A CRM Application to Handle the Clients and their property Related Requirements

ProjectDescription:

Dreams World Properties integrates Salesforce to streamline customer interactions. Website engagement triggers automated record creation in Salesforce, capturing customer details and preferences. Salesforce categorizes users as approved or non-approved, offering tailored property selections to approved users. This enhances user experience and efficiency, providing personalized recommendations and broader listings.Seamless integration optimizes operations, improving customer engagement and facilitating growth in the real estate market.

1. Client Management
    a. Add,update, and delete client details.
    b. Track client preferences, budget, and location interests.
    c. Maintain contact details and communication history.

2. Property Management
    a. Manage property listings with details like type, price, location, and features.
    b. Track properties available for sale, rent, or lease.
    c. Upload photos and documents for properties.

3. Requirement Matching
    a. Match client requirements with available properties using filters.
    b. Notify clients about new properties that fit their criteria.

4. Lead Tracking
    a. Manage inquiries and follow up with potential clients.
    b. Schedule meetings and site visits.
    c. Assign leads to specific team members.

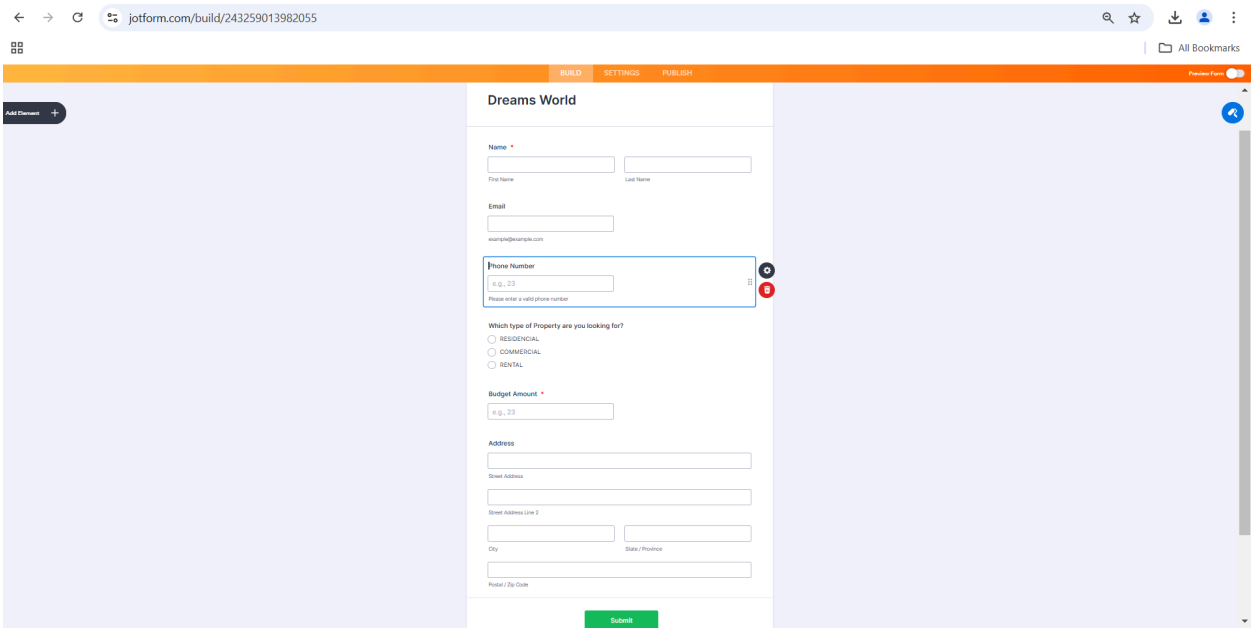
Milestone 1: Create a Jot form and integrate it with the org to create a record of customers automatically.

Client wants a form for the customers to get the details directly into the salesforce so that the admins can create a user in the org.Client wants a form for the customers to get the details directly into the salesforce so that the admins can create a user in the org.

Activity1

Open your browser and search for jot form and log in.

1. After login click on create form and click on start from scratch
2. Now create a form to get the customer details like Name, Phone,EmaiI, Address and type of property the customer is interested in.
3. Once the form is created, publish it by clicking on publish.
   form link :-https://form.jotform.com/243259013982055



Create Objects from Spreadsheet

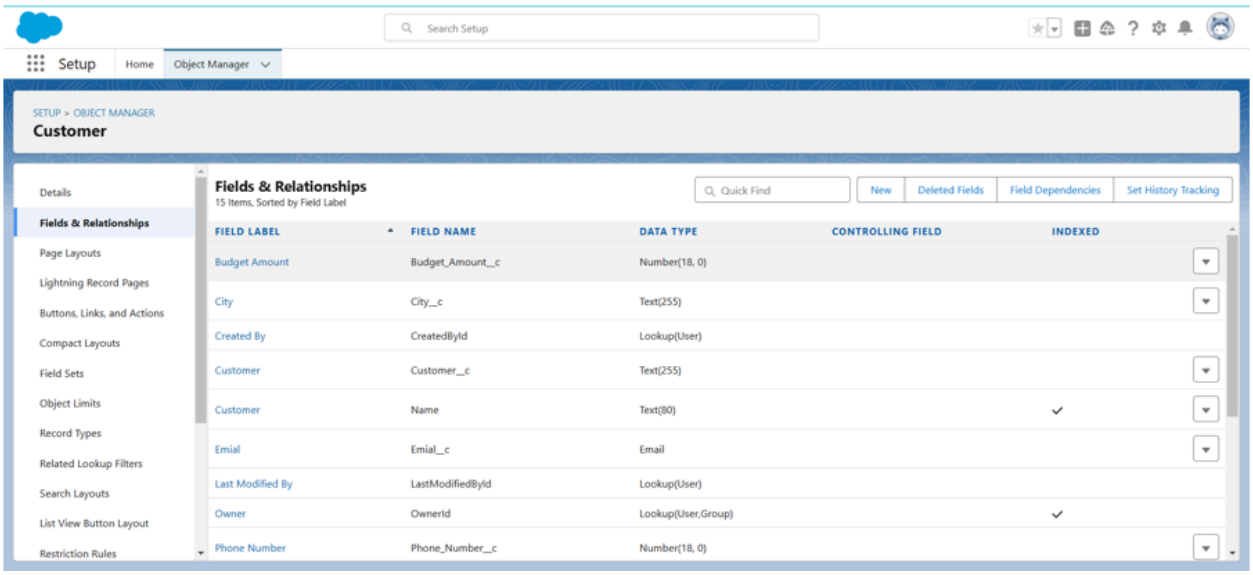
Directly Creating Objects from Spreadsheet in Salesforce

Creating Customer Object :

1. Go to your object manager and and click on create object from spreadsheet.
2. Click on the link to get the spreadsheet
3. customer

A	B	C	D	E	F	G	H	I	J	K
Customer	Phone Number	Emial	State	Property Type	Budget Amoun	Street Address	Street Address	City	postal code	Verified
Rakesh	788797	rakesh@gmail.	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	Maharashtra	Rental	25000	kamdli	kathora	Amravati	444805	checked

After downloading, upload the file, map the fields and upload to create an object.



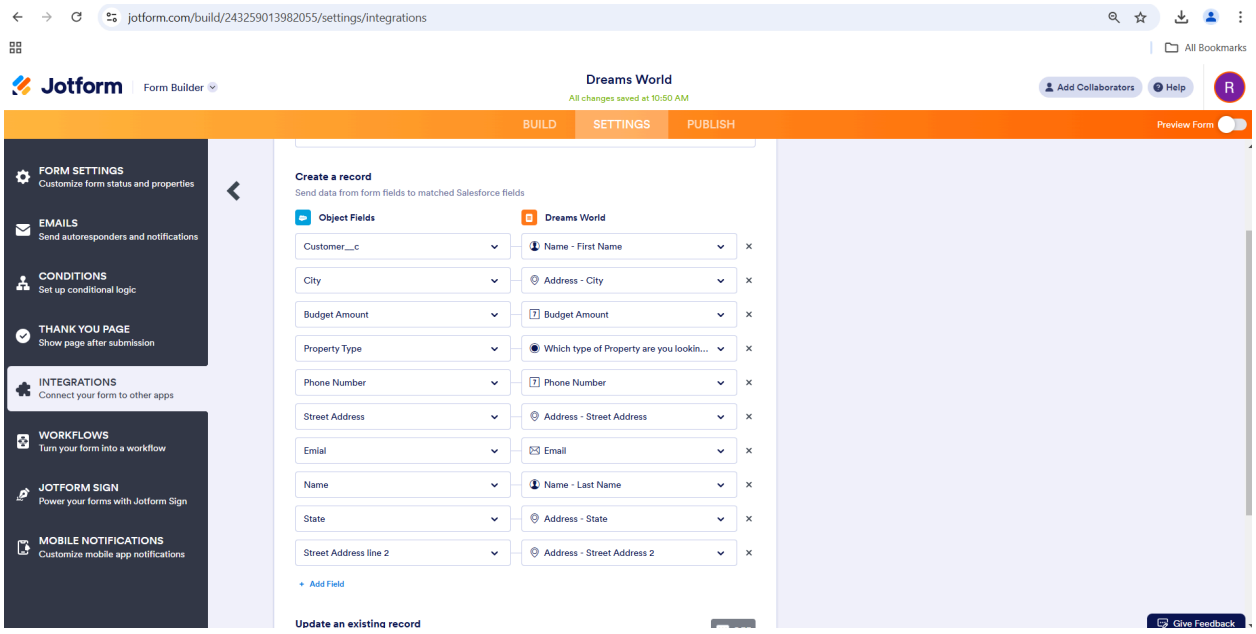
Integrate Forthwith Salesforce Platform

In this Milestone we are going to integrations with Salesforce

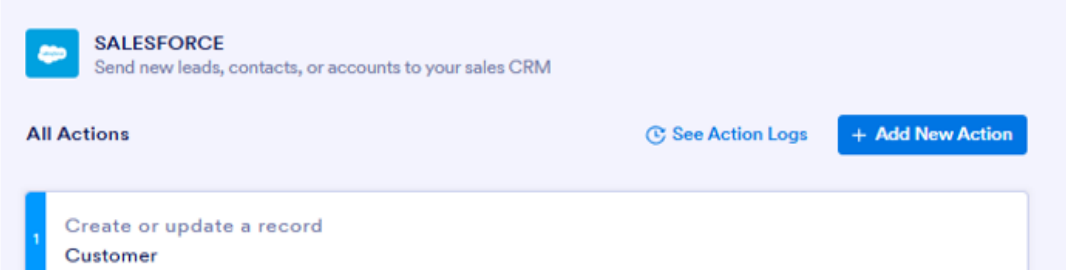
Activity

1. On the Jot form Platform, Click on Integration and choose Salesforce
2. Click on User Integration and choose “Add to From”
3. Select the Org with which you want to Integrate your jot form with and select your account
4. Select an Action -Create a record.
5. Select a Salesforce Object : - Customer

Map Each and every field on the Object with the fields on the form and “Save Action”.

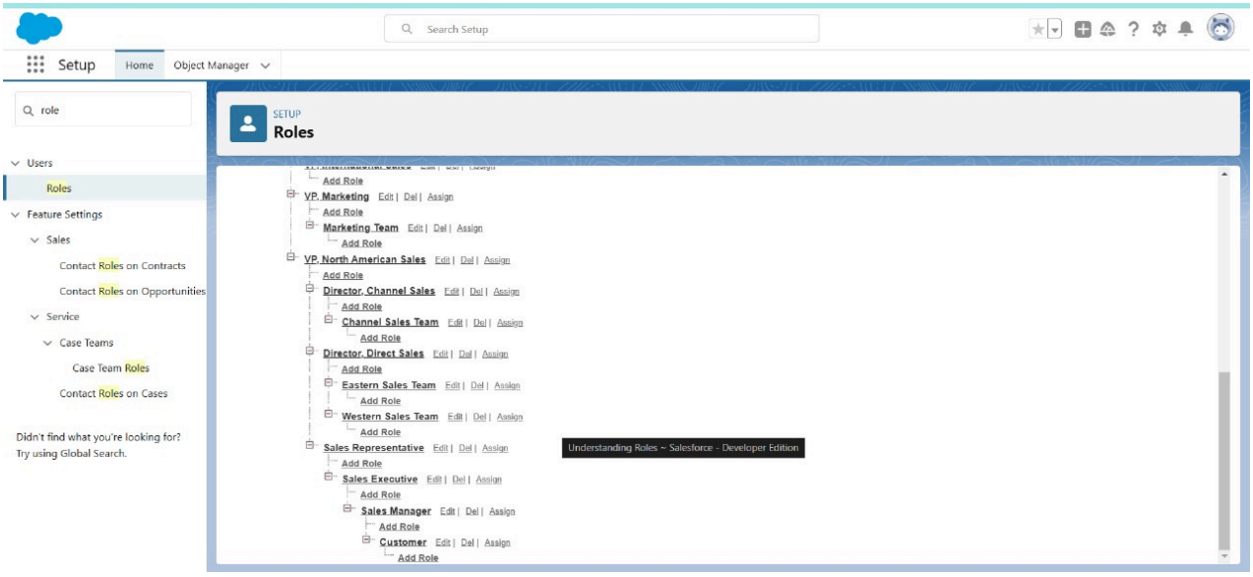


Then “Save the Integration” and “Finish”.



here we need to Create Roles as per businessrequirenment

Activity:- 1



1. if we don't find sales representative we need to create it according Tothentoughened
2. louse the "System Administrator Profile".
3. Label -Sales Executive
4. Reports to-Sales Representative

SimilarlyCreate a Role Name “Sales Manager"below Sales Executive which reports to Sales Executive,Also Add a Role below Sales Manager labeled as “Customer" which reports to Sales Manager.

Create a Property DetailsApp

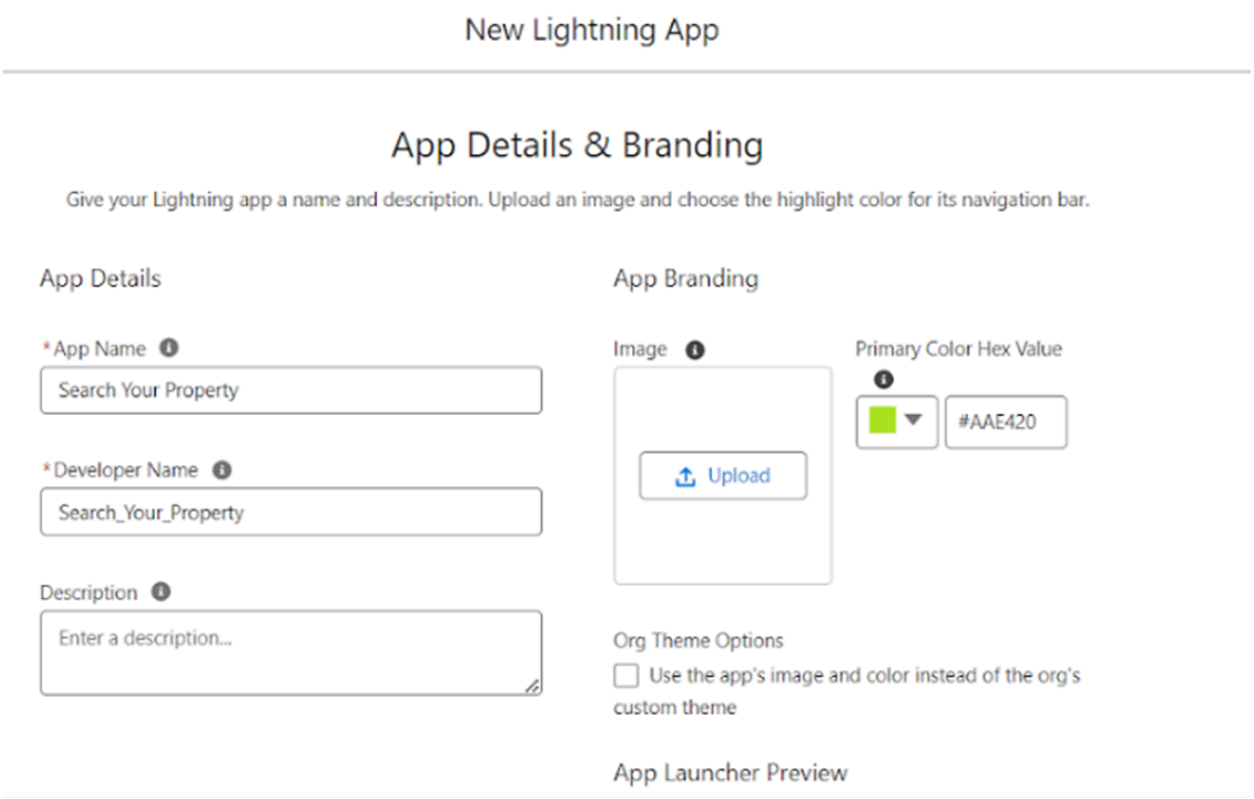
An App where the objects will be displayed

Activity1

1. From Setup>» Got AppManager and click on NewLightning App andNameit as "Property Details" and add "Customer" and "Property" Object.
2. Click Next >» Next >» Save and Add “System Admin "Profile.

App Details & Branding

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

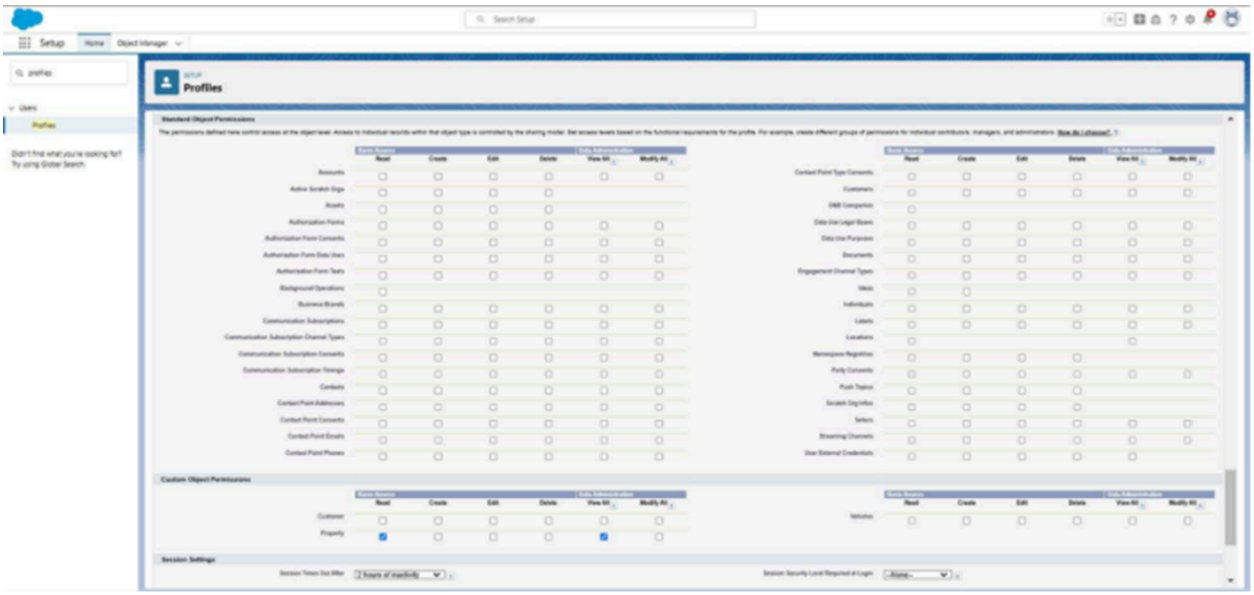


Create Profiles

Create profiles as per business requirement

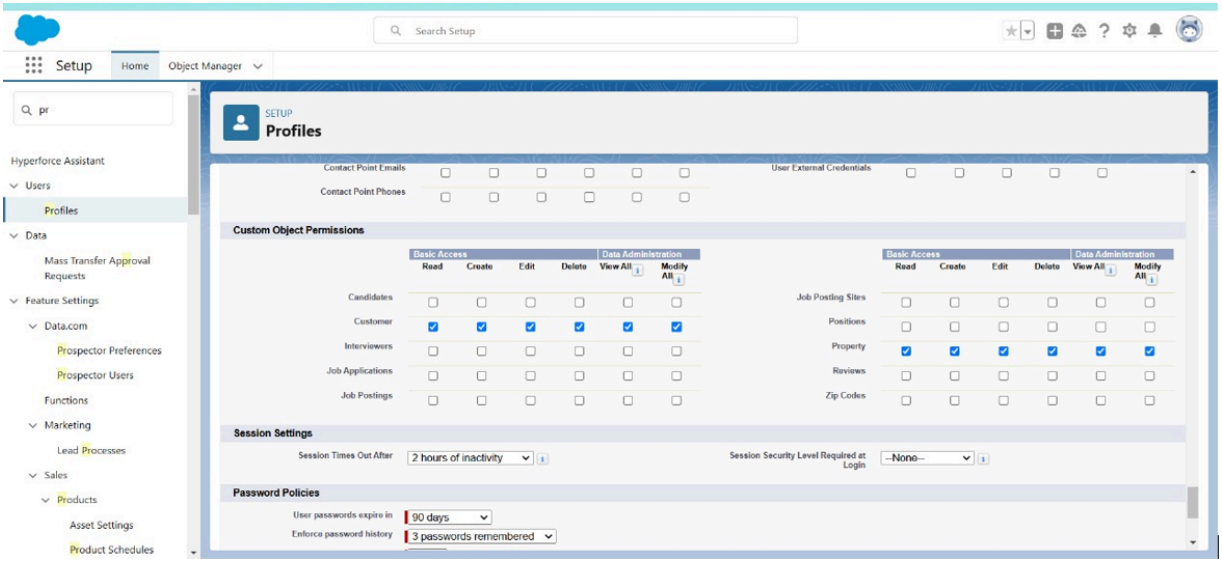
Creating Customer Profiles

1. From Setup? Go to Profiles and Clone (standard pIatform)SaIesforce Platform User and Name it “Customer”..
2. Uncheck all the Custom Objects andCheck onlyProperty Details From Custom App Settings.
3. so RemoveallthеStandard Object Permissions
4. Uncheck all the Custom Object Permissions and check read and view all in “Property”
5. make sure every submission object permissions are unselected and then save



Creating ManagerProfiles:-

1. From Setup » Go to Profiles andClone Salesforce Platform User and Name it “Manager”.
2. Uncheck all the Custom Objects and Check onlyProperty Details From Custom App Settings.
3. Also Remove all the Standard Object Permissions.
4. Uncheck all the Custom ObjectPermissions and check only“modify all” from “Property” and“Customer”.

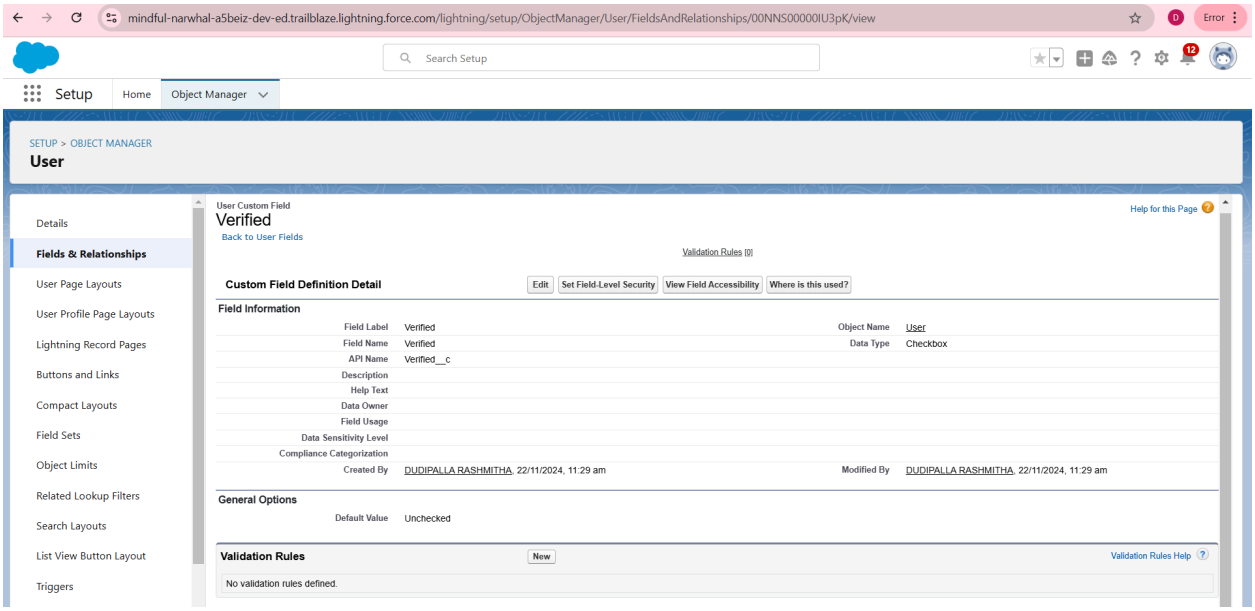


Create a CheckBoxfield on user

Create Field on the User as per the business requirement.

Activity:- 1

1. Setup >> Object Manager >> Search for User >> Fields and Relationships
2. select the Data type “Check Box”
3. Create new Field Named as “Verified”



Create Users

Create three different users with three differentRoles and profiles as we have mentioned above. here we are going to create 4 users

User : 1

1. Got Setup --> Administration -->Users --> NewUser
2. Last Name - Executive
3. Role - Sales Executive
4. License - Salesforce
5. Profile -System Administrator
6. Save

User : 2

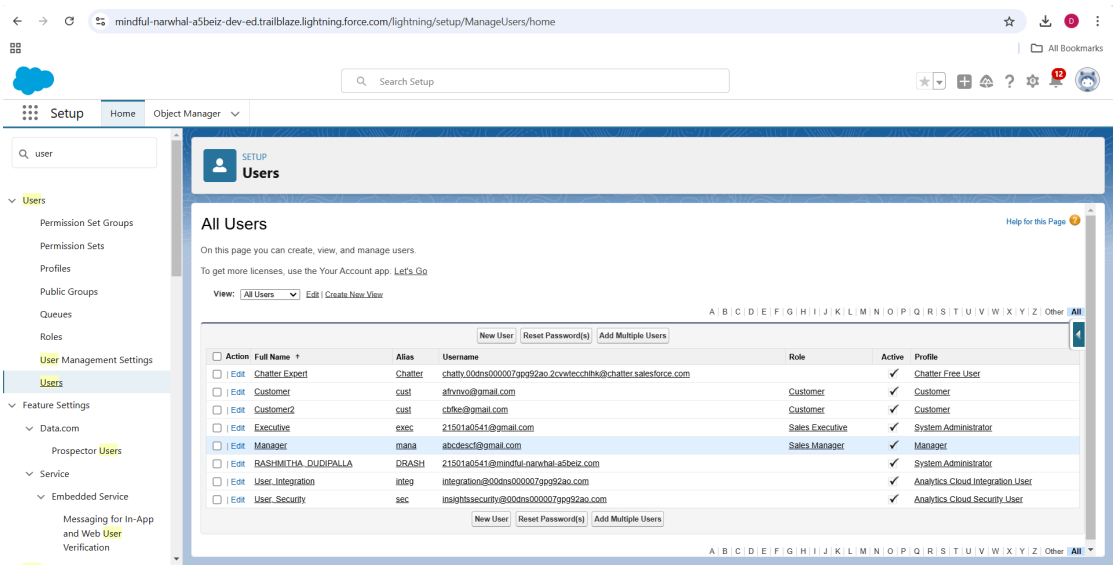
1. Got Setup > Administration >› Users ›>New User
2. Last Name>> Manager
3. Role >> Sales Manager
4. License >> Salesforce Platform

User : 3

1. Go to Setup»>Administration »> Users »> New User
2. Last Name » Customer
3. Role >> Customer
4. License»>Salesforce Platform
5. Profile»>Customer
6. Make Sure the verifiedcheckboxis"Unchecked"
7. Save

User : 4

1. Got Setup »> Administration >> Users >> New User
2. Last Name >> Customer2
3. Role >» Customer
4. License >> Salesforce Platform
5. Profile »> Customer
6. Make Sure the verified check box is "checked"
7. Save



Create an ApprovalProcessfor Property Object

An Approvalprocessto approve or reject the records as according

Activity1

1. From Setup >>Process Automation >Approval Process
2. before proceeding we need to select property in ten manage approval process
3. Process Name- Property Approval
4. select 2 criteria -
5. Location- i not equal to- blank,
6. Verified- Equals- false
7. Click next and "Next Automated Approver Determined By" Select Manager
8. FromRecord Edit ability Properties >>Click on AdministratorsoRthe currently assigned approver can edit records during the approval process.
9. FromStep 5. Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.

1. Click Next and Select the initial Submiters »
2. Owner >> Property Owner
3. Roles>> Sales Manager
4. Save.

after saving we are directed to approval steps and we need to do as follows Add an approval step name "ExecutiveApproval ”

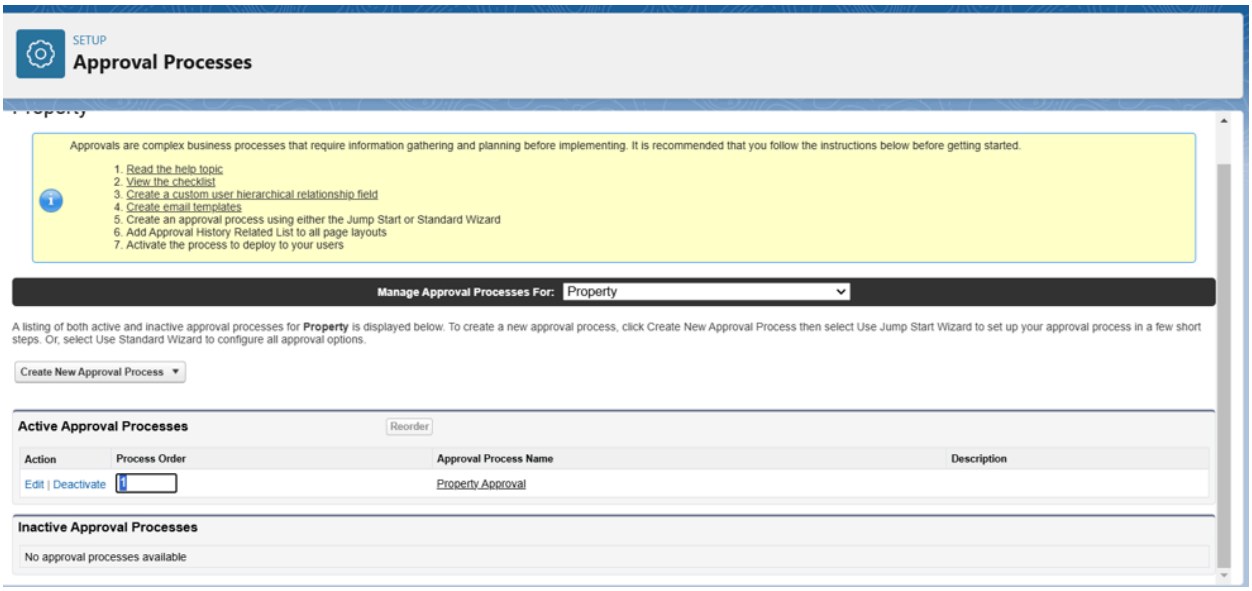
click next and select the Approver as ”Sales Executive“and "Save" AddOne field Update as "VerifiedProperty"

1. Select Object »Property
2. Field to Update >> Verified
3. Field DataType >»CheckBox
4. Select CheckBox Option as"True"
5. Save.

Add One fieldUpdate as "UnVerified Property"

1. Select Object » Property
2. Field toUpdate >»Verified
3. Field DataType >»CheckBox
4. Select CheckBox Option as"False"
5. Save.

Activate the Approval Process.



Create a Record trigger now to submit the Approval Process Automatically

A flow that can submit the records directly for approval

Activity1

a. FromSetup >>Search forFlows >>Click OnNew andSelect “Record Trigger Flow”.

b. SelectObject >>Property

c. Select“Trigger the flow when” >> “A record is created”

d. SetEntry Conditions>> “None”

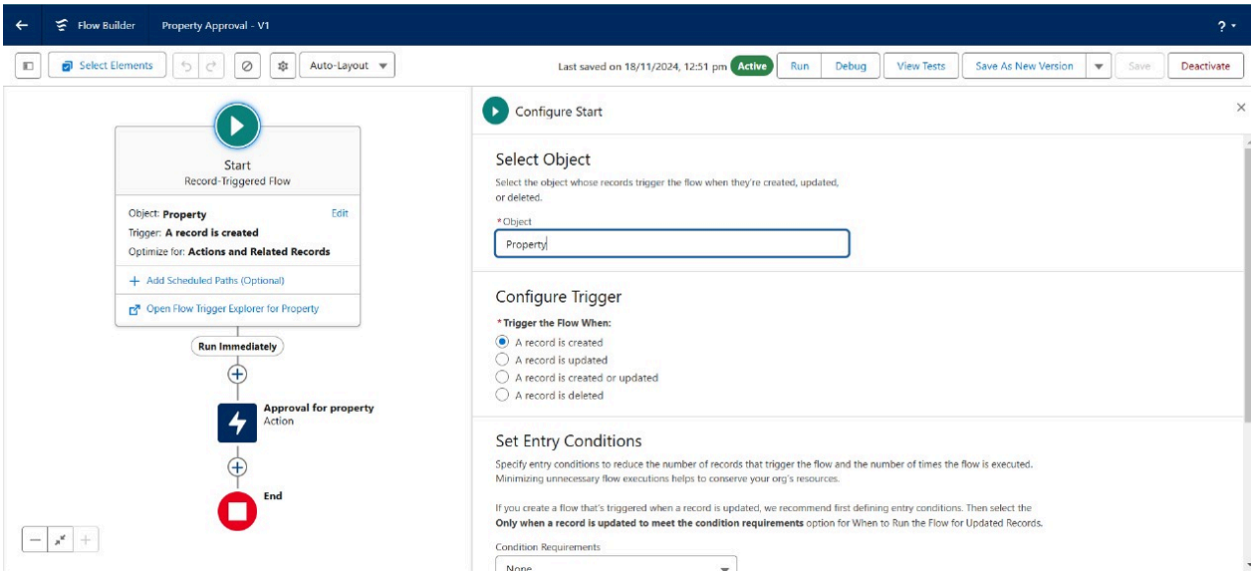
e. Add a“Action” >> “Submit for Approval”

f. Give Label >> Approval for property

g. Record Id>> (!SRecord.Id)

h. Done

Save the Flow and Give label as “Property Approval” and “Activate”

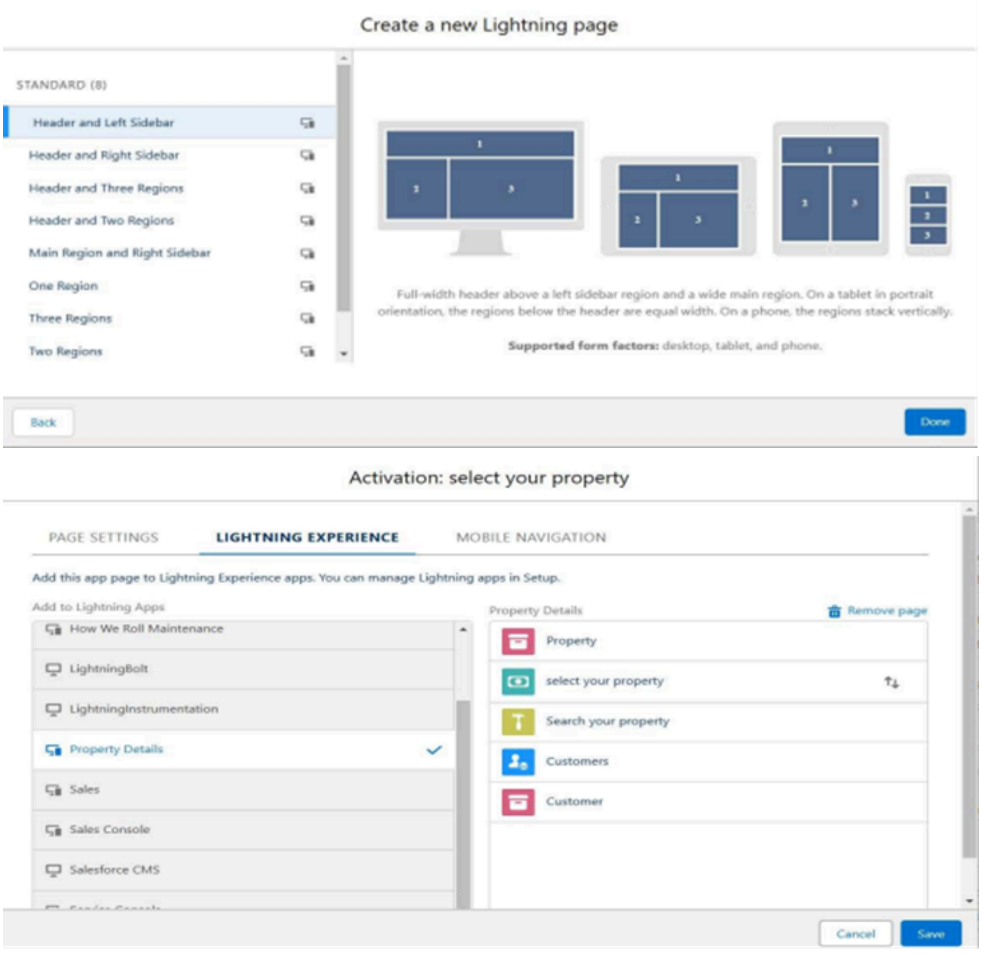


Create an App Page

Create an App Page on the Property details Object named as “Search Your Property”

Activity1

1. From Setup »Go to Lightning App Builder >> Click on New >> Select App Page and
2. Click on Next.
3. Give Labelas“Search your Property” click “Next”.
4. Click “header and Left Sidebar” and Click on “Done”
5. Click on “Save ”and then click on “Activate”.
6. From Page Settingselectpageactivationas “Activate for all Users”.
7. From Lightning ExperienceClick on “Property Details” and click on Add Page“.
8. Then Clickon“Save”



Create a LWC Component

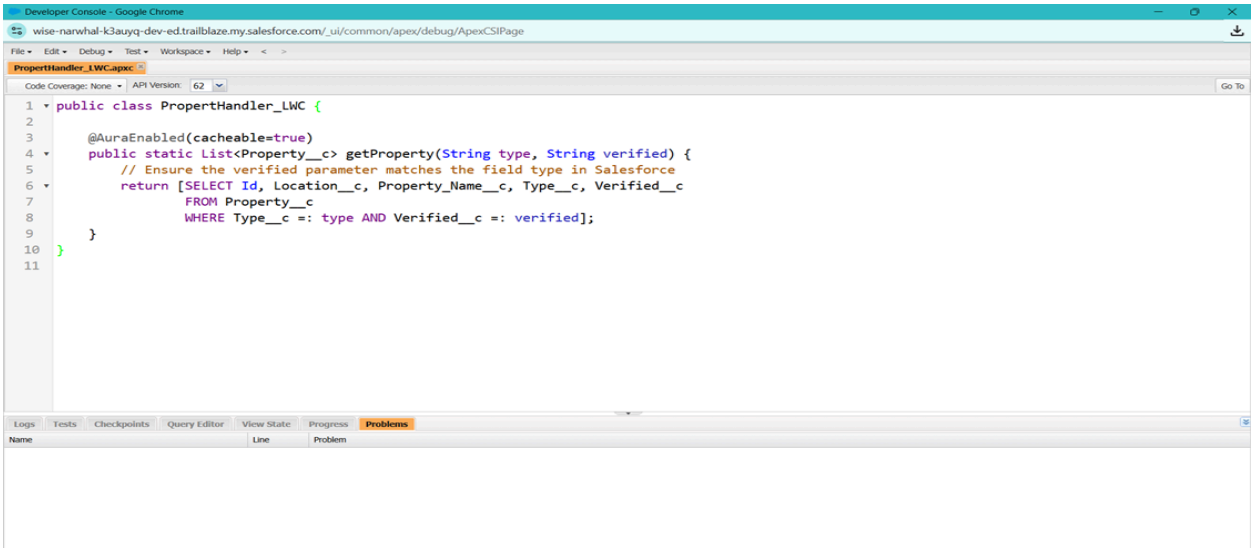
a. Create an LWCComponent for the customers so that only verified customers can access the verified properties and non Verified customers can access non verified properties, and deploy it on “Search your Property Page”

Activity1

1. Create an ApexClass mandrake aura enabled and name it “PropertHandIer_LWC”

Code: -

```
publicclassPropertHandIer_LWC (
@AuraEnabIed(cacheabIe=true)
public static List<Property> getProperty(String type, Boolean verified) (
Stringverifiedstr=verified?'true':'false'//Convert boo lean to string return [SELECT
Id, Location c, Property_Namec, Type c, Verified c
FROM Property c
WHERE Type c = :type AND Verifiedc= :verifiedStr];
```



1. Create a Lightning Web Component in your VsCode, and (ctrl+shift +P) and click on authorize an org.
2. Enter your login id and password to authorize your org.

3. Now (ctrl+shift +P) and Create a lightning Web Component and Name it Anything you want to. (Example -

4. In yourHtml File Write this code : -

Code :-

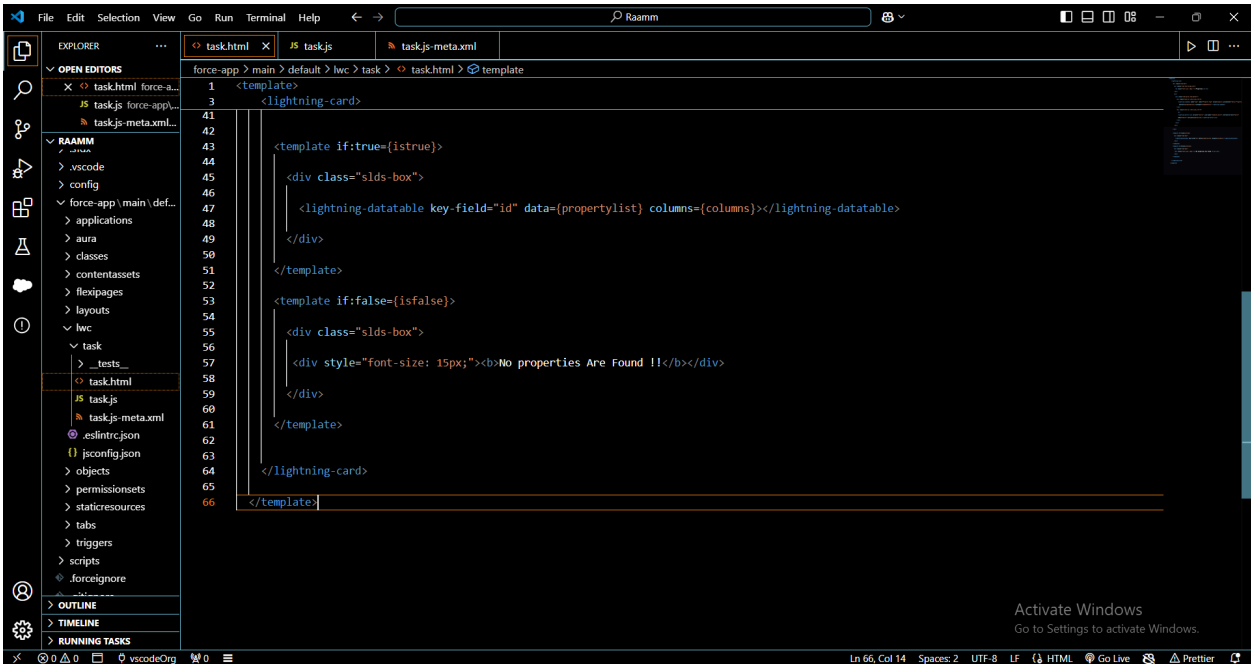
```
<template>
  <lightning-card>
    <div class="slds-box">
      <div class="slds-text-align_left">
        <h1 style="font-size: 20px;"><b>Properties</b></h1>
      </div>
      <div>
        <div class="slds-grid slds-gutters">
          <div class="slds-col slds-size_5-of-6">
                        <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">
            <bar>
                    <lightning-button-icon variant="neutral" icon-name="standard:search" alternative-text="Search"
            label="Search" onclick={handleClick}></lightning-button-icon>
          </div>
        </div>
      </div>

    </div>

    <template if:true={istrue}>
      <div class="slds-box">
            <lightning-datatable key-field="id" data={propertylist} columns={columns}></lightning-
datatable>
      </div>
    </templates
    <template if:false={isfalse}>
```

No properties Are Found !!

</template›

</lightning-card>

</templates>

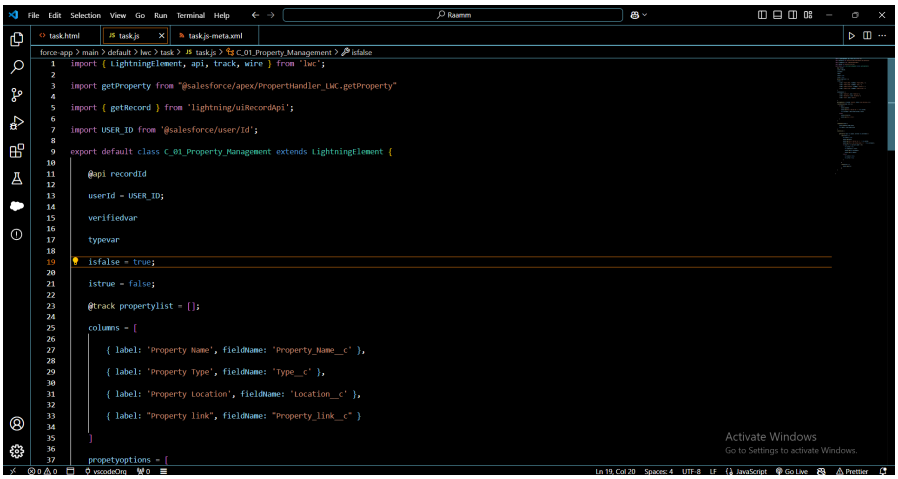


1. In YourJs FileWrite this code: -

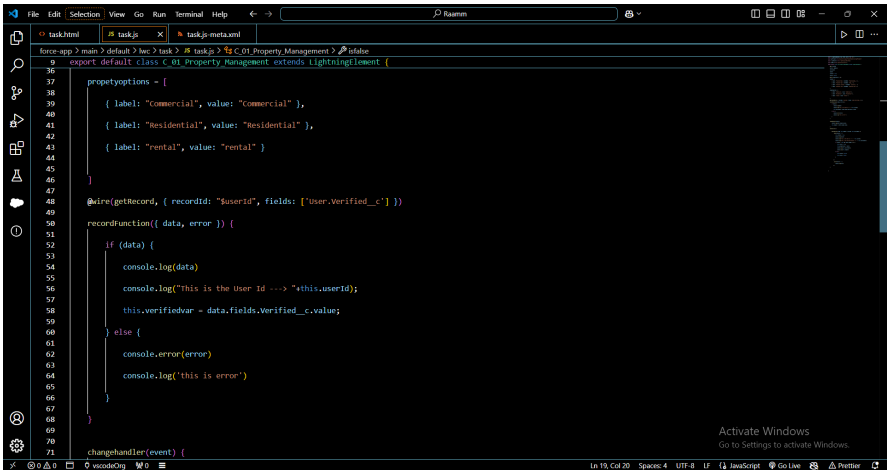
Code :-

```
import ( LightningElement, api, track, wire ) from 'Iwc';
import getProperty from "@salesforce/apex/PropertHandIer_LWC.getProperty"
import ( getRecord } from 'lightning/uiRecordApi'; import USER
ID from '@salesforce/user/Id';
export default class C 01_Property_M mismanagement LightningElement ( @api recordld
    user=recorded
    verifiedvartypevar
    is false = true; istrue
    = false;
    @track property list = [];
    columns = [
        ( label: 'Property Name', fieldName: 'Property_Name  c' ), ( label:
        'Property Type', fieldName: 'Type  c' ),
        ( label: 'Property Location', fieldName: 'Locationc' ), ( label:
```

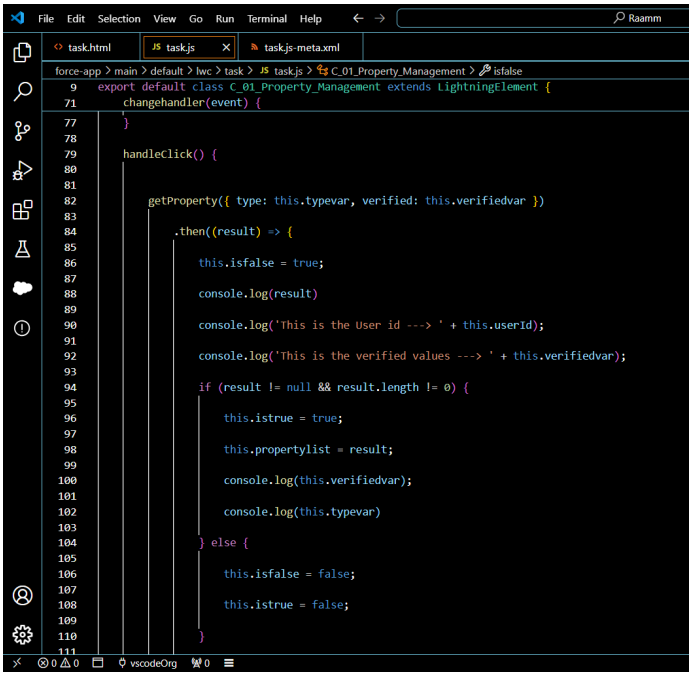
```
    "Property link", fieldName: "Property  link   c"}
propetyoptions= [
    ( label: "Commercial", value: "Commercial" }, ( label:
    "Residential", value: "Residential" ),
    ( label: "rental", value:"rental" }

@wire(getRecord, ( recorded: "$user", fields: ['User.Verified   c'] )) recordFunction(( data,
error }) (
    if (data) ( console.log(data)
        console.log("This is the User Id ---> "+this.userId);
        this.verifiedvar = data.fields.Verified   c.value;
    } else (
        console.error(error)
        console.log('this is error')
changehandIer(event) (
    console.log(event.target.value); this.typevar =
    event.target.value;
handleClick() {
    getProperty(( type:this.typevar,verified: this.verifiedvar ))
        .then((result) => ( this.isfaIse =
            true; console.log(result)
            console.log('This is the User id ---> ' + this.userId);
            console.log('This is the verified values ---> ' + this.verifiedvar); if (result !=
            null && result.length != 0) (
                this.istrue = true; this.propertyIist =
                result; console.log(this.verifiedvar);
                console.log(this.typevar)
            ) else (
                this.isfaIse = false;
                this.istrue = false;
        .catch((error) => (
            console.log(error)
```



```
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 = [

        { label: 'Property Name', fieldName: 'Property_Name__c' },

        { label: 'Property Type', fieldName: 'Type__c' },

        { label: 'Property Location', fieldName: 'Location__c' },

        { label: "Property link", fieldName: "Property_link__c" }
    ]

    propetyoptions = [
```



```
export default class C_01_Property_Management extends LightningElement {

    propetyoptions = [

        { label: "Commercial", value: "Commercial" },

        { label: "Residential", value: "Residential" },

        { label: "rental", value: "rental" }

    ]

    @wire(getRecord, { recordId: "$userId", fields: ['User.Verified__c'] })

    recordFunction({ data, error }) {

        if (data) {

            console.log(data)

            console.log("this is the User Id ---> "+this.userId);

            this.verifiedvar = data.fields.Verified__c.value;

        } else {

            console.error(error)

            console.log('this is error')

        }
    }

    changehandler(event) {
```

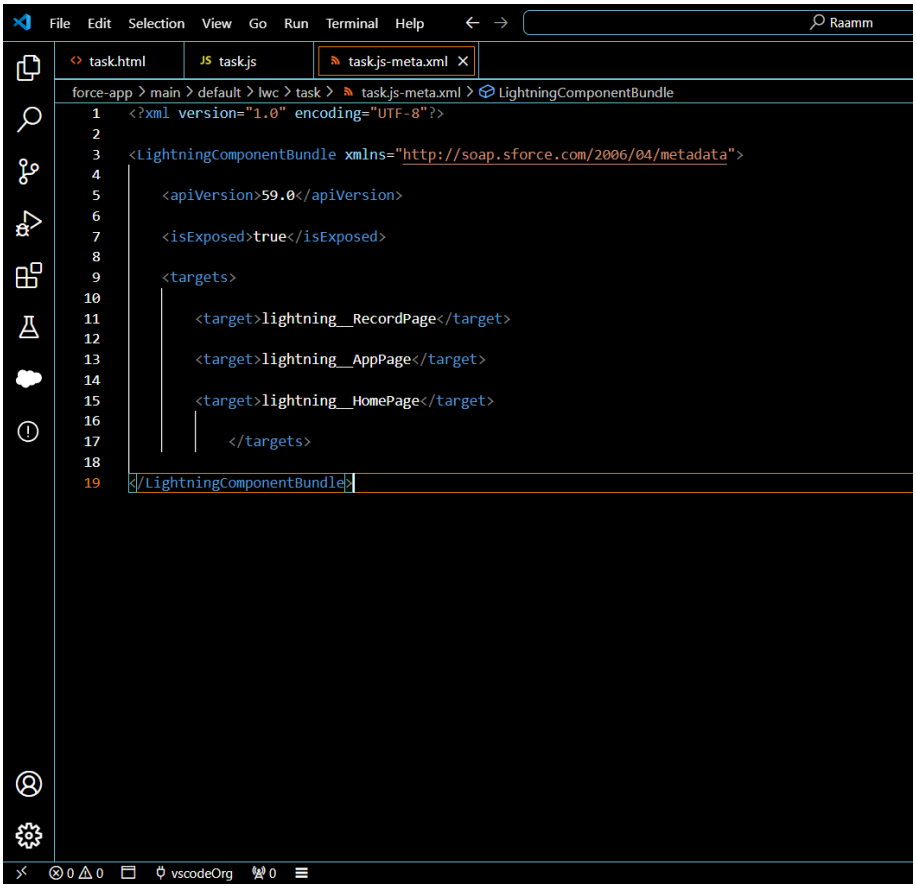


```
export default class C_01_Property_Management extends LightningElement {
    changehandler(event) {
    }

    handleClick() {

        getProperty({ type: this.typevar, verified: this.verifiedvar })
            .then((result) => {

                this.isfalse = true;

                console.log(result)

                console.log('This is the User id ---> ' + this.userId);

                console.log('This is the verified values ---> ' + this.verifiedvar);

                if (result != null && result.length != 0) {

                    this.istrue = true;

                    this.propertylist = result;

                    console.log(this.verifiedvar);

                    console.log(this.typevar)

                } else {

                    this.isfalse = false;

                    this.istrue = false;

                }
```

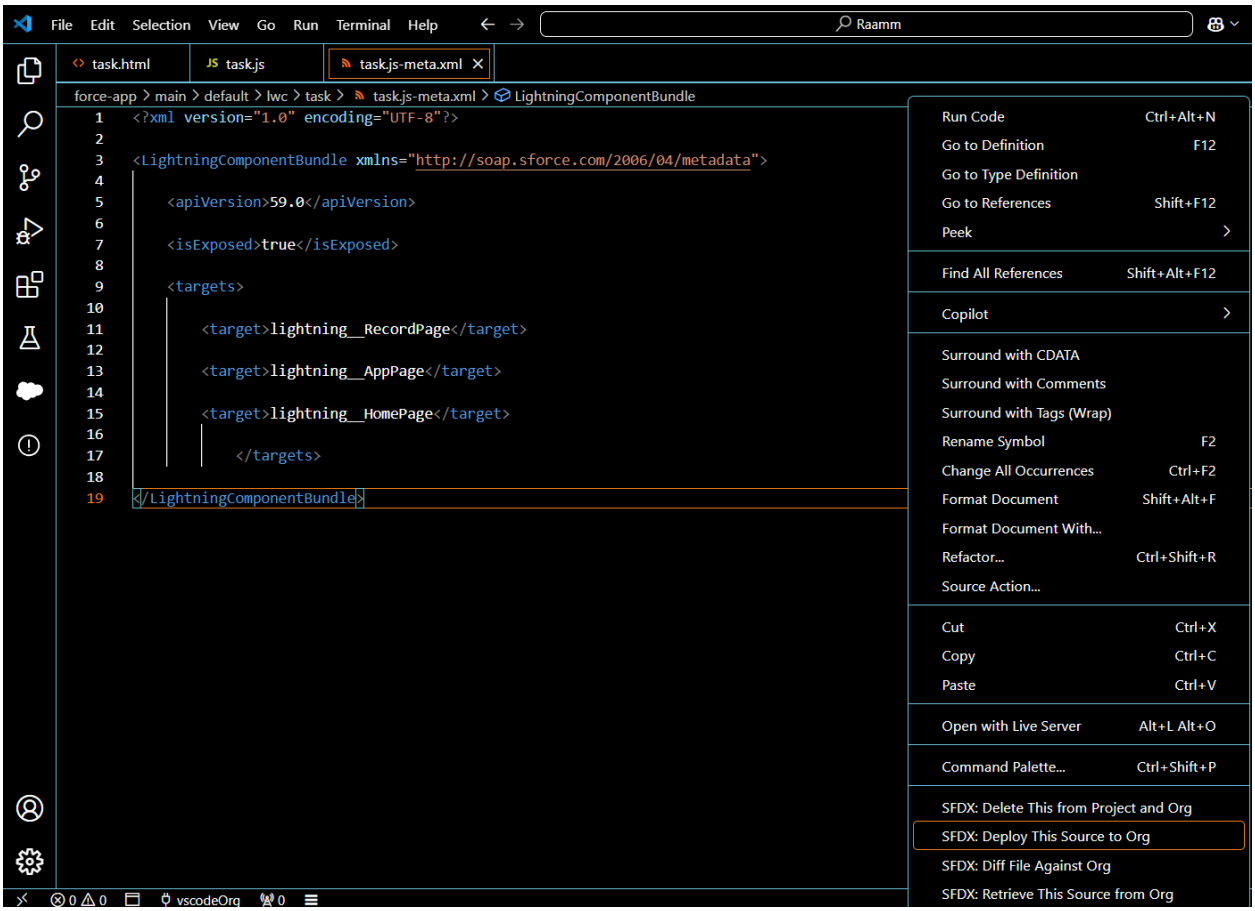
1. In Your metafile giveyour targets to deploy the component.

Code

```
<?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</targets
        <target>lightning__AppPage</targets
        <target>lightning__HomePage</targets
            </targets>
</LightningComponentBundle>
```



After Saving all the three Codes , Right Click and deploy this component to the org



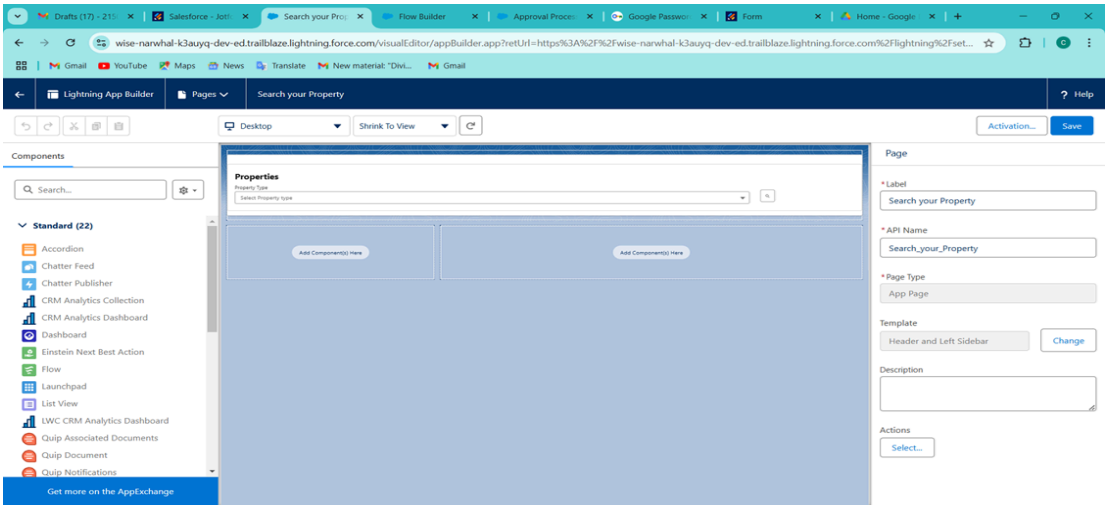
Drag this Component to your App Page

Adding the Componentto your Page

Activity1

1. From Setup >> Go to App Launcher >> Search for PropertyDetails
2. On thisPage click on gear icon and click on EditPage
3. after clicking on edit pageit redirections to apppages then

3. Drag the Component(properties) to your App Page and Save the Page.



Give Access of Apex ClassestoProfiles

The Apex Class has a Security,Enable the security for the profiles that needs to access this class.

1. Activity1

   From Setup>> Search For Apex Classes>> Click on "Security" behind "PropertyHandlerLWC".

2. From Profiles Add"Manager" and"Customer" and"Save".