

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

Use Story :

Dreams World Properties is embarking on a transformative journey by integrating Salesforce into their business operations to streamline customer interactions. With the aim of enhancing user experience and efficiency, the company seeks to automate its processes seamlessly. One of the primary objectives is to establish a seamless connection between their website and Salesforce platform.

Upon a customer expressing interest on the website, an automated system will trigger the creation of a corresponding record within the Salesforce database. This record will serve as a comprehensive profile capturing essential details about the prospective customer and their expressed preferences.

Furthermore, Through Salesforce's robust capabilities, Dreams World Properties intends to categorize users into two distinct categories: approved and non-approved. Approved users will enjoy privileged access to a curated selection of properties tailored to their preferences and requirements. On the other hand, non-approved users will still have access to a broader range of property listings but may not benefit from the personalized experience offered to approved users.

Project Overview : -

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.

Project Flow:

Milestone 1 : Create a jotform and integrate it with the org to create records automatically
Milestone 2 : Create Objects from Spreadsheet
Milestone 3 : Integrate Jotform with Salesforce Platform
Milestone 4 : Create Roles
Milestone 5 : Create a Property Details App
Milestone 6 : Create Profiles
Milestone 7 : Create a Checkbox Field on User
Milestone 8 : Create Users
Milestone 9 : Create an Approval Process for Property Object
Milestone 10 : Create a Record trigger flow to submit the Approval Process Automatically.
Milestone 11 : Create an App Page
Milestone 11 : Create an LWC Component
Milestone 11 : Drag this Component To Your App Page

Requirements : -

1) Website Integration Requirements :

Implement a form on the website for users to express interest in property listings.
Ensure the form captures essential details such as name, contact information, preferred property type, location, budget, etc. Set up validation rules to ensure data accuracy and completeness.
Integrate the form submission process with Salesforce.

2) Salesforce Configuration Requirements :

Set up Salesforce objects and fields to store customer data. This includes fields for name, contact information, preferences, approval status, etc. Define workflows or processes to automate the creation of records when a user submits the form on the website.
Implement validation rules and data integrity checks to maintain data quality.
Configure Salesforce security settings to control access to customer records based on approval status.

3) Approval Process Requirements :

Define criteria for categorizing users as approved or non-approved based on specific parameters such as budget, property preferences, etc. Implement an approval process in Salesforce to review and approve users. Set up email notifications or alerts to notify relevant stakeholders when a user is approved or rejected. Ensure that approved users are granted access to curated property listings tailored to their preferences.

4) User Experience Requirements:

Design user interfaces in Salesforce for managing customer records, approval processes, and property listings. Ensure a seamless user experience for both customers and internal users interacting with Salesforce. Provide training and documentation for internal staff on how to use the Salesforce system effectively.

5) Integration Testing and Quality Assurance Requirements:

Conduct thorough testing of the integration between the website and Salesforce to ensure data is accurately captured and transferred. Perform end-to-end testing of the approval process to verify that users are categorized correctly and granted appropriate access. Identify and resolve any issues or bugs encountered during testing.

6) Scalability and Performance Requirements:

Ensure that the integration and Salesforce configuration are scalable to accommodate future growth in customer volume and data. Optimize system performance to ensure responsiveness and reliability, especially during peak usage periods.

7) Documentation and Maintenance Requirements:

Document the integration architecture, data flows, and configuration details for future reference. Establish procedures for ongoing maintenance and updates to the integration and Salesforce configuration. Provide ongoing support and training for users to address any issues or questions that may arise.

What you'll learn

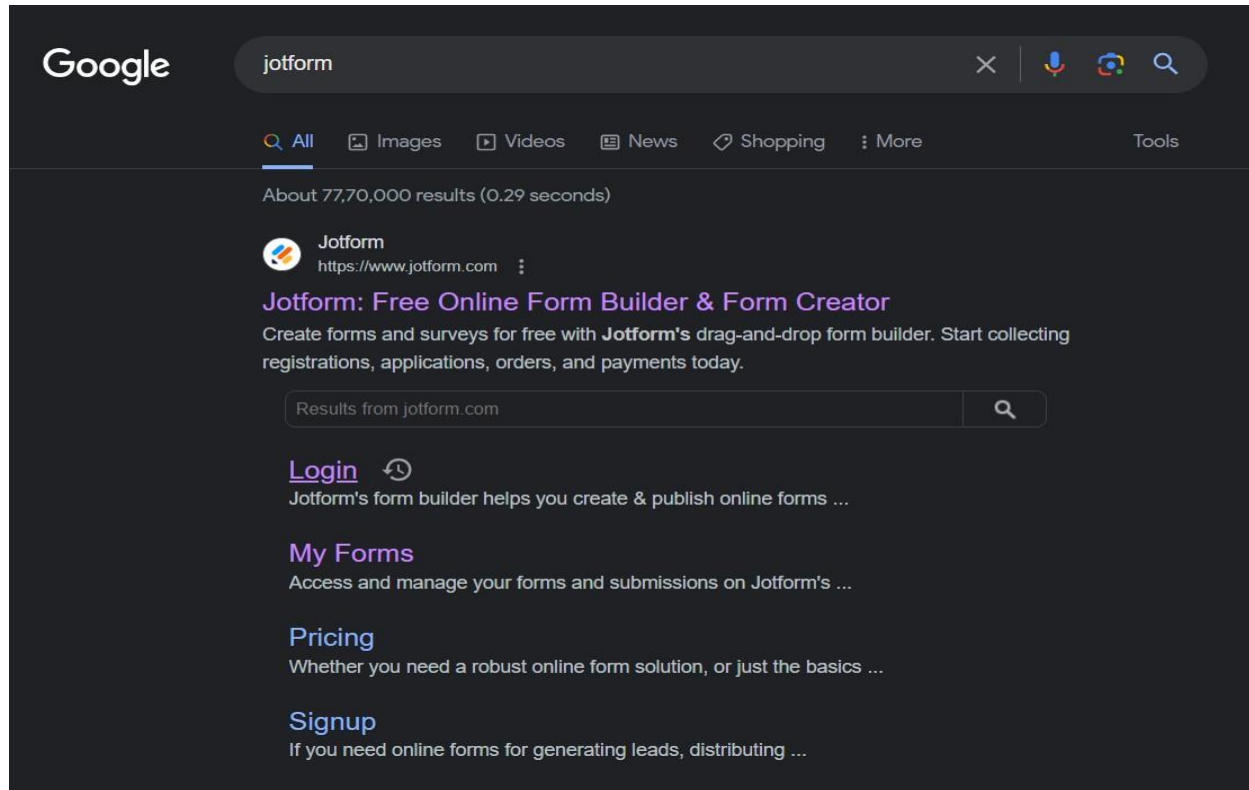
1. Real Time Salesforce Project
2. Object & Fields
3. Integration Through Jotform
4. Roles
5. Application Management
6. Profiles
7. User Management
8. Approval Process
9. Flows
10. LWC Components

After Creating the Salesforce org Start with the First Milestone

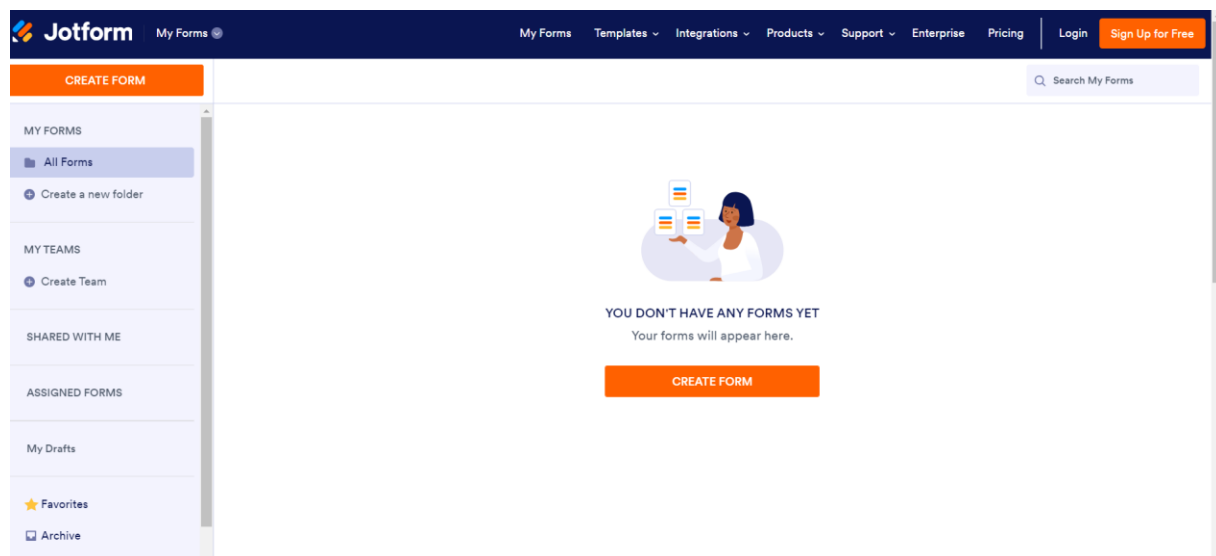
Milestone 1 :- Create a jotform and integrate it with the org to create a record of customers automatically.

USE CASE : - 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 org.

- 1) Open your browser and search for jotform and log in.




2) After login click on create form and click on start from scratch



- 3) Now create a form to get the customer details like Name, Phone, Email, Address and type of property the customer is interested in.

Dreams World
Last edited yesterday 12:00

BUILD SETTINGS PUBLISH



Dreams World

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

Submit

+ ADD NEW PAGE HERE

If you want to remove Jotform Branding, [please upgrade your account](#)

 **Jotform**

Now create your own Jotforms - It's Free

Create your own Jotform

- 4) Once the form is created, publish it by clicking on publish.

<https://www.jotform.com/form/240031134484041>

Milestone 2 :- Create Objects from Spreadsheet.

- **Create 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](#)
- 4) After downloading, upload the file, map the fields and upload to create an object.

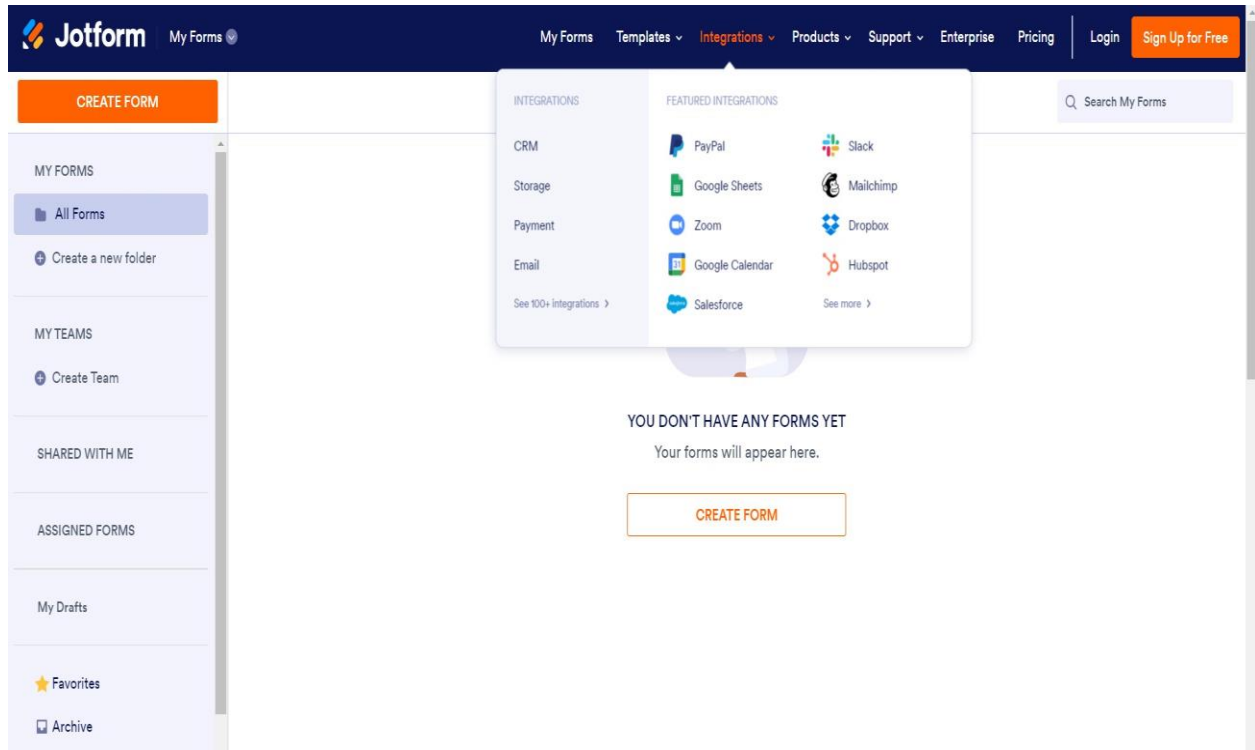
- **Create Property object**

- 1) Follow the same from the customer object to create the Property Object
- 2) [Property](#)

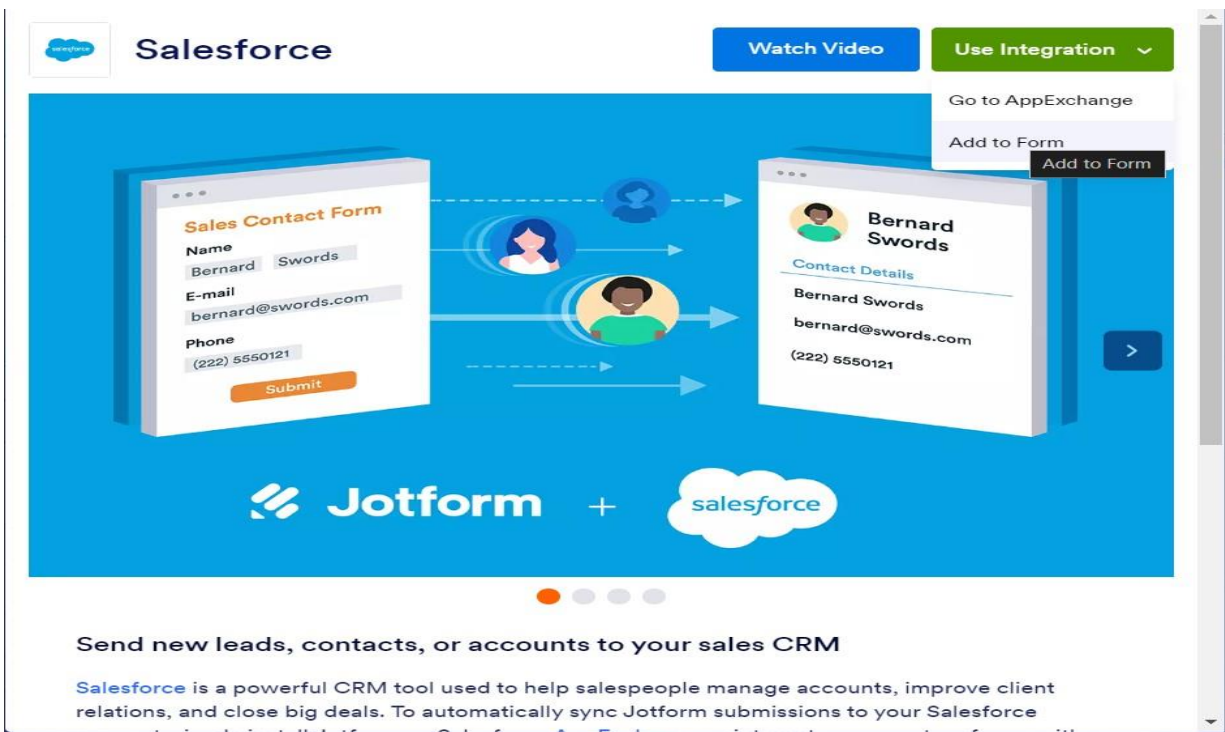
Milestone 3 : - Integrate Jotform with Salesforce Platform

]

- 1) On the Jotform Platform, Click on Integration and choose Salesforce.



2) Click on User Integration and choose “Add to From”.



3) Select the Org with which you want to Integrate your jotform with.

The screenshot shows the Jotform Form Builder interface for a form named "Dreams World". The left sidebar contains navigation options: FORM SETTINGS, EMAILS, CONDITIONS, THANK YOU PAGE, INTEGRATIONS (selected), APPROVAL FLOWS, JOTFORM SIGN, and MOBILE NOTIFICATIONS. The top navigation bar includes BUILD, SETTINGS, and PUBLISH tabs. The main content area displays the "Salesforce via this handy integration" section. It includes a list of actions: Add new company leads, Add new contacts, Add new accounts, and Connect any custom object. Below this, there is a section for "Authentication" where a Salesforce account is selected from a dropdown menu. The selected account is "dada rao - prajwal@thesmartbridge.com". A "Send Feedback" button is located at the bottom right.

4) Select an Action - Create a record.
Select a Salesforce Object : - Customer

The screenshot shows the Jotform Form Builder interface for the "Create a record" action. The left sidebar is the same as in the previous screenshot. The top navigation bar includes BUILD, SETTINGS, and PUBLISH tabs. The main content area displays the "Create a record" section, which is selected. Below this, there is a section for "Select a Salesforce Object" where "Customer" is selected from a dropdown menu. The "Object Fields" section shows two fields selected: "Select field" and "Select field". The "Update an existing record" section is visible at the bottom, with a toggle switch set to "OFF". A "Send Feedback" button is located at the bottom right.

5) Map Each and every field on the Object with the fields on the form and “Save Action”.

The screenshot shows a mapping interface titled "Create a record" with the subtitle "Send data from form fields to matched Salesforce fields". It features two columns: "Object Fields" and "Dreams World".

Object Fields	Dreams World
Customer	Name - First Name
City	Address - City
Budget Amount	Budget Amount
Property Type	Which type of Property ar...
Phone Number	Phone Number
Street Address	Address - Street Address
Email	Email
Customer Name	Name - Last Name
State	Address - State
Street Address line 2	Address - Street Address 2

At the bottom, there is a "+ Add Field" button.

6) Then “Save the Integration” and “Finish”.

The screenshot shows a summary screen for the "SALESFORCE" integration. It includes a back arrow, the Salesforce logo, and the text "Send new leads, contacts, or accounts to your sales CRM".

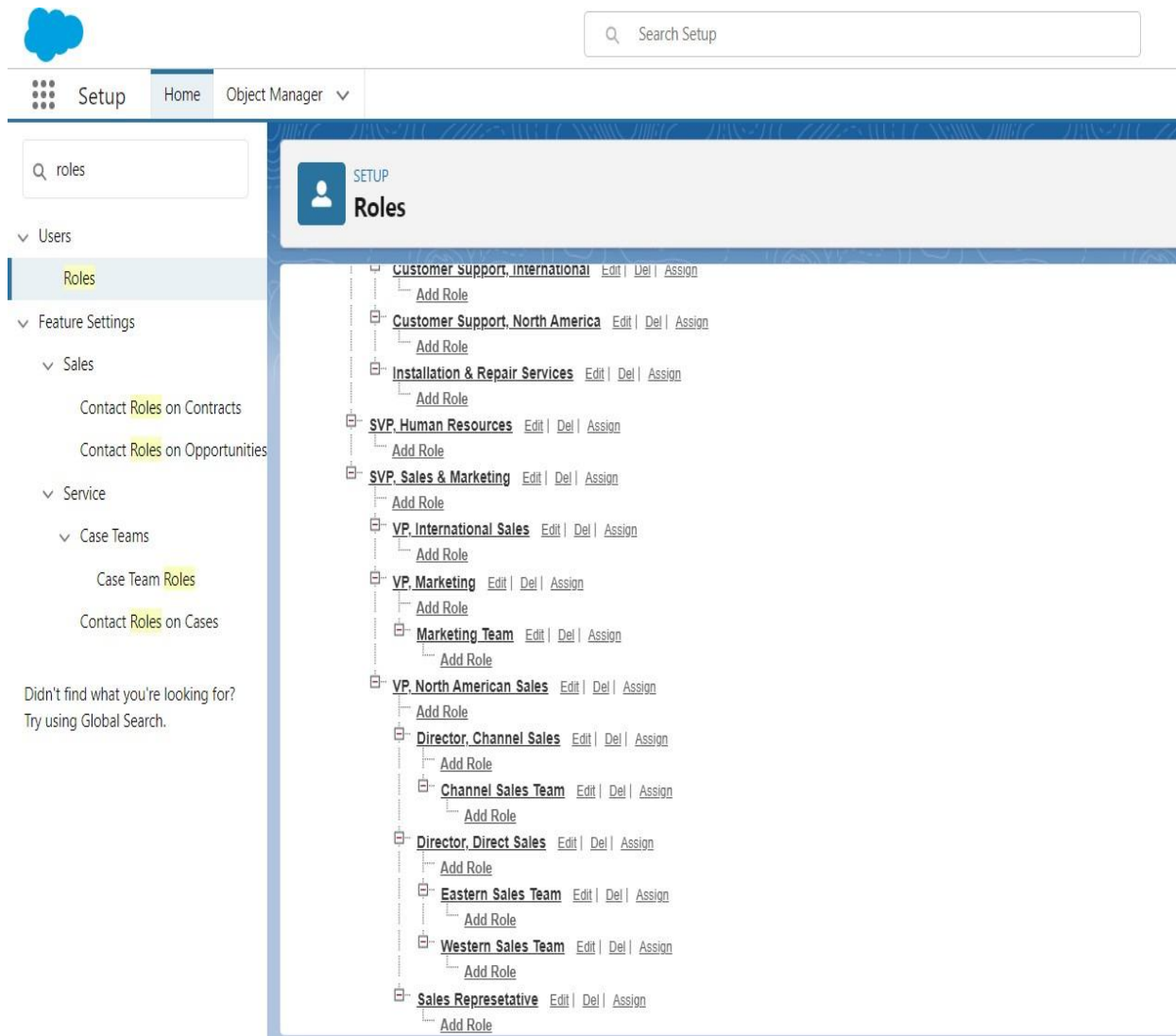
Below this, there is a section titled "All Actions" with a "See Action Logs" link and a "+ Add New Action" button. A list of actions is shown, with the first one being "1 Create a record Customer".

At the bottom, there are two buttons: "CANCEL" and "SAVE INTEGRATION".

Milestone 4 : Create Roles

- **Sales Executive Role**

1) Go to Setup and Click on Roles, then click on Expand all and Add a Role just below the Sales Representative



The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager". The left sidebar shows a search bar with "roles" entered, and a list of categories: "Users", "Roles" (highlighted), "Feature Settings", "Sales", "Service", and "Case Teams". Under "Sales", there are links for "Contact Roles on Contracts" and "Contact Roles on Opportunities". Under "Service", there are links for "Case Team Roles" and "Contact Roles on Cases". The main content area is titled "Roles" and displays a hierarchical list of roles. The roles are organized into a tree structure with expand/collapse icons. The roles listed are: "Customer Support, International", "Customer Support, North America", "Installation & Repair Services", "SVP, Human Resources", "SVP, Sales & Marketing", "VP, International Sales", "VP, Marketing", "Marketing Team", "VP, North American Sales", "Director, Channel Sales", "Channel Sales Team", "Director, Direct Sales", "Eastern Sales Team", "Western Sales Team", and "Sales Representative". Each role has an "Add Role" link below it. The "Sales Representative" role is at the bottom of the list.

* It will use the “System Administrator Profile”.

- 2) Label - Sales Executive
Reports to - Sales Representative

The screenshot shows a web-based interface for setting up roles. At the top, there is a header bar with a blue icon of a person and the text 'SETUP Roles'. Below this, the main content area is titled 'Role Edit' and 'New Role'. The form itself is titled 'Role Edit' and contains four input fields: 'Label' with the value 'Sales Executive', 'Role Name' with the value 'Sales Executive' and an information icon, 'This role reports to' with the value 'Sales Representative' and a search icon, and 'Role Name as displayed on reports' which is empty. At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

Role Edit	
Label	<input type="text" value="Sales Executive"/>
Role Name	<input type="text" value="Sales Executive"/> ⓘ
This role reports to	<input type="text" value="Sales Representative"/> 🔍
Role Name as displayed on reports	<input type="text"/>

- *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.*

Milestone 5 : - Create a Property Details App

- 1) From Setup —> Go to App Manager and click on New Lightning App and Name it as “Property Details” and add “Customer” and “Property” Object.

New Lightning App

App Details & Branding

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

App Details

*App Name ⓘ
Search Your Property

*Developer Name ⓘ
Search_Your_Property

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex Value ⓘ
#AAE420

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

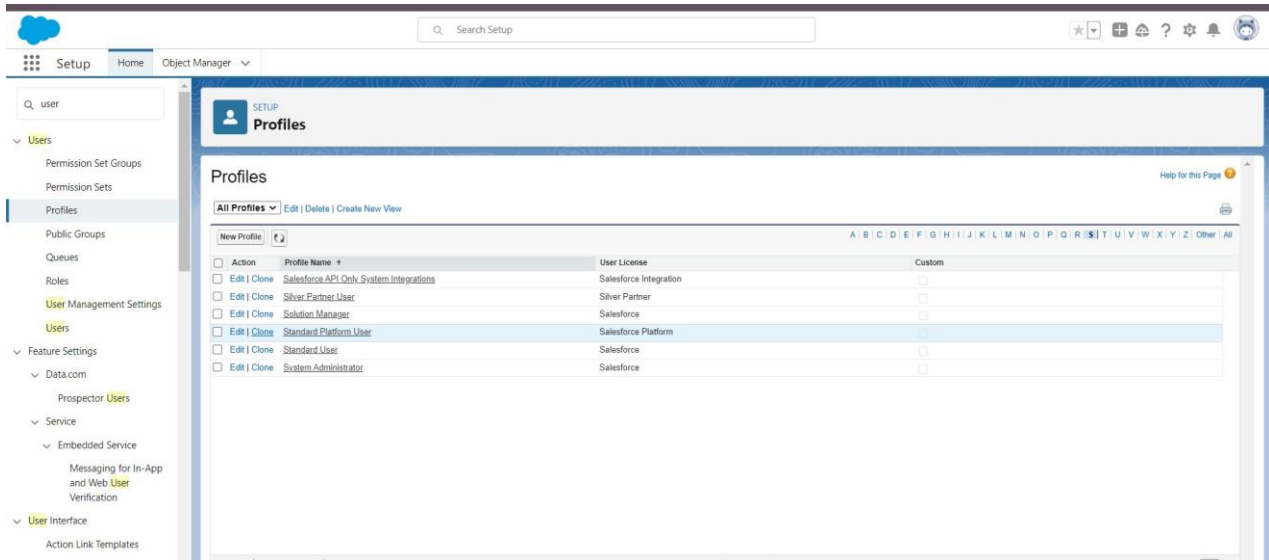
Next

- 2) Click Next→ Next → Save and Add “System Admin ”Profile.

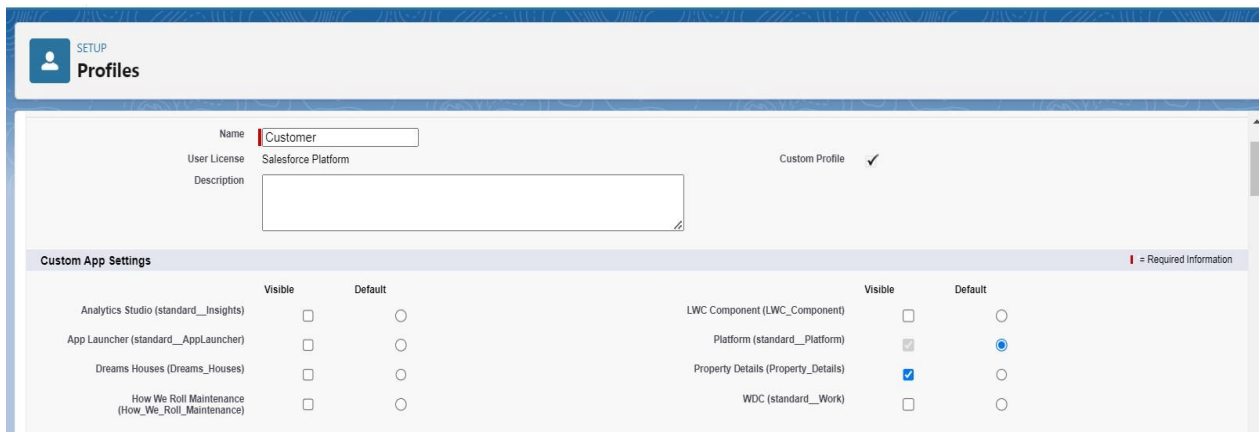
Milestone 6 : - Create Profiles

- **Customer : -**

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



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



3) Also Remove all the Standard Object Permissions.

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

[illegible]

- 4) Uncheck all the Custom Object Permissions and check read and view all in “Property”

[illegible]

- **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.

SETUP
Profiles

Set the permissions and page layouts for this profile.

Profile Edit [Save] [Save & New] [Cancel]

Name: Manager
User License: Salesforce Platform
Description: [Text Area]
Custom Profile: ☒

Custom App Settings I = Required Information

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	LWC Component (LWC_Component)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Dreams Houses (Dreams_Houses)	<input type="checkbox"/>	<input type="radio"/>	Property Details (Property_Details)	<input checked="" type="checkbox"/>	<input type="radio"/>
How We Roll Maintenance (How_We_Roll_Maintenance)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

- 3) Also Remove all the Standard Object Permissions.
- 4) Uncheck all the Custom Object Permissions and check only “modify all” from “Property” and “Customer”

SETUP

Profiles

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
error logs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Property	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Sales orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vehicles	<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

☐

Milestone 7 : - Create a CheckBox field on user

- 1) Setup → Object Manager → Search for User → Fields and Relationships
- 2) Create new Field Named as “Verified” as Data type “CheckBox”

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

User

Details

Fields & Relationships

User Page Layouts

User Profile Page Layouts

Lightning Record Pages

Buttons and Links

Compact Layouts

Field Sets

Object Limits

Related Lookup Filters

Search Layouts

List View Button Layout

Triggers

Flow Triggers

Validation Rules

User Custom Field

Verified

Back to User Fields

Validation Rules

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

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	data_rag	31/01/2024, 11:22 am	Modified By
			data_rag, 31/01/2024, 11:22 am

General Options

Default Value	Unchecked
---------------	-----------

Validation Rules

No validation rules defined

Back To Top

Always show me more records per related list

Milestone 8 : - Create Users

Create three different users with three different Roles and profiles as we have mentioned above.

User 1 : -

- 1) Go to Setup → Administration → Users → New User
- 2) LastName - 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) LastName - 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) LastName - Customer
- 3) Role - Customer
- 4) License - Salesforce Platform
- 5) Profile - Customer
- 6) Make Sure the verified check box is “Unchecked”
- 7) Save

User 4 : -

- 1) Go to Setup → Administration → Users → New User
- 2) LastName - Customer2
- 3) Role - Customer
- 4) License - Salesforce Platform
- 5) Profile - Customer
- 6) Make Sure the verified check box is “checked”
- 7) Save

Milestone 9 :- Create an Approval Process for Property Object

- 1) From Setup → Process Automation → Approval Process

2) Process Name - Property Approval

SETUP Approval Processes

Approval Process Edit
Property Approval

Step 1 of 6

Enter a name and description for your new approval process.

Enter Name and Description

Process Name: Property Approval

Unique Name: Property_Approval

Description:

Save Next Cancel

3) Give 2 criteria →

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

SETUP Approval Processes

Approval Process Edit
Property Approval

Step 2 of 6

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.

Specify Entry Criteria

Use this approval process if the following criteria are met:

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

Add Filter Logic...

Previous Save Next 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.

SETUP Approval Processes

Approval Process Edit
Property Approval Help for this Page

Step 3. Specify Approver Field and Record Editability Properties Step 3 of 6

Previous Save Next Cancel

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By: Manager +

Use Approver Field of Property Owner: ☐

Record Editability Properties

☐ Administrators **ONLY** can edit records during the approval process.

☒ Administrators **OR** the currently assigned approver can edit records during the approval process.

Previous Save Next Cancel

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

SETUP Approval Processes

Property Approval

Step 5. Select Fields to Display on Approval Page Layout Step 5 of 6

Previous Save Next Cancel

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.

Available Fields		Selected Fields
Created By	Add <input type="button" value="➔"/> <input type="button" value="➔"/> Remove <input type="button" value="➔"/>	Property
Last Modified By		Owner
Property link		Location
Verified		Property Name
		Type

[Click here to view an example](#)

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 ”

Approval Step Edit
VP Approval [Help for this Page](#)

Step 1. Enter Name and Description Step 1 of 3

Save Next Cancel

Enter a name, description, and step number for your new approval step.

Enter Name and Description ! = Required Information

Approval Process Name	Property Approval
Name	VP Approval
Unique Name	VP_Approval
Description	

Save Next Cancel

10) specify the Criteria → All record should enter

Approval Step Edit
VP Approval [Help for this Page](#)

Step 2. Specify Step Criteria Step 2 of 3

Previous Save Next Cancel

Specify whether a record must meet certain criteria before entering this approval step. If these criteria are not met, the approval process can skip to the next step, if one exists. [Learn more](#)

Specify Step Criteria

☒ All records should enter this step.

☐ Enter this step if the following , else .

Previous Save Next Cancel

11) click next and select the Approver as “ Sales Executive “ and “Save”

Approval Step Edit
VP Approval Help for this Page ?

Step 3. Select Assigned Approver Step 3 of 3

[Previous](#) [Save](#) [Cancel](#)

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Select Approver

☐ Let the submitter choose the approver manually.
☐ Automatically assign using the user field selected earlier. **(Manager)**
☐ Automatically assign to queue.
☒ Automatically assign to approver(s).

[Add Row](#) [Remove Row](#)

When multiple approvers are selected:

☒ Approve or reject based on the **FIRST** response.
☐ Require **UNANIMOUS** approval from all selected approvers.

☐ The approver's delegate may also approve this request.

[Previous](#) [Save](#) [Cancel](#)

12) Add One field Update as “Verified Property”

- a) Select Object → Property
- b) Field to Update → Verified
- c) Field Data Type → CheckBox
- d) Select CheckBox Option as “True”
- e) Save.

SETUP
Field Updates

Edit Field Update
Verified Property Help for this Page ?

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit [Save](#) [Save & New](#) [Cancel](#)

Identification ! = Required information

Name
 Unique Name
 Description
 Object
 Field to Update
 Field Data Type
 Re-evaluate Workflow Rules after Field Change ☐

Specify New Field Value

Checkbox Options
☒ True
☐ False

[Save](#) [Save & New](#) [Cancel](#)

13) Add One field Update as “UnVerified Property”

- a) Select Object → Property
- b) Field to Update → Verified
- c) Field Data Type → CheckBox
- d) Select CheckBox Option as “False”
- e) Save.

SETUP
Field Updates

Edit Field Update
Unverified Property

Help for this Page

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Save Save & New Cancel

Identification

Name Unverified Property

Unique Name Unverified_Property

Description

Object Property

Field to Update Property: Verified

Field Data Type Checkbox

Re-evaluate Workflow Rules after Field Change

Specify New Field Value

Checkbox Options

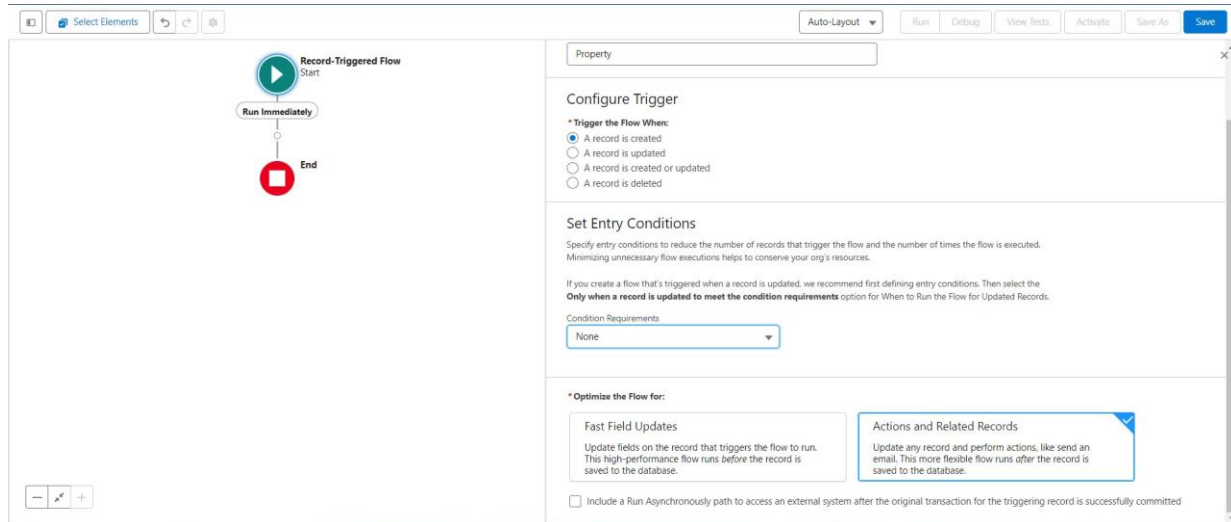
True False

Save Save & New Cancel

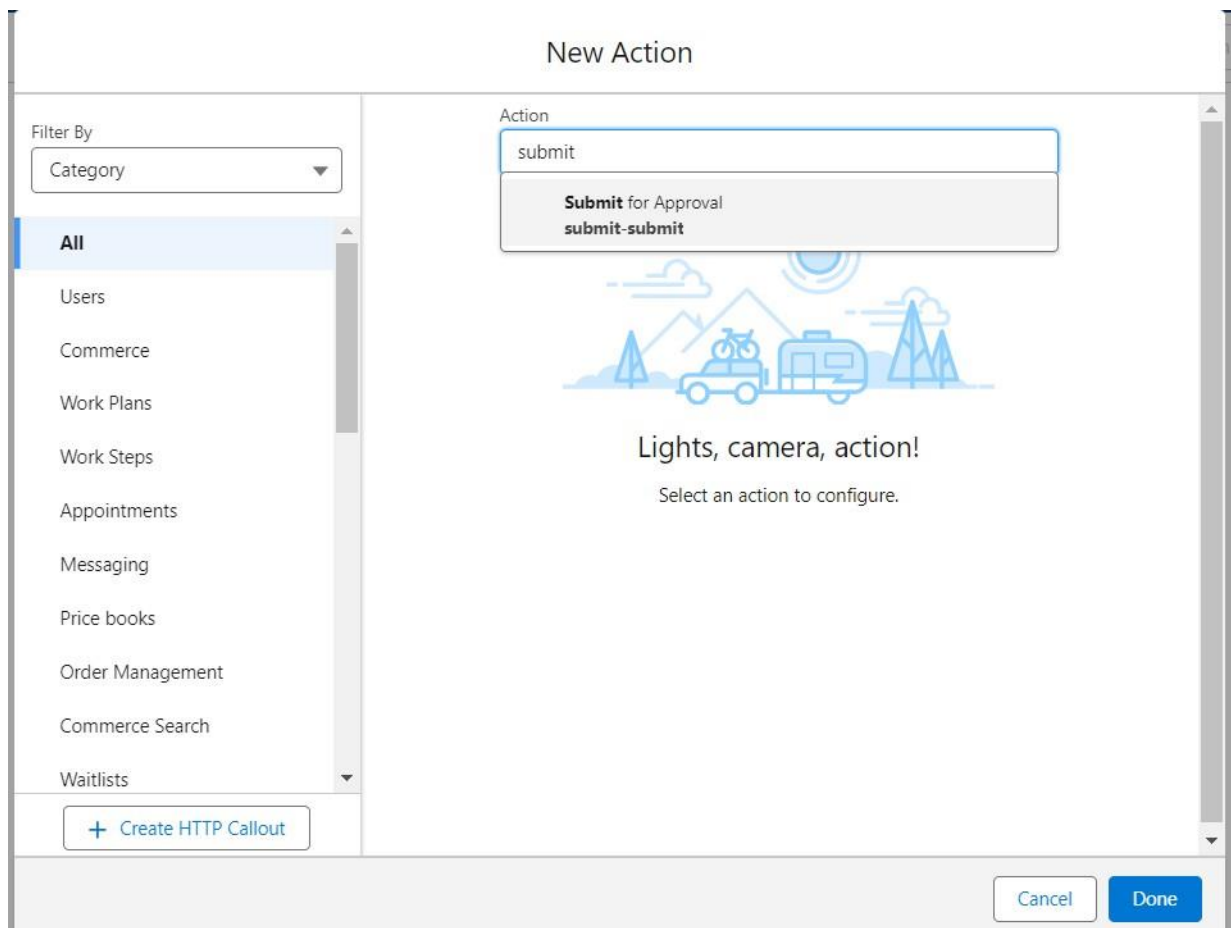
14) Activate the Approval Process.

Milestone 10 : - 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”



5) Add a “Action” → “Submit for Approval”



6) Give Label → Approval for property

7) Record Id → {!!\$Record.Id}

8) Done

New Action

Filter By
Category

All
Users
Commerce
Work Plans
Work Steps
Appointments
Messaging
Price books
Order Management
Commerce Search
Waitlists
[+ Create HTTP Callout](#)

Action
Submit for Approval

Use values from earlier in the flow to set the inputs for the "Submit for Approval" core action. To use its outputs later in the flow, store them in variables.

* Label
Approval for property

* API Name
Approval_for_property

Description

Set Input Values for the Selected Action

Record ID ⓘ
{!!\$Record.Id}

Approval Process Name Or ID ☐ Don't Include

Next Approver IDs ☐ Don't Include

Cancel Done

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

Save the flow

* Flow Label
Property Approval

* Flow API Name
Property_Approval

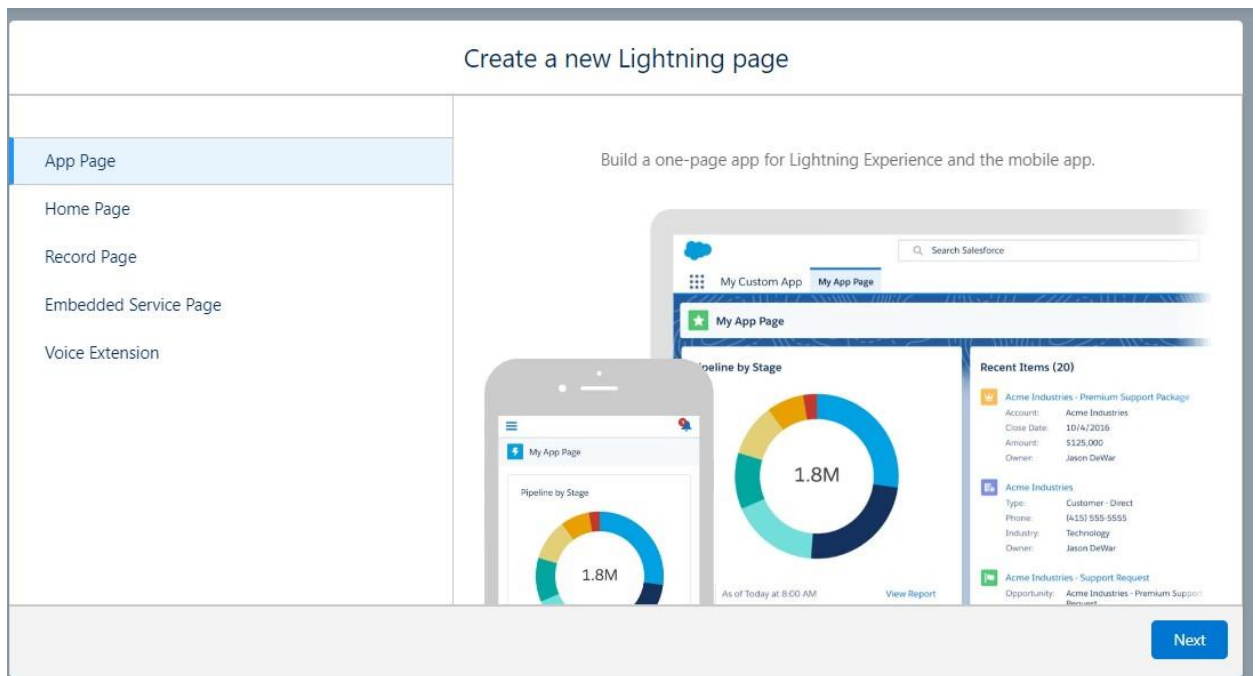
Description

[Show Advanced](#)

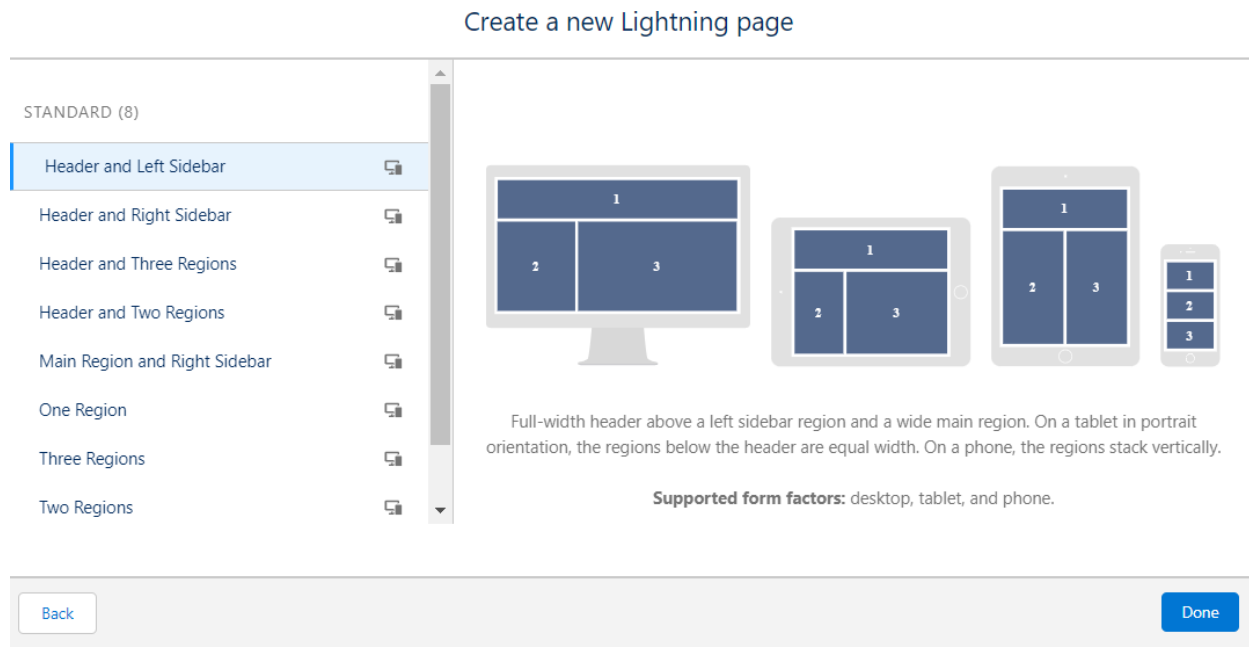
Cancel Save

Milestone 11 :- Create an App Page

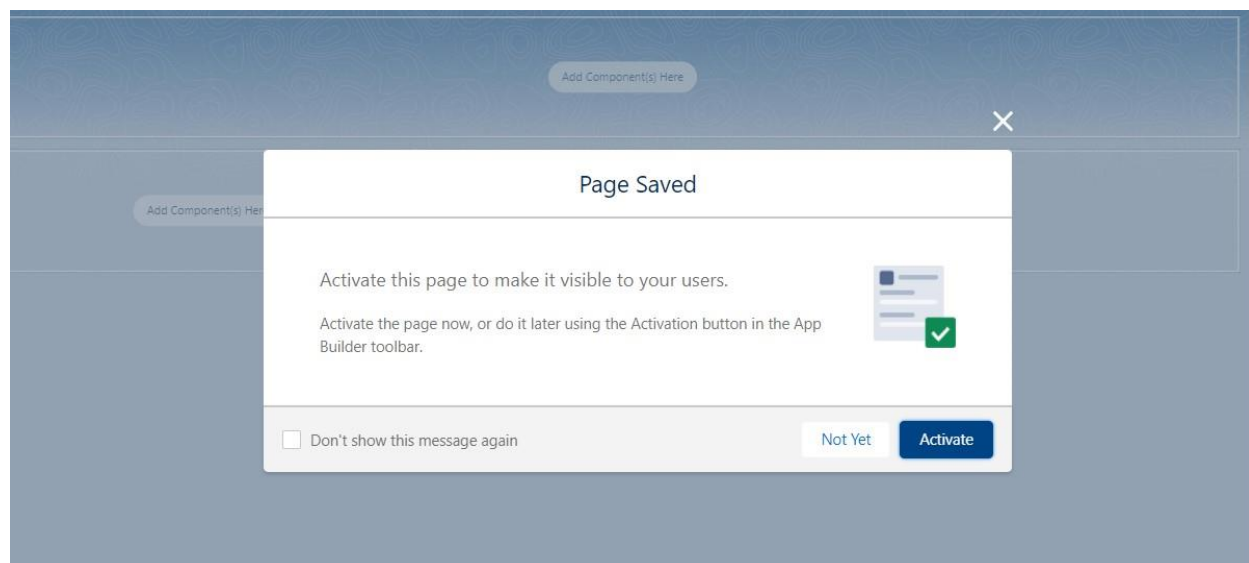
- Create an App Page on the Property details Object named as “Search Your Property”
- 1) From Setup → Go to Lightning App Builder → Click on New → Select App Page and Click on Next.



- 2) Give Label as “Search your Property” click “Next”.
- 3) Click “header and Left Sidebar” and Click on “Done”



4) Click on “Save ” and then click on “Activate”.



5) From Page Setting select page activation as “Activate for all Users”.

Activation: Search your property

PAGE SETTINGS

LIGHTNING EXPERIENCE

MOBILE NAVIGATION

Give this app page a name, set the page visibility, and choose an icon.

Name

Enter a name for your page.

Search your property

Icon

Choose an icon to represent your app in Lightning Experience and the mobile app.

Change...

Page Activation

When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup.

☒ Activate for all users

☐ Activate for system administrators only

To set further restrictions on who sees this page, use permission sets and profile assignments in Setup.

Cancel

Save

6) From Lightning Experience Click on “Property Details” and click on Add Page“.

Activation: Search 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

LightningBolt

LightningInstrumentation

LWC Component

Property Details

Queue Management

Sales

Sales Console

Salesforce CMS

Property Details

Search Your Property

Search your property

↕

Remove page

Cancel

Save

7) Then Click on “Save”

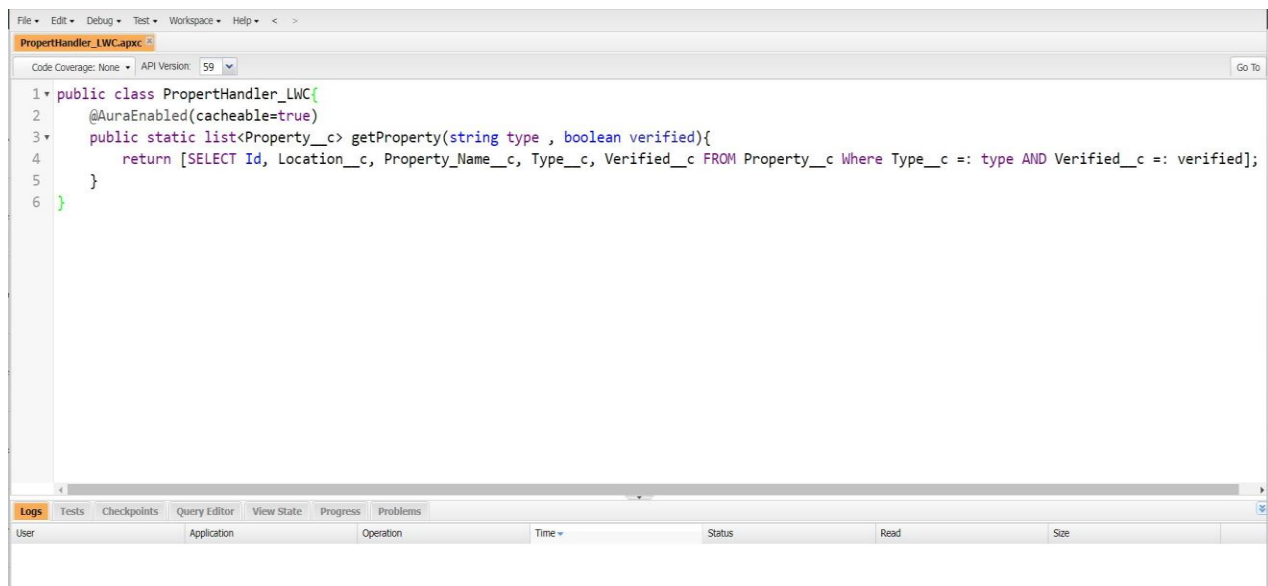
Milestone 12 :- Create a LWC Component

- 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”

Code: -

```
public class PropertHandler_LWC{
    @AuraEnabled(cacheable=true)
    public static list<Property__c> getProperty(string type , boolean verified){
        return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM
Property__c Where Type__c =: type AND Verified__c =: verified];
    }
}
```



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

- 3) Enter your login id and password to authorize your org.
- 4) Now (ctrl+shift +P) → Create a lightning Web Component and Name it Anything you want to. (Example -)
- 5) In your Html File Write this code : -

Code :-

```

<template>
  <lightning-card>
    <div class="slds-box">
      <div class="slds-text-align_left">
        <h1 style="font-size: 20px;"><b>Properties</b></h1>
      </div>
      <div>
        <div class="slds-grid slds-gutters">
          <div class="slds-col slds-size_5-of-6">
            <lightning-combobox name="Type" label="Property Type" value={typevar}
placeholder="Select Property type"
options={propetyoptions} onchange={changehandler}></lightning-combobox>
          </div>
          <div class="slds-col slds-size_1-of-6">
            <br>
            <lightning-button-icon variant="neutral" icon-name="standard:search"
alternative-text="Search"
label="Search" onclick={handleClick}></lightning-button-icon>
          </div>
        </div>
      </div>
    </div>

    <div>
      <template if:true={istru}>
        <div class="slds-box">
          <lightning-datatable key-field="id" data={propertylist}
columns={columns}></lightning-datatable>
        </div>
      </template>
      <template if:false={isfalse}>

```

```

        <div class="slds-box">
            <div style="font-size: 15px;"><b>No properties Are Found !!</b></div>
        </div>
    </template>

</lightning-card>
</template>

```

```

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 </div>
22
23 <template if:true={istru}>
24     <div class="slds-box">
25         <lightning-datatable key-field="id" data={propertylist} columns={columns}></lightning-datatable>
26     </div>
27 </template>
28 <template if:false={isfalse}>
29     <div class="slds-box">
30         <div style="font-size: 15px;"><b>No properties Are Found !!</b></div>
31     </div>
32 </template>
33
34 </lightning-card>
35 </template>

```

6) In Your Js File Write this code :-

Code :-

```

import { LightningElement, api, track, wire } from 'lwc';
import getProperty from '@salesforce/apex/PropertHandler_LWC.getProperty';
import { getRecord } from 'lightning/uiRecordApi';
import USER_ID from '@salesforce/user/Id';
export default class C_01_Property_Management extends LightningElement {
    @api recordId
    userId = USER_ID;

```



```

verifiedvar
typevar
isfalse = true;
istrue = false;
@track propertylist = [];
columns = [
    { label: 'Property Name', fieldName: 'Property_Name_c' },
    { label: 'Property Type', fieldName: 'Type_c' },
    { label: 'Property Location', fieldName: 'Location_c' },
    { label: "Property link", fieldName: "Property_link_c" }
]
propetyoptions = [
    { label: "Commercial", value: "Commercial" },
    { label: "Residential", value: "Residential" },
    { label: "rental", value: "rental" }
]
@wire(getRecord, { recordId: "$userId", 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')
    }
}

changehandler(event) {
    console.log(event.target.value);
    this.typevar = event.target.value;
}
handleClick() {

    getProperty({ type: this.typevar, verified: this.verifiedvar })
        .then((result) => {
            this.isfalse = 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 && result.length != 0) {
        this.istrue = true;
        this.propertylist = result;
        console.log(this.verifiedvar);
        console.log(this.typevar)
    } else {
        this.isfalse = false;
        this.istrue = false;
    }

})
.catch((error) => {
    console.log(error)
})
}

}
```

◀ c_01_Property_Management.html **JS c_01_Property_Management.js** X ▶ c_01_Property_Management.js-meta.xml

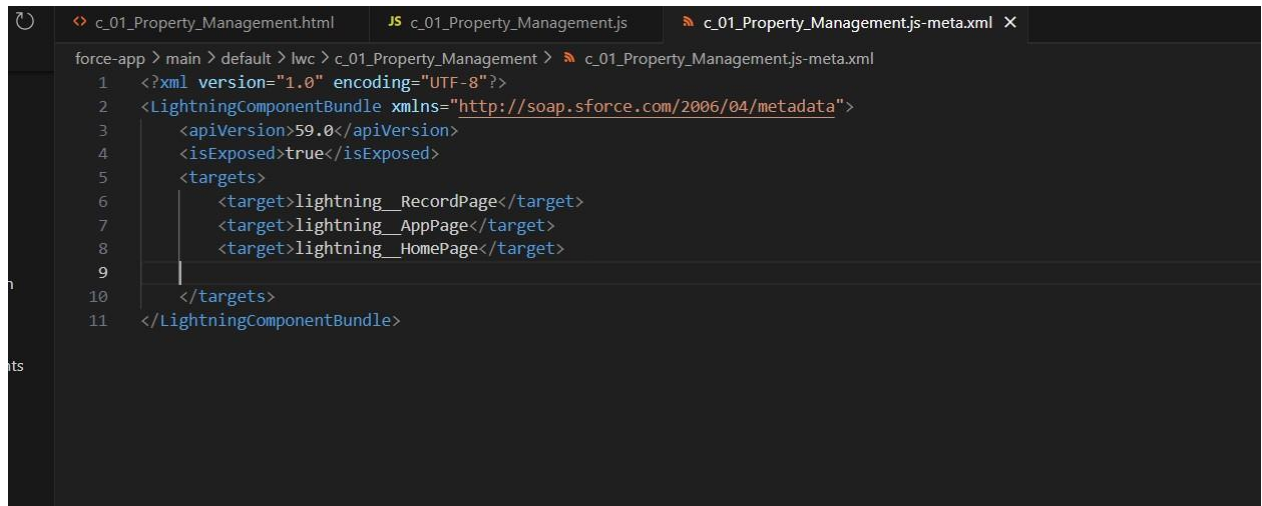
force-app > main > default > lwc > c_01_Property_Management > JS c_01_Property_Management.js > C_01_Property_Management > propertyoptions

```
1 import { LightningElement, api, track, wire } from 'lwc';
2 import getProperty from "@salesforce/apex/PropertyHandler_LWC.getProperty";
3 import { getRecord } from 'lightning/uiRecordApi';
4 import USER_ID from '@salesforce/user/Id';
5 export default class C_01_Property_Management extends LightningElement {
6     @api recordId
7     userId = USER_ID;
8     verifiedvar
9     typevar
10    isfalse = true;
11    istrue = false;
12    @track propertylist = [];
13    columns = [
14        { label: 'Property Name', fieldName: 'Property_Name_c' },
15        { label: 'Property Type', fieldName: 'Type_c' },
16        { label: 'Property Location', fieldName: 'Location_c' },
17        { label: 'Property link', fieldName: 'Property_link_c' }
18    ]
19    propertyoptions = [
20        { label: "Commercial", value: "Commercial" },
21        { label: "Residential", value: "Residential" },
22        { label: "rental", value: "rental" }
23    ]
24
25    @wire(getRecord, { recordId: "$userId", fields: ['User.Verified_c'] })
26    recordFunction({ data, error }) {
27        if (data) {
28            console.log(data)
29            console.log("This is the User Id ----> " + this.userId);
30            this.verifiedvar = data.fields.Verified_c.value;
31        } else {
32            console.error(error)
33            console.log('this is error')
34        }
35    }
36
37    changehandler(event) {
38        console.log(event.target.value);
39        this.typevar = event.target.value;
40    }
41    handleClick() {
42
43        getProperty({ type: this.typevar, verified: this.verifiedvar })
44            .then((result) => {
45                this.isfalse = true;
46                console.log(result)
47                console.log('This is the User id ----> ' + this.userId);
48                console.log('This is the verified values ----> ' + this.verifiedvar);
49                if (result != null && result.length != 0) {
50                    this.istrue = true;
51                    this.propertylist = result;
52                    console.log(this.verifiedvar);
53                    console.log(this.typevar)
54                } else {
55                    this.isfalse = false;
56                    this.istrue = false;
57                }
58            })
59            .catch((error) => {
60                console.log(error)
61            })
62    }
63 }
64
65
66 }
```

7) In Your metafile give your targets to deploy the component.

Code :-

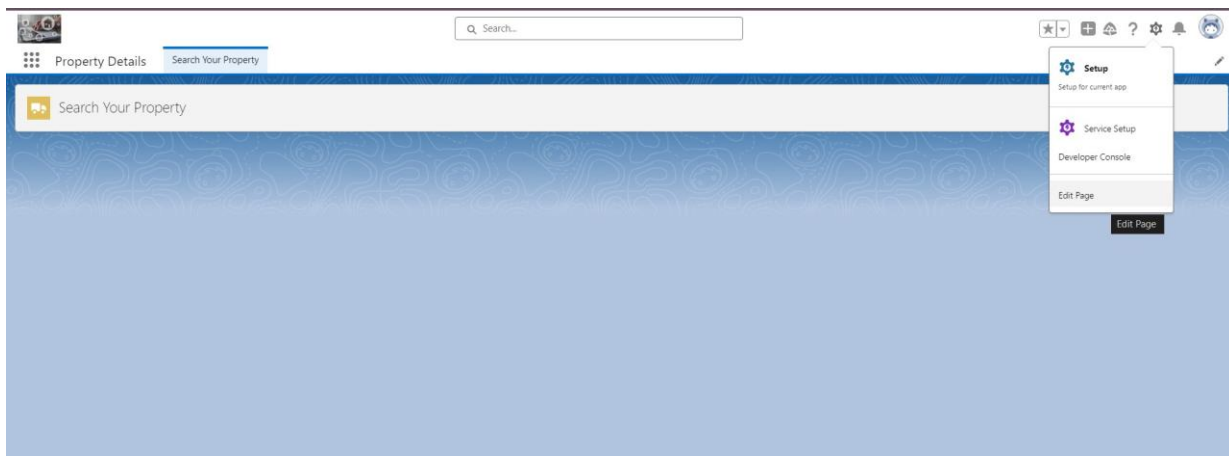
```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
  <apiVersion>59.0</apiVersion>
  <isExposed>true</isExposed>
  <targets>
    <target>lightning__RecordPage</target>
    <target>lightning__AppPage</target>
    <target>lightning__HomePage</target>
  </targets>
</LightningComponentBundle>
```



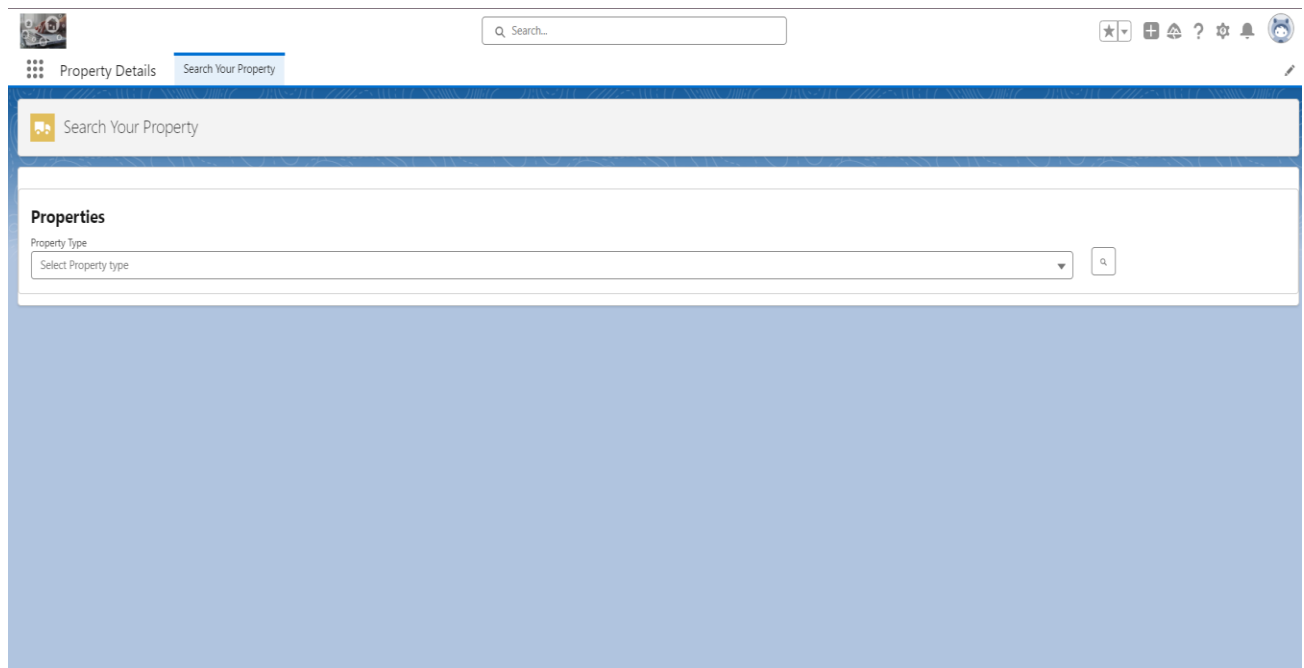
8) After Saving all the three Codes , Right Click and deploy this component to the org.

Milestone 13 : - Drag this Component to your App Page

- 1) From Setup → Go to App Launcher → Search for Property Details
- 2) On this Page click on gear icon and click on Edit Page



- 3) Drag theComponent to your App Page and Save the Page.



Milestone 14 : - 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”.

Team Members,
Jayakrishnabharathi S
Dharani M
Prasika S

*