

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

Project Description:

Dreams World Properties integrates Salesforce to streamline customer interactions. Website engagement triggers automated record creation in Salesforce, capturing customer details and preferences. Salesforce categorizes users as approved or non-approved, offering tailored property selections to approved users. This enhances user experience and efficiency, providing personalized recommendations and broader listings. Seamless integration optimizes operations, improving customer engagement and facilitating growth in the real estate market.

Objectives:

1. Automate customer data capture from the website into Salesforce.
2. Classify customers into approved and non-approved categories for personalized services.
3. Provide tailored property recommendations to enhance user engagement.
4. Centralize property and customer data for streamlined management.

Key Features

1 Customer Data Management

- Automated capture of customer details (e.g., Name, Contact, Preferences).
- Centralized data storage in Salesforce for easy access and updates.

2 User Segmentation

- Categorization into:
 - **Approved Users:** Access to personalized property suggestions.
 - **Non-Approved Users:** Access to broader property listings.

3 Property Listings

- Dynamic and centralized property management.
- Tailored property suggestions for approved users based on preferences.

4 Integration

- Real-time synchronization between website interactions and Salesforce.
- Custom workflows to automate data processing and record creation.

5 Reporting and Analytics

- Real-time dashboards to track customer engagement and property interests.

- Reports on user segmentation, property performance, and operational metrics.

Key Milestones and Activities

Milestone 1: Jotform Integration

Goal: Create a Jotform and integrate it with Salesforce to automate the creation of customer records.

Activities:

1. Created Jotform is mentioned in below

Dream

Name *

First Name

Last Name

Email

example@example.com

Phone Number

000 000 0000

Please enter a valid 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

Submit

2. Create Objects from Spreadsheet:

- Import data from spreadsheets to Salesforce.
- Set up necessary custom objects (e.g., Client, Property).

3. Integrate Jotform with Salesforce Platform:

- Establish a connection between Jotform and Salesforce using APIs or integration tools.
- Ensure automated record creation in Salesforce when a Jotform is submitted.

The screenshot displays the Jotform Form Builder interface. At the top, the Jotform logo is on the left, and the 'Form Builder' dropdown is in the center. On the right, the 'Dream' integration is highlighted, with a status message 'All changes saved at 9:10 AM'. Below the header, there are three tabs: 'BUILD', 'SETTINGS', and 'PUBLISH'. The left sidebar contains several menu items: 'FORM SETTINGS' (Customize form status and properties), 'EMAILS' (Send autoresponders and notifications), 'CONDITIONS' (Set up conditional logic), 'THANK YOU PAGE' (Show page after submission), 'INTEGRATIONS' (Connect your form to other apps), 'WORKFLOWS' (Turn your form into a workflow), 'JOTFORM SIGN' (Power your forms with Jotform Sign), and 'MOBILE NOTIFICATIONS' (Customize mobile app notifications). The main area is titled 'Select a Salesforce Object' and shows a dropdown menu with 'Customer1' selected. Below this, the 'Create a record' section is visible, with the instruction 'Send data from form fields to matched Salesforce fields'. The 'Object Fields' section lists various form fields, and the 'Dream' section lists corresponding Salesforce fields. The fields are mapped as follows: 'Customer1' to 'Name - First Name', 'City' to 'Address - City', 'Budget Amount' to 'Budget Amount', 'Property Type' to 'Which type of property are you looking for?', 'Phone Number' to 'Phone Number', 'Street Address' to 'Address - Street Address', 'Email' to 'Email', 'Customer' to 'Name - Last Name', 'State' to 'Address - State', and 'Street Address line 2' to 'Address - Street Address 2'. Each mapping has a small 'x' icon to its right. At the bottom of the 'Object Fields' section, there is a '+ Add Field' link.

Milestone 2: Role and Profile Management

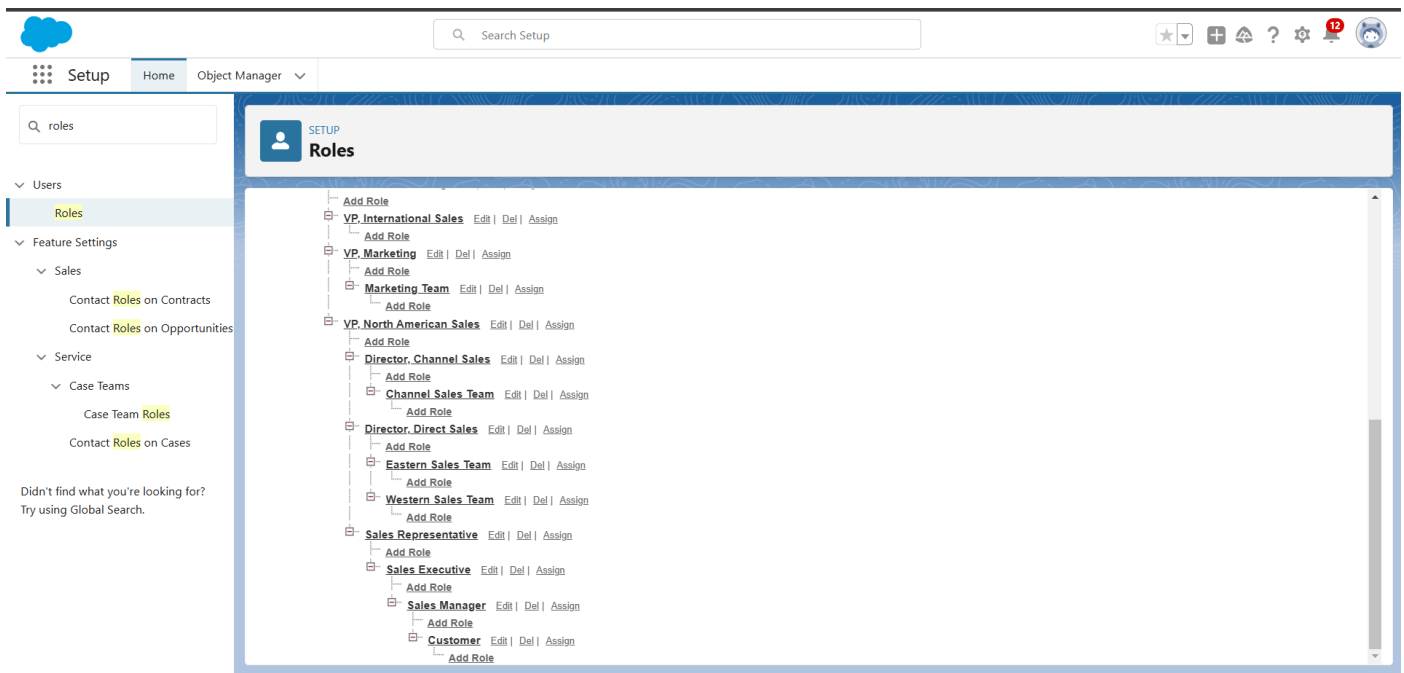
Goal: Establish roles and profiles for users to manage access and security within the CRM system.

Activities:

1. Create Roles:

- **Sales Executive**
 - **Position:** Top-level role in the hierarchy.

- **Responsibilities:**
 - Oversees sales operations and strategy.
 - Monitors team performance and approves high-level decisions.
- **Reports To:** No one (top-level).
- **Sales Manager**
 - **Position:** Mid-level role, directly below Sales Executive.
 - **Responsibilities:**
 - Manages the sales team and handles customer relationships.
 - Assigns leads and tracks team performance.
 - **Reports To:** Sales Executive.
- **Customer**
 - **Position:** Entry-level role, below Sales Manager.
 - **Responsibilities:**
 - Submits property requirements and preferences.
 - Collaborates with Sales Managers for assistance.
 - **Reports To:** Sales Manager.



Milestone 3: Property Management

Goal: Create a property management system within Salesforce for tracking and approval processes.

Steps to Create the "Property Details" Lightning App

1. **Go to App Manager**
 - From **Salesforce Setup**, type "**App Manager**" in the Quick Find box.
 - Click on **App Manager**.
2. **Create a New Lightning App**

- In the App Manager, click on the **New Lightning App** button.
- 3. **Define App Details**
 - **App Name:** Enter "**Property Details**".
 - **Developer Name:** Automatically populated (can leave as is).
 - **Description:** Add a brief description, e.g., "App for managing Customers and Property data."
 - Click **Next**.
- 4. **App Branding** (Optional)
 - Upload a custom logo if required.
 - Select a color scheme for the app.
 - Click **Next**.
- 5. **Navigation Style**
 - Choose **Standard Navigation** (default option for most apps).
 - Click **Next**.
- 6. **Add Objects**
 - In the **Select Items** step, search for and add the following objects:
 - **Customer**
 - **Property**
 - Drag and drop them into the **Selected Items** section.
 - Click **Next**.
- 7. **Set Profiles**
 - Assign the app to the appropriate user profiles (e.g., **Sales Manager, Sales Executive**).
 - Select profiles by checking the boxes next to their names.
 - Click **Save & Finish**.

Accessing the Lightning App

- Go to the **App Launcher** (grid icon in the top-left corner of Salesforce).
- Search for "**Property Details**" and open the app.
- The app will display the **Customer** and **Property** objects for easy access.

Steps to Create and Configure the "Customer" Profile

1. **Navigate to Profiles**
 - From **Setup**, type "**Profiles**" in the Quick Find box.
 - Click on **Profiles**.
2. **Clone the Salesforce Platform User Profile**
 - Locate the **Salesforce Platform User** profile in the list.
 - Click the **Clone** link next to it.
3. **Name the New Profile**
 - **Profile Name:** Enter "**Customer**".
 - Click **Save**.

1: Modify Custom App Settings

1. In the "**Customer**" profile, scroll to the **Custom App Settings** section.
2. **Uncheck All Custom Apps** except "**Property Details**".

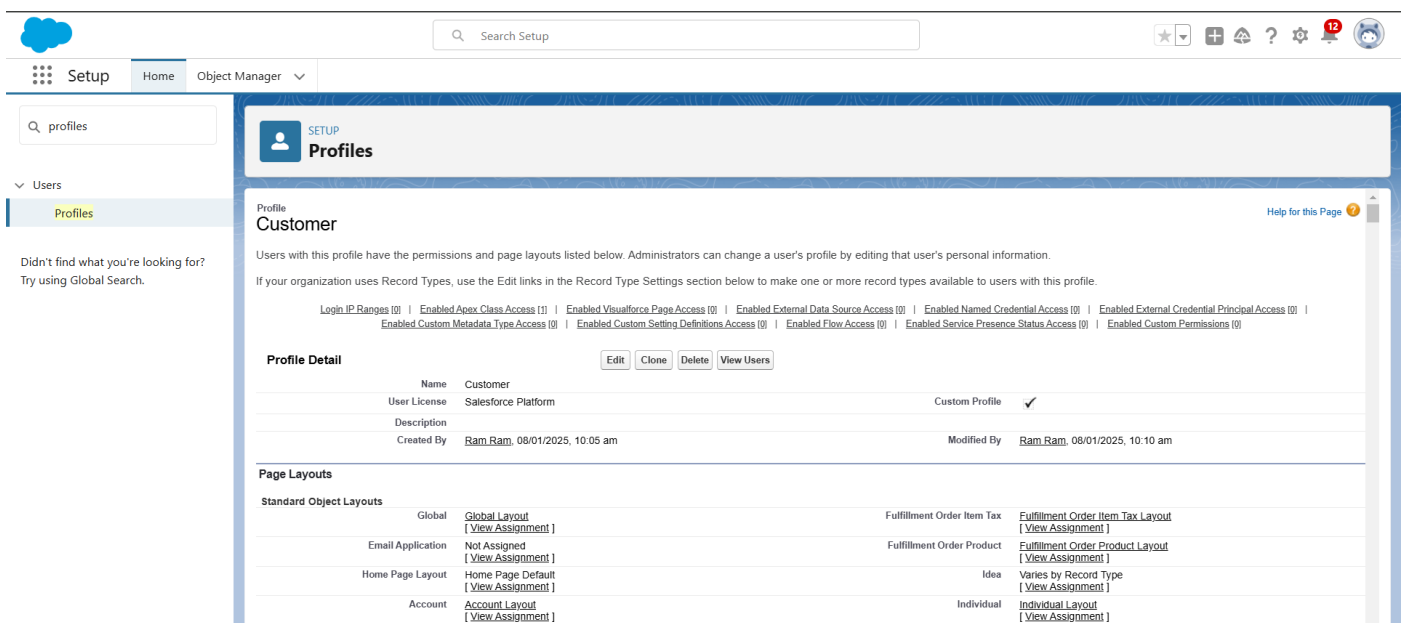
- Ensure only the **Property Details** app is checked.

2: Remove Standard Object Permissions

1. Scroll to the **Standard Object Permissions** section.
2. Uncheck all permissions (Read, Create, Edit, Delete) for all standard objects.

3: Modify Custom Object Permissions

1. Scroll to the **Custom Object Permissions** section.
2. **Uncheck All Permissions** for every custom object except "**Property**".
 - For the **Property** object, check only:
 - **Read**
 - **View All**



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' entered. The main content area is titled 'SETUP Profiles' and shows the 'Customer' profile. Below the title, there is a description and a list of permissions. The 'Profile Detail' section shows the profile name 'Customer', user license 'Salesforce Platform', and creation/modification details. The 'Page Layouts' section shows a table of layouts assigned to the profile.

Page Layouts			
Standard Object Layouts			
Global	Global Layout [View Assignment]	Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Fulfillment Order Product	Fulfillment Order Product Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Idea	Varies by Record Type [View Assignment]
Account	Account Layout [View Assignment]	Individual	Individual Layout [View Assignment]

Result

- The **Customer** profile now has access only to the **Property Details** app and the **Property** object with **Read** and **View All** permissions.
- It has no permissions for any other standard or custom objects.

Similarly create the **Manager** profile.

Steps to Create the "Verified" Checkbox Field

1. **Navigate to Object Manager**
 - From **Setup**, type "**Object Manager**" in the Quick Find box.
 - Click on **Object Manager**.

2. Search for the User Object

- In the Object Manager search bar, type "**User**".
- Select the **User** object from the results.

3. Go to Fields & Relationships

- In the User object setup page, click on **Fields & Relationships** in the left-hand menu.

4. Create a New Field

- Click on the **New** button at the top of the Fields & Relationships list.

5. Choose Field Type

- Select **Checkbox** as the **Data Type**.
- Click **Next**.

6. Define Field Details

- **Field Label:** Enter "**Verified**".
- **Default Value:**
 - Leave unchecked (default is "False").
- **Field Name:** This will auto-populate as "**Verified**".
- Click **Next**.

7. Set Field-Level Security

- Select the profiles that should have access to this field (e.g., **Sales Executive**, **Sales Manager**, or **Customer**).
- Ensure **Read-Only** or **Editable** access is configured as needed.
- Click **Next**.

8. Add to Page Layouts

- Select the page layouts where the **Verified** field should appear.
- Click **Save**.

The screenshot displays the Salesforce Setup interface for configuring a custom field. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the navigation menu with 'Setup' selected, and 'Object Manager' expanded. The main content area is titled 'User' and shows the 'Fields & Relationships' section. The 'Verified' field is being configured. The 'Custom Field Definition Detail' section includes tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table shows the following details:

Field Label	Verified	Object Name	User
Field Name	Verified	Data Type	Checkbox
API Name	Verified__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ram Ram, 08/01/2025, 10:10 am	Modified By	Ram Ram, 08/01/2025, 10:10 am

The 'General Options' section shows the 'Default Value' as 'Unchecked'. The 'Validation Rules' section indicates 'No validation rules defined.' and includes a 'New' button to add rules. The bottom of the page shows a 'Back To Top' link and a note to 'Always show me more records per related list'.

Result

You now have a "**Verified**" checkbox field on the **User** object. Users can toggle this field to indicate whether

a user is verified or not.

Steps to Create the "Users"

Create 4 separate users following the same steps, making sure to fill in unique details like **Username**, **First Name**, and **Email** for each new user.

- Go to **Setup**.
- Under **Administration**, select **Users**.
- Click on **New User**.

User 1:

- Last Name: Executive
- Role: Sales Executive
- License: Salesforce
- Profile: System Administrator
- Click **Save**.

User 2:

- Last Name: Manager
- Role: Sales Manager
- License: Salesforce Platform
- Profile: Manager
- Click **Save**.

User 3:

- Last Name: Customer
- Role: Customer
- License: Salesforce Platform
- Profile: Customer
- Click **Save**.

User 4:

- Last Name: Customer2
- Role: Customer
- License: Salesforce Platform
- Profile: Customer
- Click **Save**.

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings

Users

Feature Settings
Data.com
Prospector
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface

SETUP Users

All Users [Help for this Page](#)

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. [Let's Go](#)

View: **All Users** Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00dd000000ingequax_uu7ppm2zhkz3@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Customer	cust	customer12@sale.com	Customer	✓	Customer
<input type="checkbox"/> Edit	Customer2	cust2	customer212@sale.com	Customer	✓	Customer
<input type="checkbox"/> Edit	Executive	exec	executive12@sale.com	Sales Executive	✓	System Administrator
<input type="checkbox"/> Edit	Manager	mana	manager12@sale.com	Sales Manager	✓	Manager
<input type="checkbox"/> Edit	Ram_Ram	RRam	ram@project.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dd000000ingequax.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dd000000ingequax.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

Steps to Create Approval Process for Property Object:

1. Log in to Salesforce:

- Ensure you have the necessary admin permissions to create the approval process.

2. Navigate to Setup:

- Click the **Gear icon** (⚙️) in the top-right corner.
- Select **Setup**.

3. Access Approval Processes:

- In the **Quick Find** search box, type **Approval Processes**.
- Under **Process Automation**, select **Approval Processes**.

4. Select the Property Object:

- Choose the **Property** object from the list of available objects.

5. Create New Approval Process:

- Click the **Create New Approval Process** button.
- Select **Use Standard Setup Wizard**.
- Enter **Process Name**: Property Approval.

6. Define Criteria for Entry:

- Add the following criteria:
 - **Location is not equal to blank.**
 - **Verified Equals false.**
- This ensures the process only starts when the location is filled in and the record has not been verified.

7. Select the Automated Approver:

- Choose **Next Automated Approver Determined By**: Select **Manager**.
- This will automatically route the approval to the manager.

8. Record Editability Properties:

- From **Record Editability Properties**, select **Administrators or the currently assigned approver can edit records during the approval process**.
- This ensures only the approver or administrator can make changes while the record is being approved.

9. Select Fields to Display on Approval Page Layout:

- Select the following fields to display on the approval page layout:
 - **Property**
 - **Owner**
 - **Location**
 - **Type**
- These fields will be visible to the approvers when reviewing the records.

10. Select Initial Submitters:

- Choose the following initial submitters for the approval process:
 - **Owner**: Property Owner.
 - **Roles**: Sales Manager.

11. Click Next and Save:

- Click **Next** and review the settings.
- Click **Save**.

Approval Step: Executive Approval

12. Add an Approval Step:

- Click **Add Approval Step**.
- Name the step: **Executive Approval**.

13. Define Criteria for Approval Step:

- Specify the criteria: **All records should enter this step.**
- This ensures that every record enters the **Executive Approval** step, regardless of other conditions.

14. Select Approvers:

- Select the approvers for this step:
 - **Sales Executive.**

15. Save the Step:

- After selecting the approvers, click **Save** to add the step to the approval process.

The screenshot displays the Salesforce Setup interface for configuring an approval process. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Approval Processes' and shows the configuration for a 'Property Approval' process. The 'Process Definition Detail' section includes fields for Process Name, Unique Name, Description, Entry Criteria, Record Editability, and Approval Assignment Email Template. The 'Initial Submission Actions' section shows a 'Record Lock' action. The 'Approval Steps' section shows a single step named 'Executive Approval' with criteria '(Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS False)', assigned to 'User: Ram Ram', and a reject behavior of 'Final Rejection'.

Final Steps:

16. Activate the Approval Process:

- Once you have set up the approval process and all the steps, click **Activate** to make it active.

17. Review the Approval Process:

- Go back to the **Approval Processes** page under the **Property** object and verify that the process is listed and active.

Steps to Create a Record Trigger Flow to Submit the Approval Process Automatically for the Property Object:

1. Log in to Salesforce:

- Make sure you have the necessary permissions to create a flow.

2. Navigate to Flows:

- Click on the **Gear icon** (⚙️) in the top-right corner.
- Select **Setup**.
- In the **Quick Find** box, search for **Flows**.

3. Create a New Flow:

- Click **New Flow**.
- Choose **Record Trigger Flow**.

4. Select the Object:

- Select the **Object: Property**.

5. Define Trigger Criteria:

- Choose **Trigger the Flow When: A record is created**.
 - This ensures that the flow is triggered whenever a new Property record is created.

6. Set Entry Conditions:

- For this scenario, choose **None** for entry conditions. This means the flow will trigger on every record creation without specific conditions.

7. Add Action to Submit for Approval:

- Click **+ Add Element**.
- Select **Action** from the options.
- In the **Action** dropdown, choose **Submit for Approval**.

8. Configure the Submit for Approval Action:

- **Label:** Give the action a name like **Approval for Property**.
- **Record ID:** Set the Record ID to **{!\$Record.Id}**.
 - This ensures the flow will submit the **current Property record** for approval.

9. Save the Flow:

- After configuring the action, click **Done**.
- Click **Save** to save the flow.

- **Label:** Name the flow **Property Approval**.

10. Activate the Flow:

- After saving the flow, click **Activate** to make the flow live.

The screenshot displays the Salesforce Flow Builder interface for a flow named 'Property Approval - V1'. The flow canvas on the left shows a sequence of steps: a 'Record-Triggered Flow Start' node, followed by a 'Run Immediately' node, then an 'Approval for property' action node, and finally an 'End' node. The right-hand panel is titled 'Submit for Approval' and contains configuration fields for the 'Approval for property' action. The 'Label' field is set to 'Approval for property', and the 'API Name' field is set to 'Approval_for_property'. The 'Description' field is empty. Below these fields, there is a section for 'Set Input Values for the Selected Action'. The 'Record ID' input is set to 'Triggering Property_1__c > Record ID'. The 'Approval Process Name Or ID' input is currently empty, with a 'Not Included' toggle switch visible to its right. The top of the interface shows the 'Flow Builder' tab, the flow name 'Property Approval - V1', and various action buttons like 'Run', 'Debug', 'View Tests', 'Save As New Version', 'Save', and 'Deactivate'.

Steps to Create an App Page for the Property Object:

1. Log in to Salesforce:

- Ensure you have the necessary permissions to create and configure pages.

2. Navigate to Lightning App Builder:

- Click the **Gear icon** (⚙️) in the top-right corner and select **Setup**.
- In the **Quick Find** search box, type **Lightning App Builder**.
- Click on **Lightning App Builder**.

3. Create a New App Page:

- Click on the **New** button.
- Select **App Page** and then click **Next**.

4. Set App Page Details:

- **Label:** Enter the name **Search Your Property**.
- Click **Next** to continue.

5. Choose the Layout:

- Select the **Header and Left Sidebar** layout (this will display the necessary components in the header and sidebar).
- Click **Done**.

6. Save the Page:

- After configuring the layout, click **Save**.

7. Activate the Page:

- Click **Activate** to make the page available for use.

8. Page Activation Settings:

- In the **Page Settings** panel, select **Activate for All Users**.
- This ensures that all users will have access to the app page.

9. Add App Page to Property Details:

- In **Lightning Experience**, go to the **Property Details** object page.
- Click on **Add Page** to associate the new page with this object.
- Once done, click **Save** to finalize the addition.

Steps to Create an LWC Component for Verified and Non-Verified Customers:

Here is a detailed guide to create a **Lightning Web Component (LWC)** that restricts access to properties based on customer verification status, and deploy it on the **Search Your Property Page**:

1. Set Up the LWC Component:

You will need to create an LWC component that will:

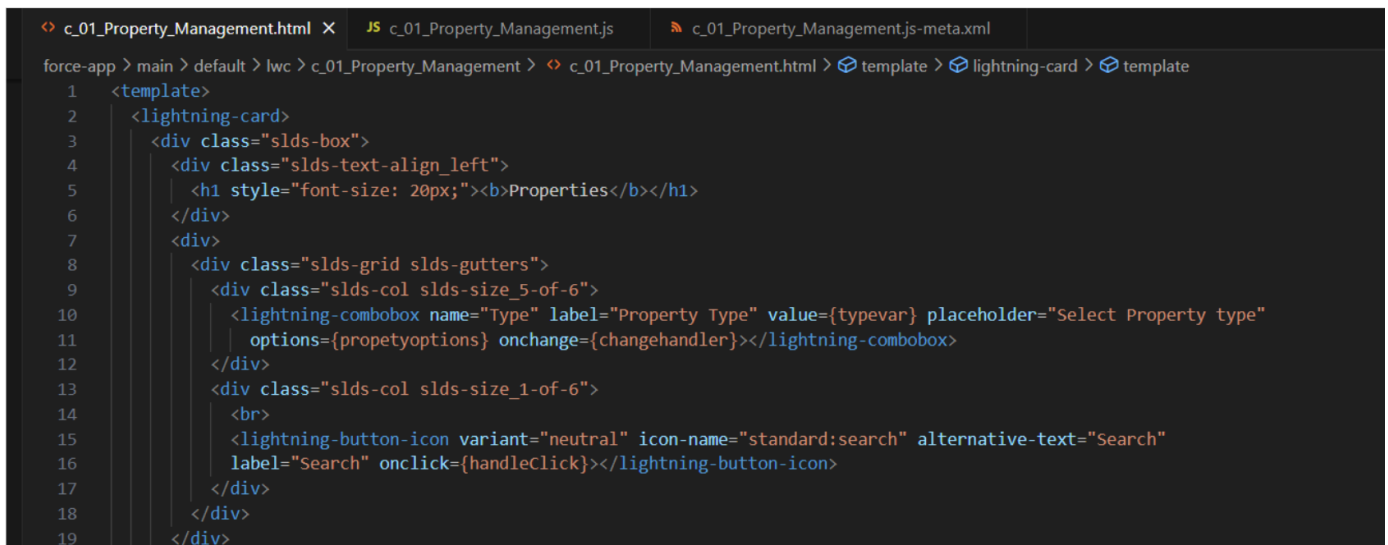
- Check the verification status of the customer.
- Display only verified properties to verified customers and non-verified properties to non-verified customers.

2. Create the LWC Component:

A. Prepare the Component Structure:

1. **Navigate to Developer Console** or use **VS Code** to create the LWC.
2. Create a new Lightning Web Component (LWC) with the following files:
 - **HTML File** (e.g., `propertyDisplay.html`)
 - **JS File** (e.g., `propertyDisplay.js`)

■ Meta File (e.g., propertyDisplay.js-meta.xml)



```
1 <template>
2   <lightning-card>
3     <div class="slds-box">
4       <div class="slds-text-align_left">
5         <h1 style="font-size: 20px;"><b>Properties</b></h1>
6       </div>
7       <div>
8         <div class="slds-grid slds-gutters">
9           <div class="slds-col slds-size_5-of-6">
10            <lightning-combobox name="Type" label="Property Type" value={typevar} placeholder="Select Property type"
11              options={propetyoptions} onchange={changehandler}></lightning-combobox>
12          </div>
13          <div class="slds-col slds-size_1-of-6">
14            <br>
15            <lightning-button-icon variant="neutral" icon-name="standard:search" alternative-text="Search"
16              label="Search" onclick={handleClick}></lightning-button-icon>
17          </div>
18        </div>
19      </div>
20    </div>
21  </lightning-card>
22 </template>
```

Steps to Add the LWC Component to Your App Page ("Search Your Property"):

Here is the detailed guide to add the **LWC Component** (PropertyDisplay) to the **Search Your Property Page** within Salesforce:

1. Go to App Launcher:

- Click on the **App Launcher** (Grid icon) in the top-left corner of Salesforce.
- In the search box, type **Property Details** and select the corresponding page.

2. Edit the Page:

- Once you're on the **Property Details** page, click the **Gear icon** (⚙️) in the top-right corner of the page.
- Select **Edit Page** from the dropdown. This will open the **Lightning App Builder** in edit mode.

3. Drag the Component to the Page:

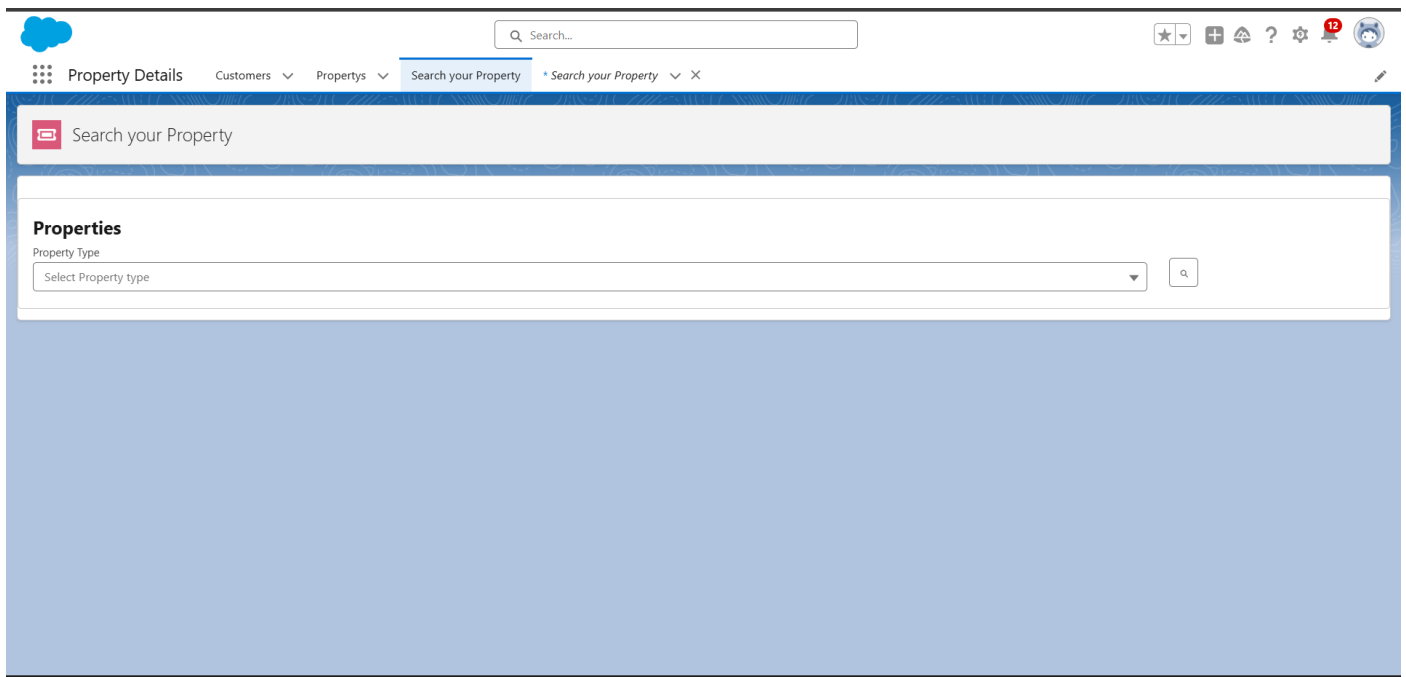
- In the **Lightning App Builder**, on the left side, you should see the list of components available (including your custom components).
- Find your **LWC Component** (PropertyDisplay) under the **Custom Components** section.
- Drag the **PropertyDisplay** component onto the desired location on the page layout.

4. Save the Page:

- After adding the component, click **Save** to save the changes to the page.

5. Activate the Page:

- Once saved, you can activate the page to make it available to all users or select specific user profiles. This can be done in the **Page Activation** settings within the App Builder.



Steps to Give Access to Apex Classes for Specific Profiles:

Here's how to grant access to the **Apex Class** (`PropertyHandler__LWC`) to the **Manager** and **Customer** profiles:

1. Navigate to Apex Classes:

- In Salesforce, click the **Gear icon** (⚙️) in the top-right corner and select **Setup**.
- In the **Quick Find** search box, type **Apex Classes**.
- Click on **Apex Classes** under the **Develop** section.

2. Find the Apex Class:

- Locate the **Apex Class** you want to give access to (e.g., **PropertyHandler__LWC**).
- Click on the **Security** link next to the class name (this will open the class' security settings).

3. Edit Access for Profiles:

- Under **Apex Class Access** settings, you will see a list of profiles.
- To give access to the class for specific profiles, check the boxes for the **Manager** and **Customer** profiles.

4. Save the Changes:

- After selecting the profiles, click **Save** to apply the access settings.

Final Outcome:

★

+

🔍

?

⚙️

12

🔒

Property Details

Customers

Propertys

Search your Property

Customers

Recently Viewed

New

Change Owner

Import

Assign Label

4 items • Updated a few seconds ago

⚙️

📄

🔄

✎

🗑️

🔍

<input type="checkbox"/>	Customer1	Customer	Phone Number	Emial	State	Property Type	Budget A...	Street Address	Street Address...	City	
1	<input type="checkbox"/> Shaik	Farhath	(338) 478-3647	farhath@gmail.com	Andhra Pradesh	Commercial	5,00,000	Kottooru	nadd	Ulavapadu	▼
2	<input type="checkbox"/> Venket	Sai	(336) 655-8748	venket@123.com		Commercial	8,00,000	Kakinada			▼
3	<input type="checkbox"/> Ram	Sri	(999) 999-9999	ram@123gmail.com		Rental	5,00,000	Bhimavaram			▼
4	<input type="checkbox"/> ram	venkat	(810) 601-5238	ram@gmail.com	AP	Residential	5,00,000	kothhuru,ulavapadu	masjid street	nellore	▼

Filter

Columns

Form

Download All

+

ADD

Testing and Validation:

1. Unit Testing:

- Verify the functionality of individual components such as data capture flows, approval processes, and LWCs.
- Ensure test cases cover all possible user scenarios.

2. Integration Testing:

- Test end-to-end functionality, ensuring seamless interaction between the website and Salesforce.
- Validate the accuracy of data synchronization.

3. User Acceptance Testing (UAT):

- Collaborate with stakeholders to confirm that the system meets their requirements.
- Address any feedback or adjustments needed.

4. Performance Testing:

- Assess the system's performance under various loads to ensure reliability.
- Optimize areas with potential bottlenecks.

5. Security Testing:

- Verify data access permissions based on roles and profiles.
- Ensure sensitive customer data is securely stored and transmitted.

Key Scenarios:

1. Milestone 1: Automating Customer Record Creation

- Integrate JotForm with Salesforce to capture customer data and preferences automatically.

2. Creating and Managing Objects:

- Create objects from spreadsheets to import initial data.
- Use Salesforce to manage and update these objects.

3. User and Role Management:

- Create user roles and profiles to control data access and permissions.
- Add a checkbox field to manage user approval status.

4. Property Details App:

- Develop an app to store, display, and manage property details.

5. Approval Process:

- Implement an approval process for property objects to streamline decision-making.
- Use record-triggered flows to automate approval submissions.

6. LWC Component:

- Create and drag an LWC component to an app page to enhance UI functionality.

7. Apex Class Access:

- Grant Apex class access to profiles for advanced functionality.

Conclusion

This CRM application will provide a comprehensive solution for managing clients and their property-related requirements. With automated workflows, streamlined processes, and an intuitive interface, Dreams World Properties will achieve greater efficiency and customer satisfaction.