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

BY

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Project Abstract

Dreams World Properties has strategically integrated Salesforce to enhance client management and streamline property-related services. This integration automates the capture of customer information and preferences from the company’s website, creating comprehensive profiles in Salesforce and reducing manual data entry errors. Customers are categorized into approved and non-approved segments, with approved users receiving personalized property recommendations tailored to their preferences, significantly enhancing their experience. Non-approved users still access a wide range of listings, ensuring suitability for all clients. This seamless integration optimizes operational efficiency by automating processes and freeing staff for strategic tasks, ultimately improving customer satisfaction and supporting growth in the competitive real estate market. Through Salesforce, Dreams World Properties offers superior customer service, personalized recommendations, and efficient management, establishing itself as a leader in the industry.

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INTRODUCTION

Dreams World Properties has harnessed the power of Salesforce to revolutionize its client management and property-related services. By integrating Salesforce with its website, the company has automated the capture and organization of customer information and preferences, creating detailed profiles without the need for manual data entry. This sophisticated system categorizes users into approved and non-approved segments, allowing for personalized property recommendations that enhance the user experience for approved clients while still providing a broad range of listings for others. This integration not only optimizes operational efficiency but also frees up staff to focus on strategic tasks, ultimately improving customer satisfaction and driving growth in the competitive real estate market.

In an era where personalized customer service and efficient data management are crucial, Dreams World Properties' innovative approach sets it apart from competitors. The automation facilitated by Salesforce ensures that no customer detail is overlooked, and every interaction is recorded and utilized to enhance service delivery. The categorization system means that approved users receive tailored property suggestions, making their search more efficient and enjoyable, while non-approved users still have access to comprehensive listings, ensuring no potential client is left out. This seamless integration showcases Dreams World Properties' commitment to leveraging advanced technology to provide top-tier real estate services, demonstrating their leadership and forward-thinking in an ever- evolving industry. Through this innovative use of Salesforce, Dreams World Properties underscores its dedication to superior customer service, operational excellence, and effective management, solidifying its position as a frontrunner in the real estate market.

Task 1: Create a JotForm and integrate it with the org to create a record of customers automatically.

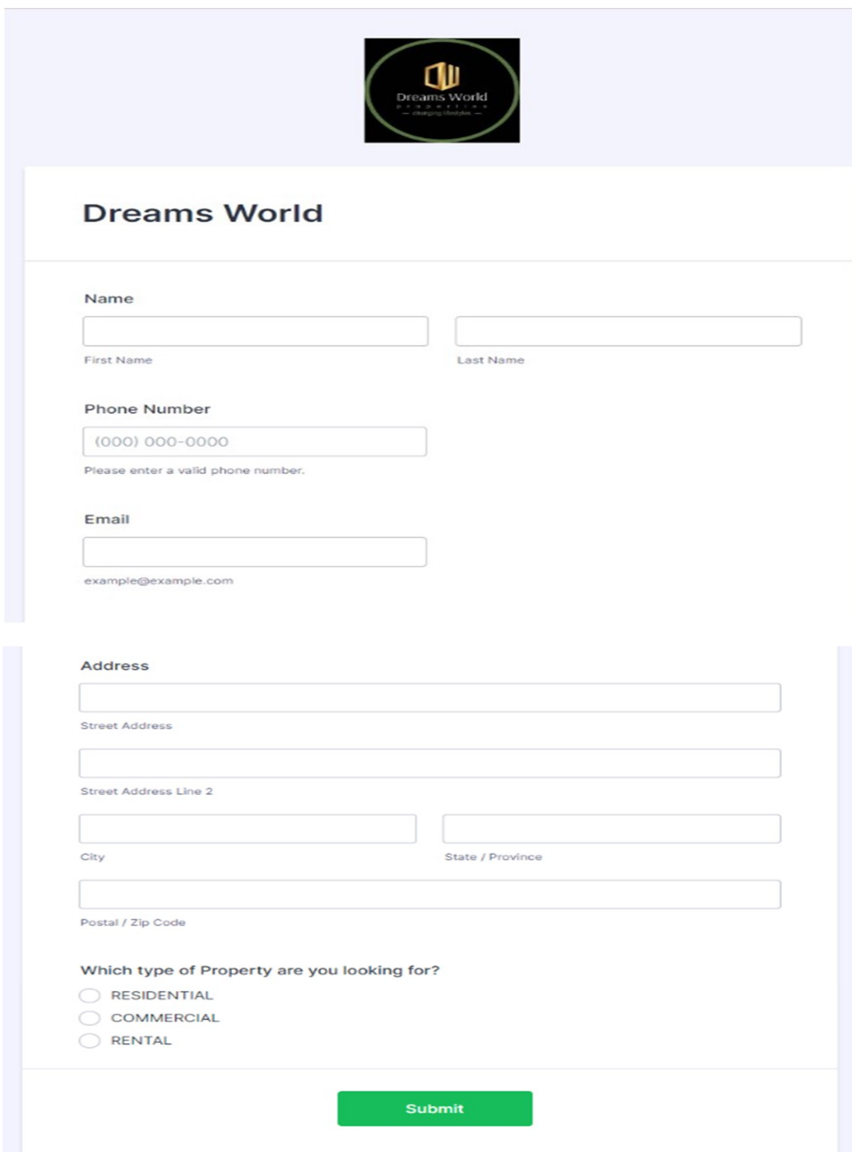
Client wants a form for the customers to get the details directly into the salesforce so that the admins can create a user in the org.

Activity 1

- Creating a form to get the customer details like Name, Phone, Email, Address and type of property the customer is interested in.

My form - https://form.jotform.com/242103954717052

Output:



Dreams World

Name

First Name | Last Name

Phone Number

(000) 000-0000

Please enter a valid phone number.

Email

example@example.com

Address

Street Address

Street Address Line 2

City | State / Province

Postal / Zip Code

Which type of Property are you looking for?

- RESIDENTIAL
- COMMERCIAL
- RENTAL

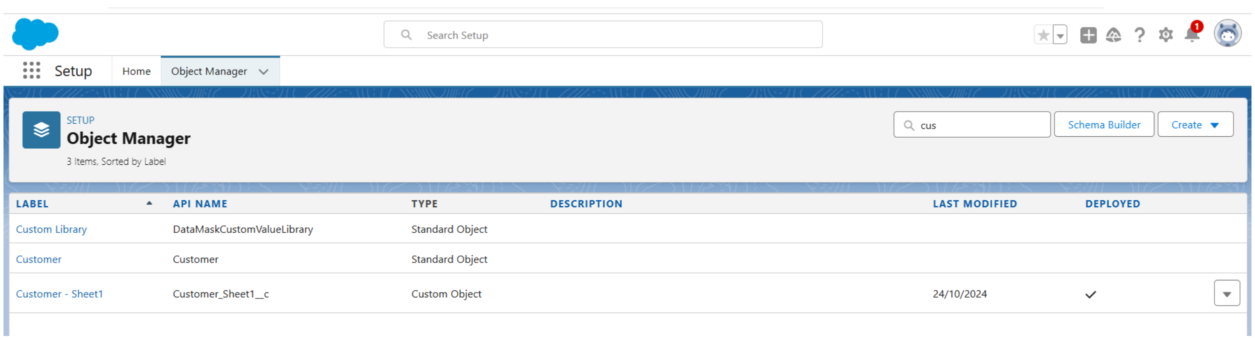
Submit

Task 2: Create Objects from Spreadsheet.

Directly Creating Objects from Spreadsheet in Salesforce

- Create Customer object

To create a Customer object, go to Object Manager, select "Create Object from Spreadsheet," click the provided link to download the Customer spreadsheet, upload the downloaded file, map the spreadsheet fields to the object's fields, and complete the upload to finish creating the Customer object.



- Create Property object

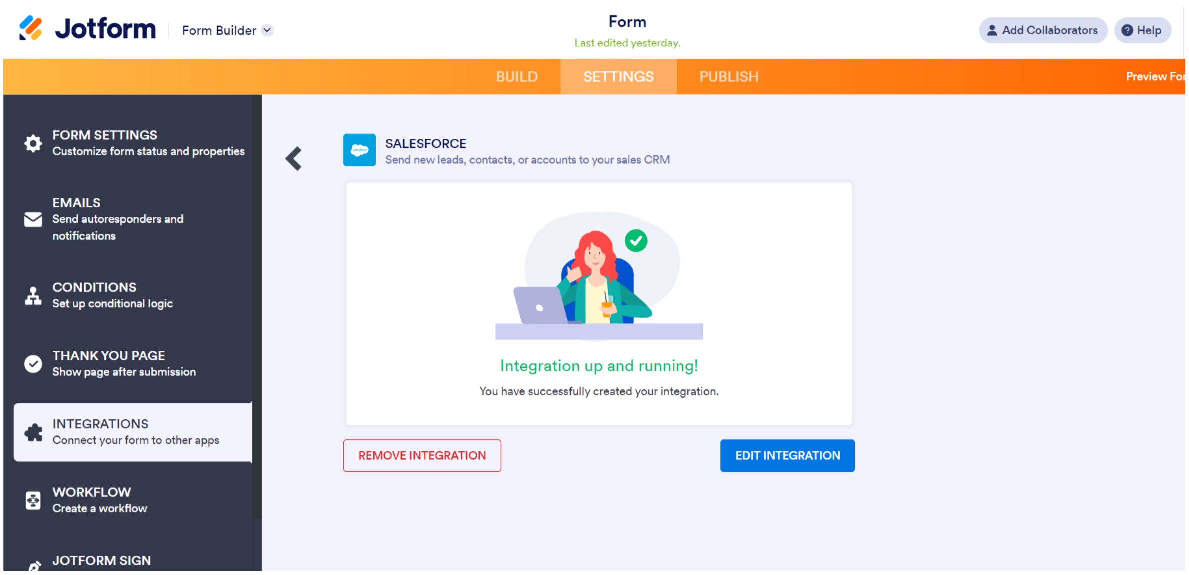
To create a Property object, go to Object Manager, select "Create Object from Spreadsheet," download the Property spreadsheet via the provided link, upload the file, map the fields from the spreadsheet to the object's fields, and finalize the upload to complete the creation of the Property object.

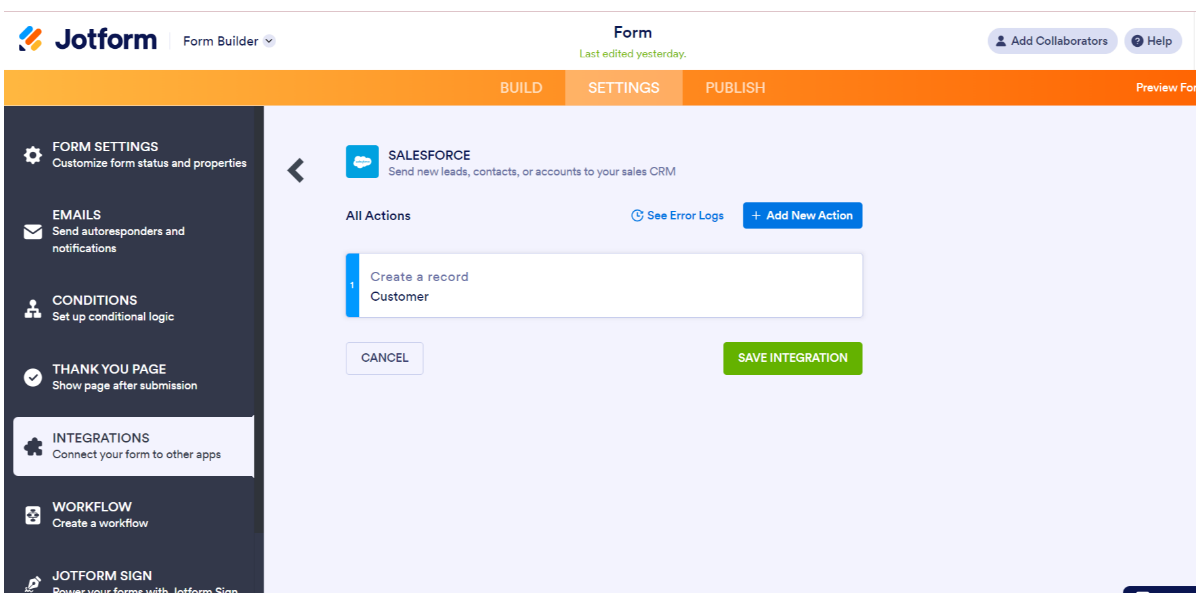
Task 3: Integrate JotForm with Salesforce Platform

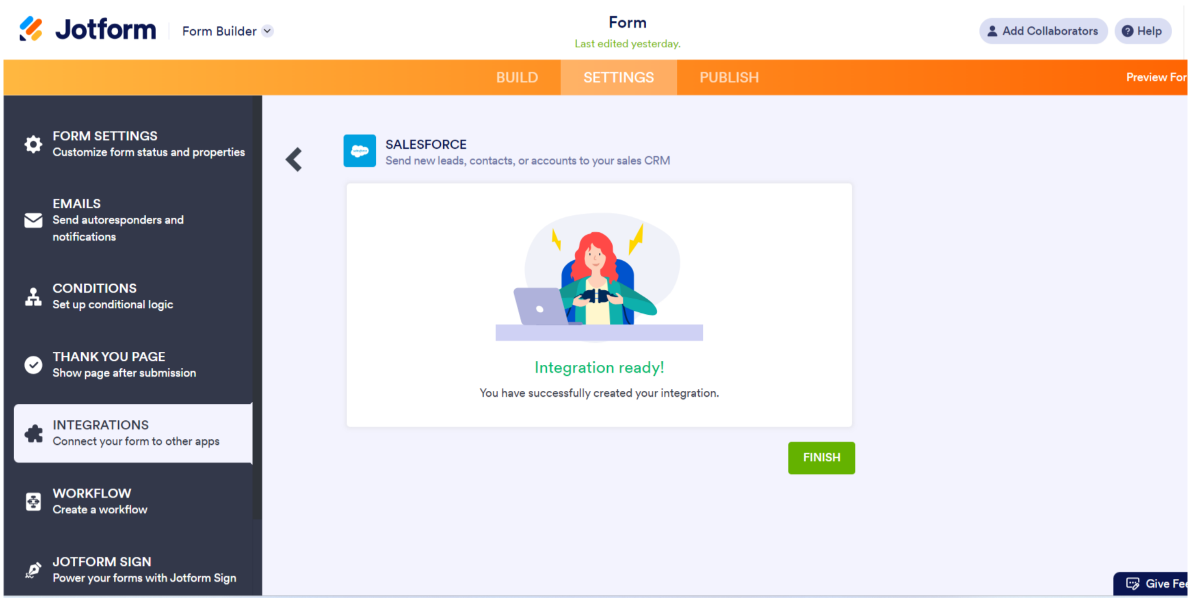
In this Milestone we are going to integrate jotform with Salesforce

Activity 1

- **Integ**rate Jotform with Salesforce to create Customer records.





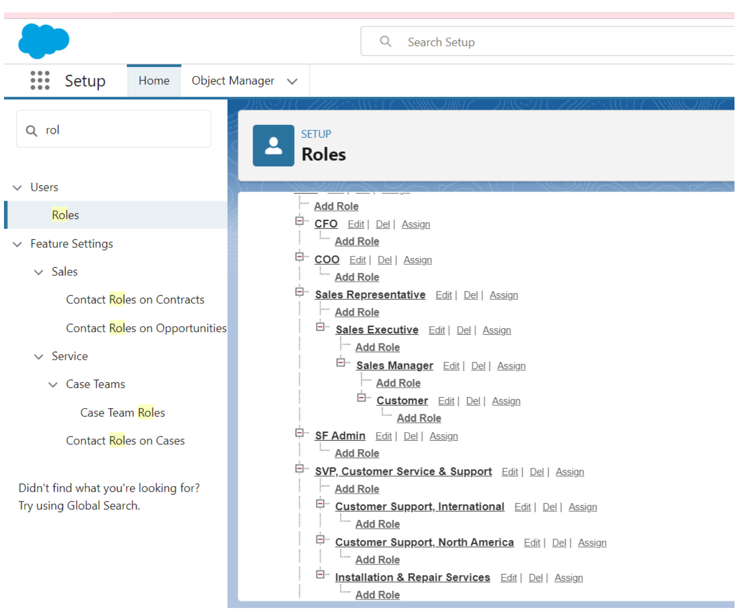


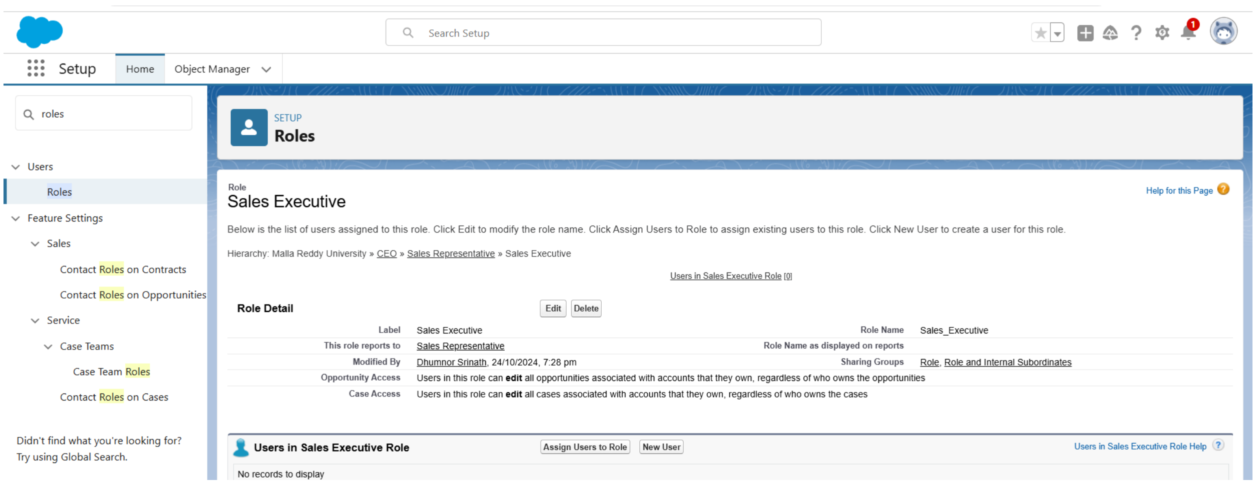
Task 4: Create Roles

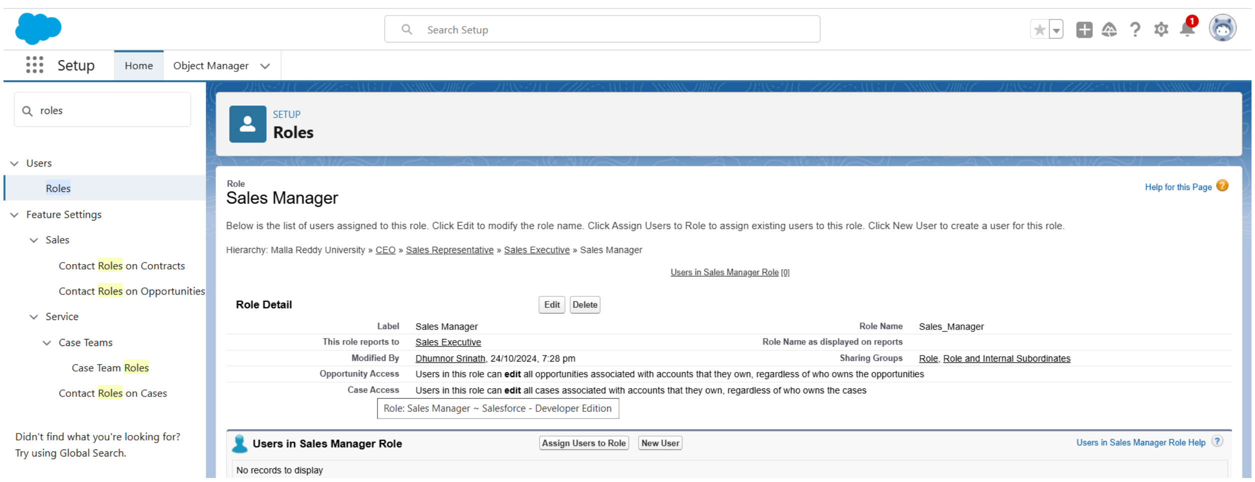
Create Roles as per business requirement

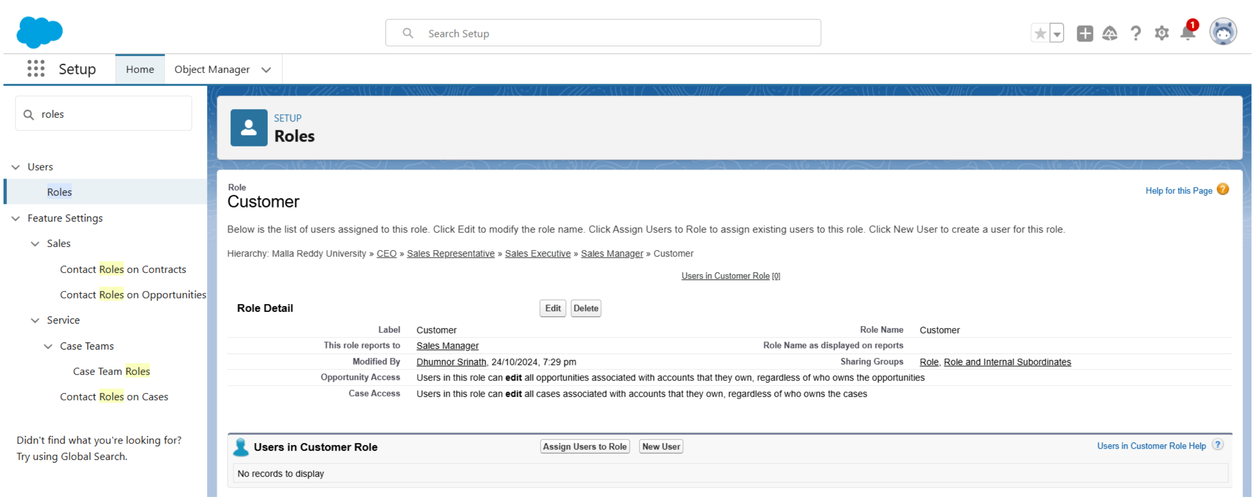
- Sales Executive Role

- Create a hierarchical role structure in Salesforce: Sales Executive below Sales Representative, Sales Manager below Sales Executive, and Customer below Sales Manager.




Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Role
Sales Executive
Help for this Page
Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.
Hierarchy: Malla Reddy University » CEO » Sales Representative » Sales Executive
Users in Sales Executive Role [0]
Role Detail
Edit
Delete
Label Sales Executive
Role Name Sales_Executive
This role reports to Sales Representative
Role Name as displayed on reports
Modified By Dhumnor Srinath, 24/10/2024, 7:28 pm
Sharing Groups Role, Role and Internal Subordinates
Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
Users in Sales Executive Role
Assign Users to Role
New User
Users in Sales Executive Role Help
No records to display


Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Role
Sales Manager
Help for this Page
Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.
Hierarchy: Malla Reddy University » CEO » Sales Representative » Sales Executive » Sales Manager
Users in Sales Manager Role [0]
Role Detail
Edit
Delete
Label Sales Manager
Role Name Sales_Manager
This role reports to Sales Executive
Role Name as displayed on reports
Modified By Dhumnor Srinath, 24/10/2024, 7:28 pm
Sharing Groups Role, Role and Internal Subordinates
Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
Role: Sales Manager ~ Salesforce - Developer Edition
Users in Sales Manager Role
Assign Users to Role
New User
Users in Sales Manager Role Help
No records to display

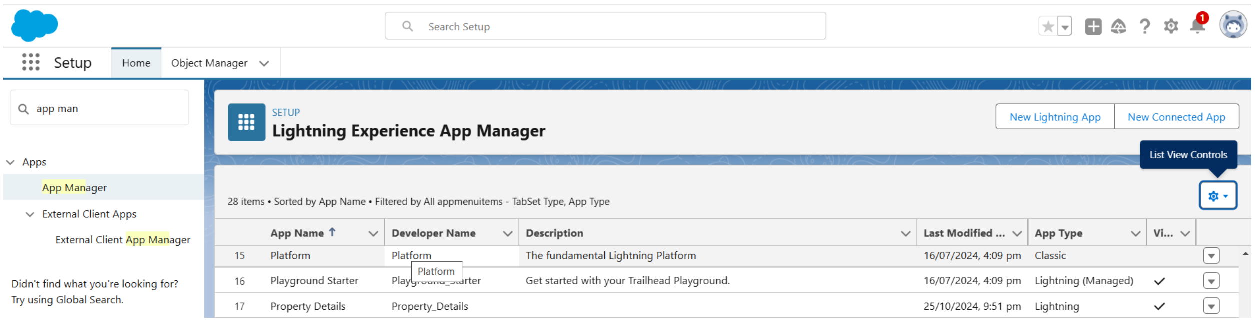

Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Role
Customer
Help for this Page
Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.
Hierarchy: Malla Reddy University » CEO » Sales Representative » Sales Executive » Sales Manager » Customer
Users in Customer Role [0]
Role Detail
Edit
Delete
Label Customer
Role Name Customer
This role reports to Sales Manager
Role Name as displayed on reports
Modified By Dhumnor Srinath, 24/10/2024, 7:29 pm
Sharing Groups Role, Role and Internal Subordinates
Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
Users in Customer Role
Assign Users to Role
New User
Users in Customer Role Help
No records to display

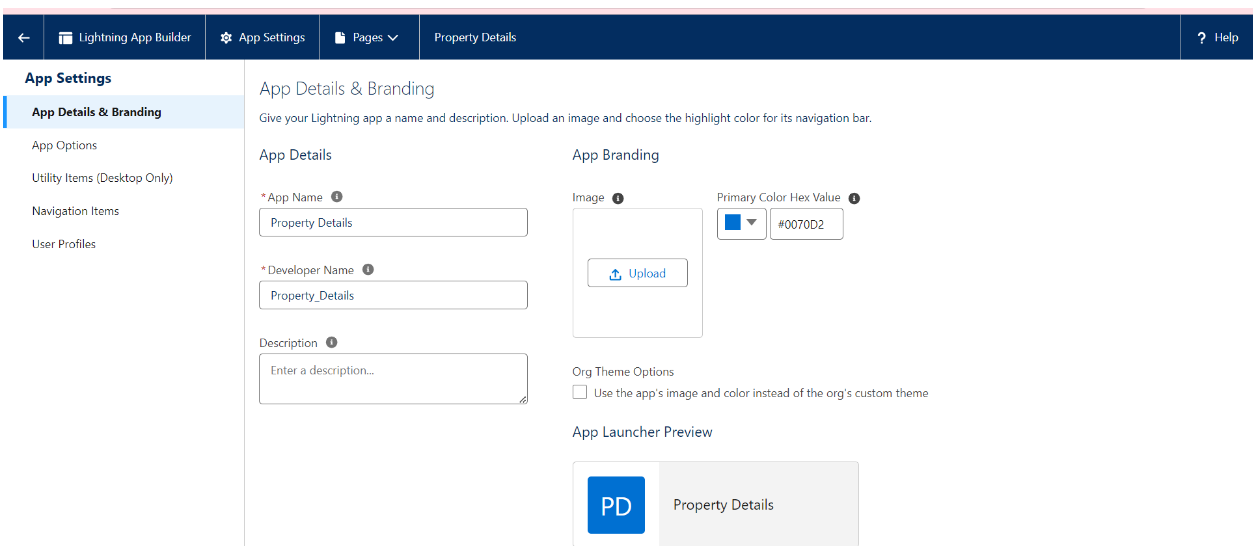
Task 5: Create a Property Details App

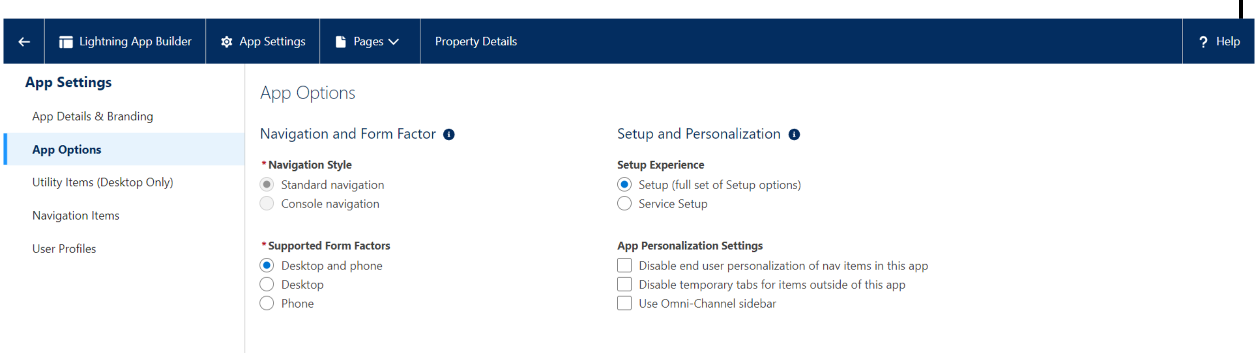
An App where the objects will be displayed

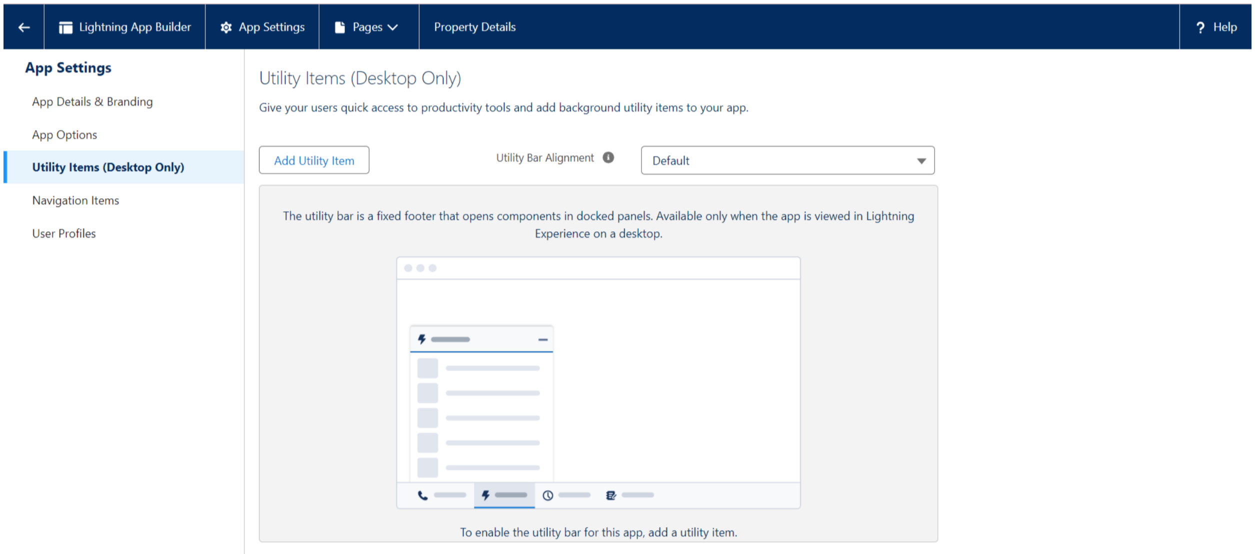
Activity 1

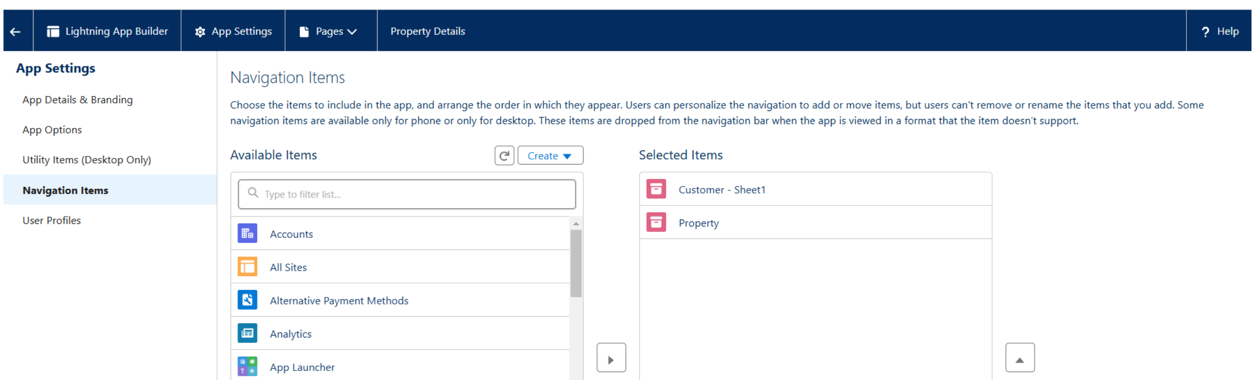
- Create a new Lightning App named “Property Details” and add “Customer” and “Property” objects, then assign it to the “System Admin” profile.

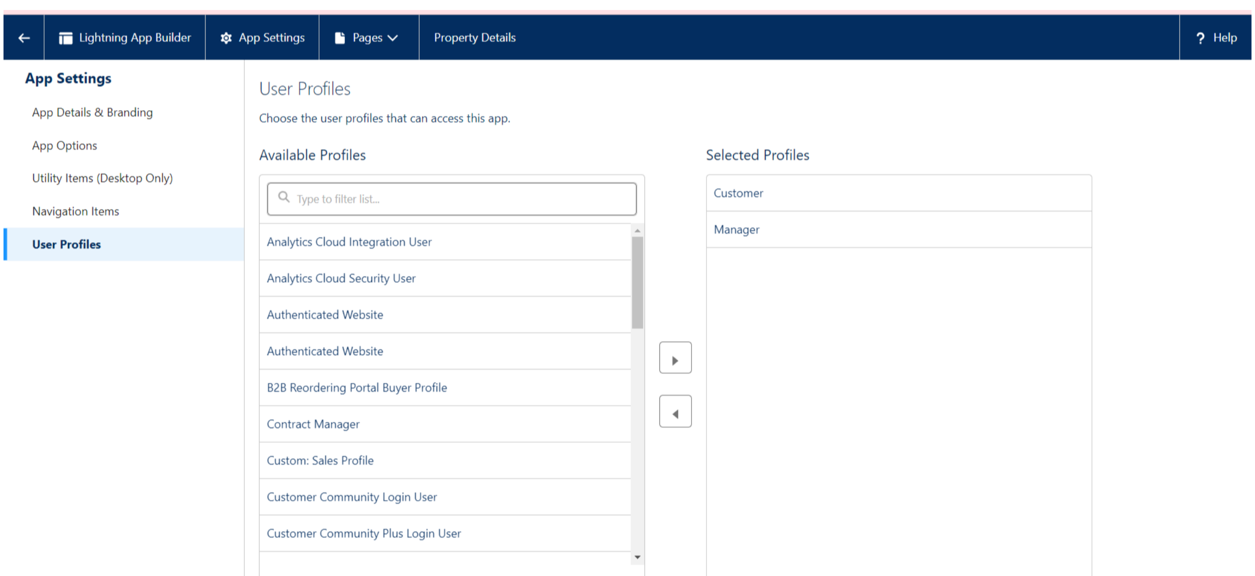







Lightning App Builder
App Settings
Pages
Property Details
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Utility Items (Desktop Only)
Give your users quick access to productivity tools and add background utility items to your app.
Add Utility Item
Utility Bar Alignment
Default
The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.
To enable the utility bar for this app, add a utility item.


Lightning App Builder
App Settings
Pages
Property Details
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you 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.
Available Items
Create
Type to filter list...
Accounts
All Sites
Alternative Payment Methods
Analytics
App Launcher
Selected Items
Customer - Sheet1
Property

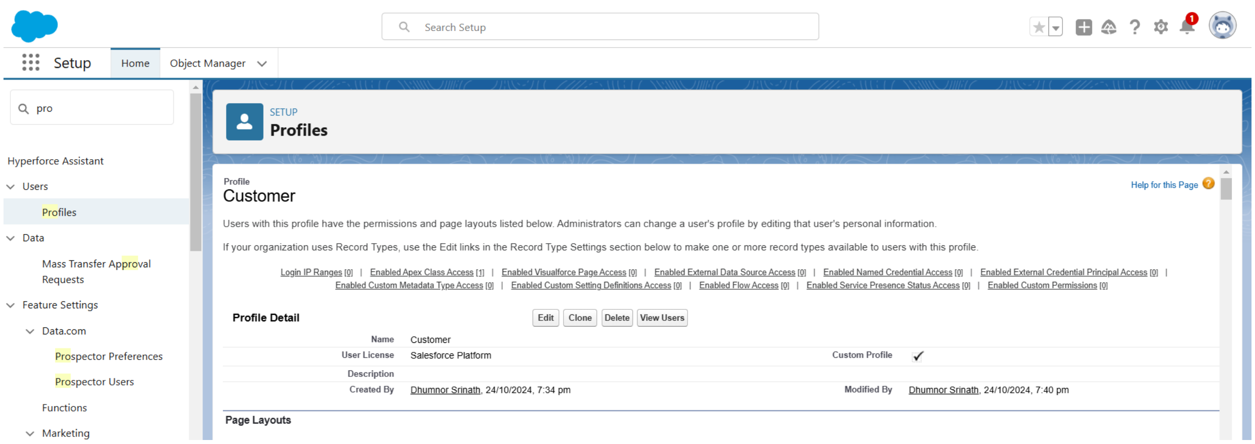

Lightning App Builder
App Settings
Pages
Property Details
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Custom: Sales Profile
Customer Community Login User
Customer Community Plus Login User
Selected Profiles
Customer
Manager

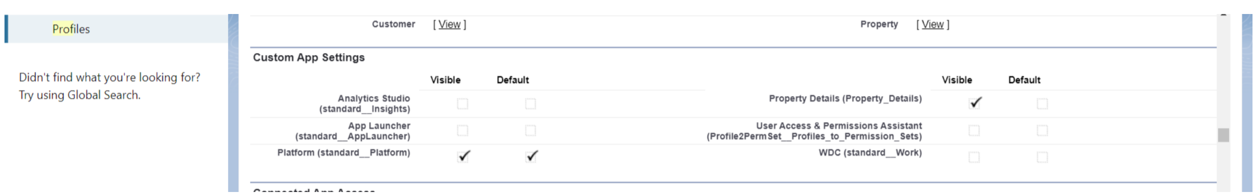
Task 6: Create Profiles

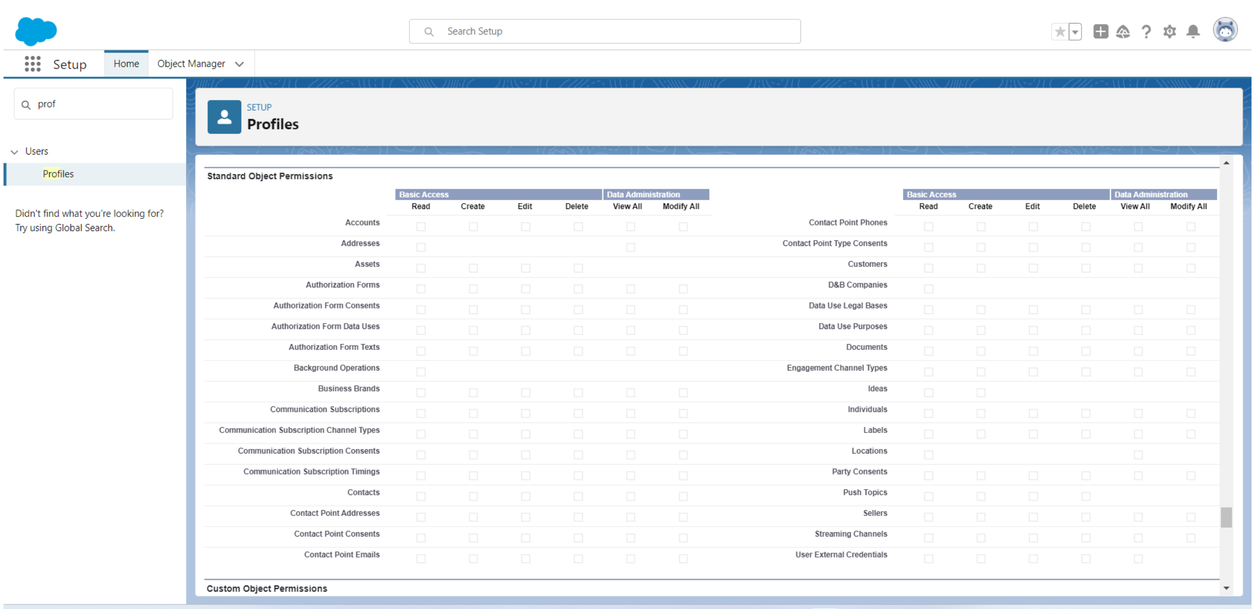
Create profiles as per business requirement

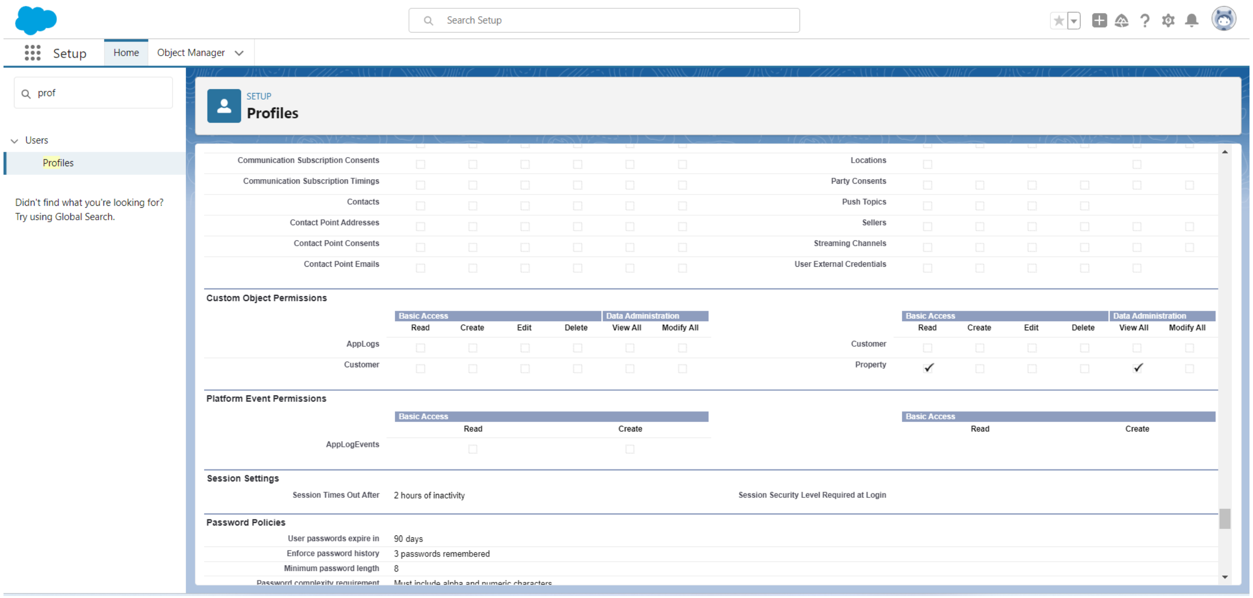
- Customer

- Clone the Salesforce Platform User profile, name it "Customer," adjust custom app settings to include only Property Details, remove all standard object permissions, and set read and view all permissions for the Property object.



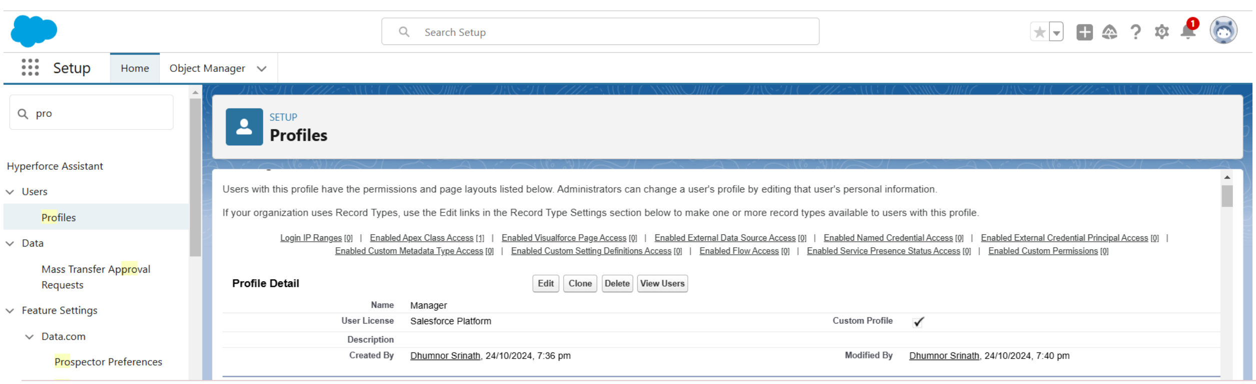


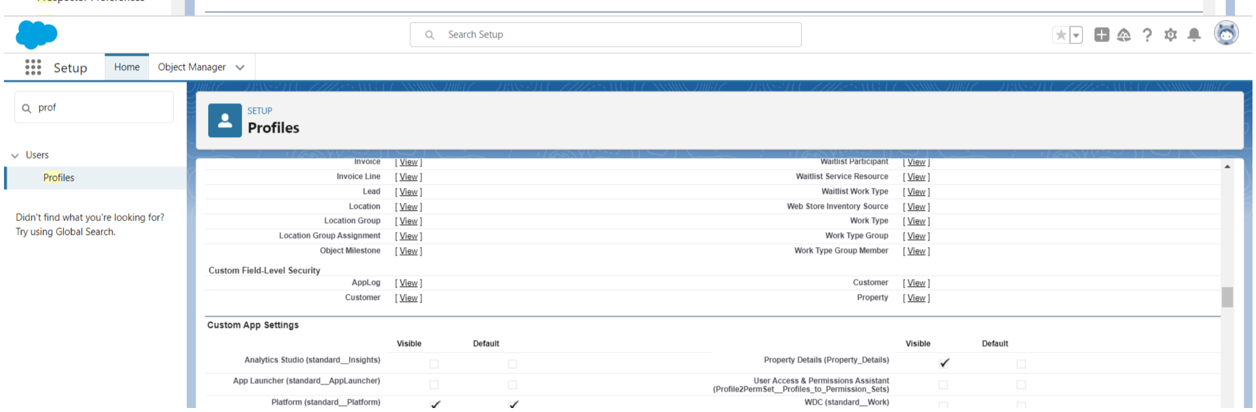


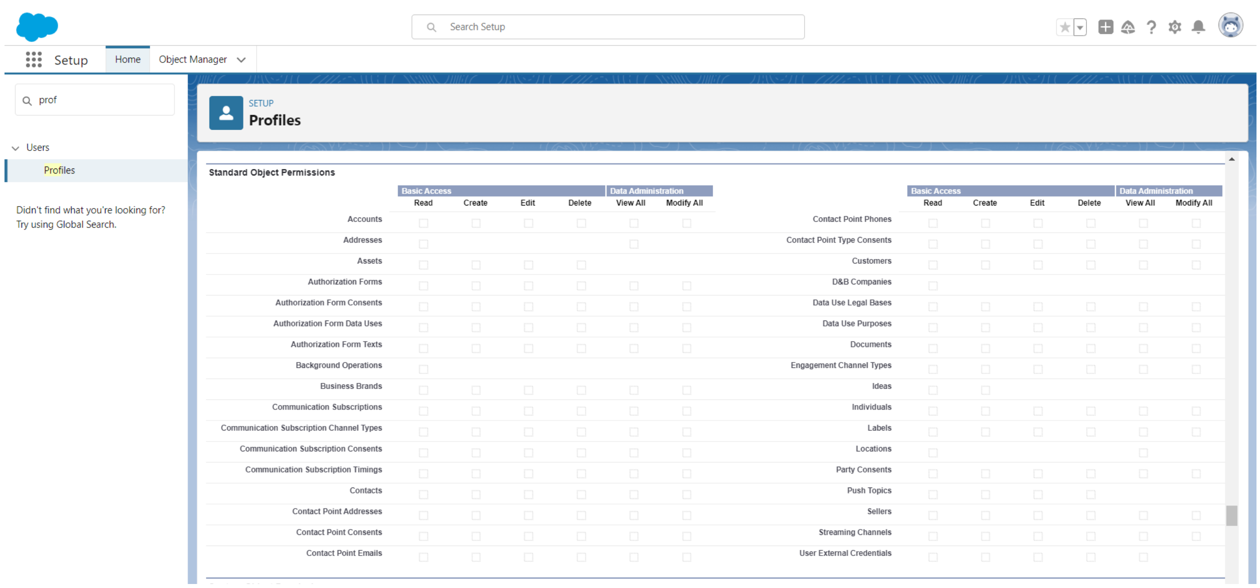


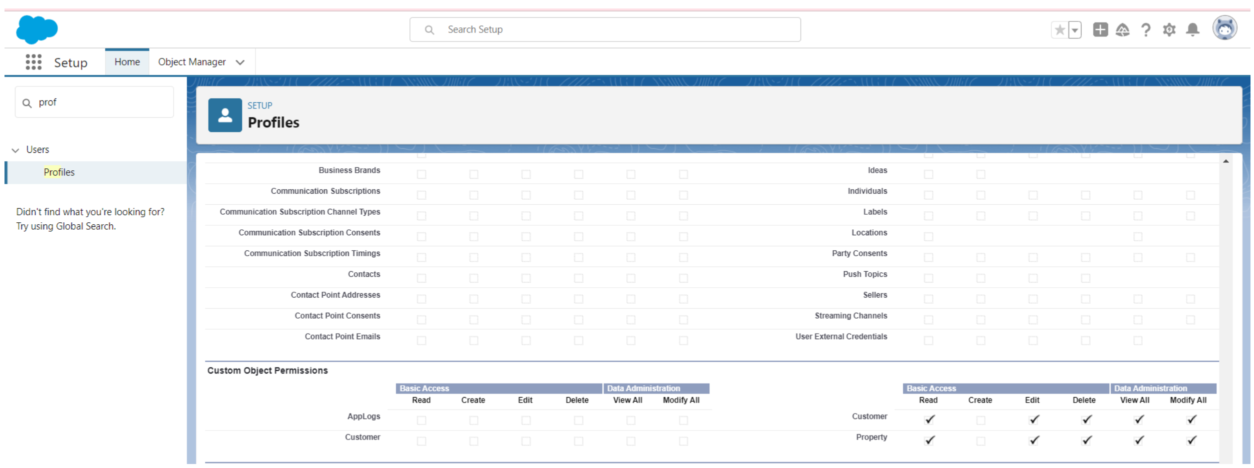
- Manager

- Clone the Salesforce Platform User profile, name it "Manager," then ensure only "Property Details" is checked in Custom App Settings, remove all StandardObject Permissions, uncheckall Custom Object Permissions, and enable "Modify All" for "Property" and "Customer."







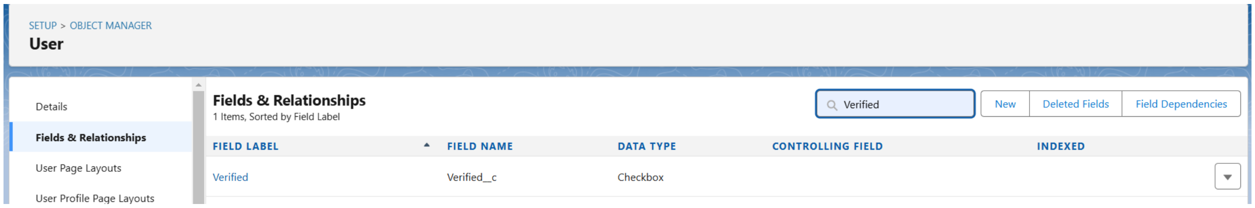


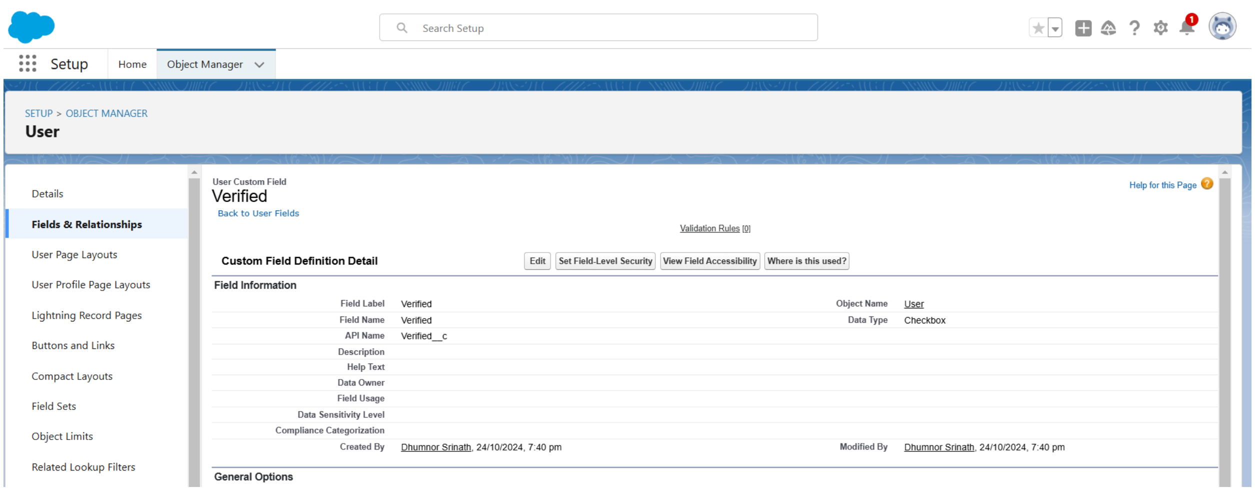
Task 7: Create aCheckBoxfield on user

Create Field on the User as per the business requirement.

Activity 1

In Object Manager, search for "User," go to Fieldsand Relationships, and create a new field named "Verified" with the data type "Check Box."



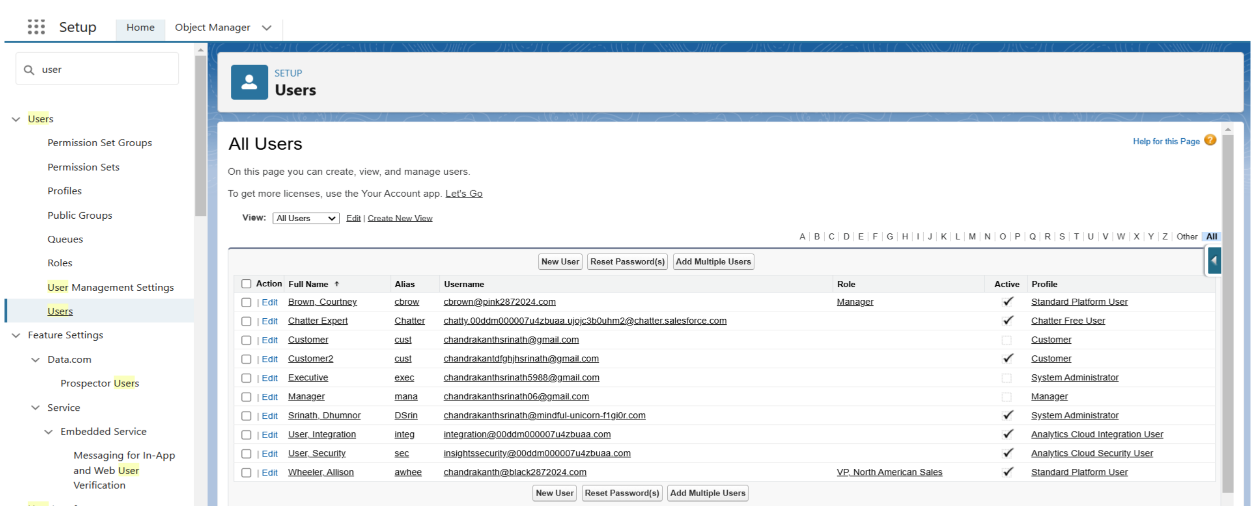


Task 8: Create Users

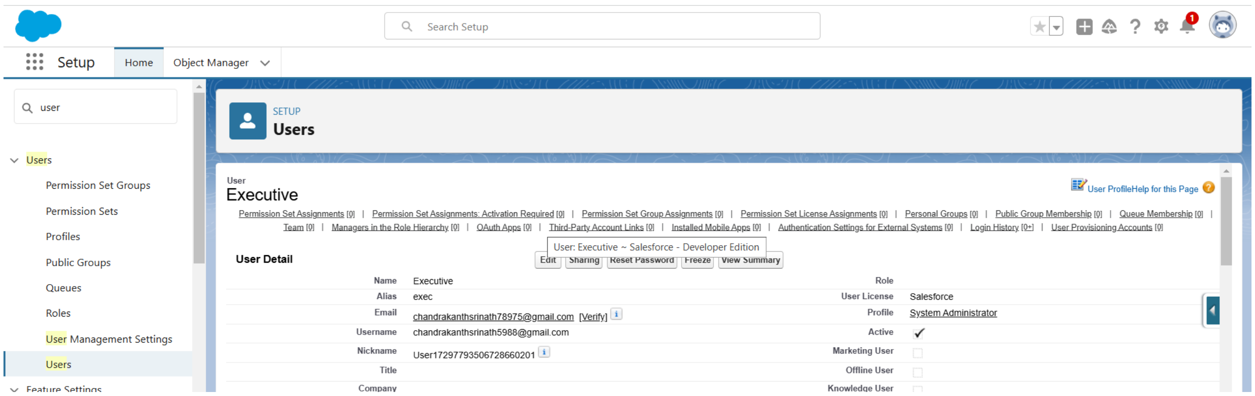
Create three different userswith three differentRoles and profilesas we have mentioned above.

- User 1

- In Setup, navigate to Administration > Users > New User, fill in the Last Name as "Executive," set the Role to "Sales Executive," select the License as "Salesforce,"

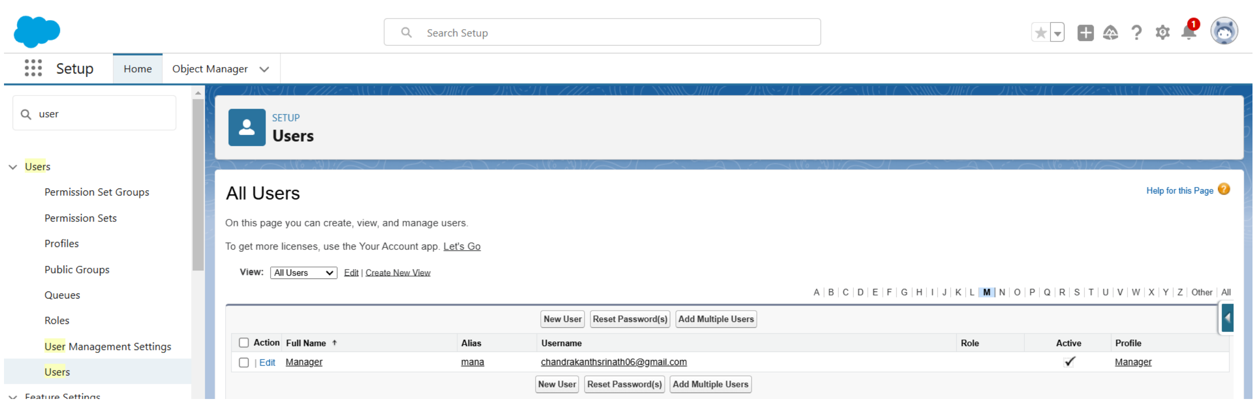


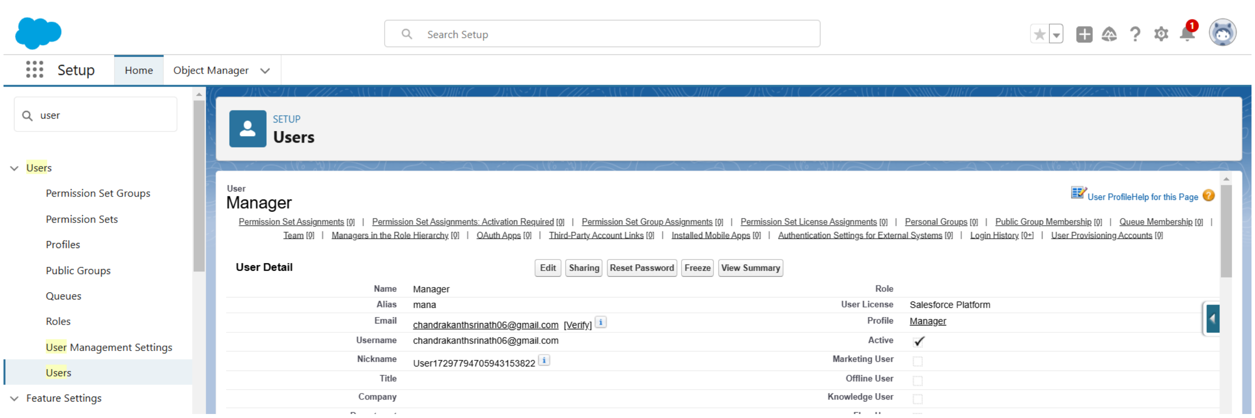
choosethe Profile as "System Administrator," and save.



- User 2

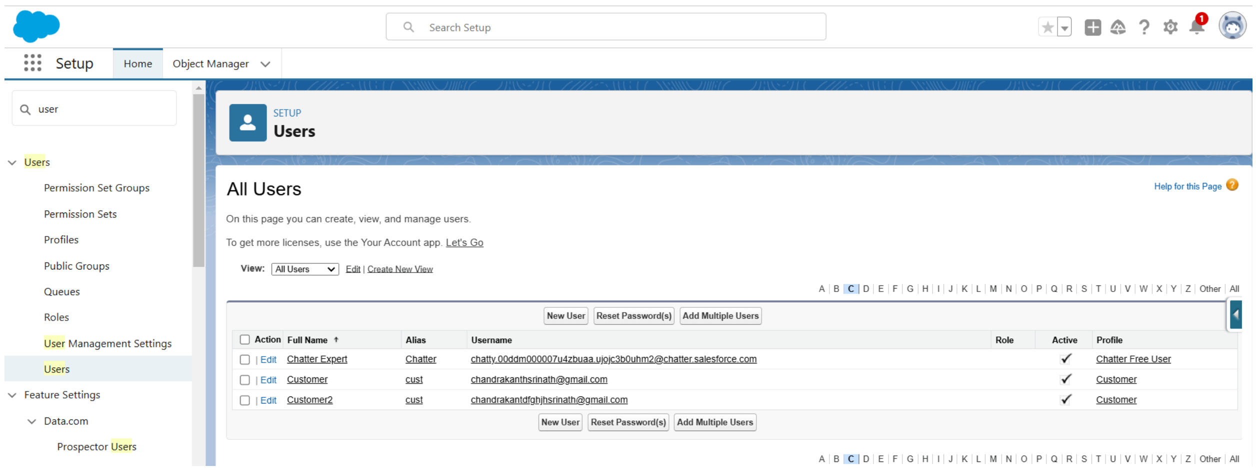
- In Setup, navigate to Administration > Users > New User, fill in the Last Name as "Manager," set the Role to "Sales Manager," select the License as "Salesforce Platform," choose the Profile as "Manager," and save.

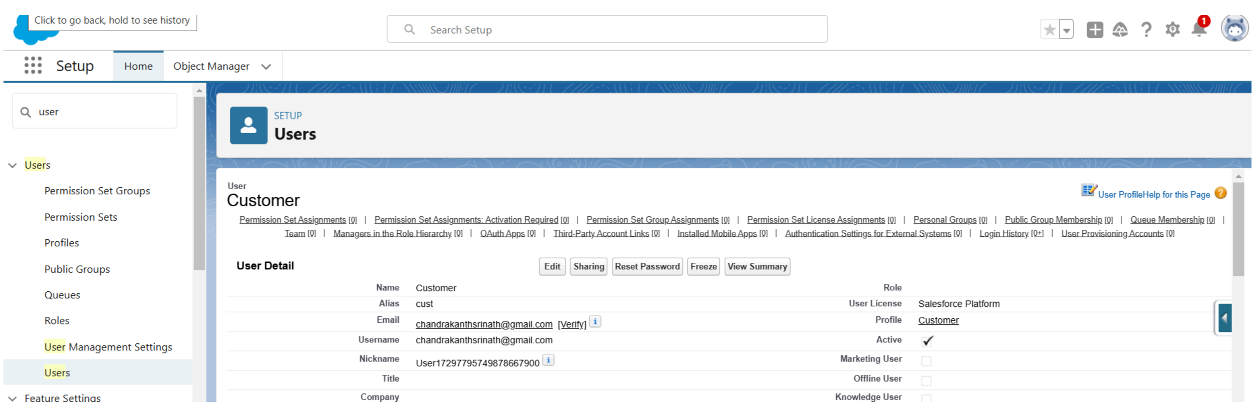


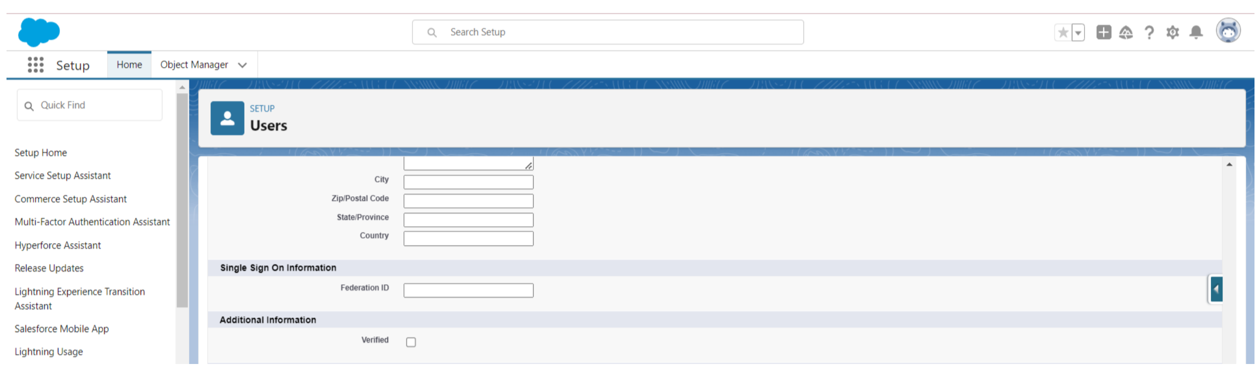


User 3

In Setup, navigate to Administration > Users > New User, fill in the Last Name as "Customer," set the Role to "Customer," select the License as "Salesforce Platform," choose the Profileas "Customer," ensurethe "Verified" check box is unchecked, and save.



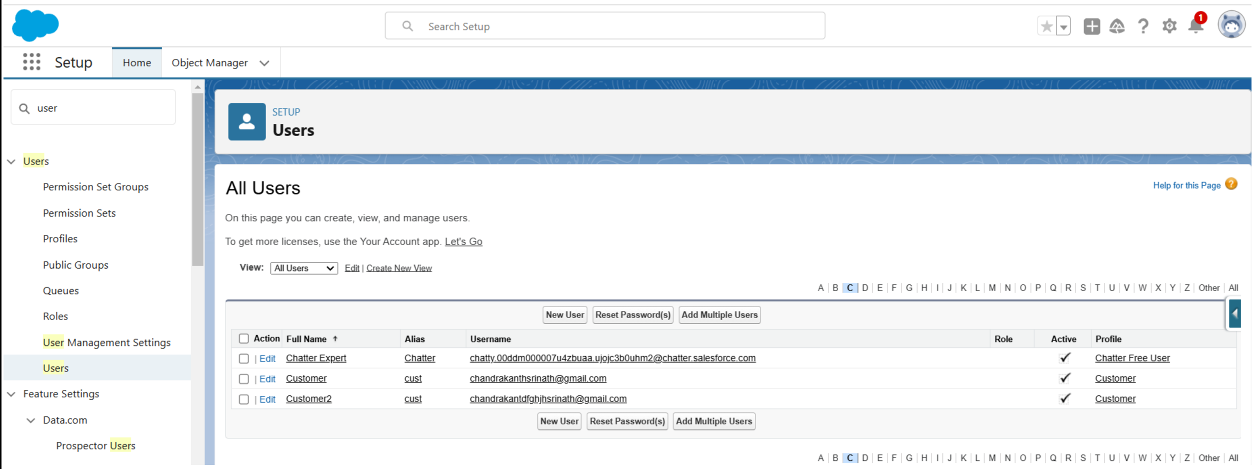


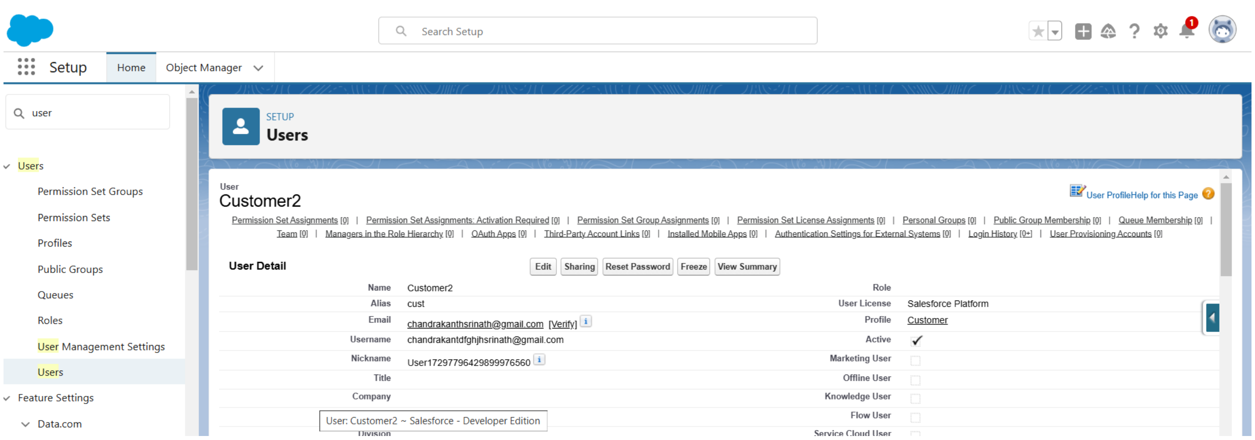


User 4

- In Setup, navigateto Administration > Users > New User, fill in the Last Name as

"Customer2," set the Role to "Customer," selectthe License as "Salesforce Platform," choose the Profileas "Customer," ensure the "Verified" check box is checked, and save.



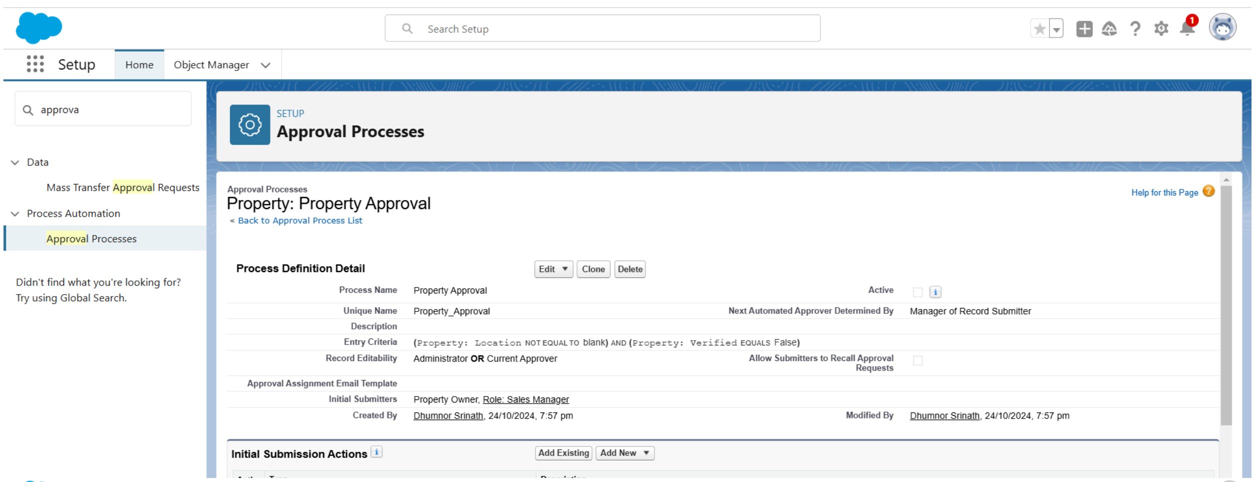


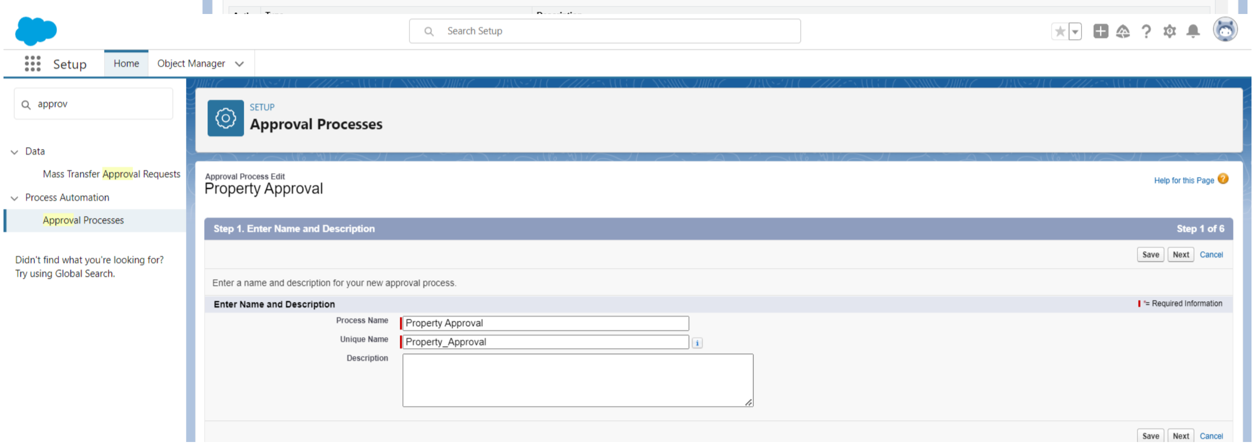
Task 9: Create an Approval Process for Property Object

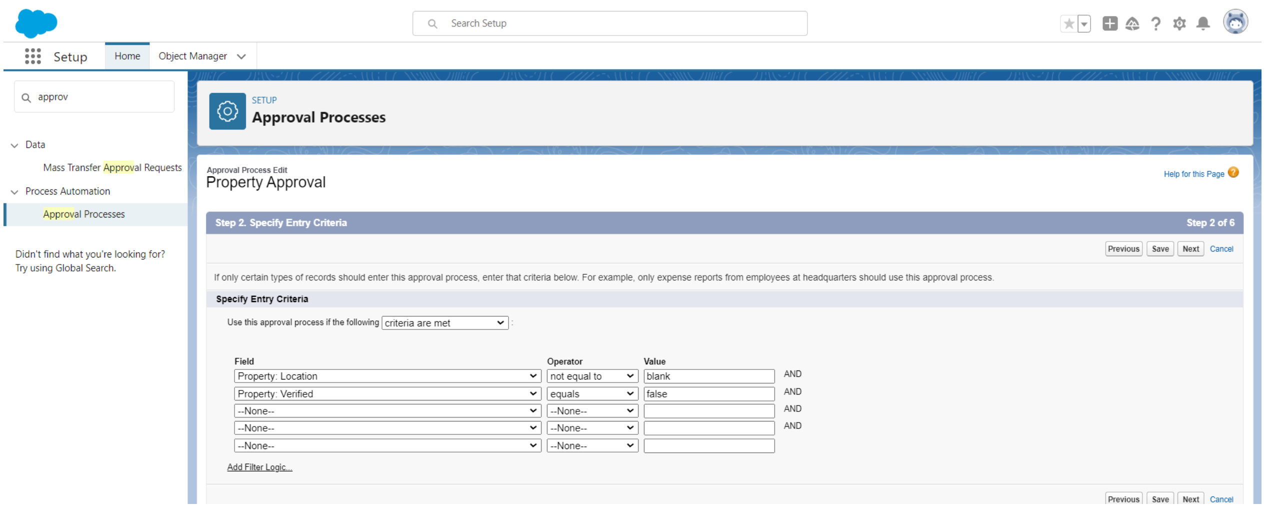
An Approval process to approve or reject the records as according

- Activity 1

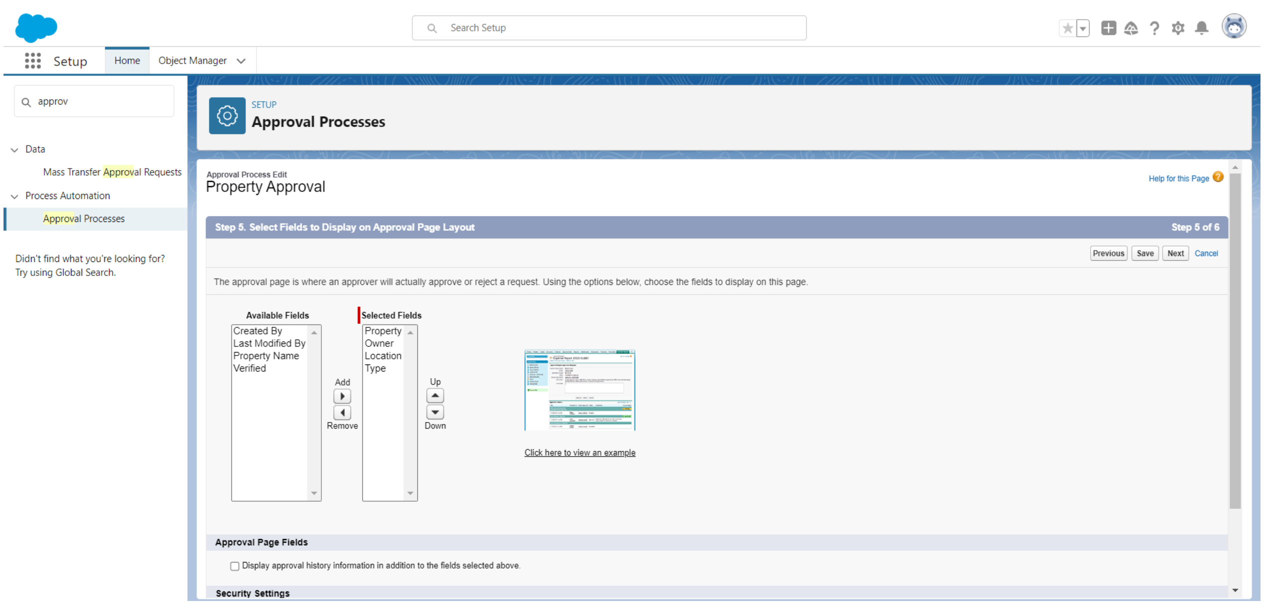
- In Setup, navigate to Process Automation > Approval Process, create a "Property Approval" process with criteria "Location is not equal to blank" and "Verified equals false," set the next automated approver to "Manager," enable record editability for administrators or current approvers, display Property, Owner, Location, and Type on the approval page layout, set initial submitters as Property Owner and Sales Manager, save, add an approval step "Executive Approval" for all records with the approver "Sales Executive," save, add a field update "Verified Property" to set the Verified checkbox to True, add a field update "UnVerified Property" to set the Verified checkbox to False, and activate the approval process.







Search Setup
Setup
Home
Object Manager
approv
Data
Mass Transfer Approval Requests
Process Automation
Approval Processes
Didn't find what you're looking for?
Try using Global Search.
SETUP
Approval Processes
Approval Process Edit
Property Approval
Help for this Page
Step 2. Specify Entry Criteria
Step 2 of 6
Previous Save Next Cancel
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
--None-- --None-- AND
--None-- --None-- AND
--None-- --None--
Add Filter Logic...



Search Setup
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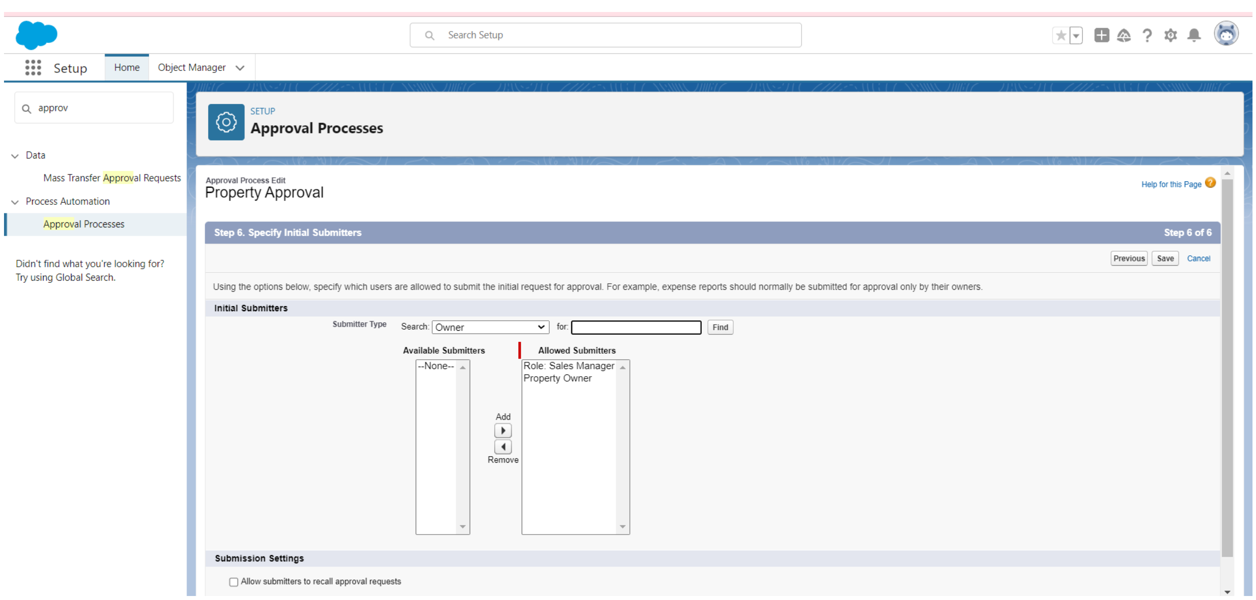
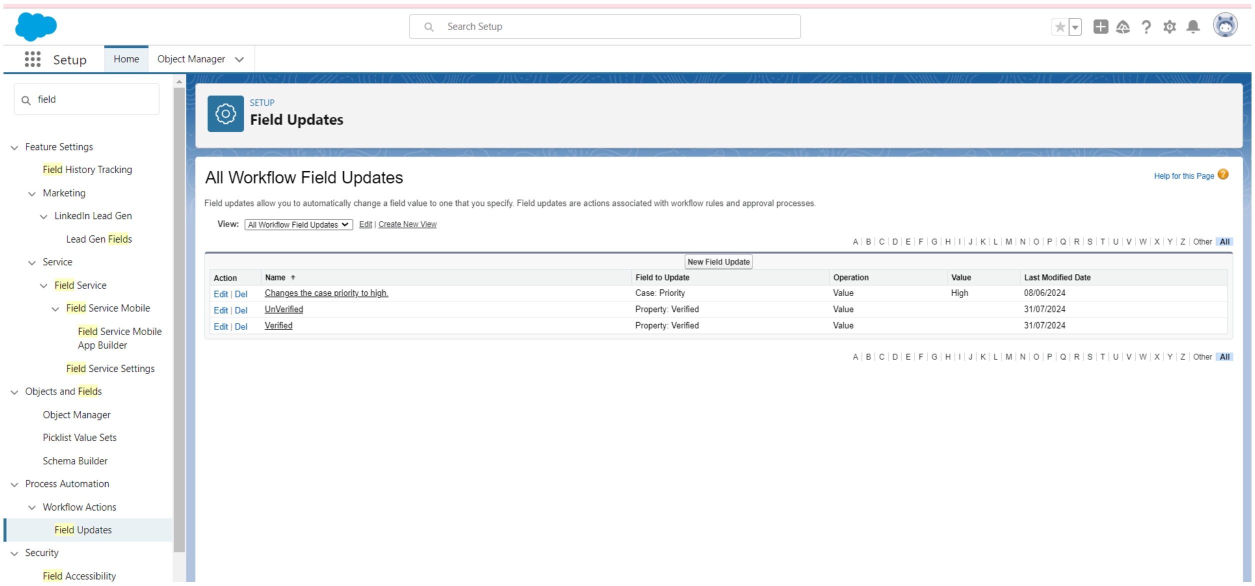
SETUP
Approval Processes
Approval Process Edit
Property Approval
Help for this Page
Step 5. Select Fields to Display on Approval Page Layout
Step 5 of 6
Previous Save Next Cancel
The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.
Available Fields
Created By
Last Modified By
Property Name
Verified
Add
Remove
Selected Fields
Property
Owner
Location
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



Search Setup
Setup
Home
Object Manager
approv
Data
Mass Transfer Approval Requests
Process Automation
Approval Processes
Didn't find what you're looking for?
Try using Global Search.
SETUP
Approval Processes
Approval Process Edit
Property Approval
Help for this Page
Step 6. Specify Initial Submitters
Step 6 of 6
Previous Save Cancel
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: Owner
for:
Find
Available Submitters
--None--
Add
Remove
Allowed Submitters
Role: Sales Manager
Property Owner
Submission Settings
Allow submitters to recall approval requests

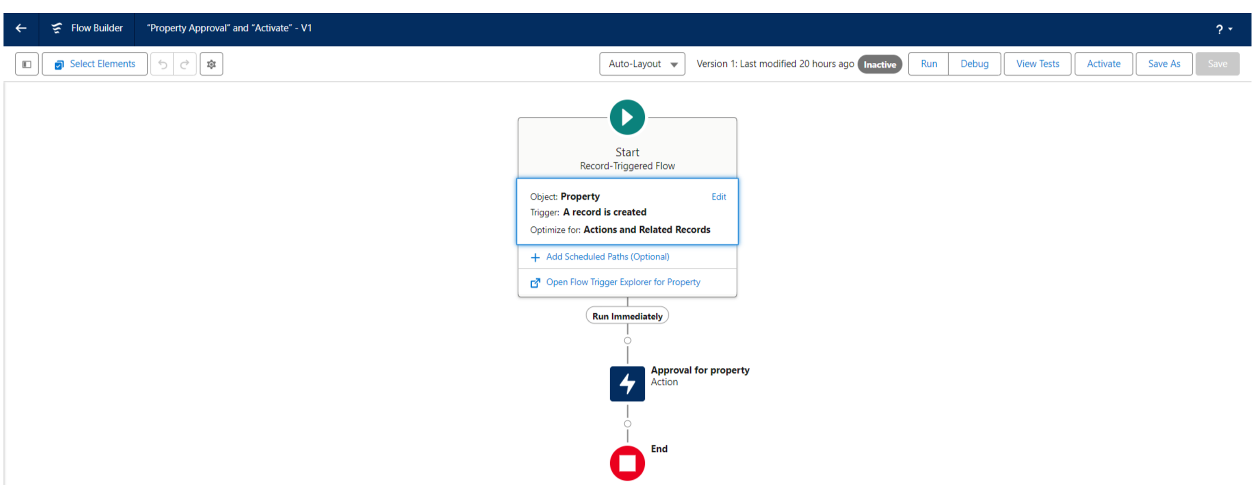


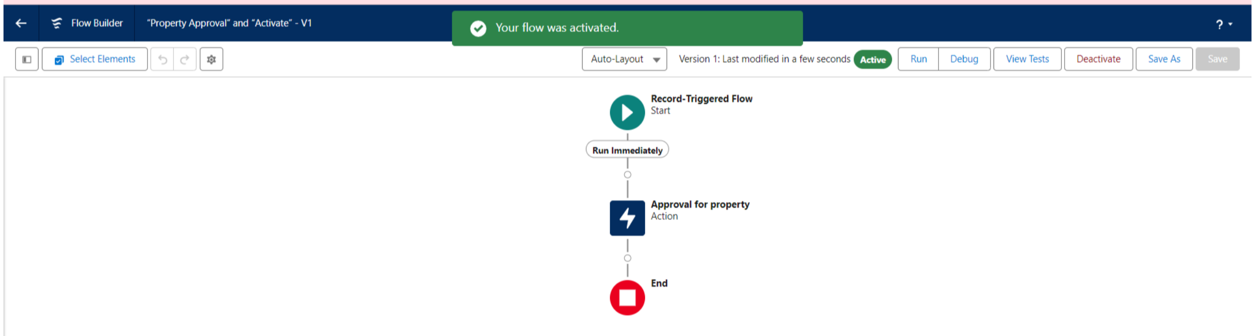
Task 10: Create a Record trigger flow to submit the Approval Process Automatically.

A flow that can submit the records directly for approval

- Activity 1

- In Setup, search for Flows, click on New, select "Record Trigger Flow," choose the Property object, set the trigger to "A record is created," add an action "Submit for Approval" with the label "Approval for property" and Record Id as {!$Record.Id}, save the flow with the label "Property Approval," and activate.



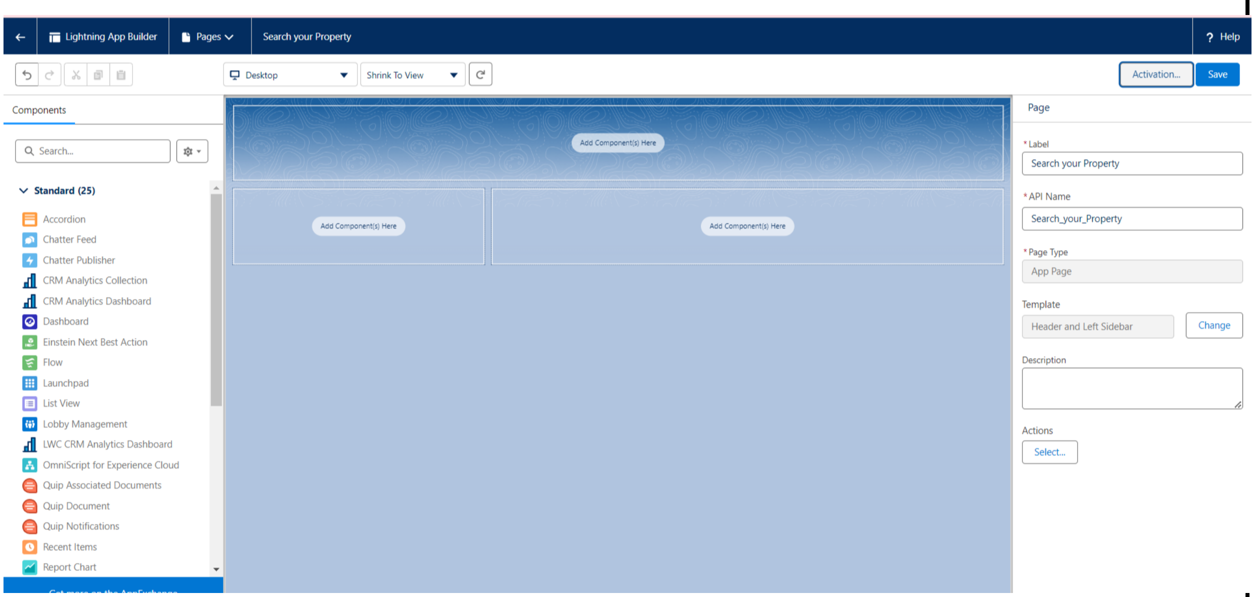


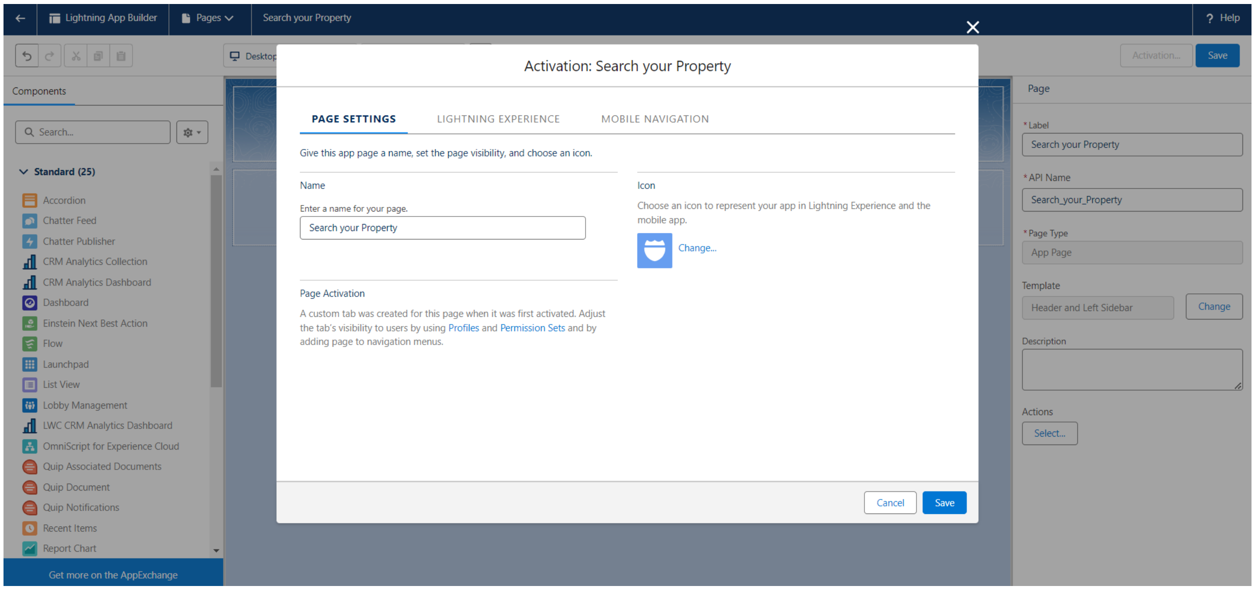
Task 11: Create anAppPage

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

Activity 1

In Setup, navigate to Lightning App Builder, create a new App Page with the label "Search your Property," choose "Header and Left Sidebar" layout, save and activate the page, select "Activate for all Users" from Page Settings, and in Lightning Experience, add the page to "Property Details," then save.



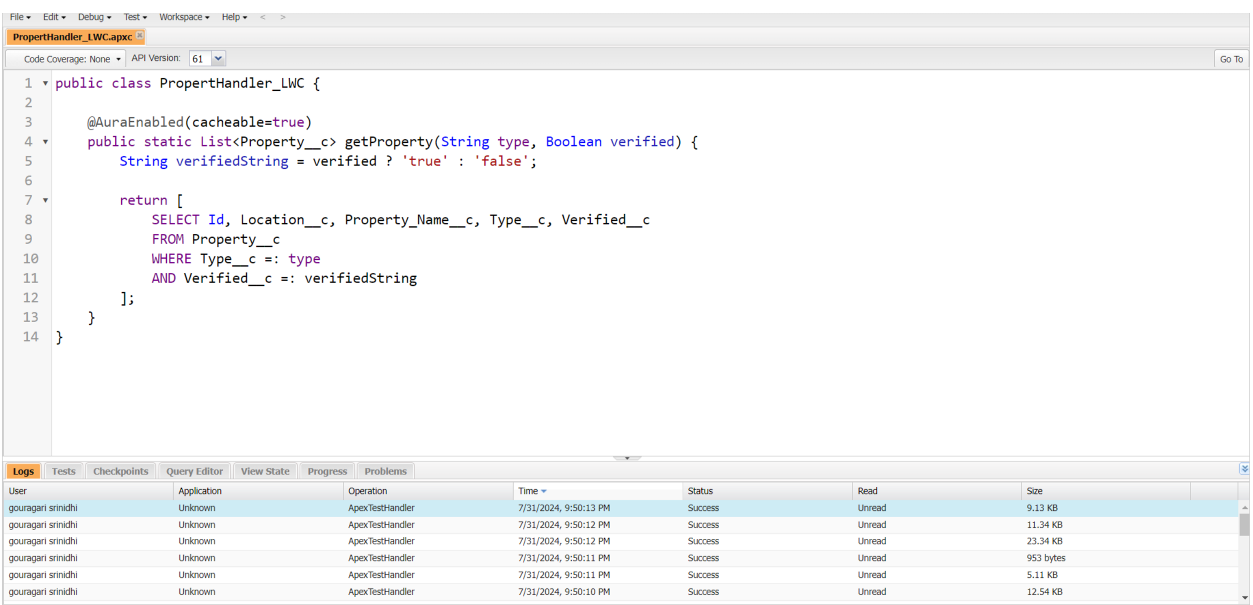


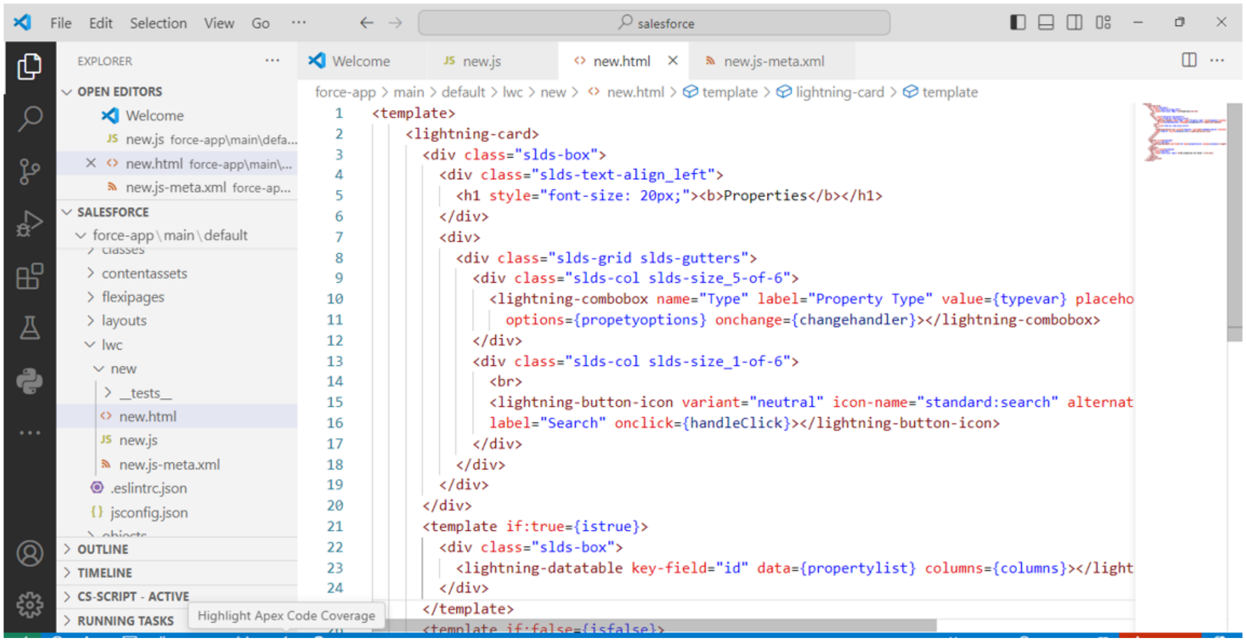
Task 12: Create a LWC Component

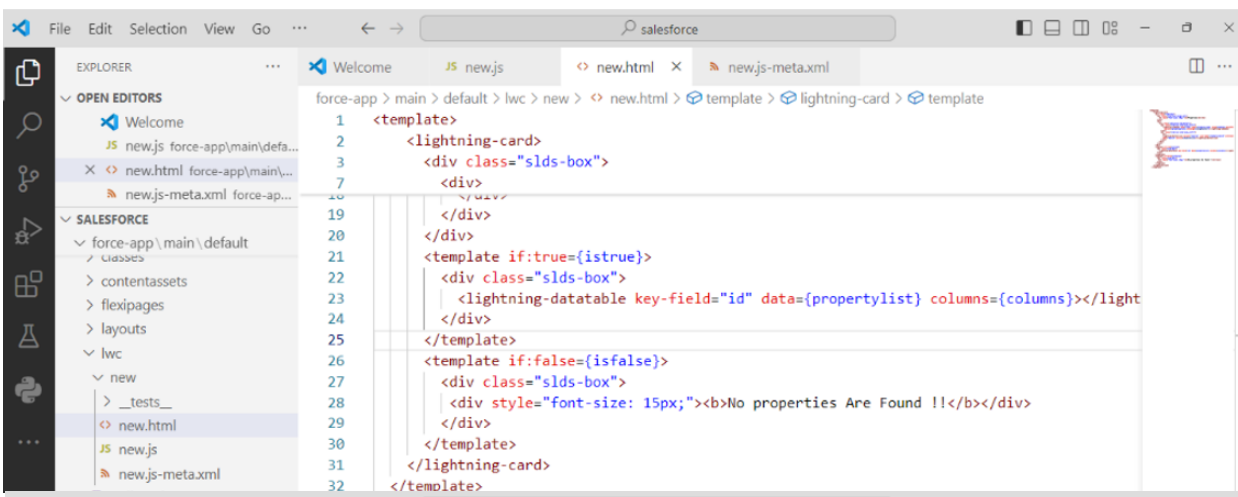
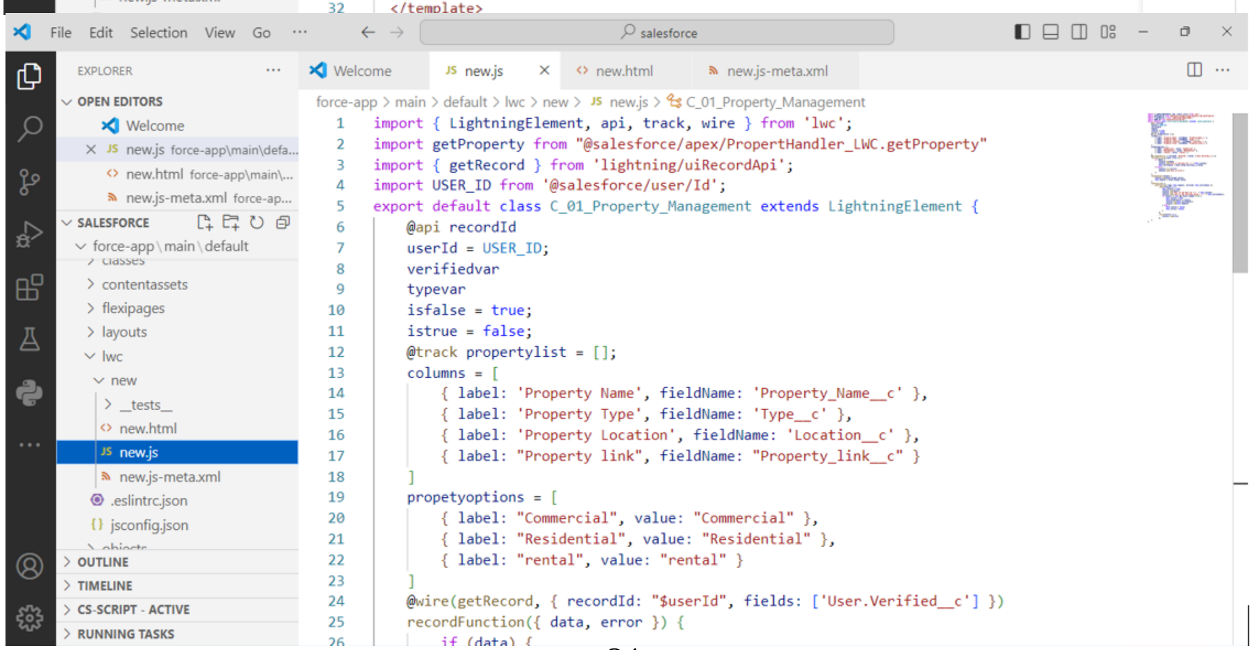
Create an LWC Component for the customers so that only verified customers can access the verified properties and non-Verified customers can access non verified properties, and deploy it on “Search your Property Page”

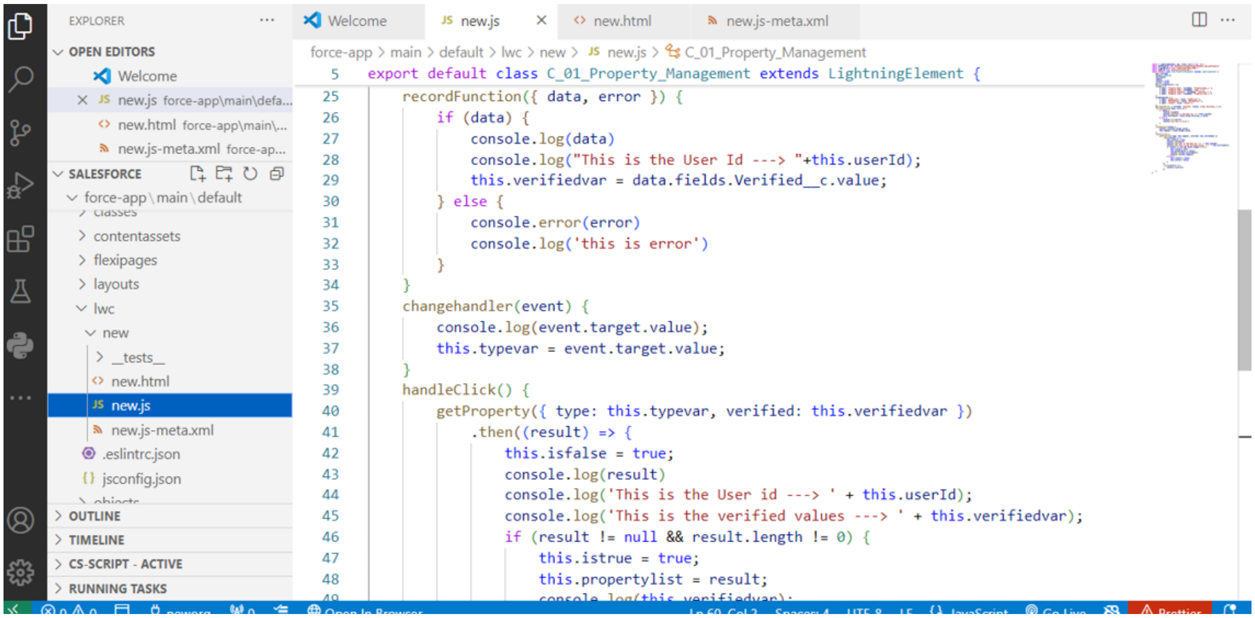
- Activity 1

- Create an Apex class named "PropertyHandler_LWC" and make it Aura enabled, then in VSCode, authorize your org, create a Lightning Web Component, write the provided code in the HTML, JS, and metafile, and deploy the component to the org.

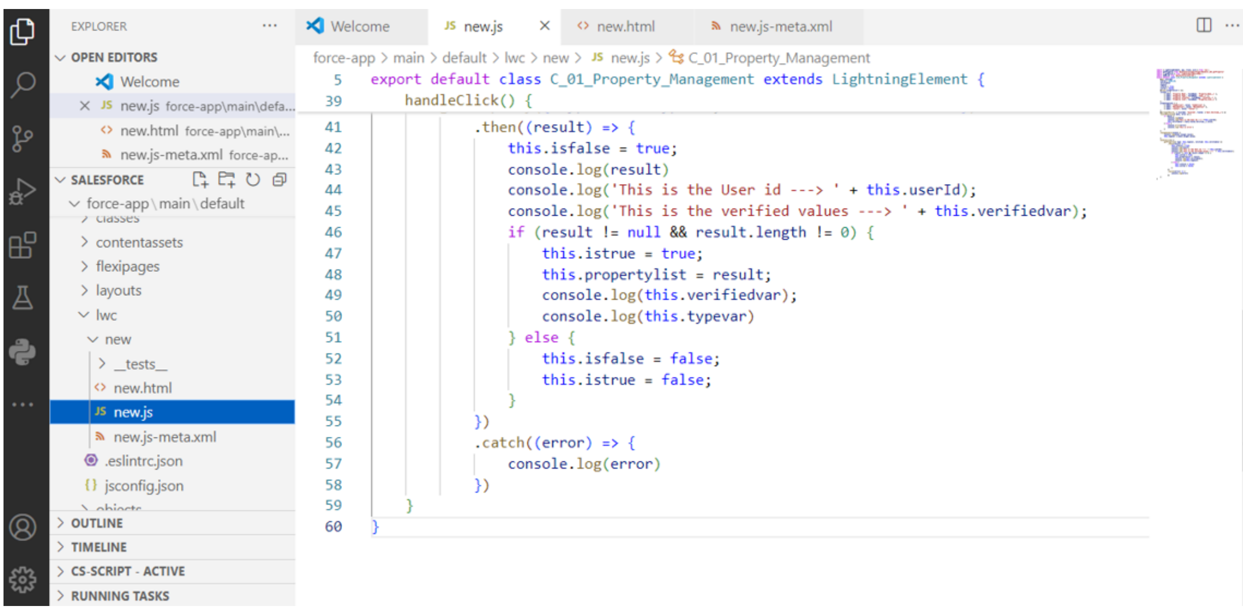



force-app > main > default > lwc > new > new.html > template > lightning-card > template
<template>
<lightning-card>
<div class="slds-box">
<div class="slds-text-align_left">
<h1 style="font-size: 20px;">Properties</h1>
</div>
<div>
<div class="slds-grid slds-gutters">
<div class="slds-col slds-size_5-of-6">
<lightning-combobox name="Type" label="Property Type" value={typeval} placeho
options={propetyoptions} onchange={changehandler}></lightning-combobox>
</div>
<div class="slds-col slds-size_1-of-6">

<lightning-button-icon variant="neutral" icon-name="standard:search" alternat
label="Search" onclick={handleClick}></lightning-button-icon>
</div>
</div>
</div>
</div>
<template if:true={istrue}>
<div class="slds-box">
<lightning-datatable key-field="id" data={propertylist} columns={columns}></light
</div>
</template>

force-app > main > default > lwc > new > new.html > template > lightning-card > template
<template>
<lightning-card>
<div class="slds-box">
<div>
</div>
</div>
<template if:true={istrue}>
<div class="slds-box">
<lightning-datatable key-field="id" data={propertylist} columns={columns}></light
</div>
</template>
<template if:false={isfalse}>
<div class="slds-box">
<div style="font-size: 15px;">No properties Are Found !!</div>
</div>
</template>
</lightning-card>
</template>

force-app > main > default > lwc > new > new.js > C_01_Property_Management
import { LightningElement, api, track, wire } from 'lwc';
import getProperty from "@salesforce/apex/PropertHandler_LWC.getProperty"
import { getRecord } from 'lightning/uiRecordApi';
import USER_ID from '@salesforce/user/Id';
export default class C_01_Property_Management extends LightningElement {
@api recordId
userId = USER_ID;
verifiedvar
typeval
isfalse = true;
istrue = false;
@track propertylist = [];
columns = [
{ label: 'Property Name', fieldName: 'Property_Name__c' },
{ label: 'Property Type', fieldName: 'Type__c' },
{ label: 'Property Location', fieldName: 'Location__c' },
{ label: "Property link", fieldName: "Property_link__c" }
]
propetyoptions = [
{ label: "Commercial", value: "Commercial" },
{ label: "Residential", value: "Residential" },
{ label: "rental", value: "rental" }
]
@wire(getRecord, { recordId: "$userId", fields: ['User.Verified__c'] })
recordFunction({ data, error }) {

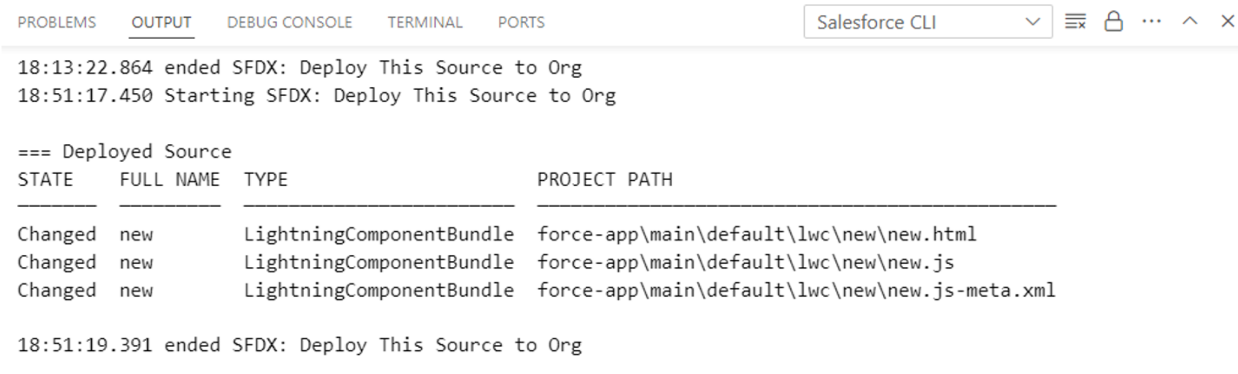


```javascript
export default class C_01_Property_Management extends LightningElement {
    recordFunction({ data, error }) {
        if (data) {
            console.log(data)
            console.log("This is the User Id ---> "+this.userId);
            this.verifiedvar = data.fields.Verified__c.value;
        } else {
            console.error(error)
            console.log('this is error')
        }
    }
    changehandler(event) {
        console.log(event.target.value);
        this.typevar = event.target.value;
    }
    handleClick() {
        getProperty({ type: this.typevar, verified: this.verifiedvar })
            .then((result) => {
                this.isfalse = true;
                console.log(result)
                console.log('This is the User id ---> ' + this.userId);
                console.log('This is the verified values ---> ' + this.verifiedvar);
                if (result != null && result.length != 0) {
                    this.istrue = true;
                    this.propertylist = result;
```



```javascript
export default class C_01_Property_Management extends LightningElement {
    handleClick() {
            .then((result) => {
                this.isfalse = true;
                console.log(result)
                console.log('This is the User id ---> ' + this.userId);
                console.log('This is the verified values ---> ' + this.verifiedvar);
                if (result != null && result.length != 0) {
                    this.istrue = true;
                    this.propertylist = result;
                    console.log(this.verifiedvar);
                    console.log(this.typevar)
                } else {
                    this.isfalse = false;
                    this.istrue = false;
                }
            })
            .catch((error) => {
                console.log(error)
            })
    }
}
```

```xml
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
    <apiVersion>59.0</apiVersion>
    <isExposed>true</isExposed>
    <targets>
        <target>lightning__RecordPage</target>
        <target>lightning__AppPage</target>
        <target>lightning__HomePage</target>
            </targets>
</LightningComponentBundle>
```

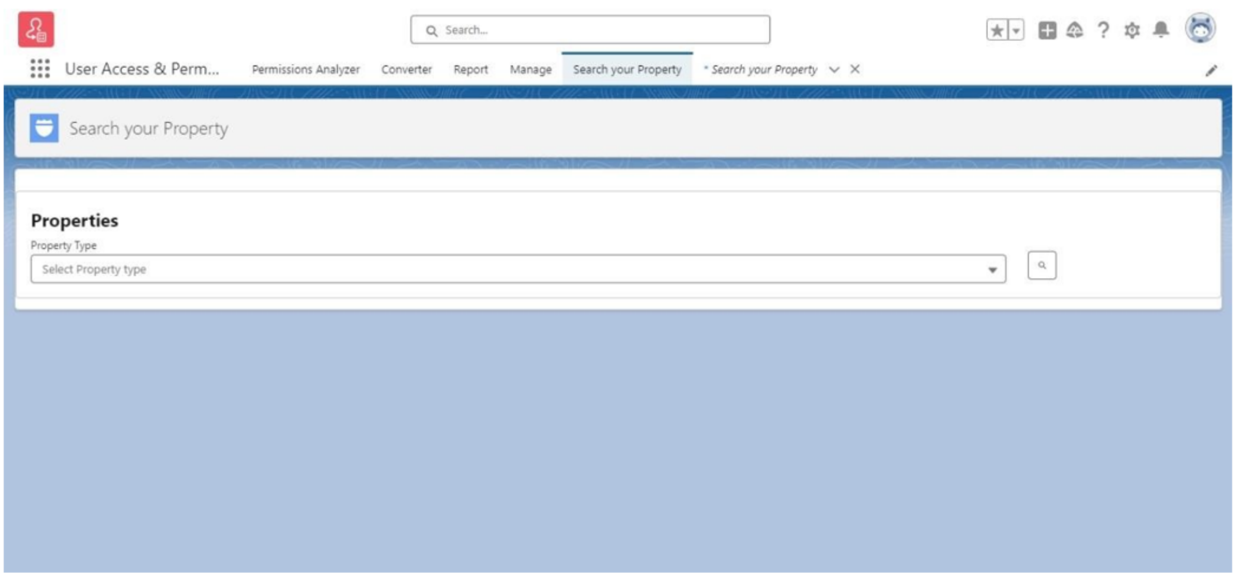


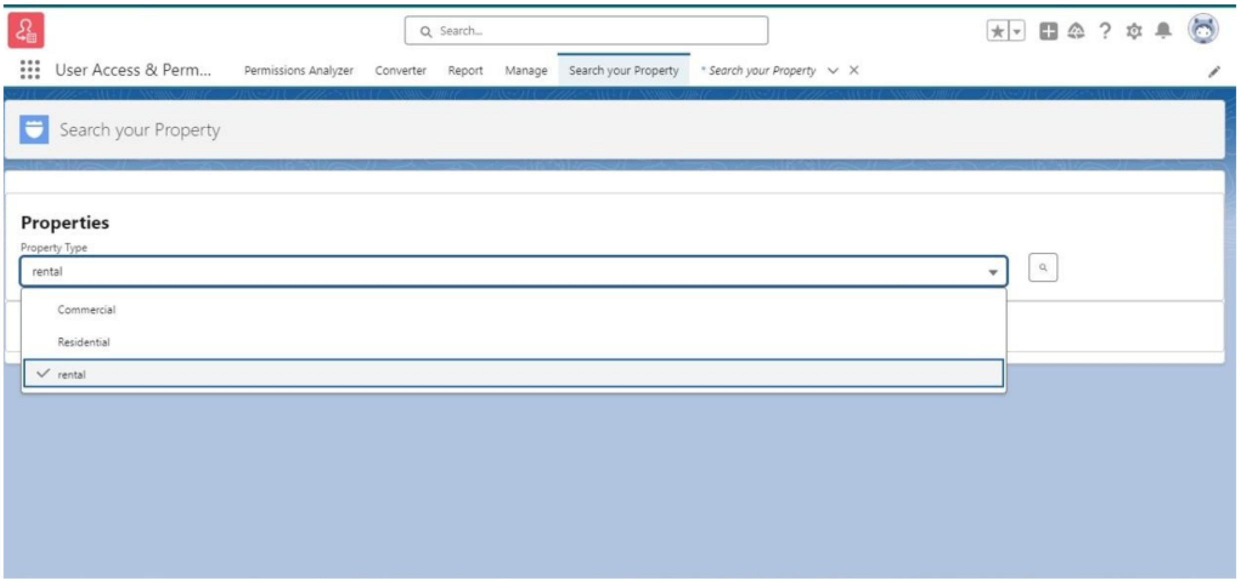
Task 13: Drag this Component to your App Page

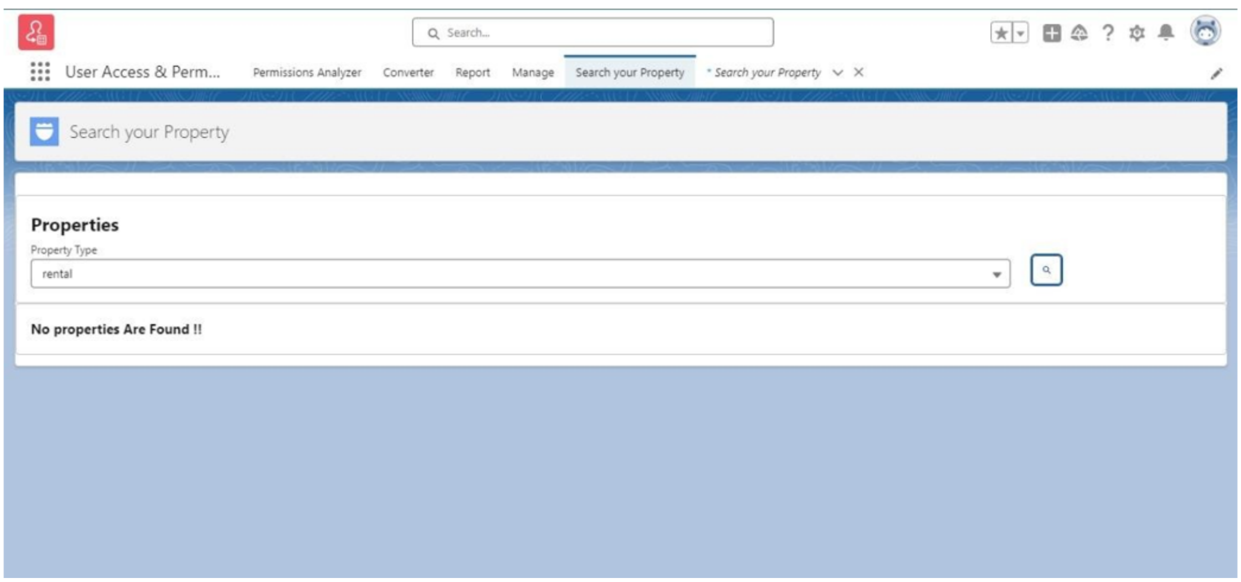
Adding the Component to your Page

-Activity 1

-In Setup, go to App Launcher, search for Property Details, click the gear icon to Edit Page, drag the component to your App Page, and save the page.





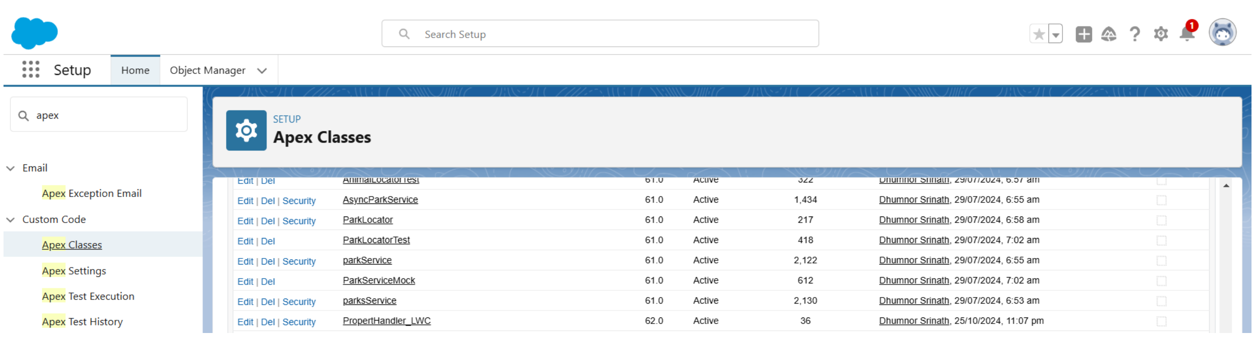


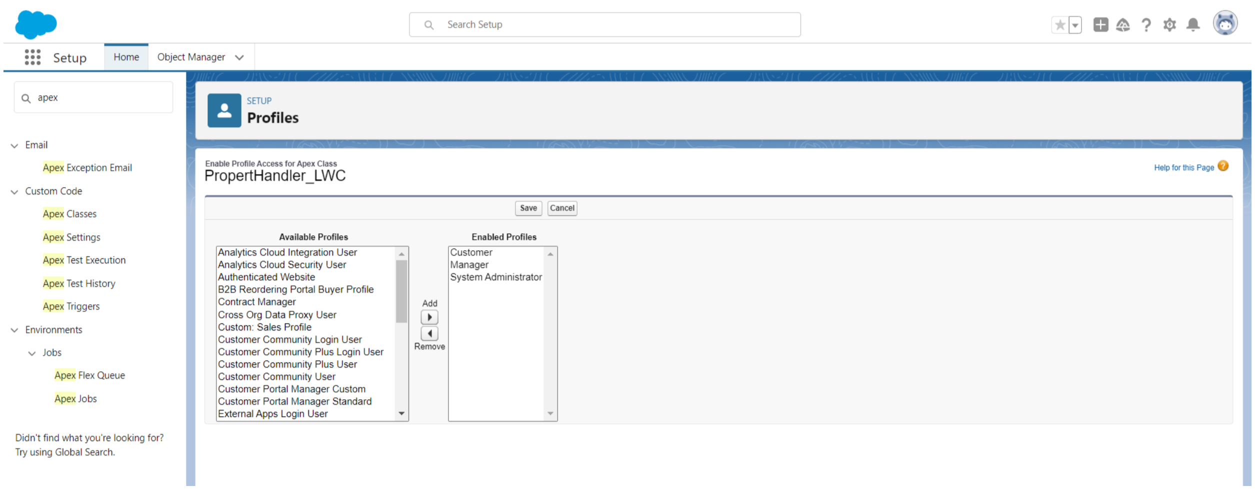
Task 14: GiveAccessofApex Classes to Profiles

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

Activity 1

In Setup, search for Apex Classes,click on "Security" next to "PropertyHandler_LWC," add the "Manager" and "Customer" profiles, and save.


Search Setup
Setup
Home
Object Manager
apex
Email
Apex Exception Email
Custom Code
Apex Classes
Apex Settings
Apex Test Execution
Apex Test History
SETUP
Apex Classes
Edit | Del | Security AsyncParkService 61.0 Active 1,434 Dhumnor Srinath, 29/07/2024, 6:55 am
Edit | Del | Security ParkLocator 61.0 Active 217 Dhumnor Srinath, 29/07/2024, 6:58 am
Edit | Del ParkLocatorTest 61.0 Active 418 Dhumnor Srinath, 29/07/2024, 7:02 am
Edit | Del | Security parkService 61.0 Active 2,122 Dhumnor Srinath, 29/07/2024, 6:55 am
Edit | Del ParkServiceMock 61.0 Active 612 Dhumnor Srinath, 29/07/2024, 7:02 am
Edit | Del | Security parksService 61.0 Active 2,130 Dhumnor Srinath, 29/07/2024, 6:53 am
Edit | Del | Security PropertHandler_LWC 62.0 Active 36 Dhumnor Srinath, 25/10/2024, 11:07 pm


Search Setup
Setup
Home
Object Manager
apex
Email
Apex Exception Email
Custom Code
Apex Classes
Apex Settings
Apex Test Execution
Apex Test History
Apex Triggers
Environments
Jobs
Apex Flex Queue
Apex Jobs
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Enable Profile Access for Apex Class
PropertHandler_LWC
Help for this Page
Save
Cancel
Available Profiles
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Sales Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Customer Portal Manager Custom
Customer Portal Manager Standard
External Apps Login User
Add
Remove
Enabled Profiles
Customer
Manager
System Administrator

THANK YOU