

Project Review/Documentation link (Google Docs):

<https://docs.google.com/document/d/17kQWiBiKHZzctYR2rnzPZ-R5ETMLhTUZgKIKsz-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>

The screenshot shows a web browser window with multiple tabs open at the top. The active tab displays a survey form titled "Dreams World". The form includes fields for Name (First Name and Last Name), Email (with placeholder "example@example.com"), and Phone Number (with placeholder "(000) 000-0000" and a validation message "Please enter a valid phone number."). There is also a question "Which type of property are you looking for?" with three options: Residential, Commercial, and Rental, each represented by a small square checkbox.

2.Customer & Property Object Created

The screenshot shows the Salesforce Object Manager interface. At the top, there are several tabs: Dreams World, Student - Skill W, RohanEkbote/A..., Object Manager (which is active), Download history, Dreams World, RohanEkbote/A..., RohanEkbote/A..., and a plus sign. Below the tabs is a search bar labeled "Search Setup". The main area is titled "Object Manager" with a "SETUP" icon. It displays a list of objects, with one row highlighted: "Customer" (Label), "Customer__c" (Name), and "Custom Object" (Type). The last column contains the creation date, "28/09/2024", and a checkmark icon. The list also includes other standard objects like Credit Memo, Credit Memo Line, and Data Use Legal Basis.

Label	Name	Type
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object
Credit Memo	CreditMemo	Standard Object
Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object
Credit Memo Line	CreditMemoLine	Standard Object
Customer	Customer__c	Custom Object
Customer	Customer	Standard Object
D&B Company	DandBCompany	Standard Object
Data Use Legal Basis	DataUseLegalBasis	Standard Object
Data Use Purpose	DataUsePurpose	Standard Object

The screenshot shows the Salesforce Object Manager interface. At the top, there are several tabs: Dreams World, Student - Skill W, RohanEkbote/A..., Object Manager (which is active), Download history, Dreams World, RohanEkbote/A..., RohanEkbote/A..., and a plus sign. Below the tabs is a search bar labeled "Search Setup". The main area is titled "Object Manager" with a "SETUP" icon. It displays a list of objects, with one row highlighted: "Property" (Label), "Property__c" (Name), and "Custom Object" (Type). The last column contains the creation date, "28/09/2024", and a checkmark icon. The list also includes other standard objects like Promotion Segment Buyer Group, Promotion Segment Sales Store, and Queue.

Label	Name	Type
Promotion Segment Buyer Group	PromotionSegmentBuyerGroup	Standard Object
Promotion Segment Sales Store	PromotionSegmentSalesStore	Standard Object
Promotion Target	PromotionTarget	Standard Object
Promotion Tier	PromotionTier	Standard Object
Property	Property__c	Custom Object
Queue	LocationWaitlist	Standard Object
Queue Messaging Template	LocWaitlistMsgTemplate	Standard Object
Queued Party	LocationWaitlistedParty	Standard Object
Quick Text	QuickText	Standard Object
Recommendation	Recommendation	Standard Object

3. Integrate Jotform with Salesforce Platform

The screenshot shows the Jotform integration settings for a form titled "Dreams World". The "BUILD" tab is selected. On the left sidebar, under "INTEGRATIONS", the "Salesforce" option is highlighted. The main area displays a mapping between Jotform fields and Salesforce fields:

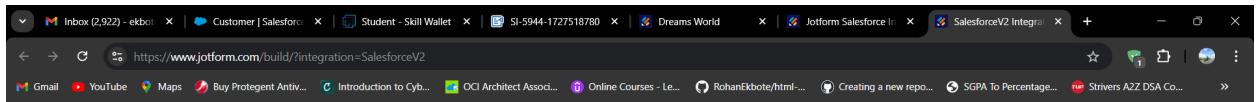
Object Fields	Dreams World
Customer__c	Name - First Name
City	Address - City
Budget Amount	Budget Amount
Property Type	Which type of property are you looking for?
Phone Number	Phone Number
Street Address	Address - Street Address
Email	Email
Name	Name - Last Name
State	Address - State
Street Address line 2	Address - Street Address 2

Below the mapping table, there is a section for "Update an existing record" with a toggle switch set to "OFF".

The screenshot shows the Jotform dashboard with the "My Forms" section selected. On the left sidebar, under "INTEGRATIONS", the "Salesforce" option is highlighted. The main area displays a list of forms, with "Dreams World" being the active form. The "INTEGRATIONS" sidebar on the right lists various integration categories and their corresponding icons:

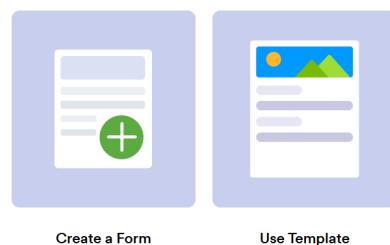
INTEGRATIONS	FEATURED INTEGRATIONS
CRM	Microsoft Teams
Storage	Slack
Payment	Mailchimp
Email	Dropbox
	Salesforce
	PayPal
	Google Sheets
	Zoom
	Google Calendar

At the bottom of the sidebar, there are links to "See 100+ integrations >" and "See more >".



Add the Salesforce integration to a form

Send form responses to Salesforce



Create a Form

Use Template

A screenshot of the Jotform Form Builder interface. The top navigation bar includes "Jotform", "Form Builder", "Dreams World" (the current form name), "Last edited at Sat, Sep 28, 2024", and "Preview Form". The main interface has tabs for "BUILD", "SETTINGS", and "PUBLISH", with "BUILD" selected. On the left, a sidebar lists "FORM SETTINGS", "EMAILS", "CONDITIONS", "THANK YOU PAGE" (which is checked), "INTEGRATIONS" (highlighted in blue), "WORKFLOWS / Formerly Approvals", "JOTFORM SIGN", and "MOBILE NOTIFICATIONS". The main content area shows the "SALESFORCE" integration setup. It starts with a "Select a Salesforce Object" dropdown set to "Customer". Below it is a "Create a record" section with a note: "Send data from form fields to matched Salesforce fields". This section contains a "Object Fields" column and a "Dreams World" column with field mappings: Customer__c to Name - First Name, City to Address - City, Budget Amount to Budget Amount, Property Type to Which type of property are you lookin..., Phone Number to Phone Number, Street Address to Address - Street Address, and Email to Email. A "Give Feedback" button is at the bottom right of this section.

4. Create Roles

The screenshot shows the Salesforce Setup Roles page. At the top left is a blue square icon with a white person symbol. To its right, the word "SETUP" is written in white capital letters. Below "SETUP" is the word "Roles" in a larger, bold black font. The main content area displays a hierarchical list of roles:

- 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

5. Create a Property Details App

The screenshot shows a browser window with multiple tabs open. The active tab is 'https://smartinternz-9a-dev-ed.lightning.force.com/lightning/o/Customer_c/list?filterName=_Recent'. The page title is 'Property Details' and the sub-page title is 'Customer'. The main content area displays a list view for the 'Customer' object. The list view includes columns for Customer, Phone Number, Email, State, Property Type, Budget Amount, Street Address, Street Address II, and City. A search bar at the top right says 'Search this list...'. Below the list, a message reads: 'You haven't viewed any Customer recently. Try switching list views.' There are buttons for 'New', 'Change Owner', 'Import', and 'Assign Label'.

The screenshot shows a browser window with multiple tabs open. The active tab is 'https://smartinternz-9a-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home'. The page title is 'App Manager | Salesforce'. The main content area is titled 'New Lightning App' and 'Navigation Items'. It instructs users to choose items to include in the app and arrange the order. It notes that users can personalize the navigation to add or move items, but users can't remove or rename the items that they add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support. On the left, there's a sidebar with 'Setup' and 'Object Manager' tabs. The main area has two sections: 'Available Items' and 'Selected Items'. In 'Available Items', there is a search bar with 'prop' typed in. In 'Selected Items', there are two items: 'Customer' and 'Property'. At the bottom, there are 'Back' and 'Next' buttons, and a table showing other available apps like Sales, Sales Console, and Chatter.

ID	App Name	Label	Description	Last Modified	Status	Action
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	27/09/2024, 10:23 pm	Lightning	✓
16	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	27/09/2024, 10:23 pm	Lightning	✓
17	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	27/09/2024, 10:23 pm	Classic	✓

6. Create Profiles

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, there's a sidebar with a search bar and links for Users and Profiles. The main area displays a grid of profiles with columns for Business Brands, Communication Subscriptions, Communication Subscription Channel Types, Communication Subscription Consents, Communication Subscription Timings, Contacts, Contact Point Addressers, Contact Point Consents, Contact Point Emails, Ideas, Labels, Locations, Party Consents, Push Topics, Sellers, Streaming Channels, and User External Credentials. Below this is a section for Custom Object Permissions for Customer and Property objects, showing various access levels (Read, Create, Edit, Delete, View All, Modify All). At the bottom, there are Session Settings (Session Times Out After: 2 hours of inactivity) and Password Policies (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered, Minimum password length: 8).

The screenshot shows the Salesforce Setup interface under the Profiles section, specifically the Clone Profile page. It prompts the user to enter the name of the new profile. A note at the top says "You must select an existing profile to clone from." Below this, there are fields for Existing Profile (Standard Platform User), User License (Salesforce Platform), and Profile Name (Customer). At the bottom right are Save and Cancel buttons.

Screenshot of the Salesforce Setup - Profiles page. The URL is https://smartinternz-9a-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM000007mx8D%2Fe%3FretURL%3D%252F00edM000007mx8... . The page shows a grid of permissions for various objects across different profile levels (Basic Access, Create, Edit, Delete, View All, Modify All).

Object	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>											
Addresses	<input type="checkbox"/>											
Assets	<input type="checkbox"/>											
Authorization Forms	<input type="checkbox"/>											
Authorization Form Consents	<input type="checkbox"/>											
Authorization Form Data Uses	<input type="checkbox"/>											
Authorization Form Texts	<input type="checkbox"/>											
Background Operations	<input type="checkbox"/>											
Business Brands	<input type="checkbox"/>											
Communication Subscriptions	<input type="checkbox"/>											
Communication Subscription Channel Types	<input type="checkbox"/>											
Communication Subscription Consents	<input type="checkbox"/>											
Communication Subscription Timings	<input type="checkbox"/>											
Contacts	<input type="checkbox"/>											
Contact Point Addresses	<input type="checkbox"/>											
Contact Point Consents	<input type="checkbox"/>											

Screenshot of the Salesforce Setup - Profiles page. The URL is https://smartinternz-9a-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM000007mx8D%2Fe%3FretURL%3D%252F00edM000007mx8... . This view shows a subset of the permission grid, including rows for Communication Subscription Timings, Contacts, Contact Point Addresses, Contact Point Consents, Contact Point Emails, and various system objects like Party Consents, Push Topics, Sellers, Streaming Channels, and User External Credentials.

Object	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Communication Subscription Timings	<input type="checkbox"/>											
Contacts	<input type="checkbox"/>											
Contact Point Addresses	<input type="checkbox"/>											
Contact Point Consents	<input type="checkbox"/>											
Contact Point Emails	<input type="checkbox"/>											
Party Consents	<input type="checkbox"/>											
Push Topics	<input type="checkbox"/>											
Sellers	<input type="checkbox"/>											
Streaming Channels	<input type="checkbox"/>											
User External Credentials	<input type="checkbox"/>											

Below the main grid, there are sections for Custom Object Permissions (Customer object shown) and Session Settings (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None). The Password Policies section includes fields for 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), and Lockout effective period (15 minutes).

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'Users'. A search bar at the top right contains the text 'Search Setup'. Below the header, there's a sidebar with a 'Setup' icon and links for 'Home' and 'Object Manager'. The main content area has a title 'Profiles' with a user icon. It displays a table titled 'All Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists various profiles such as 'Analytics Cloud Integration User', 'Authenticated Website', 'External Apps Login', etc. At the bottom of the table, there are navigation buttons for 'Previous' and 'Next'.

The screenshot shows the Salesforce Setup interface with the 'Clone Profile' dialog open. The dialog title is 'Clone Profile' with a user icon. It prompts the user to 'Enter the name of the new profile.' Below this, a note says 'You must select an existing profile to clone from.' There are two radio button options: 'Existing Profile' (selected) and 'Standard Platform User'. Under 'Existing Profile', there are sub-options: 'User License' (selected) and 'Salesforce Platform'. A text input field labeled 'Profile Name' contains the value 'Manager'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Screenshot of the Salesforce Setup interface showing the 'Profiles' page.

Profile Edit Manager

Name: Manager
User License: Salesforce Platform
Description: [Empty]

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Property Details (Property_Details)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>
Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Home	Default On	Inventory Reservations	Tab Hidden
Accounts	Default On	Invoices	Tab Hidden
All Sites	Tab Hidden	Labels	Default On

Screenshot of the Salesforce Setup interface showing the 'Standard Object Permissions' page.

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 <small>1</small>	Modify All <small>1</small>	Read	Create	Edit	Delete	View All <small>1</small>	Modify All <small>1</small>
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	Contact Point Phones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Addresses	<input type="checkbox"/>				<input type="checkbox"/>		Contact Point Type Consents	<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"/>			Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Forms	<input type="checkbox"/>	<input type="checkbox"/>	D&B Companies	<input type="checkbox"/>								
Authorization Form Consents	<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"/>				
Authorization Form Data Uses	<input type="checkbox"/>	<input type="checkbox"/>	Data Use Purposes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Authorization Form Texts	<input type="checkbox"/>	<input type="checkbox"/>	Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Background Operations	<input type="checkbox"/>						Engagement Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Brands	<input type="checkbox"/>	<input type="checkbox"/>	Ideas	<input type="checkbox"/>								
Communication Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	Individuals	<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"/>	Labels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Communication Subscription Consents	<input type="checkbox"/>	<input type="checkbox"/>	Locations	<input type="checkbox"/>								
Communication Subscription Timings	<input type="checkbox"/>	<input type="checkbox"/>	Party Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	Push Topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	Sellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The page title is 'Profiles'. A search bar at the top right contains 'Search Setup'. Below the title, there's a message: 'Didn't find what you're looking for? Try using Global Search.' On the left, a sidebar shows 'Users' and 'Profiles' under 'Profiles'. The main content area has a table titled 'All Profiles' with columns: Action, Profile Name, User License, and Custom. The table lists various profiles like 'High Volume Customer Portal', 'Identity User', 'Marketing User', etc. The 'Marketing User' profile is highlighted with a blue background. At the bottom of the table, it says '26-43 of 43' and '0 Selected'. A navigation bar at the bottom right includes 'Page 2 of 2'.

7. Create a Check Box field on user

The screenshot shows the Salesforce Setup interface with the 'User Fields & Relationships' page open. The page title is 'User'. A sidebar on the left lists various setup categories. The main content area shows a 'Custom Field Definition Detail' for a field named 'Verified'. The field is of type 'Checkbox' and is associated with the 'User' object. The 'Field Information' section shows details like Field Label ('Verified'), Field Name ('Verified'), API Name ('Verified__c'), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, and creation information ('Created By: Rohan Ekbote, 29/10/2024, 6:00 pm'). The 'General Options' section shows 'Default Value: Unchecked'. The 'Validation Rules' section indicates 'No validation rules defined.' A 'Validation Rules Help' link is available. Navigation links include 'Back To Top' and 'Always show me more records per related list'.

Screenshot of the Salesforce Setup interface showing the Fields & Relationships section for the User object.

The page title is "User | Fields & Relationships".

The left sidebar shows "Fields & Relationships" selected under "User".

The main content area displays a table titled "Fields & Relationships" with the following columns:

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)		

Screenshot of the Salesforce Setup interface showing the process of creating a new custom field for the User object.

The page title is "User | New Custom Field".

The left sidebar shows "Fields & Relationships" selected under "User".

The main content area shows "Step 2. Enter the details" of the custom field creation process.

The form fields are as follows:

- Field Label:
- Default Value: Checked
- Field Name:
- Description:
- Help Text:
- Auto add to custom report type:
- Add this field to existing custom report types that contain this entity:

Buttons at the bottom right include "Previous", "Next", and "Cancel".

8. Create Users

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar is expanded, showing the 'User Management Settings' section under 'Users'. The main area displays the 'New User' form. The 'General Information' tab is selected, showing fields for First Name (Executive), Last Name (Executive), Alias (exec), Email, Username, Nickname, Title, Company, Department, and Division. On the right side, there are dropdown menus for Role (Sales Executive), User License (Salesforce), Profile (System Administrator), and Active status (checked). Other optional settings include 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 (checked), Debug Mode, and Quick Access Menu.

This screenshot shows the continuation of user creation. The setup interface remains largely the same, with the 'User Management Settings' section still selected in the sidebar. The 'New User' form is filled out with different information: First Name (Manager), Last Name (Manager), Alias (mana), Email (user26757@gmail.com), Username (user26757@gmail.com), Nickname (User1730205867932684728), Title, Company, Department, and Division. The right-hand configuration panel shows the Role set to Sales Manager, User License to Salesforce Platform, and Profile to Manager. The Active checkbox is checked. The 'Load Lightning Pages While Scrolling' option is also checked. The rest of the settings are identical to the first user's configuration.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, the navigation sidebar includes links for 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, and Users (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users). The main content area displays the 'New User' page under the 'User Edit' section. The 'General Information' tab is active, showing fields for First Name (Customer), Last Name (Customer), Alias (cust), Email (empty), Username (empty), Nickname (empty), Title (empty), Company (empty), Department (empty), and Division (empty). To the right, there are sections for Role (Customer), User License (Salesforce Platform), Profile (Customer), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), Data.com User Type (None), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only) (unchecked), High-Contrast Palette on Charts (unchecked), Load Lightning Pages While Scrolling (checked), Debug Mode (unchecked), and Quick Access Menu (checked). A 'Help for this Page' link is also present.

This screenshot is nearly identical to the one above, showing the 'New User' page in the Salesforce Setup interface. The main difference is the user profile selected in the 'Profile' dropdown, which has been changed to 'Customer2'. The rest of the page, including the General Information fields and the right-hand configuration options, remains the same.

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app [Let's Go](#)

View: [All Users](#) | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty0dddm00000c4u4uai6nobjlfm@chatter.salesforce.com	Customer	<input checked="" type="checkbox"/>	Chatter Free User
Edit	Customer	cust	user3567@gmail.com	Customer	<input checked="" type="checkbox"/>	Customer
Edit	Customer2	cust	user45646@gmail.com	Customer	<input checked="" type="checkbox"/>	Customer
Edit	Ekkote Rohan	REKbo	skbote2003@gmail.com	Sales Executive	<input checked="" type="checkbox"/>	System Administrator
Edit	Executive	sexec	user14564@gmail.com	Sales Manager	<input checked="" type="checkbox"/>	System Administrator
Edit	Manager	mana	user26757@gmail.com	Sales Manager	<input checked="" type="checkbox"/>	Manager
Edit	User Integration	Integ	integration@00dddm00000c4u4uai.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00ddm00000c4u4uai.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

9. Create an Approval Process for Property Object

Approval Processes

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

- 1 Read the help topic
- 2 View the checklist
- 3 Create a custom user hierarchical relationship field
- 4 Create a custom template
- 5 Create an approval process using either the Jump Start or Standard Wizard
- 6 Add Approval History Related List to all page layouts
- 7 Activate the process to deploy to your users

Manage Approval Processes For: [Property](#)

A listing of both active and inactive approval processes for Property is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

[Create New Approval Process](#)

Active Approval Processes
No approval processes available

Inactive Approval Processes
No approval processes available

The screenshot shows the 'Approval Processes' setup page in Salesforce. The left sidebar is titled 'Process Automation' and includes 'Approval Processes' under the 'Automation Home (Beta)' section. The main content area is titled 'Property' and shows 'Step 1. Enter Name and Description'. It contains fields for 'Process Name' (Property Approval) and 'Unique Name' (Property_Approval). A note indicates that Unique Name is required information. There is also a 'Description' field and a large text area below it. Navigation buttons 'Next' and 'Cancel' are at the bottom right.

The screenshot shows the 'Approval Processes' setup page in Salesforce, specifically Step 3. The left sidebar is identical to the previous screenshot. The main content area is titled 'Property' and shows 'Step 3. Specify Approver Field and Record Editability Properties'. It includes a note about assigning approval requests to different users and selecting a field for automatic routing. Under 'Select Field Used for Automated Approval Routing', 'Next Automated Approver Determined By' is set to 'Manager'. Under 'Record Editability Properties', there are two radio button options: 'Administrators ONLY can edit records during the approval process.' (selected) and 'Administrators OR the currently assigned approver can edit records during the approval process.' Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

Screenshot of the Salesforce Setup interface showing the "Approval Processes" wizard. Step 5: Select Fields to Display on Approval Page Layout.

The "Available Fields" list includes: Created By, Last Modified By, Verified, Property Owner, Location, Property Name, and Type. The "Selected Fields" list contains: Property Owner, Location, Property Name, and Type. A preview window shows the approval page layout with these fields.

Approval Page Fields: Display approval history information in addition to the fields selected above.

Security Settings: None

Screenshot of the Salesforce Setup interface showing the "Approval Processes" wizard. Step 6: Initial Submitters.

The "Initial Submitters" section allows specifying which users are allowed to submit initial requests. It includes a search bar for "Submitter Type" and "Role".

The "Available Submitters" list includes: Role: CEO, Role: COO, Role: CDO, 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: Education & Repair Services, Role: Marketing Team, Role: SVP Customer Service & Support, and Role: SVP Human Resources.

The "Allowed Submitters" list includes: Property Owner and 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.

The screenshot shows the Salesforce Setup interface for Approval Processes. The left sidebar is titled "Process Automation" and includes sections for 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, and Workflow Rules. A search bar at the top says "Search Setup". The main content area is titled "Approval Processes" and contains a section "What Would You Like To Do Now?". It asks if the user wants to create an approval step now or review what they've just created later. The "Yes, I'd like to create an approval step now" option is selected. A "Go!" button is at the bottom of this section.

The screenshot shows the "New Approval Step" configuration page. The left sidebar is identical to the previous screenshot. The main content area is titled "Step 1. Enter Name and Description" and indicates "Step 1 of 3". It has a "Next" and "Cancel" button. The "Enter Name and Description" section contains fields for Approval Process Name (Property Approval), Name (Executive Approval), Unique Name (Executive_Approval), Description (empty), and Step Number (1). A note at the bottom right says "Required information".

Screenshot of the Salesforce Setup interface showing the "Approval Processes" page. The left sidebar is titled "Process Automation" and includes "Approval Processes". The main content area is titled "New Approval Step" and is on "Step 2 of 3". It asks to "Specify Step Criteria" with the option "All records should enter this step". There are "Previous", "Next", and "Cancel" buttons at the bottom.

Screenshot of the Salesforce Setup interface showing the "Approval Processes" page. The left sidebar is titled "Process Automation" and includes "Approval Processes". The main content area is titled "New Approval Step" and is on "Step 3 of 3". It asks to "Select Assigned Approver" with the option "Automatically assign using the user field selected earlier (Manager)". It shows two users selected: "User" and "Customer". There are "Previous", "Save", and "Cancel" buttons at the bottom.

Screenshot of the Salesforce Setup interface showing the "Approval Processes" configuration page.

New Approval Step

Step 3. Select Assigned Approver

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.

Help for this Page

Step 3 of 3

Previous Save Cancel

Screenshot of the Salesforce Setup interface showing the "Property: Property Approval" process detail page.

Approval Processes

Property: Property Approval

Process Definition Detail

Process Name	Description	Active
Property_Approval	(Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS False)	<input type="checkbox"/>
Record Editability	Administrator OR Current Approver	<input type="checkbox"/>
Approval Assignment Email Template	Initial Submitters	Allow Submitters to Recall Approval Requests
	Property Owner, Sales Manager	<input type="checkbox"/>
	Created By: Rohan Ekbole, 29/10/2024, 6:39 pm	Modified By: Rohan Ekbole, 29/10/2024, 6:45 pm

Initial Submission Actions

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 Del	1	Executive Approval			User Executive	Final Rejection

Final Approval Actions

Action Type	Description
Edit Record Lock	Lock the record from being edited

Screenshot of the Salesforce Object Manager setup page for creating a custom field named "Verified".

Object Manager

Step 2. Enter the details

Field Label: Verified

Default Value: Unchecked

Field Name: Verified

Description:

Help Text:

OneDrive Screenshot saved: The screenshot was added to your OneDrive.

Screenshot of the Approval Processes setup page for creating a new approval process named "Property Approval".

Approval Processes

Step 2. Specify Entry Criteria

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
Property: Verified	equals	False
-None-	-None-	
-None-	-None-	
-None-	-None-	

AND
AND
AND

Add Filter Logic

Screenshot of the Salesforce Setup interface showing the 'Field Updates' page for editing a 'Verified Property' field update.

The 'Field Update Edit' form shows:

- Identification:** Name: Verified Property, Unique Name: Verified_Property, Object: Property, Field to Update: Verified, Field Data Type: Checkbox.
- Specify New Field Value:** Checkbox Options: True (radio button selected).

Buttons at the bottom: Save, Save & New, Cancel.

Screenshot of the Salesforce Setup interface showing the 'Field Updates' page for editing a 'UnVerified Property' field update.

The 'Field Update Edit' form shows:

- Identification:** Name: UnVerified Property, Unique Name: UnVerified_Property, Object: Property, Field to Update: Verified, Field Data Type: Checkbox.
- Specify New Field Value:** Checkbox Options: False (radio button selected).

Buttons at the bottom: Save, Save & New, Cancel.

The screenshot shows the Salesforce Setup interface for Approval Processes. A search bar at the top right contains the query "Search Setup". The left sidebar has sections for Data, Mass Transfer Approval Requests, Process Automation, and Approval Processes, with "Approval Processes" currently selected. The main content area displays the "Property: Property Approval" process. The "Process Definition Detail" section includes fields for Process Name (Property Approval), Unique Name (Property_Approval), Description, Entry Criteria (Property: Location NOT EQUAL TO blank AND (Property: Created By EQUALS False)), Record Editability (Administrator OR Current Approver), Approval Assignment Email Template, Initial Submitters (Property Owner, Role_Sales_Manager), and Created By (Rohan_Ekbole, 29/10/2024, 6:39 pm). The "Active" checkbox is checked. The "Next Automated Approver Determined By" field is set to "Manager of Record Submitter". The "Allow Submitters to Recall Approval Requests" checkbox is unchecked. The "Help for this Page" link is visible in the top right. Below this are sections for "Initial Submission Actions", "Approval Steps", and "Final Approval Actions", each with their respective configuration details.

This screenshot shows the same Approval Processes page after changes have been made. The "Active" checkbox in the "Process Definition Detail" section is now unchecked. All other fields and configurations remain identical to the first screenshot. The "Help for this Page" link is also present.

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

The screenshot shows the Salesforce Flow Builder interface with two main sections:

Flow Builder - Property Approval - V1 (Top Bar)

Record-Triggered Flow Start (Flow Diagram)

```
graph TD; Start((Record-Triggered Flow Start)) --> RunImmediately((Run Immediately)); RunImmediately --> ApprovalAction[Approval for property Action]; ApprovalAction --> End((End))
```

Submit for Approval (Action Definition)

- Label:** Approval for property
- API Name:** Approval_for_property
- Description:** (Empty)
- Submit for Approval** (Action Type): submit-submit

Set Input Values for the Selected Action

- Record ID:** Aa Triggering Property_c > Record ID (Input field)
- Approval Process Name Or ID:** (Switch): Not Included
- Next Approver IDs:** (Switch): Not Included

Select Type (Modal Dialog)

Recommended

- Screen Flow**: Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
- Record-Triggered Flow**: (Selected) Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
- Schedule-Triggered Flow**: Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
- Platform Event—Triggered Flow**: Launches when a platform event message is received. This autolaunched flow runs in the background.
- Autolaunched Flow (No Trigger)**: Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
- Record-Triggered Orchestration**: Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

All Flow Types

- Autolaunched Flow (No Trigger)**: Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
- Autolaunched Orchestration (No Trigger)**: Launches when invoked by Apex, REST API, and more.

Buttons

- Back
- Create

Flow Builder

https://smartinternz-9a-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app

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

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:

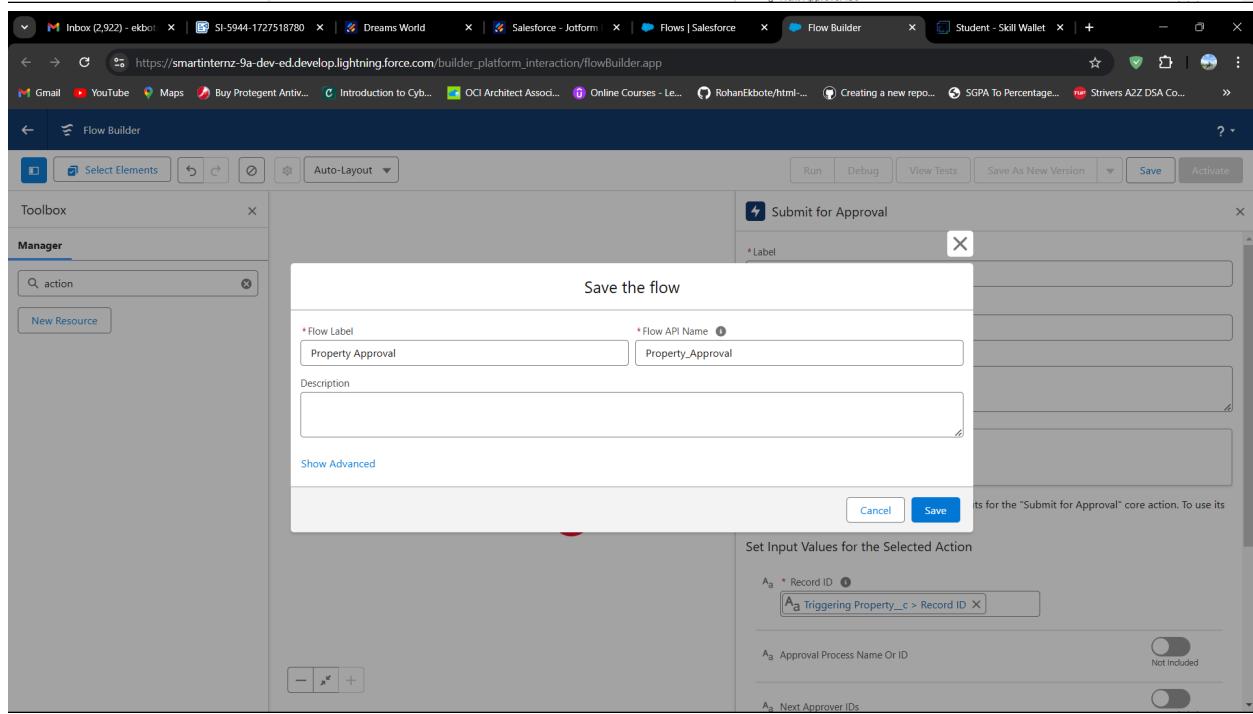
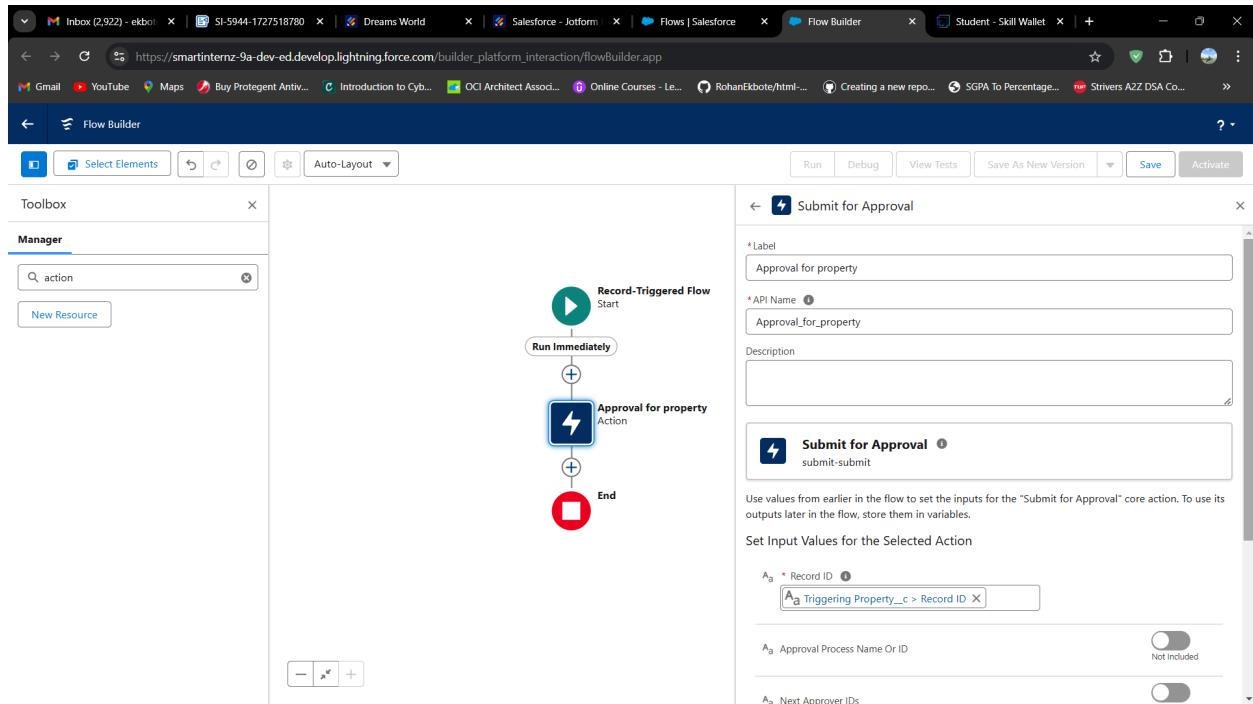
Action

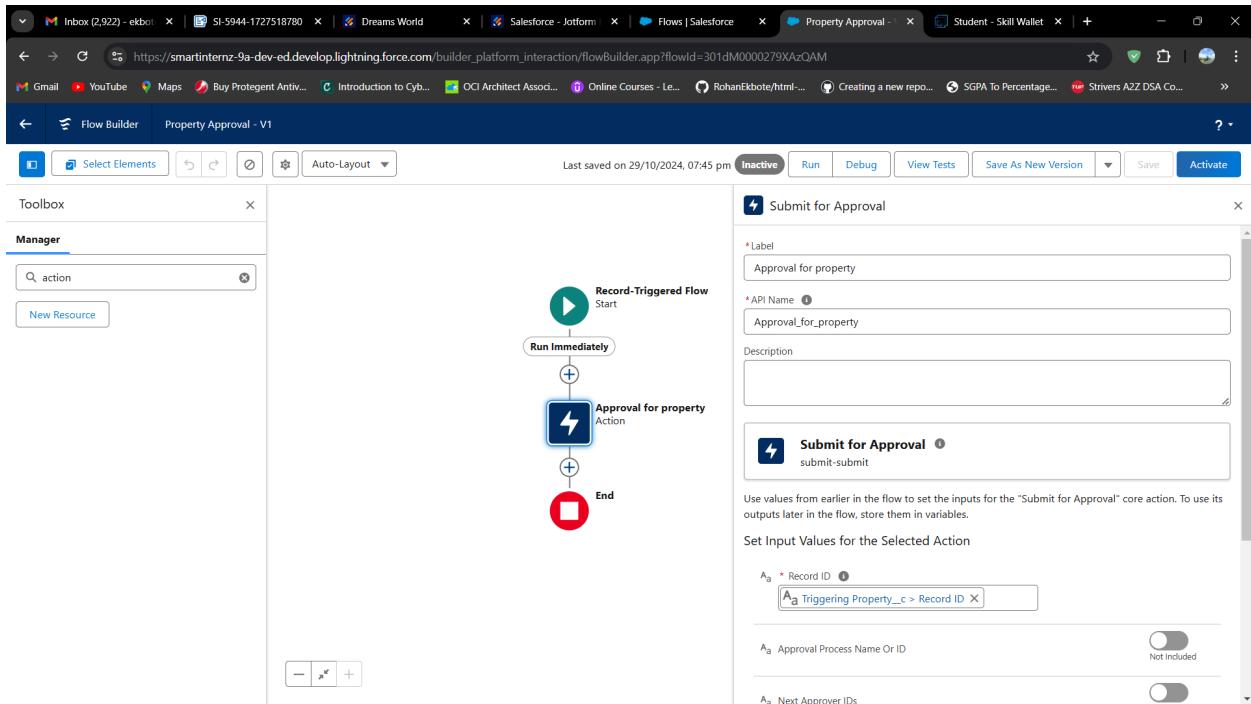
Search Actions: Q submit

Actions

Submit for Approval submit-submit

Create HTTP Callout





11. Create an App Page

Screenshot of the Salesforce Lightning App Builder setup page:

The URL is <https://smartinternz-9a-dev-ed.lightning.force.com/lightning/setup/FlexiPageList/home>

The page title is "Lightning App Builder".

The left sidebar shows the "Setup" tab selected, along with "Home" and "Object Manager".

The main content area displays the "Lightning Pages" list.

Table headers for the list:

Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
-------	------	------------------	-------------	------	------------	------------------

A message at the top states: "The Lightning App Builder provides an easy to use graphical interface for creating custom Lightning pages for Salesforce Lightning Experience and mobile app. Lightning pages are built using Lightning components—compact, configurable, and reusable elements that you can drag and drop into regions of the page in the Lightning App Builder."

View options: All | Create New View

Links at the bottom: A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Screenshot of the "Create a new Lightning page" wizard:

The URL is https://smartinternz-9a-dev-ed.lightning.force.com/visualEditor/appBuilder.app?retUrl=%2flightning%2fsetup%2fFlexiPageList%2fpage%3f%26address%3d%2f_u%2fflexipage%2...

The title is "Create a new Lightning page".

The left sidebar shows the "Pages" tab selected.

The main content area shows a preview of the "App Page" template.

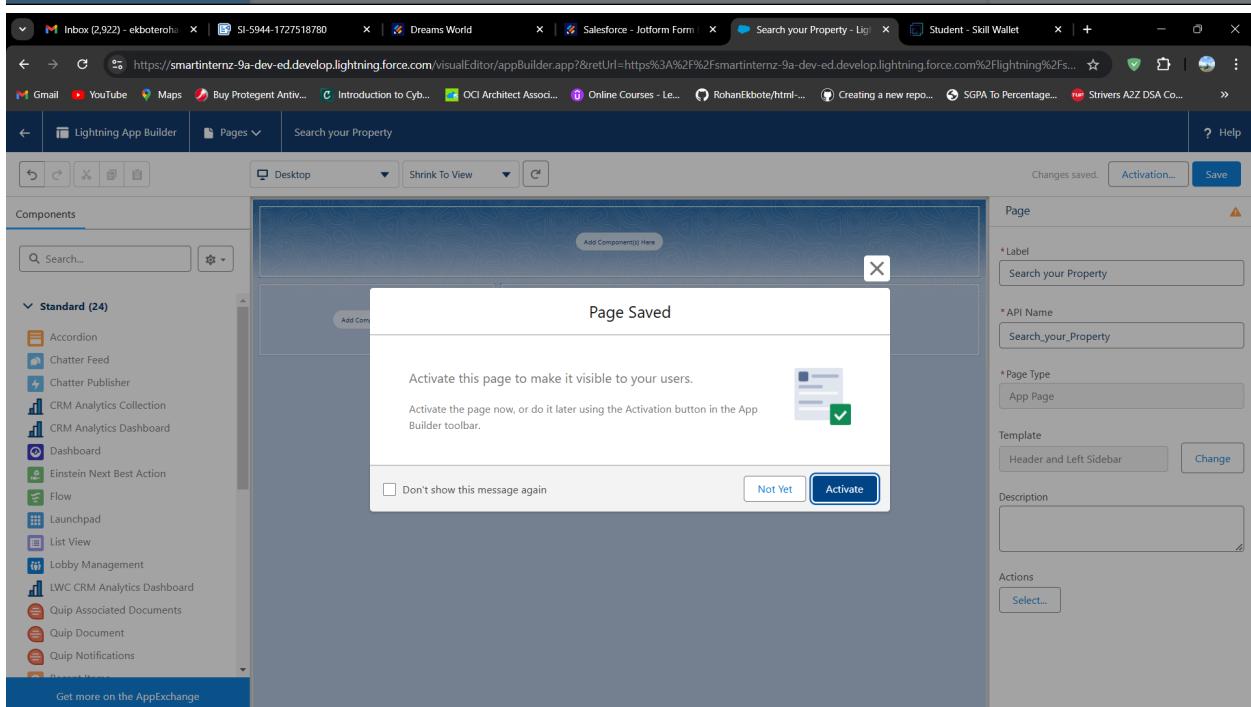
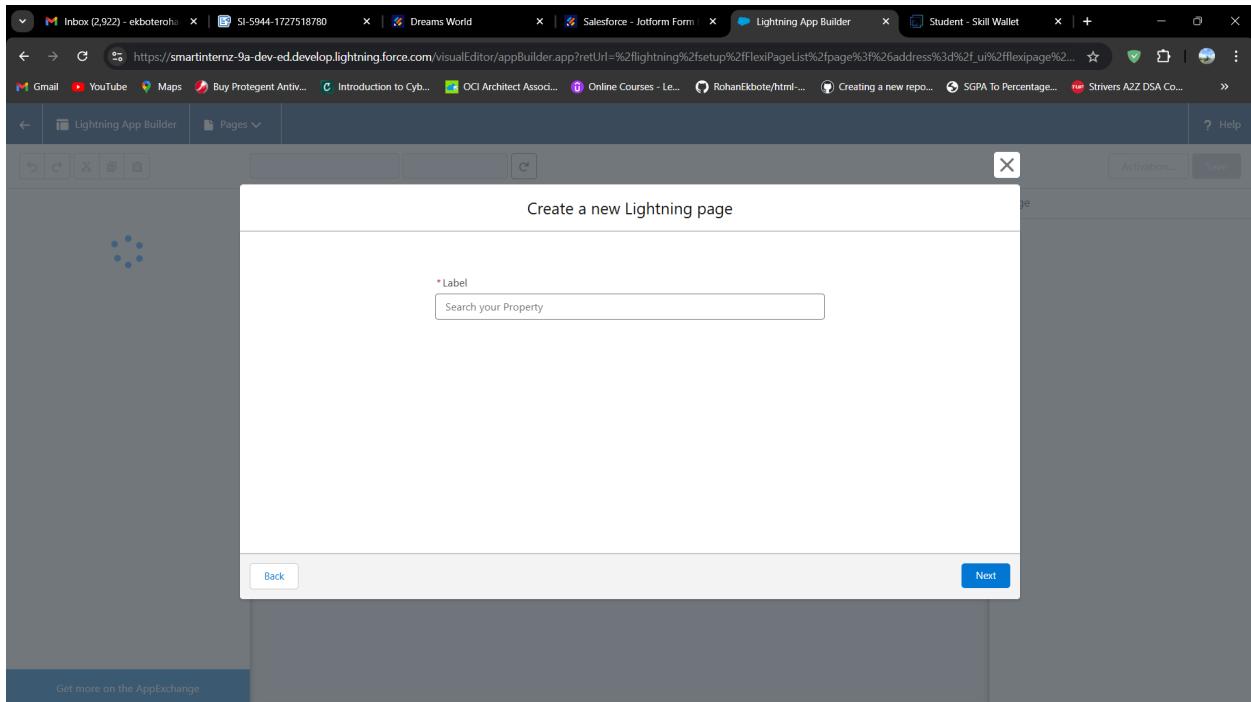
Preview description: "Build a one-page app for Lightning Experience and the mobile app."

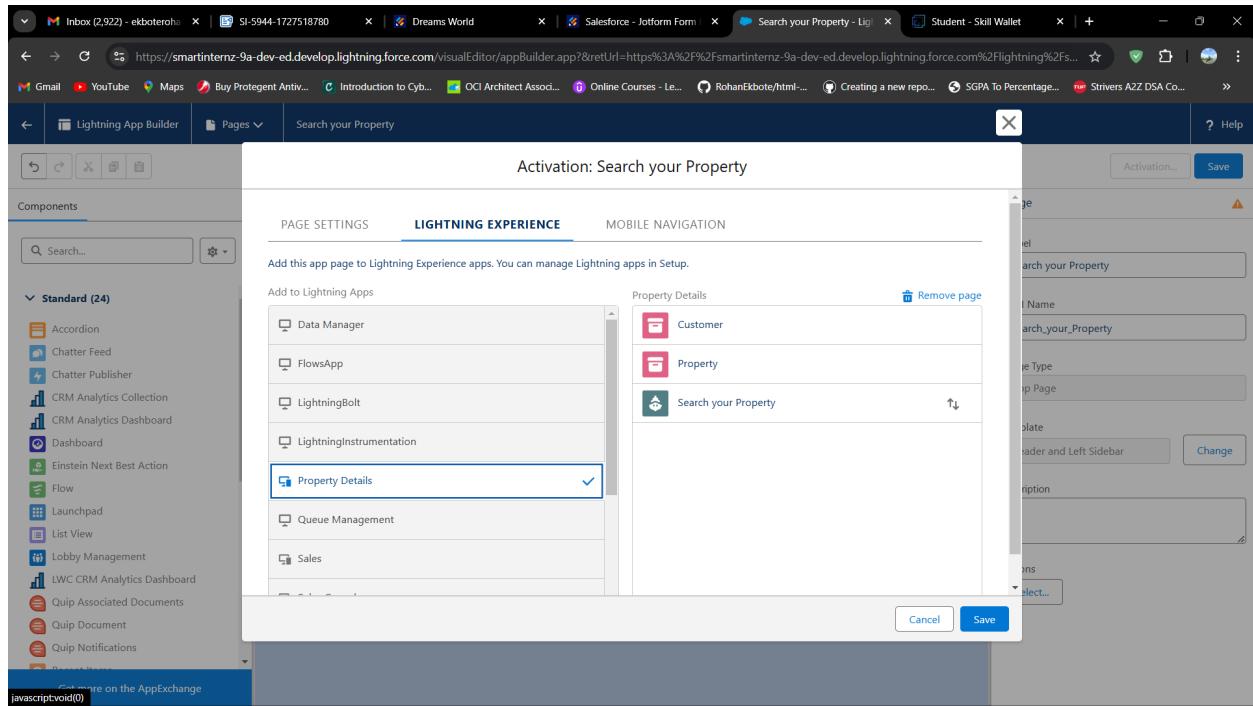
Preview image showing a mobile phone and a desktop screen displaying a dashboard with a pie chart labeled "1.8M".

Recent items (20) list:

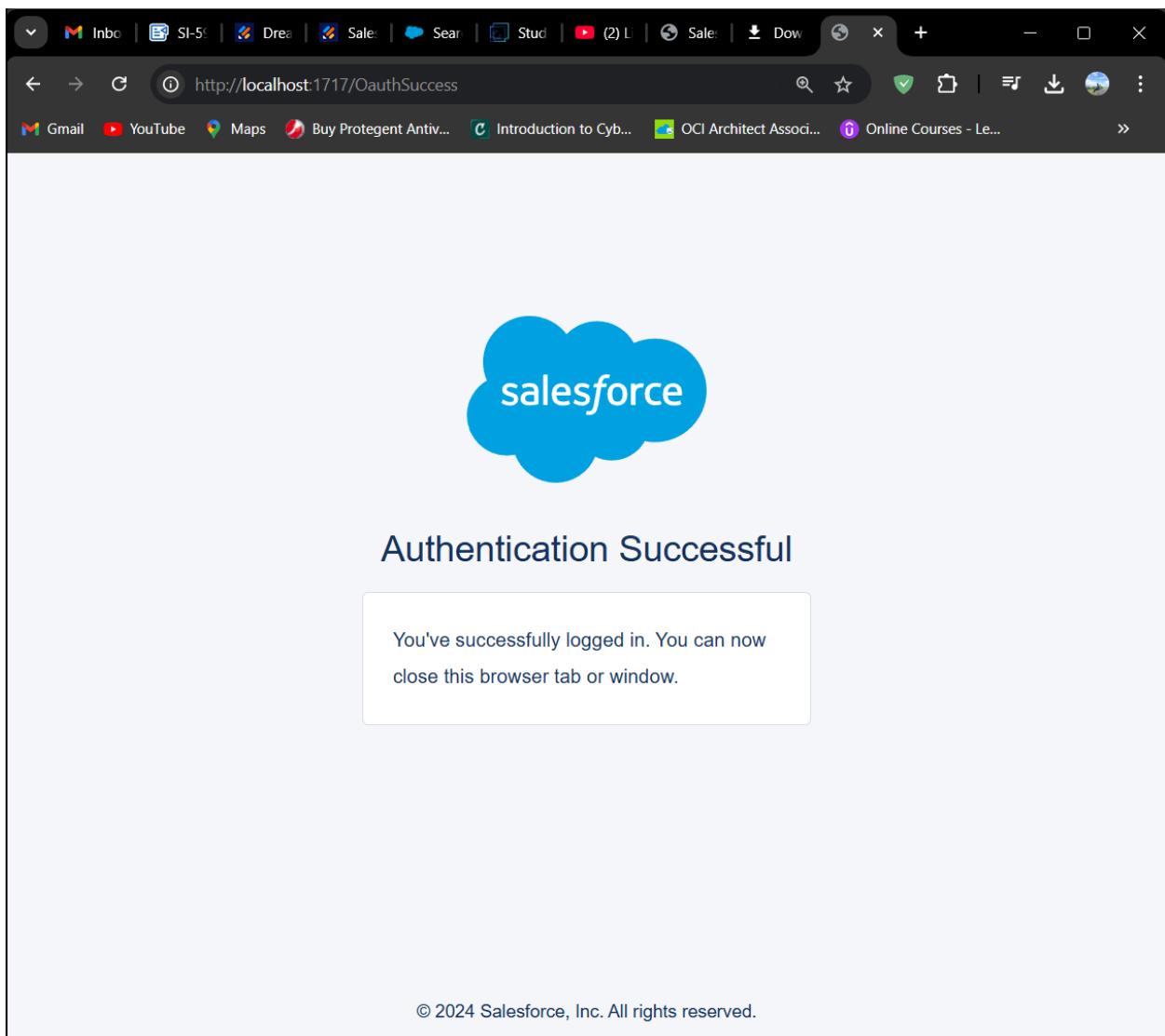
- Active Industries - Premium Support Package
- Account - Case - Direct
- Amount: \$125,000
- Owner: Jason Deller
- Active Industries - Type - Direct
- Phone: +123-555-1234
- Industry: Technology
- Owner: Jason Deller
- Active Industries - Support Request - Opportunity
- Opportunity - Active Industries - Premium Support

Buttons: Activation... | Save | Next





12. Create a LWC Component



Developer Console - Google Chrome
https://smartinternz-9a-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

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

```
1 public class PropertHandler_LWC{  
2     @AuraEnabled(cacheable=true)  
3     public static list<Property__c> getProperty(string type , boolean verified){  
4         return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM Property__c Where Type__c =: type AND Verified__c =: verified];  
5     }  
6 }  
7  
8  
9  
10  
11  
12 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User Application Operation Time Status Read Size

Filter Click here to filter the log list

Screenshot showing the development environment for a Lightning Web Component (LWC) in VS Code and a browser-based Salesforce OAuth consent screen.

VS Code Environment:

- File Explorer:** Shows project structure with folders like `PROPERTYFINDING`, `.vscode`, and `lwc`.
- Code Editor:** Displays `c_01_Property_Management.js` file content.
- Output Panel:** Shows errors related to Salesforce js-meta.xml IntelliSense and the local development server.

```
JS c_01_Property_Management.js
force- 1 + SFDX: Authorize an Org
        2 + SFDX: Authorize a Dev Hub
        3 + SFDX: Create a Default Scratch Org...
        4 + SFDX: Remove Deleted and Expired Orgs
        5 import { getRecord } from 'lightning/uiRecordApi';
        6
        7 import USER_ID from '@salesforce/user/Id';
        8
        9 export default class C_01_Property_Management extends LightningElement {
        10
        11     @api recordId
        12
        13     userId = USER_ID;
        14
        15     verifiedvar
        16
        17     typevar
        18
```

Browser Environment:

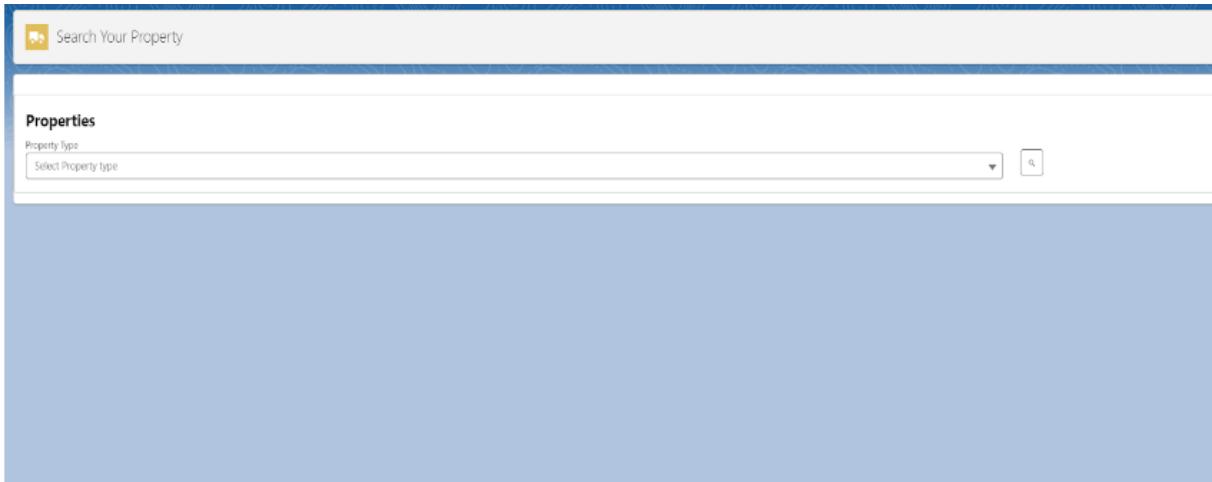
- Address Bar:** URL is `https://smartinternz-9a-dev-ed.develop.my.salesforce.com/_ui/identity/oauth/ui/A...`
- Content Area:** Displays an "Allow Access?" dialog from the Salesforce CLI.

The dialog content includes:

- 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?)`
- Buttons:** `Deny` and `Allow`
- Text at bottom:** 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

