

CRM Application

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

Activity 1:

Dreams World Properties enhances customer interactions by integrating Salesforce. Website engagement triggers automated record creation, capturing customer details and preferences. Salesforce categorizes users as approved or non-approved, allowing tailored property recommendations for approved users. This seamless integration boosts user experience, streamlines operations, and drives growth in the real estate market.

Activity 2:

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

Activity 3:

created a Jotform integrated with Salesforce for automatic customer record

creation:Created a Jotform: Design a form to collect customer details (name, email, preferences).

Set Up Salesforce Integration: In Jotform, navigate to the "Integrations" tab and select Salesforce.

Connect to Salesforce: Authenticate your Salesforce account and select the object type (e.g., Lead or Contact) to map form fields.

Map Fields: Align Jotform fields with Salesforce fields for seamless data transfer.

Test the Integration: Submit a test entry to ensure records are created in Salesforce accurately.

Deploy the Form: Share the form link with customers for easy access.

This will streamline data collection and allow admins to create user records in Salesforce efficiently.

Activity 4:

Created Objects from Spreadsheet.

Directly Creating Objects from Spreadsheet in Salesforce

Activity 5:

To created a Customer object in Salesforce:

Go to Object Manager: Navigate to Object Manager in Salesforce.

Created Object from Spreadsheet: Click on "Create Object" and select "From Spreadsheet."

Download Spreadsheet: Click the provided link to download the customer spreadsheet.

Upload File: Upload the downloaded spreadsheet.

Map Fields: Align the fields in the spreadsheet with the desired fields in Salesforce.

Created Object: Complete the upload to create the Customer object.

Activity 6:

To created a Property object in Salesforce:

Go to Object Manager: Access Object Manager in Salesforce.

Created Object from Spreadsheet: Click on "Create Object" and select "From Spreadsheet."

Download Spreadsheet: Use the provided link to download the property spreadsheet.

Upload File: Upload the downloaded property spreadsheet.

Map Fields: Align the fields in the spreadsheet with the Property object fields in Salesforce.

Created Object: Complete the upload to create the Property object.

Activity 7:

Integrating jotform platform

Activity 8:

created roles

created role for Sales Executive Role

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.

Activity 9:

Created a Property Details App

Created the App

Go to App Manager: In Setup, search for "App Manager."

New Lightning App: Click on "New Lightning App."

App Details: Fill in the app name (e.g., Property Details App) and description.

App Branding: Choose an icon and color theme.

4. Add Tabs

Select Object Tabs: In the App settings, choose "Object Tabs" and add the Property object tab.

Set Tab Visibility: Adjust visibility settings to control who can see the app.

Activity 10:

Created Profiles

created Profiles for Customer and Manager in Salesforce, follow these steps:

1. Navigate to Profiles

Go to Setup: Click the gear icon in the top right corner and select Setup.

Search for Profiles: In the Quick Find box, type Profiles and select it.

2. Create Customer Profile

New Profile: Click on New Profile.

Select a Base Profile: Choose a standard profile (like "Standard User") as a template.

Name the Profile: Enter "Customer Profile" as the profile name.

Set Permissions: Adjust permissions according to what customers need (e.g., access to the Property object, ability to view records, etc.).

Save: Click Save.

3. Create Manager Profile

New Profile: Click on New Profile again.

Select a Base Profile: Choose a suitable base profile (like "Standard User" or "Salesforce User").

Name the Profile: Enter "Manager Profile" as the profile name.

Set Permissions: Grant additional permissions (e.g., full access to Property records, reporting capabilities, etc.).

Save: Click Save.

4. Assign Users to Profiles

Navigate to Users: In Setup, search for Users.

Select Users: Click on the user you want to assign to the profile.

Edit User: Click Edit and choose the appropriate profile (Customer Profile or Manager Profile).

Save Changes: Click Save.

Activity 11:

Created a Check Box field on user

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

Created new Field Named as "Verified" as Data type "Check Box"

Activity 12:

Created Users

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

Created User 1

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

Last Name: Executive

Role: Sales Executive

License: Salesforce

Profile: System Administrator

Save.

Created User 2

New User: Last Name: Manager

Role: Sales Manager

License: Salesforce Platform

Profile: Manager

Save.

Created User 3

New User: Last Name: Customer

Role: Customer

License: Salesforce Platform
Profile: Customer
Verified Checkbox: Unchecked
Save.

Created User 4
New User: Last Name: Customer2
Role: Customer
License: Salesforce Platform
Profile: Customer
Verified Checkbox: Checked
Save.

Activity 13:

Created an Approval Process for Property Object
An Approval process to approve or reject the records as according

Activity 14:

Created a Record trigger flow to submit the Approval Process Automatically.
A flow that can submit the records directly for approval
From Setup >> Search for Flows >> Click On New and Select "Record Trigger Flow".
Select Object >> Property
Select "Trigger the flow when" >> "A record is created"
Set Entry Conditions >> "None"
Save the Flow and Give label as "Property Approval" and "Activate"

Activity 15:

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

Activity 16:

Created a LWC Component
Created 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 17:

Created an Apex Class and make it aura enabled and name it “PropertHandler_LWC”
In metafile give your targets to deploy the component.

Activity 18:

Drag and drop the Component to App Page
From Setup >> Go to App Launcher >> Search for Property Details
On this Page click on gear icon and click on Edit Page
Drag the Component to your App Page and Save the Page.

Activity 19:

Gave Access of Apex Classes to Profiles
The Apex Class has a Security, Enable the security for the profiles that needs to access this class.

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

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

Outputs:

Records in Customer Object:

Property Details

Customer

Property

Search your Property

Customer

All Records

New

Change Owner

Import

Printable View

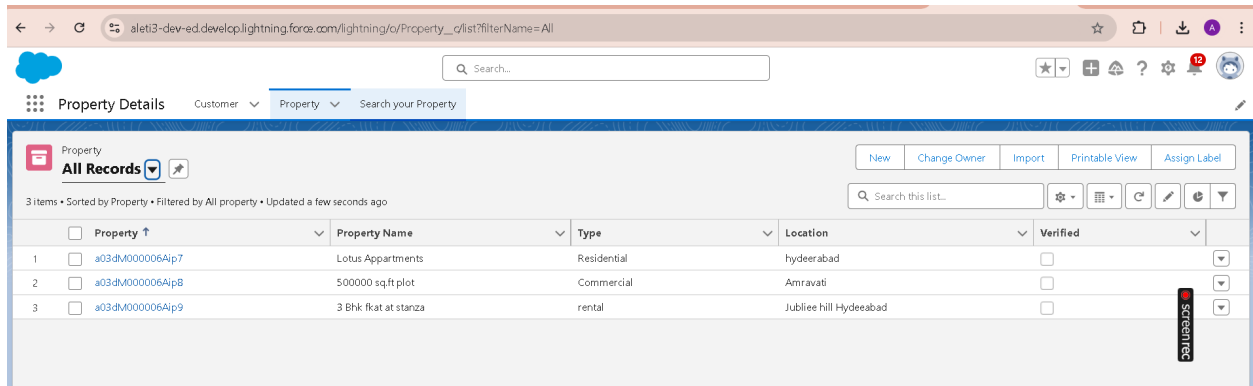
Assign Label

Search this list

3 items • Sorted by Customer • Filtered by All customer • Updated a few seconds ago

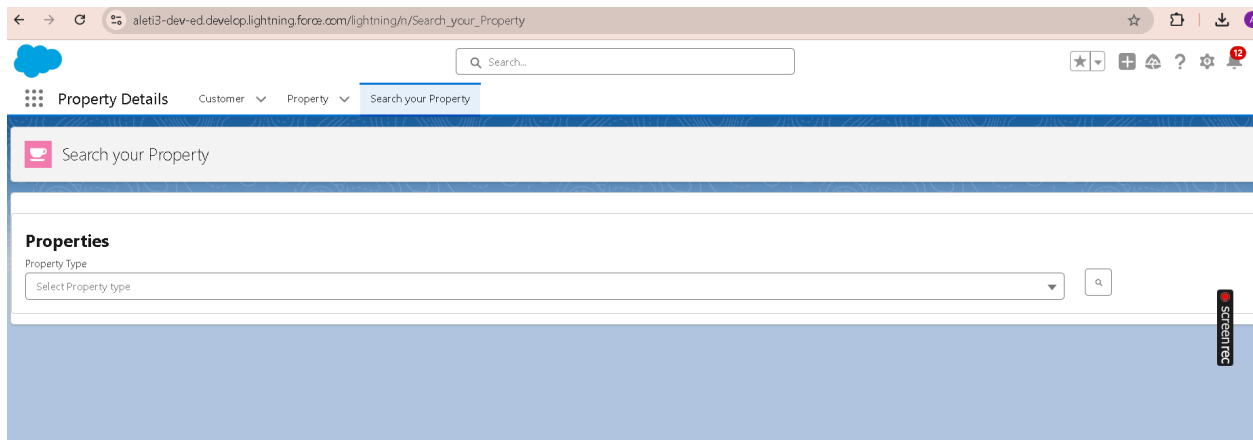
	Customer	Customer	Phone Nu...	Email	State	Property Type	Budget A...	Street Addr...	Street Addr...	City	postal code	
1	<input type="checkbox"/>	a02dM000005Ftej	Rakesh	788797.0	rakesh@gmail.com	Telangana	Residential	40,00,000	gb road	street no 45	Hyderabad	555001
2	<input type="checkbox"/>	a02dM000005Ftek	prakash	55448855	p@gmail.com	Maharashtra	Commercial	80,00,000	gachibowli	indira road	mumbai	6600014
3	<input type="checkbox"/>	a02dM000005Ftel	Prajwal	454545.0	prajwal@gmail.com	Maharashtra	Rental	25,000	kamdli	kathora	Amravati	444805

Records in the Property Object:

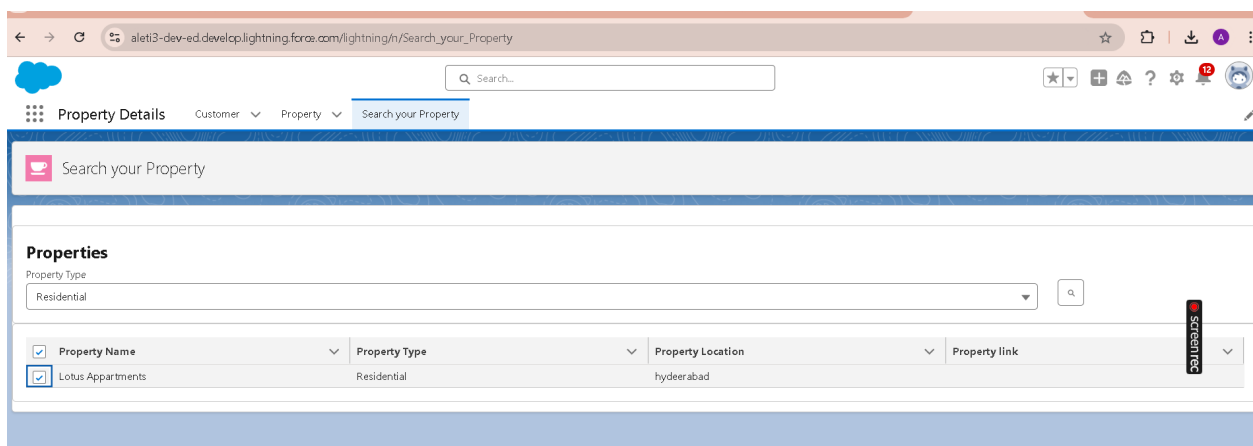


The screenshot shows the 'Property Details' page in a web application. The breadcrumb navigation is 'Customer > Property > Search your Property'. The page title is 'Property' with a sub-header 'All Records'. There are buttons for 'New', 'Change Owner', 'Import', 'Printable View', and 'Assign Label'. A search bar is present with the text 'Search this list...'. Below the search bar is a table with 3 items, sorted by Property, filtered by All property, and updated a few seconds ago. The table has columns: Property (with a dropdown arrow), Property Name, Type, Location, and Verified (with a checkbox). The table contains 3 rows of data.

Property	Property Name	Type	Location	Verified	
1	a03dm000006Aip7	Lotus Apartments	Residential	hyderabad	<input type="checkbox"/>
2	a03dm000006Aip8	500000 sq.ft plot	Commercial	Amravati	<input type="checkbox"/>
3	a03dm000006Aip9	3 Bhk flat at stanza	rental	Jubilee hill Hydeabad	<input type="checkbox"/>



The screenshot shows the 'Search your Property' page. The breadcrumb navigation is 'Customer > Property > Search your Property'. The page title is 'Search your Property'. Below the title is a section 'Properties' with a 'Property Type' dropdown menu. The dropdown menu is currently set to 'Select Property type'. There is a search button next to the dropdown.



The screenshot shows the 'Search your Property' page with the 'Property Type' dropdown set to 'Residential'. Below the dropdown is a table with 2 columns: Property Name and Property Type. The table contains 1 row of data.

Property Name	Property Type
Lotus Apartments	Residential

