

# **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.

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## 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>



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  
 COMMERCIAL  
 RENTAL

Budget Amount \*

e.g. 23

Address

Street Address

Street Address Line 2

City

State / Province

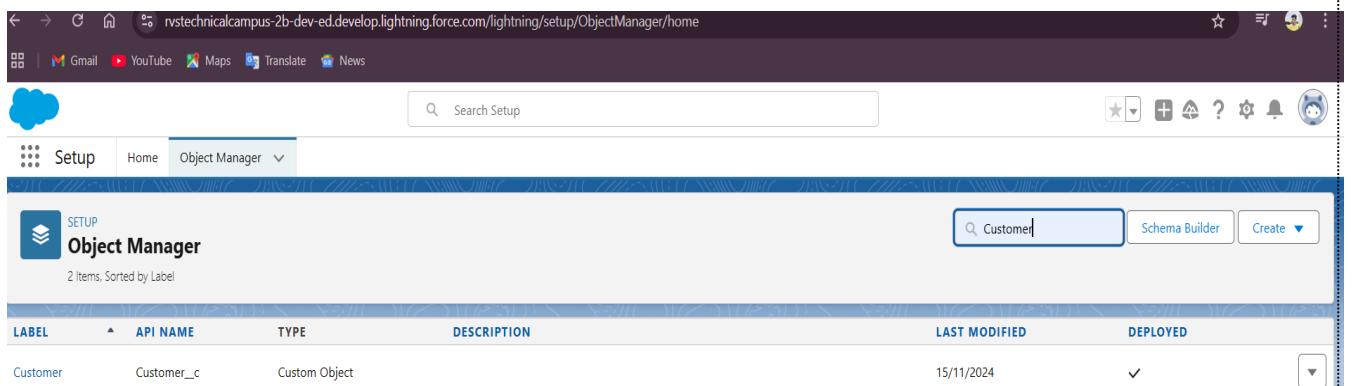
Postal / Zip Code

**Submit**

## Task 2 : Create Objects from Spreadsheet.

Directly Creating Objects from Spreadsheet in Salesforce.

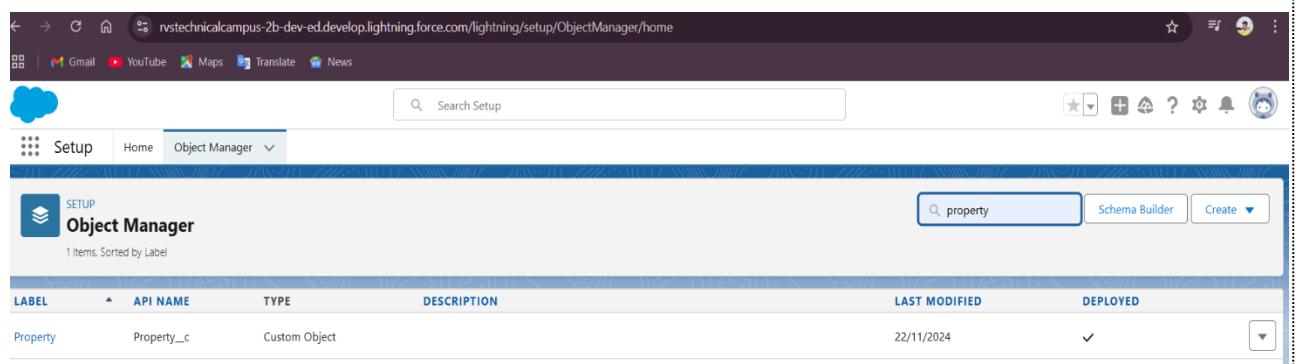
- Create Customer object



The screenshot shows the Salesforce Object Manager page. The URL in the browser is [rvstechicalcampus-2b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home](https://rvstechicalcampus-2b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home). The page title is "Object Manager". A search bar at the top right contains the text "Customer". Below the search bar, there are buttons for "Schema Builder" and "Create". The main table displays one item:

Label	API Name	Type	Description	Last Modified	Deployed
Customer	Customer__c	Custom Object		15/11/2024	✓

- Create Property object



The screenshot shows the Salesforce Object Manager page. The URL in the browser is [rvstechicalcampus-2b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home](https://rvstechicalcampus-2b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home). The page title is "Object Manager". A search bar at the top right contains the text "property". Below the search bar, there are buttons for "Schema Builder" and "Create". The main table displays one item:

Label	API Name	Type	Description	Last Modified	Deployed
Property	Property__c	Custom Object		22/11/2024	✓

## 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.

The screenshot shows the Jotform Form Builder interface for a form titled "Dreams World". The "SETTINGS" tab is selected. On the left sidebar, under "INTEGRATIONS", the "Salesforce" icon is highlighted with a green checkmark. The main area displays several integration options:

- Salesforce**: Send new leads, contacts, or accounts to your sales CRM.
- Square**: Collect Square payments directly through your forms.
- Google Sheets**: Instantly populate your spreadsheets with form data.
- PayPal Personal**: Collect payments through your online forms.
- Google Drive**: Sync file uploads and form submissions to Google Drive.
- Twilio**: Send confirmation codes via SMS message.

The status bar at the bottom shows "85°F Haze" and the date "22-11-2024".

The screenshot shows the Jotform Form Builder interface for the same "Dreams World" form. The "SETTINGS" tab is selected. Under "INTEGRATIONS", the "SALESFORCE" section is expanded. It shows a single action: "Create or update a record" for the "Customer" object. The status bar at the bottom shows "85°F Haze" and the date "22-11-2024".

## Task 4 : Create Roles- Create Roles as per business requirement.

### Sales Executive Role:

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

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The sidebar on the left shows navigation categories like Users, Feature Settings, Sales, Service, and Case Teams. The main content area displays a hierarchical tree of roles. The 'Sales' category is expanded, showing its sub-roles: Contact Roles on Contracts, Contact Roles on Opportunities, and Case Team Roles. The 'Sales' role itself is expanded, showing its sub-roles: VP\_Marketing, VP\_North\_American\_Sales, Director\_Channel\_Sales, Director\_Direct\_Sales, Sales\_Representative, and Sales\_Executive. The Sales\_Executive role is also expanded, showing its sub-roles: Sales\_Manager and Customer. Each role entry includes 'Edit', 'Del', and 'Assign' buttons.

#### - Sales Executive

The screenshot shows the detailed view of the 'Sales Executive' role. The 'Role Detail' section includes fields for 'Label' (set to 'Sales Executive'), 'Role Name' (set to 'Sales\_Executive'), and 'Sharing Groups' (set to 'Role, Role and Internal Subordinates'). Below this, the 'Opportunity Access' and 'Case Access' sections are visible. The 'Users in Sales Executive Role' section lists one user: 'asdt12003@gmail.com' (Full Name: 'Executive', Alias: 'exec', Username: 'asdt12003@gmail.com', Active status checked). A 'Help for this Page' link is also present.

## - Sales Manager

The screenshot shows the Salesforce Setup Roles page for the 'Sales Manager' role. The left sidebar shows navigation options like 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'Role Detail' for 'Sales Manager', which includes fields for Label (Sales Manager), This role reports to (Sales Executive), Modified By (Thowlik Ali S.), Opportunity Access, Case Access, Role Name (Sales\_Manager), and Role Name as displayed on reports. Below this is a table titled 'Users in Sales Manager Role' showing one user assigned: 'Manager' (Full Name: asdf2003@gmail.com, Alias: mana). A note at the bottom states: 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities'.

## - Customer

The screenshot shows the Salesforce Setup Roles page for the 'Customer' role. The left sidebar shows navigation options like 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'Role Detail' for 'Customer', which includes fields for Label (Customer), This role reports to (Sales Manager), Modified By (Thowlik Ali S.), Opportunity Access, Case Access, Role Name (Customer), and Role Name as displayed on reports. Below this is a table titled 'Users in Customer Role' showing two users assigned: 'Customer' (Full Name: asdf1002@gmail.com, Alias: cust) and 'Customer2' (Full Name: asdf102@gmail.com, Alias: cust). A note at the bottom states: 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities'.

## 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.

The screenshot shows the Salesforce Lightning App Builder interface. On the left, there's a sidebar with a search bar containing "lightning a" and a "User Interface" section with a "Lightning App Builder" button. The main area has a title "Lightning App Builder" with a setup icon. Below it, a message says: "The Lightning App Builder provides an easy to use graphical interface for creating custom Lightning pages for Salesforce Lightning Experience and mobile app. Lightning pages are built using Lightning components—compact, configurable, and reusable elements that you can drag and drop into regions of the page in the Lightning App Builder." A "View" dropdown is set to "All". A table titled "Lightning Pages" is shown, with one row visible:

Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit   Clone   Del	Search_your_Property	Search_your_Property			App Page	TS, 19/11/2024, 7:51 pm	TS, 22/11/2024, 11:59 am

## 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.

The screenshot shows the Salesforce Profiles page. On the left, there's a sidebar with a search bar containing "profiles" and a "Users" section with a "Profiles" button. The main area has a title "Profiles" with a setup icon. Below it, a profile named "Customer" is shown. A message says: "Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information." It also says: "If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile." A "Profile Detail" section shows the profile's name, license, and creation details. A "Page Layouts" section lists various standard object layouts and their corresponding global page layouts. For example, for the "Account" object, the "Account Layout" is listed under "Standard Object Layouts" and "Global Global Layout [View Assignment]" is listed under "Page Layouts".

The screenshot shows the 'Profiles' section under 'Standard Object Permissions'. It displays two large tables of checkboxes for various objects like Accounts, Addresses, Assets, etc., across six permission categories: Read, Create, Edit, Delete, View All, and Modify All.

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

The screenshot shows the 'Customer' object under 'Custom Object Permissions'. It displays two tables of checkboxes for various permissions: Basic Access (Read, Create, Edit, Delete, View All, Modify All) and Data Administration (Read, Create, Edit, Delete, View All, Modify All). The 'Property' row has checked boxes for Read, Create, Edit, View All, and Modify All under both sections.

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

- **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”.**

The screenshot shows the 'Manager' profile details page. It includes sections for Profile Detail (Name: Manager, User License: Salesforce Platform, Description: Created By Thowfiq Ali S. 18/11/2024, 12:49 am), Page Layouts (Standard Object Layouts, Global Layouts, and various Home Page and Account Layouts), and a Help for this Page link.

Profile Detail	
Name	Manager
User License	Salesforce Platform
Description	
Created By	Thowfiq Ali S. 18/11/2024, 12:49 am
Modified By	Thowfiq Ali S. 21/11/2024, 2:45 pm

Page Layouts	
Standard Object Layouts	Global Layouts
Email Application	Not Assigned [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Account	Account Layout [View Assignment]
Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout [View Assignment]
Fulfillment Order Product	Fulfillment Order Product Layout [View Assignment]
Idea	Varies by Record Type [View Assignment]
Individual	Individual Layout [View Assignment]

**SETUP 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"/>				<input type="checkbox"/>		Contact Point Type Consents	<input type="checkbox"/>				
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Customers	<input type="checkbox"/>				
Authorization Forms	<input type="checkbox"/>	D&B Companies	<input type="checkbox"/>									
Authorization Form Consents	<input type="checkbox"/>	Data Use Legal Bases	<input type="checkbox"/>									
Authorization Form Data Uses	<input type="checkbox"/>	Data Use Purposes	<input type="checkbox"/>									
Authorization Form Texts	<input type="checkbox"/>	Documents	<input type="checkbox"/>									
Background Operations	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	Engagement Channel Types	<input type="checkbox"/>				
Business Brands	<input type="checkbox"/>	Ideas	<input type="checkbox"/>									
Communication Subscriptions	<input type="checkbox"/>	Individuals	<input type="checkbox"/>									
Communication Subscription Channel Types	<input type="checkbox"/>	Labels	<input type="checkbox"/>									
Communication Subscription Consents	<input type="checkbox"/>	Locations	<input type="checkbox"/>									
Communication Subscription Timings	<input type="checkbox"/>	Party Consents	<input type="checkbox"/>									
Contacts	<input type="checkbox"/>	Push Topics	<input type="checkbox"/>									
Contact Point Addresses	<input type="checkbox"/>	Sellers	<input type="checkbox"/>									
Contact Point Consents	<input type="checkbox"/>	Streaming Channels	<input type="checkbox"/>									
Contact Point Emails	<input type="checkbox"/>	User External Credentials	<input type="checkbox"/>									

**SETUP Profiles**

**Custom Object Permissions**

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

## 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”.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed, and the main area displays the 'Fields & Relationships' section for the 'User' object. The table lists various fields with their labels, API names, and data types. A new field, 'Verified', is visible at the bottom of the list, defined as a Checkbox data type. The status bar at the bottom right indicates the date as 23-11-2024 and the time as 16:15.

The screenshot shows the details of the 'Verified' field within the Salesforce Object Manager. The 'Field Information' section shows the field label as 'Verified', the API name as 'Verified\_c', and the data type as 'Checkbox'. The 'General Options' section shows the default value as 'Unchecked'. The 'Validation Rules' section indicates that no validation rules have been defined. The status bar at the bottom right indicates the date as 23-11-2024 and the time as 16:16.

## Task 8 : Create Users.

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

### User:1

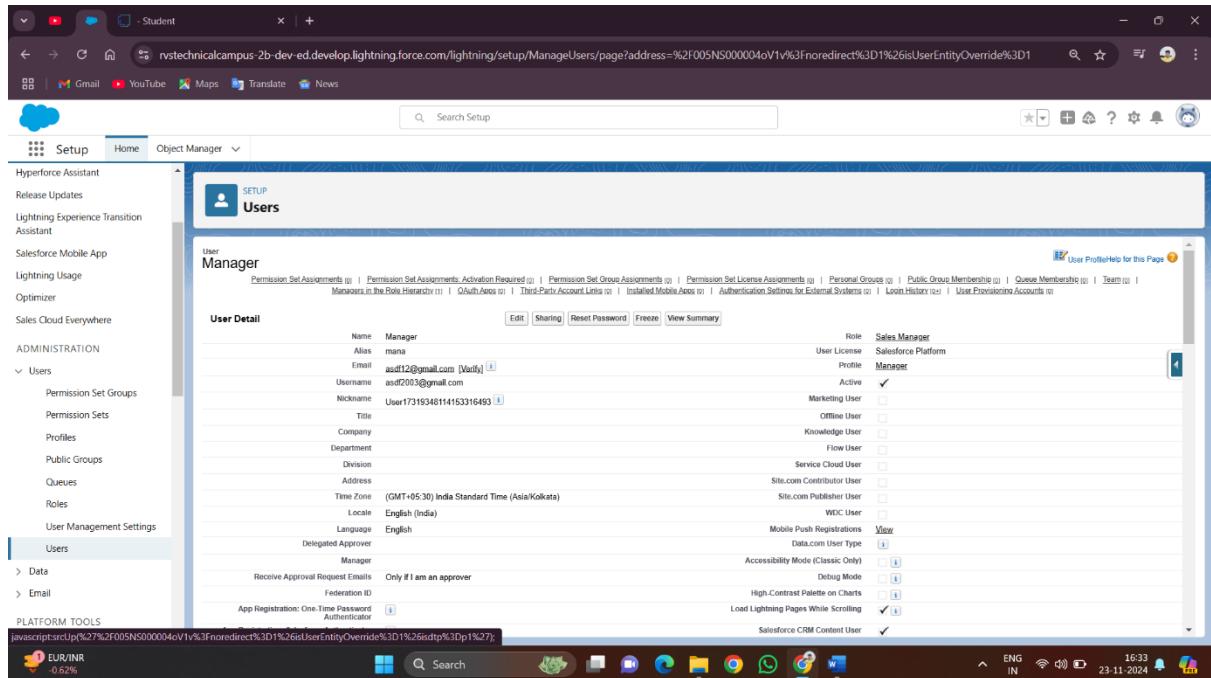
In setup navigate to Administration > Users > New User, fill in the Last Name as “Executive”, set the Role to “Sales Executive”, select the License as “Salesforce Platform”, choose the Profile as “System Administrator”, and save.

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', 'ADMINISTRATION' (with 'Users' selected), 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The main content area is titled 'User Executive' under 'User Detail'. The 'Name' field is set to 'Executive', 'Alias' to 'exec', 'Email' to 'asd12@gmail.com', 'Username' to 'asd12003@gmail.com', and 'Nickname' to 'User1731934547711972592'. The 'Role' is set to 'Sales Executive', 'User License' to 'Salesforce', and 'Profile' to 'System Administrator'. Other settings like 'Active', 'Marketing User', 'Offline User', etc., are also visible. At the bottom, there are buttons for 'Edit', 'Sharing', 'Reset Password', 'Freeze', and 'View Summary'.

The screenshot shows the 'All Users' page in the Salesforce Setup interface. The left sidebar is identical to the previous screenshot. The main content area displays a table of users with columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. The table lists several users, including 'Chatter Power' (Customer), 'Customer', 'Customer2', 'Executive', 'Manager', 'S\_Thowfik Ali', 'User Integration', and 'User\_Security'. Each row has an edit icon and a checkbox for 'Active'. The 'Profile' column shows 'Chatter Free User', 'Customer', 'Customer', 'System Administrator', 'Manager', 'System Administrator', 'Analytics Cloud Integration User', and 'Analytics Cloud Security User'. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

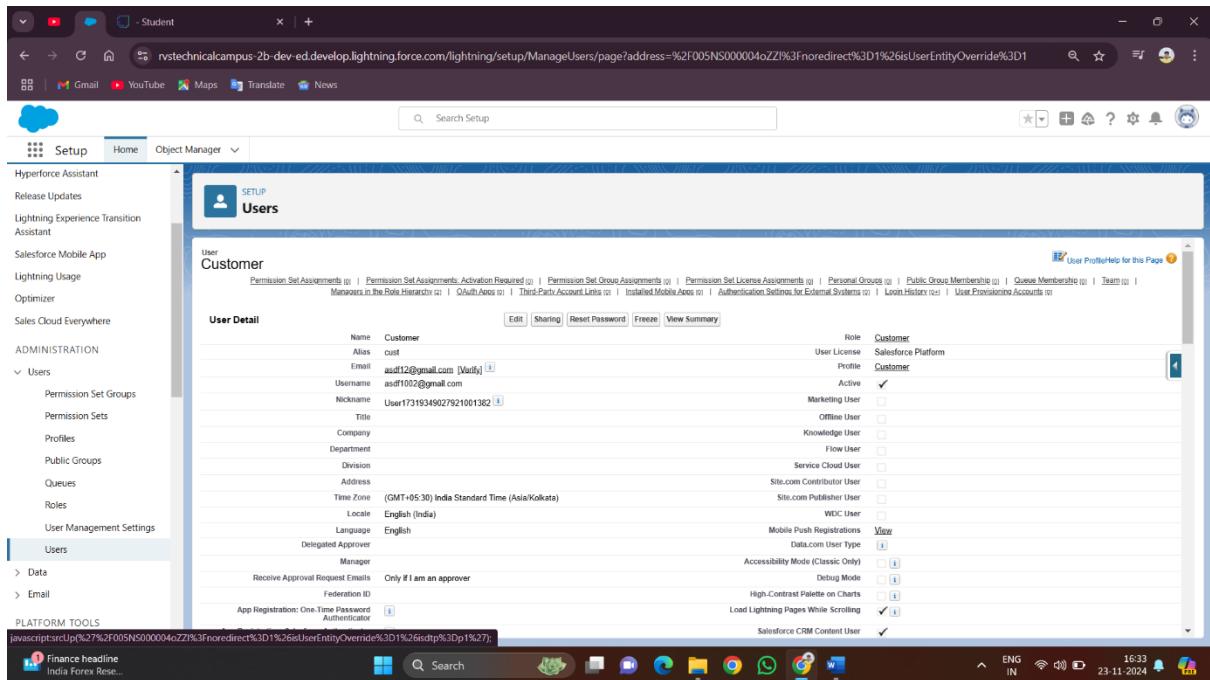
## User:2

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.



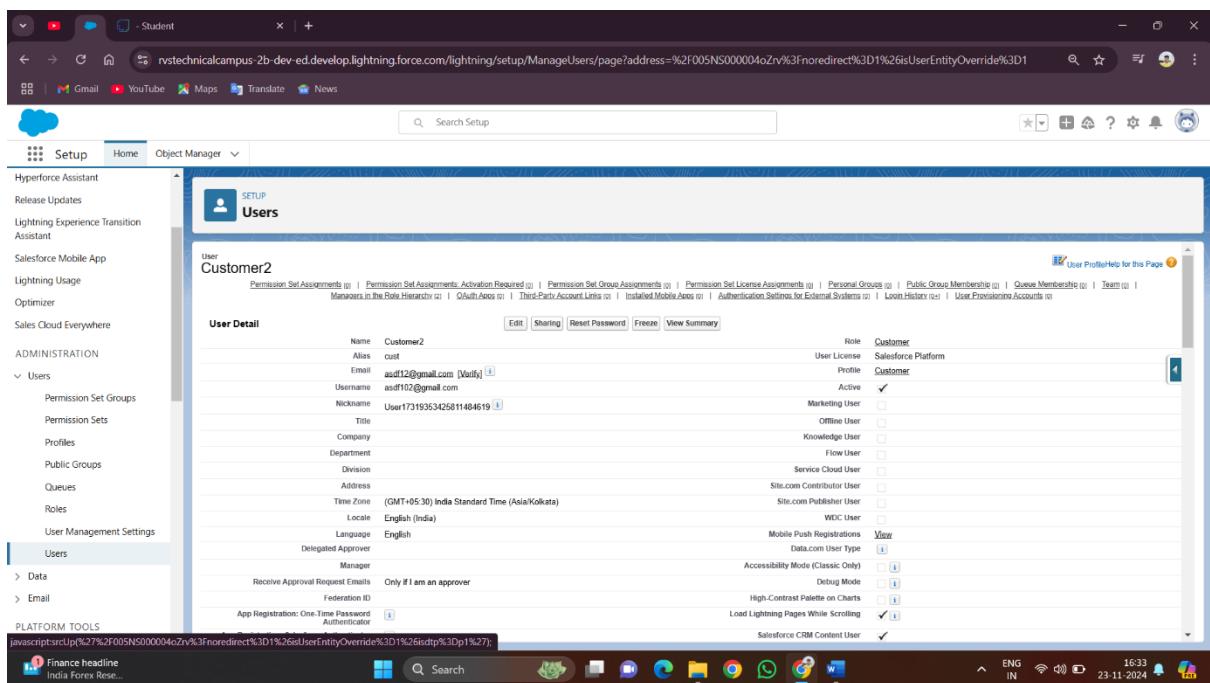
## User:3

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.

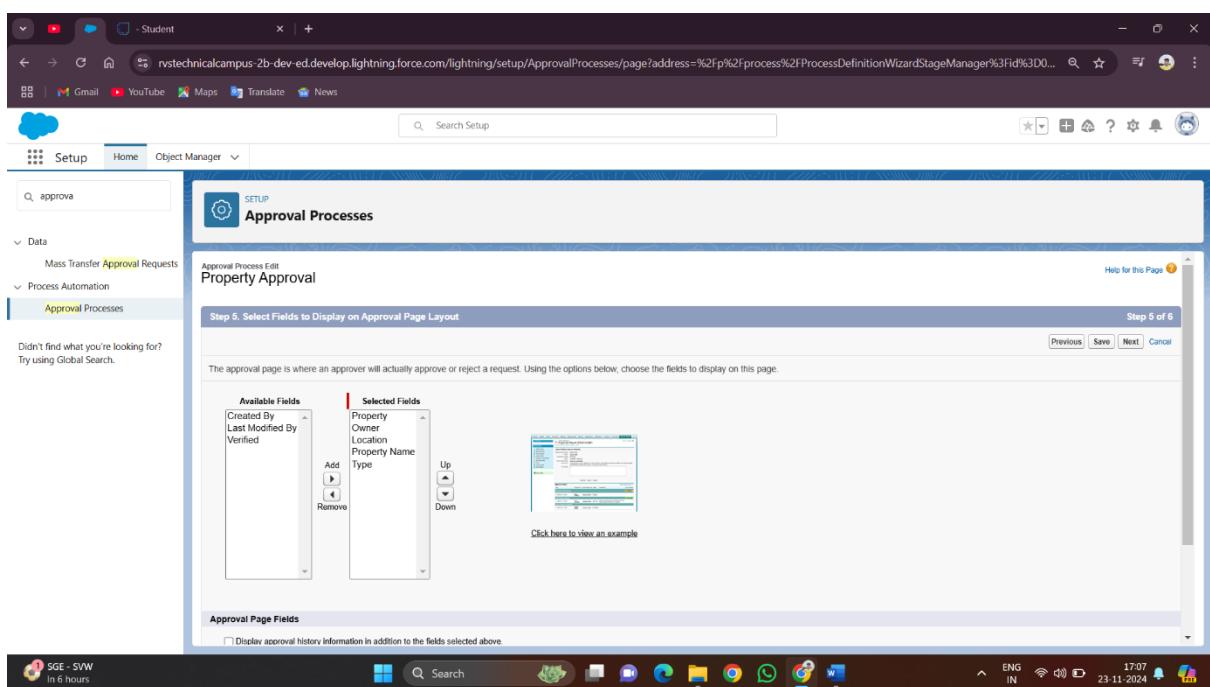
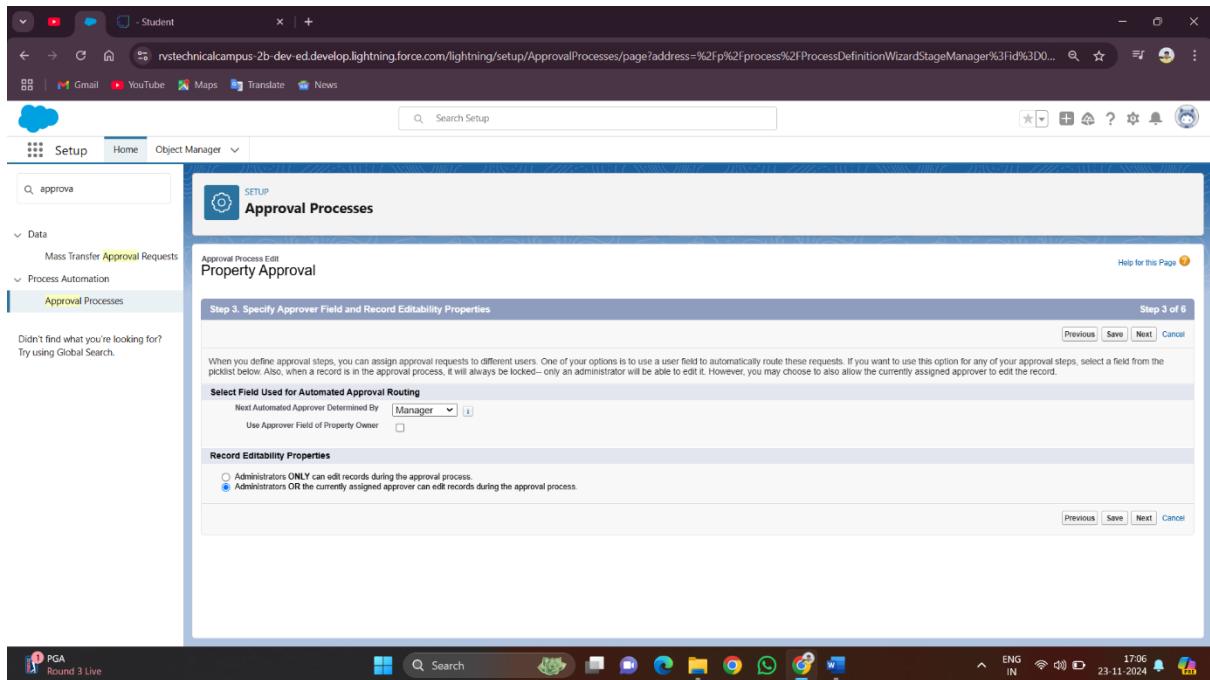


## Task 9 : Create an Approval Process for Property Object.

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.

The screenshot shows the 'Approval Processes' page in the Salesforce setup. A specific process named 'Property Approval' is selected. The 'Process Definition Detail' section includes fields like Process Name (Property Approval), Unique Name (Property\_Approval), Description, Entry Criteria (Property: Location NOT EQUAL TO blank AND Property: Verified EQUALS False), Record Editability (Administrator OR Current Approver), Approval Assignment Email Template, Initial Submitters (Property Owner, Role: Sales Manager), and Created By (Thonfik Ali S). The 'Active' checkbox is checked. The 'Initial Submission Actions' section contains an action type 'Record Lock' with a description 'Lock the record from being edited'. The 'Approval Steps' section lists a single step named 'Executive Approval' assigned to 'User:Executive'. The 'Final Approval Actions' section is empty. The status bar at the bottom indicates it was modified by Thonfik Ali S on 22/11/2024, 11:28 am.

The screenshot shows the 'Step 1. Enter Name and Description' screen of the Approval Process Wizard. The process name is 'Property Approval' and the unique name is 'Property\_Approval'. The 'Description' field is empty. The status bar at the bottom indicates it was modified by Thonfik Ali S on 22/11/2024, 11:28 am.



The screenshot shows the 'Approval Processes' setup page in Salesforce. The page title is 'Property Approval'. It is Step 6 of 6, titled 'Specify Initial Submitters'. The submittor type is set to 'Owner'. A search bar shows 'Owner' and a 'Find' button. On the left, there's a sidebar with 'Data' (Mass Transfer Approval Requests), 'Process Automation' (Approval Processes selected), and a global search bar. The bottom status bar shows 'SGE - SVW In 6 hours'.

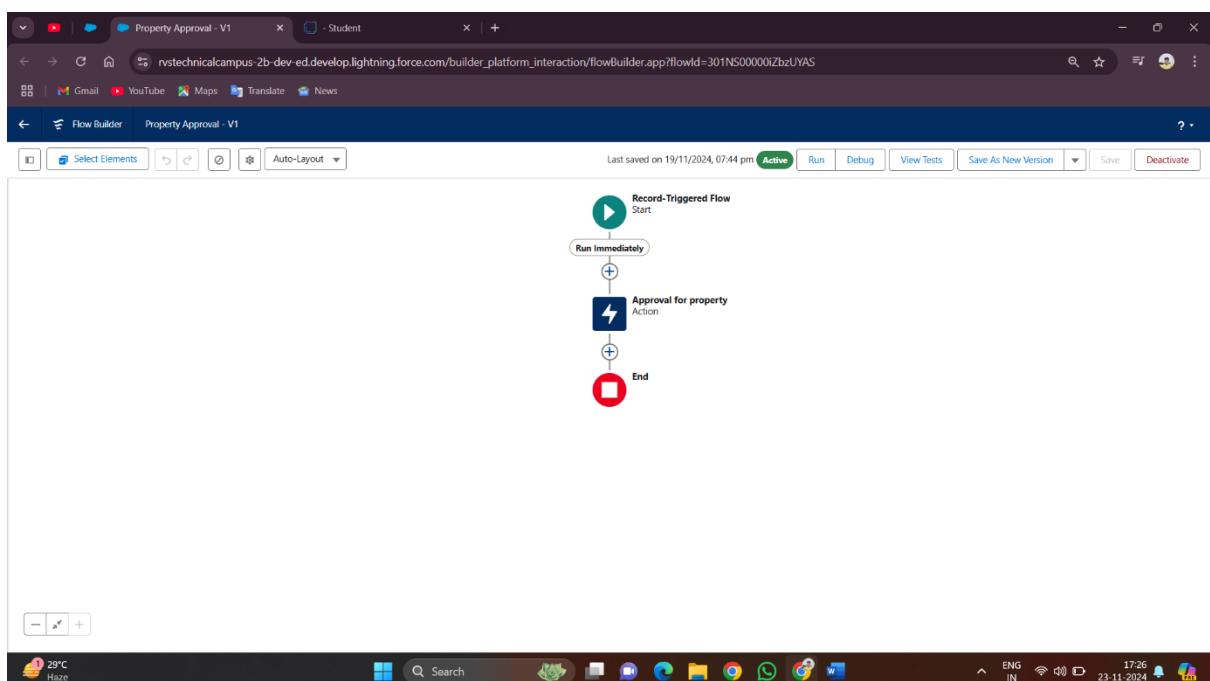
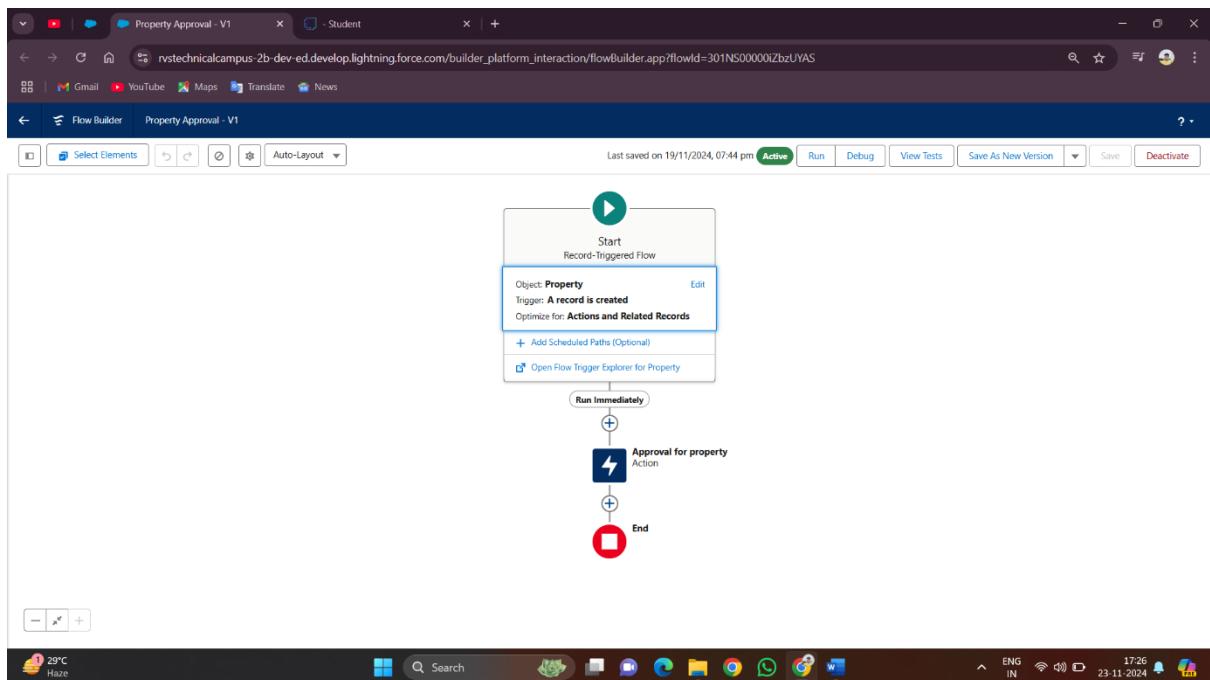
The screenshot shows the 'Field Updates' setup page in Salesforce. The page title is 'All Workflow Field Updates'. It lists three actions: 'Changes the case priority to high.', 'Unverified Property', and 'Verified Property'. The 'Verified Property' action has a timestamp of '22/11/2024'. The sidebar includes sections for 'Object and Field Aliases' (Field History Tracking, Marketing, LinkedIn Lead Gen, Lead Gen Fields, Service, Field Service, Field Service Mobile, App Builder, Field Service Settings), 'Objects and Fields' (Object Manager, Picklist Value Sets, Schema Builder), 'Process Automation' (Workflow Actions, Field Updates selected), and 'Security' (Field Accessibility). The bottom status bar shows 'Rain showers Next Wednesday'.

## 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.

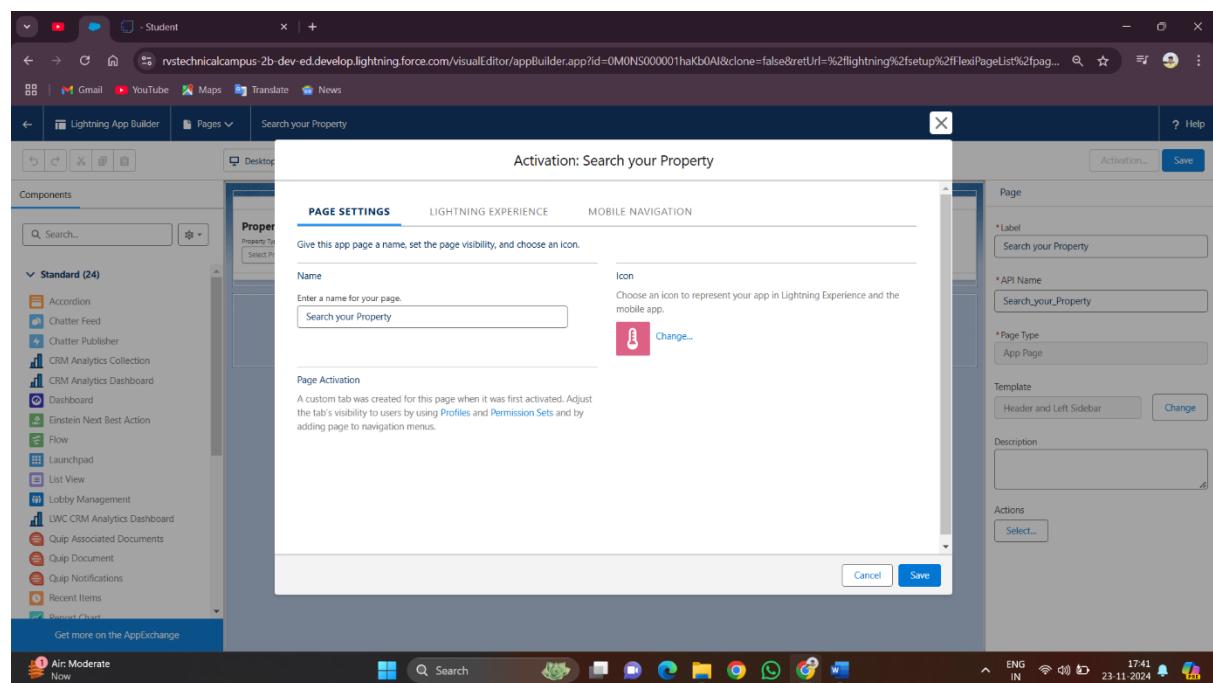
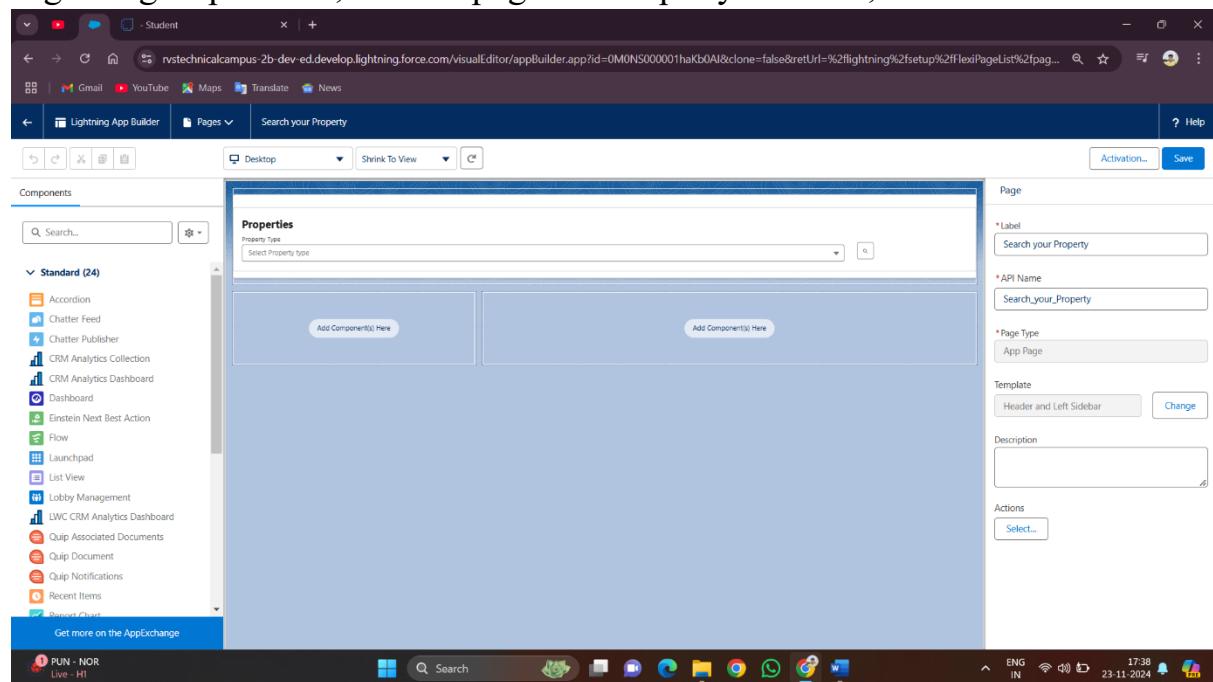


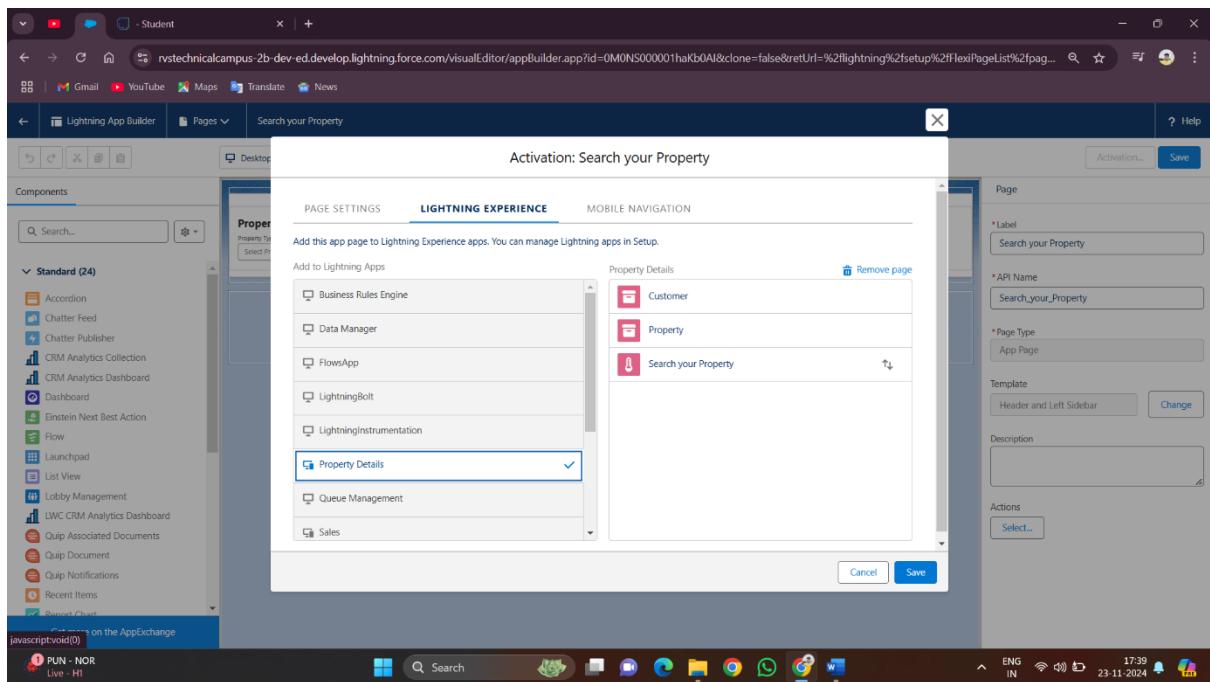
## Task 11 : Create an App Page.

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 label “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.

```

public class PropertyHandler_LWC {
    @AuraEnabled(cacheable=true)
    public static List<Property__c> getProperty(String type, Boolean verified) {
        return [
            SELECT Id, Location__c, Property_Name__c, Type__c, Verified__c
            FROM Property__c
            WHERE Type__c = :type AND Verified__c = :verified
        ];
    }
}

```

```

<template>
  <lightning-card>
    <div class="slds-box">
      <div style="font-size: 20px;"><b>Properties</b></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={propertyoptions} onchange={changehandler}>
        </lightning-combobox>
      </div>
      <div class="slds-col slds-size_1-of-6">
        <br>
        <lightning-button-icon variant="neutral" icon-name="standard:search" alternative-text="Search"
          label="Search" onclick={handleClick}>
        </lightning-button-icon>
      </div>
    </div>
  </lightning-card>
</template>
<template if:true={istrue}>
  <div class="slds-box">
    <lightning-data-table key-field="id" data={propertylist} columns={columns}></lightning-data-table>
  </div>
</template>
<template if:false={isfalse}>
  <div class="slds-box">
    <div style="font-size: 15px;"><b>No properties Are Found !!</b></div>
  </div>
</template>

```

```

import { LightningElement, api, track, wire } from 'lwc';
import getProperty from '@salesforce/apex/PropertyHandler_LWC.getProperty';
import { getRecord } from 'lightning/uirecordapi';
import USER_ID from '@salesforce/user/Id';

export default class C_01_Property_Management extends LightningElement {
  @api recordId;
  userId = USER_ID;
  verifiedvar;
  typevar;
  isFalse = true;
  iTrue = 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.verifiedvar = data.fields.Verified_c.value;
    } else {
      console.error(error);
    }
  }
  changehandler(event) {
    this.typevar = event.target.value;
  }
}

```

```

<force-app> main > default > lwc > c_01_Property_Management > c_01_Property_Management.js-meta.xml ...
1  <?xml version="1.0" encoding="UTF-8"?>
2  <LightningComponentBundle xmlns="http://soap.partnerforce.com/2006/04/metadata">
3      <apiVersion>59.0</apiVersion>
4      <isExposed>true</isExposed>
5      <targets>
6          <target>lightning_RecordPage</target>
7          <target>lightning_AppPage</target>
8          <target>lightning_HomePage</target>
9      </targets>
10     </LightningComponentBundle>
11

```

The screenshot shows the VS Code interface with the following details:

- File Explorer:** Shows the project structure under "CRM APPLICATION". Key files include ".husky", ".sfdx", ".vscode", "force-app\main\default\c\_01\_Property\_Management\c\_01\_Property\_Management.js", and ".eslintrc.json".
- Code Editor:** Displays the contents of "c\_01\_Property\_Management.js-meta.xml".
- Bottom Status Bar:** Shows "Ln 11, Col 1" and other developer information.
- Taskbar:** Includes icons for search, file operations, and various applications like browser, file explorer, and terminal.

```

PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL PORTS HISTORY Salesforce CLI
11:56:02.591 Starting SFDX: Deploy This Source to Org
==== Deployed Source
STATE FULL NAME TYPE PROJECT PATH
Created c_01_Property_Management LightningComponentBundle force-app\main\default\lwc\c_01_Property_Management\c_01_Property_Management.html
Created c_01_Property_Management LightningComponentBundle force-app\main\default\lwc\c_01_Property_Management\c_01_Property_Management.js
Created c_01_Property_Management LightningComponentBundle force-app\main\default\lwc\c_01_Property_Management\c_01_Property_Management.js-meta.xml
11:56:05.113 ended SFDX: Deploy This Source to org

```

The screenshot shows the Salesforce CLI terminal window with the following details:

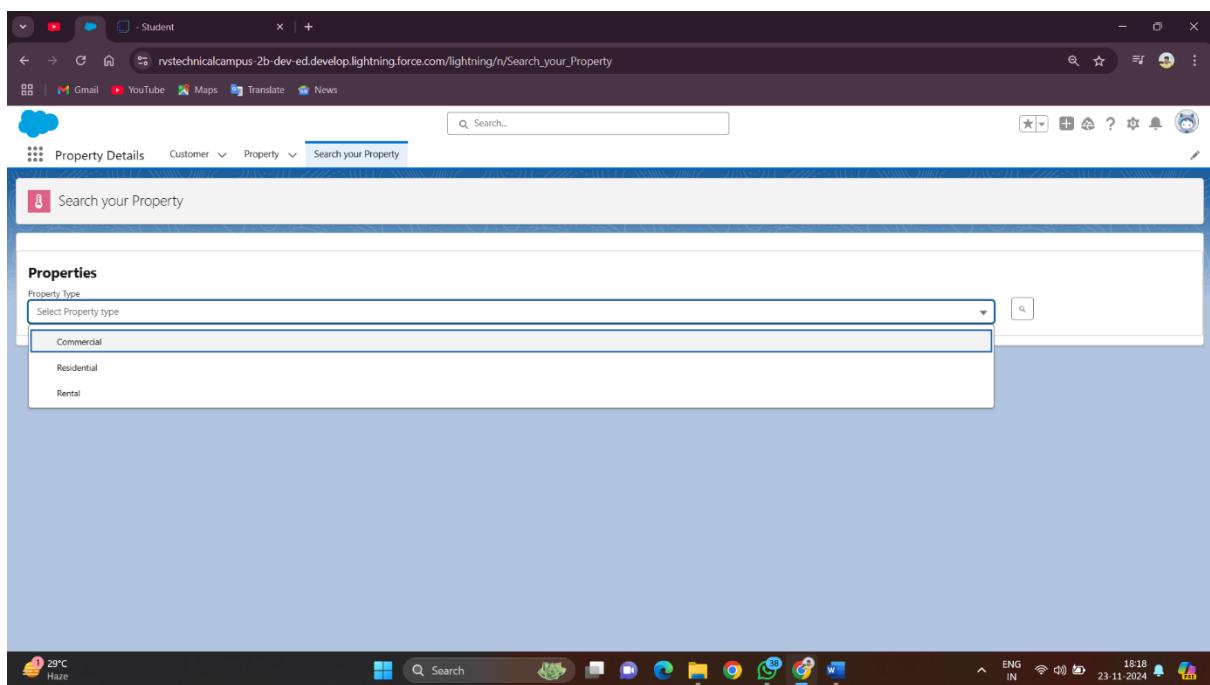
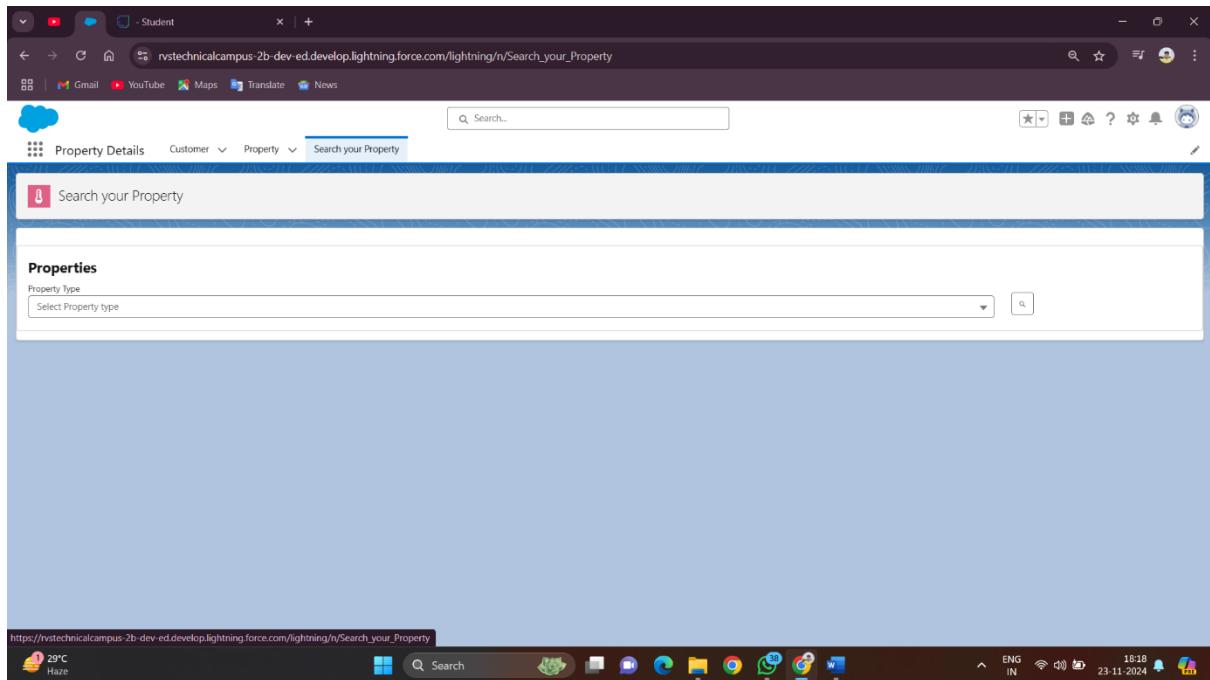
- Terminal Output:** Displays the deployment logs, indicating successful creation of three components: a Lightning Component Bundle, its JS file, and its meta XML file.
- Bottom Status Bar:** Shows "Ln 36, Col 1" and other developer information.
- Taskbar:** Includes icons for search, file operations, and various applications like browser, file explorer, and terminal.

## 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 Apex Classes page. The URL is <https://rvtechnicalcampus-2b-dev-ed.develop.lightning.force.com/lightning/setup/ApexClasses/home>. The page displays the 'Apex Classes' section with a table listing one class: 'PropertyHandler\_LWC'. The class details are as follows:

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit   Del   Security	PropertyHandler_LWC		62.0	Active	350	ThomR_Als	22/11/2024, 11:31 am

Below the table, there is a 'Dynamic Apex Classes' section with a table showing no records.

The screenshot shows the Salesforce Profiles page. The URL is [https://rvtechnicalcampus-2b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F\\_u%2Fperms%2Fur%2Fprofile%2FApexClassProfilePermissionEdit%2Fe...](https://rvtechnicalcampus-2b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_u%2Fperms%2Fur%2Fprofile%2FApexClassProfilePermissionEdit%2Fe...). The page displays the 'Enable Profile Access for Apex Class' section for 'PropertyHandler\_LWC'. It lists 'Available Profiles' and 'Enabled Profiles'. The 'Enabled Profiles' list contains 'Customer Manager' and 'System Administrator'. There are 'Add' and 'Remove' buttons between the two lists.

**THANK YOU**

!!!