

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>



Dreams World

Name *

First Name Last Name

Email

example@example.com

Phone Number

Please enter a valid phone number.

Which type of property are you looking for?

☐ Residential
☐ Commercial
☐ Rental

Budget Amount *

Address

Street Address

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

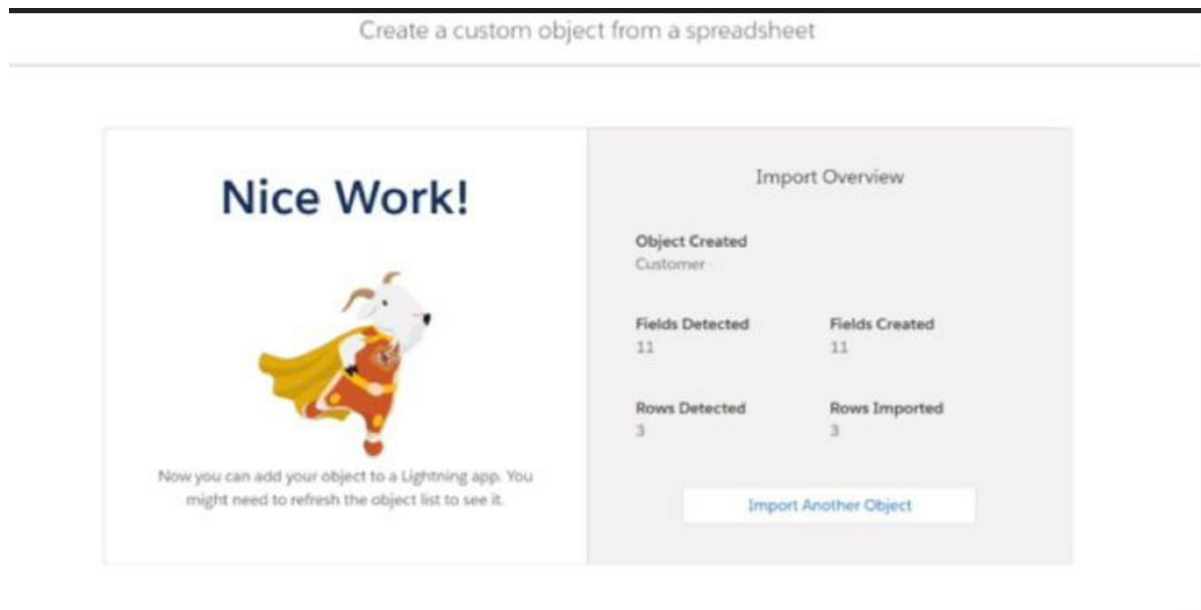
This will redirect you to the salesforce setup page.

Create Customer Object

For creating the customer object follow the steps:

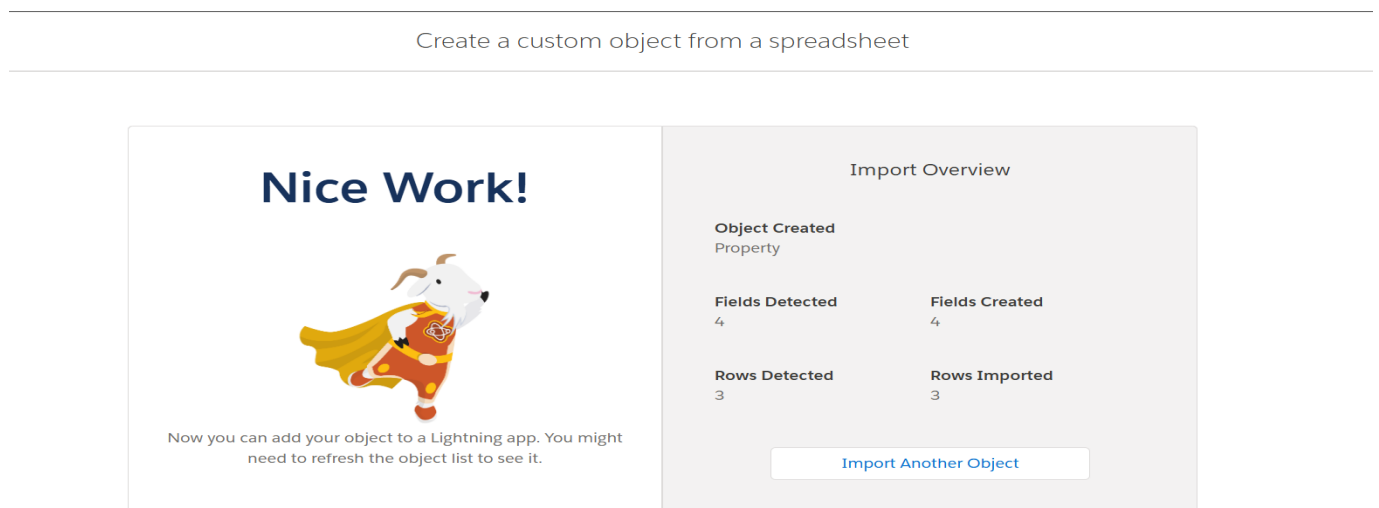
1. Go to the object manager and click on create object from spreadsheet.
2. Download the customer spreadsheet provided Customer
3. After downloading, upload the file and map the fields and upload to

create an object.



Create Property Object

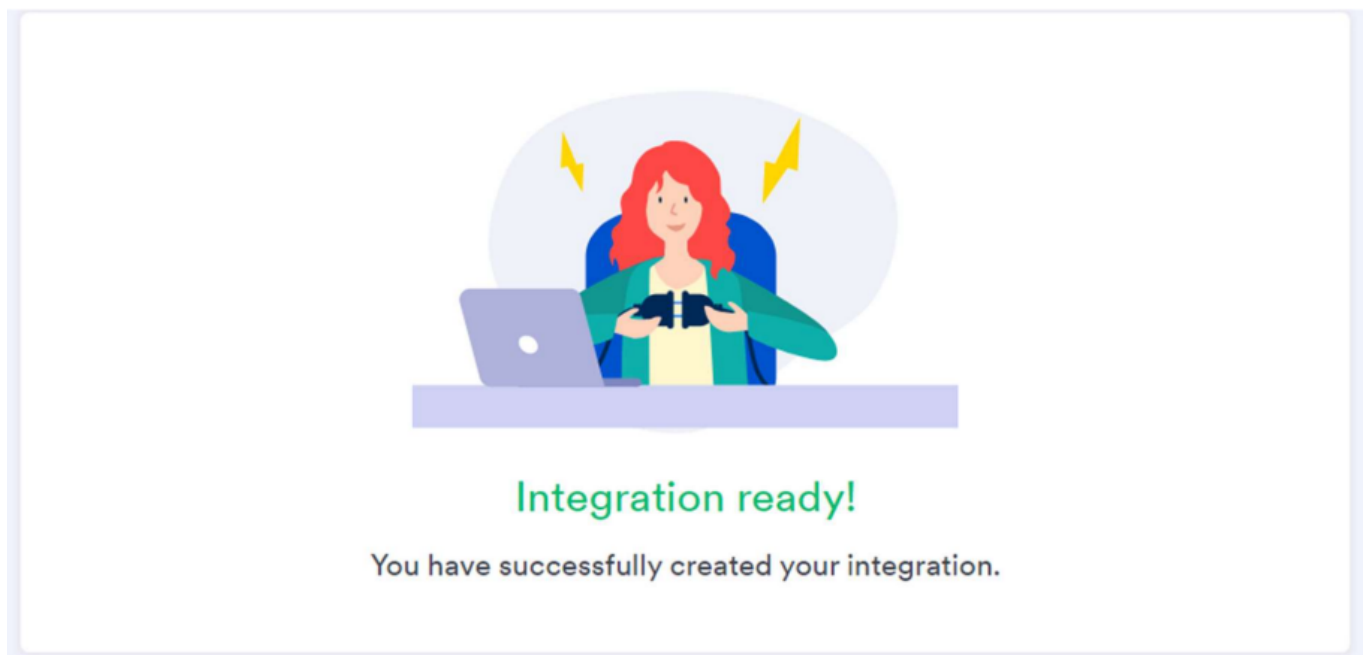
1. Follow the same from creating the Property Object with the Property spreadsheet.



Activity 2: Integrate JotForm with Salesforce Platform

In this Activity we are going to integrate JotForm with Salesforce.

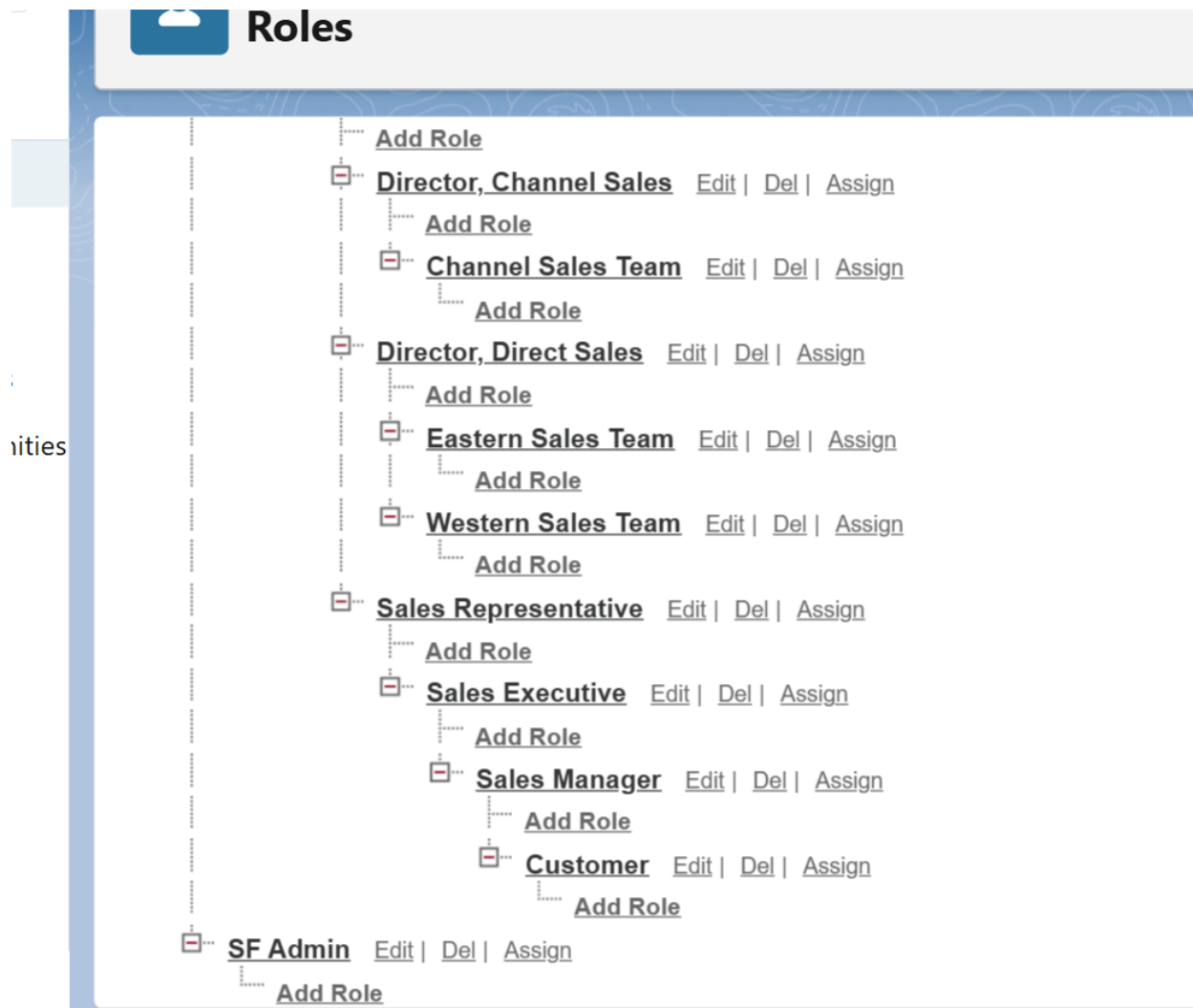
1. On the JotForm Platform, Click on Integration and choose Salesforce.
2. Click on User Integration and choose “Add to Form”.
3. Select the Org with which you want to Integrate your JotForm with.
4. Select an Action.
5. Select a Salesforce Object: - Customer
6. Map Each and every field on the Object 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.

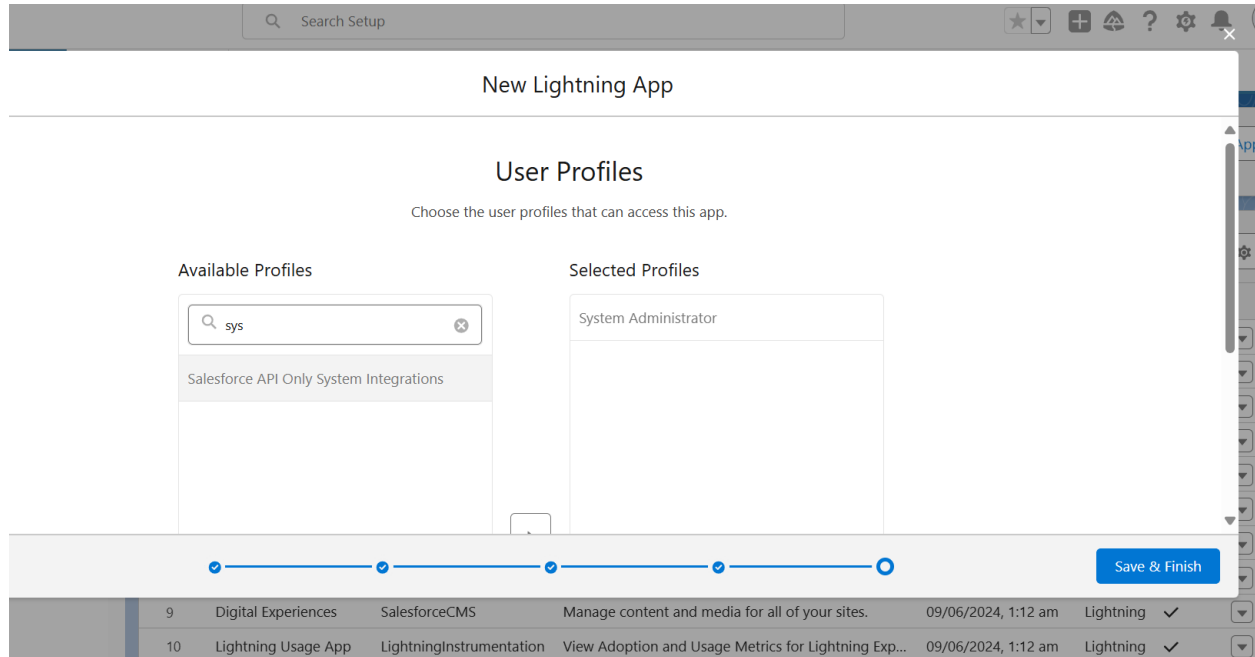
1. Go to Setup and Click on Roles, then click on Expand all and Add a Role just below the Sales Representative.
2. Label - Sales Executive; Reports to - Sales Representative
3. Similarly Create a Role Name “Sales Manager” below Sales Executive which reports to Sales Executive.
4. Similarly Add a Role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

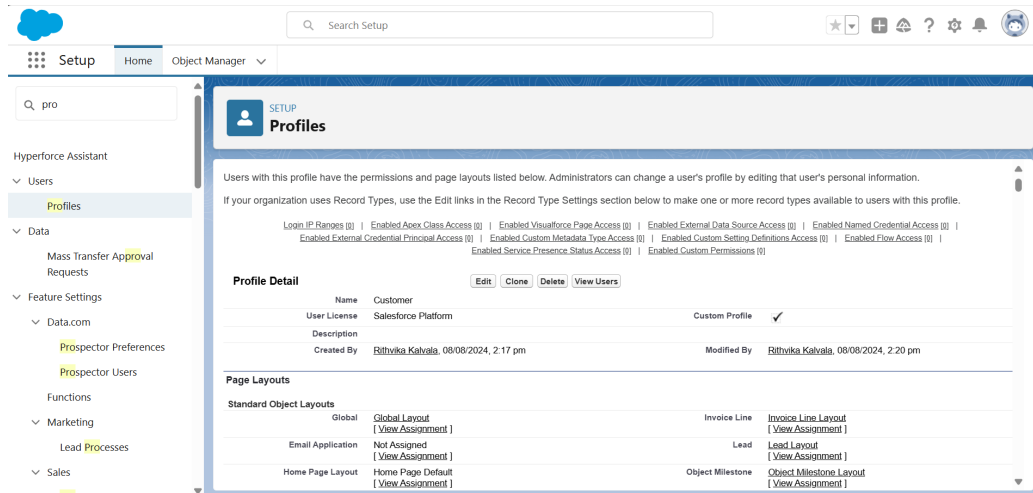
1. From Setup, Go to App Manager and click on New Lightning App and Name it as “Property Details” and add “Customer” and “Property” Object.
2. Click Next and Next then add “System Admin” Profile and Save.



Activity 5: Create Profiles

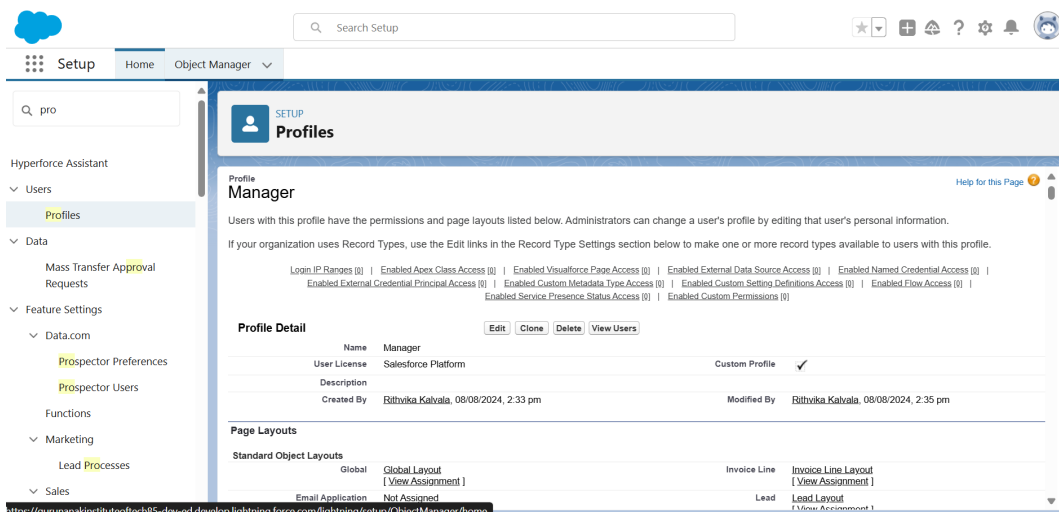
Customer

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".

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the breadcrumb trail reads "Setup > OBJECT MANAGER" and "User". The left sidebar contains a menu with "Details" and "Fields & Relationships" (which is selected). Under "Fields & Relationships", there are links for "User Page Layouts", "User Profile Page Layouts", "Lightning Record Pages", "Buttons and Links", "Compact Layouts", "Field Sets", "Object Limits", "Related Lookup Filters", and "Search Layouts". The main content area is titled "Custom Field Definition Detail" for the "Verified" field on the "User" object. It includes tabs for "Edit", "Set Field-Level Security", "View Field Accessibility", and "Where is this used?". The "Field Information" section displays the following details: Field Label: Verified, Object Name: User, Field Name: Verified, Data Type: Checkbox, API Name: Verified__c, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The "General Options" section shows the Default Value as "Unchecked". The "Validation Rules" section at the bottom has a "New" button and a "Validation Rules Help" link. The page also shows the user "Rithvika Kalvala" as the creator and modifier, with a timestamp of 08/08/2024, 3:12 pm.

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

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

User Executive

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0+) | User Provisioning Accounts (0)

User Detail

Edit | Sharing | Reset Password | Login | Freeze | View Summary

Name	Executive	Role	Sales Executive
Alias	exec	User License	Salesforce
Email	rt@gmail.com (Verify)	Profile	System Administrator
Username	rt12322@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17945393914	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

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

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

User Manager

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (1) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0+) | User Provisioning Accounts (0)

User Detail

Edit | Sharing | Reset Password | Login | Freeze | View Summary

Name	Manager	Role	Sales Manager
Alias	mana	User License	Salesforce Platform
Email	tuhg@oit.com (Verify)	Profile	Manager
Username	tuhgthg234@oit.com	Active	<input checked="" type="checkbox"/>
Nickname	User172314626795971538	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

User 3

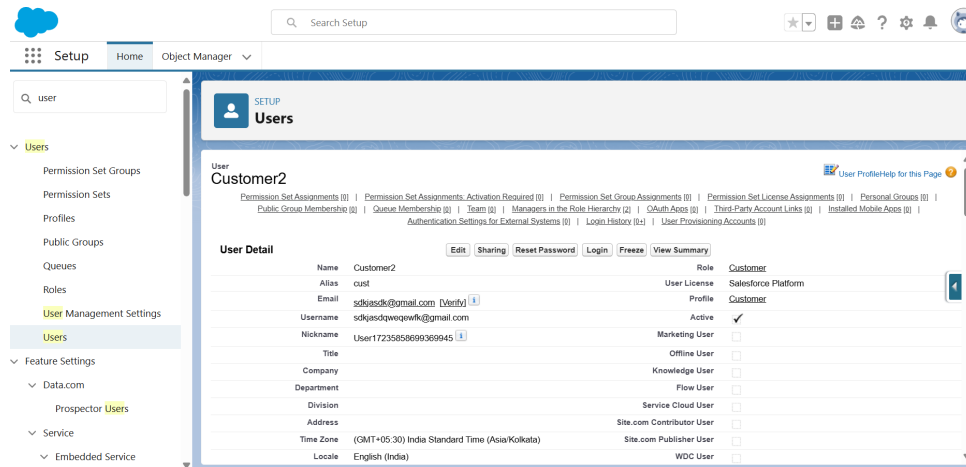
1. Go to Setup then from Administration select Users then New User.
2. Last Name - Customer
3. Role - Customer
4. License - Salesforce Platform
5. Profile - Customer
6. Make Sure the verified check box is "Unchecked"
7. Save

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'User Customer' and includes a 'User Profile Help for this Page' link. Below the title, there are links for 'Permission Set Assignments', 'Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', 'Personal Groups', 'Public Group Memberships', 'Queue Memberships', 'Teams', 'Managers in the Role Hierarchy', 'OAuth Apps', 'Third-Party Account Links', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Login History', and 'User Provisioning Accounts'. The 'User Detail' section includes buttons for 'Edit', 'Sharing', 'Reset Password', 'Login', 'Freeze', and 'View Summary'. The user details are as follows:

Field	Value	Field	Value
Name	Customer	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	sdsjkdwa@gmail.com [Verify]	Profile	Customer
Username	sdsjkdwa@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17231335098474875684	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

User 4

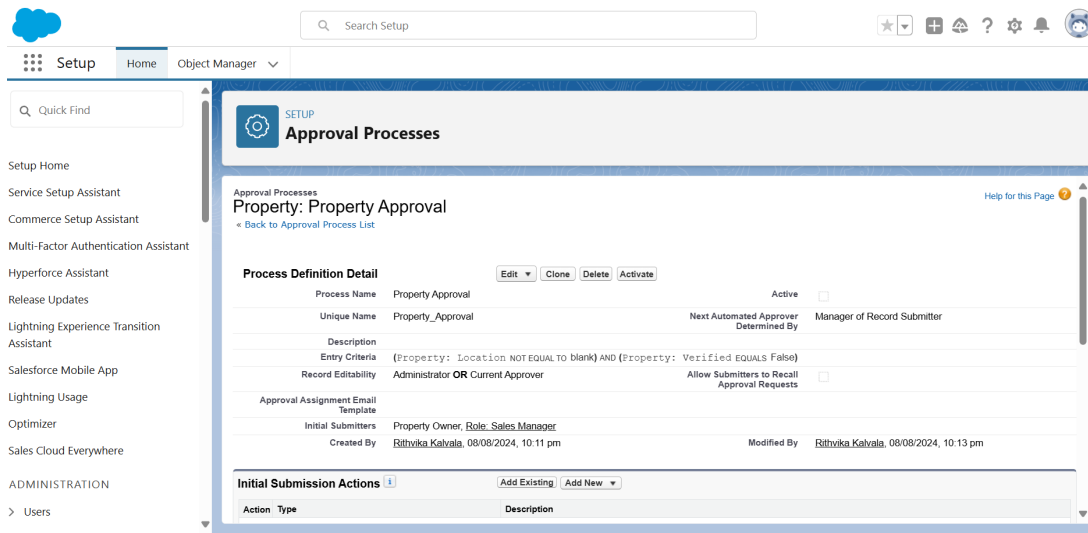
1. Go to Setup then from Administration select Users then New User.
2. Last Name - Customer2
3. Role - Customer
4. License - Salesforce Platform
5. Profile - Customer
6. Make Sure the verified check box is "checked".
7. Save



Activity 8: Create An Approval Process for Property

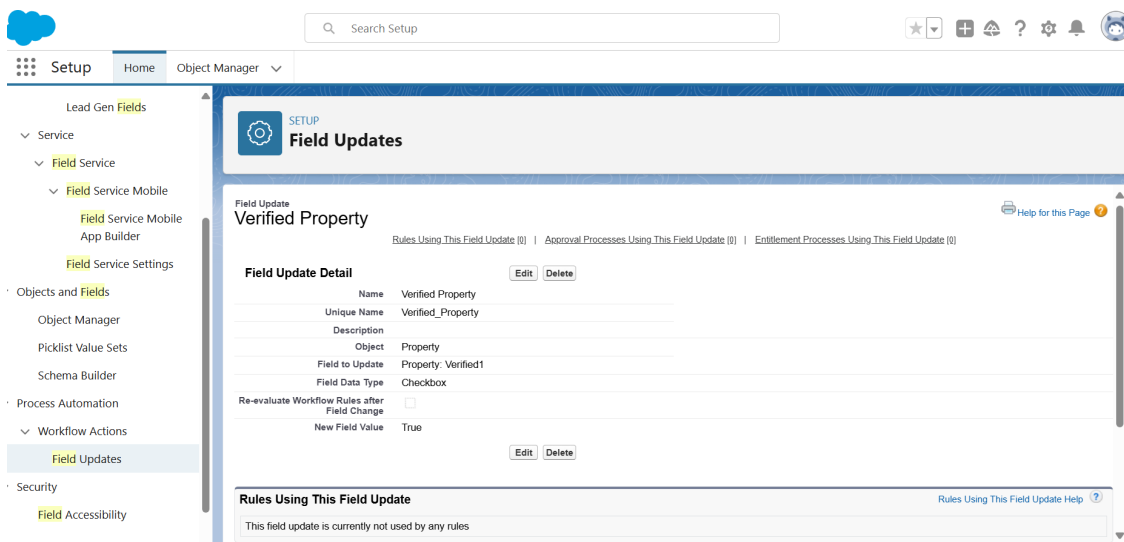
Object

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”.

- Select Object - Property
- Field to Update - Verified
- Field Data Type - Checkbox
- Select Checkbox Option as “True”
- Save.



13. Add One field Update as “UnVerified Property”
- Select Object - Property
 - Field to Update - Verified
 - Field Data Type - Checkbox
 - Select Checkbox Option as “False”
 - Save.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like Setup, Home, Object Manager, and Field Updates. The main content area is titled 'Field Updates' and shows a 'Field Update' named 'UnVerified Property'. The 'Field Update Detail' section includes fields for Name, Unique Name, Description, Object, Field to Update, Field Data Type, Re-evaluate Workflow Rules after Field Change, and New Field Value. The 'Rules Using This Field Update' section shows that this field update is currently not used by any rules.

Field Update: UnVerified Property

Rules Using This Field Update (0) | Approval Processes Using This Field Update (0) | Entitlement Processes Using This Field Update (0)

Field Update Detail

Name	UnVerified Property
Unique Name	UnVerified_Property
Description	
Object	Property
Field to Update	Property: Verified1
Field Data Type	Checkbox
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	False

Rules Using This Field Update

This field update is currently not used by any rules

14. Activate the Approval Process.

The screenshot shows the Salesforce Setup interface for Approval Processes. The left sidebar contains a navigation menu with categories like Setup, Home, Object Manager, and Approval Processes. The main content area is titled 'Approval Processes' and shows a list of active and inactive approval processes for the 'Property' object. The 'Active Approval Processes' section shows a table with columns for Action, Process Order, Approval Process Name, and Description. The 'Inactive Approval Processes' section shows that no approval processes are available.

Approval Processes

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.

Active Approval Processes

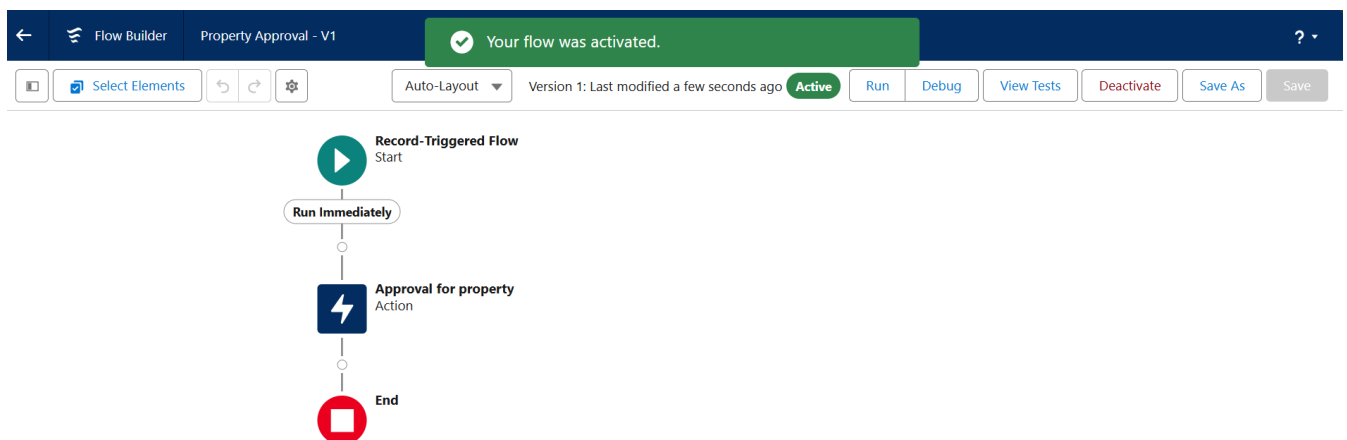
Action	Process Order	Approval Process Name	Description
Edit Deactivate	1	Property Approval	

Inactive Approval Processes

No approval processes available

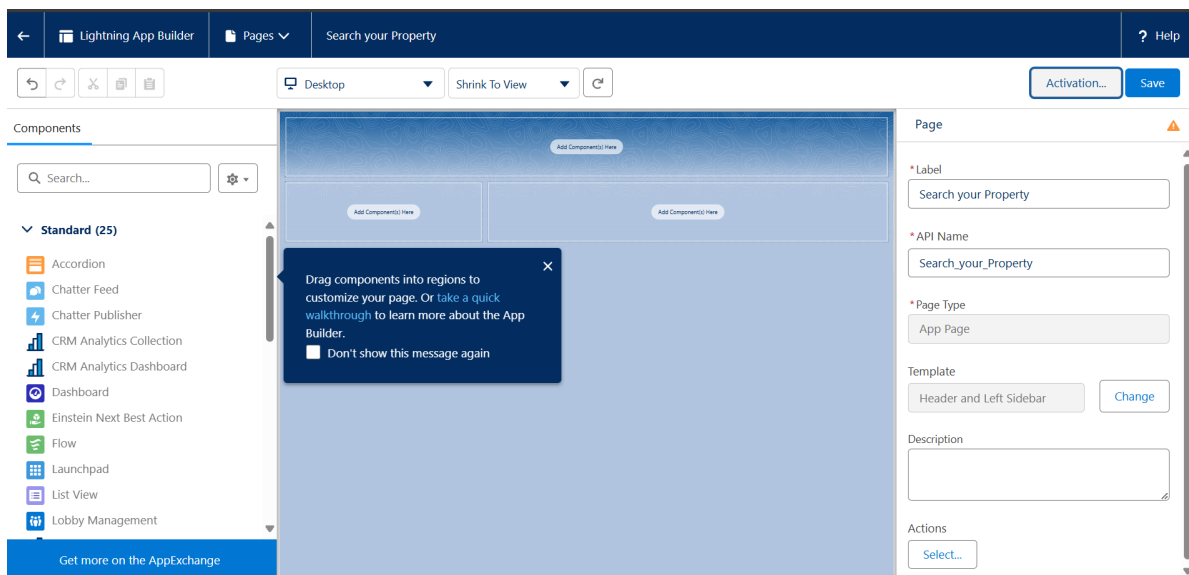
Activity 9: Create A Record Trigger Flow to Submit the Approval Process Automatically

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

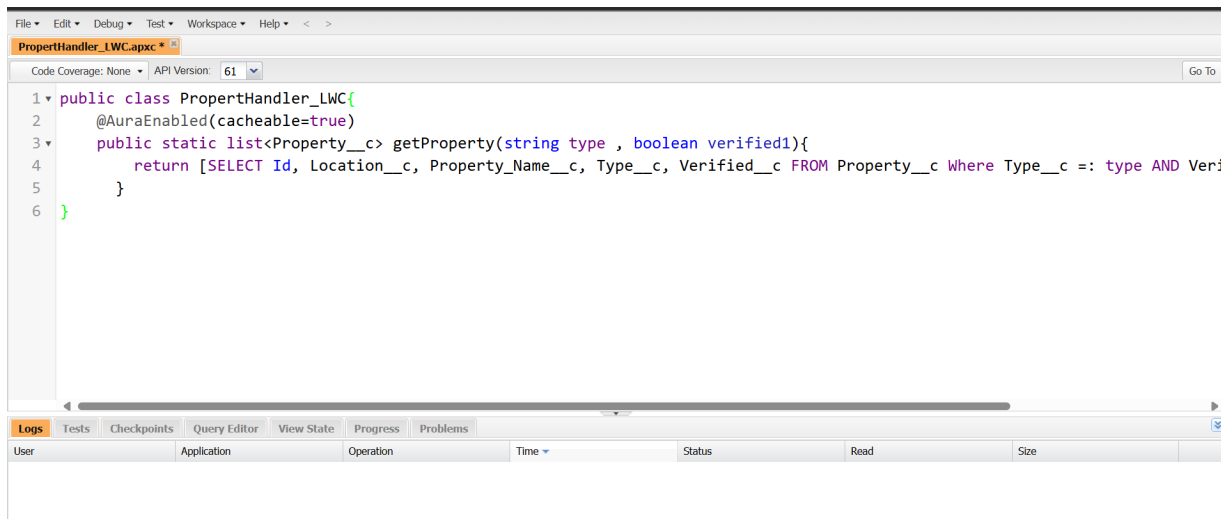
1. From Setup go to Lightning App Builder Then Click on New and Select App Page then Click on Next.
2. Give Label as “Search your Property” click “Next”.
3. Click “Header and Left Sidebar” and click on “Done”
4. Click on “Save” and then click on “Activate”.
5. From Page Setting select page activation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

A screenshot of the Visual Studio Code editor showing an Apex class named 'PropertHandler_LWC.apxc'. The class is marked as '@AuraEnabled(cacheable=true)'. It contains a static method 'getProperty' that takes 'string type' and 'boolean verified1' as parameters and returns a list of 'Property__c' objects. The SQL query in the method is: 'SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM Property__c Where Type__c =: type AND Verified__c =: verified1'. The bottom of the editor shows a table with columns: User, Application, Operation, Time, Status, Read, and Size.

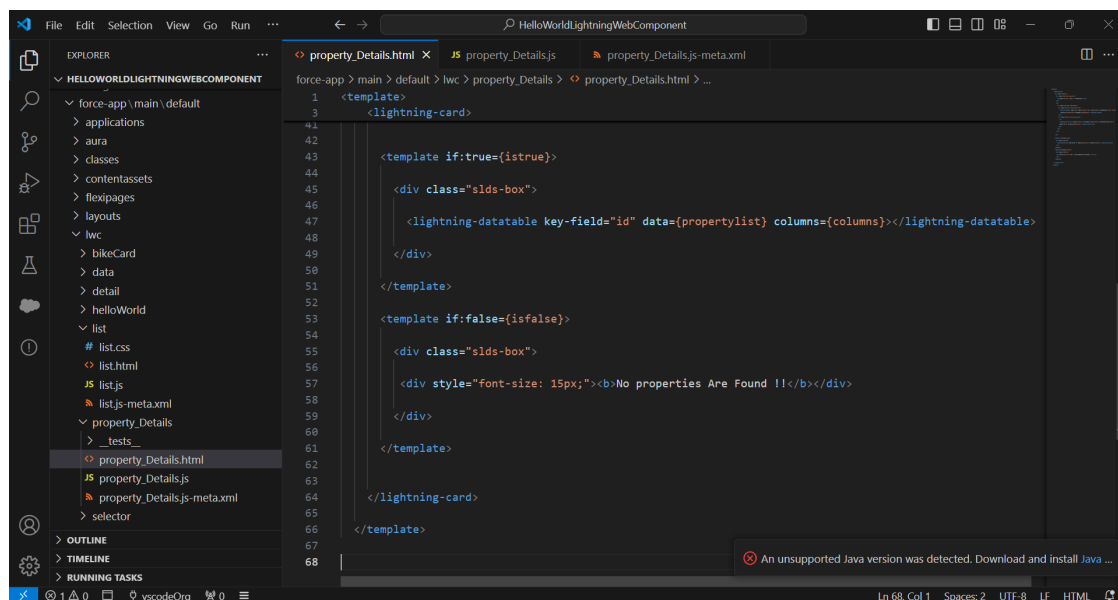
```
1 public class PropertHandler_LWC{
2     @AuraEnabled(cacheable=true)
3     public static list<Property__c> getProperty(string type , boolean verified1){
4         return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM Property__c Where Type__c =: type AND Verified__c =: verified1];
5     }
6 }
```

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.

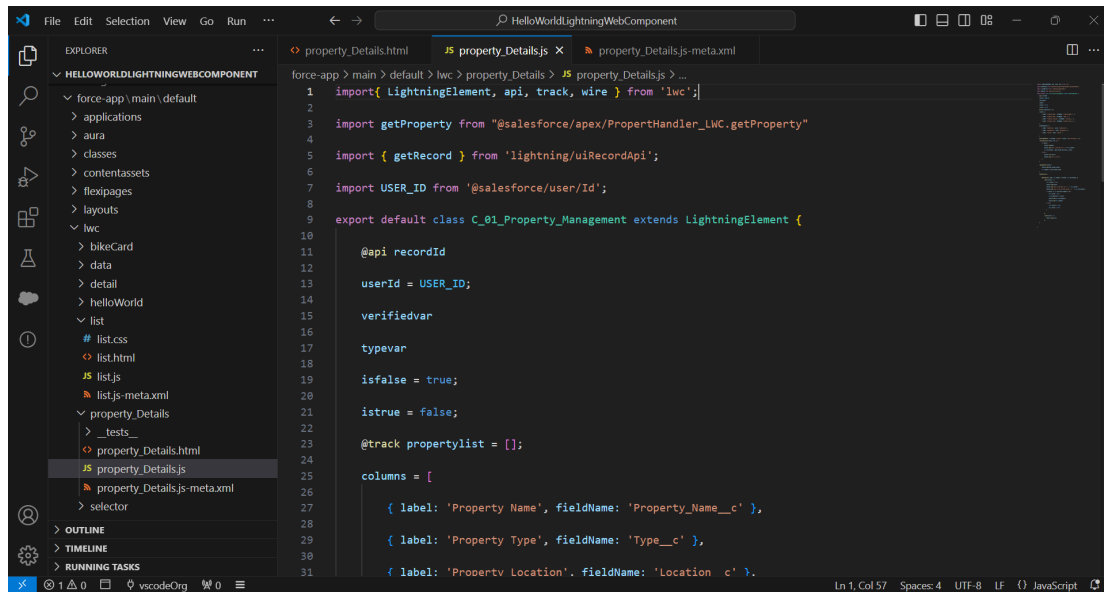
4. Now (ctrl+shift +P) and Create a lightning Web Component and Name it Anything you want to.

5. In your Html File Write this code :-

A screenshot of the Visual Studio Code editor showing a Lightning Web Component named 'HelloWorldLightningWebComponent'. The 'property_Details.html' file is open, displaying a template with a lightning-card and a lightning-datatable. The template includes a conditional rendering block for 'istrue' and 'isfalse'. The 'istrue' block contains a lightning-datatable with 'key-field="id"' and 'data={propertylist}'. The 'isfalse' block contains a div with the text 'No properties Are Found !!'. The bottom of the editor shows a status bar with 'Ln 68, Col 1' and 'Spaces: 2 UTF-8 LF HTML'.

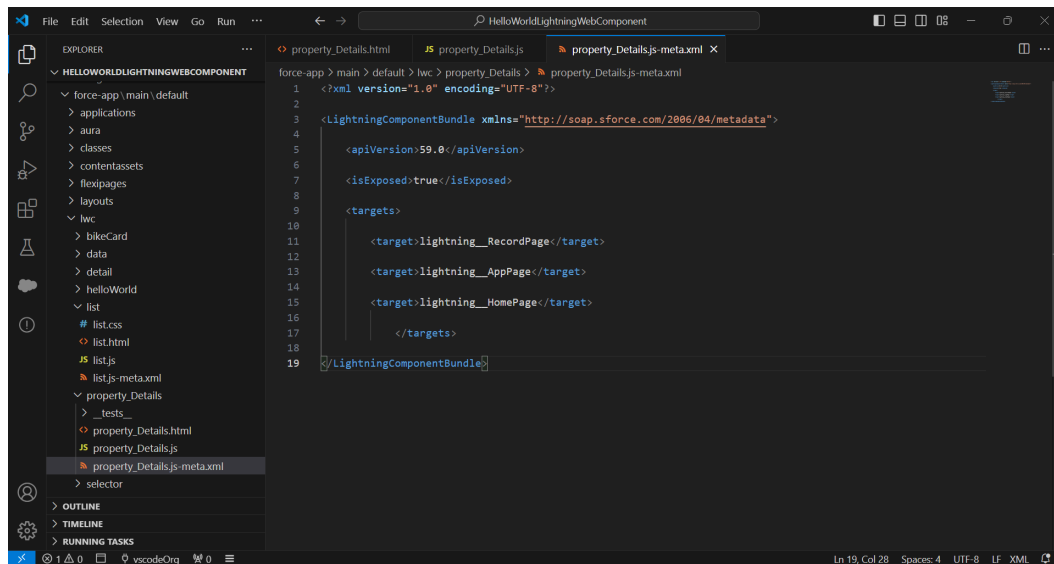
```
1 <template>
2   <lightning-card>
3
4
5   <template if:true={istrue}>
6
7     <div class="slds-box">
8
9       <lightning-datatable key-field="id" data={propertylist} columns={columns}></lightning-datatable>
10
11     </div>
12   </template>
13
14   <template if:false={isfalse}>
15
16     <div class="slds-box">
17
18       <div style="font-size: 15px;"><b>No properties Are Found !!</b></div>
19
20     </div>
21   </template>
22 </lightning-card>
23 </template>
```

6. In Your Js File Write this code :-



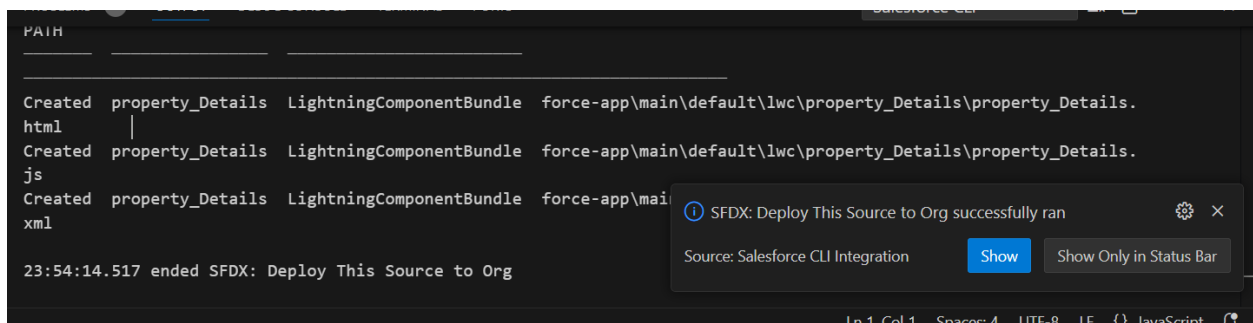
```
1 import { LightningElement, api, track, wire } from 'lwc';
2
3 import { getProperty } from '@salesforce/apex/PropertyHandler_LWC.getProperty';
4
5 import { getRecord } from 'lightning/uiRecordApi';
6
7 import USER_ID from '@salesforce/user/Id';
8
9 export default class C_01_Property_Management extends LightningElement {
10
11     @api recordId
12
13     userId = USER_ID;
14
15     verifiedvar
16
17     typevar
18
19     isfalse = true;
20
21     istrue = false;
22
23     @track propertylist = [];
24
25     columns = [
26
27         { label: 'Property Name', fieldName: 'Property_Name__c' },
28
29         { label: 'Property Type', fieldName: 'Type__c' },
30
31         { label: 'Property Location', fieldName: 'Location__c' },
```

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



```
1 <?xml version="1.0" encoding="UTF-8"?>
2
3 <LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
4
5     <apiVersion>59.0</apiVersion>
6
7     <isExposed>true</isExposed>
8
9     <targets>
10
11         <target>lightning__RecordPage</target>
12
13         <target>lightning__AppPage</target>
14
15         <target>lightning__HomePage</target>
16
17     </targets>
18
19 </LightningComponentBundle>
```

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



```
PATH
-----
Created property_Details LightningComponentBundle force-app\main\default\lwc\property_Details\property_Details.html
Created property_Details LightningComponentBundle force-app\main\default\lwc\property_Details\property_Details.js
Created property_Details LightningComponentBundle force-app\main\default\lwc\property_Details\property_Details.xml
23:54:14.517 ended SFDX: Deploy This Source to Org
```

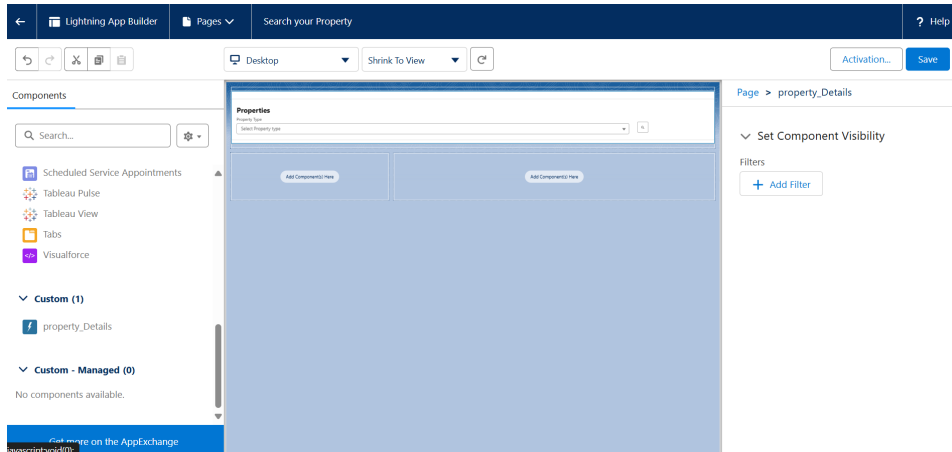
SFDX: Deploy This Source to Org successfully ran

Source: Salesforce CLI Integration [Show] [Show Only in Status Bar]

Activity 12: Drag This Component To Your App Page

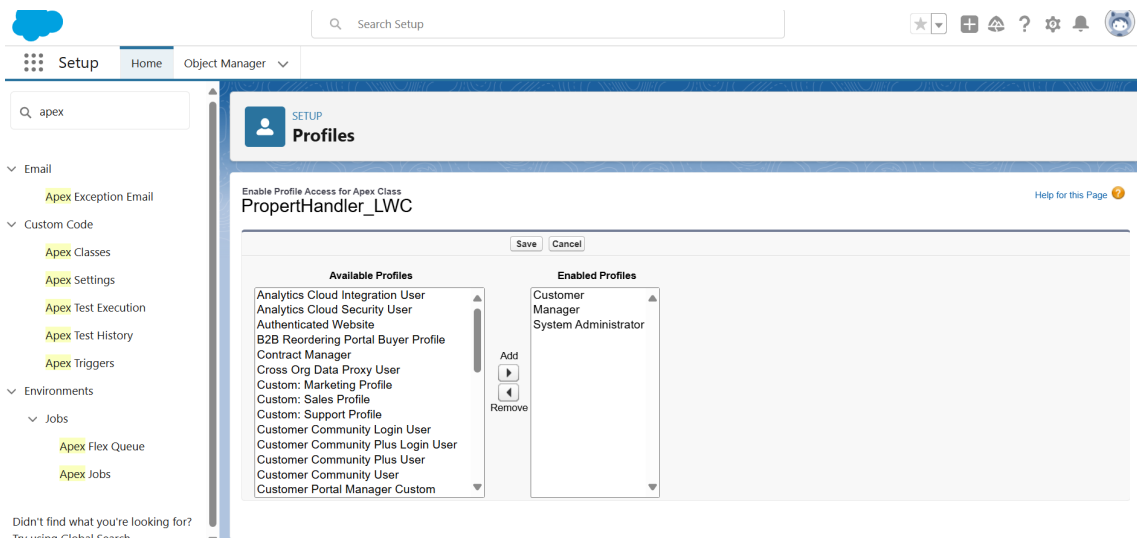
Adding the Component to your Page

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