TERRASTAY

Project Documentation: CRM Application for TerraStay

Category: Salesforce

Skills Required: Salesforce Developer

Project Overview

The **CRM Application for Room Booking** (named **Terrastay**) is designed to streamline the process of booking rooms for customers. The application leverages Salesforce's robust CRM capabilities to enhance customer interactions, optimize room management operations, and improve overall efficiency.

Key features of the application include:

- **Room Availability Management**: Automates room allocation and updates available rooms in real time.
- **Integration with Email Communication**: Enables seamless engagement with potential and existing customers via automated email workflows.
- **Custom Reports and Dashboards**: Provides insights into room occupancy, availability, and customer bookings.
- **User Profiles and Permissions**: Tailors user roles and permissions, such as the Booking Manager profile, for managing bookings effectively.
- **Room Available Trigger**, to keep room data accurate and up to date.
- Billing Process: Automates billing and payment processes for rentals.

- **User Roles and Profiles**: Defines different levels of access and roles, such as Owner and Agent, within the application.
- **Validation Rules:** Ensures the accuracy and completeness of critical data fields such as phone number and email.
- **Reports and Dashboards**: Provides actionable insights through reports and visual data dashboards

Detailed Setup Instructions

1. Creating Custom Objects

1. Navigate to Setup:

- Go to the Setup page in Salesforce and click on Object Manager
2. Create Custom Object:

Total Laptops
- Click on Create > Custom Object.
- Fill in the following details:
  - Label Name: Total Rooms
  - Plural Label Name: Total Rooms
  - Record Name Label: Total Rooms
  - Data Type: Text
- Enable the following options:
  - Allow Reports
  - Allow Search
  - Track Field History
- Click Save.
3. **Repeat the process** for the following custom objects:
- Consumer ∎ Room Booking ∎ Billing Process

Total Rooms Object:

SETUP > OBJECT MANAGER
Total Rooms

Details

Details   Edit   Delete

Description

API Name   Enable Reports
Total_Rooms__c   ✓
Custom   Track Activities
✓
Singular Label   Track Field History
Total Rooms   ✓
Plural Label   Deployment Status
Total Rooms   Deployed
                                                                 Help Settings
                                                                 Standard salesforce.com Help Window

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
Object Access
Triggers
Flow Triggers
Validation Rules

Consumer Object:

SETUP > OBJECT MANAGER
consumer

Details

Details   Edit   Delete

Description

API Name   Enable Reports
consumer__c   ✓
Custom   Track Activities
✓
Singular Label   Track Field History
consumer   ✓
Plural Label   Deployment Status
consumer   Deployed
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Room bookings Object:

Room Bookings

Details	Edit Delete

Details

Description

API Name
Room_Bookings__c

Custom
✓

Singular Label
Room Bookings

Plural Label
Room Bookings

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
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Validation Rules

Billing process Object:

Setup Home Object Manager ∨

Billing Process

Details   Edit Delete

Details

Description

API Name
Billing_Process__c

Custom
✓

Singular Label
Billing Process

Plural Label
Billing Process

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

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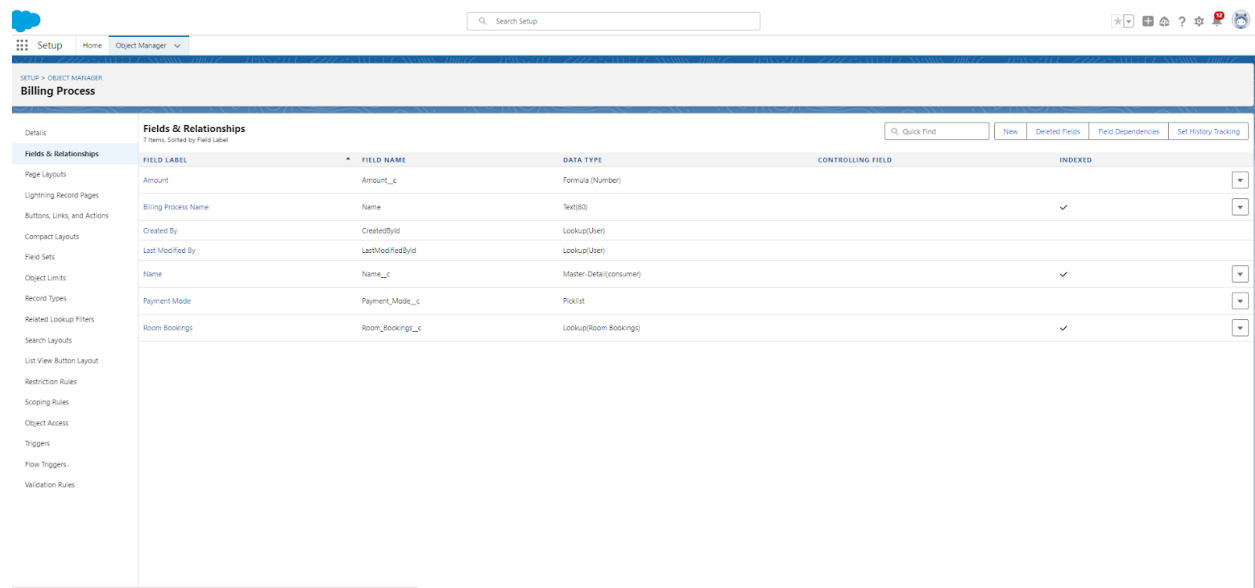Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules

2. Creating Tabs

1. Navigate to Setup:

- Type "Tabs" in the Quick Find bar and select Tabs.

2. Create a New Tab:

- Click on New under Custom Object Tabs.
- Select the custom object Total Rooms and choose a Tab Style.

■ Keep default settings and uncheck Include Tab in Custom App.

■ Click Save.

3. Repeat for the following objects:

■ Consumer

■ Room Bookings

■ Billing Process

Tabs:

3. Creating a Lightning App Page:

1. Navigate to App Manager:

■ Search for App Manager in the Quick Find bar.

2. Create a New Lightning App:

■ Click New Lightning App and name it Terrastay.

■ Add relevant Navigation Items such as Total Rooms, Consumer, Room Bookings, and Billing Process.

■ Add System Administrator to the User Profiles section.

■ Click Save & Finish.

App Navigation:

App user profiles:

4. Adding Fields to the Objects

Follow standard Salesforce procedures to add required fields to the following **objects:**

1. Total Rooms

2. Consumer

3. Room Bookings

4. Billing Process

# 5. Creating a Validation Rule

1. Navigate to Object Manager:

■ Go to the Setup page and select Object Manager.

2. Edit Consumer Object:

■ Choose the Consumer object and click Edit.

3. Create a Validation Rule:

■ Click on Validation Rules > New.

■ Enter the following details:

○ Rule Name: Phonenumberoremailblankrule

○ Description: Ensure that both phone number and email are not blank.

○ Formula: OR(ISBLANK(phone_number__c), ISBLANK(email__c))

■ Click Save.
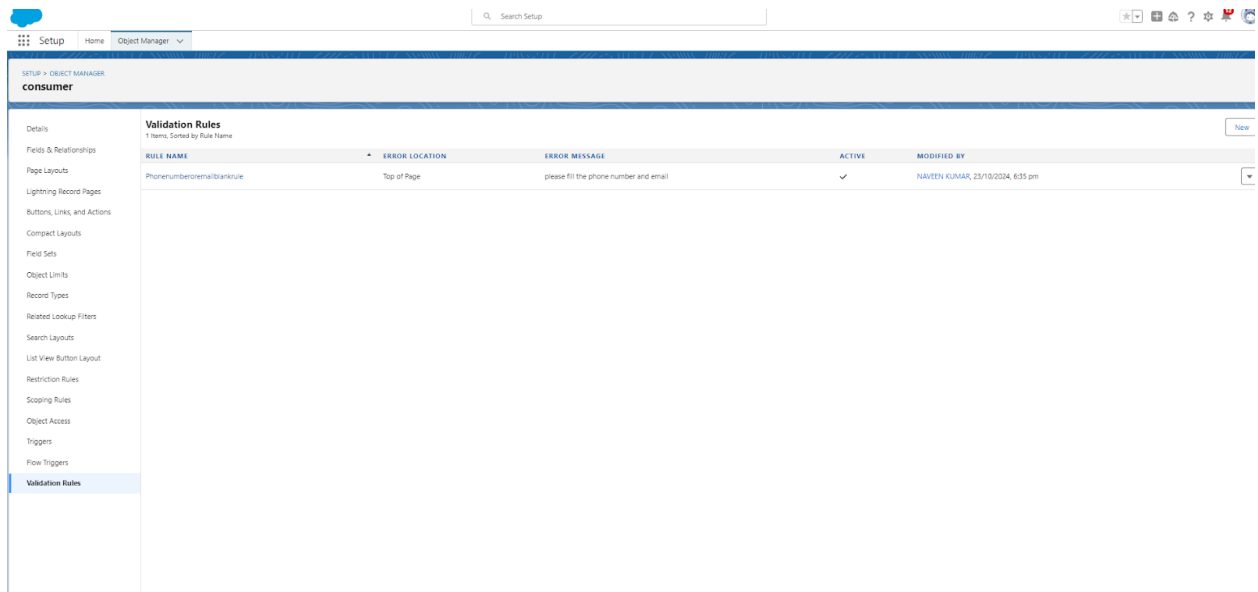
6. Creating Users Follow these steps to create users in Salesforce for the Room Rentals CRM:

1. Navigate to Users:

■ Go to Setup in Salesforce.

■ In the Quick Find box, type Users and select the Users option.

2. Create New User (Owner):

■ Click on **New User.**

■ Fill in the following details:

○ **First Name:** Naveen

○ **Last Name**: Kumar

○ **Alias:** [Alias Name]

○ **Email:** [Your Personal Email]

○ **Username**: text@text.text

○ **Nickname:** [Nickname]

 ○ **Role:** Owner

○ **User License:** Salesforce

○ **Profiles:** Owner

■ **Click Save.**

3. Create Another User (Agent):

■ **Click on New User again.**

■ **Fill in the following details:**

○ **First Name:** sai

○ **Last Name:** Kumar

○ **Alias:** [Alias Name]

○ **Email:** [Your Personal Email]

○ **Username:** text@text.text

○ **Nickname:** [Nickname]

○ **Role:** Agent

○ **User License:** Salesforce Platform

○ **Profiles:** Standard Platform User

■ **Click Save.**
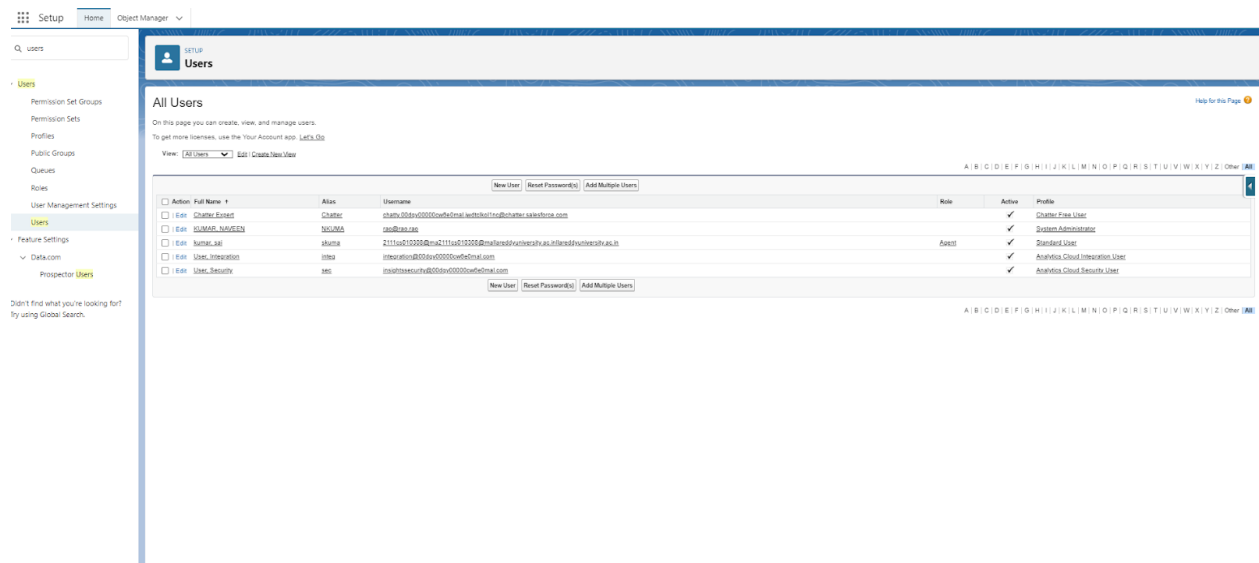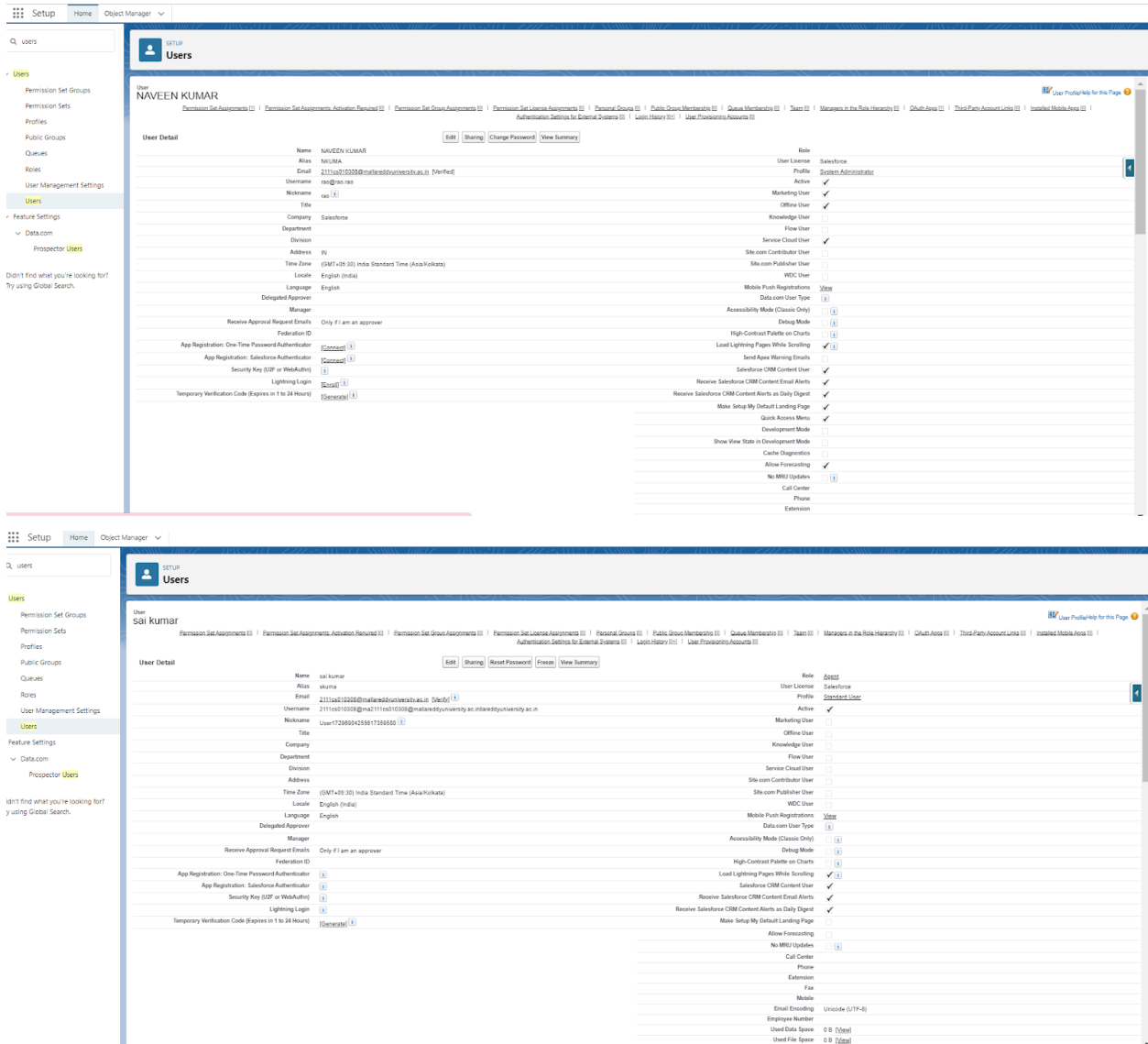
7. Creating a Flow for Room Distribution

To automate the laptop distribution process, follow these steps to create a Salesforce Flow that assigns Rooms to customers based on availability and booking details.

Steps to Create a Salesforce Flow for Room Distribution:

1. Navigate to Setup:

- In Salesforce, go to Setup and type Flows in the Quick Find bar.
- Select Flows from the dropdown menu.

2. Create a New Flow:

■ Click on New Flow and choose Record-Triggered Flow as the type of flow.

■ This type of flow will trigger automatically when a Room booking is created or updated.

3. Select the Trigger Object:

■ In the next step, choose the Room Bookings object as the trigger for the flow.

■ Set the trigger to fire when a record is created or updated.

4. Define Criteria:

■ Add a condition to check the availability of Room in the Total Rooms object.

■ The flow should only proceed if there are available Room that match the booking details, such as Room type and configuration.

5. Assignment Element:

■ Add an Assignment element to assign Room to customers.

■ The flow should retrieve available Room from the Total Rooms object and assign the first available one to the booking.

6. Update Records:

■ Add an Update Records element to update the booking with the assigned Rooms details.

■ Update the Room Booking record with the assigned Room ID, status (Booked), and any additional details.

7. Send Confirmation:

■ Optionally, add an email notification to confirm the booking and notify the customer. Use Email Alert or Apex Action to send emails.

8. Test the Flow:

■ Save and activate the flow.

■ Run tests to ensure that it correctly assigns Rooms based on availability and updates the booking records.

8. Developing Apex Code

To automate the business processes involved in Rooms bookings, such as updating Rooms availability and sending notifications, you need to create both an Apex class and an Apex trigger.

Apex Class:RoomBookingHandler

 The RoomBookingHandler class contains the business logic for handling

the key processes, including sending email notifications when a Room is booked.

9. Generating Reports and Dashboards

In Salesforce, **Reports** and **Dashboards** are powerful tools that allow you to visualize and analyze key metrics. Here's how you can generate reports and create a dashboard for the Room Rentals CRM application.(TerraStay)

Reports:

Dashboards:

Key Scenarios :

Lead and Reservation Management:
TerraStay can track potential customers who show interest in renting rooms, capturing their contact details, preferences, and initial inquiries. Leads can then be converted to reservations, ensuring a smooth handoff from inquiry to booking confirmation.

Customer Profile and Preference Tracking:
TerraStay can create detailed customer profiles with information on past rentals, preferences (e.g., room type, amenities, stay duration), and booking history.

Occupancy and Revenue Tracking:
TerraStay reporting capabilities enable you to analyze occupancy rates, track seasonal trends, monitor revenue per available room, and forecast demand. These insights can help optimize room pricing and promotional strategies to maximize revenue.

Seasonal and Group Booking Management:
TerraStay can streamline bookings for seasonal peak times and group reservations. For group rentals (such as corporate events or family gatherings), custom objects can track specific needs, block multiple rooms, and provide group discounts.

Conclusion:

An Overview Total (TERRASTAY CRM PROJECT)
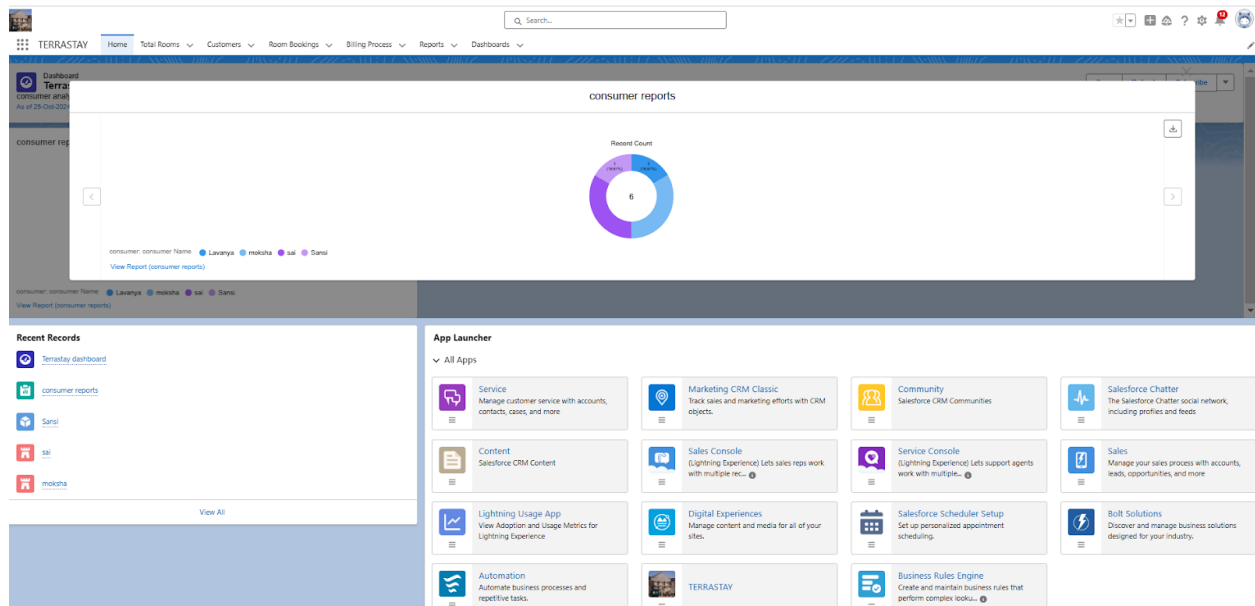
•The Terrastay CRM Application for room booking uses the potential of Salesforce in managing a successful CRM where in all the processes to room booking,customer interaction, and billing can be maintained on one central platform.

•Indeed its features such as real-time management of room availability, automated and user roles and permissions validate room management, enhance customer satisfaction, and optimize bookings.