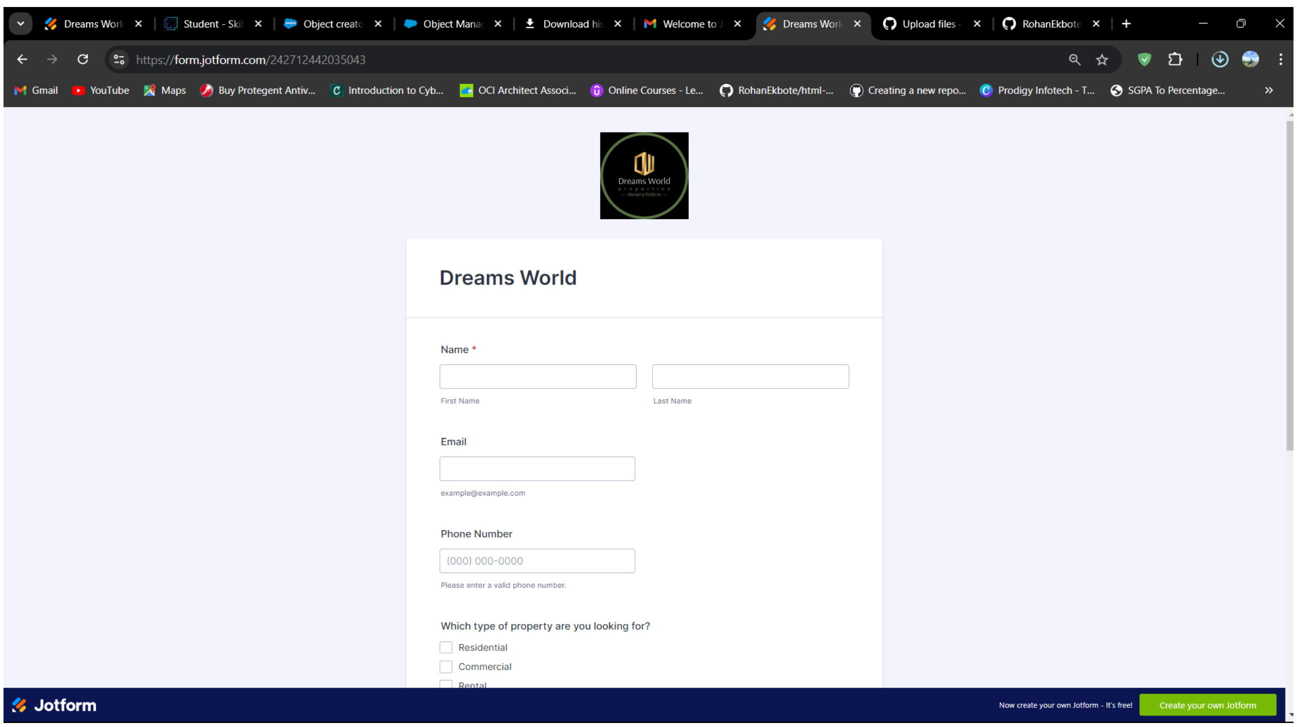
Project Review/Documentation link (Google Docs):
https://docs.google.com/document/d/17kQWiBiKHZzcetYR2rnzPZ-R5ETMLhTUZgKlKsz-KsY/edit?usp=sharing

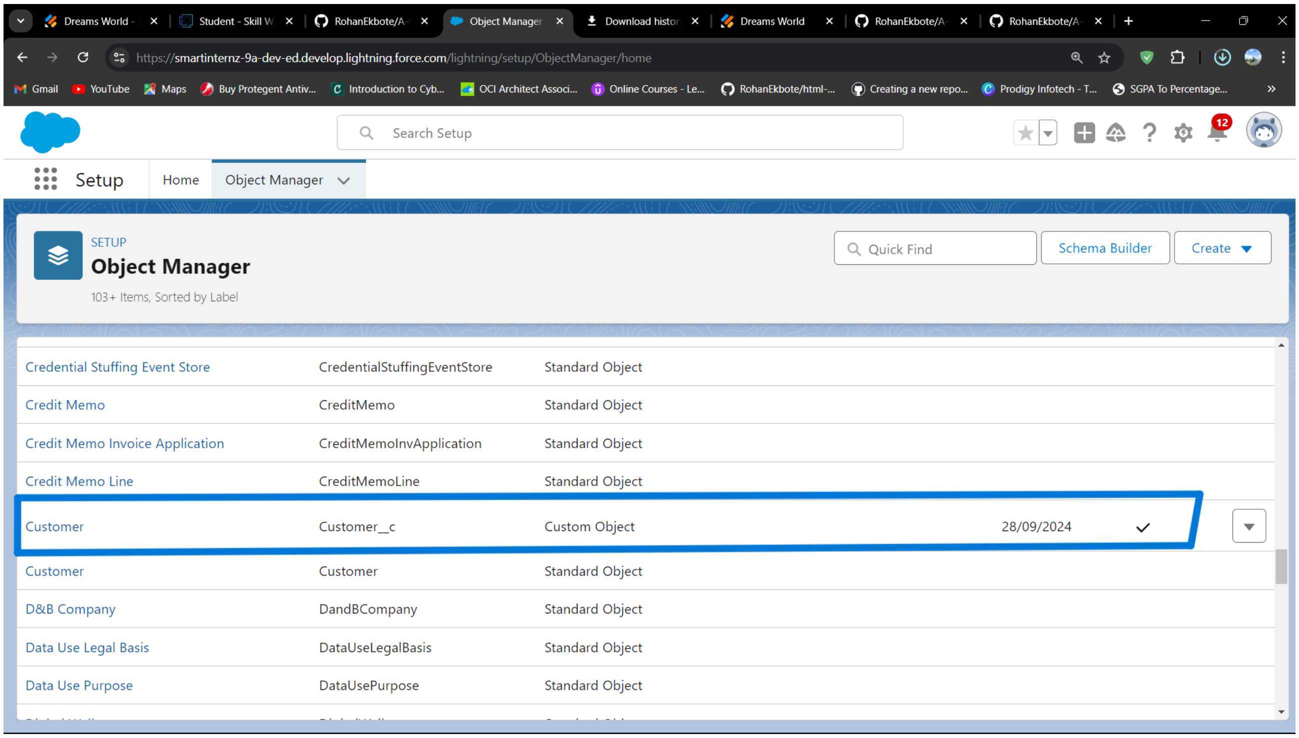
Project Title : **A CRM Application to Handle the Clients and their property Related Requirements**

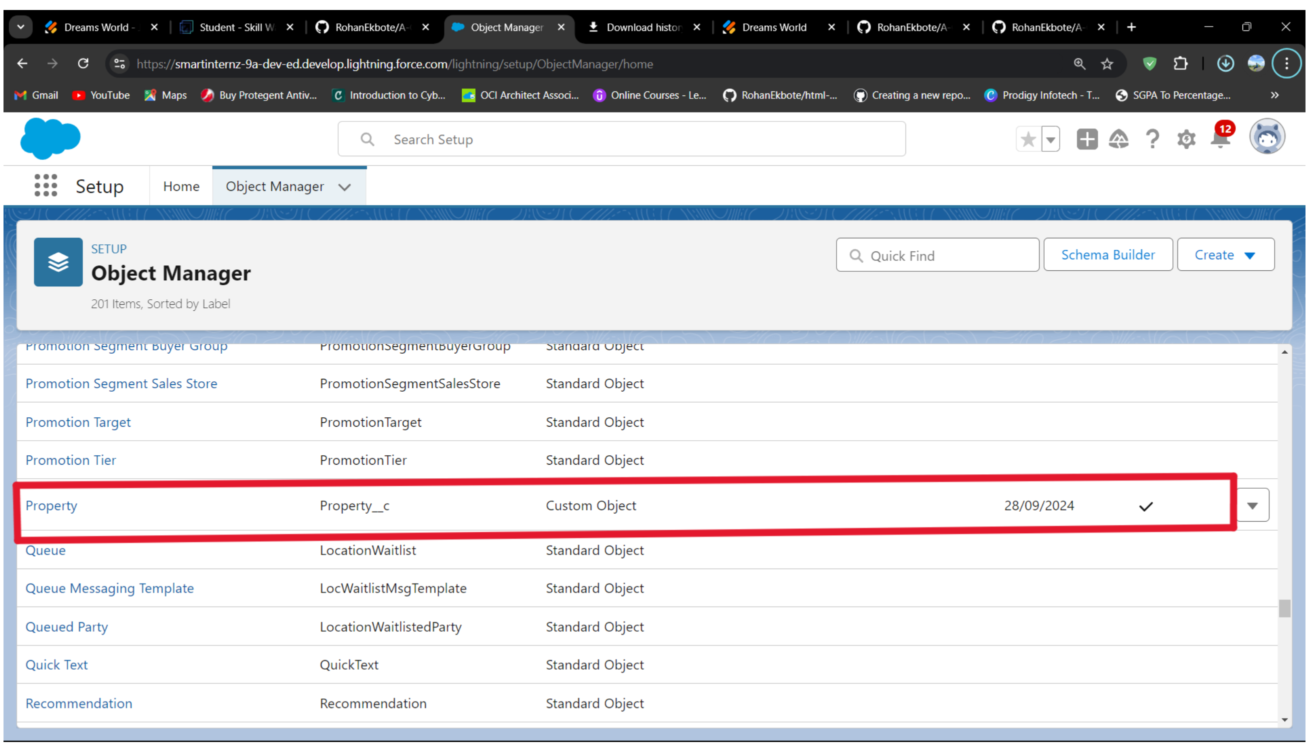
Steps with Screenshots :-

1. Jotform - https://form.jotform.com/242712442035043

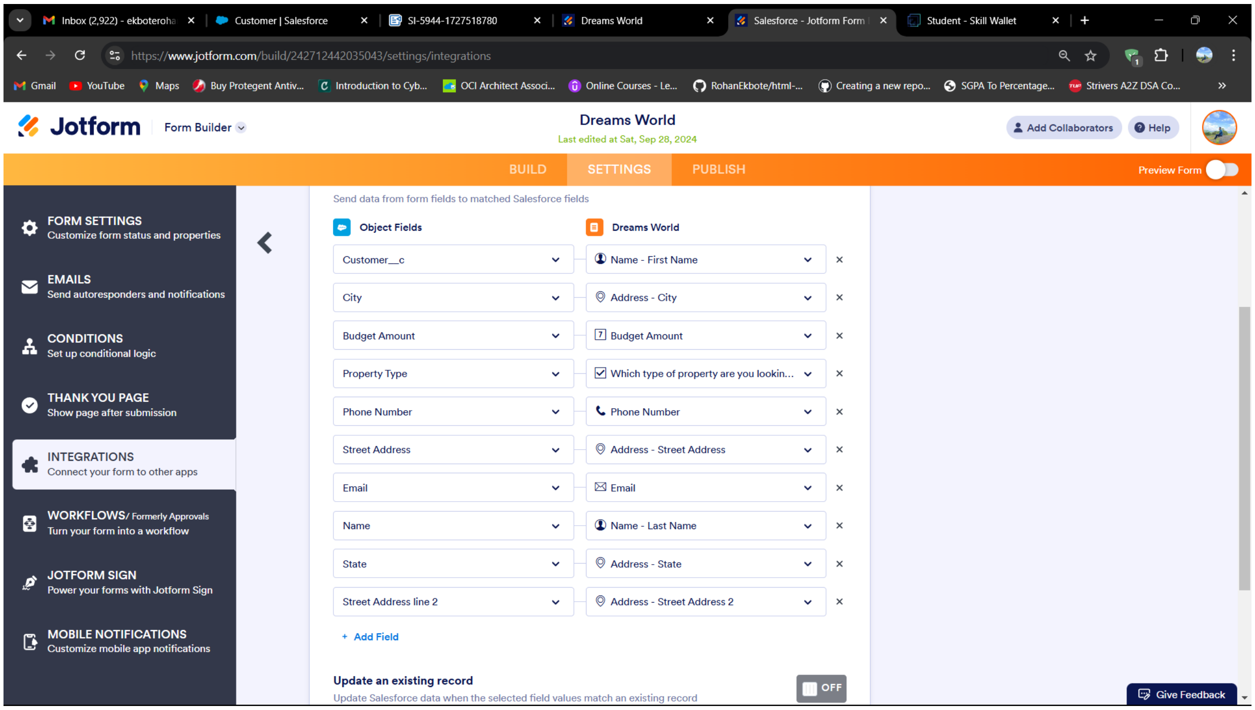


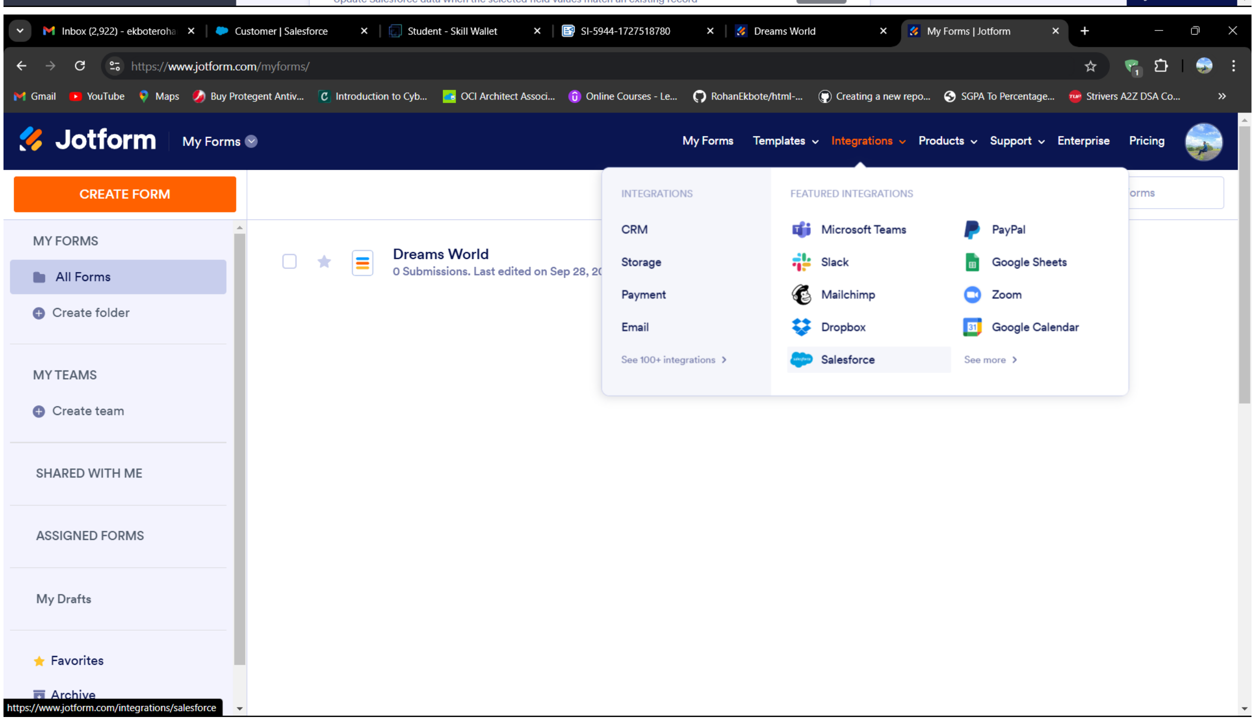
2.Customer & Property Object Created

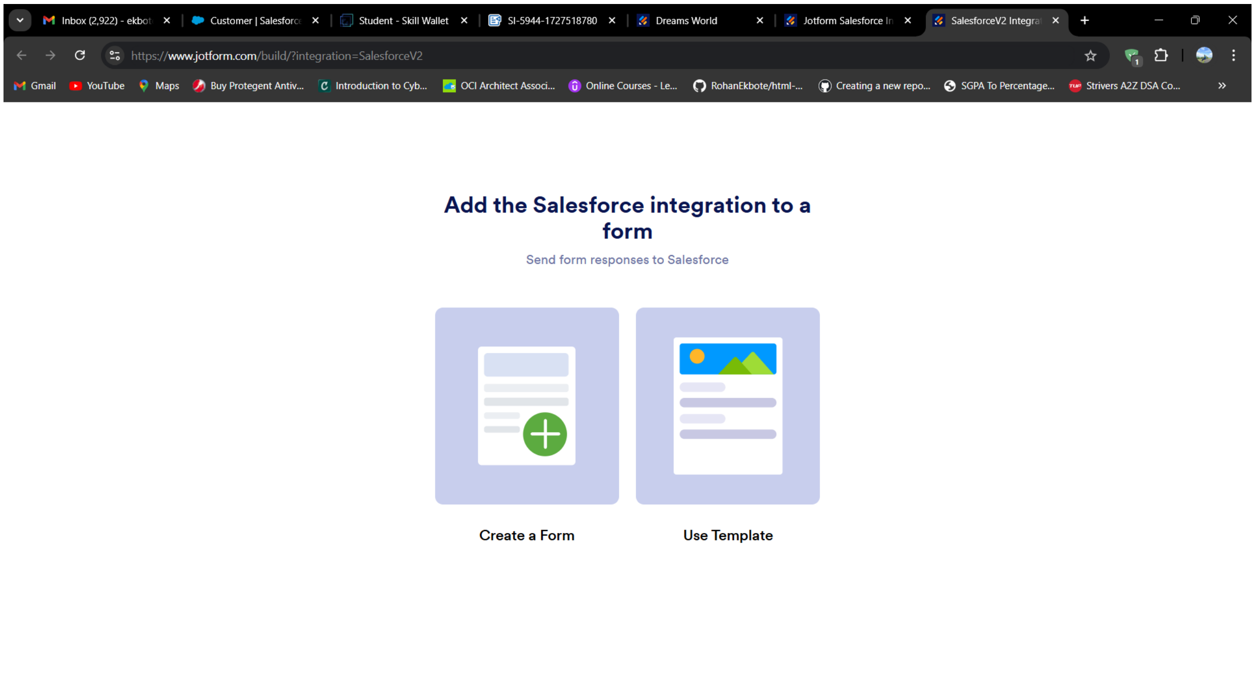


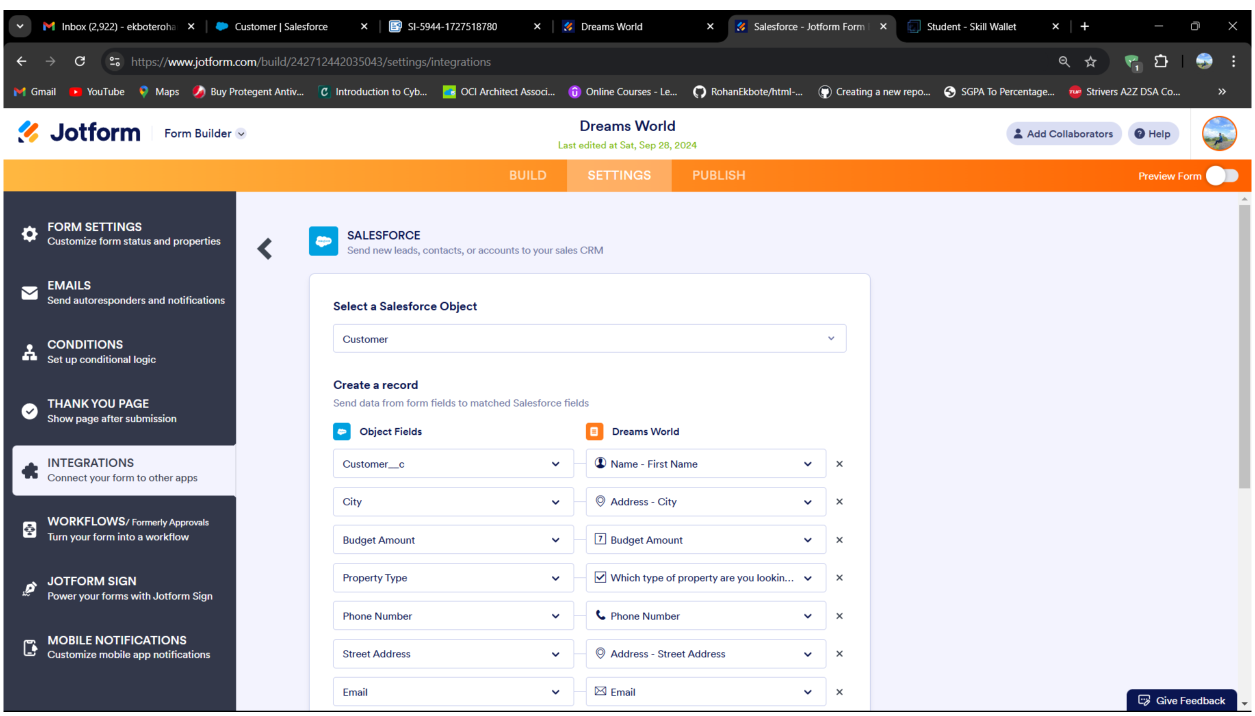


3. Integrate Jotform with Salesforce Platform

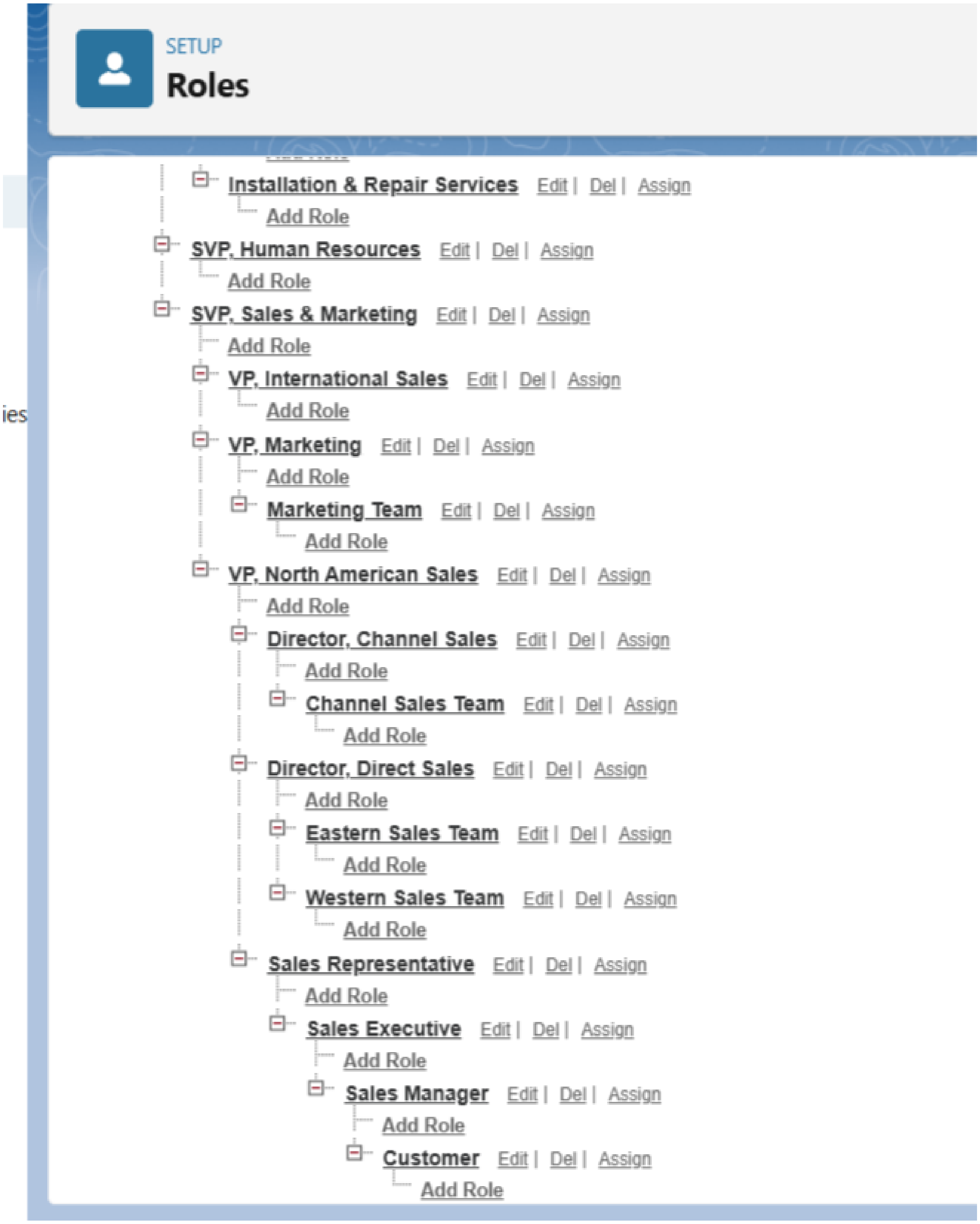




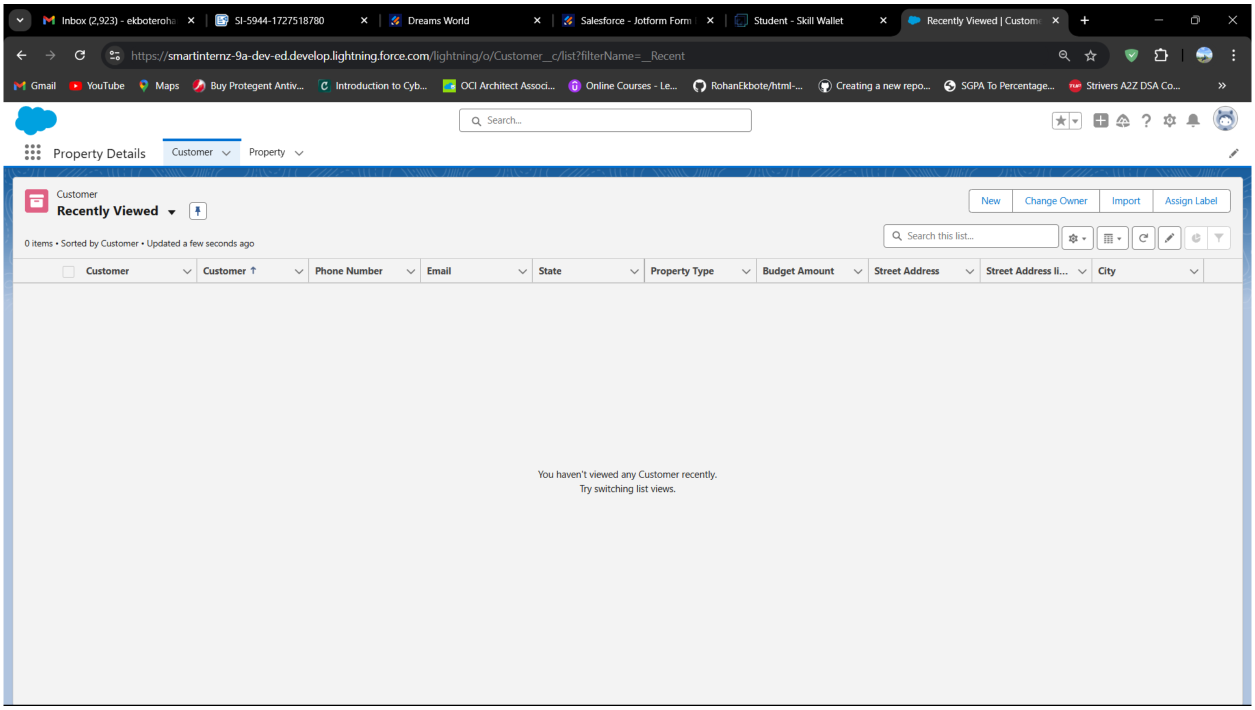

https://www.jotform.com/build/?integration=SalesforceV2
Add the Salesforce integration to a form
Send form responses to Salesforce
Create a Form
Use Template

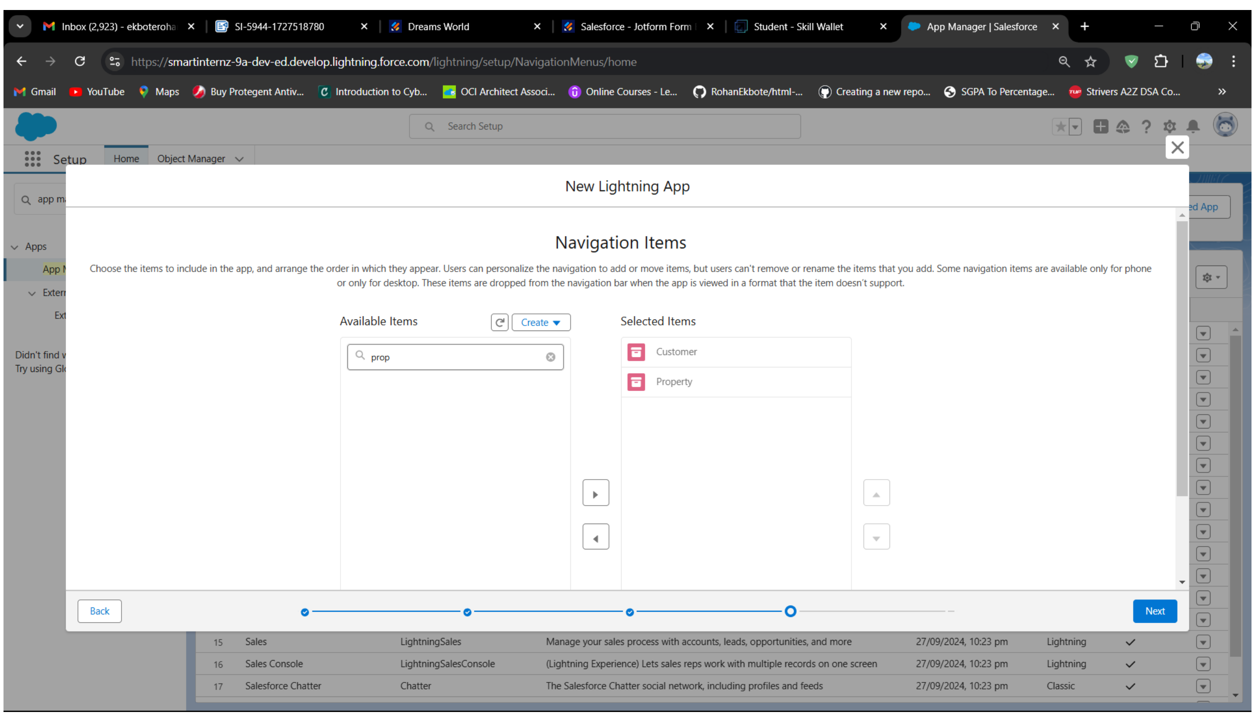

https://www.jotform.com/build/242712442035043/settings/integrations
Jotform
Form Builder
Dreams World
Last edited at Sat, Sep 28, 2024
Add Collaborators
Help
BUILD
SETTINGS
PUBLISH
Preview Form
FORM SETTINGS
Customize form status and properties
EMAILS
Send autoresponders and notifications
CONDITIONS
Set up conditional logic
THANK YOU PAGE
Show page after submission
INTEGRATIONS
Connect your form to other apps
WORKFLOWS/ Formerly Approvals
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 a Salesforce Object
Customer
Create a record
Send data from form fields to matched Salesforce fields
Object Fields
Dreams World
Customer__c
Name - First Name
City
Address - City
Budget Amount
Budget Amount
Property Type
Which type of property are you lookin...
Phone Number
Phone Number
Street Address
Address - Street Address
Email
Email
Give Feedback

4. Create Roles

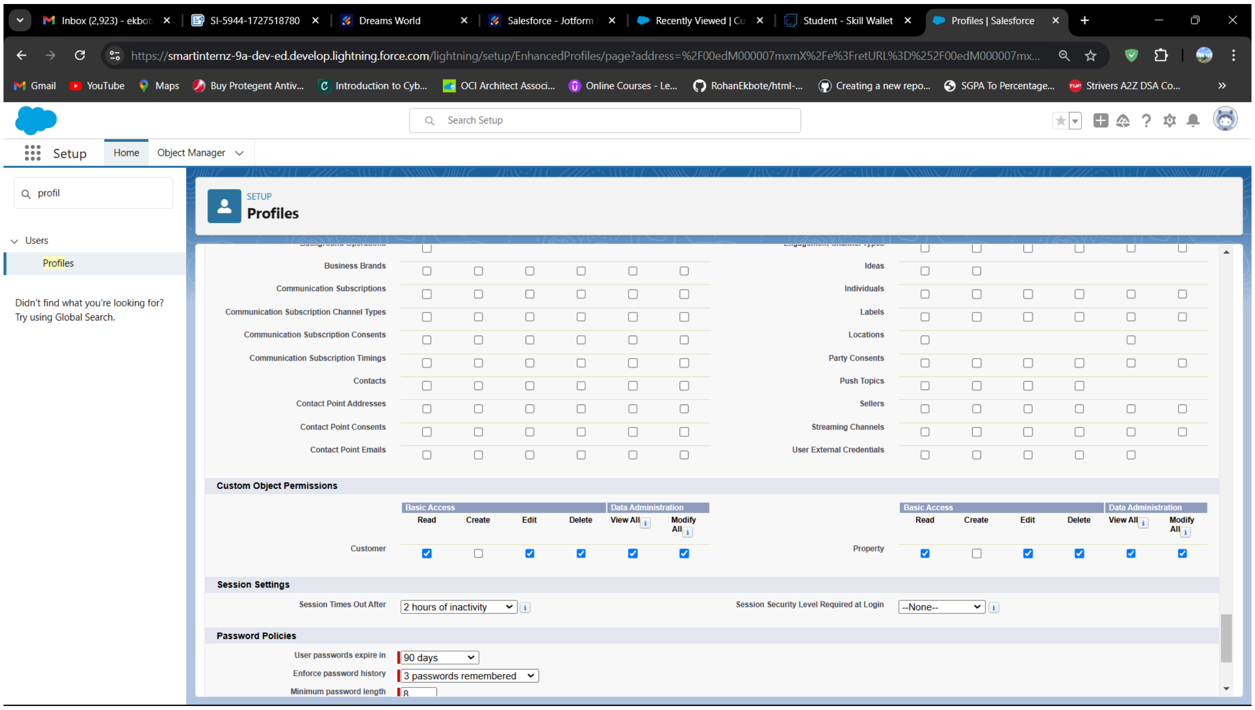


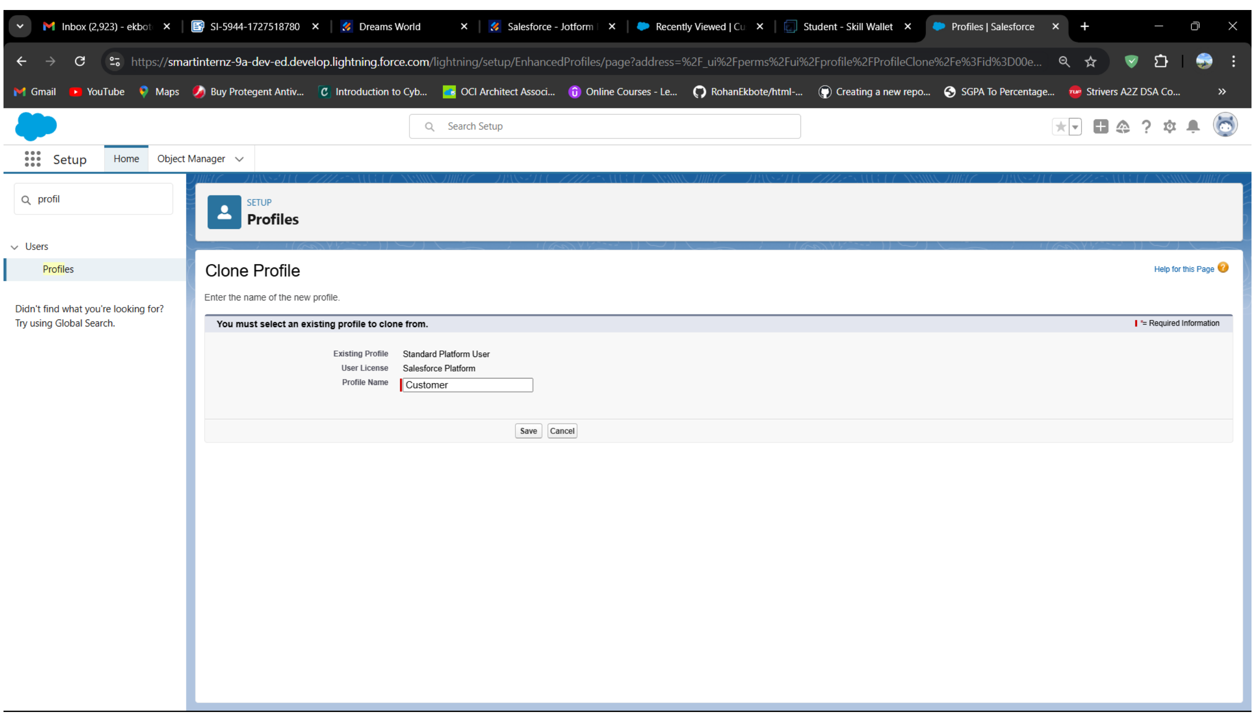
5. Create a Property Details App

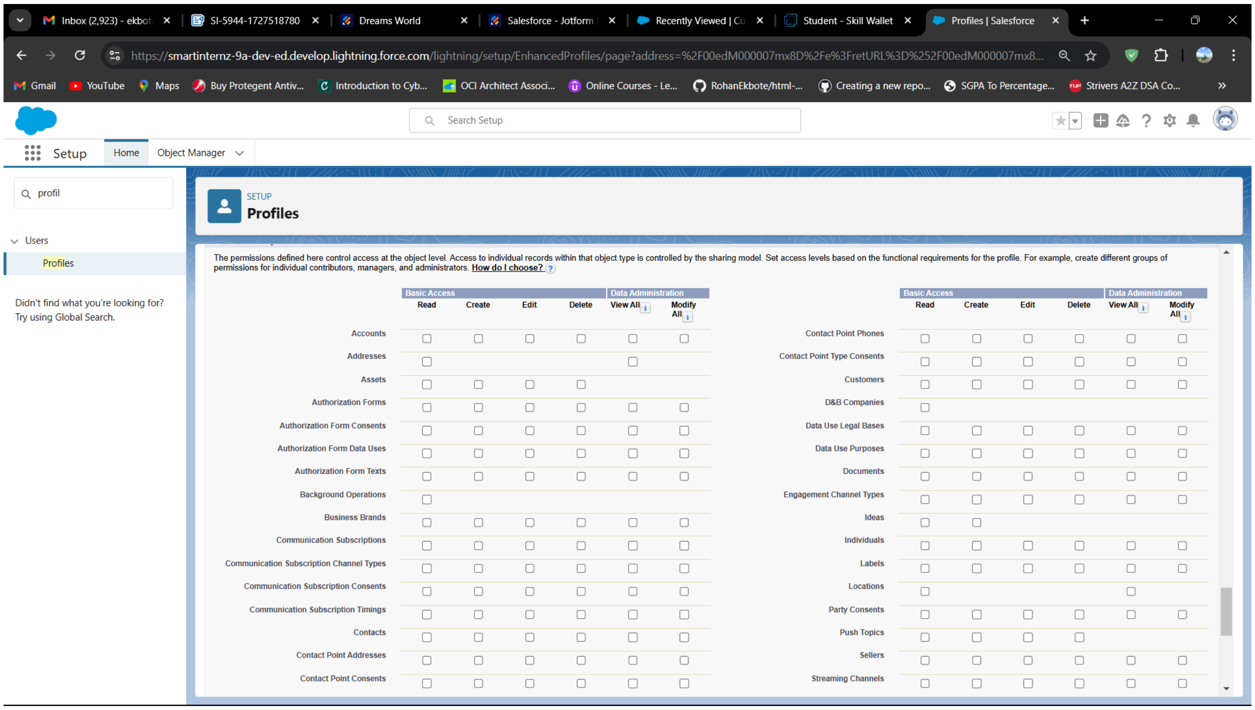




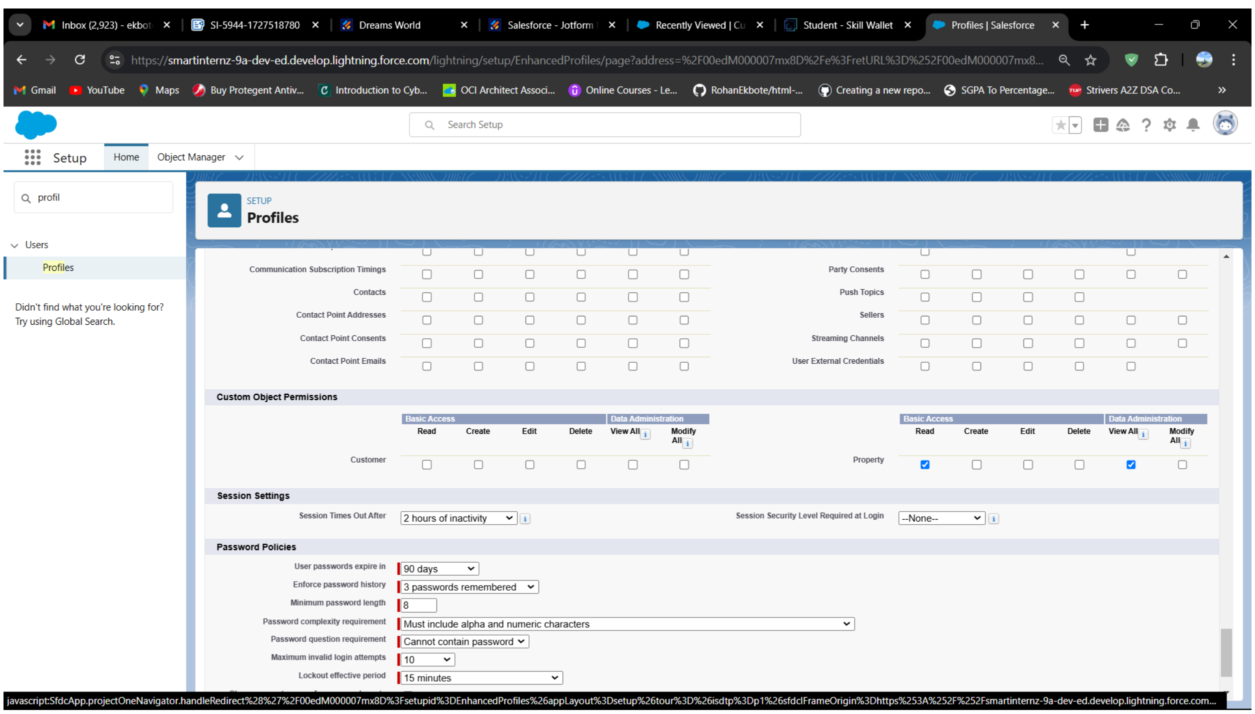
6. Create Profiles



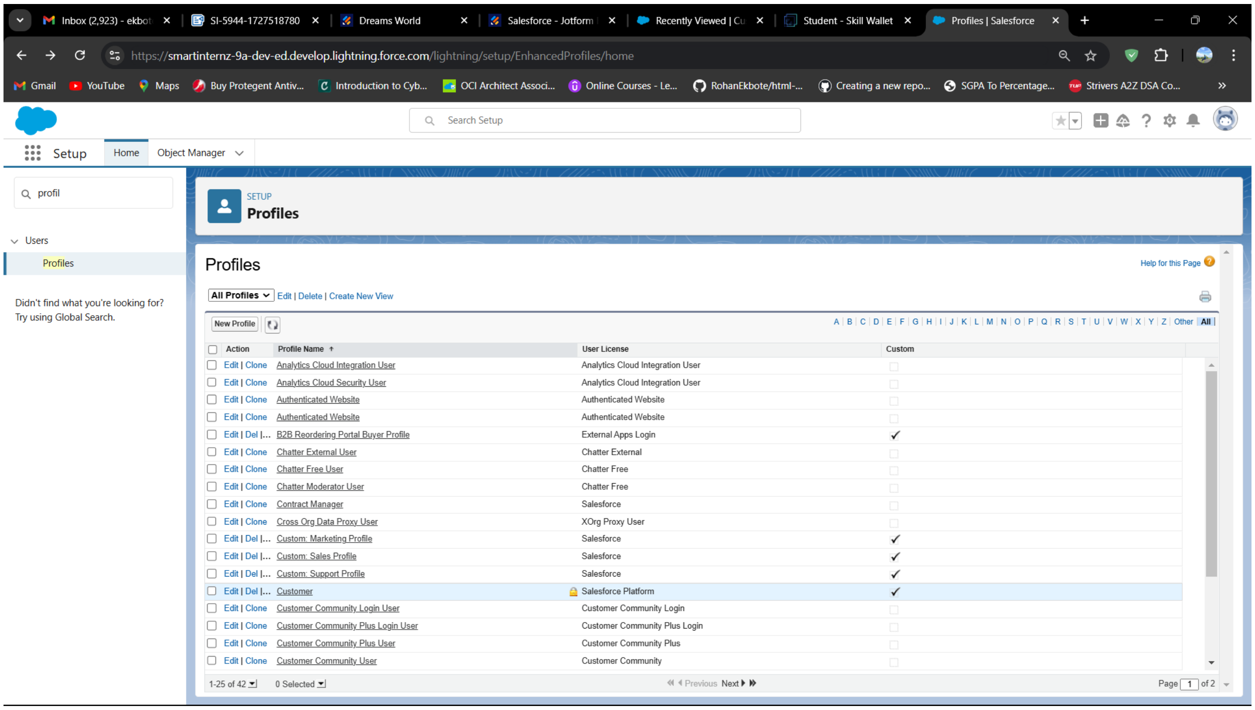




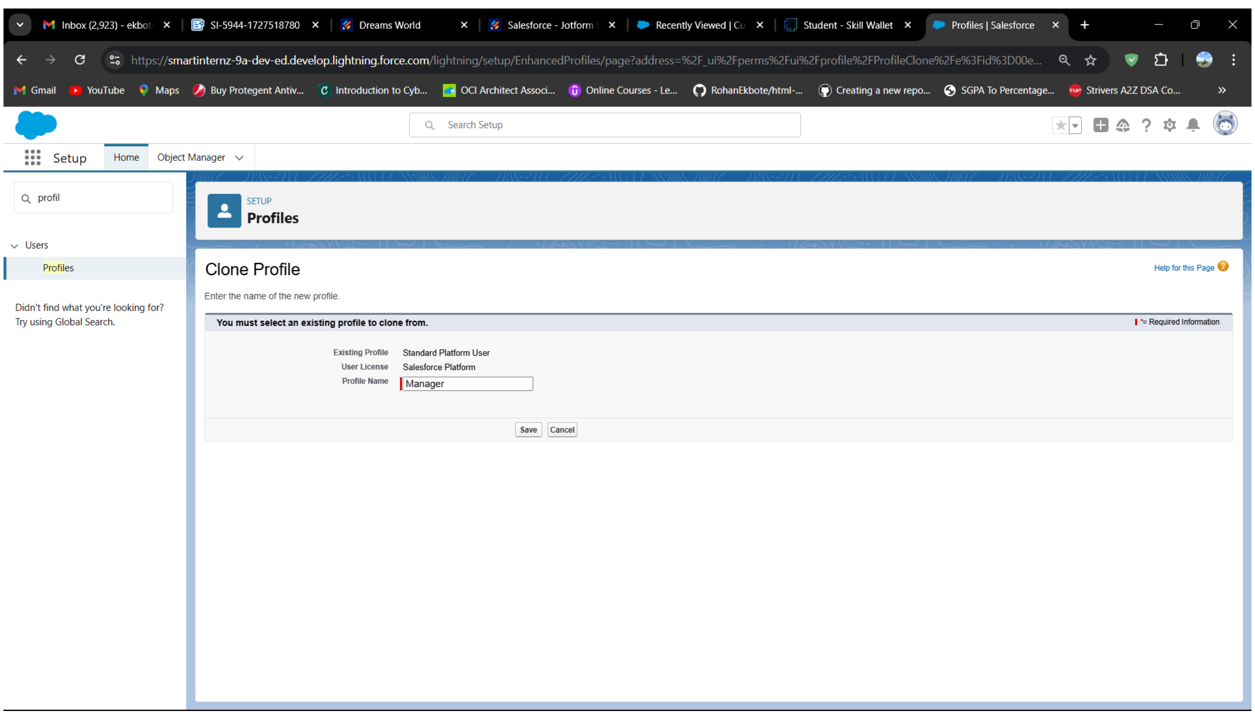
Profiles | Salesforce
https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM000007mx8D%2Fe%3FretURL%3D%252F00edM000007mx8...
Setup
Home
Object Manager
Search Setup
profil
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
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
Contacts
Contact Point Addresses
Contact Point Consents
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
Push Topics
Sellers
Streaming Channels



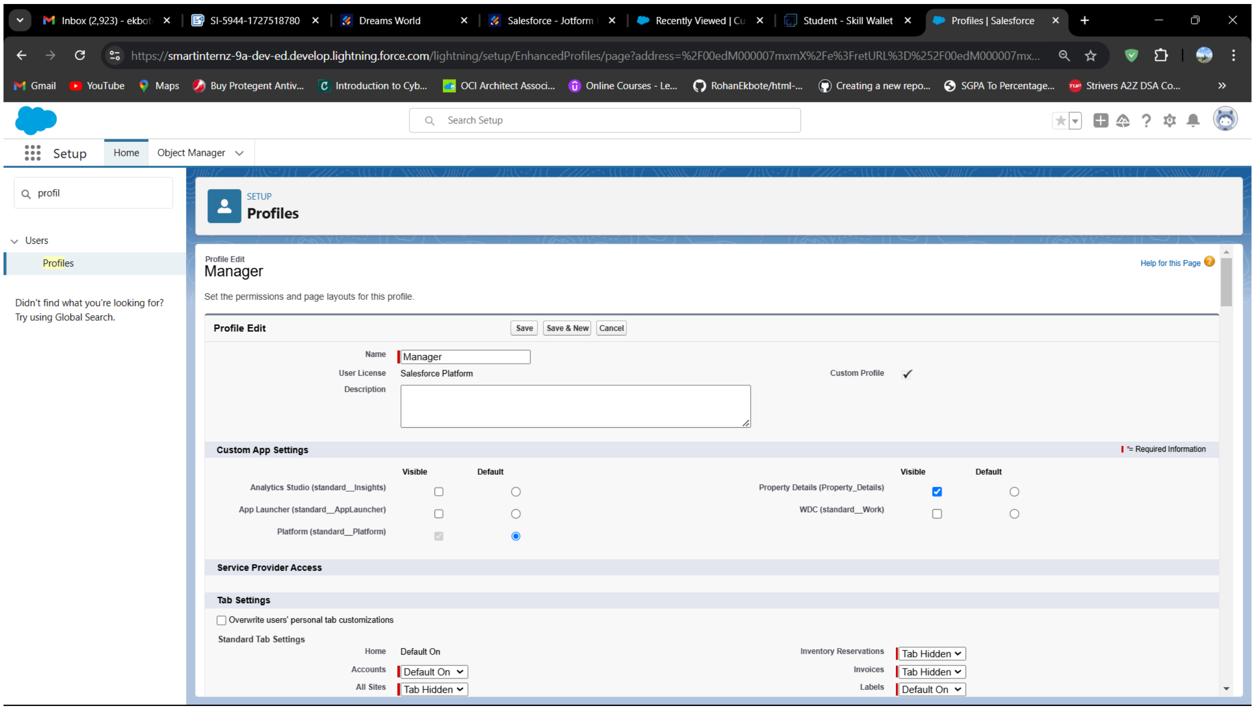
Profiles | Salesforce
Setup
Home
Object Manager
Search Setup
profil
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Communication Subscription Timings
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Party Consents
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Customer
Property
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10
Lockout effective period
15 minutes



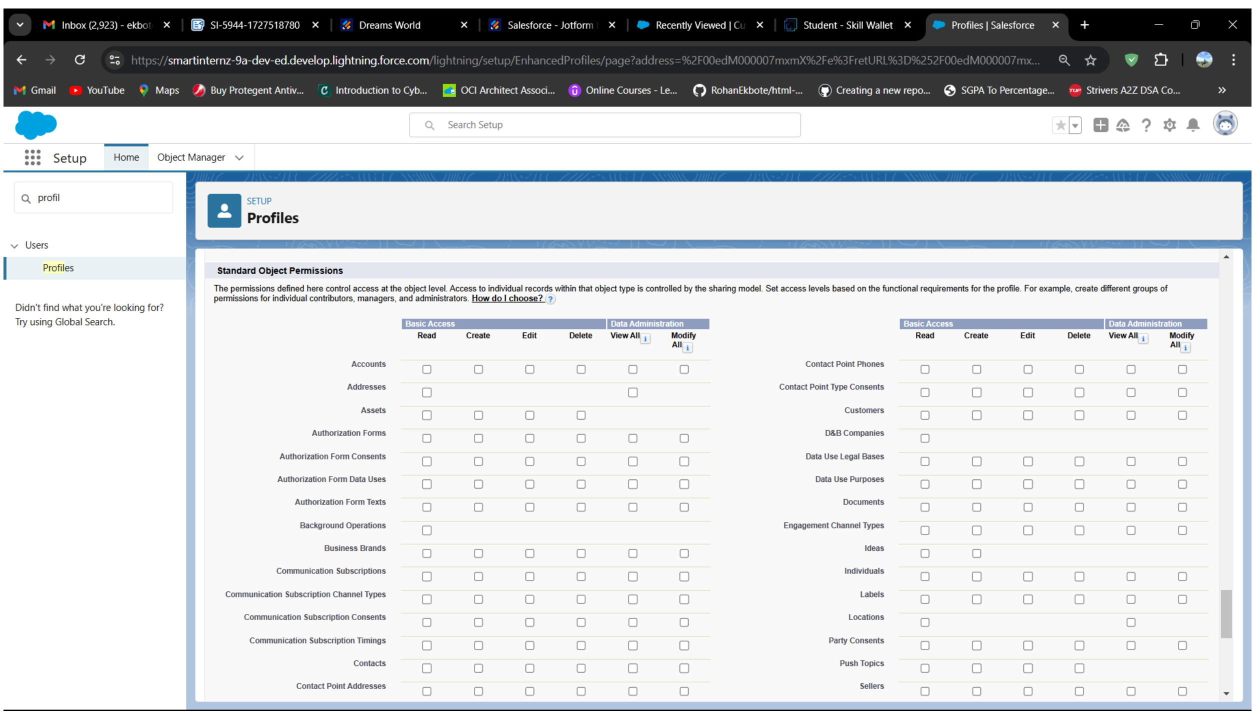
https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home
Setup
Home
Object Manager
profil
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
Action
Profile Name
User License
Custom
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
B2B Reordering Portal Buyer Profile
External Apps Login
Chatter External User
Chatter Free User
Chatter Moderator User
Contract Manager
Cross Org Data Proxy User
XOrg Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer
Salesforce Platform
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
1-25 of 42
0 Selected
Previous
Next
Page 1 of 2



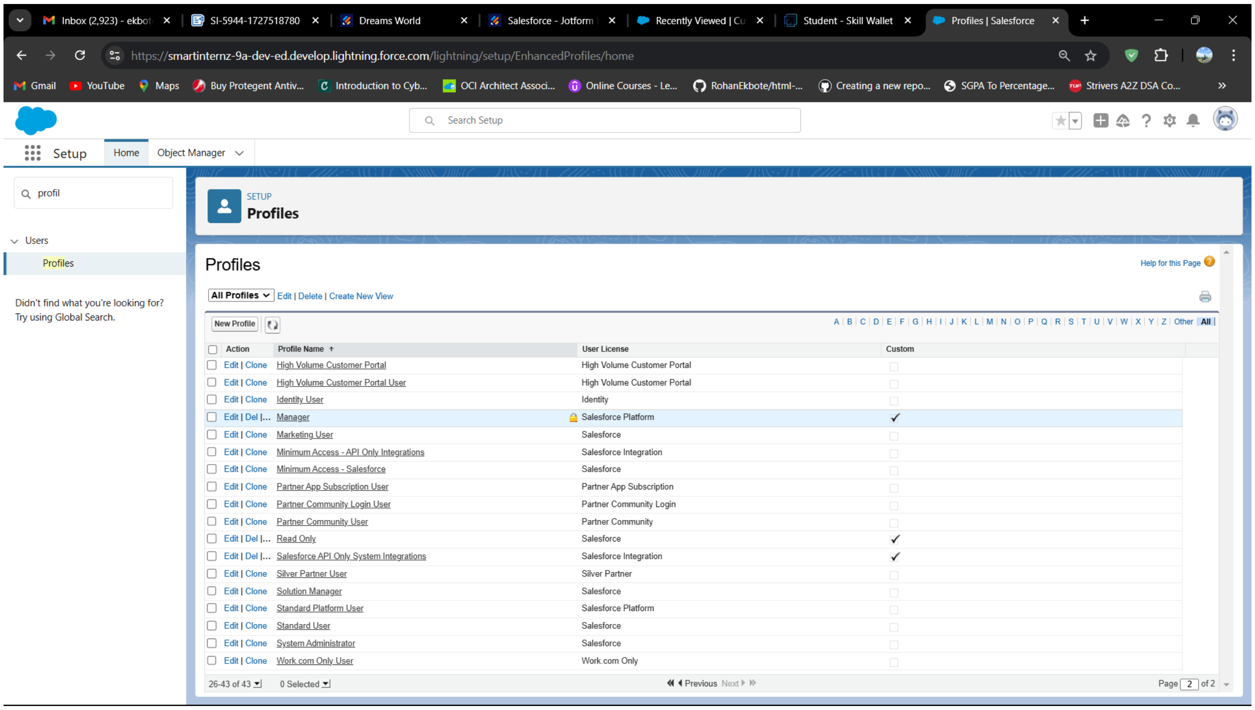
https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%3D00e...
Setup
Home
Object Manager
profil
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard Platform User
User License
Salesforce Platform
Profile Name
Manager
Save
Cancel



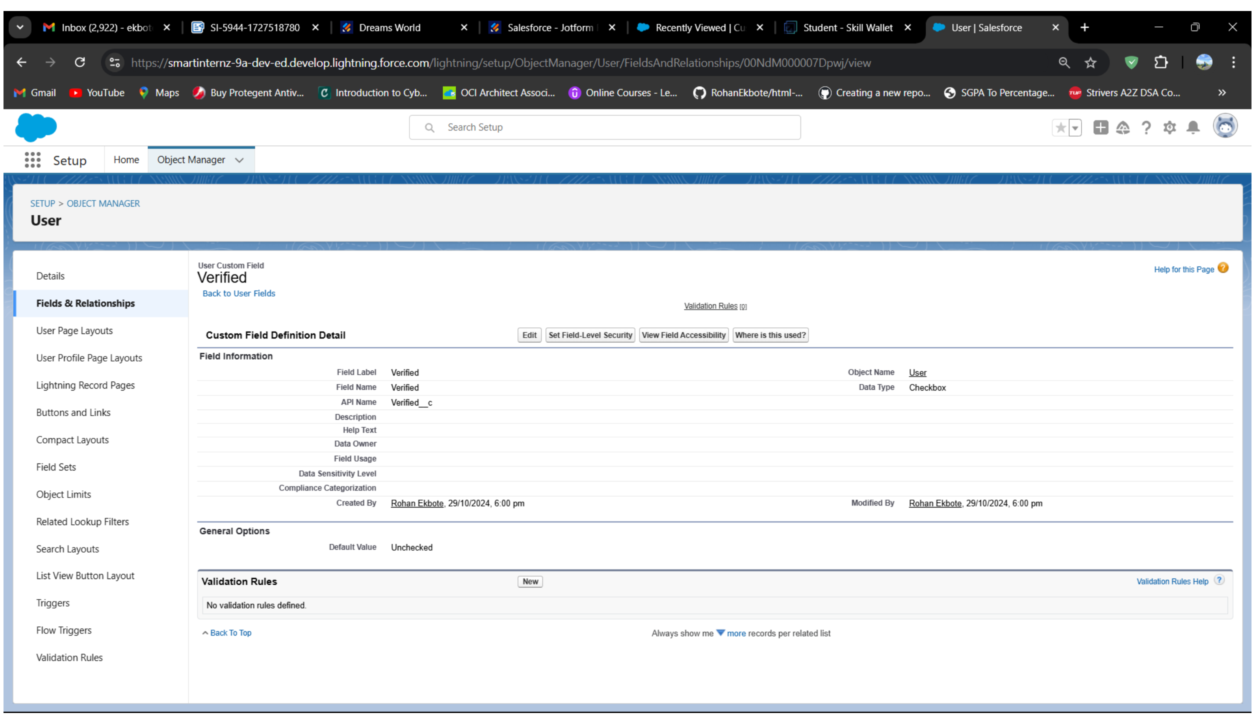
Setup
Home
Object Manager
Search Setup
profil
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile Edit
Manager
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
Manager
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Platform (standard__Platform)
Property Details (Property_Details)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home
Default On
Accounts
Default On
All Sites
Tab Hidden
Inventory Reservations
Tab Hidden
Invoices
Tab Hidden
Labels
Default On

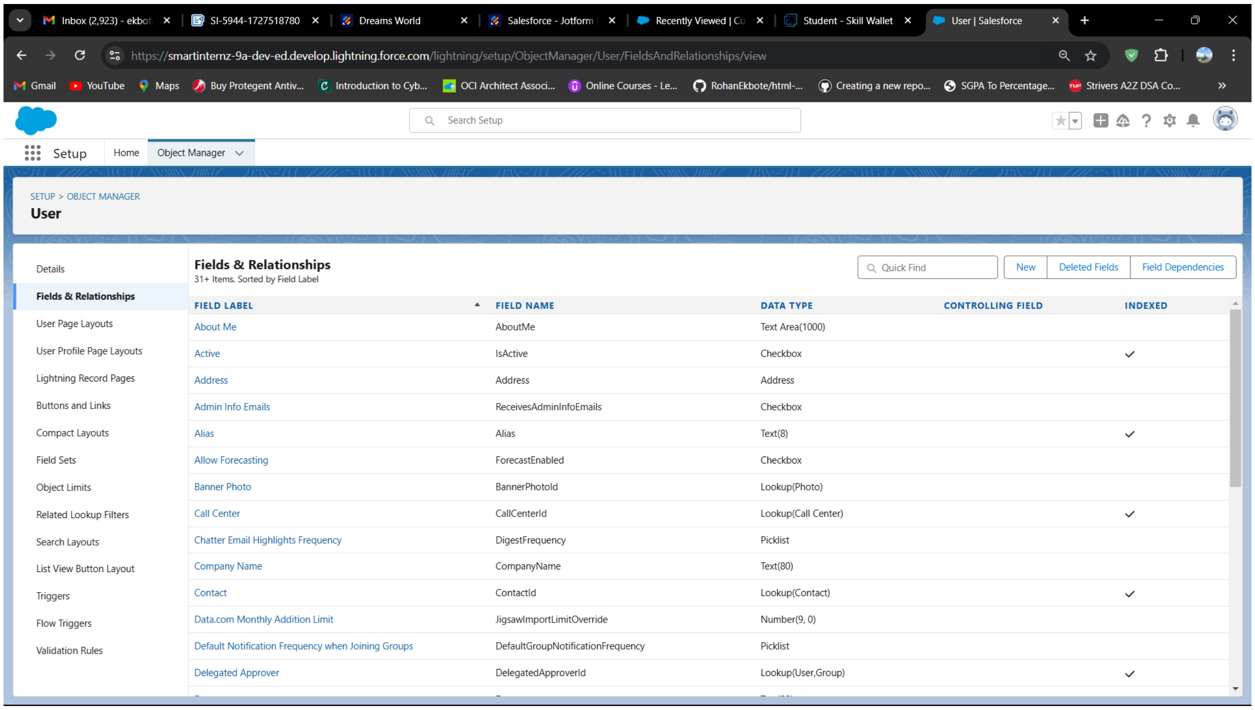


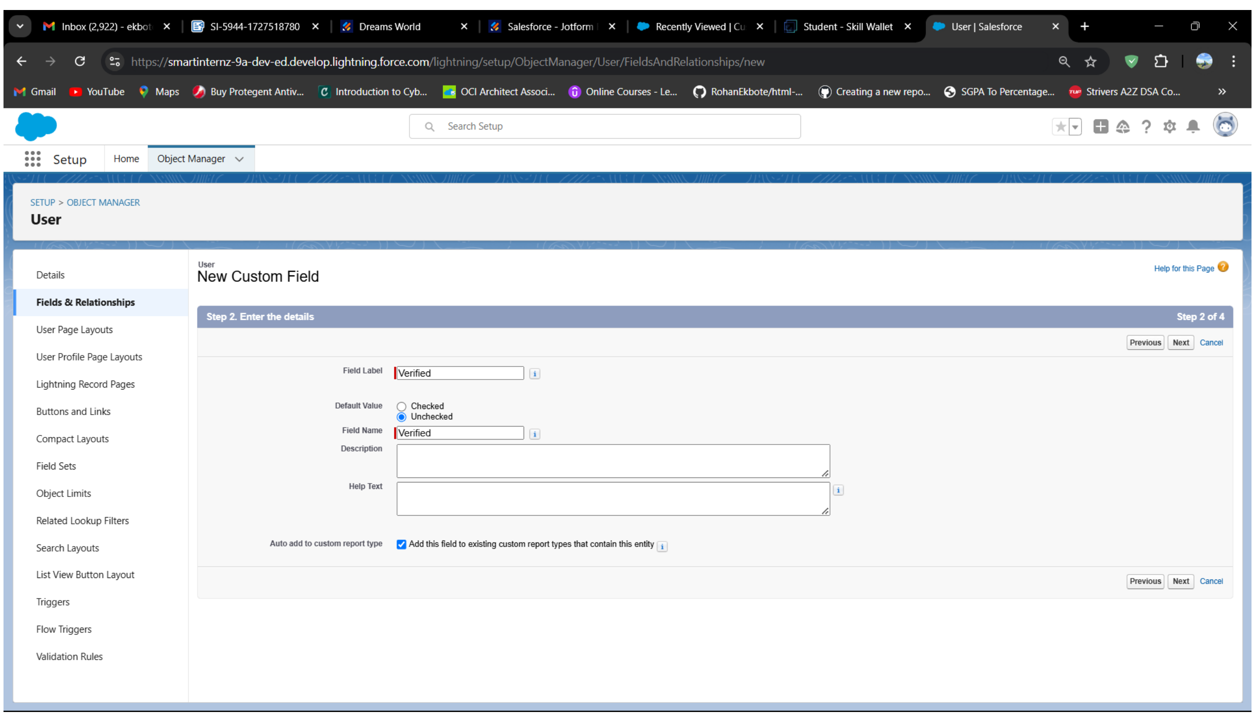
Setup
Home
Object Manager
Search Setup
profil
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Standard Object Permissions
The permissions defined here control access at the object level. Access to individual records within that object type is controlled by 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. 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
Contacts
Contact Point Addresses
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
Push Topics
Sellers



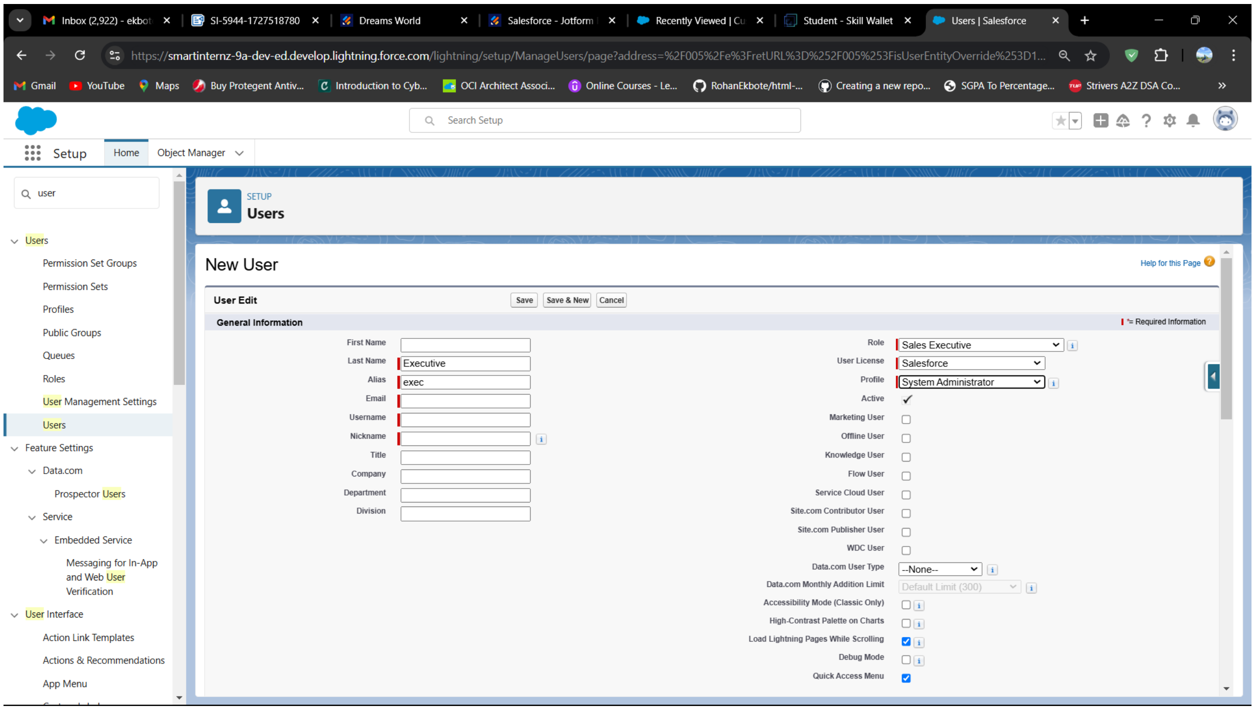
7. Create a Check Box field on user

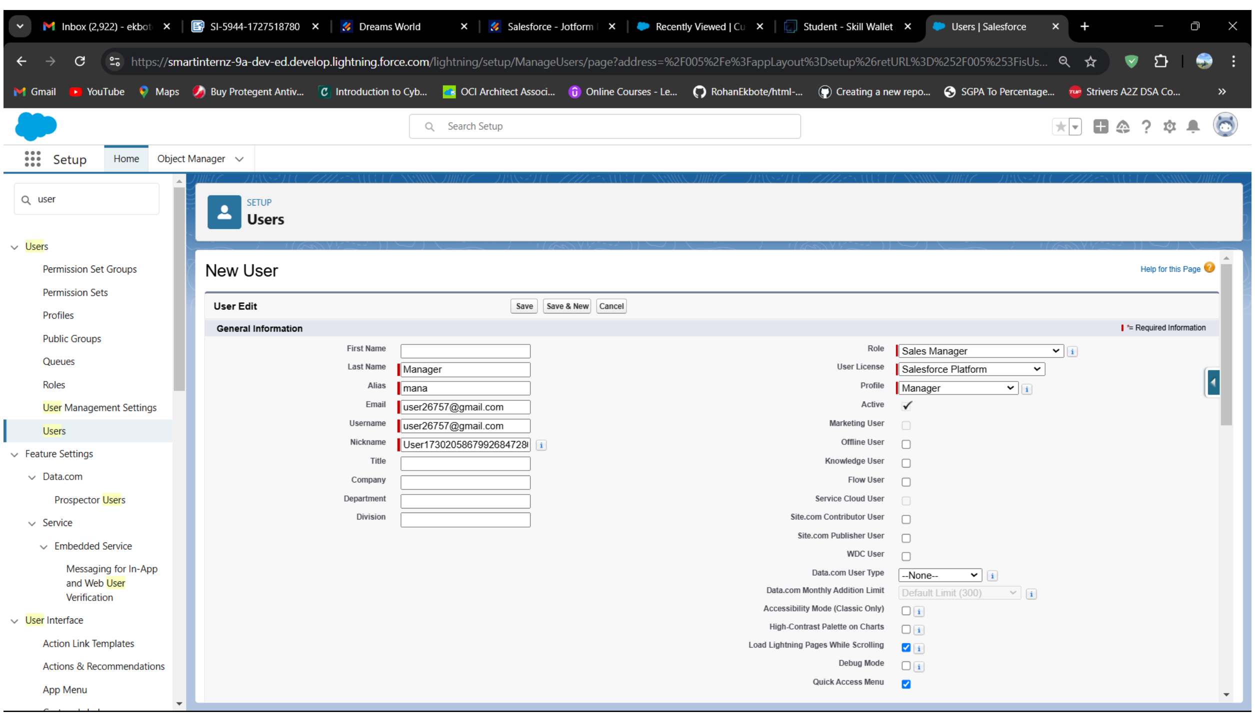


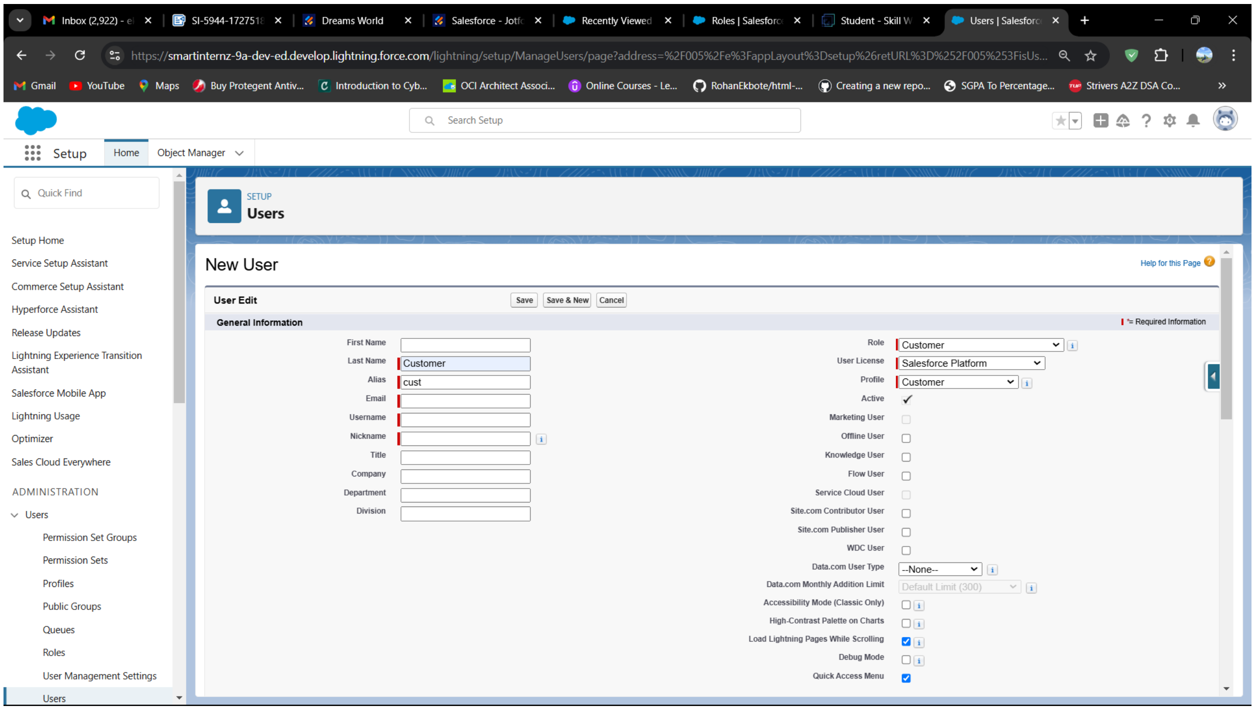

https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/User/FieldsAndRelationships/view
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
User
Details
Fields & Relationships
User Page Layouts
User Profile Page Layouts
Lightning Record Pages
Buttons and Links
Compact Layouts
Field Sets
Object Limits
Related Lookup Filters
Search Layouts
List View Button Layout
Triggers
Flow Triggers
Validation Rules
Fields & Relationships
31+ Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
About Me
AboutMe
Text Area(1000)
Active
IsActive
Checkbox
Address
Address
Address
Admin Info Emails
ReceivesAdminInfoEmails
Checkbox
Alias
Alias
Text(8)
Allow Forecasting
ForecastEnabled
Checkbox
Banner Photo
BannerPhotoId
Lookup(Photo)
Call Center
CallCenterId
Lookup(Call Center)
Chatter Email Highlights Frequency
DigestFrequency
Picklist
Company Name
CompanyName
Text(80)
Contact
ContactId
Lookup(Contact)
Data.com Monthly Addition Limit
JigsawImportLimitOverride
Number(9, 0)
Default Notification Frequency when Joining Groups
DefaultGroupNotificationFrequency
Picklist
Delegated Approver
DelegatedApproverId
Lookup(User,Group)

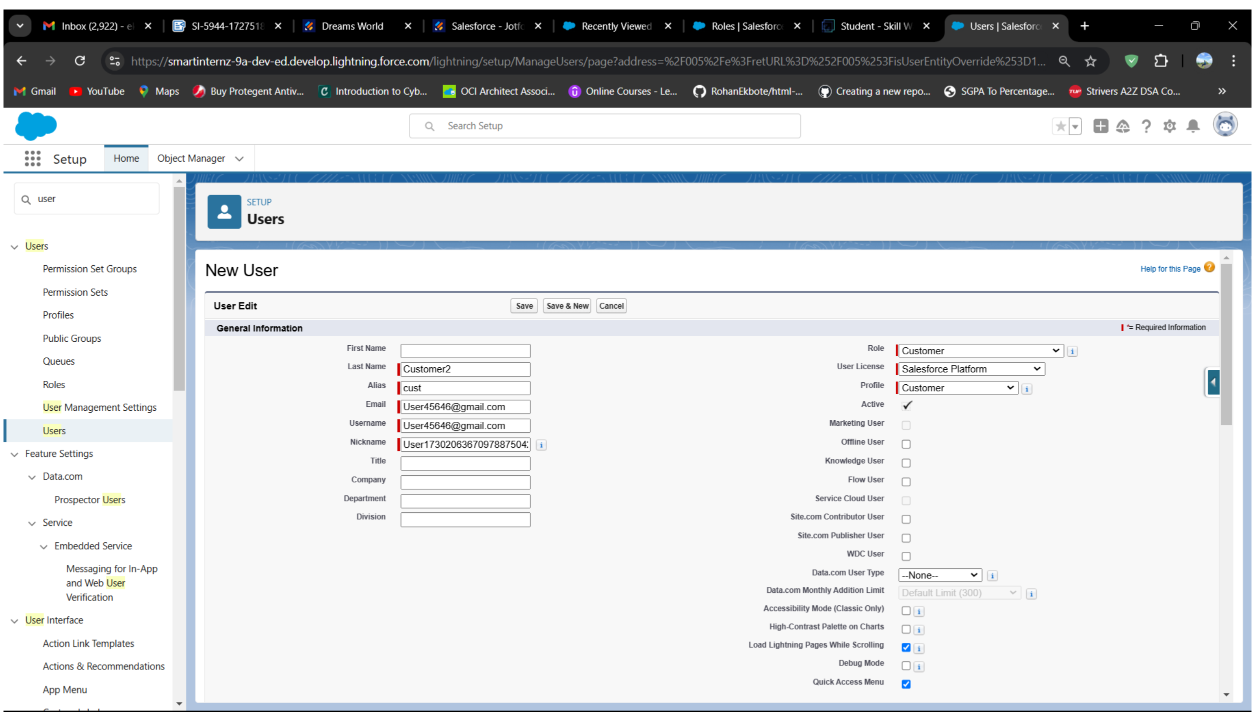

https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/User/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
User
User
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Verified
Default Value
Checked
Unchecked
Field Name
Verified
Description
Help Text
Auto add to custom report type
Add this field to existing custom report types that contain this entity

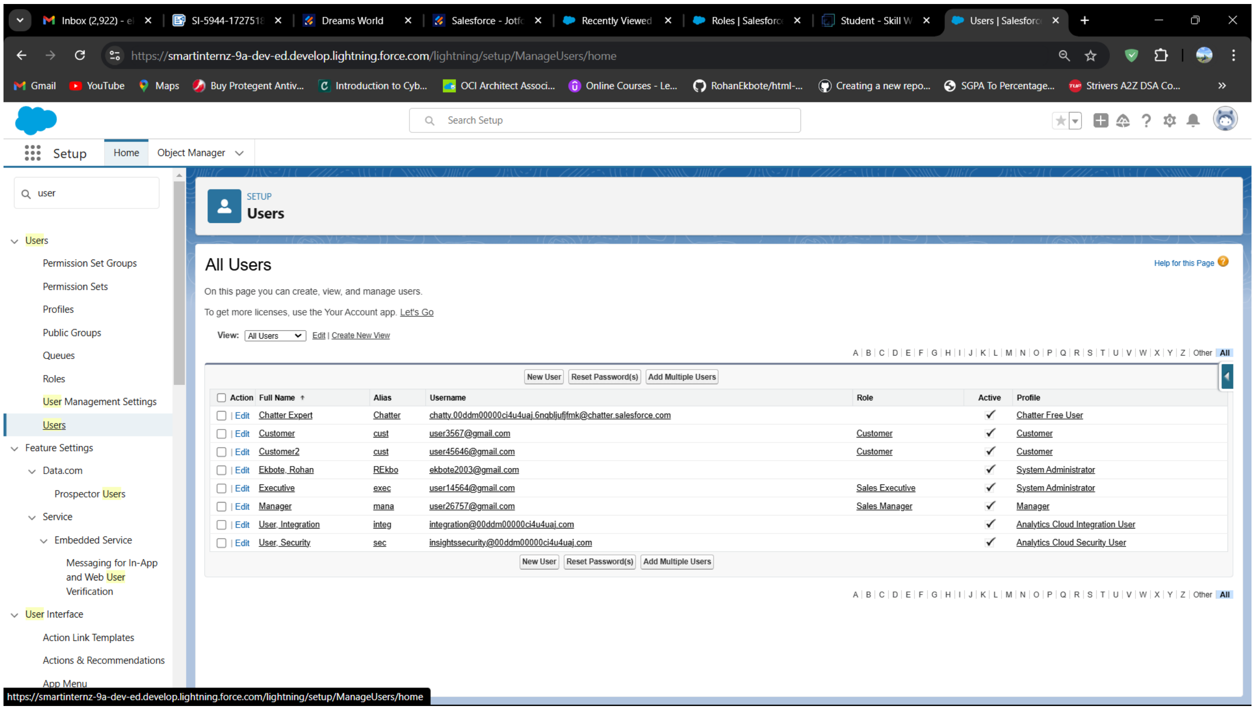
8. Create Users



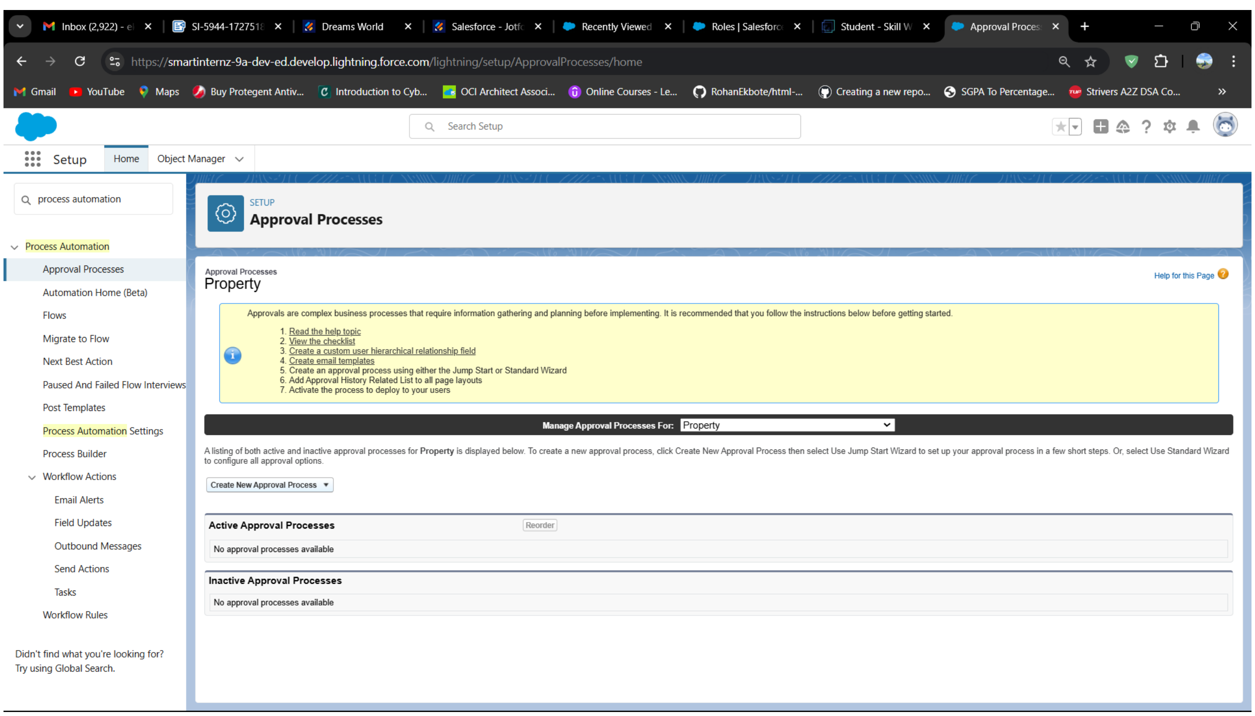


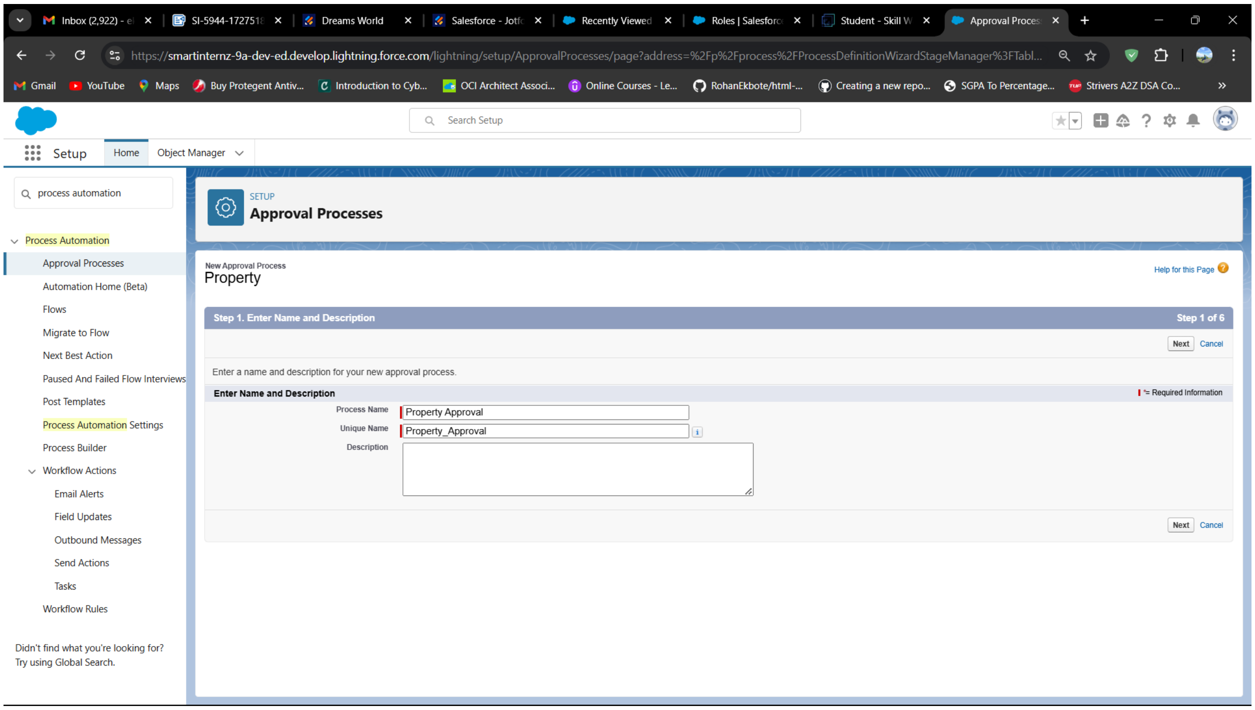
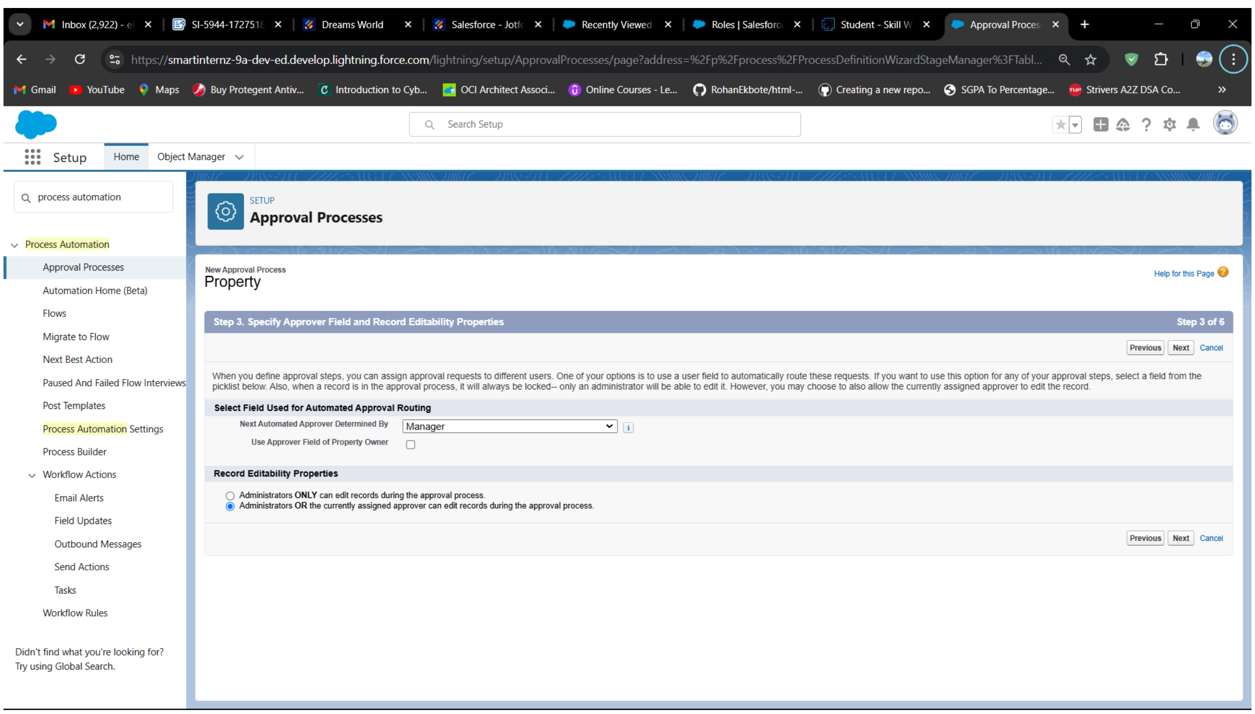

https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FappLayout%3Dsetup%26retURL%3D%252F005%253FisUs...
Setup
Home
Object Manager
Search Setup
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Assistant
Hyperforce Assistant
Release 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
Roles
User Management Settings
Users
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Last Name
Customer
Alias
cust
Email
Username
Nickname
Title
Company
Department
Division
Role
Customer
User License
Salesforce Platform
Profile
Customer
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Default Limit (300)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode
Quick Access Menu

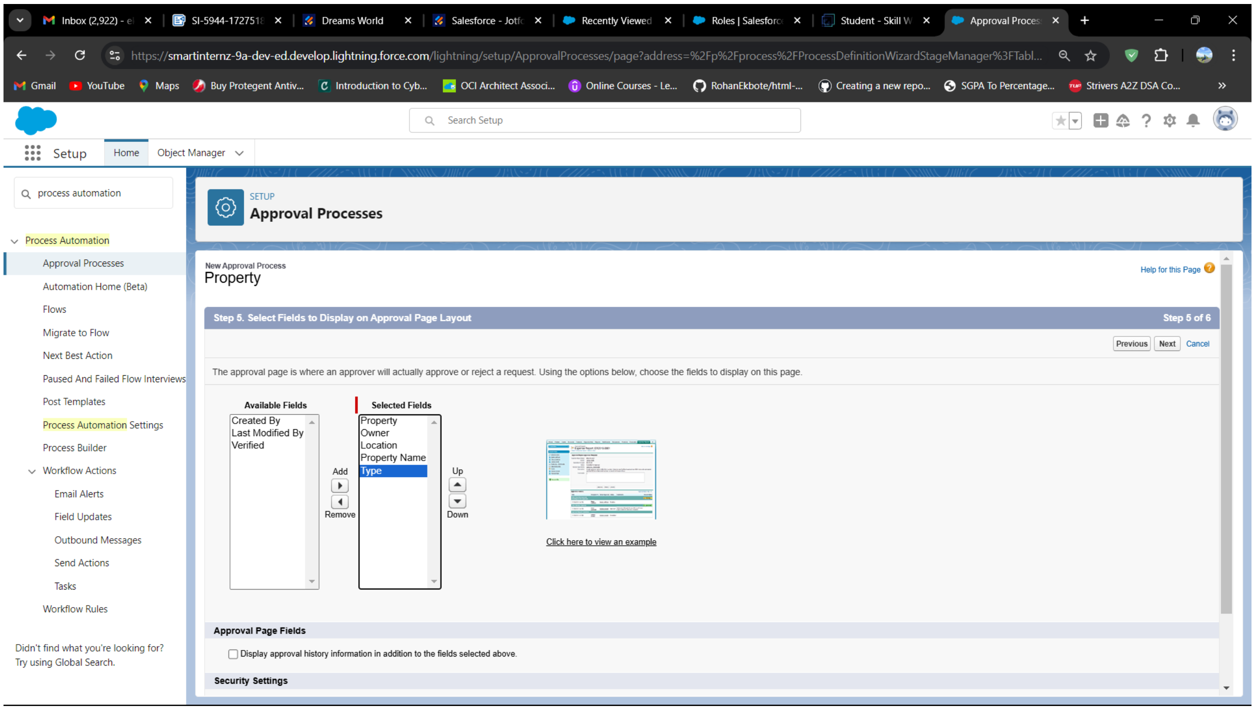

https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOverride%253D1...
Setup
Home
Object Manager
Search Setup
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Last Name
Customer2
Alias
cust
Email
User45646@gmail.com
Username
User45646@gmail.com
Nickname
User17302063670978875042
Title
Company
Department
Division
Role
Customer
User License
Salesforce Platform
Profile
Customer
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Default Limit (300)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode
Quick Access Menu

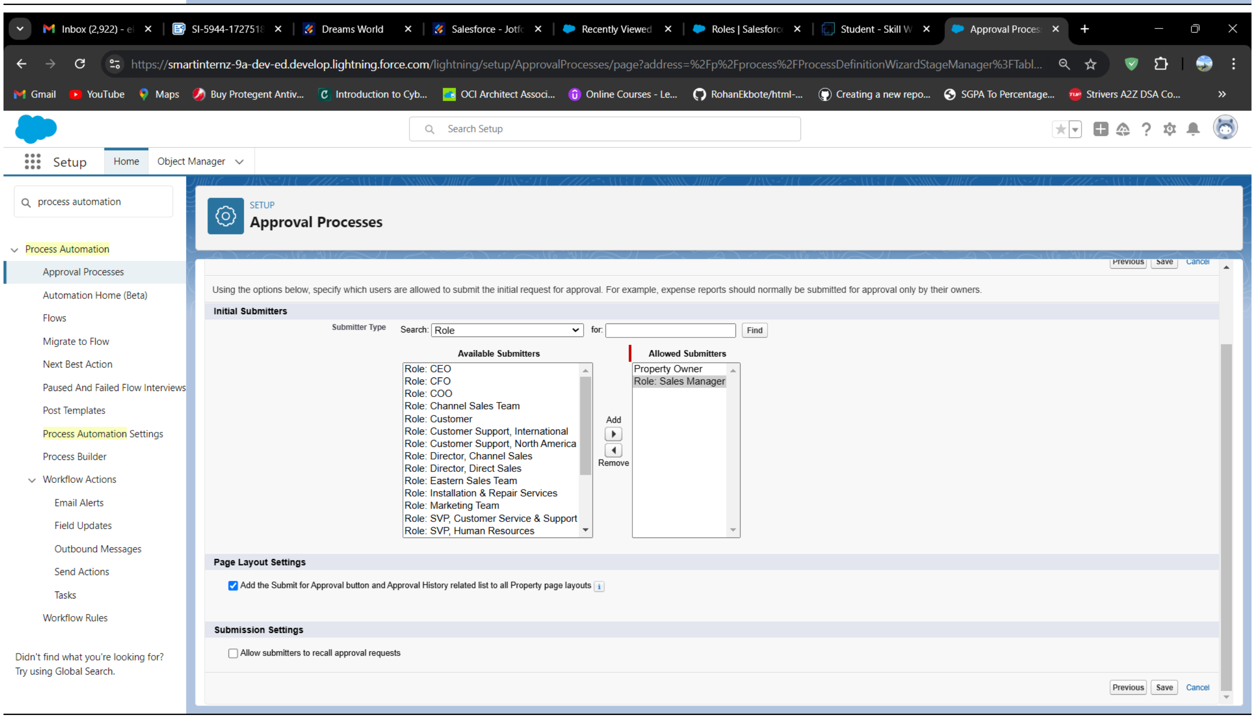


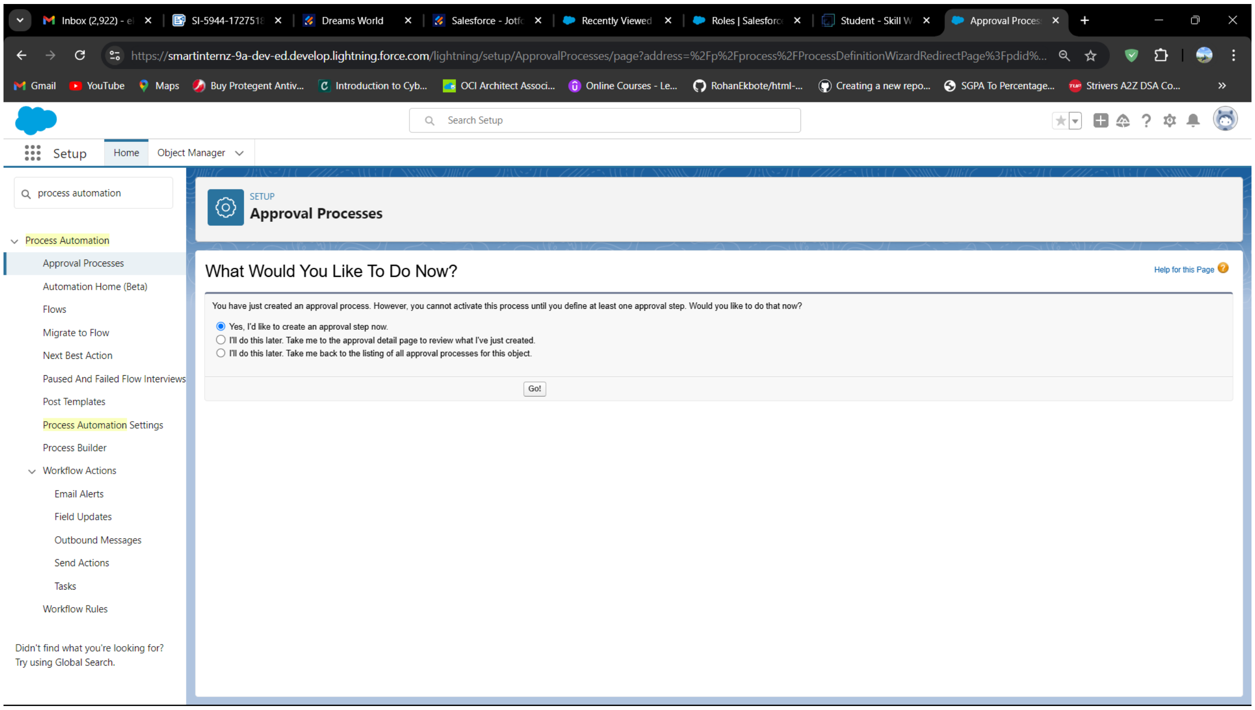
9. Create an Approval Process for Property Object

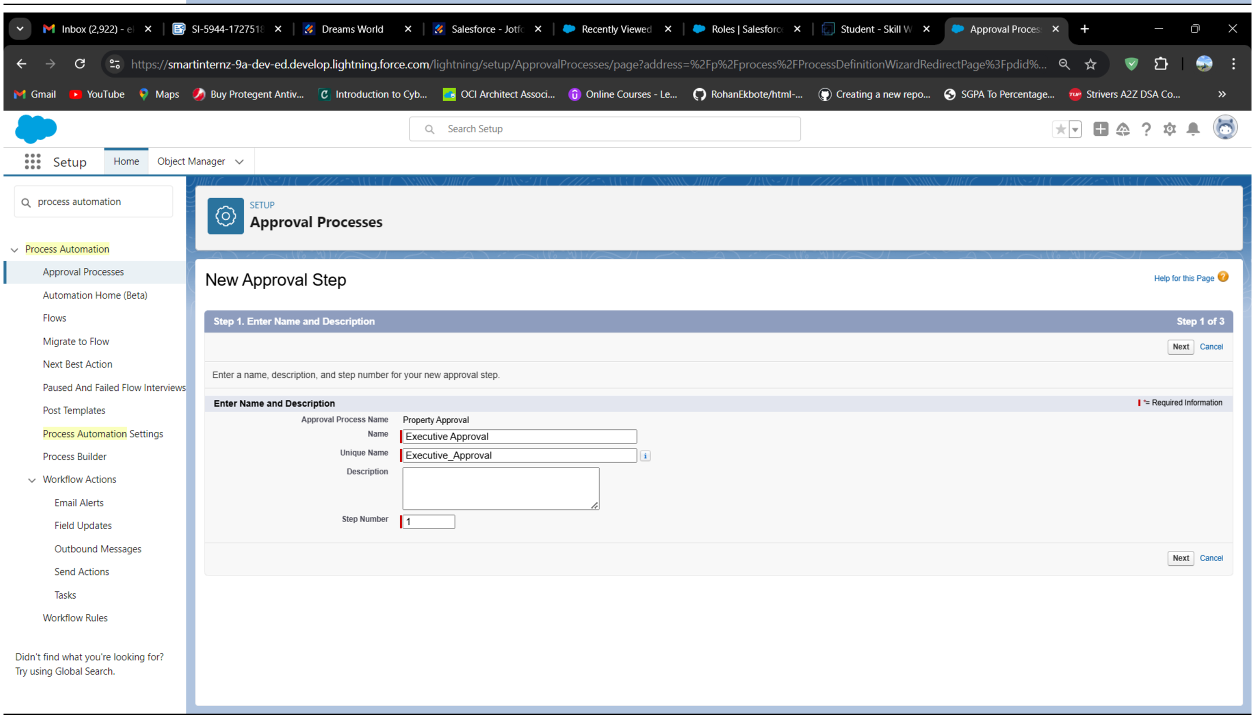


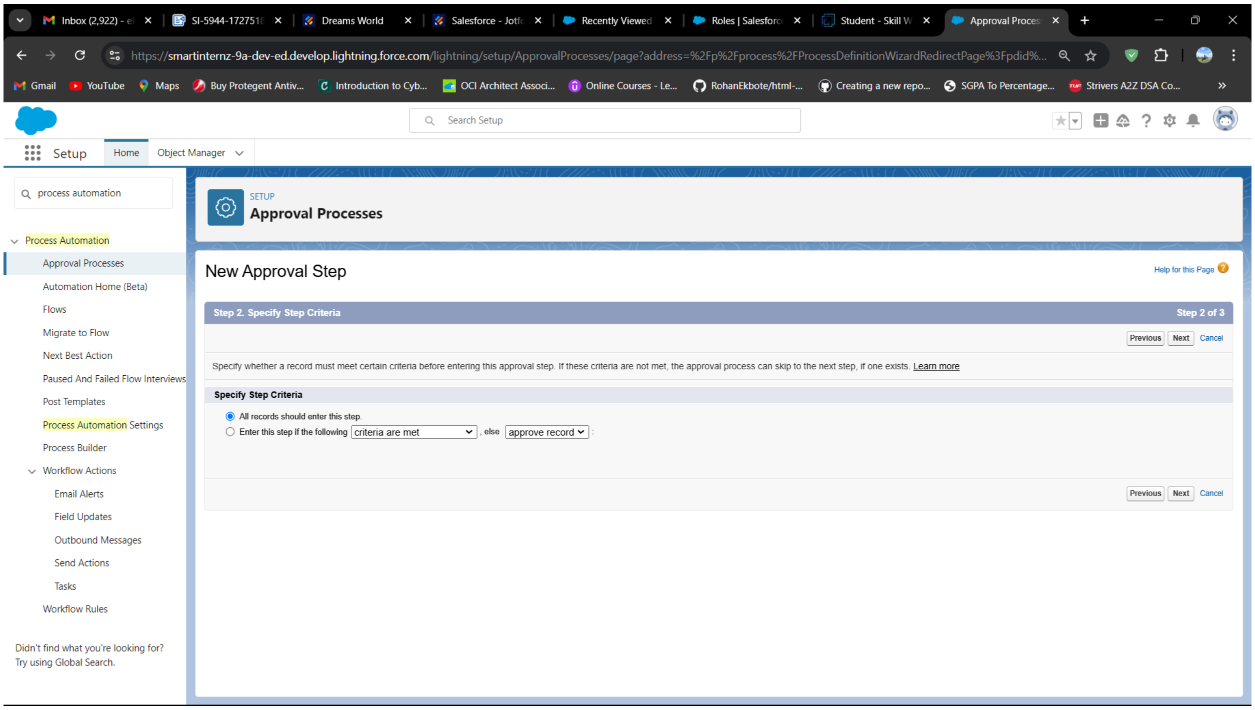

Setup
Home
Object Manager
Search Setup
process automation
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Didn't find what you're looking for?
Try using Global Search.
SETUP
Approval Processes
New Approval Process
Property
Help for this Page
Step 1. Enter Name and Description
Step 1 of 6
Next
Cancel
Enter a name and description for your new approval process.
Enter Name and Description
= Required Information
Process Name
Property Approval
Unique Name
Property_Approval
Description
Next
Cancel

Setup
Home
Object Manager
Search Setup
process automation
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Didn't find what you're looking for?
Try using Global Search.
SETUP
Approval Processes
New Approval Process
Property
Help for this Page
Step 3. Specify Approver Field and Record Editability Properties
Step 3 of 6
Previous
Next
Cancel
When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.
Select Field Used for Automated Approval Routing
Next Automated Approver Determined By
Manager
Use Approver Field of Property Owner
Record Editability Properties
Administrators ONLY can edit records during the approval process.
Administrators OR the currently assigned approver can edit records during the approval process.
Previous
Next
Cancel

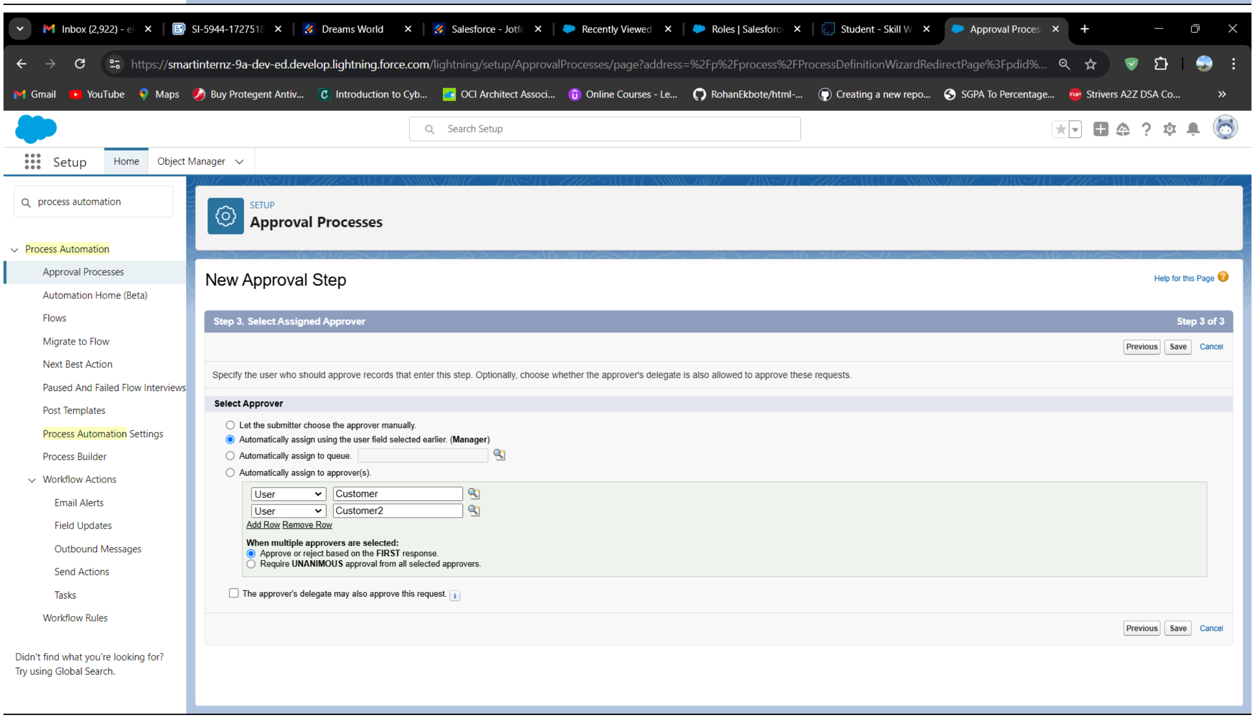

SETUP
Approval Processes
New Approval Process
Property
Help for this Page
Step 5. Select Fields to Display on Approval Page Layout
Step 5 of 6
Previous
Next
Cancel
The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.
Available Fields
Created By
Last Modified By
Verified
Add
Remove
Selected Fields
Property
Owner
Location
Property Name
Type
Up
Down
Click here to view an example
Approval Page Fields
Display approval history information in addition to the fields selected above.
Security Settings
process automation
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Didn't find what you're looking for?
Try using Global Search.

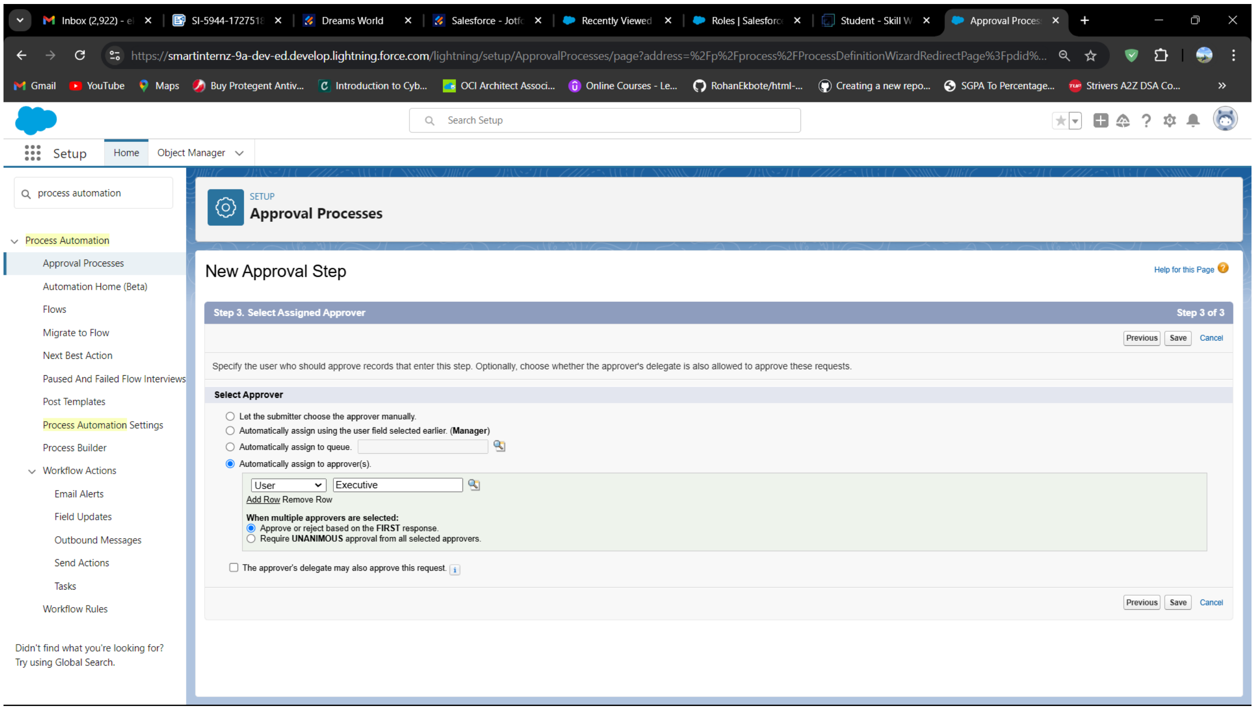

SETUP
Approval Processes
Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.
Initial Submitters
Submitter Type
Search: Role
for:
Find
Available Submitters
Role: CEO
Role: CFO
Role: COO
Role: Channel Sales Team
Role: Customer
Role: Customer Support, International
Role: Customer Support, North America
Role: Director, Channel Sales
Role: Director, Direct Sales
Role: Eastern Sales Team
Role: Installation & Repair Services
Role: Marketing Team
Role: SVP, Customer Service & Support
Role: SVP, Human Resources
Add
Remove
Allowed Submitters
Property Owner
Role: Sales Manager
Page Layout Settings
Add the Submit for Approval button and Approval History related list to all Property page layouts
Submission Settings
Allow submitters to recall approval requests
Previous
Save
Cancel


https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2Fp%2Fprocess%2FProcessDefinitionWizardRedirectPage%3Fpdid%...
Search Setup
Setup
Home
Object Manager
process automation
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Approval Processes
What Would You Like To Do Now?
Help for this Page
You have just created an approval process. However, you cannot activate this process until you define at least one approval step. Would you like to do that now?
Yes, I'd like to create an approval step now.
I'll do this later. Take me to the approval detail page to review what I've just created.
I'll do this later. Take me back to the listing of all approval processes for this object.
Go!

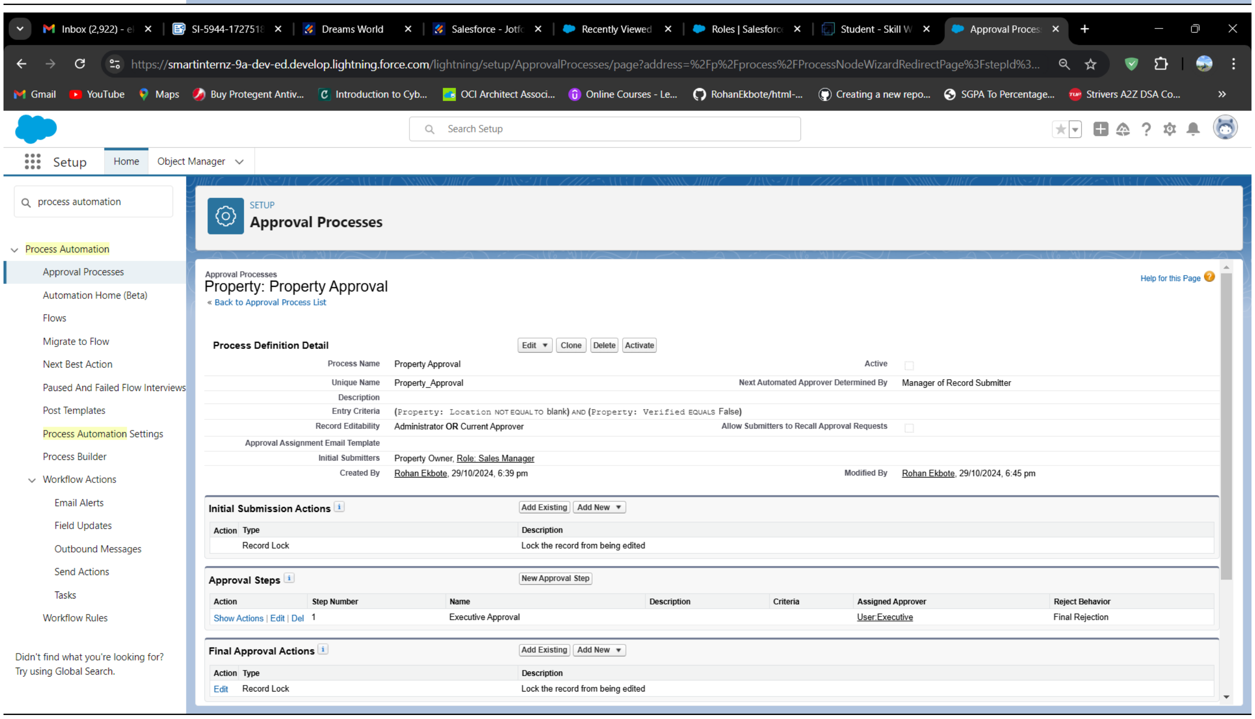

https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2Fp%2Fprocess%2FProcessDefinitionWizardRedirectPage%3Fpdid%...
Search Setup
Setup
Home
Object Manager
process automation
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Approval Processes
New Approval Step
Help for this Page
Step 1. Enter Name and Description
Step 1 of 3
Next
Cancel
Enter a name, description, and step number for your new approval step.
Enter Name and Description
= Required Information
Approval Process Name
Property Approval
Name
Executive Approval
Unique Name
Executive_Approval
Description
Step Number
1
Next
Cancel


Approval Processes
https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2Fp%2Fprocess%2FProcessDefinitionWizardRedirectPage%3Fpdid%...
Search Setup
Setup
Home
Object Manager
process automation
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Didn't find what you're looking for?
Try using Global Search.
SETUP
Approval Processes
New Approval Step
Help for this Page
Step 2. Specify Step Criteria
Step 2 of 3
Previous
Next
Cancel
Specify whether a record must meet certain criteria before entering this approval step. If these criteria are not met, the approval process can skip to the next step, if one exists. Learn more
Specify Step Criteria
All records should enter this step.
Enter this step if the following
criteria are met
, else
approve record
Previous
Next
Cancel

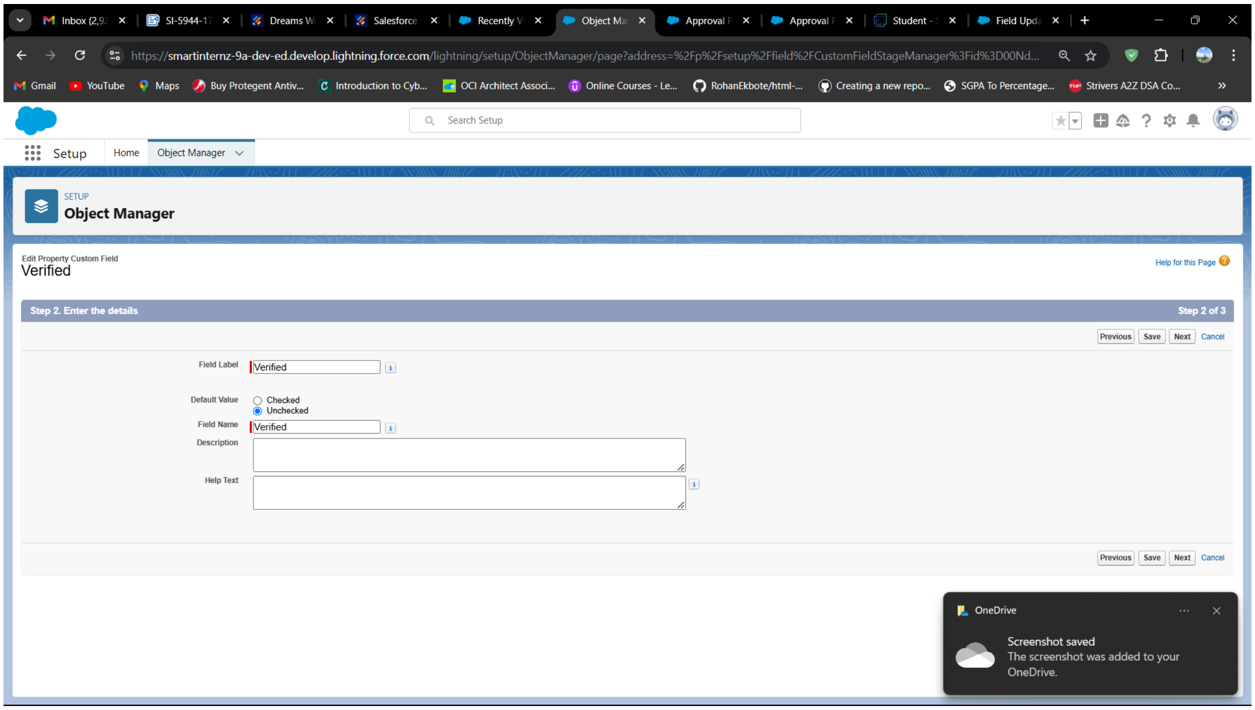

Approval Processes
https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2Fp%2Fprocess%2FProcessDefinitionWizardRedirectPage%3Fpdid%...
Search Setup
Setup
Home
Object Manager
process automation
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Didn't find what you're looking for?
Try using Global Search.
SETUP
Approval Processes
New Approval Step
Help for this Page
Step 3. Select Assigned Approver
Step 3 of 3
Previous
Save
Cancel
Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.
Select Approver
Let the submitter choose the approver manually.
Automatically assign using the user field selected earlier. (Manager)
Automatically assign to queue.
Automatically assign to approver(s).
User
Customer
User
Customer2
Add Row Remove Row
When multiple approvers are selected:
Approve or reject based on the FIRST response.
Require UNANIMOUS approval from all selected approvers.
The approver's delegate may also approve this request.
Previous
Save
Cancel

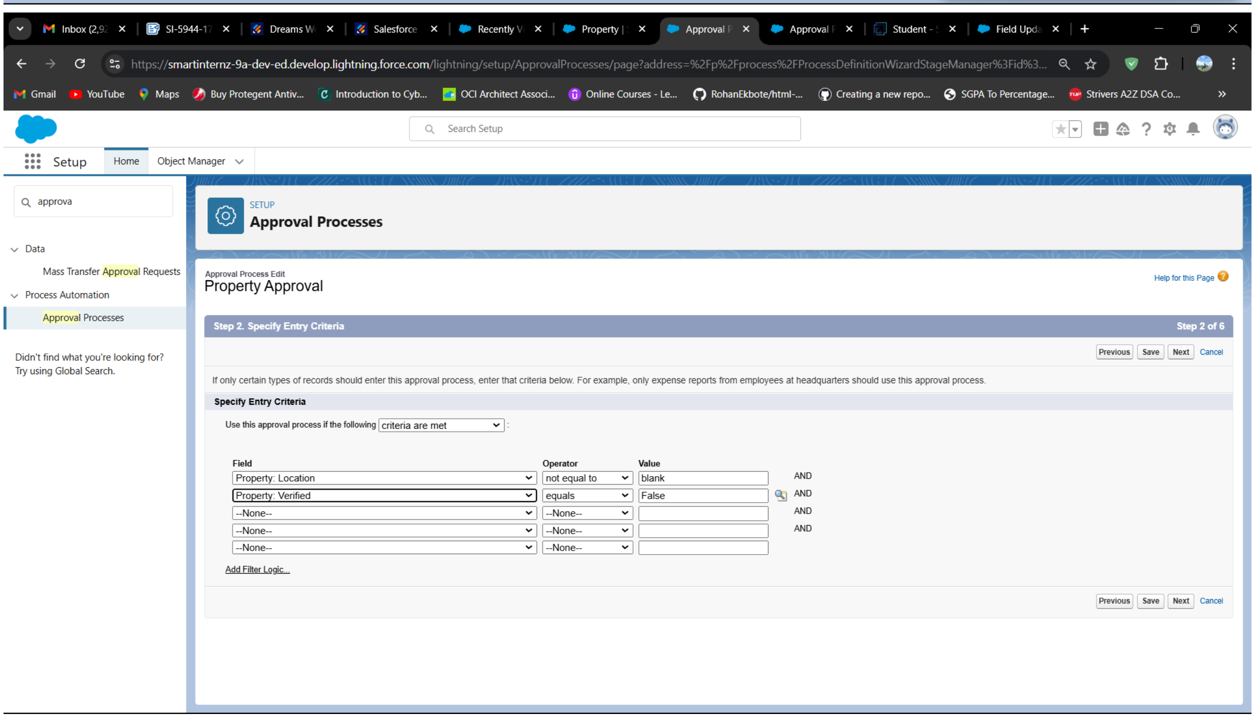


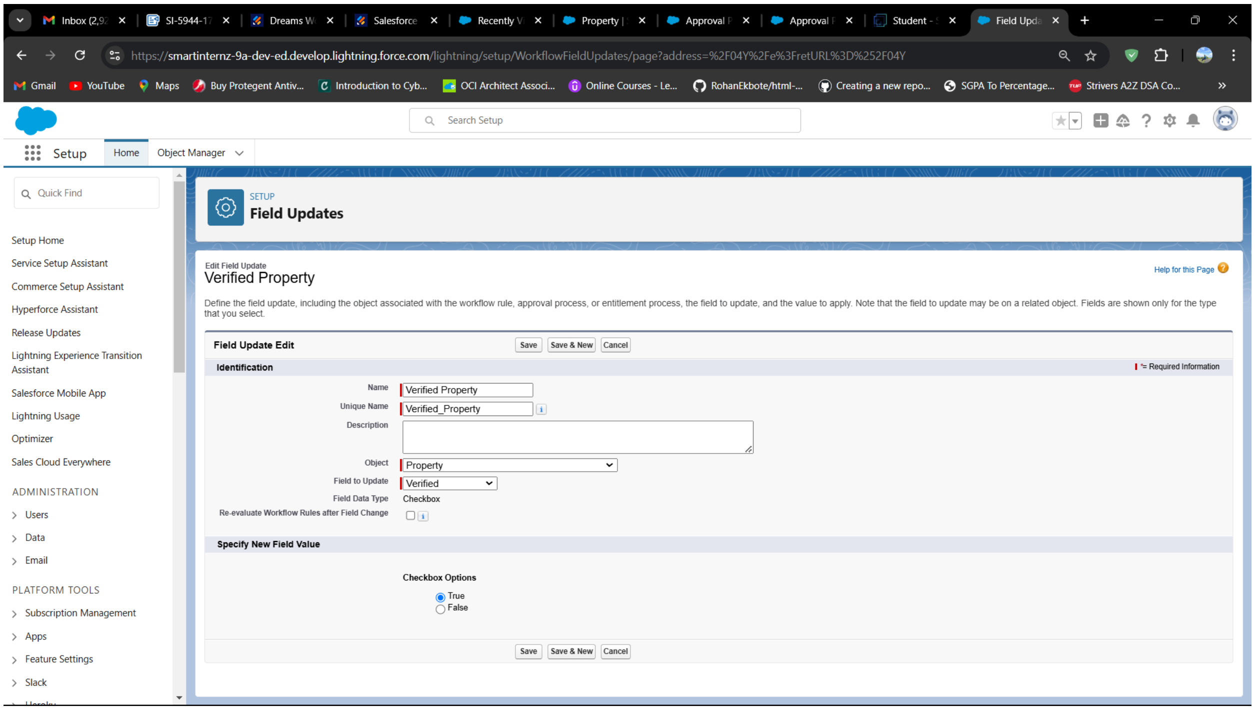
https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2Fp%2Fprocess%2FProcessDefinitionWizardRedirectPage%3Fpdid%...
Setup
Home
Object Manager
process automation
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Approval Processes
New Approval Step
Help for this Page
Step 3. Select Assigned Approver
Step 3 of 3
Previous Save Cancel
Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.
Select Approver
Let the submitter choose the approver manually.
Automatically assign using the user field selected earlier. (Manager)
Automatically assign to queue.
Automatically assign to approver(s).
User
Executive
Add Row Remove Row
When multiple approvers are selected:
Approve or reject based on the FIRST response.
Require UNANIMOUS approval from all selected approvers.
The approver's delegate may also approve this request.
Previous Save Cancel

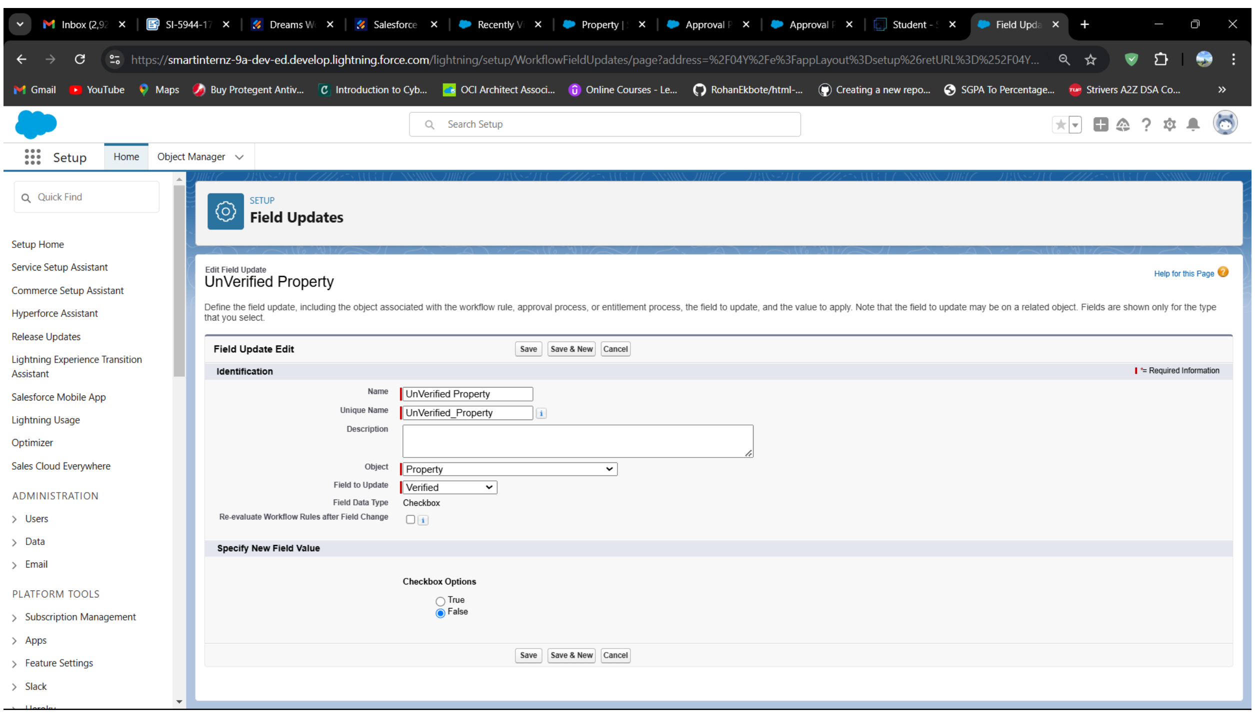


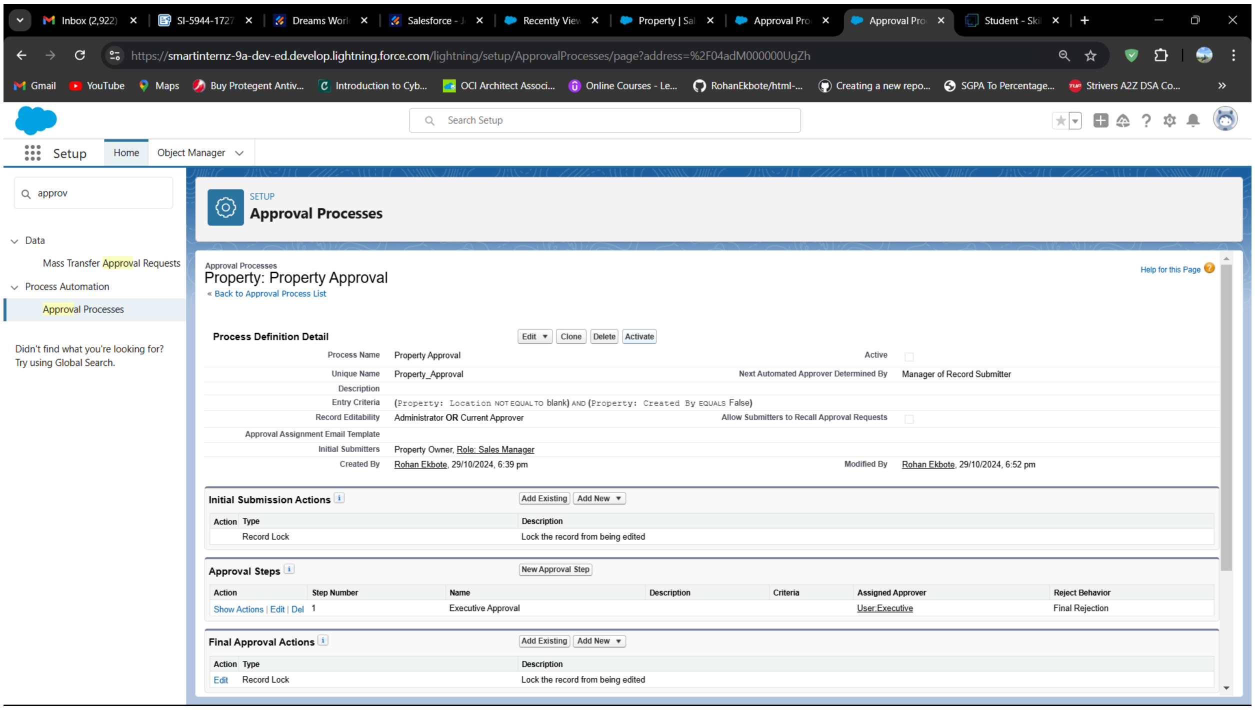
https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2Fp%2Fprocess%2FProcessNodeWizardRedirectPage%3FstepId%3...
SETUP
Approval Processes
Approval Processes
Property: Property Approval
« Back to Approval Process List
Help for this Page
Process Definition Detail
Edit Clone Delete Activate
Process Name Property Approval
Active
Unique Name Property_Approval
Next Automated Approver Determined By Manager of Record Submitter
Description
Entry Criteria (Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS False)
Record Editability Administrator OR Current Approver
Allow Submitters to Recall Approval Requests
Approval Assignment Email Template
Initial Submitters Property Owner, Role: Sales Manager
Created By Rohan Ekbote, 29/10/2024, 6:39 pm
Modified By Rohan Ekbote, 29/10/2024, 6:45 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
Final Approval Actions
Add Existing Add New
Action Type Description
Edit Record Lock Lock the record from being edited

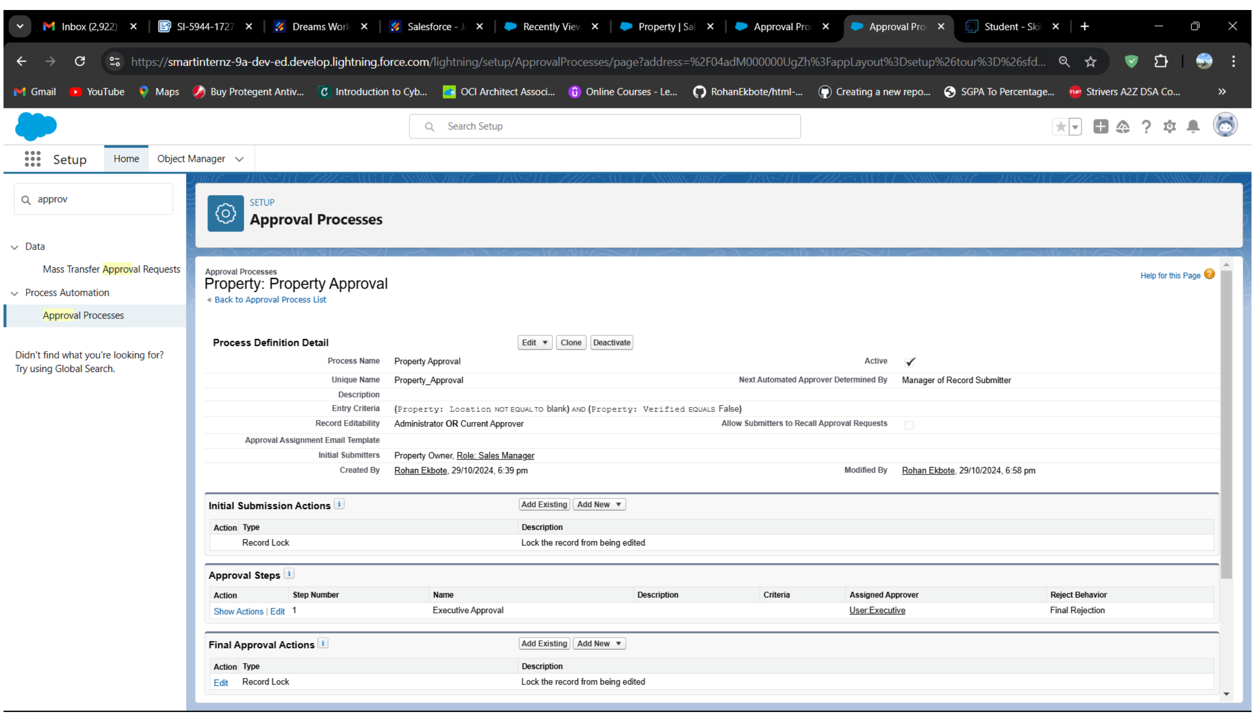

SETUP
Object Manager
Edit Property Custom Field
Verified
Help for this Page
Step 2. Enter the details
Step 2 of 3
Previous
Save
Next
Cancel
Field Label
Verified
Default Value
Checked
Unchecked
Field Name
Verified
Description
Help Text
OneDrive
Screenshot saved
The screenshot was added to your OneDrive.


SETUP
Approval Processes
Data
Mass Transfer Approval Requests
Process Automation
Approval Processes
Didn't find what you're looking for? Try using Global Search.
Approval Process Edit
Property Approval
Help for this Page
Step 2. Specify Entry Criteria
Step 2 of 6
If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.
Specify Entry Criteria
Use this approval process if the following criteria are met
Field
Operator
Value
Property: Location
not equal to
blank
AND
Property: Verified
equals
False
AND
Add Filter Logic...
Previous
Save
Next
Cancel

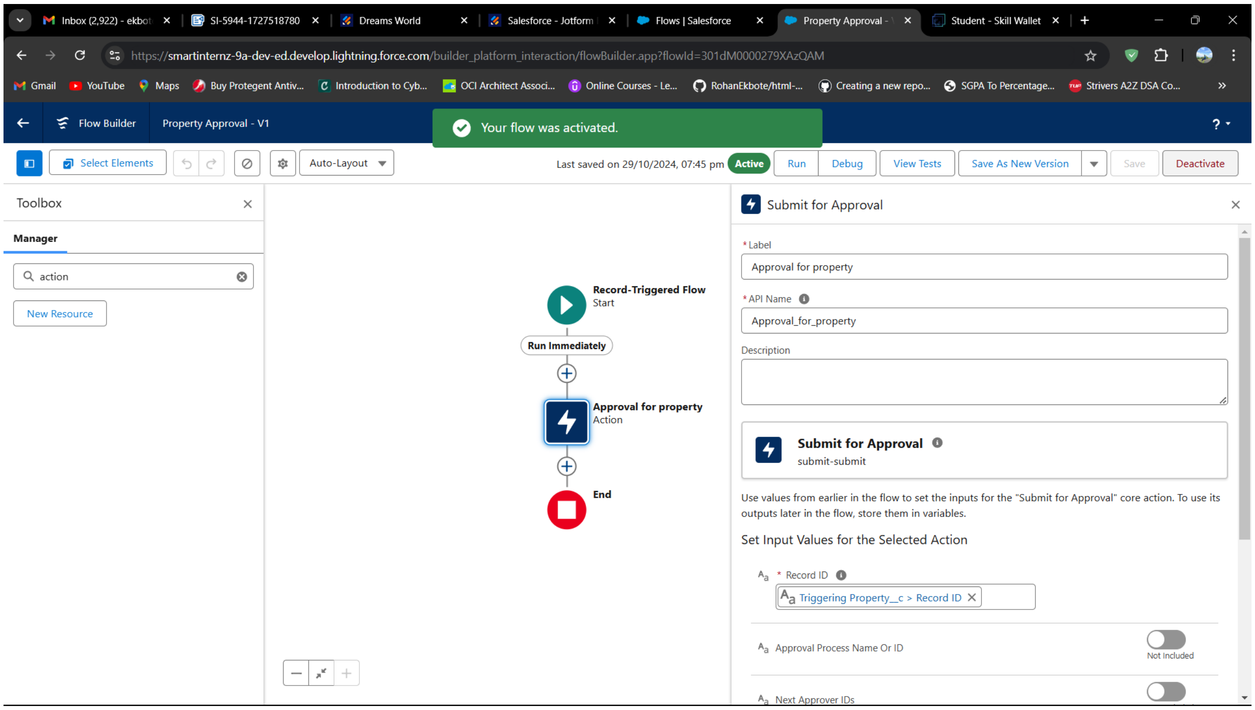

https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowFieldUpdates/page?address=%2F04Y%2Fe%3FretURL%3D%252F04Y
Setup
Home
Object Manager
SETUP
Field Updates
Edit Field Update
Verified Property
Help for this Page
Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.
Field Update Edit
Save
Save & New
Cancel
Identification
= Required Information
Name
Verified Property
Unique Name
Verified_Property
Description
Object
Property
Field to Update
Verified
Field Data Type
Checkbox
Re-evaluate Workflow Rules after Field Change
Specify New Field Value
Checkbox Options
True
False

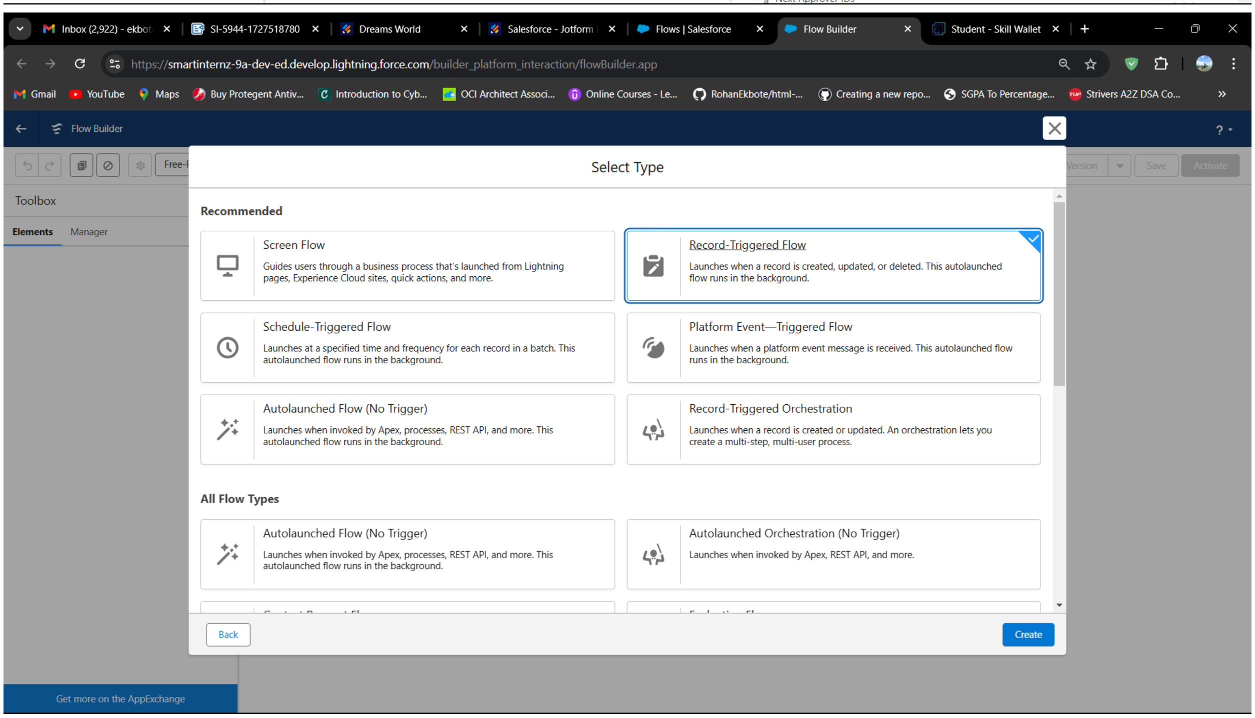

https://smartinternz-9a-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowFieldUpdates/page?address=%2F04Y%2Fe%3FappLayout%3Dsetup%26retURL%3D%252F04Y...
Setup
Home
Object Manager
SETUP
Field Updates
Edit Field Update
UnVerified Property
Help for this Page
Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.
Field Update Edit
Save
Save & New
Cancel
Identification
= Required Information
Name
UnVerified Property
Unique Name
UnVerified_Property
Description
Object
Property
Field to Update
Verified
Field Data Type
Checkbox
Re-evaluate Workflow Rules after Field Change
Specify New Field Value
Checkbox Options
True
False

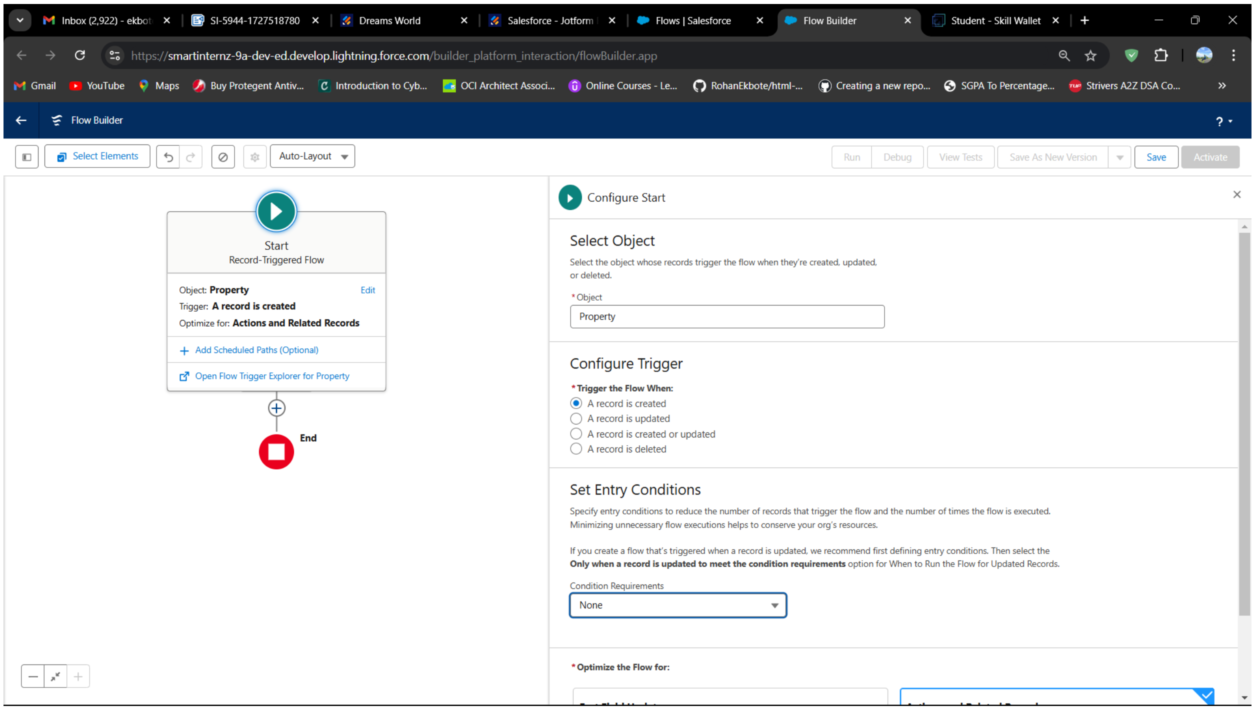

SETUP
Approval Processes
Approval Processes
Property: Property Approval
« Back to Approval Process List
Help for this Page
Process Definition Detail
Edit Clone Delete Activate
Process Name Property Approval
Active
Unique Name Property_Approval
Next Automated Approver Determined By Manager of Record Submitter
Description
Entry Criteria (Property: Location NOT EQUAL TO blank) AND (Property: Created By EQUALS False)
Record Editability Administrator OR Current Approver
Allow Submitters to Recall Approval Requests
Approval Assignment Email Template
Initial Submitters Property Owner, Role: Sales Manager
Created By Rohan Ekbote, 29/10/2024, 6:39 pm
Modified By Rohan Ekbote, 29/10/2024, 6:52 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
Final Approval Actions
Add Existing Add New
Action Type Description
Edit Record Lock Lock the record from being edited


SETUP
Approval Processes
Approval Processes
Property: Property Approval
« Back to Approval Process List
Help for this Page
Process Definition Detail
Edit Clone Deactivate
Process Name Property Approval
Active ✓
Unique Name Property_Approval
Next Automated Approver Determined By Manager of Record Submitter
Description
Entry Criteria (Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS False)
Record Editability Administrator OR Current Approver
Allow Submitters to Recall Approval Requests
Approval Assignment Email Template
Initial Submitters Property Owner, Role: Sales Manager
Created By Rohan Ekbote, 29/10/2024, 6:39 pm
Modified By Rohan Ekbote, 29/10/2024, 6:58 pm
Initial Submission Actions
Add Existing Add New
Action Type Description
Record Lock Lock the record from being edited
Approval Steps
Action Step Number Name Description Criteria Assigned Approver Reject Behavior
Show Actions | Edit 1 Executive Approval User Executive Final Rejection
Final Approval Actions
Add Existing Add New
Action Type Description
Edit Record Lock Lock the record from being edited

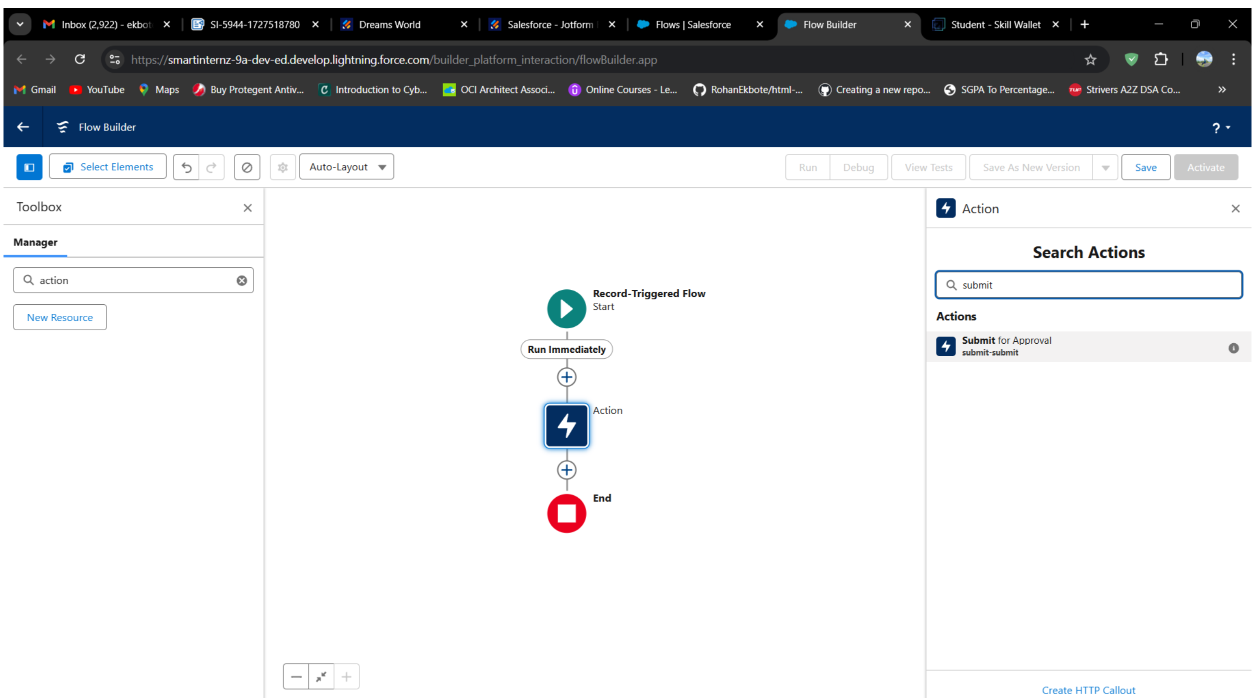
10. Create a Record trigger flow to submit the Approval Process Automatically.



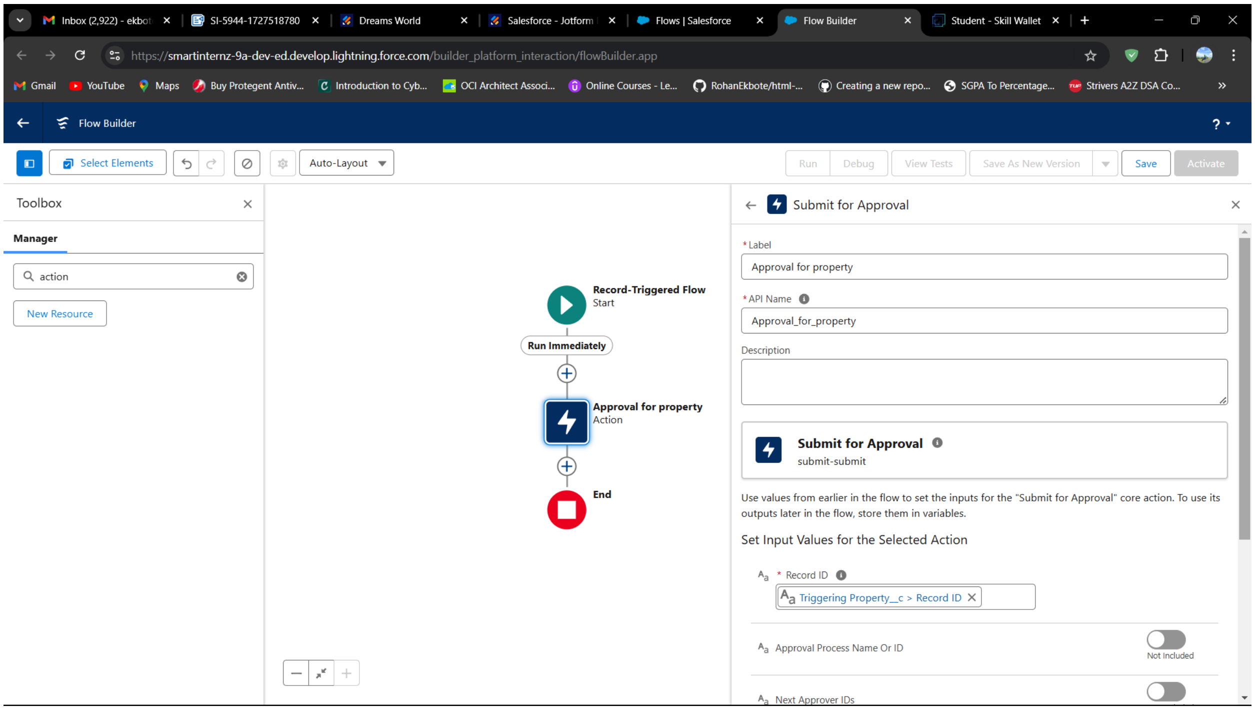


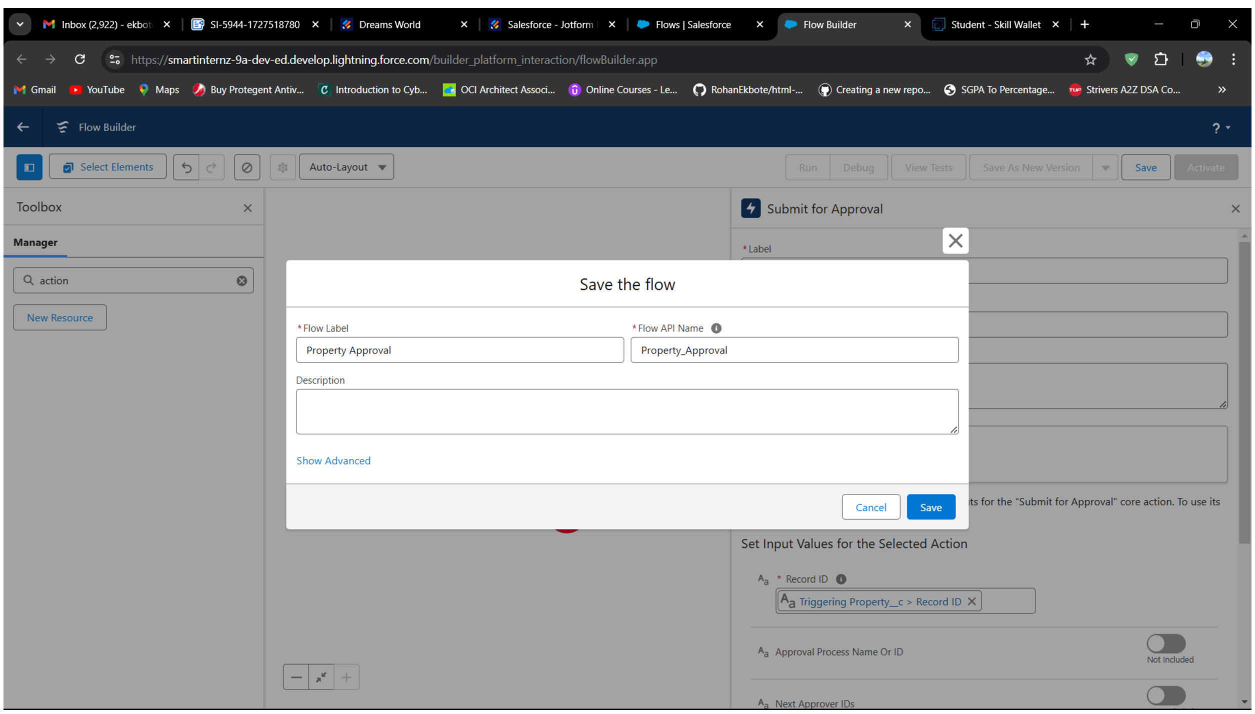


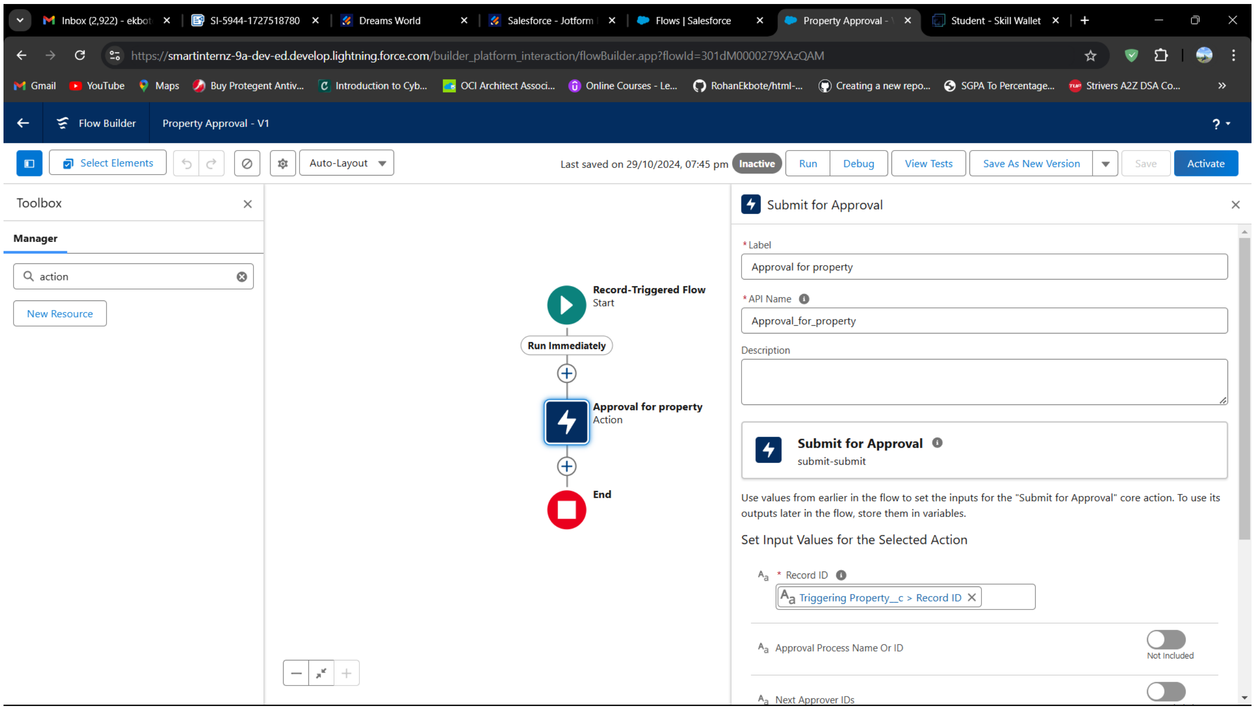
Flow Builder
Configure Start
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
Object
Property
Configure Trigger
Trigger the Flow When:
A record is created
A record is updated
A record is created or updated
A record is deleted
Set Entry Conditions
Condition Requirements
None
Optimize the Flow for:
Start
Record-Triggered Flow
Object: Property
Trigger: A record is created
Optimize for: Actions and Related Records
End



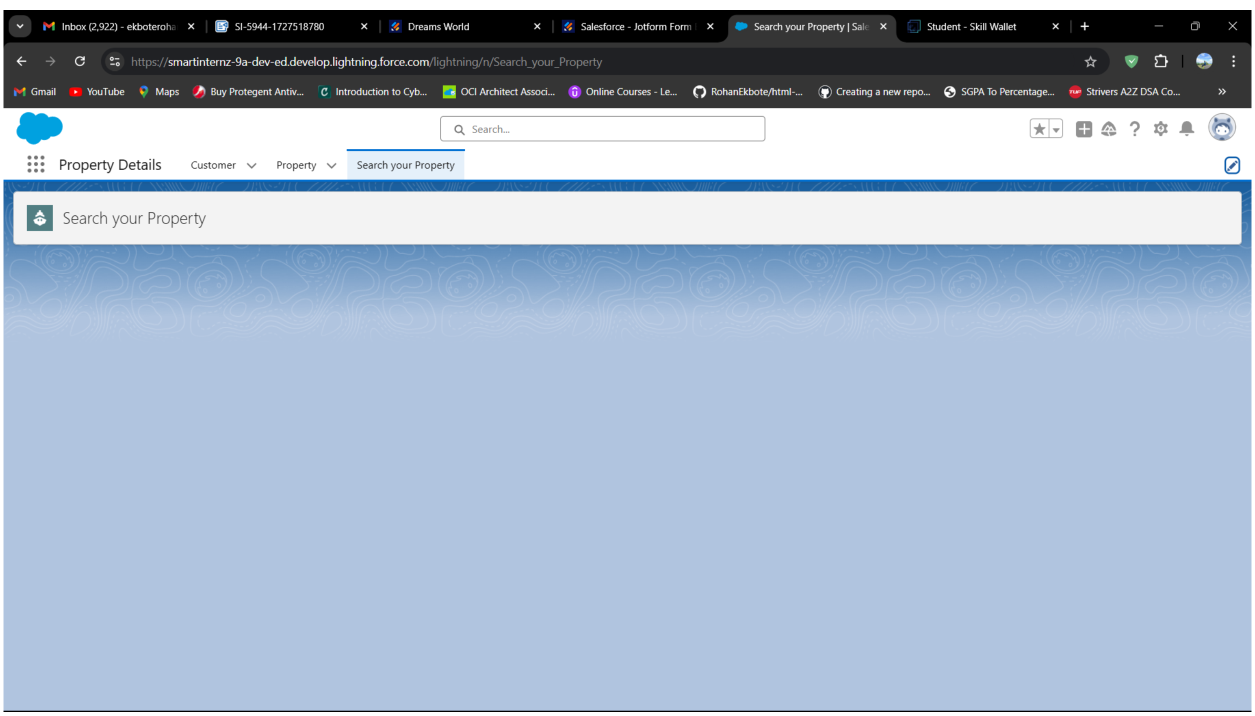
Flow Builder
Toolbox
Manager
action
New Resource
Record-Triggered Flow
Start
Run Immediately
Action
End
Action
Search Actions
submit
Actions
Submit for Approval
submit-submit
Create HTTP Callout

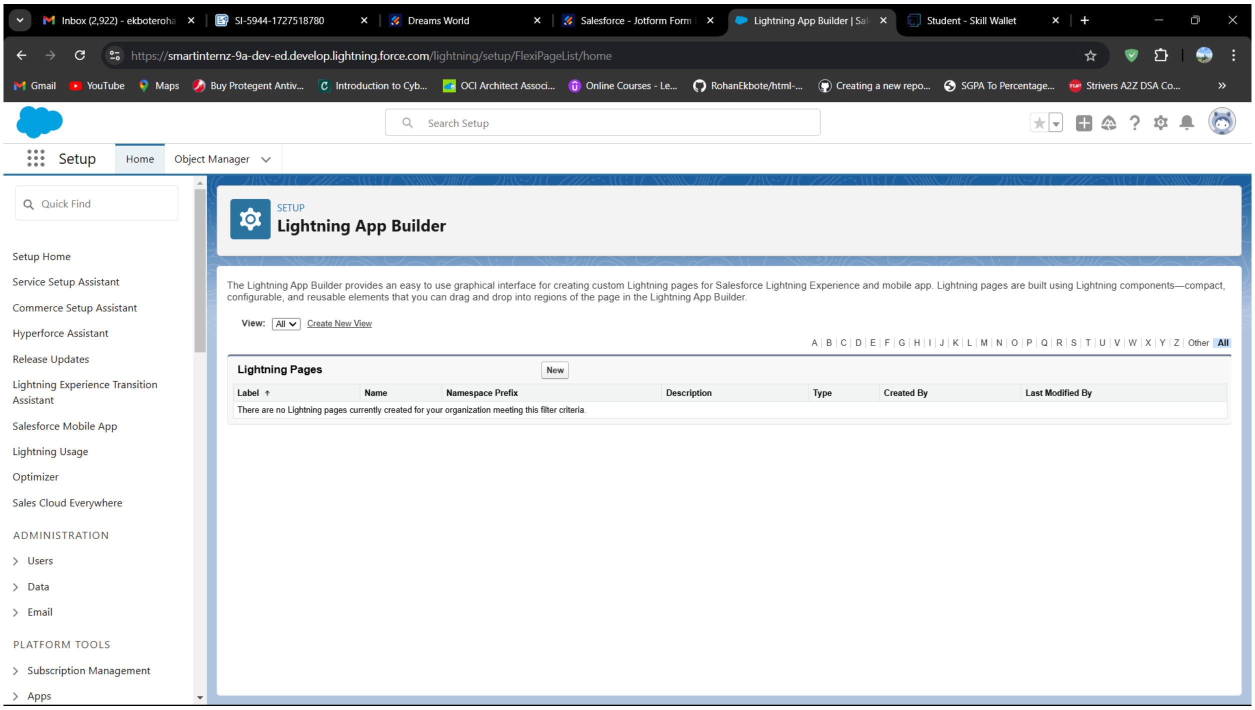

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Toolbox
Manager
action
New Resource
Record-Triggered Flow
Start
Run Immediately
Approval for property
Action
End
Submit for Approval
*Label
Approval for property
*API Name
Approval_for_property
Description
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
* Record ID
Triggering Property__c > Record ID
Approval Process Name Or ID
Not Included
Next Approver IDs

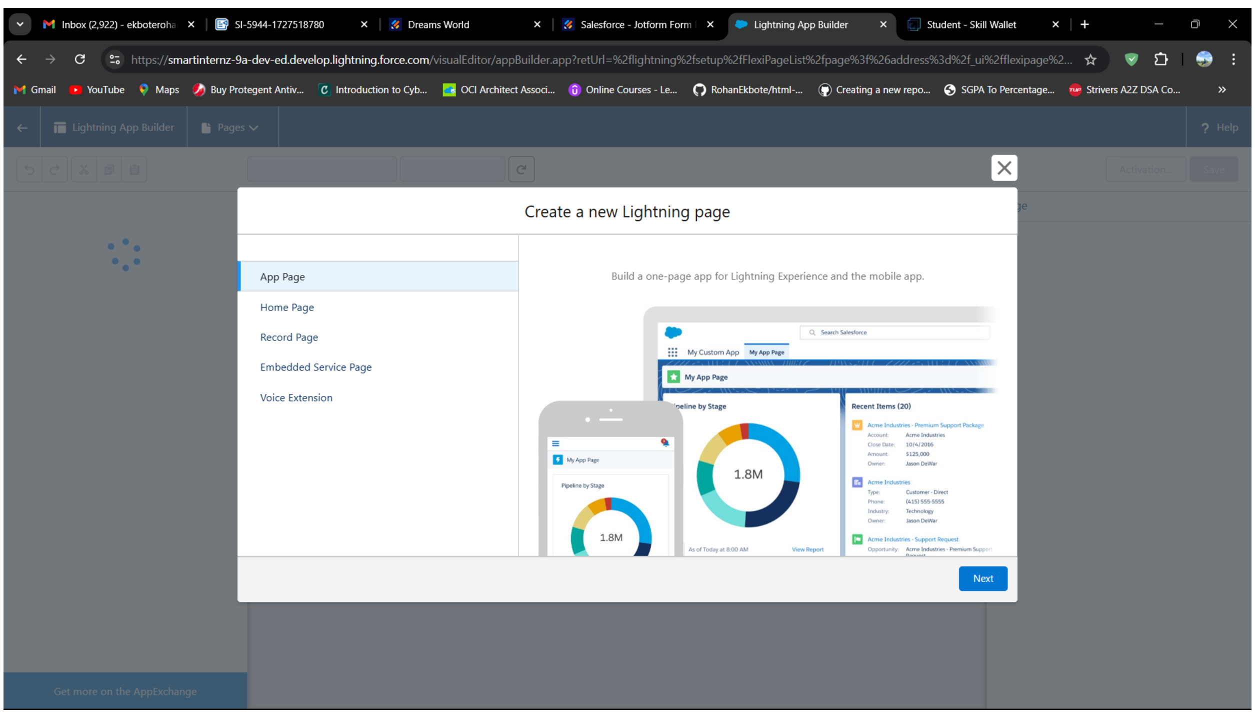

Flow Builder
Select Elements
Auto-Layout
Save
Activate
Toolbox
Manager
action
New Resource
Submit for Approval
Save the flow
*Flow Label
Property Approval
*Flow API Name
Property_Approval
Description
Show Advanced
Cancel
Save
Set Input Values for the Selected Action
* Record ID
Triggering Property__c > Record ID
Approval Process Name Or ID
Not Included
Next Approver IDs

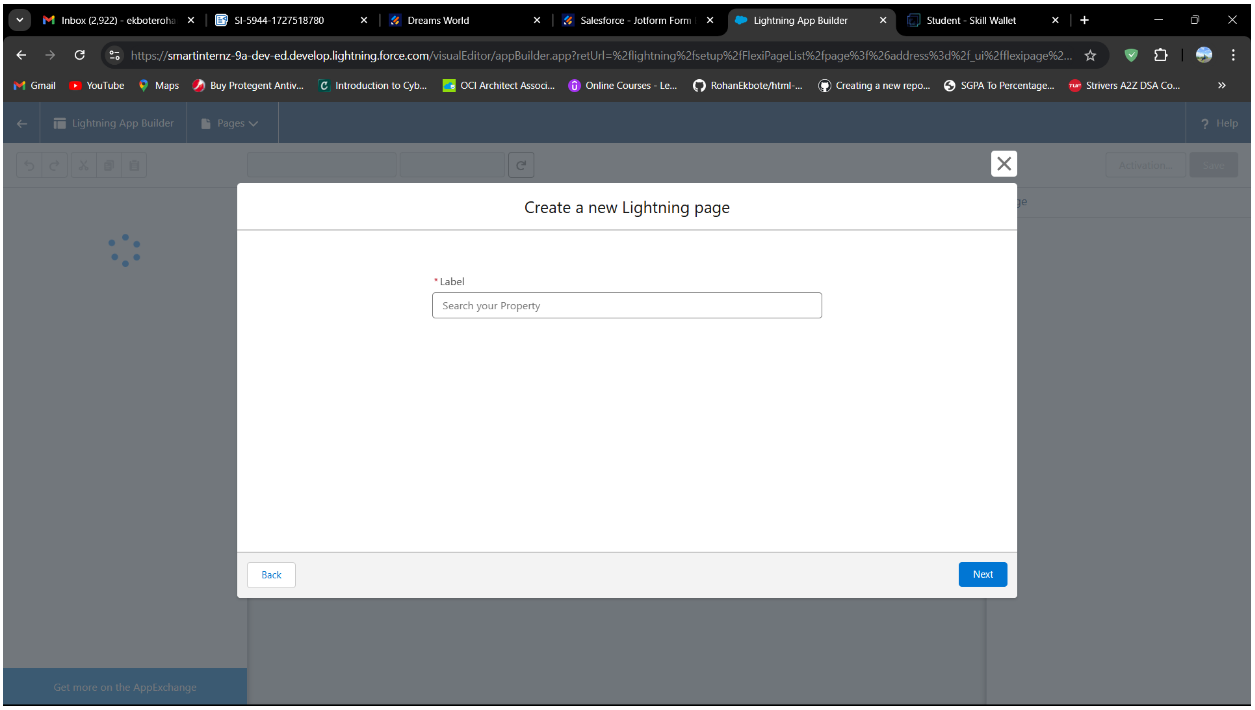


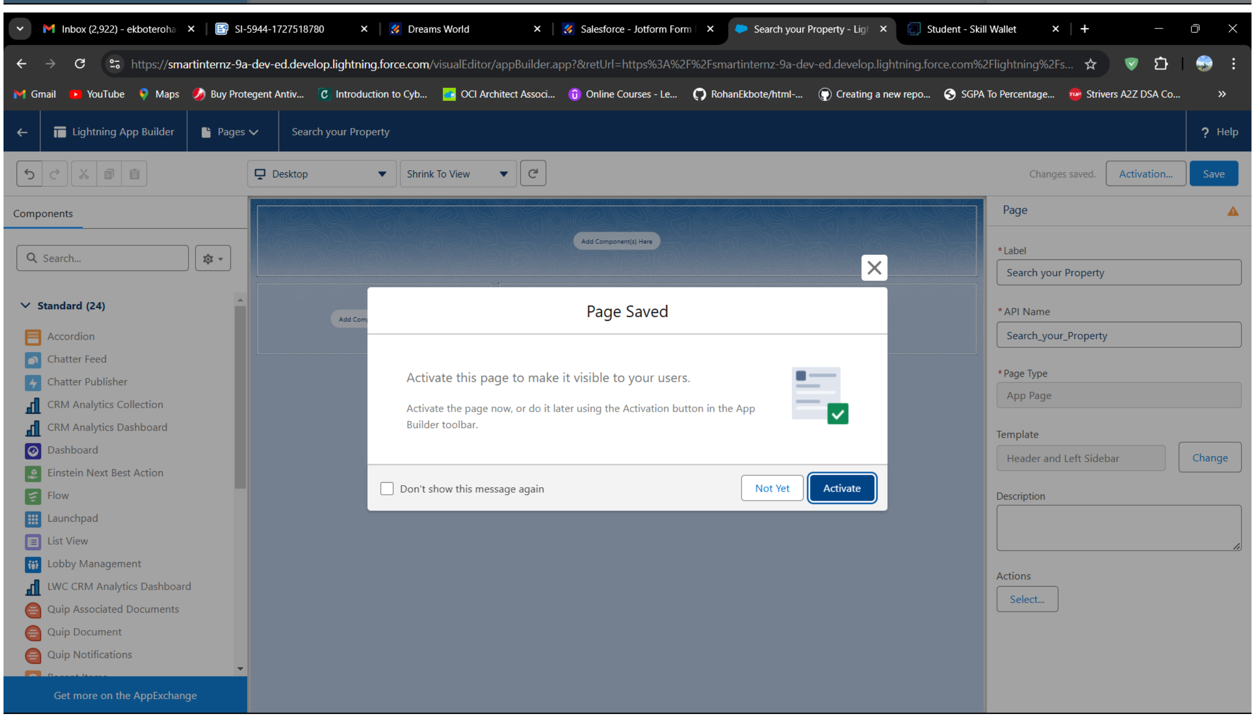
11. Create an App Page

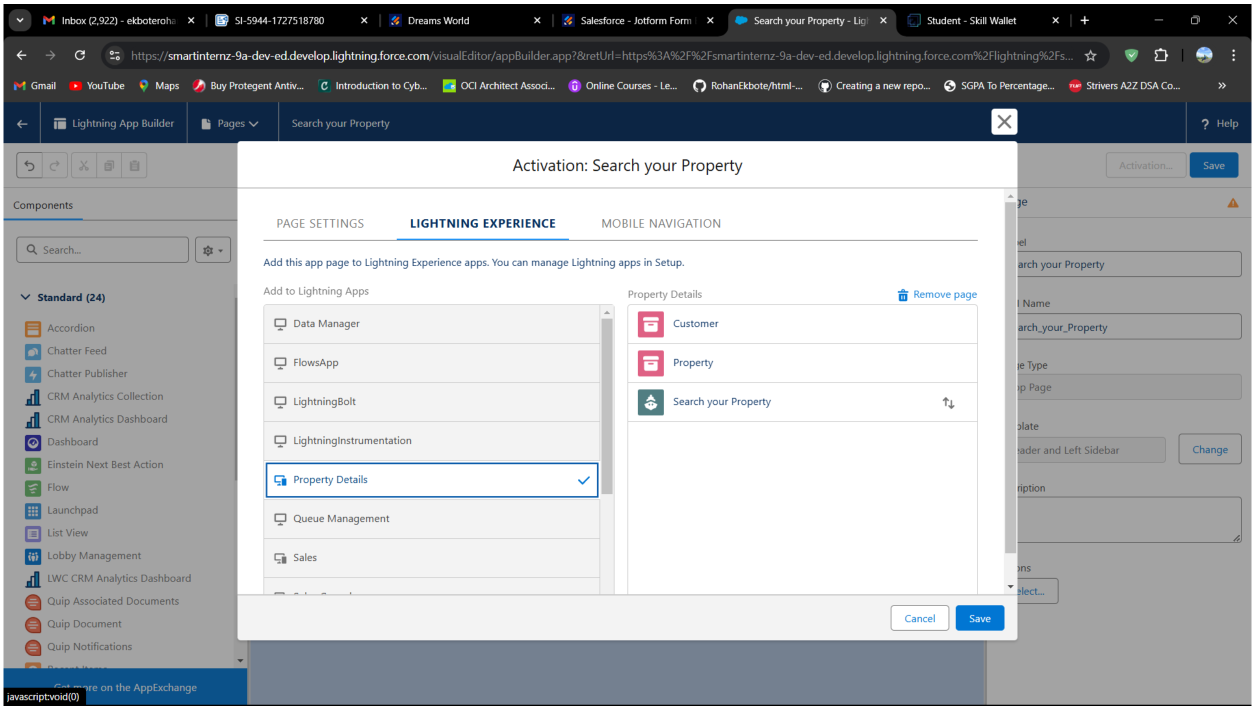




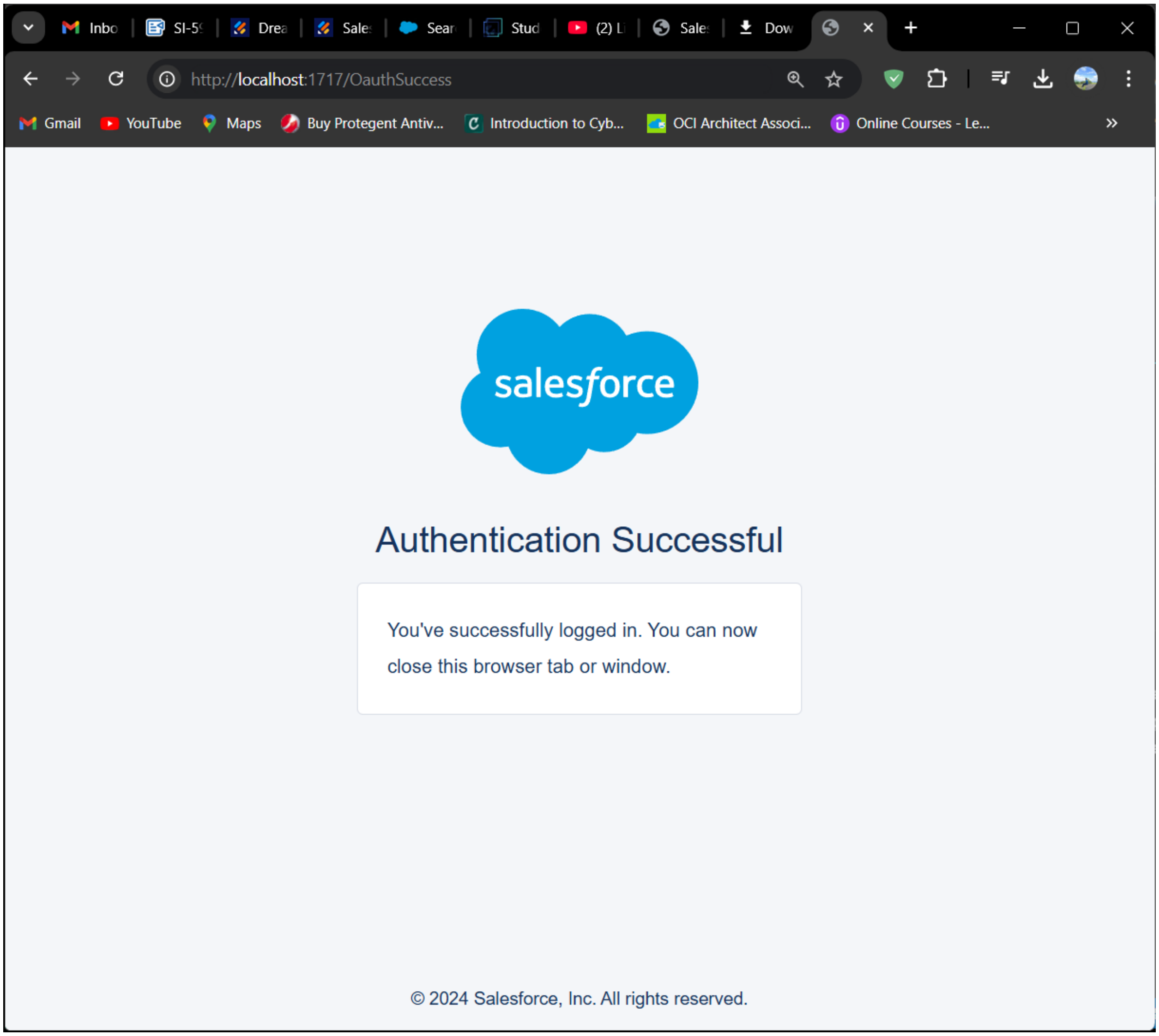


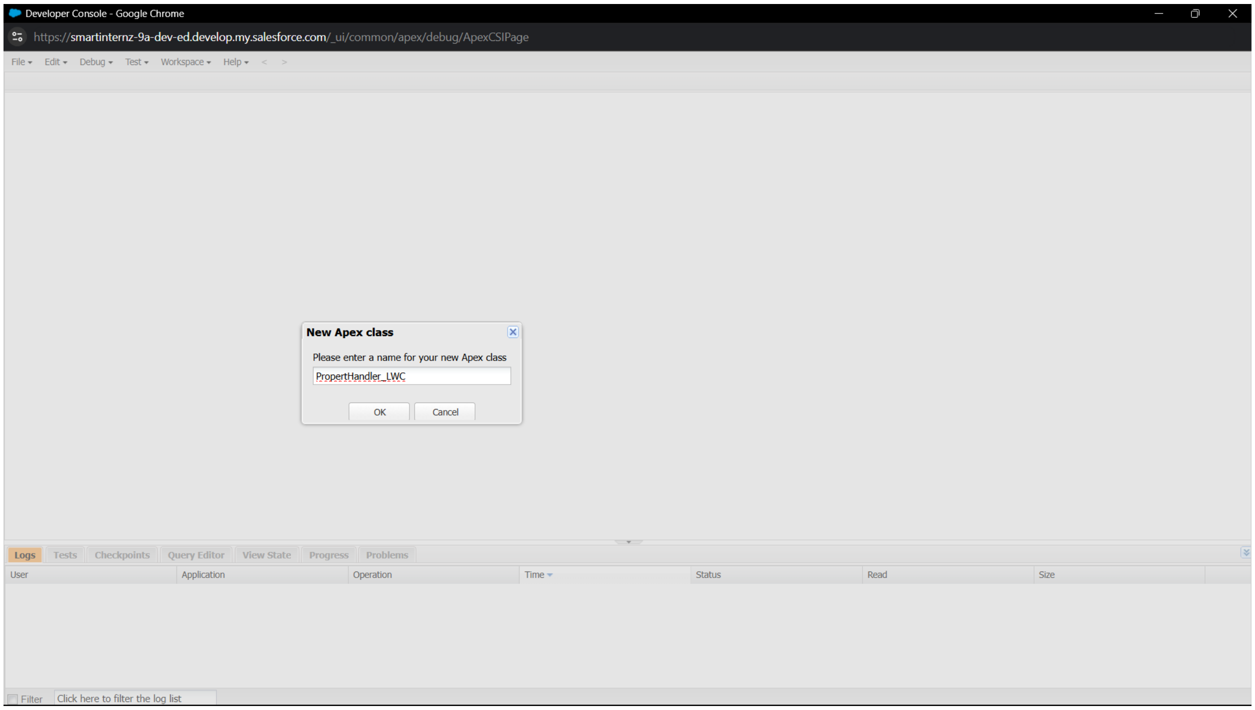

Create a new Lightning page
* Label
Search your Property
Back
Next
Lightning App Builder
Pages
Help
Get more on the AppExchange

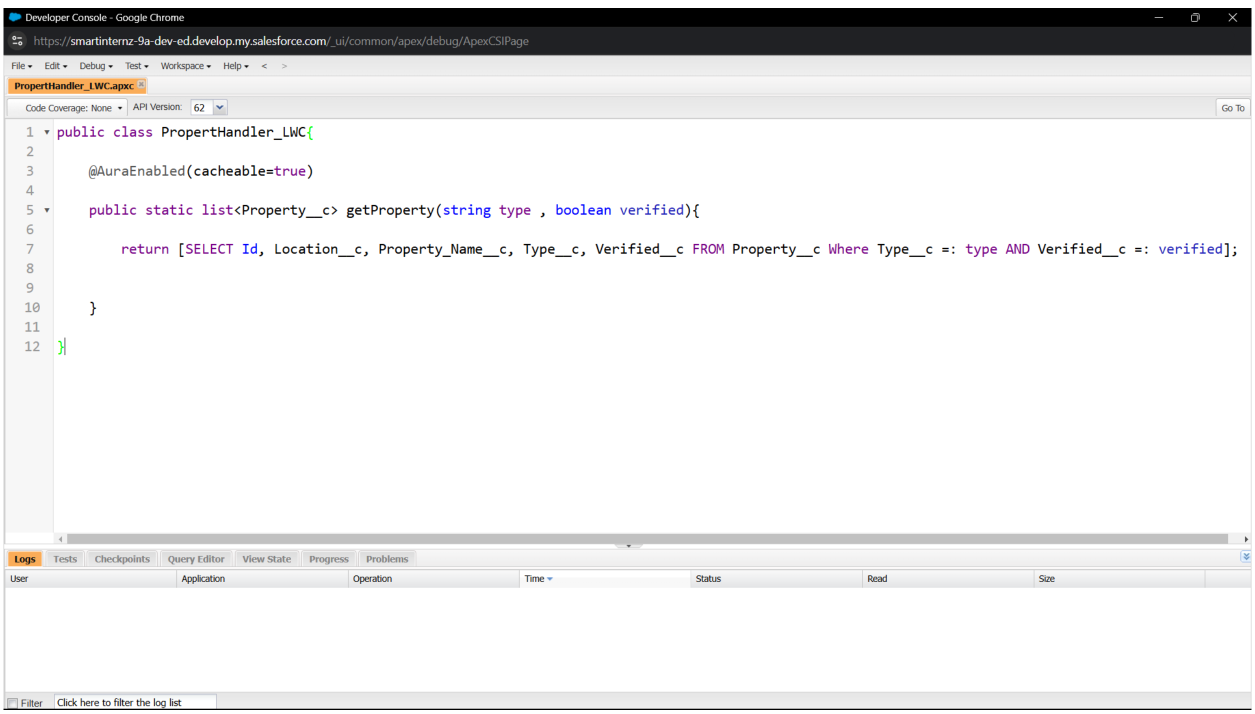

Lightning App Builder
Pages
Search your Property
Help
Desktop
Shrink To View
Changes saved.
Activation...
Save
Components
Standard (24)
Accordion
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Einstein Next Best Action
Flow
Launchpad
List View
Lobby Management
LWC CRM Analytics Dashboard
Quip Associated Documents
Quip Document
Quip Notifications
Get more on the AppExchange
Page Saved
Activate this page to make it visible to your users.
Activate the page now, or do it later using the Activation button in the App Builder toolbar.
Don't show this message again
Not Yet
Activate
Page
* Label
Search your Property
* API Name
Search_your_Property
* Page Type
App Page
Template
Header and Left Sidebar
Change
Description
Actions
Select...

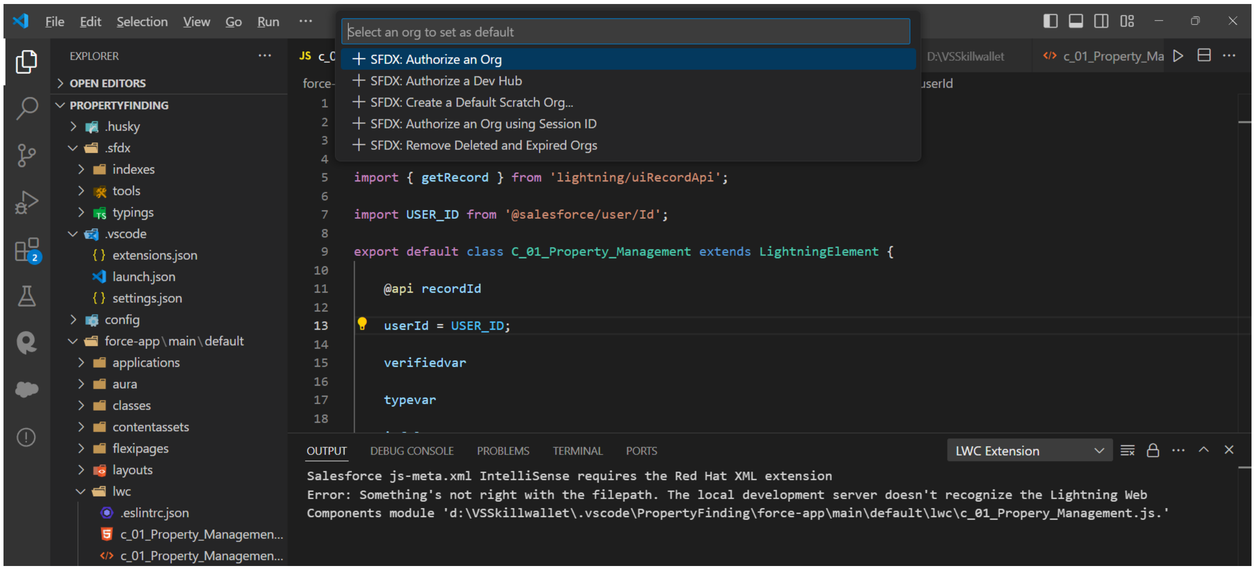


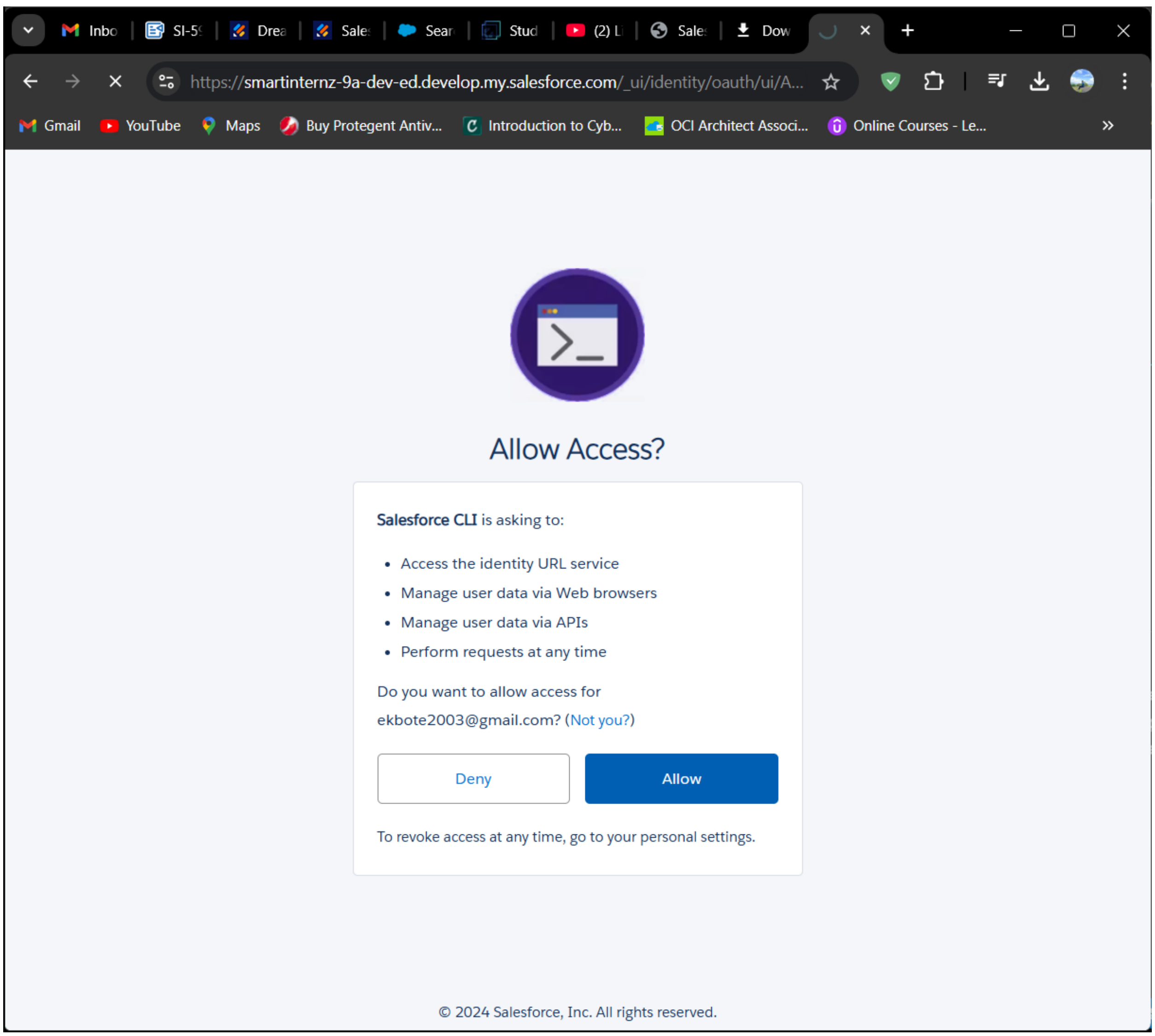
12. Create a LWC Component


http://localhost:1717/OauthSuccess
Gmail
YouTube
Maps
Buy Protegent Antiv...
Introduction to Cyb...
OCI Architect Associ...
Online Courses - Le...
salesforce
Authentication Successful
You've successfully logged in. You can now close this browser tab or window.
© 2024 Salesforce, Inc. All rights reserved.


Developer Console - Google Chrome
https://smartinternz-9a-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
New Apex class
Please enter a name for your new Apex class
PropertHandler_LWC
OK
Cancel
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
Filter Click here to filter the log list


Developer Console - Google Chrome
https://smartinternz-9a-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
PropertHandler_LWC.apxc
Code Coverage: None API Version: 62 Go To
public class PropertHandler_LWC{
@AuraEnabled(cacheable=true)
public static list<Property__c> getProperty(string type , boolean verified){
return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM Property__c Where Type__c =: type AND Verified__c =: verified];
}
}
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
Filter Click here to filter the log list


File Edit Selection View Go Run ···
Select an org to set as default
SFDX: Authorize an Org
SFDX: Authorize a Dev Hub
SFDX: Create a Default Scratch Org...
SFDX: Authorize an Org using Session ID
SFDX: Remove Deleted and Expired Orgs
EXPLORER
OPEN EDITORS
PROPERTYFINDING
.husky
.sfdx
indexes
tools
typings
.vscode
extensions.json
launch.json
settings.json
config
force-app\main\default
applications
aura
classes
contentassets
flexipages
layouts
lwc
.eslintrc.json
c_01_Property_Managemen...
c_01_Property_Managemen...
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
OUTPUT DEBUG CONSOLE PROBLEMS TERMINAL PORTS
LWC Extension
Salesforce js-meta.xml IntelliSense requires the Red Hat XML extension
Error: Something's not right with the filepath. The local development server doesn't recognize the Lightning Web Components module 'd:\VSSkillwallet\.vscode\PropertyFinding\force-app\main\default\lwc\c_01_Propery_Management.js.'


https://smartinternz-9a-dev-ed.develop.my.salesforce.com/_ui/identity/oauth/ui/A...
Gmail YouTube Maps Buy Protegent Antiv... Introduction to Cyb... OCI Architect Associ... Online Courses - Le...
Allow Access?
Salesforce CLI is asking to:
Access the identity URL service
Manage user data via Web browsers
Manage user data via APIs
Perform requests at any time
Do you want to allow access for ekbote2003@gmail.com? (Not you?)
Deny
Allow
To revoke access at any time, go to your personal settings.
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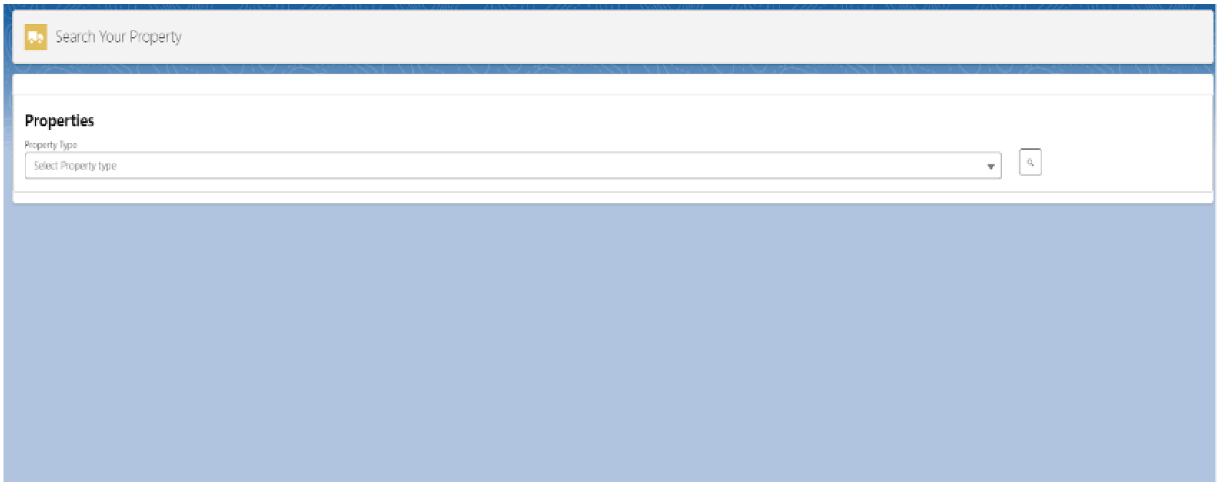
13. Drag this Component to your App Page



14. Give Access of Apex Classes to Profiles