Project Title: A CRM Application to Handle Clients and Their Property-Related Requirements

1. Project Overview

This project focuses on developing a Salesforce-based CRM application designed to manage clients and their property-related requirements. The primary objective is tostreamline business operations, improve customer relationship management, and optimize property management processes. By leveraging Salesforce's capabilities, we aim to enhance operational efficiency, provide a seamless user experience, and ensure accurate data management. This project supports long-term goals such as increasing market reach, improving customer satisfaction, and enabling data-driven decision-making for property-related businesses.

2. Objectives

Business Goals:

● Streamline client and property management processes.
● Enhance customer relationship management by providing detailed insights into client interactions.
● Improve property tracking and transaction efficiency.
● Facilitate seamless communication between property managers, sales teams, and clients.
● Increase overall operational transparency and efficiency.

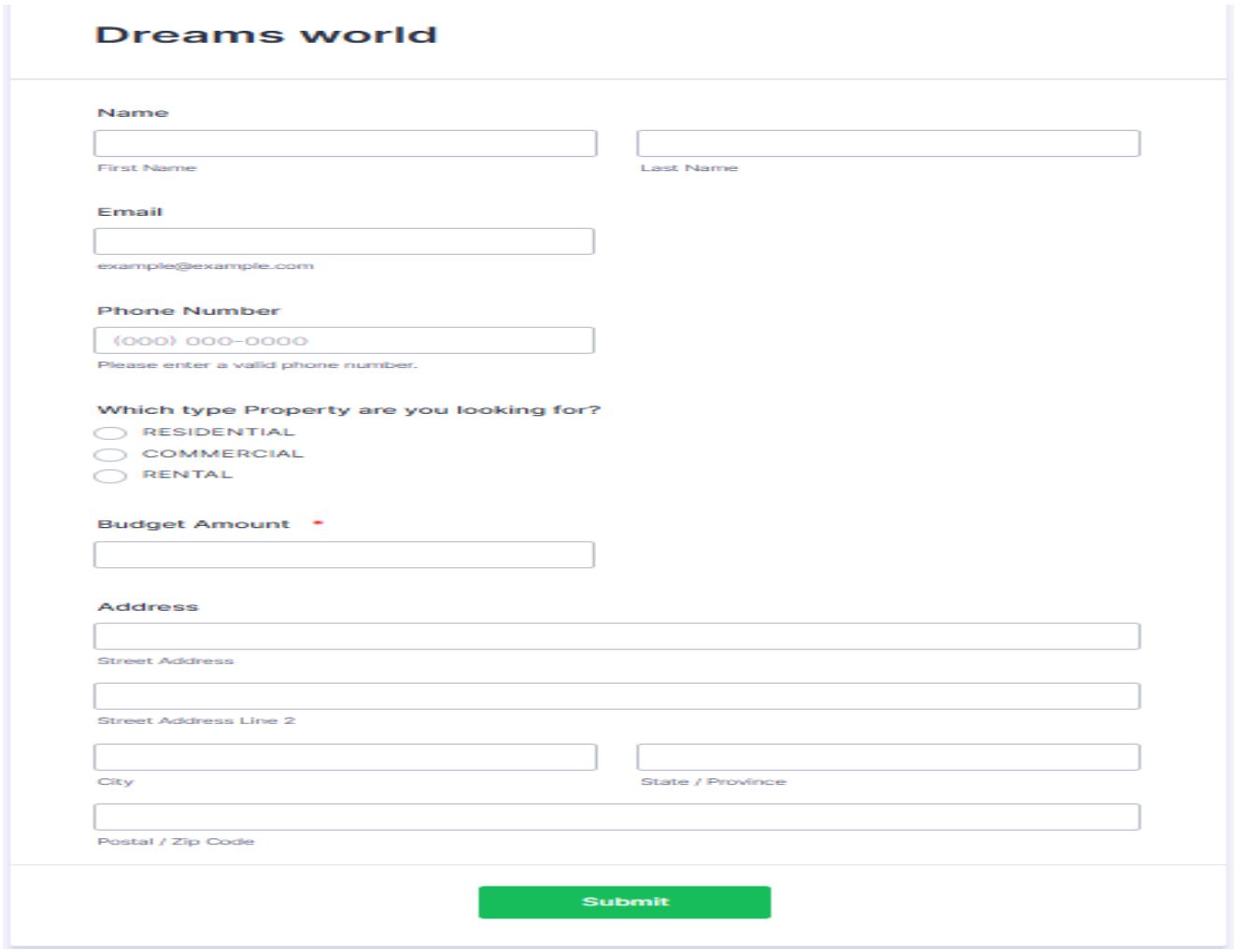
Specific Outcomes

● Develop a centralized database for managing client information, property listings, and transactions.
● Create custom Salesforce workflows to automate routine tasks like follow-ups and notifications.
● Implement dashboards and reports for real-time analytics.
● Enable mobile access for on-the-go CRM functionalities.

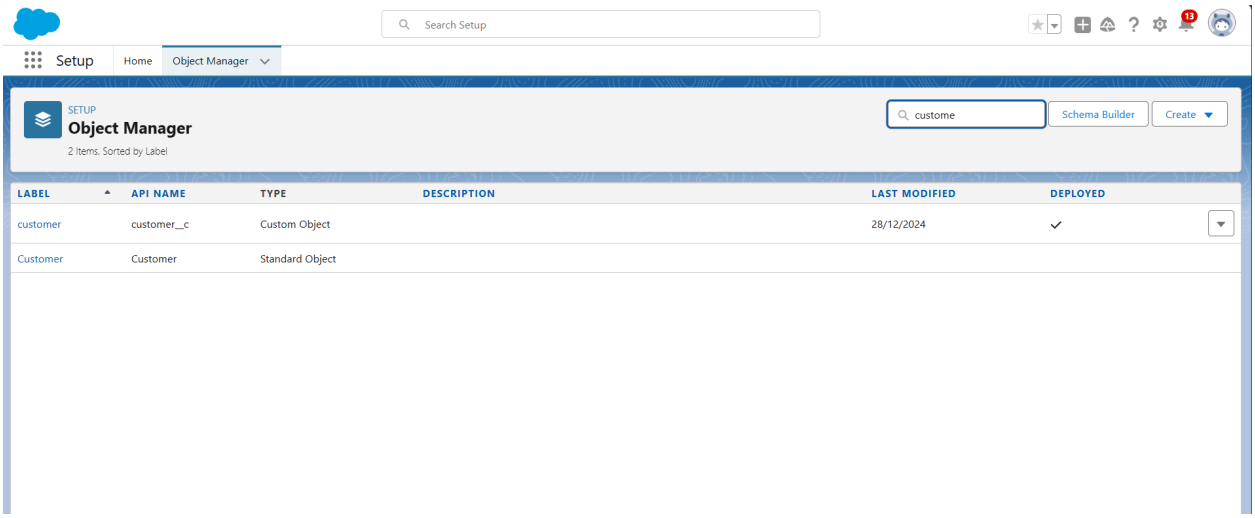
3. Salesforce Key Features and Concepts Utilized

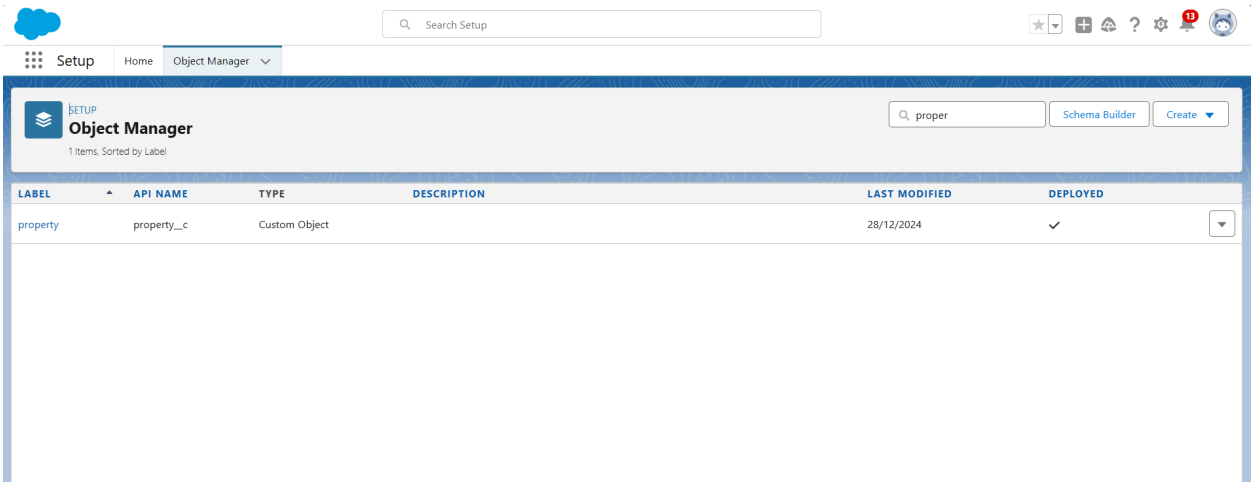
Sales Cloud: To manage leads, opportunities, and sales pipelines for property transactions.
Custom Objects: For managing property listings, transactions, and client details.

Form

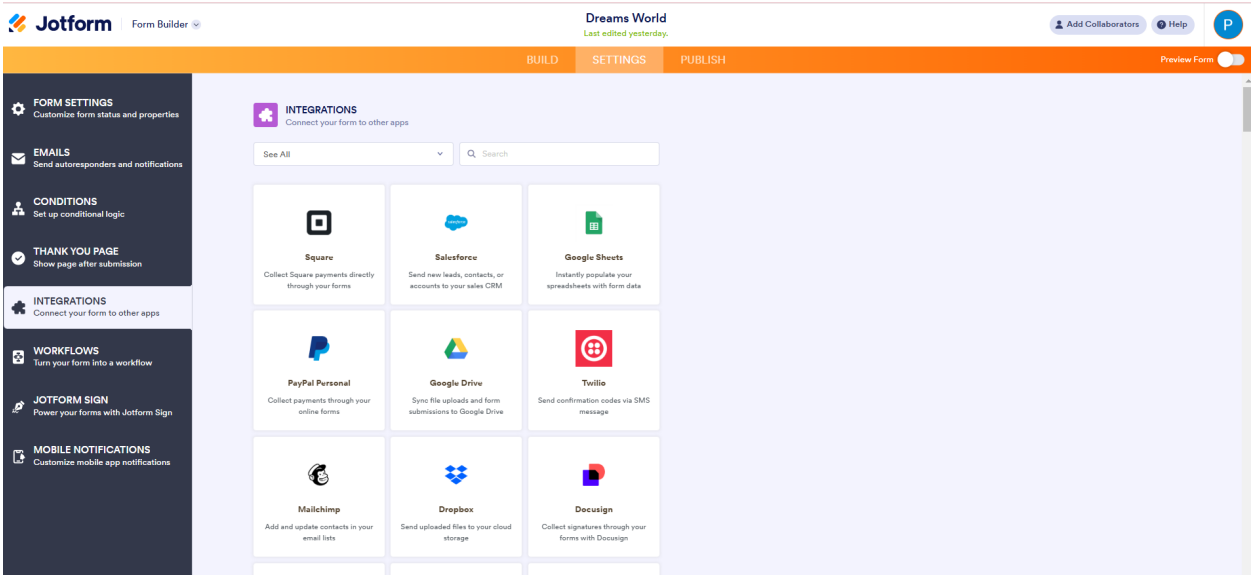

Dreams world
Name
First Name
Last Name
Email
example@example.com
Phone Number
(000) 000-0000
Please enter a valid phone number.
Which type Property are you looking for?
RESIDENTIAL
COMMERCIAL
RENTAL
Budget Amount
Address
Street Address
Street Address Line 2
City
State / Province
Postal / Zip Code
Submit

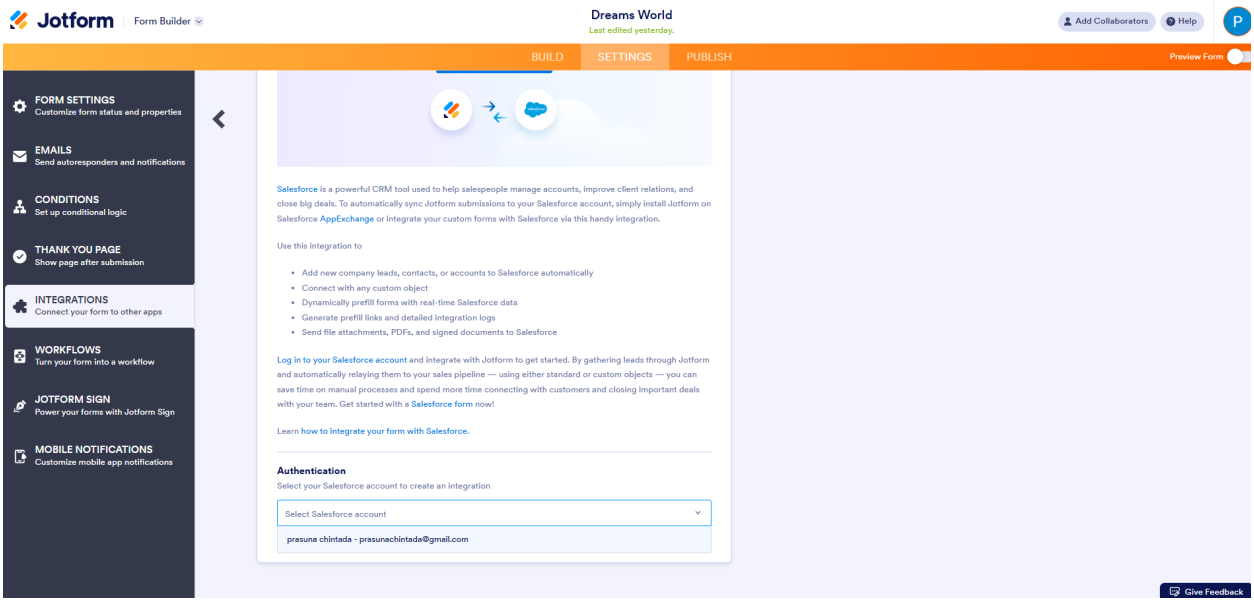
Objects

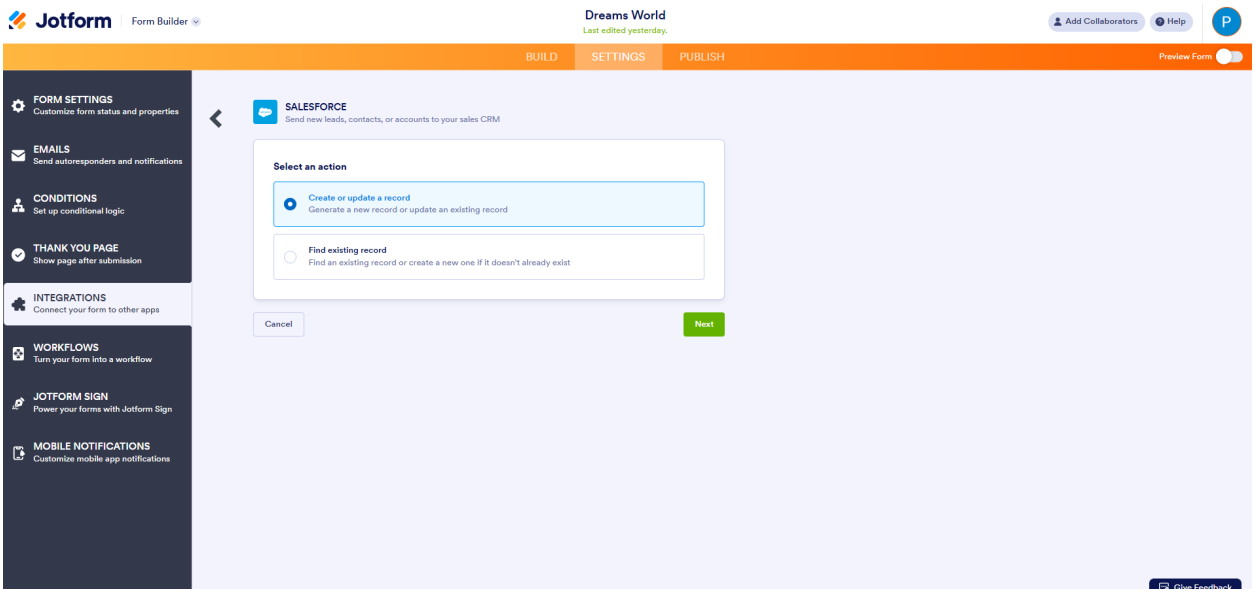

Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
2 Items, Sorted by Label
custome
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
customer
customer__c
Custom Object
28/12/2024
Customer
Customer
Standard Object

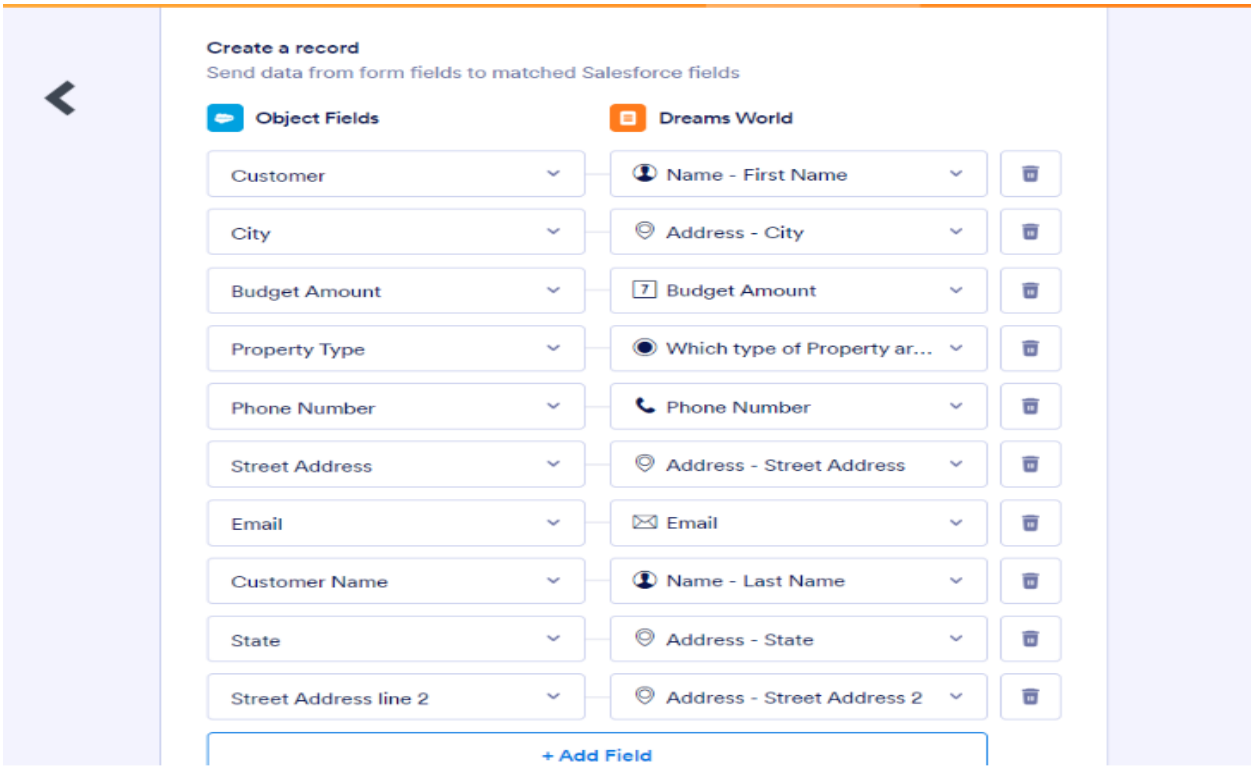


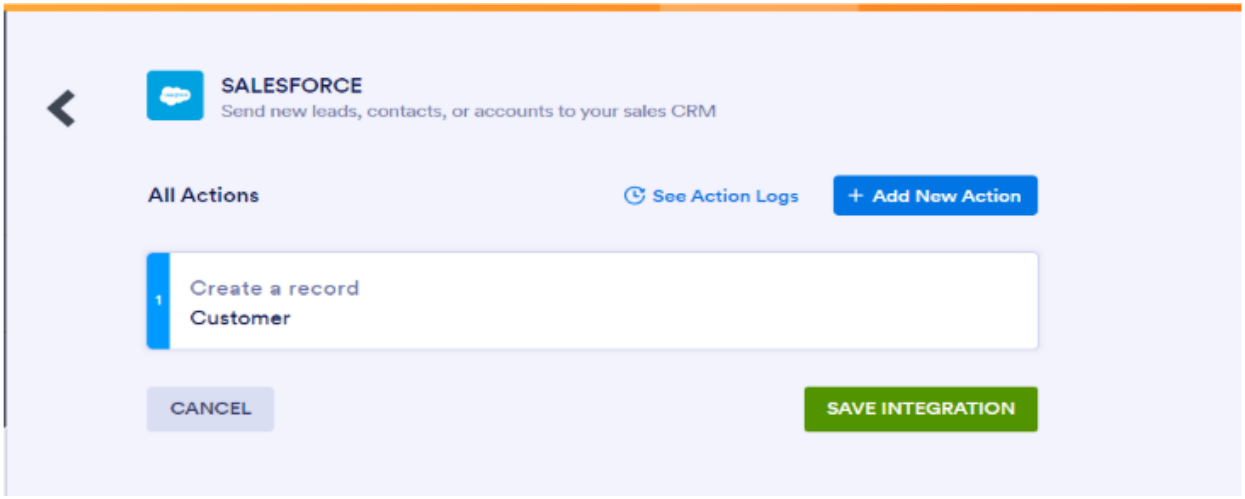
jot platform



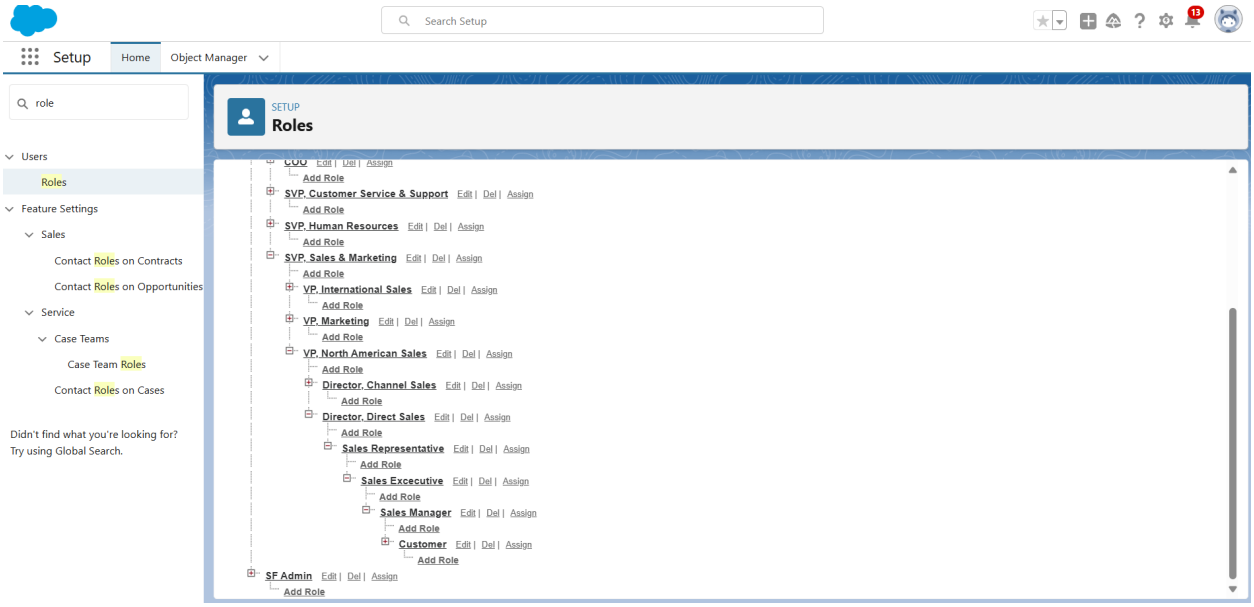

Jotform
Form Builder
Dreams World
Last edited yesterday.
Add Collaborators
Help
P
BUILD
SETTINGS
PUBLISH
Preview Form
FORM SETTINGS
Customize form status and properties
EMAILS
Send autoresponders and notifications
CONDITIONS
Set up conditional logic
THANK YOU PAGE
Show page after submission
INTEGRATIONS
Connect your form to other apps
WORKFLOWS
Turn your form into a workflow
JOTFORM SIGN
Power your forms with Jotform Sign
MOBILE NOTIFICATIONS
Customize mobile app notifications
Salesforce is a powerful CRM tool used to help salespeople manage accounts, improve client relations, and close big deals. To automatically sync Jotform submissions to your Salesforce account, simply install Jotform on Salesforce AppExchange or integrate your custom forms with Salesforce via this handy integration.
Use this integration to
Add new company leads, contacts, or accounts to Salesforce automatically
Connect with any custom object
Dynamically prefill forms with real-time Salesforce data
Generate prefill links and detailed integration logs
Send file attachments, PDFs, and signed documents to Salesforce
Log in to your Salesforce account and integrate with Jotform to get started. By gathering leads through Jotform and automatically relaying them to your sales pipeline — using either standard or custom objects — you can save time on manual processes and spend more time connecting with customers and closing important deals with your team. Get started with a Salesforce form now!
Learn how to integrate your form with Salesforce.
Authentication
Select your Salesforce account to create an integration
Select Salesforce account
prasuna chintada - prasunachintada@gmail.com
Give Feedback

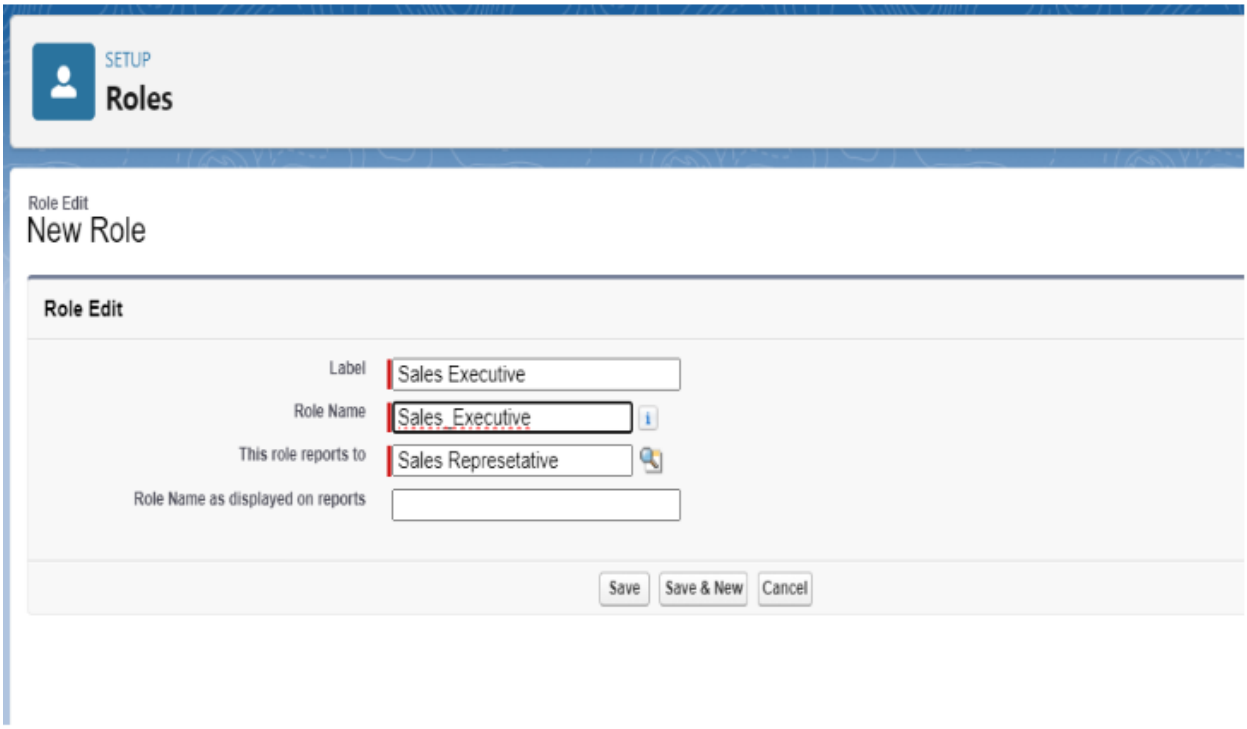

Jotform
Form Builder
Dreams World
Last edited yesterday.
Add Collaborators
Help
P
BUILD
SETTINGS
PUBLISH
Preview Form
FORM SETTINGS
Customize form status and properties
EMAILS
Send autoresponders and notifications
CONDITIONS
Set up conditional logic
THANK YOU PAGE
Show page after submission
INTEGRATIONS
Connect your form to other apps
WORKFLOWS
Turn your form into a workflow
JOTFORM SIGN
Power your forms with Jotform Sign
MOBILE NOTIFICATIONS
Customize mobile app notifications
SALESFORCE
Send new leads, contacts, or accounts to your sales CRM
Select an action
Create or update a record
Generate a new record or update an existing record
Find existing record
Find an existing record or create a new one if it doesn't already exist
Cancel
Next

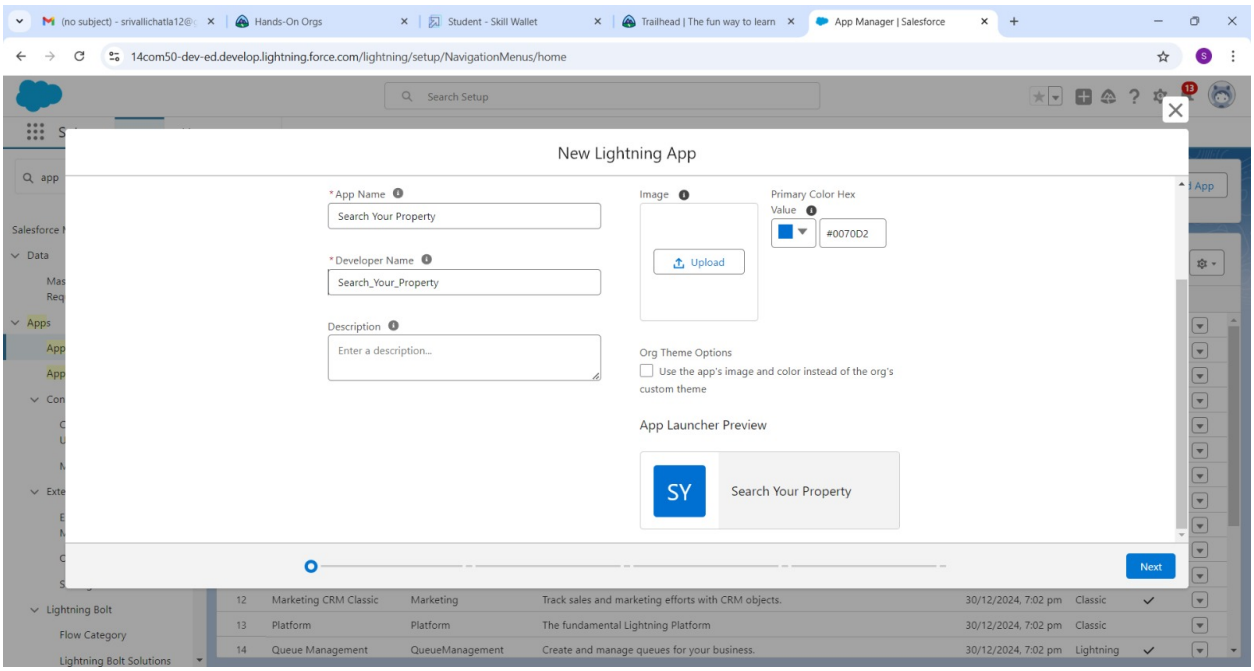

Create a record
Send data from form fields to matched Salesforce fields
Object Fields
Dreams World
Customer
Name - First Name
City
Address - City
Budget Amount
Budget Amount
Property Type
Which type of Property ar...
Phone Number
Phone Number
Street Address
Address - Street Address
Email
Email
Customer Name
Name - Last Name
State
Address - State
Street Address line 2
Address - Street Address 2
+ Add Field


SALESFORCE
Send new leads, contacts, or accounts to your sales CRM
All Actions
See Action Logs
+ Add New Action
1
Create a record
Customer
CANCEL
SAVE INTEGRATION

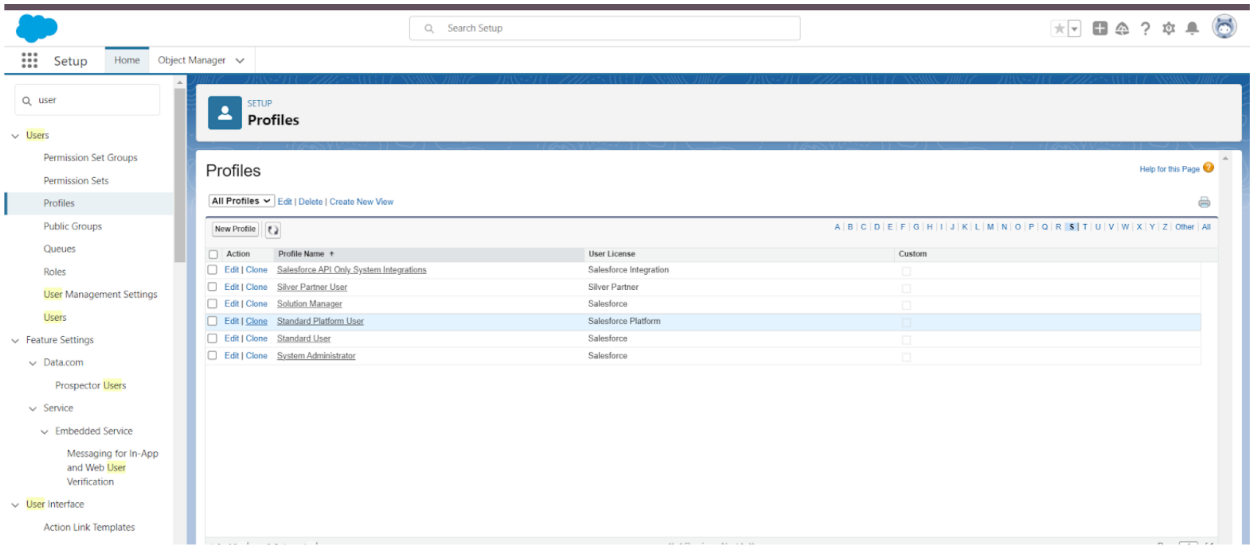
Roles

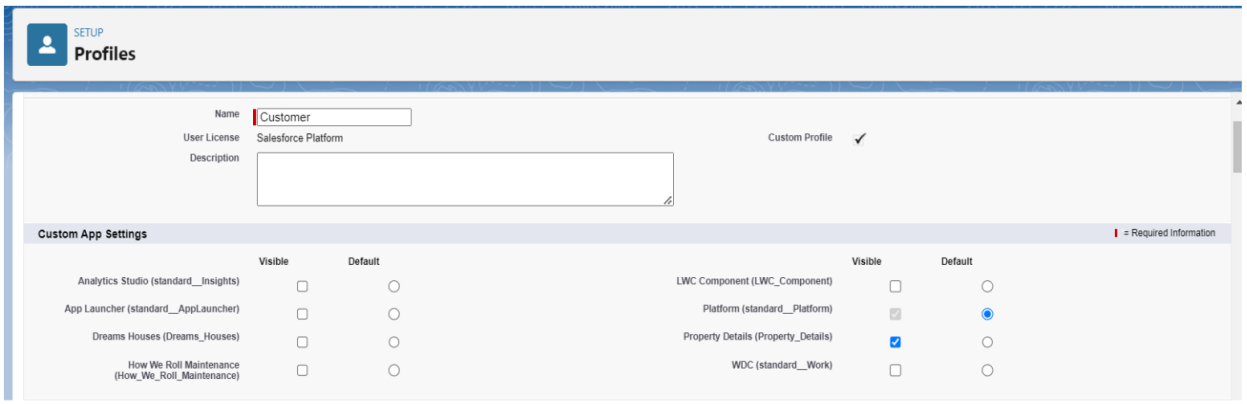

Search Setup
Setup
Home
Object Manager
role
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
COO Edit | Del | Assign
Add Role
SVP, Customer Service & Support 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
VP, North American Sales Edit | Del | Assign
Add Role
Director, Channel Sales Edit | Del | Assign
Add Role
Director, Direct Sales Edit | Del | Assign
Add Role
Sales Representative Edit | Del | Assign
Add Role
Sales Excecutive Edit | Del | Assign
Add Role
Sales Manager Edit | Del | Assign
Add Role
Customer Edit | Del | Assign
Add Role
SF Admin Edit | Del | Assign
Add Role

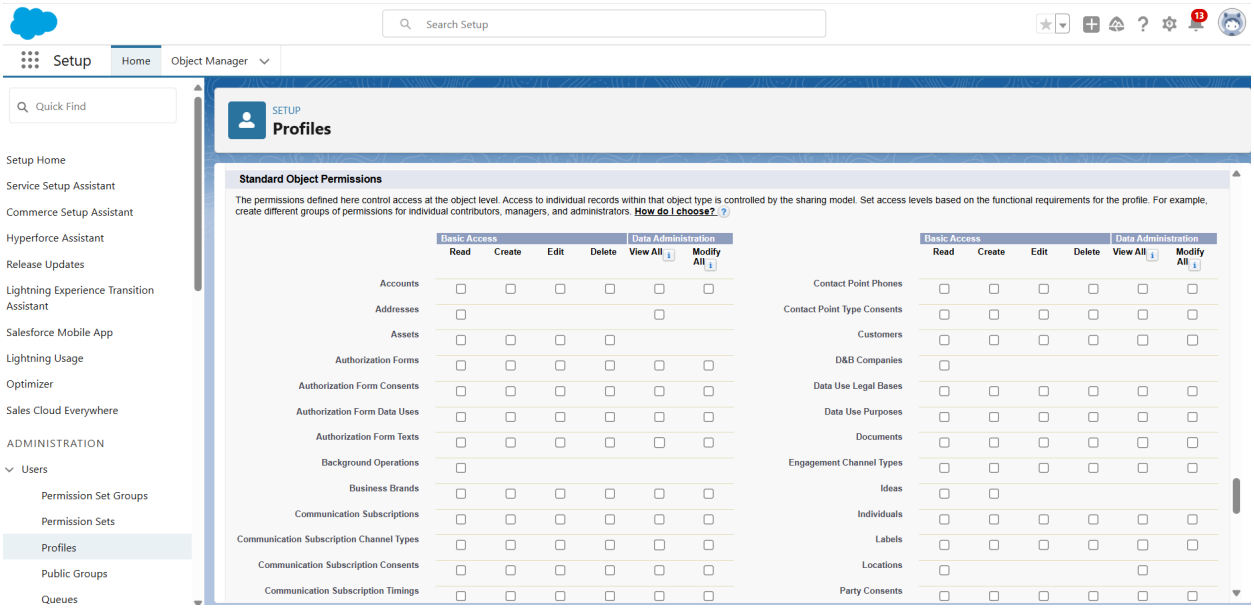

SETUP
Roles
Role Edit
New Role
Role Edit
Label
Sales Executive
Role Name
Sales_Executive
This role reports to
Sales Represetative
Role Name as displayed on reports
Save
Save & New
Cancel

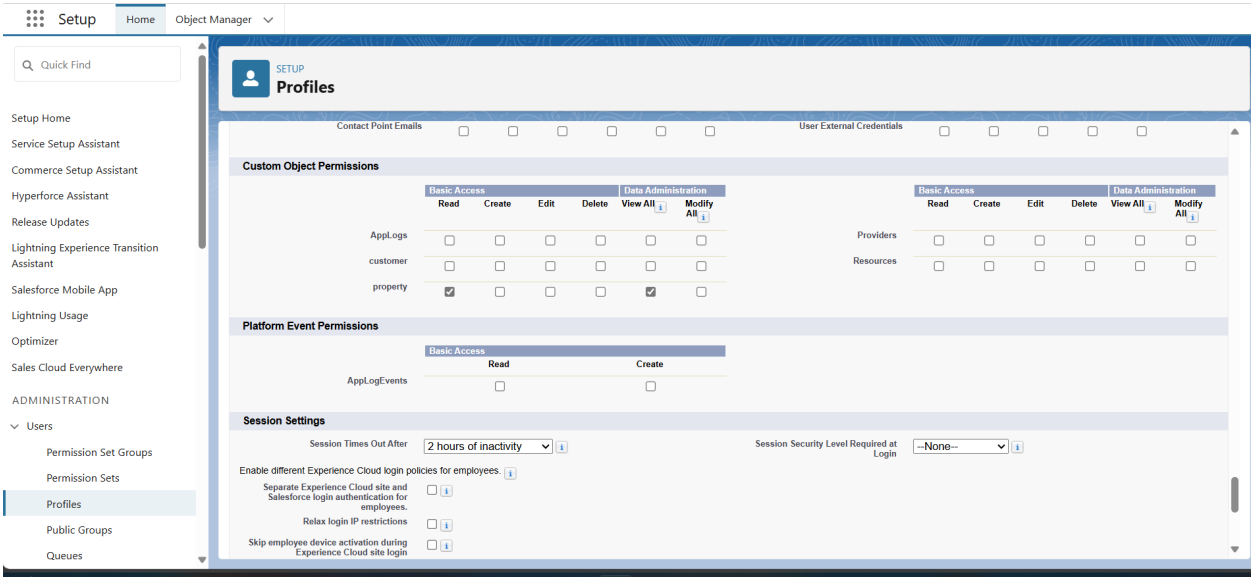

New Lightning App
*App Name
Search Your Property
*Developer Name
Search_Your_Property
Description
Enter a description...
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
SY
Search Your Property
Next

Profiles

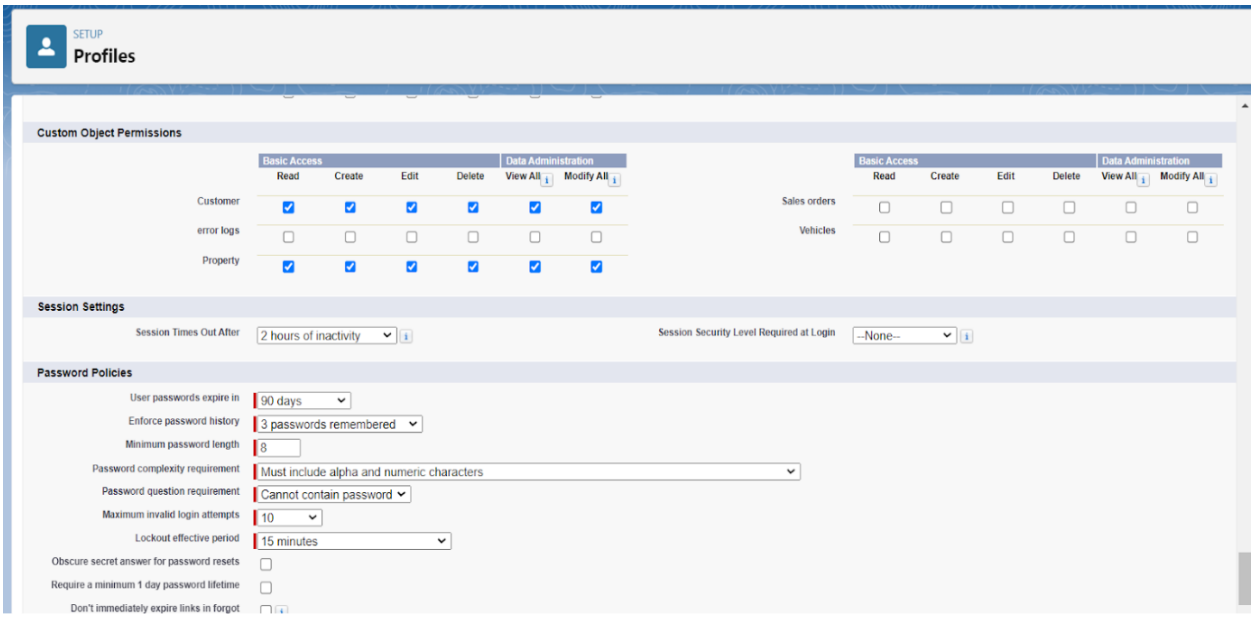

Setup
Home
Object Manager
Profiles
All Profiles
New Profile
Action
Profile Name
User License
Custom
Edit | Clone | Salesforce API Only System Integrations | Salesforce Integration
Edit | Clone | Silver Partner User | Silver Partner
Edit | Clone | Solution Manager | Salesforce
Edit | Clone | Standard Platform User | Salesforce Platform
Edit | Clone | Standard User | Salesforce
Edit | Clone | System Administrator | Salesforce


SETUP
Profiles
Name
Customer
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Dreams Houses (Dreams_Houses)
How We Roll Maintenance (How_We_Roll_Maintenance)
LWC Component (LWC_Component)
Platform (standard__Platform)
Property Details (Property_Details)
WDC (standard__Work)

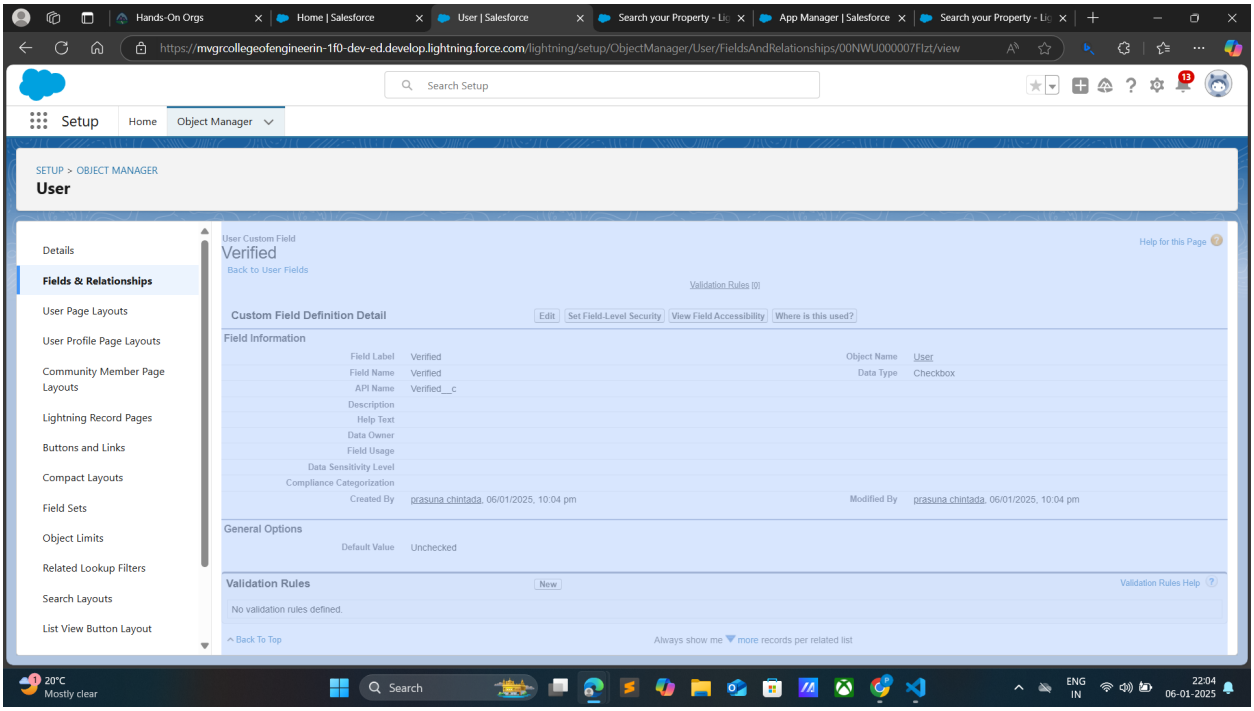

Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
SETUP
Profiles
Standard Object Permissions
The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. How do I choose?
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Accounts
Addresses
Assets
Authorization Forms
Authorization Form Consents
Authorization Form Data Uses
Authorization Form Texts
Background Operations
Business Brands
Communication Subscriptions
Communication Subscription Channel Types
Communication Subscription Consents
Communication Subscription Timings
Contact Point Phones
Contact Point Type Consents
Customers
D&B Companies
Data Use Legal Bases
Data Use Purposes
Documents
Engagement Channel Types
Ideas
Individuals
Labels
Locations
Party Consents


Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
SETUP
Profiles
Contact Point Emails
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
AppLogs
customer
property
Providers
Resources
Platform Event Permissions
AppLogEvents
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Enable different Experience Cloud login policies for employees.
Separate Experience Cloud site and Salesforce login authentication for employees.
Relax login IP restrictions
Skip employee device activation during Experience Cloud site login

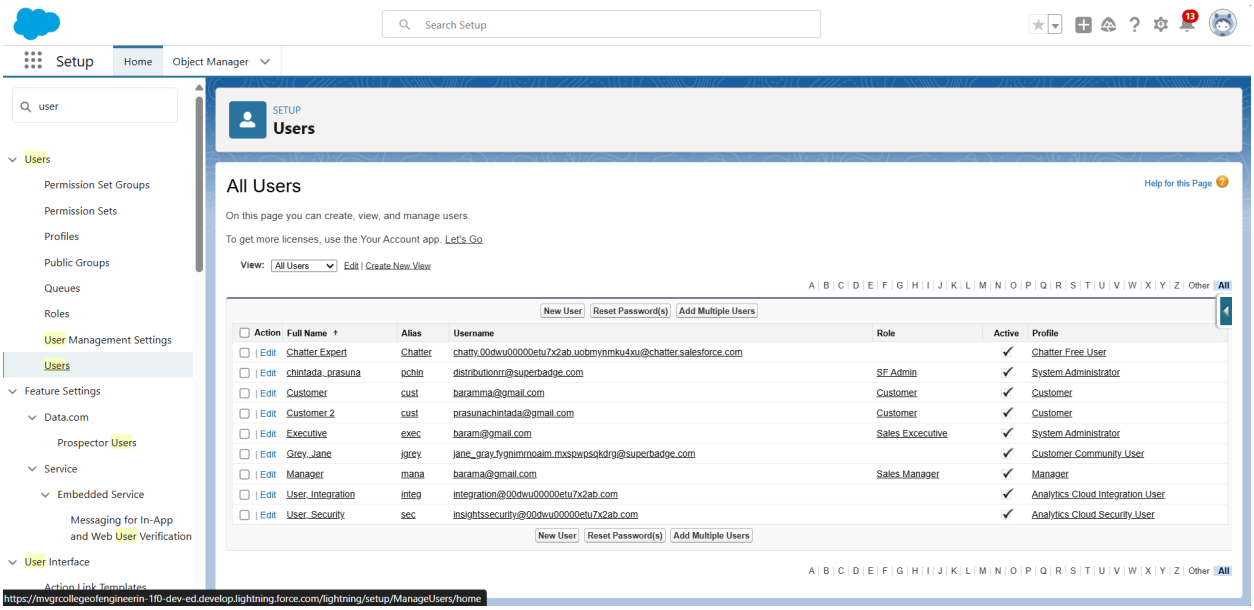
Manager



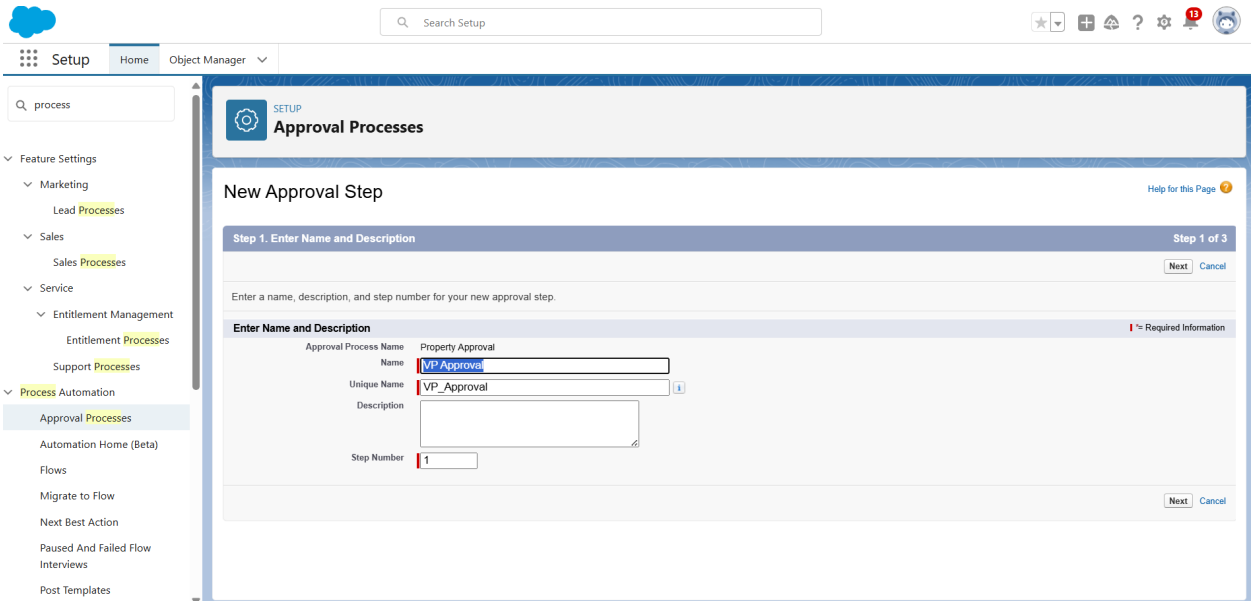
activity



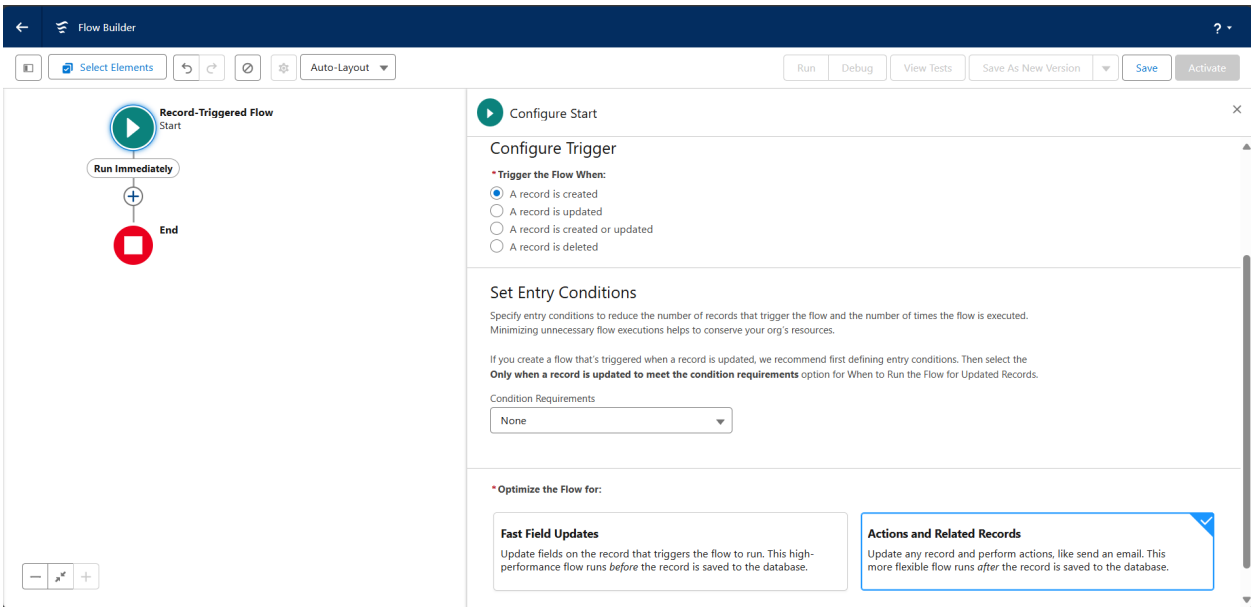
users

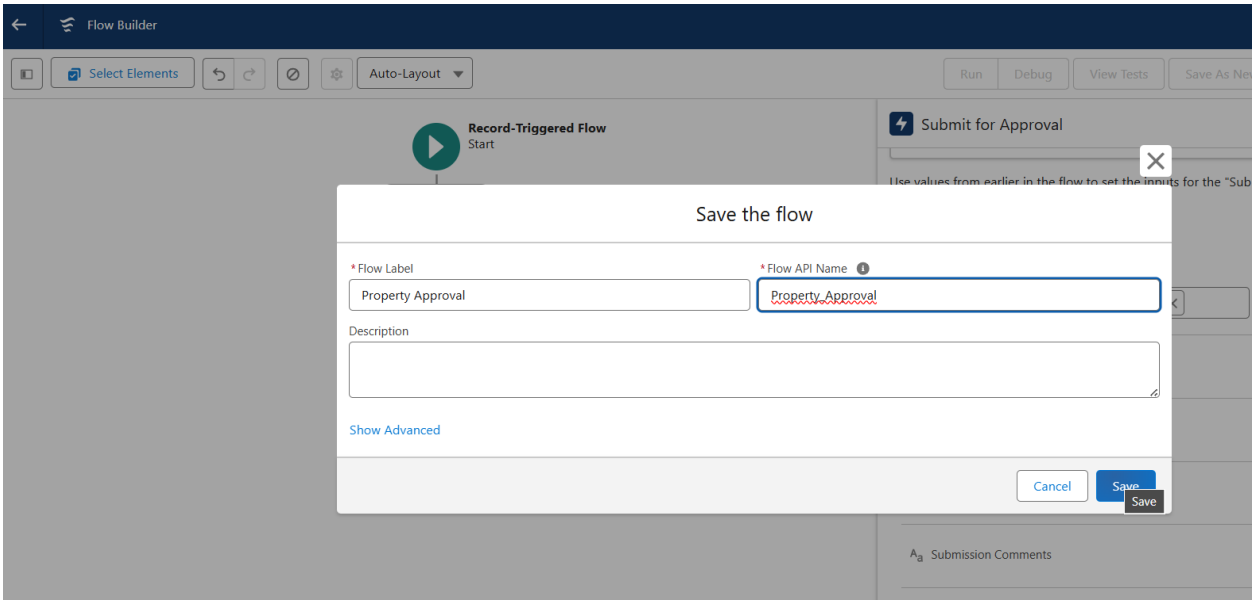


activity

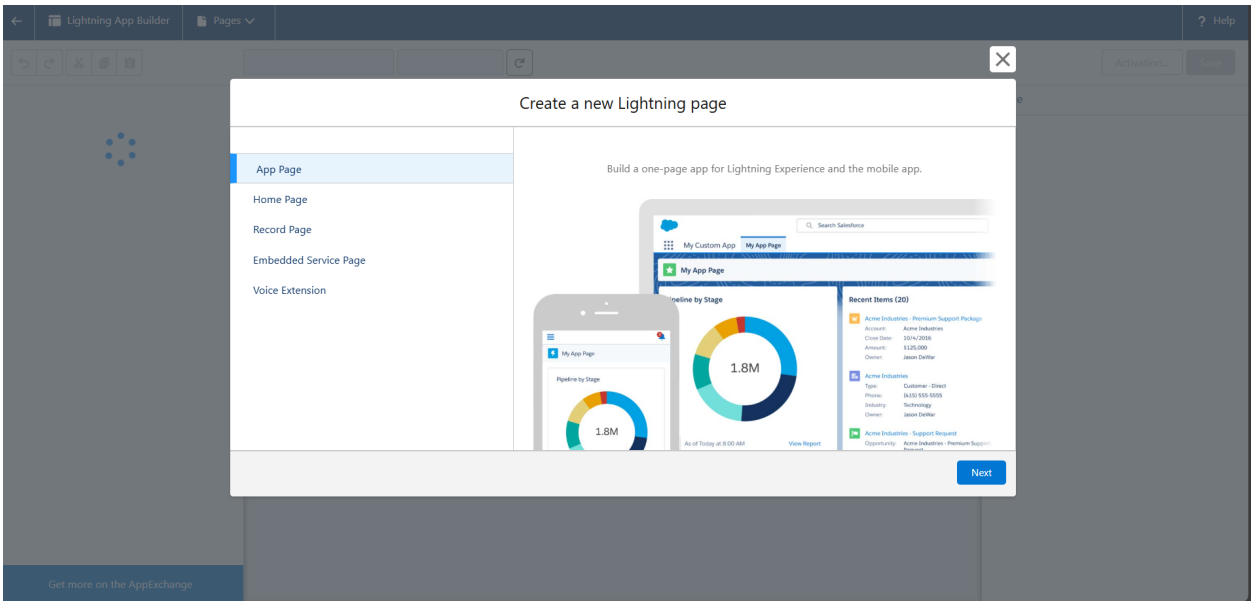


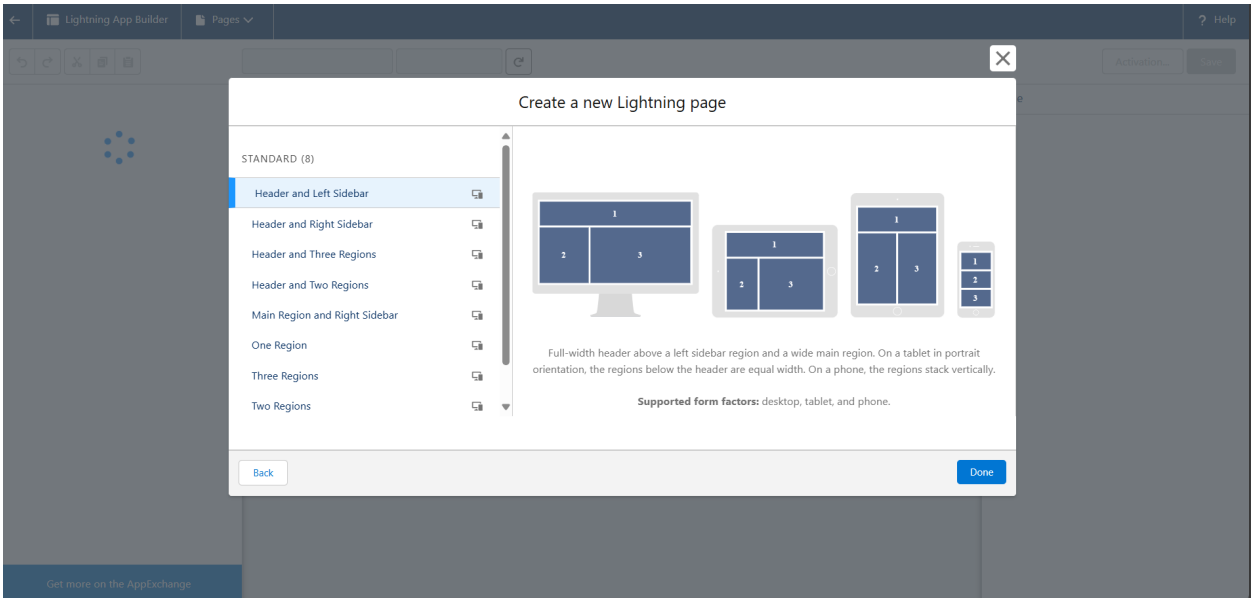
activity

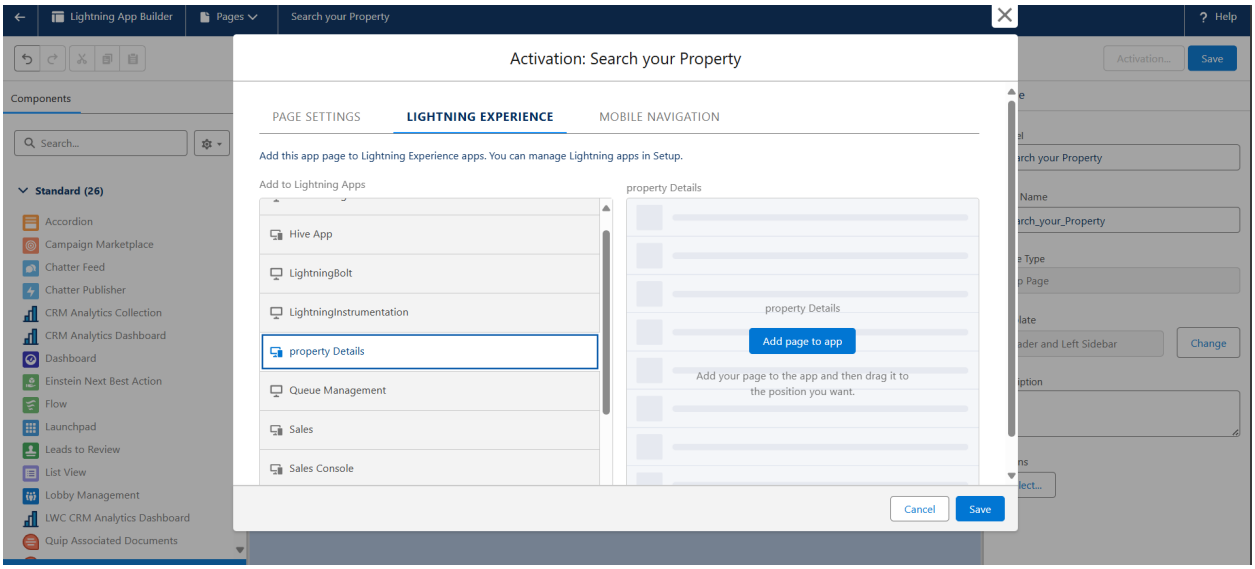

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Record-Triggered Flow
Start
Run Immediately
End
Configure Start
Configure Trigger
*Trigger the Flow When:
A record is created
A record is updated
A record is created or updated
A record is deleted
Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed.
Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the
Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.
Condition Requirements
None
*Optimize the Flow for:
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.
Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.


Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Record-Triggered Flow
Start
Submit for Approval
Save the flow
* Flow Label
Property Approval
* Flow API Name
Property_Approval
Description
Show Advanced
Cancel
Save
Save
Submission Comments

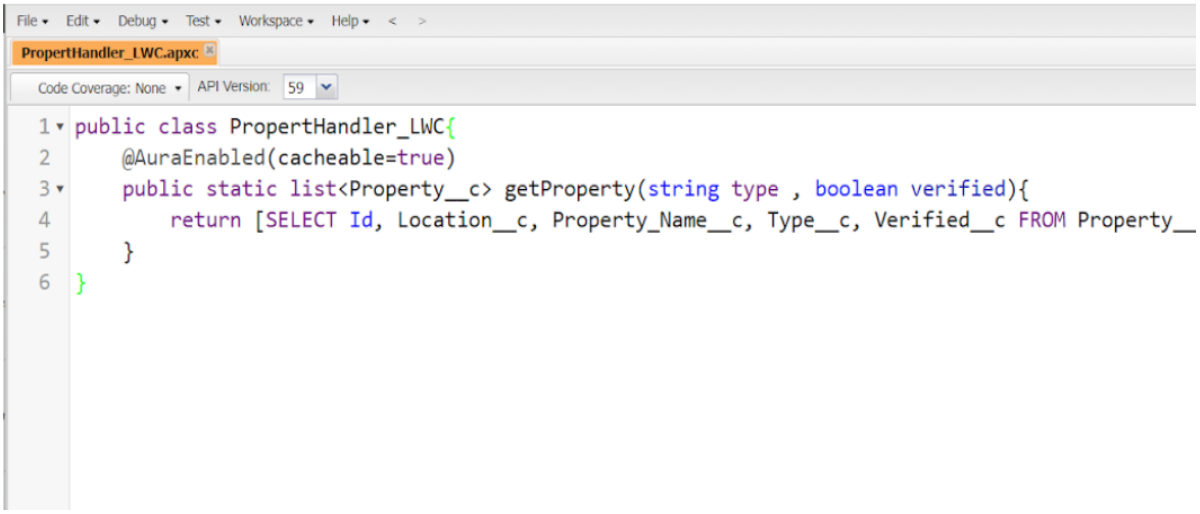
activity

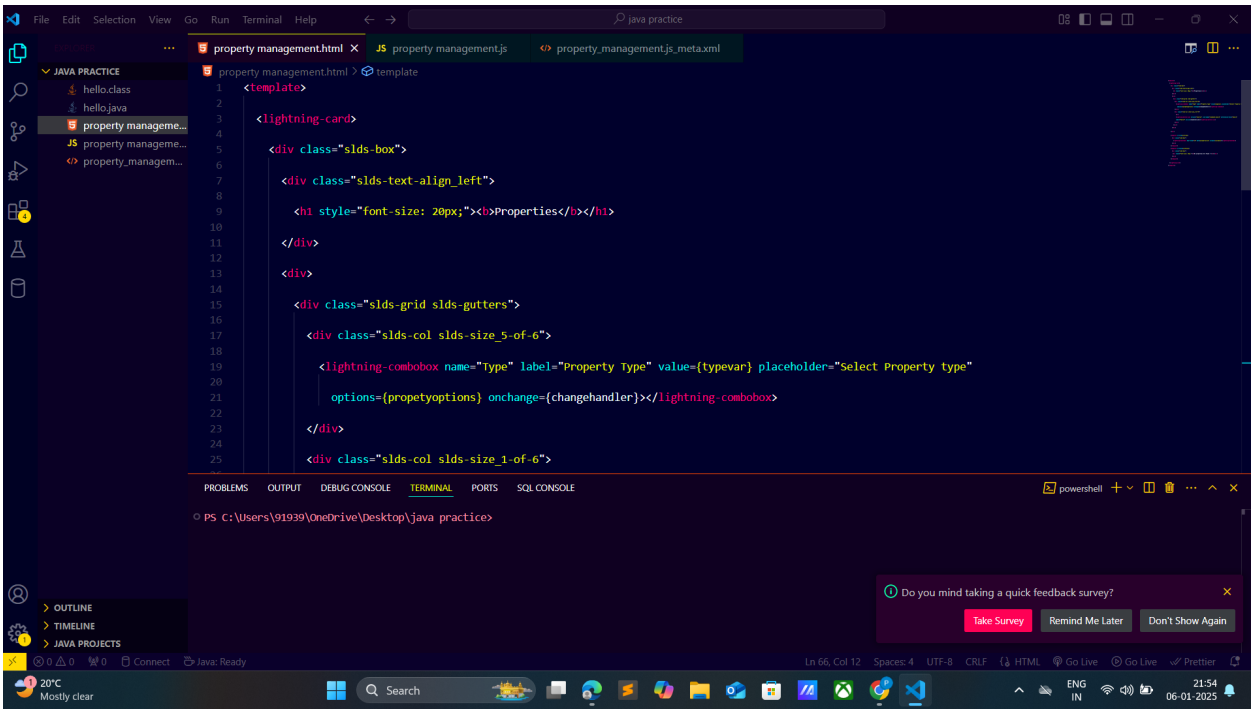

Lightning App Builder
Pages
Help
Create a new Lightning page
App Page
Home Page
Record Page
Embedded Service Page
Voice Extension
Build a one-page app for Lightning Experience and the mobile app.
Next
Get more on the AppExchange


Lightning App Builder
Pages
Help
Create a new Lightning page
STANDARD (8)
Header and Left Sidebar
Header and Right Sidebar
Header and Three Regions
Header and Two Regions
Main Region and Right Sidebar
One Region
Three Regions
Two Regions
Full-width header above a left sidebar region and a wide main region. On a tablet in portrait orientation, the regions below the header are equal width. On a phone, the regions stack vertically.
Supported form factors: desktop, tablet, and phone.
Back
Done
Get more on the AppExchange


Lightning App Builder
Pages
Search your Property
Help
Activation: Search your Property
Components
Search...
Standard (26)
Accordion
Campaign Marketplace
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Einstein Next Best Action
Flow
Launchpad
Leads to Review
List View
Lobby Management
LWC CRM Analytics Dashboard
Quip Associated Documents
PAGE SETTINGS
LIGHTNING EXPERIENCE
MOBILE NAVIGATION
Add this app page to Lightning Experience apps. You can manage Lightning apps in Setup.
Add to Lightning Apps
Hive App
LightningBolt
LightningInstrumentation
property Details
Queue Management
Sales
Sales Console
property Details
Add page to app
Add your page to the app and then drag it to the position you want.
Cancel
Save
Activation...
Save
Change

activity

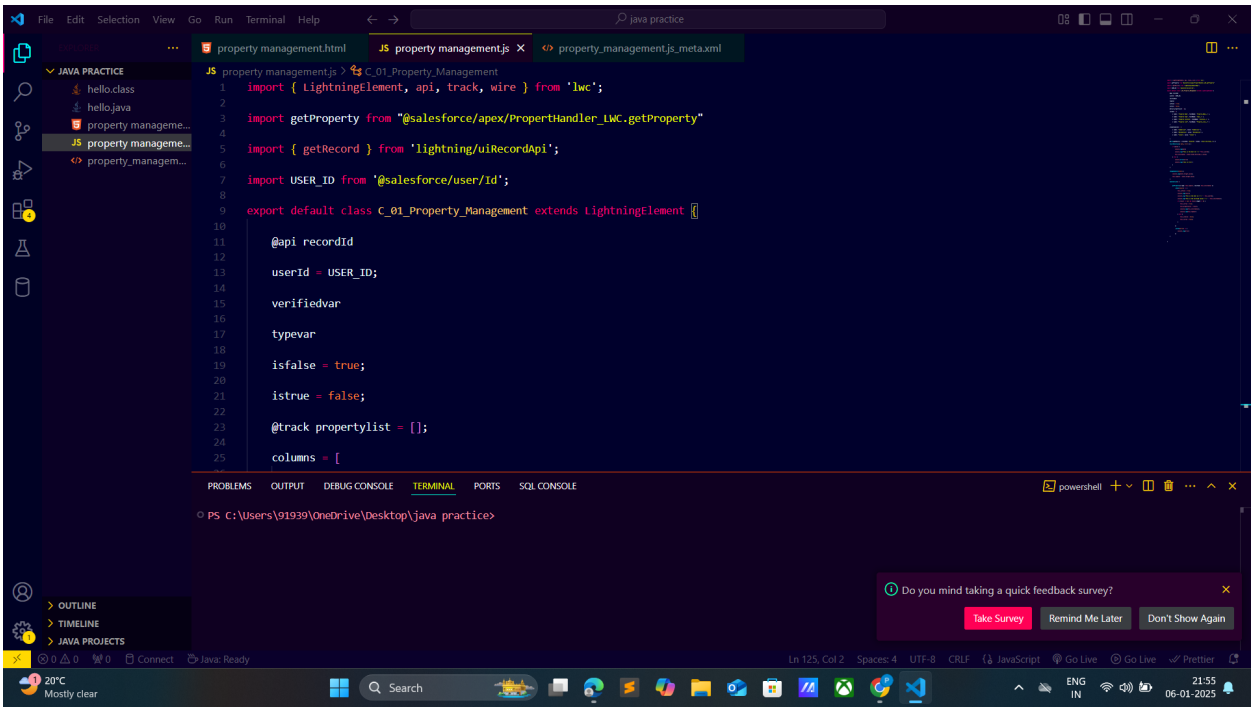

File
Edit
Debug
Test
Workspace
Help
PropertHandler_LWC.apxc
Code Coverage: None
API Version:
59
1 public class PropertHandler_LWC{
2 @AuraEnabled(cacheable=true)
3 public static list<Property__c> getProperty(string type , boolean verified){
4 return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM Property__
5 }
6 }

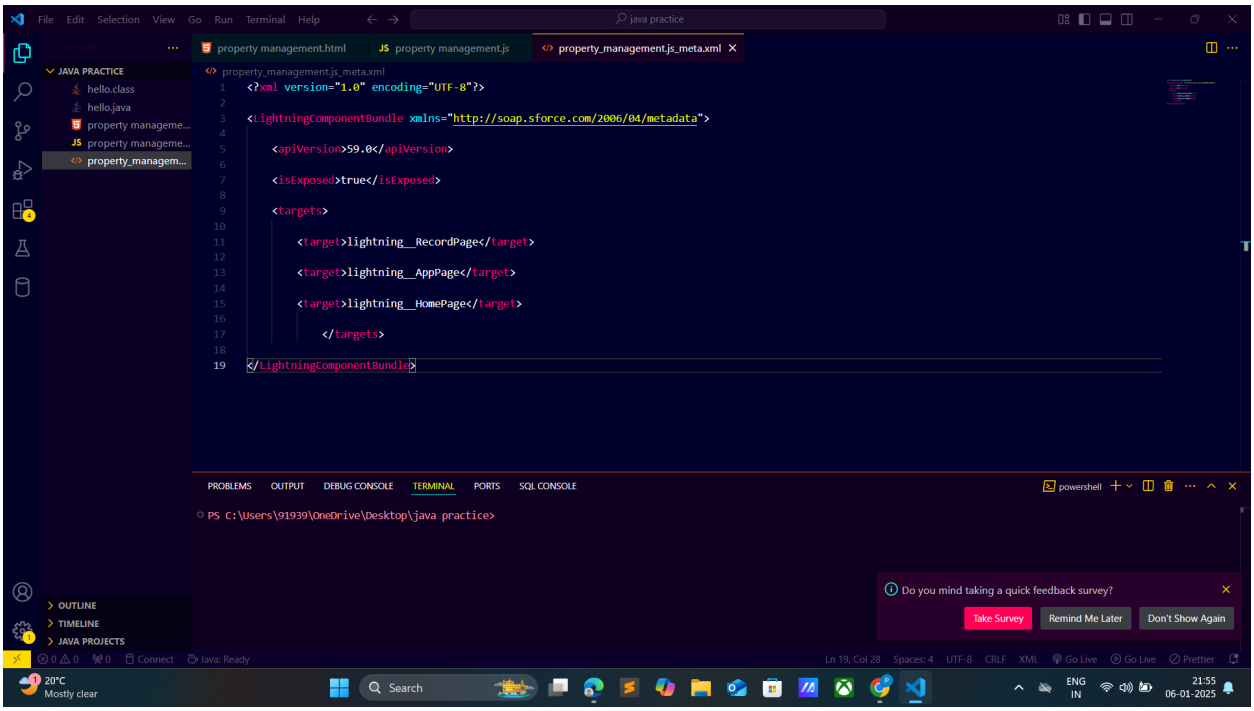

File Edit Selection View Go Run Terminal Help
java practice
property management.html
property management.js
property_management.js_meta.xml
JAVA PRACTICE
hello.class
hello.java
property manageme...
property manageme...
property_managem...
property management.html > template
<template>
<lightning-card>

<h1 style="font-size: 20px;">Properties</h1>

<lightning-combobox name="Type" label="Property Type" value={typevar} placeholder="Select Property type"
options={propetyoptions} onchange={changehandler}></lightning-combobox>

PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL PORTS SQL CONSOLE
powershell
PS C:\Users\91939\OneDrive\Desktop\java practice>
Do you mind taking a quick feedback survey?
Take Survey
Remind Me Later
Don't Show Again
OUTLINE
TIMELINE
JAVA PROJECTS
Ln 66, Col 12 Spaces: 4 UTF-8 CRLF HTML Go Live Go Live Prettier
20°C
Mostly clear
Search
ENG
IN
21:54
06-01-2025


File Edit Selection View Go Run Terminal Help
java practice
property management.html
property management.js
property_management.js_meta.xml
JAVA PRACTICE
hello.class
hello.java
property manageme...
property manageme...
property_managem...
property management.js > C_01_Property_Management
import { LightningElement, api, track, wire } from 'lwc';
import getProperty from "@salesforce/apex/PropertHandler_LWC.getProperty"
import { getRecord } from 'lightning/uiRecordApi';
import USER_ID from '@salesforce/user/Id';
export default class C_01_Property_Management extends LightningElement {
@api recordId
userId = USER_ID;
verifiedvar
typevar
isfalse = true;
istrue = false;
@track propertylist = [];
columns = [
PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL PORTS SQL CONSOLE
powershell
PS C:\Users\91939\OneDrive\Desktop\java practice>
Do you mind taking a quick feedback survey?
Take Survey
Remind Me Later
Don't Show Again
OUTLINE
TIMELINE
JAVA PROJECTS
Ln 125, Col 2 Spaces: 4 UTF-8 CRLF JavaScript Go Live Go Live Prettier
20°C
Mostly clear
Search
ENG
IN
21:55
06-01-2025


property_management.js_meta.xml
<?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>
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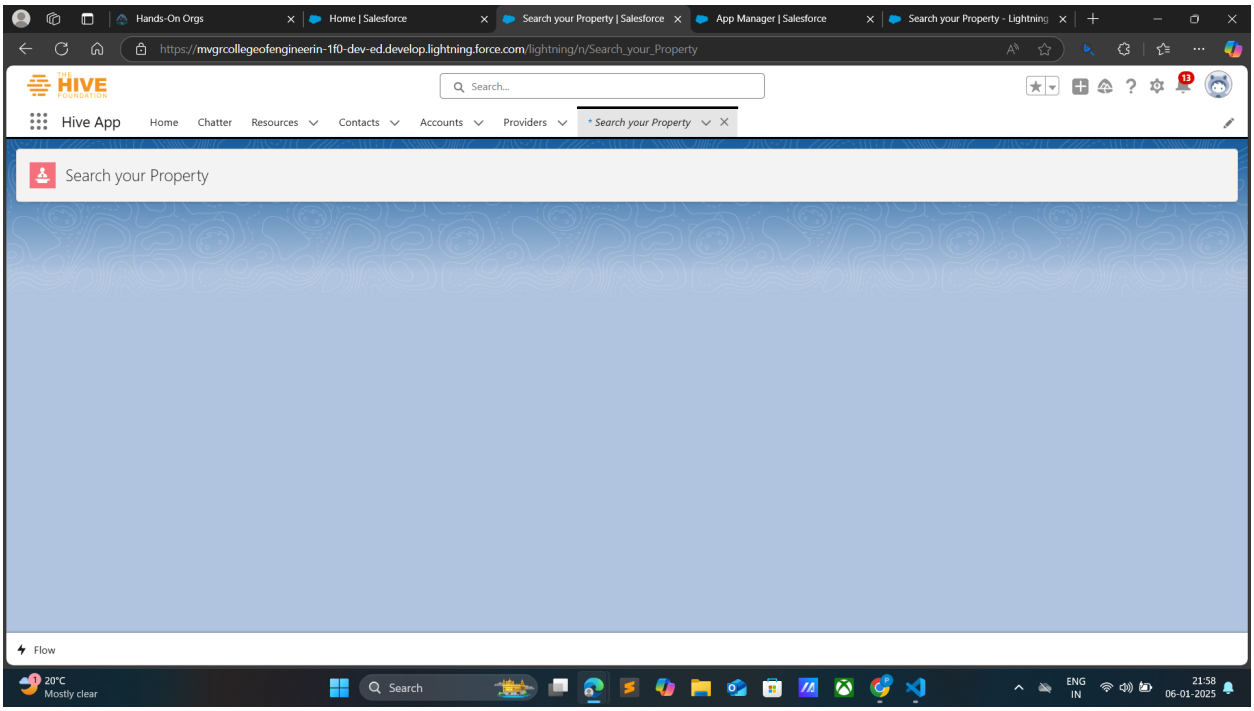
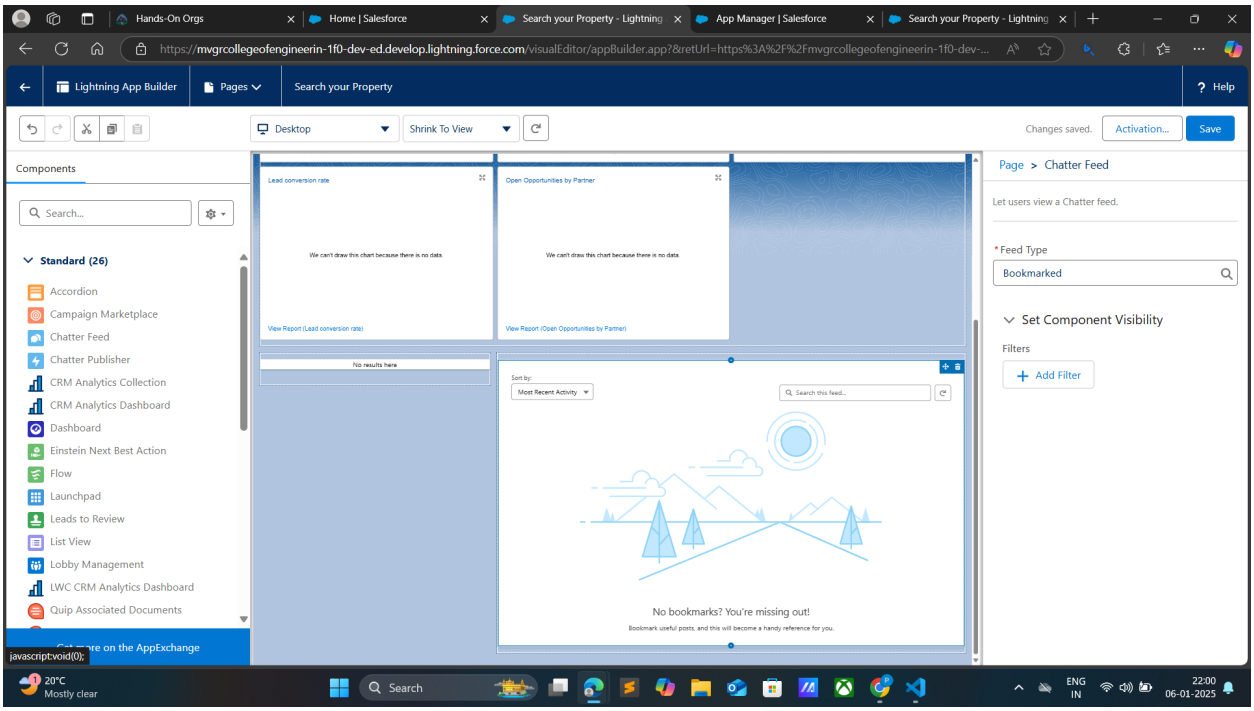
</LightningComponentBundle>
PS C:\Users\91939\OneDrive\Desktop\java practice>
Do you mind taking a quick feedback survey?
Take Survey
Remind Me Later
Don't Show Again

activity


Hive App
Home
Chatter
Resources
Contacts
Accounts
Providers
Search your Property
Search your Property
Flow



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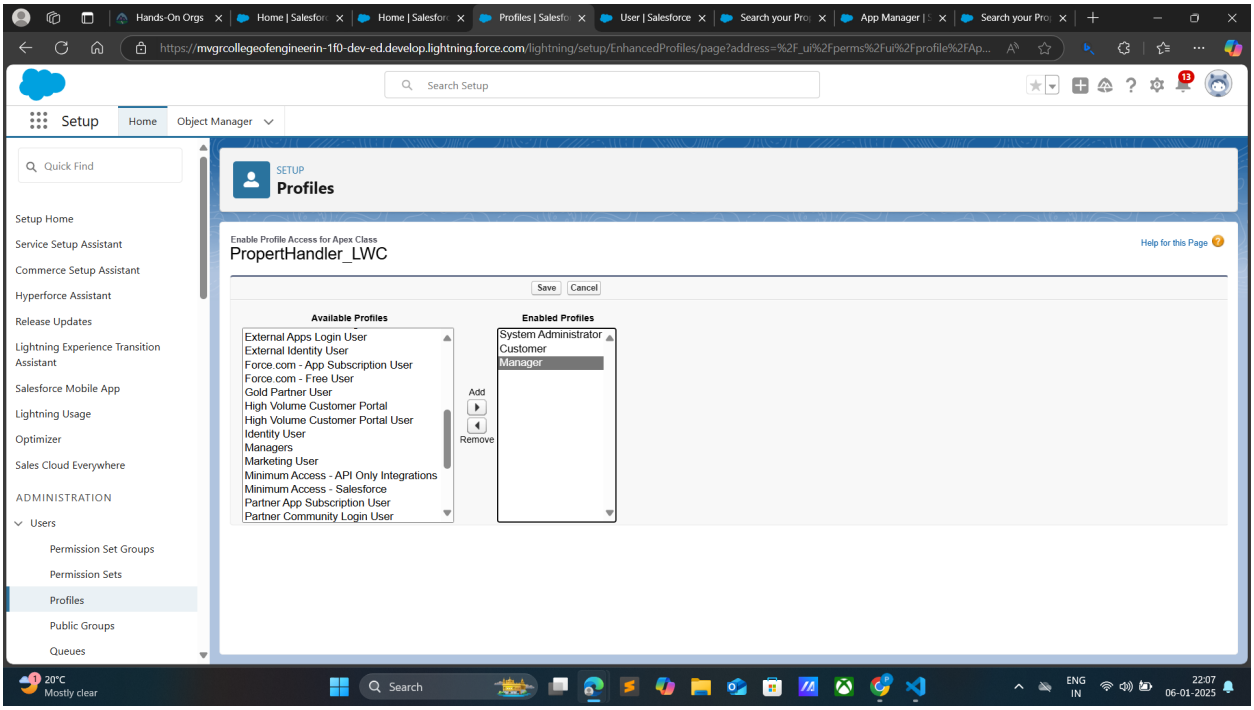

4. Detailed Steps to Solution Design

1. Requirement Gathering:

- Understand the key pain points and requirements of the property management

business.
● Document needs related to client management, property tracking, and transaction processes.

2. Data Model Design:

● Create custom objects such as Client, Property, Transaction, and Agent.
● Define relationships between objects (e.g., Clients and Transactions, Properties and Agents).

3. UI Design:

● Develop user-friendly Lightning pages for key entities like Clients and Properties.
● Implement search functionality for quick access to records.

4. Business Logic Implementation:

●Use Apex classes and triggers for custom business rules, such as updating property availability after a transaction.
● Configure validation rules to ensure accurate data input.

5. Automation:

● Create workflows for sending automated emails, such as property availability notifications or transaction confirmations.
● Use Process Builder for follow-up reminders based on property inquiries or transaction status.

6. Reports and Dashboards:

●Build dashboards showing property trends, client interactions, and transaction statuses.
● Configure real-time reports for quick insights into property listings, sales, and client interactions.

5. Testing and Validation

Unit Testing:

Test Apex classes and triggers to ensure accuracy in business logic implementation.

User Interface Testing:

Validate the usability and responsiveness of Lightning pages across devices.

Integration Testing:

Verify data flows between different Salesforce components and third-party systems (if any).

User Acceptance Testing (UAT):

Engage end-users to test the application against real-world scenarios.

6. Key Scenarios Addressed by Salesforce in the Implementation

Efficient tracking of client inquiries, property listings, and transaction statuses.
Maintaining accurate property details and availability with automated updates.

Generating detailed reports on sales, client interactions, and property performance.
Automating repetitive tasks such as follow-ups, notifications, and reminders.
Enabling mobile access for field agents and sales teams.
Providing a 360-degree view of client and property information to improve service quality.

7. Conclusion

Summary of Achievements:
Successfully implemented a customized CRM solution for managing clients and their property-related requirements using Salesforce.
Streamlined client and property management processes.
Enhanced customer relationship management through automation and detailed insights.
Improved property tracking, transaction efficiency, and operational transparency.
Delivered a scalable and user-friendly system aligned with the business's long-term goals.
This project demonstrates Salesforce's potential as a transformative tool for the property management industry, setting a strong foundation for future growth and innovation.