

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

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Abstract

Dreams World Properties has carefully integrated Salesforce into its processes, improving customer management and optimising property-related services. This innovative integration streamlines the capture of information about customers directly from the company's website, minimising manual data entry errors and producing detailed customer profiles in Salesforce. Dreams World Properties presents a more specific experience to its let users by breaking them down into approved and non-approved categories, recommending properties based on their unique tastes and requirements. At the same time, non-approved users are not left behind, since they can still view a wide range of property listings that meet general suitability requirements.

This seamless Salesforce integration not only optimizes operational efficiency by automating repetitive processes but also liberates the company's workforce from manual tasks, allowing staff to focus on more strategic objectives. As a result, customer satisfaction has improved, and the business has positioned itself for growth in the highly competitive real estate market. By leveraging Salesforce technology, Dreams World Properties has significantly elevated its ability to deliver superior customer service, provide tailored property recommendations, and streamline internal workflows for enhanced operational performance. The integration demonstrates the company's commitment to utilizing cutting-edge technology to maintain its leadership in the industry, establishing a strong foundation for future success.

Introduction

Dreams World Properties has harnessed the power of Salesforce to revolutionise its client management and property-related services. By integrating Salesforce with its website, the company has automated the capture and organization of customer information and preferences, creating detailed profiles without the need for manual data entry. This system categorises users into approved and non-approved segments, allowing for personalized property recommendations that enhance the user experience for approved clients while still providing a broad range of listings for others.

This integration not only optimises operational efficiency but also frees up staff to focus on strategic tasks, ultimately improving customer satisfaction and driving growth in the competitive real estate market. In an era where personalized customer service and efficient data management are crucial, Dreams World Properties' innovative approach sets it apart from competitors. The automation facilitated by Salesforce ensures that no customer detail is overlooked, and every interaction is recorded and utilized to enhance service delivery.

Approved users receive tailored property suggestions, making their search more efficient and enjoyable, while non-approved users have access to comprehensive listings, ensuring no potential client is left out. This seamless integration showcases Dreams World Properties' commitment to leveraging advanced technology to provide top-tier real estate services, demonstrating their leadership and forward-thinking in an ever-evolving industry. Through this innovative use of Salesforce, Dreams World Properties underscores its dedication to superior customer service, operational excellence, and effective management, solidifying its position as a frontrunner in the real estate market.

SL NO.	TASK
1.	Create a Jotform and integrate it with the org to create a record of customers automatically.
2.	Create Objects from Spreadsheet.
3.	Integrate Jotform with Salesforce Platform
4.	Create Roles
5.	Create a Property Details App
6.	Create Profiles
7.	Create a CheckBox field on user
8.	Create Users
9.	Create an Approval Process for Property Object
10.	Create a Record trigger flow to submit the Approval Process Automatically.
11.	Create an App Page
12.	Create a LWC Component
13.	Drag this Component to your App Page
14.	Give Access of Apex Classes to Profiles

Task 1: Create a Jotform and integrate it with the org to create a record of customers automatically.

Objective: Create a form to capture customer details automatically and create a record in Salesforce.

- **Activity:**

- Develop a JotForm to capture details such as Name, Phone, Email, Address, and the type of property the customer is interested in.

MyForm: <https://form.jotform.com/242782679233466>

The screenshot shows a JotForm builder interface with three tabs at the top: BUILD (selected), SETTINGS, and PUBLISH. The main area is titled "Form". The form fields include:

- Name ***: Two input fields for First Name and Last Name.
- Email**: Input field containing example@example.com.
- Phone Number ***: Input field containing (000) 000-0000, with a validation message below: "Please enter a valid phone number."
- Which type of property are you looking for?**: Radio buttons for RESIDENTIAL, COMMERTIAL, and RENTAL.
- Budget Amount ***: Input field containing e.g., 23.
- Address**: Input fields for Street Address, Street Address Line 2, City, State / Province, and Postal / Zip Code.
- Submit**: A green button at the bottom right.

Task 2: Create Objects from Spreadsheet

Objective: Directly create objects in Salesforce from a spreadsheet.

- **Activity:**

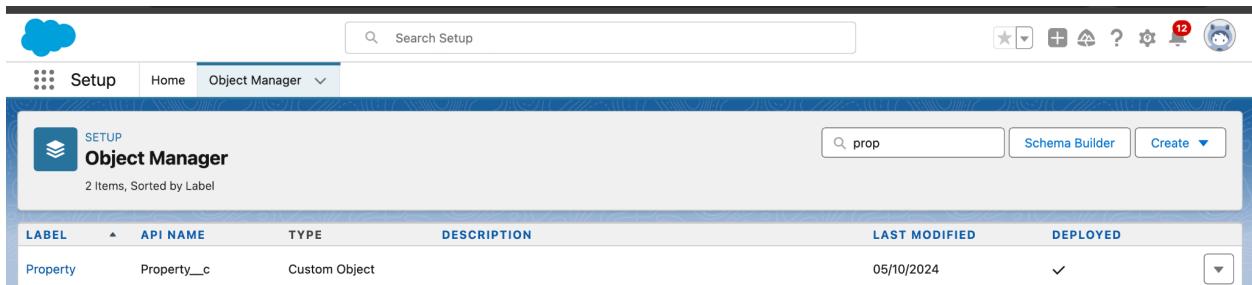
- Create a Customer object.



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains "Customer". The main table displays one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer_c__c	Custom Object		06/10/2024	✓

- Create a Property object.



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains "prop". The main table displays one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Property	Property__c	Custom Object		05/10/2024	✓

Task 3: Integrate JotForm with Salesforce

Objective: Integrate JotForm with Salesforce to create customer records automatically.

- **Activity:**

- a. Integrate JotForm with Salesforce to automate customer record creation.

The screenshot shows the JotForm interface with the "SALESFORCE" integration selected. On the left, there's a sidebar with various settings like Form Settings, Emails, Conditions, Thank You Page, Integrations (which is currently selected), Approval Flows, JotForm Sign, and Mobile Notifications. The main area is titled "SALESFORCE" and shows a "Customer" object selected. Below it, under "Create a record", there's a table mapping form fields to Salesforce fields. The mappings are as follows:

Object Fields	Dream World
Name	Name - First Name
Phone Number	Phone Number
Budget Amount	Budget Amount
Email	Email
Property Type	Which type of property are you looking... (radio button)
City	Address - City
State	Address - State
Street Address	Address - Street Address
Street Address line 2	Address - Street Address 2

The screenshot shows the JotForm interface after the integration has been configured. The "SALESFORCE" section now displays a single action: "Create or update a record Customer". There are buttons for "See Action Logs" and "+ Add New Action". The sidebar on the left remains the same as in the previous screenshot.

Task 4: Create Roles

Objective: Create roles as per the business requirements.

- **Activity:**

- a. Establish a hierarchical role structure where Sales Managers report to Sales Executives.
- b. Establish a hierarchical role structure where Customer report to Sales Managers.

The screenshot shows the Salesforce Role Management interface. On the left, there's a sidebar with navigation links: Data Classification, Build, Deploy, and Monitor. The main area displays a hierarchical tree of roles under 'VP, Director, Sales'. The tree structure is as follows:

- VP, Director, Sales**:
 - Add Role
 - VP, International Sales**:
 - Add Role
 - VP, Marketing**:
 - Add Role
 - Marketing Team**:
 - Add Role
 - VP, North American Sales**:
 - Add Role
 - Director, Channel Sales**:
 - Add Role
 - Channel Sales Team**:
 - Add Role
 - Director, Direct Sales**:
 - Add Role
 - Eastern Sales Team**:
 - Add Role
 - Western Sales Team**:
 - Add Role
 - Sales Representative**:
 - Add Role
 - Sales Executive**:
 - Add Role
 - Sales Manager**:
 - Add Role
 - Customer**:
 - Add Role

Task 5: Create a Property Details App

Objective: Create an app to display the created objects.

- **Activity:**

- a. Create a new Lightning App named "Property Details" and add Customer and Property objects.

The screenshot shows two screenshots of the Salesforce interface. The top screenshot is the 'Lightning Experience App Manager' under 'Setup'. It displays a list of apps with one entry: 'Property Details' by 'Property_Details'. The bottom screenshot is the 'App Builder' for the 'Property Details' app. The left sidebar shows 'App Settings' with 'App Details & Branding' selected. The main area shows 'App Details' with 'App Name' set to 'Property Details' and 'Developer Name' set to 'Property_Details'. It also shows 'App Branding' with an image placeholder and a primary color hex value of '#DFE6F2'. A preview of the app launcher is shown at the bottom.

Lightning App Builder | App Settings | Pages | Property Details | ? Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Options

Navigation and Form Factor

- Navigation Style
 - Standard navigation (selected)
 - Console navigation
- Supported Form Factors**
 - Desktop and phone (selected)
 - Desktop
 - Phone

Setup and Personalization

Setup Experience

- Setup (full set of Setup options) (selected)
- Service Setup

App Personalization Settings

- Disable end user personalization of nav items in this app
- Disable temporary tabs for items outside of this app
- Use Omni-Channel sidebar

Lightning App Builder | App Settings | Pages | Property Details | ? Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Type to filter list...

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods
- Assets

Selected Items

- Property
- Search your Property
- Customer

Task 6: Create Profiles

Objective: Set up profiles as per the business requirements.

- **Activity:**

- Customer Profile:** Clone the Salesforce Platform User profile, name it "Customer," and adjust custom app settings to include only Property Details.

The screenshot shows the Salesforce Profile page for a user named 'Customer'. The profile details are as follows:

- Name:** Customer
- User License:** Salesforce Platform
- Description:** Created by Harshvardhan Singh Chauhan, 05/10/2024, 3:35 pm
- Modified By:** Harshvardhan Singh Chauhan, 05/10/2024, 8:40 pm

Page Layouts:

Standard Object Layouts	Lead
Global [View Assignment]	Lead Layout [View Assignment]
Email Application [View Assignment]	Object Milestone Layout [View Assignment]
Home Page Layout [View Assignment]	Operating Hours Layout [View Assignment]
Account Account Layout [View Assignment]	Order Order Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]	Order Product Order Product Layout [View Assignment]
Appointment Invitation Appointment Invitation Layout [View Assignment]	Payment Payment Layout [View Assignment]
Asset Asset Layout [View Assignment]	Payment Authorization Payment Authorization Layout [View Assignment]

Custom Object Permissions:

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

Platform Event Permissions:

Event	Basic Access	Data Administration
AppLogs	Read, Create, Edit, Delete, View All, Modify All	Customer
Books	Read, Create, Edit, Delete, View All, Modify All	FlowPersonalConfigurations
Book Line Items	Read, Create, Edit, Delete, View All, Modify All	FlowTableViewDefinitions
Book Orders	Read, Create, Edit, Delete, View All, Modify All	Properties
Customers	Read, Create, Edit, Delete, View All, Modify All	Property

- b. **Manager Profile:** Clone the Salesforce Platform User profile, name it "Manager," and enable permissions to modify both Property and Customer records.

Profile Manager

Profile Detail

Name	Manager	Custom Profile
User License	Salesforce Platform	✓
Description		
Created By	Harshvardhan Singh Chauhan, 05/10/2024, 3:40 pm	Modified By Harshvardhan Singh Chauhan, 05/10/2024, 8:42 pm

Page Layouts

Standard Object Layouts	Global	Lead
Global Layout [View Assignment]		Lead Layout [View Assignment]
Email Application Not Assigned [View Assignment]		Object Milestone Object Milestone Layout [View Assignment]
Home Page Layout Home Page Default [View Assignment]		Operating Hours Operating Hours Layout [View Assignment]
Account Account Layout [View Assignment]		Order Order Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]		Order Product Order Product Layout [View Assignment]
Appointment Invitation Appointment Invitation Layout [View Assignment]		Payment Payment Layout [View Assignment]
Asset Asset Layout [View Assignment]		Payment Authorization Payment Authorization Layout [View Assignment]
Asset Layout [View Assignment]		Payment Authorization Layout [View Assignment]

Standard Object Permissions

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	Contact Point Phones	<input type="checkbox"/>									
Addresses	<input type="checkbox"/>	Contact Point Type Consents	<input type="checkbox"/>									
Assets	<input type="checkbox"/>	Customers	<input type="checkbox"/>									
Authorization Forms	<input type="checkbox"/>	D&B Companies	<input type="checkbox"/>									
Authorization Form Consents	<input type="checkbox"/>	Data Use Legal Bases	<input type="checkbox"/>									
Authorization Form Data Uses	<input type="checkbox"/>	Data Use Purposes	<input type="checkbox"/>									
Authorization Form Texts	<input type="checkbox"/>	Documents	<input type="checkbox"/>									
Background Operations	<input type="checkbox"/>	Engagement Channel Types	<input type="checkbox"/>									
Business Brands	<input type="checkbox"/>	Ideas	<input type="checkbox"/>									
Communication Subscriptions	<input type="checkbox"/>	Individuals	<input type="checkbox"/>									
Communication Subscription Channel Types	<input type="checkbox"/>	Labels	<input type="checkbox"/>									
Communication Subscription Consents	<input type="checkbox"/>	Locations	<input type="checkbox"/>									
Communication Subscription Timings	<input type="checkbox"/>	Party Consents	<input type="checkbox"/>									
Contacts	<input type="checkbox"/>	Push Topics	<input type="checkbox"/>									
Contact Point Addresses	<input type="checkbox"/>	Sellers	<input type="checkbox"/>									
Contact Point Consents	<input type="checkbox"/>	Not Checked	<input type="checkbox"/>									
Contact Point Emails	<input type="checkbox"/>	Training Channels	<input type="checkbox"/>									
							User External Credentials	<input type="checkbox"/>				

Custom Object Permissions

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
AppLogs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FlowPersonalConfigurations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Book Line Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FlowTableViewDefinitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Book Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Properties	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Property	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Task 7: Create a Checkbox Field on User

Objective: Create a checkbox field on the user object based on business requirements.

- **Activity:**

- a. Create a new field named "Verified" on the User object with the data type "Checkbox."

The screenshot shows the Salesforce Setup interface under the Object Manager. A new field named 'Verified' has been created on the User object. The field is of type Checkbox and is indexed. The search bar at the top right contains 'Verified'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Verified	Verified__c	Checkbox		Indexed

The screenshot shows the Salesforce classic interface under the Content tab. A custom field named 'Verified' has been created on the User object. The field is of type Checkbox and is indexed. The search bar at the top left contains 'Verified'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Verified	Verified__c	Checkbox		Indexed

Task 8: Create Users

Objective: Create users with different roles and profiles.

- **Activity:**

- a. **User 1:** Sales Executive with the System Administrator profile.

User Executive

Name: Executive
Alias: exec
Email: gaxoh41012@paxnw.com [Verify]
Username: gaxoh41012@paxnw.com
Nickname: User1728133229608250959

Role: Sales Executive
User License Profile: System Administrator

Marketing User: Active
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Mobile Push Registrations: Data.com User Type View
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling: checked
Send Apex Warning Emails
Salesforce CRM Content User: checked
Receive Salesforce CRM Content: checked

- b. **User 2:** Manager with the Manager profile.

User Manager

Name: Manager
Alias: mana
Email: nojewam757@paxnw.com [Verify]
Username: nojewam757@paxnw.com
Nickname: User17281233966917158720

Role: Sales Manager
User License Profile: Salesforce Platform

Marketing User: Active
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Mobile Push Registrations: Data.com User Type View
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling: checked
Salesforce CRM Content User: checked
Receive Salesforce CRM Content: checked
Email Alerts
Alerts as Daily Digest

c. **User 3: Customer with the Customer profile, "Verified" checkbox unchecked.**

User Detail

Name	Customer	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	mamofom949@paxnw.com [Verify]	Profile	Customer
Username	mamofom949@paxnw.com	Active	<input checked="" type="checkbox"/>
Nickname	User17281234916506250859	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver	Manager	Data.com User Type	View
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Federation ID		Debug Mode	<input type="checkbox"/>
App Registration: One-Time Password Authenticator	[View]	High-Contrast Palette on Charts	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	[View]	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	[View]	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Lightning Login	[View]	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate]	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
		Make Setup My Default Landing Page	<input type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		No MRU Updates	<input type="checkbox"/>
		Call Center	<input type="checkbox"/>
		Phone	<input type="checkbox"/>
		Extension	<input type="checkbox"/>
		Fax	<input type="checkbox"/>
		Mobile	<input type="checkbox"/>
		Email Encoding	Unicode (UTF-8)
		Employee Number	
		Used Data Space	0 B [View]
		Used File Space	0 B [View]
		Last Login	
Verified	<input type="checkbox"/>	Last Password Change or Reset	05/10/2024, 3:49 pm
		Failed Login Attempts	0 [View]

d. **User 4: Customer2 with the Customer profile, "Verified" checkbox checked.**

User Detail

Name	Customer2	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	lisay2523@skrank.com [Verify]	Profile	Customer
Username	lisay2523@skrank.com	Active	<input checked="" type="checkbox"/>
Nickname	User17281234116718096	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver	Manager	Data.com User Type	View
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Federation ID		Debug Mode	<input type="checkbox"/>
App Registration: One-Time Password Authenticator	[View]	High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: Salesforce Authenticator	[View]	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	[View]	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Lightning Login	[View]	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate]	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
		Make Setup My Default Landing Page	<input type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		No MRU Updates	<input type="checkbox"/>
		Call Center	<input type="checkbox"/>
		Phone	<input type="checkbox"/>
		Extension	<input type="checkbox"/>
		Fax	<input type="checkbox"/>
		Mobile	<input type="checkbox"/>
		Email Encoding	Unicode (UTF-8)
		Employee Number	
		Used Data Space	0 B [View]
		Used File Space	0 B [View]
		Last Login	
Verified	<input checked="" type="checkbox"/>	Last Password Change or Reset	05/10/2024, 3:49 pm
		Failed Login Attempts	0 [View]

Task 9: Create an Approval Process for the Property Object

Objective: Establish an approval process for the Property object.

- **Activity:**

- Create a "Property Approval" process with criteria such as "Location is not blank" and "Verified equals false." Assign Managers and Sales Executives as approvers, and update the Verified status based on approval outcomes.

The screenshot shows the Salesforce Approval Processes page. The process is named 'Property: Property Approval'. It has the following details:

- Process Name:** Property Approval
- Unique Name:** Property_Approval
- Description:** Property: Location NOT EQUAL TO null AND [Current User: Verified EQUALS False]
- Entry Criteria:** (Property: Location NOT EQUAL TO null) AND ([Current User: Verified EQUALS False])
- Record Editability:** Administrator OR Current Approver
- Approval Assignment Email Template:** Initial Submitters
- Initial Submitters:** Role: Sales Manager, Property Owner
- Created By:** Harshvardhan Singh Chauhan, 05/10/2024, 4:03 pm
- Active:** Yes
- Next Automated Approver Determined By:** Manager of Record Submitter
- Allow Submitters to Recall Approval Requests:** No
- Modified By:** Harshvardhan Singh Chauhan, 06/10/2024, 11:49 am

The page also shows sections for **Initial Submission Actions**, **Approval Steps**, **Final Approval Actions**, and **Final Rejection Actions**. The **Approval Steps** section contains one step named 'VP Approval' with an 'Approval Actions' type. The **Final Approval Actions** section contains an action named 'Record Lock'.

Salesforce Home Chatter Libraries Content Subscriptions +

Quick Find / Search... Search

Approval Process Edit Help for this Page

Property Approval

Step 2. Specify Entry Criteria Step 2 of 6

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	AND
Property: Location	not equal to		AND
Current User: Verified	equals	False	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Previous Save Next Cancel

Salesforce Home Chatter Libraries Content Subscriptions +

Quick Find / Search... Search

Approval Process Edit Help for this Page

Property Approval

Step 3. Specify Approver Field and Record Editability Properties Step 3 of 6

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

Record Editability Properties

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

Previous Save Next Cancel Next

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Quick Find / Search... Expand All | Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administrator

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration

Approval Process Edit

Property Approval

Step 5. Select Fields to Display on Approval Page Layout Step 5 of 6

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields	Selected Fields
Created By Last Modified By Verified	Property Name Owner Property Name Location Type

Add Remove Up Down

[Click here to view an example](#)

Display approval history information in addition to the fields selected above.

Security Settings

Allow approvers to access the approval page only from within the Salesforce application. (Recommended)

Allow approvers to access the approval page from within the Salesforce application, or externally from a wireless-enabled mobile device.

Previous Save Next Cancel

Home Chatter Libraries Content Subscriptions +

Quick Find / Search... Search

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administrator

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync

All Workflow Field Updates

Help for this Page

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View: [All Workflow Field Updates](#) [Edit](#) | [Create New View](#)

Action	Name	Field to Update	Operation	Value	Last Modified Date
Edit Del	UnVerified_Property	Property: Verified	Value	False	05/10/2024
Edit Del	Verified_Property	Property: Verified	Value	True	05/10/2024
Edit Del	Changes the case priority to high.	Case: Priority	Value	High	05/10/2024

[New Field Update](#)

Switch to Lightning Experience Harshvardhan Sin... Setup Help Content

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Quick Find / Search... Search

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Verified Property

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Identification

Name: **Verified Property** Unique Name: **Verified_Property** Description:

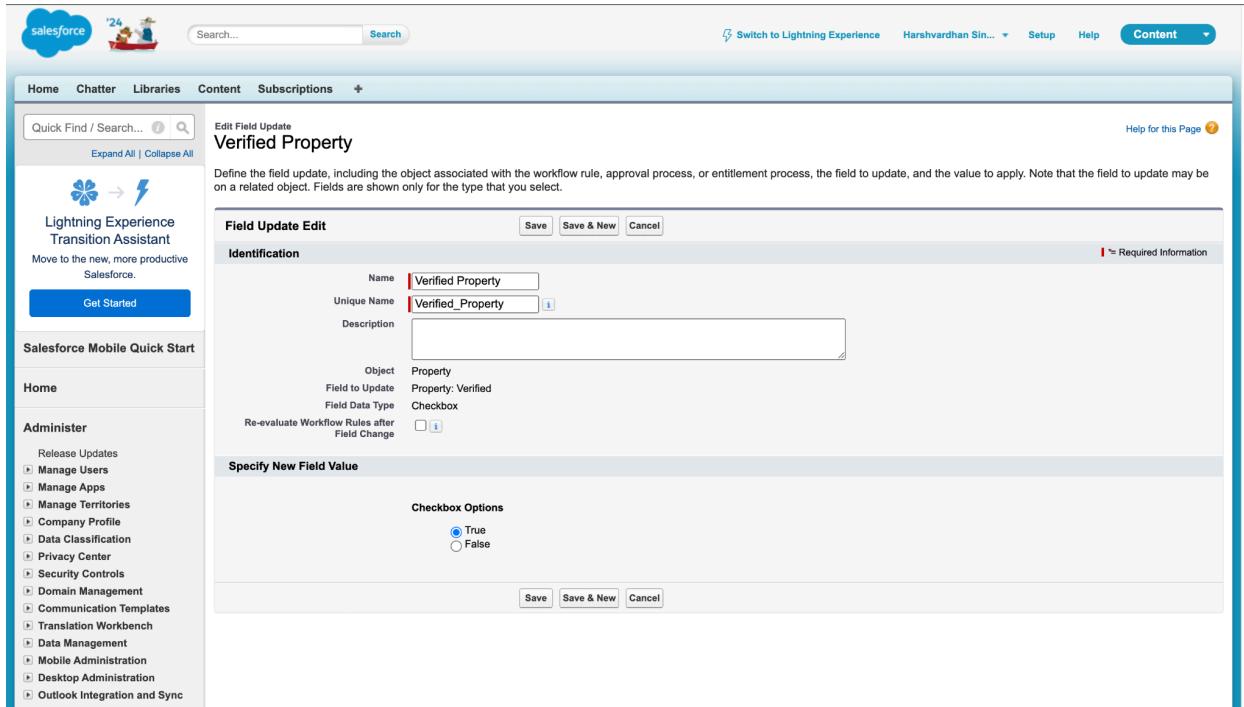
Object: **Property** Field to Update: **Property: Verified** Field Data Type: **Checkbox** Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Checkbox Options

True False

Save Save & New Cancel



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Quick Find / Search... Search

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UnVerified Property

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Identification

Name: **UnVerified Property** Unique Name: **UnVerified_Property** Description:

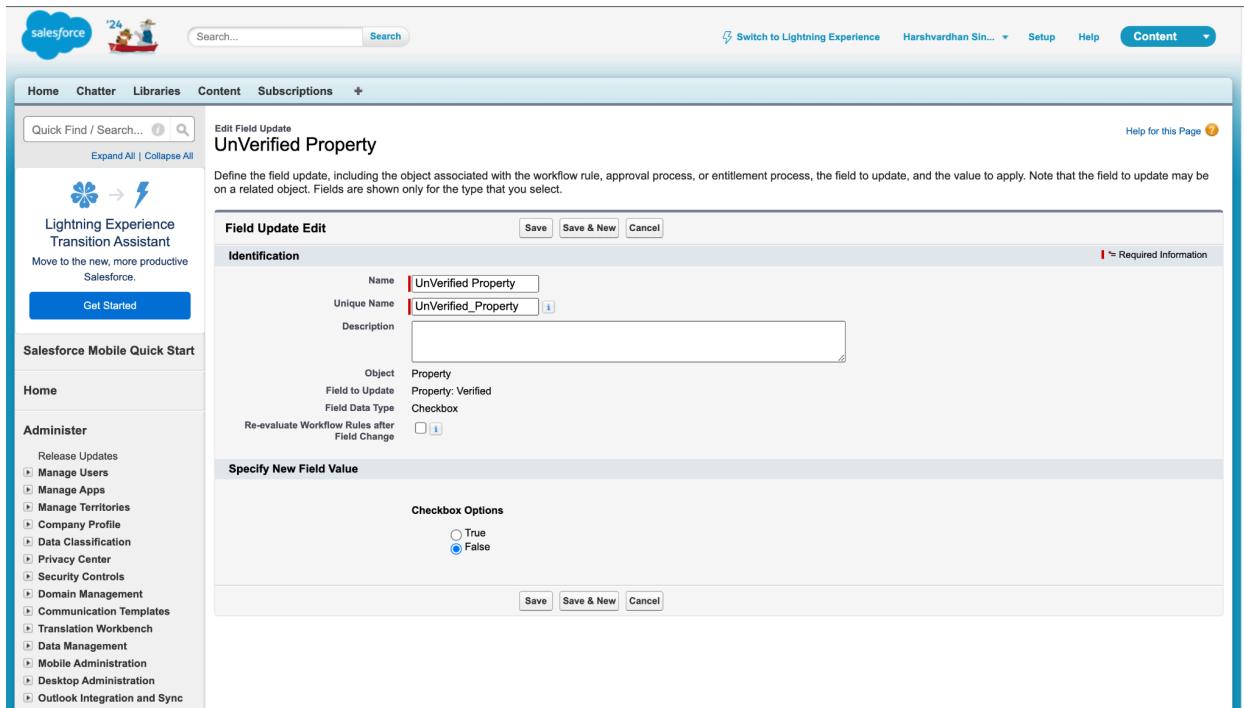
Object: **Property** Field to Update: **Property: Verified** Field Data Type: **Checkbox** Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Checkbox Options

True False

Save Save & New Cancel



Task 10: Create a Record Trigger Flow for Approval

Objective: Automatically submit the approval process when a property record is created.

- **Activity:**

- Develop a Record Trigger Flow that triggers when a new property record is created and submits the record for approval.

The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected under 'Process Automation'. The search bar at the top contains 'flows'. The main area displays a list of flows with one item visible: 'Property Approval' (Autolaunched Flow, Unmanaged, Last Modified By: Harshvardhan Singh Chauhan, Last Modified Date: 05/10/2024, 4:38 pm). The interface includes standard Salesforce navigation elements like Home, Object Manager, and a sidebar with Process Automation categories.

The screenshot shows the Flow Builder interface for the 'Property Approval - V1' flow. The flow consists of three main components: 'Record-Triggered Flow Start', 'Run Immediately', 'Approval for property Action', and 'End'. The 'Approval for property Action' component is currently selected, opening a configuration dialog titled 'Submit for Approval'. The dialog includes fields for 'Label' (set to 'Approval for property'), 'API Name' (set to 'Approval_for_property'), and a 'Description' field. Below the dialog, there is a section for 'Set Input Values for the Selected Action' with several input fields: 'Record ID' (set to 'Triggering Property__c > Record ID'), 'Approval Process Name Or ID' (disabled), 'Next Approver IDs' (disabled), and 'Skip Entry Criteria' (disabled). The interface also features standard Salesforce navigation buttons like 'Select Elements', 'Auto-Layout', and various save and run buttons.

Task 11: Create an App Page

Objective: Build an app page for property search functionality.

- **Activity:**

- a. Create an app page labeled "Search Your Property" and add it to the Property Details app.

The screenshot shows the Salesforce Lightning App Builder interface. At the top, there's a navigation bar with links for Home, Chatter, Libraries, Content, Subscriptions, and a search bar. Below the navigation is a sidebar with a 'Lightning Experience Transition Assistant' section and a 'Get Started' button. The main area is titled 'Lightning App Builder' and contains a 'Lightning Pages' table. The table has columns for Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. One row is visible: 'Edit | Clone | Del' for 'Search your Property' (Label), 'Search_your_Property' (Name), 'App Page' (Type), and 'HSing, 05/10/2024, 4:40 pm' (Created By). The table also includes a 'New' button and a link to 'Create New View'. A help link 'Help for this Page' is at the top right of the main area.

The screenshot shows a modal dialog titled 'Activation: Search your Property'. The dialog has tabs for 'PAGE SETTINGS', 'LIGHTNING EXPERIENCE', and 'MOBILE NAVIGATION'. Under 'PAGE SETTINGS', it says 'Add this app page to Lightning Experience apps. You can manage Lightning apps in Setup.' Under 'LIGHTNING EXPERIENCE', there's a list of 'Add to Lightning Apps' including Data Manager, Dreamscape Bookshop, LightningBolt, LightningInstrumentation, Property Details (which is selected and highlighted with a blue border), Queue Management, Sales, and Sales Console. Under 'MOBILE NAVIGATION', there's a 'Property Details' section with a 'Remove page' button and three items: 'Property', 'Search your Property', and 'Customer'. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

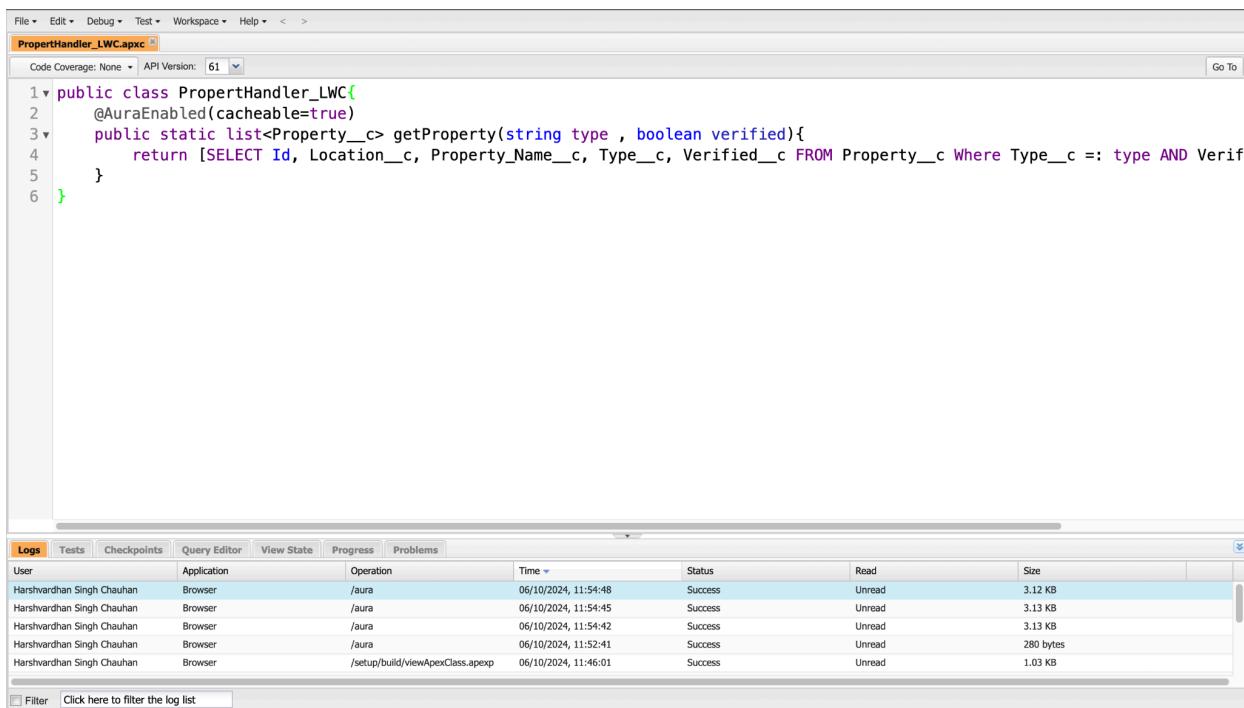
Task 12: Create a Lightning Web Component (LWC)

Objective: Develop an LWC component to manage property access for verified and unverified customers.

- **Activity:**

- Develop the LWC component with Apex logic to handle property visibility based on customer verification status.

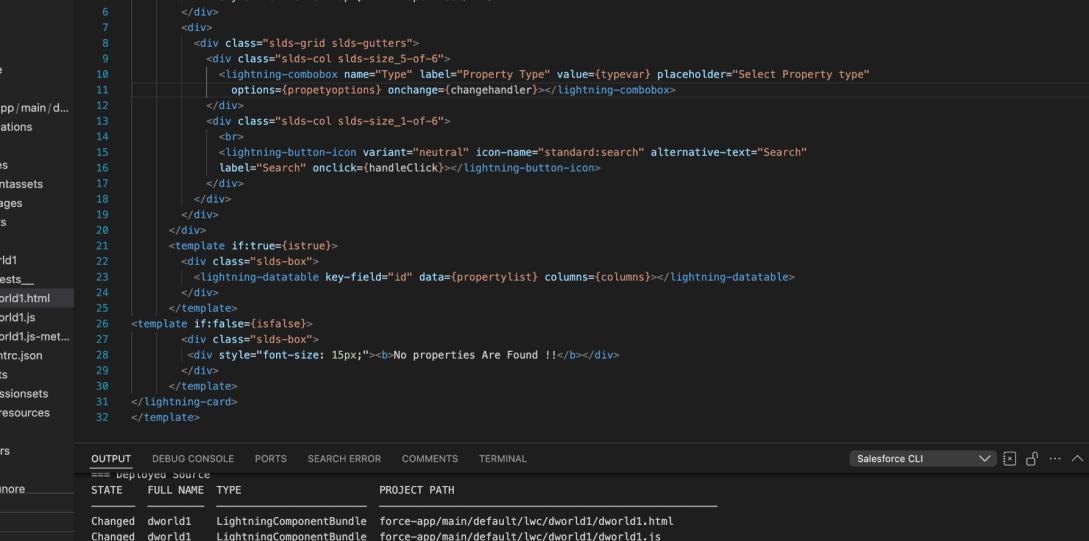
- APEX CLASSES



The screenshot shows the Salesforce IDE interface. The top half displays the code editor for a class named `PropertHandler_LWC.apxc`. The code implements a static method `getProperty` that queries the database for properties based on their type and verification status. The bottom half shows the logs panel, which lists five log entries from a user named Harshvardhan Singh Chauhan, all of which were successful and occurred on 06/10/2024 at various times between 11:54:48 and 11:54:45. The logs also mention file operations like `/setup/build/viewApexClass.apexp`.

```
1 v public class PropertHandler_LWC{  
2     @AuraEnabled(cacheable=true)  
3     public static list<Property__c> getProperty(string type , boolean verified){  
4         return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM Property__c WHERE Type__c =: type AND Verified__c =: verified];  
5     }  
6 }
```

User	Application	Operation	Time	Status	Read	Size
Harshvardhan Singh Chauhan	Browser	/aura	06/10/2024, 11:54:48	Success	Unread	3.12 KB
Harshvardhan Singh Chauhan	Browser	/aura	06/10/2024, 11:54:45	Success	Unread	3.13 KB
Harshvardhan Singh Chauhan	Browser	/aura	06/10/2024, 11:54:42	Success	Unread	3.13 KB
Harshvardhan Singh Chauhan	Browser	/aura	06/10/2024, 11:52:41	Success	Unread	280 bytes
Harshvardhan Singh Chauhan	Browser	/setup/build/viewApexClass.apexp	06/10/2024, 11:46:01	Success	Unread	1.03 KB



The screenshot shows the VS Code interface with the Salesforce Extension Pack installed. The left sidebar displays a file tree of a .force-app directory, including LWC components like dworld1. The main editor area shows the HTML template for dworld1.html, which includes a lightning-card component with a search bar and a lightning-datable component for displaying property lists. The bottom right shows the Salesforce CLI terminal with deployment logs.

```
<template>
  <lightning-card>
    <div class="slds-box">
      <div class="slds-text-align_left">
        <h1 style="font-size: 20px;"><b>Properties</b></h1>
      </div>
      <div>
        <div class="slds-grid slds-gutters">
          <div class="slds-col slds-size_5-of-6">
            <lightning-combobox name="Type" label="Property Type" value={typevar} placeholder="Select Property type" options={propertyoptions} onchange={changehandler}></lightning-combobox>
          </div>
          <div class="slds-col slds-size_1-of-6">
            <br>
            <lightning-button-icon variant="neutral" icon-name="standard:search" alternative-text="Search" label="Search" onclick={handleClick}></lightning-button-icon>
          </div>
        </div>
        <div>
          <template if:true={istrue}>
            <div class="slds-box">
              <lightning-datable key-field="id" data={propertylist} columns={columns}></lightning-datable>
            </div>
          </template>
          <template if:false={isfalse}>
            <div class="slds-box">
              <div style="font-size: 15px;"><b>No properties Are Found !</b></div>
            </div>
          </template>
        </div>
      </div>
    </lightning-card>
  </template>
```

OUTPUT	DEBUG CONSOLE	PORTS	SEARCH ERROR	COMMENTS	TERMINAL
==== deployed Source					Salesforce CLI
STATE	FULL NAME	TYPE		PROJECT PATH	
Changed	dworld1	LightningComponentBundle		force-app/main/default/lwc/dworld1/dworld1.html	
Changed	dworld1	LightningComponentBundle		force-app/main/default/lwc/dworld1/dworld1.js	
Changed	dworld1	LightningComponentBundle		force-app/main/default/lwc/dworld1/dworld1.js-meta.xml	

10:58:06.998 ended SFDX: Deploy This Source to Org

The screenshot shows the Salesforce Dev Hub interface with a dark theme. On the left is a sidebar with various icons for search, SF World, force-app, MySQL, running tasks, zip explorer, and code pets. The main area displays the project structure under 'OPEN EDITORS' and a code editor window.

OPEN EDITORS

- dworld1.html
- dworld1.js
- dworld1.js-meta.xml

SF_WORLD

- .husky
- .sf
- .sfdx
- .vscode
- config

force-app/main/d...

- applications
- aura
- classes
- contentassets
- flexipages
- layouts
- lwc**
- dworld1**
- __tests__
- dworld1.html
- dworld1.js
- dworld1.js-meta.xml
- .eslintrc.json

OUTPUT DEBUG CONSOLE PORTS SEARCH ERROR COMMENTS TERMINAL

==== Deployed Source

STATE	FULL NAME	TYPE	PROJECT PATH
Changed	dworld1	LightningComponentBundle	force-app/main/default/lwc/dworld1/dworld1.html
Changed	dworld1	LightningComponentBundle	force-app/main/default/lwc/dworld1/dworld1.js
Changed	dworld1	LightningComponentBundle	force-app/main/default/lwc/dworld1/dworld1.js-meta.xml

10:58:06.998 ended SFDX: Deploy This Source to Org

0 0 https://itm-3b-dev-ed.lightning.force.com/ 0 Live Share Share Code Link Generate Commit Message Search Error Apex PMD Prettier

Task 13: Deploy the LWC Component to the App Page

Objective: Add the LWC component to the app page.

- **Activity:**

- Drag and drop the LWC component onto the "Search Your Property" app page and save.

The screenshot shows the Lightning App Builder interface. At the top, there's a navigation bar with 'Lightning App Builder' and 'Pages'. A search bar says 'Search your Property'. Below the navigation are toolbar icons for back, forward, refresh, and other functions. The main area has tabs for 'Desktop' and 'Shrink To View'. On the left, a sidebar titled 'Components' lists various components like Recent Items, Report Chart, Rich Text, and several custom components. A section for 'Custom (4)' includes 'dWorld', 'dwORLD1', 'FormulaBuilder', and 'Sorting Configuration'. A section for 'Custom - Managed (0)' indicates 'No components available'. In the center, a large blue workspace is titled 'Properties' with a sub-section 'Property Type'. It has two empty component slots labeled 'Add Component(s) Here'. On the right, a configuration panel for the 'Page' is open, showing fields for 'Label' ('Search your Property'), 'API Name' ('Search_your_Property'), and 'Page Type' ('App Page'). Other sections include 'Template' (set to 'Header and Left Sidebar'), 'Description' (empty), and 'Actions' (with a 'Select...' button). At the bottom of the workspace is a blue button 'Get more on the AppExchange'.

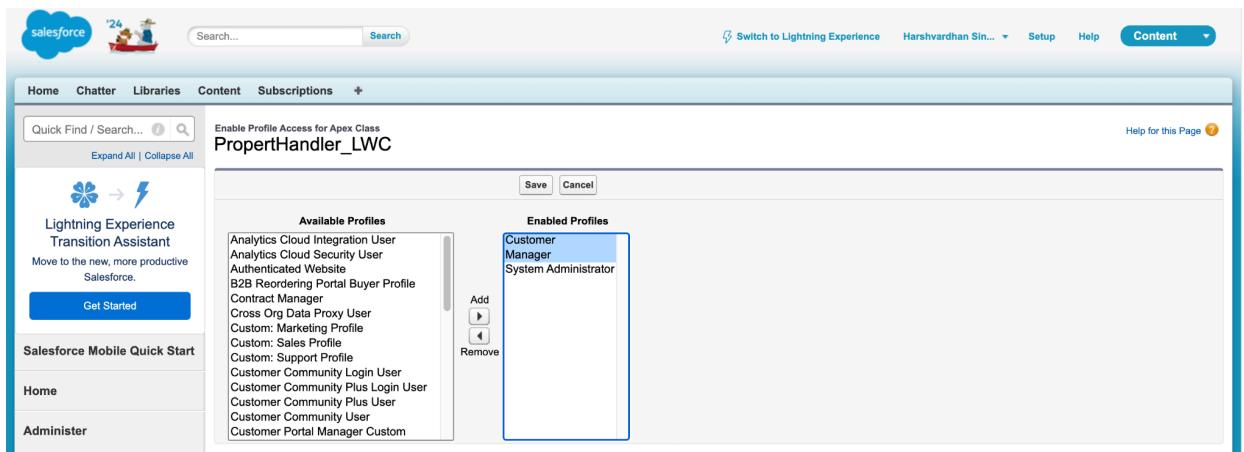
The screenshot shows the deployed app page. At the top, there's a header with a shield icon, a search bar, and navigation links for 'Property Details', 'Property', 'Search your Property', and 'Customer'. Below the header is a search bar with a magnifying glass icon and placeholder text 'Search your Property'. The main content area is titled 'Properties' and contains a 'Property Type' section with a dropdown menu. The dropdown menu is open, showing options: 'Commercial', 'Residential', and 'rental'. The 'Commercial' option is highlighted with a blue border.

Task 14: Assign Apex Class Access to Profiles

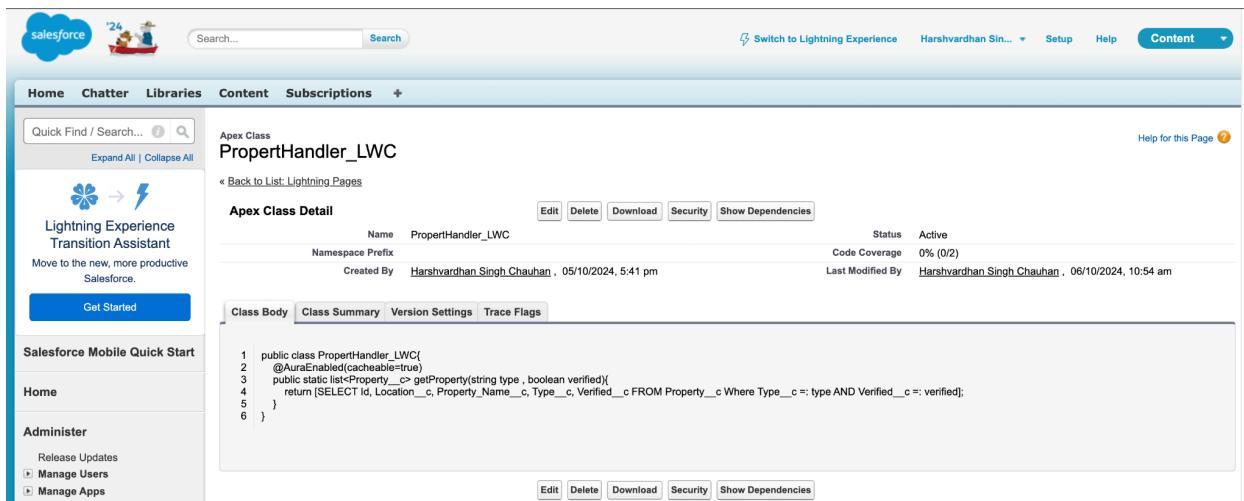
Objective: Set appropriate security access to Apex classes for necessary profiles.

- **Activity:**

- Assign access to the Apex class `PropertyHandler_LWC` to both Manager and Customer profiles.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes Home, Chatter, Libraries, Content, Subscriptions, and a search bar. On the left, there's a sidebar with links like Lightning Experience Transition Assistant, Get Started, and Administer. The main content area is titled 'Enable Profile Access for Apex Class' for 'PropertyHandler_LWC'. It shows two sections: 'Available Profiles' (listing various user profiles) and 'Enabled Profiles' (listing 'Customer Manager' and 'System Administrator', which are highlighted with a blue border). At the bottom right of the modal are 'Save' and 'Cancel' buttons.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes Home, Chatter, Libraries, Content, Subscriptions, and a search bar. On the left, there's a sidebar with links like Lightning Experience Transition Assistant, Get Started, and Administer. The main content area is titled 'Apex Class Detail' for 'PropertyHandler_LWC'. It shows the 'Apex Class Detail' section with fields for Name (PropertyHandler_LWC), Namespace Prefix, Created By (Harshvardhan Singh Chauhan), Status (Active), and Active (0% / 0/2). Below this is the 'Class Body' tab, which displays the following Apex code:

```
1 public class PropertyHandler_LWC{
2     @AuraEnabled(cacheable=true)
3     public static List<Property__c> getProperty(string type , boolean verified){
4         return [SELECT id, Location__c, Property__Name__c, Type__c, Verified__c FROM Property__c WHERE Type__c =: type AND Verified__c =: verified];
5     }
6 }
```

At the bottom of the page are 'Edit', 'Delete', 'Download', 'Security', and 'Show Dependencies' buttons.