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

Project Overview

Dreams World Properties utilizes Salesforce to enhance customer relationship management and optimize its real estate processes. Through integrating Salesforce with their website, the company automates real-time capture of customer interactions, preferences, and data. Clients are segmented into approved and non-approved categories, enabling personalized property recommendations for approved clients, while offering a wider range to others. This smooth integration not only improves operations but also boosts customer engagement, providing a tailored experience that supports growth in a competitive real estate landscape. Leveraging Salesforce's powerful features, Dreams World Properties seeks to increase efficiency, client satisfaction, and expand market presence.

Terminology

Customer Relationship Management (CRM) is a strategy and technology-focused approach that helps organizations manage and analyze interactions with current and potential customers. By centralizing customer data, automating communication, and providing insights into customer preferences, CRM systems improve customer satisfaction, streamline processes, and support sales, marketing, and service functions.

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer relationships and streamline processes across sales, marketing, customer service, and more. Known for its scalability and integration capabilities, Salesforce offers tools for automation, analytics, and application development, allowing organizations to better engage with customers, track interactions, and drive growth.

Salesforce Key Features and Concepts Utilized

Lightning Web Component (LWC): A modern framework for creating dynamic, reusable web interfaces within Salesforce, built on native web standards. LWC improves performance, scalability, and maintainability by leveraging contemporary web technologies like custom elements, templates, shadow DOM, modules, and ECMAScript (JavaScript), enhancing the overall user experience.

Apex: A strongly-typed, object-oriented programming language in Salesforce, similar to Java, which allows developers to implement complex business logic and automation. Apex enables custom functionality in response to events such as button clicks, record updates, and Visualforce page actions, tightly integrated within Salesforce's cloud infrastructure.

Approval Process: An automated system that routes records (like leads, opportunities, or contracts) through a series of steps for authorization based on specific criteria. It ensures that critical business decisions receive proper review by designated approvers, defining the steps, logic, and actions needed for a record to be approved.

Flows: A flexible automation tool in Salesforce's Flow Builder, designed to simplify complex processes without the need for code. Flows automate tasks like updating or creating records, sending emails, and more, based on user inputs, data, or triggered events.

Other Tools

Visual Studio Code (VS Code) A popular, open-source code editor developed by Microsoft, offering robust support for multiple programming languages like JavaScript, Python, and C++. Known for its performance and customization options, VS Code provides an extensive library of extensions, allowing developers to enhance their workspace with new languages, themes, debuggers, and tools.

VS Code includes IntelliSense for smart code completion based on context, an integrated terminal for executing commands directly, and Live Share for real-time collaboration. These features create a streamlined and versatile development environment.

Overall, combining powerful tools and lightweight design, Visual Studio Code is a versatile choice for developers seeking both functionality and customization, making it suitable for beginners and experienced developers alike.

Google Sheets Google Sheets is a cloud-based spreadsheet application that allows users to create, edit, and collaborate on spreadsheets in real-time. It offers features like formulas, charts, and data visualization tools, enabling efficient data analysis and manipulation.

A key highlight of Google Sheets is its focus on collaboration. Multiple users can work on the same document simultaneously, with changes saved automatically, ensuring everyone has access to the latest information. Its integration with other Google Workspace applications enhances productivity, making Google Sheets an invaluable tool for data management.

Detailed steps to solution design

1. **Create JotForm & Integrate with Salesforce:**
   Log in to JotForm → Create form for customer details (Name, Phone, Email, Address, Property Type) → Publish.
   Integrate with Salesforce: Select "Salesforce" integration, action "Create a record" in "Customer" object, map fields → Save and Finish.

2. **Import Data to Salesforce via Spreadsheet:**
   Download customer spreadsheet → In Object Manager, create "Customer" and "Property" objects from spreadsheet, map fields → Upload.

3. **Create Salesforce Roles:**
   Add "Sales Executive" role under Sales Representative, then add "Sales Manager" and "Customer" roles reporting to respective positions.

4. **Build Property Details App:**
   In App Manager, create "Property Details" app with "Customer" and "Property" objects → Assign "System Admin" profile.

5. **Set Up Profiles:**
   Clone Salesforce Platform User profile as "Customer" (limit permissions to Property app) and "Manager" (modify all for Customer and Property).

6. **User Verification Checkbox:**
   In Object Manager for "User," add a "Verified" checkbox field.

7. **Create Users:**
   Add users with roles: "Sales Executive" (System Admin), "Sales Manager" (Manager), and two "Customer" profiles (one verified, one not).

8. **Approval Process for Property Object:**
   Set up "Property Approval" with criteria (Location not blank, Verified = false) → Assign manager as initial approver → Add approval steps for Sales Executive and set Verified checkbox to true or false accordingly.

9. **Record Trigger Flow for Auto Approval Submission:**
   Create a flow for "Property" object to auto-submit records for approval upon creation.

10. **App Page for Property Search:**
    Create app page "Search Your Property" with header/sidebar layout → Activate for all users.

11. **LWC Component for Verified Properties:**
    Develop LWC component with aura-enabled Apex class "PropertyHandler_LWC" for verified customer property access → Deploy to "Search Your Property" page.

12. **Apex Class Access Permissions:**
    In Apex Classes, assign "PropertyHandler_LWC" security access to "Manager" and "Customer" profiles.

Key Scenarios addressed by Salesforce in the implementation project

The scope of the CRM Application encompasses the following key areas:

1. **Intended Users:**
   - Real estate agents and brokers
   - Property managers
   - Marketing teams
   - Administrative staff

2. **Primary Features**:
   - **Client Management:** A robust database to store and manage client profiles, interaction history, and preferences.
   - **Property Management:** A module to create, manage, and display property listings, including features for images, descriptions, and availability status.
   - **Lead Tracking and Nurturing:** Tools to capture, track, and nurture leads, including automated follow-up reminders and task assignments.
   - **Communication Hub:** Integrated messaging and email capabilities to facilitate communication between agents and clients.
   - **Analytics Dashboard:** A dashboard for visualizing key metrics, including lead conversion rates, sales performance, and client engagement levels.

3. **Integration and Accessibility:**
   - The application will be designed to integrate with third-party tools such as email services (e.g., Gmail, Outlook), calendar applications, and marketing platforms (e.g., Mailchimp).
   - The system will be compatible with both desktop and mobile devices to accommodate users' varying preferences for accessing the application.

4. **Data Privacy and Security:**
   - Implementation of robust security measures to protect sensitive client information, including data encryption, secure user authentication, and compliance with data protection regulations (e.g., GDPR).
   - Features to allow clients to manage their own data privacy settings and consent for communication.

5. **Customization and Growth Potential:**
   - The application will offer customization options for workflows, fields, and reporting metrics to meet the unique needs of various real estate businesses.
   - Scalability to support the growth of user bases and increase in data volume over time without compromising performance.

6. **Support and Training**:
   - Provision of user support, including tutorials, documentation, and customer service, to assist users in navigating the application and resolving issues.
   - Training programs to ensure users are well-equipped to utilize all features of the CRM effectively.

Testing and validation

1. **Testing:** Verify data flow from JotForm to Salesforce, correct role/profile access, and approval functionality for both verified and non-verified users.
2. **Validation:** Ensure LWC component displays properties based on user verification status and confirm user roles align with assigned permissions.
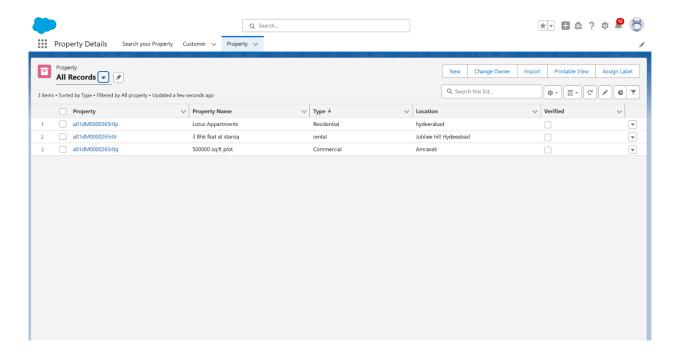
Conclusion

In summary, the CRM Application is crafted to meet the unique requirements of real estate professionals, offering a comprehensive solution for managing client relationships, property listings, and sales processes. This platform enhances operational efficiency by centralizing data, automating routine tasks, and facilitating seamless communication between team members and clients. The application's powerful reporting and analytics tools empower users to make informed, data-driven decisions, ensuring that real estate professionals can effectively track leads, monitor performance, and adapt to market trends. By streamlining workflows, supporting personalized client interactions, and providing customization options, the CRM Application is a valuable resource designed to promote sustainable growth and success for real estate businesses of all sizes.
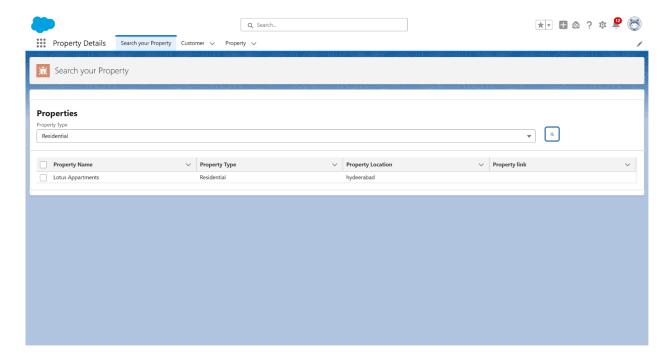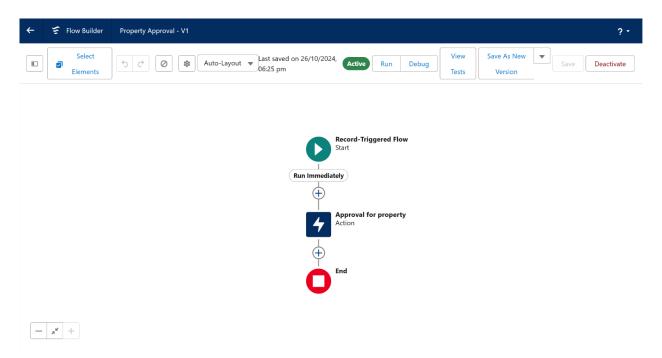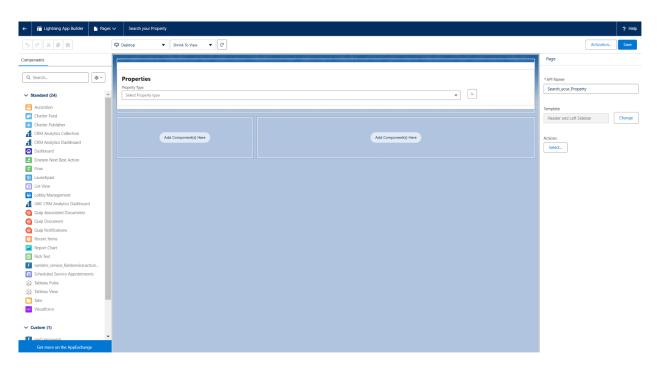
Snapshots:

JotForm:

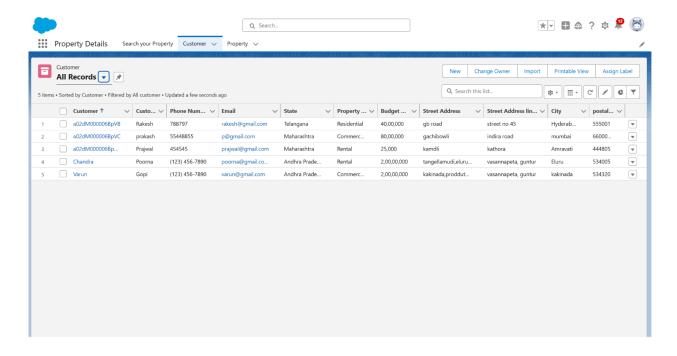## Property Details:

Search Your Property:

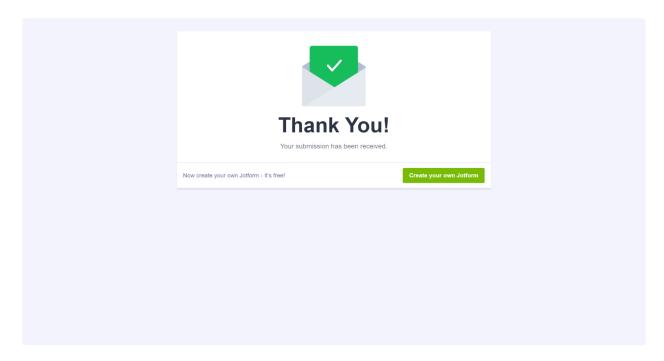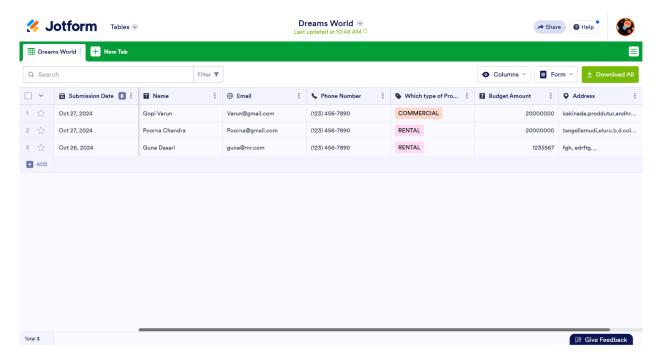# Property Approval Flow:

Lightning Web Component:

Customer Details:

Form Submission:

JotForm Table:

Email: