Project Title: A CRM Application to Handle Clients and Their Property-Related Requirements

1.project overview

This project focuses on developing a Salesforce-based CRM application tailored to manage client interactions and their property-related needs. The primary objective is to streamline property management processes, enhance client relationship management, and optimize sales and support operations. By leveraging Salesforce's advanced capabilities, we aim to improve operational efficiency, provide a seamless user experience, and ensure accurate data management. This project aligns with the long-term goals of increasing customer satisfaction, improving service delivery, and enabling data-driven decision-making for property management businesses.

2. Objectives

Business Goals:

- Streamline the processes for managing clients and their property-related needs.
- Enhance client relationship management by providing detailed insights into client interactions and property data.
- Improve task tracking and property lifecycle management efficiency.
- Facilitate seamless communication between sales teams, clients, and other stakeholders.
- Increase overall operational transparency and efficiency.

Specific Outcomes:

- Develop a centralized database for managing client information, property details, and service requests.
- Create custom Salesforce workflows to automate property-related tasks.
- Implement dashboards and reports for real-time analytics and tracking.
- Enable mobile access for on-the-go CRM functionalities.

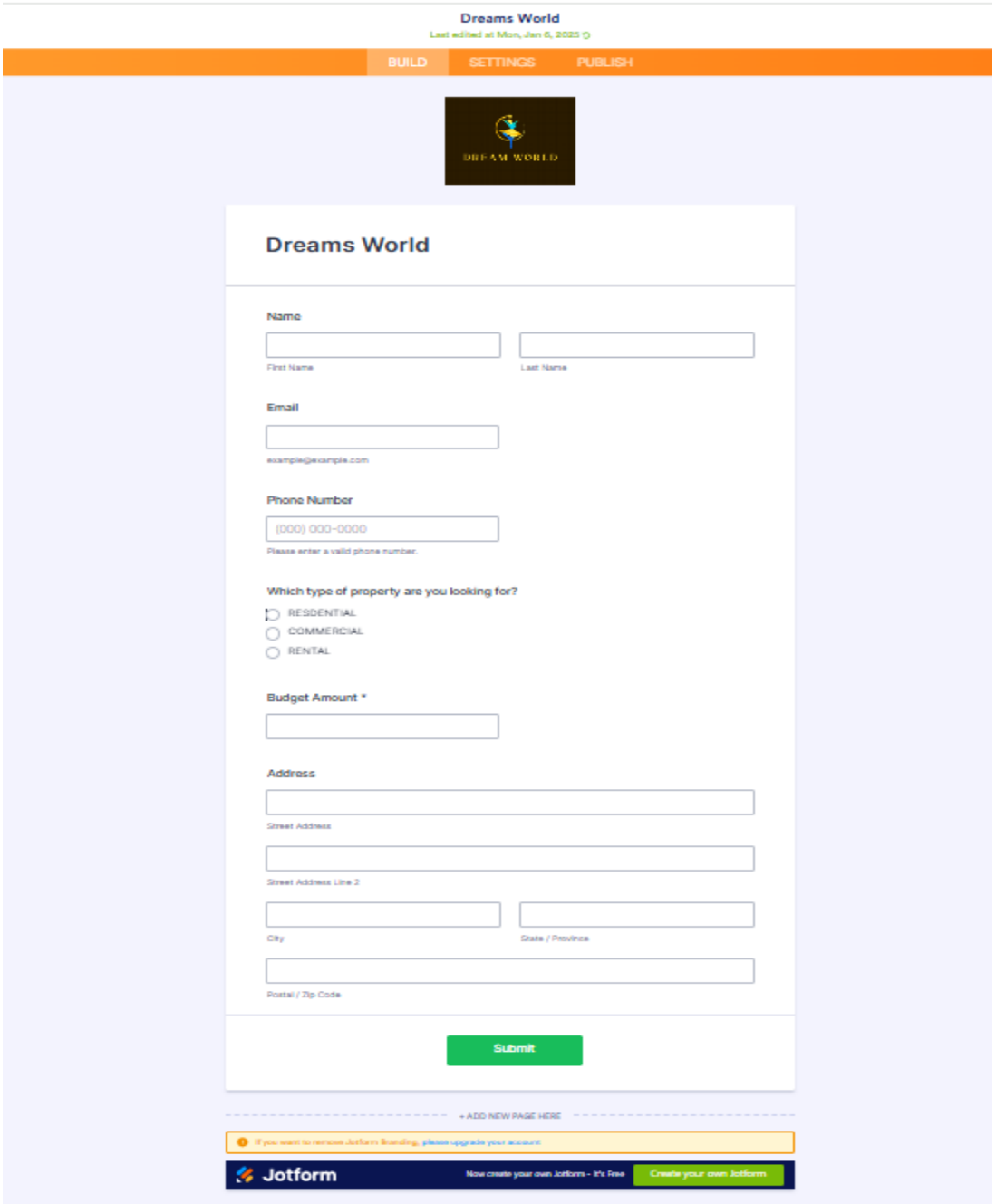
3. Salesforce Key Features and Concepts Utilized

- **Sales Cloud:** To manage leads, opportunities, and client pipelines.
- **Custom Objects:** For managing property details, service requests, and client-specific

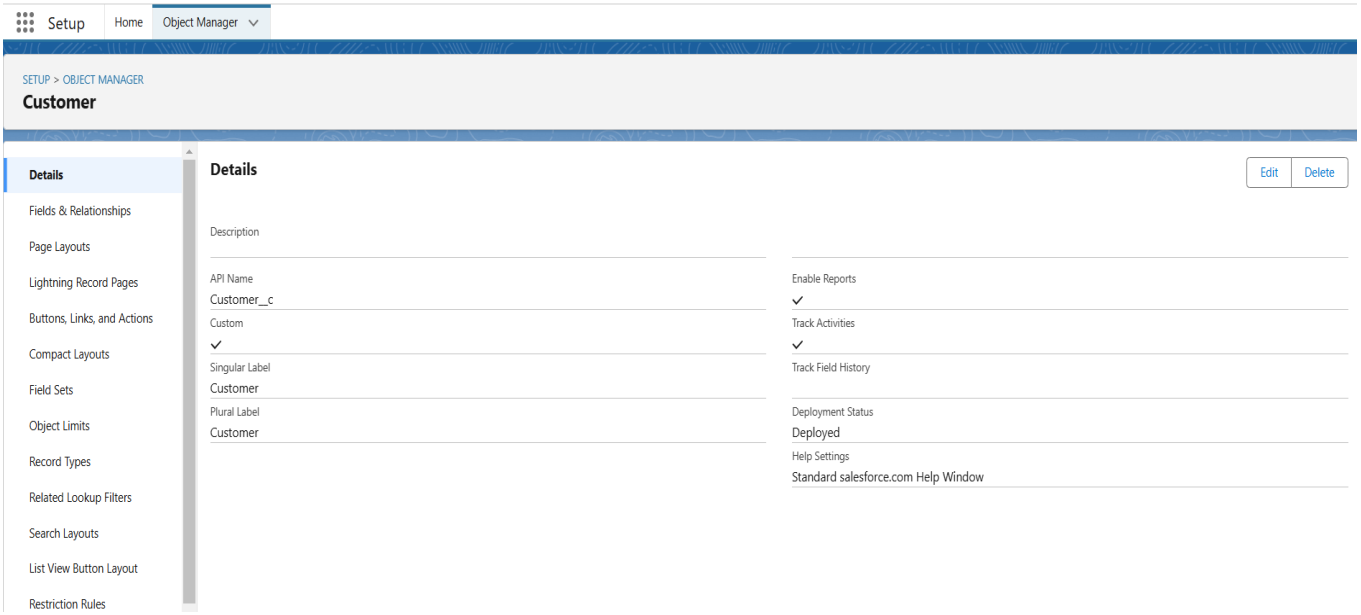
requirements.

- **Workflows and Process Automation:** To automate routine property management tasks.
- **Dashboards and Reports:** For generating real-time insights into property statuses and client interactions.
- **Mobile App Access:** To provide on-the-go accessibility for teams and clients

Activity 1:



Customer object:



Property object:

Create a custom object from a spreadsheet

Nice Work!

Now you can add your object to a Lightning app. You might need to refresh the object list to see it.

Import Overview

Object Created
Property

Fields Detected
4

Fields Created
4

Rows Detected
3

Rows Imported
3

Import Another Object

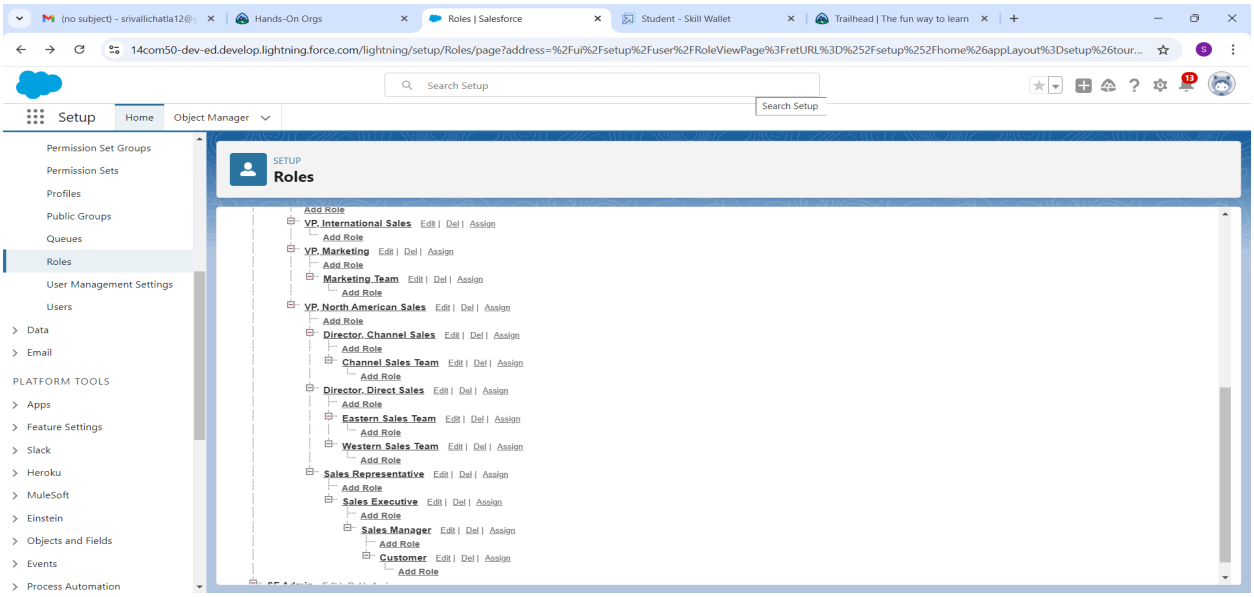
Activity 1:

Create a record
Send data from form fields to matched Salesforce fields

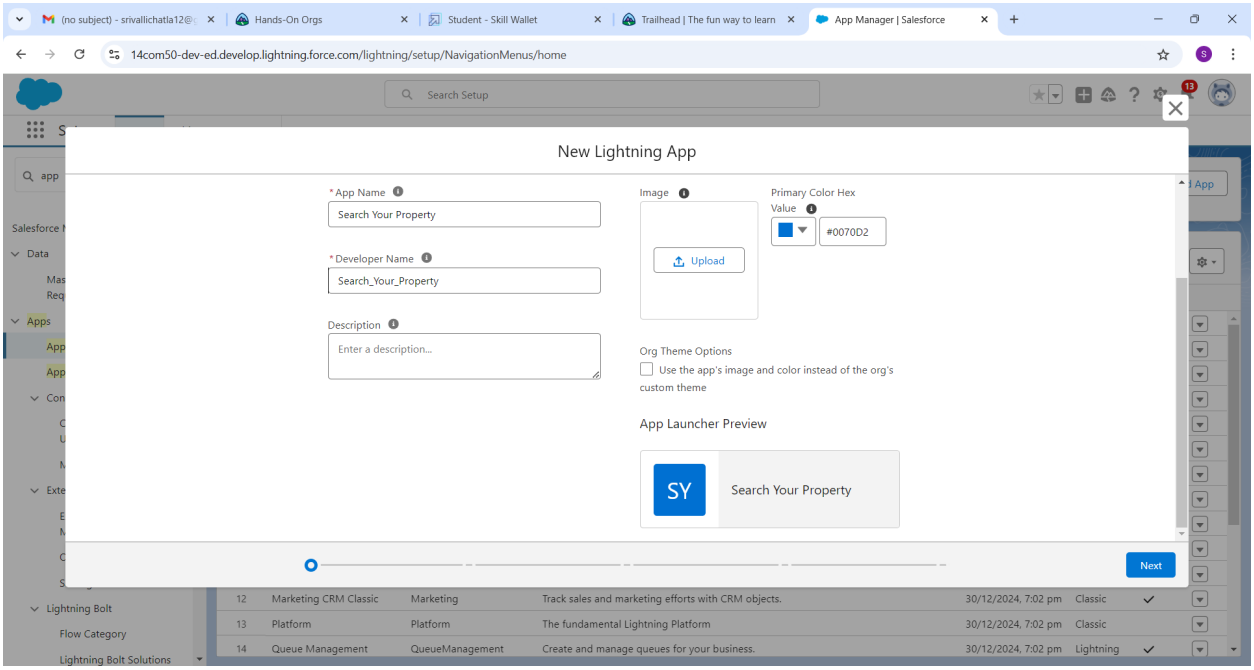
Object Fields	Dreams World
Customer	Name - First Name
City	Address - City
Budget Amount	Budget Amount
Property Type	Which type of Property ar...
Phone Number	Phone Number
Street Address	Address - Street Address
Email	Email
Customer Name	Name - Last Name
State	Address - State
Street Address line 2	Address - Street Address 2

+ Add Field

Sales Executive Role:

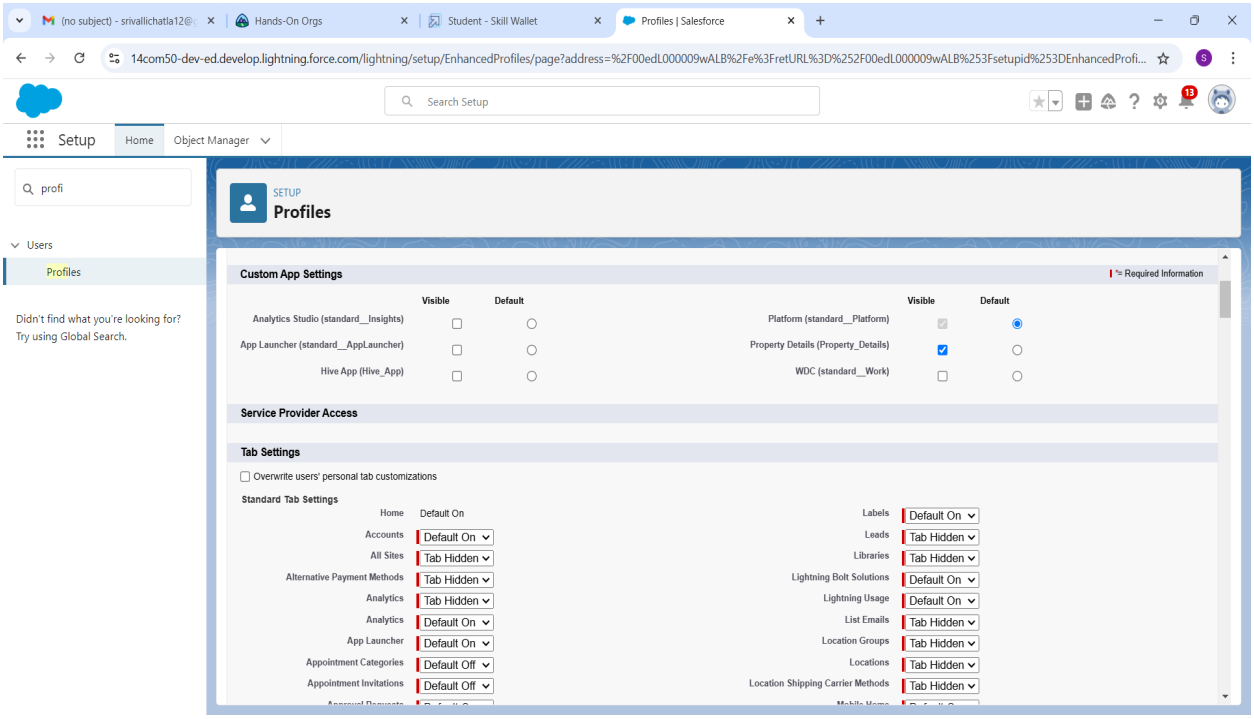


Property Details App:



profile creation:

Customer:


Profiles | Salesforce
Search Setup
Setup
Home
Object Manager
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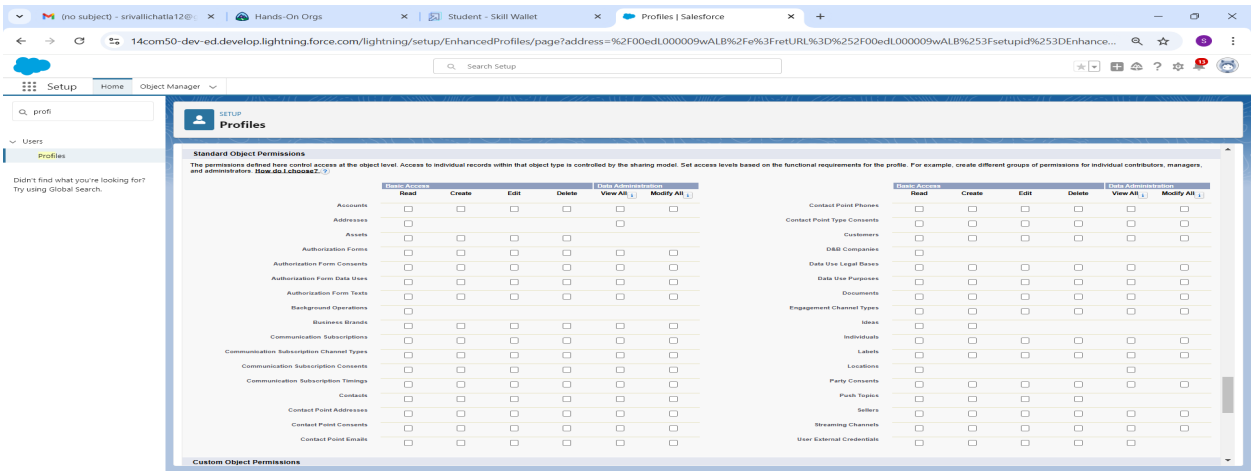
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Custom App Settings
Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Hive App (Hive_App)
Platform (standard__Platform)
Property Details (Property_Details)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home
Default On
Accounts
All Sites
Alternative Payment Methods
Analytics
Analytics
App Launcher
Appointment Categories
Appointment Invitations
Labels
Leads
Libraries
Lightning Bolt Solutions
Lightning Usage
List Emails
Location Groups
Locations
Location Shipping Carrier Methods


Profiles | Salesforce
Setup
Home
Object Manager
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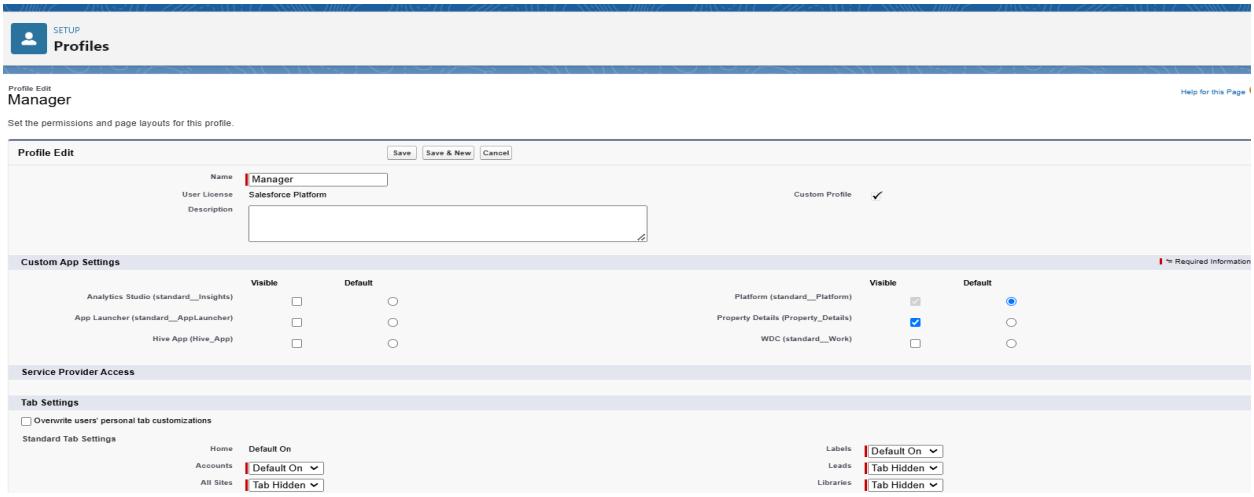
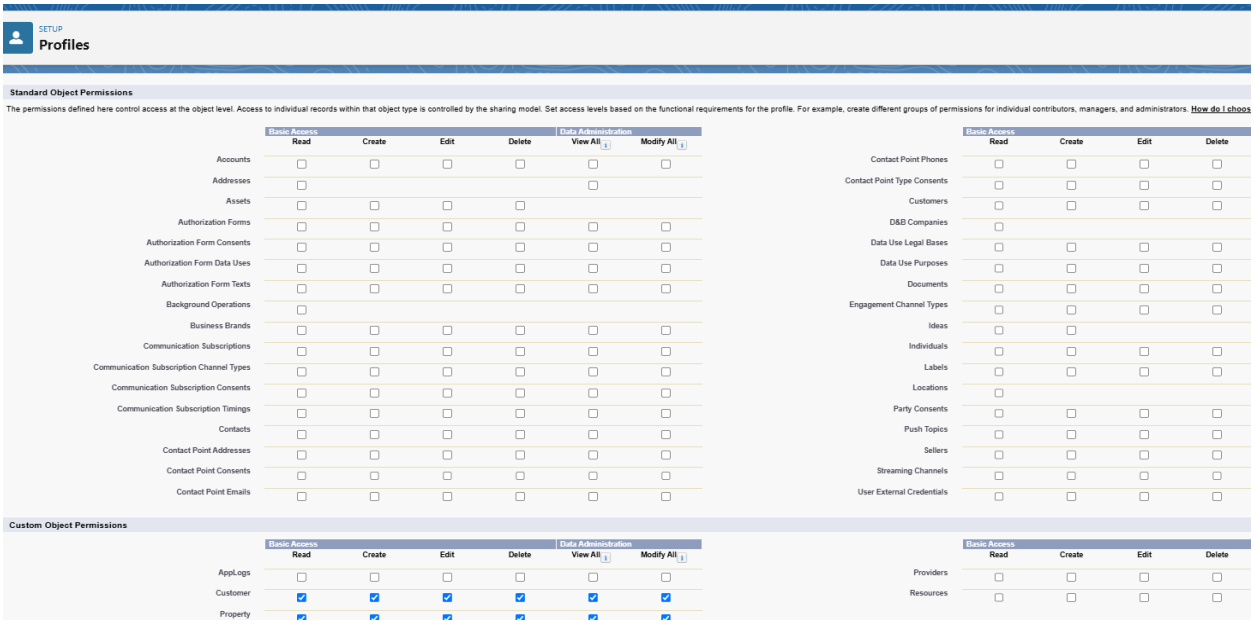
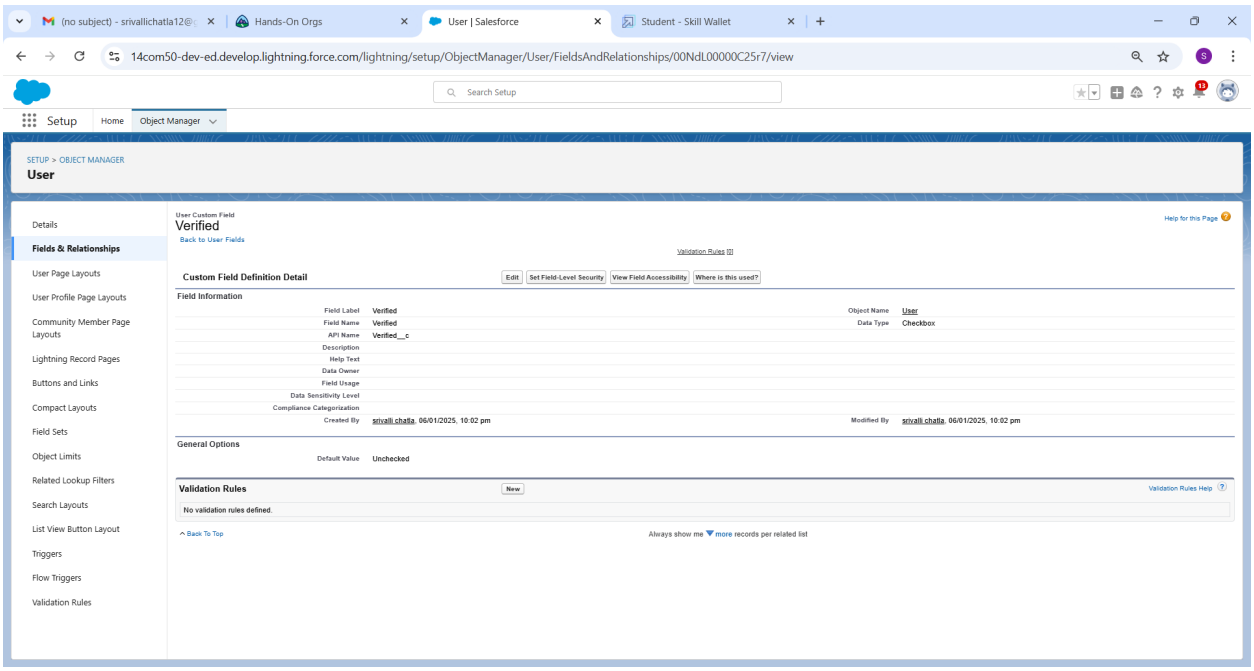
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Standard Object Permissions
Custom Object Permissions

Manager:



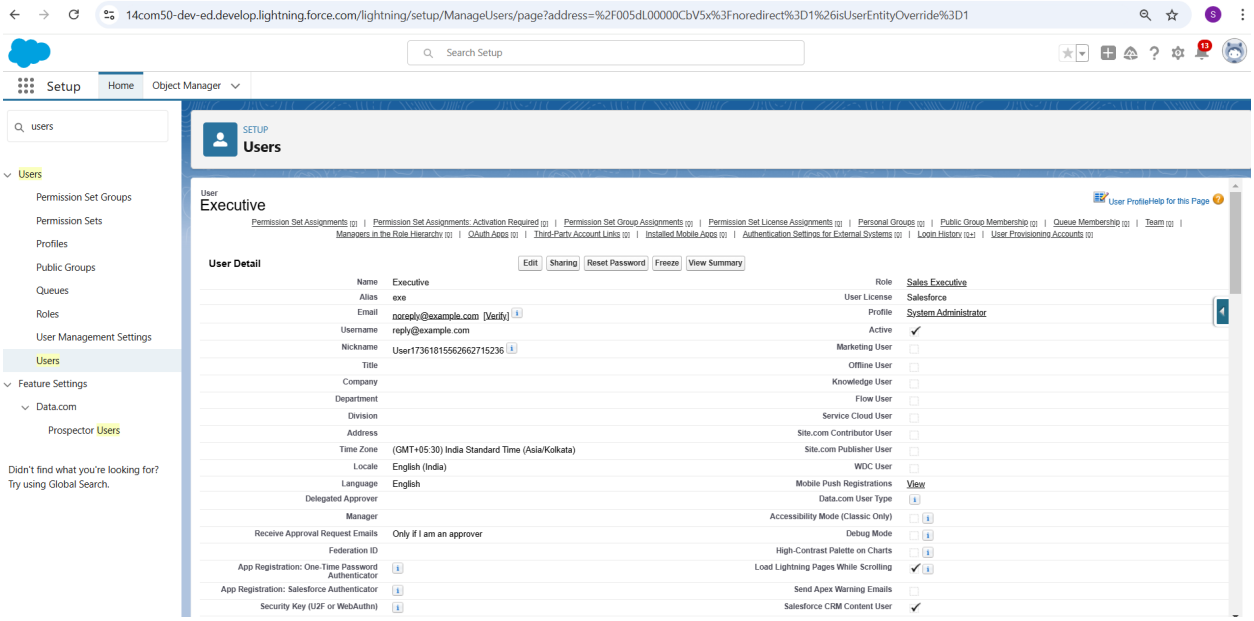


Create A Check Box Feild:

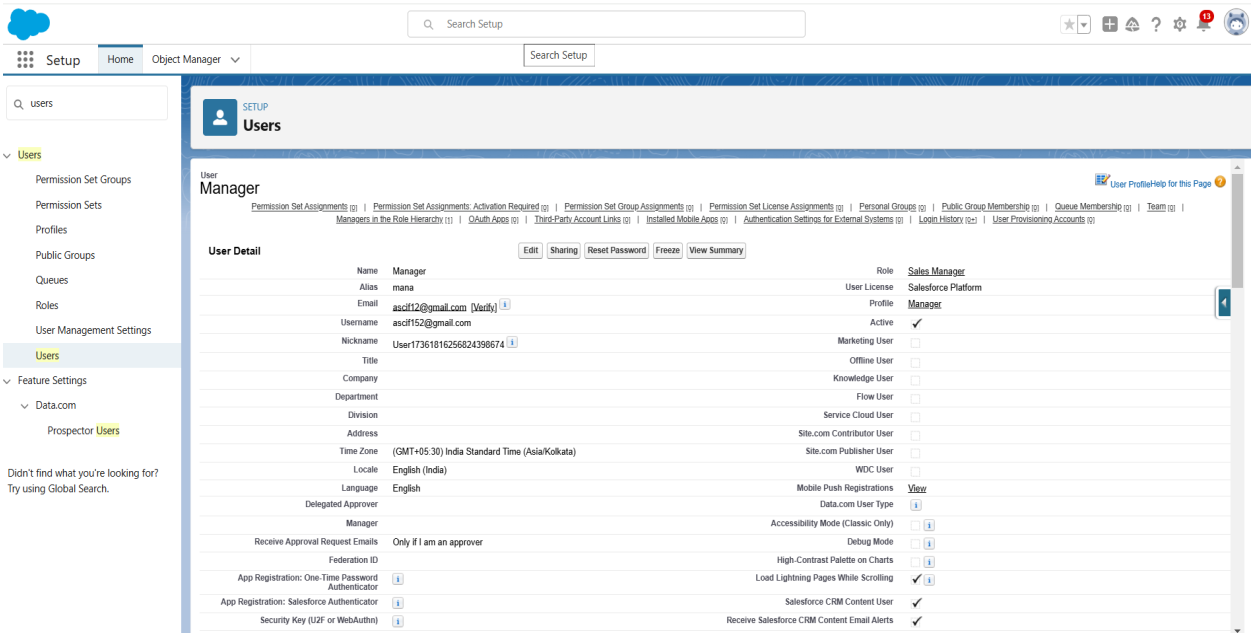


Creating Users:

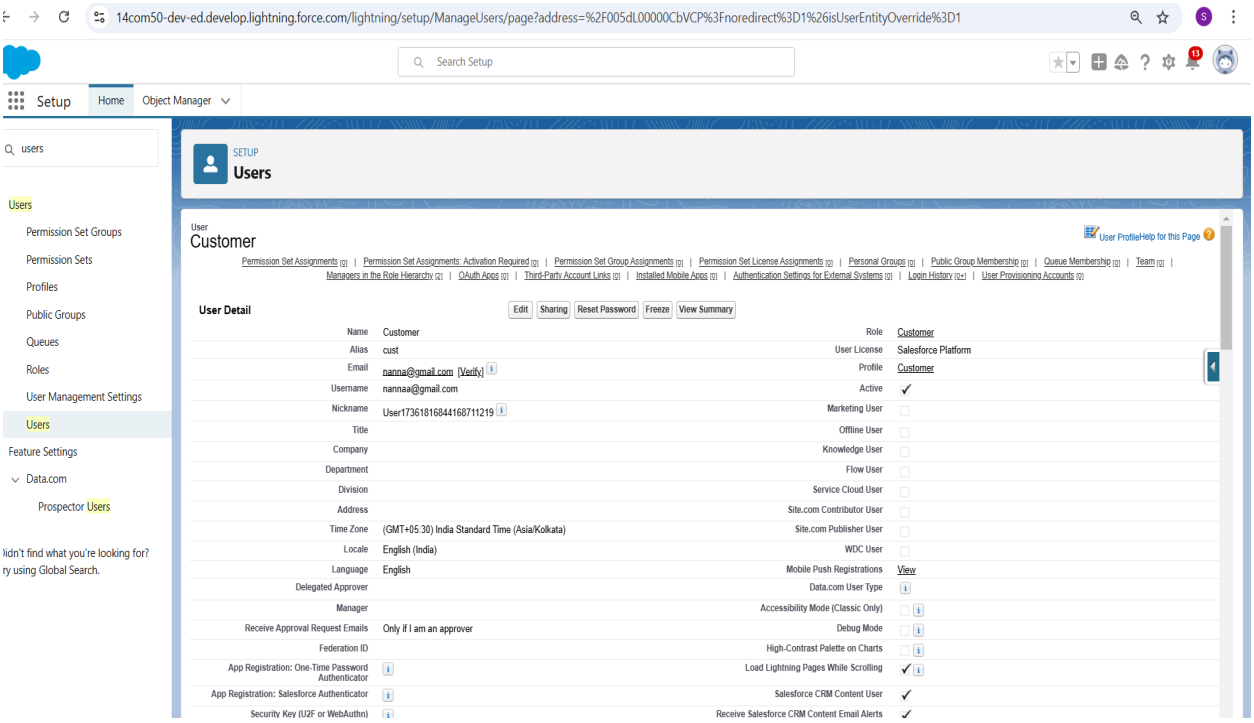
User 1:



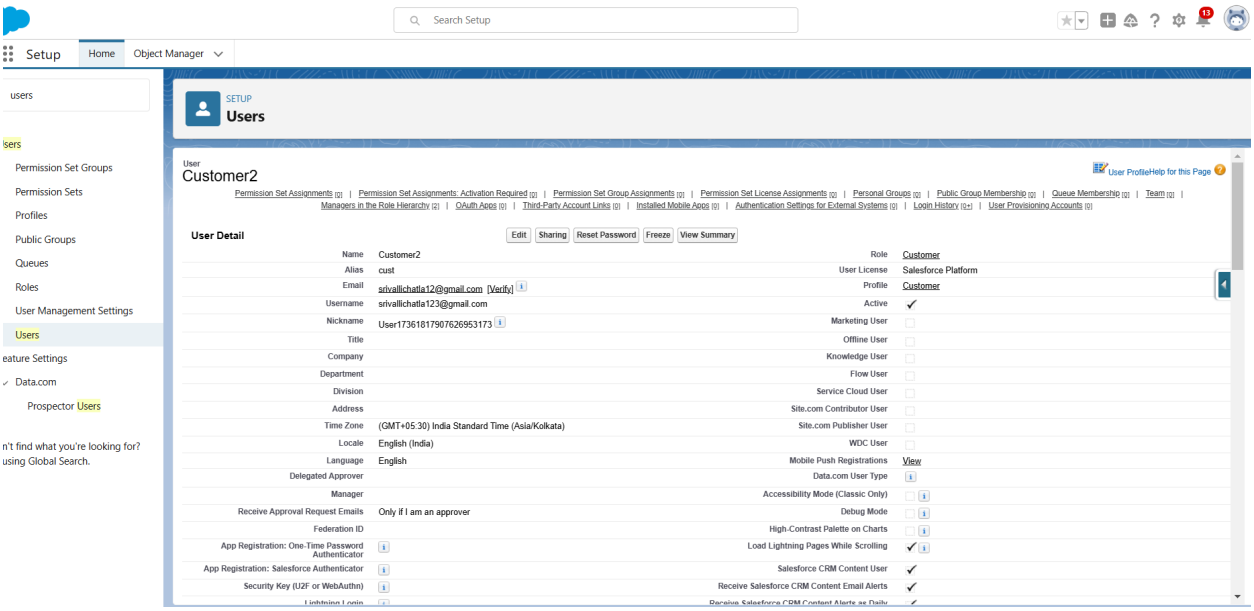
User 2:


Search Setup
Setup
Home
Object Manager
Search Setup
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Users
User
Manager
User ProfileHelp 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
Edit
Sharing
Reset Password
Freeze
View Summary
Name Manager
Alias mana
Email ascif12@gmail.com [Verify]
Username ascif152@gmail.com
Nickname User17361816256824398674
Title
Company
Department
Division
Address
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Delegated Approver
Manager
Receive Approval Request Emails Only if I am an approver
Federation ID
App Registration: One-Time Password Authenticator
App Registration: Salesforce Authenticator
Security Key (U2F or WebAuthn)
Role Sales Manager
User License Salesforce Platform
Profile Manager
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Mobile Push Registrations View
Data.com User Type
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Salesforce CRM Content User
Receive Salesforce CRM Content Email Alerts

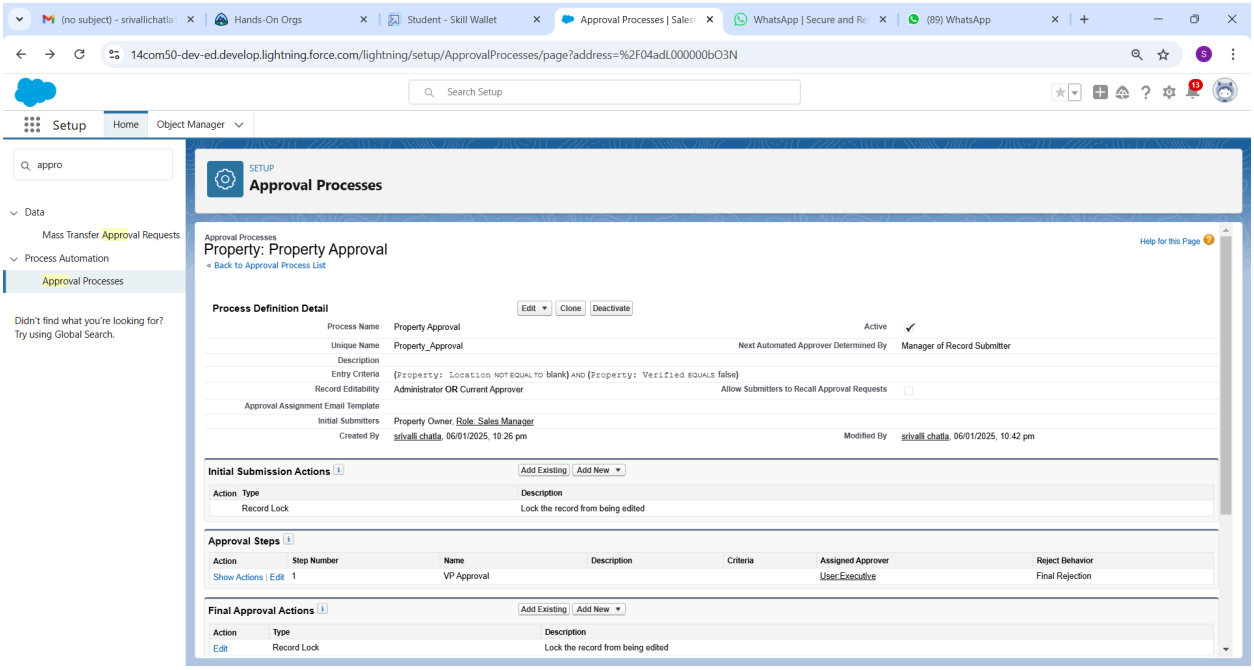
User 3:

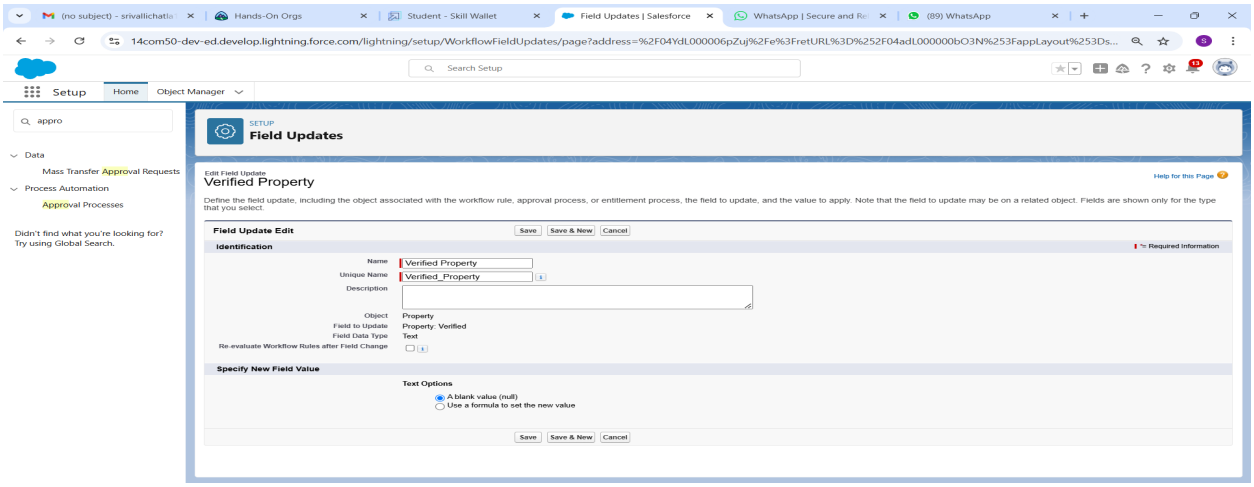

14com50-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005dL00000CbVCP%3Fnoredirect%3D1%26isUserEntityOverride%3D1
Search Setup
Setup
Home
Object Manager
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
SETUP
Users
User
Customer
User ProfileHelp 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
Edit
Sharing
Reset Password
Freeze
View Summary
Name Customer
Alias cust
Email nanna@gmail.com [Verify]
Username nannaa@gmail.com
Nickname User1736181684168711219
Title
Company
Department
Division
Address
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Delegated Approver
Manager
Receive Approval Request Emails Only if I am an approver
Federation ID
App Registration: One-Time Password Authenticator
App Registration: Salesforce Authenticator
Security Key (U2F or WebAuthn)
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
Mobile Push Registrations View
Data.com User Type
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Salesforce CRM Content User
Receive Salesforce CRM Content Email Alerts

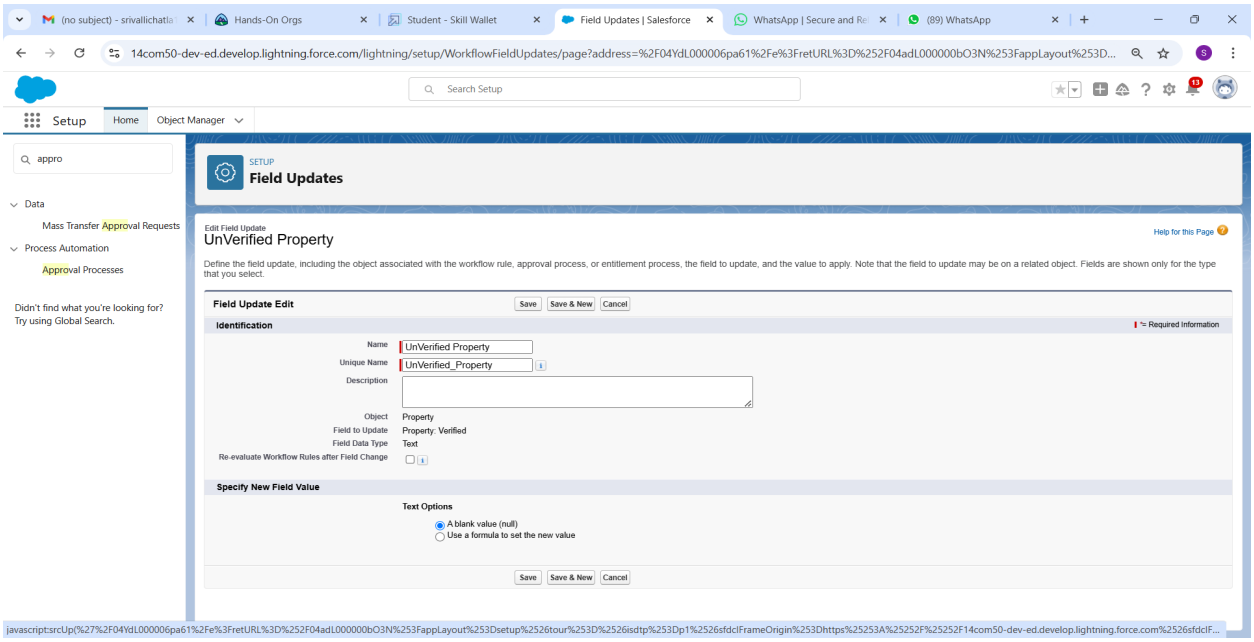
user 4:



Create Approval Process:




Setup
Home
Object Manager
appro
Data
Mass Transfer Approval Requests
Process Automation
Approval Processes
Didn't find what you're looking for?
Try using Global Search.
SETUP
Field Updates
Edit Field Update
Verified Property
Help for this Page
Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.
Field Update Edit
Save
Save & New
Cancel
Identification
Required Information
Name
Verified Property
Unique Name
Verified_Property
Description
Object
Property
Field to Update
Property: Verified
Field Data Type
Text
Re-evaluate Workflow Rules after Field Change
Specify New Field Value
Text Options
A blank value (null)
Use a formula to set the new value


Setup
Home
Object Manager
appro
Data
Mass Transfer Approval Requests
Process Automation
Approval Processes
Didn't find what you're looking for?
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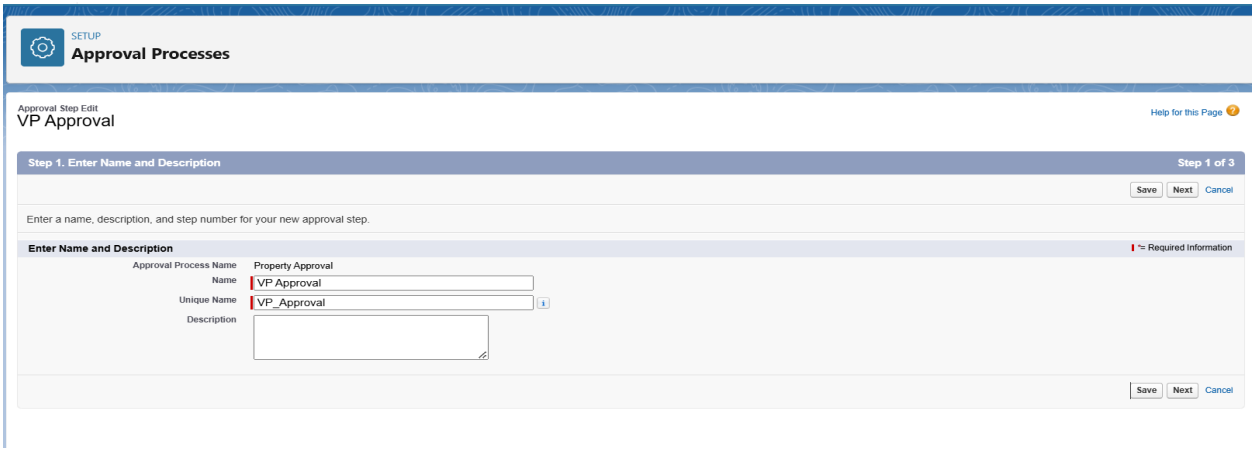
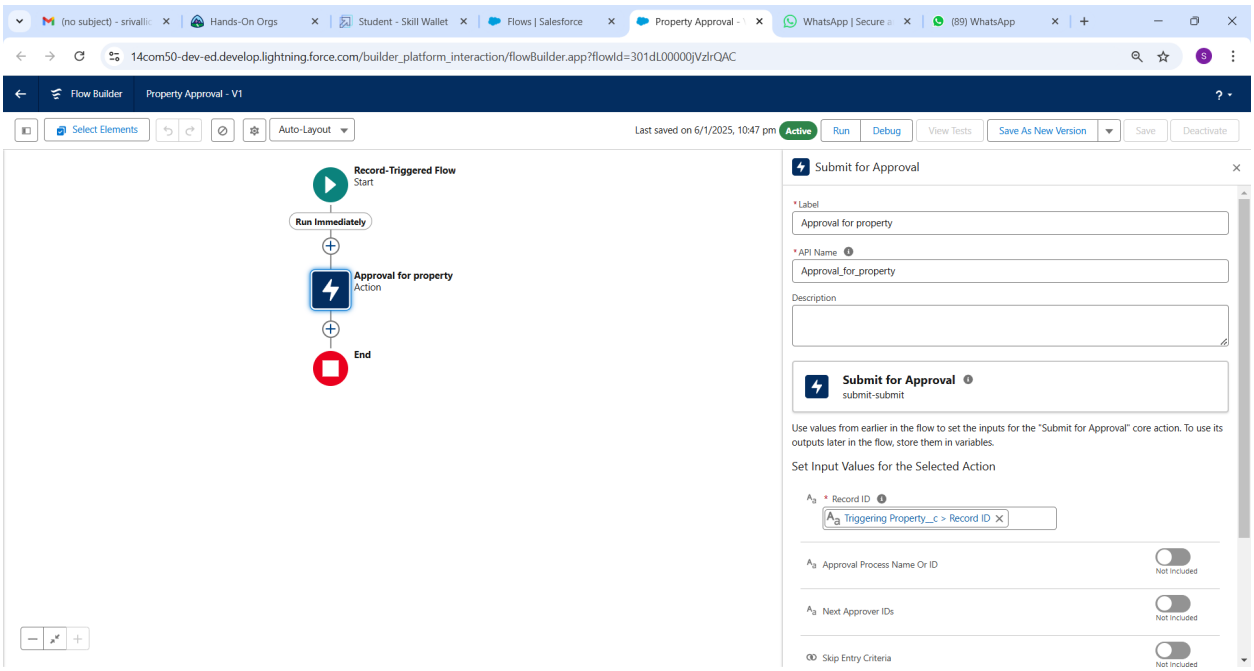
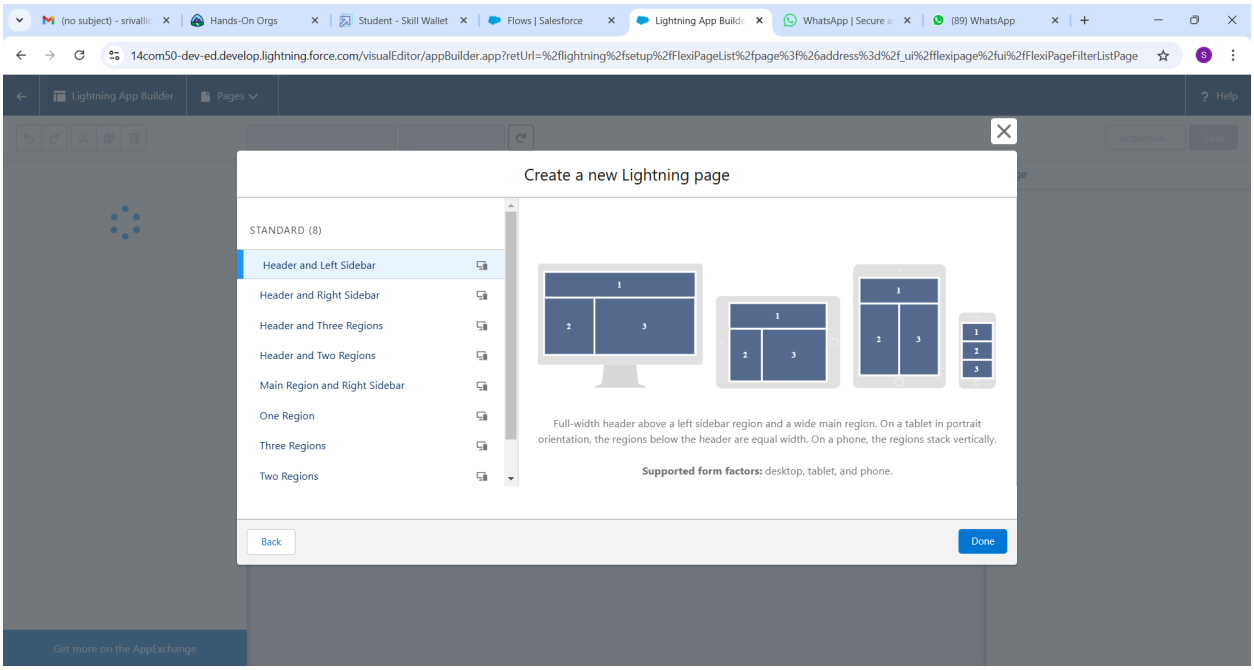
SETUP
Field Updates
Edit Field Update
UnVerified Property
Help for this Page
Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.
Field Update Edit
Save
Save & New
Cancel
Identification
Required Information
Name
UnVerified Property
Unique Name
UnVerified_Property
Description
Object
Property
Field to Update
Property: Verified
Field Data Type
Text
Re-evaluate Workflow Rules after Field Change
Specify New Field Value
Text Options
A blank value (null)
Use a formula to set the new value

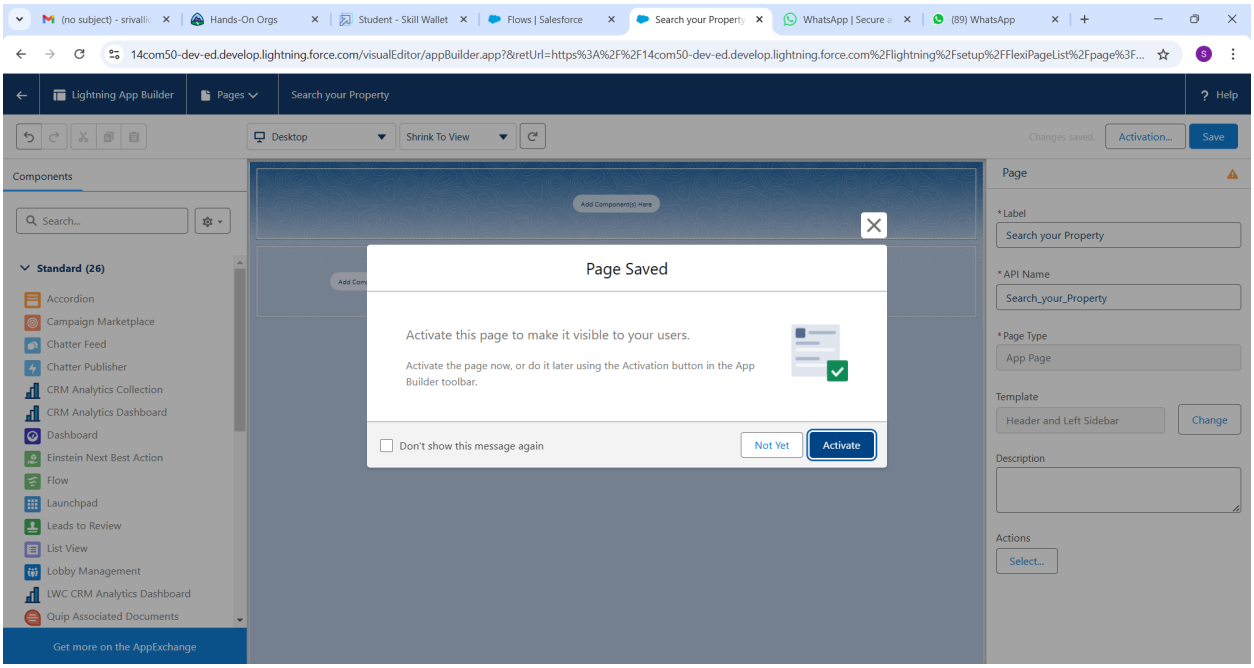

SETUP
Approval Processes
Approval Step Edit
VP Approval
Help for this Page
Step 1. Enter Name and Description
Step 1 of 3
Save
Next
Cancel
Enter a name, description, and step number for your new approval step.
Enter Name and Description
Required Information
Approval Process Name
Property Approval
Name
VP Approval
Unique Name
VP_Approval
Description

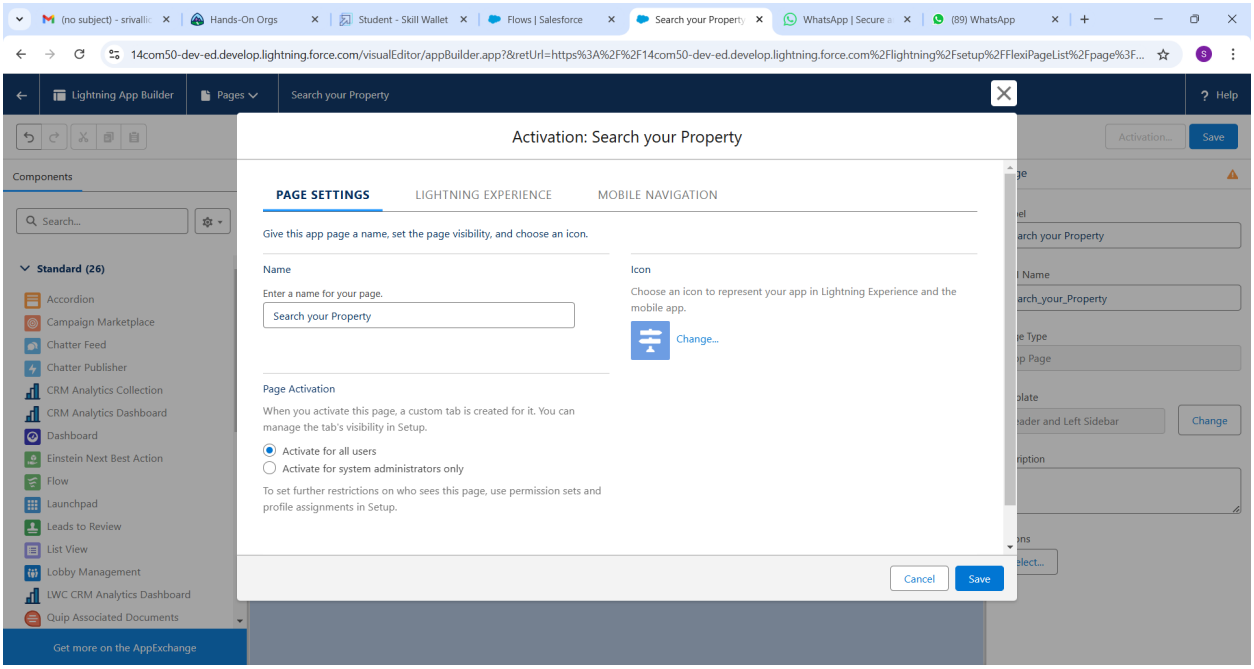
A Record Trigger Flow:

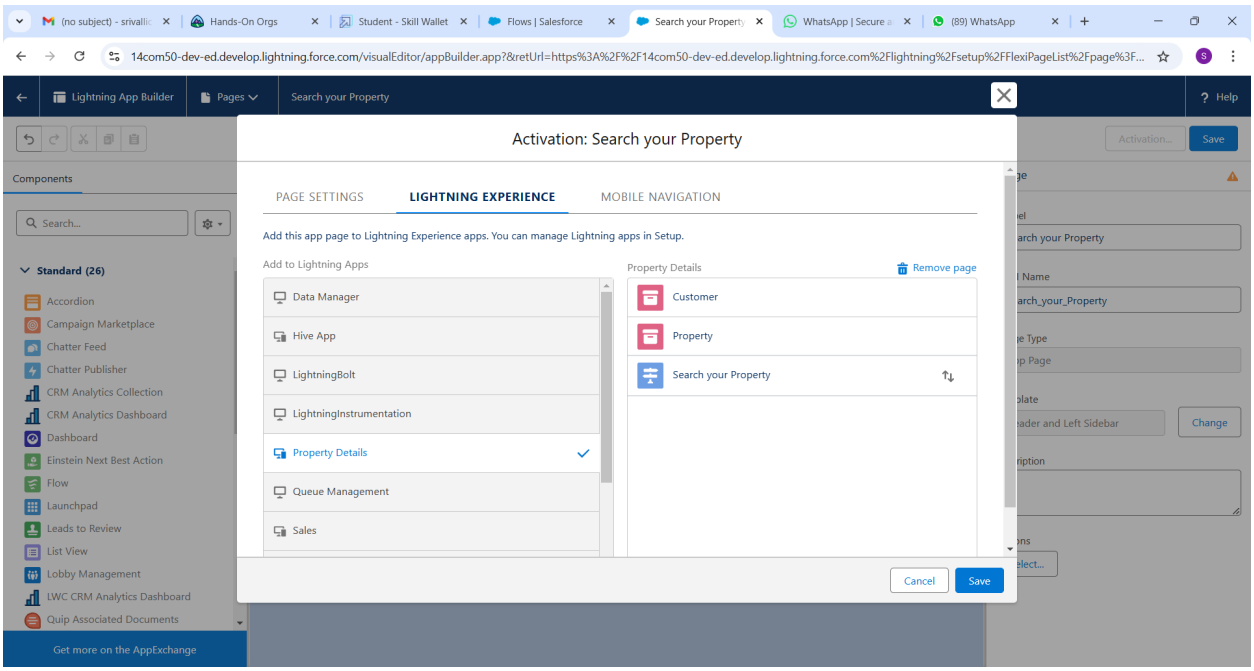


An App Page:

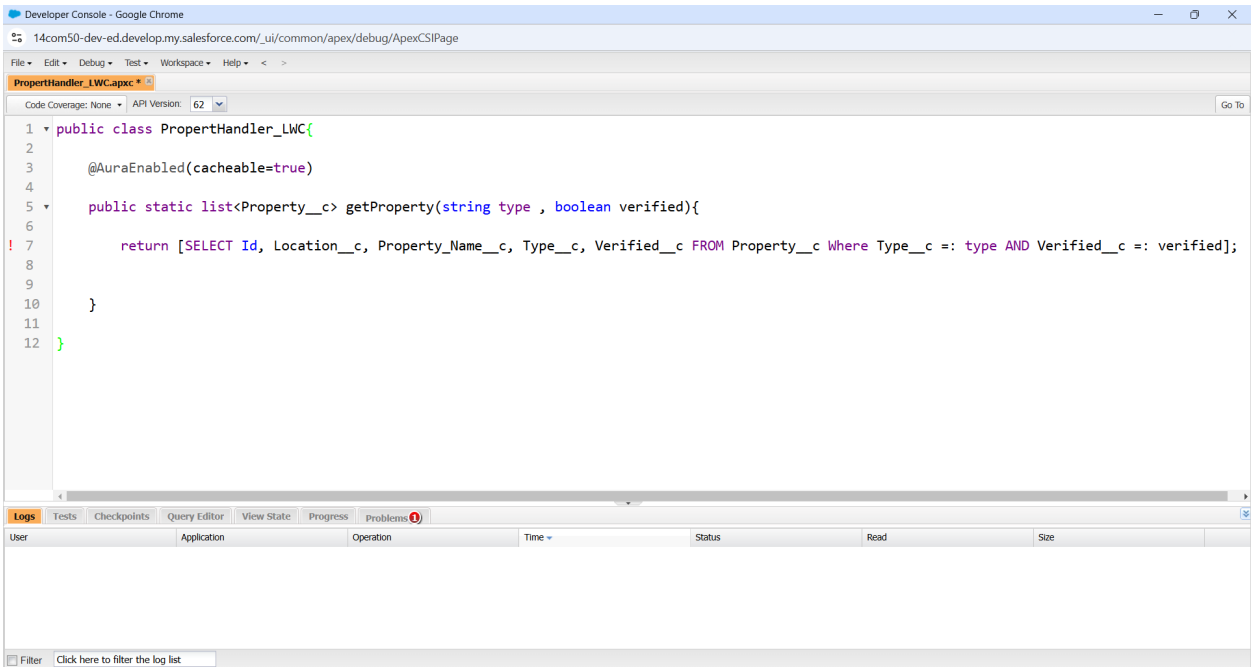


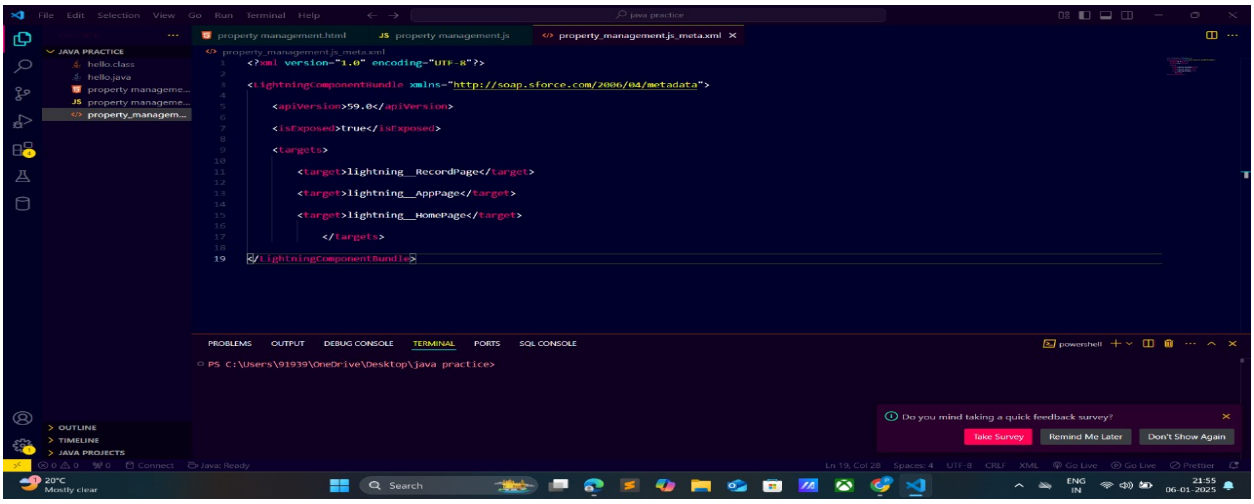

Lightning App Builder
Pages
Search your Property
Help
Desktop
Shrink To View
Activation...
Save
Components
Search...
Standard (26)
Accordion
Campaign Marketplace
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Einstein Next Best Action
Flow
Launchpad
Leads to Review
List View
Lobby Management
LWC CRM Analytics Dashboard
Quip Associated Documents
Get more on the AppExchange
Page Saved
Activate this page to make it visible to your users.
Activate the page now, or do it later using the Activation button in the App Builder toolbar.
Don't show this message again
Not Yet
Activate
Page
Label
Search your Property
API Name
Search_your_Property
Page Type
App Page
Template
Header and Left Sidebar
Change
Description
Actions
Select...


Lightning App Builder
Pages
Search your Property
Help
Activation...
Save
Components
Search...
Standard (26)
Accordion
Campaign Marketplace
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Einstein Next Best Action
Flow
Launchpad
Leads to Review
List View
Lobby Management
LWC CRM Analytics Dashboard
Quip Associated Documents
Get more on the AppExchange
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
When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup.
Activate for all users
Activate for system administrators only
To set further restrictions on who sees this page, use permission sets and profile assignments in Setup.
Cancel
Save



A LWC Component:




property management.html
property management.js
property_management.js_meta.xml
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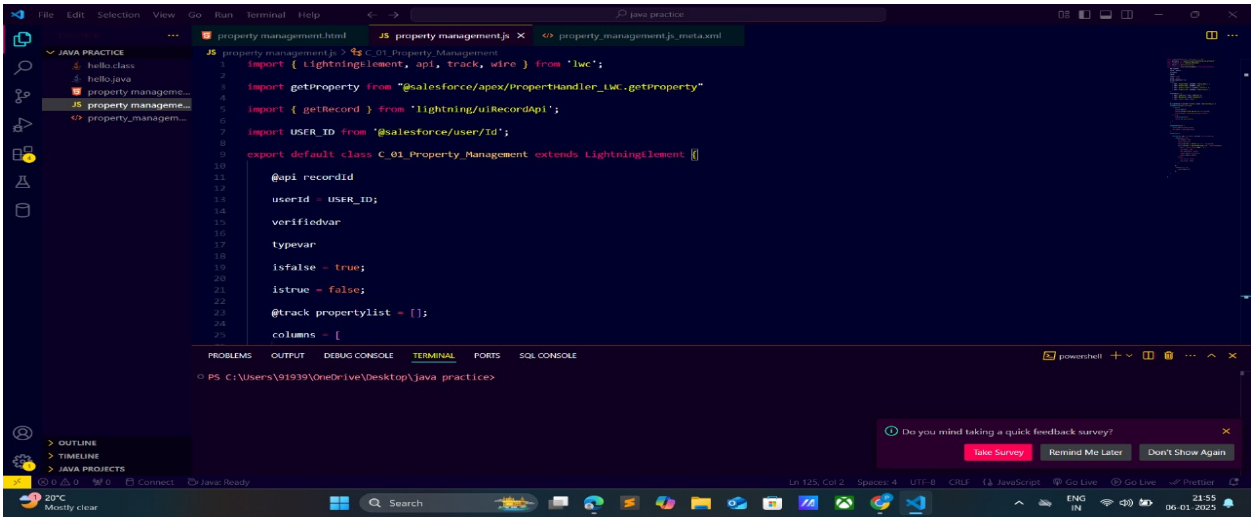
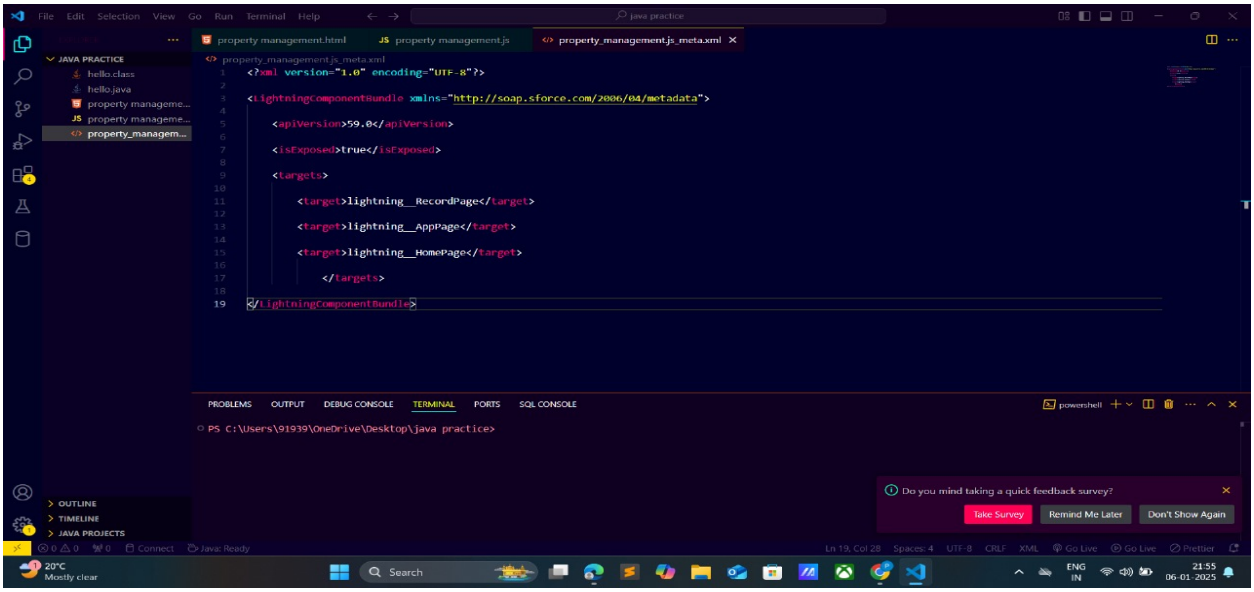
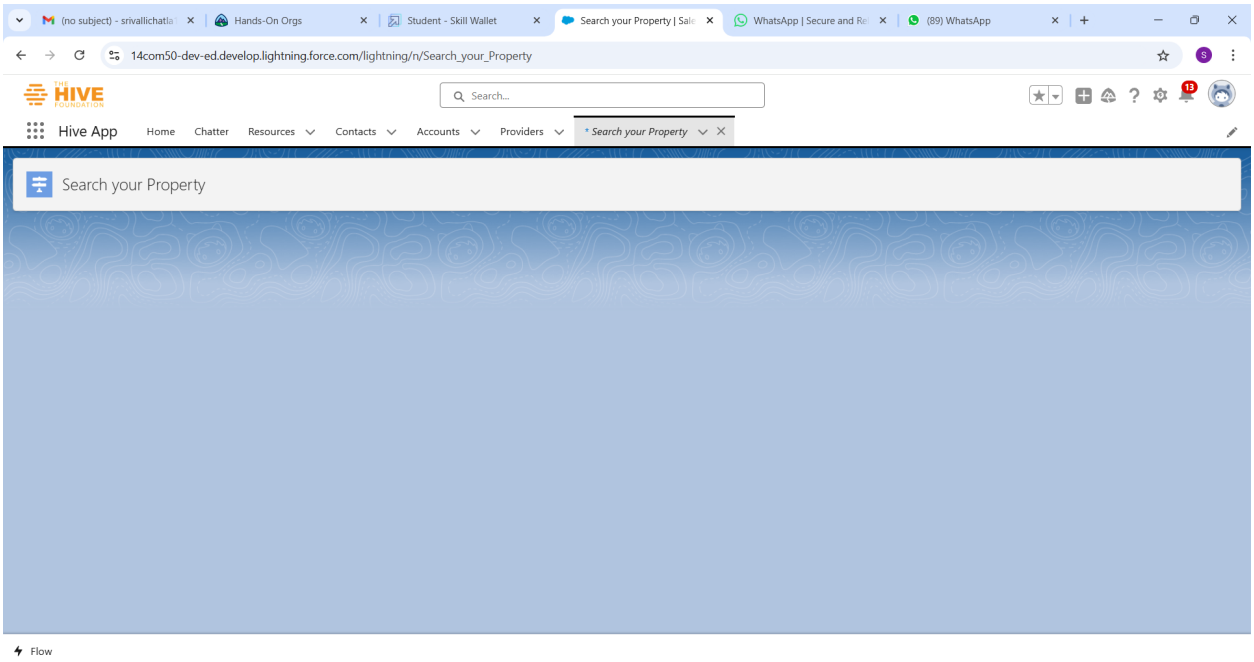
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
<apiVersion>59.0</apiVersion>
<isExposed>true</isExposed>
<targets>
<target>lightning__RecordPage</target>
<target>lightning__AppPage</target>
<target>lightning__HomePage</target>
</targets>
</LightningComponentBundle>
PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL PORTS SQL CONSOLE
PS C:\Users\91939\OneDrive\Desktop\java practice>


property management.html
property management.js
property_management.js_meta.xml
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 = [
PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL PORTS SQL CONSOLE
PS C:\Users\91939\OneDrive\Desktop\java practice>


property management.html
property management.js
property_management.js_meta.xml
<?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 SQL CONSOLE
PS C:\Users\91939\OneDrive\Desktop\java practice>

Activity 1:



Access of Apex Classes to profiles:

4. Detailed Steps to Solution Design

1. Requirement Gathering:

- Understand the key pain points and requirements related to property management and client interactions.
- Document the needs associated with managing client information, property details, service requests, and sales processes.

2. Data Model Design:

- Create custom objects such as Client, Property, ServiceRequest, and Contract.
- Define relationships between objects (e.g., Clients and Properties, Properties and Service Requests).

3. UI Design:

- Develop user-friendly Lightning pages for key entities such as Client Profiles, Property Records, and Service Request Details.
- Implement search functionality to allow quick access to client and property records.

4. Business Logic Implementation:

- Use Apex classes and triggers to enforce custom business rules, such as notifying clients about upcoming property-related deadlines.
- Configure validation rules to ensure accurate data entry for client and property records.

5. Automation:

- Create workflows for sending automated emails and notifications, such as reminders for contract renewals or property inspections.
- Use Process Builder to set up follow-up reminders and alerts based on property statuses or service request progress.

6. Reports and Dashboards:

- Build dashboards to provide insights into property statuses, client interactions, and service request resolution times.
- Configure real-time reports to track property performance, service trends, and key client metrics.

5. Testing and Validation

- **Unit Testing:**
  - Test Apex classes and triggers to ensure proper functionality of custom business logic.
- **User Interface Testing:**
  - Validate the usability and responsiveness of Lightning pages across different devices and browsers.
- **Integration Testing:**
  - Verify data flows between Salesforce components and any integrated third-party systems (e.g., property listing services, financial platforms).
- **User Acceptance Testing (UAT):**
  - Engage end-users, including sales and service teams, to test the application against real-world property management scenarios.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

- Efficient tracking of property-related tasks and service requests.
- Maintaining accurate property records and client information with automated updates.
- Generating detailed reports on client interactions, property performance, and service trends.
- Automating repetitive tasks, such as contract renewal reminders and follow-up emails.
- Enabling mobile access for field agents to manage client and property data on the go.
- Providing a 360-degree view of client and property information to improve service quality and decision-making.

7. Conclusion

Summary of Achievements:

- Successfully implemented a customized CRM solution for managing clients and their property-related requirements using Salesforce.
- Streamlined property management and service request handling processes.
- Enhanced client relationship management through automation, real-time insights, and improved user experiences.
- Empowered teams with tools to make data-driven decisions, improving operational efficiency and client satisfaction.