

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 comprehensive Customer Relationship Management (CRM) application within Salesforce to enhance the management of clients and their property-related requirements. The primary objective is to streamline the processes involved in tracking client interactions, property details and overall relationship management. By leveraging Salesforce's robust tools and customization capabilities, the project seeks to improve customer engagement, optimize property management, and drive business growth for real estate professionals.

The project involves creating a Form using JotForm and integrating it with Salesforce to automatically create customer records, creating objects from a spreadsheet, defining roles and profiles, developing a property details app, and setting up an approval process for property objects. Additionally, the project includes creating an app page with a Lightning Web Component (LWC) and providing profile access to Apex classes.

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INTRODUCTION:

The CRM application aims to streamline the management of clients and their property requirements. It integrates various tools and technologies to automate processes, enhance data management, and improve user experience. This project will guide through the steps of setting up and configuring the CRM application, ensuring efficient and automated handling of customer records and property details.

In the real estate industry, managing a large number of client interactions and property details can be a daunting task. Real estate professionals often juggle multiple responsibilities, from tracking prospective buyers and sellers to managing extensive property listings and coordinating transactions. Traditional methods of managing these tasks can be inefficient and prone to errors, leading to lost opportunities and decreased customer satisfaction.

To address these challenges, our CRM application leverages Salesforce's powerful customization capabilities to create a tailored solution for real estate professionals. The application will provide a centralized platform for managing client information, property listings, and interactions, enabling users to easily access and update records. Automated workflows will streamline routine tasks such as follow-up communications, appointment scheduling, and transaction management, freeing up valuable time for real estate professionals to focus on building relationships and closing deals.

Task1: Create a Jotform and integrate it with the org to create a record of customers automatically

1. Create a JotForm:

- Design a form to capture customer details such as Name,Phone,Email,Address,and type of property
- Save the form and get the form URL.

2. Integrate JotForm with Salesforce:

- Navigate to the JotForm integration settings.
- Select Salesforce and authenticate with your Salesforce credentials.
- Select the action (create records) and the object.
- Map Each and every field on the Object with the fields on the form.
- Save the integration settings.

3. Verification:

- Submit a test form entry.
- Check Salesforce to ensure the customer record is created automatically.

Screenshots of task1:

Form

Name

First Name

Last Name

Phone Number

Please enter a valid phone number.

Email

example@example.com

Address

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

Submit

Create a record

Send data from form fields to matched Salesforce fields

Object Fields	Form
Name	Name
City	Address - City
Phone Number	Phone Number
Street Address	Address - Street Address
Email	Email
State	Address - State
Street Address line 2	Address - Street Address 2
postal code	Address - Postal/Zip Code

+ Add Field

Task 2 : Create Objects from Spreadsheet

1. create spreadsheet(if not provided)

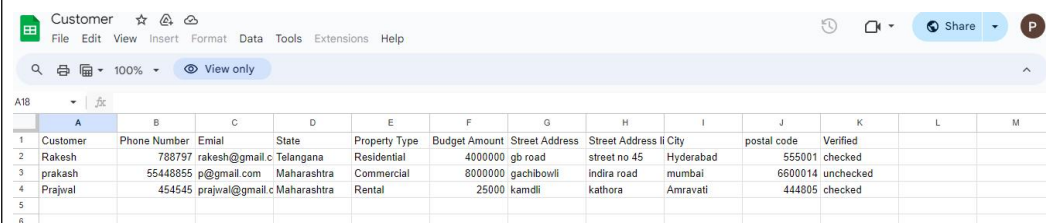
- Create spreadsheet with the necessary columns for customer and property details.
- Save the spreadsheet in CSV format.

2.Use spreadsheet to create objects (if provided)

- Download the spreadsheet.
- Upload the downloaded file to the salesforce.
- map the fields and upload.

Screenshots of Task2:

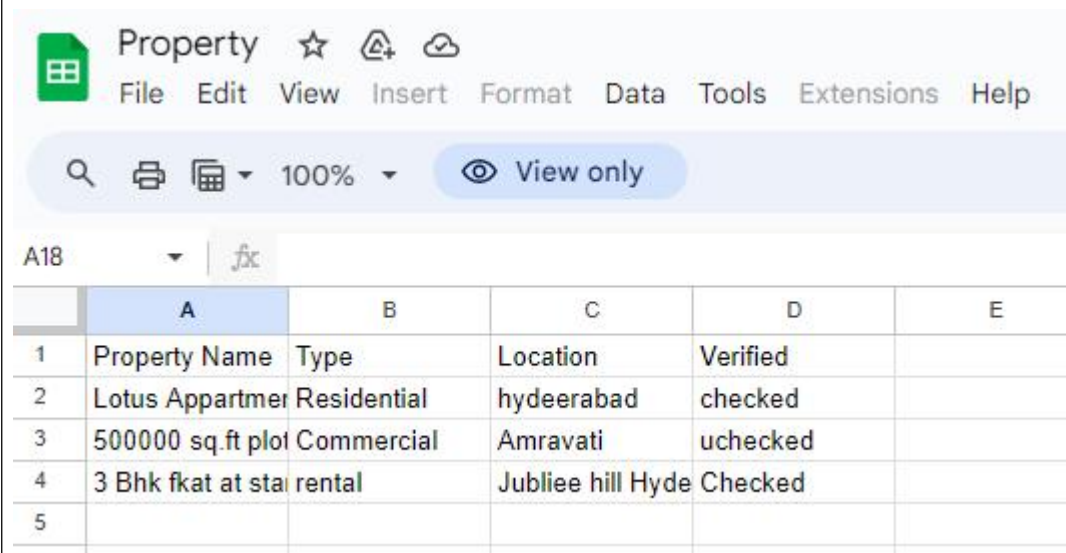
1.Customer object:



The screenshot shows a Google Sheet titled 'Customer' with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Customer	Phone Number	Email	State	Property Type	Budget Amount	Street Address	Street Address II	City	postal code	Verified		
2	Rakesh	788797	rakesh@gmail.c	Telangana	Residential	4000000	gb road	street no 45	Hyderabad	550001	checked		
3	prakash	55448855	p@gmail.com	Maharashtra	Commercial	8000000	gachibowli	indira road	mumbai	6600014	unchecked		
4	Prajwal	454545	prajwal@gmail.c	Maharashtra	Rental	25000	kandli	kathora	Amravati	444805	checked		
5													
6													

2.Property object:



The screenshot shows a Google Sheet titled 'Property' with the following data:

	A	B	C	D	E
1	Property Name	Type	Location	Verified	
2	Lotus Appartmer	Residential	hydeerabad	checked	
3	500000 sq.ft plot	Commercial	Amravati	uchecked	
4	3 Bhk fkat at sta	rental	Jubilee hill Hyde	Checked	
5					
-					

Task 3 : Create Roles

Roles help to define the hierarchy within an organization and control access to data based on a user's position within that hierarchy.

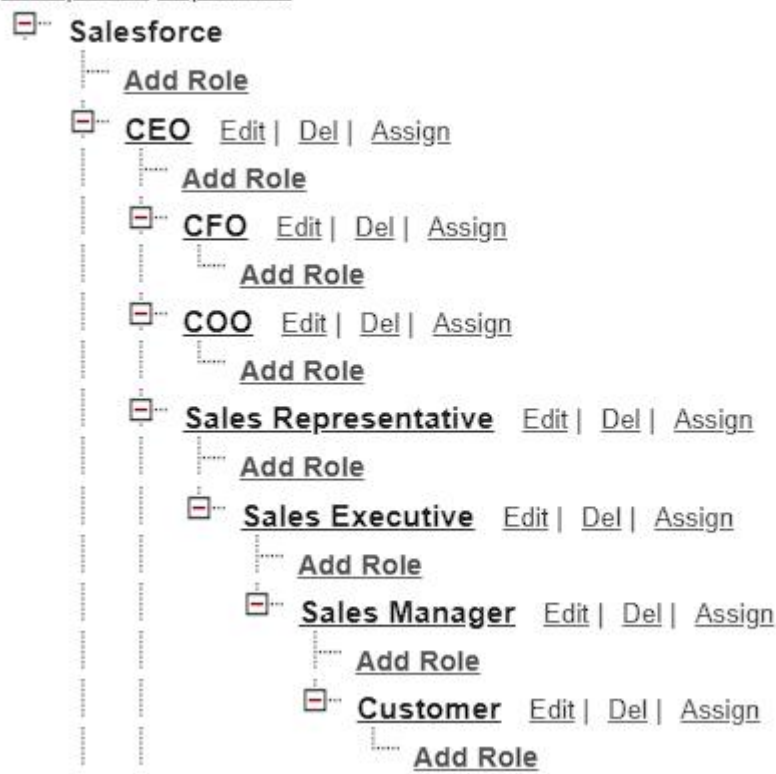
By creating and managing roles in Salesforce, you ensure that your CRM system is secure, efficient, and tailored to the needs of your organization. This not only protects sensitive information but also enhances the overall productivity and effectiveness of your team.

steps to create the roles:

1. Go to Salesforce Setup.
2. Navigate to "Roles" under "Users".
3. Create new roles such as Sales Executive, Sales Manager and Customer Support.
4. Sales Executive reports to the Sales representative , Sales Manager reports to the Sales Executive and Customer reports to Sales Manager.

Screenshots of Task 3:

[Collapse All](#) [Expand All](#)



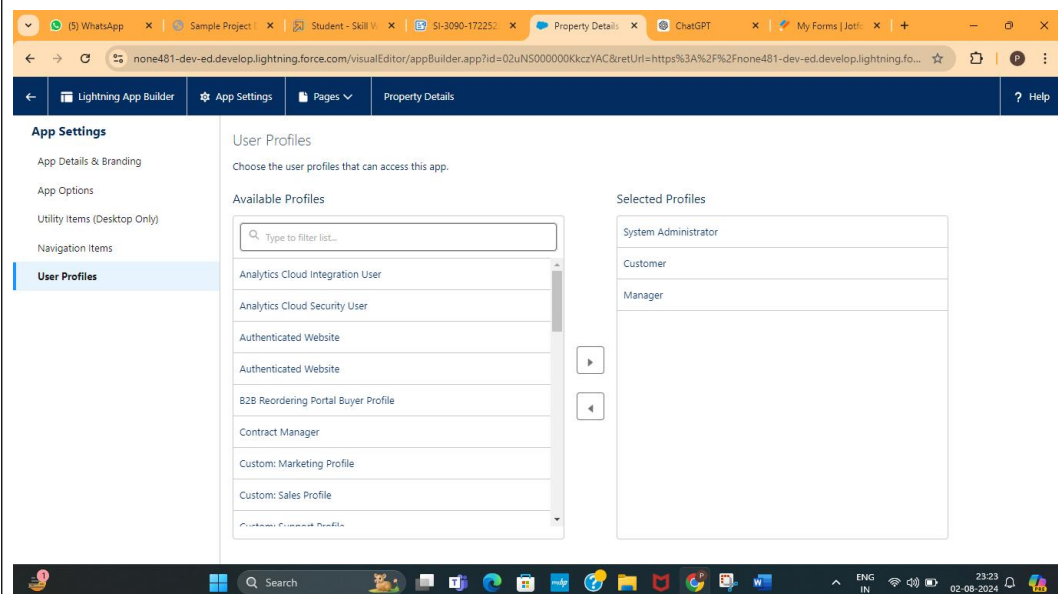
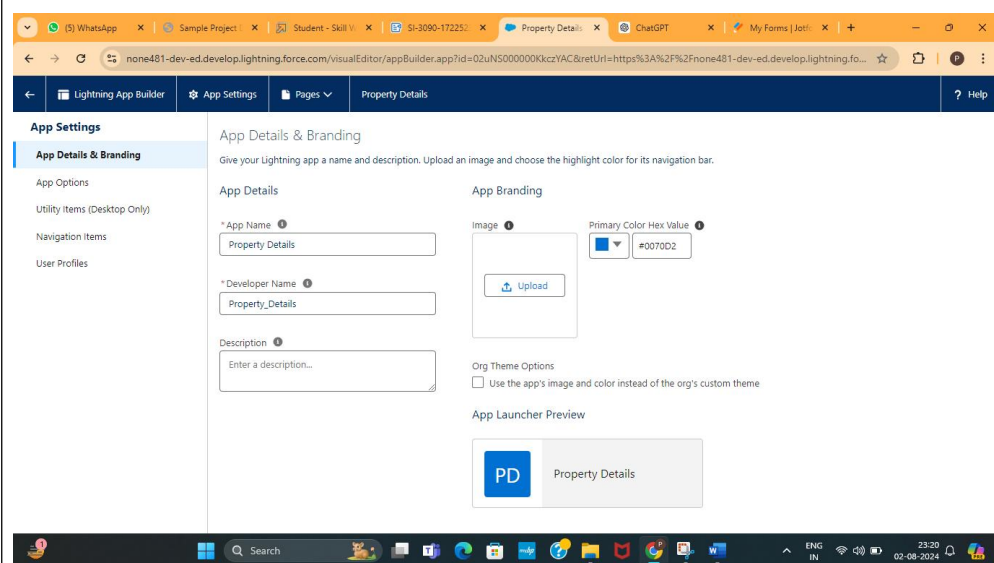
Task 4 : Create a Property Details App

- An App where the objects will be displayed

steps to create/build a property details app:

1. Navigate to the App manager.
2. Create a lightning app name it as Property Details , add Customer and Property object.
3. Add System admin Profile

Screenshots of Task 4:



Task 5 : Create Profiles

Creating profiles in Salesforce is essential for defining user permissions and controlling access to data and functionality within the Salesforce environment. Profiles help manage who can see, create, edit, or delete information based on their role within the organization

Steps to create profiles:

1. Go to Salesforce Setup.
2. Navigate to "Profiles".
3. Create custom profiles for different user types such as Customer and Manager.
4. Configure field-level security and permissions for each profile.

Screenshots of Task 5:

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Customer' profile is selected. The page displays a list of permissions and page layouts for this profile. Below the list, there is a 'Profile Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. The 'Profile Detail' table shows the following information:

Name	Customer
User License	Salesforce Platform
Description	
Created By	Peddolla Sathwika 27/07/2024, 7:37 pm
Modified By	Peddolla Sathwika 30/07/2024, 12:52 pm

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Manager' profile is selected. The page displays a list of permissions and page layouts for this profile. Below the list, there is a 'Profile Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. The 'Profile Detail' table shows the following information:

Name	Manager
User License	Salesforce Platform
Description	
Created By	Peddolla Sathwika 27/07/2024, 8:56 pm
Modified By	Peddolla Sathwika 30/07/2024, 12:52 pm

Task 6 : Create a Check Box field on user

Steps to create a checkbox field on user:

1. Goto Setup ,Click on Object Manager
2. Search for User navigate to Fields and Relationships
3. Create new Field Named as “Verified” as Data type “Check Box”

Screenshots of Task 6:

The screenshot displays the Salesforce Setup interface for creating a custom field. The breadcrumb trail at the top reads 'SETUP > OBJECT MANAGER' followed by 'User'. The left sidebar shows the 'Fields & Relationships' section expanded, with 'User Custom Field' selected. The main content area is titled 'Verified' and includes a 'Back to User Fields' link. Below the title, there are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section contains 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			
Compliance Categorization			
Created By	Peddola Sathwik	Modified By	Peddola Sathwik
	27/07/2024, 9:01 pm		27/07/2024, 9:01 pm

The 'General Options' section at the bottom shows the 'Default Value' as 'Unchecked'.

Task 7 : Create Users

Creating users in Salesforce is essential for ensuring that individuals within an organization can access and utilize the Salesforce platform to perform their specific job functions.

Steps to create users:

1. Go to Salesforce Setup.
2. Navigate to "Users" under "Administration".
3. Create new users and assign them to the appropriate profiles and roles.

User 1:

- Last Name >> Executive
- Role >> Sales Executive
- License >> Salesforce
- Profile >> System Administrator

User 2:

- Last Name >> Manager
- Role >> Sales Manager
- License >> Salesforce Platform
- Profile >> Manager

User 3:

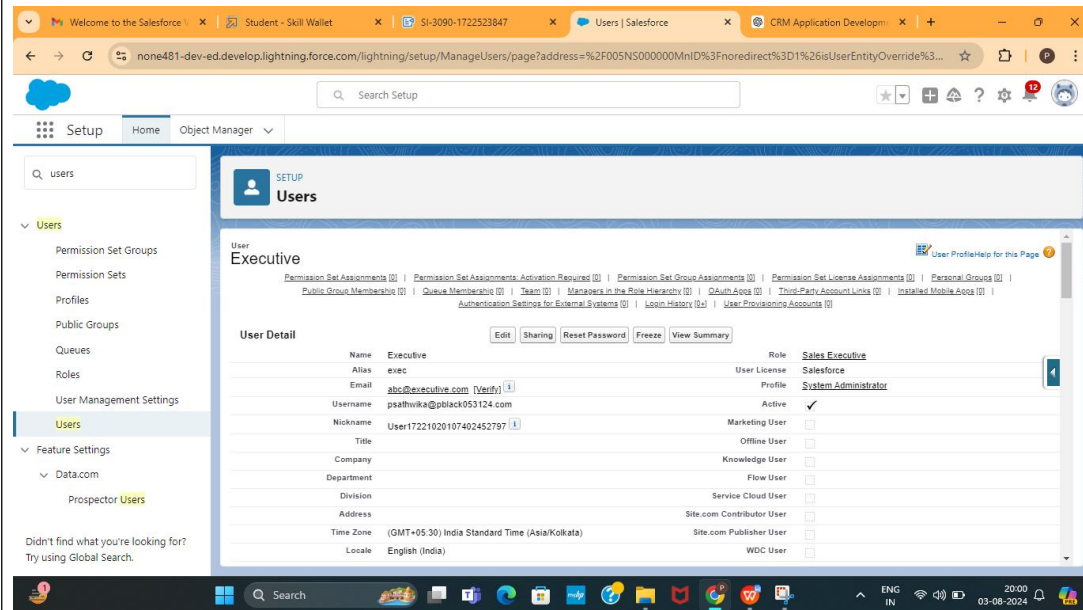
- Last Name >> Customer
- Role >> Customer
- License >> Salesforce Platform
- Profile >> Customer

User 4:

- Last Name >> Customer2
- Role >> Customer
- License >> Salesforce Platform
- Profile >> Customer

Screenshots of Task 7 :

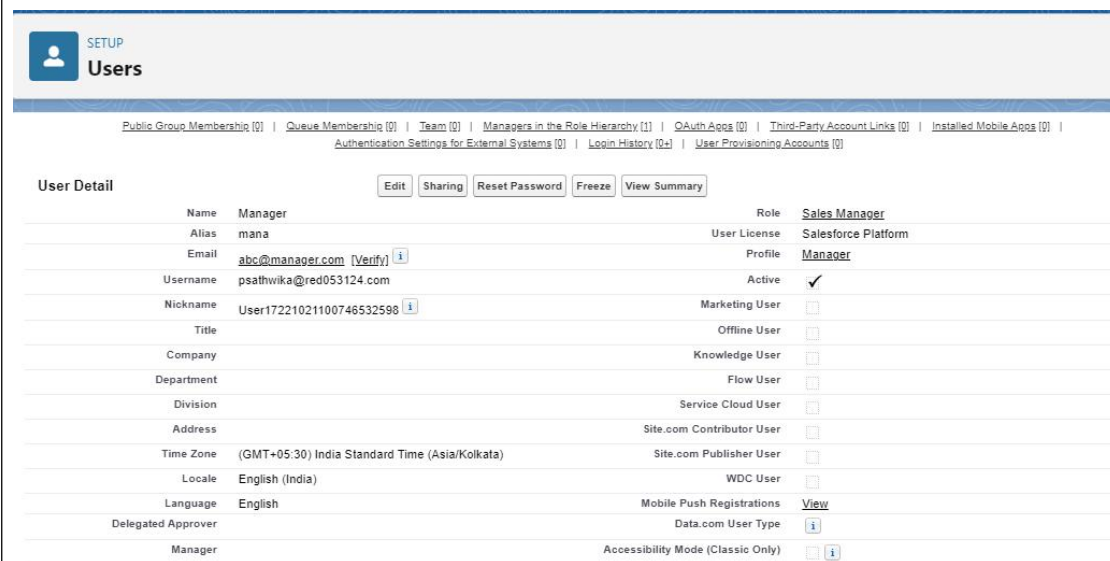
User 1:



The screenshot shows the Salesforce Setup page for a user named 'Executive'. The left sidebar contains navigation links for Users, Feature Settings, and Data.com. The main content area displays the 'User Detail' for 'Executive' with fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, and Locale. The 'Role' is 'Sales Executive', 'User License' is 'Salesforce', and 'Profile' is 'System Administrator'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked.

Field	Value
Name	Executive
Alias	exec
Email	abc@executive.com
Username	psathwika@pblack053124.com
Nickname	User17221020107402452797
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Role	Sales Executive
User License	Salesforce
Profile	System Administrator
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>


User 2:



The screenshot shows the Salesforce Setup page for a user named 'Manager'. The left sidebar contains navigation links for Users, Feature Settings, and Data.com. The main content area displays the 'User Detail' for 'Manager' with fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, and Locale. The 'Role' is 'Sales Manager', 'User License' is 'Salesforce Platform', and 'Profile' is 'Manager'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Language' is 'English'. The 'Mobile Push Registrations' are 'View'. The 'Data.com User Type' is 'i'. The 'Manager' checkbox is unchecked.

Field	Value
Name	Manager
Alias	mana
Email	abc@manager.com
Username	psathwika@red053124.com
Nickname	User17221021100746532598
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Mobile Push Registrations	View
Data.com User Type	i
Manager	<input type="checkbox"/>

User 3:

 **SETUP**
Users

User
Customer


[User Profile Help for this Page](#)

[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 Memberships \(0\)](#) | [Queue Memberships \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(2\)](#) | [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](#) [Freeze](#) [View Summary](#)

Name	Customer	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	abc@customer.com Verify i	Profile	Customer
Username	psathwika@green053124.com	Active	<input checked="" type="checkbox"/>
Nickname	User1722102285211773093 i	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 4:

 **SETUP**
Users

User
Customer2

[User Profile Help for this Page](#)

[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 Memberships \(0\)](#) | [Queue Memberships \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(2\)](#) | [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](#) [Freeze](#) [View Summary](#)

Name	Customer2	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	abc@customer2.com Verify i	Profile	Customer
Username	abc@.customer2.com	Active	<input checked="" type="checkbox"/>
Nickname	User17221025239618924271 i	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"/>

Task 8 : Create an Approval Process for Property Object

An Approval process to approve or reject the records as according.

Steps to create an approval process for property object:

1. Go to Salesforce Setup.
2. Navigate to "Approval Processes" under "Process Automation".
3. Create a new approval process for the Property object.
4. Define entry criteria, approval steps, and actions.

Entry criteria :

1. Location is not equal to blank
2. Verified Equals false.

approval steps:

1. Add an approval step name "Executive Approval "
2. specify the Criteria >> All record should enter
3. select the Approver as " Sales Executive "

Actions:

- Final Approval Actions :

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"

- Final Rejection Actions :

Add One field Update as "UnVerified Property"

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

Screenshots of Task 8:

 **Approval Processes**

Approval Processes

Property: Property Approval

[Back to Approval Process List](#)

Help for this Page

Process Definition Detail

Edit

Clone

Deactivate

Process Name

Property Approval

Active

✓

Unique Name

Property_Approval

Next Automated Approver Determined By

Manager of Record Submitter

Description

Entry Criteria

(Property: Location NOT EQUAL TO null) AND (Property: Verified EQUALS False)

Record Editability

Administrator OR Current Approver

Allow Submitters to Recall Approval Requests

☐

Approval Assignment Email Template

Initial Submitters

Role: Sales Manager, Property Owner

Created By

Peddolla Sathwika, 27/07/2024, 9:13 pm

Modified By

Peddolla Sathwika, 30/07/2024, 1:00 pm

Final Approval Actions

Add Existing

Add New

Action

Type

Description

Edit

Record Lock

Lock the record from being edited

Edit | Remove

Field Update

Verified Property

Final Rejection Actions

Add Existing

Add New

Action

Type

Description

Edit

Record Lock

Unlock the record for editing

Edit | Remove

Field Update

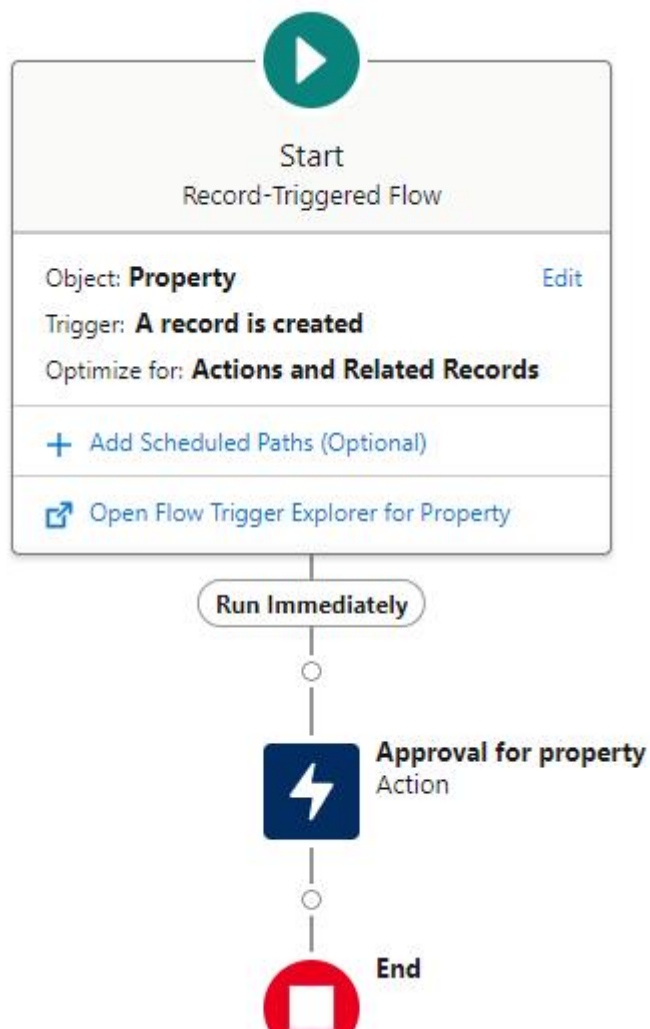
UnVerified Property

Task 9: Create a Record trigger flow to submit the Approval Process Automatically

Steps to create a record trigger flow:

1. Go to Salesforce Setup.
2. Navigate to "Flows" under "Process Automation".
3. Create a new record-triggered flow for the Property object.
4. Configure the flow to submit the approval process automatically when certain criteria are met.

Screenshots of Task 9:



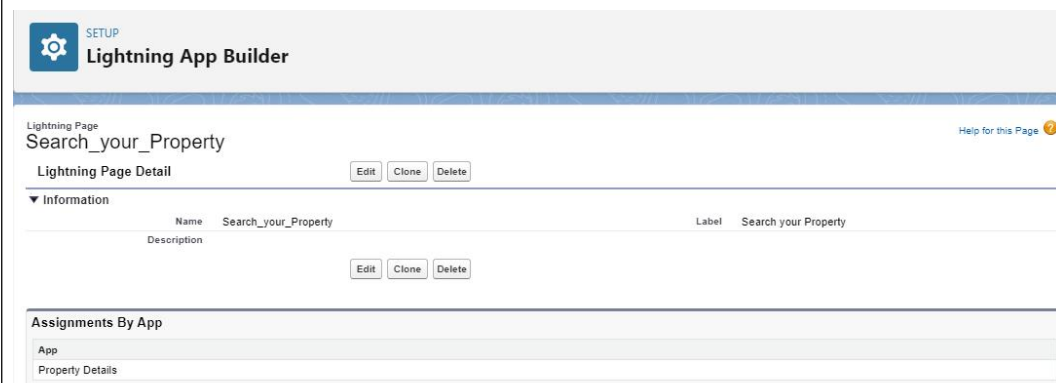
Task 10: Create an App Page

By creating app pages in Salesforce, organizations can deliver a more personalized, efficient, and effective user experience, leading to better business outcomes and higher user satisfaction.

steps to create an app page:

1. Use the Lightning App Builder to create a new app page.
2. Add relevant components and configure the layout.

Screenshots of Task 10:



Task 11: Create a LWC Component

We 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” .

Steps to create a LWC Component

1. Use Visual Studio Code and Salesforce CLI to create a new Lightning Web Component.
2. Implement the component logic and design.

Screenshots of Task 11 :

Apex Class Help for this F

PropertHandler_LWC

Apex Class Detail Edit Delete Download Security Show Dependencies

Name	PropertHandler_LWC	Status	Active
Namespace Prefix		Code Coverage	0% (0/2)
Created By	Sai Reddy , 30/07/2024, 11:41 am	Last Modified By	Sai Reddy , 30/07/2024, 11:41 am

Class Body Class Summary Version Settings Trace Flags

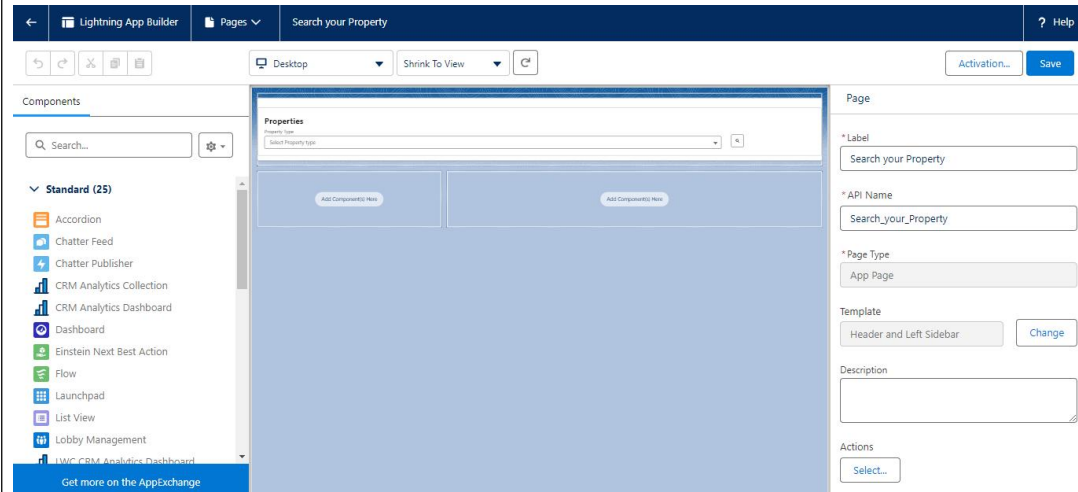
```
1 public class PropertHandler_LWC{
2
3     @AuraEnabled(cacheable=true)
4     public static list<Property__c> getProperty(string type , boolean verified){
5
6         return [SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c FROM Property__c Where Type__c =: type AND Verified__c =: verified];
7
8     }
9
10 }
11
12 }
```

Task 12: Drag this Component to your App Page

Steps to add LWC component to App page:

1. Go to the Lightning App Builder.
2. Drag and drop the created LWC component onto the app page.

Screenshots of Task 12 :

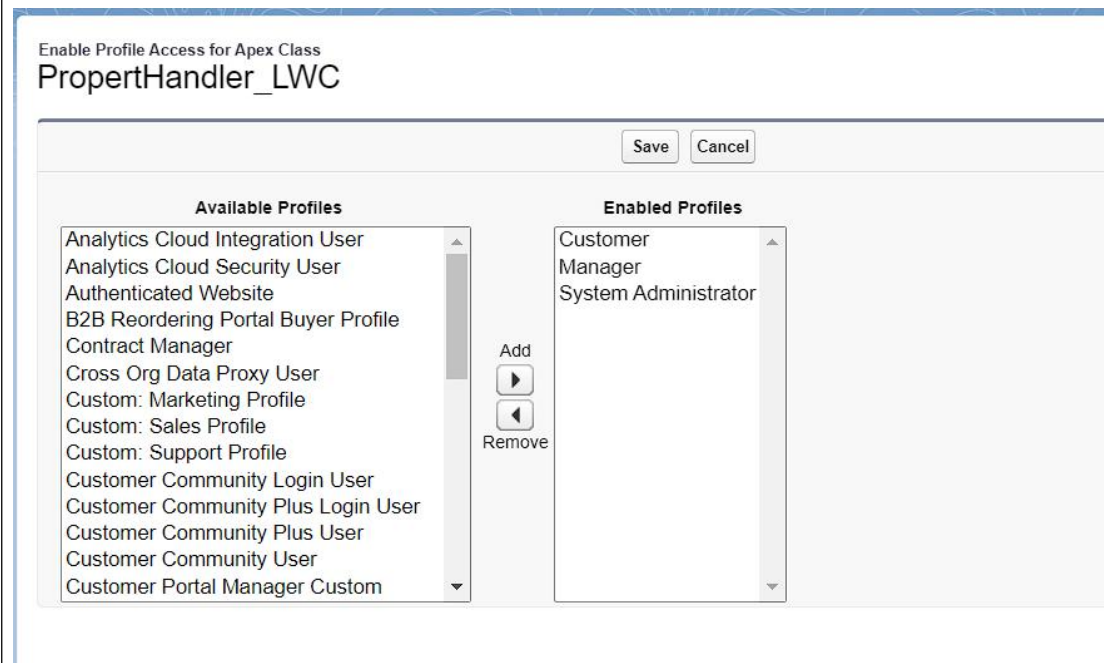


Task 13: Give Access of Apex Classes to Profiles

Steps to Assign Apex Class Access to Profiles:

1. Go to Salesforce Setup.
2. Navigate to "Profiles".
3. Edit the profiles to include access to the necessary Apex classes.

Screenshots of Task 13 :



Thank You