


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

1st Task: [Milestone 1 :- Create a Jotform and integrate it with the org to create a record of customers automatically.](#)

Link - <https://form.jotform.com/250553001862044>



Form

Name *

First Name Last Name

Email

example@sample.com

Phone Number

(000) 000-0000

Please enter a valid phone number.

Which type of Property are you looking for?

☐ RESIDENTIAL

☐ COMMERCIAL

☐ RENTAL

Budget Amount *

e.g., 75

Address

Street Address

Street Address Line 2

City State / Province

Postal / Zip Code

Submit

2nd Task: Create Objects from Spreadsheet.

a)Customer

Setup > Object Manager > Customer

Details

Fields & Relationships

20 Items. Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Budget Amount	Budget_Amount__c	Number(18, 0)		
City	City__c	Text(255)		
Created By	CreatedById	Lookup(User)		✓
Created Date	CreatedDate	Date/Time		✓
Customer	Customer__c	Text(255) (External ID)		✓
Customer Status Type	CustomerStatusType	Picklist		
Email	Email__c	Email (External ID)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Last Modified Date	LastModifiedDate	Date/Time		
Name	Name	Text(255)		✓
Owner Name	OwnerId	Lookup(User,Group)		✓
Party	PartyId	Lookup(Individual)		✓

Setup > Object Manager > Customer

Details

Fields & Relationships

20 Items. Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Last Modified Date	LastModifiedDate	Date/Time		
Name	Name	Text(255)		✓
Owner Name	OwnerId	Lookup(User,Group)		✓
Party	PartyId	Lookup(Individual)		✓
Phone Number	Phone_Number__c	Phone		
postal code	postal_code__c	Number(18, 0)		
Property Type	Property_Type__c	Text(255) (Unique Case Insensitive)		✓
State	State__c	Text Area(255)		
Street Address	Street_Address__c	Long Text Area(32768)		
Street Address line 2	Street_Address_line_2__c	Long Text Area(32768)		
Total Life Time Value	TotalLifeTimeValue	Number(9, 0)		
Verified	Verified__c	Checkbox		

b)Property



BUILD

SETTINGS

PUBLISH

Preview Form

EMAILS
Send autoresponders and notifications**CONDITIONS**
Set up conditional logic**THANK YOU PAGE**
Show page after submission**INTEGRATIONS**
Connect your form to other apps**WORKFLOWS**
Turn your form into a workflow**JOTFORM SIGN**
Power your forms with Jotform Sign**SALESFORCE**

Send new leads, contacts, or accounts to your sales CRM

All Actions

See Action Logs

+ Add New Action

1 Create or update a record
Customer

Give Feedback

4th Task: Create Roles

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All Show in tree view

- Salesforce
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - CFO Edit | Del | Assign
 - Add Role
 - COO Edit | Del | Assign
 - Add Role
 - SVP, Customer Service & Support Edit | Del | Assign
 - Add Role
 - Customer Support, International Edit | Del | Assign
 - Add Role
 - Customer Support, North America Edit | Del | Assign
 - Add Role

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP Roles

- Installation & Repair Services Edit | Del | Assign
 - Add Role
- SVP, Human Resources Edit | Del | Assign
 - Add Role
- SVP, Sales & Marketing Edit | Del | Assign
 - Add Role
- VP, International Sales Edit | Del | Assign
 - Add Role
- VP, Marketing Edit | Del | Assign
 - Add Role
- Marketing Team Edit | Del | Assign
 - Add Role
- VP, North American Sales Edit | Del | Assign
 - Add Role
- Director, Channel Sales Edit | Del | Assign
 - Add Role
- Channel Sales Team Edit | Del | Assign
 - Add Role
- Director, Direct Sales Edit | Del | Assign
 - Add Role
- Eastern Sales Team Edit | Del | Assign



←

Lightning App Builder

⚙️ App Settings

📄 Pages

Property Details

?

Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

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 desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

🔍 Type to filter list...

Accounts

All Sites

Alternative Payment Methods

Analytics

App Launcher

Approval Requests

Approval Submission Details

Approval Submissions

Approval Work Items

▶

◀

Selected Items

👤 Customers

🏠 Properties

🔍 Search your Property

⬆

⬇

←

Lightning App Builder

⚙️ App Settings

📄 Pages

Property Details

?

Help

Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

User Profiles

Choose the user profiles that can access this app.

Available Profiles

🔍 Type to filter list...

Analytics Cloud Integration User

Analytics Cloud Security User

Anypoint Integration

Authenticated Website

Authenticated Website

B2B Reordering Portal Buyer Profile

Contract Manager

Cross Org Data Proxy User

Custom: Marketing Profile

▶

◀

Selected Profiles

System Administrator

Customer

Manager

6th Task: Create Profiles

Setup

Home

Object Manager

profiles

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Profiles

Profiles

Help for this Page

All Profiles

Edit

Delete

Create New View

New Profile

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Sales User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Support User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-8 of 8

0 Selected

Previous Next

Page 1 of 1

a) Customer

SETUP

Profiles

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?](#)

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Addresses	<input type="checkbox"/>				<input type="checkbox"/>	
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Authorization Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Data Uses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Texts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Operations	<input type="checkbox"/>					
Business Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Contact Point Phones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Type Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D&B Companies	<input type="checkbox"/>					
Data Use Legal Bases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Purposes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input type="checkbox"/>	<input type="checkbox"/>				
Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>				<input type="checkbox"/>	
Party Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Sellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

b) Manager

SETUP

Profiles

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
error logs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Property	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Sales orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

--None--

Password Policies

User passwords expire in

90 days

Enforce password history

3 passwords remembered

Minimum password length

8

Password complexity requirement

Must include alpha and numeric characters

Password question requirement

Cannot contain password

Maximum invalid login attempts

10

Lockout effective period

15 minutes

Obscure secret answer for password resets

☐

Require a minimum 1 day password lifetime

☐

Don't immediately expire links in forgot

☐

7th Task: Create a Check Box field on user

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

User

Details

Fields & Relationships

User Page Layouts

User Profile Page Layouts

Lightning Record Pages

Buttons and Links

Compact Layouts

Field Sets

Object Limits

Related Lookup Filters

Search Layouts

List View Button Layout

Triggers

Flow Triggers

User Custom Field

Verified

Back to User Fields

Validation Rules

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Verified	Object Name	User
Field Name	Verified	Data Type	Checkbox
API Name	Verified__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Shalini arisethy	Modified By	Shalini arisethy
	02/03/2025, 9:51 pm		02/03/2025, 9:51 pm

General Options

Default Value	Unchecked
---------------	-----------

Validation Rules

No validation rules defined.

Back To Top

Always show me fewer / more records per related list

8th Task: Create Users

Setup Home Object Manager

Q users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?

SETUP Users

New User Reset Password(s) Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	aristhy Shalini	Saris	aristhyshalini@brave-koala-v6un6.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Brown Courtney	cbro	aristhyshalini@buddh822022.com	Manager	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattv.00d5p00000l@yeax.4urdkgakid3@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Customer	cust	cust@yourcompany.com	Customer	<input checked="" type="checkbox"/>	Customer
<input type="checkbox"/> Edit	Customer2	cust	cust2@yourcompany.com	Customer	<input checked="" type="checkbox"/>	Customer
<input type="checkbox"/> Edit	Executive	exec	exec@yourcompany.com	Sales Executive	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Manager	mana	managers@yourcompany.com	Sales Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5p00000l@yeax.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5p00000l@yeax.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	Wheeler Allison	awhee	aristhyshalini@gmail.com	VP, North American Sales	<input type="checkbox"/>	Standard Platform User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

User1 - Executive


SETUP Users

User Detail

Edit Sharing Reset Password Freeze View Summary

Name	Executive	Role	Sales Executive
Alias	exec	User License	Salesforce
Email	exec@yourcompany.com Verify i	Profile	System Administrator
Username	exec@yourcompany.com	Active	<input checked="" type="checkbox"/>
Nickname	User17409290921582746845 i	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"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Currency	INR - Indian Rupee	Data.com User Type	i
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> i

User2 - Manager



SETUP

Users

User Detail

Edit

Sharing


Reset Password

Freeze

View Summary

Name	Manager	Role	Sales Manager
Alias	mana	User License	Salesforce Platform
Email	managers@yourcompany.com Verify i	Profile	Manager
Username	managers@yourcompany.com	Active	<input checked="" type="checkbox"/>
Nickname	User17409294009363703746 i	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"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Currency	INR - Indian Rupee	Data.com User Type	i
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> i

User3 - Customer



SETUP

Users

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Customer	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	cust@yourcompany.com Verify i	Profile	Customer
Username	cust@yourcompany.com	Active	<input checked="" type="checkbox"/>
Nickname	User17409306501488376311 i	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"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Currency	INR - Indian Rupee	Data.com User Type	i
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> i

User4 - Customer2

SETUP

Users

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Customer2	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	cust2@yourcompany.com [Verify] i	Profile	Customer
Username	cust2@yourcompany.com	Active	<input checked="" type="checkbox"/>
Nickname	User17409307105998590621 i	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"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Currency	INR - Indian Rupee	Data.com User Type	i
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> i

9th Task: Create an Approval Process for Property Object

Setup

Home

Object Manager

approval

Data

Mass Transfer

Approval Requests

Feature Settings

Approval Settings

Approval Processes

Didn't find what you're looking for?

Try using Global Search.

Approval Processes

Property: Property Approval

Back to Approval Process List

Process Definition Detail

Edit

Clone

Deactivate

Process Name	Property Approval	Active	<input checked="" type="checkbox"/>
Unique Name	Property_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description	(Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS False)		
Entry Criteria	Administrator OR Current Approver		
Record Editability	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>	
Approval Assignment Email Template	Property Owner, Role: Sales Manager		
Initial Submitters	Created By	Modified By	
	Shalini arisethy, 02/03/2025, 9:34 pm	Shalini arisethy, 02/03/2025, 9:55 pm	

Initial Submission Actions

Add Existing

Add New



SETUP

Users

User Detail

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Executive	Role	Sales Executive
Alias	exec	User License	Salesforce
Email	exec@yourcompany.com [Verify] i	Profile	System Administrator
Username	exec@yourcompany.com	Active	<input checked="" type="checkbox"/>
Nickname	User17409290921582746845 i	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"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Currency	INR - Indian Rupee	Data.com User Type	i
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> i



SETUP

Field Updates

Field Update

Verified Property

[Help for this Page](#) [?](#)[Rules Using This Field Update \(0\)](#) | [Approval Processes Using This Field Update \(1\)](#) | [Entitlement Processes Using This Field Update \(0\)](#)

Field Update Detail

[Edit](#) [Delete](#)

Name	Verified Property
Unique Name	Verified_Property
Description	
Object	Property
Field to Update	Property: Verified
Field Data Type	Checkbox
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	True

[Edit](#) [Delete](#)

Rules Using This Field Update

[Rules Using This Field Update Help](#) [?](#)

SETUP

Field Updates

Field Update

Unverified Property

[Help for this Page](#) [?](#)[Rules Using This Field Update \(0\)](#) | [Approval Processes Using This Field Update \(1\)](#) | [Entitlement Processes Using This Field Update \(0\)](#)

Field Update Detail

[Edit](#) [Delete](#)

Name	Unverified Property
Unique Name	Unverified_Property
Description	
Object	Property
Field to Update	Property: Verified
Field Data Type	Checkbox
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	False

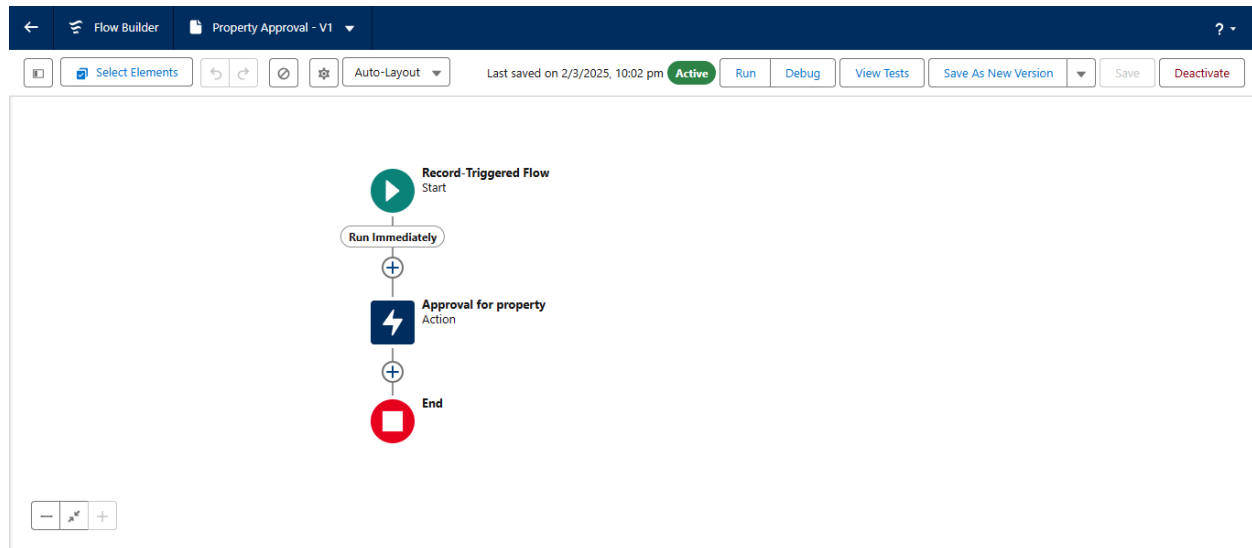
[Edit](#) [Delete](#)

Rules Using This Field Update

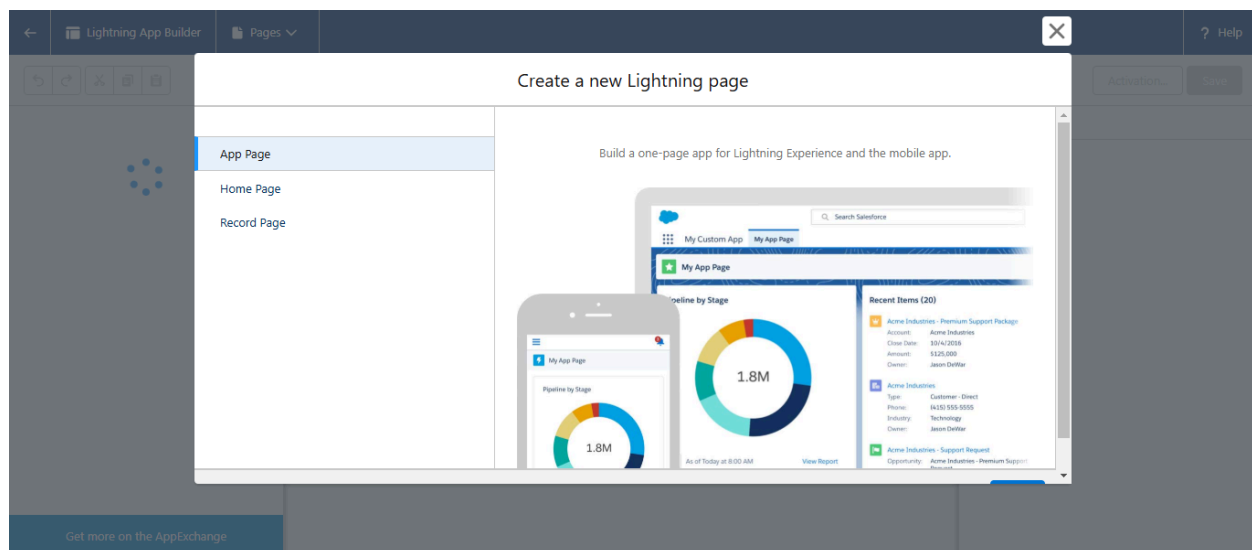
[Rules Using This Field Update Help](#) [?](#)

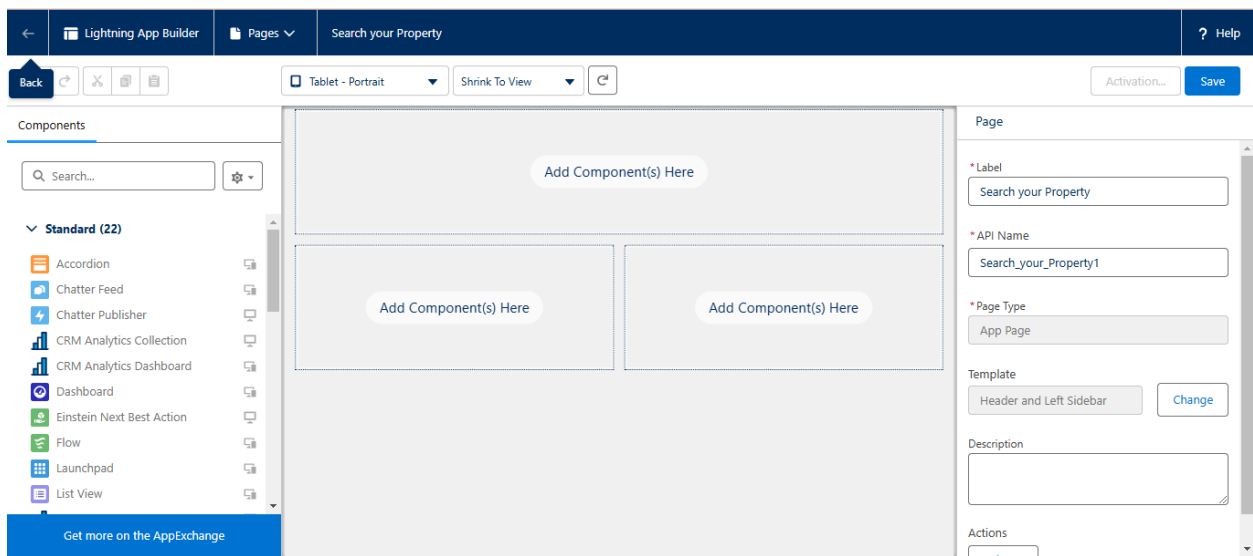
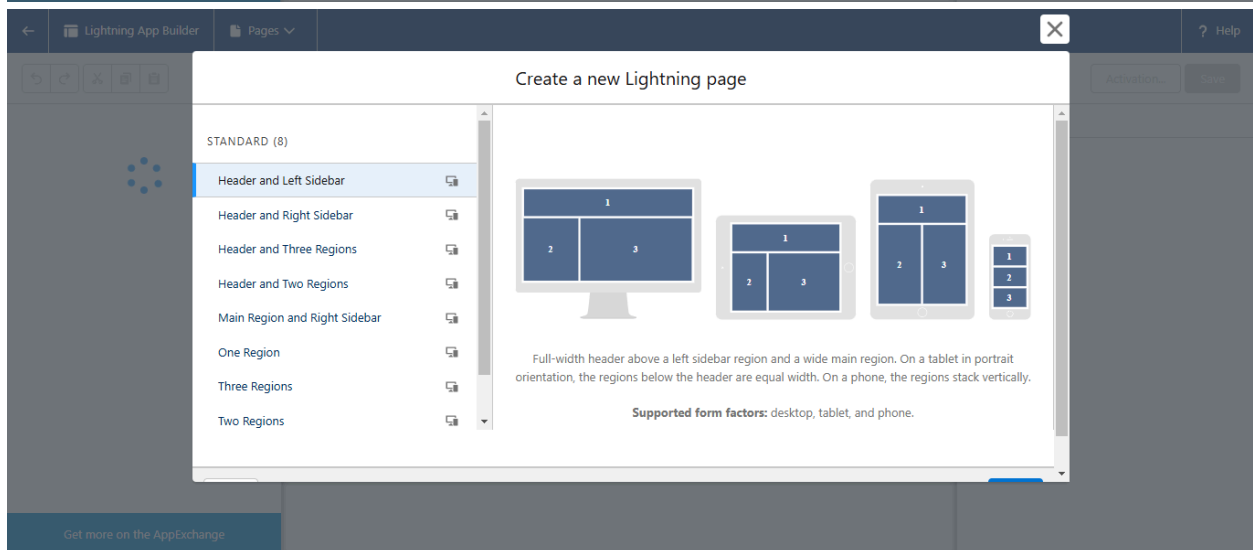
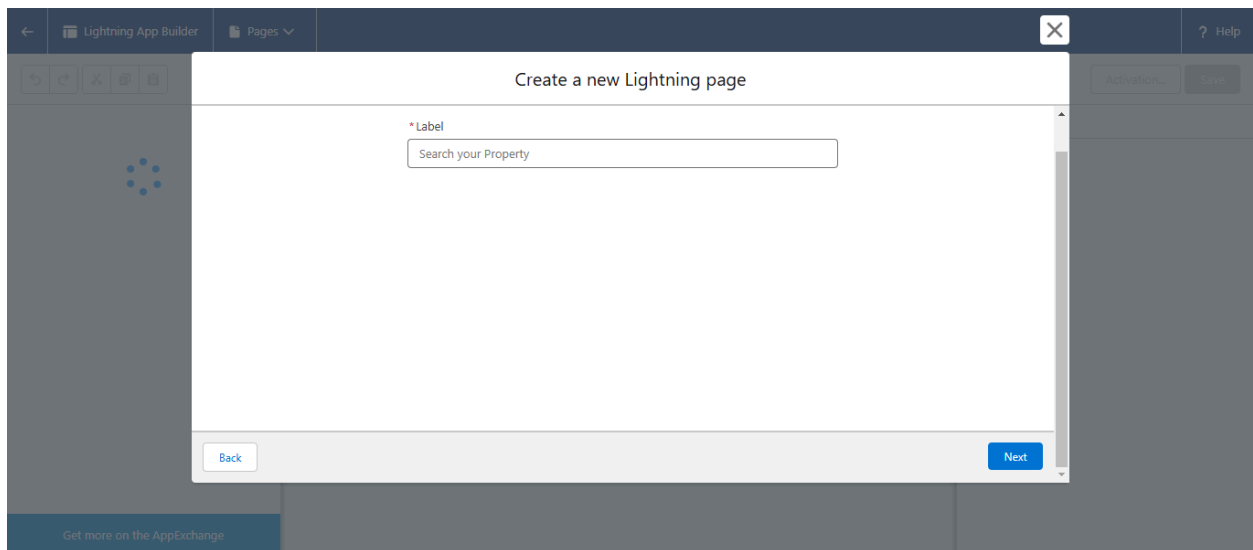
This field update is currently not used by any rules.

10th Task: Create a Record trigger flow to submit the Approval Process Automatically.



11th Task: Create an App Page





Activation: Search your Property

PAGE SETTINGS
LIGHTNING EXPERIENCE
MOBILE NAVIGATION

Give this app page a name, set the page visibility, and choose an icon.

Name

Enter a name for your page.

Icon

Choose an icon to represent your app in Lightning Experience and the mobile app.

Change...

Page Activation

When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup.

☒ Activate for all users
☐ Activate for system administrators only

To set further restrictions on who sees this page, use permission sets and

Cancel Save

Activation: Search your Property

PAGE SETTINGS
LIGHTNING EXPERIENCE
MOBILE NAVIGATION

Add this app page to Lightning Experience apps. You can manage Lightning apps in Setup.

Add to Lightning Apps

LightningInstrumentation
MSJ App
Property Details ✓
Sales
Sales Console
Salesforce CMS

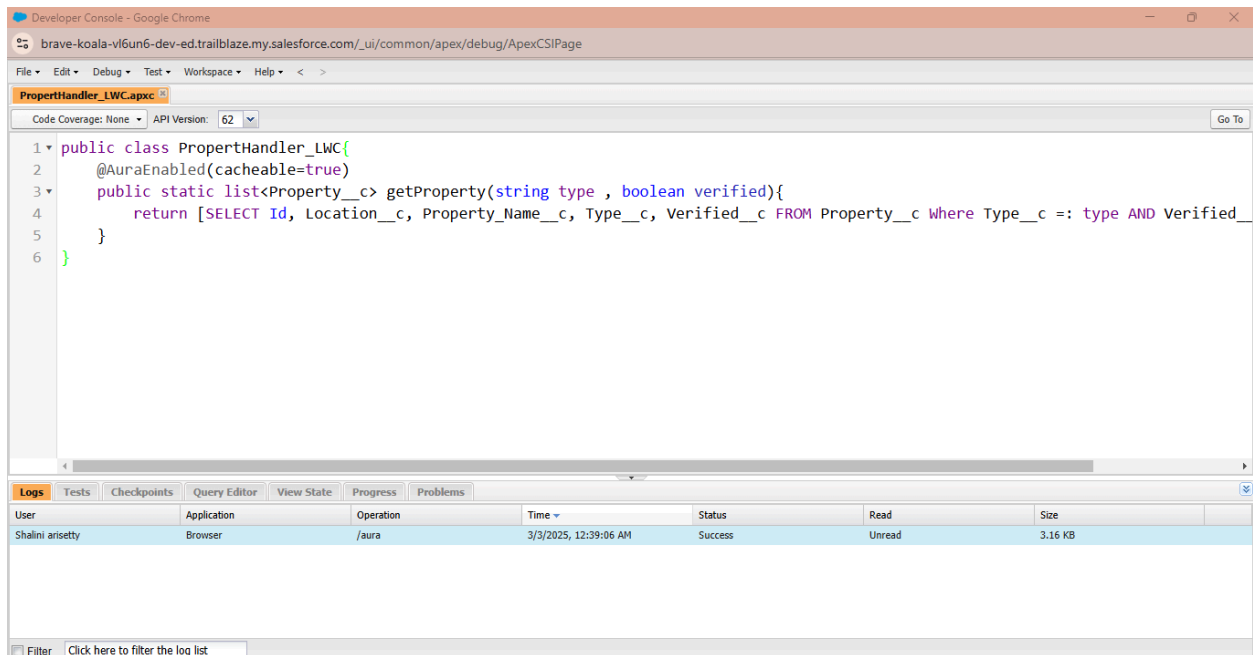
Property Details Remove page

Customers
Search your Property ↑↓
Properties
Search your Property

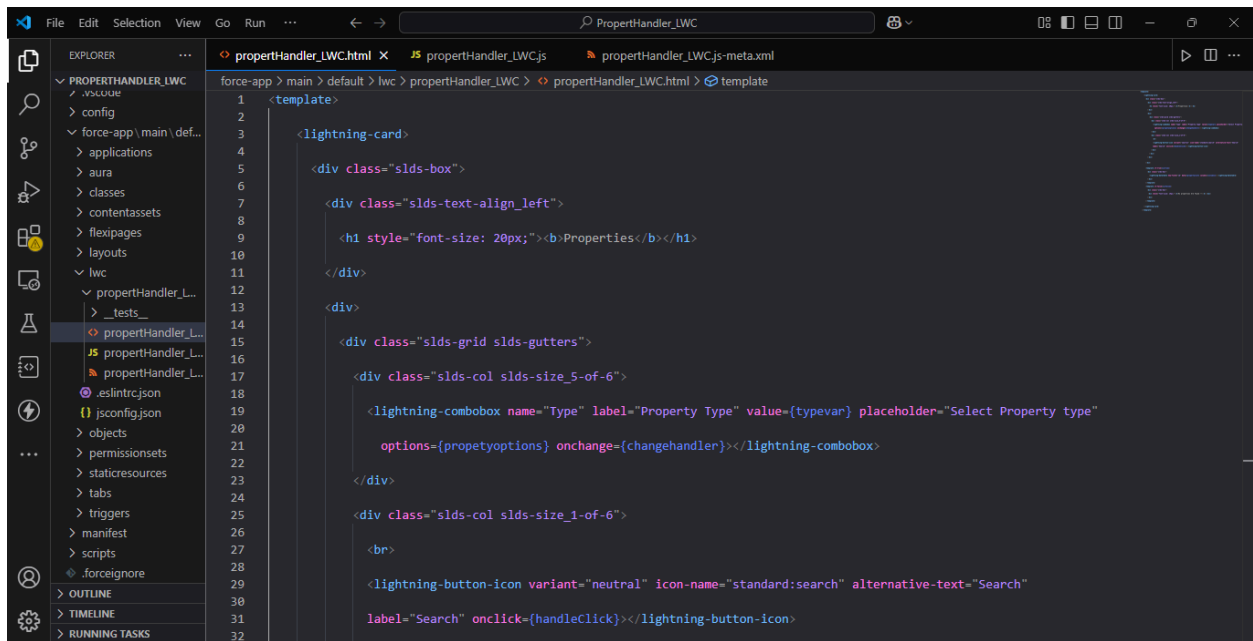
Cancel Save

12th Task: Create a LWC Component

1. Create an Apex Class and make it aura enabled and name it "PropertHandler_LWC"



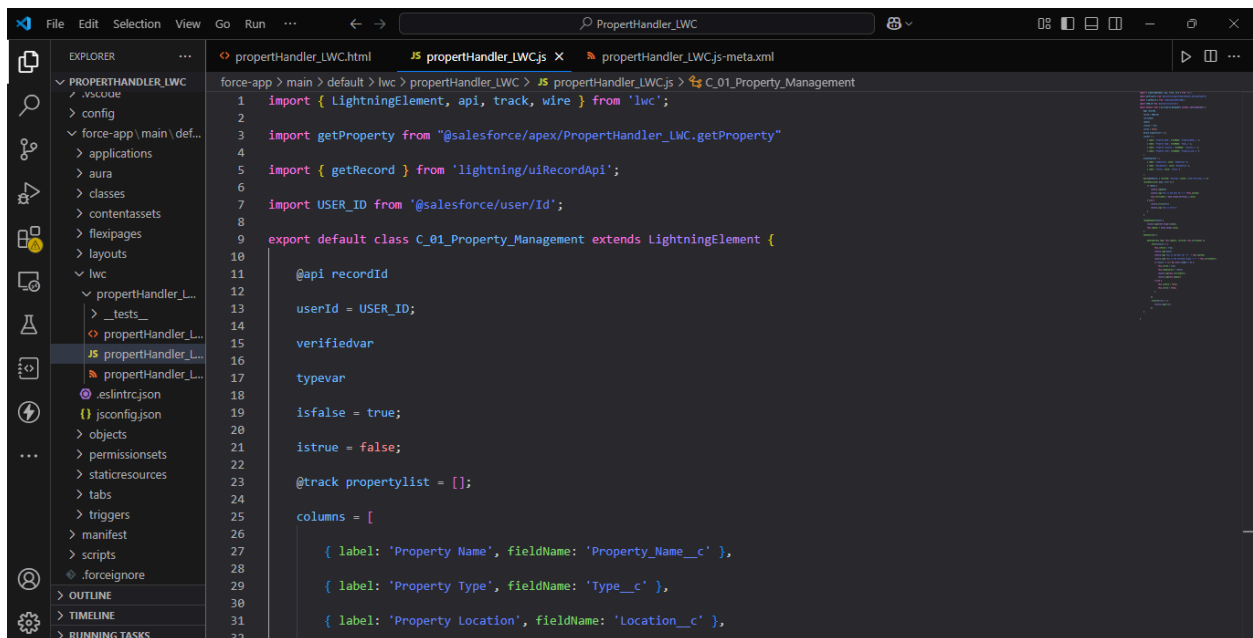
2. Create a Lightning Web Component in your VsCode, and (ctrl+shift +P) and click on authorize an org.
3. Enter your login id and password to authorize your org.
4. Now (ctrl+shift +P) and Create a lightning Web Component and Name it Anything you want to. (Example -)
5. In your Html File Write this code : -



The screenshot shows the Visual Studio Code editor with the 'PropertyHandler_LWC.html' file open. The Explorer sidebar on the left shows the project structure, including the 'PropertyHandler_LWC' folder and its sub-files. The main editor area displays the HTML template code, which includes a Lightning Card, a text-align-left div, a heading, a grid container, a combobox, and a search button.

```
1 <template>
2
3 <lightning-card>
4
5 <div class="slds-box">
6
7 <div class="slds-text-align_left">
8
9 <h1 style="font-size: 20px;"><b>Properties</b></h1>
10
11 </div>
12
13 <div>
14
15 <div class="slds-grid slds-gutters">
16
17 <div class="slds-col slds-size_5-of-6">
18
19 <lightning-combobox name="Type" label="Property Type" value={typevar} placeholder="Select Property type"
20 options={propetyoptions} onchange={changehandler}></lightning-combobox>
21
22 </div>
23
24 <div class="slds-col slds-size_1-of-6">
25
26 <br>
27
28 <lightning-button-icon variant="neutral" icon-name="standard:search" alternative-text="Search"
29 label="Search" onclick={handleClick}></lightning-button-icon>
30
31
32
```

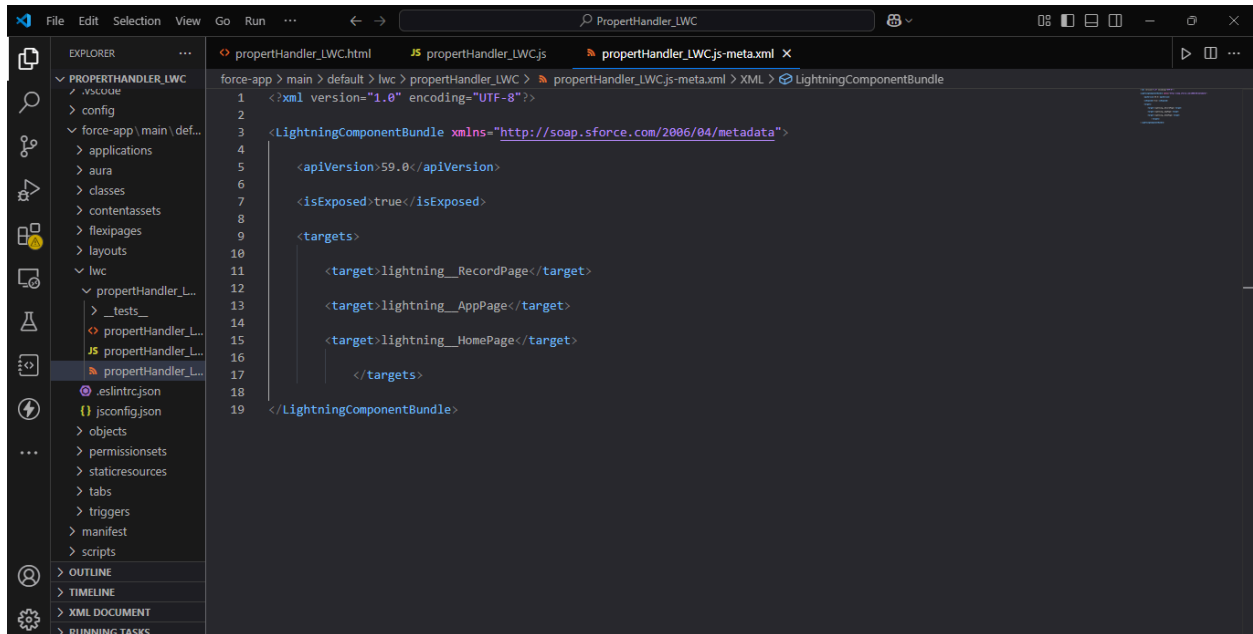
6. In Your Js File Write this code :-



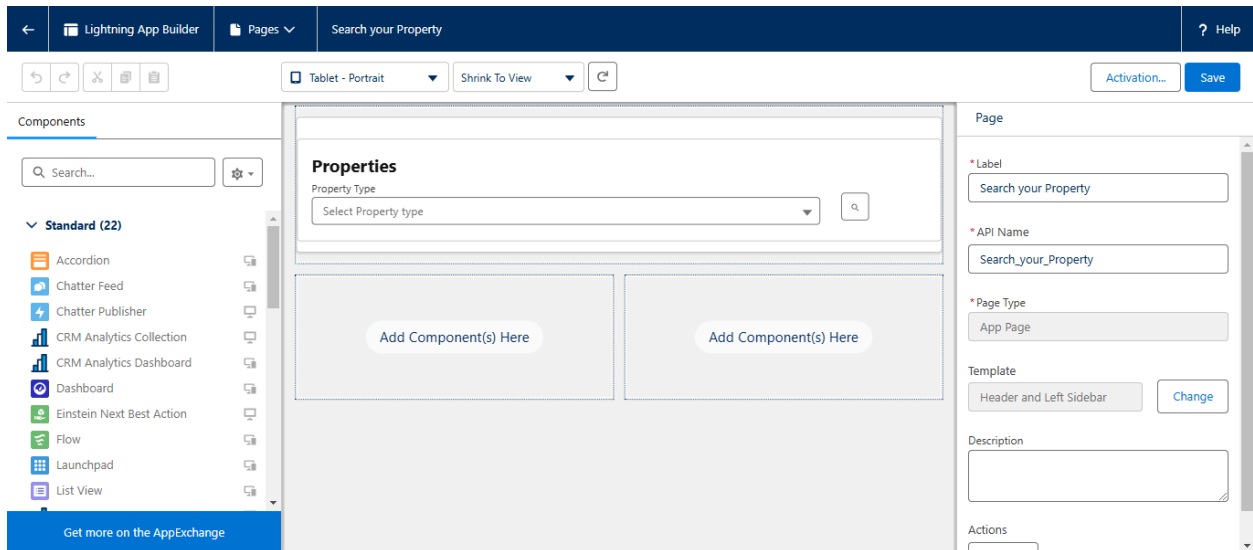
The screenshot shows the Visual Studio Code editor with the 'PropertyHandler_LWC.js' file open. The Explorer sidebar on the left shows the project structure, including the 'PropertyHandler_LWC' folder and its sub-files. The main editor area displays the JavaScript code, which includes imports for LightningElement, api, track, wire, and a class definition for C_01_Property_Management.

```
1 import { LightningElement, api, track, wire } from 'lwc';
2
3 import getProperty from "@salesforce/apex/PropertyHandler_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
```

7. In Your metafile give your targets to deploy the component.



13th Task: Drag this Component to your App Page



14th Task: Give Access of Apex Classes to Profiles

Setup

Home

Object Manager

apex class

Custom Code

Apex Classes

Didn't find what you're looking for?

Try using Global Search.

Apex Classes

Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Lightning Platform.

Percent of Apex Used: 0.24%

You are currently using 14,655 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Estimate your organization's code coverage

Compile all classes

View: All Create New View

Developer Console

New

Generate from WSDL

Run All Tests

Schedule Apex

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del Security	ParkLocator		55.0	Active	207	Shalini.aristhy, 22/12/2023, 9:29 pm	<input type="checkbox"/>
Edit Del	ParkLocatorTest		55.0	Active	381	Shalini.aristhy, 22/12/2023, 9:29 pm	<input type="checkbox"/>
Edit Del Security	ParkService		59.0	Active	2,122	Shalini.aristhy, 22/12/2023, 9:28 pm	<input type="checkbox"/>
Edit Del	ParkServiceMock		55.0	Active	586	Shalini.aristhy, 22/12/2023, 9:29 pm	<input type="checkbox"/>
Edit Del Security	Properthandler_LWC		62.0	Active	303	Shalini.aristhy, 03/03/2025, 12:31 am	<input type="checkbox"/>

Dynamic Apex Classes

Setup

Home

Object Manager

apex class

Custom Code

Apex Classes

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Profiles

Enable Profile Access for Apex Class

Properthandler_LWC

Save Cancel

Available Profiles

Enabled Profiles

Analytics Cloud Integration User

Analytics Cloud Security User

Anypoint Integration

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

Add

Remove

Customer Manager