

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

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1. Project overview

The CRM (Customer Relationship Management) application is designed to streamline and enhance the process of managing clients and their property-related requirements. This application will serve as a centralized platform for real estate agencies, brokers, and property managers to handle client information, track property requirements, and maintain clear communication. The system aims to improve efficiency, client satisfaction, and business outcomes.

2. Objectives

Business Goals:

- Improve client engagement through personalized communication and timely responses.
- Automate key workflows to reduce manual effort and increase operational efficiency.
- Boost property sales and rental conversions by effectively matching client needs with available listings.
- Leverage centralized data to gain actionable insights and support data-driven decision-making.
- Foster scalability to accommodate business growth and evolving market demands.

Specific Outcomes:

- A centralized client relationship management system to store and organize client data and interaction history.
- A property management module that includes listing details, multimedia content, and real-time availability updates.
- Advanced search and matching functionality to align client preferences with suitable properties.
- Automated processes for appointment scheduling, follow-up reminders, and property recommendations.
- Real-time analytics dashboards to track client behavior, property performance, and team productivity.
- Integrated communication tools (email, SMS, and notifications) to streamline client-agent interactions.
- A secure, role-based access system to ensure data privacy and regulatory compliance.
- A responsive platform accessible via both web and mobile interfaces.

3. Salesforce Key Features and Concepts Utilized

Sales Cloud: Facilitates lead and opportunity management, enabling efficient tracking of client interactions and property deals.

Service Cloud: Provides tools for managing client inquiries and support cases, ensuring timely and effective communication.

Marketing Cloud: Offers capabilities for personalized marketing campaigns, helping to engage clients with targeted property listings and updates.

Einstein Analytics: Delivers advanced analytics and AI-driven insights, allowing for data-driven decision-making and trend analysis in property markets.

AppExchange: Access to a marketplace of pre-built applications and components, such as Real Estate 360, which offers specialized functionalities for real estate management.

Customization and Integration: Salesforce's platform supports extensive customization and integration with third-party systems, enabling the development of tailored solutions that meet specific business needs.

By integrating these Salesforce features, the CRM application can provide a comprehensive solution for managing client relationships and property portfolios, enhancing operational efficiency and client satisfaction.

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

1. CUSTOMER RELATIONSHIP MANAGEMENT

Customer Relationship Management (CRM) is a strategy for managing a company's interactions with current and potential customers. It involves using technology to organize, automate, and synchronize sales, marketing, customer service, and technical support. The goal of CRM is to improve business relationships, streamline processes, and increase profitability. CRM systems compile customer data from various channels, including a company's website, telephone, email, live chat, and social media. These systems can give staff detailed information about customers' personal information, purchase history, preferences, and concerns. Effective CRM helps businesses understand customer needs, enhance customer satisfaction, and foster loyalty.

2. OVERVIEW

Dreams World Properties integrates Salesforce to streamline customer interactions. Website engagement triggers automated record creation in Salesforce, capturing customer details and preferences. Salesforce categorizes users as approved or non-approved, offering tailored property selections to approved users. This enhances user experience and efficiency, providing personalized recommendations and broader listings. Seamless integration optimizes operations, improving customer engagement and facilitating growth in the real estate market.

3. USE CASE

Dreams World Properties is embarking on a transformative journey by integrating Salesforce into their business operations to streamline customer interactions. With the aim of enhancing user experience and efficiency, the company seeks to automate its processes seamlessly. One of the primary objectives is to establish a seamless connection between their website and Salesforce platform.

Upon a customer expressing interest on the website, an automated system will trigger the creation of a corresponding record within the Salesforce database. This record will serve as a comprehensive profile capturing essential details about the prospective customer and their expressed preferences.

Furthermore, Through Salesforce's robust capabilities, Dreams World Properties intends to categorize users into two distinct categories: approved and non-approved. Approved users will enjoy privileged access to a

curated selection of properties tailored to their preferences and requirements. On the other hand, nonapproved users will still have access to a broader range of property listings but may not benefit from the personalized experience offered to approved users.

4. INTRODUCTION TO SALESFORCE

Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

WHAT IS SALESFORCE?

Salesforce is your customer success platform, designed to help you sell, service, market, analyse, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

The screenshot shows the Trailhead website homepage. At the top, there's a navigation bar with links for Products, Industries, Customers, Learning, Support, Company, and Salesforce+. A search bar and a sign-up button are also present. The main banner features a cartoon illustration of a landscape with a mountain, a bear, and a character, with the text 'SKILL UP FOR THE FUTURE' and 'Learn new skills from anywhere'. Below the banner, there's a section titled 'TRAILHEAD IS THE FUN WAY TO LEARN' with three icons: 'Learn In-Demand Skills' (book icon), 'Earn Resume-Worthy Credentials' (document icon), and 'Connect to Opportunities' (globe icon). Each section has a brief description.

The screenshot shows a Salesforce event page for a 'World Tour Essentials Mumbai Virtual Broadcast' held on Wednesday, 17 July. The page features a cartoon illustration of a city skyline, palm trees, and characters. It includes a 'Register Now' button, a 'Learn valuable skills for free, with Trailhead.' section, and a 'Questions?' chat box. The top navigation bar includes links for Products, Industries, Customers, Learning, Support, Company, and Salesforce+, along with a contact number (1800-420-7332) and a login link.

5. REQUIREMENTS: -

i. Website Integration Requirements:

Implement a form on the website for users to express interest in property listings. Ensure the form captures essential details such as name, contact information, preferred property type, location, budget, etc. Set up

validation rules to ensure data accuracy and completeness. Integrate the form submission process with Salesforce. **ii. Salesforce Configuration Requirements:**

Set up Salesforce objects and fields to store customer data. This includes fields for name, contact information, preferences, approval status, etc. Define workflows or processes to automate the creation of records when a user submits the form on the website. Implement validation rules and data integrity checks to maintain data quality. Configure Salesforce security settings to control access to customer records based on approval status. **iii. Approval Process Requirements:**

Define criteria for categorizing users as approved or non-approved based on specific parameters such as budget, property preferences, etc. Implement an approval process in Salesforce to review and approve users. Set up email notifications or alerts to notify relevant stakeholders when a user is approved or rejected. Ensure that approved users are granted access to curated property listings tailored to their preferences. **iv. User Experience Requirements:**

Design user interfaces in Salesforce for managing customer records, approval processes, and property listings. Ensure a seamless user experience for both customers and internal users interacting with Salesforce. Provide training and documentation for internal staff on how to use the Salesforce system effectively.

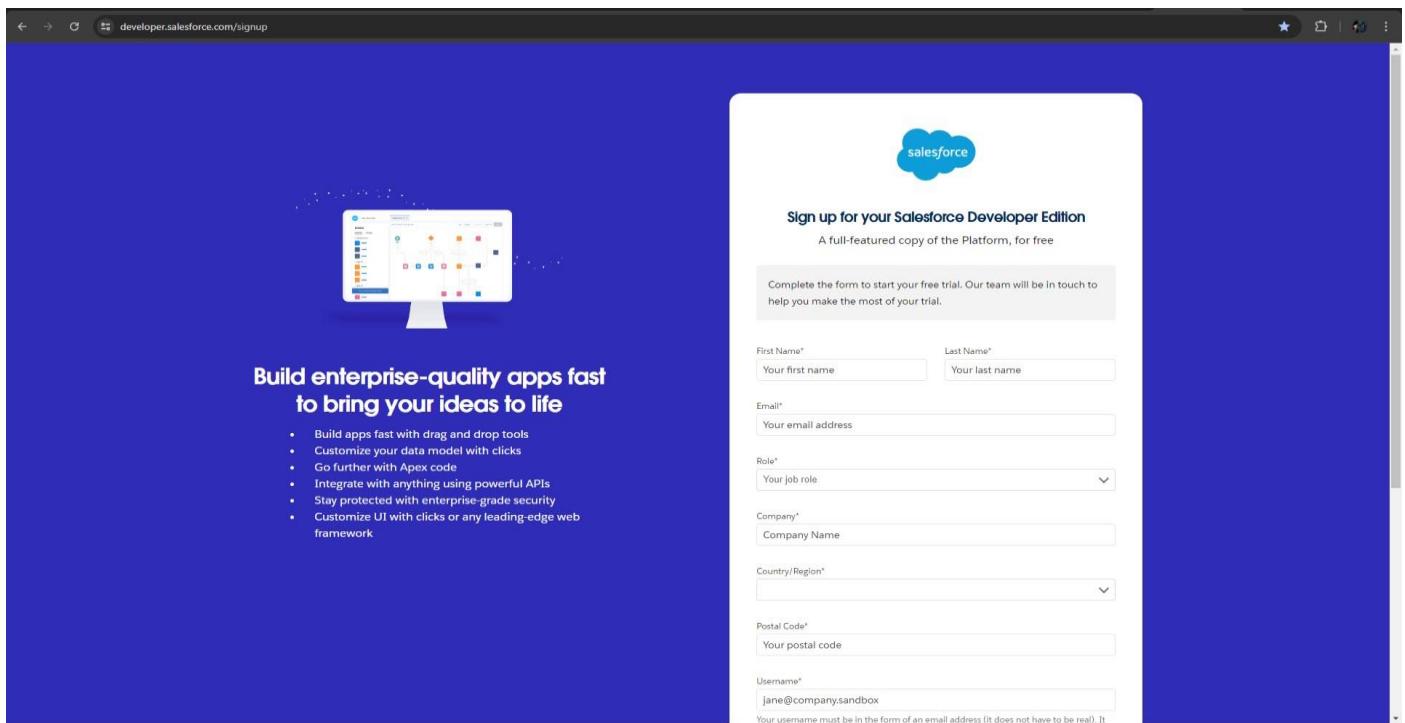
v. Integration Testing and Quality Assurance Requirements:

Conduct thorough testing of the integration between the website and Salesforce to ensure data is accurately captured and transferred. Perform end-to-end testing of the approval process to verify that users are categorized correctly and granted appropriate access. Identify and resolve any issues or bugs encountered during testing.

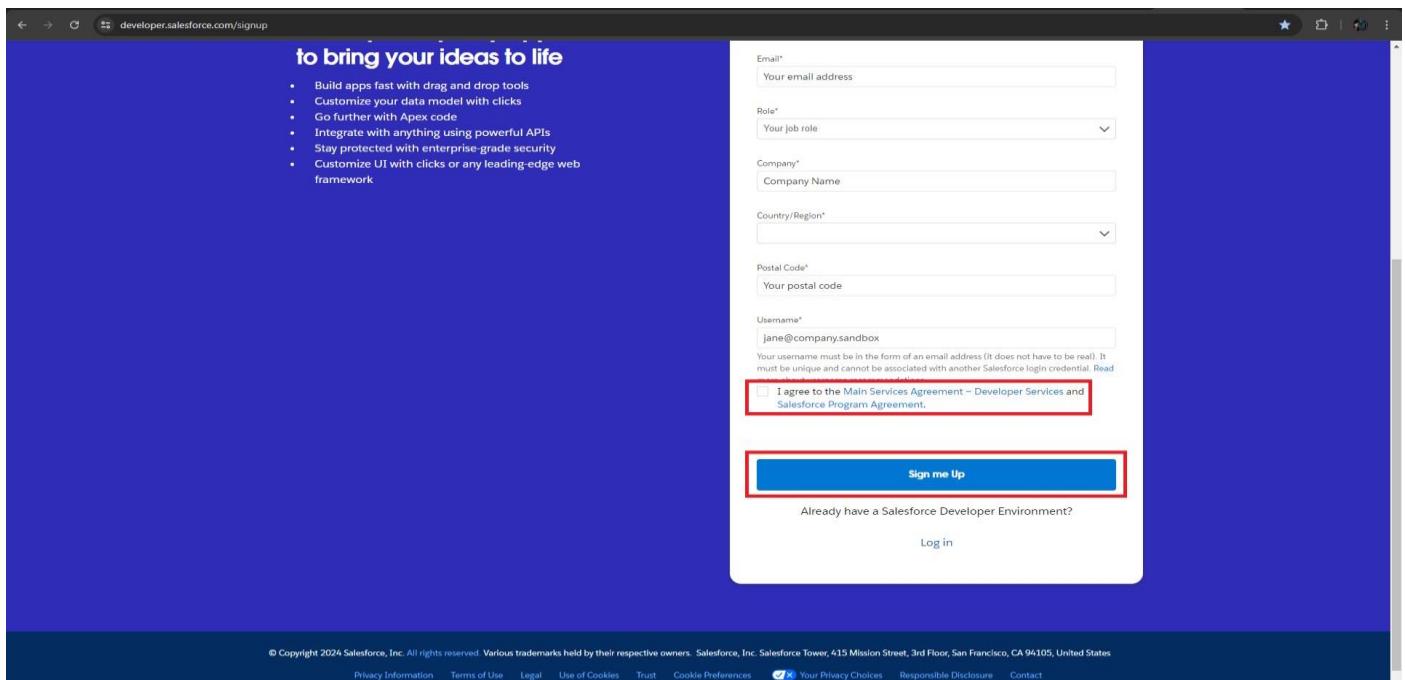
6. PROJECT IMPLEMENTATION: -

Step 1: Creating a Developer Org Account.

- Go to <https://developer.salesforce.com/signup>.

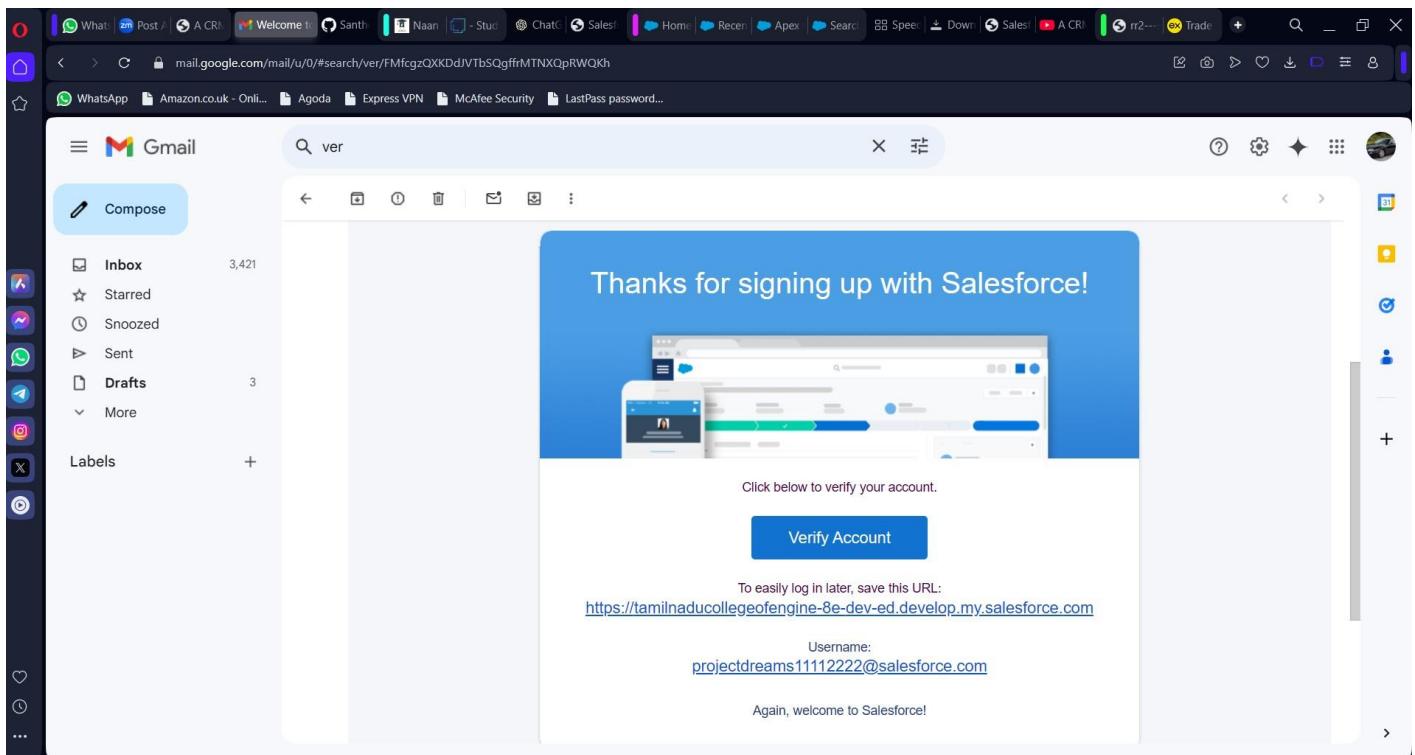


- Fill the details to create a Developer Org Account.
- All the details are must to ensure seamless experience for creating a Developer Org Account.
- One Point to Note that Username must be unique, and you can create any number of accounts using the same E-mail address.



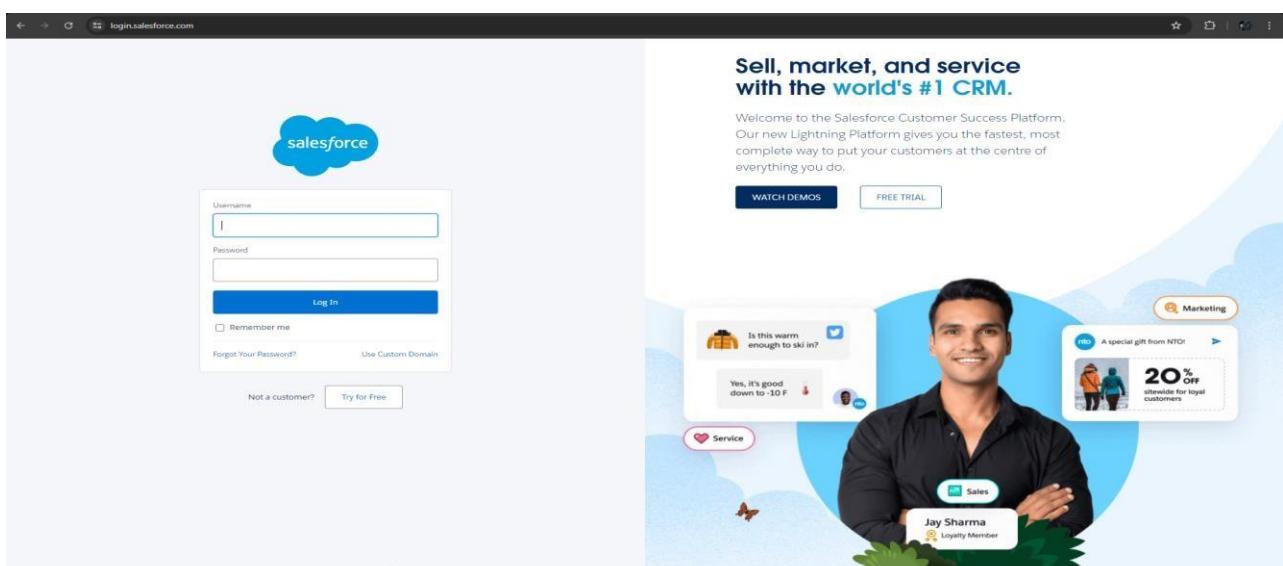
- After Entering the Details proceed with accepting the Terms and Conditions and click on Sign me Up button as shown in above picture.

Step 2: Activation of Developer Org Account.



- After clicking on Sign me Up button it will re-directs to page where it shows that account has created.
- Go to the registered email address inbox that you used while signing up. The activation of account email could take 10-15 minutes to receive to the registered email address.

- Click on the verify account to activate your account.
- Give a password and answer a security question and click on change password.
- Then you will be re-directed to login page to login into Salesforce Developer Org.



Step 3: Create a jotform and integrate it with the org to create a record of customers automatically.

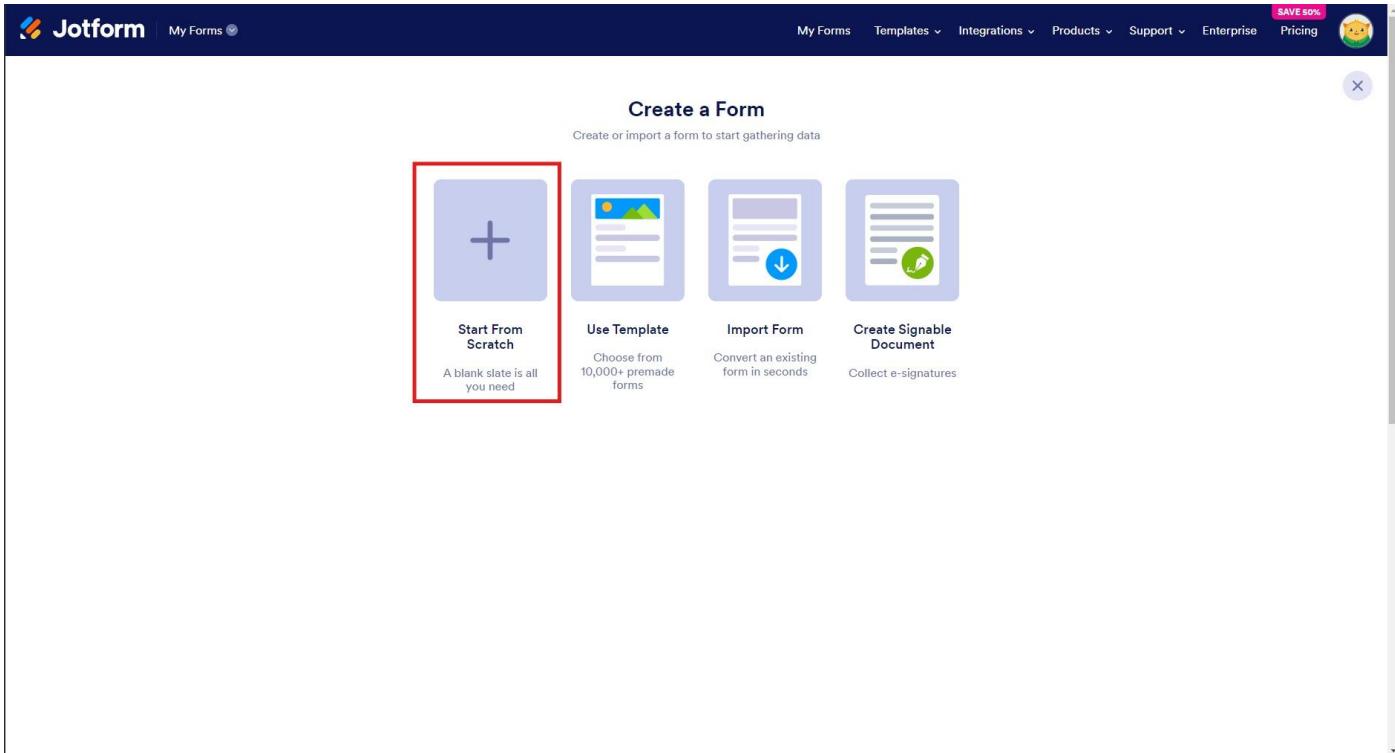
- Go to <https://www.jotform.com/>.

The screenshot shows the Jotform homepage. At the top, there's a navigation bar with links for 'My Forms', 'Templates', 'Integrations', 'Products', 'Support', 'Enterprise', 'Pricing', 'Login', and a prominent orange 'Sign Up for Free' button. Below the navigation, a sub-header reads 'EASIEST ONLINE FORM BUILDER' and a main title 'Powerful forms get it done.' A sub-copy below states: 'We believe the right form makes all the difference. Go from busywork to less work with powerful forms that use conditional logic, accept payments, generate reports, and automate workflows.' There are three illustrations: one of a woman holding a cat, another of a sign-up interface with Google, Microsoft, and email options, and a third of a woman working on a laptop. Below these is a section titled 'See why Jotform is trusted by 25+ million users' featuring logos and ratings from Capterra (4.7), Software Advice (4.6), Product Hunt (4.9), and TrustRadius (4.4).

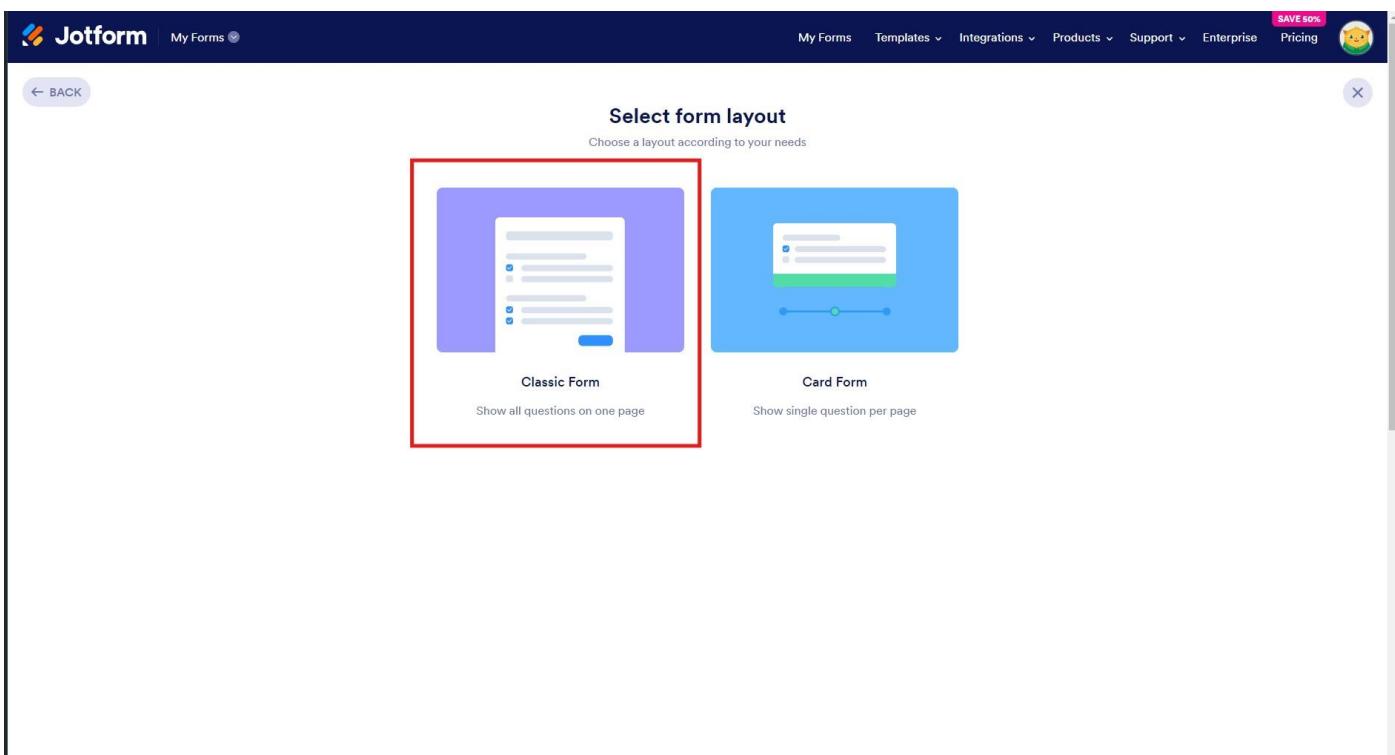
- Create an account using your credentials.
- After creating an account create a form that looks like below picture.

The screenshot shows the 'My Forms' dashboard. On the left, a sidebar lists categories: 'MY FORMS' (with 'All Forms' selected and highlighted in blue), 'MY TEAMS', 'SHARED WITH ME', 'ASSIGNED FORMS', and 'My Drafts'. A red box highlights the 'CREATE FORM' button at the top of the sidebar. The main area displays a single form entry titled 'Dreams World' with a status of '20 Submissions. Last edited on Jun 28, 2024'. Above the main area, there's a banner for 'SUMMER SALE SAVE 50%' and a 'Upgrade now' button. The top navigation bar includes 'My Forms' (which is currently selected and highlighted in red), 'Templates', 'Integrations', 'Products', 'Support', 'Enterprise', 'Pricing', and a user profile icon.

- Click on the “Start from Scratch” button to create a form as shown in the figure below.



- Click on “Classic form” button as shown in the figure below.



- Click on the “Add Form Element” button as shown in the below figure.

The screenshot shows the Jotform Form Builder interface. At the top, there's a navigation bar with the Jotform logo, 'Form Builder', and buttons for 'Add Collaborators', 'Help', and a user profile icon. Below the navigation is a toolbar with 'BUILD', 'SETTINGS', and 'PUBLISH' buttons, and a 'Preview Form' toggle switch. On the left, a sidebar has a red box around the 'Add Form Element' button and a '+' icon. The main area is titled 'Form' and contains a placeholder message: 'Drag your first question here from the left.' A green 'Submit' button is at the bottom. At the bottom of the page, there's a footer with the Jotform logo, a 'Create your own Jotform' button, and a link to 'Now create your own Jotform - It's Free'.

- Drag and drop the required elements to create the Jotform to gather the customer details like name, phone number, address, email address etc.
- Click on the publish button and copy the link to access the form.

This screenshot is similar to the previous one but with the 'Form Elements' sidebar on the left open, indicated by a red border. The sidebar is titled 'Form Elements' and has tabs for 'BASIC', 'PAYMENTS', and 'WIDGETS'. Under 'BASIC', there are icons for Heading, Full Name, Email, Address, Phone, Date Picker, Appointment, Signature, Fill in the Blank, and Product List. Under 'BASIC ELEMENTS', there are icons for Short Text, Long Text, and Paragraph. The rest of the interface is identical to the first screenshot, showing a blank form creation screen with a 'Form' title, a placeholder message, a green 'Submit' button, and a footer with the Jotform logo and links.

The screenshot shows the Jotform Publish page for a form titled "Dreams World". The left sidebar lists sharing options: Quick Share, Embed, Assign Form, Email, Prefill, PDF, and Platforms. The main area features a "SHARE WITH LINK" section with a public link and buttons for "COPY LINK" (highlighted with a red box) and "OPEN IN NEW TAB". It also includes sections for "INVITE BY EMAIL" and "SHARE FORM" with social media sharing options. A "CREATE APP" button is visible at the bottom.

- The below figure is the result of the Jotform after dragging the elements.

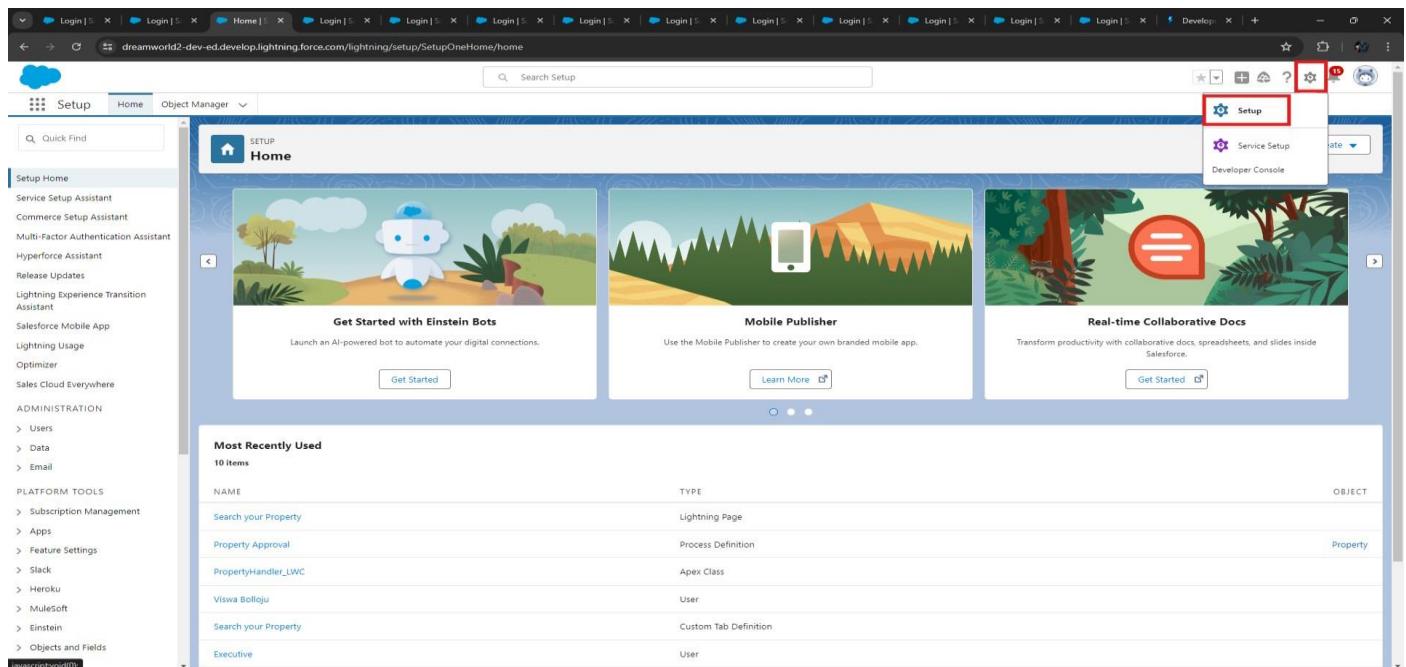
The screenshot shows the final Jotform form titled "Dreams World". It includes fields for Name (First Name and Last Name), Email (example@example.com), Phone Number (0000 000-0000 with validation message), Property Type (radio buttons for Residential, Commercial, or Rental), Budget Amount (e.g., 23), Address (Street Address, Street Address Line 2, City, State / Province, Postal / Zip Code), and a green "Submit" button.

- Here is the reference link for the above Jotform: <https://www.jotform.com/build/243174968049064>

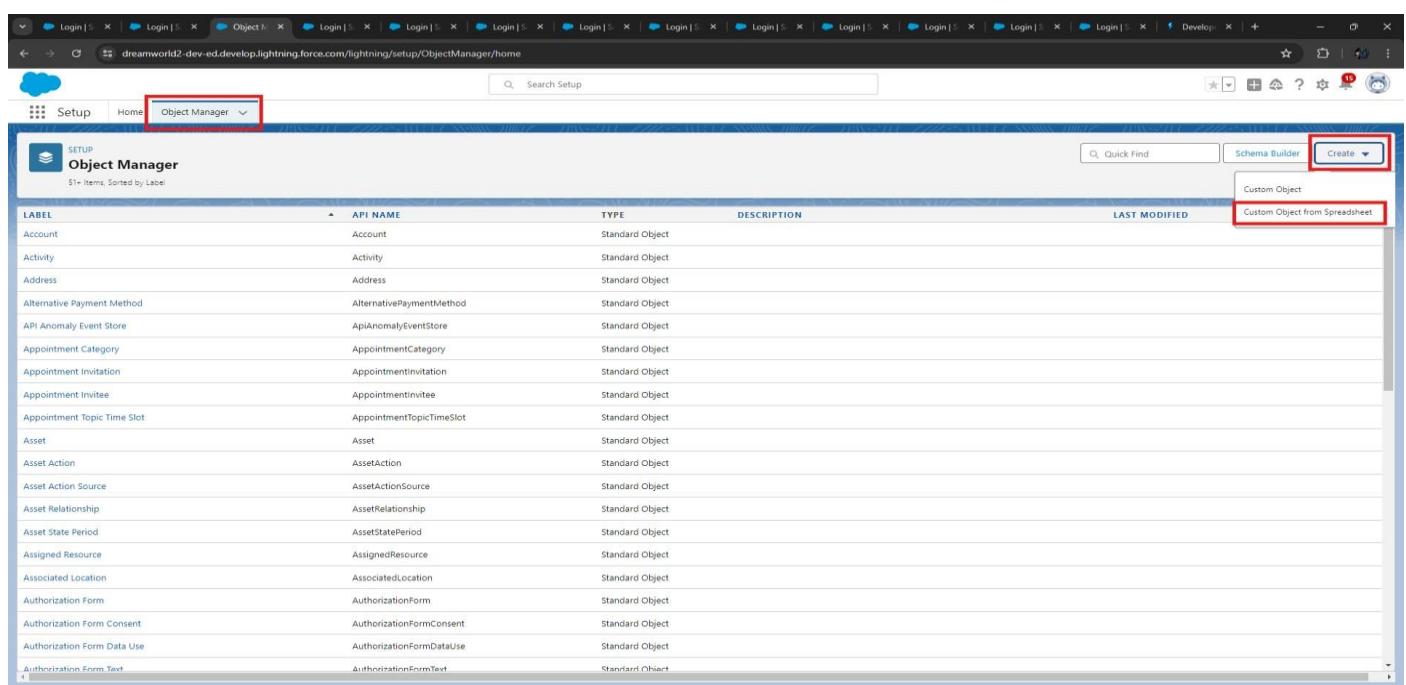
Step 4: Create Objects from Spreadsheet.

A. Creating customer Object.

- I have created **Customer** object using the spreadsheet link: [customer](#).
- After downloading the spreadsheet, go to Salesforce developer Org and login into the account you have created.
- Click on gear icon  and Click on Setup.



- Click on “Object Manager” and click on “Create” and click on “Custom Object from Spreadsheet” as shown in the below figure.



- Click on the “Upload” to upload the customer spreadsheet “customer” you have downloaded.

Create a custom object from a spreadsheet

Select a spreadsheet

Select a source for your new object data.

Upload .xlsx or .csv

Upload

or Drop File Here

Google Sheet

Office 365 or Drive

- Check all the fields that are mapped correctly and click on next.

Note: Do not Change any fields type in the “**Salesforce Field Type**” as it won’t upload all the records from the Spreadsheet. If you do change the field type, then the records won’t upload and leads to manual creation of records after the Object Creation.

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

Worksheet Details

Field Label Source: Detect from row 1

* Field Labels Row: 1

Import 3 rows of Data? Yes, Import data

Record Name Field: Let Salesforce Create a Default Record Name

| IMPORT FILE FIELD NAME | SALESFORCE FIELD NAME | SALESFORCE FIELD TYPE | ADD TO LAYOUTS | FIELD PREVIEW |
|------------------------|-----------------------|-----------------------|-------------------------------------|------------------|
| Customer | Customer | Text | <input checked="" type="checkbox"/> | Rakesh |
| Phone Number | Phone Number | Integer | <input checked="" type="checkbox"/> | 788797 |
| Email | Email | Email | <input checked="" type="checkbox"/> | rakesh@gmail.com |
| State | State | Text | <input checked="" type="checkbox"/> | Telangana |
| Property Type | Property Type | Text | <input checked="" type="checkbox"/> | Residential |
| Budget Amount | Budget Amount | Integer | <input checked="" type="checkbox"/> | 4000000 |
| Street Address | Street Address | Text | <input checked="" type="checkbox"/> | gb road |
| Street Address line 2 | Street Address line 2 | Text | <input checked="" type="checkbox"/> | street no 45 |
| City | City | Text | <input checked="" type="checkbox"/> | Hyderabad |
| postal code | postal code | Text | <input checked="" type="checkbox"/> | 555001 |
| Verified | Verified | Text | <input type="checkbox"/> | checked |

Back Next

- After reviewing the fields that are mapped to salesforce fields click on “**Next**” and review the “**Label**” and “**API Name**”. Click on “**Finish**” to create the “customer” object.

Label: customer

API Name: customer

Create a custom object from a spreadsheet

Object properties

Almost finished! Time to define your object's attributes.

* Label
Customer

* Plural Label
Customer

* API Name ⓘ
Customer

Object Description

> Advanced Settings

Back

Finish

B. Creating Property Object

- In the same way as “customer” Object create the property Object.
- Property Object Spreadsheet: [Property](#). Download the spreadsheet and do the same procedure as the customer object.
- After reviewing the fields that are mapped to salesforce fields click on “Next” and review the “Label” and “API Name”. Click on “Finish” to create the “customer” object.

Label: property

API Name: property

- Do remember the Note while creating the “property” object.

C. Changing the Custom Object Fields type in “customer” and “property” object.

- Click on “Object Manager” and search the for objects you have created.

| Label | API Name | Type | Description | Last Modified | Deployed |
|----------------------------|-------------------------|-----------------|-------------------------|---------------|----------|
| Customer | Customer__c | Custom Object | Dreams World Customers | 28/06/2024 | ✓ |
| Property | Property__c | Custom Object | Dreams World Properties | 28/06/2024 | ✓ |
| Work Type Group Member | WorkTypeGroupMember | Standard Object | | | |
| Work Type Group | WorkTypeGroup | Standard Object | | | |
| Work Type | WorkType | Standard Object | | | |
| Work Step Template | WorkStepTemplate | Standard Object | | | |
| Work Step | WorkStep | Standard Object | | | |
| Work Plan Template Entry | WorkPlanTemplateEntry | Standard Object | | | |
| Work Plan Template | WorkPlanTemplate | Standard Object | | | |
| Work Plan | WorkPlan | Standard Object | | | |
| Work Order Line Item | WorkOrderLineItem | Standard Object | | | |
| Work Order | WorkOrder | Standard Object | | | |
| Web Store Inventory Source | WebStoreInventorySource | Standard Object | | | |
| Store Catalog | WebStoreCatalog | Standard Object | | | |
| Store Buyer Group | WebStoreBuyerGroup | Standard Object | | | |
| Store | WebStore | Standard Object | | | |
| Cart Adjustment Group | WebCartAdjustmentGroup | Standard Object | | | |
| Cart Adjustment Basis | WebCartAdjustmentBasis | Standard Object | | | |
| Cart | WebCart | Standard Object | | | |

- Go to **customer** object and click on “**Fields and Relationships**” and change all the fields to the marked fields as shown in the figure below.

| Fields & Relationships | | | |
|------------------------|--------------------------|--------------------|-------------------|
| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD |
| Budget Amount | Budget_Amount__c | Currency(18, 0) | |
| City | City__c | Text(255) | |
| Created By | CreatedById | Lookup(User) | |
| Customer First Name | Name | Text(80) | |
| Customer Last Name | Customer_Last_Name__c | Text(255) | |
| Email | Email__c | Email | |
| Last Modified By | LastModifiedById | Lookup(User) | |
| Owner | OwnerId | Lookup(User,Group) | |
| Phone Number | Phone_Number__c | Phone | |
| Postal Code | Postal_Code__c | Text(255) | |
| Property Type | Property_Type__c | Picklist | |
| State | State__c | Text(255) | |
| Street Address | Street_Address__c | Text(255) | |
| Street Address line 2 | Street_Address_line_2__c | Text(255) | |
| Verified | Verified__c | Checkbox | |

- In the same way change the field type in **property** object.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' under the 'Property' object. A red box highlights the 'Fields & Relationships' tab in the top navigation and the 'Verified' row in the list below, which contains the 'Verified__c' field information.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Location | Location__c | Text(255) | | |
| Owner | OwnerId | Lookup(User,Group) | | |
| Property | Name | Text(80) | | |
| Property Name | Property_Name__c | Text(255) | | |
| Type | Type__c | Text(255) | | |
| Verified | Verified__c | Checkbox | | |

Step 5: Integrate Jotform with Salesforce Platform.

- Log in to Jotform account and click on “**My Forms**” and click on “**Integrations**” and select “**CRM**” option and click on “**Salesforce**” as shown in the below figure.

The screenshot shows the Jotform My Forms dashboard. The left sidebar includes options like Create Form, My Forms (with All Forms selected), My Teams, Shared With Me, Assigned Forms, My Drafts, Favorites, Archive, and Trash. The top navigation bar has links for My Forms, Templates, Integrations (which is highlighted with a red box), Products, Support, Enterprise, Pricing, and a user profile. The main content area features a 'SUMMER SALE SAVE 50%' banner. Below it, the 'INTEGRATIONS' section is expanded, showing the CRM category (also highlighted with a red box) and a list of integrations including Salesforce (which is also highlighted with a red box). Other listed integrations include Storage, Payment, Email, Hubspot, Zoho CRM, Active Campaign, Pipedrive, Zendesk, Insightly, Keap, and EngageBay.

- Click on “**Use Integration**” and go to “**Add to Form**”.

The screenshot shows the Jotform integration page for Salesforce. On the left, there's a sidebar with categories like Analytics & Reporting, Automation, Blogging, CMS, CRM, Communication, Data Management, E-Signature, E-commerce, Emailing, File Sharing & Storage, GEO & Mapping, Marketing & Sales, Payment Processor, Project Management, SSO, and Social Media. The main area features a diagram showing a Jotform form (Sales Contact Form) connecting to a Salesforce contact record (Bernard Swords). Buttons include 'Watch Video', 'Use Integration' (highlighted with a red box), 'Go to AppExchange', and 'Add to Form'. Below the diagram, text says 'Send new leads, contacts, or accounts to your sales CRM' and describes how Salesforce is a powerful CRM tool. A section titled 'Use this integration to' lists benefits: Add new company leads, Add new contacts, Add new accounts, and Connect any custom object.

- Click on “Select a Form”.

The screenshot shows the Jotform build interface. The title is 'Add the Salesforce integration to a form'. It says 'Send form responses to Salesforce'. There are three options: 'Select a Form' (highlighted with a red box), 'Create a Form', and 'Use Template'.

- Select the form that you have created using “Step - 3”.

The screenshot shows the Jotform interface for selecting a form. At the top, there's a search bar with the placeholder "Search in your forms". Below it is a list of forms, with one named "Dreams World" highlighted by a red border. The "Dreams World" card includes a small icon, the name, the number of submissions (20), and the last modified date (Jun 28, 2024).

- Scroll down and click on “Authentication” and login into Salesforce Developer Org using your credentials and select your account which you want to integrate the Jotform.

The screenshot shows the "INTEGRATIONS" section of the Jotform interface. The "INTEGRATIONS" button is highlighted with a red box. Below it, there's a section titled "Use Jotform without leaving Salesforce" with a "Get the App — It's Free!" button and icons for Google, Facebook, and LinkedIn. The "Salesforce" integration is described as a powerful CRM tool for managing accounts, improving client relations, and closing deals. It mentions automatic sync to Salesforce AppExchange or integration via the handy integration. The "Authentication" section allows selecting a Salesforce account to create an integration, with a dropdown menu highlighted by a red box containing options like "Select a Salesforce account" and "Use another account".

- Select the Options as shown in the below figure and “Select a Salesforce Object” type “Customer” to get customer object.

The screenshot shows the Jotform Form Builder interface. On the left sidebar, the 'INTEGRATIONS' section is highlighted with a red box. The main area displays the 'SALESFORCE' integration configuration. A red box highlights the 'Create a record' action under 'Select an action'. Another red box highlights the 'Customer' object selection under 'Select a Salesforce Object'. At the bottom right of the configuration panel, there is a 'SAVE ACTION' button.

- Map the fields as shown in the figure below and click on “Save Action”.

The screenshot shows the Jotform Form Builder interface with the 'INTEGRATIONS' section highlighted. The main area displays the 'Object Fields' mapping for the 'Customer' object. A large red box highlights the field mappings: Customer First Name to Name - First Name, Customer Last Name to Name - Last Name, Email to Email, Phone Number to Phone Number, Property Type to Which type of Property are ..., Budget Amount to Budget Amount, Street Address to Address - Street Address, Street Address line 2 to Address - Street Address 2, City to Address - City, State to Address - State, and Postal Code to Address - Postal/Zip Code. Below this mapping table, there is a 'Save Action' button highlighted with a red box.

- Click on the “Save Integration” button to Integrate the Jotform into the Salesforce.

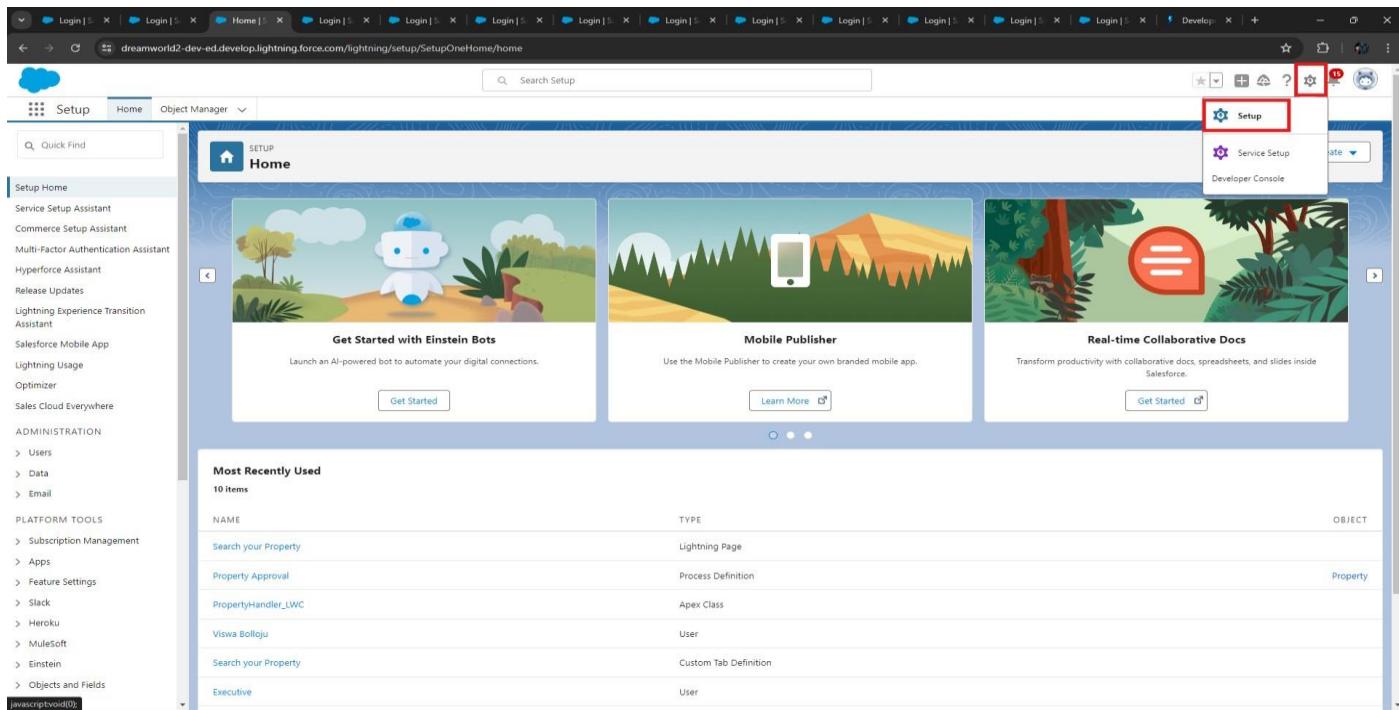
Screenshot of the Jotform Form Builder interface showing the "SALESFORCE" integration setup. The "SALESFORCE" section is selected, displaying an action to "Create a record" under "Customer". A red box highlights the "SAVE INTEGRATION" button.

- Click on “Finish”.

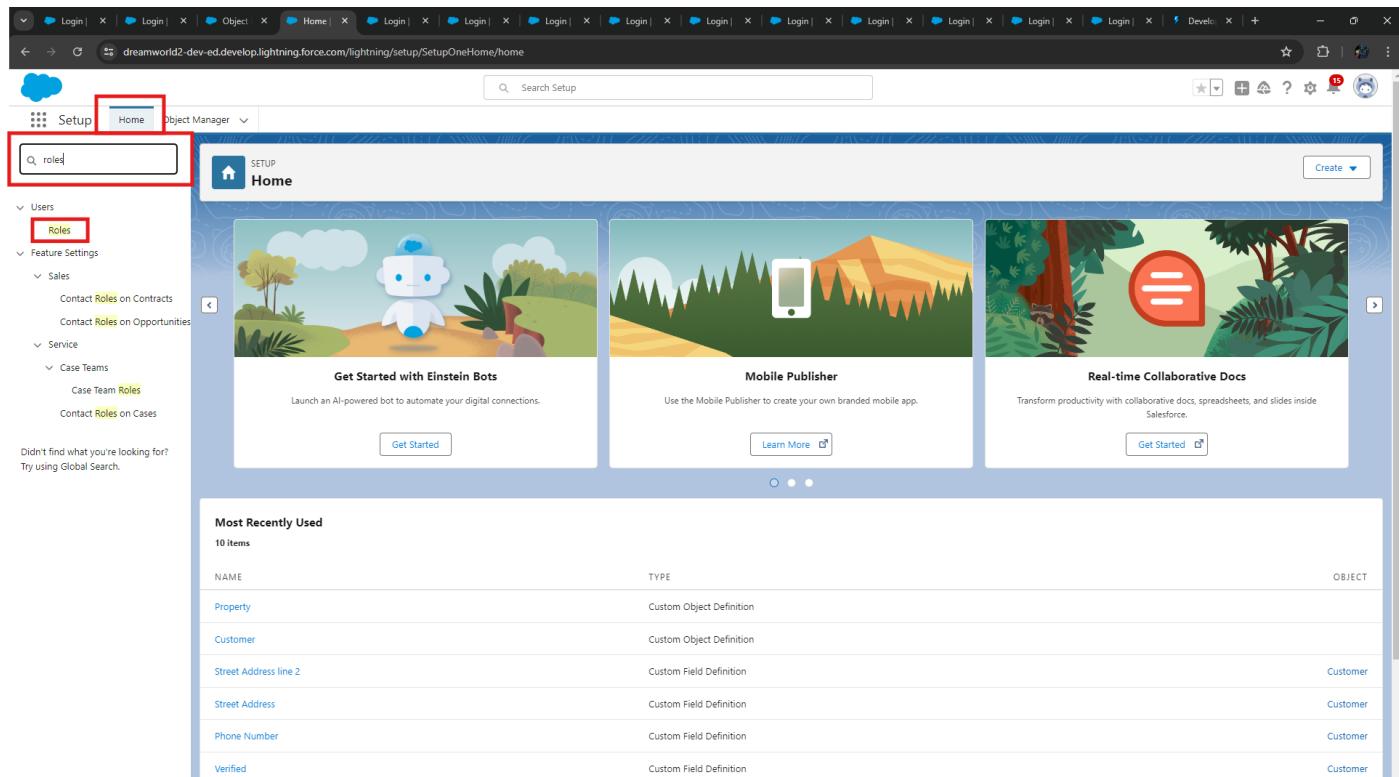
Screenshot of the Jotform Form Builder interface showing the successful creation of the integration. A message states "Integration ready!" and "You have successfully created your integration." A red box highlights the "FINISH" button.

Step 6: Create Roles

- Click on gear icon  and Click on Setup.



- Click on “Home” and search in “quick Find” search box and search for “Roles”.



- Click on “Set Up Roles” as shown in the figure below.

<https://dreamworld2-dev-ed.lightning.force.com/lightning/setup/Roles/home>

- Click on Expand all and Add a Role just below the Sales Representative.

Note: If you don't find “Sales Representative” Role, create on yourself and make sure it has “System Administrator” Profile.

- Click on “Add Role” and enter the details and click on “Save” and create the roles as shown in the figure below.

Label: **Sales Executive** and Reports to: **Sales Representative**.

The screenshot shows the Salesforce Setup Roles page. At the top, there is a blue header bar with the word "SETUP" and a "Roles" icon. Below the header, the page title is "Role Edit" and the sub-section title is "New Role". The main form has the following fields:

- Label:** Sales Executive (text input field)
- Role Name:** Sales Executive (text input field)
- This role reports to:** Sales Representative (text input field with a magnifying glass icon)
- Role Name as displayed on reports:** (empty text input field)

At the bottom right of the form are three buttons: "Save", "Save & New", and "Cancel".

- Similarly Create a Role Name “**Sales Manager**” below **Sales Executive** which reports to **Sales Executive**, Also Add a Role below **Sales Manager** labeled as “**Customer**” which reports to **Sales Manager**.
- The below figure shows result after creating the roles.

The screenshot shows the Salesforce Roles list page. The left sidebar has a search bar and navigation links for "Setup", "Home", and "Object Manager". Under "Users", the "Roles" link is selected. The main content area displays a hierarchical list of roles:

- COO**: Add Role, Edit, Del, Assign
- SVP, Customer Service & Support**: Edit, Del, Assign
 - Customer Support, International**: Edit, Del, Assign
 - Customer Support, North America**: Edit, Del, Assign
 - Installation & Repair Services**: Edit, Del, Assign
- SVP, Human Resources**: Edit, Del, Assign
- SVP, Sales & Marketing**: Edit, Del, Assign
 - VP, International Sales**: Edit, Del, Assign
 - Marketing Team**: Edit, Del, Assign
 - VP, Marketing**: Edit, Del, Assign
 - Marketing Team**: Edit, Del, Assign
- VP, North American Sales**: Add Role, Edit, Del, Assign
 - Director, Channel Sales**: Edit, Del, Assign
 - Channel Sales Team**: Edit, Del, Assign
 - Director, Direct Sales**: Edit, Del, Assign
 - Eastern Sales Team**: Edit, Del, Assign
 - Western Sales Team**: Edit, Del, Assign
- Sales Representative**: Add Role, Edit, Del, Assign
 - Sales Executive**: Edit, Del, Assign
 - Sales Manager**: Edit, Del, Assign
 - Customer**: Edit, Del, Assign

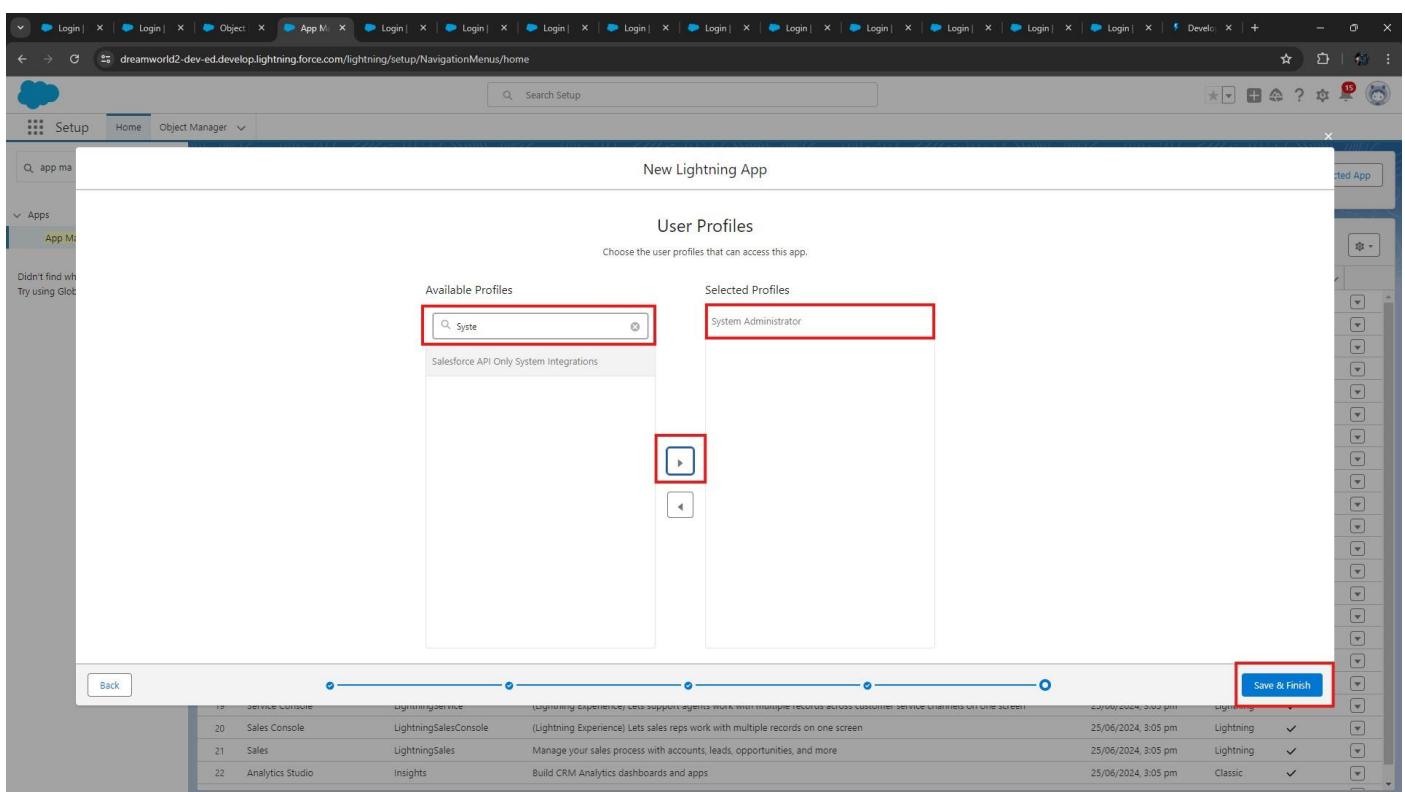
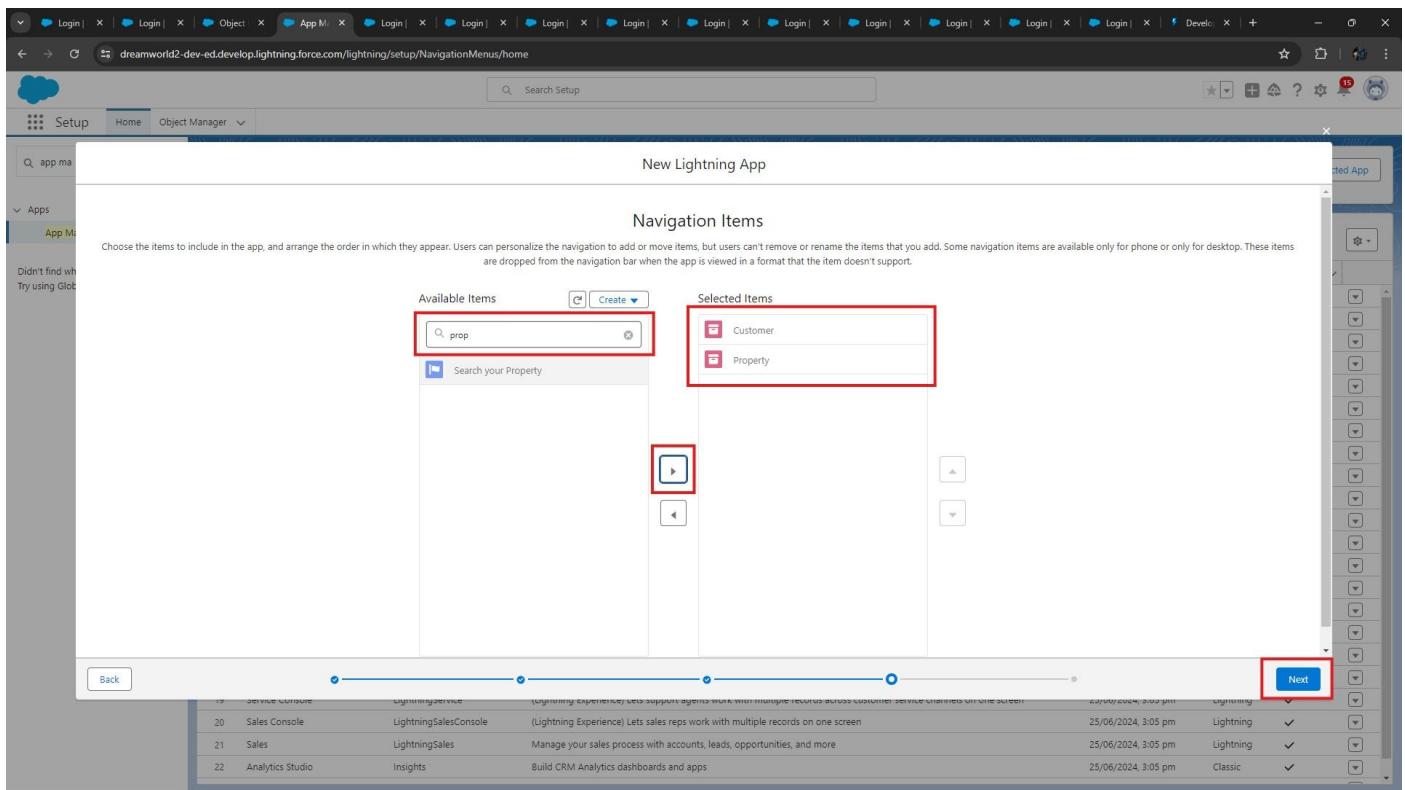
Step 7: Create a Property Details App

- From Setup, go to “App Manager” and click on “New Lightning App” and Name it as “Property Details” and add “Customer” and “Property” Object.

The screenshot shows the Salesforce Setup interface with the 'App Manager' tab selected. In the top right corner, there is a red box highlighting the 'New Lightning App' button. The main area displays a list of existing apps, with the first item, 'Property Details', also highlighted by a red box.

The screenshot shows the 'New Lightning App' configuration page. The 'App Details' section has the 'App Name' field set to 'Property Details', which is highlighted by a red box. The 'App Branding' section shows a placeholder image for 'DreamWorld Properties' and a color hex code '#0070D2' for the primary color. At the bottom right of the configuration page, there is a red box highlighting the 'Next' button.

- Click Next→ Next → and add Navigation items and Save and Add “System Admin” Profile.



- Click on “Save and Finish” to create Lightning App.

The screenshot shows the 'Lightning Experience App Manager' page. A search bar at the top contains 'Q app ma'. Below it, a message says ' Didn't find what you're looking for? Try using Global Search.' On the left, a sidebar has 'App Manager' selected under 'Apps'. The main area displays a table of 23 items, sorted by Last Modified Date. The columns are: App Name, Developer Name, Description, Last Modified Date, App Type, and Visible... (with a dropdown arrow). The first row, 'Property Details', is highlighted with a red border. The developer name is 'Property_Details' and the description is 'DreamsWorld Properties'. The last modified date is '28/06/2024, 11:45 pm', the app type is 'Lightning', and it is visible.

- The above figure shows the result of creating the Lightning App. **Step 8: Create Profiles**

A. Create Customer Profile

- From Setup → Go to “Profiles” and Clone Salesforce Platform User and Name it “Customer”.

The screenshot shows the 'Profiles' page in the 'Setup' section. The search bar at the top contains 'Q pr'. The sidebar on the left has 'Profiles' selected under 'Users'. The main area shows a table of profiles. One profile, 'Customer', is highlighted with a red border. The table columns are: Action, Profile Name, User License, and Custom. The 'Customer' profile has an action 'Edit | Clone' and a profile name 'Customer'. The user license is 'Salesforce Platform'.

The screenshot shows the Salesforce Setup interface with the 'Profiles' section selected. On the left, a sidebar lists various setup categories like Users, Data, Feature Settings, Marketing, Sales, and Products. The 'Profiles' section is highlighted. In the main content area, a 'Clone Profile' screen is displayed. It asks for the name of the new profile ('Customer') and provides options to clone from an existing profile or use a standard platform user. A red box highlights the 'Profile Name' input field and the 'Save' button.

- Uncheck all the **Custom Objects** and Check only **Property Details** from Custom App Settings.

The screenshot shows the 'Profile Edit' screen for the 'Customer' profile. It allows setting permissions and page layouts for the profile. The 'Custom App Settings' section is highlighted with a red box. Under 'Custom App Settings', there are two tabs: 'Analytics Studio (standard__Insights)' and 'Property Details (Property_Details)'. The 'Property Details (Property_Details)' tab is selected, indicated by a red box around its radio button. Other settings like 'Tab Settings' and 'Service Provider Access' are also visible.

- Also Remove all the **Standard Object Permissions**.
- Uncheck all the **Custom Object Permissions** and check **read** and **view all** in “**Property**”

The screenshot shows the Salesforce Setup interface under the Profiles section. It displays two main sections: Standard Object Permissions and Custom Object Permissions.

Standard Object Permissions: This section lists various standard objects like Accounts, Contacts, and Opportunities. Under each object, there are two tables: Basic Access and Data Administration. The 'Property' object is highlighted with a red box around its permission rows.

Custom Object Permissions: This section shows permissions for a custom object named 'Property'. It also has two tables: Basic Access and Data Administration. The 'Property' object is highlighted with a red box around its permission rows.

- Click on “Save”.

This screenshot shows the same Profiles page after the changes have been saved. The 'Property' object's permission rows are now highlighted with a red box. The 'Basic Access' checkboxes for Read, Create, Edit, and Delete are now unchecked, while 'View All' and 'Modify All' remain checked.

B. Create Manager Profile

- From Setup → Go to **Profiles** and Clone Salesforce Platform User and Name it “**Manager**”.
- Uncheck all the **Custom Objects** and Check only “**Property Details**” from Custom App Settings.

The screenshot shows the 'Profiles' section of the Salesforce Setup. The 'Manager' profile is being edited. In the 'Custom App Settings' section, the 'Visible' dropdown for the 'Property Details (Property__Details)' tab is highlighted with a red box and has its radio button selected, indicating 'Default On'.

- Make sure custom tab settings are “Default on” for both “Customer” & “Property”.

The screenshot shows the 'Profiles' section of the Salesforce Setup. In the 'Custom Tab Settings' section, the 'Customer' and 'Property' dropdowns are highlighted with red boxes and set to 'Default On'. The 'Property' dropdown is also specifically highlighted with a red box.

- Also Remove all the Standard Object Permissions.
- Uncheck all the Custom Object Permissions and check only “modify all” from “Property” and “Customer”.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar is expanded to show 'Profiles' under 'Users'. The main content area displays 'Standard Object Permissions' and 'Custom Object Permissions' tables. The 'Customer' object in the custom permissions section has all checkboxes checked under 'Basic Access' and 'Data Administration'.

- Scroll down and click on “Save”.

Step 9: Create a CheckBox field on user

- Setup → Object Manager → Search for “User” → Fields and Relationships.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' page selected. The 'Object Manager' tab is highlighted in the top navigation bar. A search bar at the top right contains the text 'User'. The main table lists objects: Guest User Anomaly Event Store, Messaging User, User (which is highlighted with a red border), and User Provisioning Request.

- Click on “New” to create a new Field.

| Fields & Relationships | | | | | |
|---------------------------|--|-----------------------------------|---------------------|-------------------|---------|
| | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| User Page Layouts | About Me | AboutMe | Text Area(1000) | | |
| User Profile Page Layouts | Active | IsActive | Checkbox | | |
| Lightning Record Pages | Address | Address | Address | | |
| Buttons and Links | Admin Info Emails | ReceivesAdminInfoEmails | Checkbox | | |
| Compact Layouts | Alias | Alias | Text(8) | | |
| Field Sets | Allow Forecasting | ForecastEnabled | Checkbox | | |
| Object Limits | Banner Photo | BannerPhotoId | Lookup(Photo) | | |
| Related Lookup Filters | Call Center | CallCenterId | Lookup(Call Center) | | |
| Search Layouts | Chatter Email Highlights Frequency | DigestFrequency | Picklist | | |
| List View Button Layout | Company Name | CompanyName | Text(80) | | |
| Triggers | Contact | ContactId | Lookup(Contact) | | |
| Flow Triggers | Data.com Monthly Addition Limit | JigswinImportLimitOverride | Number(9, 0) | | |
| Validation Rules | Default Notification Frequency when Joining Groups | DefaultGroupNotificationFrequency | Picklist | | |
| | Delegated Approver | DelegatedApproverId | Lookup(User,Group) | | |
| | Department | Department | Text(80) | | |
| | Division | Division | Text(80) | | |
| | Email Encoding | EmailEncodingKey | Picklist | | |
| | Email Sender Address | SenderEmail | Email | | |
| | Email Sender Name | SenderName | Text(80) | | |

- Create new Field Named as “Verified” as Data type “CheckBox”.

New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Hierarchical Relationship Allows users to click a lookup icon and select another user from a pop-up list.

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date Allows users to enter a date or pick a date from a pop-up calendar.

Date/Time Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number Allows users to enter any number. Leading zeros are removed.

Percent Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Phone Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist Allows users to select a value from a list you define.

Picklist (Multi-Select) Allows users to select multiple values from a list you define.

Text Allows users to enter any combination of letters and numbers.

Text Area Allows users to enter up to 255 characters on separate lines.

Step 1

Next **Cancel**

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Fields & Relationships' under 'User'. The main area is titled 'New Custom Field' and is on 'Step 2 of 4'. The field 'Field Label' is set to 'Verified'. The 'Default Value' section has 'Checked' selected. The 'Field Name' is also 'Verified'. There are 'Description' and 'Help Text' fields, both currently empty. At the bottom, there are checkboxes for 'Auto add to custom report type' and 'Add this field to existing custom report types that contain this entity'. The 'Next' button is highlighted with a red box.

- After clicking “Next”, Select “Visible” Option and click on “Next” and “Next” and “Save”.

The screenshot shows the Salesforce Setup interface for establishing field-level security. The left sidebar is the same as the previous step. The main area is titled 'Step 3. Establish field-level security' and is on 'Step 3 of 4'. It lists various user profiles and勾选s the 'Visible' checkbox for each. The 'Visible' checkbox is highlighted with a red box. The 'Read-Only' checkbox is also present but unselected. The 'Next' button is highlighted with a red box.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The page title is "User New Custom Field". The left sidebar shows the "Fields & Relationships" tab is selected. The main form has the following details:

- Field Label:** Verified
- Data Type:** Checkbox
- Field Name:** Verified
- Description:** (empty)

Below the field details, there is a note: "Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout." A list of page layouts is provided with checkboxes:

- Add Field Page Layout
- Community Member Layout
- User Layout

At the bottom right of the form, there are buttons: "Previous", "Save & New", "Save" (which is highlighted with a red box), and "Cancel".

Step 10: Create Users

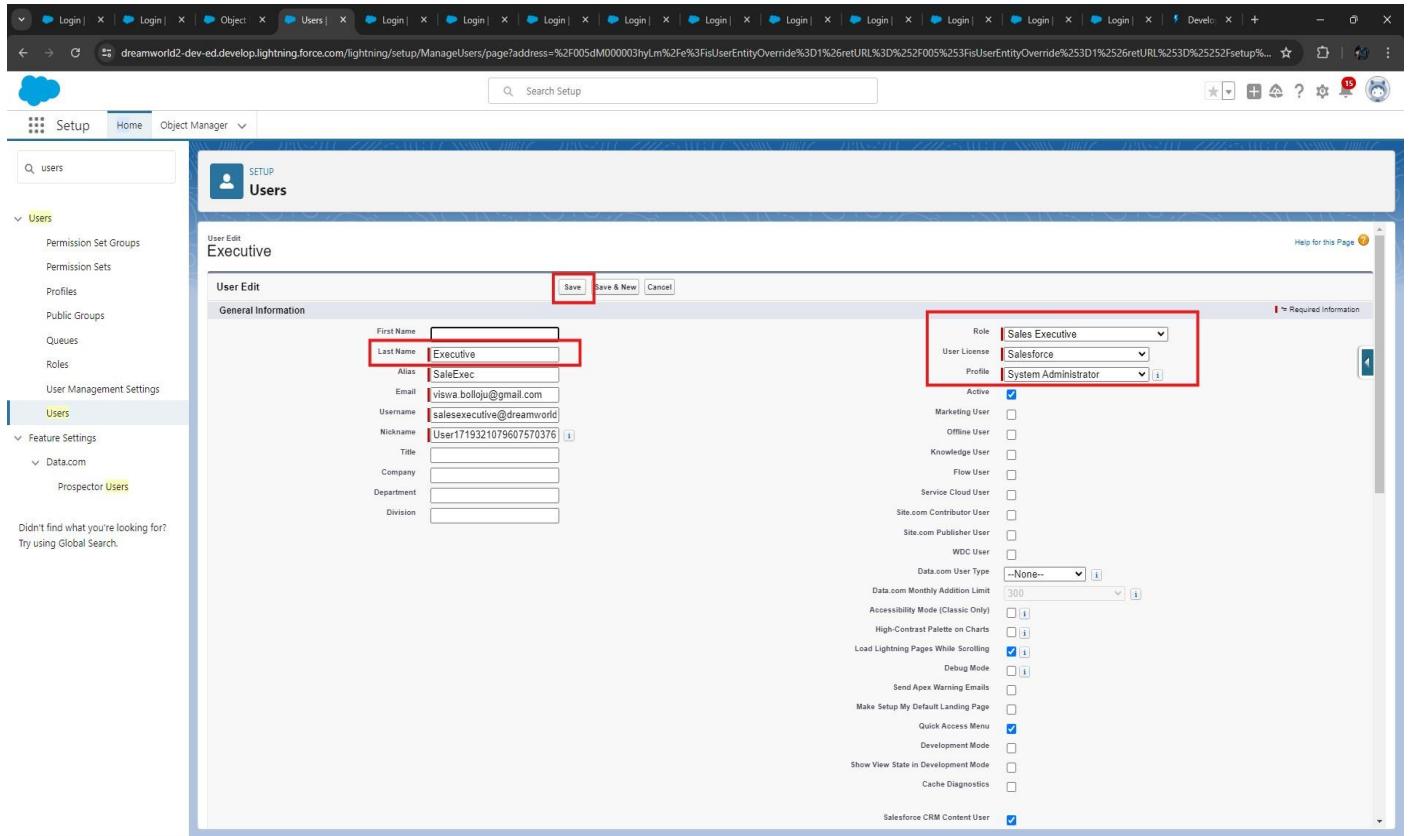
- Create three different users with three different Roles and profiles as we have mentioned above.
 - **User 1:** -
 1. Go to Setup → Quick Find “Search box” → Users → New User
 2. LastName – **Executive**
 3. Role - **Sales Executive**
 4. License – **Salesforce**
 5. Profile - **System Administrator**
 6. Save
- To create a “User”, click on “New”.

The screenshot shows the Salesforce Setup Home page. The left sidebar is collapsed, and the main area displays the 'Users' section under 'All Users'. A red box highlights the 'New User' button at the top of the user list table. The URL in the browser is dreamworld2-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home.

- Fill in the details of “User 1”.

The screenshot shows the 'User Edit' page for a user named 'Executive'. The 'Last Name' field is set to 'Executive'. The 'Role' dropdown is set to 'Sales Executive', 'User License' to 'Salesforce', and 'Profile' to 'System Administrator'. A red box highlights the 'Save' button at the top right of the form. The URL in the browser is [dreamworld2-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005dM000003hyLm%2F%3Fu\\$UserEntityOverride%3D1%26retURL%3D%252F005%253Fu\\$UserEntityOverride%253D1%2526retURL%253D%2525fsetup%...](https://dreamworld2-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005dM000003hyLm%2F%3Fu$UserEntityOverride%3D1%26retURL%3D%252F005%253Fu$UserEntityOverride%253D1%2526retURL%253D%2525fsetup%...).

- Click on “Save”.



- Do the same with **User 2, User 3, User 4** ○ **User 2:** -

1. Go to Setup → Quick Find “**Search box**” → Users → New User
2. LastName - **Manager**
3. Role - **Sales Manager**
4. License - **Salesforce Platform**
5. Profile - **Manager**
6. Save ○ **User 3:** -
 1. Go to Setup → Quick Find “**Search box**” → Users → New User
 2. LastName - **Customer**
 3. Role - **Customer**
 4. License - **Salesforce Platform**
 5. Profile - **Customer**
 6. Make Sure the verified check box is “**Unchecked**”.

The screenshot shows the Salesforce Setup interface for managing users. A new user record is being created for 'Customer'. Key fields include:

- Name:** Customer
- Email:** vivek.bolaji@gmail.com (with a **Verified** checkbox checked)
- Role:** Customer
- User License:** Salesforce Platform Customer
- Active:** Checked
- Mobile Push Registrations:** Verified
- Last Password Change or Reset:** 25.05.2024, 8 AM

7. Save ○ User 4: -

1. Go to Setup → Quick Find “Search box” → Users → New User
2. LastName - **Customer2**
3. Role - **Customer**
4. License - **Salesforce Platform**
5. Profile - **Customer**
6. Make Sure the verified check box is “**checked**”.

The screenshot shows the Salesforce Setup interface under the 'Users' section. A new user record is being created with the following details:

- Name:** Customer2
- Alias:** cust2
- Email:** vivek.bolla@gmail.com [Verified]
- Username:** customer2@dreamworld.com
- Nickname:** User1719321513746857465
- Title:** Manager
- Company:** Site.com
- Department:** Sales
- Address:** 123 Main Street, Anytown, USA
- Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Delegated Approver:** Manager
- Receive Approval Request Emails:** Only if I am an approver
- Federation ID:** (Blank)
- App Registration:** One-Time Password Authentication (Blank)
- App Registration:** Salesforce Authentication (Blank)
- Security Key (2FA or WebAuthn):** (Blank)
- Lightning Login:** (Blank)
- Temporary Verification Code (Expires in 1 to 24 Hours):** (Generate)

On the right side, the user's profile is set to 'Customer' and various permissions are listed. The 'Verified' checkbox at the bottom is checked.

7. Save

- Result after creating the Users

The screenshot shows the Salesforce Setup interface under the 'Users' section. The 'All Users' page lists the following users:

| Action | Full Name | Alias | Username | Role | Active | Profile |
|--------------------------|-----------------|-------------|---|----------------------------------|-------------------------------------|----------------------|
| <input type="checkbox"/> | Bolaji, Vivek | VBolaji | projectbproperties@dreamworld.com | Sales Representative | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | Chatter, Enrich | Chatter | chatty_00dm000005enrich@x梦云u@chatter.salesforce.com | Chatter Free User | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Edit Log in | Customer | customer@dreamworld.com | Customer | <input checked="" type="checkbox"/> | Customer |
| <input type="checkbox"/> | Edit Log in | Customer2 | customer2@dreamworld.com | Customer | <input checked="" type="checkbox"/> | Customer |
| <input type="checkbox"/> | Edit Log in | Executive | salesexecutive@dreamworld.com | Sales Executive | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | Edit Log in | Manager | salesmanager@dreamworld.com | Sales Manager | <input checked="" type="checkbox"/> | Manager |
| <input type="checkbox"/> | Edit Log in | Integration | integration_00dm000005enrich@u.com | Analytics Cloud Integration User | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Edit Log in | Security | insightssecurity_00dm000005enrich@u.com | Analytics Cloud Security User | <input checked="" type="checkbox"/> | |

The 'Users' section in the sidebar is highlighted with a red box.

Step 11: Create an Approval Process for Property Object

- From Setup → Process Automation → Approval Process.

The screenshot shows the Salesforce Setup interface. The top navigation bar has tabs like 'Login', 'Object', 'Approv', 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup'. The main area is titled 'Approval Processes' with a 'Property' subtitle. It includes a help section with steps for creating approvals, a dropdown for managing processes for 'Property', and a list of active and inactive approval processes. A red box highlights the 'Manage Approval Processes For' dropdown set to 'Property' and another red box highlights the 'Use Standard Setup Wizard' button.

- Select “Property” and Choose “Use Standard Setup Wizard”.
- Enter Process Name – “Property Approval”.

The screenshot shows the 'Step 1. Enter Name and Description' page of the approval process wizard. The process name is 'Property Approval'. The 'Next' button is highlighted with a red box. The page also includes fields for Unique Name ('Property_Approval') and Description, along with save and cancel buttons.

- Give 2 criteria →

- 1) Location is not equal to blank, 2)

Verified Equals false.

The screenshot shows the 'Approval Process Edit' page for 'Property Approval'. It's on 'Step 2. Specify Entry Criteria' of a 6-step process. The logic is set to 'Use this approval process if the following criteria are met'. The criteria are:

- Property: Location not equal to blank
- Property: Verified equals False
- None
- None
- None

The first two criteria are highlighted with a red box. The 'Next' button at the bottom right is also highlighted with a red box.

- Click next and “Next Automated Approver Determined By” → Select “Manager”.
- From Record Editability Properties → Click on Administrators OR the currently assigned approver can edit records during the approval process.

The screenshot shows the 'Approval Process Edit' page for 'Property Approval'. It's on 'Step 3. Specify Approver Field and Record Editability Properties' of a 6-step process. Under 'Select Field Used for Automated Approval Routing', 'Next Automated Approver Determined By' is set to 'Manager'. Under 'Record Editability Properties', the option 'Administrators OR the currently assigned approver can edit records during the approval process' is selected. The 'Next' button at the bottom right is highlighted with a red box.

- From Step 5. Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type and click Next.

Step 5 of 6

Step 5. Select Fields to Display on Approval Page Layout

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

Available Fields: Created By, Last Modified By, Property Name, Verified

Selected Fields: Property, Owner, Location, Type

Click here to view an example

Approval Page Fields

Display approval history information in addition to the fields selected above.

Security Settings

Allow approvers to access the approval page only from within the Salesforce application. (Recommended)

Allow approvers to access the approval page from within the Salesforce application, or externally from a wireless-enabled mobile device.

Previous Save Next Cancel

- Click Next and Select the **initial Submitters** →
 - 1) Owner → **Property Owner**
 - 2) Roles → **Sales Manager** • Click on “Save”.

Step 6 of 6

Step 6. Specify Initial Submitters

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

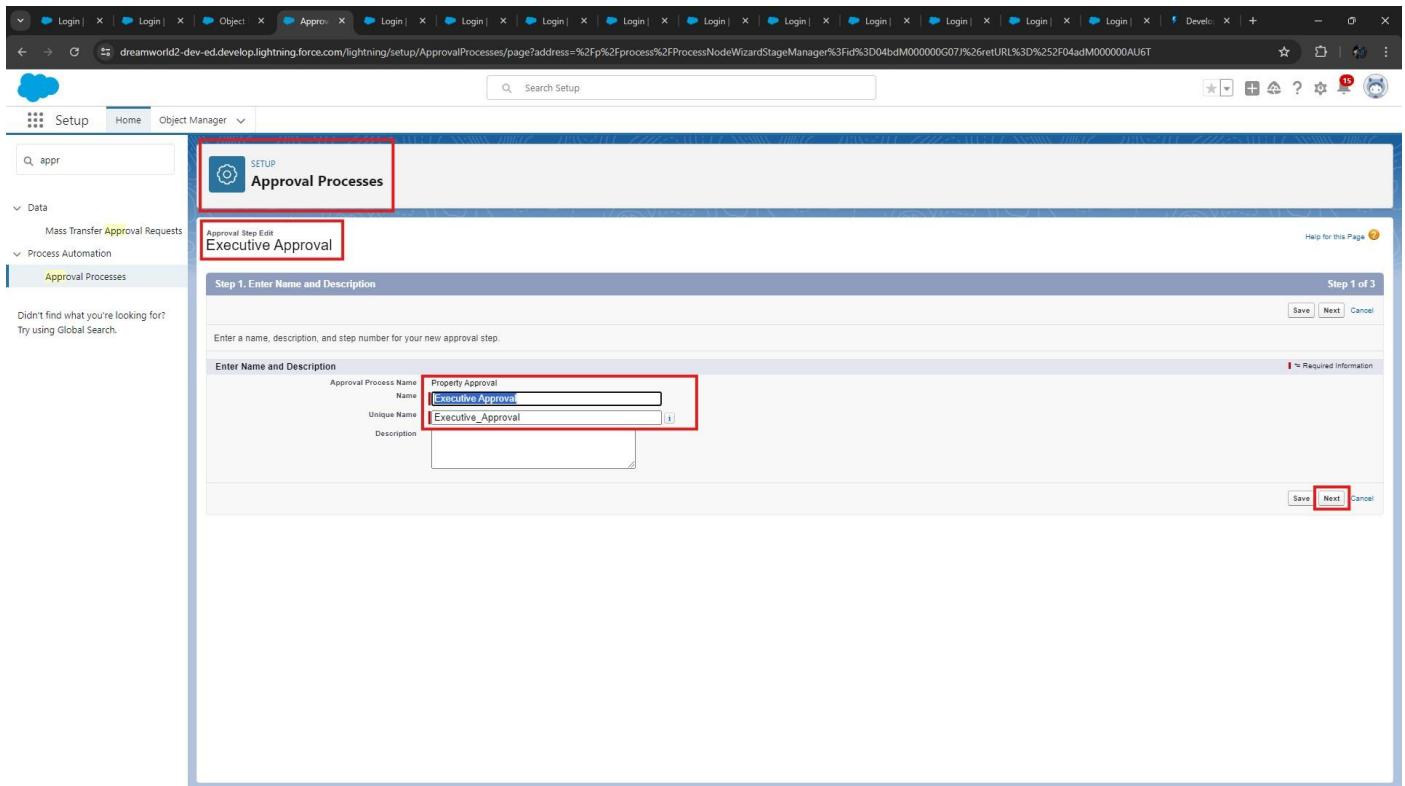
Available Submitters: Role: CEO, Role: COO, Role: COO, Role: Channel Sales Team, Role: Customer, Role: Customer Support, International, Role: Customer Support, North America, Role: Director, Channel Sales, Role: Director, Global Sales, Role: Director, Sales Team, Role: Installation & Repair Services, Role: Marketing Team, Role: SVP, Customer Service & Support, Role: SVP, Human Resources

Allowed Submitters: Role: Sales Manager, Property Owner

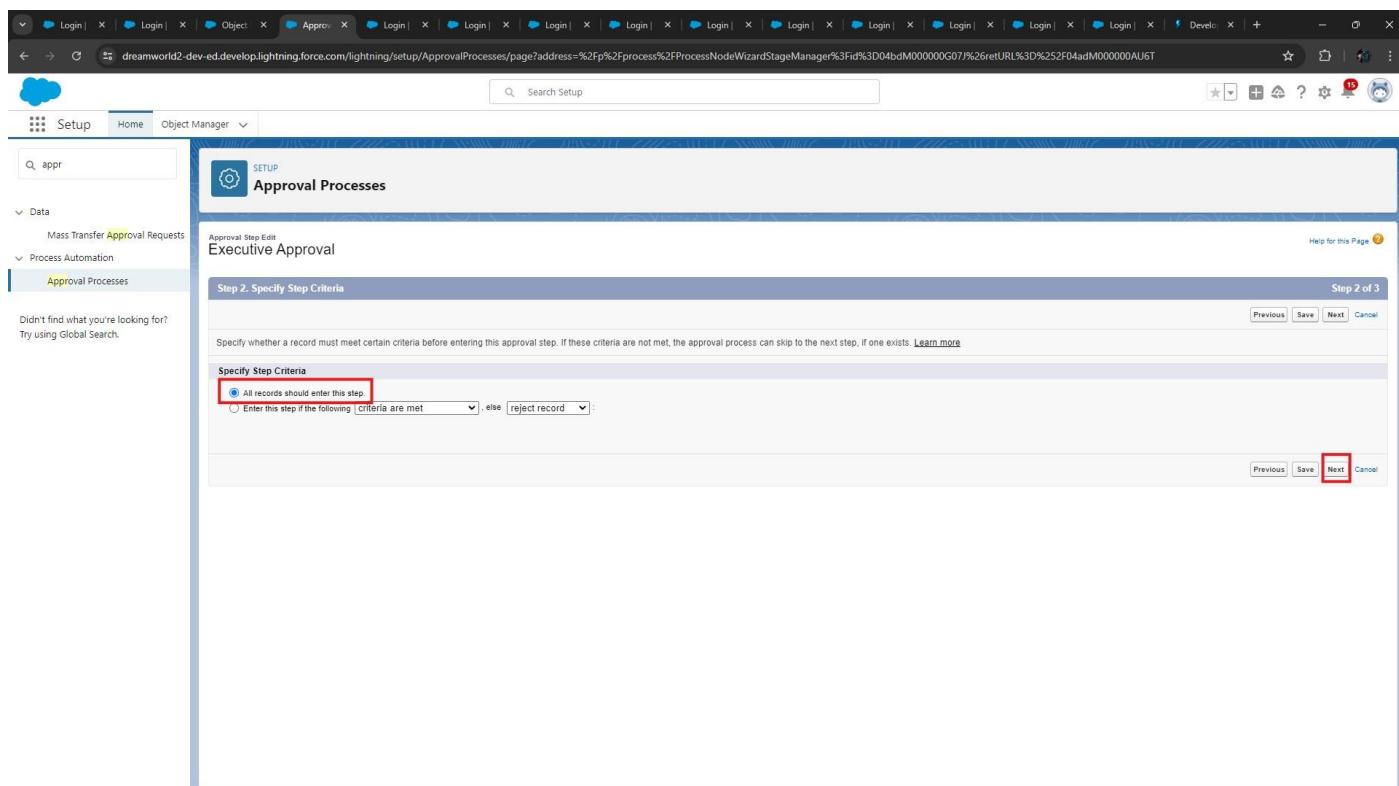
Submission Settings

Allow submitters to recall approval requests

Previous Save Cancel



- Add an approval step name “Executive Approval”.
- Specify the Criteria → All record should enter



- Click next and select the Approver as “Sales Executive” and “Save”

The screenshot shows the 'Approval Processes' setup page. The current step is 'Step 3. Select Assigned Approver'. It asks to specify the user who should approve records. There are three options: 'Let the submitter choose the approver manually', 'Automatically assign using the user field selected earlier (Manager)', and 'Automatically assign to queue'. The third option is selected, and a dropdown menu shows 'User' with 'Executive' highlighted. A red box surrounds this selection. Below the dropdown, there are two radio button options: 'Approve or reject based on the FIRST response' (selected) and 'Require UNANIMOUS approval from all selected approvers'. At the bottom right, there are 'Previous', 'Save', and 'Cancel' buttons, with 'Save' highlighted by a red box.

- Click on “Add New” and click on “Field Update”.

The screenshot shows the 'Approval Processes' setup page. In the 'Initial Submission Actions' section, there is a 'Record Lock' action with a 'Description' of 'Lock the record'. To its right, there is a 'Field Update' action with a 'Description' of 'Outbound Message'. A red box highlights the 'Field Update' action. Below this, there are sections for 'Approval Steps', 'Final Approval Actions', and 'Final Rejection Actions', each with their own 'Add Existing' and 'Add New' buttons. At the bottom, there is a 'Recall Actions' section with similar buttons.

- Add One field Update as “Verified Property”

- Select Object → Property

- 2) Field to Update → **Verified**
- 3) Field Data Type → **CheckBox**
- 4) Select CheckBox Option as “**True**” 5) Save.

The screenshot shows the Salesforce Setup interface with the 'Field Updates' page open. A field update named 'Verified Property' is being edited. The 'Object' dropdown is set to 'Property'. The 'Field to Update' dropdown is set to 'Verified'. The 'Field Data Type' dropdown is set to 'CheckBox'. Under 'Specify New Field Value', the 'Checkbox Options' section shows 'True' selected. The 'Save' button at the bottom is highlighted with a red box.

- Add One field Update as “**UnVerified Property**”

 - 1) Select Object → **Property**
 - 2) Field to Update → **Verified**
 - 3) Field Data Type → **CheckBox**
 - 4) Select CheckBox Option as “**False**”
 - 5) Save.

The screenshot shows the 'Field Updates' page in the Salesforce Setup. A new field update is being created with the following details:

- Name:** UnVerified_Property
- Object:** Property
- Field to Update:** Property: Verified
- Field Data Type:** Checkbox
- Value:** False (selected in the checkbox options)
- Buttons:** Save, Save & New, Cancel

- Activate the Approval Process and below picture shows the result.

The screenshot shows the 'Approval Processes' page in the Salesforce Setup. An approval process named 'Property Approval' is being configured with the following details:

- Process Name:** Property Approval
- Entry Criteria:** (Property: Location NOTEQUALTO null) AND (Property: Verified EQUALS False)
- Initial Submitters:** Role_Sales Manager, Property Owner
- Approval Steps:**
 - Action:** Executive Approval (Type: Approval Actions, Description: Verified_Property, Assigned Approver: User_Executive)
 - Action:** Rejection Actions (Type: Field Update, Description: UnVerified_Property)
- Final Approval Actions:** Record Lock (Type: Record Lock, Description: Lock the record from being edited)

Step 12: Create a Record trigger flow to submit the Approval Process Automatically.

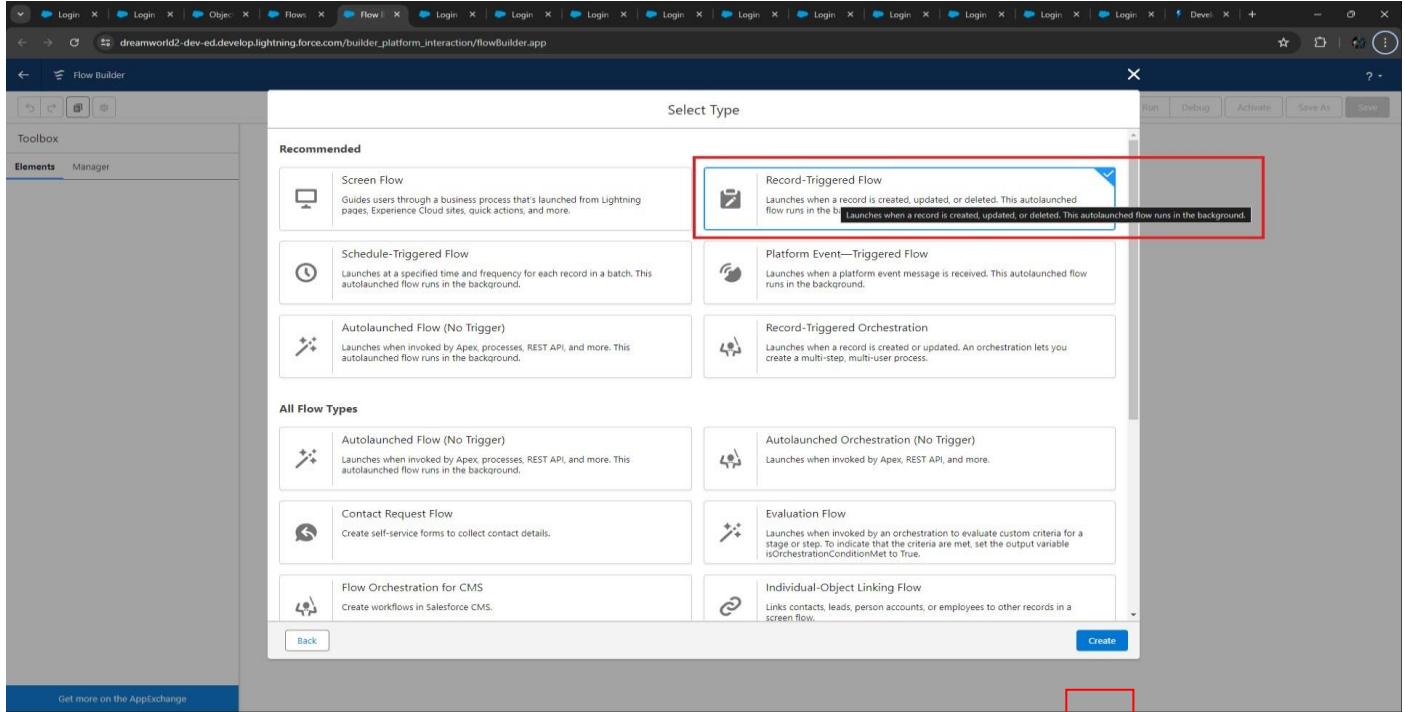
- From Setup → Search for Flows → Click on New and Select “Start From Scratch”.

The screenshot shows the Salesforce Setup interface for the 'Flows' section. A red box highlights the 'Flows' search bar. Another red box highlights the 'Flows' button in the top navigation bar. A third red box highlights the 'New Flow' button in the top right corner. Below the navigation, there's a 'Try the Automation Lightning App!' section with a note about new features available only in the app. The main area shows a table of 'Flow Definitions' with 42 items. The columns include Flow Label, Process Type, Active, Template, Package State, Package Name, Last Modified By, and Last Modified Date. The table lists various flows such as 'Property Approval', 'Basic Approval Request', and 'CMS: Withdraw Review Request'. The URL in the address bar is <https://dreamworld2-dev-ed.lightning.force.com/lightning/setup/Flows/home>.

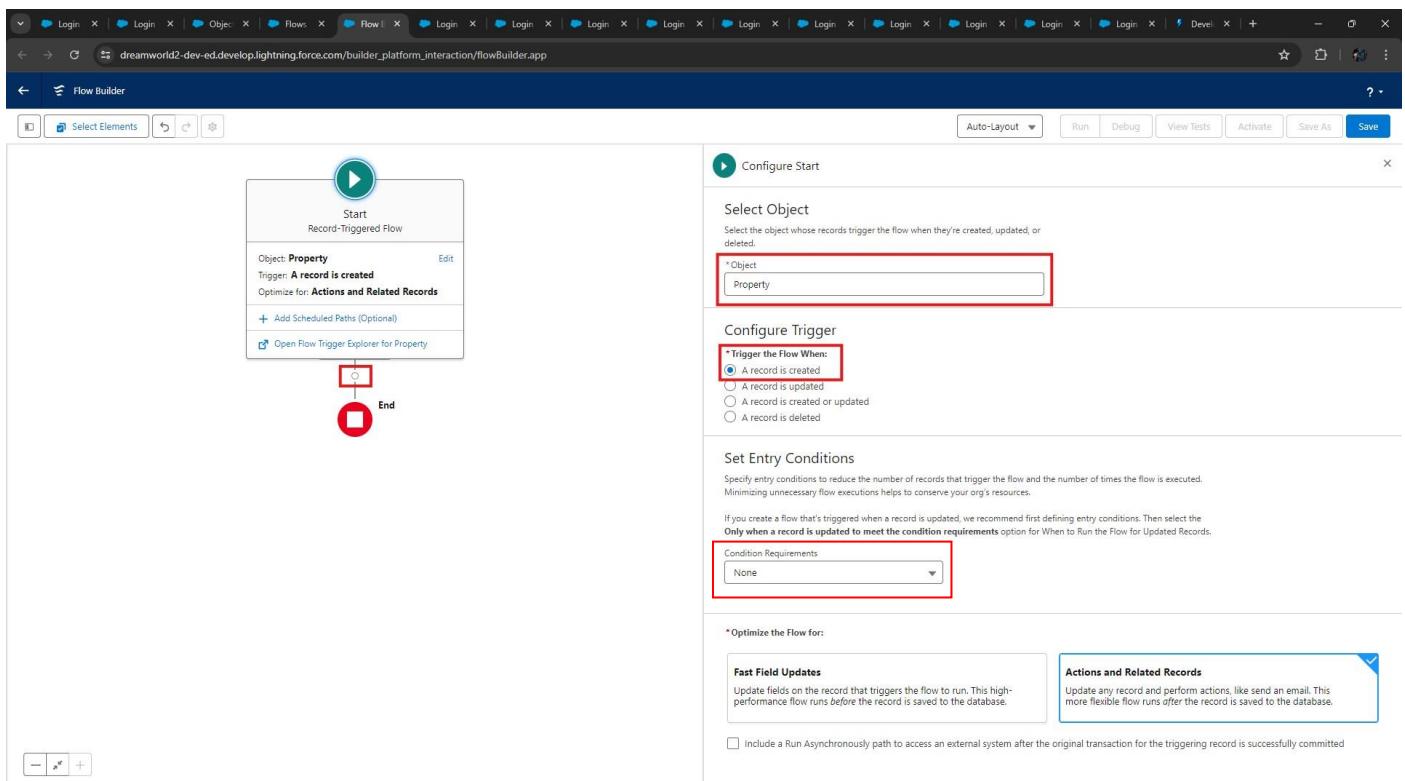
- Click on next.

The screenshot shows the 'Flow Builder' interface with a 'New Flow' dialog box open. A red box highlights the 'Start From Scratch' option under 'Select how you'd like to start building your automation.' Another red box highlights the 'Next' button at the bottom right of the dialog. The background shows the 'Toolbox' and 'Elements Manager' panels. The URL in the address bar is https://dreamworld2-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app.

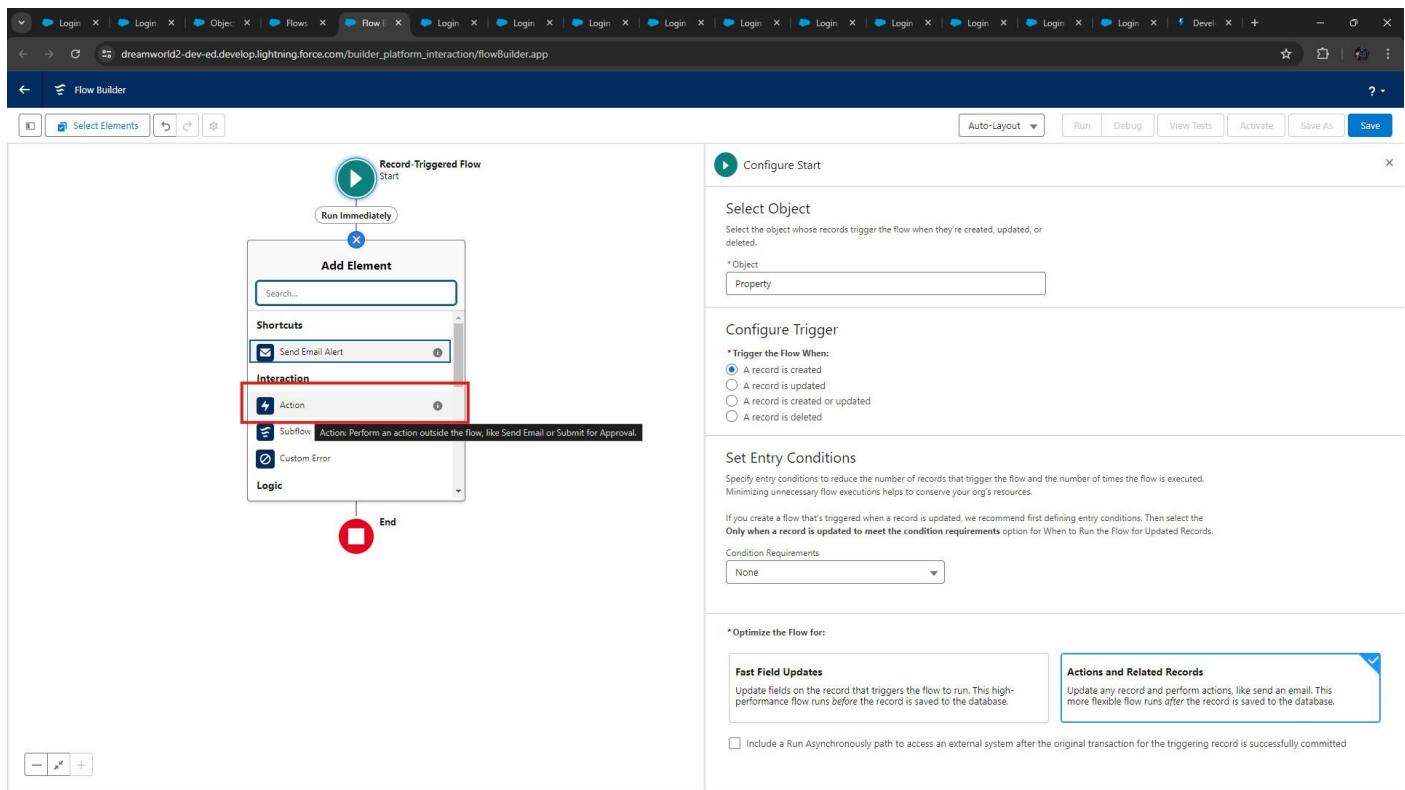
- Click on “Record-Triggered Flow” and click on “Create”.



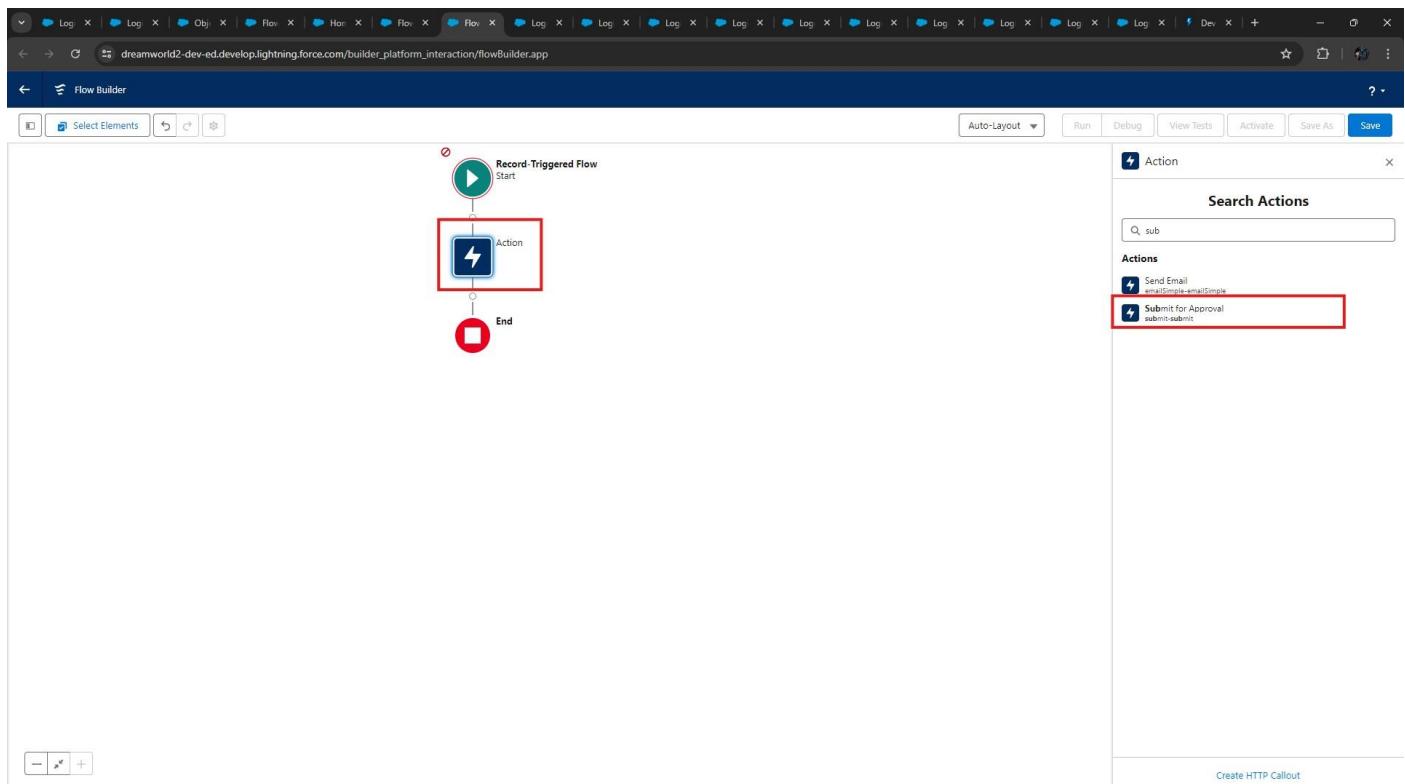
- Select Object → Property
- Select “Trigger the flow when” → “A record is created” • Set Entry Conditions → “None”



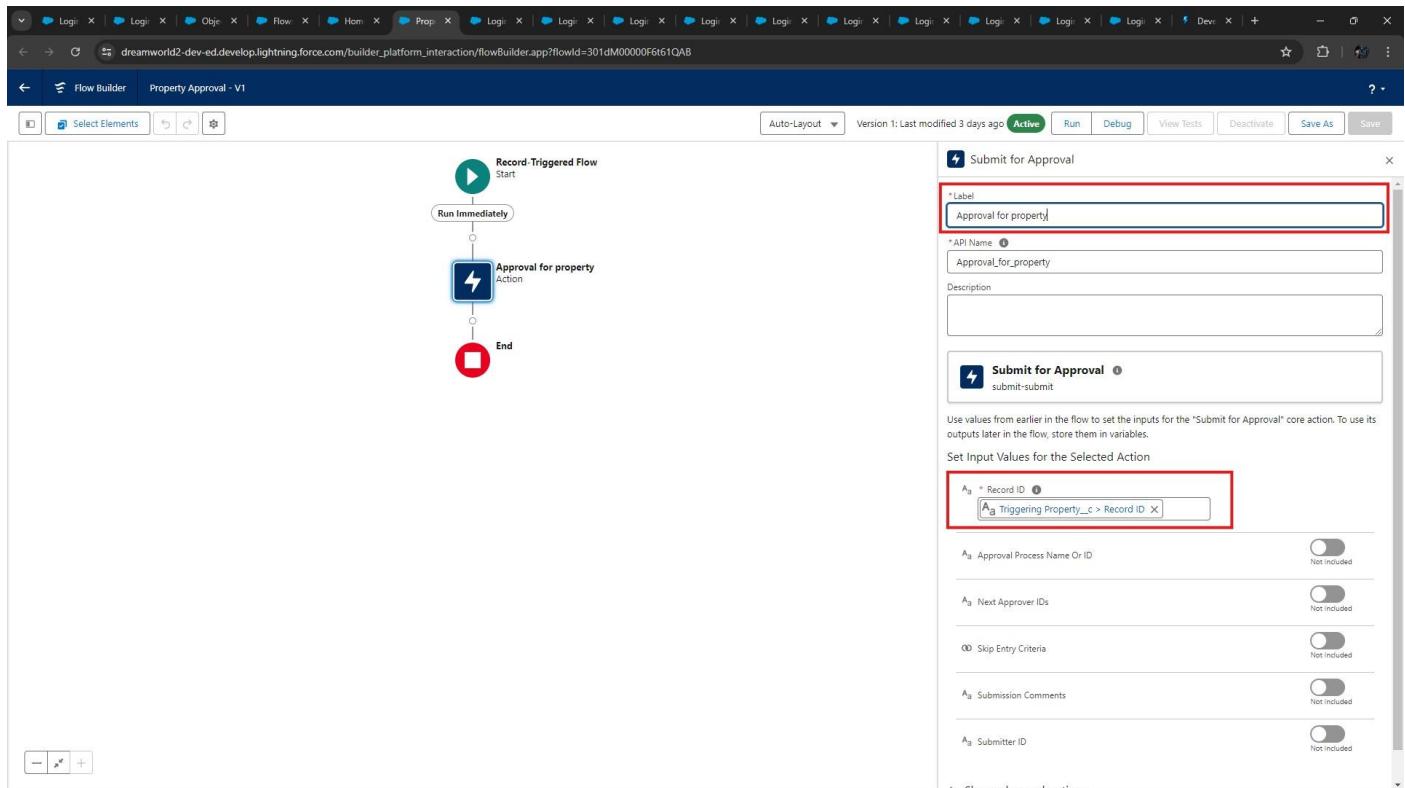
- Click on “Add Element” and add “Action” element.



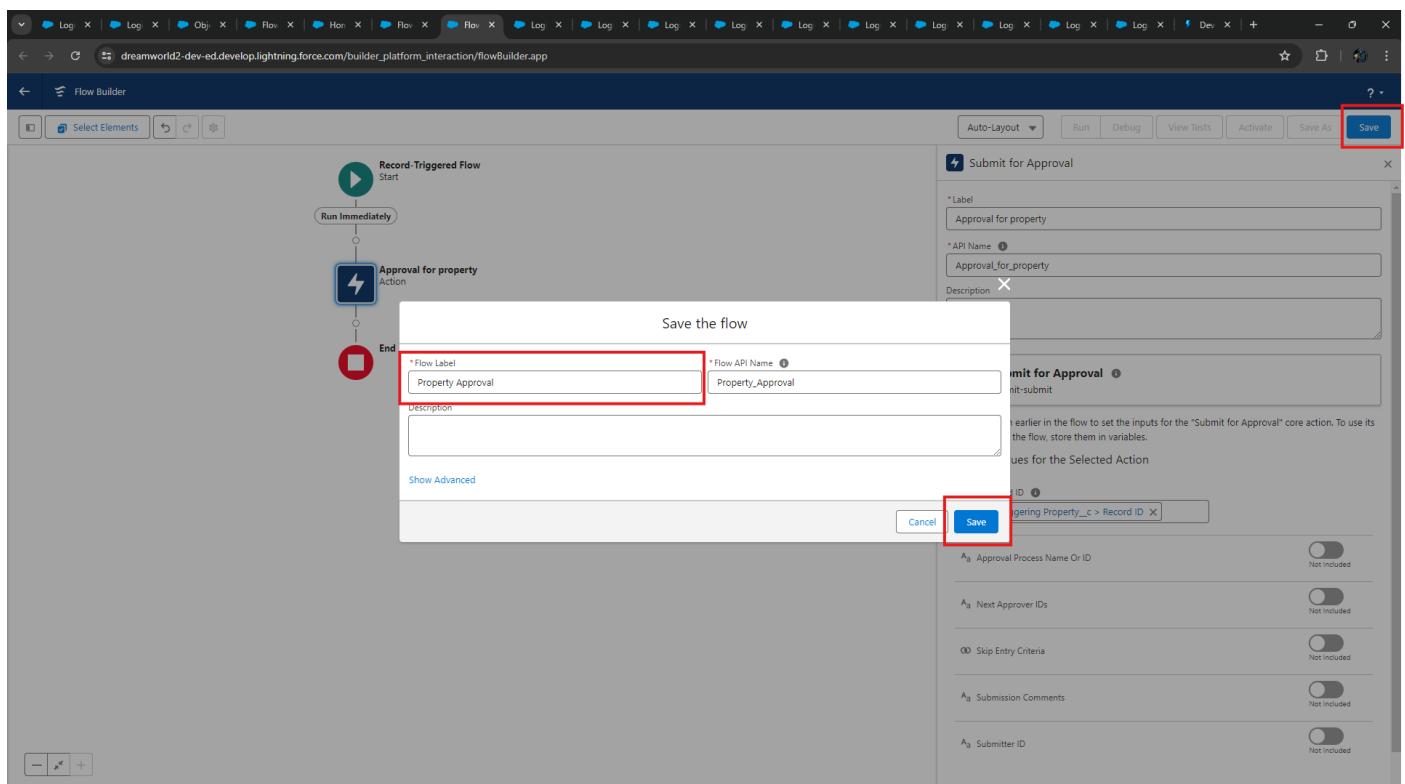
- Search for “Submit for Approval” action and select it.

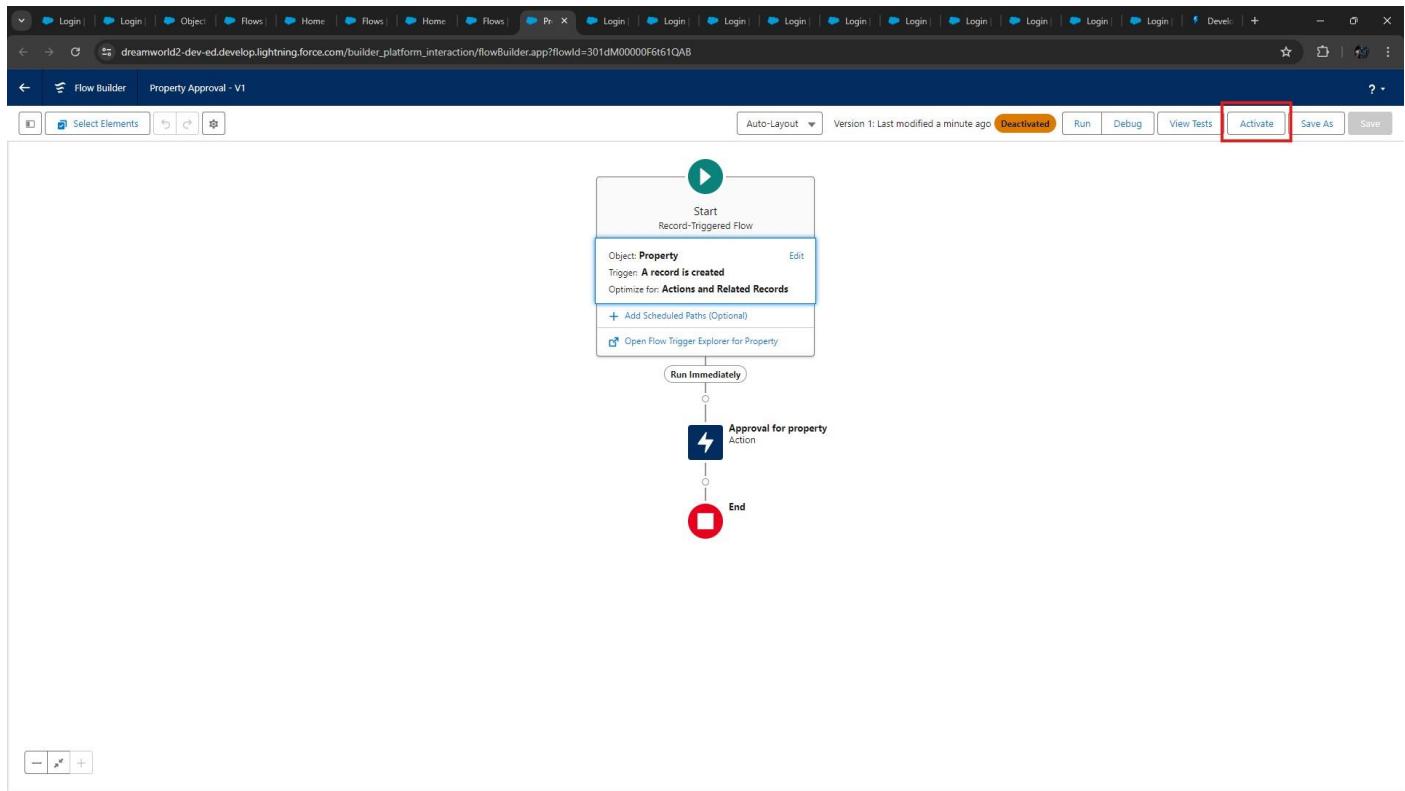


- Give Label Name: “Approval for property”.
- Select Record Id → Triggering Property__c > Record ID.



- Click on “Save”.
- Save the Flow and Give label as → “Property Approval” and “Activate”.





- After creating the flow, the result is shown in below picture.

The screenshot shows the Salesforce Setup Home page with the 'Flows' tab selected. On the left, there's a sidebar with various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, and Platform Tools. The main area displays a table of flows. The 'Property Approval' flow is highlighted with a red box in the 'All Flows' list. The table columns include Flow Label, Process Type, Active, Template, Package State, Last Modified By, and Last Modified Date. The 'Property Approval' flow is listed as an Autolaunched Flow, Active, with Unmanaged package state, last modified by Viswa Bolloju on 02/07/2024, 1:41 am.

| Flow Label | Process Type | Active | Template | Package State | Last Modified By | Last Modified Date |
|--|----------------------------|-------------------------------------|-------------------------------------|-------------------|------------------|---------------------|
| Property Approval | Autolaunched Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Unmanaged | Viswa Bolloju | 02/07/2024, 1:41 am |
| Basic Approval Request | Flow Orchestration for CMS | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |
| CMS: Check Whether Any Step is Completed | Evaluation Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |
| CMS: Notify Content Author | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |
| CMS: Review Content | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |
| CMS: Submit Content for Review | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |
| CMS: Withdraw Review Request | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |
| Enablement: Send Feedback Ready Notification | Autolaunched Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Managed-installed | | |
| Add or Modify Service Appointment Attendees | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Managed-installed | | |
| Create Waitlist | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |
| Enroll or Unenroll Service Appointment Attendees | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |
| Outbound New Appointment | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |
| Inbound New Guest Appointment | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |
| Inbound Cancel Appointment | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-installed | | |

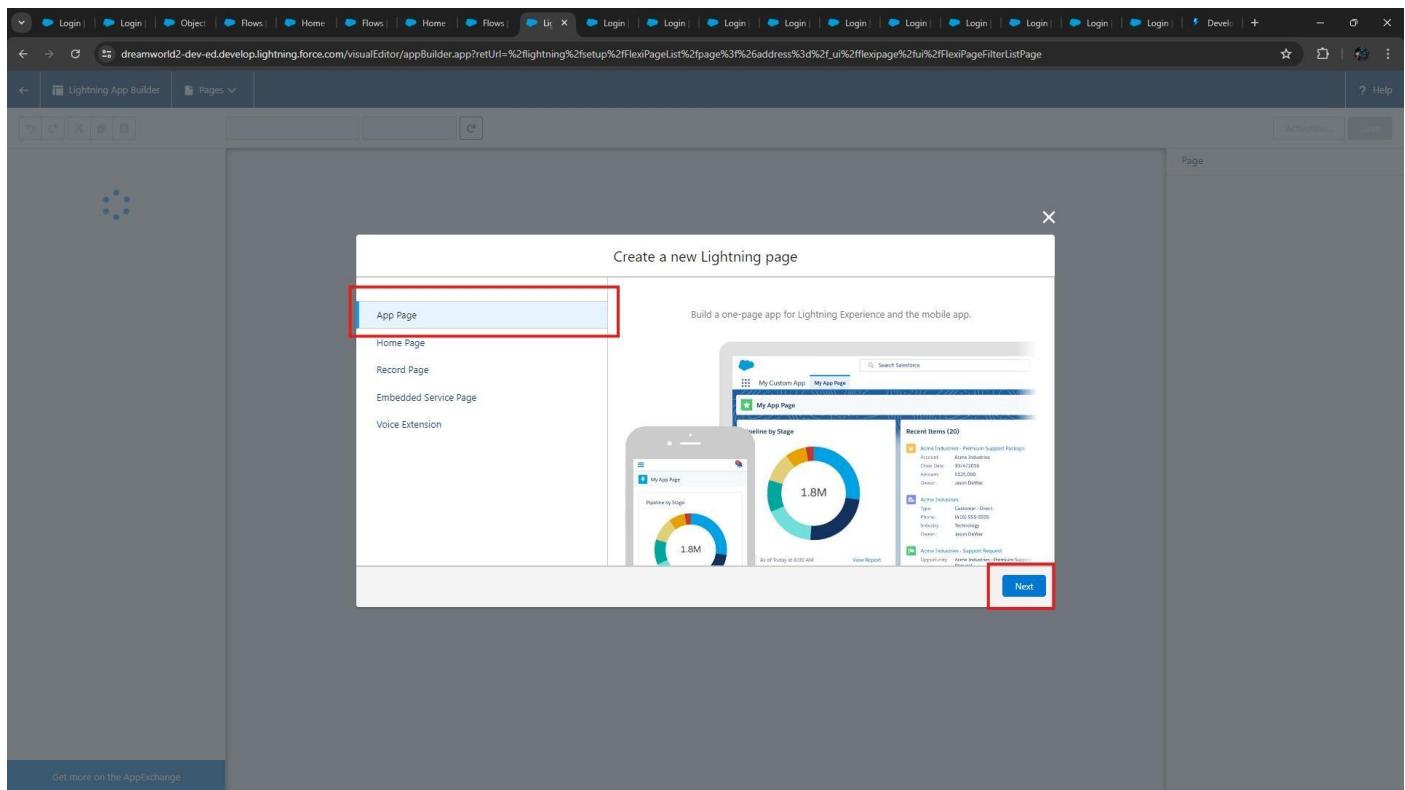
Step 13: Create an App Page

Create an App Page on the Property details Object named as “Search Your Property”.

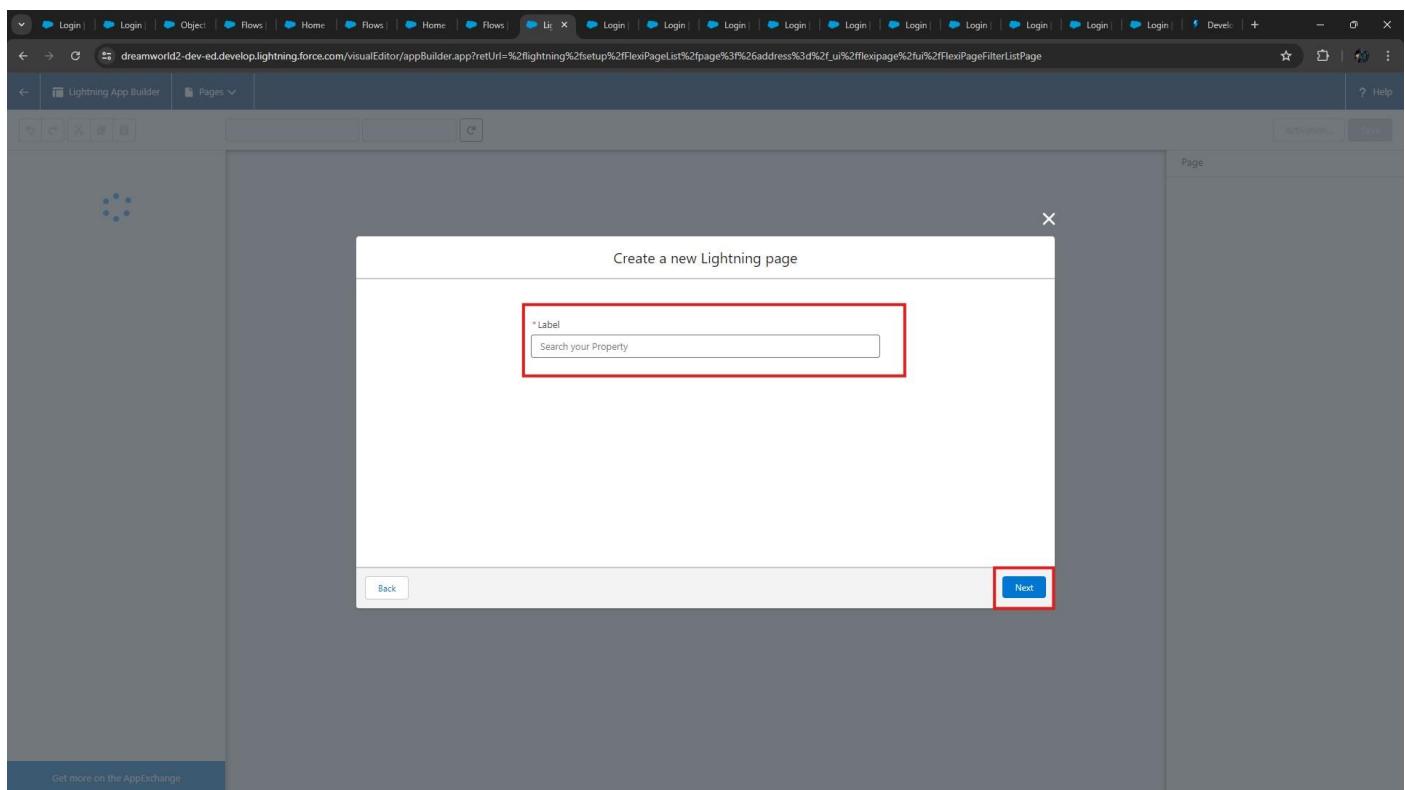
- From Setup → Go to Lightning App Builder → Click on New → Select App Page and Click on Next.

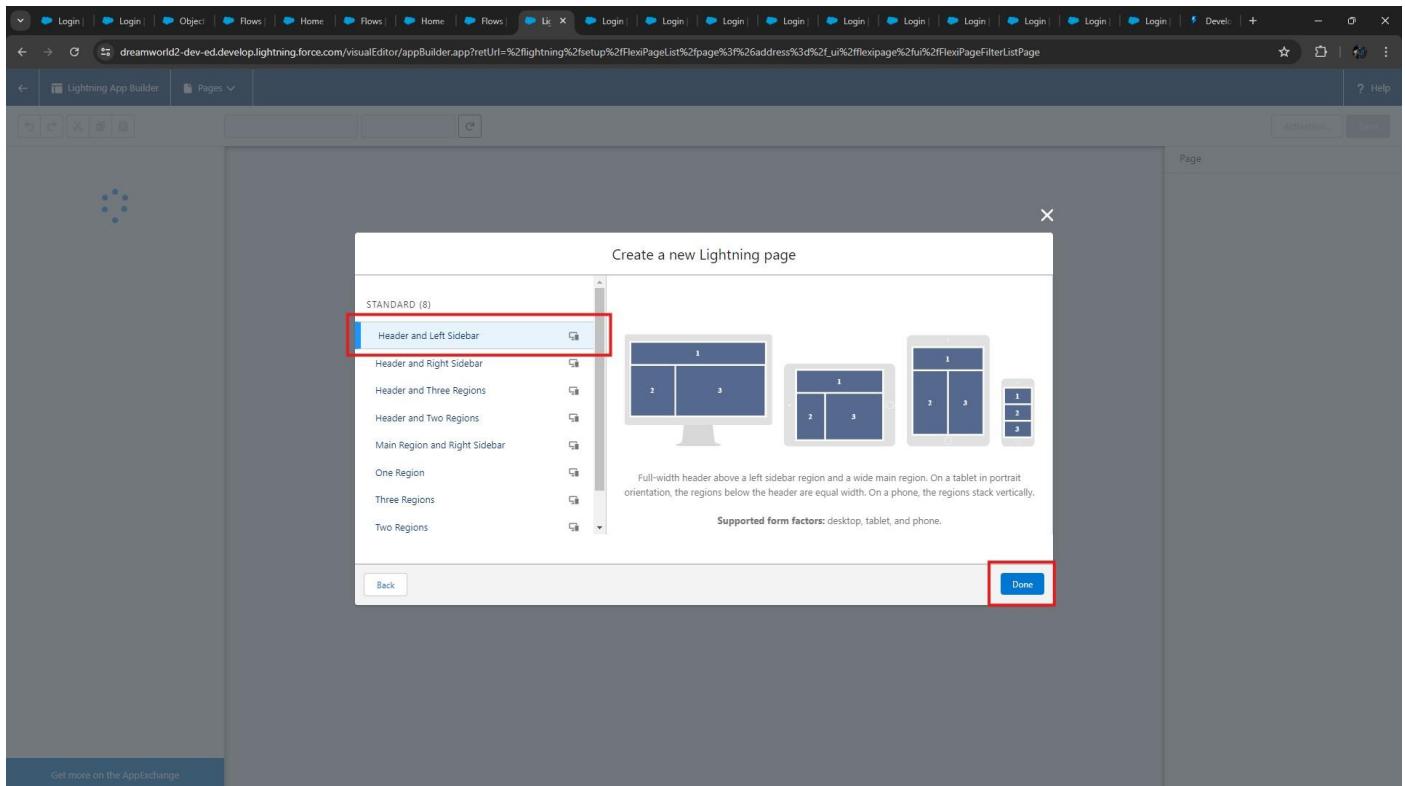
The screenshot shows the Salesforce Setup Home page. The top navigation bar includes links for Login, Object, Flows, Home, Flows, Home, Flows, and a search bar labeled "Search Setup". Below the navigation is a sidebar with sections like Feature Settings, Service, Field Service, User Interface, and a search bar for "Q. App b". The main content area features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these cards is a section titled "Most Recently Used" listing items such as "Property Approval", "Unverified Property", "Verified Property", "Customer2", "Customer", and "Executive".

The screenshot shows the Lightning App Builder page. The top navigation bar includes links for Login, Object, Flows, Home, Flows, Home, Flows, and a search bar labeled "Search Setup". The sidebar lists various setup categories like Service Setup Assistant, Commerce Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage Optimizer, Sales Cloud Everywhere, Administration, Platform Tools, and more. The main content area is titled "Lightning Pages" and shows a table of existing pages. A red box highlights the "New" button in the top right corner of the table header. The table columns include Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. Two rows are visible: "Home_Page_Default" (Type: Home Page) and "Search_your_Property" (Type: App Page).



- Give Label as “Search your Property” click “Next”.





- Click “Header and Left Sidebar” and Click on “Done”.
- After clicking “Done” below page appears.

The screenshot shows the Lightning App Builder interface after creating a new page. The page has a 'Header and Left Sidebar' template applied. The main content area contains three 'Add Component(s) Here' buttons. The left sidebar is visible on the left side of the screen.

- Click on “Save” and then click on “Activate”. From Page Setting select page activation as “Activate for all Users”.

Activation: Search your property

PAGE SETTINGS
LIGHTNING EXPERIENCE
MOBILE NAVIGATION

Give this app page a name, set the page visibility, and choose an icon.

Name

Enter a name for your page.

Icon

Choose an icon to represent your app in Lightning Experience and the mobile app.

Change...

Page Activation

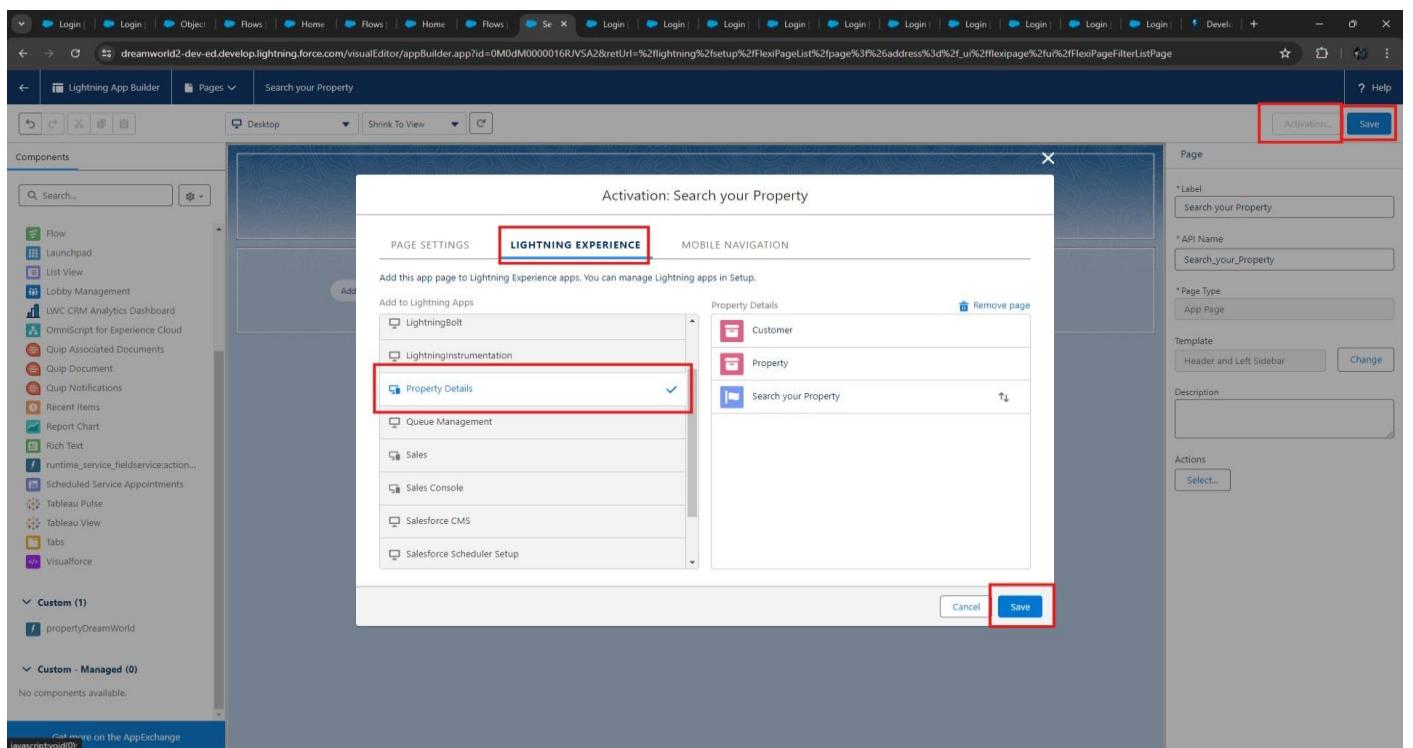
When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup.

Activate for all users
 Activate for system administrators only

To set further restrictions on who sees this page, use permission sets and profile assignments in Setup.

Cancel
Save

- From Lightning Experience Click on “Property Details” and click on “Add Page” and then click on “Save”.



Step 14: Create a LWC Component

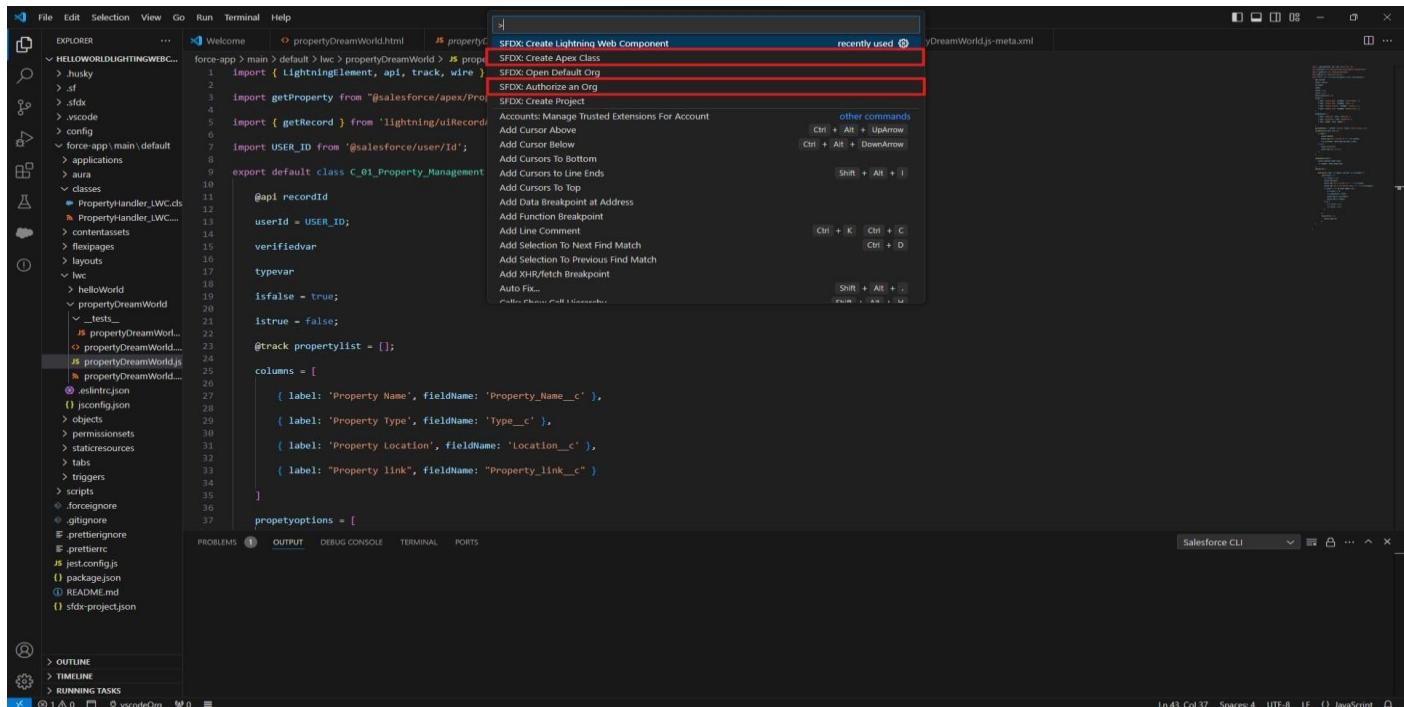
Create an LWC Component for the customers so that only verified customers can access the verified properties and non-Verified customers can access non verified properties, and deploy it on “**Search your Property Page**”

- Create an Apex Class and make it aura enabled and name it “PropertyHandler_LWC”.
 - Install Salesforce CLI (Command Line Interface) and VS-Code into your Computer.

The screenshot shows the VS Code interface with the following details:

- File Explorer:** On the left, it displays the project structure under "HELLOWORLDLIGHTINGWEBC...". Key files shown include "PropertyHandler_LWC.js", "PropertyHandler_LWC.cs", and "propertyDreamWorld.js".
- Code Editor:** The main area shows the "propertyDreamWorld.js" file content. The code defines a class "C_01_Property_Management" extending "LightningElement". It includes imports for "LightningElement", "api", "track", and "wire". The class has properties like "verifiedvar" and "typevar", and methods like "isfalse" and "istrue". It also includes a "columns" array and a "propetyoptions" object.
- Search Bar:** At the top, the search bar contains the text "HelloWorldLightingWebComponent".
- Bottom Status Bar:** Shows "Ln 43, Col 37" and "Spaces: 4" along with icons for "UTF-8", "LF", and "JavaScript".

- Create a Lightning Web Component in your VS-Code, and (ctrl+shift +P) and click on authorize an org.
- Enter your login id and password to authorize your org.
- After logging into the Salesforce Developer Org. Again press (ctrl+shift +P) and Select “**Create Apex Class**”.



- Write the Apex Code and Save the class.
- Again press (ctrl+shift +P) and Select “**SFDC: Create Lightning Web Component**”. And name it anything you want, Ex: “propertyDreamWorld”.
- Write the “JavaScript” code, “HTML” code and “XML” code and save the code in your local directory.

The screenshot shows the Visual Studio Code interface with the SFDX extension installed. A context menu is open over the 'propertyDreamWorld.js' file in the Explorer sidebar. The menu path 'SFDX: Create Lightning Web Component' is highlighted. Other options visible include 'SFDX: Create Apex Class', 'SFDX: Open Default Org', 'SFDX: Authorize an Org', and 'SFDX: Create Project'. The code editor shows the LWC component code, and the bottom status bar indicates 'Salesforce CLI'.

- Right Click on the “**propertyDreamWorld**” file and click on “**SFDC: Deploy this Source to Org**”.
- Exactly do the same thing to Apex Class: “**PropertyHandler_LWC.cls**”.

The screenshot shows the Visual Studio Code interface with the SFDX extension installed. A context menu is open over the 'PropertyHandler_LWC.cls' file in the Explorer sidebar. The menu path 'SFDX: Deploy This Source to Org' is highlighted. Other options visible include 'SFDX: Delete from Project and Org', 'SFDX: Diff Folder Against Org', and 'SFDX: Generate Manifest File'. The code editor shows the Apex class code, and the bottom status bar indicates 'Salesforce CLI'.

- After deploying it will give you a message that says “**Running SFDC: Deploy this source to Org**”.

The screenshot shows the VS Code interface with the following details:

- File Explorer:** On the left, it displays the project structure under "HELLOWORLD__c". The "classes" folder is expanded, showing files like "PropertyHandler_LWC.cls", "propertyDreamWorld.js", and "propertyDreamWorld.meta.xml".
- Code Editor:** The main area shows the "propertyDreamWorld.js" file. The code defines a LightningElement named "C_01_Property_Management" that interacts with the "PropertyHandler_LWC" class via the "PropertyHandler" API.
- Terminal:** At the bottom, the terminal window shows the command "Starting SFDX: Deploy This Source to Org".
- Status Bar:** The status bar indicates "Running SFDX: Deploy This Source to Org" and "Source: Salesforce CLI Integration".

- Success message will appear in the VS-Code if the code deploys correctly without errors.

The screenshot shows the VS Code interface with the following details:

- File Explorer (Left):** Shows the project structure under "HELLOWORLD".
- Editor (Main Area):** Displays the content of `propertyDreamWorld.js`. The code defines a `LightningElement` named `C_01_Property_Management` with properties `recordId`, `userId`, `verifiedvar`, and `typevar`. It includes a `columns` array and a `propertyschema` object.
- Status Bar:** Shows the command `02:17:25.918 Starting SFDX: Deploy This Source to Org`.

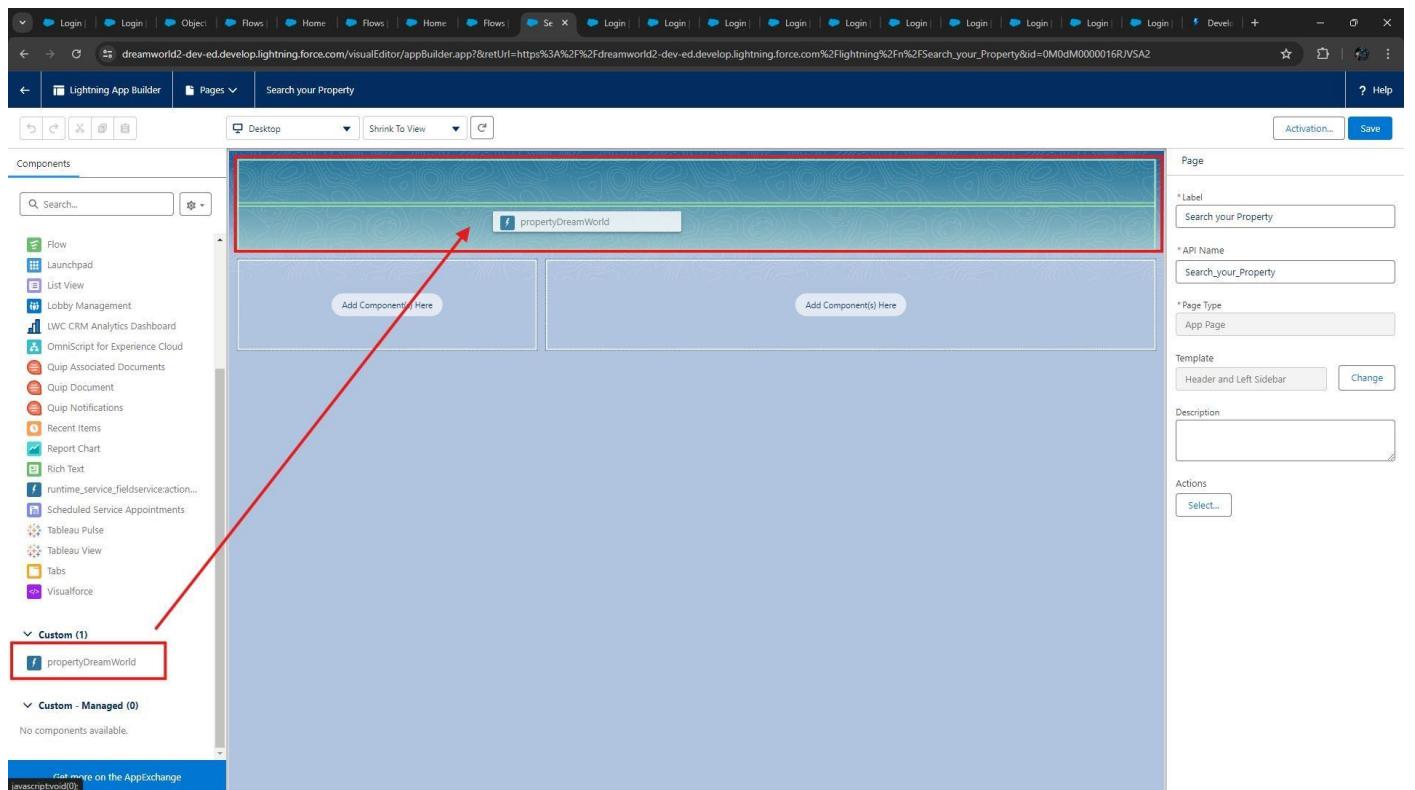
Step 15: Drag Lightning Web Component to your App Page

- From **Setup** → Go to **App Launcher** → Search for “**Property Details**”.

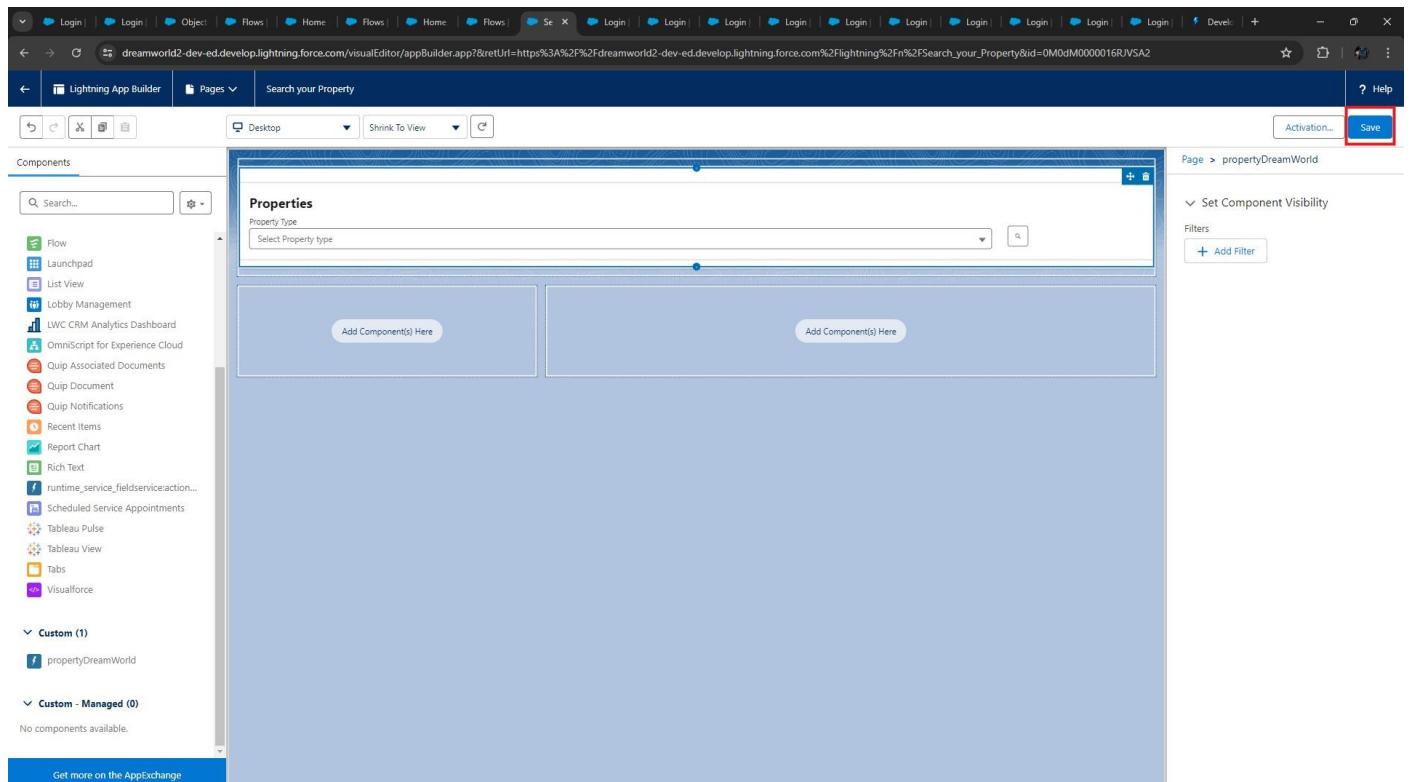
- On this “Search your Property” Page click on gear icon and click on Edit Page.

https://dreamworld2-dev-ed.lightning.force.com/lightning/n/Search_your_Property

- Drag the Component to your App Page.



- Save the Page.



Step 16: - Give Access of Apex Classes to Profiles

- From Setup → Search for **Apex Classes** → Click on “Security” behind “PropertyHandler__LWC”.

The screenshot shows the Salesforce Setup interface with the search bar set to "apex". The left sidebar is expanded, showing sections like Email, Custom Code, Environments, and Jobs. Under Custom Code, the "Apex Classes" section is selected and highlighted with a red box. In the main content area, the "Apex Classes" page is displayed. A specific Apex class, "PropertyHandler__LWC", is listed in the table. The "Security" link, which is the "Edit" link followed by "Security", is highlighted with a red box. An arrow points from the text "Click on ‘Security’ behind ‘PropertyHandler__LWC’." to this link. The URL in the browser address bar is https://dreamworld2-dev-ed.lightning.force.com/lightning/setup/ApexClasses/home.

- From Profiles Add “Manager” and “Customer” and “Save”.

The screenshot shows the Salesforce Setup interface with the search bar set to "apex". The left sidebar is expanded, showing sections like Email, Custom Code, Environments, and Jobs. Under Custom Code, the "Profiles" section is selected and highlighted with a red box. In the main content area, the "Profiles" page is displayed for the "PropertyHandler__LWC" profile. The "Enabled Profiles" list shows "Customer" and "Manager" profiles, both highlighted with red boxes. A red box also highlights the "Save" button at the top right of the modal. An arrow points from the text "Add ‘Manager’ and ‘Customer’ and ‘Save’." to the "Save" button. The URL in the browser address bar is https://dreamworld2-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fu%2Fprofile%2FApexClassProfilePermissionEdit%2Fe%3Fapex_id%3D01pdM000003xm25%26apex_name%3DPropertyHandler__LWC%... .

7. OBSERVATIONS AND FINDINGS: -

Website Integration:

Implementation of Form on the website:

- In the jot form, information captured includes name, phone, email, address, and property interest. This meets the need of capturing essential details.
- This is done by linking the form to Salesforce and then going ahead to map the fields. This will ensure capturing essential details of the Customer which is used by the Company “Dreams World Properties”.

Requirements in Setting up Salesforce Configuration:

Setting up the Salesforce Objects and Fields:

- Set up the custom object for customers and property from spreadsheets.
- Set up setup fields for name, contact information, preferences and approval status presumably during the setup of the objects.
- Setting up custom fields and workflows would imply the validation rules and data integrity checks.
- Security settings are configured by creating roles and profiles and controlling access based on approval status.

Approval Process Requirements

Define Criteria and Implement Approval Process:

- Specifically, the approval process for the Property object is defined with criteria and approval steps.
- The field "Verified" gets updated automatically in case of the approved users so that they can directly access curated listings.

User Experience Requirements

Design User Interfaces:

- I have created a Lightning App called "Property Details" where customer records would be maintained along with their property listings.
- LWC component enables both **verified** and **non-verified** users to see applicable property listings thus enhancing the user experience, Steps do not include anything about training and documentation for internal staff hence not fully addressed.

Integration Testing and Quality Assurance Requirements

- Here in testing part, we have created two Customers users one is “Verified” and Other is “Un-Verified”. This all works by the Apex class running in the background.
- Normally the scope of the Project is to Show the “Verified” Properties to Verified Customers and “UnVerified” Properties to Un-Verified Customers.
- As per Business, “Verified” Users are premium users and they get to have premium services. We have designed the Application in such way as per business requirements.

| Property Name | Type | Location | Verified |
|----------------------|-------------|------------------------|-------------------------------------|
| Lotus Apartments | Residential | hyderabad | <input checked="" type="checkbox"/> |
| 500000 sq.ft plot | Commercial | Amravati | <input type="checkbox"/> |
| 3 BHK flat at stanza | Rental | Jubilee hill Hyderabad | <input type="checkbox"/> |
| 1 Acre Villa | Commercial | Pune | <input type="checkbox"/> |
| 3 BHK Flat | Residential | Hyderabad | <input type="checkbox"/> |
| 2 BHK Flat: 402 | Commercial | Hyderabad | <input type="checkbox"/> |
| Sandhara Houses | Commercial | Mumbai | <input type="checkbox"/> |

- In testing, I have logged into Verified user to check whether it is showing “Verified Properties” to Verified Users. The testing was successful, and it is displaying the verified properties to verified Users.

| Property Name | Property Type | Property Location | Property link |
|------------------|---------------|-------------------|---------------|
| Lotus Apartments | Residential | hyderabad | |

- From the Verified User, when I searched for Residential Properties, it showed only verified Properties to verified user.
- The same way logged into Un-verified user, and it is successfully showing Un-verified properties to UnVerified users.
- As you can see, we have Unverified Properties records in the Property Object. By logging into Unverified user in salesforce, we can see this unverified property as the result when customer searches for different types of properties.

| | Property | Property Name | Type | Location | Verified |
|---|--------------------|----------------------|-------------|-------------------------|-------------------------------------|
| 1 | a04dm00000005gdp | Lotus Apartments | Residential | hyderabad | <input checked="" type="checkbox"/> |
| 2 | a04dm00000005gdq | 500000 sq.ft plot | Commercial | Amravati | <input type="checkbox"/> |
| 3 | a04dm00000005gdr | 3 Bhk flat at stanza | Rental | Jubilee hill Hydeebabad | <input type="checkbox"/> |
| 4 | Bheshma Properties | 1 Acre Villa | Commercial | Pune | <input type="checkbox"/> |
| 5 | Janu Properties | 3 BHK Flat | Residential | Hyderabad | <input type="checkbox"/> |
| 6 | Janu Properties | 2 BHK Flat: 402 | Commercial | Hyderabad | <input type="checkbox"/> |
| 7 | Janu Properties | Sandhara Houses | Commercial | Mumbai | <input type="checkbox"/> |

- From the below picture, I have logged into Un-verified user and searched for Commercial Properties, and it showed all unverified properties to the Un-verified user.
- In conclusion, the application is working perfectly.

| Property Name | Property Type | Property Location | Property link |
|-------------------|---------------|-------------------|---------------|
| 500000 sq.ft plot | Commercial | Amravati | |
| 2 BHK Flat: 402 | Commercial | Hyderabad | |
| Sandhara Houses | Commercial | Mumbai | |
| 1 Acre Villa | Commercial | Pune | |

Working flow of Property records.

- When we create a record in the property record without “Verified” checkbox, automatically the “Record Trigger Flow” triggers as per condition. It goes directly to the Approval Process as per conditions.

Property Details Customer Property Search your Property

Janu Properties

Property Name: Samdhara Houses | Type: Commercial | Location: Mumbai | Verified:

Related Details

| | |
|---------------|-------------------------------------|
| Property | Janu Properties |
| Owner | Viswa Bolloju |
| Property Name | Samdhara Houses |
| Type | Commercial |
| Location | Mumbai |
| Verified | <input checked="" type="checkbox"/> |

Created By: Viswa Bolloju - 28/06/2024, 11:52 pm Last Modified By: Viswa Bolloju - 28/06/2024, 11:52 pm

Activity Chatter

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

- After a while, the approval request email received to registered email-id of the Executive user, because executive is the only approver.

mail.google.com/mail/u/0/#inbox/1Mtcg2QVxRckzFpkmdJxqzrXNFHzWkMT

Google Chrome isn't your default browser Set as default

Gmail Search mail

Inbox 3,179

Approval Request ↳ inbox x

Viswa Bolloju <vz55pgocmtaqf5.dhn-5pnqwauu.ind136.bnc.salesforce.com> to me ▾

Fri, Jun 28, 11:57 PM (4 days ago)

Be careful with this message

This may be a spoofed message. The message claims to have been sent from your account, but Gmail couldn't verify the actual source. Avoid clicking links or replying with sensitive information, unless you are sure you actually sent this message. (No need to reset your password, the real sender does not actually have access to your account!)

Report spam Looks safe

Viswa Bolloju has requested your approval for the following item: <https://dreamworld2-dev-ed.my.salesforce.com/b/process/ProcessInstance/WorkItem/WizardStageManager?id=04idM000000CKF>

Please click this link to approve or reject this record.

Thank you,
Salesforce

Reply Forward

- Below picture shows the pending records that should be approved by the **executive** user.

The screenshot shows a Salesforce Lightning page titled 'Items to Approve'. At the top, there's a navigation bar with links like 'Log', 'Obj', 'Flow', 'Hor', 'All', 'Janu', and various 'Log' and 'Dev' options. A user profile indicates 'Logged in as Executive (salesexecutive@dreamworld.com)'. Below the navigation is a search bar and a toolbar with icons for refresh, save, and more.

The main content area has a header 'Approval Requests' and 'Items to Approve'. It displays a table with three items:

| Related To | Type | Most Recent Approver | Date Submitted |
|----------------------|----------|----------------------|----------------------|
| 1 Bheshma Properties | Property | Manager | 29/06/2024, 12:21 am |
| 2 Janu Properties | Property | Viswa Bolloju | 28/06/2024, 11:52 pm |
| 3 Janu Properties | Property | Viswa Bolloju | 28/06/2024, 11:42 pm |

- In conclusion, the working of Approval Process with record flow trigger is working properly.