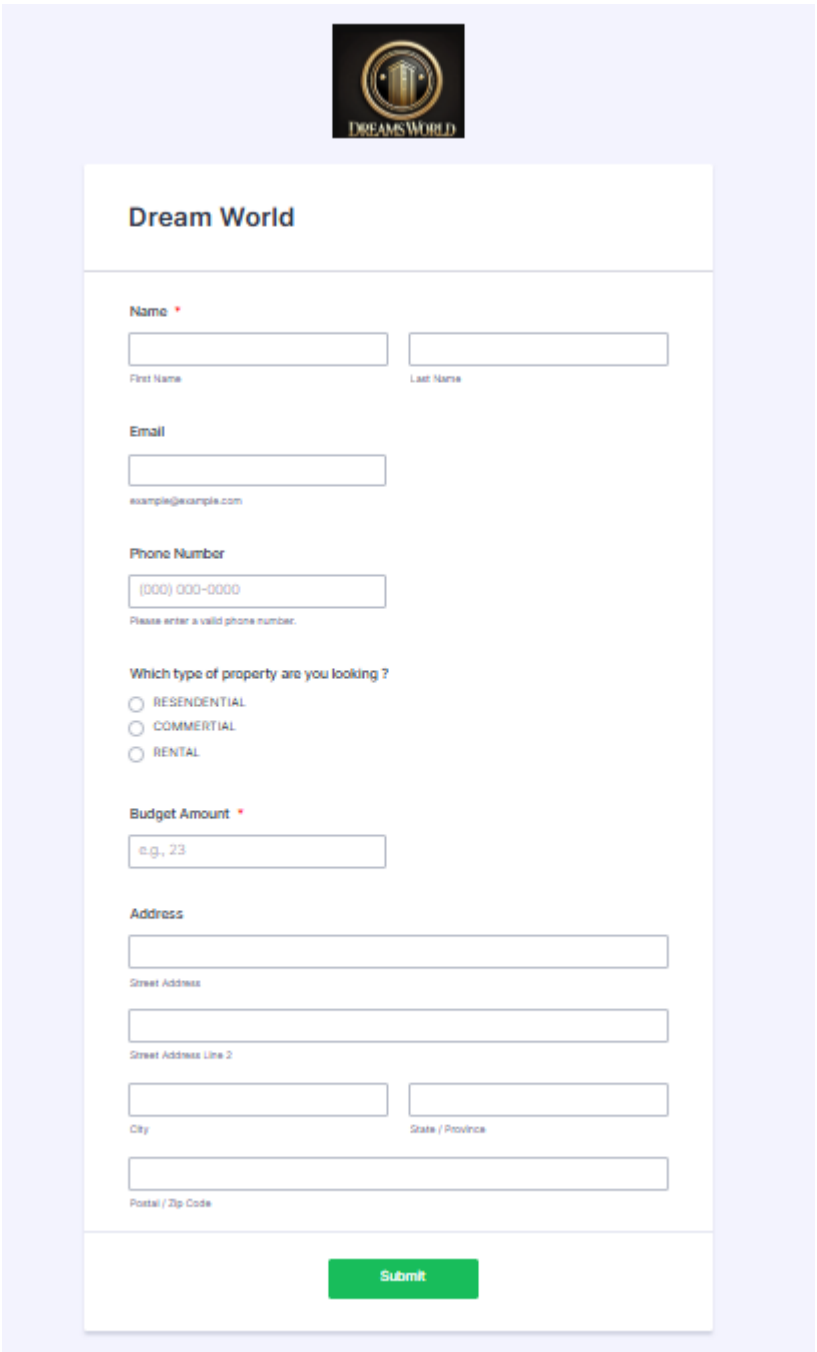
MILESTONE 1 :- CREATE A JOTFORM AND INTEGRATE IT WITH THE ORG TO CREATE A RECORD OF CUSTOMERS AUTOMATICALLY.

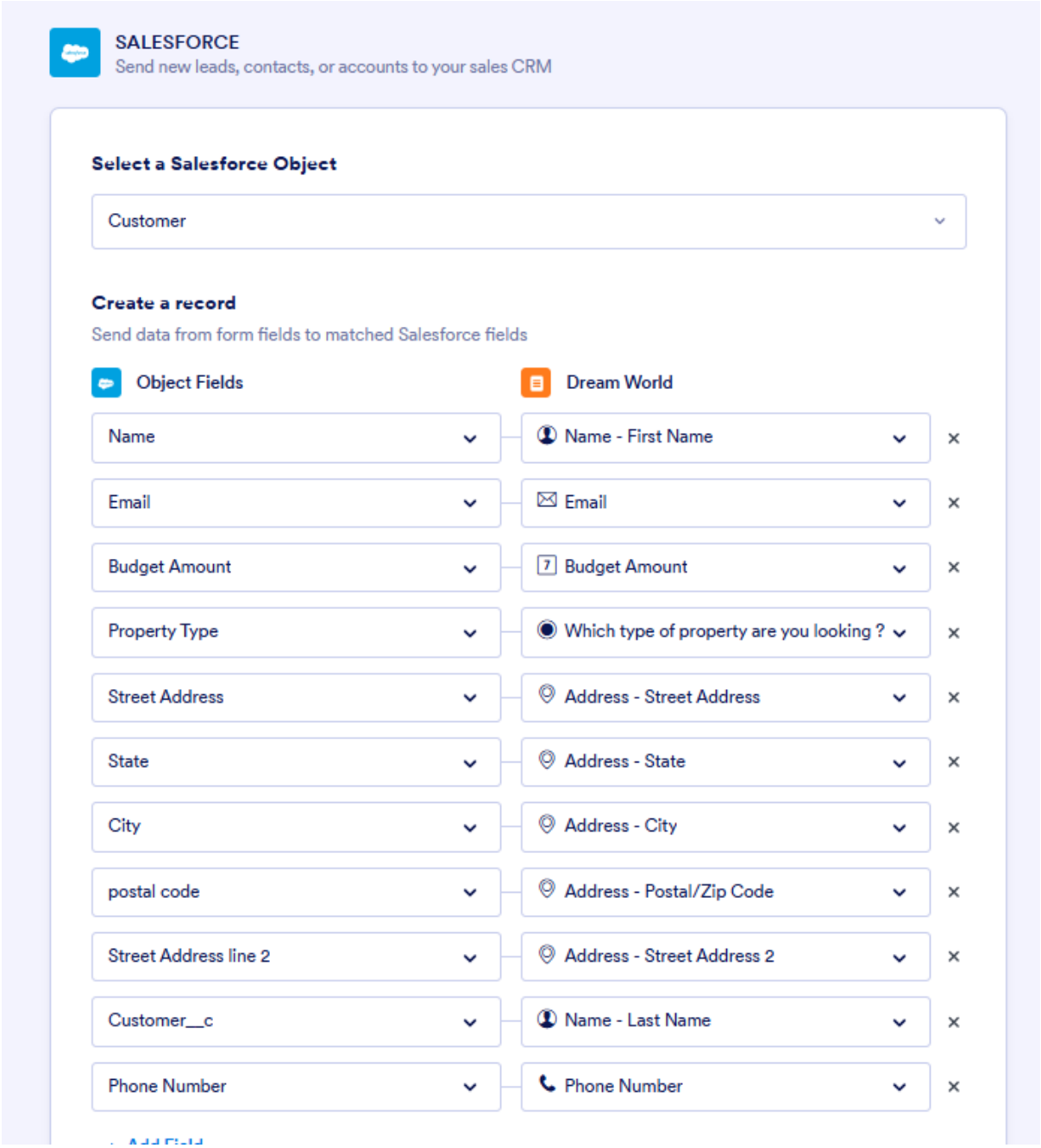


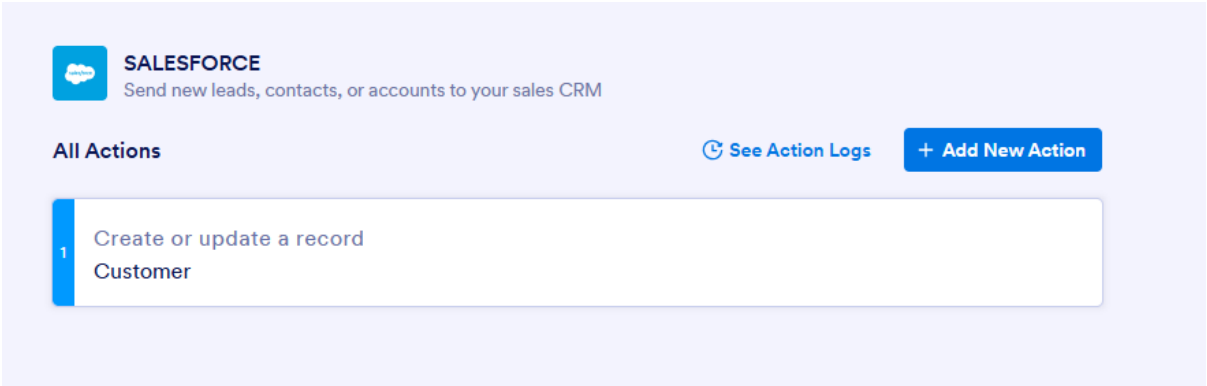
CREATE OBJECTS FROM SPREADSHEET.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer__c	Custom Object		20/12/2024	✓

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Property	Property__c	Custom Object		20/12/2024	✓

Integrate Jotform with Salesforce Platform





Create Roles

Create Roles as per business requirenment

Create a Property Details 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
Property Details

* Developer Name
Property_Details

Description
Enter a description...

App Branding

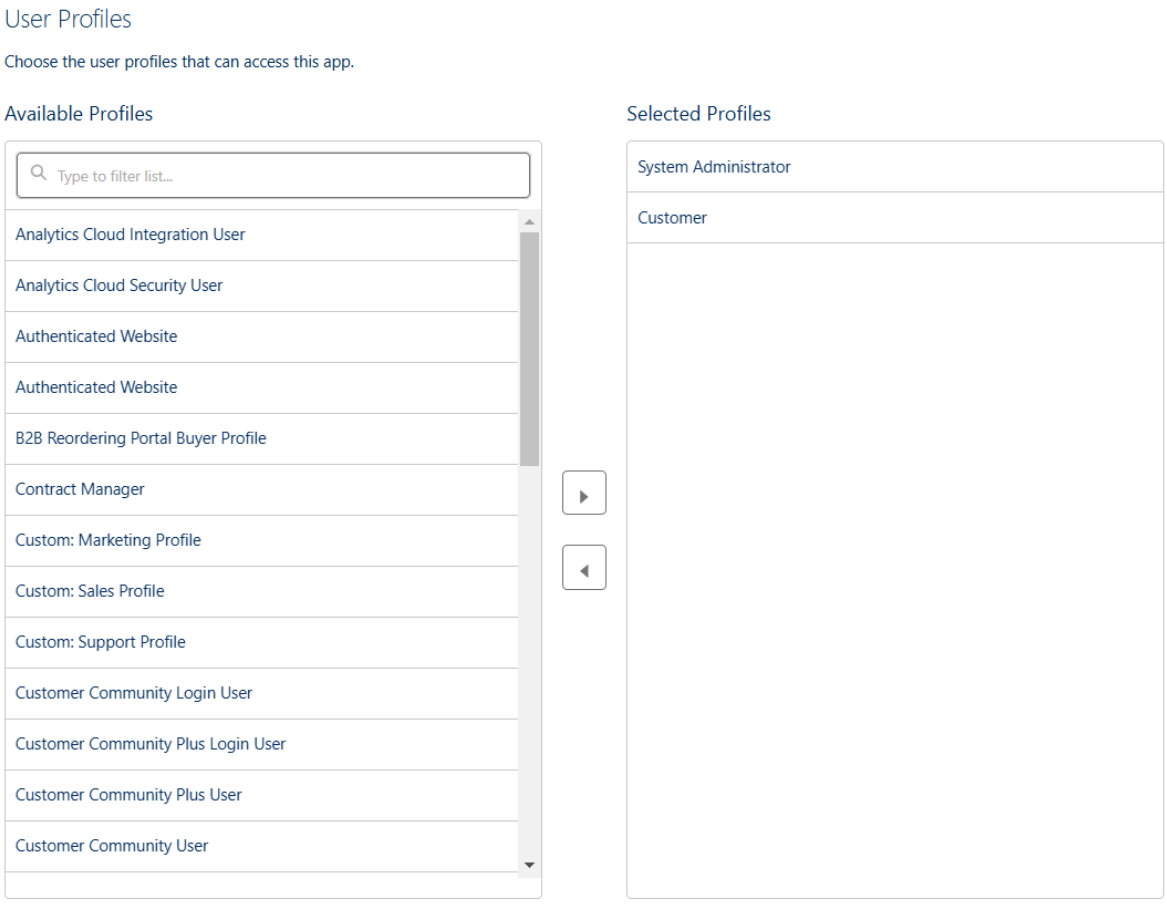
Image
Upload

Primary Color Hex Value
#CFD73D

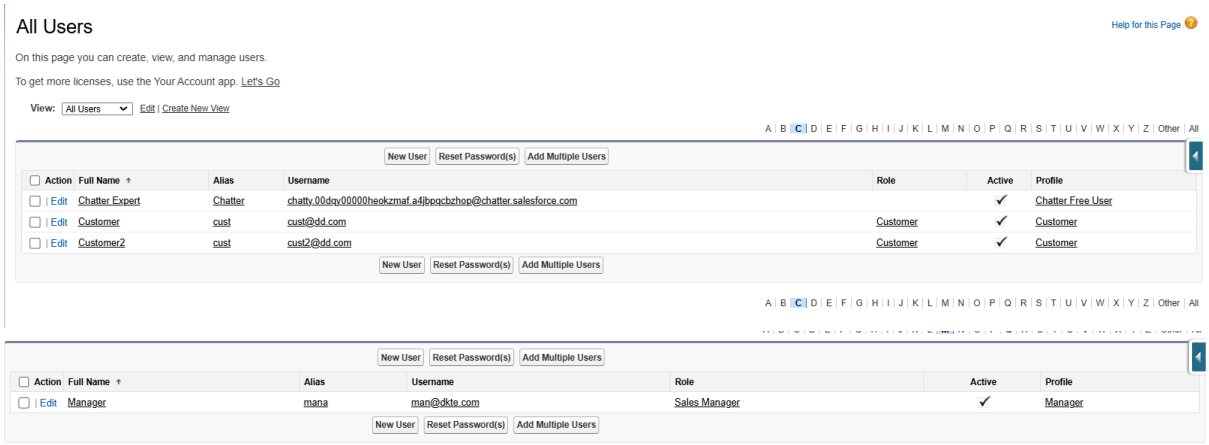
Org Theme Options
Use the app's image and color instead of the org's custom theme

App Launcher Preview

PD Property Details

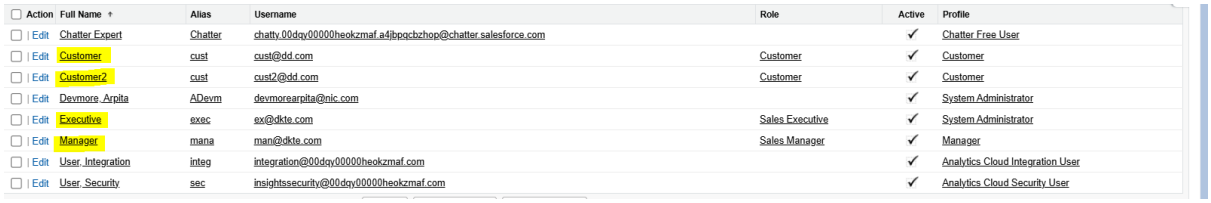


Create Profiles



Create a Check Box field on user

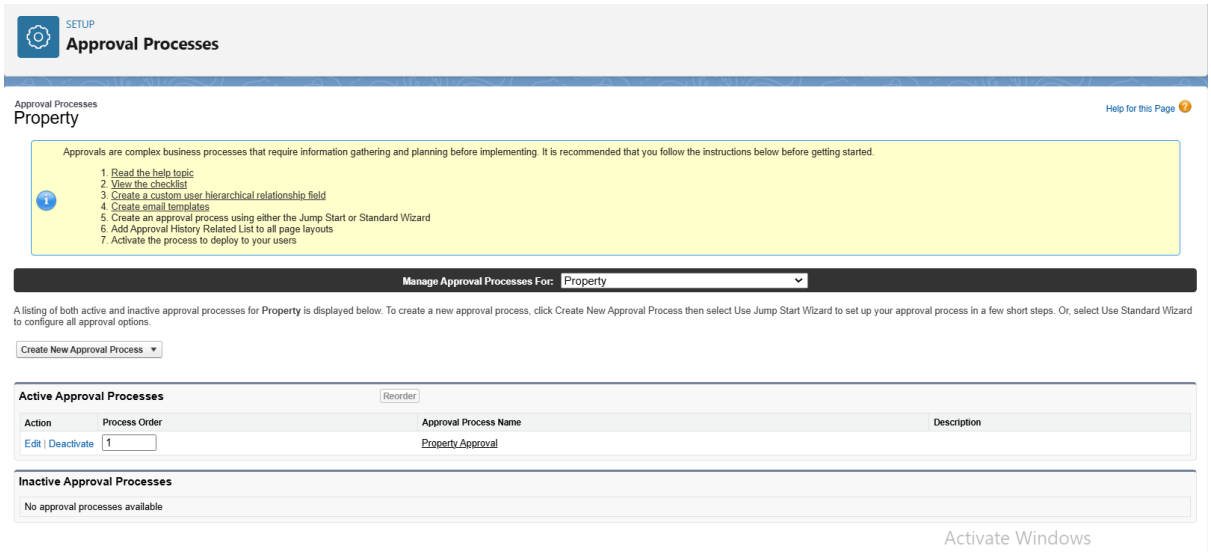
Create Users



Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00dqy00000heokzmaf.a4jbpqcbzhop@chatter.salesforce.com		✓	Chatter Free User
Edit	Customer	cust	cust@dd.com	Customer	✓	Customer
Edit	Customer2	cust	cust2@dd.com	Customer	✓	Customer
Edit	Devmore, Arpita	ADevm	devmorearpita@nic.com		✓	System Administrator
Edit	Executive	exec	ex@dkte.com	Sales Executive	✓	System Administrator
Edit	Manager	mana	man@dkte.com	Sales Manager	✓	Manager
Edit	User, Integration	integ	integration@00dqy00000heokzmaf.com		✓	Analytics Cloud Integration User
Edit	User, Security	sec	insightssecurity@00dqy00000heokzmaf.com		✓	Analytics Cloud Security User

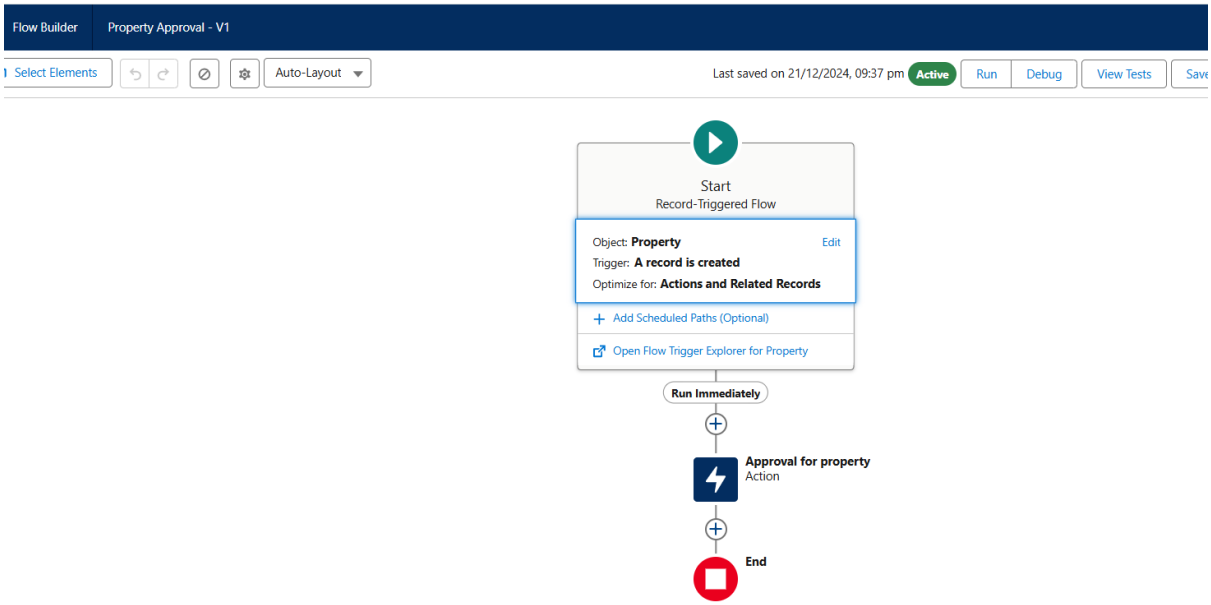
Heighted users

Create an Approval Process for Property Object

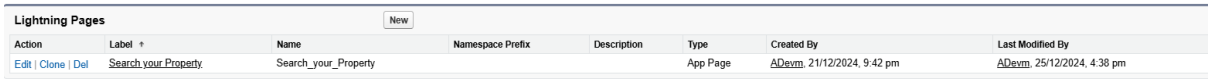


Create a Record trigger flow to submit the Approval Process Automatically.

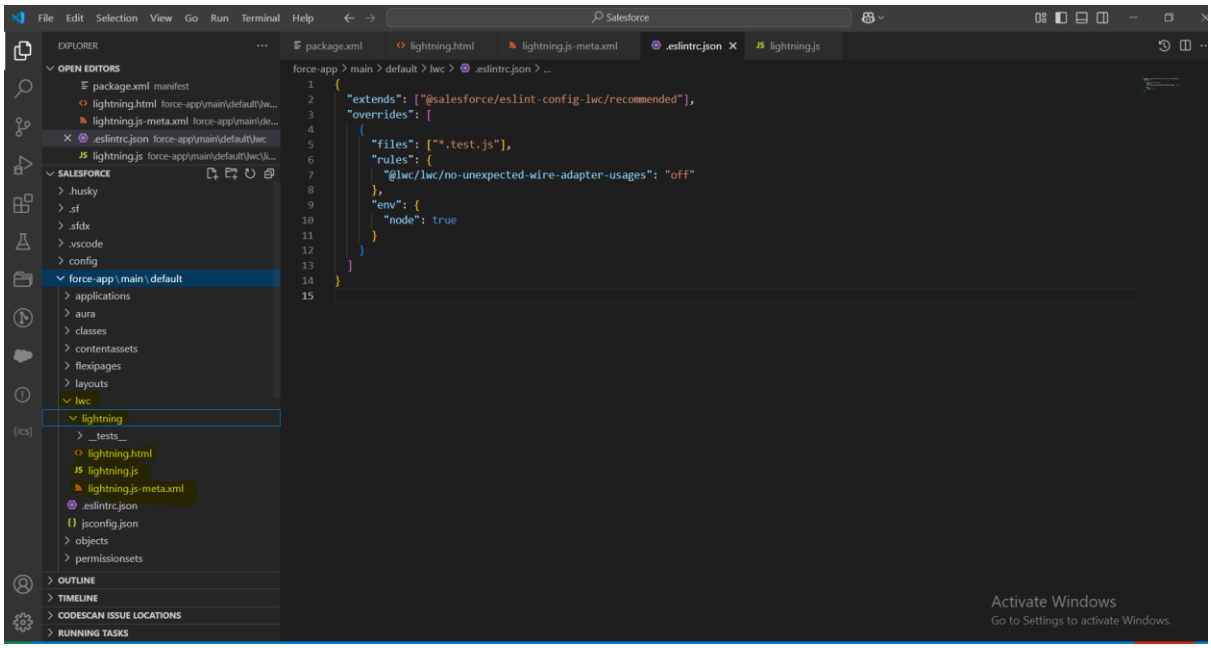
Property Approval	Autolaunched Flow	☑	☐	Unmanaged	Arpita Devmore	21/12/2024, 9:37 pm



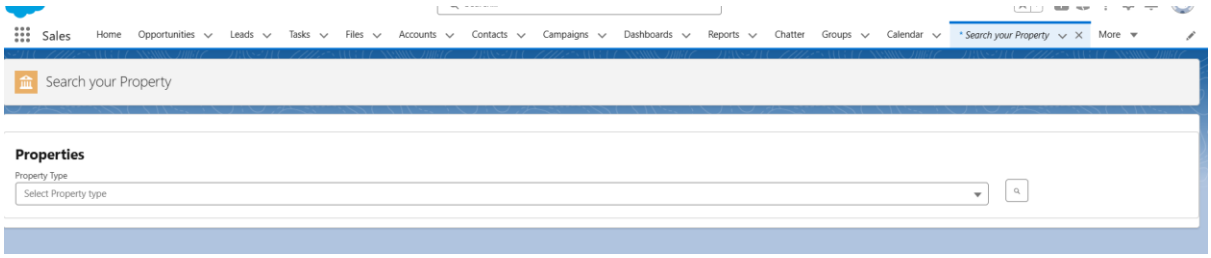
Create an App Page



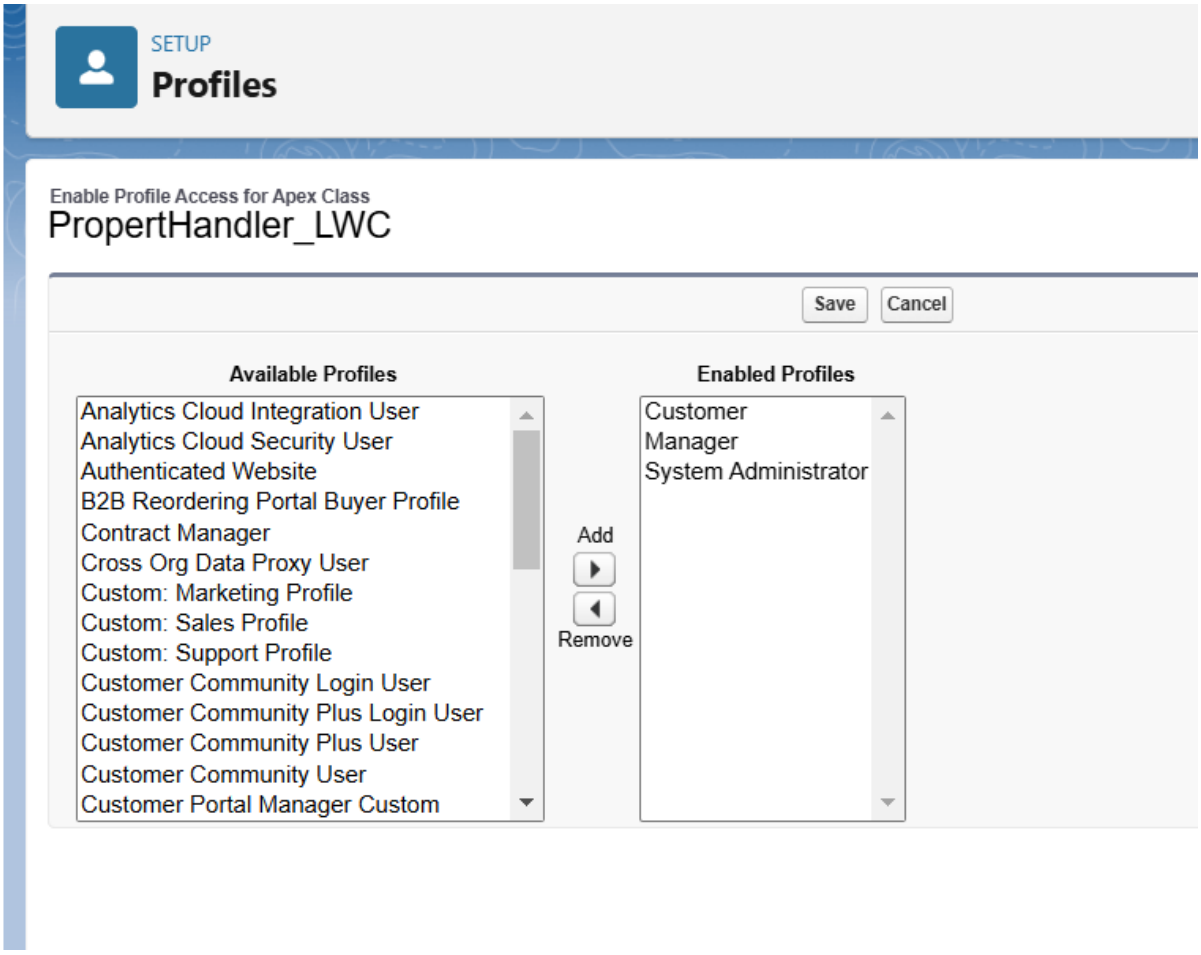
Create a LWC Component



Drag this Component to your App Page



Give Access of Apex Classes to Profiles



Dynamic Apex Classes

Dynamic Apex extends your programming reach by interacting with Lightning Platform components.