

PROJECT DOCUMENTATION FOR YOUR CRM APPLICATION

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

PROJECT DESCRIPTION-:

The CRM (Customer Relationship Management) application is designed to handle clients' information and their property-related requirements. The system will assist real estate agents, brokers, or any other relevant stakeholders to manage clients' data, track property inquiries, manage communication, and streamline their workflows.

PROJECT FLOW-:

- 1 :- Create a Jotform and integrate it with the org to create a record of customers automatically.**
- 2 :-Create a Record trigger flow to submit the Approval Process Automatically.**
- 3 :-Integrate Jotform with Salesforce Platform.**
- 4 :-Create Roles.**
- 5 :-Create a Property Details App.**
- 6 :-Create Profiles.**
- 7 :-Create a Check Box 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 ComponentDrag this Component to your App Page.**
- 13 :-Give Access of Apex Classes to Profiles.**

Milestones and Activities:-

Milestone 1: Jotform Integration with Salesforce

Objective:

Create a Jotform to automatically capture customer details and create records in Salesforce.

Steps:

1. Create Jotform:

- Log in to Jotform and create a form to collect customer details (Name, Phone, Email, Address, Property Type).
- Publish the form.

2. Integrate Jotform with Salesforce:

- On the Jotform platform, click on Integration, choose Salesforce, and select "Add to Form."
- Select your Salesforce Org and choose "Create a Record" action.
- Map the form fields to the Salesforce Customer object fields.
- Save and finish the integration.

Milestone 2: Create Objects and Roles in Salesforce

Objective:

Set up necessary objects and roles for managing customers and properties.

Steps:

1. Create Objects:

- Create “Customer” and “Property” objects in Salesforce using a spreadsheet or manually.

2. Create Roles:

- Add roles like Sales Executive, Sales Manager, and Customer under the role hierarchy.
- Ensure roles are correctly mapped to profiles and permissions.

3. Create Profiles:

- Clone the Salesforce Platform User profile to create custom profiles for Customer and Manager roles.
- Adjust object permissions according to business requirements.

Milestone 3: Build Property Management App

Objective:

Create an app in Salesforce for managing customer and property data.

Steps:

1. Create the Property Details App:

- Use the Salesforce App Manager to create a new Lightning app named “Property Details.”

- Add Customer and Property objects to the app.
- Assign the app to the appropriate profiles.

2. Create an App Page:

- Create a Lightning App Page named “Search Your Property” for displaying property details.
- Add the newly created page to the Property Details app.

Milestone 4: Implement Approval Process

Objective:

Set up an approval process for property records in Salesforce.

Steps:

1. Create an Approval Process:

- Define criteria such as location and verified status for the approval process.
- Assign approval roles and set up field updates for approved and unapproved properties.

2. Automate Approval Submission:

- Create a Record Trigger Flow to automatically submit property

records for approval.

Milestone 5: Develop LWC Component for Property Access

Objective:

Create a Lightning Web Component (LWC) to manage property access for verified and non-verified customers.

Steps:

1. Create LWC Component:

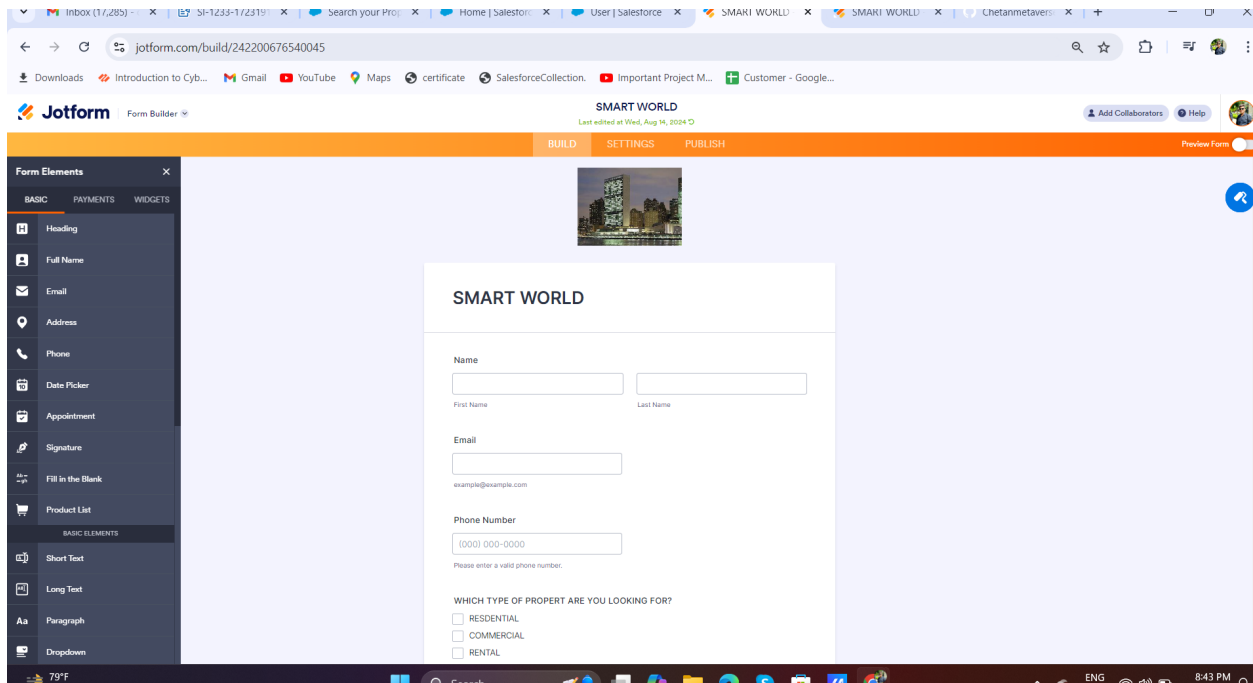
- Develop an LWC component that filters properties based on the customer's verification status.
- Deploy the component to Salesforce and add it to the "Search Your Property" page.

2. Assign Apex Class Security:

- Ensure the PropertyHandler_LWC Apex class has the correct security settings, allowing access for Manager and Customer profiles.

Flow Process Output Screenshots:-

- Open your browser and search for jotform and log in.
- Now create a form to get the customer details like Name, Phone, Email, Address and type of property the customer is interested in.



- Once the form is created, publish it by clicking on publish
<https://form.jotform.com/242200676540045>

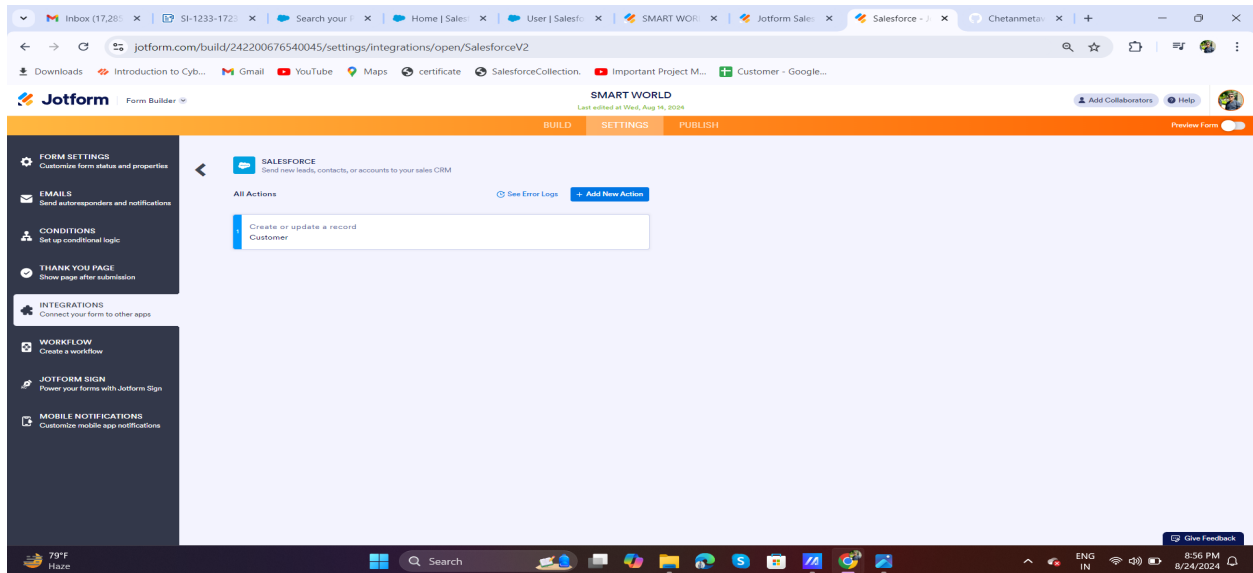
Create Customer object

- Go to your object manager and click on create object from spreadsheet.
- Click on the link to get the spreadsheet
- [customer](#)
- After downloading, upload the file, map the fields and upload to create an object.

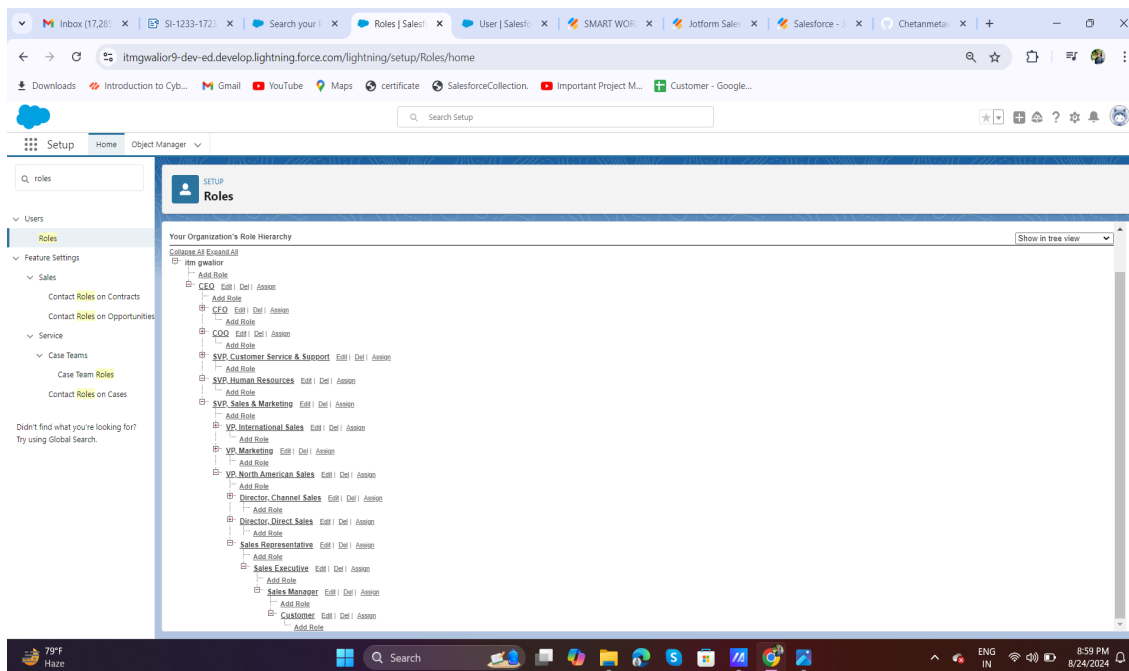
Create Property object

- Follow the same from the customer object to create the Property Object
- [Property](#)

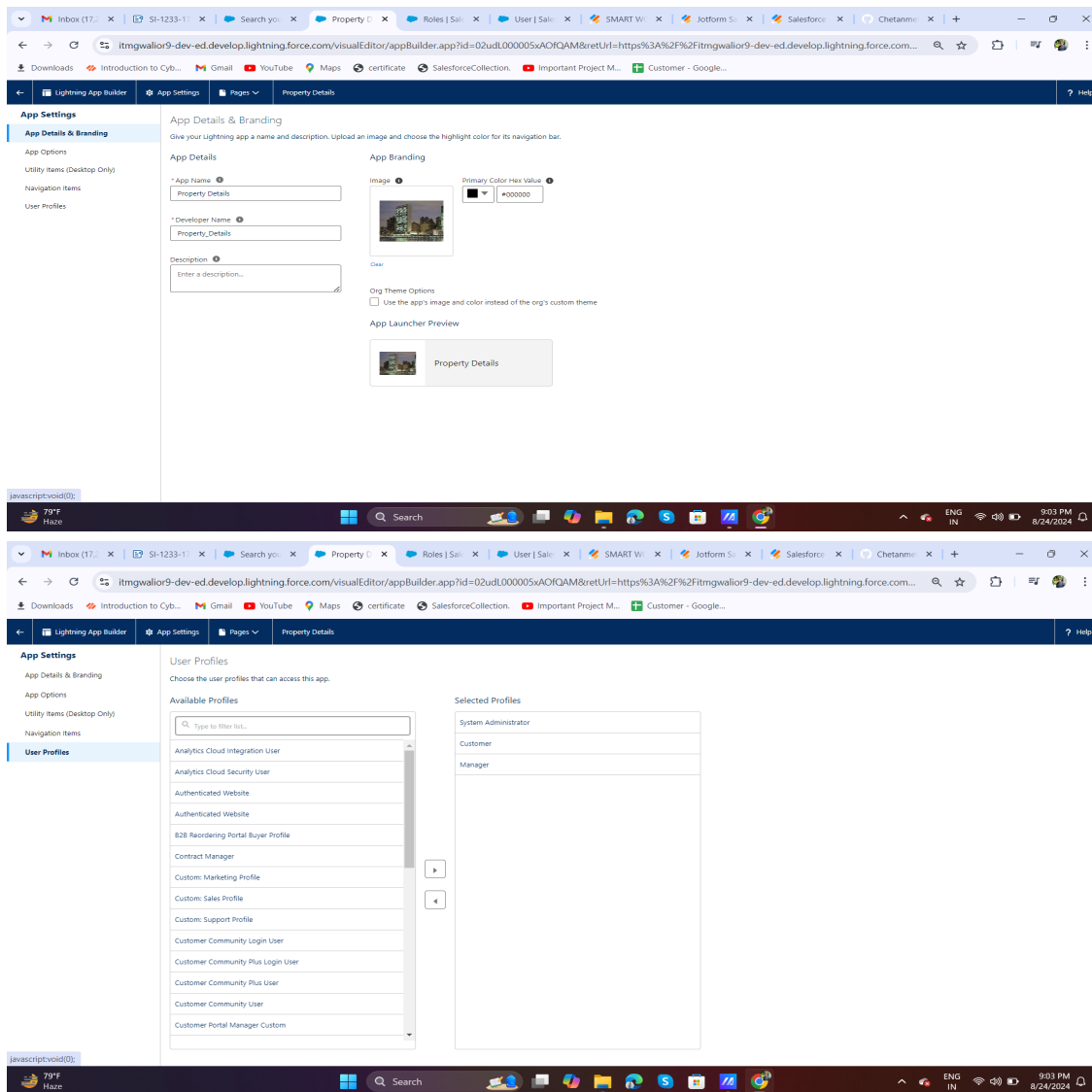
On the Jotform Platform, Click on Integration and choose Salesforce.



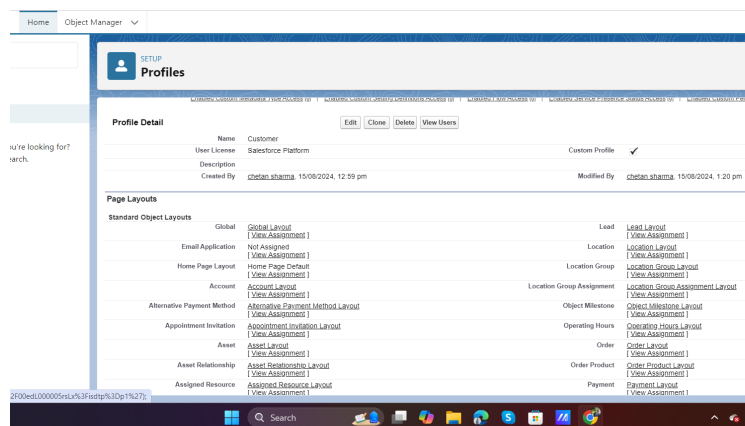
Go to Setup and Click on Roles, then click on Expand all and Add a Role just below the Sales Representative.



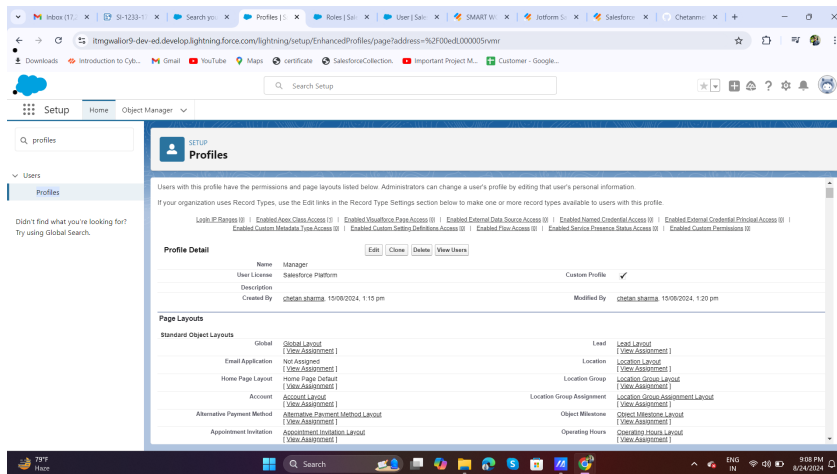
From Setup>> Go to App Manager and click on New Lightning App and Name it as "Property Details" and add "Customer" and "Property" Object



Create Profiles:-



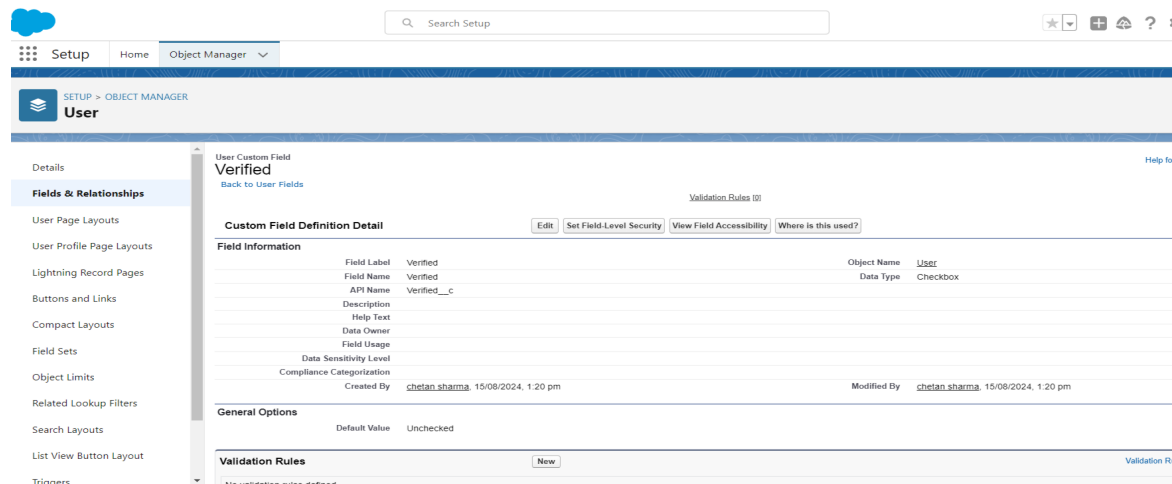
customer



manager

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

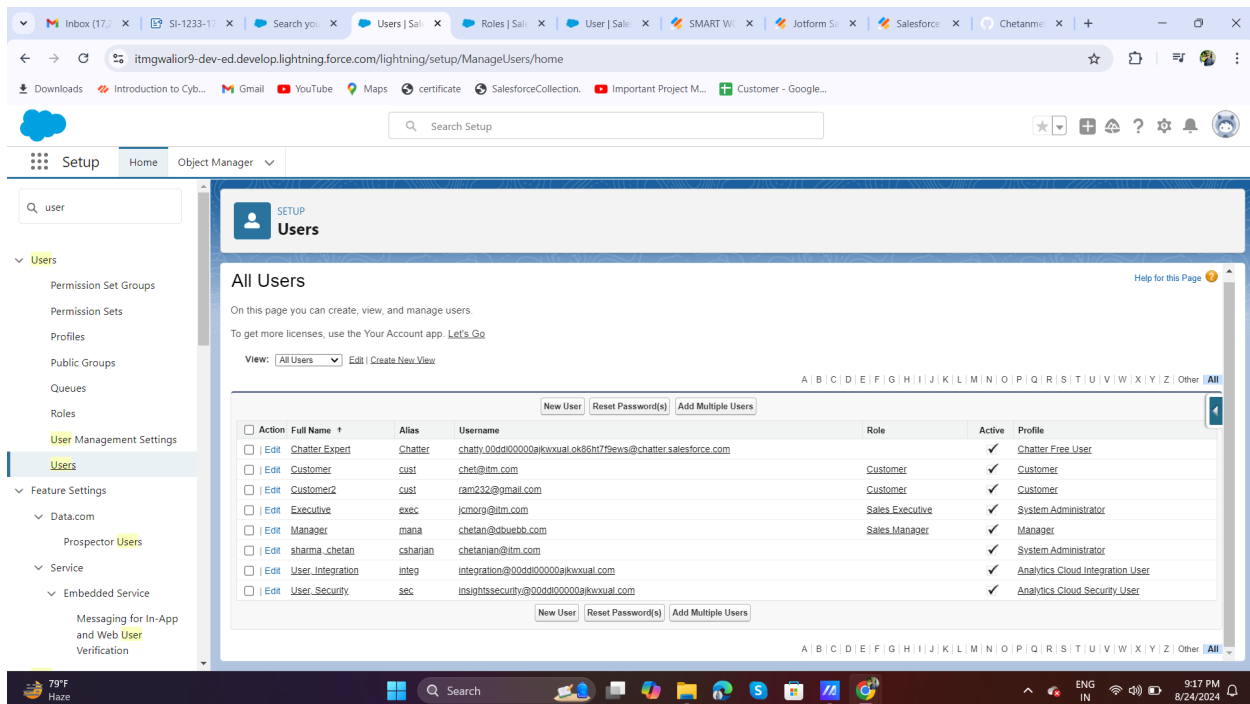
Create new Field Named as “Verified” as Data type “Check Box



Create Users

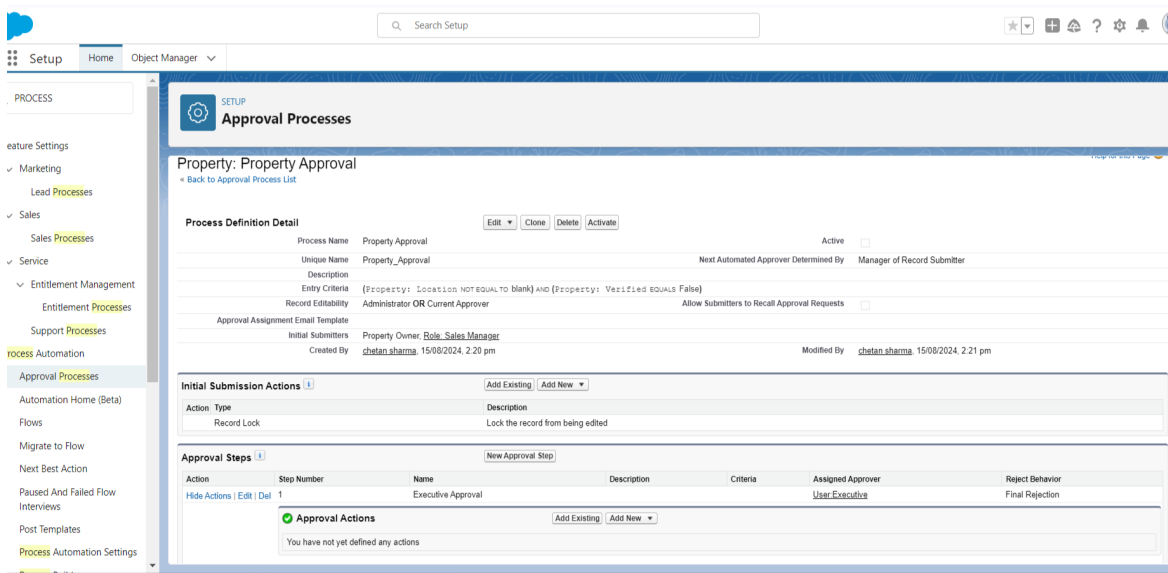
Create three different users with three different Roles and profiles as we have mentioned above.

- EXECUTIVE
- MANAGER
- CUSTOMER
- CUSTOMER2



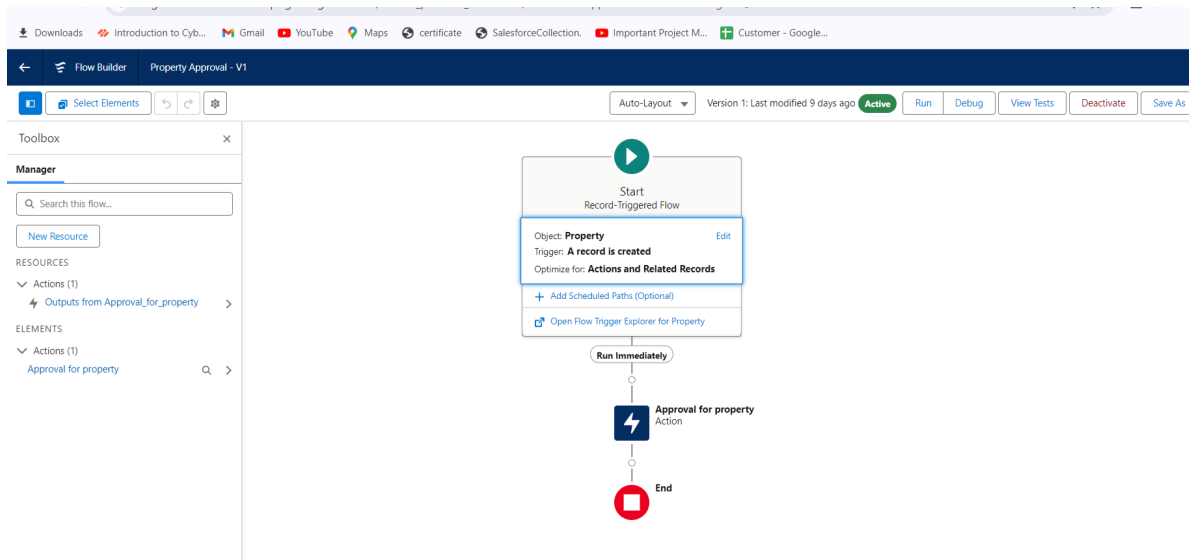
Create an Approval Process for Property Object

An Approval process to approve or reject the records as according

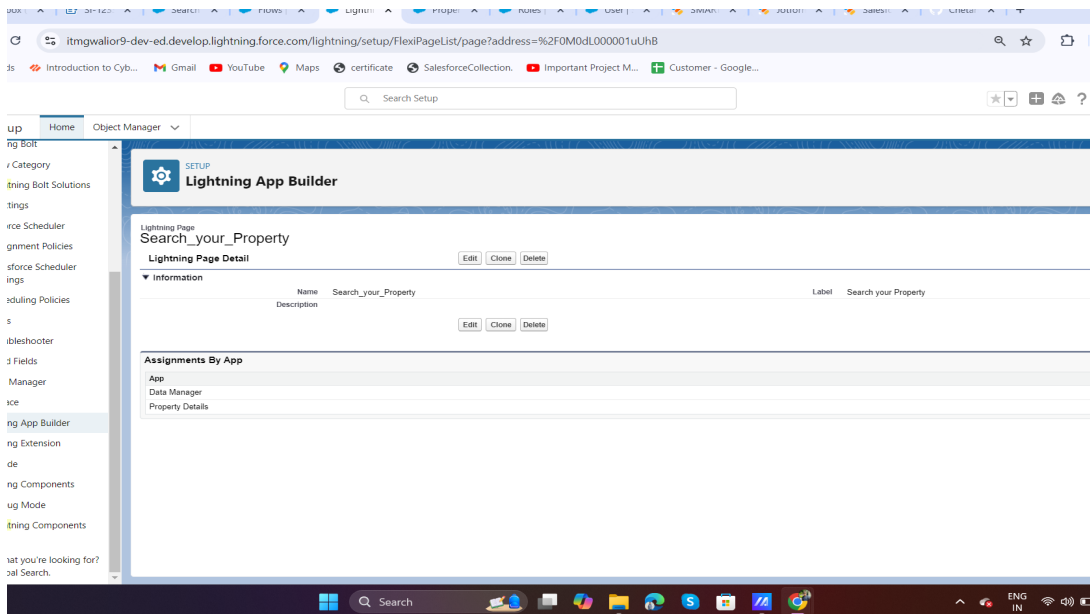


Create a Record trigger flow to submit the Approval Process Automatically.

A flow that can submit the records directly for approval



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



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”


```

1 <?xml version="1.0" encoding="UTF-8"?>
2
3 <LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
4
5   <apiVersion>59.0</apiVersion>
6
7   <isExposed>true</isExposed>
8
9   <targets>
10
11     <target>lightning__RecordPage</target>
12
13     <target>lightning__AppPage</target>
14
15     <target>lightning__HomePage</target>
16
17   </targets>

```

Adding the Component to your Page

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

From Profiles Add "Manager" and "Customer" and "Save".

FINAL PROJECT VIEW

Property Details

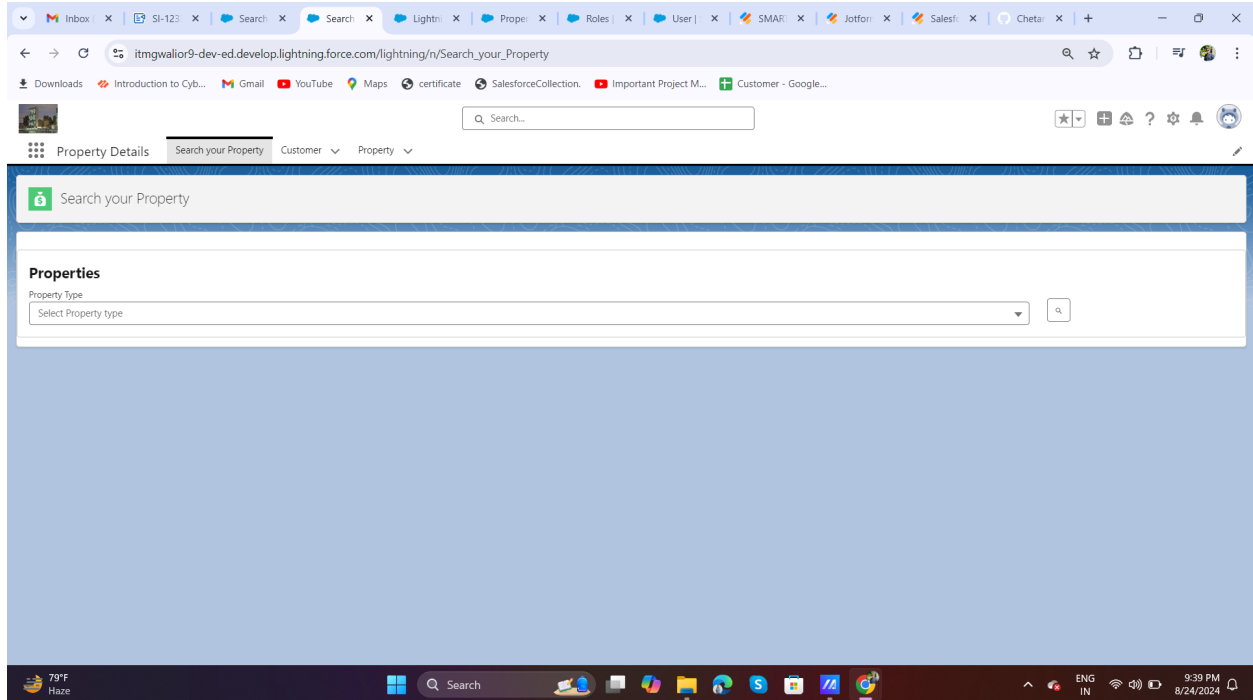
3 Items • Sorted by Property • Filtered by All property • Updated a few seconds ago

Property ?	Property Name	Type	Location	Verified
1 <input type="checkbox"/> a01dL00000PUf2a	Lorus Apartments	Residential	hyderabad	<input type="checkbox"/>
2 <input type="checkbox"/> a01dL00000PUf2b	500000 sq.ft plot	Commercial	Amravati	<input type="checkbox"/>
3 <input type="checkbox"/> a01dL00000PUf2c	3 BHK flat at stanza	rental	Jubilee Hill Hyderabad	<input type="checkbox"/>

Customer

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

Customer Name ↑	Customer	Phone Num...	Email	State	Property Type	Budget Amo...	Street Address	Street Address ...	City	postal code
1 <input type="checkbox"/> a00dL00000IovCQ	Rakesh	788797.0	rakesh@gmail.com	Telangana	Residential	40,00,000	gb road	street no 45	Hyderabad	555001
2 <input type="checkbox"/> a00dL00000IovCR	prakash	55448855	p@gmail.com	Maharashtra	Commercial	80,00,000	gachibowli	indira road	mumbai	6600014
3 <input type="checkbox"/> a00dL00000IovCS	Prajwal	454545.0	prajwal@gmail.com	Maharashtra	Rental	25,000	kamdli	kathora	Amravati	444805



Project Status:-

the project is approximately 90% completed .All major features ,including integration role creations, approval processes and user interface componentss have been implemented .Final testing and adjustments are in progress.

Github repository link:-

<https://github.com/Chetanmetaverse/CRMAPPLICATION-TO-HANDLE-THE-CLIRNTS-AND-THEIR-PROPERTY-RELATED-REQUIREMENT-SALESFORCE/tree/bbbb4350f76e38cd57b3c02f080bb5c07f5dabc0/PROJECTS/projectspace>

The Repository Contains Organized Folder For Code Files,documentation, And Media Assest.

Jotform integration:-

<https://form.jotform.com/242200676540045>

Salesforce Account:-

<https://developer.salesforce.com/signup>

<https://login.salesforce.com>

project demonstration video:-

video link:

[23-10-17.mp4](#)

[23-10-17.mp4](#)

Conclusion:

This CRM system integrates Salesforce to enhance Dreams World Properties' customer engagement, automate processes, and provide personalized property recommendations, driving efficiency and growth in the real estate market.

The application emphasizes ease of use, with a responsive design that works well on various devices. Verified customers are given access to a broader range of property listings, while non-verified customers have limited access, enhancing the personalization of their experience. Property management is further supported by an approval process that requires Sales Managers to review and approve new listings before they are made available.

Security is a key feature, with controlled access to sensitive data and a secure login process. The integration with Salesforce ensures that all data is kept up-to-date automatically, improving efficiency and accuracy across the board. Overall, the CRM application offers a comprehensive solution for managing customer interactions and property listings, tailored to meet the specific needs of Dreams World Properties.

