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

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About CRM Application :

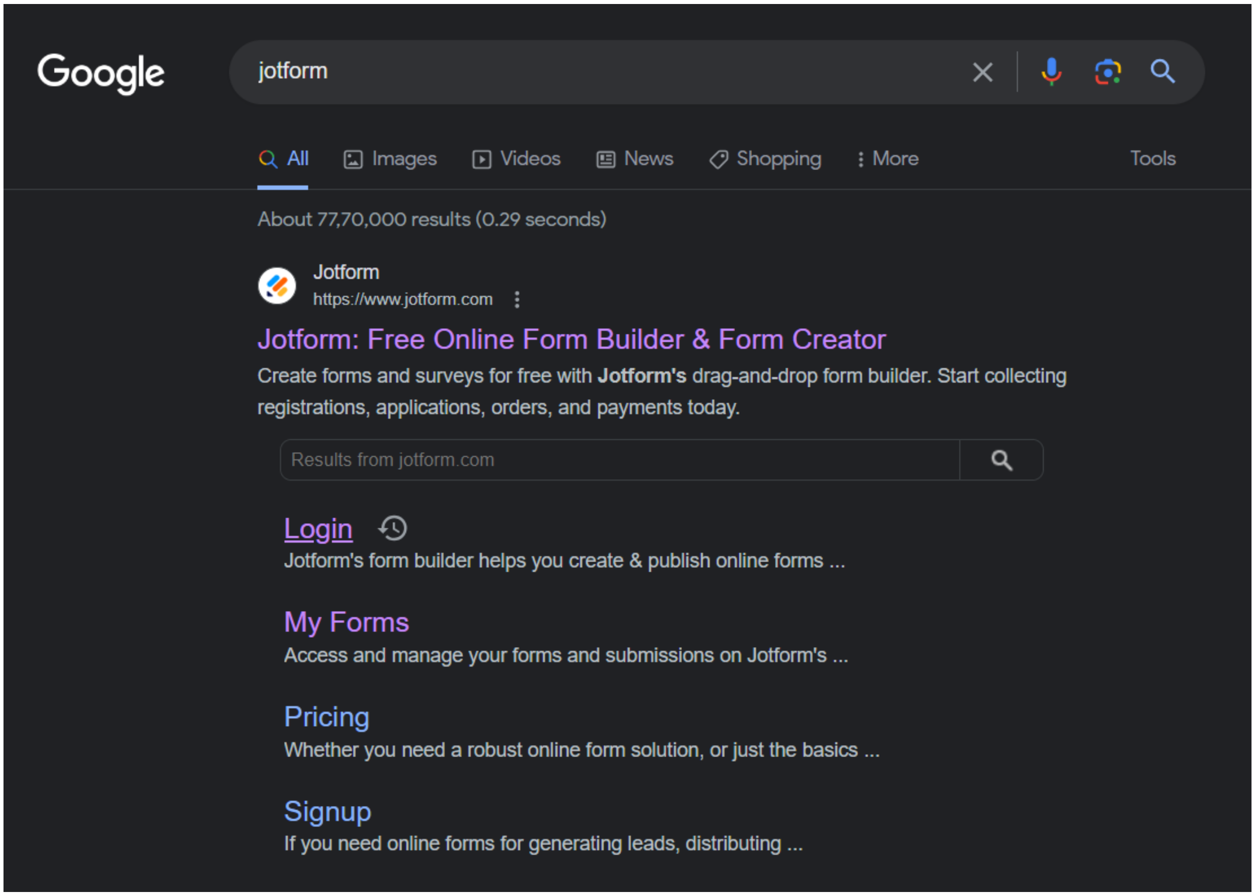
Dreams World Properties integrates Salesforce to streamline customer interactions. Website engagement triggers automated record creation in Salesforce, capturing customer details and preferences. Salesforce categorizes users as approved or non-approved, offering tailored property selections to approved 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.

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

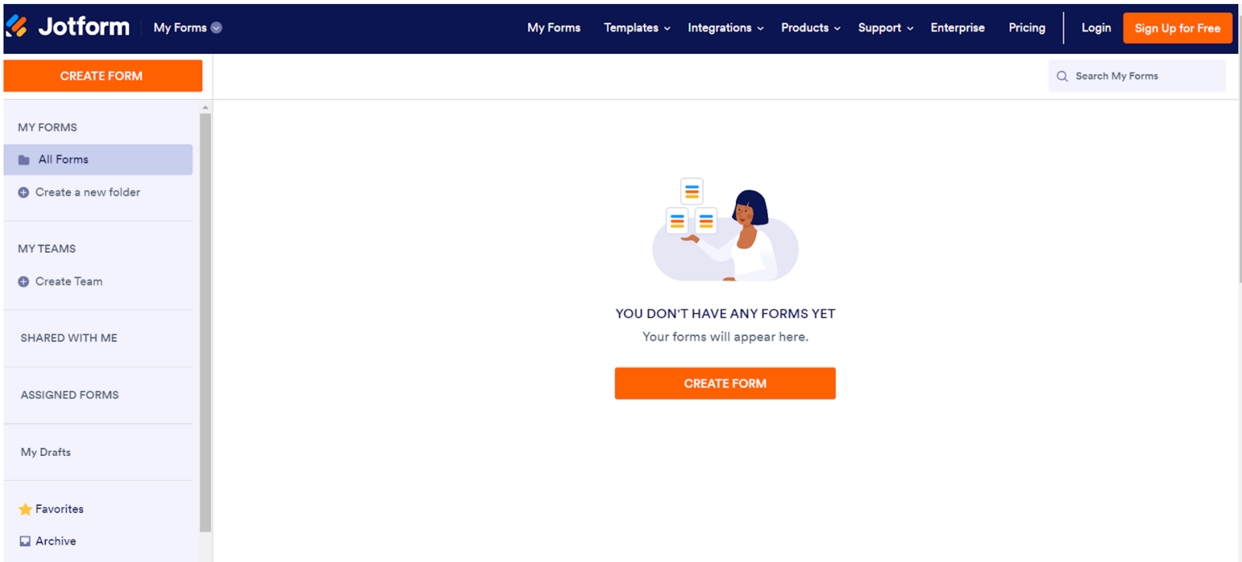
Client wants a form for the customers to get the details directly into the salesforce so that the admins can create a user in the org.

Activity 1

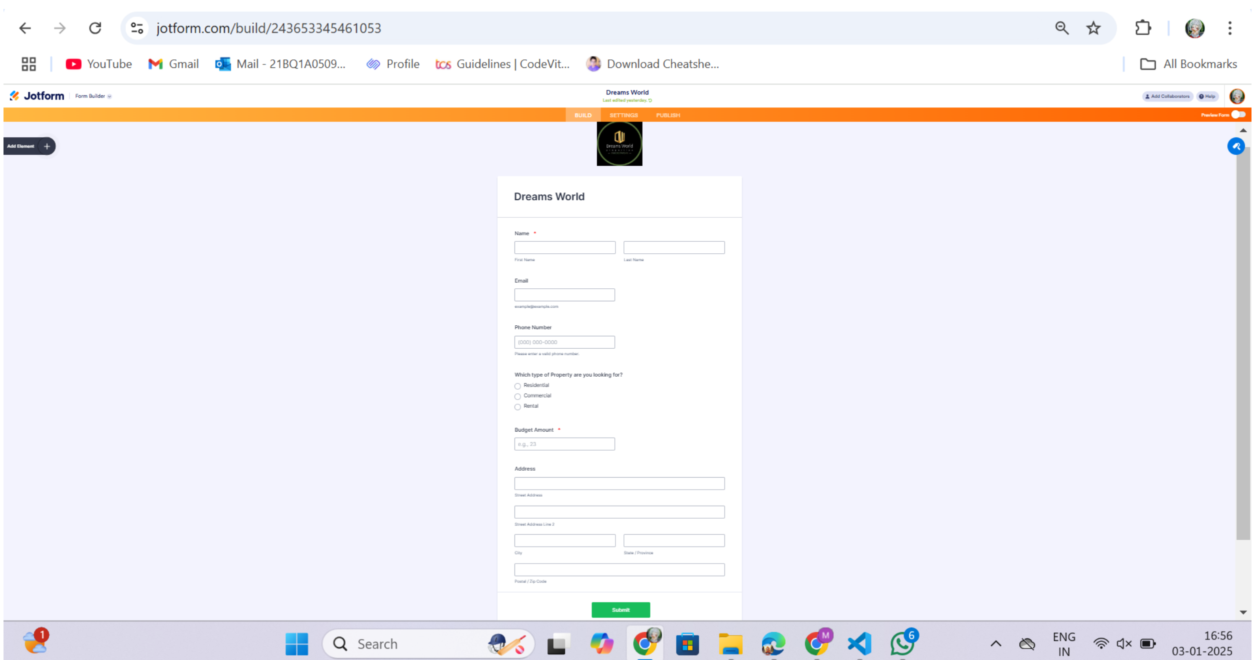
1. Open your browser and search for jotform and log in.



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.

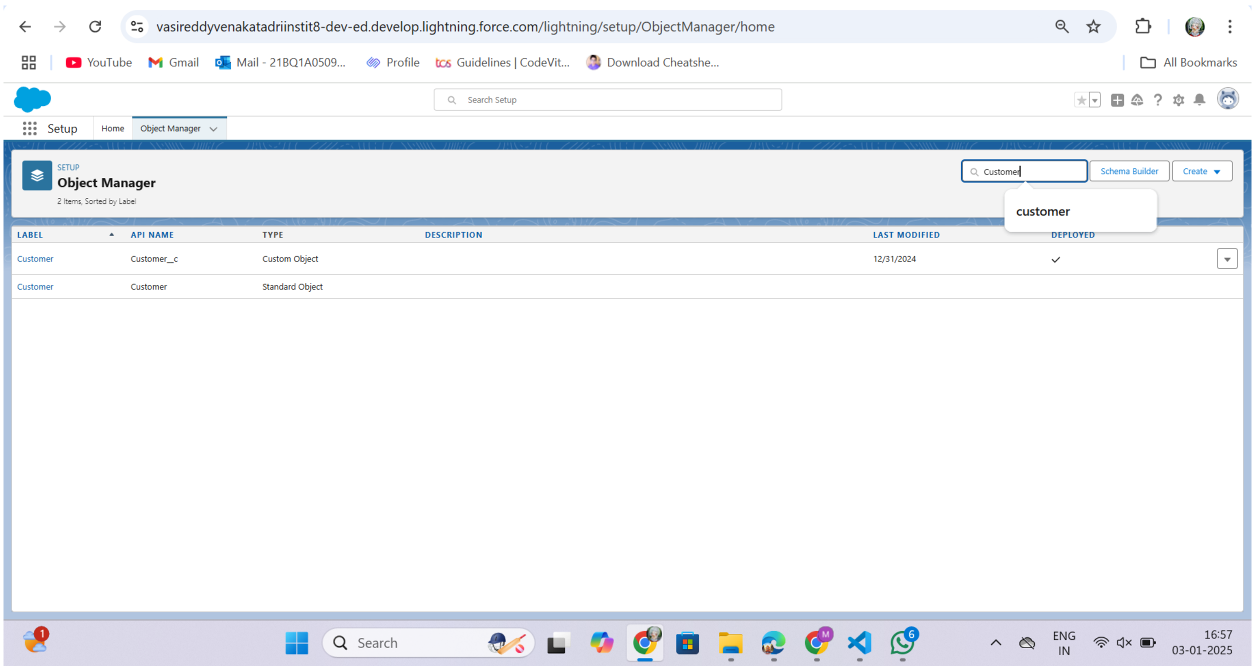


2.Create Objects from Spreadsheet.

Directly Creating Objects from Spreadsheet in Salesforce

Create Customer object

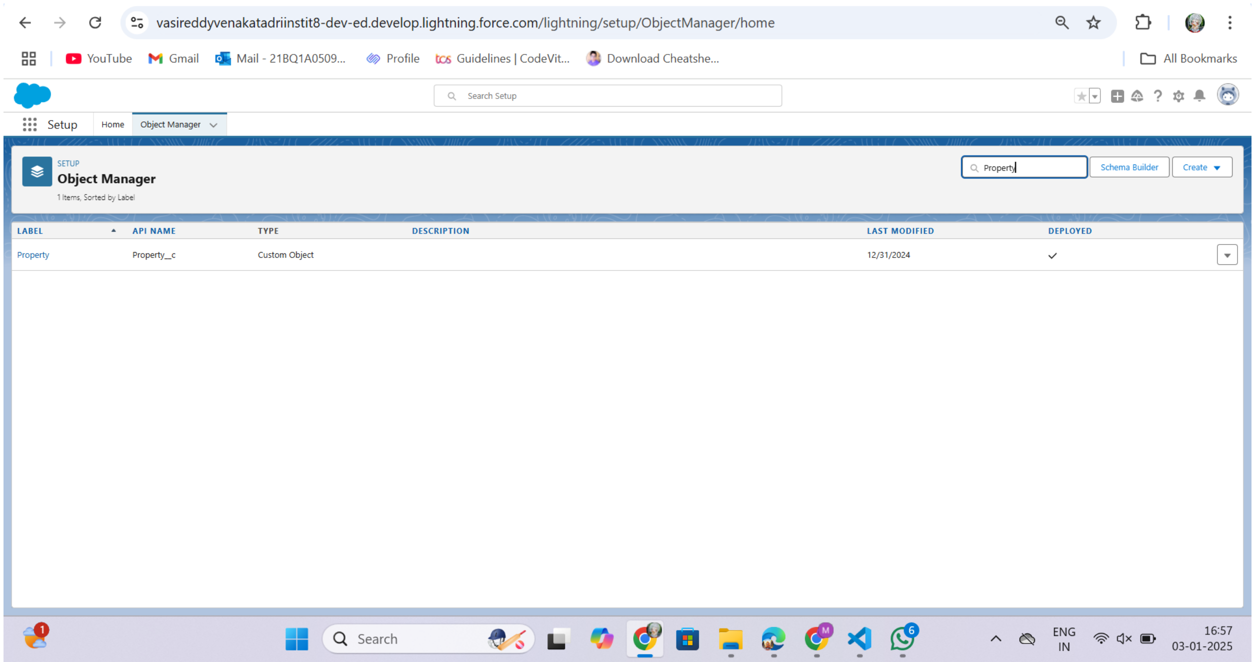
1. Go to your object manager and and click on create object from spreadsheet.
2. Click on the link to get the spreadsheet
3. customer
4. After downloading, upload the file, map the fields and upload to create an object.



Create Property object

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

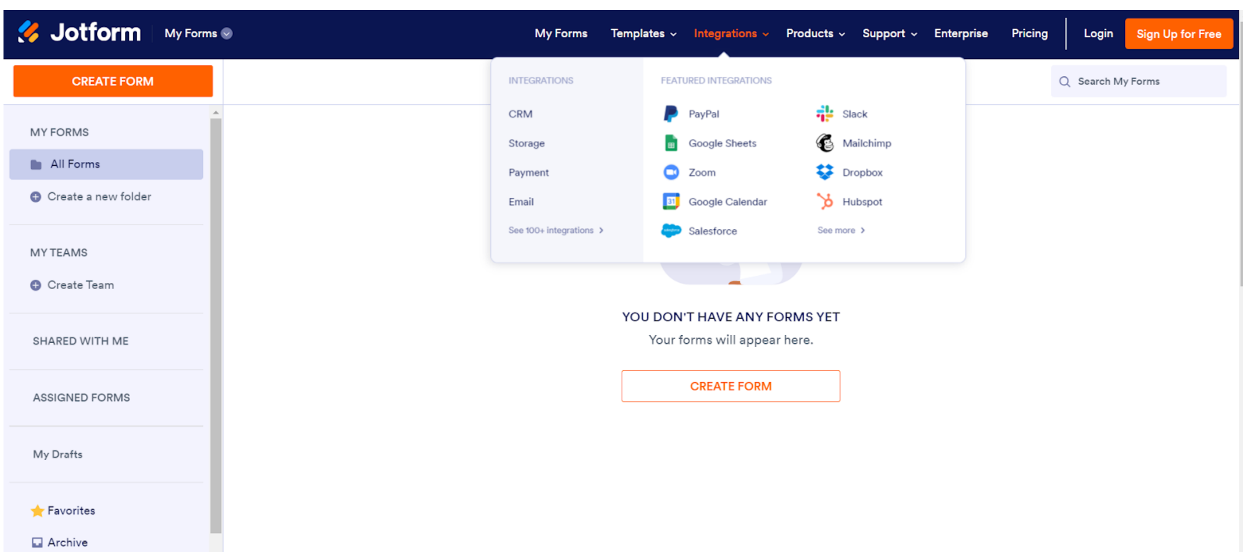
2. Property



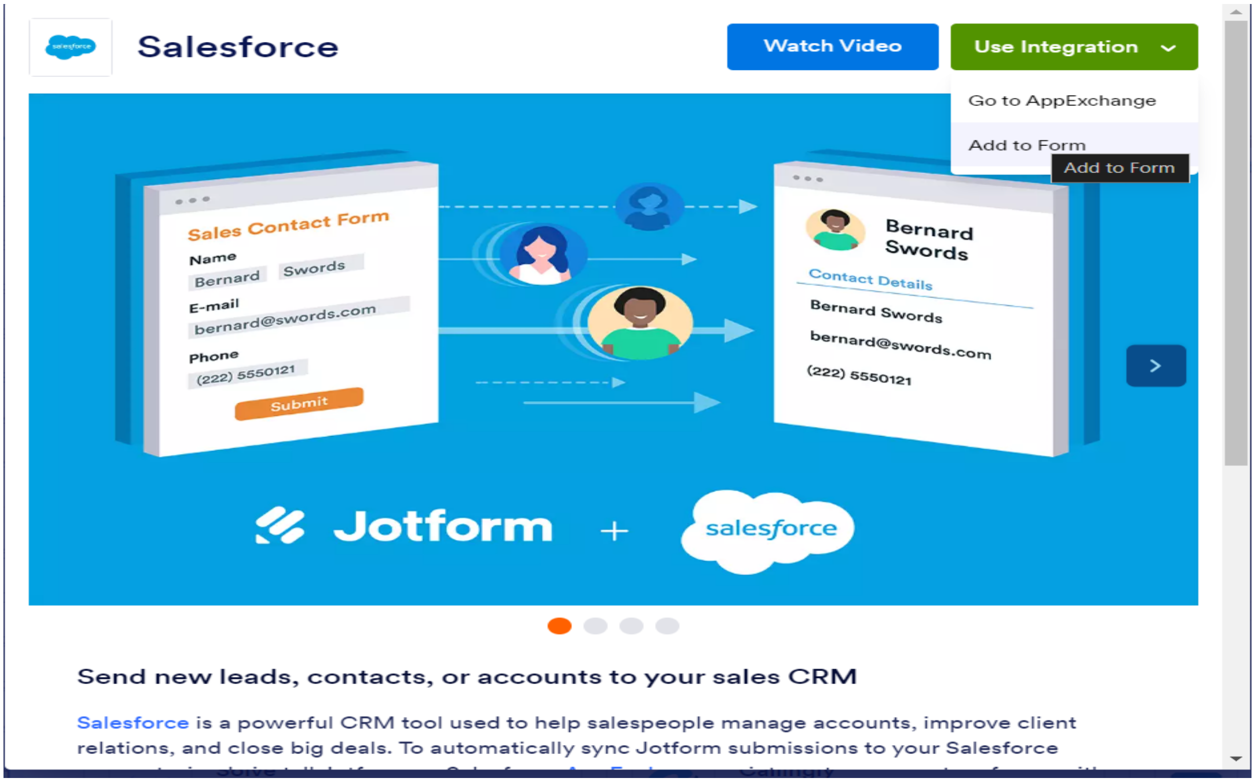
3.Integrate Jotform with Salesforce Platform

In this Milestone we are going to integrate jotform with Salesforce

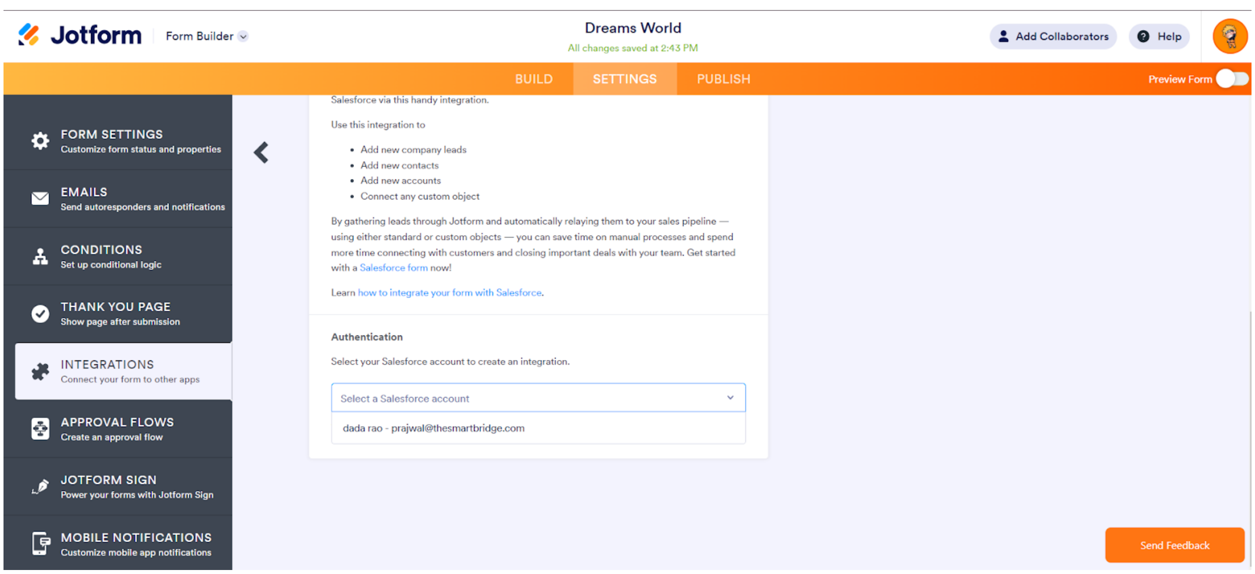
1. On the Jotform Platform, Click on Integration and choose Salesforce.



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

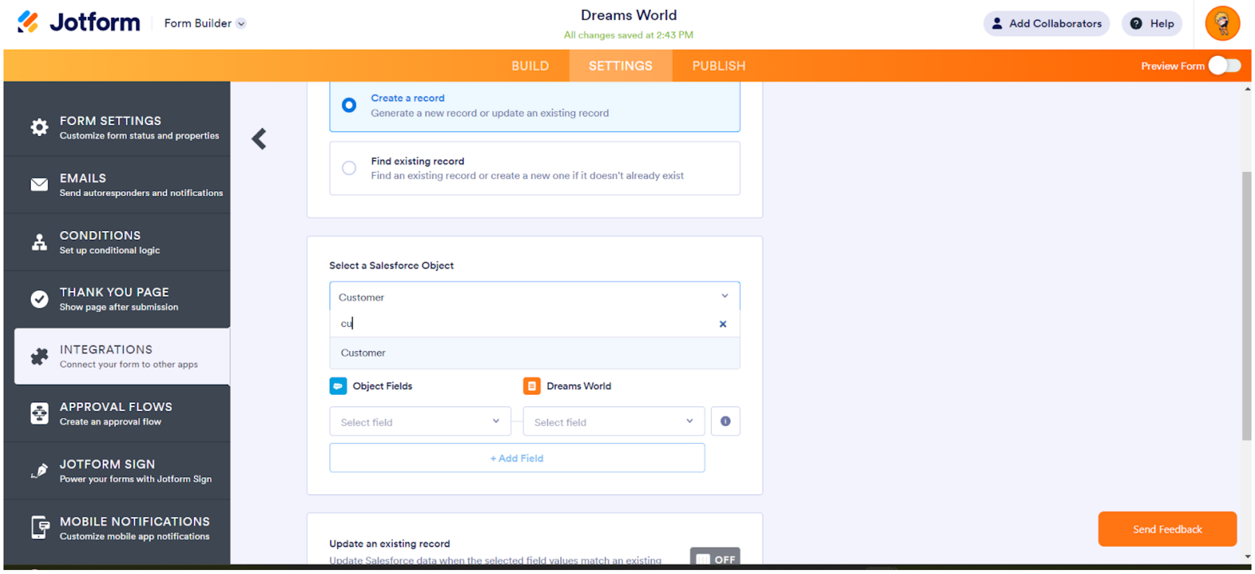


3. Select the Org with which you want to Integrate your jotform with.

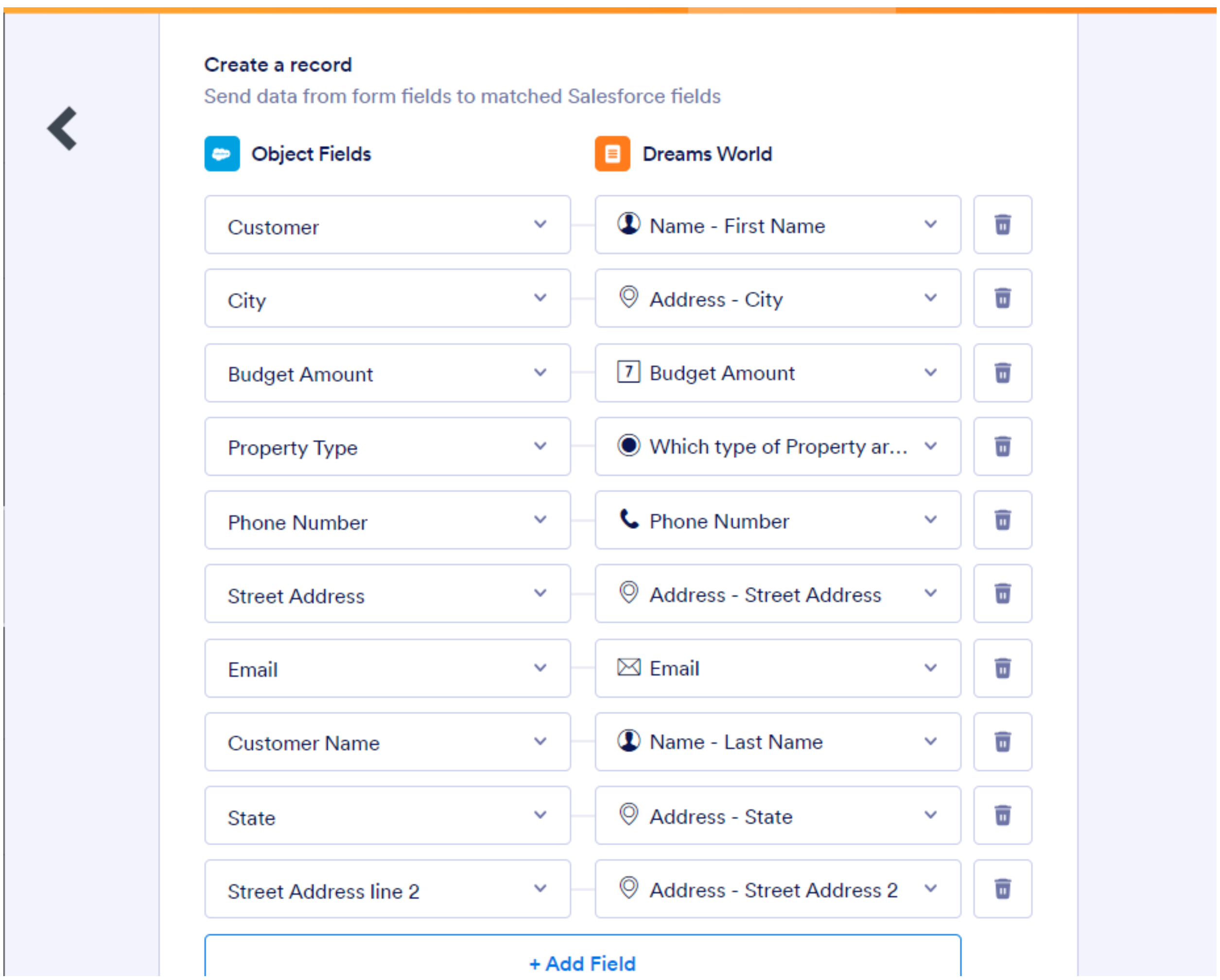


4. Select an Action - Create a record.

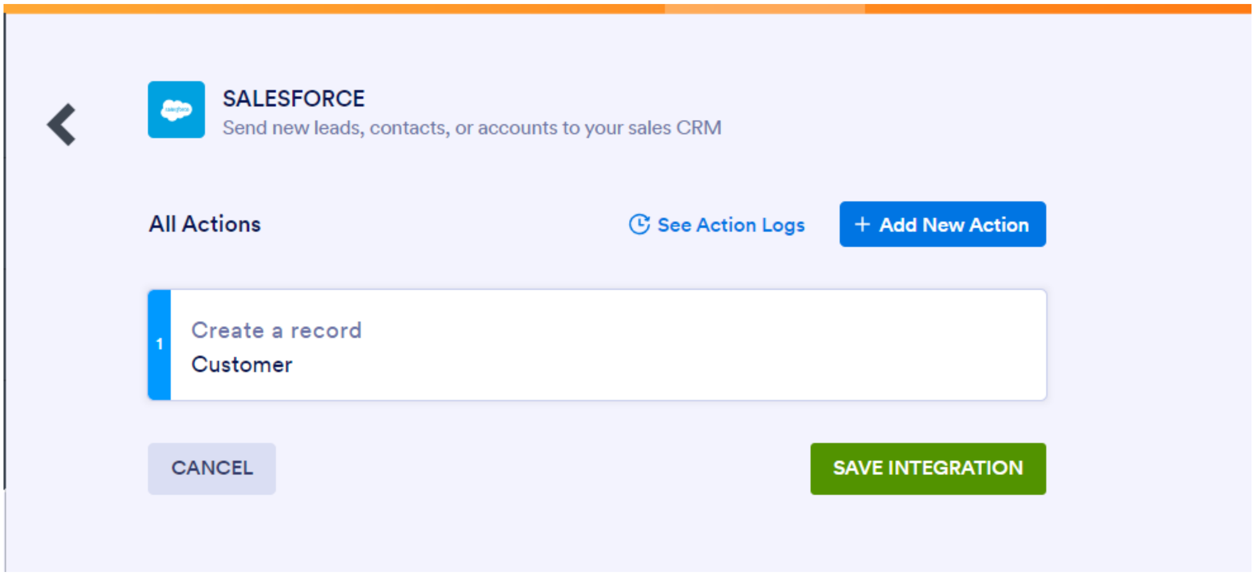
   Select a Salesforce Object : - Customer



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

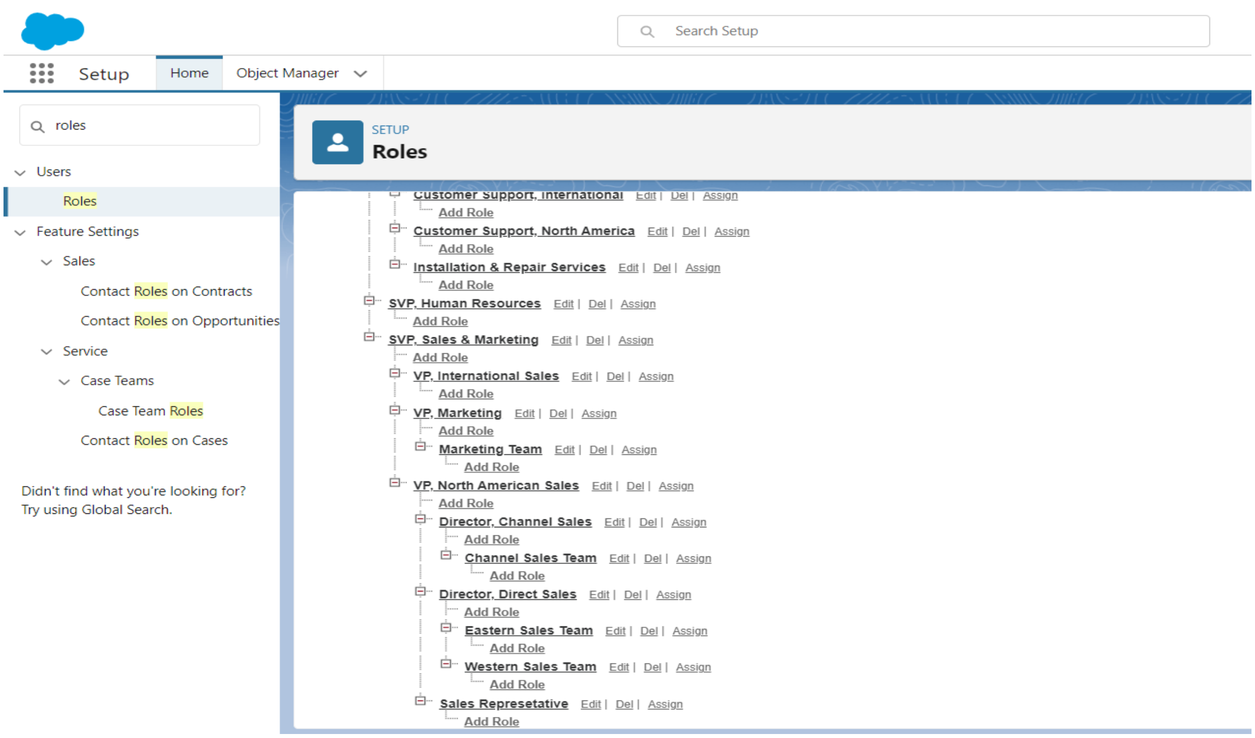


6. Then “Save the Integration” and “Finish”.



1.Create Roles

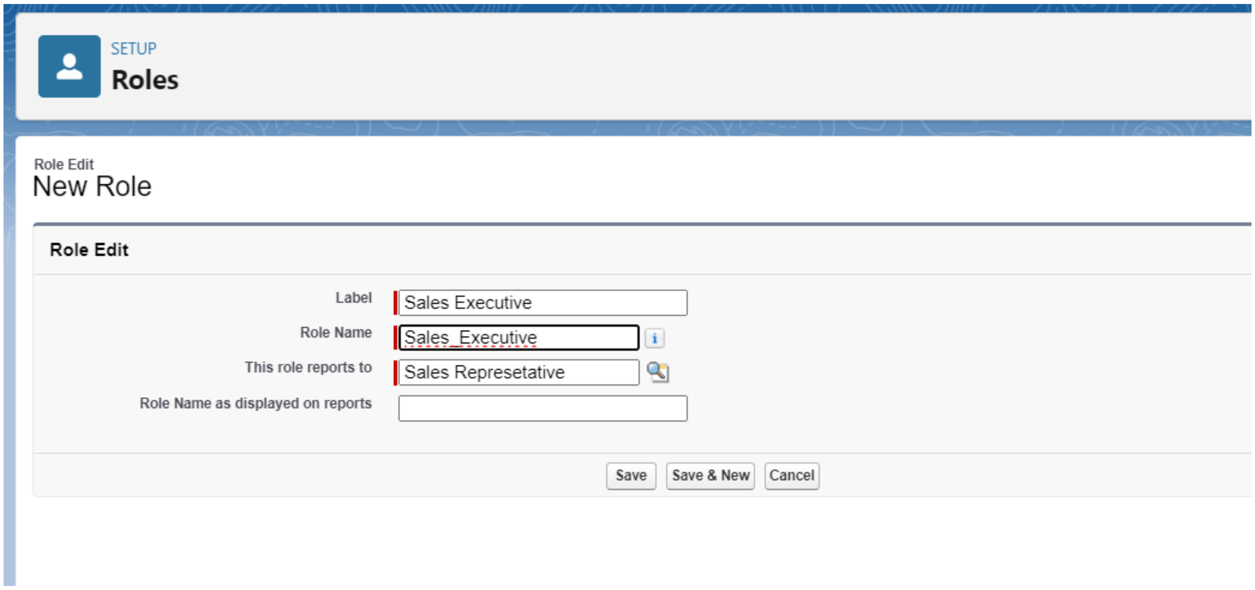
Create Roles as per business requirement.



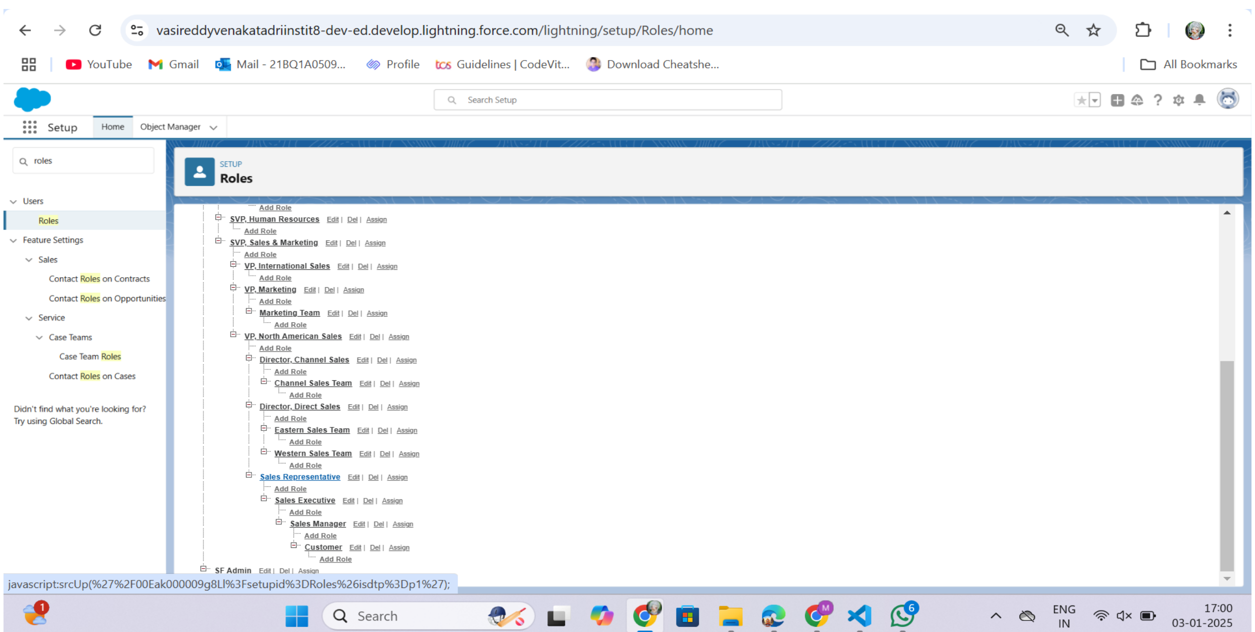
* It will use the "System Administrator Profile".

2) Label - Sales Executive

Reports to - Sales Representative



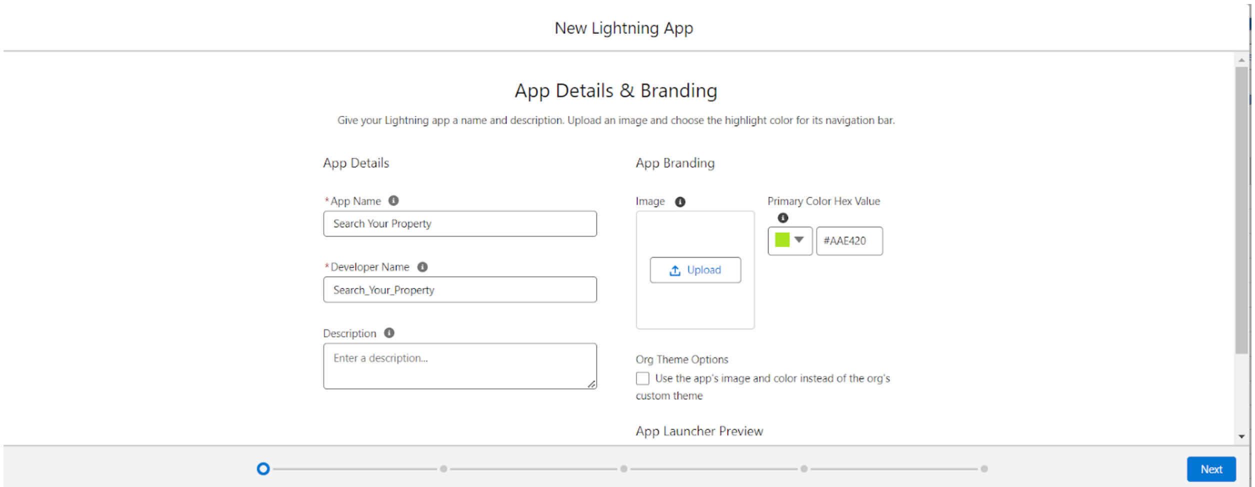
Similarly Create a Role Name “Sales Manager” below Sales Executive which reports to Sales Executive, Also Add a Role below Sales Manager labeled as “Customer” which reports to Sales Manager.



2.Create a Property Details App

An App where the objects will be displayed

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.



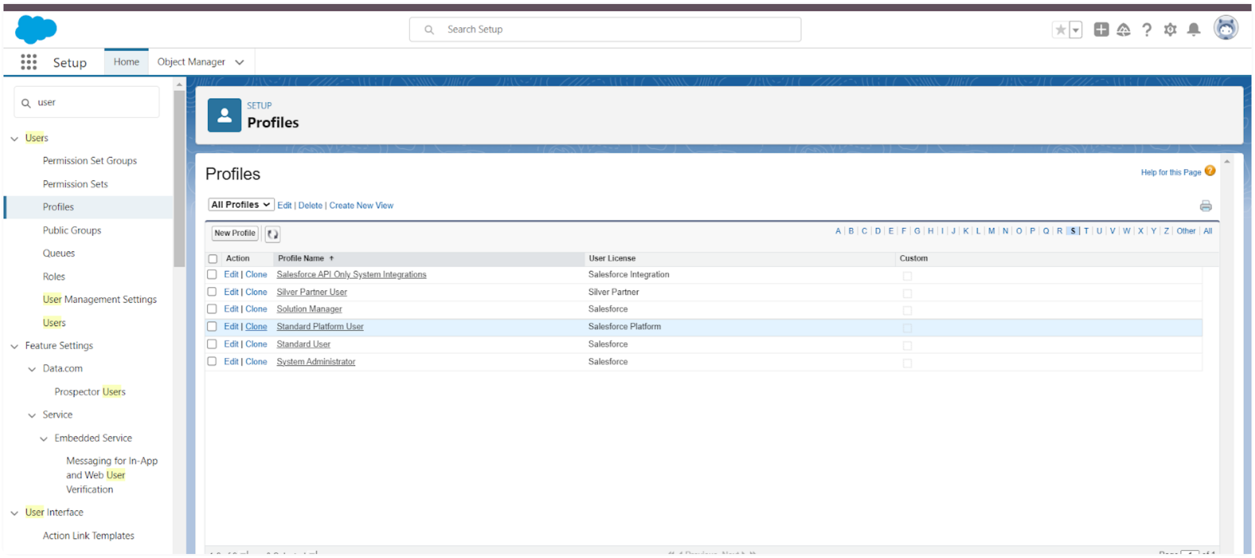
2) Click Next >> Next >> Save and Add “System Admin ”Profile.

3.Create Profiles

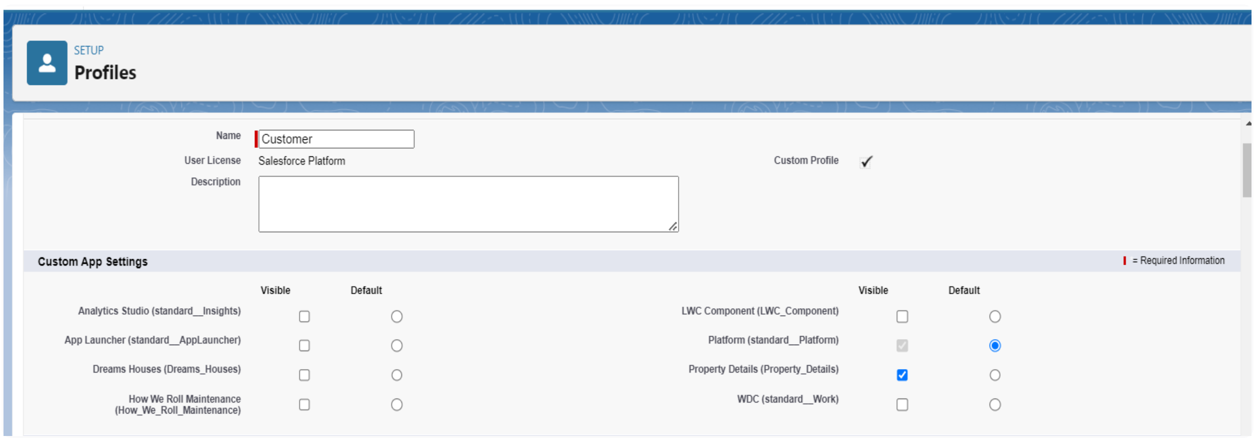
Create profiles as per business requirement

Customer

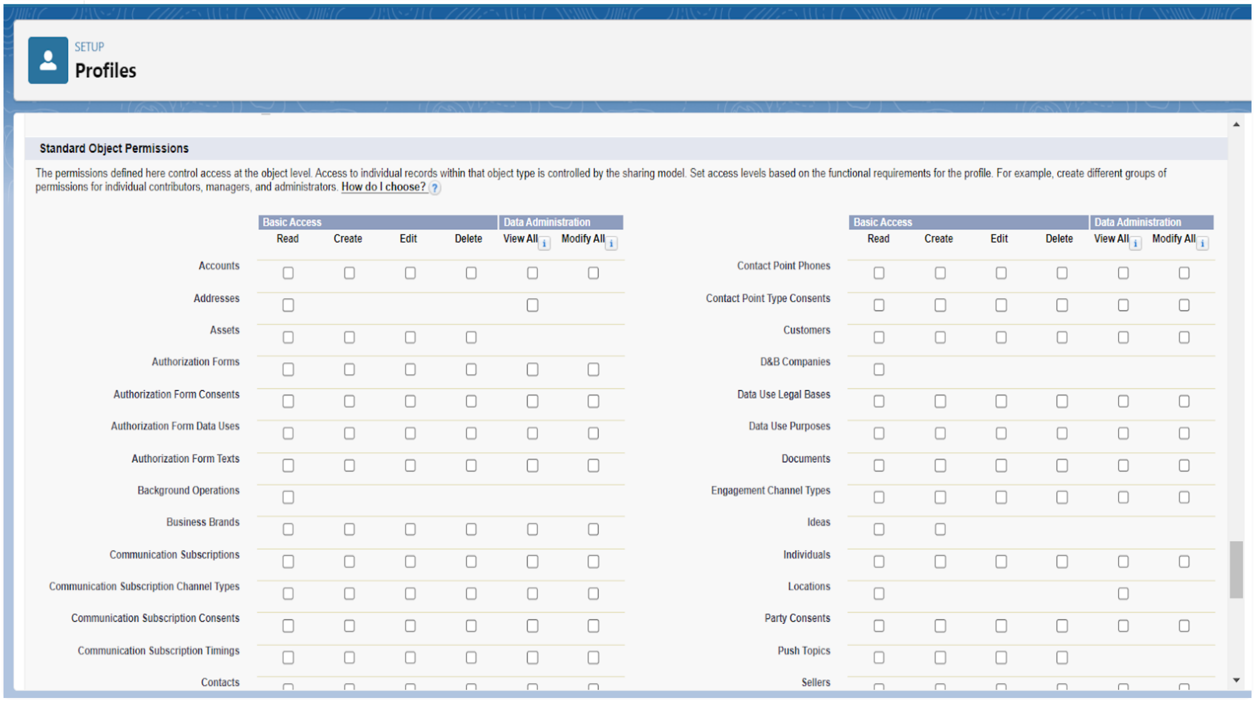
1. From Setup? Go to Profiles and Clone Salesforce Platform User and Name it “Customer”..



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



3. Also Remove all the Standard Object Permissions.

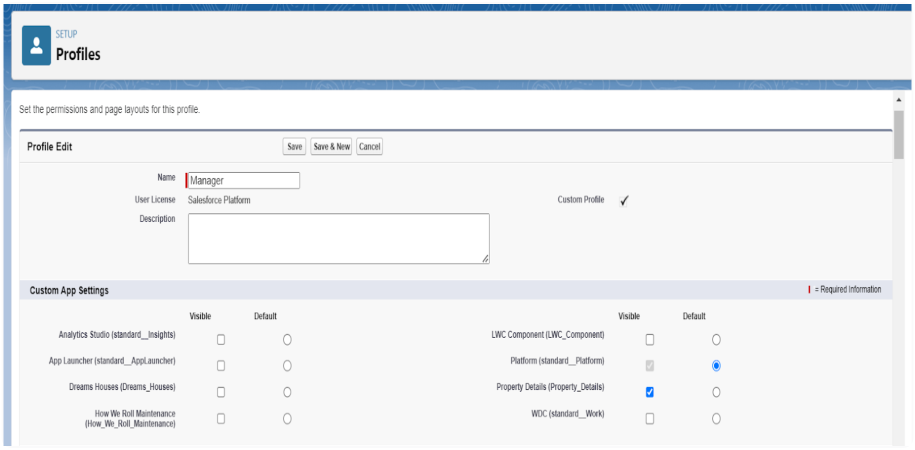


4. Uncheck all the Custom Object Permissions and check read and view all in “Property”

Manager

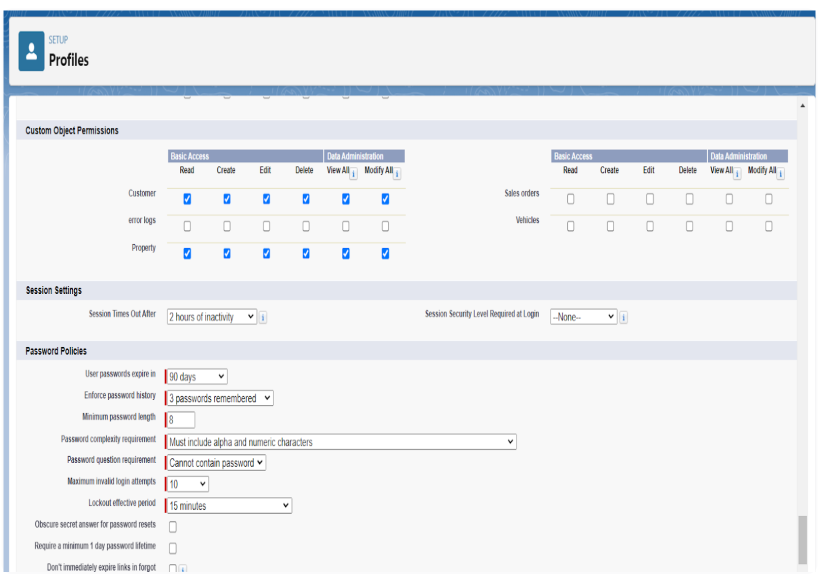
1. From Setup >> Go to Profiles and Clone Salesforce Platform User and Name it “Manager”..

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



3. Also Remove all the Standard Object Permissions.

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



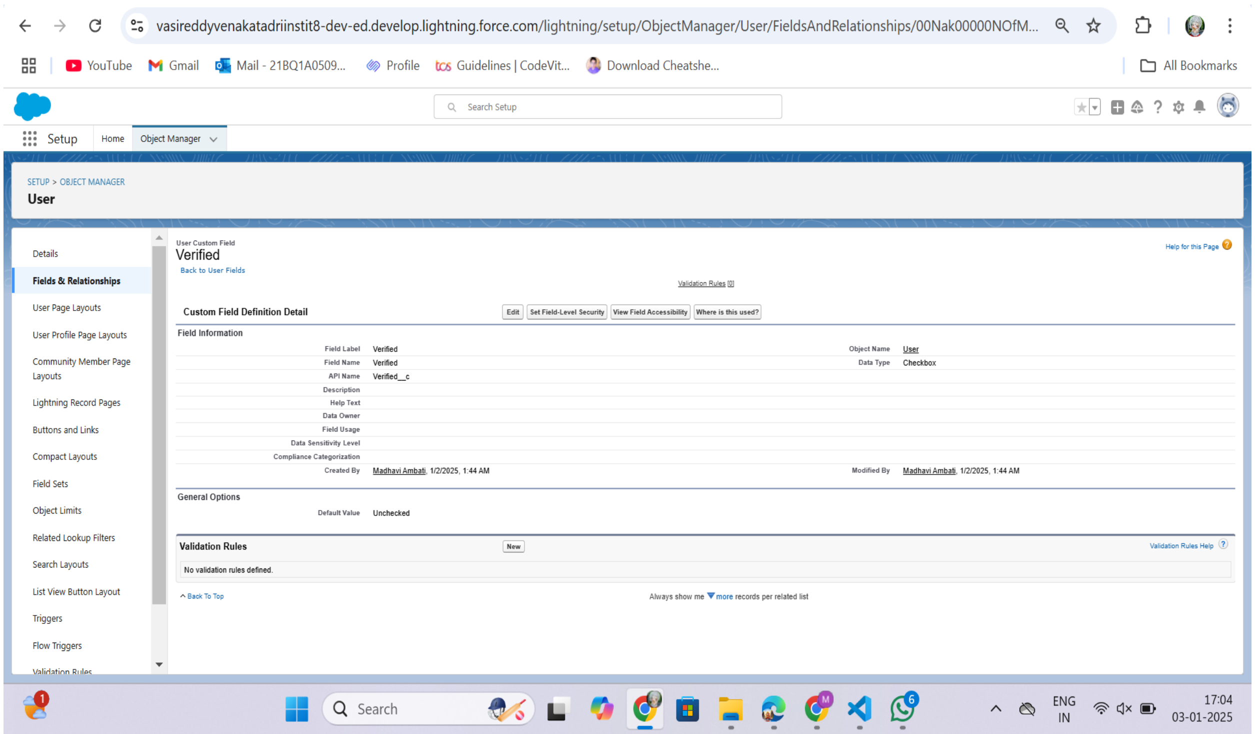
- ## Create a Check Box field on user

Create Field on the User as per the business requirement.

Activity 1

1. Setup >> Object Manager >> Search for User >> Fields and Relationships

2. Create new Field Named as “Verified” as Data type “Check Box”



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. 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. Make Sure the verified check box is “Unchecked”

7. Save

User 4

1. Go to Setup >> Administration >> Users >> New User

2. Last Name >> Customer2

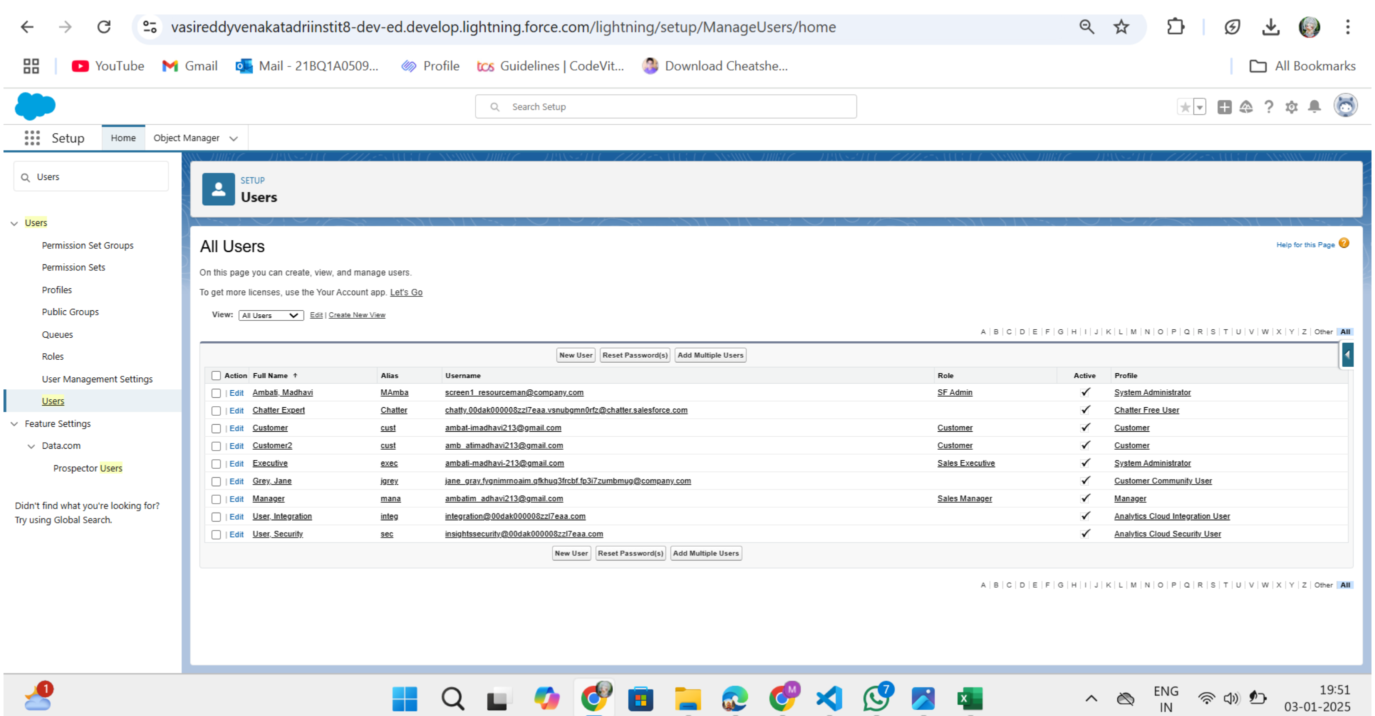
3. Role >> Customer

4. License >> Salesforce Platform

5. Profile >> Customer

6. Make Sure the verified check box is “checked”

7.Save



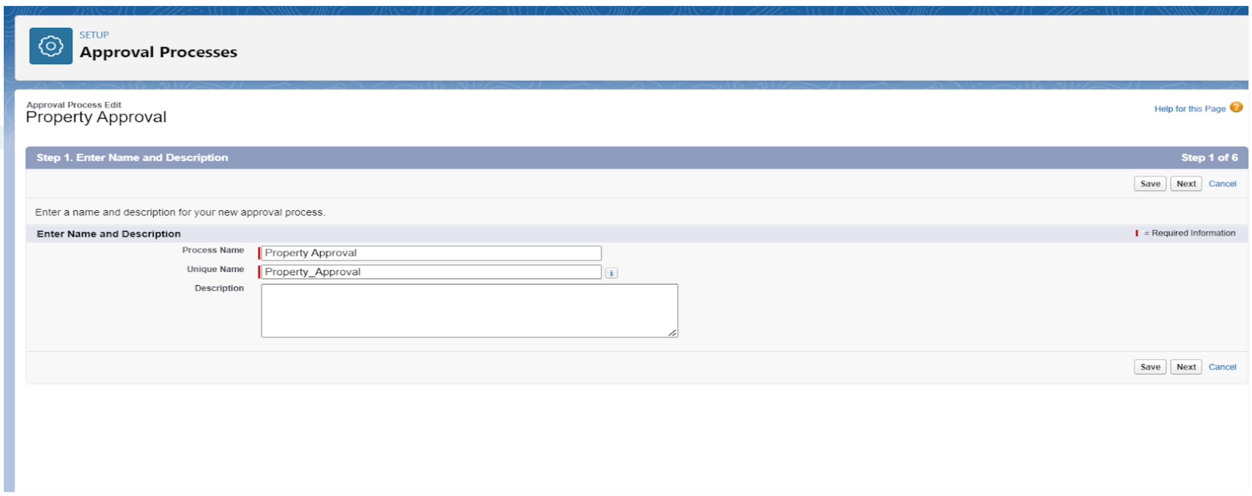
Create an Approval Process for Property Object

An Approval process to approve or reject the records as according

Activity 1

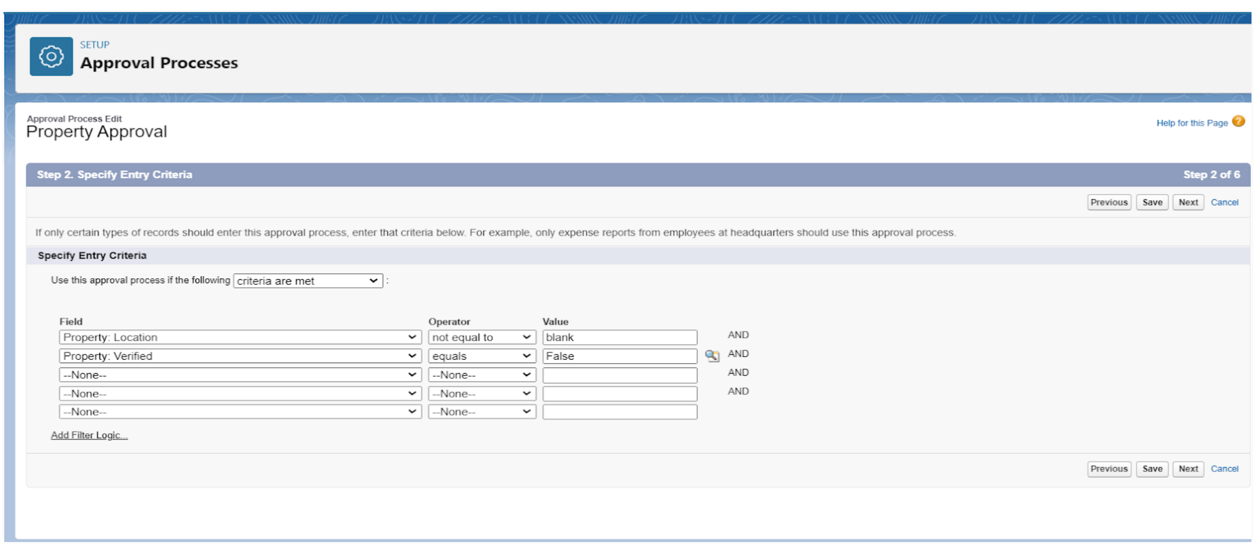
1. From Setup >> Process Automation >> Approval Process

2. Process Name - Property Approval



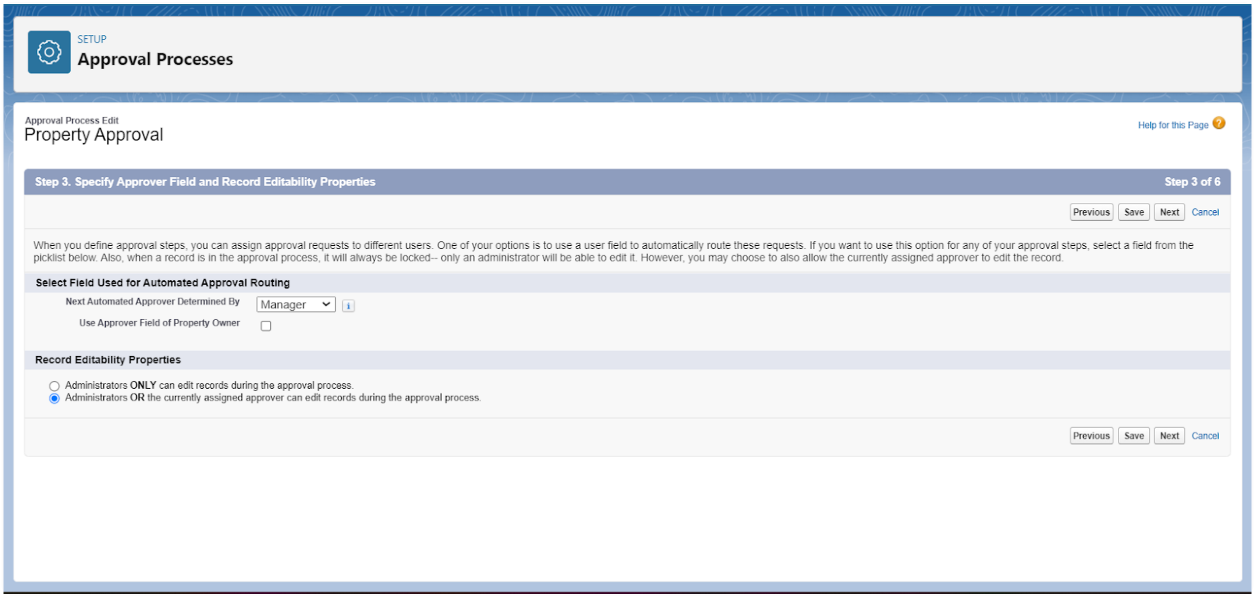
3.Give 2 criteria -

1. Location is not equal to blank,
2. Verified Equals false.

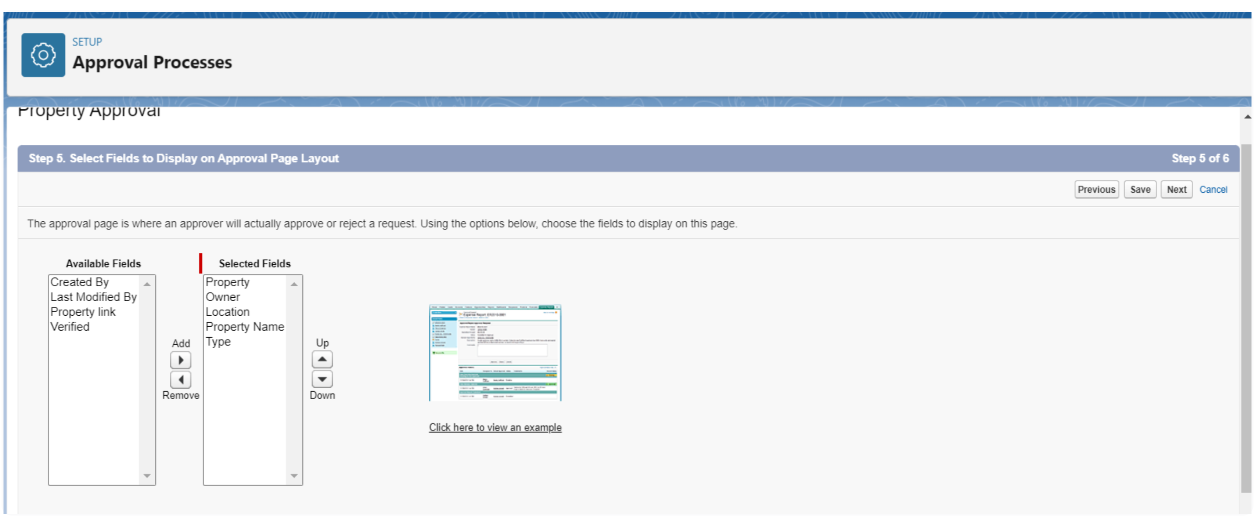


4) Click next and “Next Automated Approver Determined By” Select Manager

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



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



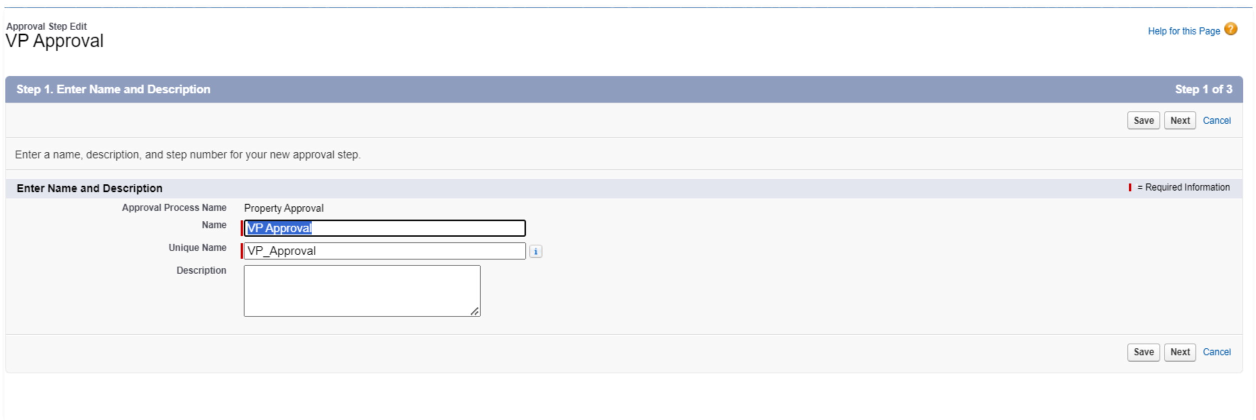
7) Click Next and Select the initial Submiters >>

a) Owner >> Property Owner

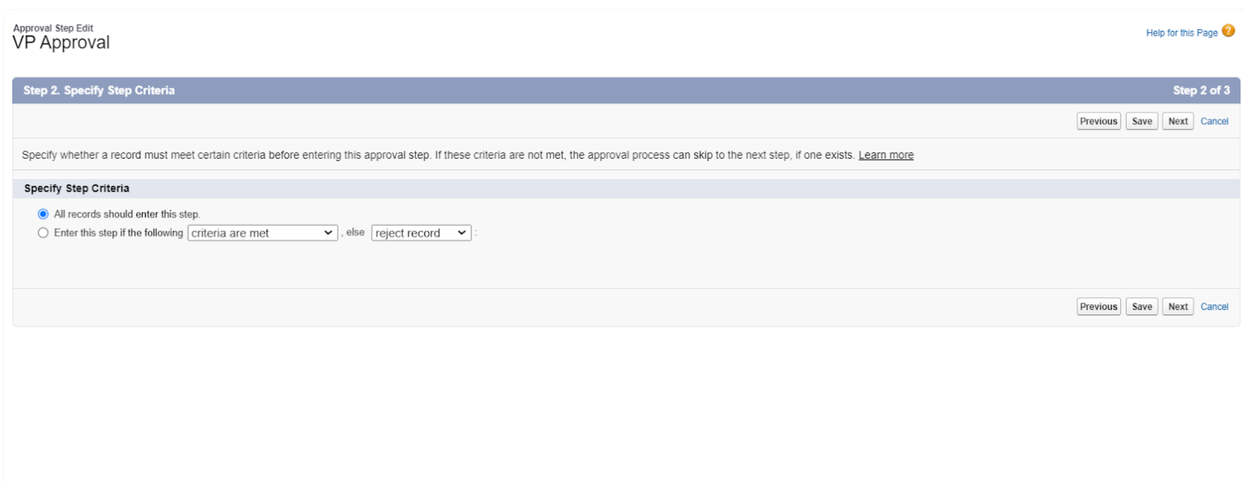
b)Roles >> Sales Manager

8) Save.

9) Add an approval step name “Executive Approval ”



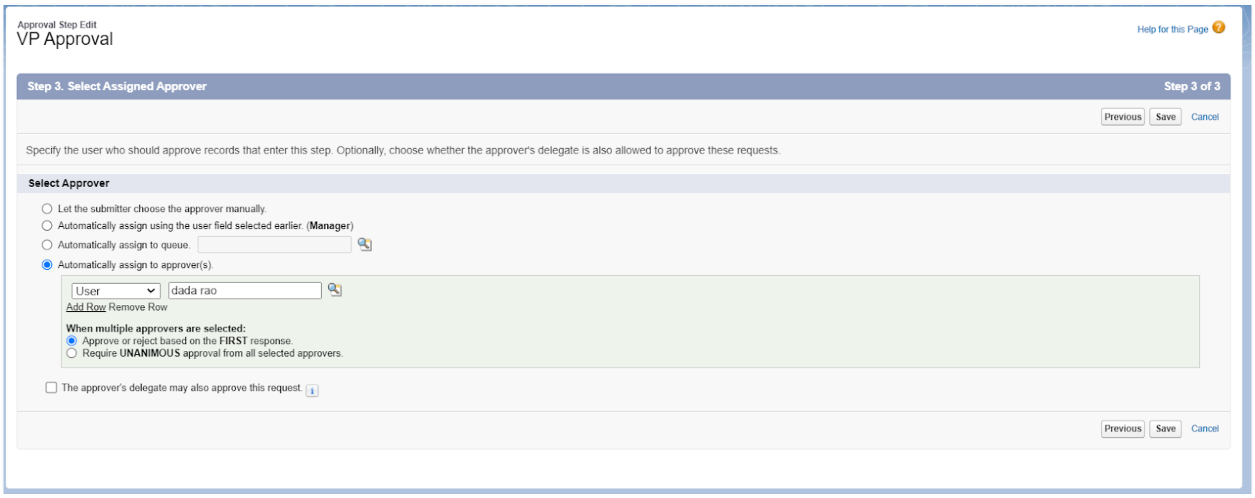
10)specify the Criteria >> All record should enter



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

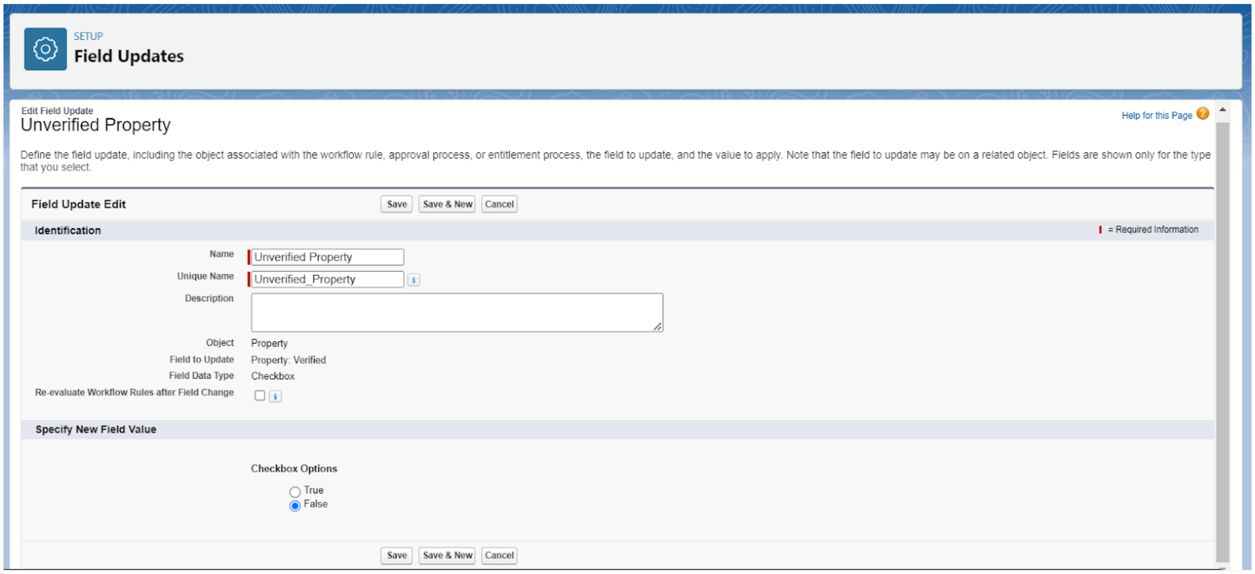
12) Add One field Update as “Verified Property”

1. Select Object >> Property
2. Field to Update >> Verified
3. Field Data Type >> CheckBox
4. Select CheckBox Option as “True”
5. Save.



13) 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.

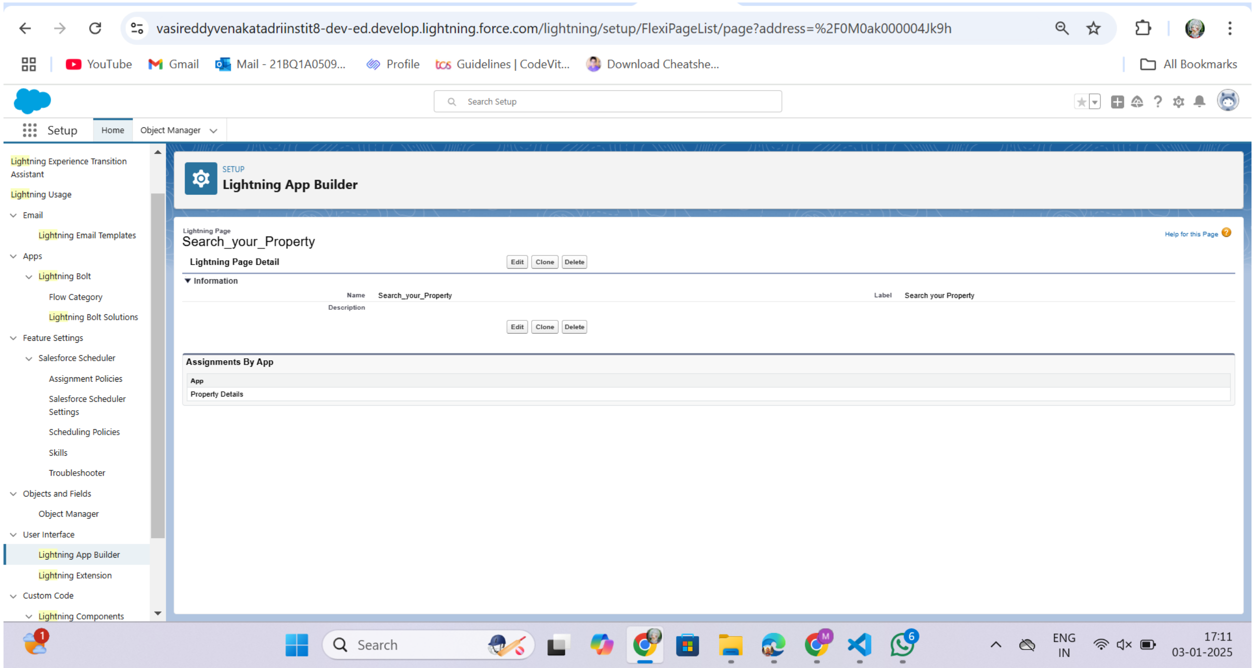


14) Activate the Approval Process.

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

A flow that can submit the records directly for approval

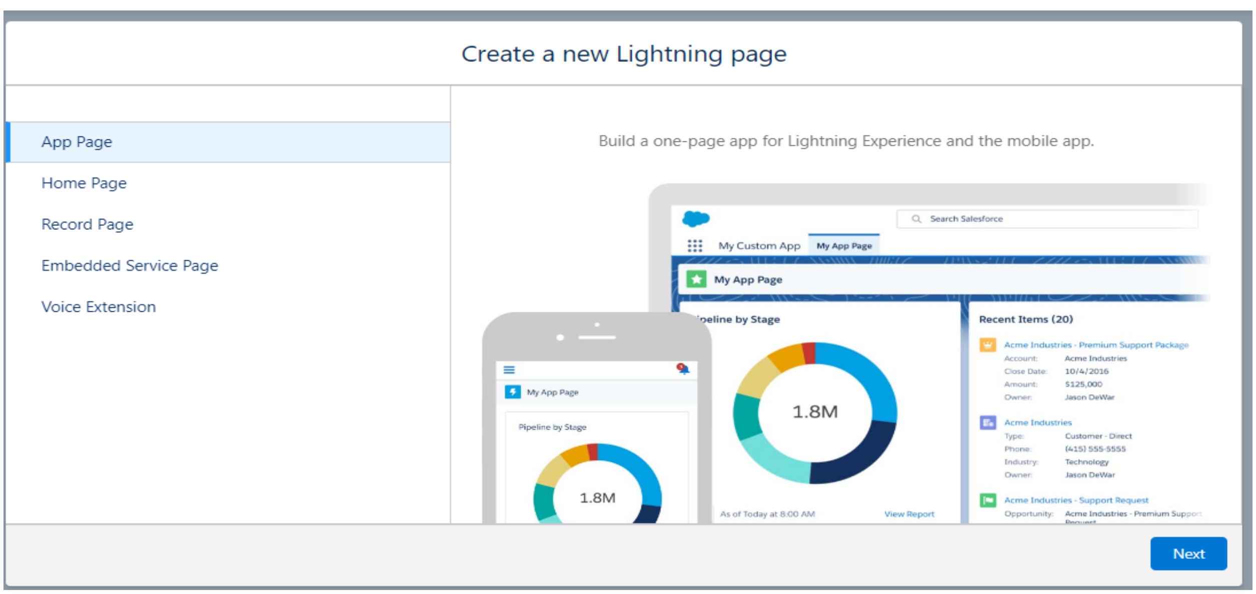
1. From Setup >> Search for Flows >> Click On New and Select “Record Trigger Flow”.
2. Select Object >> Property
3. Select “Trigger the flow when” >> “A record is created”
4. Set Entry Conditions >> “None”
5. Add a “Action” >> “Submit for Approval”
6. Give Label >> Approval for property
7. Record Id >> {!$Record.Id}
8. Done
9. Save the Flow and Give label as “Property Approval” and “Activate”



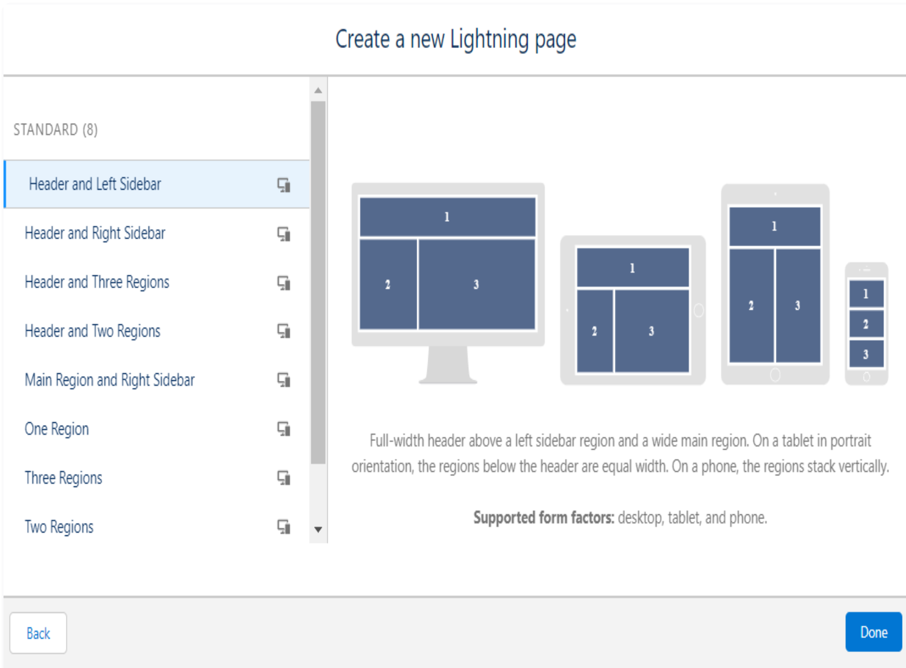
Create an App Page

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

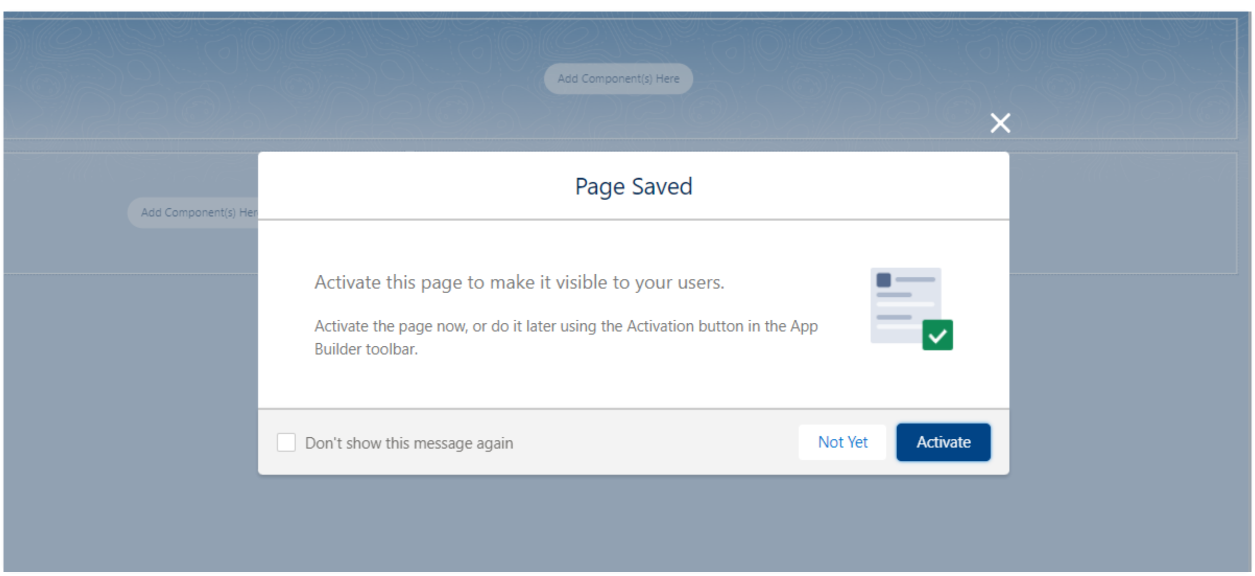
1. From Setup >> Go to Lightning App Builder >> Click on New >> Select App Page and
   Click on Next.



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

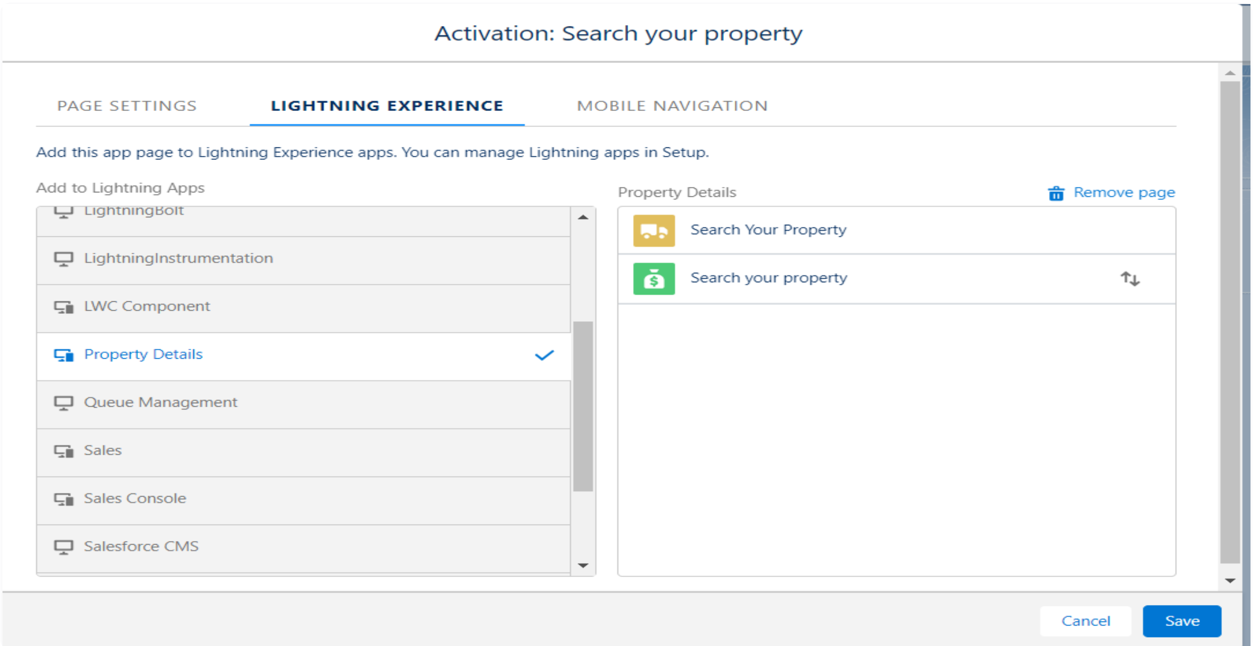


4. Click on “Save ” and then click on “Activate”.

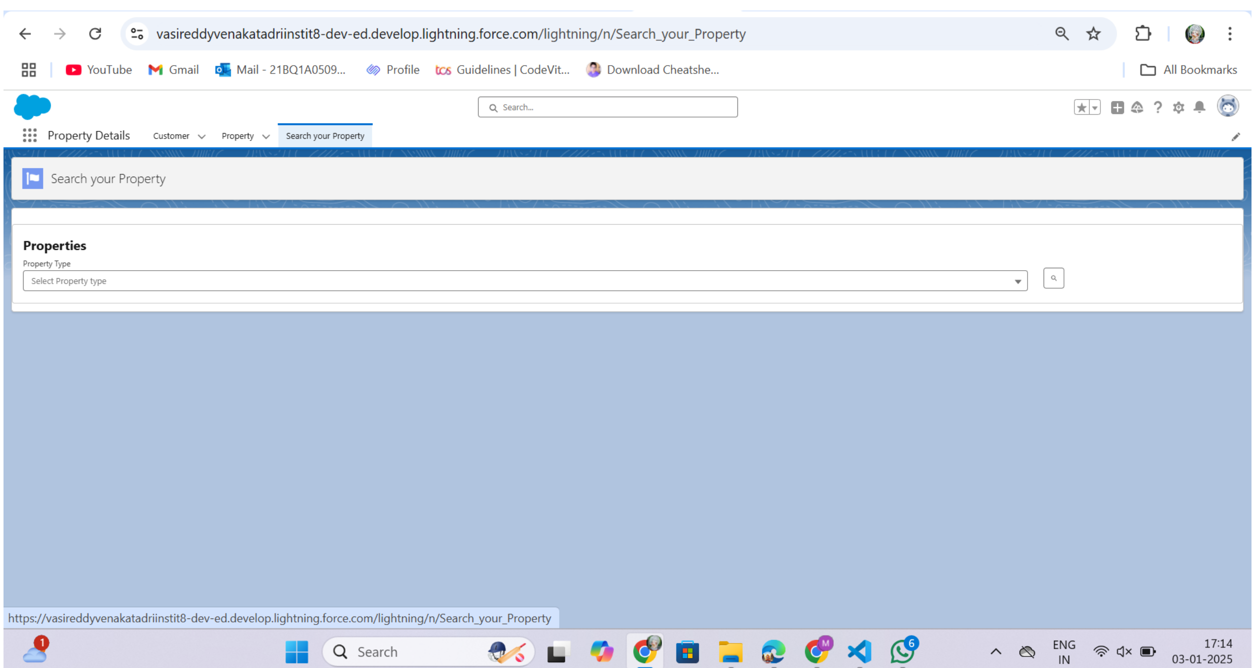


5 .From Page Setting select page activation as “Activate for all Users”.

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



6. Then Click on “Save”



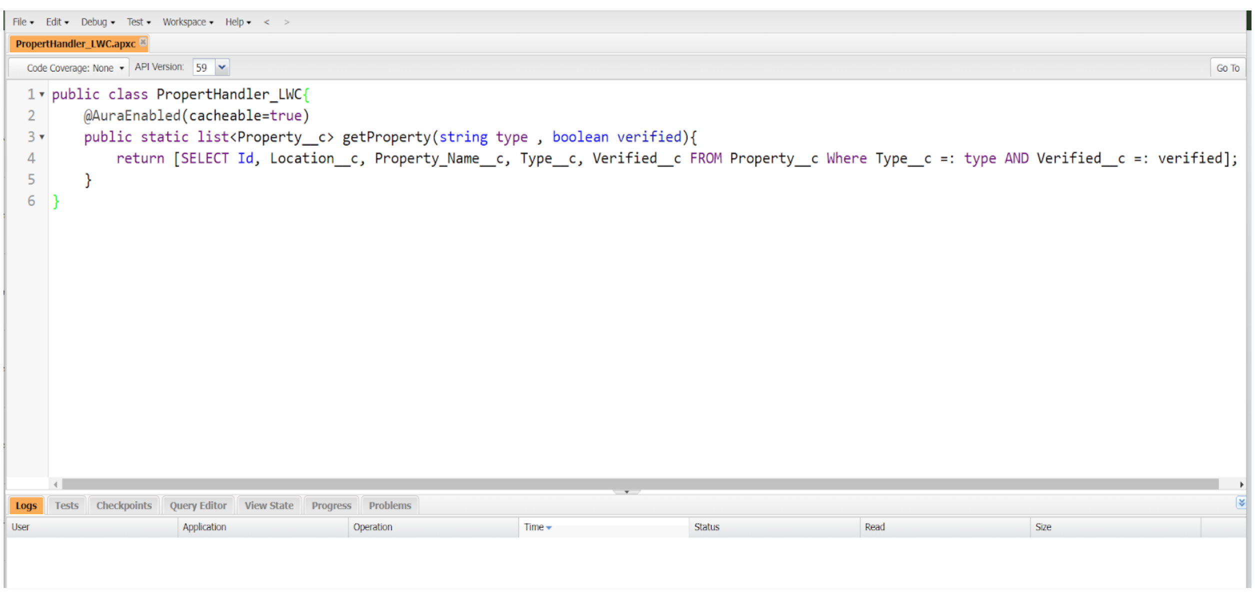
Create a LWC Component

- 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) and 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>
  <template if:true={istrue}>
   <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>
```

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)
            })
    }
}
```

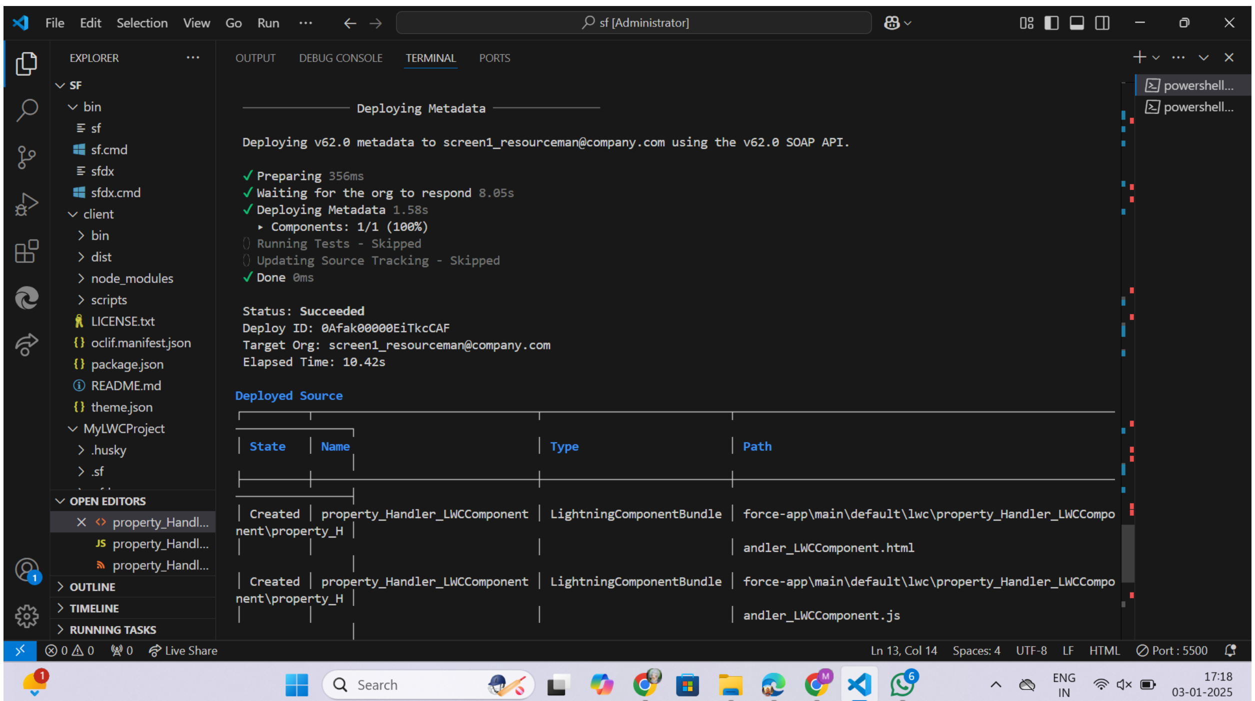
7. In Your metafile give your targets to deploy the component.

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>
```

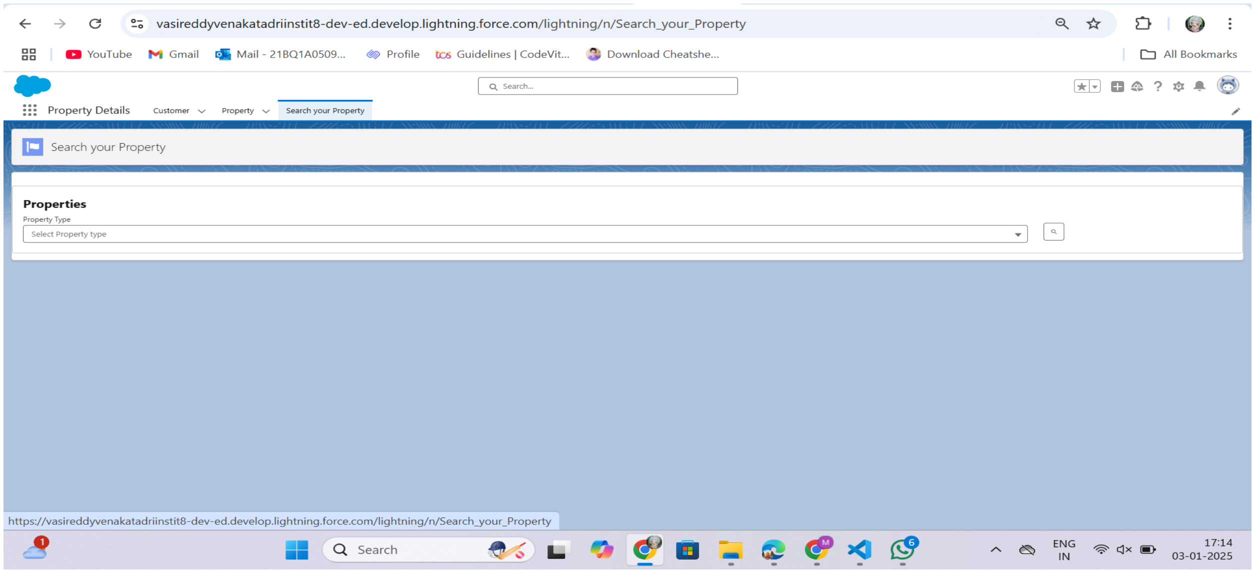
8. After Saving all the three Codes , Right Click and deploy this component to the org.



Drag this Component to your App Page

Adding the Component to your 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 the Component to your App Page and Save the Page.

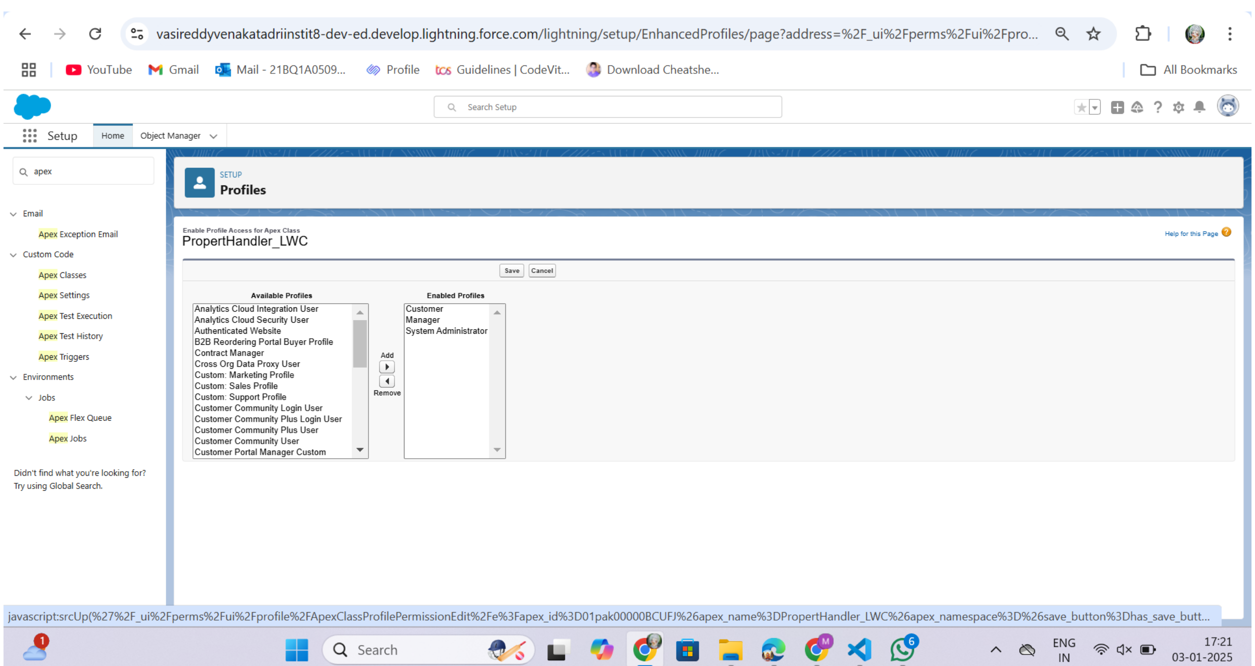


Give Access of Apex Classes to Profiles

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

1. From Setup >> Search For Apex Classes >> Click on “Security” behind “PropertyHandler__LWC”.

2. From Profiles Add “Manager” and “Customer” and “Save”.



Project Overview

The **Dreams World Properties CRM Application** is a comprehensive solution designed to streamline customer and property management processes for a real estate business. The project leverages Salesforce as the core platform and integrates tools like Jotform to automate workflows and enhance operational efficiency.
The application includes hierarchical role management, dynamic property views based on user verification status, and an automated approval system for property verification. Through the use of Lightning Web Components (LWC) and Apex, it provides a tailored experience for verified and unverified customers while ensuring secure and centralized data management.

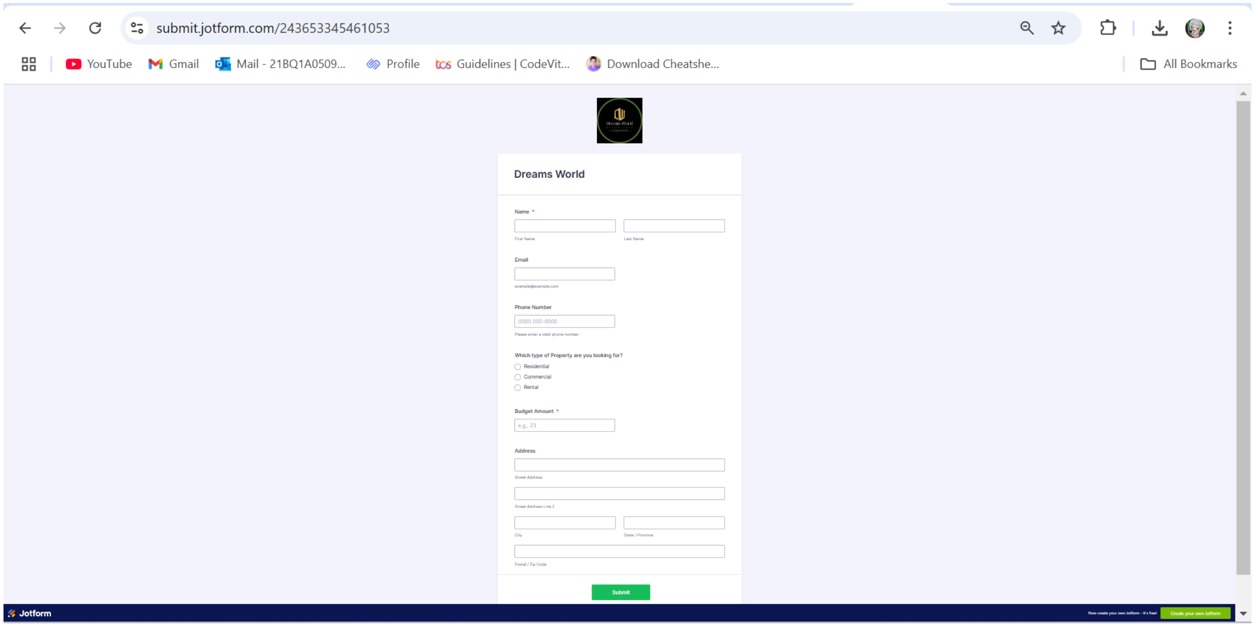
The CRM application includes the following key pages to deliver a seamless and functional user experience:

Pages of the Dreams World Properties CRM Application

The CRM application includes the following key pages to deliver a seamless and functional user experience:

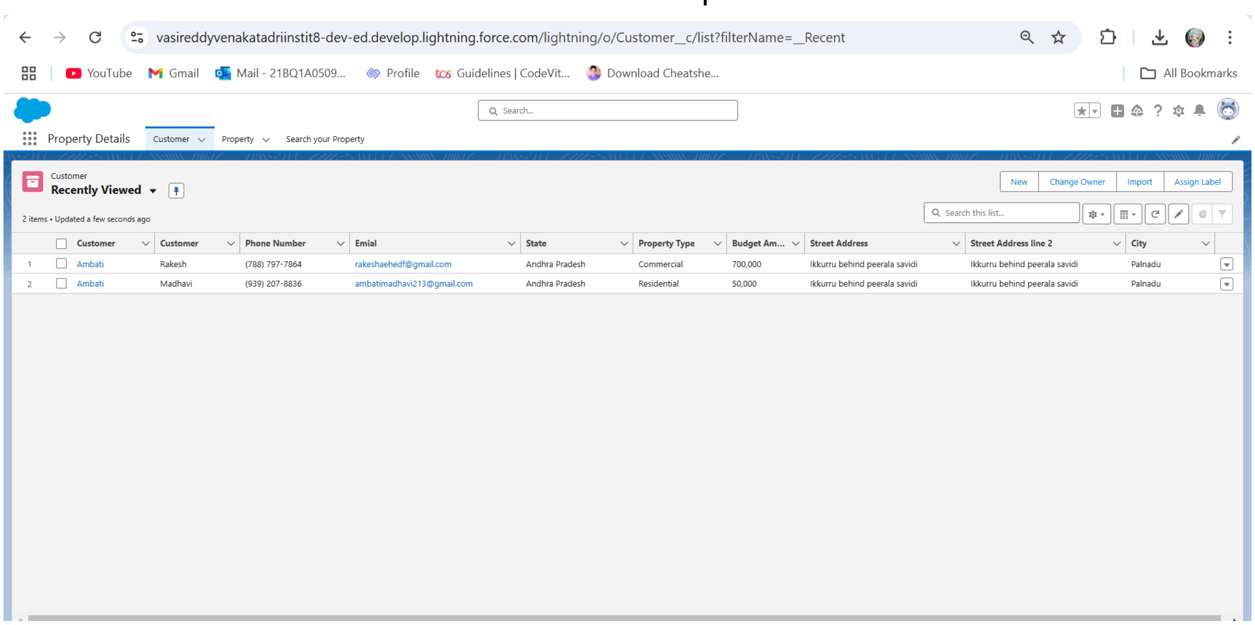
1. Home Page

- **Purpose:** Acts as the central dashboard for users to view key insights and navigate to other modules of the application.
- **Features:**
    - Overview of recently added properties and customers.
    - Notifications for pending approvals and updates.
    - Quick links to access key features like property search, approvals, and customer management.



2. Customer Management Page

- **Purpose:** To manage customer records efficiently.
- **Features:**
    - View, edit, and delete customer details.
    - Add new customer records.
    - Status indicators for verified and unverified customers.
    - Search and filter functionalities for quick access.



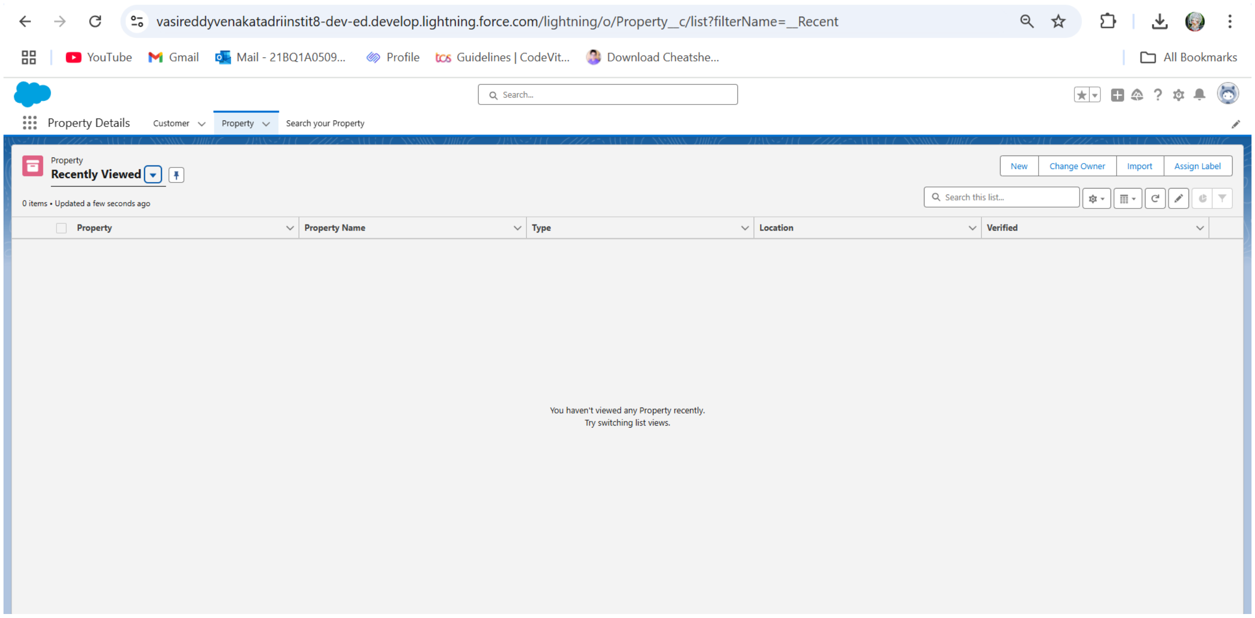
3. Property Management Page

- **Purpose:** Provides a comprehensive interface for managing property details.
- **Features:**

- List of all properties with key details like location, type, and price.
- Options to add, edit, or delete property records.
- Verification

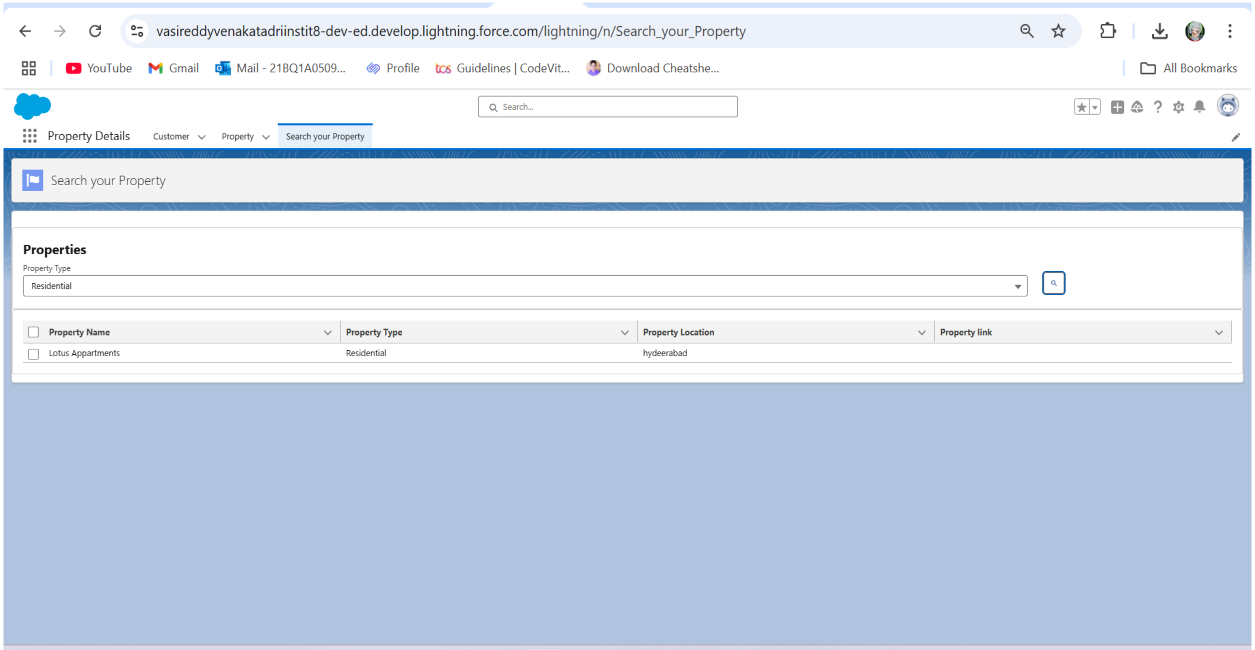
status displayed for each property.

- Filters to sort properties by type, location, or verification status.



4. Search Your Property Page

- **Purpose:**
  Enables users to search and view properties dynamically based on their preferences and verification status.
- **Features:**
  - Combobox for selecting property types (e.g., Residential, Commercial).
  - Data table displaying properties tailored to the user's verification status.
  - Conditional rendering:
    - Verified customers see all property details.
    - Unverified customers see limited property details.



5. Property Approval Page

- **Purpose:**
  Streamlines the approval process for verifying property records.
- **Features:**
  - Displays a list of properties pending approval.
  - Step-by-step approval workflow for managers and executives.
  - Status updates (Approved/Rejected) with automated field updates.

6. User Profile Management Page

- **Purpose:**
  Allows users to view and manage their profile information.
- **Features:**
  - Display of user roles and permissions.
  - Option to update personal information.
  - Status of user verification (verified or unverified).

7. Settings Page

- **Purpose:**
  Enables administrators to configure the application settings.
- **Features:**
  - Role and profile management.
  - Customization options for property types, approval criteria, and notification preferences.
  - Integration settings for external tools like Jotform.

Custom Pages for Specific Roles

- **Sales Manager:**
  - A tailored dashboard highlighting pending approvals and property insights.
- **Sales Executive:**
  - Quick access to new leads and tasks assigned for follow-up.
- **Customer:**
  - Simplified interface to browse properties and track approval status.