A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING

by

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ABSTARCT

The Co-Living Booking CRM Application is designed to streamline the management and booking processes for co-living spaces.This application integrates customer relationship management (CRM) functionalities with booking and property management features, offering a comprehensive solution for co-living operators. Key features include tenant management, booking and availability tracking, automated billing and payment processing, maintainance requests, and food selection.The application aims to enhance operational efficiency, improve tenant satisfaction, and provide real-time insights into property performance and occupancy rates.By leveraging modern web technologies and intuitive design, this CRM application simplifies the complexitie of managing co-living spaces,making it an essential tool for property managers and owners.

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TASK 1:CREATING DEVELOPER ACCOUNT

Creating a developer org in salesforce.

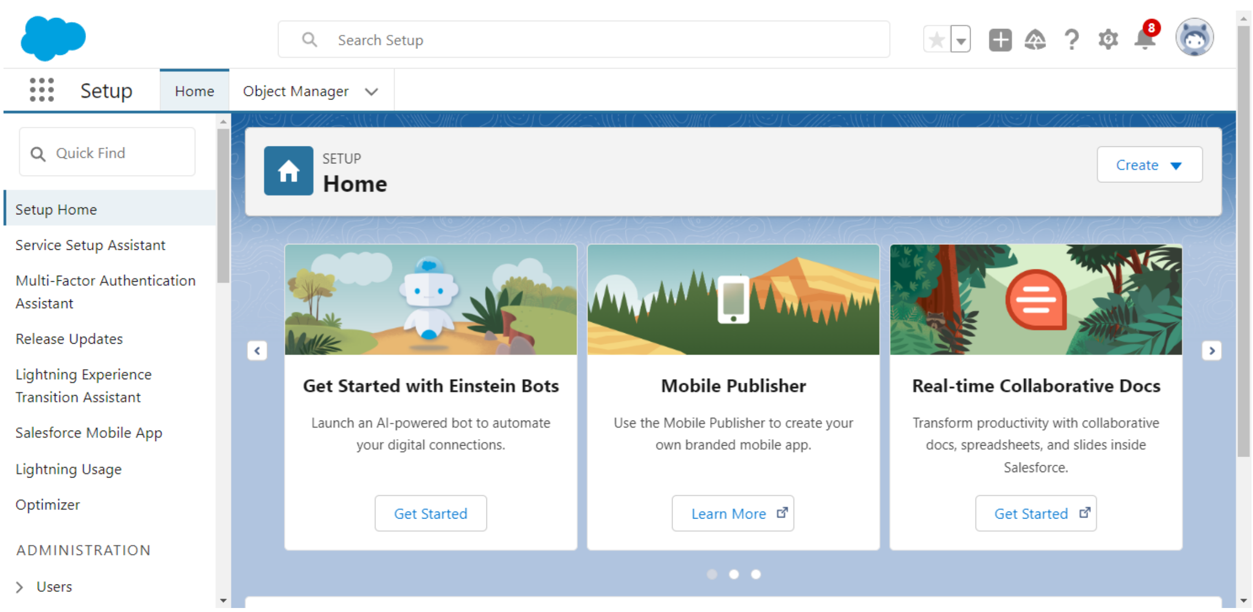
1. Go to https://developer.salesforce.com/signup
2. On the sign up form, enter the following details :
    1. First name & Last name
    2. Email
    3. Role : Developer
    4. Company : College Name
    5. County : India
    6. Postal Code : pin code

Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. when you will redirect to your salesforce setup page.



TASK 2:CREATING OBJECTS

WHAT IS AN OBJECT

An object is like a database table that stores specific types of data. There are two types:

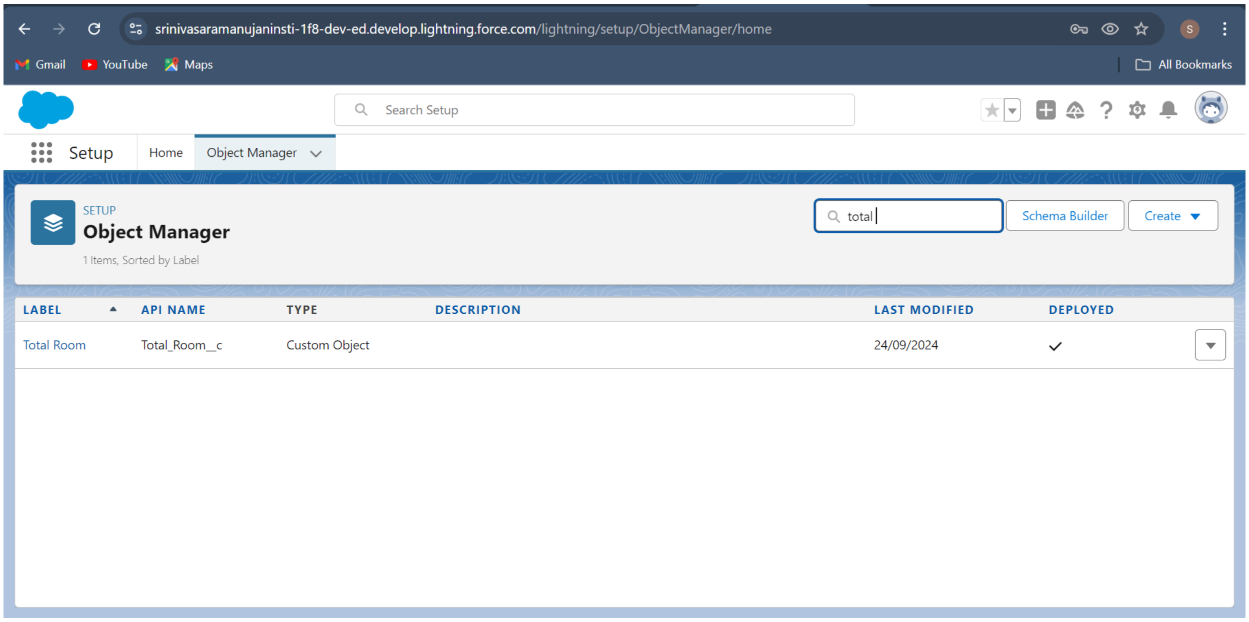
1.Standard Objects: Pre-built objects like Account, Contact, Lead, and Opportunity, used for core CRM functions.

2.Custom Objects: User-created objects for storing data specific to your business needs.

Steps Create a custom object for Total Rooms:

1. From setup click on object manager.
2. Click create, select custom object.
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.
11. Leave everything else as is, and click Save.

NOTE: Follow the same steps for creating custom objects like Customer, Room Booking, Payments, Food Selection and Feedback.



TASK 3:CREATING TABS

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

Types of Tabs:

1.Custom Tabs

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

2.Web Tabs

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.

3.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.

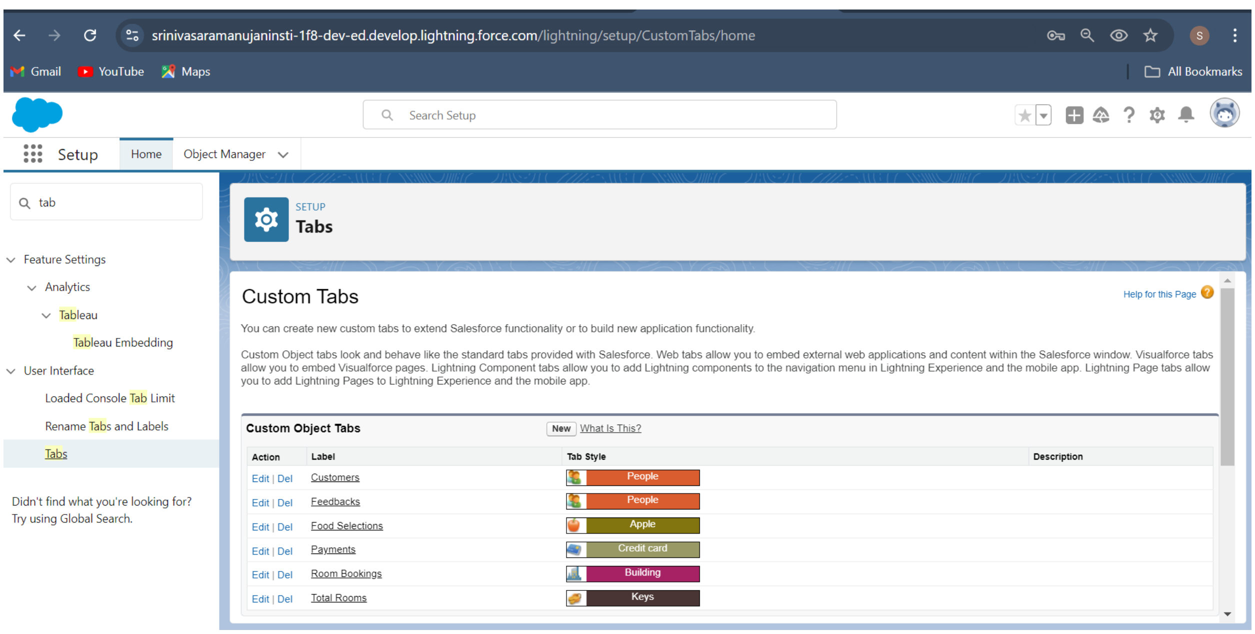
5.Lightning Page Tabs

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

Steps to create a Tab for 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.

Note: Follow the same steps to create remaining objects.



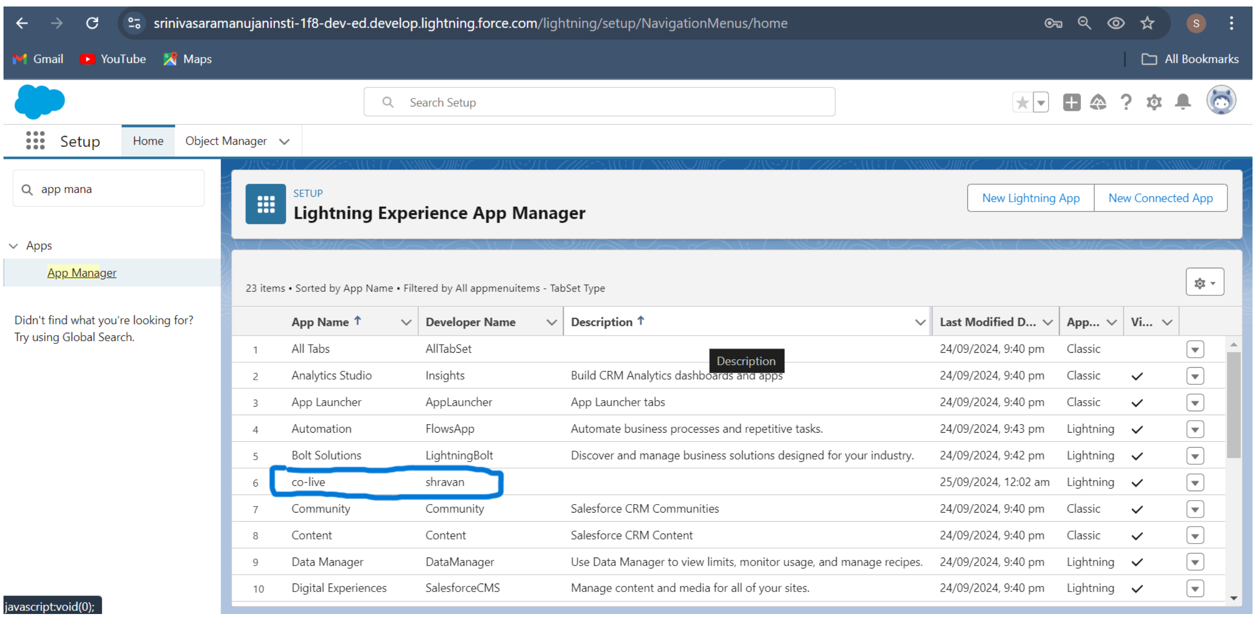
TASK 4:CREATING LIGHTNING APP

The Lightning App

An app is a collection of items that work together to serve a particular function.

Steps 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.
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.



TASK 5:FIELDS & RELATIONSHIPS

Types of Fields:

1.Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task.

2.Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements.

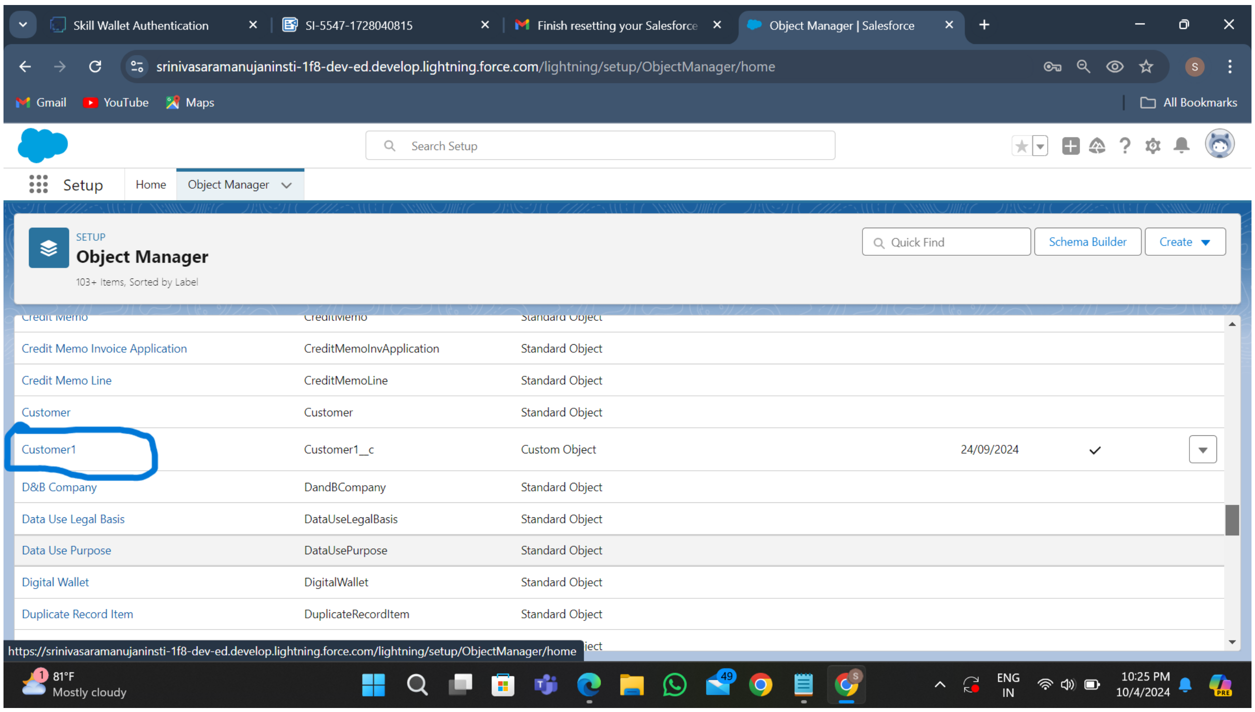
Steps to create Fields for Cutomer1 object:

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 “Phone”
4. Click on next
5. Fill the Above as following:

Field Label: Phone no

Field Name : gets auto generated

Click on Next > Next > Save and new.



TASK 6:VALIDATION RULE

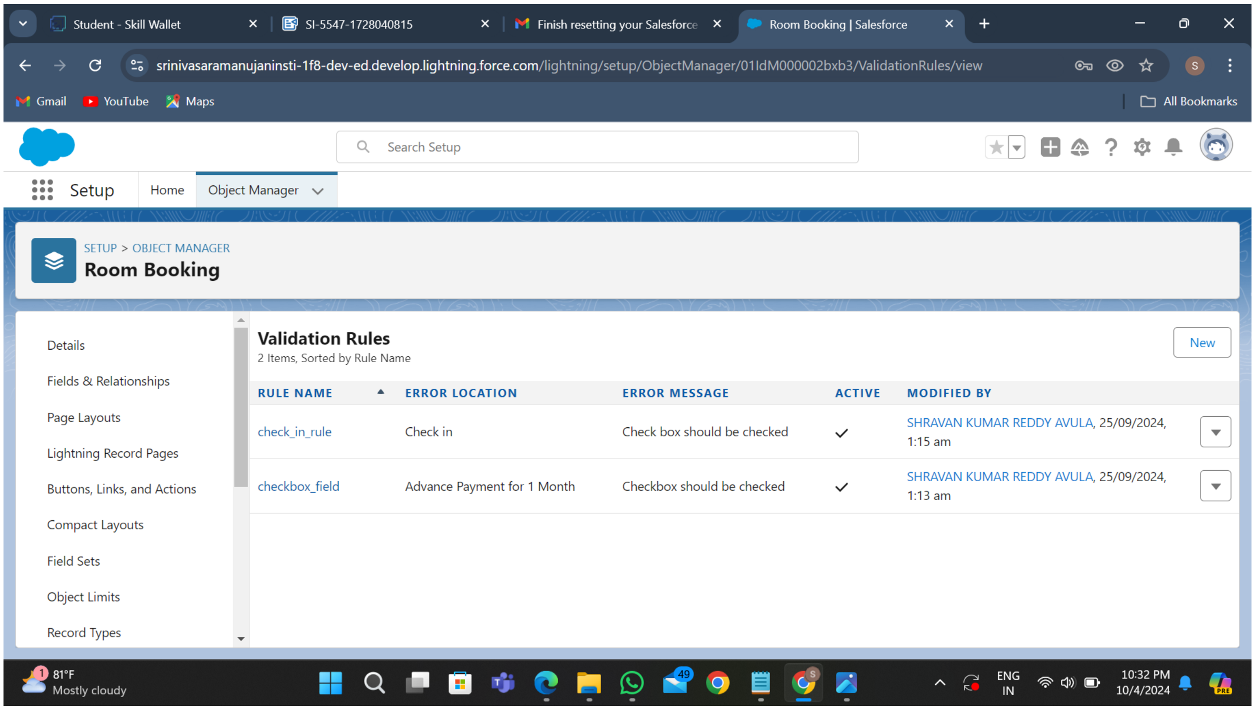
Validation rule

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

create a validation rule to an Room Booking Object

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

2.Now click on “Validation rule” at top > New.
3.Enter Rule name “checkbox field” and make the validation should be Active.
4.Enter the formula in the formula Box “Advance_payment_for_1month__c = false” and check for syntax error.
5.Enter the error message “Checkbox should be checked”
6.Select error location as field(Advance payment for 1month)



TASK 7:PROFILES

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

2. Custom Profiles

To create a new profile:

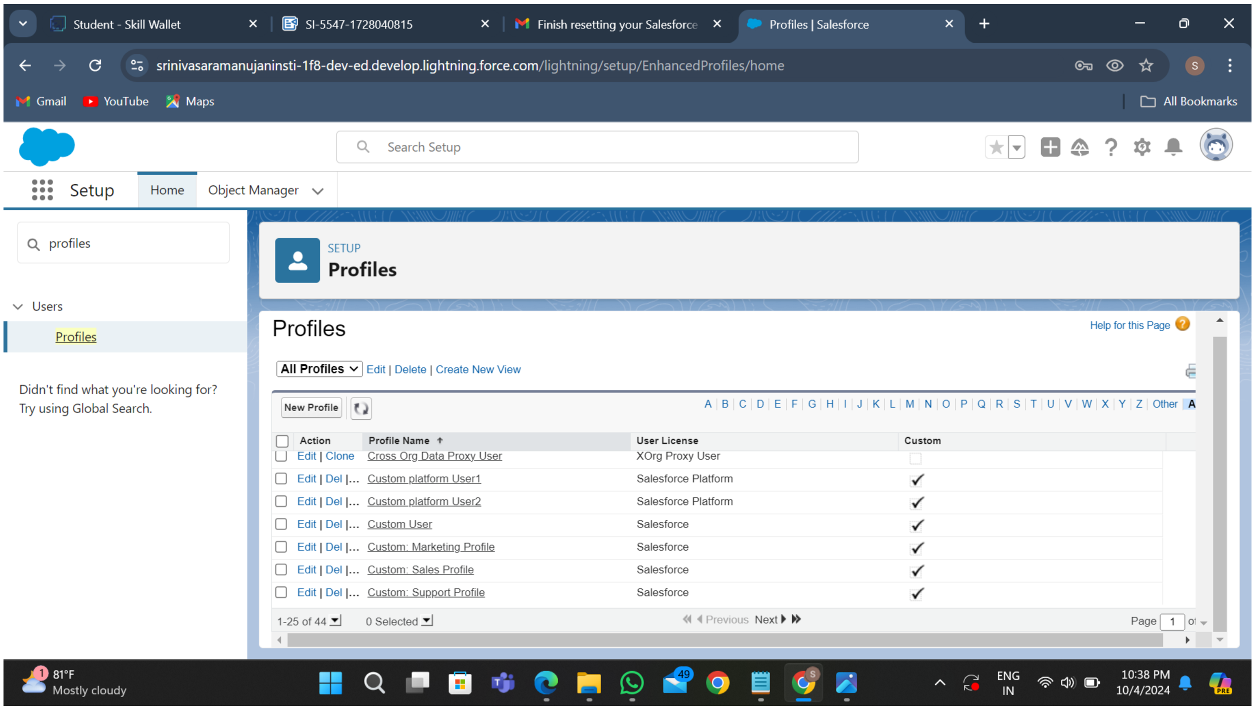
1.Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard User)

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.



TASK 8:ROLES

Roles

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

Marketing Role

1.Go to quick find > Search for Roles > click on set up roles.

2.Click on Expand All and click on add role under CEO role.

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

4.Then click on Save.

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

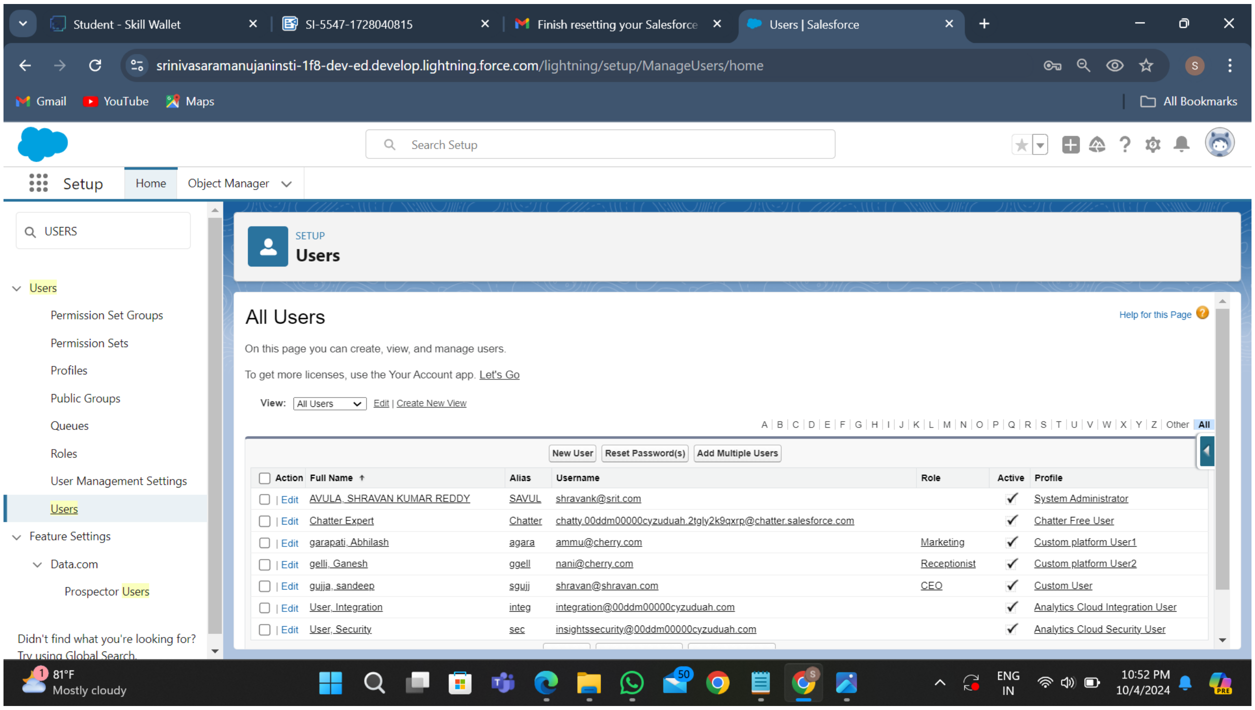
TASK 9:USERS

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

Create User
1.Go to setup > type users in quick find box > select users > click New user.
2.Fill in the fields

- First Name : sandeep
- Last Name : gujja
- Alias : Give a Alias Name
- Email id : Give your Personal Email id
- Username : Username should be in this form: text@text.com
- Nick Name : Give a Nickname
- Role : CEO
- User licence : Salesforce
- Profiles : Custom user

3.save.



TASK 10:USER ADOPTION

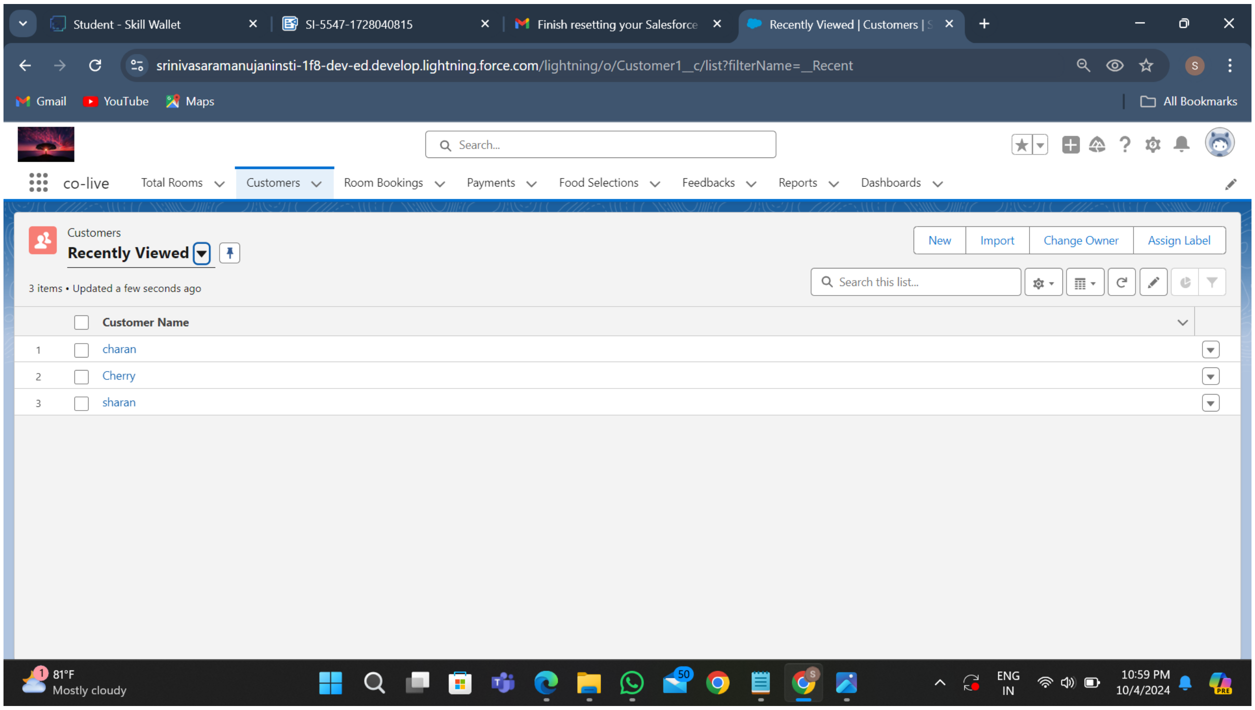
Create a Record (Customers)

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



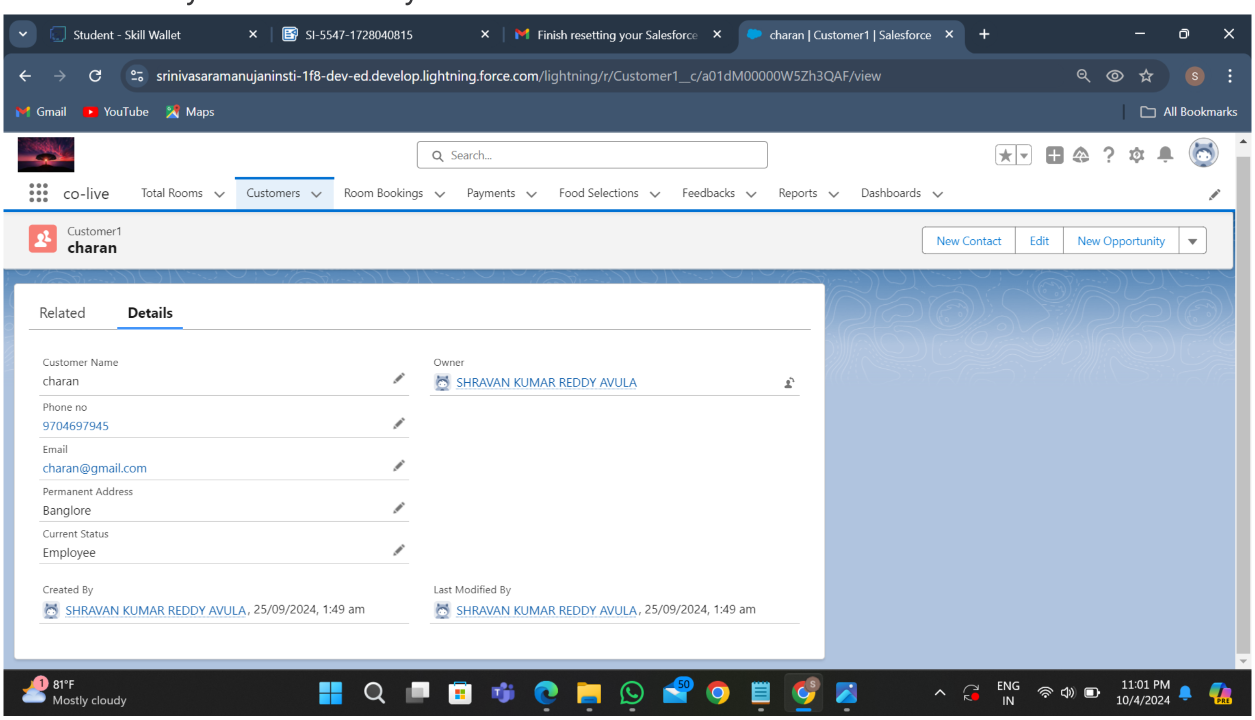
View a Record (Customers)

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)

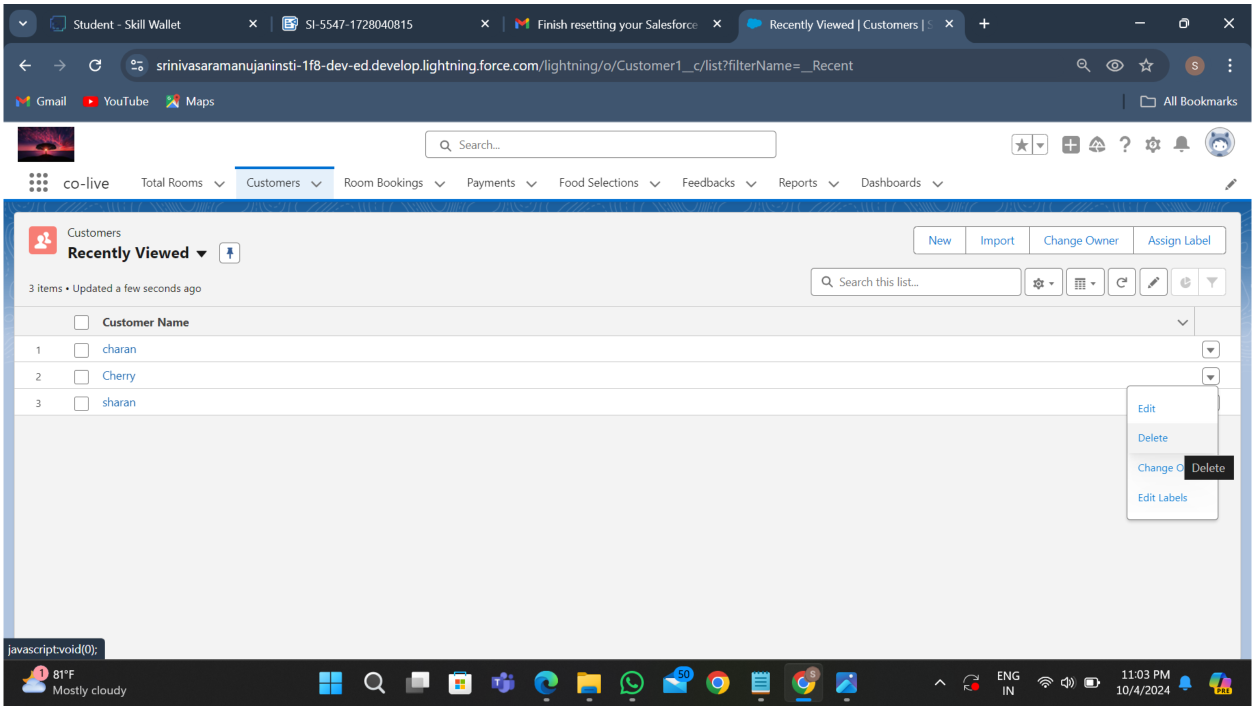
1.Click on App Launcher on the left side of the screen.

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.



TASK 11:REPORTS

Reports

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

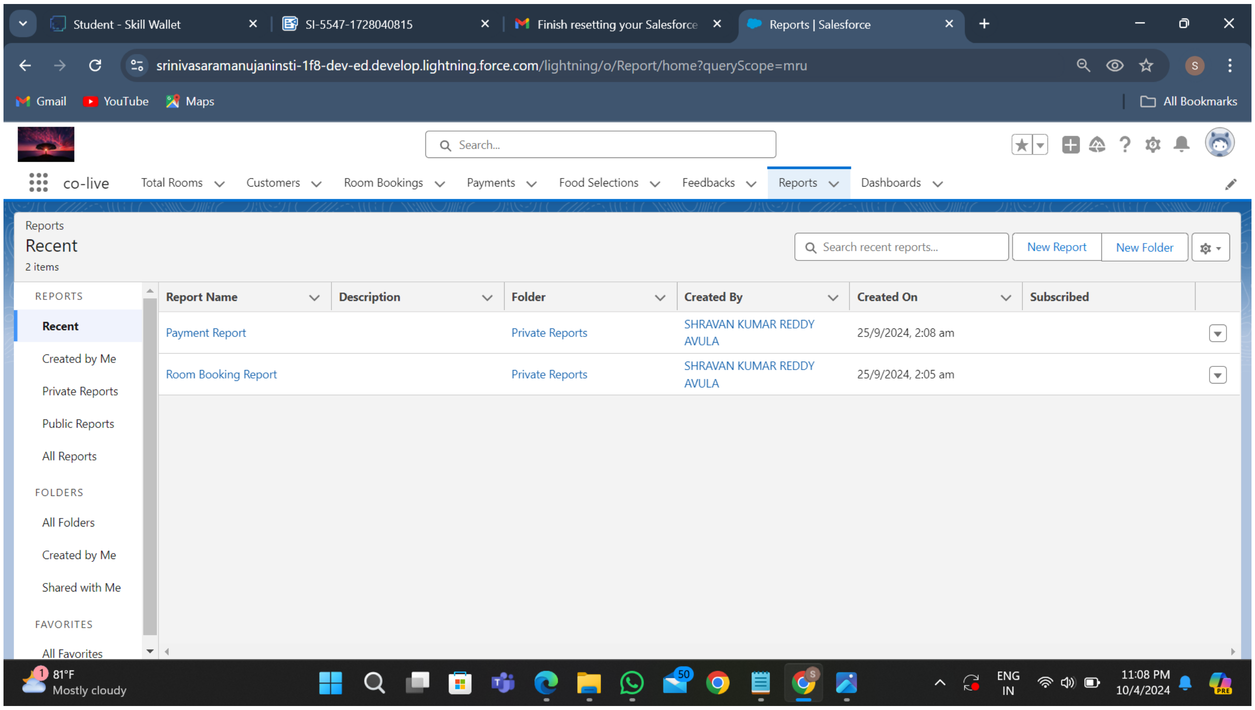
2.Click New Report.

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.



TASK 12:DASHBOARDS

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

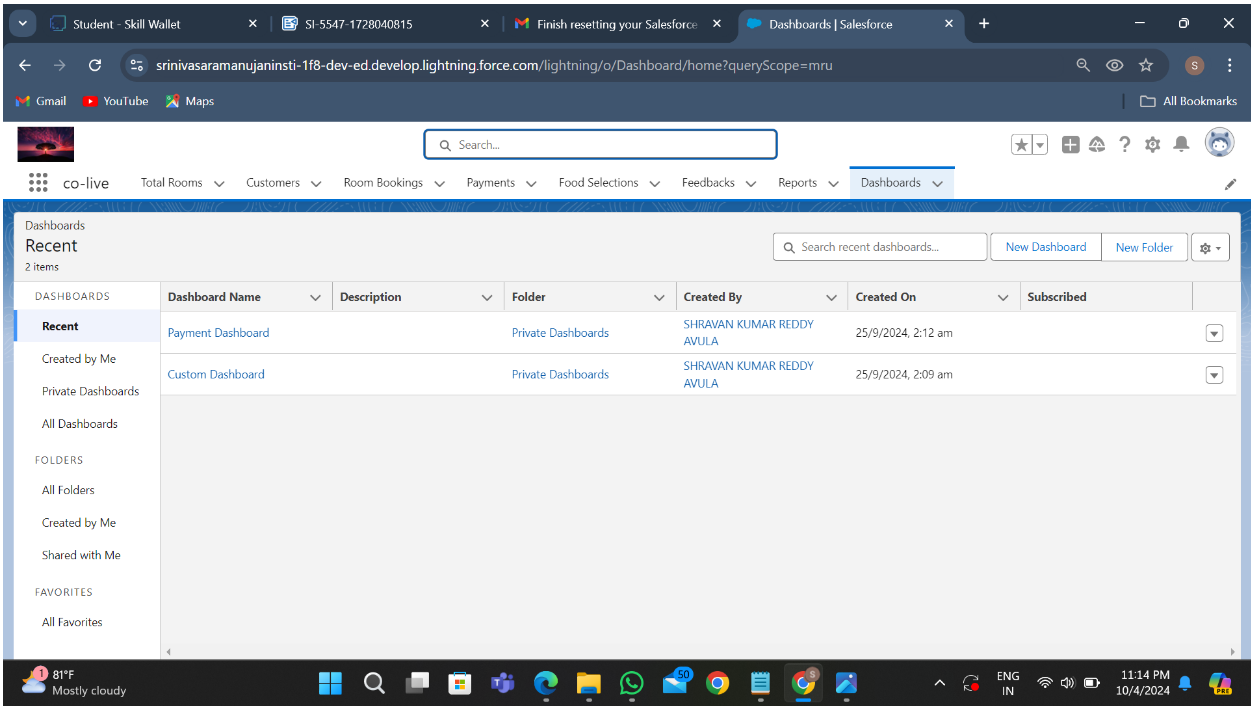
1.Go to the app > click on the Dashboard tabs and click on new Dashboard

2.Give a Name and click on Create.

3.Select add component.

4.Select a Report Customer with Room Booking and click on select.

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



TASK 13:FLOWS

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.

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.

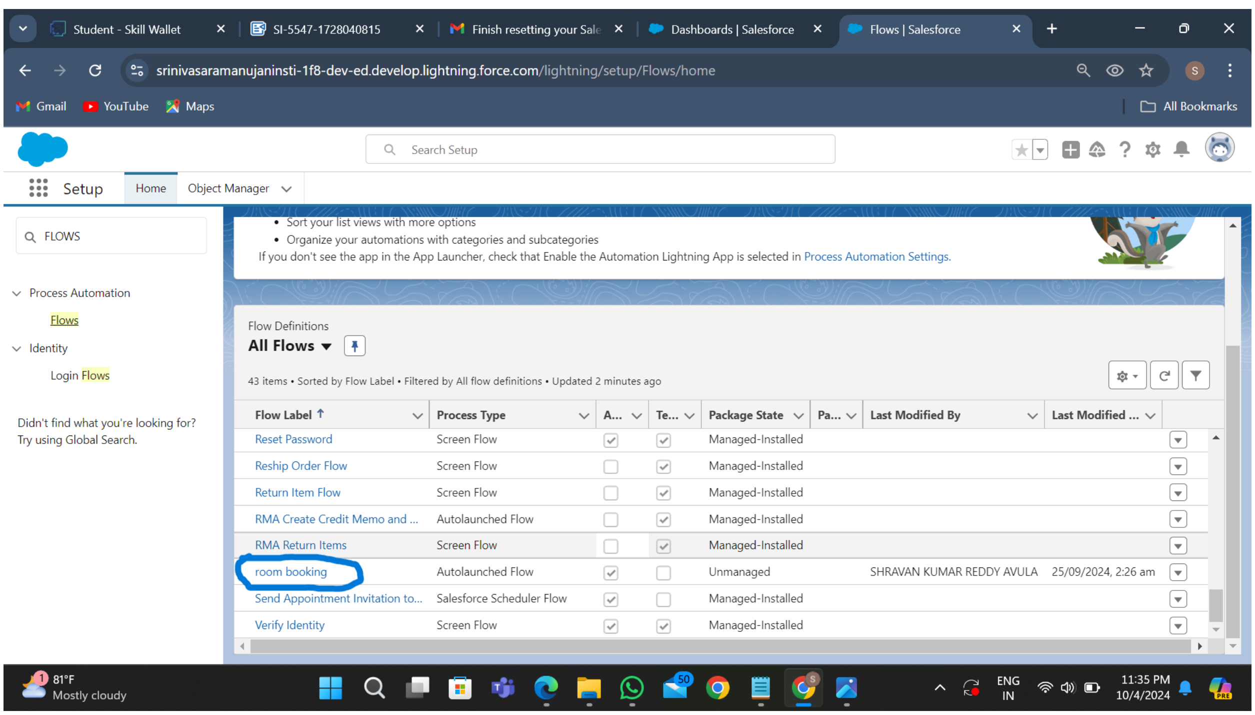
- Field: Amount.
- Value: 30000.
- Click on Done.

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.



Test the Flow

1.Go to App Launcher and search for Co-living and select the app

2.In the Co-living app click on the Room sharing tab and click on new.

3.Enter the details like Name, Room sharing, Ac-3000, Advance payment for 1 Month. And the Amount field is empty before saving the record.