

1. Project Overview

- **Title:** A CRM Application to Handle the Clients and Their Property-Related Requirements
- **Objective:** To develop a CRM system that integrates Salesforce to streamline customer interactions, automate record creation, and enhance the overall experience in property management.
- **Technology Stack:** Salesforce, Jotform, Apex, LWC (Lightning Web Component)
- **Project Duration:** 30 days
- **Team Members:** 1

2. Milestones and Tasks

This section will cover each milestone and its associated tasks in detail.

Milestone 1: Create a Jotform and Integrate it with the Organization

- **Objective:** Automate the process of customer record creation by integrating Jotform with the organization's Salesforce platform.
- **Tasks:**
 - **Create Objects from Spreadsheet:** Import customer data from spreadsheets to Salesforce, ensuring accurate data migration.
 - **Integrate Jotform with Salesforce Platform:** Set up integration to automatically populate Salesforce records based on Jotform submissions.
- **Purpose:** Streamlines data entry and ensures that customer information is captured directly from online forms, reducing manual errors.

Milestone 2: Create Roles and Profiles

- **Objective:** Define access control by creating roles and profiles in Salesforce to manage permissions.
- **Tasks:**
 - **Create Roles:** Set up a hierarchy of roles to determine what data each user can access based on their role in the organization.
 - **Create Profiles:** Establish profiles to manage permissions for users based on their job functions.
 - **Create a Checkbox Field on User:** Add a custom checkbox field to track specific attributes of users, such as whether they have completed training or certification.
- **Purpose:** Ensures data security by controlling access based on user roles, while allowing

flexibility through custom profiles.

Milestone 3: Create Users and an Approval Process

- **Objective:** Set up user accounts and automate the approval process for property-related records.
- **Tasks:**
 - **Create Users:** Add new users to Salesforce, assigning them appropriate roles and profiles.
 - **Create an Approval Process for Property Object:** Automate the workflow for approving property-related records, ensuring that only authorized personnel can approve changes.
 - **Create a Record Trigger Flow to Submit the Approval Process Automatically:** Develop a flow that triggers the approval process whenever a new property record is created or modified.
- **Purpose:** Automates routine tasks and ensures that all property-related transactions are verified by the appropriate stakeholders, improving operational efficiency.

Milestone 4: Develop the Application Interface

- **Objective:** Build and customize the user interface for the CRM application.
- **Tasks:**
 - **Create an App Page:** Develop a custom app page to serve as the main interface for users interacting with the CRM system.
 - **Create a LWC Component:** Build a Lightning Web Component to display dynamic content and enhance user interaction.
 - **Drag the Component to the App Page:** Integrate the LWC component into the app page, ensuring a seamless user experience.
- **Purpose:** Provides a user-friendly interface that allows users to efficiently manage customer and property data.

Milestone 5: Finalize and Secure the Application

- **Objective:** Ensure the application is secure and accessible only to authorized users.
- **Tasks:**
 - **Give Access of Apex Classes to Profiles:** Assign permissions for Apex classes to specific profiles, ensuring that only users with the necessary rights can execute critical functions.
- **Purpose:** Enhances security by restricting access to sensitive code and functionalities

based on user profiles.