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

Project Overview:

Dreams World Properties integrates Salesforce to streamline customer interactions. Website engagement triggers automated record creation in Salesforce, capturing customer details and preferences. Salesforce categorizes users as approved or non-approved, offering tailored property selections to approved users. This enhances user experience and efficiency, providing personalized recommendations and broader listings. Seamless integration optimizes operations, improving customer engagement and facilitating growth in the real estate market.

Project Objectives:

1. Customer Interactions: Automate capturing and managing customer data from the website.
2. **Efficient Categorization**: Segment users into approved and non-approved ca**Streamline**tegories for personalized service delivery.
3. **Enhanced Property Recommendations**: Provide approved users with tailored property options, improving user experience.
4. **Seamless Integration**: Establish end-to-end integration between the website and Salesforce.
5. **Operational Optimization**: Improve efficiency in handling client inquiries and property management.

Key Features:

1. **Automated Data Capture**:
   - Automatically capture customer details and preferences (e.g., property type, budget, location) from website interactions.
   - Use Salesforce Flow or Apex triggers to ensure seamless record creation.
2. **User Categorization**:
   - Define criteria for categorizing users as "Approved" or "Non-Approved" (e.g., based on credit checks, admin approval, or financial status).
   - Use custom fields and record types to manage this categorization.

3. **Property Recommendations**:
   - Approved users receive curated property listings based on their preferences.
   - Use Salesforce Einstein or custom logic to suggest matching properties dynamically.
   - Integrate recommendations with Lightning Web Components (LWCs) for a responsive, user-friendly UI.
4. **Integration with Website**:
   - Use Salesforce APIs, Heroku, or middleware tools (e.g., Mulesoft, Zapier) for real-time synchronization between the website and Salesforce.
   - Web-to-Lead or Web-to-Case can handle data input for simpler implementations.
5. **Dashboards and Reports**:
   - Design Salesforce dashboards for property performance, user categorization, and sales metrics.
   - Provide actionable insights for admins and managers.

Tools and Technologies:

- **Salesforce Core**: For CRM functionality (Admin/Developer features).
- **Salesforce APIs**: REST, SOAP, or Bulk API for integration.
- **Lightning Web Components (LWCs)**: To build custom UI components.
- **Salesforce Flow**: To automate processes like approval or notifications.
- **Salesforce Einstein**: (Optional) To enhance property recommendations.
- **Third-party Middleware**: Mulesoft/Heroku for complex integrations.
- **Version Control**: Git for tracking development changes.

Deliverables:

1. Configured Salesforce instance with CRM functionality.
2. Automated user categorization and property recommendations.
3. Real-time integration between the website and Salesforce.
4. Dashboards and reports for analytics.
5. User documentation and training materials.

Required Skills

1. **Salesforce Admin**:
   - Setting up objects, fields, and page layouts.
   - Creating workflows, approval processes, and validation rules.
   - Designing and implementing dashboards and reports.
2. **Salesforce Developer**:
   - Building custom **Apex classes**, triggers, and batch processes.
   - Developing **Lightning Web Components (LWCs)** for user interaction.
   - Implementing API integrations for website and third-party tools.
   - Creating **Test Classes** to ensure robust deployment.
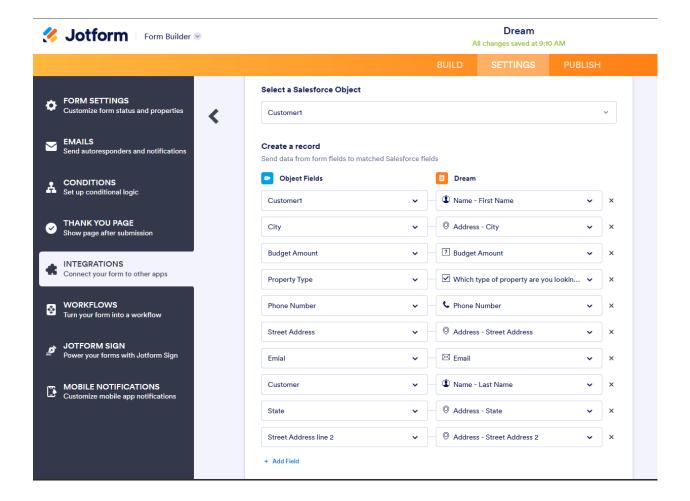
Steps for Implementing the CRM Application

Milestone 1: Create a JotForm and Integrate It With Salesforce

- **Objective**: Automate the creation of customer records.
  a. Design a JotForm to capture customer details.
  b. Export collected data to a spreadsheet.
  c. Use Salesforce tools (Data Import Wizard or custom scripts) to create objects from the spreadsheet
  d. Integrate JotForm with Salesforce using REST API or a third-party integration tool.

Create Salesforce Roles and Profiles

- **Objective**: Define access and responsibilities.
  a. Set up roles to manage hierarchy-based permissions (e.g., Admin, Sales Representative).
  b. Configure profiles for field-level and object-level permissions.

Dream

Name *

First Name

Last Name

Email

example@example.com

Phone Number

000 000 0000

Please enter a valid number.

Which type of property are you looking for?

☐ Residential

☐ Commercial

☐ Rental

Budget Amount *

e.g., 23

Address

Street Address

Street Address Line 2
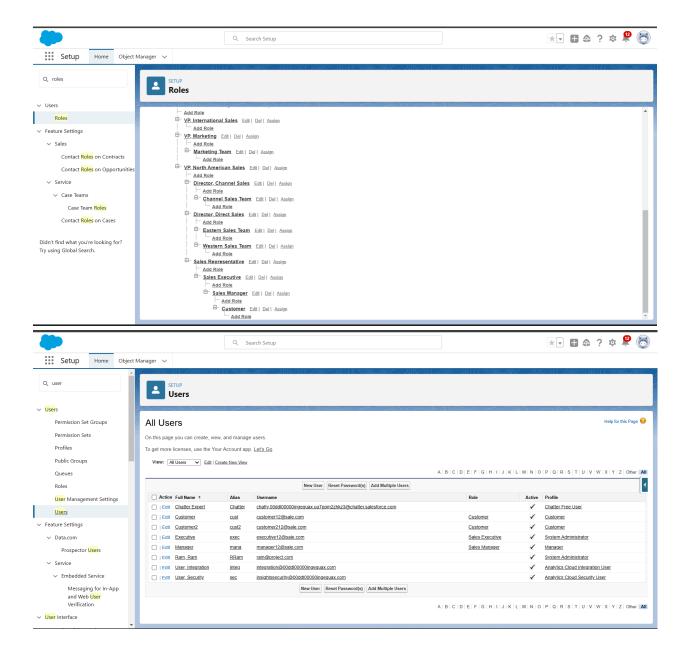
City

State / Province

Postal / Zip Code

Submit

Build the Property Details App

- **Objective**: Centralize property data and functionality.
  a. Create custom objects for properties.
  b. Add fields for property details (e.g., location, price, type, status).
  c. Use page layouts to display these details effectively.

Create a Checkbox Field on the User Object

- **Objective**: Enable approval categorization.
  - Add a custom checkbox field to indicate user approval status.

Create Users

- **Objective**: Assign roles and profiles.
  - Add user accounts with appropriate roles and profiles for team membersSet Up an Approval Process for Property Object
- **Objective**: Facilitate property approvals.
  a. Use the Salesforce Approval Process to define stages (e.g., submission, review, approval).
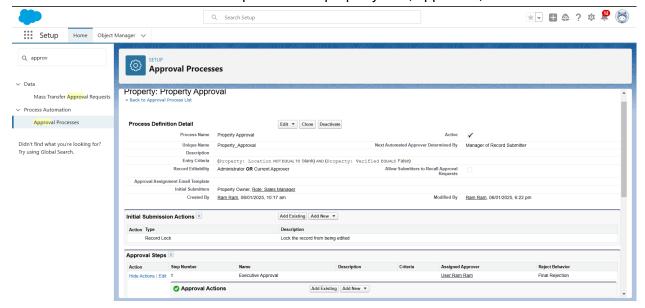
    b.   Assign approvers based on roles.

Automate the Approval Process Using Record Trigger Flow

- **Objective**: Trigger approvals automatically.
  - Create a Record-Triggered Flow in Salesforce to initiate the approval process when specific conditions are met (e.g., property added

Create an App Page

- **Objective**: Provide a centralized interface.
  - a. Design an app page in Salesforce using the App Builder.
  - b. Include relevant components like property lists, approvals, and dashboards.

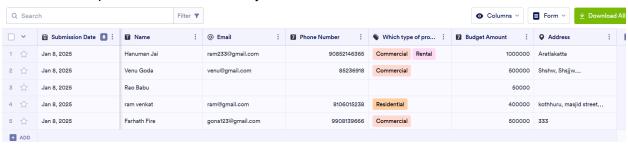
Develop a Lightning Web Component (LWC)

- **Objective**: Enhance user interaction.
  - a. Build an LWC for displaying dynamic property recommendations.
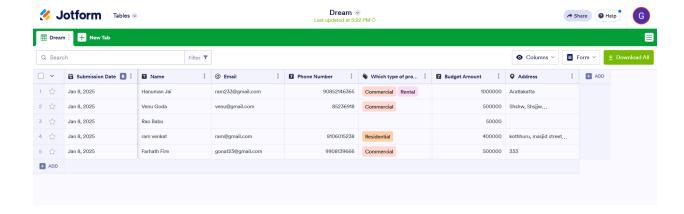 - b. Use JavaScript to handle logic and Apex to fetch data.

Add the Component to the App Page

- **Objective**: Integrate the LWC.
  - Drag and drop the custom LWC onto the app page using the App Builder.

```
<> c_01_Property_Management.html  ✕      JS 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 > 🔲 template
     1    <template>
     2      <lightning-card>
     3        <div class="slds-box">
     4          <div class="slds-text-align_left">
     5            <h1 style="font-size: 20px;"><b>Properties</b></h1>
     6          </div>
     7          <div>
     8            <div class="slds-grid slds-gutters">
     9              <div class="slds-col slds-size_5-of-6">
    10                <lightning-combobox name="Type" label="Property Type" value={typevar} placeholder="Select Property type"
    11                  options={propetyoptions} onchange={changehandler}></lightning-combobox>
    12              </div>
    13              <div class="slds-col slds-size_1-of-6">
    14                <br>
    15                <lightning-button-icon variant="neutral" icon-name="standard:search" alternative-text="Search"
    16                label="Search" onclick={handleClick}></lightning-button-icon>
    17              </div>
    18            </div>
    19          </div>
```

Give Apex Class Access to Profiles

- **Objective**: Grant permissions for functionality.
  - Assign Apex class access to appropriate profiles to ensure the component and process work seamlessly.

Testing and Validation:

1. **Unit Testing**:
   - Verify the functionality of individual components such as data capture flows, approval processes, and LWCs.
   - Ensure test cases cover all possible user scenarios.
2. **Integration Testing**:
   - Test end-to-end functionality, ensuring seamless interaction between the website and Salesforce.
   - Validate the accuracy of data synchronization.
3. **User Acceptance Testing (UAT)**:
   - Collaborate with stakeholders to confirm that the system meets their requirements.
   - Address any feedback or adjustments needed.
4. **Performance Testing**:
   - Assess the system's performance under various loads to ensure reliability.
   - Optimize areas with potential bottlenecks.
5. **Security Testing**:
   - Verify data access permissions based on roles and profiles.
   - Ensure sensitive customer data is securely stored and transmitted.

Key Scenarios:

1. **Milestone 1: Automating Customer Record Creation**
   - Integrate JotForm with Salesforce to capture customer data and preferences automatically.
2. **Creating and Managing Objects**:
   - Create objects from spreadsheets to import initial data.
   - Use Salesforce to manage and update these objects.
3. **User and Role Management**:
   - Create user roles and profiles to control data access and permissions.
   - Add a checkbox field to manage user approval status.
4. **Property Details App**:
   - Develop an app to store, display, and manage property details.
5. **Approval Process**:
   - Implement an approval process for property objects to streamline decision-making.

- Use record-triggered flows to automate approval submissions.
6. **LWC Component**:
   - Create and drag an LWC component to an app page to enhance UI functionality.
7. **Apex Class Access**:
   - Grant Apex class access to profiles for advanced functionality.

Conclusion:

The CRM application for Dreams World Properties leverages Salesforce to enhance customer interaction, streamline property management, and improve operational efficiency. With features such as automated data capture, personalized recommendations, and seamless integration, the system is tailored to meet the unique needs of the real estate market. By undergoing thorough testing and validation, the solution ensures reliability, security, and scalability. This comprehensive approach fosters growth, boosts customer satisfaction, and positions Dreams World Properties as a leader in the industry.

THANK YOU.....