SALESFORCE VIRTUAL INTERNSHIP

SmartInternz

A CRM Application To Handle The Clients And Their Property Related Requirements

By

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Project Abstract:

The project aims to develop a Salesforce CRM application to streamline client and property management. This enables efficient tracking of client interactions and property details, facilitate property searches, and handle client requests. Integration with other tools and robust reporting will enhance data accuracy and process efficiency. Ultimately, the CRM will improve client satisfaction and provide a streamlined approach to managing both clients and properties.

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INTRODUCTION

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.

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

To create a form using JotForm that allows customers to input their details directly into Salesforce and enables admins to create a user in the organization, follow these steps:

Step 1: Create the Form in JotForm

1. Sign up or log in to JotForm: Go to JotForm and sign in to your account.

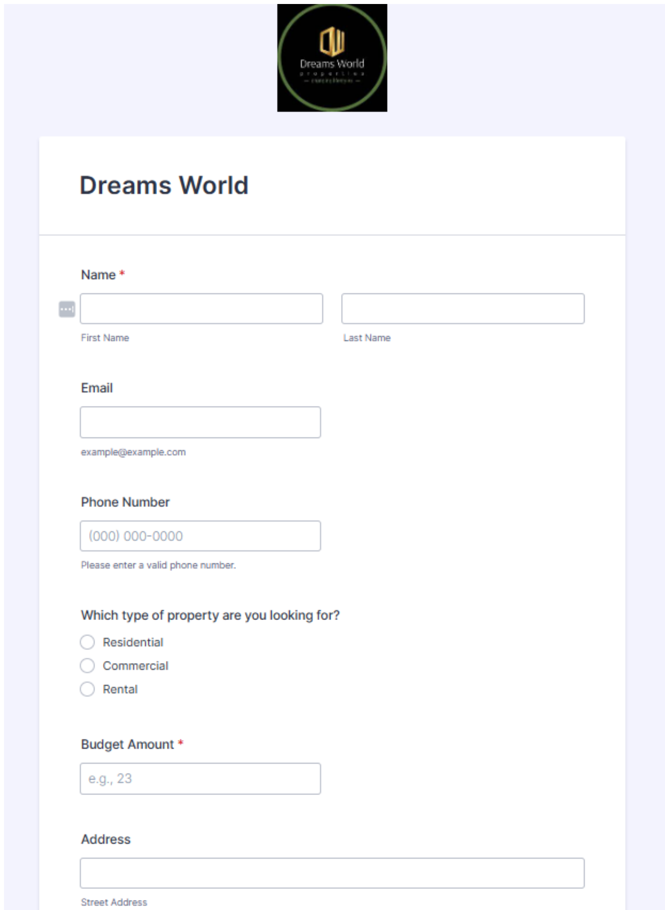
2. Create a new form: Click on the "Create Form" button and choose a blank form or a template that suits your needs.

3. Add fields to the form: Add the necessary fields to collect customer information, such as Name, Email, Type of Property, Budget Amount, Address and Phone Number.

4. Once the form is created, publish it by clicking on publish.

5. The JotForm created link:

https://form.jotform.com/242201144032032



Activity 1: Create Objects from Spreadsheet Creating Objects from Spreadsheet in Salesforce

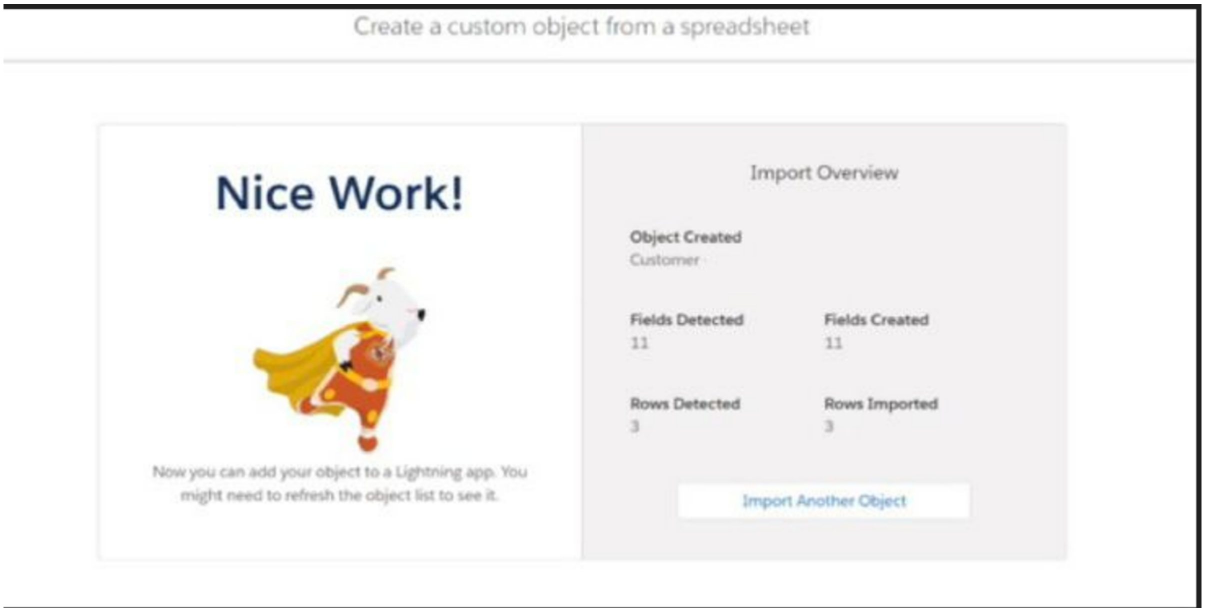
Step 1: Login to the Salesforce account https://login.salesforce.com/
Credentials Required: Username and Password
This will redirect you to the salesforce setup page.

Create Customer Object

For creating the customer object follow the steps:

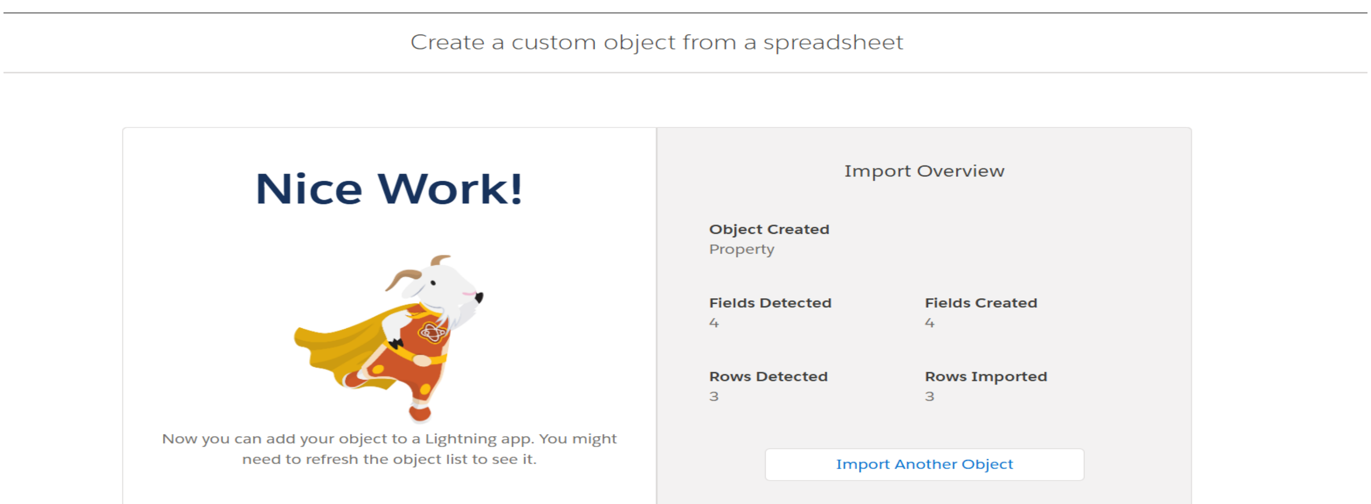
1. Go to the object manager and click on create object from spreadsheet.
2. Download the customer spreadsheet provided Customer
3. After downloading, upload the file and map the fields and upload to

create an object.



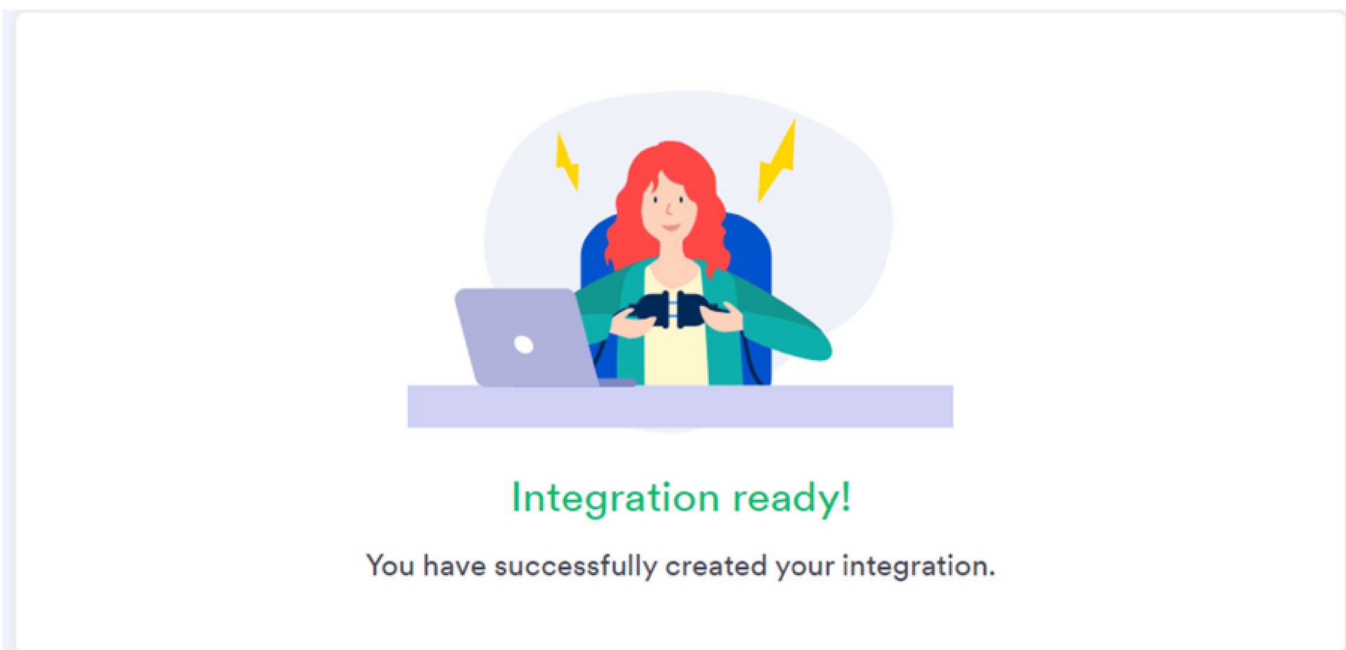
Create Property Object

1. Follow the same from creating the Property Object with the Property spreadsheet.



Activity 2: Integrate JotForm with Salesforce Platform

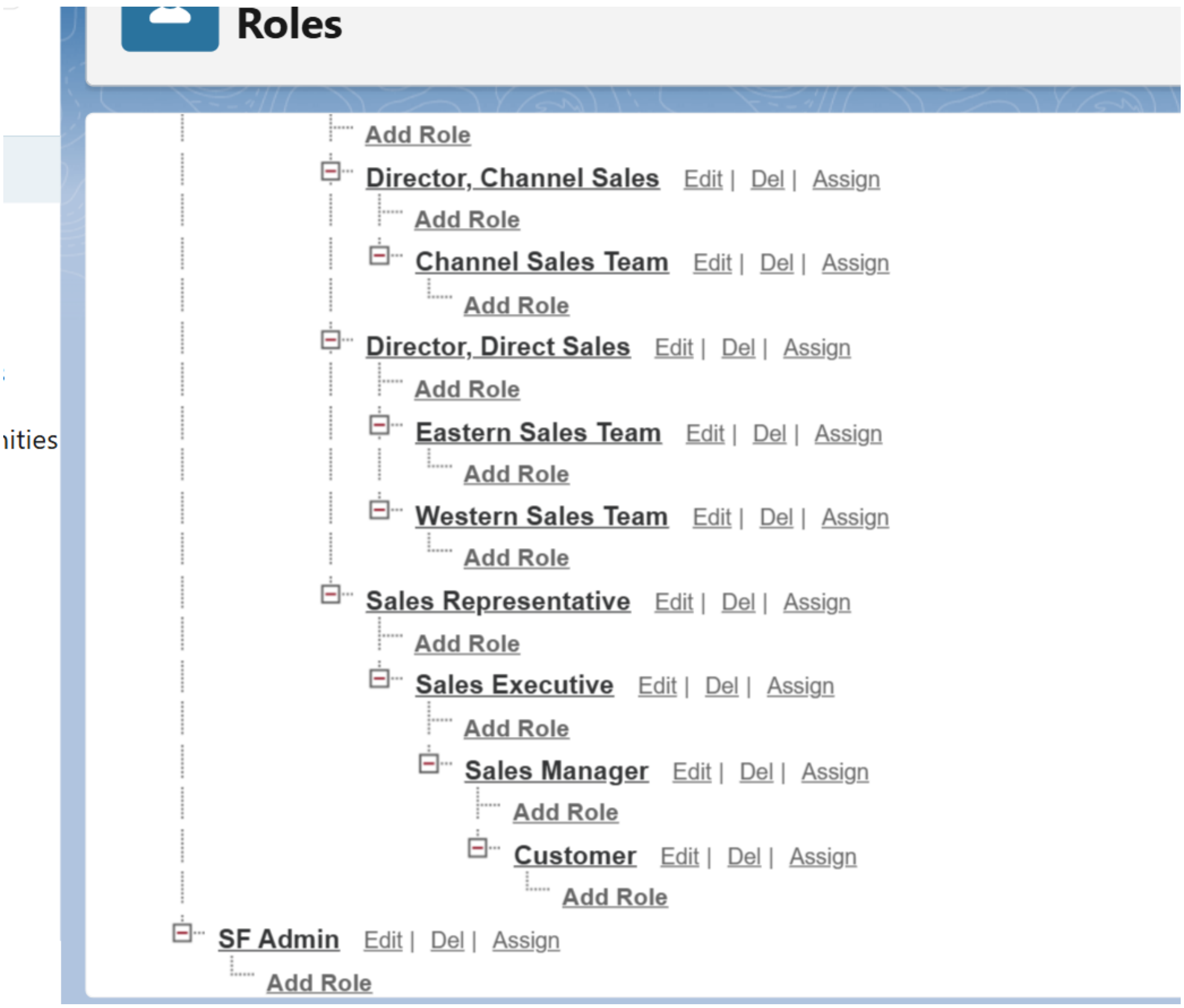
In this Activity we are going to integrate JotForm with Salesforce.
1. On the JotForm Platform, Click on Integration and choose Salesforce.
2. Click on User Integration and choose "Add to Form".
3. Select the Org with which you want to Integrate your JotForm with.
4. Select an Action.
5. Select a Salesforce Object: - Customer
6. Map Each and every field on the Object with the fields on the form and "Save Action".
7. Then "Save the Integration" and "Finish".



Activity 3: Create Roles

Creating roles as per the business requirement.

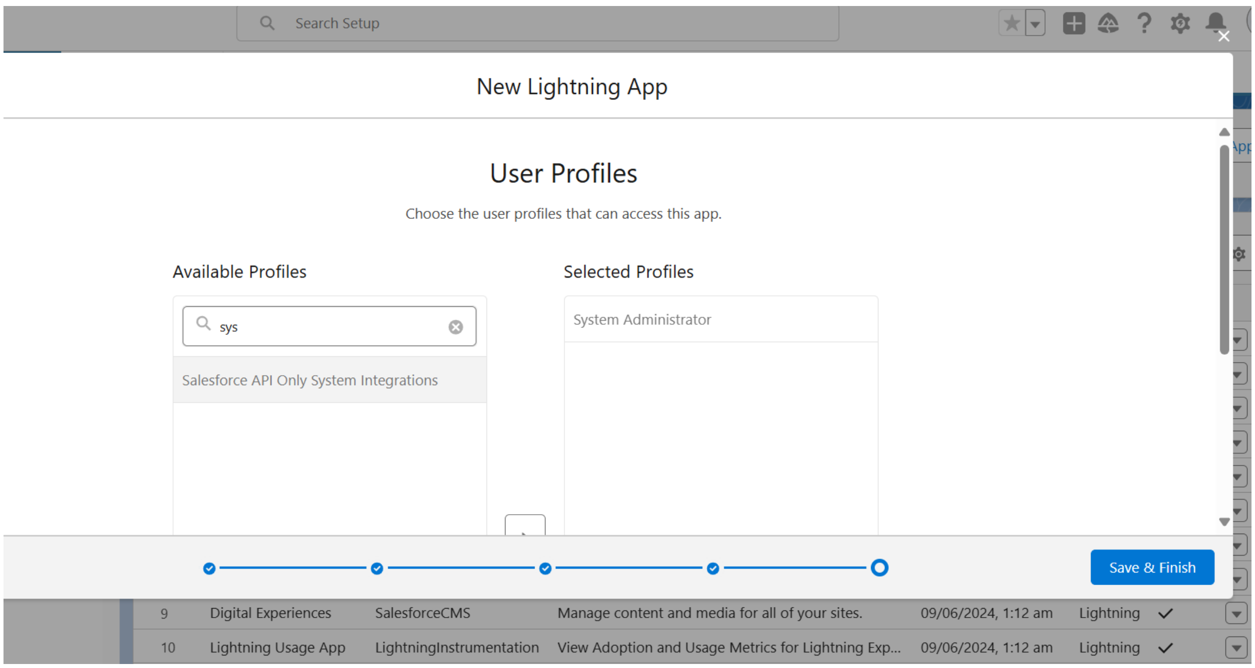
1. Go to Setup and Click on Roles, then click on Expand all and Add a Role just below the Sales Representative.
2. Label - Sales Executive; Reports to - Sales Representative
3. Similarly Create a Role Name “Sales Manager” below Sales Executive which reports to Sales Executive.
4. Similarly Add a Role below Sales Manager labeled as “Customer” which reports to Sales Manager.



Activity 4: Create A Property Details App

Creating an app where the objects will be displayed.

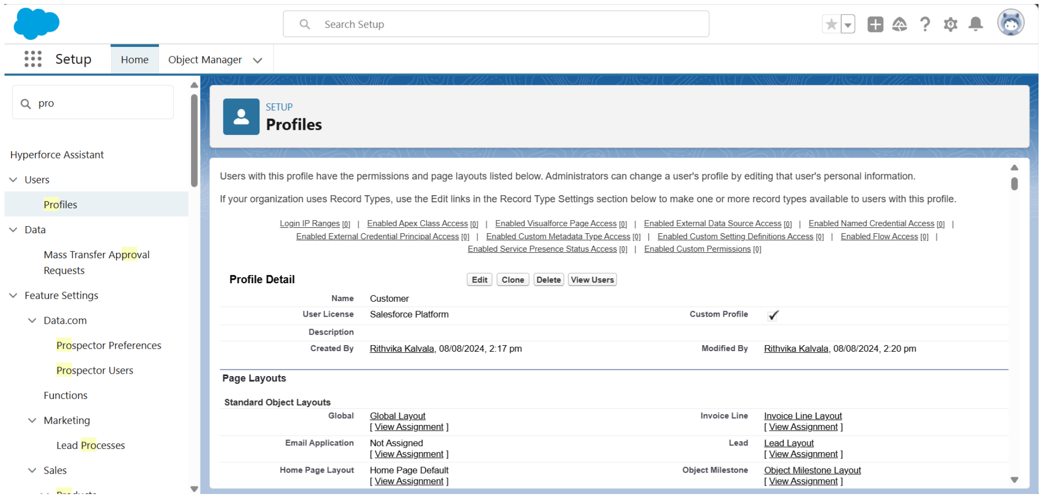
1. From Setup, Go to App Manager and click on New Lightning App and Name it as “Property Details” and add “Customer” and “Property” Object.
2. Click Next and Next then add “System Admin” Profile and Save.



Activity 5: Create Profiles

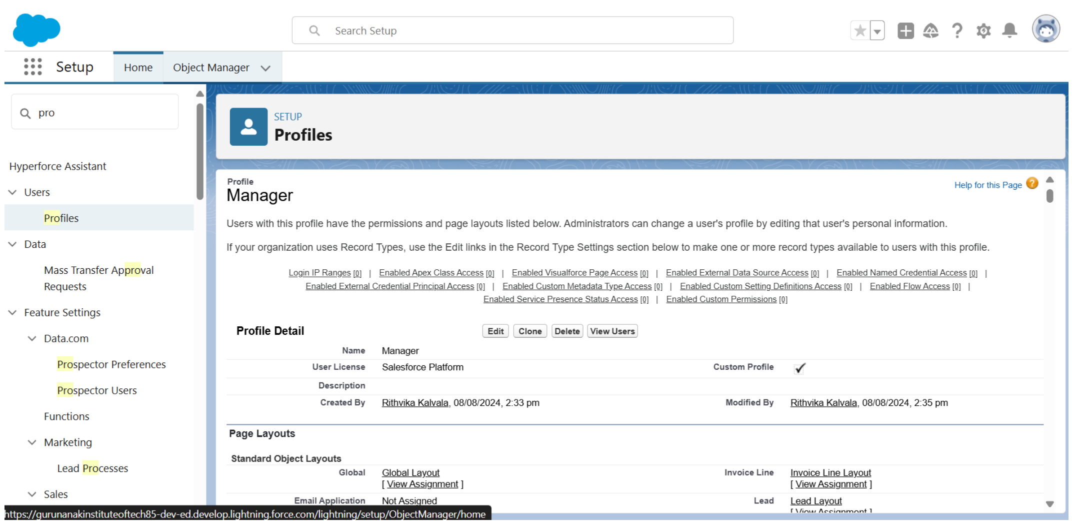
Customer

1. From Setup, Go to Profiles and Clone Salesforce Platform User and Name it “Customer”.
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 read and view all in “Property”.



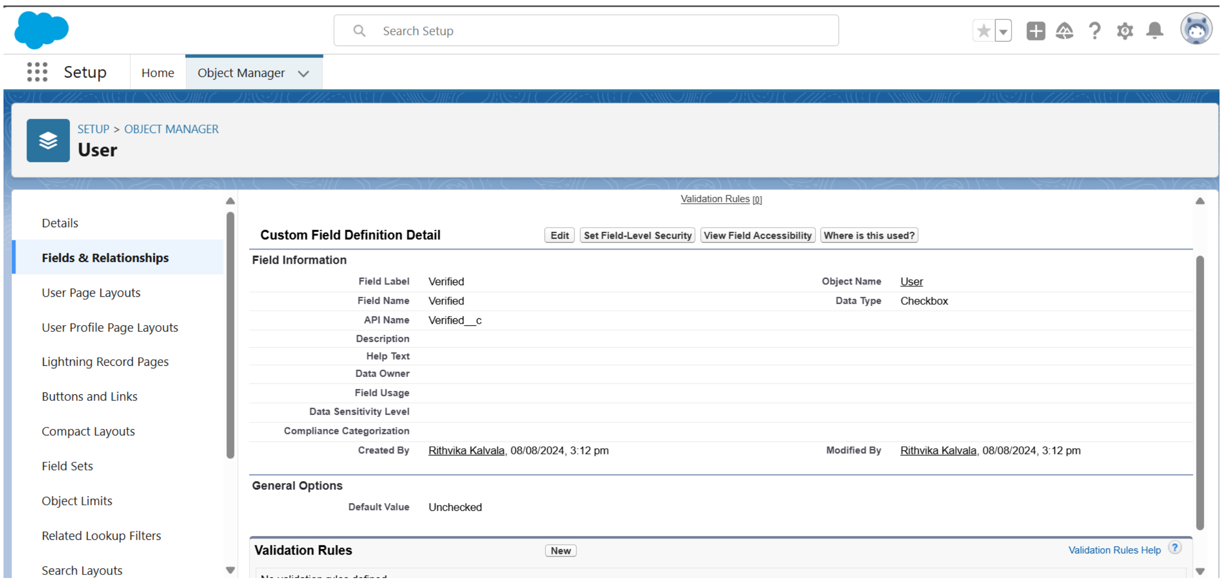
Manager

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”.



Activity 6: Create A Check Box Field on User

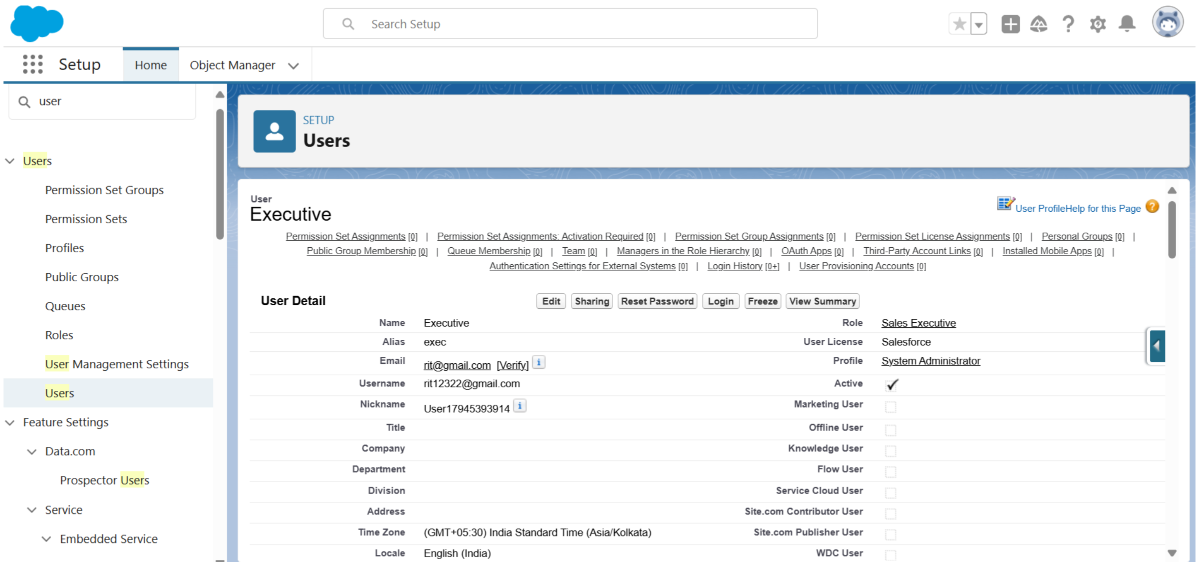
1. Setup go to Object Manager then go to Search for User select Fields and Relationships.
2. Create new Field Named as “Verified” as Data type “Check Box”.



Activity7: Create Users

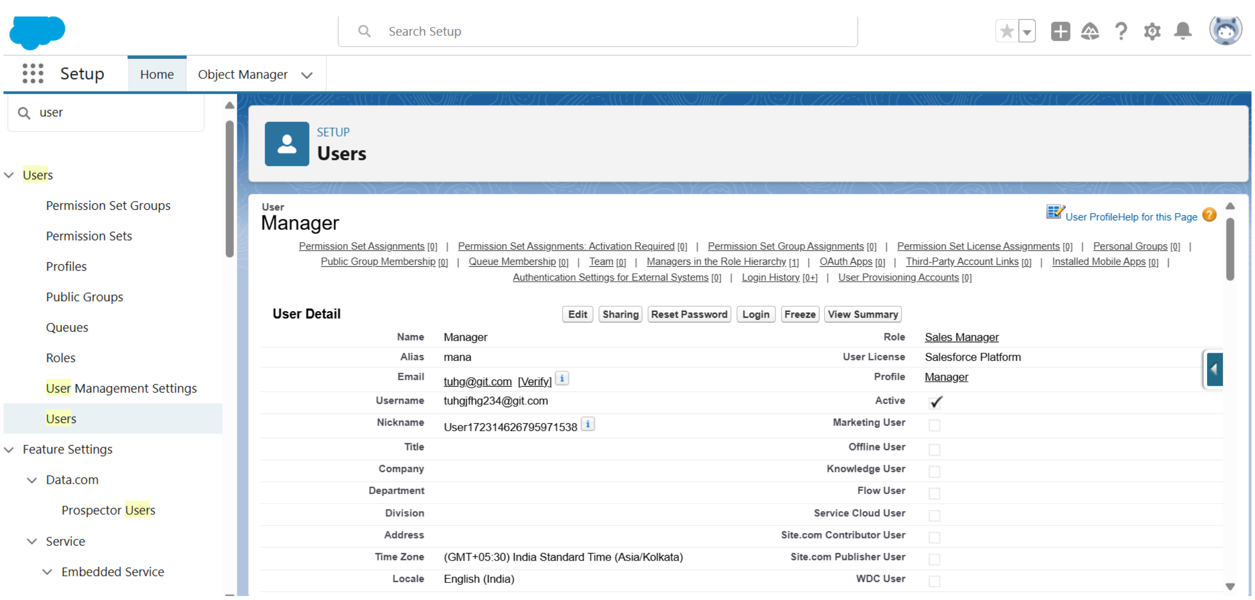
User 1

1. Go to Setup then from Administration select Users then New User.
2. Last Name - Executive
3. Role - Sales Executive
4. License - Salesforce
5. Profile - System Administrator
6. Save



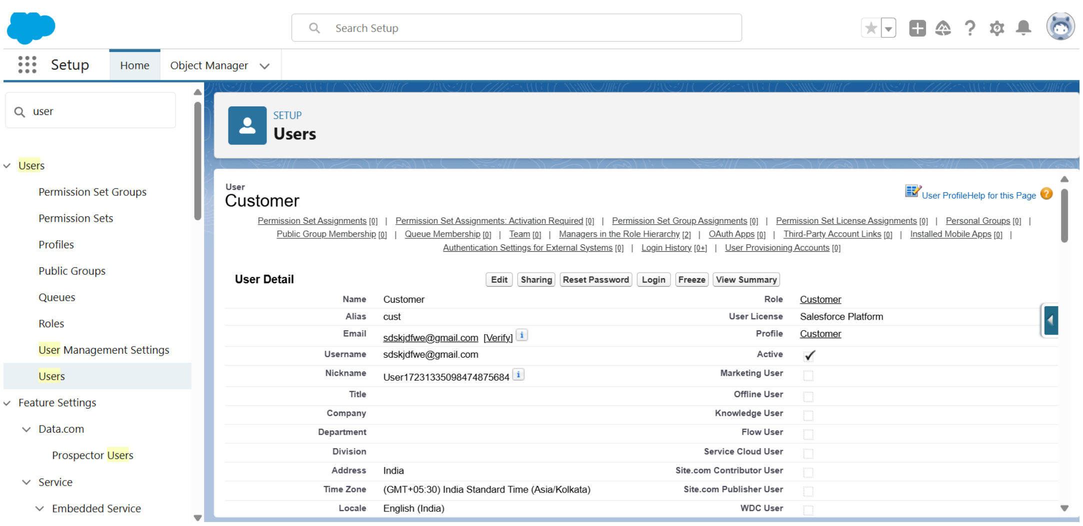
User 2

1. Go to Setup then from Administration select Users then New User.
2. Last Name - Manager
3. Role - Sales Manager
4. License - Salesforce Platform
5. Profile - Manager
6. Save



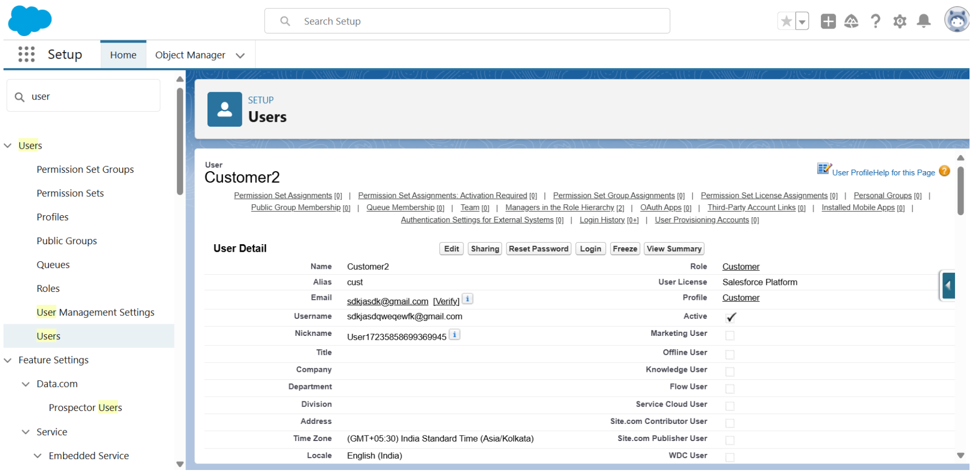
User 3

1. Go to Setup then from Administration select Users then New User.
2. Last Name - Customer
3. Role - Customer
4. License - Salesforce Platform
5. Profile - Customer
6. Make Sure the verified check box is “Unchecked”
7. Save



User 4

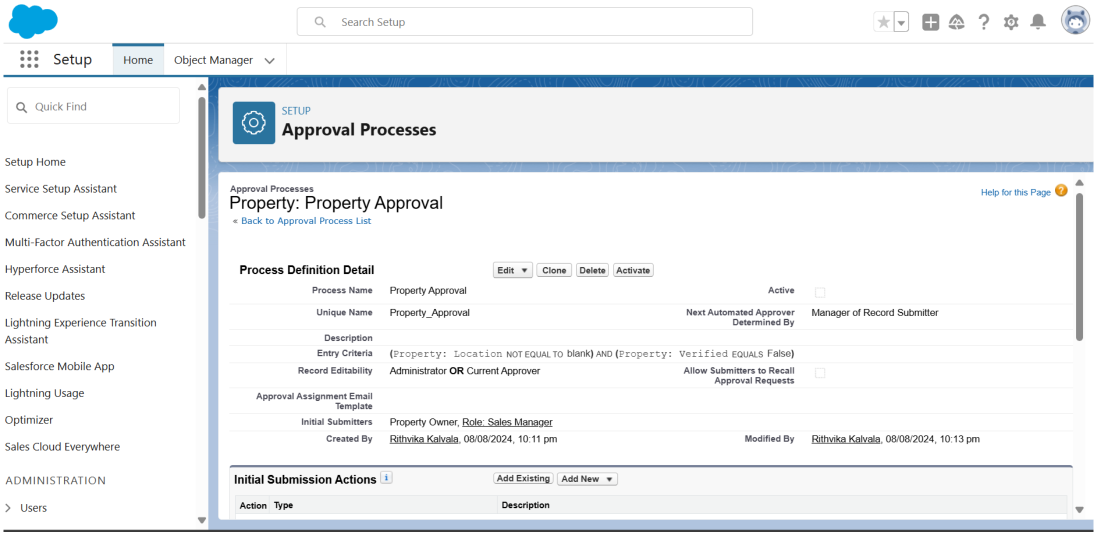
1. Go to Setup then from Administration select Users then New User.
2. Last Name - Customer2
3. Role - Customer
4. License - Salesforce Platform
5. Profile - Customer
6. Make Sure the verified check box is “checked”.
7. Save



Activity 8: Create An Approval Process for Property

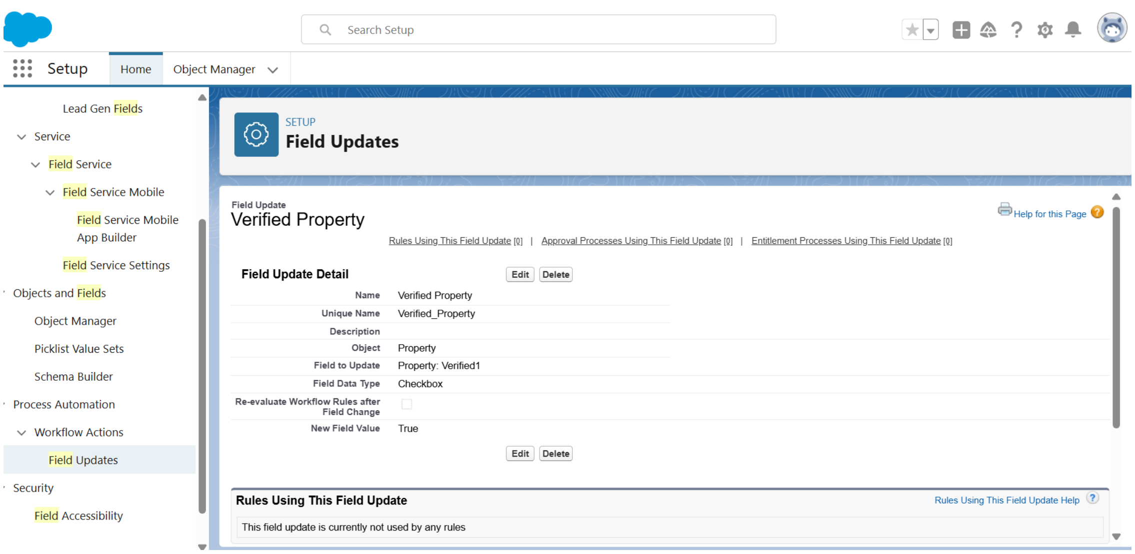
Object

1. From Setup search Process Automation and select Approval Process
2. Process Name - Property Approval
3. Give 2 criteria -
    a. Location is not equal to blank,
    b. Verified Equals false.
4. Click next and "Next Automated Approver Determined By" Select Manager.
5. From Record Editability Properties click on Administrators OR the currently assigned approver can edit records during the approval process.
6. From Step 5, Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.
7. Click Next and Select the Initial Submitters:
    a. Owner - Property Owner
    b. Roles - Sales Manager
8. Save.
9. Add an approval step name "Executive Approval".
10. Specify the Criteria as All record should enter.
11. Click next and select the Approver as "Sales Executive "and "Save".



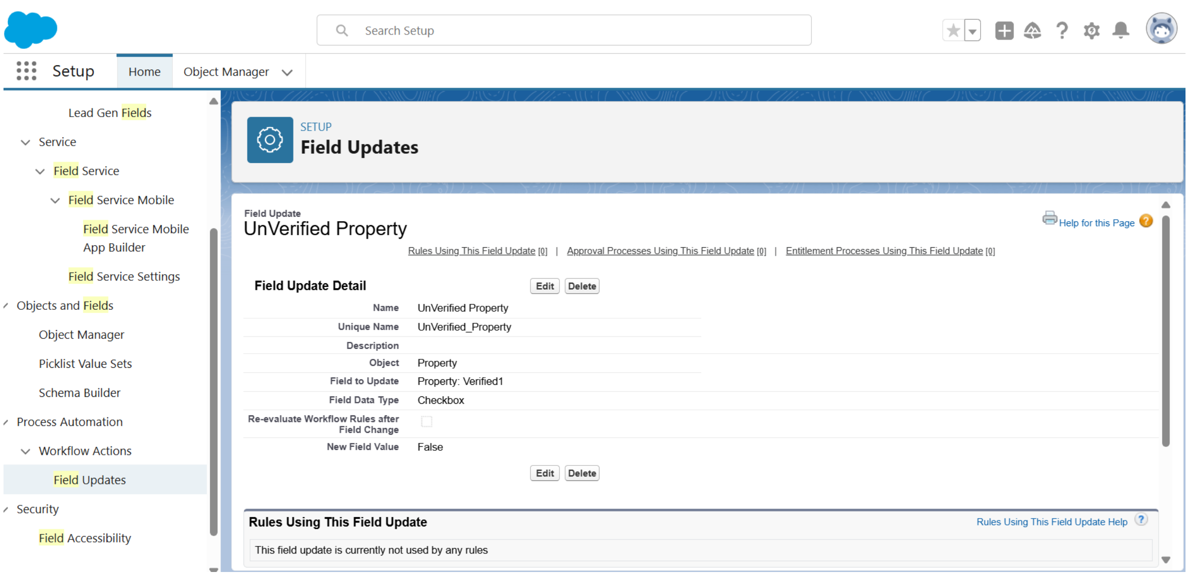
12. Add One field Update as “Verified Property”.

   a. Select Object - Property
   b. Field to Update - Verified
   c. Field Data Type - Checkbox
   d. Select Checkbox Option as “True”
   e. Save.

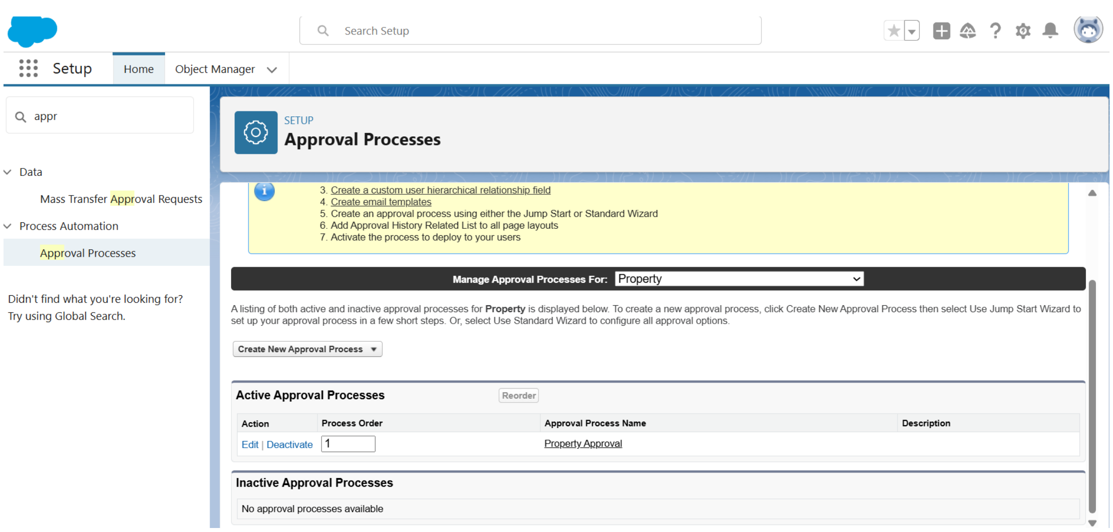


13. Add One field Update as “UnVerified Property”

a. Select Object - Property
b. Field to Update - Verified
c. Field Data Type - Checkbox
d. Select Checkbox Option as “False”
e. Save.

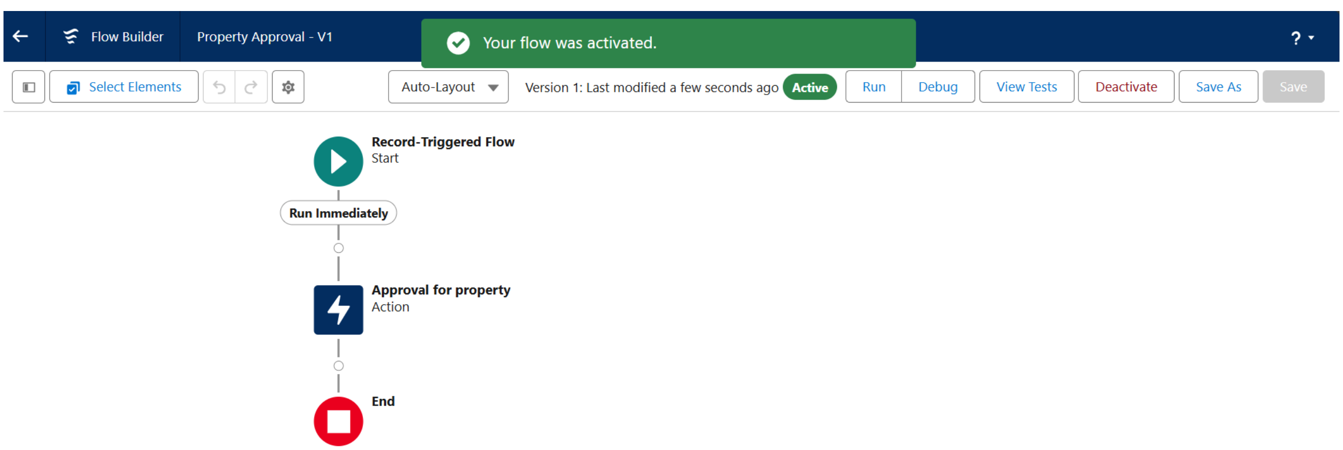


14. Activate the Approval Process.



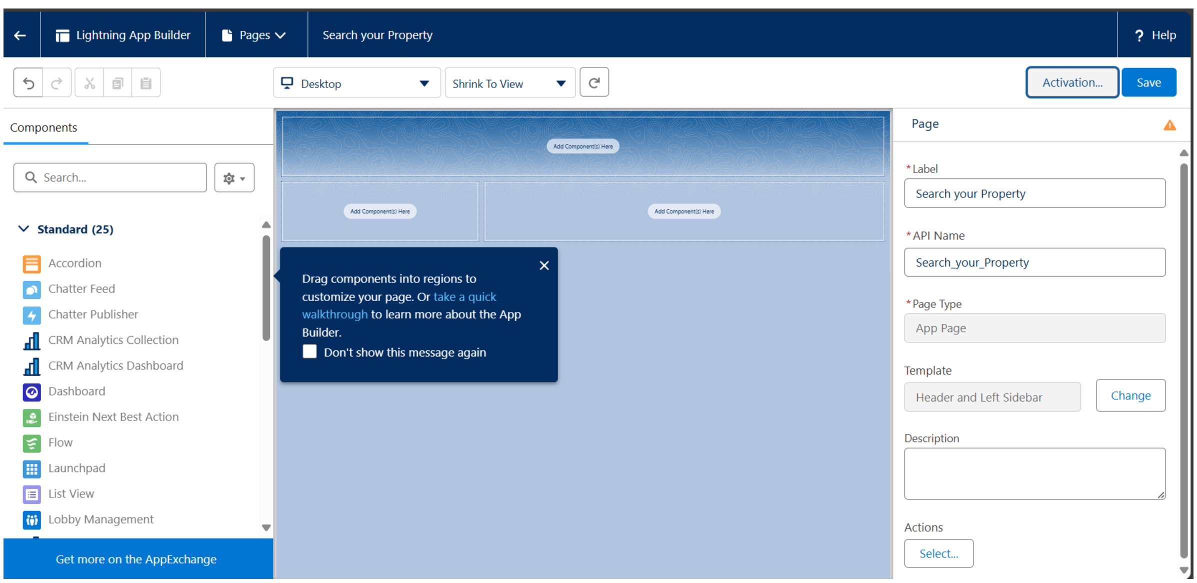
Activity 9: Create A Record Trigger Flow to Submit the Approval Process Automatically

1. From Setup Search for Flows then Click on New and Select “Record Trigger Flow”.
2. Select Object as Property
3. Select “Trigger the flow when” - “A record is created”
4. Set Entry Conditions - “None”
5. Add a “Action” - “Submit for Approval”
6. Give Label - Approval for property
7. Record Id - {!$Record.Id}
8. Done.
9. Save the Flow and Give label as “Property Approval” and “Activate”



Activity 10: Create An App Page

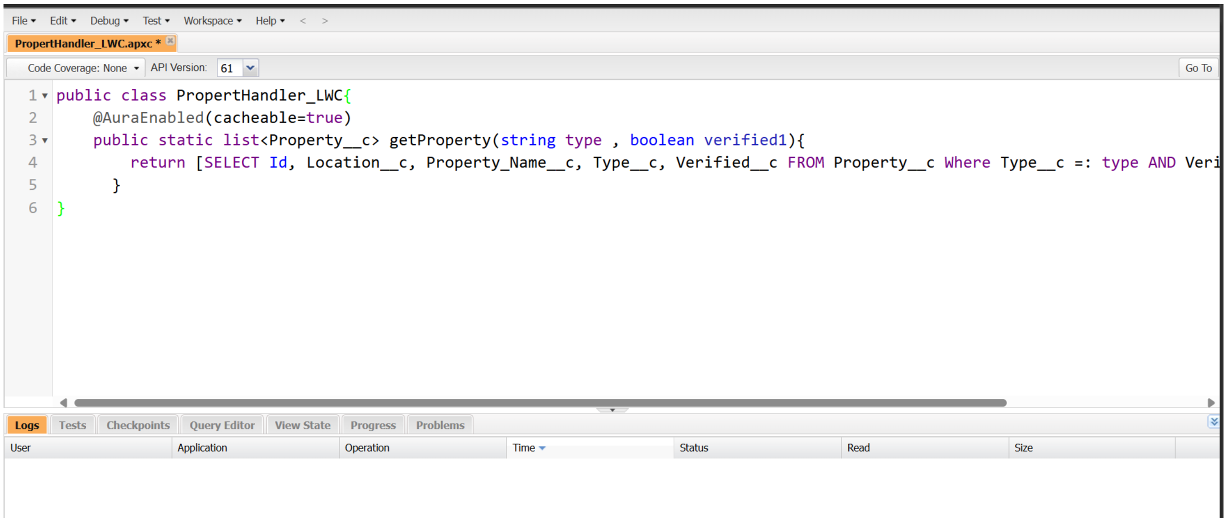
1. From Setup go to Lightning App Builder Then Click on New and Select App Page then Click on Next.
2. Give Label as “Search your Property” click “Next”.
3. Click “Header and Left Sidebar” and click on “Done”
4. Click on “Save” and then click on “Activate”.
5. From Page Setting select page activation as “Activate for all Users”.
6. From Lightning Experience Click on “Property Details” and click on Add Page “.
7. Then Click on “Save”.



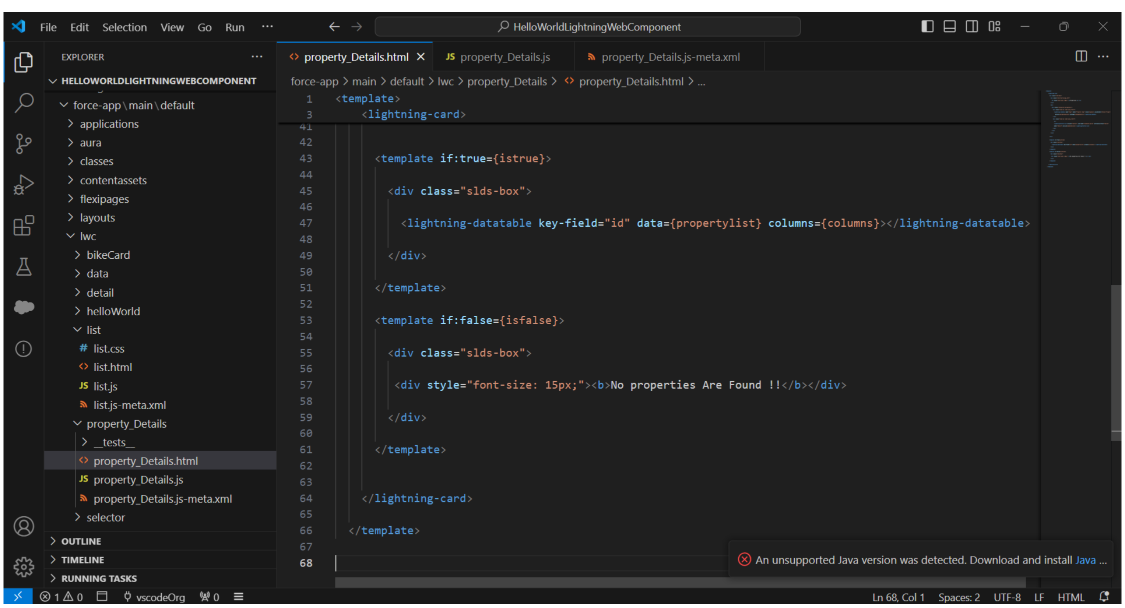
Activity 11: Create A LWC Component

Create an LWC Component 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”.

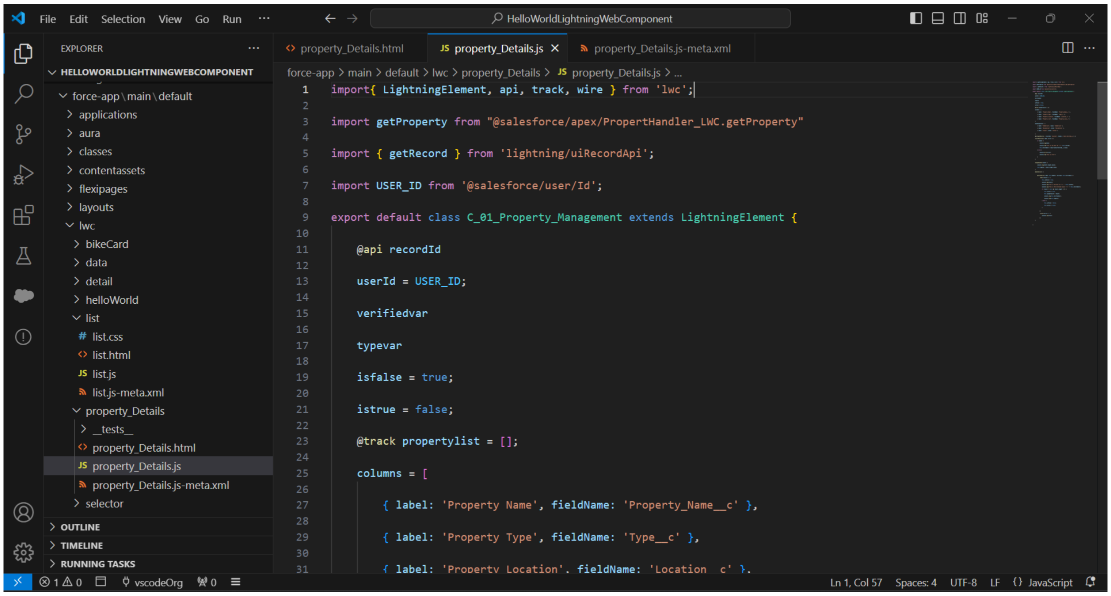
1. Create an Apex Class and make it aura enabled and name it “PropertHandler_LWC”



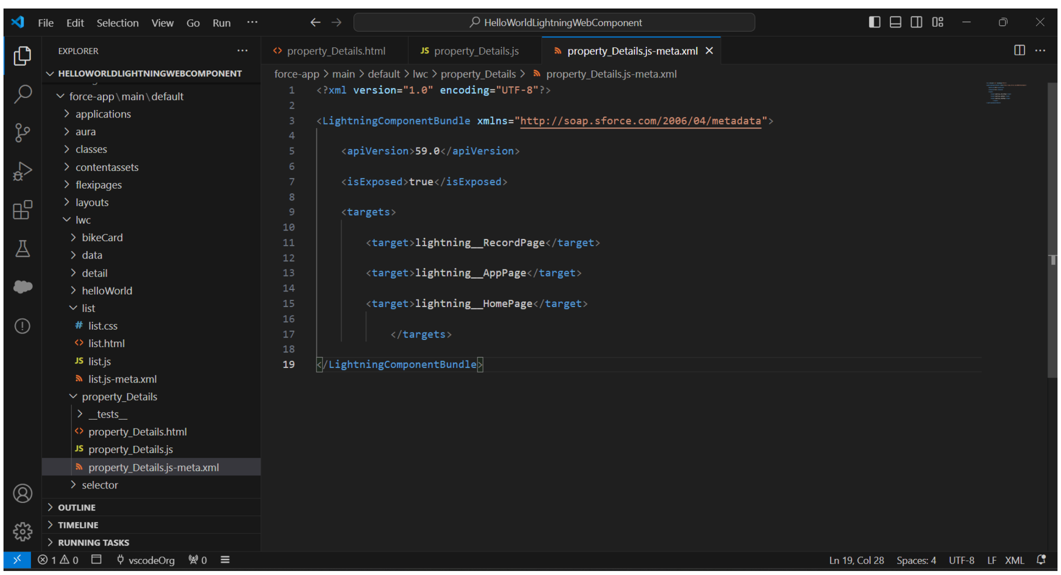
2. Create a Lightning Web Component in your VsCode, and (ctrl+shift +P) and click on authorize an org.
3. Enter your login id and password to authorize your org.
4. Now (ctrl+shift +P) and Create a lightning Web Component and Name it Anything you want to.
5. In your Html File Write this code : -



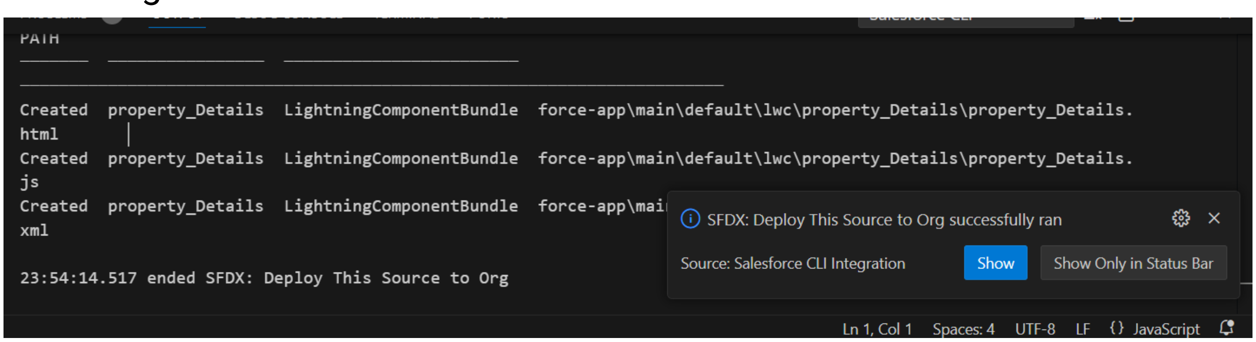
6. In Your Js File Write this code : -



7. In Your metafile give your targets to deploy the component.



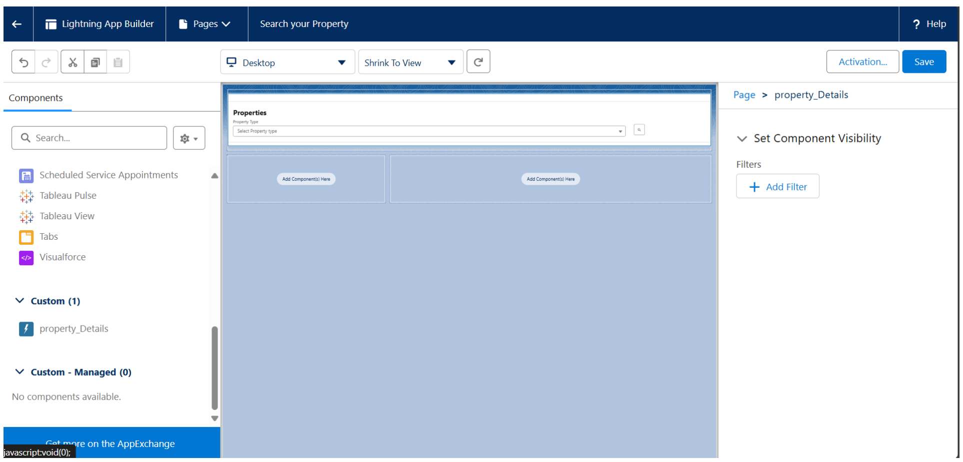
8. After Saving all the three Codes , Right Click and deploy this component to the org.



Activity 12: Drag This Component To Your App Page

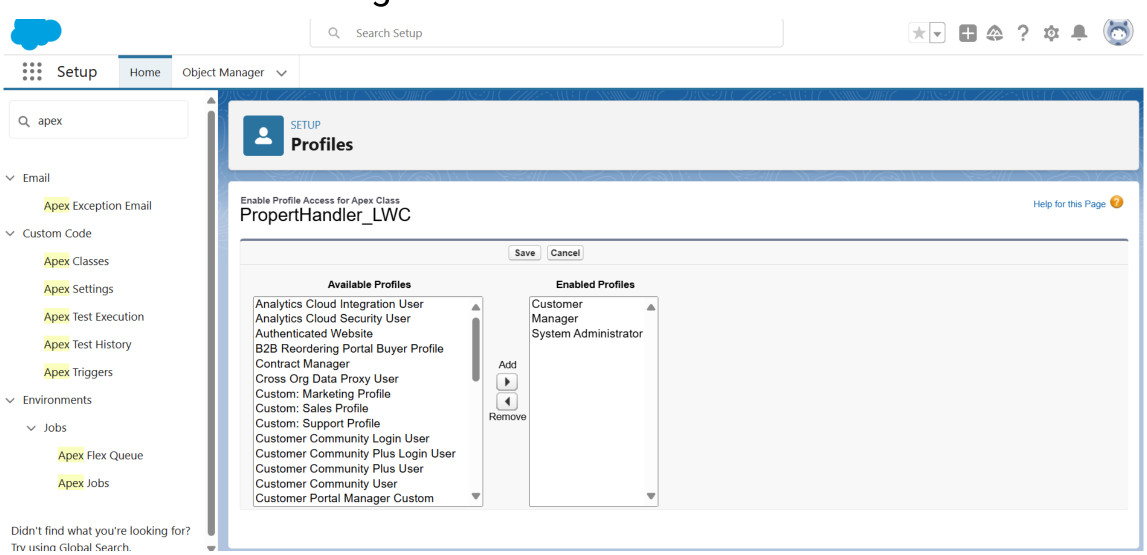
Adding the Component to your Page

1. From Setup go to App Launcher and select Search for Property Details
2. On this Page click on gear icon and click on Edit Page
3. Drag the Component to your App Page and Save the Page.



Activity 13: Give Access of Apex Classes to Profiles

1. From Setup search for Apex Classes and click on “Security” behind “PropertyHandler__LWC”.
2. From Profiles Add “Manager” and “Customer” and “Save”.



Thank you