

Project Title: Property Handling

1. Project Overview

The "CRM Application to Handle Clients and Their Property-Related Requirements" is an end-to-end solution developed on the Salesforce platform. This project aims to streamline property management for real estate concerns by automating client record creation, form property listings, and apply secure, role-based access control. It enhances the efficiency of managing client data and property listings while providing a tailored customer undergo based on check status.

This project includes three major components:

1. Automated Client Data Collection and Integration: To simplify customer data intake, the project integrates Jot-form with Salesforce. Jot form serves as a user-friendly interface for collecting customer data, which is directly submitted to Salesforce, where a new customer record is automatically created upon each form submission. This integration minimizes manual data entry, reduces errors, and speeds up client onboarding.

2. Property Management and Approval Workflow: A consecrate Property Details App centralize all property data, making it easier to manage listings, track property details, and ease approvals. Each property record undergoes an approval process before it is published, ensuring that only properties meeting the agreement's standards are accessible to customers. An automated record triggered flow further streamlines this process by auto-submitting property records for approval, reducing the need for manual intervention.

3. Role-Based and Verification-Based Access Control: Access control is a key feature of this CRM solution. Profiles and roles are created based on business demand to limit data profile and actions based on user roles. in addition, a custom Lightning Web Component (LWC) is developed to manage property visibility based on customer verification status. Verified customers have access to verified properties, whereas non-verified customers are restricted to non-verified property listings. This feature enhances protection by ensuring that only authorized users have access to sensitive property data, while still providing non-verified users access to relevant listings.

2. Objectives

Business Goals:

1. Automate customer data entry by integrating Jot form with Salesforce to create customer records seamlessly.

2. Implement property management features that allow for easy creation, approval, and monitoring of property listings.
3. Enhance user access control through customized roles, profiles, and approval processes to ensure data security and efficient workflow.

Specific Outcomes:

1. Automated creation of customer records upon Jot form submission.
2. Comprehensive app for property details, streamlining property management.
3. An automated approval process for property listings to improve decision-making and data validation.
4. Enhanced user interface through the use of a custom Lightning Web Component (LWC).

3. Salesforce Key Features and Concepts Utilized

1. Integration with JotForm: Enabled automatic record creation for customers, saving time and reducing manual errors.
2. Custom Roles and Profiles: Tailored user access to ensure proper data security and workflow efficiency. Created custom objects in Salesforce by importing data from spreadsheets, ensuring easy migration of existing client and property data into the Salesforce environment.
3. Approval Process: Automated the property approval process to facilitate quick decision-making.
4. Record Trigger Flow: Designed a record-triggered flow that automatically submits property records for approval, reducing manual intervention and speeding up the property listing process.
5. Lightning Web Component (LWC): Enhanced user interface by providing custom components and improved user interaction.
6. Property Details App : Built a dedicated Property Details App to centralize all property-related data, simplify property management, and ensure all property data is

accessible within a single coating.

Milestone 1: Create a Jot form and integrate it with the org to create a record of customers automatically.

https://form.jotform.com/24300267753051

Fill Form

PhoneTabletDesktopPreview Form

Form

Name *

First NameLast Name

Email

example@example.com

Phone Number

(000) 000-0000

Please enter a valid phone number.

Which type of property are you looking for?

☐ Residential

☐ Commercial

☐ Rental

Jotform

Now create your own Jotform - It's free!

Create your own Jotform

Create Objects from Spreadsheet

SetupHomeObject Manager

Search Setup

StarShareHelpFeedback

SETUP > OBJECT MANAGER

Customer

Details

Fields & Relationships

13 Items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Budget Amount	Budget_Amount_c	Currency(18, 0)		
City	City_c	Text(50)		
Created By	CreatedById	Lookup(User)		
Customer	Customer_c	Text(100)		
Customer Name	Name	Text(80)		✓
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number_c	Phone		
Postal Code	Postal_Code_c	Number(6, 0)		
Property Type	Property_Type_c	Picklist		
State	State_c	Text(50)		
Street Address	Street_Address_c	Text(100)		
Street Address Line 2	Street_Address_Line_2_c	Text(100)		

CRM Application to Handle Clients and Their Property-Related

Setup

Home

Object Manager

Q Search Setup

Setup > OBJECT MANAGER

Property

Details

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location_c	Text(50)		
Owner	OwnerId	Lookup(User,Group)		✓
Property Name	Property_Name_c	Text(100)		
Property Name	Name	Text(80)		✓
Type	Type_c	Picklist		
Verified	Verified_c	Checkbox		

Integrate Jot form with Salesforce Platform

Jotform

Form Builder

Form

Last edited at 6:58 AM

Add Collaborators

Help

BUILD

SETTINGS

PUBLISH

Preview Form

FORM SETTINGS

Customize form status and properties

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/

Formerly Approvals

Turn your form into a workflow

JOTFORM SIGN

Power your forms with Jotform Sign

MOBILE NOTIFICATIONS

Customize mobile app notifications

Select a Salesforce Object

Customer

Create a record

Send data from form fields to matched Salesforce fields

Object Fields

Form

Customer

Name - First Name

City

Address - City

Budget Amount

Budget Amount

Property Type

Which type of property are you lookin...

Phone Number

Phone Number

Street Address

Address - Street Address

Email

Email

Customer Name

Name - Last Name

State

Address - State

Street Address Line 2

Address - Street Address 2

Add Field

Give Feedback

Create Roles

The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar contains a navigation menu with 'Users' and 'Roles' (highlighted). The main content area displays the 'Sales Executive' role details. Below the role name, a hierarchy is shown: ClientEstate Hub > CEO > SVP_Sales & Marketing > VP_North American Sales > Sales_Representative > Sales Executive. The 'Role Detail' section includes fields for Label, Modified By, Opportunity Access, Case Access, Role Name, Role Name as displayed on reports, and Sharing Groups. The 'Users in Sales Executive Role' table lists one user: 'Executive' with the username 'executive.clientestate@hub.in' and an active status.

Role Detail

Field	Value
Label	Sales Executive
Modified By	ClientEstate Hub
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
Role Name	Sales_Executive
Role Name as displayed on reports	Sales_Executive
Sharing Groups	Role, Role and Internal Subordinates

Users in Sales Executive Role

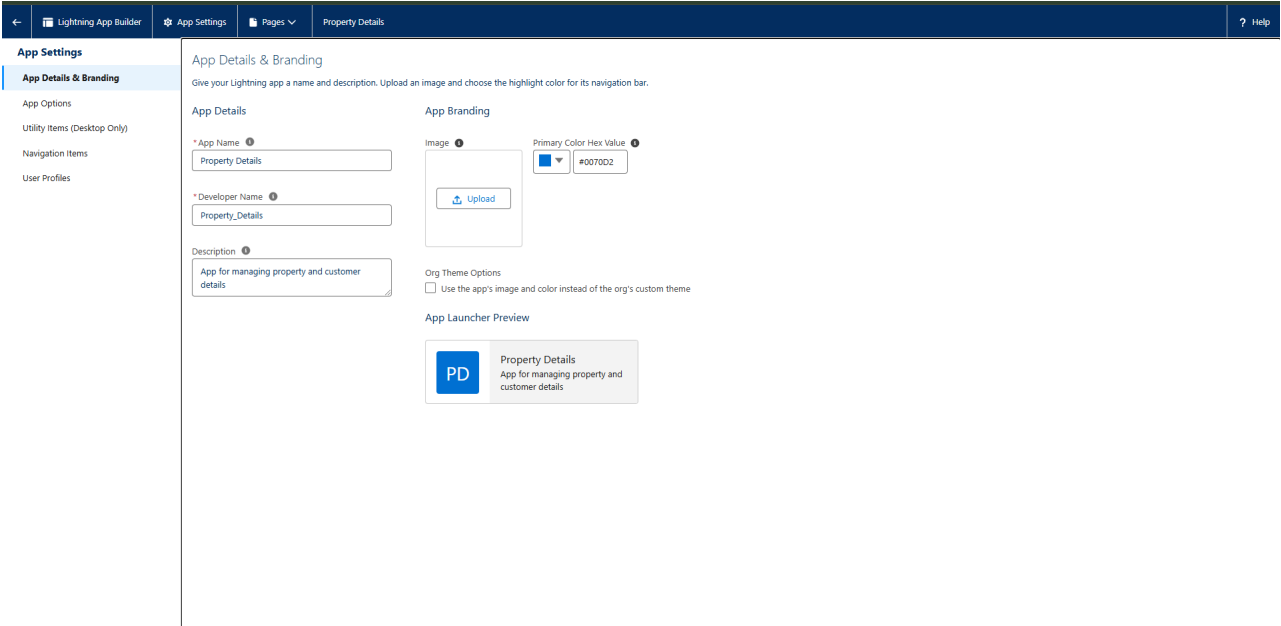
Action	Full Name	Alias	Username	Active
Edit	Executive	Exec	executive.clientestate@hub.in	✓

The screenshot shows the Salesforce Setup interface for the 'Roles' section, displaying a hierarchical tree of roles. The left sidebar contains a navigation menu with 'Users' and 'Roles' (highlighted). The main content area shows a tree structure of roles, including SVP_Customer Service & Support, Customer_Support_International, Customer_Support_North America, Installation & Repair Services, SVP_Human Resources, SVP_Sales & Marketing, VP_International Sales, VP_Marketing, Marketing Team, VP_North American Sales, Director_Channel Sales, Channel Sales Team, Director_Direct Sales, Eastern Sales Team, Western Sales Team, Sales_Representative, Sales_Executive, Sales Manager, and Customer. Each role has an 'Add Role' button and a link to 'Edit | Del | Assign'.

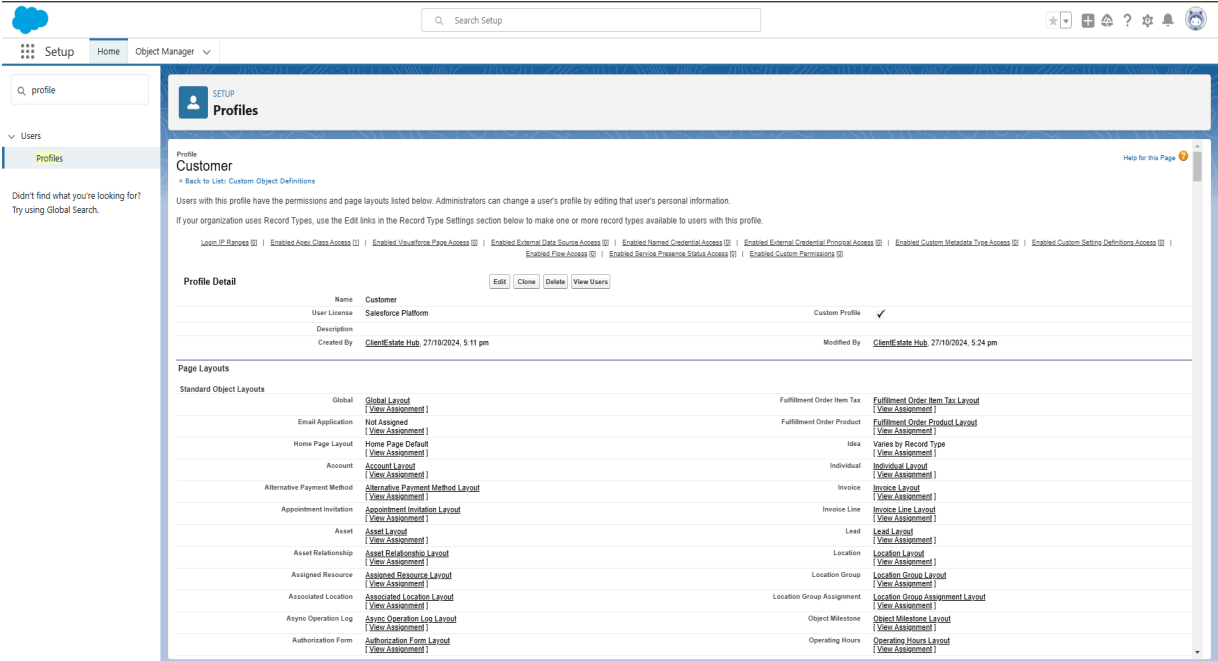
Roles Hierarchy

- SVP_Customer Service & Support
 - Customer_Support_International
 - Customer_Support_North America
 - Installation & Repair Services
- SVP_Human Resources
- SVP_Sales & Marketing
 - VP_International Sales
 - VP_Marketing
 - Marketing Team
 - VP_North American Sales
 - Director_Channel Sales
 - Channel Sales Team
 - Director_Direct Sales
 - Eastern Sales Team
 - Western Sales Team
- Sales_Representative
 - Sales_Executive
 - Sales Manager
 - Customer

Create a Property Details App



Create Profile



CRM Application to Handle Clients and Their Property-Related

Setup

Home

Object Manager

Q Search Setup

profile

Users

Profiles

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

Profile Edit

Manager

Set the permissions and page layouts for this profile

Save

Save & New

Cancel

Name

Manager

User License

Salesforce Platform

Description

Custom Profile

✓

Custom App Settings

Required Information

Analytics Studio (standard__Insights)

Visible

☐

Default

☐

App Launcher (standard__AppLauncher)

Visible

☐

Default

☐

Platform (standard__Platform)

Visible

☒

Default

☒

Property Details (Property_Details)

Visible

☒

Default

☐

WDC (standard__Work)

Visible

☐

Default

☐

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home

Default On

Accounts

Default On

All Sites

Tab Hidden

Alternative Payment Methods

Tab Hidden

Analytics

Tab Hidden

Analytics

Default On

App Launcher

Default On

Appointment Categories

Default Off

Inventory Item Reservations

Tab Hidden

Inventory Reservations

Tab Hidden

Invoices

Tab Hidden

Labels

Default On

Leads

Tab Hidden

Libraries

Tab Hidden

Lightning Bolt Solutions

Default On

Lightning Usage

Default On

Create a Check Box field on user

Setup

Home

Object Manager

Q Search Setup

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

Validation Rules

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

Field Name

Verified

API Name

Verified__c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Created By

ClientEstate Hub

27/10/2024, 5:24 pm

Modified By

ClientEstate Hub

27/10/2024, 5:24 pm

General Options

Default Value

Unchecked

Validation Rules

New

No validation rules defined.

Validation Rules Help

Back To Top

Always show me more records per related list

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Create Users

The screenshot shows the Salesforce Setup page with the 'Users' section selected. The 'User Edit' form for a user named 'Executive' is displayed. The form includes fields for General Information, Role, and various user settings.

General Information:

- First Name: [Empty]
- Last Name: Executive
- Alias: Exec
- Email: sonianurag476@gmail.com
- Username: executive.clientstate@hub.i
- Nickname: User173003024145554286
- Title: [Empty]
- Company: [Empty]
- Department: [Empty]
- Division: [Empty]

Role and Profile:

- Role: Sales Executive
- User License: Salesforce
- Profile: System Administrator

User Settings:

- Active: ☒
- Marketing User: ☐
- Offline User: ☐
- Knowledge User: ☐
- Flow User: ☐
- Service Cloud User: ☐
- Site.com Contributor User: ☐
- Site.com Publisher User: ☐
- WDC User: ☐
- Data.com User Type: -None-
- Data.com Monthly Addition Limit: 300
- Accessibility Mode (Classic Only): ☐
- High-Contrast Palette on Charts: ☐
- Load Lightning Pages While Scrolling: ☒
- Debug Mode: ☐
- Send Apex Warning Emails: ☐
- Make Setup My Default Landing Page: ☐
- Quick Access Menu: ☒
- Development Mode: ☐
- Show View State in Development Mode: ☐
- Cache Diagnostics: ☐

The screenshot shows the Salesforce Setup page with the 'Users' section selected. The 'User Detail' form for a user named 'Executive' is displayed. The form includes fields for User Detail, Role, and various user settings.

User Detail:

- Name: Executive
- Alias: Exec
- Email: sonianurag476@gmail.com [Verified]
- Username: executive.clientstate@hub.i
- Nickname: User173003024145554286
- Title: [Empty]
- Company: [Empty]
- Department: [Empty]
- Division: [Empty]
- Address: [Empty]
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver: [Empty]
- Manager: [Empty]
- Receive Approval Request Emails: Only if I am an approver
- Federation ID: [Empty]
- App Registration: One-Time Password Authenticator: [Empty]
- App Registration: Salesforce Authenticator: [Empty]
- Security Key (OTP or WebAuthn): [Empty]
- Lightning Login: [Empty]
- Temporary Verification Code (Expires in 1 to 24 Hours): [Generate]

Role and Profile:

- Role: Sales Executive
- User License: Salesforce
- Profile: System Administrator

User Settings:

- Active: ☒
- Marketing User: ☐
- Offline User: ☐
- Knowledge User: ☐
- Flow User: ☐
- Service Cloud User: ☐
- Site.com Contributor User: ☐
- Site.com Publisher User: ☐
- WDC User: ☐
- Mobile Push Registrations: ☐
- Data.com User Type: [Empty]
- Accessibility Mode (Classic Only): ☐
- Debug Mode: ☐
- High-Contrast Palette on Charts: ☐
- Load Lightning Pages While Scrolling: ☒
- Send Apex Warning Emails: ☐
- Salesforce CRM Content User: ☒
- Receive Salesforce CRM Content Email Alerts: ☒
- Receive Salesforce CRM Content Alerts as Daily Digest: ☒
- Make Setup My Default Landing Page: ☐
- Quick Access Menu: ☒
- Development Mode: ☐
- Show View State in Development Mode: ☐
- Cache Diagnostics: ☐

Create an Approval Process for Property Object

Quick Find / Search... [Expand All](#) [Collapse All](#)

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- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize

Approval Processes
Property: Property Approval
[Back to Approval Process List](#)

Process Definition Detail

Process Name: Property Approval [Edit](#) [Clone](#) [Deactivate](#) Active ☒

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 Allow Submitters to Recall Approval Requests ☐

Record Editability: Approval Assignment Email Template: Initial Submitters: Property Owner Created By: ClientEstate Hub, 27/10/2024, 6:20 pm Modified By: ClientEstate Hub, 27/10/2024, 6:41 pm

Initial Submission Actions [Add Existing](#) [Add New](#)

Action Type	Description
Record Lock	Lock the record from being edited

Approval Steps [Add Existing](#) [Add New](#)

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Executive Approval	1				User Executive	Final Rejection

Final Approval Actions [Add Existing](#) [Add New](#)

Action Type	Description
Record Lock	Lock the record from being edited

Final Rejection Actions [Add Existing](#) [Add New](#)

Action Type	Description
Record Lock	Unlock the record for editing

Recall Actions [Add Existing](#) [Add New](#)

Action Type	Description
Record Lock	Unlock the record for editing

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salesforce 25 Search... [Switch to Lightning Experience](#) ClientEstate Hub Setup Help [Content](#)

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- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration

Edit Field Update
Verified Property
Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit [Save](#) [Save & New](#) [Cancel](#)

Identification

Name: Verified Property

Unique Name: Verified_Property

Description:

Object: Property

Field to Update: Verified

Field Data Type: Checkbox

Re-evaluate Workflow Rules after Field Change ☐

Specify New Field Value

Checkbox Options

☒ True ☐ False

[Save](#) [Save & New](#) [Cancel](#)

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salesforce

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Mobile Administration

Desktop Administration

Edit Field Update

UnVerified Property

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Save

Save & New

Cancel

Identification

Name

UnVerified Property

Unique Name

UnVerified_Property

Description

Object

Property

Field to Update

Verified

Field Data Type

Checkbox

Re-evaluate Workflow Rules after Field Change

Specify New Field Value

Checkbox Options

True

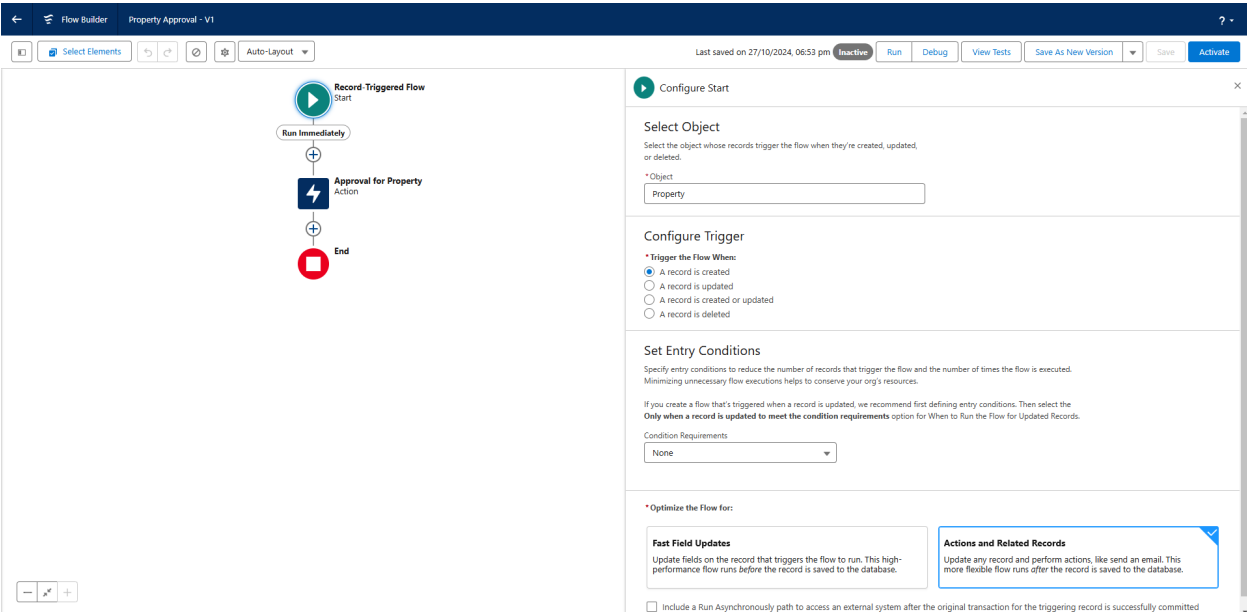
False

Save

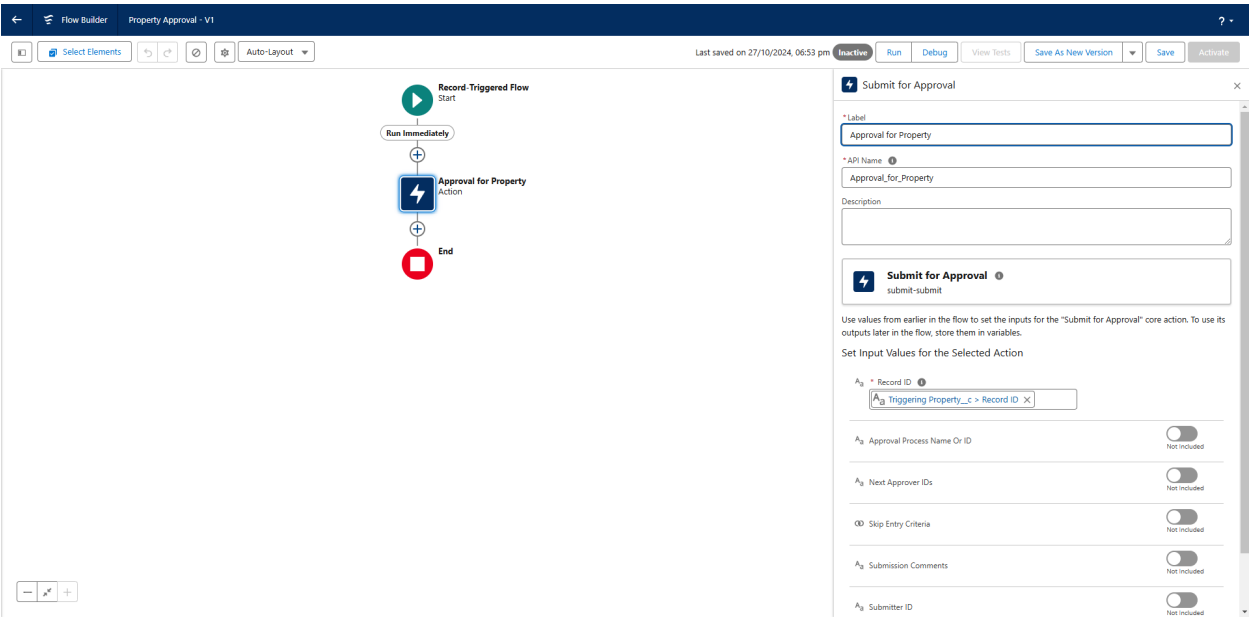
Save & New

Cancel

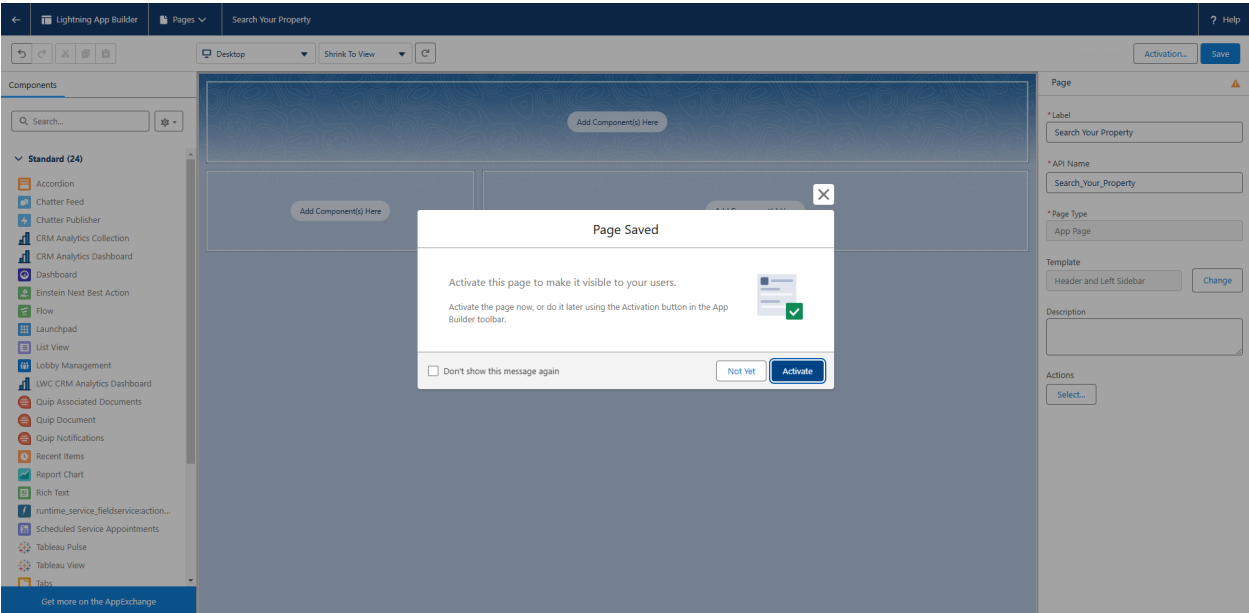
Create a Record trigger flow to submit the Approval Process Automatically



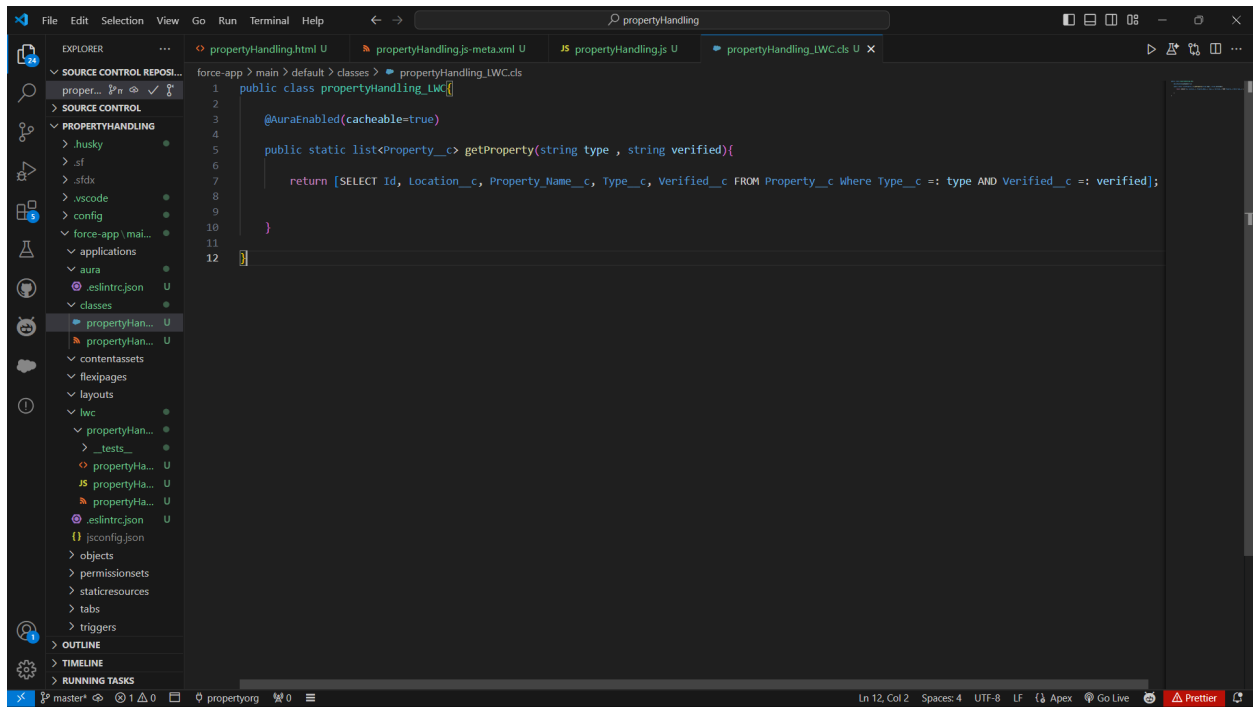
CRM Application to Handle Clients and Their Property-Related



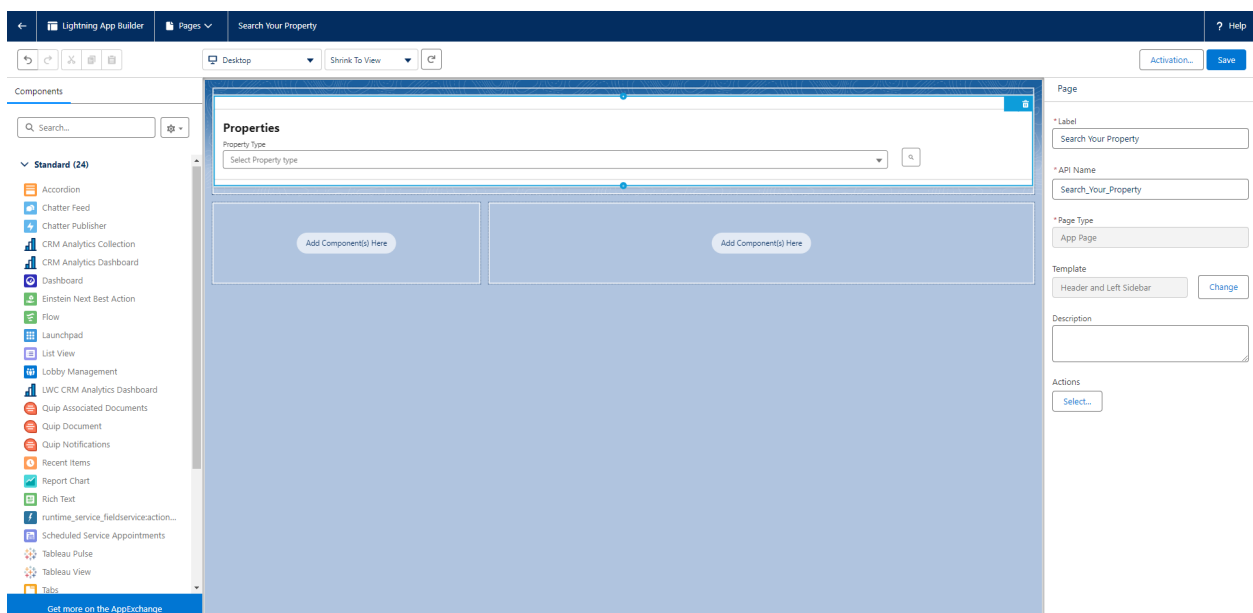
Create an app page



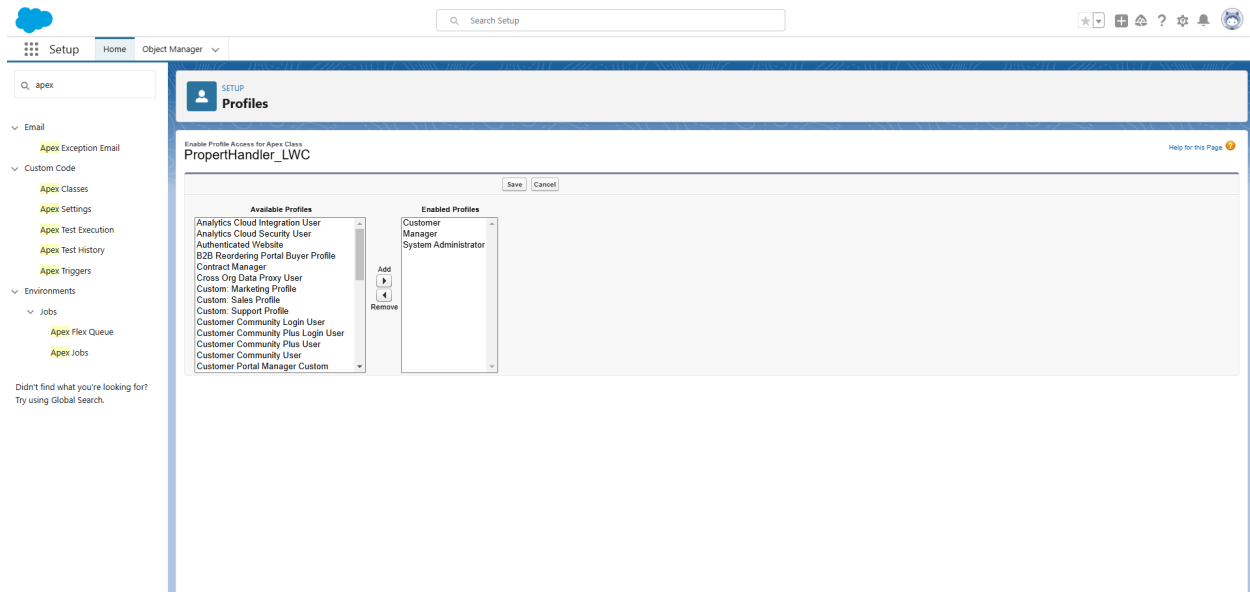
Create a LWC Component



Drag this Component to your App Page



Give Access of Apex Classes to Profiles



4. Detailed Steps to Solution Design

1. Create Objects from Spreadsheet: Structured the database by importing property data using spreadsheets.
2. Integrate Jot form with Salesforce Platform: Automated the customer data entry process through Jot form integration.
3. Create Roles and Profiles: Designed custom roles and profiles to manage user access and permissions.
4. Create Property Details App: Developed a dedicated app to manage and view property listings.
5. Create Approval Process for Property Object: Implemented an approval mechanism for property entries.
6. Create a Record Trigger Flow: Set up triggers to submit property entries for approval when needed.
7. Create and Use Lightning Web Component: Designed a custom component for better data visualization on app pages.

5. Testing and Validation

The project underwent rigorous testing to ensure data accuracy and system reliability:

- Unit Testing: Conducted for Apex Classes and Triggers to verify the integrity of the automation scripts.
- User Interface Testing: Focused on the LWC and app pages to ensure a seamless user experience.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

1. Automated Record Creation: Automatically creating customer records through Jot form submissions, minimizing manual data entry.
2. Property Listing Approval Workflow: Streamlined property approvals to ensure only validated data is published.
3. Role-Based Access Control: Customized roles and profiles to ensure the right users have the appropriate permissions.

7. Conclusion

The "CRM Application to Handle Clients and Their Property-Related Requirements" purchase Salesforce to enhance client and property management in real estate by automating record creation through Jot-form and centralizing data in a dedicated Property Details App. With role-based access control and confirmation-based property visibility, the coating ensures data security while offering a tailored user experience. Engaging end users during testing has resulted in a solution that meets both business needs and user outlook. Overall, this execution significantly streamlines operations, improves data integrity, and enhances customer satisfaction, positioning the organization for future growth and adaptability