

# Objects Created and their Relationships

A total of six objects were created for this CRM Application to manage the booking of Co-Living Project.

## Total Rooms

The screenshot shows the Salesforce Setup interface for the 'Total Room' object. The left sidebar contains a navigation menu with options like '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', 'Scoping Rules', 'Triggers', 'Flow Triggers', and 'Validation Rules'. The main content area is titled 'Details' and includes a description field, API Name (Total\_Room\_\_c), Custom checkbox, Singular Label (Total Room), Plural Label (Total Rooms), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Buttons for 'Edit' and 'Delete' are visible in the top right corner.

The screenshot shows the Salesforce Setup interface for the 'Total Room' object, specifically the 'Fields & Relationships' tab. The table lists 6 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data rows are as follows:

| FIELD LABEL       | FIELD NAME         | DATA TYPE                            | CONTROLLING FIELD | INDEXED |
|-------------------|--------------------|--------------------------------------|-------------------|---------|
| Created by        | CreatedById        | Lookup(User)                         |                   |         |
| Last Modified By  | LastModifiedById   | Lookup(User)                         |                   |         |
| Owner             | OwnerId            | Lookup(User/Group)                   |                   | ✓       |
| Rooms Available   | Rooms_Available__c | Formula (Number)                     |                   |         |
| Rooms Booked      | Rooms_Booked__c    | Roll-Up Summary (COUNT Room Booking) |                   |         |
| Total No Of Rooms | Name               | Text(80)                             |                   | ✓       |

# CRM Application to Manage the Booking of Co-Living

## Customer

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Customer1

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name  
Customer1\_\_c

Custom

Singular Label  
Customer1

Plural Label  
Customers

Enable Reports  
✓

Track Activities

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

EditDelete

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Customer1

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

| FIELD LABEL       | FIELD NAME           | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|-------------------|----------------------|--------------------|-------------------|---------|
| Created By        | CreatedById          | Lookup(User)       |                   |         |
| Current Status    | Current_Status__c    | Picklist           |                   |         |
| Customer Name     | Name                 | Text(80)           |                   | ✓       |
| Email             | Email__c             | Email              |                   |         |
| Last Modified By  | LastModifiedById     | Lookup(User)       |                   |         |
| Owner             | OwnerId              | Lookup(User,Group) |                   | ✓       |
| Permanent Address | Permanent_Address__c | Text Area(255)     |                   |         |
| Phone no          | Phone_no__c          | Phone              |                   |         |

# CRM Application to Manage the Booking of Co-Living

## Room Booking

Setup

Home

Object Manager

Q Search Setup

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

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

Room\_Booking\_\_c

Custom

✓

Singular Label

Room Booking

Plural Label

Room Bookings

Enable Reports

✓

Track Activities

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Setup

Home

Object Manager

Q Search Setup

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

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

12 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

| 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_Out__c                   | Checkbox                  |                   |         |
| Created By                  | CreatedById                    | Lookup(User)              |                   |         |
| Last Modified By            | LastModifiedById               | Lookup(User)              |                   |         |
| Name                        | Name__c                        | Master-Detail(Customer1)  |                   | ✓       |
| Room No                     | Name                           | Auto Number               |                   | ✓       |
| Room Sharing                | Room_Sharing__c                | Picklist                  |                   |         |
| Rooms Available             | Rooms_Available__c             | Formula (Number)          |                   |         |
| Total No Of Rooms           | Total_No_Of_Rooms__c           | Master-Detail(Total Room) |                   | ✓       |

# CRM Application to Manage the Booking of Co-Living

## Payment

Setup

Home

Object Manager

Search Setup

Payment1

Details

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Description

API Name  
Payment1\_\_c

Custom

Singular Label  
Payment1

Plural Label  
Payments

Enable Reports

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit

Delete

Setup

Home

Object Manager

Search Setup

Payment1

Details

Fields & Relationships

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

| 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(Customer1) |                   |         |
| Payment Mode     | Payment_Mode__c  | Picklist                 |                   |         |
| Payment No       | Name             | Auto Number              |                   |         |
| Room Booking     | Room_Booking__c  | Lookup(Room Booking)     |                   |         |

# CRM Application to Manage the Booking of Co-Living

## Food Selection

Setup

Home

Object Manager

Q Search Setup

Setup > OBJECT MANAGER

Food Selection

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

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

Edit

Delete

Setup

Home

Object Manager

Q Search Setup

Setup > OBJECT MANAGER

Food Selection

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

10 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

| FIELD LABEL       | FIELD NAME          | DATA TYPE                | CONTROLLING FIELD | INDEXED |
|-------------------|---------------------|--------------------------|-------------------|---------|
| Breakfast         | Breakfast__c        | Picklist                 |                   |         |
| Created By        | CreatedById         | Lookup(User)             |                   |         |
| Dinner            | Dinner__c           | Picklist                 |                   |         |
| Food Selection No | Name                | Auto Number              |                   | ✓       |
| Last Modified By  | LastModifiedById    | Lookup(User)             |                   |         |
| Lunch             | Lunch__c            | Picklist                 |                   |         |
| Name              | Name__c             | Master-Detail(Customer1) |                   | ✓       |
| Select Breakfast  | Select_Breakfast__c | Picklist                 | Breakfast         |         |
| Select Dinner     | Select_Dinner__c    | Picklist                 | Dinner            |         |
| Select Lunch      | Select_Lunch__c     | Picklist                 | Lunch             |         |

# CRM Application to Manage the Booking of Co-Living

## Feedback

Setup

Home

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

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

Setup

Home

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

| FIELD LABEL      | FIELD NAME     | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|----------------|--------------------|-------------------|---------|
| Created By       | CreatedBy      | Lookup(User)       |                   |         |
| Feedback No      | Name           | Auto Number        |                   | ✓       |
| Food             | Food_c         | Picklist           |                   |         |
| Internet         | Internet_c     | Picklist           |                   |         |
| Last Modified By | LastModifiedBy | Lookup(User)       |                   |         |
| Name             | Name_c         | Lookup(Customer1)  |                   | ✓       |
| Owner            | OwnerId        | Lookup(User,Group) |                   | ✓       |
| Roomcleaning     | Roomcleaning_c | Picklist           |                   |         |
| Suggestion       | Suggestion_c   | Text Area(255)     |                   |         |

Validation Rules in Room Booking

Setup

Home

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

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Validation Rules

2 Items, Sorted by Rule Name

| RULE NAME      | ERROR LOCATION              | ERROR MESSAGE               | ACTIVE | MODIFIED BY                        |
|----------------|-----------------------------|-----------------------------|--------|------------------------------------|
| check_in_rule  | Check in                    | Check box should be checked | ✓      | Divita Topno, 25/09/2024, 11:49 pm |
| checkbox_field | Advance Payment for 1 Month | Checkbox should be checked  | ✓      | Divita Topno, 25/09/2024, 11:47 pm |

Tabs

Setup

Home

Object Manager

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

| Action                                     | Label           | Tab Style      | Description |
|--|-----------------|----------------|-------------|
| <a href="#">Edit</a> / <a href="#">Del</a> | Customers       | People         |             |
| <a href="#">Edit</a> / <a href="#">Del</a> | Feedbacks       | Checkboard     |             |
| <a href="#">Edit</a> / <a href="#">Del</a> | Food Selections | App            |             |
| <a href="#">Edit</a> / <a href="#">Del</a> | Payments        | Stack of Cash  |             |
| <a href="#">Edit</a> / <a href="#">Del</a> | Room Bookings   | Keys           |             |
| <a href="#">Edit</a> / <a href="#">Del</a> | Total Rooms     | Building Block |             |

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

No Lightning component tabs have been defined

Lightning Page Tabs

No Lightning Page Tabs have been defined

# CRM Application to Manage the Booking of Co-Living

## Profiles

Three custom profiles were created.

### Custom User

Setup

Home

Object Manager

Q. Search Setup

Setup

Profiles

Q. profi

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

Profile

Custom User

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Learn IP Access | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definitions Access | Enabled Flow Access | Enabled Secure Resource Status Access | Enabled Custom Permissions

Profile Detail

Name

Custom User

Edit

Clone

Delete

View Users

User License

Salesforce

Custom Profile

✓

Description

Created By

Disha Toora

25/09/2024, 11:50 pm

Modified By

Disha Toora

25/09/2024, 11:52 pm

Page Layouts

Standard Object Layouts

|                            |  |                                  |  |
|----------------------------|--|----------------------------------|--|
| Global                     | Global Layout<br>(View Assignment)                     | Location Group                   | Location Group Layout<br>(View Assignment)                   |
| Email Application          | Not Assigned<br>(View Assignment)                      | Location Group Assignment        | Location Group Assignment Layout<br>(View Assignment)        |
| Home Page Layout           | DE Default<br>(View Assignment)                        | Macro                            | Macro Layout<br>(View Assignment)                            |
| Account                    | Account Layout<br>(View Assignment)                    | Object Milestone                 | Object Milestone Layout<br>(View Assignment)                 |
| Alternative Payment Method | Alternative Payment Method Layout<br>(View Assignment) | Operating Hours                  | Operating Hours Layout<br>(View Assignment)                  |
| Appointment Invitation     | Appointment Invitation Layout<br>(View Assignment)     | Opportunity                      | Opportunity Layout<br>(View Assignment)                      |
| Asset                      | Asset Layout<br>(View Assignment)                      | Opportunity Product              | Opportunity Product Layout<br>(View Assignment)              |
| Asset Action               | Asset Action Layout<br>(View Assignment)               | Order                            | Order Layout<br>(View Assignment)                            |
| Asset Action Source        | Asset Action Source Layout<br>(View Assignment)        | Order Product                    | Order Product Layout<br>(View Assignment)                    |
| Asset Relationship         | Asset Relationship Layout<br>(View Assignment)         | Payment                          | Payment Layout<br>(View Assignment)                          |
| Asset State Period         | Asset State Period Layout<br>(View Assignment)         | Payment Authorization            | Payment Authorization Layout<br>(View Assignment)            |
| Assigned Resource          | Assigned Resource Layout<br>(View Assignment)          | Payment Authorization Adjustment | Payment Authorization Adjustment Layout<br>(View Assignment) |
| Associated Location        | Associated Location Layout<br>(View Assignment)        | Payment Gateway                  | Payment Gateway Layout<br>(View Assignment)                  |

Locations

|                            |   |   |   |   |   |   |
|----------------------------|---|---|---|---|---|---|
| Locations                  | ✓ | ✓ | ✓ | □ | □ | □ |
| Location Groups            | □ | □ | □ | □ | □ | □ |
| Location Group Assignments | □ | □ | □ | □ | □ | □ |
| Macros                     | ✓ | □ | □ | □ | □ | □ |

Work Step Templates

|                     |   |   |   |   |   |   |
|---------------------|---|---|---|---|---|---|
| Work Step Templates | ✓ | ✓ | ✓ | □ | ✓ | □ |
| Work Types          | ✓ | ✓ | ✓ | □ | □ | □ |
| Work Type Groups    | ✓ | ✓ | ✓ | □ | □ | □ |

Custom Object Permissions

|                 | Basic Access |        |      |        | Data Administration |            |
|-----------------|--------------|--------|------|--------|---------------------|------------|
|                 | Read         | Create | Edit | Delete | View All            | Modify All |
| Customers       | ✓            | ✓      | ✓    | ✓      | ✓                   | ✓          |
| Feedbacks       | ✓            | ✓      | ✓    | ✓      | ✓                   | ✓          |
| Food Selections | ✓            | ✓      | ✓    | ✓      | ✓                   | ✓          |

|               | Basic Access |        |      |        | Data Administration |            |
|---------------|--------------|--------|------|--------|---------------------|------------|
|               | Read         | Create | Edit | Delete | View All            | Modify All |
| Payments      | ✓            | ✓      | ✓    | ✓      | ✓                   | ✓          |
| Room Bookings | ✓            | ✓      | ✓    | ✓      | ✓                   | ✓          |
| Total Rooms   | ✓            | ✓      | ✓    | ✓      | ✓                   | ✓          |

Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

None

Password Policies

User passwords expire in

90 days

Enforce password history

3 passwords remembered

Minimum password length

8

Password complexity requirement

Must include alpha and numeric characters

Password question requirement

Cannot contain password

Maximum invalid login attempts

10

Lockout effective period

15 minutes

Obscure secret answer for password resets

☐

Require a minimum 1 day password lifetime

☐

Don't immediately expire links in forgot password emails

☐

Save

Save & New

Cancel



# CRM Application to Manage the Booking of Co-Living

## Custom Platform User1

Setup

Home

Object Manager

Q profi

Users

Profiles

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

Q Search Setup

Setup

Profiles

Profile Custom platform User1

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Learn IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled External Credential Access | Enabled External Credential Protocol Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

NameCustom platform User1

User LicenseSalesforce Platform

Description

Created ByDisha Topno, 26/09/2024, 12:17 am

Modified ByDisha Topno, 26/09/2024, 12:17 am

Edit

Clone

Delete

View Users

Page Layouts

Standard Object Layouts

GlobalGlobal Layout

Email ApplicationNot Assigned

Home Page LayoutHome Page Default

AccountAccount Layout

Alternative Payment MethodAlternative Payment Method Layout

Appointment InvitationAppointment Invitation Layout

AssetAsset Layout

Asset RelationshipAsset Relationship Layout

Assigned ResourceAssigned Resource Layout

Associated LocationAssociated Location Layout

Async Operation LogAsync Operation Log Layout

Authorization FormAuthorization Form Layout

Authorization Form ConsentAuthorization Form Consent Layout

Invoice LineInvoice Line Layout

LeadLead Layout

LocationLocation Layout

Location GroupLocation Group Layout

Location Group AssignmentLocation Group Assignment Layout

Object MilestoneObject Milestone Layout

Operating HoursOperating Hours Layout

OrderOrder Layout

Order ProductOrder Product Layout

PaymentPayment Layout

Payment AuthorizationPayment Authorization Layout

Payment Authorization AdjustmentPayment Authorization Adjustment Layout

Payment GatewayPayment Gateway Layout

Q Search Setup

Setup

Profiles

Contacts

Contact Point Address

Contact Point Consents

Contact Point Emails

Custom Object Permissions

Basic Access

Read

Create

Edit

Delete

Data Administration

View All

Modify All

Customers

Feedbacks

Food Selections

Push Topics

Sellers

Streaming Channels

User External Credentials

Session Settings

Session Times Out After2 hours of inactivity

Session Security Level Required at Login--None--

Password Policies

User passwords expire in90 days

Enforce password history3 passwords remembered

Minimum password length8

Password complexity requirementMust include alpha and numeric characters

Password question requirementCannot contain password

Maximum invalid login attempts10

Lockout effective period15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save

Save & New

Cancel

# CRM Application to Manage the Booking of Co-Living

## Custom Platform User2

Setup

Home

Object Manager

Q Search Setup

Q profi

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Profiles

Profile

Custom platform User2

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Layout IP Records | Enabled Area Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Personal Access | Enabled Custom Metadata Type Access | Enabled Custom Settings Definitions Access | Enabled Flow Access | Enabled Record Permission Status Access | Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

Name

Custom platform User2

User License

Salesforce Platform

Description

Custom Profile

Created By

Disha Toora, 26/09/2024, 12:10 am

Modified By

Disha Toora, 26/09/2024, 12:10 am

Page Layouts

Standard Object Layouts

Global

Global Layout

View Assignment

Email Application

Not Assigned

View Assignment

Home Page Layout

Home Page Default

View Assignment

Account

Account Layout

View Assignment

Alternative Payment Method

Alternative Payment Method Layout

View Assignment

Appointment Invitation

Appointment Invitation Layout

View Assignment

Asset

Asset Layout

View Assignment

Asset Relationship

Asset Relationship Layout

View Assignment

Assigned Resource

Assigned Resource Layout

View Assignment

Associated Location

Associated Location Layout

View Assignment

Async Operation Log

Async Operation Log Layout

View Assignment

Authorization Form

Authorization Form Layout

View Assignment

Authorization Form Consent

Authorization Form Consent Layout

View Assignment

Invoice Line

Invoice Line Layout

View Assignment

Lead

Lead Layout

View Assignment

Location

Location Layout

View Assignment

Location Group

Location Group Layout

View Assignment

Location Group Assignment

Location Group Assignment Layout

View Assignment

Object Milestone

Object Milestone Layout

View Assignment

Operating Hours

Operating Hours Layout

View Assignment

Order

Order Layout

View Assignment

Order Product

Order Product Layout

View Assignment

Payment

Payment Layout

View Assignment

Payment Authorization

Payment Authorization Layout

View Assignment

Payment Authorization Adjustment

Payment Authorization Adjustment Layout

View Assignment

Payment Gateway

Payment Gateway Layout

View Assignment

SETUP

Profiles

Contacts

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Push Topics

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

Basic Access

Read

Create

Edit

Delete

Data Administration

View All

Modify All

Customers

Feedbacks

Food Selections

Payments

Room Bookings

Total Rooms

Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

None

Password Policies

User passwords expire in

90 days

Enforce password history

3 passwords remembered

Minimum password length

8

Password complexity requirement

Must include alpha and numeric characters

Password question requirement

Cannot contain password

Maximum invalid login attempts

10

Lockout effective period

15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save

Save & New

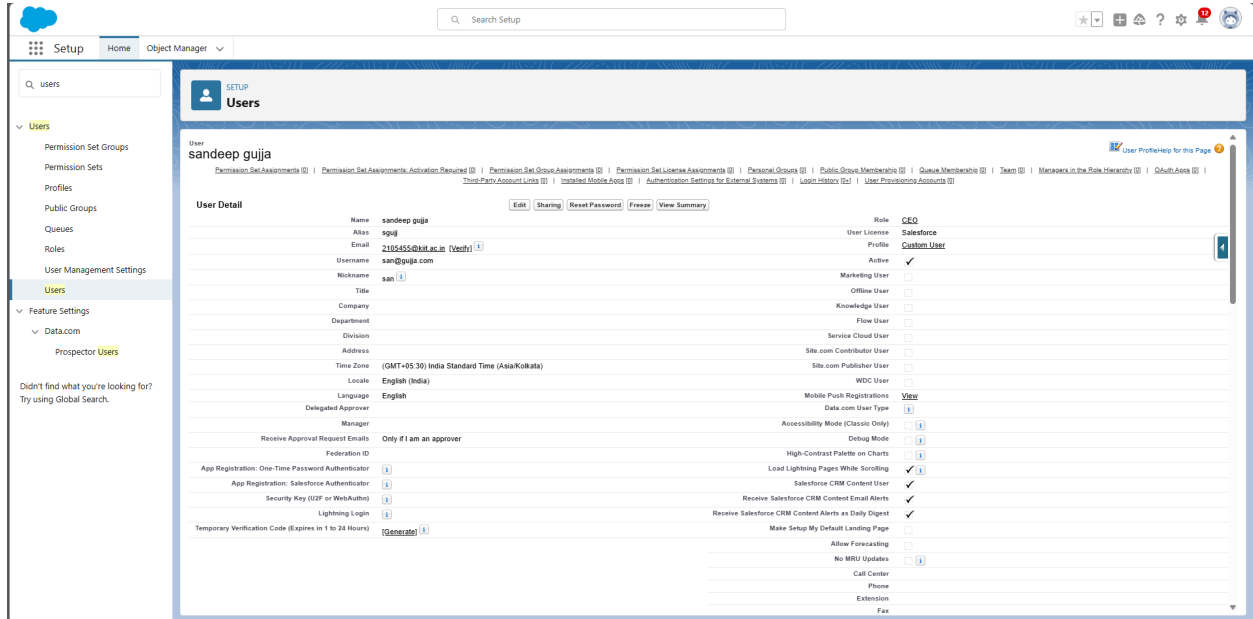
Cancel

# CRM Application to Manage the Booking of Co-Living

## Users

Three users were created for this project.

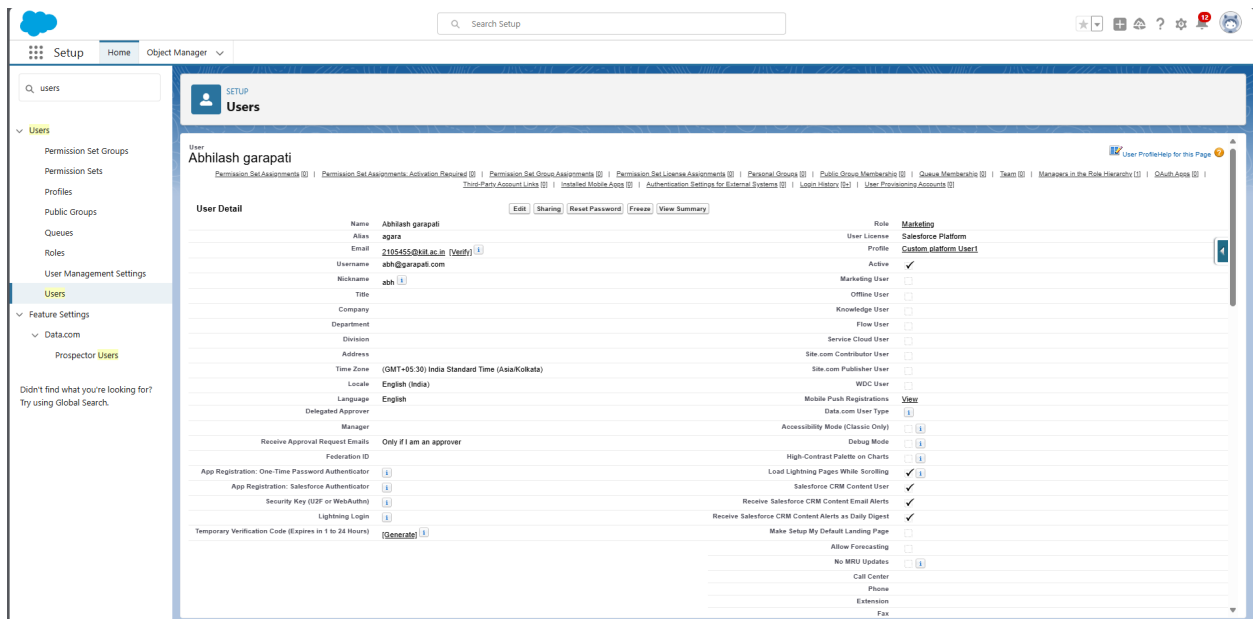
### User 1



The screenshot shows the Salesforce Setup page for a user named "sandeep guja". The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the user's details and settings. The user's name is "sandeep guja", email is "2105455@mit.ac.in", and username is "san@guja.com". The user's role is "CEO" and the user license is "Salesforce". The user is active and has a profile of "Custom User". The user's time zone is "GMT+05:30 India Standard Time (Asia/Kolkata)", language is "English (India)", and locale is "English". The user's manager is "Only if I am an approver". The user's federation ID is "Only if I am an approver". The user's app registration settings are "App Registration: One-Time Password Authenticator", "App Registration: Salesforce Authenticator", "Security Key (U2F or WebAuthn)", "Lightning Login", and "Temporary Verification Code (Expires in 1 to 24 Hours)". The user's permissions are "Marketing User", "Offline User", "Knowledge User", "Flow User", "Service Cloud User", "Site.com Contributor User", "Site.com Publisher User", "WDC User", "Mobile Push Registrations", "Data.com User Type", "Accessibility Mode (Classic Only)", "Debug Mode", "High-Contrast Palette on Charts", "Load Lightning Pages While Scrolling", "Salesforce CRM Content User", "Receive Salesforce CRM Content Email Alerts", "Receive Salesforce CRM Content Alerts as Daily Digest", "Make Setup My Default Landing Page", "Allow Forecasting", "No MRU Updates", "Call Center", "Phone", "Extension", and "Fax".

| User Detail  |  |
|--|--|
| Name   | sandeep guja                                   |
| Alias  | sguja  |
| Email  | 2105455@mit.ac.in (Verify)                     |
| Username   | san@guja.com                                   |
| Nickname   | san  |
| Title  |  |
| Company  |  |
| Department   |  |
| Division   |  |
| Address  |  |
| Time Zone  | (GMT+05:30) India Standard Time (Asia/Kolkata) |
| Locale   | English (India)                                |
| Language   | English  |
| Delegated Approver                                     |  |
| Manager  |  |
| Receive Approval Request Emails                        | Only if I am an approver                       |
| Federation ID  |  |
| App Registration: One-Time Password Authenticator      |  |
| App Registration: Salesforce Authenticator             |  |
| Security Key (U2F or WebAuthn)                         |  |
| Lightning Login  |  |
| Temporary Verification Code (Expires in 1 to 24 Hours) | (Generate)                                     |
| 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"/>                       |
| Site.com Contributor User                              | <input type="checkbox"/>                       |
| Site.com Publisher User                                | <input type="checkbox"/>                       |
| WDC User   | <input type="checkbox"/>                       |
| Mobile Push Registrations                              | View   |
| Data.com User Type                                     |  |
| Accessibility Mode (Classic Only)                      | <input type="checkbox"/>                       |
| Debug Mode   | <input type="checkbox"/>                       |
| High-Contrast Palette on Charts                        | <input type="checkbox"/>                       |
| Load Lightning Pages While Scrolling                   | <input checked="" type="checkbox"/>            |
| Salesforce CRM Content User                            | <input checked="" type="checkbox"/>            |
| Receive Salesforce CRM Content Email Alerts            | <input checked="" type="checkbox"/>            |
| Receive Salesforce CRM Content Alerts as Daily Digest  | <input checked="" type="checkbox"/>            |
| Make Setup My Default Landing Page                     | <input type="checkbox"/>                       |
| Allow Forecasting                                      | <input type="checkbox"/>                       |
| No MRU Updates   | <input type="checkbox"/>                       |
| Call Center  | <input type="checkbox"/>                       |
| Phone  | <input type="checkbox"/>                       |
| Extension  |  |
| Fax  |  |

### User 2



The screenshot shows the Salesforce Setup page for a user named "Abhilash garapati". The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the user's details and settings. The user's name is "Abhilash garapati", email is "2105455@mit.ac.in", and username is "abh@garapati.com". The user's role is "Marketing" and the user license is "Salesforce Platform". The user is active and has a profile of "Custom platform User1". The user's time zone is "GMT+05:30 India Standard Time (Asia/Kolkata)", language is "English (India)", and locale is "English". The user's manager is "Only if I am an approver". The user's federation ID is "Only if I am an approver". The user's app registration settings are "App Registration: One-Time Password Authenticator", "App Registration: Salesforce Authenticator", "Security Key (U2F or WebAuthn)", "Lightning Login", and "Temporary Verification Code (Expires in 1 to 24 Hours)". The user's permissions are "Marketing User", "Offline User", "Knowledge User", "Flow User", "Service Cloud User", "Site.com Contributor User", "Site.com Publisher User", "WDC User", "Mobile Push Registrations", "Data.com User Type", "Accessibility Mode (Classic Only)", "Debug Mode", "High-Contrast Palette on Charts", "Load Lightning Pages While Scrolling", "Salesforce CRM Content User", "Receive Salesforce CRM Content Email Alerts", "Receive Salesforce CRM Content Alerts as Daily Digest", "Make Setup My Default Landing Page", "Allow Forecasting", "No MRU Updates", "Call Center", "Phone", "Extension", and "Fax".

| User Detail  |  |
|--|--|
| Name   | Abhilash garapati                              |
| Alias  | agara  |
| Email  | 2105455@mit.ac.in (Verify)                     |
| Username   | abh@garapati.com                               |
| Nickname   | abh  |
| Title  |  |
| Company  |  |
| Department   |  |
| Division   |  |
| Address  |  |
| Time Zone  | (GMT+05:30) India Standard Time (Asia/Kolkata) |
| Locale   | English (India)                                |
| Language   | English  |
| Delegated Approver                                     |  |
| Manager  |  |
| Receive Approval Request Emails                        | Only if I am an approver                       |
| Federation ID  |  |
| App Registration: One-Time Password Authenticator      |  |
| App Registration: Salesforce Authenticator             |  |
| Security Key (U2F or WebAuthn)                         |  |
| Lightning Login  |  |
| Temporary Verification Code (Expires in 1 to 24 Hours) | (Generate)                                     |
| Role   | Marketing                                      |
| User License   | Salesforce Platform                            |
| Profile  | Custom platform User1                          |
| 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"/>                       |
| Site.com Contributor User                              | <input type="checkbox"/>                       |
| Site.com Publisher User                                | <input type="checkbox"/>                       |
| WDC User   | <input type="checkbox"/>                       |
| Mobile Push Registrations                              | View   |
| Data.com User Type                                     |  |
| Accessibility Mode (Classic Only)                      | <input type="checkbox"/>                       |
| Debug Mode   | <input type="checkbox"/>                       |
| High-Contrast Palette on Charts                        | <input type="checkbox"/>                       |
| Load Lightning Pages While Scrolling                   | <input checked="" type="checkbox"/>            |
| Salesforce CRM Content User                            | <input checked="" type="checkbox"/>            |
| Receive Salesforce CRM Content Email Alerts            | <input checked="" type="checkbox"/>            |
| Receive Salesforce CRM Content Alerts as Daily Digest  | <input checked="" type="checkbox"/>            |
| Make Setup My Default Landing Page                     | <input type="checkbox"/>                       |
| Allow Forecasting                                      | <input type="checkbox"/>                       |
| No MRU Updates   | <input type="checkbox"/>                       |
| Call Center  | <input type="checkbox"/>                       |
| Phone  | <input type="checkbox"/>                       |
| Extension  |  |
| Fax  |  |

# CRM Application to Manage the Booking of Co-Living

## User 3

Setup

Home

Object Manager

Q Search Setup

Q Search Setup

Q users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?

Try using Global Search.

SETUP

Users

User

Ganesh gelli

Permission Set Assignments | Permission Set Assignments Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Permission Set Groups | Public Group Memberships | Queue Memberships | Team | Members in the Role Hierarchy | Default Areas

Third Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

Edit | Sharing | Reset Password | Freeze | View Summary

|  |  |   |                                     |
|--|--|---|-------------------------------------|
| Name   | Ganesh gelli                                   | Role  | Recruiter                           |
| Alias  | ggelli   | User License  | Salesforce Platform                 |
| Email  | 2105455@kail.ac.in (Verify)                    | Profile   | Custom platform User?               |
| Username   | gan@gelli.com                                  | Active  | <input checked="" type="checkbox"/> |
| Nickname   | gan  | Marketing User  | <input type="checkbox"/>            |
| Title  |  | Offline User  | <input type="checkbox"/>            |
| Company  |  | Knowledge User  | <input type="checkbox"/>            |
| Department   |  | Flow User   | <input type="checkbox"/>            |
| Division   |  | Service Cloud User                                    | <input type="checkbox"/>            |
| Address  |  | Site.com Contributor User                             | <input type="checkbox"/>            |
| Time Zone  | (GMT+05:30) India Standard Time (Asia/Kolkata) | Site.com Publisher User                               | <input type="checkbox"/>            |
| Locale   | English (India)                                | WDC User  | <input type="checkbox"/>            |
| Language   | English  | Mobile Push Registrations                             | View                                |
| Delegated Approver                                     |  | Data.com User Type                                    | 1                                   |
| Manager  |  | Accessibility Mode (Classic Only)                     | 1                                   |
| Receive Approval Request Emails                        | Only if I am an approver                       | Debug Mode  | 1                                   |
| Federation ID  |  | High-Contrast Palette on Charts                       | 1                                   |
| App Registration: One-Time Password Authenticator      | 1  | Load Lightning Pages While Scrolling                  | 1                                   |
| App Registration: Salesforce Authenticator             | 1  | Salesforce CRM Content User                           | <input checked="" type="checkbox"/> |
| Security Key (OTP or WebAuthn)                         | 1  | Receive Salesforce CRM Content Email Alerts           | <input checked="" type="checkbox"/> |
| Lightning Login  | 1  | Receive Salesforce CRM Content Alerts as Daily Digest | <input checked="" type="checkbox"/> |
| Temporary Verification Code (Expires in 1 to 24 Hours) | (Generate) 1                                   | Make Setup My Default Landing Page                    | <input type="checkbox"/>            |
|  |  | Allow Forecasting                                     | <input type="checkbox"/>            |
|  |  | No MRU Updates  | 1                                   |
|  |  | Call Center   |                                     |
|  |  | Phone   |                                     |
|  |  | Extension   |                                     |
|  |  | Fax   |                                     |

Flow

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Room Booking Report

Payment Status

Update Amount Field | Flow

Search...

Star

Share

Help

Settings

Profile

Flow

Update Amount Field

Open Flow

Open Latest Version

Change Owner

Type

Record—Run After Save

Associated Record

Progress Status

Draft

Last Modified Date

26/09/2024, 1:59 am

Flow Owner

Divita Topno

Related

Details

Information

Flow Label

Update Amount Field

API Name

Update\_Amount\_Field

Description

Record-Triggered After Save Flow

Flow Type

Record-Triggered After Save Flow

Associated Record

Created Date

26/09/2024, 1:33 am

Created By

Divita Topno, 26/09/2024, 1:33 am

Last Modified

Divita Topno, 26/09/2024, 1:59 am

Subcategory

Category

Flow Builder

Update Amount Field - V3

Select Elements

Auto-Layout

Version 3: Last modified 23 minutes ago

Active

Run

Debug

View Tests

Deactivate

Save As

Save

Record Triggered Flow

Start

Run Immediately

Field should be Update

Decision

Single sharing

Double sharing

Triple sharing

Single Ac

Double Ac

Triple Ac

Default Outcome

Single Update Records

Double Update Records

Triple Update Records

Single ac1 Update Records

Double ac1 Update Records

Triple ac1 Update Records

End

End

End

End

End

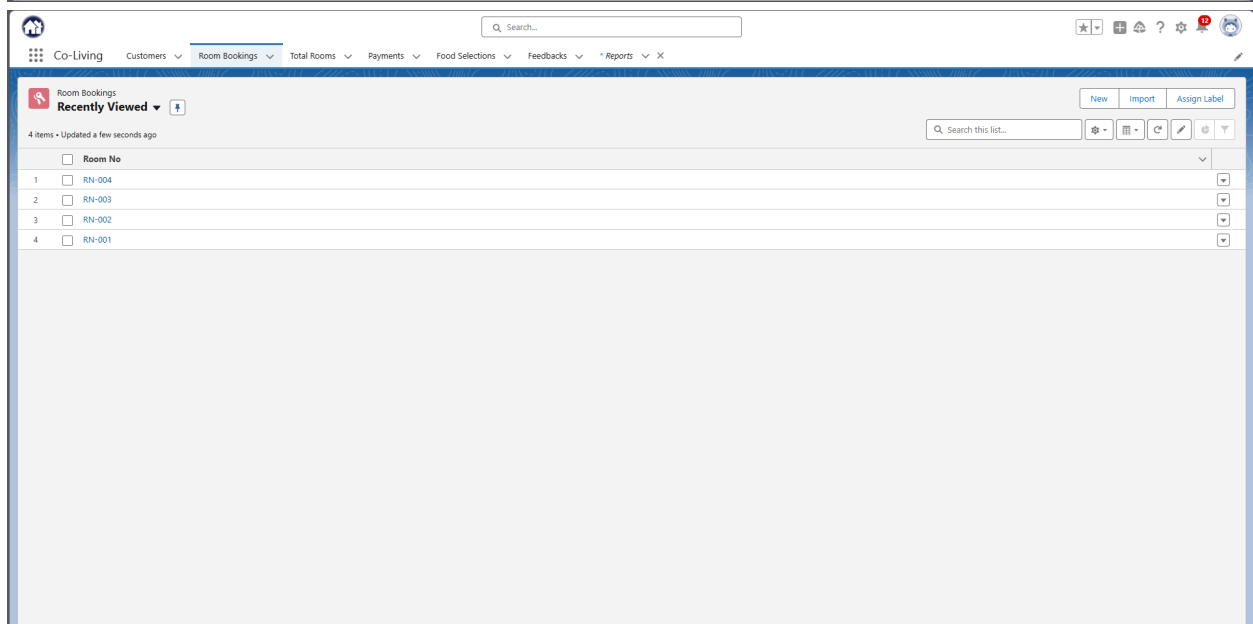
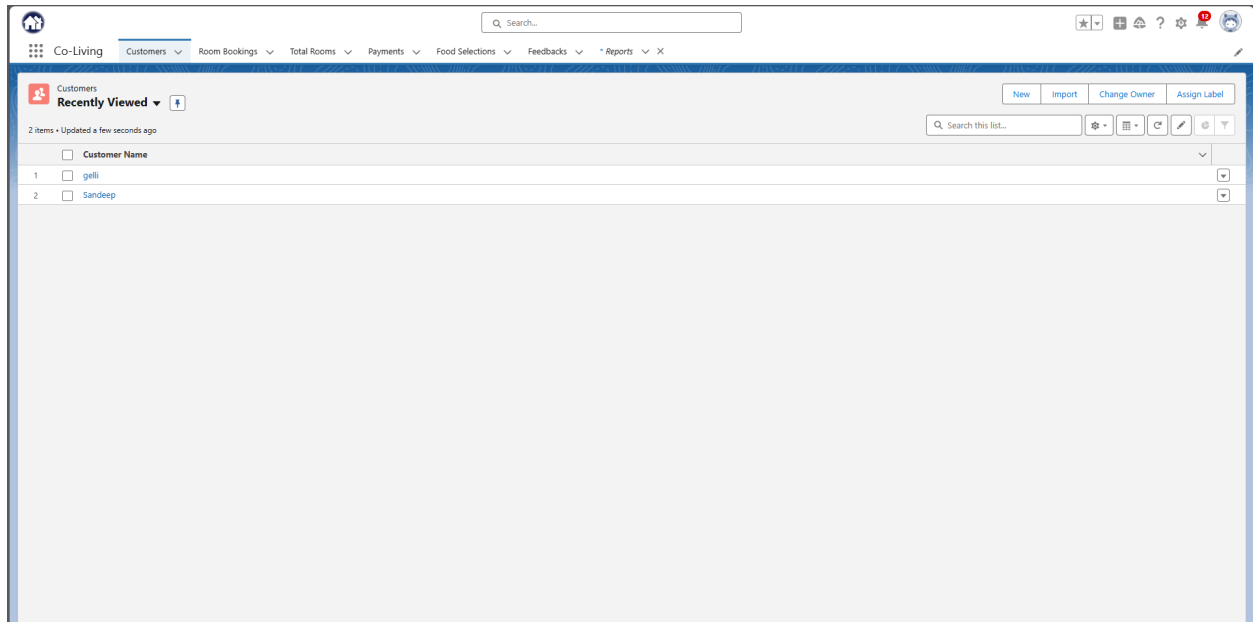
End

End

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

# APP Walkthrough

A glimpse of what the app will look like with a few examples.



# CRM Application to Manage the Booking of Co-Living

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Reports

Search...

Total Rooms

Recently Viewed

2 items • Updated a few seconds ago

Search this list...

Total No Of Rooms

1

2

2

1

Payments

Recently Viewed

2 items • Updated a few seconds ago

Search this list...

Payment No

1

PNO-002

2

PNO-001

Page No : 15

CRM Application to Manage the Booking of Co-Living

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Reports

Q Search...

★

+

📄

🔍

⚙️

🔔

👤

Food Selection

FS No-002

New ContactEditNew Opportunity

RelatedDetails

Food Selection No

FS No-002

Name

Sandeep

Breakfast

Tuesday

Select Breakfast

Idli

Lunch

Tuesday

Select Lunch

Egg noodles

Dinner

Tuesday

Select Dinner

Meals

Created By

Divita Topno - 26/09/2024, 11:07 am

Last Modified By

Divita Topno - 26/09/2024, 11:07 am

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Reports

Q Search...

★

+

📄

🔍

⚙️

🔔

👤

Feedback

Fd No-0001

New ContactEditNew Opportunity

RelatedDetails

Feedback No

Fd No-0001

Name

Sandeep

Roomcleaning

Satisfaction

Internet

Satisfaction

Food

Good

Suggestion

Owner

Divita Topno

Created By

Divita Topno - 26/09/2024, 11:09 am

Last Modified By

Divita Topno - 26/09/2024, 11:09 am

Page No : 16



# CRM Application to Manage the Booking of Co-Living

## Reports

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Room Booking Report

Search...

Star

Grid

Print

Help

17

Profile

Reports

Recent

2 items

Search recent reports...

New Report

New Folder

Settings

| REPORTS         | Report Name         | Description | Folder          | Created By   | Created On          | Subscribed |
|-----------------|---------------------|-------------|-----------------|--------------|---------------------|------------|
| Recent          | Payment Status      |             | Private Reports | Divita Topno | 26/9/2024, 12:44 am |            |
| Created by Me   | Room Booking Report |             | Private Reports | Divita Topno | 26/9/2024, 12:42 am |            |
| Private Reports |                     |             |                 |              |                     |            |
| Public Reports  |                     |             |                 |              |                     |            |
| All Reports     |                     |             |                 |              |                     |            |
| FOLDERS         |                     |             |                 |              |                     |            |
| All Folders     |                     |             |                 |              |                     |            |
| Created by Me   |                     |             |                 |              |                     |            |
| Shared with Me  |                     |             |                 |              |                     |            |
| FAVORITES       |                     |             |                 |              |                     |            |
| All Favorites   |                     |             |                 |              |                     |            |

## Room Booking and Total Room

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Room Booking Report

Search...

Star

Grid

Print

Help

17

Profile

Report: Customers with Room Bookings and Total Rooms

Room Booking Report

Enable Field Editing

Search

Add Chart

Filter

Edit

Total Records

Total AC-3000

Total Amount

Total Advance Payment for 1 Month

| Customer: Customer Name              | Room Booking: Room No | Total No Of Rooms: Total No Of Rooms | Current Status | Phone no    | Email             | Permanent Address | AC-3000                             | Amount    | Advance Payment for 1 Month         |
|--------------------------------------|-----------------------|--------------------------------------|----------------|-------------|-------------------|-------------------|-------------------------------------|-----------|-------------------------------------|
| <input type="checkbox"/> gelli (2)   | RN-002                | 1                                    | Student        | 08250572529 | 2105455@kit.ac.in | Patia             | <input checked="" type="checkbox"/> | ₹30,000   | <input checked="" type="checkbox"/> |
|                                      | RN-003                | 1                                    | Student        | 08250572529 | 2105455@kit.ac.in | Patia             | <input checked="" type="checkbox"/> | ₹30,000   | <input checked="" type="checkbox"/> |
| Subtotal                             |                       |                                      |                |             |                   |                   | 2                                   | ₹60,000   | 2                                   |
| <input type="checkbox"/> Sandeep (2) | RN-001                | 2                                    | Employee       | 8250572529  | 2105455@kit.ac.in | India             | <input checked="" type="checkbox"/> | ₹34,000   | <input checked="" type="checkbox"/> |
|                                      | RN-004                | 2                                    | Employee       | 8250572529  | 2105455@kit.ac.in | India             | <input checked="" type="checkbox"/> | ₹26,000   | <input checked="" type="checkbox"/> |
| Subtotal                             |                       |                                      |                |             |                   |                   | 2                                   | ₹60,000   | 2                                   |
| Total (4)                            |                       |                                      |                |             |                   |                   | 4                                   | ₹1,20,000 | 4                                   |

Row Counts

Detail Rows

Subtotals

Grand Total

# CRM Application to Manage the Booking of Co-Living

## Room Booking and Payment

Co-Living

CustomersRoom BookingsTotal RoomsPaymentsFood SelectionsFeedbacksPayment Status

Search...

StarGridShareHelpSettingsNotificationsProfile

Report: Customers with Payments and Room Booking

Payment Status

Enable Field Editing

Add Chart

Filter

Export

Edit

Total Records

2

Total Amount

₹64,000.00

| Customer: Customer Name              | Payment: Payment No | Room Booking: Room No | Current Status | Phone no    | Email             | Amount     | Payment Mode |
|--------------------------------------|---------------------|-----------------------|----------------|-------------|-------------------|------------|--------------|
| <input type="checkbox"/> gelli (1)   | PNO-001             | RN-002                | Student        | 08250572529 | 2105455@kit.ac.in | ₹30,000.00 | Check        |
| Subtotal                             |                     |                       |                |             |                   | ₹30,000.00 |              |
| <input type="checkbox"/> Sandeep (1) | PNO-002             | RN-001                | Employee       | 8250572529  | 2105455@kit.ac.in | ₹34,000.00 | Cash         |
| Subtotal                             |                     |                       |                |             |                   | ₹34,000.00 |              |
| Total (2)                            |                     |                       |                |             |                   | ₹64,000.00 |              |

Row Counts

Detail Rows

Subtotals

Grand Total

## Dashboard

Co-Living

CustomersRoom BookingsTotal RoomsPaymentsFood SelectionsFeedbacksRoom Booking ReportRoom Booking Status

Search...

StarGridShareHelpSettingsNotificationsProfile

Dashboards

Recent

Search recent dashboards...

New Dashboard

New Folder

Settings

| DASHBOARDS    | Dashboard Name      | Description | Folder             | Created By   | Created On          | Subscribed |
|---------------|---------------------|-------------|--------------------|--------------|---------------------|------------|
| Recent        | Room Booking Status |             | Private Dashboards | Divita Topno | 26/9/2024, 12:47 am |            |
| Created by Me | Payment Status      |             | Private Dashboards | Divita Topno | 26/9/2024, 11:13 am |            |

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

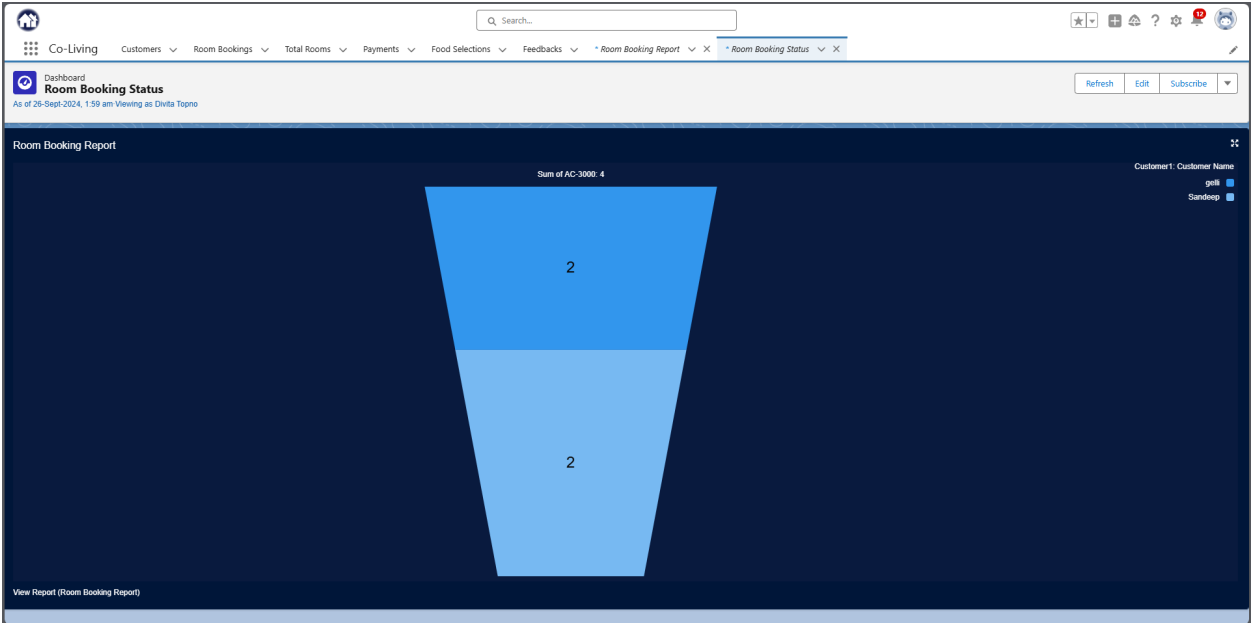
Shared with Me

FAVORITES

All Favorites

# CRM Application to Manage the Booking of Co-Living

## Dashboard with room booking



## Dashboard with payment

The dashboard displays a table titled "Payment Status". The table has five columns: Payment No., Room Booking: Room No., Phone no., Email, and Payment Mode. The data is as follows:

| Payment No. | Room Booking: Room No. | Phone no.   | Email             | Payment Mode |
|-------------|------------------------|-------------|-------------------|--------------|
| PHO-001     | RN-002                 | 98250572529 | 2105455@kit.ac.in | Check        |
| PHO-002     | RN-001                 | 8250572529  | 2105455@kit.ac.in | Cash         |
| PHO-003     | RN-005                 | 100254321   | mrc@gmail.com     | Gpay         |

The top navigation bar includes a search bar and several menu items: Co-Living, Customers, Room Bookings, Total Rooms, Payments, Food Selections, Feedbacks, Payment Status, and Payment Status. The left sidebar shows the "Payment Status" section. The bottom right corner indicates "Customer 1: Customer Name" with a dropdown menu showing "gell" and "Sandeep".

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

### EXAMPLE

We create a customer Michael and provide his details. We will be able to observe how making this customer profile will affect all the other components of the Co-Living app.

The screenshot shows the 'Co-Living' CRM application interface. The top navigation bar includes a search bar and a menu with options: Customers, Room Bookings, Total Rooms, Payments, Food Selections, Feedbacks, and Reports. The main header identifies the user as 'Customer1 Michael' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing a form with the following fields:

| Field             | Value                               | Action |
|-------------------|-------------------------------------|--------|
| Customer Name     | Michael                             | Edit   |
| Owner             | Divita Topno                        | Link   |
| Phone no          | 1002554321                          | Edit   |
| Email             | mic@gmail.com                       | Edit   |
| Permanent Address | Delhi, India                        | Edit   |
| Current Status    | Employee                            | Edit   |
| Created By        | Divita Topno - 26/09/2024, 11:20 am | Link   |
| Last Modified By  | Divita Topno - 26/09/2024, 11:20 am | Link   |

The bottom screenshot shows the 'Room Booking' page for 'RN-005'. The 'Details' tab is active, displaying booking information:

| Field                       | Value                               | Action |
|-----------------------------|-------------------------------------|--------|
| Room No                     | RN-005                              | Link   |
| Room Sharing                | Single sharing                      | Edit   |
| Name                        | Michael                             | Link   |
| AC-3000                     | <input checked="" type="checkbox"/> | Edit   |
| Advance Payment for 1 Month | <input checked="" type="checkbox"/> | Edit   |
| Amount                      | ₹34,000                             | Edit   |
| Total No Of Rooms           | 1                                   | Edit   |
| Rooms Available             | 27                                  | Edit   |
| Check in                    | <input checked="" type="checkbox"/> | Edit   |
| Check Out                   | <input type="checkbox"/>            | Edit   |
| Created By                  | Divita Topno - 26/09/2024, 11:21 am | Link   |
| Last Modified By            | Divita Topno - 26/09/2024, 11:22 am | Link   |

# CRM Application to Manage the Booking of Co-Living

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Reports

Q Search...

Total Room

1

New Contact

Edit

New Opportunity

Related

Details

Total No Of Rooms

1

Rooms Booked

3

Rooms Available

27

Created By

Divita Topno

26/09/2024, 1:45 am

Owner

Divita Topno

Last Modified By

Divita Topno

26/09/2024, 11:21 am

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Reports

Q Search...

Payment1

PNO-003

New Contact

Edit

New Opportunity

Related

Details

Payment No

PNO-003

Name

Michael

Room Booking

RN-005

Payment Mode

Gpay

Amount

₹34,000.00

Created By

Divita Topno

26/09/2024, 11:24 am

Last Modified By

Divita Topno

26/09/2024, 11:24 am

# CRM Application to Manage the Booking of Co-Living

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Reports

Q Search...

Food Selection

FS No-003

New ContactEditNew Opportunity

RelatedDetails

Food Selection No

FS No-003

Name

Michael

Breakfast

Wednesday

Select Breakfast

Dosa

Lunch

Wednesday

Select Lunch

Chicken fried rice

Dinner

Wednesday

Select Dinner

Egg fried rice

Created By

Divita Topno - 26/09/2024, 11:25 am

Last Modified By

Divita Topno - 26/09/2024, 11:25 am

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Reports

Q Search...

Feedback

Fd No-0002

New ContactEditNew Opportunity

RelatedDetails

Feedback No

Fd No-0002

Name

Michael

Roomcleaning

Satisfaction

Internet

Good

Food

Good

Suggestion

Created By

Divita Topno - 26/09/2024, 11:27 am

Owner

Divita Topno

Last Modified By

Divita Topno - 26/09/2024, 11:27 am

# CRM Application to Manage the Booking of Co-Living

## Reports

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Room Booking Report

Search...

★

+

📄

🔍

⚙️

🔔

👤

Report: Customers with Room Bookings and Total Rooms

Room Booking Report

Enable Field Editing

🔍

Add Chart

📄

Edit

Total Records

Total AC-3000

Total Amount

Total Advance Payment for 1 Month

5

5

₹1,54,000

5

| <input type="checkbox"/> Customer: Customer Name | Room Booking: Room No | Total No Of Rooms: Total No Of Rooms | Current Status | Phone no      | Email             | Permanent Address | AC-3000                             | Amount    | Advance Payment for 1 Month         |
|--|-----------------------|--------------------------------------|----------------|---------------|-------------------|-------------------|-------------------------------------|-----------|-------------------------------------|
| <input type="checkbox"/> gelli (2)               | RN-002                | 1                                    | Student        | 📞 08250572529 | 2105455@kit.ac.in | Patia             | <input checked="" type="checkbox"/> | ₹30,000   | <input checked="" type="checkbox"/> |
|  | RN-003                | 1                                    | Student        | 📞 08250572529 | 2105455@kit.ac.in | Patia             | <input checked="" type="checkbox"/> | ₹30,000   | <input checked="" type="checkbox"/> |
| Subtotal   |                       |                                      |                |               |                   |                   | 2                                   | ₹60,000   | 2                                   |
| <input type="checkbox"/> Michael (1)             | RN-005                | 1                                    | Employee       | 📞 1002554321  | mic@gmail.com     | Delhi, India      | <input checked="" type="checkbox"/> | ₹34,000   | <input checked="" type="checkbox"/> |
| Subtotal   |                       |                                      |                |               |                   |                   | 1                                   | ₹34,000   | 1                                   |
| <input type="checkbox"/> Sandeep (2)             | RN-001                | 2                                    | Employee       | 📞 8250572529  | 2105455@kit.ac.in | India             | <input checked="" type="checkbox"/> | ₹34,000   | <input checked="" type="checkbox"/> |
|  | RN-004                | 2                                    | Employee       | 📞 8250572529  | 2105455@kit.ac.in | India             | <input checked="" type="checkbox"/> | ₹26,000   | <input checked="" type="checkbox"/> |
| Subtotal   |                       |                                      |                |               |                   |                   | 2                                   | ₹60,000   | 2                                   |
| Total (5)  |                       |                                      |                |               |                   |                   | 5                                   | ₹1,54,000 | 5                                   |

Row Counts

Detail Rows

Subtotals

Grand Total

Co-Living

Customers

Room Bookings

Total Rooms

Payments

Food Selections

Feedbacks

Payment Status

Search...

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Report: Customers with Payments and Room Booking

Payment Status

Enable Field Editing

🔍

Add Chart

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Edit

Total Records

Total Amount

3

₹98,000.00

| <input type="checkbox"/> Customer: Customer Name | Payment: Payment No | Room Booking: Room No | Current Status | Phone no      | Email             | Amount     | Payment Mode |
|--|---------------------|-----------------------|----------------|---------------|-------------------|------------|--------------|
| <input type="checkbox"/> gelli (1)               | PNO-001             | RN-002                | Student        | 📞 08250572529 | 2105455@kit.ac.in | ₹30,000.00 | Check        |
| Subtotal   |                     |                       |                |               |                   | ₹30,000.00 |              |
| <input type="checkbox"/> Michael (1)             | PNO-003             | RN-005                | Employee       | 📞 1002554321  | mic@gmail.com     | ₹34,000.00 | Gpay         |
| Subtotal   |                     |                       |                |               |                   | ₹34,000.00 |              |
| <input type="checkbox"/> Sandeep (1)             | PNO-002             | RN-001                | Employee       | 📞 8250572529  | 2105455@kit.ac.in | ₹34,000.00 | Cash         |
| Subtotal   |                     |                       |                |               |                   | ₹34,000.00 |              |
| Total (3)  |                     |                       |                |               |                   | ₹98,000.00 |              |

Row Counts

Detail Rows

Subtotals

Grand Total

# CRM Application to Manage the Booking of Co-Living

## Dashboard

