
SALESFORCE VIRTUAL INTERNSHIP

A CRM Application To Handle The Clients And Their Property Related Requirements

SmartInternz



Introduction

Dreams World Properties has integrated Salesforce to enhance customer interactions. An automated system captures visitor details and preferences from their website, creating records in Salesforce. Customers are categorized as approved or non-approved. Approved customers receive personalized property recommendations, while non-approved customers see a broader range of listings. This integration improves user experience and operational efficiency by automating record creation and customer categorization. As a result, customer engagement increases, supporting the company's growth in the real estate market. This integration showcases how technology can drive business success through improved customer relationship management and streamlined operations.

Milestone 1: - Create A JotForm and Integrate It with The Org to Create a Record of Customers Automatically

To create a form using JotForm that allows customers to input their details directly into Salesforce and enables admins to create a user in the organization, follow these steps:

Step 1: Create the Form in JotForm

1. **Sign up or log in to JotForm:**
Go to JotForm and sign in to your account.
2. **Create a new form:** Click on the "Create Form" button and choose a blank form or a template that suits your needs.
3. **Add fields to the form:** Add the necessary fields to collect customer information, such as Name, Email, Type of Property, Budget Amount, Address and Phone Number.
4. Once the form is created, publish it by clicking on publish.
5. The JotForm created link:

<https://form.jotform.com/241740916216050>

The screenshot shows a JotForm interface with the title 'Dreams World' at the top. Below the title is a logo consisting of a stylized 'D' inside a circle with the text 'Dreams World' underneath. The form contains the following fields:

- Name ***: Two adjacent input fields for First Name and Last Name.
- Email**: An input field with the placeholder 'example@example.com'.
- Type of Property**: Three radio button options: Residential, Commercial, and Rental.
- Phone Number**: An input field.
- Budget Amount ***: An input field with the placeholder 'e.g., 23'.
- Address**: Two stacked input fields for Street Address and Street Address Line 2.
- City** and **State / Province**: Two adjacent input fields.
- Postal / Zip Code**: An input field.

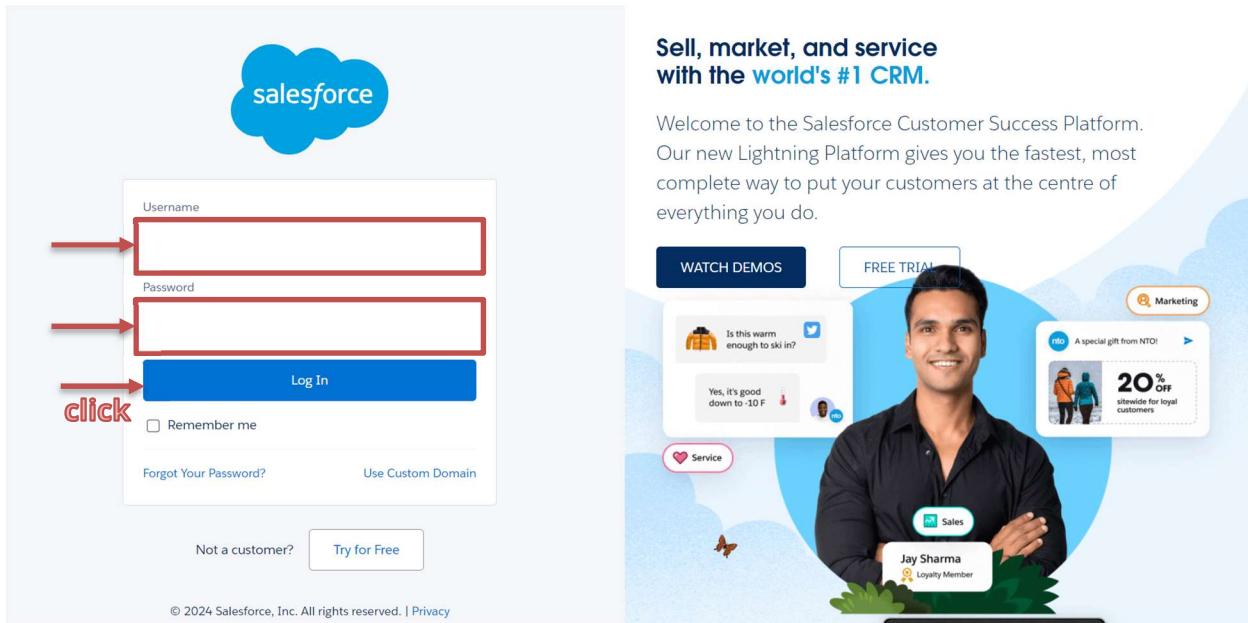
A green 'Submit' button is located at the bottom right of the form area.

Activity 1: Create Objects from Spreadsheet

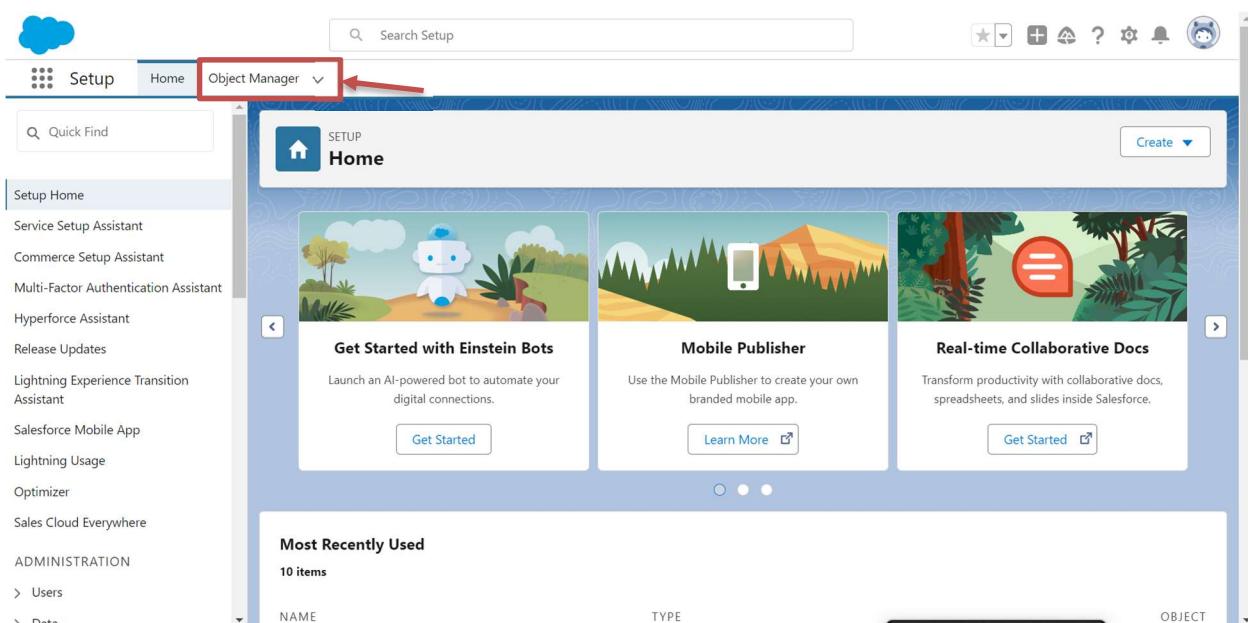
Creating Objects from Spreadsheet in Salesforce

Step 1: Login to the Salesforce account <https://login.salesforce.com/>

Credentials Required: Username and Password



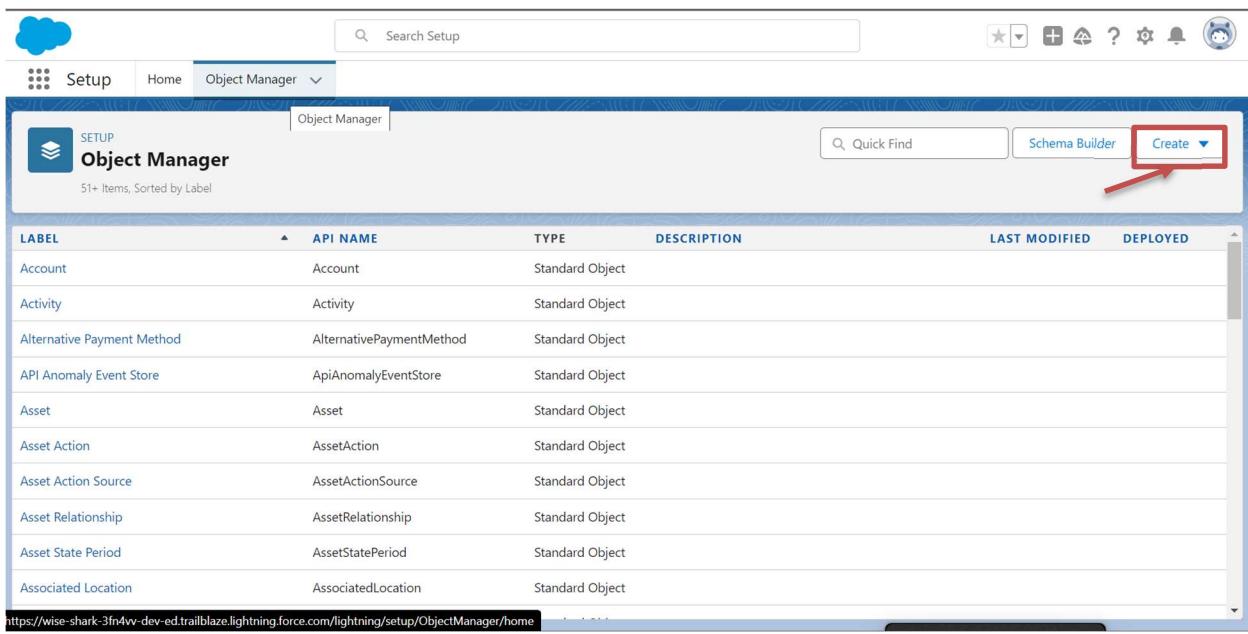
This will redirect you to the salesforce setup page.



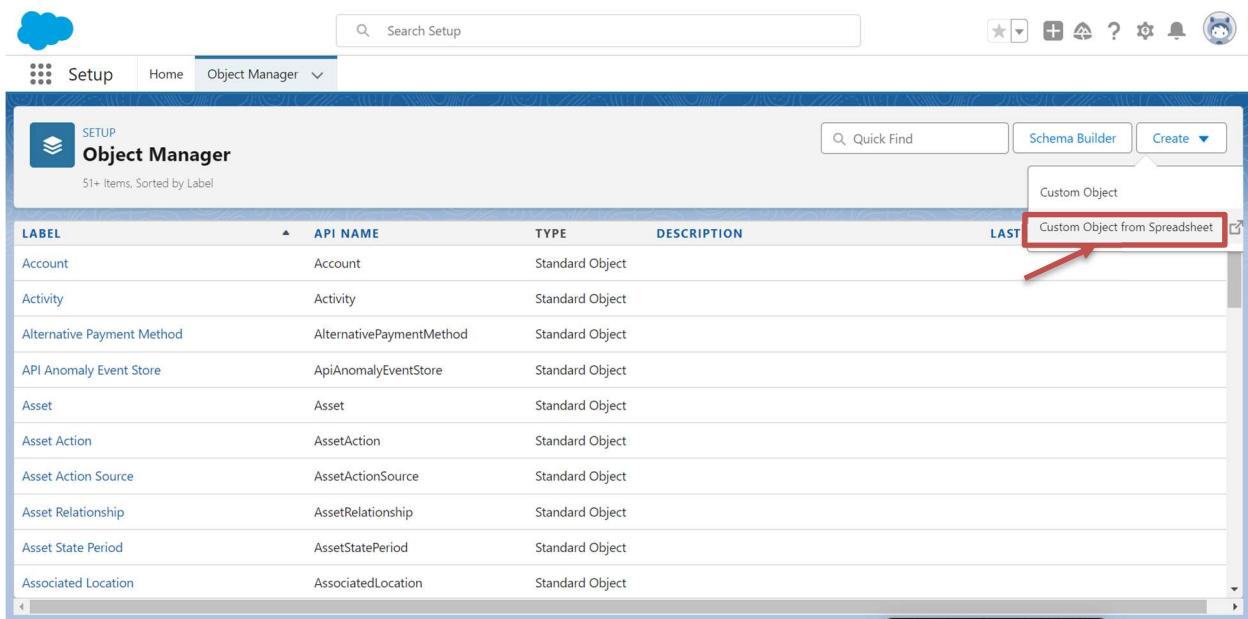
Create Customer Object

For creating the customer object follow the steps:

1. Go to the object manager and click on create object from spreadsheet.



The screenshot shows the Salesforce Object Manager page. At the top right, there is a 'Create' button with a dropdown arrow. A red box highlights this button. Below the header, there is a search bar labeled 'Search Setup' and a toolbar with various icons. The main area displays a table of objects with columns for Label, API Name, Type, Description, Last Modified, and Deployed. The table includes rows for Account, Activity, Alternative Payment Method, API Anomaly Event Store, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, and Associated Location. The URL in the browser address bar is <https://wise-shark-3fn4vv-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/home>.



The screenshot shows the same Salesforce Object Manager page as the previous one, but with a different focus. A red box highlights a link labeled 'Custom Object from Spreadsheet' located in the top right corner of the page. The rest of the interface and data table are visible but not the primary focus.

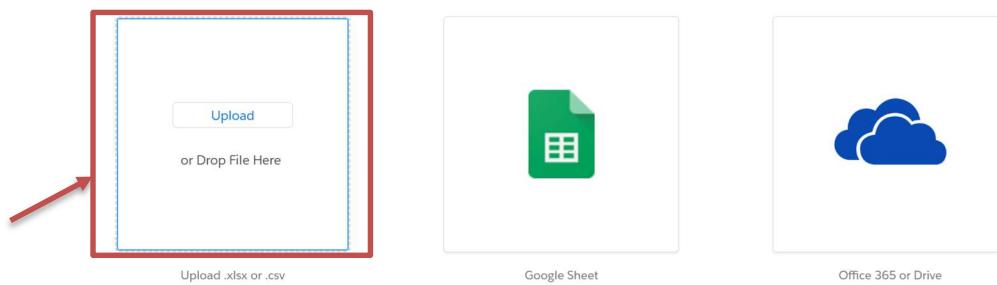
Create a custom object from a spreadsheet



Create a custom object from a spreadsheet

Select a spreadsheet

Select a source for your new object data.



2. Download the customer spreadsheet provided [Customer](#)

A screenshot of a Google Sheets document titled "Customer". A context menu is open at cell A1, with the "Download" option highlighted by a red box. The menu also includes options like "New", "Open", "Import", "Make a copy", "Share", "Email", and "Details". The main spreadsheet area shows data for properties across columns D through L.

3. After downloading, upload the file and map the fields and upload to create an object.

Screenshot of the "Create a custom object from a spreadsheet" interface. The top section is titled "Define object and fields" with instructions to choose a data source, map fields, and import field data. The "CSV File Details" section includes settings for encoding (Unicode (UTF8)), separator (Comma), field label source (Enter manually), field label row (1), and import rows (Yes, import data). The "Fields 11 of 11 to import" table maps four fields: Customer, Phone Number, Email, and State, each with its corresponding Salesforce field name and type. A "Next" button at the bottom right is highlighted by a red box.

Create a custom object from a spreadsheet

Object properties

Almost finished! Time to define your object's attributes.

* Label
Customer - Sheet1

Plural Label
Customer - Sheet1

* API Name ⓘ
Customer_Sheet1

Object Description

> Advanced Settings

Back Finish

Create a custom object from a spreadsheet

Nice Work!



Now you can add your object to a Lightning app. You might need to refresh the object list to see it.

Import Overview

Object Created
Customer - Sheet1

Fields Detected
11 Fields Created
11

Rows Detected
3 Rows Imported
3

[Import Another Object](#)

Create Property Object

1. Follow the same from creating the Property Object with the [Property](#) spreadsheet.

Create a custom object from a spreadsheet

Select a spreadsheet

Select a source for your new object data.

Upload .xlsx or .csv

Google Sheet

Office 365 or Drive

Property File Edit View Insert Format Data Tools Extensions Help

A1

Ctrl+O

Download Microsoft Excel (.xlsx)

OpenDocument (.ods)

PDF (.pdf)

Web page (.html)

Comma-separated values (.csv)

Tab-separated values (.tsv)

Sheet1

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

CSV File Details

Encoding Format <small>i</small>	Values Separated By	Field Label Source	* Field Labels Row	Import 3 rows of Data? <small>i</small>	Record Name Field <small>i</small>
Unicode (UTF8)	Comma	<input type="radio"/> Enter manually <input checked="" type="radio"/> Detect from row	1	<input type="radio"/> No, skip import <input checked="" type="radio"/> Yes, import data	Let Salesforce Create a D...

Fields 4 of 4 to import Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS <small>i</small>	FIELD PREVIEW
✓ Property Name	Property Name	Text	<input checked="" type="checkbox"/>	Lotus Apartments
✓ Type	Type	Text	<input checked="" type="checkbox"/>	Residential
✓ Location	Location	Text	<input checked="" type="checkbox"/>	hydeerabad
✓ Verified	Verified	Text	<input checked="" type="checkbox"/>	checked

Next 

Create a custom object from a spreadsheet

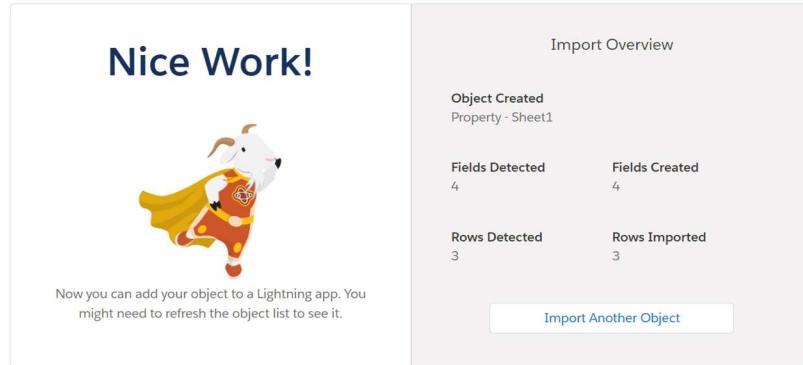
Object properties

Almost finished! Time to define your object's attributes.

* Label	Property - Sheet1
Plural Label	Property - Sheet1
* API Name <small>i</small>	Property_Sheet1
Object Description	
» Advanced Settings	

Finish 

Create a custom object from a spreadsheet



Activity 2: Integrate JotForm with Salesforce Platform

In this Activity we are going to integrate JotForm with Salesforce.

1. On the JotForm Platform, Click on Integration and choose Salesforce.

The screenshot shows the JotForm platform interface for a form titled "Dreams World". The left sidebar has a red box around the "INTEGRATIONS" section, which is highlighted by a red arrow. The main area shows "FORM SETTINGS" with the title set to "Dreams World". The "Form Status" section is set to "ENABLED".

The screenshot shows the Jotform interface with the 'SETTINGS' tab selected. On the left sidebar, there are several options: CONDITIONS, THANK YOU PAGE (checked), INTEGRATIONS (highlighted with a red box), APPROVAL FLOWS, JOTFORM SIGN, and MOBILE NOTIFICATIONS. The main area is titled 'INTEGRATIONS' and shows a list of available integrations. The 'Salesforce' integration is highlighted with a red box. Other visible integrations include Square, Google Sheets, Google Drive, and Twilio.

2. Click on User Integration and choose “Add to Form”.
3. Select the Org with which you want to Integrate your JotForm with.
4. Select an Action.
5. Select a Salesforce Object: - Customer
6. Map Each and every field on the Object with the fields on the form and “Save Action”.

The screenshot shows the Jotform Form Builder interface for a form titled "Dreams World". The "SETTINGS" tab is selected. On the left sidebar, under the "INTEGRATIONS" section, there is a "SALESFORCE" integration setup. The "Object Fields" mapping section shows how fields from the "Dreams World" object are mapped to Jotform form fields. The "Name" field is mapped to "Name", "Email" to "Email", "Property Type" to "Type of Property", "Street Address" to "Address - Street Address", "Street Address line 2" to "Address - Street Address 2", "City" to "Address - City", "State" to "Address - State", "postal code" to "Address - Postal/Zip Code", and "Budget Amount" to "Budget Amount". The "Email" and "Name" fields are highlighted with red boxes.

7. Then “Save the Integration” and “Finish”.

The screenshot shows the Jotform Form Builder interface for the "Dreams World" form. The "SETTINGS" tab is selected. Under the "INTEGRATIONS" section, there is a "SALESFORCE" integration setup. A modal window is open for "Find existing record Customer". It contains a "CANCEL" button and a "SAVE INTEGRATION" button, which is highlighted with a red box and has a red arrow pointing to it. The "SALESFORCE" integration details are visible above the modal, including the description "Send new leads, contacts, or accounts to your sales CRM".



Integration ready!

You have successfully created your integration.

FINISH

Activity 3: Create Roles

Creating roles as per the business requirement.

1. Go to Setup and Click on Roles, then click on Expand all and Add a Role just below the Sales Representative

Object Manager

51+ Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			
Associated Location	AssociatedLocation	Standard Object			

Home

Search Setup

roles

- Users
 - Roles **Selected**
- Feature Setting
- Sales
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service
 - Case Teams
 - Case Team Roles **Selected**
 - Contact Roles on Cases

Get Started with Einstein Bots

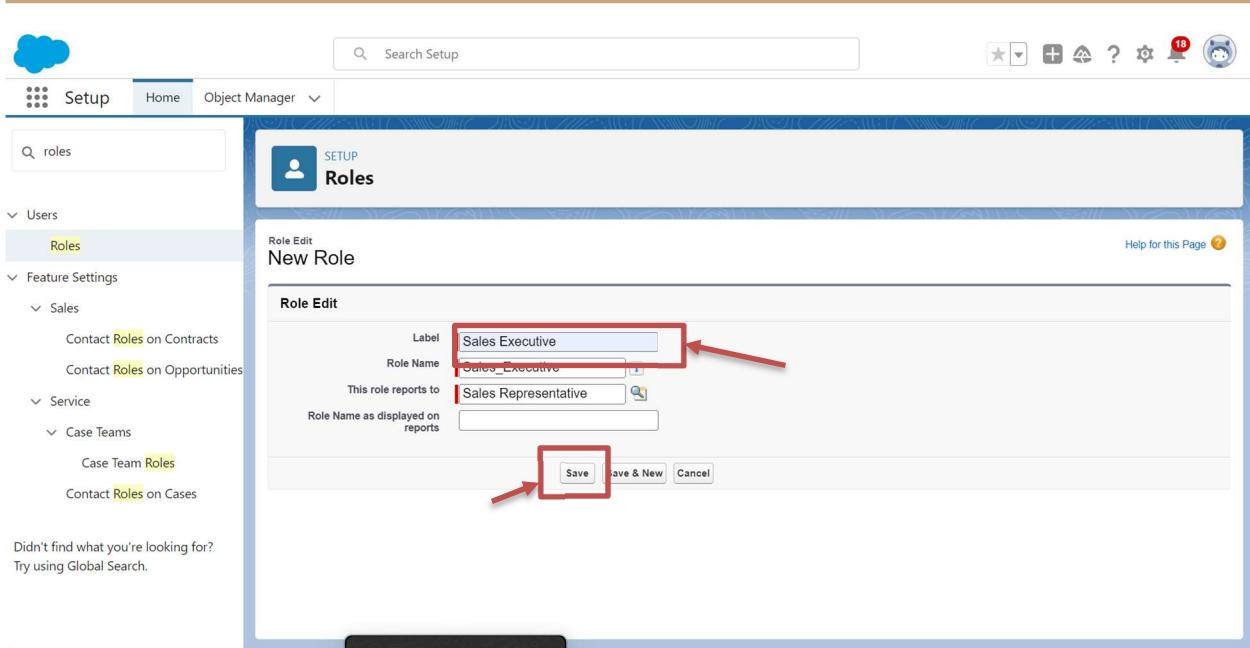
Mobile Publisher

Real-time Collaborative Docs

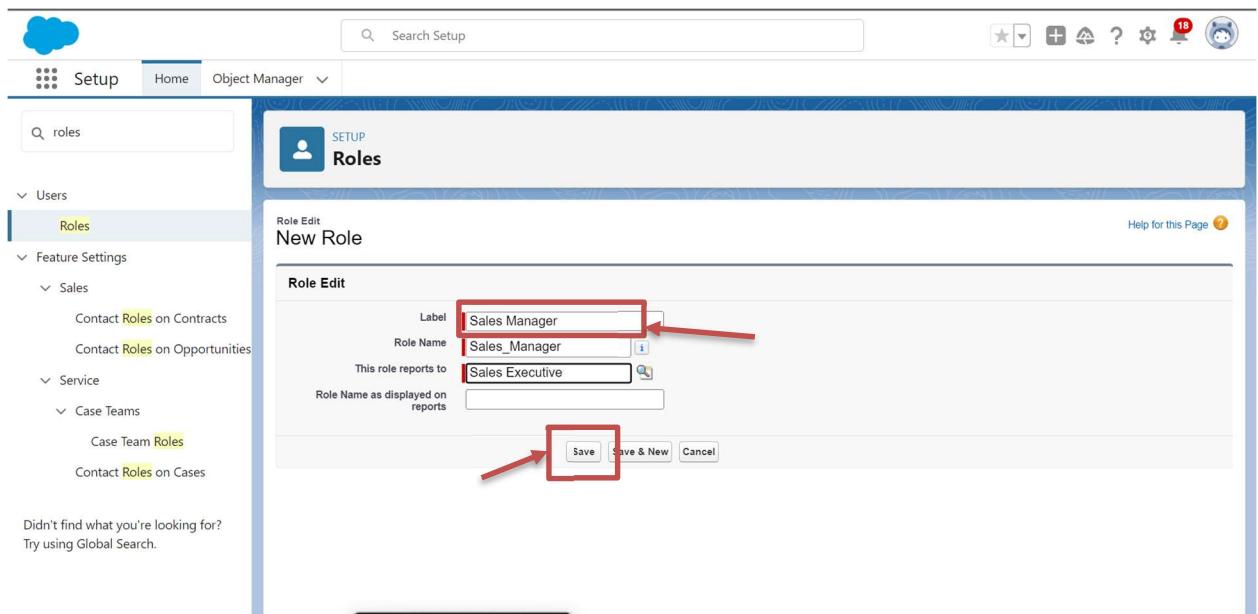
Most Recently Used

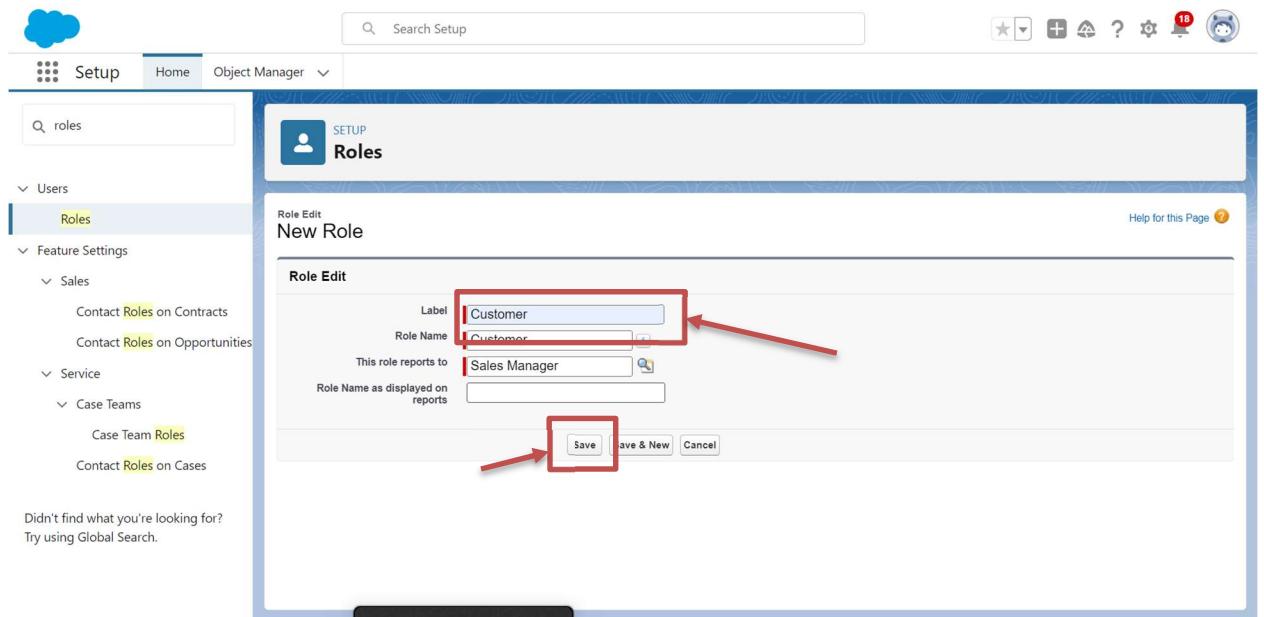
2. Label - Sales Executive

Reports to - Sales Representative



3. Similarly Create a Role Name “Sales Manager” below Sales Executive which reports to Sales Executive, Also Add a Role below Sales Manager labeled as “Customer” which reports to Sales Manager.

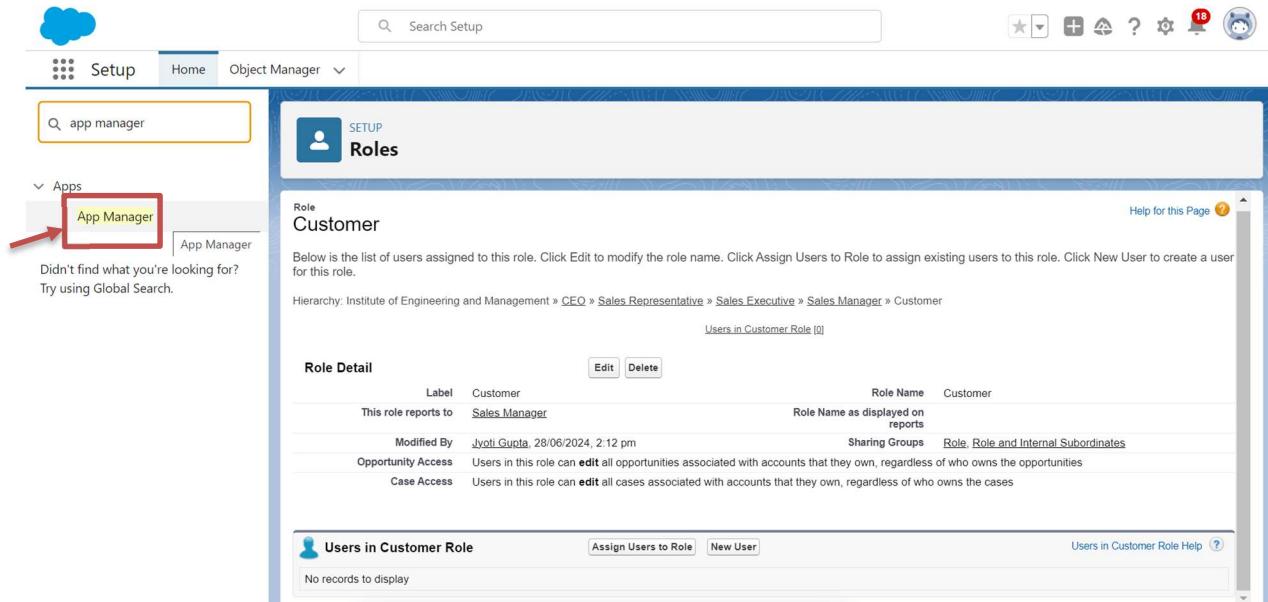




Activity 4: Create A Property Details App

Creating an app where the objects will be displayed.

1. From Setup, Go to App Manager and click on New Lightning App and Name it as "Property Details" and add "Customer" and "Property" Object.



The screenshot shows the 'Lightning Experience App Manager' page. At the top, there's a search bar labeled 'Search Setup' and various navigation icons. Below the header, there's a sidebar with a 'Setup' icon, 'Home', 'Object Manager', and a search bar for 'app manager'. Under 'Apps', the 'App Manager' tab is selected. A message says ' Didn't find what you're looking for? Try using Global Search.' The main area displays a table of 28 items, sorted by App Name, with columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The last item in the list is 'Workbench'. At the bottom of the table, the URL 'https://mindful-koala-lv3bsr-dev-ed.trailblaze.lightning.force.com' is visible.

This screenshot shows the 'New Lightning App' configuration page. It has two main sections: 'App Details' and 'App Branding'. In the 'App Details' section, the 'App Name' field is filled with 'Property Details' and has a red box around it. The 'Developer Name' field is also present. In the 'App Branding' section, there's an 'Image' field containing a circular logo for 'Dreams World Properties'. To the right of the image, there's a 'Primary Color Hex' input field set to '#050505'. Below the branding section, there's an 'Org Theme Options' checkbox. At the bottom right of the page, there's a large blue 'Next' button with a red box around it.

New Lightning App

App Options

Navigation and Form Factor i

* Navigation Style

- Standard navigation
 Console navigation

* Supported Form Factors

- Desktop and phone
 Desktop
 Phone

Setup and Personalization i

Setup Experience

- Setup (full set of Setup options)
 Service Setup

App Personalization Settings

- Disable end user personalization of nav items in this app
 Disable temporary tabs for items outside of this app
 Use Omni-Channel sidebar

Back



Next

New Lightning App

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item

Utility Bar Alignment i

Default

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

Back



Next

New Lightning App

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



grope

Property - Sheet1

Selected Items



Customer - Sheet1



Back



Next

2. Click Next and Next then add "System Admin" Profile and Save.

New Lightning App

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 Selected Items

Customer - Sheet1
Property - Sheet1

Back Next

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles Selected Profiles

System Administrator

Back Save & Finish

Activity 5: Create Profiles

Customer

1. From Setup, Go to Profiles and Clone Salesforce Platform User and Name it "Customer".

The screenshot shows the Salesforce Setup Home page. At the top left, there's a search bar with the placeholder "Search Setup". Below it, a sidebar has a "Profiles" link under the "Users" section, which is highlighted with a red box and a red arrow pointing to it. The main content area features a "Home" card with three sections: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these cards is a "Most Recently Used" section with 10 items. The bottom right corner of the page has a "Create" button.

New Profile		A B C D E F G H I J	
<input type="checkbox"/>	Action	Profile Name	User License
<input type="checkbox"/>	Edit Clone	Silver Partner User	Silver Partner
<input type="checkbox"/>	Edit Clone	Solution Manager	Salesforce
<input type="checkbox"/>	Edit Clone	Standard Platform User	Salesforce Platform
<input type="checkbox"/>	Edit Clone	Standard User	Salesforce
<input type="checkbox"/>	Edit Clone	System Administrator	Salesforce

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	<input type="text" value="Customer"/>

Save **Cancel**

2. Uncheck all the Custom Objects and Check only Property Details from Custom App Settings.

3. Also Remove all the Standard Object Permissions.

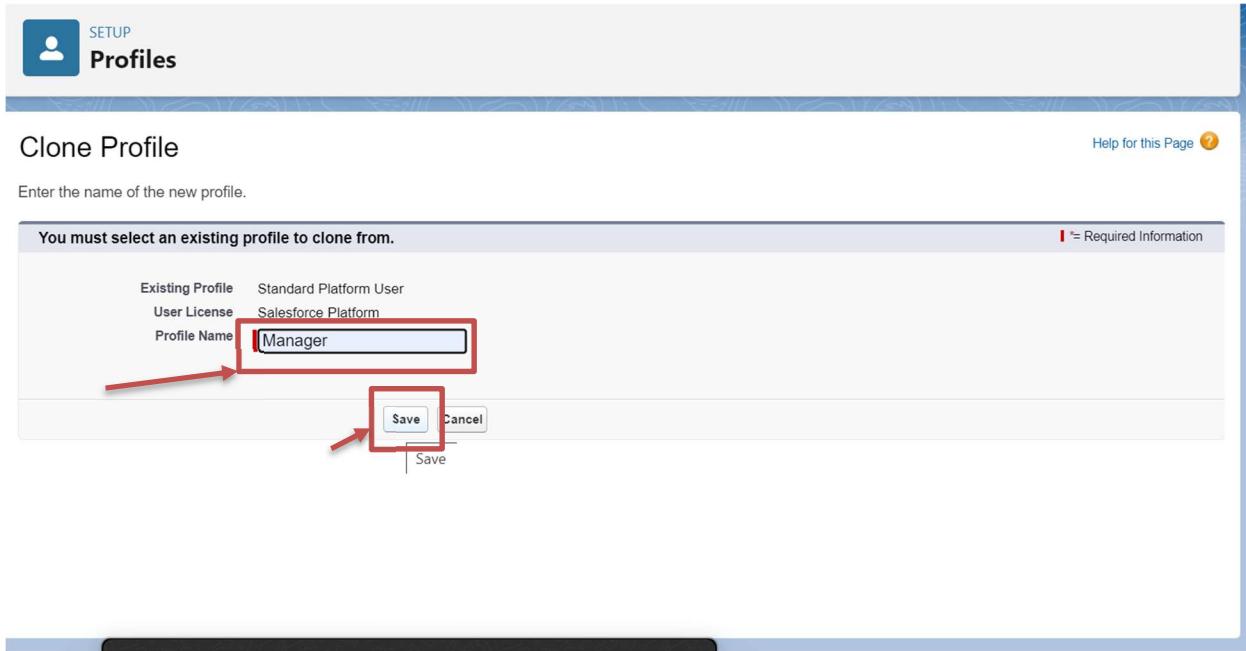
	Basic Access						Data Administration		
	Read	Create	Edit	Delete	View All	Modify All	View All	Modify All	
Accounts	<input type="checkbox"/>								
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
Authorization Forms	<input type="checkbox"/>								
Authorization Form Consents	<input type="checkbox"/>								
Authorization Form Data Uses	<input type="checkbox"/>								
Authorization Form Texts	<input type="checkbox"/>								
Background Operations	<input type="checkbox"/>								
Business Brands	<input type="checkbox"/>								
Communication Subscriptions									
Contact Point Phones	<input type="checkbox"/>								
Contact Point Type Consents	<input type="checkbox"/>								
Customers	<input type="checkbox"/>								
D&B Companies	<input type="checkbox"/>								
Data Use Legal Bases	<input type="checkbox"/>								
Data Use Purposes	<input type="checkbox"/>								
Documents	<input type="checkbox"/>								
Engagement Channel Types	<input type="checkbox"/>								
Ideas									

4. Uncheck all the Custom Object Permissions and check read and view all in "Property"

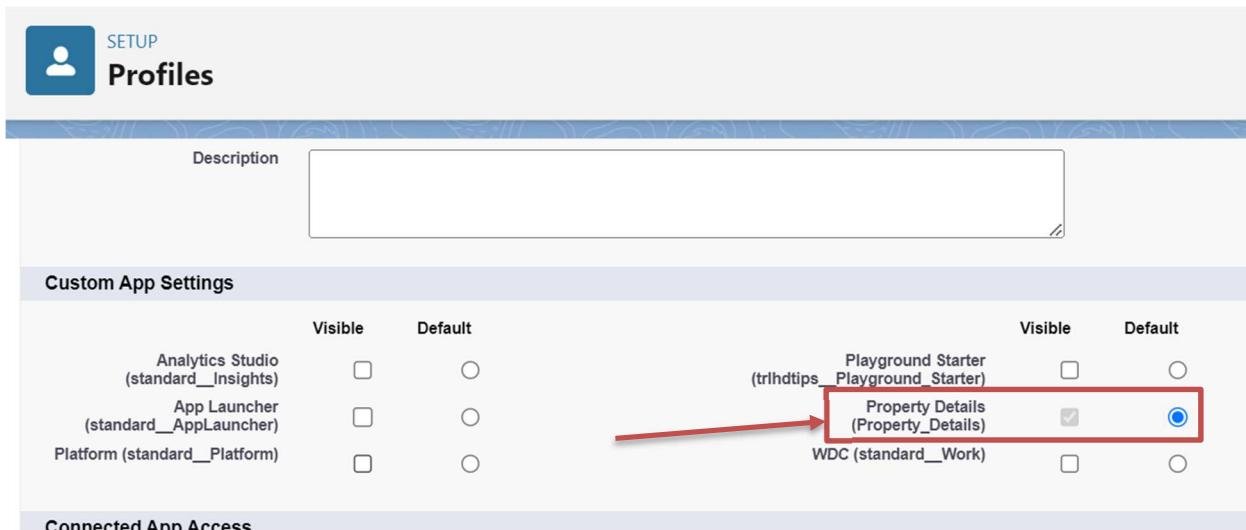
	Basic Access						Data Administration		
	Read	Create	Edit	Delete	View All	Modify All	View All	Modify All	
Customer - Sheet1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Property - Sheet1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					

Manager

1. From Setup, Go to Profiles and Clone Salesforce Platform User and Name it "Manager".



2. Uncheck all the Custom Objects and Check only Property Details from Custom App Settings.



3. Also Remove all the Standard Object Permissions.

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		Basic Access						Data Administration				
	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>	
Accounts	<input type="checkbox"/>	<input type="checkbox"/>							Contact Point Phones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Assets	<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"/>
Authorization Forms	<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"/>				
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>							D&B Companies	<input type="checkbox"/>									
Authorization Form Data Uses	<input type="checkbox"/>	<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"/>				
Authorization Form Texts	<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"/>				
Background Operations	<input type="checkbox"/>												Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Brands	<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"/>				
Communication Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>							Ideas	<input type="checkbox"/>	<input type="checkbox"/>								

- Uncheck all the Custom Object Permissions and check only "modify all" from "Property" and "Customer".

SETUP Profiles

Contact Point Emails	<input type="checkbox"/>	<input type="checkbox"/>	User External Credentials	<input type="checkbox"/>												
Custom Object Permissions																
	Basic Access						Data Administration		Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>			Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>		
Customer - Sheet1														Property - Sheet1		
Session Settings																

Activity 6: Create A Check Box Field on User

- Setup go to Object Manager then go to Search for User select Fields and Relationships

Setup Home Object Manager ▾

SETUP Object Manager

51+ Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			
Associated Location	AssociatedLocation	Standard Object			

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

Details

Description

API Name

User

Custom

Singular Label

User

Plural Label

Users

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Standard salesforce.com Help Window

SETUP > OBJECT MANAGER

User

Fields & Relationships

31+ Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
About Me	AboutMe	Text Area(1000)		
Active	IsActive	Checkbox		✓
Address	Address	Address		
Admin Info Emails	ReceivesAdminInfoEmails	Checkbox		
Alias	Alias	Text(8)		✓
Allow Forecasting	ForecastEnabled	Checkbox		
Banner Photo	BannerPhotoId	Lookup(Photo)		
Call Center	CallCenterId	Lookup(Call Center)		✓
Chatter Email Highlights Frequency	DigestFrequency	Picklist		

SETUP > OBJECT MANAGER

User

Fields & Relationships

User Page Layouts

Field Types

- Auto Number
- Formula
- Roll-Up Summary
- Checkbox
- Hierarchical Relationship
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone

User
New Custom Field

Step 1. Choose the field type

Data Type

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Hierarchical Relationship

Step 1

Next Cancel

2. Create new Field Named as “Verified” as Data type “Check Box”

Step 2. Enter the details

Step 2 of 4

Field Label [i]

Default Value Checked Unchecked

Field Name

Description

Help Text

Auto add to custom report type Add this field to existing custom report types that contain this entity [i]

Previous Next Cancel

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

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

Step 4. Add to page layouts

Step 4 of 4

Previous Save & New **Save** Cancel

Field Label	Verified
Data Type	Checkbox
Field Name	Verified
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name

Community Member Layout

User Layout

User Profile Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Activity7: Create Users

User1

1. Go to Setup then from Administration select Users then New User.

The screenshot shows the Salesforce Setup interface under the 'Users' section. On the left, there's a sidebar with various options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a prominent 'Users' option which is selected and highlighted in yellow. Below the sidebar, a search bar contains the text 'users'. The main content area is titled 'All Users' and contains a table listing several users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. At the bottom of the table, there are three buttons: 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A red arrow points to the 'New User' button.

2. Last Name - Executive

3. Role - Sales Executive

4. License - Salesforce

5. Profile - System Administrator

6. Save

This screenshot shows the 'User Edit' screen for a user named 'Executive'. The 'General Information' section is visible, with fields for First Name, Last Name (set to 'Executive'), Alias ('exec'), Email ('jyoti612199@gmail.com'), Username ('exejiy06@gmail.com'), Nickname ('kraj'), Title, Company, Department, and Division. To the right of these fields is a list of roles: Sales Executive (selected), Salesforce (User License), System Administrator (Profile), and Active (checkbox checked). A red box surrounds the 'Last Name' field and the 'Role' section. A red arrow points to the 'Save' button at the top right of the form.

User2

1. Go to Setup then from Administration select Users then New User.
2. Last Name - Manager
3. Role - Sales Manager
4. License - Salesforce Platform
5. Profile - Manager
6. Save

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'User Edit' screen under the 'Users' tab. The 'General Information' section is visible, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' field is set to 'Sales Manager'. The 'User License' field is set to 'Salesforce Platform'. The 'Profile' field is set to 'Manager'. The 'Active' checkbox is checked. A red box highlights the 'Save' button at the top right of the form, and another red box highlights the 'Role' and 'User License' sections. The status bar at the bottom indicates 'Data.com Monthly'.

User3

1. Go to Setup then from Administration select Users then New User.
2. Last Name - Customer
3. Role - Customer
4. License - Salesforce Platform

5. Profile - Customer
6. Make Sure the verified check box is "Unchecked"
7. Save

The screenshot shows the 'User Edit' screen in the Salesforce Setup. The 'General Information' section on the left includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Profile' section on the right includes Role (Customer), User License (Salesforce Platform), Profile (Customer), Active (checkbox checked), and various other user types like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The 'Data.com User Type' dropdown is set to '--None--'.

User4

1. Go to Setup then from Administration select Users then New User.
2. Last Name - Customer2
3. Role - Customer
4. License - Salesforce Platform
5. Profile - Customer

User Edit

General Information

Last Name: Customer2

Nickname: cust22

Role: Customer

Active:

6. Make Sure the verified check box is “checked”.

SETUP

Users

Street: []

City: []

Zip/Postal Code: []

State/Province: []

Country: []

Single Sign On Information

Federation ID: []

Additional Information

Verified:

Locale Settings

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

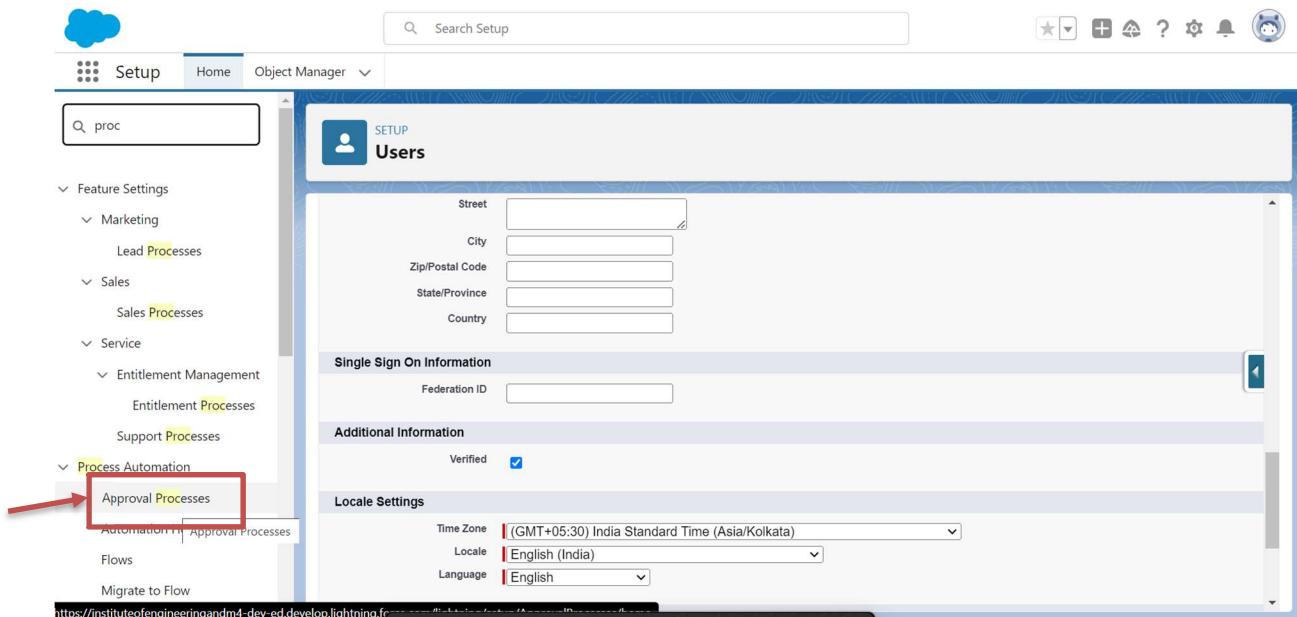
Locale: English (India)

Language: English

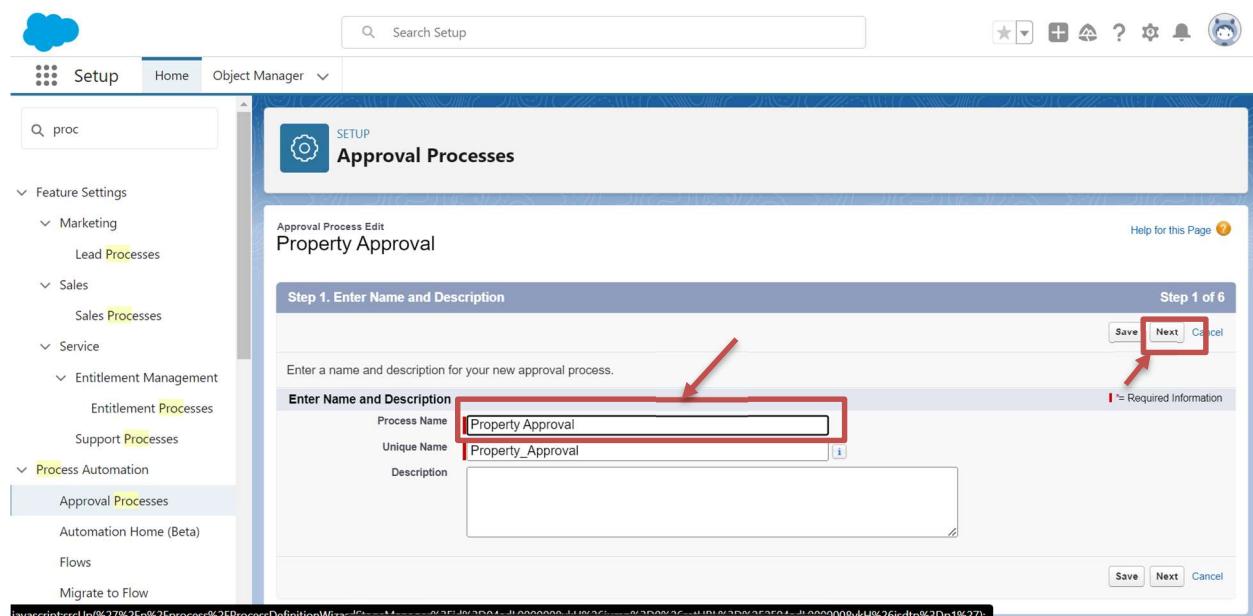
7. Save

Activity 8: Create An Approval Process for Property Object

- From Setup search Process Automation and select Approval Process



- Process Name - Property Approval



- Give 2 criteria -

- a. Location is not equal to blank,
- b. Verified Equals false.

Step 2. Specify Entry Criteria

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.

Specify Entry Criteria

Use this approval process if the following criteria are met :

Field	Operator	Value	Logic
Property: Location	not equal to	Blank	AND
Property: Verified	equals	False	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

[Add Filter Logic...](#)

4. Click next and "Next Automated Approver Determined By" Select Manager
5. From Record Editability Properties click on Administrators OR the currently assigned approver can edit records during the approval process.

Property Approval

Step 3. Specify Approver Field and Record Editability Properties

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By

Use Approver Field of Property Owner

Record Editability Properties

Administrators ONLY can edit records during the approval process.
 Administrators OR the currently assigned approver can edit records during the approval process.

6. From Step 5. Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.

The screenshot shows the 'Approval Processes' setup page under the 'SETUP' tab. On the left, a list of 'Available Fields' includes 'Created By', 'Last Modified By', 'Property Name', and 'Verified'. On the right, a list of 'Selected Fields' contains 'Property Owner', 'Location', and 'Type', which are highlighted with a red box. Below these lists are 'Add' and 'Remove' buttons, and 'Up' and 'Down' sorting buttons. To the right of the lists is a preview window showing a report titled 'Executive Report - EX001-0001' with various data tables. At the bottom right of the main area is a link: 'Click here to view an example'.

7. Click Next and Select the Initial Submitters
 - a. Owner - Property Owner
 - b. Roles - Sales Manager

The screenshot shows the 'Initial Submitters' setup page. At the top, there is a search bar with 'Submitter Type: Search: Owner' and a 'Find' button. Below this are two sections: 'Available Submitters' (containing '--None--') and 'Allowed Submitters' (containing 'Role: Sales Manager' and 'Property Owner', both highlighted with a red box). Below these sections are 'Add' and 'Remove' buttons.

8. Save.
9. Add an approval step name "Executive Approval"

Executive Approval

Step 1. Enter Name and Description Step 1 of 3

Enter a name, description, and step number for your new approval step.

Enter Name and Description

Approval Process Name: Property_Approval

Name: Executive Approval

Unique Name: Executive_Appr

Description: Executive Approval

Save Next Cancel

NodeWizardSt

10. Specify the Criteria as All record should enter

Executive Approval

Step 2. Specify Step Criteria Step 2 of 3

Specify whether a record must meet certain criteria before entering this approval step. If these criteria are not met, the approval process can skip to the next step, if one exists.

Learn more

Specify Step Criteria

All records should enter this step.

Enter this step if the following criteria are met, else reject record:

Previous Save Next Cancel

11. Click next and select the Approver as "Sales Executive "and "Save"

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Select Approver

Let the submitter choose the approver manually.

Automatically assign using the user field selected earlier. (Manager)

Automatically assign to queue.

Automatically assign to approver(s).

User: Executive

When multiple approvers are selected:

Approve or reject based on the FIRST response.

Require UNANIMOUS approval from all selected approvers.

The approver's delegate may also approve this request.

Previous Save Cancel

12. Add One field Update as "Verified Property"

Search Setup

Home Object Manager

Process Automation

Workflow Actions

Field Updates

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

Process Name	Property Approval	Active	✓
Unique Name	Property_Approval	Next Automated Approver	Determined By Manager of Record Submitter
Description			
Entry Criteria	(Property: Location NOTEQUAL TO Blank) AND (Property: Verified EQUALS False)		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Role_Sales Manager, Property Owner		
Created By	Jyoti Gupta	Created On	24/06/2024, 2:27 pm
Modified By	Jyoti Gupta	Modified On	28/06/2024, 3:14 pm

Initial Submission Actions

Add Existing Add New

Action Type	Description
-------------	-------------

- Select Object - Property
- Field to Update - Verified
- Field Data Type - Checkbox
- Select Checkbox Option as "True"
- Save.

SETUP

Field Updates

Identification

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"/>

Specify New Field Value

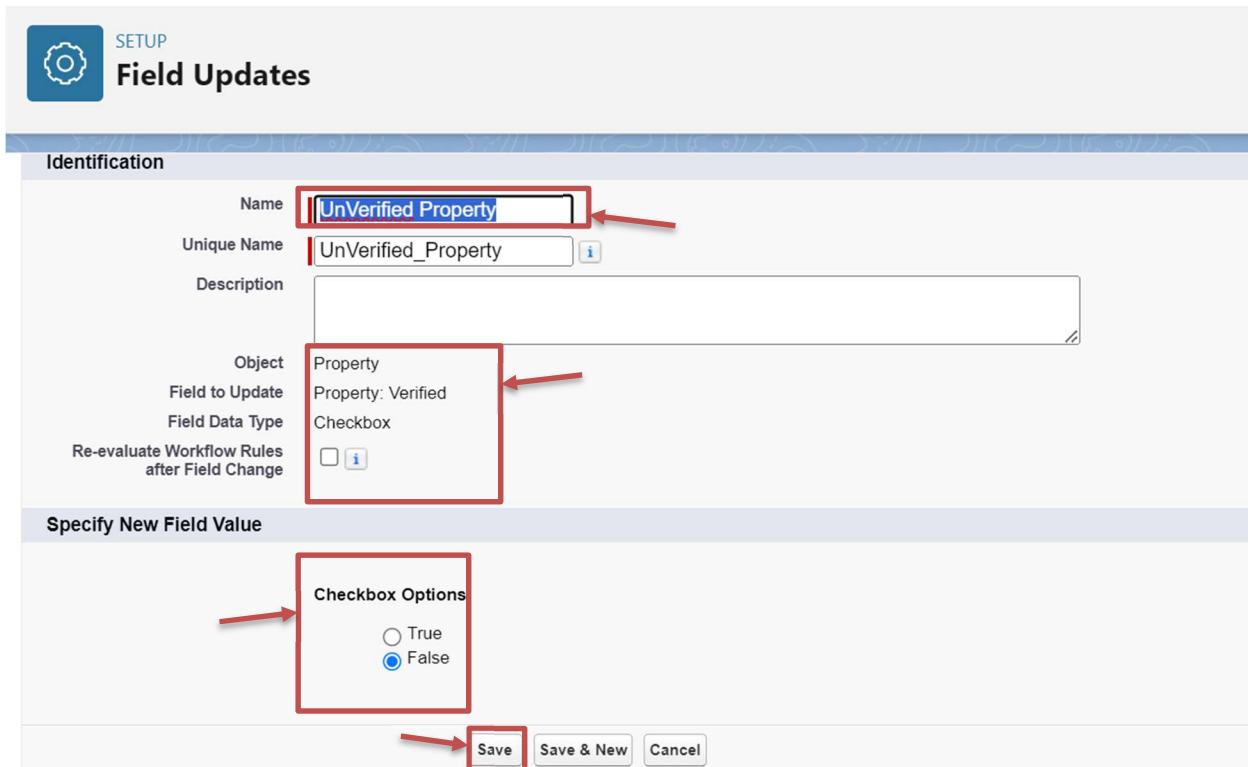
Checkbox Options
<input checked="" type="radio"/> True
<input type="radio"/> False

Save Save & New Cancel

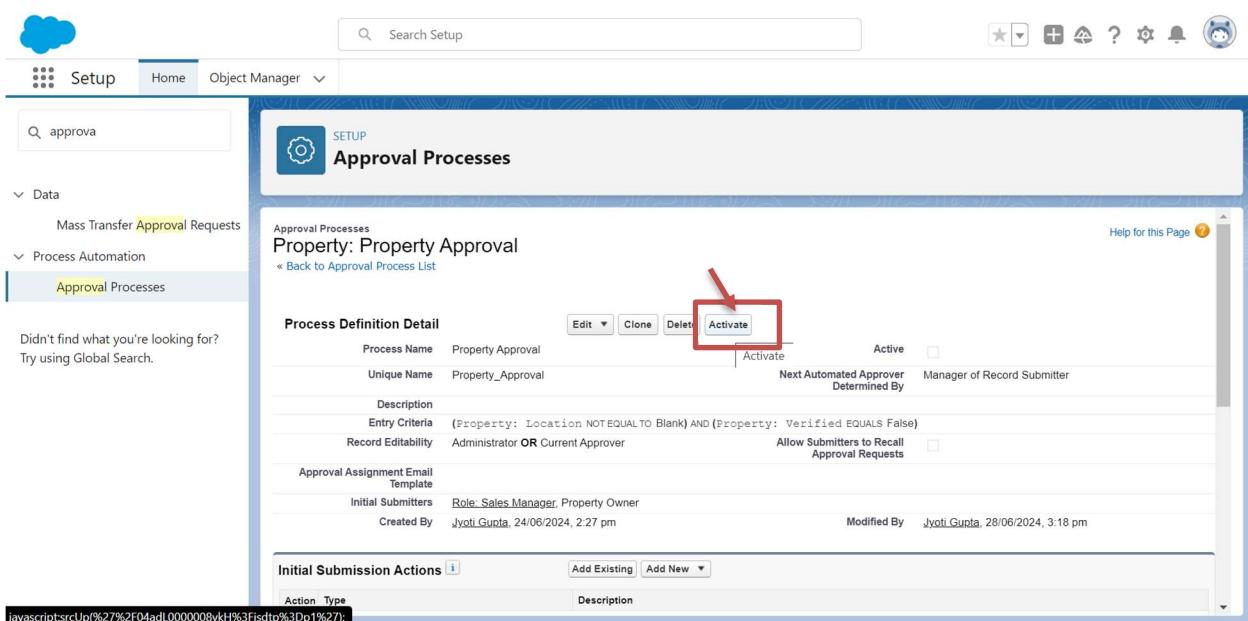
13. Add One field Update as "UnVerified Property"

- Select Object - Property

- b. Field to Update - Verified
- c. Field Data Type - Checkbox
- d. Select Checkbox Option as "False"
- e. Save.



14. Activate the Approval Process.



Activity 9: Create A Record Trigger Flow to Submit the Approval Process Automatically

1. From Setup Search for Flows then Click on New and Select “Record Trigger Flow”.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Process Automation', the 'Flows' item is highlighted with a red box and arrow. The main content area displays the 'Approval Processes' screen for a process named 'Property Approval'. The 'Process Definition Detail' section includes fields like Process Name (Property Approval), Unique Name (Property_Approval), and Active status (checked). The 'Initial Submission Actions' section is visible at the bottom.

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Flows' item is highlighted with a red box and arrow. The main content area displays the 'Flows' screen. At the top right, there is a blue button labeled 'New Flow' with a red box and arrow around it. Below the button, there is a section titled 'Try the Automation Lightning App!' and a table titled 'Flow Definitions' showing several flow definitions.

Select Type

Recommended

- Screen Flow

Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
- Schedule-Triggered Flow

Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
- Autolaunched Flow (No Trigger)

Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
- Record-Triggered Flow**

Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
- Platform Event—Triggered Flow

Launches when a platform event message is received. This autolaunched flow runs in the background.
- Record-Triggered Orchestration

Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

[Back](#) [Create](#)

2. Select Object as Property
3. Select "Trigger the flow when" - "A record is created"
4. Set Entry Conditions - "None"
5. Add a "Action" - "Submit for Approval"

Flow Builder

Start Record-Triggered Flow

Object: **Property** Trigger: **A record is created** Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional) [Open Flow Trigger Explorer for Property](#)

End

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object: **Property**

Configure Trigger

*Trigger the Flow When:

A record is created

A record is updated

A record is created or updated

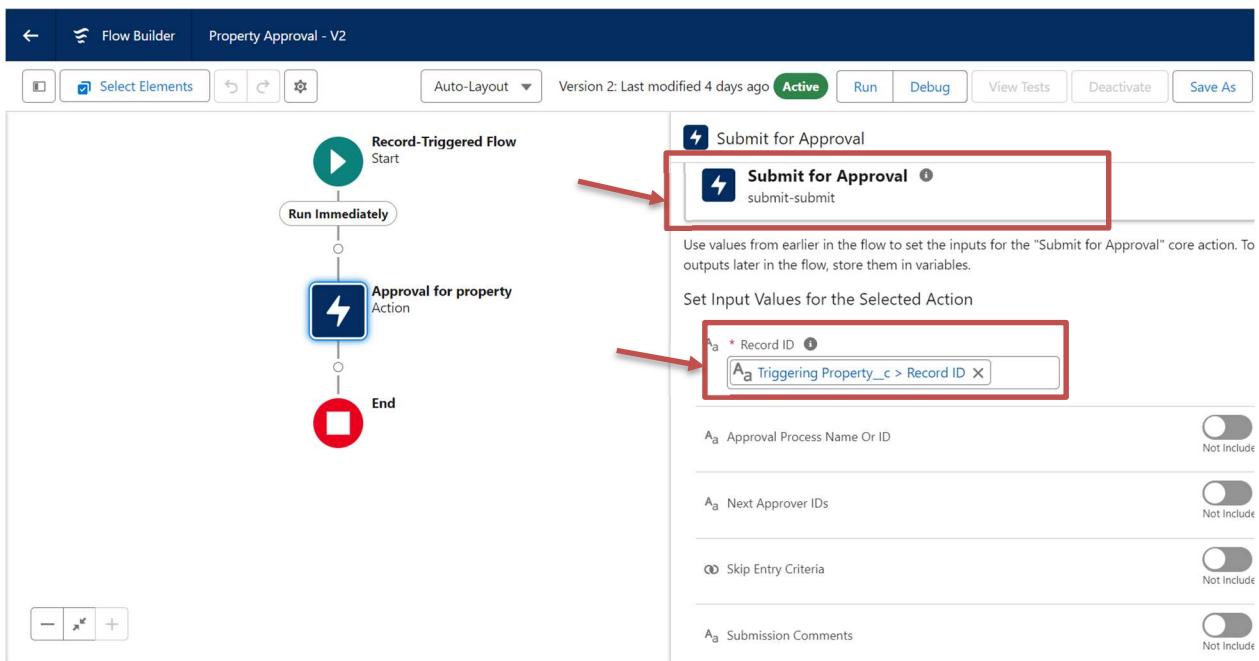
A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the [Only when a record is updated to meet the condition requirements](#) option for When to Run the Flow for Updated Records.

6. Give Label - Approval for property
7. Record Id - `{!$Record.Id}`



8. Done.

9. Save the Flow and Give label as "Property Approval" and "Activate"

Save as

A New Version A New Flow

* Flow Label

Property Approval

* Flow API Name ⓘ

Approval_for_property

Description

Approval for property

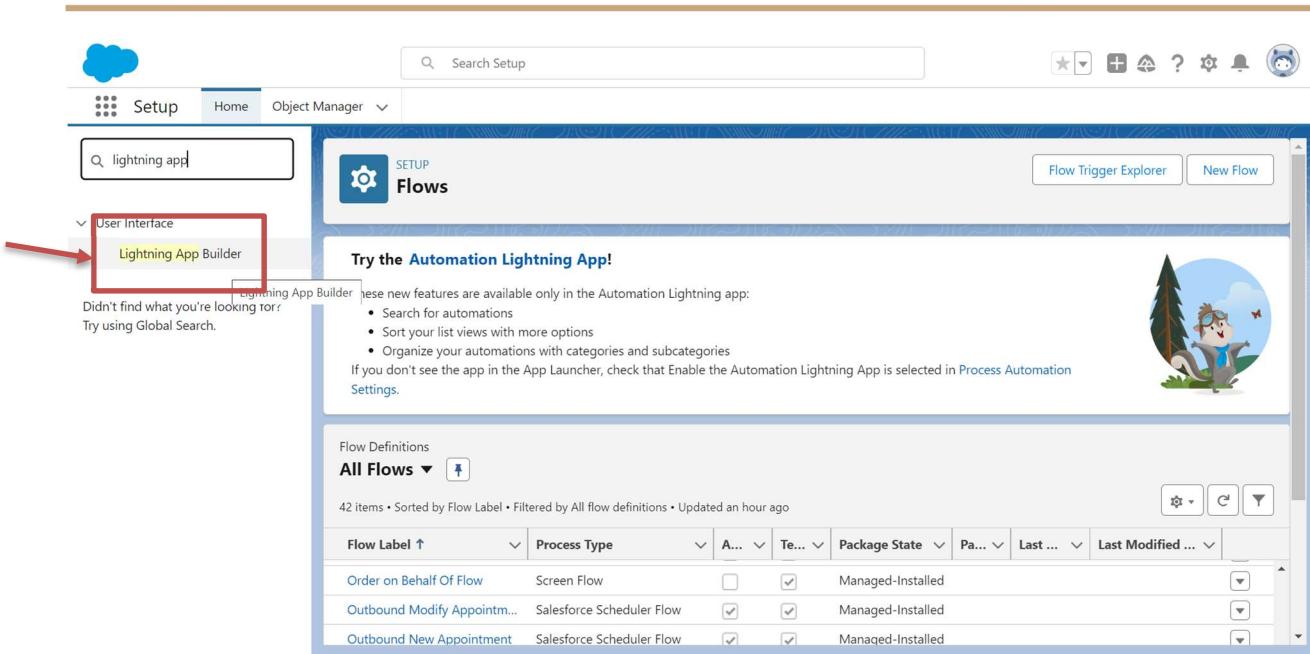
Show Advanced

Cancel

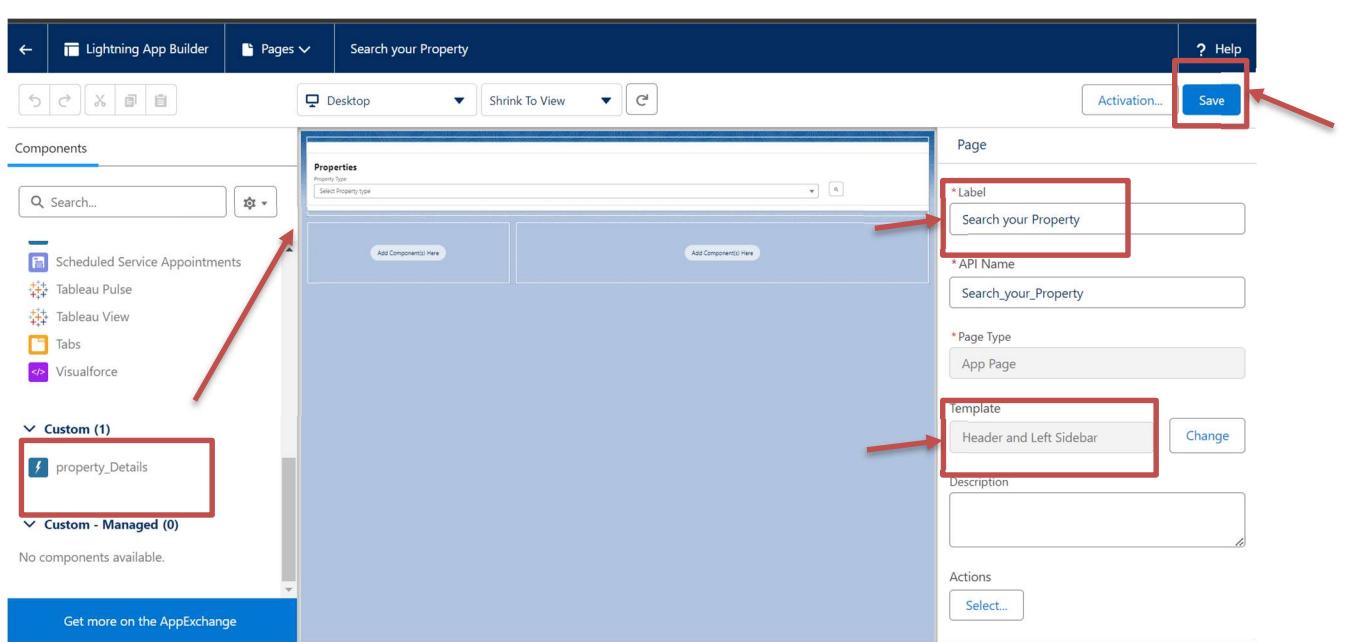
Save

Activity 10: Create An App Page

- From Setup go to Lightning App Builder Then Click on New and Select App Page then Click on Next.



2. Give Label as “Search your Property” click “Next”.
3. Click “Header and Left Sidebar” and click on “Done”
4. Click on “Save” and then click on “Activate”.
5. From Page Setting select page activation as “Activate for all Users”.
6. From Lightning Experience Click on “Property Details” and click on Add Page “.”
7. Then Click on “Save”



Activity 11: Create A LWC Component

Create an LWC Component for the customers so that only verified customers can access the verified properties and non-Verified customers can access non verified properties, and deploy it on “Search your Property Page”.

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

Code: -

```
public class PropertHandler_LWC{
    @AuraEnabled(cacheable=true)
    public static list<Property__c> getProperty(string type , boolean verified){
        return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM
Property__c Where Type__c =: type AND Verified__c =: verified];
    }
}
```

```

PropertHandler_LWC.apxc *
Code Coverage: None | API Version: 61 | Go To
1 public class PropertHandler_LWC{
2
3     @AuraEnabled(cacheable=true)
4
5     public static list<Property__c> getProperty(string type , boolean verified){
6
7         return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM Property__c
8                 Where Type__c =: type AND Verified__c =: verified];
9
10    }
11
12 }

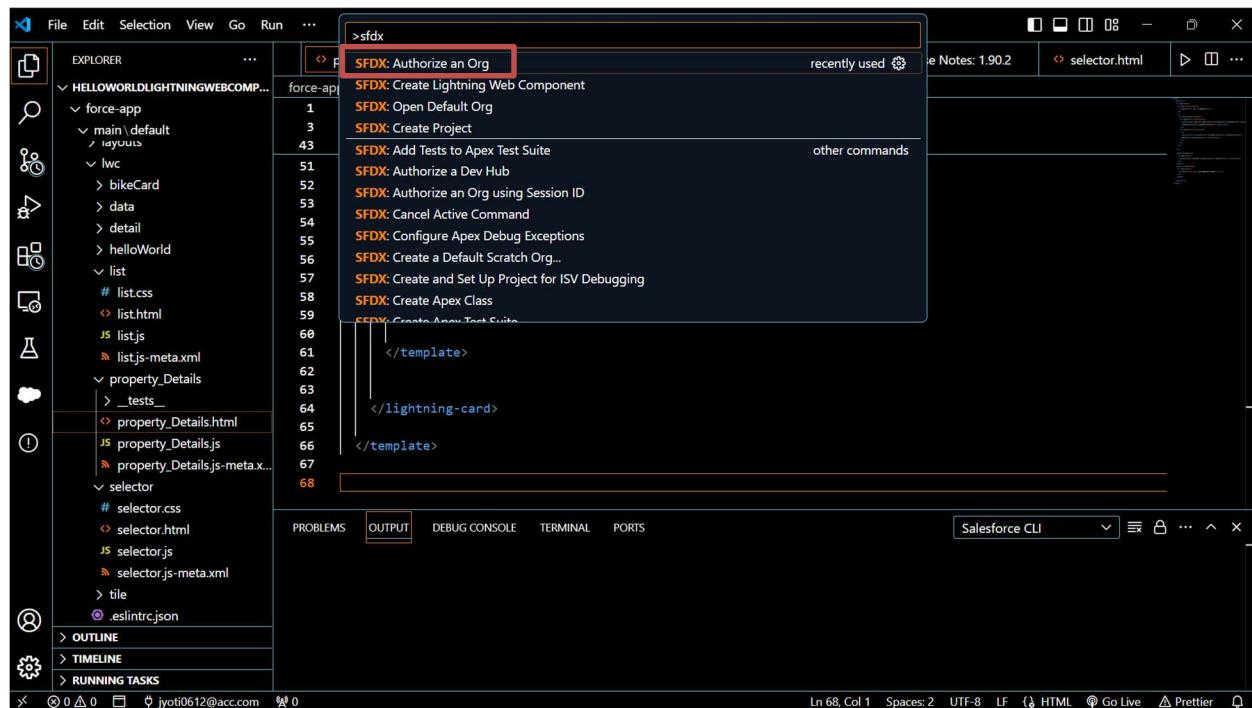
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User Application Operation Time Status Read Size

Filter Click here to filter the log list

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.
5. In your Html File Write this code :-

Code :-

```
<template>
  <lightning-card>
    <div class="slds-box">
      <div class="slds-text-align_left">
        <h1 style="font-size: 20px;"><b>Properties</b></h1>
      </div>
      <div>
        <div class="slds-grid slds-gutters">
          <div class="slds-col slds-size_5-of-6">
            <lightning-combobox name="Type" label="Property Type" value={typevar}
placeholder="Select Property type"
              options={propertyoptions}          onchange={changehandler}></lightning-
combobox>
          </div>
          <div class="slds-col slds-size_1-of-6">
            <br>
            <lightning-button-icon    variant="neutral"    icon-name="standard:search"
alternative-text="Search"
              label="Search" onclick={handleClick}></lightning-button-icon>
          </div>
        </div>
      </div>
    </div>
    <template if:true={istrue}>
      <div class="slds-box">
        <lightning-datable key-field="id" data={propertylist} columns={columns}>
        </lightning-datable>
      </div>
    </template>
    <template if:false={isfalse}>
      <div class="slds-box">
        <div style="font-size: 15px;"><b>No properties Are Found !!</b></div>
      </div>
    </template>
  </lightning-card>
</template>
```

```

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

```

6. In Your Js File Write this code :-

Code :-

```

import { LightningElement, api, track, wire } from 'lwc';
import getProperty from "@salesforce/apex/PropertHandler_LWC.getProperty"
import { getRecord } from 'lightning/uiRecordApi';
import USER_ID from '@salesforce/user/Id';
export default class C_01_Property_Management extends LightningElement {
  @api recordId
  userId = USER_ID;
  verifiedvar
  typevar
  isfalse = true;
  istrue = false;
  @track propertylist = [];
  columns = [
    { label: 'Property Name', fieldName: 'Property_Name__c' },
    { label: 'Property Type', fieldName: 'Type__c' },
    { label: 'Property Location', fieldName: 'Location__c' },
    { label: "Property link", fieldName: "Property_link__c" }
  ]
  propertyoptions = [
    { label: "Commercial", value: "Commercial" },
    { label: "Residential", value: "Residential" },
    { label: "rental", value: "rental" }
  ]
}

```

```
]

@wire(getRecord, { recordId: "$userId", fields: ['User.Verified__c'] })
recordFunction({ data, error }) {
    if (data) {
        console.log(data)
        console.log("This is the User Id ---> "+this.userId);
        this.verifiedvar = data.fields.Verified__c.value;
    } else {
        console.error(error)
        console.log('this is error')
    }
}
changehandler(event) {
    console.log(event.target.value);
    this.typevar = event.target.value;
}
handleClick() {
    getProperty({ type: this.typevar, verified: this.verifiedvar })
        .then((result) => {
            this.isfalse = true;
            console.log(result)
            console.log('This is the User id ---> ' + this.userId);
            console.log('This is the verified values ---> ' + this.verifiedvar);
            if (result != null && result.length != 0) {
                this.isTrue = true;
                this.propertylist = result;
                console.log(this.verifiedvar);
                console.log(this.typevar)
            } else {
                this.isfalse = false;
                this.isTrue = false;
            }
        })
        .catch((error) => {
            console.log(error)
        })
}
```

```

    }
}

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.

Code :-

```

<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
    <apiVersion>59.0</apiVersion>
    <isExposed>true</isExposed>
    <targets>
        <target>lightning__RecordPage</target>
        <target>lightning__AppPage</target>
        <target>lightning__HomePage</target>
    </targets>
</LightningComponentBundle>

```

```

1 <?xml version="1.0" encoding="UTF-8"?>
2
3 <LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
4
5     <apiVersion>59.0</apiVersion>
6
7     <isExposed>true</isExposed>
8
9     <targets>
10
11         <target>lightning__RecordPage</target>
12
13         <target>lightning__AppPage</target>
14
15         <target>lightning__HomePage</target>
16
17     </targets>
18
19 </LightningComponentBundle>

```

8. After Saving all the three Codes , Right Click and deploy this component to the org.

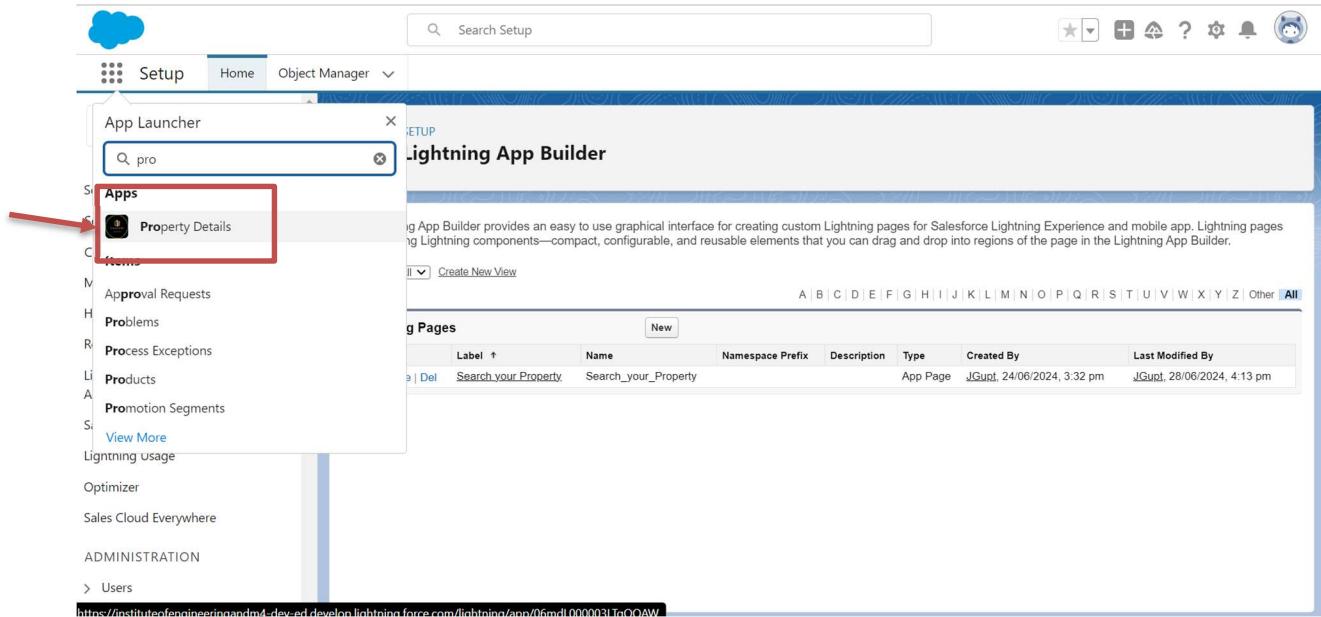
The screenshot shows the VS Code interface with the following details:

- File Explorer:** Shows a folder named "HELLO" containing "New File...", "New Folder...", "Reveal in File Explorer", "Open in Integrated Terminal", "New Java File", "New Java Project...", "Maven", "Find in Folder...", "Cut", "Copy", "Paste", "Copy Path", "Copy Relative Path", "Rename...", "Delete", and "SFDX: Delete from Project and Org". A context menu is open over the "Delete" option, with the "SFDX: Deploy This Source to Org" option highlighted.
- Code Editor:** Displays the XML code for the Lightning Component Bundle.
- Terminal:** Shows the command "16:27:32.745 ended SFDX: Deploy This Source to Org".
- Status Bar:** Shows file statistics: Ln 6, Col 1, Spaces: 4, UTF-8, LF, XML, Go Live, Apex PMD, Prettier.

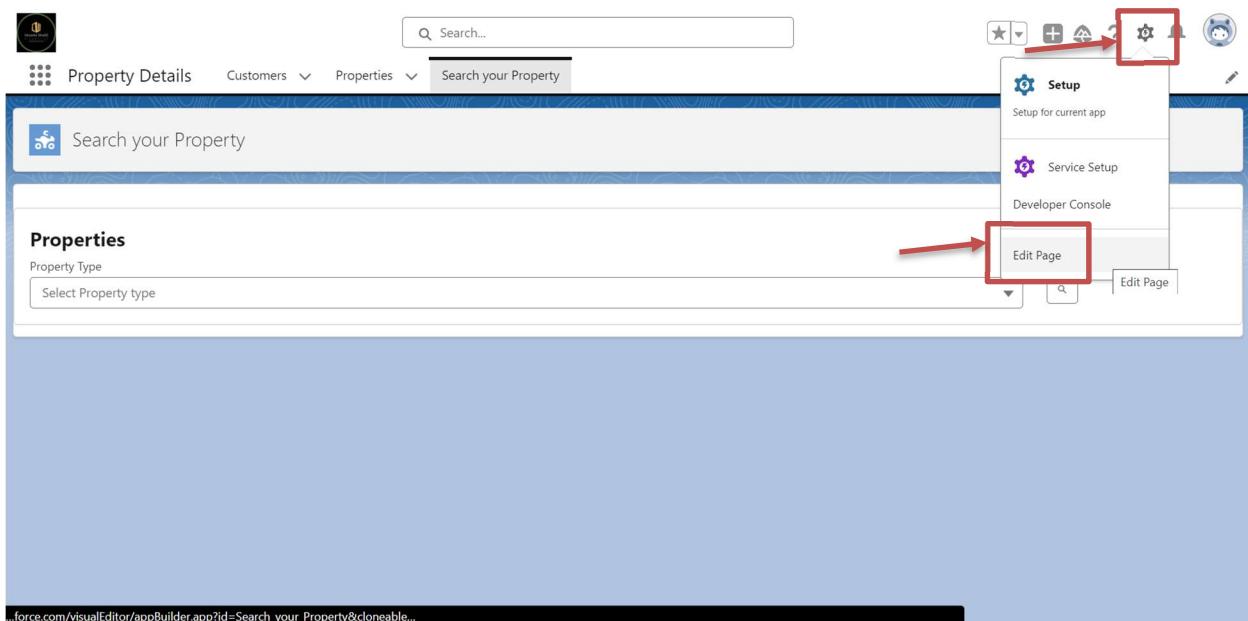
Activity 12: Drag This Component To Your App Page

Adding the Component to your Page

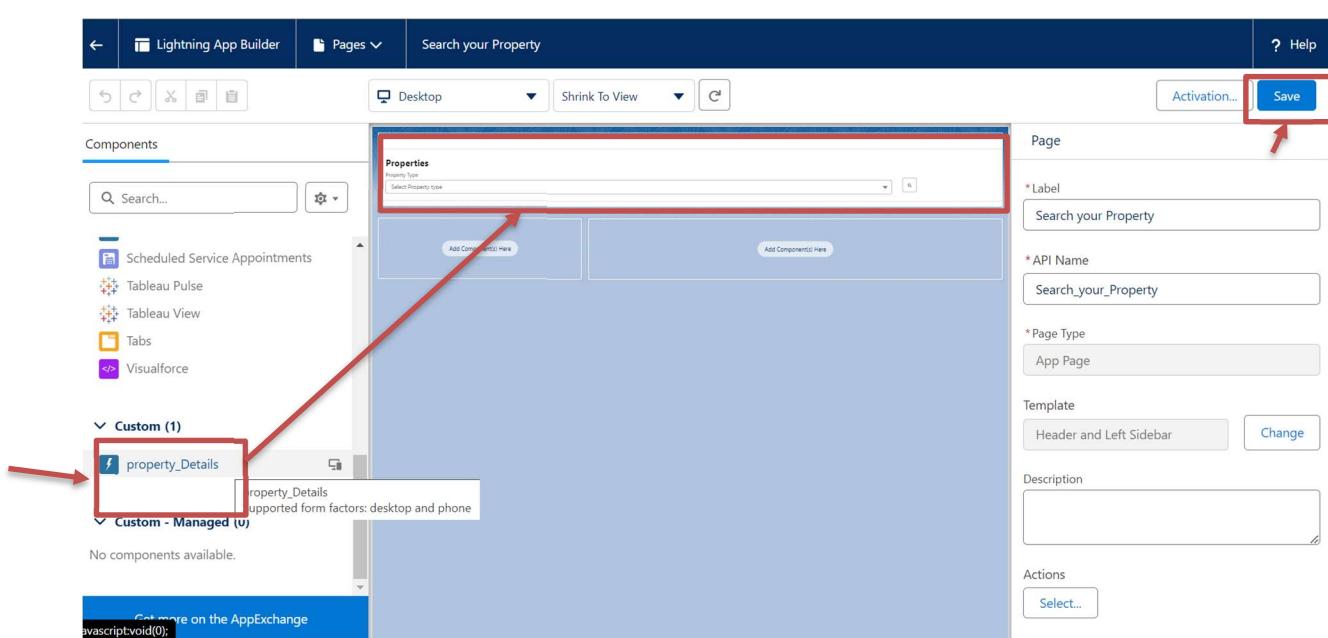
1. From Setup go to App Launcher and select Search for Property Details



2. On this Page click on gear icon and click on Edit Page

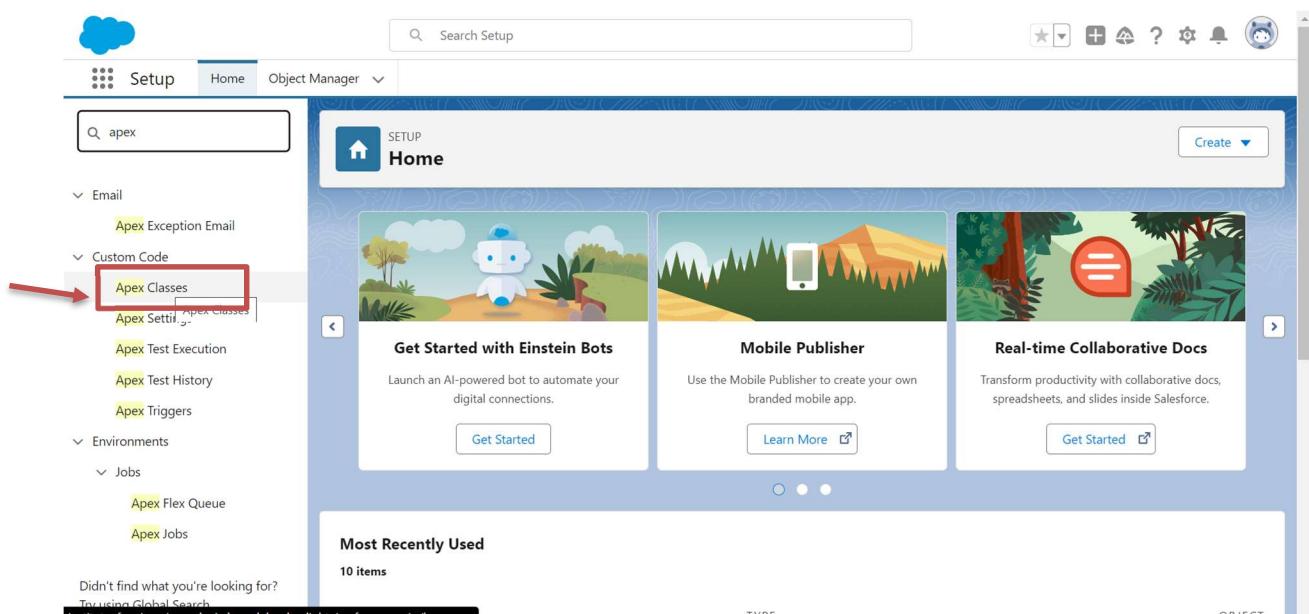


3. Drag the Component to your App Page and Save the Page.



Activity 13: Give Access of Apex Classes to Profiles

- From Setup search for Apex Classes and click on "Security" behind "PropertyHandler__LWC".



Percent of Apex Used: 0.01%
You are currently using 303 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 [i](#)
Compile all classes [i](#)

View: All [Create New View](#)

Action	Name ↑	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Delete Security	PropertHandler_LWC		61.0	Active	303	Jyoti Gupta, 24/06/2024, 3:37 pm	<input type="checkbox"/>

Security - Record 1 - PropertHandler_LWC

Dynamic Apex Classes

Dynamic Apex extends your programming reach by interacting with Lightning Platform components.

View: All [Create New View](#)

Class Name ↑	Namespace Prefix	Api Version	Created By	Last Modified By
No records to display.				

profile%2FApexClassProfilePermissionEdit%2Fe%3Fapex_id%3D01pdl000003dbpC%26apex_name%3DPropertHandler_LWC%26apex_namespace%3D%26save_button%3Dhas_save_but...

2. From Profiles Add “Manager” and “Customer” and “Save”.

Enable Profile Access for Apex Class
PropertHandler_LWC

Save Cancel

Available Profiles	Enabled Profiles
Analytics Cloud Integration User Analytics Cloud Security User 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 Customer Portal Manager Custom	Customer Manager System Administrator

Add [▶](#) Remove [◀](#)