A CRM Application to Manage the Booking of Co-Living

Abstract:: Our co-living space project fostersan inclusive communitywhere individuals can live, work, and connect. The space offers a balance of private and communal areas, encouraging collaboration and reducing isolation. The application allows users to select AC rooms with multiple sharing options, choose daily special food items, make payments through various modes, and provide feedback on serviceslike room cleaning, internetconnection, and food.

Features and Functionality:

1.Customer Management:

i. **Customer Registration:** Users can registerthemselves by providingpersonal details such asname, email, phone number, and address.

ii. **Customer Profile:** A user profile will be created to store customer information, bookinghistory, and payment details.

2.Room Booking:

i. **Room Selection:** Users can browse and select from different ACrooms with multiple sharing options (e.g., single, double, triple sharing).

ii. **Room Availability:** The application will display the availability of eachroomtype in real-time.

iii. **Booking:** Users can book a room by selecting the desired room type, check-in and check-out dates, and number of occupants.

3.Food Services

a. **Food Menu:**A menu of special food items will be available for users toselect from.

b. **Daily Food Selection:** Users can select food items for each day of theirstay.

4 .Payment Management:

a. **Payment Options:**Users can make payments using various modes such as credit/debit cards, net banking, or wallets.

b. **Payment History:**A record of all payments made by a user will be storedin their profile.

5.Feedback and Review:

a. **Service Feedback:**Users can providefeedback on various servicessuch asroom cleaning, internetconnection, food quality,and overall experience.

b. **Rating System:**Users can rate their experience on a scale of 1-5.

6.Reporting and Analytics

a. **Booking Reports:** The application will generate reports on room bookings, occupancy rates,and revenue.
b. **Customer Insights:** The application will provide insightson customerbehavior, preferences, and feedback.

7.Security and Access Control

c. **User Authentication:** Users will be authenticated using a secure loginsystem.
d. **Role-Based Access:** Administrators will have access to manage bookings,customer data, and reports.

8. Functionality

i. **Search and Filter:** Users can search for available rooms by date, roomtype,and sharing options.
ii. **Booking Confirmation:** Once a bookingis made, the user will receive a confirmation email with details of their booking.
iii. **Payment Reminders:** The application will send reminders to users for pendingpayments.
iv. **Feedback Notifications:** The application will send notifications toadministrators when a user provides feedback.
v. **Reporting and Analytics:** The application will generate reports andprovide insights on customer behaviorand preferences.

Milestone 1 - Introduction to Salesforce:

What is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service,market, analyze, and connectwith your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engagewith employees and partners, and store your data securelyin the cloud.

Milestone 2 – Object

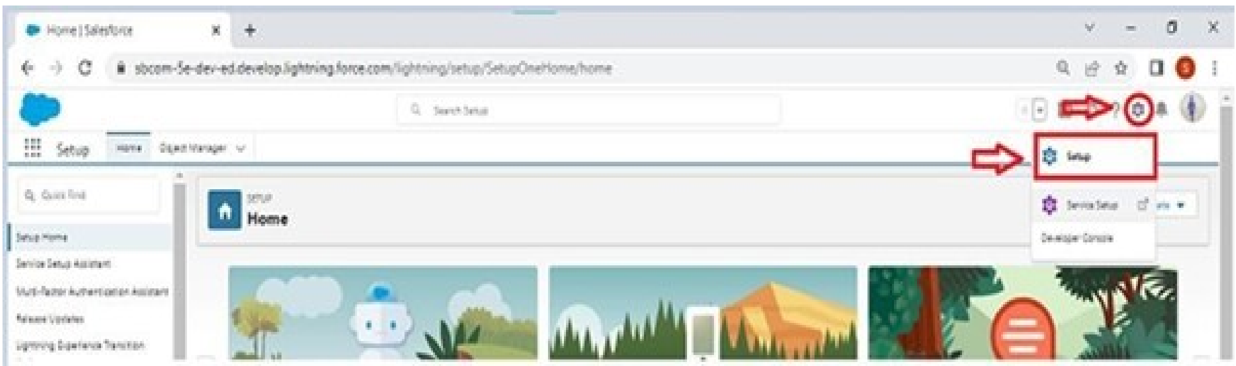
What Is an Object?

Salesforce objects are database tables that permityou to store data that is specificto anorganization. What are the types of Salesforce objects?

Salesforce objects are of two types:

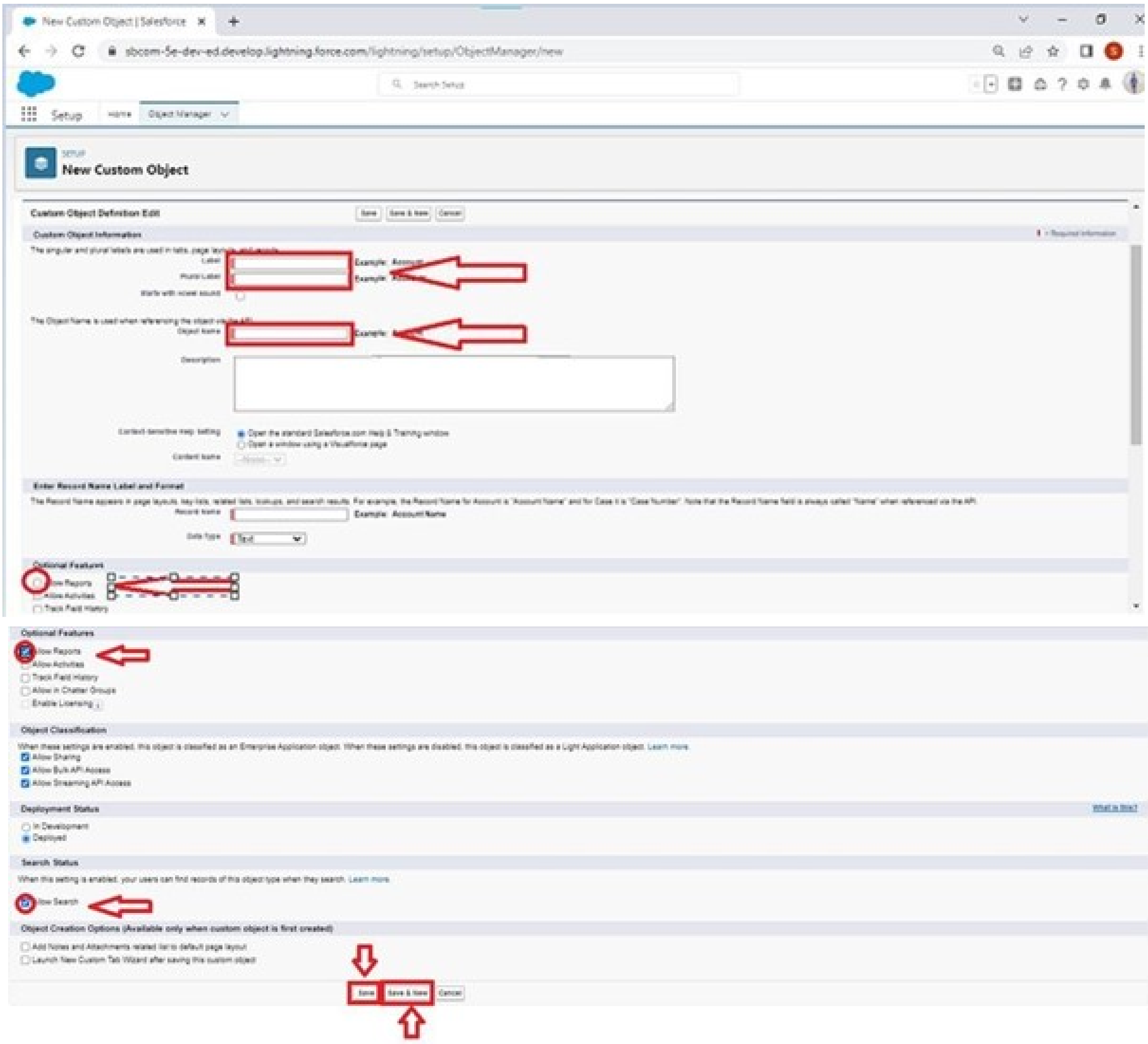
1.standard Objects: Standard objects are the kind of objects that are provided bysalesforce.com such as users,contracts, reports, dashboards, etc.

2.Custom Objects: Custom objects are objectscreated by users.They supply information that is unique and essential to their organization. They are the heart of any application and providea data-sharing structure.



1.From the setup page ? Click on ObjectManager ? Click on Create ? Click on CustomObject.

1. On the Customobject defining page:
2. Enter the labelname, and plural label name, click on Allow reports, and Allow search.



4.Click on Save.

Milestone 3 - Tabs

What is Tab : A tab is like a user interface that is used to build records for objects and to viewthe records in the objects.

Types of Tabs:

1. **Custom Tabs :**

   Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
2. **Web Tabs :**

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window.Web tabs make it easierfor your users to quicklyaccess content andapplications they frequently use without leaving the salesforce.com application.

3. **Visualforce Tabs :**

   Visualforce Tabs are custom tabs that displaya Visualforce page.Visualforce tabs look andbehavelike standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. **Lightning Component Tabs :**

   Lightning Component tabs allow you to add Lightning components to the navigation menuin Lightning Experience and the mobile app.

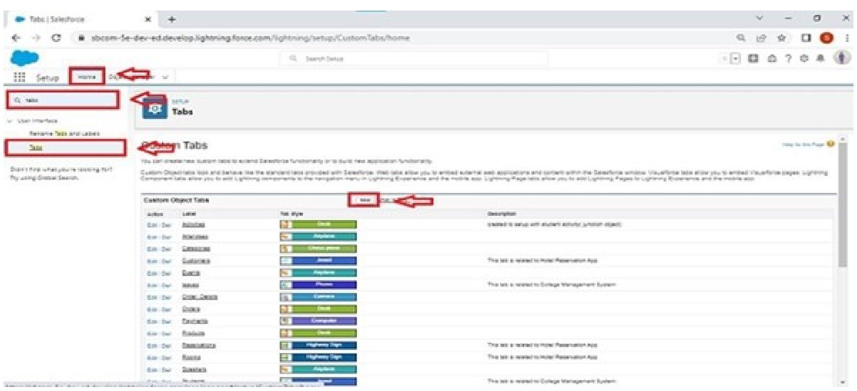
5. **Lightning Page Tabs :**

   Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

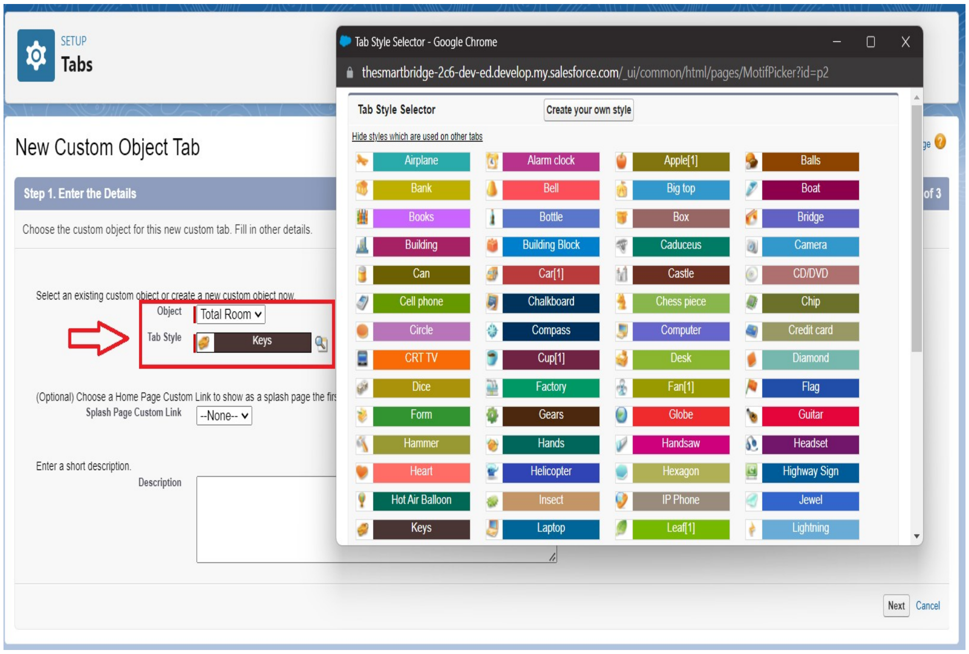
Activity 1: Creatinga Tab for Total Rooms

To createa Tab:(Total Rooms)

1. Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom objecttab)



2Select Object(Total Rooms)> Select the tab style.

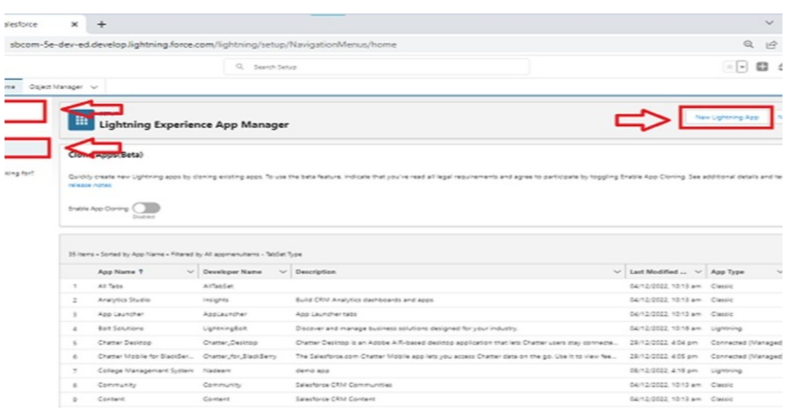


3. Next (Add to profilespage) keep it as default
4. Next (Add to CustomApp) keep it as default& Save.

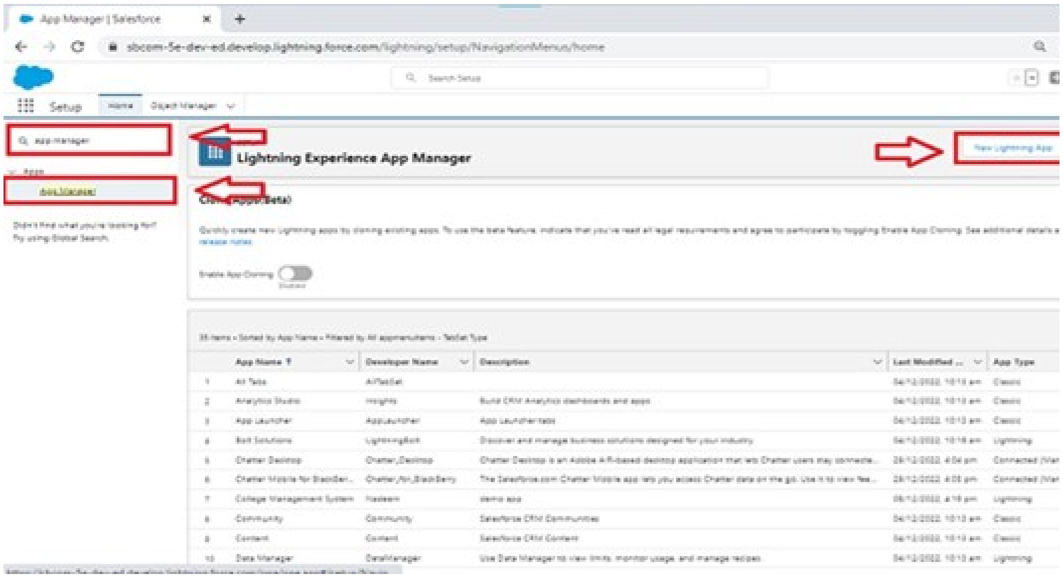
Milestone 4 - The LightningApp

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightningapps give your users access to sets of objects,tabs, and other items all inone convenient bundle in the navigation bar.
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

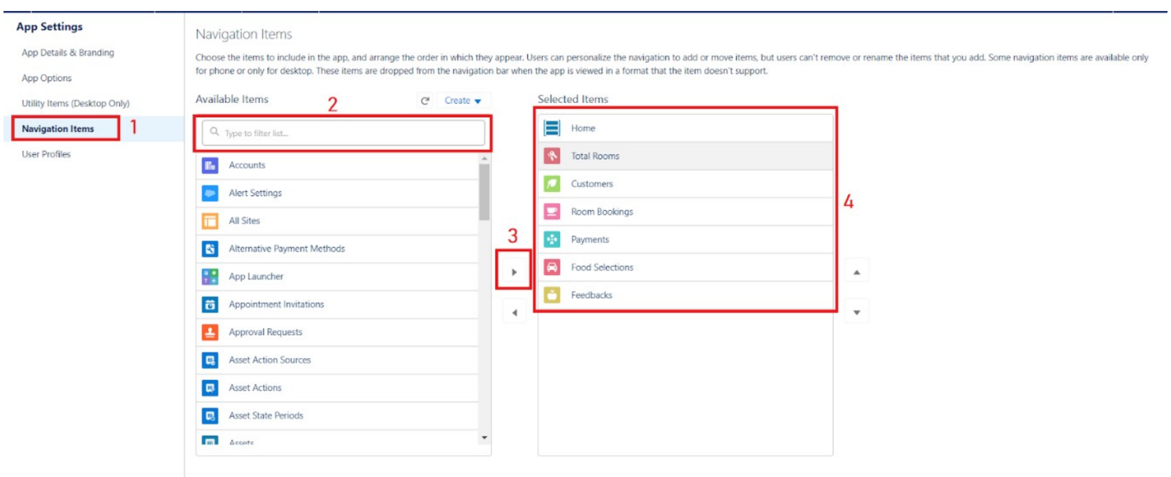
Activity 1: To create a lightningapp page:



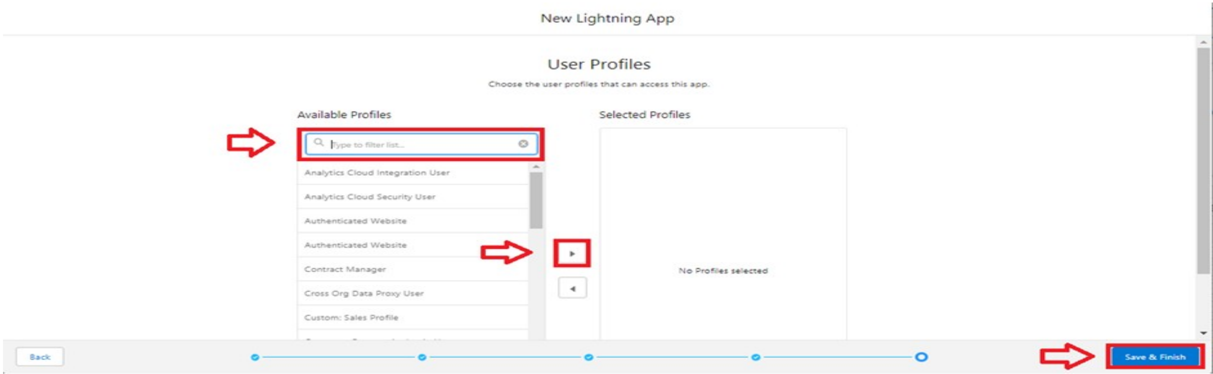
1.Go to setup page > search“app manager” in quickfind > select “app manager” > click on Newlightning App.



1. To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers1, Room Booking, Payments1, Food selection, Feedbacks, Reports and Dashboards) from the search bar and move it using the arrow button > Next.



1. To Add UserProfiles:



2. Search profiles (System administrator) in the searchbar > click on the arrow button > save &finish.

Milestone 5 – Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuableinformation that you require for a specificobject. Hence,the overall searching, deletion, and editing of the records becomesimpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can’t simplydelete a StandardField untilit is a nonrequired standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find commonin every Salesforce application. They are,

1.CreatedBy

2.Owner

3.Last Modified

4.FieldMade During objectCreation

Custom Fields:

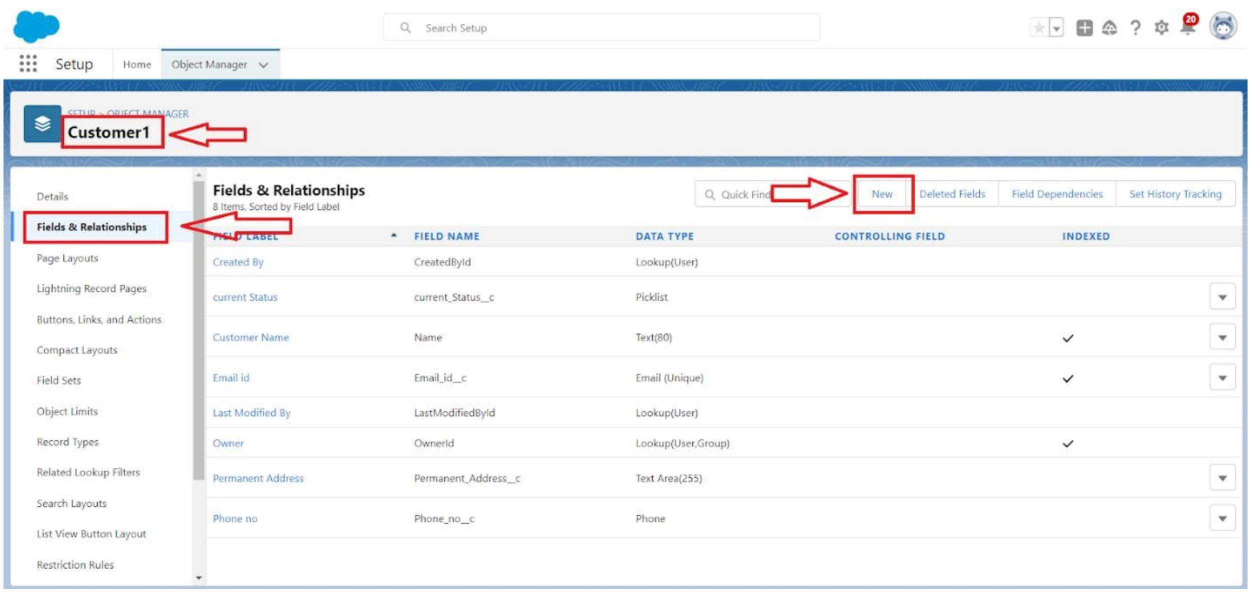
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. Itmeans you need not always include them in the records, unlike Standard fields. Hence, the final decision dependson the user, and he can add/remove CustomFields of any given form.

Activity 1: Creation of fields for the customer1 object

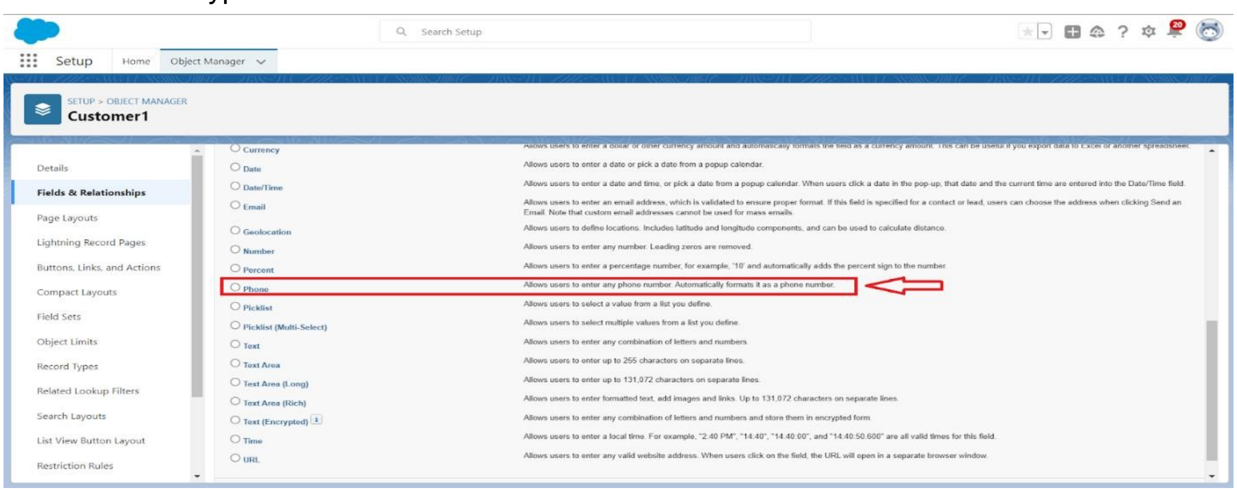
1. To create fieldsin an object:

1. Go to setup > click on Object Manager> type object name(Customer1) in search bar > clickon the object.

2. Now clickon “Fields & Relationships” > New



1. Select Data Type as a “Phone”



2. Click on next

1. Fillthe Above as following:
    a. Field Label:Room Sharing
    b. Value - Select entervalues with each value separated by a new line

1. Single sharing
2. Double sharing
3. Triple sharing

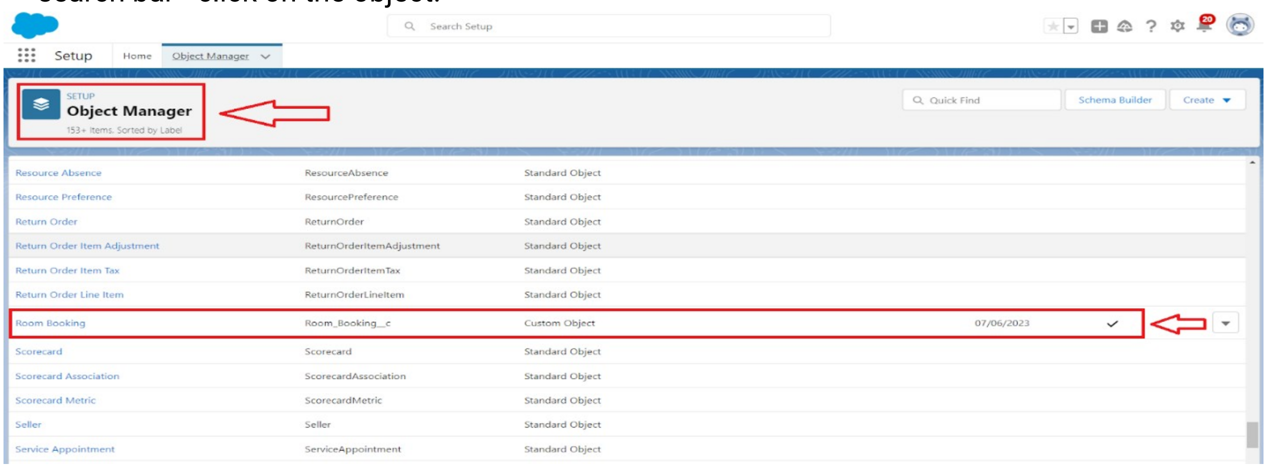
- Select required

- Click on Next > Next > Save and new.

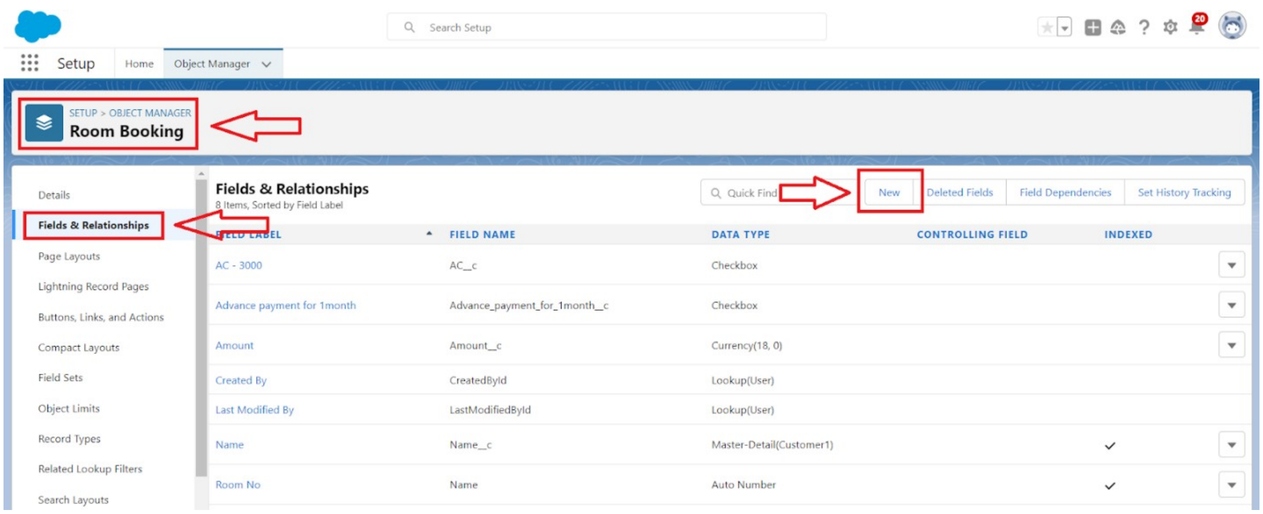
2. To Create a Fields & Relationship to an Room Booking Object

To createfields & relationship to an object:

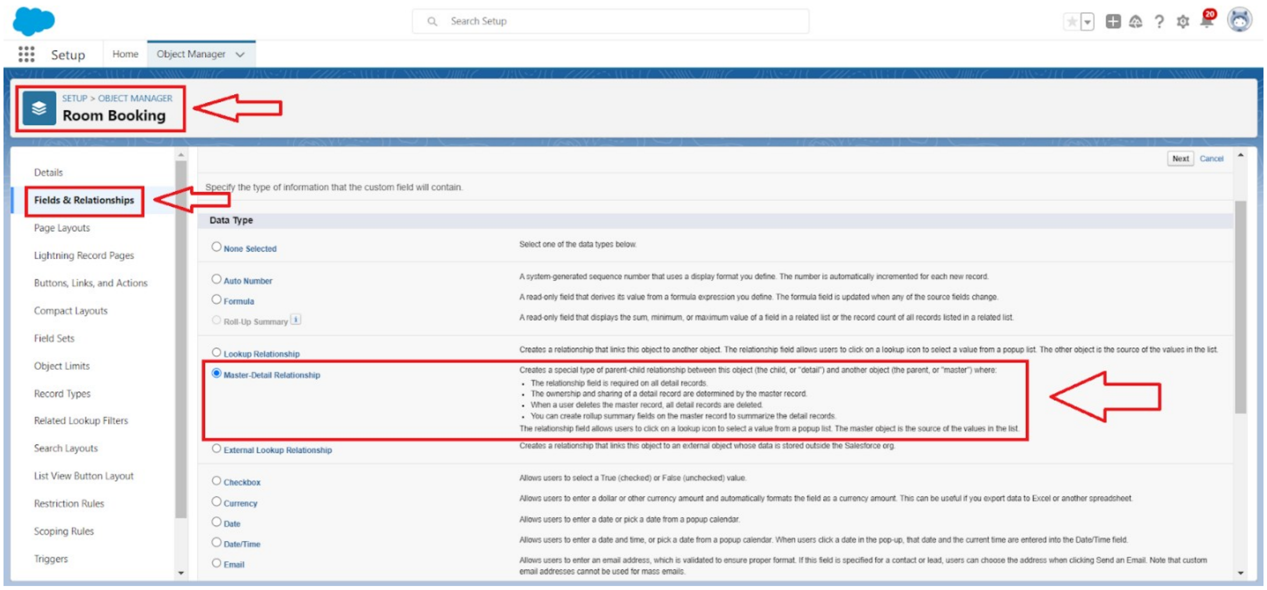
1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.



Now clickon “Fields &Relationships” > New



1. Select Data Type as a “Master-detail Relationship”
2. Click on Next

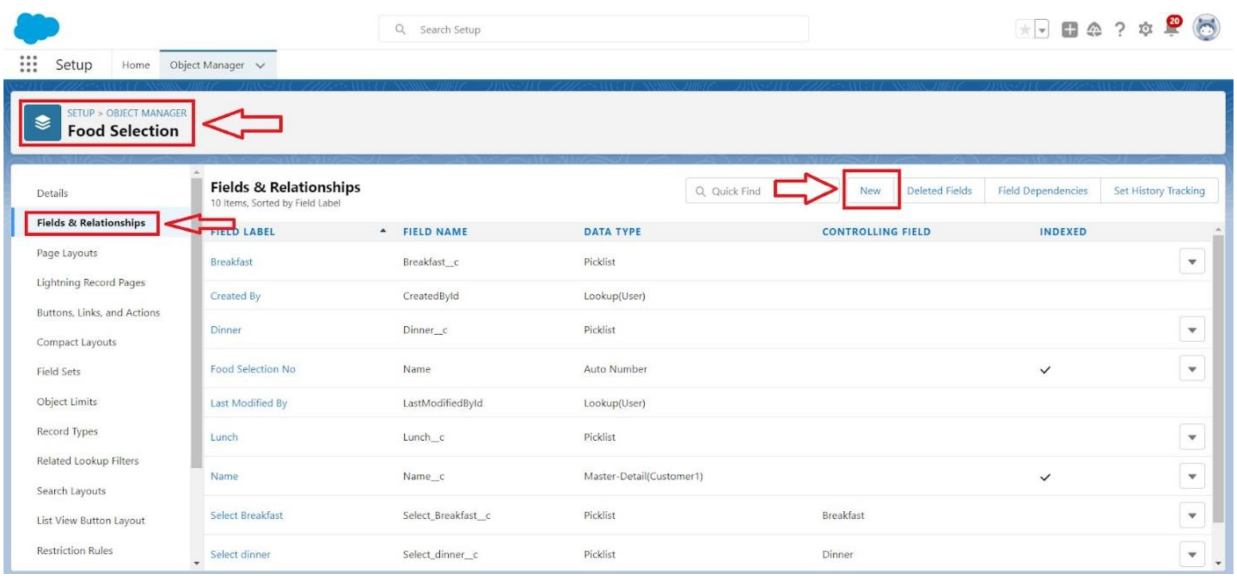


3. Click on the Related to drop down and Selectthe “Customer1” object and click on Next

Creation of fields for the Food Selection object

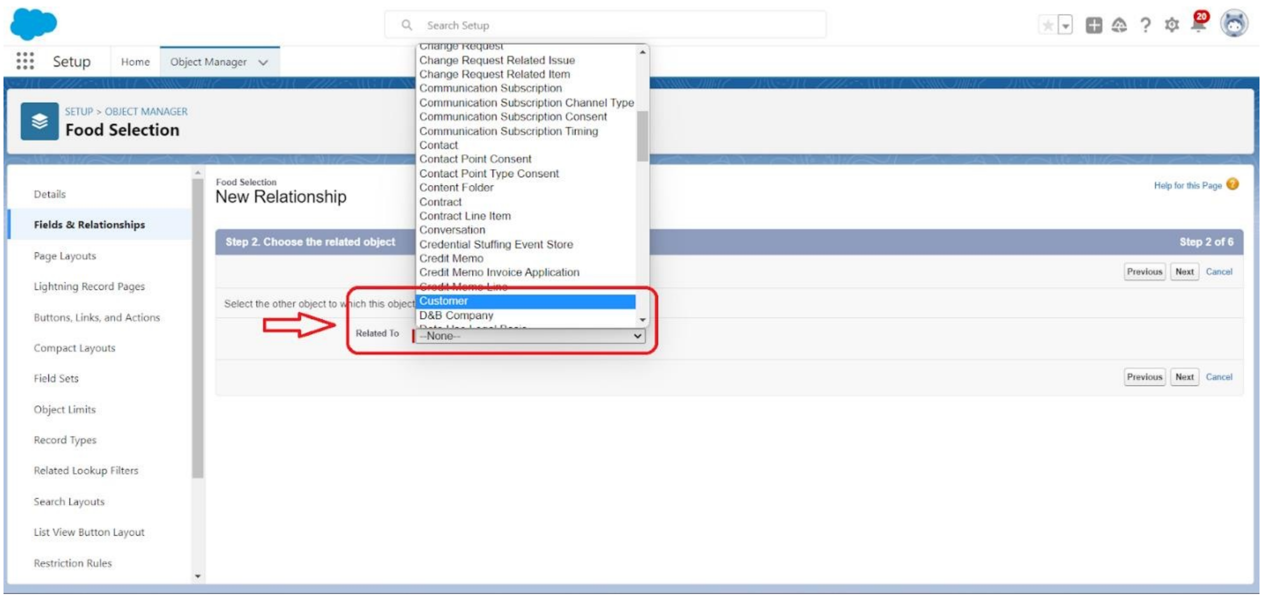
1. To create fields& relationship to an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > clickon the object.
2. Now click on “Fields& Relationships” > New



3. Select Data Type as a “Master-detail Relationship”
4. Click on Next

5. Click on the Related to drop down and Select the Customer1object and clickon Next



1. Fill theAbove as following:

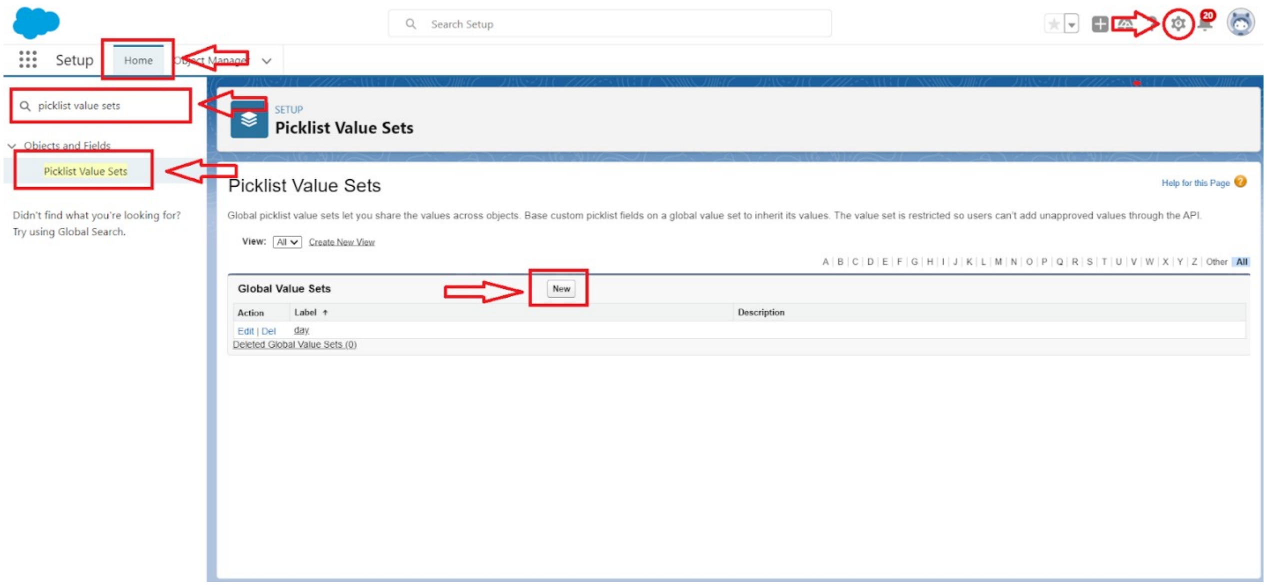
- Change the Field Label:Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

Picklist value sets:

Global picklist value sets let you share the values across objects. Base custom picklist fields on a globalvalue set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

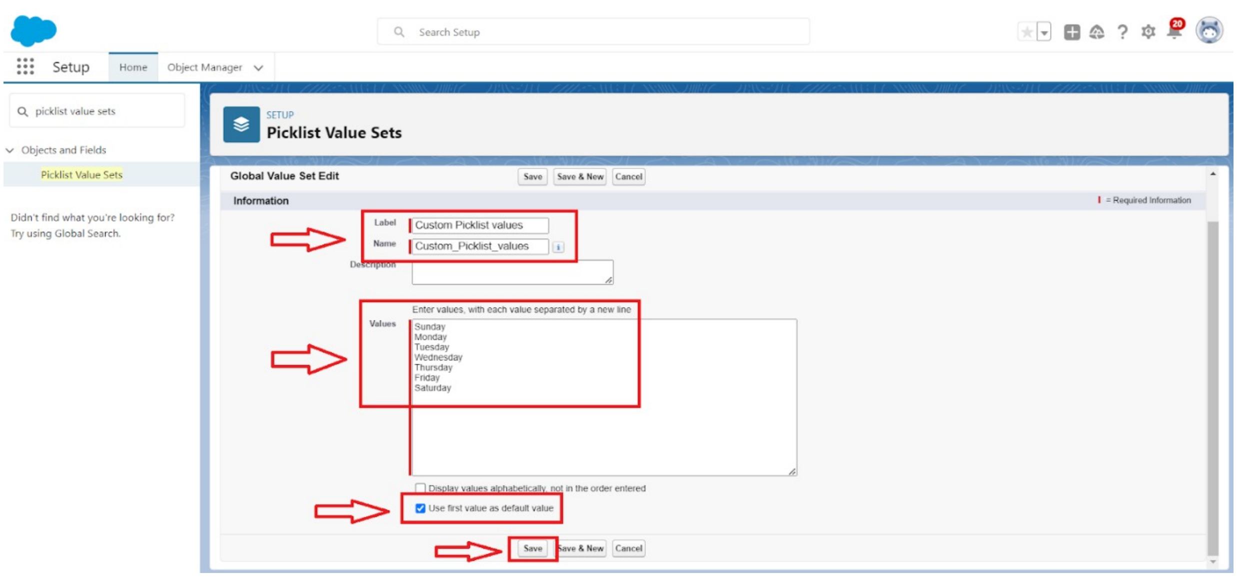
Create a picklist value set:

1. Firstclick on gear icon and click on setup
2. Click on home tab in the Quick find box search for the " Picklistvalue sets "
3. Click on the Picklist value set and clickon new



4. Enter theLabel name and API name automatically Generate
5. Enterthe values with each value separated by a new line

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

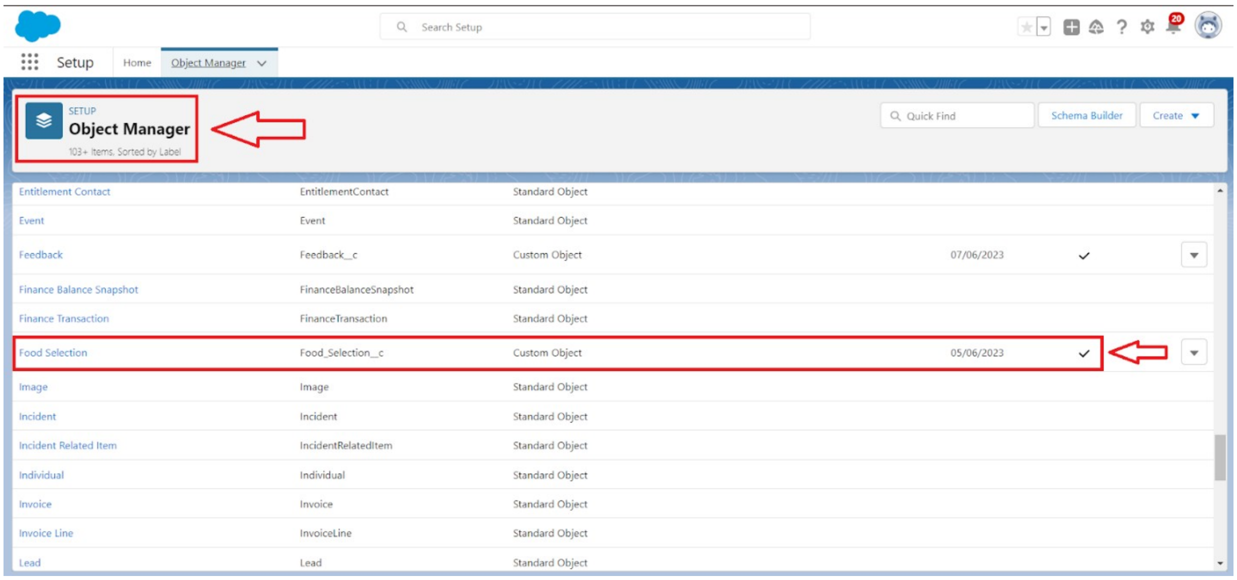


6. Check the Use first value as defaultvalue and Click on save.

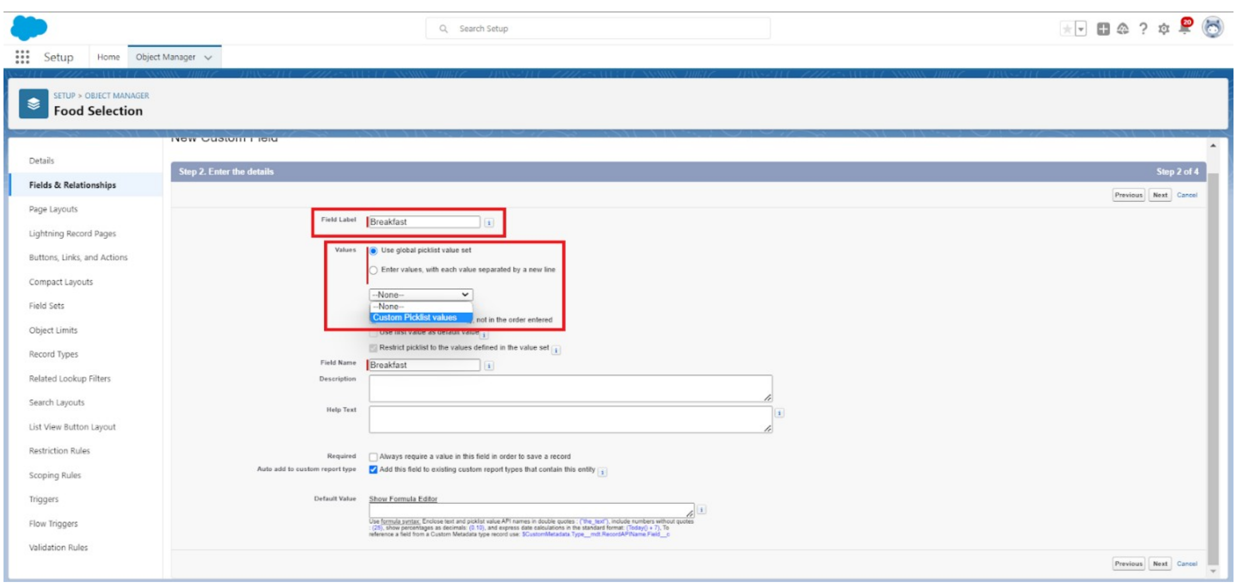
2. Createa picklist Fieldfor Food selection object

To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > clickon the object.



1. Now click on “Fields& Relationships” > New
2. Select Data Type as a “Picklist”



3. Fill theAbove as following:

- Field Label: Breakfast
- Under Value - Selectthe Use global picklist valueset

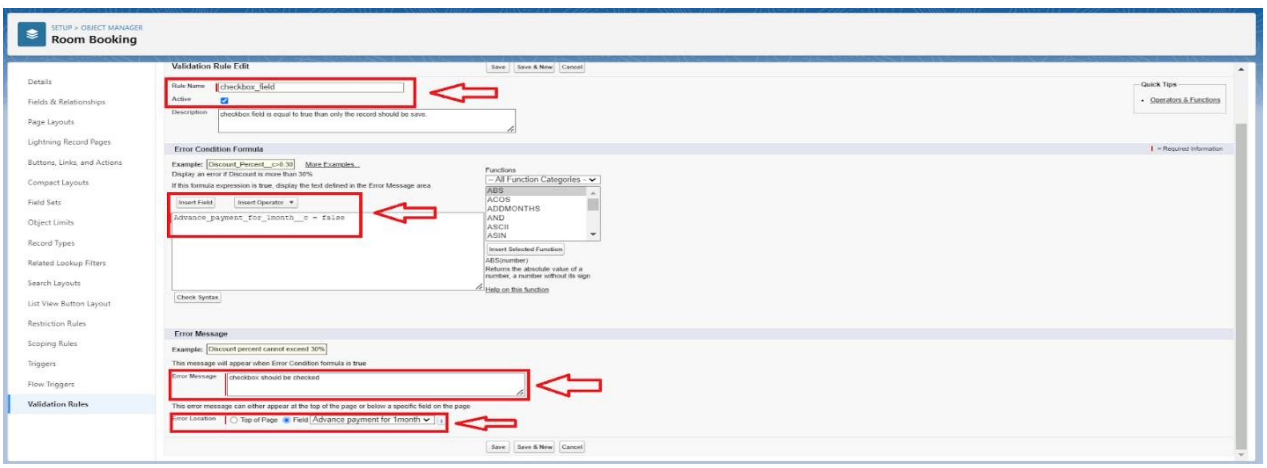
- Under the drop down select the Custom PicklistValues
- Select required
- Click on Next > Next > Save and new.

Validation rule

Validation rules are applied when a user tries to save a record and are used to check if the data meetsspecified criteria. If the criteriaare not met, the validation rule triggers an error messageand preventsthe user from saving the record until the issues are resolved.

createa validation rule to an Room BookingObject

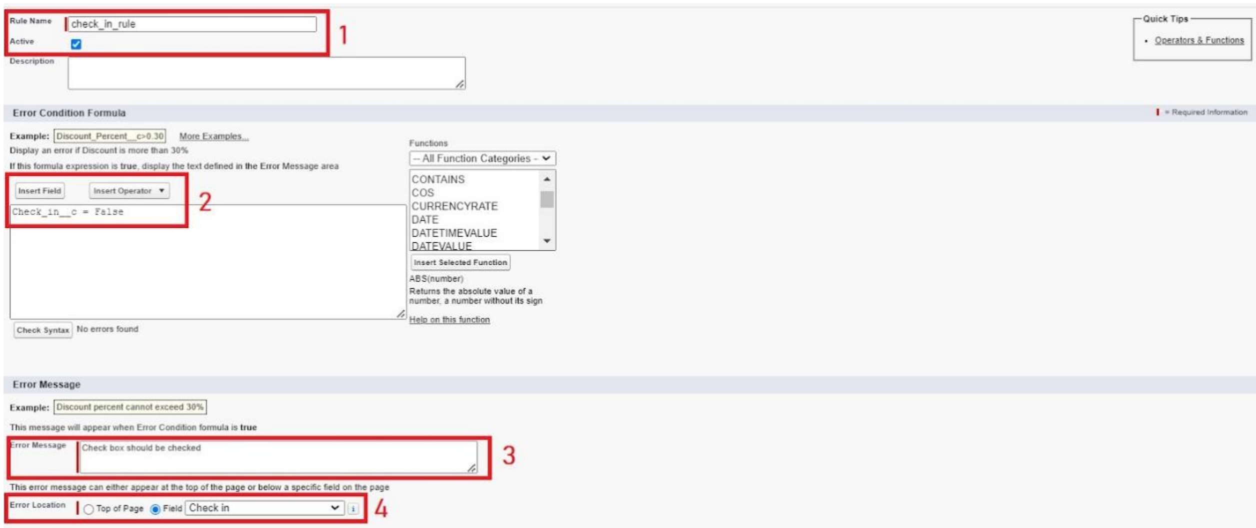
1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.
2. Now clickon "Validation rule" at top > New.
3. EnterRulename "checkbox field" and make the validation should beActive.
4. Enter the formula in the formula Box "Advance_payment_for_1month_c = false" and check forsyntax error.
5. Enter the error message"Checkbox should be checked"
6. Select error locationas field(Advance paymentfor 1month)



7. Click on save.

create a Another validation rule to an Room BookingObject

1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.
2. Now click on "Validation rule" at top > New.
3. EnterRulename "check in rule"and make the validation should be Active.
4. Enter the formulain the formula Box " Check_in__c = False " and check for syntaxerror.
5. Enter the errormessage "Check box should be checked"
6. Select error location as field(Check in)



7. Click on save.

Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours &Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. **Standard profiles:**

By defaultsalesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannotdeleted standard ones

Each of thesestandard ones includesa default set ofpermissions for all of the standardobjects available on theplatform.

2. **Custom Profiles:**

Custom ones defined by us.

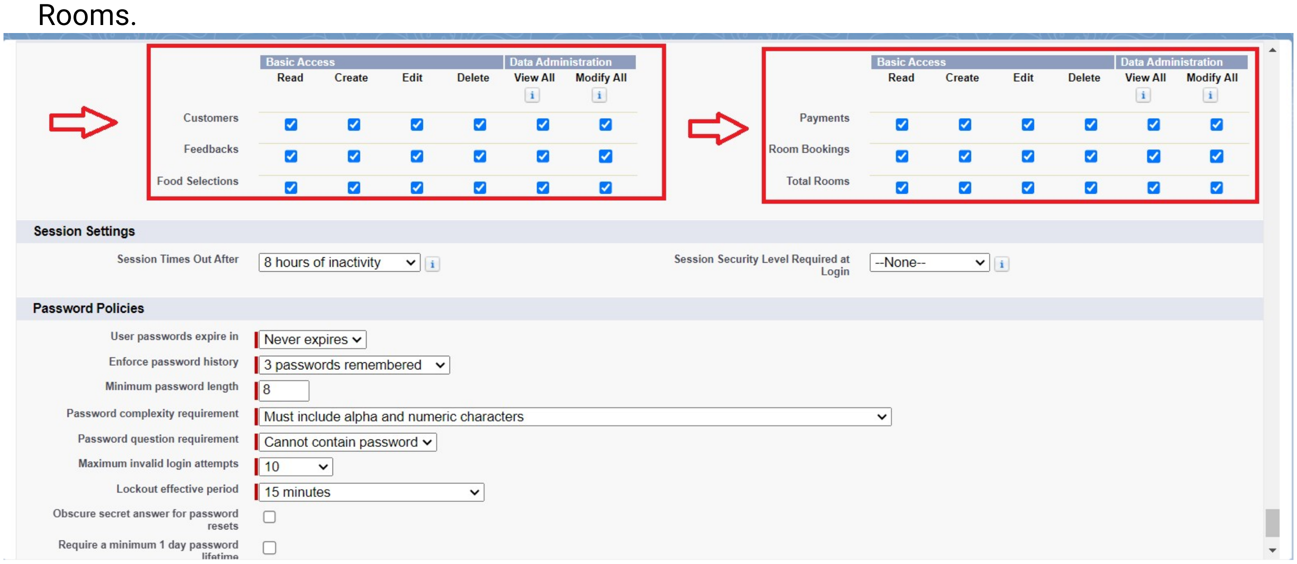
They can be deletedif there are no usersassigned with that particular one.

Customuser Profile

To createa new profile:

1. Go to setup > type profilesin quick find box> click on profiles > clone the desired profile(Standard User)
2. Enter profile name (Custom User)> Save.

3. While still on the profilepage, then clickEdit.
4. Scroll down to Custom Object Permissions and Give All access permissions for Customers,Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

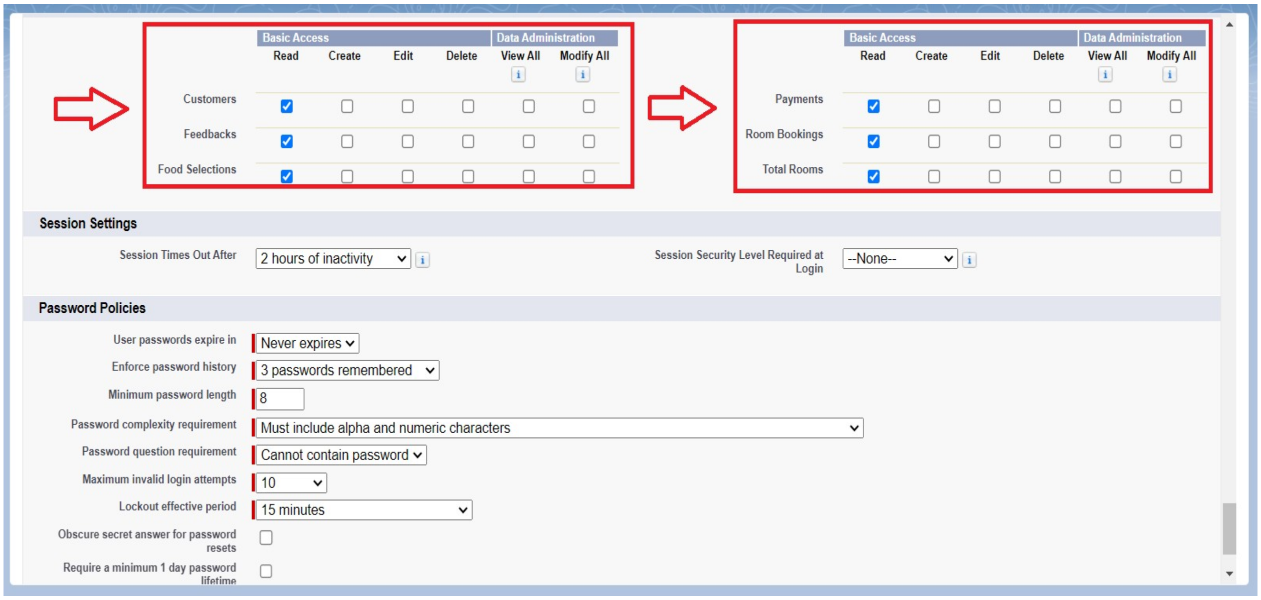


5. Scroll down and Clickon Save.

Custom platformuser1

To create a new profile:

1. Go to setup > type profilesin quick find box > click on profiles > clone the desired profile(Standard platform User)
2. Enter profile name (Custom platformUser1) > Save.
3. While still on the profilepage, then clickEdit.
4. Scroll down to Custom Object Permissions and Give only Read access permissions forCustomers, Feedbacks, Food selections, Payments, Room Bookingsand Total Rooms.

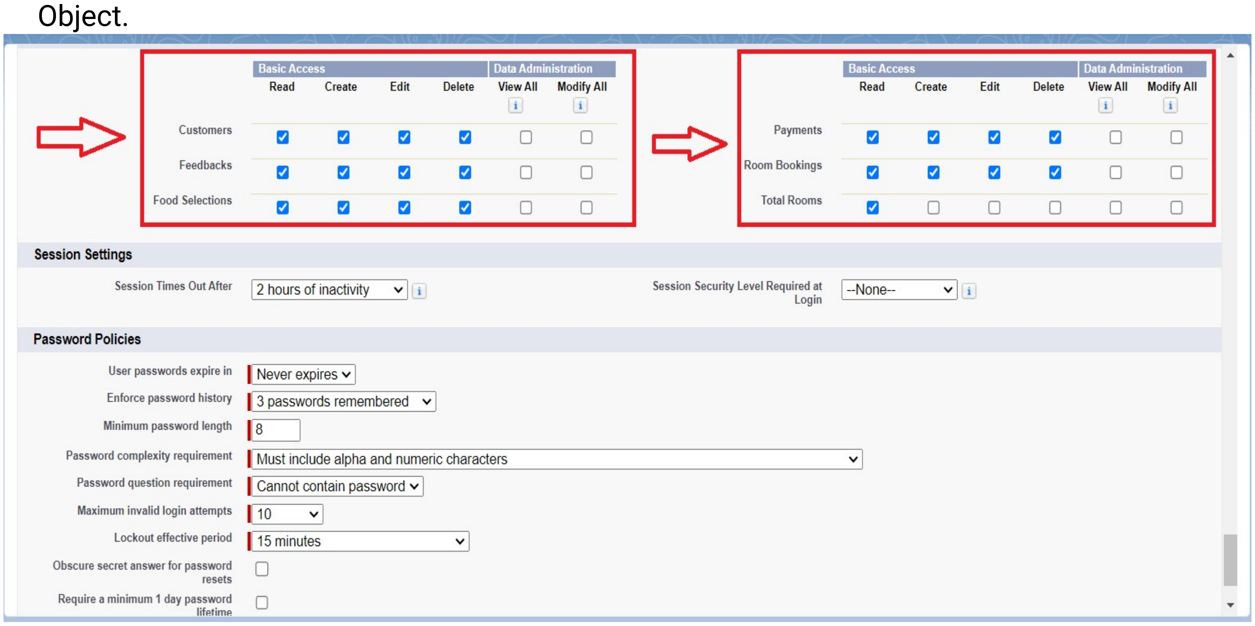


5. Scroll down and Clickon Save.

Customplatform user2

To create a new profile:

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile(Standard platform User)
2. Enter profile name (Custom platformUser2) > Save.
3. While still on the profilepage, then clickEdit.
4. Scroll down to Custom Object Permissions and Give Create, Read, Edit and Delete access permissions for Customers, Feedbacks, Food selections, Payments and Room Bookings. AndRead Access permission for Total Rooms Object.



5. Scroll down and Clickon Save.

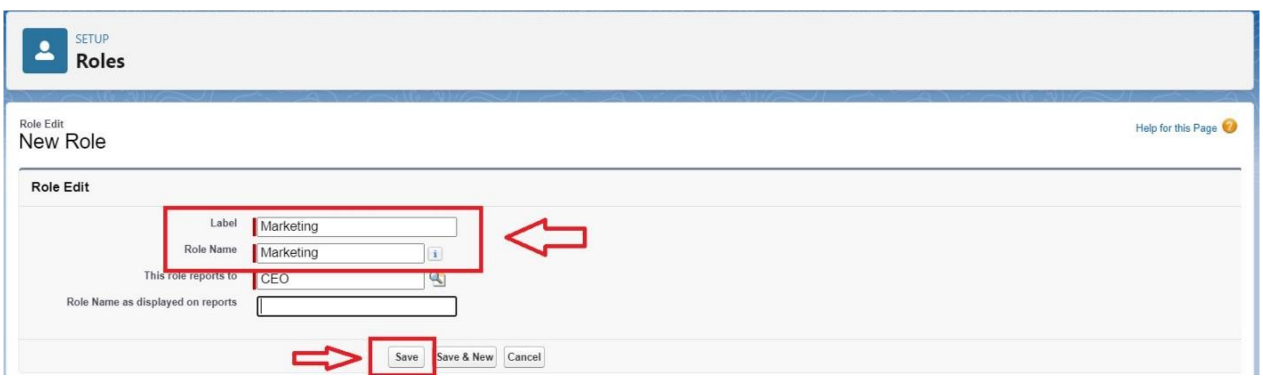
Roles

A role in Salesforce defines a user'svisibility access at the recordlevel. Roles may be used to specifythe types of access that people in your Salesforce organization can have to data. Simply put, it
describes what a user could see within the Salesforce organization.

Marketing Role

1.Go to quick find > Search for Roles > click on set up roles.2.Click on Expand All and clickon add role under CEO role.

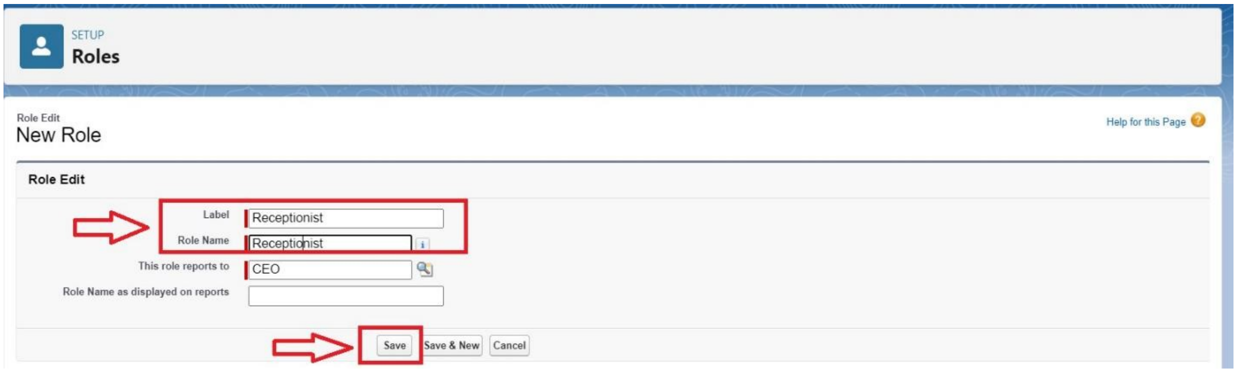
1. Give Label as “Marketing” and Role name gets auto populated.



2. Then click on Save.

Receptionist Role

1. Go to quick find > Search for Roles > click on set up roles.
2. Click on ExpandAll and click on add role under CEO role.
3. Give Label as “Receptionist” and Role name gets auto populated.



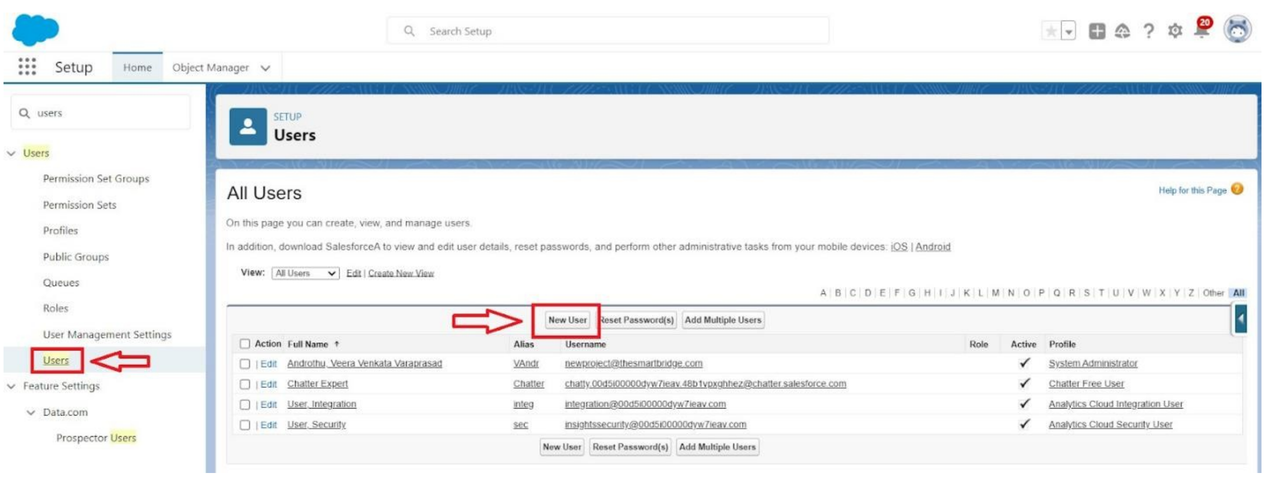
4. Then click on Save.

Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Create User

1. Go to setup > type users in quickfind box > select users> click New user.



2. Fill in the fields

    a. First Name : sandeep

b. Last Name : gujja

c. Alias : Give a Alias Name

d. Email id : Giveyour Personal Email id

e. Username : Username should be in thisform: text@text.com

f. Nick Name : Give a Nickname

g. Role : CEO

h. User licence : Salesforce

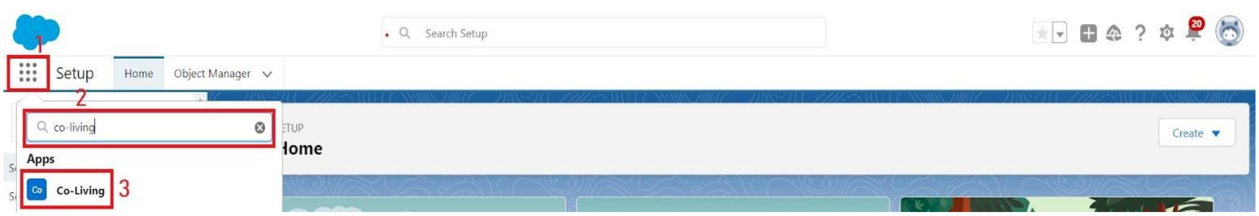
i. Profiles : Customuser

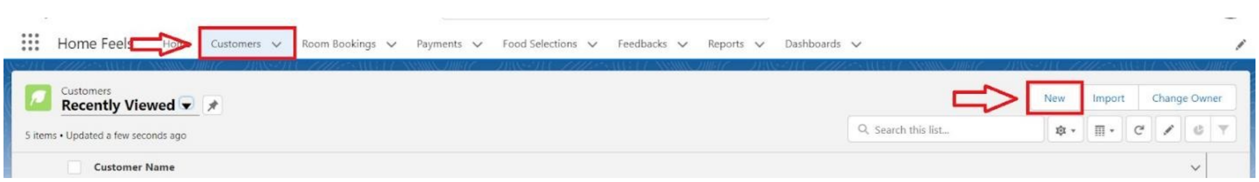
User Adoption

Create a Record (Customers)

1.Click on App Launcher on the left side of the

screen.2.Search Home Feels & click on it.





3.Click on the

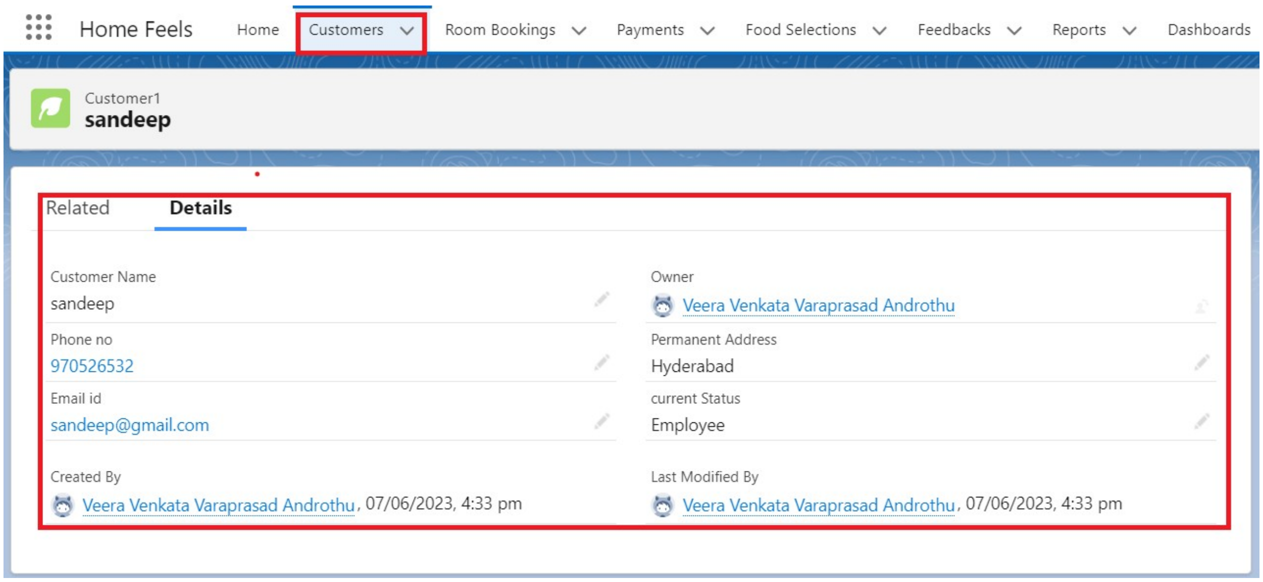
Customers Tab. 4.Click

new and fill details &

Save**View a Record**

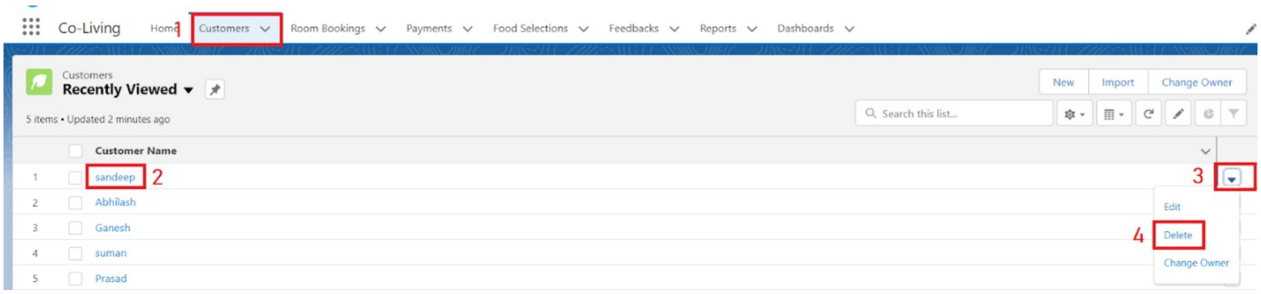
(Customers)

1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on CustomerTab.
4. Click on anyrecord name. you can see the details of the Customer.



Delete a Record(Customers)

1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on the Customers Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click deleteand delete again.

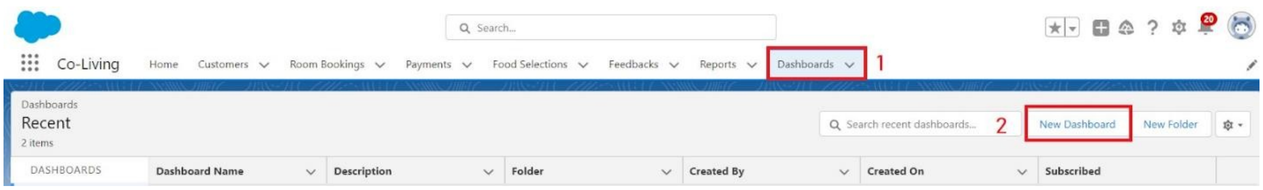


Dashboards

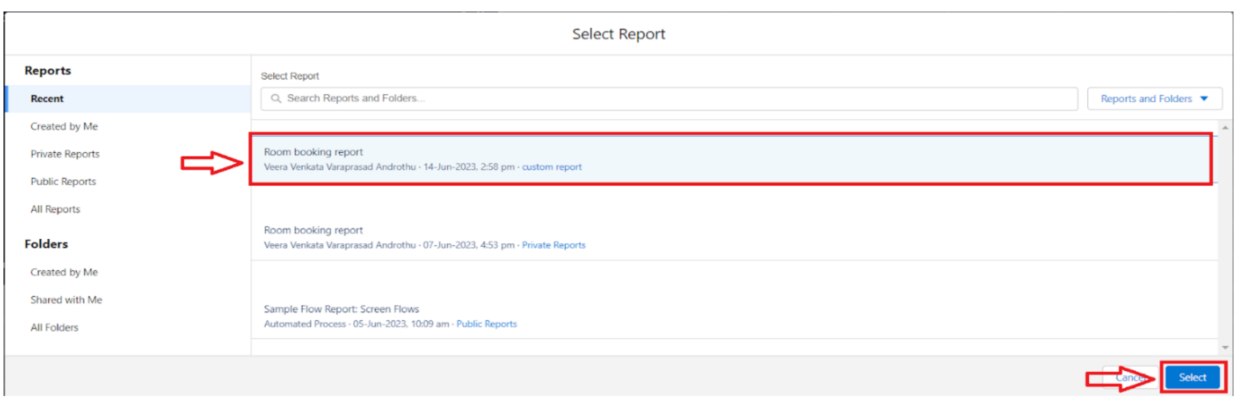
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gatheredwith reports. Use dashboards to help users identify trends,sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, reviewthese dashboard basics.

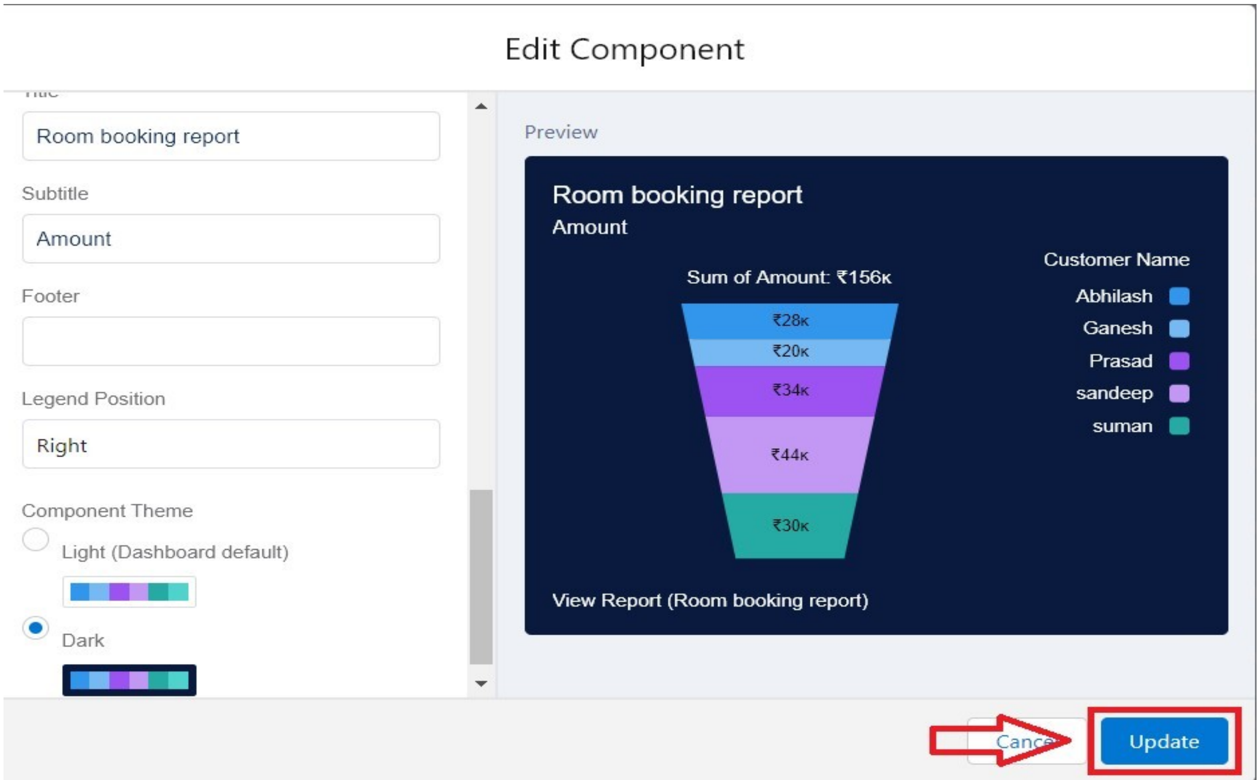
Create Dashboard

1. Go to the app > click on the Dashboardtabs and click on new Dashboard



2. Give a Name and click on Create.
3. Select add component.
4. Select a ReportCustomer with Room Booking and click on select.





5. Click Add then click on Save and then click on Done.

Create Another Dashboard

1. Go to the app > click on the Dashboardtabs and click on new Dashboard.
2. Give a Name and clickon Create.
3. Select add component.
4. Select a ReportCustomer with Room Booking with Payments and click on select.
5. Click Add then click on Save and then click on Done.

Flows

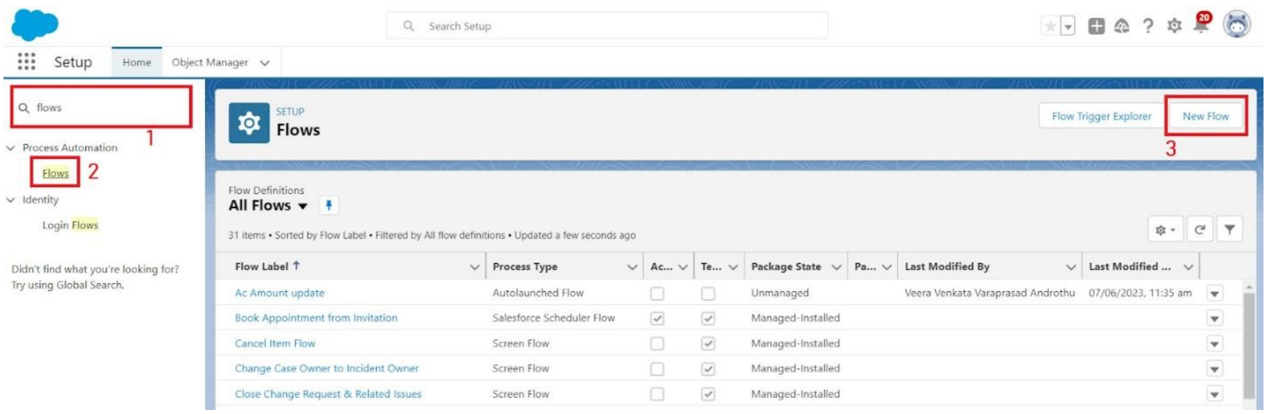
In Salesforce, a flow is a powerfultool that allowsyou to automate business processes, collect and updatedata, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Why do weneed to create a flow:

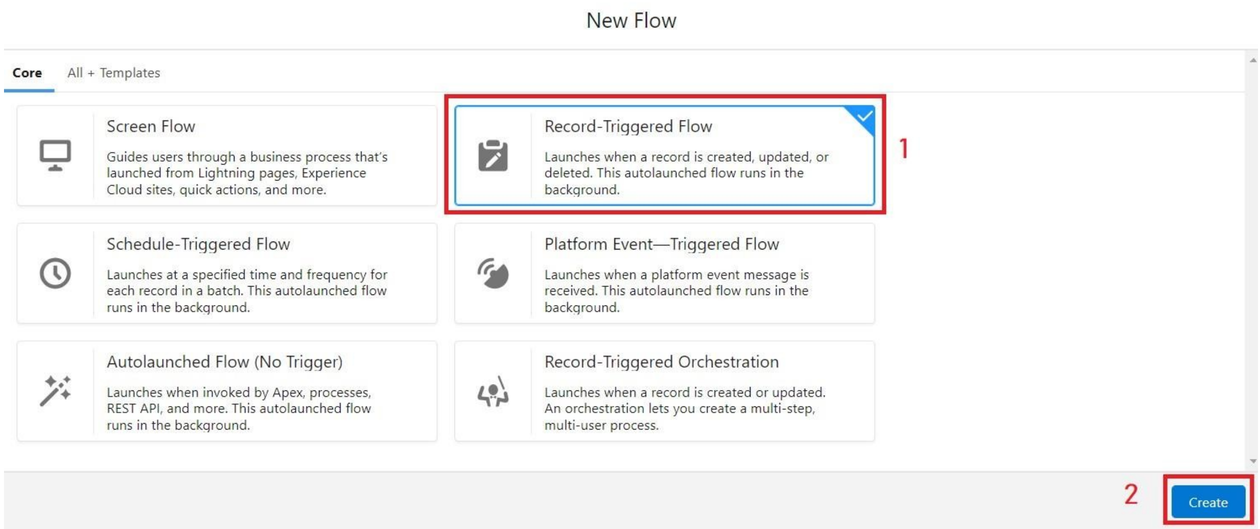
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

Create a Flow

1. Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.



2. Select the Record-triggered flow andClick on Create.



3. Select the Object as a Room Booking in the Drop

   down list. 4.Select the Trigger Flow when: “A

   record is Created or Updated”.

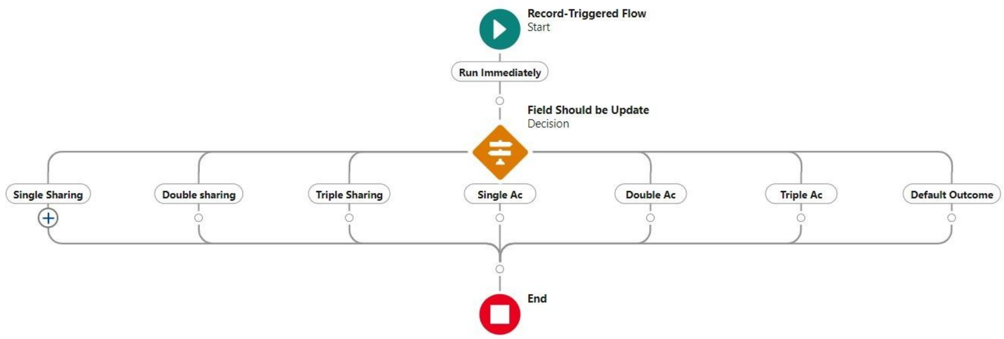
1. Select the Optimize the flow for: “Actions and Related Records”and Click on Done.

2. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “DecisionElement”.

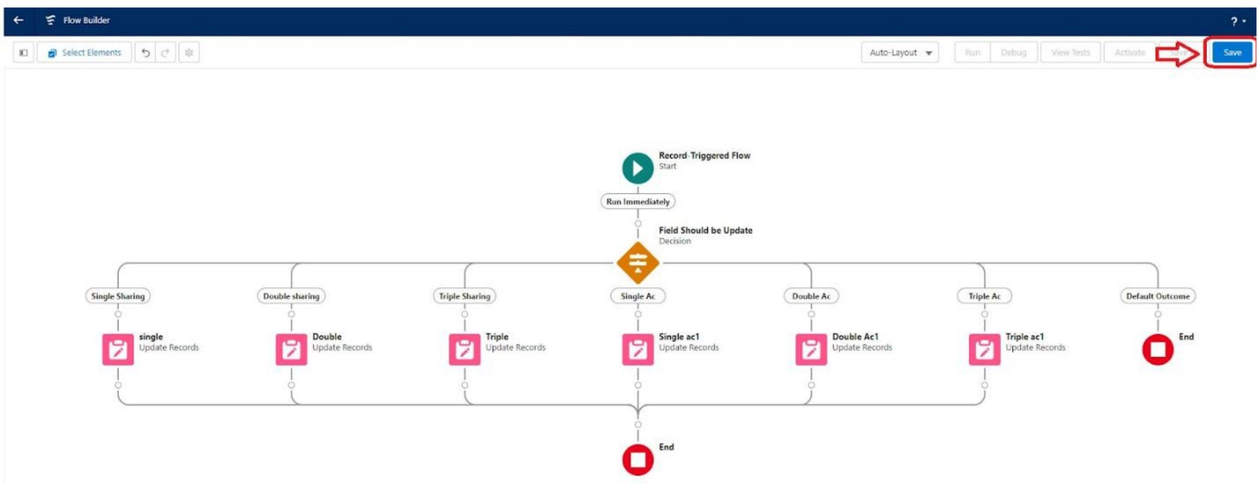
3. Enter the DetailsLabel: Field should be Update, API name: Gets Automatically Generated.

4. Enter the OutcomeDetails Label: Singlesharing, Outcome API name: Gets Automatically

Generated.



1. The Flow will Form like This andClick on save.



2. Enter the Flow Label: Update Amount Field, Flow API Name: Gets Automatically GeneratedandClick on Save.

Conclusion:

The CRM application for managing bookings in your co-living space is an essential tool to streamline and enhance the customer experience. It will allow you to efficiently manage and store customerdetails, enabling residents to easilychoose from differentair-conditioned rooms with multiple sharing options. The platform will also enable users to select special food items on a daily basis, catering to their individual preferences. Additionally, the application will support multiple payment modes,ensuring flexibility and conveniencefor residents.