

A CRM APPLICATION TO HANDLE THE CLIENTS AND THEIR PROPERTY RELATED REQUIREMENTS

1. Project Overview

The Salesforce CRM system for Dreams World Properties is a transformative solution aimed at improving how real estate businesses manage customer interactions and property-related transactions. In the fast-paced real estate market, the ability to respond quickly to customer inquiries, provide personalized property recommendations, and maintain accurate records is crucial for success. This project leverages the robust capabilities of Salesforce to automate processes, reduce administrative overhead, and improve overall customer satisfaction.

The integration of Jotform with Salesforce enables seamless data collection from customers visiting the company's website. This not only eliminates manual data entry but also ensures accuracy and efficiency in record creation. Salesforce categorizes users into verified and non-verified customers, offering tailored property listings to meet specific needs. This enhances user experience by ensuring that customers see properties relevant to their preferences and eligibility.

Additionally, advanced features such as role-based access, approval workflows, and dynamic Lightning Web Components (LWC) make this system a comprehensive tool for managing customer and property data. With this CRM, Dreams World Properties aims to achieve operational excellence and solidify its position as a leader in the real estate market.

2. Objectives

The Salesforce CRM project is designed to achieve several specific goals that directly impact the efficiency and effectiveness of real estate operations:

- **Automated Data Entry:** Integrate Jotform to create customer records automatically in Salesforce, reducing manual effort and improving data accuracy.
- **Customer Categorization:** Establish a verification system to distinguish between approved and non-approved customers, ensuring that users receive appropriate property recommendations.
- **Property Management:** Develop a structured Property object within Salesforce to handle data such as property type, location, and availability.
- **Streamlined Approvals:** Create a multi-level approval process for property records, ensuring only verified properties are made visible to customers.
- **Interactive User Interface:** Build an LWC that enables customers to search for properties based on type and verification status, enhancing user engagement.
- **Secure Role-Based Access:** Implement roles such as Sales Executive, Sales Manager, and Customer to control system access and functionality.
- **Operational Efficiency:** Optimize workflows to reduce delays and errors, ensuring faster decision-making and improved customer satisfaction.

By achieving these objectives, the system addresses critical challenges faced by real estate businesses and positions Dreams World Properties for sustainable growth.

3. Salesforce Key Features and Concepts Utilized

This project taps into the following core Salesforce functionalities:

Integration

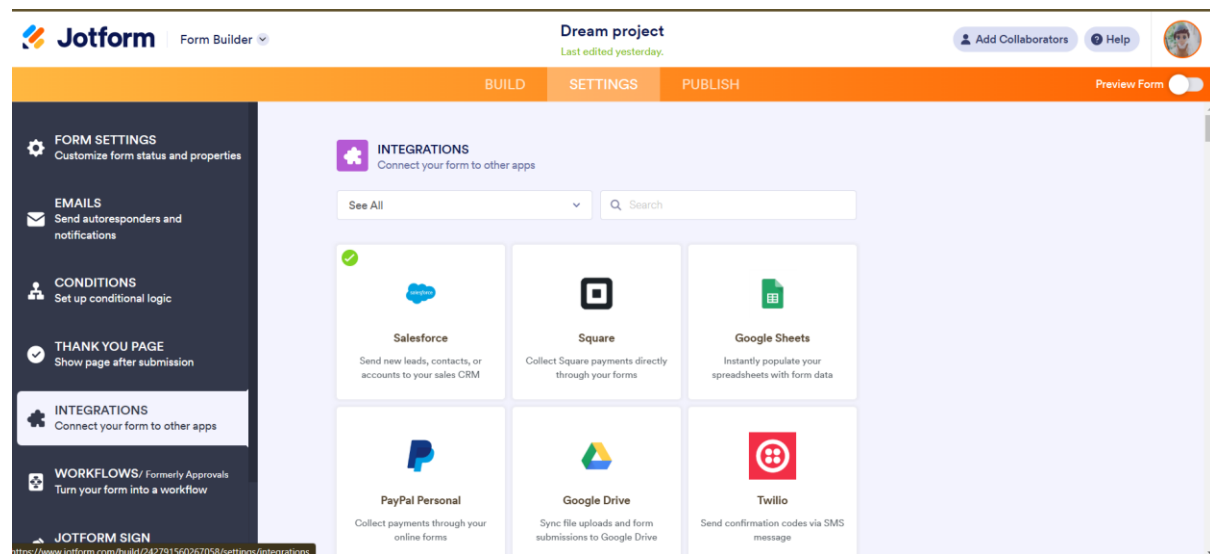


Fig 1.0 Jotform Integration

The integration of Jotform with Salesforce allows for the automated capture of customer details. When a prospective customer fills out a form on the company website, their information is directly stored in Salesforce. This eliminates the need for manual data entry, ensuring accuracy and saving time.

Custom Objects

Two custom objects, Customer and Property, are created to store essential data. The Customer object records user information, verification status, and preferences, while the Property object contains details such as location, type, availability, and approval status.

Approval Process

A robust approval workflow ensures that properties undergo a multi-level validation process. Sales Executives initially review properties, and Sales Managers provide final approval. Verified properties are flagged and made available for customer viewing.

Role and Profile Management

Custom roles (Sales Executive, Sales Manager, and Customer) and corresponding profiles ensure secure and role-specific access to system features. This hierarchical structure prevents unauthorized access and maintains data integrity.

Automation with Flows

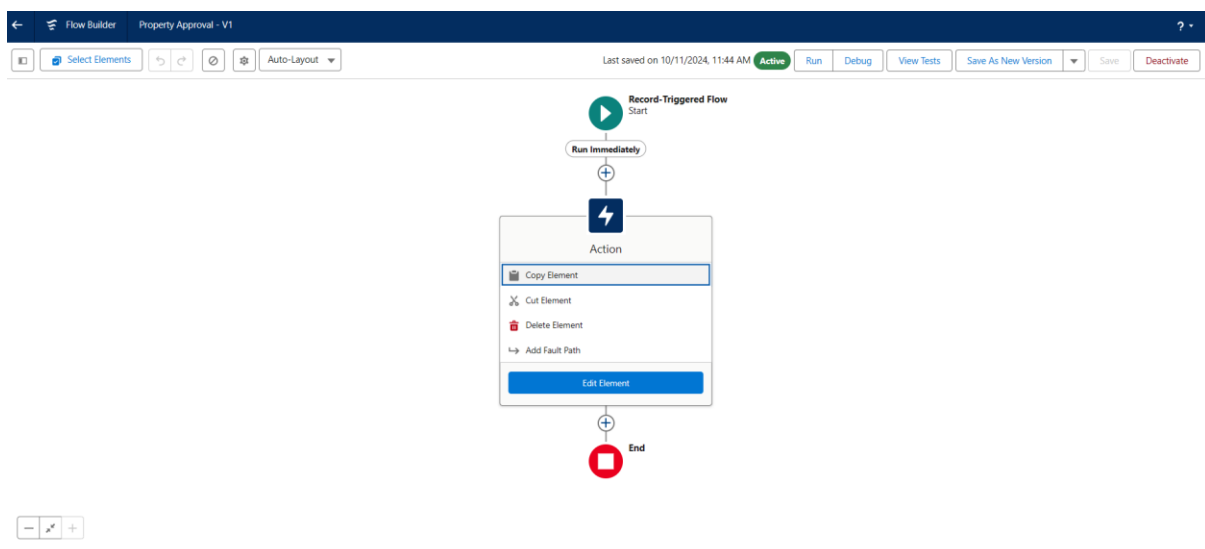


Fig 1.1 Flow chart

Record-triggered flows automate processes such as submitting property records for approval upon creation. This reduces manual workload and speeds up decision-making.

Lightning Web Components

The LWC developed for this project enables customers to filter and view properties based on their preferences and verification status. It provides an intuitive interface that enhances the user experience.

4. Detailed Steps to Solution Design

Integration with Jotform

Form

Name *

First Name

Last Name

Email

example@example.com

Phone Number

(000) 000-0000

Please enter a valid phone number.

Which type of Property are you looking for?

☐ RESIDENTIAL
 ☐ COMMERCIAL
 ☐ RENTAL

Budget Amount *

e.g., 23

Address

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

Fig 1.2 jotform dashboard

- Create a Jotform for collecting customer details, including name, contact information, address, and property preferences.
- Map the Jotform fields to Salesforce `Customer` object fields to automate record creation.
- Publish the form and integrate it with Salesforce using Jotform's built-in Salesforce connector.

Object Creation

Use Salesforce's Object Manager to create the `Customer` and `Property` objects. These objects are configured with fields such as `Verified`, `Type`, `Location`, and `Status` to store all relevant data.

Role and Profile Setup

- Define roles to establish a clear hierarchy:
 - Sales Executive: Handles customer inquiries and property listings.
 - Sales Manager: Oversees approvals and executive activities.
 - Customer: Views properties based on verification status.
- Configure profiles to grant appropriate permissions, ensuring that each role has access to only the data they require.

Approval Workflow

- Create an approval process with criteria such as non-empty location fields and unverified status.
- Set up approval steps:
 - Initial review by Sales Executives.
 - Final approval by Sales Managers.
- Use flows to automate the submission of records for approval.

Lightning Web Component Development

- Develop an LWC to provide a dynamic and interactive property search feature.
- Integrate the LWC with Salesforce data using an Apex class (PropertyHandler_LWC) that retrieves properties based on customer verification and preferences.
- Add the LWC to a dedicated Lightning App page for customer use.

Lightning App

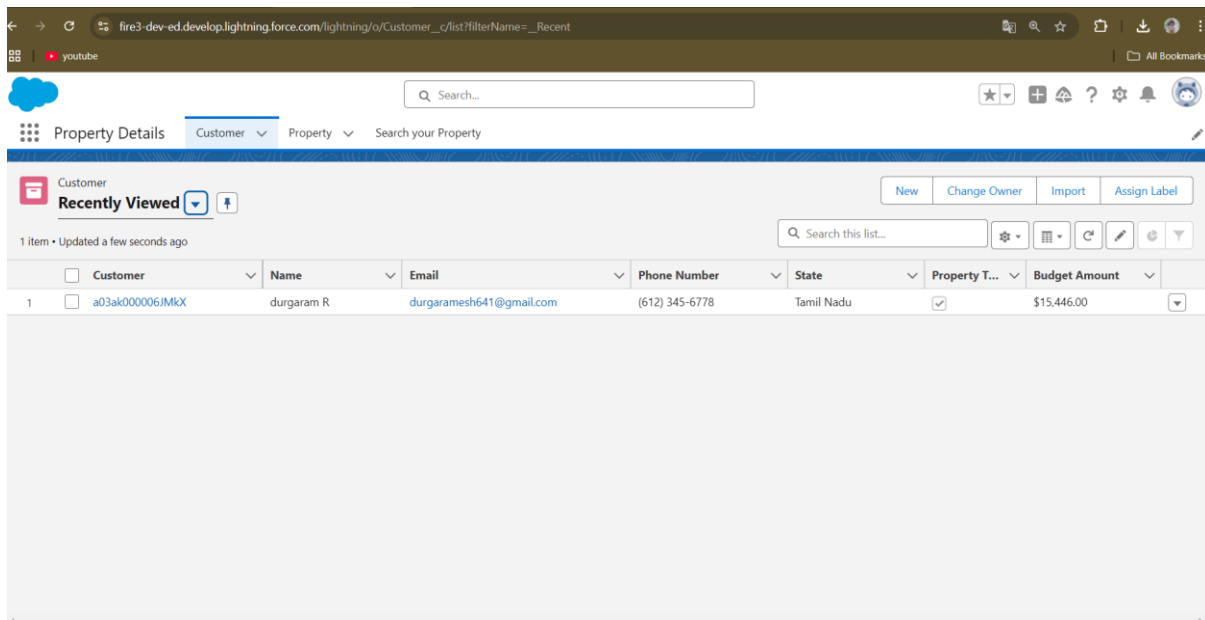


Fig 1.3 Customer Dash board

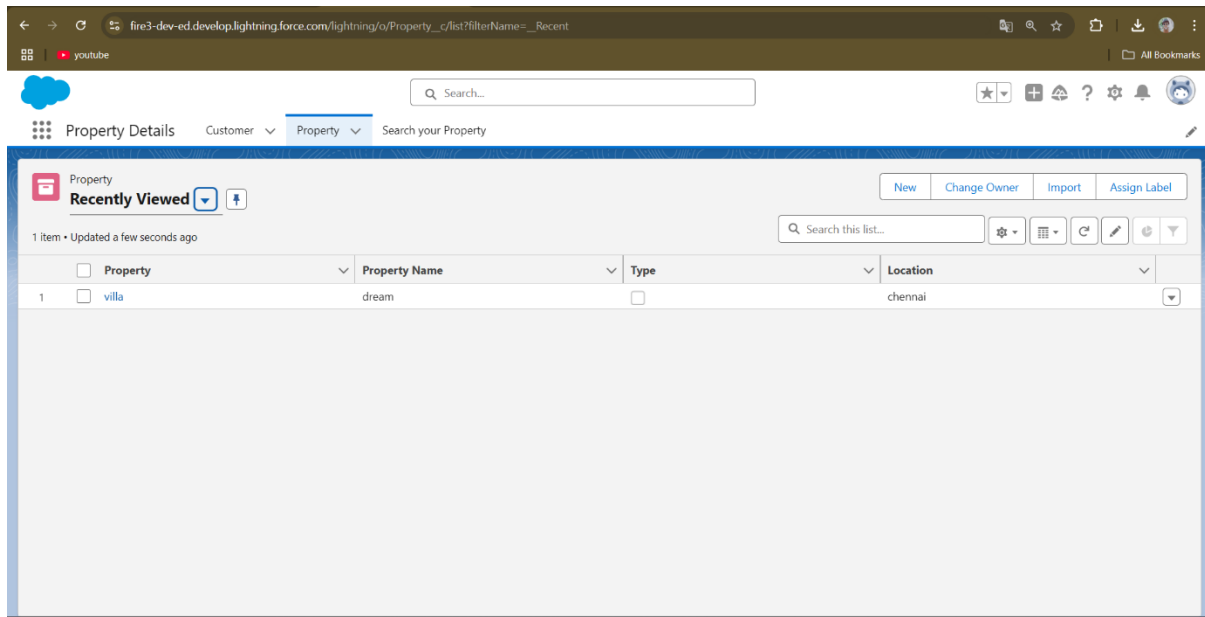


Fig 1.4 Property Dash board

- Create a Lightning App named "Property Details" to display customer and property records.
- Include the LWC on a page titled "Search Your Property" for enhanced customer interaction.

5. Testing and Validation

Testing is a critical phase to ensure that the Salesforce CRM operates as intended:

Unit Testing

- Test all Apex classes, triggers, and flows to validate the correctness of business logic.

- Use test classes to simulate different scenarios, such as property approvals and customer data entry.

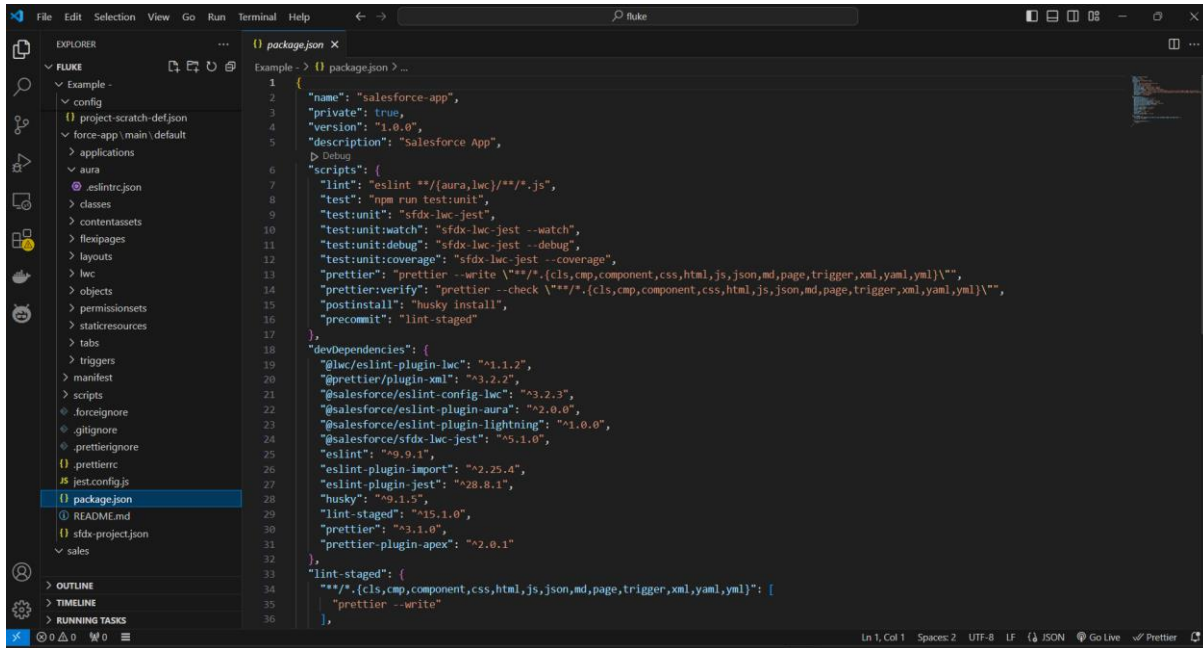
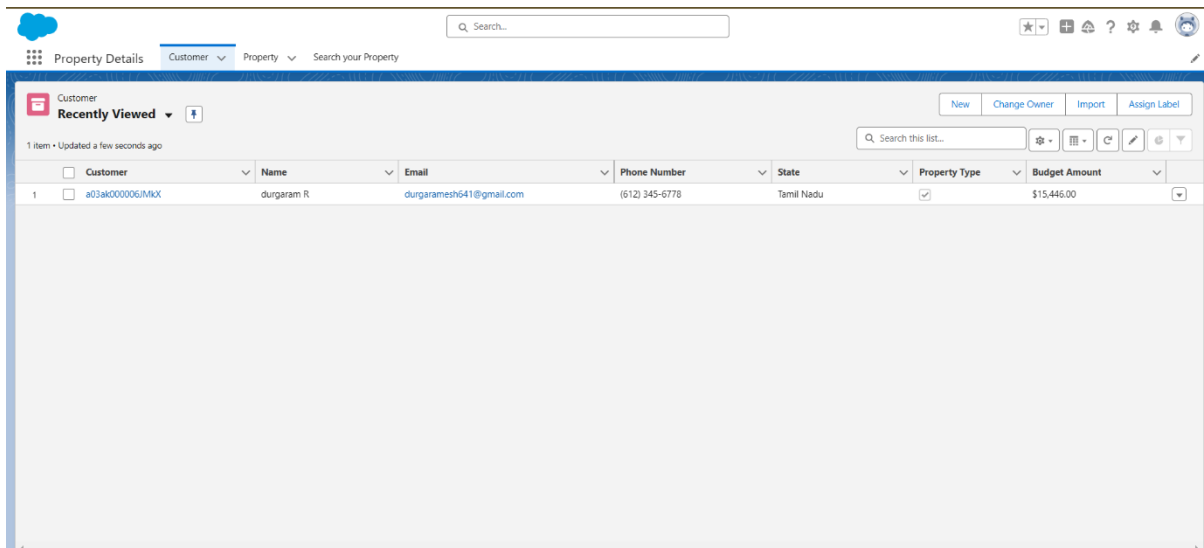


Fig 1.5 Unit Testing

User Interface Testing



Validate the function: Fig 1.6 UI for Property & Customer) and LWC, ensuring responsiveness and ease of use across devices.

End-to-End Testing

Perform comprehensive testing of the entire workflow, from Jotform data submission to property approval and display.

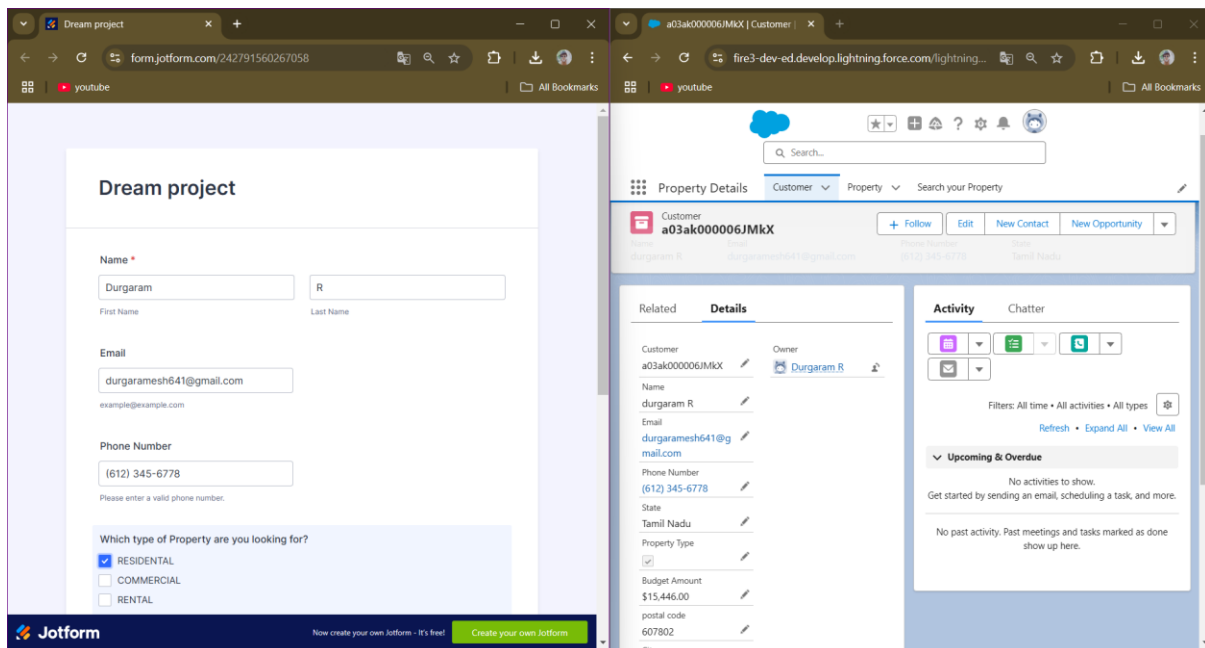


Fig 1.7 Jotform & Salesforce UI

6. Key Scenarios Addressed by Salesforce in the Implementation Project

The Salesforce CRM addresses several critical business scenarios:

1. **Automated Onboarding:** Customers can fill out a form, and their details are automatically captured in Salesforce, eliminating manual errors.
2. **Property Validation:** Properties are verified through a multi-level approval process before being displayed to customers.
3. **Customer Personalization:** Verified customers can access a broader range of properties, while non-verified customers see restricted options.
4. **Real-Time Property Access:** Customers can search for properties in real-time using the LWC interface.
5. **Data Security:** Role-based access ensures that sensitive data is protected and accessible only to authorized personnel.

7. Conclusion

The Salesforce CRM for Dreams World Properties signifies a transformative leap in managing real estate operations. By integrating cutting-edge Salesforce features and automating critical workflows, the system addresses the industry's pressing challenges, such as inefficiencies in manual data entry, delays in property approvals, and the lack of tailored customer experiences. This CRM implementation not only modernizes operations but also empowers Dreams World Properties to provide a highly personalized and customer-centric service.

Key highlights of this project include:

- **Automated Customer Onboarding:**

The integration with Jotform streamlines the data collection process.

Customers can effortlessly submit their details online, which are directly recorded in Salesforce without manual intervention. This reduces administrative workload, minimizes errors, and ensures data accuracy.

- **Personalized Property Recommendations:**

Using a verification-based categorization system, the CRM ensures that verified customers have access to an extensive list of properties, while non-verified customers are provided limited options. This tailored approach enhances user satisfaction and engagement.

This project lays the foundation for improved operational efficiency, customer satisfaction, and business growth.

8. References

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