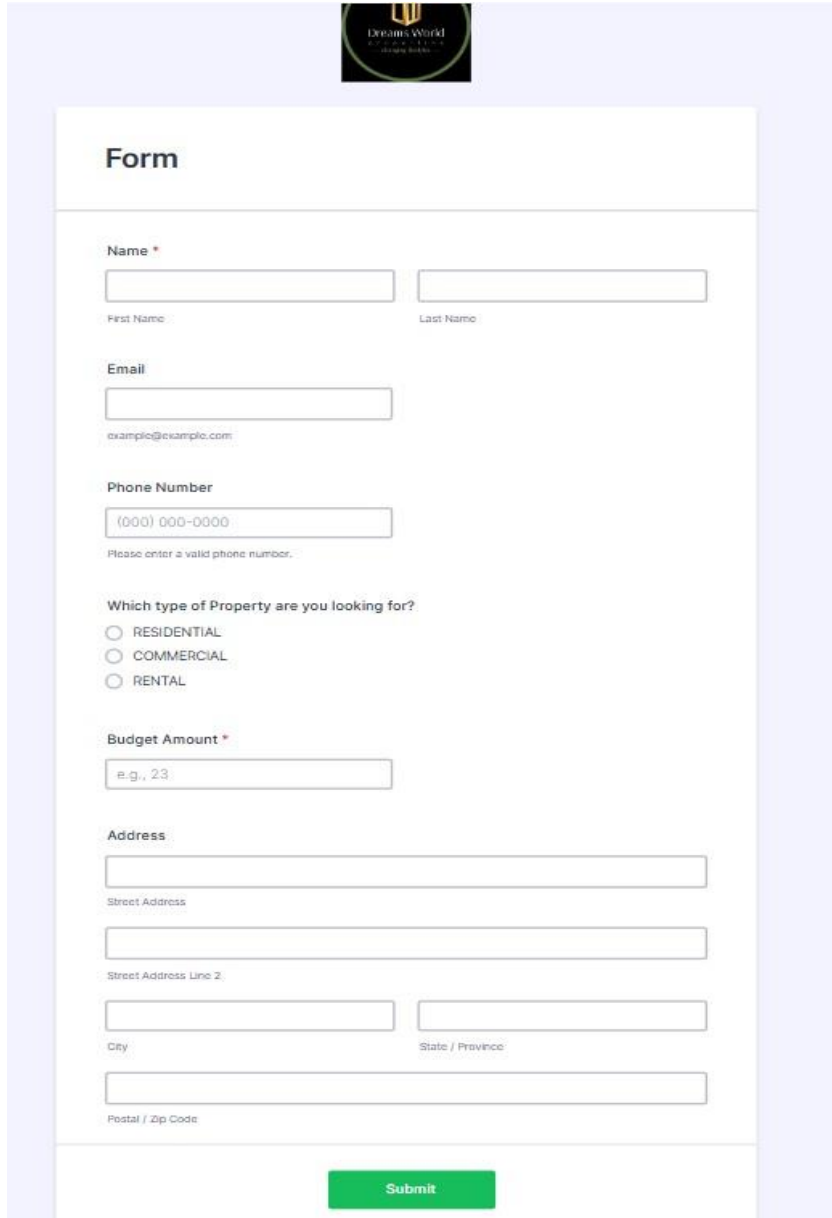**Project: A CRM Application to Handle the Clients and Their Property Related Requirements**

Snapshots of Outputs:

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

2.

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

3. **Create Objects from Spreadsheet.**
i) Create Customer Object.

SETUP > OBJECT MANAGER
Customer

Details	**Details**
Fields & Relationships	
Page Layouts	Description
Lightning Record Pages	
Buttons, Links, and Actions	API Name Enable Reports
Compact Layouts	Customer__c ✓
Field Sets	Custom Track Activities
Object Limits	✓ ✓
Record Types	Singular Label Track Field History
Related Lookup Filters	Customer
Search Layouts	Plural Label Deployment Status
List View Button Layout	Customers Deployed
	Help Settings
	Standard salesforce.com Help Window

4. **Create Property Object.**

SETUP > OBJECT MANAGER
Property

Details	**Details** Edit Delete
Fields & Relationships	
Page Layouts	Description
Lightning Record Pages	
Buttons, Links, and Actions	API Name Enable Reports
Compact Layouts	Property__c ✓
Field Sets	Custom Track Activities
Object Limits	✓ ✓
Record Types	Singular Label Track Field History
Related Lookup Filters	Property
Search Layouts	Plural Label Deployment Status
List View Button Layout	Property Deployed
	Help Settings
	Standard salesforce.com Help Window

5. Integrate Jotform With Salesforce Platform.

6. Create Roles.
i) Sales Executive Role.
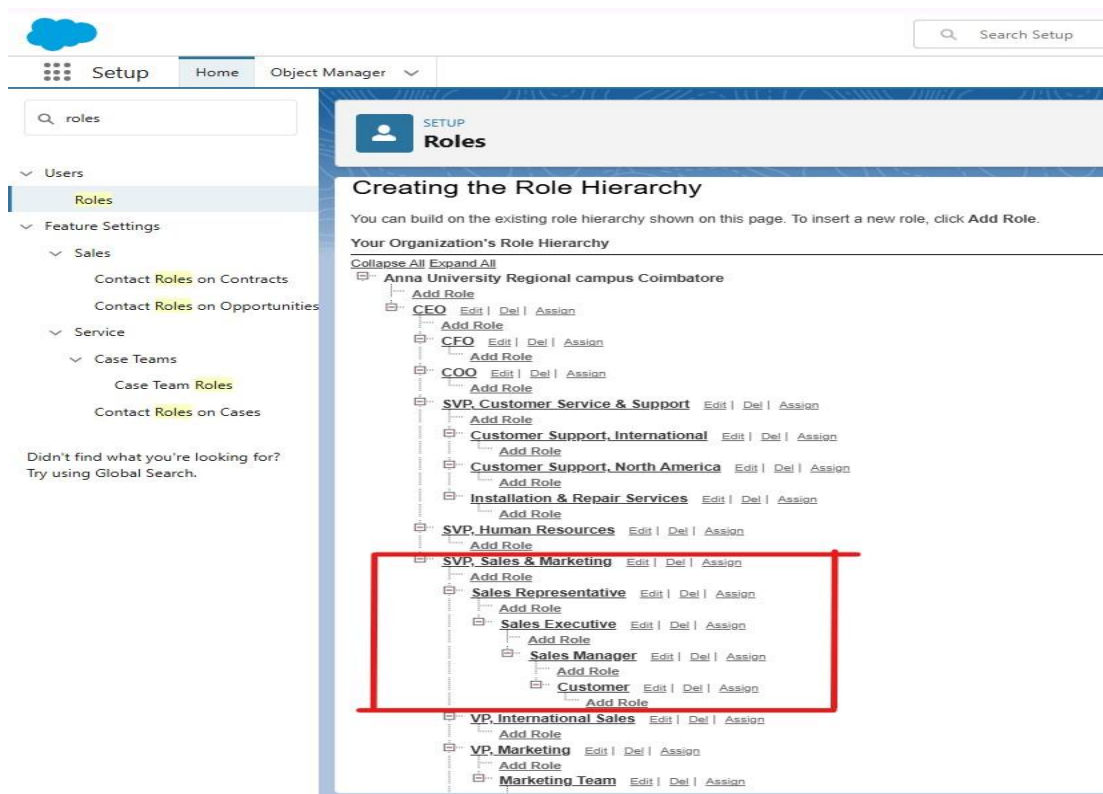
7. Create A Property Details App.

7.Create Profiles for customers.

7.1 Customer profile 1

7.2 Customer profile 2

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			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Accounts	☐	☐	☐	☐	☐	☐	Contact Point Phones	☐	☐	☐	☐	☐	☐
Addresses	☐				☐		Contact Point Type Consents	☐	☐	☐	☐	☐	☐
Assets	☐	☐	☐	☐			Customers	☐	☐	☐	☐	☐	☐
Authorization Forms	☐	☐	☐	☐	☐	☐	D&B Companies	☐					
Authorization Form Consents	☐	☐	☐	☐	☐	☐	Data Use Legal Bases	☐	☐	☐	☐	☐	☐
Authorization Form Data Uses	☐	☐	☐	☐	☐	☐	Data Use Purposes	☐	☐	☐	☐	☐	☐
Authorization Form Texts	☐	☐	☐	☐	☐	☐	Documents	☐	☐	☐	☐	☐	☐
Background Operations	☐						Engagement Channel Types	☐	☐	☐	☐	☐	☐
Business Brands	☐	☐	☐	☐	☐	☐	Ideas	☐	☐				
Communication Subscriptions	☐	☐	☐	☐	☐	☐	Individuals	☐	☐	☐	☐	☐	☐
Communication Subscription Channel Types	☐	☐	☐	☐	☐	☐	Labels	☐	☐	☐	☐	☐	☐
Communication Subscription Consents	☐	☐	☐	☐	☐	☐	Locations	☐				☐	
Communication Subscription Timings	☐	☐	☐	☐	☐	☐	Party Consents	☐	☐	☐	☐	☐	☐
Contacts	☐	☐	☐	☐	☐	☐	Push Topics	☐	☐	☐	☐		
Contact Point Addresses	☐	☐	☐	☐	☐	☐	Sellers	☐	☐	☐	☐	☐	☐
Contact Point Consents	☐	☐	☐	☐	☐	☐	Streaming Channels	☐	☐	☐	☐	☐	☐
Contact Point Emails	☐	☐	☐	☐	☐	☐	User External Credentials	☐	☐	☐	☐	☐	

7.3 Customer profile 3

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
	☐	☐	☐	☐	☐	☐		☐	☐	☐	☐		
Contact Point Addresses	☐	☐	☐	☐	☐	☐	Sellers	☐	☐	☐	☐	☐	☐
Contact Point Consents	☐	☐	☐	☐	☐	☐	Streaming Channels	☐	☐	☐	☐	☐	☐
Contact Point Emails	☐	☐	☐	☐	☐	☐	User External Credentials	☐	☐	☐	☐	☐	

Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Customers	☐	☐	☐	☐	☐	☐	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	☐

8. Create Profiles for Managers

8.1 Manager Profile 1

8.2 Manager profile 2

8.3 Manager profile 3

9. Create A Check Box Field On User.

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

11.Create An Approval Process For Property Object.

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

13. Create An App Page.

14. **Create A LWC Component**.

14.1 Create a Apex class namedPropertHandler_LWC
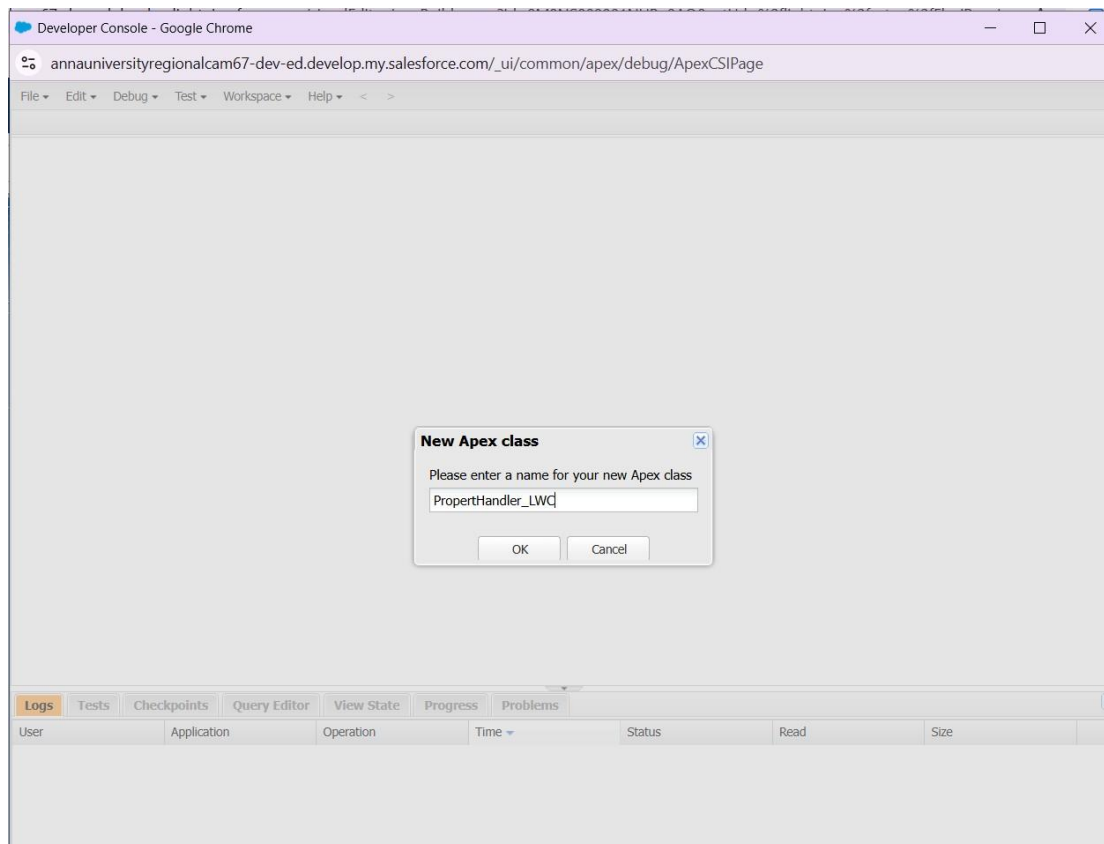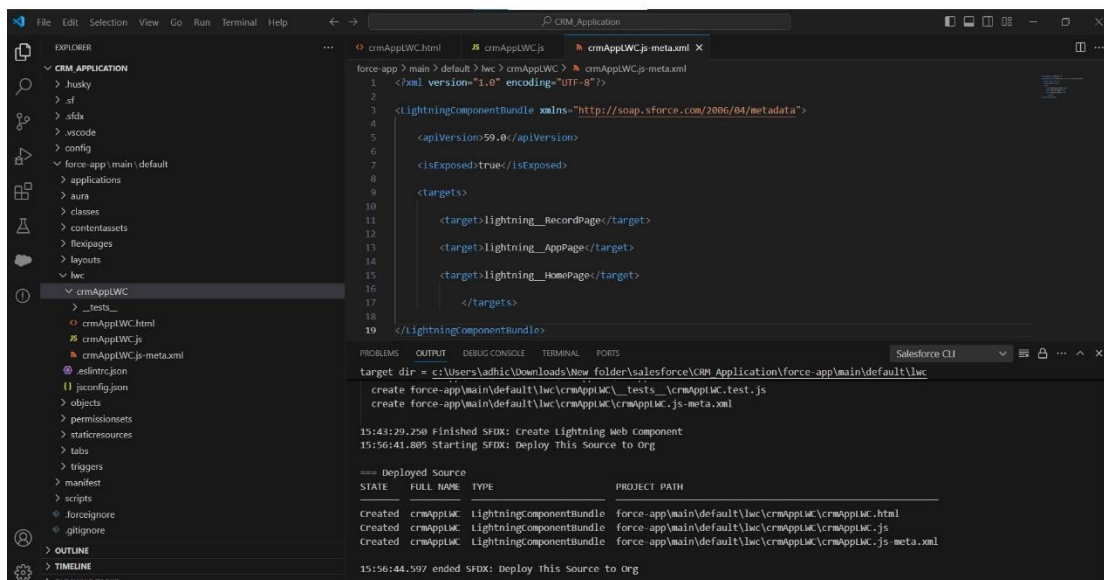

14.2. Apex Code
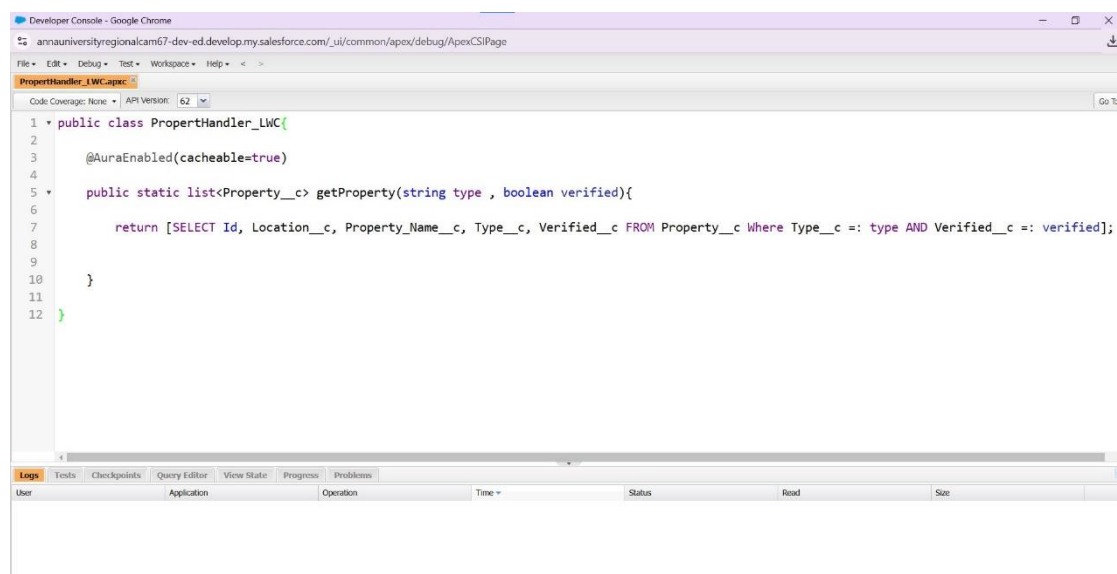
14.3 Folder structure:
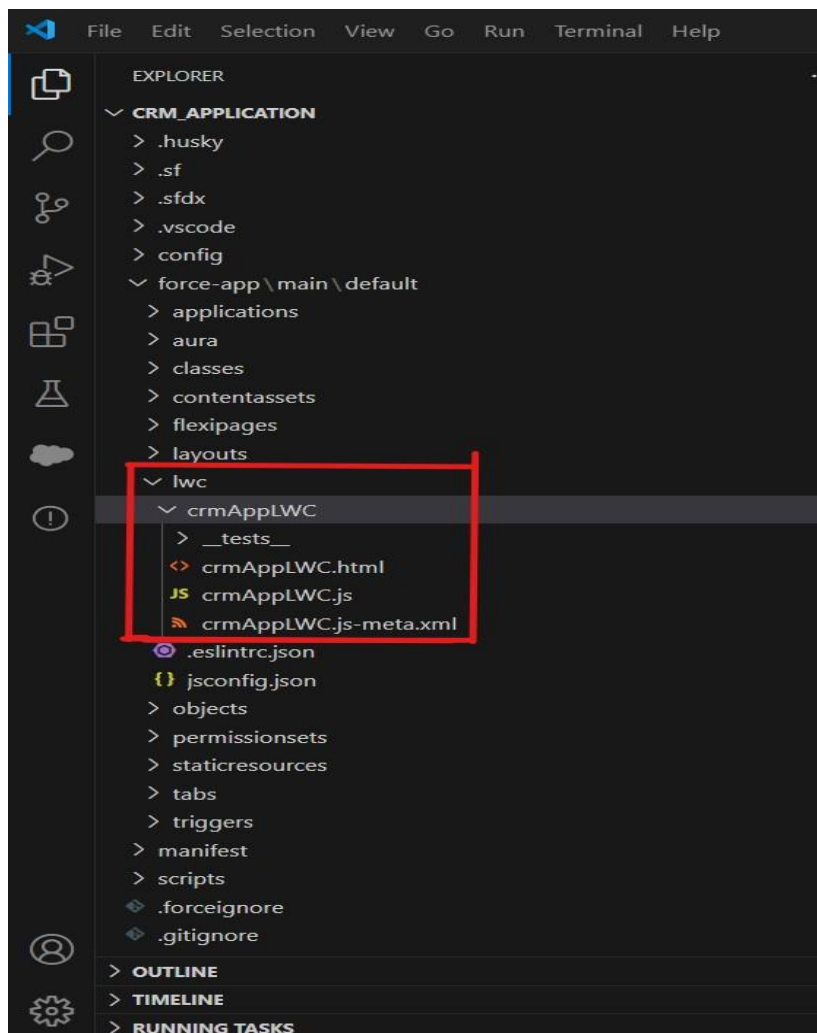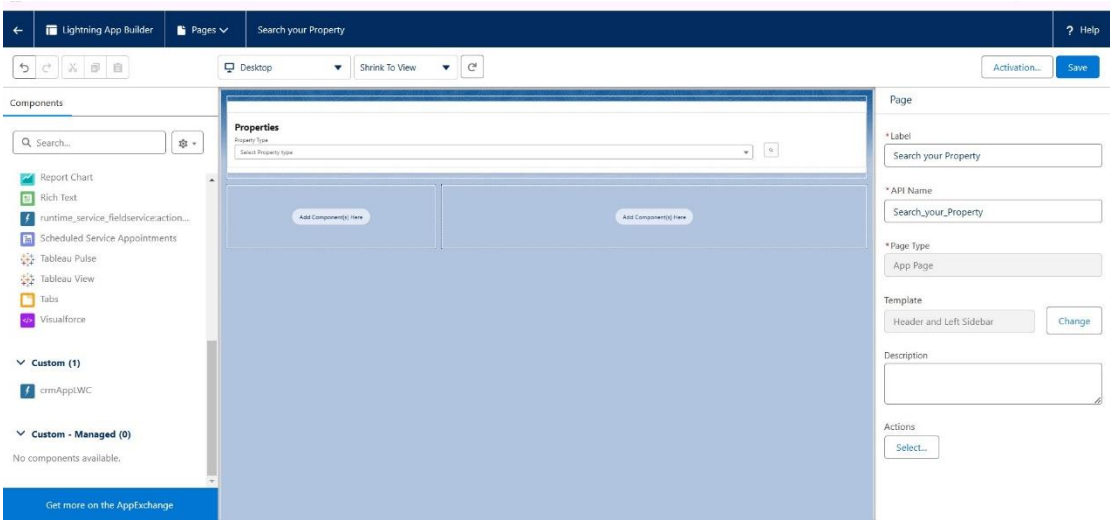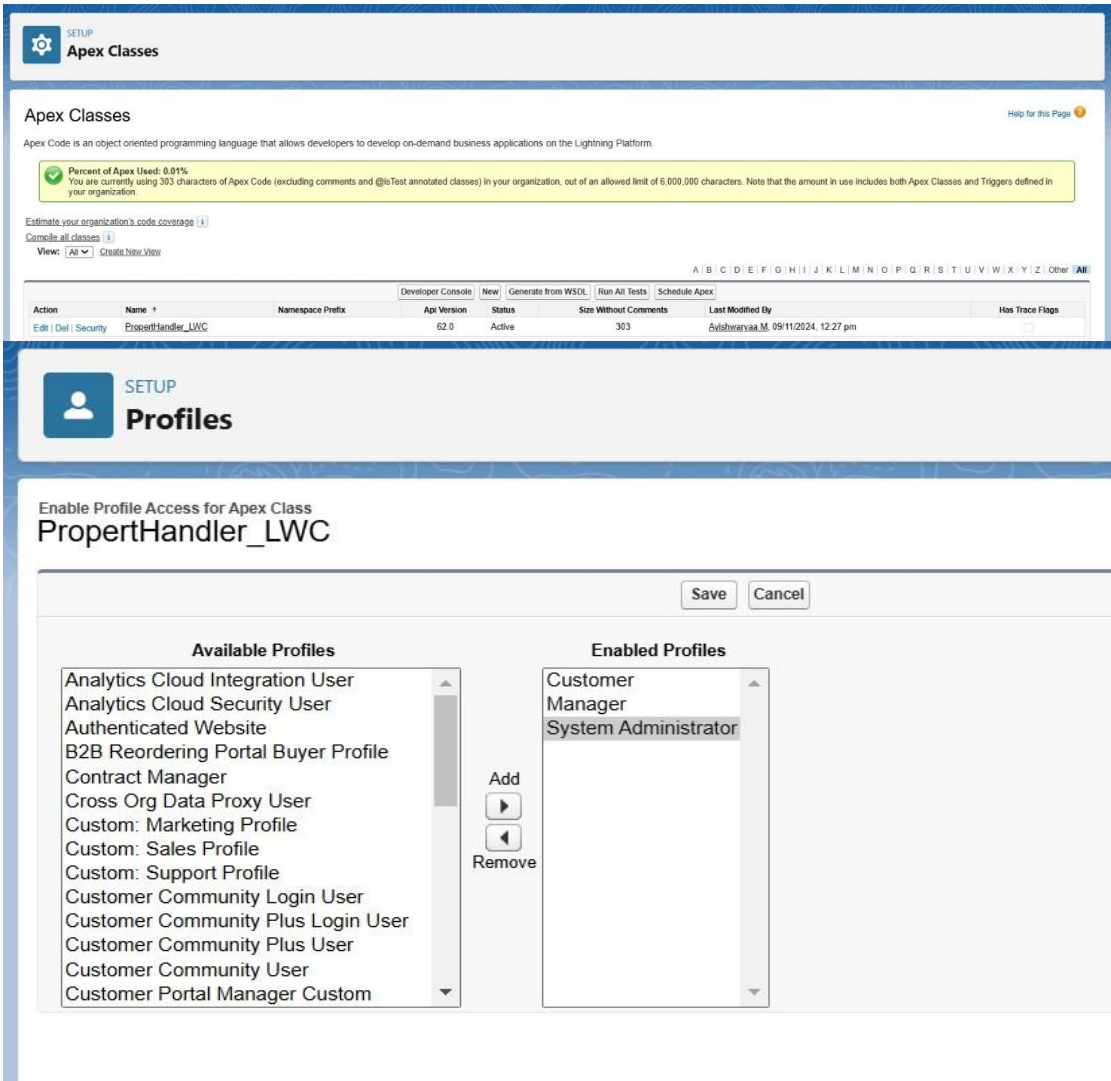
14.4 LWC-Html
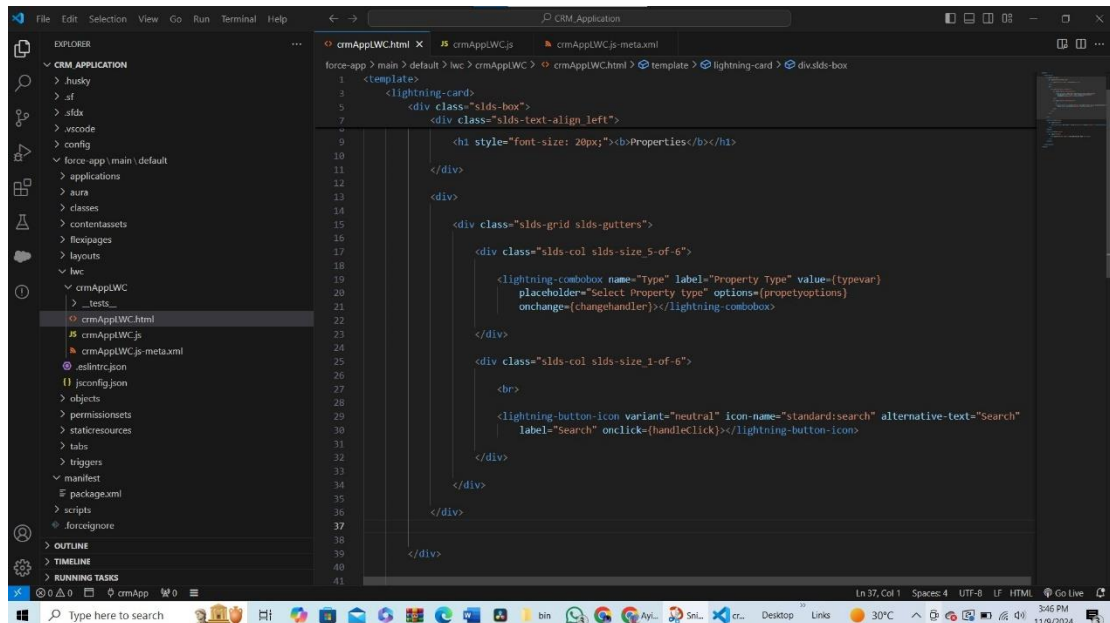
14.5 LWC-js
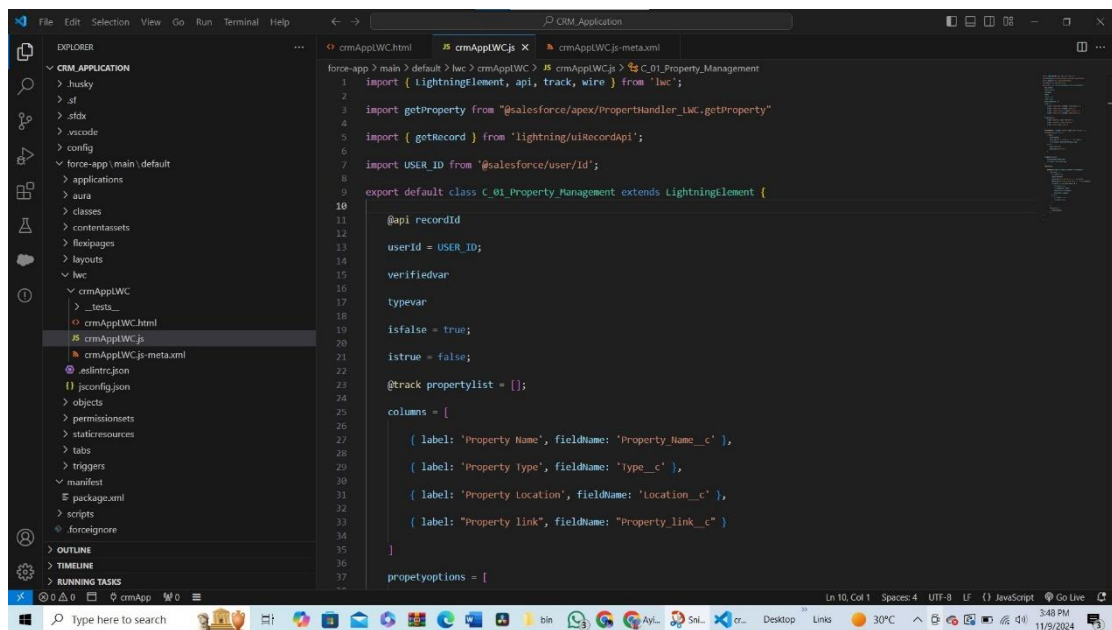
14.6 LWC- meta
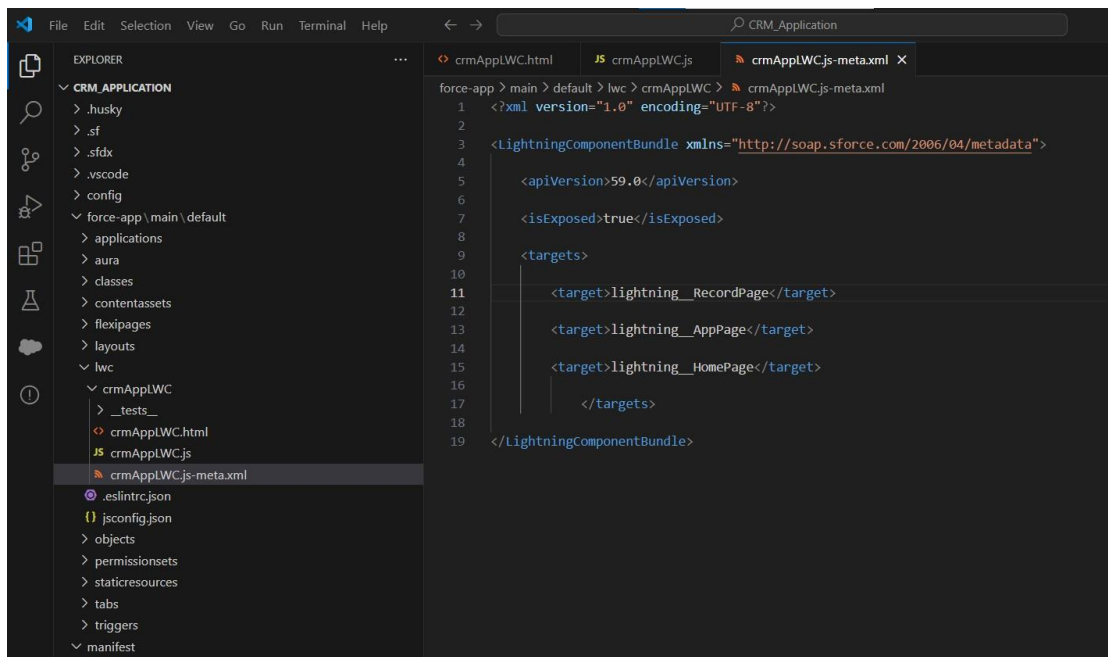
14.7 LWC- Depolyment

15 Drag This Component To Your App Page.

16 Give Access Of Apex Classes To Profiles.

17 Final Pages

17.1 Customer page

17.2 Property Page

17.3 Search PropertyPage

17.4 Final Jotform Table