


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



Dream 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 ?

☐ RESENTENTIAL

☐ COMMERTIAL

☐ RENTAL

Budget Amount *

e.g., 23

Address

Street Address

Street Address Line 2

City

State / Province


Postal / Zip Code

Submit

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




SALESFORCE
Send new leads, contacts, or accounts to your sales CRM

Select a Salesforce Object

Customer

Create a record

Send data from form fields to matched Salesforce fields

 Object Fields

Name

Email

Budget Amount

Property Type

Street Address

State


City


postal code


Street Address line 2


Customer__c


Phone Number


 Dream World


 Name - First Name


 Email


 Budget Amount


 Which type of property are you looking ?


 Address - Street Address


 Address - State

 Address - City

 Address - Postal/Zip Code

 Address - Street Address 2

 Name - Last Name

 Phone Number

x

x

x

x

x

x


x

x

x


x

x



SALESFORCE
Send new leads, contacts, or accounts to your sales CRM

All Actions

 See Action Logs

+ Add New Action


1

Create or update a record
Customer

SALESFORCE

Send new leads, contacts, or accounts to your sales CRM

All Actions

 See Action Logs

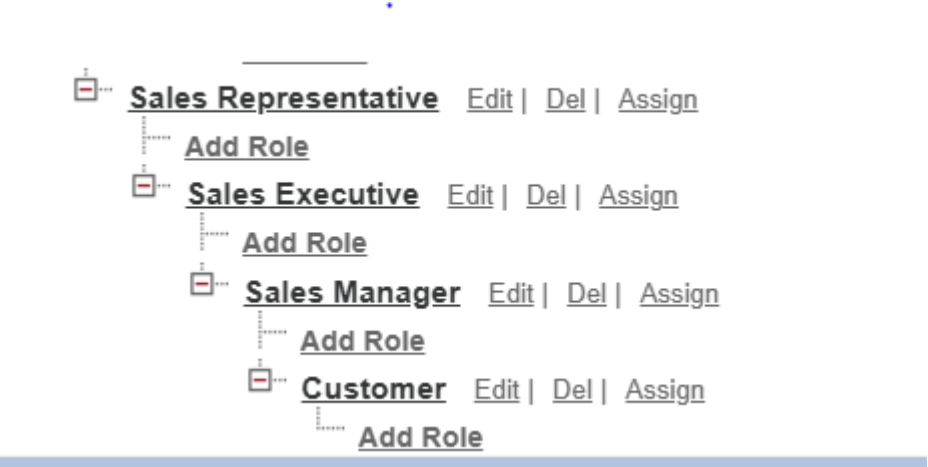
+ Add New Action

1

Create or update a record
Customer

Create Roles

Create Roles as per business requirement



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

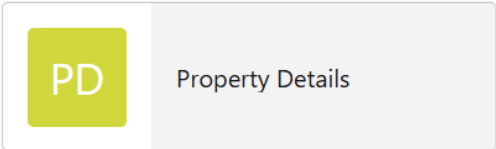
Primary Color Hex Value ⓘ

#CFD73D

Org Theme Options

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

App Launcher Preview



User Profiles

Choose the user profiles that can access this app.

Available Profiles

Analytics Cloud Integration User

Analytics Cloud Security User

Authenticated Website

Authenticated Website

B2B Reordering Portal Buyer Profile

Contract Manager

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

Selected Profiles

System Administrator

Customer

Create Profiles

All Users

[Help for this Page](#)

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users						
<input type="checkbox"/>	Action	Full Name	Alias	Username	Role	Active Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00doy00000heokzmaf.a4ibpqbzhop@chatter.salesforce.com		✓ Chatter Free User
<input type="checkbox"/>	Edit	Customer	cust	cust@dd.com	Customer	✓ Customer
<input type="checkbox"/>	Edit	Customer2	cust	cust2@dd.com	Customer	✓ Customer
New User Reset Password(s) Add Multiple Users						

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users						
<input type="checkbox"/>	Action	Full Name	Alias	Username	Role	Active Profile
<input type="checkbox"/>	Edit	Manager	mana	man@dkte.com	Sales Manager	✓ Manager
New User Reset Password(s) Add Multiple Users						

Create a Check Box field on user


Verified	Verified_c	Checkbox	Go to Settings to activate Windows.
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Create Users

<input type="checkbox"/>	Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00dqv00000heokzmaf.a4j@pqbzhop@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	Customer	cust	cust@dd.com	Customer	✓	Customer
<input type="checkbox"/>	Edit	Customer2	cust	cust2@dd.com	Customer	✓	Customer
<input type="checkbox"/>	Edit	Devmore Arpita	ADevm	devmorearpita@nic.com		✓	System Administrator
<input type="checkbox"/>	Edit	Executive	sxexc	sx@dkte.com	Sales Executive	✓	System Administrator
<input type="checkbox"/>	Edit	Manager	mana	man@dkte.com	Sales Manager	✓	Manager
<input type="checkbox"/>	Edit	User Integration	integ	integration@00dqv00000heokzmaf.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User Security	sec	insightssecurity@00dqv00000heokzmaf.com		✓	Analytics Cloud Security User

Heighted users

Create an Approval Process for Property Object

 **Approval Processes**

Approval Processes

Property

Help for this Page

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. Read the help topic

2. View the checklist

3. Create a custom user hierarchical relationship field

4. Create email templates

5. Create an approval process using either the Jump Start or Standard Wizard

6. Add Approval History Related List to all page layouts

7. Activate the process to deploy to your users

Manage Approval Processes For: Property

A listing of both active and inactive approval processes for Property is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

Active Approval Processes

Reorder

Action	Process Order	Approval Process Name	Description
Edit Deactivate	1	Property Approval	

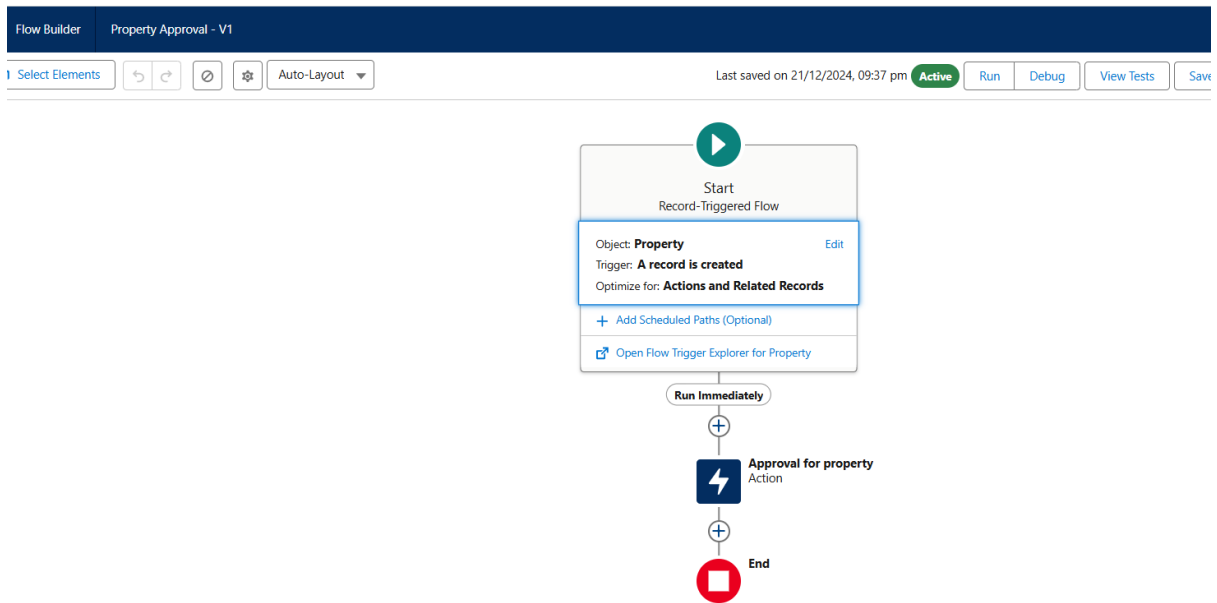
Inactive Approval Processes

No approval processes available

Activate Windows

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

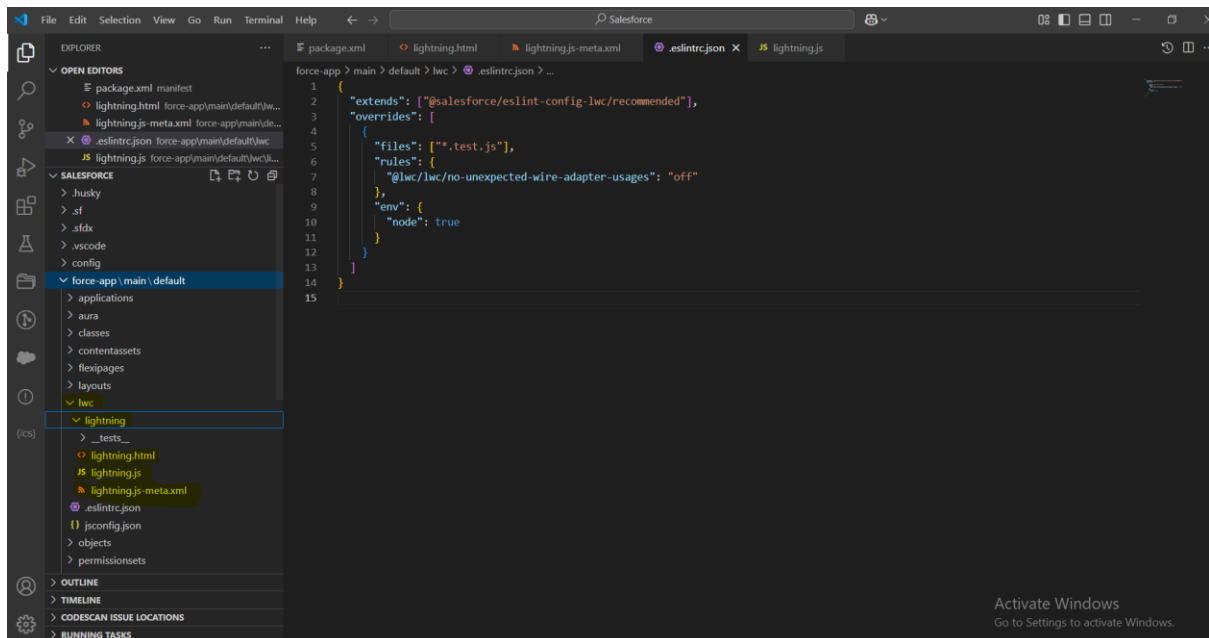
Property Approval	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Arpita Devmore	21/12/2024, 9:37 pm	<input type="checkbox"/>
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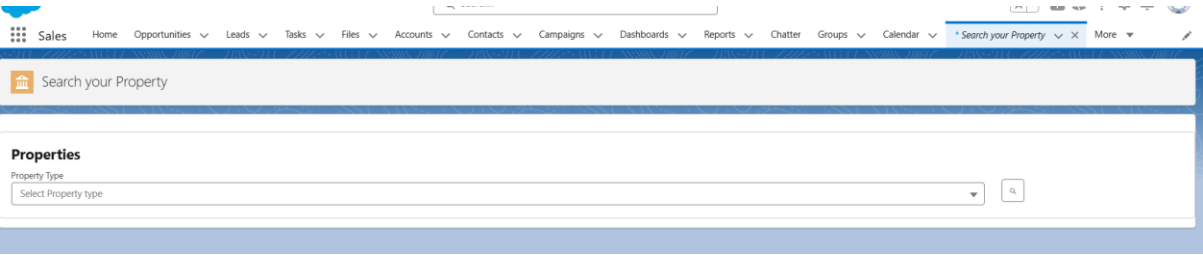
Create an App Page

Lightning Pages New						
Action	Label +	Name	Namespace Prefix	Description	Type	Created By
Edit Clone Del	Search your Property	Search_your_Property			App Page	ADevm: 21/12/2024, 9:42 pm
						Last Modified By ADevm: 25/12/2024, 4:38 pm

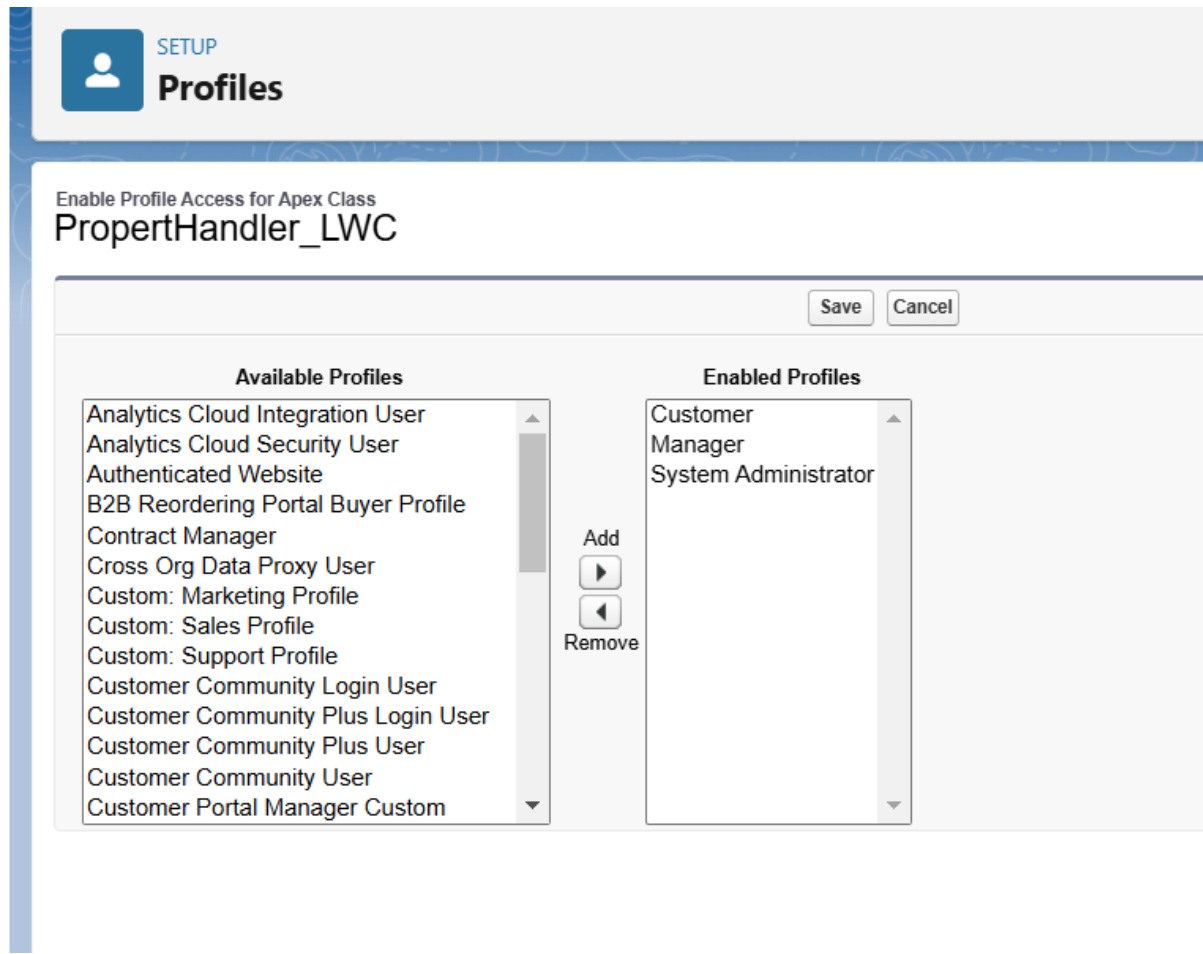
Create a LWC Component



Drag this Component to your App Page



Give Access of Apex Classes to Profiles



Estimate your organization's code coverage [x](#)

Compile all classes [x](#)

View: [All](#) [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [All](#)

Action	Name ↑	Namespace Prefix	Developer Console	New	Generate from WSDL	Run All Tests	Schedule Apex	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del Security	PropertyHandler_LWC							62.0	Active	300	Arpita Devmore, 21/12/2024, 9:47 pm	<input type="checkbox"/>

Dynamic Apex Classes

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