

# A CRM Application to Manage the Booking of Co-Living

**Abstract :** Our co-living space project fosters an inclusive community where 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 services like room cleaning, internet connection, and food.

## Features and Functionality:

### 1. Customer Management

- I. **Customer Registration:** Users can register themselves by providing personal details such as name, email, phone number, and address.
- II. **Customer Profile:** A user profile will be created to store customer information, booking history, and payment details.

### 2. Room Booking

- I. **Room Selection:** Users can browse and select from different AC rooms with multiple sharing options (e.g., single, double, triple sharing).
- II. **Room Availability:** The application will display the availability of each room type in real-time.
- III. **Booking:** Users can book a room by selecting the desired room type, checkin and check-out dates, and number of occupants.

### 3. Food Services

- I. **Food Menu:** A menu of special food items will be available for users to select from.
- II. **Daily Food Selection:** Users can select food items for each day of their stay.
- III. **Food Preferences:** Users can specify dietary restrictions or preferences (e.g., vegetarian, gluten-free).

### 4. Payment Management

- I. **Payment Options:** Users can make payments using various modes such as credit/debit cards, net banking, or wallets.
- II. **Payment History:** A record of all payments made by a user will be stored in their profile.

### 5. Feedback and Review

- I. **Service Feedback:** Users can provide feedback on various services such as room cleaning, internet connection, food quality, and overall experience.
- II. **Rating System:** Users can rate their experience on a scale of 1-5.

### 6. Reporting and Analytics

- I. **Booking Reports:** The application will generate reports on room bookings, occupancy rates, and revenue.

**II. Customer Insights:** The application will provide insights on customer behavior, preferences, and feedback.

## 7. Security and Access Control

- I. User Authentication:** Users will be authenticated using a secure login system.
- II. Role-Based Access:** Administrators will have access to manage bookings, customer data, and reports, while users will have access to their profiles and booking information.

## 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.

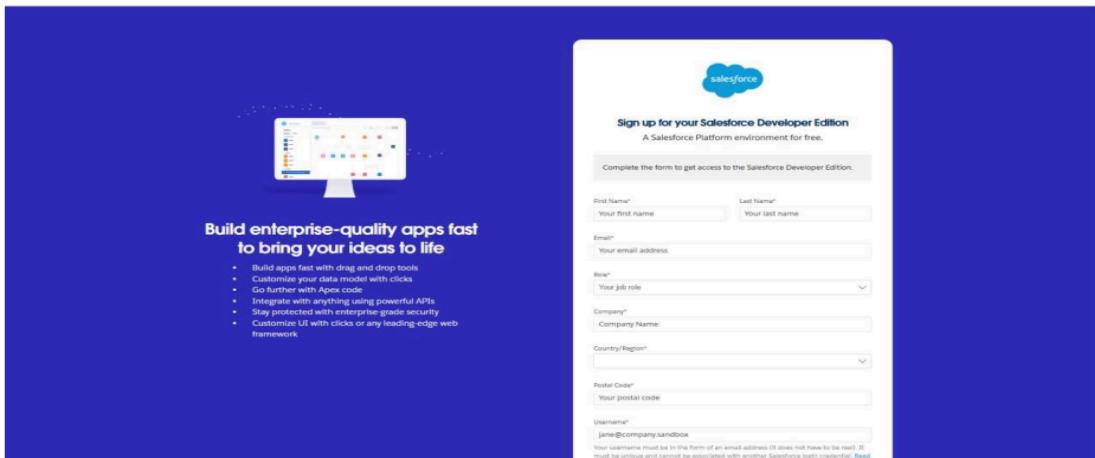
## Milestone 1 - Introduction to Salesforce:

### What is Salesforce?

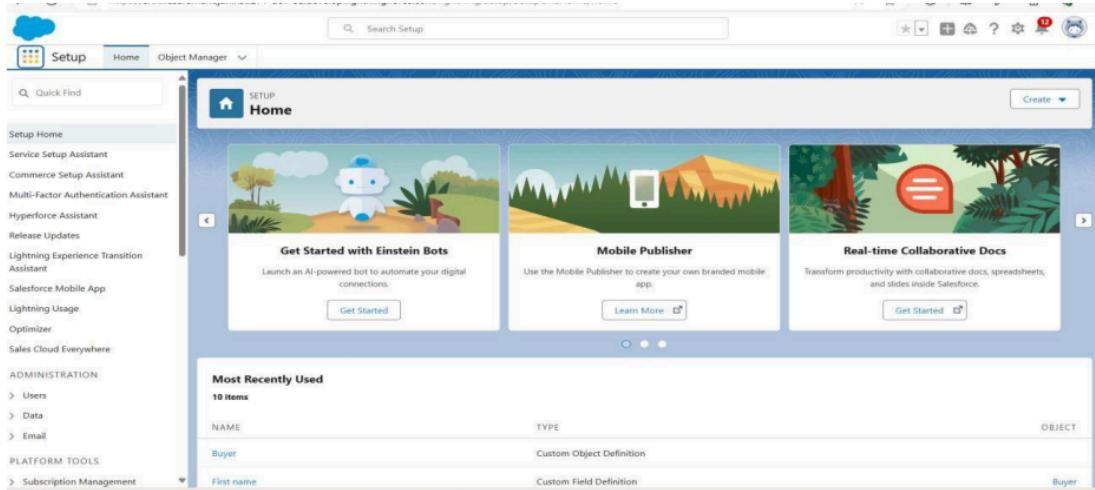
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate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

### Activity 1: Creating Developer Account:

<https://developer.salesforce.com/signup>



### Activity 2: Account Activation:



Activate your account by clicking the verify account which you received to your E-mail id.

## Milestone 2 – Object

### What Is an Object?

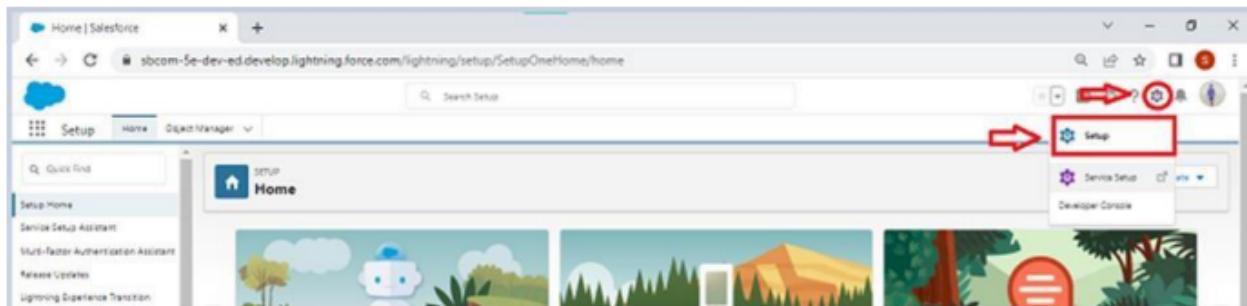
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

**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.

**To Navigate to Setup page:**

Click on gear icon ? click setup.



To create an object:

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

Setup Home Object Manager ▾

Object Manager 51+ items, Sorted by Label

Quick Find Schema Builder Create ▾

Custom Object

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
			Custom Object from Spreadsheet	

2. On the Custom object defining page:

3. Enter the label name, and plural label name, click on Allow reports, and Allow search.

New Custom Object | Salesforce

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in lists, page layouts, and reports.

**Label:** Example: Account

**Plural Label:** Example: Accounts

**Record Name:** Example: AccountName

**Description:**

Content descriptive map setting: Open the standard Salesforce.com Map & Training window | Open a viewer using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:  Example: AccountName

Date Type:

Optional Features

Allow Reports  Allow Activities  Track Field History  Track Chatter  Allow API Access  Allow Streaming API Access

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

Allow Sharing  Allow Bulk API Access  Allow Streaming API Access

Deployment Status

In Development  Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout  Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

4. Click on Save.

## Activity 1: Create a custom object for Total Rooms

To create an object:

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

1. Enter the label name Supplier
2. Plural label name? Suppliers
3. Fill in the label as " Total Room ".
4. Fill in the plural label as " Total Rooms ".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.

8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in lists, maps, reports, and charts.

Label	Total Room	Example: Account	1
Plural Label	Total Rooms	Example: Accounts	

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name	Total_Rooms	Example: Account	2
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Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

**Enter Record Name Label and Format**

The Record Name appears in page layouts, lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Total No Of Rooms	Example: Account Name	3
Data Type	Text		

11. Leave everything else as is, and click Save.

**Optional Features**

- Allow Reports ←
- Allow Activities
- Track Feed History
- Allow in Chatter Groups
- Enable Licensing [Learn more](#)

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status**

- In Development
- Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search ←

**Object Creation Options (Available only when custom object is first created)**

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

**Buttons**

**Save** **Save & New** **Cancel**

## Create a custom object for Customer

The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER". A sidebar on the left lists various object configuration options: 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 is titled "Customer1" and displays its "Details". The "Description" field is empty. The "API Name" is set to "Customer1\_c". Under the "Custom" section, "Singular Label" is set to "Customer1" and "Plural Label" is set to "Customers". On the right side, there are checkboxes for "Enable Reports" (unchecked), "Track Activities" (unchecked), "Track Field History" (unchecked), and "Deployment Status" (set to "Deployed"). The "Help Settings" link points to "Standard salesforce.com Help Window".

## Create a custom object for Room Booking

The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER". The sidebar and object details are identical to the previous screenshot, but the object name is now "Room Booking". The "API Name" is "Room\_Booking\_c". The "Custom" section shows "Singular Label" as "Room Booking" and "Plural Label" as "Room Bookings". The right side of the screen shows the same configuration options as the first screenshot.

## Create a custom object for Payment

The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER". The sidebar and object details are identical to the previous screenshots, but the object name is "Payment1". The "API Name" is "Payment1\_c". The "Custom" section shows "Singular Label" as "Payment1" and "Plural Label" as "Payments". The right side of the screen shows the same configuration options as the first screenshot.

## Create a custom object for Food Selection

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Food Selection' is being created. The 'Details' tab is selected, showing the following configuration:

- Description:** API Name: Food\_Selection\_\_c, Custom: ✓, Singular Label: Food Selection, Plural Label: Food Selections.
- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

The left sidebar lists various object settings: 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.

## Create a custom object for Feedback

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Feedback' is being created. The 'Details' tab is selected, showing the following configuration:

- Description:** API Name: Feedback\_\_c, Custom: ✓, Singular Label: Feedback, Plural Label: Feedbacks.
- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

The left sidebar lists various object settings: 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.

## 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:

- 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.
- Web Tabs :** Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.
- Visualforce Tabs :** Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like 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 menu in Lightning Experience and the mobile app.

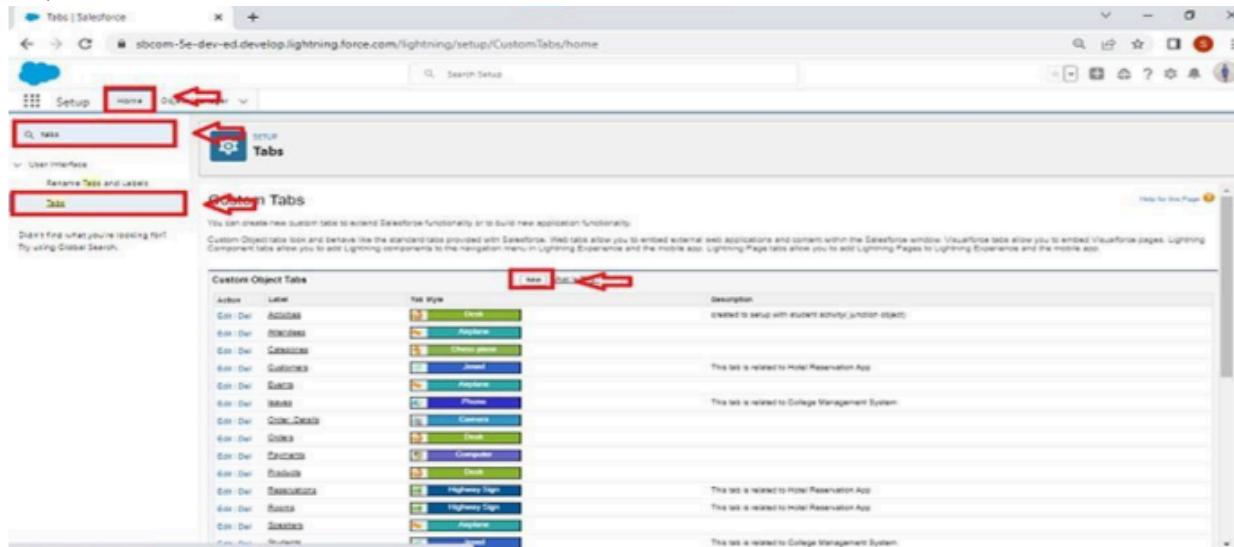
**5. Lightning Page Tabs** : Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

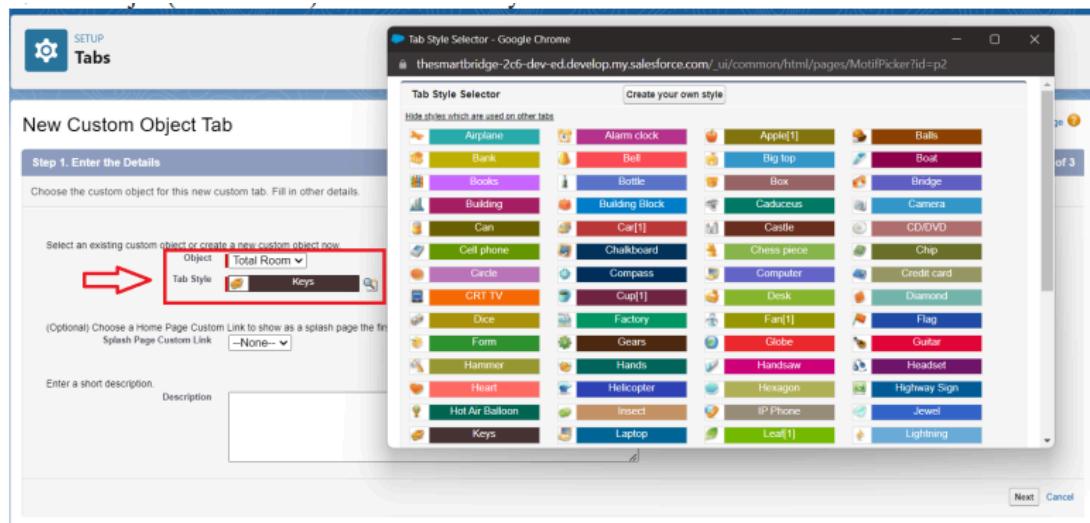
### Activity 1: Creating a Tab for Total Rooms

#### To create a Tab:(Total Rooms)

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



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



3. Next (Add to profiles page) keep it as default
4. Next (Add to Custom App) keep it as default & Save.

### Create a Tab for Customers

#### To create a Tab:(Customers)

1. Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)
2. Select Object(Customers) > Select the tab style > Next (Add to profiles page) keep it as default > Next (Add to Custom App) keep it as default > Save.

### To create a Tab for Room Bookings

#### To create a Tab:(Room Bookings)

1. Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)
2. Select Object(Room Bookings) ? Select the tab style ? Next (Add to profiles page) keep it as default ? Next (Add to Custom App) keep it as default ? Save.

### Create a Tabs For Remaining Objects

Now create the tabs for Payments, Food Selections, Feedbacks Objects.

## Milestone 4 - The Lightning App

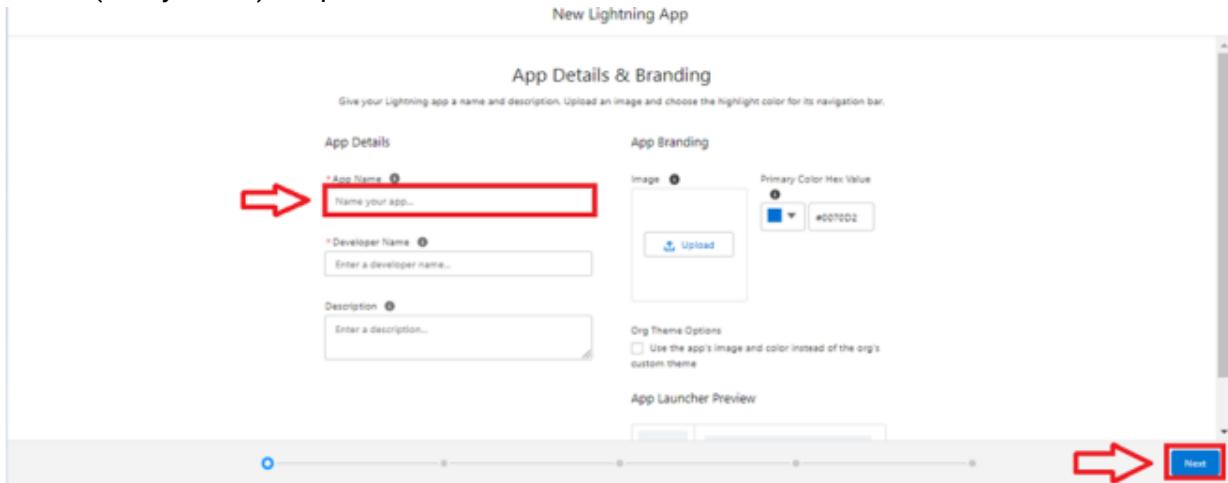
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and 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 lightning app page:

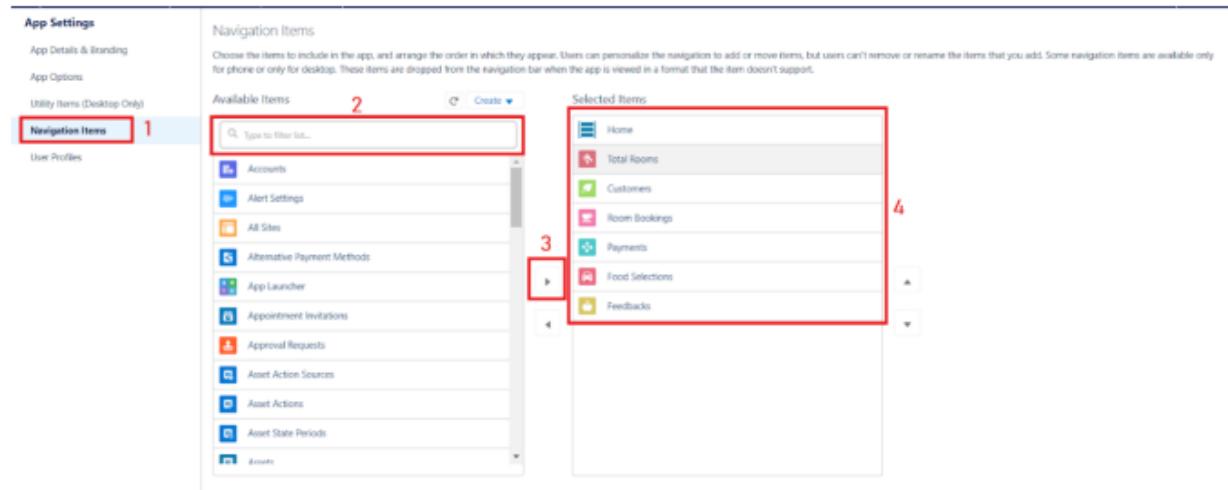
- 1.Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.

The screenshot shows the Salesforce App Manager interface. At the top, there are several buttons: 'App Manager', 'Setup', 'Home', 'Disket Manager', 'New Connected App', and 'New Lightning App'. Below these buttons, there are two red arrows pointing to the 'New Lightning App' button and the 'New Connected App' button. The main area displays a list of existing apps with columns for 'App Name', 'Developer Name', 'Description', 'Last Modified...', 'App Type', and 'View'. The list includes apps like 'All Tabs', 'Analytics Studio', 'App Launcher', 'Best Solutions', 'Chatter Desktop', 'Chatter Mobile for BlackBerry', 'College Management System', 'Community', 'Content', and 'Data Manager'. At the bottom of the list, there is a note: 'Didnt find what you're looking for? Try using Global Search.' and a link to 'Release Notes'.

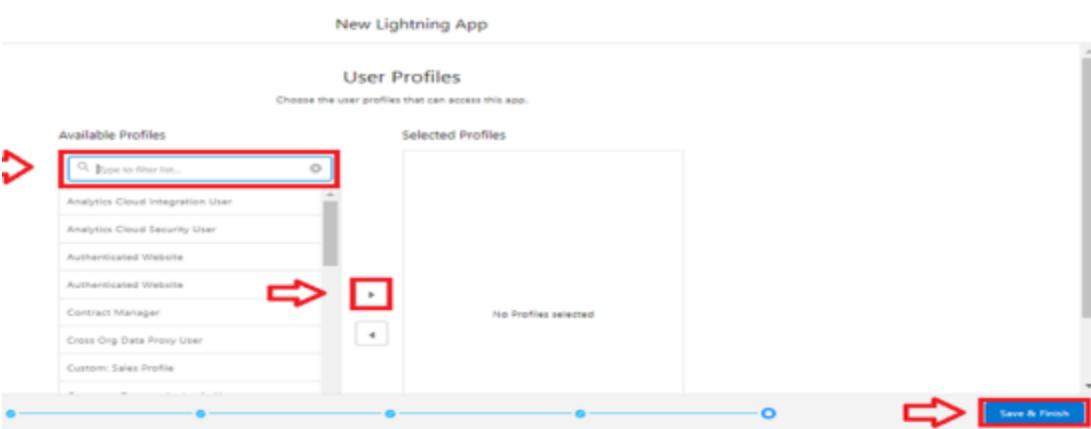
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.



3. 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.



4. To Add User Profiles:



5. Search profiles (System administrator) in the search bar > 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 become 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,

? Created By

? Owner

? Last Modified

? 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 click on “Fields & Relationships” > New

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it, a sidebar lists various object settings like 'Page Layouts', 'Lightning Record Pages', etc. The main area is titled 'Customer1' (with a red arrow pointing to it). Under 'Customer1', there's a 'Fields & Relationships' section (also with a red arrow pointing to it). A table lists existing fields: 'Created By', 'current\_Status', 'Customer Name', 'Email id', 'Last Modified By', 'Owner', 'Permanent Address', and 'Phone no'. A red arrow points to the 'New' button in the top right of the table header. The table has columns for 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'.

### 3. Select Data Type as a "Phone"

The screenshot shows the 'Object Manager' section for 'Customer1'. In the left sidebar, 'Fields & Relationships' is selected. Under 'Fields & Relationships', there is a list of data types: Currency, Date, Date/Time, Email, Geolocation, Number, Percent, and Phone. The 'Phone' option is highlighted with a red box and has a red arrow pointing to it from the right side of the image. To the right of the list, there is a detailed description of what each data type allows users to do.

### 4. Click on next

The screenshot shows the 'Edit Customer1 Custom Field' page. The 'Field Information' section is displayed, showing 'Field Label' as 'Phone no' and 'Field Name' as 'Phone\_no'. Both of these fields are highlighted with red boxes and have red arrows pointing to them from the left side of the image. Other settings like 'Data Type' (set to 'Phone') and 'Required' (checkbox checked) are also visible.

### 5. Fill the Above as following:

1. Field Label: Phone no
2. Field Name : gets auto generated
3. Click on Next > Next > Save and new.

#### 2. To create another 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 click on "Fields & Relationships" > New
3. Select Data type as a "Email" and Click on Next
4. Fill the Above as following:

- Field Label: Email
- Field Name :It's gets auto generated

- Click on Next > Next > Save and new.

### **3. To create another 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 click on “Fields & Relationships” ? New
3. Select Data type as a “Text Area” and Click on Next
4. Fill the Above as following:
  - o Field Label: Permanent Address
  - o Field Name : It's gets auto generated
  - o Click on Next > Next > Save and new.

### **4. To create another 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 click on “Fields & Relationships” > New
3. Select Data type as a “Picklist” and Click on Next
4. Fill the Above as following:

Field Label: Current Status

Value - Select enter values with each value separated by a new line

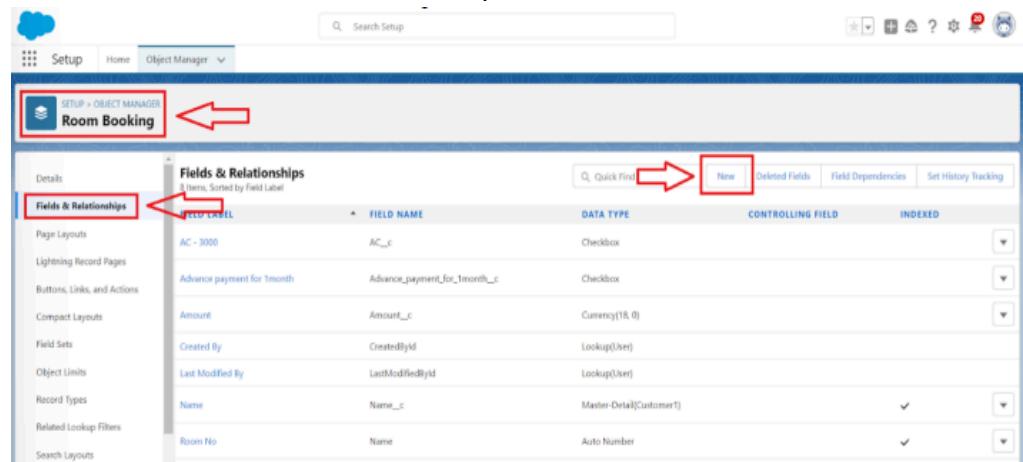
- Student
- Employee
- Others

- Select required
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

## **Creation of fields for the Room Booking object**

### **1. To create fields in 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



The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Room Booking' object in the list. Another red box highlights the 'Fields & Relationships' tab in the left sidebar. A third red box highlights the 'New' button at the top right of the main table area. The table lists various fields for the Room Booking object, including 'AC - 3000', 'Advance payment for 1month', 'Amount', 'Created By', 'Last Modified By', 'Name', and 'Room No'. The 'DATA TYPE' column shows 'Checkbox' for AC - 3000 and Advance payment for 1month, and 'Currency(18, 0)' for Amount. The 'CONTROLLING FIELD' and 'INDEXED' columns show dropdown arrows.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
AC - 3000	AC__c	Checkbox		
Advance payment for 1month	Advance_payment_for_1month_c	Checkbox		
Amount	Amount__c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)	✓	
Room No	Name	Auto Number	✓	

3. Select Data Type as a "Picklist"

4. Click on Next

The screenshot shows the 'Step 2. Enter the details' page for creating a new field. The 'Field Label' is set to 'Room Sharing' (1). The 'Values' section contains three options: 'Single sharing', 'Double sharing', and 'Triple sharing', all enclosed in a red box (2). Below the values, there are several checkboxes: 'Use global picklist value set' (unchecked), 'Enter values, with each value separated by a new line' (checked), 'Display values alphabetically, not in the order entered' (unchecked), 'Use first value as default value' (unchecked), 'Restricted picklist to the values defined in the value set' (checked), and 'Always require a value in this field in order to save a record' (checked) (3). Other fields like 'Field Name', 'Description', and 'Help Text' are also present.

5. Fill the Above as following:

- Field Label: Room Sharing
- Value - Select enter values with each value separated by a new line

1. Single sharing

2. Double sharing

3. Triple sharing

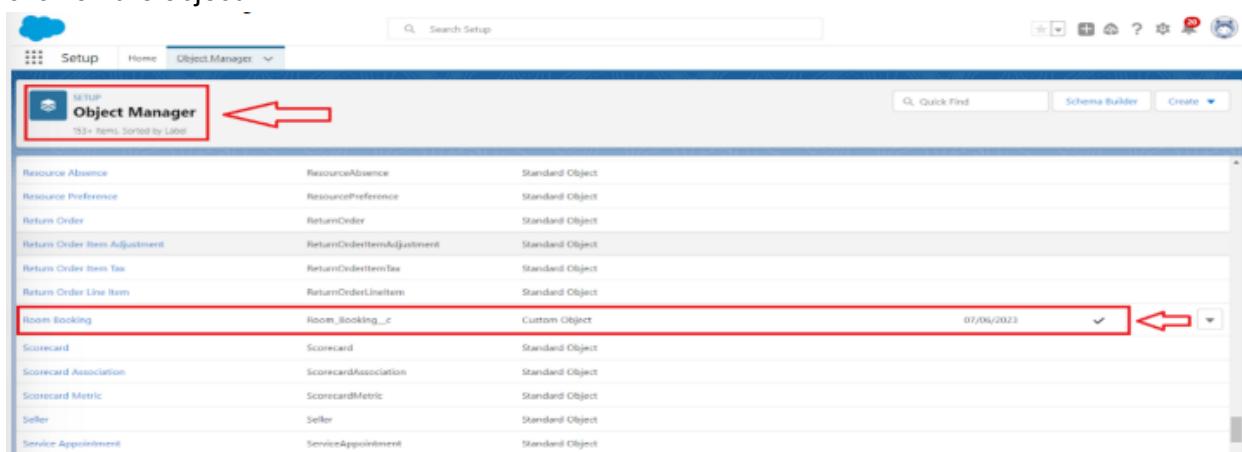
• Select required

• 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 object name(Room Booking) in the search bar > click on the object.



2. Now click on "Fields & Relationships" > New

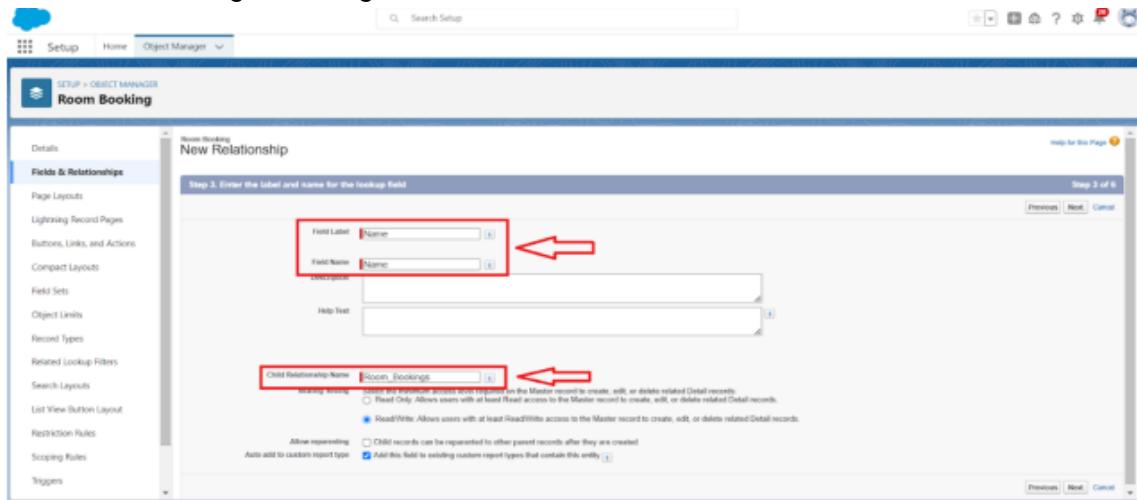
### 3. Select Data Type as a “Master-detail Relationship”

#### 4. Click on Next

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

#### 6. Fill the Above as following:

- Change the Field Label: Name
- Field Name : It's gets auto generated



- Click on Next > Next > Save and new.

### 3. To create fields in 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 "Checkbox"
4. Click on Next 5. Fill the Above as following:
  - Field Label: AC-3000
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new

### 4. To create fields in 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 "Checkbox"
4. Click on Next
5. Fill the Above as following:
  - Field Label: Advance Payment for 1 Month
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new

### 5. To create fields in 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 "Currency"
4. Click on Next

5. Fill the Above as following:

- Field Label: Amount
- Length: (18,0)
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new

## 6. To Create a 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 "Total Rooms" object and click on Next • Fill the Above as following:

- Change the Field Label: Total No Of Rooms
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

## 7. To Create a Rollup Summary Field in "Total Room Object"

1. After Creating the Master- Detail Relationship Than Only you can create the Rollup Summary

2. Go to setup > click on Object Manager > type object name(Total Rooms) in the search bar > click on the object.

3. Now click on "Fields & Relationships" ? New

4. Select Data type as a "Roll-up Summary" and Click on Next

• Fill the Above as following:

• Field Label: Rooms Booked

• Field Name :It's gets auto generated

• Click on Next

5. Select the Room Bookings in the Summarized Object

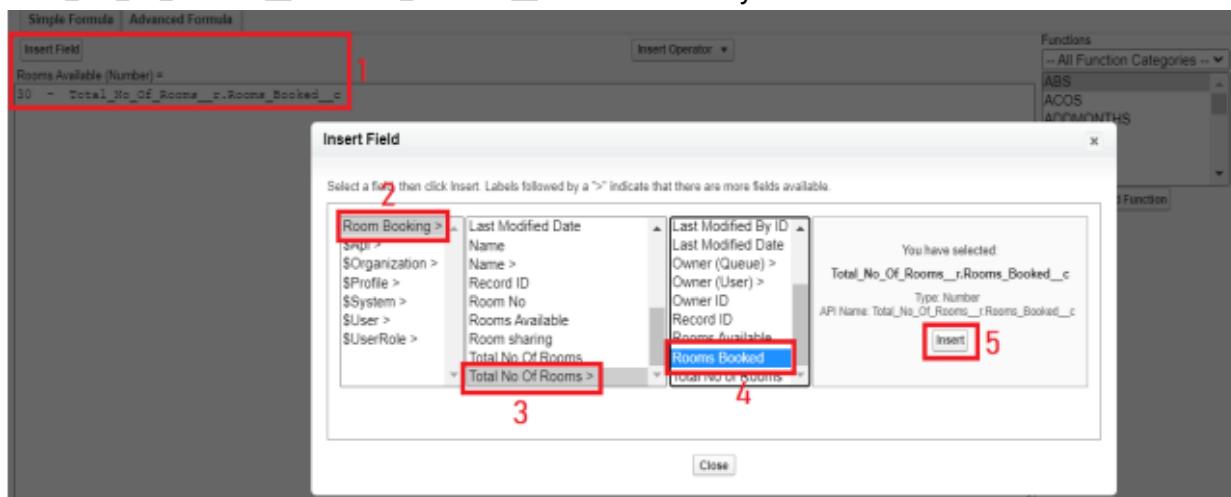
6. Select the count Radio button in the select Roll-up Type

The screenshot shows the 'Step 3. Define the summary calculation' page. At the top, it says 'Select Object to Summarize' with 'Master Object' set to 'Total Room' and 'Summarized Object' set to 'Room Bookings'. Below this, under 'Select Roll-Up Type', there are four radio buttons: 'COUNT' (which is selected and highlighted with a red arrow), 'SUM', 'MIN', and 'MAX'. A yellow box highlights the 'Field to Aggregate' dropdown, which is currently set to 'None'. At the bottom, there's a 'Filter Criteria' section with two options: 'All records should be included in the calculation' (selected) and 'Only records meeting certain criteria should be included in the calculation'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

7. Click on Next > Next > Save and new

## 8. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Rooms Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data type as a "Formula" and Click on Next
4. Fill the Above as following:
  - Field Label: Rooms Available
  - Field Name : It's gets auto generated
  - Select the Formula Return Type as "Number"
  - Select the Decimal places as "0" and Click on Next
  - Click on the Advanced Formula and Enter the value in formula box " 30 - " and Click on insert field than you will find a pop window under the Room Booking select the Total No Of Rooms in the second Column and select the Room Booked in the third column and click on insert " 30 - Total\_No\_Of\_Rooms\_\_r.Rooms\_Booked\_\_c " and Check Syntax



- Click on Next > Next > Save and new.

## 9. To create fields in 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 "Checkbox"
4. Click on Next
5. Fill the Above as following:
  - Field Label: Check in
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new

## 10. To create fields in 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 "Checkbox"
4. Click on Next
5. Fill the Above as following:
  - Field Label: Check Out
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new

## Creation of Fields & Relationship for Payment1 Object

### 1. To create fields & relationship to an object:

1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > New

FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Formula (Currency)		
Created By	Lookup(User)		
Last Modified By	Lookup(User)		
Name	Master Detail(Customer)		
Payment ID	Number(18, 0)		
Payment Mode	Picklist		
Payment No	Auto Number		
Room Booking	Lookup(Room Booking)		

3. Select Data Type as a "Master-detail Relationship"

Step 2: Choose the related object

Select the other object to which this object will be related

Related To:

- Customer
- D&B Company
- External Account
- None

4. Click on Next
5. Click on the Related to drop down and Select the Customer1 object and click on Next

The image consists of two vertically stacked screenshots of the Salesforce Object Manager interface.

**Screenshot 1: Step 2, Choose the related object**

- The title bar says "SETUP > OBJECT MANAGER" and the object name is "Payment1".
- The left sidebar shows "Fields & Relationships" selected.
- The main area is titled "Payment1 New Relationship".
- A dropdown menu labeled "Related To" is open, showing a list of objects. The "Customer" option is highlighted and circled in red.
- Red arrows point from the text "Select the other object to which this object is related" to the "Related To" dropdown, and from the "Customer" option in the dropdown to the circled "Customer" text.

**Screenshot 2: Step 3, Enter the label and name for the lookup field**

- The title bar says "SETUP > OBJECT MANAGER" and the object name is "Payment1".
- The left sidebar shows "Fields & Relationships" selected.
- The main area is titled "Payment1 New Relationship".
- Under "Field Label", the input field contains "Name" and has a red border.
- Under "Field Name", the input field contains "Name" and has a red border.
- Under "Child Relationship Name", the input field contains "Payments1" and has a red border.
- Red arrows point from the "Field Label" and "Field Name" fields to the first red box, and from the "Child Relationship Name" field to the second red box.

6. Fill the Above as following:
  - Change the Field Label: Name
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new.
- 2. To create another fields & relationship to an object:**
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
  2. Now click on "Fields & Relationships" > New

### 3. Select Data Type as a "Lookup Relationship"

#### 4. Click on Next

#### 5. Click on the Related to drop down and Select the Room Booking object and click on Next

6. Fill the Above as following:

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

3. Creation of another fields for the Payment1 object

To create fields in an object:

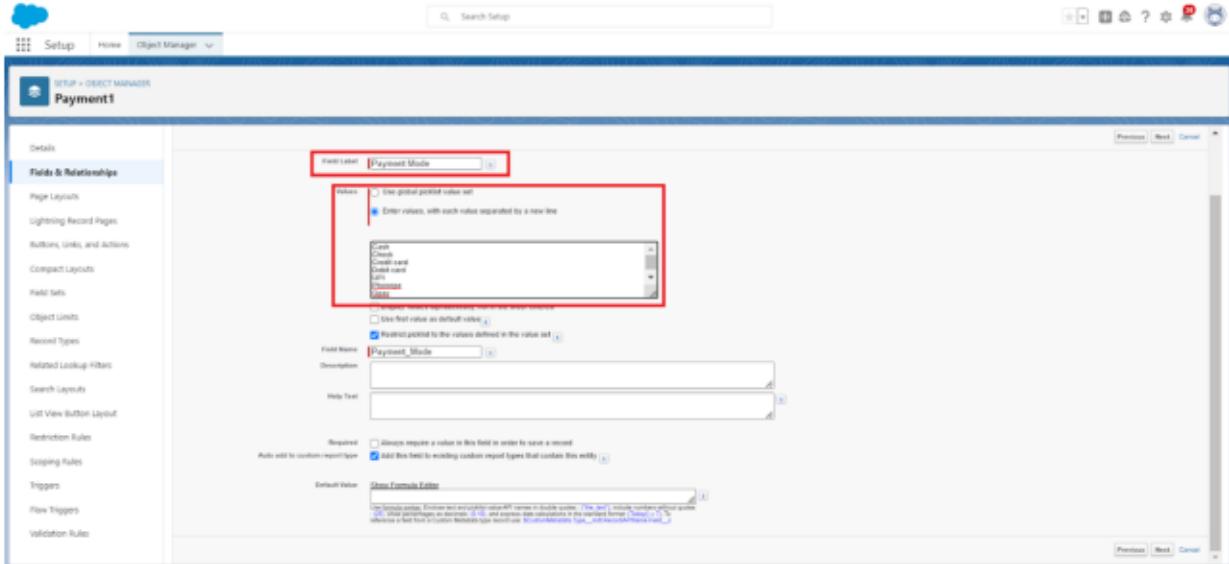
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.

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

The screenshot shows the Salesforce Object Manager interface for the 'Payment1' object. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area is titled 'Fields & Relationships' with a sub-header '8 Items, Sorted by Field Label'. A red arrow points to the 'Fields & Relationships' link in the left sidebar. Another red arrow points to the 'New' button at the top right of the list table. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data rows include: Amount (Amount\_c, Formula (Currency)), Created By (CreatedByUserId, Lookup(User)), Last Modified By (LastModifiedByUserId, Lookup(User)), Name (Name\_c, Master-Detail(Customer)), Payment ID (Payment\_ID\_c, Number(18, 0)), Payment Mode (Payment\_Mode\_c, Picklist), Payment no (Name, Auto Number), and Room Booking (Room\_Booking\_c, Lookup(Room Booking)).

3. Select Data Type as a “Picklist”

The screenshot shows the 'Data Types' selection dialog for the 'Payment1' object. The left sidebar lists various field types: Checkbox, Currency, Date, DateTime, Email, Geolocation, Number, Percent, Phone, Picklist (selected and highlighted with a red box), Picklist (Multi Selected), Text, Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), and Time. The right pane provides a detailed description for each type. The 'Picklist' entry is described as 'Allows users to select a value from a list you define'. A red arrow points to the 'Picklist' entry.



4. Fill the Above as following:

- Field Label: Payment Mode
- Value - Select enter values with each value separated by a new line
  1. Cash
  2. Check
  3. Credit card
  4. Debit card
  5. UPI
  6. Phonepe
  7. Gpay
  8. Paytm
- Select required
- Click on Next > Next > Save and new.

#### Cross Object Formula Field:

In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

#### Why do we need to create the Cross Object Formula Field:

If we want to get the Particular field from another object in that case we will use the Cross object Formula field. For that First we need to create the relationship b/w two objects and relate the field with formula data type.

#### 4. Create a Cross object formula Field in Payment1 Object

1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > New

Setup > Object Manager > Payment1

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer)		
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number		
Room Booking	Room_Booking__r	Lookup(Room Booking)		

3. Select Data Type as a "Formula"
4. Click on Next
5. Enter the Field label: Amount and Field name: gets auto generated and click on Next
6. In the Advanced Formula Click on the Insert field in the popup Screen Select the Payment1 and in the second drop down select the Room Booking and in the three drop down select the Amount field and click on Insert " Room\_Booking\_\_r.Amount\_\_c ".

Setup > Object Manager > Payment1

New Custom Field

Step 3. Enter formula

Enter your formula and click Check Syntax to check it!

Example: Gross Margin = Amount - Cost

Simple Formula Advanced Formula

1 **Insert Field**

2 **Advanced**

3 **Room Booking**

4 **Amount**

5 **Insert**

7. Click on the Check syntax: No syntax errors in merge fields
8. Click on Next > Next > Save and new.

## 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 Customer1 object and click on Next
6. Fill the Above as following:

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

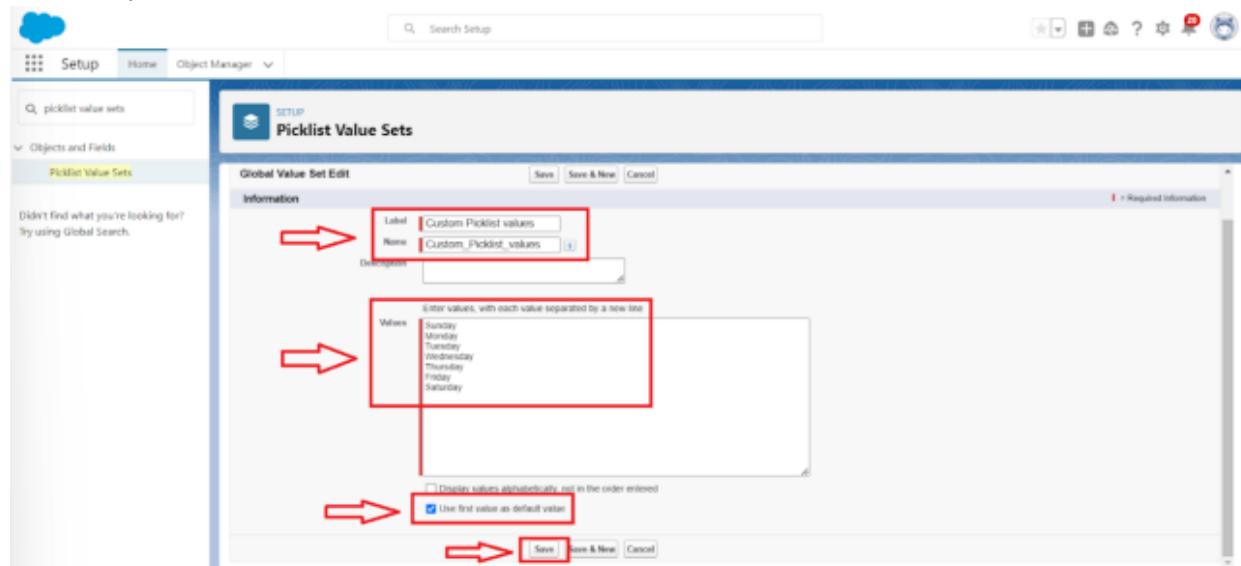
Picklist value sets:

Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value 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. First click on gear icon and click on setup
2. Click on home tab in the Quick find box search for the " Picklist value sets "
3. Click on the Picklist value set and click on 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 default value and Click on save.

## Creation of fields for the Feedback object

### 1. create fields & relationship to an object:

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

SETUP > OBJECT MANAGER  
Feedback

Details

**Fields & Relationships**

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

Fields & Relationships

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

Created By	CreatedById	Lookup(User)	
Feedback No	Name	Auto Number	✓
Food	Food__c	Picklist	
Houscleaning	Houscleaning__c	Picklist	
Internet	Internet__c	Picklist	
Last Modified By	LastModifiedById	Lookup(User)	
Name	Name__c	Lookup(Customer1)	✓
Owner	OwnerId	Lookup(User,Group)	✓
Suggestion	Suggestion__c	Text Area(255)	

3. Select Data Type as a "Lookup Relationship"
4. Click on Next
5. Click on the Related to drop down and Select the Customer1 object and click on Next

SETUP > OBJECT MANAGER  
Feedback

Details

Fields & Relationships

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

New Relationship

Step 2. Choose the related object

Select the other object to which this object relates

Related To: Customer1

Customer1

D&B Company

Customer

6. Fill the Above as following:
  - Change the Field Label: Name
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new
2. To create Another fields in an Same object:
  1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.
  2. Now click on "Fields & Relationships" > New

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback No	Name	Auto Number		
Food	Food__c	Picklist		
Houscleaning	Houscleaning__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer)		
Owner	OwnerId	Lookup(User/Group)		
Suggestion	Suggestion__c	Text Area(255)		

### 3. Select Data Type as a "Picklist"

### 4. Click on Next

**Field Label:** Roomcleaning

**Under Values:** Enter values, with each value separated by a new line

**Values:**

- Good
- Satisfaction
- Bad

### 5. Fill the Above as following:

- Field Label: Roomcleaning
- Field Name :It's gets auto generated
- Under Values select Enter values, with each value separated by a new line

1. Good

2. Satisfaction

3. Bad

- Click on Next > Next > Save and new.

### 3. To create a Another Fields in an Same Object

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

2. Now click on "Fields & Relationships" ? New

3. Select Data Type as a "Picklist"
  4. Click on Next
  5. Fill the Above as following:
    - Field Label: Internet
    - Field Name :It's gets auto generated
    - Under Values select Enter values, with each value separated by a new line
  1. Good
  2. Satisfaction
  3. Bad
- Click on Next > Next > Save and new.

**4. To create a Another Fields in an Same Object**

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

2. Now click on "Fields & Relationships" ? New

3. Select Data Type as a "Picklist"

4. Click on Next

5. Fill the Above as following:

- Field Label: Food
- Field Name :It's gets auto generated
- Under Values select Enter values, with each value separated by a new line

1. Good

2. Satisfaction

3. Bad • Click on Next > Next > Save and new.

**5. To create a Another Fields in an Same Object**

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

2. Now click on "Fields & Relationships" > New

3. Select Data Type as a "Text area"

4. Click on Next

5. Fill the Above as following:

- Field Label: Suggestion
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new. Creation of fields for the Total Rooms object

**1. To create fields in an object:**

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

2. Now click on "Fields & Relationships" > New

3. Select Data type as a "Formula" and Click on Next

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

- Number (selected)
- Auto Number
- Formula 3
- Roll-Up Summary
- Lookup (Relationship)
- Master-Detail Relationship

Select one of the data types below:

A custom-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. This formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master"), where the relationship field is required on all detail records.

4. Fill the Above as following:
5. Field Label: Rooms Available
6. Field Name : It's gets auto generated
7. Select the Formula Return Type as “Number”
8. Select the Decimal places as “0” and Click on Next

**Field Label** Rooms Available Field Name: Rooms\_Available 4

Add this field to existing custom report types that contain this entity Previous | Next | Cancel

**Formula Return Type**

- None Selected
- Checkbox
- Currency
- Date
- DateTime
- Number 5
- Percent
- Text
- Time

Select one of the data types below:

Calculate a boolean value.  
Example: `ISDRAFT = 1` OR `ISRECORDTYPE = 'Opportunity'`

Calculate a decimal currency amount and automatically format the field as a currency amount.  
Example: `(100 * Margin) + Amount - Err1_LC`

Calculate a date, for example, by adding or subtracting days to other dates.  
Example: `ReminderDate = CloseDate - 7`

Calculate a datetime, for example, by adding a number of hours or days to another datetime.  
Example: `EstimatedTime = 18 * CloseDate - 2 * 32`

Calculate a numeric value.  
Example: `EstimatedTime = 18 * CloseDate - 2 * 32`

Calculate a percent and automatically add the percent sign to the number.  
Example: `Discount = (Amount_Discounted / Amount) * 100`

Create a text string, for example, by concatenating other text fields.  
Example: `Full Name = LastName & ", " & FirstName`

Calculate a time, for example, by adding a number of hours to another time.  
Example: `Next = TIMEADD(Now, 1)`

**Decimal Places** 0 6 Examples: 100

Note: I am Considering “Total No Of Rooms = 30” While creating a new record in Total Rooms Object.

9. Click on the Advanced Formula “ 30 - Rooms\_Booked\_\_c ” and Check Syntax
10. Click on Next > Next > Save and new.

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

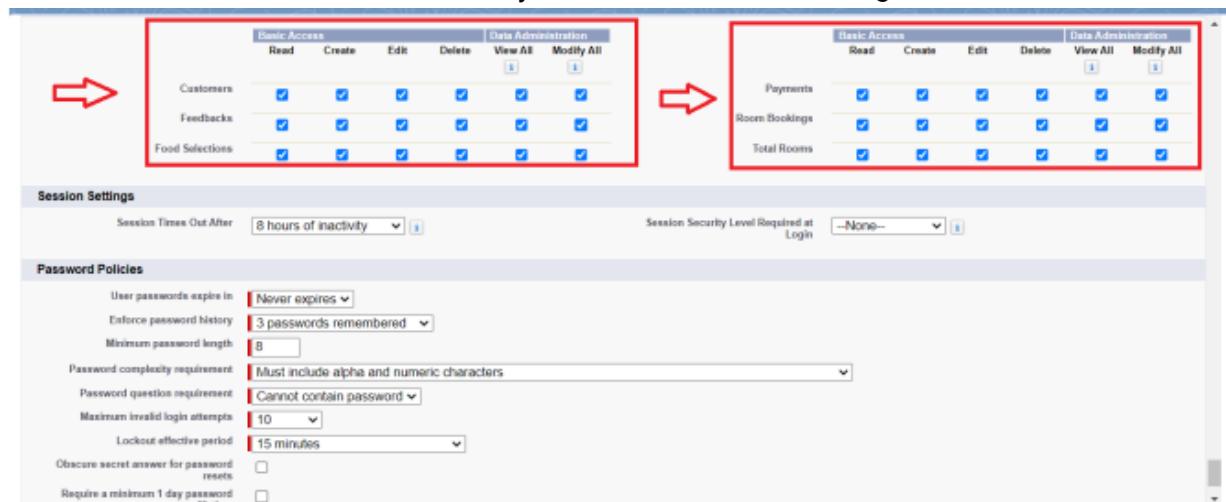
## 2. Custom Profiles:

Custom ones defined by us. They can be deleted if there are no users assigned with that particular one.

### Custom user Profile

#### To create a 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
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.



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 platform User1) > 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					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Feedbacks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Food Selections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Basic Access					Data Administration	
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Room Bookings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Total Rooms	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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

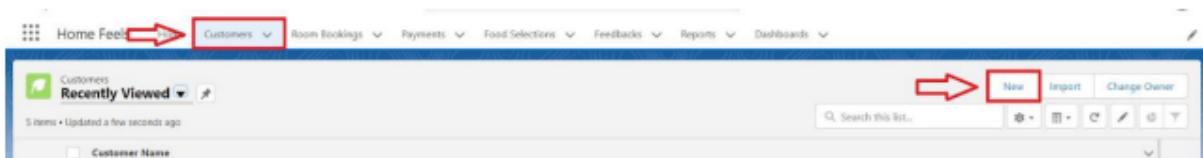
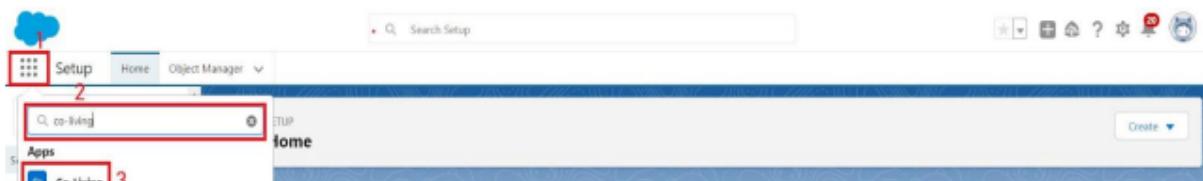
- User passwords expire in: Never expires
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obfuscate secret answer for password resets:
- Require a minimum 1 day password lifetime:

5. Scroll down and Click on Save.

## 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 Customer Tab.
4. Click on any record 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 delete and delete again.

## Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

### Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

### Create Report

1. Go to the app > click on the reports tab
2. Click New Report.

3. Select report type from category or from report type panel or from search panel "Customers with Room Bookings with Total Rooms" > click on start report.
4. Customize your report
5. Add fields from left pane as shown below.
6. Save or run it.

### Create another Report

1. Go to the app > click on the reports tab
2. Click New Report.

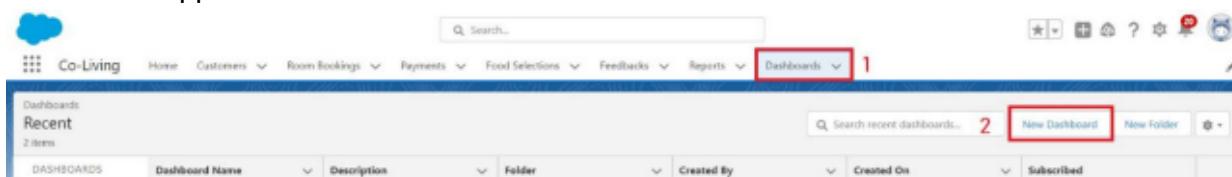
3. Select report type from category or from report type panel or from search panel Select customer with Room booking with Payments ? click on start report.
4. Customize your report
5. Add fields from left pane as shown Above
6. Save or run it.

## Dashboards

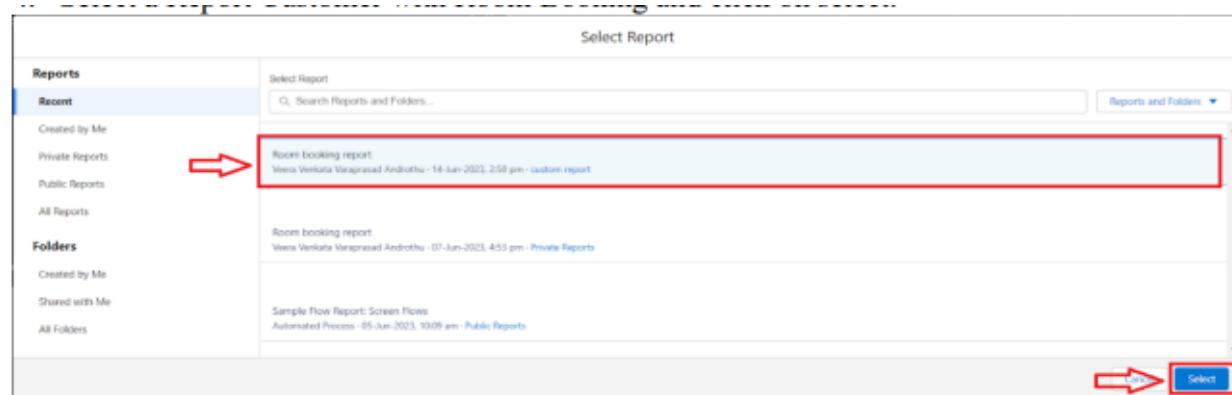
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

[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.

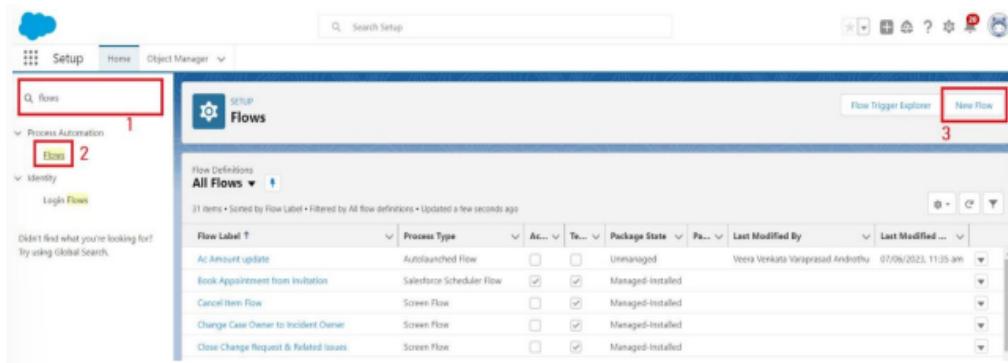
### Why do we need to create a flow:

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".
5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.
6. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the

"Decision Element".



7.Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.

8.Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Single sharing.
- Click on "Add Condition"
- Resource: Select Record.AC-3000.
- Operator: Select Equals. • Value: Select False.
- Click on "+" Symbol In the Outcome Order.

New Decision

Label	* API Name																						
Field Should be Update	Field_Should_be_Update																						
Description	1																						
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.																							
OUTCOME ORDER	2																						
Single Sharing	4																						
Default Outcome	<table border="1"> <tr> <td>* Label</td> <td>* Outcome API Name</td> </tr> <tr> <td>Single Sharing</td> <td>Single_Sharing</td> </tr> <tr> <td colspan="2">Condition Requirements to Execute Outcome</td> </tr> <tr> <td colspan="2">All Conditions Are Met (AND)</td> </tr> <tr> <td colspan="2"> <table border="1"> <tr> <td>Resource</td> <td>Operator</td> <td>Value</td> </tr> <tr> <td>\$Record &gt; Room sharing</td> <td>Equals</td> <td>single sharing</td> </tr> <tr> <td colspan="2">AND</td> <td>False</td> </tr> <tr> <td colspan="3">+ Add Condition</td> </tr> </table> </td> </tr> </table>	* Label	* Outcome API Name	Single Sharing	Single_Sharing	Condition Requirements to Execute Outcome		All Conditions Are Met (AND)		<table border="1"> <tr> <td>Resource</td> <td>Operator</td> <td>Value</td> </tr> <tr> <td>\$Record &gt; Room sharing</td> <td>Equals</td> <td>single sharing</td> </tr> <tr> <td colspan="2">AND</td> <td>False</td> </tr> <tr> <td colspan="3">+ Add Condition</td> </tr> </table>		Resource	Operator	Value	\$Record > Room sharing	Equals	single sharing	AND		False	+ Add Condition		
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9.Enter the Outcome Details Label: Double sharing, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Double sharing.
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select False.
- Click on “+” Symbol In the Outcome Order.

10. Enter the Outcome Details Label: Triple sharing, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Triple sharing.
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select False.
- Click on “+” Symbol In the Outcome Order.

11. Enter the Outcome Details Label: Single Ac, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Single sharing.
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select True.
- Click on “+” Symbol In the Outcome Order.

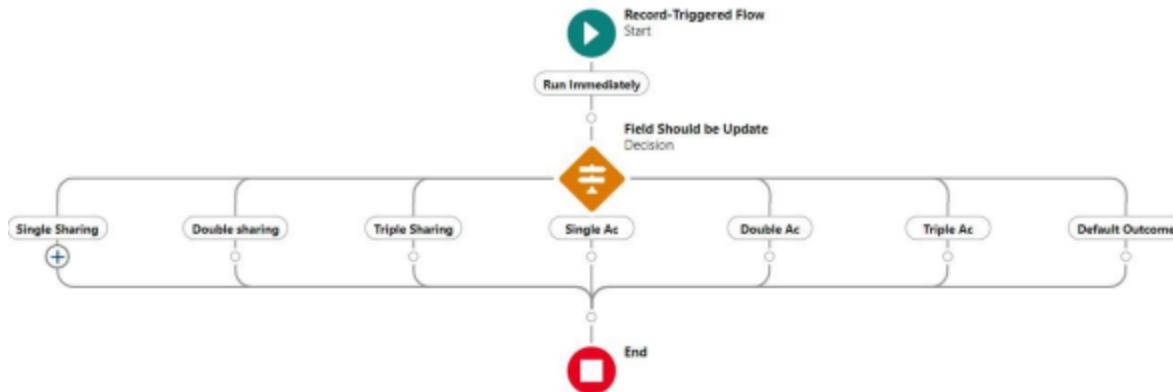
12. Enter the Outcome Details Label: Double Ac, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Double sharing.
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select True.
- Click on “+” Symbol In the Outcome Order.

13. Enter the Outcome Details Label: Triple Ac, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.

- Operator: Select Equals.
- Value: Select Triple sharing.
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select True.
- Click on Done.



14. Click on “+” Symbol under the single sharing and Select the “update Records” in the drop down list.

15. Enter the update records details

- Label: Single.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 28000.
- Click on Done.

16. Enter the update records details

- Label: Double.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 24000.
- Click on Done.

17. Enter the update records details

- Label: Triple.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 20000.
- Click on Done.

18. Enter the update records details

- Label: Single ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 34000.
- Click on Done.

19. Enter the update records details

- Label: Double ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 30000.
- Click on Done.

20. Enter the update records details

- Label: Triple ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 26000.
- Click on Done.

21. The Flow will Form like This and Click on save.



22. Enter the Flow Label: Update Amount Field, Flow API Name: Gets Automatically Generated and Click 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. Moreover, the feedback feature will empower residents to provide insights into the quality of services, such as room cleaning, internet connectivity, and food services, which will help maintain and improve service standards. Overall, this CRM system will not only foster a seamless living experience but also reinforce the values of collaboration, comfort, and community that are at the core of the co-living concept. By balancing privacy and communal living, the application will support the creation of a vibrant and inclusive environment, allowing individuals to connect, thrive, and enhance their quality of life.