

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

## TEAM MEMBERS

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## MODULE 1

Screenshot of a Jotform survey titled "Phone Number" showing a validation error for a non-existent phone number.

The survey fields include:

- Phone Number: (000) 000-0000 (Error: Please enter a valid phone number.)
- Which type of Property are you looking for?
  - RESIDENTIAL
  - COMMERCIAL
  - RENTAL
- Budget Amount \*: e.g., 23
- Address: Street Address

Jotform logo and "Create your own Jotform" button are visible at the bottom.

  

Screenshot of a Jotform survey titled "Dreams World" featuring a Dreams World logo and two input fields for Name (First Name and Last Name) and Email.

The survey fields include:

- Dreams World logo
- Name \*:
  - First Name
  - Last Name
- Email

Jotform logo and "Create your own Jotform" button are visible at the bottom.

The screenshot shows a Jotform-based address entry form. The form consists of several input fields:

- A large text input field labeled "Address".
- A smaller text input field labeled "Street Address".
- A second smaller text input field labeled "Street Address Line 2".
- Two side-by-side text input fields for "City" and "State / Province".
- A final text input field labeled "Postal / Zip Code".

At the bottom center of the form is a green "Submit" button.

At the very bottom of the browser window, there is a dark footer bar with the Jotform logo on the left, a "Now create your own Jotform - It's free!" message in the center, and a "Create your own Jotform" button on the right.

## MODULE 2

The screenshot shows the Salesforce Setup interface, specifically the Object Manager section for the "Customer" object.

**Setup Path:** SETUP > OBJECT MANAGER  
**Object Name:** Customer

**Details Panel:**

Details	
Description	
API Name	Customer_c
Custom	✓
Singular Label	Customer
Plural Label	Customer
<a href="#">Edit</a> <a href="#">Delete</a>	

**Left Sidebar:**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

The screenshot shows the Salesforce Setup interface for the 'Object Manager'. The left sidebar lists various object settings like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main 'Details' tab for the 'Property' object is selected. It displays the API Name as 'Property\_c', a Custom object. The Singular Label is 'Property' and the Plural Label is also 'Property'. On the right, there are checkboxes for enabling Reports, Activities, and Field History, all of which are checked. Deployment status is set to 'Deployed'. The bottom status bar shows the date as 22-11-2024 and the time as 22:21.

## MODULE 3

The screenshot shows the Salesforce Setup interface for the 'Roles' page. The left sidebar has a search bar and links to Users, Feature Settings, Sales, Service, Case Teams, and Case. The 'Roles' link is selected. The main area shows a hierarchical tree of roles under 'VP, North American Sales': 'Director, Channel Sales', 'Channel Sales Team', 'Director, Direct Sales', 'Eastern Sales Team', 'Western Sales Team', 'Sales Representative', 'Sales Executive', and 'Sales Manager'. Each role has 'Edit | Del | Assign' options. The bottom status bar shows the date as 22-11-2024 and the time as 22:25.

## MODULE 4

The screenshot shows the Lightning App Builder interface. The top navigation bar includes tabs for "Lightning App Builder", "App Settings", "Pages", and "Property Details". The main area is titled "Navigation Items" and contains two panels: "Available Items" and "Selected Items". The "Available Items" panel lists various navigation items like Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, and Appointment Invitations. The "Selected Items" panel contains three items: "Customer", "Property", and "Search your Property". A search bar at the top of the list allows filtering.

## MODULE 5

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for "Setup", "Home", and "Object Manager". The main content area is titled "Profiles" and shows a "Customer" profile. The profile details include Name (Customer), User License (Salesforce Platform), Description, Created By (Thoufeeq A), and Modified By (Thoufeeq A). Below the profile detail, there is a section for "Page Layouts" and "Standard Object Layouts". The bottom of the screen shows the Windows taskbar with various application icons.

The screenshot shows the Salesforce Setup interface with the URL [governmentcollegeoftech128-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000002Wj7](https://governmentcollegeoftech128-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000002Wj7). The page title is "Profiles". The left sidebar shows "Users" and "Profiles" under the "Profiles" section. The main content area displays the "Profile Manager" section with the following details:

Name	Manager
User License	Salesforce Platform
Description	
Created By	Thoufeeq A, 05/11/2024, 3:42 pm
Modified By	Thoufeeq A, 05/11/2024, 4:50 pm

Below this, there is a "Page Layouts" section titled "Standard Object Layouts". The system tray at the bottom shows various icons and the date/time as 22-11-2024 22:35.

## MODULE 6

The screenshot shows the Salesforce Setup interface with the URL [governmentcollegeoftech128-dev-ed.lightning.force.com/lightning/setup/ObjectManager/User/FieldsAndRelationships/00NN0000087p61/v...](https://governmentcollegeoftech128-dev-ed.lightning.force.com/lightning/setup/ObjectManager/User/FieldsAndRelationships/00NN0000087p61/v...). The page title is "User". The left sidebar shows "Details" and "Fields & Relationships". The main content area displays the "Custom Field Definition Detail" for the "Verified" field:

Field Label	Verified
Field Name	Verified
API Name	Verified__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Below this, there is a "Field Information" section with the following details:

Object Name	User
Data Type	Checkbox

The "Created By" and "Modified By" fields both show "Thoufeeq A, 05/11/2024, 3:49 pm". The system tray at the bottom shows various icons and the date/time as 22-11-2024 22:38.

## MODULE 7

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main area displays the 'User Executive' profile. The 'User Detail' section includes fields for Name (Executive), Alias (exec), Email (exec@gmail.com [Verify]), Username (exectauf@gmail.com), Nickname (exectauf), Title, Company, Department, Division, Address, Role (Sales Executive), User License (Salesforce), Profile (System Administrator), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), and Site.com Contributor (unchecked). A 'User Profile-help for this Page' link is visible at the top right.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main area displays the 'User Manager' profile. The 'User Detail' section includes fields for Name (Manager), Alias (mana), Email (mana@gmail.com [Verify]), Username (manag@tauf.com), Nickname (taufmanag), Title, Company, Department, Division, Role (Sales Manager), User License (Salesforce Platform), Profile (Manager), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), and Site.com Contributor (unchecked). A 'User Profile-help for this Page' link is visible at the top right.

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with a search bar and sections for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The 'Users' section is currently selected. The main content area is titled 'User Detail' for a user named 'Customer'. The user's details include:

Name	Customer	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	custo@gmail.com [Verify]	Profile	Customer
Username	custo@tauf.com	Active	<input checked="" type="checkbox"/>
Nickname	tauf	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>

At the top right of the main content area, there's a link to 'User ProfileHelp for this Page'.

This screenshot is nearly identical to the one above, showing the 'User Detail' page for a user named 'Customer2'. The user's details are as follows:

Name	Customer2	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	custo2@gmail.com [Verify]	Profile	Customer
Username	custo2@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	tauf2cust	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>

## MODULE 8

The screenshot shows the Salesforce Setup interface. On the left, a sidebar lists various setup categories like Lead Processes, Sales, Service, Entitlement Management, Support Processes, Process Automation, and Approval Processes. The Approval Processes category is selected and highlighted in blue. The main content area is titled "Approval Processes" and shows a specific process named "Property: Property Approval". The "Process Definition Detail" section contains the following information:

Field	Value
Process Name	Property Approval
Unique Name	Property_Approval
Description	(Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS False)
Record Editability	Administrator OR Current Approver
Approval Assignment Email Template	Initial Submitters
Created By	Property Owner, Role_Sales Manager
Created By	Thoufeeq A, 12/11/2024, 10:05 pm
Modified By	Thoufeeq A, 12/11/2024, 10:05 pm

Below the detail section, there are buttons for "Initial Submission Actions" (Add Existing, Add New), a toolbar with various icons, and a system status bar at the bottom.

## MODULE 9

The screenshot shows the Salesforce Flow Builder interface. The top navigation bar indicates the current flow is "Property Approval - V1". The main workspace displays a flow diagram starting with a "Start Record-Triggered Flow" element. This element is configured for the "Property" object and triggers when "A record is created". The "Run Immediately" button is active. Below this, an "Approval for property" action is connected. The flow builder interface includes toolbars for selecting elements, running tests, saving versions, and managing the flow's state (Active, Run, Debug). The system status bar at the bottom shows the date and time as 22-11-2024 23:03.

## MODULE 10

The screenshot shows the Salesforce Lightning App Builder interface. The left sidebar has a search bar with 'lightning app' and a 'User Interface' section with 'Lightning App Builder' selected. The main area displays a page titled 'Search\_your\_Property'. The page detail shows 'Name' as 'Search\_your\_Property' and 'Label' as 'Search your Property'. Below this is a section for 'Assignments By App' which is currently empty. The bottom status bar shows various icons and the date '22-11-2024'.

## MODULE 11

The screenshot shows the Salesforce Apex Classes interface. The left sidebar has a search bar with 'apex' and sections for 'Email', 'Custom Code' (with 'Apex Classes' selected), 'Apex Triggers', 'Environments', 'Jobs', 'Apex Flex Queue', and 'Apex Jobs'. The main area displays an Apex class named 'PropertHandler\_LWC'. The class detail shows 'Name' as 'PropertHandler\_LWC', 'Status' as 'Active', and 'Code Coverage' as '0% (0/2)'. The code body tab shows the following Apex code:

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

The bottom status bar shows various icons and the date '22-11-2024'.

## MODULE 12

The screenshot shows a Salesforce Lightning interface. At the top, there are tabs for 'Property Details', 'Customer', 'Property', and a search bar. Below this is a header with a cloud icon, a search bar, and various navigation icons. The main content area displays a 'Recently Viewed' list for the 'Customer' object. The list has one item: '1 item • Updated a few seconds ago'. The columns include Customer, Custo..., Phone Number, Email, State, Property Type, Budget..., Street ..., Street ..., and City. The single item listed is 'fig tauf (689) 506-8545 thouf@gmail.com cxvc RESIDENTIAL 654 gvcf vc vb'. At the bottom of the screen, there is a taskbar with various application icons and system status indicators.

## MODULE 13

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Profiles | Salesforce', 'Student', 'nmproject/Workforce Administ...', 'Google Password Manager', and other browser tabs. The main content area is titled 'Profiles' and shows a 'Setup' section. A search bar at the top left contains 'apex classes'. On the left, there's a sidebar with 'Custom Code' and 'Apex Classes' selected. The main panel shows a modal titled 'Enable Profile Access for Apex Class PropertHandler\_LWC'. It lists 'Available Profiles' on the left and 'Enabled Profiles' on the right. 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. The 'Enabled Profiles' list includes: Customer Manager and System Administrator. There are 'Add' and 'Remove' buttons between the two lists. At the bottom of the screen, there is a taskbar with various application icons and system status indicators.