

A CRM Application To Handle The Clients And Their Property Related Requirements

Project Description:

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.

1. Client Management

- Add,update,and delete client details.
- Track client preferences, budget, and location interests.
- Maintain contact details and communication history.

2. Property Management

- Manage property listings with details like type,price,location,features.
- Track properties available for sale , rent ,lease
- Upload photos and documents for properties.

3. Requirement Matching

- Match client requirements with available properties using filters.
- Notify clients about new properties that fit their criteria.

4. Lead Tracking

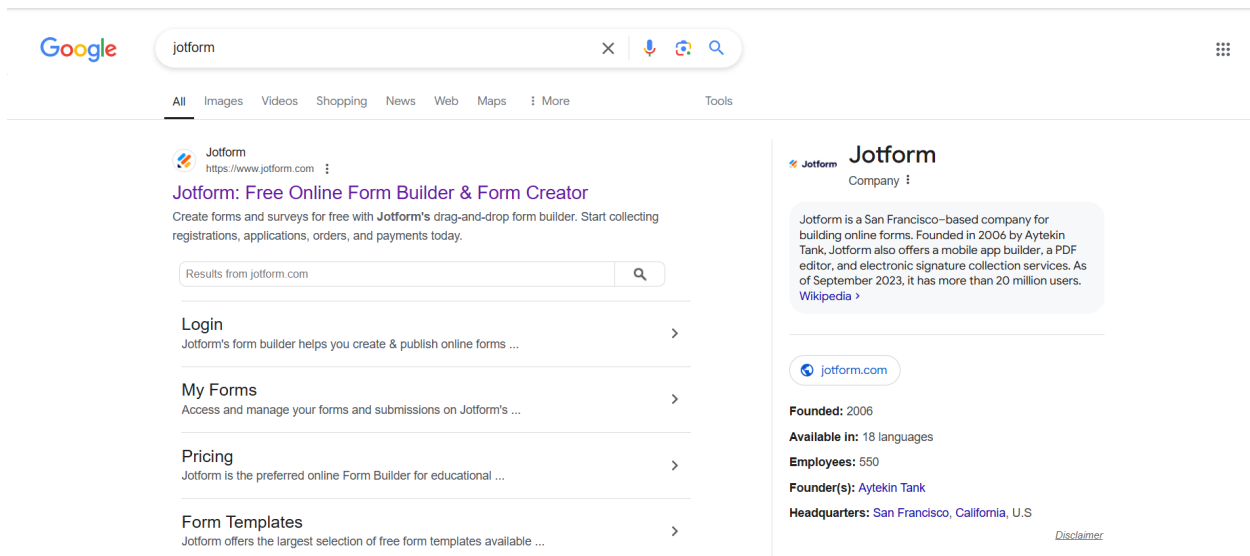
- Manage inquiries and follow up with potential clients
- Schedule meetings and site visits.

Milestone 1 :- Create a Jot form 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

1. Open your browser and search for jotform and log in.



2. After login click on create form and click on start from scratch
3. Now create a form to get the customer details like Name, Phone, Email, Address and type of property the customer is interested in.
4. Once the form is created, publish it by clicking on publish.
<https://www.jotform.com/form/240031134484041>

Dream House!

Name

First Name

Last Name

Email

example@example.com

Phone Number

which type of property are you looking for?

- ☐ RESIDENTIAL
- ☐ COMMERCIAL
- ☐ RENTAL

Budget Amount

Address

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

Create Objects from Spreadsheet.

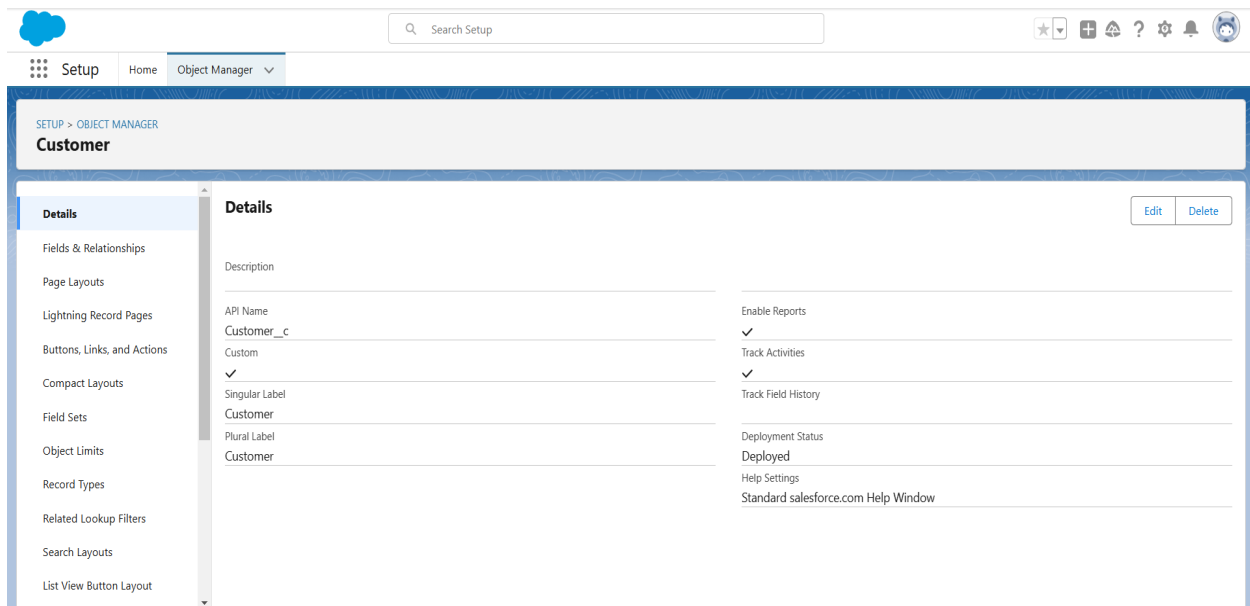
Directly Creating Objects from Spreadsheet in Salesforce

Create Customer object

1. Go to your object manager and and click on create object from spreadsheet.
2. Click on the link to get the spreadsheet
3. [customer](#)

Customer	Phone Number	Emial	State	Property Type	Budget Amount	Street Address	Street Address	City	postal code	Verified
Rakesh	788797	rakesh@gmail.	Telangana	Residential	4000000	gb road	street no 45	Hyderabad	555001	checked
prakash	55448855	p@gmail.com	Maharashtra	Commercial	8000000	gachibowli	indira road	mumbai	6600014	unchecked
Prajwal	454545	prajwal@gmail.	Maharashtra	Rental	25000	kamdli	kathora	Amravati	444805	checked

4. After downloading, upload the file, map the fields and upload to create an object.



The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup" and a navigation menu with "Setup", "Home", and "Object Manager". The "Object Manager" section is active, displaying the "Customer" object. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The "Details" section is selected, showing fields like Description, API Name (Customer_c), Custom, Singular Label (Customer), Plural Label (Customers), and Record Types. On the right, there are checkboxes for "Enable Reports", "Track Activities", and "Track Field History", all of which are checked. Below these, the "Deployment Status" is shown as "Deployed", and the "Help Settings" link is provided.


Create Property object

1. Follow the same from the customer object to create the Property Object







2. [Property](#)

A	B	C	D
Property Name	Type	Location	Verified
Lotus Appartme	Residential	hydeerabad	checked
500000 sq.ft pl	Commercial	Amravati	unchecked
3 Bhk fkat at st	rental	Jubilee hill Hyd	Checked

3. After downloading, upload the file, map the fields and upload to create an object.



Search Setup



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Property

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name

Property_c

Custom

✓

Singular Label

Property

Plural Label

Property

Enable Reports

✓

Track Activities

✓

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Integrate Jotform with Salesforce Platform

In this Milestone we are going to integrate jotform with Salesforce

Activity 1

1. On the Jotform Platform, Click on Integration and choose Salesforce.
2. Click on User Integration and choose “Add to From”.
3. Select the Org with which you want to Integrate your jotform with.
4. Select an Action - Create a record.

Select a Salesforce Object : - Customer

5. Map Each and every field on the Object with the fields on the form and “Save Action”.
6. Then “Save the Integration” and “Finish”.

The screenshot displays the Jotform Form Builder interface. On the left is a dark sidebar with navigation options: FORM SETTINGS, EMAILS, CONDITIONS, THANK YOU PAGE, INTEGRATIONS (highlighted), WORKFLOWS, JOTFORM SIGN, and MOBILE NOTIFICATIONS. The main area is titled 'SALESFORCE' with a sub-header 'Send new leads, contacts, or accounts to your sales CRM'. Below this, a dropdown menu shows 'Customer' selected under 'Select a Salesforce Object'. The 'Create a record' section is active, showing a mapping between 'Object Fields' and 'Dreamhome' fields. The mapping is as follows:

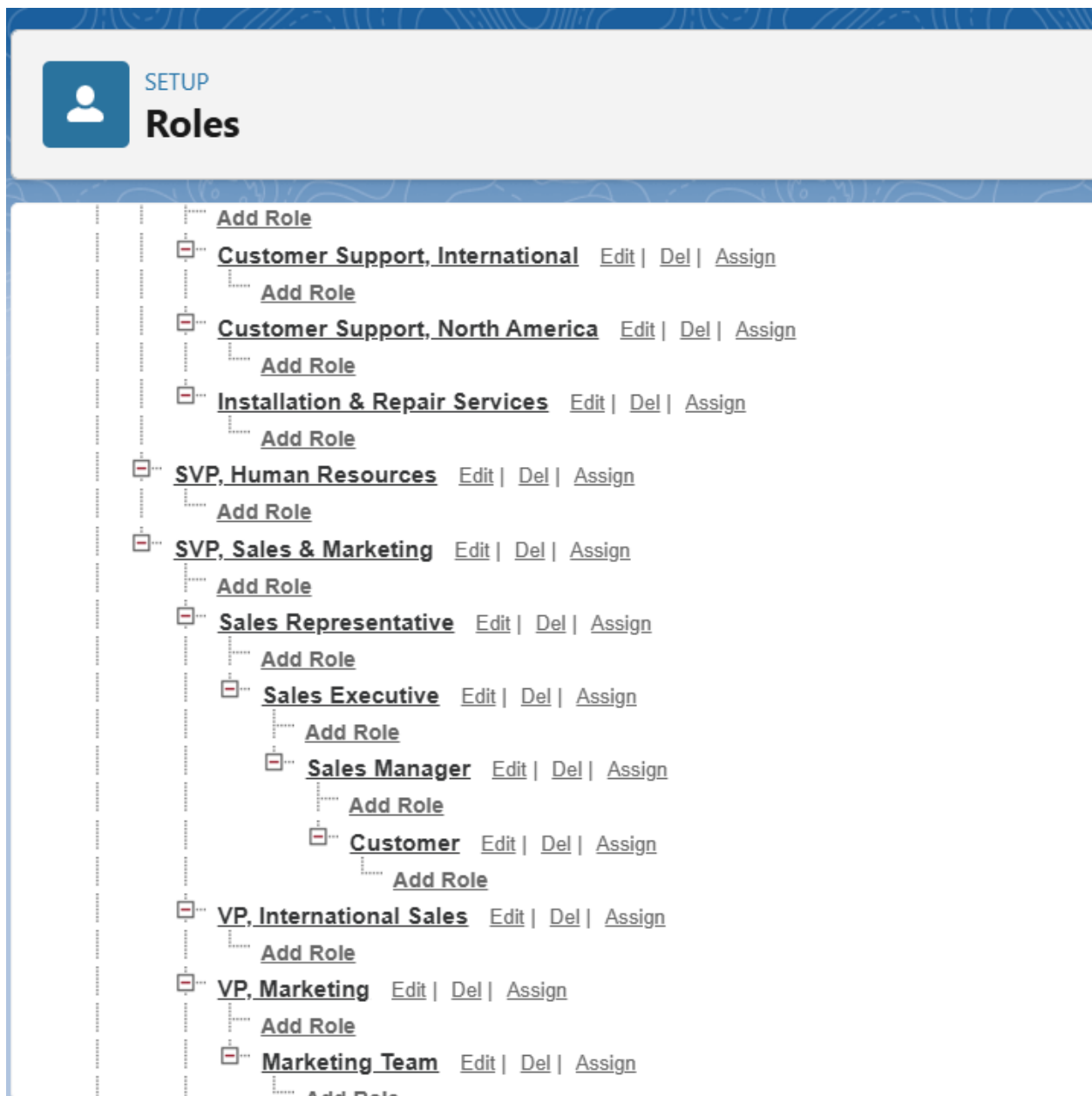
Object Fields	Dreamhome
Customer__c	Name - First Name
City	Address - City
Budget Amount	Budget Amount
Property Type	Which type of property are you lookin...
Phone Number	Phone Number
Street Address	Address - Street Address
Email	Email
Customer Name	Name - Last Name
State	Address - State
Street Address Line 2	Address - Street Address 2

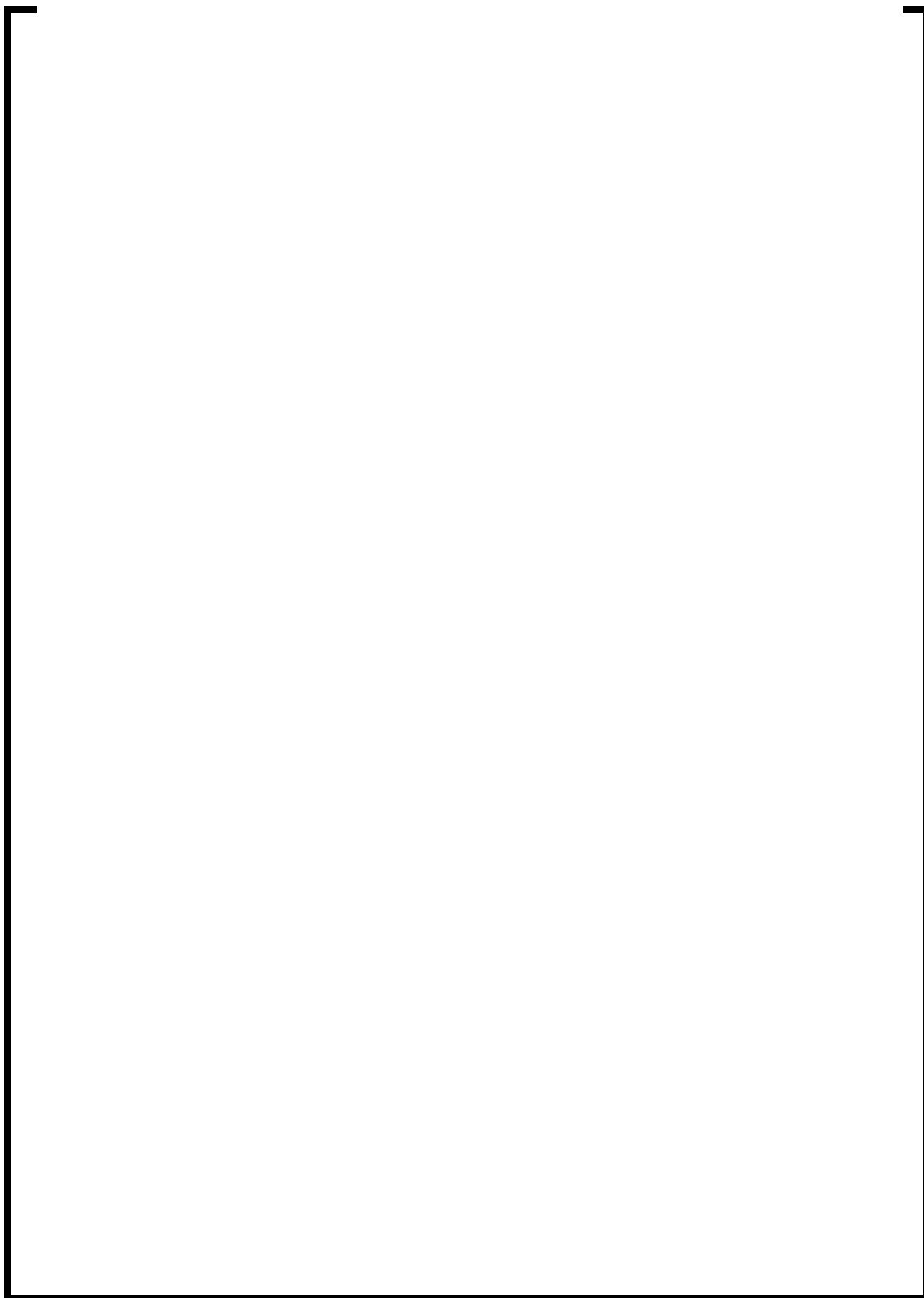
Create Roles

Create Roles as per business requirement

Sales Executive Role

1) Go to Setup and Click on Roles, then click on Expand all and Add a Role just below the Sales Representative

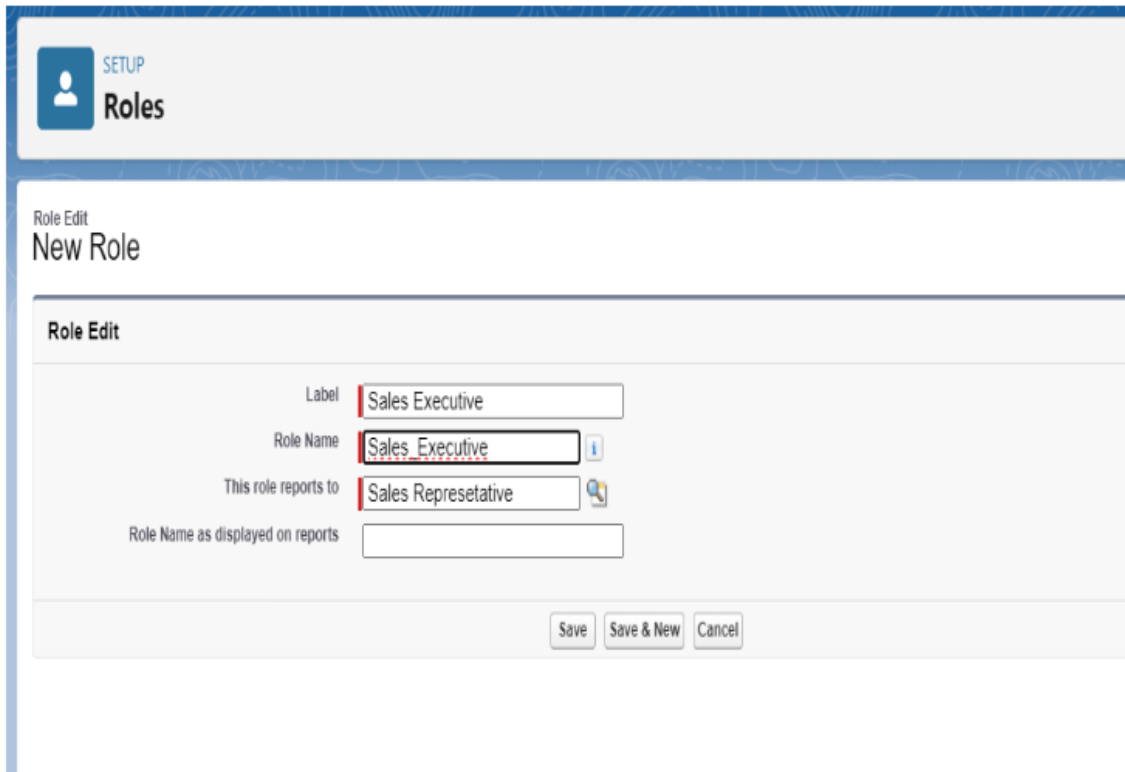




It will use the “System Administrator Profile”.

2) Label - Sales Executive

Reports to - Sales Representative



The screenshot shows a web-based interface for setting up roles. At the top, there is a header bar with a blue icon of a person and the text 'SETUP Roles'. Below this, the page title is 'Role Edit New Role'. The main form area is titled 'Role Edit' and contains four input fields: 'Label' with the value 'Sales Executive', 'Role Name' with the value 'Sales Executive' and a blue information icon, 'This role reports to' with the value 'Sales Representative' and a blue information icon, and 'Role Name as displayed on reports' which is empty. At the bottom of the form, there 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.

Create a Property Details App

An App where the objects will be displayed

Activity 1

1. From Setup>> Go to App Manager and click on New Lightning App and Name it as “Property Details” and add “Customer” and “Property” Object.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ
Search Your Property

*Developer Name ⓘ
Search_Your_Property

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex Value ⓘ
#AAE420

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

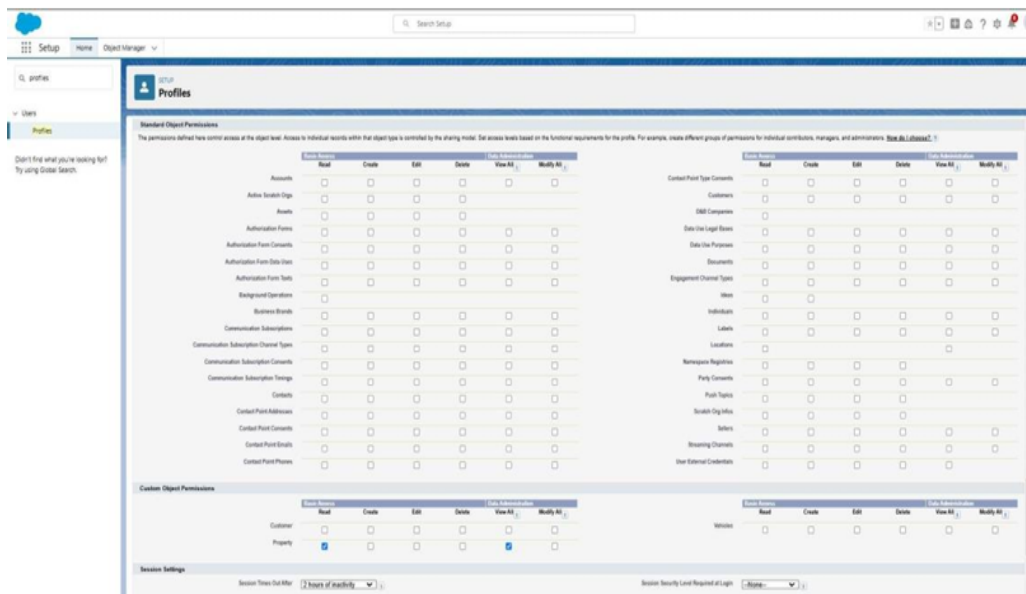
2. Click Next >> Next >> Save and Add “System Admin ”Profile.

Create Profiles

Create profiles as per business requirement

Customer

1. From Setup? Go to Profiles and Clone Salesforce Platform User and Name it “Customer”..
2. Uncheck all the Custom Objects and Check only Property Details From Custom App Settings.
3. Also Remove all the Standard Object Permissions.
4. Uncheck all the Custom Object Permissions and check read and view all in “Property”



Manager

1. From Setup >> Go to Profiles and Clone Salesforce Platform User and Name it “Manager”..
2. Uncheck all the Custom Objects and Check only Property Details From Custom App Settings
3. Also Remove all the Standard Object Permissions.
4. Uncheck all the Custom Object Permissions and check only “modify all” from “Property” and “Customer”.

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access			Data Administration		
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Active Scratch Orgs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Authorization Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Data Uses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Tests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Operations	<input type="checkbox"/>					
Business Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Testings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Content Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Content Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Content Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Content Assets Relationships Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Content Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Content Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Content Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Content Assets Relationships Content Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Content Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships Content Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Assets Relationships						

Create a Check Box field on user

Create Field on the User as per the business requirement.

Activity 1

1. Setup >> Object Manager >> Search for User >> Fields and Relationships
2. Create new Field Named as “Verified” as Data type “Check Box”

The screenshot displays the Salesforce Setup interface for defining a custom field. The breadcrumb trail is **SETUP > OBJECT MANAGER > User**. The left sidebar shows the navigation menu with **Fields & Relationships** selected. The main content area is titled **User Custom Field Verified** and includes a **Back to User Fields** link. Below the title, there are tabs for **Custom Field Definition Detail**, **Set Field-Level Security**, **View Field Accessibility**, and **Where is this used?**. The **Field Information** section contains the following details:

Field Label	Verified	Object Name	User
Field Name	Verified	Data Type	Checkbox
API Name	Verified__c		
Description			
Help Text			
Data Owner			
Field Usage	User Custom Field: Verified ~ Salesforce - Developer Edition		
Data Sensitivity Level			
Compliance Categorization			
Created By	Pasupuleti Sindhu	Modified By	Pasupuleti Sindhu
	19/11/2024, 11:56 am		19/11/2024, 11:56 am

The **General Options** section shows the **Default Value** is **Unchecked**. At the bottom, the **Validation Rules** section has a **New** button and a **Validation Rules Help** link.

Create Users

Create three different users with three different Roles and profiles as we have mentioned above.

User 1

1. Go to Setup --> Administration --> Users --> New User
2. Last Name - Executive
3. Role - Sales Executive
4. License - Salesforce
5. Profile - System Administrator
6. Save

[Users in Sales Executive Role \(1\)](#)

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	Pasupuleti Sindhu, 21/11/2024, 7:08 pm	Sharing Groups	Role, Role Internal and Portal Subordinates, 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		
Partner Role	<input type="checkbox"/>	<div>Role: Sales Executive ~ Salesforce - Developer Edition</div>	
Customer Role	<input type="checkbox"/>		

User 2

1. Go to Setup >> Administration >> Users >> New User
2. Last Name >> Manager
3. Role >> Sales Manager
4. License >> Salesforce Platform
5. Profile >> Manager
6. Save

Users in Sales Manager Role (1)

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	Pasupuleti Sindhu, 21/11/2024, 7:09 pm	Sharing Groups	Role, Role Internal and Portal Subordinates, 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		
Partner Role	<input type="checkbox"/>		
Customer Role	<input type="checkbox"/>		

Role: Sales Manager - Salesforce - Developer Edition

User 3

1. Go to Setup >> Administration >> Users >> New User
2. Last Name >> Customer
3. Role >> Customer
4. License >> Salesforce Platform
5. Profile >> Customer
6. Make Sure the verified check box is “Unchecked”
7. Save

Users in Customer Role (2)

Role Detail Edit Delete

Label	Customer	Role Name	Customer
This role reports to	Sales_Manager	Role Name as displayed on reports	
Modified By	Pasupuleti Sindhu, 21/11/2024, 7:09 pm	Sharing Groups	Role, Role Internal and Portal Subordinates, 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		
Partner Role	<input type="checkbox"/>		
Customer Role	<input type="checkbox"/>		

User 4

1. Go to Setup >> Administration >> Users >> New User
2. Last Name >> Customer2
3. Role >> Customer
4. License >> Salesforce Platform
5. Profile >> Customer
6. Make Sure the verified check box is “checked”
7. Save

Users in Customer Role (2)

Role Detail

Edit Delete

Label	Customer	Role Name	Customer
This role reports to	Sales ManagerRole Name as displayed on reports		
Modified By	Pasupuleti Sindhu, 21/11/2024, 7:09 pmSharing GroupsRole, Role Internal and Portal Subordinates, 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		
Partner Role	<input type="checkbox"/>	Role: Customer ~ Salesforce - Developer Edition	
Customer Role	<input type="checkbox"/>		

Create an Approval Process for Property Object

An Approval process to approve or reject the records as according

Activity 1

1. From Setup >> Process Automation >> Approval Process
2. Process Name - Property Approval
3. Give 2 criteria -
 - a. Location is not equal to blank,
 - b. Verified Equals false.
4. Click next and “Next Automated Approver Determined By” Select Manager
5. From Record Editability Properties >> Click on Administrators OR the currently assigned approver can edit records during the approval process.
6. From Step 5. Select Fields to Display on Approval Page
7. Layout select Property Owner, Location, Type.

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		Selected Fields
Created By	Add Remove	Property
Last Modified By		Owner
Property link		Location
Verified		Property Name
		Type

Up
Down

[Click here to view an example](#)

8. Click Next and Select the initial Submitters >>
 - 1) Owner >> Property Owner
 - 2) Roles >> Sales Manager
9. Save.
10. Add an approval step name “Executive Approval ”
11. specify the Criteria >> All record should enter
12. click next and select the Approver as “ Sales Executive “ and “Save”

13. Add One field Update as “Verified Property”

1. Select Object >> Property
2. Field to Update >> Verified
3. Field Data Type >> CheckBox
4. Select CheckBox Option as “True”
5. Save.

14. 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.

Google Chrome isn't your default browser [Set as default](#)

Search Setup

Setup Home Object Manager

appro

Data

Mass Transfer Approval Requests

Process Automation

Approval Processes

Didn't find what you're looking for?
Try using Global Search.

Approval Processes

Process Definition Detail

Edit Clone Delete Activate

Process Name Property Approval Active ☐

Unique Name Property_Approval Next Automated Approver Determined By Manager of Record Submitter

Description

Entry Criteria (Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS false)

Record Editability Administrator ONLY Allow Submitters to Recall Approval Requests ☐

Approval Assignment Email Template

Initial Submitters Property Owner: Role: Sales Manager

Created By Pasupuleti.Sindhu, 21/11/2024, 7:31 pm Modified By Pasupuleti.Sindhu, 21/11/2024, 7:41 pm

Initial Submission Actions

Add Existing Add New

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

New Approval Step

Action	Step Number	Name	Approval Processes: Property: Property Approval ~ Salesforce - Developer Edition	Per	Reject Behavior
Show Actions Edit Del	1	VP_Approval		user:pasupuleti.sindhu	Final Rejection

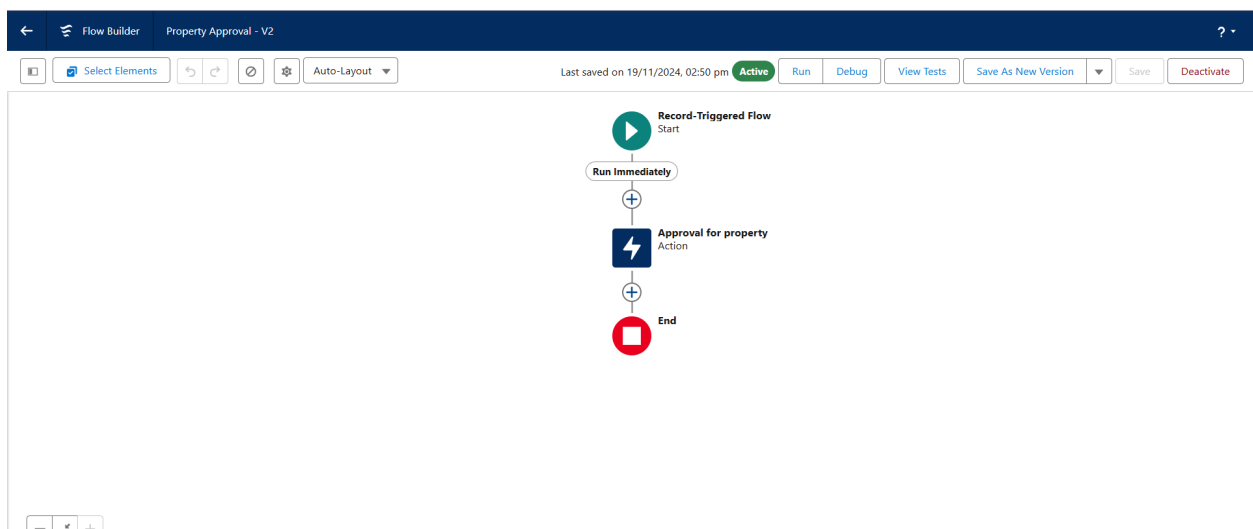
15. Activate the Approval Process.

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

A flow that can submit the records directly for approval

Activity 1

1. From Setup >> Search for Flows >> Click On New and Select “Record Trigger Flow”.
2. Select Object >> Property
3. Select “Trigger the flow when” >> “A record is created”
4. Set Entry Conditions >> “None”
5. Add a “Action” >> “Submit for Approval”
6. Give Label >> Approval for property
7. Record Id >> {!\$Record.Id}
8. Done
9. Save the Flow and Give label as “Property Approval” and “Activate”.

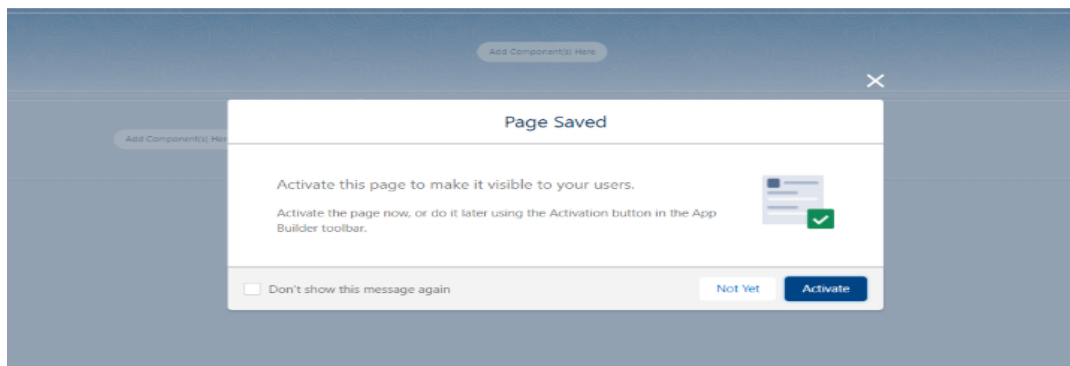


Create an App Page

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

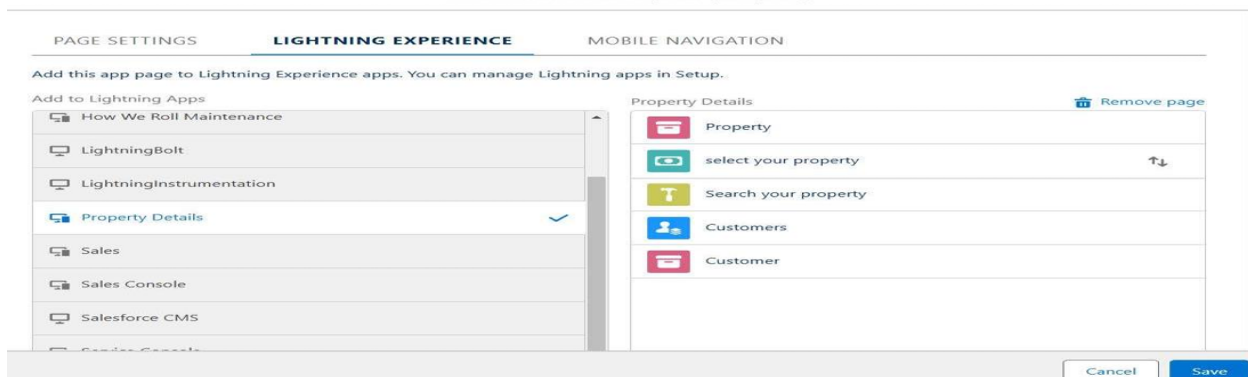
Activity 1

1. From Setup >> Go to Lightning App Builder >> Click on New >> Select App Page and Click on Next.
2. Give Label as “Search your Property” click “Next”.
3. Click “header and Left Sidebar” and Click on “Done”
4. Click on “Save ” and then click on “Activate”.



5. From Page Setting select page activation as “Activate for all Users”.
6. From Lightning Experience Click on “Property Details” and click on AddPage.

Activation: select your property



7. Then Click on “Save”

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

1. Create an Apex Class and make it aura enabled and name it “PropertHandler_LWC”

Code: -

```
public class PropertHandler_LWC{
    @AuraEnabled(cacheable=true)
    public static List<Property__c> getProperty(String type, Boolean verified){
        String verifiedStr = verified ? 'true' : 'false';
        return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c
                FROM Property__c
                WHERE Type__c = :type AND Verified__c = :verifiedStr];
    }
}
```

File Edit Debug Test Workspace Help < >

PropertyHandler_LWC.apxc

Code Coverage: None API Version: 62

1 public class PropertyHandler_LWC{
2 @AuraEnabled(cacheable=true)
3 public static List<Property__c> getProperty(String type, Boolean verified){
4 String verifiedStr = verified ? 'true' : 'false';
5 return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c
6 FROM Property__c
7 WHERE Type__c = :type AND Verified__c = :verifiedStr];
8 }
9 }]

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Re
------	-------------	-----------	------	--------	----

2. Create a Lightning Web Component in your VsCode, and (ctrl+shift +P) and click on authorize an org.
3. Enter your login id and password to authorize your org.
4. Now (ctrl+shift +P) and Create a lightning Web Component and Name it Anything you want to. (Example -)
5. In your Html File Write this code : -

Code :-

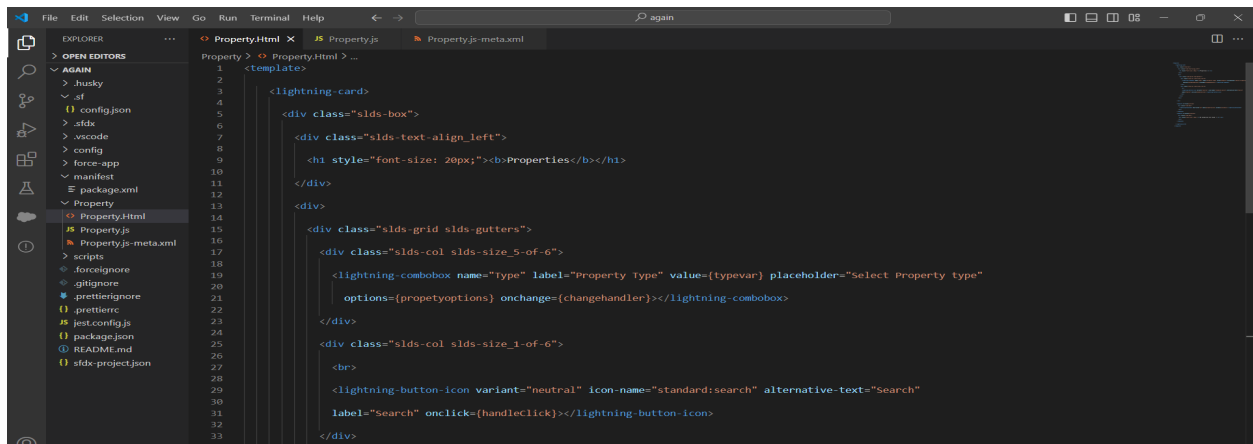
```
<template>
<lightning-card>
  <div class="slds-box">
    <div class="slds-text-align_left">
      <h1 style="font-size: 20px;"><b>Properties</b></h1>
    </div>
    <div>
      <div class="slds-grid slds-gutters">
        <div class="slds-col slds-size_5-of-6">
          <lightning-combobox name="Type" label="Property Type" value={typevar}
placeholder="Select Property type"
          options={propetyoptions} onchange={changehandler}></lightning-combobox>
        </div>
        <div class="slds-col slds-size_1-of-6">
          <br>
          <lightning-button-icon variant="neutral" icon-name="standard:search">
```

```
alternative-text="Search"
    label="Search" onclick={handleClick}></lightning-button-icon>
</div>
</div>
</div>

</div>

<template if:true={istru}>
    <div class="slds-box">
        <lightning-datatable key-field="id" data={propertylist}
columns={columns}></lightning-datatable>
    </div>
</template>
<template if:false={isfalse}>
    <div class="slds-box">
        <div style="font-size: 15px;"><b>No properties Are Found !!</b></div>
    </div>
</template>

</lightning-card>
</template>
```

6. In Your Js File Write this code :-

Code :-

```

import { LightningElement, api, track, wire } from 'lwc';
import getProperty from "@salesforce/apex/PropertyHandler_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
  typevar
  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" }
    ]
    propertyoptions = [
        { label: "Commercial", value: "Commercial" },
        { label: "Residential", value: "Residential" },
        { label: "rental", value: "rental" }

    ]
    @wire(getRecord, { recordId: "$userId", fields: ['User.Verified__c'] })
    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() {

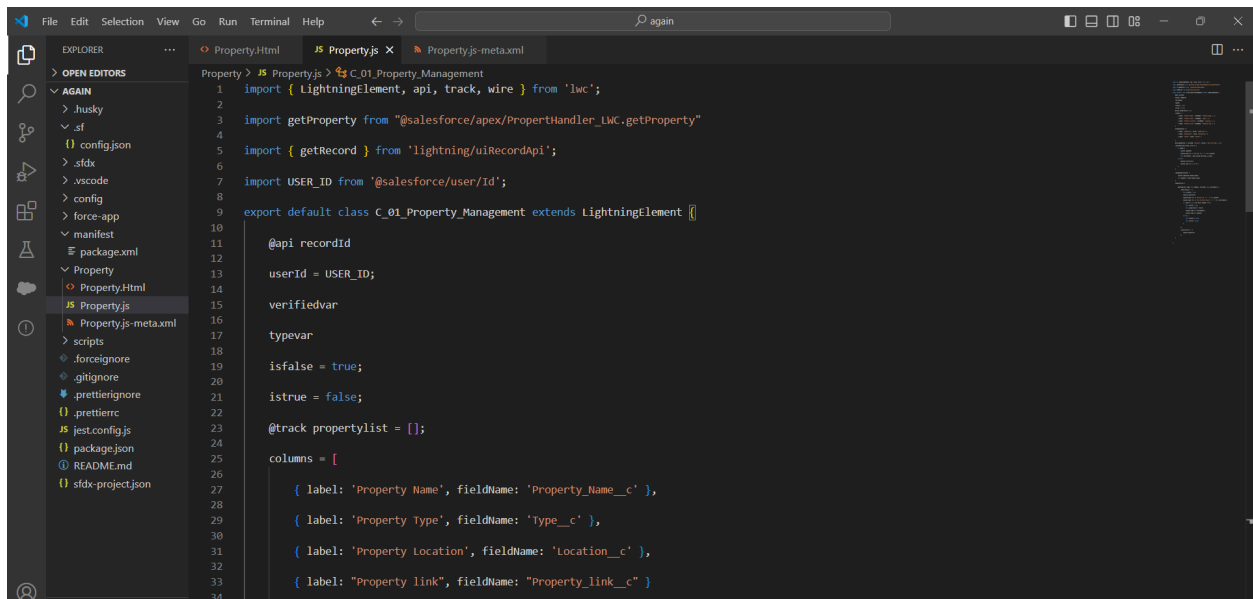
        getProperty({ type: this.typevar, verified: this.verifiedvar })
            .then((result) => {
                this.isfalse = true;
            })
    }

```

```
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;
    console.log(this.verifiedvar);
    console.log(this.typevar)
} else {
    this.isfalse = false;
    this.istrue = false;
}

})
.catch((error) => {
    console.log(error)
})
}

}
```



7. In Your metafile give your targets to deploy the component.Code :-

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
```

```
  <apiVersion>59.0</apiVersion>
```

```
  <isExposed>true</isExposed>
```

```
  <targets>
```

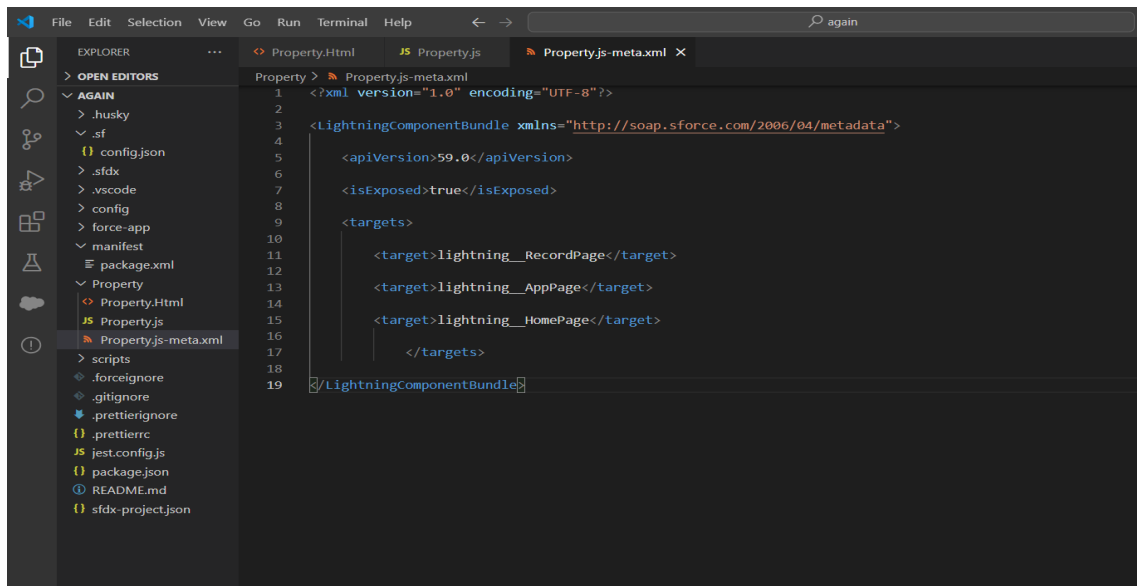
```
    <target>lightning__RecordPage</target>
```

```
    <target>lightning__AppPage</target>
```

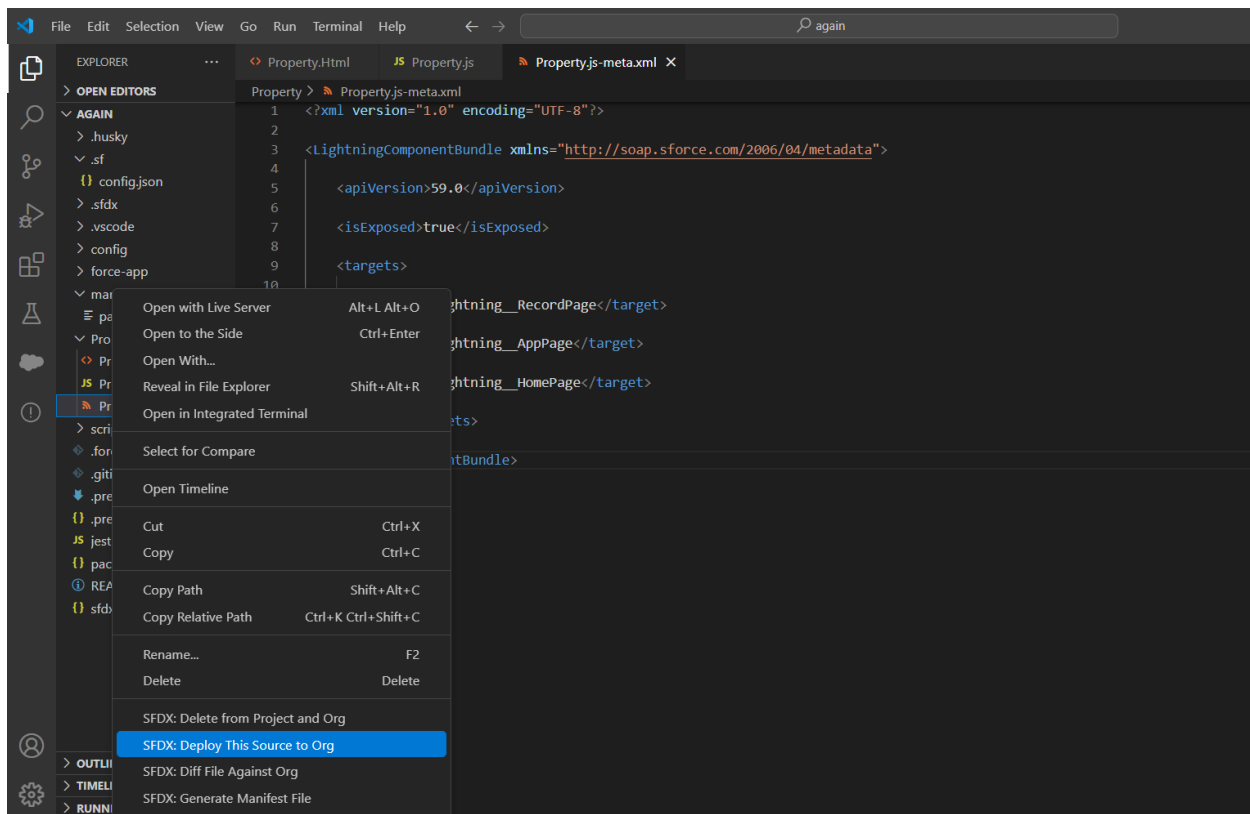
```
    <target>lightning__HomePage</target>
```

```
  </targets>
```

```
</LightningComponentBundle>
```



8. After Saving all the three Codes , Right Click and deploy this component to the org.

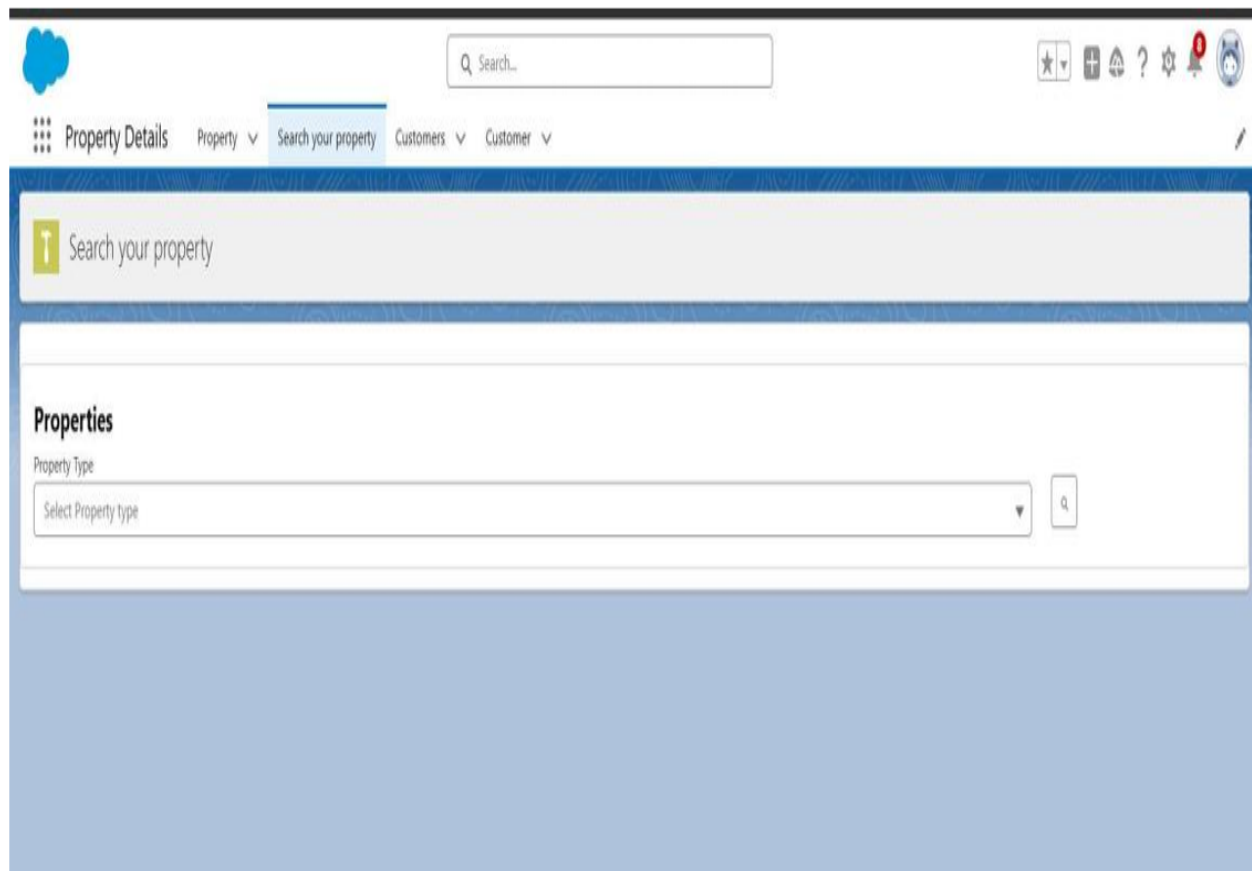


Drag this Component to your App Page

Adding the Component to your Page

Activity 1

1. From Setup >> Go to App Launcher >> Search for Property Details
2. On this Page click on gear icon and click on Edit Page
3. Drag the Component to your App Page and Save the Page.



Give Access of Apex Classes to Profiles

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

Activity 1

1. From Setup >> Search For Apex Classes >> Click on “Security” behind “PropertyHandler__LWC”.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'apex' and a list of categories: Email, Custom Code, Apex Classes, Apex Settings, Apex Test Execution, Apex Test History, Apex Triggers, Environments, Jobs, Apex Flex Queue, and Apex Jobs. The main content area is titled 'Apex Classes' and includes a search bar, a 'View' dropdown, and a table of Apex classes. The table has columns for Action, Name, Namespace Prefix, Api Version, Status, Size Without Comments, Last Modified By, and Has Trace Flags. The 'PropertyHandler__LWC' class is highlighted, and the 'Security' tab is selected, showing a list of profiles that have access to the class.

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit	Package_Test	thsecurity	56.0	Active	2,949	Pasupuleti Sindhu	11/08/2024, 8:46 pm
Edit Security	PackageRestResource	thsecurity	56.0	Active	796	Pasupuleti Sindhu	11/08/2024, 8:46 pm
Edit Security	PackageService	thsecurity	56.0	Active	720	Pasupuleti Sindhu	11/08/2024, 8:46 pm
Edit	Ping_Test	thsecurity	56.0	Active	816	Pasupuleti Sindhu	11/08/2024, 8:46 pm
Edit Security	PingRestResource	thsecurity	56.0	Active	443	Pasupuleti Sindhu	11/08/2024, 8:46 pm
Edit Del Security	PropertyHandler__LWC	thsecurity	62.0	Active	397	Pasupuleti Sindhu	19/11/2024, 4:14 pm

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'apex' and a list of categories: Email, Custom Code, Apex Classes, Apex Settings, Apex Test Execution, Apex Test History, Apex Triggers, Environments, Jobs, Apex Flex Queue, and Apex Jobs. The main content area is titled 'Apex Classes' and includes a search bar, a 'View' dropdown, and a table of Apex classes. The 'PropertyHandler__LWC' class is highlighted, and the 'Security' tab is selected, showing a list of profiles that have access to the class. The 'Security - Record 6 - PropertyHandler__LWC' record is displayed, showing the profile 'thsecurity' and the class 'PropertyHandler__LWC'.

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit	Package_Test	thsecurity	56.0	Active	2,949	Pasupuleti Sindhu	11/08/2024, 8:46 pm
Edit Security	PackageRestResource	thsecurity	56.0	Active	796	Pasupuleti Sindhu	11/08/2024, 8:46 pm
Edit Security	PackageService	thsecurity	56.0	Active	720	Pasupuleti Sindhu	11/08/2024, 8:46 pm
Edit	Ping_Test	thsecurity	56.0	Active	816	Pasupuleti Sindhu	11/08/2024, 8:46 pm
Edit Security	PingRestResource	thsecurity	56.0	Active	443	Pasupuleti Sindhu	11/08/2024, 8:46 pm
Edit Del Security	PropertyHandler__LWC	thsecurity	62.0	Active	397	Pasupuleti Sindhu	19/11/2024, 4:14 pm

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and tabs for "Setup", "Home", and "Object Manager". The left sidebar contains a search bar with "apex" entered and a list of categories: Email, Custom Code, Environments, and Jobs. Under "Custom Code", the "Apex" section is expanded, showing "Apex Exception Email", "Apex Classes", "Apex Settings", "Apex Test Execution", "Apex Test History", and "Apex Triggers". The main content area is titled "Profiles" and shows the configuration for the Apex Class "PropertyHandler_LWC". The page header indicates "Enable Profile Access for Apex Class". The main content area has a "Save" button and a "Cancel" button. Below these are two lists: "Available Profiles" and "Enabled Profiles". The "Available Profiles" list includes: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, and Customer Portal Manager Custom. The "Enabled Profiles" list includes: Customer, Manager, and System Administrator. There are "Add" and "Remove" buttons between the two lists.

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

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SETUP Profiles

Enable Profile Access for Apex Class
PropertyHandler_LWC

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: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User
- Customer Community Plus User
- Customer Community User
- Customer Portal Manager Custom

Add
Remove

Enabled Profiles

- Customer
- Manager
- System Administrator