A CRM Application to Handle the Client and their Property Related Requirements

Submitted By:

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Project Overview:

A **Customer Relationship Management (CRM) application** designed specifically to handle client andproperty-related requirements can significantly enhance operational efficiency, foster better client interactions, and streamline property management processes.

This CRM application is a comprehensive tool tailored tomeet the needs of businesses in the real estate and property management sector. It provides a centralized platform to manage client information, track property listings, monitor
client inquiries, and streamline communication. Theapplication also enables businesses to analyze client
preferences, ensuring a personalized experience that buildstrust and long-term relationships.

With features such as automated workflows, robust reporting, and seamless integration capabilities, this CRM serves as a bridge between client expectations and service delivery. By using this application, businesses can focus onbuilding meaningful relationships with clients while
efficiently managing property-related operations.

This introduction emphasizes the core purpose of theCRM Application—streamlining client and property
management for enhanced business outcomes.

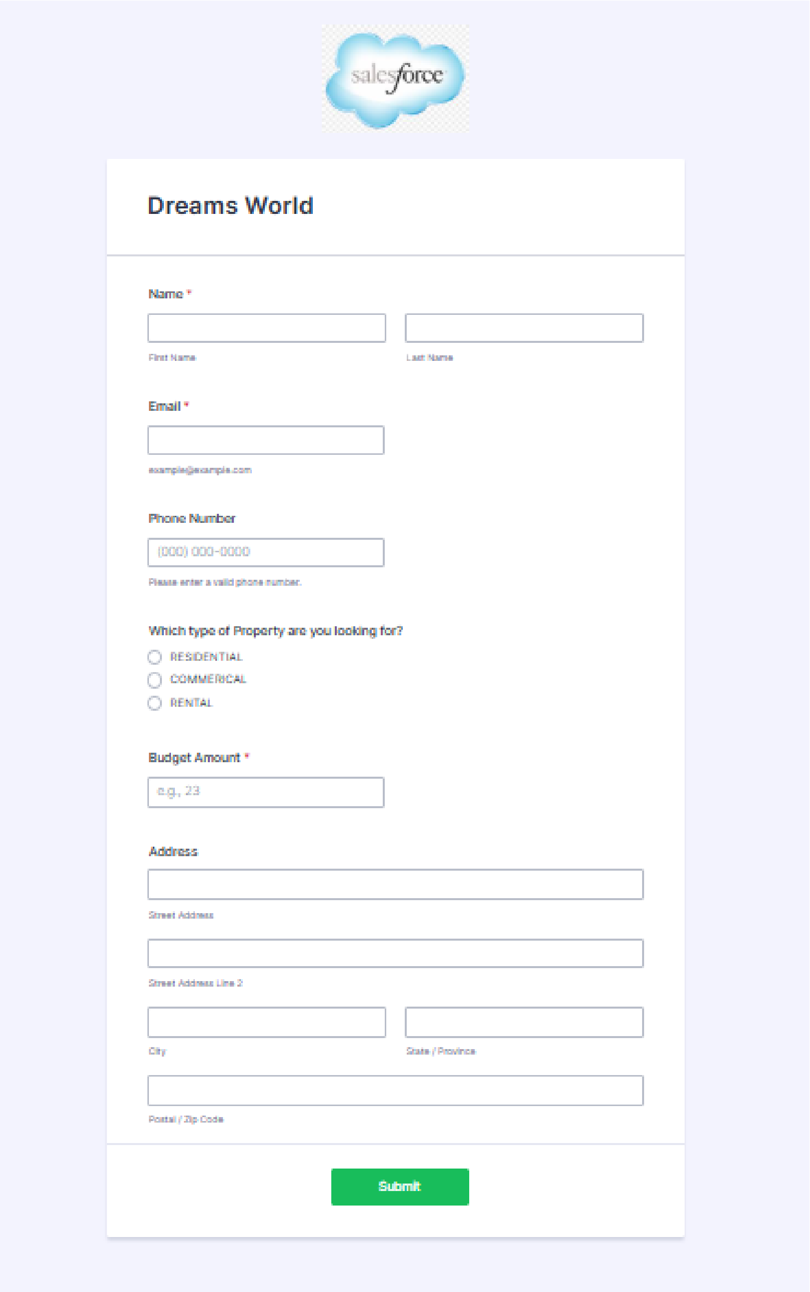
Task 1: Milestone 1 :- Create a Jotform and integrate it with the orgto create a record of customers automatically.

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

Activity : 1

Creating a form to get the Customer detail like Name, Phone, Email,Which type of Property are you looking for ?, Budget amount and Address.

My form : https://form.jotform.com/243132807961053



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
○ COMMERICAL
○ RENTAL

Budget Amount *

e.g., 23

Address

Street Address

Street Address Line 2

City

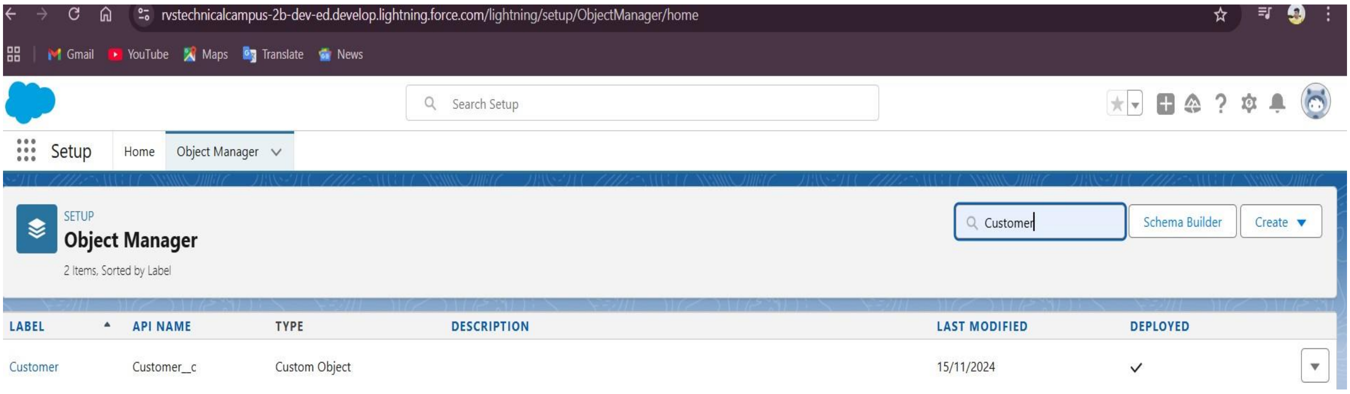
State / Province

Postal / Zip Code

Task 2 : Create Objects from Spreadsheet.

Directly Creating Objects from Spreadsheet in Salesforce.

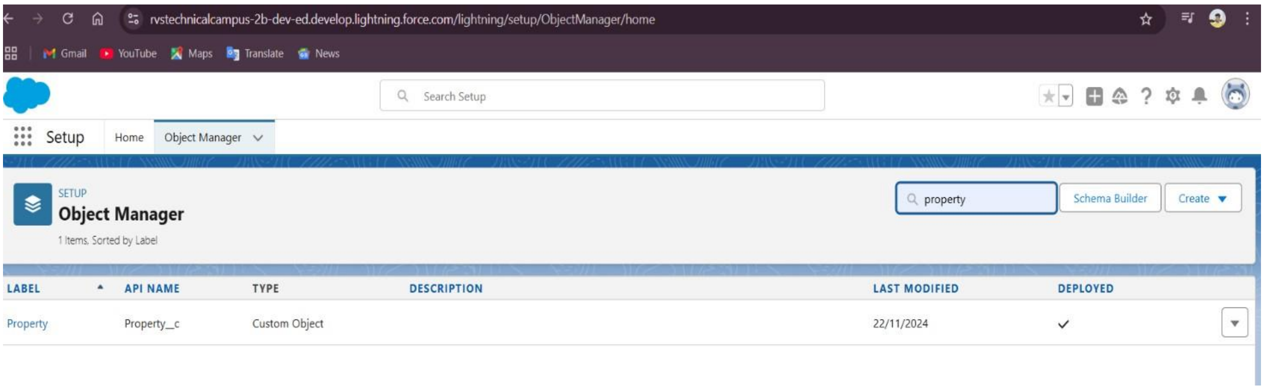
- **Create Customer object**



2 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer__c	Custom Object		15/11/2024	✓

- Create Property object



1 Items, Sorted by Label

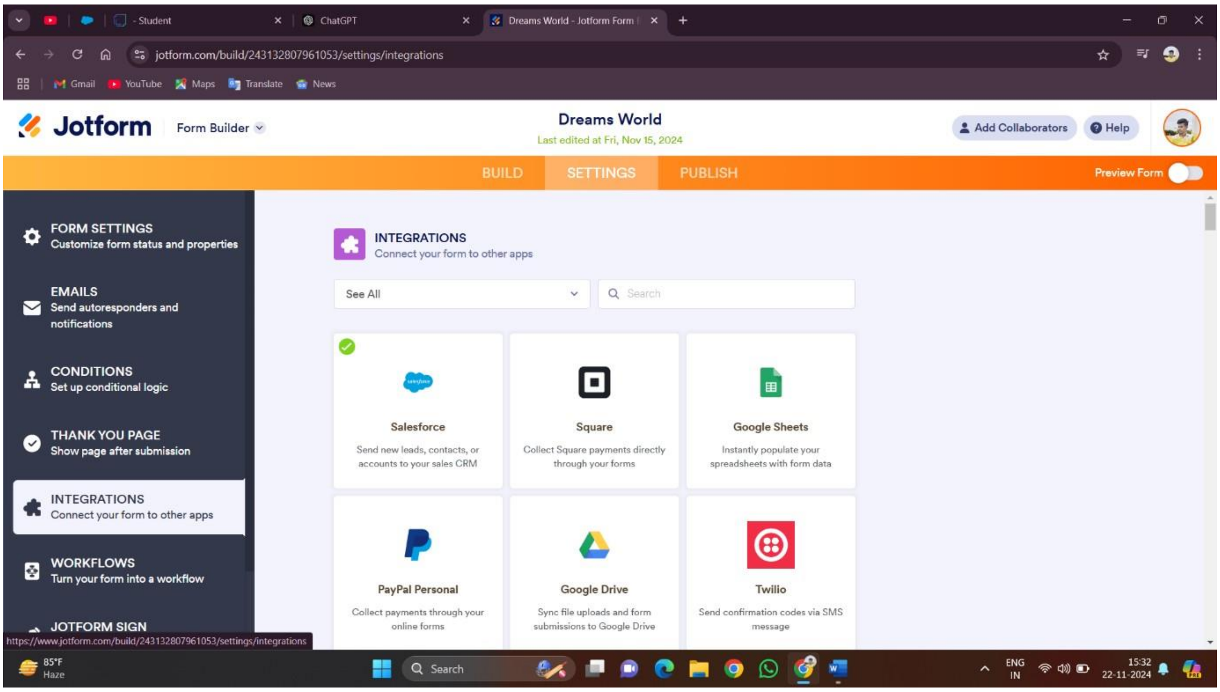
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Property	Property__c	Custom Object		22/11/2024	✓

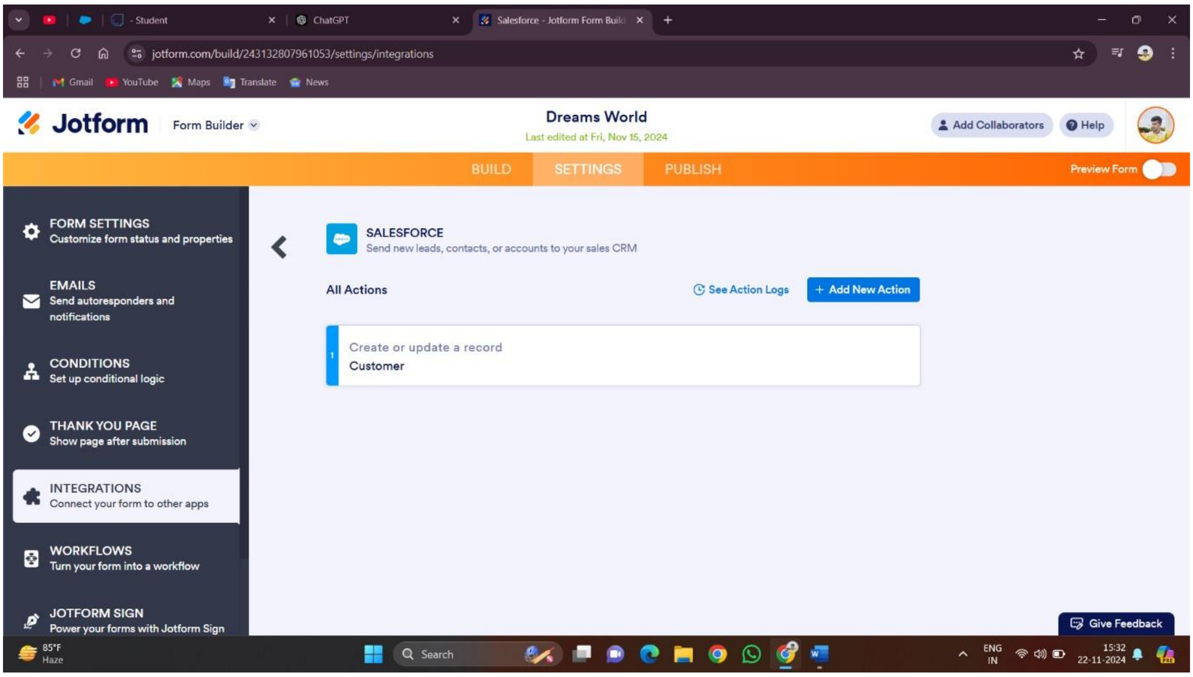
Task 3 : Integrate Jotform with Salesforce Platform.

In this Milestone we are going to integrate jotform with Salesforce.

Activity : 1

Integrate Jotform with Salesforce to create Customer records.



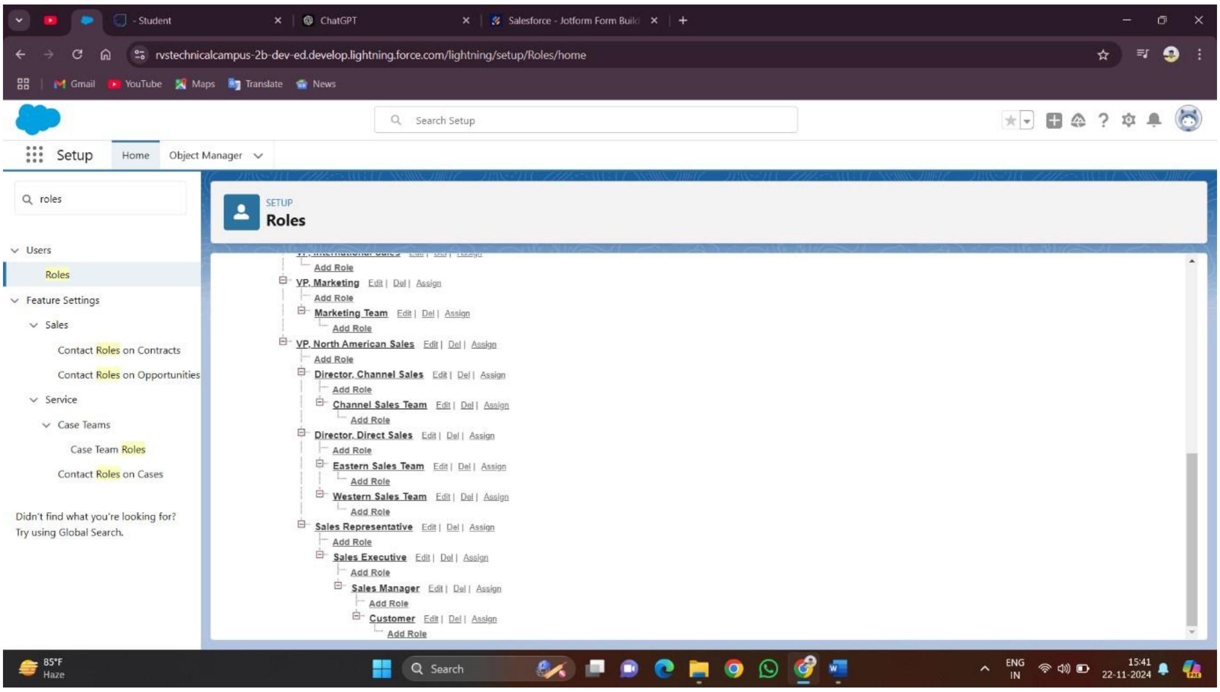


Create or update a record
Customer

Task 4 : Create Roles- Create Roles as per business requirenment.

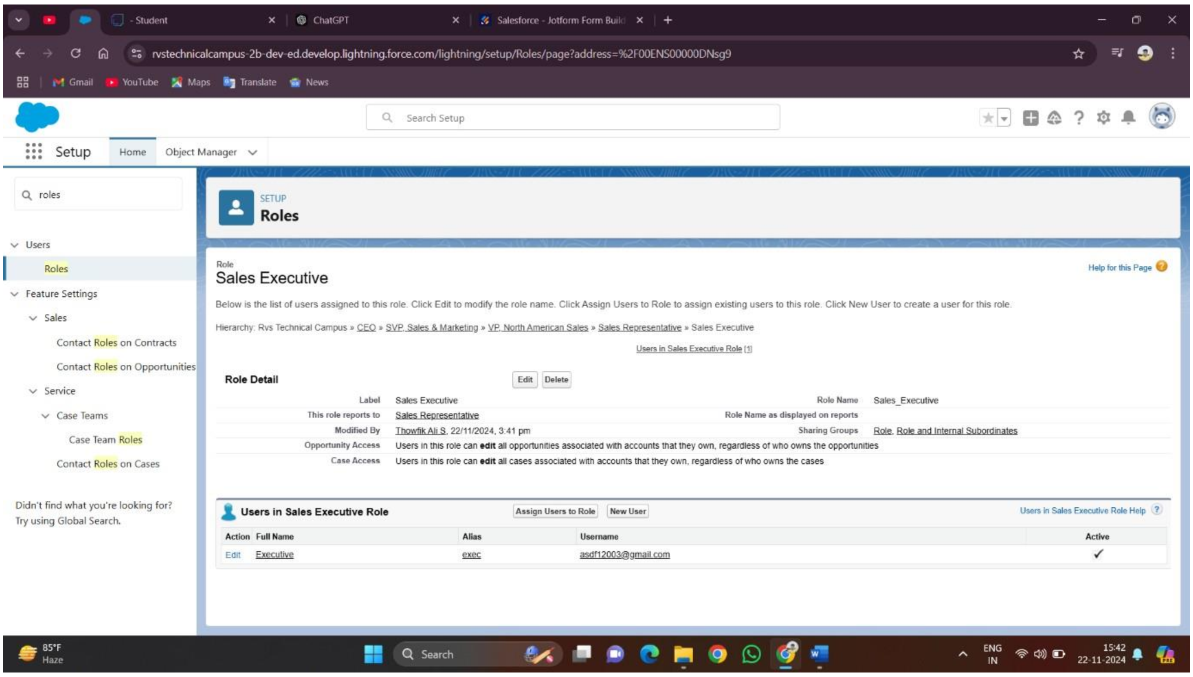
Sales Executive Role:

Create a hierarchical role structure in Salesforce: Sales Executive below Sales



- Add Role
- VP, Marketing Edit | Del | Assign
  - Add Role
  - Marketing Team Edit | Del | Assign
    - Add Role
- VP, North American Sales Edit | Del | Assign
  - Add Role
  - Director, Channel Sales Edit | Del | Assign
    - Add Role
    - Channel Sales Team Edit | Del | Assign
      - Add Role
  - Director, Direct Sales Edit | Del | Assign
    - Add Role
    - Eastern Sales Team Edit | Del | Assign
      - Add Role
    - Western Sales Team Edit | Del | Assign
      - Add Role
  - Sales Representative Edit | Del | Assign
    - Add Role
    - Sales Executive Edit | Del | Assign
      - Add Role
      - Sales Manager Edit | Del | Assign
        - Add Role
        - Customer Edit | Del | Assign
          - Add Role

- Sales Executive



Role
Sales Executive

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Rvs Technical Campus » CEO » SVP, Sales & Marketing » VP, North American Sales » Sales Representative » Sales Executive

Users in Sales Executive Role [1]

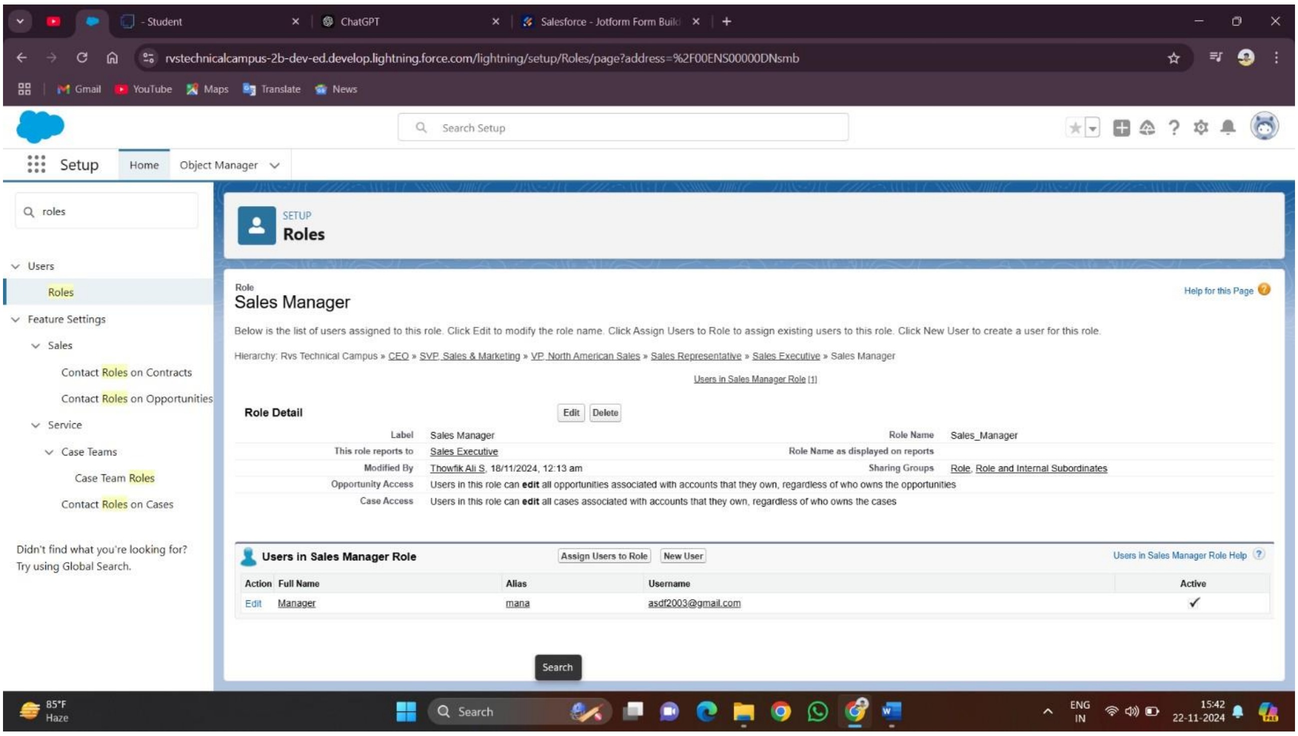
Role Detail

Label	Sales Executive	Role Name	Sales_Executive
This role reports to	Sales Representative	Role Name as displayed on reports	
Modified By	Thowfik Ali S, 22/11/2024, 3:41 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases		

Users in Sales Executive Role

Action	Full Name	Alias	Username	Active
Edit	Executive	exec	asdf12003@gmail.com	✓

- Sales Manager



Role
Sales Manager

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Rvs Technical Campus » CEO » SVP, Sales & Marketing » VP, North American Sales » Sales Representative » Sales Executive » Sales Manager

Users in Sales Manager Role [1]

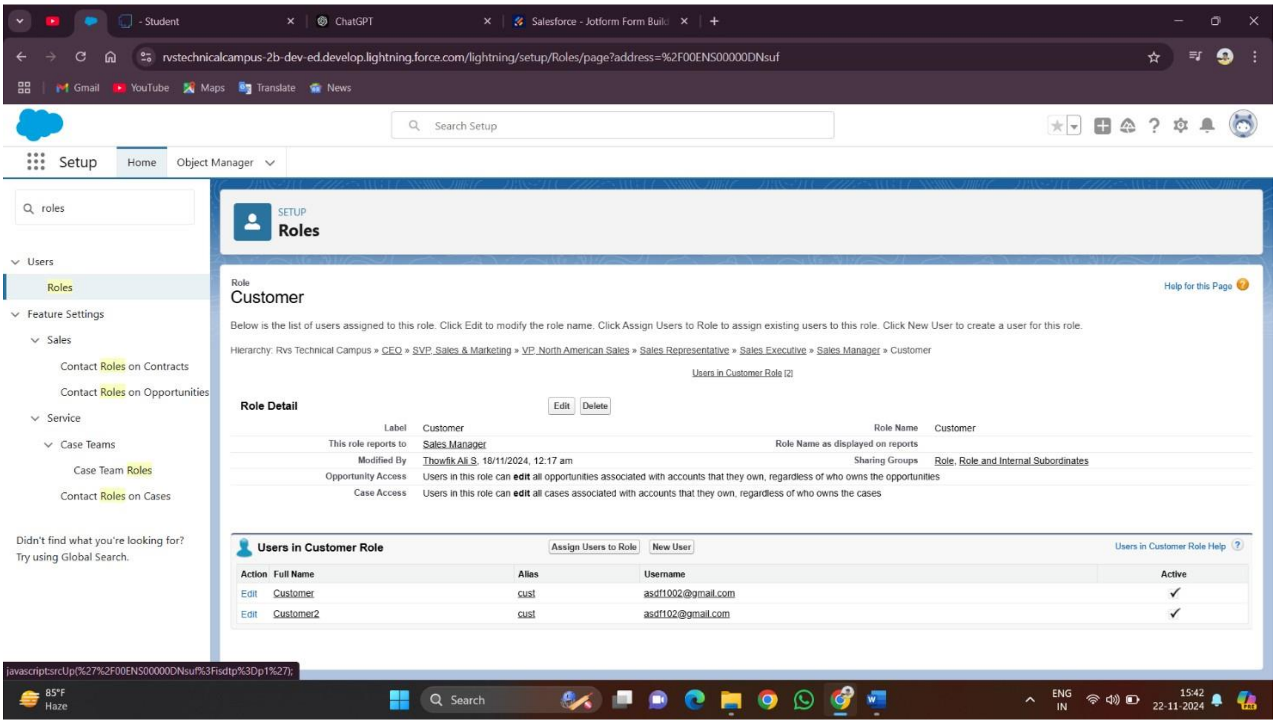
Role Detail

Label: Sales Manager
Role Name: Sales_Manager
This role reports to: Sales Executive
Role Name as displayed on reports:
Modified By: Thowfik Ali S, 18/11/2024, 12:13 am
Sharing Groups: Role, Role and Internal Subordinates
Opportunity Access: Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access: Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases

Users in Sales Manager Role

Action	Full Name	Alias	Username	Active
Edit	Manager	mana	asdf2003@gmail.com	✓

- Customer



Role
Customer

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Rvs Technical Campus » CEO » SVP, Sales & Marketing » VP, North American Sales » Sales Representative » Sales Executive » Sales Manager » Customer

Users in Customer Role [2]

Role Detail

Label: Customer
Role Name: Customer
This role reports to: Sales Manager
Role Name as displayed on reports:
Modified By: Thowfik Ali S, 18/11/2024, 12:17 am
Sharing Groups: Role, Role and Internal Subordinates
Opportunity Access: Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access: Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases

Users in Customer Role

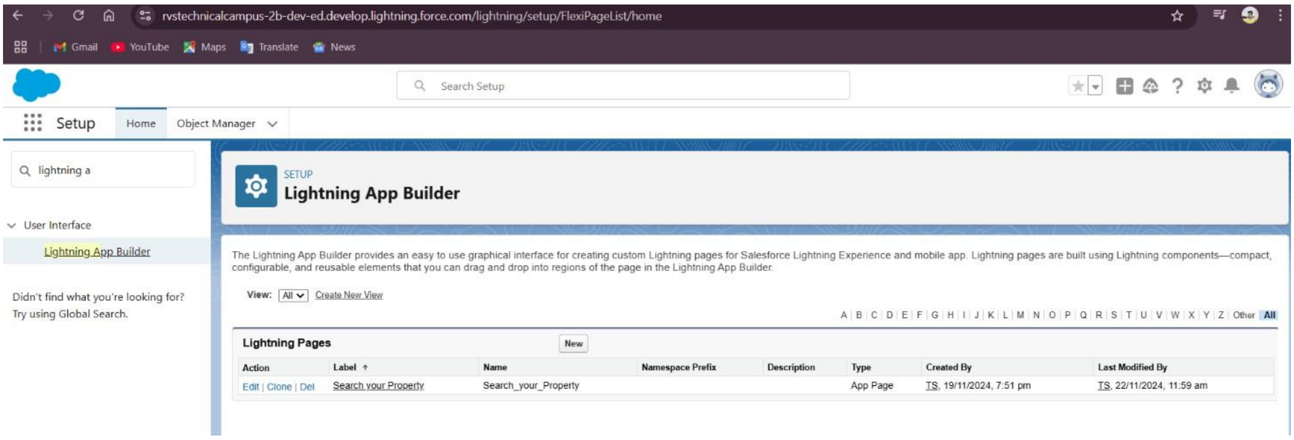
Action	Full Name	Alias	Username	Active
Edit	Customer	cust	asdf1002@gmail.com	✓
Edit	Customer2	cust	asdf102@gmail.com	✓

Task 5 : Create a Property Details App.

An App where the objects will be displayed.

Activity : 1

Create a new Lightning App named "Property Details" and add "Customer" and "Property" Object.



Didn't find what you're looking for? Try using Global Search.

The Lightning App Builder provides an easy to use graphical interface for creating custom Lightning pages for Salesforce Lightning Experience and mobile app. Lightning pages are built using Lightning components—compact, configurable, and reusable elements that you can drag and drop into regions of the page in the Lightning App Builder.

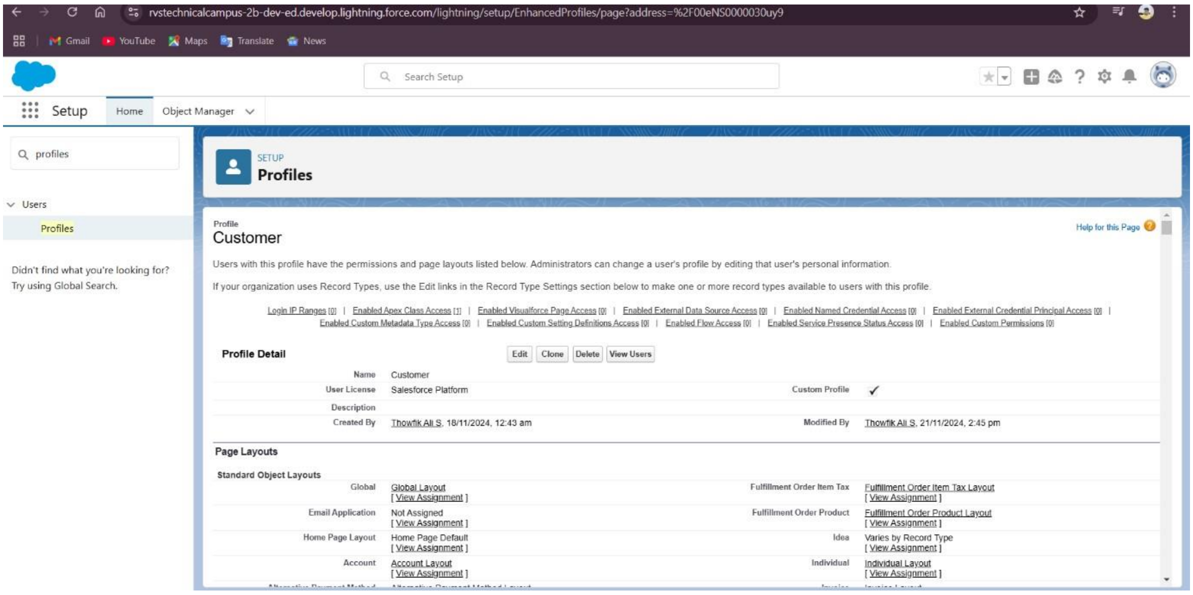
Lightning Pages

Action	Label ↑	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit | Clone | Del	Search your Property	Search_your_Property			App Page	TS, 19/11/2024, 7:51 pm	TS, 22/11/2024, 11:59 am

Task 6 : Create Profiles.

Create profiles as per business requirement.

- **Customer** – Clone the Salesforce Platform User profile, name it "Customer", adjust custom app settings to include only Property Details,remove all standard object permission, and set read and view all permission for the Property object.



Didn't find what you're looking for? Try using Global Search.

Profile
Customer

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [1] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

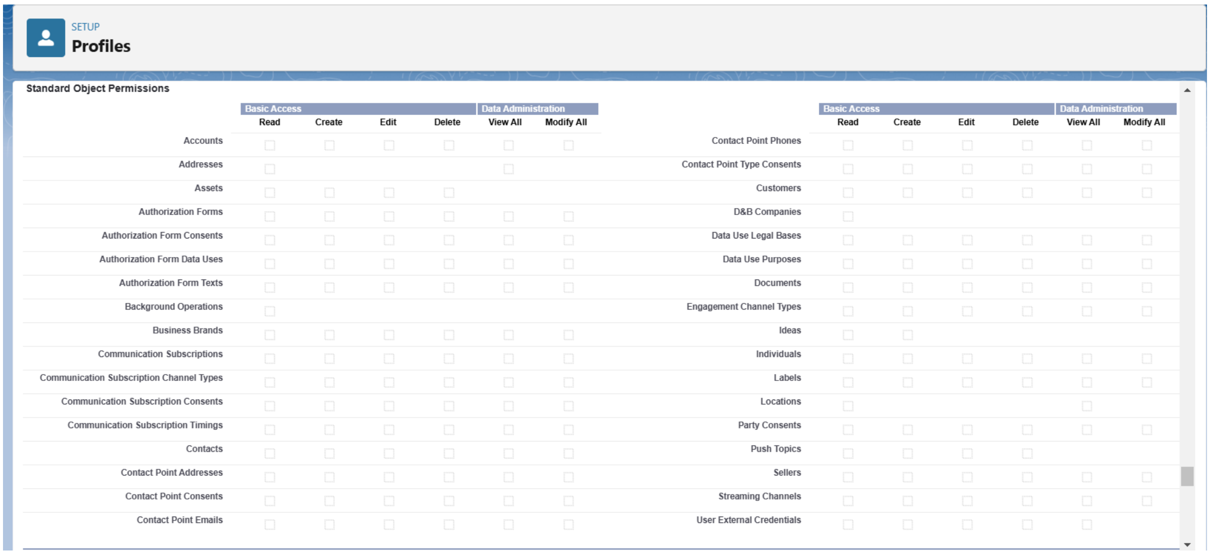
Profile Detail

Name	Customer		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	Thowfik Ali S, 18/11/2024, 12:43 am	Modified By	Thowfik Ali S, 21/11/2024, 2:45 pm

Page Layouts

Standard Object Layouts

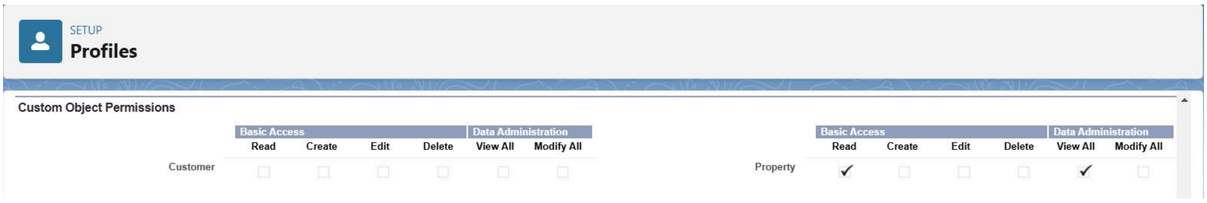
Global	Global Layout [View Assignment]	Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Fulfillment Order Product	Fulfillment Order Product Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Idea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



Standard Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	☐	☐	☐	☐	☐	☐
Addresses	☐				☐	
Assets	☐	☐	☐	☐		
Authorization Forms	☐	☐	☐	☐	☐	☐
Authorization Form Consents	☐	☐	☐	☐	☐	☐
Authorization Form Data Uses	☐	☐	☐	☐	☐	☐
Authorization Form Texts	☐	☐	☐	☐	☐	☐
Background Operations	☐					
Business Brands	☐	☐	☐	☐	☐	☐
Communication Subscriptions	☐	☐	☐	☐	☐	☐
Communication Subscription Channel Types	☐	☐	☐	☐	☐	☐
Communication Subscription Consents	☐	☐	☐	☐	☐	☐
Communication Subscription Timings	☐	☐	☐	☐	☐	☐
Contacts	☐	☐	☐	☐	☐	☐
Contact Point Addresses	☐	☐	☐	☐	☐	☐
Contact Point Consents	☐	☐	☐	☐	☐	☐
Contact Point Emails	☐	☐	☐	☐	☐	☐

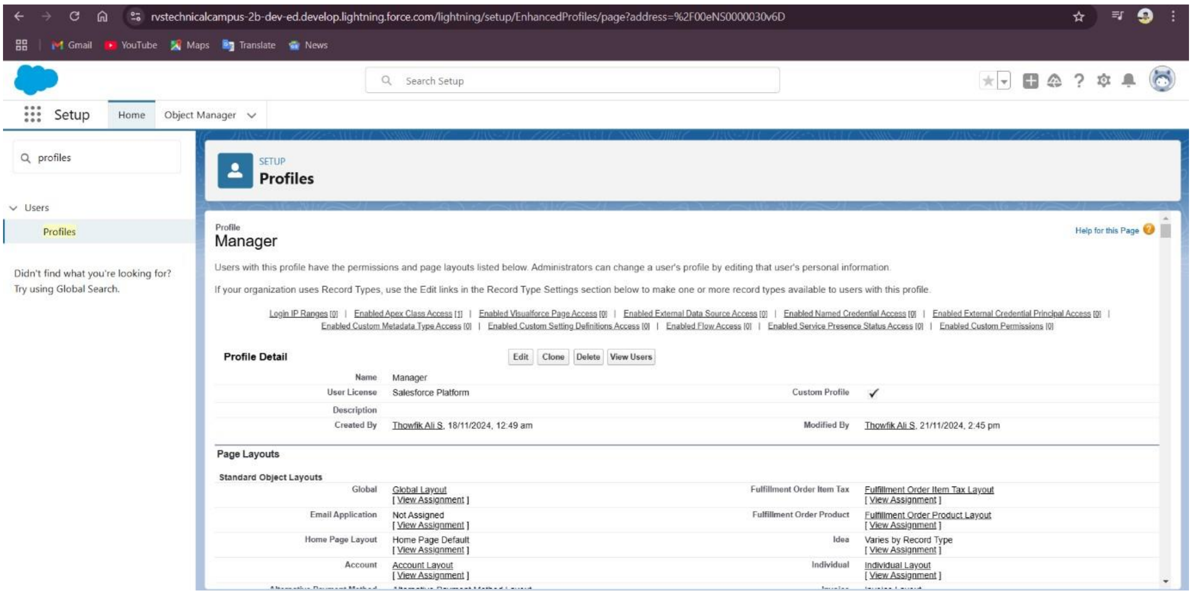
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Contact Point Phones	☐	☐	☐	☐	☐	☐
Contact Point Type Consents	☐	☐	☐	☐	☐	☐
Customers	☐	☐	☐	☐	☐	☐
D&B Companies	☐					
Data Use Legal Bases	☐	☐	☐	☐	☐	☐
Data Use Purposes	☐	☐	☐	☐	☐	☐
Documents	☐	☐	☐	☐	☐	☐
Engagement Channel Types	☐	☐	☐	☐	☐	☐
Ideas	☐	☐				
Individuals	☐	☐	☐	☐	☐	☐
Labels	☐	☐	☐	☐	☐	☐
Locations	☐				☐	
Party Consents	☐	☐	☐	☐	☐	☐
Push Topics	☐	☐	☐	☐		
Sellers	☐	☐	☐	☐	☐	☐
Streaming Channels	☐	☐	☐	☐	☐	☐
User External Credentials	☐	☐	☐	☐	☐	



Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customer	☐	☐	☐	☐	☐	☐
Property	✓	☐	☐	☐	✓	☐

- **Manager –** Clone the Salesforce Platform User profile, name it "Manager", then ensure only "Property Details" is checked in Custom App Settings, remove all Standard Object Permission, Uncheck all Custom Object Permission, and enable "Modify All" for "Property" and"Customer".



Profile
Manager

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [1] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

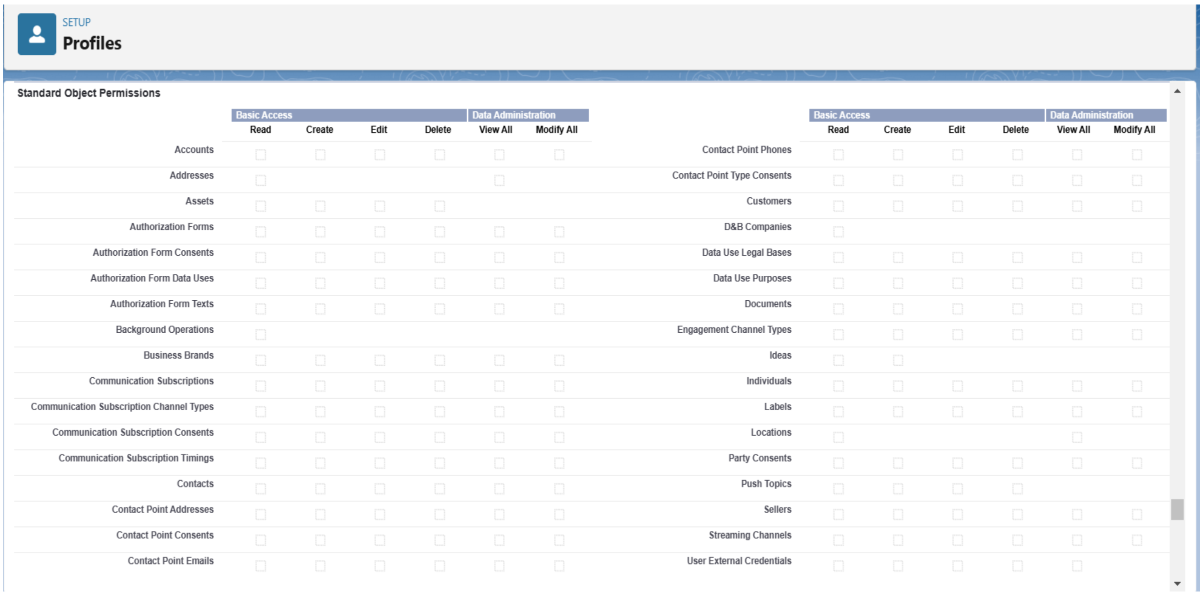
Profile Detail

Name	Manager		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	Thowfik Ali S, 18/11/2024, 12:49 am	Modified By	Thowfik Ali S, 21/11/2024, 2:45 pm

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]

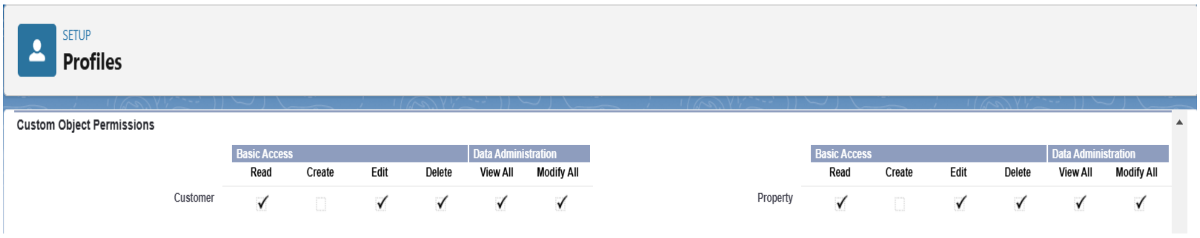


SETUP
Profiles

Standard Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	☐	☐	☐	☐	☐	☐
Addresses	☐				☐	
Assets	☐	☐	☐	☐		
Authorization Forms	☐	☐	☐	☐	☐	☐
Authorization Form Consents	☐	☐	☐	☐	☐	☐
Authorization Form Data Uses	☐	☐	☐	☐	☐	☐
Authorization Form Texts	☐	☐	☐	☐	☐	☐
Background Operations	☐					
Business Brands	☐	☐	☐	☐	☐	☐
Communication Subscriptions	☐	☐	☐	☐	☐	☐
Communication Subscription Channel Types	☐	☐	☐	☐	☐	☐
Communication Subscription Consents	☐	☐	☐	☐	☐	☐
Communication Subscription Timings	☐	☐	☐	☐	☐	☐
Contacts	☐	☐	☐	☐	☐	☐
Contact Point Addresses	☐	☐	☐	☐	☐	☐
Contact Point Consents	☐	☐	☐	☐	☐	☐
Contact Point Emails	☐	☐	☐	☐	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Contact Point Phones	☐	☐	☐	☐	☐	☐
Contact Point Type Consents	☐	☐	☐	☐	☐	☐
Customers	☐	☐	☐	☐	☐	☐
D&B Companies	☐					
Data Use Legal Bases	☐	☐	☐	☐	☐	☐
Data Use Purposes	☐	☐	☐	☐	☐	☐
Documents	☐	☐	☐	☐	☐	☐
Engagement Channel Types	☐	☐	☐	☐	☐	☐
Ideas	☐	☐				
Individuals	☐	☐	☐	☐	☐	☐
Labels	☐	☐	☐	☐	☐	☐
Locations	☐				☐	
Party Consents	☐	☐	☐	☐	☐	☐
Push Topics	☐	☐	☐	☐		
Sellers	☐	☐	☐	☐	☐	☐
Streaming Channels	☐	☐	☐	☐	☐	☐
User External Credentials	☐	☐	☐	☐	☐	



SETUP
Profiles

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customer	✓	☐	✓	✓	✓	✓

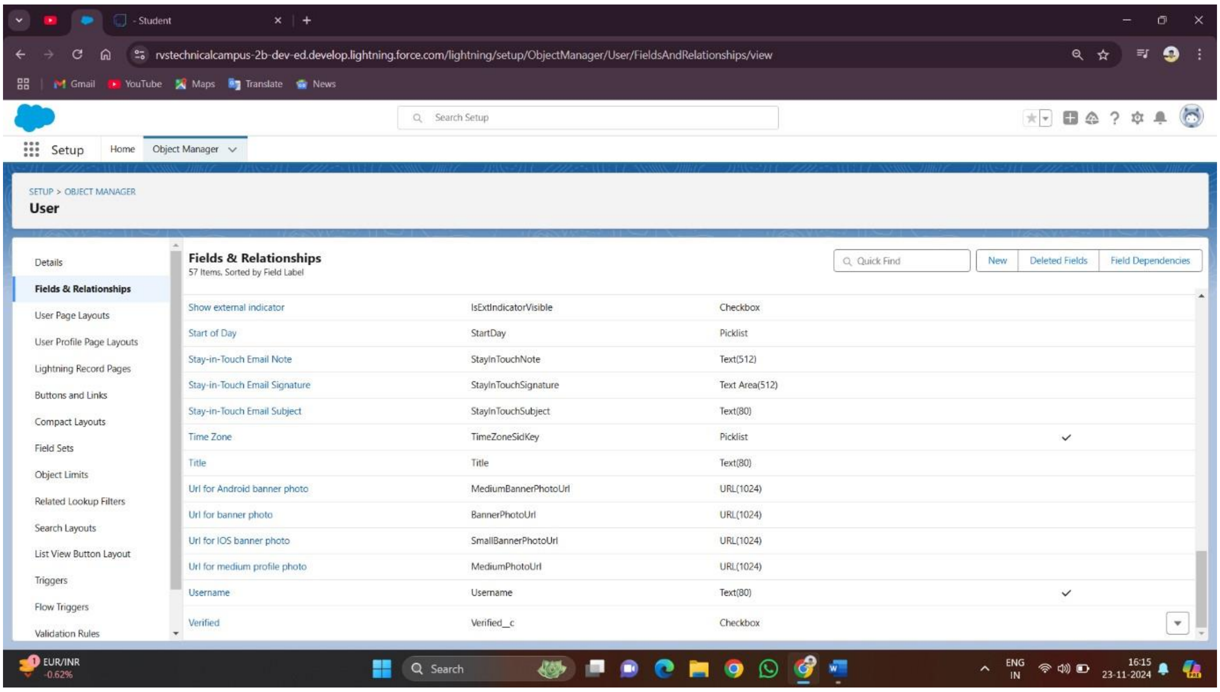
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Property	✓	☐	✓	✓	✓	✓

Task 7 : Create a Check Box field on user.13

Create Field on the User as per the business requirement.

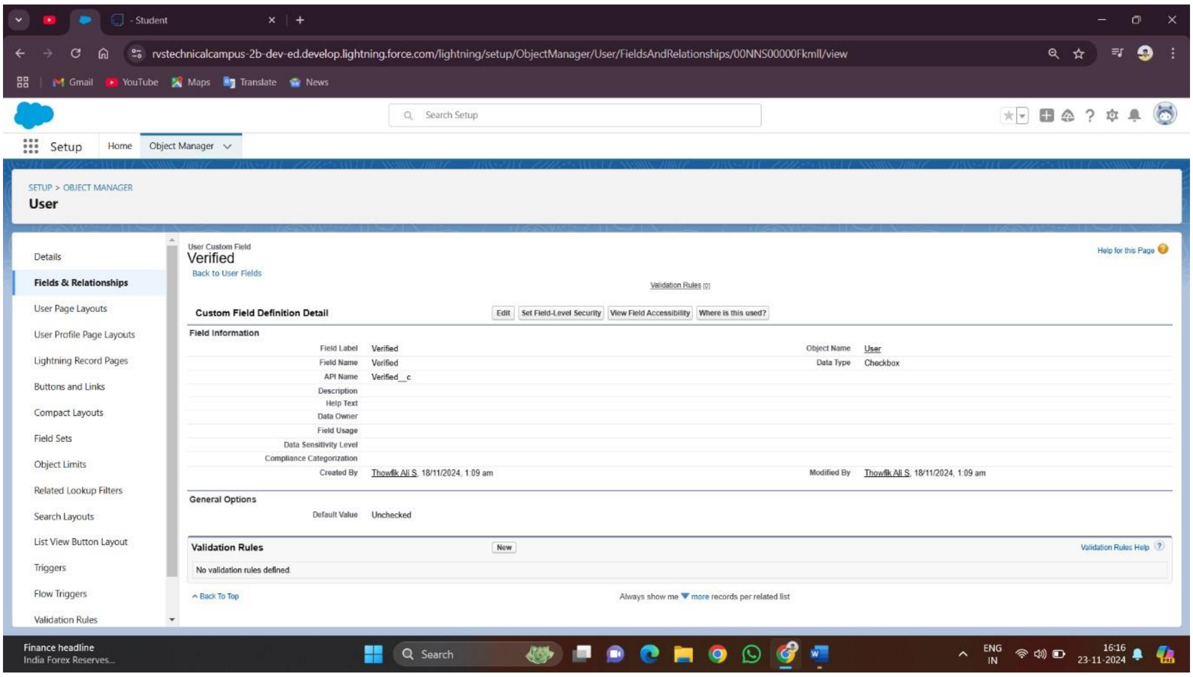
Activity : 1

In Object Manager, search for “User”, go to Fields and Relationship, and create a new field named “Verified” with the data type “Check Box”.



Fields & Relationships
57 Items, Sorted by Field Label

Show external indicator	IsExtIndicatorVisible	Checkbox	
Start of Day	StartDay	Picklist	
Stay-in-Touch Email Note	StayInTouchNote	Text(512)	
Stay-in-Touch Email Signature	StayInTouchSignature	Text Area(512)	
Stay-in-Touch Email Subject	StayInTouchSubject	Text(80)	
Time Zone	TimeZoneSidKey	Picklist	✓
Title	Title	Text(80)	
Url for Android banner photo	MediumBannerPhotoUrl	URL(1024)	
Url for banner photo	BannerPhotoUrl	URL(1024)	
Url for IOS banner photo	SmallBannerPhotoUrl	URL(1024)	
Url for medium profile photo	MediumPhotoUrl	URL(1024)	
Username	Username	Text(80)	✓
Verified	Verified__c	Checkbox	



User Custom Field
Verified
Back to User Fields

Custom Field Definition Detail

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	Thowfik Ali S, 18/11/2024, 1:09 am	Modified By	Thowfik Ali S, 18/11/2024, 1:09 am

General Options

Default Value Unchecked

Validation Rules

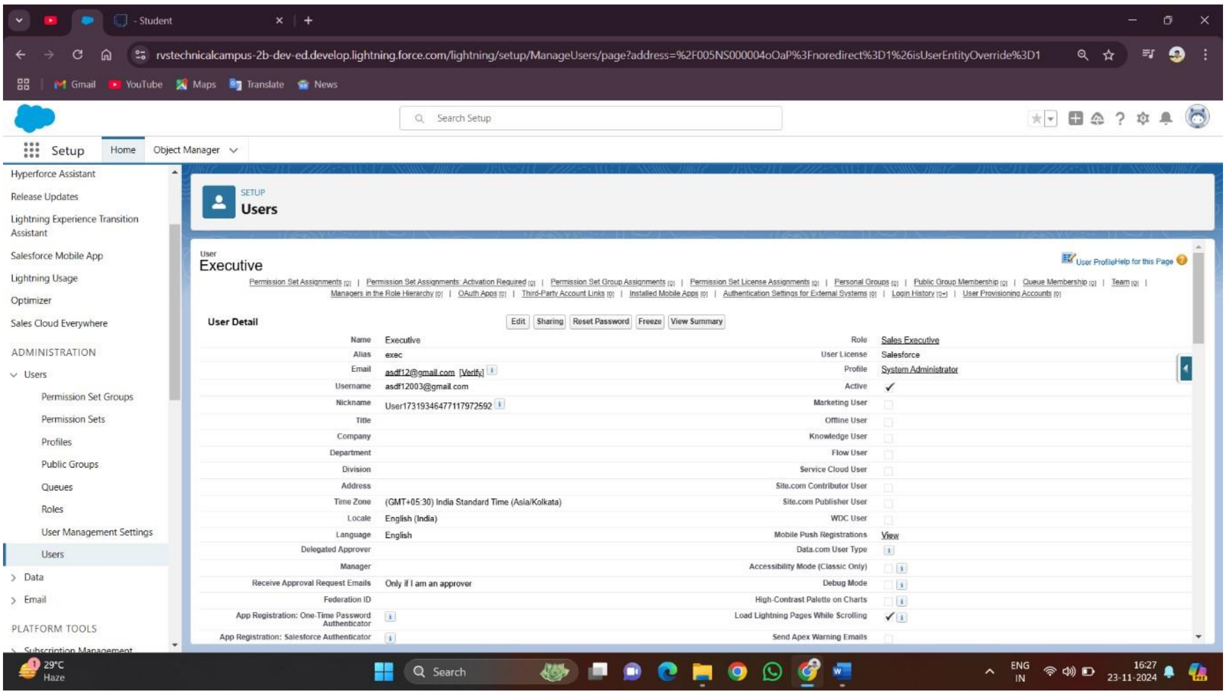
No validation rules defined.

Task 8 : Create Users.

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

User:1

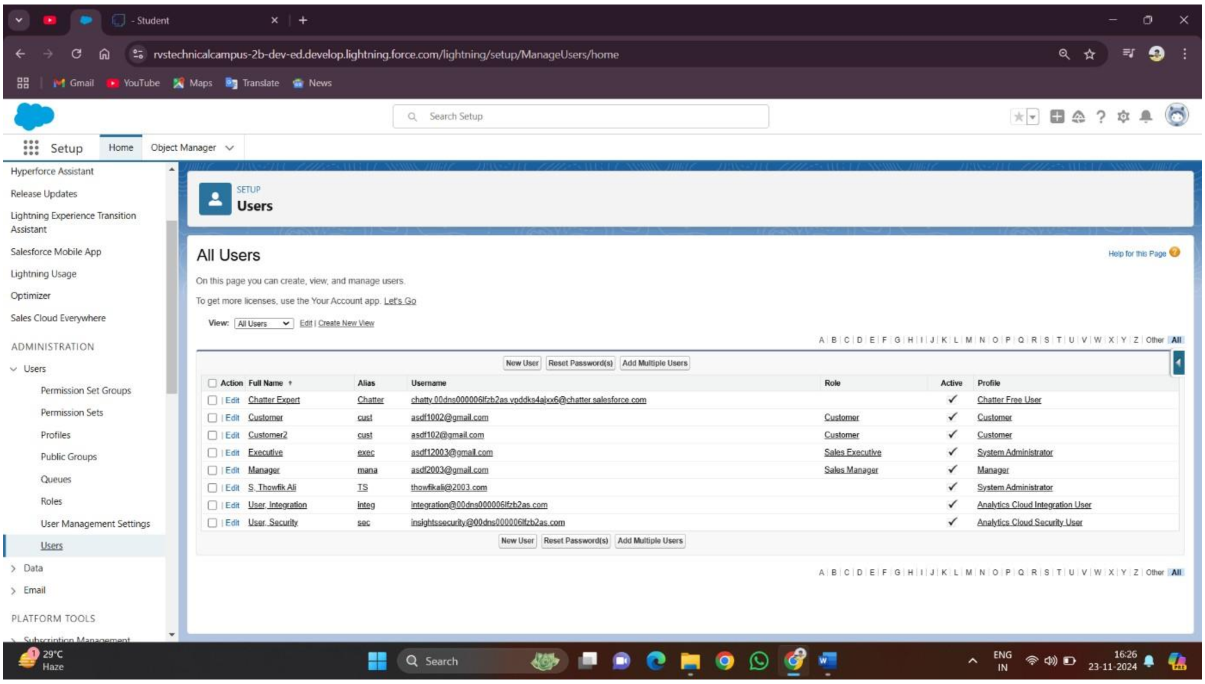
In setup navigate to Administration > Users > New User, fill in the Last Name as "Executive", set the Role to "Sales Executive", select the License as "Salesforce Platform", choose the Profile as "System Administrator", and save.



User
Executive

User Detail

Name	Executive	Role	Sales Executive
Alias	exec	User License	Salesforce
Email	asdf12@gmail.com [Verify]	Profile	System Administrator
Username	asdf12003@gmail.com	Active	✓
Nickname	User17319346477117972592	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (India)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	☐
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐
Federation ID		High-Contrast Palette on Charts	☐
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	✓
App Registration: Salesforce Authenticator		Send Apex Warning Emails	☐



All Users

On this page you can create, view, and manage users.

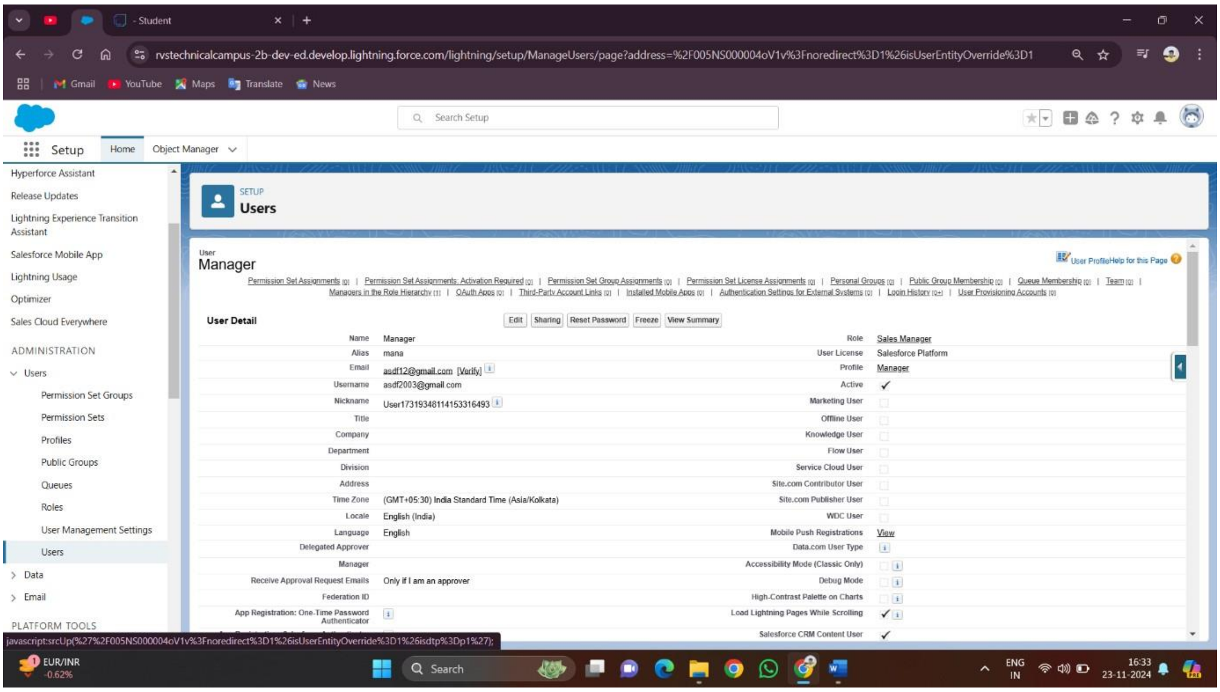
To get more licenses, use the Your Account app. Let's Go

View: All Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00dns000006lfzb2as.vpddks4ajxx6@chatter.salesforce.com		✓	Chatter Free User
Edit	Customer	cust	asdf1002@gmail.com	Customer	✓	Customer
Edit	Customer2	cust	asdf102@gmail.com	Customer	✓	Customer
Edit	Executive	exec	asdf12003@gmail.com	Sales Executive	✓	System Administrator
Edit	Manager	mana	asdf2003@gmail.com	Sales Manager	✓	Manager
Edit	S, Thowfik Ali	TS	thowfikali@2003.com		✓	System Administrator
Edit	User, Integration	integ	integration@00dns000006lfzb2as.com		✓	Analytics Cloud Integration User
Edit	User, Security	sec	insightssecurity@00dns000006lfzb2as.com		✓	Analytics Cloud Security User

User:2

In setup navigate to Administration > Users > New User, fill in the Last Nameas “Manager”, set the Role to “Sales Manager”, select the License as “Salesforce Platform”, choose the Profile as “Manager”, and save.



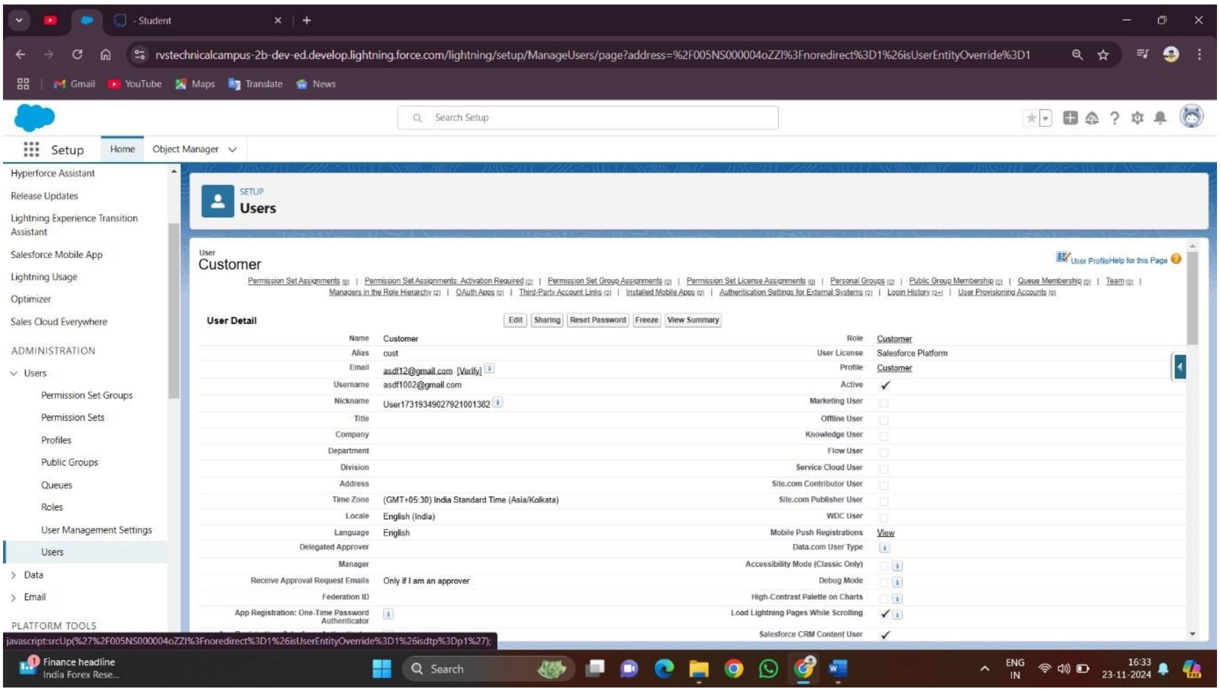
User
Manager

User Detail

Name	Manager	Role	Sales Manager
Alias	mana	User License	Salesforce Platform
Email	asdf12@gmail.com [Verify]	Profile	Manager
Username	asdf2003@gmail.com	Active	✓
Nickname	User17319348114153316493	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (India)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	☐
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐
Federation ID		High-Contrast Palette on Charts	☐
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	✓
		Salesforce CRM Content User	✓

User:3

In setup navigate to Administration > Users > New User, fill in the Last Name as “Customer”, set the Role to “Customer”, select the License as “Salesforce Platform”, choose the Profile as “Customer”, ensure the “Verified” check box isunchecked, and save.



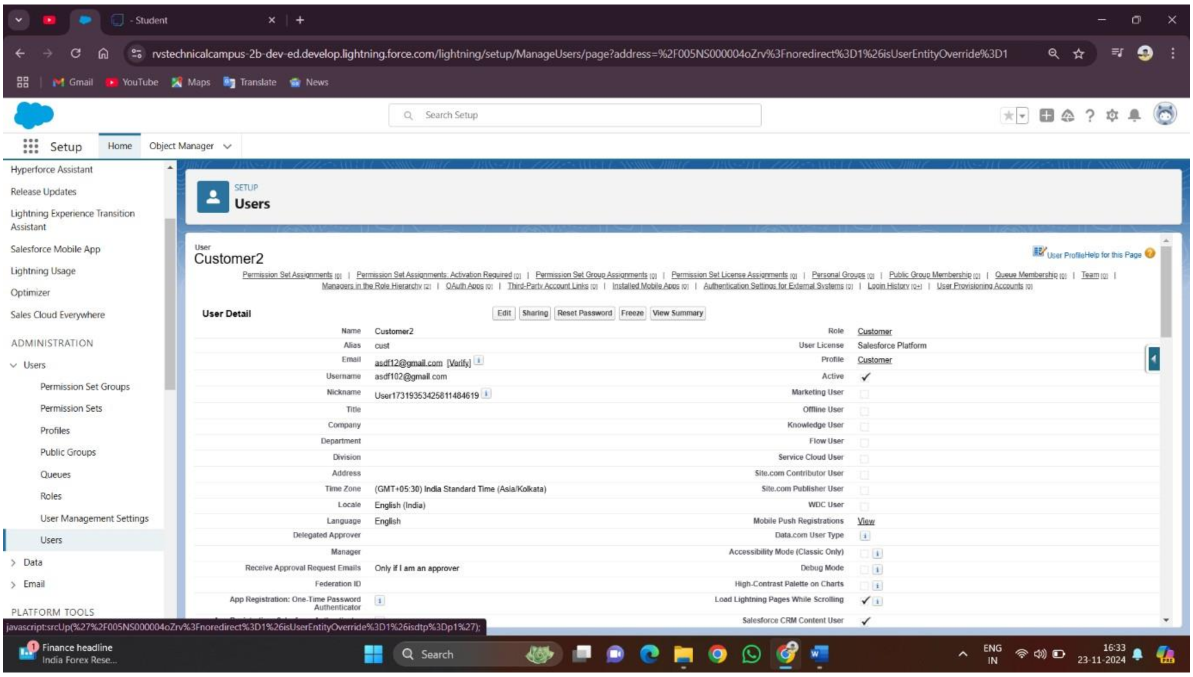
User
Customer

User Detail

Name	Customer	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	asdf12@gmail.com [Verify]	Profile	Customer
Username	asdf1002@gmail.com	Active	✓
Nickname	User17319349027921001382	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (India)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	☐
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐
Federation ID		High-Contrast Palette on Charts	☐
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	✓
		Salesforce CRM Content User	✓

User:4

In setup navigate to Administration > Users > New User, fill in the Last Name as “Customer 2”, set the Role to “Customer”, select the License as “Salesforce Platform”, choose the Profile as “Customer”, ensure the “Verified” check box ischecked, and save.



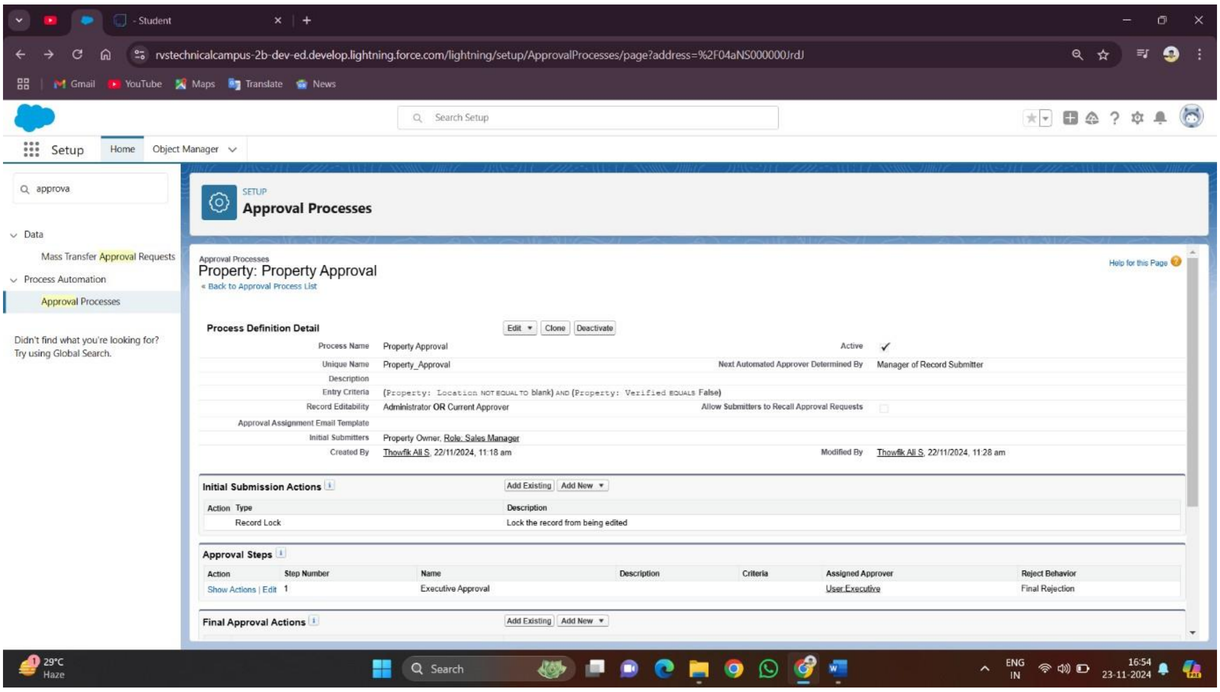
User
Customer2

User Detail

Name	Customer2	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	asdf12@gmail.com [Verify]	Profile	Customer
Username	asdf102@gmail.com	Active	✓
Nickname	User17319353425811484619	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (India)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	☐
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐
Federation ID		High-Contrast Palette on Charts	☐
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	✓
		Salesforce CRM Content User	✓

Task 9 : Create an Approval Process for Property Object.

In Setup navigate to Process Automation > Approval Process, create a “PropertyApproval” process with criteria “Location is not equal to blank” and “Verified false”, set the next automated approver to “Manager”, enable record editability for administrators or current approvers, display Property, Owner, Location, and Type on the approval page layout, set initial submitters as Property Owner and Sales Manager, Save, add an approval step “Executive Approval” for all recordswith the approver “Sales Executive”, save, add a field update “Verified Property” to set the Verified checkbox to False.



Approval Processes

Property: Property Approval

« Back to Approval Process List

Process Definition Detail

Process Name: Property Approval — Active: ✓

Unique Name: Property_Approval — Next Automated Approver Determined By: Manager of Record Submitter

Description:

Entry Criteria: (Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS False)

Record Editability: Administrator OR Current Approver — Allow Submitters to Recall Approval Requests: ☐

Approval Assignment Email Template:

Initial Submitters: Property Owner, Role: Sales Manager

Created By: Thowfik Ali S, 22/11/2024, 11:18 am — Modified By: Thowfik Ali S, 22/11/2024, 11:28 am

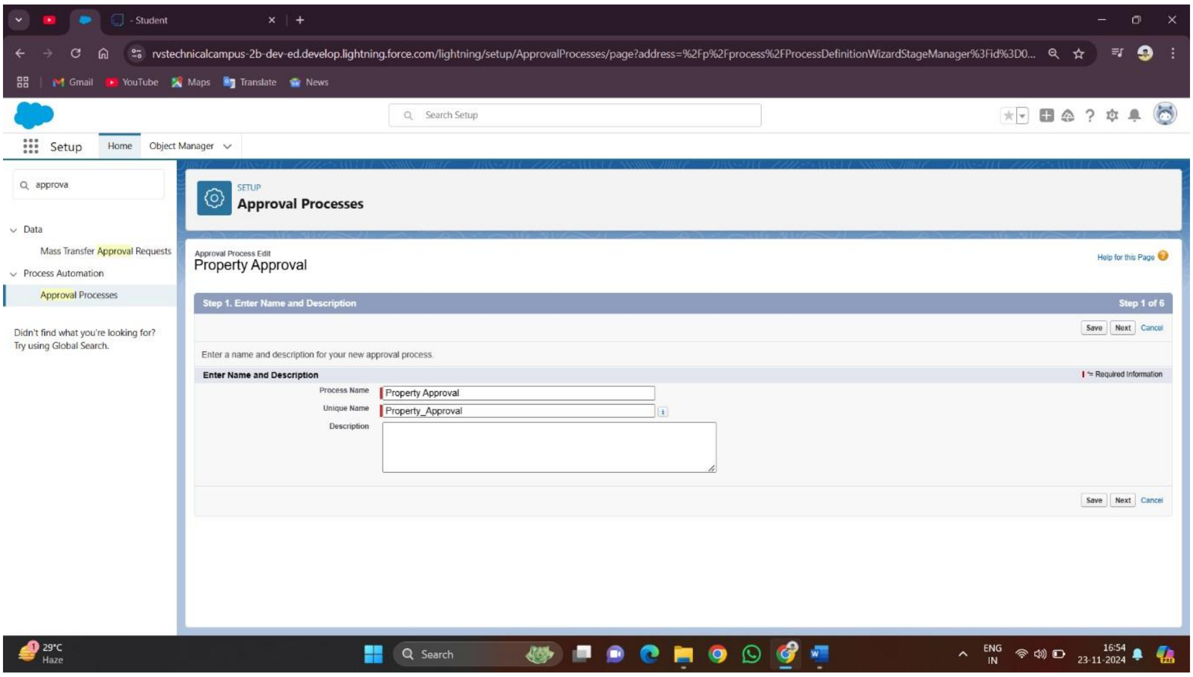
Initial Submission Actions

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions | Edit	1	Executive Approval			User: Executive	Final Rejection

Final Approval Actions



Approval Process Edit

Property Approval

Step 1. Enter Name and Description — Step 1 of 6

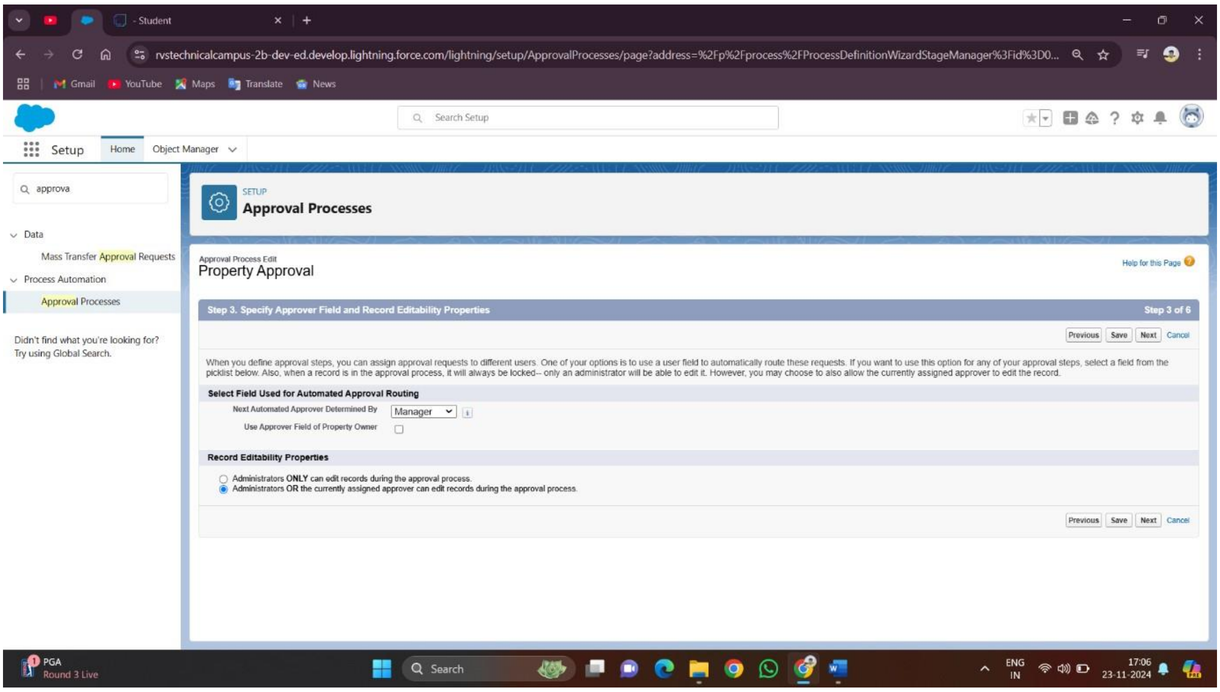
Enter a name and description for your new approval process.

Enter Name and Description — | = Required Information

Process Name: Property Approval

Unique Name: Property_Approval

Description:



Approval Processes

Approval Process Edit

Property Approval

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

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

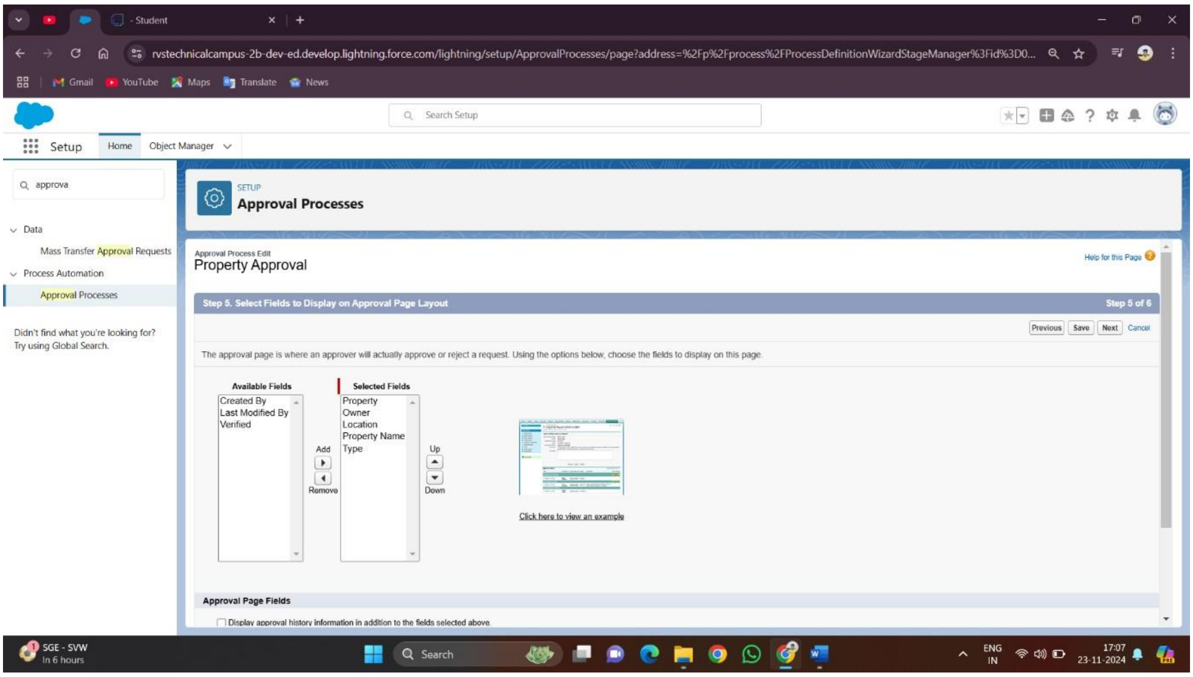
Next Automated Approver Determined By: Manager

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.



Approval Processes

Approval Process Edit

Property Approval

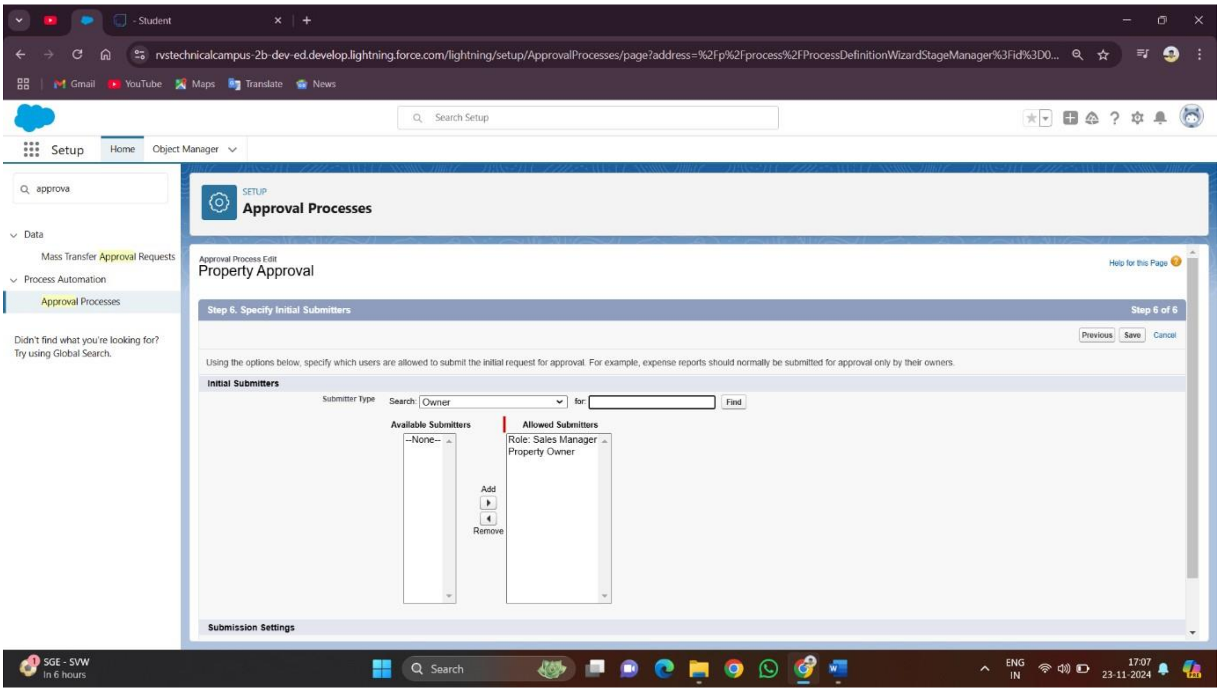
Step 5. Select Fields to Display on Approval Page Layout Step 5 of 6

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 Last Modified By Verified	Property Owner Location Property Name Type

Approval Page Fields

☐ Display approval history information in addition to the fields selected above.



Approval Process Edit

Property Approval

Step 6. Specify Initial Submitters Step 6 of 6

Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.

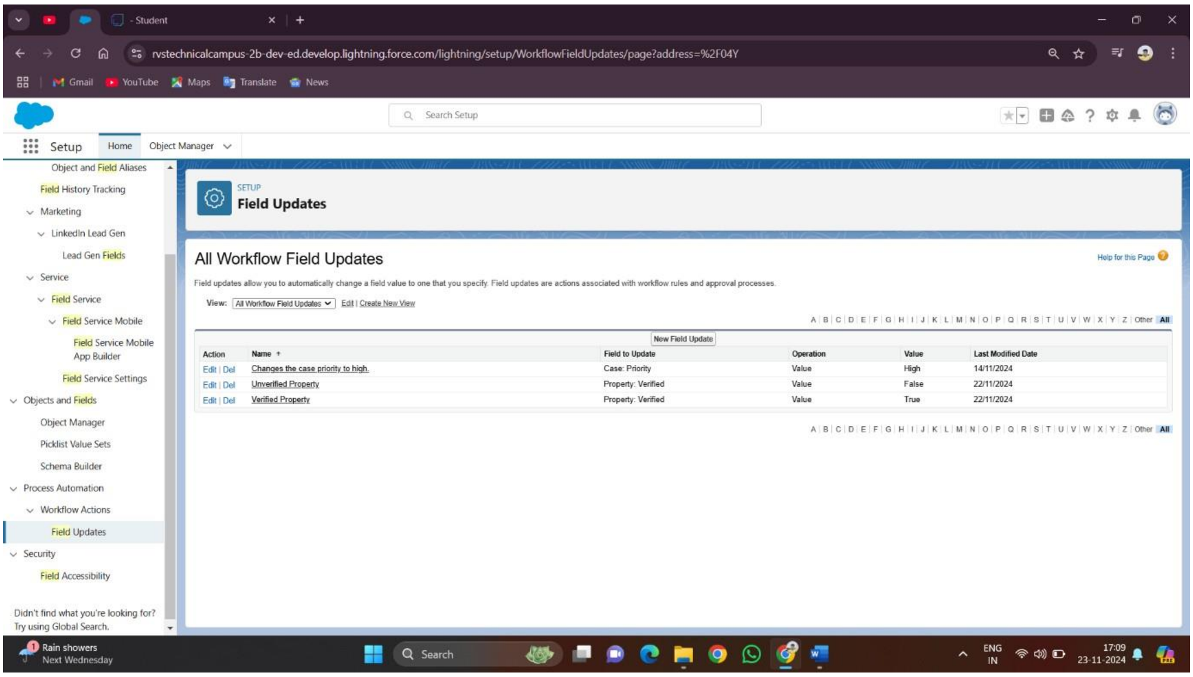
Initial Submitters

Submitter Type Search: Owner for:

Available Submitters: --None--

Allowed Submitters: Role: Sales Manager, Property Owner

Submission Settings



All Workflow Field Updates

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View: All Workflow Field Updates

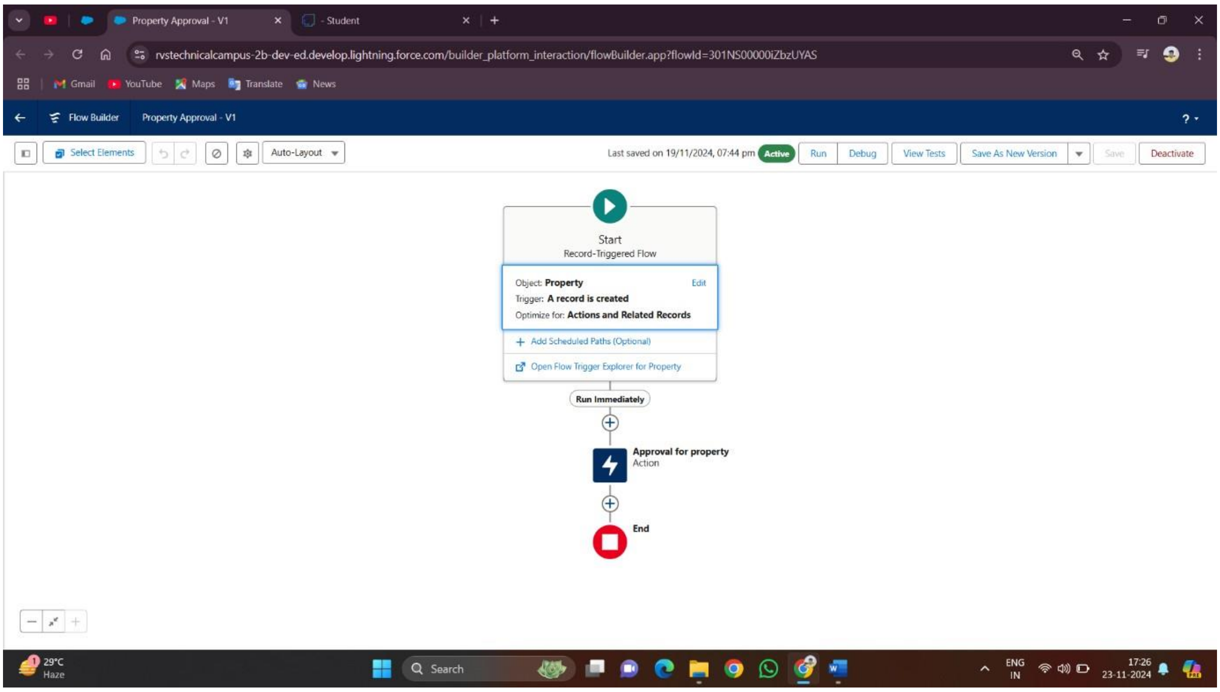
Action	Name	Field to Update	Operation	Value	Last Modified Date
Edit | Del	Changes the case priority to high.	Case: Priority	Value	High	14/11/2024
Edit | Del	Unverified Property	Property: Verified	Value	False	22/11/2024
Edit | Del	Verified Property	Property: Verified	Value	True	22/11/2024

Task 10 : Create a Record trigger flow to submit the ApprovalProcess Automatically.

A flow that can submit the records directly for approval.

Activity : 1

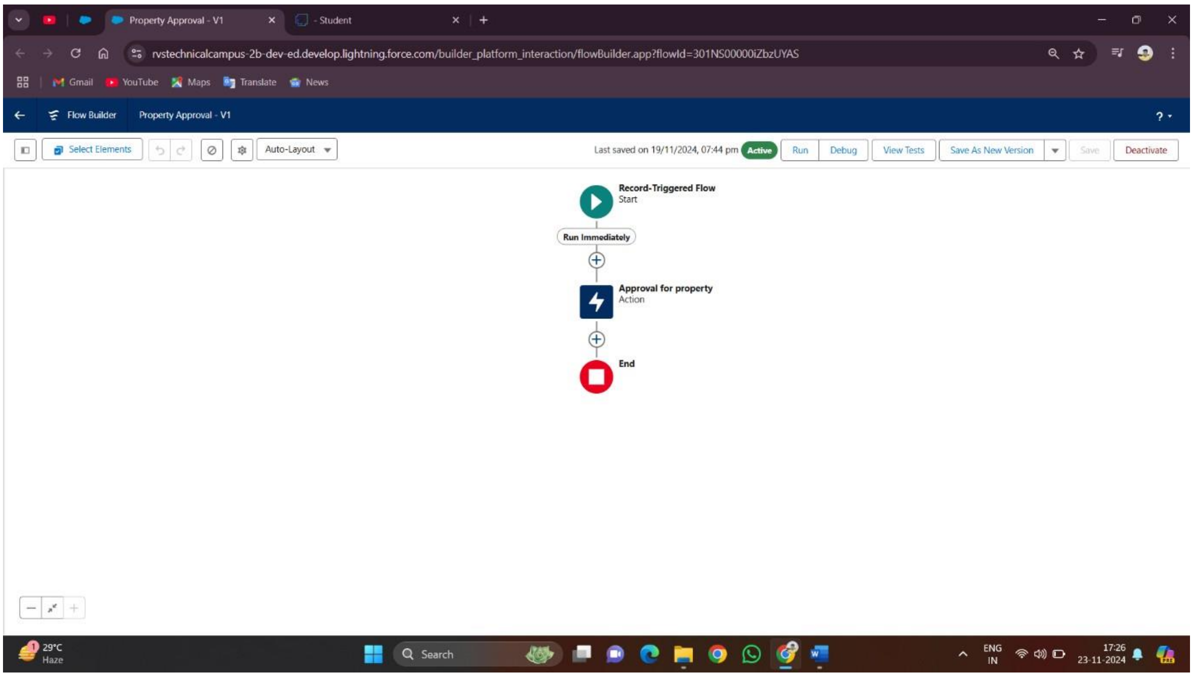
In Setup search for Flows, click on New select “Record Trigger Flow”, choose the Property object set the trigger to “A record is created”, add an action “Submit for Approval” with the lable “Approval for property’ and Record ID as {!$Record.Id}, save the flow with the lable “Property Approval”, and activate.



Object: Property

Trigger: A record is created

Optimize for: Actions and Related Records

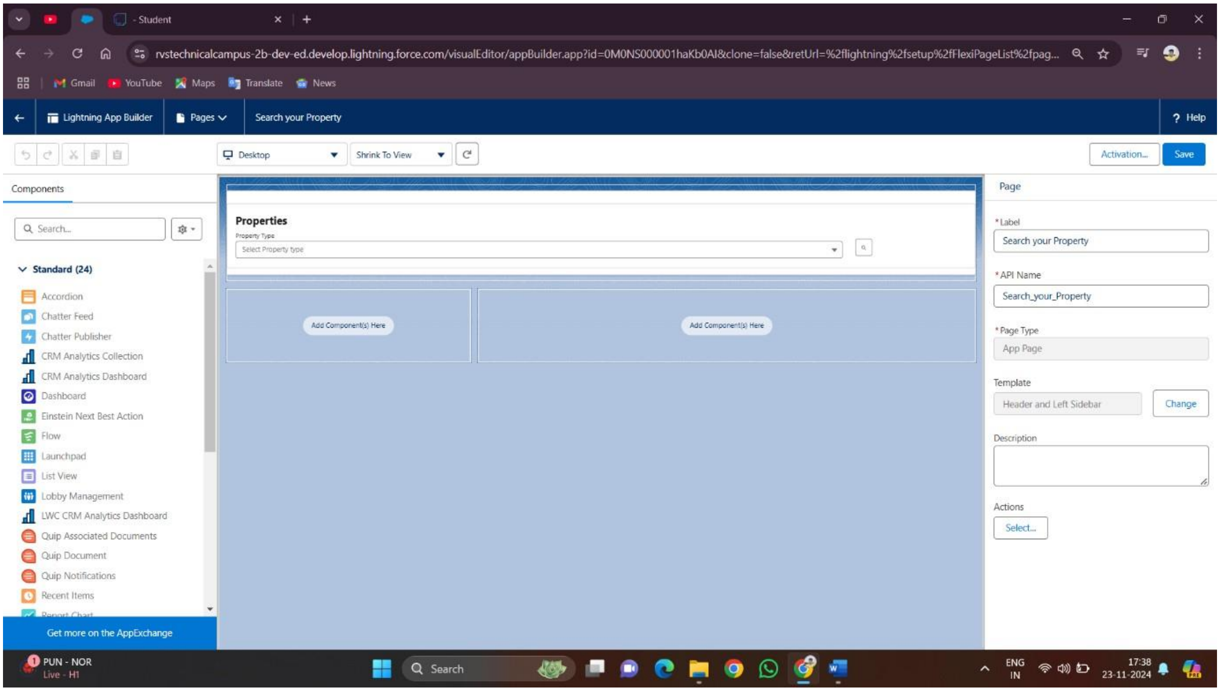


Task 11 : Create an App Page.

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

Activity :1

In Setup navigate to Lightning App Builder, create a new App page with the lable “Search your Property”, choose “Header and Left Sidebar” layout, saveand activate the page, select “Activate for all user” from page settings, and inLightning Experience, add the page to “Property Details”, then save.



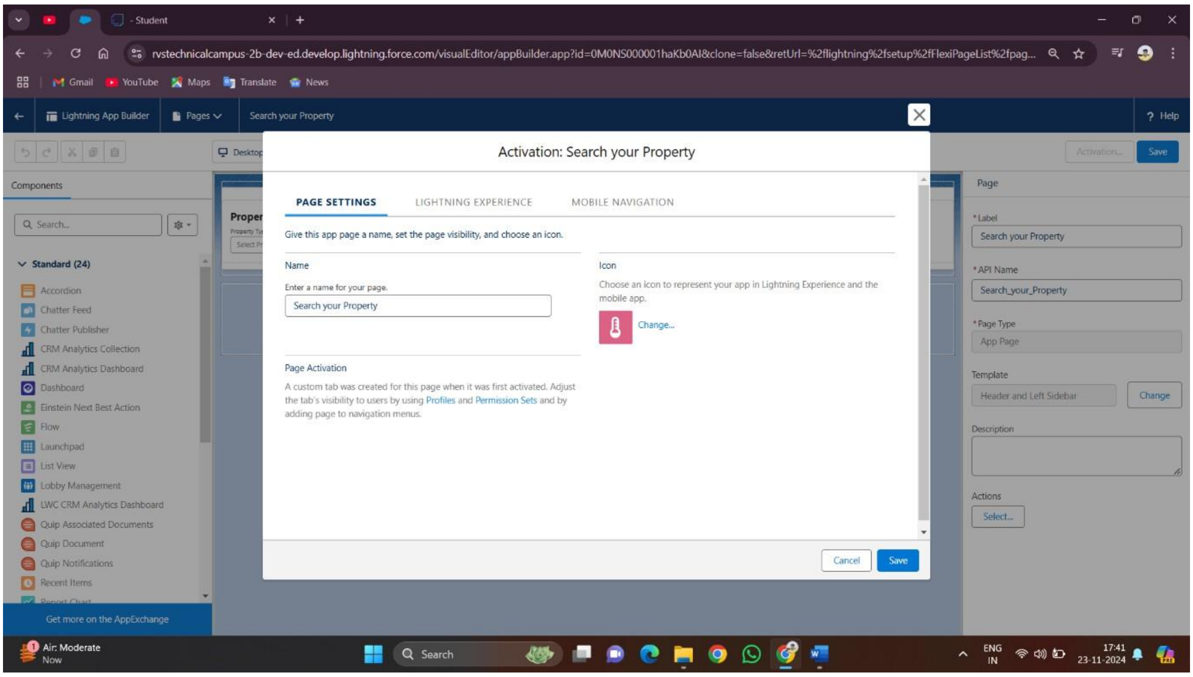
Page

*Label: Search your Property

*API Name: Search_your_Property

*Page Type: App Page

Template: Header and Left Sidebar



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.

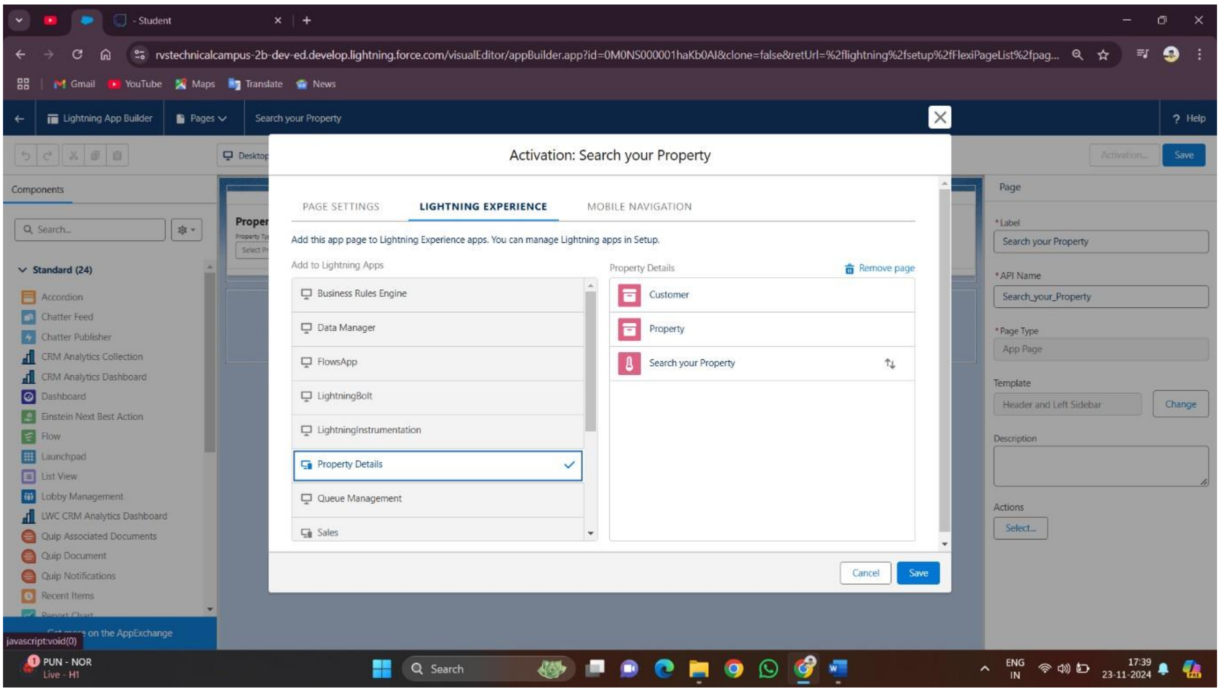
Search your Property

Icon

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

Page Activation

A custom tab was created for this page when it was first activated. Adjust the tab's visibility to users by using Profiles and Permission Sets and by adding page to navigation menus.



Activation: Search your Property

Add this app page to Lightning Experience apps. You can manage Lightning apps in Setup.

Add to Lightning Apps:
- Business Rules Engine
- Data Manager
- FlowsApp
- LightningBolt
- LightningInstrumentation
- Property Details ✓
- Queue Management
- Sales

Property Details:
- Customer
- Property
- Search your Property

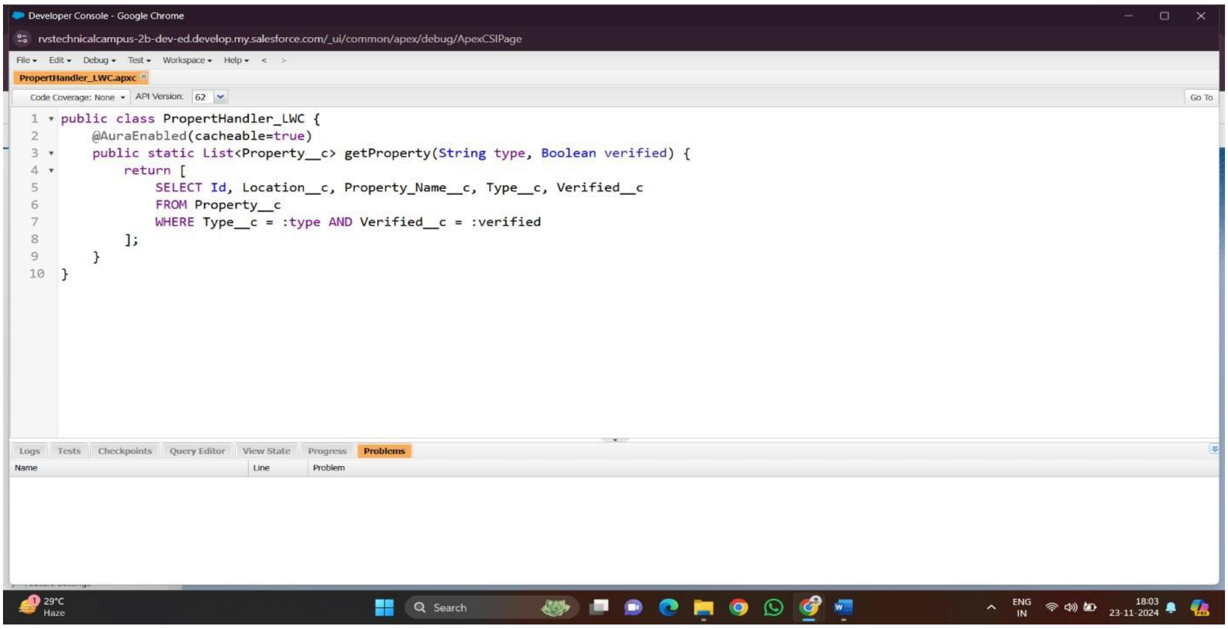
Label: Search your Property
API Name: Search_your_Property
Page Type: App Page
Template: Header and Left Sidebar

Task 12 : Create a LWC Component.

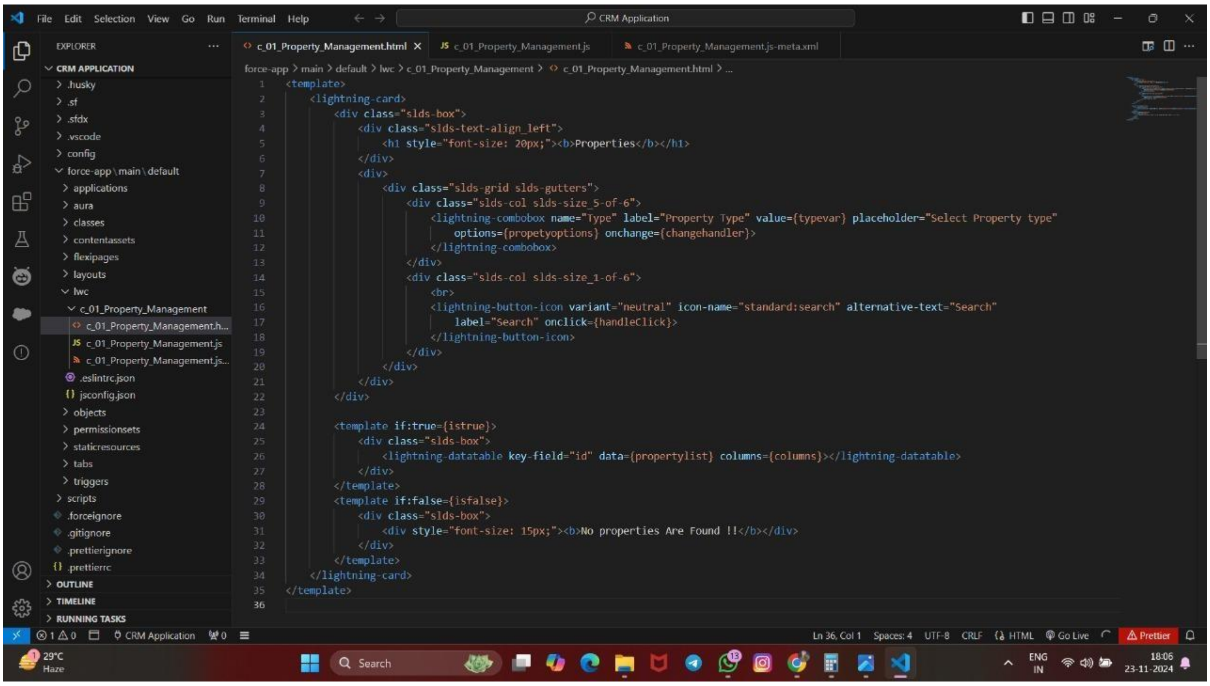
Create an LWC Component for the customers so that only verified customers can access the verified properties and non Verified customers can access nonverified properties, and deploy it on “Search your Property Page”.

Activity : 1

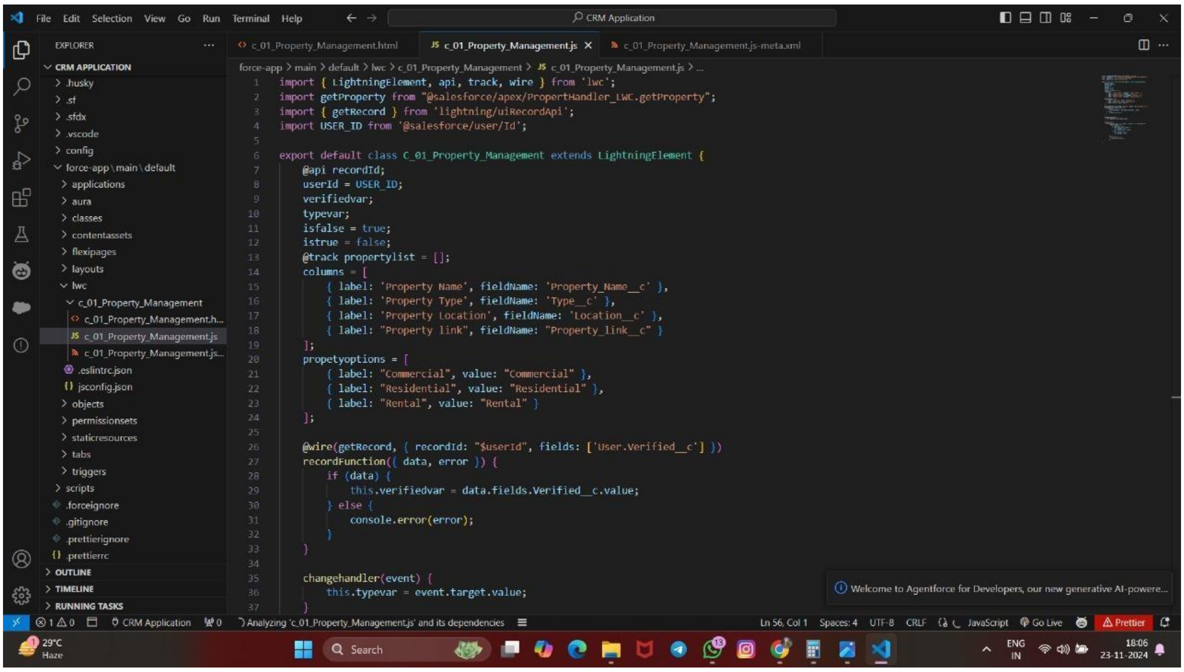
Create an Apex class named “PropertyHandler_LWC” and make it Auraenabled, then in VScode, authorize your org, create a Lightning Web Component, write the provided code.



```
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
        ];
    }
}
```



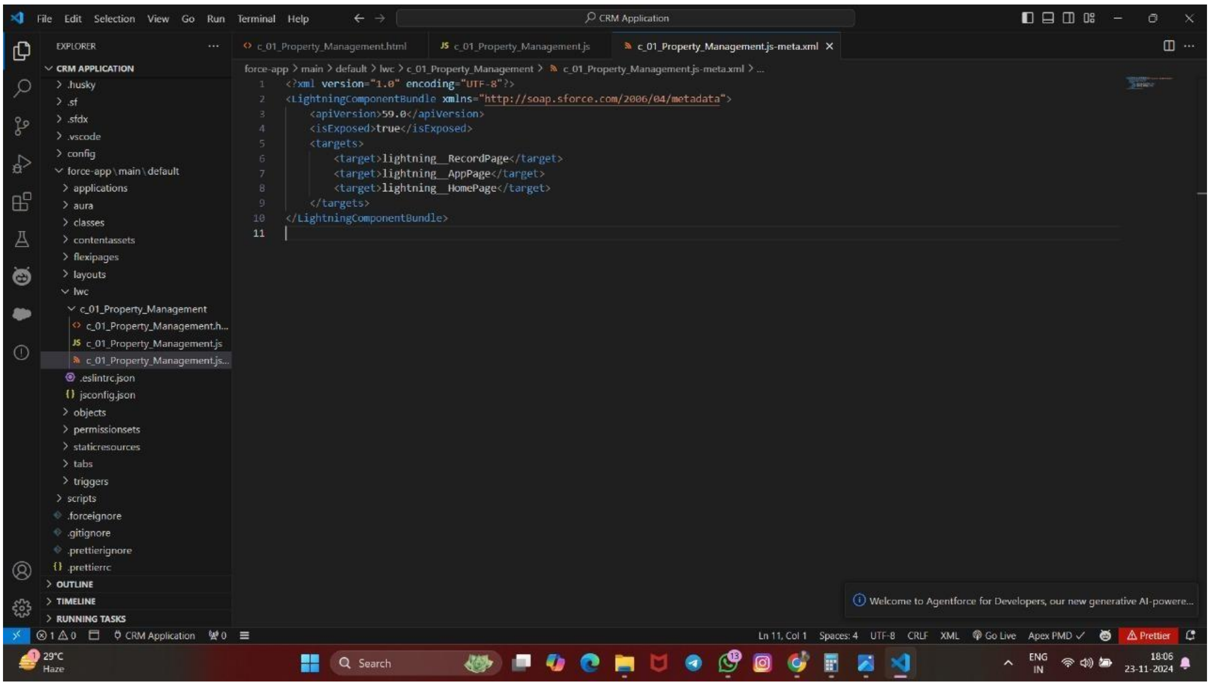
```html
<template>
    <lightning-card>
        <div class="slds-box">
            <div class="slds-text-align_left">
                <h1 style="font-size: 20px;"><b>Properties</b></h1>
            </div>
            <div>
                <div class="slds-grid slds-gutters">
                    <div 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>
```



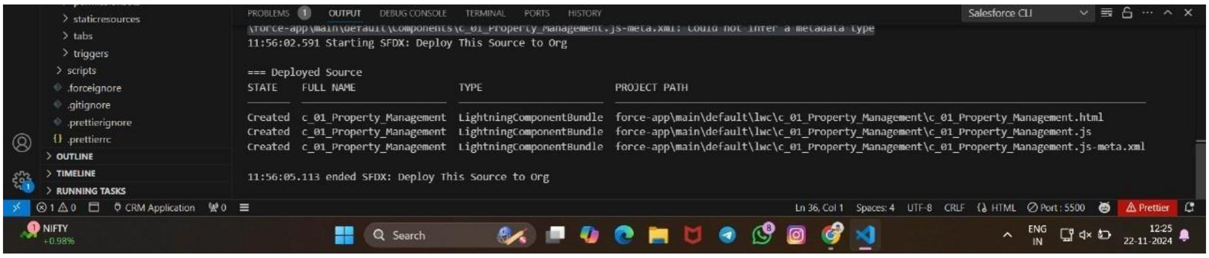
```javascript
import { LightningElement, api, track, wire } from 'lwc';
import getProperty from "@salesforce/apex/PropertHandler_LWC.getProperty";
import { getRecord } from 'lightning/uiRecordApi';
import USER_ID from '@salesforce/user/Id';

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) {
            this.verifiedvar = data.fields.Verified__c.value;
        } else {
            console.error(error);
        }
    }

    changehandler(event) {
        this.typevar = event.target.value;
    }
```

Welcome to Agentforce for Developers, our new generative AI-powere...

Analyzing 'c_01_Property_Management.js' and its dependencies



```xml
<?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>
```



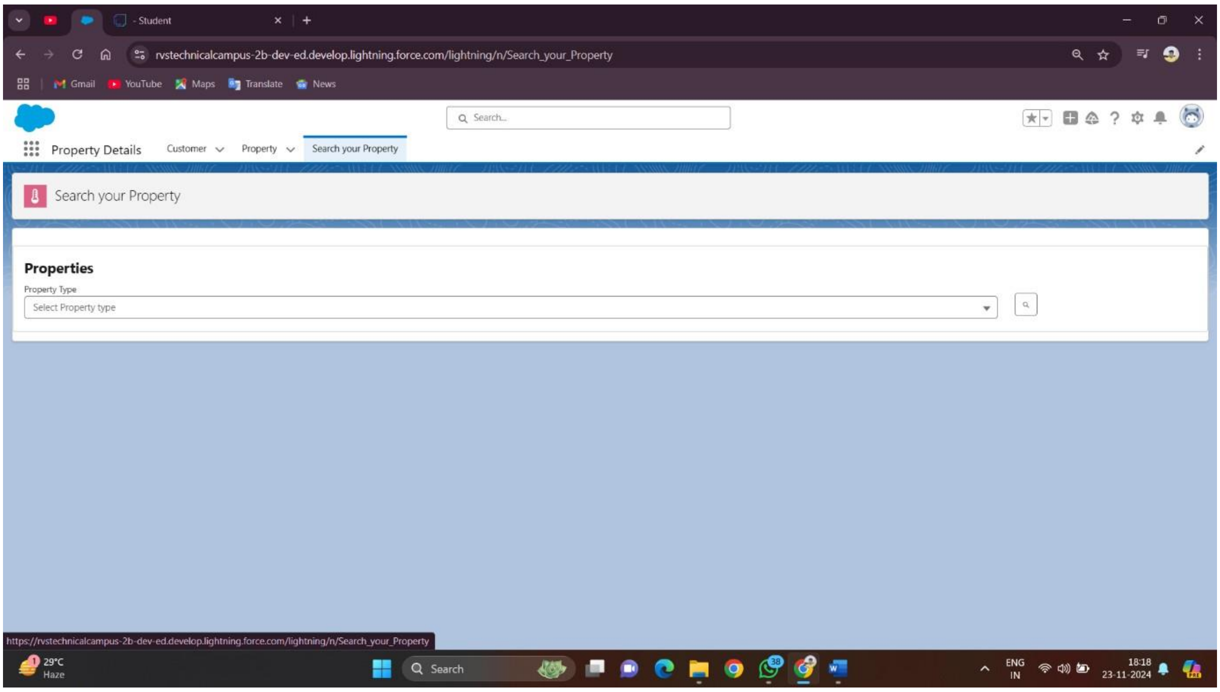
```
\force-app\main\default\components\c_01_Property_Management.js-meta.xml: Could not infer a metadata type
11:56:02.591 Starting SFDX: Deploy This Source to Org

=== Deployed Source
STATE    FULL NAME                  TYPE                      PROJECT PATH
───────  ─────────────────────────  ────────────────────────  ──────────────────────────────────────────────────────────────────────────────
Created  c_01_Property_Management   LightningComponentBundle  force-app\main\default\lwc\c_01_Property_Management\c_01_Property_Management.html
Created  c_01_Property_Management   LightningComponentBundle  force-app\main\default\lwc\c_01_Property_Management\c_01_Property_Management.js
Created  c_01_Property_Management   LightningComponentBundle  force-app\main\default\lwc\c_01_Property_Management\c_01_Property_Management.js-meta.xml

11:56:05.113 ended SFDX: Deploy This Source to Org
```

Task 13 : Drag this Component to your App Page.

Adding the Component to your Page .

Activity : 1

In Setup, go to App Launcher , search for Property Details, click the gear icon toEdit Page, drag the component to your App Page, and save the page.

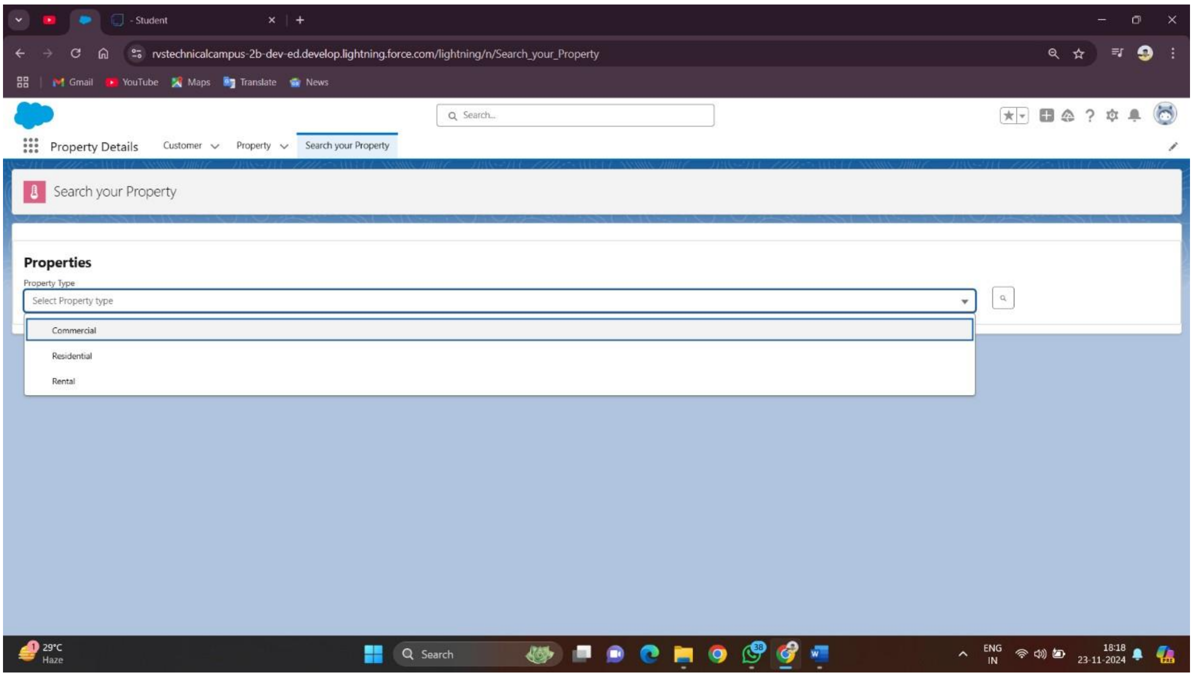


rvstechnicalcampus-2b-dev-ed.develop.lightning.force.com/lightning/n/Search_your_Property

Search your Property

Properties

Property Type: Select Property type



rvstechnicalcampus-2b-dev-ed.develop.lightning.force.com/lightning/n/Search_your_Property

Search your Property

Properties

Property Type: Select Property type

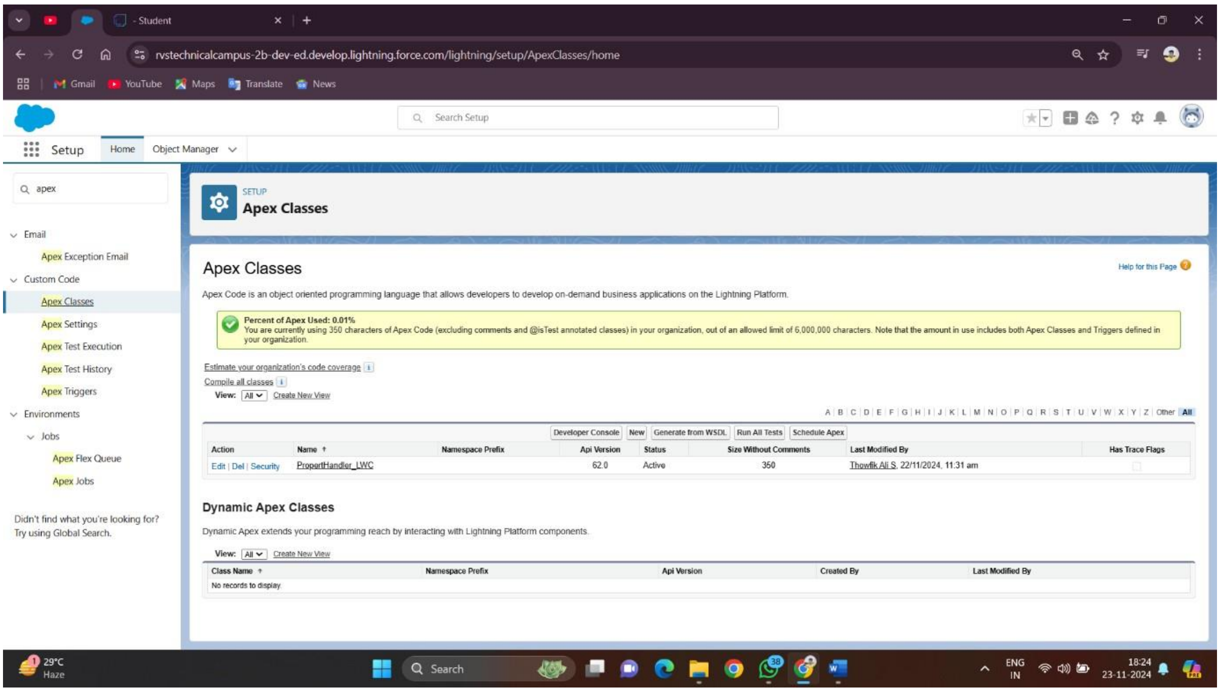
- Commercial
- Residential
- Rental

Task 14 : Give Access of Apex Classes to Profiles.

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

Activity : 1

In Setup, search for Apex Classes, click on “Security” next to “PropertyHandler_LWC”, add the “Manager” and “Customer” profiles, andSave.



Didn't find what you're looking for? Try using Global Search.

Apex Classes

Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Lightning Platform.

Percent of Apex Used: 0.01%
You are currently using 350 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Estimate your organization's code coverage
Compile all classes
View: All Create New View

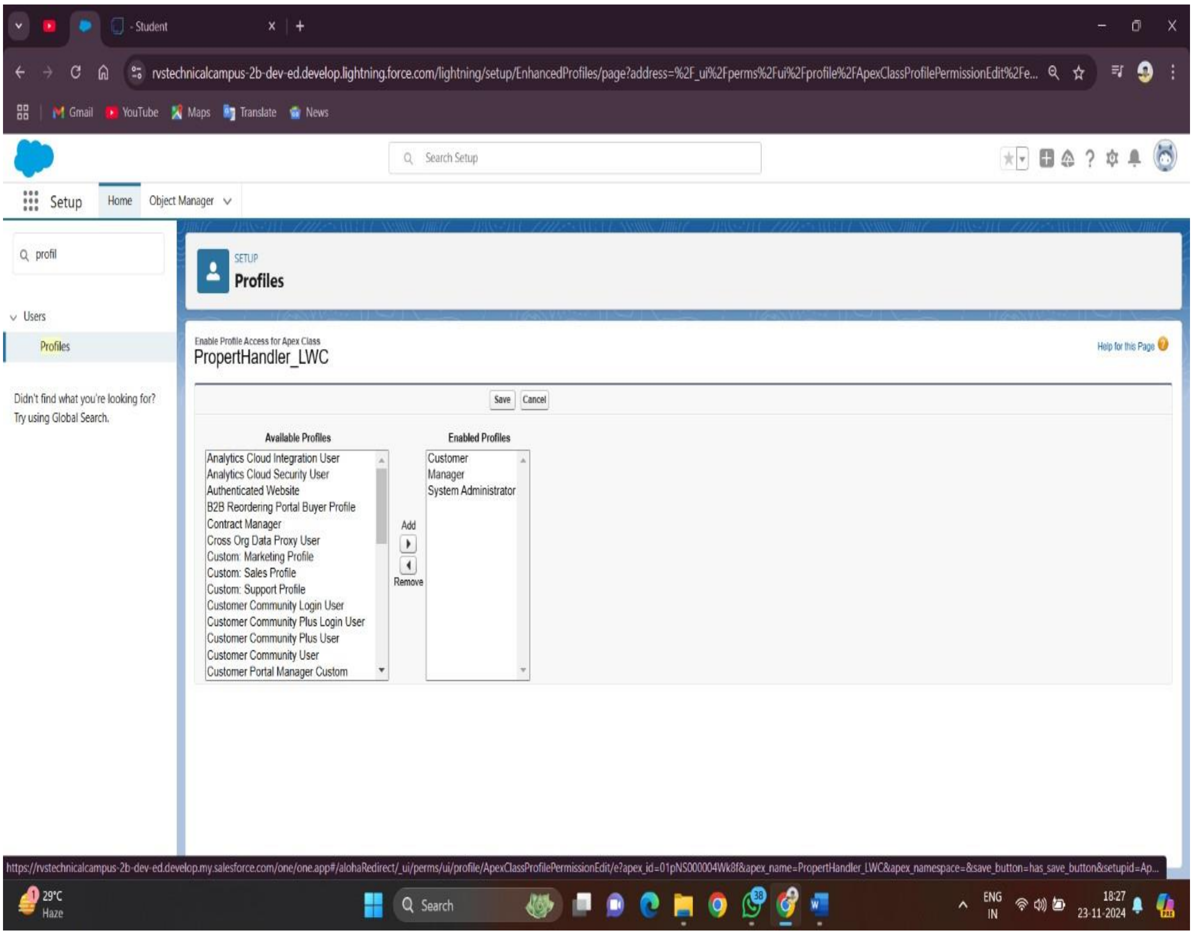
Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit | Del | Security	PropertHandler_LWC		62.0	Active	350	Thowfik Ali S, 22/11/2024, 11:31 am	☐

Dynamic Apex Classes

Dynamic Apex extends your programming reach by interacting with Lightning Platform components.

View: All Create New View

Class Name	Namespace Prefix	Api Version	Created By	Last Modified By
No records to display.				



Didn't find what you're looking for? Try using Global Search.

Enable Profile Access for Apex Class
PropertHandler_LWC

Available Profiles	Enabled Profiles
Analytics Cloud Integration User Analytics Cloud Security User Authenticated Website B2B Reordering Portal Buyer Profile Contract Manager Cross Org Data Proxy User Custom: Marketing Profile Custom: Sales Profile Custom: Support Profile Customer Community Login User Customer Community Plus Login User Customer Community Plus User Customer Community User Customer Portal Manager Custom	Customer Manager System Administrator