

Project Title

A CRM Application to Handle Clients and Their Property-Related Requirements

1. Project Overview

This project is focused on building a CRM application designed to streamline client interactions and property management. The primary objective is to address challenges related to client communication, property tracking, and requirement fulfillment. By leveraging modern CRM technologies, the application aims to enhance operational efficiency, improve user experience, and ensure accurate data management.

The solution will cater to the needs of real estate agents and property managers while supporting the long-term goals of the organization in providing superior client services.

2. Objectives

Business Goals:

- Efficiently manage client information and their property-related requirements.
- Provide a seamless platform for tracking property availability and status.
- Facilitate effective communication between clients and agents.

Specific Outcomes:

- **Client Management:** Enable easy storage, retrieval, and update of client information.
- **Property Tracking:** Maintain detailed records of properties, including availability, features, and pricing.
- **Automated Workflow:** Streamline repetitive tasks like follow-ups, reminders, and updates.
- **Analytics and Reporting:** Offer insights into client behavior and property performance.

3. Key Features and Technologies Utilized

Core Features:

- **Client Profiles:** Comprehensive profiles with contact details, preferences, and requirements.
- **Property Listings:** Detailed information about properties, including multimedia attachments.
- **Search and Filter:** Advanced search capabilities for finding properties matching client needs.
- **Task Automation:** Auto-reminders for follow-ups and scheduled activities.
- **Dashboard:** A centralized view for tracking overall operations and activities.

Technologies:

- Salesforce Platform (including Lightning Web Components and Apex Classes).
- Jotform Integration.

4. Detailed Steps to Solution Design

Milestone 1: Create a Jotform and Integrate with Salesforce

1. **Jotform Integration:**

- Created a Jotform to collect customer data.
- Integrated Jotform with Salesforce to automatically create customer records.

2. **Objects and Roles:**

- Created Salesforce objects based on spreadsheet data for customers and properties.
- Defined user roles to establish clear access levels.

3. **Property Details App:**

- Built a custom Property Details App to manage property-related records.

4. **Profiles and Users:**

- Created profiles with custom access levels.
- Added a checkbox field on the User object for additional configuration.
- Created user records for system access.

5. **Approval Process:**

- Created an Approval Process for the Property object to streamline property validation.
- Configured a record-triggered flow to automatically submit property records for approval.

6. **Lightning App Page:**

- Designed a custom App Page for the Property Details App.
- Added a Lightning Web Component (LWC) to the page.
- Ensured seamless interaction by dragging the component to the App Page.

7. **Apex Class Access:**

- Configured access to Apex Classes for all required profiles.

5. Testing and Validation

Testing Approach:

- **Unit Testing:** Validated individual components, such as Jotform integration and flows.
- **Integration Testing:** Ensured seamless data flow between Jotform and Salesforce.
- **User Interface Testing:** Verified the functionality of the App Page and LWC Component.

6. Key Scenarios Addressed by the CRM Application

- Automated creation of customer records through Jotform integration.
- Dynamic property management through the custom Property Details App.
- Simplified approval workflows for property records.
- Intuitive UI for agents using the Lightning App Page with LWC.
- Role-based access to ensure secure and efficient data handling.

7. Conclusion

Summary of Achievements:

The CRM application successfully enhances client and property management by integrating Jotform, automating workflows, and providing robust UI components. Key milestones achieved include automatic customer record creation, role-based user management, property tracking, and streamlined approval processes.

