

# **A CRM Application to Handle The Clients And Their Property Related Requirements**

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## **1. Project Overview**

The Nanmudhalvan CRM Project is a comprehensive Customer Relationship Management (CRM) application designed to manage clients and their property-related requirements efficiently. This overview outlines the primary objects (classes) within the system, their attributes, methods, and the relationships between them. This objectoriented approach ensures scalability, maintainability, and seamless integration of various functionalities essential for real estate management.

## **2. Objectives**

- **Business Goals:**

1. Attract new clients by offering a streamlined, efficient CRM experience tailored to their real estate needs.
2. Improve client satisfaction and loyalty by delivering personalized service, which leads to increased client retention and repeat business. Improve operational efficiency for admissions and administrative staff, reducing processing time and enhancing student experience.

- **Specific Outcomes:**

1. Achieve a measurable increase in client satisfaction scores through personalized service, quicker response times, and streamlined communication.

Improve client engagement by providing a tailored experience that addresses each client's unique property needs and preferences. Enable automated email notifications and generate reports to track application metrics, acceptance rates, and enrollment trends.

2. Develop a CRM system that can accommodate an expanding client base, property listings, and new agents with
3. Reduce the time properties spend unlisted or unsold, optimizing property utilization and boosting revenue from quicker transactions.
4. Generate detailed reports on market trends, popular property features, and client preferences, helping management adjust offerings and strategies based on real demand.

### 3. Salesforce Key Features and Concepts Utilized

- **Objects and Data Modeling:**

Custom objects were created to manage critical data, including client information, property listings, and specific client requirements. This structured data modeling allows for efficient organization and retrieval of information essential for managing real estate transactions.

- **Process Builder and Automation:**

Workflows were set up to automate property recommendations based on client requirements, notifications for new listings or deals, and updates on the status of deals.

- **Approval Processes:**

Approval workflows for new property listings and deals were implemented to ensure listings meet company standards and that all deals are reviewed before finalization.

- **Email Alerts and Notifications:**

Email notifications were created for critical actions, such as new property listings, deal status changes, and client engagement follow-ups. These alerts ensure clients and agents receive timely updates, improving communication and keeping all stakeholders informed.

- **Reports and Dashboards:**

Custom reports and dashboards offer insights into client preferences, property availability, and deal closure rates. These analytics empower management and agents to make data-driven decisions, improving targeting, identifying popular property types, and monitoring deal progression.

- **Appointment Scheduling:**

The built-in scheduling feature allows agents to set up property viewings and consultations with clients, tracking appointment dates, times, and purposes directly within the CRM.

- **Case Management for Immigration:**

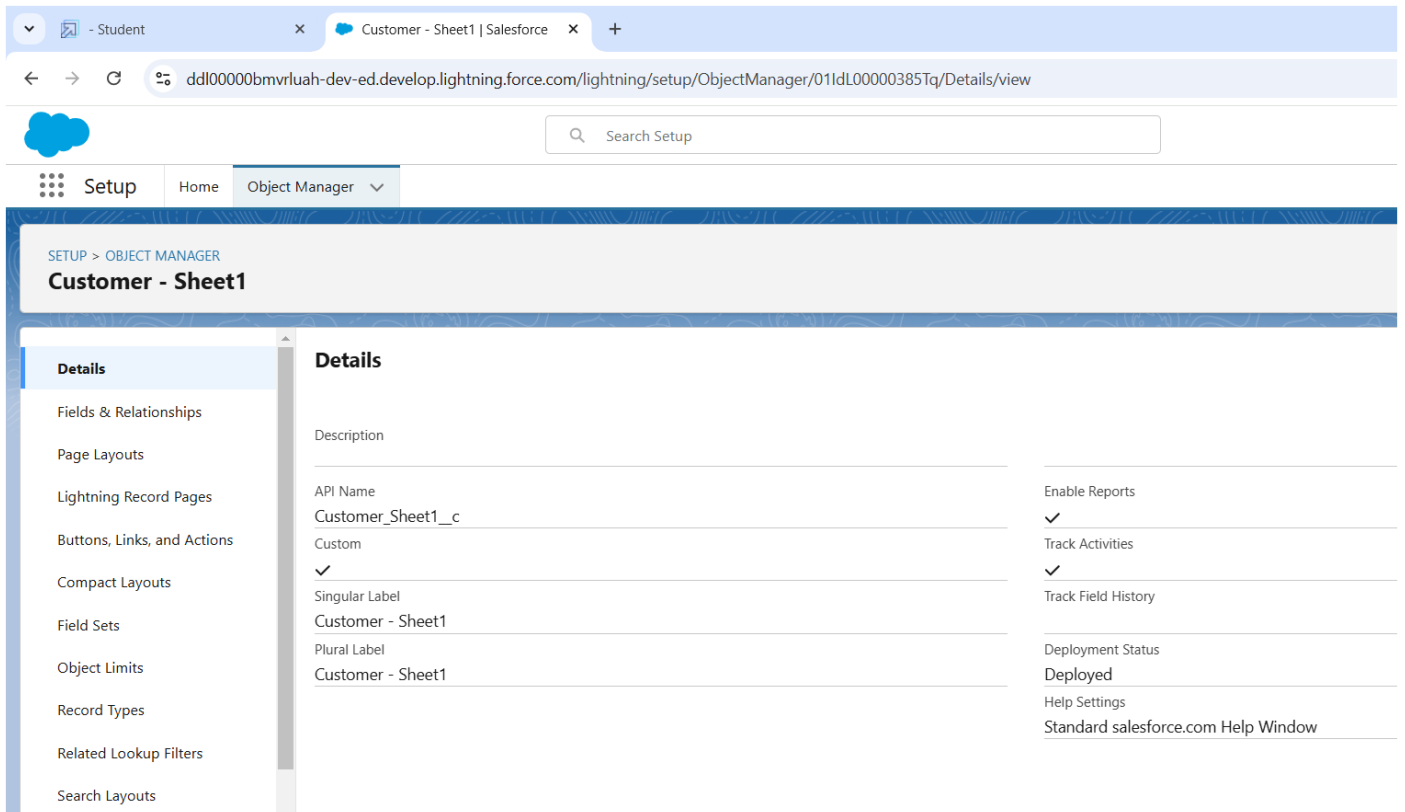
Salesforce's case management functionalities were leveraged to track and update client inquiries and property requests. Document management and collaboration tools are used for seamless communication and documentation of each client's requirements and deal status.

## 4. Detailed Steps to Solution Design

### 1. Create Objects from Spreadsheet

- **Create Customer object**
- **Create Property object**

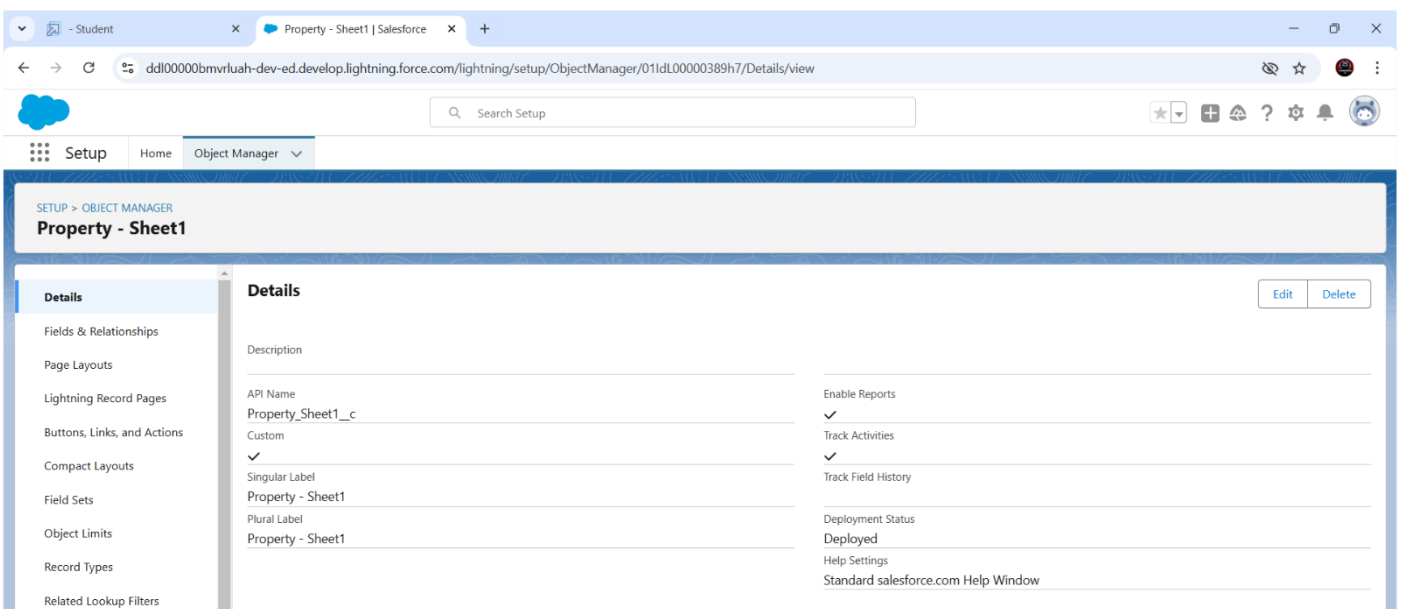
. **Create Custom Object**



The screenshot shows the Salesforce Object Manager setup page for 'Customer - Sheet1'. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays the 'Details' configuration for the object.

Details	
Description	
API Name	Customer_Sheet1__c
Custom	✓
Singular Label	Customer - Sheet1
Plural Label	Customer - Sheet1
Enable Reports	✓
Track Activities	✓
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## . Create Property Object



The screenshot shows the Salesforce Object Manager setup page for 'Property - Sheet1'. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays the 'Details' configuration for the object.

Details	
Description	
API Name	Property_Sheet1__c
Custom	✓
Singular Label	Property - Sheet1
Plural Label	Property - Sheet1
Enable Reports	✓
Track Activities	✓
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## . Integrate salesforce platform


**FORM SETTINGS**  
 Customize form status and properties

**EMAILS**  
 Send autoresponders and notifications

**CONDITIONS**  
 Set up conditional logic

**THANK YOU PAGE**  
 Show page after submission

**INTEGRATIONS**  
 Connect your form to other apps

**WORKFLOWS/** Formerly Approvals  
 Turn your form into a workflow

**JOTFORM SIGN**  
 Power your forms with Jotform Sign

 Salesforce **AppExchange** or integrate your custom forms with Salesforce via this handy integration.

Use this integration to

- Add new company leads, contacts, or accounts to Salesforce automatically
- Connect with any custom object
- Dynamically prefill forms with real-time Salesforce data
- Generate prefill links and detailed integration logs
- Send file attachments, PDFs, and signed documents to Salesforce

Log in to your **Salesforce account** and integrate with Jotform to get started. By gathering leads through Jotform and automatically relaying them to your sales pipeline — using either standard or custom objects — you can save time on manual processes and spend more time connecting with customers and closing important deals with your team. Get started with a **Salesforce form** now!

[Learn how to integrate your form with Salesforce.](#)
**Authentication**

Select your Salesforce account to create an integration

Select Salesforce account

Shyam Sunder - 636953312shyam@gmail.com

Give Feedback


**FORM SETTINGS**  
 Customize form status and properties

**EMAILS**  
 Send autoresponders and notifications

**CONDITIONS**  
 Set up conditional logic

**THANK YOU PAGE**  
 Show page after submission

**INTEGRATIONS**  
 Connect your form to other apps

**WORKFLOWS/** Formerly Approvals  
 Turn your form into a workflow

**JOTFORM SIGN**  
 Power your forms with Jotform Sign

**SALESFORCE**

Send new leads, contacts, or accounts to your sales CRM

**Select an action**

**Create or update a record**

Generate a new record or update an existing record


**Find existing record**

Find an existing record or create a new one if it doesn't already exist

Cancel

Next

Give Feedback

. Create Profiles

. Customer

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Profile Edit  
Customer

Set the permissions and page layouts for this profile.

Save Save & New Cancel

Profile Edit

Name Customer

User License Salesforce

Description

Custom Profile ☒

Custom App Settings Required Information

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>	<input type="radio"/>
Business Rules Engine (standard__ExpressionSetConsole)	<input type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard__Marketing)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

## . Manager

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Set the permissions and page layouts for this profile.

Save Save & New Cancel

Profile Edit

Name Contract Manager

User License Salesforce



Custom Profile ☐

Custom App Settings Required Information

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>	<input type="radio"/>
Business Rules Engine (standard__ExpressionSetConsole)	<input type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard__Marketing)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

## . Create Users


## . user 1

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**Executive**

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 [Permission Set License Assignments \(0\)](#) | 
 [Personal Groups \(0\)](#) | 
 [Public Group Membership \(0\)](#) | 
 [Queue Membership \(0\)](#) | 
 [Team \(0\)](#) | 
 [Managers in the Role Hierarchy \(0\)](#) | 
 [OAuth Apps \(0\)](#) | 
 [Third-Party Account Links \(0\)](#) | 
 [Installed Mobile Apps \(0\)](#) | 
 [Authentication Settings for External Systems \(0\)](#) | 
 [Login History \(0+\)](#) | 
 [User Provisioning Accounts \(0\)](#)

**User Detail**

Name	Executive	Role	Western Sales Team
Alias	exe	User License	Salesforce
Email	6369533122shyam@gmail.com <input type="button" value="Verify"/>	Profile	System Administrator
Username	6369533122shyam@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17311756394838080722 <input type="button" value="i"/>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	tiruvannamalai vinayagar kovil street tiruvannamalai 606603 tamilnadu India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<input type="button" value="i"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <input type="button" value="i"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <input type="button" value="i"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <input type="button" value="i"/>
App Registration: One-Time Password	<input type="button" value="i"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <input type="button" value="i"/>


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 [Permission Set License Assignments \(0\)](#) | 
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 [Queue Membership \(0\)](#) | 
 [Team \(0\)](#) | 
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 [Third-Party Account Links \(0\)](#) | 
 [Installed Mobile Apps \(0\)](#) | 
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 [Login History \(0+\)](#) | 
 [User Provisioning Accounts \(0\)](#)

**User Detail**

Name	Manager	Role	Western Sales Team
Alias	exe	User License	Salesforce Platform
Email	6369533122shyam@gmail.com <input type="button" value="Verify"/>	Profile	Standard Platform User
Username	6369shyam@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17311756916592059383 <input type="button" value="i"/>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	tiruvannamalai vinayagar kovil street tiruvannamalai 606603 tamilnadu India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<input type="button" value="i"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <input type="button" value="i"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <input type="button" value="i"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <input type="button" value="i"/>
App Registration: One-Time Password	<input type="button" value="i"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <input type="button" value="i"/>

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Edit Layout | User Profile | Help for this Page

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**User Detail** Edit Sharing Reset Password Freeze View Summary

Name	Customer	Role	Customer Support_North America
Alias	cust	User License	Salesforce Platform
Email	6369533122shyam@gmail.com [Verify]	Profile	Standard Platform User
Username	6369533122s@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User1731175823146792105	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	tiruvannamalai vinayagar kovil street tiruvannamalai 606603 tamilnadu India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

. User 4

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**User Customer2**  
Edit Layout | User Profile | Help for this Page

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)


**User Detail** Edit Sharing Reset Password Freeze View Summary

Name	Customer2	Role	Customer Support_North America
Alias	cust	User License	Salesforce Platform
Email	6369533122shyam@gmail.com [Verify]	Profile	Standard Platform User
Username	63695shyam@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17311759104294681249	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	tiruvannamalai vinayagar kovil street tiruvannamalai 606603 tamilnadu India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

Creating an jotform and integrate with org



← → ↺ jotform.com/form/240031134484041 ☆



## Dreams World

**Name \***

First Name Last Name

**Email**

example@example.com

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← → ↺ jotform.com/form/240031134484041 ☆

**Budget Amount \***

e.g., 23

**Address**

Street Address

Street Address Line 2

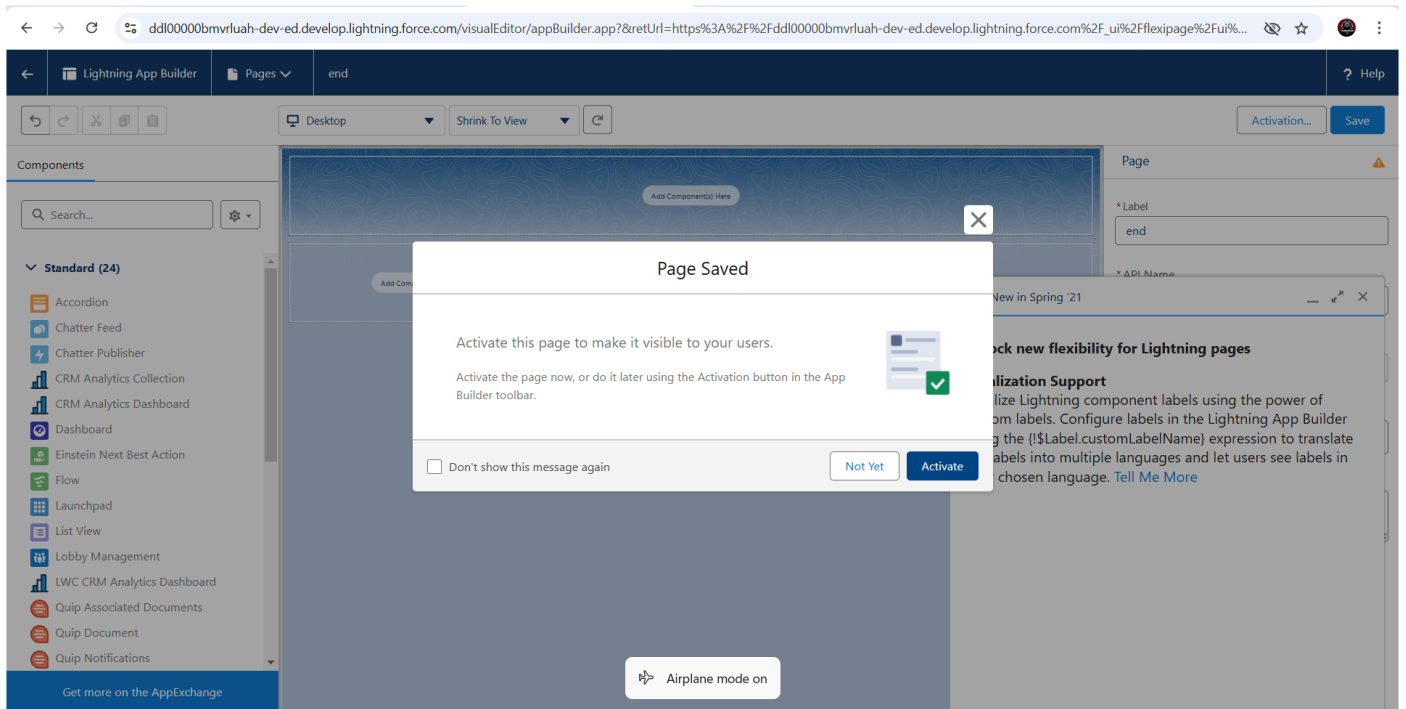
City State / Province

Postal / Zip Code

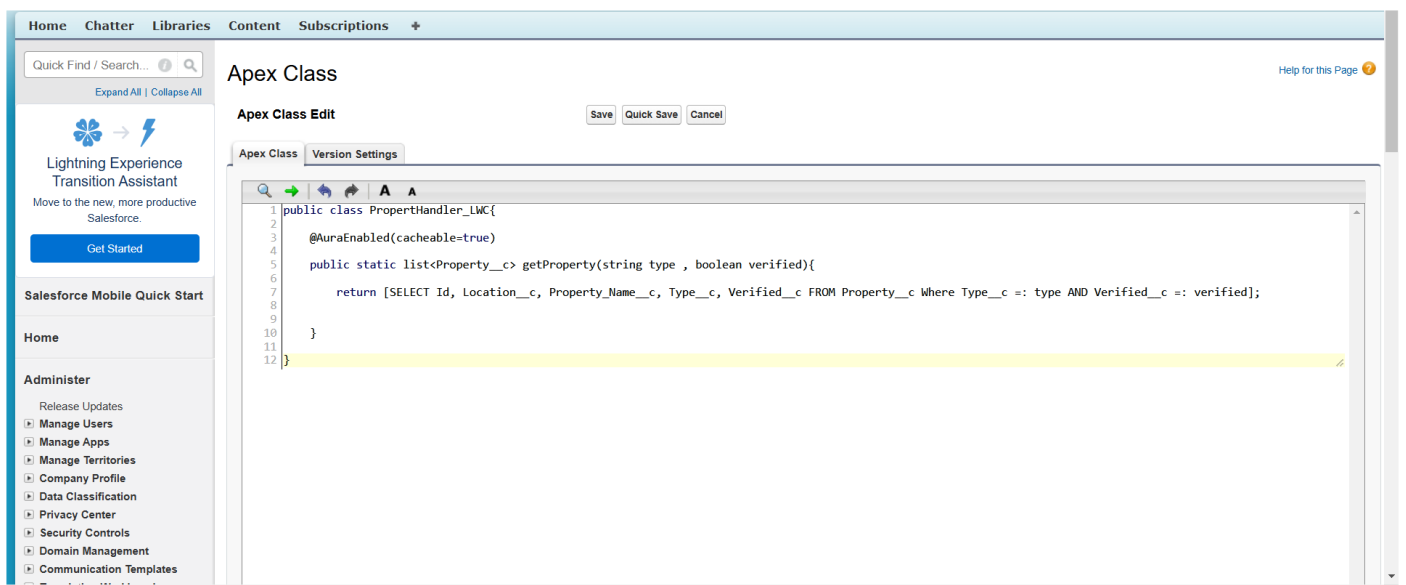
**Submit**

**Jotform** Now create your own Jotform - It's free! [Create your own Jotform](#)

## Creating an App Page



## Create A LWC Component



```

1  <template>
2
3  <lightning-card>
4
5      <div class="slds-box">
6
7          <div class="slds-text-align_left">
8
9              <h1 style="font-size: 20px;"><b>Properties</b></h1>
10
11          </div>
12
13          <div>
14
15              <div class="slds-grid slds-gutters">
16
17                  <div class="slds-col slds-size_5-of-6">
18
19                      <lightning-combobox name="Type" label="Property Type" value={typevar} placeholder="Select Property type"
20
21                          options={propertyoptions} onchange={changehandler}></lightning-combobox>
22
23                  </div>
24
25                  <div class="slds-col slds-size_1-of-6">
26
27                      <br>
28
29                      <lightning-button-icon variant="neutral" icon-name="standard:search" alternative-text="Search"
30
31                          label="Search" onclick={handleClick}></lightning-button-icon>
32
33                  </div>
34
35              </div>
36
37          </div>

```

```

1  <?xml version="1.0" encoding="UTF-8"?>
2
3  <LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
4
5      <apiVersion>59.0</apiVersion>
6
7      <isExposed>true</isExposed>
8
9      <targets>
10
11          <target>lightning__RecordPage</target>
12
13          <target>lightning__AppPage</target>
14
15          <target>lightning__HomePage</target>
16
17      </targets>
18
19  </LightningComponentBundle>
20
21
22
23

```

## Key Scenarios

## 1. Property Inquiry and Client Requirement Management

- **Scenario:** Clients submit inquiries about available properties or specify their requirements for property searches.
- **Solution:** The CRM captures and organizes all client inquiries, storing preferences like location, budget, and property type. Automated workflows match client requirements to suitable properties, providing agents with recommendations for client follow-ups and reducing search time.

## 2. Automated Property Listing and Approval Process

- **Scenario:** Agents submit new property listings for review, which require approval before becoming available to clients.
- **Solution:** An automated approval process within the CRM handles new property listings, notifying agents when listings are approved or need revisions. This feature ensures only quality listings go live, streamlining review and maintaining listing standards.

## 3. Appointment Scheduling for Property Viewings and Consultations

- **Scenario:** Clients schedule appointments to view properties or discuss their property requirements with agents.
- **Solution:** The CRM's scheduling functionality manages all appointment details, including initial booking, rescheduling, and status tracking (e.g., scheduled, completed). Agents can efficiently organize viewings and consultations, improving client experience and communication.

#### **4. Deal Tracking and Transaction Management**

- **Scenario:** Clients initiate property transactions that require continuous updates and document handling.
- **Solution:** The CRM captures each transaction from initiation to closure, providing a central place to track deal progress, manage documents, and notify clients of status updates. This enables smooth transaction management and reduces the chance of missed updates.

#### **5. Reporting and Analytics on Client Engagement and Property Performance**

- **Scenario:** Management needs insights into client engagement trends, property performance, and transaction progress to make strategic decisions.
- **Solution:** The CRM's reporting and dashboard features generate real-time insights on metrics such as client inquiries, listing activity, and deal status. These analytics help the management team adjust strategies, forecast trends, and evaluate agent performance.

### **Conclusion**

#### **Summary of Achievements:**

The Nanmudhalvan CRM implementation successfully addressed core operational needs in client management, property listing, and transaction processing, creating an efficient and client-focused real estate service.

#### **1. Enhanced Client Engagement and Satisfaction:**

The CRM enables seamless handling of client inquiries, property searches, and viewings, providing a personalized and responsive experience that drives higher client satisfaction and loyalty.

## **2. Streamlined Property and Deal Management:**

With automated property listings and deal tracking, the CRM reduces manual effort for agents, speeds up the approval process, and ensures transactions are organized and transparent.

## **3. Data-Driven Decision Making:**

Real-time reports and dashboards support management in making informed decisions, understanding client preferences, and optimizing property inventory based on market demand.

## **4. Increased Operational Efficiency:**

The CRM's automation and centralized data structure allow agents to focus more on client service and relationship building, improving operational productivity.

Through these capabilities, the Nanmudhalvan CRM has positioned the business to manage client relationships, property listings, and deals more effectively, supporting growth and enhancing overall service quality.