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

By

Gouragari Srinidhi
srinidhigouragari7@gmail.com

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.

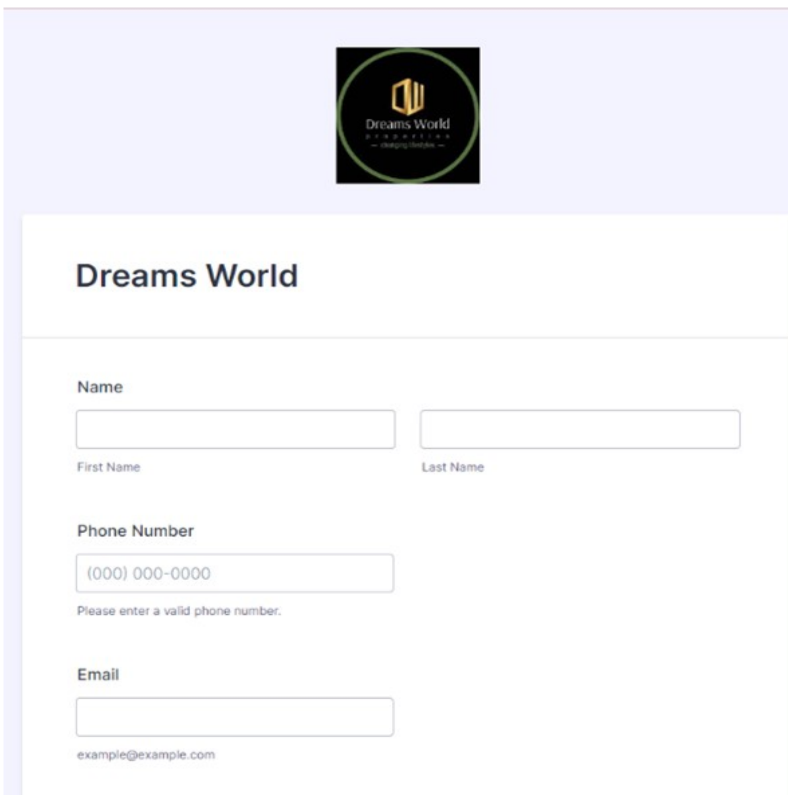
Client wants a form for the customers to get the details directly into the salesforce so that the admins can create a user in the org.

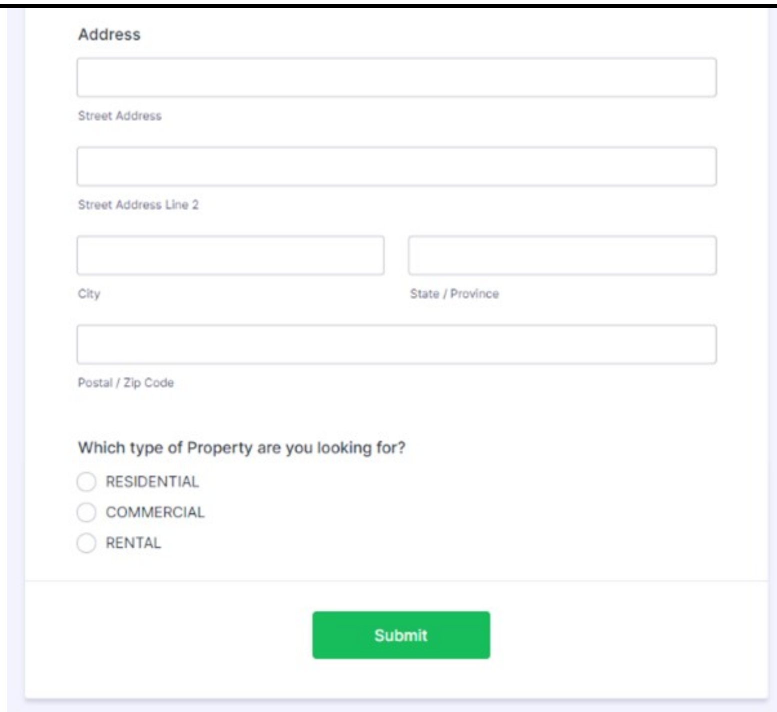
Activity 1

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:

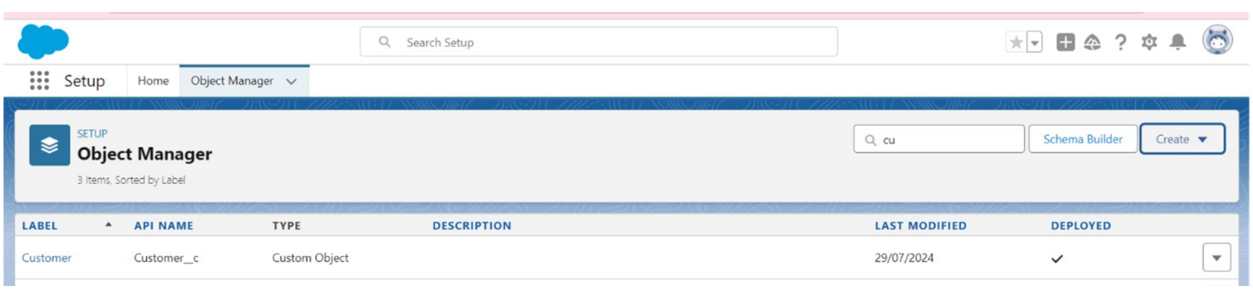




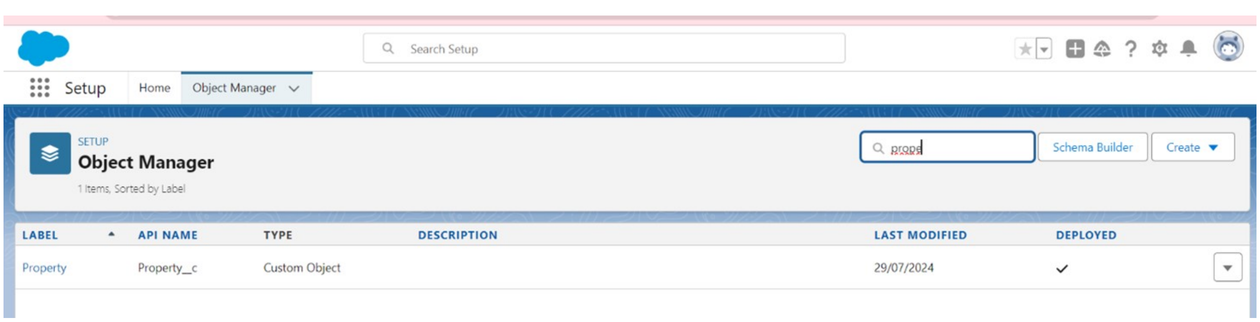
Task 2: Create Objects from Spreadsheet.

Directly Creating Objects from Spreadsheet in Salesforce

- Create Customer object



- Create Property object

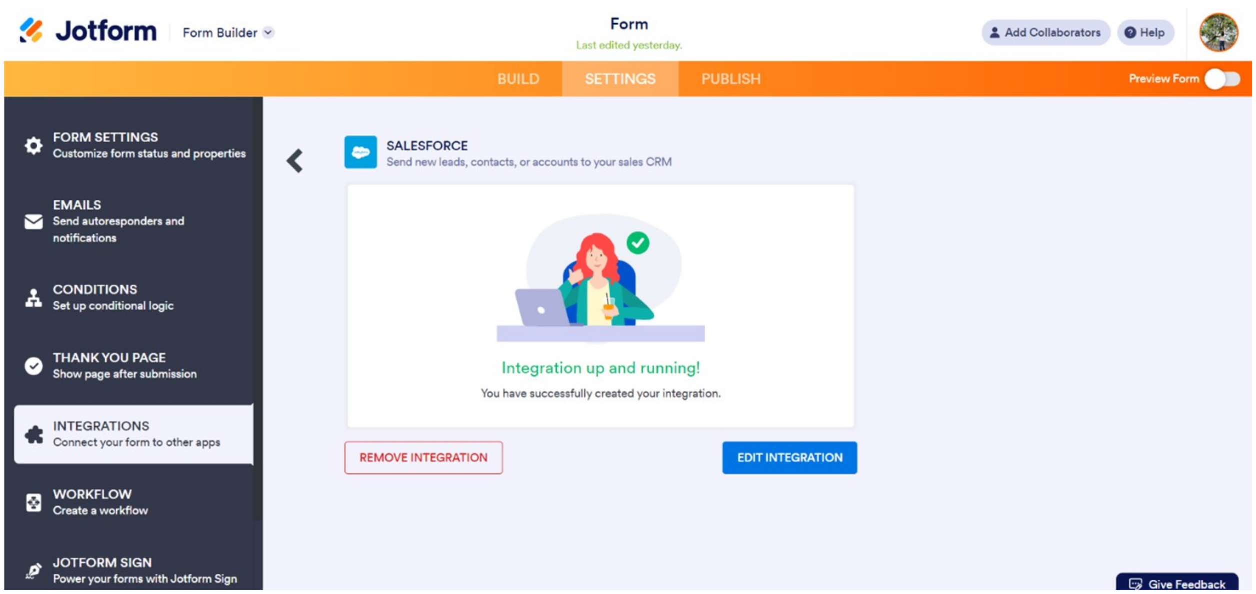


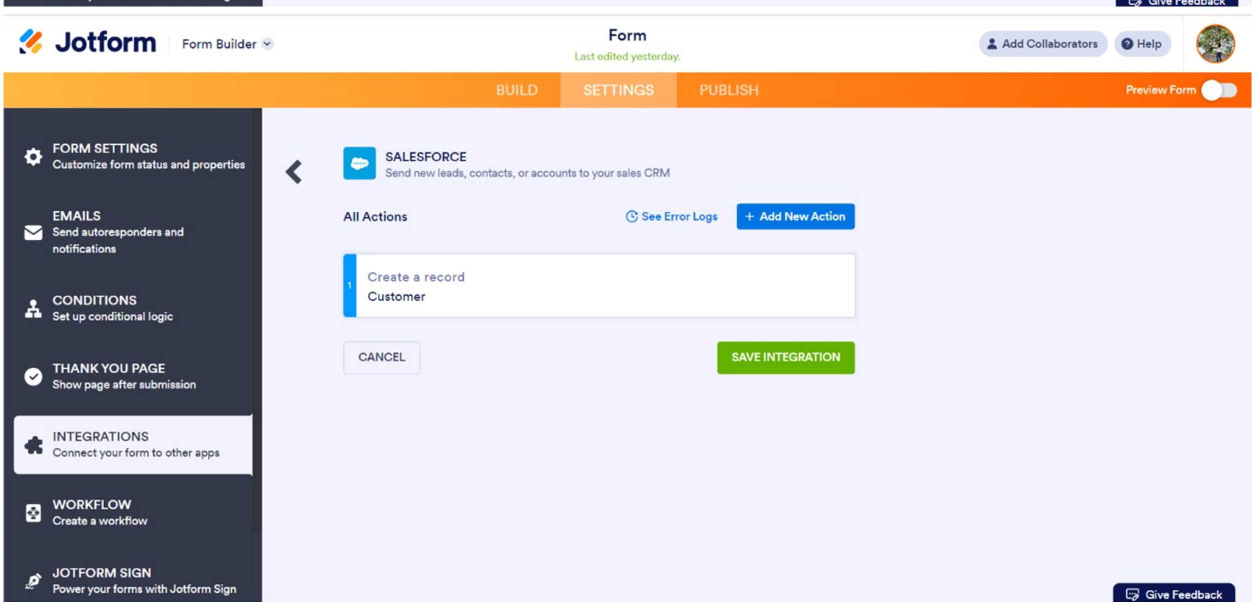
Task 3: Integrate JotForm with Salesforce Platform

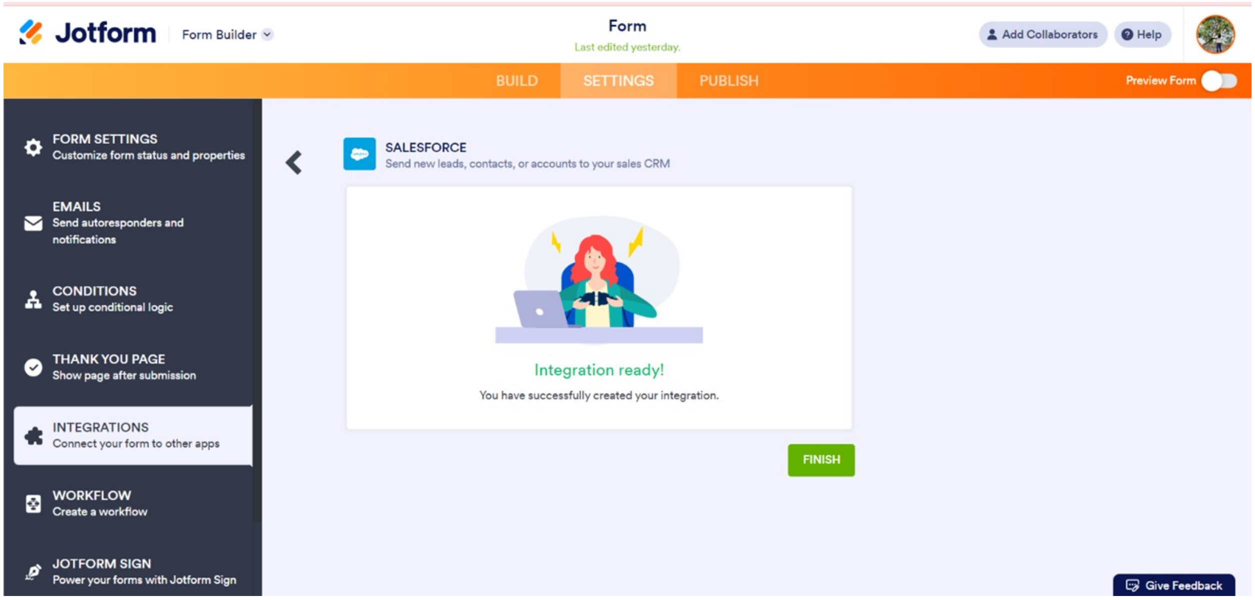
In this Milestone we are going to integrate jotform with Salesforce

Activity 1

1. Integrate Jotform with Salesforce to create Customer records.





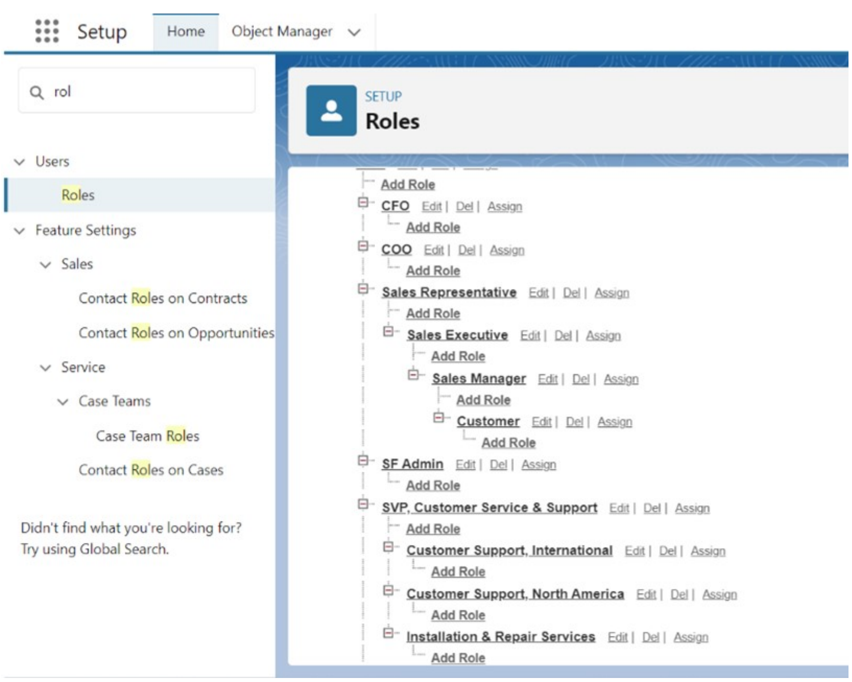


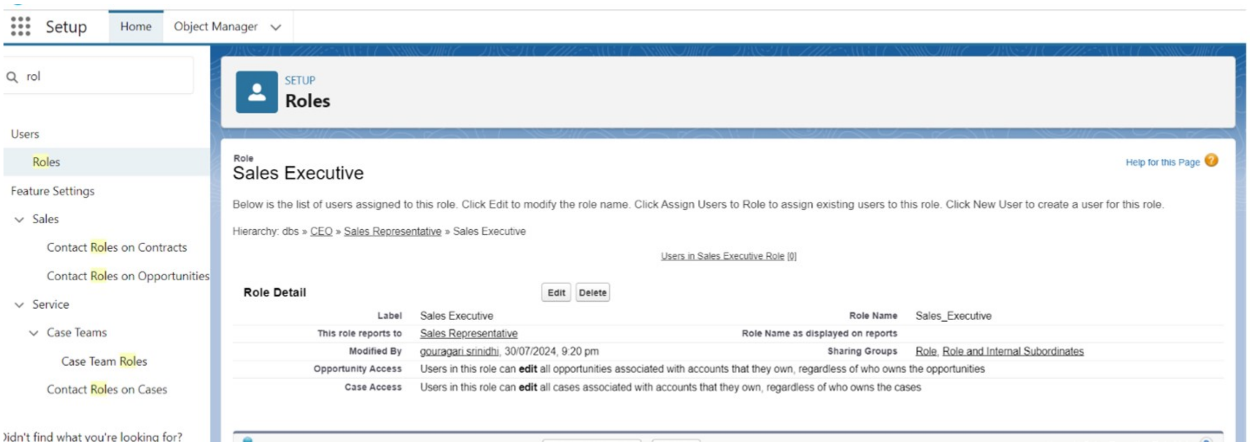
Task 4: Create Roles

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
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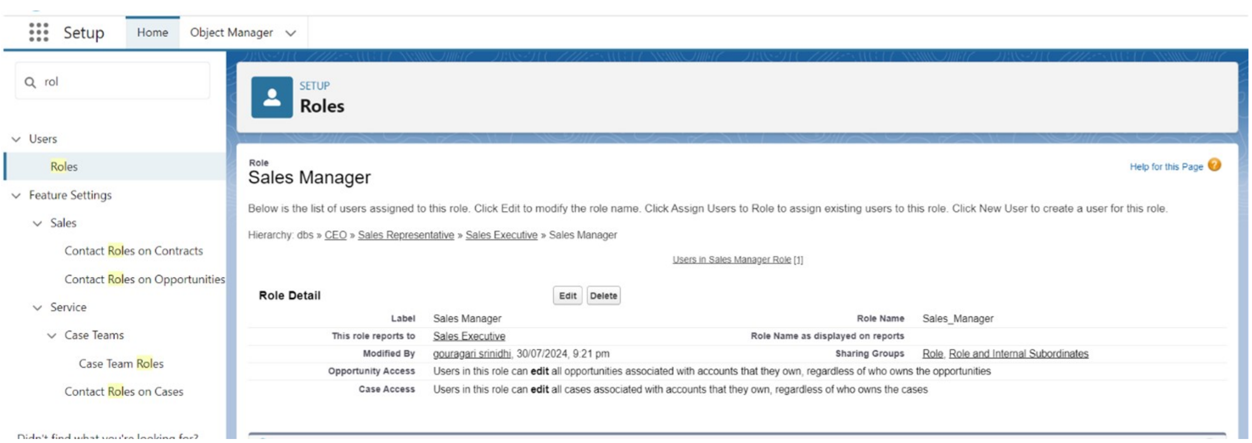
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
SETUP
Roles
Role
Sales Executive
Help for this Page
Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign 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
Edit
Delete
Label Sales Executive
Role Name Sales_Executive
This role reports to Sales Representative
Role Name as displayed on reports
Modified By gouragari srinidhi, 30/07/2024, 9:20 pm
Sharing Groups Role, Role and Internal Subordinates
Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases


Setup
Home
Object Manager
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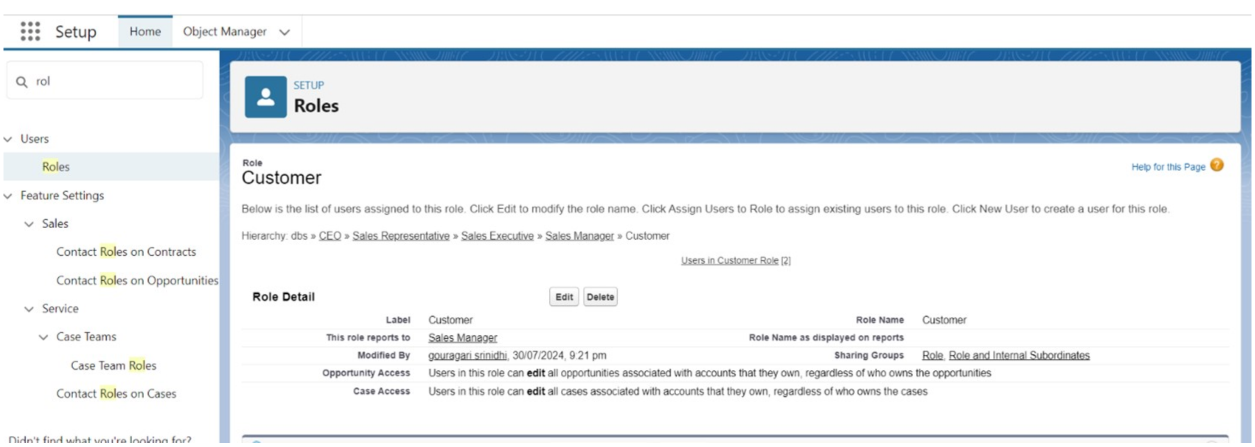
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
SETUP
Roles
Role
Sales Manager
Help for this Page
Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users 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
Edit
Delete
Label Sales Manager
Role Name Sales_Manager
This role reports to Sales Executive
Role Name as displayed on reports
Modified By gouragari srinidhi, 30/07/2024, 9:21 pm
Sharing Groups Role, Role and Internal Subordinates
Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases


Setup
Home
Object Manager
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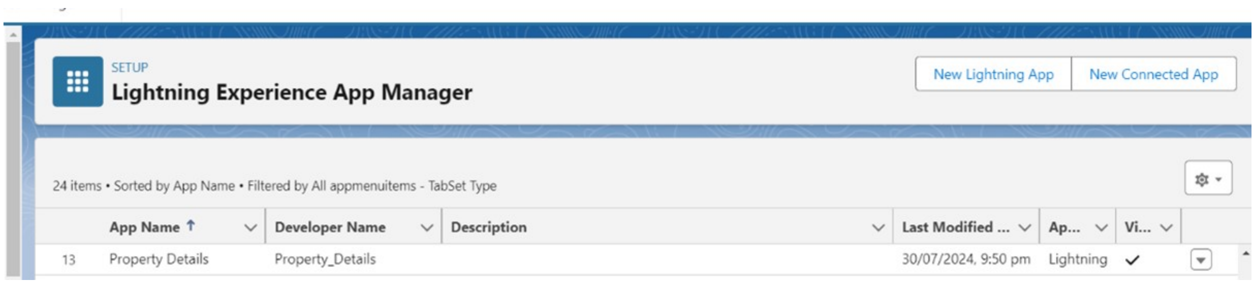
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
SETUP
Roles
Role
Customer
Help for this Page
Below is the list of users assigned to this role. Click Edit to modify 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
Edit
Delete
Label Customer
Role Name Customer
This role reports to Sales Manager
Role Name as displayed on reports
Modified By gouragari srinidhi, 30/07/2024, 9:21 pm
Sharing Groups Role, Role and Internal Subordinates
Opportunity Access Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

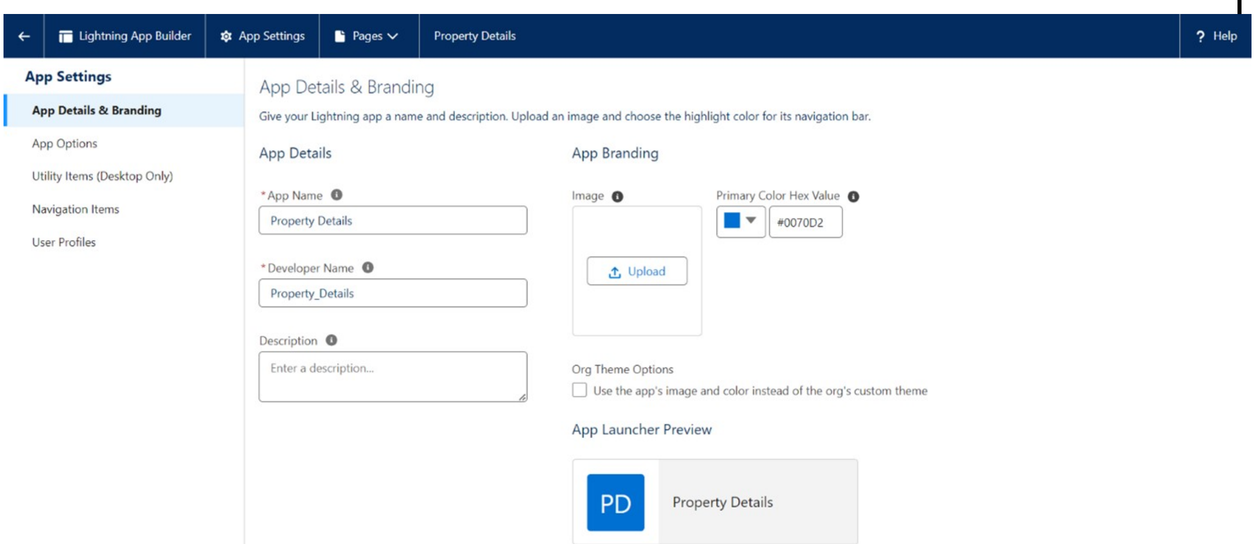
Task 5: Create a Property Details App

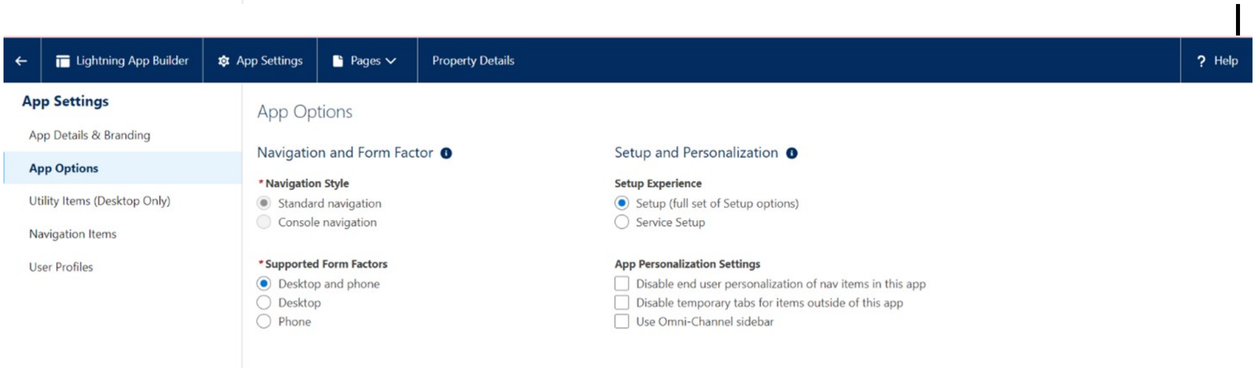
An App where the objects will be displayed

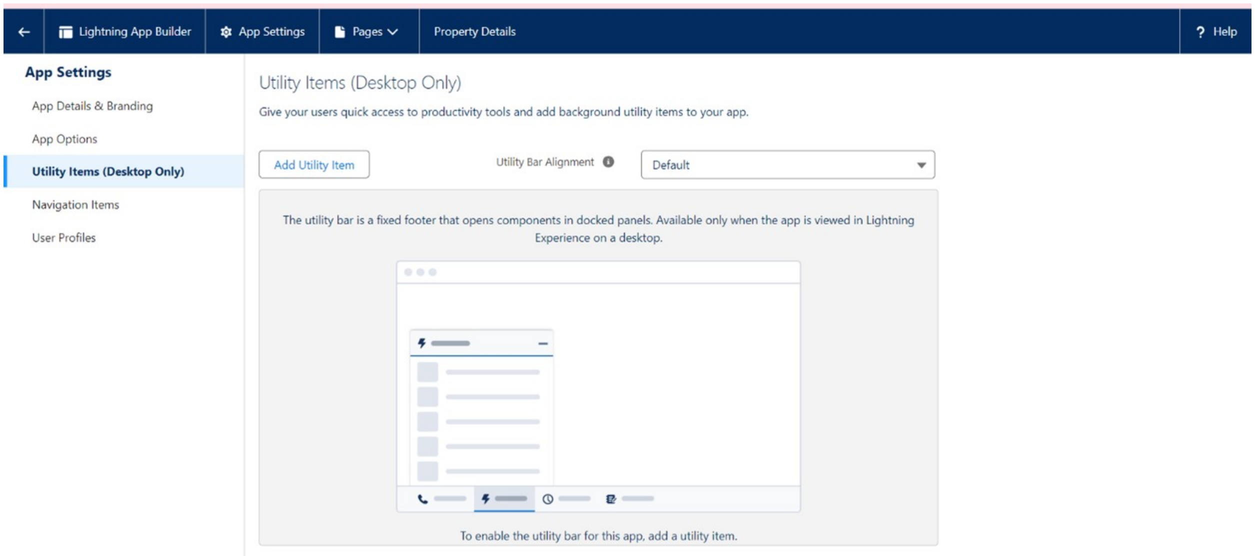
Activity 1

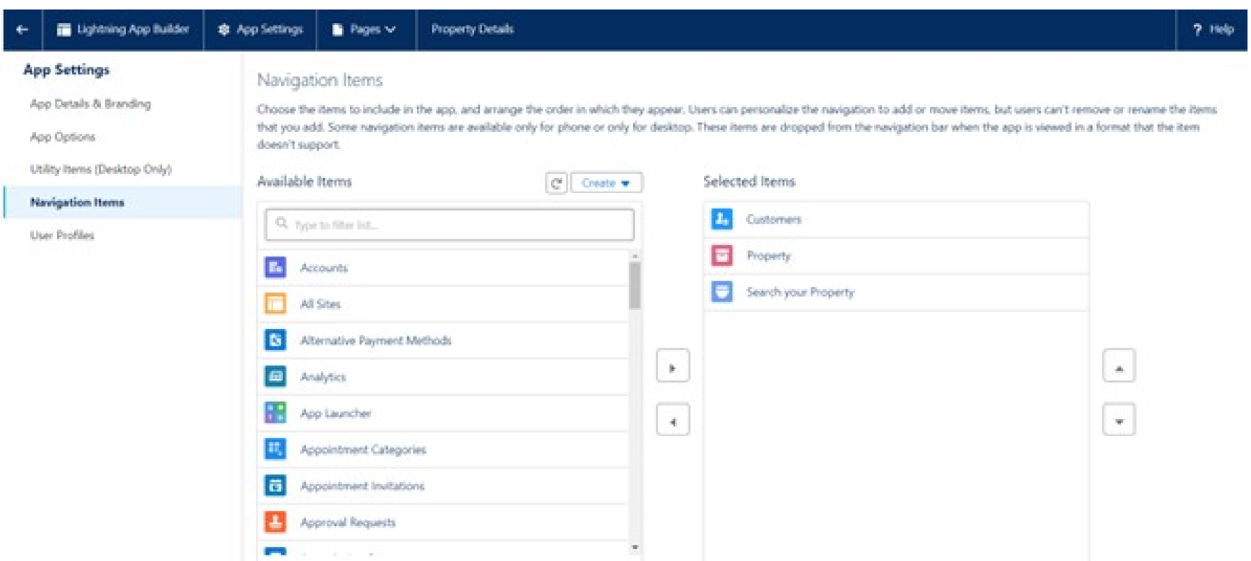
1. Create a new Lightning App named “Property Details” and add “Customer” and “Property” objects, then assign it to the “System Admin” profile.

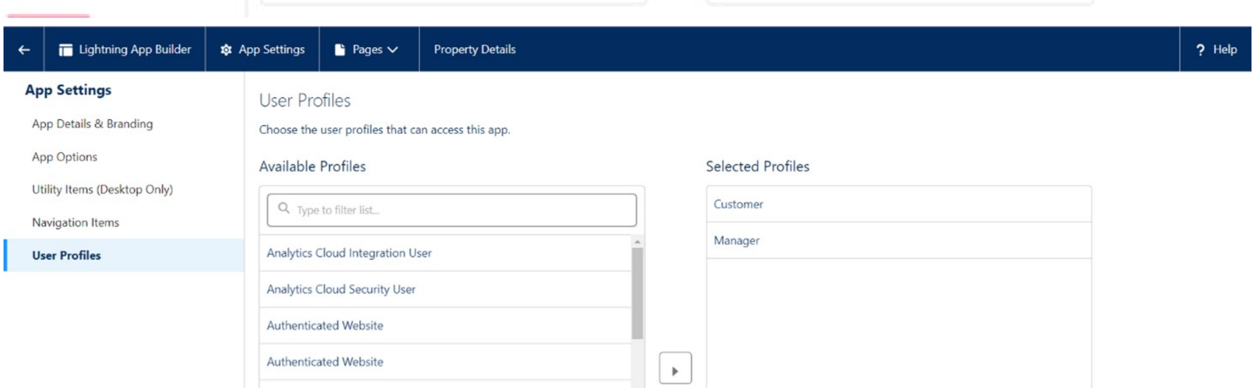







Lightning App Builder
App Settings
Pages
Property Details
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Utility Items (Desktop Only)
Give your users quick access to productivity tools and add background utility items to your app.
Add 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
Create
Type to filter list...
Accounts
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories
Appointment Invitations
Approval Requests
Selected Items
Customers
Property
Search your Property

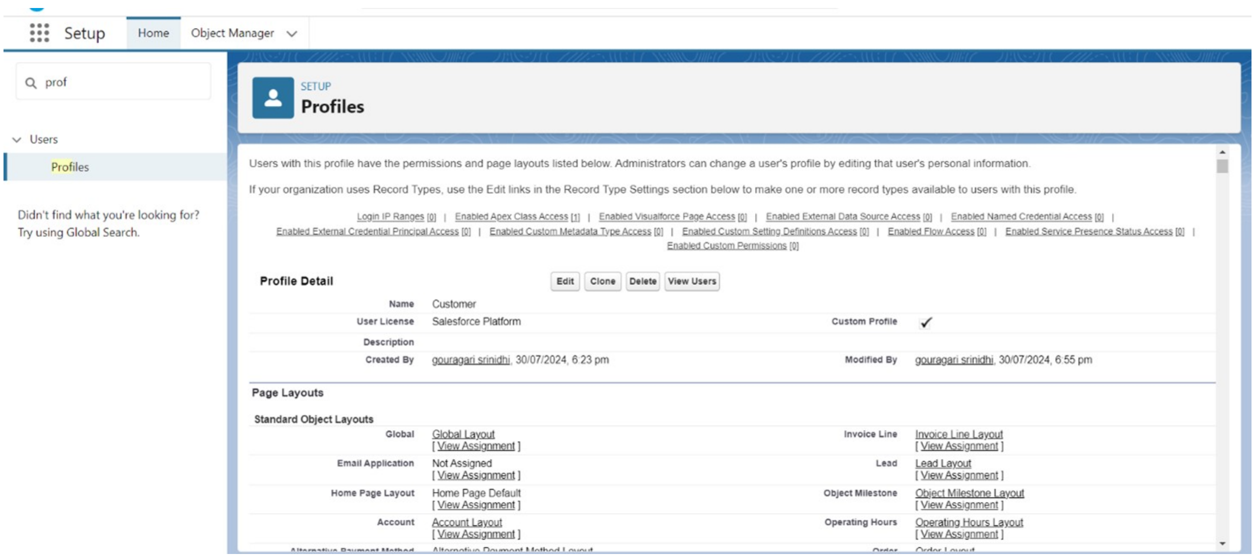

Lightning App Builder
App Settings
Pages
Property Details
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Selected Profiles
Customer
Manager

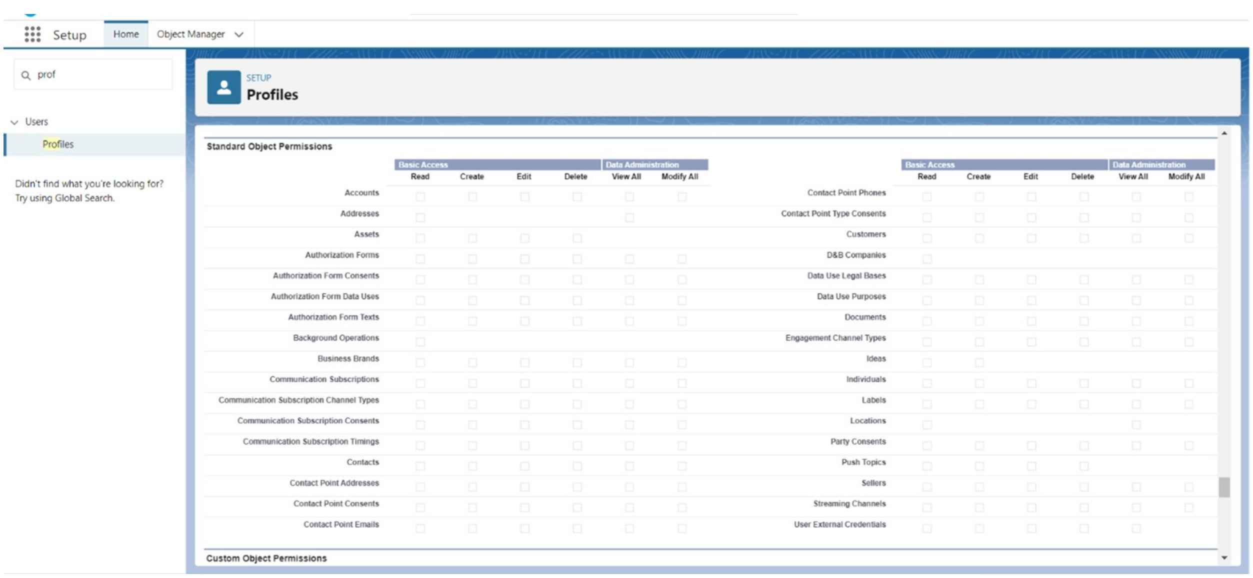
Task 6: Create Profiles

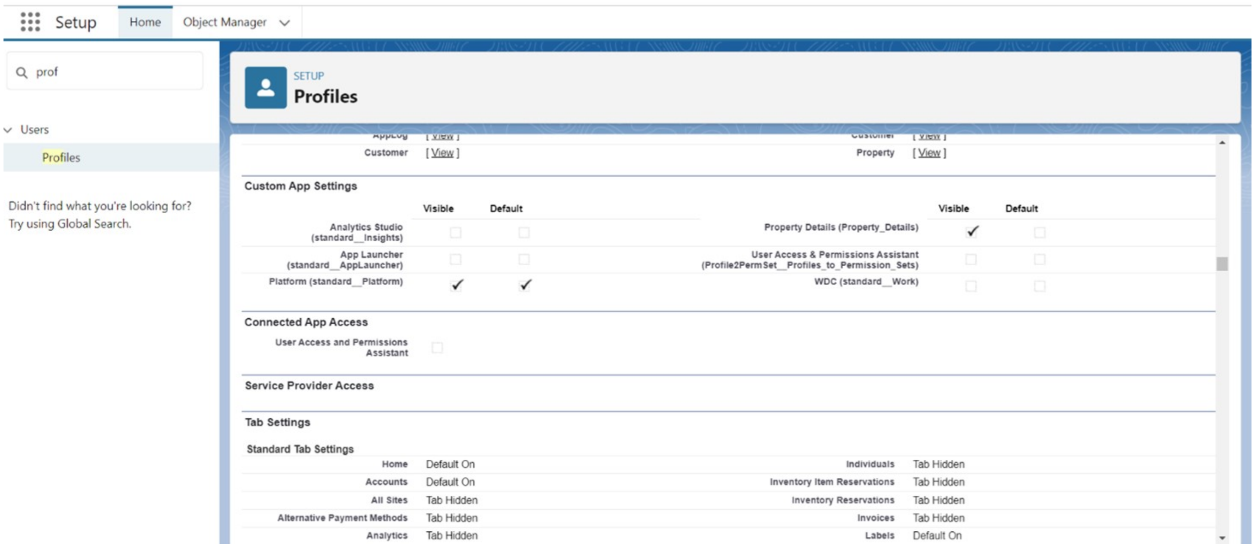
Create profiles as per business requirement

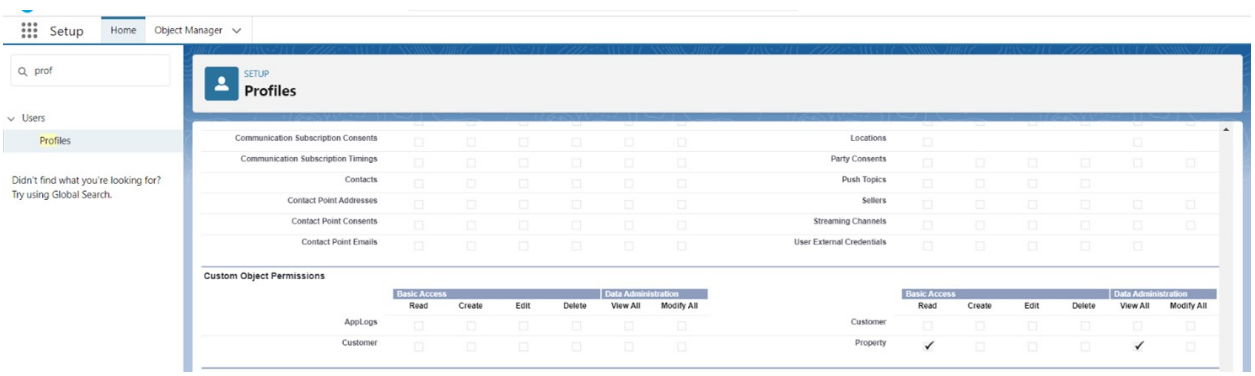
1. Customer

- 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.



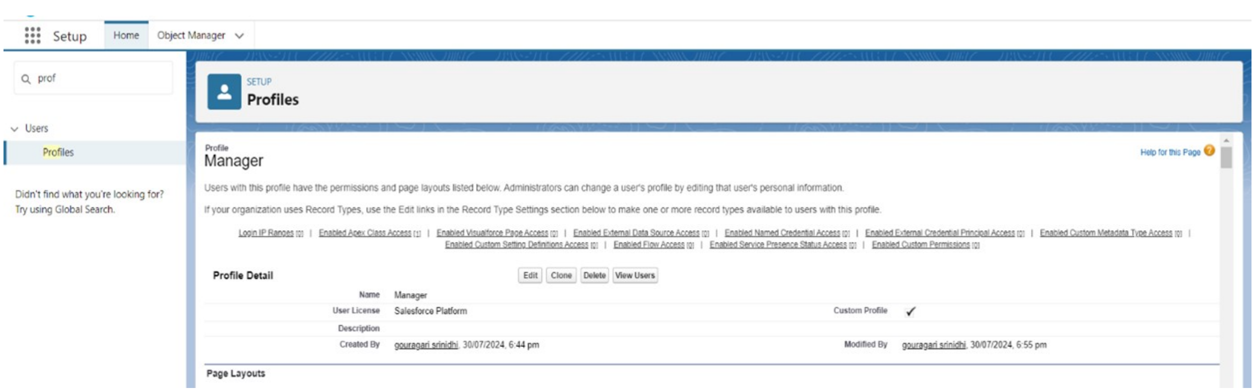






1. Manager

- 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."




Setup
Home
Object Manager
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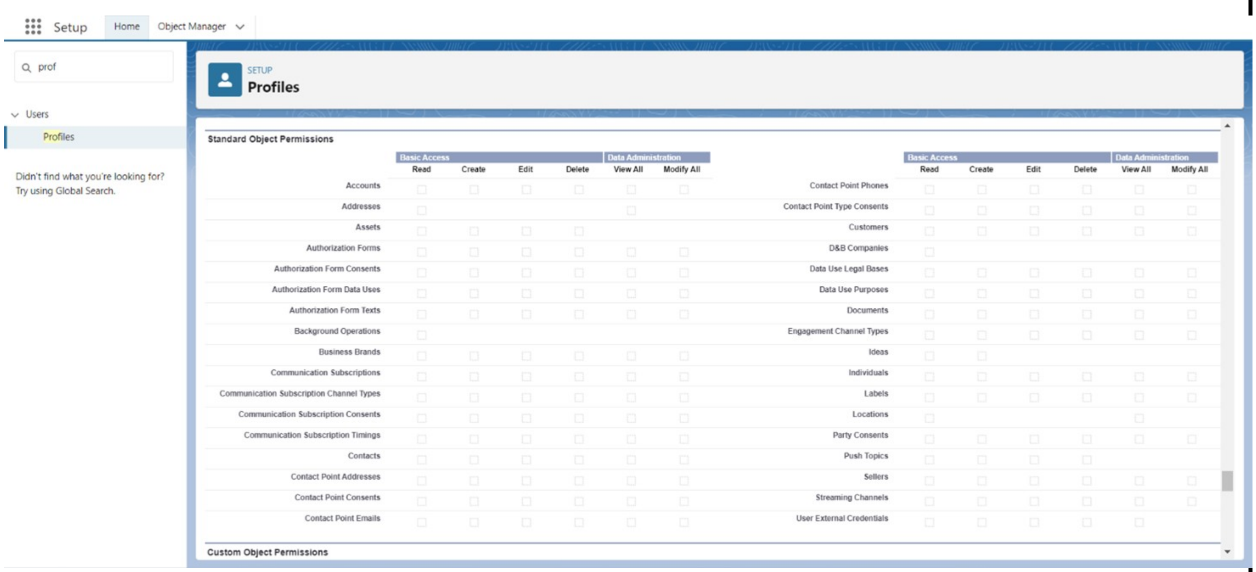
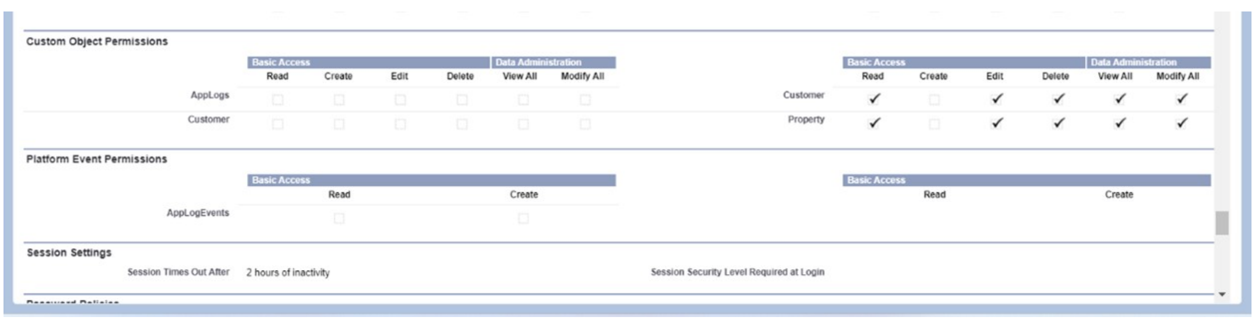
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Invoice [View]
Invoice Line [View]
Lead [View]
Location [View]
Location Group [View]
Location Group Assignment [View]
Object Milestone [View]
Waitlist Participant [View]
Waitlist Service Resource [View]
Waitlist Work Type [View]
Web Store Inventory Source [View]
Work Type [View]
Work Type Group [View]
Work Type Group Member [View]
Custom Field-Level Security
AppLog [View]
Customer [View]
Customer [View]
Property [View]
Custom App Settings
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Platform (standard__Platform)
Property Details (Property_Details)
User Access & Permissions Assistant (Profile2PermSet__Profiles_to_Permission_Sets)
WDC (standard__Work)
Connected App Access
User Access and Permissions Assistant
Service Provider Access
Tab Settings
Standard Tab Settings
Home Default On
Accounts Default On
All Sites Tab Hidden
Alternative Payment Methods Tab Hidden
Individuals Tab Hidden
Inventory Item Reservations Tab Hidden
Inventory Reservations Tab Hidden
Invoices Tab Hidden


Setup
Home
Object Manager
prof
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Standard Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Accounts
Addresses
Assets
Authorization Forms
Authorization Form Consents
Authorization Form Data Uses
Authorization Form Texts
Background Operations
Business Brands
Communication Subscriptions
Communication Subscription Channel Types
Communication Subscription Consents
Communication Subscription Timings
Contacts
Contact Point Addresses
Contact Point Consents
Contact Point Emails
Contact Point Phones
Contact Point Type Consents
Customers
D&B Companies
Data Use Legal Bases
Data Use Purposes
Documents
Engagement Channel Types
Ideas
Individuals
Labels
Locations
Party Consents
Push Topics
Sellers
Streaming Channels
User External Credentials
Custom Object Permissions

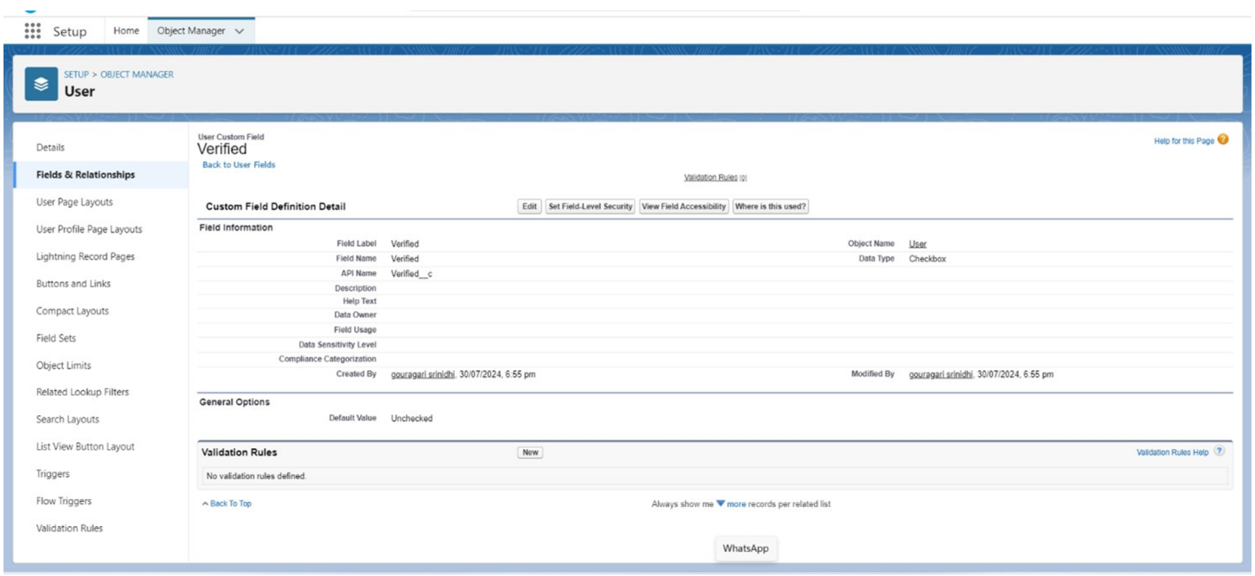

Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
AppLogs
Customer
Customer
Property
Platform Event Permissions
Basic Access
Read
Create
AppLogEvents
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login

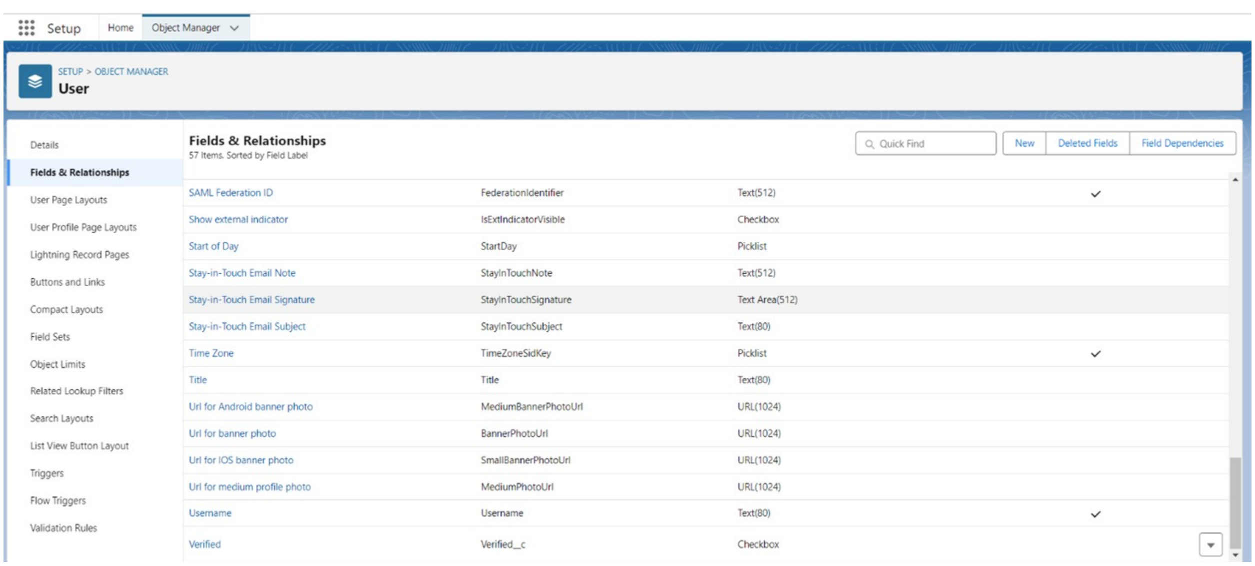
Task 7: Create a Check Box field on user

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."



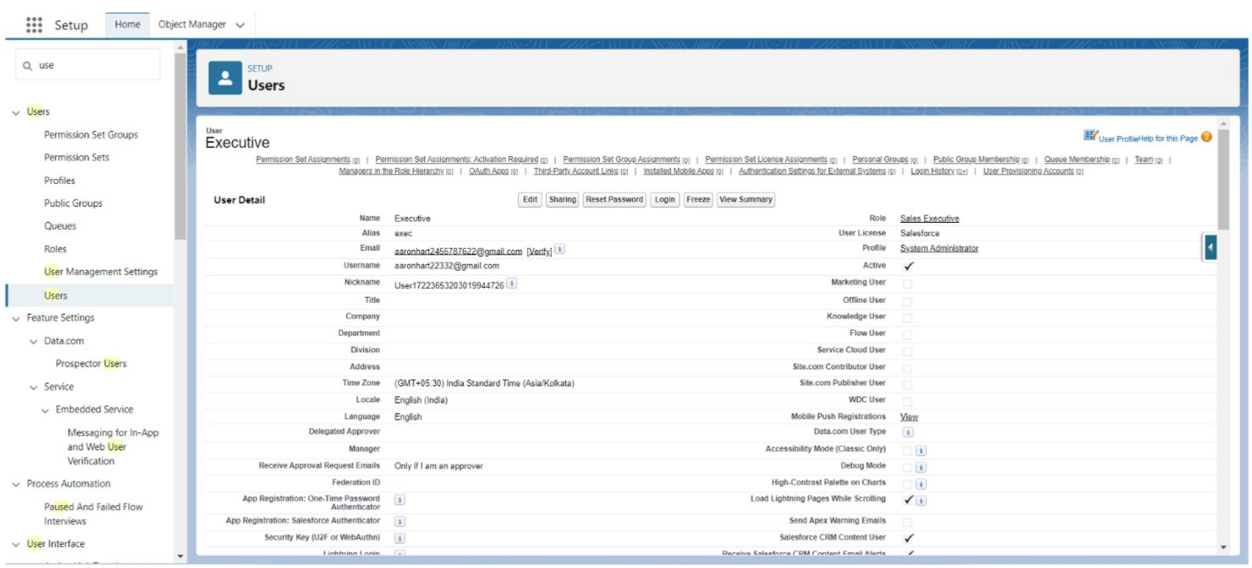


Task 8: Create Users

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

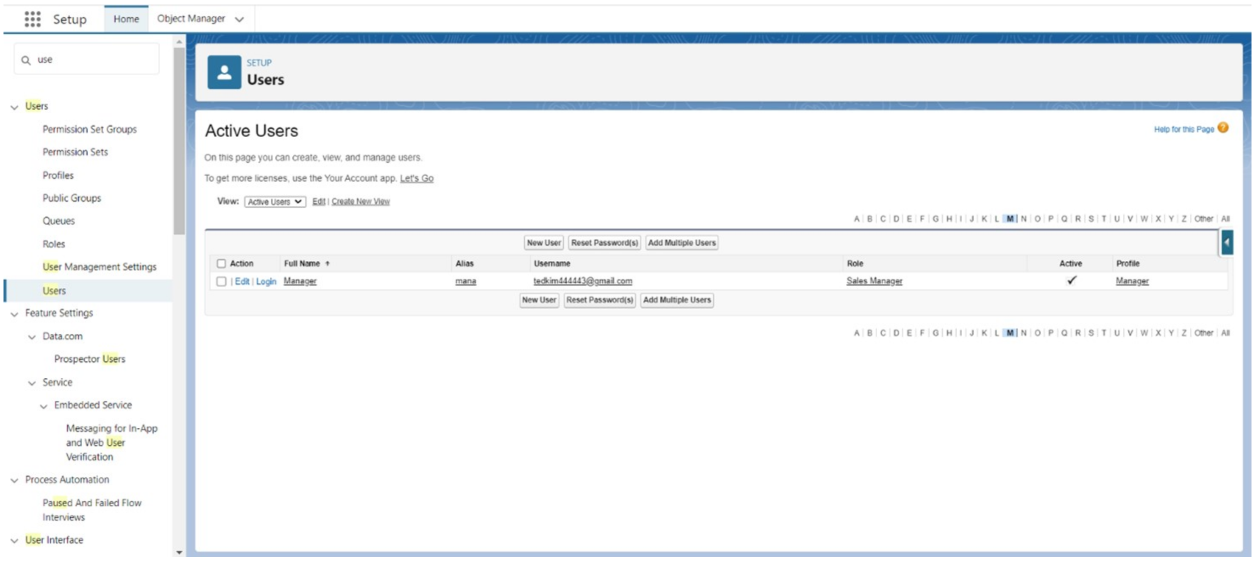
1. User 1

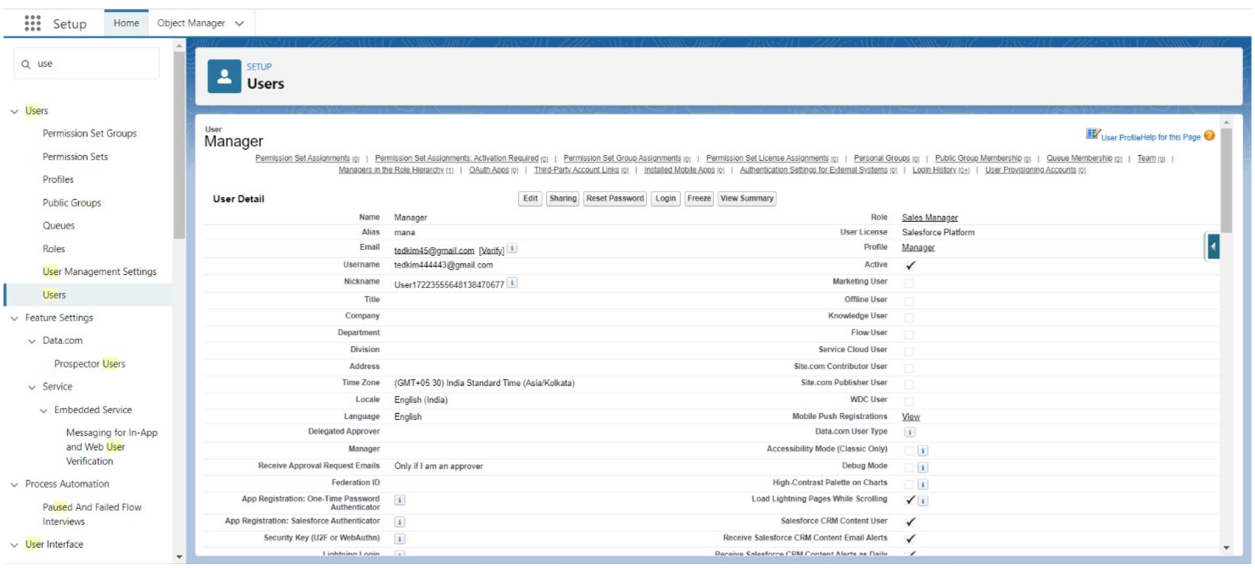
- In Setup, navigate to Administration > Users > New User, fill in the Last Name as "Executive," set the Role to "Sales Executive," select the License as "Salesforce," choose the Profile as "System Administrator," and save.



- User 2

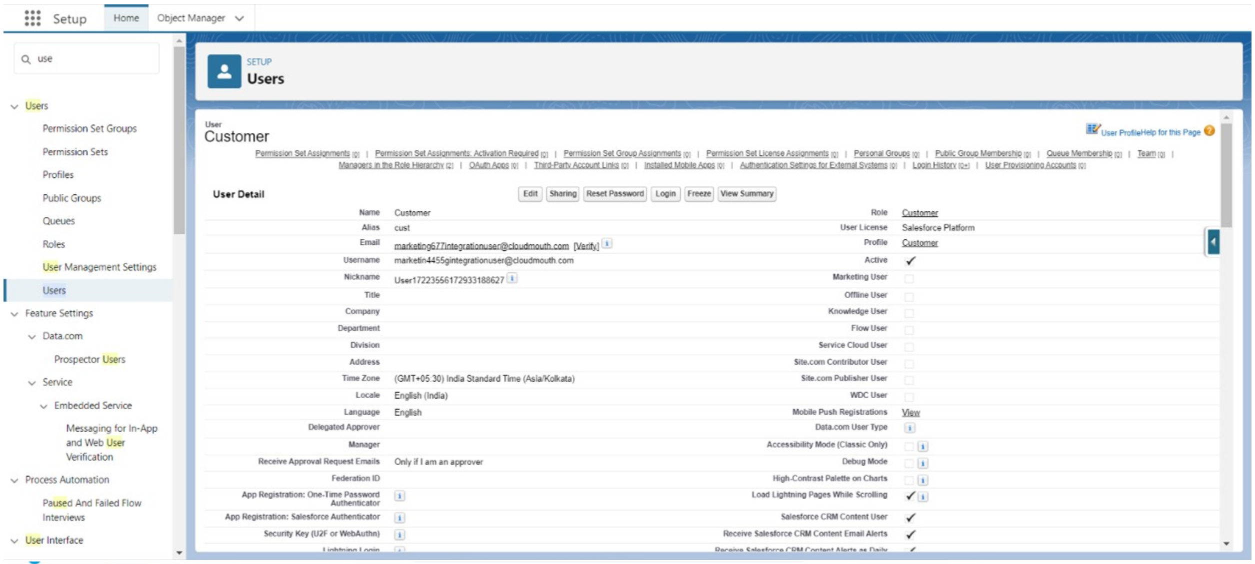
- In Setup, navigate to Administration > Users > New User, fill in the Last Name as "Manager," set the Role to "Sales Manager," select the License as "Salesforce Platform," choose the Profile as "Manager," and save.

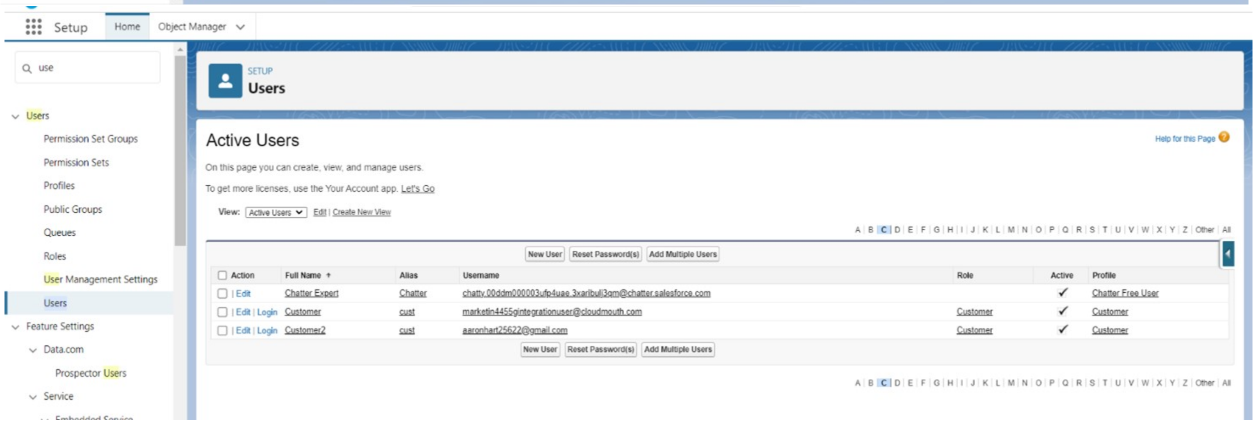


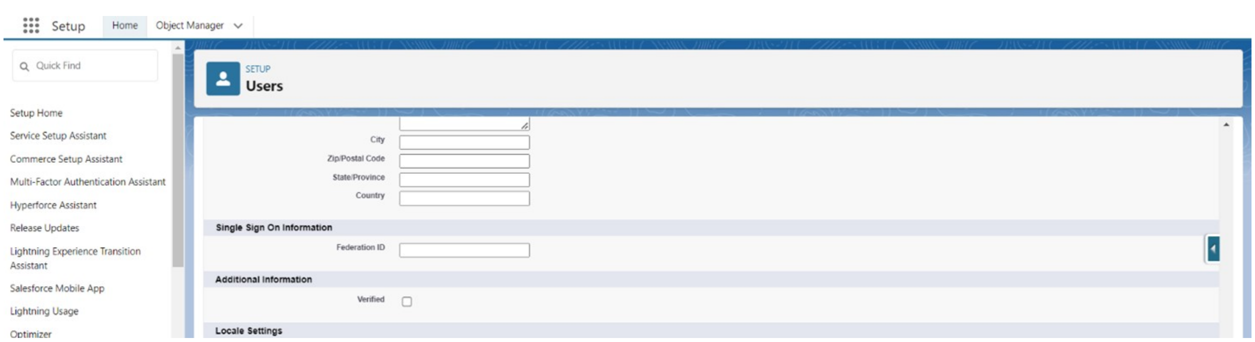


- User 3

- 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.

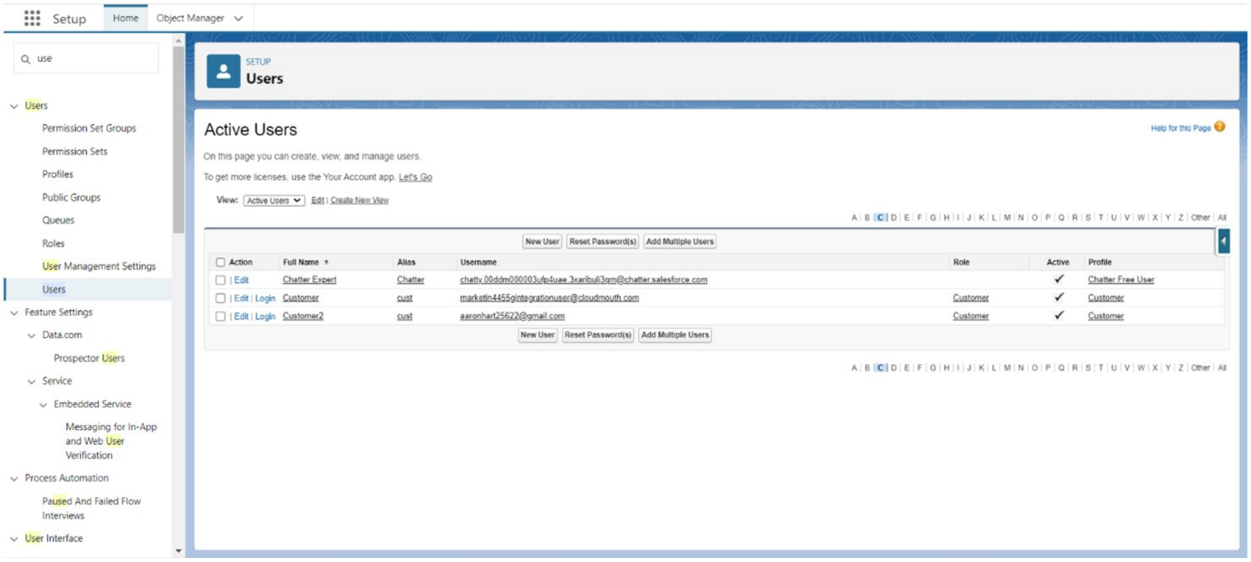


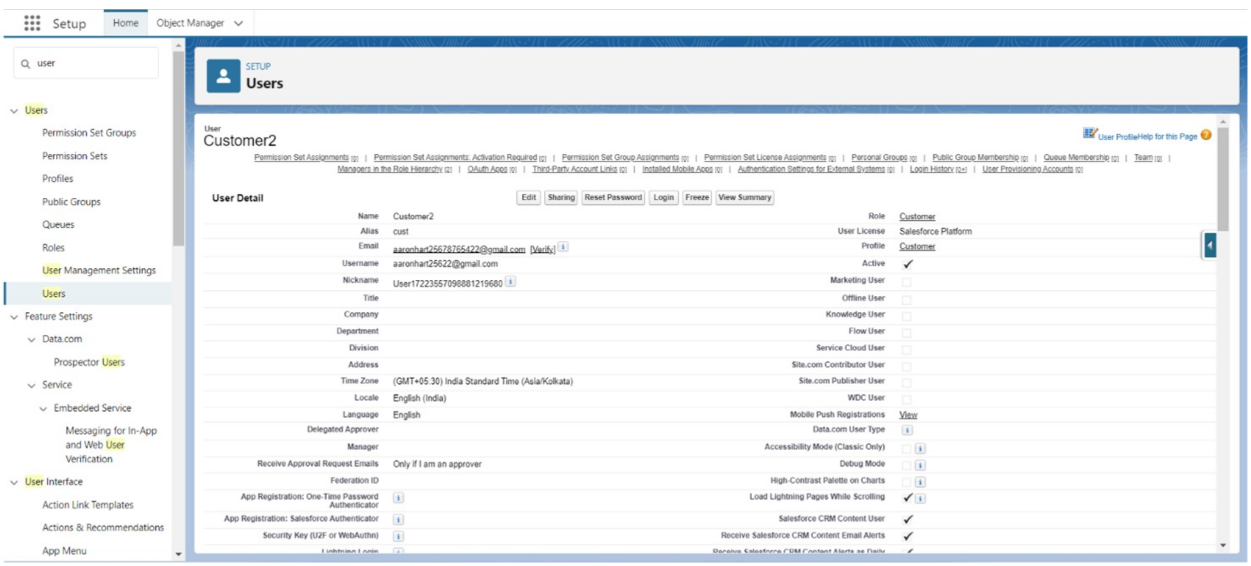


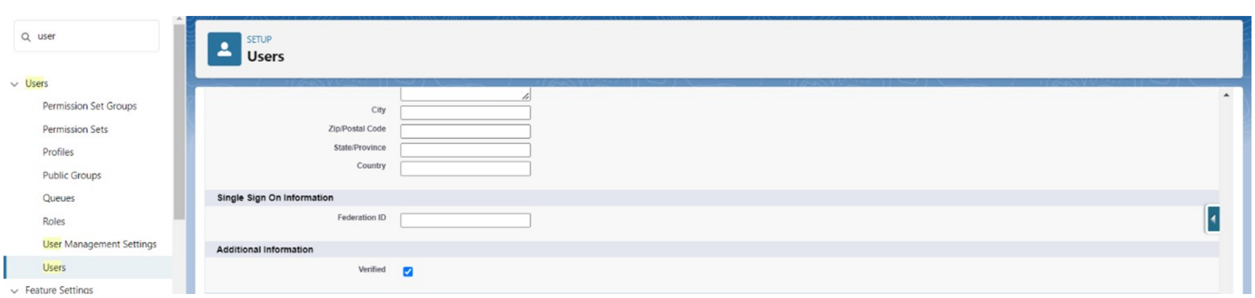


-User 4

- 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
SETUP
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
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
Chatter Expert
Customer
Customer2
Chatter Free User
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
Process Automation
Paused And Failed Flow Interviews
User Interface


Setup
Home
Object Manager
SETUP
Users
User
Customer2
User Detail
Edit
Sharing
Reset Password
Login
Freeze
View Summary
Name
Customer2
Alias
cust
Email
Username
aaronhart25622@gmail.com
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
Receive Approval Request Emails
Only if I am an approver
Role
Customer
User License
Salesforce Platform
Profile
Customer
Active

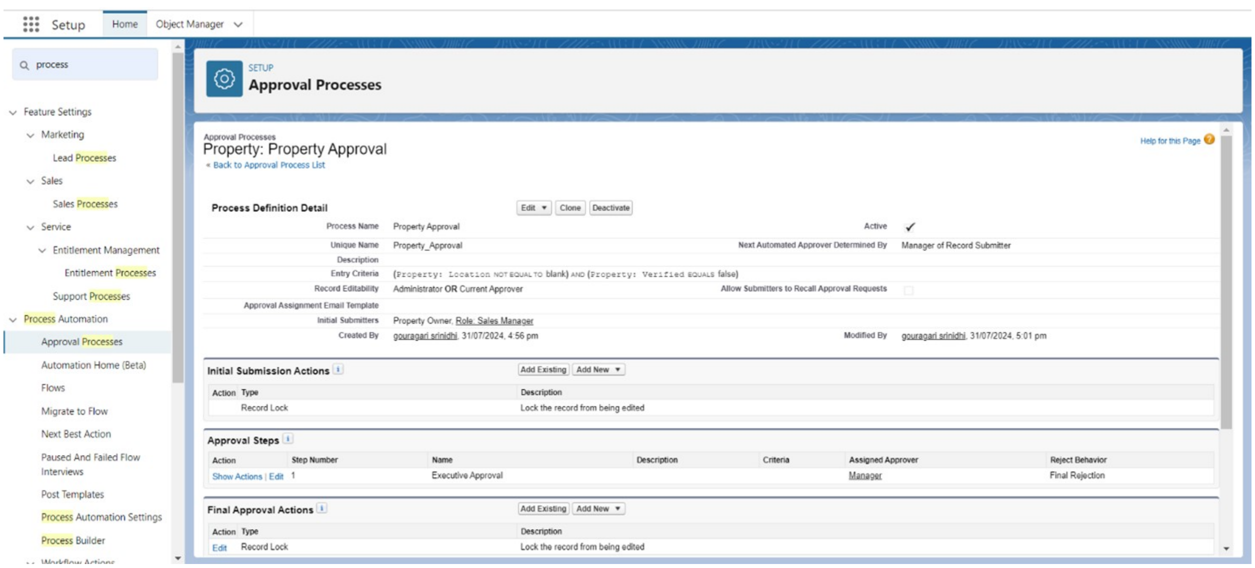

SETUP
Users
City
Zip/Postal Code
State/Province
Country
Single Sign On Information
Federation ID
Additional Information
Verified

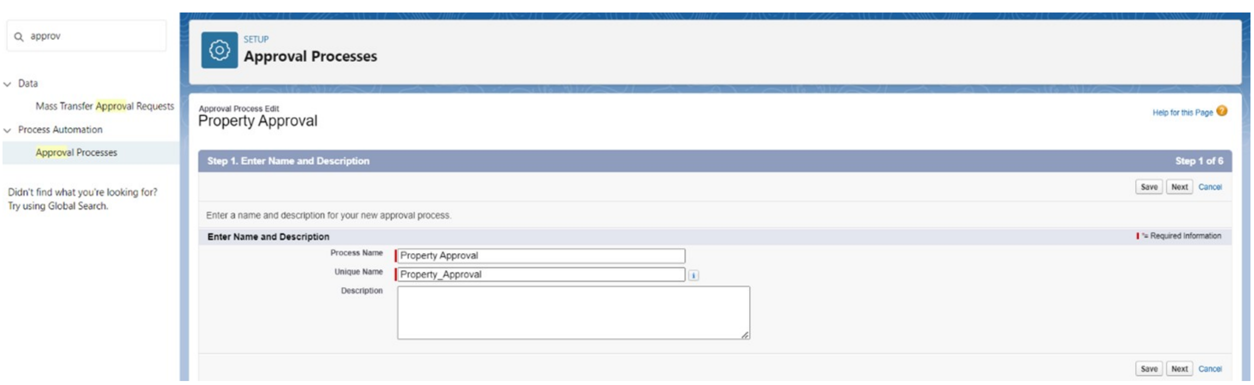
Task 9: Create an Approval Process for Property Object

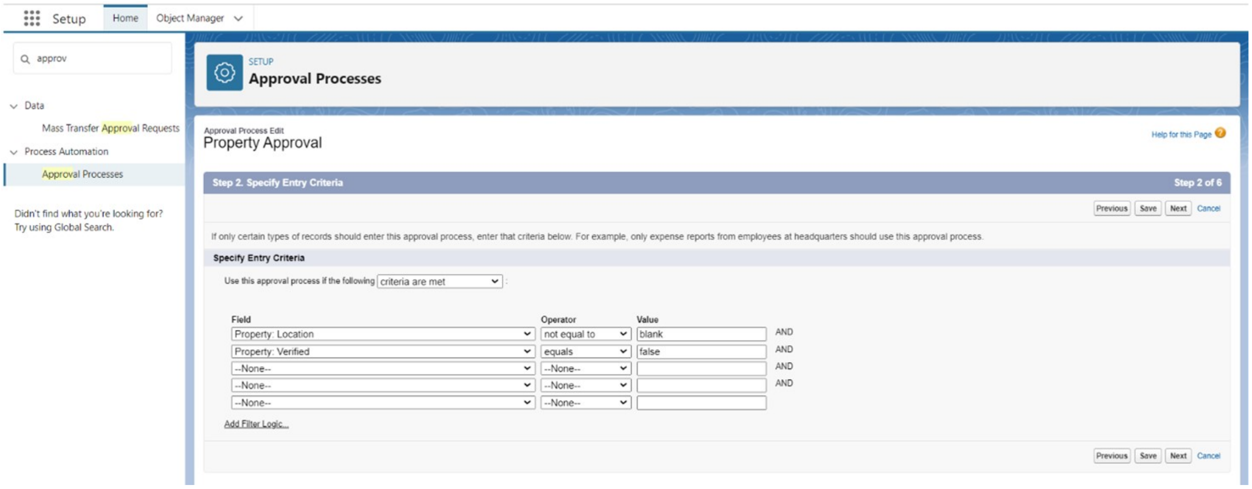
An Approval process to approve or reject the records as according

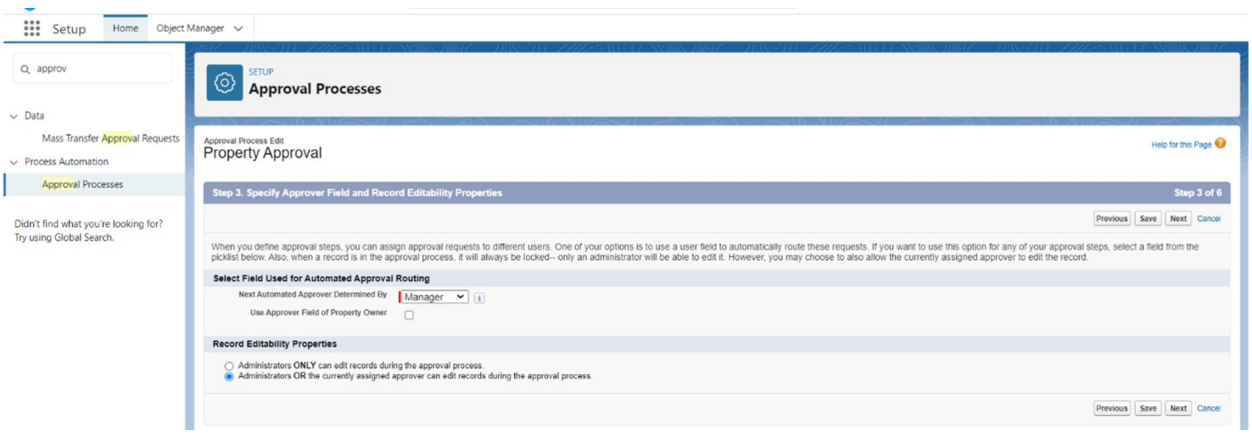
- Activity 1

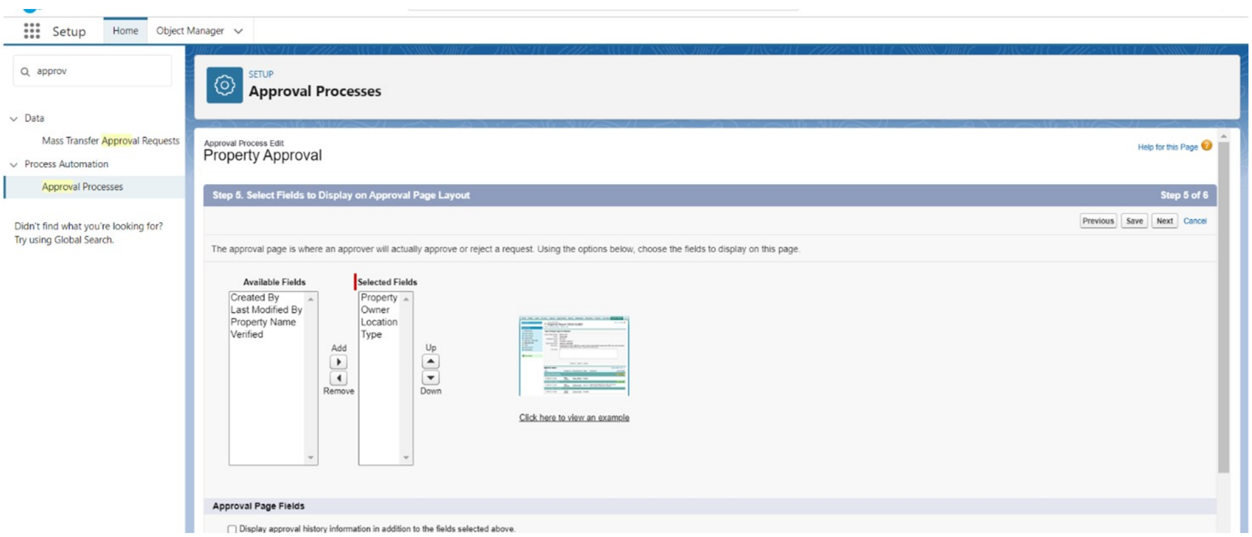
- In Setup, navigate to Process Automation > Approval Process, create a "Property Approval"process with criteria "Location is not equal to blank" and "Verified equals false," set the next automated approver to "Manager," enable record editability for administrators or current approvers, display Property, 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.

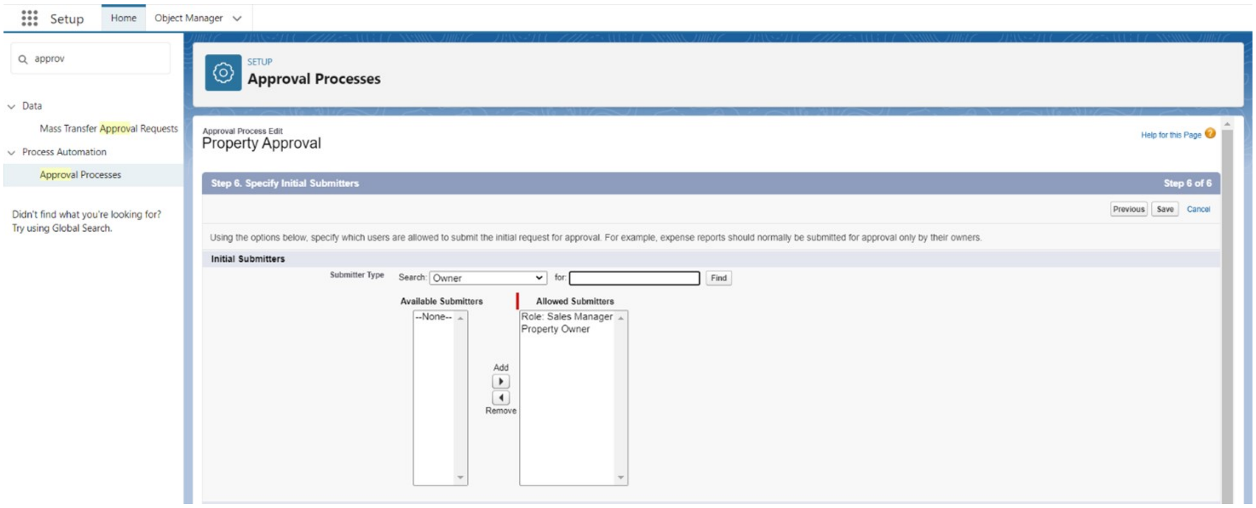


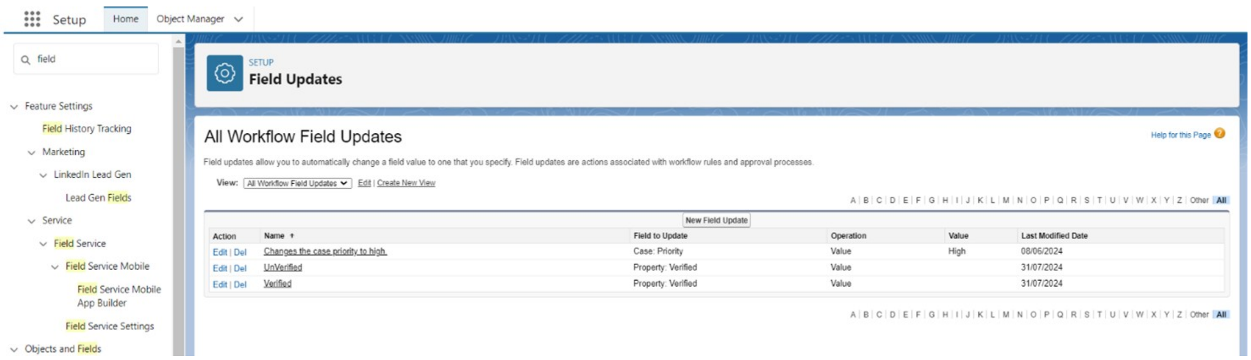



Setup
Home
Object Manager
approv
Data
Mass Transfer Approval Requests
Process Automation
Approval Processes
Didn't find what you're looking for?
Try using Global Search.
SETUP
Approval Processes
Approval Process Edit
Property Approval
Help for this Page
Step 2. Specify Entry Criteria
Step 2 of 6
Previous
Save
Next
Cancel
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
Property: Location
not equal to
blank
AND
Property: Verified
equals
false
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Add Filter Logic...


Setup
Home
Object Manager
approv
Data
Mass Transfer Approval Requests
Process Automation
Approval Processes
Didn't find what you're looking for?
Try using Global Search.
SETUP
Approval Processes
Approval Process Edit
Property Approval
Help for this Page
Step 3. Specify Approver Field and Record Editability Properties
Step 3 of 6
Previous
Save
Next
Cancel
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.


Setup
Home
Object Manager
approv
Data
Mass Transfer Approval Requests
Process Automation
Approval Processes
Didn't find what you're looking for?
Try using Global Search.
SETUP
Approval Processes
Approval Process Edit
Property Approval
Help for this Page
Step 5. Select Fields to Display on Approval Page Layout
Step 5 of 6
Previous
Save
Next
Cancel
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
Add
Remove
Selected Fields
Property
Owner
Location
Type
Up
Down
Click here to view an example
Approval Page Fields
Display approval history information in addition to the fields selected above.



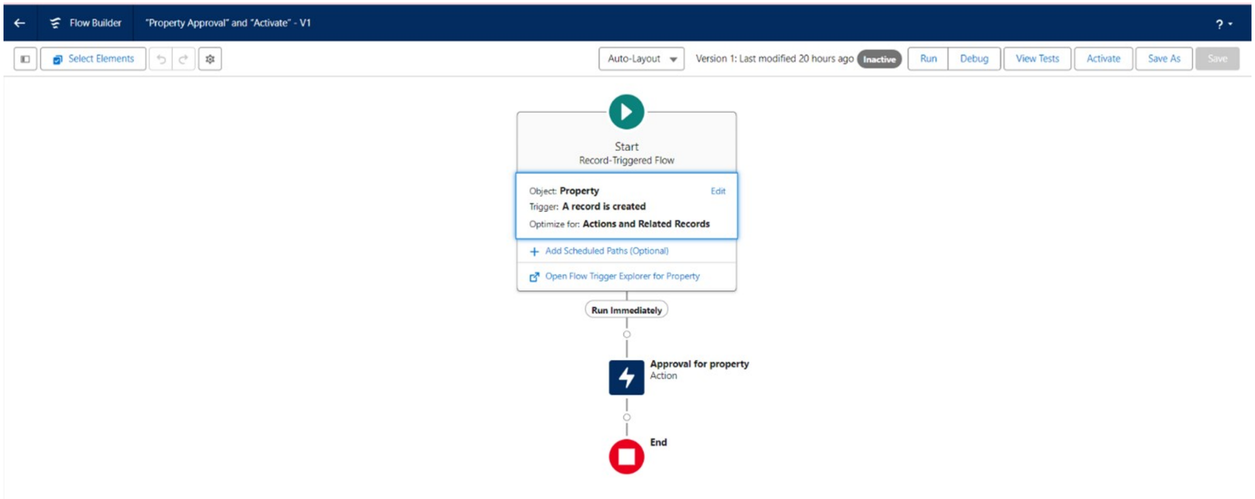


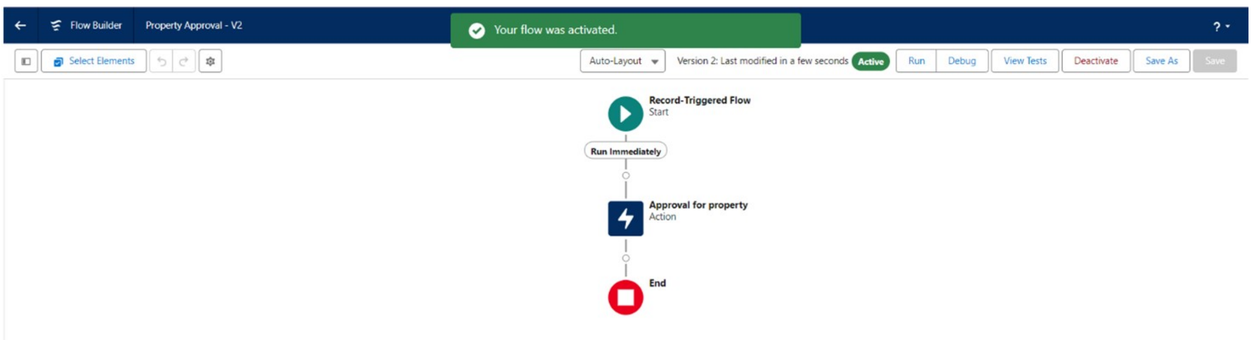
Task 10: Create a Record trigger flow to submit the Approval Process Automatically.

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.



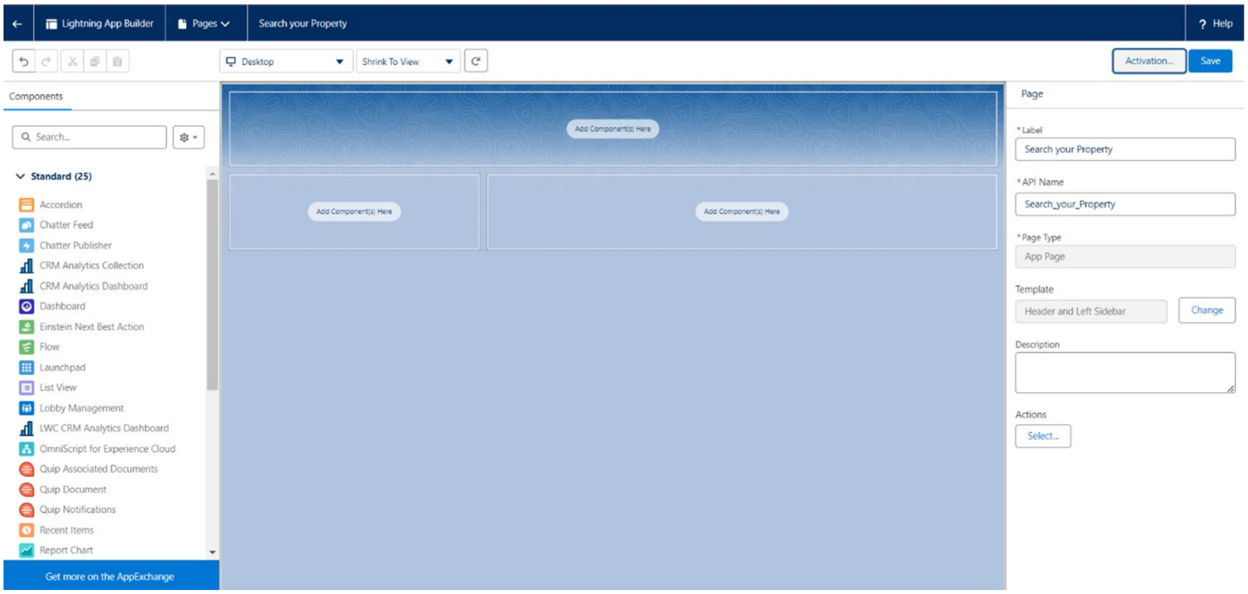


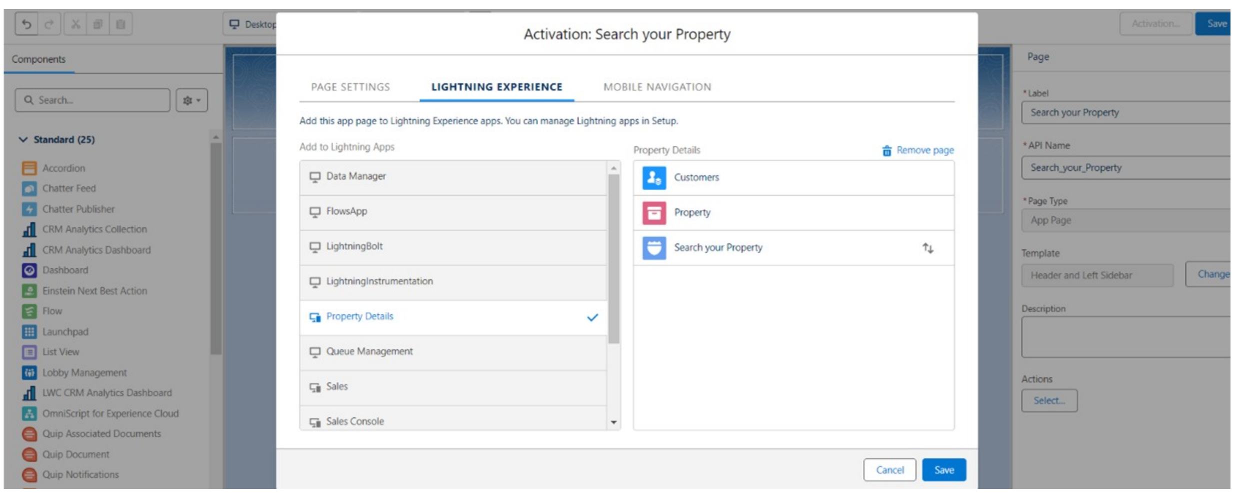
Task 11: Create an App Page

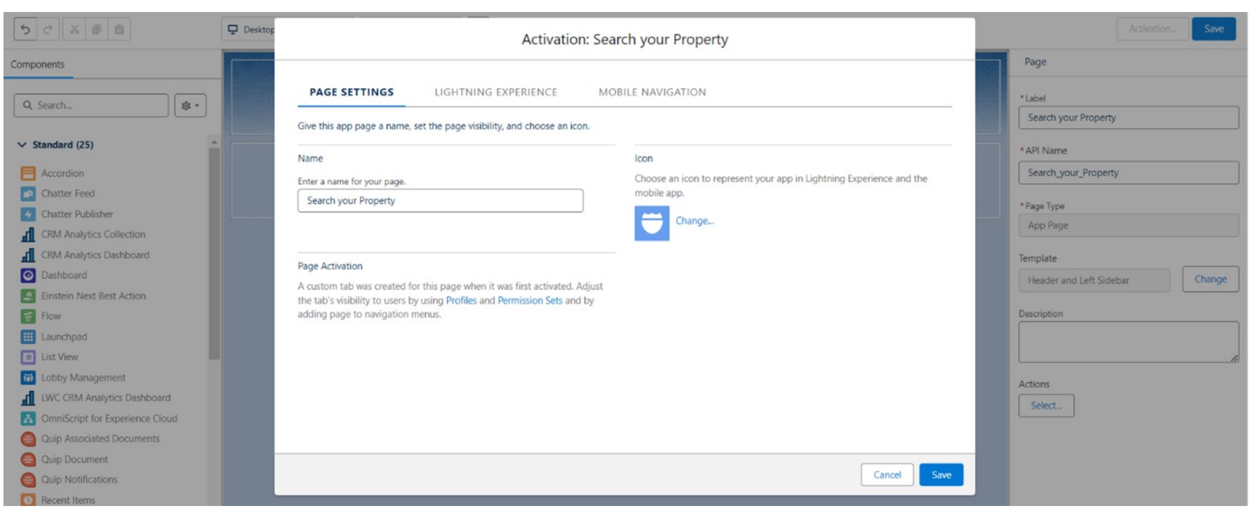
Create an App Page on the Property details Object named as “Search Your Property”

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.


Lightning App Builder
Pages
Search your Property
Help
Desktop
Shrink To View
Activation...
Save
Components
Search...
Standard (25)
Accordion
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Einstein Next Best Action
Flow
Launchpad
List View
Lobby Management
LWC CRM Analytics Dashboard
OmniScript for Experience Cloud
Quip Associated Documents
Quip Document
Quip Notifications
Recent Items
Report Chart
Get more on the AppExchange
Add Component(s) Here
Page
* Label
Search your Property
* API Name
Search_your_Property
* Page Type
App Page
Template
Header and Left Sidebar
Change
Description
Actions
Select...


Activation: Search your Property
PAGE SETTINGS
LIGHTNING EXPERIENCE
MOBILE NAVIGATION
Add this app page to Lightning Experience apps. You can manage Lightning apps in Setup.
Add to Lightning Apps
Data Manager
FlowsApp
LightningBolt
LightningInstrumentation
Property Details
Queue Management
Sales
Sales Console
Property Details
Remove page
Customers
Property
Search your Property
Cancel
Save

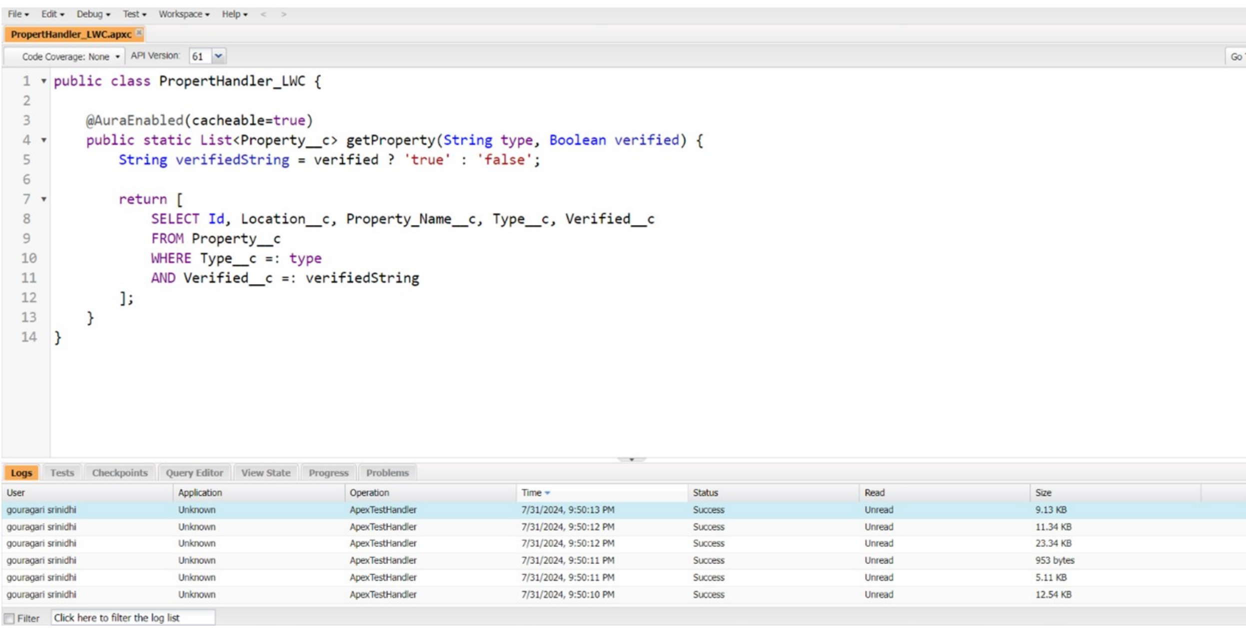

Activation: Search your Property
PAGE SETTINGS
LIGHTNING EXPERIENCE
MOBILE NAVIGATION
Give this app page a name, set the page visibility, and choose an icon.
Name
Enter a name for your page.
Search your Property
Icon
Choose an icon to represent your app in Lightning Experience and the mobile app.
Change...
Page Activation
A custom tab was created for this page when it was first activated. Adjust the tab's visibility to users by using Profiles and Permission Sets and by adding page to navigation menus.
Cancel
Save

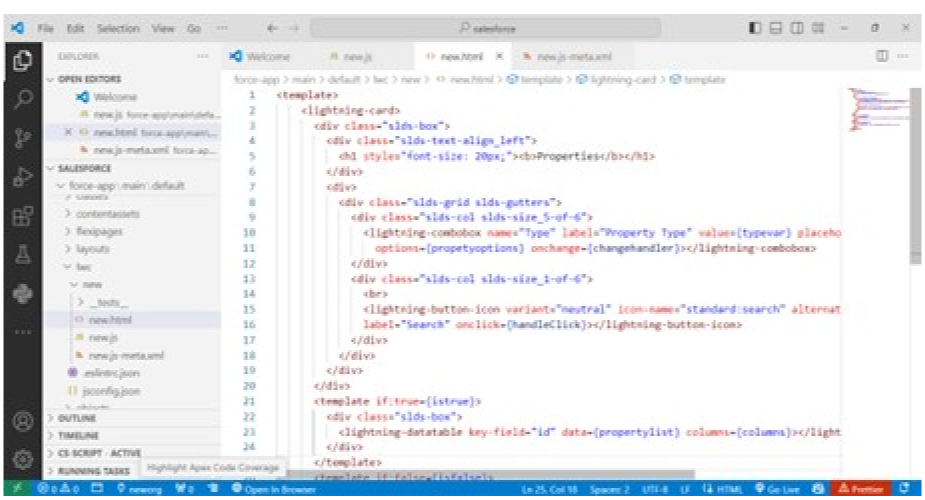
Task 12: Create a LWC Component

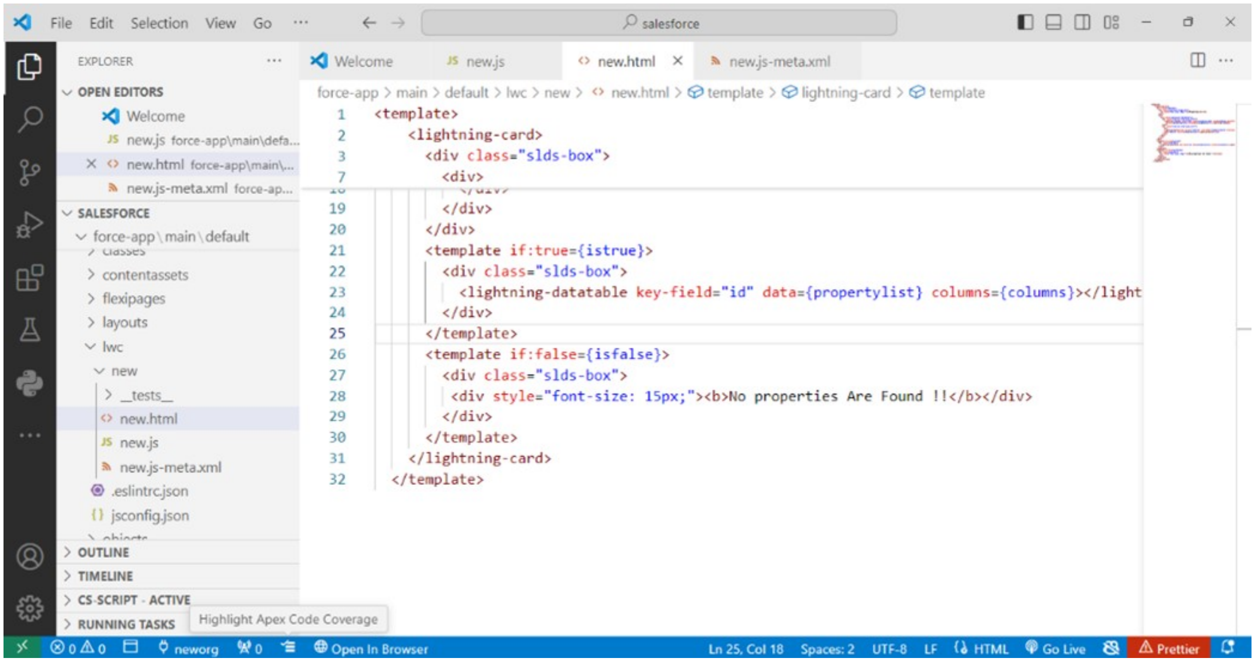
Create an LWC Component for the customers so that only verified customers can access the verified properties and non-Verified customers can access non verified properties, and deploy it on “Search your Property Page”

Activity 1

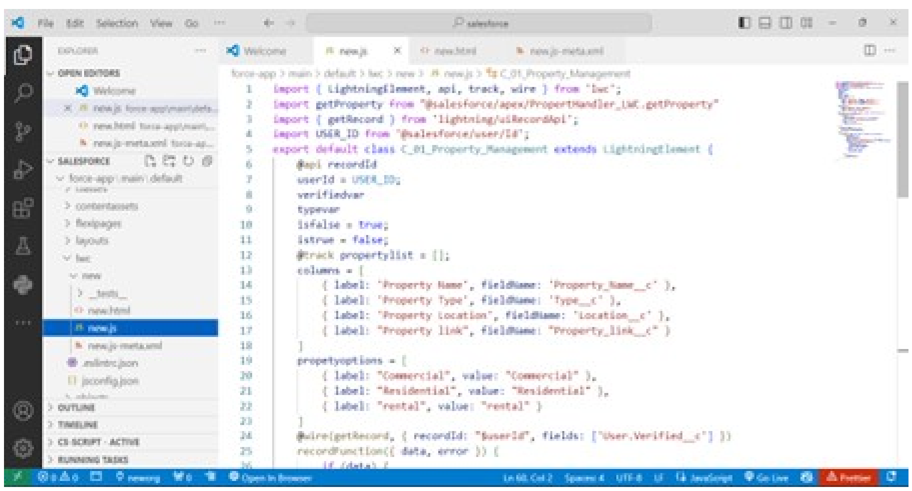
- Create an Apex class named "PropertyHandler_LWC" and make it Aura enabled, then in VSCode, authorize your org, create a Lightning Web Component, write the provided code in the HTML, JS, and metafile, and deploy the component to the org.



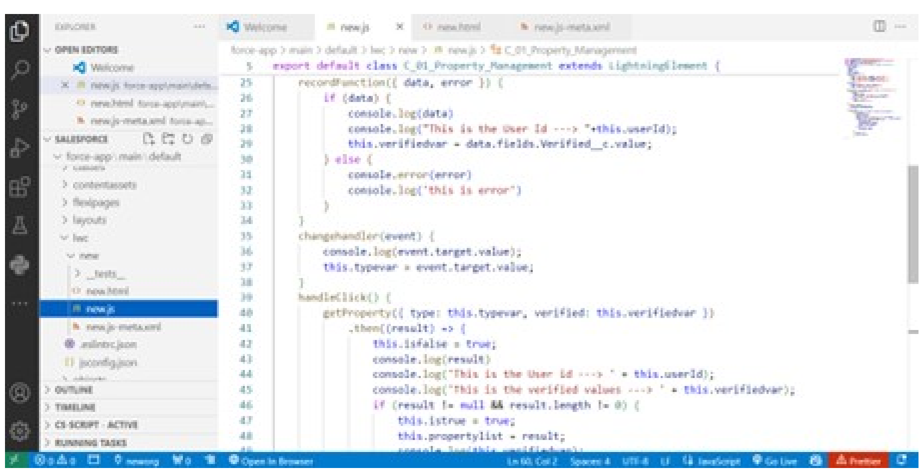




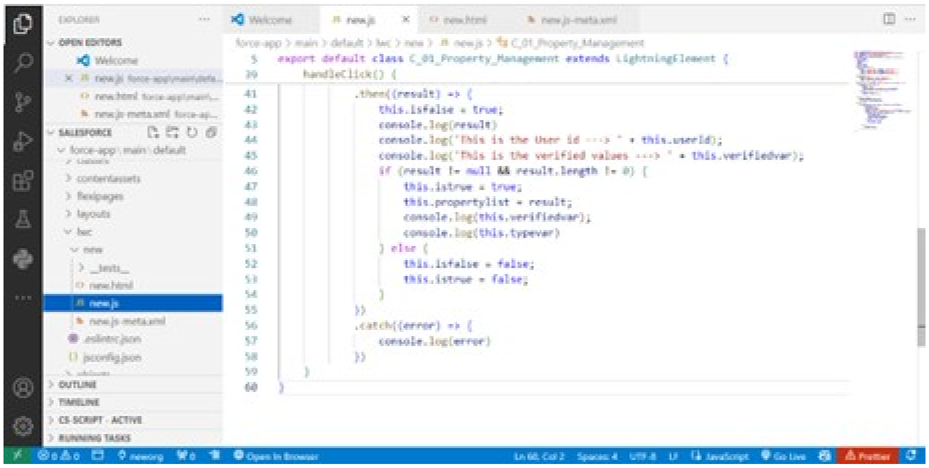
File Edit Selection View Go
salesforce
EXPLORER
OPEN EDITORS
Welcome
new.js force-app\main\defa...
new.html force-app\main\...
new.js-meta.xml force-ap...
SALESFORCE
force-app\main\default
contentassets
flexipages
layouts
lwc
new
__tests__
new.html
new.js
new.js-meta.xml
.eslintrc.json
jsconfig.json
OUTLINE
TIMELINE
CS-SCRIPT - ACTIVE
RUNNING TASKS
Highlight Apex Code Coverage
Welcome
new.js
new.html
new.js-meta.xml
force-app > main > default > lwc > new > new.html > template > lightning-card > template
<template>
<lightning-card>
<div class="slds-box">
<div>
</div>
</div>
<template if:true={istrue}>
<div class="slds-box">
<lightning-datatable key-field="id" data={propertylist} columns={columns}></light
</div>
</template>
<template if:false={isfalse}>
<div class="slds-box">
<div style="font-size: 15px;">No properties Are Found !!</div>
</div>
</template>
</lightning-card>
</template>
neworg
Open In Browser
Ln 25, Col 18 Spaces: 2 UTF-8 LF HTML Go Live Prettier



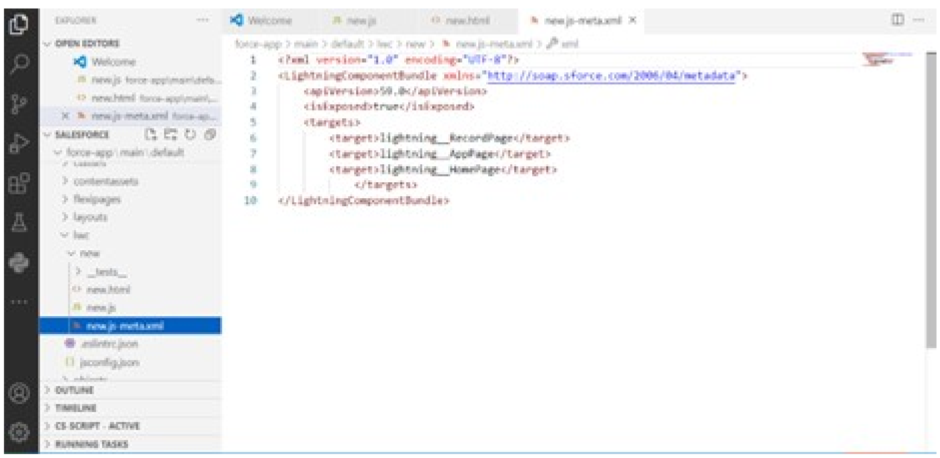
import { LightningElement, api, track, wire } from 'lwc';
import getProperty from "@salesforce/apex/PropertHandler_LWC.getProperty"
import { getRecord } from 'lightning/uiRecordApi';
import USER_ID from "@salesforce/user/Id";
export default class C_01_Property_Management extends LightningElement {
@api 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 }) {



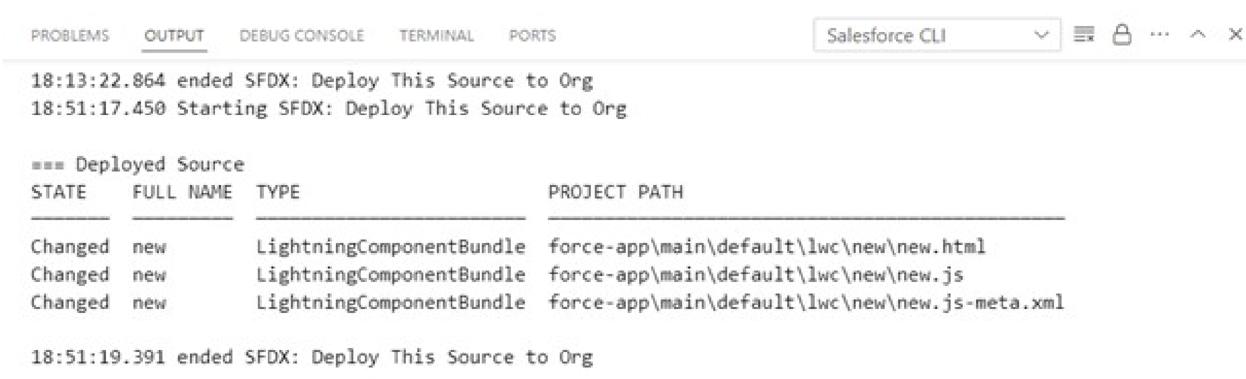
export default class C_01_Property_Management extends LightningElement {
recordFunction({ data, error }) {
if (data) {
console.log(data)
console.log("This is the User Id ---> "+this.userId);
this.verifiedvar = data.fields.Verified__c.value;
} else {
console.error(error)
console.log('this is error')
}
}
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 values ---> " + this.verifiedvar);
if (result != null && result.length != 0) {
this.istrue = true;
this.propertylist = result;



new.js
export default class C_01_Property_Management extends LightningElement {
handleClick() {
.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)
})
}
}



new.js-meta.xml
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
<apiVersion>58.0</apiVersion>
<isExposed>true</isExposed>
<targets>
<target>lightning__RecordPage</target>
<target>lightning__AppPage</target>
<target>lightning__HomePage</target>
</targets>
</LightningComponentBundle>



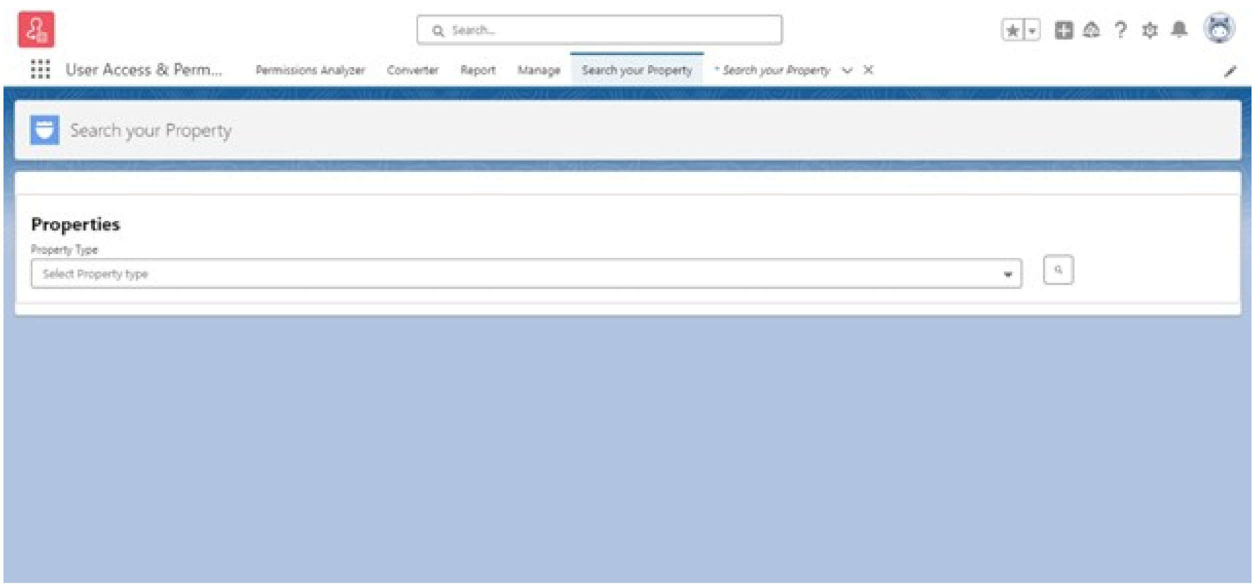
PROBLEMS
OUTPUT
DEBUG CONSOLE
TERMINAL
PORTS
Salesforce CLI
18:13:22.864 ended SFDX: Deploy This Source to Org
18:51:17.450 Starting SFDX: Deploy This Source to Org
=== Deployed Source
STATE FULL NAME TYPE PROJECT PATH
Changed new LightningComponentBundle force-app\main\default\lwc\new\new.html
Changed 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

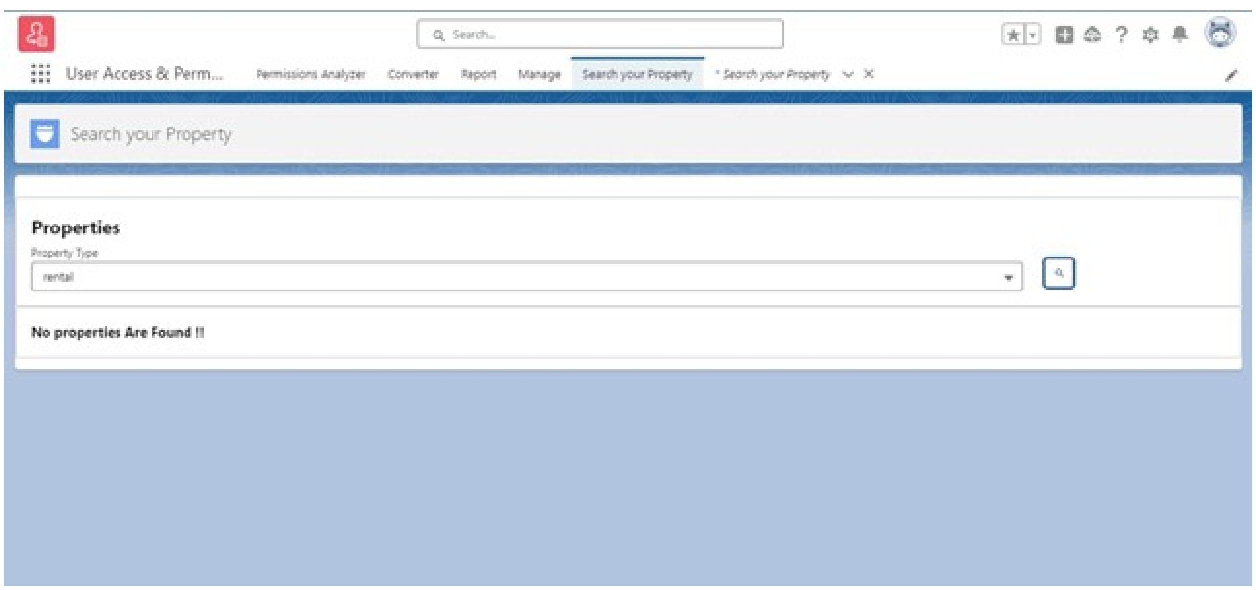
Task 13: Drag this Component to your App Page

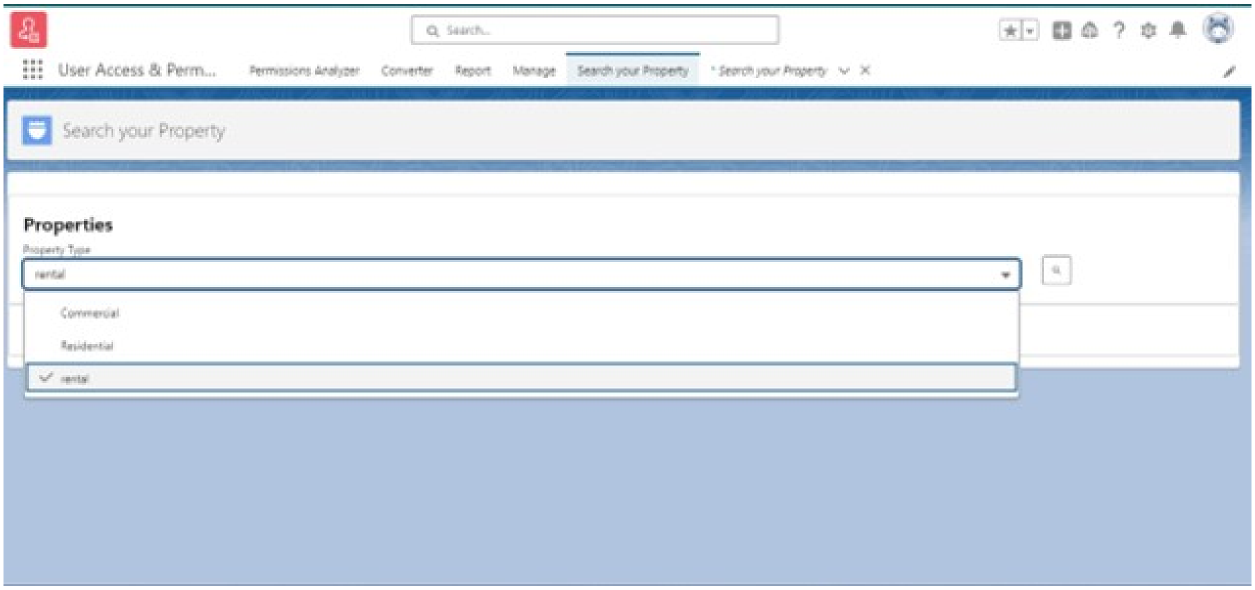
Adding the Component to your Page

- 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.





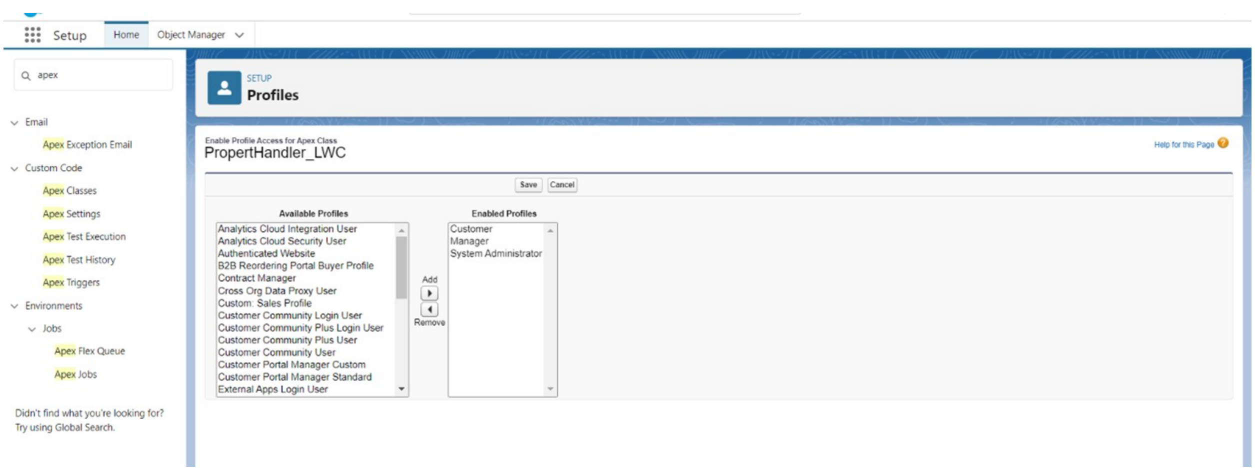


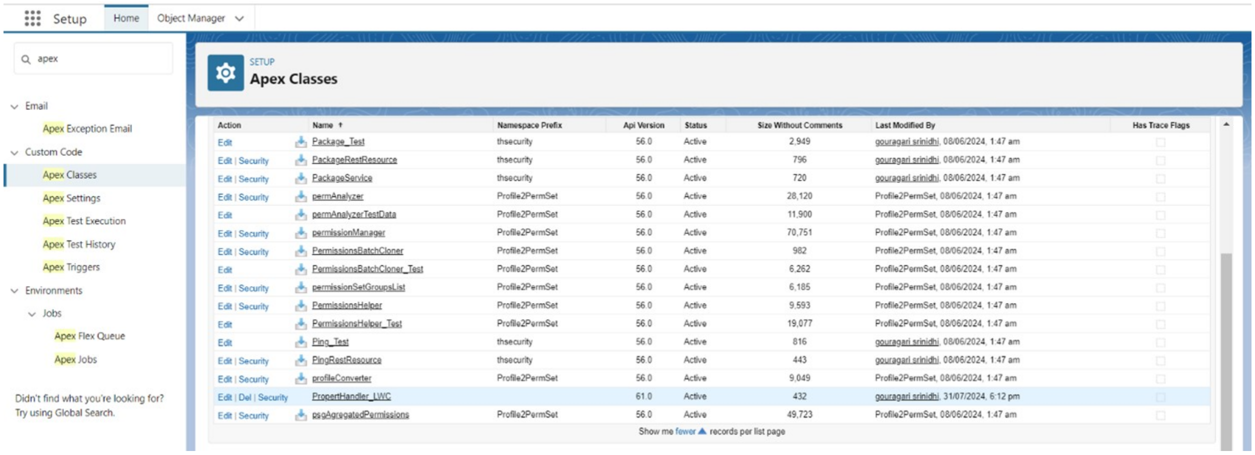
Task 14: Give Access of Apex Classes to Profiles

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.





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	gouragari srinidhi, 08/06/2024, 1:47 am	
Edit | Security	PackageRestResource	thsecurity	56.0	Active	796	gouragari srinidhi, 08/06/2024, 1:47 am	
Edit | Security	PackageService	thsecurity	56.0	Active	720	gouragari srinidhi, 08/06/2024, 1:47 am	
Edit | Security	permAnalyzer	Profile2PermSet	56.0	Active	28,120	Profile2PermSet, 08/06/2024, 1:47 am	
Edit	permAnalyzerTestData	Profile2PermSet	56.0	Active	11,900	Profile2PermSet, 08/06/2024, 1:47 am	
Edit | Security	permissionManager	Profile2PermSet	56.0	Active	70,751	Profile2PermSet, 08/06/2024, 1:47 am	
Edit | Security	PermissionsBatchCloner	Profile2PermSet	56.0	Active	982	Profile2PermSet, 08/06/2024, 1:47 am	
Edit	PermissionsBatchCloner_Test	Profile2PermSet	56.0	Active	6,262	Profile2PermSet, 08/06/2024, 1:47 am	
Edit | Security	permissionSetGroupsList	Profile2PermSet	56.0	Active	6,185	Profile2PermSet, 08/06/2024, 1:47 am	
Edit | Security	PermissionsHelper	Profile2PermSet	56.0	Active	9,593	Profile2PermSet, 08/06/2024, 1:47 am	
Edit	PermissionsHelper_Test	Profile2PermSet	56.0	Active	19,077	Profile2PermSet, 08/06/2024, 1:47 am	
Edit	Ping_Test	thsecurity	56.0	Active	816	gouragari srinidhi, 08/06/2024, 1:47 am	
Edit | Security	PingRestResource	thsecurity	56.0	Active	443	gouragari srinidhi, 08/06/2024, 1:47 am	
Edit | Security	profileConverter	Profile2PermSet	56.0	Active	9,049	Profile2PermSet, 08/06/2024, 1:47 am	
Edit | Del | Security	PropertHandler_LWC		61.0	Active	432	gouragari srinidhi, 31/07/2024, 6:12 pm	
Edit | Security	psgAggregatedPermissions	Profile2PermSet	56.0	Active	49,723	Profile2PermSet, 08/06/2024, 1:47 am	

Show me fewer ▲ records per list page

THANK YOU!!