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 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.

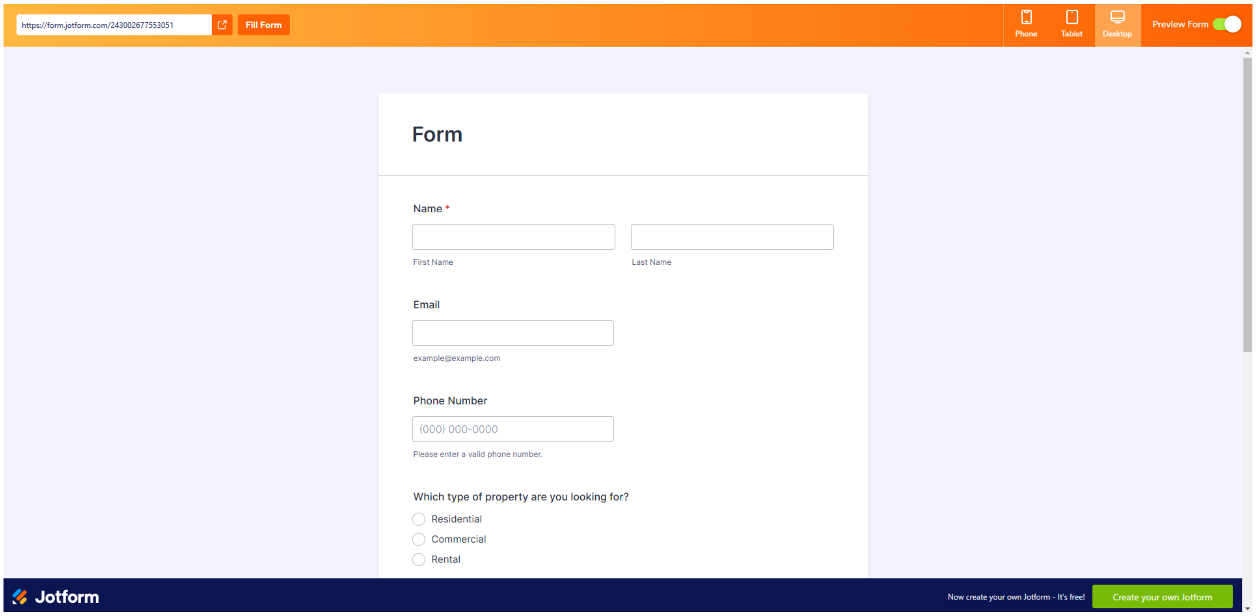
3. Approval Process: Automated the property approval process to facilitate quick decision-making.

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.

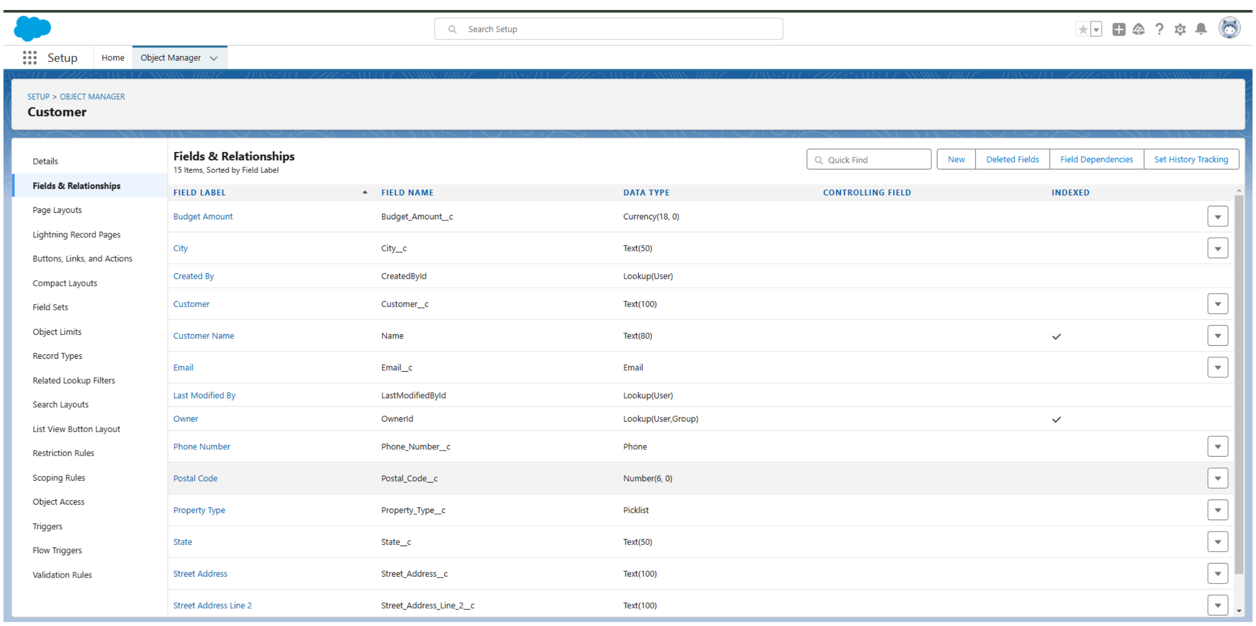
5. Lightning Web Component (LWC): Enhanced user interface by providing custom components and improved user interaction.

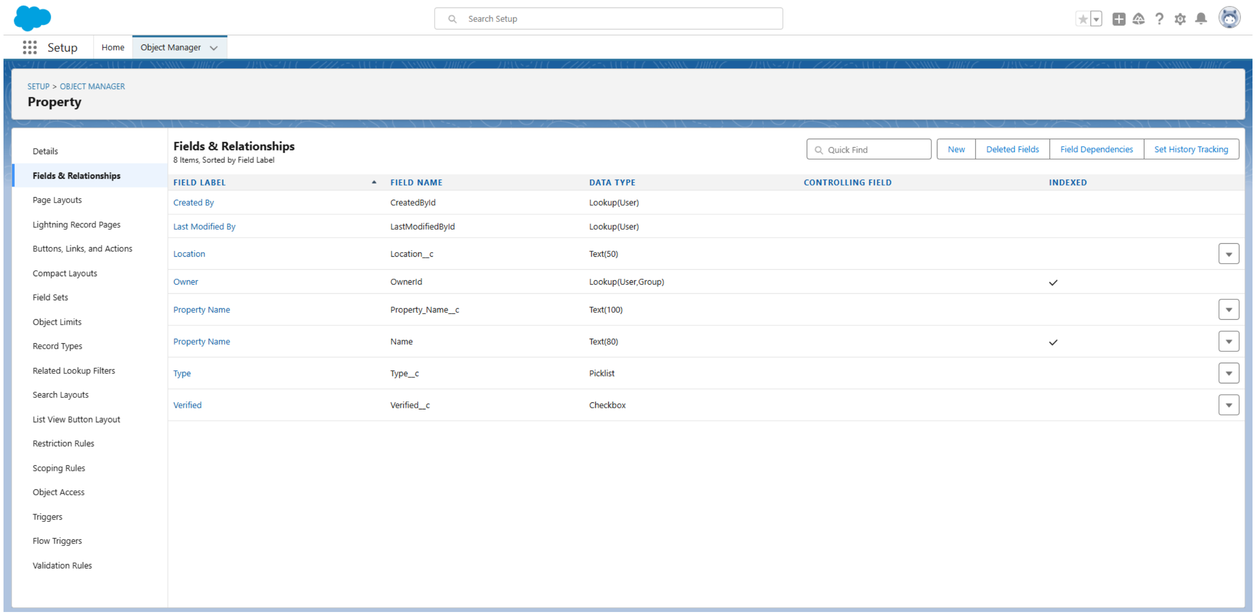
6.Property Details App : Built a consecrate Property Details App to centralize all property-related data, simplify property management, and ensure all property entropy is accessible within a single coating.

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

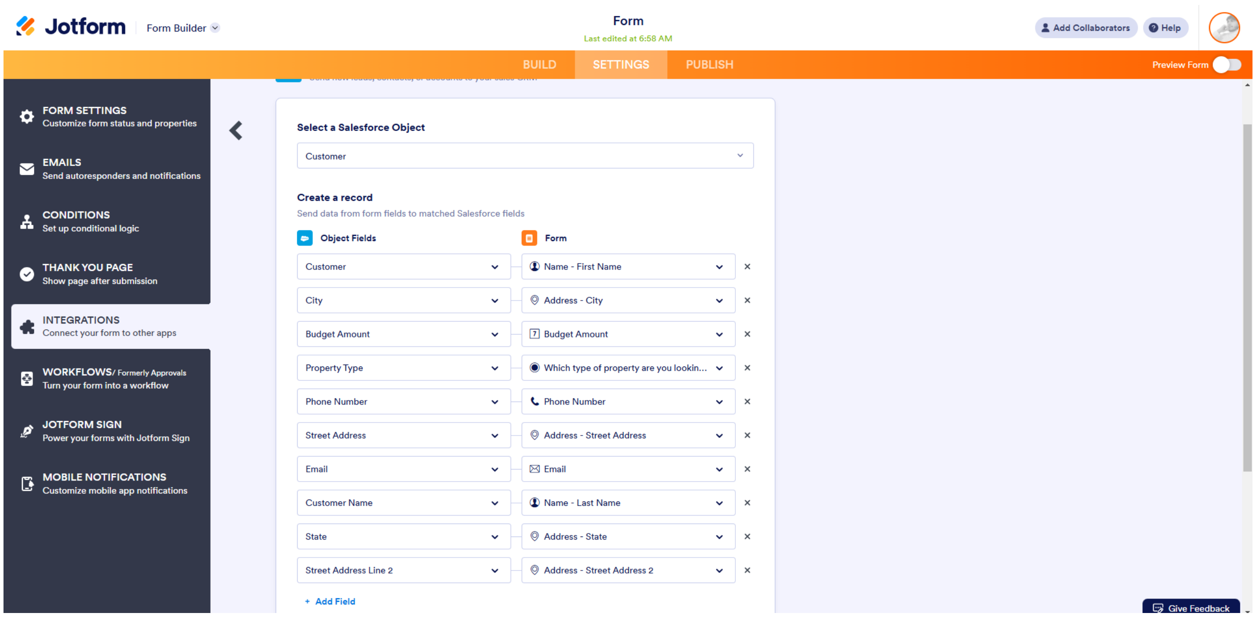


Create Objects from Spreadsheet

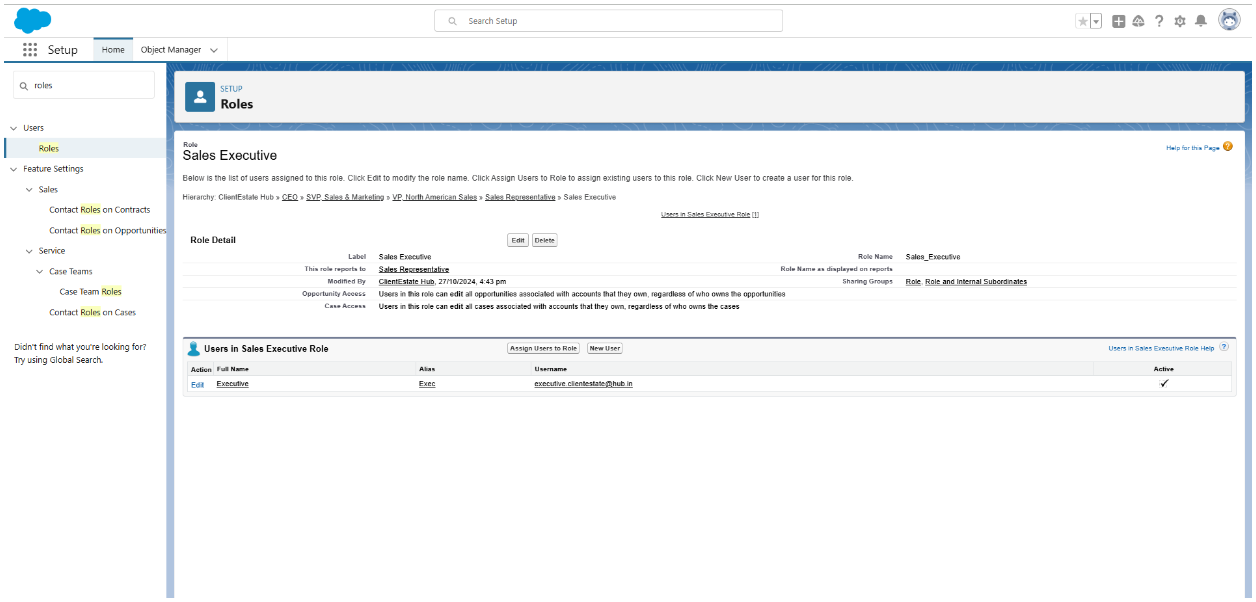


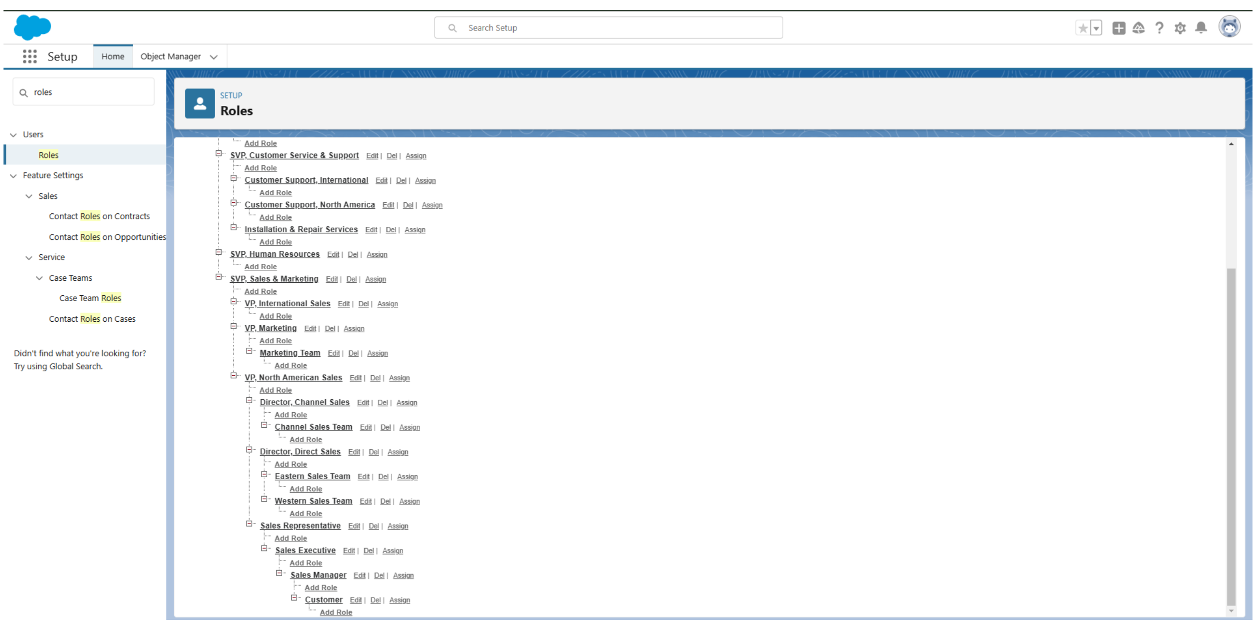


Integrate Jot form with Salesforce Platform

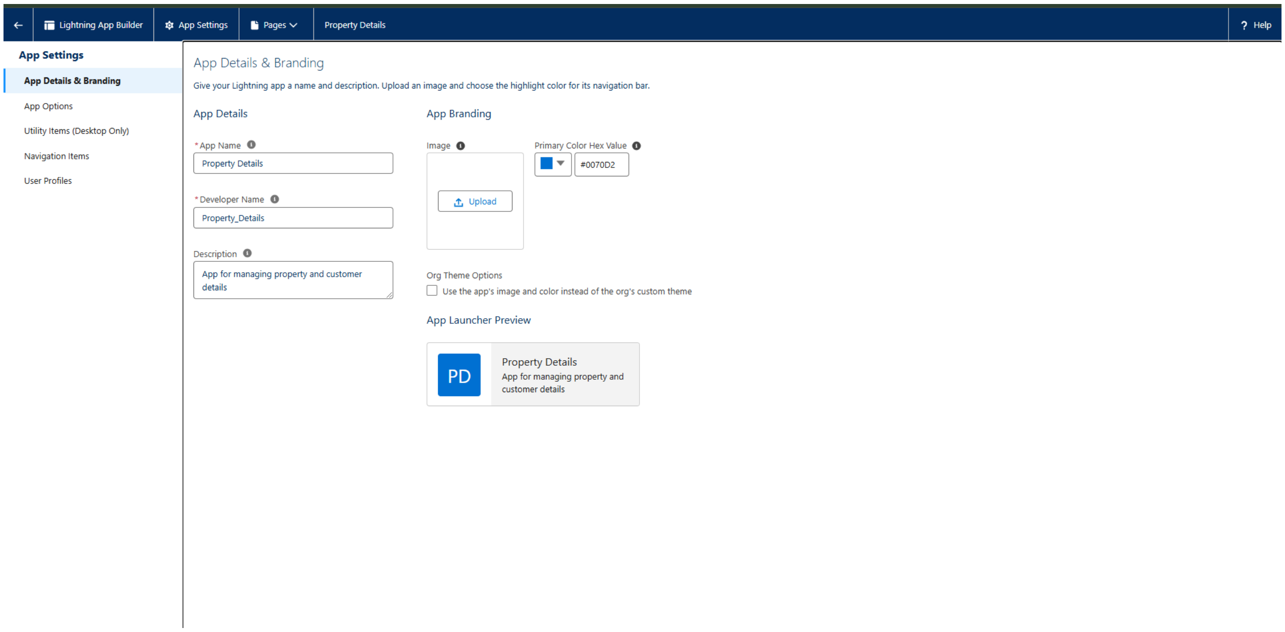


Create Roles

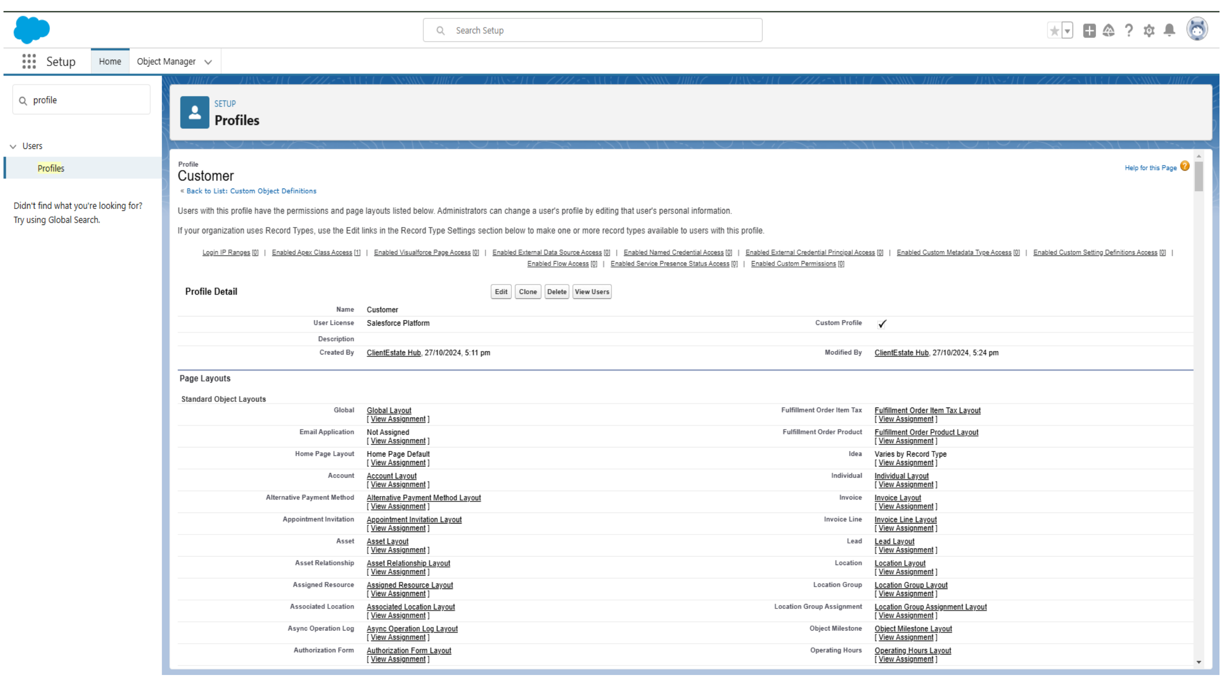


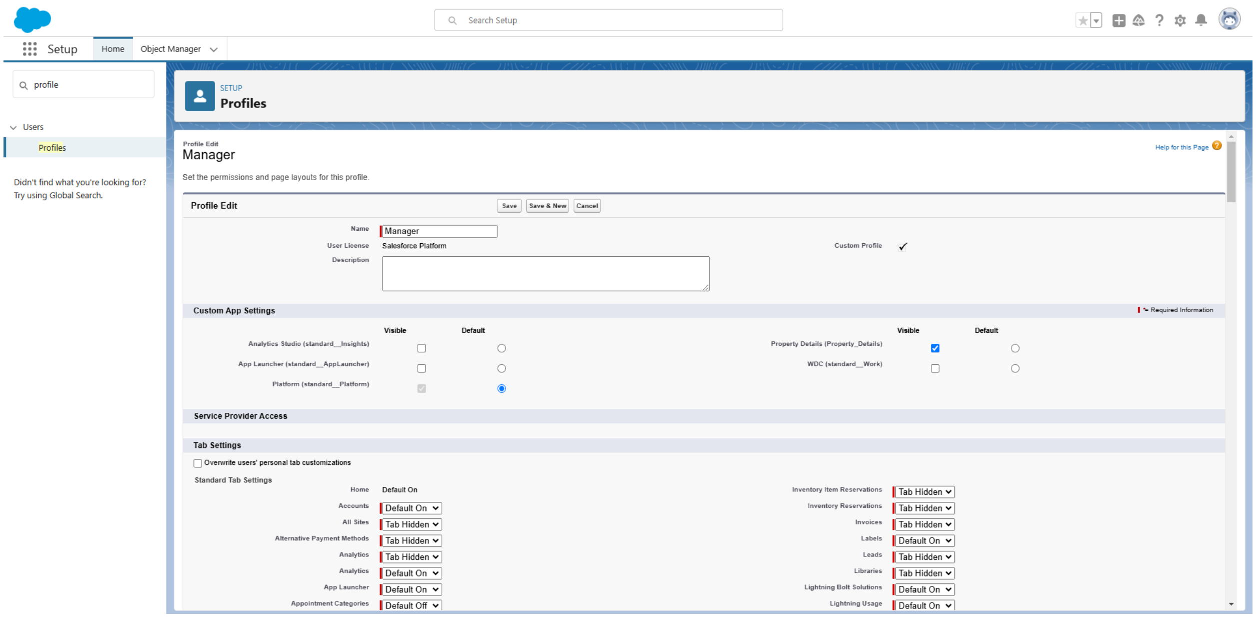


Create a Property Details App

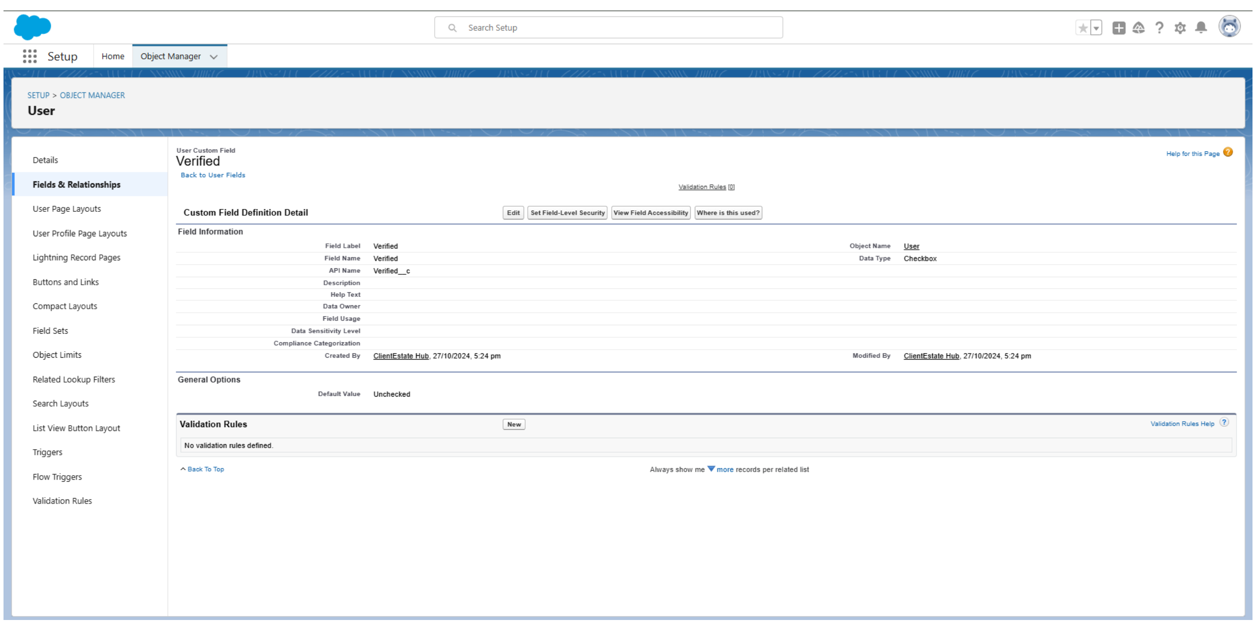


Create Profile

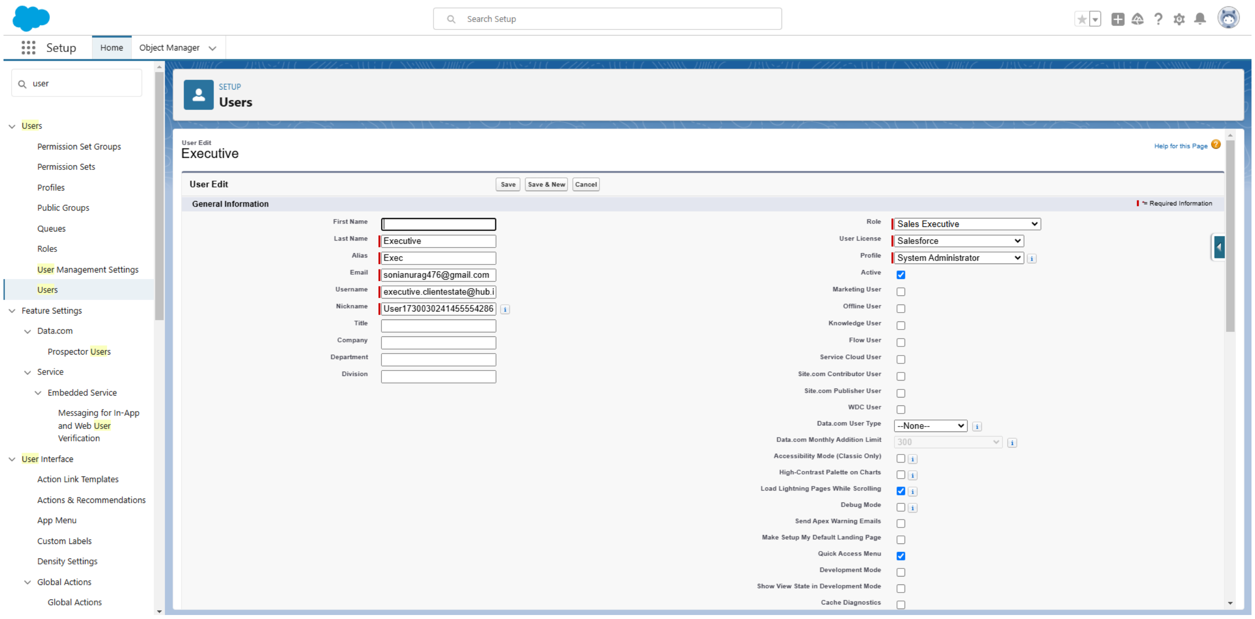


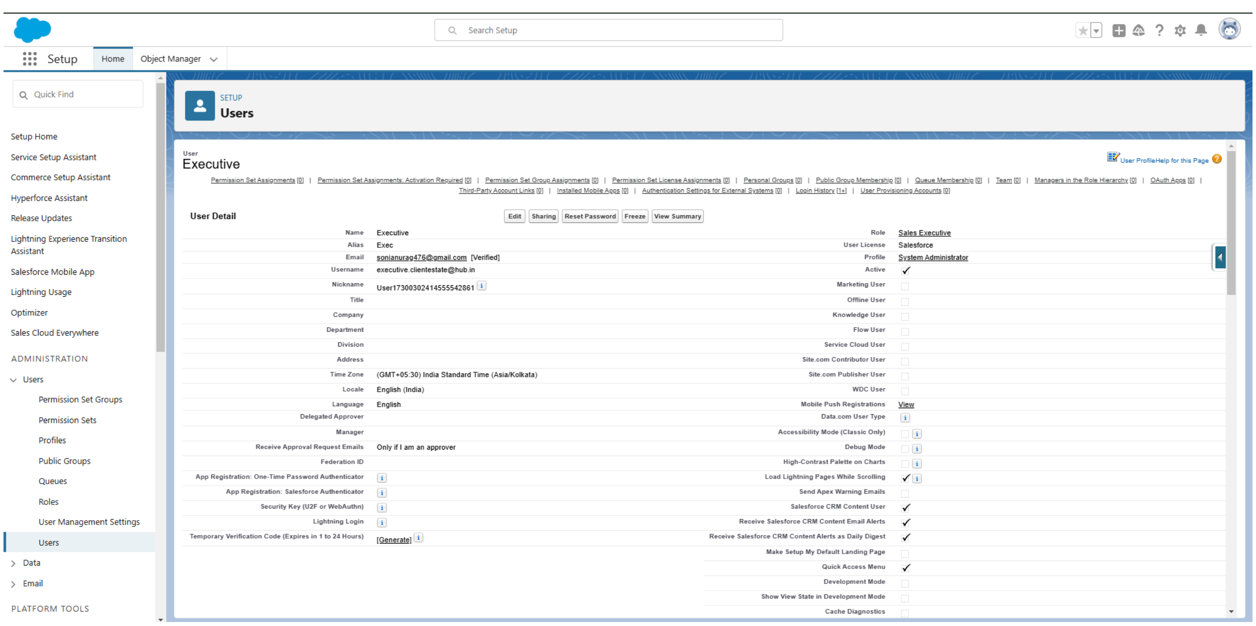


Create a Check Box field on user

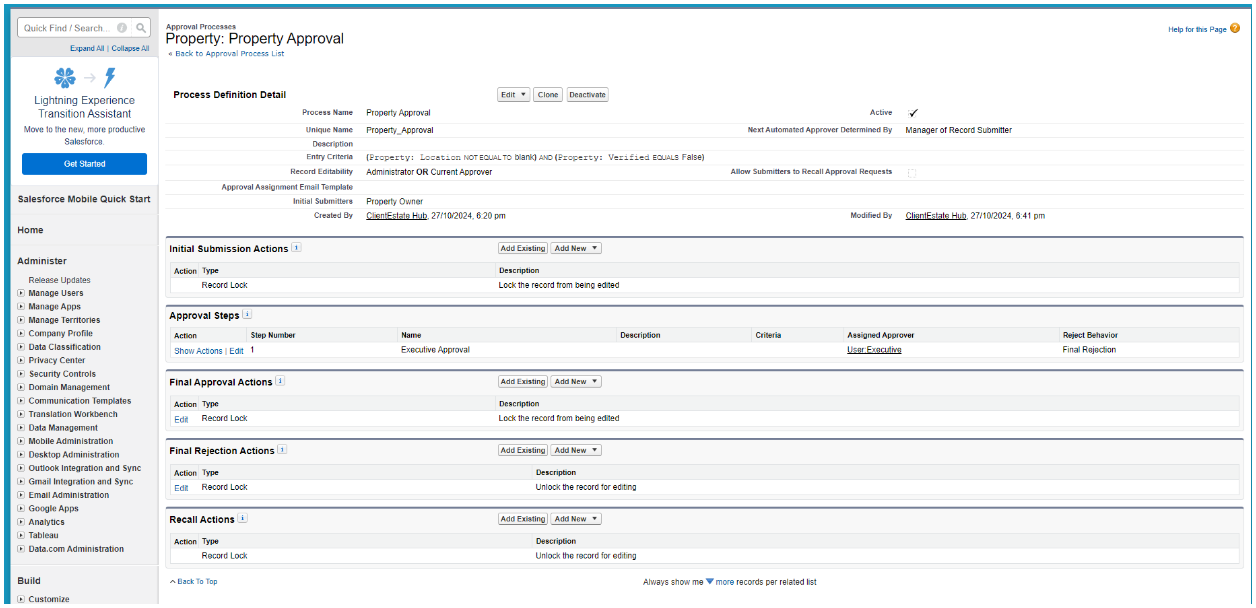


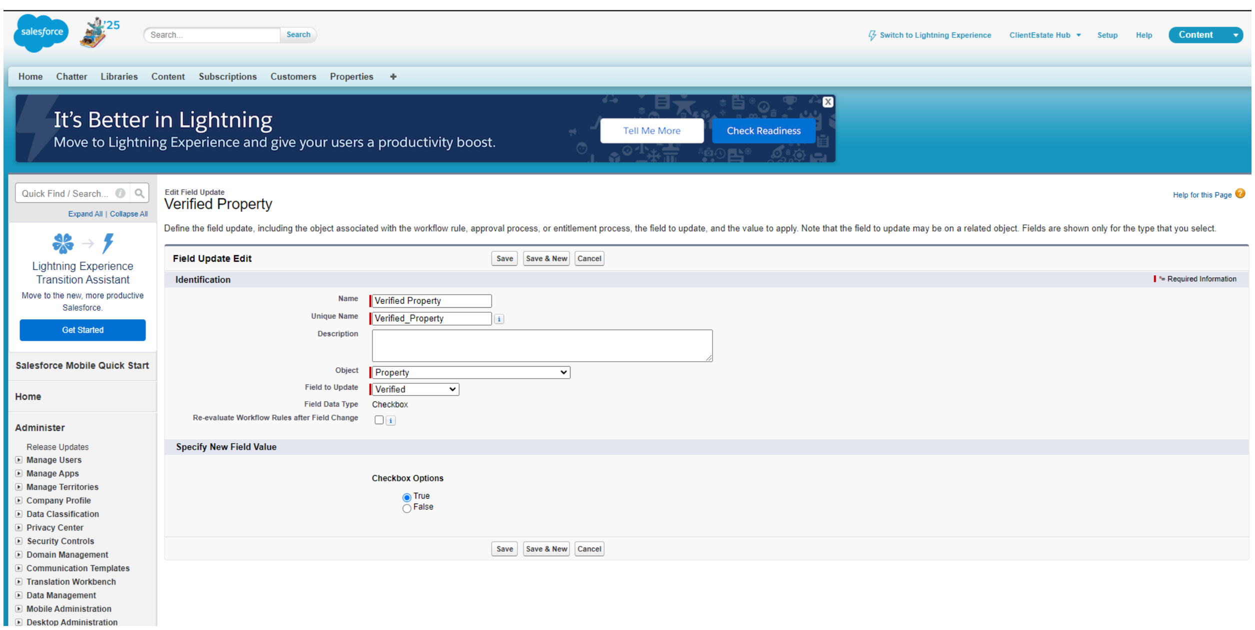
Create Users

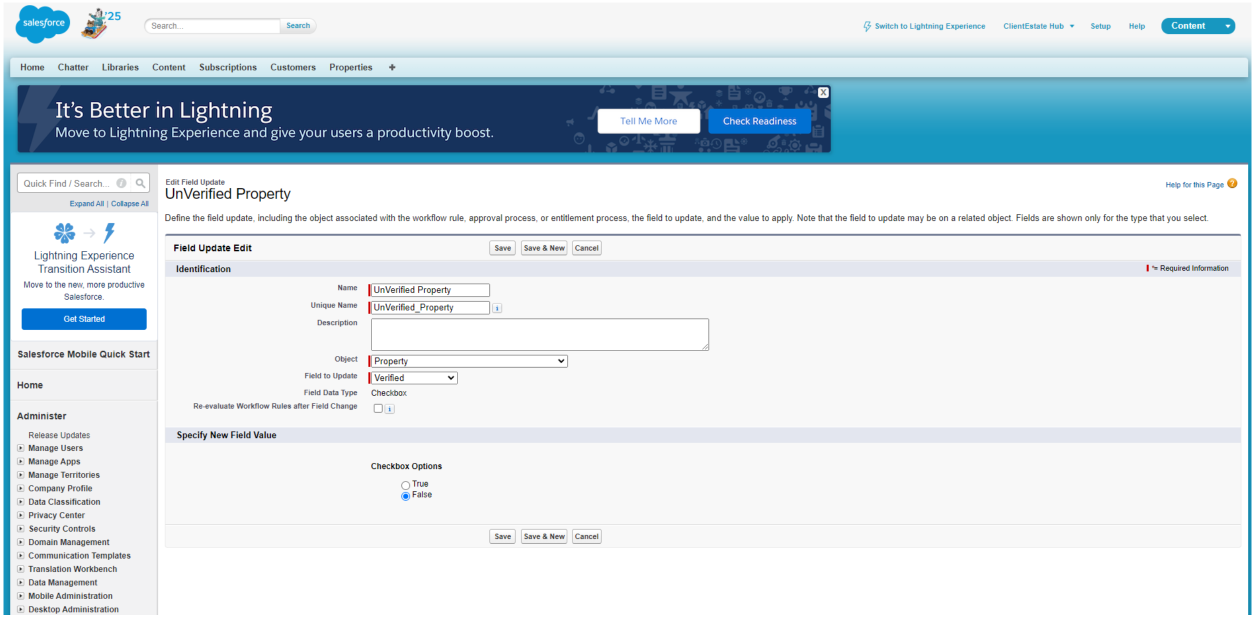




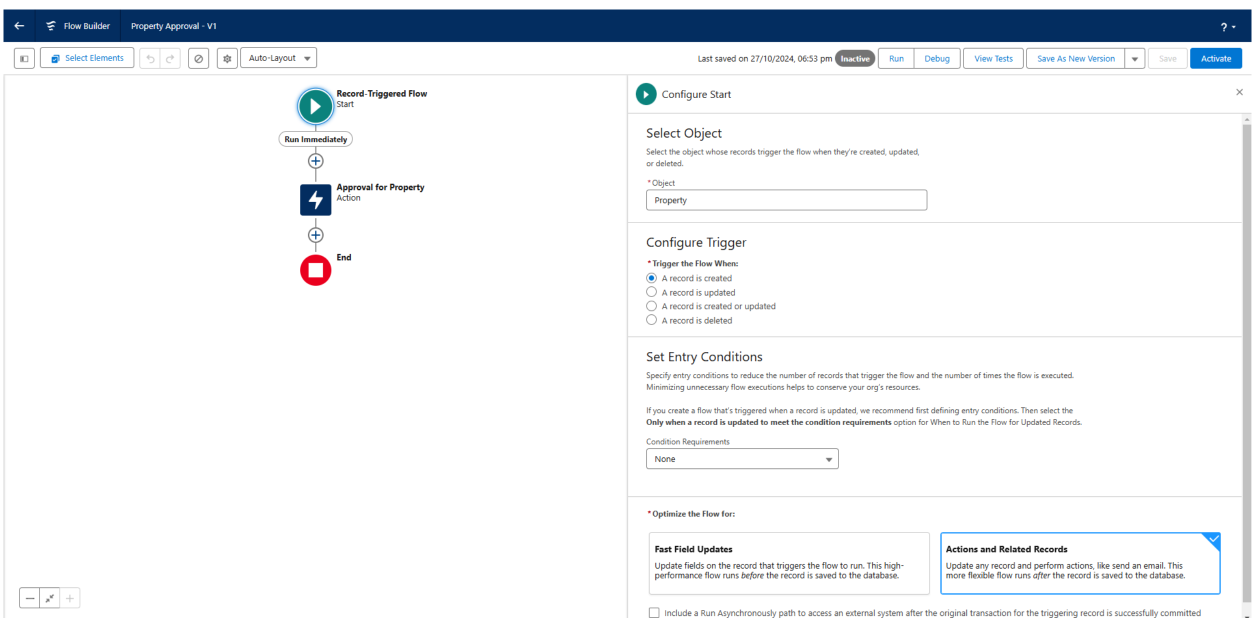
Create an Approval Process for Property Object

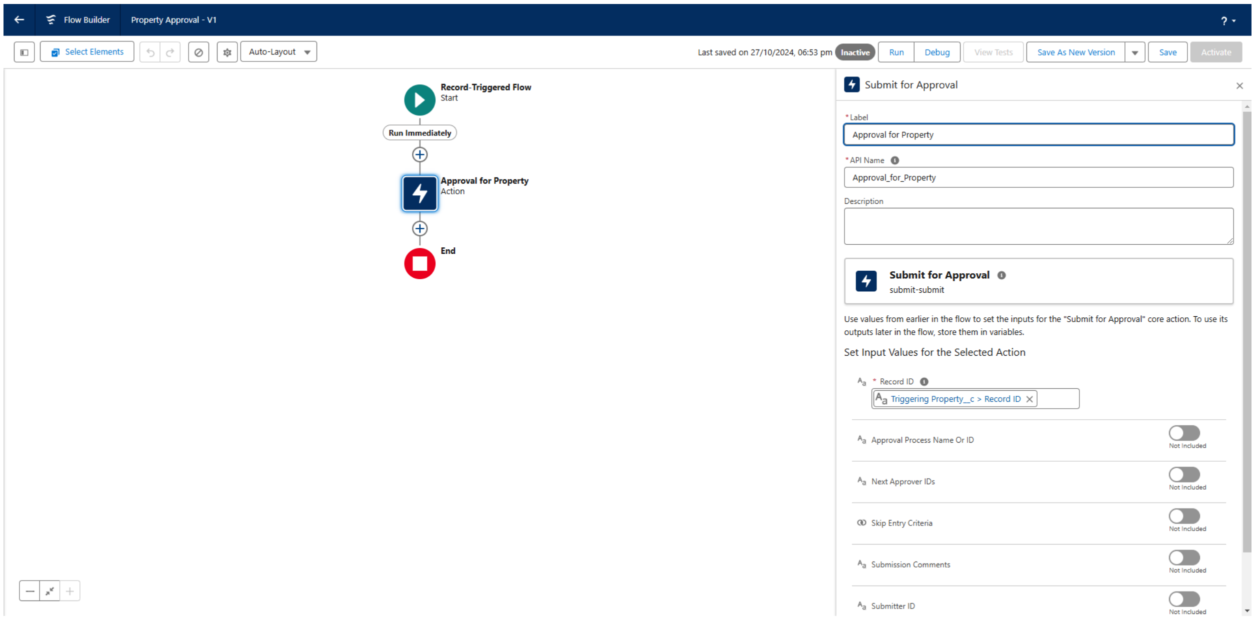




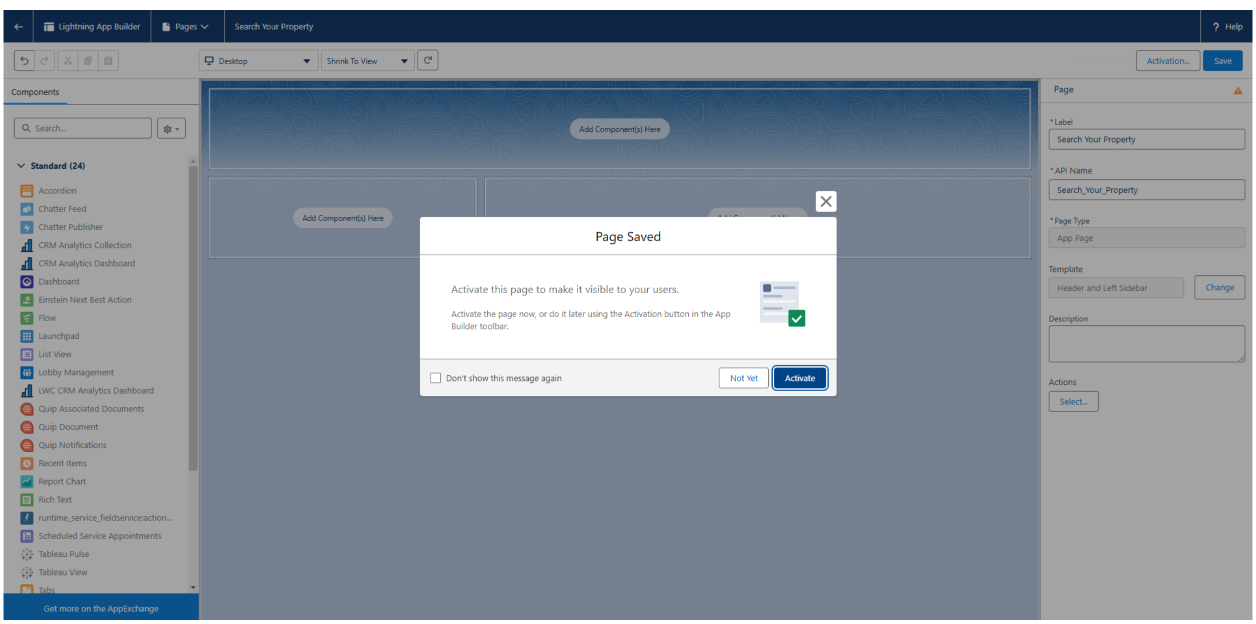


Create a Record trigger flow to submit the Approval Process Automatically

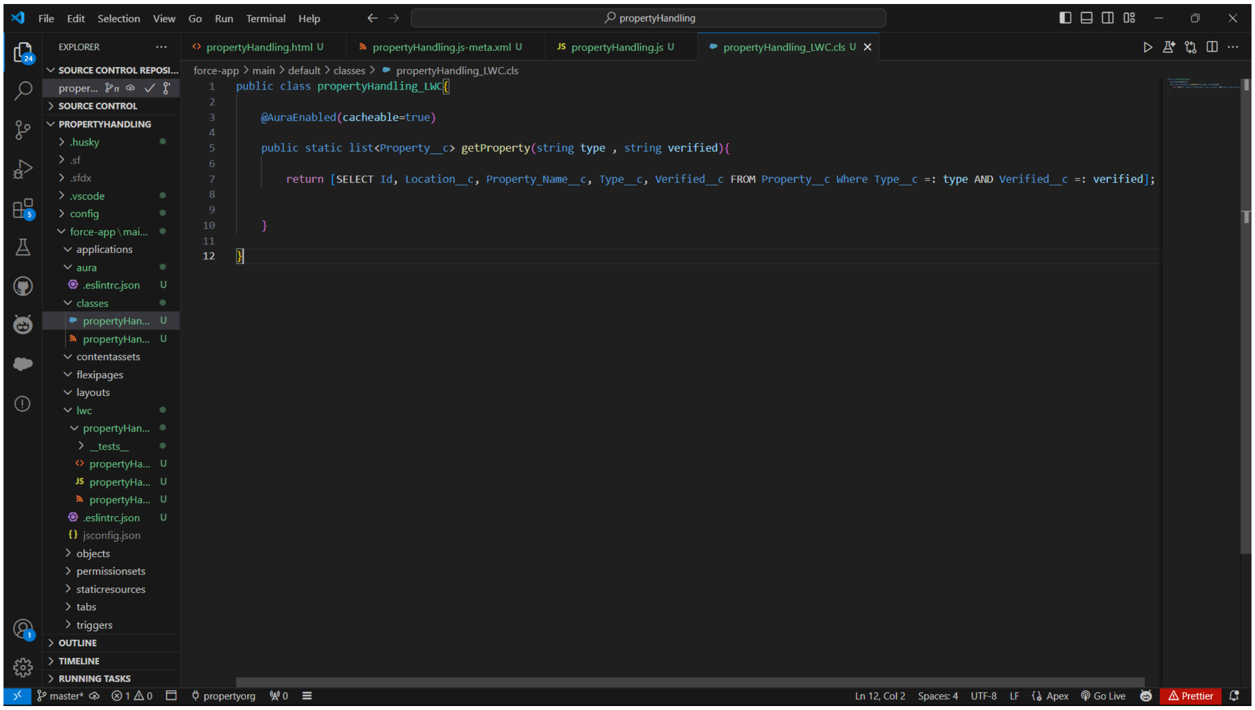




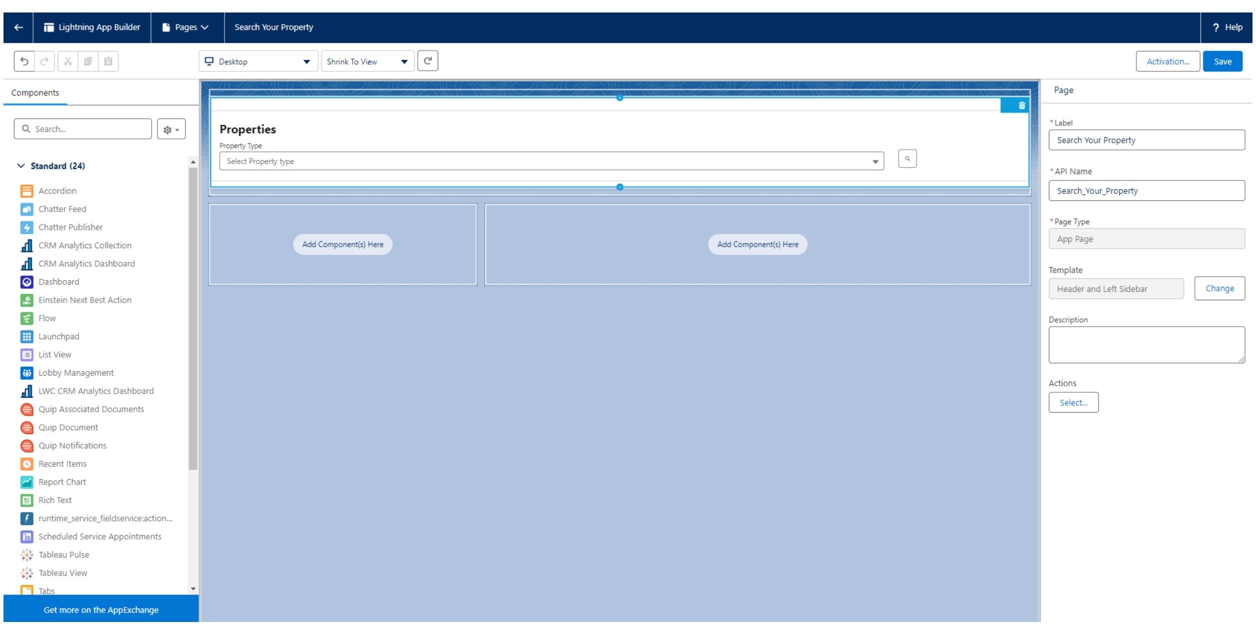
Create an app page



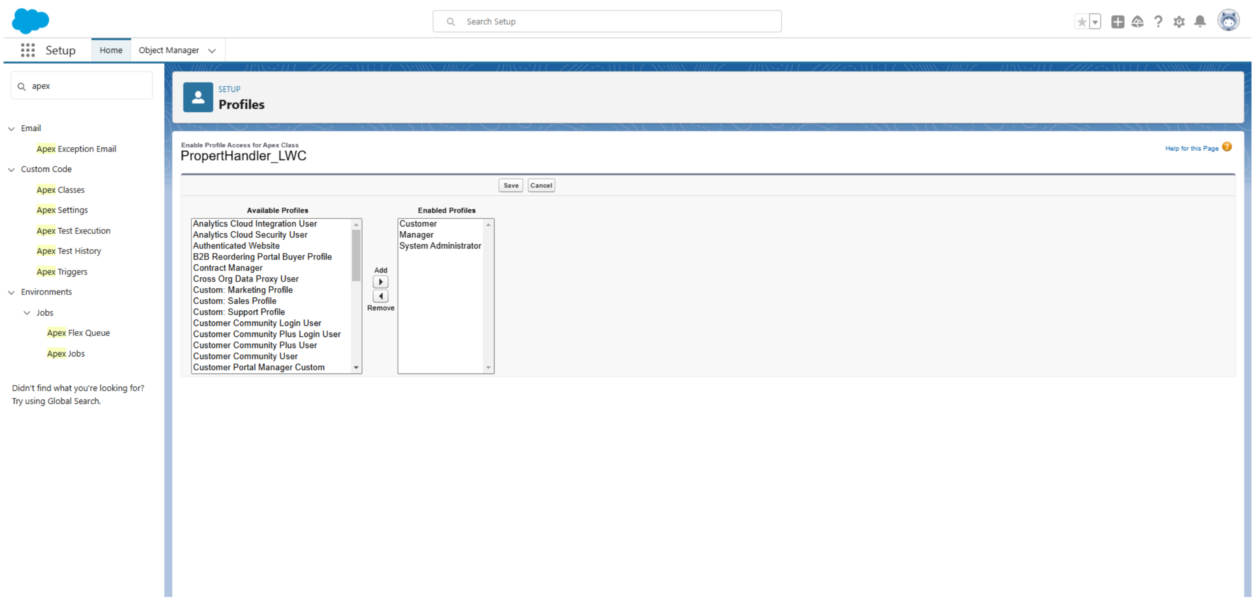
Create a LWC Component



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