

# CRM Application to Handle Client and Property-Related Requirements

## 1. Project Overview

This project focuses on the development of a Customer Relationship Management (CRM) application for Dreams World Properties using the Salesforce platform. The CRM system is designed to streamline customer interactions and improve property management efficiency by automating record-keeping and categorizing clients based on approval status. Through this integration, Dreams World Properties enhances its operational workflow, providing tailored property recommendations for approved users, which supports improved customer satisfaction and engagement within the real estate market.

## 2. Objectives

### □ Business Goals:

- Automate customer record creation and categorization within Salesforce to reduce manual data entry and improve data accuracy.
- Enable personalized property recommendations, distinguishing between approved and non-approved users, to enhance customer engagement and satisfaction.

### □ Specific Outcomes:

- Integrate Jotform with Salesforce for seamless customer data capture.
- Create a customized approval process for property listings, ensuring verified listings are prioritized.
- Develop a user-friendly interface and dedicated app page, "Search Your Property," for easier property access.

### 3. Salesforce Key Features and Concepts Utilized

#### ☐ Automated Record Creation:

- Integration with Jotform allows automated record creation in Salesforce, capturing customer details directly from web interactions.

#### ☐ User Segmentation:

- Salesforce categorizes customers as approved or non-approved, ensuring that tailored recommendations are presented based on client status.

#### ☐ Approval Process for Property Listings:

- A streamlined approval workflow manages property listings, allowing admins to approve or reject properties as needed.

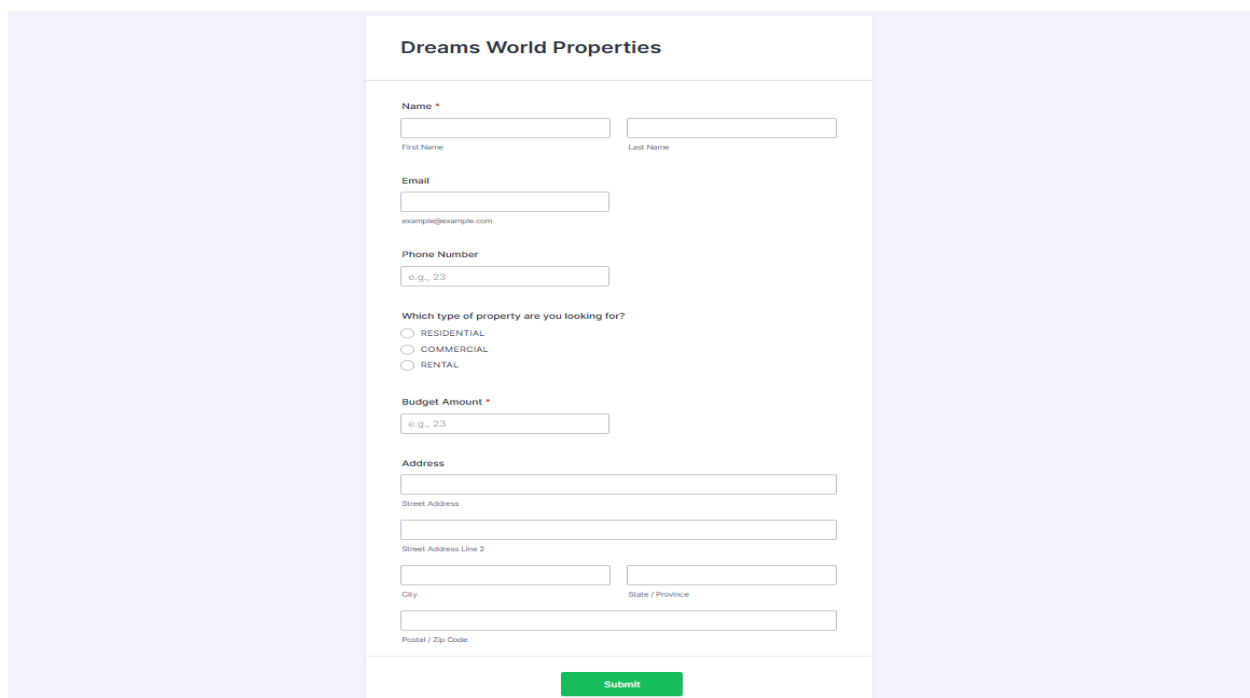
#### ☐ Lightning Web Component (LWC):

- A custom LWC component restricts property access based on client verification, enhancing the experience for authorized users.

### 4. Detailed Steps to Solution Design

#### ☐ Integration with Jotform

- Configure Jotform to capture customer details and link it with Salesforce, enabling automated record creation in the CRM system.
- Set up roles and profiles to define access rights and functionalities for different user types within Salesforce.

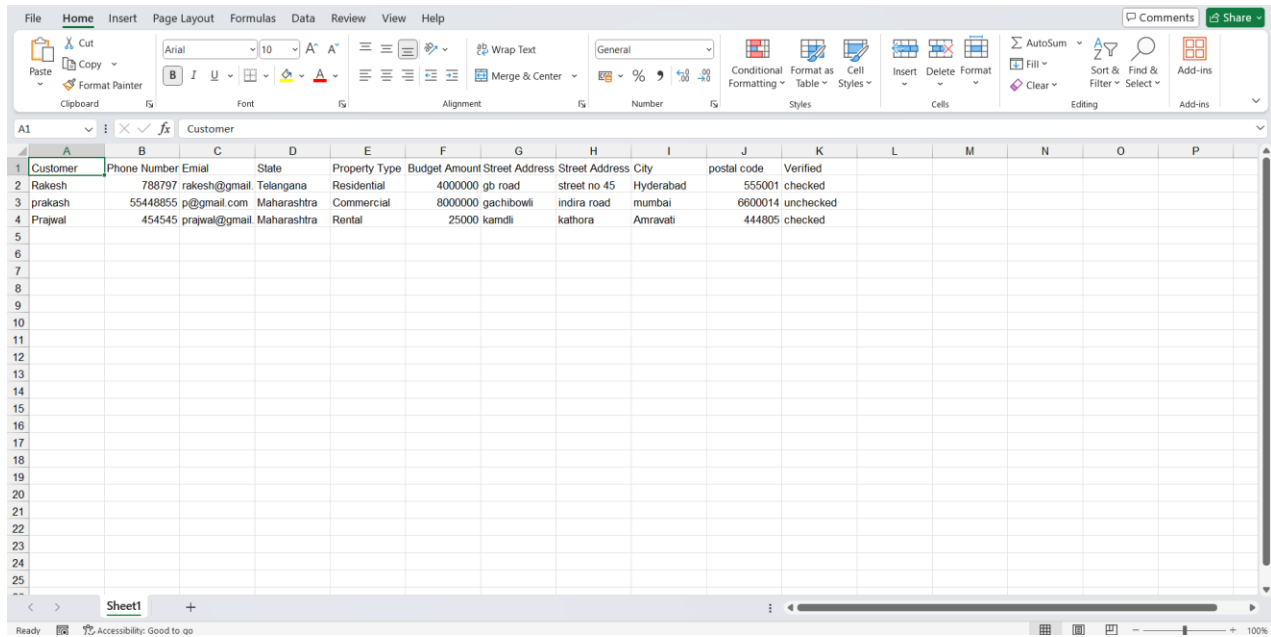


The screenshot displays a web form titled "Dreams World Properties". The form is set against a light blue background and contains the following fields and sections:

- Name \***: Two input fields for "First Name" and "Last Name".
- Email**: A single input field with a placeholder "example@example.com".
- Phone Number**: A single input field with a placeholder "e.g., 23".
- Which type of property are you looking for?**: Three radio button options: "RESIDENTIAL", "COMMERCIAL", and "RENTAL".
- Budget Amount \***: A single input field with a placeholder "e.g., 23".
- Address**: A section containing four input fields: "Street Address", "Street Address Line 2", "City", and "State / Province".
- Postal / Zip Code**: A single input field.
- Submit**: A green button at the bottom center of the form.

## □ Creating Custom Objects from Spreadsheet Data

- Import client and property data directly into Salesforce by creating custom objects from pre-existing spreadsheets. This enhances data handling efficiency.



Customer	Phone Number	Email	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	5544855	p@gmail.com	Maharashtra	Commercial	8000000	gachibowli	indira road	mumbai	6600014	unchecked
Prajwal	454545	prajwal@gmail	Maharashtra	Rental	25000	kamdli	kathora	Amravati	444805	checked

## □ Approval Process and Flow Setup

- Design an approval process for property records, where listings can be approved or rejected based on predefined criteria.
- Implement a record trigger flow that submits property records automatically for approval, simplifying the administrative process.

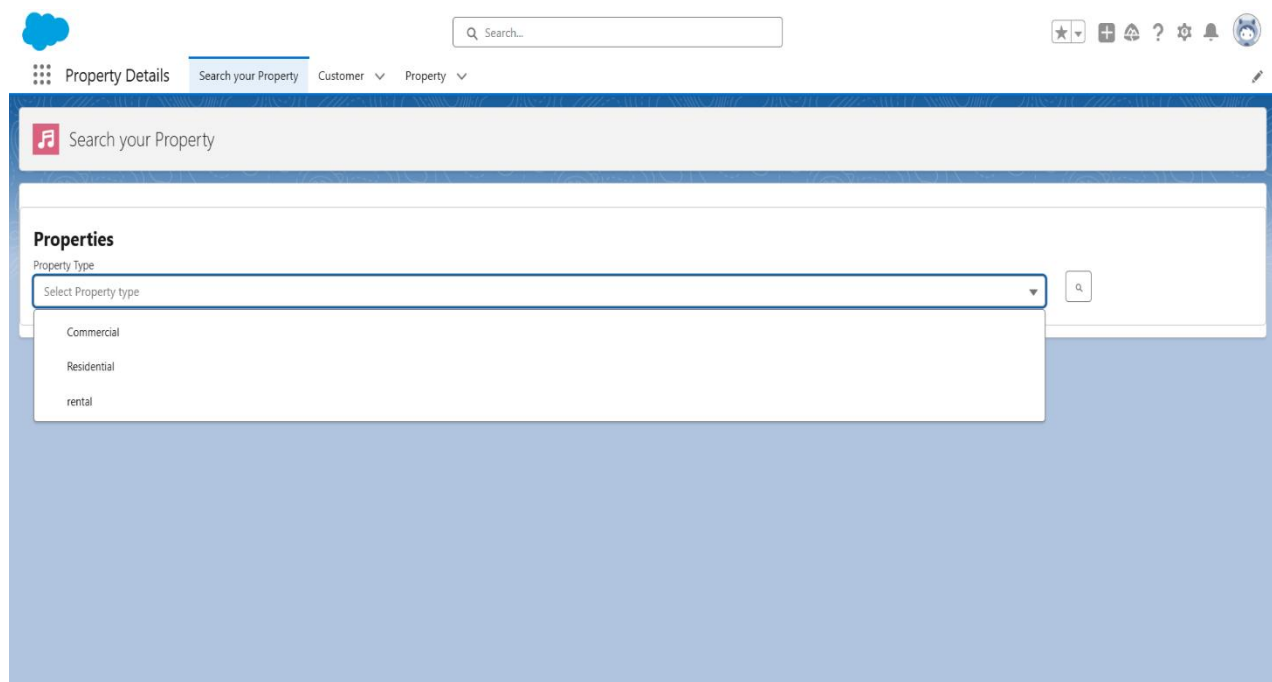


## □ User Role and Profile Creation

- Define roles and profiles tailored to business needs, ensuring appropriate access to property listings and customer details.
- Create checkbox fields to indicate verification status on user records, which guides access control for property data.

## □ User Interface and App Page Development

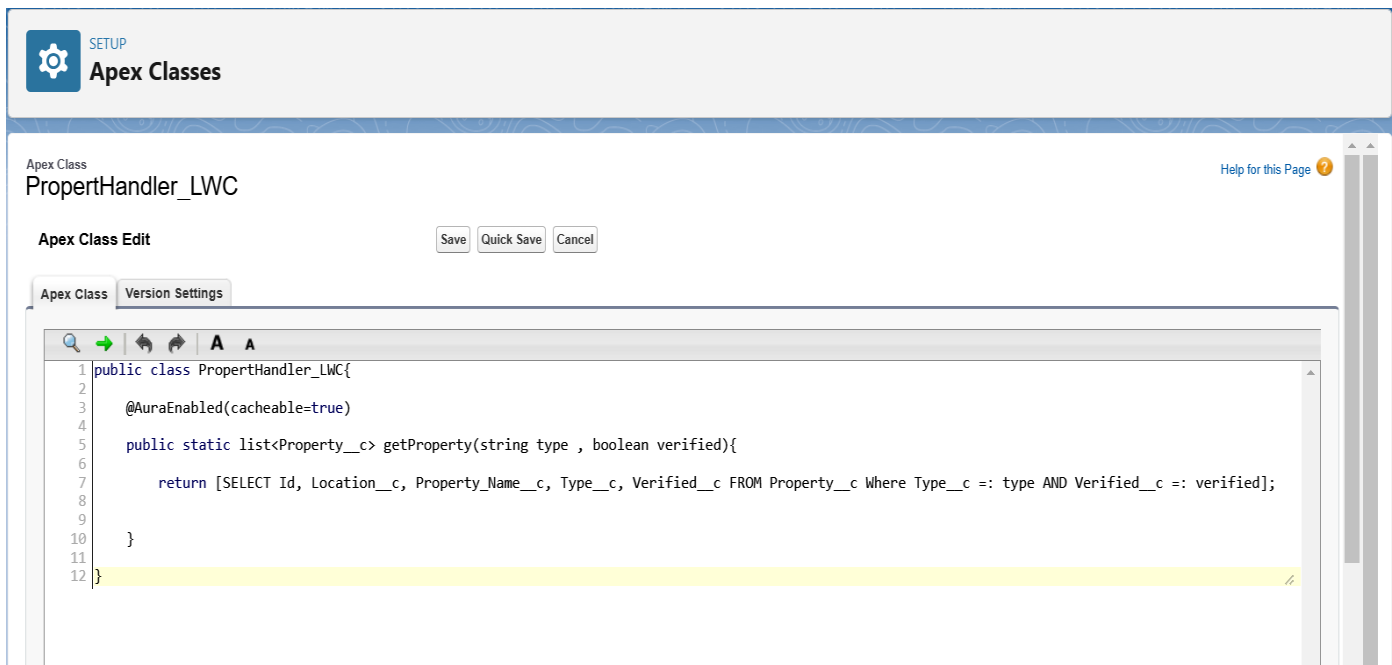
- Design a custom app page, “Search Your Property,” where property listings are displayed.



- Integrate an LWC component on this page, which filters property views for verified and non-verified users, enhancing client-specific content delivery.

#### ☐ Apex Class Security Configuration

- Set security permissions for Apex classes to control access, ensuring only authorized profiles can interact with specific backend functionalities.



## 5. Testing and Validation

#### ☐ Unit Testing:

- Conduct unit tests on Apex classes and triggers to verify accurate data processing and ensure smooth approval workflows.

#### ☐ User Interface Testing:

- Validate the functionality and accessibility of the “Search Your Property” app page and the LWC component to ensure that users only access appropriate data.

## 6. Key Scenarios Addressed by Salesforce in the Implementation Project

### 1. Automated Data Capture:

- Automate customer information entry and categorization in Salesforce upon form submission, reducing manual workload.

### 2. Property Access Control:

- Enable access to property listings based on user verification status, supporting personalized content delivery.

### 3. Approval Workflows:

- Approve or reject property records through a systematic workflow, ensuring only quality listings reach potential clients.

## 7. Conclusion

### Summary of Achievements:

This CRM application for Dreams World Properties successfully integrates Jotform with Salesforce to automate customer data capture and categorize users, delivering personalized property recommendations. By implementing a structured approval process and utilizing LWC components, the project enhances user experience and operational efficiency. This system not only improves customer engagement but also supports scalable growth in the real estate sector, making it a valuable asset for Dreams World Properties.

### Future Enhancements:

Potential improvements include implementing AI-driven property recommendations, adding notifications for approval updates, and integrating additional CRM modules to broaden customer engagement.