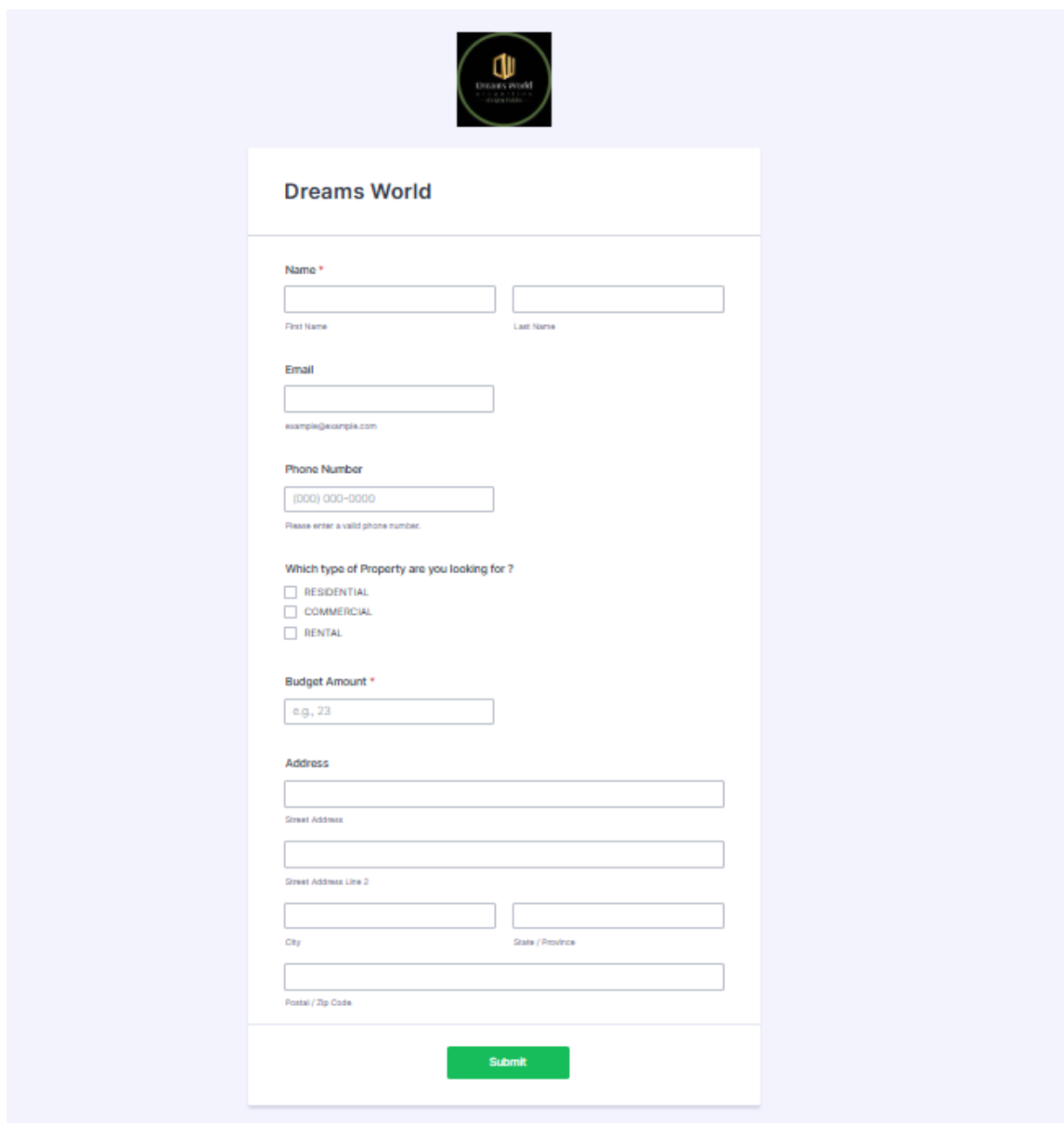**A CRM Application to Handle the Clients and their property Related Requirements**

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.

Milestone 1 :- Create a Jotform and integrate it with the org to create a record of customers automatically.

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

Activity 1

Activity 2:

Create Objects from Spreadsheet.

Directly Creating Objects from Spreadsheet in Salesforce – for customers object and property object

Create a custom object from a spreadsheet

Upload	Google Sheet	Office 365 or Drive
or Drop File Here		
Upload .xlsx or .csv		

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	* Field Labels Row	Import **3 rows** of Data? ⓘ	Record Name Field ⓘ
○ Enter manually	1	○ No, skip import	Let Salesforce Create a Default F ⬍
● Detect from row		● Yes, import data	

Fields 11 of 16 to import   ☐ Hide mapped fields

IMPORT FILE FIELD NAME		SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS ⓘ	FIELD PREVIEW
✓ Customer	✕	Customer	Text ⬍	✓	Rakesh
✓ Phone Number	✕	Phone Number	Integer ⬍	✓	788797
✓ Emial	✕	Emial	Email ⬍	✓	rakesh@gmail.com
✓ State	✕	State	Text ⬍	✓	Telangana
✓ Property Type	✕	Property Type	Text ⬍	✓	Residential

Back   Next

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	* Field Labels Row	Import **3 rows** of Data? ⓘ	Record Name Field ⓘ
○ Enter manually	1	○ No, skip import	Let Salesforce Create a Default F ⬍
● Detect from row		● Yes, import data	

Fields 4 of 4 to import   ☐ Hide mapped fields

IMPORT FILE FIELD NAME		SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS ⓘ	FIELD PREVIEW
✓ Property Name	✕	Property Name	Text ⬍	✓	Lotus Appartments
✓ Type	✕	Type	Text ⬍	✓	Residential
✓ Location	✕	Location	Text ⬍	✓	hydeerabad
✓ Verified	✕	Verified	Text ⬍	✓	checked

Integrate Jotform with Salesforce Platform

In this Milestone we are going to integrate jotform with Salesforce

Activity 3:

Create Roles

Create Roles as per business requirement

Activity 4:

Create a Property Details App

An App where the objects will be displayed

Activity 5:

App Settings

App Details & Branding

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 Branding

* App Name ⓘ

Property Details

* Developer Name ⓘ

Property_Details

Description ⓘ

Enter a description...

Image ⓘ

⬆ Upload

Primary Color Hex Value ⓘ

#0070D2

Org Theme Options

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

App Launcher Preview

PD   Property Details

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for deskto in a format that the item doesn't support.

Available Items

Type to filter list...

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods
- Assets
- Async Operation Logs
- Authorization Form
- Authorization Form Consent

Selected Items

- Customer
- Property
- Search your Property

Create Profiles

Create profiles as per business requirement

Activity 6: Customer

Setup Home Object Manager ∨

Q profile

∨ Users
  Profiles

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

SETUP
Profiles

Profile Edit
Customer

Set the permissions and page layouts for this profile.

Profile Edit

Save | Save & New | Cancel

Name: Customer
User License: Salesforce Platform
Description:

Custom Profile ✓

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	☐	○	Property Details (Property_Details)	☑	○
App Launcher (standard__AppLauncher)	☐	○	WDC (standard__Work)	☐	○
Platform (standard__Platform)	☑	●			

Service Provider Access

Tab Settings
☐ Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On	Inventory Item Reservations	Tab Hidden ∨
Accounts	Default On ∨	Inventory Reservations	Tab Hidden ∨
All Sites	Tab Hidden ∨	Invoices	Tab Hidden ∨
Alternative Payment Methods	Tab Hidden ∨	Labels	Default On ∨
Analytics	Tab Hidden ∨	Leads	Tab Hidden ∨
Analytics	Default On ∨	Libraries	Tab Hidden ∨
App Launcher	Default On ∨	Lightning Bolt Solutions	Default On ∨
Appointment Categories	Default Off ∨	Lightning Usage	Default On ∨
Appointment Invitations	Default Off ∨	List Emails	Tab Hidden ∨
Approval Requests	Default On ∨	Location Groups	Default On ∨
Assets	Tab Hidden ∨	Locations	Default On ∨
Async Operation Logs	Default On ∨	Location Shipping Carrier Methods	Tab Hidden ∨
			Default On ∨

Setup Home Object Manager ∨

Q profile

∨ Users
  Profiles

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

SETUP
Profiles

Lightning Login User ☐
Manage Articles ☐

Hawley Team's Dashboards ☐
Waive Multi-Factor Authentication for Exempt Users ☐

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? ⓘ

	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Accounts	☐	☐	☐	☐	☐	☐	Contact Point Phones	☐	☐	☐	☐	☐	☐
Addresses	☐				☐		Contact Point Type Consents	☐	☐	☐	☐	☐	☐
Assets	☐	☐	☐	☐			Customers	☐	☐	☐	☐	☐	☐
Authorization Forms	☐	☐	☐	☐	☐	☐	D&B Companies	☐					
Authorization Form Consents	☐	☐	☐	☐	☐	☐	Data Use Legal Bases	☐	☐	☐	☐	☐	☐
Authorization Form Data Uses	☐	☐	☐	☐	☐	☐	Data Use Purposes	☐	☐	☐	☐	☐	☐
Authorization Form Texts	☐	☐	☐	☐	☐	☐	Documents	☐	☐	☐	☐	☐	☐
Background Operations	☐						Engagement Channel Types	☐	☐	☐	☐	☐	☐
Business Brands	☐	☐	☐	☐	☐	☐	Ideas	☐	☐				
Communication Subscriptions	☐	☐	☐	☐	☐	☐	Individuals	☐	☐	☐	☐	☐	☐
Communication Subscription Channel Types	☐	☐	☐	☐	☐	☐	Labels	☐	☐	☐	☐	☐	☐
Communication Subscription Consents	☐	☐	☐	☐	☐	☐	Locations	☐				☐	
Communication Subscription Timings	☐	☐	☐	☐	☐	☐	Party Consents	☐	☐	☐	☐	☐	☐
Contacts	☐	☐	☐	☐	☐	☐	Push Topics	☐	☐	☐	☐		
Contact Point Addresses	☐	☐	☐	☐	☐	☐	Sellers	☐	☐	☐	☐	☐	☐
Contact Point Consents	☐	☐	☐	☐	☐	☐	Streaming Channels	☐	☐	☐	☐		
Contact Point Emails	☐	☐	☐	☐	☐	☐	User External Credentials	☐	☐	☐	☐	☐	☐

Custom Object Permissions

	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Customer	☐	☐	☐	☐	☐	☐	Property	☑	☐	☐	☐	☑	☐
Enhancement Requests	☐	☐	☐	☐	☐	☐							

Manager:

Setup Home Object Manager ∨

Q profile

∨ Users
  Profiles

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

SETUP
Profiles

Profile Edit
Manager

Set the permissions and page layouts for this profile.

Profile Edit

Save | Save & New | Cancel

Name: Manager
User License: Salesforce Platform
Description:

Custom Profile ✓

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	☐	○	Property Details (Property_Details)	☑	○
App Launcher (standard__AppLauncher)	☐	○	WDC (standard__Work)	☐	○
Platform (standard__Platform)	☑	●			

Service Provider Access

Tab Settings
☐ Overwrite users' personal tab customizations

Standard Tab Settings

Home	Default On	Inventory Item Reservations	Tab Hidden ∨
Accounts	Default On ∨	Inventory Reservations	Tab Hidden ∨
All Sites	Tab Hidden ∨	Invoices	Tab Hidden ∨
Alternative Payment Methods	Tab Hidden ∨	Labels	Default On ∨
Analytics	Tab Hidden ∨	Leads	Tab Hidden ∨
Analytics	Default On ∨	Libraries	Tab Hidden ∨
App Launcher	Default On ∨	Lightning Bolt Solutions	Default On ∨
Appointment Categories	Default On ∨	Lightning Usage	Default On ∨
Appointment Invitations	Default Off ∨	List Emails	Tab Hidden ∨
Approval Requests	Default On ∨	Location Groups	Default On ∨
Assets	Tab Hidden ∨	Locations	Default On ∨
Async Operation Logs	Default On ∨	Location Shipping Carrier Methods	Tab Hidden ∨
			Default On ∨

javascript:srcUp(%27%2F00edM000008e9pZ%2Fe%3FretURL%3D%252F00e%253Ffcf%253D008dM00000Ke5H0%2526rolodexIndex%253D12%2526page%253D1%2526isdtp%253Dp1%26isdtp%3Dp1%27);

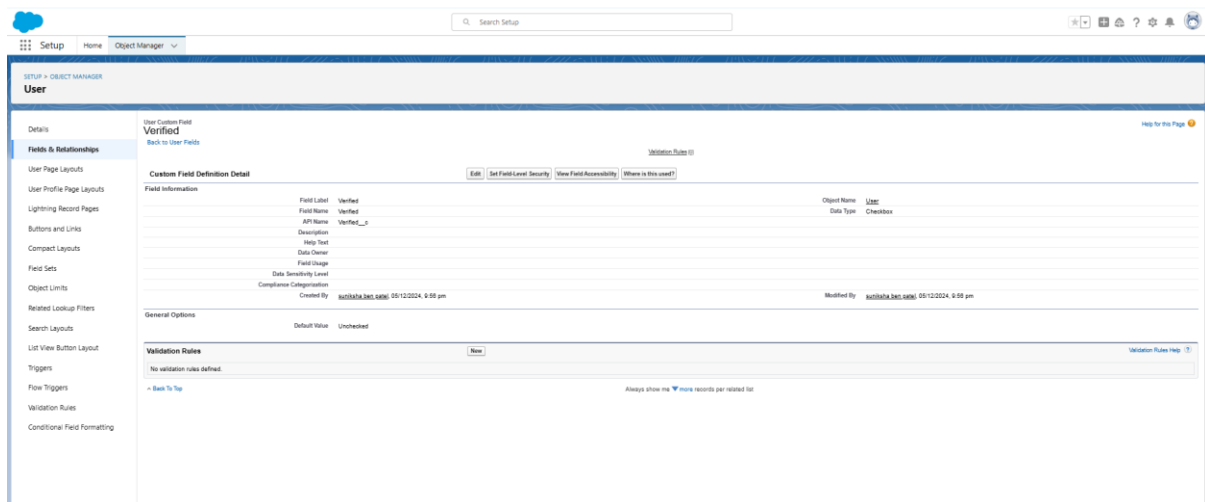**Create a Check Box field on user**

Create Field on the User as per the business requirement.
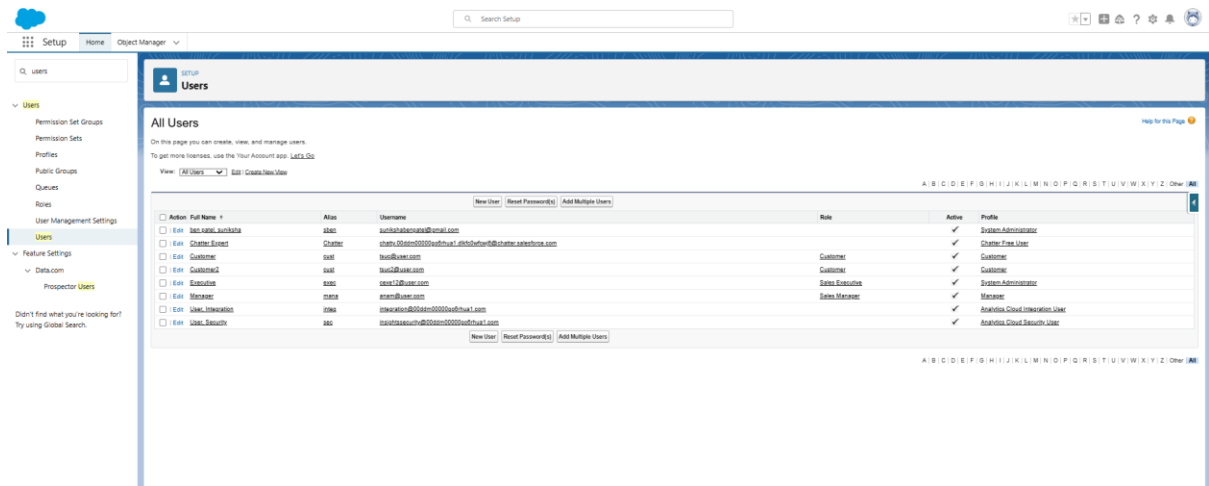
Acitivity-7:

Create Users

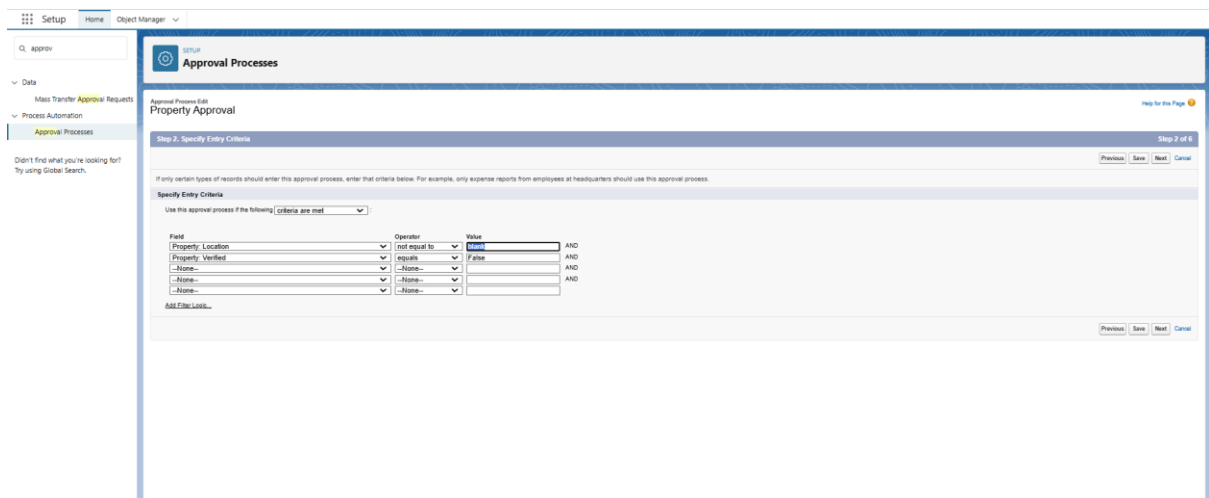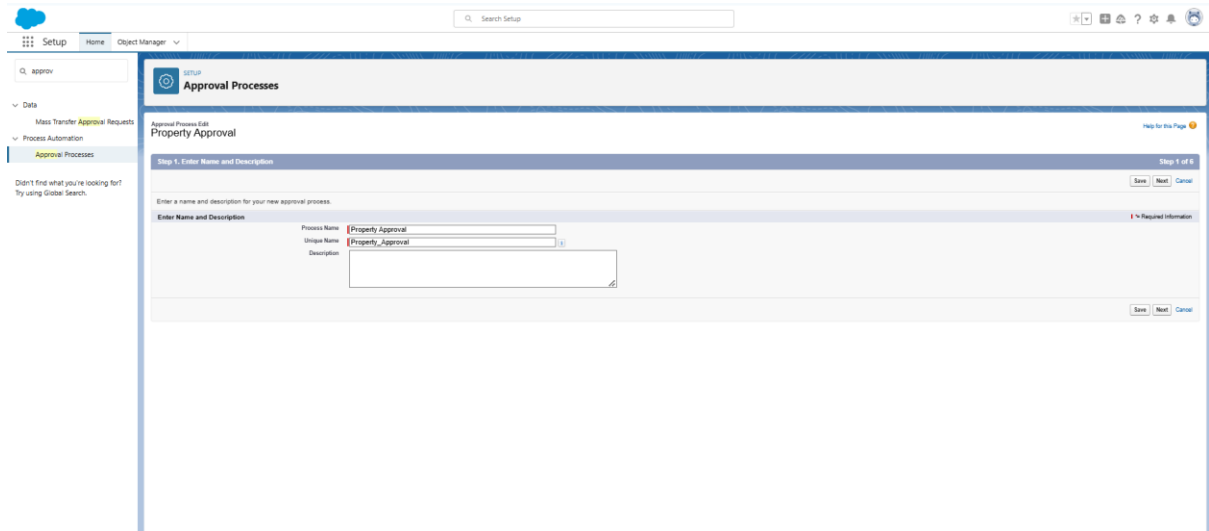**Create three different users with three different Roles and profiles as we have mentioned above.**

Acitivity-8:

Create an Approval Process for Property Object

An Approval process to approve or reject the records as according

Acitivity-9:

Setup — Home — Object Manager

Approval Processes (Step 3)

SETUP
Approval Processes

Approval Process Edit
Property Approval

Step 3. Specify Approver Field and Record Editability Properties

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By   Manager ▾ [i]
Use Approver Field of Property Owner   ☐

Record Editability Properties

○ Administrators **ONLY** can edit records during the approval process.
● Administrators **OR** the currently assigned approver can edit records during the approval process.

Approval Processes (Step 5)

SETUP
Approval Processes

Approval Process Edit
Property Approval

Help for this Page

Step 5. Select Fields to Display on Approval Page Layout   Step 5 of 6

Previous | Save | Next | Cancel

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

Available Fields:
Created By
Last Modified By
Verified

Selected Fields:
Property
Owner
Property Name
Location
Type

Add / Remove / Up / Down

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. [i]

Previous | Save | Next | Cancel

Approval Processes (Step 6)

SETUP
Approval Processes

Approval Process Edit
Property Approval

Help for this Page

Step 6. Specify Initial Submitters   Step 6 of 6

Previous | Save | Cancel

Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.

Initial Submitters

Submitter Type   Search: Owner ▾   for: [____] Find

Available Submitters:
--None--

Allowed Submitters:
Role: Sales Manager
Property Owner

Add / Remove

Submission Settings
☐ Allow submitters to recall approval requests

Previous | Save | Cancel

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

A flow that can submit the records directly for approval

Acitivity-10:
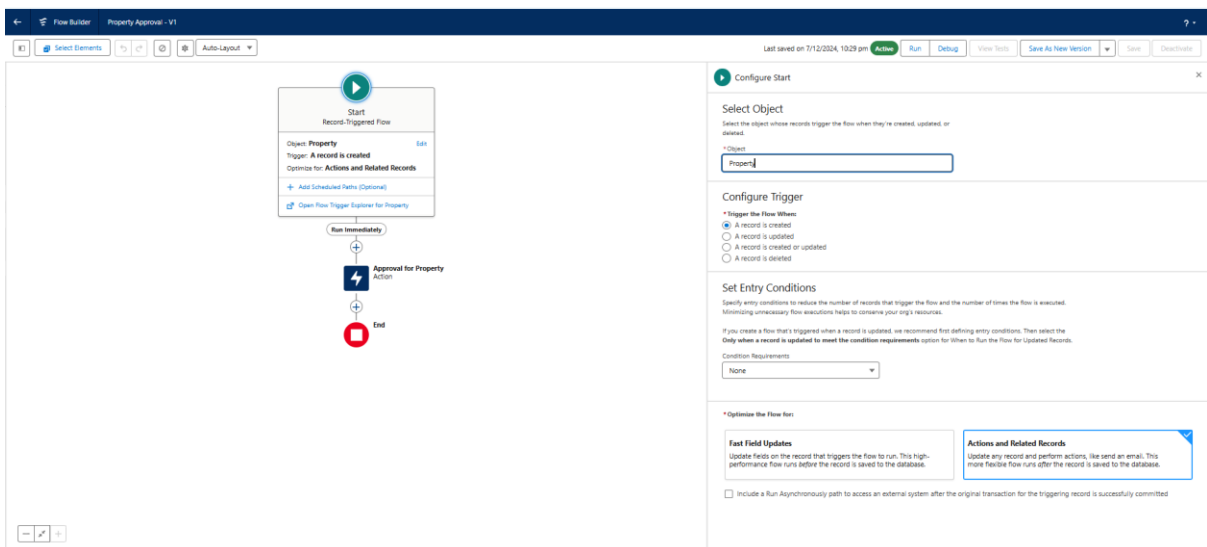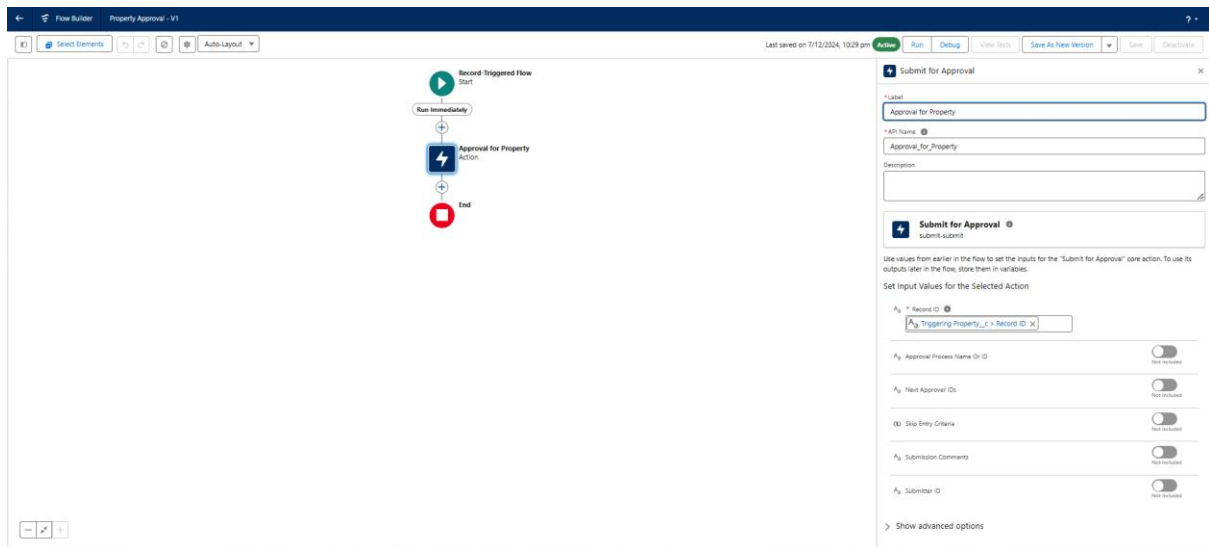
Create an App Page

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

Activity-11:
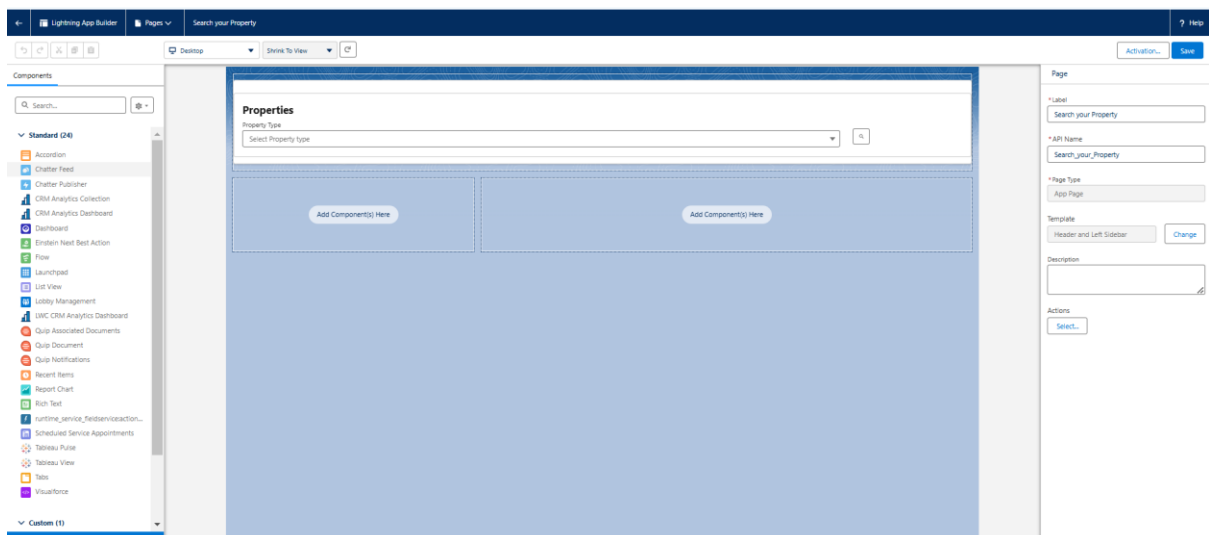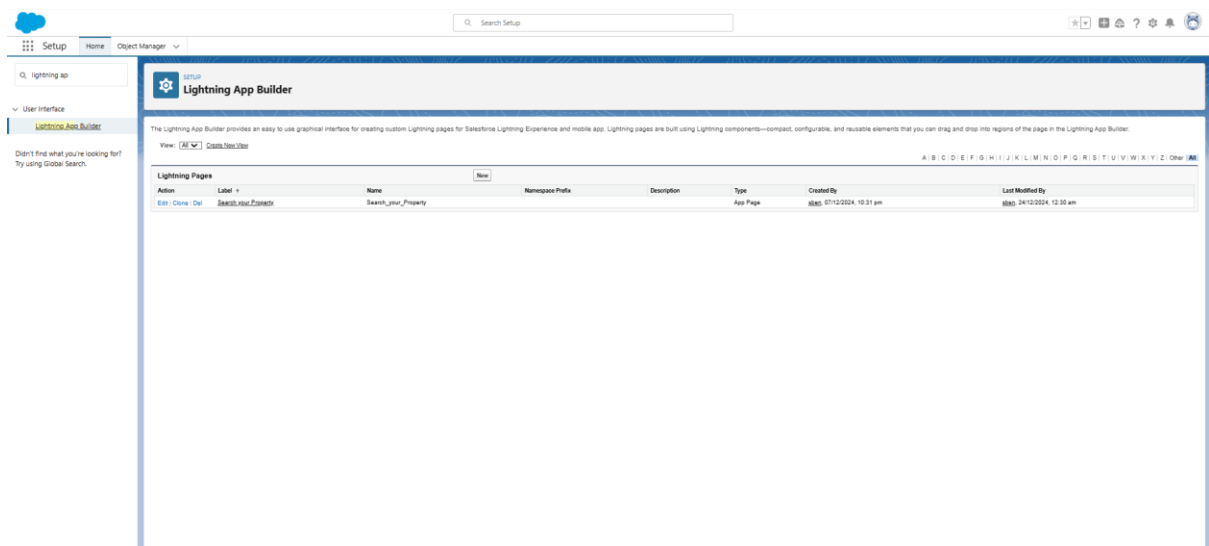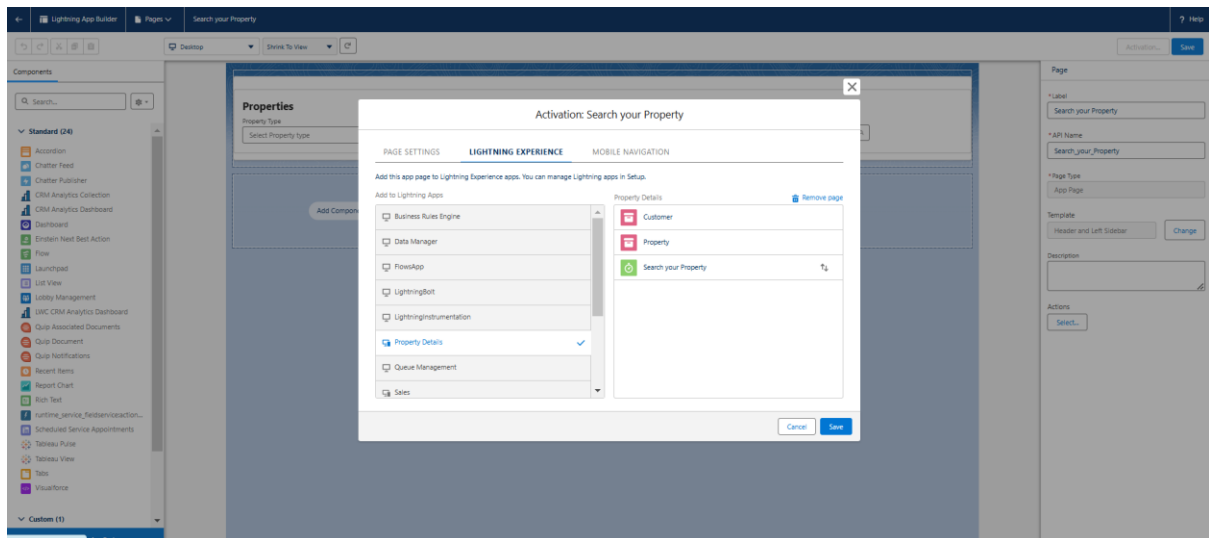
Create a LWC Component

- **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"**

Acitivity-12:

```apex
public class PropertHandler_LWC {
    @AuraEnabled(cacheable=true)
    public static List<Property__c> getProperty(String type, Boolean verified) {
        // Use 'true' or 'false' strings for comparison if Verified__c is a String
        String verifiedString = 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 = :verifiedString];
    }
}
```

```html
<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={istrue}>

            <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>
```
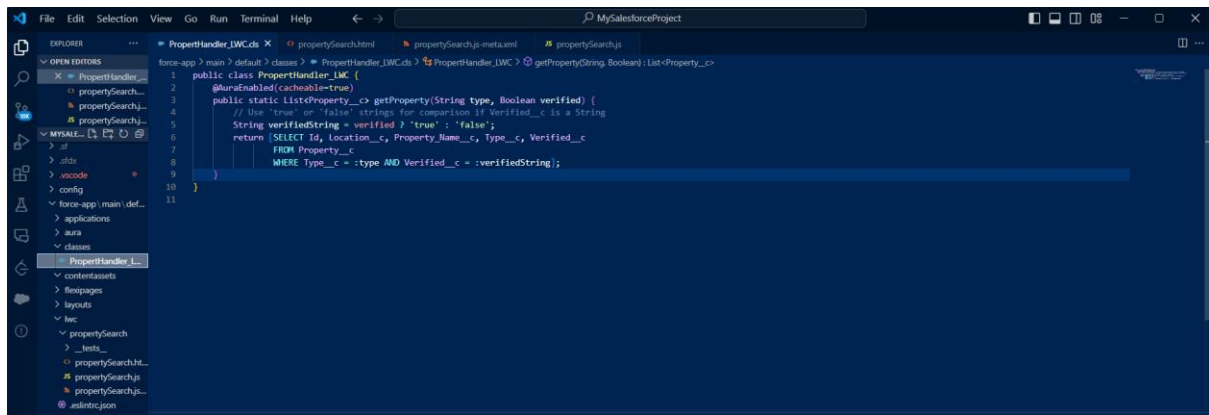
File　Edit　Selection　View　Go　Run　Terminal　Help

EXPLORER ...

OPEN EDITORS
- PropertHandler_...
- propertySearch....
- × propertySearch.j...
- JS propertySearch.j...

MYSALESFORCEPROJECT
- .husky
- .sf
- .sfdx
- .vscode
- config
- force-app\main\def...
  - applications
  - aura
  - classes
    - PropertHandler_L...
  - contentassets
  - flexipages
  - layouts
  - lwc
    - propertySearch
      - __tests__
      - propertySearch.ht...
      - JS propertySearch.js
      - propertySearch.js...
  - .eslintrc.json
  - J jsconfig.json
- objects

PropertHandler_LWC.cls　　propertySearch.html　　propertySearch.js-meta.xml ×　JS propertySearch.js

force-app > main > default > lwc > propertySearch > propertySearch.js-meta.xml

```xml
1    <?xml version="1.0" encoding="UTF-8"?>
2    <LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
3        <apiVersion>59.0</apiVersion>
4        <isExposed>true</isExposed>
5        <targets>
6            <target>lightning__RecordPage</target>
7            <target>lightning__AppPage</target>
8            <target>lightning__HomePage</target>
9        </targets>
10   </LightningComponentBundle>
11
```

PropertHandler_LWC.cls   `<>` propertySearch.html   📄 propertySearch.js-meta.xml   **JS propertySearch.js ×**

force-app › main › default › lwc › propertySearch › JS propertySearch.js › 🔩 C_01_Property_Management › ⬡ handleClick

```javascript
1   import { LightningElement, api, track, wire } from 'lwc';
2
3   import getProperty from "@salesforce/apex/PropertHandler_LWC.getProperty"
4
5   import { getRecord } from 'lightning/uiRecordApi';
6
7   import USER_ID from '@salesforce/user/Id';
8
9   export default class C_01_Property_Management extends LightningElement {
10
11      @api recordId
12
13      userId = USER_ID;
14
15      verifiedvar
16
17      typevar
18
19      isfalse = true;
20
21      istrue = false;
22
23      @track propertylist = [];
24
25      columns = [
26
27          { label: 'Property Name', fieldName: 'Property_Name__c' },
28
29          { label: 'Property Type', fieldName: 'Type__c' },
30
31          { label: 'Property Location', fieldName: 'Location__c' },
32
33          { label: "Property link", fieldName: "Property_link__c" }
34
35      ]
36
37      propetyoptions = [
38
39          { label: "Commercial", value: "Commercial" },
40
41          { label: "Residential", value: "Residential" },
42
43          { label: "rental", value: "rental" }
44
45
```

17

EXPLORER ···

● PropertHandler_LWC.cls   ◇ propertySearch.html   ⟩ propertySearch.js-meta.xml   JS propertySearch.js ✕

⌄ OPEN EDITORS
   ● PropertHandler_...
   ◇ propertySearch....
   ⟩ propertySearch.j...
   ✕ JS propertySearch.j...
⌄ MYSALESFORCEPROJECT
   ⟩ .husky
   ⟩ .sf
   ⟩ .sfdx
   ⟩ .vscode   ●
   ⟩ config
   ⌄ force-app\main\def...
      ⟩ applications
      ⟩ aura
      ⌄ classes
         ● PropertHandler_L...
      ⌄ contentassets
      ⟩ flexipages
      ⟩ layouts
      ⌄ lwc
         ⌄ propertySearch
            ⟩ __tests__
            ◇ propertySearch.ht...
            JS propertySearch.js
            ⟩ propertySearch.js...
      ● .eslintrc.json
      J jsconfig.json
   ⟩ objects
   ⟩ permissionsets
   ⟩ staticresources
   ⟩ tabs
   ⟩ triggers
   ⟩ scripts
   ◆ .forceignore
   ≡ .gitignore
   ≡ .prettierignore
   ≡ .prettierrc

⟩ OUTLINE
⟩ TIMELINE
⟩ RUNNING TASKS
⟩ JAVA PROJECTS

force-app ⟩ main ⟩ default ⟩ lwc ⟩ propertySearch ⟩ JS propertySearch.js ⟩ 😤 C_01_Property_Management ⟩ ⊕ handleClick

```javascript
 9    export default class C_01_Property_Management extends LightningElement {
37        propetyoptions = [

46        ]
47
48        @wire(getRecord, { recordId: "$userId", fields: ['User.Verified__c'] })
49
50        recordFunction({ data, error }) {
51
52            if (data) {
53
54                console.log(data)
55
56                console.log("This is the User Id ---> "+this.userId);
57
58                this.verifiedvar = data.fields.Verified__c.value;
59
60            } else {
61
62                console.error(error)
63
64                console.log('this is error')
65
66            }
67
68        }
69
70
71        changehandler(event) {
72
73            console.log(event.target.value);
74
75            this.typevar = event.target.value;
76
77        }
78
79        handleClick() {
80
81
82            getProperty({ type: this.typevar, verified: this.verifiedvar })
83
84                .then((result) => {
85
86                    this.isfalse = true;
87
88                    console.log(result)
```

18

Drag this Component to your App Page
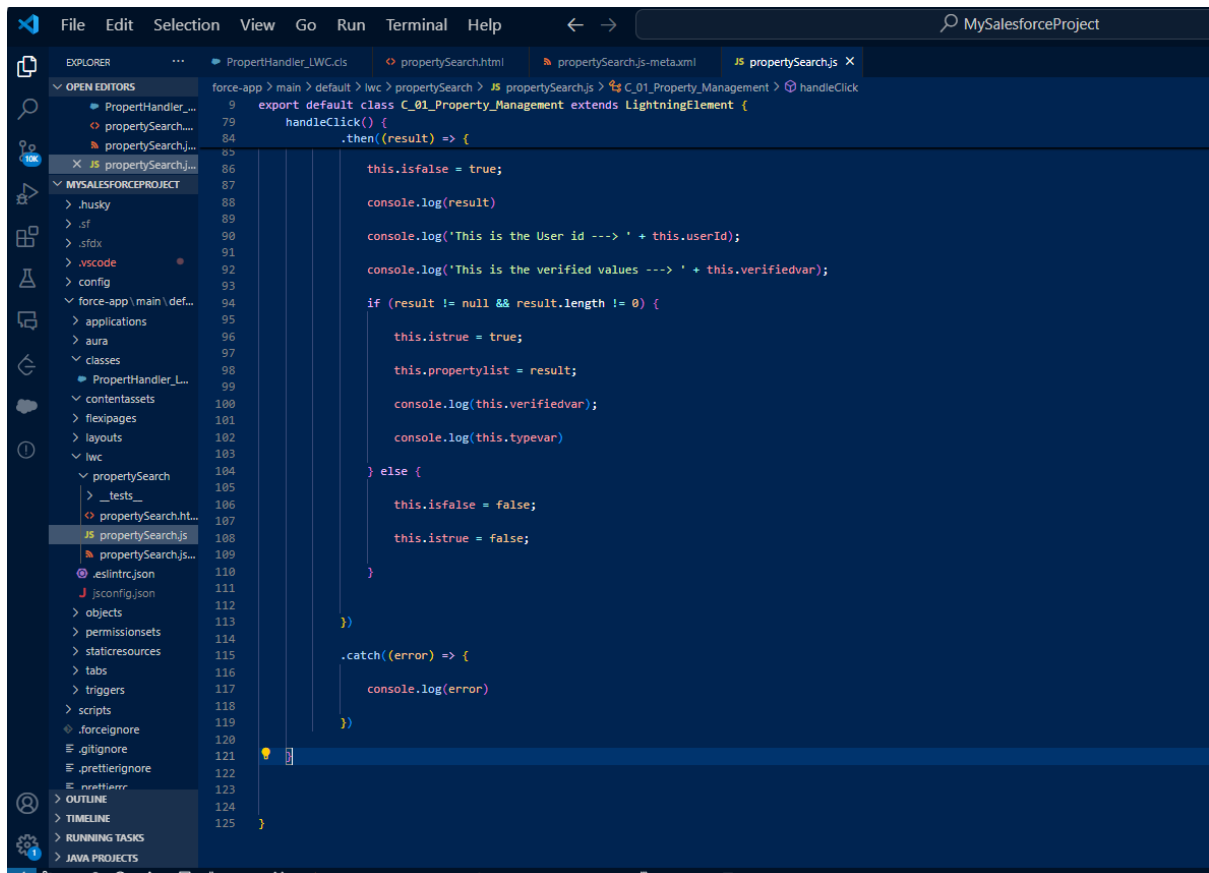
Adding the Component to your Page

Acitivity-13:
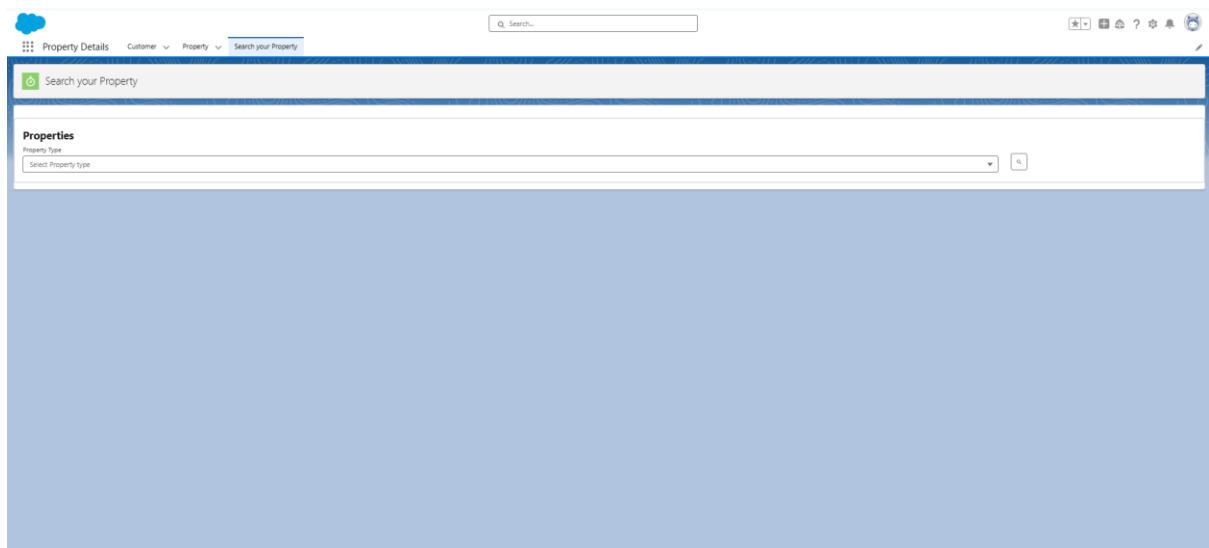
Give Access of Apex Classes to Profiles

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

Activity-14:

Thank You !!!