# PROJECT TITLE : A CRM coating to Handle the Clients and their Property Related Requirements

## Overview:

The "CRM coating to Handle Clients and Their Property-Related Requirements" is an end-to-end solution developed on the Salesforce platform. This project aims to streamline property management for real estate concern by automating client record creation, form property listings, and apply secure, role-based access control. It enhances the efficiency of managing client data and property listings while providing a tailored customer undergo based on check status.

This project includes three major components:

1. **Automated Client Data Collection and Integration:**
   To simplify customer data intake, the project integrates Jot-form with Salesforce. Jot-form serves as a user-friendly interface for collecting customer data, which is directly submitted to Salesforce, where a new customer record is automatically created upon each form submission. This integration minimise manual data entry, reduces errors, and speeds up client onboarding.
2. **Property Management and Approval Workflow:**
   A consecrate Property Details App centralize all property data, making it easier to manage listings, track property details, and ease approvals. Each property record undergoes an approval process before it is published, ensuring that only properties meeting the agreement's standards are accessible to customers. An automated record-triggered flow further streamlines this process by auto-submitting property records for approval, reducing the need for manual intervention.
3. **Role-Based and Verification-Based Access Control:**
   Access control is a key feature of this CRM solution. Profiles and roles are created based on business demand to limit data profile and actions based on user roles. in addition, a custom Lightning Web Component (LWC) is developed to manage property visibility based on customer verification status. Verified customers have access to verified properties, whereas non-verified customers are restricted to non-verified property listings. This feature enhances protection by ensuring that only authorized users have access to sensitive property data, while still providing non-verified users access to relevant listings.

## Objectives:

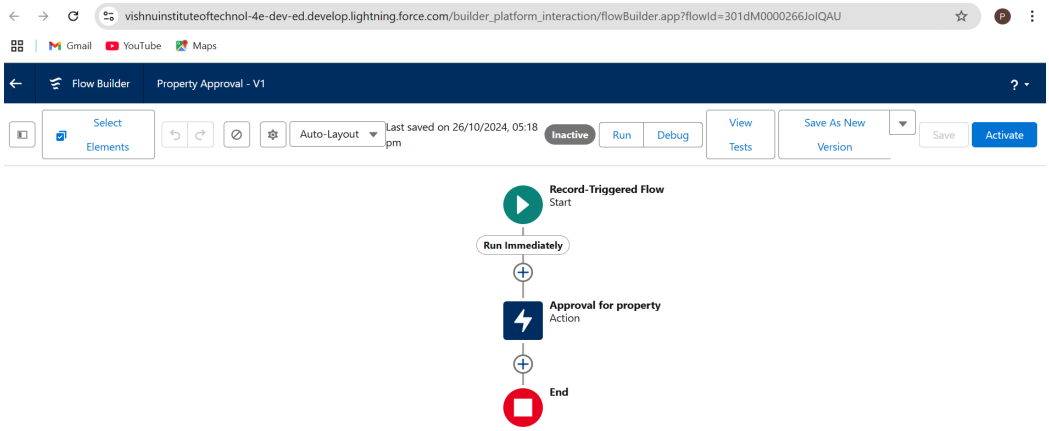
- **Automate Customer Data Collection and Record Creation**
    - Integrate Jot-form with Salesforce to streamline customer onboarding by automatically bring forth customer records, minimize manual data entry, and reducing errors.
- **Centralize and Organize Property data**
    - Develop a Property Details App to provide a centralized platform for managing property listings, allowing efficient tracking, updating, and governance of property data.
- **Implement Role-Based Access Control**
    - Establish roles and profiles tailored to business needs, ensuring secure access control within Salesforce, so that team members can access only the data and functions essential for their roles.
- **Enable Property Access Based on Customer Verification**
    - Create a custom Lightning Web Component (LWC) that dynamically controls property vileness based on customer check status, allowing verified customers to view verified properties while restricting non-verified customers to non-verified listings.
- **Automate the Approval Process for Property Listings**
    - Set up an automated approval workflow for property records to ensure that only reviewed and approved properties are listed, enhancing data accuracy and reducing administrative load.
- **Enhance Customer Experience and Data Security**
    - Design the CRM to provide a premium and secure undergo for verified customers, ensuring data unity and precaution sensitive information through structured access protocols.
- **Streamline Real Estate Operations**
    - Deliver a CRM solution that improves overall functional efficiency, making it easy for real estate concerns to manage clients and properties, enforce business policies, and provide personalized service to customers.

## Salesforce Key Features and Concepts Used:

1. **Jot-form Integration with Salesforce**
    - mix Jot-form with Salesforce to automate customer record creation from form submissions, streamlining the data collection and onboarding process.
2. **Custom Objects Creation from Spreadsheets**
    - Created custom objects in Salesforce by importing data from spreadsheets,

ensuring easy migration of existing client and property data into the Salesforce environs.

3. **Roles and Profiles for Access Control**
    - enforce roles and profiles tailored to business needs to manage data vileness and permissions, providing a secure and structured access control system for different user groups.
4. **Approval Process**
    - Configured an approval process specifically for property records to ensure all listings are reviewed and meet company standards before being made accessible to customers.
5. **Record-Triggered Flow**
    - Designed a record-triggered flow that automatically submits property records for approval, reducing manual intervention and speeding up the property listing process.

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6. **Property Details App**
    - Built a consecrate Property Details App to centralize all property-related data, simplify property management, and ensure all property entropy is accessible within a single coating.
7. **Lightning Web Component (LWC)**
    - Developed a custom LWC component to control access to properties based on customer check status. Verified customers can view verified properties, while non-verified customers are limited to non-verified listings.
8. **Custom Checkbox Field on User Object**
    - Added a custom checkbox on the User object to track customer check status, enabling dynamic content display and streamlined check-based access to property data.
9. **App Page Creation**

    - Created an app page within Salesforce to provide an organized interface where users can access the Property Details App, Lightning Web Component, and other relevant CRM data in one centralized location.

10. **Apex Class Access Control**

- Set up access to Apex classes based on profiles, ensuring users only have permissions to execute specific backend code relevant to their roles, enhancing both protection and functionality.

## Detailed Solution Design Steps:

- **Project Requirement Analysis**
    - Conduct a thorough analysis of the business demand for the CRM coating, focusing on client and property management needs.
    - Gather input from stakeholders to understand the desired functionalities, user roles, and protection demand.
- **Selection of Tools and Technologies**
    - Choose Salesforce as the platform for the CRM coating due to its robust features and customization inescapable.
    - Opt for Jot-form to ease customer data collection through forms that integrate seamlessly with Salesforce.
- **Jot-form Creation and Integration**
    - Design a user-friendly Jot-form to collect essential customer information, ensuring fields align with the required data for Salesforce.
    - Set up integration between Jot-form and Salesforce using APIs or third-party connectors to enable robot like record creation in Salesforce upon form submission.
- **Object Creation from Spreadsheets**
    - Prepare existing customer and property data in spreadsheet format for import into Salesforce.
    - Utilize Salesforce's data import tools (e.g., Data Loader or Import Wizard) to create records from the spreadsheet, ensuring data accuracy and unity.
- **Role and Profile Configuration**
    - Define user roles based on the organizational structure and business needs.
    - Create profiles to control access to specific objects and fields, ensuring users have the appropriate permissions to perform their roles.
- **Approval Process Setup**
    - Design an approval process for the Property object that includes stages for review and approval, ensuring compliance with business standards.
    - Configure workflow rules and presentation to inform relevant users when

properties require approval.

- **Record-Triggered Flow Development**
  - Create a record-triggered flow to automate the submission of property records for approval when certain standard are met (e.g., a new property is added).
  - Define the flow's logic to handle the approval process automatically, reducing manual workload.
- **App Page Creation**
  - Design and create an app page in Salesforce to serve as the main interface for users, integrating key components like the Property Details App and LWC component.
  - Ensure the app page is user-friendly and visually organized for easy pilot age.
- **Lightning Web Component (LWC) growth**
  - Develop a custom LWC to manage property vileness based on customer check status.
  - Implement the essential logic to display verified properties to verified customers and restrict non-verified customers to non-verified listings.
- **Custom Checkbox performance**
  - Add a custom checkbox field to the User object to track each customer's check status (verified or non-verified).
  - Integrate this field into the LWC to control access to property listings dynamically.
- **Post-Deployment Support and Enhancements**
  - Provide ongoing support for users and gather feedback to name areas for betterment.
  - Plan for future enhancements based on user needs and evolving business demand, ensuring the CRM coating continues to meet organizational goals.

## Testing and Validation:

- **Unit Testing**: single components and functions were tested in isolation to verify their correctness and functionality. This included testing the Jot-form integration, approval process, and Lightning Web Component (LWC).
- **Integration Testing**: After unit testing, the interaction between different components (e.g., Jot-form to Salesforce, approval process workflows, and the LWC) was assessed to ensure they work together seamlessly.
- **User Acceptance Testing (UAT)**: End users were involved to validate the coating against the business demand. Feedback was gathered to ensure that the coating met user outlook and workflows.

## Key Scenarios Addressed in the Salesforce  Implementation:

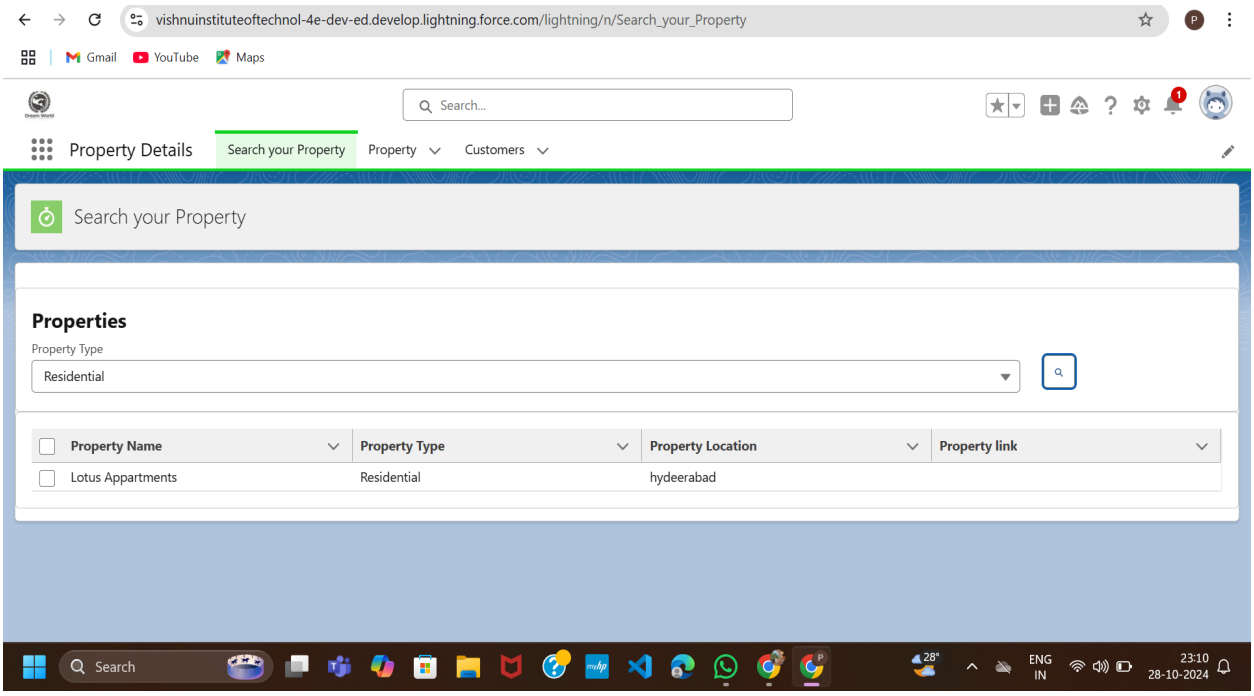
- **Efficient Property Management**
  - Users can easily add and manage property listings through a consecrate Property Details App, ensuring all property information is organized and accessible.
- **Streamlined Approval Process**
  - New property records are automatically submitted for approval, ensuring that only reviewed properties are made usable to customers, maintaining quality and compliance.
- **Role-Based Access Control**
  - Different user roles are created to control who can access specific data and functionalities. For example, agents may have full access while customers have limited access.
- **Verification-Based Property Access**
  - Verified customers can view verified properties, while non-verified customers only see non-verified listings. This helps protect sensitive info and enhances user experience.
- **User-Friendly Interface**
  - The coating includes a clean and organized app page that allows users to navigate easily and access the features they need without confusion.
- **Integration with Existing Data**
  - Existing customer and property data can be imported from spreadsheets, ensuring a smooth transition and continuity of data.
- **Customizable User Profiles**
  - Each user can have a profile tailored to their specific needs and roles, providing a personalized experience while ensuring protection.

## Conclusion:

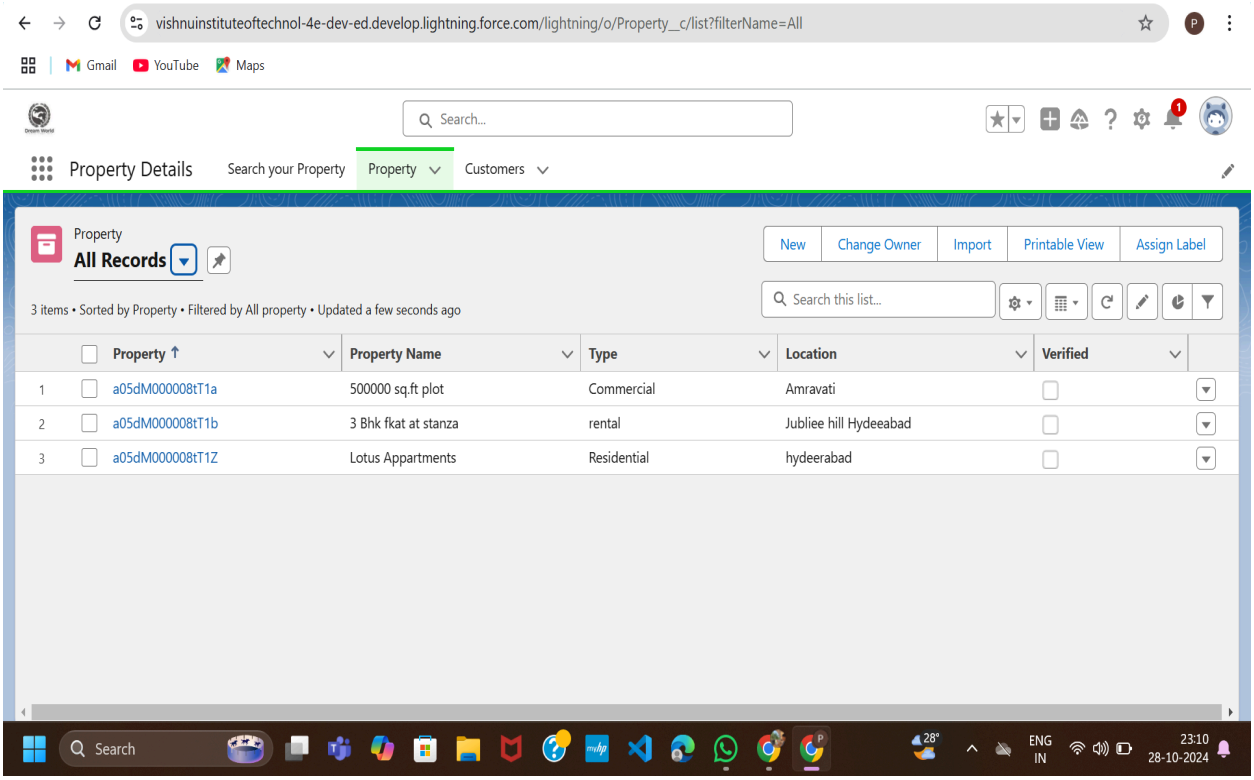
The "CRM coating to Handle Clients and Their Property-Related Requirements" purchase Salesforce to enhance client and property management in real estate by automating record creation through Jot-form and centralizing data in a dedicated Property Details App. With role-based access control and confirmation-based property visibility, the coating ensures data security while offering a tailored user experience. Engaging end-users during testing has resulted in a solution that meets both business needs and user outlook. Overall, this execution significantly streamlines operations, improves data integrity, and enhances customer satisfaction, positioning the organization for future growth and adaptability.

# INTERFACE OF APPLICATION:

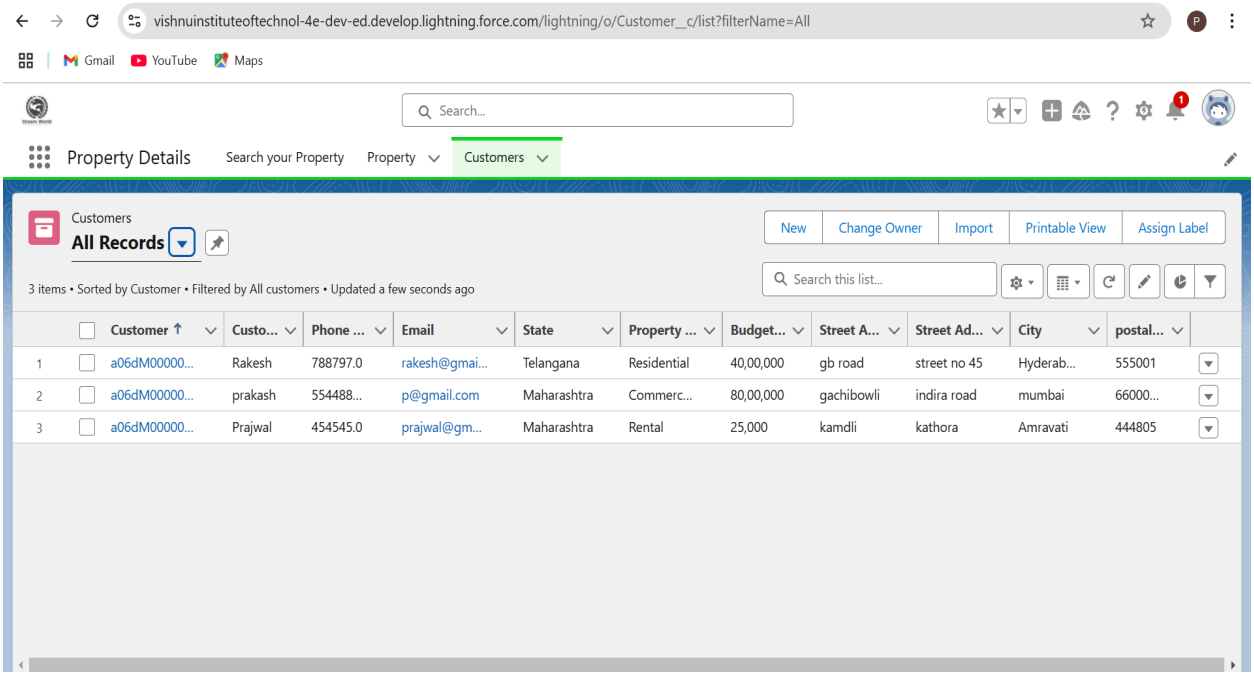
## Search your Property:




## Property:



# Customers: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