

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

- Add, update, and delete client details.
- Track client preferences, budget, and location interests.
- Maintain contact details and communication history.

2. Property Management

- Manage property listings with details like type, price, location, and features.
- Track properties available for sale, rent, or lease.
- Upload photos and documents for properties.

3. Requirement Matching

- Match client requirements with available properties using filters.
- Notify clients about new properties that fit their criteria.

4. Lead Tracking

- Manage inquiries and follow up with potential clients.
- Schedule meetings and site visits.
- Assign leads to specific team members.

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.

Activity: 1

1. Open your browser and search for jotform and log in.
2. After login click on create form and click on start from scratch
3. Now create a form to get the customer details like Name, Phone, Email, Address and type of property the customer is interested in.
4. Once the form is created, publish it by clicking on publish,
5. form link: <https://form.jotform.com/243219167906057>

The screenshot shows the Jotform 'Dreams World' form builder interface. The left sidebar contains 'Form Elements' categorized into Basic, Text, Form Elements, and Tables. The main workspace displays a form titled 'Dreams World' with the following fields: Name (First Name, Last Name), Phone Number, Email, another Phone Number, a dropdown for 'Which type of Property are you looking for?' (Residential, Commercial, Rental), Budget Amount, Address (Street Address, Street Address Line 2, City, State/Province, Postal / Zip Code), and a Submit button. The Jotform logo and 'Form Builder' text are visible at the top left.

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](#)

Customer	Phone Number	Email	State	Property Type	Budget Amount	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

4. 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 includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' section is expanded, showing a list of objects. The 'Customer' object is selected, and its configuration page is displayed. The page has a left sidebar with various configuration options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area shows the 'Details' for the 'Customer' object, including fields like 'API Name', 'Singular Label', 'Plural Label', and 'Object Limits'. The 'API Name' is 'Customer__c', 'Singular Label' is 'Customer', and 'Plural Label' is 'Customer'. The 'Object Limits' section shows 'Enable Reports' and 'Track Activities' both checked. The 'Deployment Status' is 'Deployed', and the 'Help Settings' are set to 'Standard salesforce.com Help Window'. There are 'Edit' and 'Delete' buttons in the top right corner of the details section.

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 Appartme	Residential	hydeerabad	checked
500000 sq.ft pl	Commercial	Amravati	unchecked
3 Bhk fkat at st	rental	Jubilee hill Hyd	Checked

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

The screenshot shows the Salesforce Setup interface for the 'Property' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, 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 'Details' section is currently selected. The main content area displays the configuration for the 'Property' object, including the following fields:

- Description: (empty text field)
- API Name: Property__c
- Custom: (checked)
- Singular Label: Property
- Plural Label: Property
- Enable Reports: (checked)
- Track Activities: (checked)
- Track Field History: (checked)
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

At the top right of the main content area, there are 'Edit' and 'Delete' buttons. The top navigation bar includes the 'Setup' link, a search bar, and various utility icons.

Integrate Jotform with Salesforce Platform

In this Milestone we are going to integrate jotform with Salesforce

Activity :-1

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".

The screenshot shows the Jotform integration setup interface for Salesforce. On the left, a sidebar contains various settings categories. The main panel is titled 'SALESFORCE' and shows the 'Create a record' action selected. A table maps Jotform fields to Salesforce fields:

Object Fields	Dreamhome
Customer__c	Name - First Name
City	Address - City
Budget Amount	Budget Amount
Property Type	Which type of property are you lookin...
Phone Number	Phone Number
Street Address	Address - Street Address
Email	Email
Customer Name	Name - Last Name
State	Address - State
Street Address line 2	Address - Street Address 2

Then "Save the Integration" and "Finish".

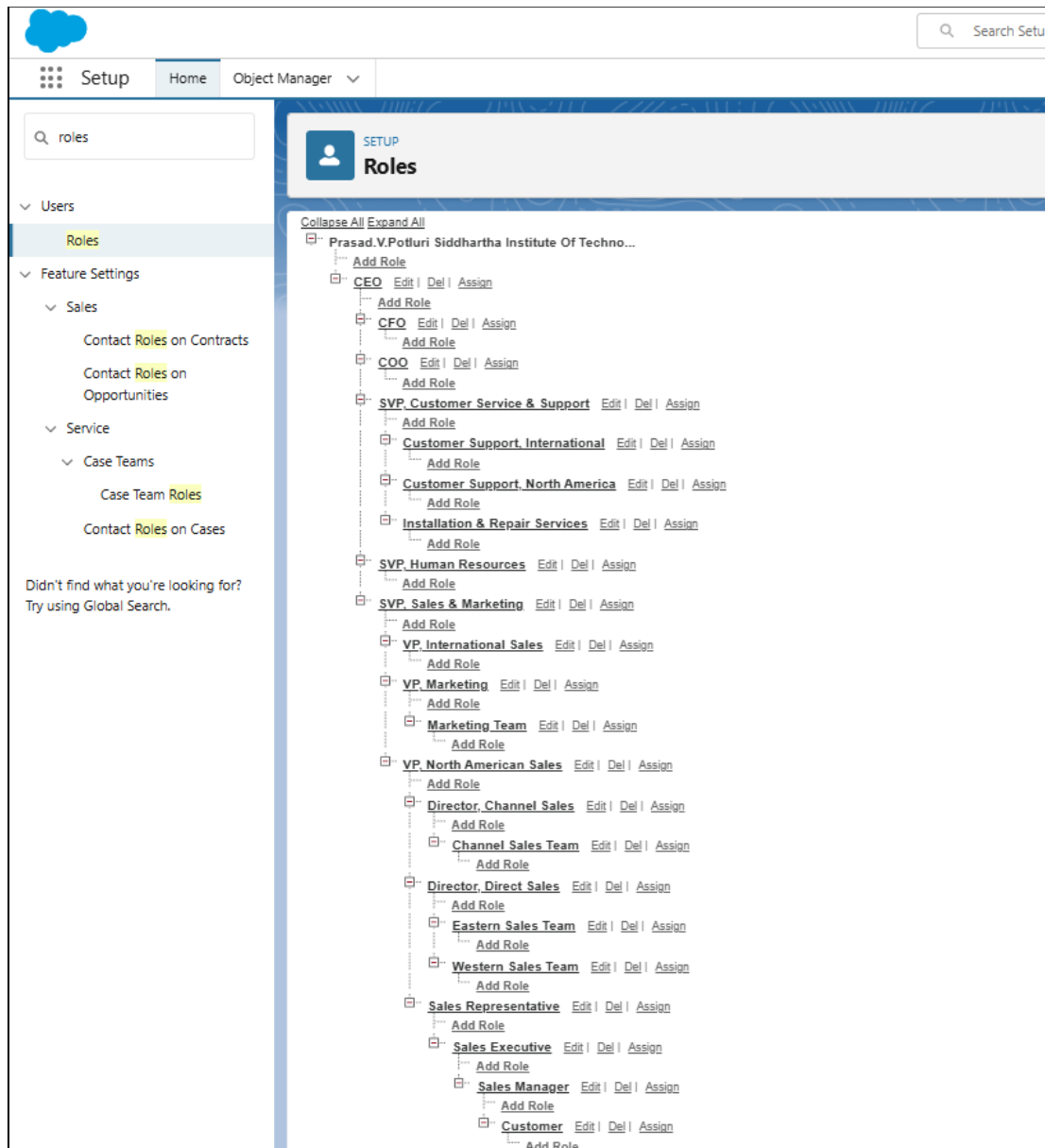
The screenshot shows the 'All Actions' screen for the Salesforce integration. It displays a list of actions, with the first action selected: '1 Create or update a record Customer'. There are buttons for 'See Action Logs' and '+ Add New Action'.

Create Roles

Here we need to Create Roles as per business requirement

Activity :- 1

Go to Setup and Click on Roles, then click on Expand all and Add a Role just below the Sales Representative





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.

Role Edit
Sales Executive

Role Edit

Label	<input type="text" value="Sales Executive"/>
Role Name	<input type="text" value="Sales_Executive"/> 
This role reports to	<input type="text" value="Sales Representative"/> 
Role Name as displayed on reports	<input type="text"/>

- 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.

App Details

* App Name ⓘ

Property Details

* Developer Name ⓘ

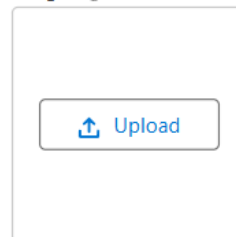
Property_Details

Description ⓘ

Enter a description...

App Branding

Image ⓘ



Primary Color Hex Value ⓘ

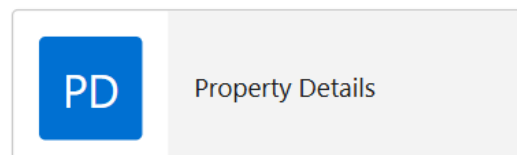


#0070D2

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 Profile :-

1. From Setup? Go to Profiles and Clone (standard platform) 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"
5. Make sure every submission object permissions are unselected and then save.

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

Object Name	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Active Search Slugs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Data Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Tests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Phones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Type Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D&B Companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Legal Bases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Purposes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mass	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nonresidence Registrations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scratch Org Infos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

Object Name	Read	Create	Edit	Delete	View All	Modify All
Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Property	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After:

Session Security Level Required at Login:

Creating Manager Profile :-

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".

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Active Scratch Orgs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Data Uses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authorization Form Texts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Phones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Type Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D&B Companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Legal Bases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Purposes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Namespace Registries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scratch Org Info	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Property	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Create a Check Box 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 Setup interface for defining a custom field. The breadcrumb trail at the top reads 'SETUP > OBJECT MANAGER'. The left sidebar contains a navigation menu with 'Fields & Relationships' selected. The main content area is titled 'User Custom Field' and 'Verified'. Below the title, there are tabs for 'Field Information', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' tab is active, showing a table with 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	Eda Sathya	Modified By	Eda Sathya
	18/11/2024, 1:00 pm		18/11/2024, 1:00 pm

Below the table, the 'General Options' section shows the 'Default Value' as 'Unchecked'. The 'Validation Rules' section at the bottom indicates 'No validation rules defined.' and includes a 'New' button to create a rule. At the bottom of the page, there are status bars for 'Always show me more records per related list' and 'No new notifications (Do not disturb on)'.

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

The screenshot shows the 'User Edit' page in Salesforce. The page title is 'User Edit Executive'. Below the title, there are buttons for 'Save', 'Save & New', and 'Cancel'. The page is divided into two main sections: 'General Information' and 'User License'. The 'General Information' section contains fields for First Name, Last Name (Executive), Alias (exec), Email (user1@pvpsit.ac.in), Username (user12@pvpsit.com), Nickname (User173191539385911810), Title, Company, Department, and Division. The 'User License' section contains fields for Role (Sales Executive), User License (Salesforce), Profile (System Administrator), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None--), Data.com Monthly Addition Limit (300), and Accessibility Mode (Classic Only). A red exclamation mark icon indicates required information.

User: 2

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

SETUP Users

User Edit
Manager

Help for this Page

User Edit Save Save & New Cancel

General Information Required Information

First Name		Role	Sales Manager
Last Name	Manager	User License	Salesforce Platform
Alias	mana	Profile	Manager
Email	user2@pvpsit.ac.in	Active	<input checked="" type="checkbox"/>
Username	user23@pvpsit.com	Marketing User	<input type="checkbox"/>
Nickname	User173191565818378493	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>

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 verified check box is "Unchecked"
7. Save

SETUP Users

User Edit
Customer

Help for this Page

User Edit Save Save & New Cancel

General Information Required Information

First Name		Role	Customer
Last Name	Customer	User License	Salesforce Platform
Alias	cust	Profile	Customer
Email	user3@pvpsit.ac.in	Active	<input checked="" type="checkbox"/>
Username	user34@pvpsit.com	Marketing User	<input type="checkbox"/>
Nickname	User173191584093220151	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>

User: 4

1. Go to 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

The screenshot shows the 'User Edit' page for a user named 'Customer2' in the Salesforce 'Users' section. The page has a header with 'SETUP Users' and a 'Help for this Page' link. Below the header, there are buttons for 'Save', 'Save & New', and 'Cancel'. The main content area is titled 'User Edit Customer2' and contains a 'General Information' section. This section is divided into two columns of fields. The left column includes 'First Name', 'Last Name' (filled with 'Customer2'), 'Alias' (filled with 'cust2'), 'Email' (filled with 'user4@pvpsit.ac.in'), 'Username' (filled with 'user45@pvpsit.com'), 'Nickname' (filled with 'User173191603085873917'), 'Title', 'Company', 'Department', and 'Division'. The right column includes 'Role' (filled with 'Customer'), 'User License' (filled with 'Salesforce Platform'), 'Profile' (filled with 'Customer'), 'Active' (checked), 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Data.com User Type' (filled with '--None--'), 'Data.com Monthly Addition Limit' (filled with '300'), and 'Accessibility Mode (Classic Only)'. A red asterisk icon indicates required information.

SETUP
Users

User Edit
Customer2

Help for this Page

User Edit

Save Save & New Cancel

General Information

First Name

Last Name Customer2

Alias cust2

Email user4@pvpsit.ac.in

Username user45@pvpsit.com

Nickname User173191603085873917

Title

Company

Department

Division

Role Customer

User License Salesforce Platform

Profile Customer

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type --None--

Data.com Monthly Addition Limit 300

Accessibility Mode (Classic Only) ☐

* Required Information

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 -
 - a. Location - not equal to - blank,
 - b. Verified-Equals- false
5. Click next and "Next Automated Approver Determined By" Select Manager
6. From Record Editability Properties >> Click on Administrators OR the currently assigned approver can edit records during the approval process.
7. From Step 5: Select Fields to Display on Approval Page Layout select Property, Owner, Location, Type.

Approval Process Edit
Property Approval

Step 5. Select Fields to Display on Approval Page Layout

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields		Selected Fields
Created By	Add Remove	Property
Last Modified By		Owner
Verified		Location
		Property Name
		Type

Up
Down

[Click here to view an example](#)

Click Next and Select the initial Submitters >>

- Owner >> Property Owner
- Roles >> Sales Manager

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"

- Select Object >> Property
- Field to Update >> Verified
- Field Data Type >> CheckBox
- Select CheckBox Option as "True"
- Save.

Add One field Update as "UnVerified Property"

- Select Object >> Property
- Field to Update >> Verified
- Field Data Type >> CheckBox
- Select CheckBox Option as "False"
- Save.

Activate the Approval Process.

Approval Processes

Property: Property Approval

[Help for this Page](#)

[« Back to Approval Process List](#)

Process Definition Detail

EditCloneDeactivate

Process Name	Property Approval	Active	<input checked="" type="checkbox"/>
Unique Name	Property_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	(Property: Location NOT EQUAL TO Blank) AND (Property: Verified EQUALS False)		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Role: Sales Manager, Property Owner		
Created By	Eda Srakhya, 18/11/2024, 1:30 pm	Modified By	Eda Srakhya, 18/11/2024, 1:43 pm

Initial Submission Actions

Add ExistingAdd New

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps

Show ActionsEdit

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
	1	Executive Approval			User:Executive	Final Rejection

Create a Record trigger flow to submit the Approval Process Automatically


A flow that can submit the records directly for approval

Activity :- 1

1. From Setup >> Search for Flows >> Click On New and Select "Record Trigger Flow".
2. Select Object >> 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

Save the Flow and Give label as "Property Approval" and "Activate"

Last saved on 17/11/2024, 11:49 am **Active** [Run](#) [Debug](#) [View Tests](#) [Save As New Version](#) [Save](#) [Deactivate](#)



Record Trigger Start

Submit for Approval

* Label
Approval for property

* API Name ⓘ
Approval_for_property

Description

Submit for Approval ⓘ
submit-submit

Use values from earlier in the flow to set the inputs for the "Submit for Approval" core action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

A_a * Record ID ⓘ
A_a Triggering Property_c > Record ID X

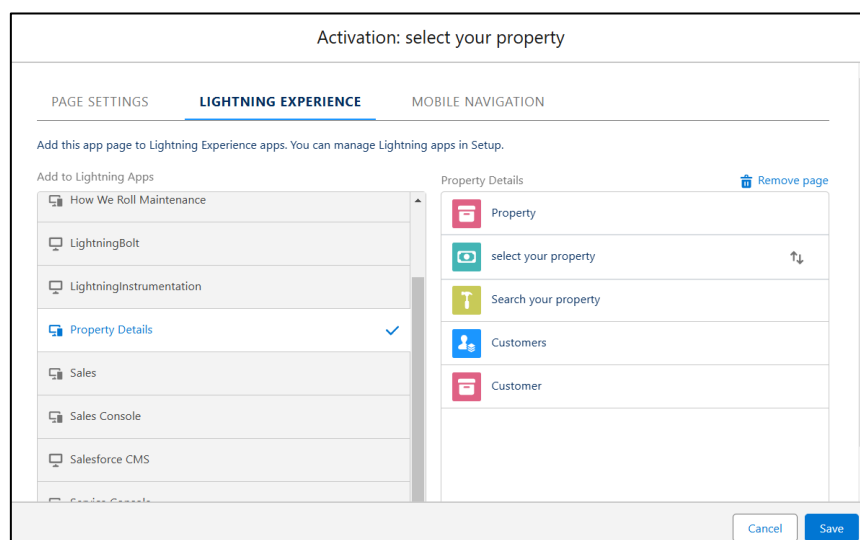
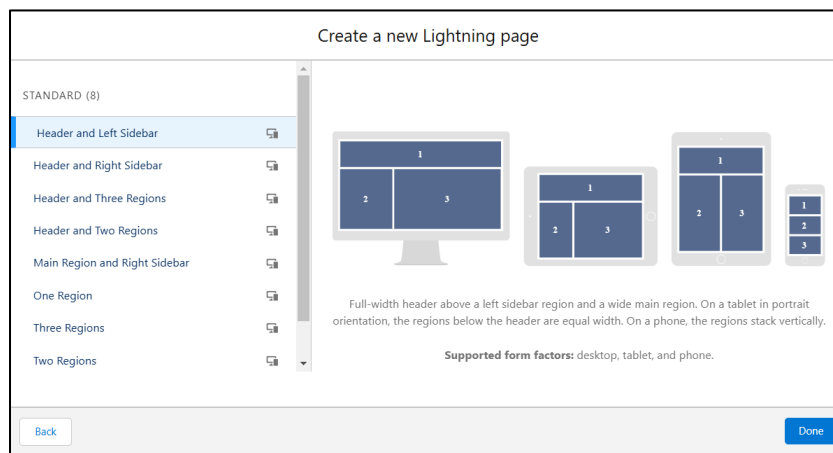
Create an App Page

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

Activity :- 1

1. From Setup >> Go to Lightning App Builder >> Click on New >> Select App Page and
2. Click on Next
3. Give Label as "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 Setting select page activation as "Activate for all Users".
7. From Lightning Experience Click on "Property Details" and click on Add Page".

8. Then Click on "Save"



Create a LWC Component

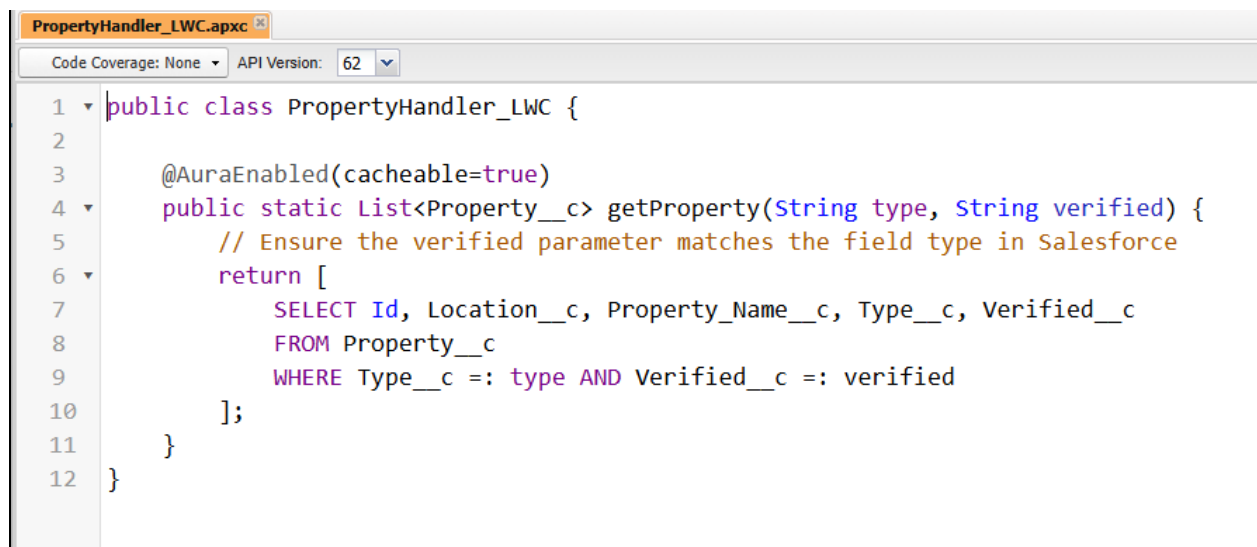
Create an LWC Component for the customers so that only verified customers can access the verified properties and non Verified customers can access non verified properties, and deploy it on "Search your Property Page"

Activity :- 1

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

Code:

```
public class PropertyHandler_LWC {
    @AuraEnabled(cacheable=true)
    public static List<Property__c> getProperty(String type, String verified) {
        // Ensure the verified parameter matches the field type in Salesforce
        return [
            SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c
            FROM Property__c
            WHERE Type__c =: type AND Verified__c =: verified
        ];
    }
}
```



```
PropertyHandler_LWC.apxc
Code Coverage: None API Version: 62
1 public class PropertyHandler_LWC {
2
3     @AuraEnabled(cacheable=true)
4     public static List<Property__c> getProperty(String type, String verified) {
5         // Ensure the verified parameter matches the field type in Salesforce
6         return [
7             SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c
8             FROM Property__c
9             WHERE Type__c =: type AND Verified__c =: verified
10        ];
11    }
12 }
```

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

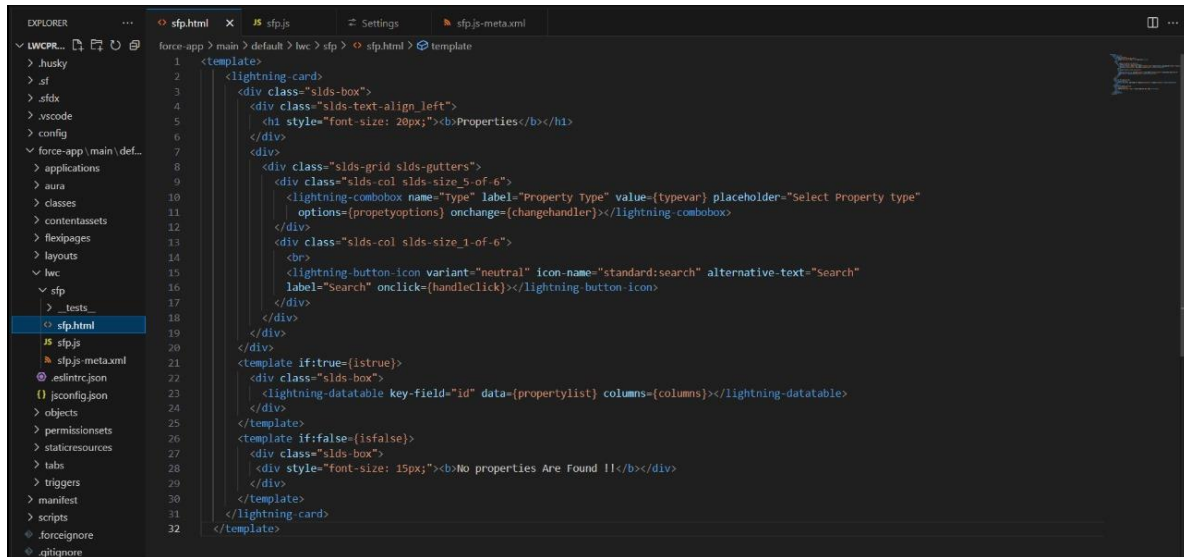
Code:

```
<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>
    </template>
    <template if:false={isfalse}>
      <div class="slds-box">
```

```

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

```



6. In your Js 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;
    istrue = false;
    @track propertylist = [];
    columns = [
        { label: 'Property Name', fieldName: 'Property_Name__c' },
        { label: 'Property Type', fieldName: 'Type__c' },
        { label: 'Property Location', fieldName: 'Location__c' },
        { label: 'Property link', fieldName: 'Property_link__c' }
    ]
}

```

```

]
propetyoptions = [
  { 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)
    })
}
}

```

```

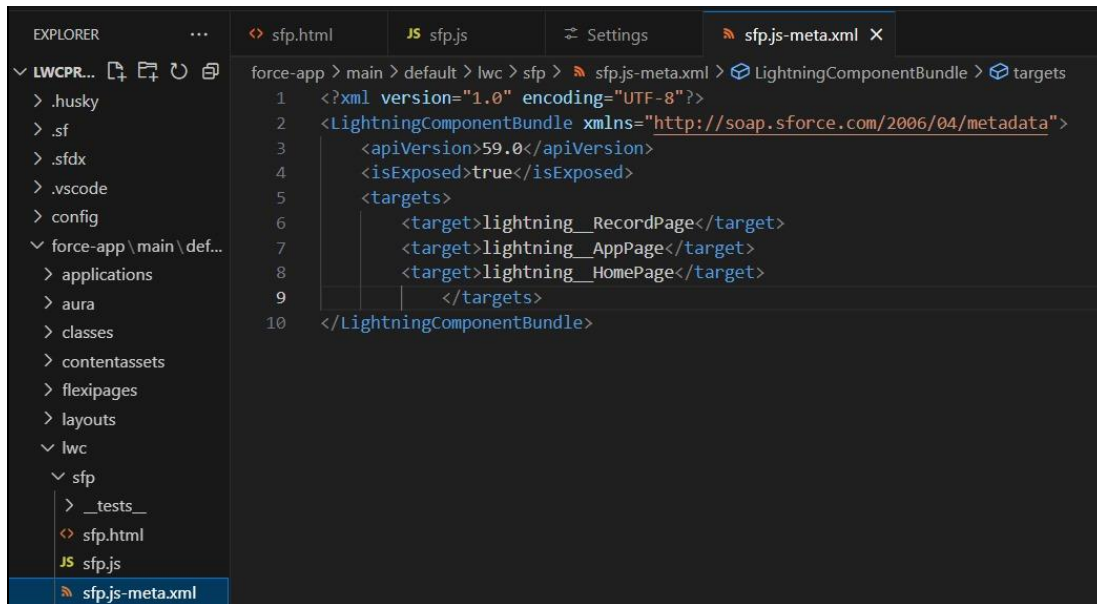
EXPLORER  ...  sfp.html  JS sfp.js  X  Settings  sfp.js-meta.xml
force-app > main > default > lwc > sfp > JS sfp.js > ...
1  import { LightningElement, api, track, wire } from 'lwc';
2  import getProperty from '@salesforce/apex/PropertyHandler_LWC.getProperty'
3  import { getRecord } from 'lightning/uiRecordApi';
4  import USER_ID from '@salesforce/user/Id';
5  export default class C_01_Property_Management extends LightningElement {
6
7      @api recordId
8      userId = USER_ID;
9      verifiedvar
10     typevar
11     isfalse = true;
12     istrue = false;
13     @track propertylist = [];
14     columns = [
15         { label: 'Property Name', fieldName: 'Property_Name__c' },
16         { label: 'Property Type', fieldName: 'Type__c' },
17         { label: 'Property Location', fieldName: 'Location__c' },
18         { label: 'Property link', fieldName: 'Property_link__c' }
19     ]
20     propertyoptions = [
21         { label: 'Commercial', value: 'Commercial' },
22         { label: 'Residential', value: 'Residential' },
23         { label: 'rental', value: 'rental' }
24     ]
25     @wire(getRecord, { recordId: '$userId', fields: ['User.Verified__c'] })
26     recordFunction({ data, error }) {
27         if (data) {
28             console.log(data)
29             console.log('This is the User Id ---> ' + this.userId);
30             this.verifiedvar = data.fields.Verified__c.value;
31         } else {
32             console.error(error)
33             console.log('this is error')
34         }
35     }
36     changehandler(event) {
37         console.log(event.target.value);
38         this.typevar = event.target.value;
39     }
40     handleClick() {
41         getProperty({ type: this.typevar, verified: this.verifiedvar })
42             .then((result) => {
43                 this.isfalse = true;
44                 console.log(result)
45                 console.log('This is the User id ---> ' + this.userId);
46                 console.log('This is the verified values ---> ' + this.verifiedvar);
47                 if (result != null && result.length != 0) {
48                     this.istrue = true;
49                     this.propertylist = result;
50                     console.log(this.verifiedvar);
51                     console.log(this.typevar)
52                 } else {
53                     this.isfalse = false;
54                     this.istrue = false;
55                 }
56             })
57             .catch((error) => {
58                 console.log(error)
59             })
60     }
61 }

```

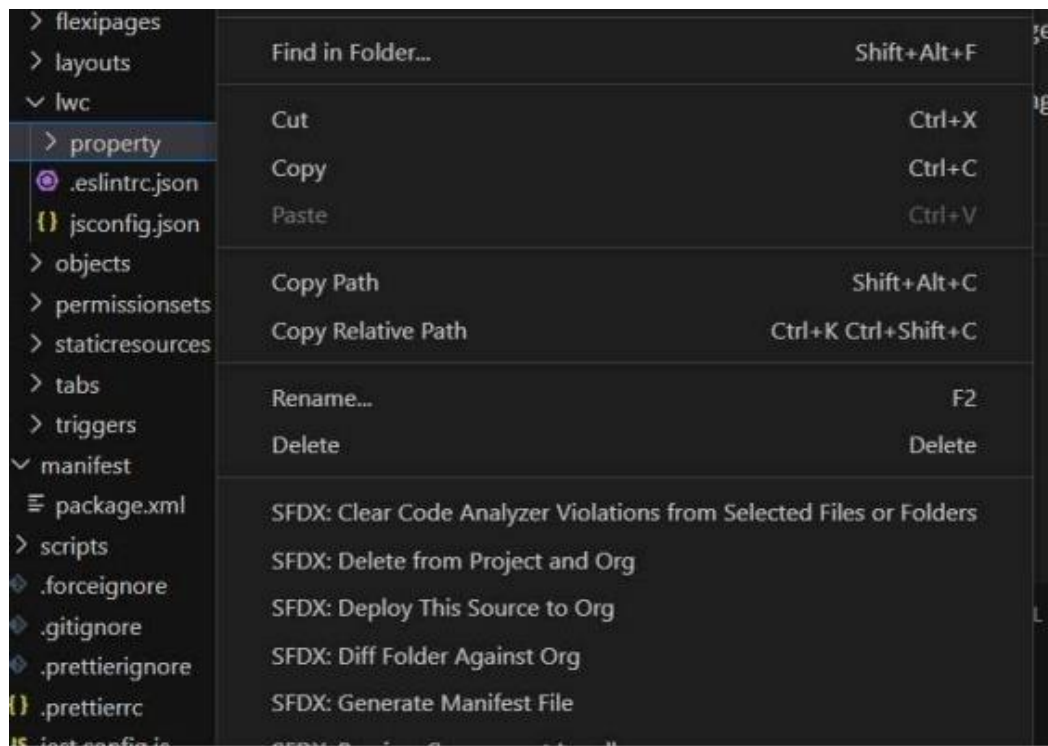
7. In your Metafile, give your targets to deploy the component.

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>
```



8. After saving all the three codes, right click and deploy this component to the org.

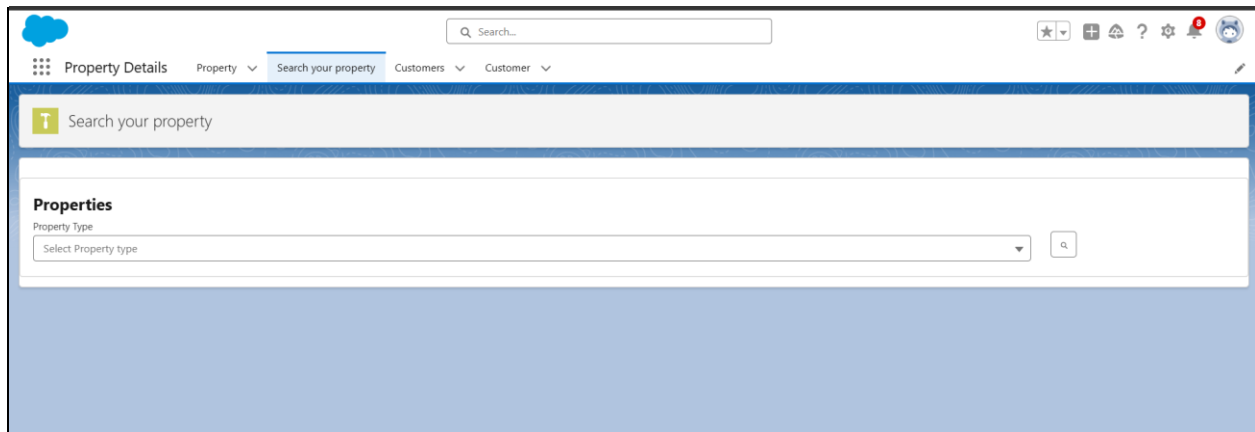


Drag this Component to your App Page

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 directed to app pages then
4. 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.

Activity :- 1

1. From Setup >> Search For Apex Classes >> Click on "Security" behind "PropertyHandler_LWC".
2. From Profiles Add "Manager" and "Customer" and "Save".

SETUP
Profiles

Enable Profile Access for Apex Class
PropertyHandler_LWC

Save Cancel

Available Profiles		Enabled Profiles
Analytics Cloud Integration User	Add Remove	Customer
Analytics Cloud Security User		Manager
Authenticated Website		System Administrator
B2B Reordering Portal Buyer Profile		
Contract Manager		
Cross Org Data Proxy User		
Custom: Marketing Profile		
Custom: Sales Profile		
Custom: Support Profile		
Customer Community Login User		
Customer Community Plus Login User		
Customer Community Plus User		
Customer Community User		
Customer Portal Manager Custom		