

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 optimizes operations, improving customer engagement and facilitating growth in the real estate market.

1. Client Management
 - a. Add, update, and delete client details.
 - b. Track client 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. Track properties 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 up with potential clients.
 - b. Schedule meetings and site visits.
 - c. Assign leads to specific team members.

Milestone 1: Create a Jotform and integrate it with the org 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 and click on start from scratch
2. Now create a form to get the customer details like Name, Phone, Email, Address and type 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/243220800174040>

The screenshot shows a web browser with multiple tabs. The active tab is titled 'Dreams World' and displays a Jotform titled 'Dreams World'. The form is titled 'Dreams World' and has a logo at the top. It contains the following fields:

- Name ***: A text input field.
- Email ***: A text input field.
- Phone Number ***: A text input field.
- Which type of Property are you looking for?**: A radio button group with three options: ☐ Residential, ☐ Commercial, and ☐ Industrial.
- Budget Amount ***: A text input field.
- Address ***: A text input field.
- City ***: A text input field.
- State ***: A text input field.
- Zip ***: A text input field.
- Save**: A green button at the bottom of the form.

At the bottom right of the page, there is a message: 'Activate Windows Go to Settings to activate Windows.'

Create Objects from Spreadsheet

Directly Creating Objects from Spreadsheet in Salesforce

Creating Customer Object :

1. Go to your object manager and click on create object from spreadsheet.
2. Click on the link to get the spreadsheet
3. [customer](#)

A	B	C	D	E	F	G	H	I	J	K
Customer	Phone Number	Emial	State	Property Type	Budget Amoun	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

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

The screenshot displays the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup'. Below it, the navigation menu shows 'Setup' with a dropdown arrow, and 'Home' and 'Object Manager' are visible. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Customer'. On the left, a sidebar lists various setup options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The 'Fields & Relationships' section is expanded, showing a table of 15 items sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Budget Amount (Number(18, 0)), City (Text(255)), Created By (Lookup(User)), Customer (Text(255)), Customer (Name, Text(80), indexed), Emial (Email), Last Modified By (Lookup(User)), Owner (Lookup(User, Group), indexed), and Phone Number (Number(18, 0)).

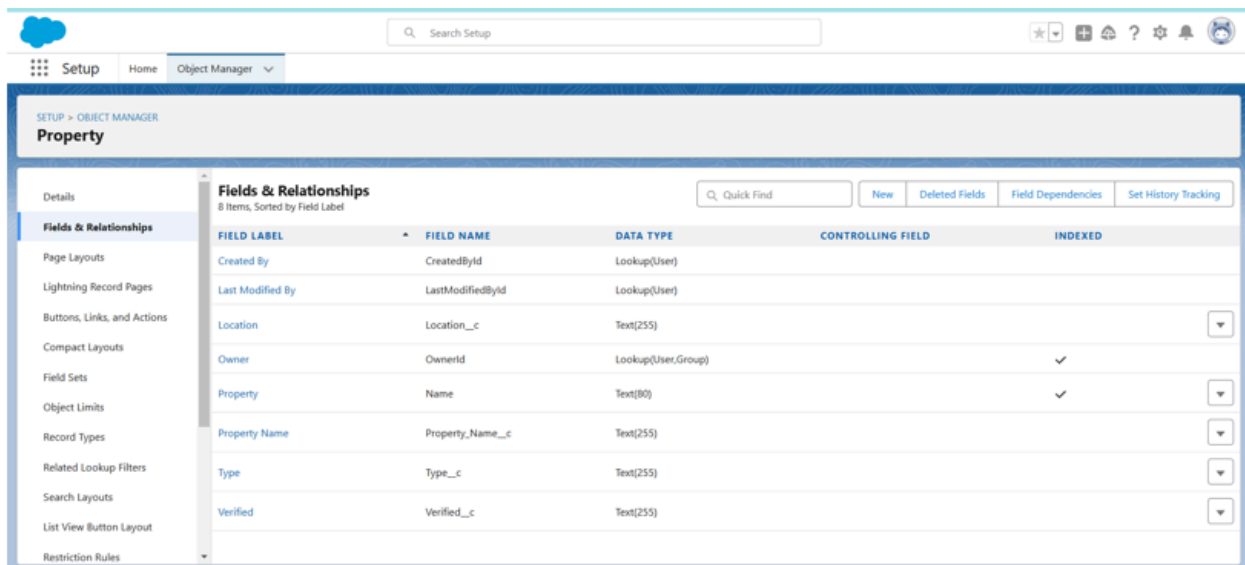
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Budget Amount	Budget_Amount__c	Number(18, 0)		
City	City__c	Text(255)		
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Text(255)		
Customer	Name	Text(80)		✓
Emial	Emial__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone Number	Phone_Number__c	Number(18, 0)		

Creating Property Object :

1. Follow the same from the customer object to create the Property Object
2. [Property](#)

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

After downloading, upload the file, map the fields and upload to create an object. the files as follows.



The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the 'Property' object. The 'Fields & Relationships' tab is selected, displaying a list of 8 fields. The fields are sorted by Field Label. The table shows the following fields:

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	Text(255)		

Integrate Jotform with Salesforce Platform

In this Milestone we are going to integrate jotform with Salesforce

Activity

1. On the Jotform Platform, Click on Integration and choose Salesforce
2. Click on User Integration and choose “Add to From”

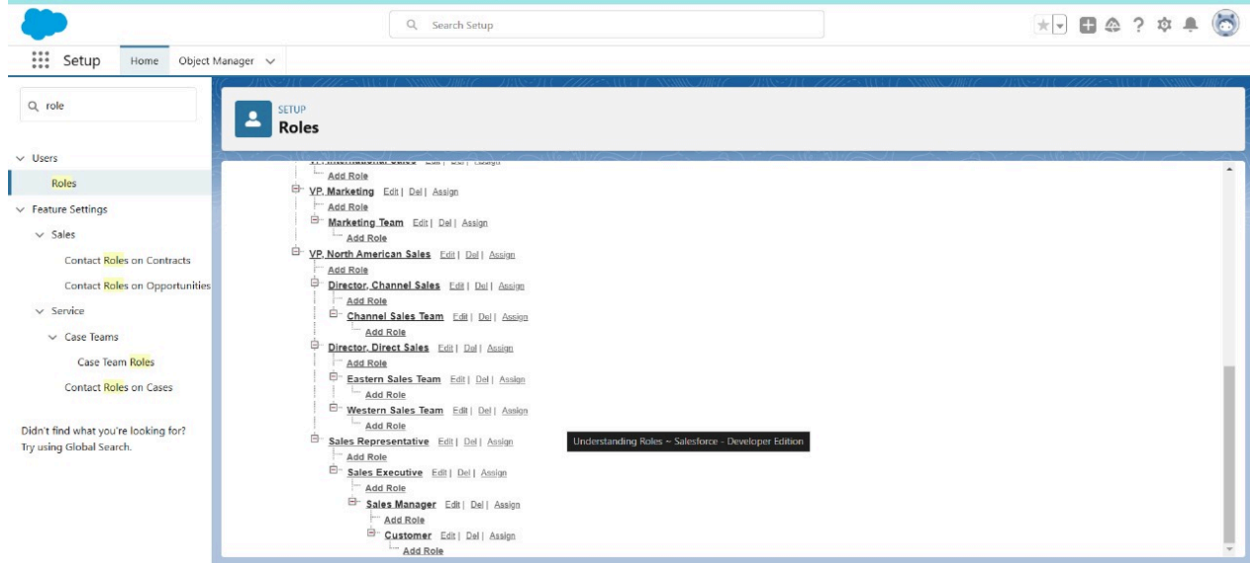
3. Select the Org with which you want to Integrate your jotform with and select your account
4. Select an Action -Create a record.
5. Select a Salesforce Object : - Customer

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

Then “Save the Integration” and “Finish”.

here we need to Create Roles as per business requirement

Activity:- 1



1. if we don't find sales representative we need to create it according to the need
2. It will use 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 objects will be displayed

Activity 1

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.
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.

New Lightning App

App Details & Branding

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

App Details

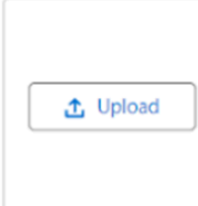
*App Name ⓘ

*Developer Name ⓘ

Description ⓘ

App Branding

Image ⓘ



⬆️ Upload

Primary Color Hex Value ⓘ

⌵

#AAE420

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

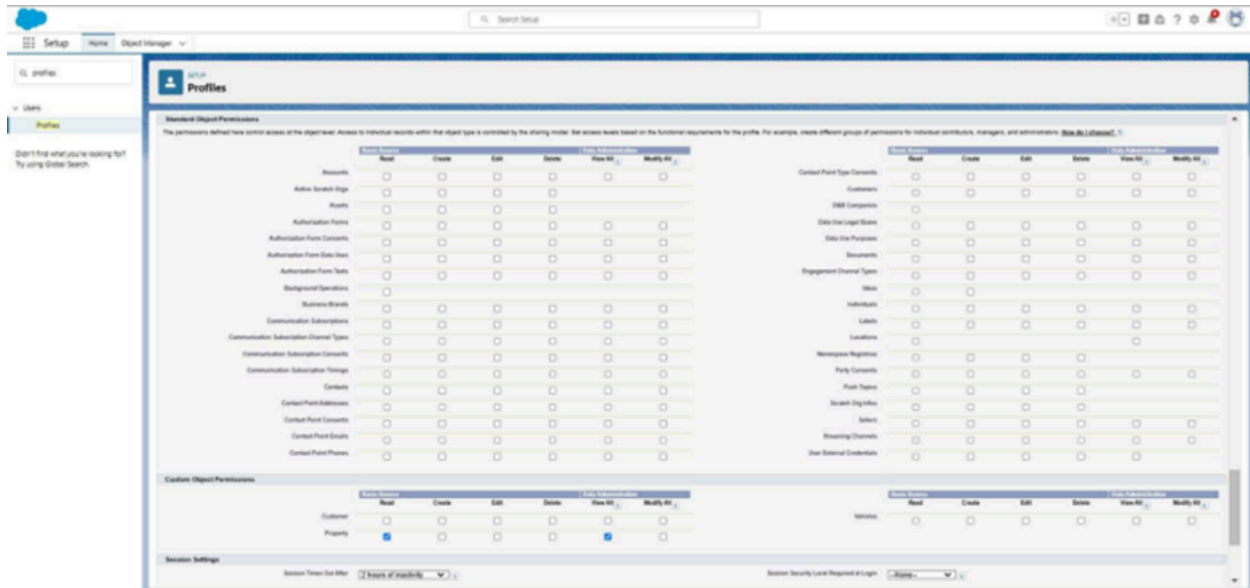
App Launcher Preview

Create Profiles

Create profiles as per business requirement

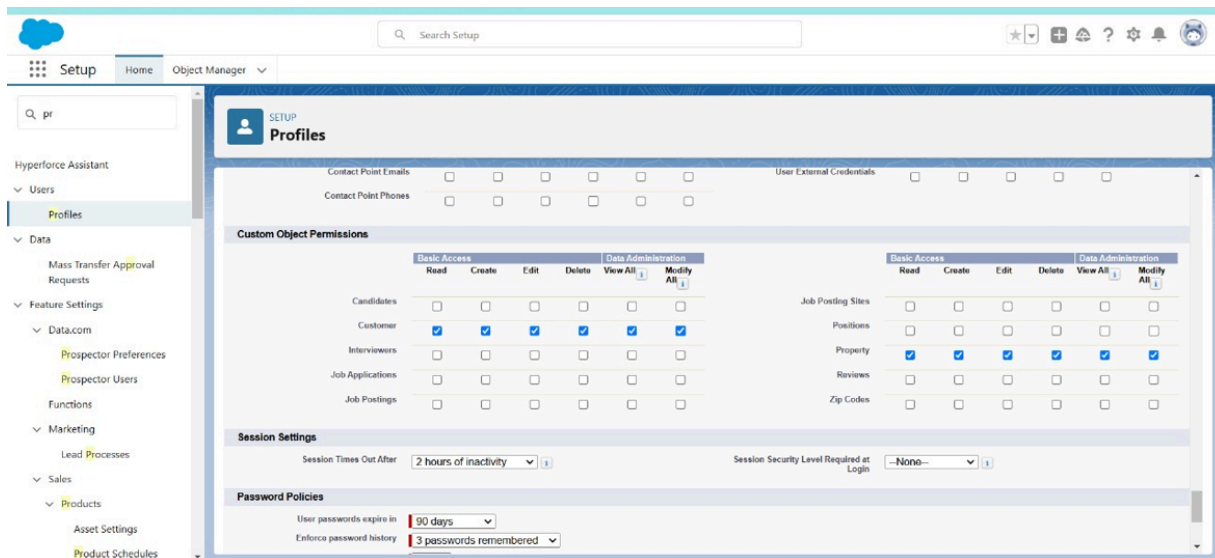
Creating Customer Profiles

1. From Setup? Go to Profiles and Clone (standard platform)Salesforce 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 Manager Profiles:-

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.
4. Uncheck all the Custom Object Permissions and check only “modify all” from “Property” and “Customer”.



Create a CheckBox field on user

Create Field on the User as per the business requirement.

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”

The screenshot displays the Salesforce Object Manager interface for the 'User' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is titled 'User Custom Field Verified' and includes a 'Back to User Fields' link. Below this, there are tabs for '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', and 'Validation Rules'. The 'Fields & Relationships' tab is active, showing the 'Custom Field Definition Detail' for the 'Verified' field. The field information table lists the field name as 'Verified', API name as 'Verified__c', and data type as 'Checkbox'. The 'General Options' section shows the default value as 'Unchecked'. The 'Validation Rules' section indicates that no validation rules are defined. At the bottom right, there is a 'Activate Windows' watermark.

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	21501A0556.GOPIDESI.SAI.RAMYA.SREE, 19/11/2024, 12:06 pm
Modified By	21501A0556.GOPIDESI.SAI.RAMYA.SREE, 19/11/2024, 12:06 pm

General Options	
Default Value	Unchecked

Validation Rules	
No validation rules defined.	

Create Users

Create three different users with three different Roles and profiles as 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

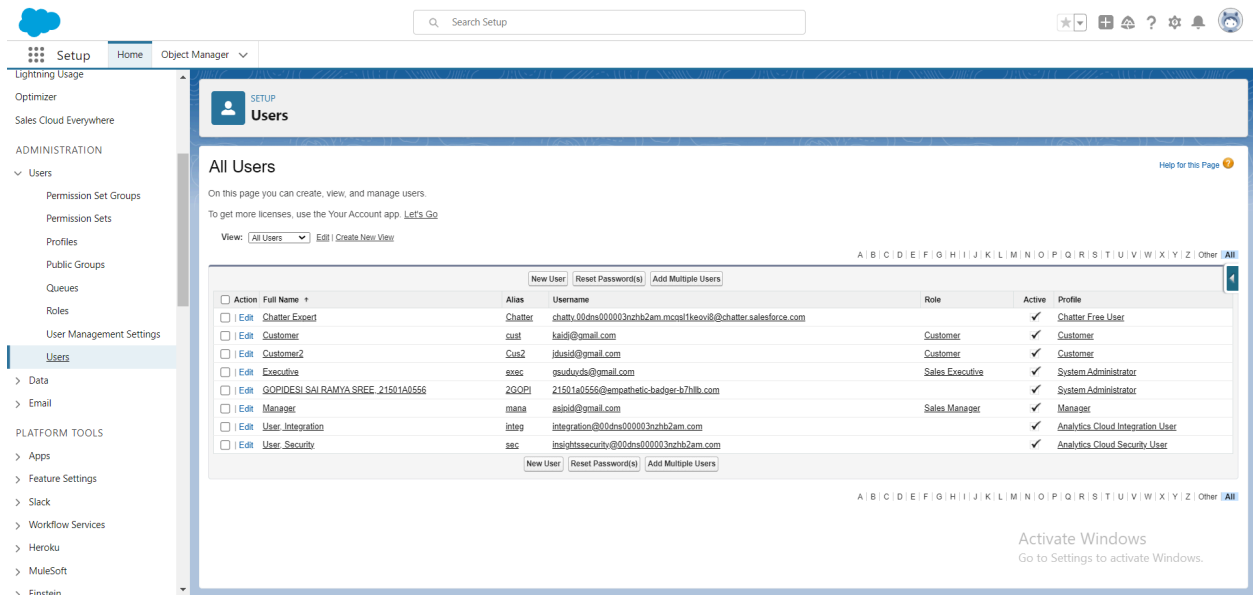
1. Goto Setup > Administration >> Users >> New User
2. Last Name >> Manager
3. Role >> Sales Manager
4. License >> Salesforce Platform

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 Approval Process for Property Object

An Approval process to approve or reject the records as according

Activity 1

1. From Setup >> Process Automation > Approval Process
 2. before proceeding we need to select property in the 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. From Record Editability Properties >> Click on Administrator so the currently assigned approver can edit records during the approval process.
 9. From Step 5. Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.
-
1. Click Next and Select the initial Submitters »
 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.

Activate the Approval Process.

SETUP
Approval Processes

Property

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. Read the help topic
2. View the checklist
3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: **Property**

A listing of both active and inactive approval processes for **Property** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

Active Approval Processes [Reorder](#)

Action	Process Order	Approval Process Name	Description
Edit Deactivate	1	Property Approval	

Inactive Approval Processes

No approval processes available

Create a Record trigger now to submit the Approval Process Automatically

A flow that can submit the records directly for approval

Activity1

- From Setup >> Search for Flows >> Click On New and Select “Record Trigger Flow”.
- Select Object >> Property
- Select “Trigger the flow when” >> “A record is created”
- Set Entry Conditions >> “None”
- Add a “Action” >> “Submit for Approval”
- Give Label >> Approval for property
- Record Id >> (!\$Record.Id)
- Done

Save the Flow and Give label as “Property Approval” and “Activate”

The screenshot displays the Salesforce Flow Builder interface for a flow named 'Property Approval - V1'. The flow is a 'Record-Triggered Flow' for the 'Property' object, triggered by 'A record is created'. The flow steps are: 'Start' (Record-Triggered Flow), 'Run Immediately' (connector), 'Approval for property' (Action), and 'End'. The right-hand pane shows the 'Configure Start' configuration for the trigger. Under 'Select Object', 'Property' is selected. Under 'Configure Trigger', the trigger is set to 'Trigger the Flow When: A record is created'. Under 'Set Entry Conditions', the condition requirements are set to 'None'.

Flow Builder: Property Approval - V1

Last saved on 18/11/2024, 12:51 pm **Active** Run Debug View Tests Save As New Version Save Deactivate

Select Elements Undo Redo Auto-Layout

Start
Record-Triggered Flow
Object: **Property** [Edit](#)
Trigger: **A record is created**
Optimize for: **Actions and Related Records**
[+ Add Scheduled Paths \(Optional\)](#)
[Open Flow Trigger Explorer for Property](#)

Run Immediately

Approval for property
Action

End

Configure Start

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

Configure Trigger
* Trigger the Flow When:
☒ A record is created
☐ A record is updated
☐ A record is created or updated
☐ A record is deleted

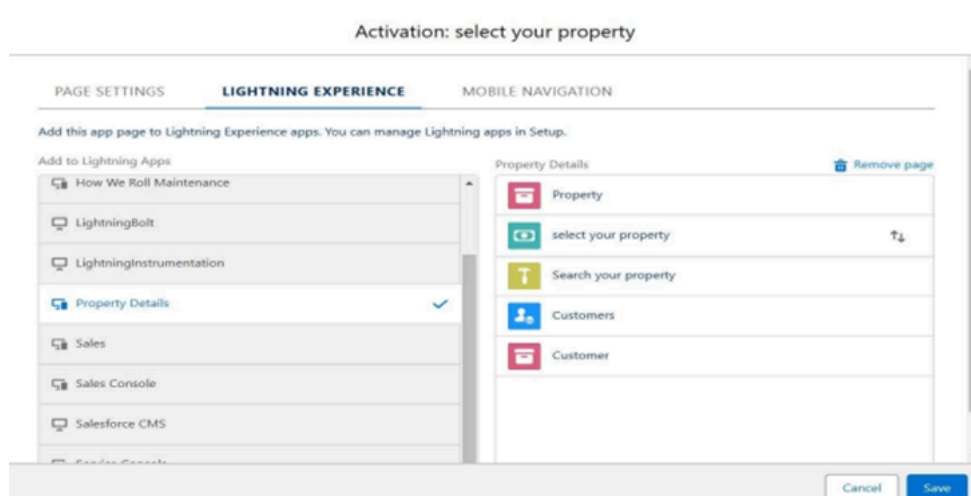
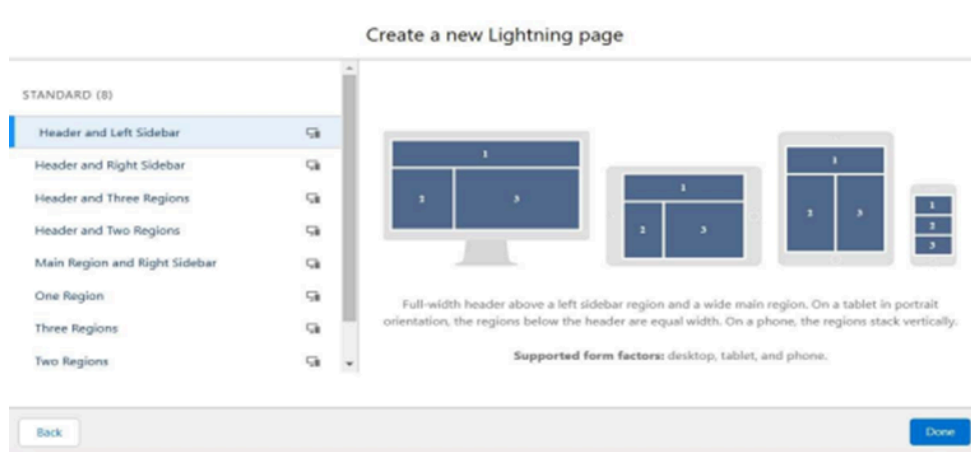
Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend 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.
Condition Requirements

Create an App Page

Create an App Page on the Property details Object named as “Search Your Property”

Activity1

1. From Setup »Go to Lightning App Builder >> Click on New >> Select App Page and
2. Click on Next.
3. Give Labelas“Search your Property” click “Next”.
4. Click “header and Left Sidebar” and Click on “Done”
5. Click on “Save ”and then click on “Activate”.
6. From Page Settingsselectpageactivationas “Activate for all Users”.
7. From Lightning ExperienceClick on “Property Details” and click on Add Page“.
8. Then Clickon“Save”



Create a LWC Component

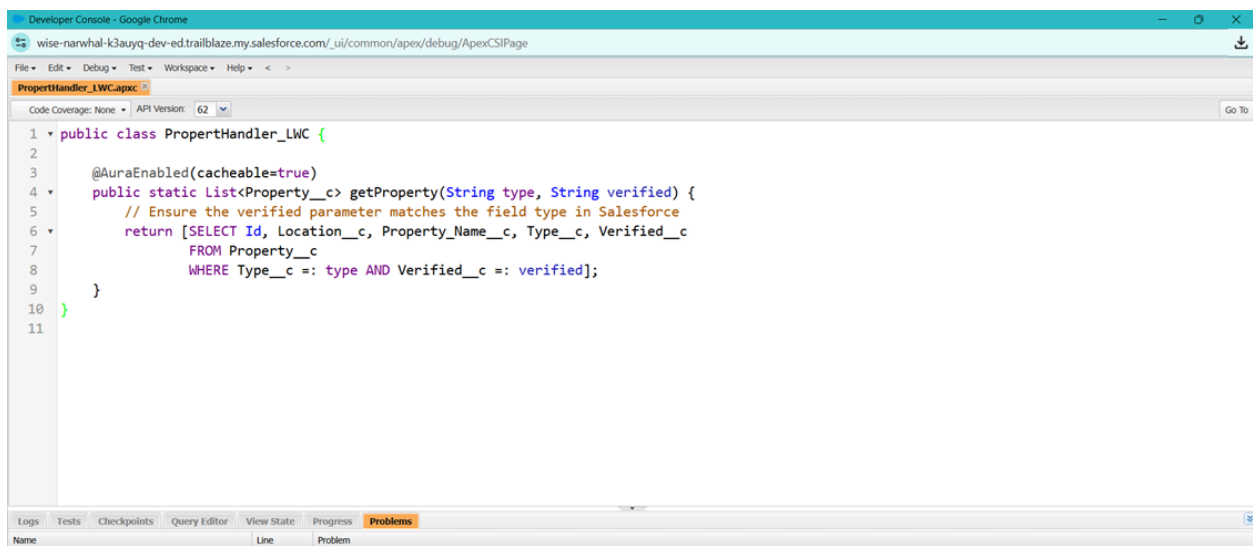
- a. Create an LWCComponent for the customers so that only verified customers can access the verified properties and non Verified customers can access non verified properties, and deploy it on “Search your Property Page”

Activity1

1. Create an ApexClass 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) ( 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) and click 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="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={propetyoptions} 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={istru}>

  <div class="slds-box">

    <lightning-datatable key-field="id" data={propertylist} columns={columns}></lightning-
datatable>

  </div>

</templates>
```



```

<template if:false={isfalse}>

<div class="slds-box">

<div style="font-size: 15px;"><b>No properties Are Found !!</b></div>

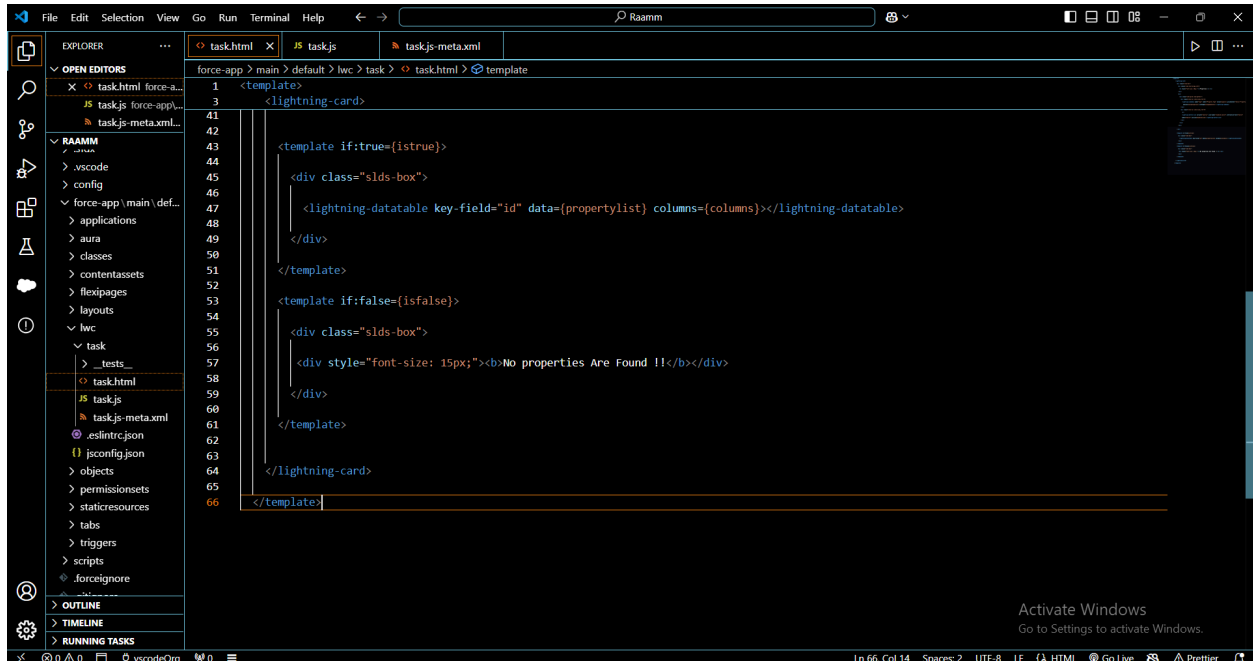
</div>

</template>

</lightning-card>

</templates>

```



1. In YourJs File Write this code :-

Code :-

```

import ( LightningElement, api, track, wire ) from 'lwc';

import getProperty from "@salesforce/apex/PropertyHandler_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; istru =

  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" }
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)

```

```
File Edit Selection View Go Run Terminal Help < -> Raamm
task.html task.js taskjs-meta.xml
force-app > main > default > lwc > task > JS task.js > C_01_Property_Management > ifalse
1 import { LightningElement, api, track, wire } from 'lwc';
2
3 import getRecord from '@salesforce/apex/PropertyHandler_LWC.getRecord';
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     userId = USER_ID;
13     verifiedvar;
14     typevar;
15
16     isfalse = true;
17
18     istrue = false;
19
20     @track propertylist = [];
21
22     columns = [
23         { label: 'Property Name', fieldName: 'Property_Name_c' },
24         { label: 'Property Type', fieldName: 'Type_c' },
25         { label: 'Property Location', fieldName: 'location_c' },
26         { label: 'Property link', fieldName: 'Property_Link_c' }
27     ]
28
29     propertyoptions = [
30
31     ]
32
33     }
34
35
36
37
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```

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>

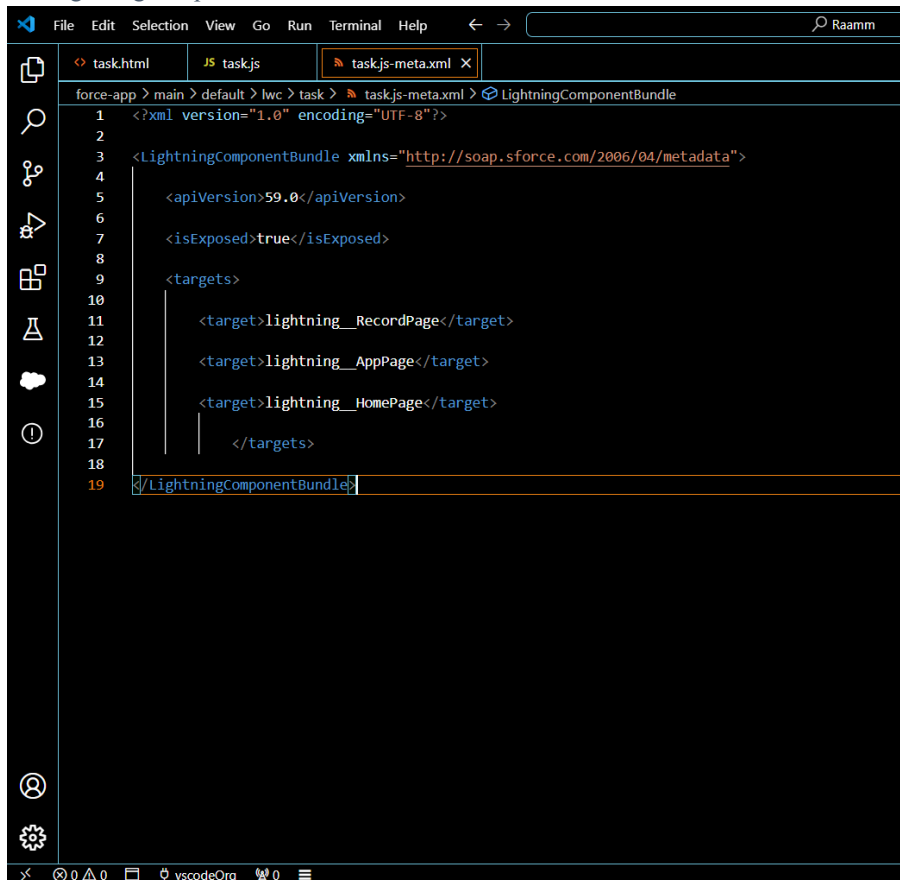
    <target>Lightning__RecordPage</target>

    <target>Lightning__AppPage</target>

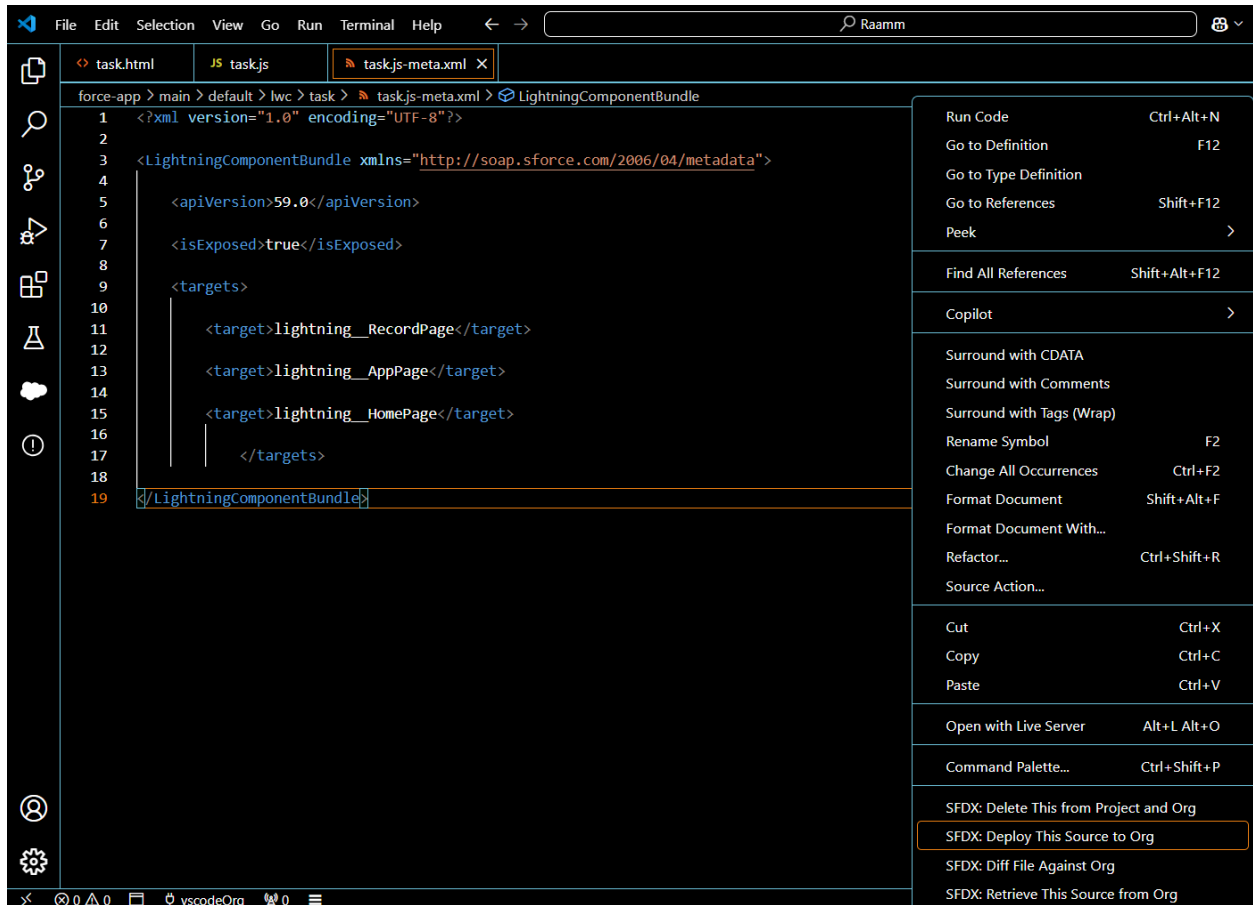
    <target>Lightning__HomePage</target>

  </targets>

</LightningComponentBundle>
```



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

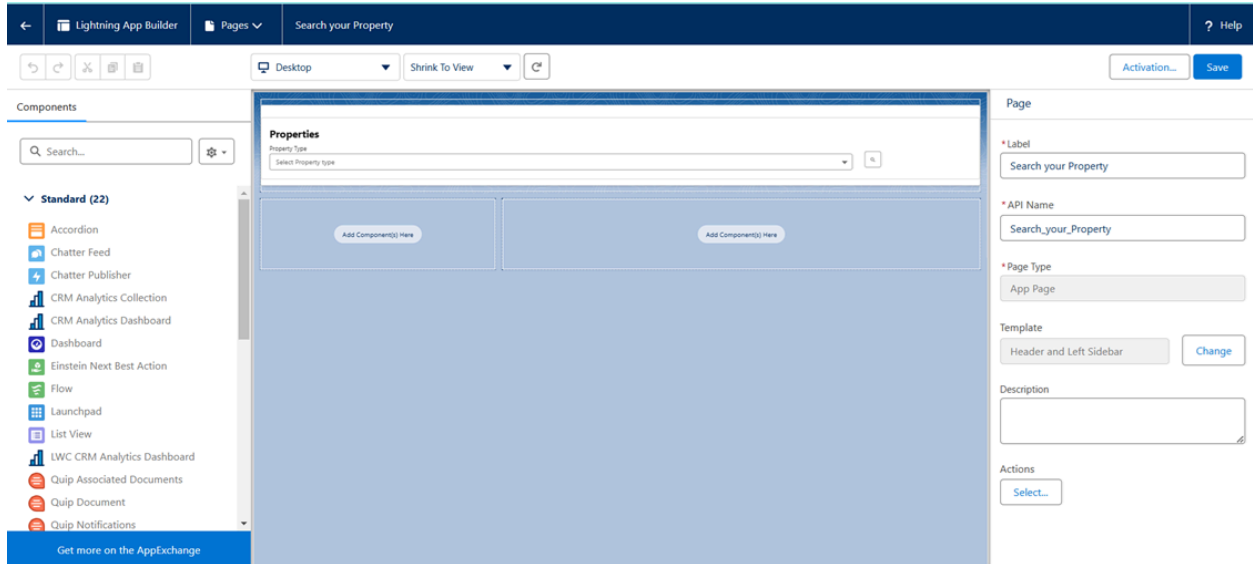


Drag this Component to your App Page

Adding the Component to your Page

Activity 1

1. From Setup >> Go to App Launcher >> Search for Property Details
2. On this Page click on gear icon and click on Edit Page
3. after clicking on edit page it will be redirected to app pages then
 3. Drag the Component (properties) to your App Page and Save the Page.



Give Access of Apex Classes to Profiles

The Apex Class has a Security, Enable the security for the profiles that needs to access this class.

1. Activity 1

From Setup >> Search For Apex Classes >> Click on "Security" behind "PropertyHandlerLWC".

2. From Profiles Add "Manager" and "Customer" and "Save".

