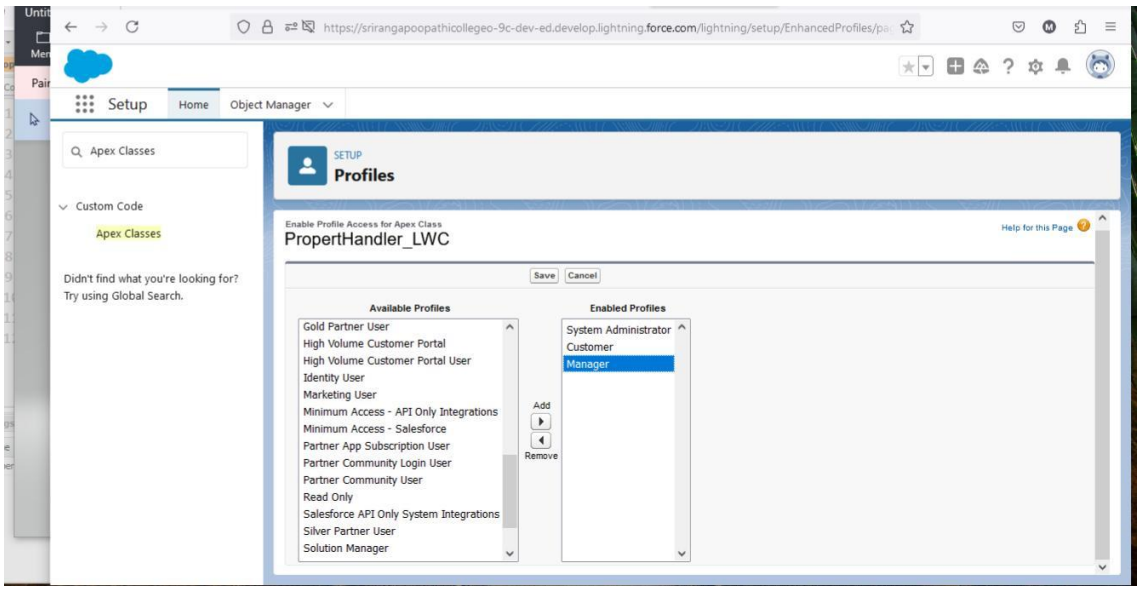
4.Now (ctrl+shift +P) and Create a lightning Web Component and Name it Anything you want to. (Example -)

5.In your Html File Write this code : -

Code :-

```
<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>
```

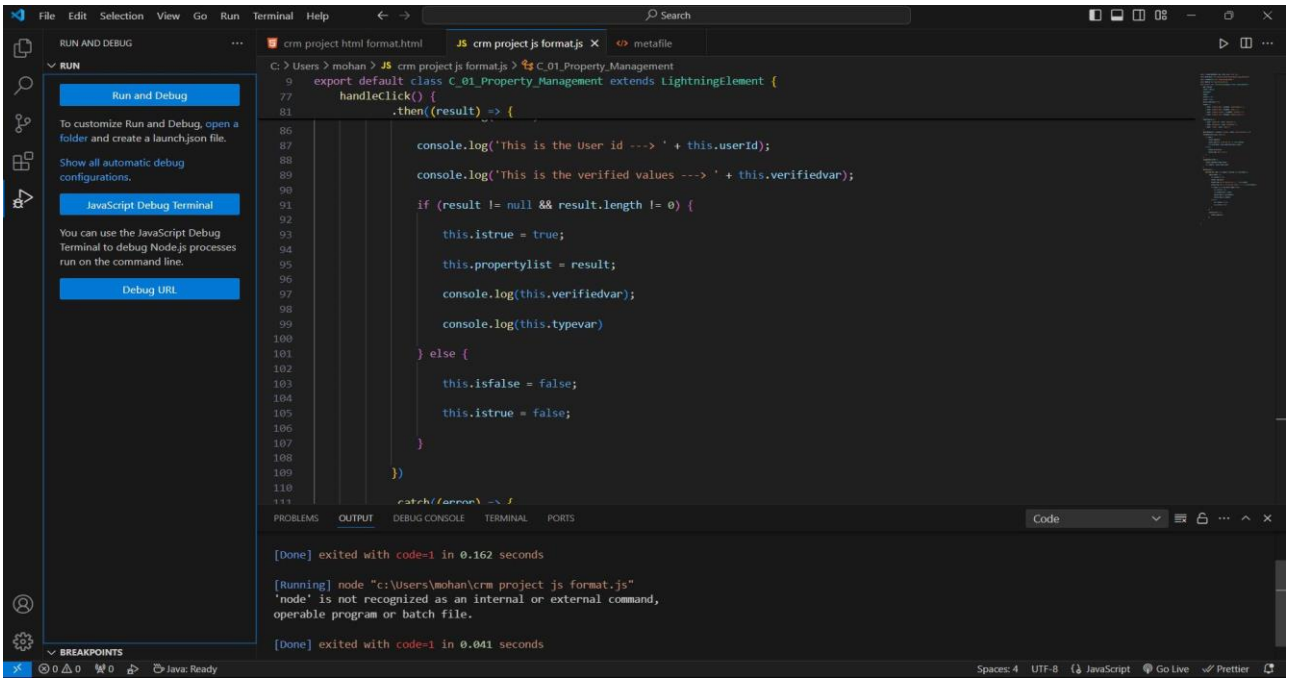


6. In Your Js File Write this code : -

Code :-

```
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;
```

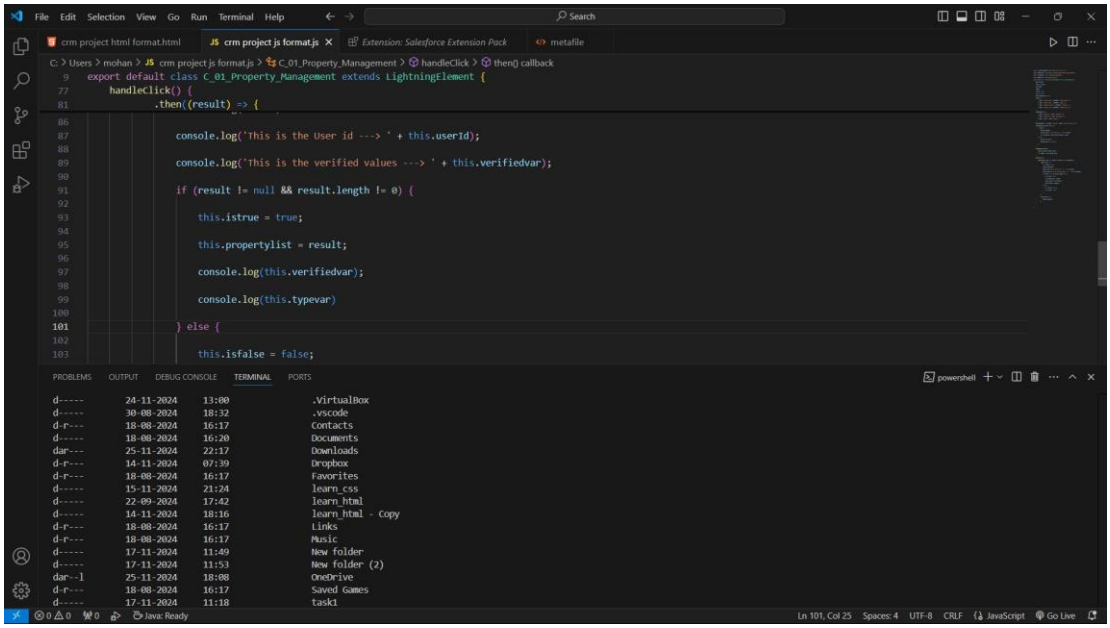
```
    } else {
      console.error(error)
      console.log('this is error')
    }
  }
  changehandler(event) {
    console.log(event.target.value);
    this.typevar = event.target.value;
  }
  handleClick() {
  getProperty({ type: this.typevar, verified: this.verifiedvar })
      .then((result) => {
        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)
      })
  }
}
```



7.In Your metafile give your targets to deploy the component.

Code :-

```
<?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>
```



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

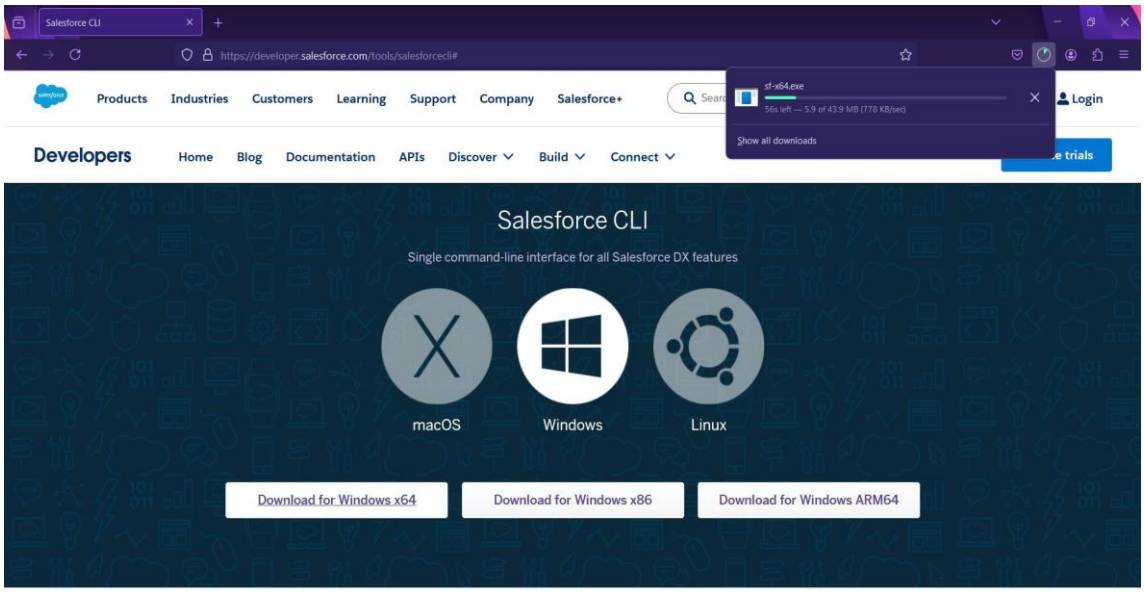
Drag this Component to your App Page:

Adding the Component to your Page.

Activity 1:

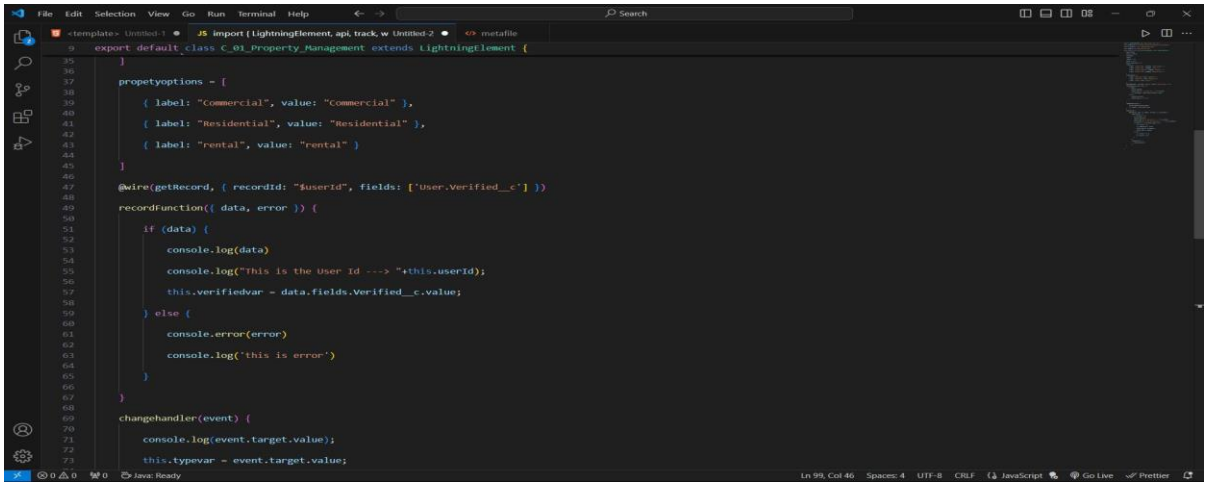
1.From Setup >> Go to App Launcher >> Search for Property Details

2.On this Page click on gear icon and click on Edit Page



What is it?

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



```
export default class C_01_Property_Management extends LightningElement {
    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;
```

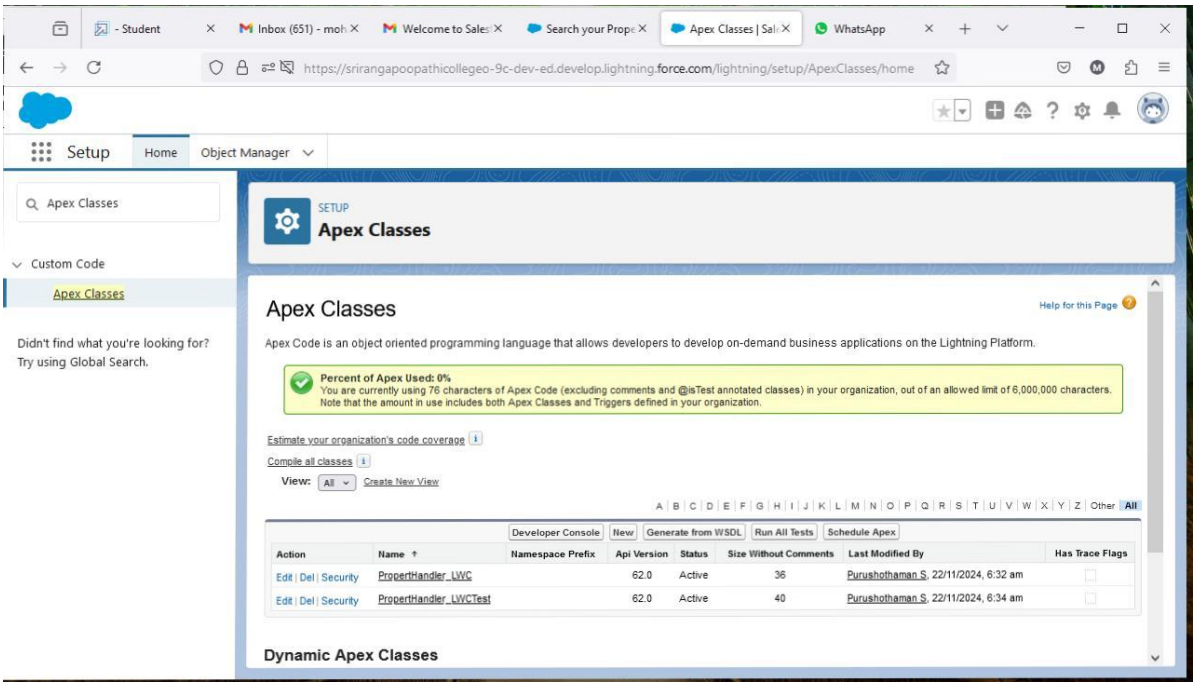
Give Access of Apex Classes to Profiles:

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

Activity 1:

1.From Setup >> Search For Apex Classes >> Click on “Security” behind “PropertyHandler__LWC”.

2.From Profiles Add “Manager” and “Customer” and “Save”.




Thank
You