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

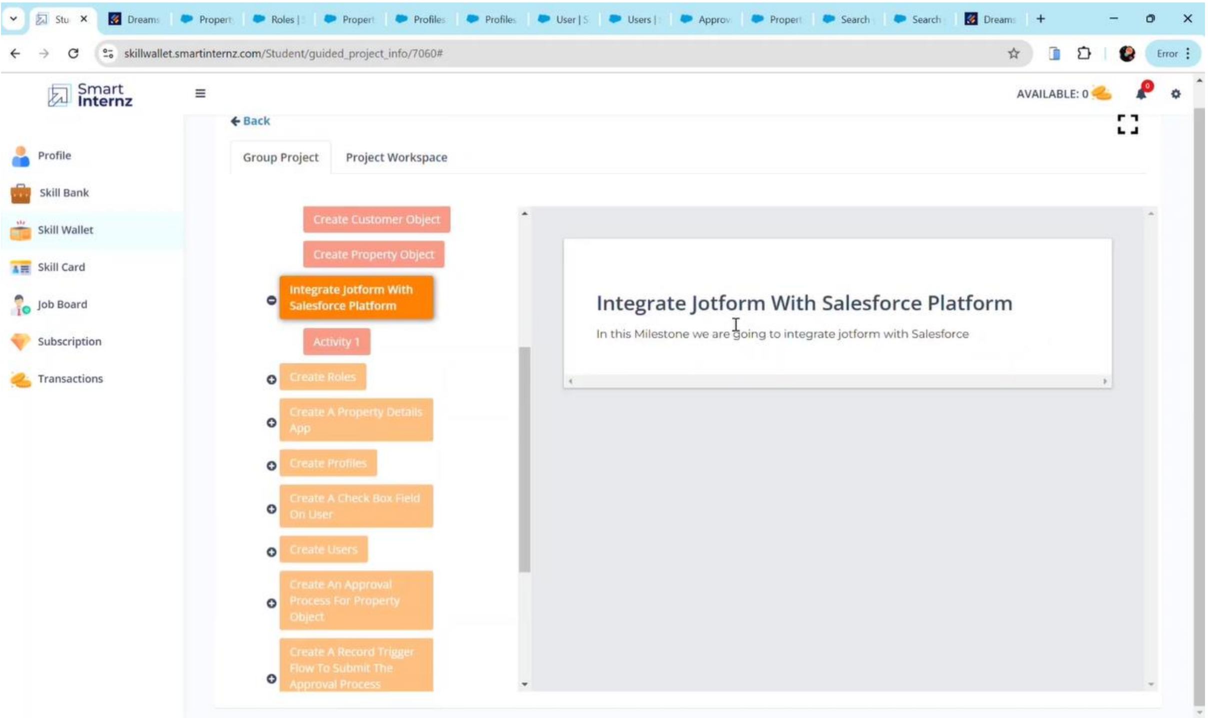
Roshan R-NM ID: 2879C2B299A9EFA8295447D47408E59E

Mani Kandan M-NM ID: 0C75DB39C4858839D1E4D24460CB90EF

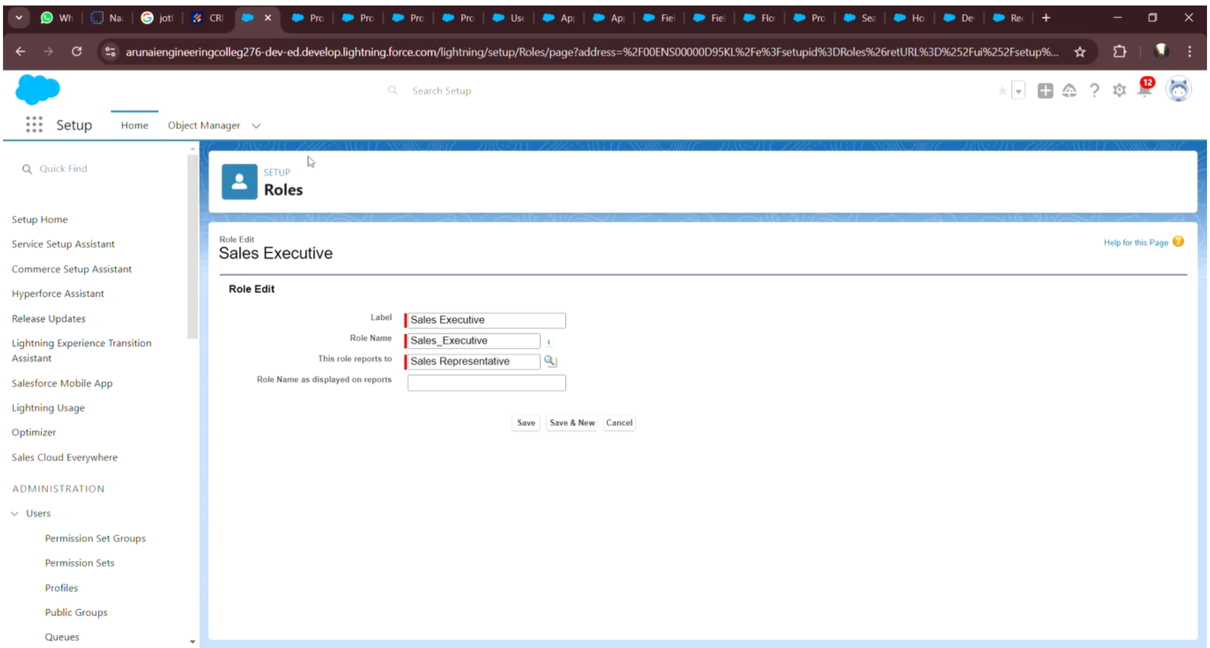
Maria Fernandez F-NM ID: 680B05B403E994DB62942CA4C3569FD6

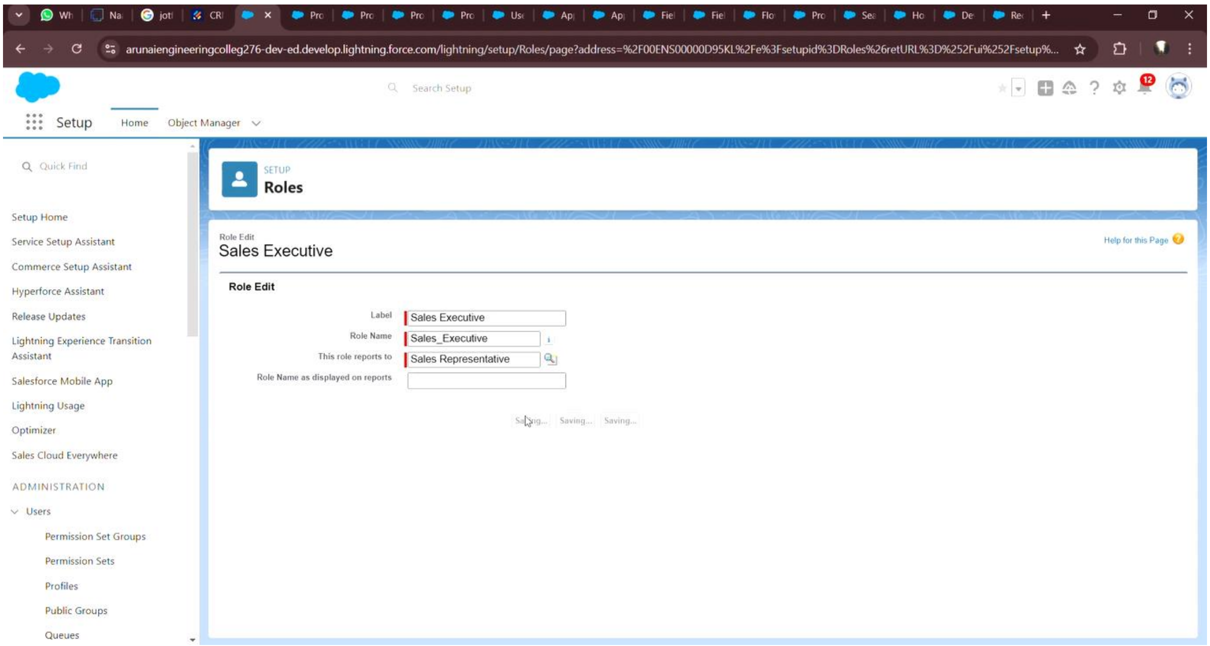
Samuel Rithick R-NM ID: ABAF174A7C77606A9AD48B84D38ACCD5

Milestone 1 :- Create a Jot form and integrate it with the org to create a record of customers automatically.

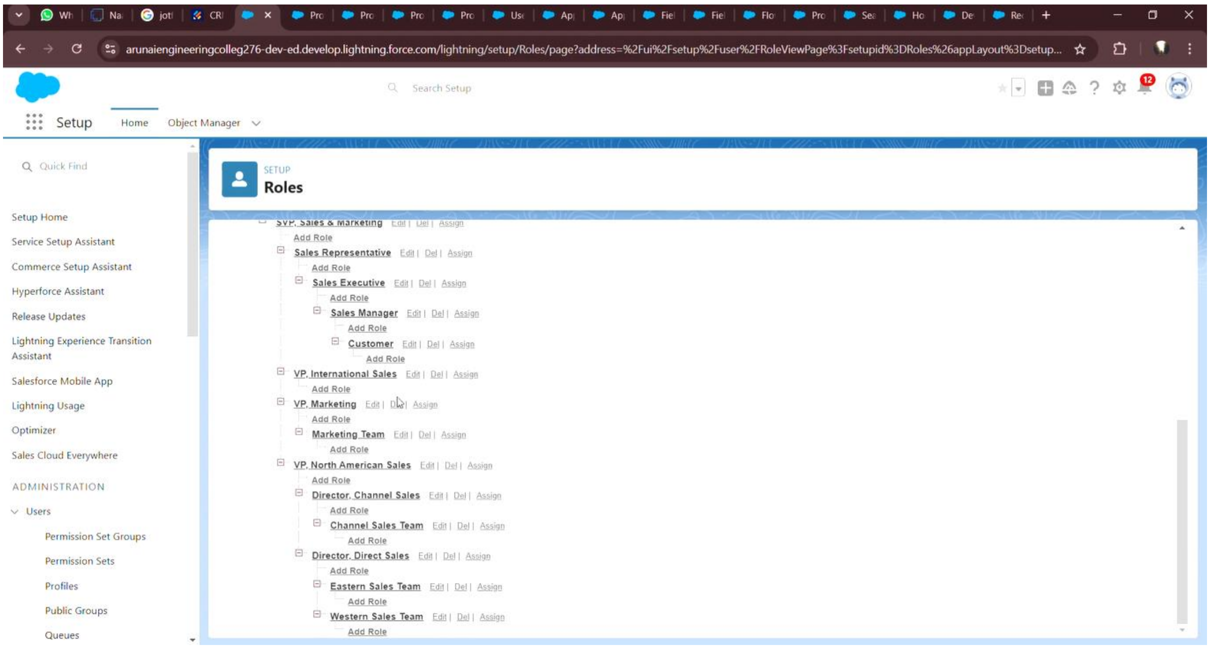


Create Roles:

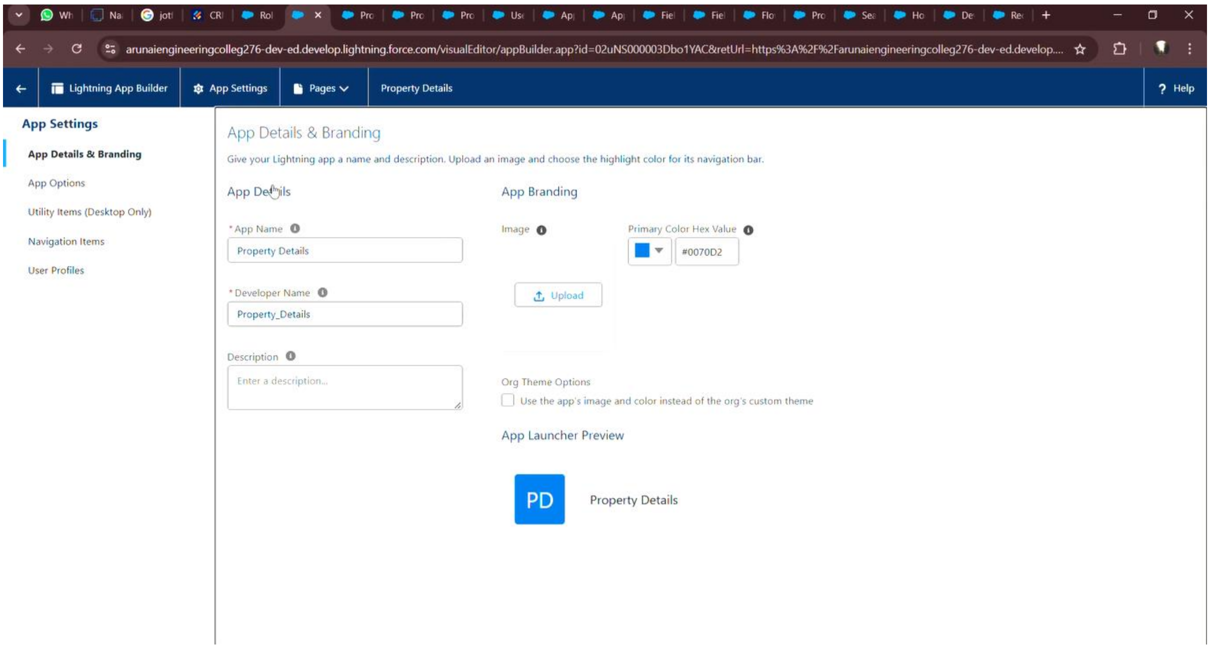




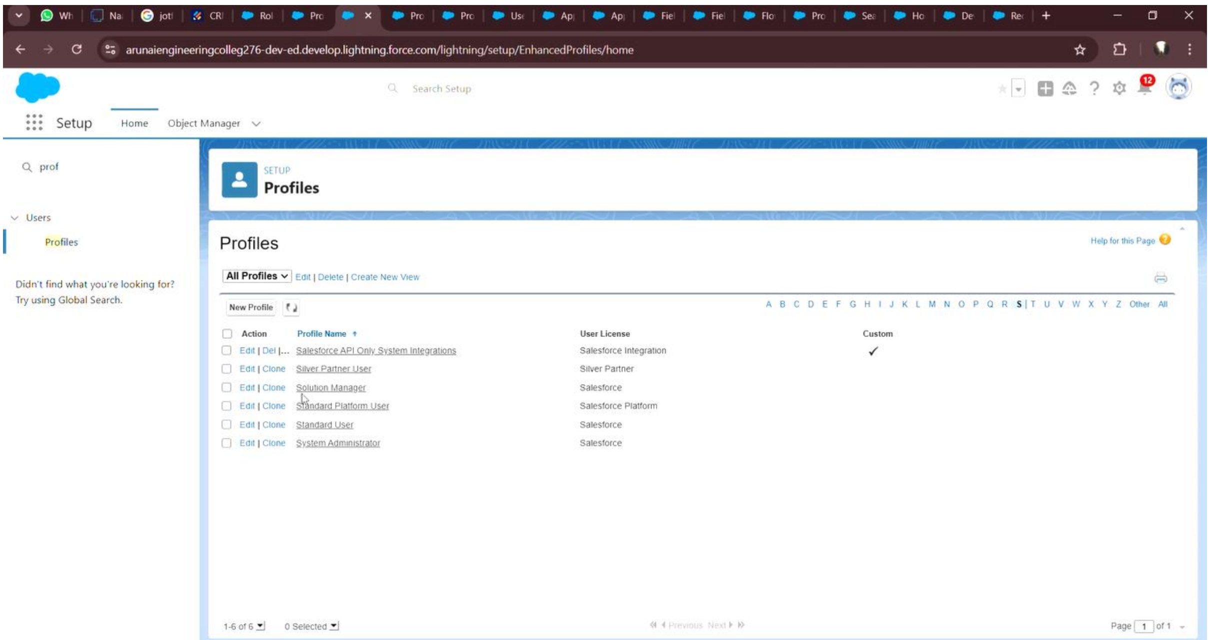
Create Roles as per business requirement :



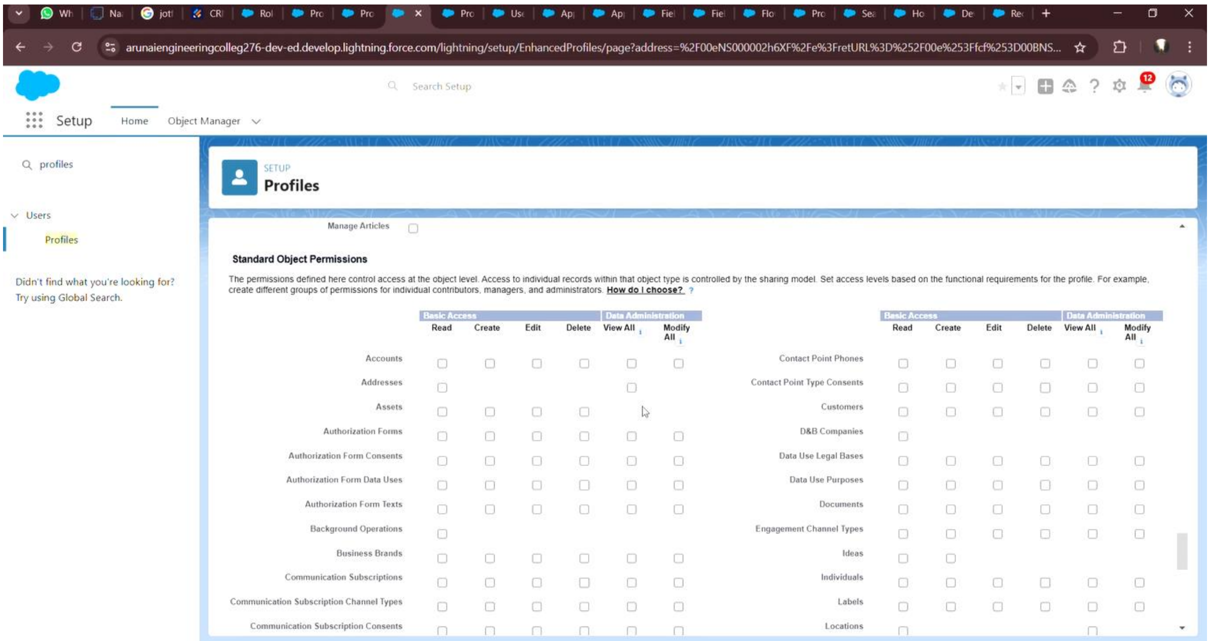
Create a Property Details App:



Create Profiles:

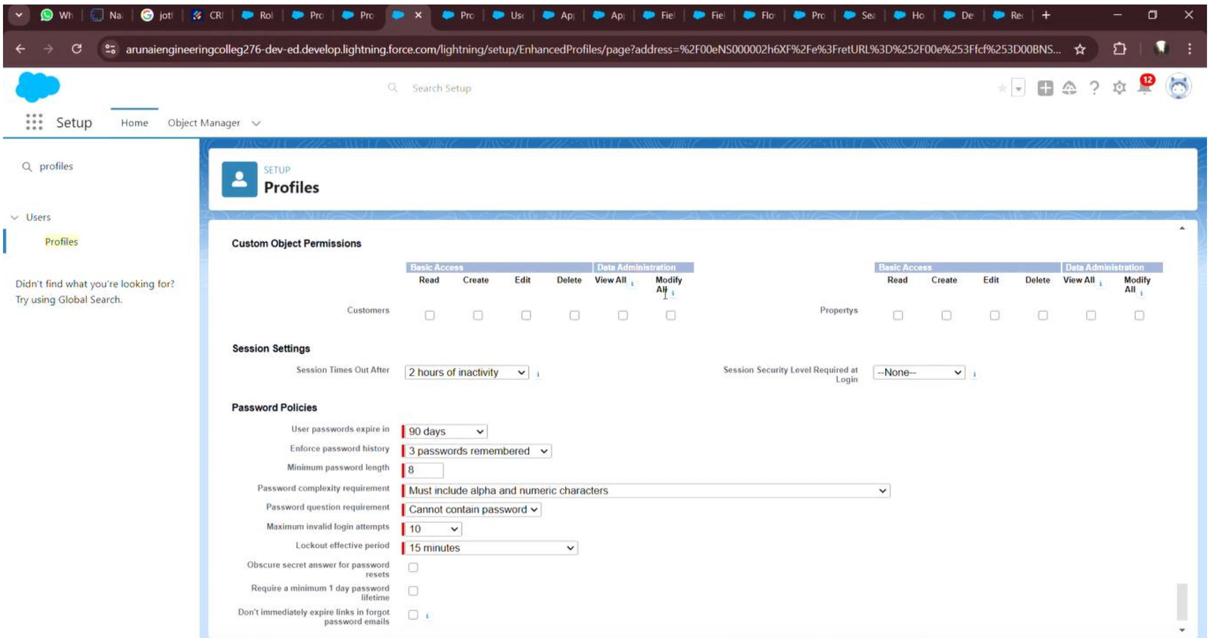


Create profiles as per business requirement :

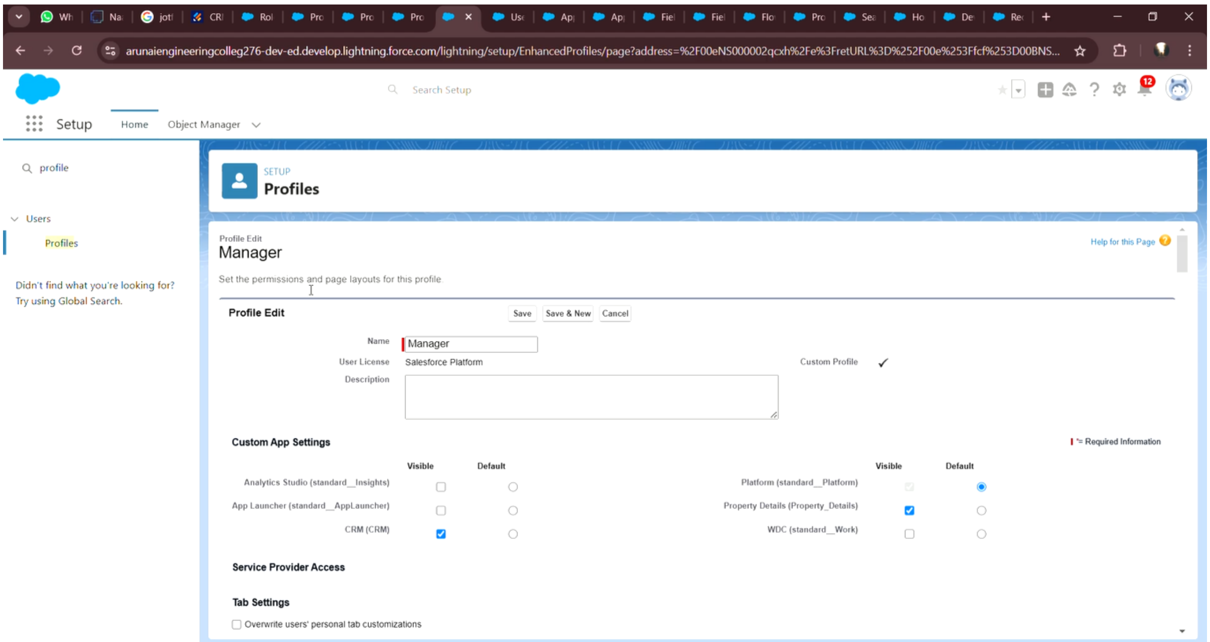


Customer:

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

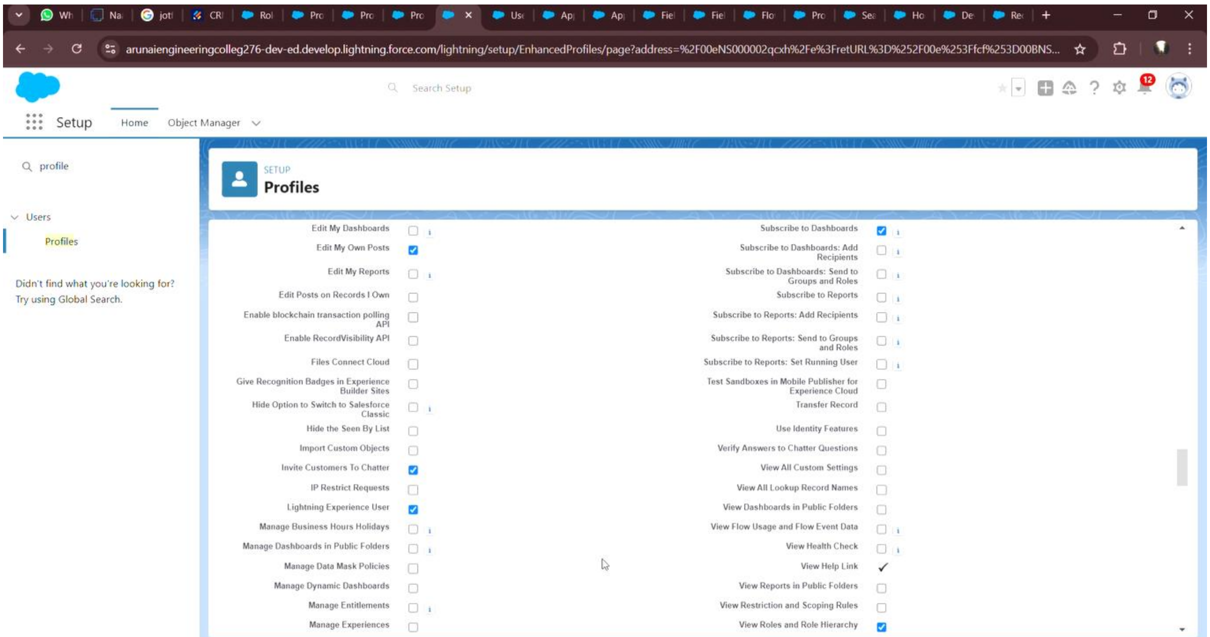


Manager:

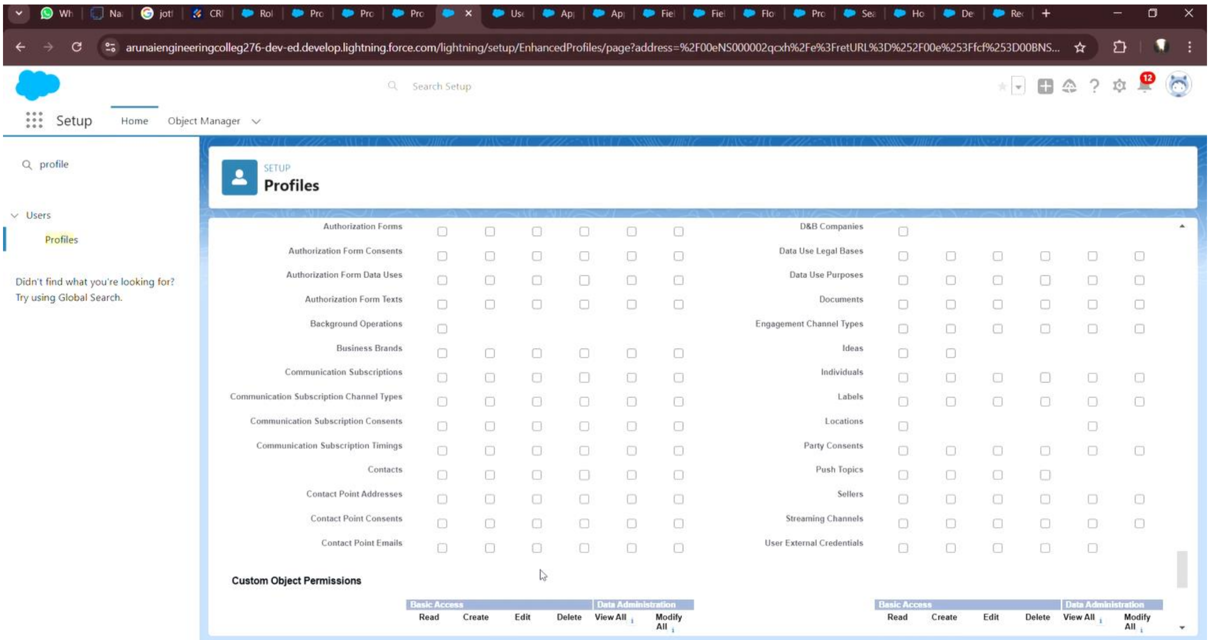


1.From Setup >> Go to Profiles and Clone Salesforce Platform User and Name it “Manager”.

2.Uncheck all the Custom Objects and Check only Property Details From Custom App Settings.



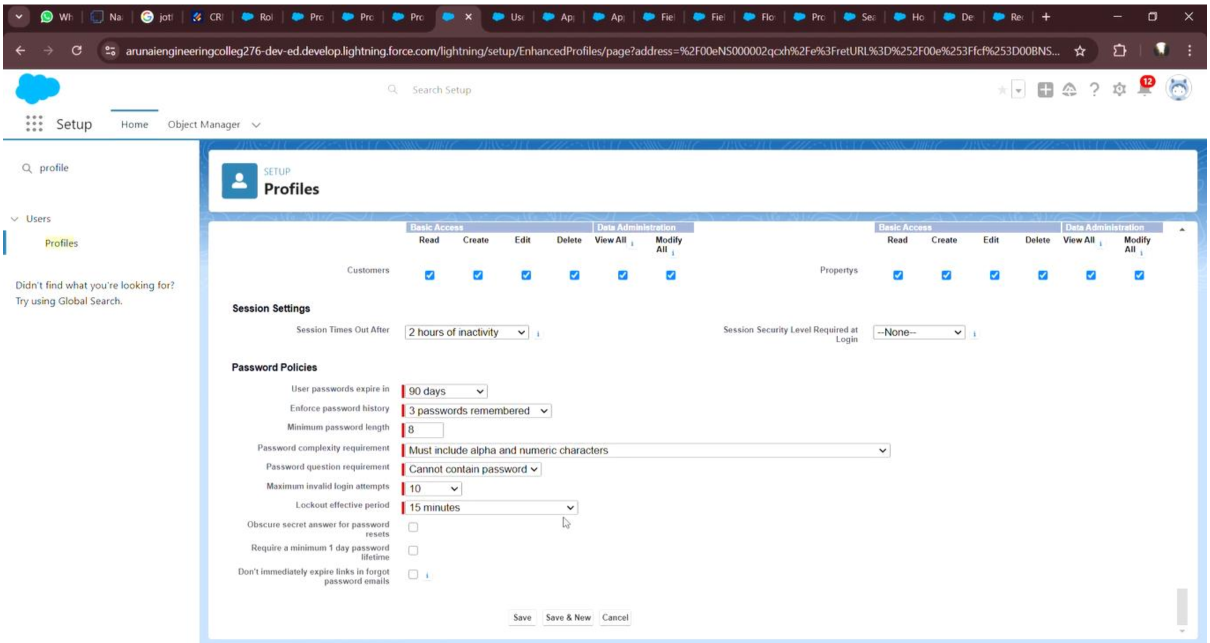
Create a Check Box field on user:



Create Field on the User as per the business requirement:

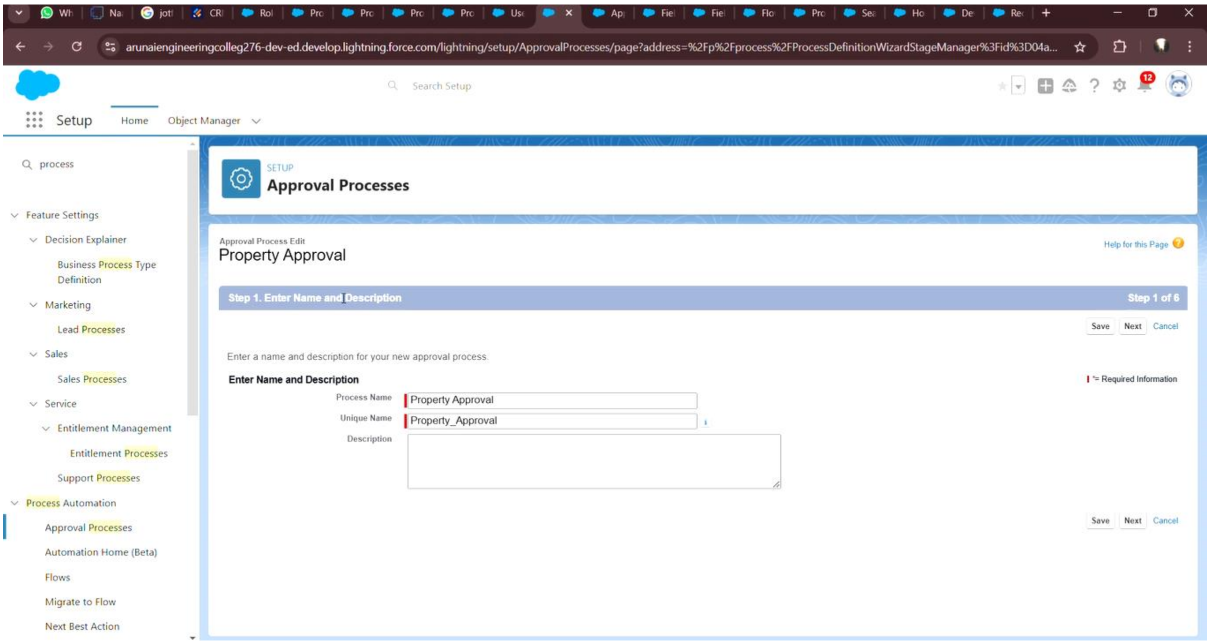
1.Setup >> Object Manager >> Search for User >> Fields and Relationships

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



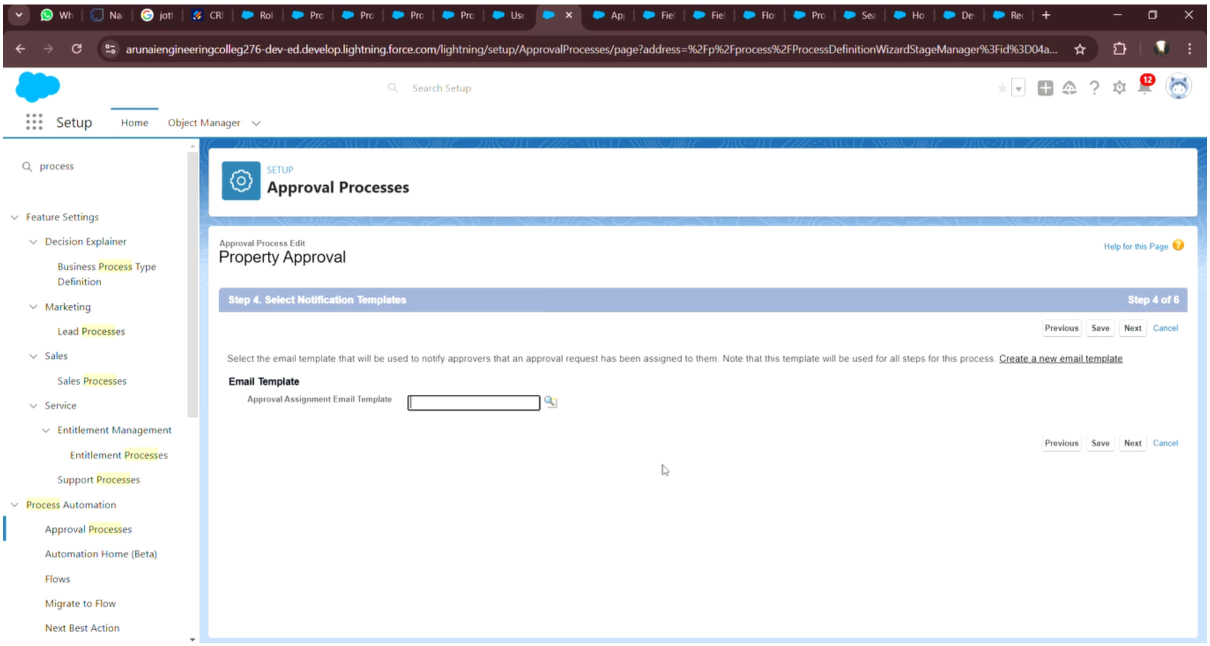
Create an Approval Process for Property Object:

An Approval process to approve or reject the records as according.

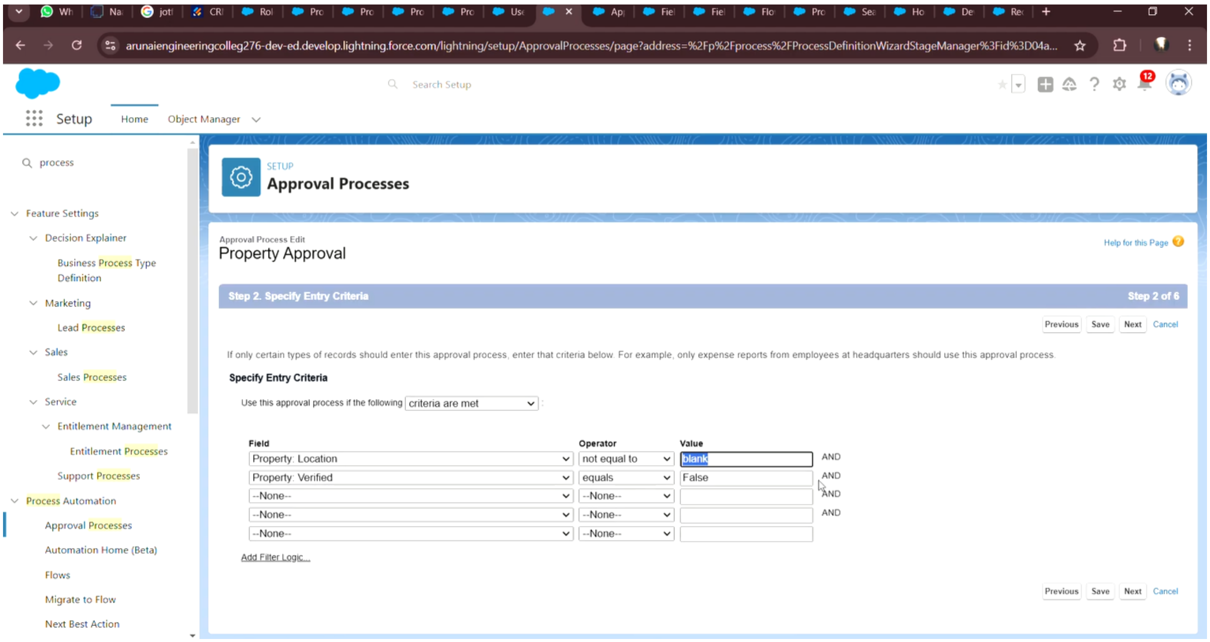


1.From Setup >> Process Automation >> Approval Process

2.Process Name - Property Approval.

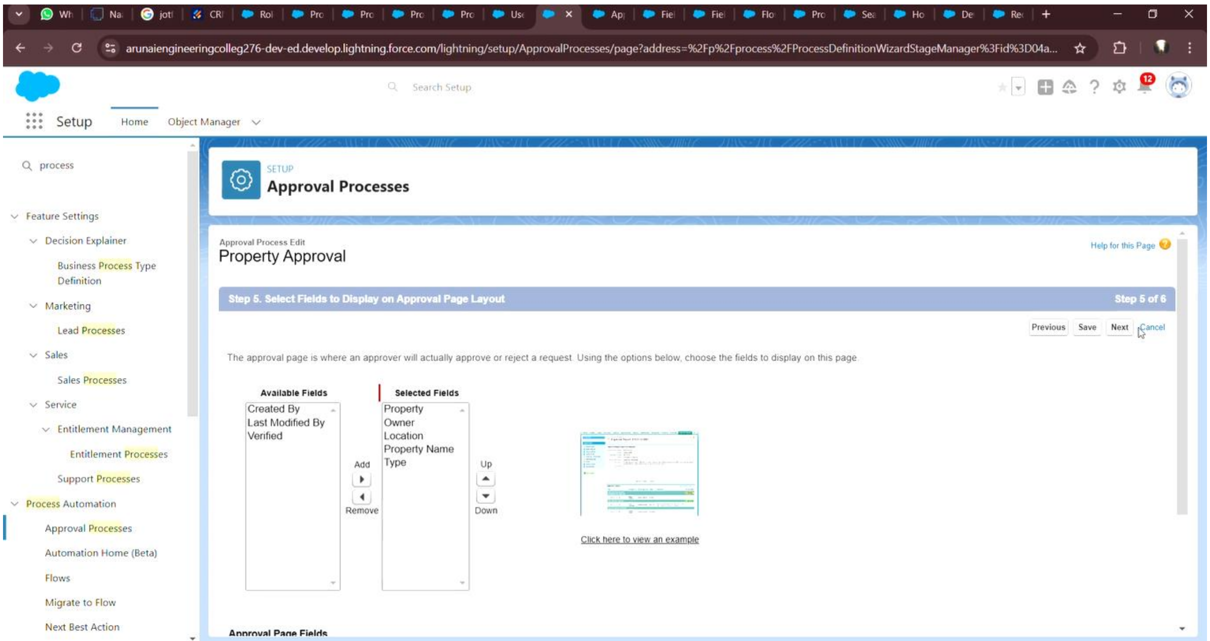


3.Give 2 criteria -
a. Location is not equal to blank,
b. Verified Equals false.



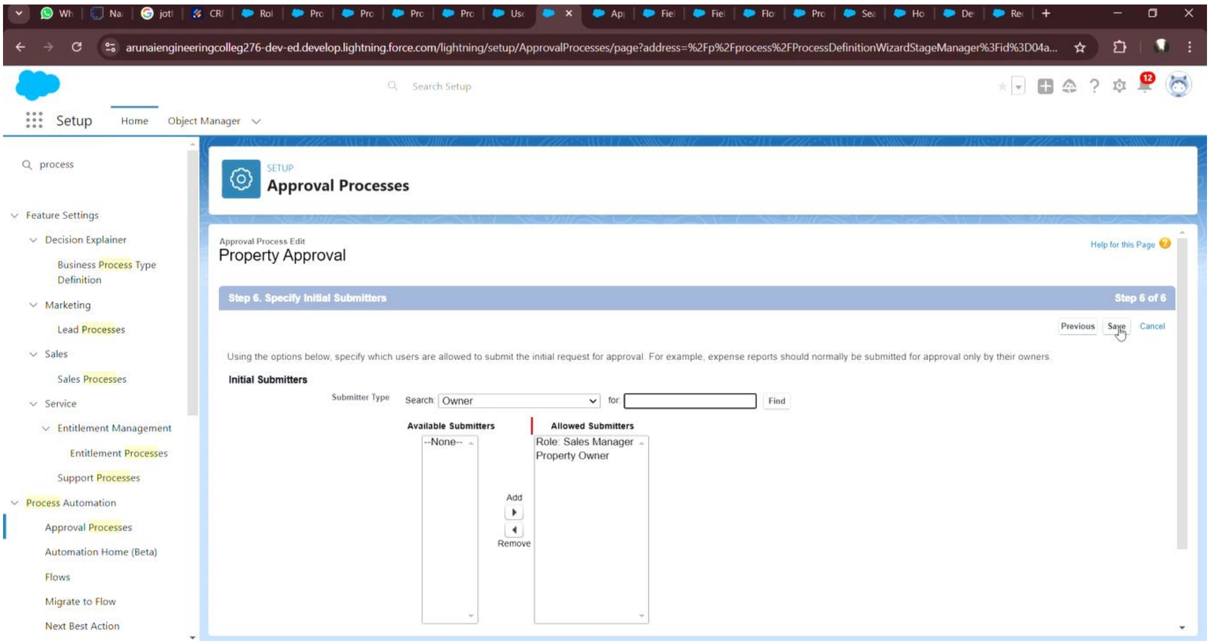
4) Click next and “Next Automated Approver Determined By” Select Manager

5) From Record Editability Properties >> Click on Administrators OR the currently assigned approver can edit records during the approval process.

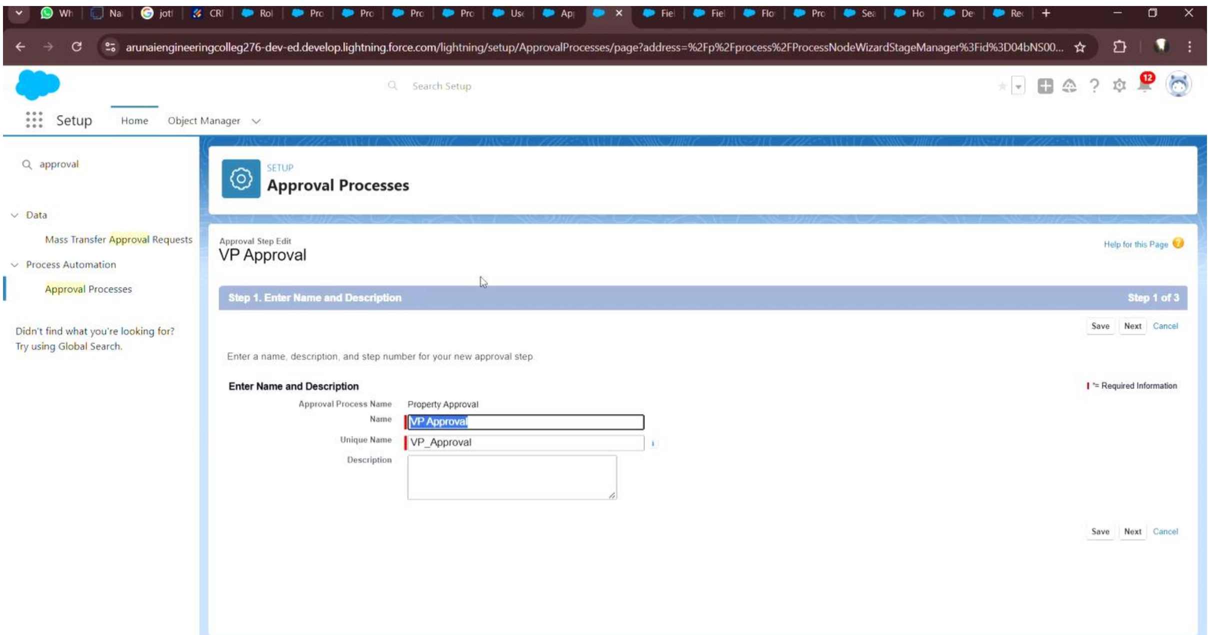


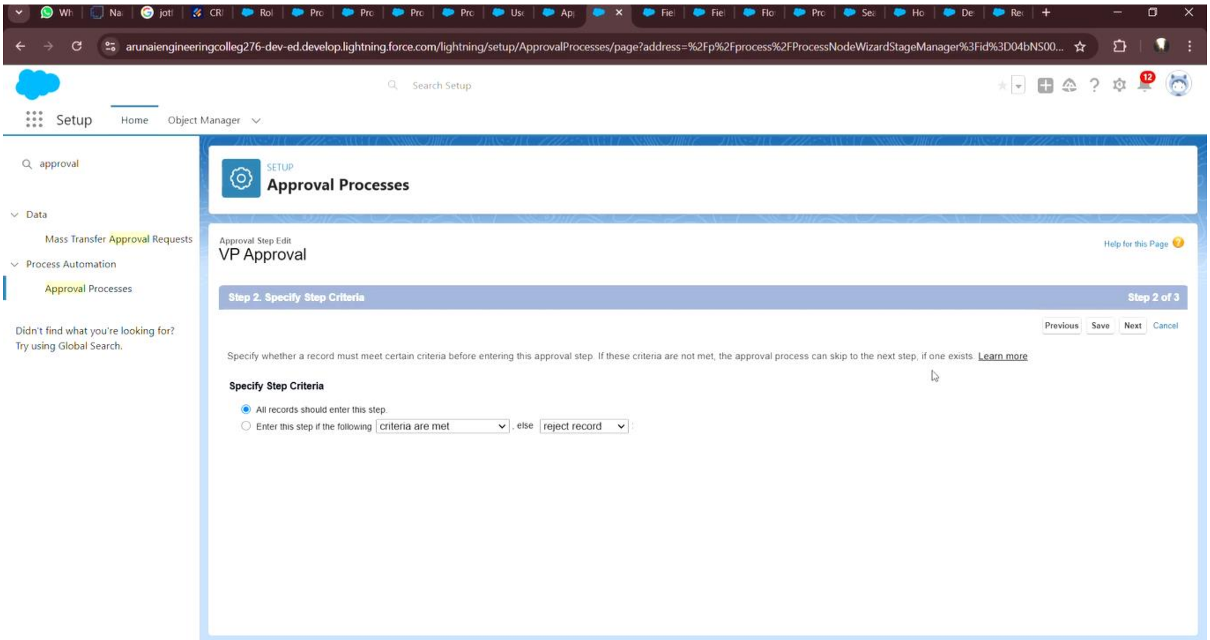
6) From Step 5. Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.

7) Click Next and Select the initial Submiters >>
a) Owner >> Property Owner
b) Roles >> Sales Manager
8) Save.
9) Add an approval step name “Executive Approval ”



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



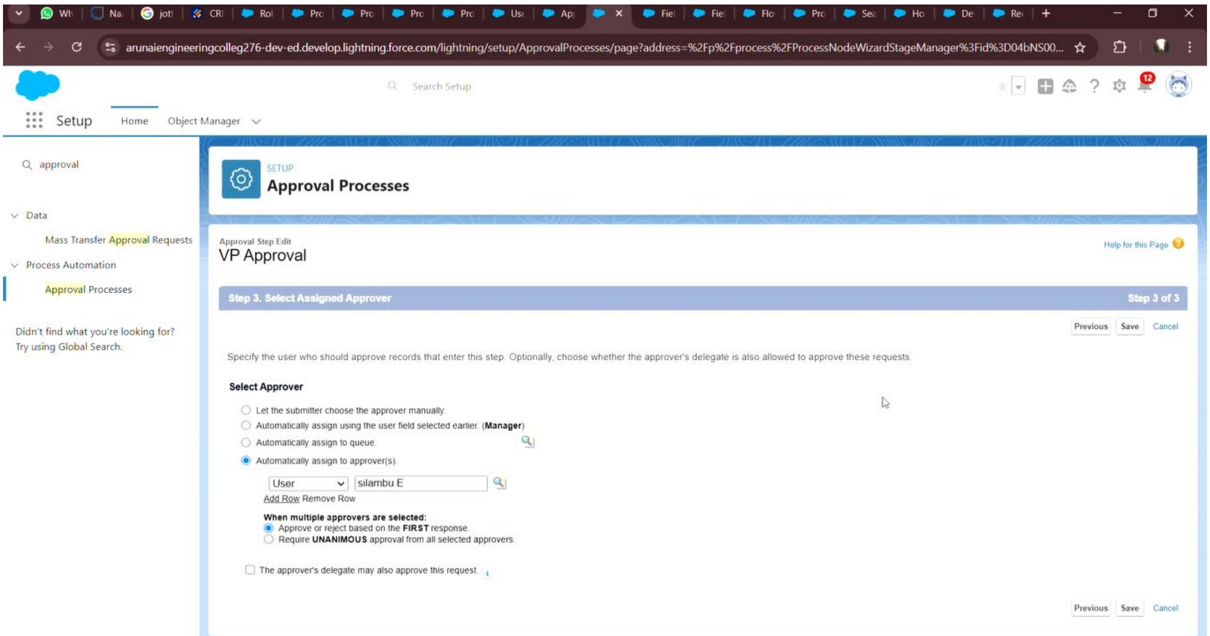


1.From Setup >> Search for Flows >> Click On New and Select “Record Trigger Flow”.

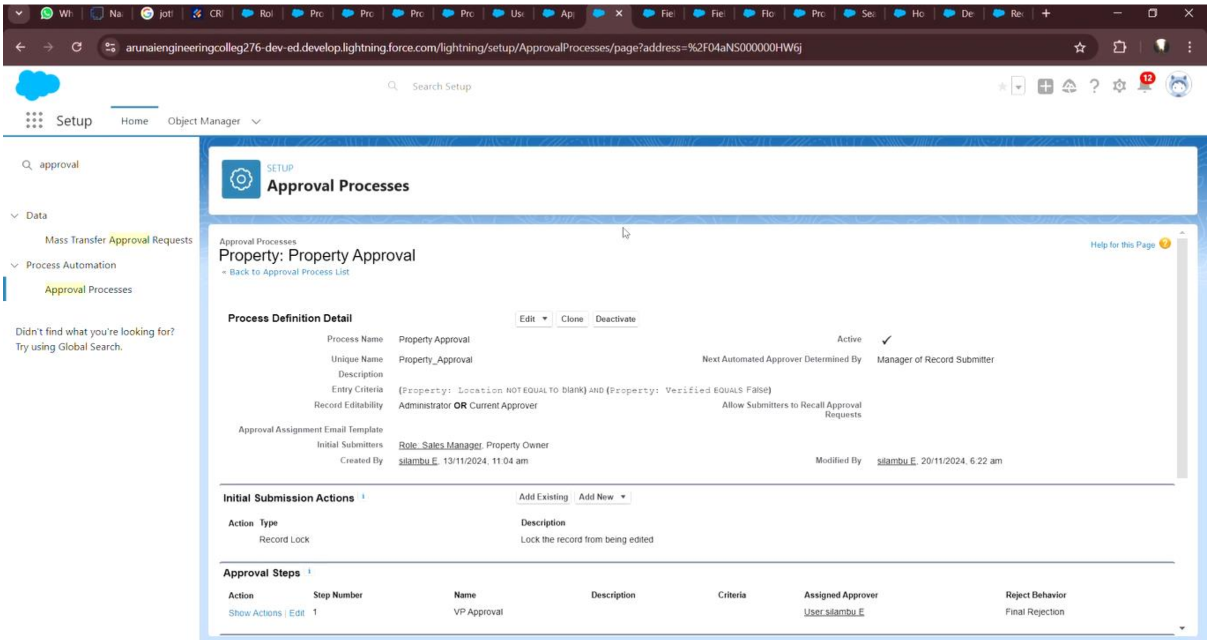
2.Select Object >> Property

3.Select “Trigger the flow when” >> “A record is created”

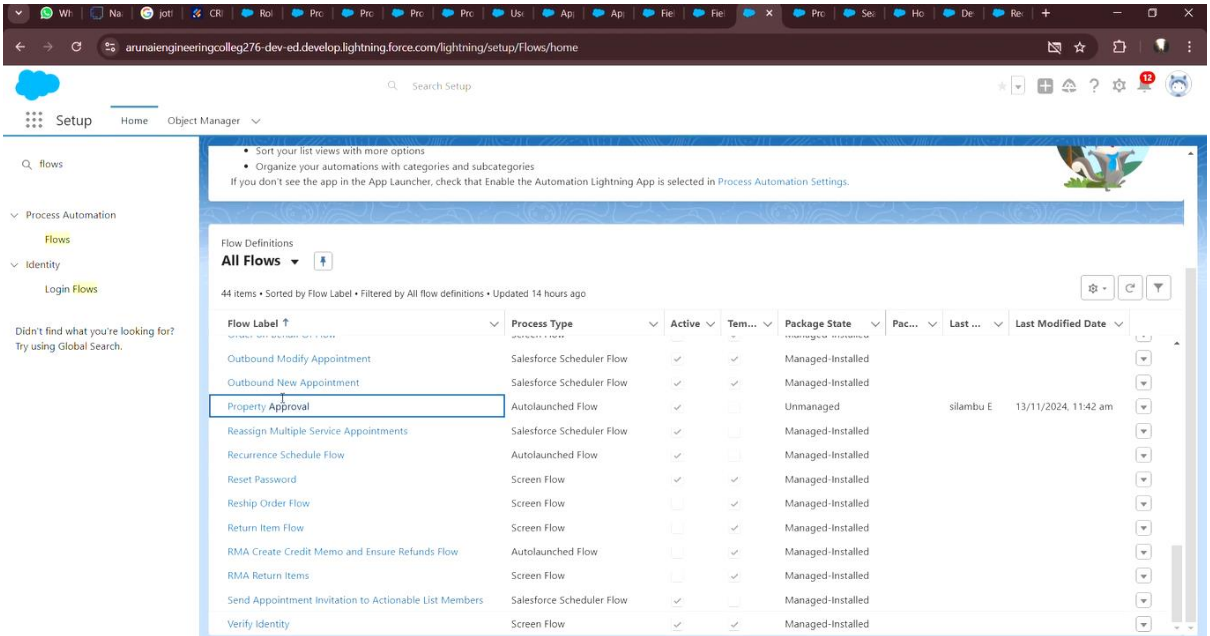
4.Set Entry Conditions >> “None”



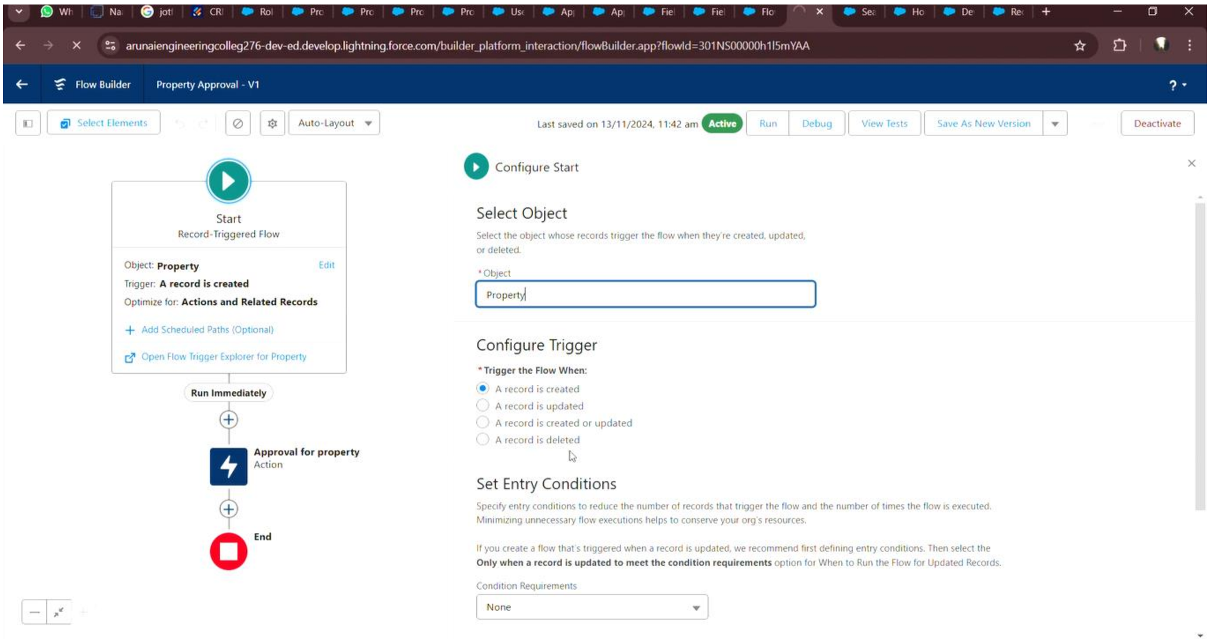
Create an App Page:



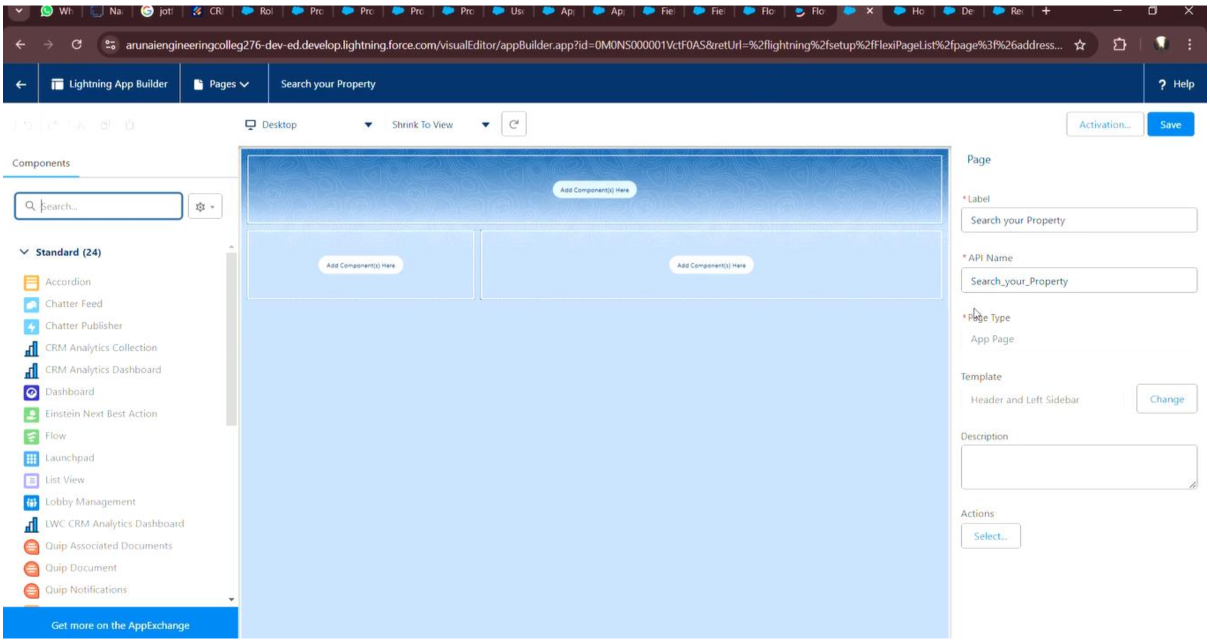
Create an App Page on the Property details Object named as “Search Your Property”:



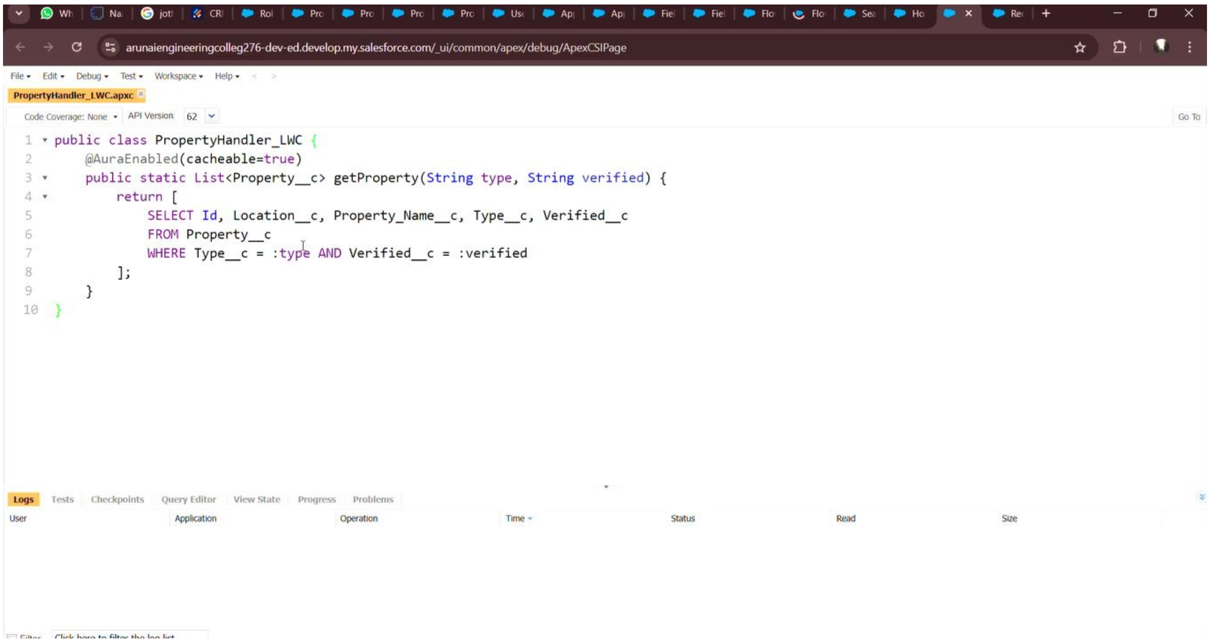
Create a LWC Component:



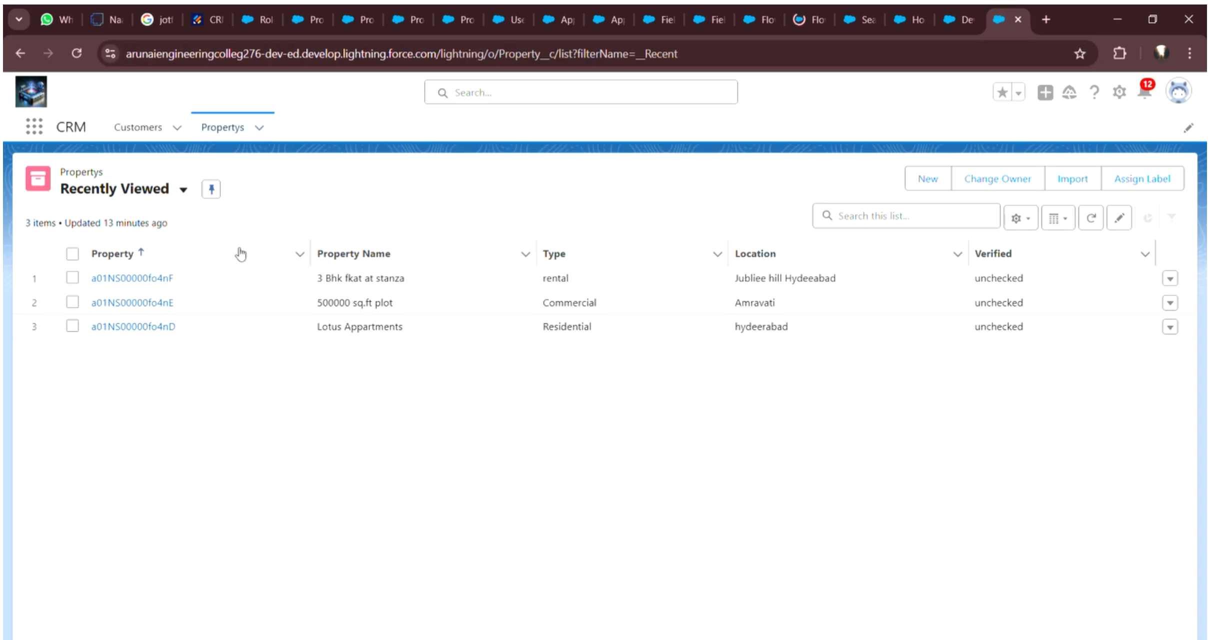
- Create an LWC Component for the customers so that only verified customers can access the verified properties and non Verified customers can access non verified properties, and deploy it on “Search your Property Page” :



1.Create an Apex Class and make it aura enabled and name it “PropertHandler_LWC”



Give Access of Apex Classes to Profiles:



1.From Setup >> Search For Apex Classes >> Click on “Security” behind “PropertyHandler__LWC”.

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