

# Customer Relationship Management (CRM) Application for Dreams World Properties

## Introduction

Dreams World Properties, a leading real estate business, seeks to enhance customer engagement and operational efficiency by integrating Salesforce as its Customer Relationship Management (CRM) solution. The platform enables seamless management of client interactions and provides personalized property recommendations, offering a superior user experience for approved users while automating the approval process for new customers.

## Project Objectives

1. **Streamline Customer Interaction:** Efficiently manage and track customer inquiries, preferences, and interactions.
2. **Automate Record Management:** Enable automated creation of customer records triggered by website engagement.
3. **Categorize Users Dynamically:** Differentiate between approved and non-approved users for tailored experiences.
4. **Enhance User Experience:** Offer personalized property recommendations to improve client satisfaction.
5. **Optimize Operational Efficiency:** Automate repetitive tasks and improve property listing management for growth and scalability.

## Functionalities

### 1. Customer Record Management

- Automated record creation in Salesforce upon website interaction.

- Integration with web forms to capture customer details like name, contact information, and property preferences.

## **2. User Categorization**

- Dynamic categorization of customers into:
  - **Approved Users:** Gain access to personalized property recommendations and tailored listings.
  - **Non-Approved Users:** Receive general property suggestions and information on how to become approved.

## **3. Property Recommendations**

- Personalized property listings for approved users based on captured preferences.
- Generalized property listings for non-approved users to encourage deeper engagement.

## **4. Salesforce Integration**

- Seamless connection between the company's website and Salesforce CRM.
- Real-time synchronization of customer data, ensuring up-to-date records for enhanced decision-making.

## **5. Dashboard and Reporting**

- Admin dashboard for monitoring customer interactions and user activity.
- Detailed reports for analysing trends, customer preferences, and sales data.

## **6. Notification System**

- Automated email notifications to customers based on their interaction history.
- Alerts for admin teams regarding high-priority customer queries or updates.

## **Additional Requirements**

### **1. Skill Requirements:**

- Proficiency in Salesforce Development and Administration.

- Familiarity with Apex, Visualforce, and Salesforce Lightning for customization.

## 2. Technology Stack:

- Salesforce CRM for data management.
- Web integration tools for seamless data synchronization.

## 3. Compliance and Security:

- Ensure data privacy and adherence to local real estate regulations.
- Implement role-based access control for sensitive customer data.

## Project Tasks:

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

The screenshot shows a web browser window with multiple tabs. The active tab is 'form.jotform.com/243173066017047'. The form is titled 'Dream World' and contains the following fields:

- Name \***: Two input fields for 'First Name' and 'Last Name'.
- Email**: A single input field.
- Phone Number**: A single input field with a placeholder '(000) 000-0000'.
- Which type of property are you looking for?**: Three radio button options: 'Residential', 'Commercial', and 'Retail'.
- Budget Amount**: A single input field with a placeholder 'e.g., \$5'.
- Address**: Three input fields for 'Street Address', 'City', and 'State/Zip Code'.
- Submit**: A green button at the bottom of the form.

The browser's taskbar at the bottom shows the Windows Start button, a search bar, and various application icons. The system tray on the right indicates the date and time as '15-11-2024' and '23:02'.

2. Create Objects from Spreadsheet.

Customer

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

Property

Property Name	Type	Location	Verified
Lotus Appartmer	Residential	hyderabad	checked
500000 sq.ft plot	Commercial	Amravati	unchecked
3 Bhk flat at star rental		Jubilee hill Hyde	Checked

Customer

Details

Description  
Customer details

API Name  
Customer\_c

Custom  
✓

Singular Label  
Customer

Plural Label  
Customer

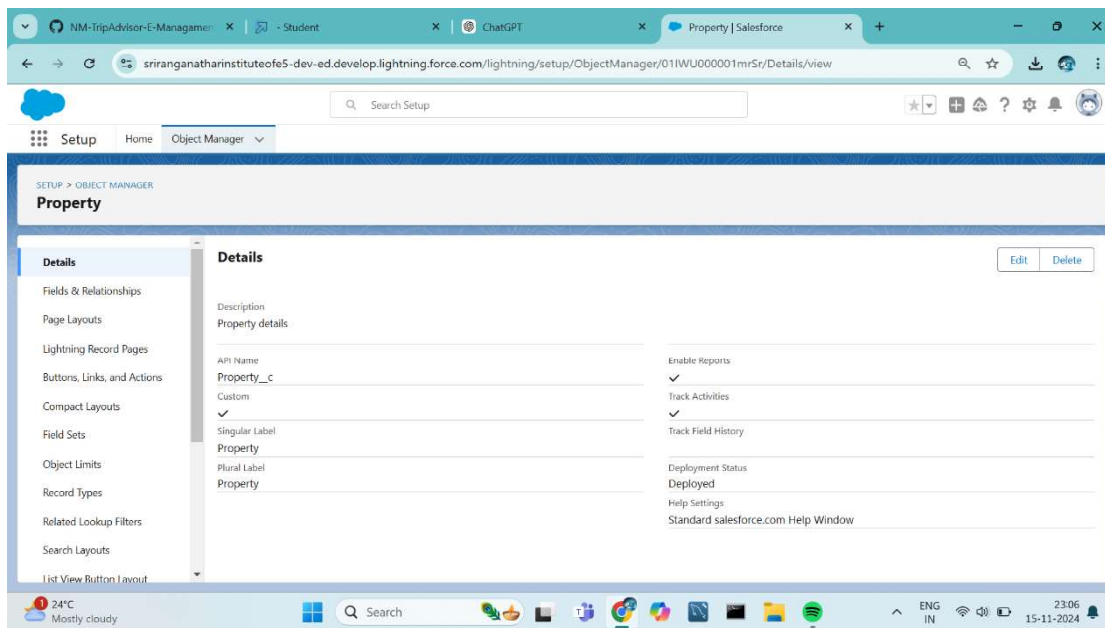
Enable Reports  
✓

Track Activities  
✓

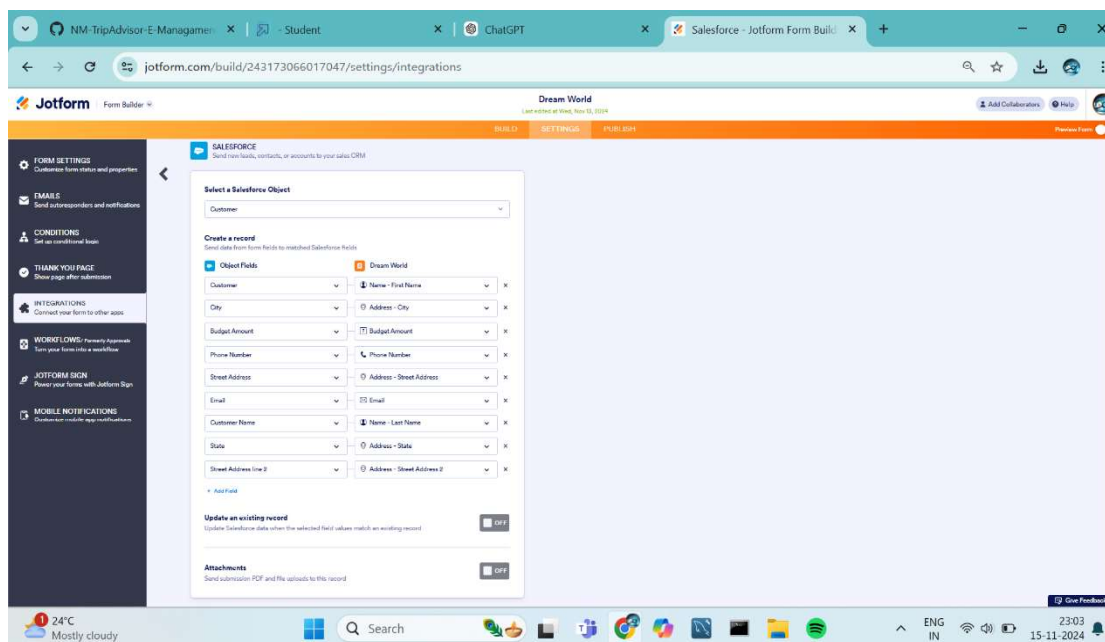
Track Field History

Deployment Status  
Deployed

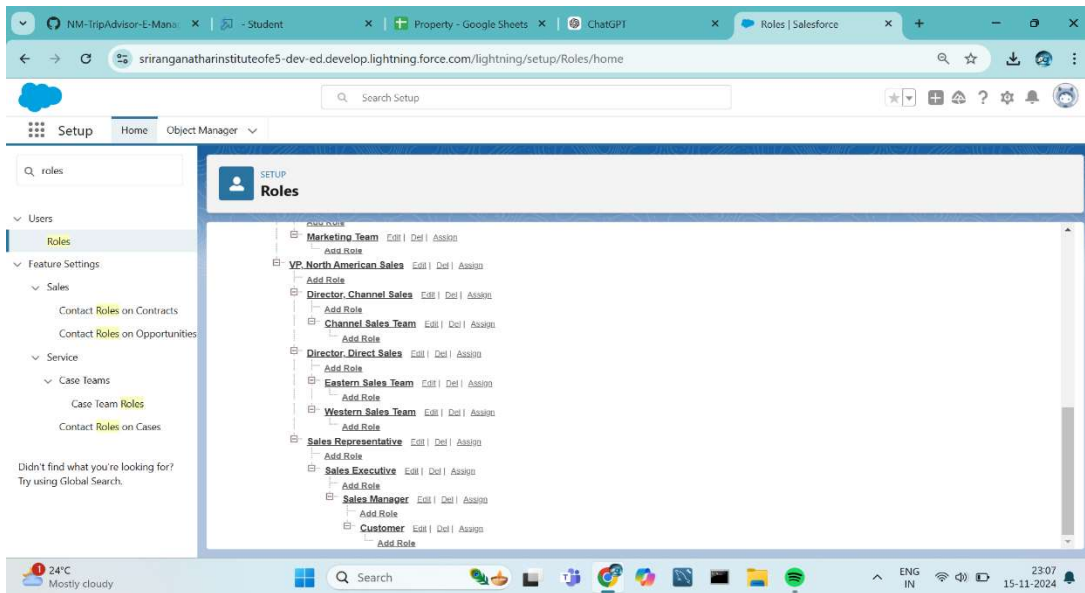
Help Settings  
Standard salesforce.com Help Window



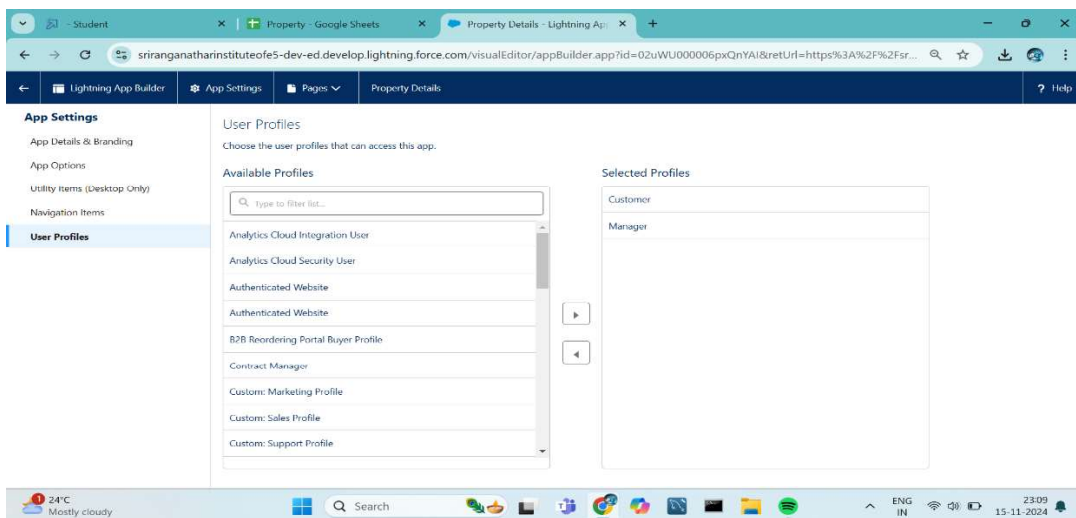
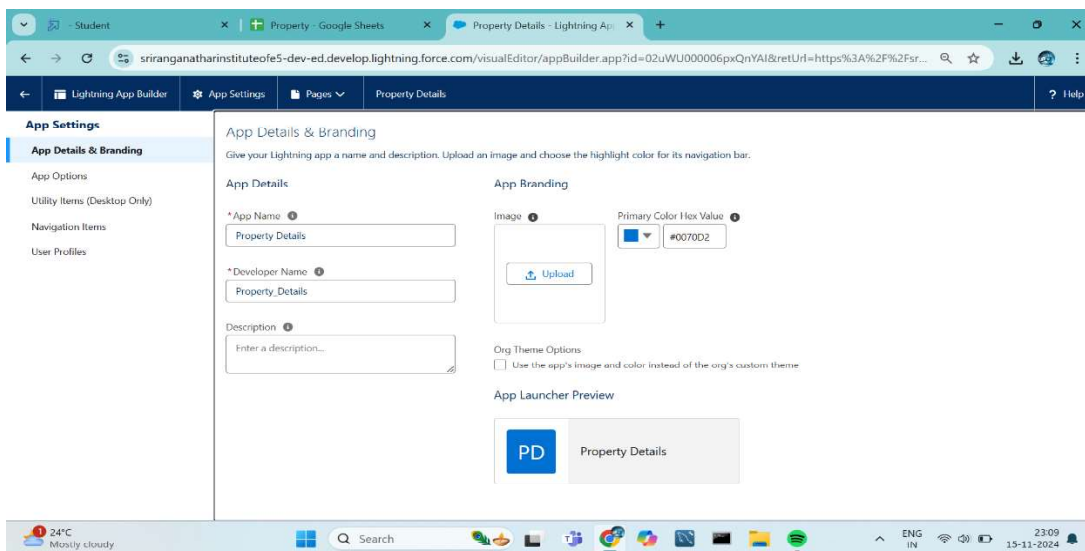
### 3. Integrate JotForm with Salesforce Platform.



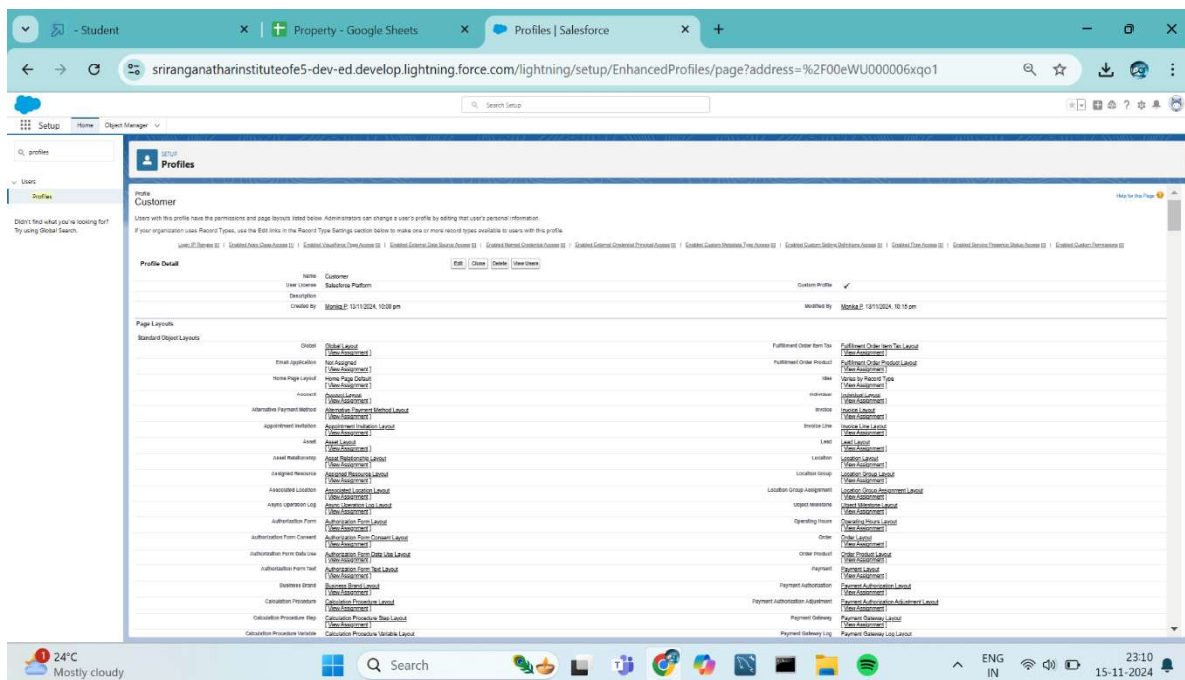
### 4. Create Roles.



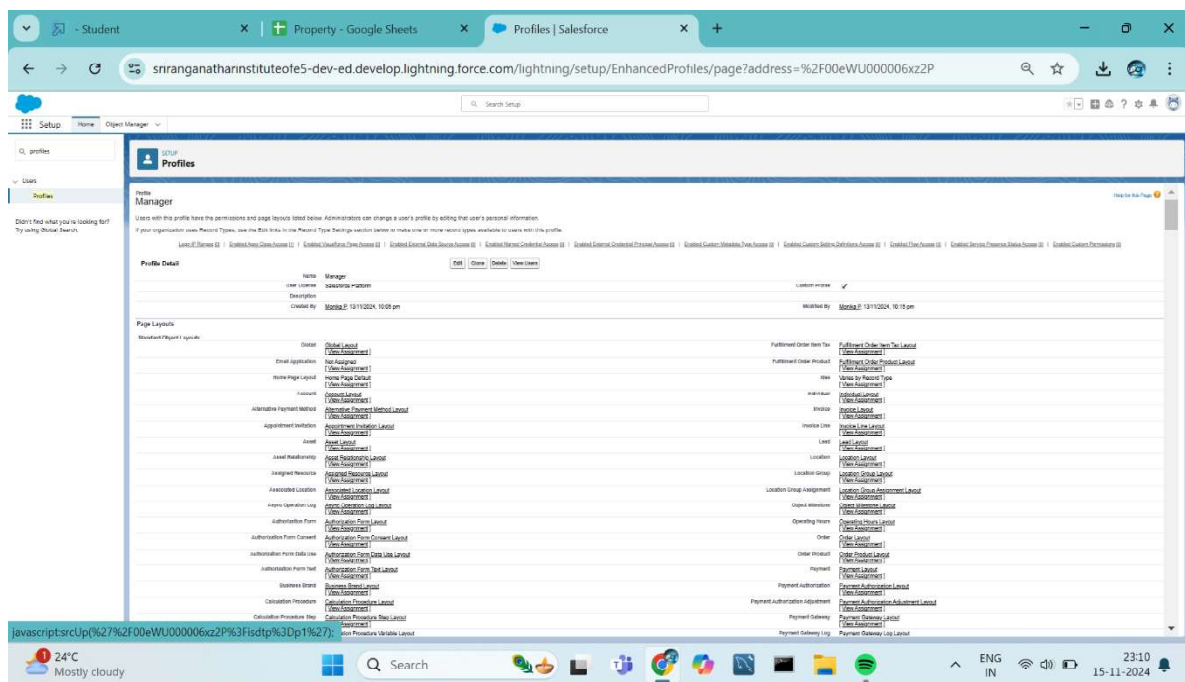
## 5. Create A Property Details App.



## 6. Create Profiles.



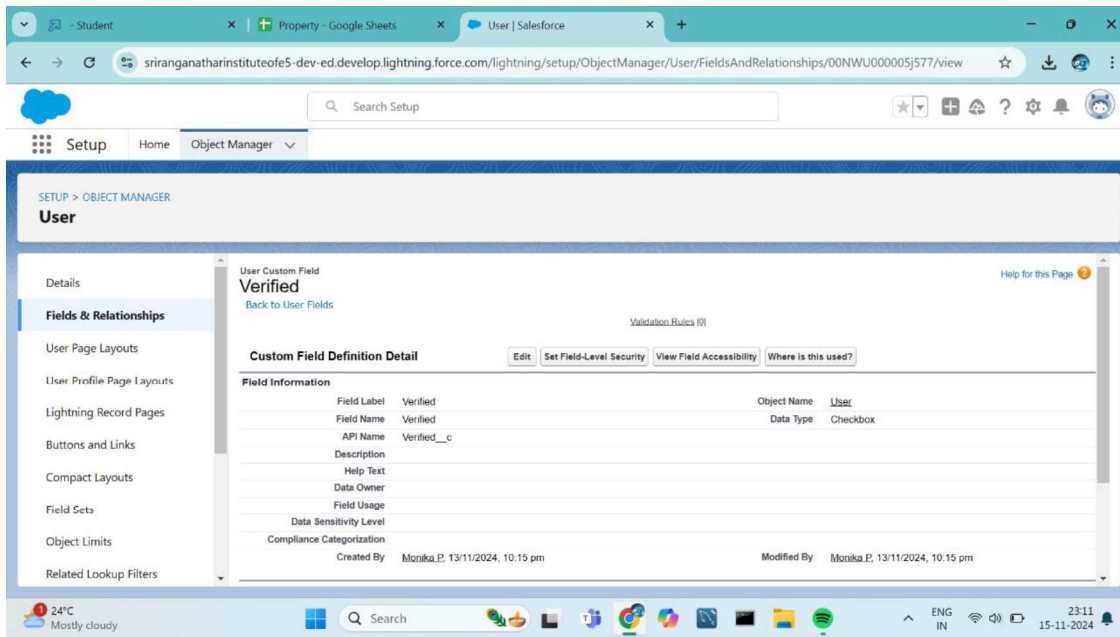
The screenshot shows the Salesforce Setup page for the 'Profiles' section. The 'Customer' profile is selected, and the 'Page Layouts' tab is active. The page displays a list of page layouts assigned to the profile, including 'Standard Object Layouts' and 'Custom Page Layouts'. The 'Customer' profile is assigned the 'Standard Object Layouts' and 'Custom Page Layouts'.



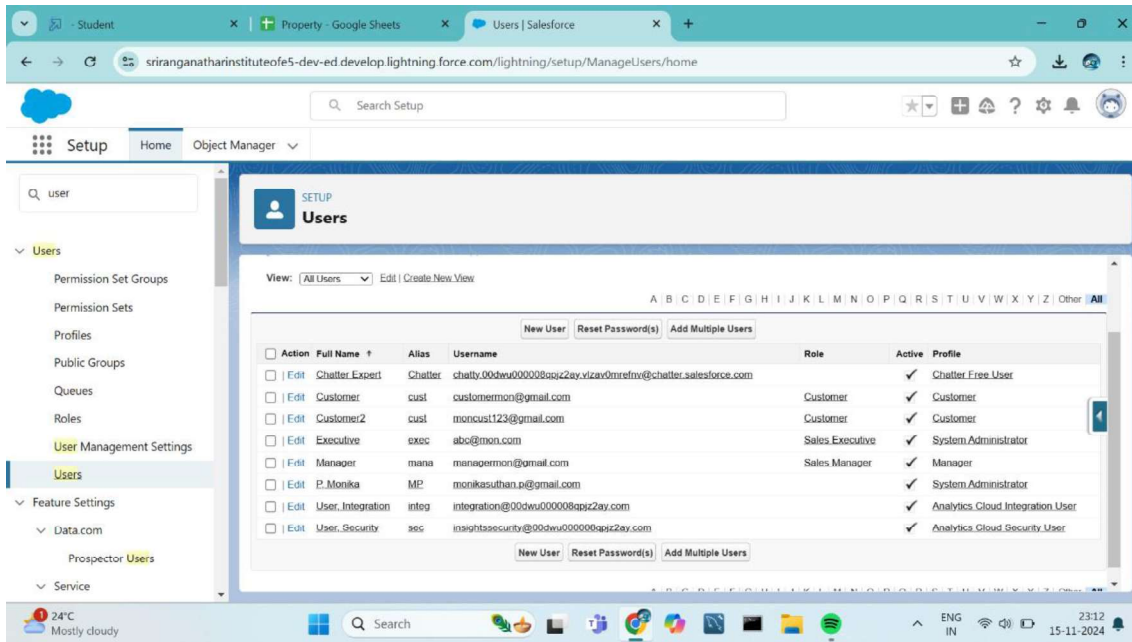
The screenshot shows the Salesforce Setup page for the 'Profiles' section. The 'Manager' profile is selected, and the 'Page Layouts' tab is active. The page displays a list of page layouts assigned to the profile, including 'Standard Object Layouts' and 'Custom Page Layouts'. The 'Manager' profile is assigned the 'Standard Object Layouts' and 'Custom Page Layouts'.

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



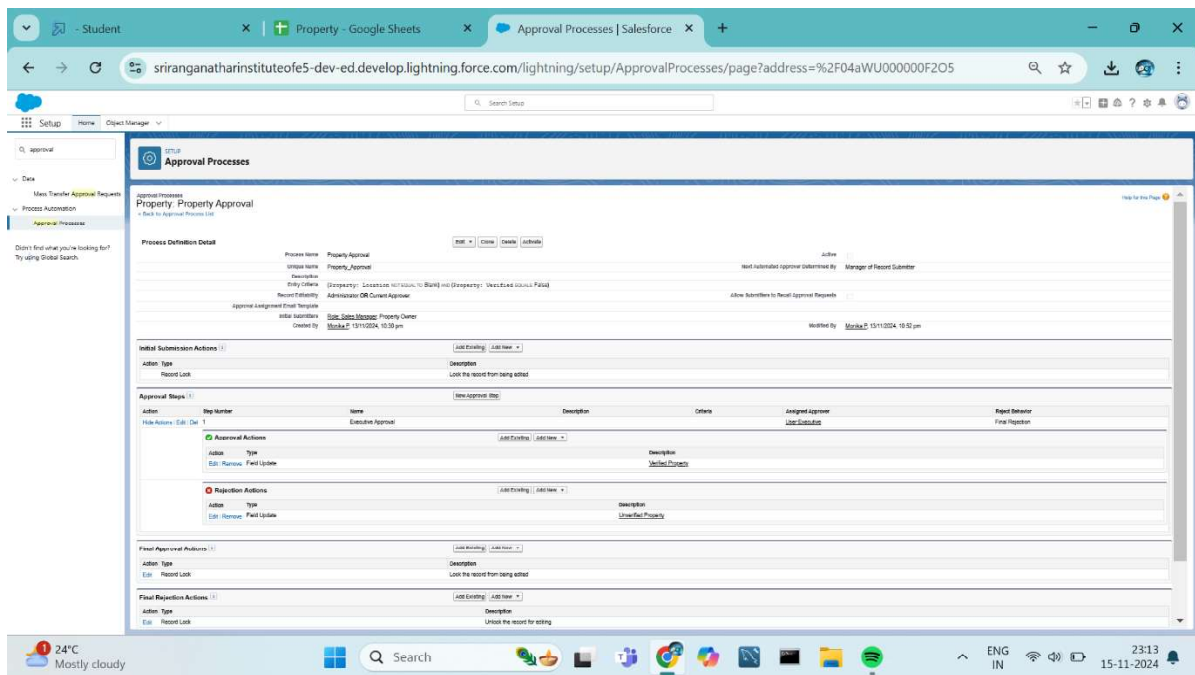


## 8. Create Users.

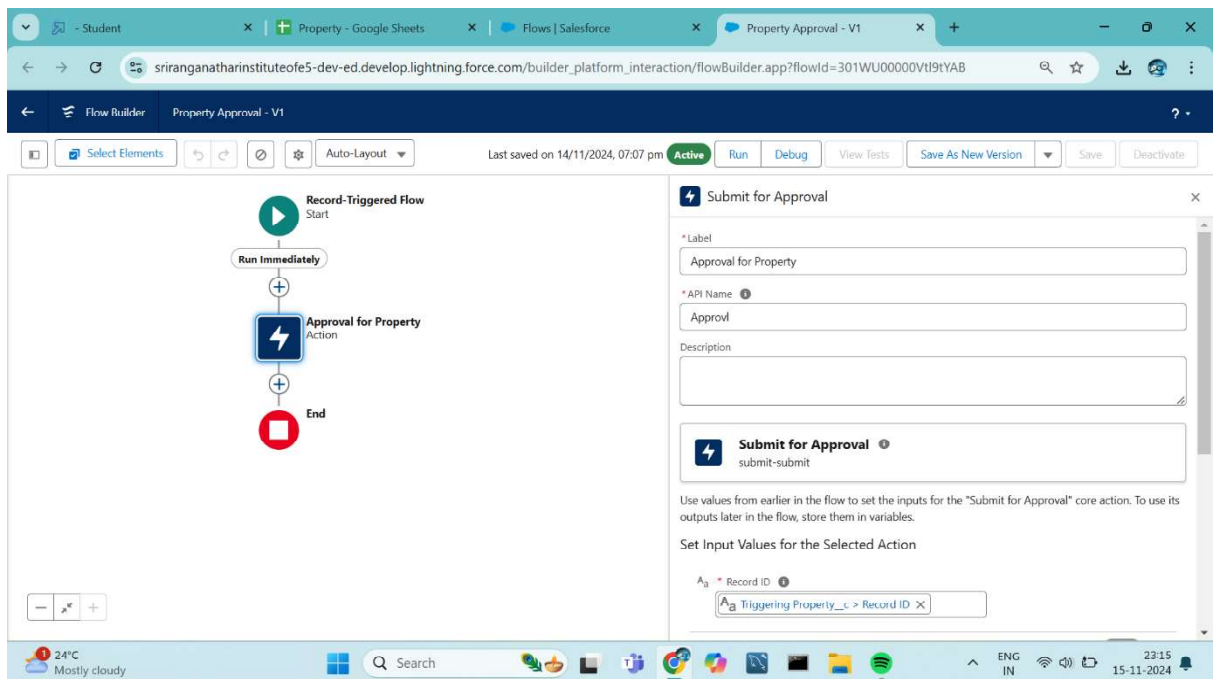


## 9. Create An Approval Process for Property Object.

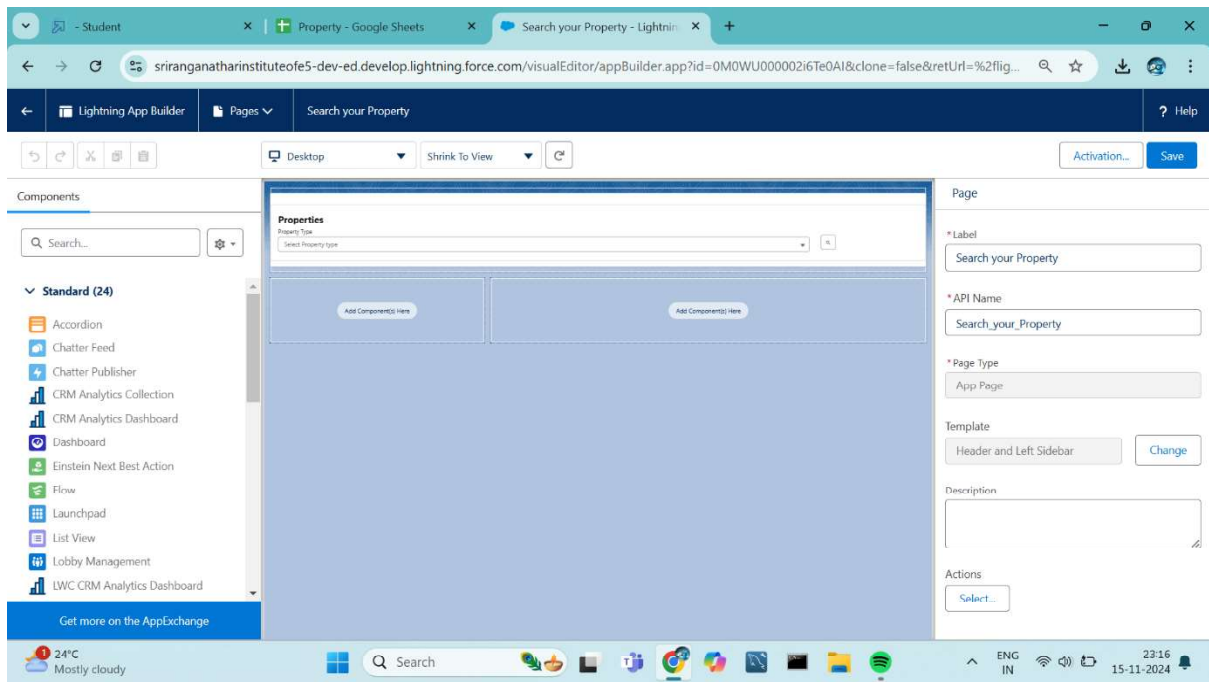




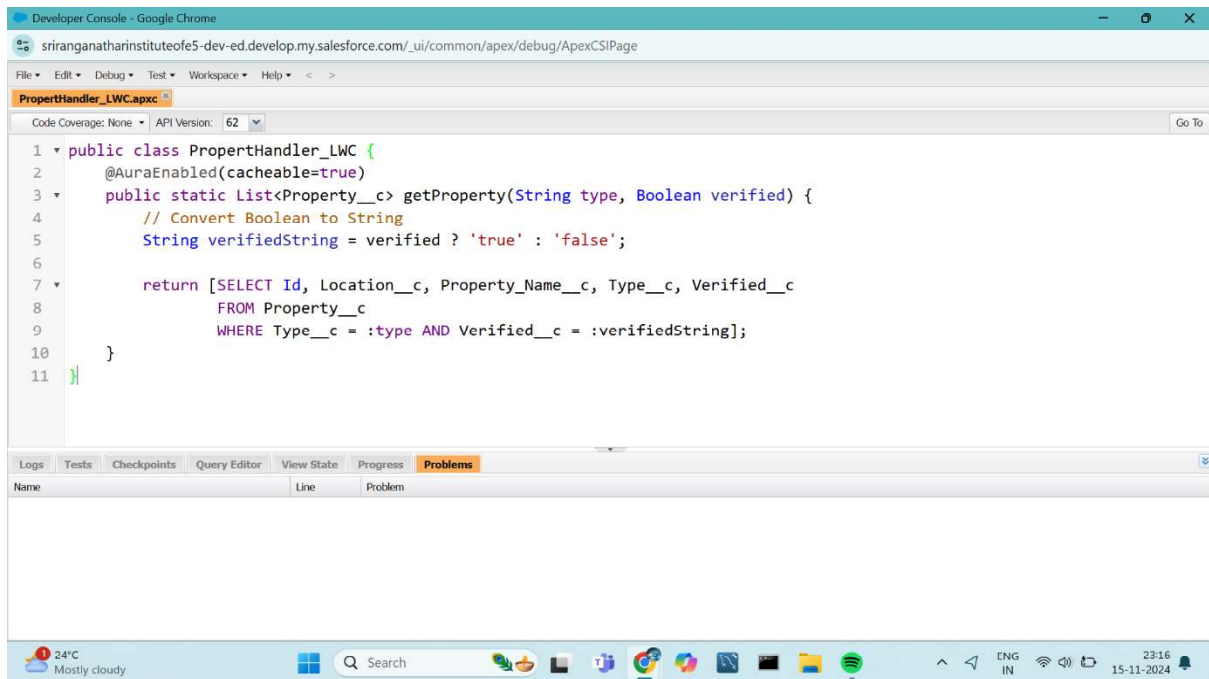
## 10. Create A Record Trigger Flow to Submit the Approval Process Automatically.

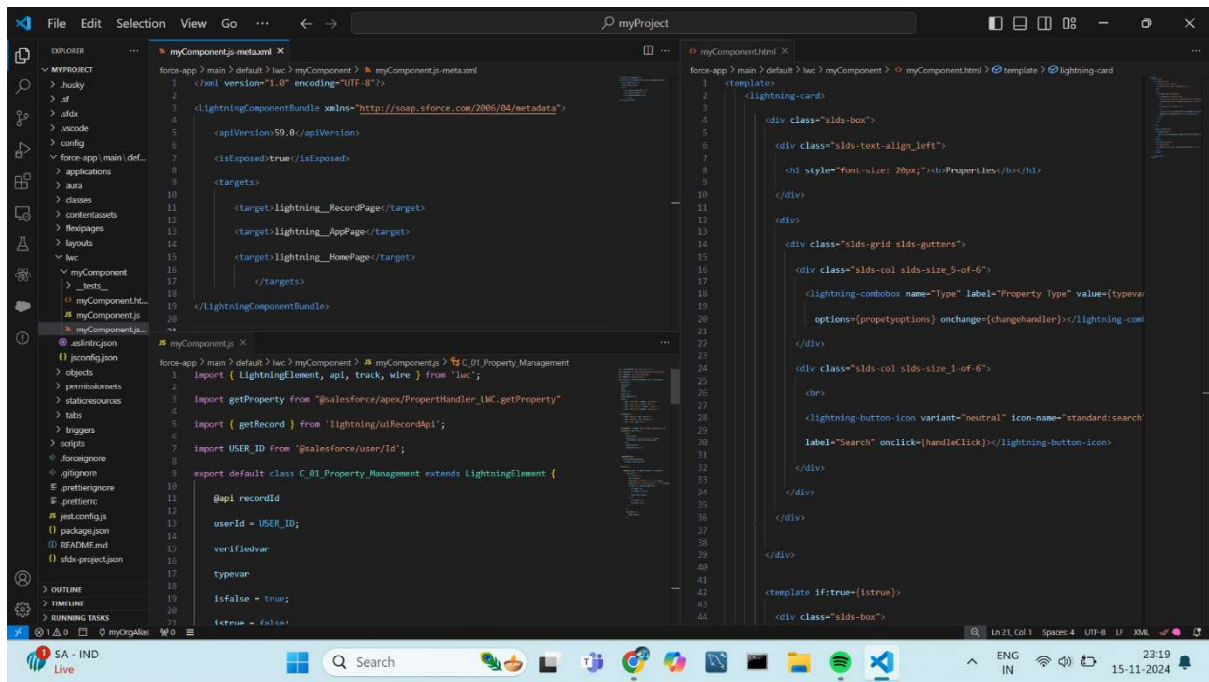


## 11. Create An App Page.

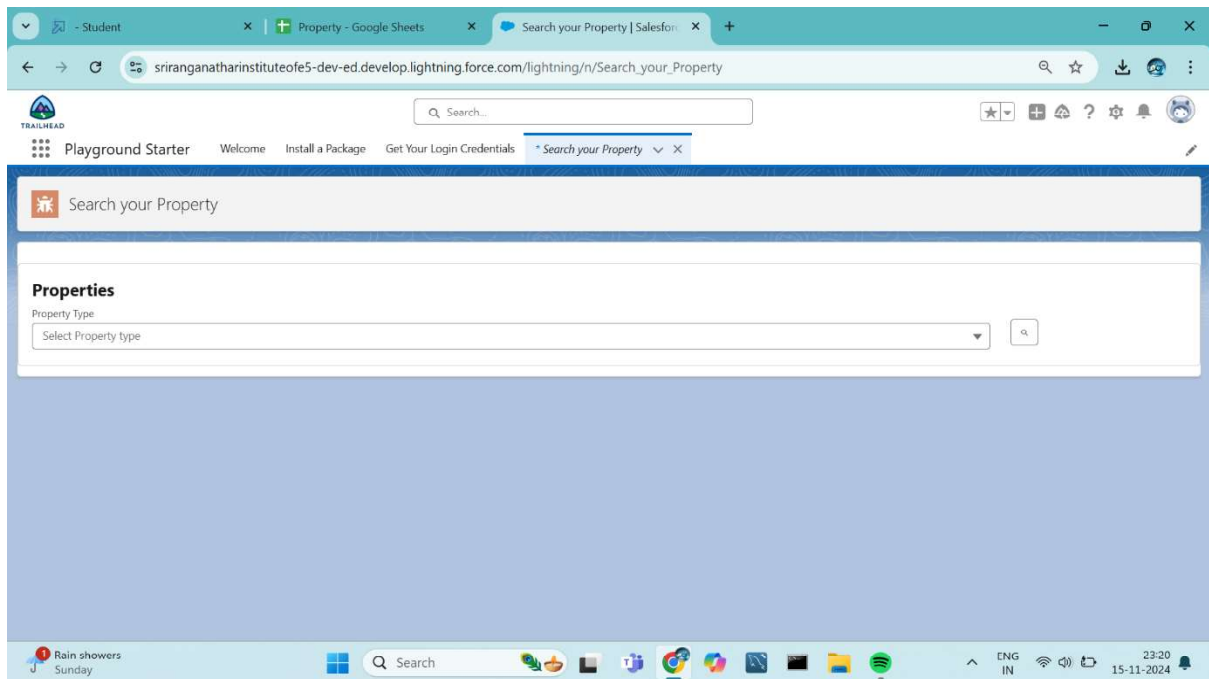


## 12. Create A LWC Component.

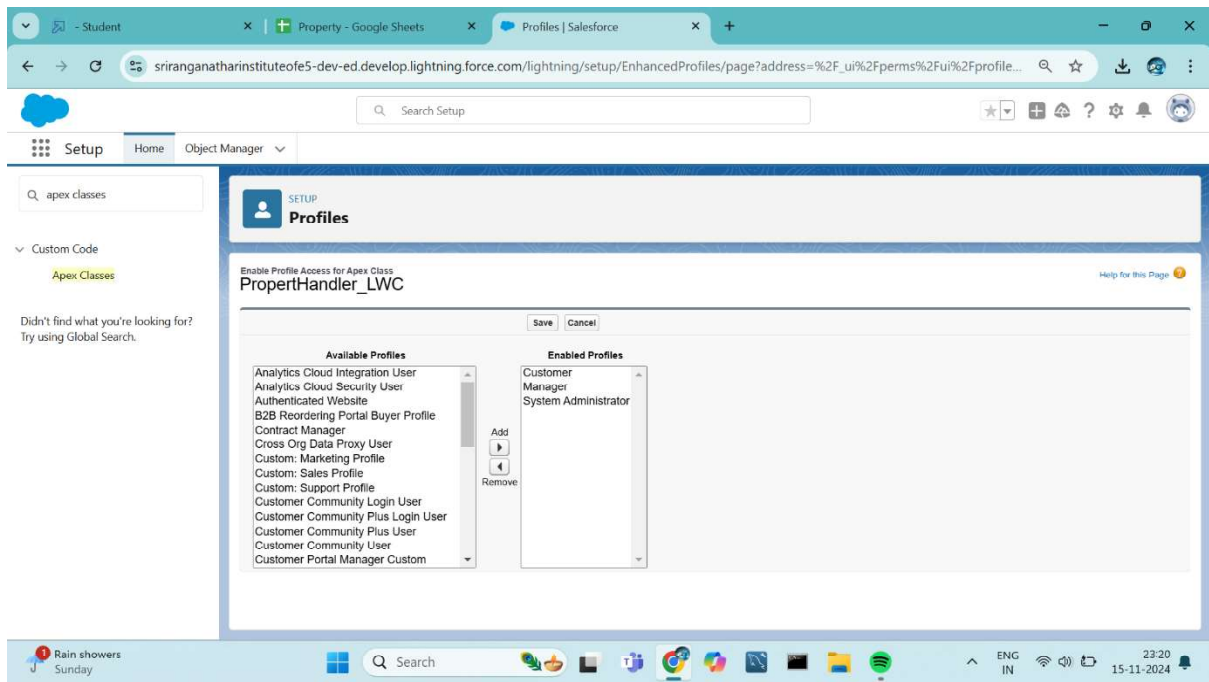




### 13. Drag This Component to Your App Page.



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



## Conclusion

The proposed CRM application for Dreams World Properties leverages Salesforce to optimize client interactions and enhance operational efficiency. With features like automated record creation, user categorization, and personalized property recommendations, the solution ensures improved customer satisfaction and streamlined processes. This integration will position Dreams World Properties as a market leader in real estate, providing an innovative and user-centric platform that drives business growth.