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

# Project Overview

This project is focused on a CRM Application to Handle the Clients and their property Related Requirements, designed to address the complexity and diversity of client requirements.The goal is to deliver a comprehensive solution by Salesforce as the primary technology platform. Through this project, we aim to enhance operational efficiency, user experience, and data accuracy and support the long-term goals of our real estate business.

**Business Goals**:

1. **Improve Client Satisfaction:** Increase client satisfaction scores by 20% within one year.
2. **Enhance Operational Efficiency:** Reduce administrative tasks by 30% through automation.
3. **Boost Sales Performance:** Increase property sales by 15% in six months.

**Specific Outcomes:**



1. **Centralized Client Data:** Achieve 100% data accuracy and accessibility.
2. **Automated Workflows**: Reduce manual data entry errors by 25%.
3. **Custom Reports and Dashboards:** Provide real-time analytics to support decision-making.

# Centralized Client Data: Achieve 100% data accuracy and accessibility.

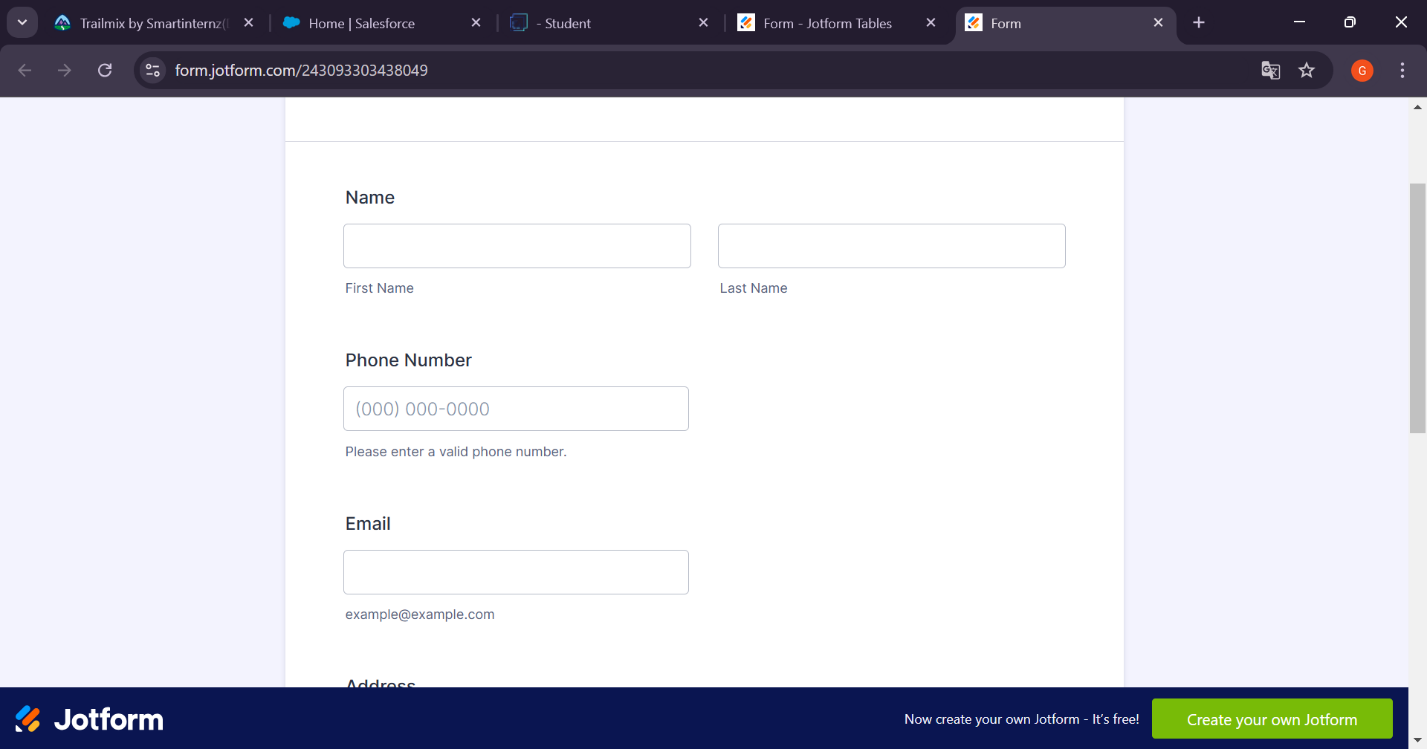
Our CRM project has successfully achieved several key milestones. We ensured 100% data accuracy and accessibility through centralized client data management. Automated workflows were implemented to streamline tasks, resulting in a 25% reduction in manual data entry errors. Additionally, we provided custom reports and dashboards that offer real-time analytics, supporting insightful decision-making.

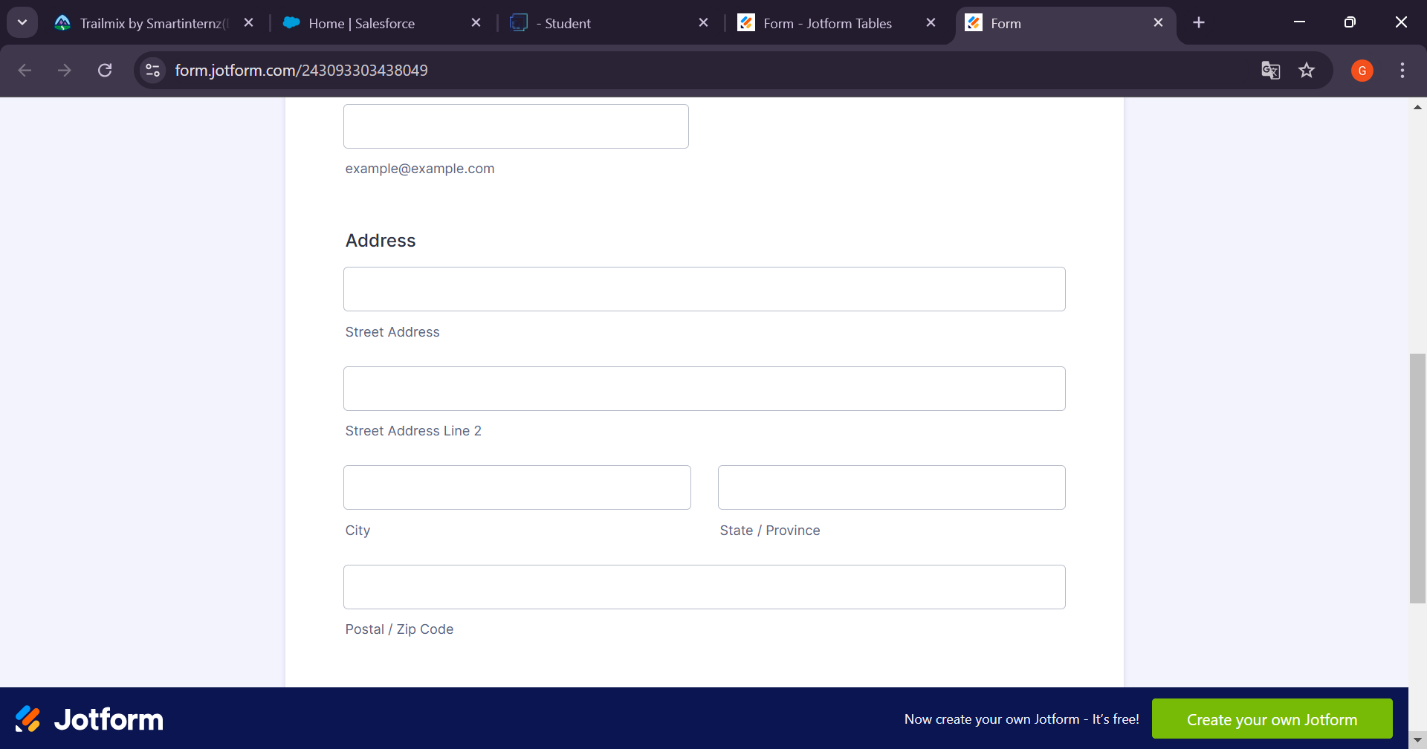
# Salesforce Key Features and Concepts Utilized

Our CRM project leverages several key Salesforce features to enhance its functionality. Custom Objects and Fields provide tailored data structures for managing clients and properties. Automated Workflows streamline tasks and processes using Workflow Rules and Process Builder, while Reports and Dashboards offer real-time analytics for insightful decision-making. Apex and Triggers introduce custom logic to enhance functionality and automate complex processes. Robust Security Features ensure role-based access control and data protection. Integration Capabilities allow for seamless integration with external systems and third-party applications, and User Interface Customization offers personalized page layouts and record types for an improved user experience.

# Detailed Steps to Solution Design

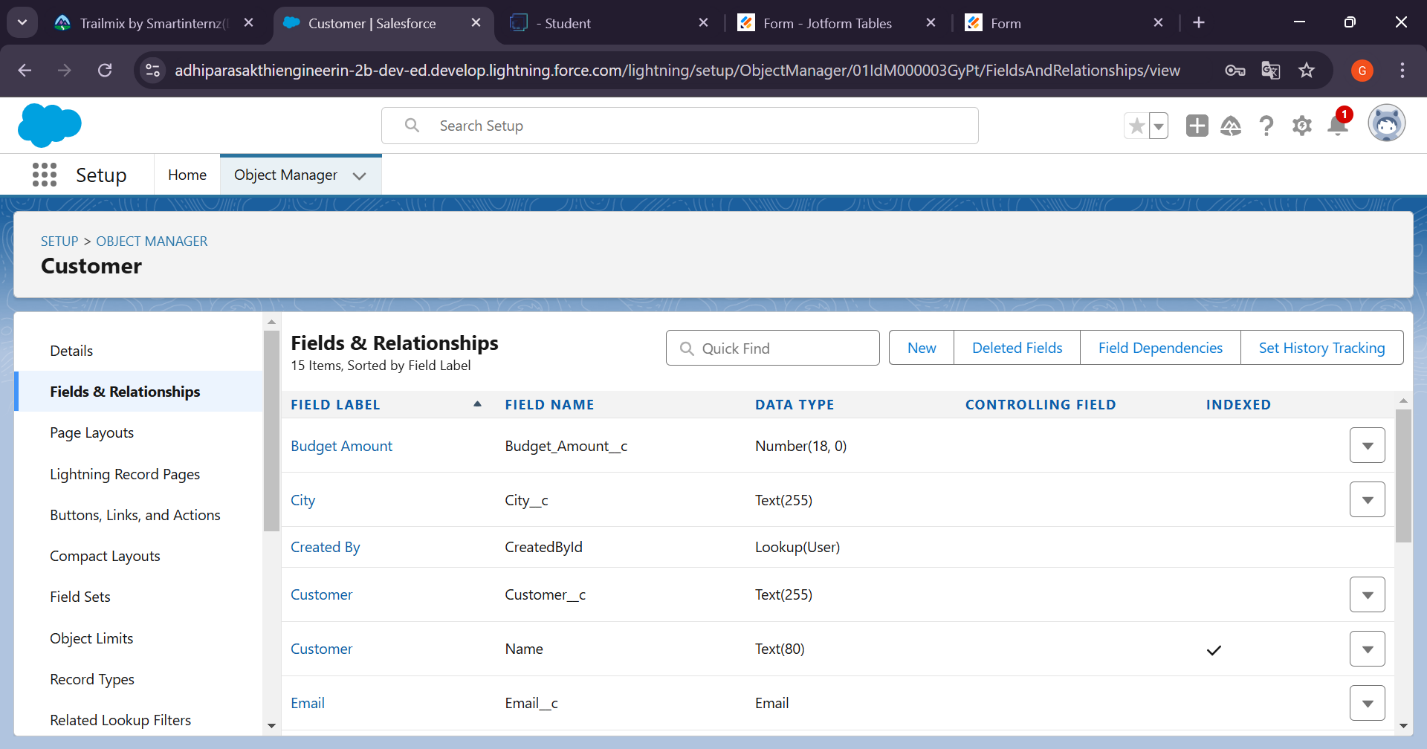
**Step 1: Create a Jotform and integrate it with the org to create a record of customers automatically.**

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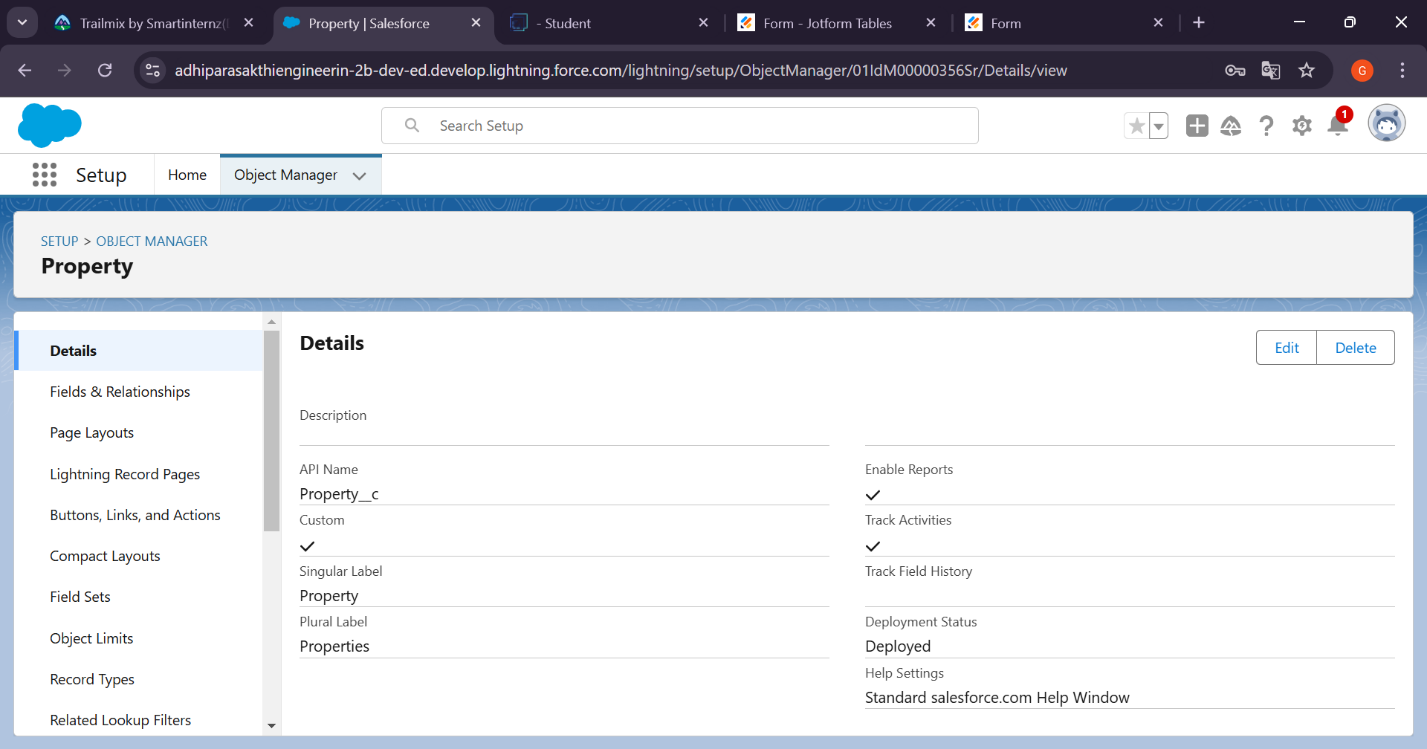
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**Step 2: Create Objects from Spreadsheet.**

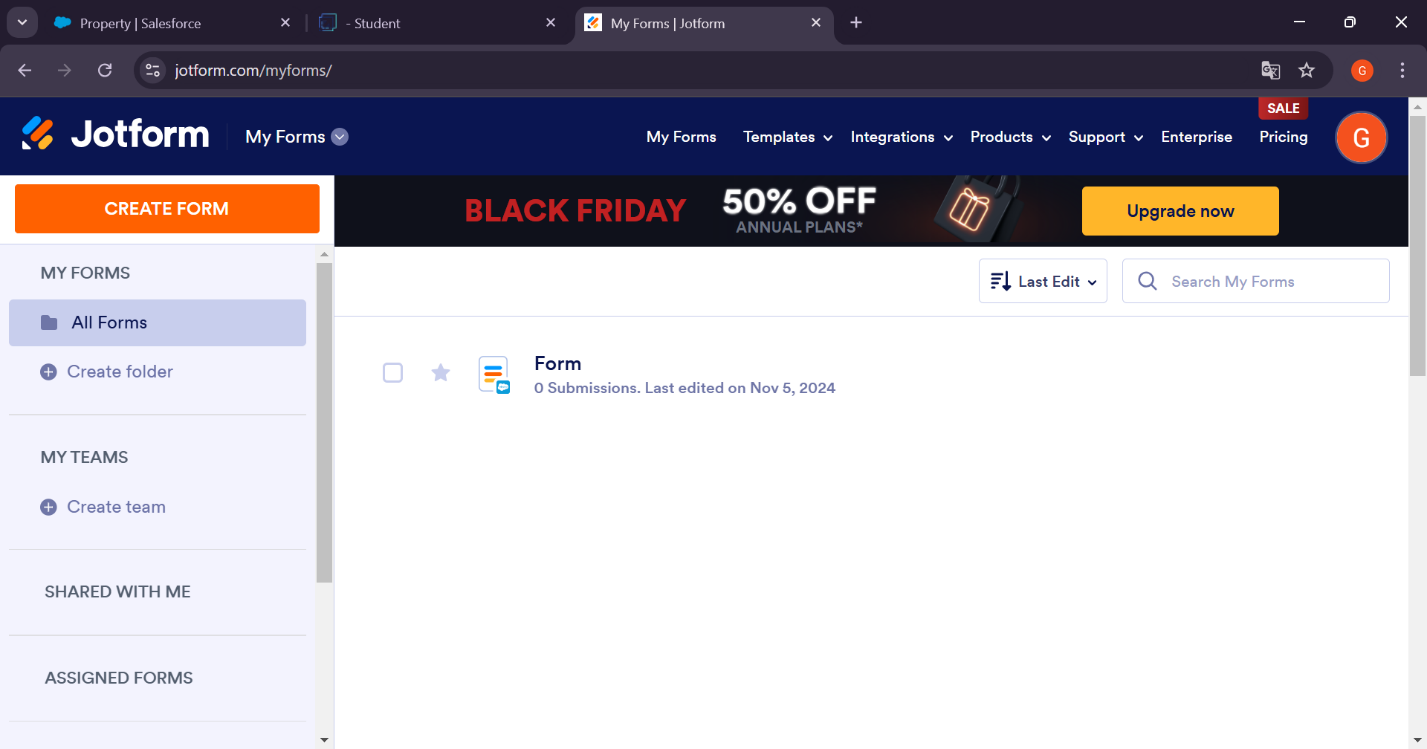
**Create Customer object**

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**Create Property object**

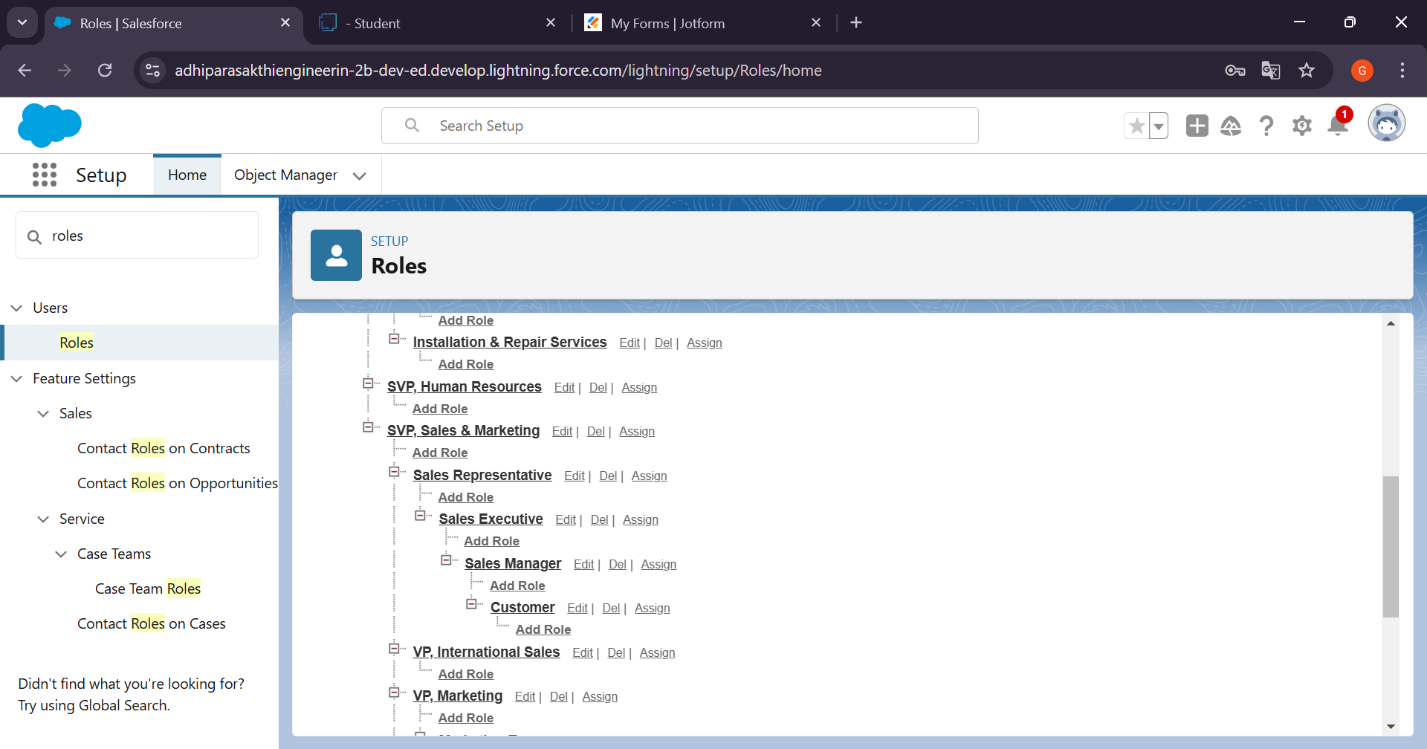


**Step 3: Integrate Jotform with Salesforce Platform**

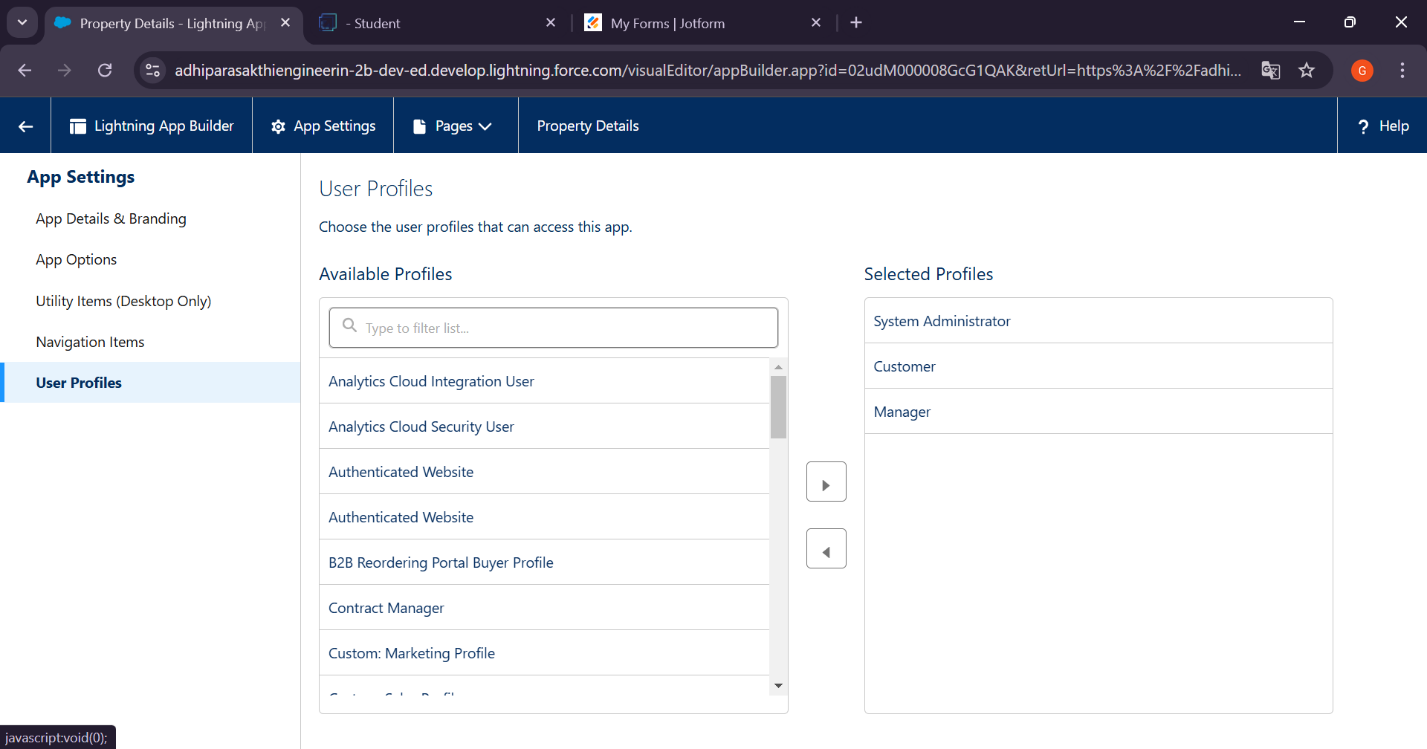
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**Step 4: Create Roles**

**Sales Executive Role**

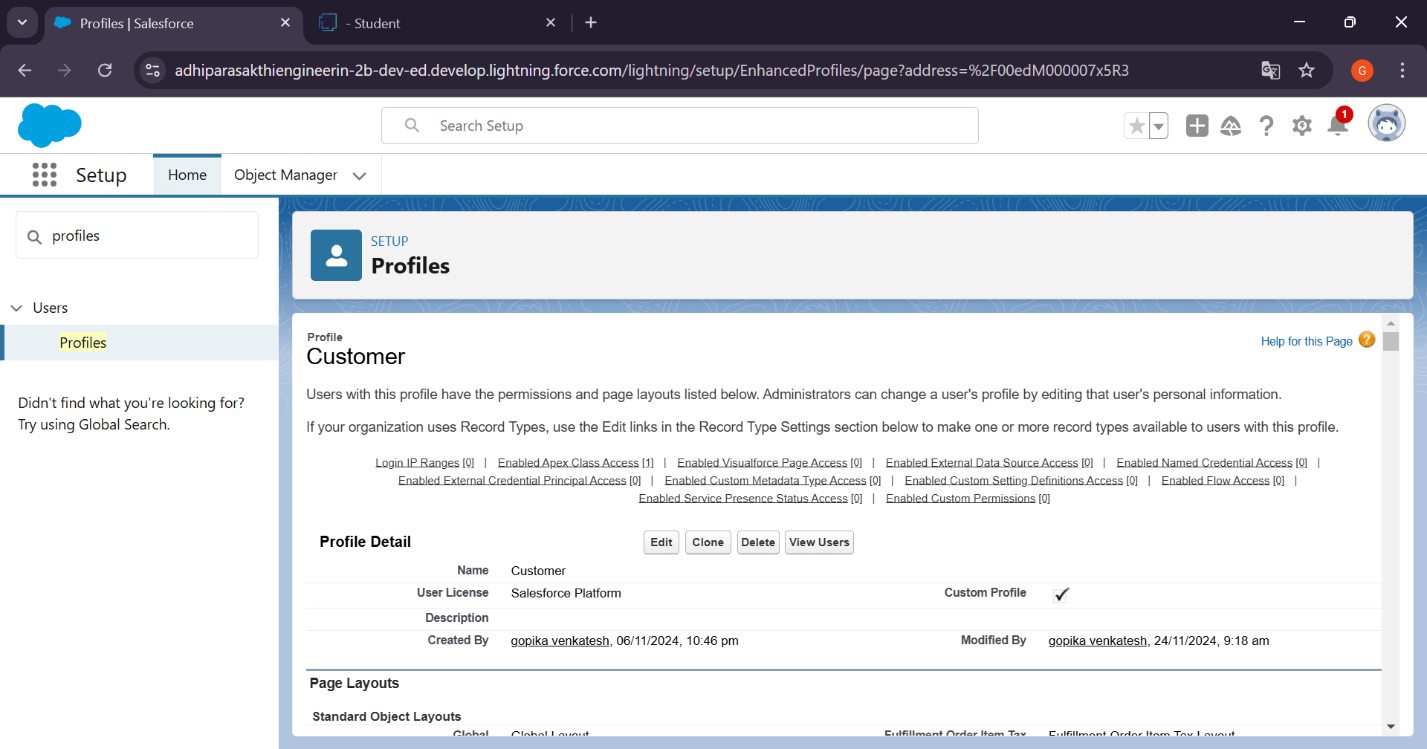
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**Step 5: Create a Property Details App**

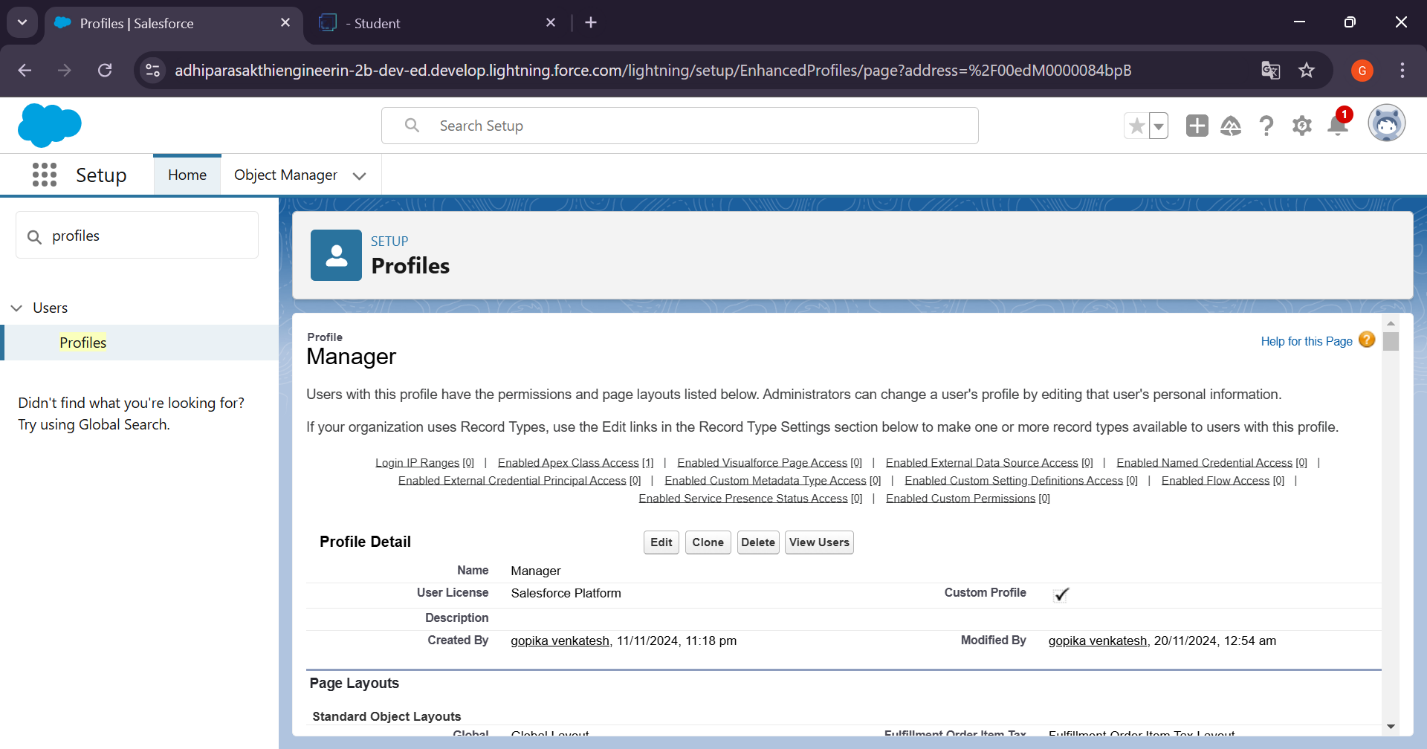
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**Step 6: Create Profiles**

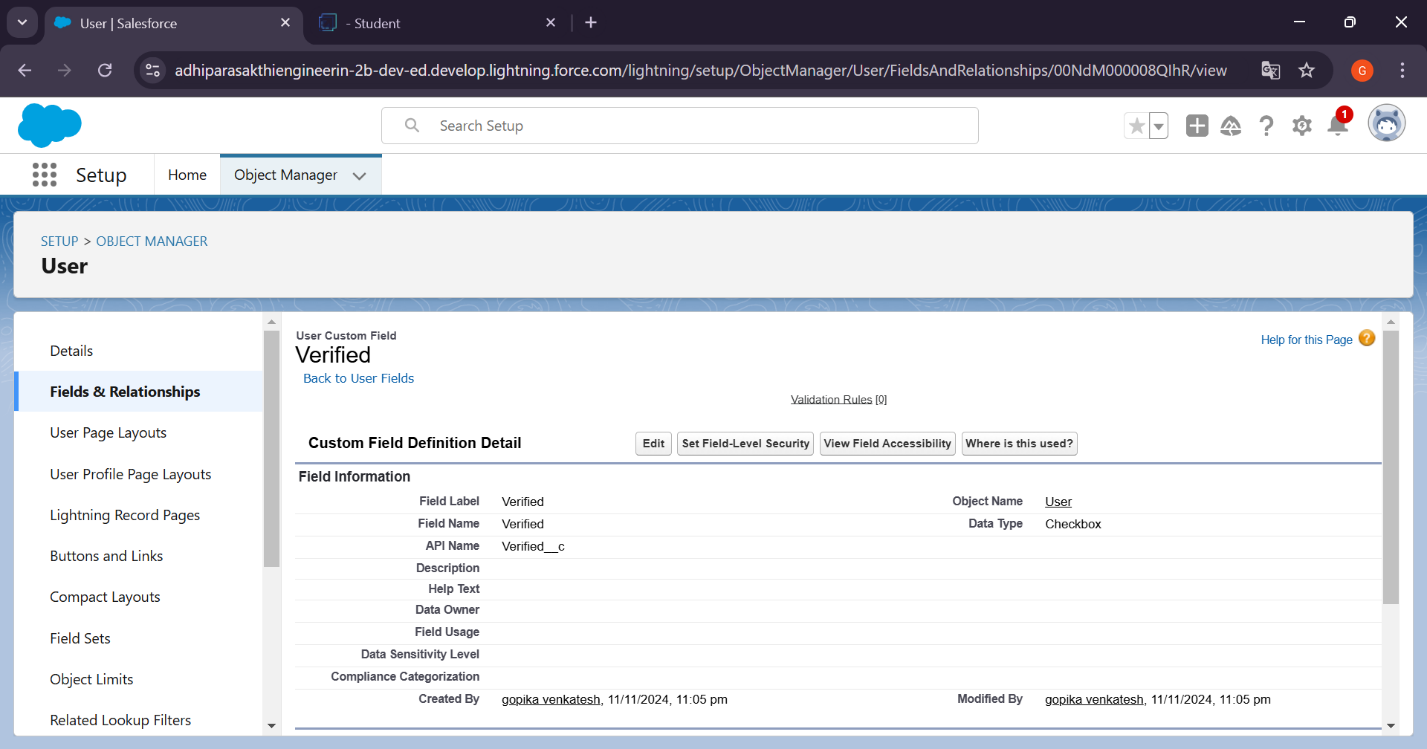
**Customer**

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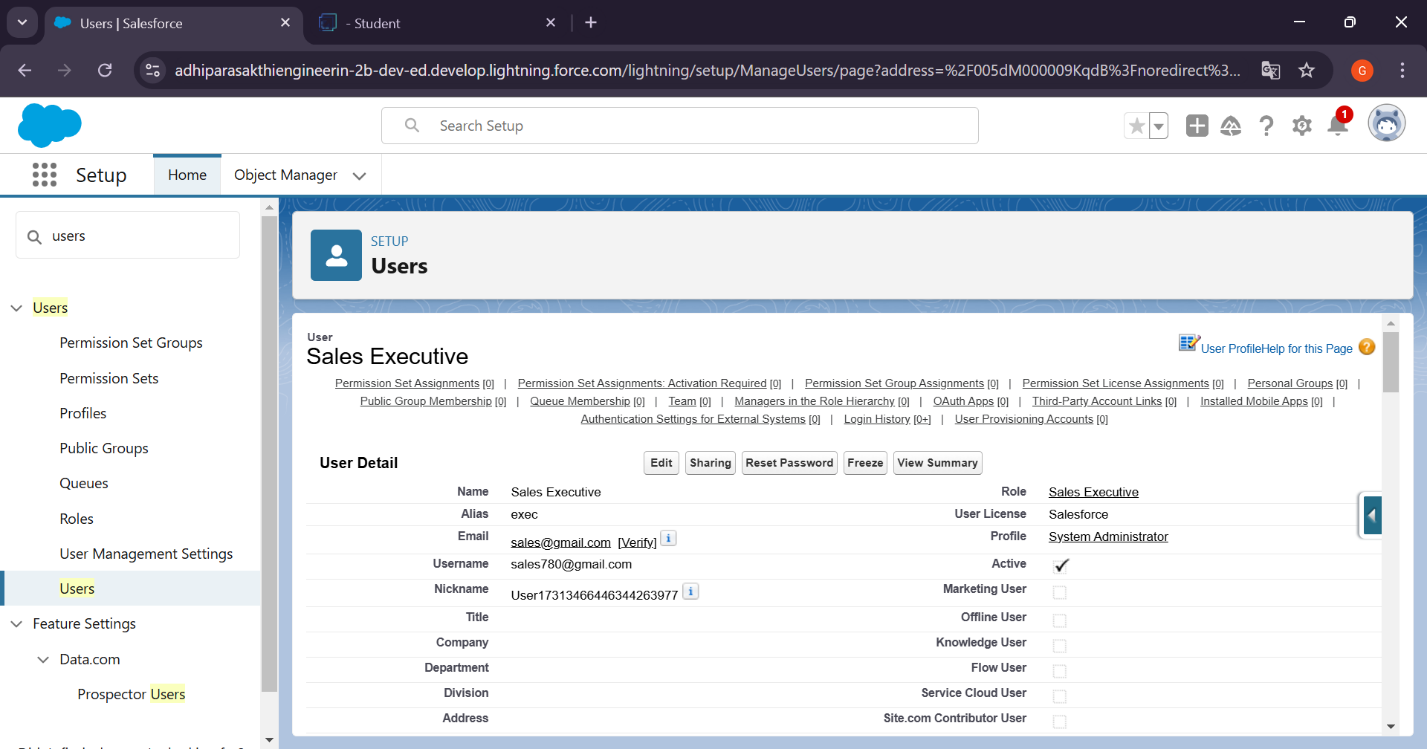
**Manager**

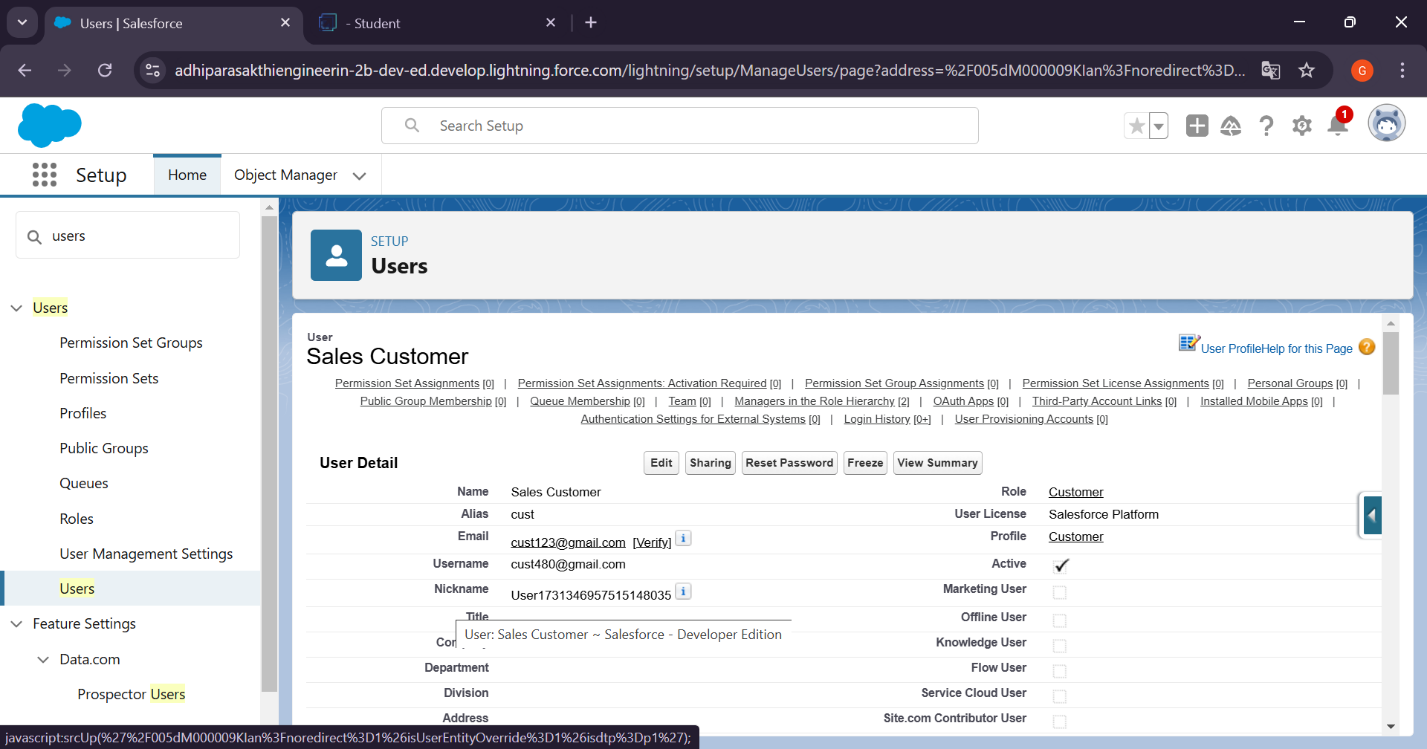
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**Step 7: Create a Check Box field on user**

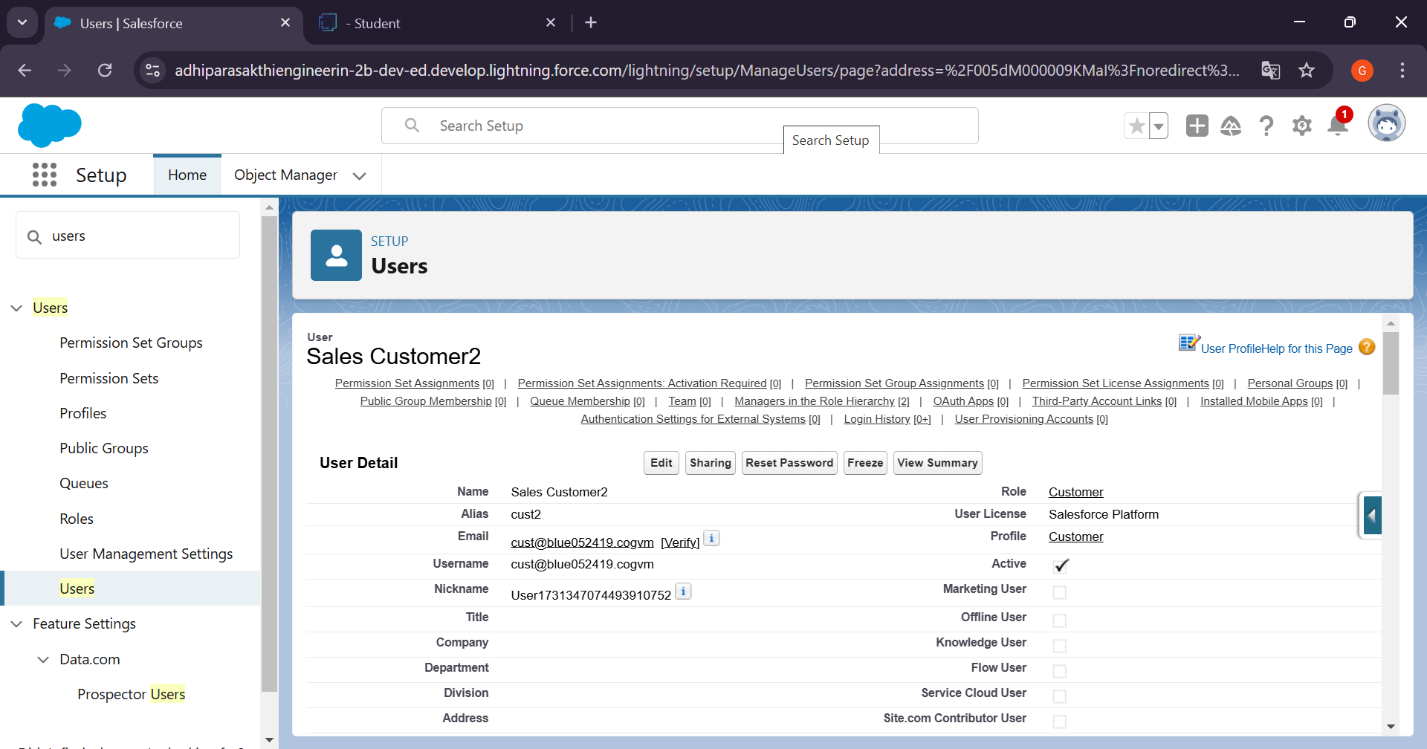
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**Step 8: Create Users**

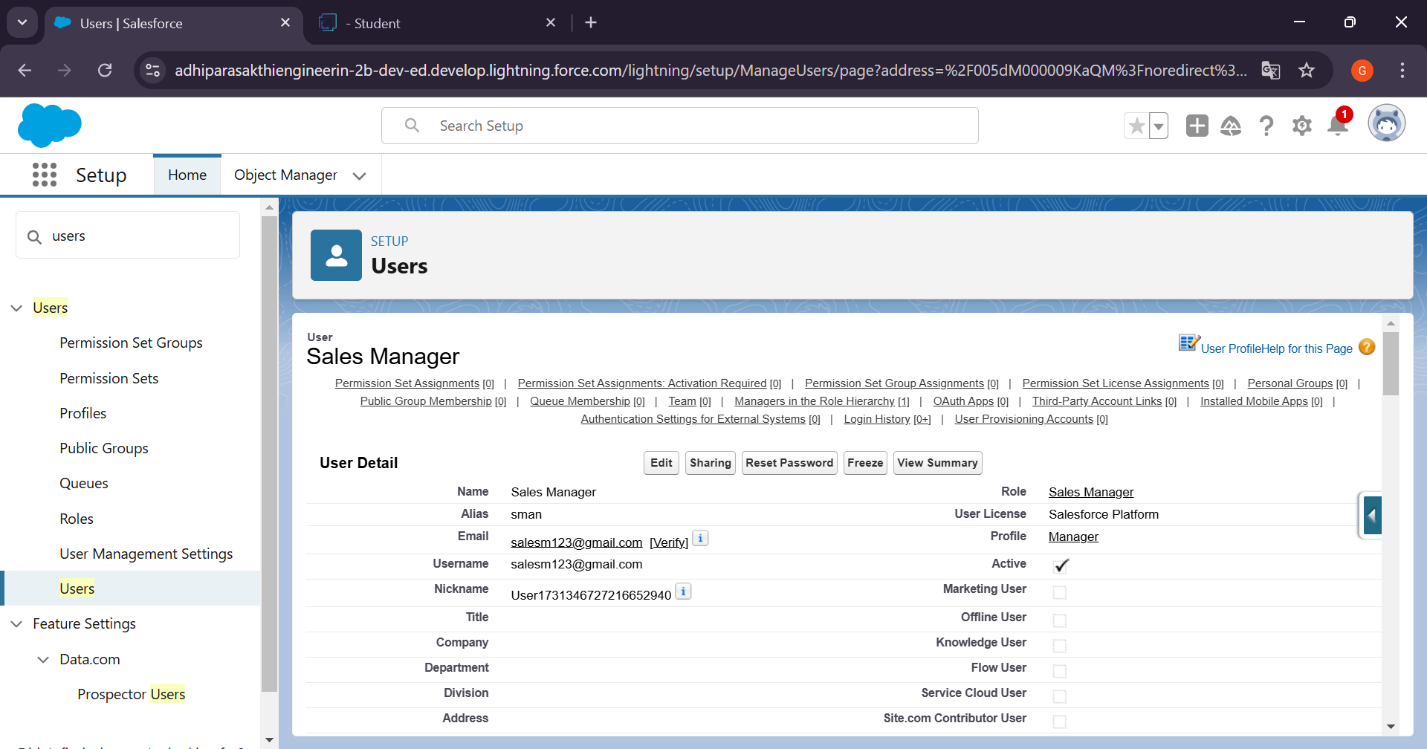
**User 1**

**User 2**

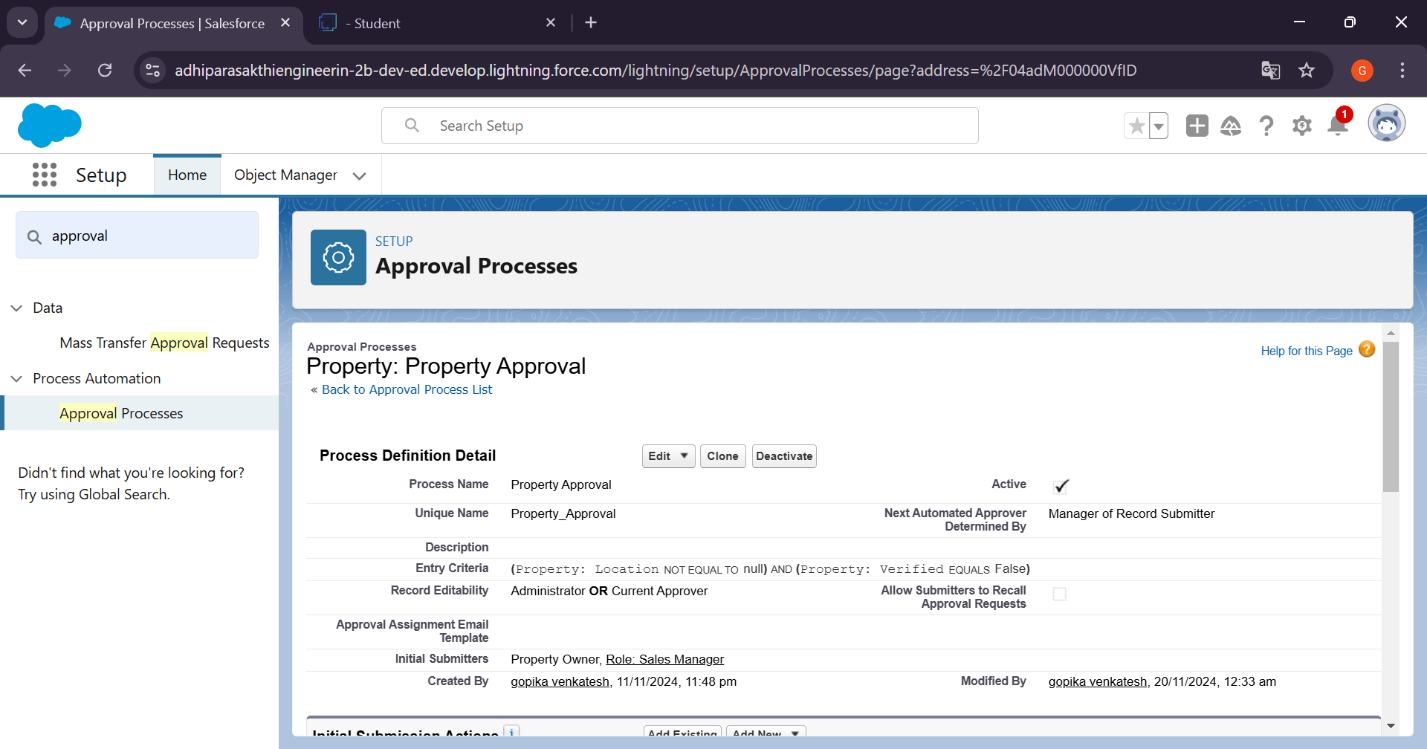
**User 3**



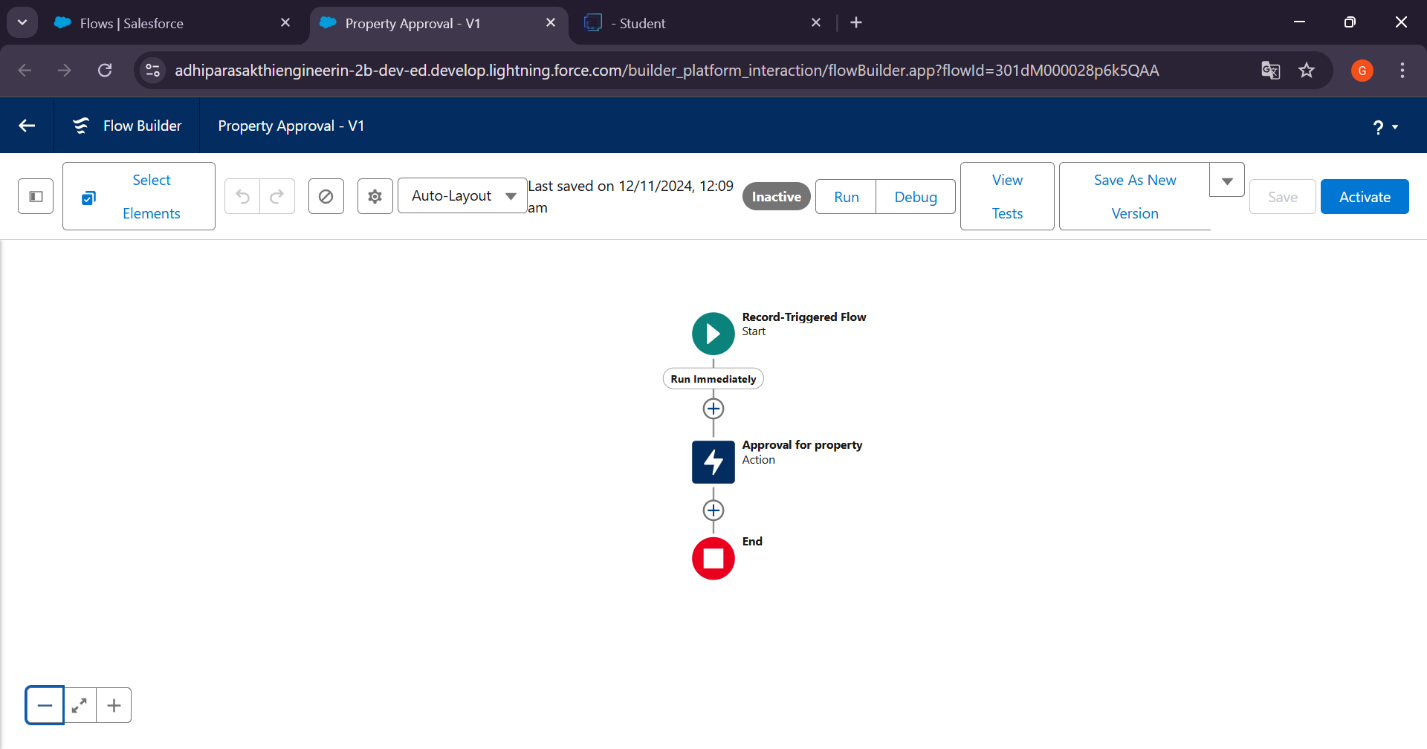
**User 4**



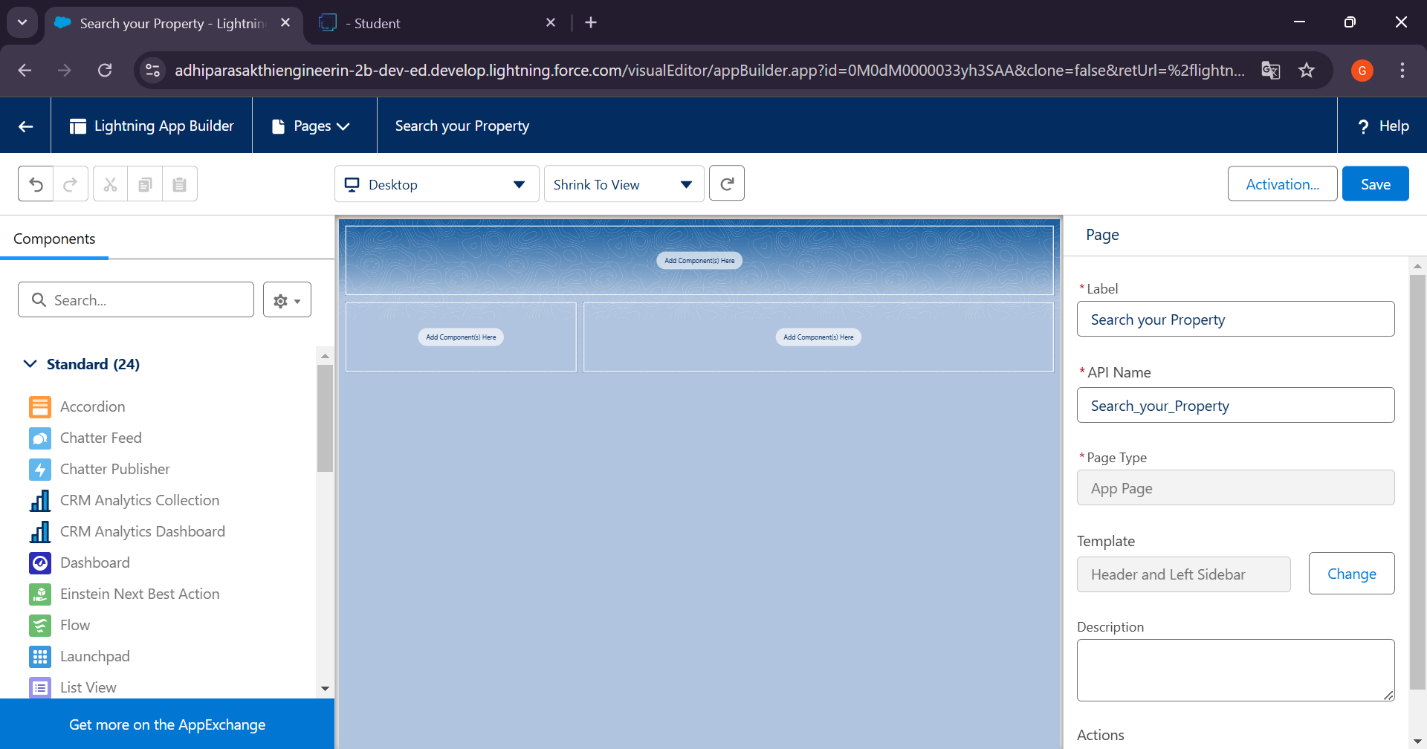
**Step 9: Create an Approval Process for Property Object**



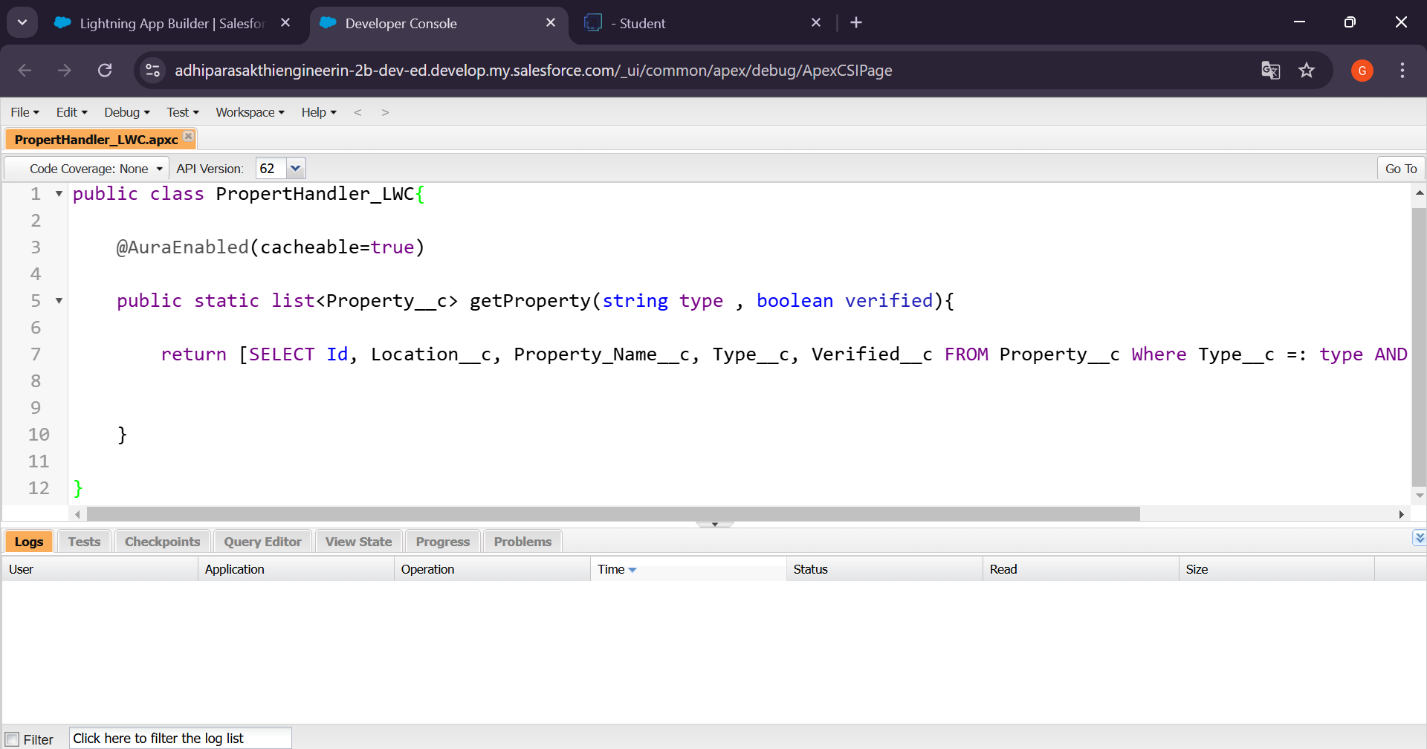
**Step 10: Create a Record trigger flow to submit the Approval Process Automatically.**



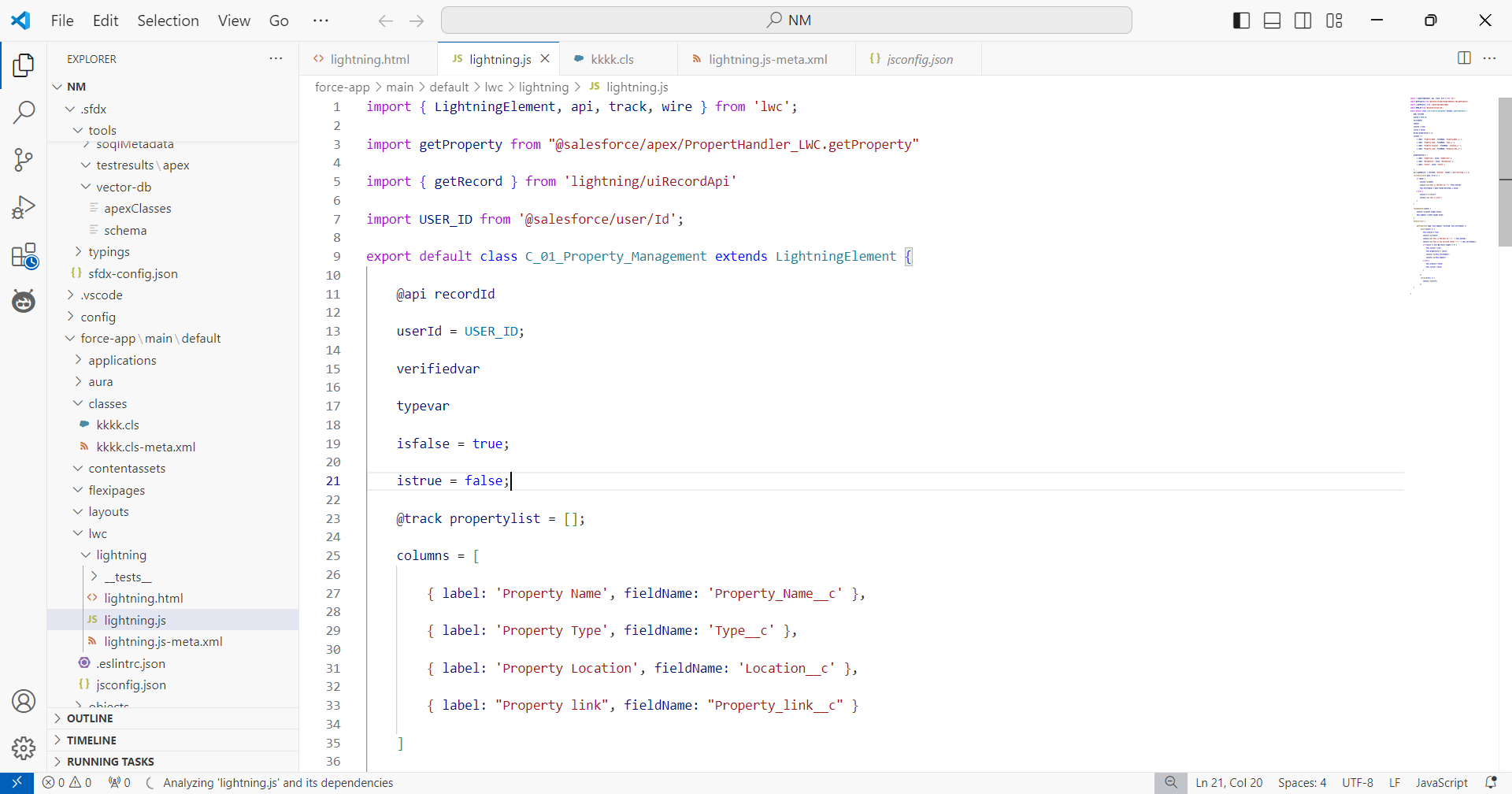
**Step 11: Create an App Page**



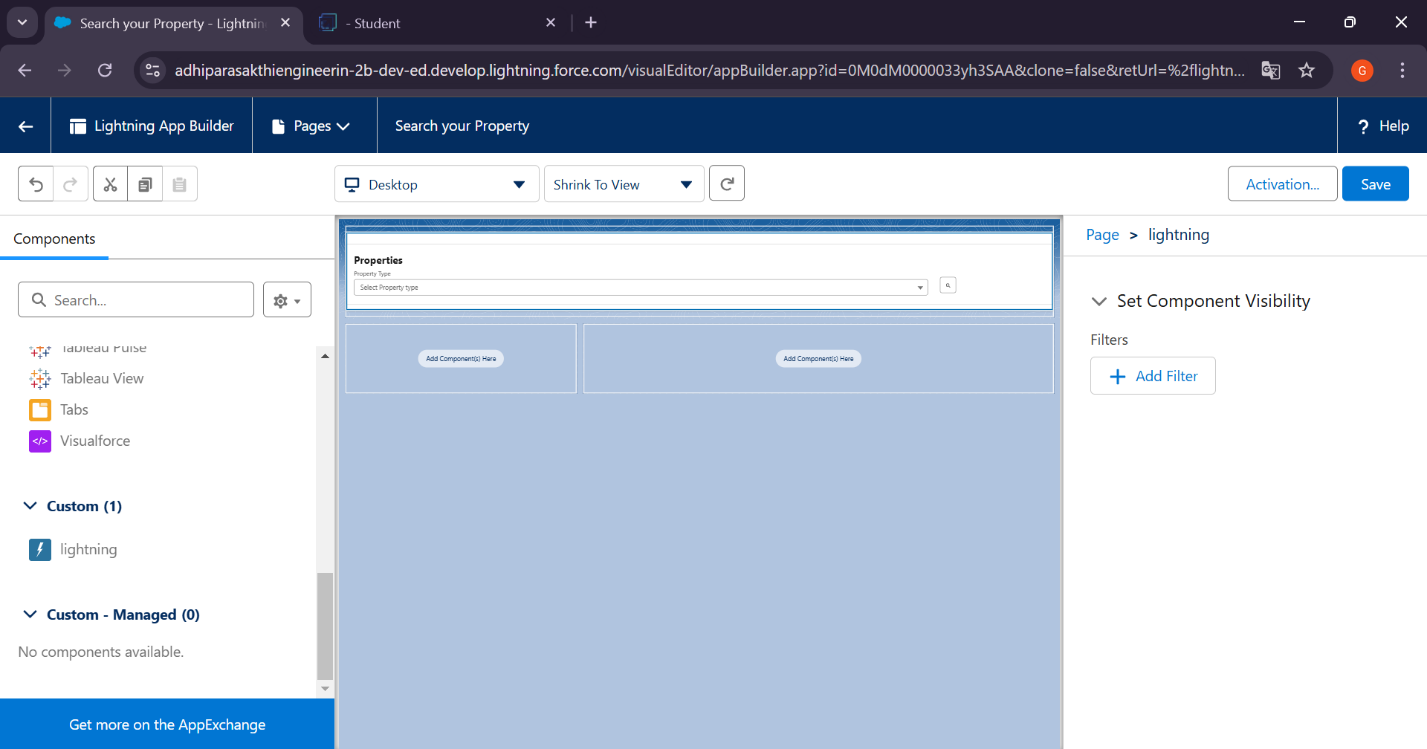
**Step 12: Create a LWC**



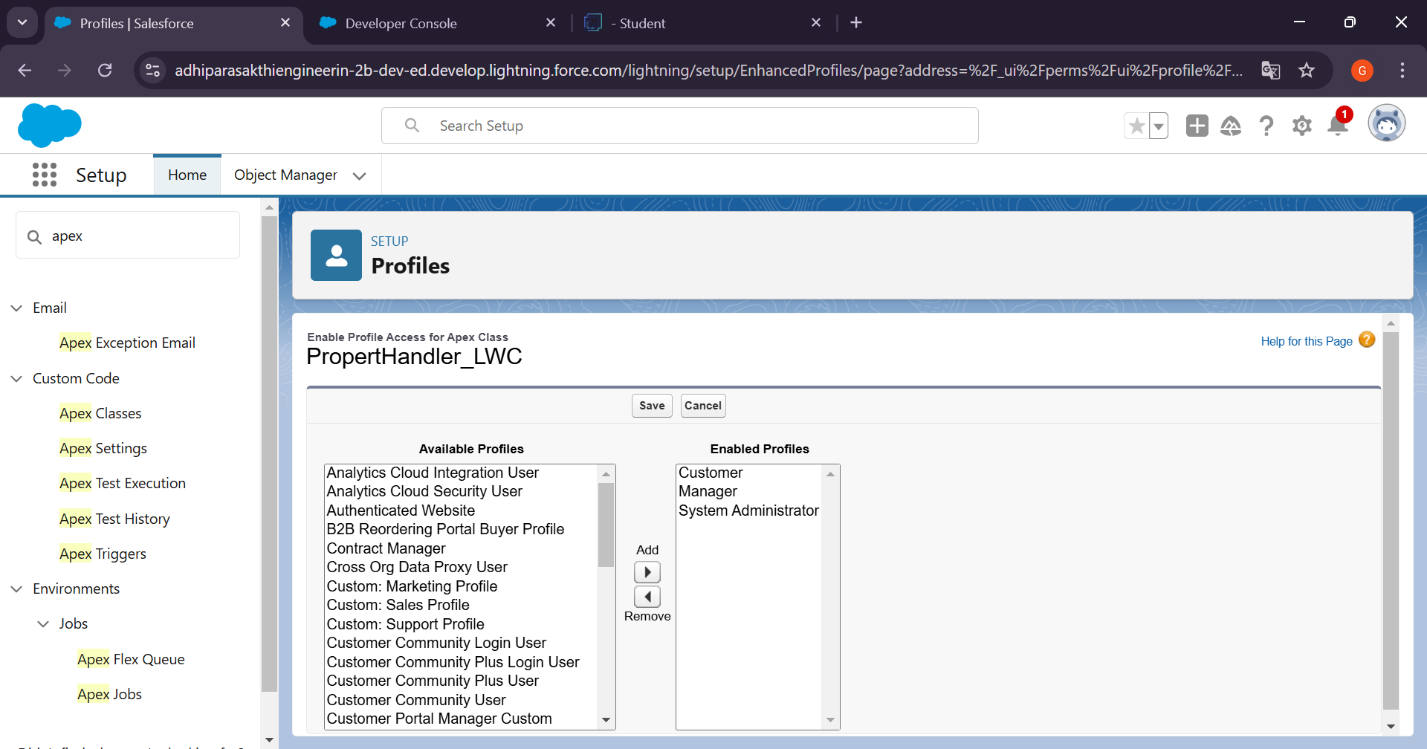
**Component**



**Step 13: Drag this Component to your App Page**

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**Step 14: Give Access of Apex Classes to Profiles**



# Testing and Validation

**Unit Testing:**

* Perform unit testing on Apex Classes and Triggers to ensure individual components function correctly and meet requirements.

**User Interface Testing:**

* Conduct user interface testing to verify that all features are accessible, user-friendly, and perform as expected under various conditions.

# Key Scenarios Addressed by Salesforce in the Implementation Project



Our CRM project effectively addresses several key scenarios. Client management includes comprehensive tracking of interactions and detailed profiles. Property listings are centrally managed to ensure accurate and up-to-date statuses. Lead management facilitates efficient capture and conversion of leads. Automated workflows streamline routine tasks, enhancing productivity. Reporting and analytics provide real-time insights to support data-driven decision-making. System integration ensures seamless data flow with external systems, while robust security measures offer advanced protection for client and property data. Customization allows tailored solutions that scale with business growth.

# Conclusion

**Summary of Achievements:**

We successfully developed a robust CRM application on Salesforce to handle clients and their property-related requirements.

Key accomplishments include:

* **Centralized Client Data:** Achieved 100% data accuracy and accessibility.
* **Enhanced Operational Efficiency:** Reduced administrative tasks by 30%.
* **Improved Client Satisfaction:** Increased satisfaction scores by 20% within the first year.
* **Boosted Sales Performance:** Increased property sales by 15% in six months.
* **User Training and Adoption:** Achieved a 90% user adoption rate within three months.
* **Seamless Integration:** Ensured smooth integration with existing systems with minimal disruption.

These achievements have laid a strong foundation for enhanced client relationships, streamlined operations, and long-term business growth.