

1. Project Overview:

This project is focused on a **crm application** to handle the clients and their property related, designed to address the problem of property and asset handling. The goal is to deliver a comprehensive solution by leveraging **salesforce platform** and **jotforms application**. Through this project, we aim to enhance user experience, data accuracy and support the long-term goals of organization.

2. Objectives :

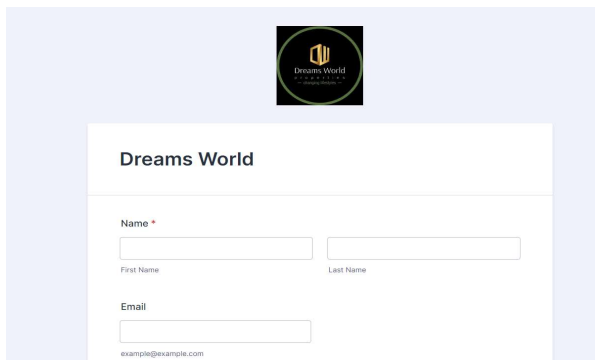
- create forms for user end to give input
- setup comprehensive salesforce environment to handle data and processing
- make the whole process of crm more efficient

3. Salesforce Key Features and Concepts Utilized :

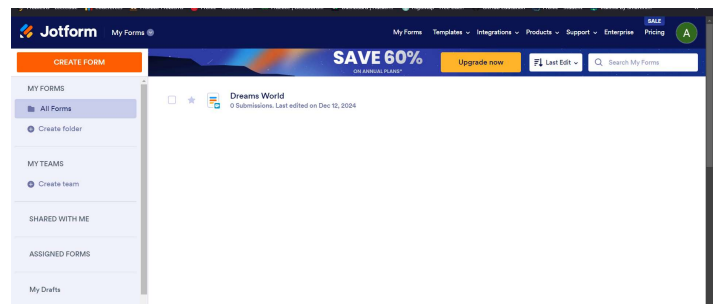
- salesforce objects
- classes
- process and trigger creation
- sales force app builder
- lightning components
- vscode salesforce integration

4. Detailed Steps to Solution Design

- Create a Jotform and integrate it with the org to create a record of customers automatically



The screenshot shows a Jotform titled "Dreams World" with a logo at the top. The form contains three input fields: "Name *" (split into "First Name" and "Last Name"), and "Email". Below the email field is a placeholder text "example@example.com".



SETUP -> OBJECT MANAGER																																																		
Property																																																		
Details	<div>Fields & Relationships</div> <div>8 Items, Sorted by Field Label</div> <div> <input type="text"/> Quick Find <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/> </div>																																																	
Fields & Relationships	<table border="1"> <thead> <tr> <th>FIELD LABEL</th><th>FIELD NAME</th><th>DATA TYPE</th><th>CONTROLLING FIELD</th><th>INDEXED</th></tr> </thead> <tbody> <tr> <td>Created By</td><td>CreatedById</td><td>Lookup(User)</td><td></td><td></td></tr> <tr> <td>Last Modified By</td><td>LastModifiedById</td><td>Lookup(User)</td><td></td><td></td></tr> <tr> <td>Location</td><td>Location__c</td><td>Text(255)</td><td></td><td></td></tr> <tr> <td>Owner</td><td>OwnerId</td><td>Lookup(User,Group)</td><td></td><td>✓</td></tr> <tr> <td>Property</td><td>Name</td><td>Text(80)</td><td></td><td>✓</td></tr> <tr> <td>Property Name</td><td>Property_Name__c</td><td>Text(255)</td><td></td><td></td></tr> <tr> <td>Type</td><td>Type__c</td><td>Text(255)</td><td></td><td></td></tr> <tr> <td>Verified</td><td>Verified__c</td><td>Checkbox</td><td></td><td></td></tr> </tbody> </table>					FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	Created By	CreatedById	Lookup(User)			Last Modified By	LastModifiedById	Lookup(User)			Location	Location__c	Text(255)			Owner	OwnerId	Lookup(User,Group)		✓	Property	Name	Text(80)		✓	Property Name	Property_Name__c	Text(255)			Type	Type__c	Text(255)			Verified	Verified__c	Checkbox		
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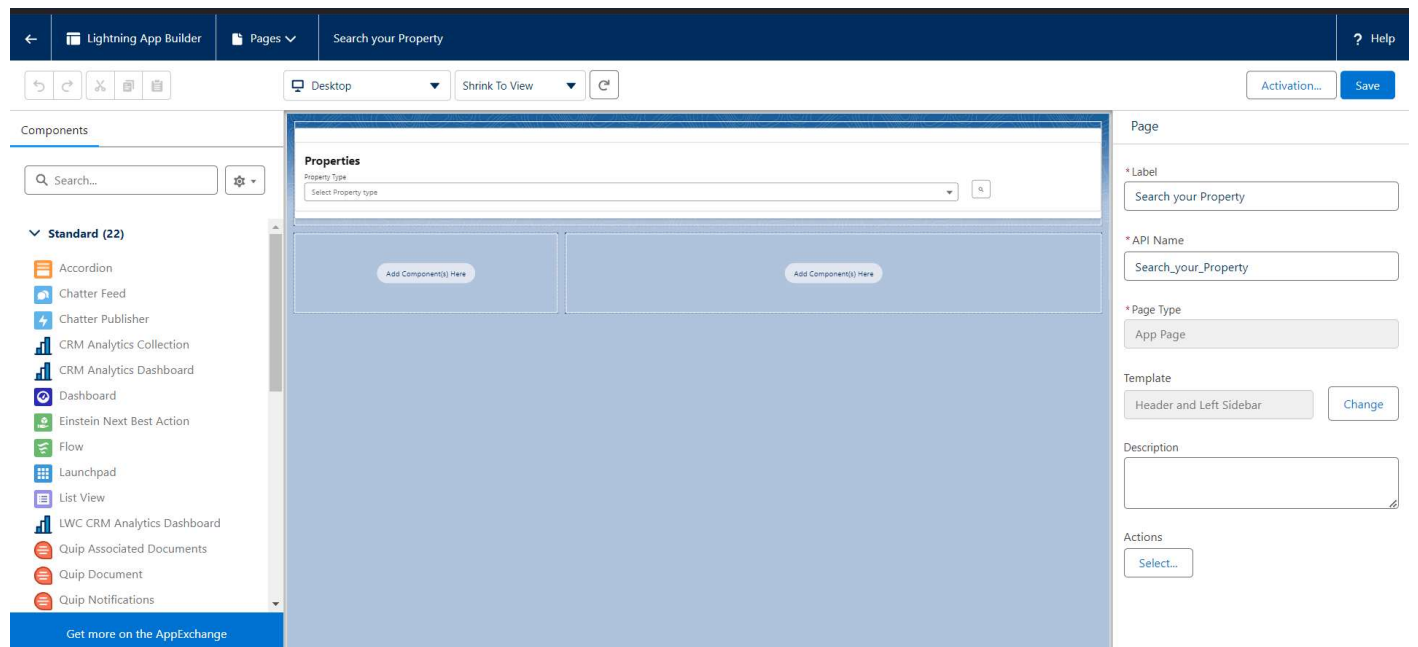
Creating process and triggers

```

1 public class PropertyHandler_LWC {
2
3     @AuraEnabled(cacheable=true)
4
5     public static list<Property__c> getProperty(string type , boolean v
6
7         return [SELECT Id, Location__c, Property_Name__c, Type__c, Veri
8
9
10    }
11
12 }

```

create app page using app builder



The screenshot displays the Salesforce Lightning App Builder interface for creating an app page titled "Search your Property".

Top Navigation: Includes "Lightning App Builder", "Pages", and a search bar "Search your Property".

Left Panel (Components): Lists various standard components under the "Standard (22)" category, including Accordion, Chatter Feed, Chatter Publisher, CRM Analytics Collection, CRM Analytics Dashboard, Dashboard, Einstein Next Best Action, Flow, Launchpad, List View, LWC CRM Analytics Dashboard, Quip Associated Documents, Quip Document, and Quip Notifications.

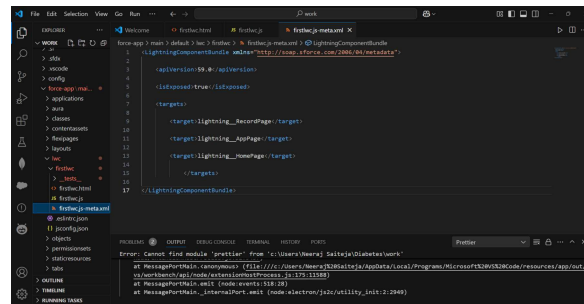
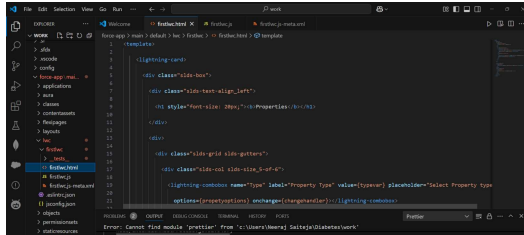
Center Canvas: Shows a preview of the app page layout. It includes a "Properties" section with a "Property Type" dropdown menu and a search bar. Below this, there are two placeholder boxes labeled "Add Component(s) Here".

Right Panel (Page Properties): Contains configuration options for the page:

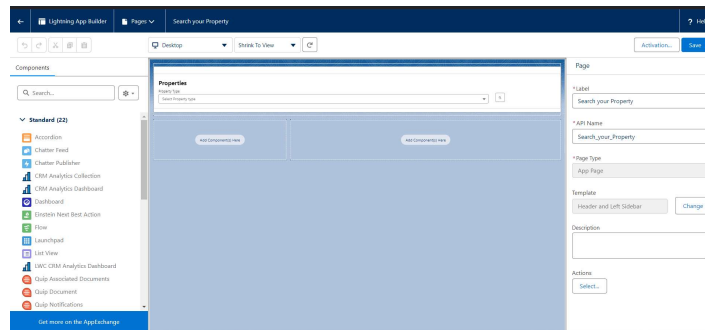
- * Label:** Search your Property
- * API Name:** Search_your_Property
- * Page Type:** App Page
- Template:** Header and Left Sidebar (with a "Change" button)
- Description:** A text area for the page description.
- Actions:** A "Select..." button.

Buttons for "Activation..." and "Save" are located at the top right of the right panel.

creating custom LWC (lightning web component)



adding new component to web page



5. Testing and Validation Describe the approach to testing:
tested all the classes and triggers clearly so that there will be no flaws in end application

6. Key Scenarios Addressed by Salesforce in the Implementation Project

simplifys and chanalizes the whole process of managing the propertys and clients with better user interface for both crm owners and users

7. Conclusion Summary of Achievements:

acquired clear understanding on salesforce environment and working with different tools
in sales force environment



