

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

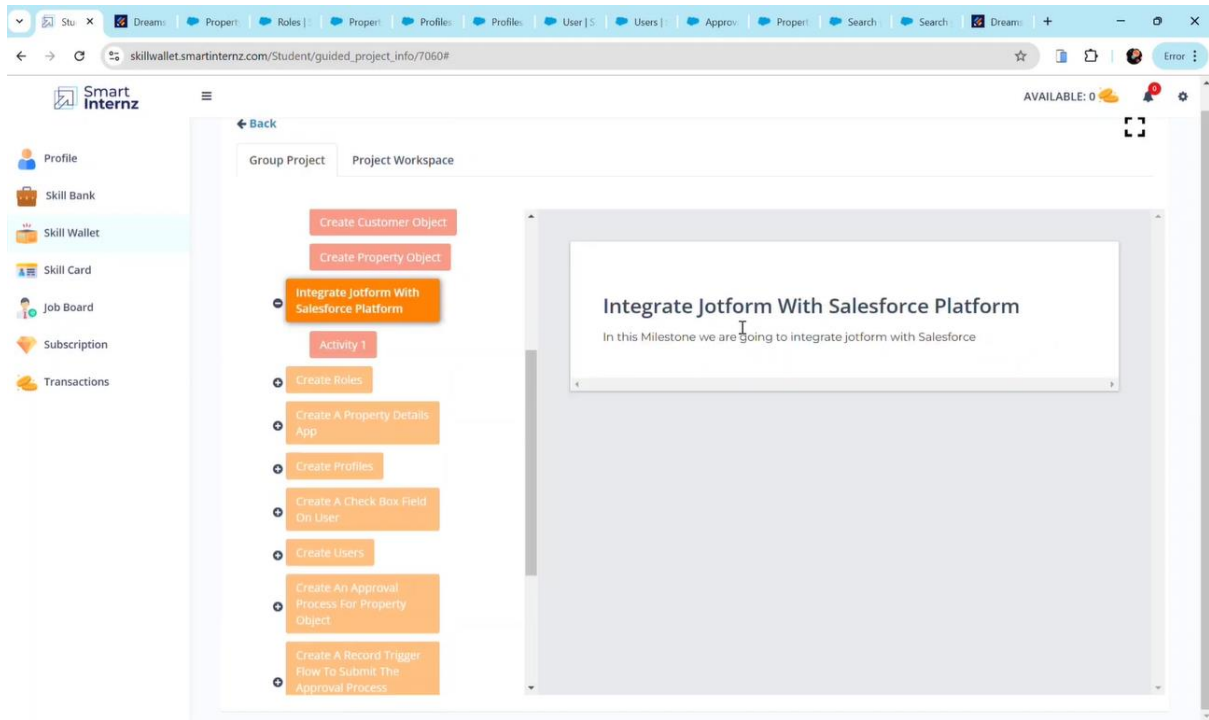
Roshan R-NM ID: 2879C2B299A9EFA8295447D47408E59E

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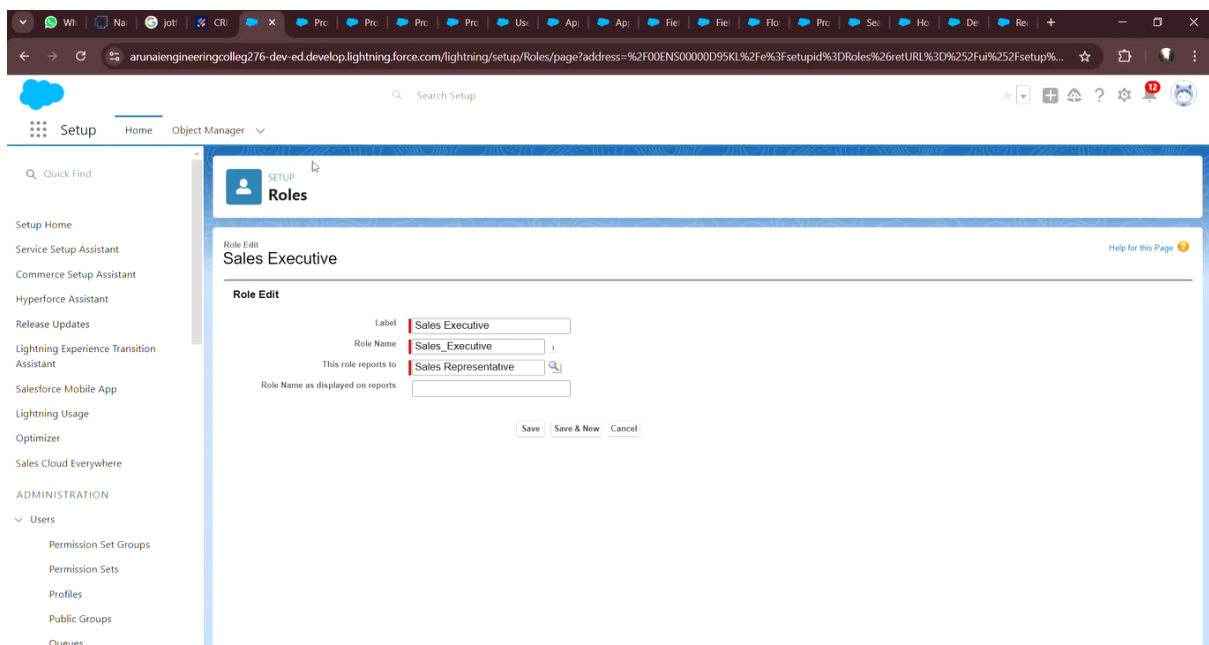
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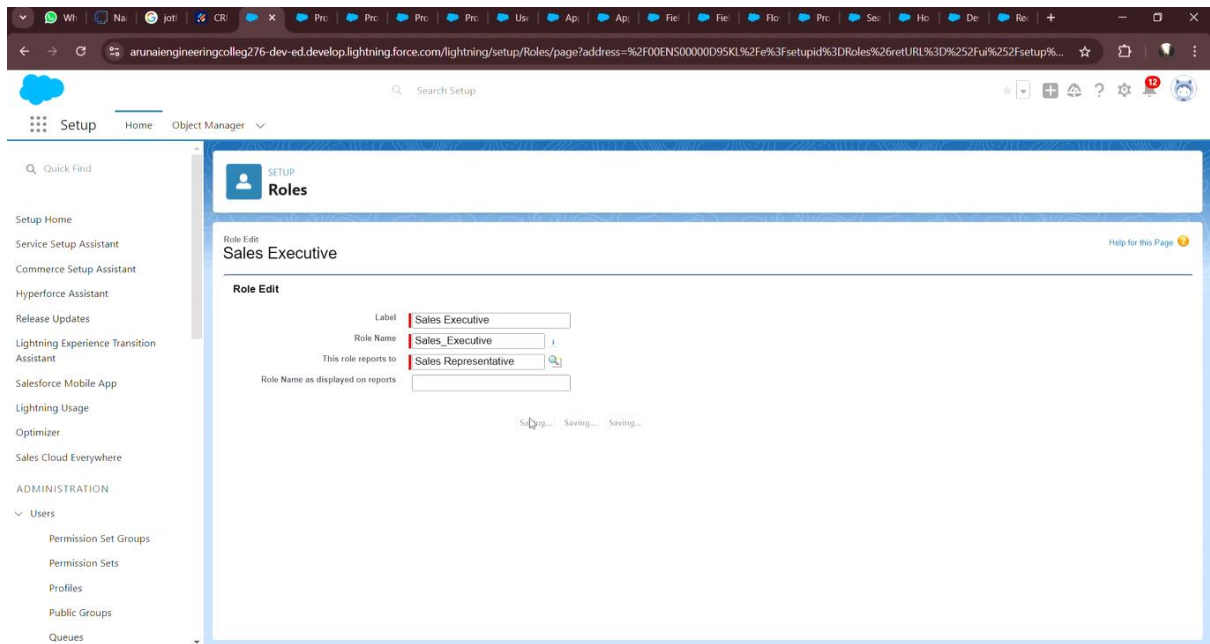
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Milestone 1 :- Create a Jot form and integrate it with the org to create a record of customers automatically.

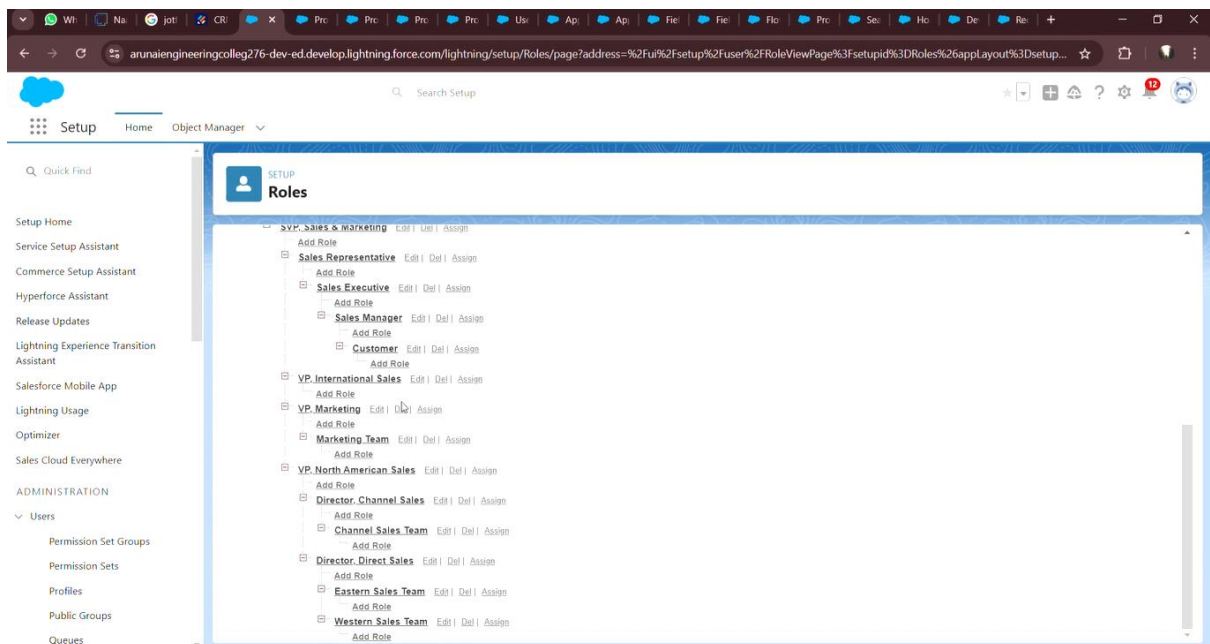


Create Roles:

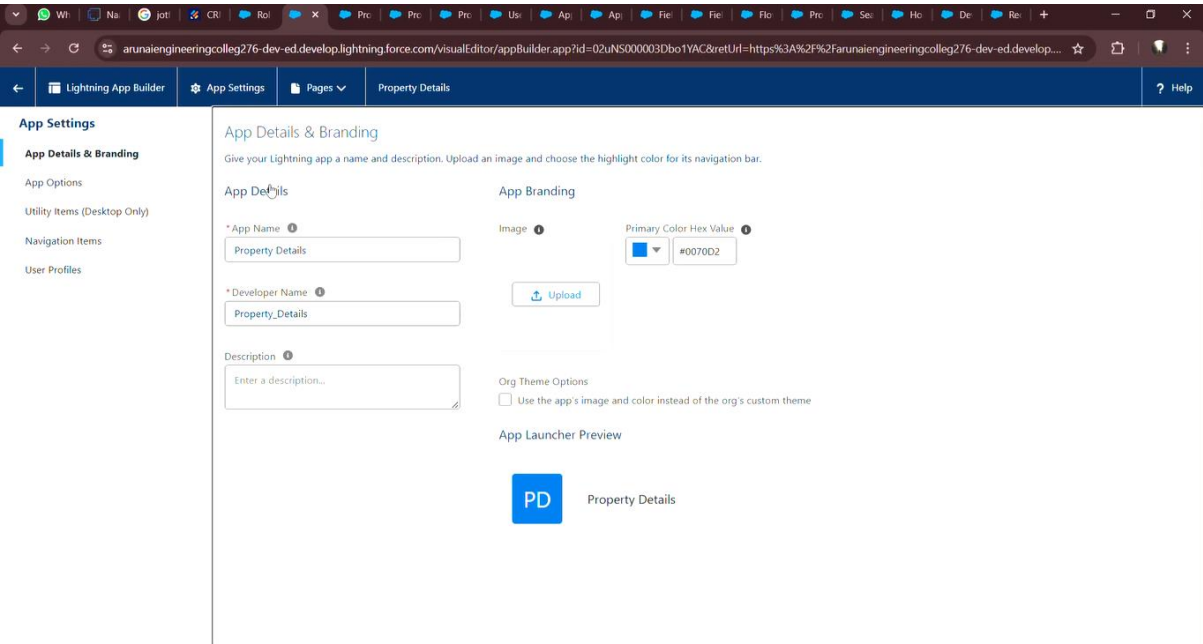




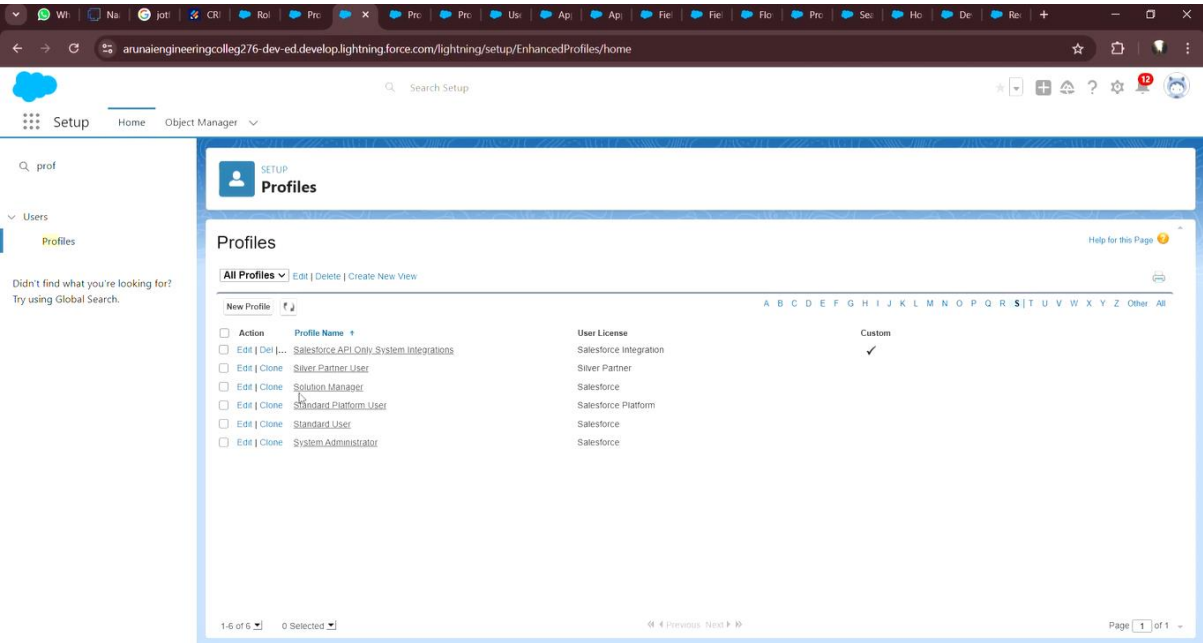
Create Roles as per business requirement :



Create a Property Details App:



Create Profiles:



Create profiles as per business requirement :

The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains navigation links for 'profiles', 'Users', and 'Profiles'. The main content area is titled 'SETUP Profiles' and includes a 'Manage Articles' section. Below this, the 'Standard Object Permissions' section is displayed, which contains two tables of permissions for various objects. The first table lists objects like Accounts, Addresses, Assets, Authorization Forms, Authorization Form Consents, Authorization Form Data Uses, Authorization Form Texts, Background Operations, Business Brands, Communication Subscriptions, Communication Subscription Channel Types, and Communication Subscription Consents. The second table lists objects like Contact Point Phones, Contact Point Type Consents, Customers, D&B Companies, Data Use Legal Bases, Data Use Purposes, Documents, Engagement Channel Types, Ideas, Individuals, Labels, and Locations. Each table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All).

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Data Uses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Texts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Contact Point Phones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Type Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D&B Companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Legal Bases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Purposes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Customer:

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

The screenshot shows the Salesforce Setup interface for the 'Profiles' page, specifically the 'Custom Object Permissions' section. The left sidebar contains navigation links for 'profiles', 'Users', and 'Profiles'. The main content area is titled 'SETUP Profiles' and includes a 'Custom Object Permissions' section. Below this, the 'Session Settings' section is displayed, which contains various settings for session management and password policies. The 'Session Settings' section includes a 'Session Times Out After' dropdown set to '2 hours of inactivity', a 'Session Security Level Required at Login' dropdown set to '--None--', and a 'Password Policies' section. The 'Password Policies' section includes a 'User passwords expire in' dropdown set to '90 days', an 'Enforce password history' dropdown set to '3 passwords remembered', a 'Minimum password length' input field set to '8', a 'Password complexity requirement' dropdown set to 'Must include alpha and numeric characters', a 'Password question requirement' dropdown set to 'Cannot contain password', a 'Maximum invalid login attempts' dropdown set to '10', a 'Lockout effective period' dropdown set to '15 minutes', and checkboxes for 'Obscure secret answer for password resets', 'Require a minimum 1 day password lifetime', and 'Don't immediately expire links in forgot password emails'.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

The screenshot displays the Salesforce Setup interface for editing a profile. The breadcrumb trail is Setup > Profiles. The main heading is 'Profiles'. Below this, there's a sub-heading 'Profile Edit' and a button 'Manager'. A message states: 'Set the permissions and page layouts for this profile'. The 'Profile Edit' form includes fields for Name (Manager), User License (Salesforce Platform), and Description. To the right of the Description field is a 'Custom Profile' checkbox, which is checked. Below the form, there are sections for 'Custom App Settings' and 'Service Provider Access'. The 'Custom App Settings' section shows a table with columns for 'Visible' and 'Default' for various apps. The 'Service Provider Access' section shows a table with columns for 'Visible' and 'Default' for various service providers. The 'Tab Settings' section shows a checkbox for 'Override users' personal tab customizations'.

Profiles

Profile Edit

Manager

Set the permissions and page layouts for this profile

Profile Edit Save Save & New Cancel

Name

User License Salesforce Platform

Description

Custom Profile ☒

Custom App Settings

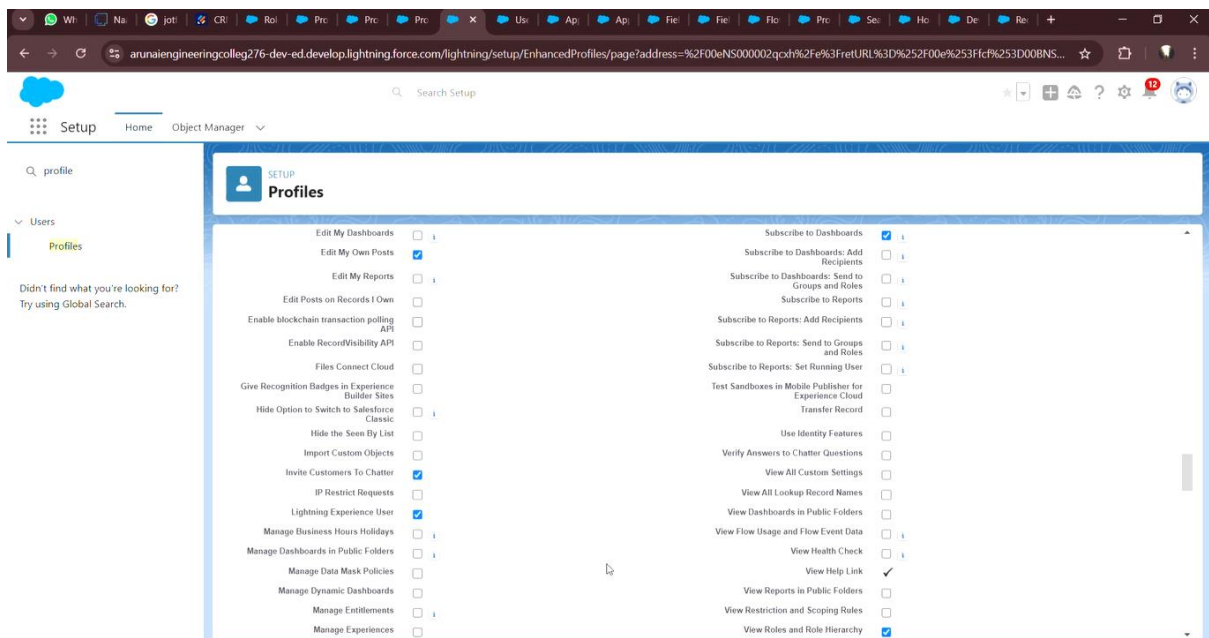
	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	Property Details (Property_Details)	<input checked="" type="checkbox"/>	<input type="radio"/>
CRM (CRM)	<input checked="" type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

☐ Override users' personal tab customizations

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



Create a Check Box field on user:

Setup Home Object Manager

Search Setup

profile

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

Authorization Forms

Authorization Form Consents

Authorization Form Data Uses

Authorization Form Texts

Background Operations

Business Brands

Communication Subscriptions

Communication Subscription Channel Types

Communication Subscription Consents

Communication Subscription Timings

Contacts

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Custom Object Permissions

D&B Companies

Data Use Legal Bases

Data Use Purposes

Documents

Engagement Channel Types

Ideas

Individuals

Labels

Locations

Party Consents

Push Topics

Sellers

Streaming Channels

User External Credentials

Basic Access

Read Create Edit Delete

Data Administration

View All Modify All

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”

Setup Home Object Manager

Search Setup

profile

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

Customers

Properties

Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

--None--

Password Policies

User passwords expire in

90 days

Enforce password history

3 passwords remembered

Minimum password length

8

Password complexity requirement

Must include alpha and numeric characters

Password question requirement

Cannot contain password

Maximum invalid login attempts

10

Lockout effective period

15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save Save & New Cancel

Create an Approval Process for Property Object:

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

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu is expanded to 'Process Automation' > 'Approval Processes'. The main content area is titled 'Approval Processes' and 'Property Approval'. It shows 'Step 1. Enter Name and Description' of a 6-step wizard. The 'Process Name' is 'Property Approval' and the 'Unique Name' is 'Property_Approval'. The 'Description' field is empty. There are 'Save', 'Next', and 'Cancel' buttons at the bottom right.

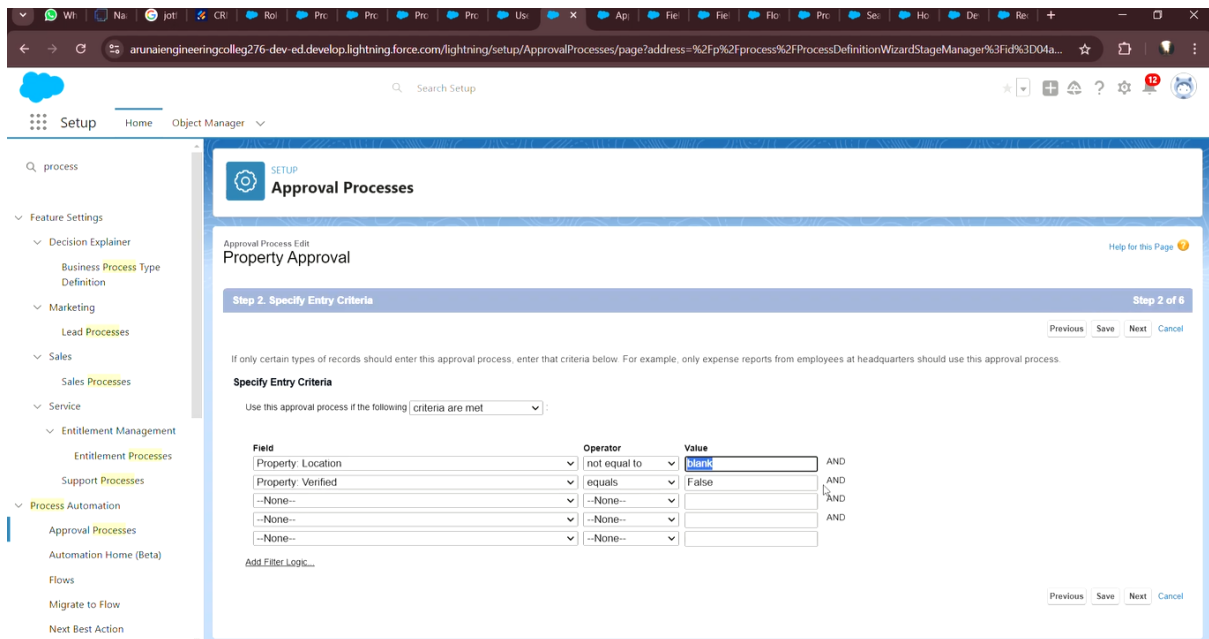
1.From Setup >> Process Automation >> Approval Process

2.Process Name - Property Approval.

The screenshot shows the next step in the Salesforce Setup interface, 'Step 4. Select Notification Templates'. It prompts the user to 'Select the email template that will be used to notify approvers that an approval request has been assigned to them'. There is a link to 'Create a new email template'. The 'Email Template' section shows 'Approval Assignment Email Template' with a search icon. There are 'Previous', 'Save', 'Next', and 'Cancel' buttons at the bottom right.

3. Give 2 criteria -

- a. Location is not equal to blank,
- b. Verified Equals false.



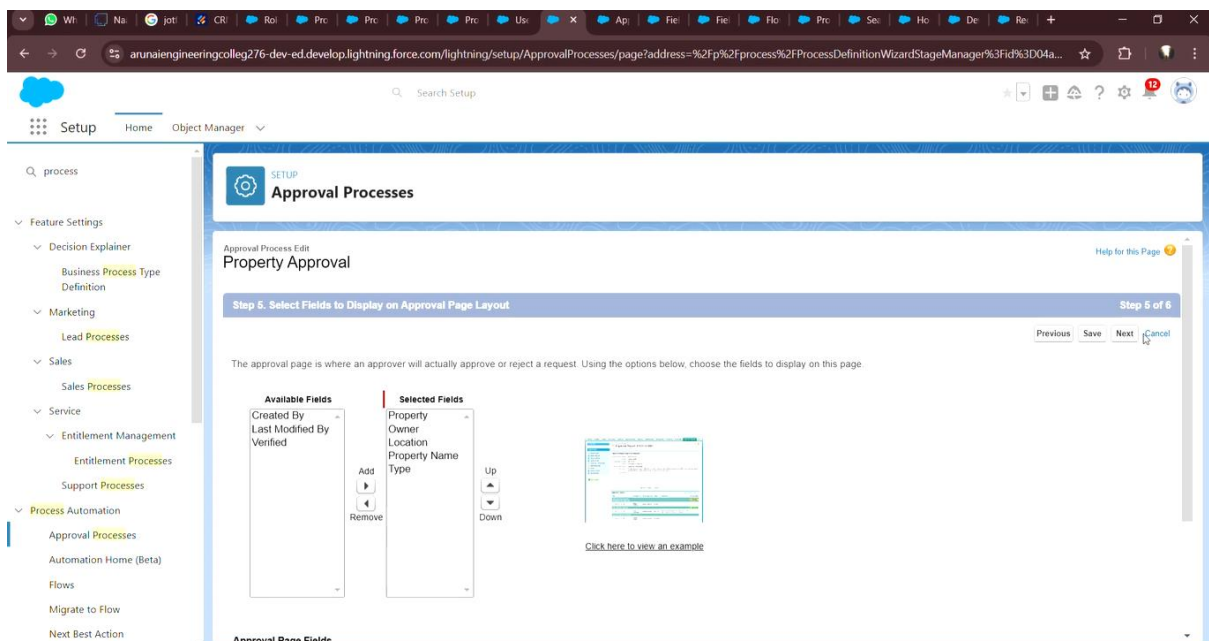
The screenshot shows the Salesforce Setup interface for configuring an Approval Process. The left sidebar contains a navigation menu with categories like Feature Settings, Marketing, Sales, Service, and Process Automation. The main content area is titled 'Approval Processes' and 'Property Approval'. It is at 'Step 2 of 6: Specify Entry Criteria'. The instructions state: '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.' There is a dropdown menu 'Specify Entry Criteria' with the value 'criteria are met'. Below this is a table for defining criteria:

Field	Operator	Value	
Property: Location	not equal to	Blank	AND
Property: Verified	equals	False	AND
--None--	--None--		AND
--None--	--None--		AND

Buttons at the bottom right include 'Previous', 'Save', 'Next', and 'Cancel'.

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

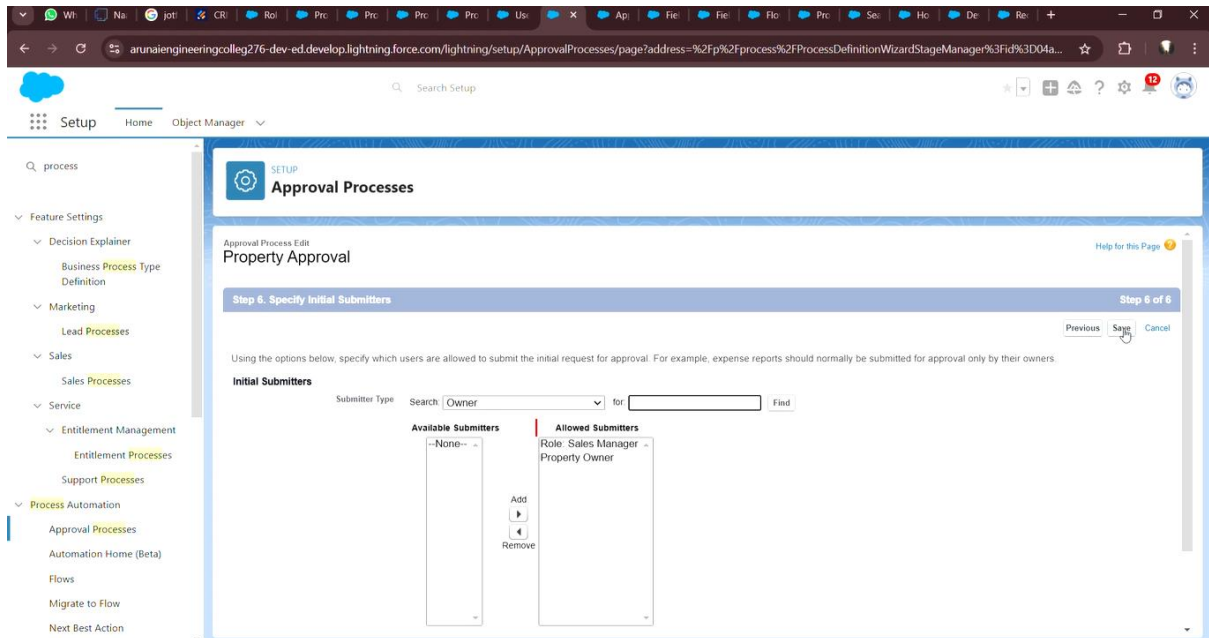
5) From Record Editability Properties >> Click on Administrators OR the currently assigned approver can edit records during the approval process.



The screenshot shows the Salesforce Setup interface for configuring an Approval Process. The left sidebar is the same as in the previous image. The main content area is titled 'Approval Processes' and 'Property Approval'. It is at 'Step 5 of 6: Select Fields to Display on Approval Page Layout'. The instructions state: '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.' There are two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes 'Created By', 'Last Modified By', and 'Verified'. The 'Selected Fields' list includes 'Property Owner', 'Location', 'Property Name', and 'Type'. There are 'Add', 'Remove', 'Up', and 'Down' buttons between the columns. A preview window shows a sample approval page layout. A link 'Click here to view an example' is present. Buttons at the bottom right include 'Previous', 'Save', 'Next', and 'Cancel'.

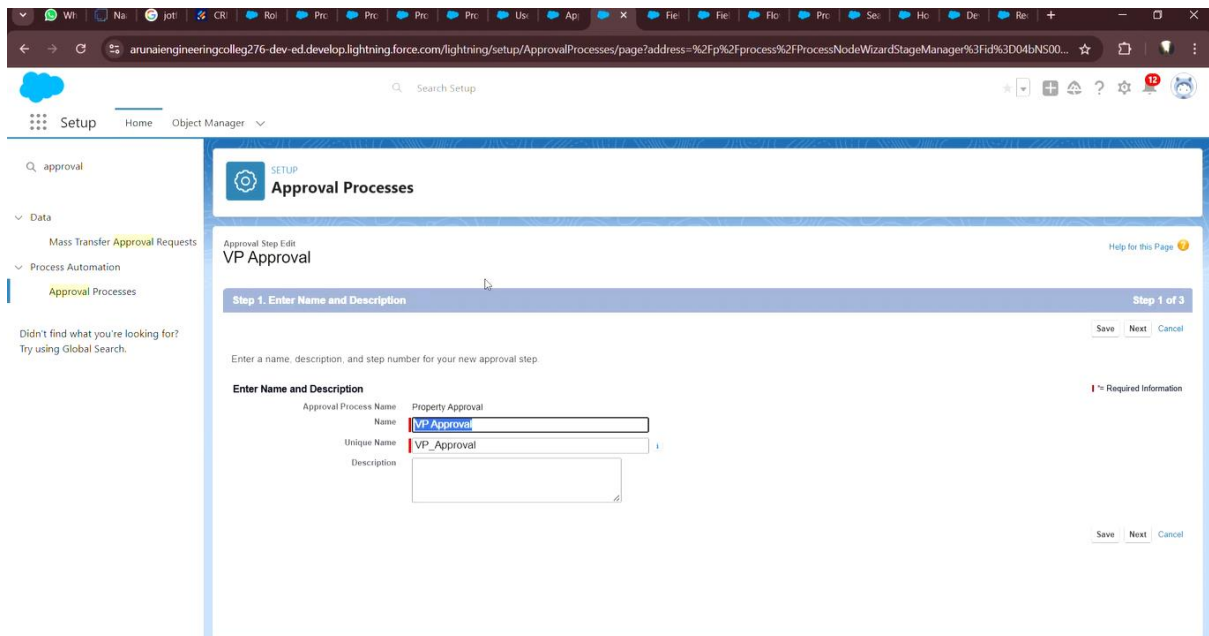
6) From Step 5. Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.

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

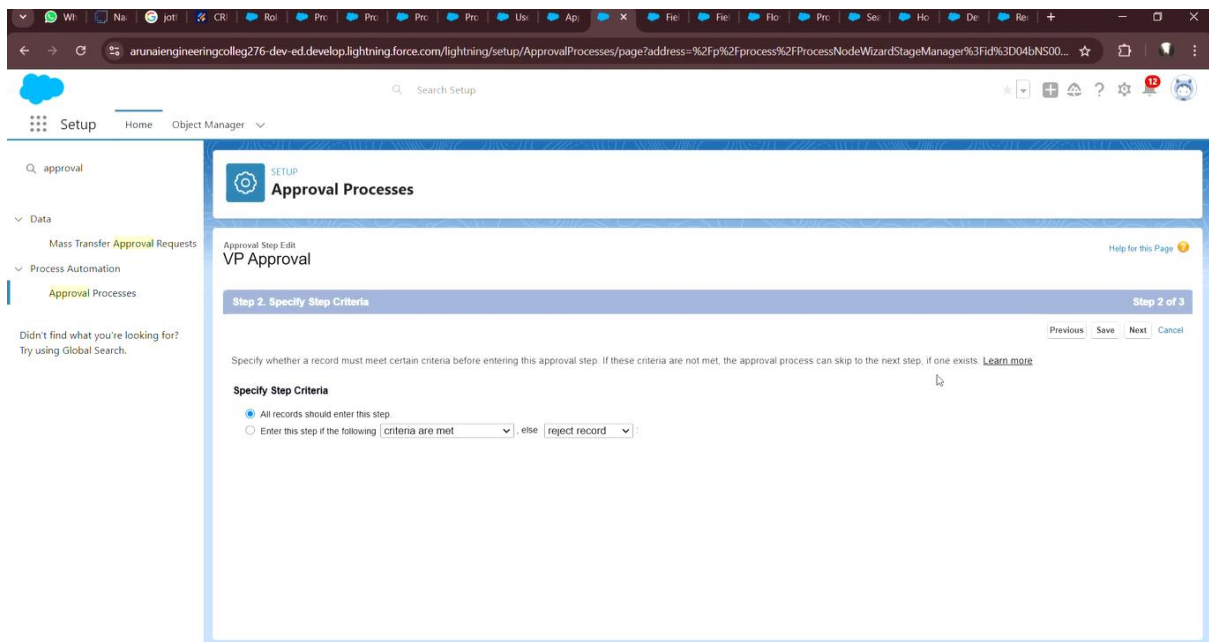


The screenshot shows the Salesforce Setup interface for editing an approval process. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Approval Processes' and 'Property Approval'. The current step is 'Step 6. Specify Initial Submitters'. Below the step title, there is a search bar for 'Initial Submitters' with a dropdown menu set to 'Owner'. To the right of the search bar is a 'Find' button. Below the search bar, there are two columns: 'Available Submitters' and 'Allowed Submitters'. The 'Available Submitters' column contains a dropdown menu with '--None--'. The 'Allowed Submitters' column contains a list of roles: 'Role: Sales Manager' and 'Property Owner'. Between the two columns are 'Add' and 'Remove' buttons. At the top right of the step, there are 'Previous', 'Save', and 'Cancel' buttons. The 'Save' button is highlighted.

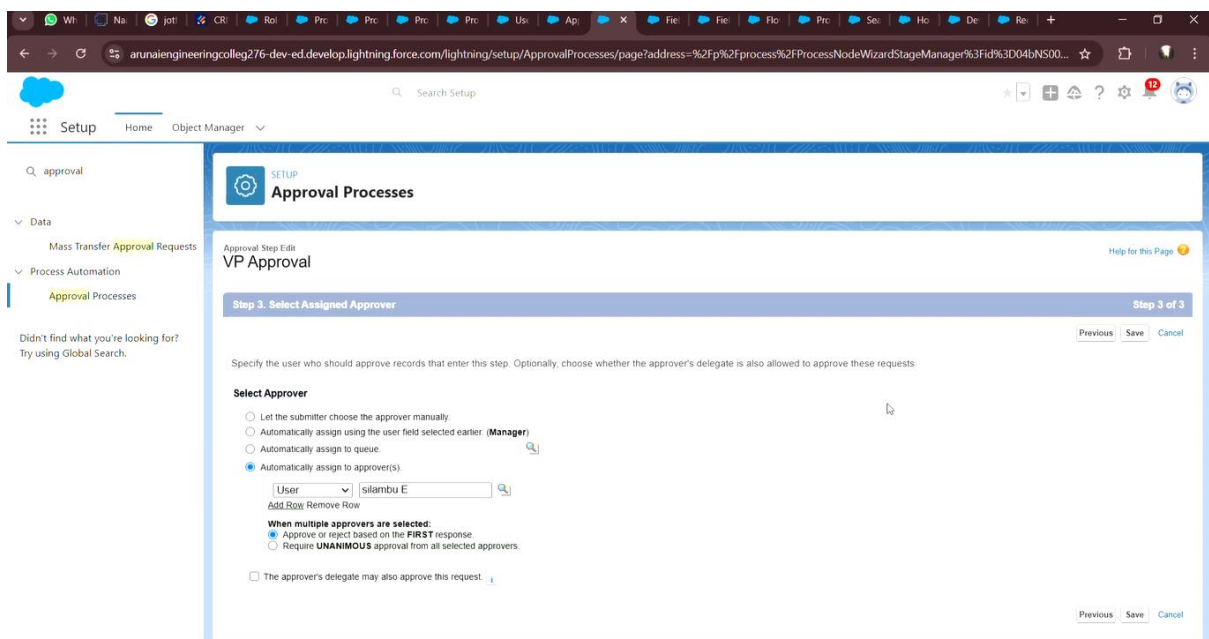
Create a Record trigger flow to submit the Approval Process Automatically:



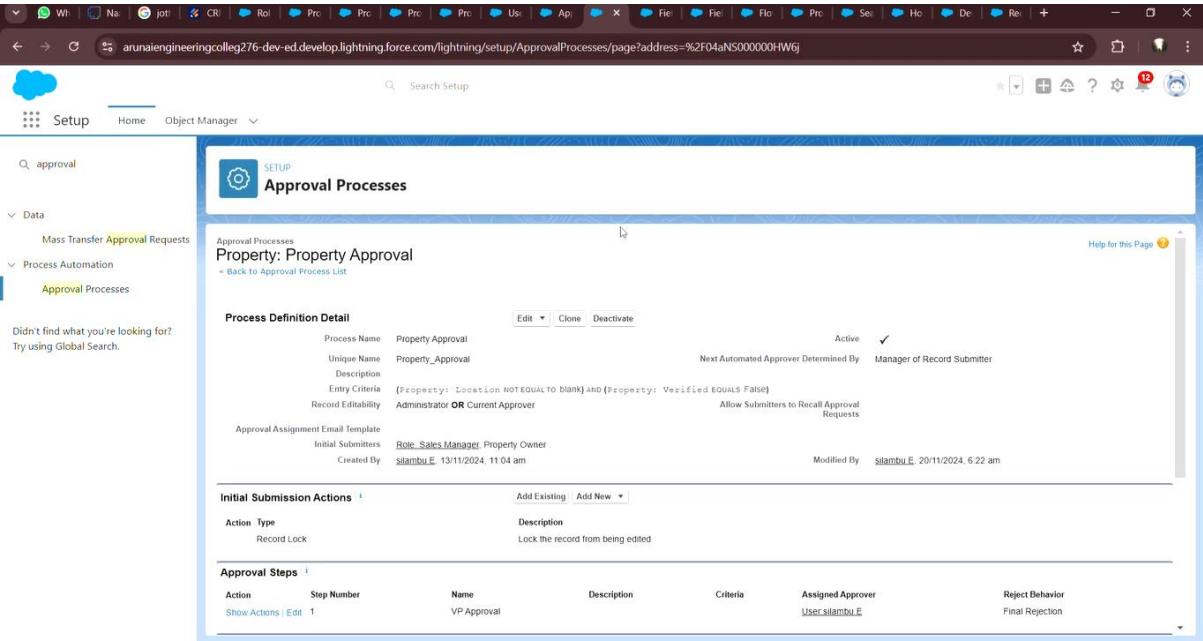
The screenshot shows the Salesforce Setup interface for creating a new approval step. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Approval Processes' and 'VP Approval'. The current step is 'Step 1. Enter Name and Description'. Below the step title, there is a text input field for 'Enter a name, description, and step number for your new approval step.' Below this, there is a section titled 'Enter Name and Description' with three fields: 'Approval Process Name' (containing 'Property Approval'), 'Name' (containing 'VP Approval'), and 'Unique Name' (containing 'VP_Approval'). There is also a 'Description' field. At the top right of the step, there are 'Save', 'Next', and 'Cancel' buttons. The 'Next' button is highlighted.



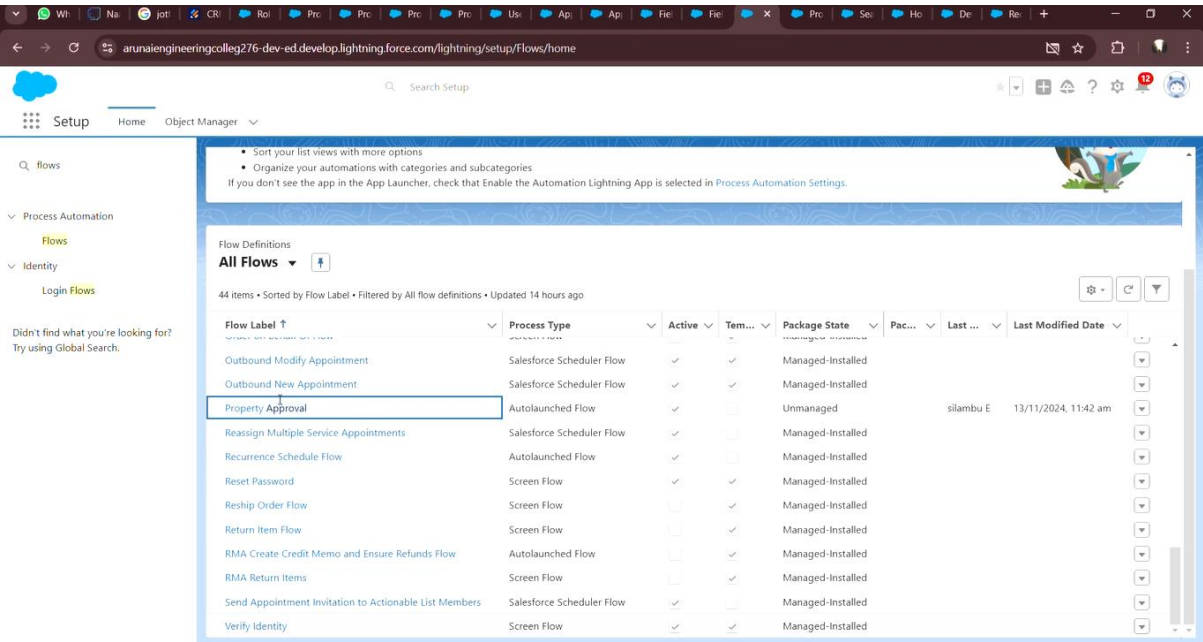
- 1.From Setup >> Search for Flows >> Click On New and Select “Record Trigger Flow”.
- 2.Select Object >> Property
- 3.Select “Trigger the flow when” >> “A record is created”
- 4.Set Entry Conditions >> “None”



Create an App Page:



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



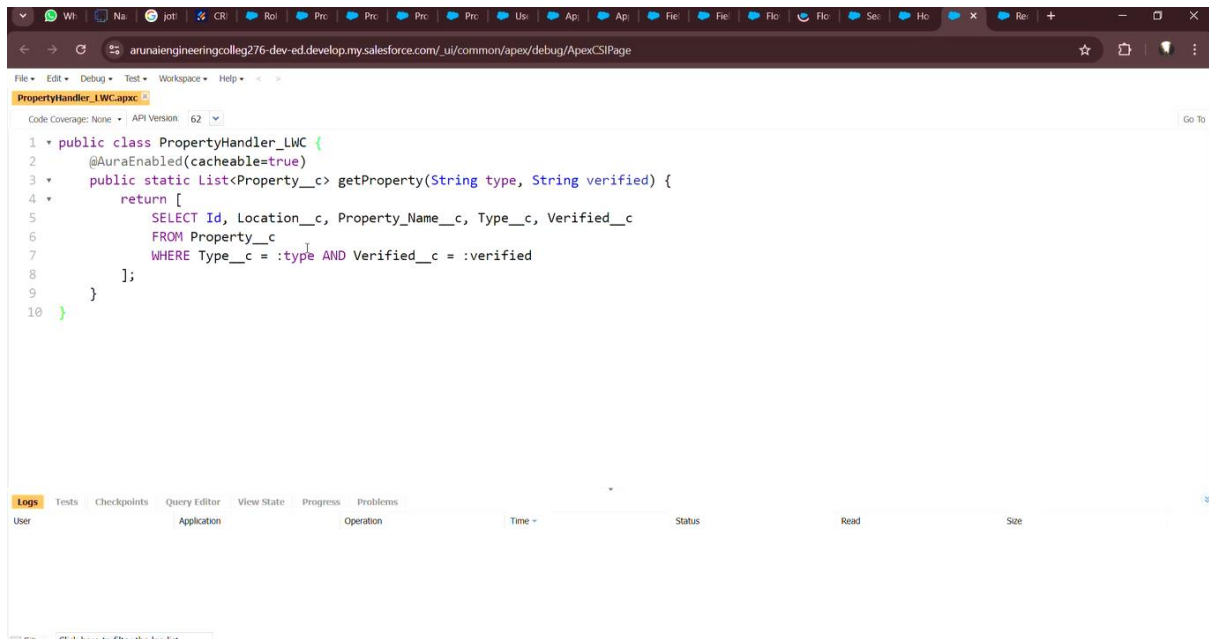
Create a LWC Component:

The screenshot shows the Salesforce Flow Builder interface for a flow named 'Property Approval - V1'. The flow diagram on the left consists of a 'Start' node (Record-Triggered Flow), a 'Run Immediately' node, an 'Approval for property' action, and an 'End' node. The 'Configure Start' panel on the right is open, showing the 'Select Object' as 'Property' and the 'Configure Trigger' as 'A record is created'. The 'Set Entry Conditions' section is also visible, with a 'Condition Requirements' dropdown set to 'None'.

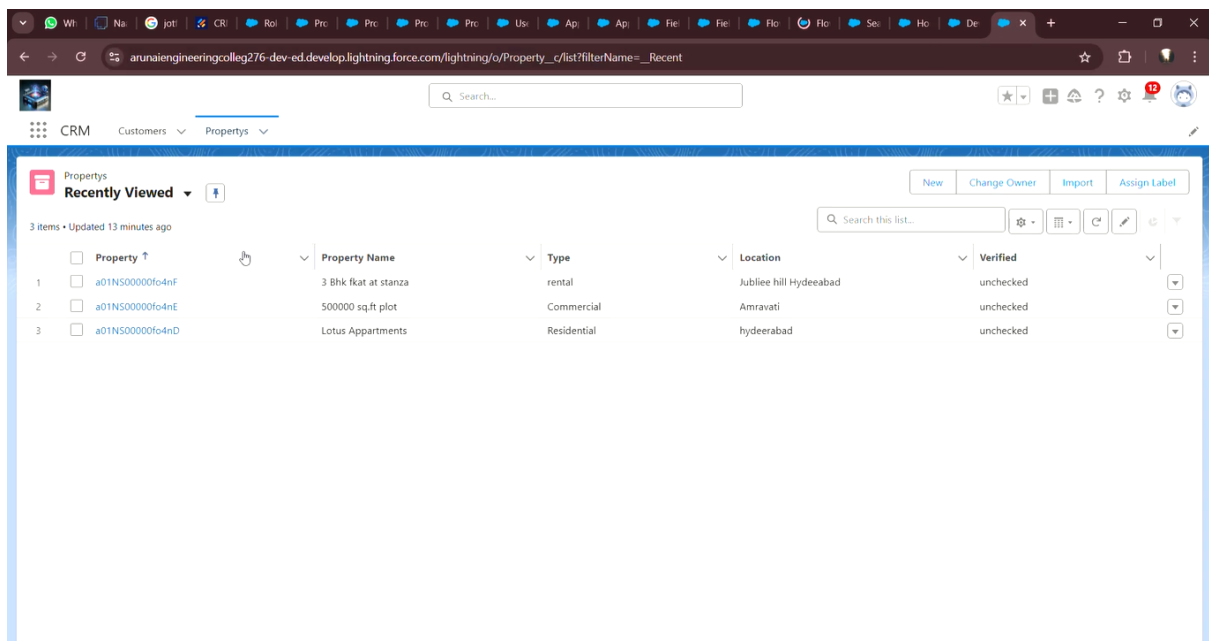
- Create an LWC Component for the customers so that only verified customers can access the verified properties and non Verified customers can access non verified properties, and deploy it on “Search your Property Page” :

The screenshot shows the Salesforce Lightning App Builder interface for a page named 'Search your Property'. The page layout includes a header, a search bar, and a main content area. The 'Components' panel on the left shows a list of standard components, and the 'Page' panel on the right shows the page configuration, including the label 'Search your Property' and the API name 'Search_your_Property'.

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”.