

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

Project Overview

The CRM solution for Dreams World Properties utilizes Salesforce to enhance client management and refine property recommendations. By linking Salesforce with the website, client interactions and preferences are automatically recorded, enabling smooth data integration into the CRM. This setup segments clients into approved and non-approved categories, allowing Dreams World Properties to provide customized property listings and tailored recommendations for each group. The streamlined system improves user experience and boosts operational efficiency, making it easier for the team to engage clients effectively and expand their real estate offerings as the business grows.

Definitions

Customer Relationship Management (CRM)

CRM refers to the strategy, technology, and processes that businesses use to manage and analyze customer interactions and data throughout the customer lifecycle. Its main goals are to strengthen customer relationships, improve retention, and drive sales growth.

Salesforce

Salesforce is a leading CRM platform, offering comprehensive tools for sales, service, marketing, and analytics.

Objective of the CRM Application

The primary goal of the CRM Application is to create a centralized platform for efficient client relationship and property management. Designed for real estate businesses, it aims to elevate customer service, communication, and operational efficiency. Key objectives include:

1. **Client Management:** Establish a detailed database to store client information—contact details, preferences, and communication history—enabling personalized and timely interactions.
2. **Property Management:** Enable effective management of property listings, including descriptions, pricing, availability, and documentation for easy tracking and updates.
3. **Lead Tracking:** Implement tools for managing leads, ensuring potential clients are nurtured throughout the sales pipeline.
4. **Task Automation:** Automate routine tasks like scheduling, reminders, and report

generation, freeing up time for more strategic activities.

5. **Reporting and Analytics:** Provide analytics tools to generate reports on sales, client interactions, and property trends to support data-driven decisions.
6. **User-Friendly Interface:** Ensure an intuitive, accessible application so users can leverage features with minimal training.
7. **Integration Capabilities:** Enable seamless integration with existing tools (e.g., email, calendars) for a cohesive workflow.

Salesforce Key Features and Concepts Utilized

- **Lightning Web Component (LWC):** A modern framework for building dynamic, reusable web interfaces in Salesforce. Built on web standards, LWC leverages custom elements, templates, and JavaScript to improve user experience in Salesforce applications.
- **Apex:** Salesforce's strongly typed, object-oriented programming language similar to Java, designed for executing system processes and automation on the Salesforce platform.
- **Approval Process:** An automated workflow for record approval in Salesforce, routing records (e.g., leads, contracts) to designated approvers based on set criteria.
- **Flows:** A visual automation tool that enables complex business processes in Salesforce without code, allowing actions such as record updates, email sending, and more based on inputs, data, or events.

Detailed Steps to Solution Design

1. **JotForm Integration:** A customer information form was integrated with Salesforce to automate customer record creation, capturing essential details for effective client management and tailored recommendations.
Link to the form: <https://form.jotform.com/242993235917063>
2. **Object Creation from Spreadsheet:** Salesforce's Data Import Wizard was used to create objects directly from spreadsheets, streamlining data entry for client management.
3. **JotForm-Salesforce Integration:** Jotform submissions automatically create or update Salesforce records, ensuring real-time data synchronization.
4. **Property Details App:** A custom Lightning app was created to centralize access to client and property data, enhancing the team's efficiency.
5. **Roles and Permissions:** Users, roles, and profiles were established for secure access control.
6. **Approval Process for Property Object:** An approval workflow was set up for property records, enabling transparent management and accountability.
7. **Record Trigger Flow for Approval Automation**
8. **LWC Component:** A Lightning Web Component was deployed on the "Search Your Property" page, ensuring verified users access verified properties only.

Testing and Validation

Rigorous testing was conducted to ensure secure, functional components, enhancing overall user experience through reliable access controls.

Key Scenarios Addressed by Salesforce and Scope of this Project

1. Target Users:

- Real estate agents and brokers
- Property managers
- Marketing teams
- Administrative staff

2. Core Features:

- *Client Database*: Stores client profiles, history, and preferences.
- *Property Listings*: Creates and manages listings with features such as images, descriptions, and availability.
- *Lead Management*: Tools for lead tracking and automated reminders.
- *Communication Tools*: Integrated messaging to facilitate agent-client interactions.
- *Reporting Dashboard*: Visualizes metrics like lead conversion, sales, and client engagement.

3. Integration and Compatibility:

- Integrates with email (Gmail, Outlook), calendars, and marketing tools (Mailchimp).
- Compatible with desktop and mobile devices.

4. Data Security and Privacy:

- Includes data encryption, secure authentication, and compliance with regulations (e.g., GDPR).

5. Customization and Scalability:

- Allows customization for workflows, fields, and reports, with scalability to support growth.

6. Support and Training:

- Provides tutorials, documentation, and customer support, with training for optimal CRM use.

Other Tools

Visual Studio Code (VS Code): A free code editor by Microsoft, popular for its extensions, IntelliSense, Git integration, and real-time collaboration features, making it highly versatile for developers.

JotForm: An online form builder that allows users to create customizable forms to capture information efficiently. In this project, JotForm is integrated with Salesforce to automate customer data collection, streamlining record creation and reducing manual entry, which supports faster responses and optimized workflows in CRM systems.

Conclusion

The integration of Salesforce, with custom Lightning components and approval processes, optimizes operational workflows for Dreams World Properties. Key features such as automated records, verification-based access control, and intuitive search enhance client engagement and property management. Thorough testing ensures secure and reliable functionality, positioning Dreams World Properties for growth while focusing on customer satisfaction and data integrity.

JOTFORM



Dreams World

Name *

First Name

Last Name

Email

example@example.com

Phone Number

Please enter a valid 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

Submit

SUBMISSIONS IN JOTFORM

Jotform

Tables

Dreams World

Last updated at 8:16 PM

Share

Help

P

Dreams World

New Tab

Search

Filter

Columns

Form

Download All

	Submission Date	Name	Email	Phone Number	Which type of pro...	Budget Amount	Address	
1	Oct 30, 2024	Vineela V	vinnu@gmail.com	(987) 654-3214	Commercial	450000	Abc street, abc street...	
+ ADD								

Total 1

Give Feedback

SUBMISSIONS IN SALESFORCE

Property Details

Customer

Property

Search your Property

Search...

Star

+

?

12

Customer

All Records

New

Change Owner

Import

Printable View

Assign Label

Search this list...

4 items

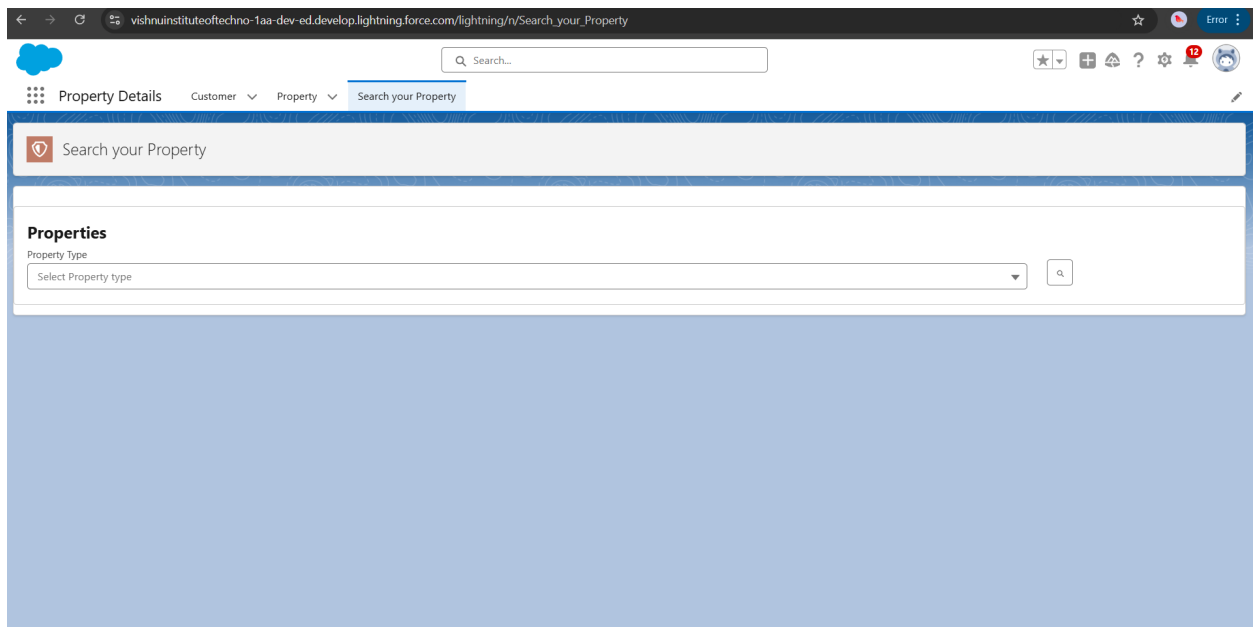
Sorted by Customer

Filtered by All customer

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	Customer	Customer	Phone Number	Email	State	Property Ty...	Budget A...	Street Add...	Street Addr...	City	postal c...
1	a00WU00000KHfS	Rakesh	788797.0	rakesh@gmail.com	Telangana	Residential	40,00,000	gb road	street no 45	Hyderabad	555001
2	a00WU00000KHfT	prakash	55448855	p@gmail.com	Maharashtra	Commercial	80,00,000	gachibowli	indira road	mumbai	6600014
3	a00WU00000KHfU	Prajwal	454545.0	prajwal@gmail.com	Maharashtra	Rental	25,000	kandli	kathora	Amravati	444805
4	V	Vineela	(987) 654-3214	vinnu@gmail.com	AP	Commercial	4,50,000	Abc street	abc street	bhimavaram	544324

LWC COMPONENT



APPROVAL PROCESS

