

A CRM Application To Handle The Clients And Their Property Related Requirements

Project Description:

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

1. Add, update, and delete client details.
2. Track client preferences, budget, and location interests.
3. Maintain contact details and communication history.

2. Property Management

1. Manage property listings with details like type, price, location, and features.
2. Track properties available for sale, rent, or lease.
3. Upload photos and documents for properties.

3. Requirement Matching

1. Match client requirements with available properties using filters.
2. Notify clients about new properties that fit their criteria.

4. Lead Tracking

1. Manage inquiries and follow up with potential clients.
2. Schedule meetings and site visits.
3. Assign leads to specific team members.

Milestone 1:- Create a Jotform 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.

Activity: 1

1. Open your browser and search for jotform and log in.
2. After login click on create form and click on start from scratch
3. Now create a form to get the customer details like Name, Phone, Email, Address and type of property the customer is interested in.
4. Once the form is created, publish it by clicking on publish,
5. form link: <https://form.jotform.com/243250383486055>

The screenshot displays the Jotform Form Builder interface. On the left is a 'Form Elements' sidebar with categories: BASIC, ADVANCED, and WIDGETS. The 'BASIC' category is selected, showing various form components like Heading, Full Name, Email, Address, Phone, Date Picker, Appointment, Signature, Fill in the Blank, Product List, Short Text, Long Text, Paragraph, Dropdown, Single Choice, Multiple Choice, Number, Image, File Upload, Table, Grid, Splitter, Subform, Input Table, Star Rating, Scale Rating, Divider, Section Collapse, and Page Break. The main workspace shows a form titled 'Dreams World' with the following fields: Name (First Name and Last Name), Phone Number (with a placeholder 'e.g., 772'), Email (with a placeholder 'www@domain.com'), Phone Number (with a placeholder 'e.g., 772'), a radio button question 'Which type of Property are you looking for?' with options RESIDENTIAL, COMMERCIAL, and RENTAL, Budget Amount (with a placeholder 'e.g., 772'), Address (Street Address, Street Address Line 2, City, State / Province, and Postal / Zip Code), and a green 'Submit' button. At the bottom, there is a Jotform logo and a 'Create your own Jotform' button.

Create Objects from Spreadsheet

Directly Creating Objects from Spreadsheet in Salesforce

Creating Customer Object:

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

Customer	Phone Number	Email	State	Property Type	Budget Amount	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

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

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup'. Below it, the 'Setup' menu is open, showing 'Object Manager' selected. The main content area is titled 'Customer' and shows the 'Details' tab. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The 'Details' section on the right includes a description field, API Name (Customer__c), Custom checkbox, Singular Label (Customer), Plural Label (Customer), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. There are 'Edit' and 'Delete' buttons at the top right of the details section.

Creating Property Object:

1. Follow the same from the customer object to create the Property Object
2. [Property](#)

A	B	C	D	
Property Name	Type	Location	Verified	
Lotus Appartme	Residential	hydeerabad	checked	
500000 sq.ft pl	Commercial	Amravati	unchecked	
3 Bhk flat at st	rental	Jubilee hill Hyd	Checked	

3. After downloading, upload the file, map the fields and upload to create an object.
4. the fields as follows.

The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Property' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', and 'Restriction Rules'. The 'Details' section is currently selected, showing fields such as 'Description', 'API Name' (Property_c), 'Custom', 'Singular Label' (Property), and 'Plural Label' (Property). On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). Below these, the 'Deployment Status' is shown as 'Deployed', and a link to 'Help Settings' is provided.

Integrate Jotform with Salesforce Platform

In this Milestone we are going to integrate jotform with Salesforce

Activity :-1

1. On the Jotform 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 jotform 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".

Create Roles

Here we need to Create Roles as per business requirement

Activity :- 1

Go to Setup and Click on Roles, then click on Expand all and Add a Role just below the Sales Representative

Cloud logo

Search Setup

Setup Home Object Manager

roles

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

Collapse All Expand All

Prasad.V.Potluri Siddhartha Institute Of Techno...

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

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

Role Edit

Sales Executive

Role Edit

Label	<input type="text" value="Sales Executive"/>
Role Name	<input type="text" value="Sales_Executive"/> ⓘ
This role reports to	<input type="text" value="Sales Representative"/> ⓘ
Role Name as displayed on reports	<input type="text"/>

1. Similarly Create 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 Details App

An App where the objects will be displayed

Activity :- 1

1. From Setup>> Go to App Manager and click on New Lightning App and Name it 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.

App Details

* App Name ⓘ

Property Details

* Developer Name ⓘ

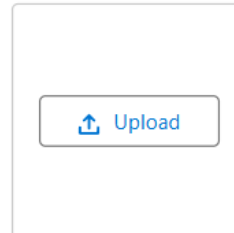
Property_Details

Description ⓘ

Enter a description...

App Branding

Image ⓘ



Primary Color Hex Value ⓘ

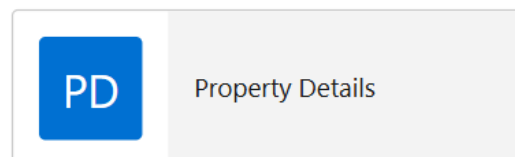


#0070D2

Org Theme Options

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

App Launcher Preview



Create Profiles

Create profiles as per business requirement

Creating Customer Profile :-

1. From Setup? Go to Profiles and Clone (standard platform) Salesforce Platform User and Name it "Customer".
2. Uncheck all the Custom Objects and Check only Property Details From Custom App Settings.
3. Also Remove all the Standard 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.

Setup Home Object Manager

Search 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. [View de.Lchopet2](#)

Standard Object	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Active Scratch Orgs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Data Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Tests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Testings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Phones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Standard Object	Read	Create	Edit	Delete	View All	Modify All
Contact Point Type Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D&B Companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Legal Bases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Purposes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nonresponse Registries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scratch Org Infos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

Custom Object	Read	Create	Edit	Delete	View All	Modify All
Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Property	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Custom Object	Read	Create	Edit	Delete	View All	Modify All
Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Timeout After: 2 hours of inactivity

Session Security Level Required at Login: High

Creating Manager Profile :-

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

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Active Scratch Orgs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Authorization Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Data Uses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Texts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Operations	<input type="checkbox"/>					
Business Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Phones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Contact Point Type Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DAB Companies	<input type="checkbox"/>					
Data Use Legal Bases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Purposes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input type="checkbox"/>	<input type="checkbox"/>				
Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>				<input type="checkbox"/>	
Namespace Registries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Party Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Scratch Org Infos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Sellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Property	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After:

Session Security Level Required at Login:

Create a Check Box field 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"

User Edit
Executive [Help for this Page](#)

User Edit Save Save & New Cancel

General Information Required Information

First Name		Role	Sales Executive
Last Name	Executive	User License	Salesforce
Alias	exec	Profile	System Administrator
Email	dup@rom.com	Active	<input checked="" type="checkbox"/>
Username	dup@rom.com	Marketing User	<input type="checkbox"/>
Nickname	User173217079617719380	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>

User: 2

1. Go to Setup >> Administration >> Users >> New User
2. Last Name >> Manager
3. Role >> Sales Manager
4. License >> Salesforce Platform
5. Profile >> Manager
6. Save

User Edit
Manager [Help for this Page](#)

User Edit Save Save & New Cancel

General Information Required Information

First Name		Role	Sales Manager
Last Name	Manager	User License	Salesforce Platform
Alias	mana	Profile	Manager
Email	dup1@rom.com	Active	<input checked="" type="checkbox"/>
Username	dup1@rom.com	Marketing User	<input type="checkbox"/>
Nickname	User173217096856966941	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>

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 verified check box is "Unchecked"
7. Save

User Edit
Customer [Help for this Page](#)

User Edit Save Save & New Cancel

General Information Required Information

First Name	<input type="text"/>	Role	<input type="text" value="Customer"/>
Last Name	<input type="text" value="Customer"/>	User License	<input type="text" value="Salesforce Platform"/>
Alias	<input type="text" value="cust"/>	Profile	<input type="text" value="Customer"/>
Email	<input type="text" value="dup3@rom.com"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text" value="dup3@rom.com"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text" value="User173217103019570501"/>	Offline User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	<input type="text" value="--None--"/>
		Data.com Monthly Addition Limit	<input type="text" value="300"/>
		Accessibility Mode (Classic Only)	<input type="checkbox"/>

User: 4

1. Go to 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

User Edit
Customer2 Help for this Page ?

User Edit Save Save & New Cancel

General Information ! Required Information

First Name	<input type="text"/>	Role	<input type="text" value="Customer"/>
Last Name	<input type="text" value="Customer2"/>	User License	<input type="text" value="Salesforce Platform"/>
Alias	<input type="text" value="cust2"/>	Profile	<input type="text" value="Customer"/>
Email	<input type="text" value="dup4@rom.com"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text" value="dup4@rom.com"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text" value="User173217107925187308"/>	Offline User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	<input type="text" value="--None--"/>
		Data.com Monthly Addition Limit	<input type="text" value="300"/>
		Accessibility Mode (Classic Only)	<input type="checkbox"/>

Create an Approval Process for Property Object

An Approval process to approve or reject the records as according

Activity :- 1

1. From Setup >> Process Automation >> Approval Process
2. before proceeding we need to select property in the manage approval process
3. Process Name - Property Approval
4. Select 2 criteria -
 - Location - not equal to - blank,
 - Verified-Equals- false
5. Click next and "Next Automated Approver Determined By" Select Manager

6. From Record Editability Properties >> Click on Administrators OR the currently assigned approver can edit records during the approval process.
7. From Step 5: Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.

Approval Process Edit:
Property Approval

Step 5. Select Fields to Display on Approval Page Layout

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields		Selected Fields
Created By	Add Remove	Property
Last Modified By		Owner
Verified		Location
		Property Name
		Type

Up
Down

[Click here to view an example](#)

Click Next and Select the initial Submitters >>

1. Owner >> Property Owner
2. Roles >> Sales Manager

Save

After saving we are directed to approval steps and we need to do as follows

Add an approval step name "Executive Approval "

Click next and select the Approver as "Sales Executive" and "Save"

Add One field Update as "Verified Property"

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

Add One field Update as "UnVerified Property"

1. Select Object >> Property
2. Field to Update >> Verified
3. Field Data Type >> CheckBox
4. Select CheckBox Option as "False"
5. Save.

Activate the Approval Process.

Approval Processes
Property: Property Approval
[Help for this Page](#)

[Back to Approval Process List](#)

Process Definition Detail
Edit
Clone
Delete
Activate

Process Name	Property Approval	Active	<input type="checkbox"/>
Unique Name	Property_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	(Property: Location NOTEQUAL TO 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	Vamsi Krishna, 21/11/2024, 12:13 pm	Modified By	Vamsi Krishna, 21/11/2024, 12:23 pm

Initial Submission Actions
Add Existing
Add New

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps
New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Executive Approval			User:Executive	Final Rejection

Create a Record trigger flow to submit the Approval Process Automatically

A flow that can submit the records directly for approval

Activity :- 1

1. From Setup >> Search for Flows >> Click On New and Select "Record Trigger Flow".
2. Select Object >> Property
3. Select "Trigger the flow when" >> "A record is created"
4. Set Entry Conditions >> "None"
5. Add a "Action" >> "Submit for Approval"
6. Give Label >> Approval for property
7. Record Id >> {!\$Record.Id}
8. Done

Save the Flow and Give label as "Property Approval" and "Activate"

Last saved on 17/11/2024, 11:49 am **Active** [Run](#) [Debug](#) [View Tests](#) [Save As New Version](#) [Save](#) [Deactivate](#)

```

graph TD
    Start((Start)) --> RunImmediately((Run Immediately))
    RunImmediately --> SubmitForApproval[Submit for Approval]
    SubmitForApproval --> End((End))

```

Submit for Approval

* Label

* API Name ⓘ

Description

Submit for Approval ⓘ
submit-submit

Use values from earlier in the flow to set the inputs for the "Submit for Approval" core action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

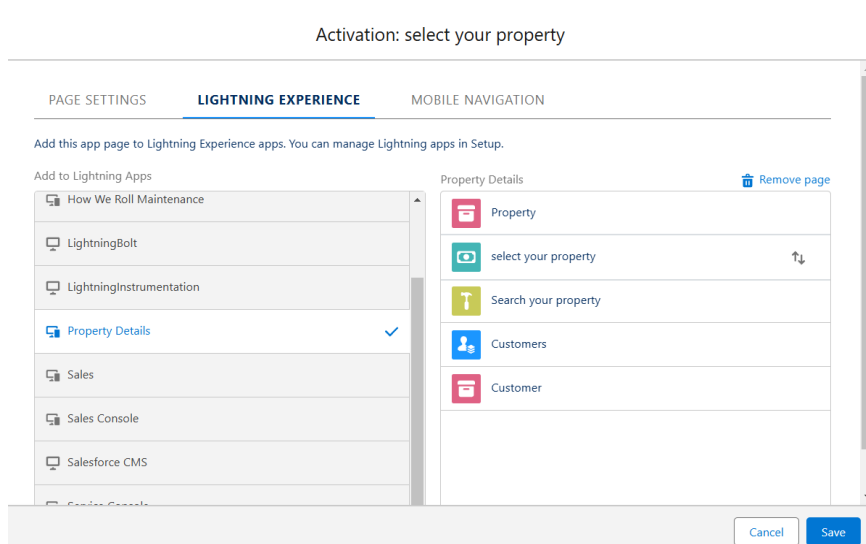
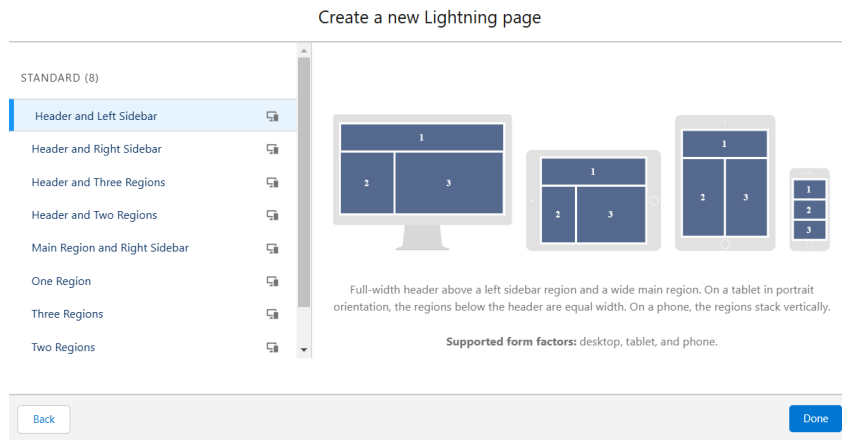
A_a * Record ID ⓘ

Create an App Page

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

Activity :- 1

1. From Setup >> Go to Lightning App Builder >> Click on New >> Select App Page and
2. Click on Next
3. Give Label as "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 Setting select page activation as "Activate for all Users".
7. From Lightning Experience Click on "Property Details" and click on Add Page".
8. Then Click on "Save"



Create a LWC Component

Create an LWC Component 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"

Activity :- 1

1. Create an Apex Class and make it aura enabled and name it "PropertHandler_LWC".

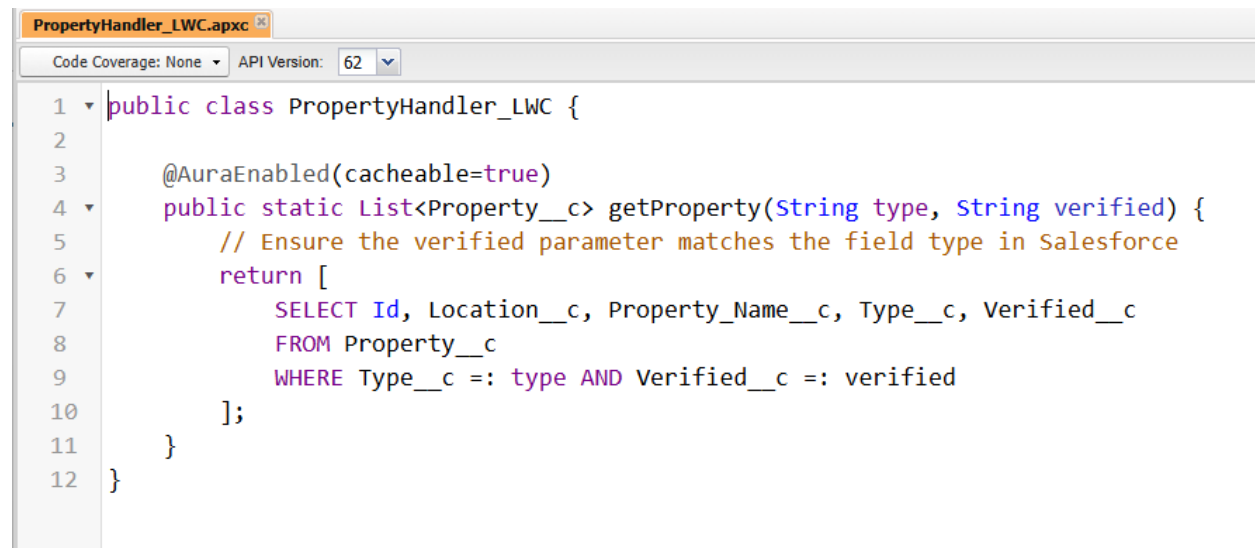
Code:

```
public class PropertyHandler_LWC {
    @AuraEnabled(cacheable=true)
    public static List<Property__c> getProperty(String type, String verified) {
        // Ensure the verified parameter matches the field type in Salesforce
        return [
            SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c
            FROM Property__c
```

```

        WHERE Type__c =: type AND Verified__c =: verified
    };
}
}

```



```

PropertyHandler_LWC.apxc
Code Coverage: None API Version: 62
1 public class PropertyHandler_LWC {
2
3     @AuraEnabled(cacheable=true)
4     public static List<Property__c> getProperty(String type, String verified) {
5         // Ensure the verified parameter matches the field type in Salesforce
6         return [
7             SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c
8             FROM Property__c
9             WHERE Type__c =: type AND Verified__c =: verified
10        ];
11    }
12 }

```

2. Create a Lightning Web Component in your VsCode, and (ctrl+shift +P) and click on authorize an org.
3. Enter your login ic and password to authorize your org.
4. Now (ctrl+shift +P) and Create a lightning Web Component and Name it Anything you want to.
5. In your Html File, write this code

Code:

```

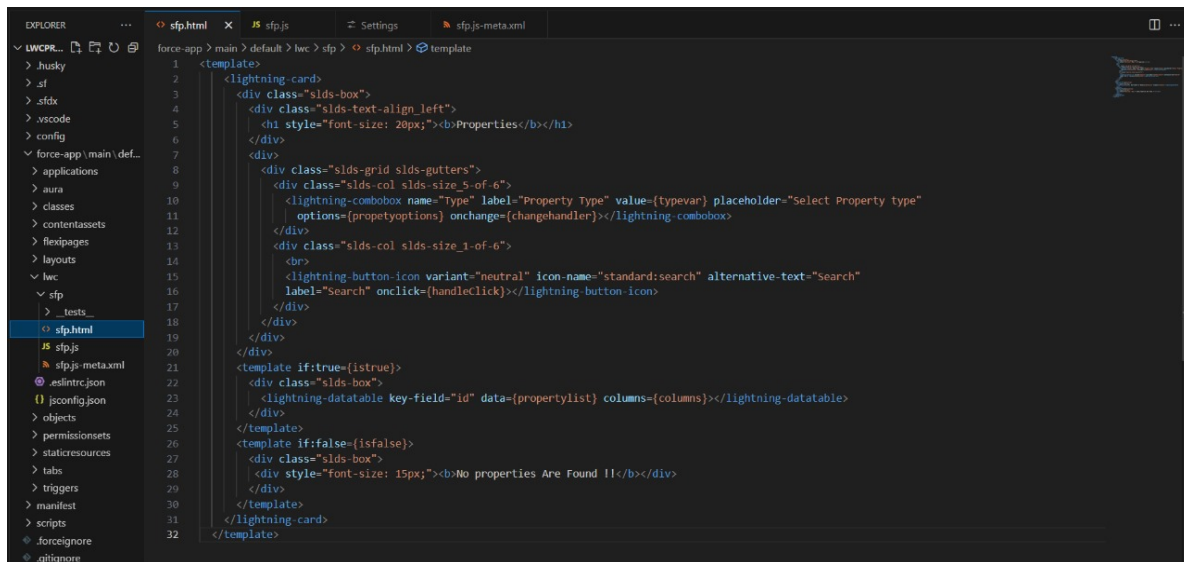
<template>
<lightning-card>
<div class="slds-box">
<div class="slds-text-align_left">
<h1 style="font-size: 20px;"><b>Properties</b></h1>
</div>
<div>
<div class="slds-grid slds-gutters">
<div class="slds-col slds-size_5-of-6">
<lightning-combobox name="Type" label="Property Type" value={typevar} placeholder="Select
Property type"
options={propetyoptions} onchange={changehandler}></lightning-combobox>
</div>
<div class="slds-col slds-size_1-of-6">

```

```

        <br>
        <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={istru}>
    <div class="slds-box">
        <lightning-datatable key-field="id" data={propertylist} columns={columns}></lightning-
datatable>
    </div>
</template>
<template if:false={isfalse}>
    <div class="slds-box">
        <div style="font-size: 15px;"><b>No properties Are Found !!</b></div>
    </div>
</template>
</lightning-card>
</template>

```



6. In your Js File, write this code

Code:

```

import { LightningElement, api, track, wire } from 'lwc';
import getProperty from "@salesforce/apex/PropertyHandler_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 = [
    { 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) {
    console.log(event.target.value);
    this.typevar = event.target.value;
  }
  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);
      })
  }
}

```

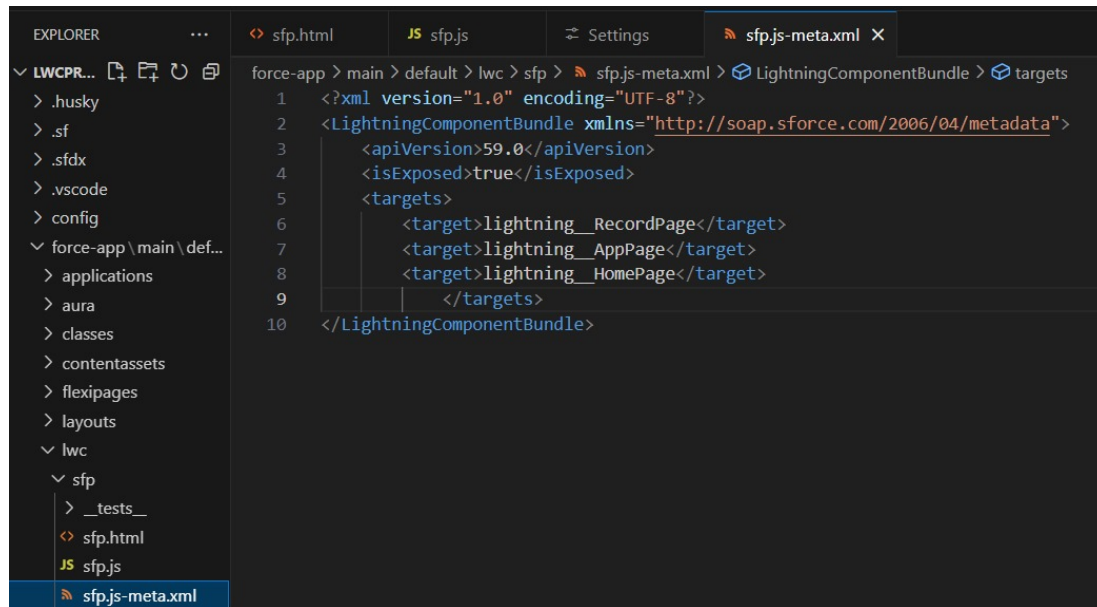
```
    if (result != null && result.length != 0) {  
        this.istrue = true;  
        this.propertylist = result;  
        console.log(this.verifiedvar);  
        console.log(this.typevar)  
    } else {  
        this.isfalse = false;  
        this.istrue = false;  
    }  
})  
.catch((error) => {  
    console.log(error)  
})  
}  
}
```

7. In your Metafile, give your targets to deploy the component.

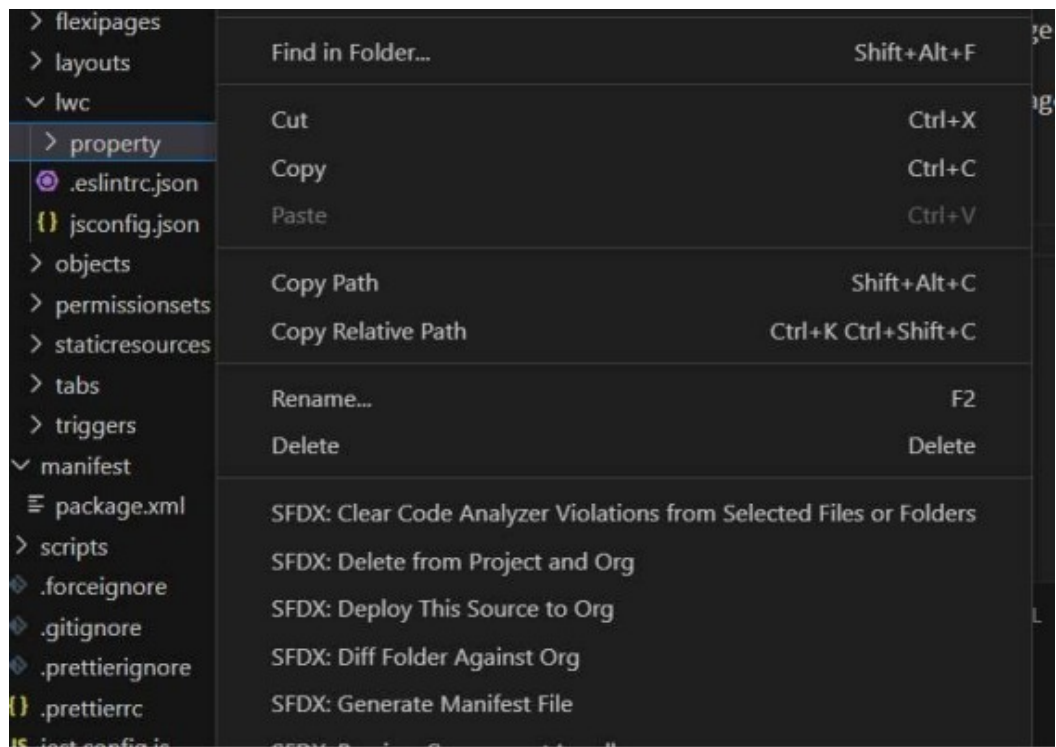
Code:

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



8. After saving all the three codes, right click and deploy this component to the org.

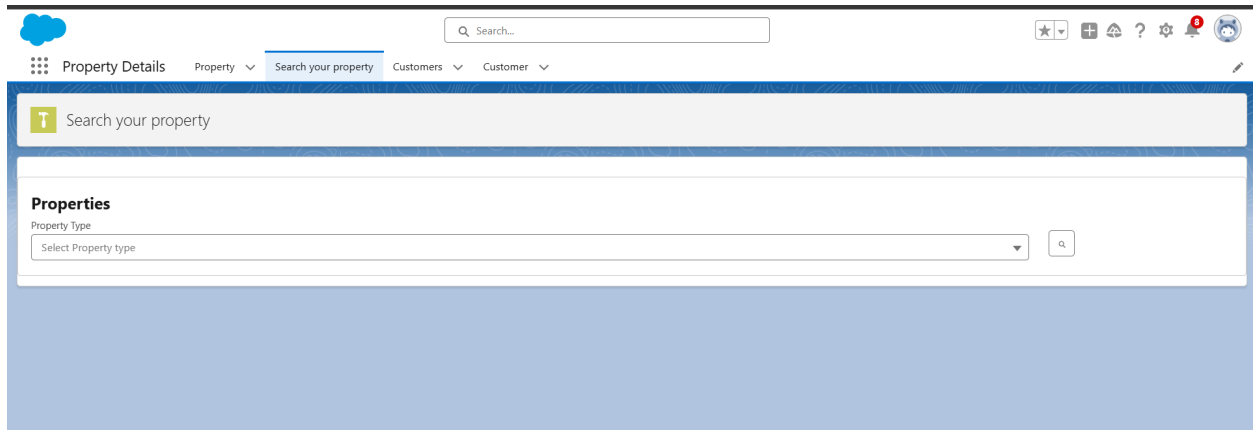


Drag this Component to your App Page

Adding the Component to your Page

Activity :- 1

1. From Setup >> Go to App Launcher >> Search for Property Details
2. On this Page click on gear icon and click on Edit Page
3. After clicking on edit page it will be directed to app pages then
4. Drag the Component(properties) to your App Page and Save the Page.



Give Access of Apex Classes to Profiles

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

Activity :- 1

1. From Setup >> Search For Apex Classes >> Click on "Security" behind "PropertyHandler_LWC".
2. From Profiles Add "Manager" and "Customer" and "Save".



SETUP

Profiles

Enable Profile Access for Apex Class

PropertyHandler_LWC

Save

Cancel

Available Profiles

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Cross Org Data Proxy User
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User
- Customer Community Plus User
- Customer Community User
- Customer Portal Manager Custom

Add



Remove

Enabled Profiles

- Customer
- Manager
- System Administrator