Project Title

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

1. Project Overview

This project focuses on creating a **CRM solution in Salesforce** to streamline handling client property-related requirements. Designed to address the challenge of **efficiently managing client and property records**, the project aims to **enhance user experience and data accuracy** by automating data entry and approval processes. Through Salesforce's capabilities, this CRM solution will support real estate client management, providing a comprehensive approach to client interaction and property management.

2. Objectives

- **Business Goals**: To streamline the process of managing client records and property details, reducing manual work and minimizing errors.
- **Specific Outcomes**:
    - Automated record creation for client data through Jotform integration.
    - Structured property details app for clear data organization.
    - Automated approval process for property entries, ensuring data consistency.
    - Enhanced user role and profile management for security and access control.

3. Salesforce Key Features and Concepts Utilized

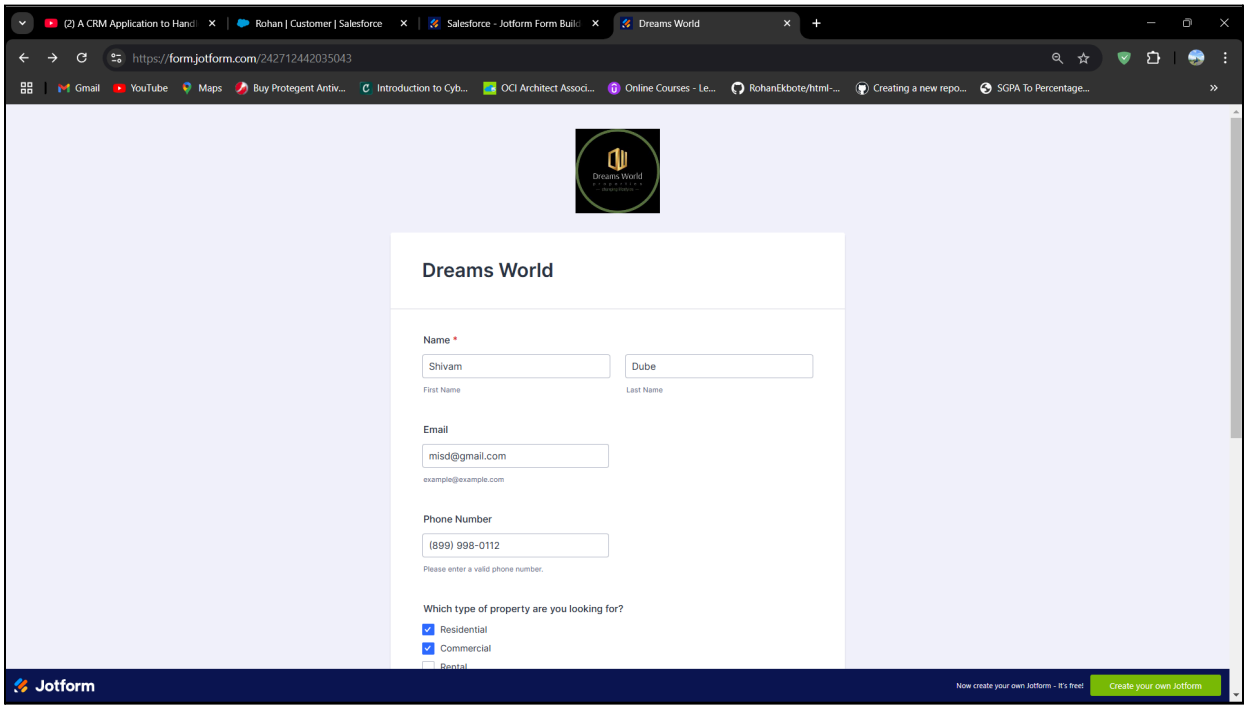
- **Jotform Integration**: Automatically creates customer records in Salesforce.
- **Custom Objects**: Property details and client information managed within custom Salesforce objects.
- **Approval Process**: Automated process for approving property records.
- **Record Trigger Flow**: Automates the submission of property records into the approval workflow.
- **Lightning Web Component (LWC)**: Custom component for property details, embedded in the App Page.
- **Apex Classes**: Programmatic control over business logic, secured through profile access.

4. Detailed Steps to Solution Design

- **Data Model**:
    - Custom objects: Client and Property with fields for contact information, property details, and approval status.

- **User Interface**:
    - Created App Page for property management.
    - LWC to display and manage property details, accessible on the App Page.
    - Integrated Jotform on the client website to feed data directly into Salesforce.
- **Business Logic**:
    - Apex triggers for automation and error-checking.
    - Record trigger flow to initiate the property approval process automatically.

FORM FILLING AND RECORD SAVING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Salesforce - Jotform Form Build
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Dube
Last Name
Email
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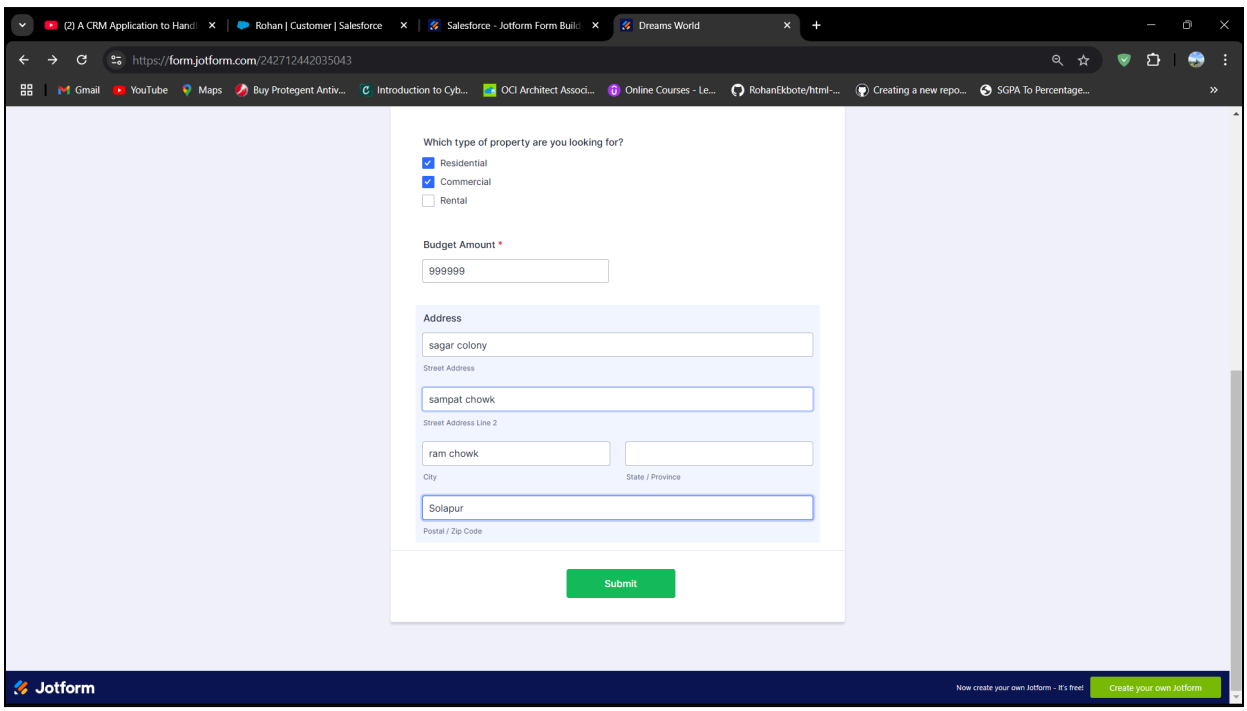
example@example.com
Phone Number
(899) 998-0112
Please enter a valid phone number.
Which type of property are you looking for?
Residential
Commercial
Rental
Jotform
Now create your own Jotform - It's free!
Create your own Jotform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Introduction to Cyb...
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Online Courses - Le...
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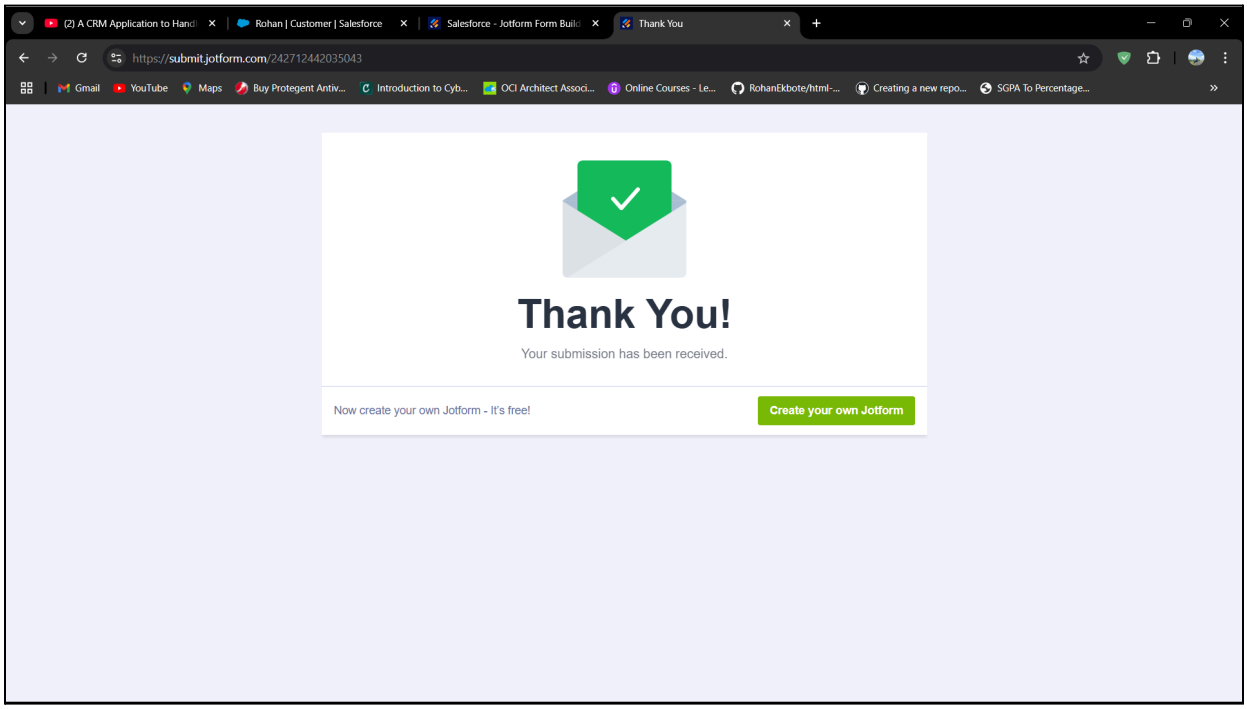
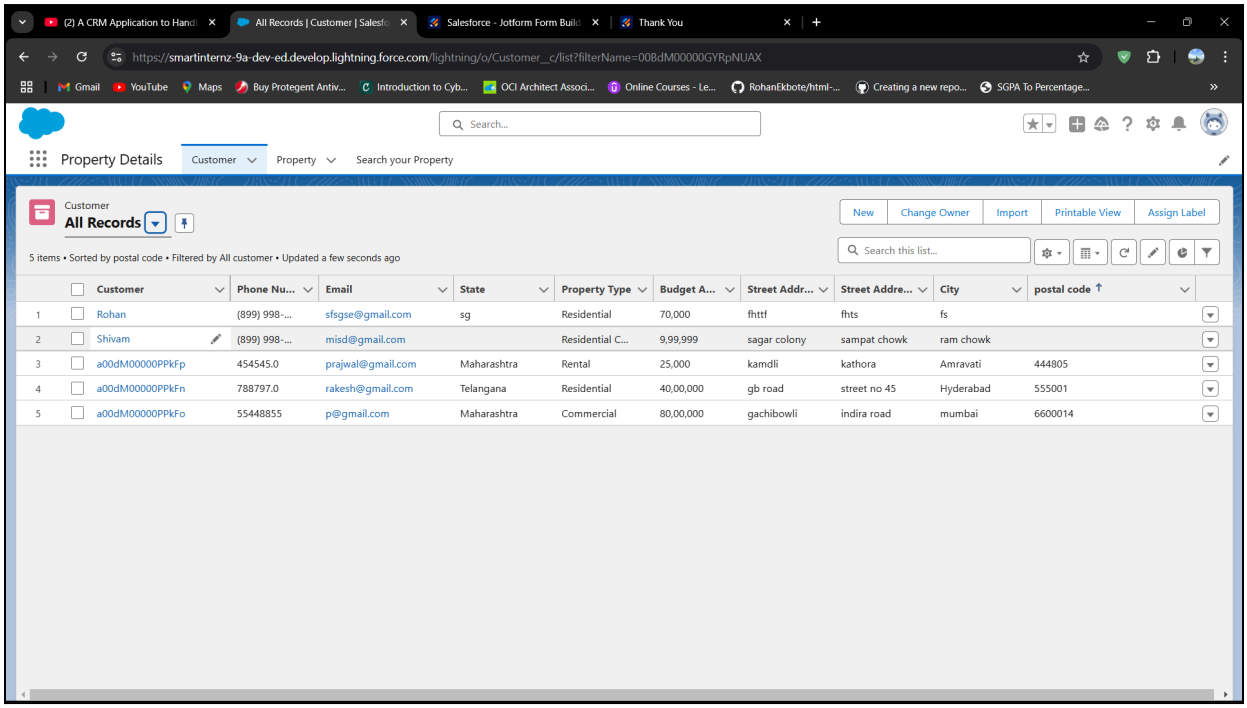
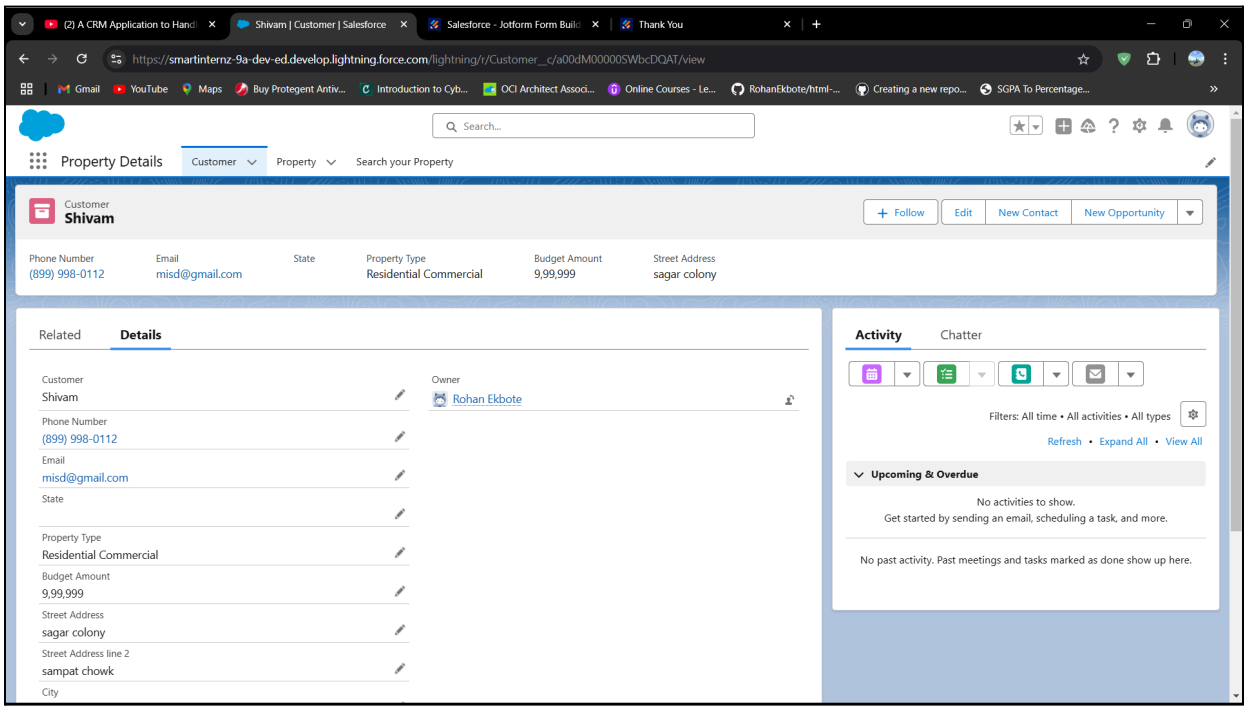
Creating a new repo...
SGPA To Percentage...
Which type of property are you looking for?
Residential
Commercial
Rental
Budget Amount *
999999
Address
sagar colony
Street Address
sampat chowk
Street Address Line 2
ram chowk
City
State / Province
Solapur
Postal / Zip Code
Submit
Jotform
Now create your own Jotform - It's free!
Create your own Jotform

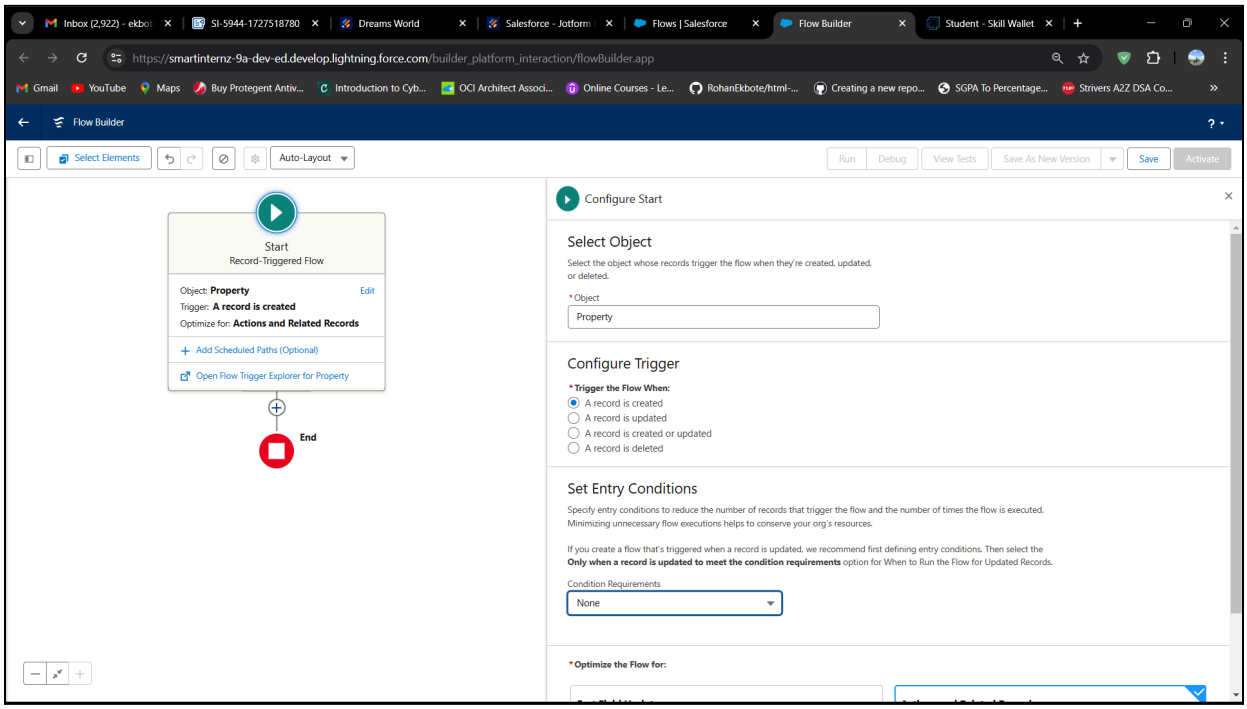


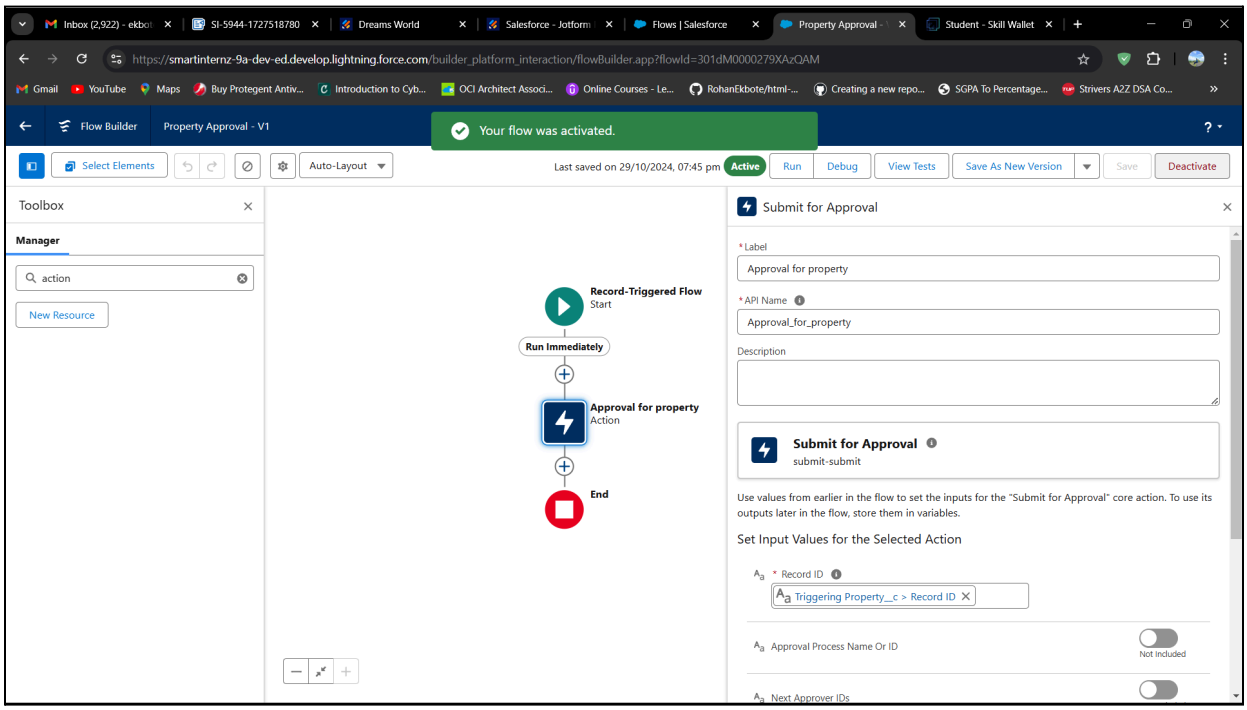


	Customer	Phone Nu...	Email	State	Property Type	Budget A...	Street Addr...	Street Addre...	City	postal code
1	Rohan	(899) 998-...	sfsgse@gmail.com	sg	Residential	70,000	fhttf	fhts	fs	
2	Shivam	(899) 998-...	misd@gmail.com		Residential C...	9,99,999	sagar colony	sampat chowk	ram chowk	
3	a00dM00000PPkFp	454545.0	prajwal@gmail.com	Maharashtra	Rental	25,000	kamdli	kathora	Amravati	444805
4	a00dM00000PPkFn	788797.0	rakesh@gmail.com	Telangana	Residential	40,00,000	gb road	street no 45	Hyderabad	555001
5	a00dM00000PPkFo	55448855	p@gmail.com	Maharashtra	Commercial	80,00,000	gachibowli	indira road	mumbai	6600014

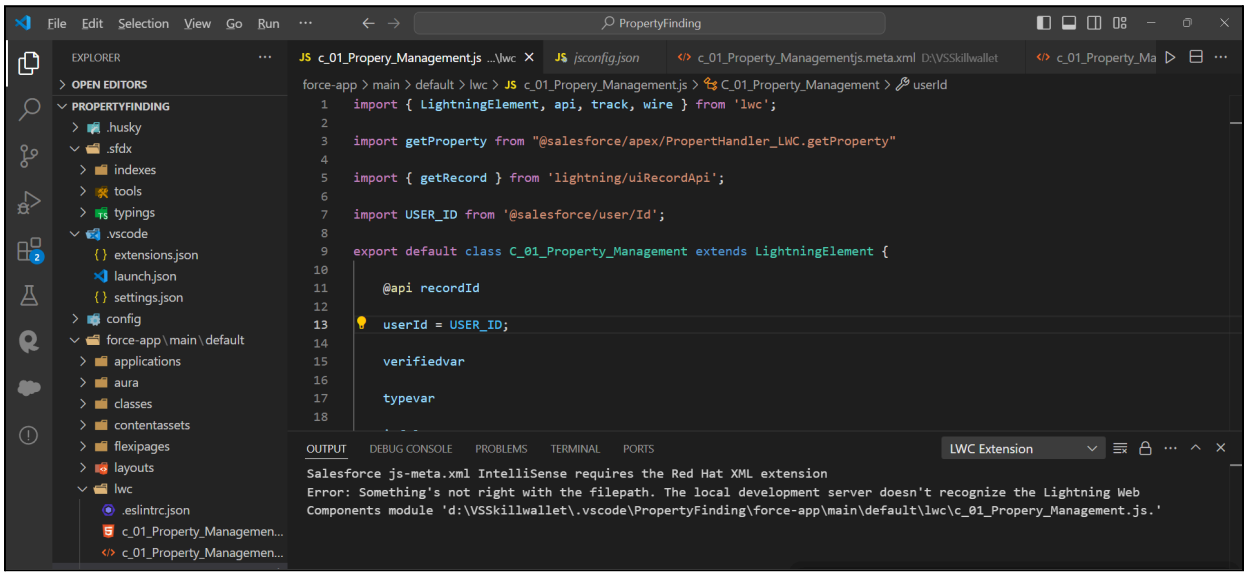

Property Details
Customer
Property
Search your Property
Customer
Shivam
Follow
Edit
New Contact
New Opportunity
Phone Number
(899) 998-0112
Email
misd@gmail.com
State
Property Type
Residential Commercial
Budget Amount
9,99,999
Street Address
sagar colony
Related
Details
Customer
Shivam
Owner
Rohan Ekbote
Phone Number
(899) 998-0112
Email
misd@gmail.com
State
Property Type
Residential Commercial
Budget Amount
9,99,999
Street Address
sagar colony
Street Address line 2
sampat chowk
City
Activity
Chatter
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.

FLOW


Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Start
Record-Triggered Flow
Object: Property
Edit
Trigger: A record is created
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Property
End
Configure Start
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
* Object
Property
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:



LWC COMPONENT



5. Testing and Validation

- **Unit Testing**: Apex Classes and Triggers tested for accurate record creation and approval process.
- **User Interface Testing**: Validated LWC component display, data accuracy, and usability on the App Page.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

- Automated client record creation from Jotform submission, eliminating manual data entry.
- Property approval process automation to ensure only verified property records are accessible.
- Property details viewing and management in a custom LWC within the Salesforce App Page, enhancing client interaction.

7. Conclusion

Summary of Achievements: This project successfully implemented a CRM solution for client and property management. Key achievements include automated data entry, streamlined property record approval, secure access management, and a user-friendly interface for property interaction.