

Dreams World

All changes saved at 10:55 AM

BUILDSETTINGSPUBLISH

## Form

Name \*

First NameLast 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  
☐ COMMERCIAL  
☐ RENTAL

Budget Amount \*

e.g., 23

Address

Street Address

Street Address Line 2

CityState / Province

Postal / Zip Code

Submit

+ ADD NEW PAGE HERE

If you want to remove Jotform Branding, please upgrade your account

Jotform

Now create your own Jotforms - It's Free

Create your own Jotform

## 2.Create Objects from Spreadsheet.(Customer and Property Object)

object-creator.salesforce.com/load-data-wizard.xhtml

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

CSV File Details

Encoding Format: Unicode (UTF8)

Values Separated By: Comma

Field Label Source: ☐ Enter manually ☒ Detect from row

\* Field Labels Row: 1

Import 3 rows of Data? ☐ No, skip import ☒ Yes, import data

Record Name Field: Let Salesforce Create a D...

Data Preview

CUSTOMER	PHONE NUMBER	EMAIL	STATE	PROPERTY TYPE	BUDGET AMOUNT	STREET ADDRESS	STREET ADDRESS LINE 2	CITY	POSTAL CODE	VERIFIED
Rakesh	788797	rakesh@gmail.com	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

Back Next

object-creator.salesforce.com/load-data-wizard.xhtml

Create a custom object from a spreadsheet

Nice Work!

Now you can add your object to a Lightning app. You might need to refresh the object list to see it.

Import Overview

Object Created: Customer - Sheet1

Fields Detected: 11 Fields Created: 11

Rows Detected: 3 Rows Imported: 3

Import Another Object

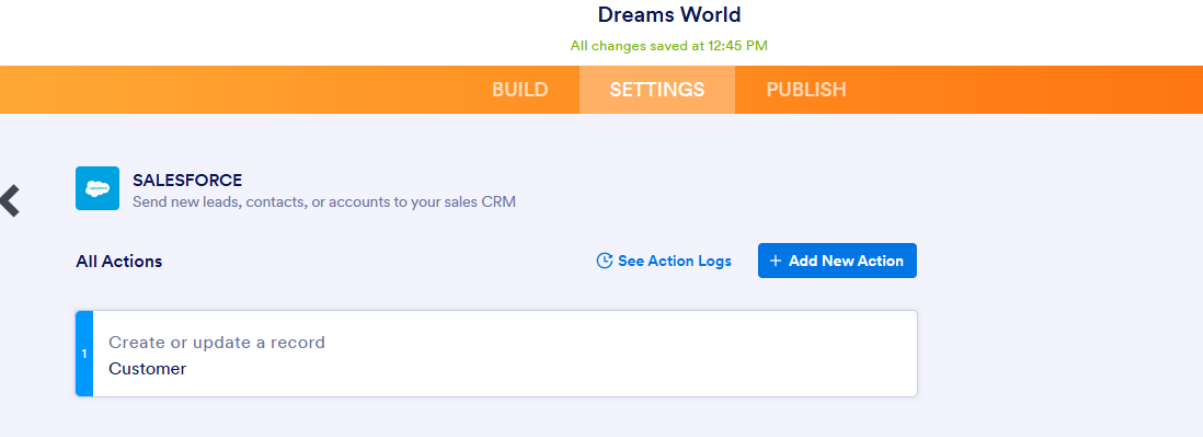
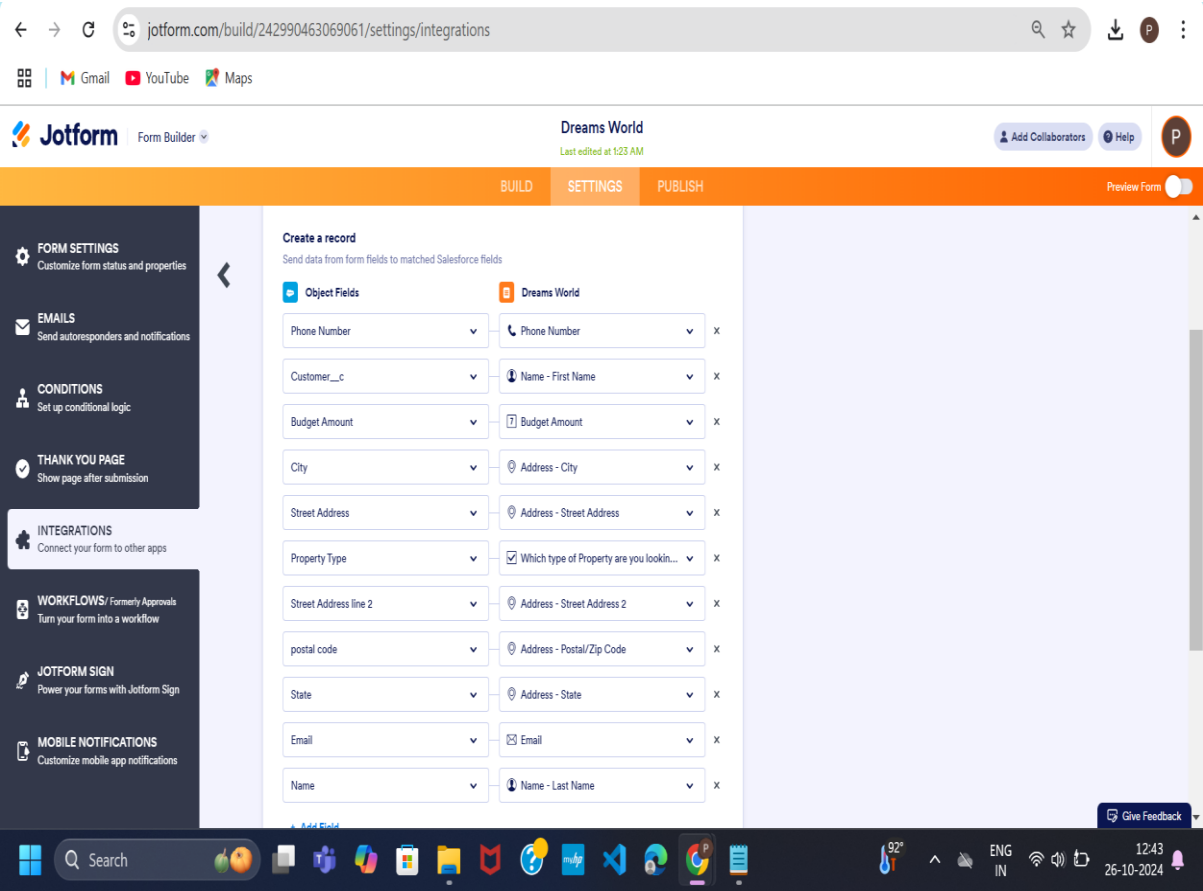
Setup Home Object Manager

Object Manager

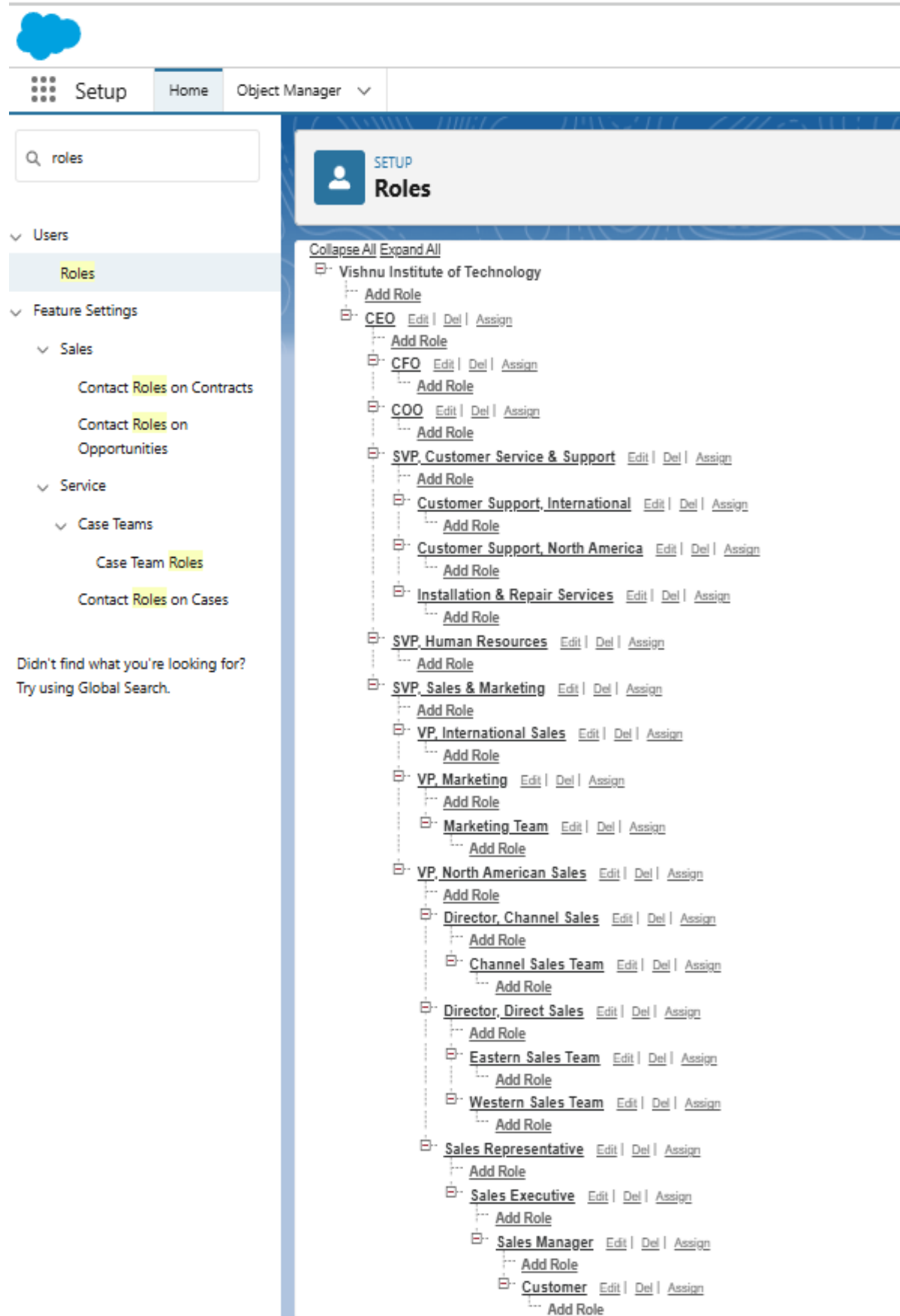
50+ Items, Sorted by Last Modified

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer__c	Custom Object		28/10/2024	✓
Property	Property__c	Custom Object		26/10/2024	✓
Department	Department__c	Custom Object		11/08/2024	
Activity	Activity__c	Custom Object		11/08/2024	
Student	Student__c	Custom Object		11/08/2024	
Faculty	Faculty__c	Custom Object	Text	30/07/2024	

### 3. Integrate Jotform with Salesforce Platform



## 4. Create Roles



The screenshot displays the Salesforce Setup interface for managing roles. The left sidebar contains a navigation menu with 'Users' and 'Feature Settings' expanded. Under 'Feature Settings', 'Sales' and 'Service' are further expanded, showing various role assignment options like 'Contact Roles on Contracts' and 'Case Team Roles'. A search bar at the top left contains the text 'roles'. The main content area is titled 'Roles' and shows a hierarchical tree structure for the 'Vishnu Institute of Technology' organization. The tree starts with 'Vishnu Institute of Technology' and branches into various roles, each with an 'Add Role' link and action buttons (Edit, Del, Assign). The roles listed include CEO, CFO, COO, SVP Customer Service & Support, SVP Human Resources, SVP Sales & Marketing, VP International Sales, VP Marketing, Marketing Team, VP North American Sales, Director Channel Sales, Channel Sales Team, Director Direct Sales, Eastern Sales Team, Western Sales Team, Sales Representative, Sales Executive, Sales Manager, and Customer. The 'Add Role' link is highlighted for the 'Customer' role.

**Setup Roles**

**Roles**

[Collapse All](#) [Expand All](#)

- Vishnu Institute of Technology**
  - [Add Role](#)
  - CEO** [Edit](#) | [Del](#) | [Assign](#)
    - [Add Role](#)
  - CFO** [Edit](#) | [Del](#) | [Assign](#)
    - [Add Role](#)
  - COO** [Edit](#) | [Del](#) | [Assign](#)
    - [Add Role](#)
  - SVP Customer Service & Support** [Edit](#) | [Del](#) | [Assign](#)
    - [Add Role](#)
    - Customer Support, International** [Edit](#) | [Del](#) | [Assign](#)
      - [Add Role](#)
    - Customer Support, North America** [Edit](#) | [Del](#) | [Assign](#)
      - [Add Role](#)
    - Installation & Repair Services** [Edit](#) | [Del](#) | [Assign](#)
      - [Add Role](#)
  - SVP Human Resources** [Edit](#) | [Del](#) | [Assign](#)
    - [Add Role](#)
  - SVP Sales & Marketing** [Edit](#) | [Del](#) | [Assign](#)
    - [Add Role](#)
    - VP International Sales** [Edit](#) | [Del](#) | [Assign](#)
      - [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](#)

## 5. Create a Property Details App

### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

#### App Details

\* App Name ⓘ

Property Details

\* Developer Name ⓘ

Property\_Details

Description ⓘ

Enter a description...

#### App Branding

Image ⓘ



[Clear](#)

Primary Color Hex Value ⓘ



Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

#### App Launcher Preview

← → ↺ vishnuinstituteoftechnol-4e-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02udM0000082ZrVQAU&retUrl=https%3A%2F%2Fvishn... ☆ ⬇️ ⓘ ⋮

⌵ | Gmail YouTube Maps

← Lightning App Builder ⚙️ App Settings 📄 Pages ▾ Property Details ? Help

#### App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

**Navigation Items**

User Profiles

#### Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

🔄 Create ▾

🔍 Type to filter list...

- 📁 Accounts
- 🏠 Activities
- 📄 All Sites
- 💳 Alternative Payment Methods
- 📊 Analytics
- 🚀 App Launcher

Selected Items

- 🏠 Home
- 🔍 Search your Property
- 👤 Customers
- 📄 Property

▶ ◀ ⬆ ⬇

## 6.Create Profiles (Manager and Consumer)

Q profile

Users

Profiles

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

SETUP

Profiles

Profile Edit

Save Save & New Cancel

Name

Manager

User License

Salesforce Platform

Custom Profile

✓

Description

Custom App Settings

! = Required Information

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	Property Details (Property_Details)	<input checked="" type="checkbox"/>	<input type="radio"/>
College Management App (Praneeth)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

SETUP

Profiles

Profile

Manager

Help for this Page ?

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 [0] | 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

Edit Clone Delete View Users

Name	Manager		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	Praneeth Pagadala, 26/10/2024, 2:27 pm	Modified By	Praneeth Pagadala, 26/10/2024, 2:30 pm

Page Layouts

Q profile

Users

Profiles

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

SETUP

Profiles

Profile Edit

Save Save & New Cancel

Name

Customer

User License

Salesforce Platform

Custom Profile


✓

Description

Custom App Settings

! = Required Information

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	Property Details (Property_Details)	<input checked="" type="checkbox"/>	<input type="radio"/>
College Management App (Praneeth)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>



SETUP

Profiles

Profile

Customer

Help for this Page

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 \[0\]](#) | 
 [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

Edit


Clone








Delete

View Users

Name	Customer		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Praneeth Pagadala, 26/10/2024, 2:21 pm	Modified By	Praneeth Pagadala, 26/10/2024, 2:27 pm

## 7. Create a Check Box field on user



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

User

Details

Fields & Relationships

User Page Layouts

User Profile Page Layouts

Lightning Record Pages

Buttons and Links

Compact Layouts

Field Sets

Object Limits

Fields & Relationships

31+ Items, Sorted by Field Label

New

Deleted Fields

Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
About Me	AboutMe	Text Area(1000)		
Active	IsActive	Checkbox		<input checked="" type="checkbox"/>
Address	Address	Address		
Admin Info Emails	ReceivesAdminInfoEmails	Checkbox		
Alias	Alias	Text(8)		<input checked="" type="checkbox"/>
Allow Forecasting	ForecastEnabled	Checkbox		
Banner Photo	BannerPhotoId	Lookup(Photo)		

## 8. Create Users

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

SETUP

Users

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00ddm000008wxf9uam.iecta9xxjeai@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Customer	cust	customer@cu.com	Customer	<input checked="" type="checkbox"/>	Customer
<input type="checkbox"/> Edit	Customer2	cust	customer2@cum.com	Customer	<input checked="" type="checkbox"/>	Customer
<input type="checkbox"/> Edit	Executive	exec	executive@exe.com	Sales Executive	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Manager	mana	manager@ma.com	Sales Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit	Pagadala, Praneeth	PPaga	praneeth@prani.sri		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User, Integration	integ	integration@00ddm000008wxf9uam.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity@00ddm000008wxf9uam.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

## 9. Create an Approval Process for Property Object

Setup

Home

Object Manager

approval process

Process Automation

Approval Processes

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

SETUP

Approval Processes

Approval Processes

Property: Property Approval

« Back to Approval Process List

Process Definition Detail

Edit

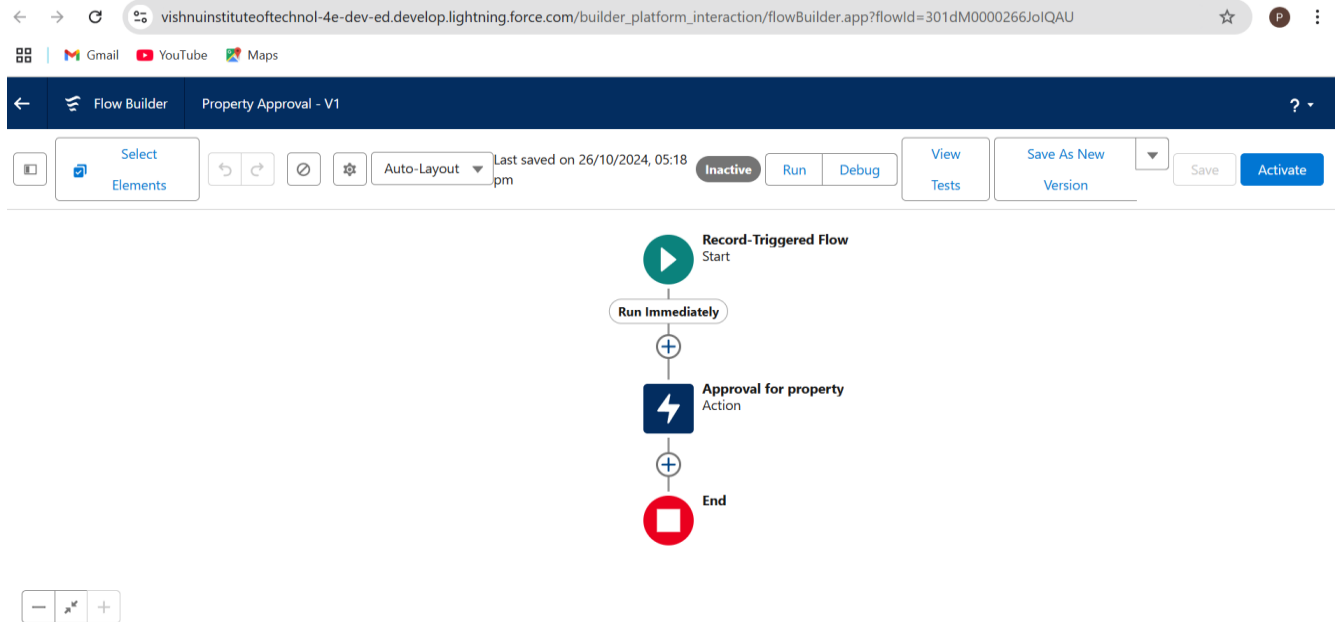
Clone

Deactivate

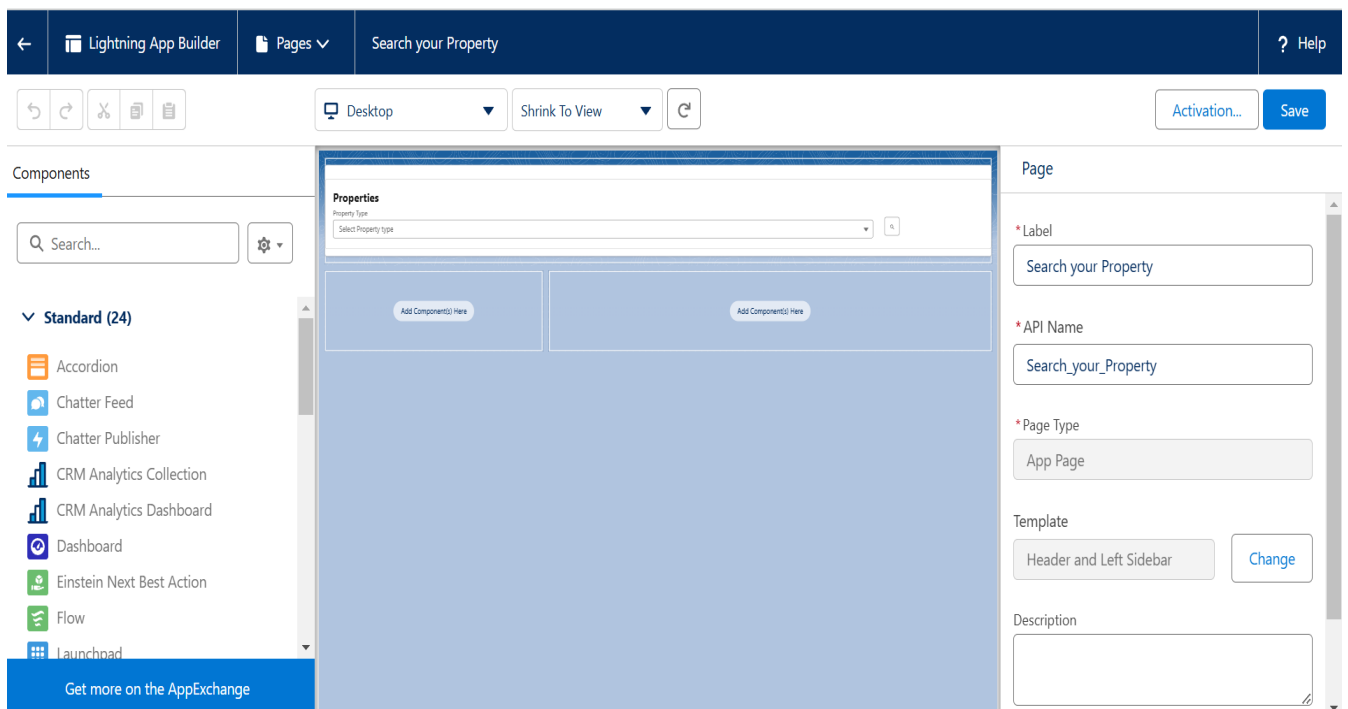
Process Name	Property Approval	Active	<input checked="" type="checkbox"/>
Unique Name	Property_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description	(Property: Location NOTEQUALTO blank) AND (Property: Verified EQUALS False)		
Entry Criteria	(Property: Location NOTEQUALTO blank) AND (Property: Verified EQUALS False)		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Property Owner, Role: Sales Manager		
Created By	Praneeth.Pagadala, 26/10/2024, 4:55 pm	Modified By	Praneeth.Pagadala, 26/10/2024, 5:09 pm



## 10. Create a Record trigger flow to submit the Approval Process Automatically.



## 11. Create an App Page



## 12. Create a LWC Component

VS Code interface showing the creation of a Lightning Web Component (LWC) named `propertyHandler`. The Explorer panel on the left shows the project structure, with the `propertyHandler` folder expanded. The main editor displays the `propertyHandler.html` template, which includes a `lightning-card` and two `div` elements. The first `div` contains a heading `Properties`. The second `div` contains a `lightning-combobox` with a label "Property Type" and a placeholder "Select Property type". The Output panel at the bottom shows the successful creation of the component bundle and meta-file.

```
<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>
      <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>
        </div>
      </div>
    </div>
  </template>
```

Output:

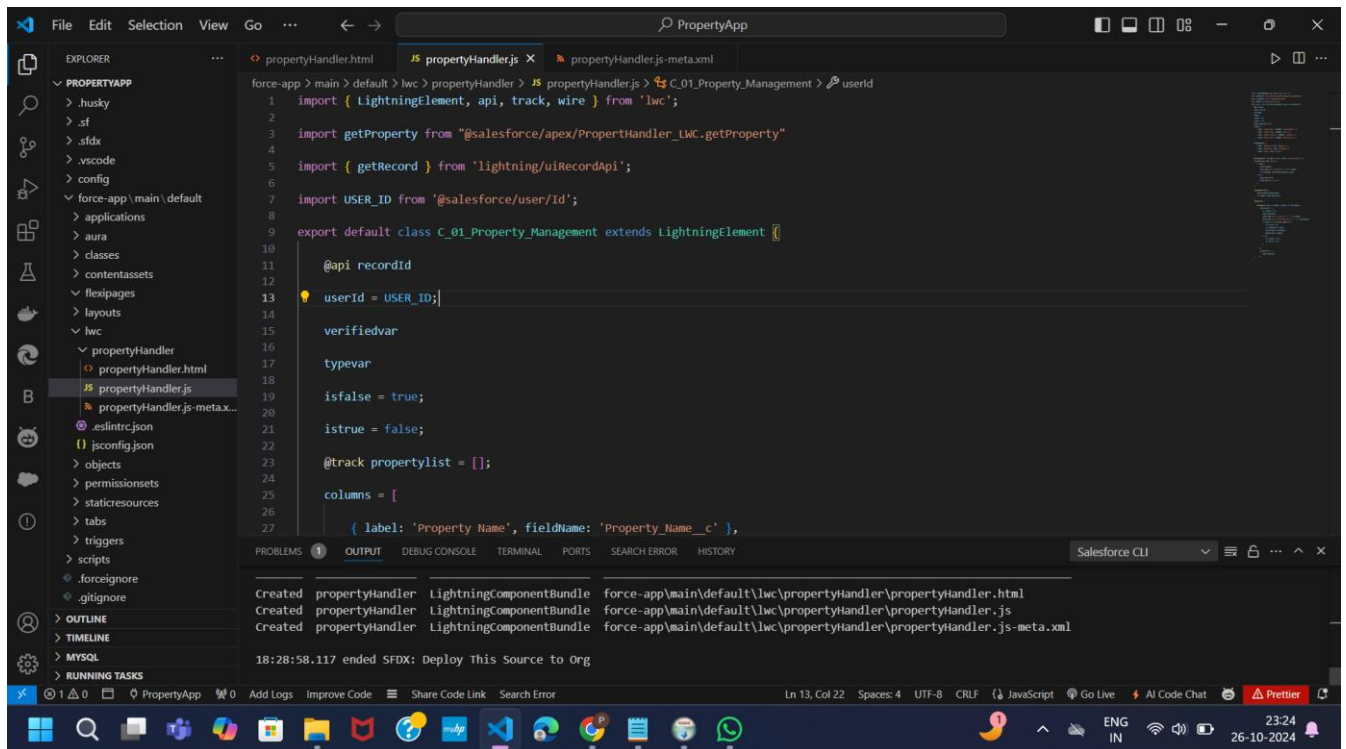
```
Created propertyHandler LightningComponentBundle force-app\main\default\lwc\propertyHandler\propertyHandler.html
Created propertyHandler LightningComponentBundle force-app\main\default\lwc\propertyHandler\propertyHandler.js
Created propertyHandler LightningComponentBundle force-app\main\default\lwc\propertyHandler\propertyHandler.js-meta.xml
```

VS Code interface showing the `propertyHandler.js-meta.xml` file. The Explorer panel on the left shows the project structure, with the `propertyHandler` folder expanded. The main editor displays the `propertyHandler.js-meta.xml` file, which includes the `LightningComponentBundle` definition and targets. The Output panel at the bottom shows the successful creation of the component bundle and meta-file.

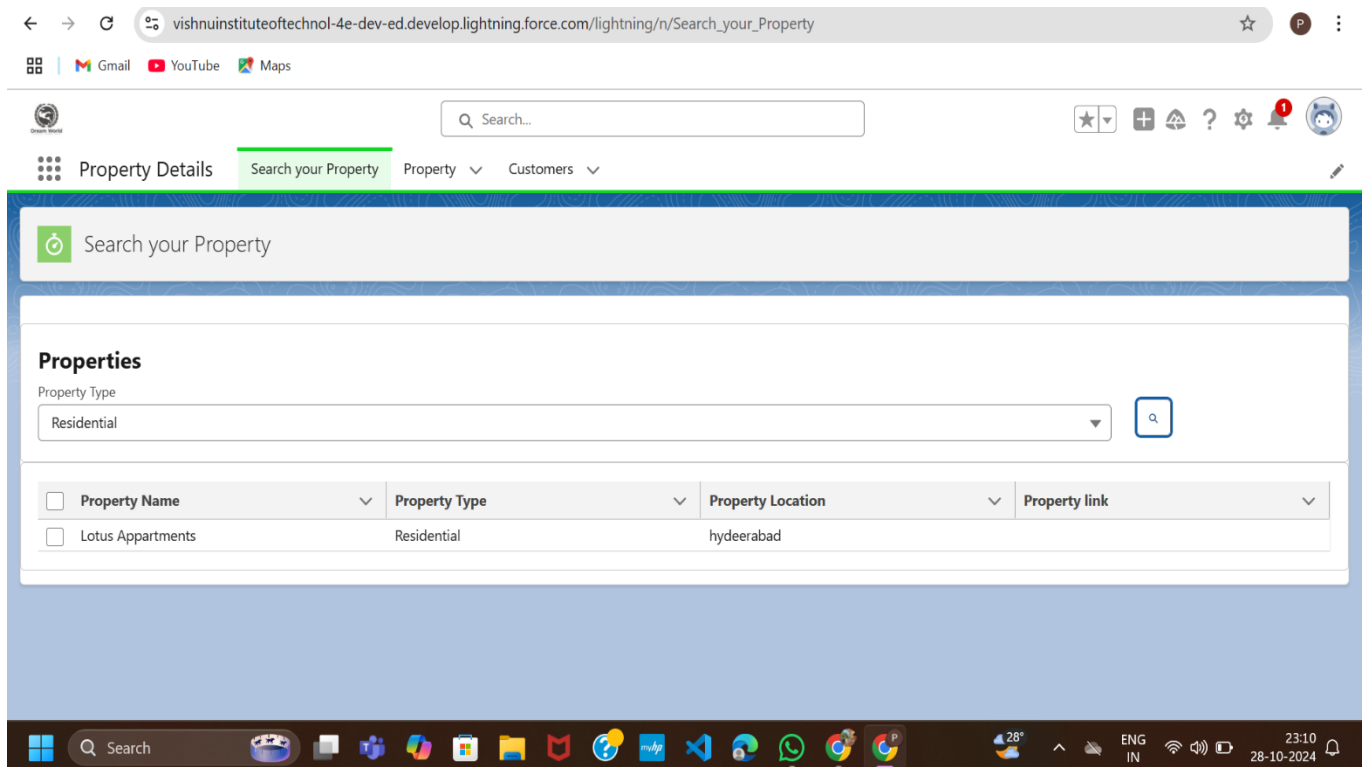
```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
  <apiVersion>59.0</apiVersion>
  <isExposed>true</isExposed>
  <targets>
    <target>lightning__RecordPage</target>
    <target>lightning__AppPage</target>
    <target>lightning__HomePage</target>
  </targets>
</LightningComponentBundle>
```

Output:


```
Created propertyHandler LightningComponentBundle force-app\main\default\lwc\propertyHandler\propertyHandler.html
Created propertyHandler LightningComponentBundle force-app\main\default\lwc\propertyHandler\propertyHandler.js
Created propertyHandler LightningComponentBundle force-app\main\default\lwc\propertyHandler\propertyHandler.js-meta.xml
```



### 13. Drag this Component to your App Page



# 14. Give Access of Apex Classes to Profiles

 **Apex Classes**

Apex Class

ProperHandler\_LWC

Help for this Page

Apex Class Detail

Edit

Delete

Download

Security

Show Dependencies

Name	ProperHandler_LWC	Status	Active
Namespace Prefix		Code Coverage	0% (0/2)
Created By	Praneeth Pagadala , 26/10/2024, 5:29 pm	Last Modified By	Praneeth Pagadala , 26/10/2024, 5:34 pm

Class Body

Class Summary

Version Settings

Trace Flags

1

2

3

4

5

6

7

8

9

10

11

12

```
public class ProperHandler_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];
    }
}
```