A CRM Application to Handle the Client and their Property Related Requirements

By

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Project Abstract

This paper presents the design and development of a Customer Relationship Management (CRM) application specifically tailored to manage clients and their property-related requirements. The application aims to bridge the gap between real estate professionals and clients by offering a centralized platform for efficient interaction, data management, and service personalization.

Key features of the CRM include client profile management, property cataloging, requirement tracking, and automated notifications. It also incorporates advanced functionalities such as analytics-driven recommendations, appointment scheduling, and document management. The system leverages a user-friendly interface combined with secure, scalable architecture to ensure data privacy and seamless user experience.

By streamlining processes such as communication, lead tracking, and property matching, the application enhances operational efficiency and client satisfaction. The proposed solution is expected to benefit real estate firms by enabling better client engagement, reducing turnaround time, and improving overall business outcomes.

Introduction

In today's fast-paced business environment, managing client relationships effectively is critical for any organization aiming to deliver exceptional service and maintain a competitive edge. A **Customer Relationship Management (CRM) application** designed specifically to handle client and property-related requirements can significantly enhance operational efficiency, foster better client interactions, and streamline property management processes.

This CRM application is a comprehensive tool tailored to meet the needs of businesses in the real estate and property management sector. It provides a centralized platform to manage client information, track property listings, monitor client inquiries, and streamline communication. The application also enables businesses to analyze client preferences, ensuring a personalized experience that builds trust and long-term relationships.

With features such as automated workflows, robust reporting, and seamless integration capabilities, this CRM serves as a bridge between client expectations and service delivery. By using this application, businesses can focus on building meaningful relationships with clients while efficiently managing property-related operations.

This introduction emphasizes the core purpose of the CRM Application—streamlining client and property management for enhanced business outcomes. Would you like to highlight any specific features or benefits in more detail?

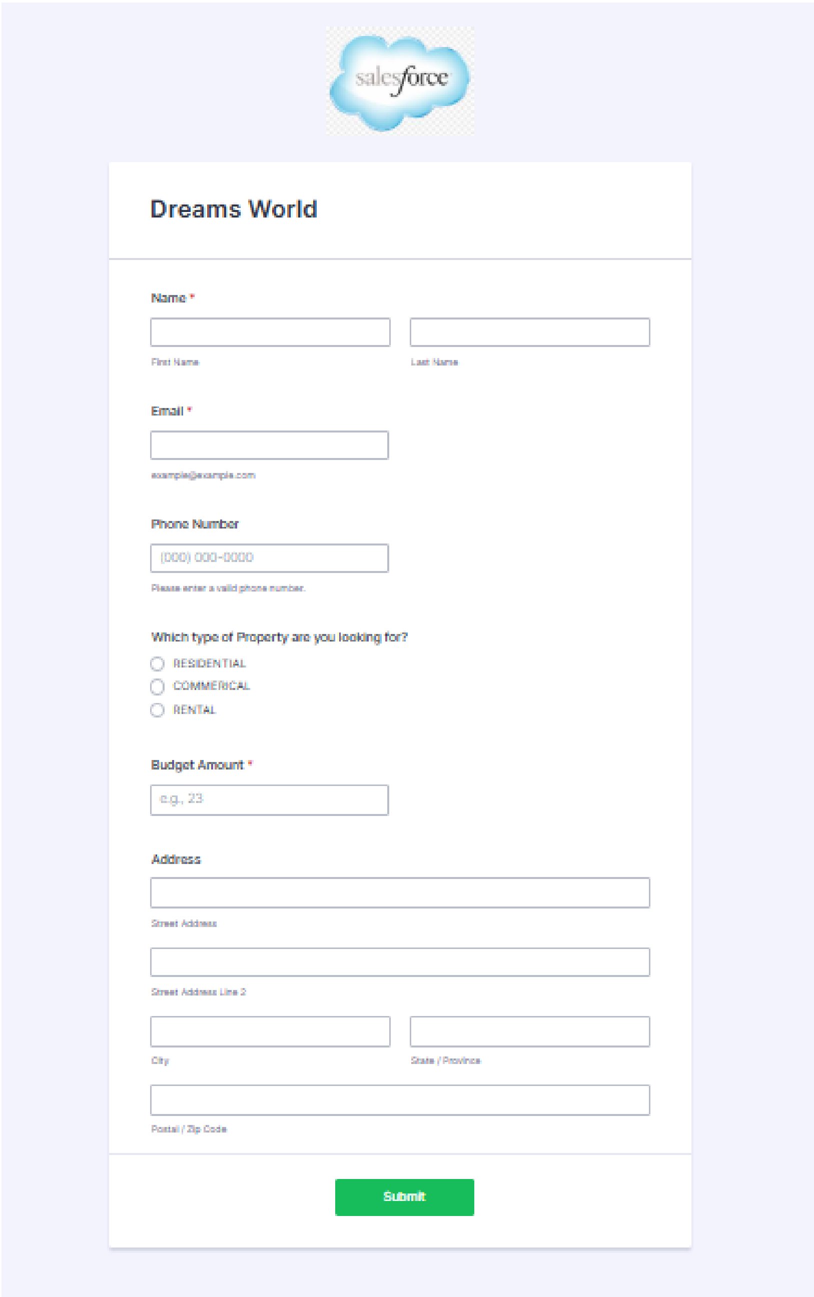
Task 1: Milestone 1 :- Create a Jotform and integrate it with the org to create a record of customers automatically.

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

Creating a form to get the Customer detail like Name, Phone, Email, Which type of Property are you looking for ?, Budget amount and Address.

My form : https://form.jotform.com/243132807961053


salesforce

Dreams World

Name *

First Name | Last Name

Email *

example@example.com

Phone Number

(000) 000-0000

Please enter a valid phone number.

Which type of Property are you looking for?

- RESIDENTIAL
- COMMERICAL
- RENTAL

Budget Amount *

e.g., 23

Address

Street Address

Street Address Line 2

City | State / Province

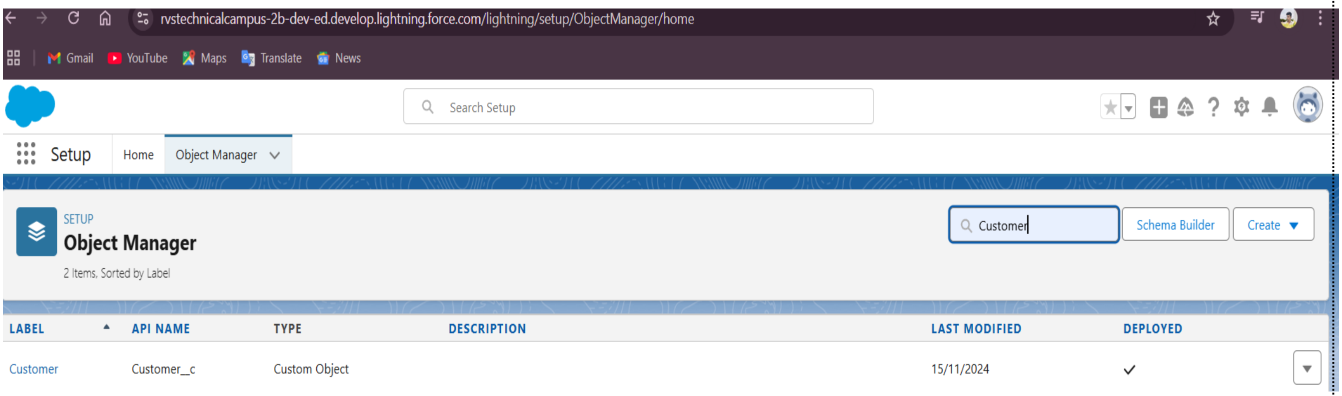
Postal / Zip Code

Submit

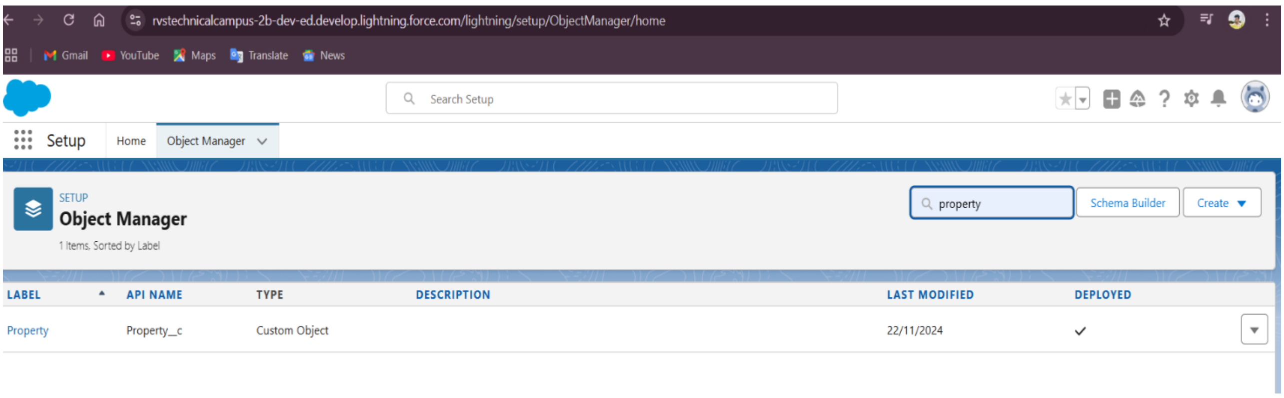
Task 2 : Create Objects from Spreadsheet.

Directly Creating Objects from Spreadsheet in Salesforce.

- Create Customer object



- Create Property object

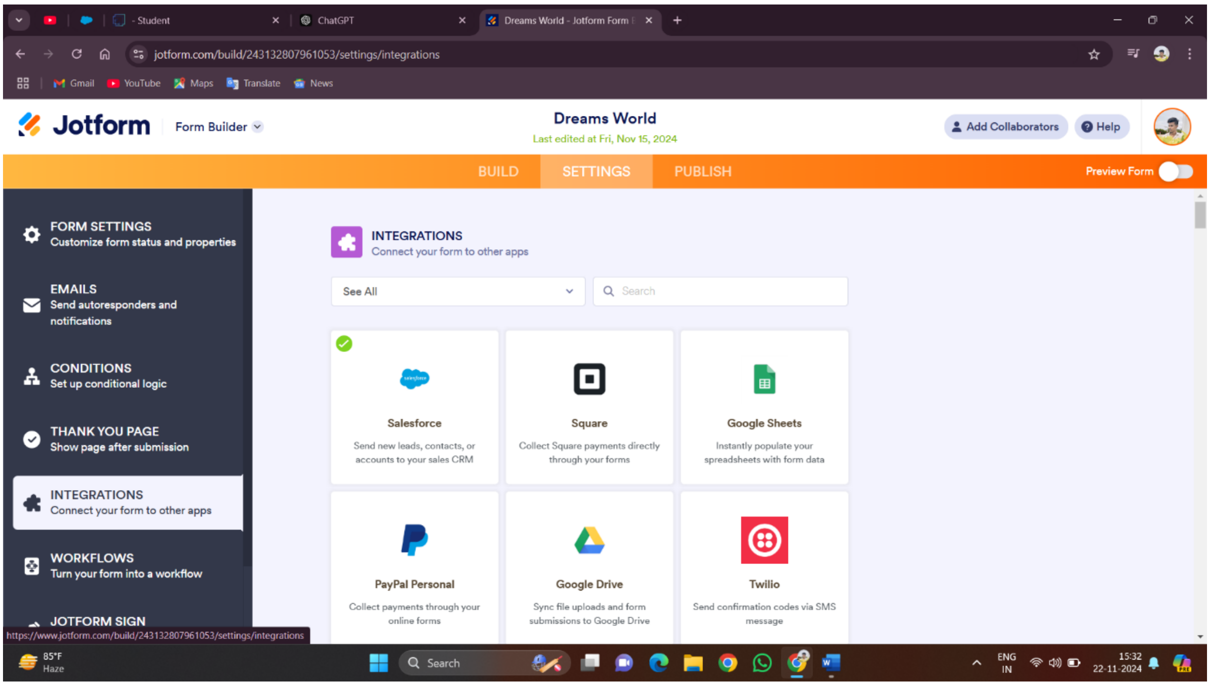


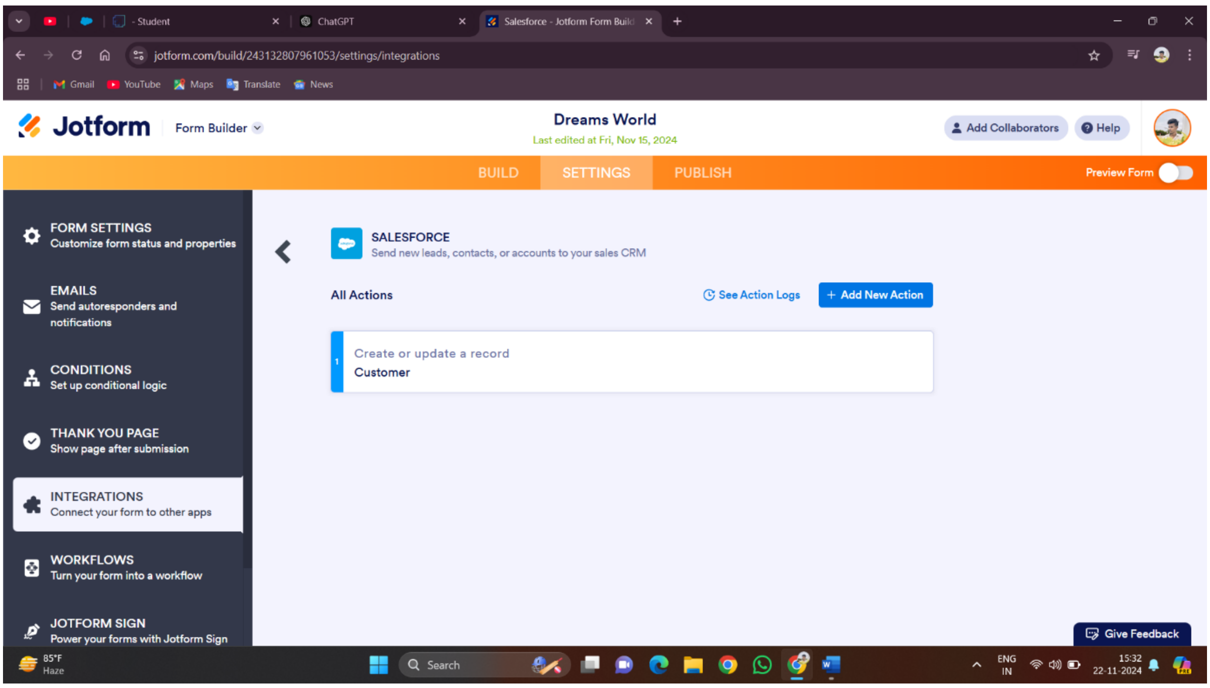
Task 3 : Integrate Jotform with Salesforce Platform.

In this Milestone we are going to integrate jotform with Salesforce.

Activity : 1

Integrate Jotform with Salesforce to create Customer records.

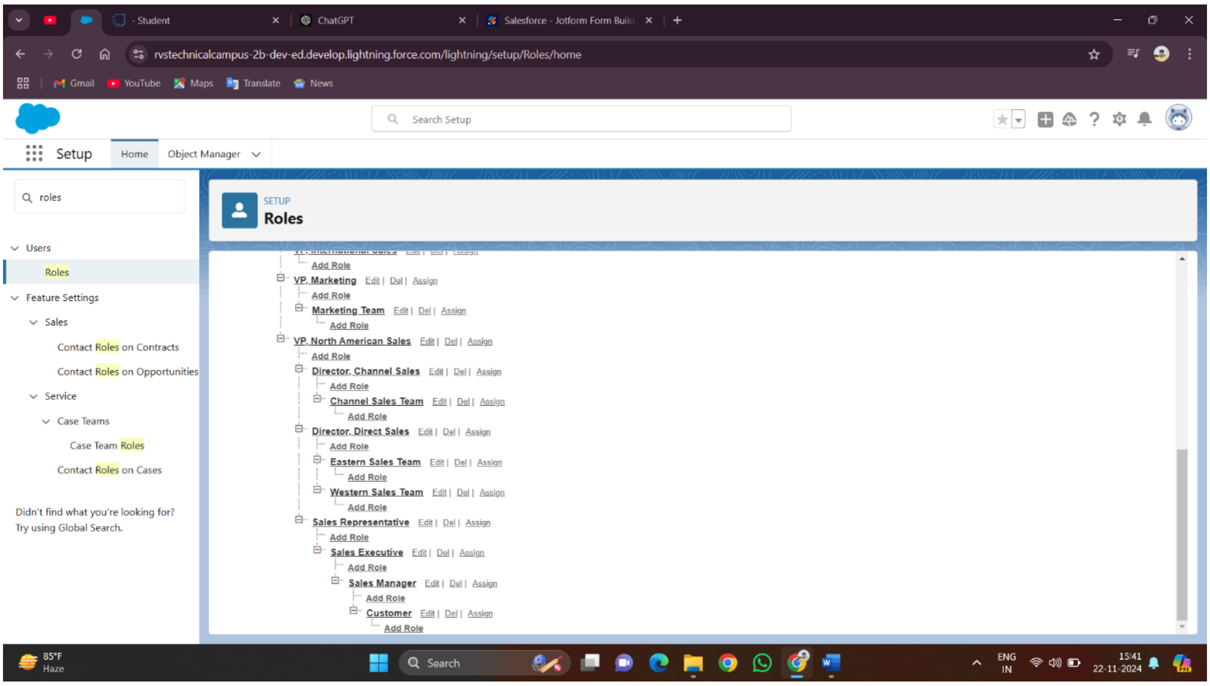




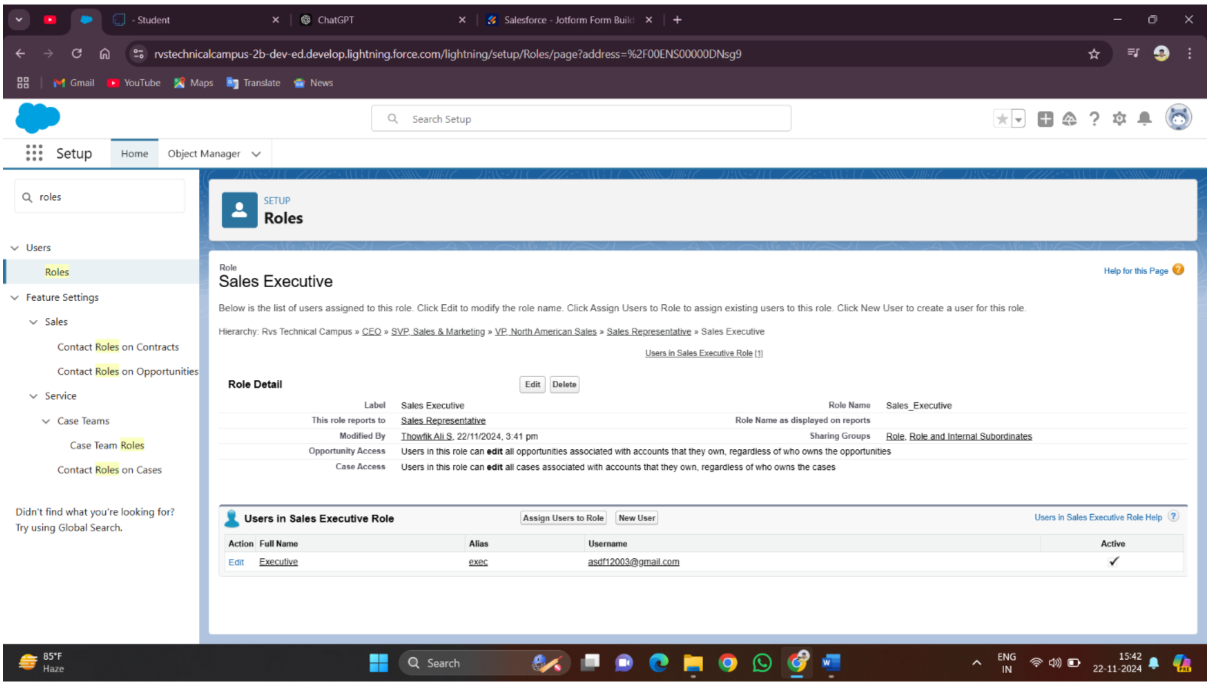
Task 4 : Create Roles- Create Roles as per business requirenment.

Sales Executive Role:

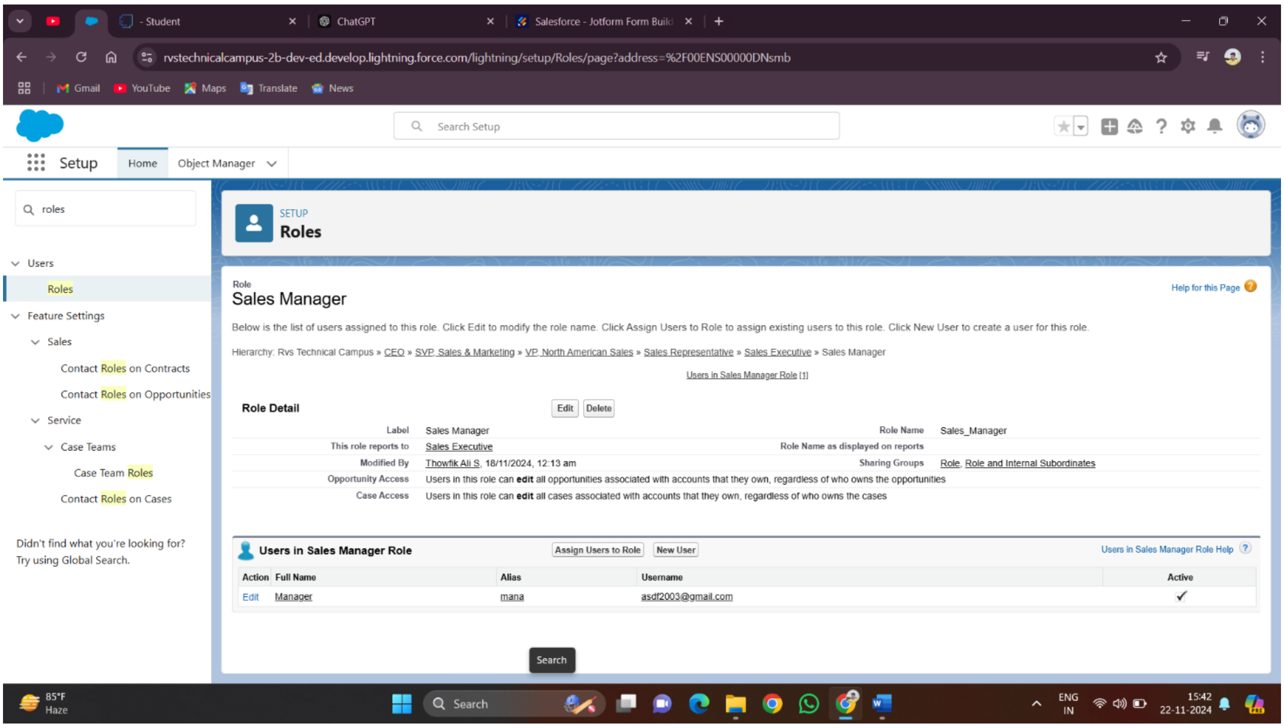
Create a hierarchical role structure in Salesforce: Sales Executive below Sales



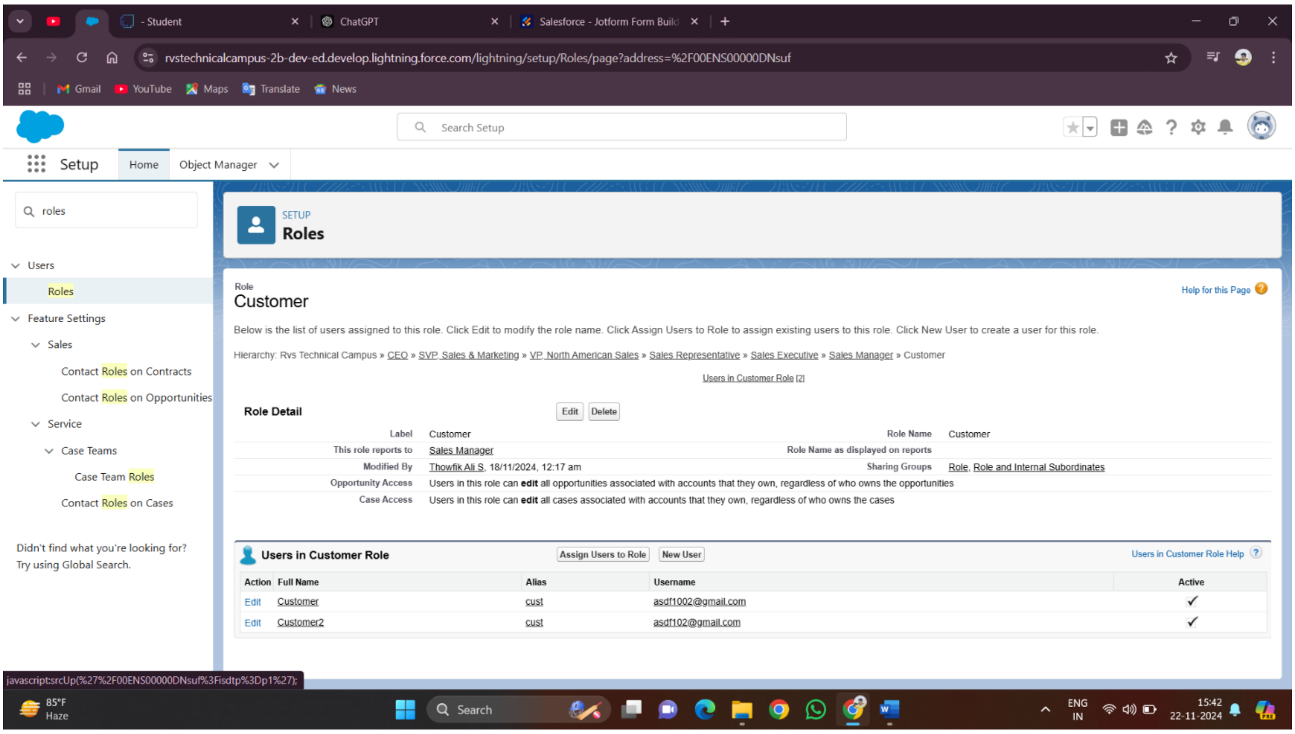
- Sales Executive



- Sales Manager



- Customer

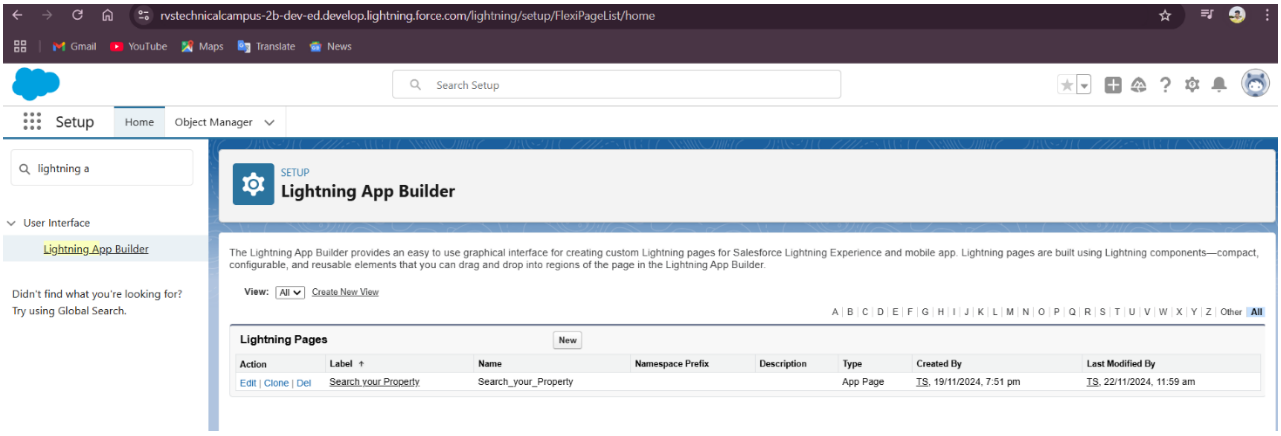


Task 5 : Create a Property Details App.

An App where the objects will be displayed.

Activity : 1

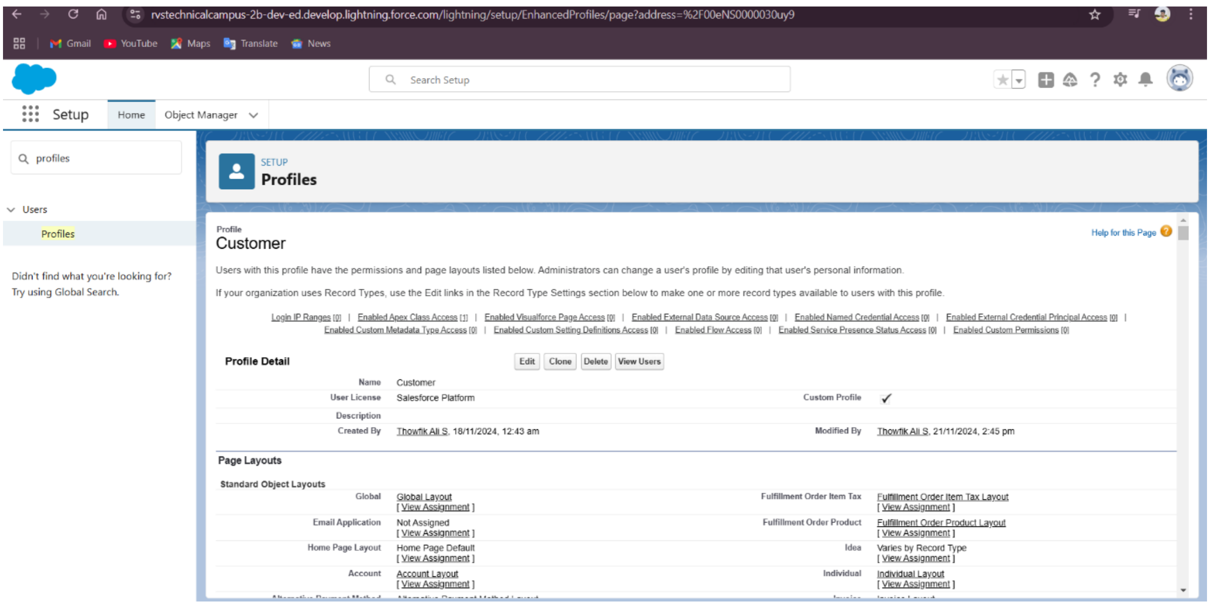
Create a new Lightning App named “Property Details” and add “Customer” and “Property” Object.

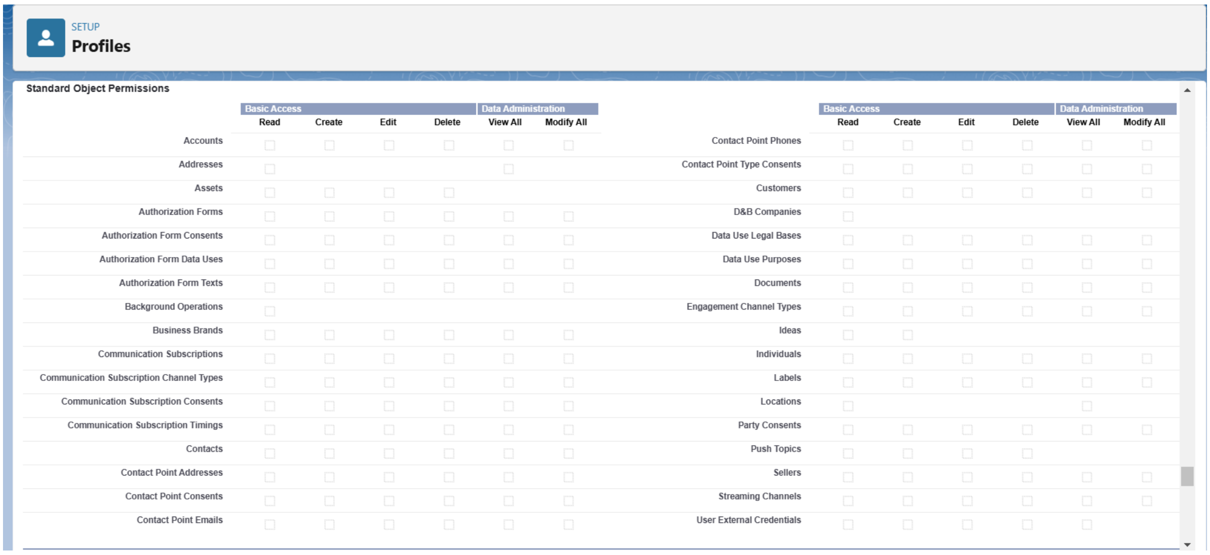


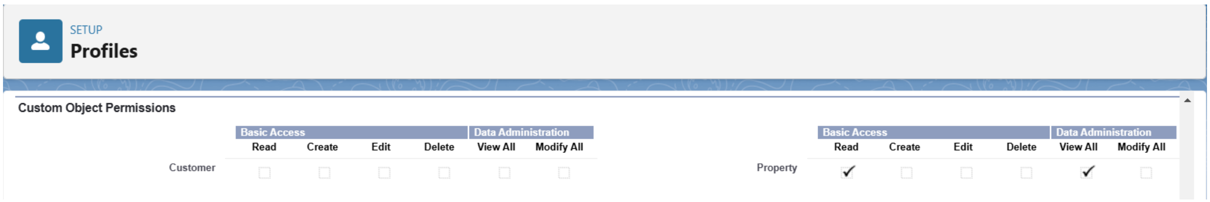
Task 6 : Create Profiles.

Create profiles as per business requirement.

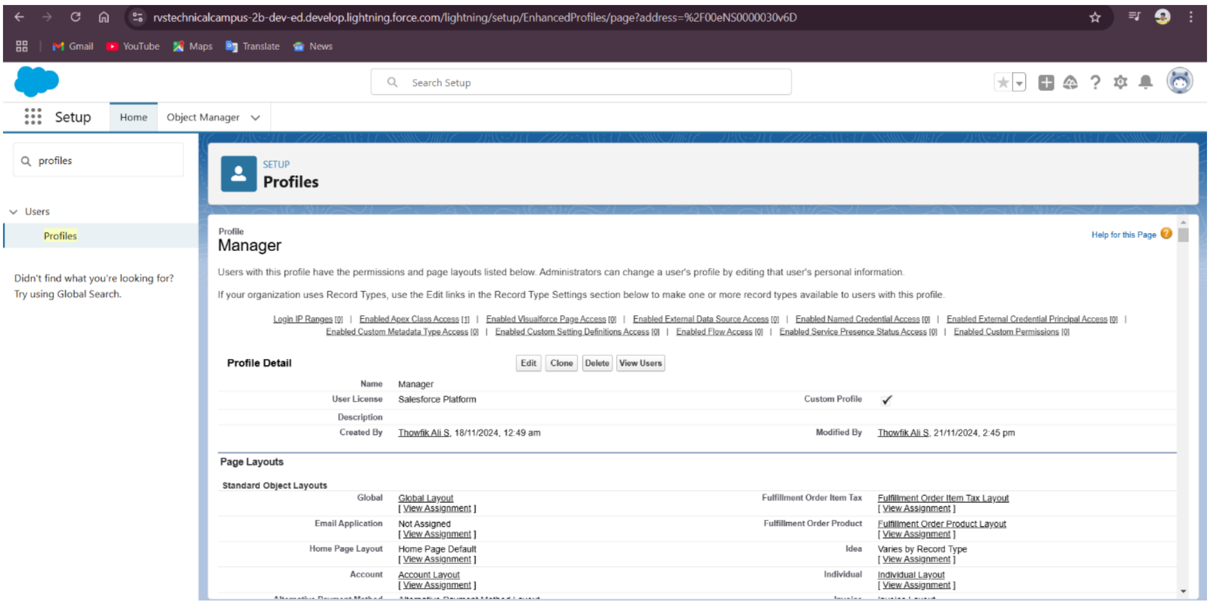
- **Customer** – Clone the Salesforce Platform User profile, name it “Customer”, adjust custom app settings to include only Property Details, remove all standard object permission, and set read and view all permission for the Property object.

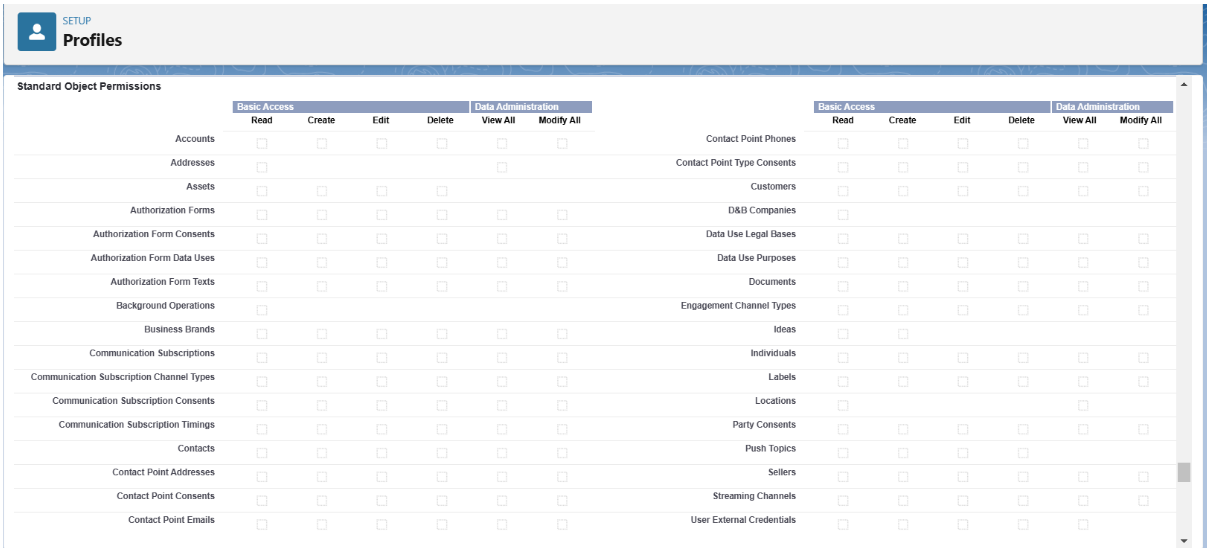






- **Manager –** Clone the Salesforce Platform User profile, name it "Manager", then ensure only "Property Details" is checked in Custom App Settings, remove all Standard Object Permission, Uncheck all Custom Object Permission, and enable "Modify All" for "Property" and "Customer".





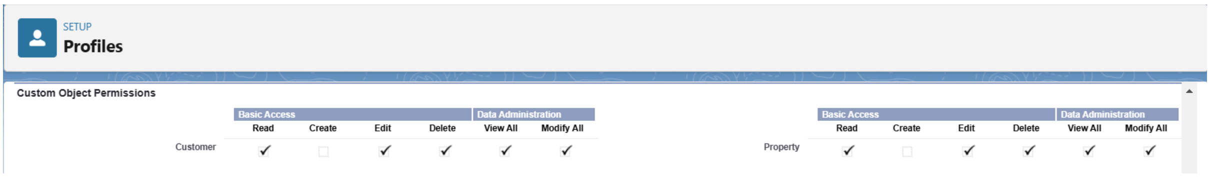
SETUP

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	☐	☐	☐	☐	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
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	☐	☐	☐	☐	☐	



SETUP

Profiles

Custom Object Permissions

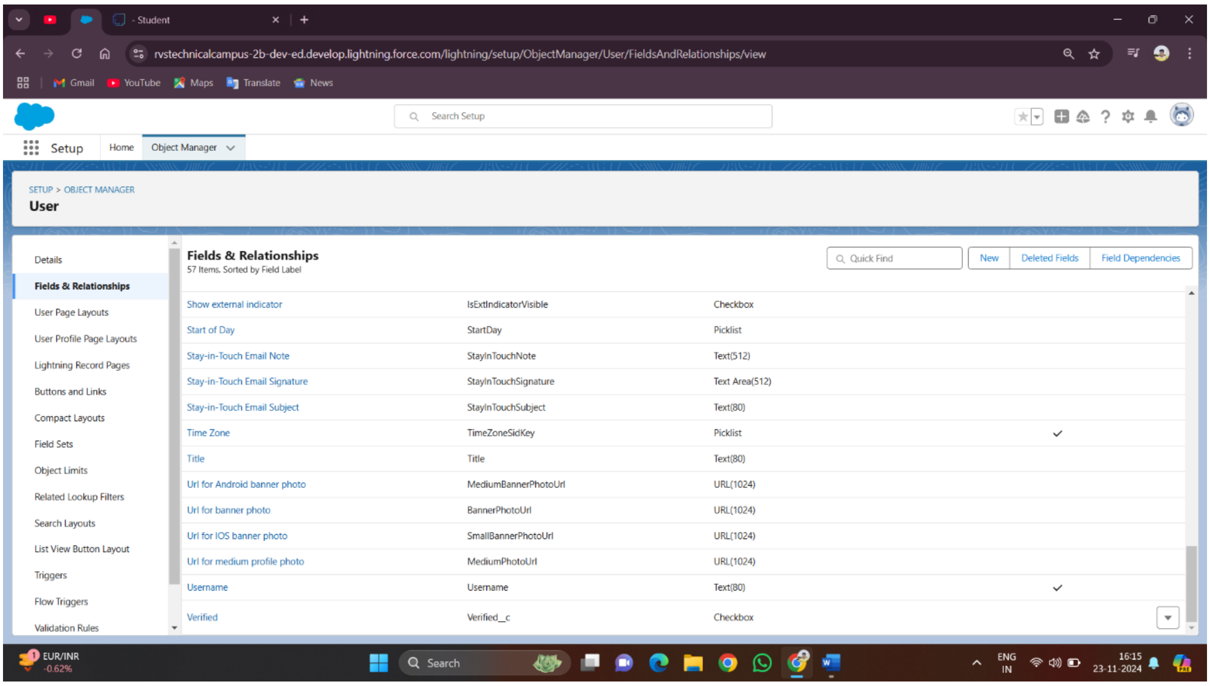
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customer	✓	☐	✓	✓	✓	✓
Property	✓	☐	✓	✓	✓	✓

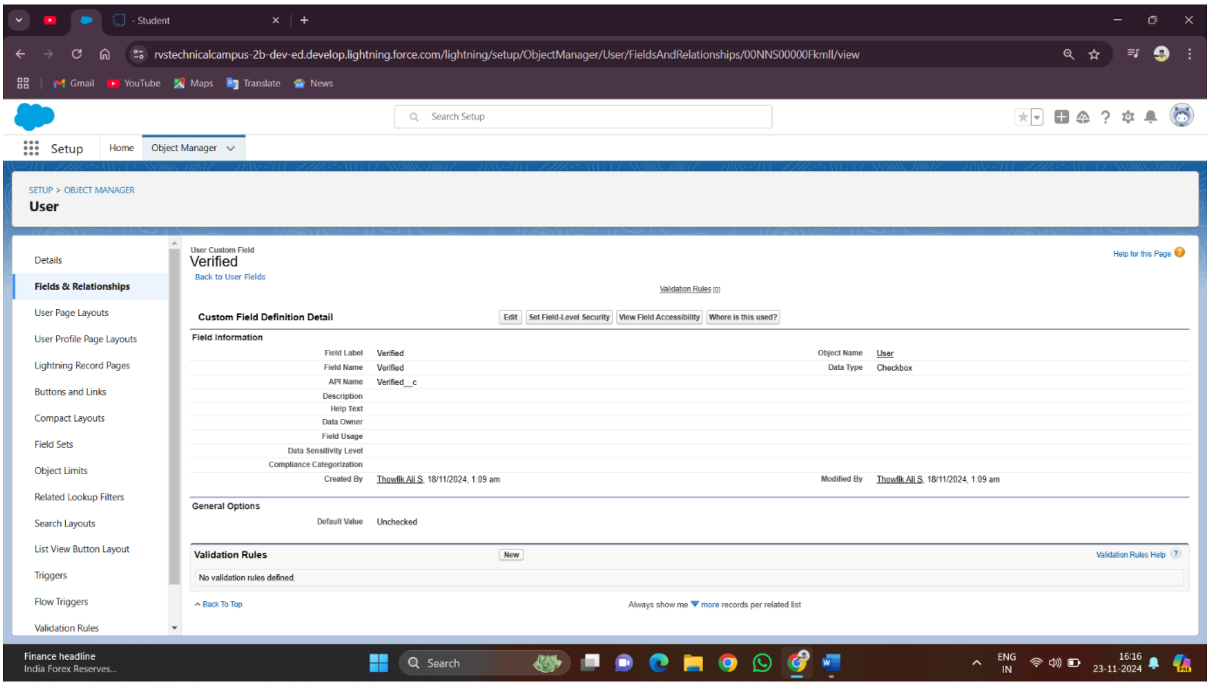
Task 7 : Create a Check Box field on user.13

Create Field on the User as per the business requirement.

Activity : 1

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



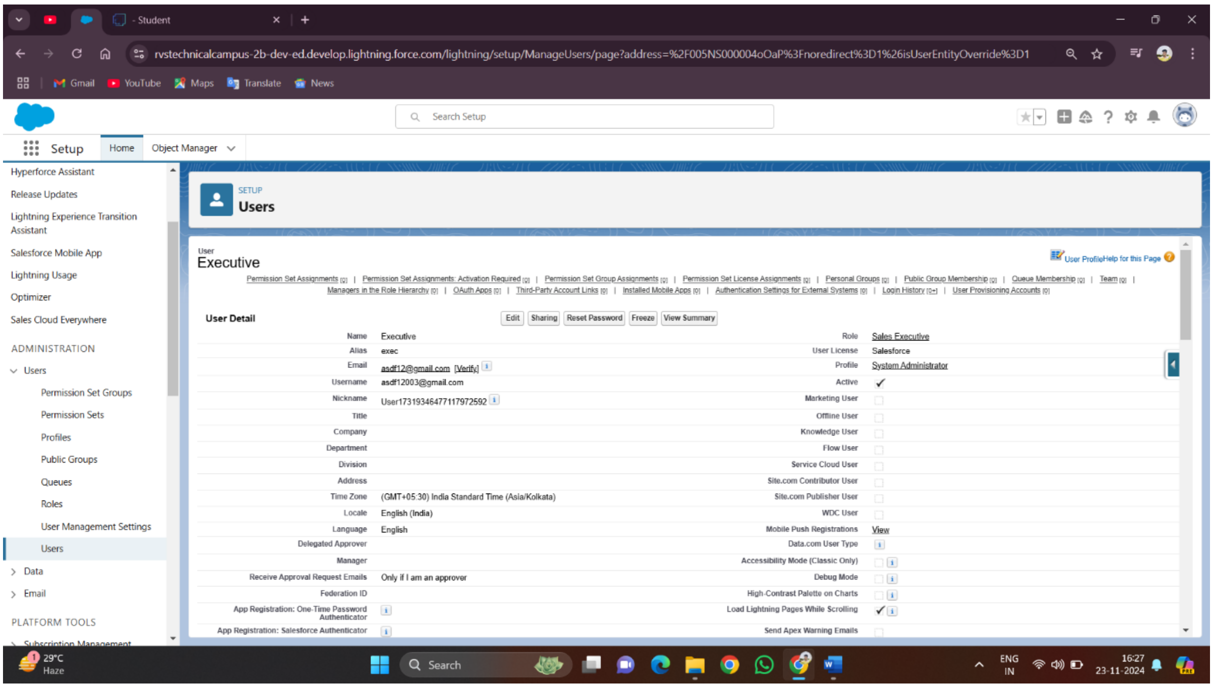


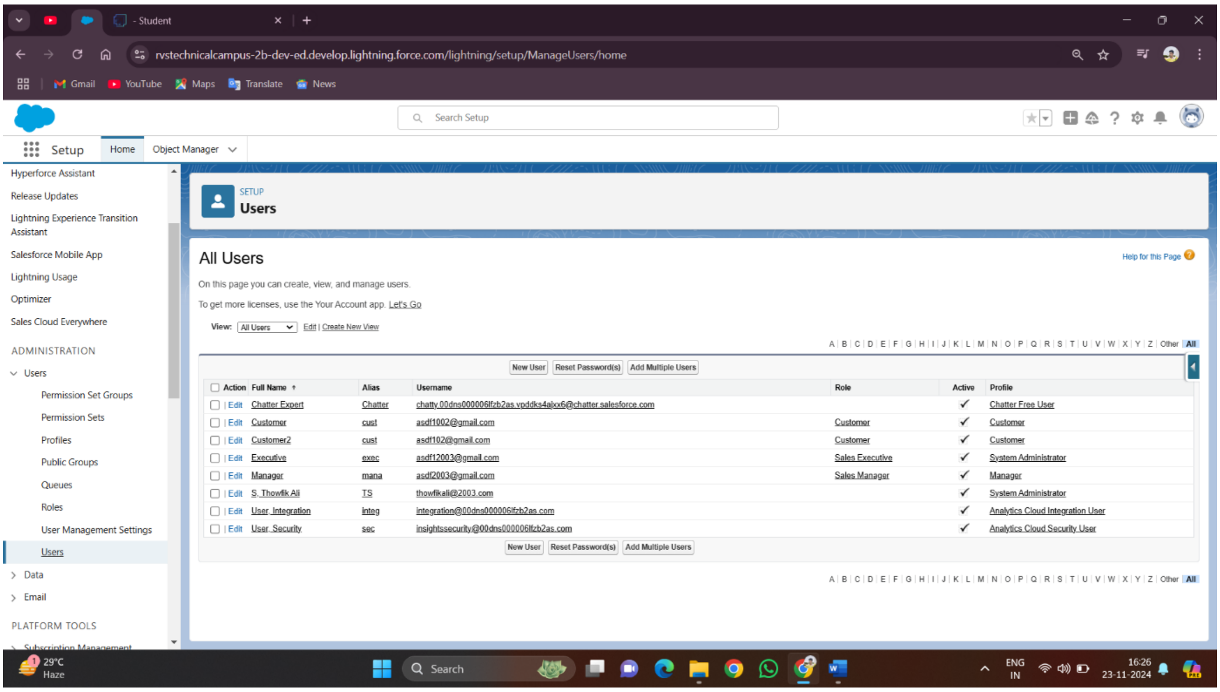
Task 8 : Create Users.

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

User:1

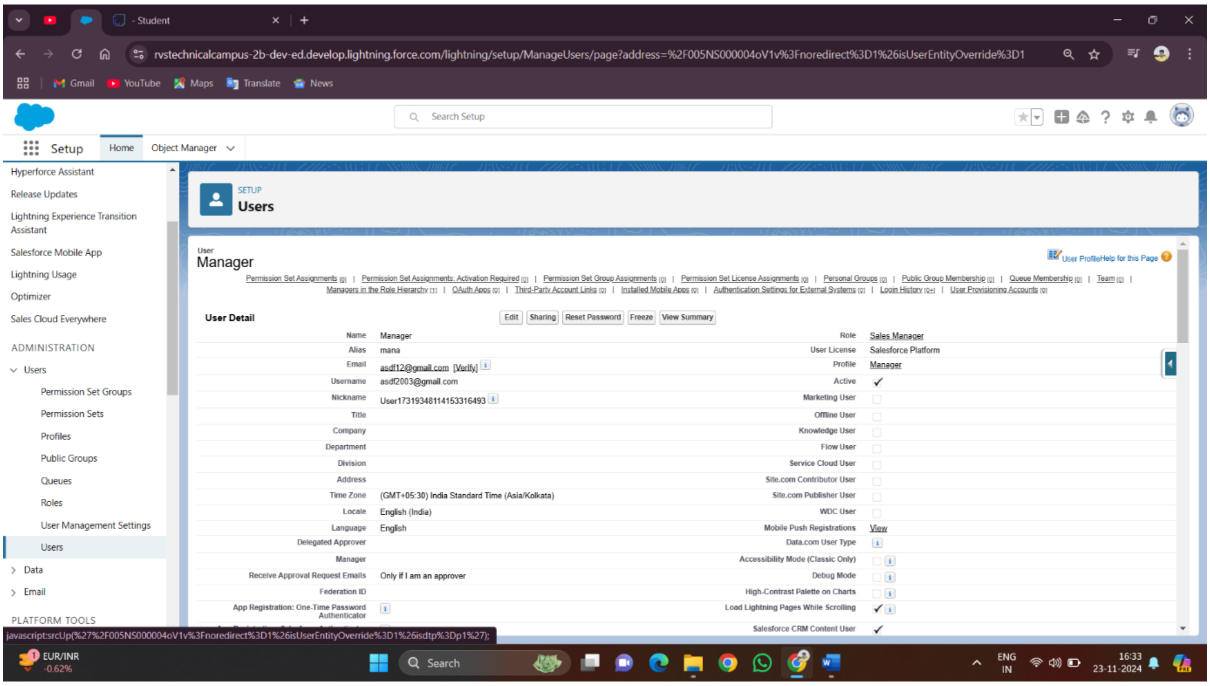
In setup navigate to Administration > Users > New User, fill in the Last Name as “Executive”, set the Role to “Sales Executive”, select the License as “Salesforce Platform”, choose the Profile as “System Administrator”, and save.





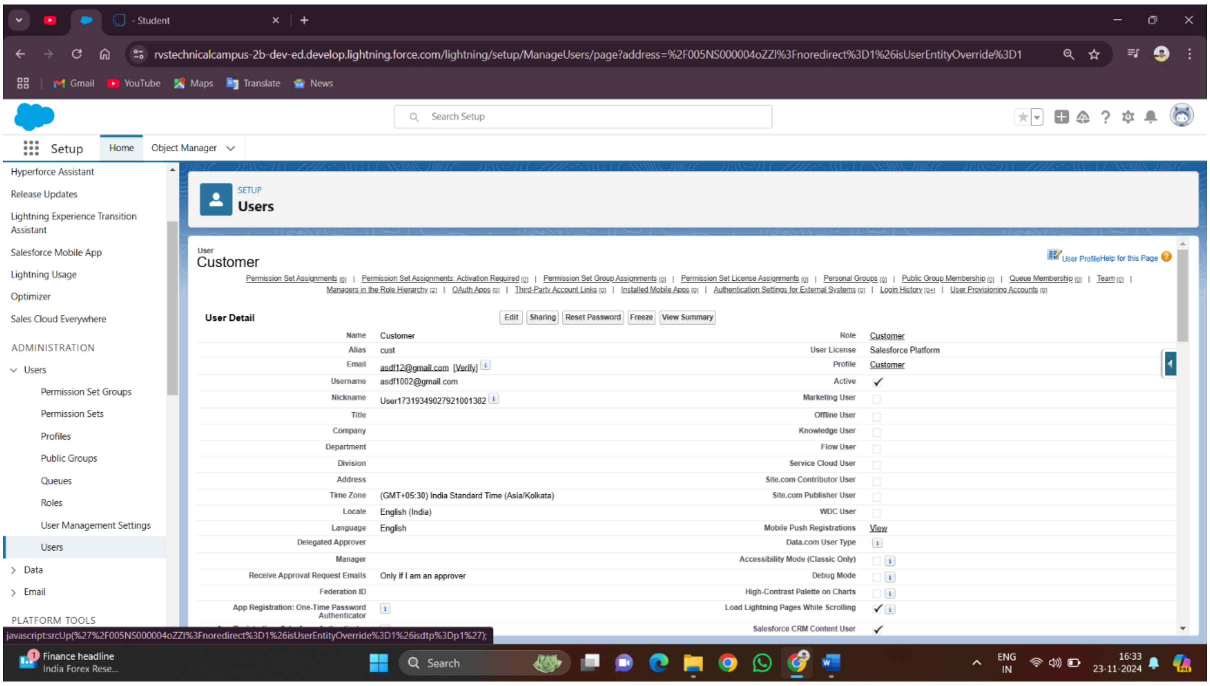
User:2

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.



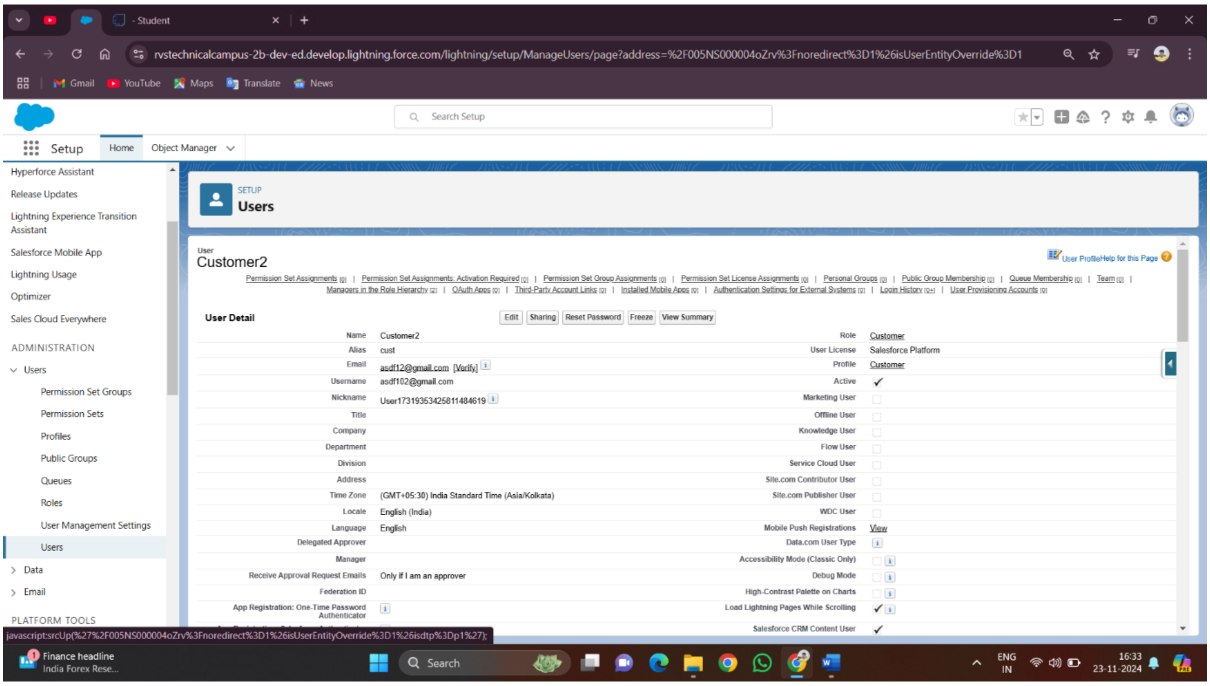
User:3

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.



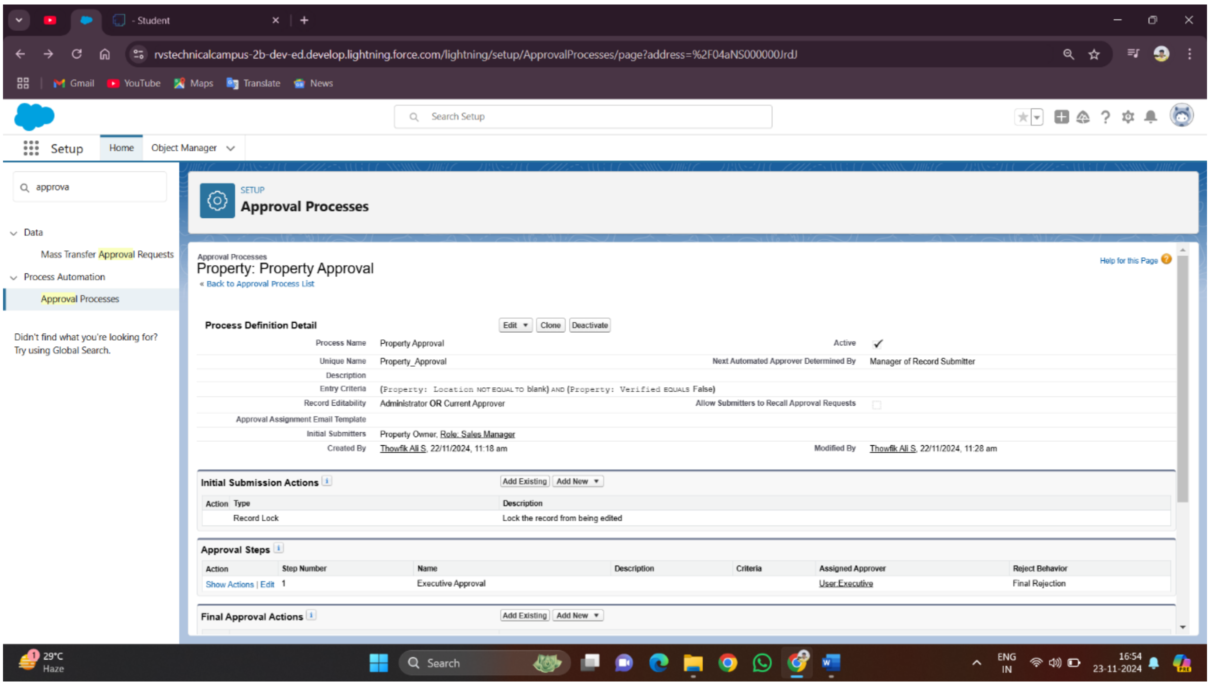
User:4

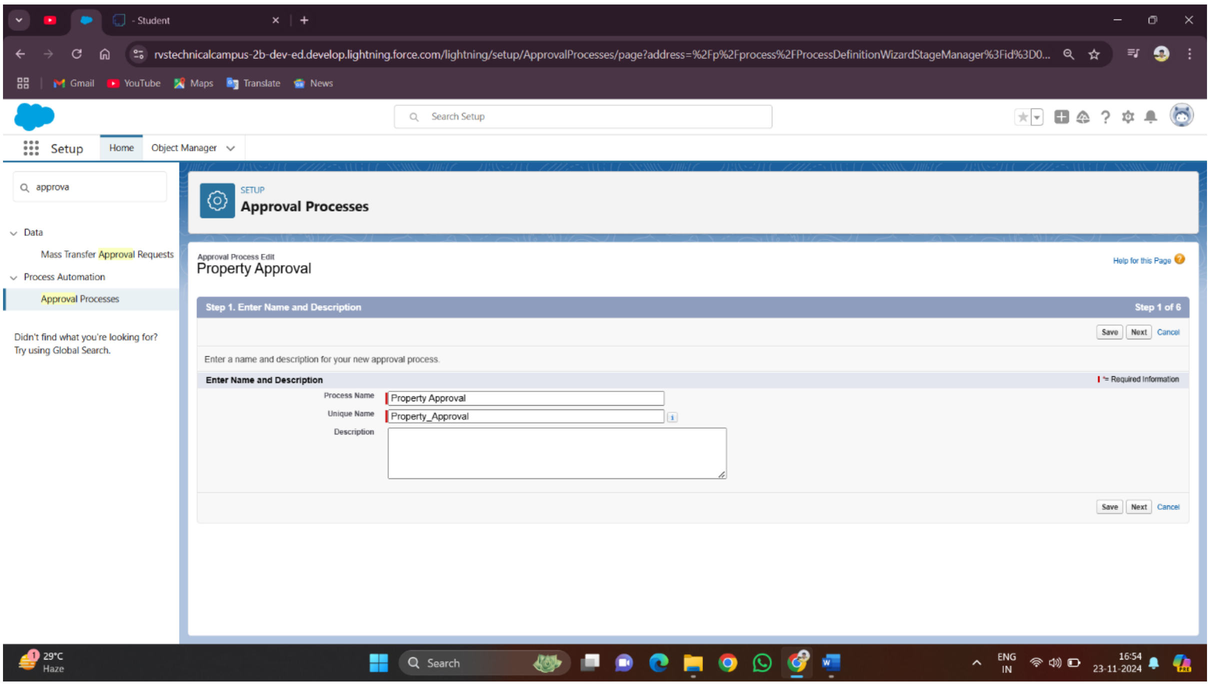
In setup navigate to Administration > Users > New User, fill in the Last Name as “Customer 2”, set the Role to “Customer”, select the License as “Salesforce Platform”, choose the Profile as “Customer”, ensure the “Verified” check box is checked, and save.

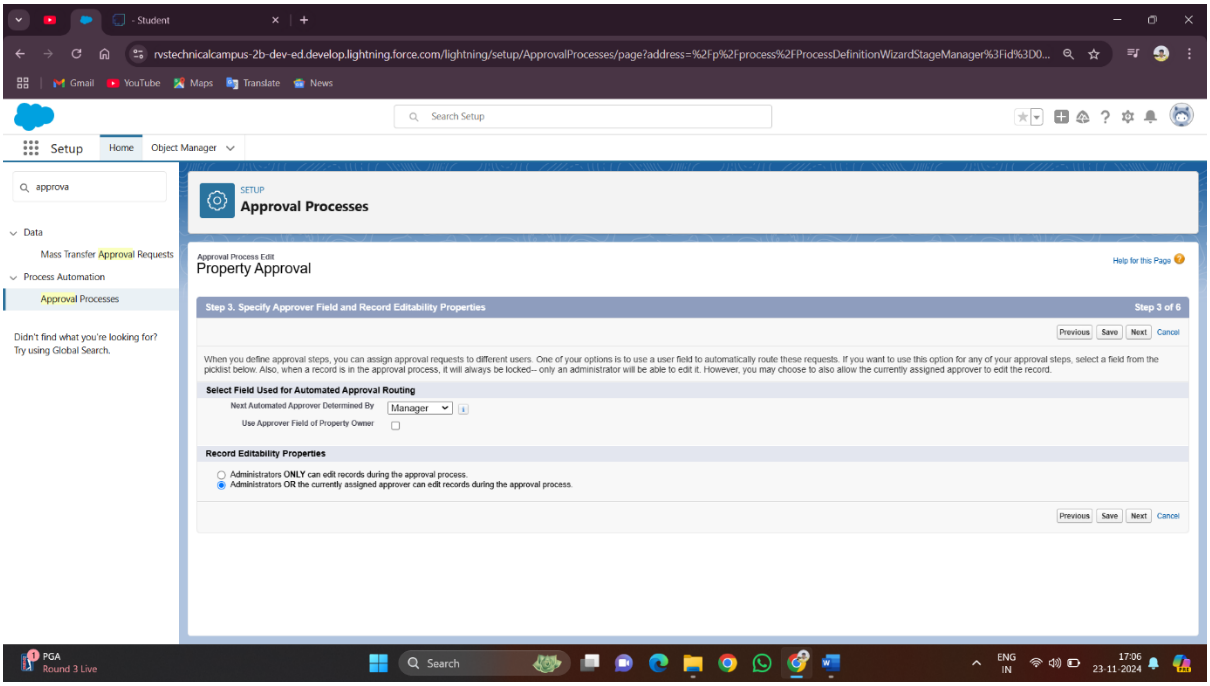


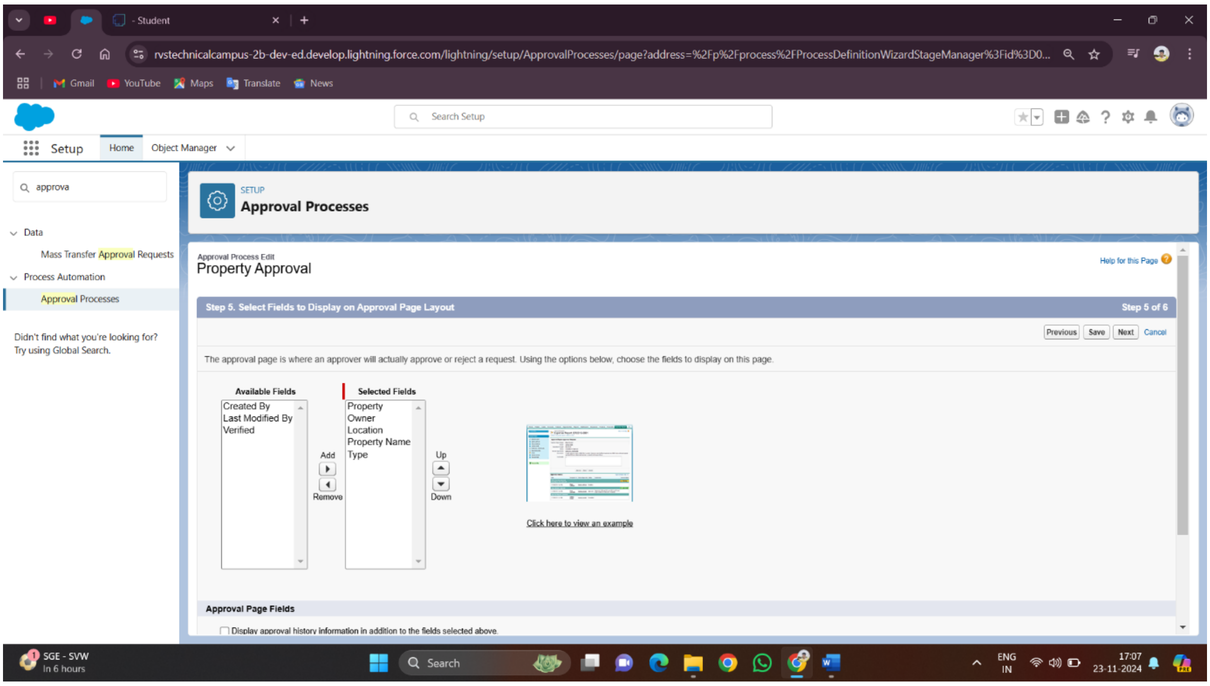
Task 9 : Create an Approval Process for Property Object.

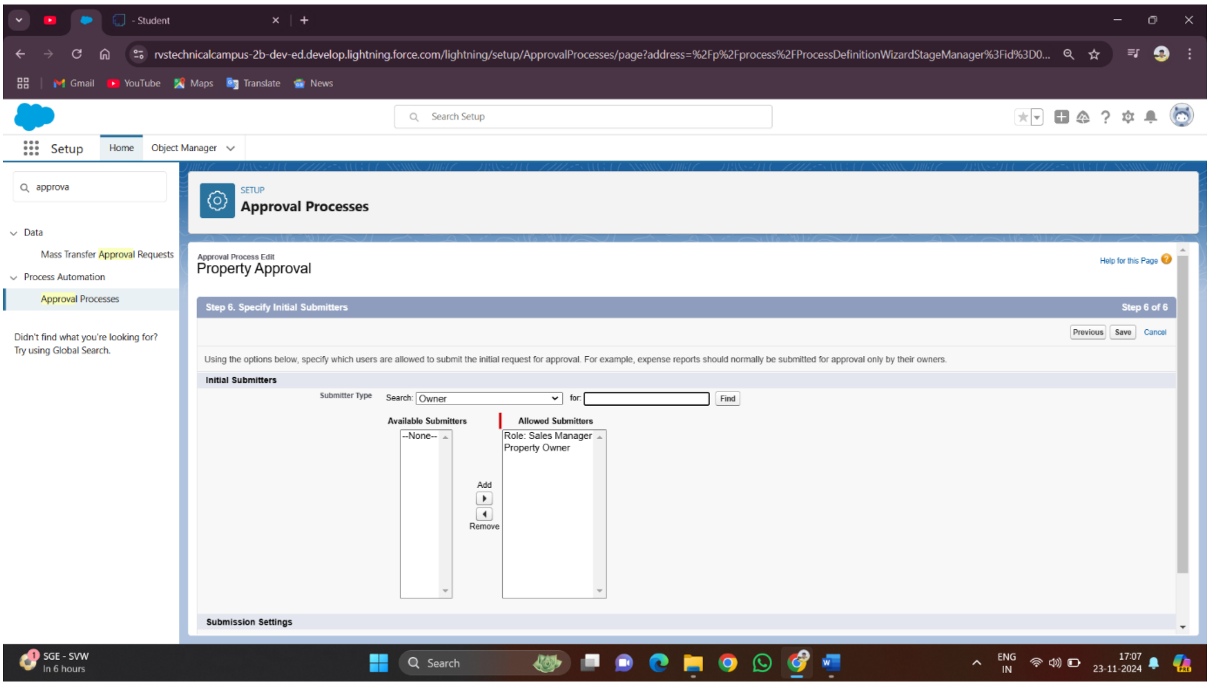
In Setup navigate to Process Automation > Approval Process, create a "Property Approval" process with criteria "Location is not equal to blank" and "Verified false", set the next automated approver to "Manager", enable record editability for administrators or current approvers, display Property, Owner,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

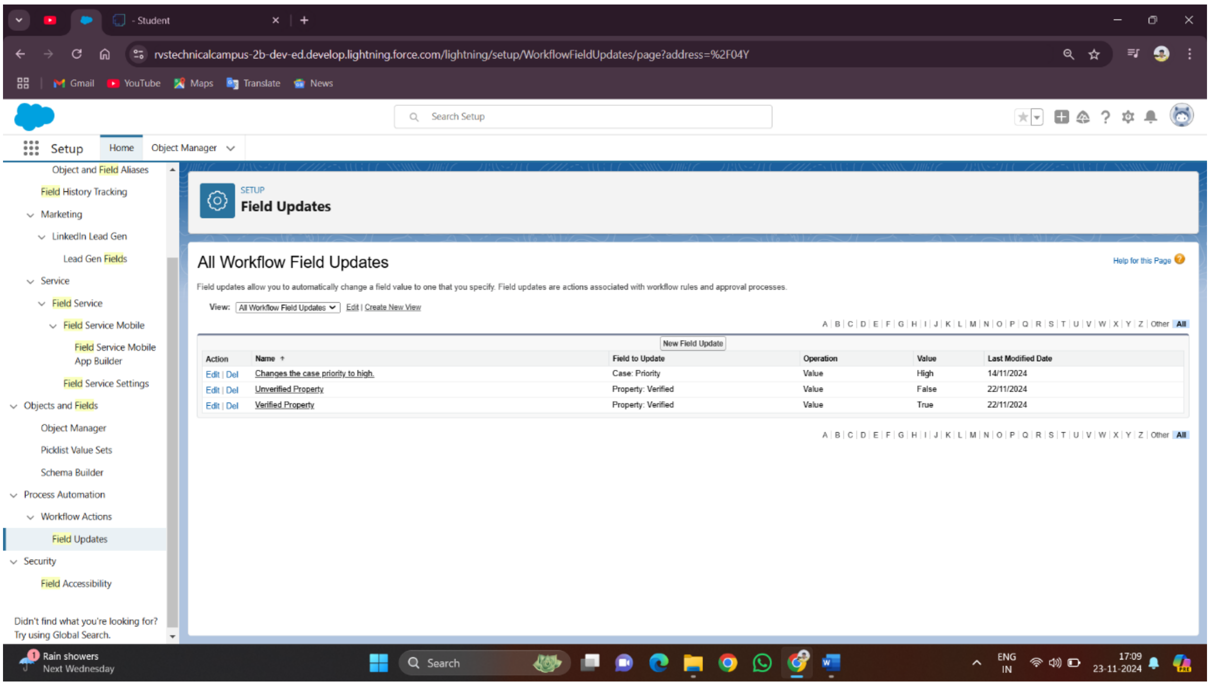





Setup
Approval Processes
Approval Process Edit
Property Approval
Step 3. Specify Approver Field and Record Editability Properties
Step 3 of 6
Select Field Used for Automated Approval Routing
Next Automated Approver Determined By
Manager
Use Approver Field of Property Owner
Record Editability Properties
Administrators ONLY can edit records during the approval process.
Administrators OR the currently assigned approver can edit records during the approval process.
Previous
Save
Next
Cancel


Setup
Approval Processes
Approval Process Edit
Property Approval
Step 5. Select Fields to Display on Approval Page Layout
Step 5 of 6
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
Verified
Selected Fields
Property
Owner
Location
Property Name
Type
Add
Remove
Up
Down
Click here to view an example
Approval Page Fields
Display approval history information in addition to the fields selected above.


rvstechnicalcampus-2b-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2Fp%2Fprocess%2FProcessDefinitionWizardStageManager%3Fid%3D0...
Setup
Home
Object Manager
SETUP
Approval Processes
Approval Process Edit
Property Approval
Step 6. Specify Initial Submitters
Step 6 of 6
Previous
Save
Cancel
Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.
Initial Submitters
Submitter Type
Search: Owner
for:
Find
Available Submitters
--None--
Allowed Submitters
Role: Sales Manager
Property Owner
Add
Remove
Submission Settings

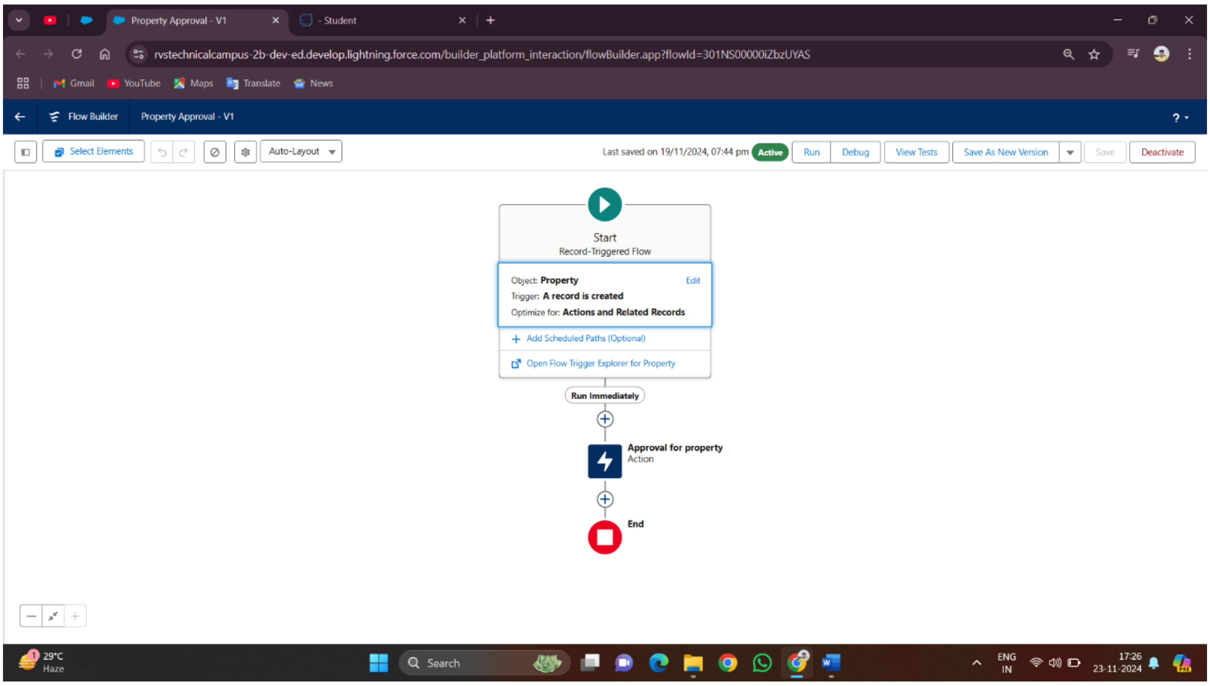

rvstechnicalcampus-2b-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowFieldUpdates/page?address=%2F04Y
Setup
Home
Object Manager
SETUP
Field Updates
All Workflow Field Updates
Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.
View: All Workflow Field Updates
Edit | Create New View
New Field Update
Action
Name
Field to Update
Operation
Value
Last Modified Date
Edit | Del
Changes the case priority to high.
Case: Priority
Value
High
14/11/2024
Edit | Del
Unverified Property
Property: Verified
Value
False
22/11/2024
Edit | Del
Verified Property
Property: Verified
Value
True
22/11/2024

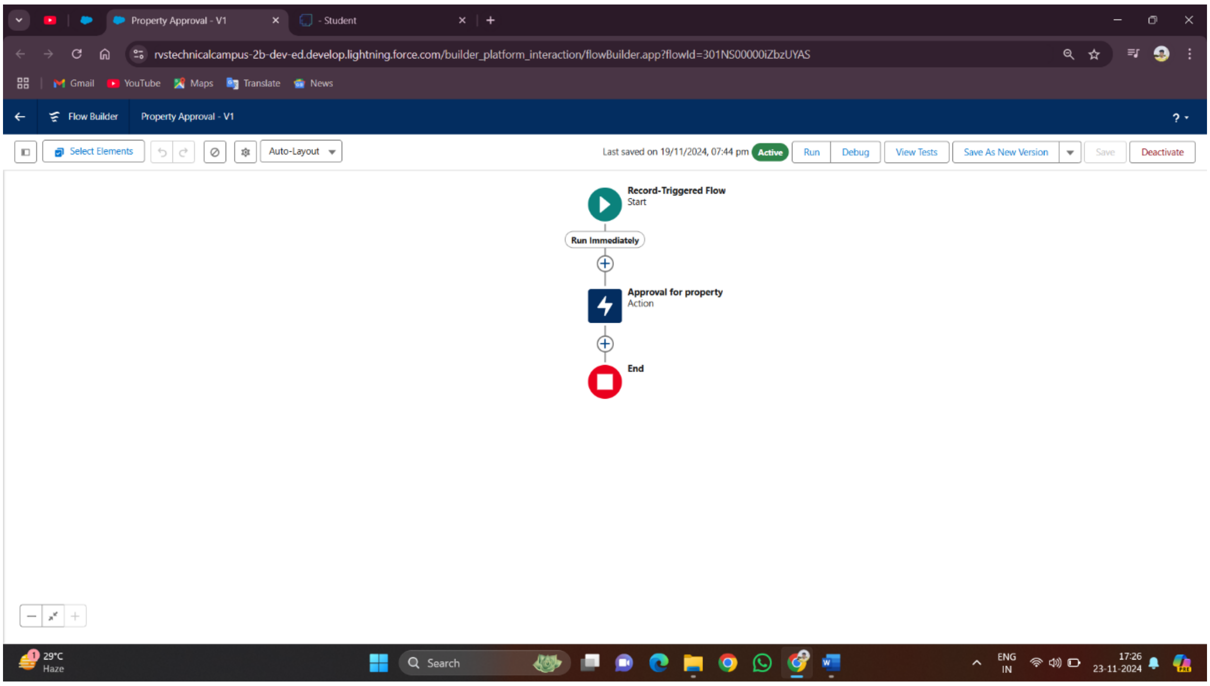
Task 10 : Create a Record trigger flow to submit the Approval Process Automatically.

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 lable "Approval for property' and Record ID as {!$Record.Id}, save the flow with the lable "Property Approval", and activate.



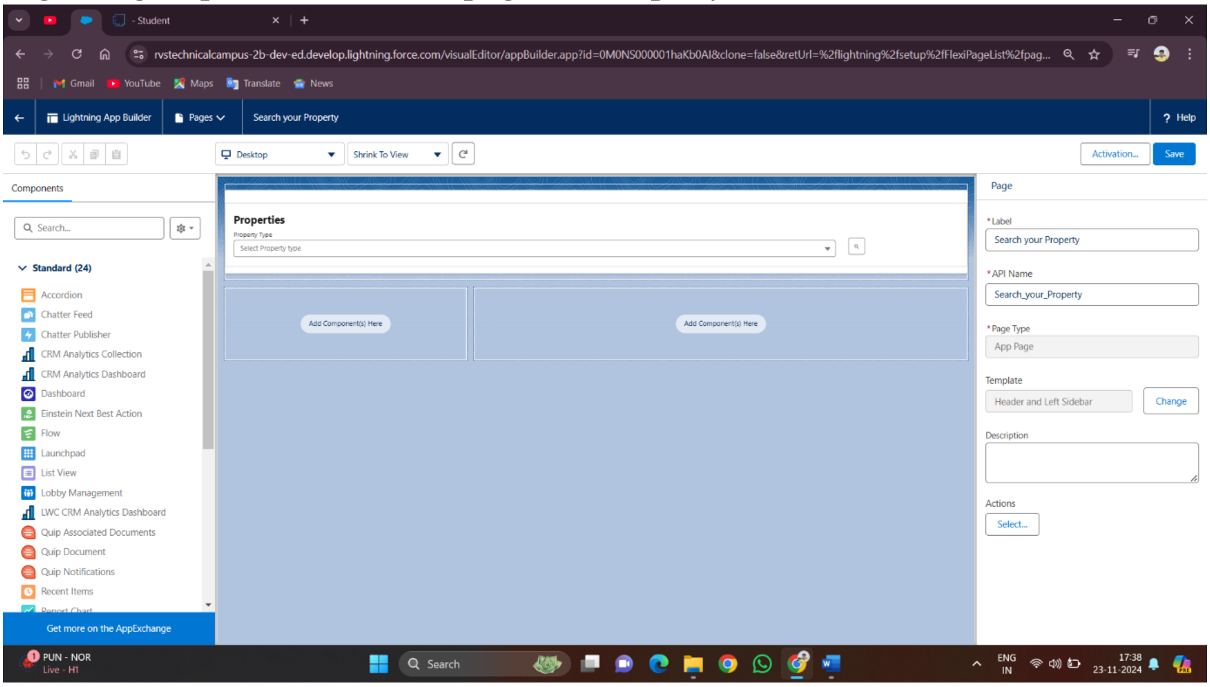


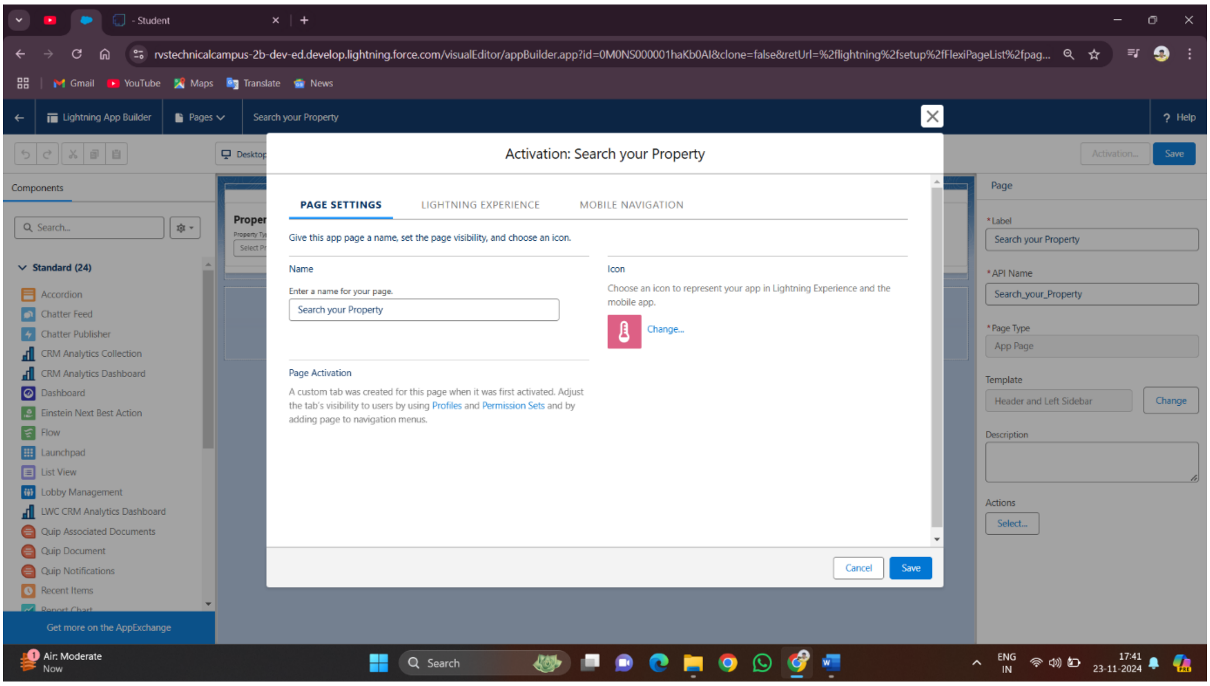
Task 11 : Create an App Page.

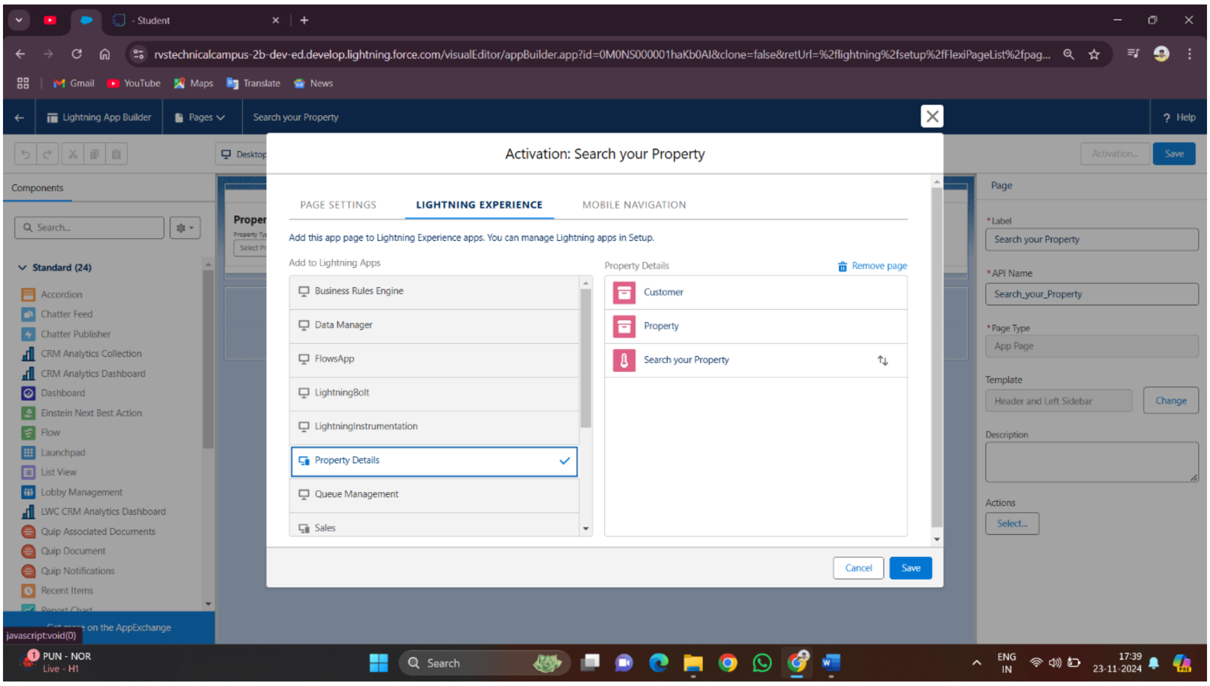
Create an App Page on the Property details Object named as “Search Your Property”.

Activity :1

In Setup navigate to Lightning App Builder, create a new App page with the lable “Search your Property”, choose “Header and Left Sidebar” layout, save and activate the page, select “Activate for all user” from page settings, and in Lightning Experience, add the page to “Property Details”, then save.





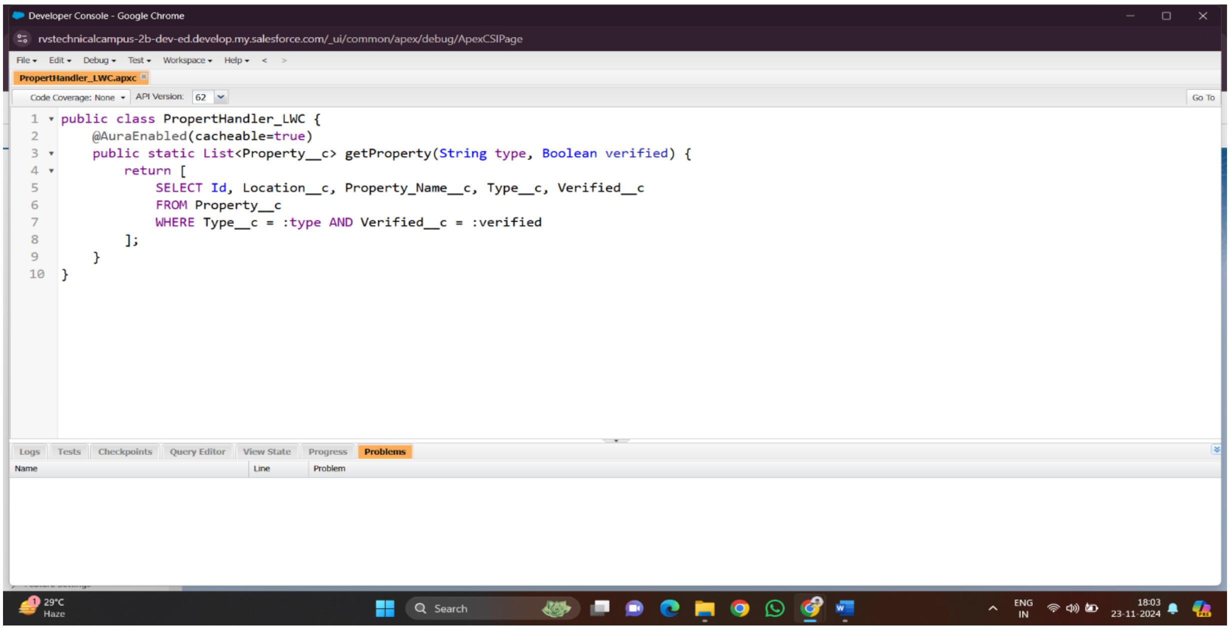


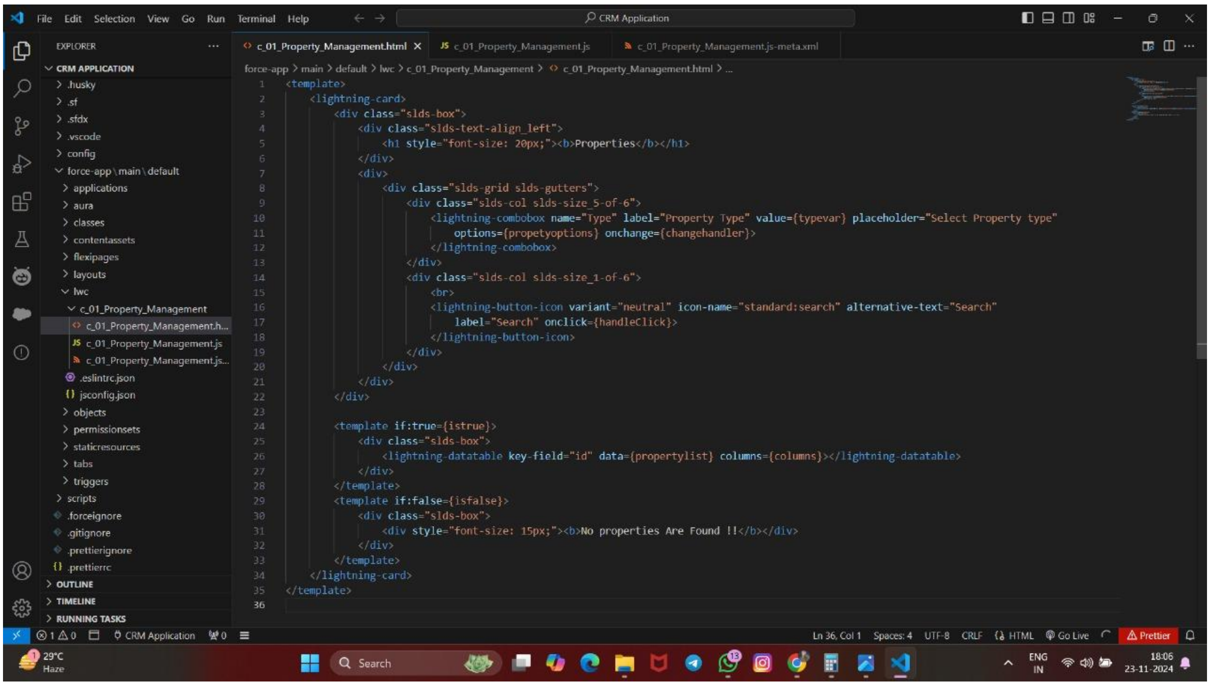
Task 12 : Create a LWC Component.

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”.

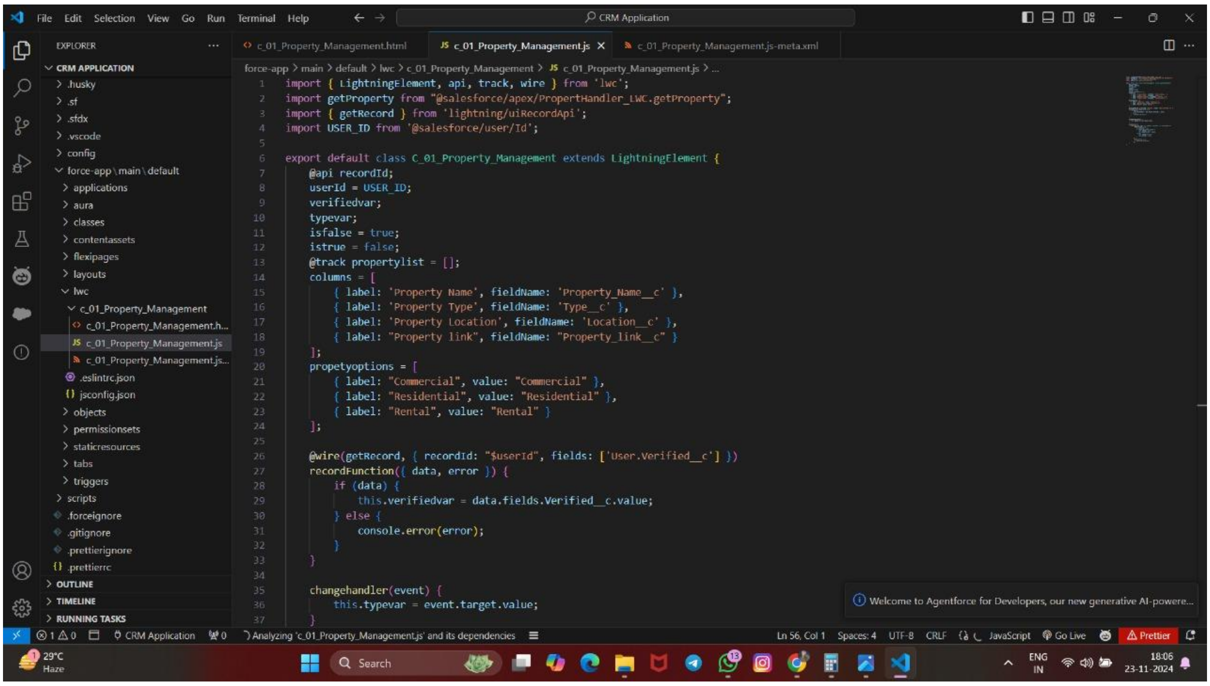
Activity : 1

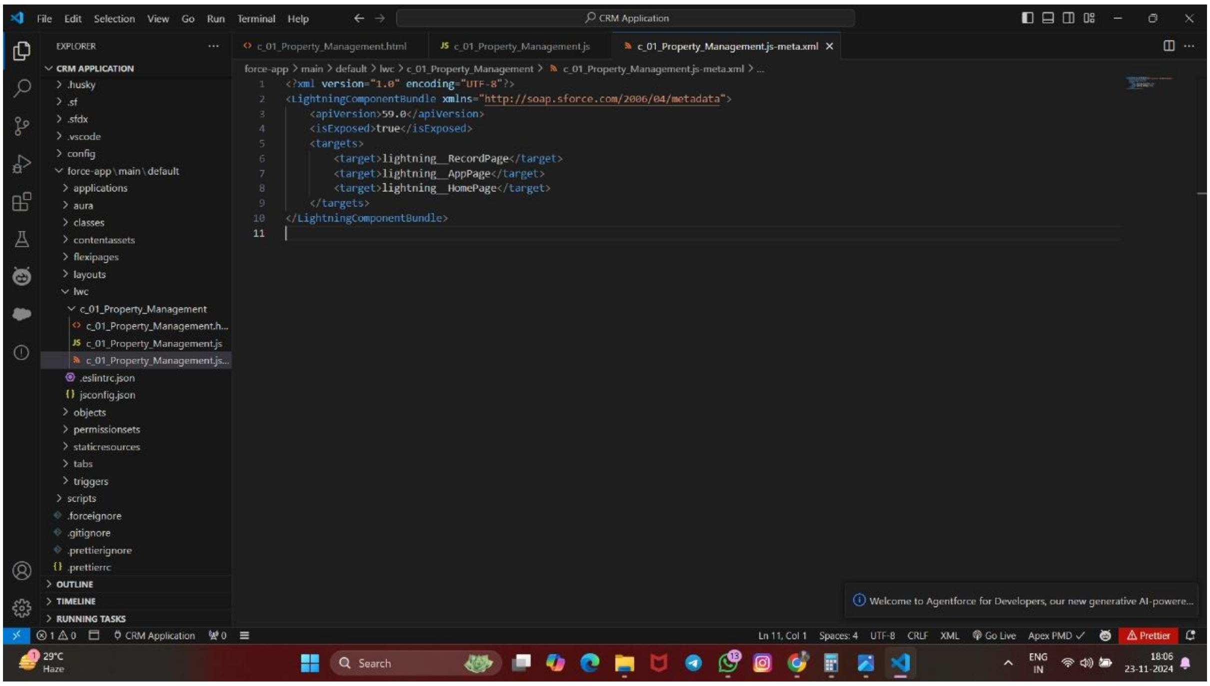
Create an Apex class named “PropertyHandler_LWC” and make it Aura enabled, then in VScode, authorize your org, create a Lightning Web Component, write the provided code.

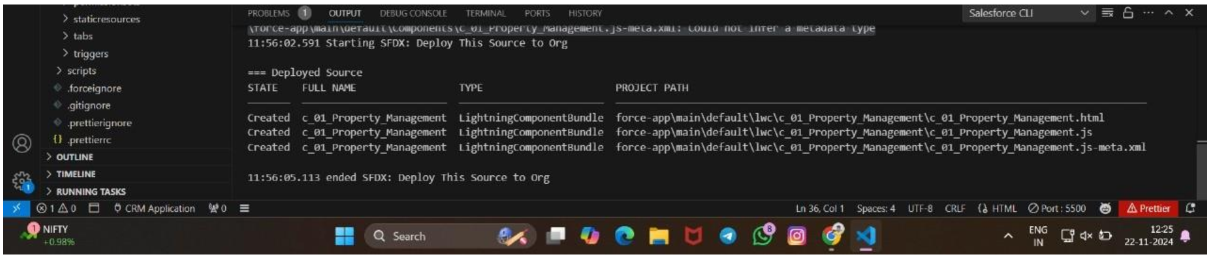



CRM Application
c_01_Property_Management.html
c_01_Property_Management.js
c_01_Property_Management.js-meta.xml
force-app > main > default > lwc > c_01_Property_Management > c_01_Property_Management.html > ...
<template>
<lightning-card>
<div class="slds-box">
<div class="slds-text-align_left">
<h1 style="font-size: 20px;">Properties</h1>
</div>
<div>
<div class="slds-grid slds-gutters">
<div class="slds-col slds-size_5-of-6">
<lightning-combobox name="Type" label="Property Type" value={typevar} placeholder="Select Property type"
options={propetyoptions} onchange={changehandler}>
</lightning-combobox>
</div>
<div class="slds-col slds-size_1-of-6">

<lightning-button-icon variant="neutral" icon-name="standard:search" alternative-text="Search"
label="Search" onclick={handleClick}>
</lightning-button-icon>
</div>
</div>
</div>
</div>
<template if:true={istrue}>
<div class="slds-box">
<lightning-datatable key-field="id" data={propertylist} columns={columns}></lightning-datatable>
</div>
</template>
<template if:false={isfalse}>
<div class="slds-box">
<div style="font-size: 15px;">No properties Are Found !!</div>
</div>
</template>
</lightning-card>
</template>
Ln 36, Col 1 Spaces: 4 UTF-8 CRLF HTML Go Live


CRM Application
c_01_Property_Management.html
c_01_Property_Management.js
c_01_Property_Management.js-meta.xml
force-app > main > default > lwc > c_01_Property_Management > c_01_Property_Management.js > ...
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 }) {
if (data) {
this.verifiedvar = data.fields.Verified__c.value;
} else {
console.error(error);
}
}
changehandler(event) {
this.typevar = event.target.value;
}
Welcome to Agentforce for Developers, our new generative AI-powere...
Analyzing 'c_01_Property_Management.js' and its dependencies
Ln 56, Col 1 Spaces: 4 UTF-8 CRLF JavaScript Go Live



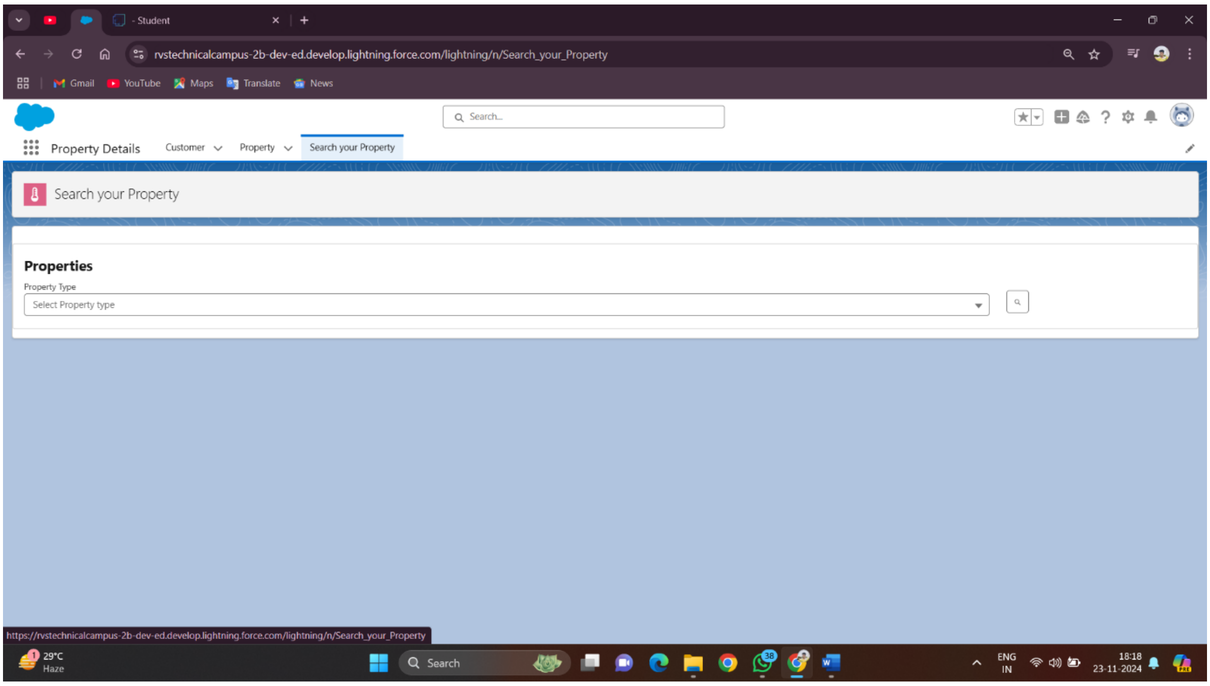


Task 13 : Drag this Component to your App Page.

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.


- Student
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Gmail
YouTube
Maps
Translate
News
Search...
Property Details
Customer
Property
Search your Property
Search your Property
Properties
Property Type
Select Property type
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29°C
Haze
Search
ENG
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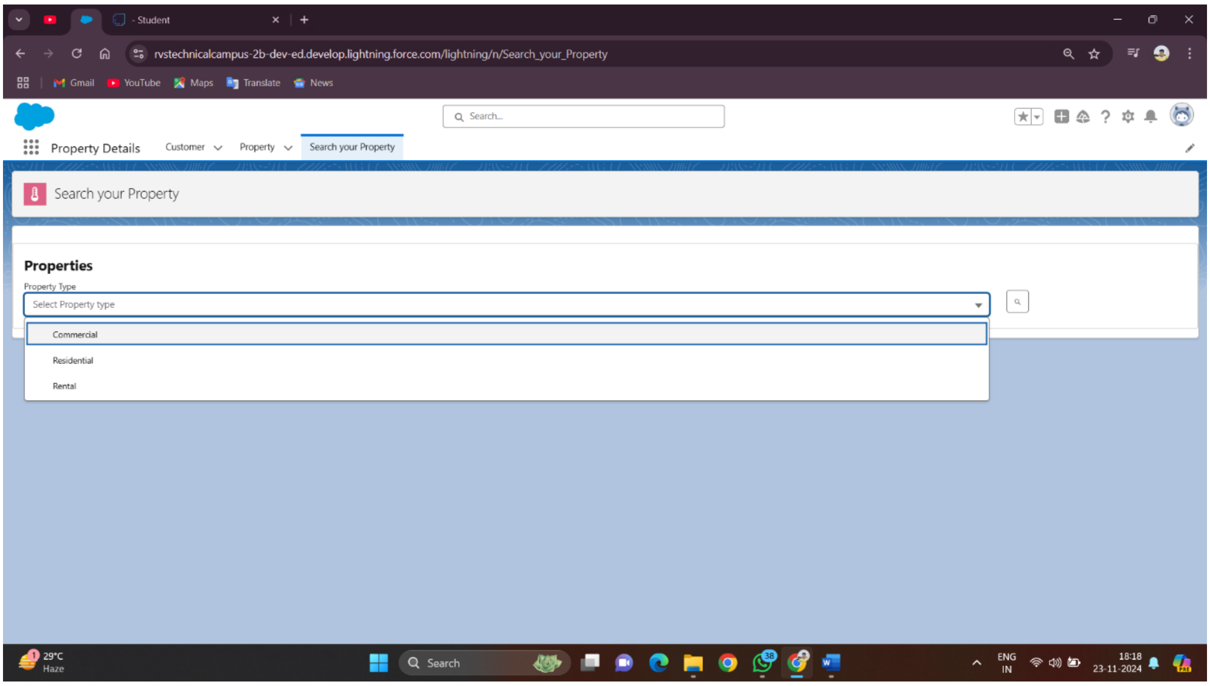
18:18
23-11-2024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rvstechnicalcampus-2b-dev-ed.develop.lightning.force.com/lightning/n/Search_your_Property
Gmail
YouTube
Maps
Translate
News
Search...
Property Details
Customer
Property
Search your Property
Search your Property
Properties
Property Type
Select Property type
Commercial
Residential
Rental
29°C
Haze
Search
ENG
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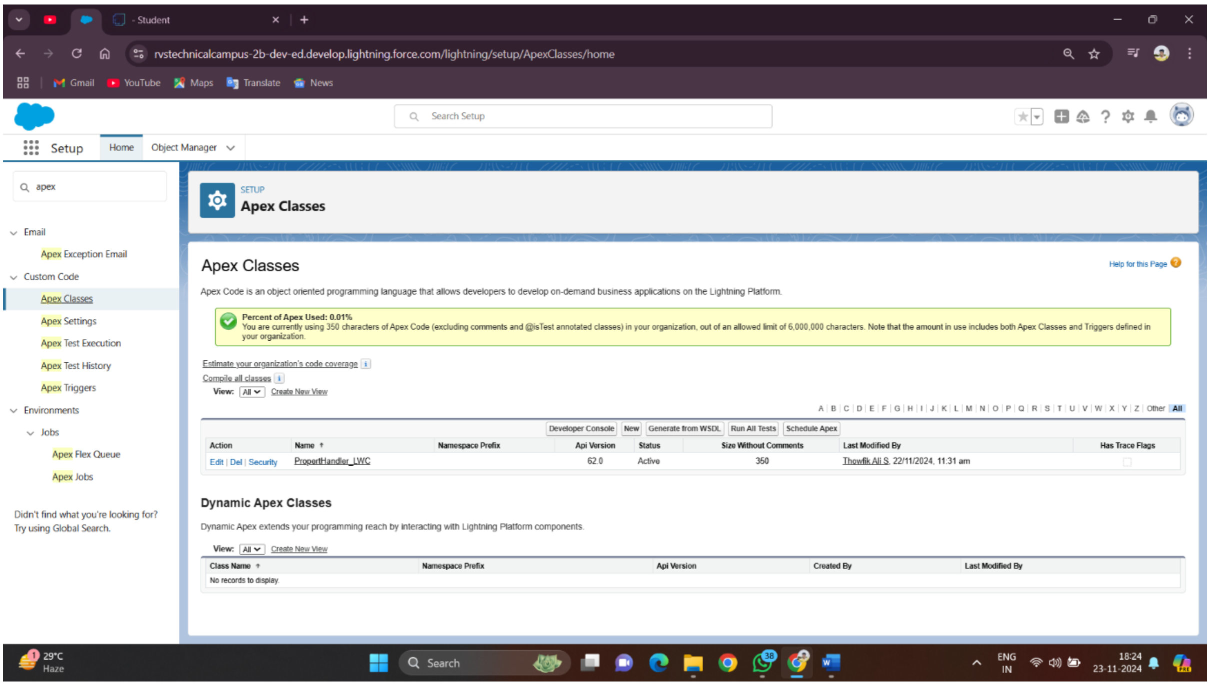
18:18
23-11-2024

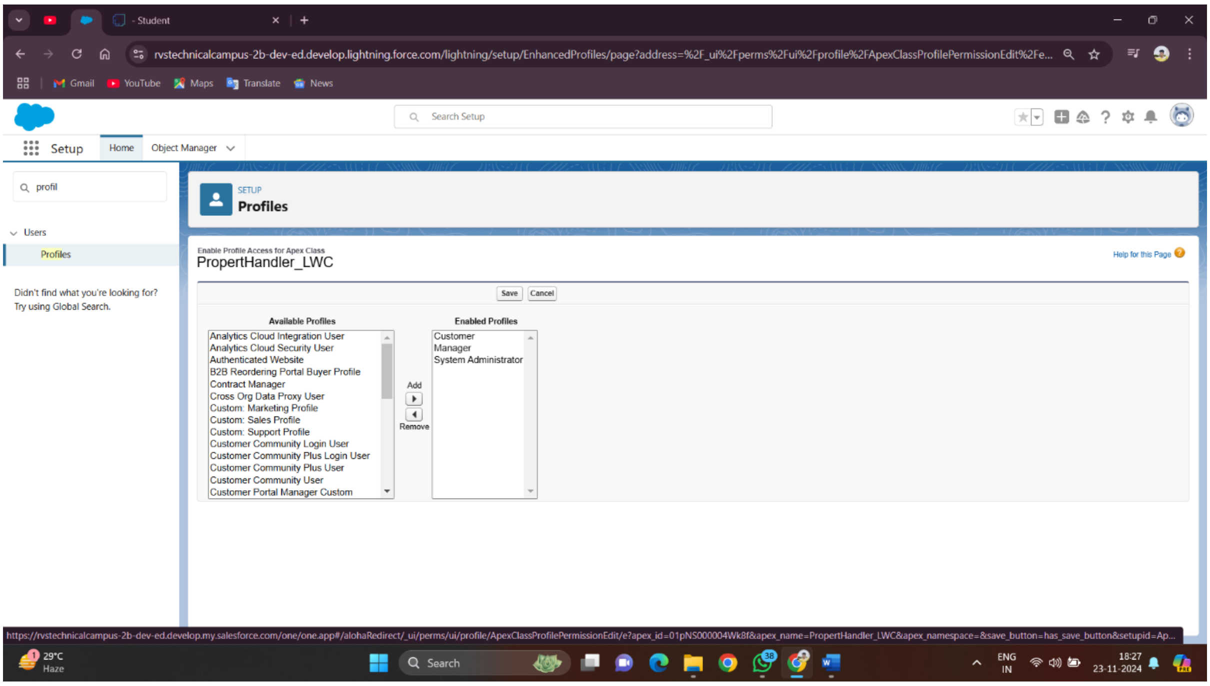
Task 14 : Give Access of Apex Classes to Profiles.

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.





THANK YOU !!!