

# **A CRM Application to Handle the Clients and their property Related Requirements**

**By**

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## **Project Abstract**

Dreams World Properties has strategically integrated Salesforce to enhance client management and streamline property-related services. This integration automates the capture of customer information and preferences from the company's website, creating comprehensive profiles in Salesforce and reducing manual data entry errors. Customers are categorized into approved and non-approved segments, with approved users receiving personalized property recommendations tailored to their preferences, significantly enhancing their experience. Non-approved users still access a wide range of listings, ensuring suitability for all clients. This seamless integration optimizes operational efficiency by automating processes and freeing staff for strategic tasks, ultimately improving customer satisfaction and supporting growth in the competitive real estate market. Through Salesforce, Dreams World Properties offers superior customer service, personalized recommendations, and efficient management, establishing itself as a leader in the industry.

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## **INTRODUCTION**

Dreams World Properties has harnessed the power of Salesforce to revolutionize its client management and property-related services. By integrating Salesforce with its website, the company has automated the capture and organization of customer information and preferences, creating detailed profiles without the need for manual data entry. This sophisticated system categorizes users into approved and non-approved segments, allowing for personalized property recommendations that enhance the user experience for approved clients while still providing a broad range of listings for others. This integration not only optimizes operational efficiency but also frees up staff to focus on strategic tasks, ultimately improving customer satisfaction and driving growth in the competitive real estate market.

In an era where personalized customer service and efficient data management are crucial, Dreams World Properties' innovative approach sets it apart from competitors. The automation facilitated by Salesforce ensures that no customer detail is overlooked, and every interaction is recorded and utilized to enhance service delivery. The categorization system means that approved users receive tailored property suggestions, making their search more efficient and enjoyable, while non-approved users still have access to comprehensive listings, ensuring no potential client is left out. This seamless integration showcases Dreams World Properties' commitment to leveraging advanced technology to provide top-tier real estate services, demonstrating their leadership and forward-thinking in an ever-evolving industry. Through this innovative use of Salesforce, Dreams World Properties underscores its dedication to superior customer service, operational excellence, and effective management, solidifying its position as a frontrunner in the real estate market.

## **Task 1: 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.

### **Activity 1**

1. Creating a form to get the customer details like Name, Phone, Email, Address and type of property the customer is interested in.

My form - <https://form.jotform.com/242103954717052>

#### **Output:**

The screenshot shows a JotForm interface with the following fields:

- Logo:** Dreams World Properties logo featuring a stylized 'DW' monogram inside a circle.
- Title:** Dreams World
- Name:** A field divided into First Name and Last Name input boxes.
- Phone Number:** An input box with placeholder '(000) 000-0000'. Below it is an error message: "Please enter a valid phone number."
- Email:** An input box with placeholder "example@example.com".

Address

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

Which type of Property are you looking for?

RESIDENTIAL

COMMERCIAL

RENTAL

**Submit**

## Task 2: Create Objects from Spreadsheet.

Directly Creating Objects from Spreadsheet in Salesforce

### - Create Customer object

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer__c	Custom Object		29/07/2024	✓

### - Create Property object

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Property	Property__c	Custom Object		29/07/2024	✓

## Task 3: Integrate JotForm with Salesforce Platform

In this Milestone we are going to integrate jotform with Salesforce

### Activity 1

1. Integrate Jotform with Salesforce to create Customer records.

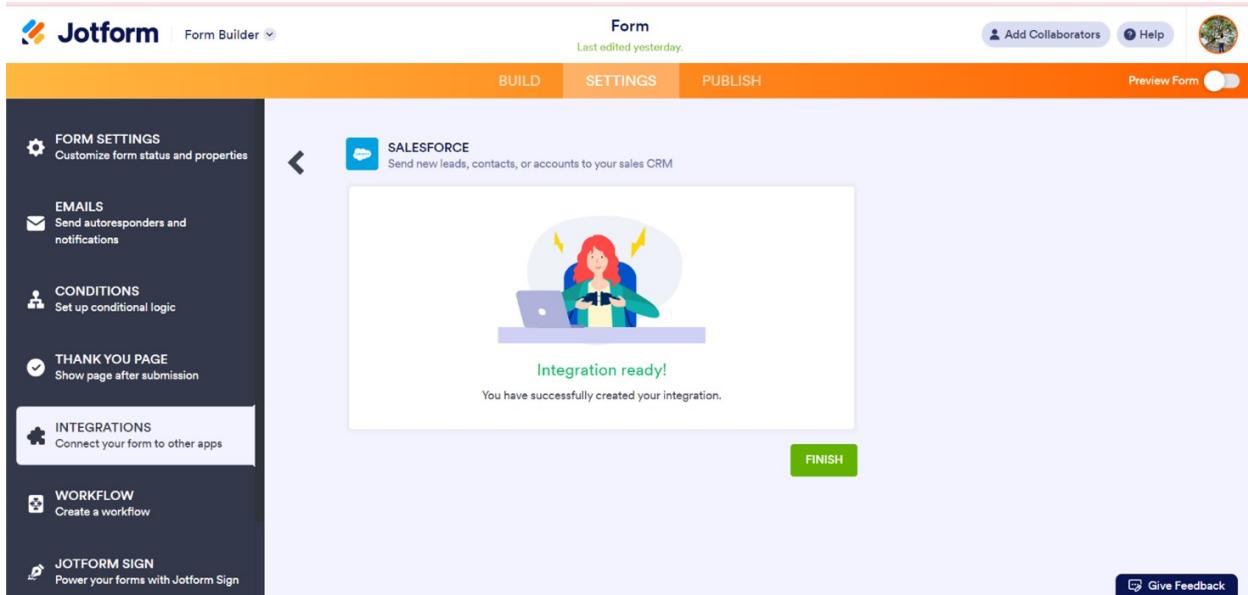
The image consists of two vertically stacked screenshots of the JotForm platform interface, showing the configuration of an integration with Salesforce.

**Screenshot 1: Integration Status**

This screenshot shows the "INTEGRATIONS" section of the JotForm builder. A successful integration with "SALESFORCE" is displayed, featuring a cartoon illustration of a person at a desk with a laptop. The status message says "Integration up and running! You have successfully created your integration." Buttons for "REMOVE INTEGRATION" and "EDIT INTEGRATION" are visible.

**Screenshot 2: Action Configuration**

This screenshot shows the "INTEGRATIONS" section again, but the "SALESFORCE" configuration screen is open. It displays an "All Actions" list with one item: "Create a record Customer". A "See Error Logs" link and a "+ Add New Action" button are also present. A "SAVE INTEGRATION" button is prominently displayed at the bottom right.



## Task 4: Create Roles

Create Roles as per business requirement

### 1. Sales Executive Role

- Create a hierarchical role structure in Salesforce: Sales Executive below Sales Representative, Sales Manager below Sales Executive, and Customer below Sales Manager.

Setup Home Object Manager

Q: rol

**SETUP Roles**

**Sales Executive**

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: dbs > CEO > Sales Representative > Sales Executive

[Users in Sales Executive Role \[0\]](#)

**Role Detail**

	Label	Role Name
This role reports to	Sales Executive	Sales_Executive
Modified By	gouragari.srinidhi, 30/07/2024, 9:20 pm	Role Name as displayed on reports
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Sharing Groups
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	Role, Role and Internal Subordinates

Help for this Page ?

Setup Home Object Manager

Q: rol

**SETUP Roles**

**Sales Manager**

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: dbs > CEO > Sales Representative > Sales Executive > Sales Manager

[Users in Sales Manager Role \[1\]](#)

**Role Detail**

	Label	Role Name
This role reports to	Sales Executive	Sales_Manager
Modified By	gouragari.srinidhi, 30/07/2024, 9:21 pm	Role Name as displayed on reports
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Sharing Groups
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	Role, Role and Internal Subordinates

Help for this Page ?

Setup Home Object Manager

Q: rol

**SETUP Roles**

**Customer**

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: dbs > CEO > Sales Representative > Sales Executive > Sales Manager > Customer

[Users in Customer Role \[2\]](#)

**Role Detail**

	Label	Role Name
This role reports to	Sales Manager	Customer
Modified By	gouragari.srinidhi, 30/07/2024, 9:21 pm	Role Name as displayed on reports
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities	Sharing Groups
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases	Role, Role and Internal Subordinates

Help for this Page ?

## Task 5: Create a Property Details App

An App where the objects will be displayed

### Activity 1

1. Create a new Lightning App named “Property Details” and add “Customer” and “Property” objects, then assign it to the “System Admin” profile.

The screenshot shows the 'Lightning Experience App Manager' interface. At the top, there are buttons for 'New Lightning App' and 'New Connected App'. Below that is a table with columns: App Name, Developer Name, Description, Last Modified, App Type, and View. There is one entry: 'Property Details' by 'Property\_Details' with a description of 'Property\_Details'. The last modified date is '30/07/2024, 9:50 pm' and the app type is 'Lightning'.

The screenshot shows the 'App Settings' tab in the 'Lightning App Builder'. The left sidebar has sections for App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles. The main area is titled 'App Details & Branding' and contains fields for 'App Name' (Property Details), 'Developer Name' (Property\_Details), 'Image' (a placeholder box with an 'Upload' button), 'Primary Color Hex Value' (#0070D2), and 'Description' (Enter a description...). There is also an 'Org Theme Options' section with a checkbox for 'Use the app's image and color instead of the org's custom theme'. An 'App Launcher Preview' shows a blue square with 'PD' and the text 'Property Details'.

The screenshot shows the 'App Options' tab in the 'Lightning App Builder'. The left sidebar has sections for App Details & Branding, Navigation Items, and User Profiles. The main area is titled 'App Options' and contains sections for 'Navigation and Form Factor' (with 'Navigation Style' set to 'Standard navigation') and 'Setup and Personalization'. Under 'Setup and Personalization', 'Setup Experience' is set to 'Setup (full set of Setup options)' and 'App Personalization Settings' includes checkboxes for 'Disable end user personalization of nav items in this app', 'Disable temporary tabs for items outside of this app', and 'Use Omni-Channel sidebar'.

Lightning App Builder | App Settings | Pages | Property Details | ? Help

### App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)**
- Navigation Items
- User Profiles

#### Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item      Utility Bar Alignment: Default

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

To enable the utility bar for this app, add a utility item.

Lightning App Builder | App Settings | Pages | Property Details | ? Help

### App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items**
- User Profiles

#### Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items      Selected Items

Available Items	Selected Items
Accounts	Customers
All Sites	Property
Alternative Payment Methods	Search your Property
Analytics	
App Launcher	
Appointment Categories	
Appointment Invitations	
Approval Requests	

Lightning App Builder | App Settings | Pages | Property Details | ? Help

### App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles**

#### User Profiles

Choose the user profiles that can access this app.

Available Profiles      Selected Profiles

Available Profiles	Selected Profiles
Analytics Cloud Integration User	Customer
Analytics Cloud Security User	Manager
Authenticated Website	
Authenticated Website	

## Task 6: Create Profiles

Create profiles as per business requirement

### 1. Customer

- Clone the Salesforce Platform User profile, name it “Customer,” adjust custom app settings to include only Property Details, remove all standard object permissions, and set read and view all permissions for the Property object.

The screenshot shows the Salesforce Setup interface under the Profiles section. The 'Customer' profile is selected. In the Profile Detail section, the Name is 'Customer', User License is 'Salesforce Platform', and Description is 'gouragari.srinidhi'. The Modified By field shows 'gouragari.srinidhi' with a timestamp of '30/07/2024, 6:23 pm'. The Page Layouts section lists various standard object layouts assigned to the profile, such as Global Layout for Account and Home Page Default for Home Page Layout. The right side of the screen shows a list of users assigned to this profile.

The screenshot shows the Salesforce Setup interface under the Profiles section, specifically the Standard Object Permissions page. The 'Customer' profile is selected. The page displays a grid of standard objects (Accounts, Addresses, Assets, etc.) with permission checkboxes for Read, Create, Edit, Delete, View All, and Modify All. Most checkboxes are checked for most objects, except for some like Business Brands and Communication Subscriptions which have fewer checked permissions. The right side of the screen shows a list of users assigned to this profile.

The screenshots illustrate the configuration of a custom profile in Salesforce. In the first screenshot, under 'Custom App Settings', the 'Property Details' checkbox is checked for the 'Customer' object. In the second screenshot, under 'Custom Object Permissions', the 'Modify All' checkbox is checked for the 'Customer' object across various standard and custom objects.

## 1. Manager

- Clone the Salesforce Platform User profile, name it "Manager," then ensure only "Property Details" is checked in Custom App Settings, remove all Standard Object Permissions, uncheck all Custom Object Permissions, and enable "Modify All" for "Property" and "Customer."

The screenshot shows the 'Profile Detail' section for the 'Manager' profile. It displays the profile name ('Manager'), user license ('Salesforce Platform'), and creation details ('Created By: gouragari.srinidhi 30/07/2024, 6:44 pm'). The 'Custom Profile' checkbox is checked.

Setup Home Object Manager

Q prof

Users Profiles

Didn't find what you're looking for? Try using Global Search.

### Profiles

	Visible	Default	Visible	Default
Invoice	<input type="checkbox"/>	<input type="checkbox"/>	Walllist Participant	<input type="checkbox"/>
Invoice Line	<input type="checkbox"/>	<input type="checkbox"/>	Walllist Service Resource	<input type="checkbox"/>
Lead	<input type="checkbox"/>	<input type="checkbox"/>	Walllist Work Type	<input type="checkbox"/>
Location	<input type="checkbox"/>	<input type="checkbox"/>	Web Store Inventory Source	<input type="checkbox"/>
Location Group	<input type="checkbox"/>	<input type="checkbox"/>	Work Type	<input type="checkbox"/>
Location Group Assignment	<input type="checkbox"/>	<input type="checkbox"/>	Work Type Group	<input type="checkbox"/>
Object Milestone	<input type="checkbox"/>	<input type="checkbox"/>	Work Type Group Member	<input type="checkbox"/>
Custom Field-Level Security			Customer	<input type="checkbox"/>
Applng	<input type="checkbox"/>	<input type="checkbox"/>	Property	<input type="checkbox"/>
Customer	<input type="checkbox"/>	<input type="checkbox"/>		
Custom App Settings			Property Details (Property_Details)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input type="checkbox"/>	User Access & Permissions Assistant (Profile2PermSet_Profiles_to_Permission_Sets)	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input type="checkbox"/>	WDC (standard_Work)	<input type="checkbox"/>
Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Connected App Access				
User Access and Permissions Assistant	<input type="checkbox"/>			
Service Provider Access				
Tab Settings				
Standard Tab Settings				
Home	Default On		Individuals	Tab Hidden
Accounts	Default On		Inventory Item Reservations	Tab Hidden
All Sites	Tab Hidden		Inventory Reservations	Tab Hidden
Alternative Payment Methods	Tab Hidden		Invoices	Tab Hidden

Setup Home Object Manager

Q prof

Users Profiles

Didn't find what you're looking for? Try using Global Search.

### Profiles

#### Standard Object Permissions

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

#### Custom Object Permissions

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

#### Platform Event Permissions

	Basic Access		Basic Access	
	Read	Create	Read	Create
AppLogEvents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#### Session Settings

Session Times Out After	2 hours of inactivity	Session Security Level Required at Login
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## Task 7: Create a Check Box field on user

Create Field on the User as per the business requirement.

### Activity 1

1. In Object Manager, search for "User," go to Fields and Relationships, and create a new field named "Verified" with the data type "Check Box."

The screenshot shows the Salesforce Object Manager interface for creating a custom field. The top navigation bar includes 'SETUP > OBJECT MANAGER' and 'User'. The left sidebar lists various layout types: User Page Layouts, User Profile Page Layouts, Lightning Record Pages, Buttons and Links, Compact Layouts, Field Sets, Object Limits, Related Lookup Filters, Search Layouts, List View Button Layout, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'User Custom Field Verified' and shows the 'Fields & Relationships' tab selected. A 'Custom Field Definition Detail' section contains fields like 'Field Label' (Verified), 'Field Name' (Verified\_c), 'Object Name' (User), and 'Data Type' (Checkbox). Other sections include 'General Options' (Default Value: Unchecked) and 'Validation Rules' (No validation rules defined). A 'WhatsApp' button is visible at the bottom right.

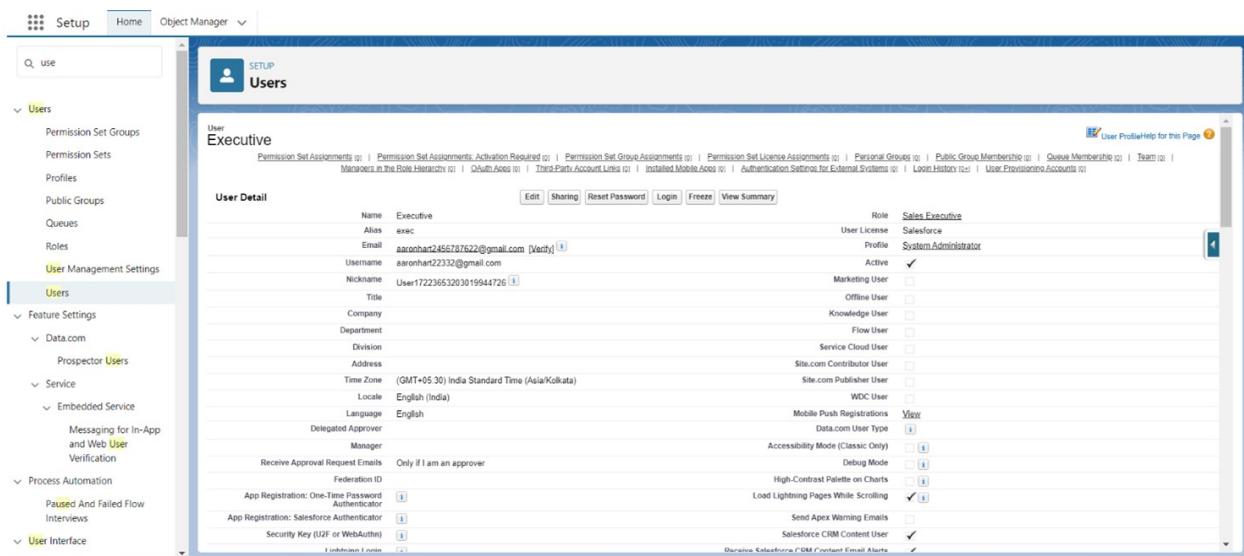
The screenshot shows the Salesforce Object Manager interface displaying a list of fields for the User object. The top navigation bar includes 'SETUP > OBJECT MANAGER' and 'User'. The left sidebar lists various layout types. The main content area is titled 'Fields & Relationships' and shows a list of 57 items, sorted by Field Label. The list includes fields such as SAML Federation ID, Show external indicator, Start of Day, Stay-in-Touch Email Note, Stay-in-Touch Email Signature, Stay-in-Touch Email Subject, Time Zone, Title, Url for Android banner photo, Url for banner photo, Url for iOS banner photo, Url for medium profile photo, Username, and Verified. The 'Verified' field is highlighted. A 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', and 'Field Dependencies' are at the top right. A vertical scroll bar is visible on the right side of the list.

## Task 8: Create Users

Create three different users with three different Roles and profiles as we have mentioned above.

### 1. User 1

- In Setup, navigate to Administration > Users > New User, fill in the Last Name as "Executive," set the Role to "Sales Executive," select the License as "Salesforce," choose the Profile as "System Administrator," and save.



### - User 2

- In Setup, navigate to Administration > Users > New User, fill in the Last Name as "Manager," set the Role to "Sales Manager," select the License as "Salesforce Platform," choose the Profile as "Manager," and save.

**Active Users**

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: [Active Users](#) | [Edit](#) | [Create](#) | [New](#) | [View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Manager	manu	tedkim44443@gmail.com	Sales Manager	<input checked="" type="checkbox"/>	Manager

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

**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) | Managed in the Role Hierarchy (0) | OAuth Areas (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Software for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

**User Detail**

Name	Manager	Role	Sales Manager
Alias	manu	User License	Salesforce Platform
Email	tedkim45@gmail.com [Valid]	Profile	Manager
Username	tedkim44443@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User1722355648138470677	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"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">View</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Passcode Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (2FA or WebAuthn)		Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>

[Dynamically Generated Content Alerts as Placeholder](#)

## - User 3

- In Setup, navigate to Administration > Users > New User, fill in the Last Name as "Customer," set the Role to "Customer," select the License as "Salesforce Platform," choose the Profile as "Customer," ensure the "Verified" check box is unchecked, and save.

The screenshots illustrate the process of creating a new user in Salesforce:

- User Management Settings (Top Screenshot):** Shows the 'User Detail' page for a user named 'Customer'. The 'Role' is set to 'Customer', 'User License Profile' is 'Salesforce Platform', and 'Active' is checked. Other details like Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, and various checkboxes for mobile push notifications and accessibility modes are visible.
- Active Users (Middle Screenshot):** Shows a list of active users. It includes columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The list contains three entries: 'Chatter Expert' (Alias: Chatter, Username: chatter), 'Customer' (Alias: cust, Username: marketing4455integrationuser@cloudmouth.com), and 'Customer2' (Alias: cust, Username: aaronchart25422@gmail.com).
- New User Creation (Bottom Screenshot):** Shows the 'Users' setup page with fields for City, Zip/Postal Code, State/Province, Country, Single Sign On Information (Federation ID), Additional Information (Verified checkbox), and Locale Settings.

**-User 4**

- In Setup, navigate to Administration > Users > New User, fill in the Last Name as "Customer2," set the Role to "Customer," select the License as "Salesforce Platform," choose the Profile as "Customer," ensure the "Verified" check box is checked, and save

Setup Home Object Manager

Users

### Active Users

On this page you can create, view, and manage users. To get more licenses, use the Your Account app. Let's Go.

View: Active Users | Edit | Create | New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatv00ddm000003ufb-5ue-3xaribui3cm@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit   Login Customer	cust	markete445integrationuser@cloudmouth.com	Customer	<input checked="" type="checkbox"/>	Customer
<input type="checkbox"/>	Edit   Login Customer2	cust	aaronhan25622@gmail.com	Customer	<input checked="" type="checkbox"/>	Customer

New User | Reset Password(s) | Add Multiple Users

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

Setup Home Object Manager

Users

### User Customer2

User Profile Help for this Page

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

User Detail

Name	Customer2	Role	Customer
Alias	cust	User License	Salesforce Platform
Email	aaronhan25622@gmail.com [Valid]	Profile	Customer
Username	aaronhan25622@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User1723557098881219680	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"/>
Language	English	Mobile Push Registration	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input checked="" type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (2FA or WebAuthn)		Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>

User Provisioning Details

Setup Home Object Manager

Users

### User

Single Sign On Information

City:   
Zip/Postal Code:   
State/Province:   
Country:

Additional Information

Federation ID:   
Verified:

# Task 9: Create an Approval Process for Property Object

An Approval process to approve or reject the records as according

## - Activity 1

- In Setup, navigate to Process Automation > Approval Process, create a "Property Approval"process with criteria "Location is not equal to blank" and "Verified equals false," set the next automated approver to "Manager," enable record editability for administrators or current approvers, display Property, Owner, Location, and Type on the approval page layout, set initial submitters as Property Owner and Sales Manager, save, add an approval step "Executive Approval" for all records with the approver "Sales Executive," save, add a field update "Verified Property" to set the Verified checkbox to True, add a field update "UnVerified Property" to set the Verified checkbox to False, and activate the approval process.

The image contains two screenshots of the Salesforce Setup interface, illustrating the steps to create an Approval Process for the Property object.

**Screenshot 1: Approval Processes - Property: Property Approval**

This screenshot shows the "Approval Processes" page with the "Property: Property Approval" process selected. The "Process Definition Detail" section includes:

- Process Name: Property Approval
- Unique Name: Property\_Approval
- Description: (Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS false)
- Record Editability: Administrator OR Current Approver
- Approval Assignment Email Template: Initial Submitters
- Initial Submitters: Property Owner, Role\_Sales Manager
- Created By: gouragai.srinidhi
- Modified By: gouragai.srinidhi
- Status: Active (checked)
- Next Automated Approver Determined By: Manager of Record Submitter
- Allow Submitters to Recall Approval Requests: unchecked

The "Initial Submission Actions" section contains:

- Action Type: Record Lock
- Description: Lock the record from being edited

The "Approval Steps" section contains:

- Action: Show Actions | Edit
- Step Number: 1
- Name: Executive Approval
- Description: (Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS false)
- Criteria: (Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS false)
- Assigned Approver: Manager
- Reject Behavior: Final Rejection

The "Final Approval Actions" section contains:

- Action Type: Edit
- Description: Lock the record from being edited

**Screenshot 2: Approval Process Edit - Step 1. Enter Name and Description**

This screenshot shows the "Step 1. Enter Name and Description" page of the Approval Process Edit wizard. The "Enter Name and Description" section includes:

- Process Name: Property Approval
- Unique Name: Property\_Approval
- Description: (Property: Location NOT EQUAL TO blank) AND (Property: Verified EQUALS false)

Buttons at the bottom include "Save", "Next", and "Cancel". A note indicates "1 Required information" is required.

**Step 2. Specify Entry Criteria**

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.

**Specify Entry Criteria**

Use this approval process if the following criteria are met:

Field	Operator	Value	Logic
Property_Location	not equal to	blank	AND
Property_Verified	equals	false	AND
...None...	...None...		AND
...None...	...None...		AND
...None...	...None...		

Add Filter Logic...

**Step 3. Specify Approver Field and Record Editability Properties**

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked—only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

**Select Field Used for Automated Approval Routing**

Next Automated Approver Determined By: Manager

Use Approver Field of Property Owner:

**Record Editability Properties**

Administrators ONLY can edit records during the approval process.  
 Administrators OR the currently assigned approver can edit records during the approval process.

**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**

- Created By
- Last Modified By
- Property Name
- Verified

**Selected Fields**

- Property Owner
- Location Type

Up ▲ Down ▼

Add Remove

Click here to view an example

**Approval Page Fields**

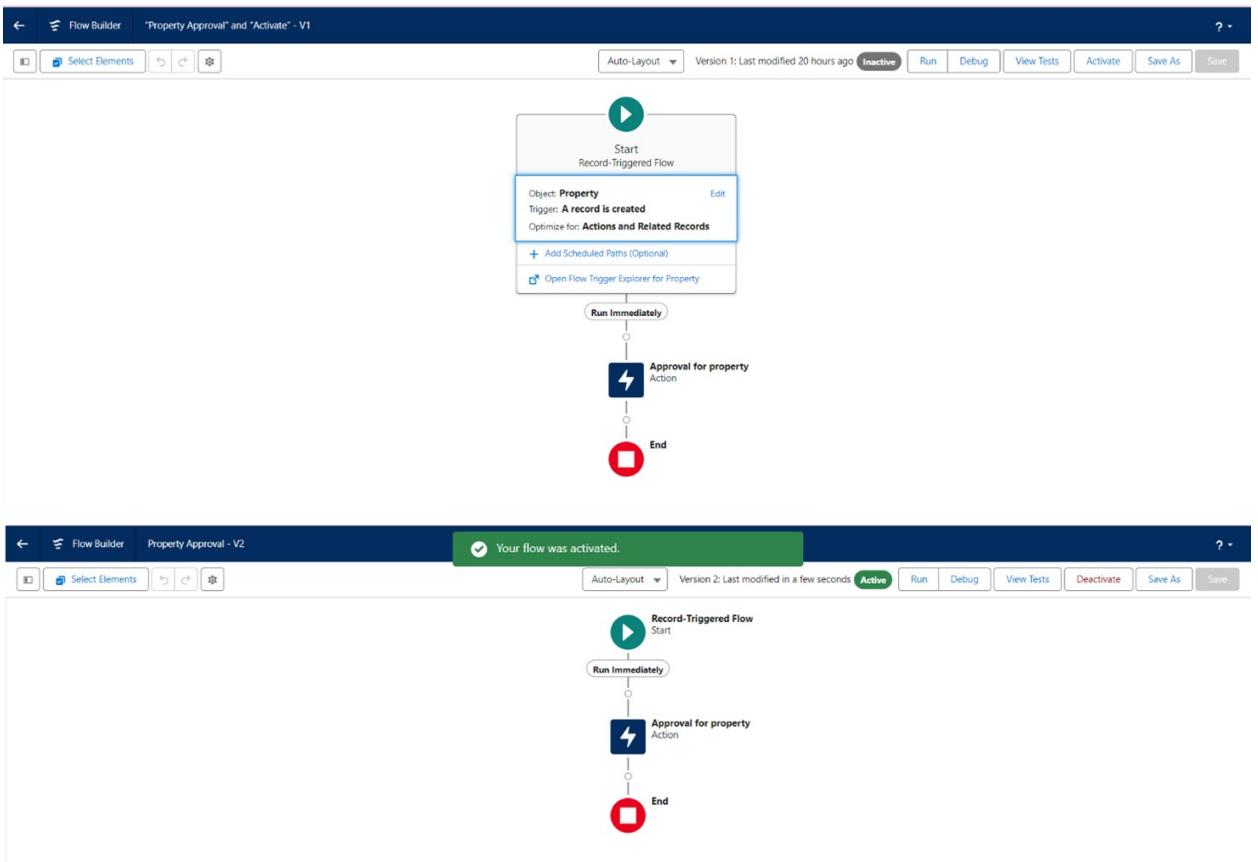
Display approval history information in addition to the fields selected above.

## Task 10: Create a Record trigger flow to submit the Approval Process Automatically.

A flow that can submit the records directly for approval

### Activity 1

- In Setup, search for Flows, click on New, select "Record Trigger Flow," choose the Property object, set the trigger to "A record is created," add an action "Submit for Approval" with the label "Approval for property" and Record Id as {!\$Record.Id}, save the flow with the label "Property Approval," and activate.



## Task 11: Create an App Page

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

### Activity 1

- In Setup, navigate to Lightning App Builder, create a new App Page with the label "Search your Property," choose "Header and Left Sidebar" layout, save and activate the page, select "Activate for all Users" from Page Settings, and in Lightning Experience, add the page to "Property Details," then save.

The screenshot shows the Lightning App Builder interface. On the left, there's a sidebar with a search bar and a list of components under 'Standard (25)'. The main area is a canvas with three empty component slots labeled 'Add Component(s) Here'. To the right, a configuration panel is open for a new page:

- Page** section:
  - Label**: Search your Property
  - API Name**: Search\_your\_Property
  - Page Type**: App Page
- Template**: Header and Left Sidebar
- Description**: (empty)
- Actions**: Select...

At the bottom left of the main area, there's a blue button: 'Get more on the AppExchange'.

This screenshot shows the 'Activation: Search your Property' step in the app builder. It displays the 'LIGHTNING EXPERIENCE' tab of the activation configuration. Under 'Add to Lightning Apps', the 'Property Details' app is selected. In the 'Property Details' section, the 'Search your Property' page is listed under 'Property'. The right side of the screen shows the same configuration panel as the previous screenshot, with the 'Label' set to 'Search your Property' and 'Page Type' set to 'App Page'.

This screenshot shows the 'Activation: Search your Property' step again, but now the configuration is complete. The 'PAGE SETTINGS' tab is active, showing the 'Name' field filled with 'Search your Property' and the 'Icon' field with a placeholder icon. The right side of the screen shows the final configuration panel with all fields filled out: Label: Search your Property, API Name: Search\_your\_Property, Page Type: App Page, Template: Header and Left Sidebar, Description: (empty), and Actions: Select... A 'Save' button is visible at the bottom right of the configuration panel.

## Task 12: 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

- Create an Apex class named "PropertyHandler\_LWC" and make it Aura enabled, then in VSCode, authorize your org, create a Lightning Web Component, write the provided code in the HTML, JS, and metafile, and deploy the component to the org.

The screenshot shows the Visual Studio Code interface with the following components visible:

- Code Editor:** Displays the Apex class `PropertyHandler_LWC`. The code implements a static method `getProperty` that queries the `Property__c` object based on the `type` parameter and the `verified` status.
- Logs:** Shows a log of test executions for the `ApexTestHandler`.
- File Explorer:** Shows the project structure with files like `new.js`, `new.html`, `new.meta.js`, and `new.html`.

File Edit Selection View Go ...

salesforce

OPEN EDITORS

- Welcome
- new.js
- new.html
- newjs-meta.xml

SALESFORCE

- force-app\main\default
- contentsets
- flexpages
- layouts
- lwc
- new
- \_tests\_
- new.html
- new.js
- newjs-meta.xml
- .eslintrc.json
- .jsconfig.json

OUTLINE

TIMELINE

CS SCRIPT - ACTIVE

RUNNING TASKS

Highlight Apex Code Coverage

```

<template>
  <lightning-card>
    <div class="slds-box">
      <div>
        </div>
      </div>
    <template if:true={istru}>
      <div class="slds-box">
        <lightning-datable key-field="id" data={propertylist} columns={columns}></lightning-datable>
      </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>

```

Ln 25, Col 18 Spaces: 2 UTF-8 LF HTML Go Live Prettier

File Edit Selection View Go ...

salesforce

OPEN EDITORS

- Welcome
- new.js
- new.html
- newjs-meta.xml

SALESFORCE

- force-app\main\default
- contentsets
- flexpages
- layouts
- lwc
- new
- \_tests\_
- new.html
- new.js
- newjs-meta.xml
- .eslintrc.json
- .jsconfig.json

OUTLINE

TIMELINE

CS SCRIPT - ACTIVE

RUNNING TASKS

Highlight Apex Code Coverage

```

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;
  istrue = true;
  isfalse = 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' }
  ];
  propertyoptions = [
    { 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) {
      this.propertylist = data.fields;
    }
  }
}

```

Ln 25, Col 2 Spaces: 2 UTF-8 LF HTML Go Live Prettier

File Edit Selection View Go ...

salesforce

OPEN EDITORS

- Welcome
- new.js
- new.html
- newjs-meta.xml

SALESFORCE

- force-app\main\default
- contentsets
- flexpages
- layouts
- lwc
- new
- \_tests\_
- new.html
- new.js
- newjs-meta.xml
- .eslintrc.json
- .jsconfig.json

OUTLINE

TIMELINE

CS SCRIPT - ACTIVE

RUNNING TASKS

Highlight Apex Code Coverage

```

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 {
  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 value ----> " + this.verifiedvar);
        if (result != null && result.length != 0) {
          this.istrue = true;
          this.propertylist = result;
          console.log(this.propertylist);
        }
      })
  }
}

```

Ln 45, Col 2 Spaces: 2 UTF-8 LF HTML Go Live Prettier

```

force-app > main > default > lwc > new > C_01_Property_Management
5   export default class C_01_Property_Management extends LightningElement {
29     handleClick() {
41       .then(result => {
42         this.isFalse = true;
43         console.log(result);
44         console.log('This is the user id ---> ' + this.useid);
45         console.log('This is the verified values ---> ' + this.verifiedvar);
46         if (result != null && result.length != 0) {
47           this.isTrue = true;
48           this.propertylist = result;
49           console.log(this.verifyidvar);
50           console.log(this.typevar)
51         } else {
52           this.isTrue = false;
53           this.isTrue = false;
54         }
55       })
56     .catch(error => {
57       console.log(error);
58     })
59   }
60 }

```

```

<?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>

```

PROBLEMS    OUTPUT    DEBUG CONSOLE    TERMINAL    PORTS    Salesforce CLI

```

18:13:22.864 ended SFDX: Deploy This Source to Org
18:51:17.450 Starting SFDX: Deploy This Source to Org

==== Deployed Source
STATE      FULL NAME      TYPE          PROJECT PATH
-----      -----      -----
Changed     new            LightningComponentBundle force-app\main\default\lwc\new\new.html
Changed     new            LightningComponentBundle force-app\main\default\lwc\new\new.js
Changed     new            LightningComponentBundle force-app\main\default\lwc\new\new.js-meta.xml

18:51:19.391 ended SFDX: Deploy This Source to Org

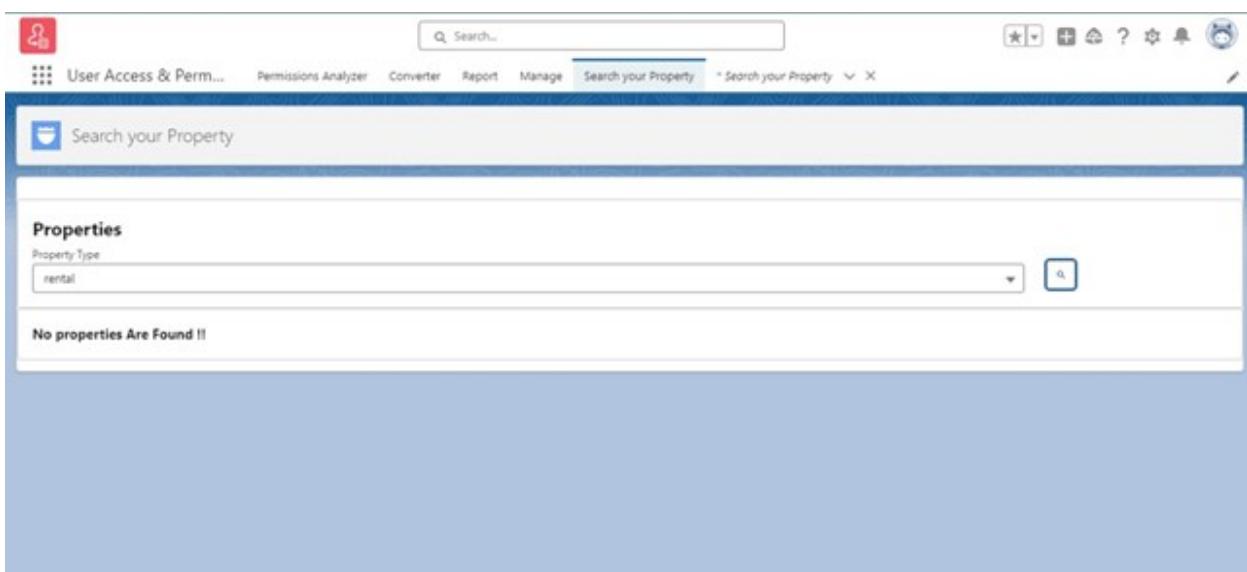
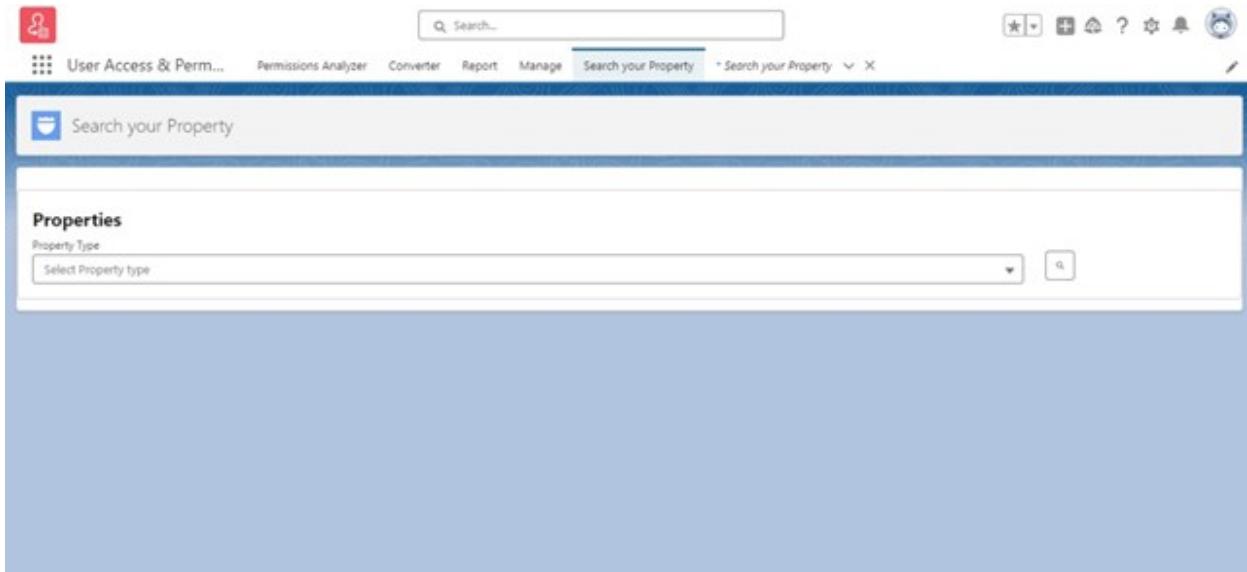
```

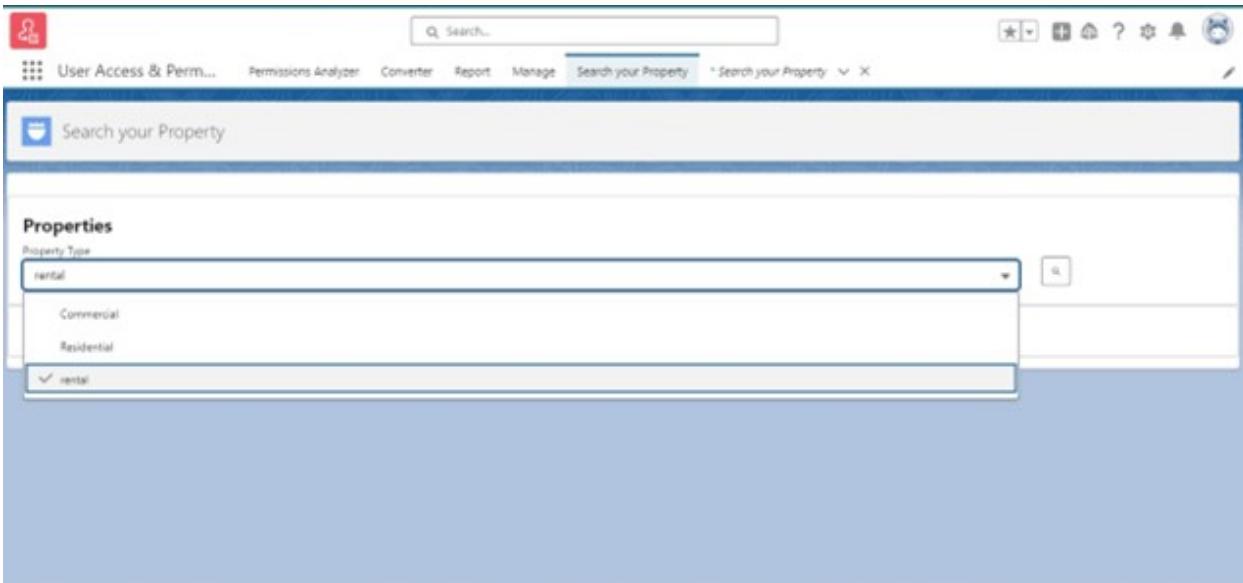
## Task 13: Drag this Component to your App Page

Adding the Component to your Page

### - Activity 1

In Setup, go to App Launcher, search for Property Details, click the gear icon to Edit Page, drag the component to your App Page, and save the page.



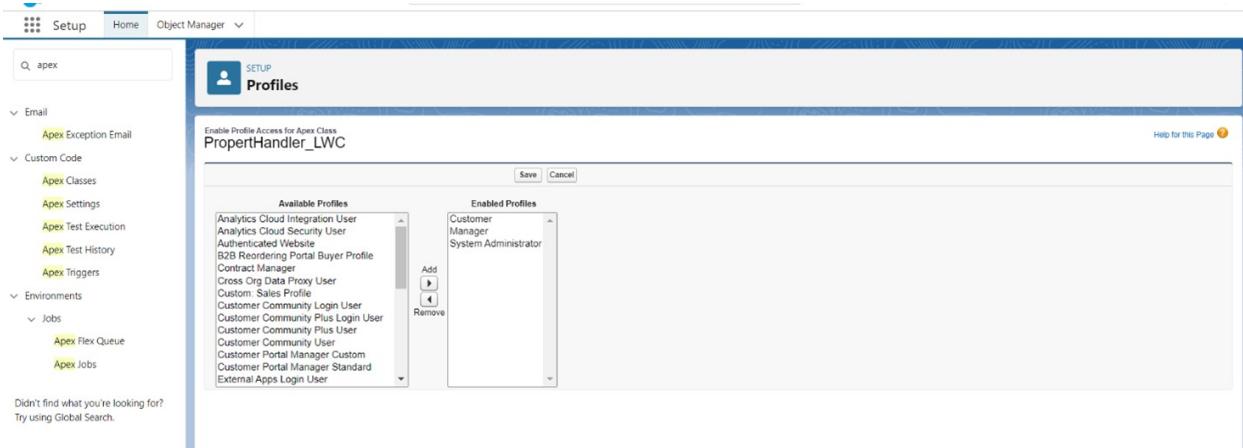


## Task 14: Give Access of Apex Classes to Profiles

The Apex Class has a Security, Enable the security for the profiles that needs to access this class.

### Activity 1

In Setup, search for Apex Classes, click on "Security" next to "PropertyHandler\_LWC," add the "Manager" and "Customer" profiles, and save.



The screenshot shows the Salesforce Setup interface with the 'Apex Classes' page selected. The left sidebar includes sections for Email, Custom Code, Environments, and Jobs. A search bar at the top left contains the text 'apex'. The main content area displays a table titled 'Apex Classes' with columns: Action, Name, Namespace Prefix, Api Version, Status, Size Without Comments, Last Modified By, and Has Trace Flags. The table lists several Apex classes, such as 'Package\_Test', 'PackageRestResource', 'permAnalyze', 'permAnalyzeTestData', 'permissionManager', 'PermissionsBatchCloner', 'PermissionsBatchCloner\_Test', 'permissionSetGroupsList', 'PermissionsHandler', 'PermissionsHelper\_Test', 'Ping\_Test', 'PingRestResource', 'profileConverter', and 'ProportionHandler\_LWC'. The last row, 'permissionsBatched', has a blue background.

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit	Package_Test	thsecurity	56.0	Active	2,949	gouragat.srinidhi  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	PackageRestResource	thsecurity	56.0	Active	796	gouragat.srinidhi  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	PackageSecurity	thsecurity	56.0	Active	720	gouragat.srinidhi  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	permAnalyze	Profile2PermSet	56.0	Active	28,120	Profile2PermSet  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	permAnalyzeTestData	Profile2PermSet	56.0	Active	11,900	Profile2PermSet  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	permissionManager	Profile2PermSet	56.0	Active	70,751	Profile2PermSet  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	PermissionsBatchCloner	Profile2PermSet	56.0	Active	982	Profile2PermSet  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit	PermissionsBatchCloner_Test	Profile2PermSet	56.0	Active	6,262	Profile2PermSet  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	permissionSetGroupsList	Profile2PermSet	56.0	Active	6,185	Profile2PermSet  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	PermissionsHandler	Profile2PermSet	56.0	Active	9,593	Profile2PermSet  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	PermissionsHelper_Test	Profile2PermSet	56.0	Active	19,077	Profile2PermSet  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit	Ping_Test	thsecurity	56.0	Active	816	gouragat.srinidhi  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	PingRestResource	thsecurity	56.0	Active	443	gouragat.srinidhi  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Security	profileConverter	Profile2PermSet	56.0	Active	9,049	Profile2PermSet  08/06/2024, 1:47 am	<input type="checkbox"/>
Edit   Del   Security	ProportionHandler_LWC	Profile2PermSet	61.0	Active	432	gouragat.srinidhi  31/07/2024, 6:12 pm	<input type="checkbox"/>
Edit   Security	permissionsBatched	Profile2PermSet	56.0	Active	49,723	Profile2PermSet  08/06/2024, 1:47 am	<input type="checkbox"/>

# THANK YOU!!