

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 insights on customer behavior, preferences, and feedback.

7. Security and Access Control

- c. **User Authentication:** Users will be authenticated using a secure login system.
- 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, room type, and sharing options.
- ii. **Booking Confirmation:** Once a booking is made, the user will receive a confirmation email with details of their booking.
- iii. **Payment Reminders:** The application will send reminders to users for pending payments.
- iv. **Feedback Notifications:** The application will send notifications to administrators when a user provides feedback.
- v. **Reporting and Analytics:** The application will generate reports and provide insights on customer behavior and preferences.

Milestone 1 - Introduction to Salesforce:

What is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with 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 engage with employees and partners, and store your data securely in the cloud.

Milestone 2 – Object

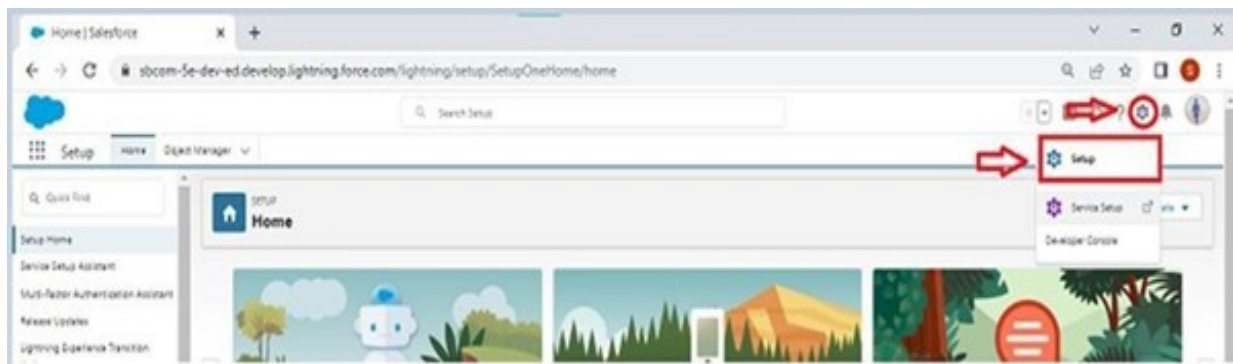
What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. 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 by salesforce.com such as users, contracts, reports, dashboards, etc.

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



1. From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.



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

The screenshot shows the 'New Custom Object' setup page in Salesforce. Red annotations highlight several key areas:

- Custom Object Information:** Red boxes and arrows point to the 'Label' field (with an example 'Account'), the 'Plural Label' field (with an example 'Accounts'), and the 'Object Name' field (with an example 'AccountName').
- Optional Features:** A red circle highlights the 'Use Reports' checkbox, which is checked. A red arrow points to the 'Allow Reports' checkbox in the expanded section.
- Search Status:** A red circle highlights the 'Use Search' checkbox, which is checked. A red arrow points to it.
- Bottom Buttons:** Red arrows point to the 'Save' and 'Save & New' buttons at the bottom of the page.

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 view the records in the objects.

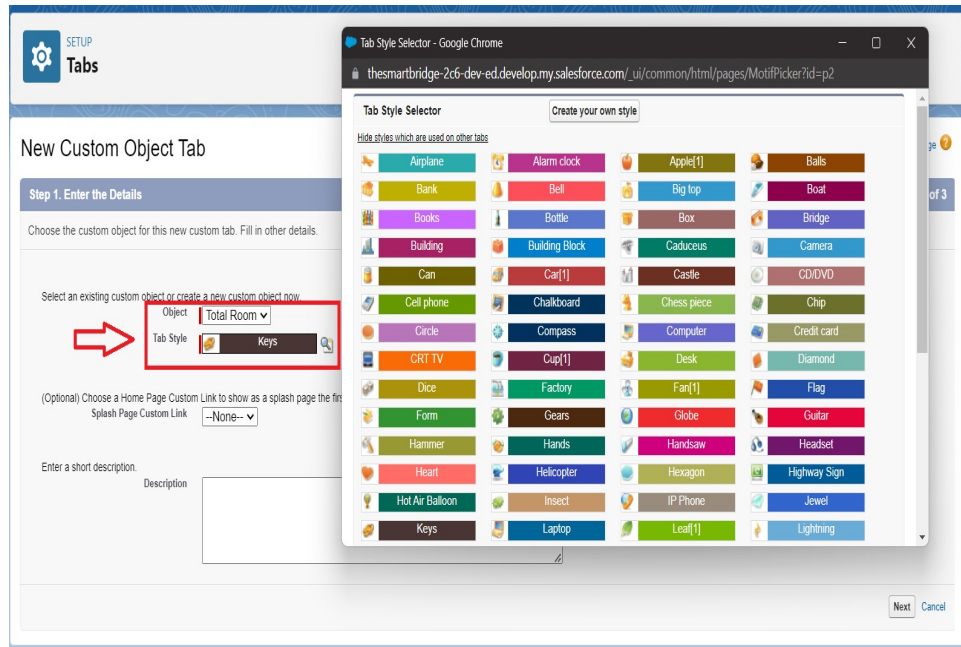
Types of Tabs:

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 :

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



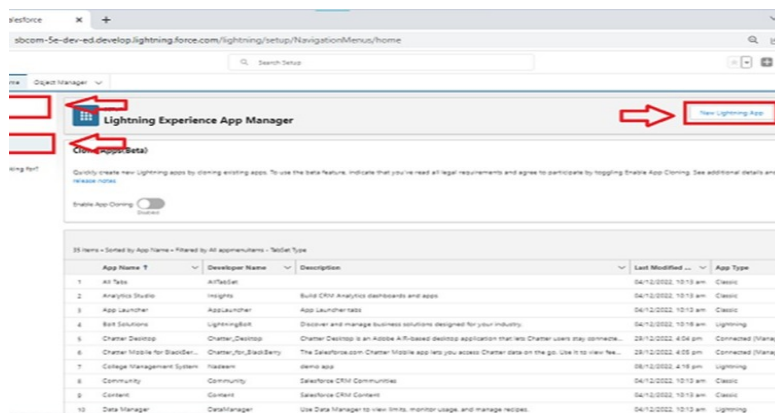
3. Next (Add to profilespage) keep it as default
4. Next (Add to CustomApp) keep it as default& Save.

Milestone 4 - The LightningApp

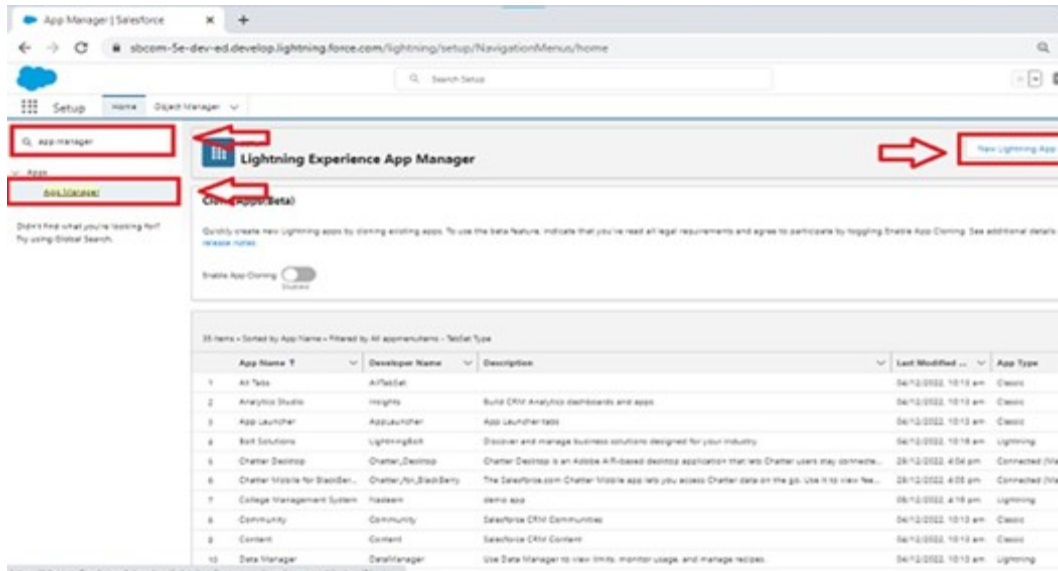
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightningapps give your users access to sets of objects,tabs, and other items all inone convenient bundle in the navigation bar.

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.

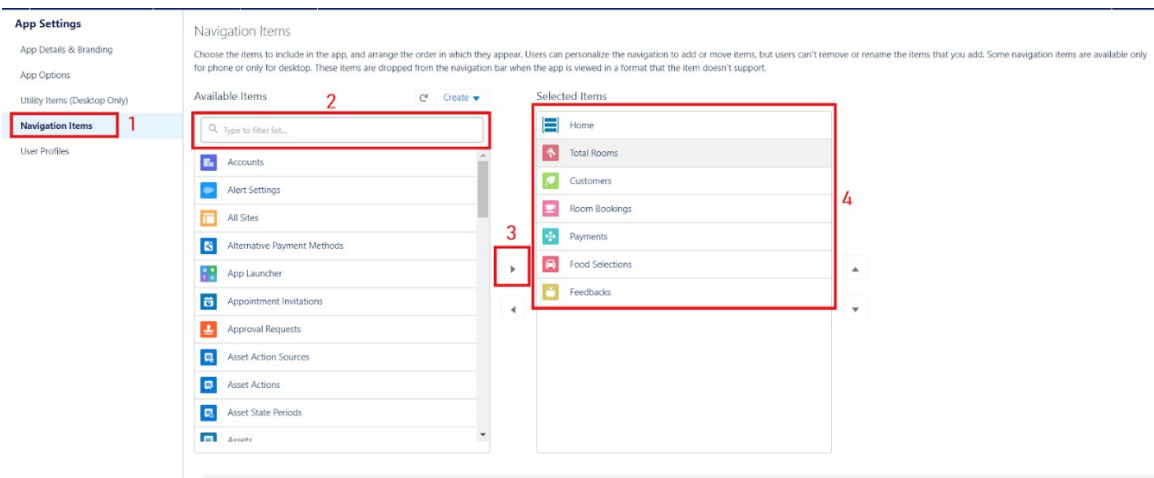
Activity 1: To create a lightningapp page:



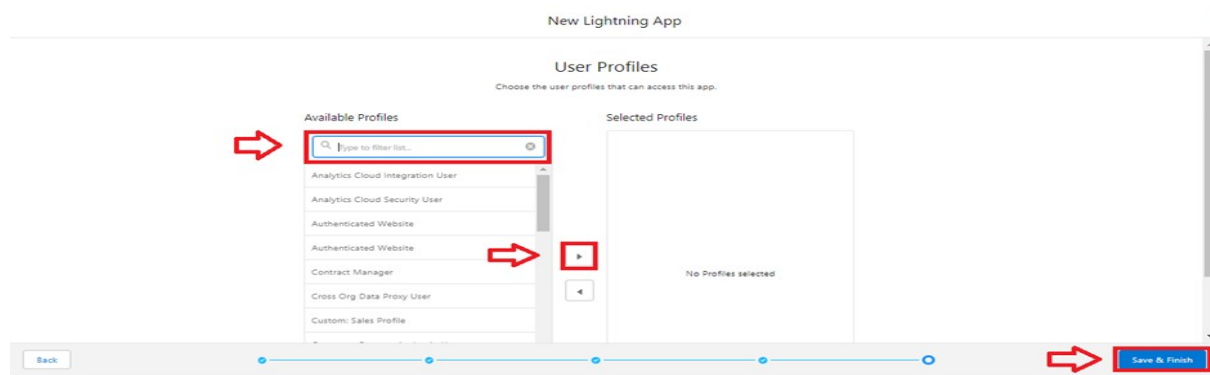
- 1.Go to setup page > search“app manager” in quickfind > select “app manager” > click on Newlightning App.



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 valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records becomes simpler 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 simply delete a Standard Field until it 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 common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

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. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Activity 1: Creation of fields for the customer1 object

1. To create fields in an object:

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

2. Now clickon “Fields & Relationships” > New

Setup - Object Manager - Customer1

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
current Status	current_Status__c	Picklist		
Customer Name	Name	Text(80)		✓
Email id	Email_id__c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Permanent Address	Permanent_Address__c	Text Area(255)		
Phone no	Phone_no__c	Phone		

1. Select Data Type as a “Phone”

Setup - Object Manager - Customer1

Fields & Relationships

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

2. Click on next

1. Fillthe Above as following:

a. Field Label:Room Sharing

b. Value - Select entervalue with each value separated by a new line

1. Single sharing

2. Double sharing

3. Triple sharing

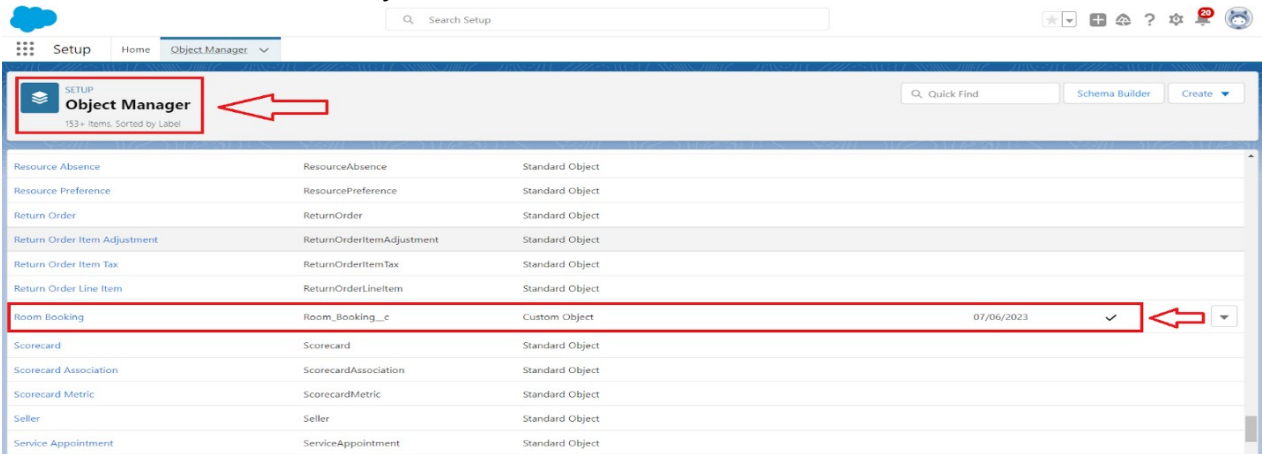
● Select required

- Click on Next > Next > Save and new.

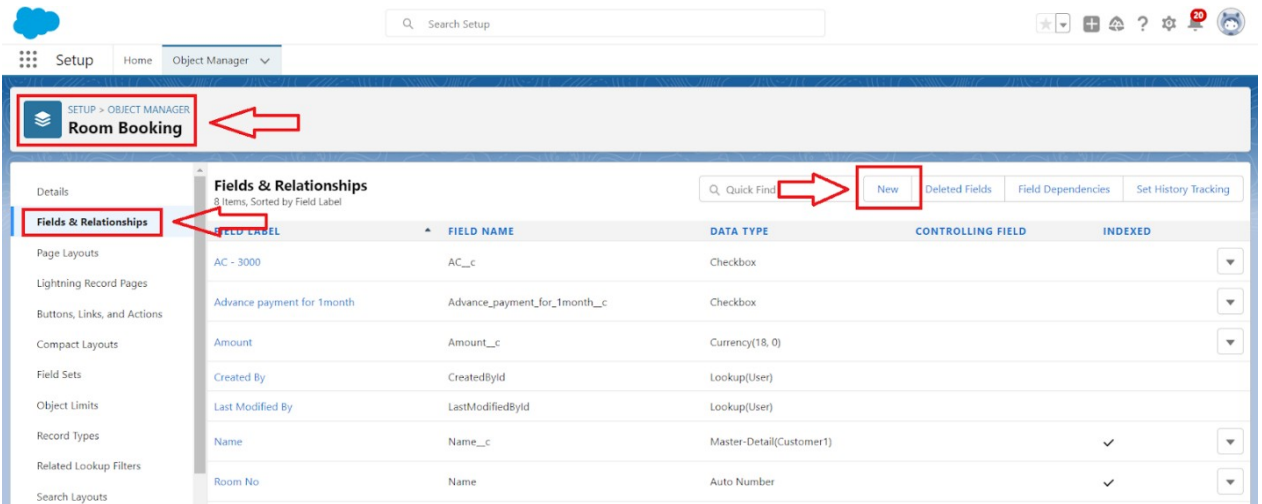
2. To Create a Fields & Relationship to an Room Booking Object

To create fields & relationship to an object:

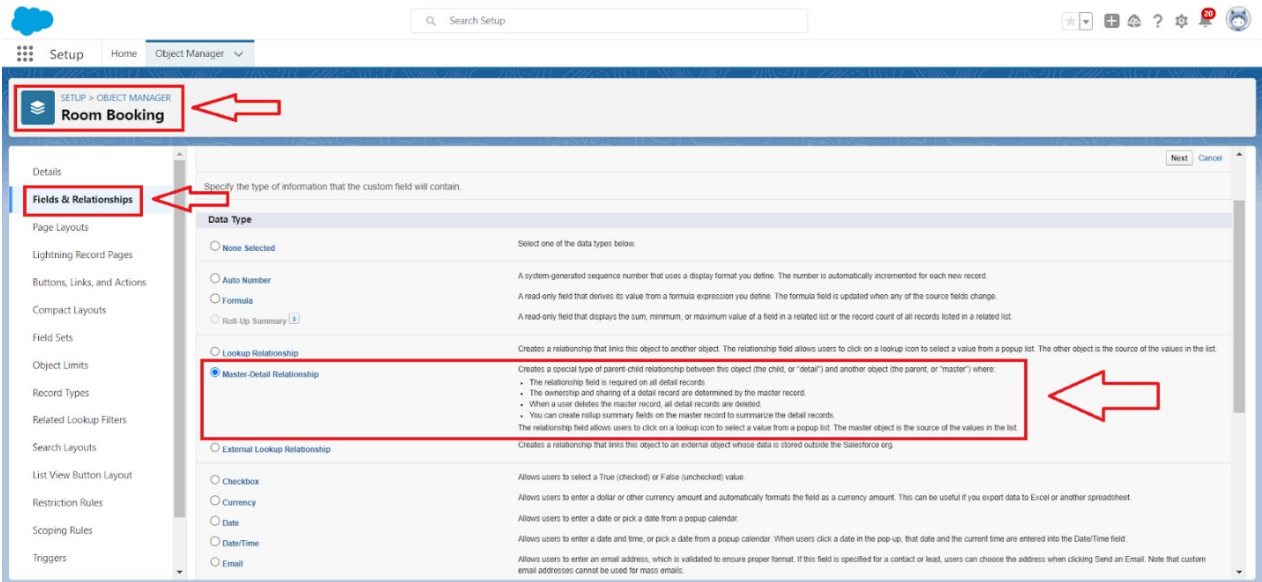
1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.



Now click on “Fields & Relationships” > New



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

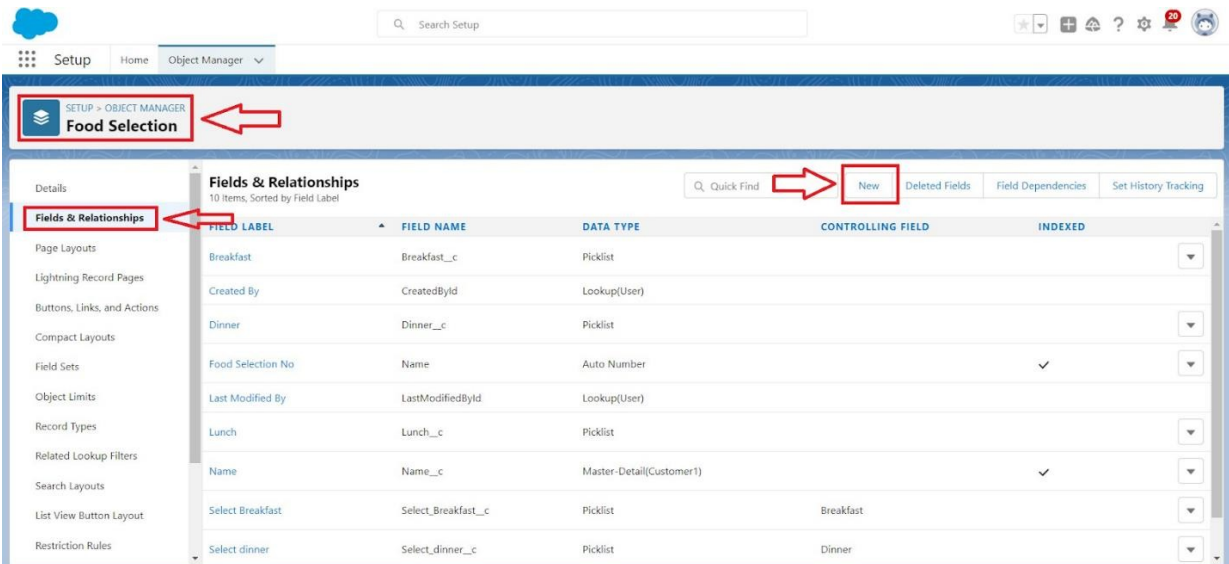


3. Click on the Related to drop down and Select the “Customer1” object and click on Next

Creation of fields for the Food Selection object

1. To create fields & relationship to an object:

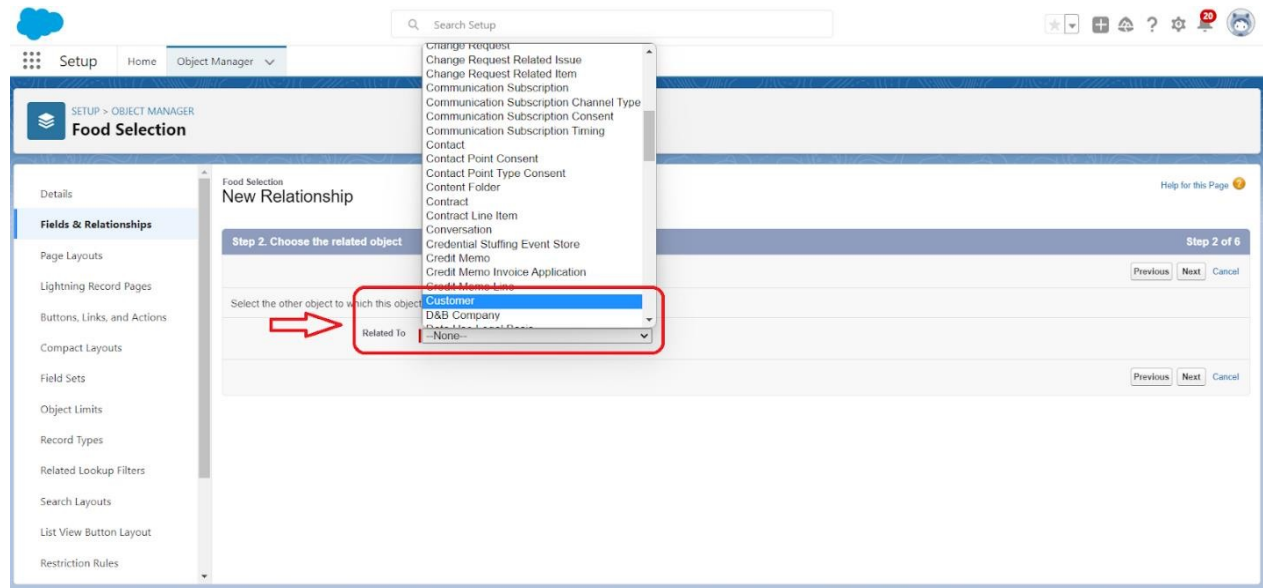
1. Go to setup > click on Object Manager > type object name (Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New



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:

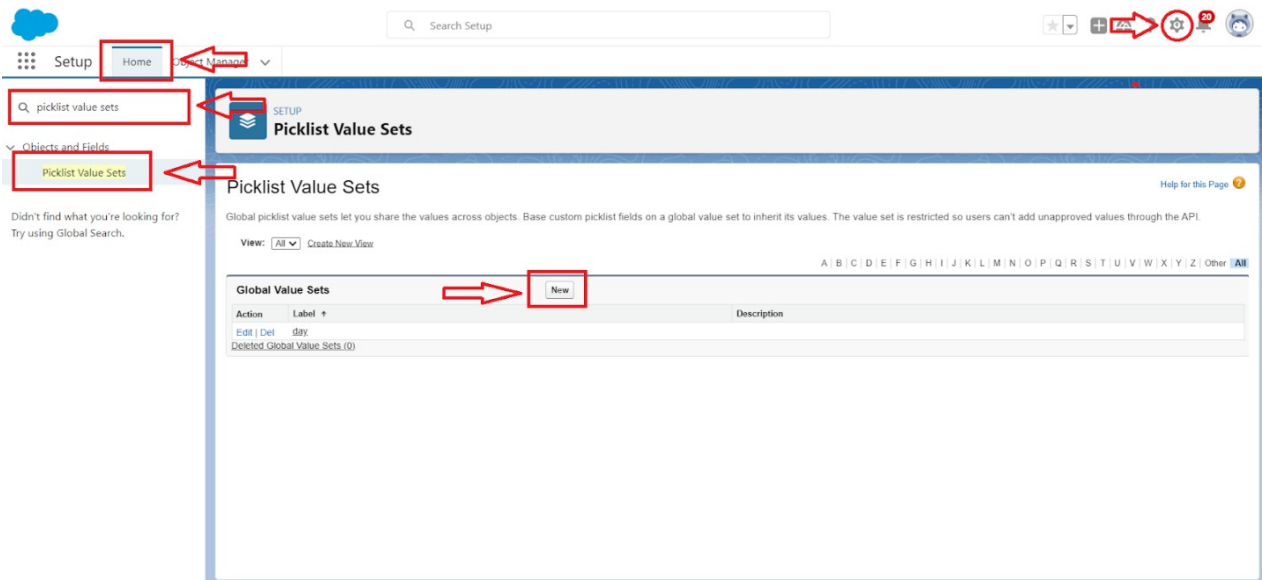
- Change the Field Label:Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

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.

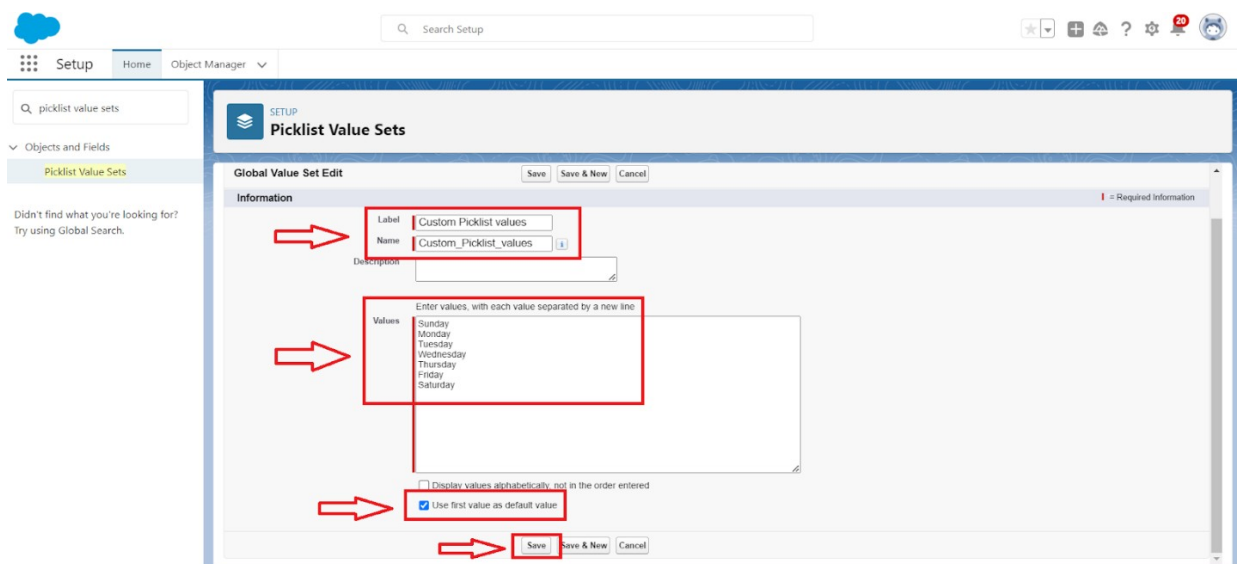
Create a picklist value set:

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 the Label name and API name automatically Generate
5. Enter the values with each value separated by a new line

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

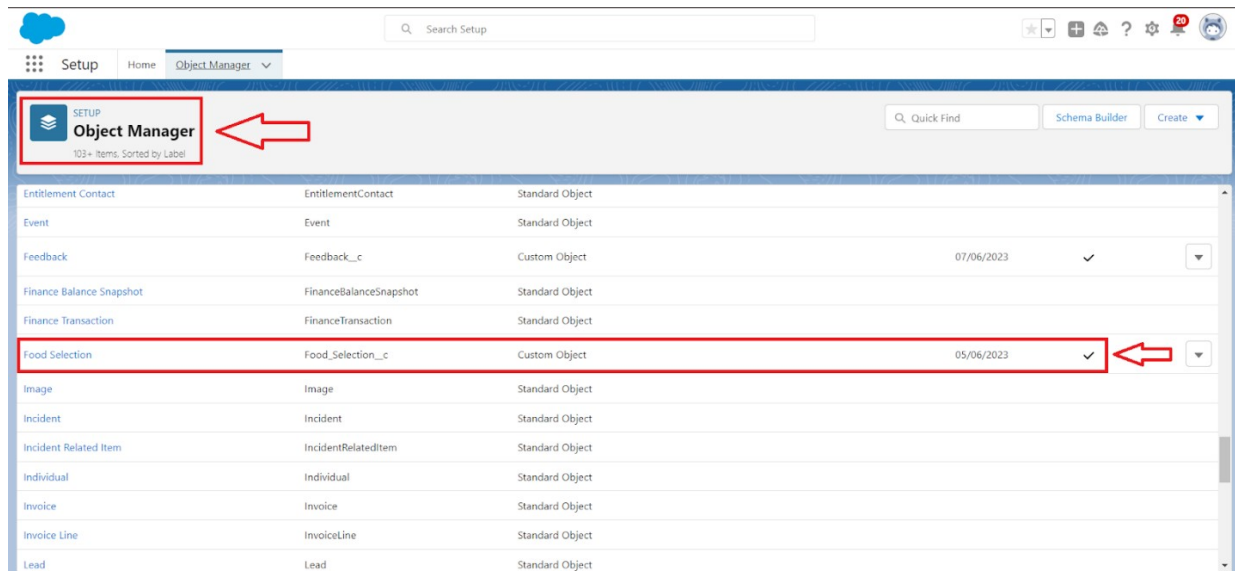


6. Check the Use first value as defaultvalue and Click on save.

2. Create a picklist Field for Food selection object

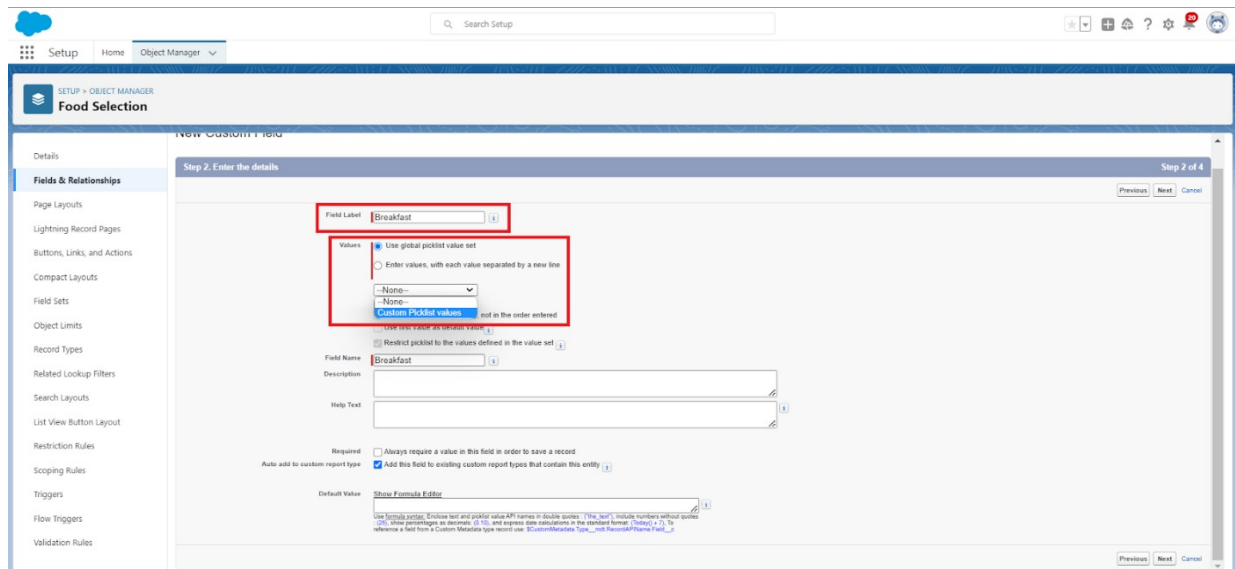
To create fields in an object:

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



1. Now click on “Fields & Relationships” > New

2. Select Data Type as a “Picklist”



3. Fill the Above as following:

- Field Label: Breakfast
- Under Value - Select the Use global picklist value set

- 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 meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

create a validation rule to an Room Booking Object

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. Enter Rule name "checkbox field" and make the validation should be Active.
4. Enter the formula in the formula Box "Advance_payment_for_1month_c = false" and check for syntax error.
5. Enter the error message "Checkbox should be checked"
6. Select error location as field(Advance payment for 1month)

7. Click on save.

create a Another validation rule to an Room Booking Object

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. Enter Rule name "check in rule" and make the validation should be Active.
4. Enter the formula in the formula Box " Check_in__c = False " and check for syntax error.
5. Enter the error message "Check box should be checked"
6. Select error location as field(Check in)

The screenshot shows the Salesforce Rule Editor interface. The 'Rule Name' field is set to 'check_in_rule' (labeled 1). The 'Active' checkbox is checked. The 'Error Condition Formula' section shows an example formula 'Discount_Percent >= 30' and a description 'Display an error if Discount is more than 30%'. The formula editor shows 'Check_in__c = False' (labeled 2). The 'Error Message' section shows an example message 'Discount percent cannot exceed 30%' and a description 'This message will appear when Error Condition formula is true'. The error message field contains 'Check box should be checked' (labeled 3). The 'Error Location' section shows options for 'Top of Page', 'Field', and 'Check in' (labeled 4).

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 default salesforce provides below standard profiles.

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

We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

Custom user Profile

To create new profile:

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

SETUP
Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. ⓘ = Required Information

Existing Profile	Standard User
User License	Salesforce
Profile Name	Custom user

Save Cancel

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

Basic Access

	Read	Create	Edit	Delete
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedbacks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Food Selections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Data Administration

	View All	Modify All
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedbacks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Food Selections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Basic Access

	Read	Create	Edit	Delete
Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Room Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Total Rooms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Data Administration

	View All	Modify All
Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Room Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Total Rooms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Session Settings

Session Times Out After: 8 hours of inactivity ⓘ

Session Security Level Required at Login: --None-- ⓘ

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

5. Scroll down and Click on Save.

Custom platform user1

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 platformUser1) > Save.
3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give only Read access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

Basic Access

	Read	Create	Edit	Delete
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedbacks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food Selections	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Data Administration

	View All	Modify All
Customers	<input type="checkbox"/>	<input type="checkbox"/>
Feedbacks	<input type="checkbox"/>	<input type="checkbox"/>
Food Selections	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

5. Scroll down and Click on 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 profile page, then click Edit.
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. And Read Access permission for Total Rooms Object.

Basic Access

	Read	Create	Edit	Delete
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedbacks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Food Selections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Data Administration

	View All	Modify All
Customers	<input type="checkbox"/>	<input type="checkbox"/>
Feedbacks	<input type="checkbox"/>	<input type="checkbox"/>
Food Selections	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

5. Scroll down and Click on Save.

Roles

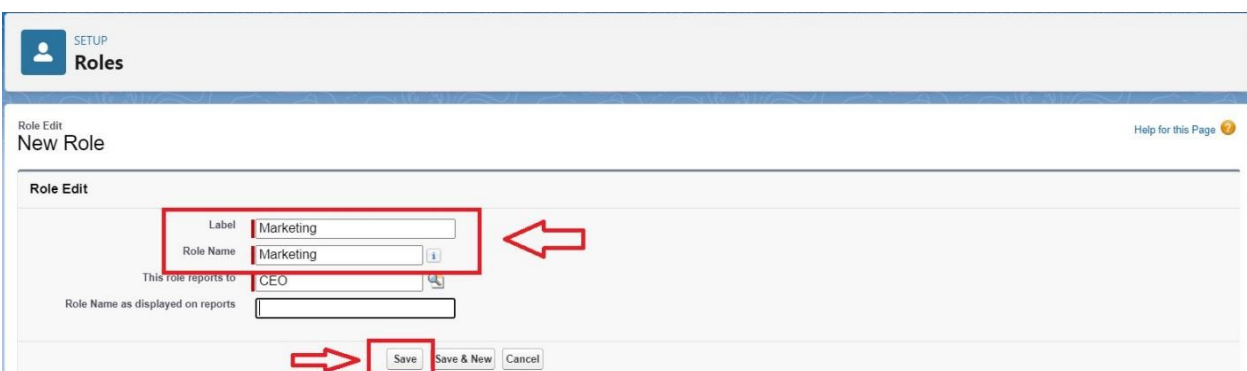
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Marketing Role

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

Role Edit
New Role

Role Edit

Label: Receptionist

Role Name: Receptionist

This role reports to: CEO

Role Name as displayed on reports:

Save Save & New Cancel

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.

Setup Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Androthi Veera Venkata Vararasad	YAndr	newroiect1@thesmartbriqee.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatly.004500000dya7eav.48btyvazghbezj@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	User_Integration	integ	integration@000dch000000dya7eav.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@000dch000000dya7eav.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

2. Fill in the fields

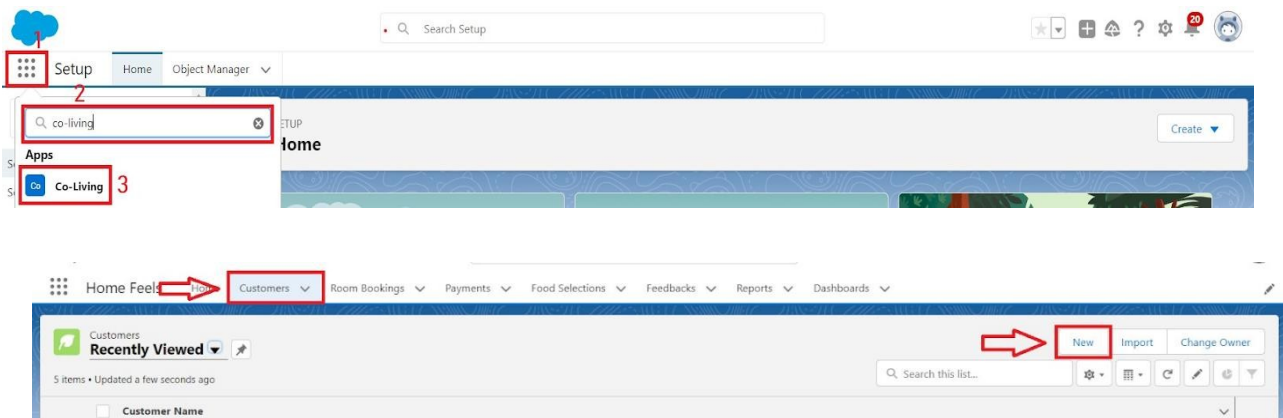
a. First Name : sandeep

- b. Last Name : gujja
- c. Alias : Give a Alias Name
- d. Email id : Give your Personal Email id
- e. Username : Username should be in this form: text@text.com
- f. Nick Name : Give a Nickname
- g. Role : CEO
- h. User licence : Salesforce
- i. Profiles : Custom user

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)

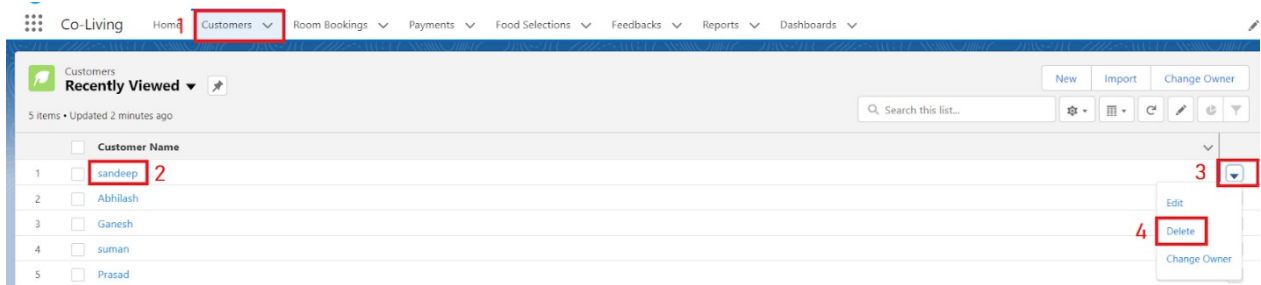
1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on CustomerTab.
4. Click on anyrecord name. you can see the details of the Customer.

The screenshot shows a web application interface with a top navigation bar containing 'Home Feels', 'Home', 'Customers' (highlighted with a red box), 'Room Bookings', 'Payments', 'Food Selections', 'Feedbacks', 'Reports', and 'Dashboards'. Below the navigation bar, there is a header for 'Customer1 sandeep'. The main content area is titled 'Details' and contains a table with customer information. The table is divided into two columns: 'Related' and 'Details'. The 'Details' column contains the following information:

Related	Details
Customer Name	sandeep
Phone no	970526532
Email id	sandeep@gmail.com
Created By	Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm
Owner	Veera Venkata Varaprasad Androthu
Permanent Address	Hyderabad
current Status	Employee
Last Modified By	Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm

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.

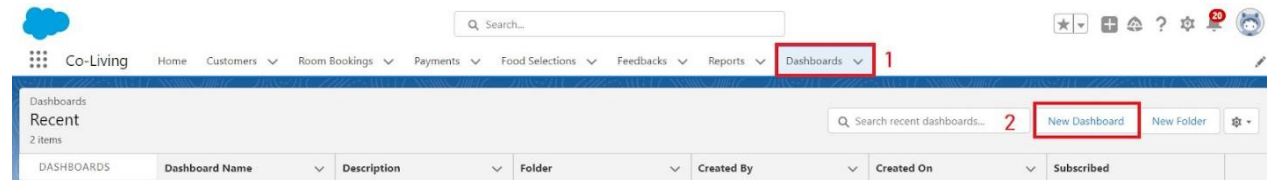


Dashboards

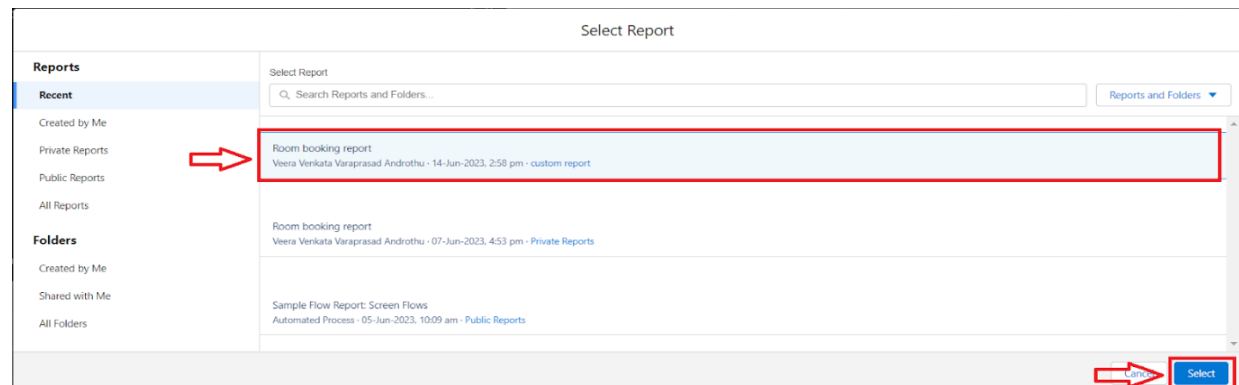
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Create Dashboard

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



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



Edit Component

Room booking report

Subtitle

Amount

Footer

Legend Position

Right

Component Theme

☐ Light (Dashboard default)

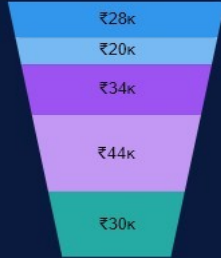
☒ Dark

Preview

Room booking report

Amount

Sum of Amount: ₹156k



Customer Name	Amount
Abhilash	₹28k
Ganesh	₹20k
Prasad	₹34k
sandeep	₹44k
suman	₹30k

Customer Name

Abhilash ■

Ganesh ■

Prasad ■

sandeep ■

suman ■

View Report (Room booking report)

Cancel
Update

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

Create Another Dashboard

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

Flows

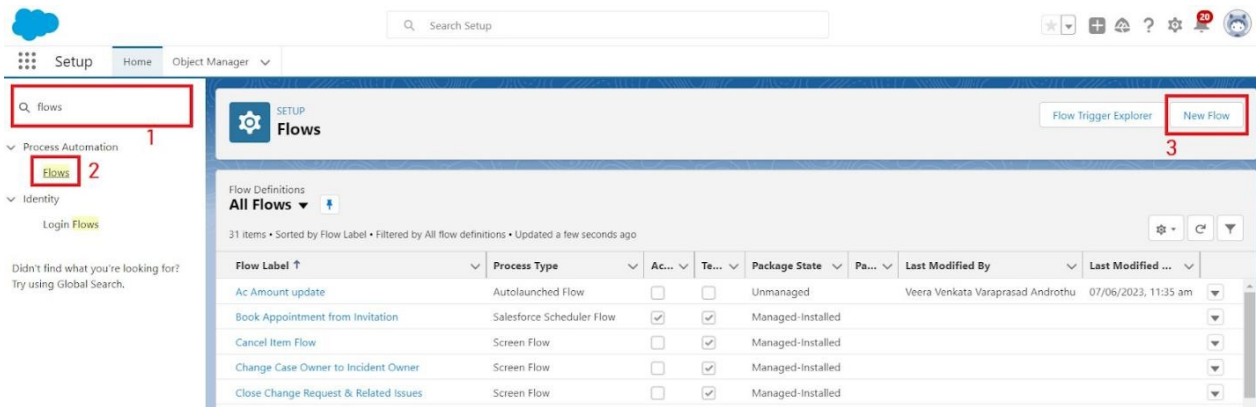
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Why do we need to create a flow:

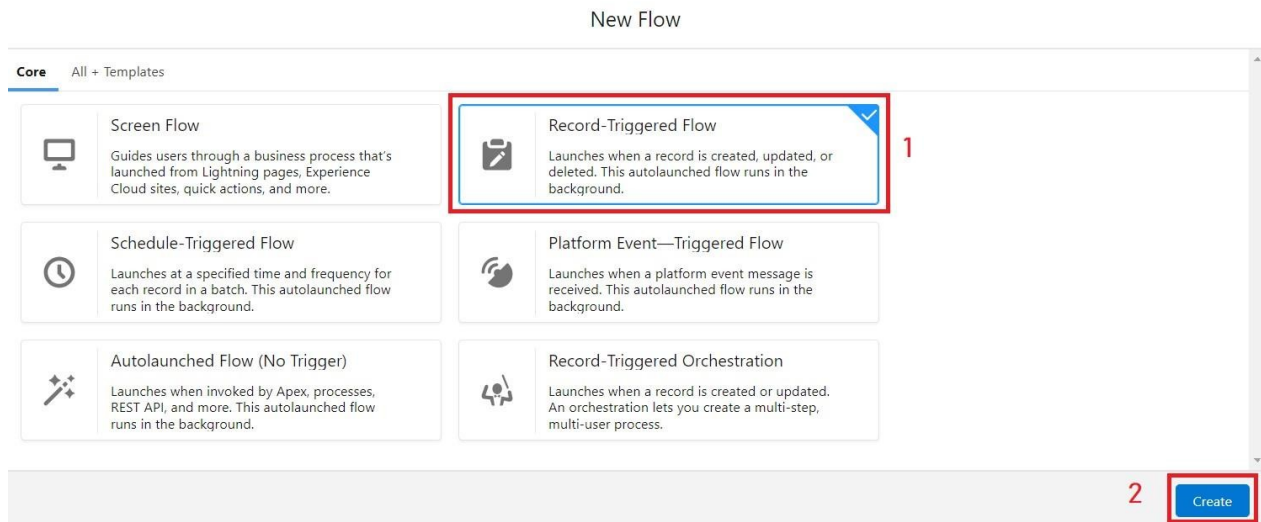
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

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 and Click 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".

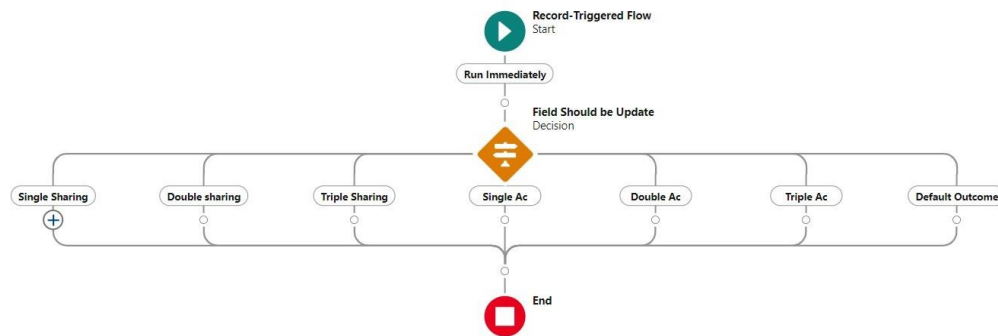
1. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.

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

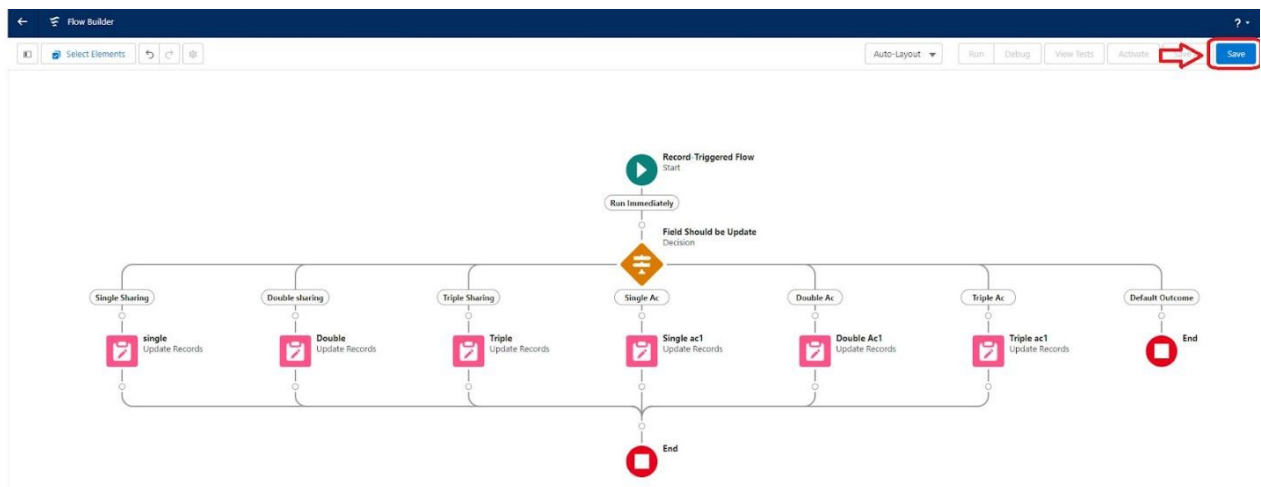
3. Enter the DetailsLabel: Field should be Update, API name: Gets Automatically Generated.

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 customer details, enabling residents to easily choose from different air-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 convenience for residents.

