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.

1. Client Management
    a. Add, update, and delete client details.
    b. Track client preferences, budget, and location interests.
    c. Maintain contact details and communication history.

2. Property Management
    a. Manage property listings with details like type, price, location, and features.
    b. Track properties useable for sale, rent, or lease.
    c. Upload photos and documents for properties.

3. Requirement Matching
    a. Match client demand with useable properties using filters.
    b. Notify clients about new properties that fit their measure.

4. Lead Tracking
    a. Manage inquiries and follow up with potential clients.
    b. Schedule meetings and site visits.
    c. Assign leads to specific team members.

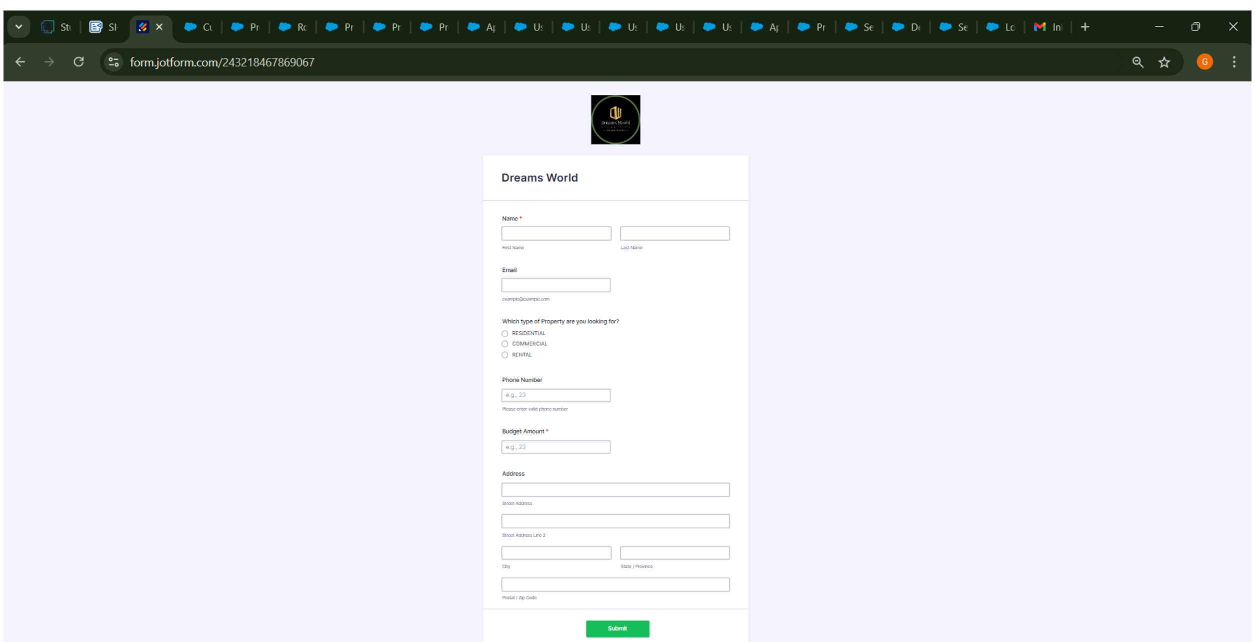
Milestone 1: Create a Jot form and integrate it with the org to create a record of customers automatically.

Client wants a form for the customers to get the details directly into the salesforce so that the admins can create a user in the organization.Client wants a form for the customers to get the details directly into the salesforce so that the admins can create a user in the organization.

Activity1

Open your browser and search for jot form and log in.

1. After login, click on create form and click on start from scratch
2. Now create a form to get the customer details like Name, Phone,EmaiI, Address and type of property the customer is interested in.
3. Once the form is created, publish it by clicking on publish.
4. form link :-https://form.jotform.com/21501a0534/SweetHome



Create Objects from Spreadsheet

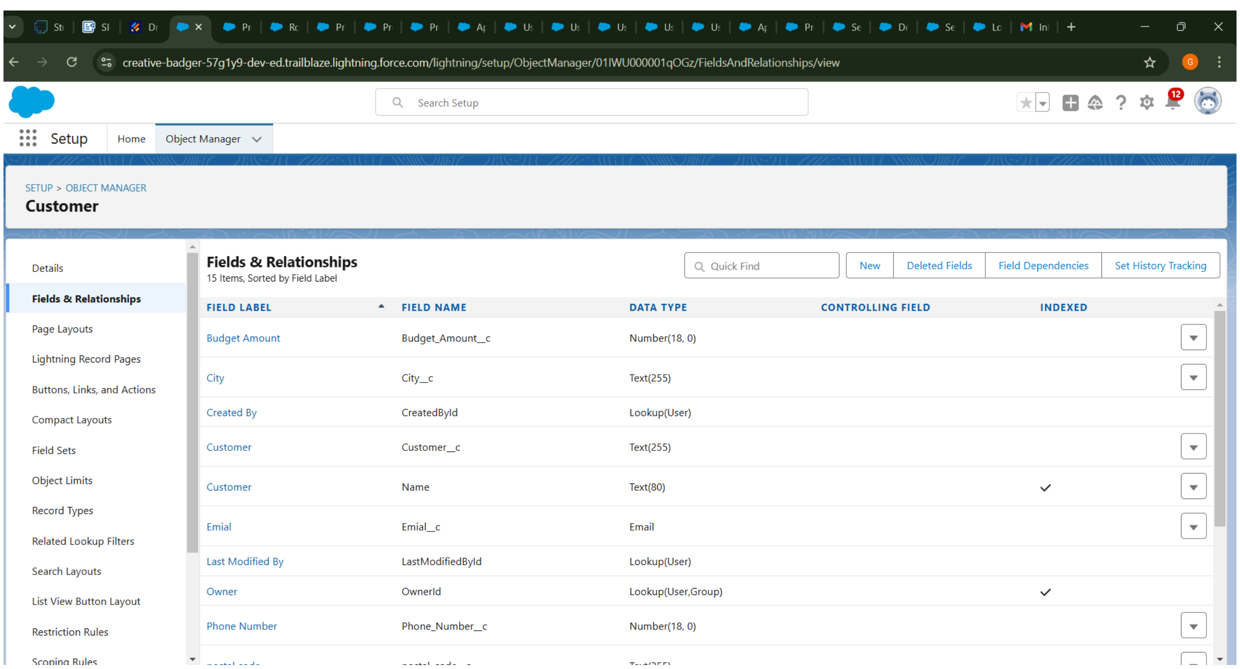
Directly Creating Objects from a Spreadsheet in Salesforce

Creating Customer Object :

1. Go to your object manager and click on create object from spreadsheet.
2. Click on the link to get the spreadsheet
3. [customer]()

Customer	Phone Number	Emial	State	Property Type	Budget Amount	Street Address	Street Address	City	postal code	Verified
Rakesh	788797	rakesh@gmail.	Telangana	Residential	4000000	gb road	street no 45	Hyderabad	555001	checked
prakash	55448855	p@gmail.com	Maharashtra	Commercial	8000000	gachibowli	indira road	mumbai	6600014	unchecked
Prajwal	454545	prajwal@gmail.	Maharashtra	Rental	25000	kamdli	kathora	Amravati	444805	checked

After downloading, upload the file, map the fields, and upload to create an object.

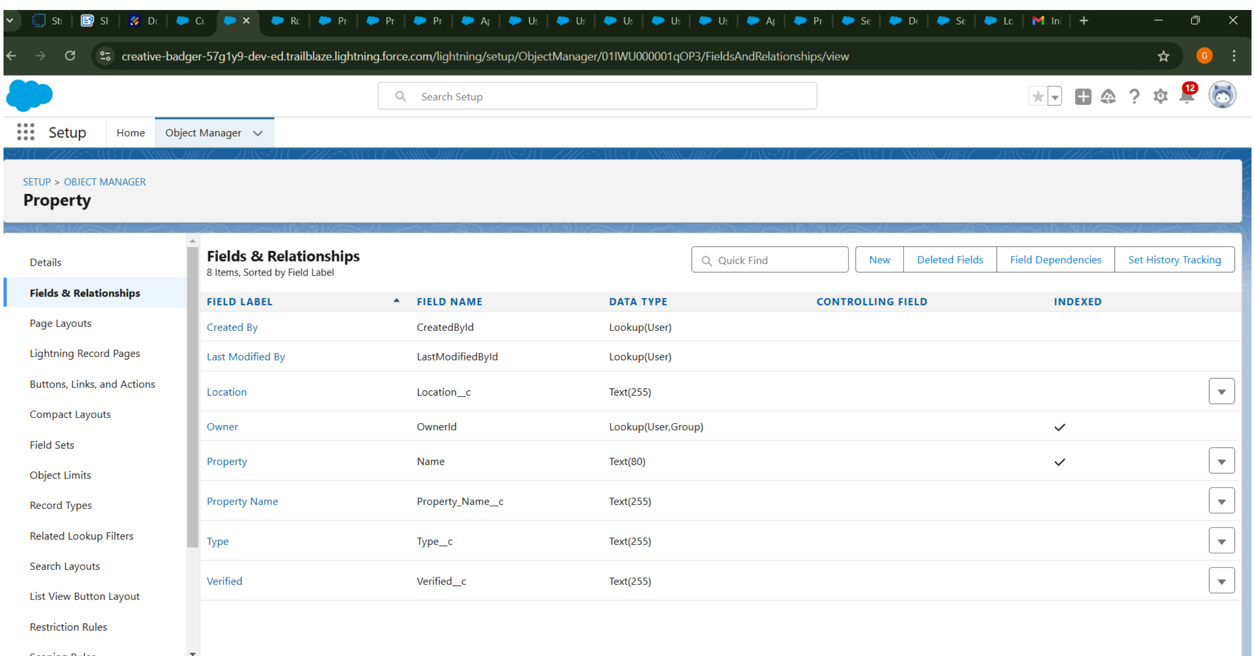


Creating Property Object

1. Follow the same from the customer object to create the Property Object
2. Property

A	B	C	D
Property Name	Type	Location	Verified
Lotus Appartme	Residential	hydeerabad	checked
500000 sq.ft pl	Commercial	Amravati	uchecked
3 Bhk fkat at st	rental	Jubliee hill Hyd	Checked

After downloading, upload the file, map the fields, and upload to create an object. the fields are as follows



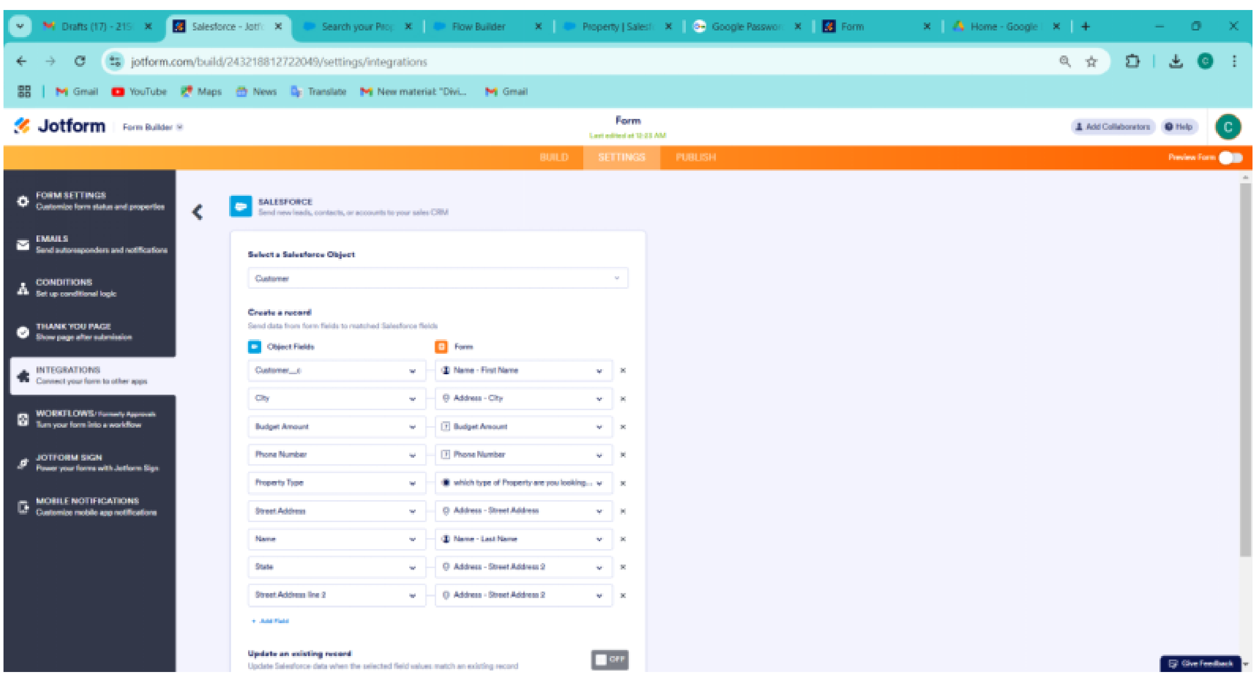
Integrate Jot form with Salesforce Platform

In this Milestone, we are going to integrate jot form with Salesforce

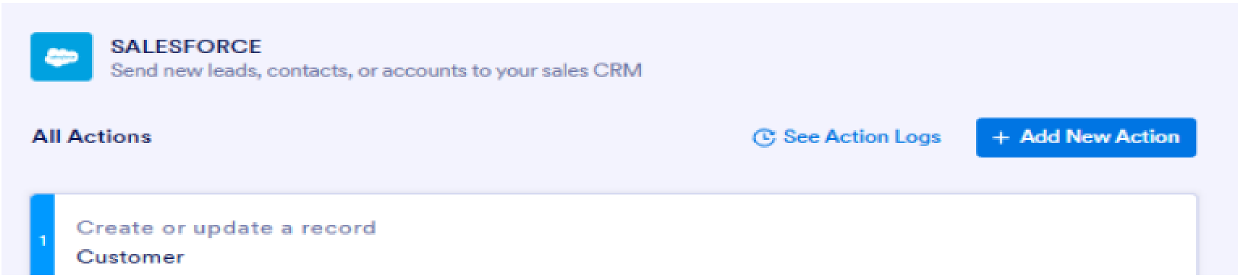
Activity

1. On the Jot form Platform, Click on Integration and choose Salesforce
2. Click on User Integration and choose “Add to From”
3. Select the Organization with which you want to Integrate your jot form with and select your account
4. Select an Action - Create a record.
5. Select a Salesforce Object : - Customer

Map Every field on the Object with the fields on the form and “Save Action”.



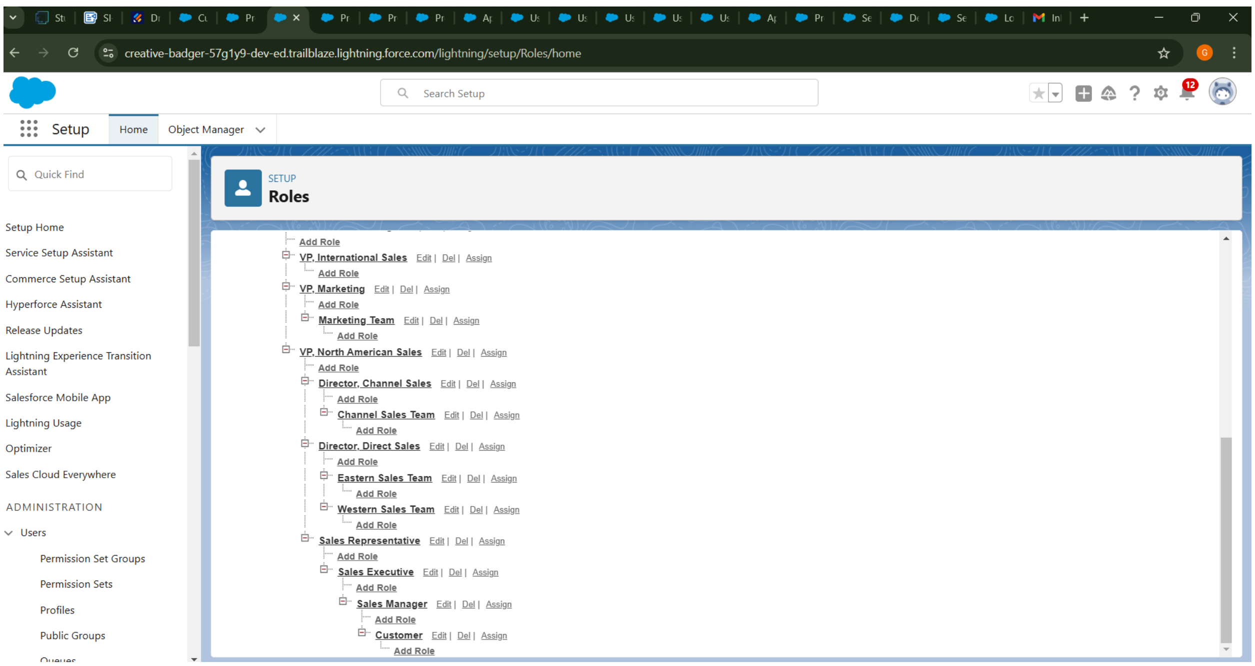
Then “Save the Integration” and “Finish.”



Create Roles

here we need to Create Roles as per business essential

Activity:- 1



1. if we don't find a sales representative, we need to create it according to the need
2. It will use the "System Administrator Profile".
3. Label - Sales Executive
4. Reports to - Sales Representative

Similarly, Create a Role Name "Sales Manager" below Sales Executive, which reports to Sales Executive; Also, Add a Role below Sales Manager labeled as "Customer" which reports to Sales Manager.

Create a Property Details App

An App where the objects will be displayed

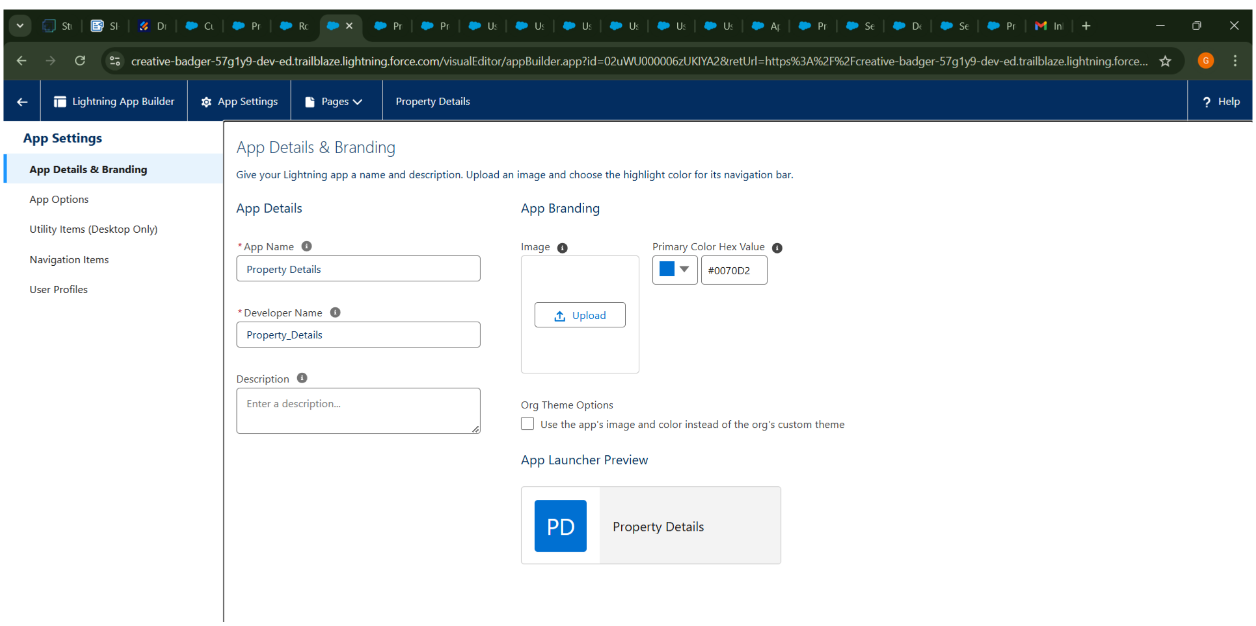
Activity1

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

2. Click Next >» Next >» Save and Add “System Admin "Profile.

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.



Create Profiles

Create profiles as per business requirement

Creating Customer Profiles

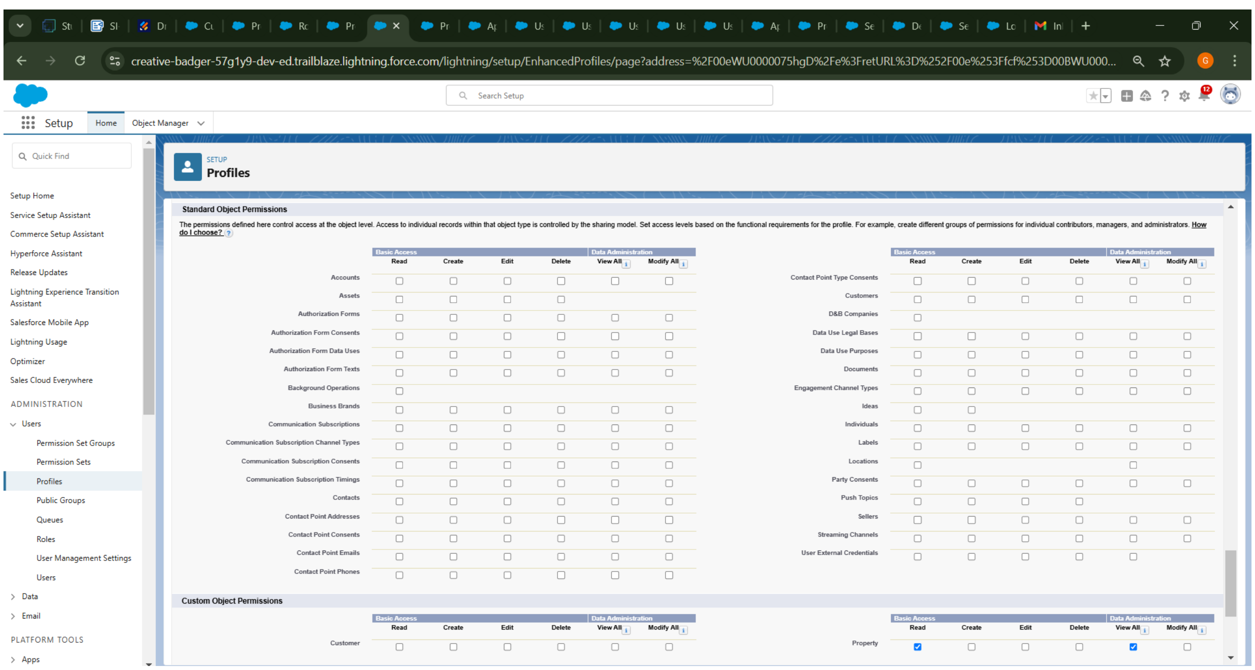
1. From Setup? Go to Profiles and Clone (standard pIatform)SaIesforce Platform User and Name it "Customer"..

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

3. so Remove all the Standard Object Permissions

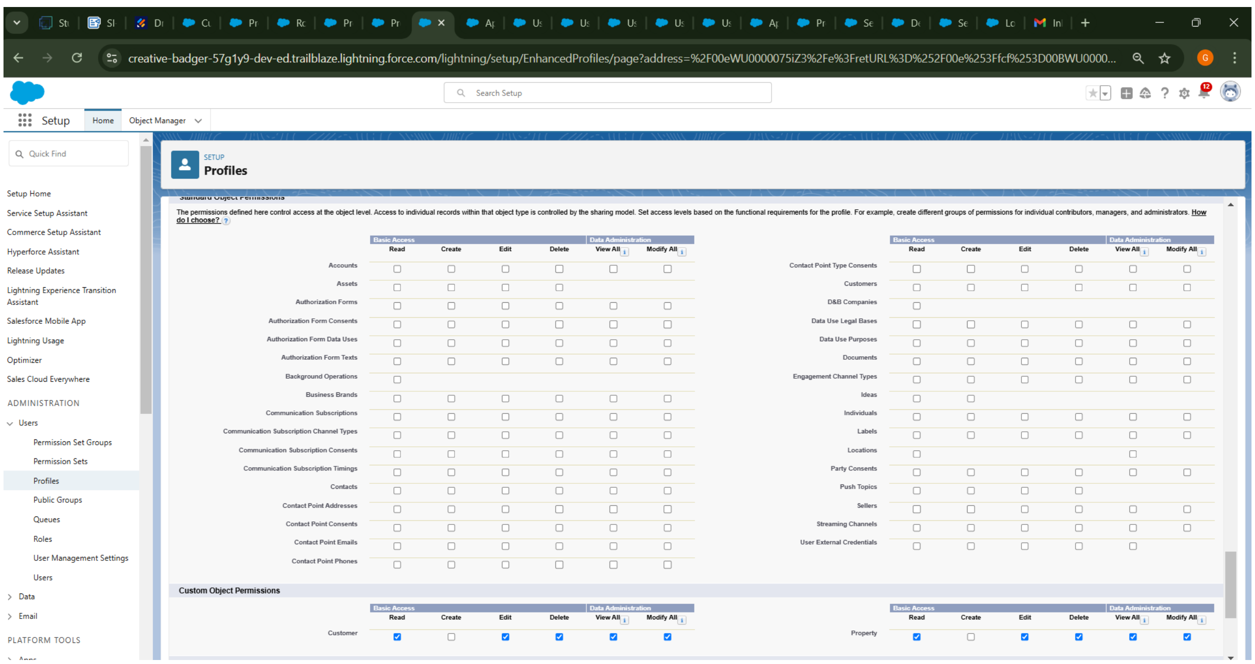
4. Uncheck all the Custom Object Permissions and check read and view all in "Property"

5. make sure every submission object permissions are unselected and then save



Creating Manager Profiles :-

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.
3. Also Remove all the Standard Object Permissions.
4. Uncheck all the Custom Object Permissions and check only "modify all" from "Property" and "Customer."

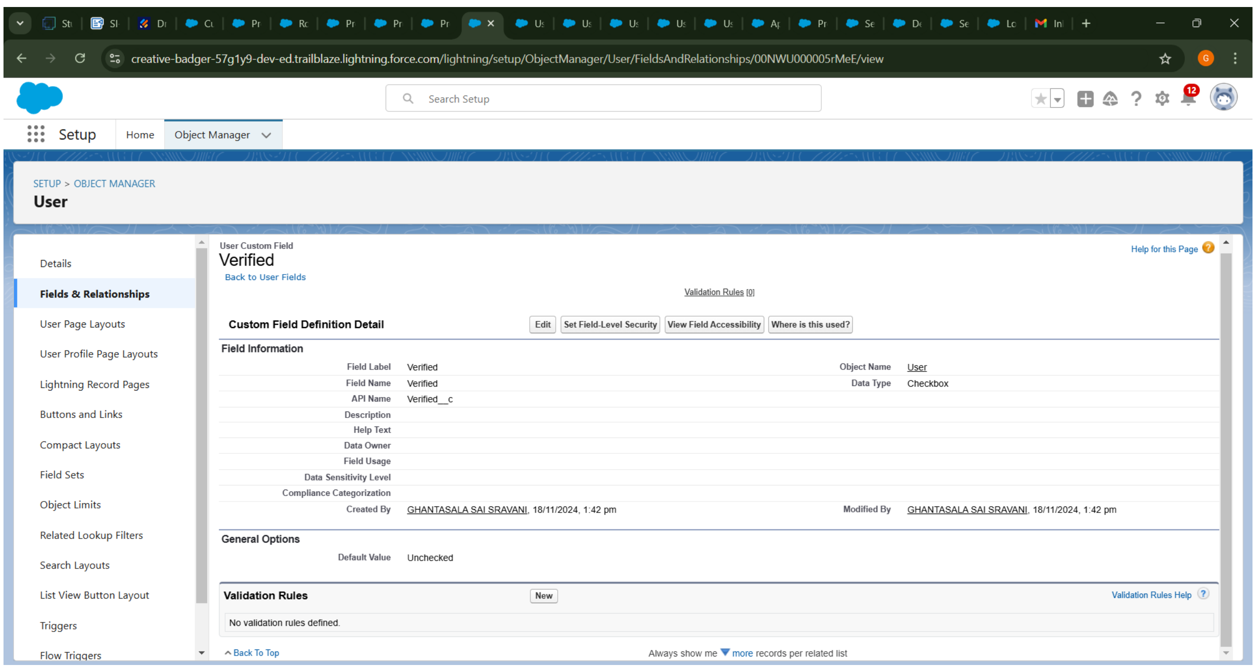


Create a Check Box field on user

Create a Field on the User as per the business requirement.

Activity:- 1

1. Setup >> Object Manager >> Search for User >> Fields and Relationships
2. select the Data type "Check Box"
3. Create a new Field Named as "Verified"



Create Users

Create three different users with three different Roles and profiles, as we have mentioned above. Here, we are going to create four users

User : 1

1. Go to Setup --> Administration --› Users --> New User
2. Last Name - Executive
3. Role - Sales Executive
4. License - Salesforce
5. Profile - System Administrator
6. Save

User : 2

1. Go to Setup > Administration >› Users ›> New User
2. Last Name >> Manager
3. Role >> Sales Manager
4. License >> Salesforce Platform
5. Profile >> Manager
6. Save

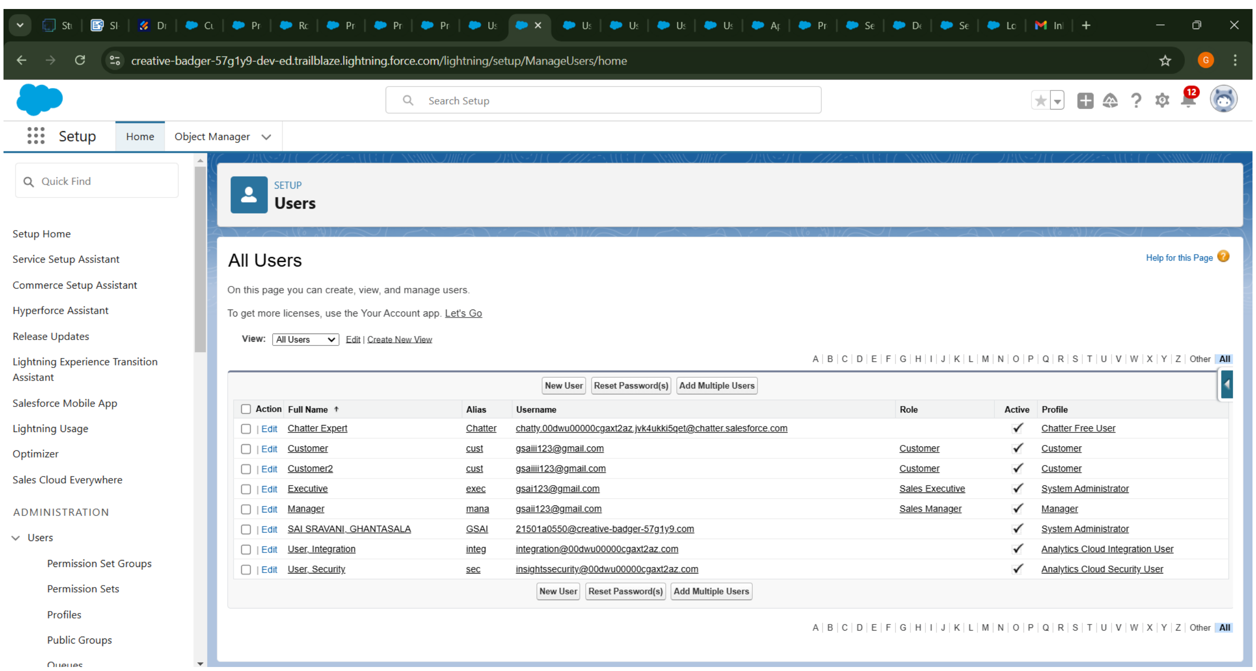
User : 3

1. Go to Setup »> Administration »> Users »> New User
2. Last Name » Customer
3. Role >> Customer
4. License »> Salesforce Platform
5. Profile »> Customer
6. Ensure the verified check box is "Unchecked"

7. Save

User : 4

1. Go to Setup »> Administration >> Users >> New User
2. Last Name >> Customer2
3. Role >» Customer
4. License >> Salesforce Platform
5. Profile »> Customer
6. Ensure the verified check box is "checked"
7. Save



Create an Approval Process for Property Object

An Approval process to approve or reject the records as according

Activity1

1. From Setup >> Process Automation > Approval Process
2. before proceeding, we need to select property in the Ten Manage Approval process
3. Process Name - Property Approval
4. select 2 standard -
5. Location- i not equal to- blank,
6. Verified- Equals- false
7. Click next and “Next Automated Approver Determined By” Select Manager
8. From Record Edit ability Properties >> Click on AdministratorsoRthe currently assigned approver can edit records during the approval process.
9. FromStep 5. Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.

1. Click Next and Select the initial Submitters »
2. Owner >> Property Owner
3. Roles >> Sales Manager
4. Save.

after saving, we are directed to approval steps, and we need to do as follows: Add an approval step
name "Executive Approval ”
click next and select the Approver as ”Sales Executive” and "Save" Add One field Update
as "Verified Property"

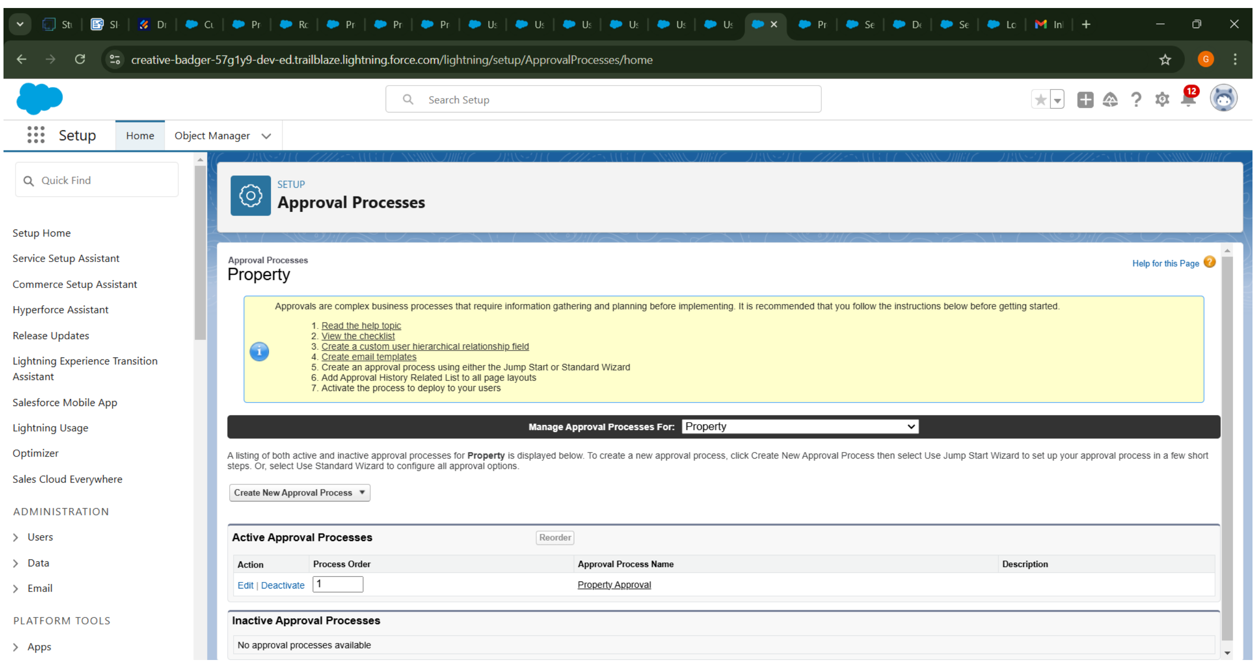
1. Select Object »Property
2. Field to Update >> Verified
3. Field Data Type >» CheckBox
4. Select CheckBox Option as "True"

5. Save.

Add One field Update as "UnVerified Property"

1. Select Object » Property
2. Field to Update >» Verified
3. Field Data Type >» CheckBox
4. Select CheckBox Option as "False"
5. Save.

Activate the Approval Process.



Create a Record trigger ñow to submit the Approval Process Automatically

A flow that can submit the records directly for approval

Activity1

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

ii. Select Object >> Property

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

iv. Set Entry Conditions >> “None”

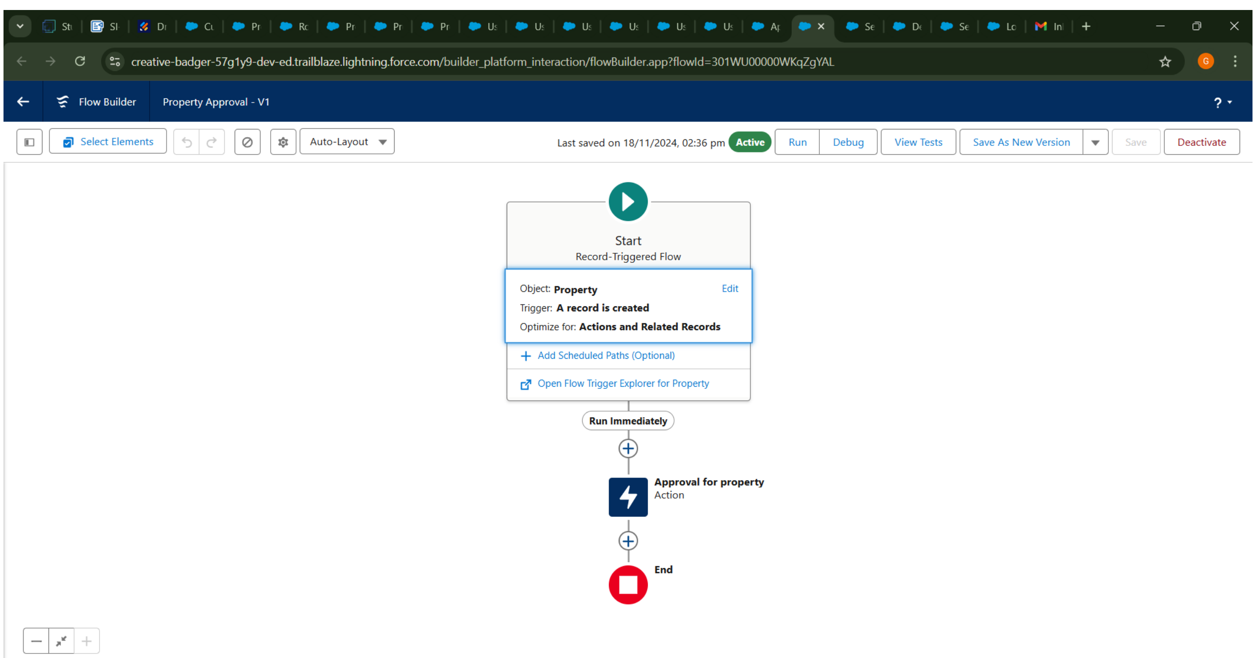
v. Add an “Action” >> “Submit for Approval”

vi. Give Label >> Approval for property

vii. Record Id >> (!SRecord.Id)

viii. Done

Save the Flow and Give label as “Property Approval” and “Activate”

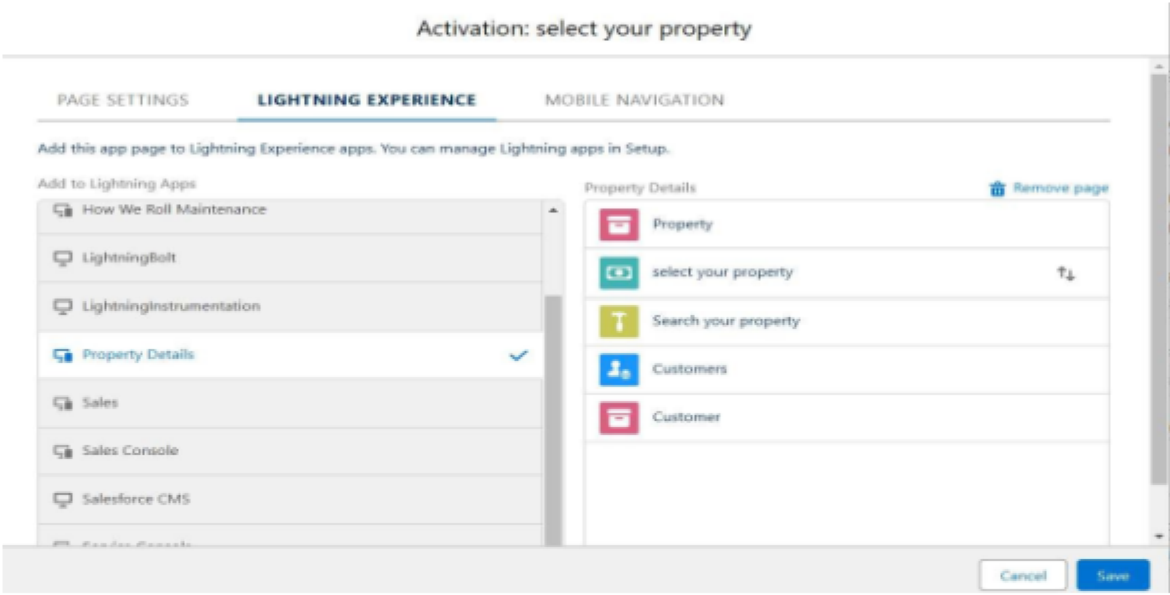


Create an App Page

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

Activity1

1. From Setup »Go to Lightning App Builder >> Click on New >> Select App Page and
2. Click on Next.
3. Give Label as “Search your Property” click “Next”.
4. Click on “header and Left Sidebar”   and Click on “Done”
5. Click on “Save ”and then click on “Activate”.
6. From Page Settings, select page activation as “Activate for all Users”.
7. From Lightning Experience Click on “Property Details” and click on Add Page“.
8. Then Click on “Save”


Activation: select your property
PAGE SETTINGS
LIGHTNING EXPERIENCE
MOBILE NAVIGATION
Add this app page to Lightning Experience apps. You can manage Lightning apps in Setup.
Add to Lightning Apps
How We Roll Maintenance
LightningBolt
LightningInstrumentation
Property Details
Sales
Sales Console
Salesforce CMS
Property Details
Remove page
Property
select your property
Search your property
Customers
Customer
Cancel
Save

Create a LWC Component

i. 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”

Activity1

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

Code: -

public class PropertHandler_LWC (

@AuraEnabled(cacheable=true)

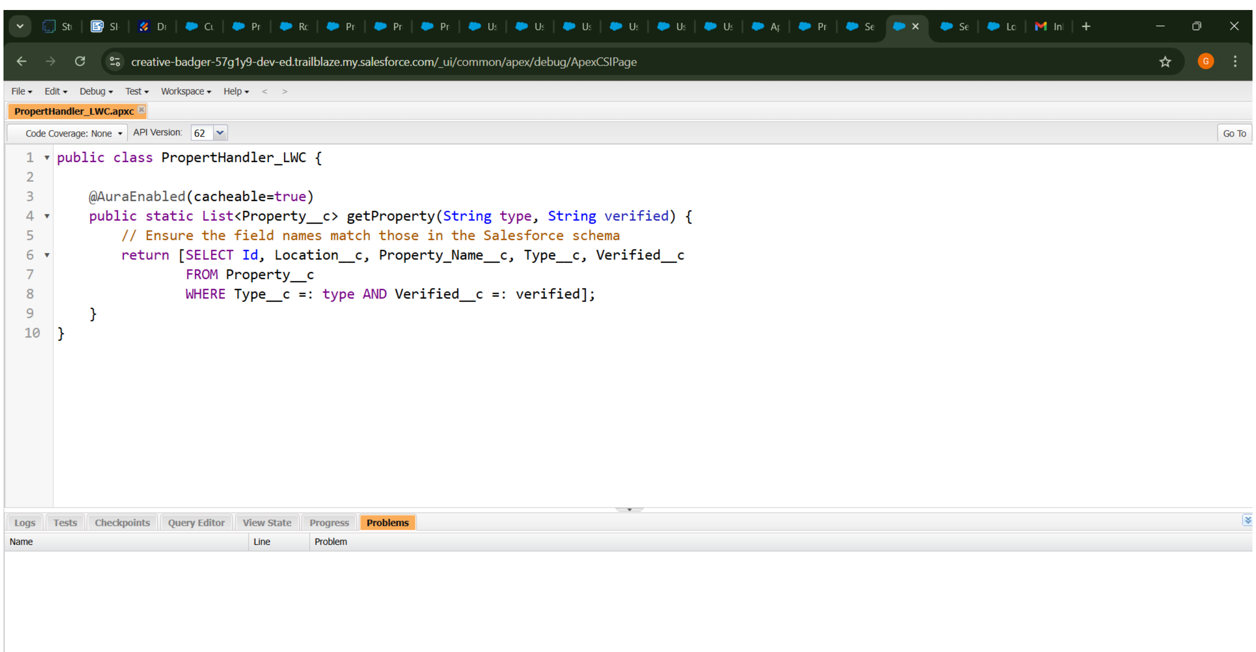
public static List<Property> getProperty(String type, Boolean verified) (String

verified = verified ? 'true' : 'false' // Convert Boolean to string return [SELECT Id,

Location c, Property_Namec, Type c, Verified c

FROM Property c

WHERE Type c = :type AND Verified c = :verifiedStr];



1. Create a Lightning Web Component in your VsCode, and (ctrl+shift +P) and click on authorize an org.

2. Enter your login id and password to authorize your system.

3. Now (ctrl+shift +P) and Create a lightning Web Component and Name it Anything you want to. (Example -

4. In your Html File, Write this code : -

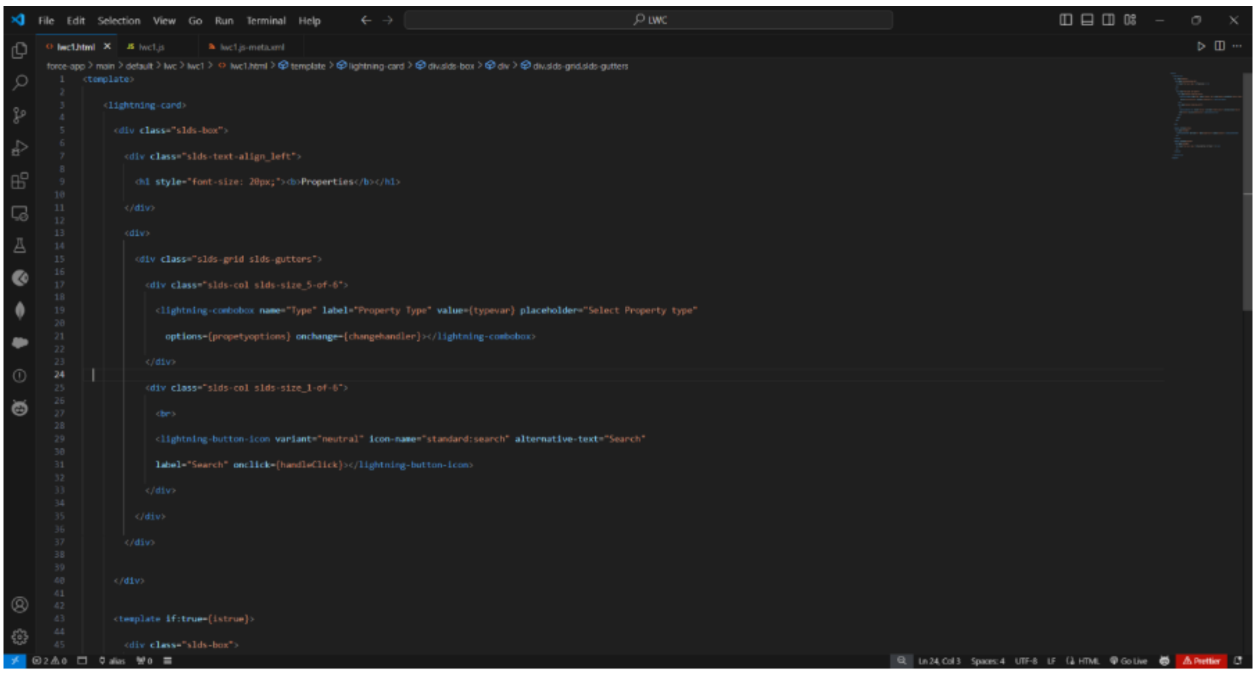
Code :

```
<templIate>
  <Iightning-card>
    <div class="sIds-box">
      <div class="sIds-text-aIign_Ieft">
        <h1 styIe="font-size: 20px;"><b>Properties</b></h1>
      </div>
      <div>
        <div cIass="sIds-grid sIds-gutters">
          <div class=”sIds-col sIds-size_5-of-6“>
                              <lightning-combobox name="Type" IabeI="Property Type" value=(typevar}
pIacehoIder="SeIect Property type”
            options=(propetyoptions} onchange=(changehandIer}></lightning-combobox>
          </div>
          <div class=”sIds-col sIds-size_1-of-6”>
            <bar>
                      <Iightning-button-icon variant=”neutraI" icon-name=”standard:search" alternate-text="Search"
            IabeI="Search" onclick=(handleCIick}></lightning-button-icon>
          </div>
        </div>
      </div>

    </div>

    <tempIate if:true=(istrue)>
      <div class="sIds-box">
```

```
        <lightning-datatable key-fieId="id" data=(propertyIist} columns=(coIumns}></Iightning-
datatabIe>
     </div>
   </templates
   <tempIate if:false=(isfalse}>
     <div class="sIds-box">
      <div styIe="font-size: 15px;"><b>No properties Are Found !!</b></div>
     </div>
   </template›
  </lightning-card>
</templates>
```



1. In Your Js File, write this code : -

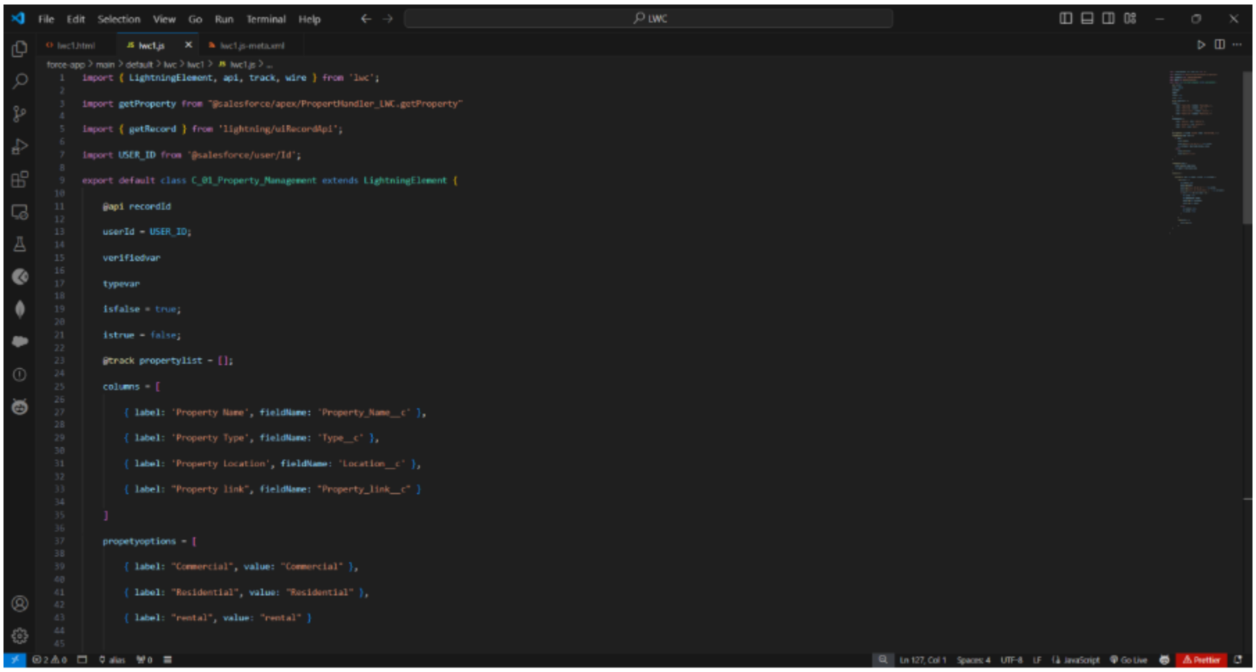
Code :-

```
import ( LightningElement, api, track, wire ) from 'Iwc';
import getProperty from "@salesforce/apex/PropertHandIer_LWC.getProperty"
import ( getRecord } from 'lightning/uiRecordApi'; import USER
ID from '@salesforce/user/Id';
export default class C 01_Property_M management extends LightningElement ( @api recorded
   user = USER_ID; verified
```

```
var  type var
is false = true; is true
= false;
@track property list  = [];
columns = [
   ( label: 'Property Name', fieldName: 'Property_Name   c' ), ( label:
   'Property Type', fieldName: 'Type   c' ),
   ( label: 'Property Location', fieldName: 'Locationc' ), ( label:
   "Property link", fieldName: "Property  link   c" }
proportions = [
   ( label: "Commercial", value: "Commercial" }, ( label:
   "Residential", value: "Residential" ),
   ( label: "rental", value: "rental" }

@wire(getRecord, ( recorded: "$user", fields: ['User.Verified   c'] )) recordFunction(( data,
error }) (
   if (data) ( console.log(data)
      console.log("This is the User Id ---> "+this.userId);
      this.verifiedvar = data.fields.Verified   c.value;
   } else (
      console.error(error)
      console.log('this is error')
changehandIer(event) (
   console.log(event.target.value); this.typevar =
   event.target.value;
handleClick() {
   getProperty(( type: this.typevar, verified: this.verifiedvar ))
      .then((result) => ( this.isfaIse =
         true; console.log(result)
         console.log('This is the User id ---> ' + this.userId);
         console.log('This is the verified values ---> ' + this.verifiedvar); if (result !=
         null && != 0) (
            this.istrue = true; this.propertyIist =
            result; console.log(this.verifiedvar);
            console.log(this.typevar)
         ) else (
```

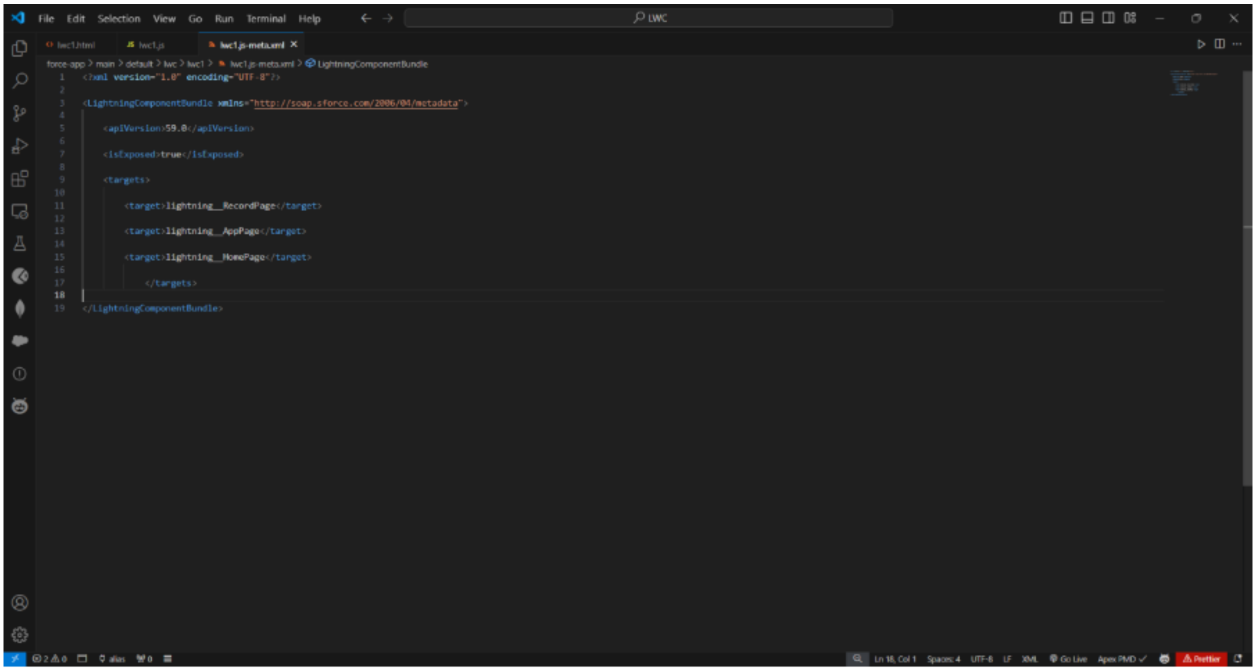
```
        this.isfaIse = false;
        this.istrue = false;
    .catch((error) => (
      console.log(error)
```



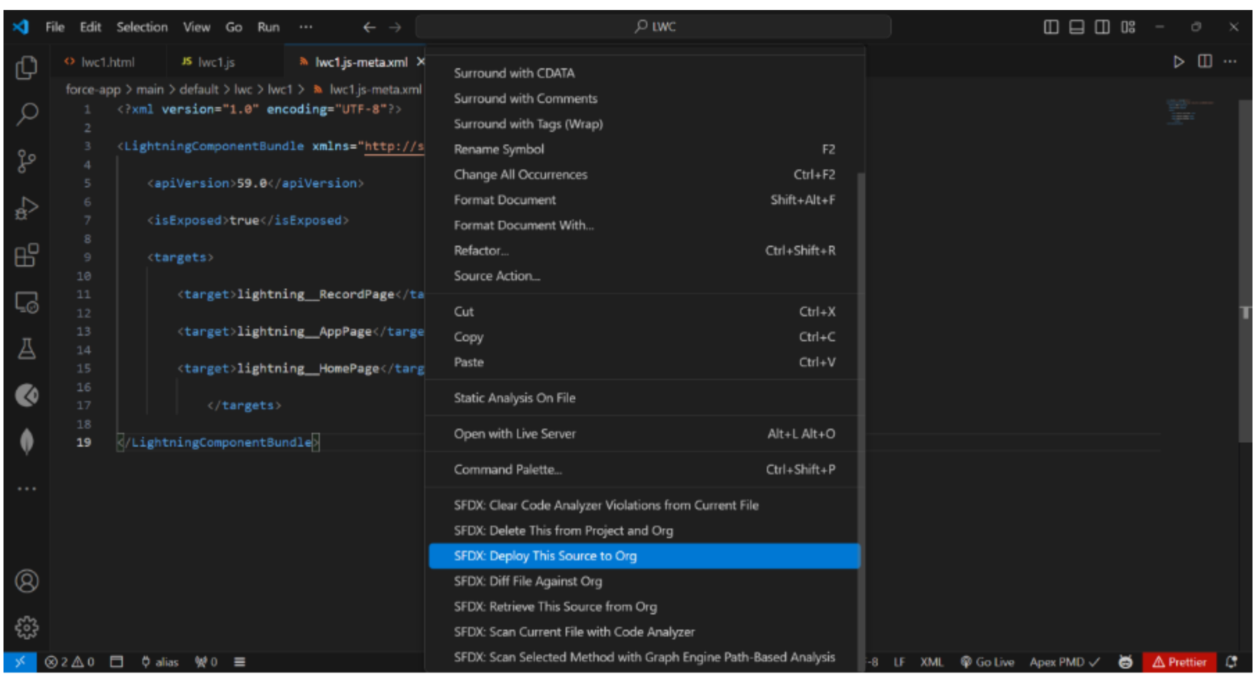
1. In Your metafile, give your targets to deploy the component.

Code :

```
<?xmI version="1.0" encoding="UTF-8"?>
<LightningComponentBundIe xmlns="http://soap.sforce.com/2006/04/metadata">
    <apiVersion>59.0</apiVersion>
    <isExposed>true</isExposed>
    <targets>
        <target>Lightning__RecordPage</targets
        <target>Lightning__AppPage</targets
        <target>Lightning__HomePage</targets
            </targets>
</LightningComponentBundIe>
```



After Saving all the three Codes, Right Click and deploy this component to the organization



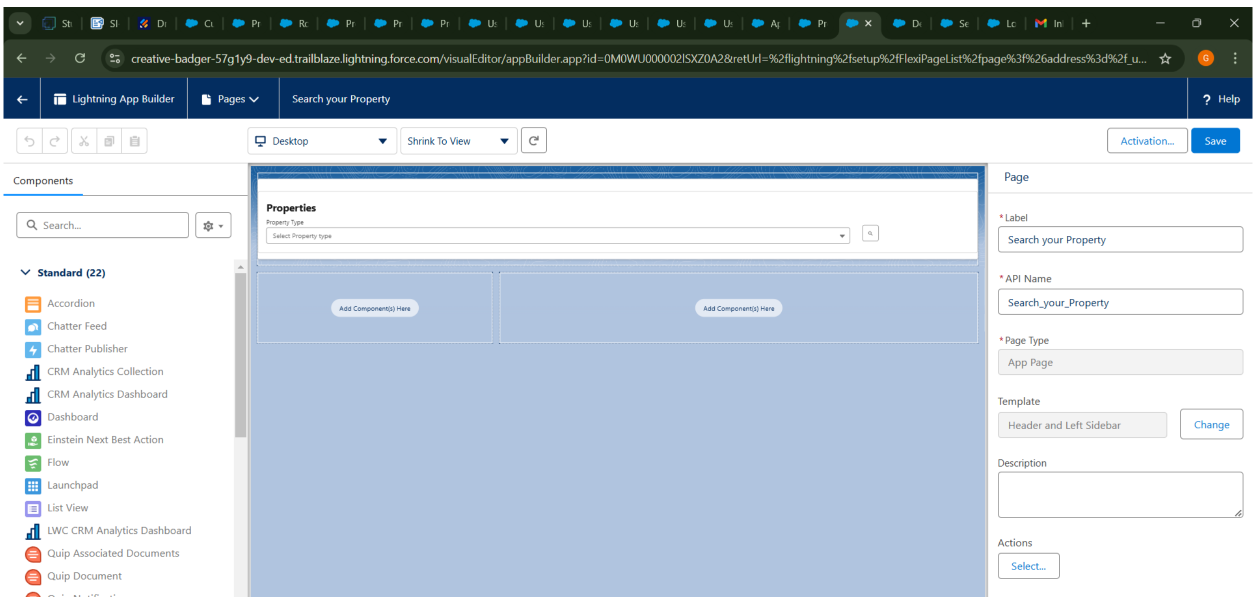
Drag this Component to your App Page

Adding the Component to your Page

Activity1

1. From Setup >> Go to App Launcher >> Search for Property Details
2. On this Page, click on the gear icon and click on Edit Page
3. after clicking on the edit page, it will one directed to app pages then

3. Drag the Component(properties) to your App Page and Save the Page.



Give Access of Apex Classes to Profiles

The Apex Class has a Security, Enable the protection for the profiles that need to access this class.

1. Activity1

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

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