

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

1. CUSTOMER RELATIONSHIP MANAGEMENT

Customer Relationship Management (CRM) is a strategy for managing a company's interactions with current and potential customers. It involves using technology to organize, automate, and synchronize sales, marketing, customer service, and technical support. The goal of CRM is to improve business relationships, streamline processes, and increase profitability. CRM systems compile customer data from various channels, including a company's website, telephone, email, live chat, and social media. These systems can give staff detailed information about customers' personal information, purchase history, preferences, and concerns. Effective CRM helps businesses understand customer needs, enhance customer satisfaction, and foster loyalty.

2. OVERVIEW

Dreams World Properties integrates Salesforce to streamline customer interactions. Website engagement triggers automated record creation in Salesforce, capturing customer details and preferences. Salesforce categorizes users as approved or non-approved, offering tailored property selections to approved users. This enhances user experience and efficiency, providing personalized recommendations and broader listings. Seamless integration optimizes operations, improving customer engagement and facilitating growth in the real estate market.

3. USE CASE

Dreams World Properties is embarking on a transformative journey by integrating Salesforce into their business operations to streamline customer interactions. With the aim of enhancing user experience and efficiency, the company seeks to automate its processes seamlessly. One of the primary objectives is to establish a seamless connection between their website and Salesforce platform.

Upon a customer expressing interest on the website, an automated system will trigger the creation of a corresponding record within the Salesforce database. This record will serve as a comprehensive profile capturing essential details about the prospective customer and their expressed preferences.

Furthermore, Through Salesforce's robust capabilities, Dreams World Properties intends to categorize users into two distinct categories: approved and non-approved. Approved users will enjoy privileged access to a curated selection of properties tailored to their preferences and requirements. On the other hand, non-

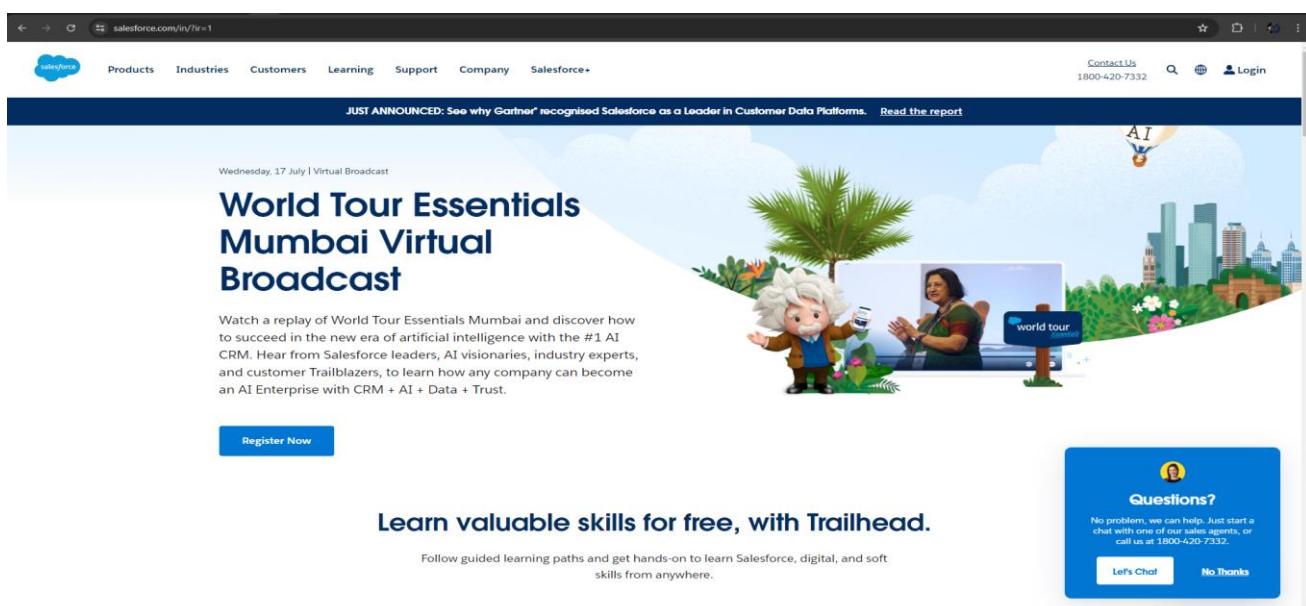
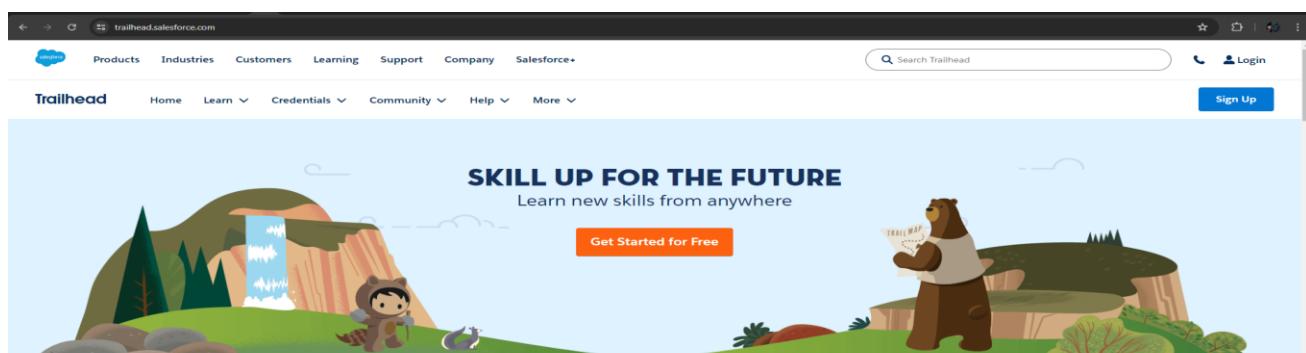
approved users will still have access to a broader range of property listings but may not benefit from the personalized experience offered to approved users.

4. INTRODUCTION TO SALESFORCE

Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

WHAT IS SALESFORCE?

Salesforce is your customer success platform, designed to help you sell, service, market, analyse, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.



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5. REQUIREMENTS: -

i. Website Integration Requirements:

Implement a form on the website for users to express interest in property listings. Ensure the form captures essential details such as name, contact information, preferred property type, location, budget, etc. Set up validation rules to ensure data accuracy and completeness. Integrate the form submission process with Salesforce.

ii. Salesforce Configuration Requirements:

Set up Salesforce objects and fields to store customer data. This includes fields for name, contact information, preferences, approval status, etc. Define workflows or processes to automate the creation of records when a user submits the form on the website. Implement validation rules and data integrity checks to maintain data quality. Configure Salesforce security settings to control access to customer records based on approval status.

iii. Approval Process Requirements:

Define criteria for categorizing users as approved or non-approved based on specific parameters such as budget, property preferences, etc. Implement an approval process in Salesforce to review and approve users. Set up email notifications or alerts to notify relevant stakeholders when a user is approved or rejected. Ensure that approved users are granted access to curated property listings tailored to their preferences.

iv. User Experience Requirements:

Design user interfaces in Salesforce for managing customer records, approval processes, and property listings. Ensure a seamless user experience for both customers and internal users interacting with Salesforce. Provide training and documentation for internal staff on how to use the Salesforce system effectively.

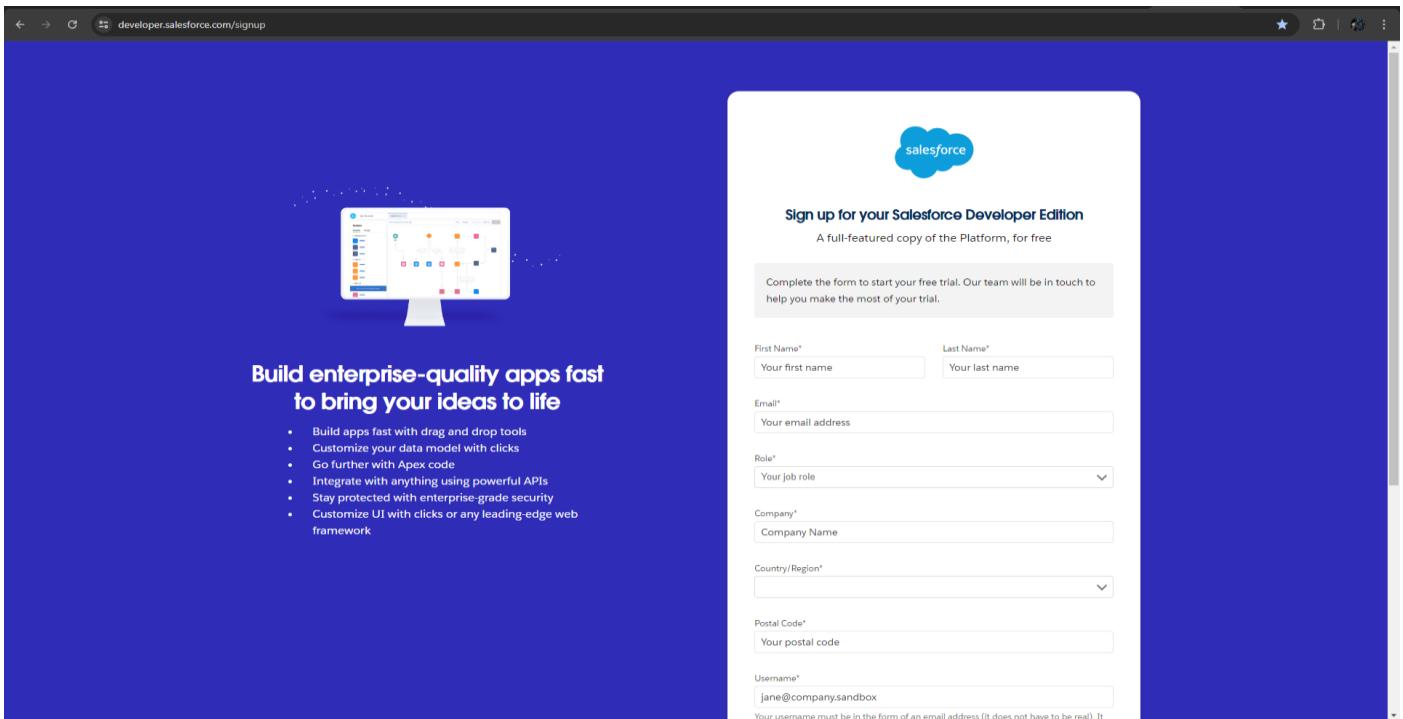
v. Integration Testing and Quality Assurance Requirements:

Conduct thorough testing of the integration between the website and Salesforce to ensure data is accurately captured and transferred. Perform end-to-end testing of the approval process to verify that users are categorized correctly and granted appropriate access. Identify and resolve any issues or bugs encountered during testing.

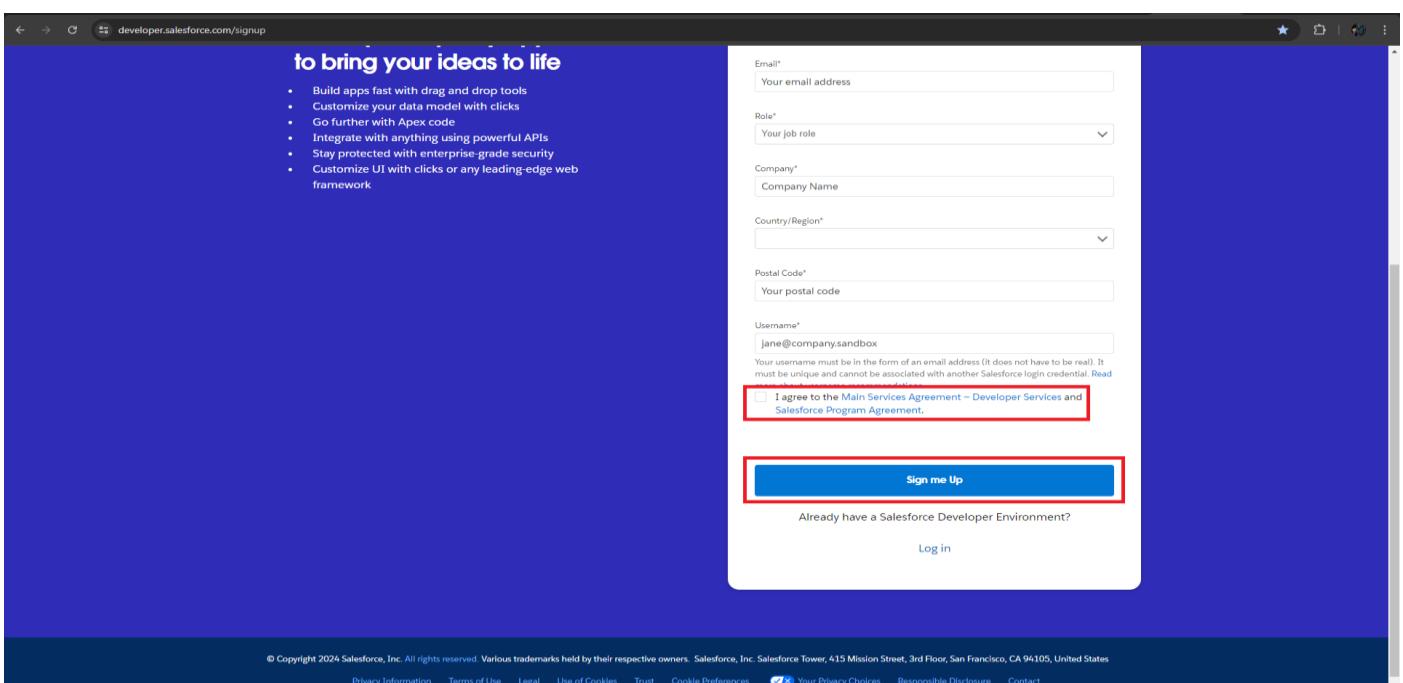
6. PROJECT IMPLEMENTATION: -

Step 1: Creating a Developer Org Account.

- Go to <https://developer.salesforce.com/signup>.



- Fill the details to create a Developer Org Account.
- All the details are must to ensure seamless experience for creating a Developer Org Account.
- One Point to Note that Username must be unique, and you can create any number of accounts using the same E-mail address.

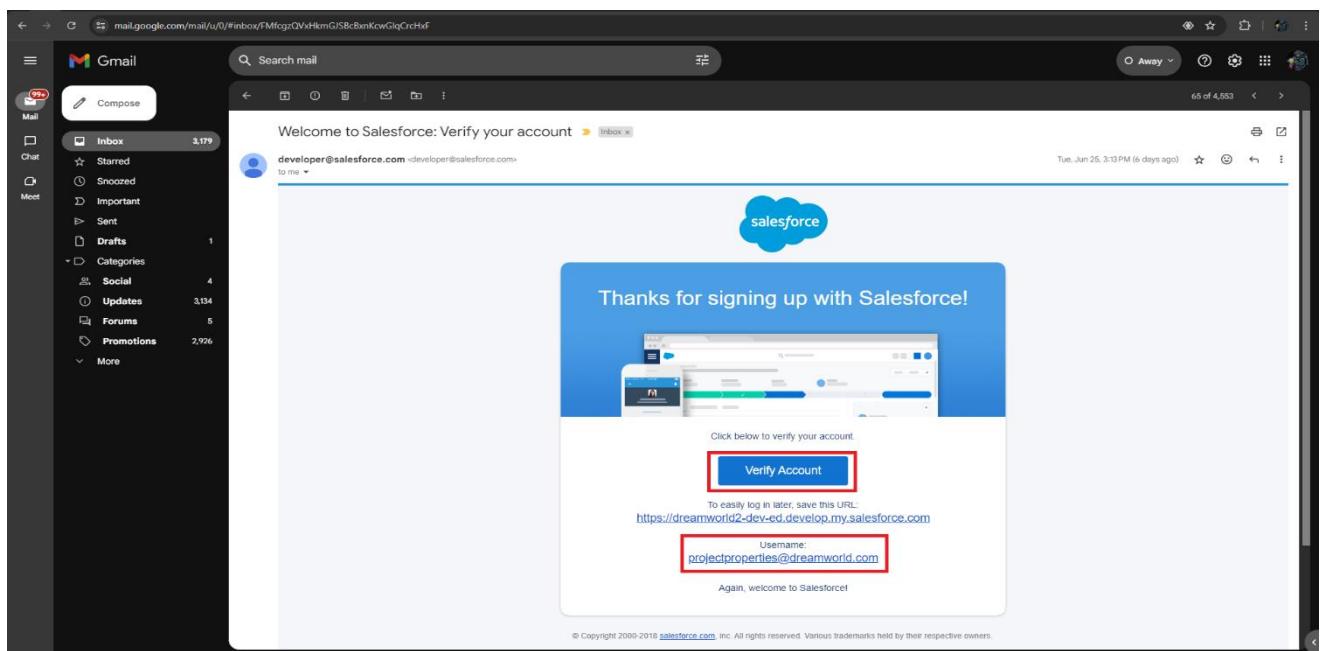


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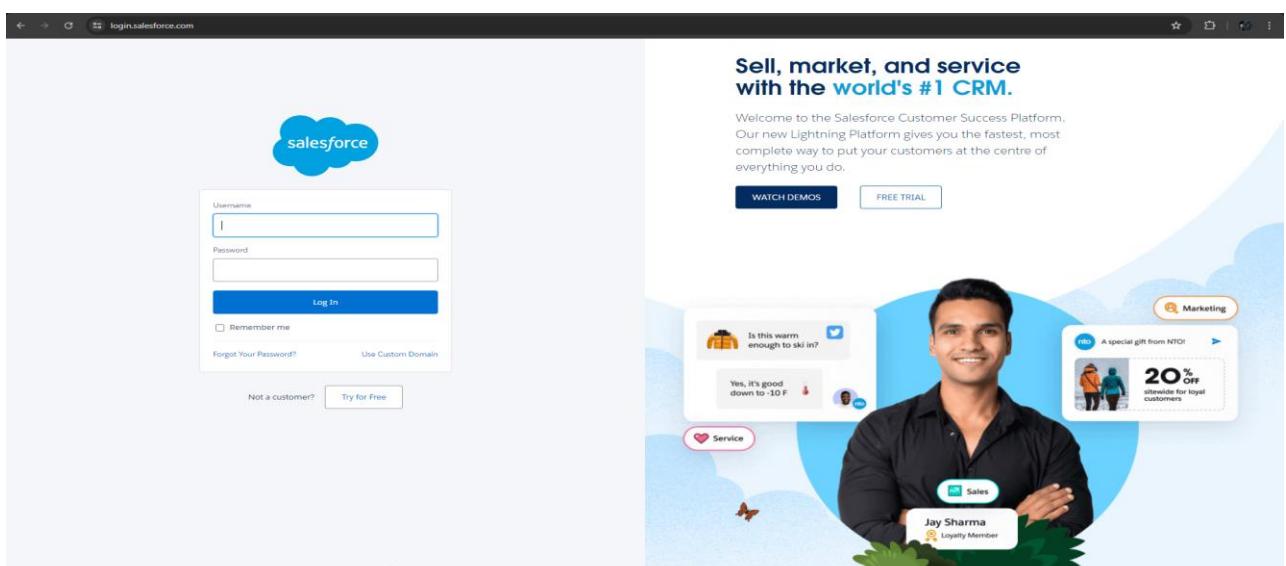
- After Entering the Details proceed with accepting the Terms and Conditions and click on Sign me Up button as shown in above picture.

Step 2: Activation of Developer Org Account.

- After clicking on Sign me Up button it will re-directs to page where it shows that account has created.
- Go to the registered email address inbox that you used while signing up. The activation of account e-mail could take 10-15 minutes to receive to the registered email address.



- Click on the verify account to activate your account.
- Give a password and answer a security question and click on change password.
- Then you will be re-directed to login page to login into Salesforce Developer Org.



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Step 3: Create a jotform and integrate it with the org to create a record of customers automatically.

- Go to <https://www.jotform.com/>.

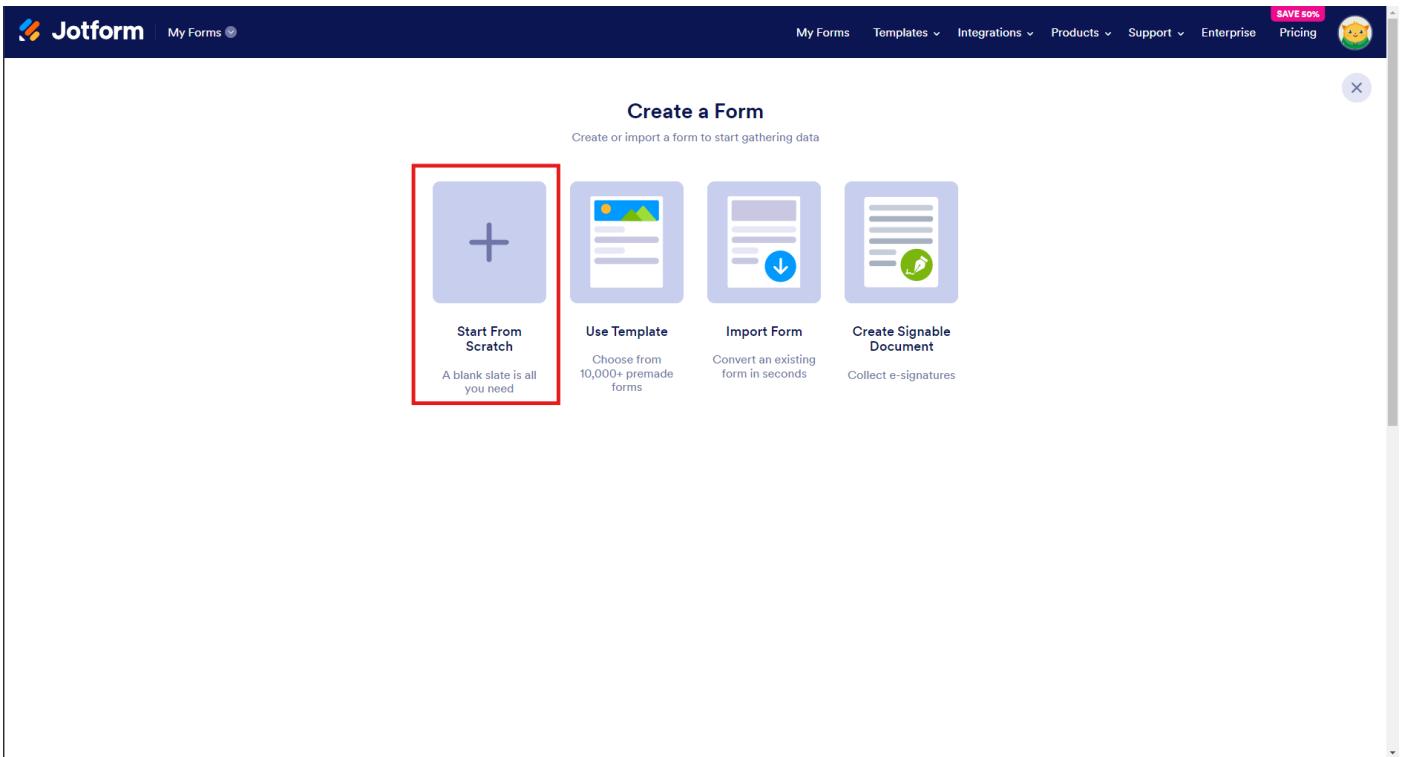
The screenshot shows the Jotform homepage. At the top, there's a navigation bar with links for 'My Forms', 'Templates', 'Integrations', 'Products', 'Support', 'Enterprise', 'Pricing', 'Login', and 'Sign Up for Free'. Below the navigation, a banner reads 'EASIEST ONLINE FORM BUILDER' and 'Powerful forms get it done.' A subtext below the banner says, 'We believe the right form makes all the difference. Go from busywork to less work with powerful forms that use conditional logic, accept payments, generate reports, and automate workflows.' There are three main illustrations: one of a person working on a laptop with a cat, another showing sign-up options like 'Sign Up with Google', 'Sign Up with Microsoft', and 'Sign Up with an email', and a third of a person working on a laptop with a checkmark icon. Below these, a section titled 'See why Jotform is trusted by 25+ million users' displays logos and ratings for Capterra (4.7), Software Advice (4.6), Product Hunt (4.9), and TrustRadius (4.4).

- Create an account using your credentials.
- After creating an account create a form that looks like below picture.

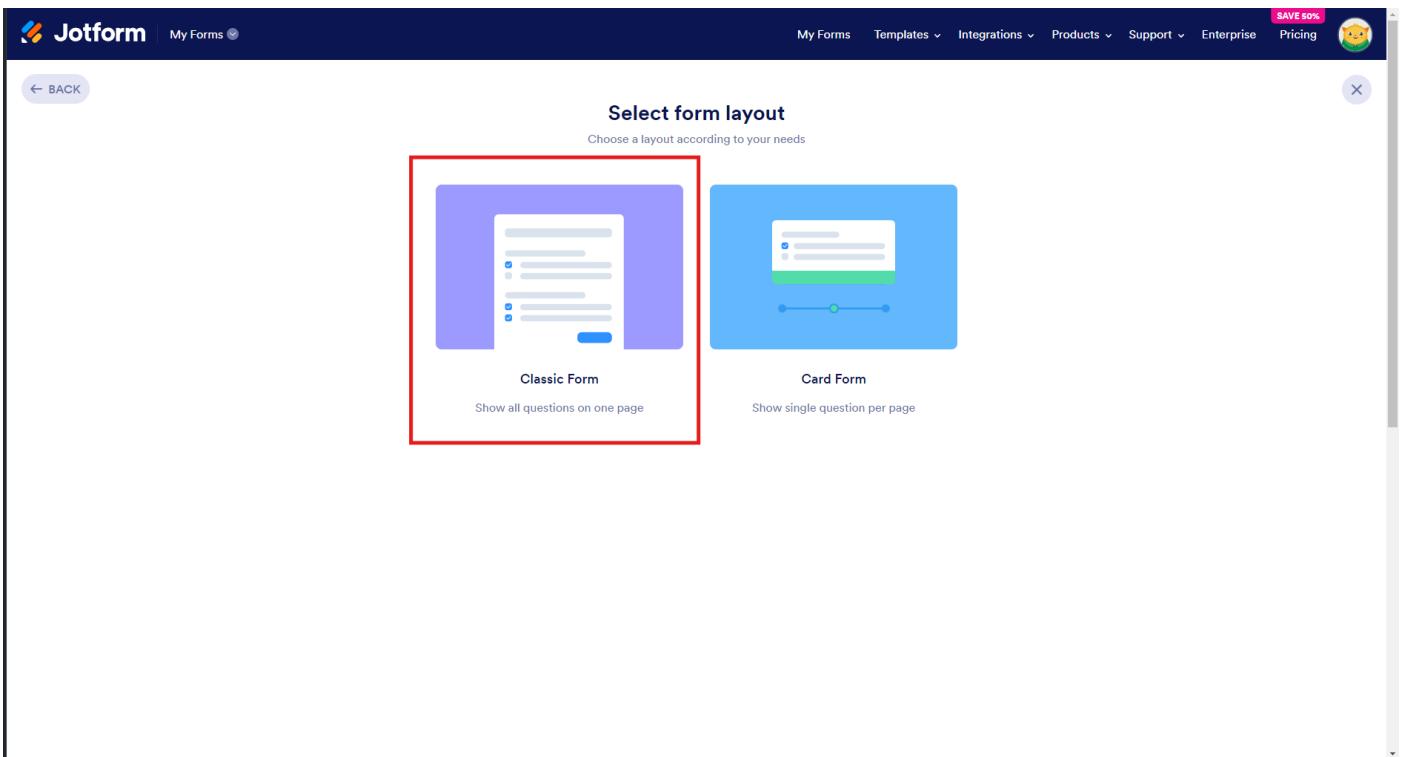
The screenshot shows the Jotform dashboard. On the left, there's a sidebar with sections for 'MY FORMS' (containing 'All Forms' and 'Create folder'), 'MY TEAMS' (containing 'Create team'), 'SHARED WITH ME', 'ASSIGNED FORMS', and 'My Drafts'. At the bottom of the sidebar are links for 'Favorites', 'Archive', and 'Trash'. The main area has a 'CREATE FORM' button highlighted with a red box. Above the main area, there's a banner for 'SUMMER SALE SAVE 50%' with a 'Upgrade now' button. To the right of the banner are buttons for 'Last Edit' and 'Search My Forms'. In the center, there's a preview of a form titled 'Dreams World' with a note that it has 20 submissions and was last edited on June 28, 2024.

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- Click on the “Start from Scratch” button to create a form as shown in the figure below.



- Click on “Classic form” button as shown in the figure below.



- Click on the “Add Form Element” button as shown in the below figure.

The screenshot shows the Jotform Form Builder interface. At the top, there's a navigation bar with the Jotform logo, 'Form Builder', 'Created at 10:18 AM', 'Add Collaborators', 'Help', and a user icon. Below the navigation is a toolbar with 'BUILD', 'SETTINGS', and 'PUBLISH' buttons. A red box highlights the 'Add Form Element' button and the '+' icon next to it. The main workspace is titled 'Form' and contains a dashed box with the text 'Drag your first question here from the left.' and a green 'Submit' button below it. At the bottom, there's a footer with the Jotform logo, 'Now create your own Jotform - It's Free', and a 'Create your own Jotform' button.

- Drag and drop the required elements to create the Jotform to gather the customer details like name, phone number, address, email address etc.
- Click on the publish button and copy the link to access the form.

This screenshot shows the Jotform Form Builder interface with the 'Form Elements' sidebar open. The sidebar has tabs for 'BASIC', 'PAYMENTS', and 'WIDGETS', with 'BASIC' selected. A red box highlights the 'BASIC' tab and the sidebar itself. The main workspace is identical to the one in the previous screenshot, featuring a 'Form' title, a dashed box for questions, and a green 'Submit' button. The top navigation bar, toolbar, and footer are also present. The 'PUBLISH' button at the top of the workspace is also highlighted with a red box.

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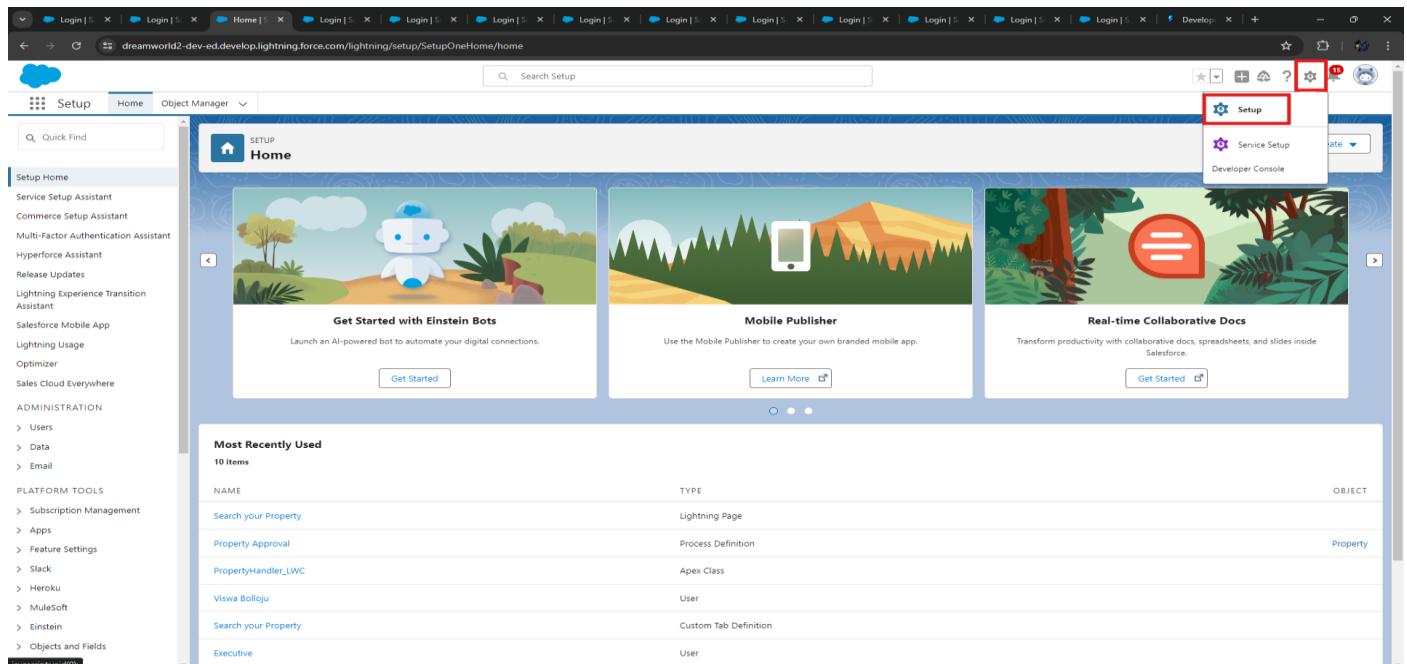
- The below figure is the result of the Jotform after dragging the elements.

- Here is the reference link for the above Jotform: <https://www.jotform.com/form/241762098658065>.

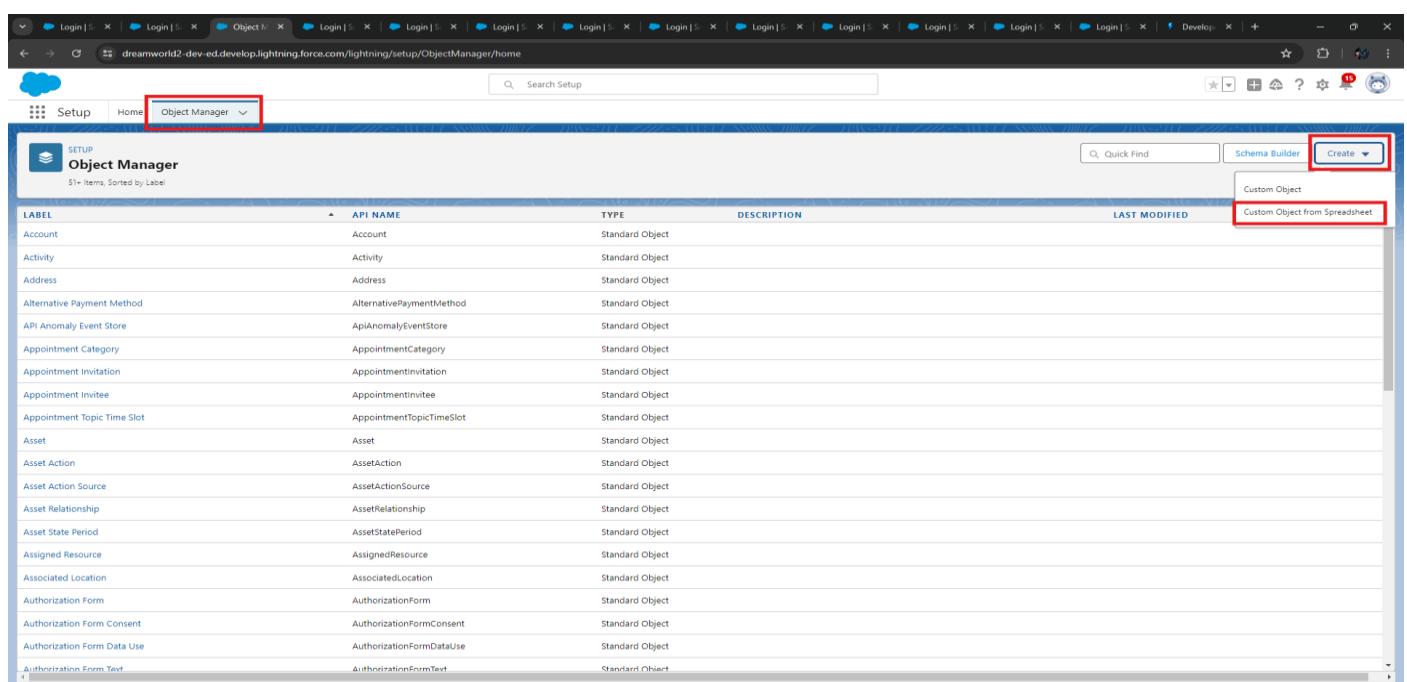
Step 4: Create Objects from Spreadsheet.

A. Creating customer Object.

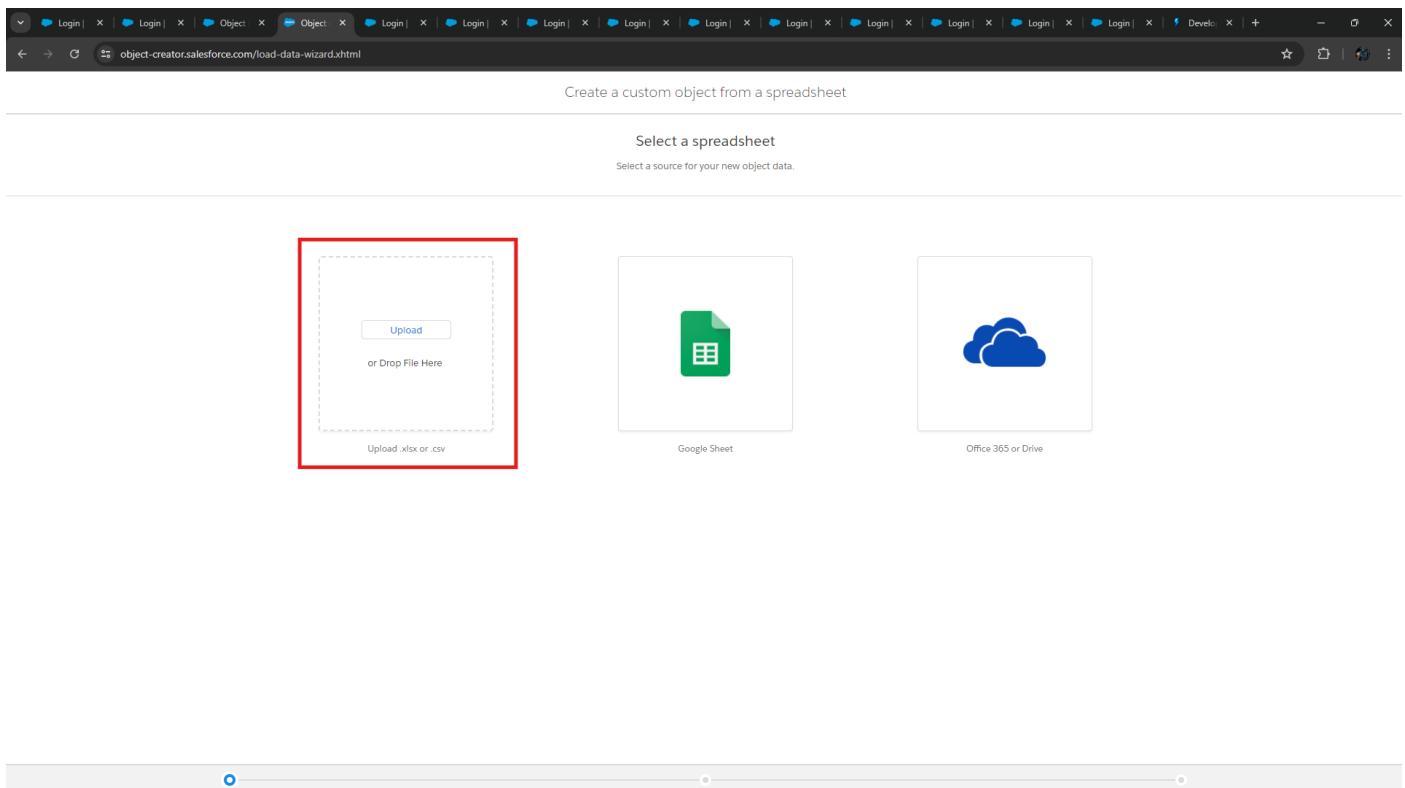
- I have created **Customer** object using the spreadsheet link: [customer](#).
- After downloading the spreadsheet, go to Salesforce developer Org and login into the account you have created.
- Click on gear icon  and Click on Setup.



- Click on “Object Manager” and click on “Create” and click on “Custom Object from Spreadsheet” as shown in the below figure.



- Click on the “Upload” to upload the customer spreadsheet “customer” you have downloaded.



- Check all the fields that are mapped correctly and click on next.

Note: Do not Change any fields type in the “**Salesforce Field Type**” as it won’t upload all the records from the Spreadsheet. If you do change the field type, then the records won’t upload and leads to manual creation of records after the Object Creation.

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS	FIELD PREVIEW
Customer	Customer	Text	<input checked="" type="checkbox"/>	Rakesh
Phone Number	Phone Number	Integer	<input checked="" type="checkbox"/>	788797
Email	Email	Email	<input checked="" type="checkbox"/>	rakesh@gmail.com
State	State	Text	<input checked="" type="checkbox"/>	Telangana
Property Type	Property Type	Text	<input checked="" type="checkbox"/>	Residential
Budget Amount	Budget Amount	Integer	<input checked="" type="checkbox"/>	4000000
Street Address	Street Address	Text	<input checked="" type="checkbox"/>	gb road
Street Address line 2	Street Address line 2	Text	<input checked="" type="checkbox"/>	street no 45
City	City	Text	<input checked="" type="checkbox"/>	Hyderabad
postal code	postal code	Text	<input checked="" type="checkbox"/>	555001
Verified	Verified	Text	<input type="checkbox"/>	checked

- After reviewing the fields that are mapped to salesforce fields click on “**Next**” and review the “**Label**” and “**API Name**”. Click on “Finish” to create the “customer” object.

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Label: customer

API Name: customer

Create a custom object from a spreadsheet

Object properties

Almost finished! Time to define your object's attributes.

* Label
Customer

* Plural Label
Customer

* API Name ⓘ
Customer

Object Description

> Advanced Settings

Back

Finish

B. Creating Property Object

- In the same way as “customer” Object create the property Object.
- Property Object Spreadsheet: [Property](#). Download the spreadsheet and do the same procedure as the customer object.
- After reviewing the fields that are mapped to salesforce fields click on “Next” and review the “Label” and “API Name”. Click on “Finish” to create the “customer” object.

Label: property

API Name: property

- Do remember the Note while creating the “property” object.

C. Changing the Custom Object Fields type in “customer” and “property” object.

- Click on “Object Manager” and search the for objects you have created.

LABEL	API NAME	TYPE	DESCRIPTION	LAST_MODIFIED	DEPLOYED
Customer	Customer_c	Custom Object	Dreams World Customers	28/06/2024	✓
Property	Property_c	Custom Object	Dreams World Properties	28/06/2024	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			
Work Plan	WorkPlan	Standard Object			
Work Order Line Item	WorkOrderLineItem	Standard Object			
Work Order	WorkOrder	Standard Object			
Web Store Inventory Source	WebStoreInventorySource	Standard Object			
Store Catalog	WebStoreCatalog	Standard Object			
Store Buyer Group	WebStoreBuyerGroup	Standard Object			
Store	WebStore	Standard Object			
Cart Adjustment Group	WebCartAdjustmentGroup	Standard Object			
Cart Adjustment Basis	WebCartAdjustmentBasis	Standard Object			
Cart	WebCart	Standard Object			

- Go to **customer** object and click on “**Fields and Relationships**” and change all the fields to the marked fields as shown in the figure below.

FIELDS & RELATIONSHIPS	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Budget Amount	Budget_Amount_c	Currency(18, 0)		
Lightning Record Pages	City	City_c	Text(255)		
Buttons, Links, and Actions	Created By	CreatedBy	Lookup(User)		
Compact Layouts	Customer First Name	Name	Text(80)		✓
Field Sets	Customer Last Name	Customer_Last_Name_c	Text(255)		
Object Limits	Email	Email_c	Email		
Record Types	Last Modified By	LastModifiedBy	Lookup(User)		
Related Lookup Filters	Owner	OwnerId	Lookup(User,Group)		
Search Layouts	Phone Number	Phone_Number_c	Phone		
List View Button Layout	Postal Code	Postal_Code_c	Text(255)		
Restriction Rules	Property Type	Property_Type_c	Picklist		
Scoping Rules	State	State_c	Text(255)		
Triggers	Street Address	Street_Address_c	Text(255)		
Flow Triggers	Street Address line 2	Street_Address_line_2_c	Text(255)		
Validation Rules	Verified	Verified_c	Checkbox		

- In the same way change the field type in **property** object.

The screenshot shows the Salesforce Object Manager interface. In the top left, there's a sidebar with various setup categories like Details, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and lists eight items. The columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. A red box highlights the 'Fields & Relationships' section in the sidebar and the 'Data Type' column in the main table.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(255)		
Owner	OwnerId	Lookup(User, Group)		✓
Property	Name	Text(80)		✓
Property Name	Property_Name__c	Text(255)		
Type	Type__c	Text(255)		
Verified	Verified__c	Checkbox		

Step 5: Integrate Jotform with Salesforce Platform.

- Log in to Jotform account and click on “**My Forms**” and click on “**Integrations**” and select “**CRM**” option and click on “**Salesforce**” as shown in the below figure.

The screenshot shows the Jotform dashboard. On the left, there's a sidebar with options like Create Form, My Forms, My Teams, Shared with Me, Assigned Forms, My Drafts, Favorites, Archive, and Trash. The main area shows a form titled 'Dreams World' with 20 submissions. At the top, there's a 'SUMMER SALE SAVE 50%' banner. The 'Integrations' menu is open, showing sections for CRM, Storage, Payment, and Email. Under CRM, 'Salesforce' is highlighted with a red box. Other options include Hubspot, Zoho CRM, Pipedrive, Insightly, Zendesk, Keap, and EngageBay.

- Click on “**Use Integration**” and go to “**Add to Form**”.

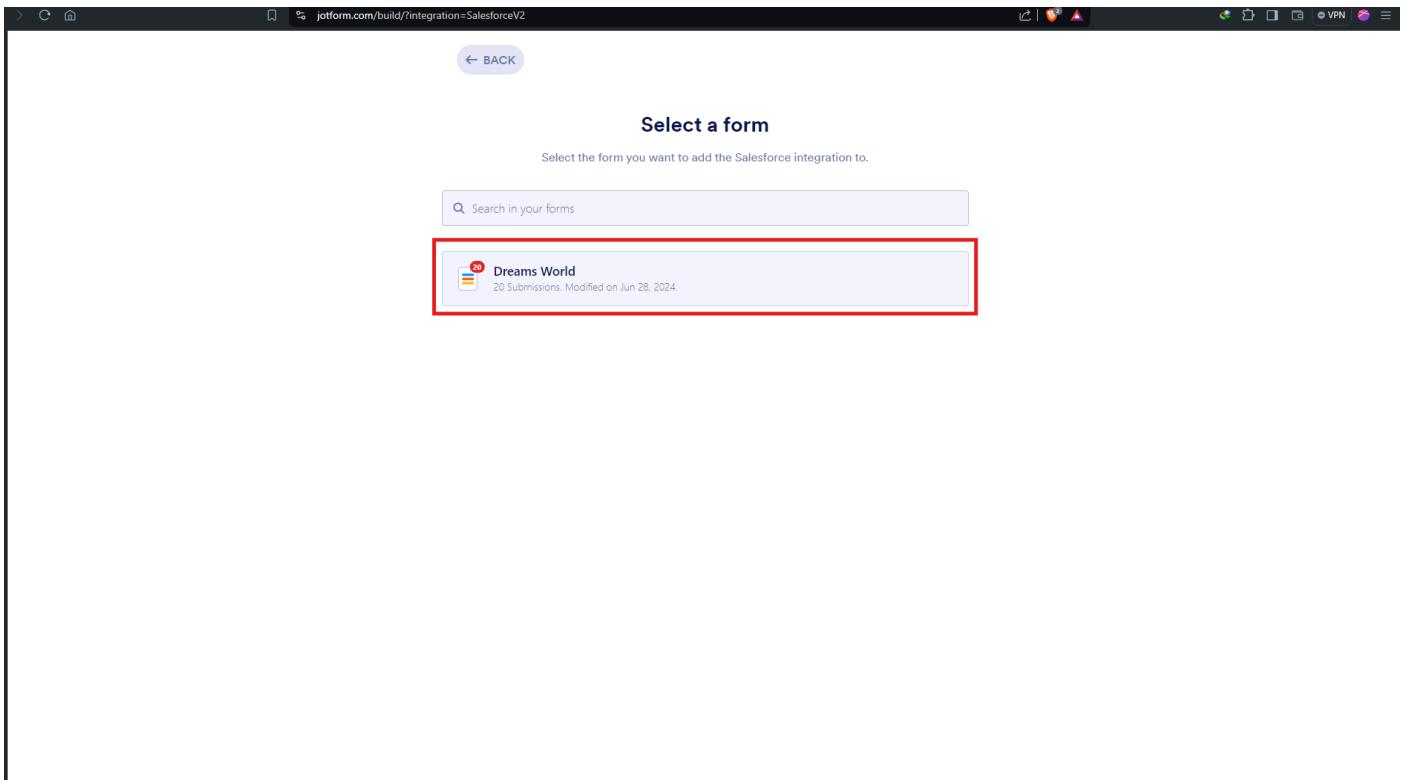
The screenshot shows the Jotform integration page for Salesforce. At the top, there's a green button labeled "Use Integration" with a red box around it. To its right is a "Watch Video" button. Below these are two small buttons: "Go to AppExchange" and "Add to Form". The main area features a diagram showing a "Sales Contact Form" on the left and a "Contact Details" screen on the right, connected by arrows indicating data flow between them. The Jotform logo is at the top left, and the Salesforce logo is at the top right. A sidebar on the left lists various categories like Analytics & Reporting, Automation, Blogging, CMS, CRM, Communication, Data Management, E-Signature, E-commerce, Emailing, File Sharing & Storage, GEO & Mapping, Marketing & Sales, Payment Processor, Project Management, SSO, and Social Media. A sidebar on the right lists other integrations: ActiveCampaign, Pipedrive, Highrise, ClinchPad, Platform.Jy, and noCRM.io. At the bottom right of the main area is a "Add New Integration" button.

- Click on “Select a Form”.

The screenshot shows the "Add the Salesforce integration to a form" page. The title is centered at the top. Below it is a sub-instruction: "Send form responses to Salesforce". There are three options at the bottom: "Select a Form" (highlighted with a red box), "Create a Form", and "Use Template".

- Select the form that you have created using “Step - 3”.

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- Scroll down and click on “**Authentication**” and login into Salesforce Developer Org using your credentials and select your account which you want to integrate the Jotform.

A screenshot of the Jotform 'Settings' page for a form named 'Dreams World'. The page has a header with the form name and a 'Build' tab selected. On the left, there's a sidebar with various settings options like 'Form Settings', 'Emails', 'Conditions', 'Thank You Page', and 'Integrations'. The 'Integrations' option is highlighted with a red box. The main content area shows a section titled 'Use Jotform without leaving Salesforce' with a 'Get the App — It's Free!' button. Below this, there's information about connecting to Salesforce, a list of actions like 'Add new company leads', and a section for 'Authentication' where a 'Select a Salesforce account' dropdown is shown, also highlighted with a red box. At the bottom right, there's a 'Give Feedback' button.

- Select the Options as shown in the below figure and “**Select a Salesforce Object**” type “**Customer**” to get customer object.

The screenshot shows the Jotform integration setup for Salesforce. On the left sidebar, the 'INTEGRATIONS' section is highlighted with a red box. In the main area, the 'SALESFORCE' integration is selected. Under 'Select an action', the 'Create a record' option is chosen, with a note: 'Generate a new record or update an existing record'. Under 'Select a Salesforce Object', 'Customer' is selected. At the bottom right, there are 'CANCEL' and 'SAVE ACTION' buttons.

- Map the fields as shown in the figure below and click on “Save Action”.

The screenshot shows the Jotform integration setup for Salesforce with field mappings. The 'Object Fields' column lists Jotform fields like 'Customer First Name', 'Customer Last Name', 'Email', etc., and the 'Dreams World' column lists corresponding Salesforce fields like 'Name - First Name', 'Name - Last Name', 'Email', etc. A red box highlights the entire field mapping grid. Below the grid, there is an 'Update an existing record' section with an 'OFF' toggle switch. At the bottom are 'CANCEL' and 'SAVE ACTION' buttons.

- Click on the “Save Integration” button to Integrate the Jotform into the Salesforce.

The screenshot shows the Jotform interface for integrating with Salesforce. On the left sidebar, there are several options: FORM SETTINGS, EMAILS, CONDITIONS, THANK YOU PAGE, INTEGRATIONS, APPROVAL FLOWS, JOTFORM SIGN, and MOBILE NOTIFICATIONS. The main area displays the 'SALESFORCE' integration settings. It shows a single action: 'Create a record Customer'. At the bottom right of this section, there is a green 'SAVE INTEGRATION' button, which is highlighted with a red box.

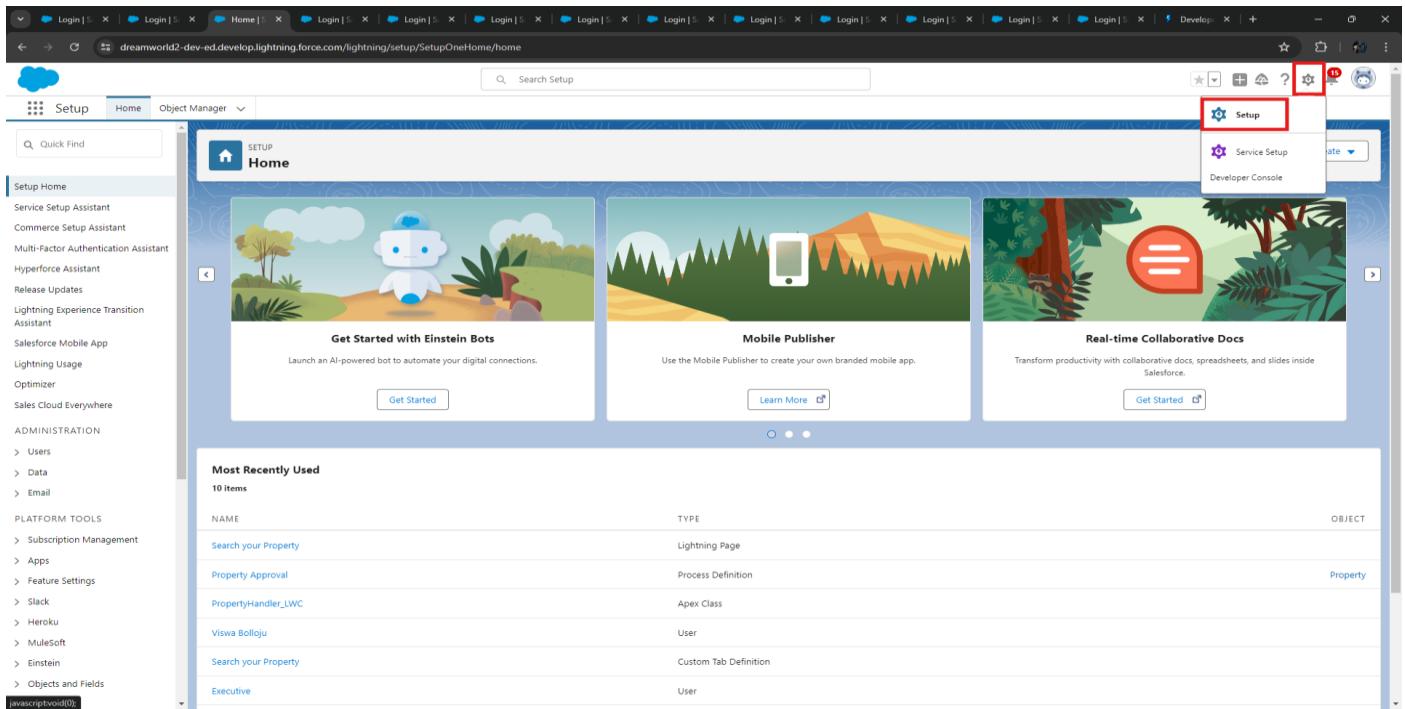
- Click on “Finish”.

The screenshot shows the Jotform interface after the integration has been successfully created. The main area displays a confirmation message: 'Integration ready! You have successfully created your integration.' Below this message is a green 'FINISH' button, which is highlighted with a red box.

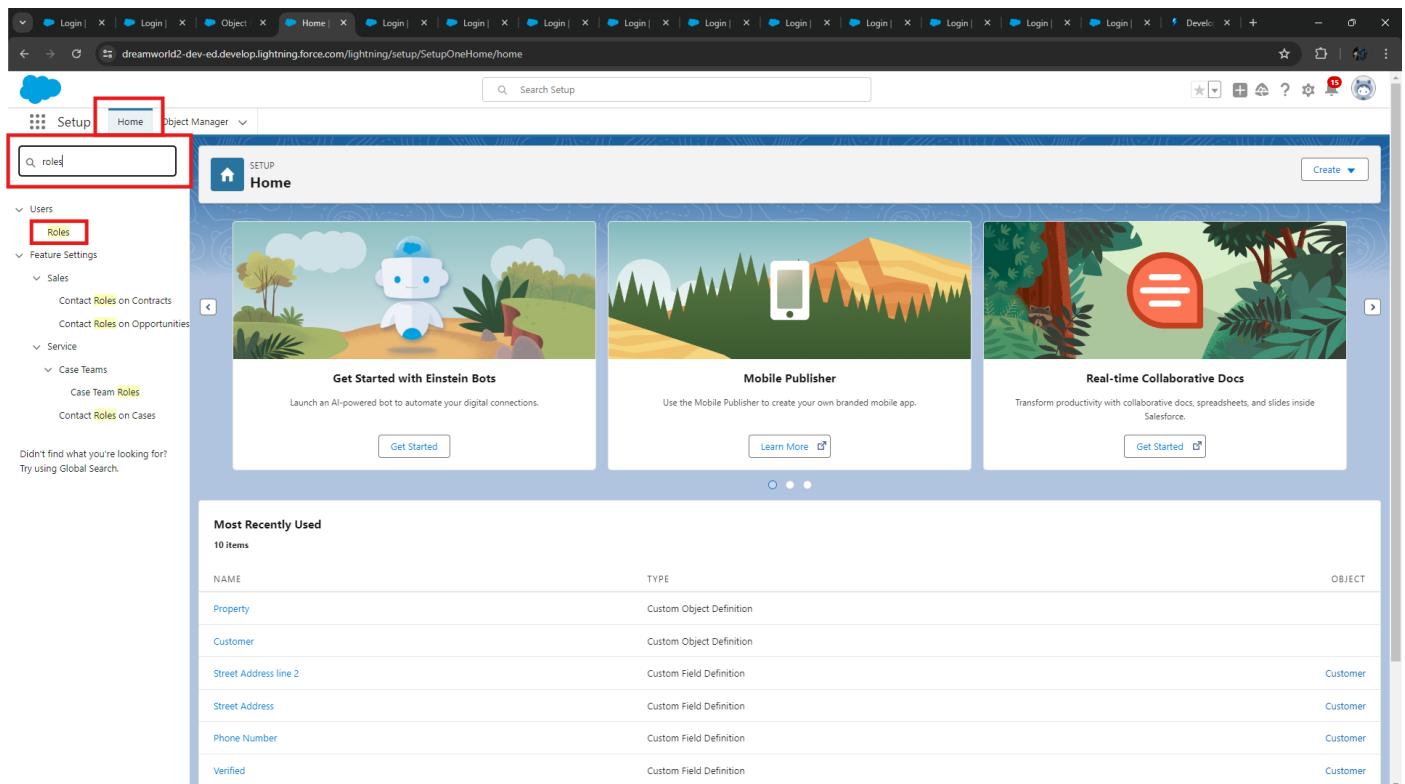
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Step 6: Create Roles

- Click on gear icon  and Click on Setup.



- Click on “Home” and search in “quick Find” search box and search for “Roles”.



- Click on “Set Up Roles” as shown in the figure below.

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The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with navigation links like 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The 'Roles' link is highlighted. Below the sidebar, there's a search bar and a 'Help for this Page' link.

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data. Sample Role Hierarchy: View other sample Role Hierarchies: Territory-based Sample.

The diagram illustrates a role hierarchy:

```

graph TD
    CEO[CEO President] --> CFO[CFO VP Sales]
    CFO --> ESD[Eastern Sales Director]
    CFO --> WSD[Western Sales Director]
    ESD --> ESR[Eastern Sales Rep]
    WSD --> WSR[Western Sales Rep]
    ESR --> ASR[International Sales Rep]
    WSR --> ASR
    ASR --> ASR2[Asian Sales Rep]
    ASR --> ESR2[European Sales Rep]
  
```

Annotations for the roles:

- Executive Staff**: *View & edit data, roll up forecasts, & generate reports for all users directly or at same level.
- CEO President**: *Can't access data of other Executive Staff.
- CFO VP Sales**: *View & edit data, roll up forecasts, & generate reports for all users directly or at same level.
- Eastern Sales Director**: *View & edit data, roll up forecasts, & generate reports for all users directly or at same level.
- Western Sales Director**: *View & edit data, roll up forecasts, & generate reports for all users directly or at same level.
- Eastern Sales Rep**: *View & edit data, roll up forecasts, & generate reports for all users directly or at same level.
- Western Sales Rep**: *View & edit data, roll up forecasts, & generate reports for all users directly or at same level.
- International Sales Director**: *View & edit data, roll up forecasts, & generate reports for all users directly or at same level.
- International Sales Rep**: *View & edit data, roll up forecasts, & generate reports for all users directly or at same level.
- ASR Asian Sales Rep**: *View & edit data, roll up forecasts, & generate reports for all users directly or at same level.
- ESR2 European Sales Rep**: *View & edit data, roll up forecasts, & generate reports for all users directly or at same level.

Set Up Roles button is highlighted with a red box.

- Click on Expand all and Add a Role just below the Sales Representative.

Note: If you don't find “Sales Representative” Role, create one yourself and make sure it has “System Administrator” Profile.

The screenshot shows the 'Creating the Role Hierarchy' section of the Salesforce Setup Roles page. The sidebar and search bar are visible on the left.

Your Organization's Role Hierarchy

Expand All

- Dream World
 - CEO
 - CFO
 - COO
 - SVP, Customer Service & Support
 - Customer Support, International
 - Customer Support, North America
 - Installation & Repair Services
 - SVP, Human Resources
 - SVP, Sales & Marketing
 - VP, International Sales
 - VP, Marketing
 - Marketing Team
 - VP, North American Sales
 - Director, Channel Sales
 - Channel Sales Team
 - Director, Direct Sales

- Click on “Add Role” and enter the details and click on “Save” and create the roles as shown in the figure below.

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Label: Sales Executive and Reports to: Sales Representative.

The screenshot shows the Salesforce Setup Roles page. At the top left is a blue icon with a person symbol and the word "SETUP". To its right is a blue box containing a white person icon and the word "Roles". Below this is a header bar with the text "Role Edit" and "New Role". The main area is titled "Role Edit". It contains four input fields: "Label" with the value "Sales Executive", "Role Name" with the value "Sales Executive", "This role reports to" with the value "Sales Representative", and "Role Name as displayed on reports" which is empty. At the bottom are three buttons: "Save", "Save & New", and "Cancel".

- 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**.
- The below figure shows result after creating the roles.

The screenshot shows the Salesforce Roles page. On the left is a sidebar with navigation links: "Users", "Roles", "Feature Settings", "Sales", "Service", "Case Teams", and "Case Team Roles". The "Roles" link is selected. The main area displays a tree view of roles. A red box highlights the "VP North American Sales" role, which has children: "Corporate Sales", "Channel Sales Team", "Director, Direct Sales", "Eastern Sales Team", and "Western Sales Team". Another red box highlights the "Sales Executive" role, which has children: "Sales Representative", "Sales Manager", and "Customer". Other roles listed include COO, SVP Customer Service & Support, SVP Human Resources, SVP Sales & Marketing, VP International Sales, VP Marketing, Marketing Team, and Installation & Repair Services.

Step 7: Create a Property Details App

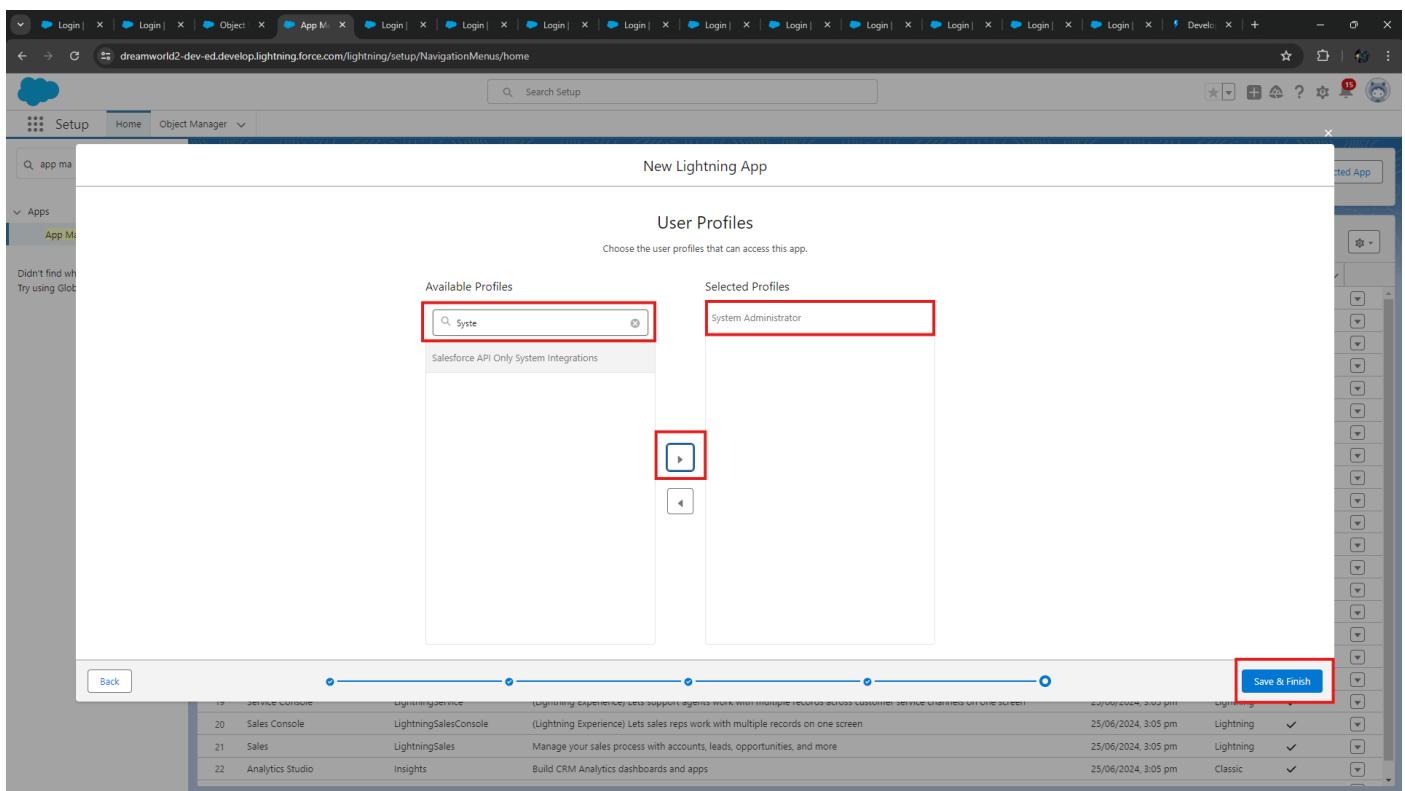
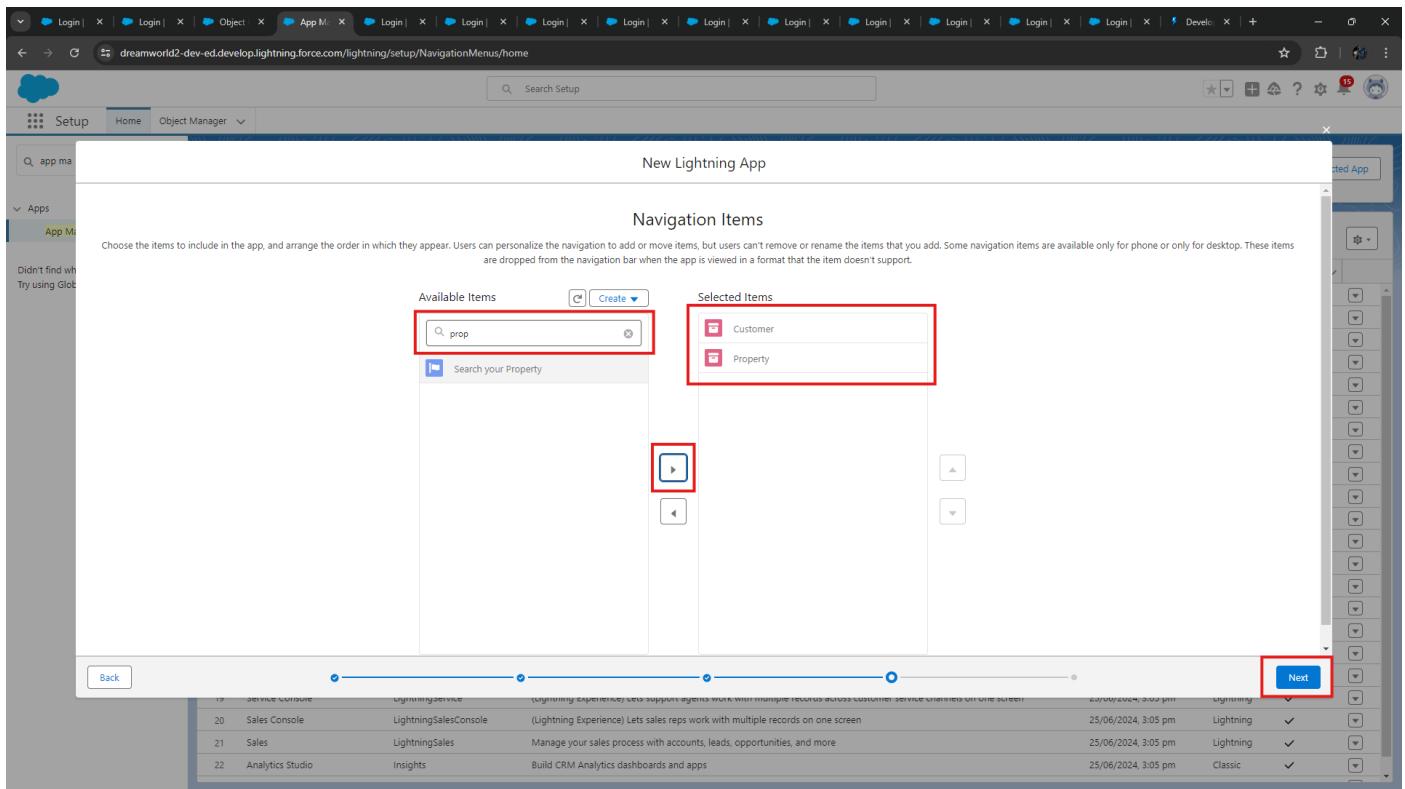
- From Setup, go to “App Manager” and click on “New Lightning App” and Name it as “Property Details” and add “Customer” and “Property” Object.

The screenshot shows the 'Lightning Experience App Manager' page. The top navigation bar includes 'SETUP', 'Home', 'Object Manager', and a search bar. On the left, a sidebar shows 'Apps' and 'App Manager' under 'App Manager'. A red box highlights the 'App Manager' link. In the center, a table lists 23 items, with the first item, 'Property Details', highlighted by a red box. The top right corner of the main content area has a red box around the 'New Lightning App' button.

The screenshot shows the 'New Lightning App' configuration page. It has two main sections: 'App Details' and 'App Branding'. The 'App Details' section contains fields for 'App Name' (highlighted with a red box) and 'Developer Name'. The 'App Branding' section includes an 'Image' field with a placeholder for 'DreamsWorld Properties' logo, a 'Primary Color Hex' field set to '#0070D2', and an 'Org Theme Options' checkbox. Below these sections is an 'App Launcher Preview' showing a card for 'Property Details'. At the bottom right, a red box highlights the 'Next' button.

- Click Next → Next → and add Navigation items and Save and Add “System Admin” Profile.

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- Click on “Save and Finish” to create Lightning App.

App Name	Developer Name	Description	Last Modified Date	App Type	Visible...
1 Property Details	Property_Details	DreamsWorld Properties	28/06/2024, 11:45 pm	Lightning	<input checked="" type="checkbox"/>
2 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	26/06/2024, 2:59 pm	Lightning	<input checked="" type="checkbox"/>
3 Automation	FlowsApp	Automate business processes and repetitive tasks.	25/06/2024, 3:08 pm	Lightning	<input checked="" type="checkbox"/>
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	25/06/2024, 3:07 pm	Lightning	<input checked="" type="checkbox"/>
5 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	25/06/2024, 3:07 pm	Lightning	<input checked="" type="checkbox"/>
6 Queue Management	QueueManagement	Create and manage queues for your business.	25/06/2024, 3:05 pm	Lightning	<input checked="" type="checkbox"/>
7 All Tabs	AllTabSet		25/06/2024, 3:05 pm	Classic	<input type="checkbox"/>
8 Subscription Management	RevenueCloudConsole	Get started automating your revenue processes	25/06/2024, 3:05 pm	Lightning	<input checked="" type="checkbox"/>
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	25/06/2024, 3:05 pm	Lightning	<input checked="" type="checkbox"/>
10 Platform	Platform	The fundamental Lightning Platform	25/06/2024, 3:05 pm	Classic	<input type="checkbox"/>
11 Sales	Sales	The world's most popular sales force automation (SFA) solution	25/06/2024, 3:05 pm	Classic	<input type="checkbox"/>
12 Service	Service	Manage customer service with accounts, contacts, cases, and more	25/06/2024, 3:05 pm	Classic	<input checked="" type="checkbox"/>
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	25/06/2024, 3:05 pm	Classic	<input checked="" type="checkbox"/>
14 App Launcher	AppLauncher	App Launcher tabs	25/06/2024, 3:05 pm	Classic	<input checked="" type="checkbox"/>
15 Community	Community	Salesforce CRM Communities	25/06/2024, 3:05 pm	Classic	<input checked="" type="checkbox"/>
16 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites.	25/06/2024, 3:05 pm	Classic	<input type="checkbox"/>
17 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	25/06/2024, 3:05 pm	Classic	<input checked="" type="checkbox"/>
18 Content	Content	Salesforce CRM Content	25/06/2024, 3:05 pm	Classic	<input checked="" type="checkbox"/>
19 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	25/06/2024, 3:05 pm	Lightning	<input checked="" type="checkbox"/>
20 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	25/06/2024, 3:05 pm	Lightning	<input checked="" type="checkbox"/>
21 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	25/06/2024, 3:05 pm	Lightning	<input checked="" type="checkbox"/>
22 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	25/06/2024, 3:05 pm	Classic	<input checked="" type="checkbox"/>

- The above figure shows the result of creating the Lightning App.

Step 8: Create Profiles

A. Create Customer Profile

- From Setup → Go to “Profiles” and Clone Salesforce Platform User and Name it “Customer”.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	B2B Recording Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Customer	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Prov User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Identity User	Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Gold Partner User	Gold Partner	<input type="checkbox"/>

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The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, there's a navigation sidebar with various categories like Users, Data, Feature Settings, Marketing, Sales, and more. The main area is titled 'Clone Profile' and asks for the name of the new profile. It lists three options: Existing Profile (selected), Standard Platform User, and Salesforce Platform. The 'Profile Name' field contains 'Customer' and is highlighted with a red box. Below the form are 'Save' and 'Cancel' buttons.

- Uncheck all the **Custom Objects** and Check only **Property Details** from Custom App Settings.

The screenshot shows the Salesforce Setup interface under the Profiles section, editing the 'Customer' profile. The left sidebar is similar to the previous screenshot. The main area is titled 'Profile Edit' for the 'Customer' profile. It shows basic profile details like Name (Customer), User License (Salesforce Platform), and Description. A large red box highlights the 'Custom App Settings' section. Under 'Custom App Settings', there are two rows of checkboxes for 'Visible' and 'Default' status. The first row is for 'Analytics Studio (standard__Insights)' and the second for 'App Launcher (standard__AppLauncher)'. In both rows, the 'Visible' checkbox is unchecked and the 'Default' checkbox is checked. To the right of these, another row for 'Platform (standard__Platform)' is partially visible. Below this section are 'Service Provider Access' and 'Tab Settings' sections, which also contain many checkboxes for various objects like Accounts, All Sites, Alternative Payment Methods, etc., many of which are highlighted with red boxes.

- Also Remove all the **Standard Object Permissions**.
- Uncheck all the **Custom Object Permissions** and check **read** and **view all** in “**Property**”

The screenshot shows the Salesforce Setup - Profiles page. Under Standard Object Permissions, there are two main sections: **Standard Object Permissions** and **Custom Object Permissions**. In the **Standard Object Permissions** section, a red box highlights the **Property** object. For the **Property** object, the **Data Administration** checkboxes are checked for **View All** and **Modify All**. In the **Custom Object Permissions** section, another red box highlights the **Property** object, where the **Data Administration** checkboxes for **View All** and **Modify All** are also checked.

- Click on “Save”.

This screenshot shows the same configuration as the previous one, but with the **Save** button highlighted in a red box at the bottom of the page. The rest of the interface is identical to the first screenshot, showing the Standard Object Permissions and Custom Object Permissions sections for the **Property** object.

B. Create Manager Profile

- From Setup → Go to **Profiles** and Clone Salesforce Platform User and Name it “Manager”.
- Uncheck all the **Custom Objects** and Check only “**Property Details**” from Custom App Settings.

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The screenshot shows the 'Profiles' section of the Salesforce Setup. On the left, a sidebar lists various setup categories like Users, Data, Feature Settings, etc. The 'Profiles' section is selected. In the main area, a profile named 'Manager' is being edited. The 'Custom App Settings' section contains several tabs, one of which is 'Property Details (Property_Details)'. This tab's visibility setting is highlighted with a red box and is set to 'Default On'.

- Make sure custom tab settings are “Default on” for both “Customer” & “Property”.

This screenshot shows the 'Profiles' page again, but with a different focus. The 'Custom Tab Settings' section is highlighted with a red box. It contains two dropdowns: 'Customer' and 'Property', both set to 'Default On'. Below this, another red box highlights the 'Visible' dropdown for the 'Data Mask Sessions' tab, which is set to 'Tab Hidden'.

- Also Remove all the Standard Object Permissions.
- Uncheck all the Custom Object Permissions and check only “modify all” from “Property” and “Customer”.

- Scroll down and click on “Save”.

Step 9: Create a CheckBox field on user

- Setup → Object Manager → Search for “User” → Fields and Relationships.

- Click on “New” to create a new Field.

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Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
User Page Layouts	About Me	AboutMe	Text Area(1000)		
User Profile Page Layouts	Active	IsActive	Checkbox		
Lightning Record Pages	Address	Address	Address		
Buttons and Links	Admin Info Emails	ReceivesAdminInfoEmails	Checkbox		
Compact Layouts	Alias	Alias	Text(8)		
Field Sets	Allow Forecasting	ForecastEnabled	Checkbox		
Object Limits	Banner Photo	BannerPhotoId	Lookup(Photo)		
Related Lookup Filters	Call Center	CallCenterId	Lookup(Call Center)		
Search Layouts	Chatter Email Highlights Frequency	DigestFrequency	Picklist		
List View Button Layout	Company Name	CompanyName	Text(80)		
Triggers	Contact	ContactId	Lookup(Contact)		
Flow Triggers	Data.com Monthly Addition Limit	JigsvImportLimitOverride	Number(8, 0)		
Validation Rules	Default Notification Frequency when Joining Groups	DefaultGroupNotificationFrequency	Picklist		
	Delegated Approver	DelegatedApproverId	Lookup(User,Group)		
	Department	Department	Text(80)		
	Division	Division	Text(80)		
	Email Encoding	EmailEncodingKey	Picklist		
	Email Sender Address	SenderEmail	Email		
	Email Sender Name	SenderName	Text(80)		

- Create new Field Named as “Verified” as Data type “CheckBox”.

User
New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date Allows users to enter a date or pick a date from a popup calendar.

Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number Allows users to enter any number. Leading zeros are removed.

Percent Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Phone Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist Allows users to select a value from a list you define.

Picklist (Multi-Select) Allows users to select multiple values from a list you define.

Text Allows users to enter any combination of letters and numbers.

URL Allows users to enter up to 255 characters on separate lines.

Step 1

Next **Cancel**

The screenshot shows the Salesforce Setup interface for creating a new custom field. The page title is "User New Custom Field". The left sidebar lists various setup categories like Details, Fields & Relationships, User Page Layouts, etc. The main form is titled "Step 2. Enter the details". It contains fields for "Field Label" (set to "Verified"), "Default Value" (radio button selected for "Unchecked"), "Field Name" (set to "Verified"), "Description", and "Help Text". At the bottom, there are checkboxes for "Auto add to custom report type" and "Add this field to existing custom report types that contain this entity". The "Next" button at the bottom right is highlighted with a red box.

- After clicking “Next”, Select “Visible” Option and click on “Next” and “Next” and “Save”.

The screenshot shows the Salesforce Setup interface for establishing field-level security. The page title is "User New Custom Field". The left sidebar lists various setup categories. The main form is titled "Step 3. Establish field-level security". It shows a table of profiles and their visibility settings. The "Visible" checkbox for the first profile is highlighted with a red box. The "Next" button at the bottom right is also highlighted with a red box.

Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom - Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom - Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom - Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Custom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Standard	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'User' and lists various setup categories. The main area is titled 'New Custom Field' and is on 'Step 4 of 4'. The field configuration includes:

- Field Label:** Verified
- Data Type:** Checkbox
- Field Name:** Verified
- Description:** (empty)

The 'Add to page layouts' section shows three layouts selected for inclusion:

- Add Field Page Layout
- Community Member Layout
- User Layout

At the bottom right of the main form, there are buttons for 'Previous', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box.

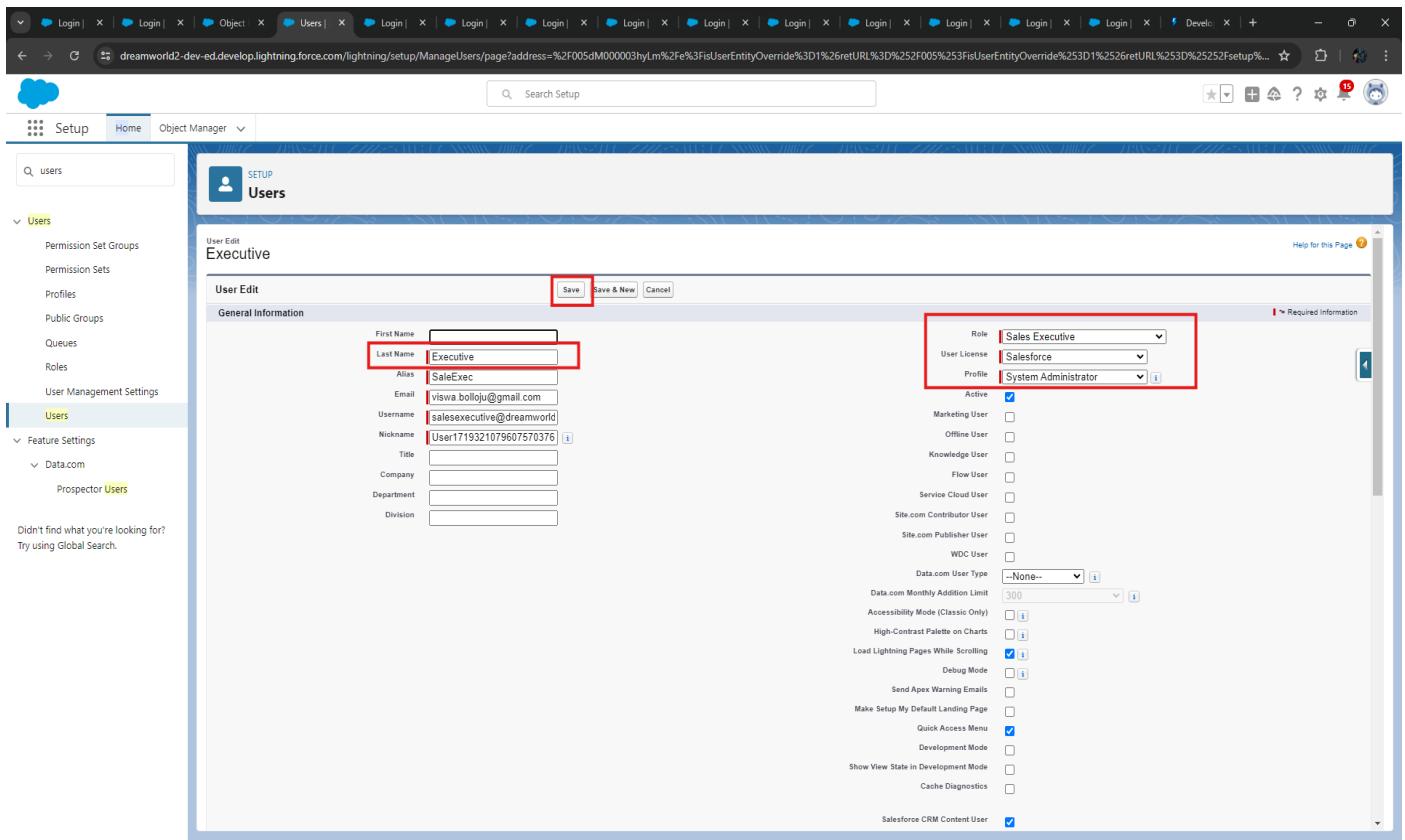
Step 10: Create Users

- Create three different users with three different Roles and profiles as we have mentioned above.
 - **User 1:** -
 1. Go to Setup → Quick Find “Search box” → Users → New User
 2. LastName – **Executive**
 3. Role - **Sales Executive**
 4. License – **Salesforce**
 5. Profile - **System Administrator**
 6. Save
- To create a “User”, click on “New”.

- Fill in the details of “User 1”.

- Click on “Save”.

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- Do the same with **User 2, User 3, User 4**

- **User 2:** -

1. Go to Setup → Quick Find “Search box” → Users → New User
2. LastName - **Manager**
3. Role - **Sales Manager**
4. License - **Salesforce Platform**
5. Profile - **Manager**
6. Save

- **User 3:** -

1. Go to Setup → Quick Find “Search box” → Users → New User
2. LastName - **Customer**
3. Role - **Customer**
4. License - **Salesforce Platform**
5. Profile - **Customer**

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6. Make Sure the verified check box is “Unchecked”.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with various navigation options. The main area displays the 'User Detail' page for a user named 'Customer'. The 'Name' field is highlighted with a red box. At the bottom of the page, there's a section labeled 'Profile' which includes a 'Verified' checkbox. This checkbox is currently unchecked. Other fields shown include 'Email', 'Username', 'Nickname', 'Title', 'Company', 'Department', 'Division', 'Address', 'Time Zone', 'Locale', 'Language', 'Delegated Approver', 'Manager', 'Receive Approval Request Emails', 'Federation ID', 'App Registration: One-Time Password Authenticator', 'App Registration: Salesforce Authenticator', 'Security Key (U2F or WebAuthn)', 'Lightning Login', and 'Temporary Verification Code (Expires in 1 to 24 Hours)'. To the right of the main form, there's a list of user-related settings with checkboxes, many of which are checked.

7. Save

- **User 4: -**

1. Go to Setup → Quick Find “Search box” → Users → New User
2. LastName - **Customer2**
3. Role - **Customer**
4. License - **Salesforce Platform**
5. Profile - **Customer**
6. Make Sure the verified check box is “checked”.

The screenshot shows the Salesforce Setup - Users page. A new user record is being created with the following details:

- Name:** Customer2
- Alias:** cust2
- Email:** viswa.bolloju@gmail.com [Verify]
- Username:** customer2@dreamworld.com
- Nickname:** User17193215137466837465
- Title:**
- Company:**
- Department:**
- Division:**
- Address:**
- Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Delegated Approver:**
- Manager:**
- Receive Approval Request Emails:** Only if I am an approver
- Federation ID:**
- App Registration: One-Time Password Authenticator:**
- App Registration: Salesforce Authenticator:**
- Security Key (2FA or WebAuthn):**
- Lightning Login:**
- Temporary Verification Code (Expires in 1 to 24 Hours):** [Generate] [i]

On the right side, the user's profile is set to "Customer" and "Salesforce Platform". Other settings like Marketing User, Active, and various permissions are also visible. At the bottom, a "Verified" checkbox is checked.

7. Save

- Result after creating the Users

The screenshot shows the Salesforce Setup - All Users page. The newly created user 'Customer2' is listed among other users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Bollop_Viswa	VBol	projectorproperties@dreamworld.com	Sales Representative	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter_Event	Chatter	chatv@0ddm000005ongyuau.paxcnpx@ray@chatter.salesforce.com	Customer	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Customer	customer	customer@dreamworld.com	Customer	<input checked="" type="checkbox"/>	Customer
<input type="checkbox"/>	Customer2	cust2	customer2@dreamworld.com	Customer	<input checked="" type="checkbox"/>	Customer
<input type="checkbox"/>	Executive	SaleExec	salesexecutive@dreamworld.com	Sales Executive	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Manager	SaleMngr	salesmanager@dreamworld.com	Sales Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	User_Integration	Integ	integration@0ddm000005ongyuau.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@0ddm000005ongyuau.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

The user 'Customer2' is highlighted with a red box. The entire list of users is also enclosed in a large red box.

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Step 11: Create an Approval Process for Property Object

- From Setup → Process Automation → Approval Process.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing sections like Data, Mass Transfer Approval Requests, Process Automation, and Approval Processes. The Approval Processes section is selected and highlighted with a red box. The main content area is titled "Approval Processes" and "Property". It contains instructions for creating approval processes, a "Manage Approval Processes For: Property" dropdown menu, and a list of active and inactive approval processes. The "Create New Approval Process" dropdown menu is open, showing options: "Create New Approval Process", "Use Jump Start Wizard", and "Use Standard Setup Wizard". The "Use Standard Setup Wizard" option is highlighted with a red box. The "Active Approval Processes" table has one row for "Property_Approval". The "Inactive Approval Processes" section below it says "No approval processes available".

- Select “Property” and Choose “Use Standard Setup Wizard”.
- Enter Process Name – “Property Approval”.

The screenshot shows the "Approval Process Edit" screen for the "Property Approval" process. The title bar says "Approval Process Edit" and "Property Approval". The top right corner indicates "Step 1 of 6". The main form is titled "Step 1, Enter Name and Description". It has fields for "Process Name" (containing "Property Approval") and "Unique Name" (containing "Property_Approval"). A "Description" field is also present. At the bottom right of the form are "Save", "Next", and "Cancel" buttons. The "Save" button is highlighted with a red box. The left sidebar of the setup page is visible, showing the same navigation structure as the previous screenshot.

- Give 2 criteria →

1) **Location** is not equal to **blank**,

2) **Verified Equals false**.

Approval Process Edit
Property Approval

Step 2. Specify Entry Criteria

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.

Specify Entry Criteria

Use this approval process if the following criteria are met

Field	Operator	Value	Logic
Property_Location	not equal to		AND
Property_Verified	equals	False	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic

Previous Save Next Cancel

- Click **next** and “**Next Automated Approver Determined By**” → Select “**Manager**”.
- From **Record Editability Properties** → Click on **Administrators OR the currently assigned approver can edit records during the approval process**.

Approval Process Edit
Property Approval

Step 3. Specify Approver Field and Record Editability Properties

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked—only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By Manager

Use Approver Field of Property Owner

Administrators OR the currently assigned approver can edit records during the approval process

Record Editability Properties

Administrators OR the currently assigned approver can edit records during the approval process

Previous Save Next Cancel

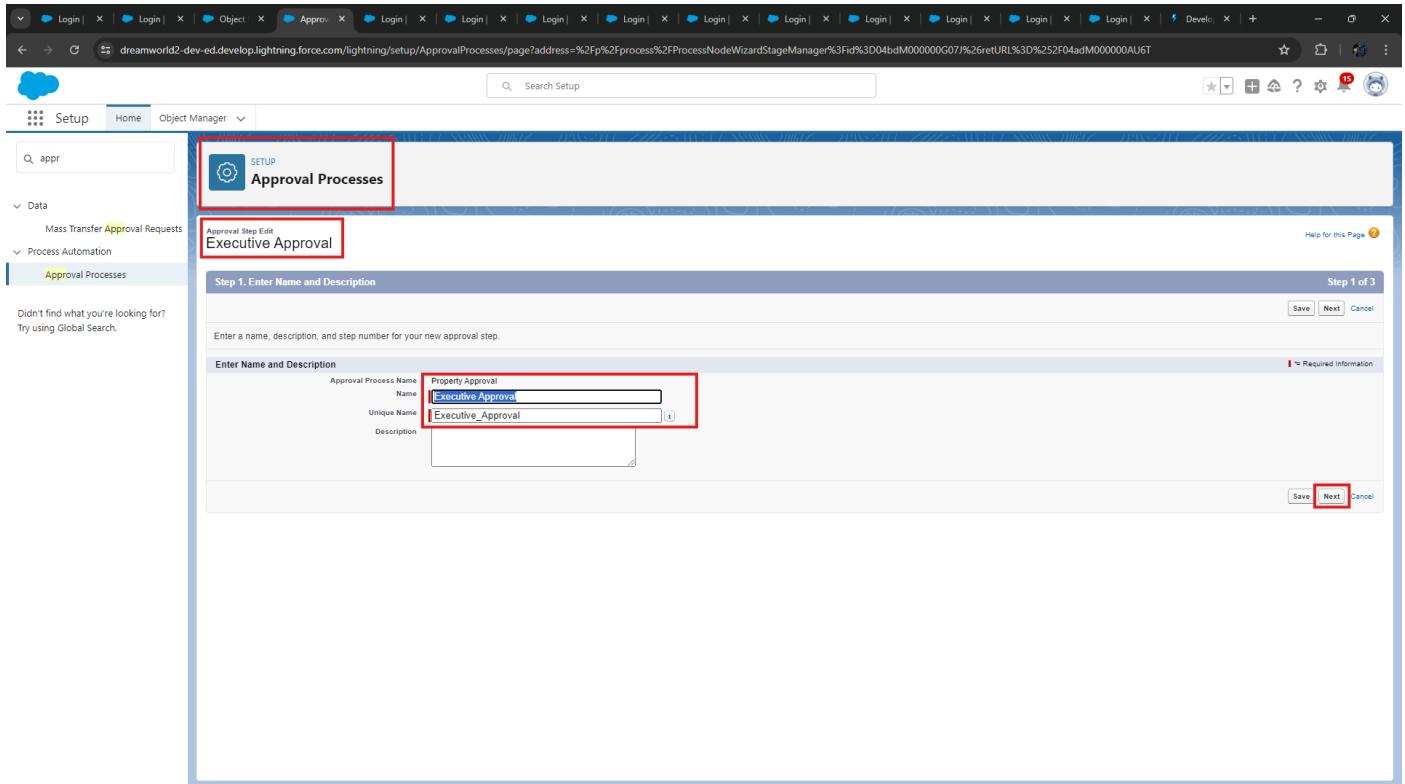
- From Step 5. Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type and click Next.

The screenshot shows the 'Approval Processes' setup page for a process named 'Property Approval'. The current step is 'Step 5. Select Fields to Display on Approval Page Layout'. In the 'Selected Fields' section, four fields are listed: 'Property', 'Owner', 'Location', and 'Type'. The 'Available Fields' section on the left lists 'Created By', 'Last Modified By', 'Property Name', and 'Verified'. Below the 'Selected Fields' section is a preview of the approval page layout. At the bottom right of the page, there are 'Previous', 'Save', and 'Next' buttons, with 'Next' being highlighted by a red box.

- Click Next and Select the **initial Submitters** →
 - 1) Owner → **Property Owner**
 - 2) Roles → **Sales Manager**
- Click on “Save”.

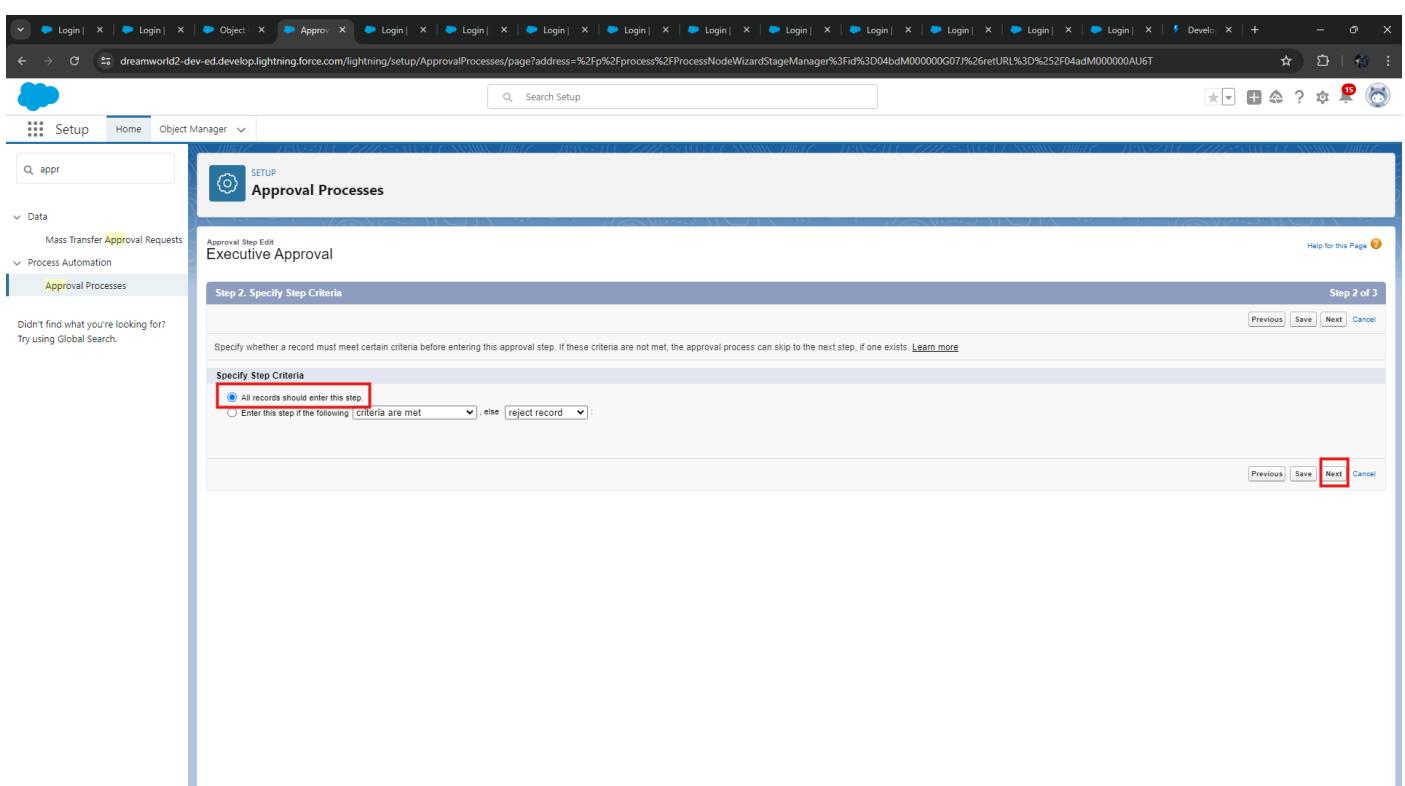
The screenshot shows the 'Approval Processes' setup page for the 'Property Approval' process. The current step is 'Step 6. Specify Initial Submitters'. In the 'Initial Submitters' section, two roles are selected: 'Role: Sales Manager' and 'Property Owner'. The 'Available Submitters' list on the left includes various roles like CEO, CFO, COO, Channel Sales Team, Customer Support, Director, etc. Below the 'Initial Submitters' section is a 'Submission Settings' section with a checkbox for 'Allow submitters to recall approval requests'. At the bottom right of the page, there are 'Previous', 'Save', and 'Cancel' buttons, with 'Save' being highlighted by a red box.

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The screenshot shows the Salesforce Setup interface. In the top left, there's a navigation bar with multiple tabs labeled 'Login'. Below it is a sidebar with sections for 'Data' (Mass Transfer Approval Requests, Process Automation), 'Process Automation' (Approval Processes), and a search bar. The main content area has a title 'Approval Processes' with a sub-section 'Executive Approval'. A specific step is highlighted with a red box. The step details are shown in a form with fields: 'Approval Process Name' (Property Approval), 'Name' (Executive Approval), 'Unique Name' (Executive_Approval), and 'Description'. The 'Name' field is specifically highlighted with a red box. At the bottom right of the step form, there are 'Save', 'Next', and 'Cancel' buttons, with 'Next' being highlighted by a red box.

- Add an approval step name “Executive Approval”.
- Specify the Criteria → All record should enter



The screenshot shows the 'Specify Step Criteria' page for the 'Executive Approval' step. The top navigation bar has a 'Specify Step Criteria' section highlighted with a red box. The main content area shows a section titled 'Specify Step Criteria' with a radio button group. The first option, 'All records should enter this step', is selected and highlighted with a red box. Below it are other options: 'Enter this step if the following criteria are met' and 'reject record'. At the bottom right of the page, there are 'Previous', 'Save', and 'Next' buttons, with 'Next' being highlighted by a red box.

- Click next and select the Approver as “Sales Executive” and “Save”

The screenshot shows the 'Approval Processes' setup page. The user is on Step 3: Select Assigned Approver. The 'Select Approver' section contains three radio button options: 'Let the submitter choose the approver manually', 'Automatically assign using the user field selected earlier (Manager)', and 'Automatically assign to queue'. The third option is selected. Below it is a dropdown menu set to 'User' with a search bar containing 'Executive'. A red box highlights this area. There are also two radio button options under 'When multiple approvers are selected': 'Approve or reject based on the FIRST response' (selected) and 'Require UNANIMOUS approval from all selected approvers'. At the bottom right, there are 'Previous', 'Save' (highlighted with a red box), and 'Cancel' buttons.

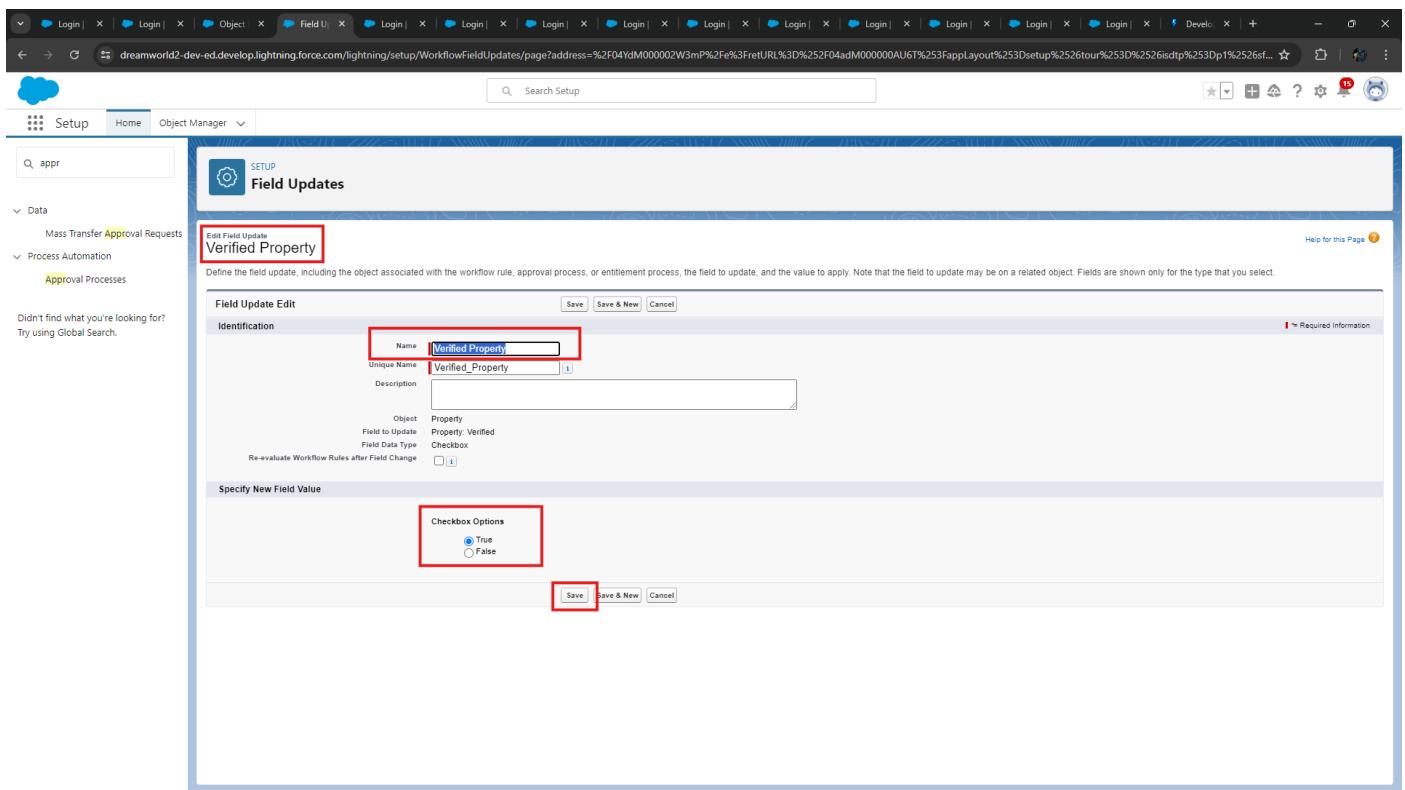
- Click on “Add New” and click on “Field Update”.

The screenshot shows the 'Approval Processes' setup page. In the 'Initial Submission Actions' section, there is a dropdown menu with 'Add Existing' and 'Add New' options. The 'Add New' option is highlighted with a red box. Below it is a 'Task' option with a 'Description' field containing 'Lock the record'. Another option, 'Field Update', is also highlighted with a red box and has a 'Description' field containing 'Unverified Property'. The rest of the page shows sections for 'Approval Steps', 'Final Approval Actions', 'Final Rejection Actions', and 'Recall Actions', each with their own configuration fields.

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- Add One field Update as “**Verified Property**”

- 1) Select Object → **Property**
- 2) Field to Update → **Verified**
- 3) Field Data Type → **CheckBox**
- 4) Select CheckBox Option as “**True**”
- 5) Save.



- Add One field Update as “**UnVerified Property**”

- 1) Select Object → **Property**
- 2) Field to Update → **Verified**
- 3) Field Data Type → **CheckBox**
- 4) Select CheckBox Option as “**False**”
- 5) Save.

The screenshot shows the 'Field Updates' page in the Salesforce Setup. A new field update is being created with the name 'UnVerified Property'. The 'Field to Update' is set to 'Property: Verified' and the 'Field Data Type' is 'Checkbox'. Under 'Specify New Field Value', the 'True' option is selected. The 'Save' button at the bottom is highlighted with a red box.

- Activate the Approval Process and below picture shows the result.

The screenshot shows the 'Approval Processes' page in the Salesforce Setup. An approval process named 'Property Approval' is being configured. Key settings include:

- Entry Criteria:** (Property: Location NOT EQUAL TO null) AND (Property: Verified EQUALS False)
- Initial Submitters:** Role: Sales Manager, Property Owner
- Approval Steps:**
 - Approval Actions:** Action: Record Lock, Description: Verified Property
 - Rejection Actions:** Action: Record Lock, Description: UnVerified Property

 The 'Activate' button is highlighted with a red box. Other fields like 'Next Automated Approver Determined By' and 'Record Editability' are also visible.

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Step 12: Create a Record trigger flow to submit the Approval Process Automatically.

- From Setup → Search for Flows → Click on New and Select “Start From Scratch”.

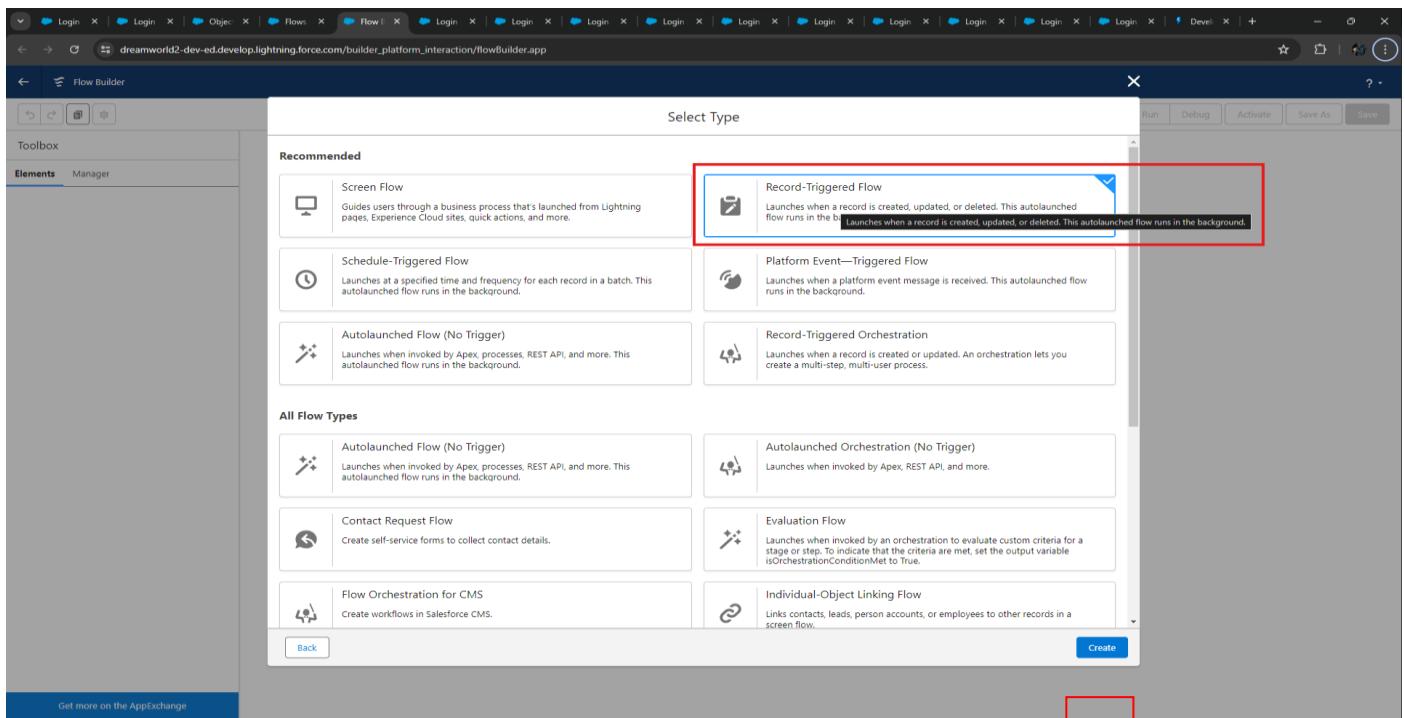
The screenshot shows the Salesforce Setup Flows page. The sidebar on the left has 'Process Automation' expanded, with 'Flows' selected. A red box highlights the 'Flows' category in the sidebar. The main area shows a search bar 'Q Flows' and a 'SETUP Flows' button. Below this is a section titled 'Try the Automation Lightning App!' with a list of features. To the right is a cartoon illustration of a squirrel. At the bottom right of the main area is a 'New Flow' button, which is also highlighted with a red box. The URL in the browser is <https://dreamworld2-dev-ed.lightning.force.com/lightning/setup/Flows/home>.

- Click on next.

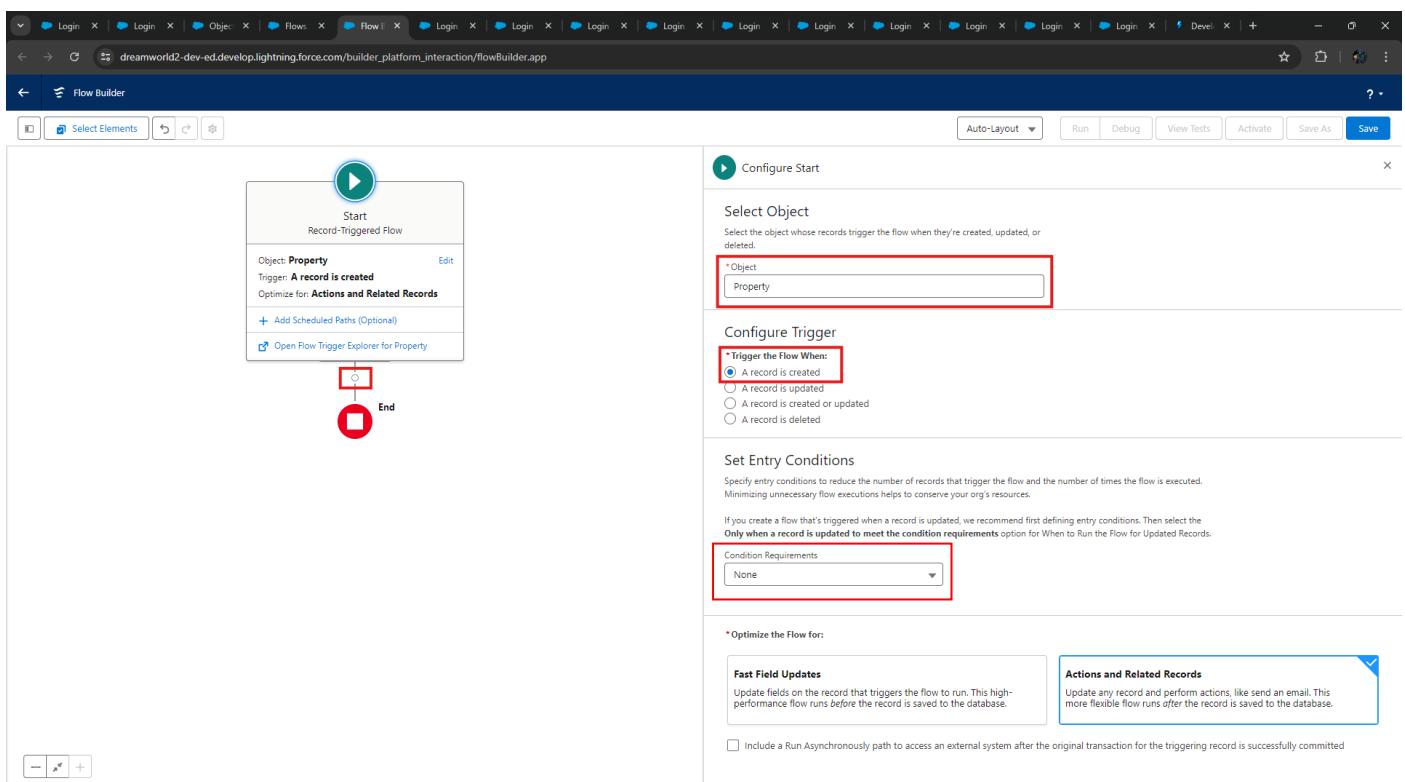
The screenshot shows the Flow Builder 'New Flow' wizard. The top navigation bar includes 'Flow Builder', 'Free-Form', 'Run', 'Debug', 'Activate', 'Save As', and 'Save'. On the left is a 'Toolbox' with 'Elements' selected. The main area is titled 'New Flow' and contains two options: 'Start From Scratch' (highlighted with a red box) and 'Use a Template' (with a search icon). Below these are 'Back' and 'Next' buttons, with the 'Next' button highlighted with a red box. The URL in the browser is https://dreamworld2-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app.

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- Click on “Record-Triggered Flow” and click on “Create”.

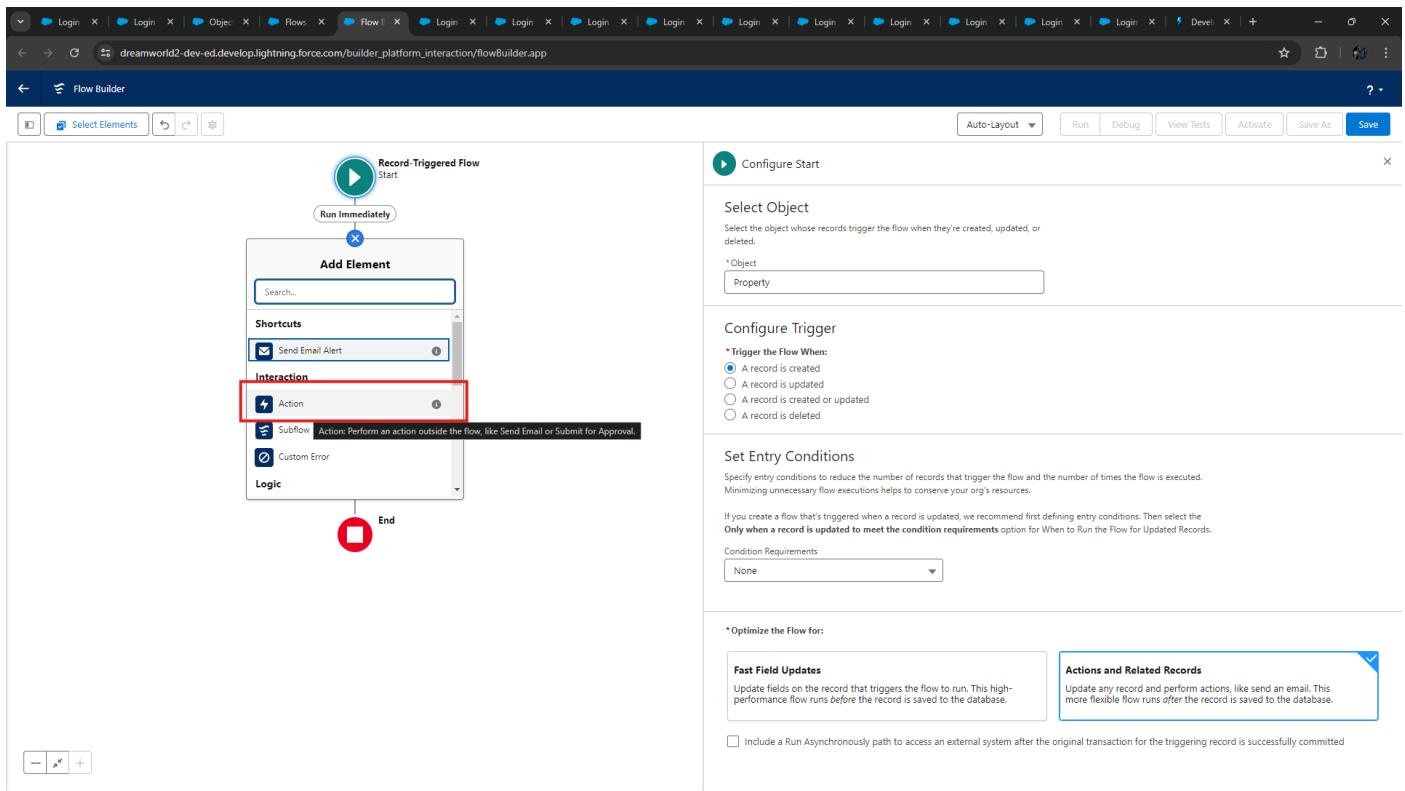


- Select Object → Property
- Select “Trigger the flow when” → “A record is created”
- Set Entry Conditions → “None”

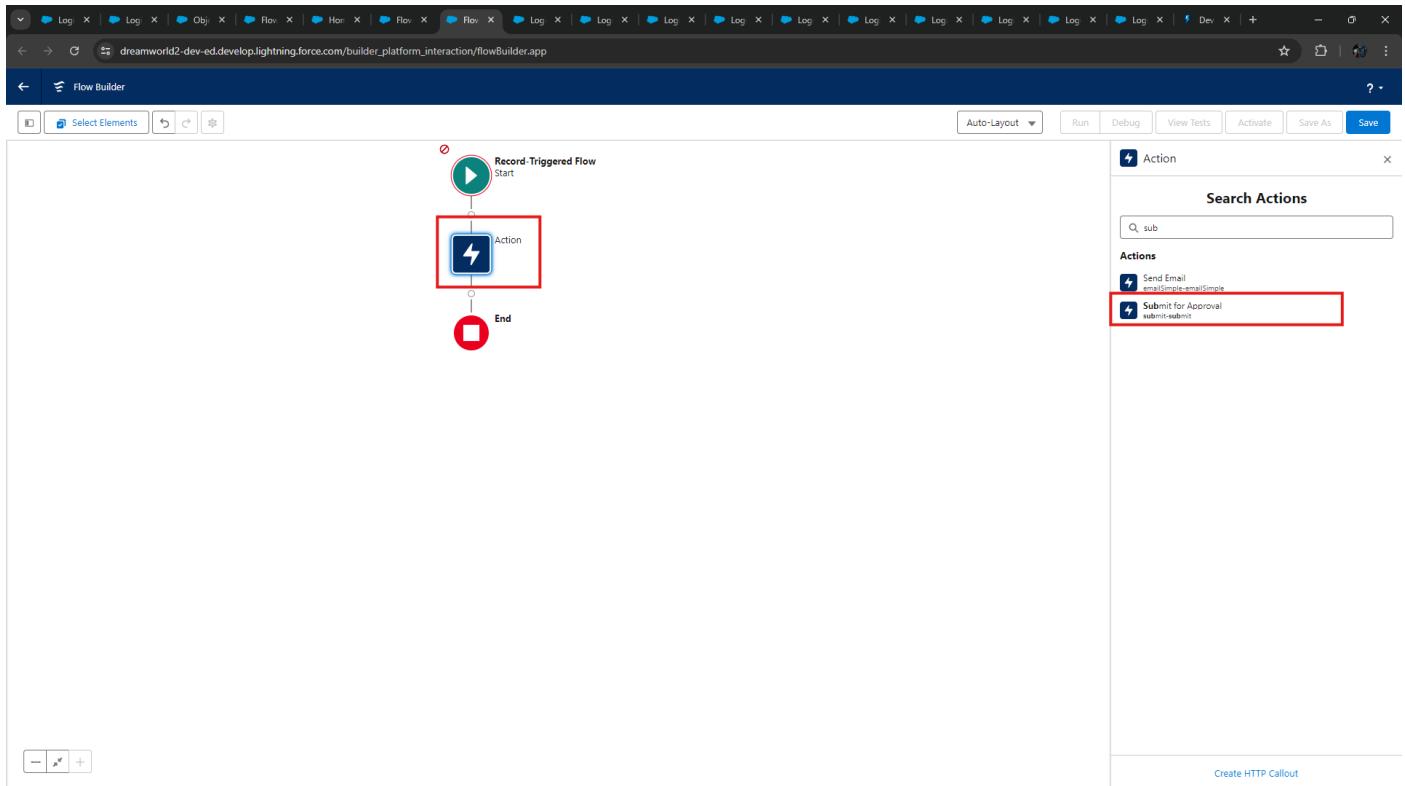


- Click on “Add Element” and add “Action” element.

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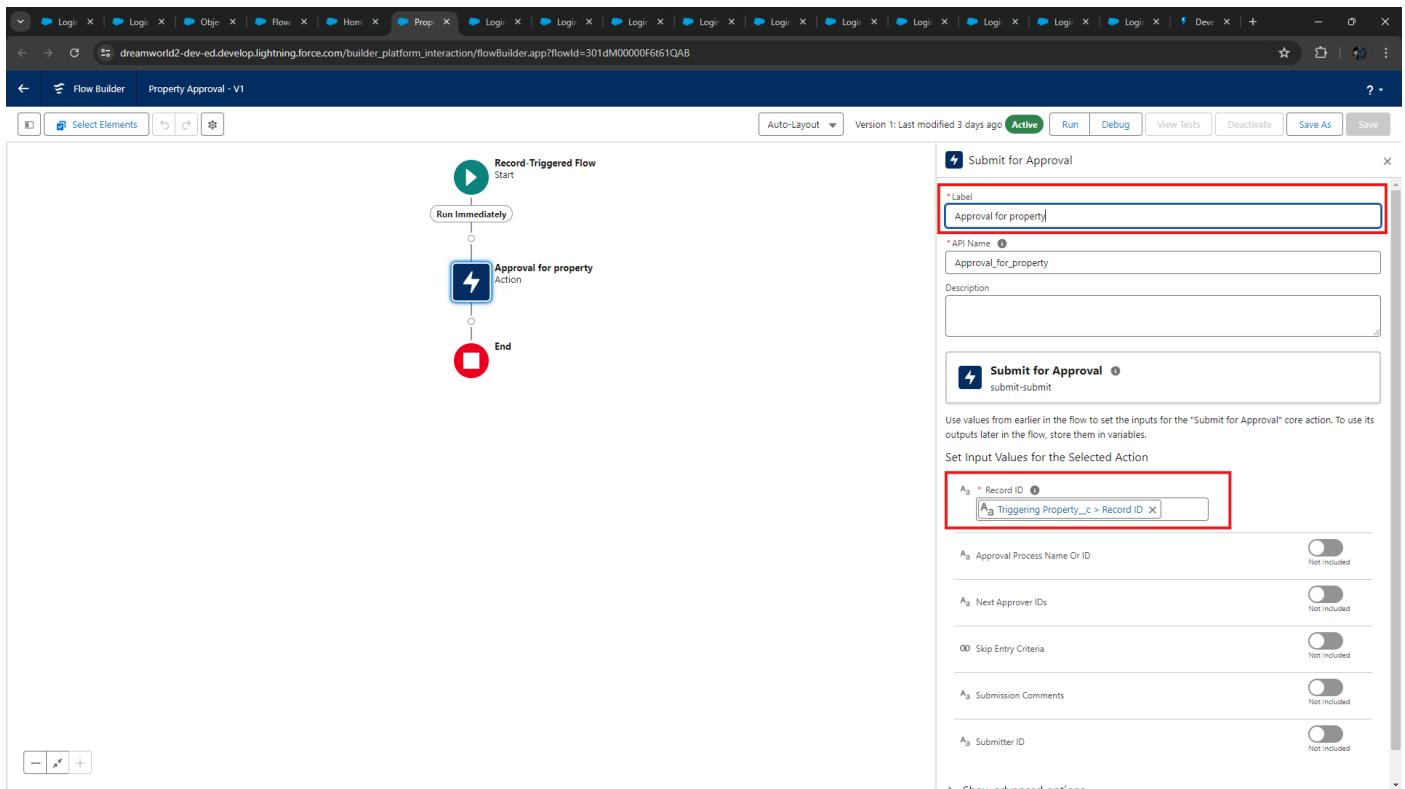


- Search for “Submit for Approval” action and select it.

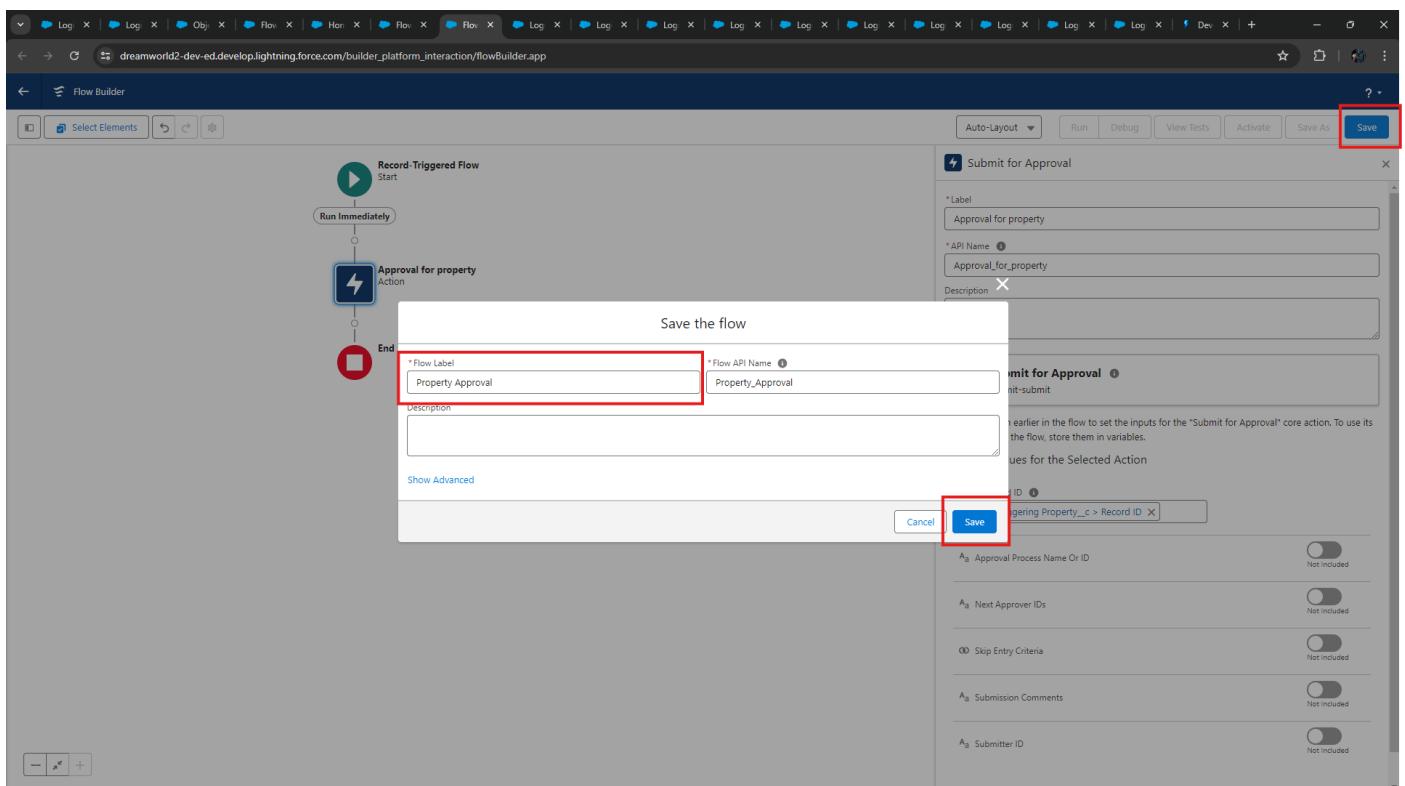


- Give Label Name: “Approval for property”.
- Select Record Id → Triggering Property__c > Record ID.

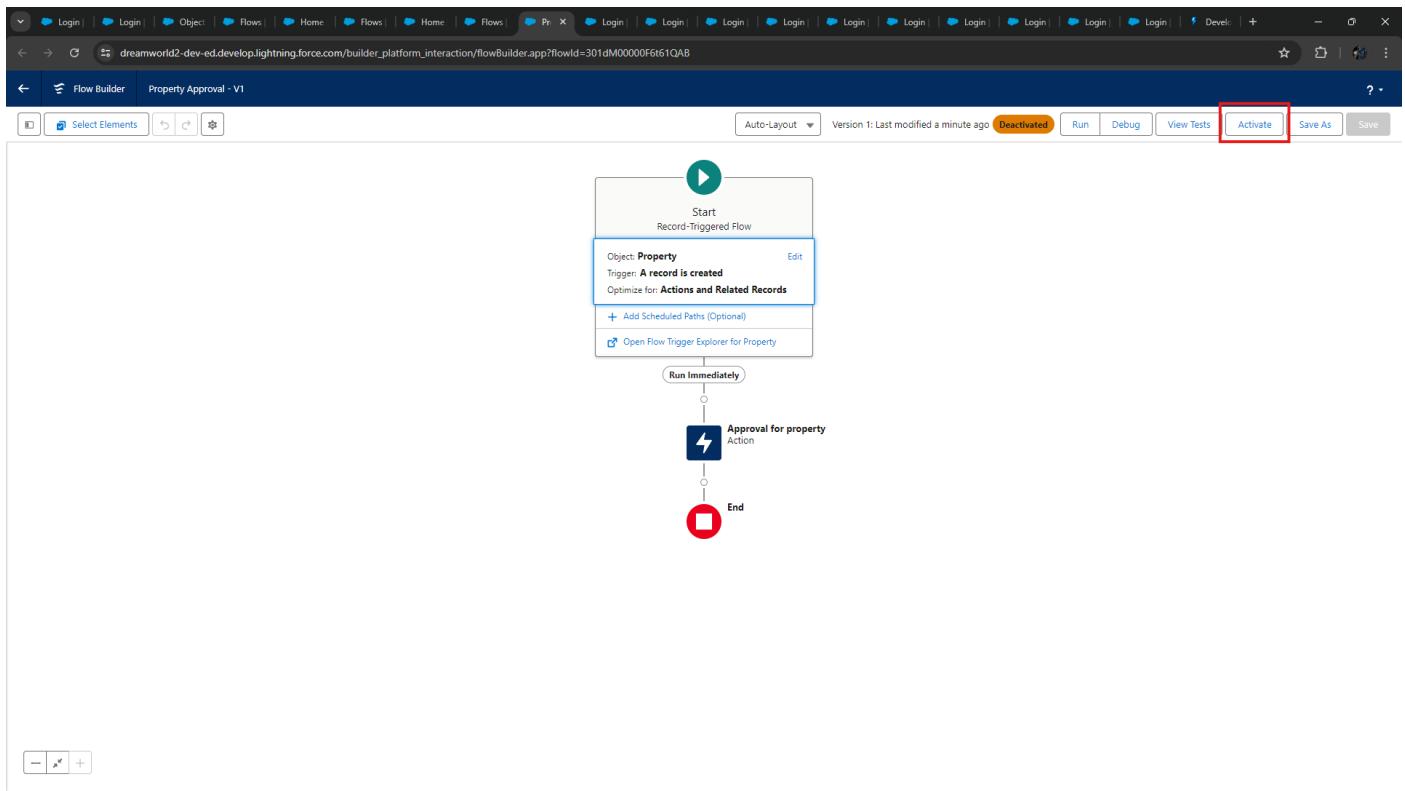
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- Click on “Save”.
- Save the Flow and Give label as → “Property Approval” and “Activate”.



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- After creating the flow, the result is shown in below picture.

Flow Label	Process Type	Active	Template	Package State	Last Modified By	Last Modified Date
Property Approval	Auto-launched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Viswa Bolloju	02/07/2024, 1:41 am
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
CMS: Check Whether Any Step is Completed	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
CMS: Notify Content Author	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
CMS: Review Content	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
CMS: Submit Content for Review	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
CMS: Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Enablement: Send Feedback Ready Notification	Auto-launched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed		
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed		
Create Waitlist	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Enroll or Unenroll Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Outbound New Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Inbound New Guest Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Inbound Cancel Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		

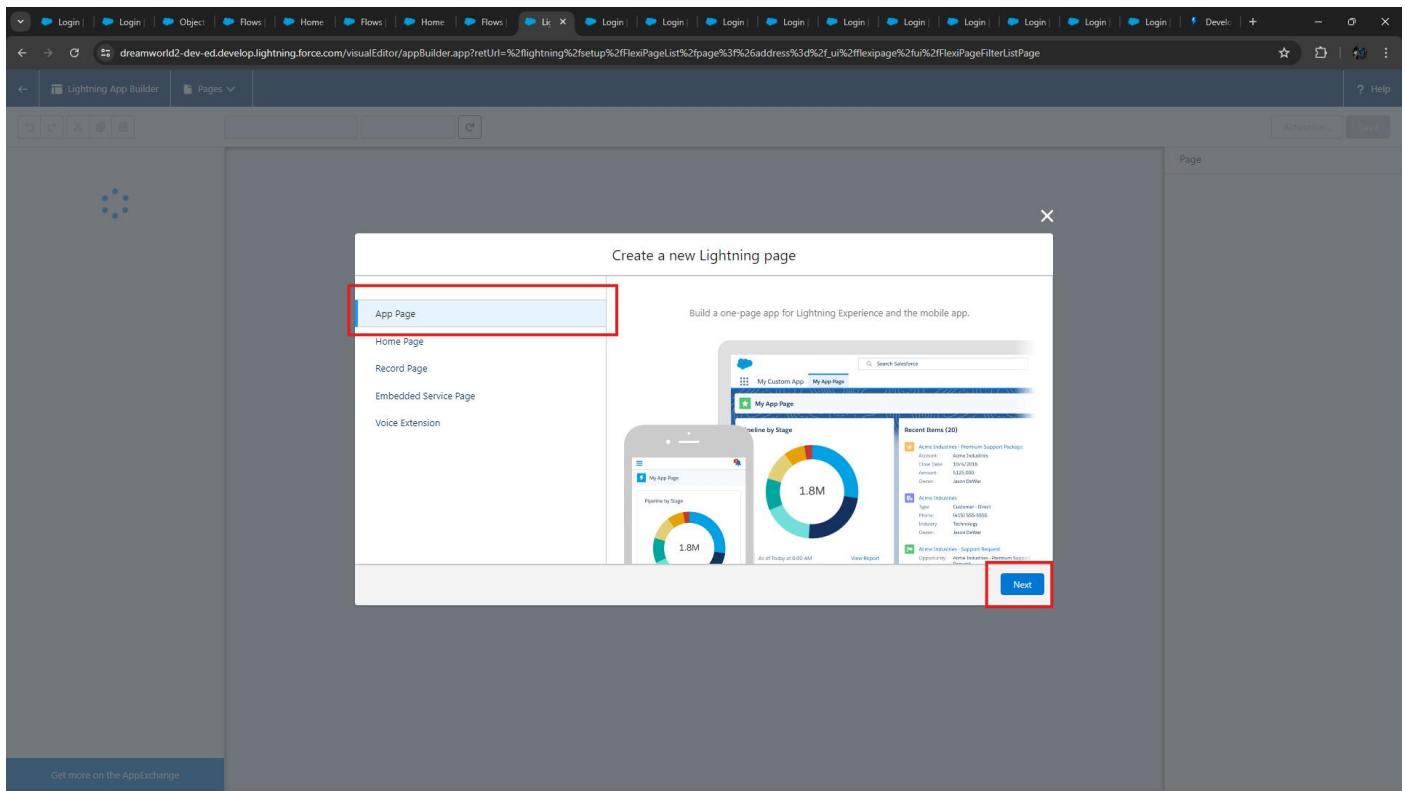
Step 13: Create an App Page

Create an App Page on the Property details Object named as “Search Your Property”.

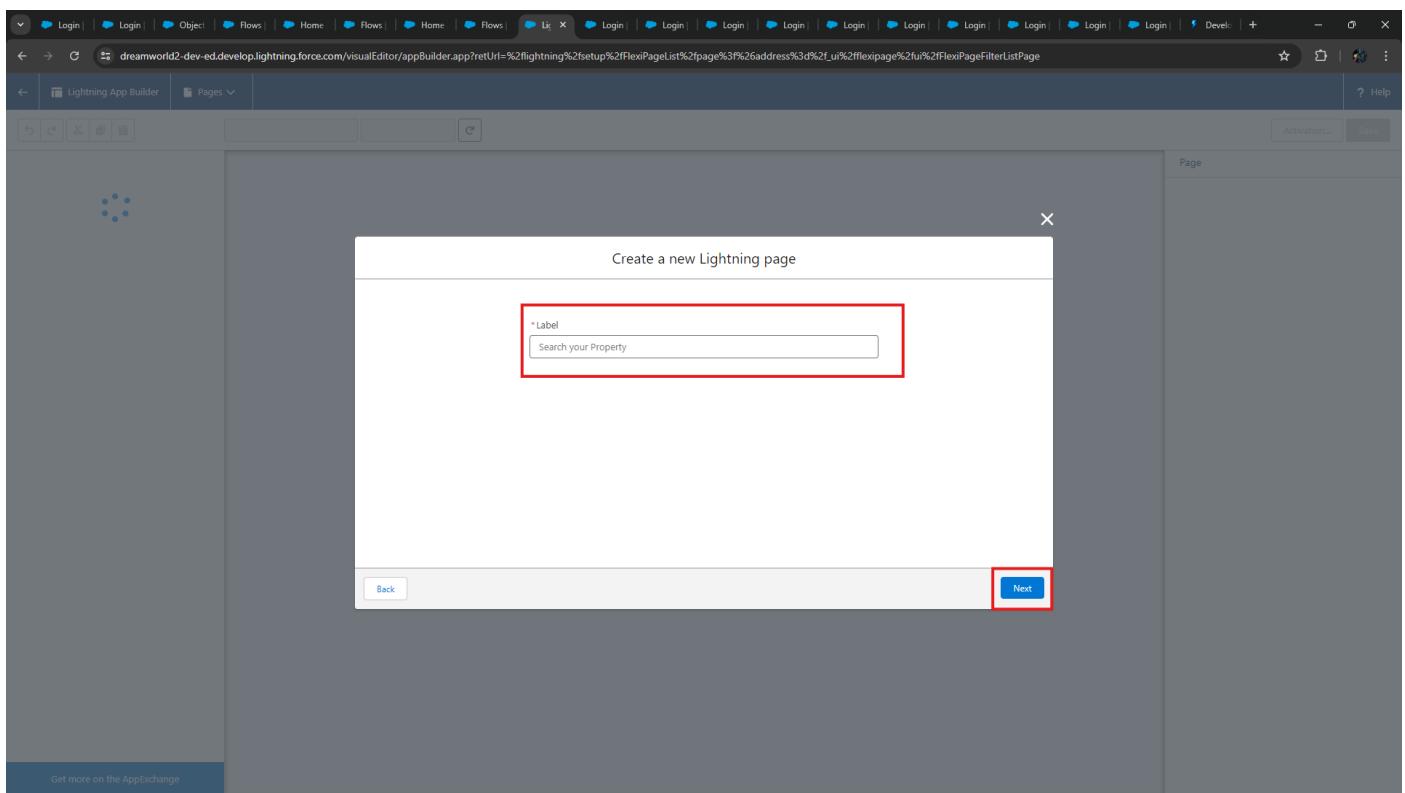
- From Setup → Go to Lightning App Builder → Click on New → Select App Page and Click on Next.

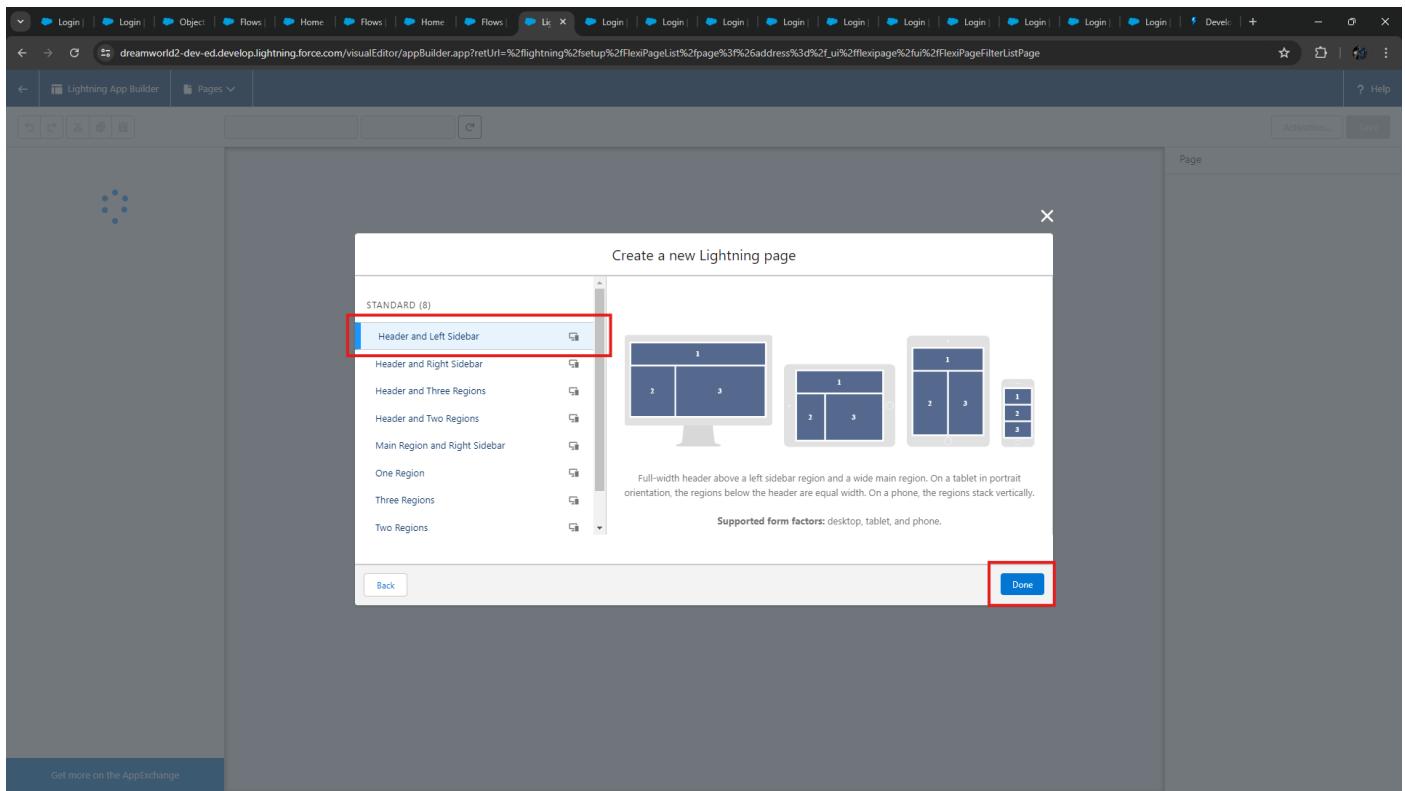
The screenshot shows the Salesforce Setup Home page. A red box highlights the 'Setup' tab in the top navigation bar. Another red box highlights the search bar containing 'App b'. On the left sidebar, under 'User Interface', 'Lightning App Builder' is selected and highlighted with a red box. The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with a table listing six items: 'Property Approval' (Process Definition), 'Unverified Property' (Field Update), 'Verified Property' (Field Update), 'Customer2' (User), 'Customer' (User), and 'Executive' (User). The table has columns for NAME, TYPE, and OBJECT.

The screenshot shows the Lightning App Builder page. A red box highlights the 'Lightning App Builder' tab in the top navigation bar. Another red box highlights the 'New' button in the top right corner of the main table area. The table lists one item: 'Home_Page_Default' (Type: Home Page, Created By: VBall, Last Modified By: VBall). The table has columns for Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. The left sidebar contains a navigation menu with sections like Setup Home, Service Setup Assistant, Commerce Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, Administration, and Platform Tools.



- Give Label as “Search your Property” click “Next”.





- Click “**Header and Left Sidebar**” and Click on “**Done**”.
- After clicking “**Done**” below page appears.

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- Click on “Save” and then click on “Activate”. From Page Setting select page activation as “Activate for all Users”.

Activation: Search your property

PAGE SETTINGS
LIGHTNING EXPERIENCE
MOBILE NAVIGATION

Give this app page a name, set the page visibility, and choose an icon.

Name

Enter a name for your page.

Icon

Choose an icon to represent your app in Lightning Experience and the mobile app.

 Change...

Page Activation

When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup.

Activate for all users
 Activate for system administrators only

To set further restrictions on who sees this page, use permission sets and profile assignments in Setup.

Cancel
Save

- From Lightning Experience Click on “Property Details” and click on “Add Page” and then click on “Save”.

The screenshot shows the Lightning App Builder interface. A modal window titled "Activation: Search your Property" is open. At the top, there are three tabs: "PAGE SETTINGS" (selected), "LIGHTNING EXPERIENCE" (highlighted with a red box), and "MOBILE NAVIGATION". Below the tabs, there's a section for "Page Activation" where the "Activate for all users" option is selected. In the "Property Details" section, the "Property" component is selected. At the bottom of the modal, there are "Cancel" and "Save" buttons, with the "Save" button highlighted with a red box. Outside the modal, in the top right corner of the browser window, there is another "Save" button highlighted with a red box.

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Step 14: Create a LWC Component

Create 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**”

- Create an Apex Class and make it aura enabled and name it “PropertHandler_LWC”.
- Install Salesforce CLI (Command Line Interface) and VS-Code into your Computer.

```
import { lightningElement, api, track, wire } from 'lwc';
import getProperty from "@salesforce/apex/PropertyHandler_LWC.getGetProperty";
import { getRecord } from 'lightning/uiRecordApi';
import USER_ID from '@salesforce/user/Id';

export default class C_01_Property_Management extends LightningElement {
    @api recordId
    userId = USER_ID;
    verifiedVar
    typeVar
    isfalse = true;
    istrue = false;
    @track propertylist = [];
    columns = [
        { label: 'Property Name', fieldName: 'Property_Name__c' },
        { label: 'Property Type', fieldName: 'Type__c' },
        { label: 'Property Location', fieldName: 'Location__c' },
        { label: "Property link", fieldName: "Property_link__c" }
    ]
    propertypoptions = [
        {label: 'Yes', value: 'true'},
        {label: 'No', value: 'false'}
    ]
}
```

- Create a Lightning Web Component in your VS-Code, and (ctrl+shift +P) and click on authorize an org.
- Enter your login id and password to authorize your org.
- After logging into the Salesforce Developer Org. Again press (ctrl+shift +P) and Select “**Create Apex Class**”.

```

1 import { LightningElement, api, track, wire } from 'lwc';
2
3 import { getRecord } from 'lightning/uiRecordApi';
4
5 import USER_ID from '@salesforce/user/Id';
6
7 import default class C_01_Property_Management {
8
9     @api recordId;
10
11     userId = USER_ID;
12
13     verifiedvar;
14
15     typevar;
16
17     isfalse = true;
18
19     istrue = false;
20
21     @track propertylist = [];
22
23     columns = [
24
25         { label: 'Property Name', fieldName: 'Property_Name__c' },
26
27         { label: 'Property Type', fieldName: 'Type__c' },
28
29         { label: 'Property location', fieldName: 'Location__c' },
30
31         { label: 'Property link', fieldName: "Property_link__c" }
32
33     ];
34
35     propertyoptions = [
36
37

```

- Write the Apex Code and Save the class.
- Again press (ctrl+shift +P) and Select “**SFDC: Create Lightning Web Component**”. And name it anything you want, Ex: “propertyDreamWorld”.
- Write the “JavaScript” code, “HTML” code and “XML” code and save the code in your local directory.

```

02:17:25.518 Starting SFDX: Deploy This Source to Org
--- Deployed Source
STATE      FULL NAME          TYPE           PROJECT PATH
Changed    propertyDreamWorld LightningComponentBundle force-app\main\default\lwc\propertyDreamWorld\propertyDreamWorld.html
Changed    propertyDreamWorld LightningComponentBundle force-app\main\default\lwc\propertyDreamWorld\propertyDreamWorld.js
Changed    propertyDreamWorld LightningComponentBundle force-app\main\default\lwc\propertyDreamWorld\propertyDreamWorld.js-meta.xml
02:17:34.418 ended SFDX: Deploy This Source to Org

```

- Right Click on the “**propertyDreamWorld**” file and click on “**SFDC: Deploy this Source to Org**”.

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- Exactly do the same thing to Apex Class: “**PropertyHandler_LWC.cls**”.

The screenshot shows the VS Code interface with the Explorer sidebar open, displaying a project structure for a Lightning Web Component. In the center, the code editor shows the `PropertyHandler_LWC.cls` file. A context menu is open over the code, with the "SFDX: Deploy This Source to Org" option highlighted and enclosed in a red box. The bottom status bar indicates the command was run at 02:17:34.418.

- After deploying it will give you a message that says “**Running SFDC: Deploy this source to Org**”.

The screenshot shows the VS Code interface with the Explorer sidebar open, displaying the project structure. The `PropertyHandler_LWC.cls` file is selected in the classes folder. The bottom status bar shows the command `SFDX: Deploy This Source to Org` was run at 02:17:25.518. A modal window titled “Running SFDC: Deploy This Source to Org” is visible in the bottom right corner, indicating the deployment process is in progress. The status bar also shows the deployment was successful at 02:17:25.518.

- Success message will appear in the VS-Code if the code deploys correctly without errors.

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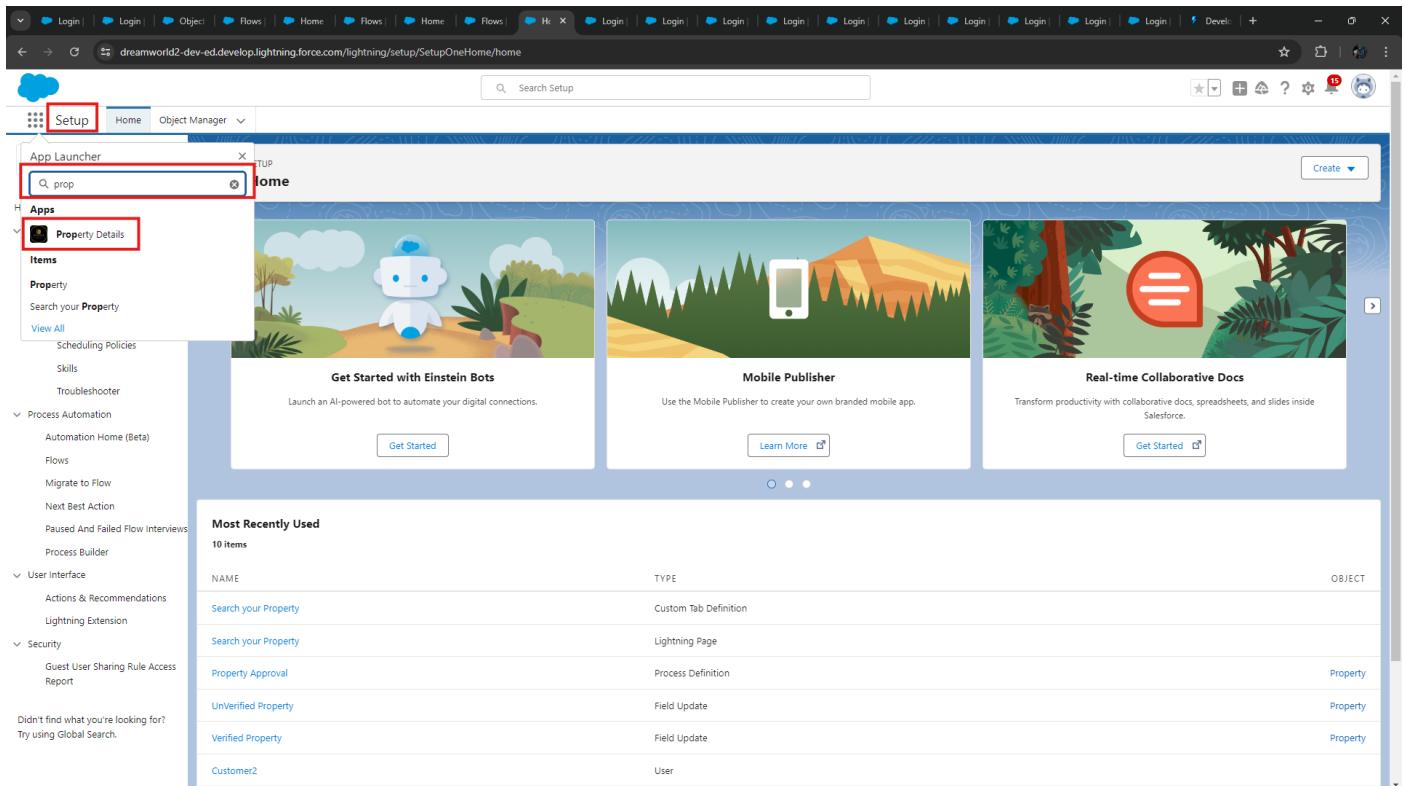
The screenshot shows the VS Code interface with the following details:

- File Explorer:** Shows the project structure with files like `PropertyHandler_LWC.cls`, `propertyDreamWorld.js`, and `propertyDreamWorld.js-meta.xml`.
- Code Editor:** Displays the `propertyDreamWorld.js` file containing JavaScript code for a Lightning Web Component.
- Terminal:** Shows the command `02:17:25.518 Starting SFDX: Deploy This Source to Org` and the output table below.
- Output Panel:** Shows the deployment log: `02:17:34.418 ended SFDX: Deploy This Source to Org`.

STATE	FULL NAME	TYPE	PROJECT PATH
Changed	propertyDreamWorld	LightningComponentBundle	force-app/main/default/lwc\propertyDreamWorld\propertyDreamWorld.html
Changed	propertyDreamWorld	LightningComponentBundle	force-app/main/default/lwc\propertyDreamWorld\propertyDreamWorld.js
Changed	propertyDreamWorld	LightningComponentBundle	force-app/main/default/lwc\propertyDreamWorld\propertyDreamWorld.js-meta.xml

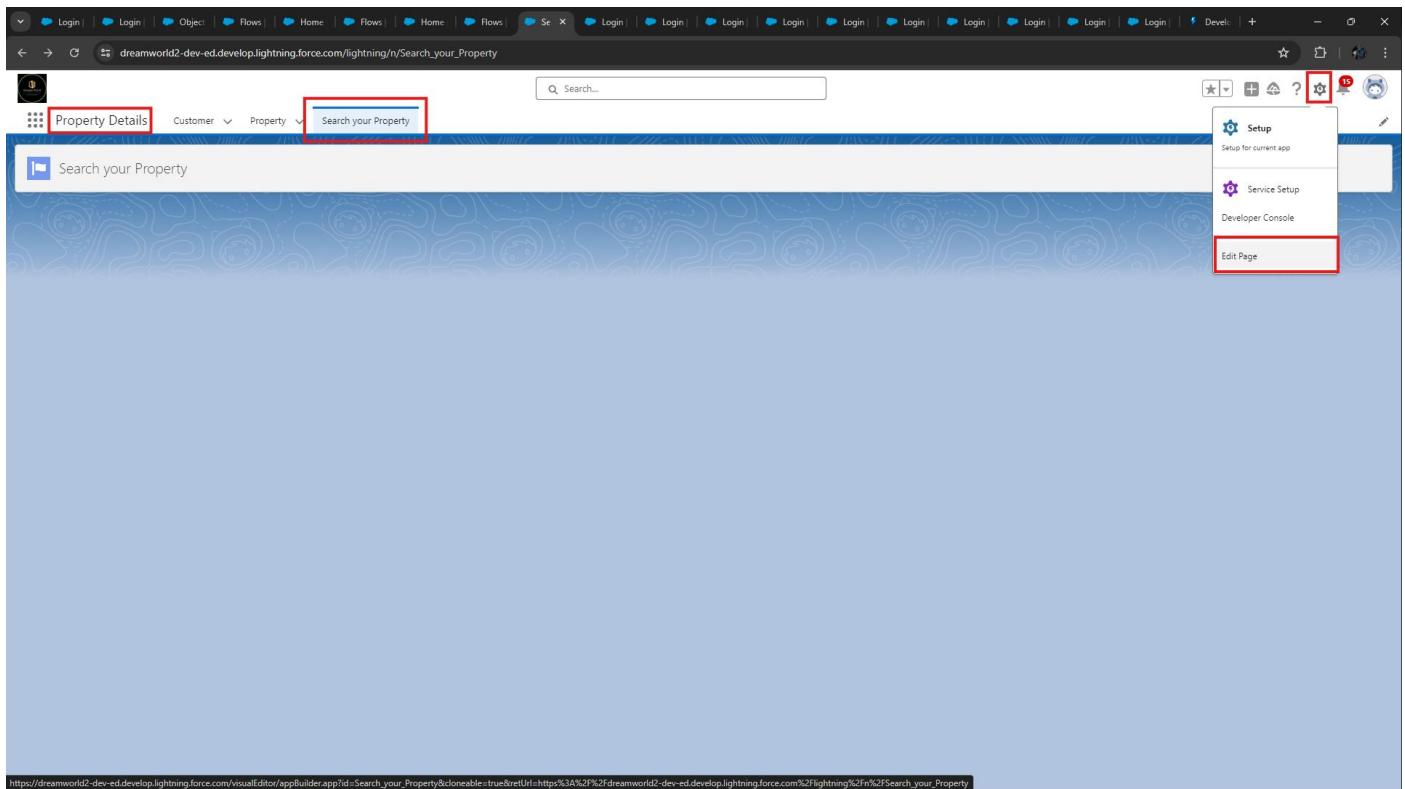
Step 15: Drag Lightning Web Component to your App Page

- From Setup → Go to App Launcher → Search for “Property Details”.

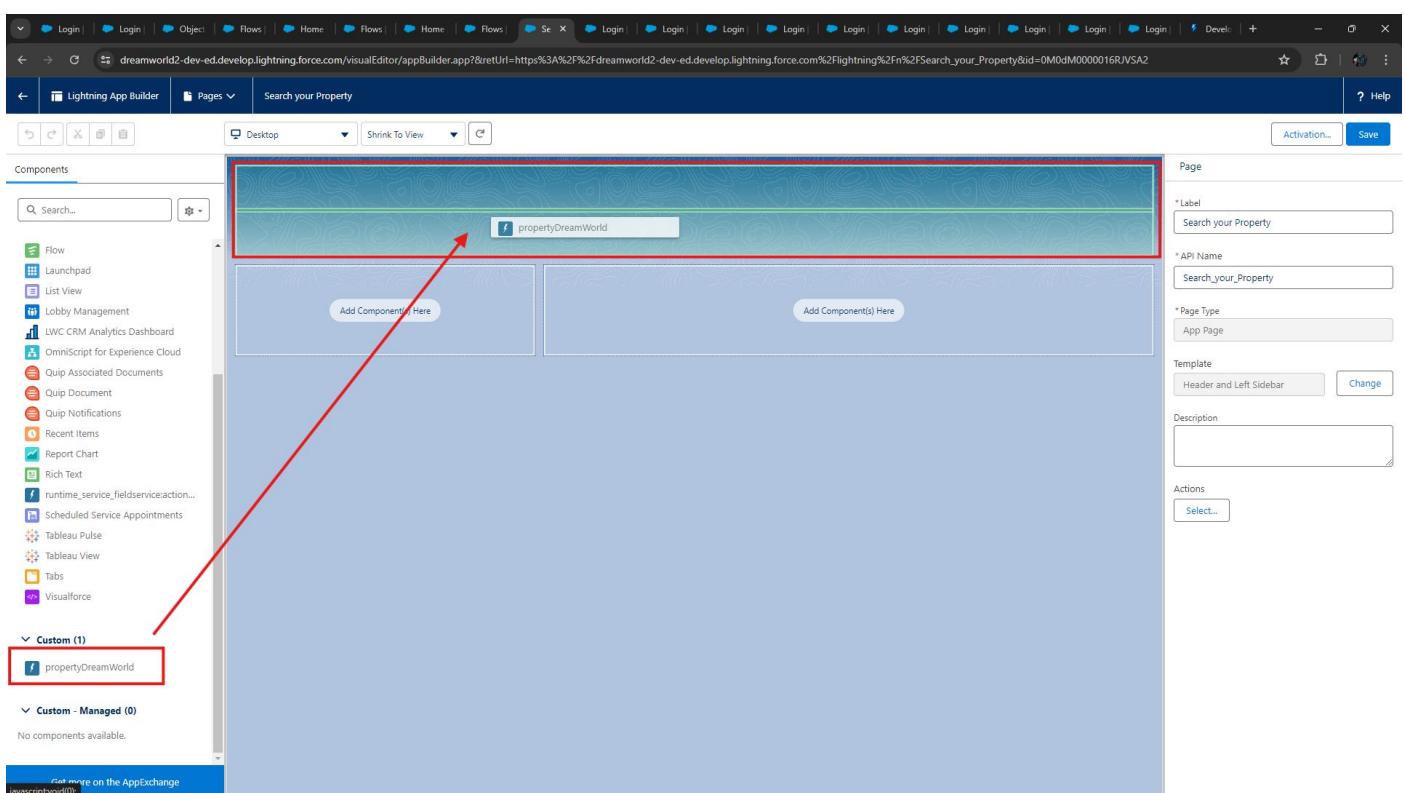


- On this “Search your Property” Page click on gear icon and click on Edit Page.

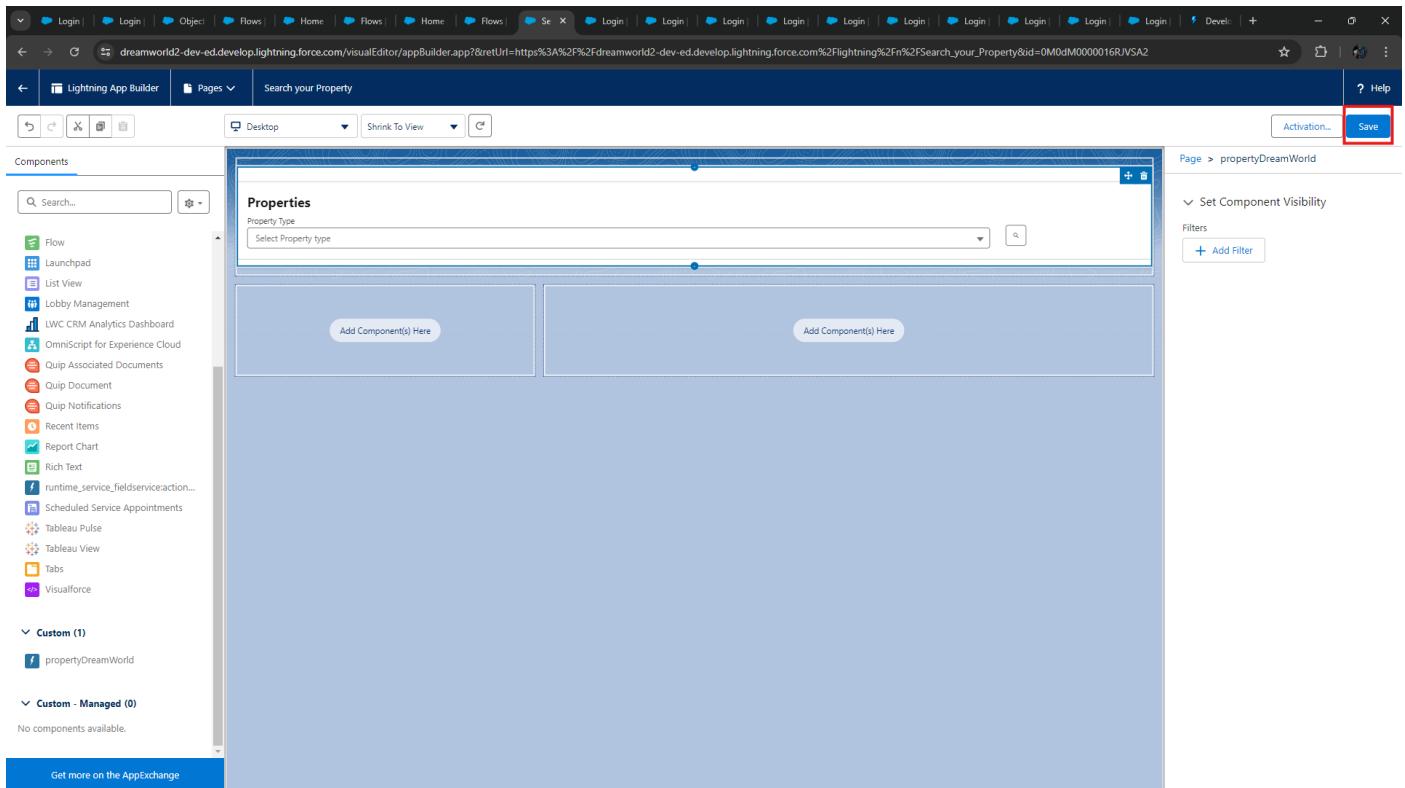
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- Drag the Component to your App Page.

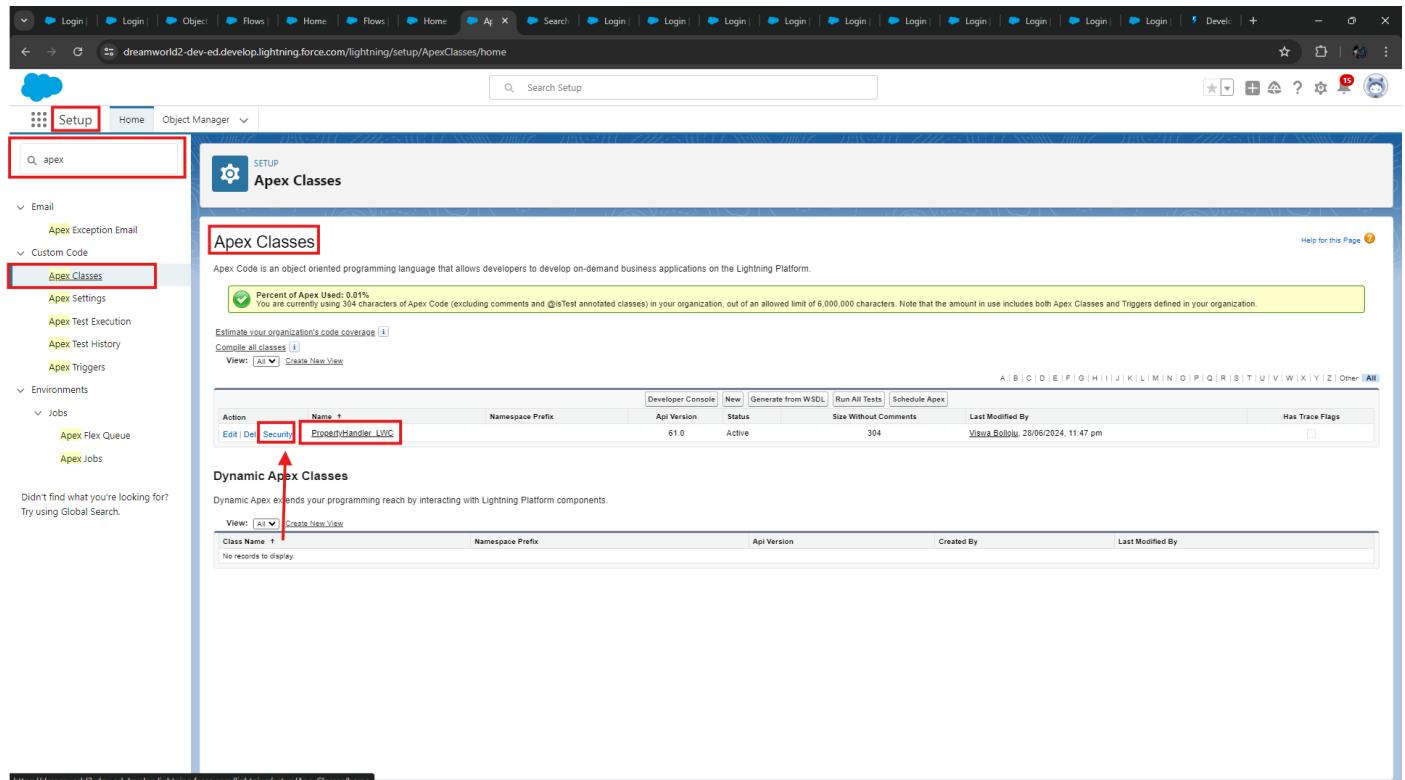


- Save the Page.



Step 16: - Give Access of Apex Classes to Profiles

- From Setup → Search for **Apex Classes** → Click on “Security” behind “**PropertyHandler__LWC**”.



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

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The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** dreamworld2-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fu%2Fprofile%2FApexClassProfilePermissionEdit%2Fe%3Fapex_id%3D01pdM000003xm25%26apex_name%3DPropertyHandler_LWC%...
- Search Bar:** Search Setup
- Left Sidebar:** Includes sections for Email, Custom Code, Environments, and Jobs.
- Main Content Area:** Titled "SETUP Profiles".
 - Section: "Enable Profile Access for Apex Class PropertyHandler_LWC".
 - Buttons: Save (highlighted with a red box) and Cancel.
 - Lists:
 - Available Profiles:** Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website User, B2B Reordering Portal Buyer Profile, Contract Manager, Cross Org Access User, 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, Customer Portal Manager Custom.
 - Enabled Profiles:** Customer Manager (highlighted with a red box).
 - Buttons: Add, Remove.

7. OBSERVATIONS AND FINDINGS: -

Website Integration:

Implementation of Form on the website:

- In the jot form, information captured includes name, phone, email, address, and property interest. This meets the need of capturing essential details.
- This is done by linking the form to Salesforce and then going ahead to map the fields. This will ensure capturing essential details of the Customer which is used by the Company "Dreams World Properties".

Requirements in Setting up Salesforce Configuration:

Setting up the Salesforce Objects and Fields:

- Set up the custom object for customers and property from spreadsheets.
- Set up setup fields for name, contact information, preferences and approval status presumably during the setup of the objects.
- Setting up custom fields and workflows would imply the validation rules and data integrity checks.
- Security settings are configured by creating roles and profiles and controlling access based on approval status.

Approval Process Requirements

Define Criteria and Implement Approval Process:

- Specifically, the approval process for the Property object is defined with criteria and approval steps.
- The field "Verified" gets updated automatically in case of the approved users so that they can directly access curated listings.

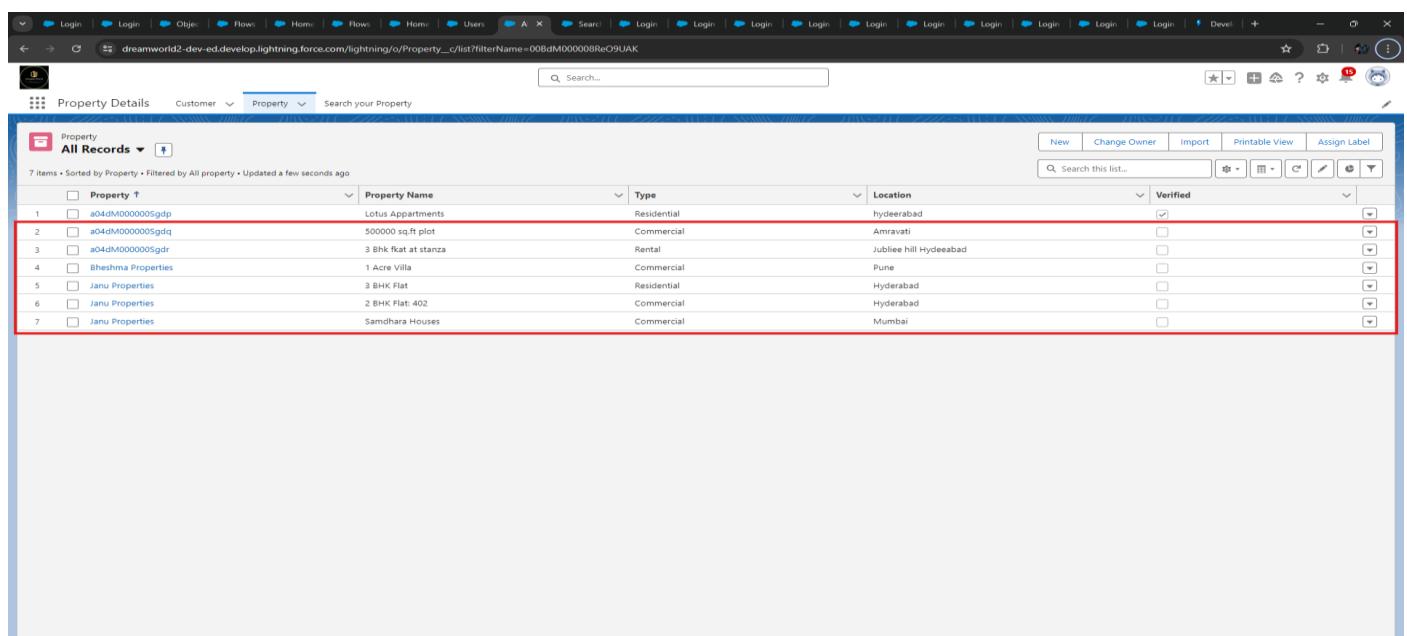
User Experience Requirements

Design User Interfaces:

- I have created a Lightning App called "Property Details" where customer records would be maintained along with their property listings.
- LWC component enables both **verified** and **non-verified** users to see applicable property listings thus enhancing the user experience, Steps do not include anything about training and documentation for internal staff hence not fully addressed.

Integration Testing and Quality Assurance Requirements

- Here in testing part, we have created two Customers users one is “Verified” and Other is “Un-Verified”. This all works by the Apex class running in the background.
- Normally the scope of the Project is to Show the “Verified” Properties to Verified Customers and “Un-Verified” Properties to Un-Verified Customers.
- As per Business, “Verified” Users are premium users and they get to have premium services. We have designed the Application in such way as per business requirements.



Property	All Records	Property Name	Type	Location	Verified
7 items • Sorted by Property • Filtered by All property • Updated a few seconds ago					
1	<input type="checkbox"/> a04JLM000000Sgdp	Lotus Apartments	Residential	hyderabad	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> a04JLM000000Sgdpq	500000 sq.ft plot	Commercial	Amravati	<input type="checkbox"/>
3	<input type="checkbox"/> a04JLM000000Sgdr	3 BHK flat at stanza	Rental	Jubilee hill Hydneabad	<input type="checkbox"/>
4	<input type="checkbox"/> Bheshma Properties	1 Acre Villa	Commercial	Pune	<input type="checkbox"/>
5	<input type="checkbox"/> Janu Properties	3 BHK Flat	Residential	Hyderabad	<input type="checkbox"/>
6	<input type="checkbox"/> Janu Properties	2 BHK Flat: 402	Commercial	Hyderabad	<input type="checkbox"/>
7	<input type="checkbox"/> Janu Properties	Samdhara Houses	Commercial	Mumbai	<input type="checkbox"/>

- In testing, I have logged into Verified user to check whether it is showing “Verified Properties” to Verified Users. The testing was successful, and it is displaying the verified properties to verified Users.

The screenshot shows a Salesforce Lightning page titled 'Search your Property'. At the top, there's a header bar with various icons and a user status message: 'Logged in as Customer2 (customer2@dreamworld.com) Log out as Customer2'. Below the header is a search bar with placeholder text 'Search...'. The main content area has a title 'Properties' and a sub-section 'Property Details'. A dropdown menu for 'Property Type' is set to 'Residential'. A table displays one record: 'Property Name' (Lotus Apartments), 'Property Type' (Residential), 'Property Location' (hyderabad), and 'Property link' (which is empty). The entire row for 'Lotus Apartments' is highlighted with a red border.

- From the Verified User, when I searched for Residential Properties, it showed only verified Properties to verified user.
- The same way logged into Un-verified user, and it is successfully showing Un-verified properties to Un-Verified users.
- As you can see, we have Unverified Properties records in the Property Object. By logging into Unverified user in salesforce, we can see this unverified property as the result when customer searches for different types of properties.

The screenshot shows a Salesforce Lightning page titled 'Property All Records'. The top navigation bar includes 'Customer' and 'Property' dropdowns, and a search bar. The main content area displays a table of property records. The columns are: 'Property Name', 'Type', 'Location', and 'Verified'. The first record is highlighted with a red border. The table shows the following data:

	Property Name	Type	Location	Verified
1	Lotus Apartments	Residential	hyderabad	<input checked="" type="checkbox"/>
2	500000 sq.ft plot	Commercial	Amravati	<input type="checkbox"/>
3	3 BHK flat at stanza	Rental	Jubilee hill Hydeebabad	<input type="checkbox"/>
4	1 Acre Villa	Commercial	Pune	<input type="checkbox"/>
5	3 BHK Flat	Residential	Hyderabad	<input type="checkbox"/>
6	2 BHK Flat: 402	Commercial	Hyderabad	<input type="checkbox"/>
7	Samdhara Houses	Commercial	Mumbai	<input type="checkbox"/>

- From the below picture, I have logged into Un-verified user and searched for Commercial Properties, and it showed all unverified properties to the Un-verified user.

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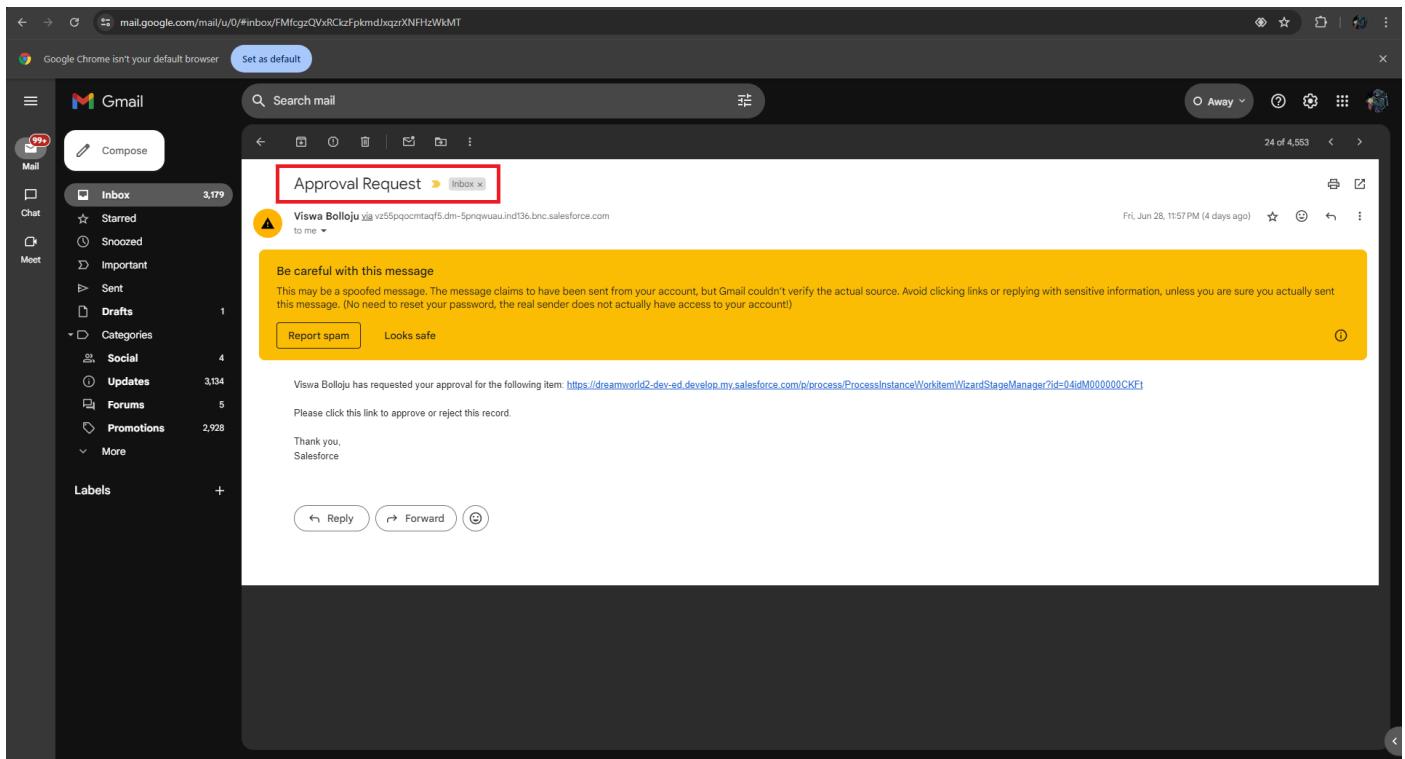
- In conclusion, the application is working perfectly.

Working flow of Property records.

- When we create a record in the property record without “**Verified**” checkbox, automatically the “**Record Trigger Flow**” triggers as per condition. It goes directly to the Approval Process as per conditions.

- After a while, the approval request email received to registered email-id of the Executive user, because executive is the only approver.

Name: BOLLOJU VISWA
E-Mail ID: viswa.bolloju@gmail.com



- Below picture shows the pending records that should be approved by the **executive** user.

Related To	Type	Most Recent Approver	Date Submitted
1 Bheshma Properties	Property	Manager	29/06/2024, 12:21 am
2 Janu Properties	Property	Viswa Bolloju	28/06/2024, 11:52 pm
3 Janu Properties	Property	Viswa Bolloju	28/06/2024, 11:42 pm

- In conclusion, the working of Approval Process with record flow trigger is working properly.

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