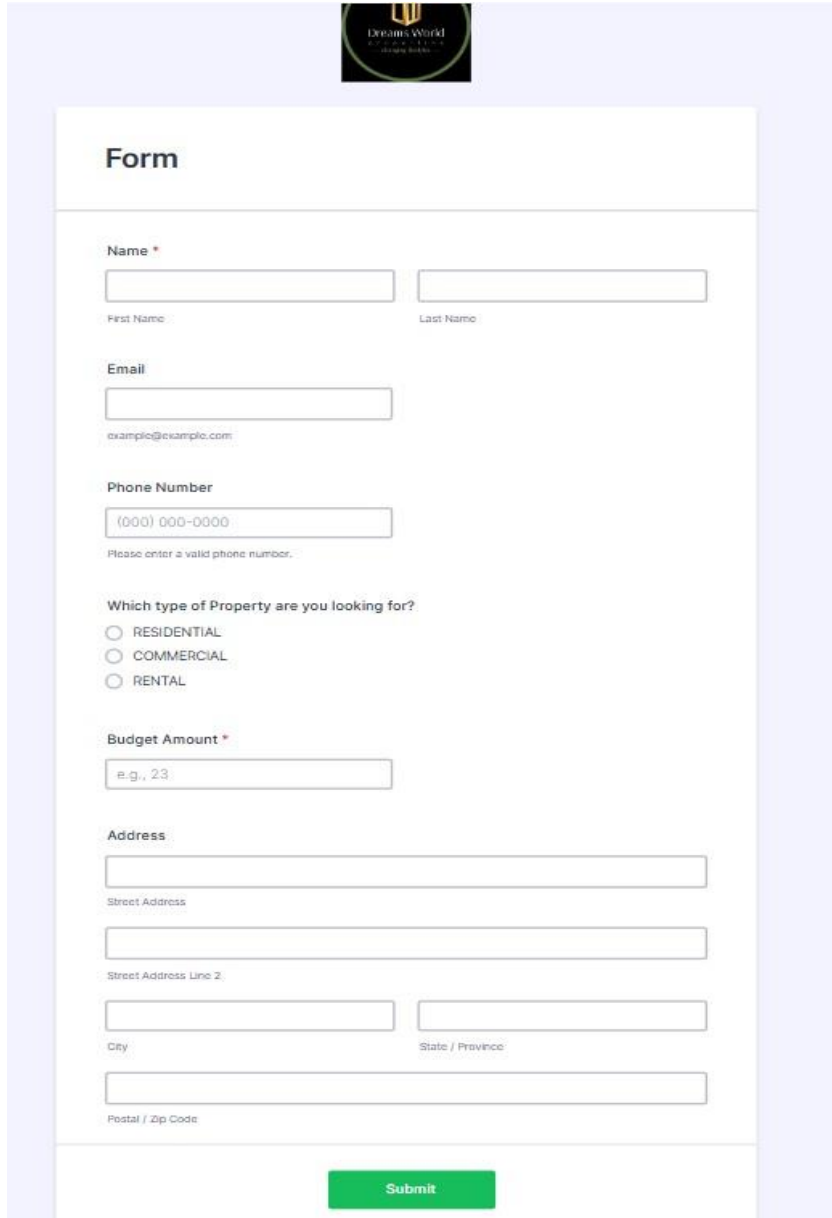


Project: A CRM Application to Handle the Clients and Their Property Related Requirements

Snapshots of Outputs:

1. Create A Jot form And Integrate It With The Org To Create A Record Of Customers Automatically.

2.



Form

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 for?

☐ RESIDENTIAL

☐ COMMERCIAL

☐ RENTAL

Budget Amount *

e.g., 23

Address

Street Address

Street Address Line 2

City State / Province

Postal / Zip Code

Submit

JOTFORM LINK-<https://form.jotform.com/243124538134047>

3. Create Objects from Spreadsheet.

i) Create Customer Object.

SETUP > OBJECT MANAGER

Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name
Customer_c

Custom
✓

Singular Label
Customer

Plural Label
Customers

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

4. Create Property Object.

SETUP > OBJECT MANAGER

Property

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name
Property_c

Custom
✓

Singular Label
Property

Plural Label
Property

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

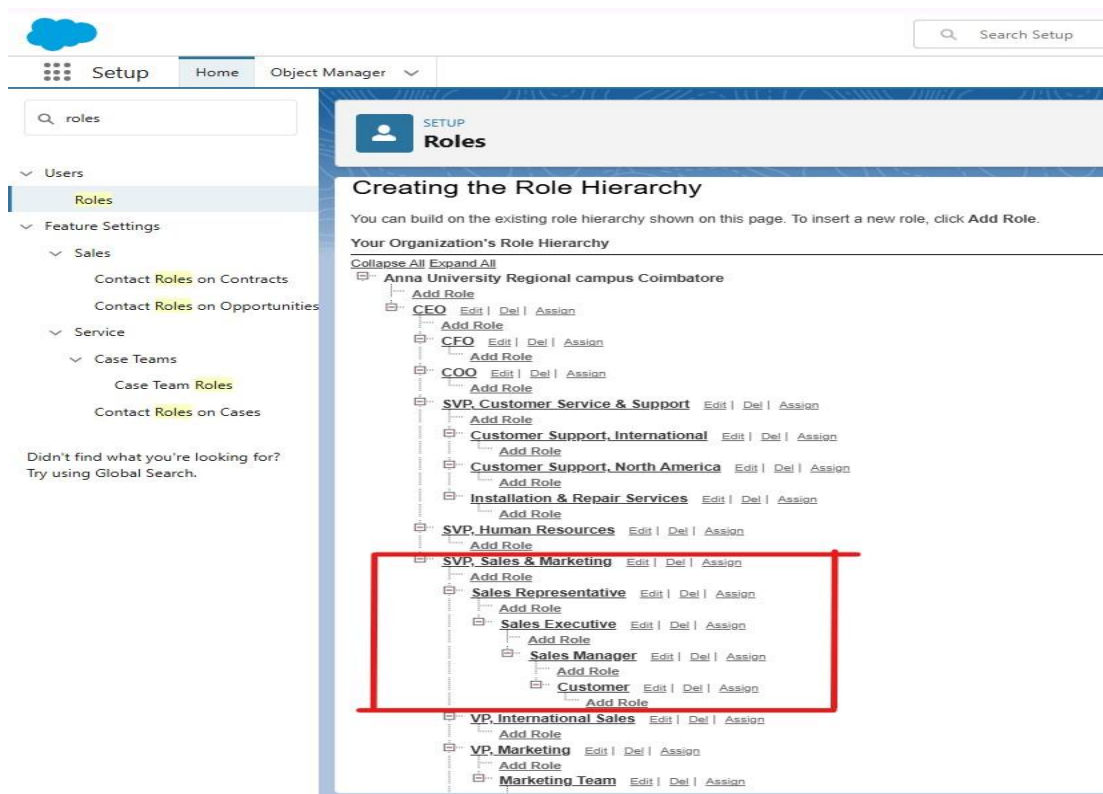
EditDelete

5. Integrate Jotform With Salesforce Platform.

The screenshot shows the Jotform Form Builder interface. On the left is a sidebar with navigation options: FORM SETTINGS, EMAILS, CONDITIONS, THANK YOU PAGE, INTEGRATIONS, WORKFLOWS, JOTFORM SIGN, and MOBILE NOTIFICATIONS. The main area is titled 'SALESFORCE' and includes a sub-header 'Send new leads, contacts, or accounts to your sales CRM'. Below this is a 'Select a Salesforce Object' dropdown menu with 'Customer' selected. Under 'Create a record', there's a section for mapping form fields to Salesforce fields. The 'Object Fields' column lists form fields like Customer__c, City, Budget Amount, Property Type, Phone Number, Street Address, Email, Name, State, and Street Address line 2. The 'Dreams World' column lists corresponding Salesforce fields like Name - First Name, Address - City, Budget Amount, Which type of Property are you lookin..., Phone Number, Address - Street Address, Email, Name - Last Name, Address - State, and Address - Street Address 2. Each mapping has an 'X' icon to remove it.

6. Create Roles.

i) Sales Executive Role.



7. Create A Property Details App.

← Lightning App Builder

⚙️ App Settings

📄 Pages ▾

Property Details

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

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 ⓘ
 #0070D2

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

App Launcher Preview


7.Create Profiles for customers.

7.1 Customer profile 1

Q. profi

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

SETUP

Profiles

Profile Edit
Customer

Set the permissions and page layouts for this profile.

Profile Edit

Save Save & New Cancel

Name
Customer

User License
Salesforce Platform

Description

Custom Profile ✓

Custom App Settings

Visible Default

Analytics Studio (standard__Insights)

☐

☐

App Launcher (standard__AppLauncher)

☐

☐

Platform (standard__Platform)

☐

☒

Visible Default

Property Details (Property_Details)

☒

☐

WOC (standard__Work)

☐

☐

Service Provider Access

Tah Ramona

7.2 Customer profile 2

SETUP

Profiles

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Addresses	<input type="checkbox"/>				<input type="checkbox"/>	
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Authorization Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Data Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Texts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Operations	<input type="checkbox"/>					
Business Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Contact Point Phones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Type Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DAB Companies	<input type="checkbox"/>					
Data Use Legal Bases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Purposes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input type="checkbox"/>	<input type="checkbox"/>				
Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>				<input type="checkbox"/>	
Party Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Sellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

7.3 Customer profile 3

SETUP

Profiles

	Read	Create	Edit	Delete	View All	Modify All
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Property	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After:

Session Security Level Required at Login:

Password Policies

User passwords expire in:

Enforce password history:

Minimum password length:

Password complexity requirement:

Password question requirement:

Maximum invalid login attempts:

Lockout effective period:

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

[illegible]

8.3 Manager profile 3

SETUP

Profiles

Contact Point Addresses

☐

☐

☐

☐

☐

Contact Point Consents

☐

☐

☐

☐

☐

Contact Point Emails

☐

☐

☐

☐

☐

Sellers

☐

☐

☐

☐

☐

Streaming Channels

☐

☐

☐

☐

☐

User External Credentials

☐

☐

☐

☐

☐

Custom Object Permissions

Basic Accesses

Read

Create

Edit

Delete

View All

Modify All

Customers

☒

☐

☒

☒

☒

☒

Only Administrators

Read

Create

Edit

Delete

View All

Modify All

Property

☒

☐

☒

☒

☒

☒

Basic Accesses

Read

Create

Edit

Delete

View All

Modify All

Property

☒

☐

☒

☒

☒

☒

Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

--None--

Password Policies

User passwords expire in

90 days

Enforce password history

3 passwords remembered

Minimum password length

8

Password complexity requirement

Must include alpha and numeric characters

Password question requirement

Cannot contain password

Maximum invalid login attempts

10

Lockout effective period

15 minutes

Obscure secret answer for password resets

☐

Require a minimum 1 day password lifetime

☐

Don't immediately expire links in forgot password emails

☐

Save

Save & New

Cancel

9. Create A Check Box Field On User.

Setup

Home

Object Manager

Search Setup

Star

Grid

Help

Refresh

Settings

Notifications

Logout

SETUP > OBJECT MANAGER

User

Details

Fields & Relationships

User Page Layouts

User Profile Page Layouts

Lightning Record Pages

Buttons and Links

Compact Layouts

Field Sets

Object Limits

Related Lookup Filters

Search Layouts

List View Button Layout

Triggers

Flow Triggers

Validation Rules

User Custom Field

Verified

Back to User Fields

Validation Rules

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label

Verified

Field Name

Verified

API Name

Verified__c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Object Name

User

Data Type

Checkbox

Created By

Ayishaaryaa.M.

09/11/2024, 1:02 am

Modified By

Ayishaaryaa.M.

09/11/2024, 1:02 am

General Options

Default Value

Unchecked

Validation Rules

New

Validation Rules Help

No validation rules defined.

Back to Top

Always show me more records per related list

10. Create Users. (User 1, User 2, User 3, User 4)

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The 'All Users' page displays a table of users. A red box highlights the following users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Customer	cust	user3@au.com	Customer	✓	Customer
<input type="checkbox"/> Edit	Customer2	cust	user4@au.com	Customer	✓	Customer
<input type="checkbox"/> Edit	Executive	exec	user1@au.com	Sales Executive	✓	System Administrator
<input type="checkbox"/> Edit	M. Avisharavua	AM	a.com.aplication@auron.com	Sales Manager	✓	Manager

11. Create An Approval Process For Property Object.

The screenshot shows the Salesforce Setup interface with the 'Approval Processes' section selected. The 'Property: Property Approval' process definition is displayed. The process is active and has the following details:

- Process Name:** Property Approval
- Object Name:** Property Approval
- Entry Criteria:** (Property: Location NOT EQUAL TO Home) AND (Property: Verified EQUALS False)
- Reassign Criteria:** Administrator OR Current Approver
- Approval Assignment Email Template:** Property Owner Role: Sales Manager
- Initial Submission Actions:** Record Lock
- Approval Steps:** 1. Executive Approval (Criteria: Verified Property)
- Approval Actions:** 1. Field Update (Field: Verified Property)
- Rejection Actions:** 1. Field Update (Field: Verified Property)

12. Create A Record Trigger Flow to Submit The Approval Process Automatically.

The screenshot displays the Salesforce Flow Builder interface for a 'Record-Triggered Flow' named 'Property Approval - V1'. The flow is configured with the following steps:

- Start**: Record-Triggered Flow Start
- Run Immediately**: A connector node.
- Approval for property**: An action node.
- End**: A red square end node.

The right sidebar shows the configuration for the 'Submit for Approval' action:

- Label**: Approval for property
- API Name**: Approval_for_property
- Description**: (Empty field)
- Submit for Approval**: submit-submit
- Set Input Values for the Selected Action**:
 - Record ID**: A Triggering Property...c > Record ID
 - Approval Process Name Or ID**: Not Included

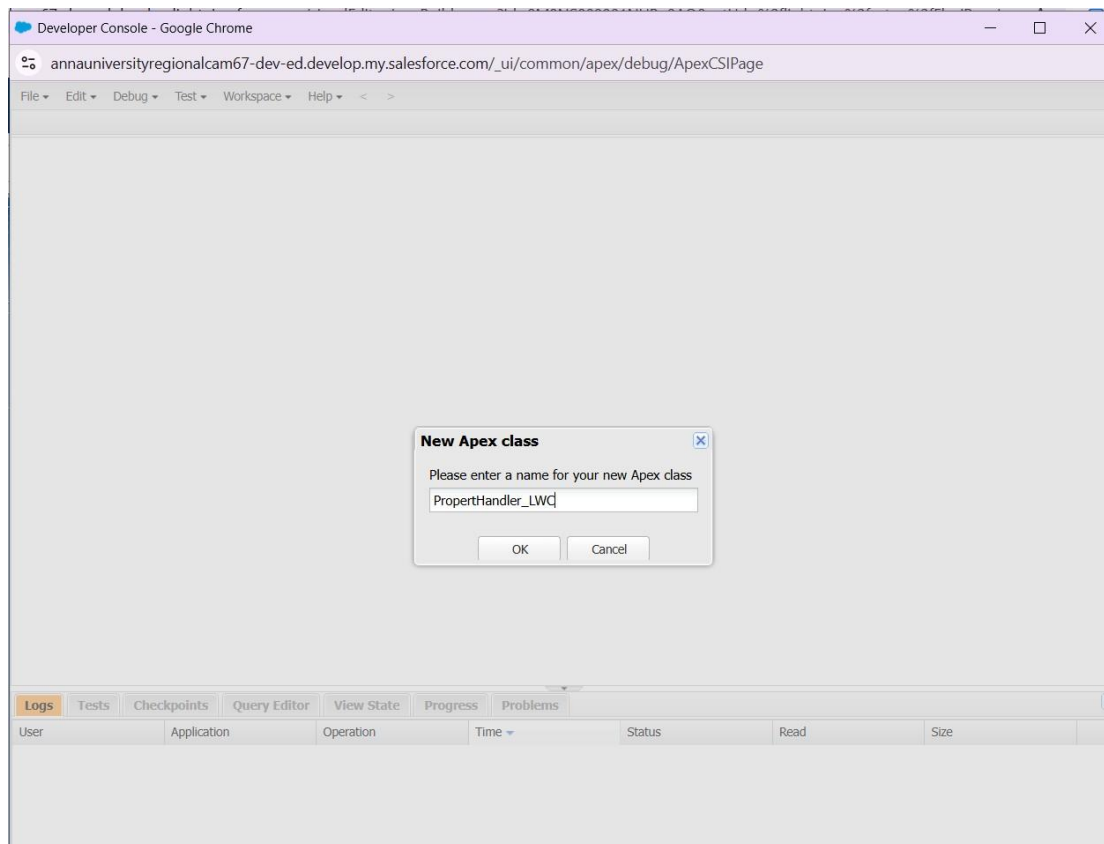
13. Create An App Page.

The screenshot displays the Salesforce Lightning App Builder interface for creating an app page named 'Search your Property'. The page is shown in a desktop view with a header and two main content areas. The left sidebar shows a list of components, and the right sidebar shows the configuration for the 'Search your Property' page:

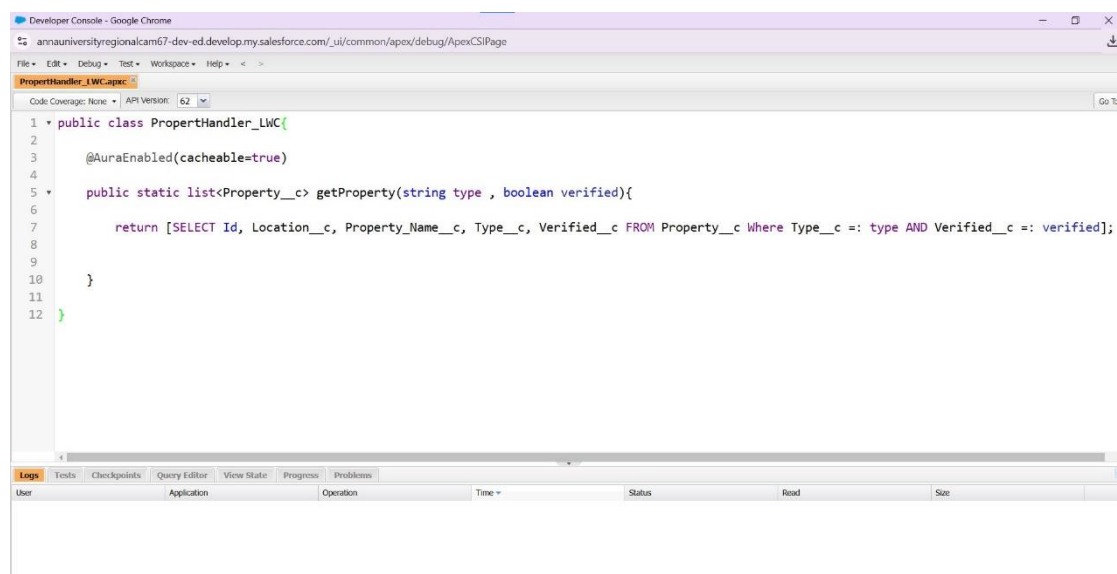
- Page**: Search your Property
- API Name**: Search_your_Property
- Page Type**: App Page
- Template**: Header and Left Sidebar
- Description**: (Empty field)
- Actions**: Select...

14.Create A LWC Component.

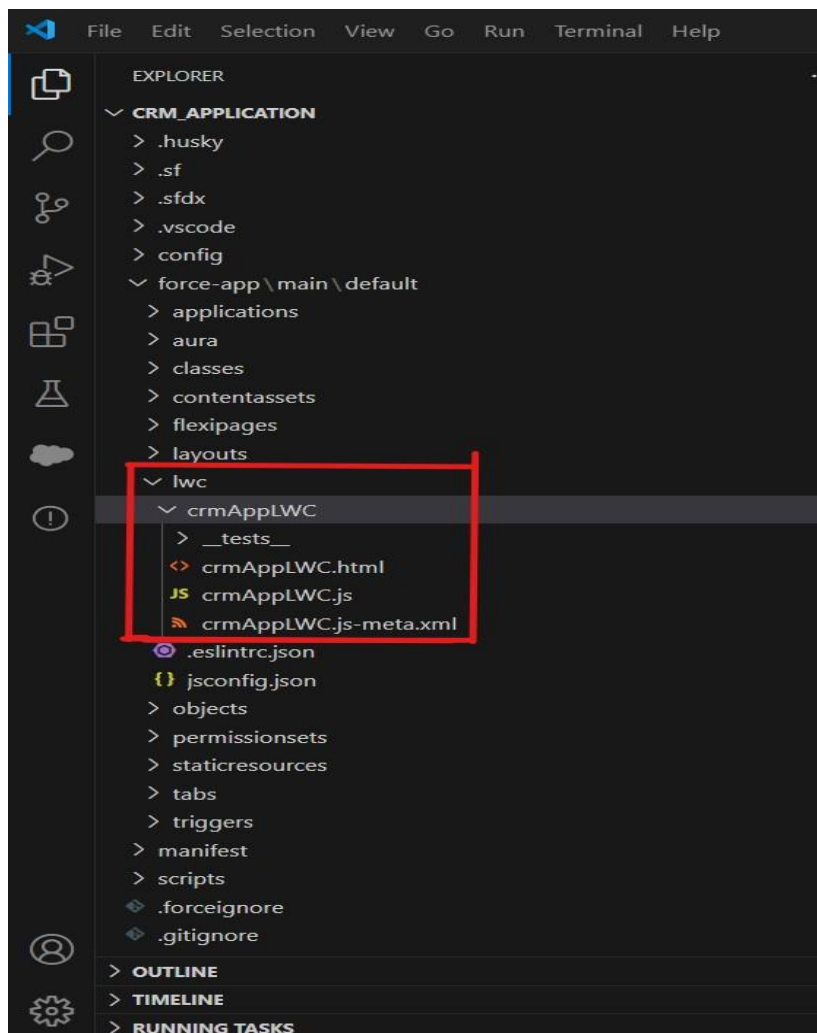
14.1 Create a Apex class named PropertHandler_LWC



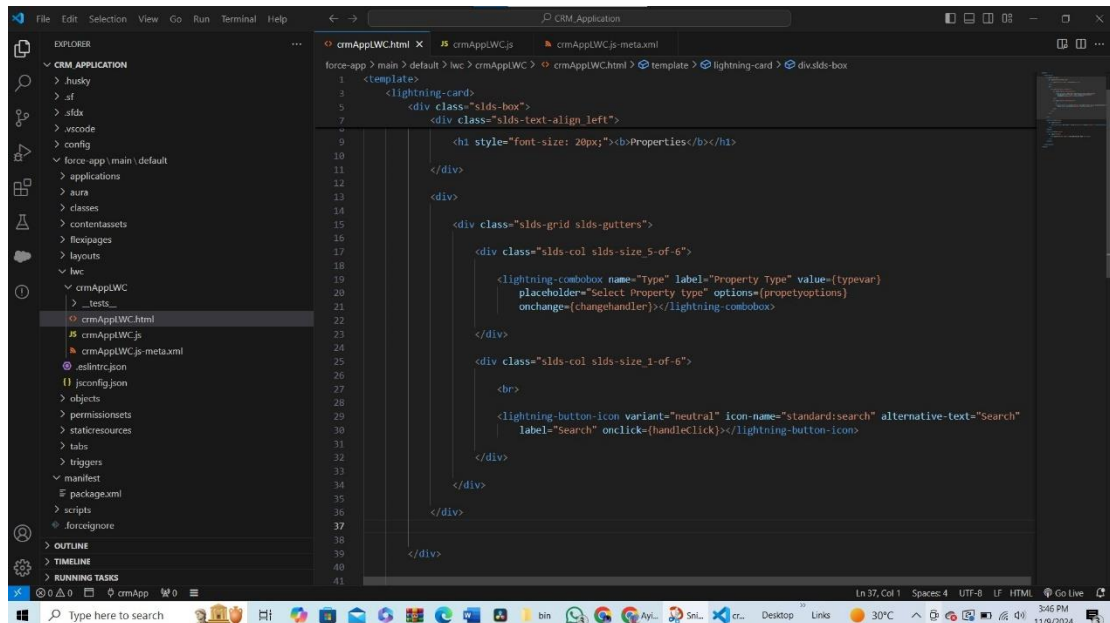
14.2. Apex Code



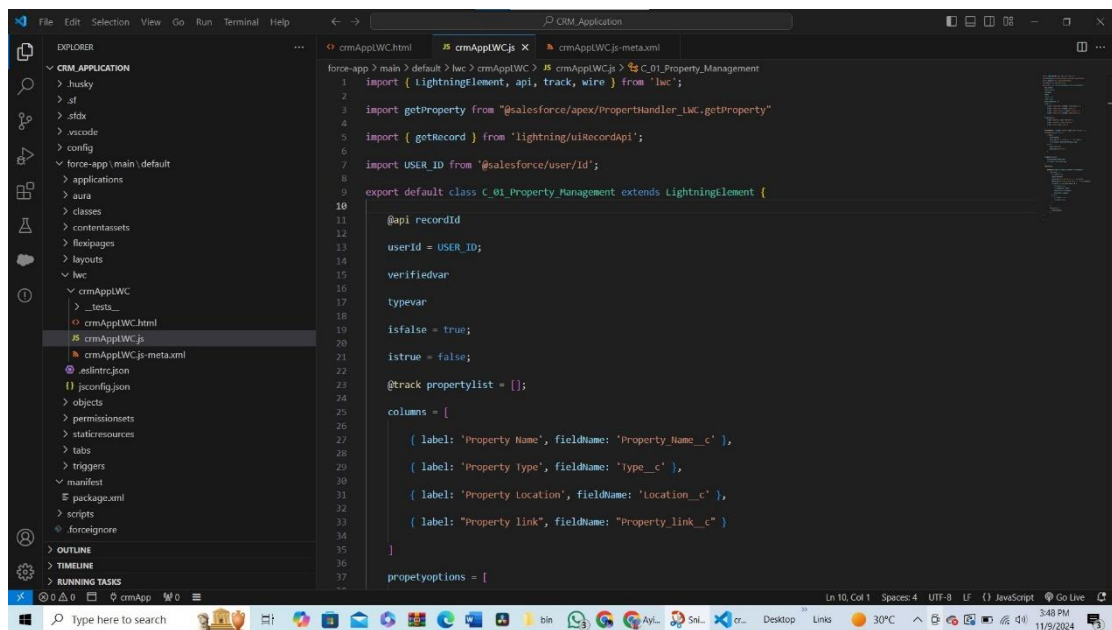
14.3 Folder structure:



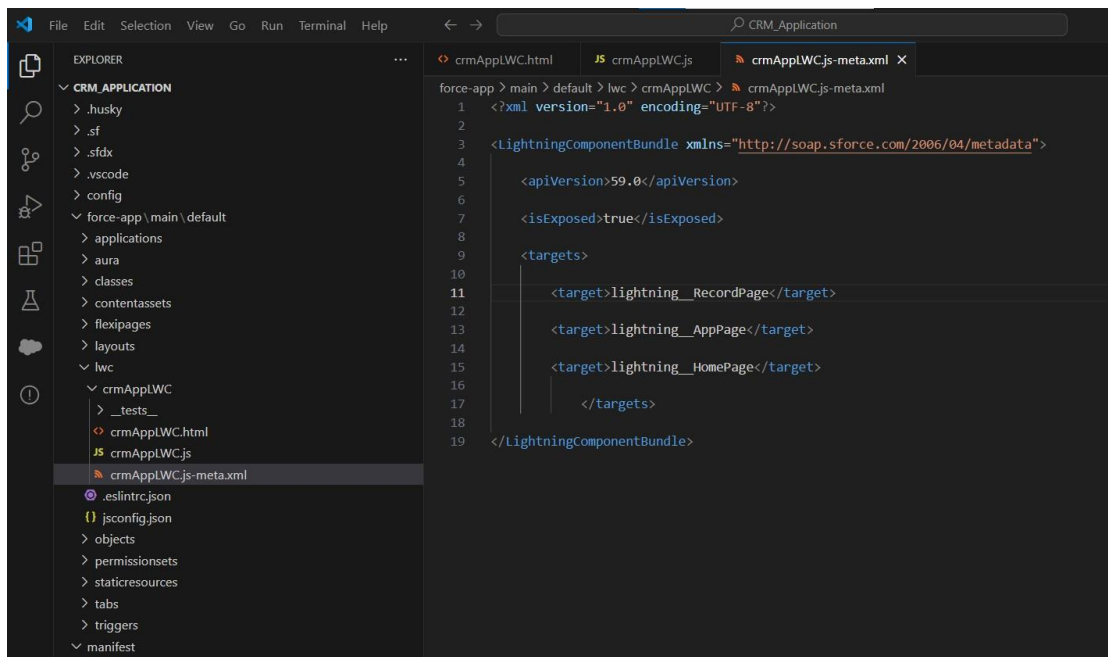
14.4 LWC-Html



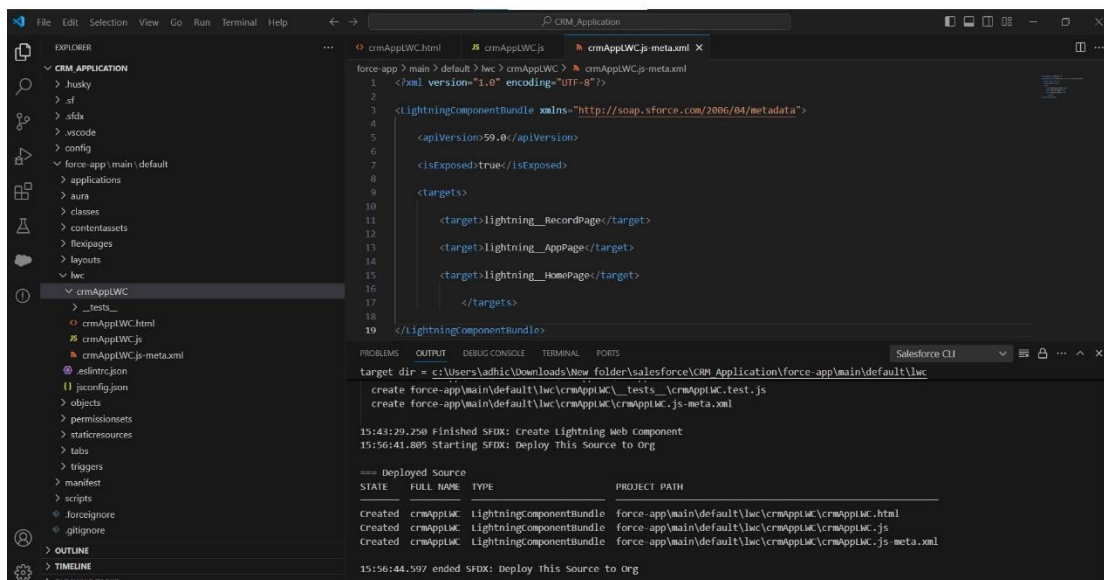
14.5 LWC-js



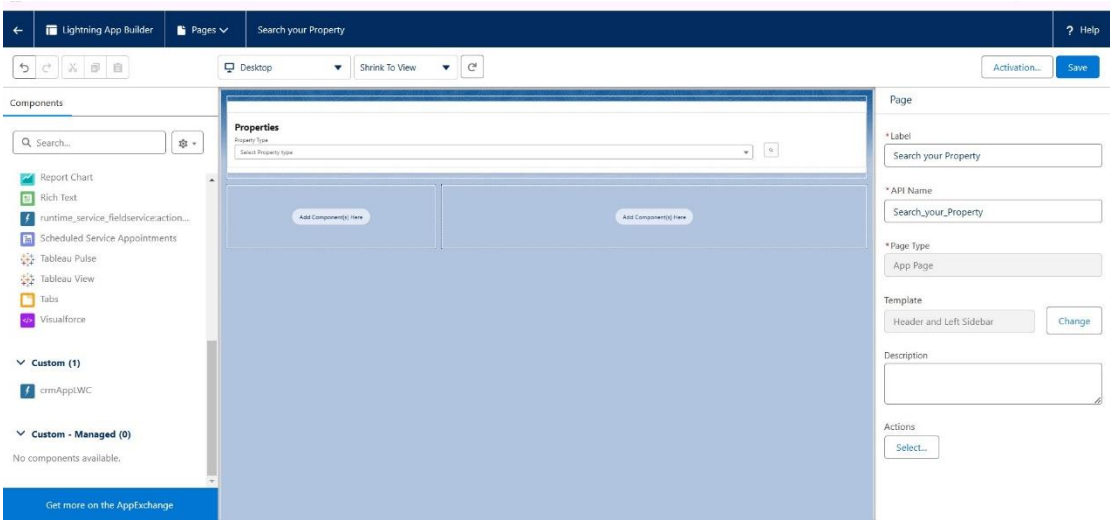
14.6 LWC- meta



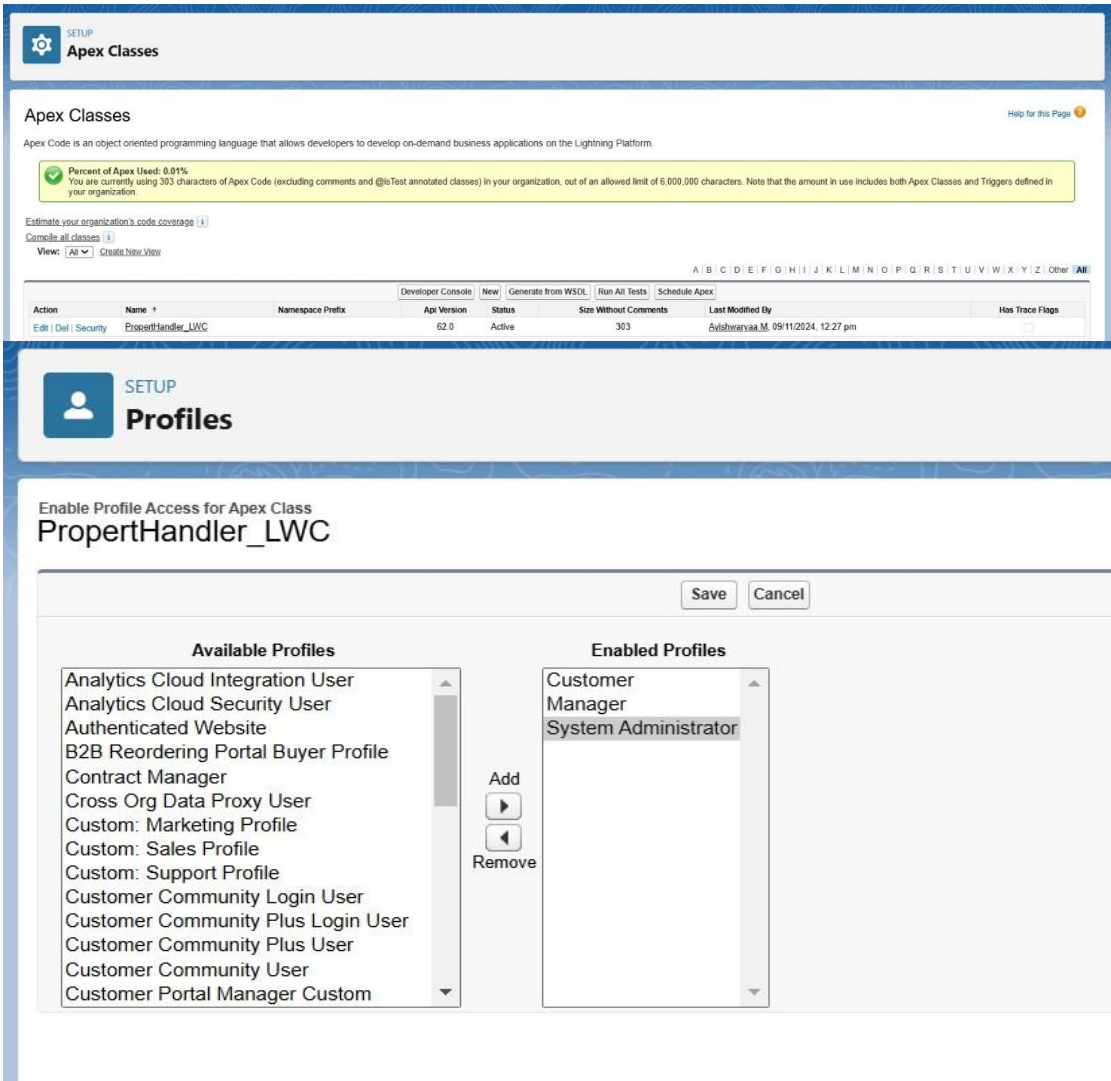
14.7 LWC- Depolyment



15 Drag This Component To Your App Page.



16 Give Access Of Apex Classes To Profiles.



17 Final Pages

17.1 Customer page

Property Details

Customers

Property

Search your Property

Customers

All Records

New

Change Owner

Import

Printable View

Assign Label

Q Search this list...

5 items • Sorted by Customer • Filtered by All customers • Updated a few seconds ago

	Customer ↑	Customer	Phone No...	Email	State	Property Type	Budget A...	Street Address	Street Addr...	City	postal code	
1	<input type="checkbox"/>	a02NS0000061WH	Rakesh	788797.0	rakesh@gmail.com	Telangana	Residential	40,00,000	gb road	street no 45	Hyderabad	555001
2	<input type="checkbox"/>	a02NS0000061WI	prakash	55448855	pb@gmail.com	Maharashtra	Commercial	80,00,000	gachibowli	indira road	mumbai	6600014
3	<input type="checkbox"/>	a02NS0000061WJ	Prajwal	454545.0	prajwal@gmail.com	Maharashtra	Rental	25,000	kameli	kathora	Amravati	444805
4	<input type="checkbox"/>	Latha	Shree	(568) 9...	shree123@yahoo.com	Kerala	RESIDENTIAL	50,00,000	Lakshmi nager, gopalapuram	Xorus	lgbo book	Alapula
5	<input type="checkbox"/>	world	hello	(021) 0...	helloworld@gmail.com	hbiu0ol	COMMERCIAL	23,000	xyrtbu	houuhono	juni	cozoih

17.2 Property Page

17.3 Search PropertyPage

Property Details

Customers

Property

Search your Property

Search your Property

Properties

Property type:

Residential

<input type="checkbox"/>	Property Name	Property Type	Property Location	Property link
<input type="checkbox"/>	Lotus Apartments	Residential	hydeerabad	

17.4 Final Jotform Table

Jotform

Tables

Dreams World

Share

Help

Dreams World

New Tab

Q Search

Filter

Columns

Form

Download All

	Submission Date	Source App	Name	Email	Phone Number	Which type of Pro...	Budget Amount	Address
1	Nov 9, 2024		Shree Latha	shree123@yahoo.com	(568) 923-4453	RESIDENTIAL	5000000	Lakshmi nager, gopalapur...
2	Nov 9, 2024		hello world	helloworld@gmail.com	(021) 004-6587	COMMERCIAL	23000	xyrtbu, houuhono...

ADD