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.

INDEX Page

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.

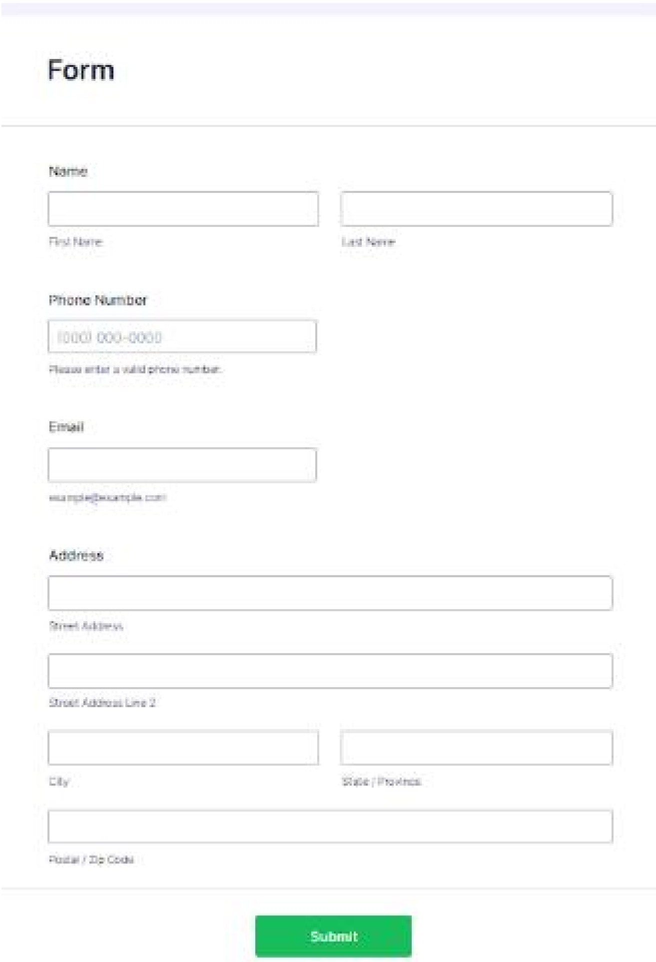
In the real estate industry, managing a large number of client interactions and property details can be a daunting task. Real estate professionals often juggle multiple responsibilities, from tracking prospective buyers and sellers to managing extensive property listings and coordinating transactions.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

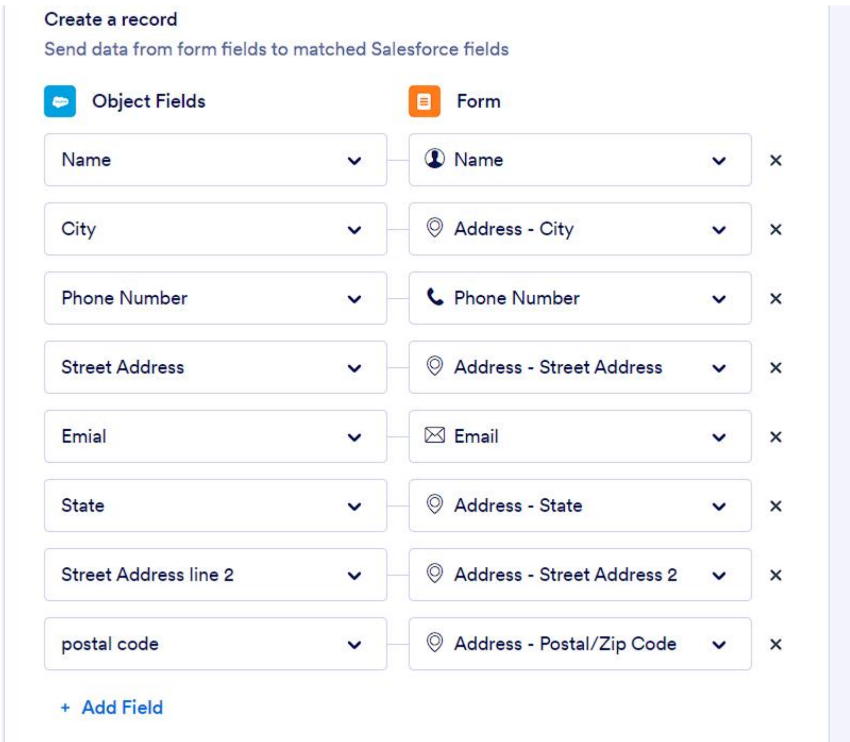
To address these challenges, our CRM application leverages Salesforce's powerful customization capabilities to create a tailored solution for real estate professionals. The application will provide a centralized platform for managing client information, property listings, and interactions, enabling users 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,Addrress,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:





<u>Task 2</u> **: Create Objects from Spreadsheet**

1. create spreadsheet(if not provided)

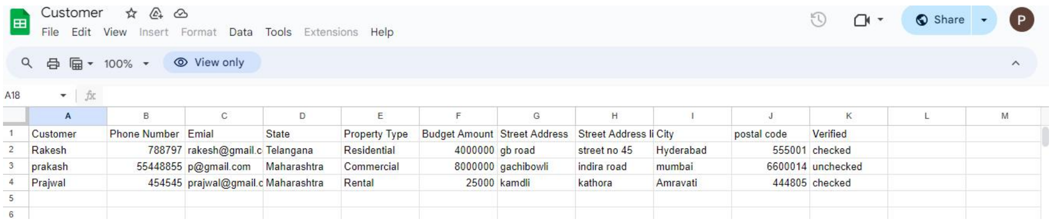
- Create spreadsheet with the necessary columns for customer and property details.
- Save the spreadsheet in CSV format.

2.Use spreadsheet to create objects (if provided)

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

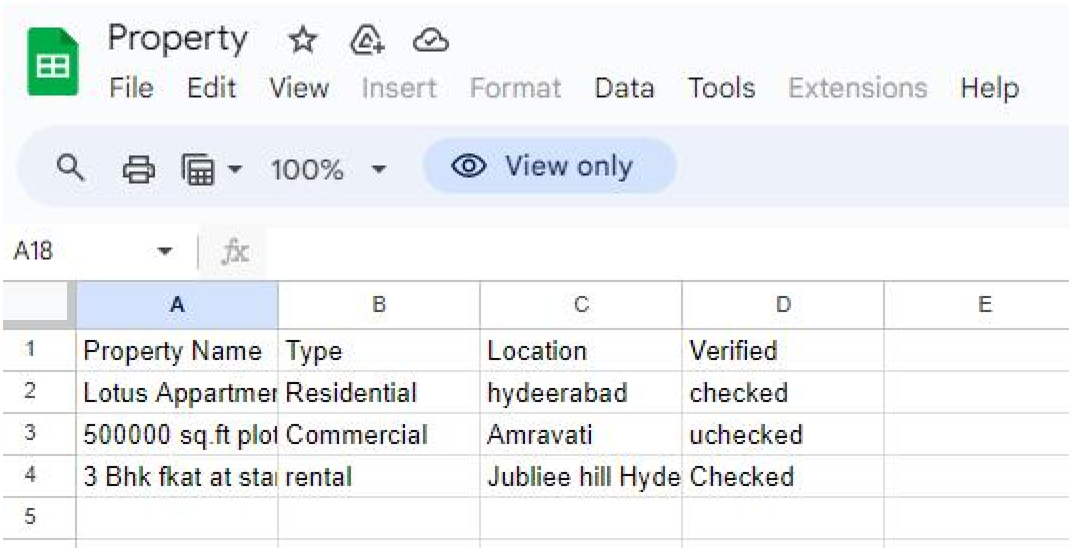
Screenshots of Task2:

1.Customer object:



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Customer	Phone Number	Emial	State	Property Type	Budget Amount	Street Address	Street Address li	City	postal code	Verified		
2	Rakesh	788797	rakesh@gmail.c	Telangana	Residential	4000000	gb road	street no 45	Hyderabad	555001	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	kamdli	kathora	Amravati	444805	checked		
5													
6													

2.Property object:



	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	Jubliee 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 representive , Sales Manager reports to the Sales Executive and Customer reports to Sales Manager.

Screenshots of Task 3:

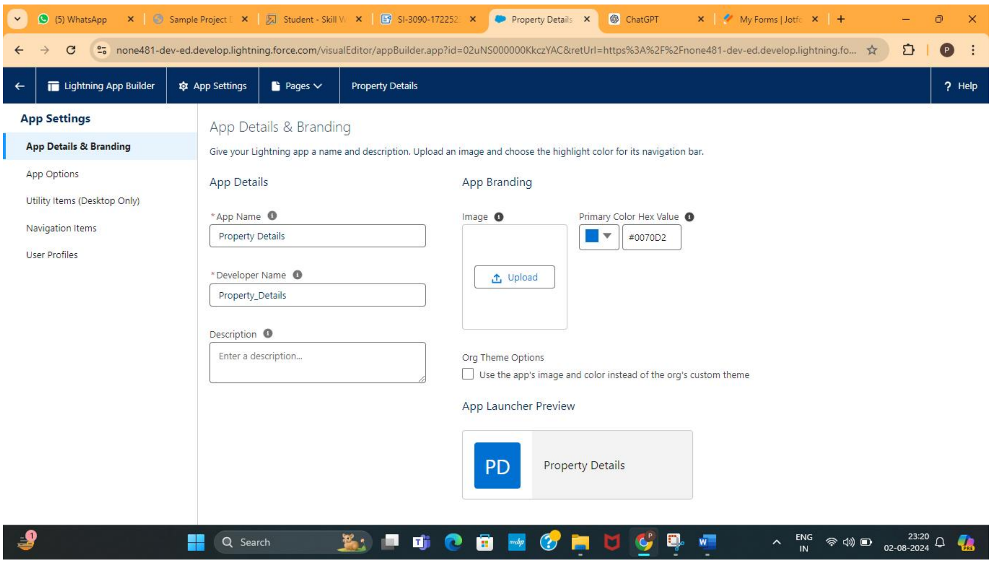
<u>Task 4</u> : Create a Property Details App

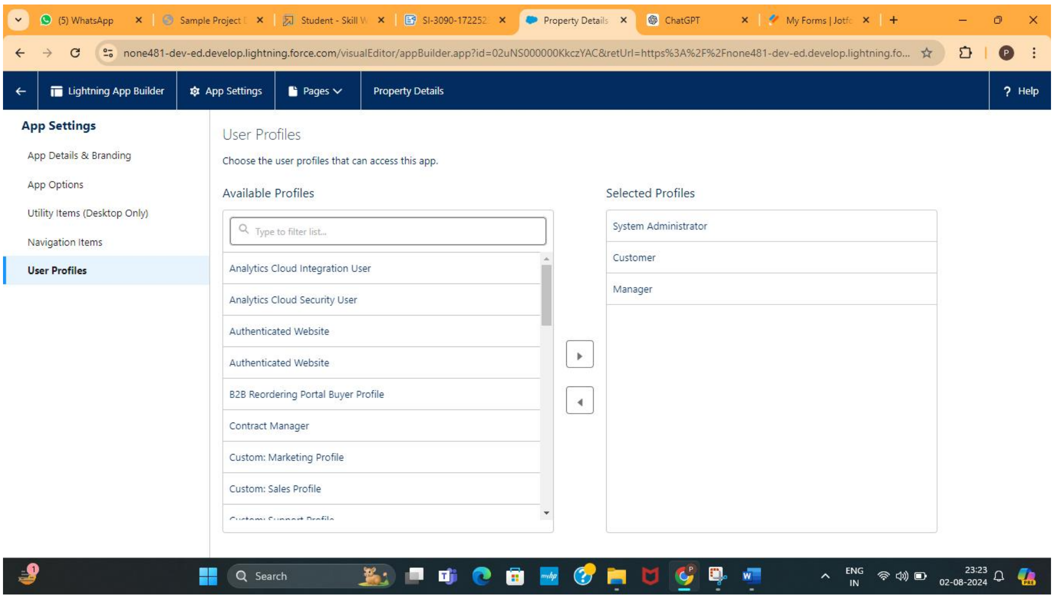
- An App where the objects will be displayed

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:





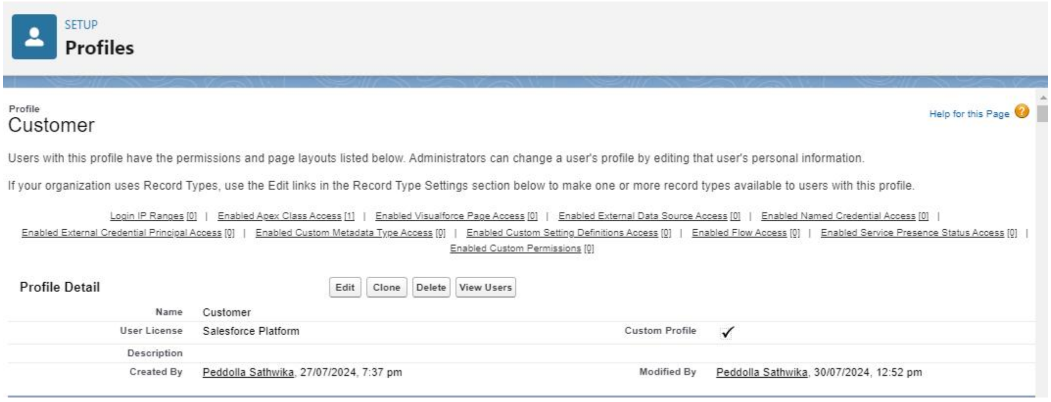
<u>Task 5</u> : Create Profiles

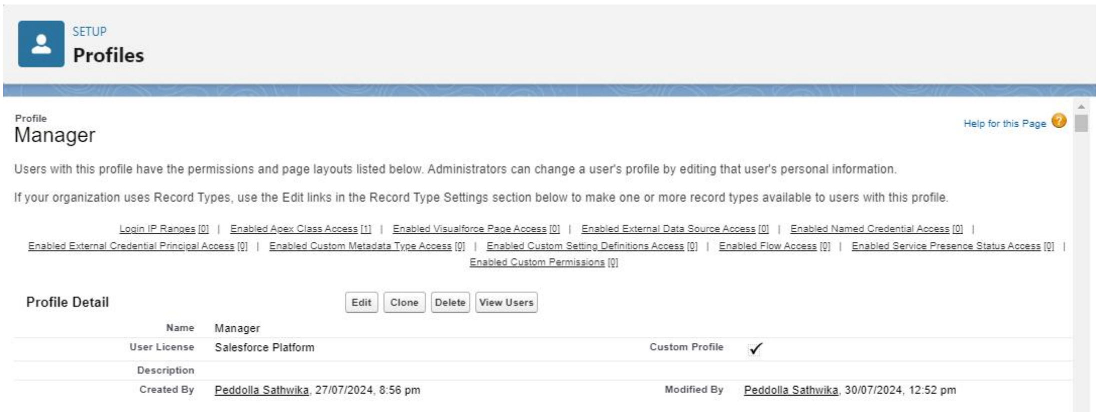
Creating profiles in Salesforce is essential for defining user permissions and controlling access to data and functionality within the Salesforce environment. Profiles help manage who can see, create, edit, or delete information based on their role within the organization

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:



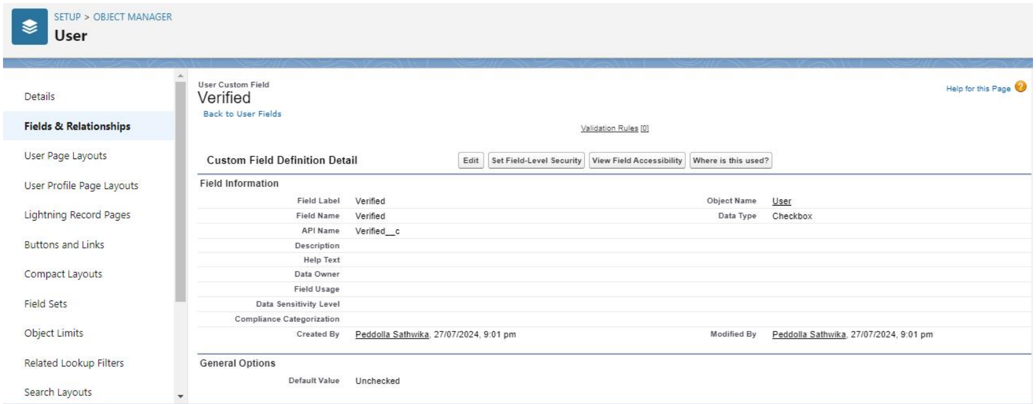


<u>Task 6</u> : Create a Check Box field on user

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:



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:

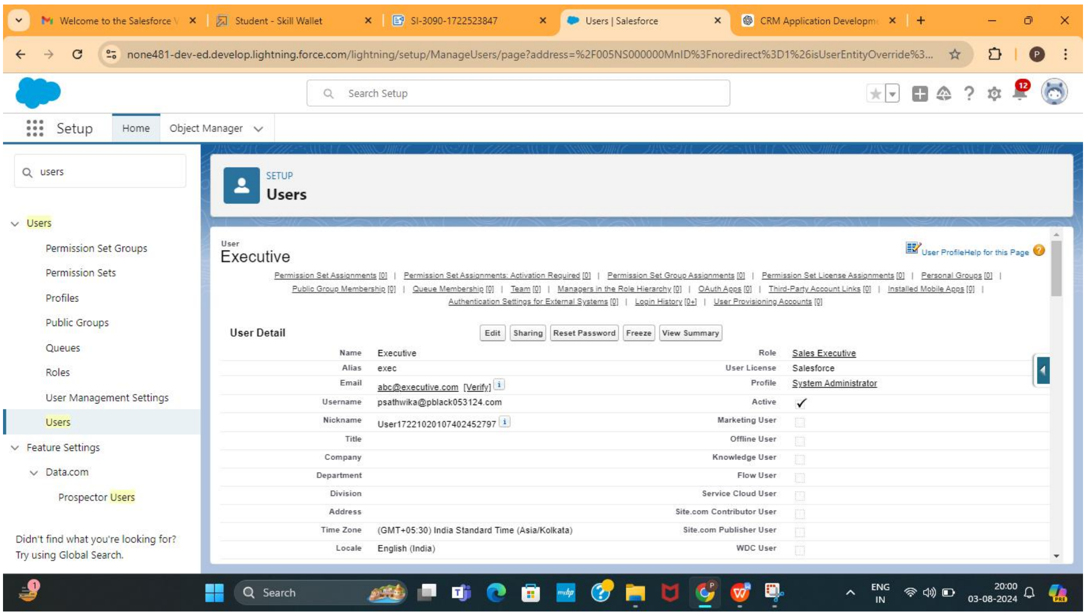
- Last Name >> Customer
- Role >> Customer
- License >> Salesforce Platform
- Profile >> Customer

User 4:

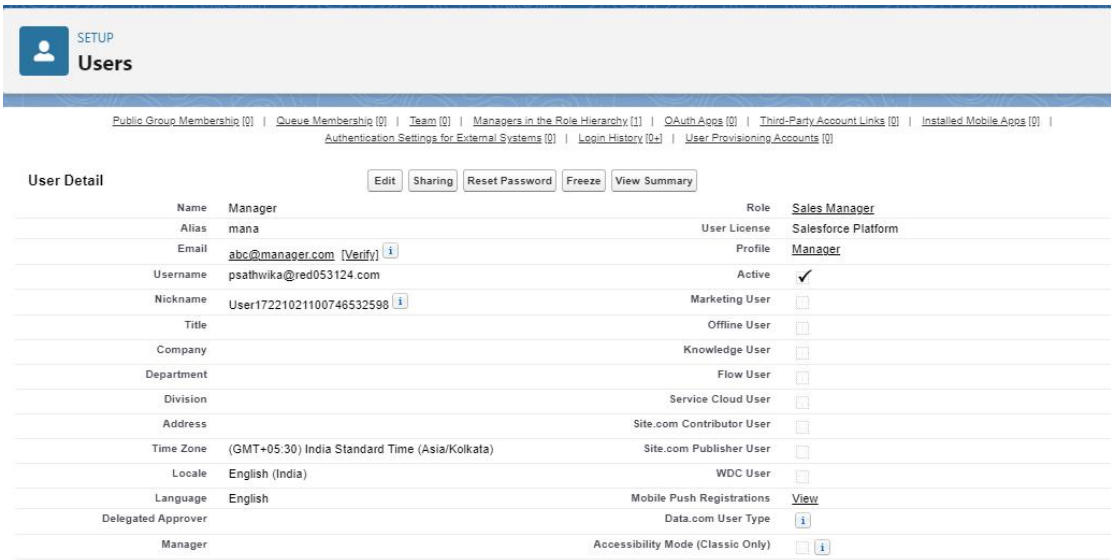
- Last Name >> Customer2
- Role >> Customer
- License >> Salesforce Platform
- Profile >> Customer

Screenshots of Task 7 :

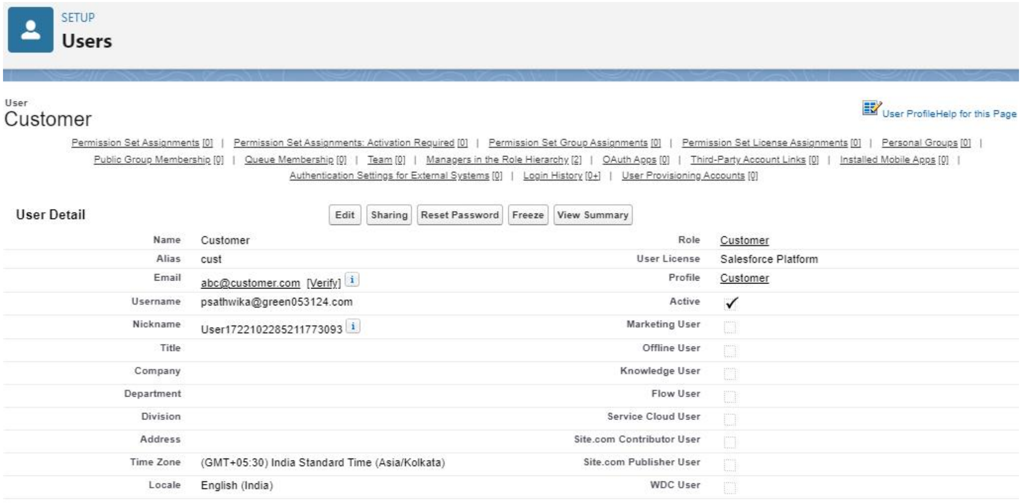
User 1:



User 2:



User 3:



SETUP

Users

User

Customer

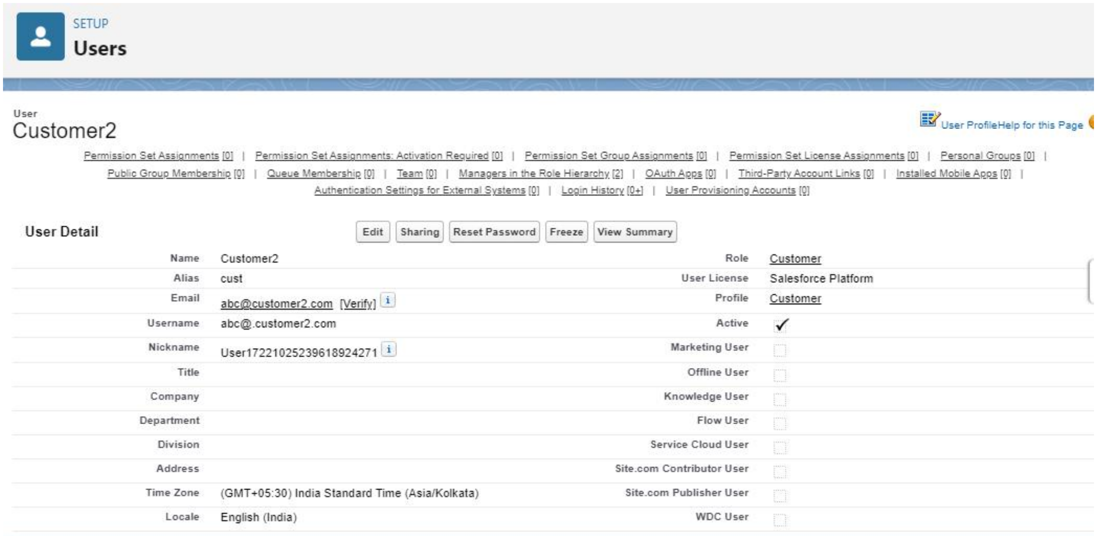
User ProfileHelp for this Page

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 Membership [0] | Queue Membership [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]	Profile	Customer
Username	psathwika@green053124.com	Active	
Nickname	User1722102285211773093	Marketing User	
Title		Offline User	
Company		Knowledge User	
Department		Flow User	
Division		Service Cloud User	
Address		Site.com Contributor User	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	
Locale	English (India)	WDC User	

User 4:



SETUP

Users

User

Customer2

User ProfileHelp 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 Membership [0] | Queue Membership [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]	Profile	Customer
Username	abc@.customer2.com	Active	
Nickname	User17221025239618924271	Marketing User	
Title		Offline User	
Company		Knowledge User	
Department		Flow User	
Division		Service Cloud User	
Address		Site.com Contributor User	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	
Locale	English (India)	WDC User	

<u>Task 8</u> : 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"

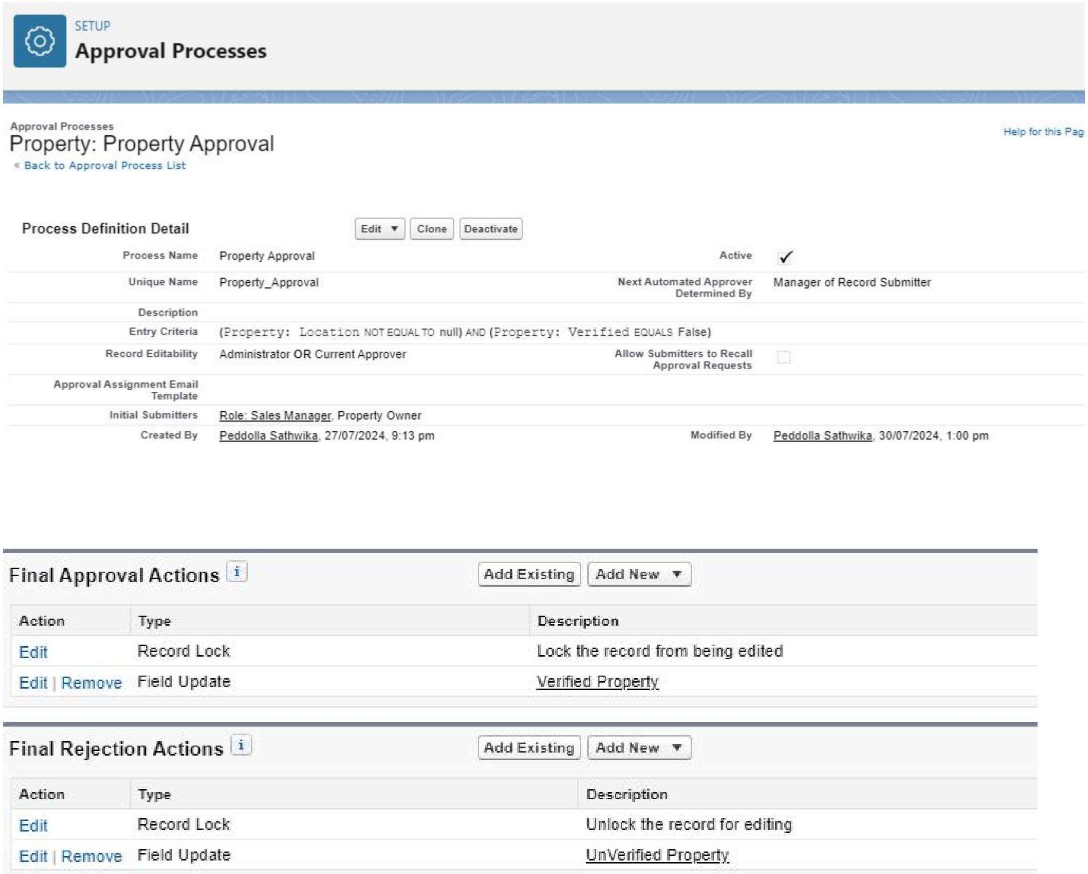
1. Select Object >> Property
2. Field to Update >> Verified
3. Field Data Type >> CheckBox
4. Select CheckBox Option as "True"

- 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:



SETUP

Approval Processes

Approval Processes

Property: Property Approval

« Back to Approval Process List

Help for this Pag

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 ▼

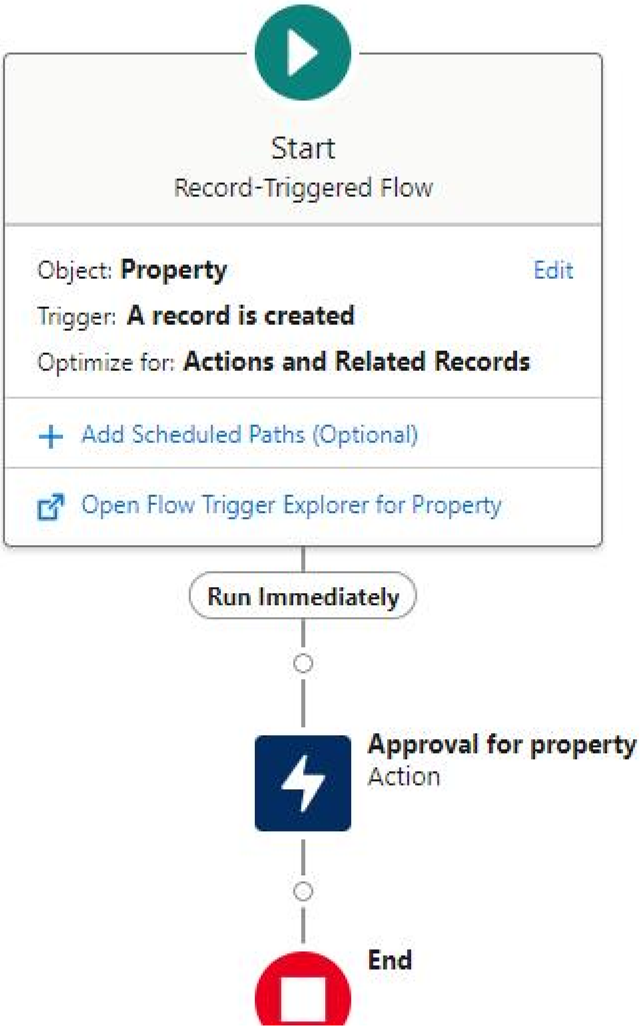
Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit | Remove	Field Update	UnVerified Property

<u>Task 9</u>: 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:



<u>Task 10</u>: 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:

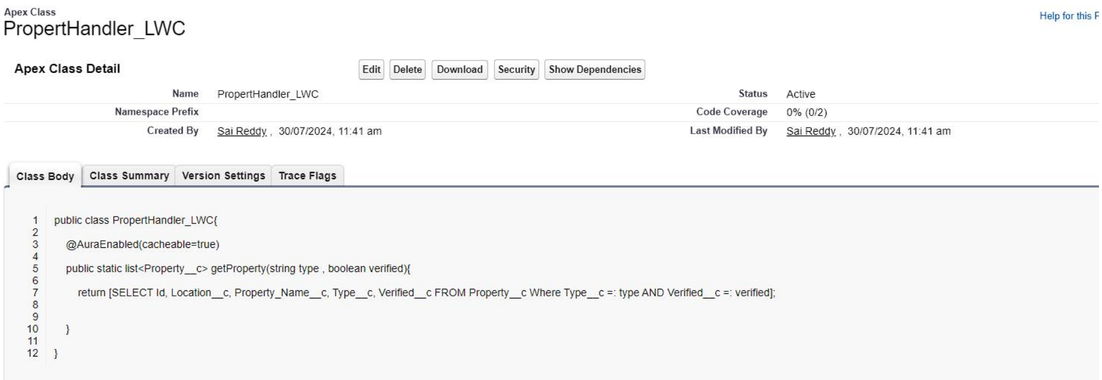
<u>Task 11:</u> Create a LWC Component

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 :

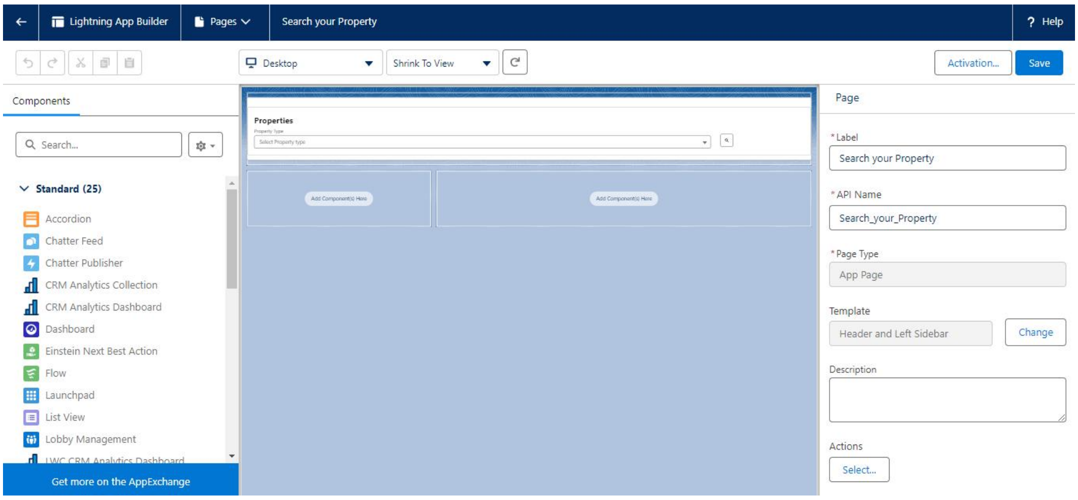


<u>Task 12</u>: Drag this Component to your App Page

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 :

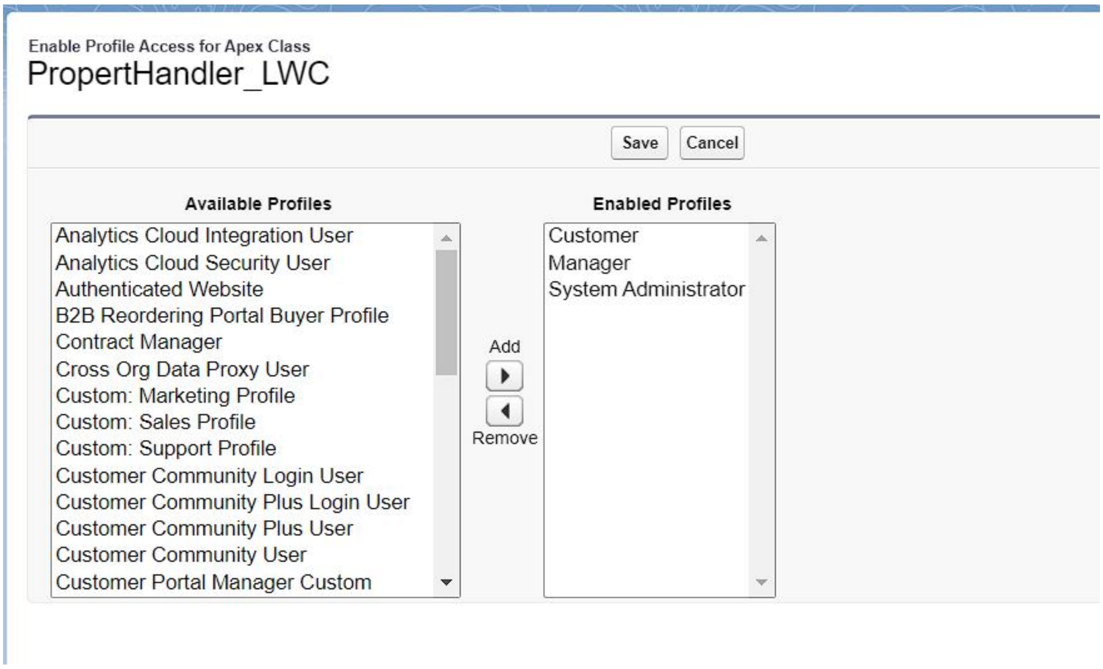


Task 13: Give Access of Apex Classes to Profiles

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