

# Customer Relationship Management (CRM) Application to handle clients and their property related requirements

## Project Overview:

This project focuses on developing a **Customer Relationship Management (CRM) Application** for Dreams World Properties. The aim is to integrate Salesforce to streamline customer interactions and provide a comprehensive solution for managing client and property-related requirements. By leveraging Salesforce, the project enhances operational efficiency, delivers a personalized user experience, and supports growth in the real estate sector through tailored property recommendations and automated workflows.

## Objectives:

### Business Goals

- Streamline customer data management and automate record creation.
- Improve customer engagement through personalized property recommendations.
- Enhance operational efficiency by automating the user approval process and property selection.

### Specific Outcomes

- Real-time customer record creation triggered by website engagement.
- Categorization of users as **approved** or **non-approved** for tailored property selections.
- Seamless integration of website data with Salesforce for accurate and efficient processing.

## Salesforce Key Features and Concepts Utilized

- **Custom Objects:** To manage customer and property details effectively.
- **Approval Processes:** To streamline and automate user approval for tailored property recommendations.
- **Record Trigger Flows:** To automate workflows such as submission of approval processes.
- **Profiles and Roles:** For secure access control and role-based data management.

- **Lightning Web Components (LWC):** For an interactive and intuitive user interface.
- **Integration Tools:** Connecting JotForm with Salesforce to capture and sync customer data automatically.

## Detailed Steps to Solution Design

### 1. JotForm Integration:

- Create a JotForm to collect customer details and integrate it with Salesforce for automated record creation.

### 2. Object Creation:

- Develop custom objects to store and manage customer and property data.

### 3. User Categorization:

- Implement a checkbox field and a categorization logic for identifying approved and non-approved users.

### 4. Approval Process:

- Design and automate approval workflows for property recommendations.

### 5. Lightning Web Component Development:

- Build and deploy a dynamic LWC for property listings and user interactions.

### 6. Access Control:

- Configure roles and profiles for secure data access and functionality distribution.

### 7. Testing and Validation:

- Conduct **Unit Testing** for Apex classes and triggers.
- Perform **User Interface Testing** for LWCs and application workflows.

## Testing and Validation

### Testing Approach:

- **Unit Testing:** To validate the functionality of Apex classes and workflows.
- **UI Testing:** To ensure smooth user interaction and seamless integration with Salesforce.

## Key Scenarios Addressed by Salesforce in the Implementation Project

- Automating customer record creation from website interactions.
- Managing user approval processes dynamically for property recommendations.
- Providing personalized and general property suggestions based on user status.
- Securing data access with role-based and profile-based configurations

## Project Tasks:

1. Create A JotForm and Integrate It with The Org to Create a Record of Customers Automatically.



Property - Google Sheets

docs.google.com/spreadsheets/d/1bifjB6xNxRitKb6CT6NHNNujHVY9DTdXOkN2RL\_hbY/edit?gid=0#gid=0

Property

File Edit View Insert Format Data Tools Extensions Help

100% View only

	A	B	C	D	E	F	G	H	I	J	K	L
1	Property Name	Type	Location	Verified								
2	Lotus Appartmer	Residential	hyderabad	checked								
3	500000 sq.ft plot	Commercial	Amravati	uchecked								
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Customer | Salesforce

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Setup

Object Manager

Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

Customer details

API Name

Customer\_c

Custom

✓

Singular Label

Customer

Plural Label

Customer

Enable Reports

✓

Track Activities

✓

Track Field History

Deployment Status

Deployed

Help Settings

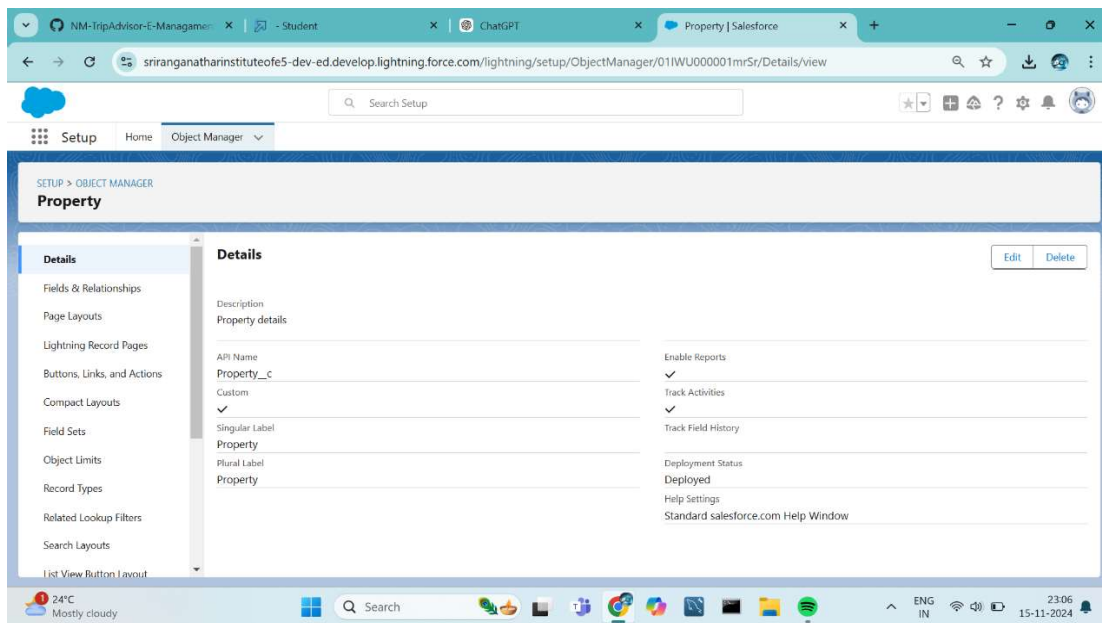
Standard salesforce.com Help Window

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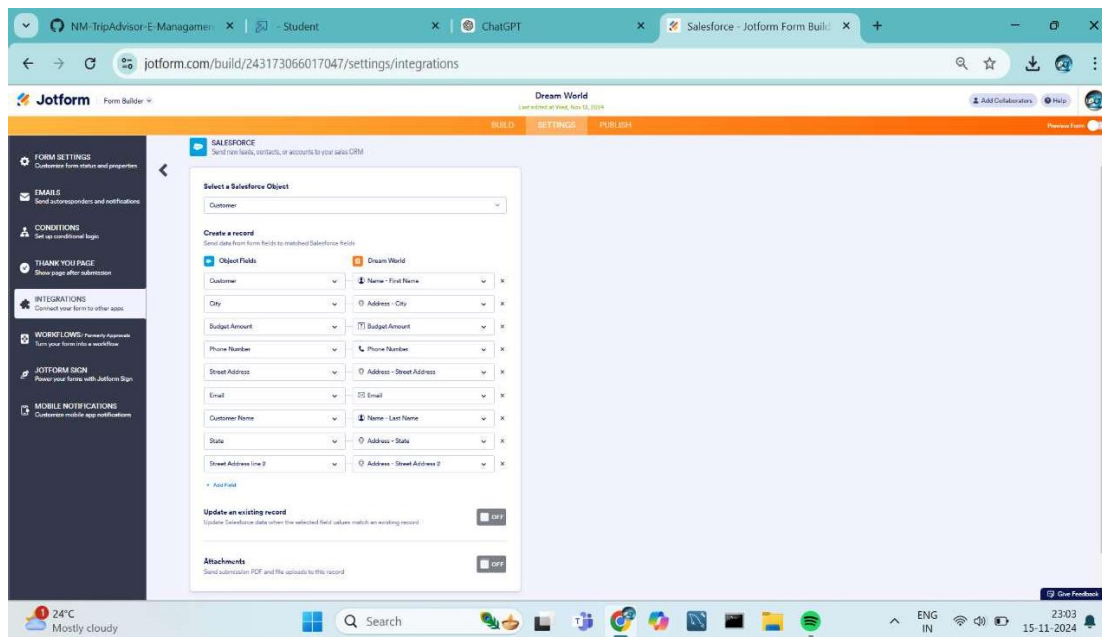
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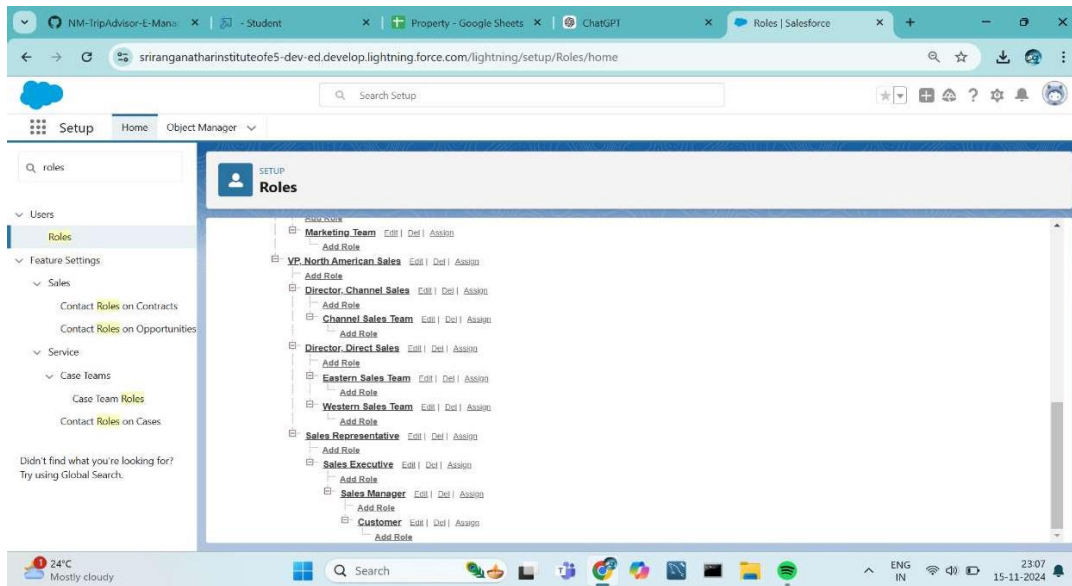
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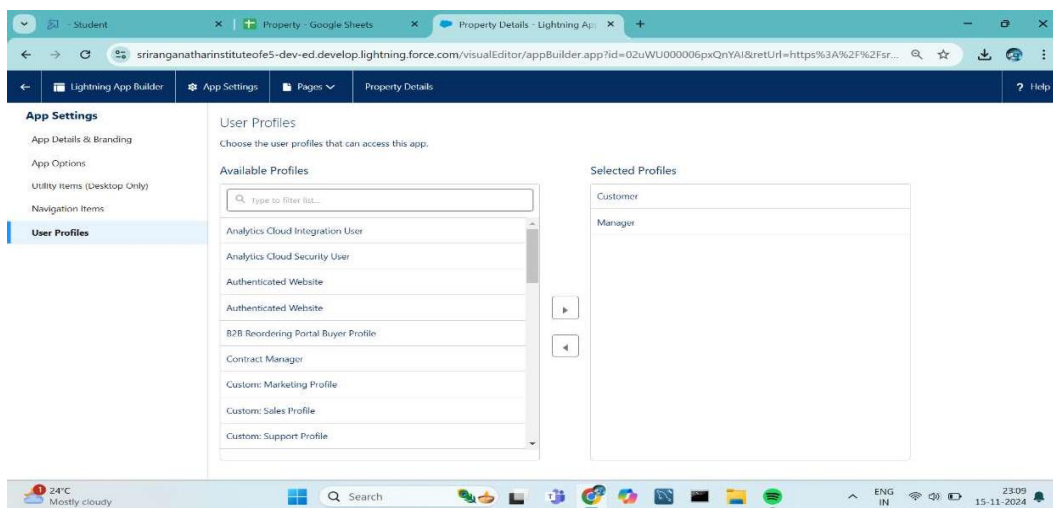
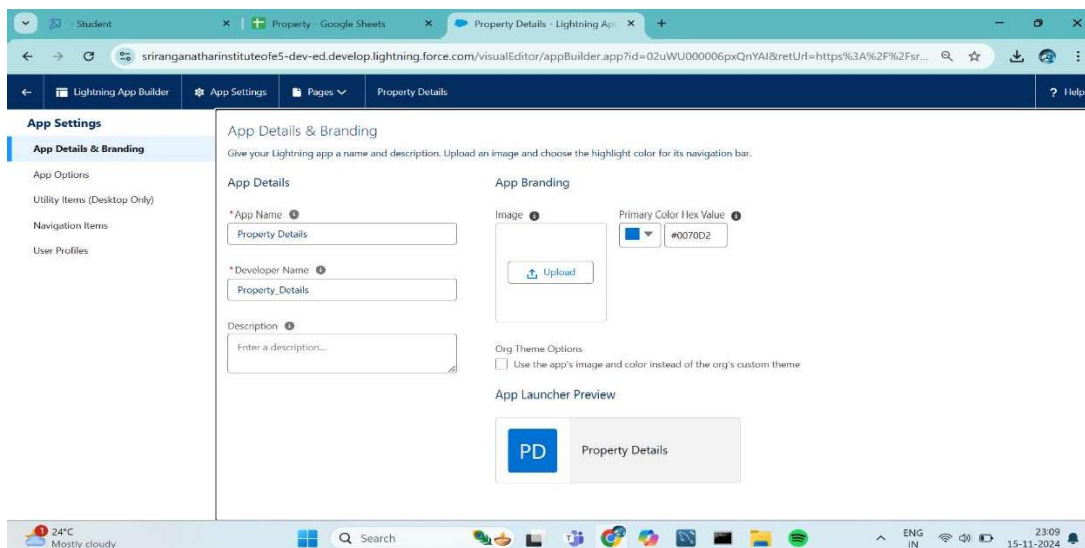
### 3. Integrate JotForm with Salesforce Platform.



### 4. Create Roles.

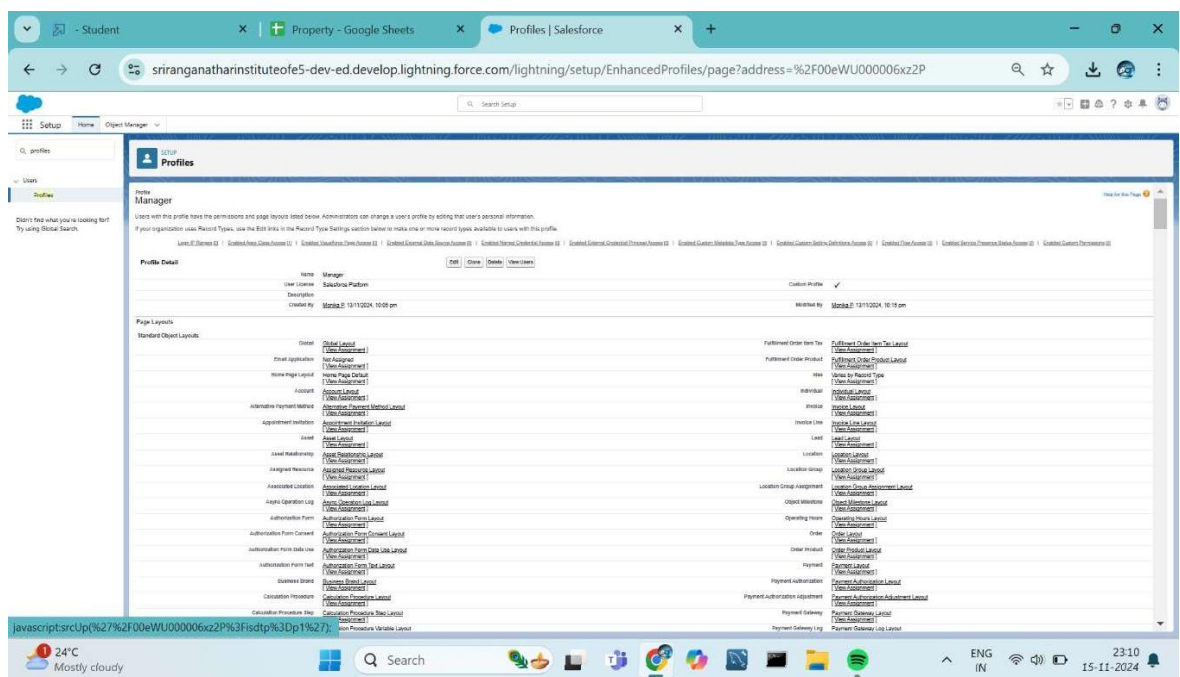
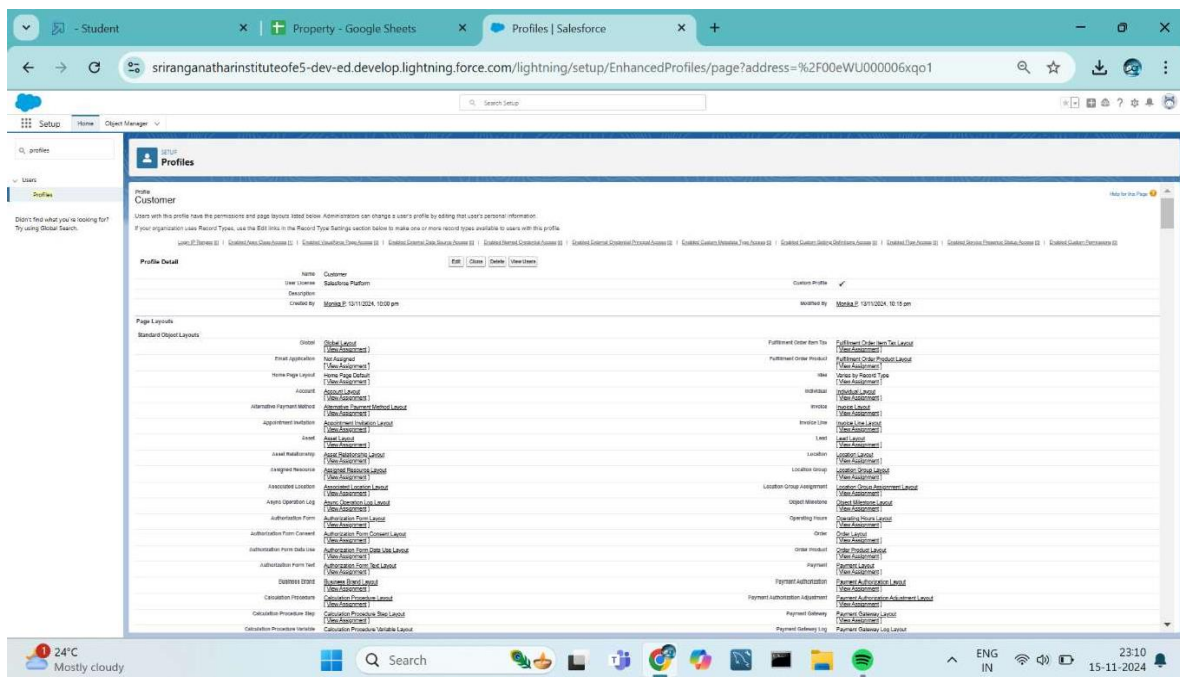


## 5. Create A Property Details App.

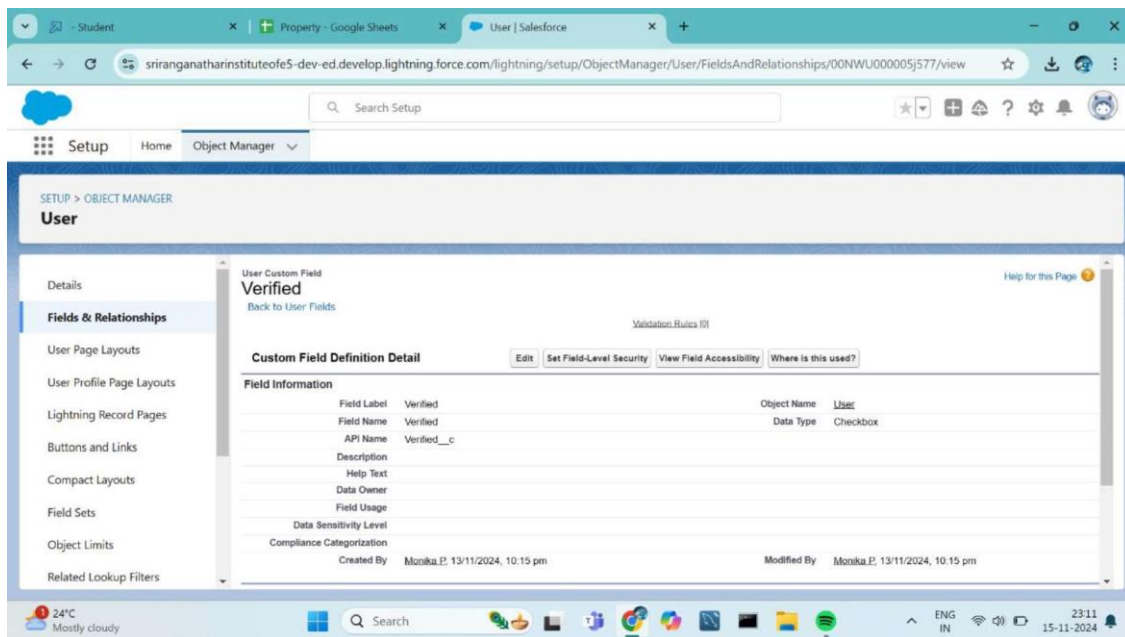




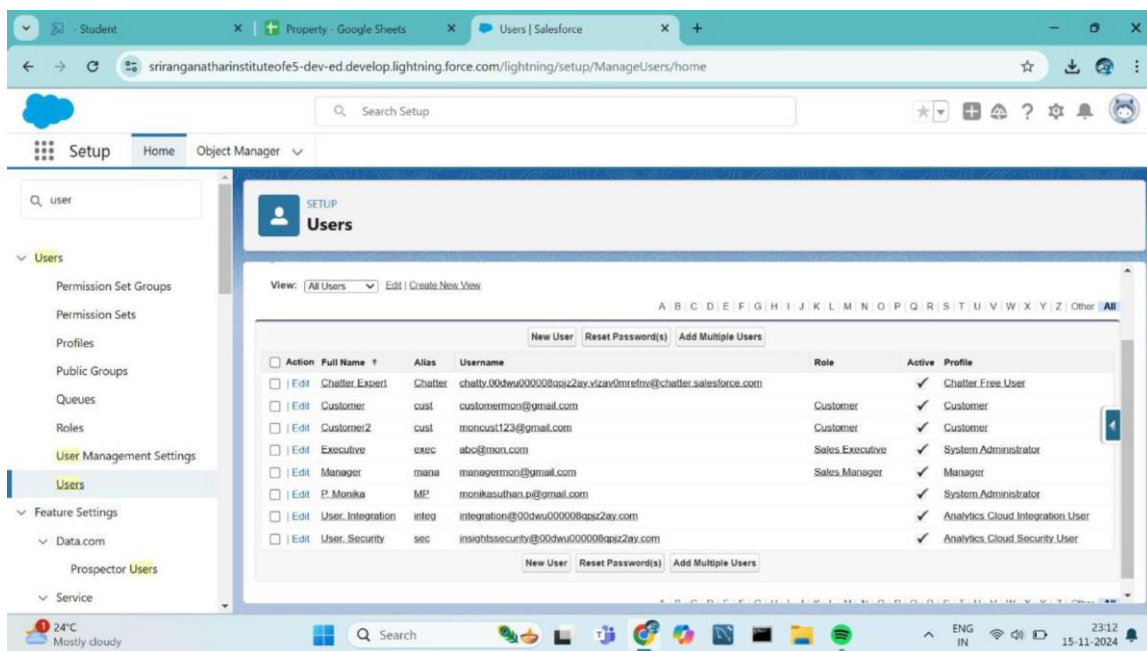
## 6. Create Profiles.



## 7. Create A Check Box Field on User.

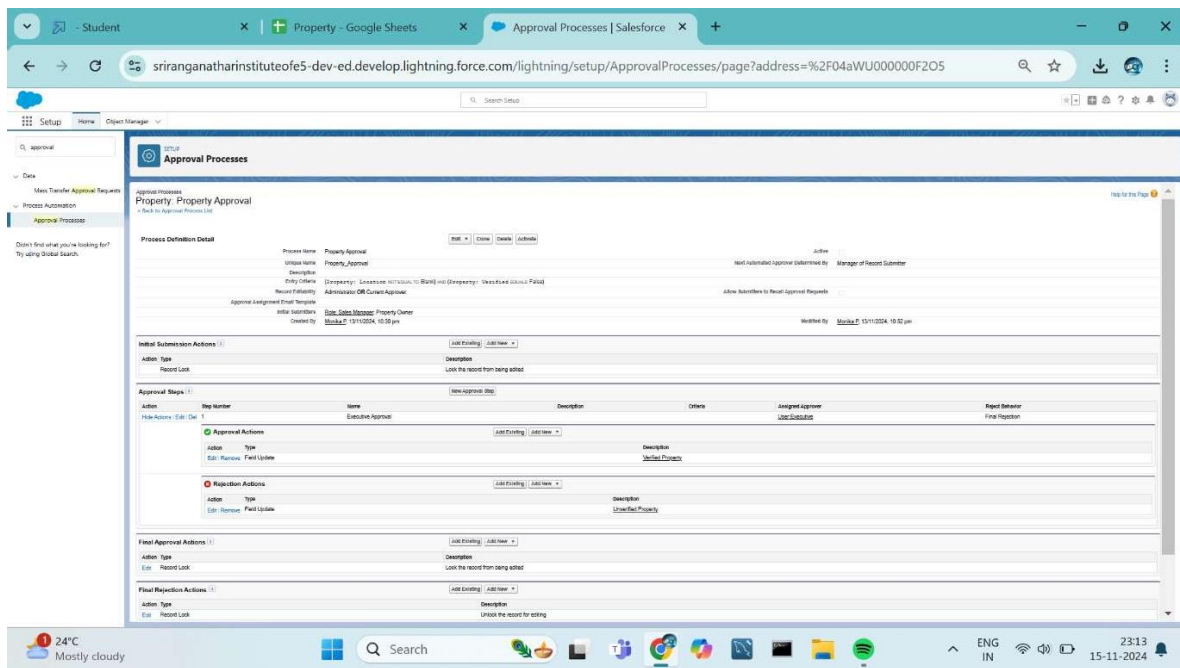


## 8. Create Users.

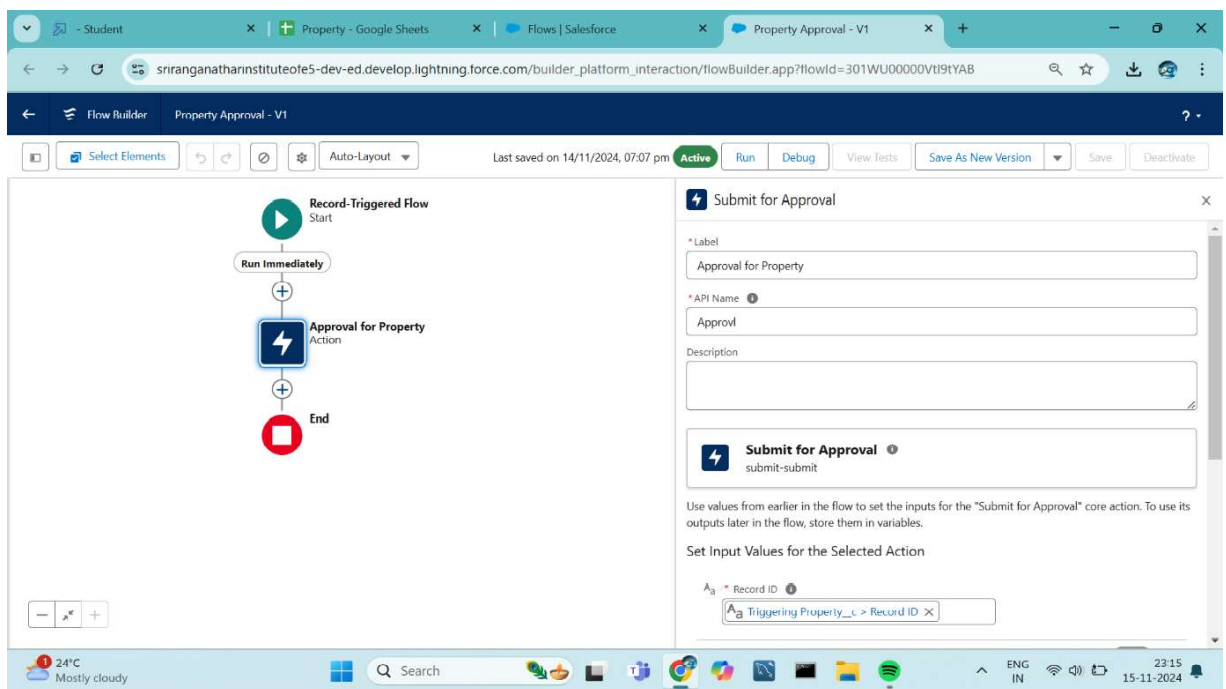


## 9. Create An Approval Process for Property Object.

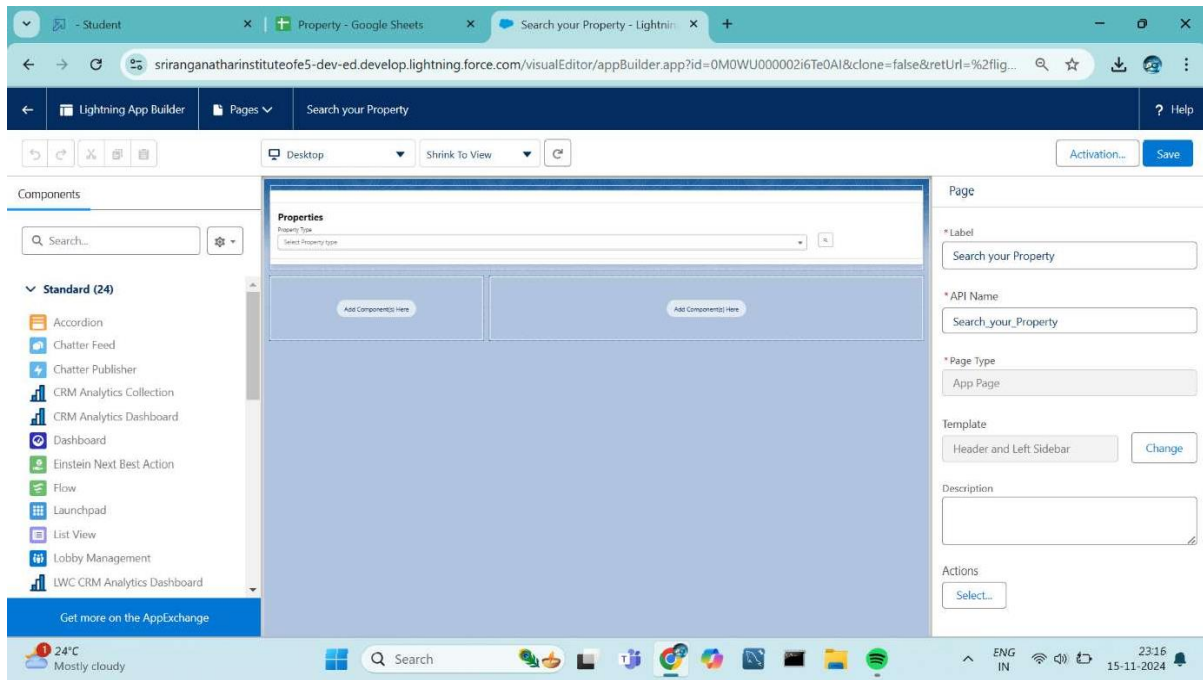




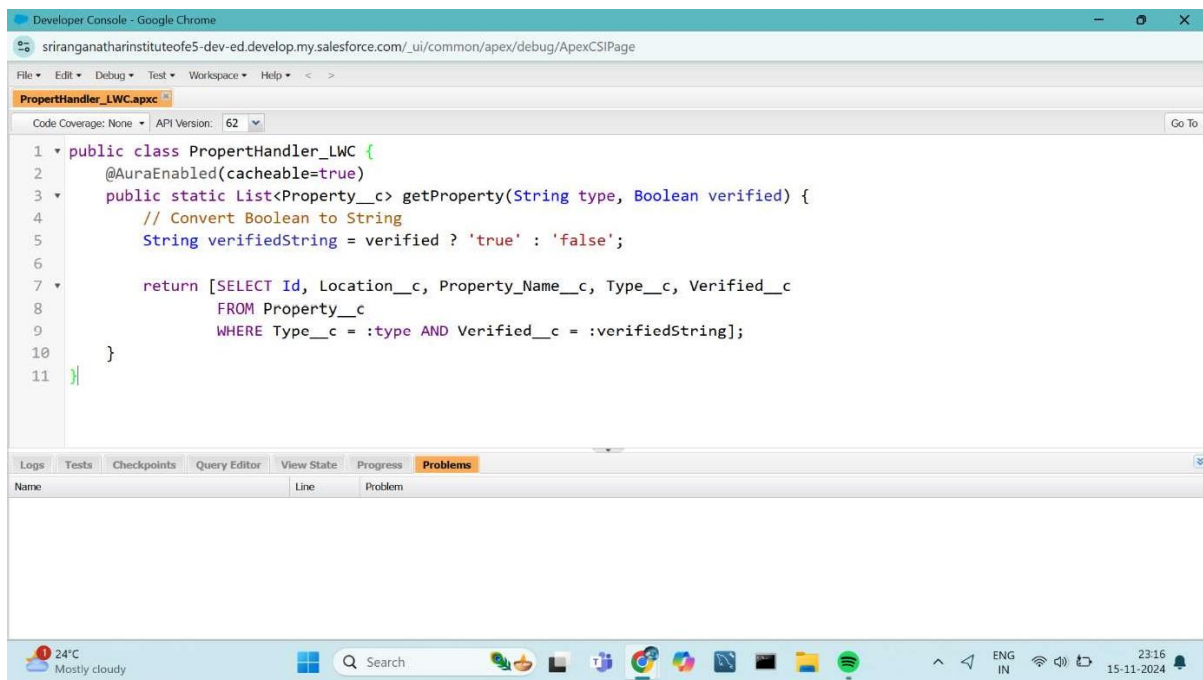
## 10. Create A Record Trigger Flow to Submit the Approval Process Automatically.

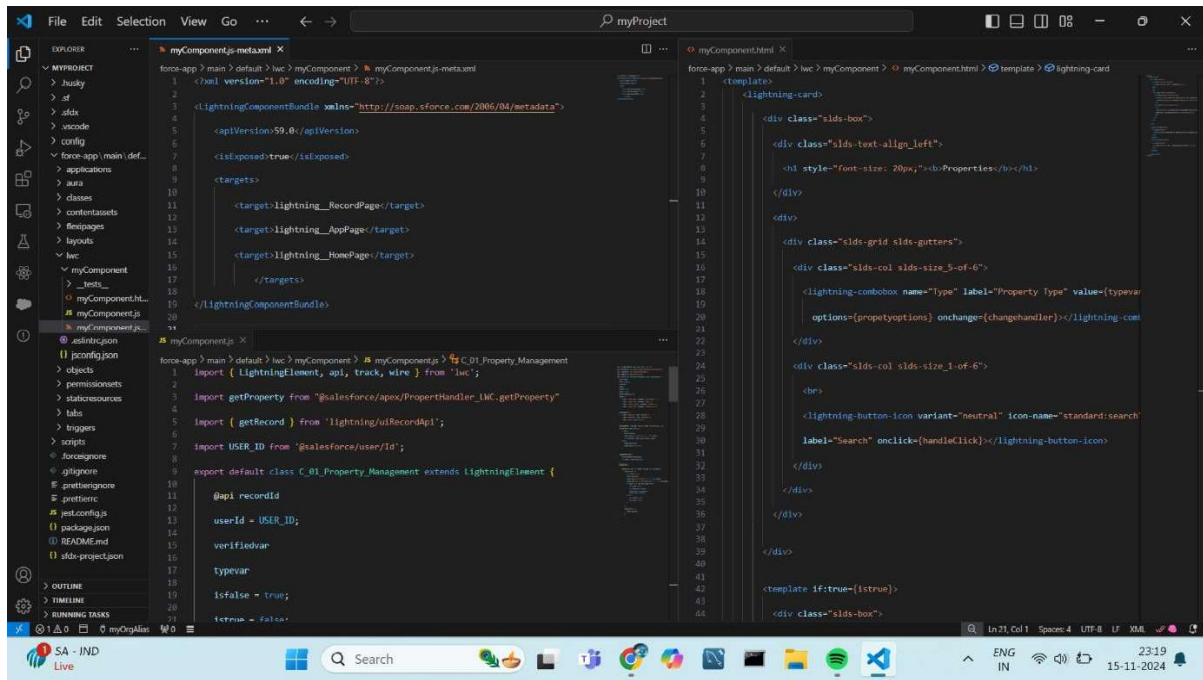


## 11. Create An App Page.

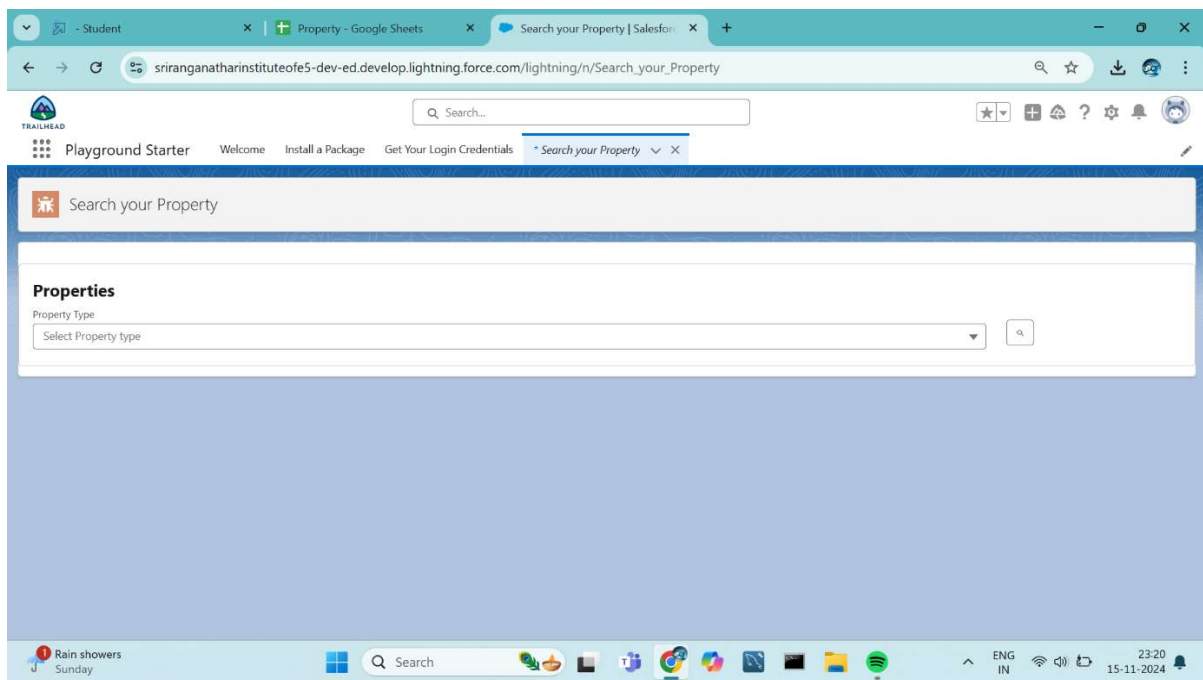


## 12.Create A LWC Component.

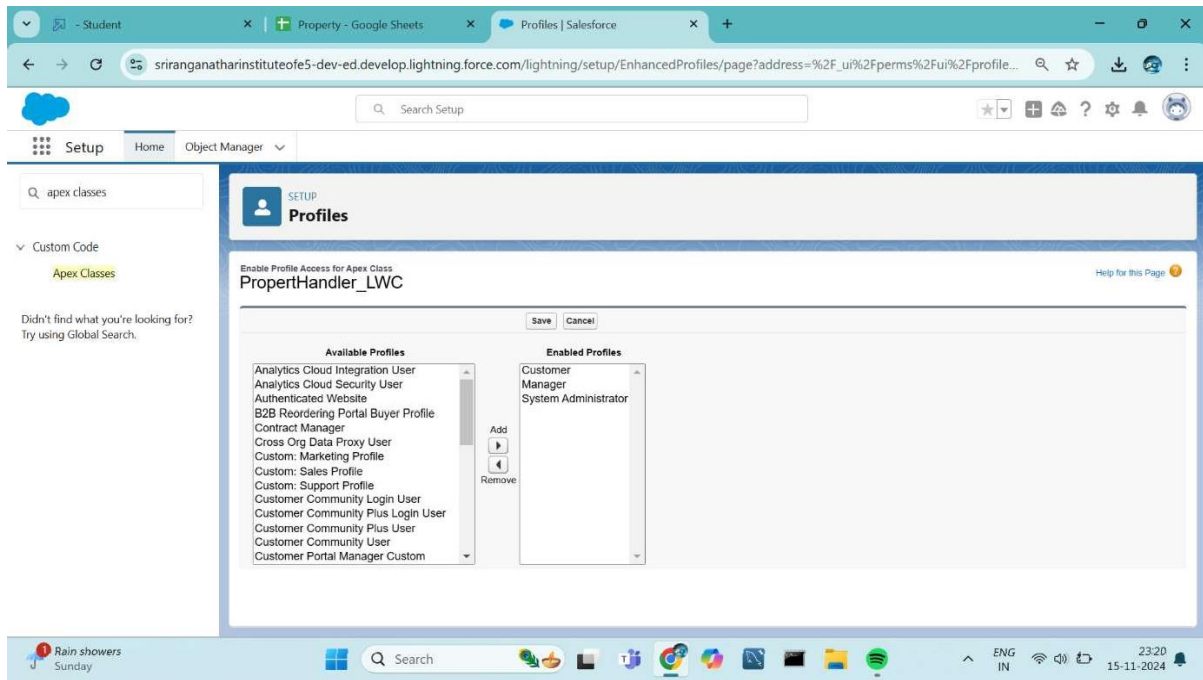




### 13. Drag This Component to Your App Page.



### 14. Give Access of Apex Classes to Profiles.



## Conclusion:

### Summary of Achievements:

The CRM application effectively integrates Salesforce with the Dreams World Properties platform, enhancing customer engagement and streamlining operations. Key achievements include:

- Automated workflows for customer and property management.
- Improved user experience with personalized recommendations.
- Efficient and secure data management through Salesforce features.