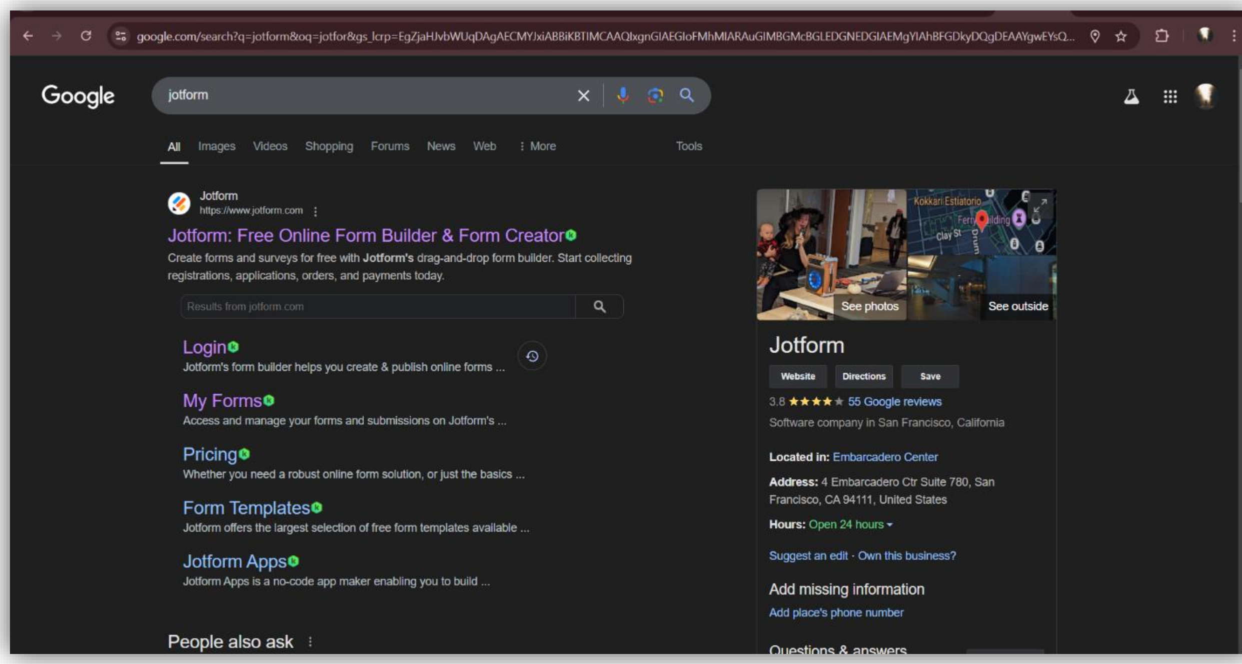
A CRM Application to Handle the Clients and their property Related Requirements

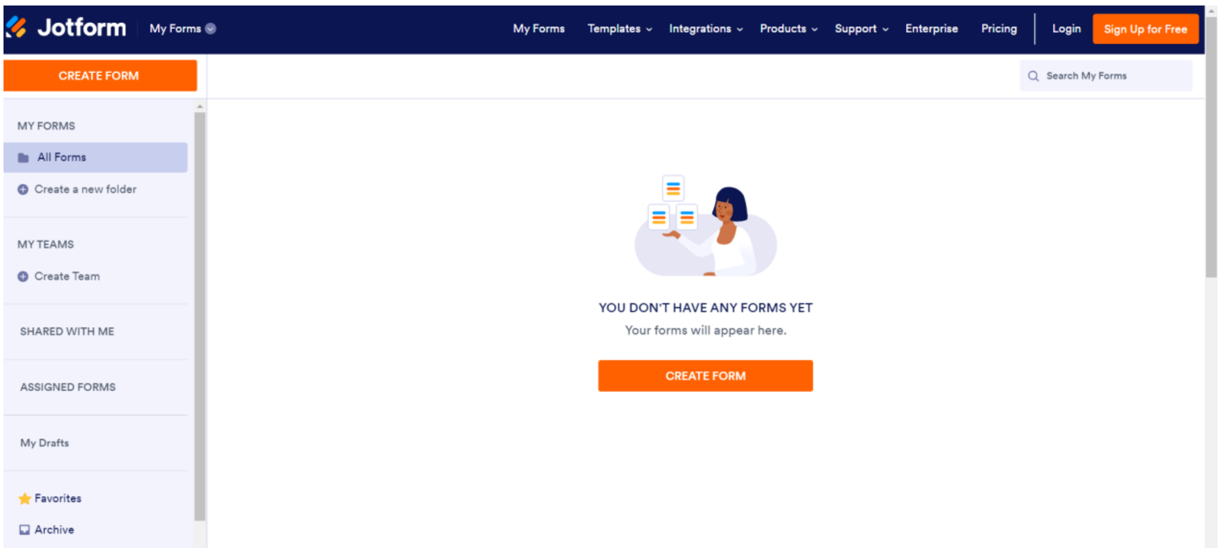
Milestone 1 :- Create a jotform and integrate it with the org to create a record of customers automatically.

USE CASE : - 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.

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



2) After login click on create form and click on start from scratch

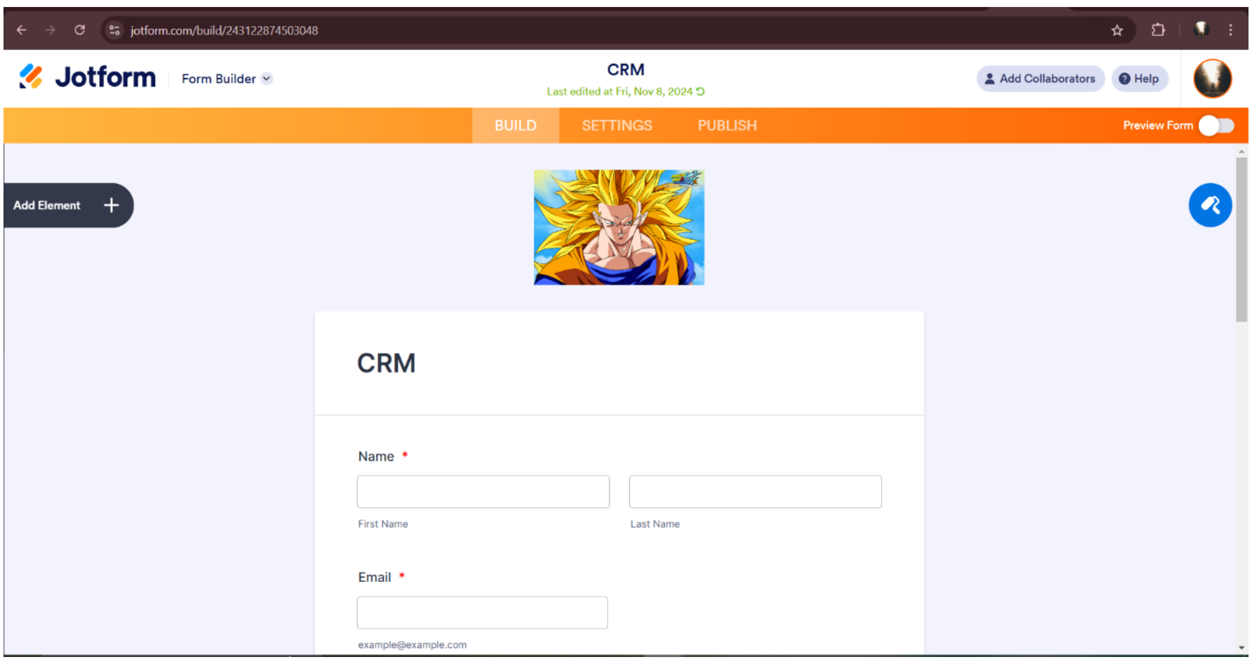


3) Now create a form to get the customer details like Name, Phone,Email, Address and type of property the customer is interested in.

4)

5) Once the form is created, publish it by clicking on publish.

https://www.jotform.com/form/240031134484041



Milestone 2 :- Create Objects from Spreadsheet.

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

- **Create Property object**

1) Follow the same from the customer object to create the Property Object
2) Property

Milestone 3 : - Integrate Jotform with Salesforce Platform

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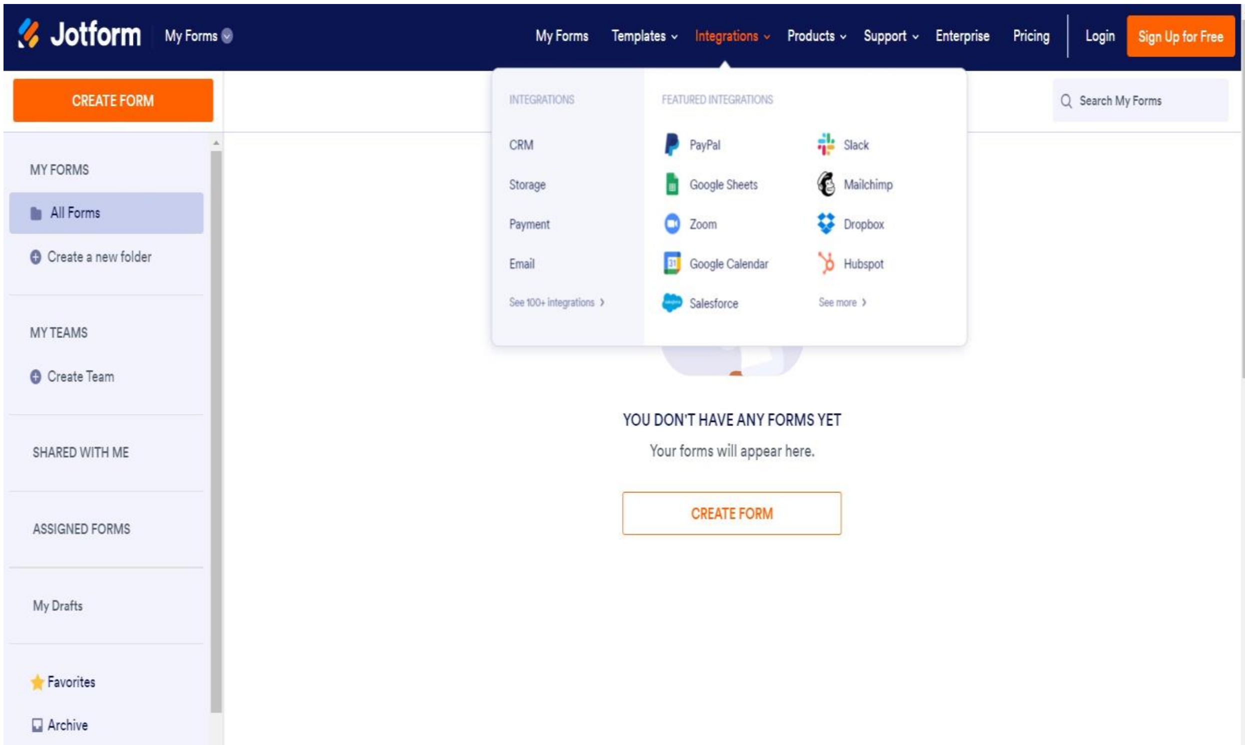
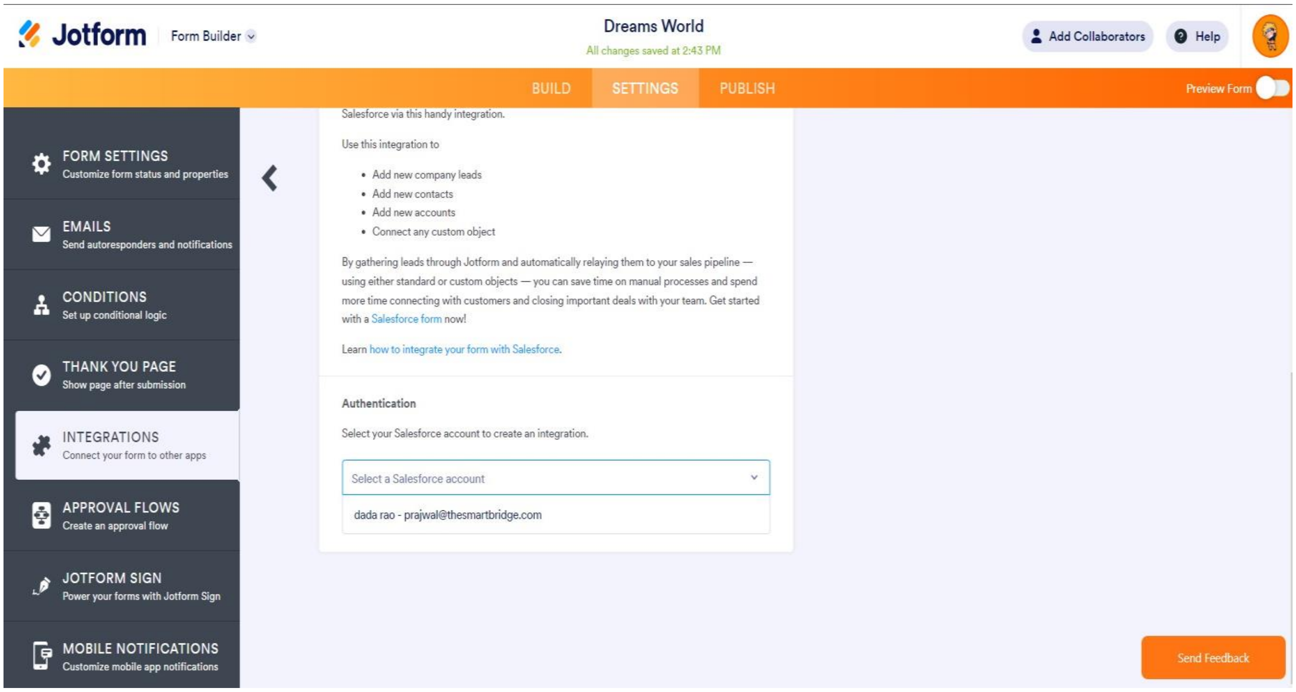
1) On the Jotform Platform, Click on Integration and choose Salesforce.

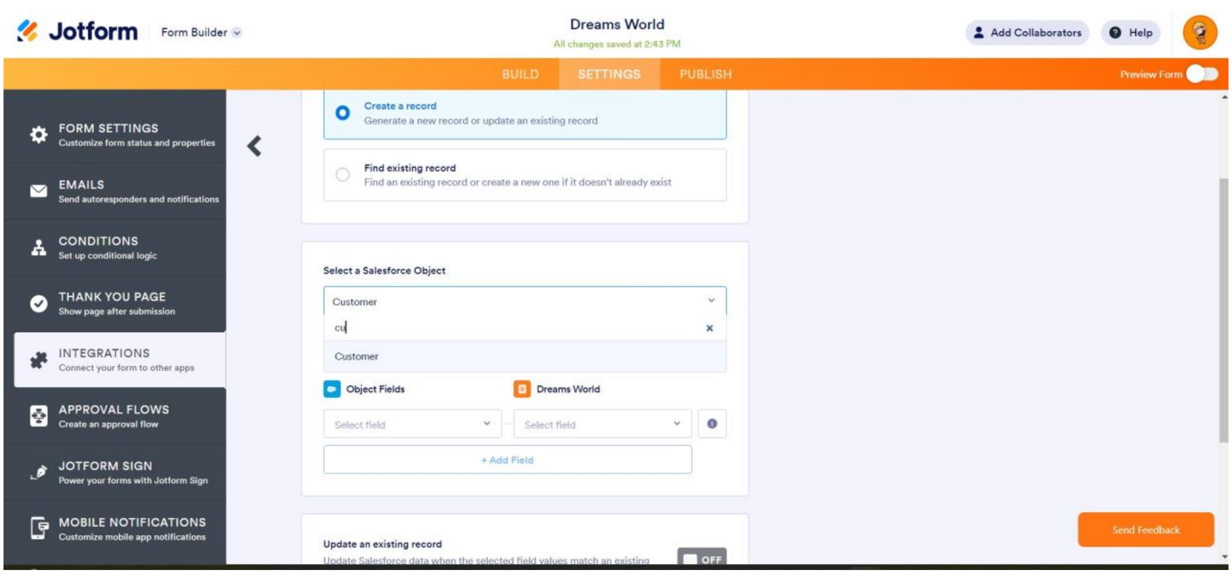


2) Click on User Integration and choose "Add to From".

3) Select the Org with which you want to Integrate your jotform with.

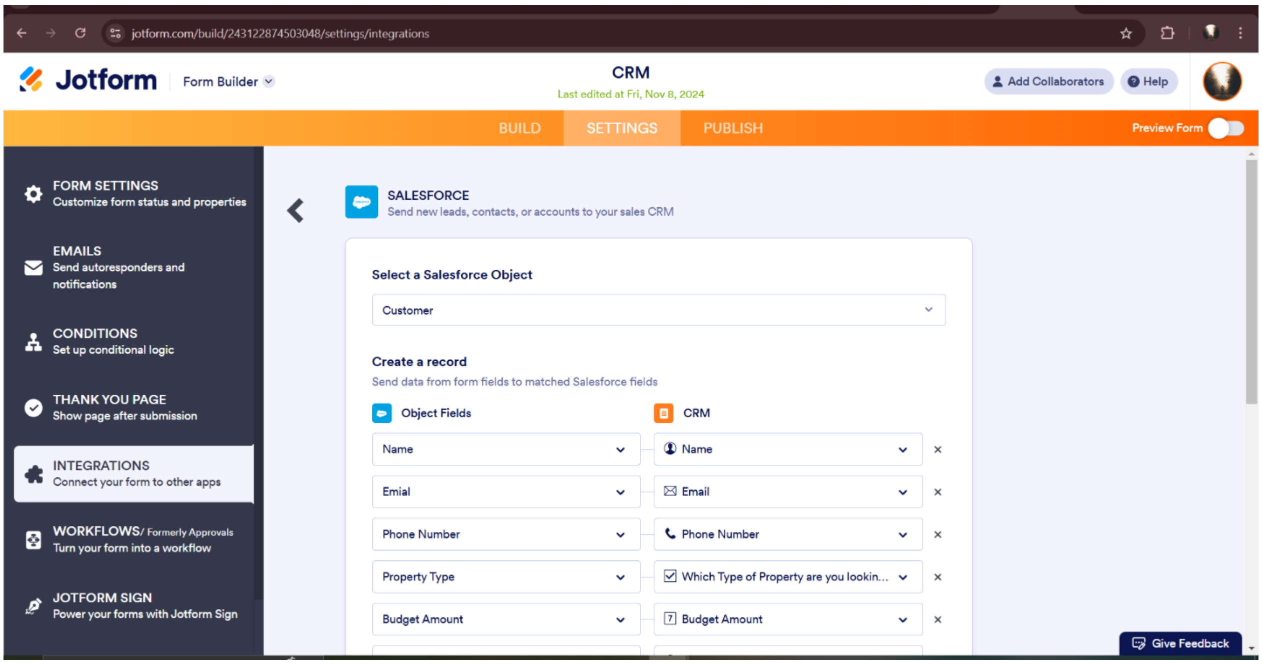


4) Select an Action - Create a record.
Select a Salesforce Object : - Customer



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”.

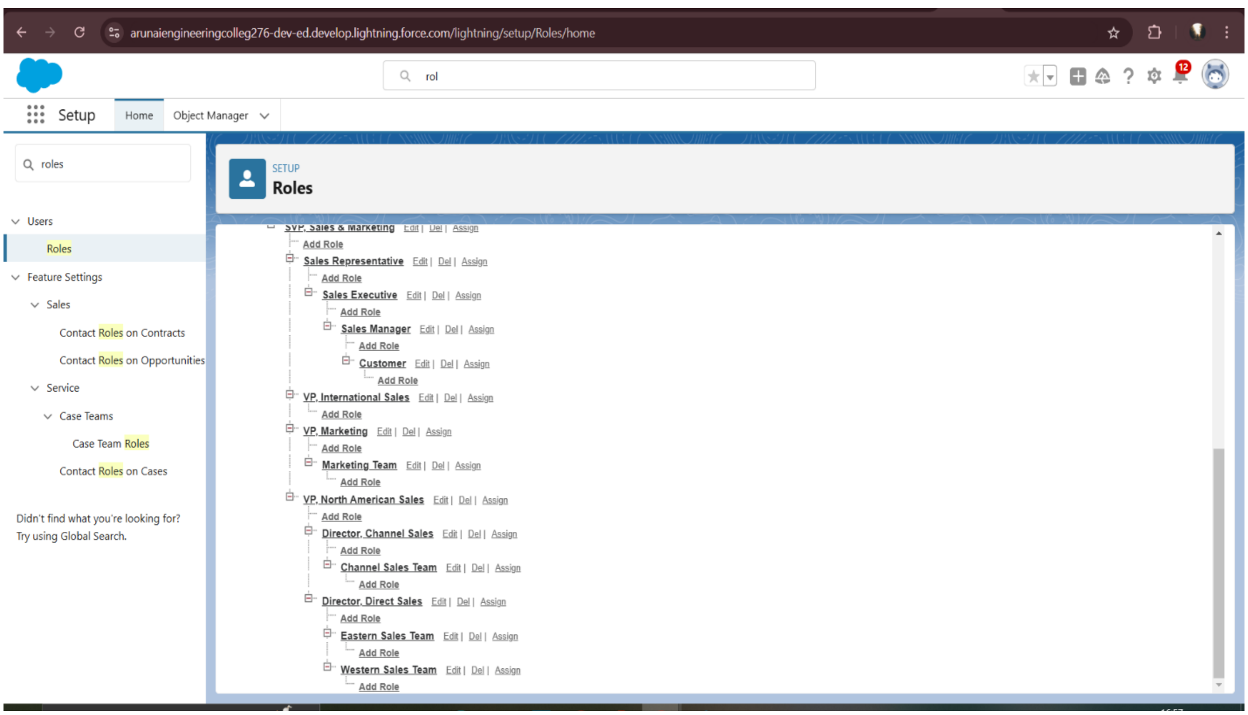


Milestone 4 : Create Roles

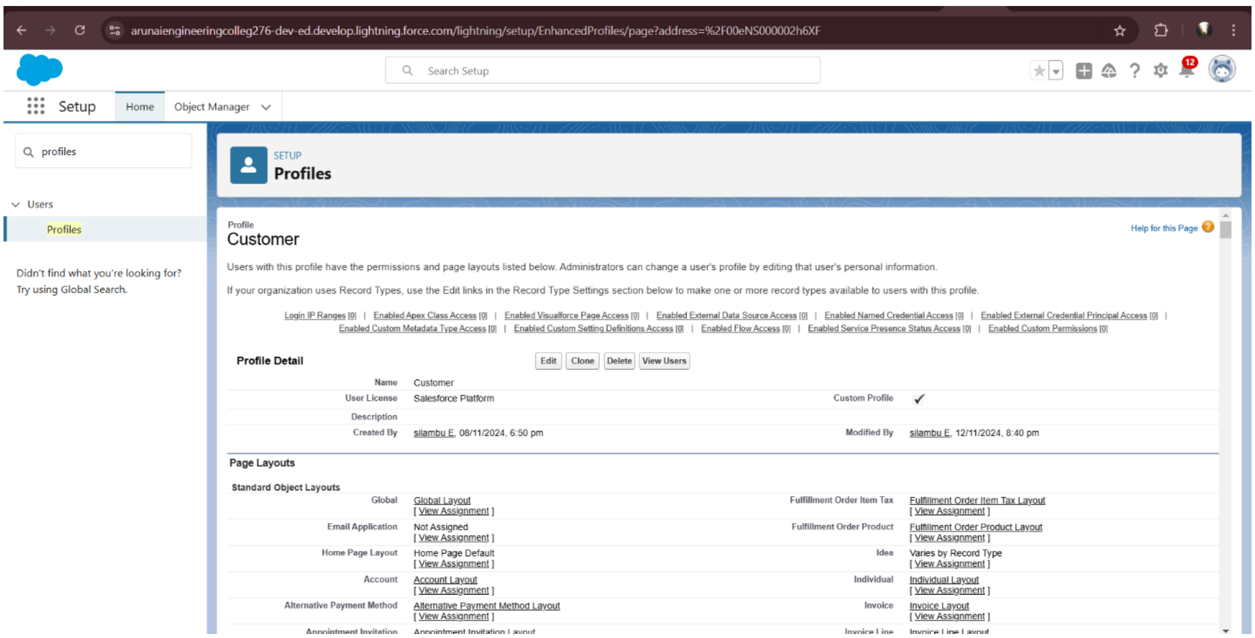
- **Sales Executive Role**

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".



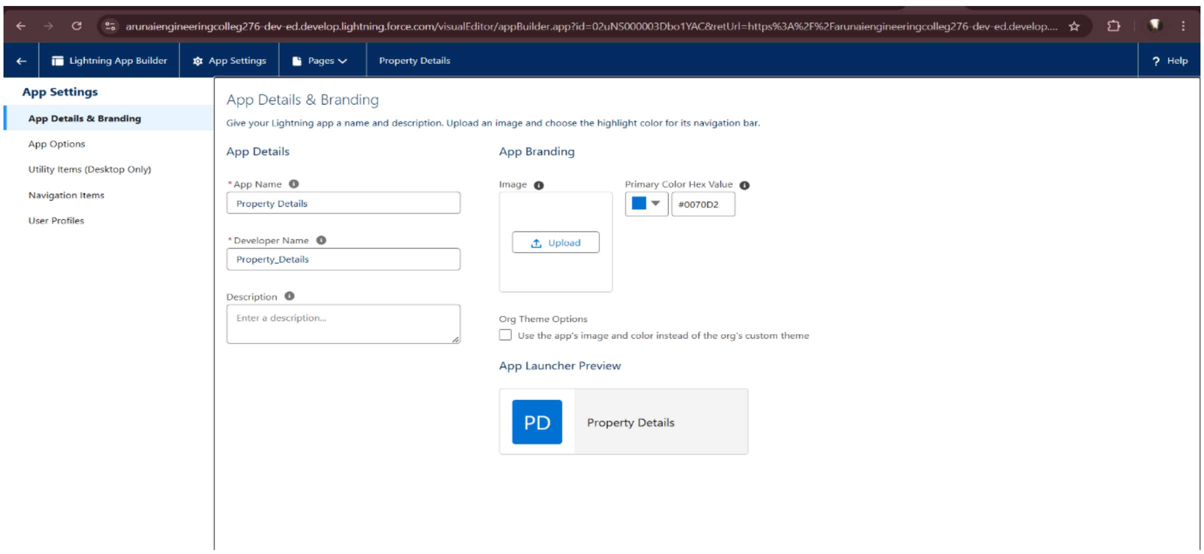
2) Label - Sales Executive
Reports to - Sales Representative



- *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.*

Milestone 5 : - Create a Property Details App

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.

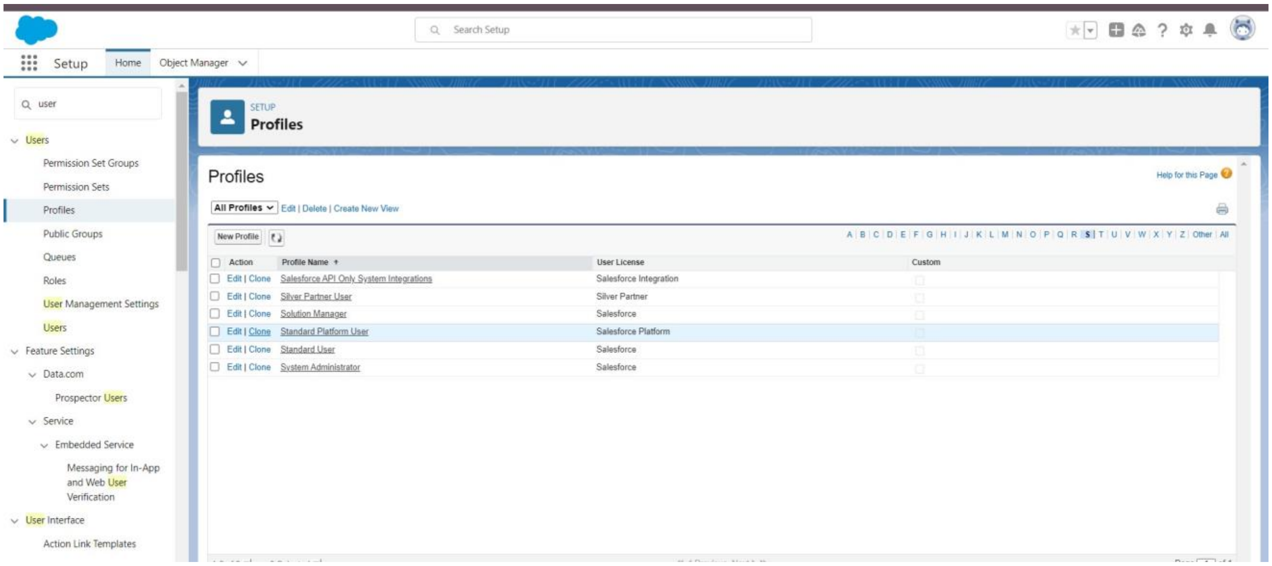


2) Click Next→ Next → Save and Add "System Admin "Profile.

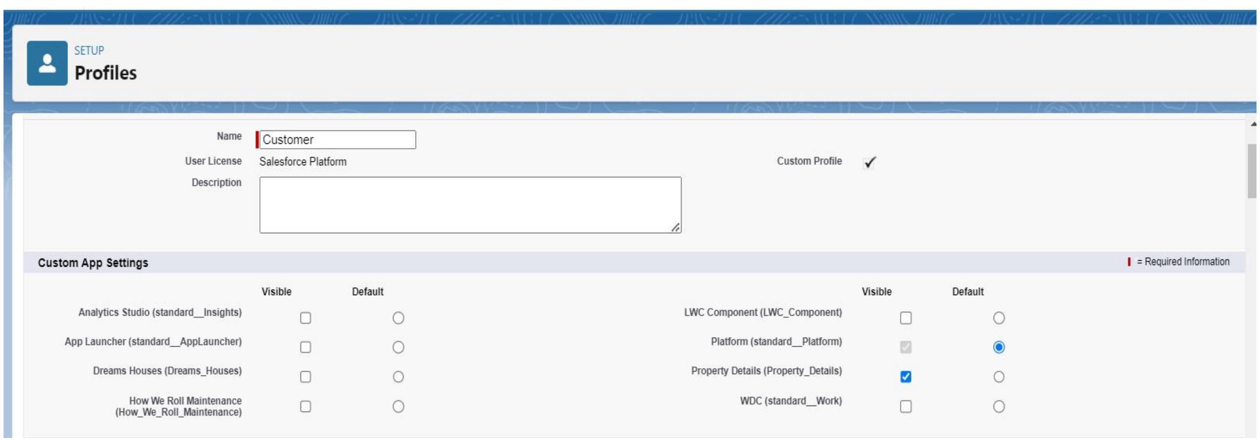
Milestone 6 : - Create Profiles

- **Customer : -**

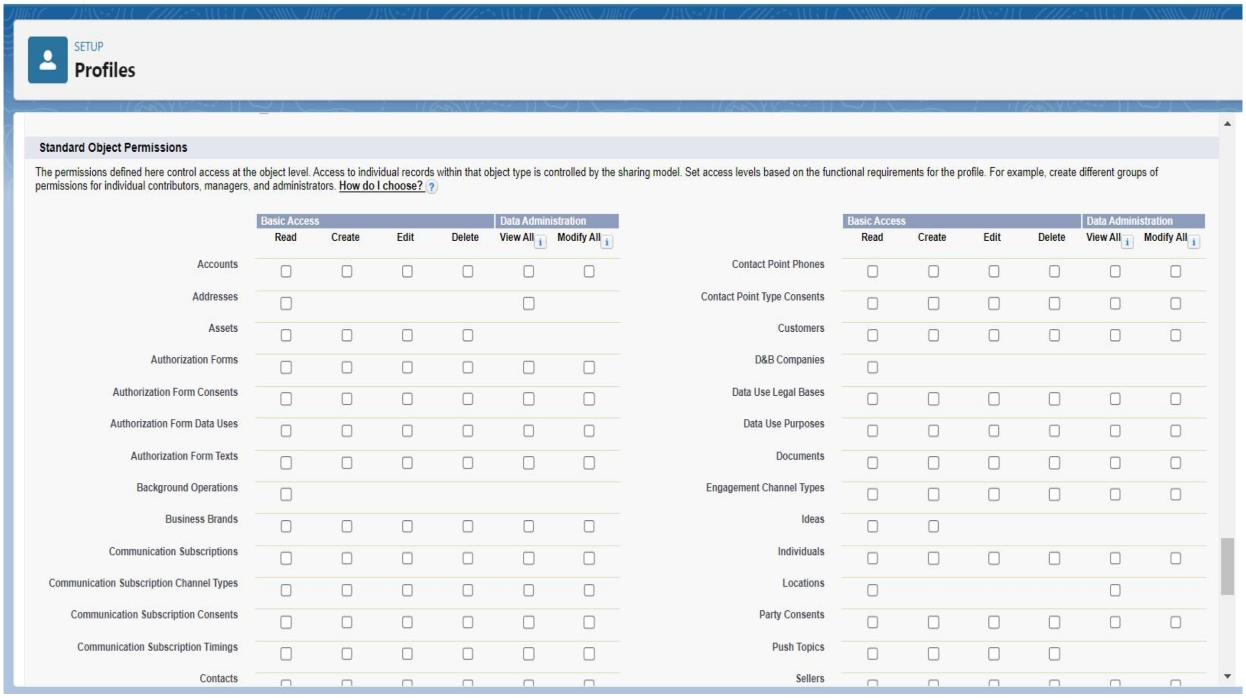
1) From Setup→ Go to Profiles and Clone Salesforce Platform User and Name it "Customer"..



2) Uncheck all the Custom Objects and Check only Property Details From Custom App Settings.



3) Also Remove all the Standard Object Permissions.

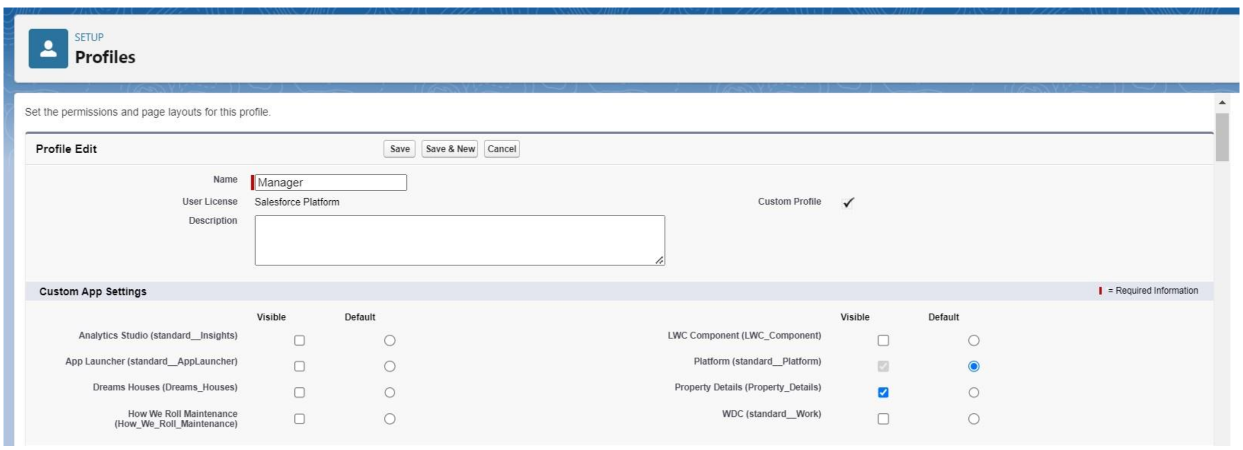


4) Uncheck all the Custom Object Permissions and check read and view all in “Property”

- **Manager : -**

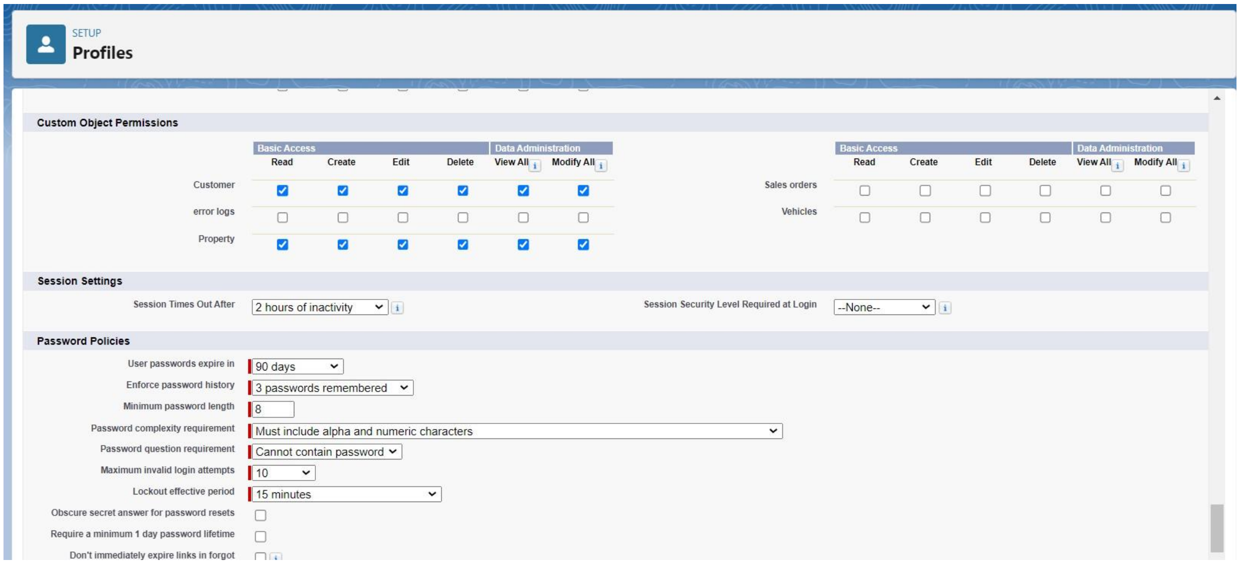
1) From Setup→ Go to Profiles and Clone Salesforce Platform User and Name it "Manager"..

2) Uncheck all the Custom Objects and Check only Property Details From Custom App Settings.



3) Also Remove all the Standard Object Permissions.

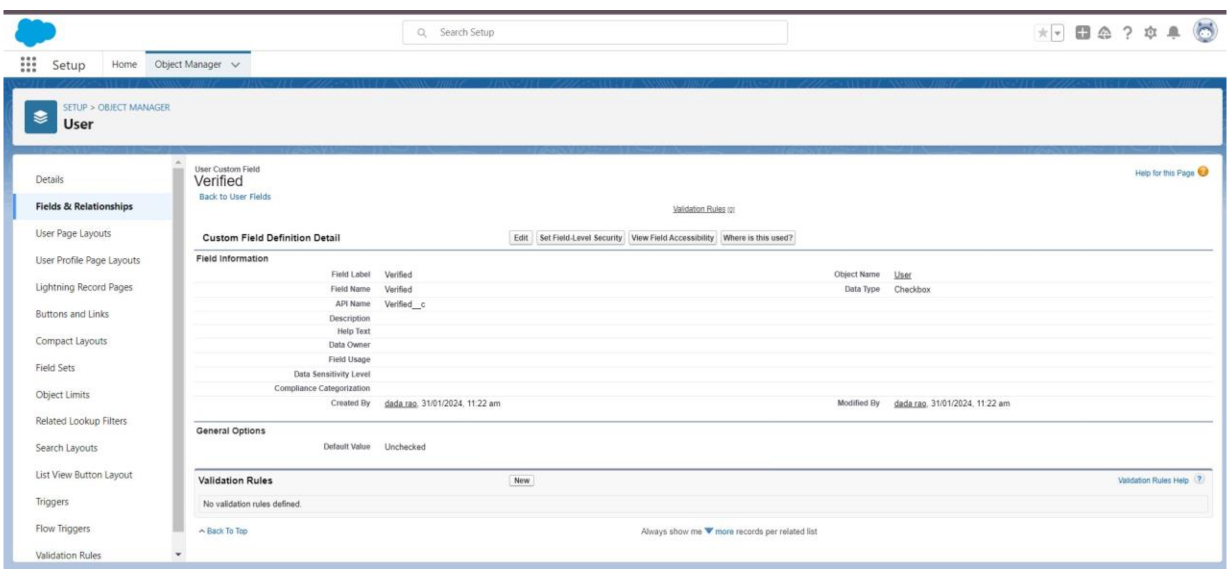
4) Uncheck all the Custom Object Permissions and check only "modify all" from "Property" and "Customer"



Milestone 7 : - Create a CheckBox field on user

1) Setup → Object Manager → Search for User → Fields and Relationships

2) Create new Field Named as “Verified” as Data type “CheckBox”



Milestone 8 : - 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) LastName - Executive
3) Role - Sales Executive
4) License - Salesforce
5) Profile - System Administrator
6) Save

User 2 : -

1) Go to Setup → Administration → 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 → Administration → 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”

7) Save

User 4 : -

1) Go to Setup → Administration → Users → New User

2) LastName - Customer2

3) Role - Customer

4) License - Salesforce Platform

5) Profile - Customer

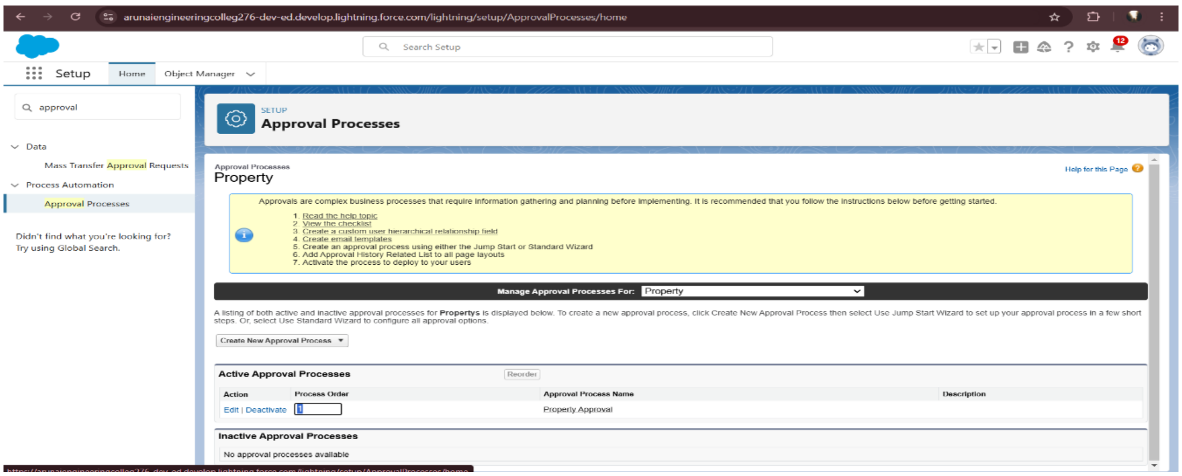
6) Make Sure the verified check box is “checked”

7) Save

Milestone 9 :- Create an Approval Process for Property Object

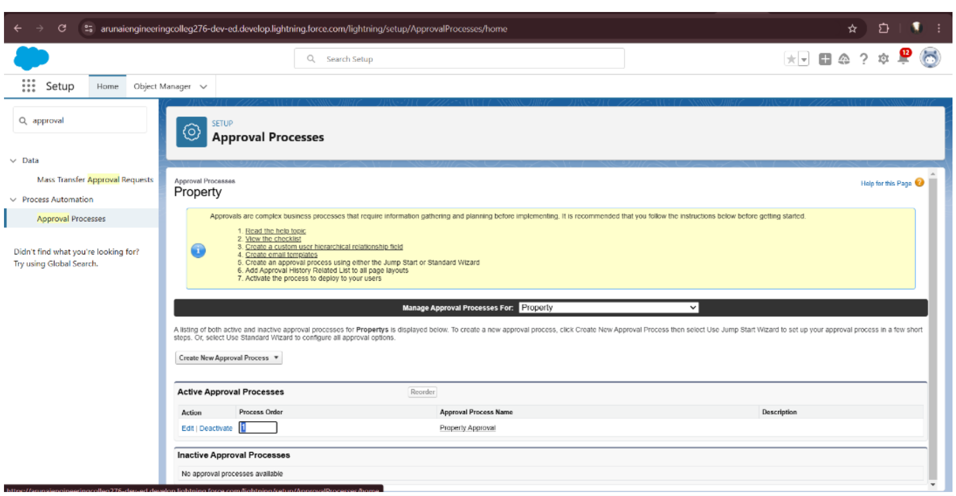
1) From Setup → Process Automation → Approval Process

2) Process Name - Property Approval



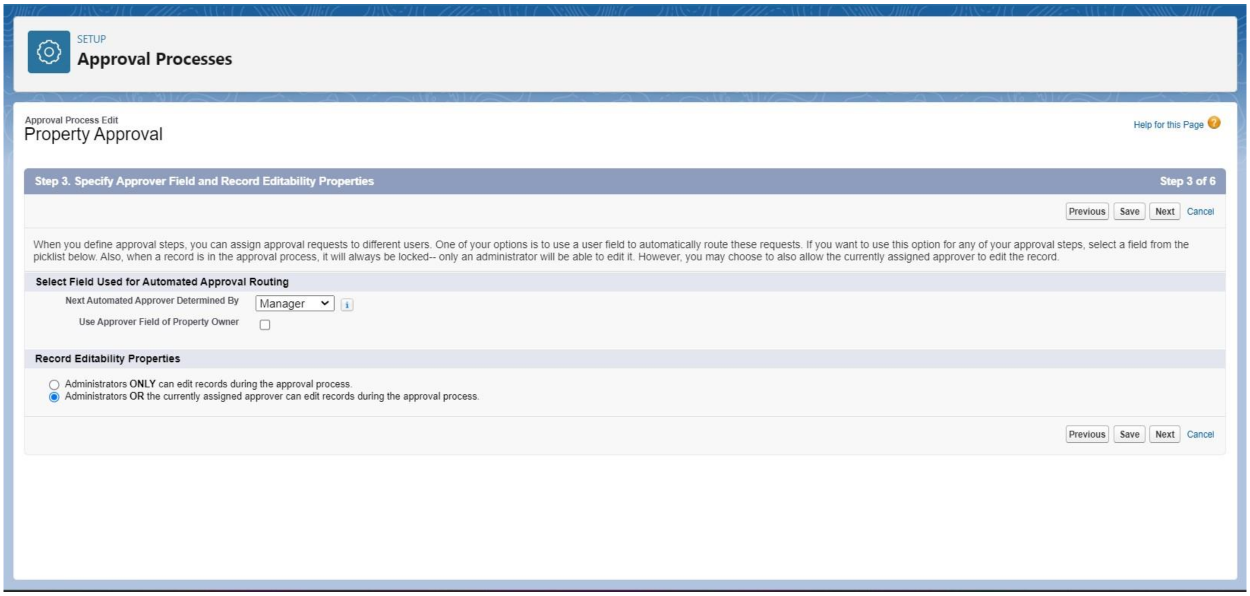
3) Give 2 criteria →

a) Location is not equal to blank,
b) Verified Equals false.

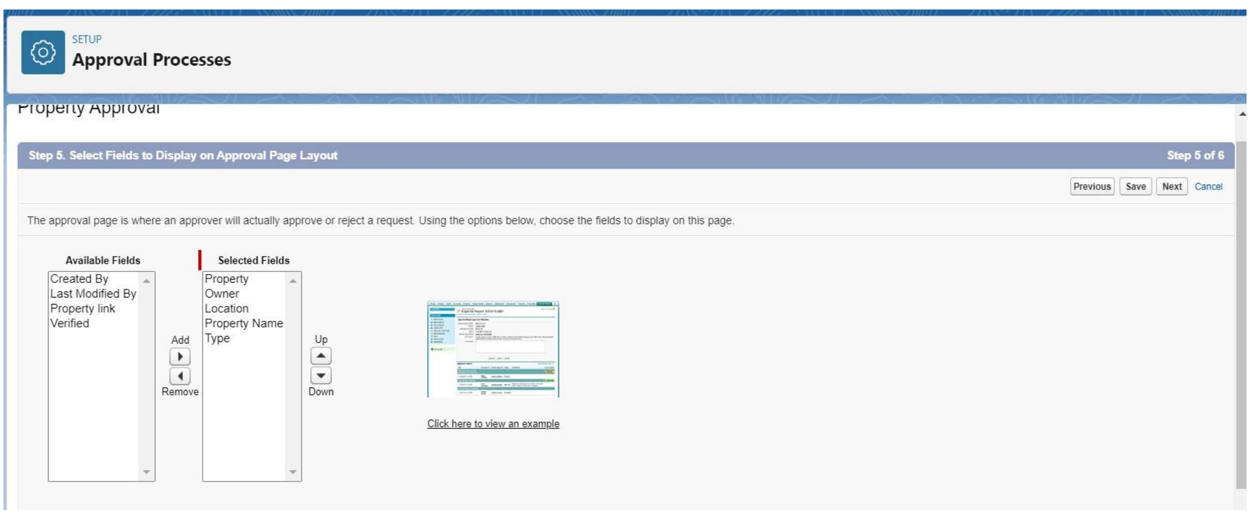


4) Click next and "**Next Automated Approver Determined By" → Select Manager**

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 Layout select Property, Owner, Location, Type.

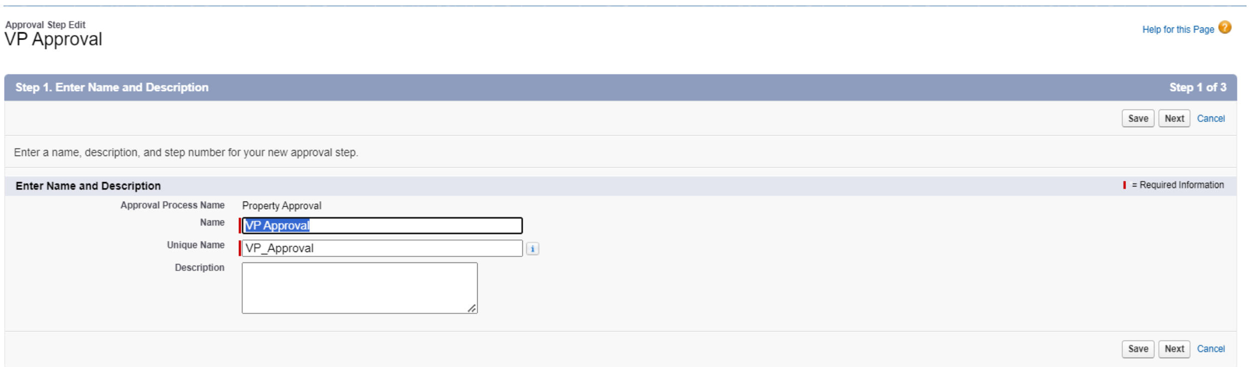


7) Click Next and Select the initial Submiters →

a) Owner → Property Owner
b) Roles → Sales Manager

8) Save.

9) Add an approval step name "Executive Approval "

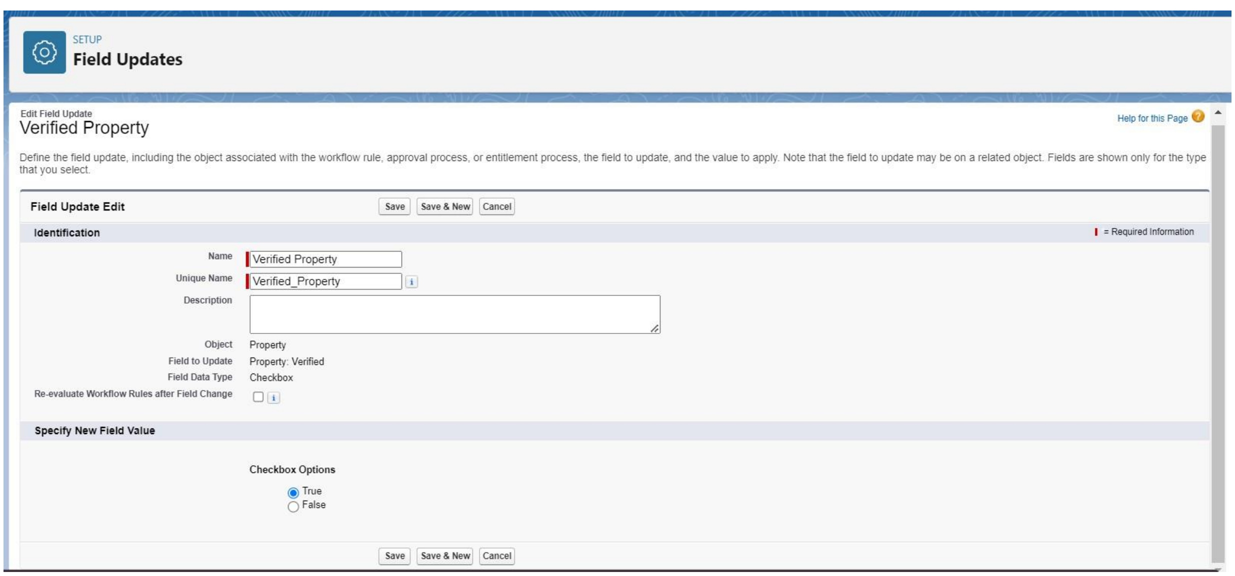


10) specify the Criteria → All record should enter

11) click next and select the Approver as " Sales Executive " and "Save"

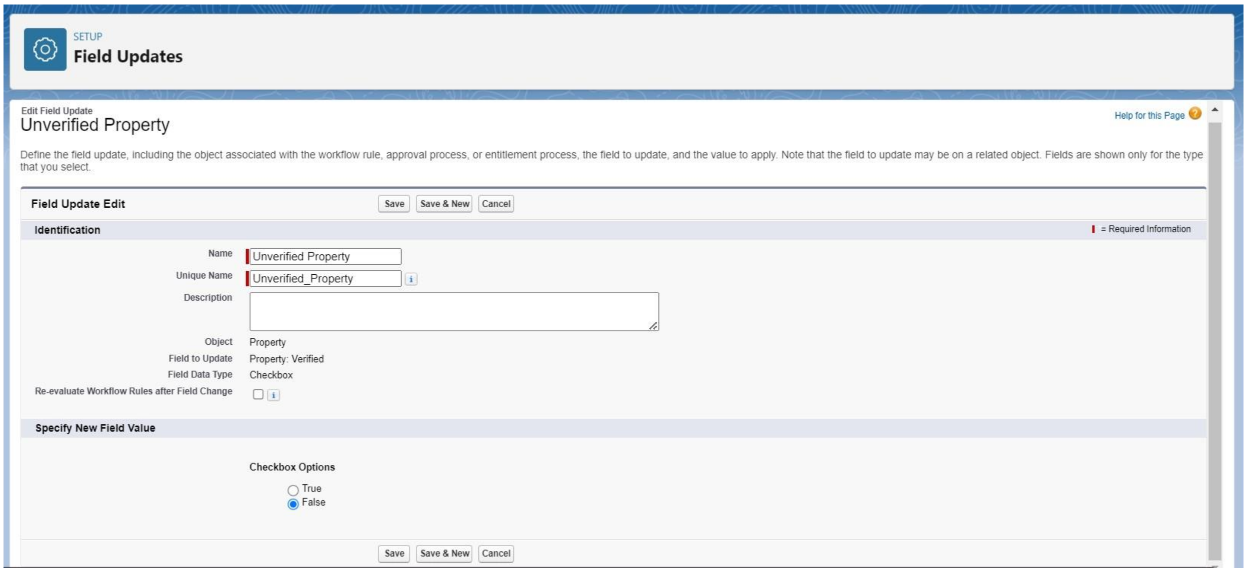
12) Add One field Update as “Verified Property”

a) Select Object → Property
b) Field to Update → Verified
c) Field Data Type → CheckBox
d) Select CheckBox Option as “True”
e) Save.



13) Add One field Update as “UnVerified Property”

a) Select Object → Property
b) Field to Update → Verified
c) Field Data Type → CheckBox
d) Select CheckBox Option as “False”
e) Save.



14) Activate the Approval Process.

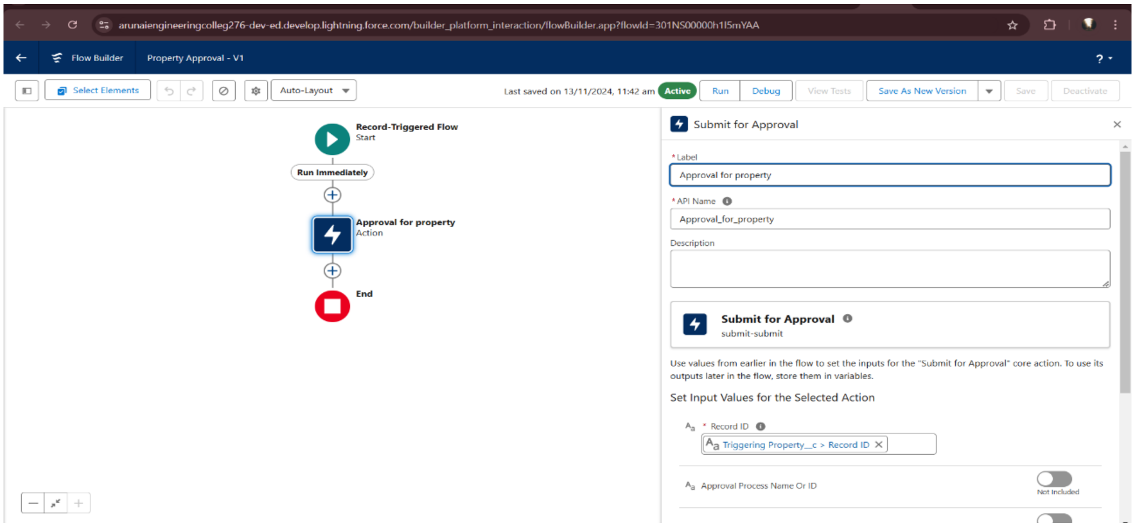
Milestone 10 : - Create a Record trigger flow to submit the Approval Process Automatically.

1) From Setup → Search for Flows → Click On New and Select “Record Trigger Flow”.

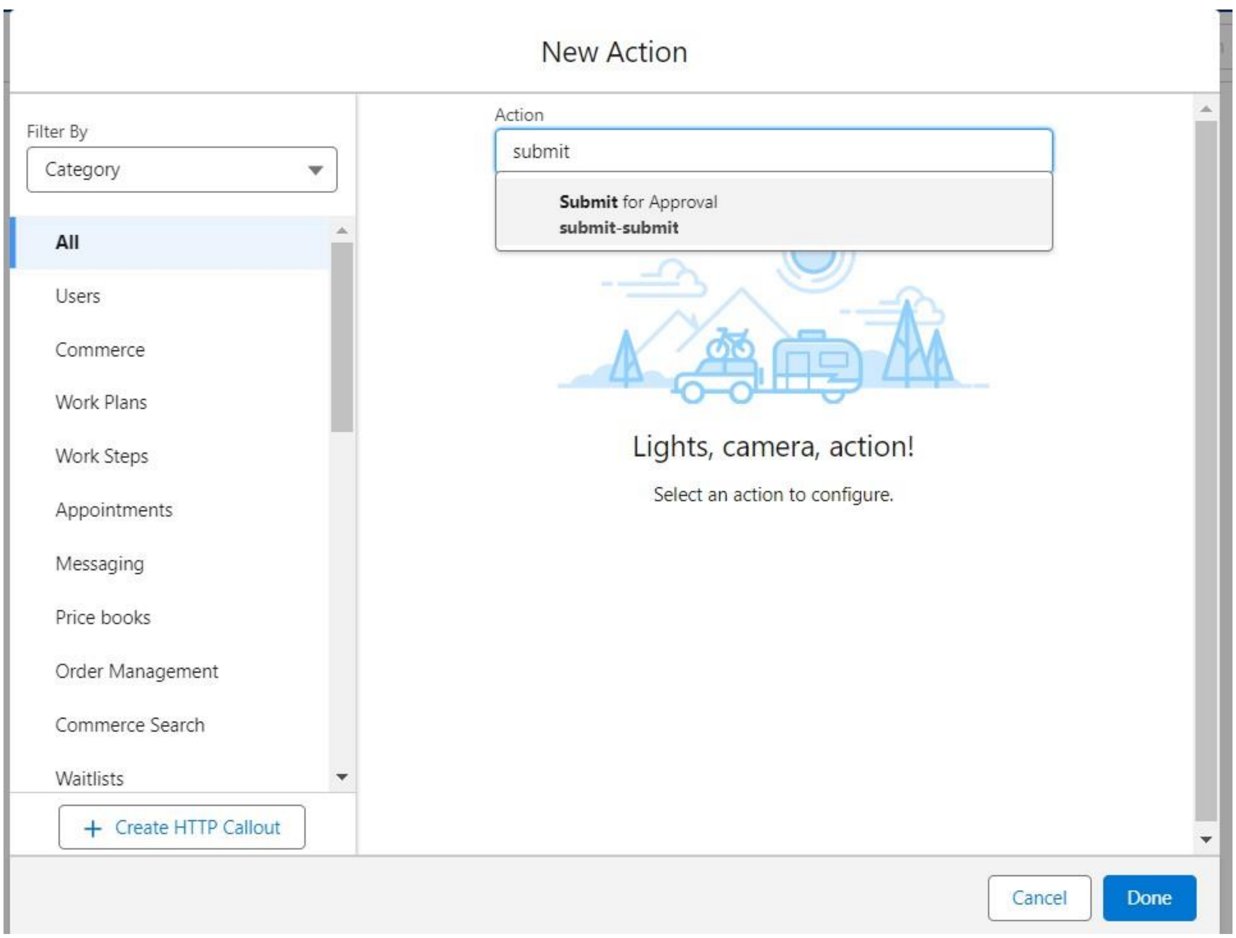
2) Select Object → Property

3) Select “Trigger the flow when” → “A record is created”

4) Set Entry Conditions → “None”



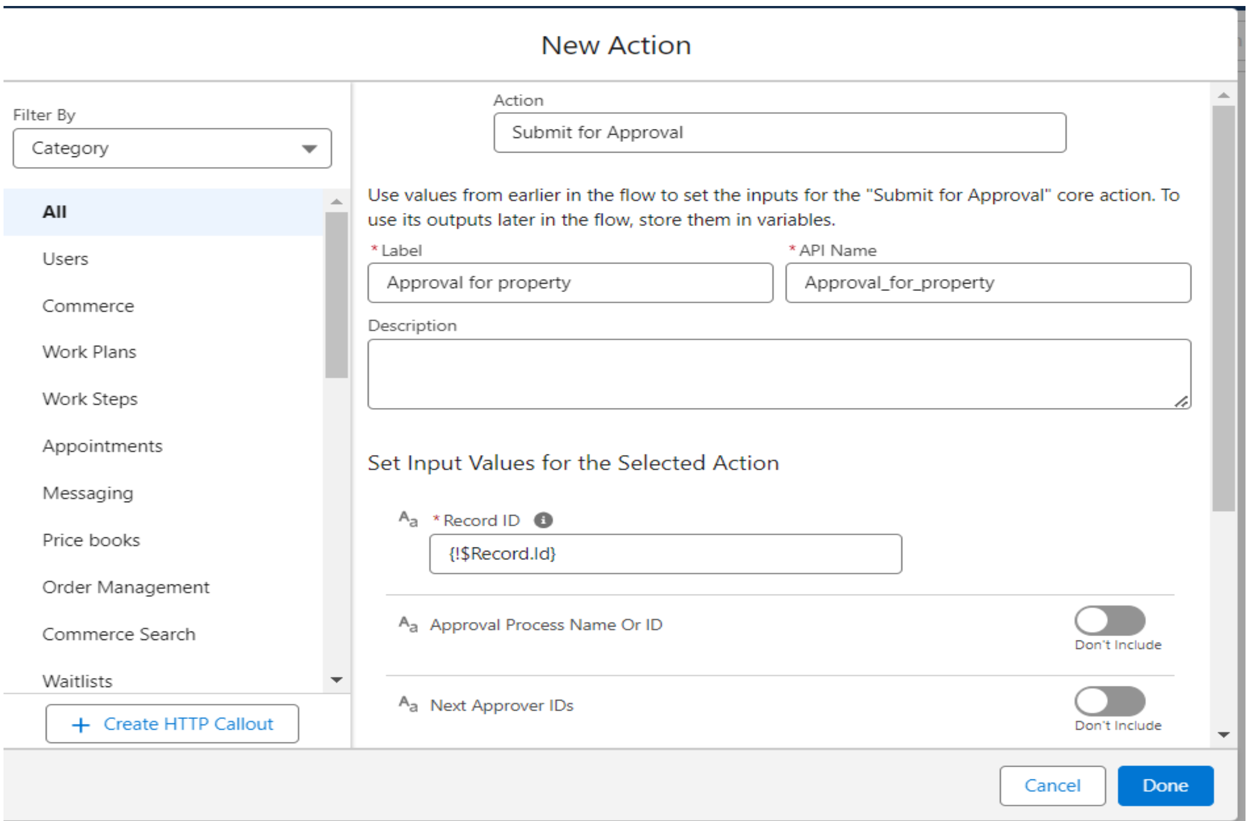
5) Add a “Action” → “Submit for Approval”



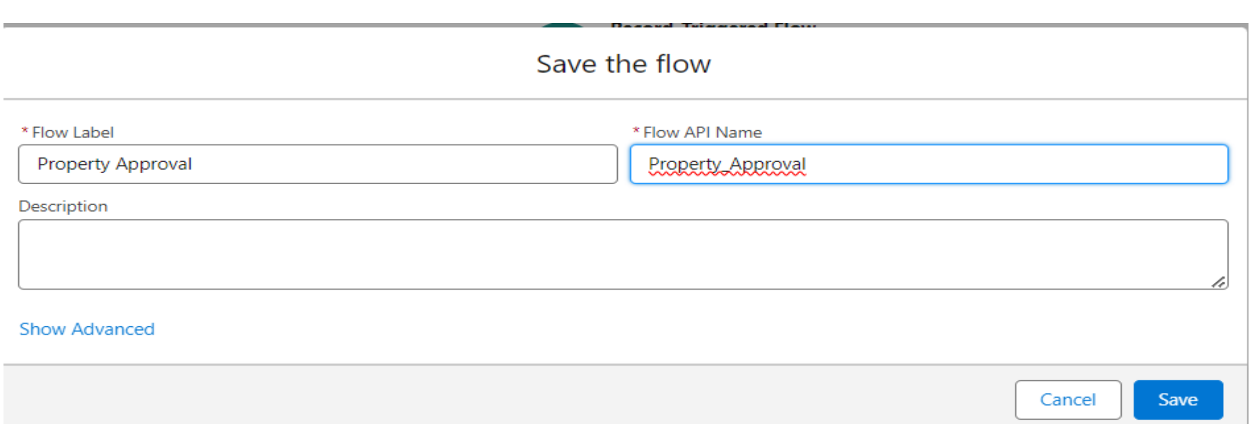
6) Give Label → Approval for property

7) Record Id → {!$Record.Id}

8) Done



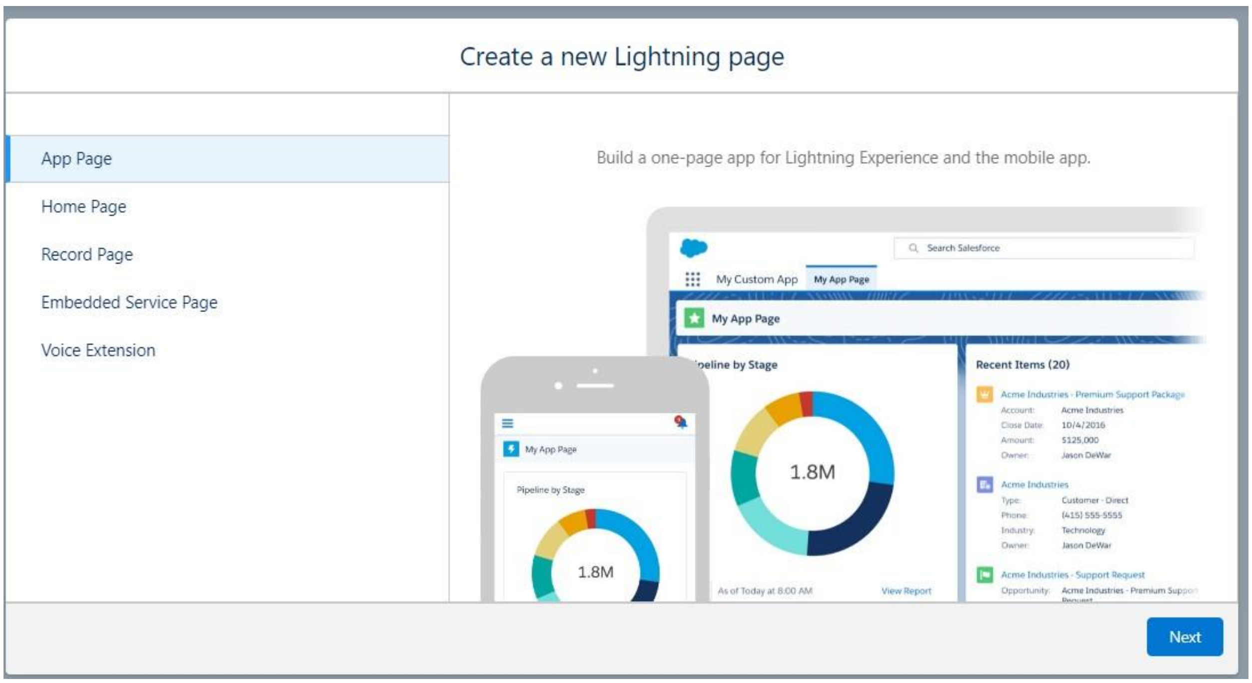
9) Save the Flow and Give label as → "Property Approval" and "Activate"



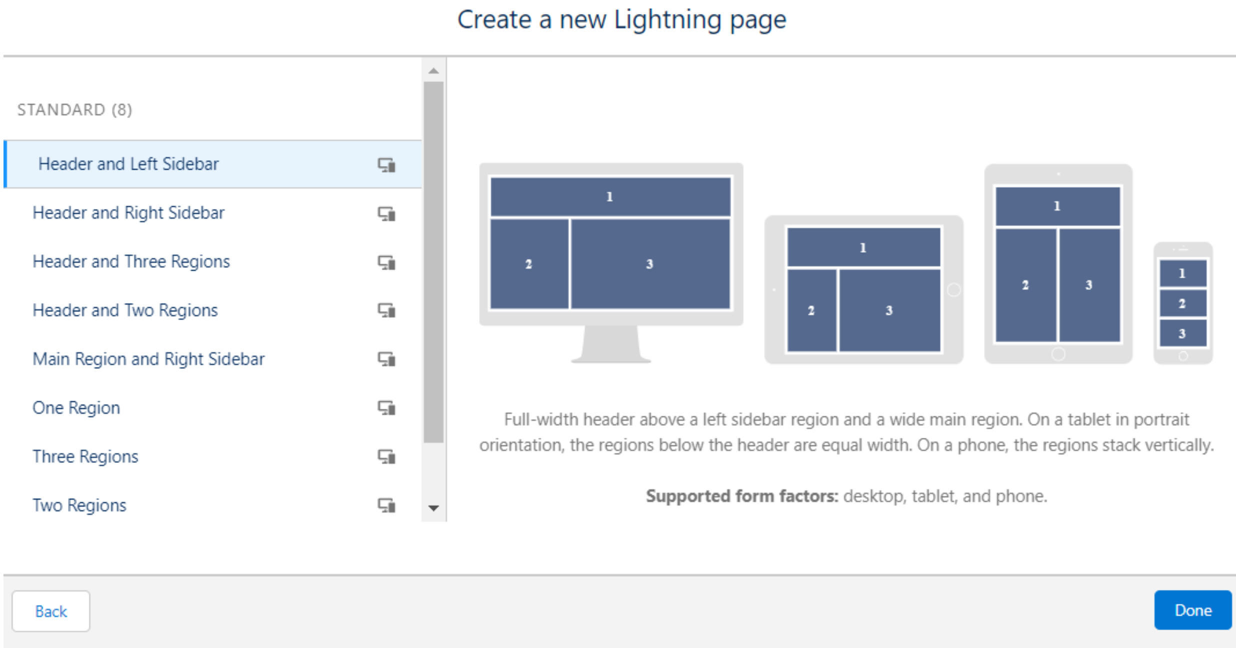
Milestone 11 :- Create an App Page

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

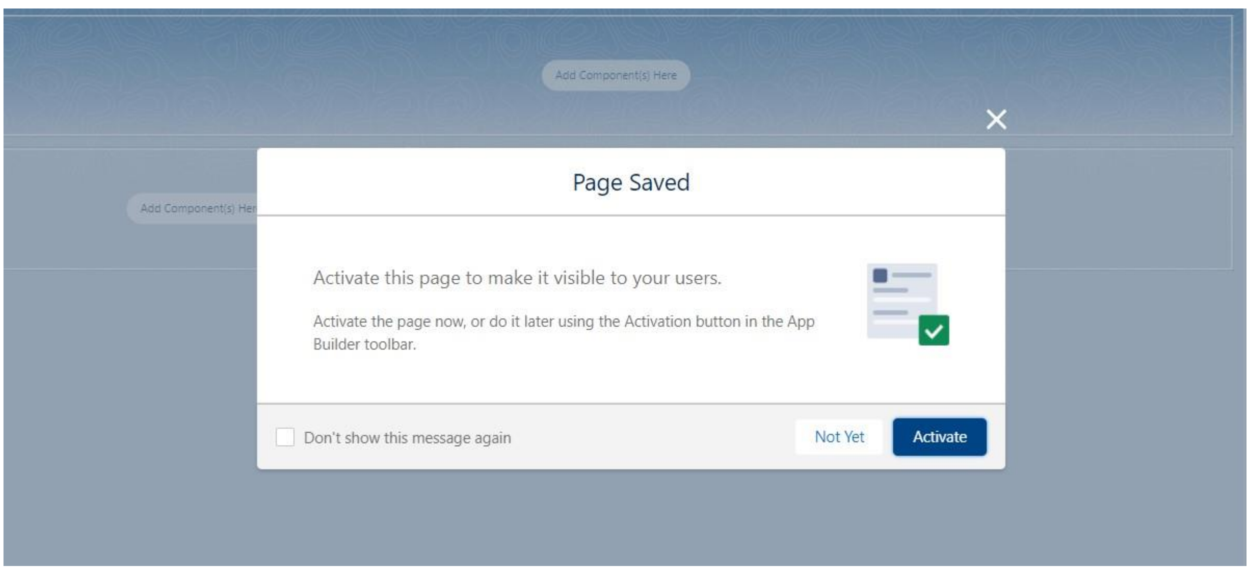
1) From Setup → Go to Lightning App Builder → Click on New → Select App Page andClick on Next.



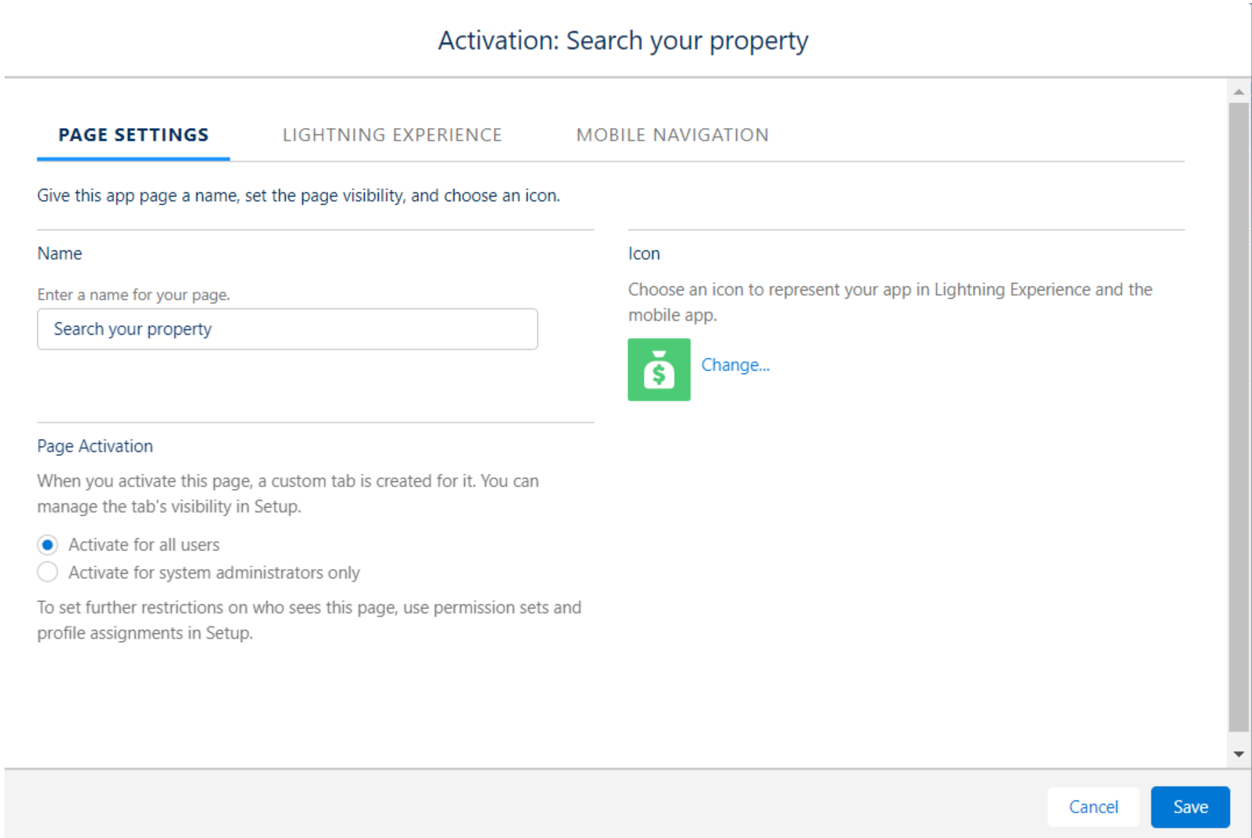
2) Give Label as “Search your Property” click “Next”.
3) Click “header and Left Sidebar” and Click on “Done”



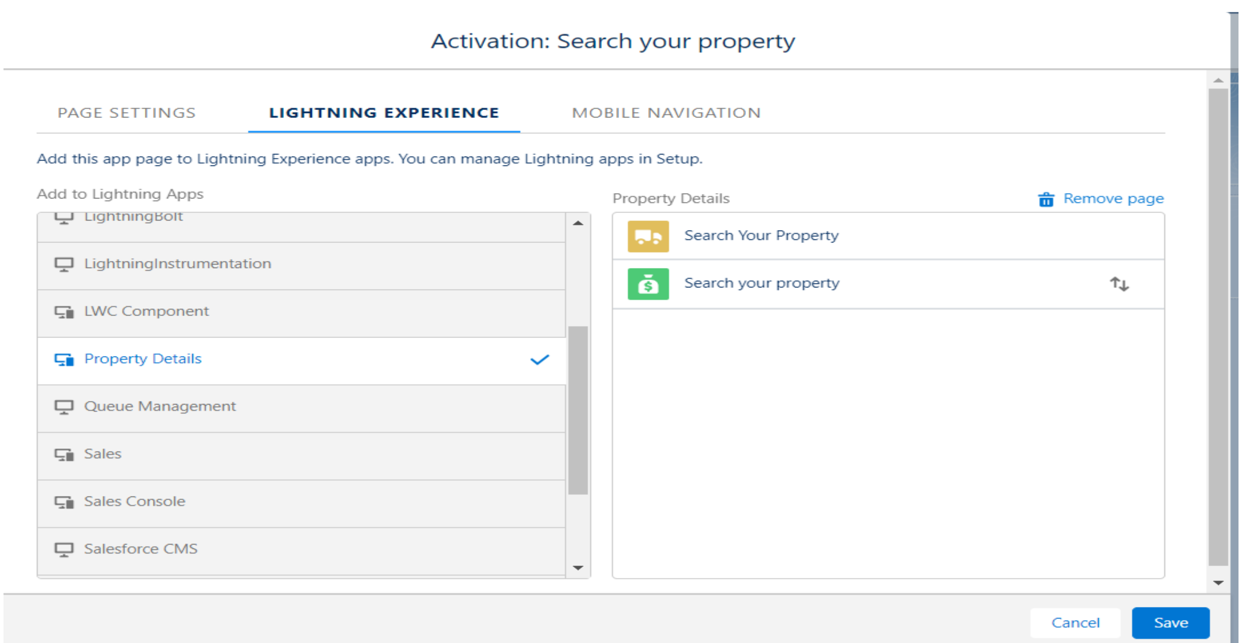
4) Click on “Save ” and then click on “Activate”.



5) From Page Setting select page activation as “Activate for all Users”.



6) From Lightning Experience Click on “Property Details” and click on Add Page“.



7) Then Click on “Save”

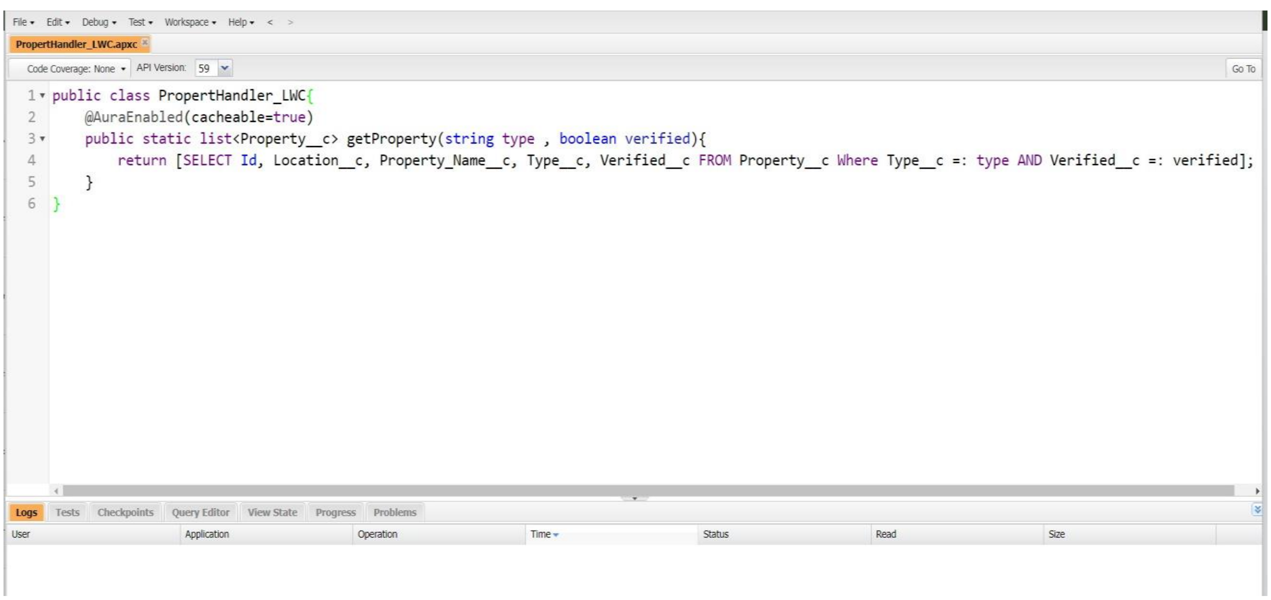
Milestone 12 :- Create a LWC Component

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

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

<u>Code: -</u>

```
public class PropertHandler_LWC{
   @AuraEnabled(cacheable=true)
   public static list<Property__c> getProperty(string type , boolean verified){
      return [SELECT Id, Location_c, Property_Name_c, Type_c, Verified_c FROM
Property_c Where Type_c =: type AND Verified_c =: verified];

   }
}
```



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.

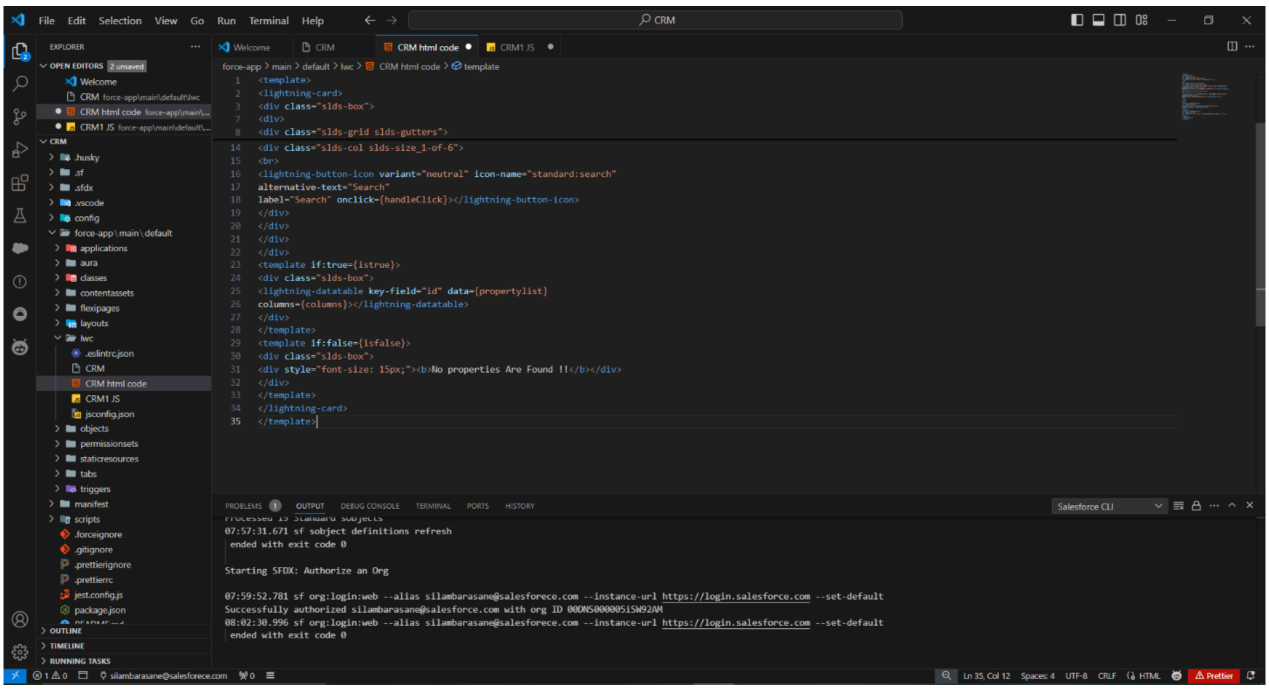
4) Now (ctrl+shift +P) → Create a lightning Web Component and Name it Anything you want to. (Example -)

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={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>
```



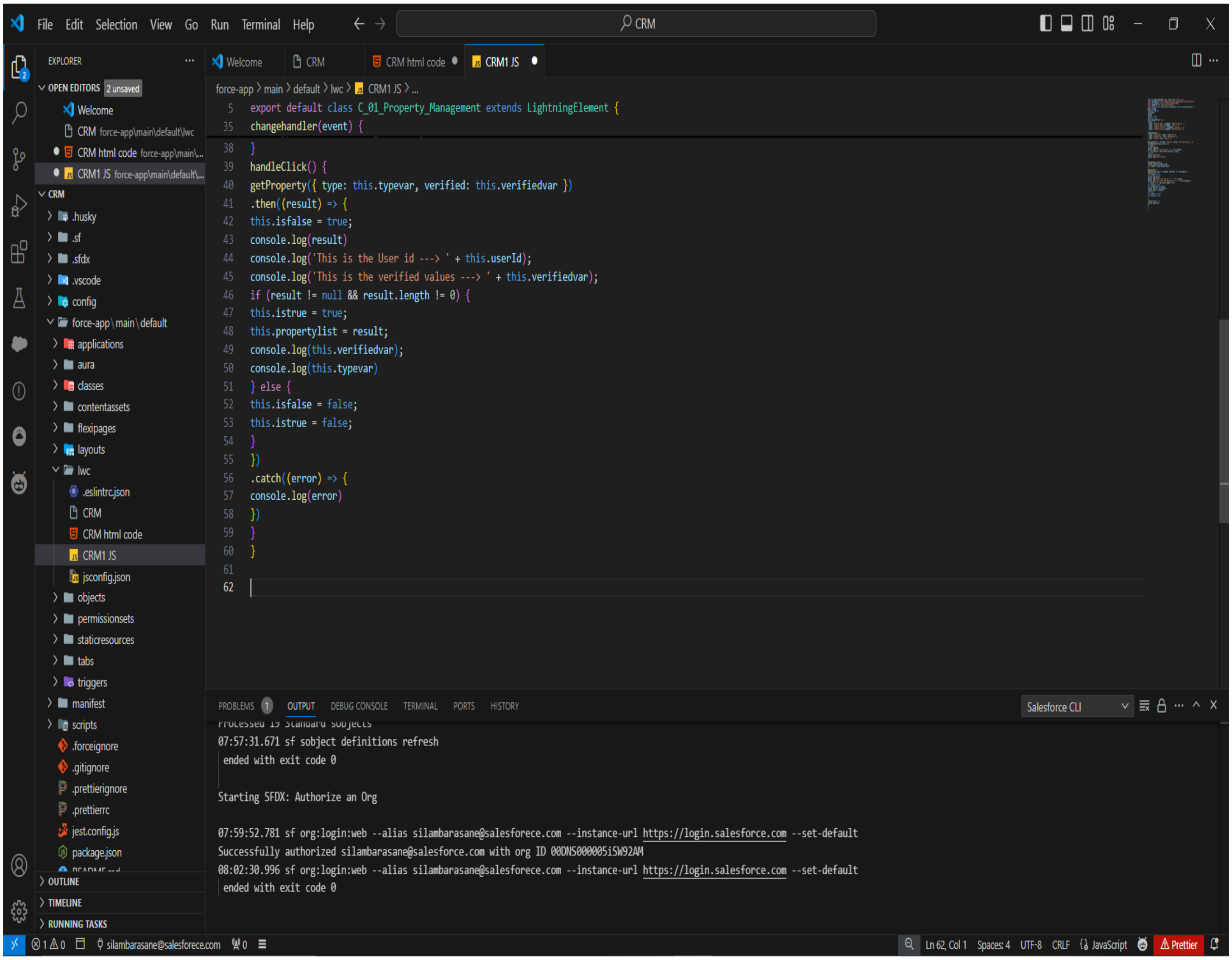
6) In Your Js File Write this code : -

Code :-

```
import { LightningElement, api, track, wire } from 'lwc';
import getProperty from "@salesforce/apex/PropertHandler_LWC.getProperty"
import { getRecord } from 'lightning/uiRecordApi';
import USER_ID from '@salesforce/user/Id';
export default class C_01_Property_Management extends LightningElement {
   @api recordId
   userId = USER_ID;
```

```
verifiedvar
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" }
]
propetyoptions = [
   { 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);
```

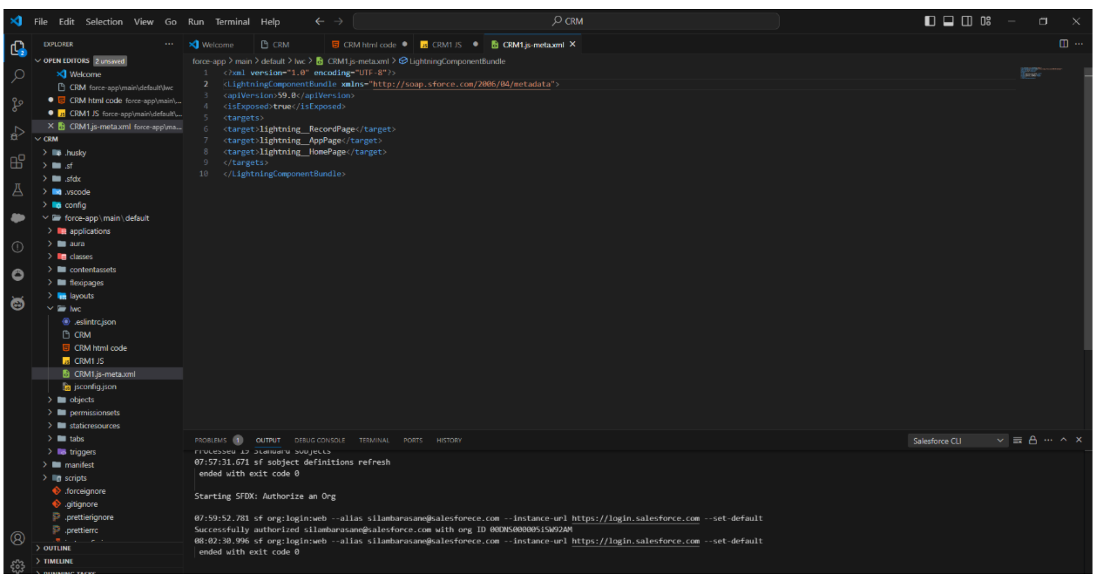
```
            console.log('This is the verified values ---> ' + this.verifiedvar);
            if (result != null && result.length != 0) {
                this.istrue = true;
                this.propertylist = result;
                console.log(this.verifiedvar);
                console.log(this.typevar)
            } else {
                this.isfalse = false;
                this.istrue = false;
            }

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


}
```


File Edit Selection View Go Run Terminal Help
CRM
EXPLORER
OPEN EDITORS 2 unsaved
Welcome
CRM force-app\main\default\lwc
CRM html code force-app\main\...
CRM1 JS force-app\main\default\...
CRM
.husky
.sf
.sfdx
.vscode
config
force-app\main\default
applications
aura
classes
contentassets
flexipages
layouts
lwc
.eslintrc.json
CRM
CRM html code
CRM1 JS
jsconfig.json
objects
permissionsets
staticresources
tabs
triggers
manifest
scripts
.forceignore
.gitignore
.prettierignore
.prettierrc
jest.config.js
package.json
OUTLINE
TIMELINE
RUNNING TASKS
Welcome
CRM
CRM html code
CRM1 JS
force-app > main > default > lwc > CRM1 JS > ...
export default class C_01_Property_Management extends LightningElement {
changehandler(event) {
}
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)
})
}
}
PROBLEMS 1
OUTPUT
DEBUG CONSOLE
TERMINAL
PORTS
HISTORY
Salesforce CLI
07:57:31.671 sf sobject definitions refresh
ended with exit code 0
Starting SFDX: Authorize an Org
07:59:52.781 sf org:login:web --alias silambarasane@salesforece.com --instance-url https://login.salesforce.com --set-default
Successfully authorized silambarasane@salesforece.com with org ID 00DNS000005iSW92AM
08:02:30.996 sf org:login:web --alias silambarasane@salesforece.com --instance-url https://login.salesforce.com --set-default
ended with exit code 0
silambarasane@salesforece.com
Ln 62, Col 1 Spaces: 4 UTF-8 CRLF JavaScript Prettier

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>
```

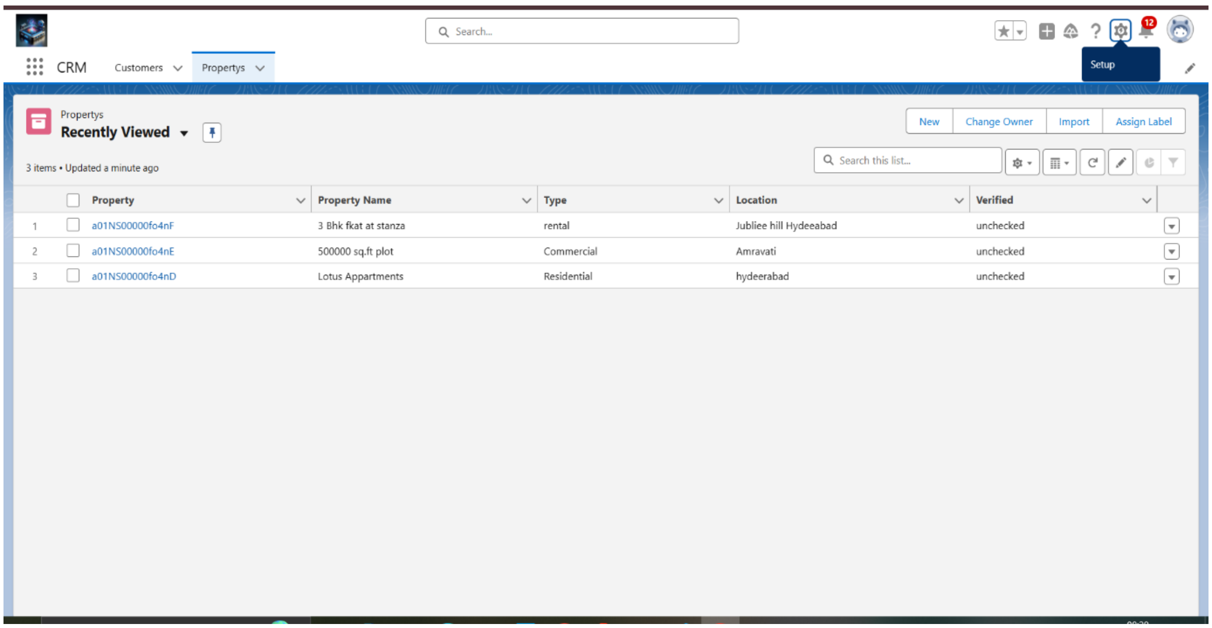


8) After Saving all the three Codes , Right Click and deploy this component to the org.

Milestone 13 : - Drag this Component to your App Page

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 theComponent to your App Page and Save the Page.

Milestone 14 : - Give Access of Apex Classes to Profiles

1) From Setup → Search For Apex Classes → Click on “Security” behind “PropertyHandler_LWC”.

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

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