

# A CRM Application To Manage The Booking of Co-Living

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## PROJECT REPORT

Submitted by

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*In partial fulfillment of the award of the degree of*

**BACHELOR OF ENGINEERING**

**COMPUTER SCIENCE AND ENGINEERING**

**AVS ENGINEERING COLLEGE**

**AMMAPET, SALEM- 636 003**

**ANNA UNIVERSITY :: CHENNAI 600 025**

## **BONAFIDE CERTIFICATE**

Certified that this project report “**A CRM Application To Manage The Booking of Co-Living**” is the bonafide work of “**ARAVIND V (au620120104006), KARUTHA PANDIAN S(au620120104035), HARIHARAN D(au620120104028),GEORGE ANAND A(au620120104023),BALAJI M(au620120104011)**” who carried out the project work under my supervision.

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# **CHAPTER-1**

## **PROJECT SPECIFICATION**

- Project Goal**

The primary goal of this project is to implement a CRM application for managing the booking and operational processes of our co-living spaces. This system aims to streamline booking procedures, enhance customer experiences, improve operational efficiency, and ultimately boost revenue.

- Implement a CRM application customized for co-living management.
- Streamline booking procedures, enhance customer experiences, improve operational efficiency, and drive revenue growth.
- Enhance customer service and experience by offering personalized services, special promotions, and improved communication.
- Optimize inventory management to prevent shortages and surpluses, thereby reducing operational costs and improving product availability.
- Increase overall operational efficiency through automated sales processes and better task management.

### **1.2 Project Scope**

This project encompasses a comprehensive range of activities. It includes the assessment of our current operational challenges and customer service deficiencies. We will explore and evaluate various CRM solutions to select the one best suited to our gas station's unique requirements and budget. The selected CRM will be customized to meet our specific needs, encompassing data fields, workflows, and reporting capabilities:

- Needs Assessment: Identify challenges in co-living management.
- CRM Selection: Choose a CRM platform aligned with co-living requirements.

- Customization: Adapt the CRM system for co-living processes.
- Data Migration: Migrate existing data accurately.
- Staff Training: Train co-living staff for proficient CRM use.
- Change Management: Strategies for user adoption.
- Ongoing Support: Maintain an efficient CRM system.

### **1.3 Problem Statement Definition**

<b>Problem for</b>	<b>Trying to</b>	<b>But</b>	<b>Which makes</b>
<b>Employee</b>	Challenges include manual and time-consuming booking procedures leading to errors.	Inconsistent communication with residents and potential tenants.	Operational inefficiencies impacting the ability to provide a seamless co-living experience.

## **1.4 Empathy Map Canvas**

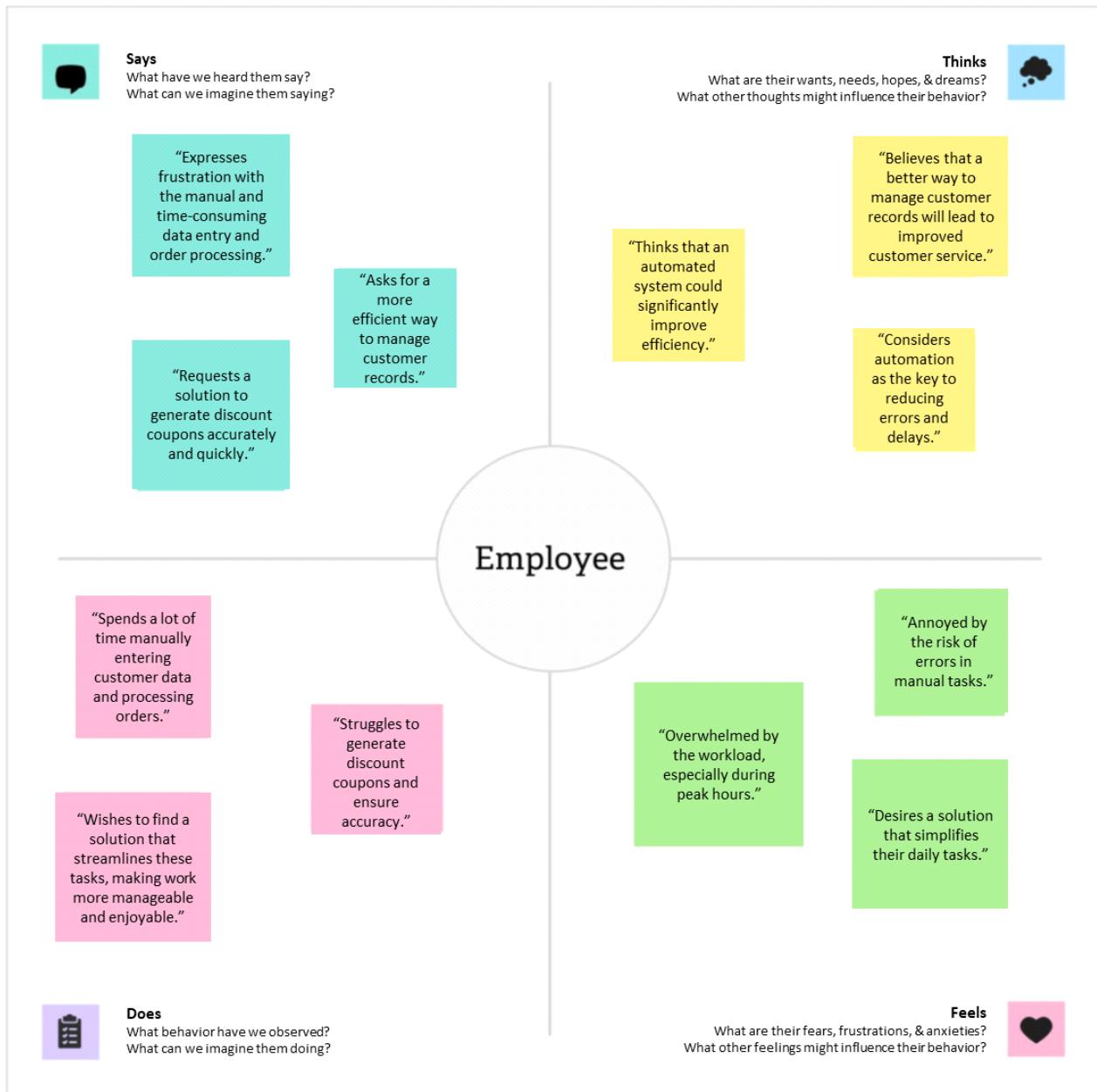
An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it.

Understand perspectives, needs, emotions, and concerns of co-living residents, potential tenants, staff, and stakeholders.

The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.

Continuing from the previous section, the empathy map canvas will provide a more comprehensive insight into the needs, emotions, pain points, and goals of customers, employees, and stakeholders. It will also explore potential solutions to address their concerns effectively.



## Proposed Solution

S. No	Parameter	Description
1.	<b>Says</b>	In this section, you document what the stakeholder says. This includes their statements, comments, and feedback related to the project. It helps you understand their verbal expressions and concerns

2.	<b>Thinks</b>	Here, you explore what the stakeholder might be thinking. This includes their thoughts, concerns, or goals that may not be openly expressed. It helps uncover their underlying motivations.
3.	<b>Pains</b>	Document the pain points or challenges that the stakeholder experiences. This could include frustrations, obstacles, or difficulties they encounter in the context of the project.
4.	<b>Gains</b>	This aspect highlights the potential benefits, desires, and goals that individuals or groups hope to achieve or experience as a result of the situation or project.
5.	<b>Feels</b>	This parameter addresses the stakeholder's emotional state. It helps you identify their emotions, such as joy, frustration, or anxiety, related to the project or situation.
6.	<b>Does</b>	This section describes the actions or behaviors of the stakeholder. It helps you understand their practical actions, routines, or interactions related to the project.

- **Functional & Technical Requirements**

- Functional Requirements

Requirement	Description
<b>Customer Data Management</b>	The CRM system should allow for the centralized management of customer information, including contact details, purchase history, and preferences.
<b>Personalized Customer Service</b>	The system should support the ability to create and manage customer profiles, enabling us to provide personalized services, special promotions, and targeted offers.
<b>Inventory Management</b>	Real-time inventory tracking and automated restocking processes should be integrated to optimize inventory management. This should prevent shortages, reduce operational disruptions, and control inventory costs..
<b>Automated Sales Processes</b>	The CRM system should facilitate automated sales processes, including order processing and payment, to ensure a smooth and error-free customer experience.
<b>Reporting and Analytics:</b>	Comprehensive reporting and data analytics features should be available to provide insights into customer behavior, sales trends, and inventory management. This will support data-driven decision-making.
<b>Integration Capabilities</b>	The CRM system should offer integration options with other systems used at the gas filling station, including accounting and financial software. Seamless integration will ensure a cohesive operational environment.

- Technical Requirements

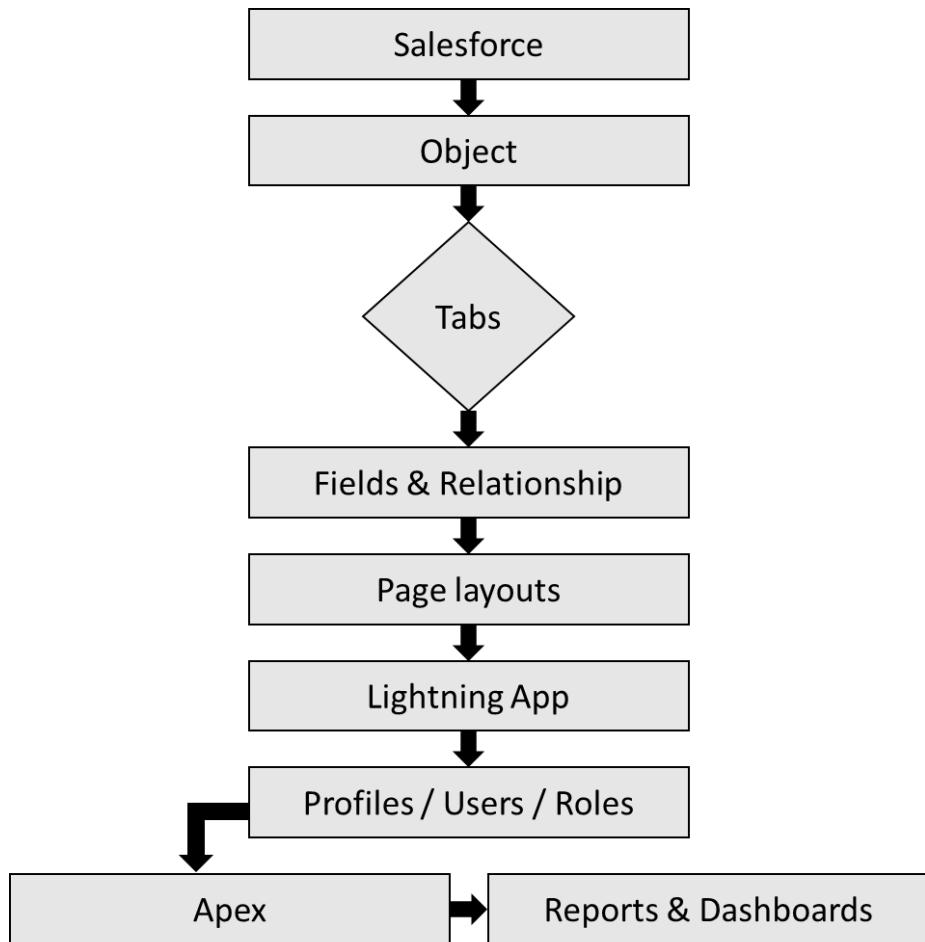
Requirement	Description
<b>Scalability:</b>	The CRM system should be scalable to accommodate the potential growth of our business. It should handle an increasing volume of customer data and transactions without performance degradation.
<b>Data Security</b>	Robust data security measures, such as encryption and access controls, should be in place to protect sensitive customer information and transaction data.
<b>Data Backup and Recovery</b>	The CRM system should have a reliable data backup and recovery mechanism to safeguard against data loss in case of system failures or errors.
<b>Cloud-Based or On-Premises</b>	The choice between a cloud-based or on-premises CRM system should be evaluated based on our specific infrastructure and data management requirements.
<b>User-Friendly Interface</b>	The system should feature a user-friendly interface to ensure ease of use and rapid adoption by our staff..
<b>Technical Support and Updates</b>	Ongoing technical support, system maintenance, and regular updates should be provided to keep the CRM system up to date and secure.

## 1.7 Project Road Map

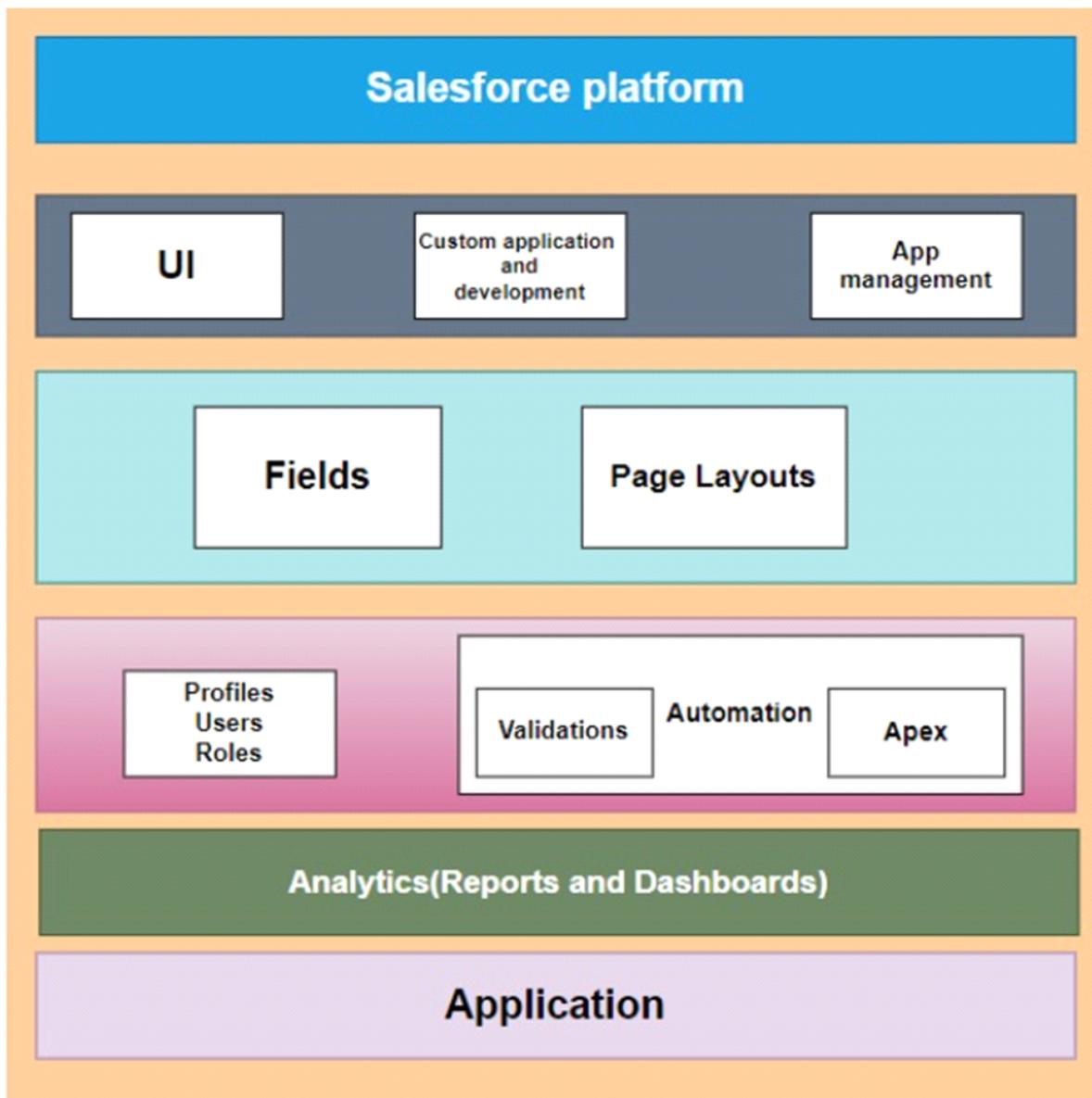
### 1.7.1 Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data

enters and leaves the system, what changes the information, and where data is stored.



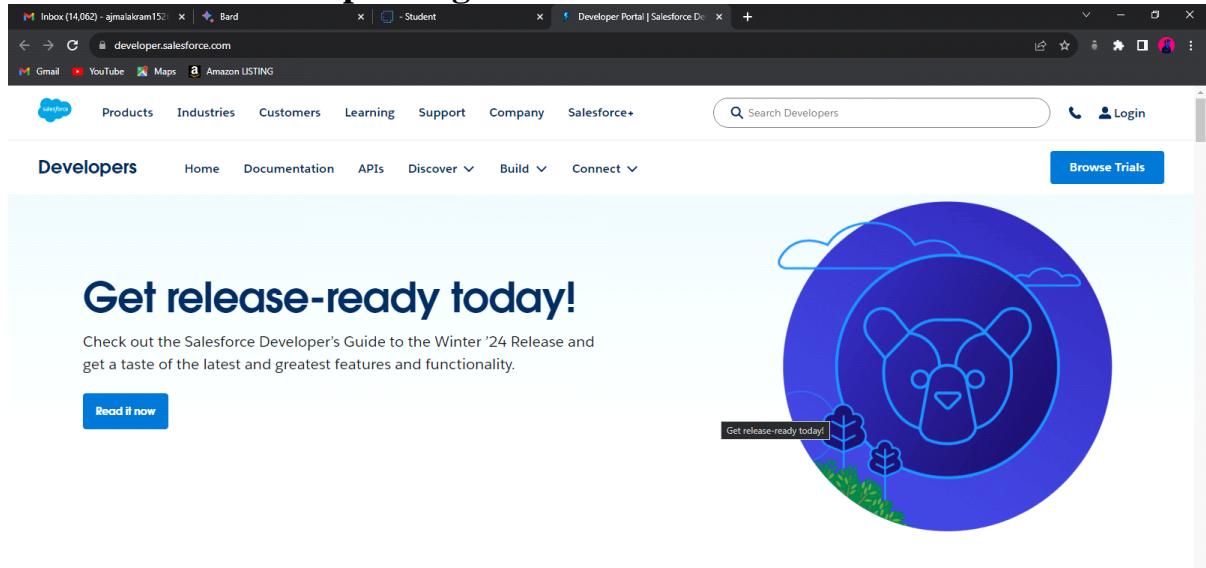
### 1.7.2 Technical Architecture



# CHAPTER-2

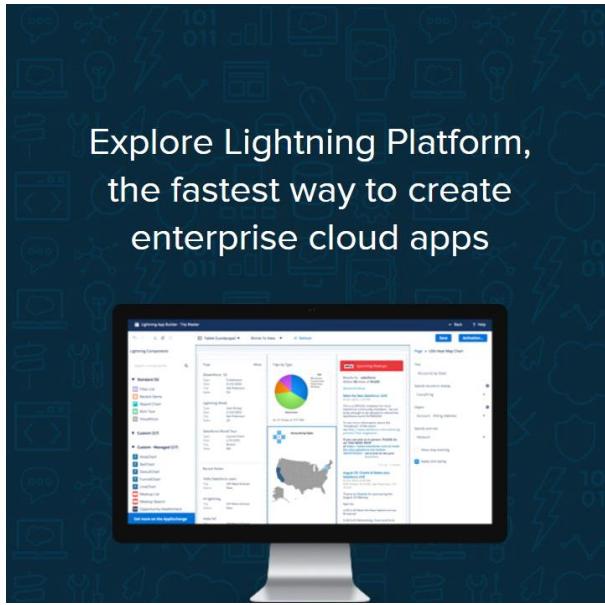
## PREPARATION DATA MODELING

### 2.1 Salesforce Developer Org



### Latest Developer News

Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.



**Explore Lightning Platform,  
the fastest way to create  
enterprise cloud apps**

Get your very own Developer Edition

A full-featured copy of Lightning Platform, for FREE.

Name

First  Last

Email

Your email address

Role

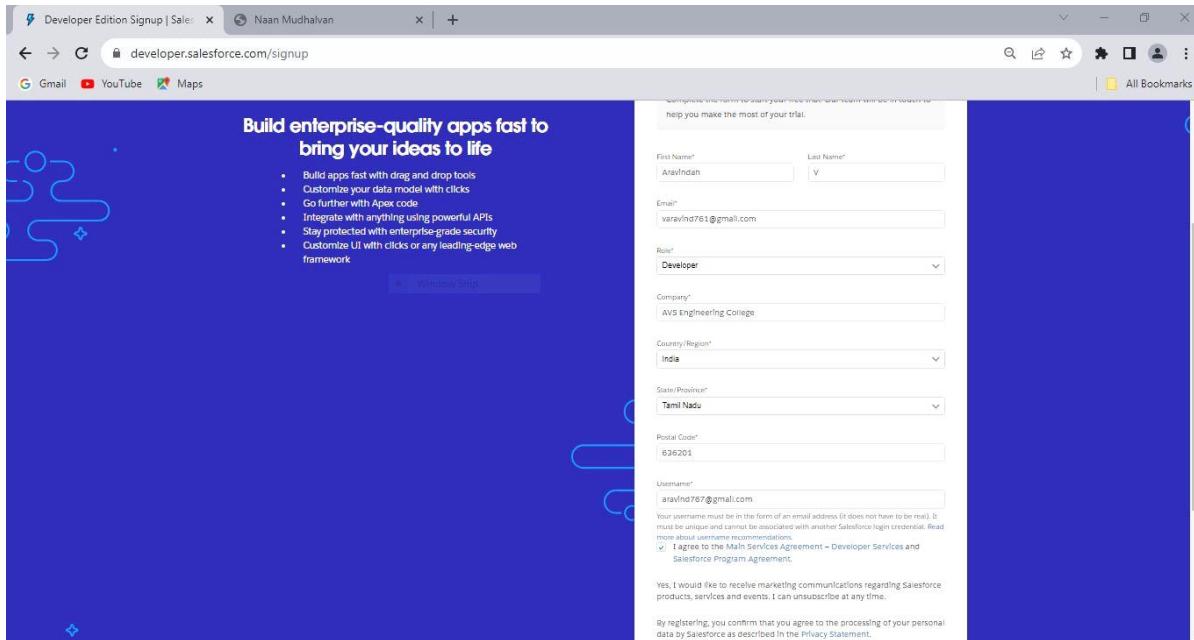
Your job role

Company

Company Name

Country

## Account Activation



Developer Edition Signup | Salesf... Naan Mudhalvan

developer.salesforce.com/signup

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Windows 8

First Name\*  Last Name\*   
Aravindan

Email\*  varavind76@gmail.com

Role\*  Developer

Company\*  AVS Engineering College

Country/Region\*  India

State/Province\*  Tamil Nadu

Postal Code\*  636201

Username\*  aravind76@gmail.com

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations.

I agree to the [Service Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

Yes, I would like to receive marketing communications regarding Salesforce products, services and events. I can unsubscribe at any time.

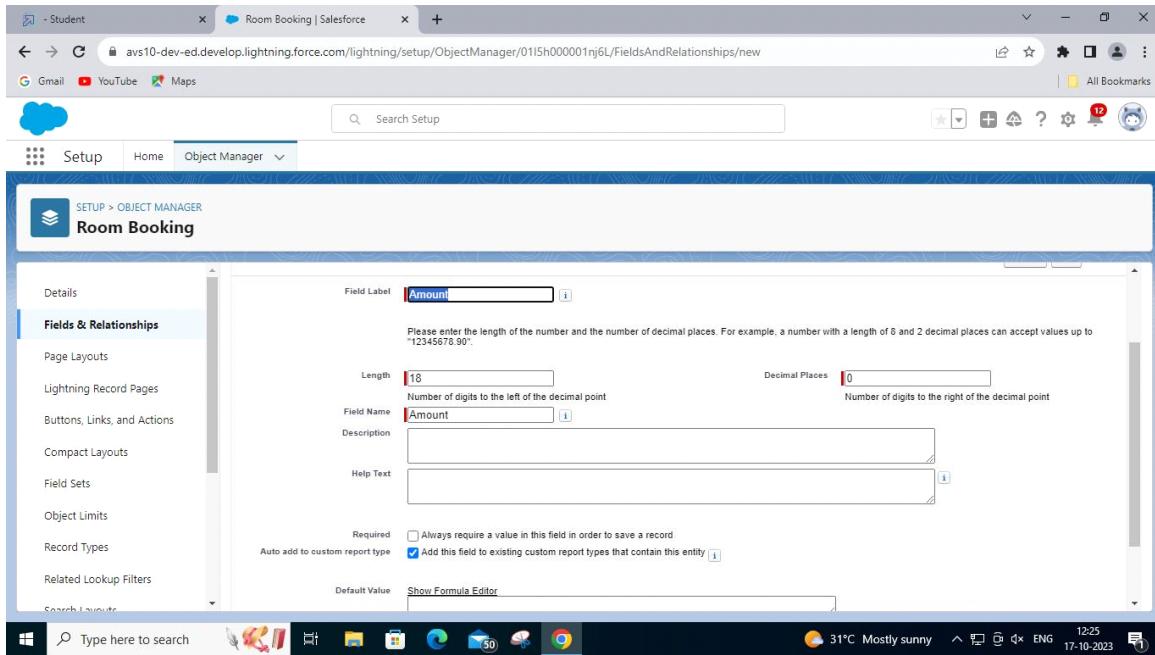
By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

Activation tracks information about devices from which users have verified their identity.

## 2.2 Object Creation

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc. Custom objects: Our\_Customers, Consultants, Retailers, Others.

### Create the Consultants Object



Screenshot of the Salesforce Setup interface showing the creation of a new custom field named "Amount".

The "Field Label" is set to "Amount" and the "Field Name" is also "Amount".

The "Formula Return Type" section is expanded, showing options for Checkbox, Currency, Date, Date/Time, and Number. Examples for each type are provided.

The left sidebar shows the "Fields & Relationships" tab selected under "Payment1". Other tabs include Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters.

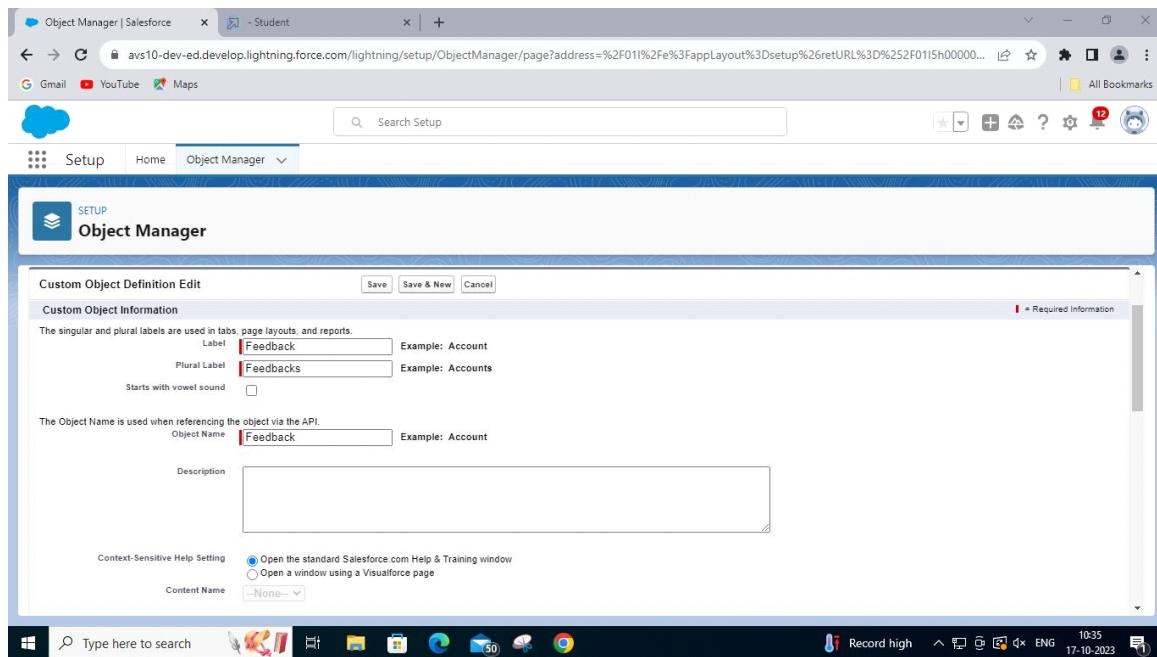
Screenshot of the Salesforce Setup interface showing the creation of a new custom object named "Payment1".

The "Label" is set to "Payment1" and the "Plural Label" is "Payments".

The "Object Name" is also "Payment1".

The "Description" field is empty.

A message at the top states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." with links to "Tell me more!" and "Don't show this message again".



## 2.4 Tabs

In Salesforce, tabs define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

### Select the Consultant Layout page layout

Salesforce Tabs Setup

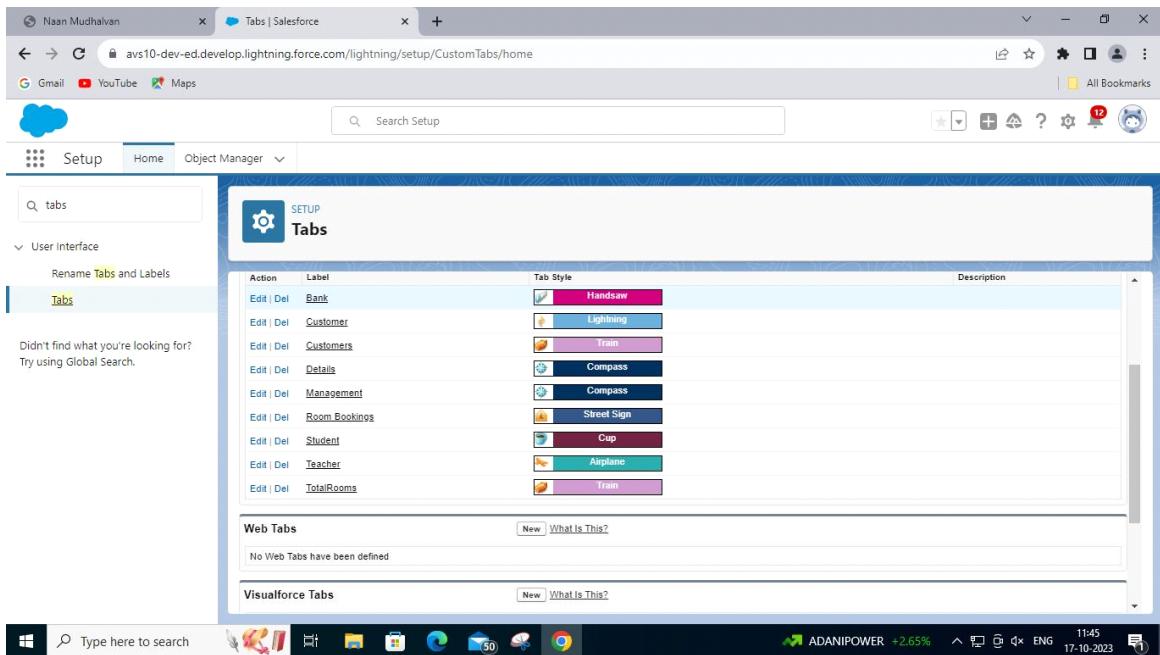
The screenshot shows the Salesforce Tabs setup process. The user is creating a new custom tab for the 'Customer' object, choosing the 'Factory' tab style, and leaving the splash page custom link set to 'None'. A short description is also provided.

**Custom Object Tabs**

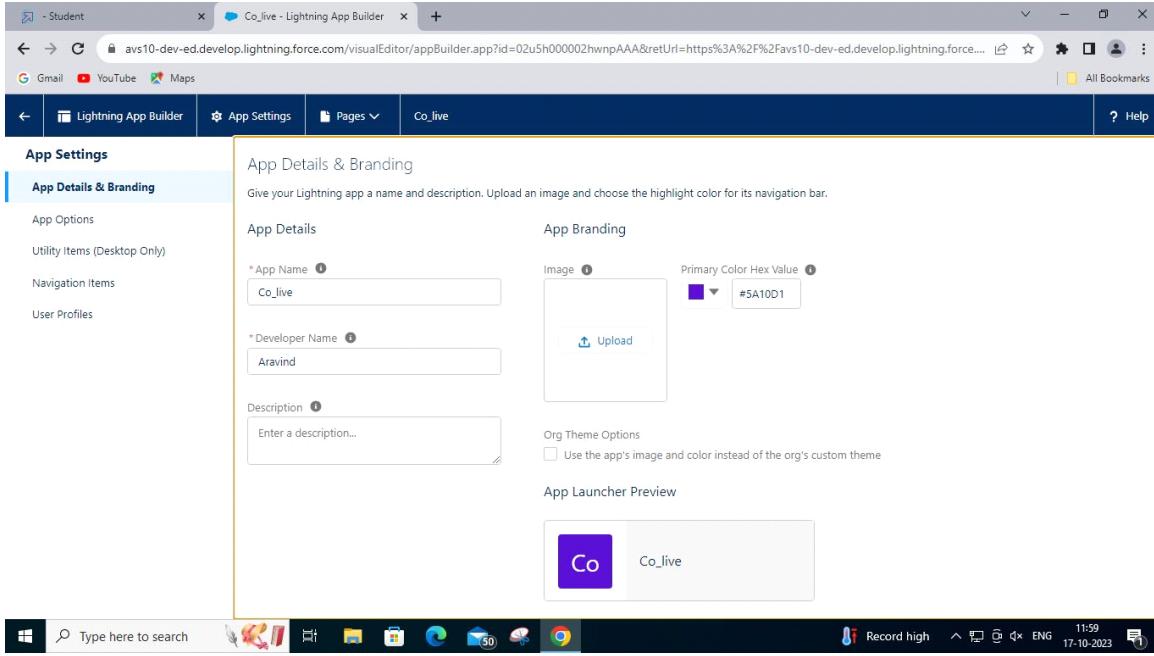
Action	Label	Tab Style	Description
Edit   Del	Bank	Handsaw	
Edit   Del	Customer	Lightning	
Edit   Del	Details	Compass	
Edit   Del	Management	Compass	
Edit   Del	Student	Cup	
Edit   Del	Teacher	Airplane	

## 2.5 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.



## 2.4 The Lightning App



## 2.3 Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

## **Fields in Our\_Objects**

Student - Room Booking | Salesforce

av10-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Ish000001nj6L/FieldsAndRelationships/view

G Gmail YouTube Maps All Bookmarks

Cloud icon Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Room Booking

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

Fields & Relationships 12 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
AC-3000	AC_3000__c	Checkbox		
Advance Payment for 1 Month	Advance_Payment_for_1_Month__c	Checkbox		
Amount	Amount__c	Currency(18, 0)		
Check In	Check_In__c	Checkbox		
Check Out	Check__c	Checkbox		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		

Type here to search 31°C Partly sunny 12:41 17-10-2023

Object Manager | Salesforce - Student

av10-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01I%2Fe%3FappLayout%3Dsetup%26retURL%3D%25F01Ish0000... All Bookmarks

G Gmail YouTube Maps

Cloud icon Search Setup

Setup Home Object Manager

SETUP Object Manager

New Custom Object

Help for this Page

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

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

Label: Room Booking Example: Account

Plural Label: Room Bookings Example: Accounts

Starts with vowel sound:

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

Object Name: Room Example: Account

Description:

Type here to search 28°C Mostly sunny 10:26 17-10-2023

## Fields in Retailers Objects

The screenshot shows the Salesforce Object Manager interface for the 'retailer' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays a table of fields under the heading 'Fields & Relationships'. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields listed include Created By (CreatedBy), Delivery type (Delivery\_type\_\_c), Last Modified By (LastModifiedBy), our\_customer (our\_customer\_\_c), Payment (Payment\_\_c), products (product\_\_c), retailer Name (Name), retailer\_id (retailer\_id\_\_c), retailer\_mail (retailer\_mail\_\_c), and retailer\_number (retailer\_number\_\_c).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Delivery type	Delivery_type__c	Picklist		
Last Modified By	LastModifiedBy	Lookup(User)		
our_customer	our_customer__c	Master-Detail(our_customer)		
Payment	Payment__c	Picklist		
products	product__c	Picklist (Multi-Select)		
retailer Name	Name	Text(80)		
retailer_id	retailer_id__c	Auto Number		
retailer_mail	retailer_mail__c	Email		
retailer_number	retailer_number__c	Number(18, 0)		

## Fields in Others Objects

The screenshot shows the Salesforce Object Manager interface for the 'Others' object. The left sidebar lists various setup options. The main content area displays a table of fields under the heading 'Fields & Relationships'. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields listed include Coupon (Coupon\_\_c), Created By (CreatedBy), Employee (Employee\_\_c), Last Modified By (LastModifiedBy), Other Name (Name), and Owner (OwnerId).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Coupon	Coupon__c	Text(15)		
Created By	CreatedBy	Lookup(User)		
Employee	Employee__c	Picklist		
Last Modified By	LastModifiedBy	Lookup(User)		
Other Name	Name	Text(80)		
Owner	OwnerId	Lookup(User,Group)		

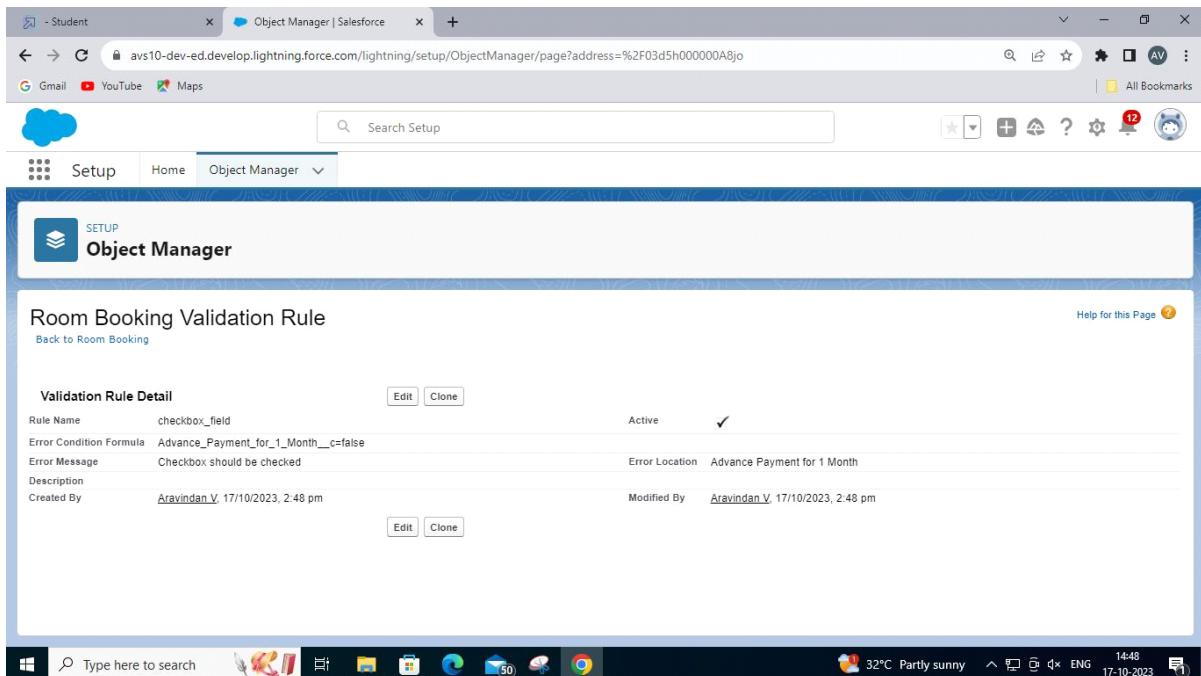
# CHAPTER-3

## USERS & DATA SECURITY

### 3.1 Validation Rule

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A 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.

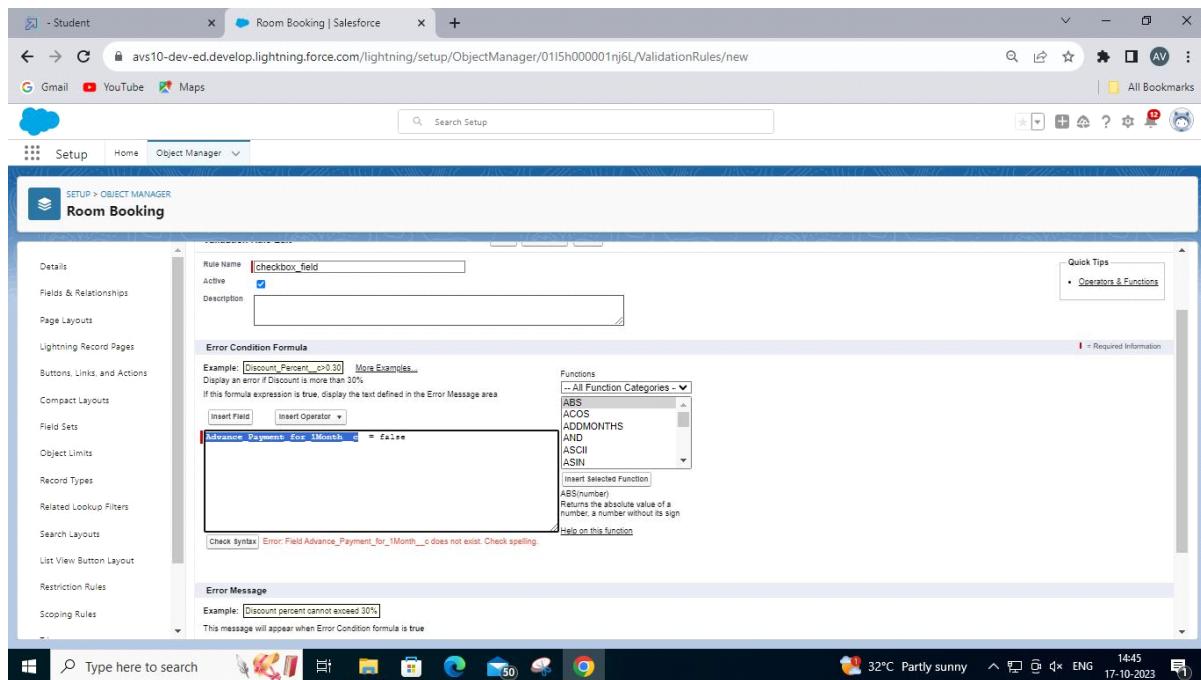
### Creating a Profiles



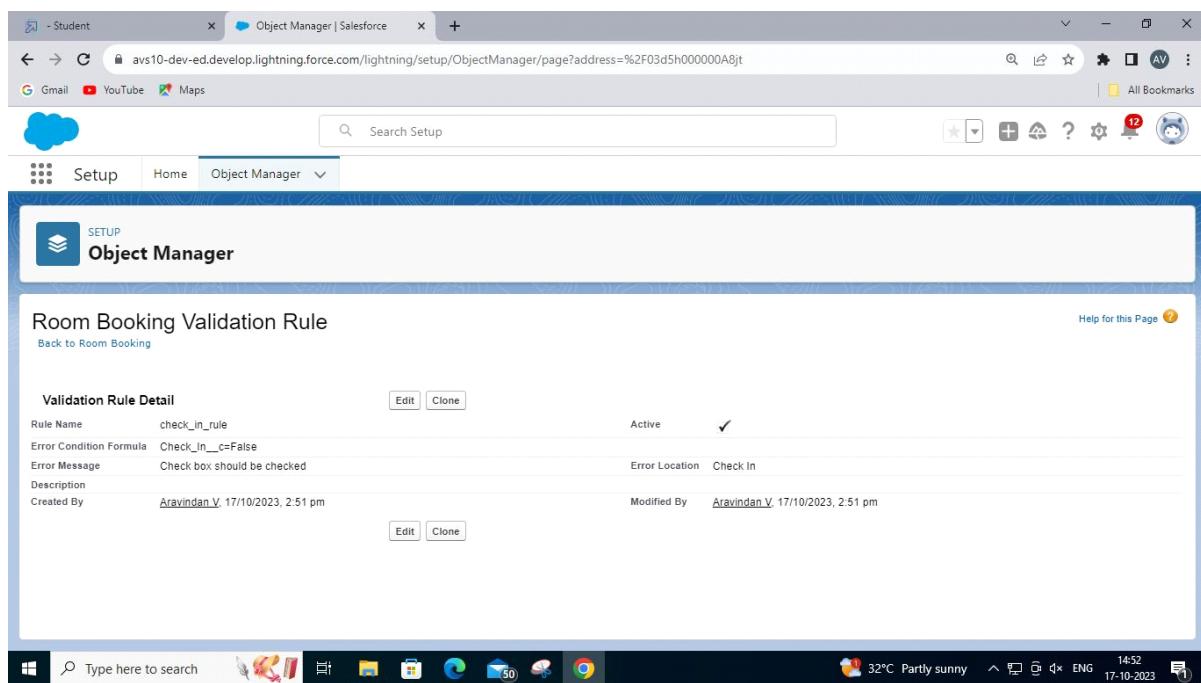
The screenshot shows the Salesforce Object Manager page for a 'Room Booking Validation Rule'. The page title is 'Room Booking Validation Rule' and the sub-page title is 'Validation Rule Detail'. The validation rule details are as follows:

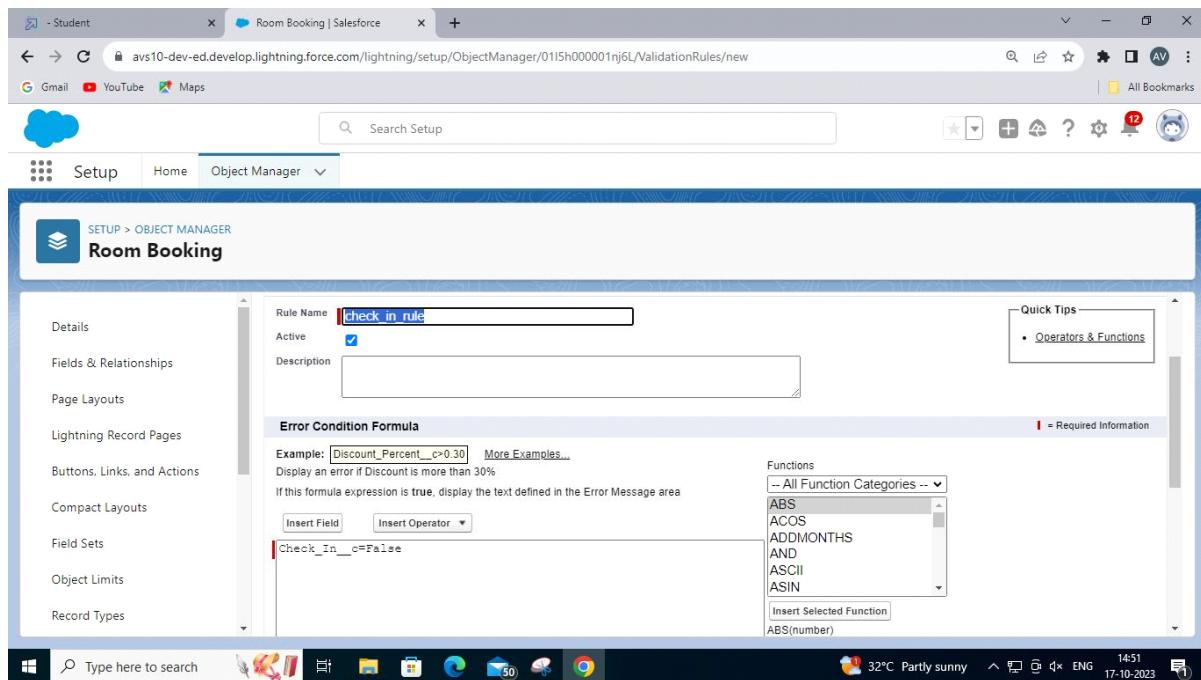
Rule Name	checkbox_field	Active
Error Condition Formula	Advance_Payment_for_1_Month__c=false	✓
Error Message	Checkbox should be checked	Error Location
Description		Advance Payment for 1 Month
Created By	Aravindan_V 17/10/2023, 2:48 pm	Modified By
		Aravindan_V 17/10/2023, 2:48 pm

The page also includes standard Salesforce navigation buttons like 'Edit' and 'Clone' at the top and bottom of the detail section. The browser address bar shows the URL: 'avs10-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03d5h000000A8jo'. The operating system taskbar at the bottom shows various application icons and the date/time: '17-10-2023 14:48'.



## To create a new profile (Store Supervisor)

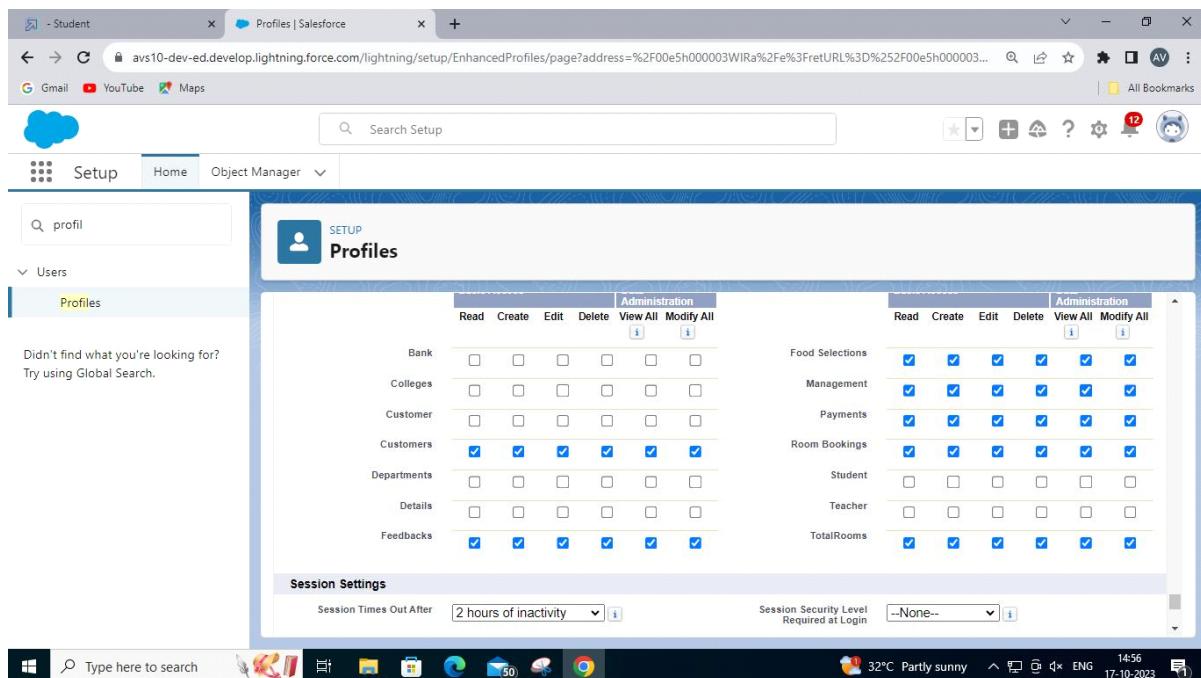




## 3.2 profile Setup &Roles

Salesforce roles are record-level access controls that define what data a user can see in Salesforce.

### Creating a Role



Screenshot of the Salesforce Setup interface showing the 'Clone Profile' screen.

The URL in the browser is [av10-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fui%2Fprofile%2FProfileClone%2fe%3fid%3d...](https://av10-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%3D...)

The page title is "Profiles | Salesforce".

The left sidebar shows "Users" and "Profiles".

The main content area is titled "Clone Profile" and says "Enter the name of the new profile." It includes a note: "You must select an existing profile to clone from." A required field indicator (red exclamation mark) is shown next to "Profile Name".

The "Profile Name" field contains "Custom User".

Buttons at the bottom are "Save" and "Cancel".

The system status bar at the bottom shows: Type here to search, 32°C Partly sunny, ENG, 14:54, 17-10-2023.

Screenshot of the Salesforce Setup interface showing the "Role Edit" screen for "Billing Operator".

The URL in the browser is [nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2f00E5h000002X5mg%2fe%3fsetupid%3dRoles%26retURL%3d%252f00E5h000002X5mg%253...](https://nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00E5h000002X5mg%2Fe%3Fsetupid%3DRoles%26retURL%3D%252F00E5h000002X5mg%253...)

The page title is "Roles | Salesforce".

The left sidebar shows "Users" and "Roles".

The main content area is titled "Role Edit" for "Billing Operator". It shows fields for "Label" (Billing Operator), "Role Name" (Billing\_Operator), and "This role reports to" (Store Head). There is also a field for "Role Name as displayed on reports".

Buttons at the bottom are "Save", "Save & New", and "Cancel".

The system status bar at the bottom shows: Verify your identity in Sales..., Roles | Salesforce - Google..., Screenshot, 15:53.

- Student - Student - WhatsApp Roles | Salesforce

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Gmail YouTube Maps Global NetAcad... Edube Interactive...

Cloud Search Setup Home Object Manager

rol

Users Roles Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases Didn't find what you're looking for? Try using Global Search.

## Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Help for this Page Show in tree view

Nan mudhalvan

- + Add Role
- + CEO
- + CFO
- + COO
- + Store Head
- + Billing Operator
- + SVP, Customer Service & Support
- + Customer Support, International
- + Customer Support, North America
- + Installation & Repair Services
- + SVP, Human Resources

Add Role

Verify your identity in Sales... Roles | Salesforce - Google... Salesforce Screenshot 15:53

This screenshot shows the 'Roles' setup page in Salesforce. On the left, a sidebar lists categories like 'Sales', 'Service', and 'Case Teams'. The main area displays a hierarchical tree of roles under 'Nan mudhalvan'. Roles include CEO, CFO, COO, Store Head, Billing Operator, SVP, Customer Service & Support, Customer Support, International, Customer Support, North America, Installation & Repair Services, and SVP, Human Resources. Each role has edit, delete, and assign options. A search bar at the top and a help link are also present.

- Student - Profiles | Salesforce

av10-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%F00e5h000003WIR%2Fe%3FretURL%3D%25F00e5h000003...

Gmail YouTube Maps

Cloud Search Setup Home Object Manager

profil

Users Profiles Didn't find what you're looking for? Try using Global Search.

## Profiles

	Read	Create	Edit	Delete	View All	Modify All	Administration		Read	Create	Edit	Delete	View All	Modify All	Administration
Bank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Colleges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Feedbacks	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>									

Session Settings

Session Times Out After: 2 hours of inactivity

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

Type here to search

32°C Partly sunny 14:59 17-10-2023

This screenshot shows the 'Profiles' setup page in Salesforce. It displays two sets of permission matrices for various objects like Bank, Colleges, Customer, etc. The first set of matrices is labeled 'Administration' and the second is labeled 'Administration'. Below the matrices are 'Session Settings' for session timeout and security level requirements. The Windows taskbar at the bottom shows other open applications like Edge, File Explorer, and Google Chrome.

### 3.3 Role

The screenshot shows the Salesforce Setup interface for managing Roles. The left sidebar navigation includes 'Setup', 'Home', and 'Object Manager'. Under 'Users', 'Roles' is selected. The main content area displays the 'Your Organization's Role Hierarchy' tree. The hierarchy starts with 'AVS' at the top, which branches into 'Sales' (containing 'Contact Roles on Contracts' and 'Contact Roles on Opportunities') and 'Service' (containing 'Case Teams' with 'Case Team Roles' and 'Contact Roles on Cases'). Other roles listed include 'CEO', 'CFO', 'COO', 'SVP Customer Service & Support', 'Customer Support, International', 'Customer Support, North America', 'Installation & Repair Services', and 'SVP Human Resources'. Each role entry has 'Edit', 'Del', and 'Assign' buttons.

### 3.3 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.

#### Creating A User

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar navigation includes 'Setup', 'Home', and 'Object Manager'. Under 'Users', 'Users' is selected. The main content area shows a 'User Edit' screen for 'Aravind Venkatachalam'. The 'General Information' section contains the following fields:

Field	Value
First Name	Aravind
Last Name	Venkatachalam
Alias	msale
Email	managersales.bbb@gmail.com
Username	aravind761@gmail.com
Nickname	User169700260995663738
Title	
Company	
Department	
Role	CEO
User License	Salesforce
Profile	Custom User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>

Naan Mudhalvan | Recently Viewed | TotalRooms | Users | Salesforce | +

Gmail YouTube Maps All Bookmarks

Cloud Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

**Users**

Feature Settings

Data.com

Prospector Users

New User

Help for this Page

User Edit

General Information

First Name: Boopathi

Last Name: R

Alias: br

Email: boopathi.abc@gmail.com

Username: boopathi.abc@gmail.com

Nickname: User169761616540739631

Title:

Company:

Department:

Role: Marketing

User License: Salesforce Integration

Profile: Salesforce API Only System Integrations

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Type here to search

Watchlist -0.57% 13:34 18-10-2023

Naan Mudhalvan | Recently Viewed | TotalRooms | Users | Salesforce | +

Gmail YouTube Maps All Bookmarks

Cloud Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

**Users**

Feature Settings

Data.com

Prospector Users

New User

Help for this Page

User Edit

General Information

First Name: Ajmal

Last Name: S

Alias: as

Email: ajmal.avs@gmail.com

Username: ajmal.avs@gmail.com

Nickname: User169761633965171206

Title:

Company:

Department:

Role: Receptionist

User License: Force.com - Free

Profile: Force.com - Free User

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

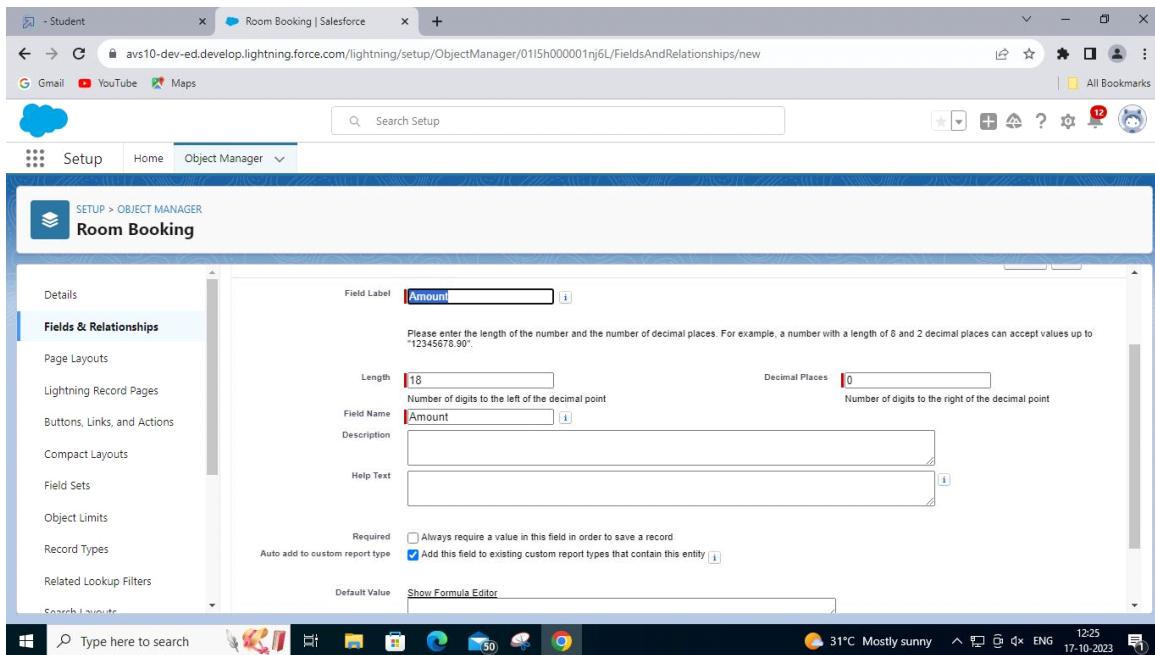
Type here to search

NIFTYBANK -1.03% 13:37 18-10-2023

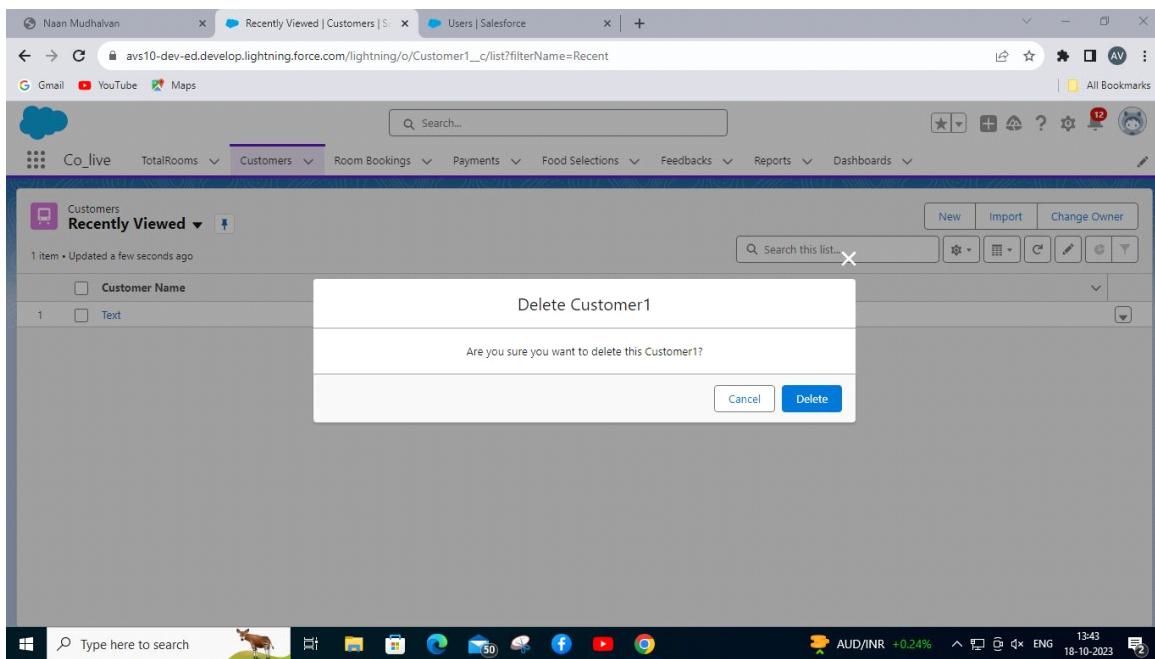
## 3.4 User Adoption & Approval

It is the interaction with database and their records.

### Create Our Customer Record



### View Record (Our Customer)



Naan Mudhalvan    Recently Viewed | Customers | S    Users | Salesforce

av10-dev-ed.develop.lightning.force.com/lightning/o/Customer1\_\_c/list?filterName=Recent

Gmail YouTube Maps

Search... All Bookmarks

Co\_live TotalRooms Customers Room Bookings Payments Food Selections Feedbacks Reports Dashboards

Customer Recently Viewed ▾

Customer1 "Text" was deleted. Undo

New Import Change Owner

Search this list... Filter

Customer Name

You haven't viewed any Customers recently.  
Try switching list views.

Type here to search

AUD/INR +0.24% 13:43 18-10-2023

- Student - Student (2) WhatsApp Recently Viewed | our\_customers

Gmail YouTube Maps Global NetAcad ... Edube Interactive...

Cosmetic store ma... our\_customers retailers Inventories Fragrance products Skincare products Reports Dashboards

our\_customers Recently Viewed ▾

our\_customer "aja" was deleted. Undo

New Import Change Owner

Search...

2 items • Updated a few seconds ago

	our_customer Name
1	mythili
2	Anjali

Verify your identity in Sales... Screenshot Screenshot

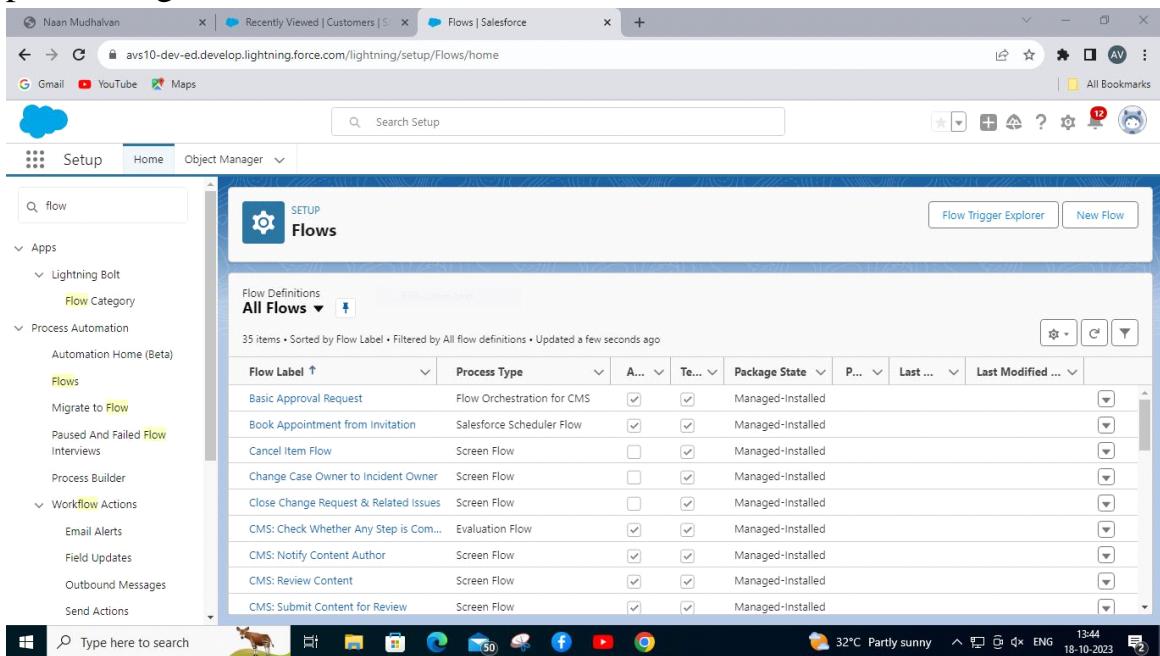
16:00

# CHAPTER-4

## AUTOMATION

### 4.1 Flow

The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that provide a declarative, drag-and-drop design environment to build our business process logic.



Screenshot of the Flow Builder interface showing the creation of a new flow.

The top navigation bar shows the URL [av10-dev-ed.lightning.force.com/builder\\_platform\\_interaction/flowBuilder.app](https://av10-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app).

The main area displays the "New Flow" screen under the "Core" category. The "Record-Triggered Flow" option is selected, highlighted with a blue border. The description states: "Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background." Below this, other flow types are listed: "Screen Flow", "Schedule-Triggered Flow", "Platform Event—Triggered Flow", "Autolaunched Flow (No Trigger)", and "Record-Triggered Orchestration". A "Create" button is located at the bottom right of the list.

The bottom section shows the flow editor with a single step: "Start Record-Triggered Flow" (Object: Room Booking, Trigger: A record is created or updated). The flow ends at an "End" node.

The status bar at the bottom indicates the date and time as 18-10-2023, 13:47.

S Naan Mudhalvan | Recently Viewed | Customers | Flows | Salesforce | Flow Builder | +

av10-dev-ed.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

Gmail YouTube Maps All Bookmarks

Flow Builder

Auto-Layout Run Debug View Tests Activate Save As Save

Start Record-Triggered Flow

Object: Room Booking Edit

Trigger: A record is created or updated

Optimize for: Actions and Related Records

Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Room Booking

End

A record is updated  
 A record is created or updated  
 A record is deleted

**Set Entry Conditions**

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.

Condition Requirements: None

\* Optimize the Flow for:

Fast Field Updates: Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

Actions and Related Records: Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Type here to search

Flows | Salesforce Flow Builder

NIFTY -0.53% 13:48 18-10-2023

av10-dev-ed.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

Gmail YouTube Maps All Bookmarks

Flow Builder

Auto-Layout Run Debug View Tests Activate Save As Save

Record-Triggered Flow Start

Run Immediately

Add Element

Logic

- Assignment
- Decision
- Loop
- Transform (Beta)
- Collection Sort
- Collection Filter

A record is updated  
 A record is created or updated  
 A record is deleted

**Set Entry Conditions**

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.

Condition Requirements: None

\* Optimize the Flow for:

Fast Field Updates: Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

Actions and Related Records: Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Type here to search

NIFTY -0.55% 13:55 18-10-2023

Flows | Salesforce Flow Builder

av10-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

Gmail YouTube Maps All Bookmarks

### New Decision

Default Outcome Condition Requirements to Execute Outcome  
All Conditions Are Met (AND)

Resource	Operator	Value
\$Record > Room Sharing	Equals	Single sharing

AND

Resource	Operator	Value
\$Record > AC-3000	Equals	False

+ Add Condition

When to Execute Outcome  If the condition requirements are met  Only if the record that triggered the flow to run is updated to meet the condition requirements

Save Cancel Done

Flows | Salesforce Flow Builder

av10-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

Gmail YouTube Maps All Bookmarks

### New Decision

Default Outcome Condition Requirements to Execute Outcome  
All Conditions Are Met (AND)

Resource	Operator	Value
\$Record > Room Sharing	Equals	Double sharing

AND

Resource	Operator	Value
\$Record > AC-3000	Equals	False

+ Add Condition

When to Execute Outcome  If the condition requirements are met  Only if the record that triggered the flow to run is updated to meet the condition requirements

Save Cancel Done

Flows | Salesforce Flow Builder

av\$10-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

Gmail YouTube Maps All Bookmarks

### New Decision

OUTCOME ORDER [+]

OUTCOME DETAILS

\*Label: Single Ac   \*Outcome API Name: Single\_Ac

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: \$Record > Room Sharing   Operator: Equals   Value: Single sharing

Resource: \$Record > AC-3000   Operator: Equals   Value: True

+ Add Condition

Default Outcome

Cancel Done

- +

Type here to search NIFTYBANK -1.05% 14:15 18-10-2023

Flows | Salesforce Flow Builder

av\$10-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

Gmail YouTube Maps All Bookmarks

### New Decision

OUTCOME ORDER [+]

OUTCOME DETAILS

\*Label: Triple Ac   \*Outcome API Name: Triple\_Ac

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: \$Record > Room Sharing   Operator: Equals   Value: Triple sharing

Resource: \$Record > AC-3000   Operator: Equals   Value: True

+ Add Condition

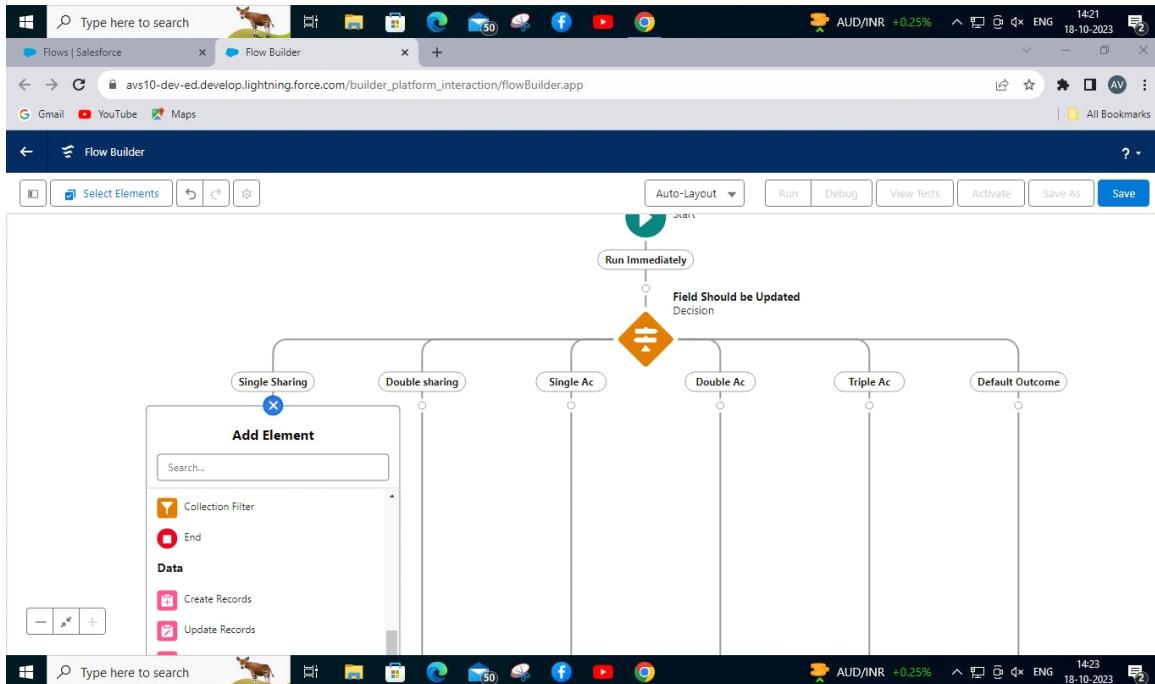
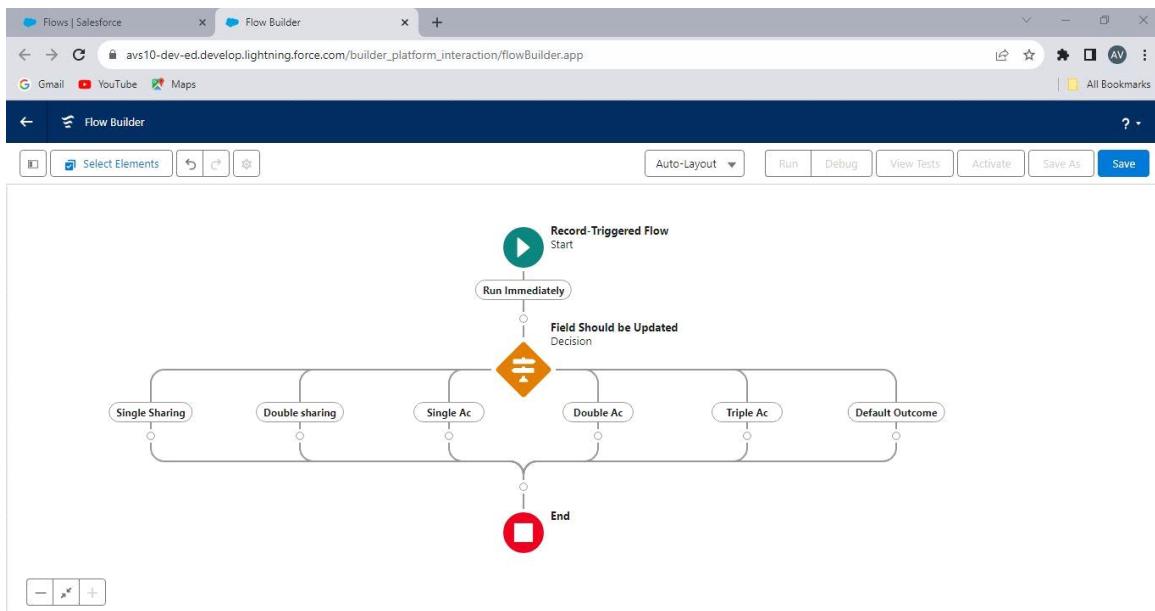
Default Outcome

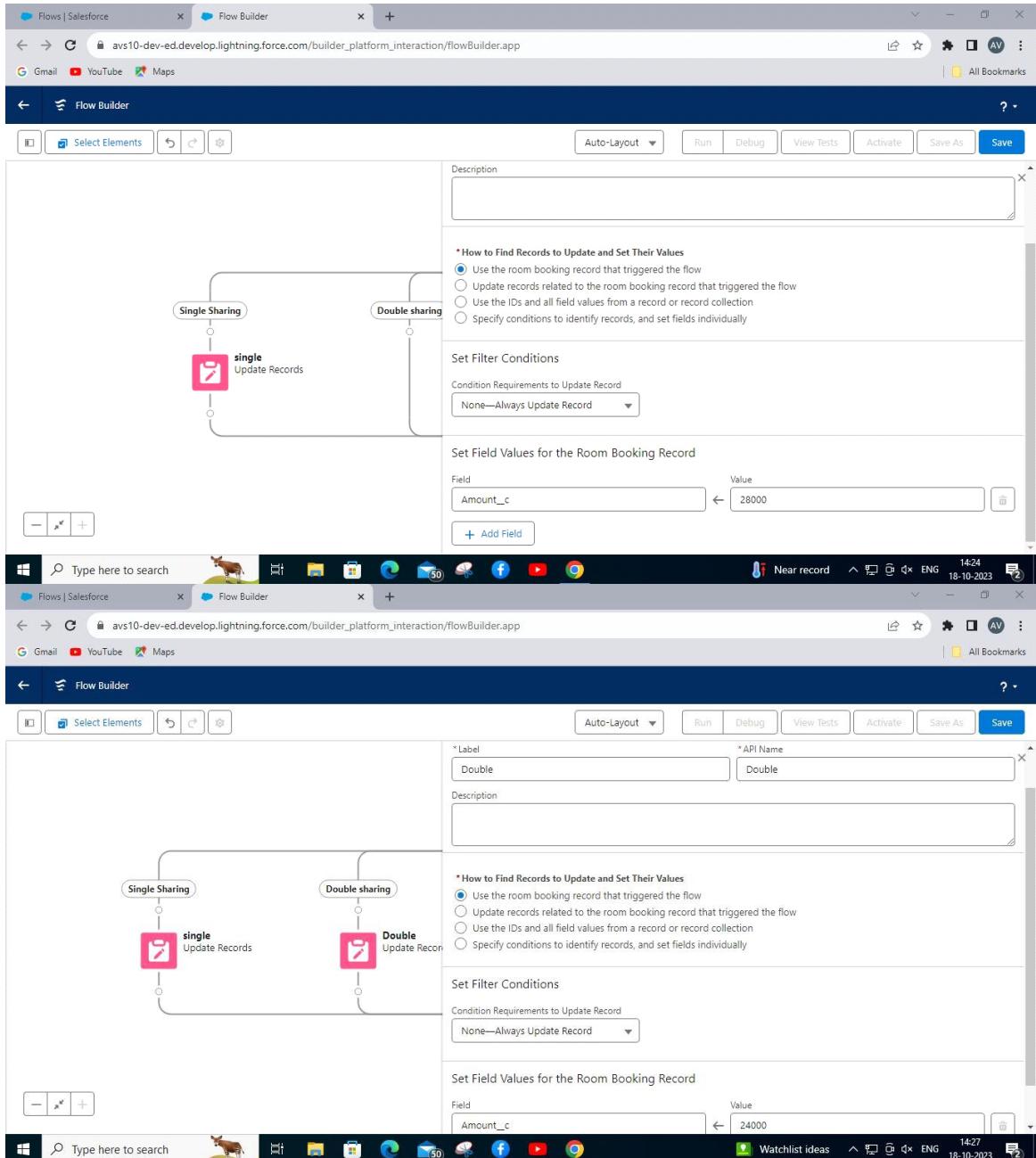
When to Execute Outcome [i]

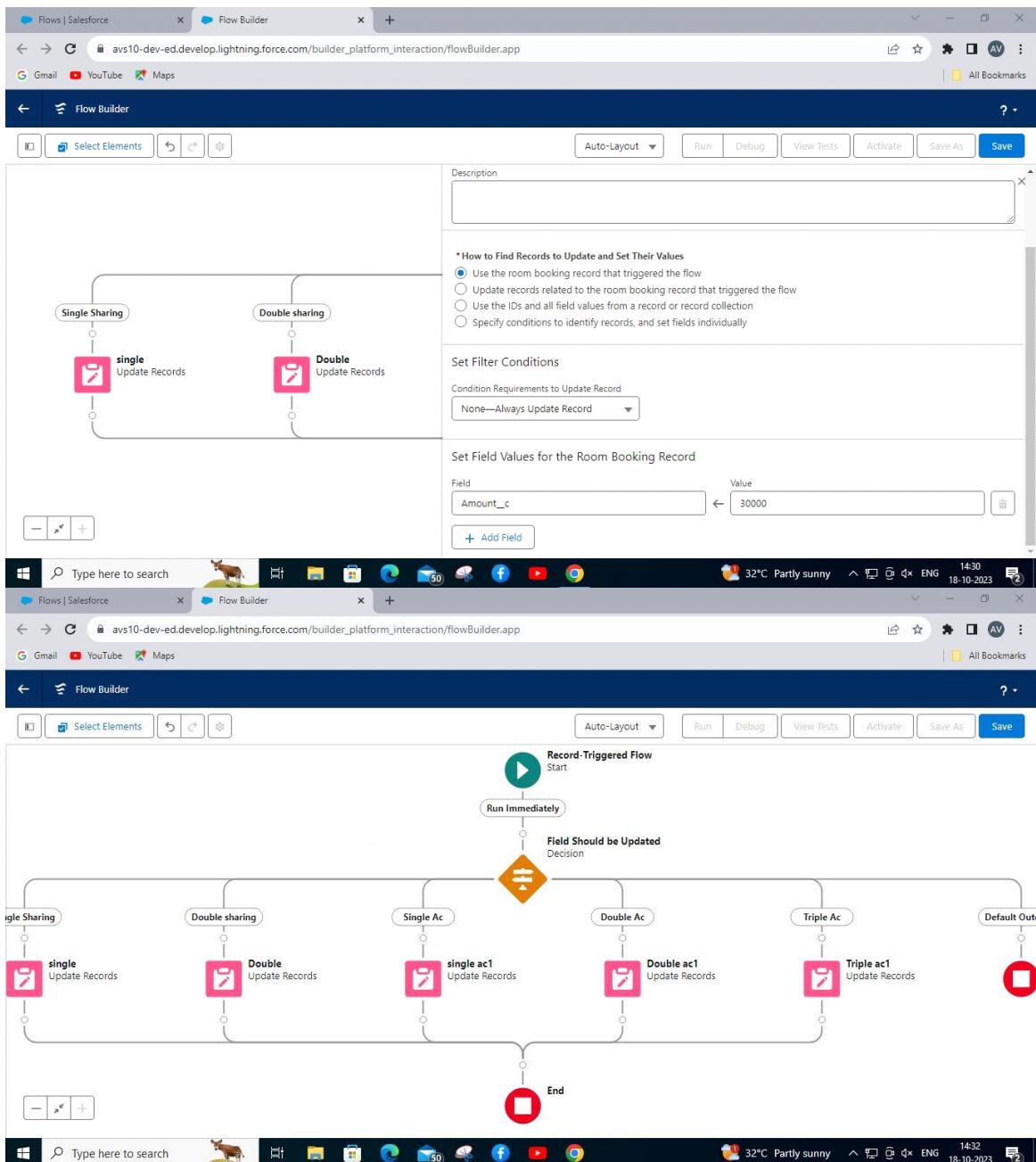
Cancel Done

- +

Type here to search 32°C Partly sunny 14:20 18-10-2023







Flows | Salesforce

Flow Builder

Record-Triggered Flow

Save the flow

\* Flow Label: Update Amount Field

\* Flow API Name: Update\_Amount\_Field

Description:

Show Advanced

Cancel Save

Single Sharing

single Update Records

Default Outcome

Triple ac1 Update Records

End

New Room Booking | Salesforce

Update Amount Field - V1

32°C Partly sunny 14:32 ENG 18-10-2023

New Room Booking

Information

\* Room Sharing: Double sharing

\* Name: Prasad

AC-3000

Advance Payment for 1 Month

₹30,000

Cancel Save & New Save

Type here to search

Room Bookings Recently Viewed

Room No

Co\_live TotalRooms

32°C Partly sunny 14:36 ENG 18-10-2023

RN-001 | Room Booking | Salesf x Update Amount Field - V1 x +

av10-dev-ed.develop.lightning.force.com/lightning/r/Room\_\_c/a0E5h00000cbSymEAA/view

G Gmail YouTube Maps

Co\_live TotalRooms Customers Room Bookings Payments Food Selections Feedbacks Reports Dashboards

Search...

Room Booking RN-001

New Contact Edit New Opportunity

Related Details

Room No  
RN-001

Room Sharing  
Double sharing

Name  
Prasad

AC-3000

Advance Payment for 1 Month

Amount

₹30,000

Total No Of Rooms  
2

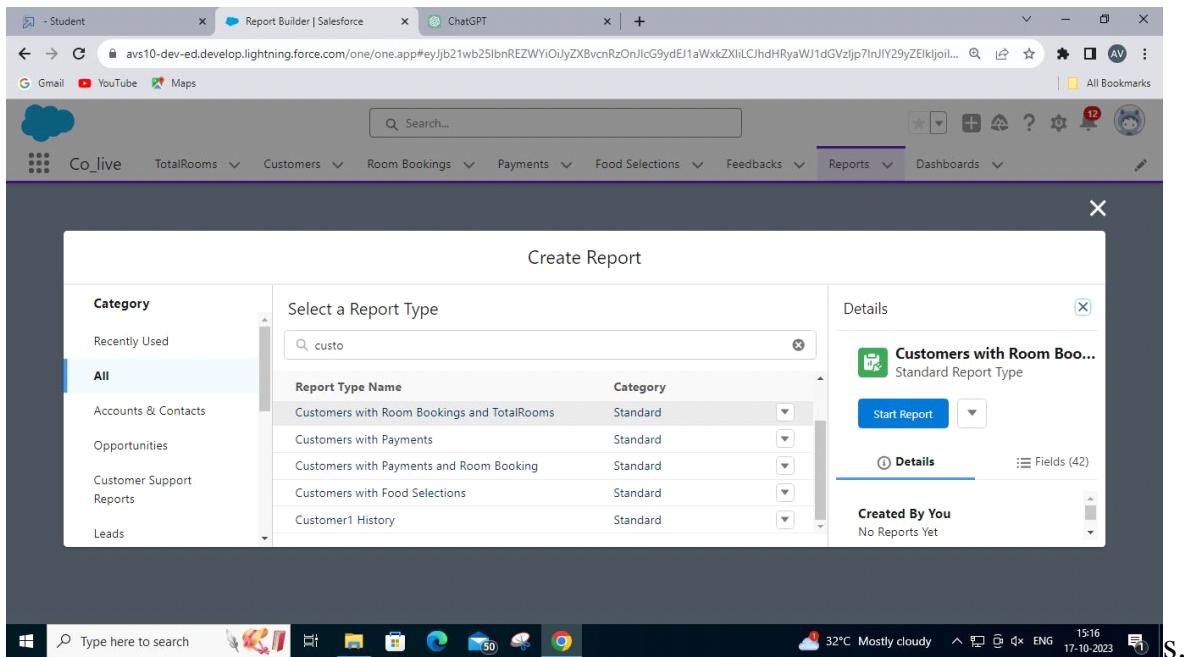
Type here to search 32°C Partly sunny 14:37 18-10-2023

# CHAPTER-5

## REPORTS & DASHBOARD

### 5.1 Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits. The report builder provides a drag-and-drop interface to easily build and customize your report



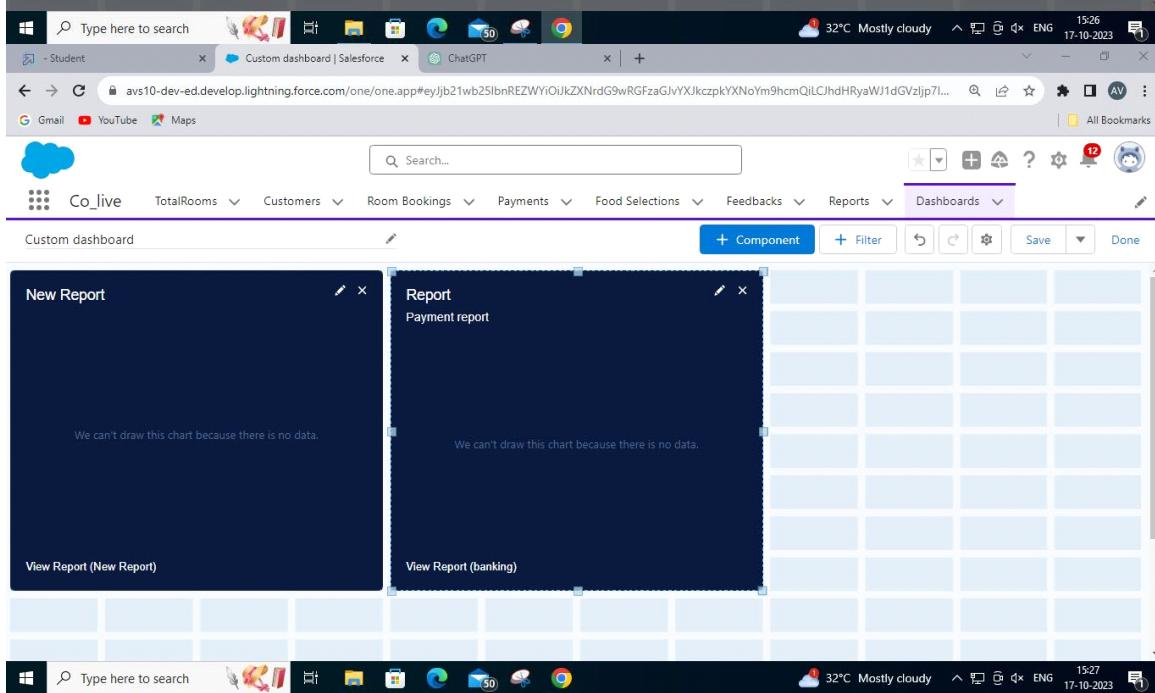
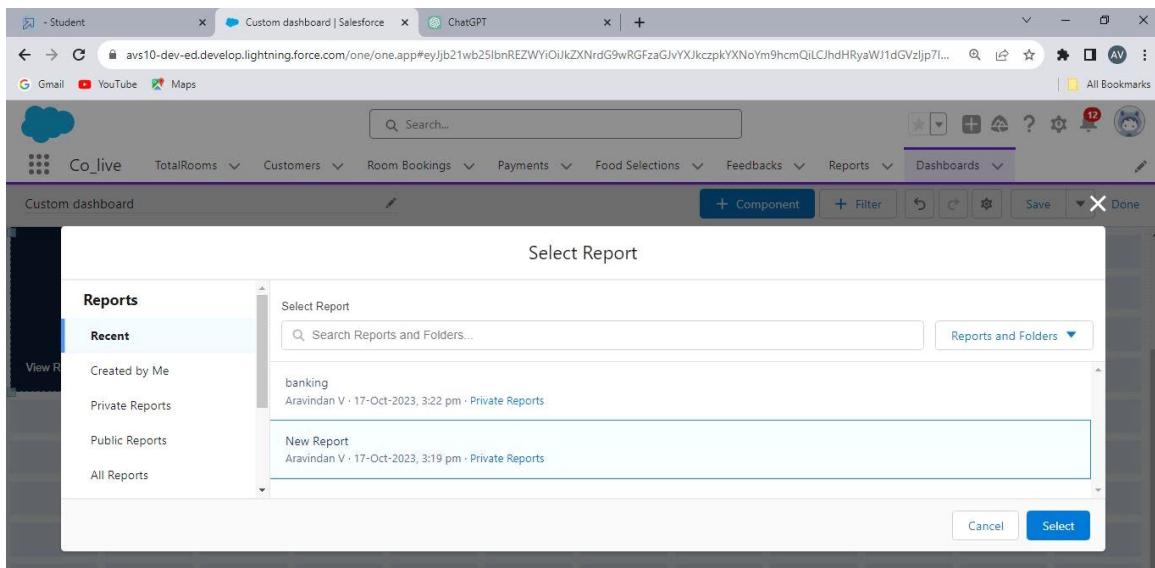
The screenshot shows the Salesforce Report Builder interface. At the top, there are tabs for 'Student', 'Report Builder | Salesforce', and 'ChatGPT'. The main title is 'Customers with Room Bookings and TotalRooms'. The report preview area shows a message: 'No records returned. Try editing report filters:' with two options: 'Show All customers.' and 'Edit other filters in the filter panel.' The left sidebar has sections for 'Fields' (Groups, Columns), 'Outline', and 'Filters'. The filters panel includes dropdowns for 'Customer1: Customer Name', 'Room Booking: Room No', and 'Total No Of Rooms: Total No Of Rooms'. A status bar at the bottom indicates 'Update Preview Automatically' is turned off. The taskbar at the bottom shows various icons and the date/time '17-10-2023 15:19'.

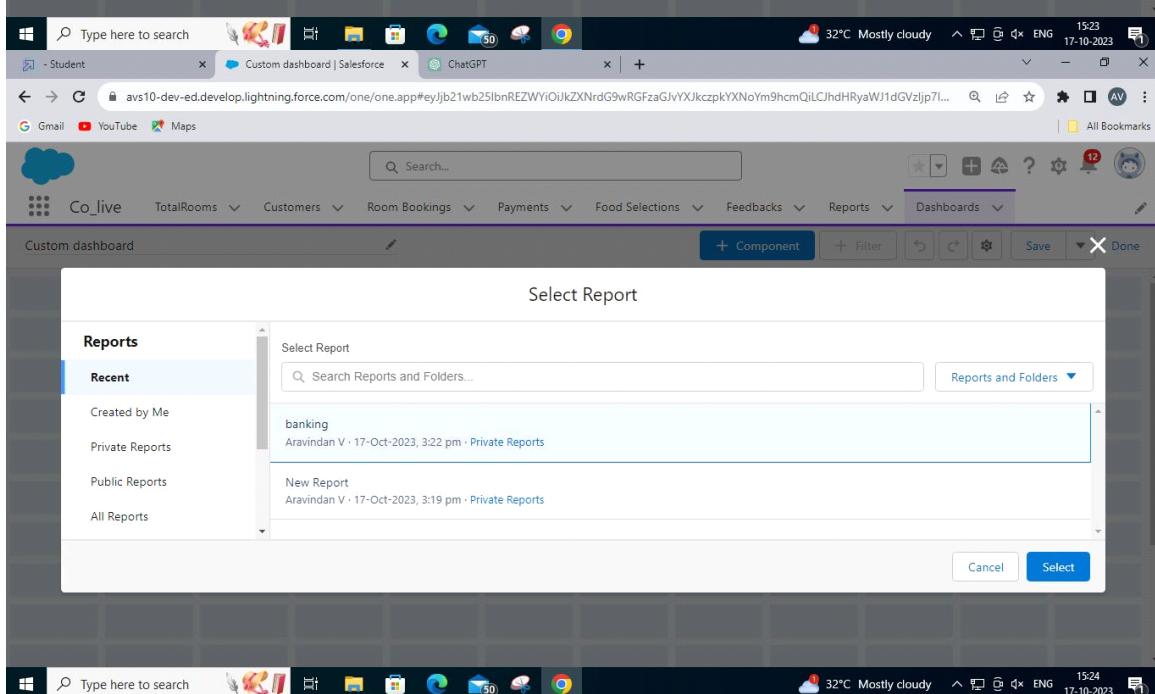
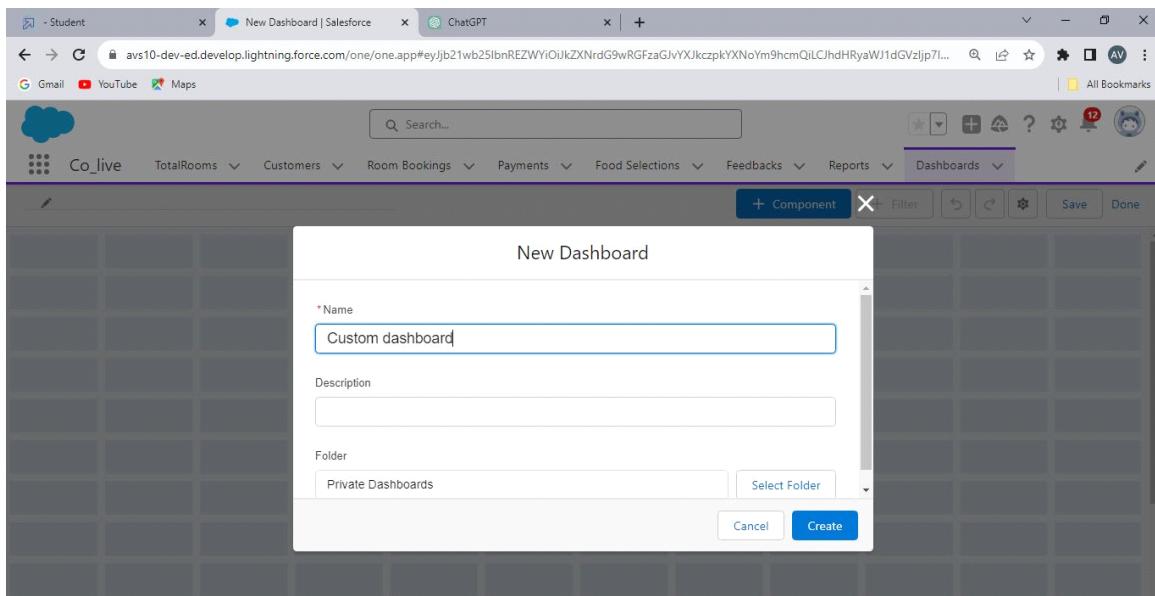
## 5.2 Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.

### View Dashboard

The screenshot shows the Salesforce Custom Dashboard interface. The title is 'Custom dashboard'. There is one report component titled 'Payment report' which displays the message 'We can't draw this chart because there is no data.' Below it is a link 'View Report (banking)'. The dashboard has a grid layout with several empty slots for other components. The top navigation bar includes 'Student', 'Custom dashboard | Salesforce', and 'ChatGPT'. The taskbar at the bottom shows various icons and the date/time '17-10-2023 15:26'.





## **CHAPTER-6**

### **CONCLUSION**

In conclusion, the Salesforce-based Customer Store Management project aims to address the significant challenges faced by employees in cosmetics stores when it comes to managing customer records, processing orders, and generating discount coupons. The project's primary goal is to create an efficient, automated system that enhances operational efficiency, reduces errors, and ultimately improves customer satisfaction.

Through the design and implementation of custom objects, user profiles, and automation tools, the project offers a unique and tailored solution for cosmetics stores. The use of Salesforce as the platform ensures a secure, scalable, and customizable environment to meet the specific needs of the business.

By streamlining data entry, order processing, and coupon generation, this project not only simplifies the daily tasks of employees but also contributes to the store's growth and success. It enables personalized customer engagement, data-driven decision-making, and efficient management of customer relationships.

The project emphasizes the social impact of enhancing the customer experience, potentially leading to increased customer loyalty and revenue. It also aligns with the digital transformation trend in the retail industry, where businesses are leveraging technology to stay competitive and meet customer expectations.

In summary, the Salesforce Customer Store Management project has the potential to revolutionize how cosmetics stores operate, providing a competitive advantage and customer-centric approach that can lead to long-term success in the industry.

# **CHAPTER-7**

## **PROJECT DEMONSTRATION**

**GitHub:**

[https://github.com/Aravind8281/NaanMudhalvan\\_Salesforce.git](https://github.com/Aravind8281/NaanMudhalvan_Salesforce.git)

**Demo Link:**

<https://drive.google.com/file/d/1-6a717npEgCjdA0ee8I7bQWJHxGLKNy9/view?usp=drivesdk>