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

Project Description:

Dreams World Properties integrates Salesforce to streamline customer interactions. Website engagement triggers automated record creation in Salesforce, capturing customer details and preferences. Salesforce categorizes users as approved or non-approved, offering tailored property selections to approved users. This enhances user experience and efficiency, providing personalized recommendations and broader listings.Seamless integration optimizesoperations, improving customer engagement and facilitating growth in the real estate market.

1. Client Management
    a. Add,update, and delete client details.
    b. Trackclient preferences, budget, and location interests.
    c. Maintain contact details and communication history.

2. Property Management
    a. Manage property listings with details like type, price, location, and features.
    b. Trackproperties available for sale, rent, or lease.
    c. Upload photos and documents for properties.

3. Requirement Matching
    a. Match client requirements with available properties using filters.
    b. Notify clients about new properties that fit their criteria.

4. Lead Tracking
    a. Manage inquiries and follow upwith potential clients.
    b. Schedulemeetings and site visits.
    c. Assign leads to specific team members.

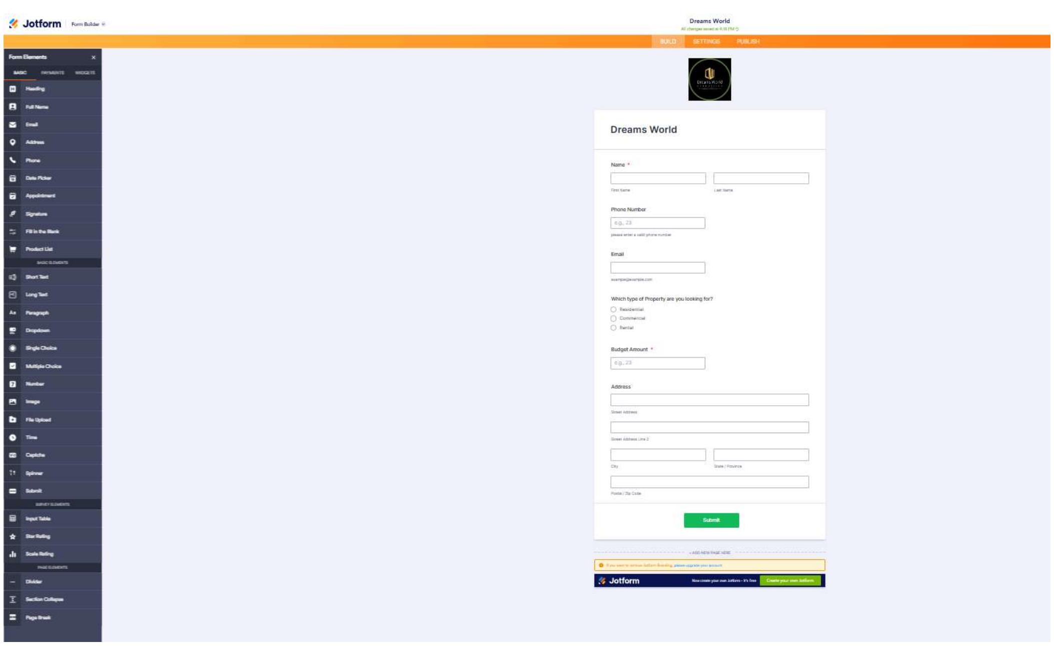
Milestone 1: Create a Jotform and integrate it with theorg to create a record of customers automatically.

Client wants a form for the customers to get the details directly into the salesforce so that the admins can create a user in the org.Client wants a form for the customers to get the details directly into the salesforce so that the admins can create a user in the org.

Activity1

Open your browser and search for jotform and log in.

1. After login click on create form andclick on start from scratch
2. Now create a form to get the customer details like Name, Phone,Email, Address andtype of property the customer is interested in.
3. Once the form is created, publish it by clicking on publish.
4. form link :-https://form.jotform.com/243219157995064



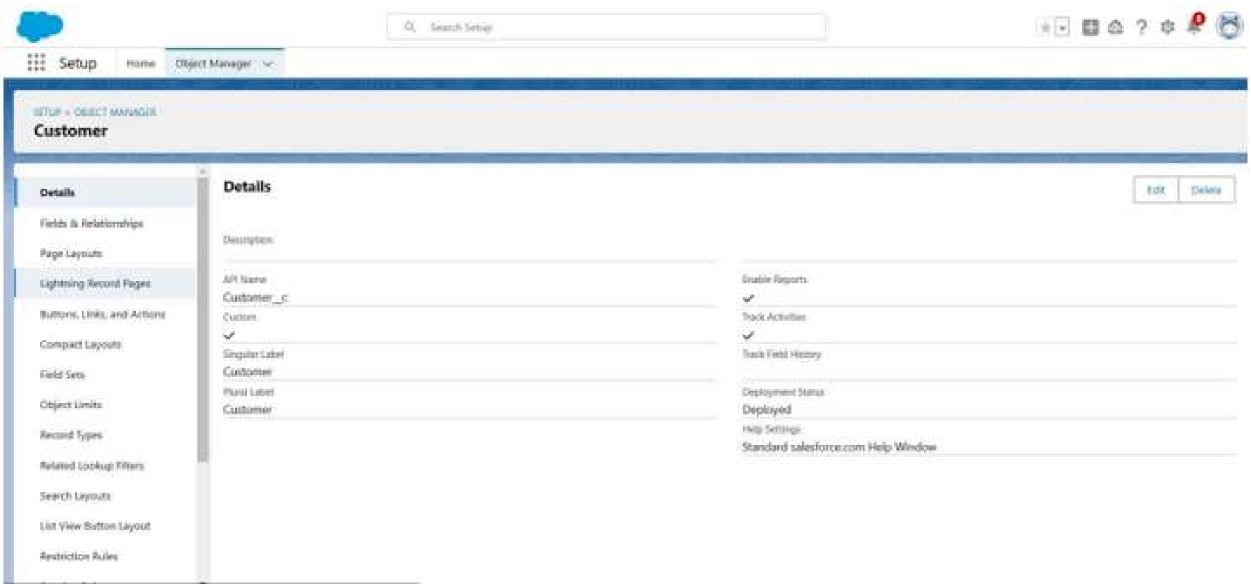
Create Objects from Spreadsheet

Directly Creating Objects from Spreadsheet in Salesforce

Creating Customer Object :

1. Go to your object manager and and click oncreate object from spreadsheet.
2. Click on the link to get the spreadsheet
3. [customer]()
4. After downloading, upload the file, map the fields and upload to create an object.

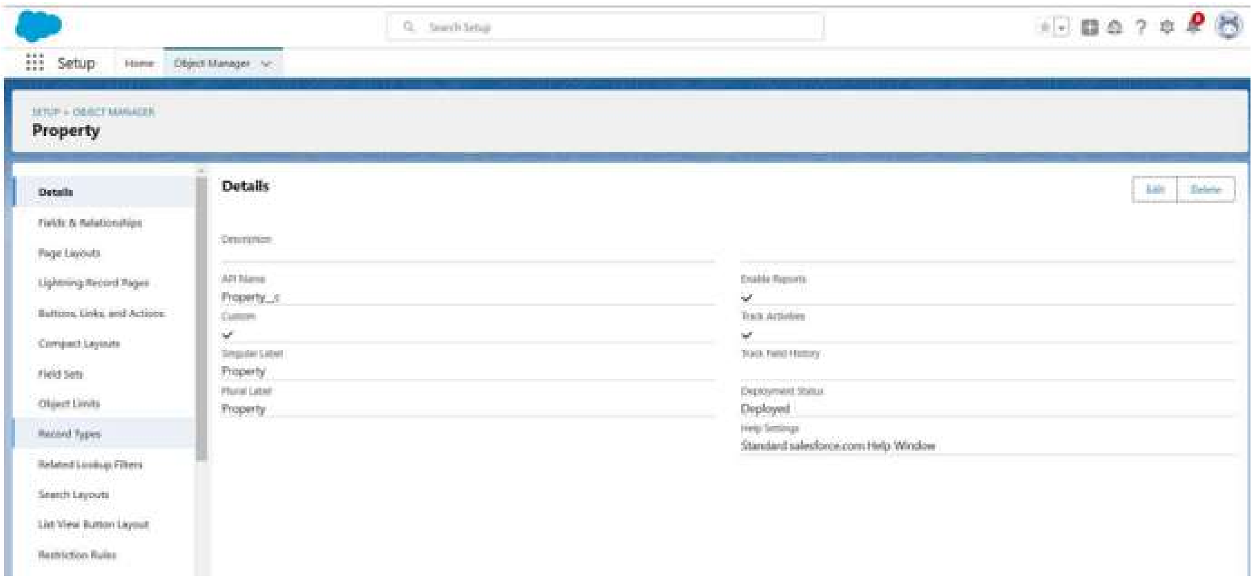
Customer	Phone Number	Emial	State	Property Type	Budget Amount	Street Address	Street Address	City	postal code	Verified
Rakesh	788797	rakesh@gmail.	Telangana	Residential	4000000	gb road	street no 45	Hyderabad	555001	checked
prakash	55448855	p@gmail.com	Maharashtra	Commercial	8000000	gachibowli	indira road	mumbai	6600014	unchecked
Prajwal	454545	prajwal@gmail.	Maharashtra	Rental	25000	kamdli	kathora	Amravati	444805	checked



Creating Property Object :

1. Follow the same from the customer object tocreate theProperty Object
2. Property
3. After downloading, upload the file, map the fields and upload to create an object. the filedsas follows

A	B	C	D
Property Name	Type	Location	Verified
Lotus Appartme	Residential	hydeerabad	checked
500000 sq.ft pl	Commercial	Amravati	uchecked
3 Bhk fkat at st	rental	Jubliee hill Hyd	Checked



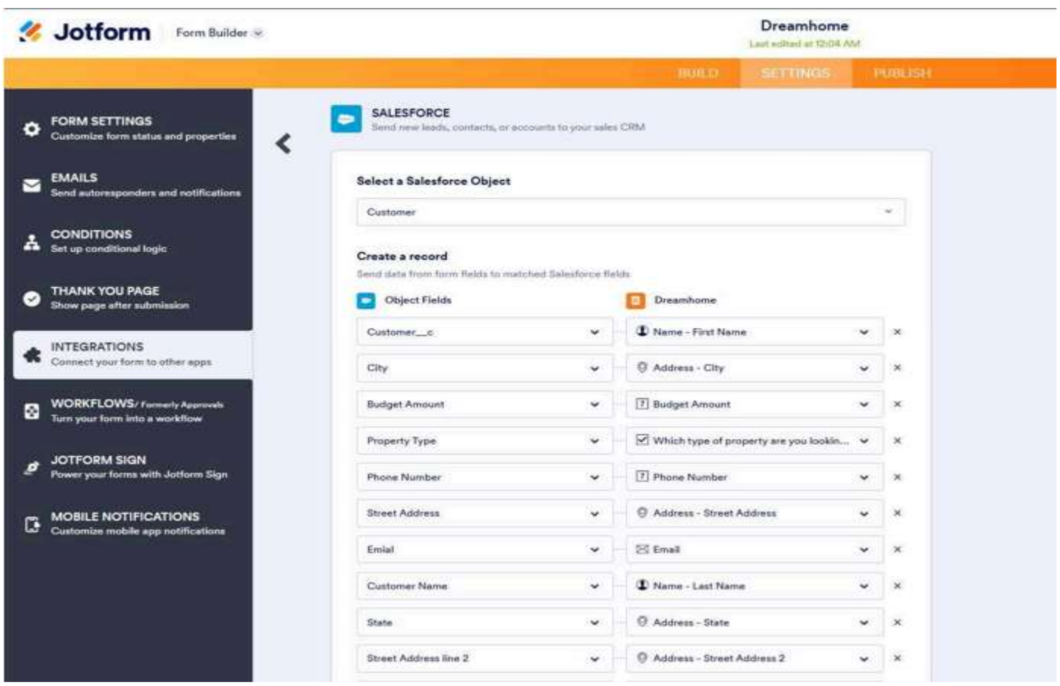
Integrate Jotformwith Salesforce Platform

In this Milestone we are going to integratejotform with Salesforce

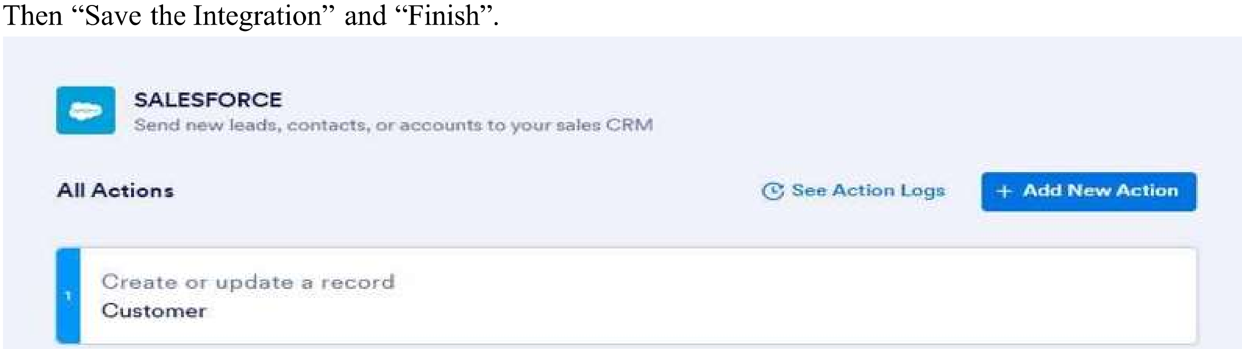
Activity

1. On the Jotform Platform, Click on Integration and choose Salesforce
2. Click on User Integration and choose "Add to From"
3. Select the Org with which you want to Integrate your jotform with and select your account
4. Select an Action -Create a record.
5. Select a Salesforce Object : - Customer

Map Each and every field on the Object with the fields on the form and "Save Action".



Then "Save the Integration" and "Finish".

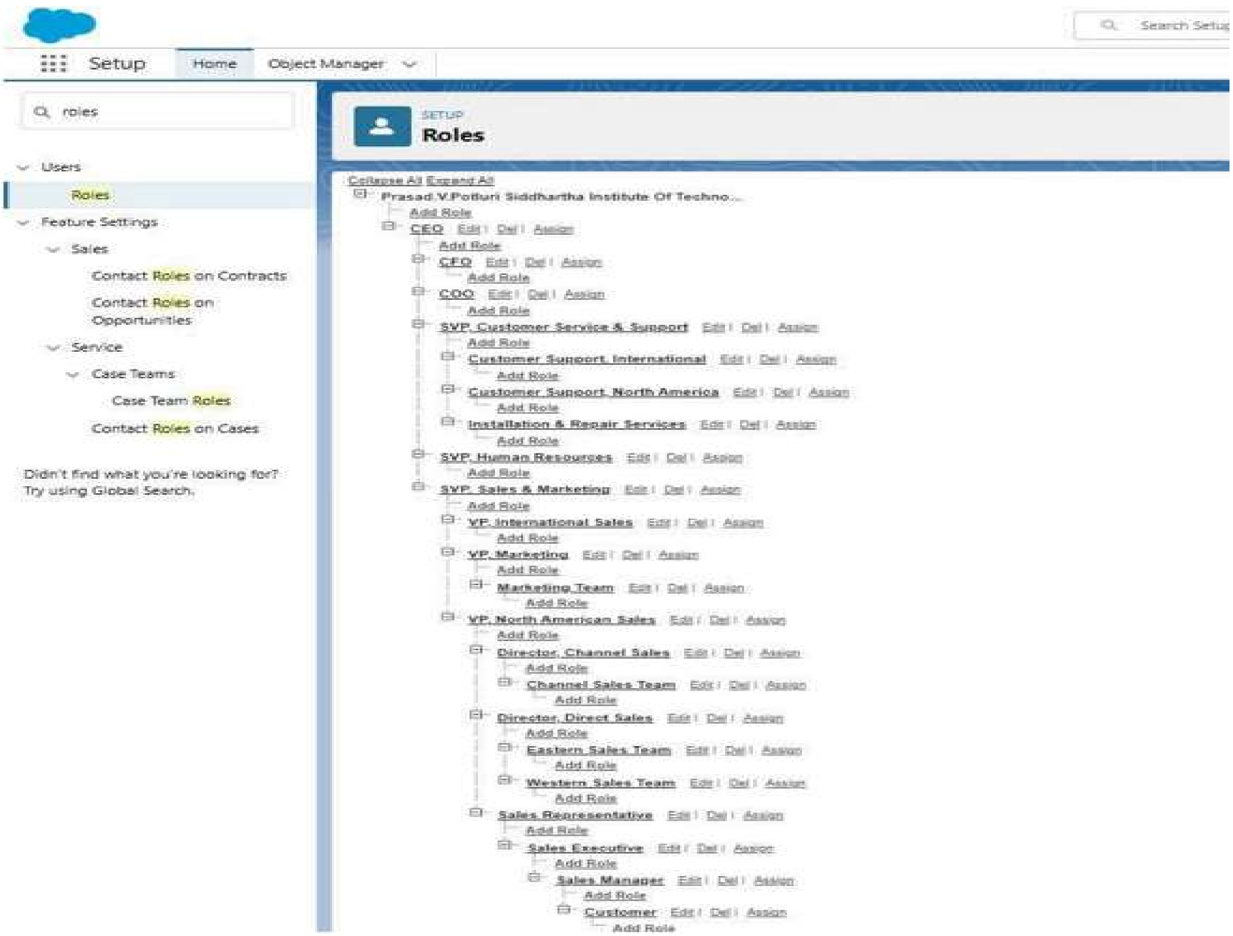


Create Roles

here we need to Create Roles as per business requirenment

Activity:- 1

1. if wedon't find sales representative we need to create itaccording to theneed
2. It willuse the "System Administrator Profile".
3. Label -Sales Executive
4. Reports to- Sales Representative



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.

Create a Property Details App

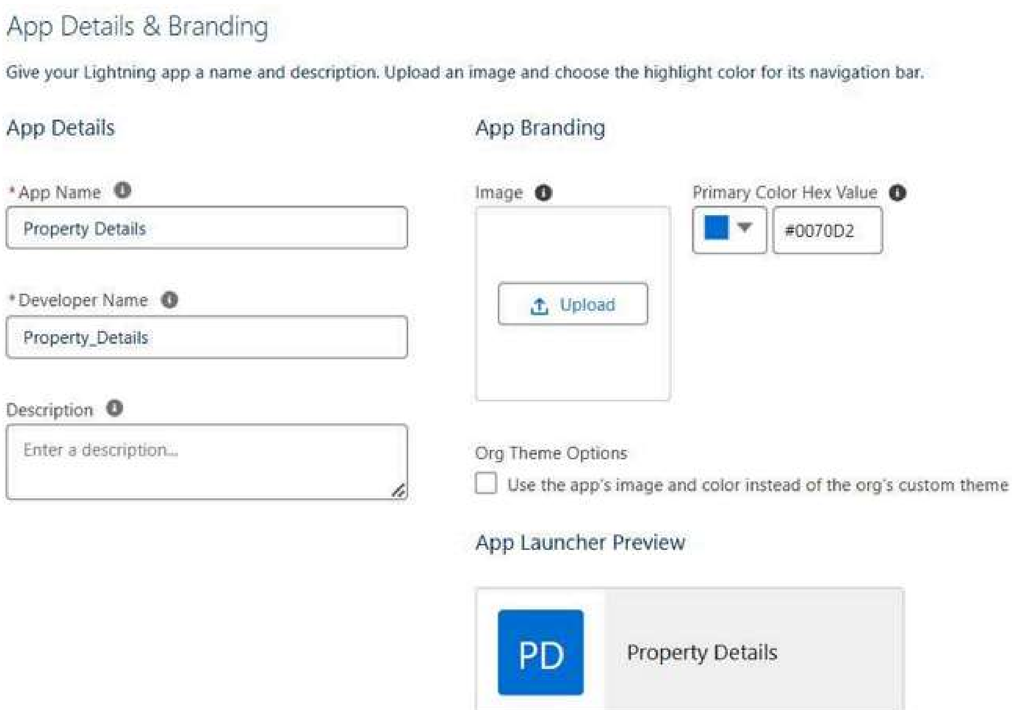
An App where the objectswill be displayed

Activity1

1. From Setup>» Go to AppManager and click on New Lightning App and Nameit as "Property Details" and add "Customer" and "Property" Object.
2. Click Next >» Next >» Save and Add "System Admin "Profile.

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

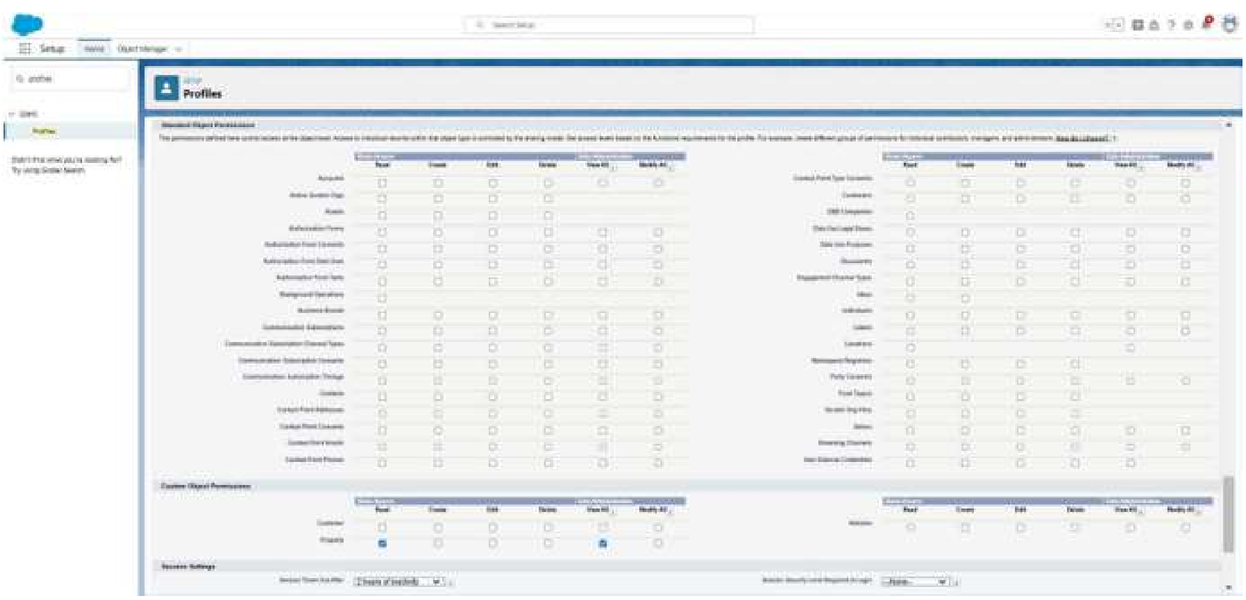


Create Profiles

Create profiles as per business requirement

Creating Customer Profiles

1. From Setup? Go to Profiles and Clone (standard pIatform)SaIesforce Platform User and Name it “Customer”..
2. Uncheck allthe Custom Objects and Check onlyProperty Details From Custom App Settings.
3. so RemovealltheStandard Object Permissions
4. Uncheck all the Custom Object Permissions and check read and view all in “Property”
5. make sure every submissionobject permissions are unselected and then save



Creating ManagerProfiles :-

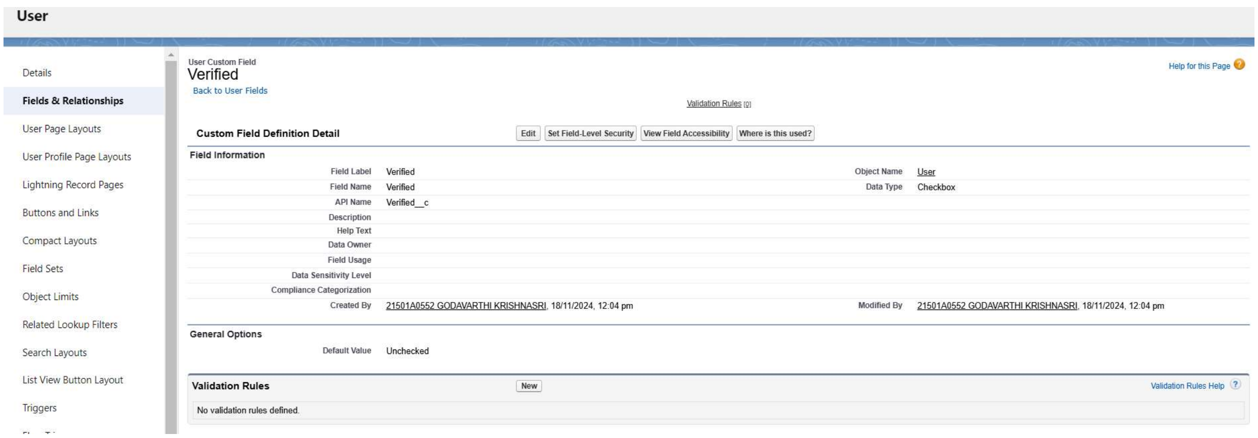
1. From Setup » Go to Profiles andClone Salesforce Platform User and Name it "Manager".
2. Uncheck allthe Custom Objects and Check onlyProperty Details From Custom App Settings.
3. Also Remove all the Standard Object Permissions.
4. Uncheck allthe Custom ObjectPermissions and check only"modify all" from "Property" and"Customer".

Create a CheckBox field on user

Create Field on the User as per the businessrequirement.

Activity:- 1

1. Setup >> Object Manager >> Search for User >> Fields and Relationships
2. select the Data type “Check Box”
3. Create new Field Named as “Verified”

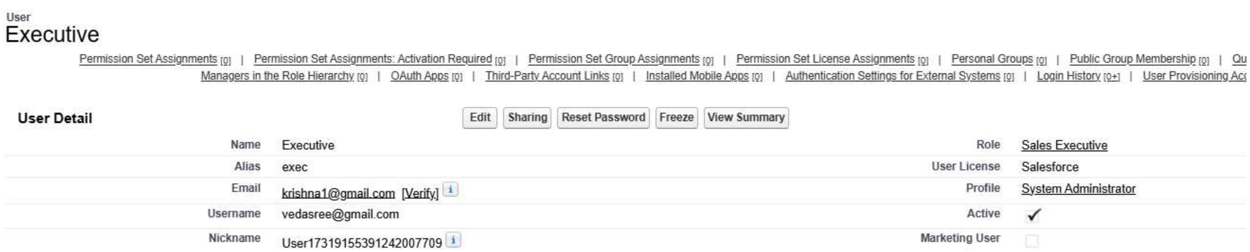


Create Users

Create three differentusers with three different Roles and profilesas we have mentioned above. here we are going to create 4 users

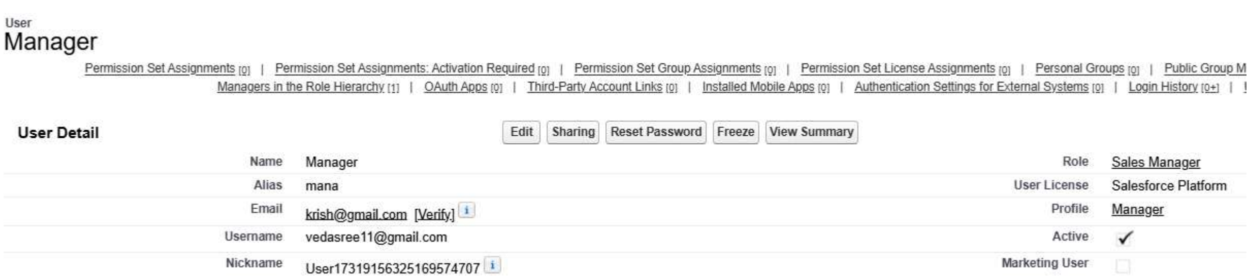
User : 1

1. Goto Setup --> Administration --› Users --> New User
2. Last Name - Executive
3. Role - Sales Executive
4. License - Salesforce
5. Profile - System Administrator
6. Save



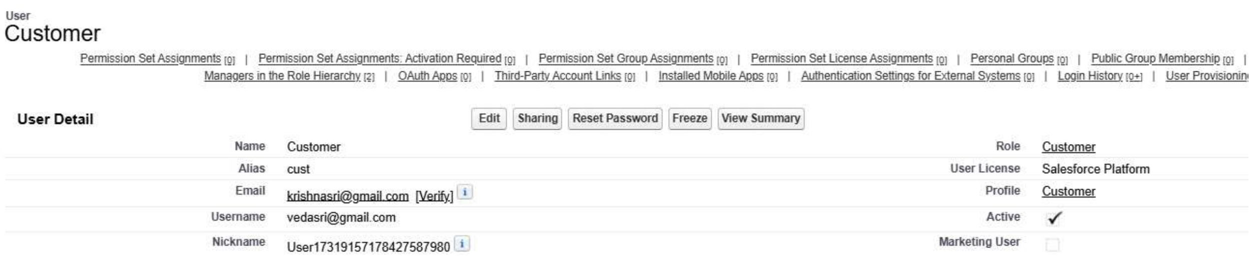
User : 2

1. Goto Setup > Administration >› Users ›>New User
2. Last Name >> Manager
3. Role >> Sales Manager
4. License >> Salesforce Platform
5. Profile >> Manager
6. Save



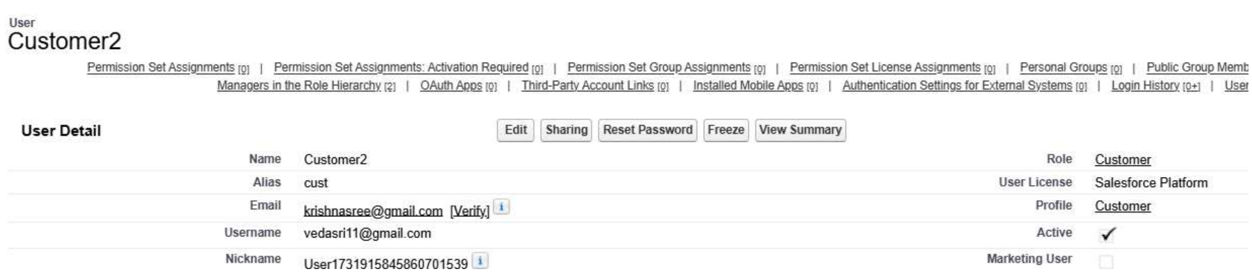
User : 3

1. Go to Setup»>Administration »> Users »> New User
2. Last Name » Customer
3. Role >> Customer
4. License»>Salesforce Platform
5. Profile»>Customer
6. Make Sure the verifiedcheckboxis"Unchecked"
7. Save



User : 4

1. Goto Setup »> Administration >> Users >> New User
2. Last Name >> Customer2
3. Role >» Customer
4. License >> Salesforce Platform
5. Profile »> Customer
6. Make Sure the verified check box is "checked"
7. Save

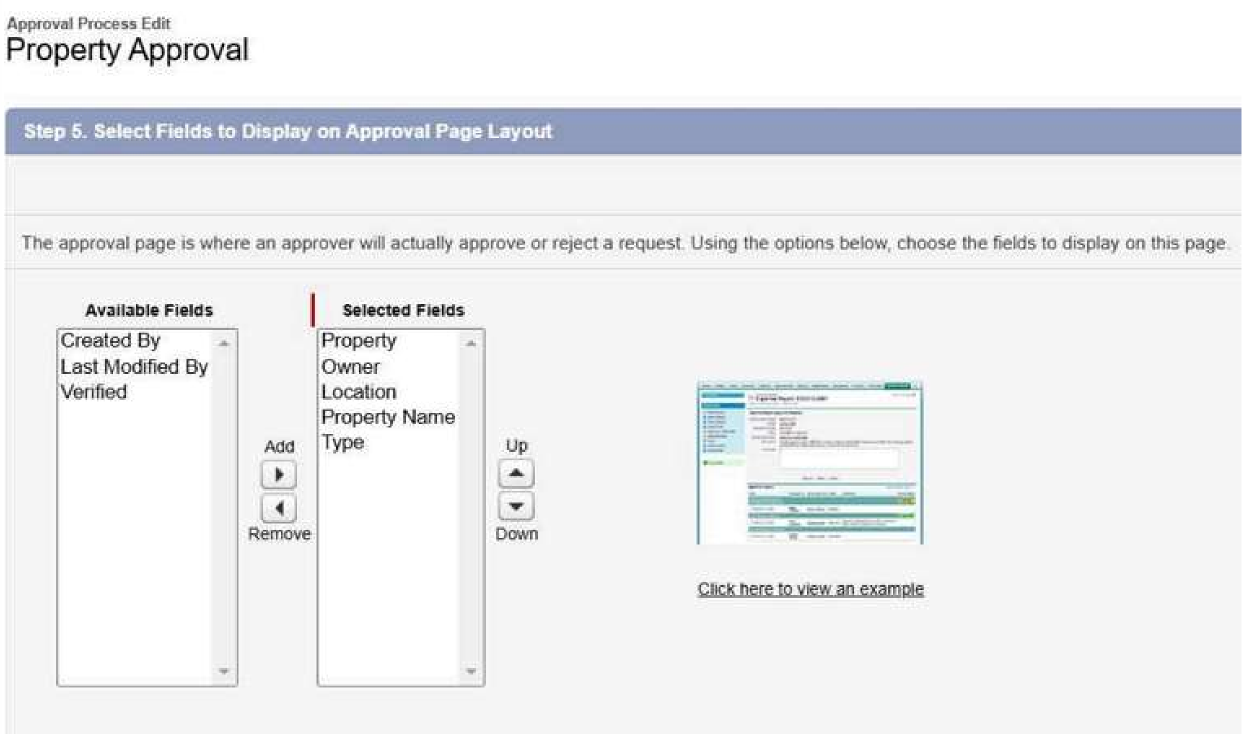


Create an ApprovalProcess for PropertyObject

An Approval processto approve or reject the records as according

Activity1

1. From Setup >>Process Automation >Approval Process
2. before proceeding we need to select property in tne manage approval process
3. Process Name - Property Approval
4. select 2 criteria -
5. Location- i not equal to- blank,
6. Verified- Equals- false
7. Click next and "Next Automated Approver Determined By" Select Manager
8. FromRecord Editability Properties >>Click on AdministratorsoRthe currently assigned approver can edit records during the approval process.
9. FromStep 5. Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.



1. Click Next and Select the initial Submiters »
2. Owner >> Property Owner
3. Roles>> Sales Manager

4. Save.

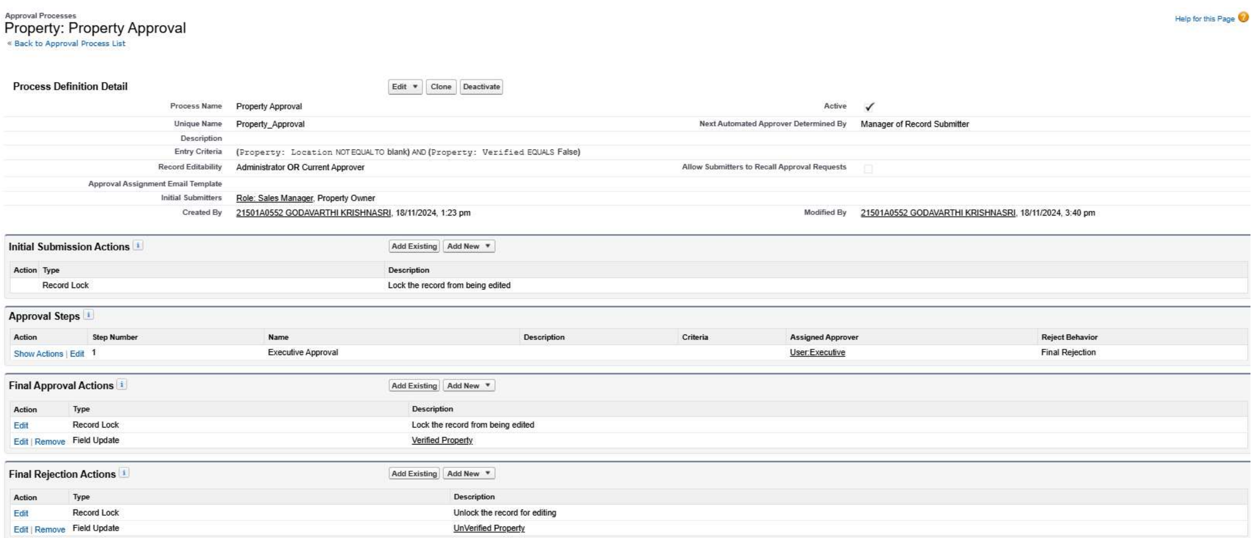
after saving we are directed to approval steps and we need to do as follows Add an approval step name "Executive Approval ”

click next and select the Approver as ”Sales Executive “and "Save" Add One field Update as "Verified Property"

1. Select Object »Property
2. Field to Update >> Verified
3. Field Data Type >» CheckBox
4. Select CheckBox Option as"True"
5. Save.

Add One fieldUpdate as "UnVerified Property"

1. Select Object » Property
2. Field to Update >»Verified
3. Field Data Type >» CheckBox
4. Select CheckBox Option as"False"
5. Save.



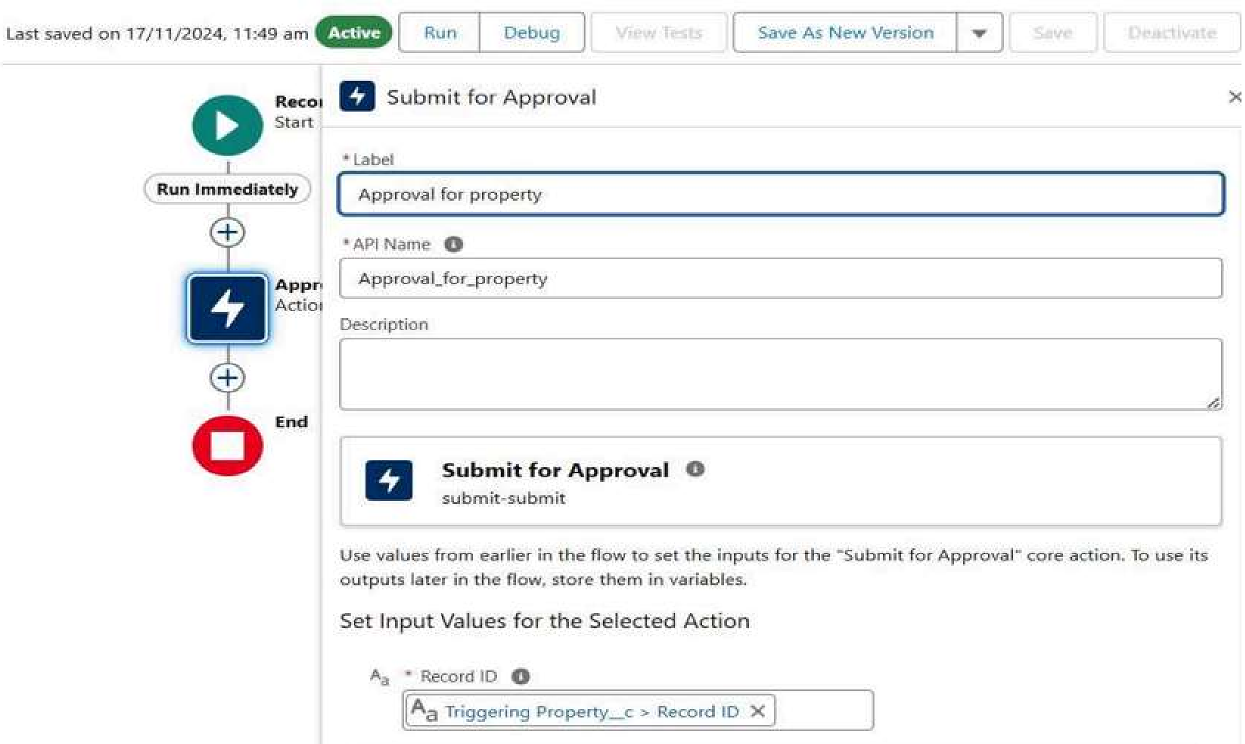
Create a Recordtrigger ñow to submit the Approval Process Automatically

A flow that can submit the recordsdirectly for approval

Activity1

a. FromSetup >>Search forFlows >>Click OnNew andSelect "Record Trigger Flow".
b. SelectObject >>Property
c. Select"Trigger the flowwhen" >> "A record is created"
d. SetEntry Conditions>> "None"
e. Add a"Action" >> "Submit for Approval"
f. Give Label >> Approval forproperty
g. Record Id>> (!SRecord.Id)
h. Done

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



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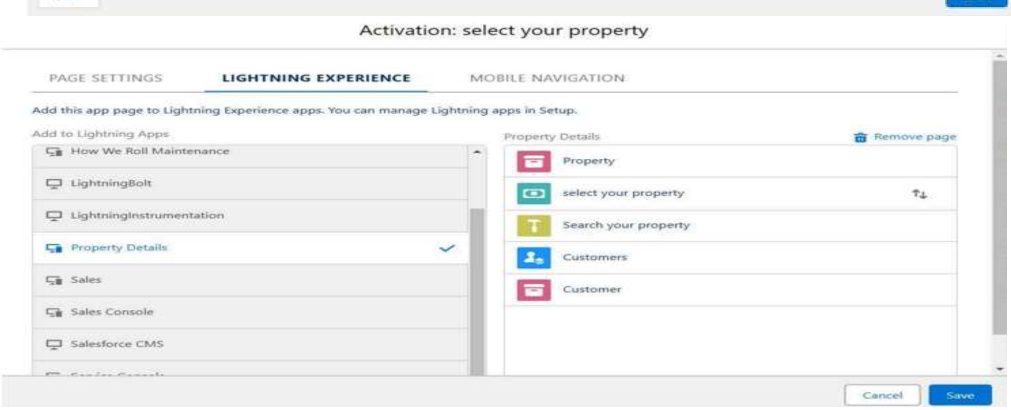


Create a LWC Component

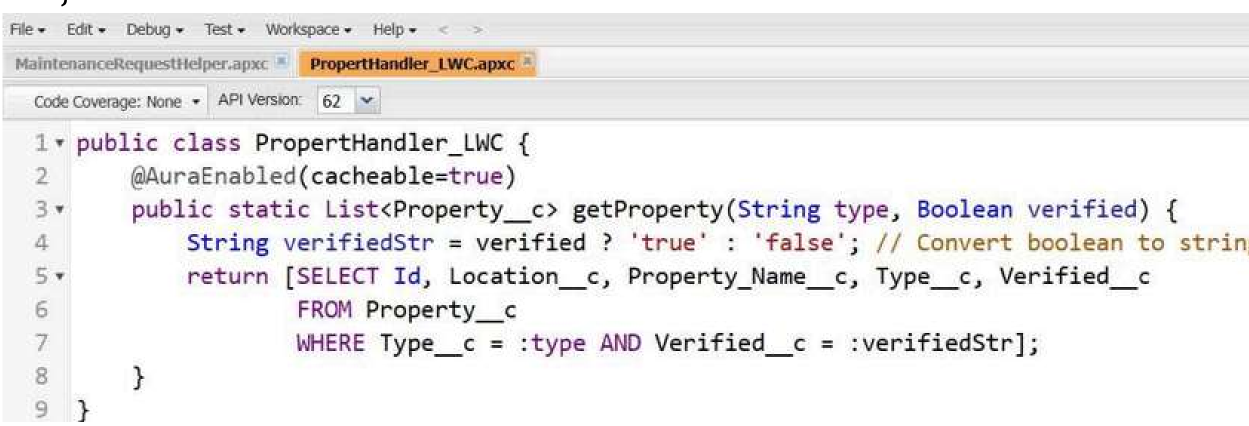
a. Create an LWCComponent for the customers so that only verified customers canaccess the verified properties and non Verified customers can access non verified properties, and deploy it on “Search your Property Page”

Activity1

1. Create an ApexClass and makeit aura enabled and name it “PropertHandIer_LWC”

Code: -

```
public class PropertHandler_LWC {
        @AuraEnabled(cacheable=true)
        public static List<Property__c> getProperty(String type, Boolean verified) {
                String verifiedStr = verified ? 'true' : 'false'; // Convert boolean to string
                return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c
                FROM Property__c
                WHERE Type__c = :type AND Verified__c = :verifiedStr];
        }
}
```



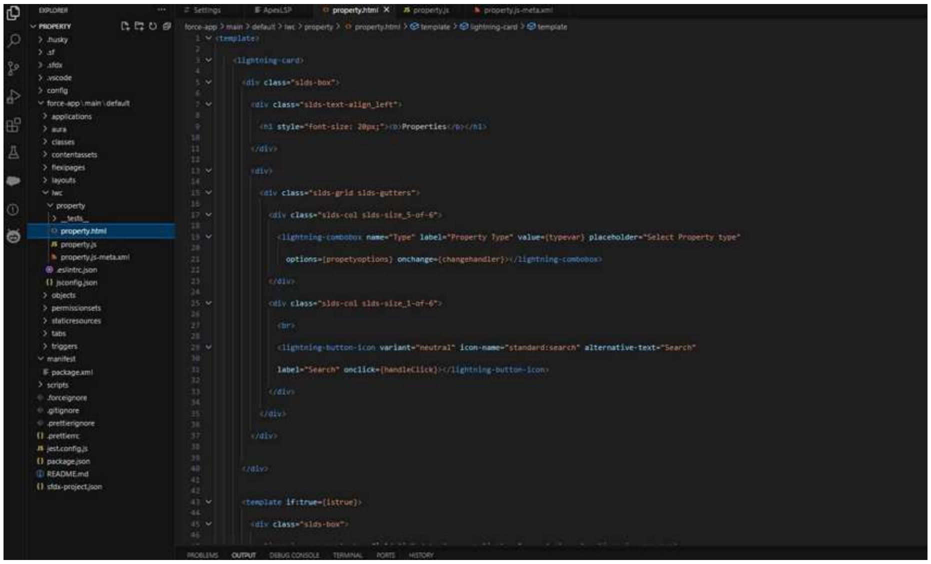
1. Create a Lightning Web Component in your VsCode, and (ctrl+shift +P) andclick on authorize an org.
2. Enter your login id and password to authorize your org.
3. Now (ctrl+shift +P) and Create a lightning Web Component and Name it Anything you want to. (Example -
4. In yourHtml File Write this code : -

Code :-

<template>

<lightning-card>

```
<div class="sIds-box">
 <div class="sIds-text-aIign_Ieft">
  <h1 styIe="font-size: 20px;"><b>Properties</b></h1>
 </div>
 <div>
  <div class="sIds-grid sIds-gutters">
   <div class=”sIds-col sIds-size_5-of-6“>
                              <lightning-combobox name="Type" IabeI="Property Type" value=(typevar}
pIacehoIder="SeIect Property type”
          options=(propetyoptions} onchange=(changehandIer}></lightning-combobox>
   </div>
   <div class=”sIds-col sIds-size_1-of-6”>
    <br><Iightning-button-icon variant=”neutraI" icon-name=”standard:search" alternative-text="Search"
    IabeI="Search" onclick=(handleCIick}></lightning-button-icon>
   </div>
  </div>
 </div>
</div>
<tempIate if:true=(istrue)>
 <div class="sIds-box">
          <lightning-datatable key-fieId="id" data=(propertyIist} columns=(coIumns}></Iightning-
datatabIe>
 </div>
</templates
<tempIate if:false=(isfalse}>
 <div class="sIds-box">
  <div styIe="font-size: 15px;"><b>No properties Are Found !!</b></div>
 </div>
</template›
</lightning-card>
</templates>
```

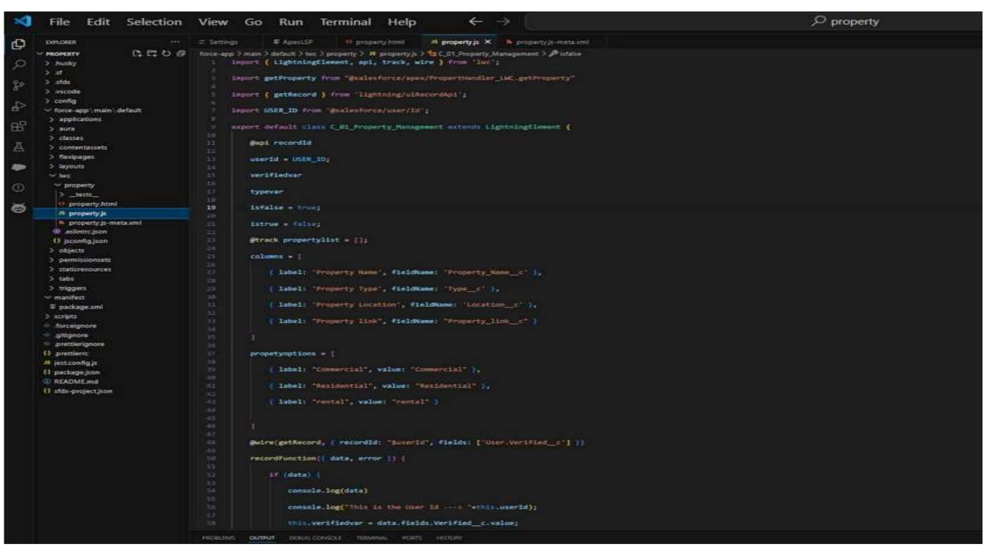


1. In YourJs File Write this code : -

Code :-

```
import ( LightningElement, api, track, wire ) from 'Iwc';

import getProperty from "@salesforce/apex/PropertHandIer_LWC.getProperty"

import ( getRecord } from 'lightning/uiRecordApi'; import USER

ID from '@salesforce/user/Id';

export default class C 01_Property_M anagementextends LightningElement ( @api recordld

   userld = 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: 'Locationc' ), ( label:

      "Property link", fieldName: "Property link  c"}

   propetyoptions= [

      ( label: "Commercial", value: "Commercial" }, ( label:

      "Residential", value: "Residential" ),

      ( label: "rental", value: "rental" }

   @wire(getRecord, ( recordld: "$userld", fields: ['User.Verified  c'] )) recordFunction(( data,

   error }) (
```

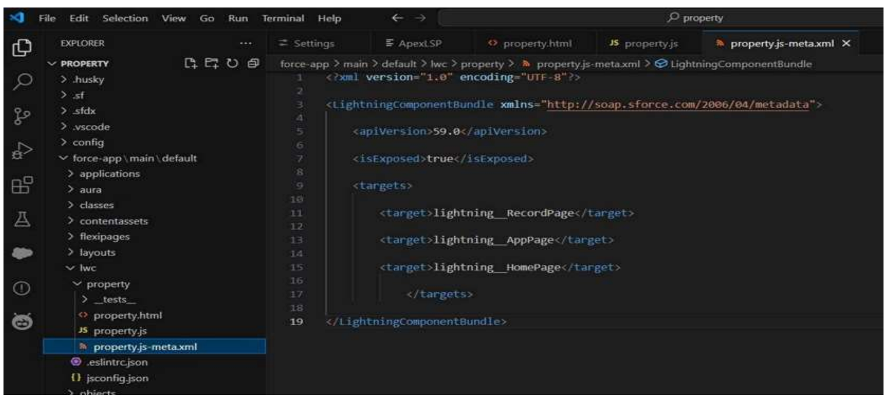
```
    if (data) ( console.log(data)
        console.log("This is the User Id ---> ”+this.user Id);
        this.verifiedvar = data.fields.Verified   c.value;
    } else (
        console.error(error)
        console.log('this is error')
changehandIer(event) (
    console.log(event.target.value); this.typevar =
    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.propertyIist =
                result; console.log(this.verifiedvar);
                console.log(this.typevar)
            ) else (
                this.isfalse = false;
                this.istrue = false;
        .catch((error) => (
            console.log(error)
```



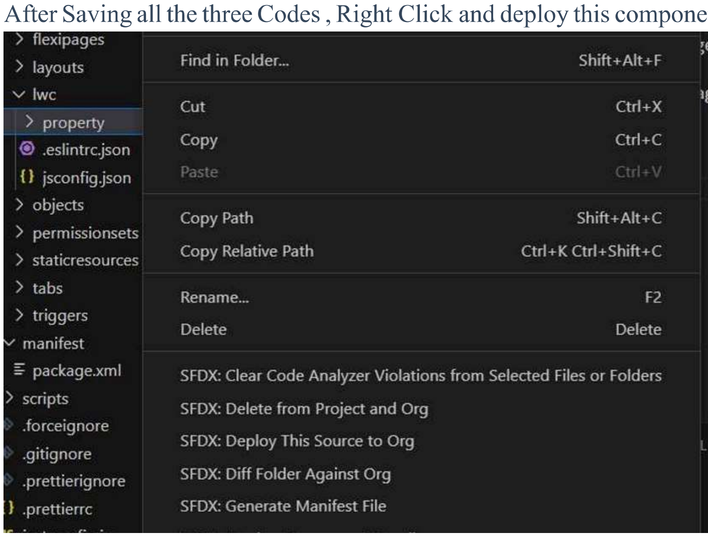
1. In Yourmetafile give your targets to deploy the component.

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>Iightning__RecordPage</targets
          <target>Iightning__AppPage</targets
          <target>Iightning__HomePage</targets
              </targets>
  </LightningComponentBundle>
```



After Saving all the three Codes , Right Click and deploy this componentto the org



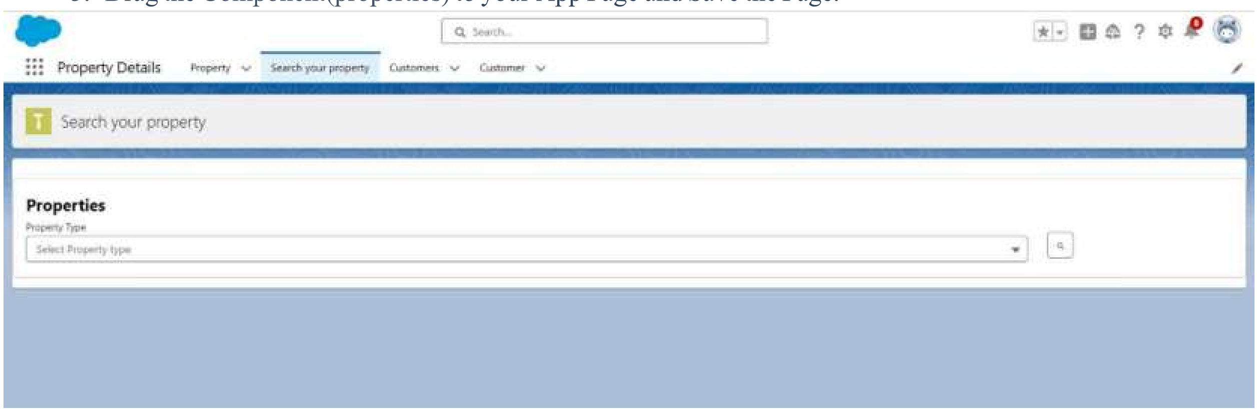
Drag this Component to your App Page

Adding the Componentto your Page

Activity1

1. From Setup >> Go to App Launcher >> Searchfor PropertyDetails
2. On thisPage click ongear icon andclick on EditPage
3. after clicking on edit pageit will bnedirected to apppages then

3. Drag the Component(properties) to your App Page and Save the Page.



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