

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

**Abstract:** Our co-living space project fosters an inclusive community where individuals can live, work, and connect. The space offers a balance of private and communal areas, encouraging collaboration and reducing isolation. The application allows users to select AC rooms with multiple sharing options, choose daily special food items, make payments through various modes, and provide feedback on services like room cleaning, internet connection, and food.

## Features and Functionality:

### 1. Customer Management

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

### 2. Room Booking

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

### 3. Food Services

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

#### **4. Payment Management**

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

#### **5. Feedback and Review**

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

#### **6. Reporting and Analytics**

- a. **Booking Reports:** The application will generate reports on room bookings, occupancy rates, and revenue.
- b. **Customer Insights:** The application will provide insights on customer behavior, preferences, and feedback.

#### **7. Security and Access Control**

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

#### **8. Functionality**

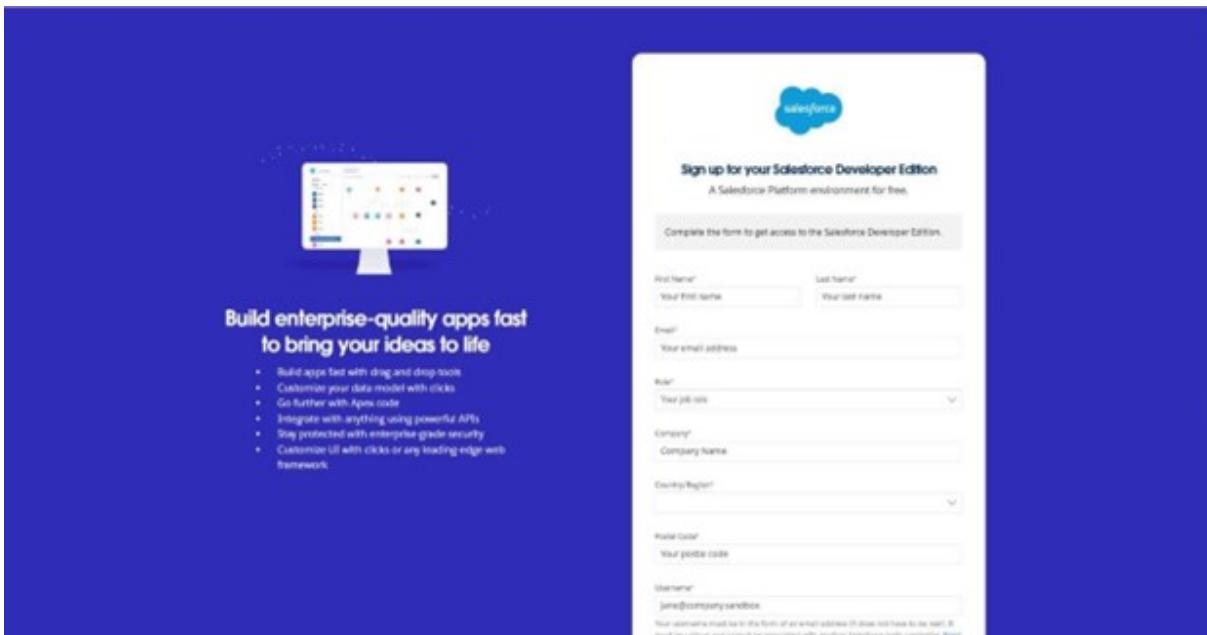
- a. **Search and Filter:** Users can search for available rooms by date, room type, and sharing options.
- b. **Booking Confirmation:** Once a booking is made, the user will receive a confirmation email with details of their booking.
- c. **Payment Reminders:** The application will send reminders to users for pending payments.
- d. **Feedback Notifications:** The application will send notifications to administrators when a user provides feedback.

- e. **Reporting and Analytics:** The application will generate reports and provide insights on customer behavior and preferences.

## Milestone 1 - Introduction to Salesforce: What is Salesforce?

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

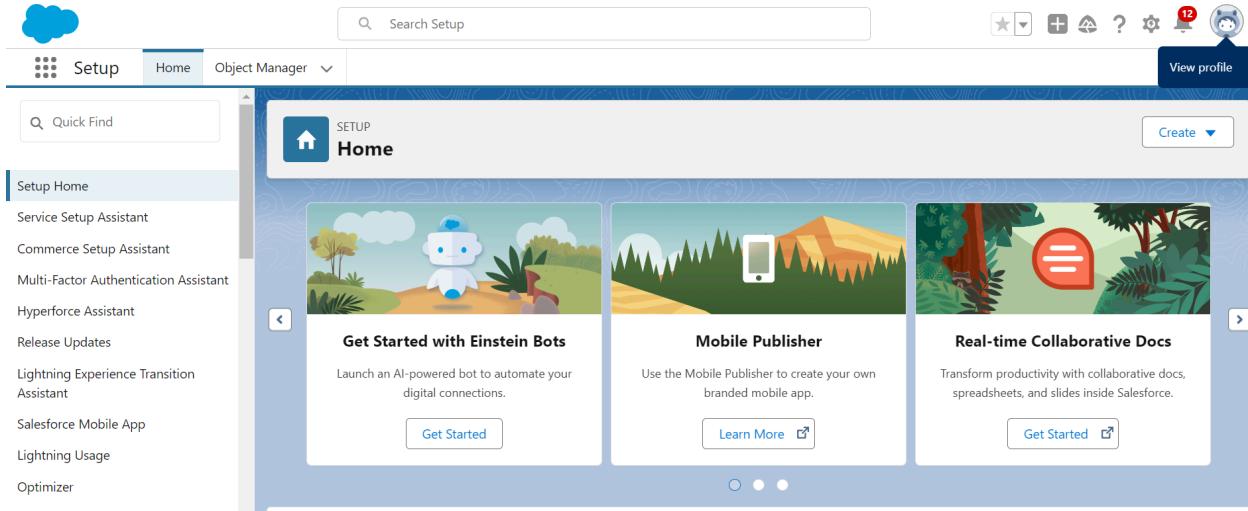
### Activity 1: Creating Developer Account:



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

## **Activity 2:Account Activation:**

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



## **Milestone 2 – Object**

### **What Is an Object?**

Salesforce objects are database tables that permit you to store data that is specific to an organization.

### **What are the types of Salesforce objects?**

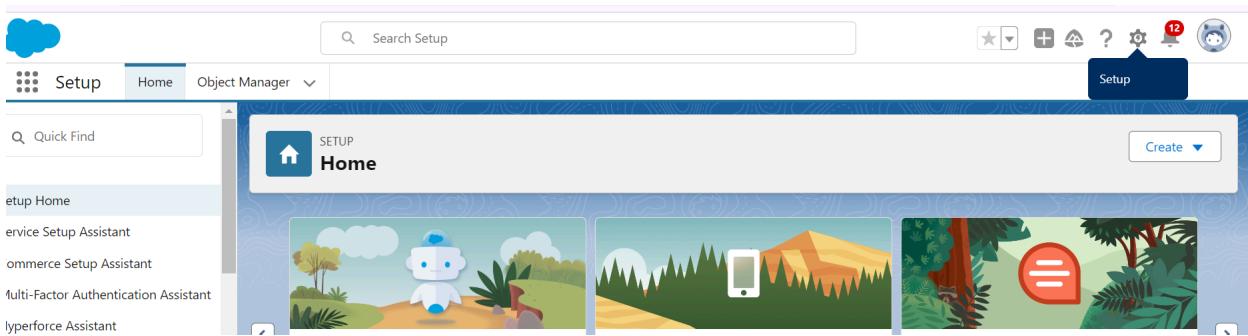
#### **Salesforce objects are of two types:**

**Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

**Custom Objects:** Custom objects are objects created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a data-sharing structure.

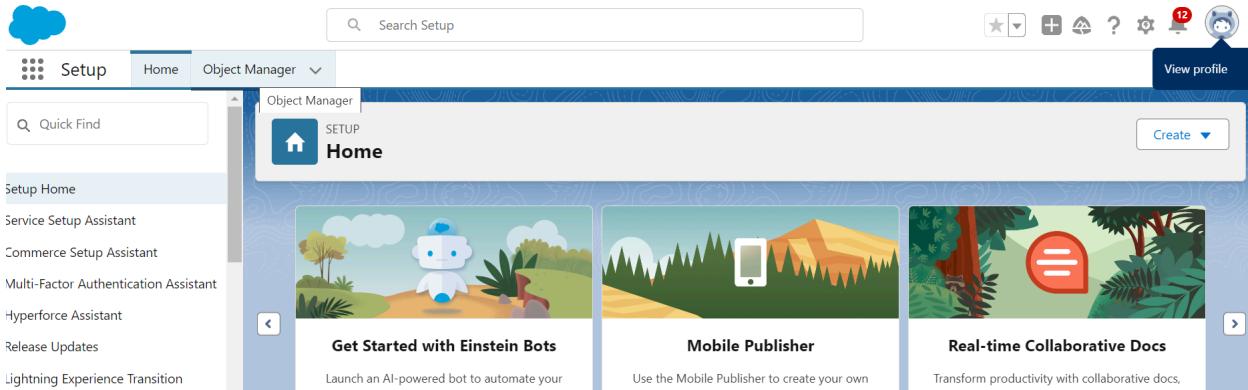
#### **To Navigate to Setup page:**

Click on gear icon ? click setup.



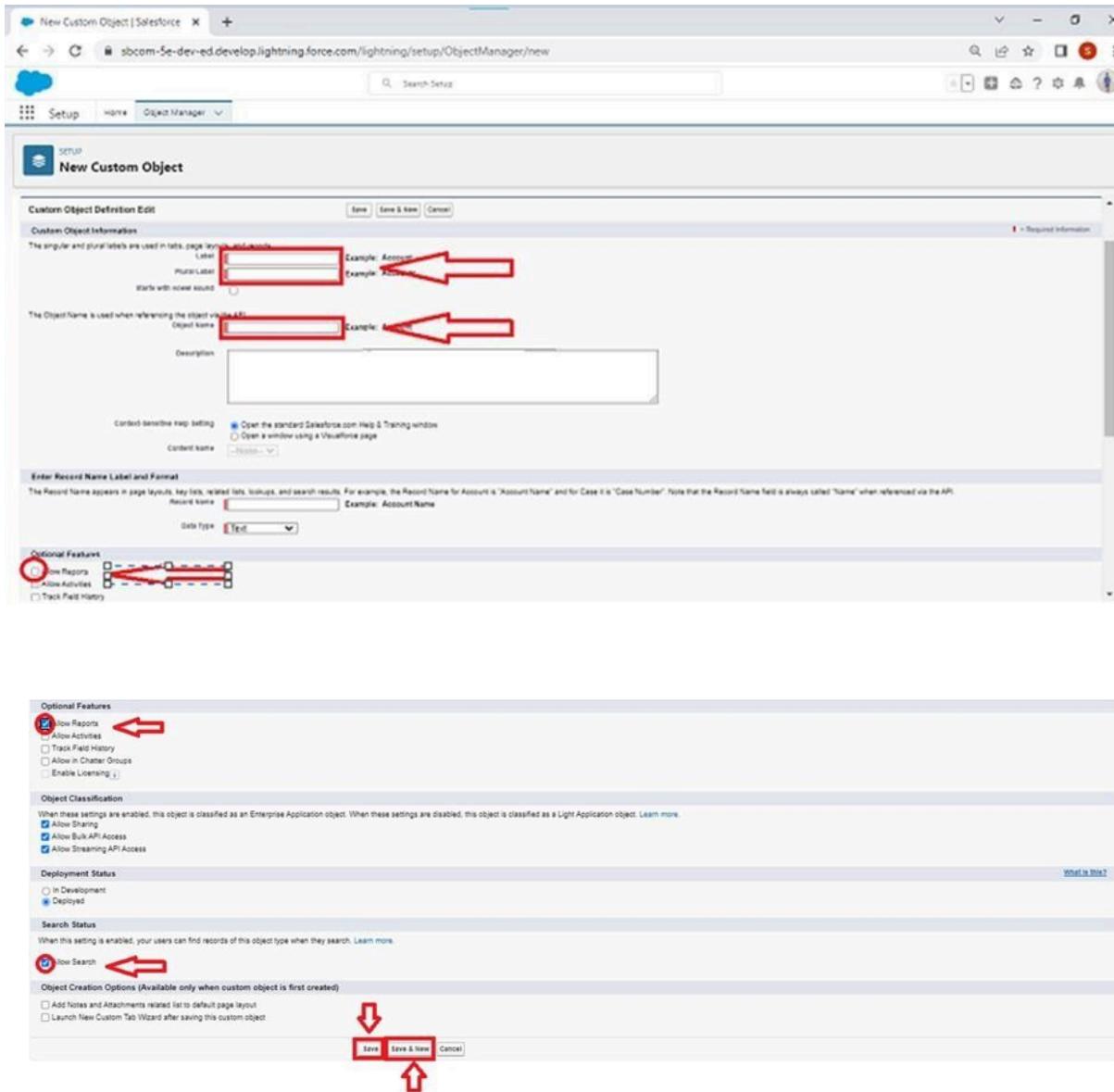
## To create an object:

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



## On the Customobject defining page:

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



Click on Save.

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

To create an object:

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

1. Enter the label name Supplier
2. Plural label name? Suppliers
3. Fill in the label as "TotalRoom".
4. Fill in the plural label as "TotalRooms".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

**Custom Object Definition Edit**

**Custom Object Information**

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

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

Starts with vowel sound

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

Object Name	Total_Rooms	Example: Account	2
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Description

Context Sensitive Help Setting

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

Content Name

Enter Record Name Label and Format

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

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

Leave everything else as is, and click Save.

## Create a custom object for Customer

The screenshot shows the Salesforce Setup interface under the Object Manager tab. A sidebar on the left lists various configuration options like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main area is titled "Customer1" and contains a "Details" section. The "Description" field is empty. The "API Name" field is set to "Customer1\_\_c". Under the "Custom" section, the "Singular Label" is "Customer1" and the "Plural Label" is "Customers". On the right, there are checkboxes for "Enable Reports" (checked), "Track Activities" (unchecked), "Track Field History" (checked), and "Deployment Status" (set to "Deployed"). "Help Settings" and "Standard salesforce.com Help Window" are also listed. At the bottom right are "Edit" and "Delete" buttons.

## Create a custom object for Room Booking

The screenshot shows the Salesforce Setup interface under the Object Manager tab. The sidebar and main area are similar to the previous screenshot, but the object name is "Room Booking". The "Details" section shows the "API Name" as "Room\_Booking\_\_c", the "Singular Label" as "Room Booking", and the "Plural Label" as "Room Bookings". The configuration options on the right are identical to the Customer1 setup, including checked boxes for Enable Reports and Track Field History, and deployment status set to Deployed.

## Create a custom object for Payment

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Payment1'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The right panel displays the 'Details' section for the 'Payment1' object. It contains fields for Description, API Name (Payment1\_\_c), Singular Label (Payment1), Plural Label (Payments), and several checkboxes for system settings like Enable Reports, Track Activities, and Track Field History. The 'Edit' and 'Delete' buttons are located at the bottom right of the details panel.

## Create a customobject for Food Selection

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Food Selection'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The right panel displays the 'Details' section for the 'Food Selection' object. It contains fields for Description, API Name (Food\_Selection\_\_c), Singular Label (Food Selection), Plural Label (Food Selections), and several checkboxes for system settings like Enable Reports, Track Activities, and Track Field History. The 'Edit' and 'Delete' buttons are located at the bottom right of the details panel.

## Create a customobject for Feedback

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with icons for Home, Object Manager, and a search bar labeled 'Search Setup'. Below the navigation is a header bar with a cloud icon, 'Setup', and other navigation links. The main content area is titled 'SETUP > OBJECT MANAGER' and shows 'Feedback' selected. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main panel displays the 'Details' tab for the 'Feedback' object. It includes fields for API Name ('Feedback\_\_c'), Singular Label ('Feedback'), Plural Label ('Feedbacks'), and several checkboxes for reports, activities, field history, and deployment status. At the bottom right of the main panel are 'Edit' and 'Delete' buttons.

## Milestone 3 - Tabs

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

### Types of Tabs:

#### Custom Tabs :

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

#### Web Tabs :

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

#### Visualforce Tabs :

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

#### Lightning Component Tabs :

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

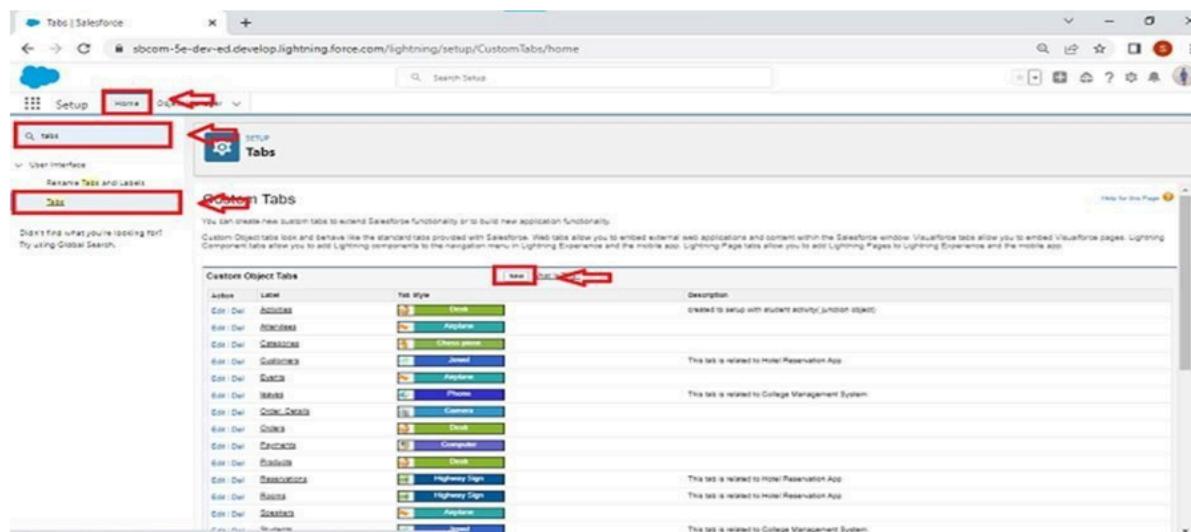
## Lightning Page Tabs :

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

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

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

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



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

The screenshot displays the Salesforce Setup interface for creating a new custom object tab. On the left, the 'New Custom Object Tab' form is shown with the following fields:

- Step 1. Enter the Details:** Choose the custom object for the new custom tab (Object: Total Room).
- Tab Style:** Set to 'Keys' (highlighted with a red arrow).
- (Optional) Choose a Home Page Custom Link:** None.
- Description:** An empty text input field.

On the right, a 'Tab Style Selector' dialog box is open, showing a grid of icons for different tab styles. The 'Keys' style is selected.

3. Next (Add to profilespage) keep it as default
4. Next (Add to CustomApp) keep it as default& Save.

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

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

## To create a Tab for Room Bookings

To create a Tab:(Room Bookings)

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

## Create a Tabs For Remaining Objects

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

## Milestone 4 - The LightningApp

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightningapps give your users access to sets of objects,tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

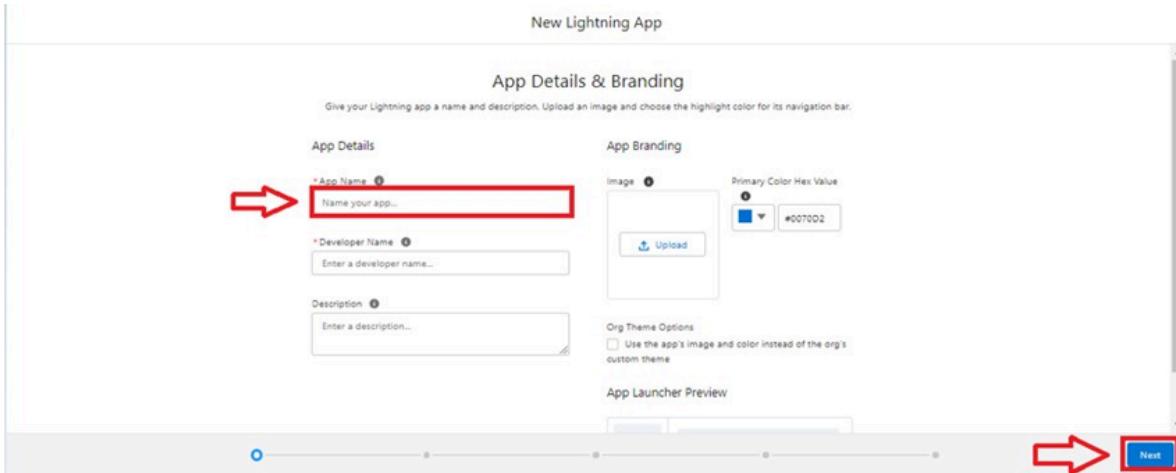
### Activity 1: To create a lightningapp page:

Go to setup page > search “app manager” in quick find > select “app manager” > click on NewlightningApp.

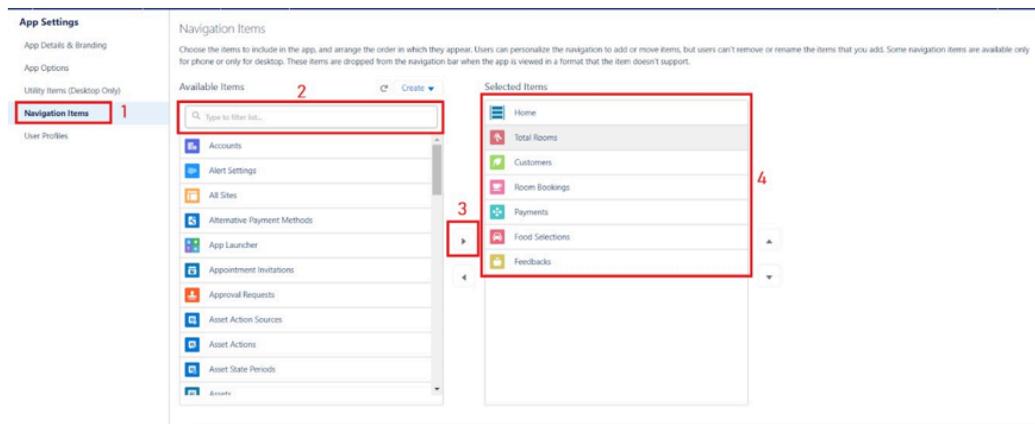
The screenshot shows the Salesforce App Manager interface. At the top, there are several tabs: Setup, Home, Object Manager, and a search bar. Below the tabs, there are three red boxes highlighting specific areas: 'CL App manager' (under Setup), 'App' (under Home), and 'New Connected App' (under Object Manager). The main content area is titled 'Lightning Experience App Manager' and contains a sub-section 'Clone Apps(Beta)'. A red arrow points to the 'New lightning App' button. Below this, there is a note about cloning existing apps and enabling app cloning. The bottom half of the screen displays a table of existing apps, with a red arrow pointing to the 'New lightning App' button at the top right of the table header. The table columns are: App Name, Developer Name, Description, Last Modified, App Type, and VLS. The table lists 35 items, including 'All Tasks', 'Analytics Studio', 'App Launcher', 'Bart Solutions', 'Chatter Desktop', 'Chatter Mobile for BlackBerry', 'College Management System', 'Community', 'Content', and 'Data Manager'.

App Name	Developer Name	Description	Last Modified	App Type	VLS
All Tasks	AlTask	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
App Launcher	AppLauncher	App Launcher fast	04/12/2022, 10:13 am	Classic	✓
Bart Solutions	LightningBart	Discover and manage business solutions designed for your industry	04/12/2022, 10:18 am	Lightning	✓
Chatter Desktop	Chatter_Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected to their social network from their desktop computer	28/12/2022, 4:04 pm	Connected (Managed)	✓
Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed, comment, and share	28/12/2022, 4:05 pm	Connected (Managed)	✓
College Management System	hassan	demo app	08/12/2022, 4:19 pm	Lightning	✓
Community	Salesforce CRM Community	Salesforce CRM Community	04/12/2022, 10:13 am	Classic	✓
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage records	04/12/2022, 10:13 am	Lightning	✓

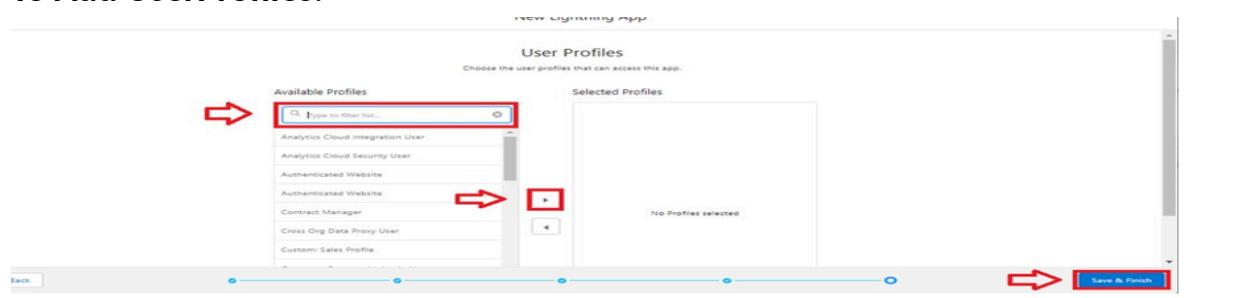
2.Fill the app name in app details and branding > Next > (App option page)keep it as default> Next> (Utility Items) keep it as default > Next.



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.



## To Add UserProfiles:



5. Search profiles (System administrator) in the searchbar > click on the arrow button > save & finish.

## Milestone 5 – Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records becomes simpler and quicker.

### Types of Fields

#### 1.Standard Fields

#### 2.Custom Fields

##### **Standard Fields:**

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

? CreatedBy

? Owner

? Last Modified

? FieldMade During objectCreation

##### **Custom Fields:**

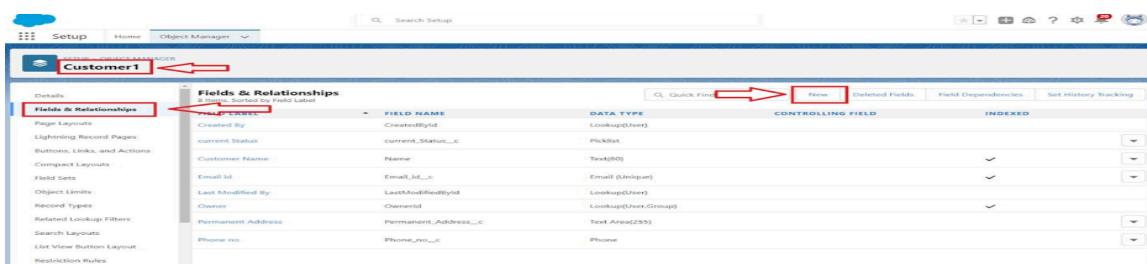
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organization or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

## Activity 1: Creation of fields for the customer1 object

### To create fields in an object:

1.Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.

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



### 3. Select Data Type as a “Phone”

The screenshot shows the 'Customer1' object setup page in Salesforce. Under the 'Fields & Relationships' tab, a list of field types is displayed. The 'Phone' option is highlighted with a red arrow pointing to it.

Field Type	Description
Currency	Allows users to enter a local or other currency amount and automatically formats the field as a currency amount. This can be useful if you import data to Excel or another spreadsheet.
Date	Allows users to enter a date or pick a date from a pop-up calendar.
DateTime	Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
<b>Phone</b>	Allows users to enter any phone number. Automatically formats it as a phone number. <b>Red arrow points here.</b>
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

### 4. Click on next

The screenshot shows the 'Edit Customer1 Custom Field' page. The 'Field Information' section is displayed, with the 'Field Label' set to 'Phone no' and the 'Field Name' set to 'Phone\_no'. The 'Data Type' is selected as 'Phone'. The 'Save' button at the bottom right is highlighted with a red arrow.

### 5. Fill the Above as following:

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

### 2. To create another fieldsin an object:

1.Go to setup > click on Object Manager> type objectname(Customer1) in searchbar > clickon the object.

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

3.Select Data type asa “Email” and Click on Next

4.Fillthe Above as following:

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

### **3. To create another fields in an object:**

1.Go to setup > click on Object Manager> type objectname(Customer1) in searchbar > clickon the object.

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

3.Select Data type as a “Text Area” and Click on Next

4.Fillthe Above as following:

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

### **4. To create another fields in an object:**

1.Go to setup > click on Object Manager> type objectname(Customer1) in searchbar > clickon the object.

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

3.Select Data type as a “Picklist” and Click on Next

4.Fill the Above as following: Field Label: CurrentStatus

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

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

## **Creation of fields for the Room Bookingobject**

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

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

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

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Room Booking' object name in the top navigation bar. Another red box highlights the 'Fields & Relationships' tab in the left sidebar. A third red box highlights the 'New' button at the top right of the main content area. The main content displays a table of existing fields for the Room Booking object, with columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table includes fields like 'AC - 3000', 'Advance payment for 1month', 'Amount', 'Created By', 'Last Modified By', 'Name', and 'Room No'. The 'DATA TYPE' column shows various types such as Checkbox, Currency(18, 0), and Master-Detail(Customer1). The 'CONTROLLING FIELD' and 'INDEXED' columns contain dropdown menus.

3.Select Data Type as a “Picklist”

4.Click on Next

The screenshot shows the 'Step 2. Enter the details' page for creating a new field. The 'Field Label' is set to 'Room Sharing' (1). The 'Values' section is expanded, showing three options: 'Single sharing', 'Double sharing', and 'Triple sharing'. A red box highlights this section. Below it, the 'Field Name' is 'Room\_Sharing' (2), and the 'Required' checkbox is checked (3). Other settings like 'Default Value' and 'Restrict picklist to the values defined in the value set' are also visible.

5.Fill the Above as following:

Field Label:Room Sharing

Value - Select entervalues with each value separated by a new line

Single sharing

Double sharing

Triple sharing

Select required

Click on Next > Next > Save and new.

## 2. To Create a Fields & Relationship to an Room Booking Object

To create fields & relationship to an object:

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

click on the object.

The screenshot shows the 'Object Manager' screen with the 'Room Booking' object selected (1). The status bar at the bottom right shows the date '07/06/2023'. A red arrow points to the 'Room Booking' row in the list.

Object	Object API Name	Type	Status
Resource Absence	ResourceAbsence	Standard Object	
Resource Preference	ResourcePreference	Standard Object	
Return Order	ReturnOrder	Standard Object	
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object	
Return Order Item Tax	ReturnOrderItemTax	Standard Object	
Return Order Line Item	ReturnOrderLineItem	Standard Object	
Room Booking	Room_Booking__c	Custom Object	07/06/2023
Scorecard	Scorecard	Standard Object	
Scorecard Association	ScorecardAssociation	Standard Object	
Scorecard Metric	ScorecardMetric	Standard Object	
Seller	Seller	Standard Object	
Service Appointment	ServiceAppointment	Standard Object	

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

The screenshot shows the Salesforce Setup interface for the 'Room Booking' object. The 'Fields & Relationships' tab is selected. A red box highlights the 'New' button at the top right of the list view. Another red box highlights the 'Fields & Relationships' tab in the left sidebar.

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

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

### 4. Click on Next

The screenshot shows the 'Data Type' configuration step. The 'Master-Detail Relationship' option is selected. A red box highlights the 'Master-Detail Relationship' section, and another red arrow points to the 'Next' button at the top right.

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

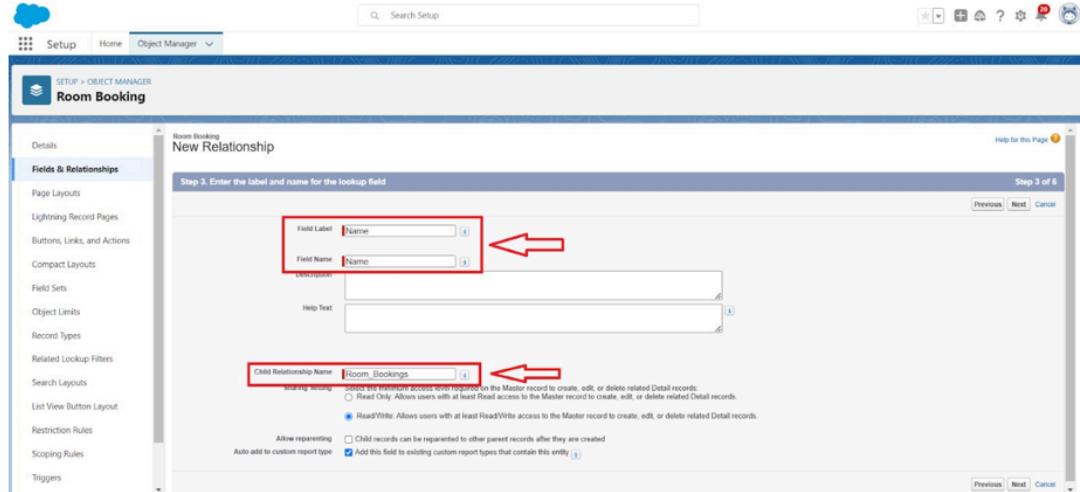
The screenshot shows the 'New Relationship' configuration step. The 'Related To' dropdown is open, showing a list of objects. 'Customer1' is highlighted with a red box. A red arrow points to the 'Customer1' entry in the dropdown list.

6.Fill the Above as following:

Change the Field Label: Name

Field Name : It's gets auto generated

- Field Name ; it's gets auto generated



Click on Next > Next > Save and new.

### 3. To create fields in an object:

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

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

3.Select Data Type as a “Checkbox”

4.Click on Next

5.Fillthe Above as following:

Field Label: AC-3000

Field Name :It's gets auto generated

Click on Next > Next > Save and new

### 4. To create fields in an object:

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

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

3.Select Data Type as a “Checkbox”

4.Click on Next

5.Fillthe Above as following:

Field Label: Advance Paymentfor 1 Month

Field Name :It's gets auto generated

Click on Next > Next > Save and new

## **5. To create fields in an object:**

1. Goto setup ? click on Object Manager ? type object name(Room Booking) in the search bar ? click on the object.

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

.Select Data Type as a “Currency”

4. Click on Next

Fill the Above as following:

Field Label: Amount

Length: (18,0)

Field Name : It's gets auto generated

Click on Next > Next > Save and new

## **6. To Create a Fields & Relationship to an Object**

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

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

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

4. Click on Next

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

Fill the Above as following:

Change the Field Label: Total No Of Rooms

Field Name : It's gets auto generated

Click on Next > Next > Save and new.

## **7. To Create a Rollup Summary Field in “Total Room Object”**

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

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

3. Now click on “Fields & Relationships” ? New

.Select Data type as a “Roll-up Summary” and Click on Next

5. Fill the Above as following:

Field Label: Rooms Booked

Field Name : It's gets auto generated

Click on Next

5. Select the Room Bookings in the Summarized Object

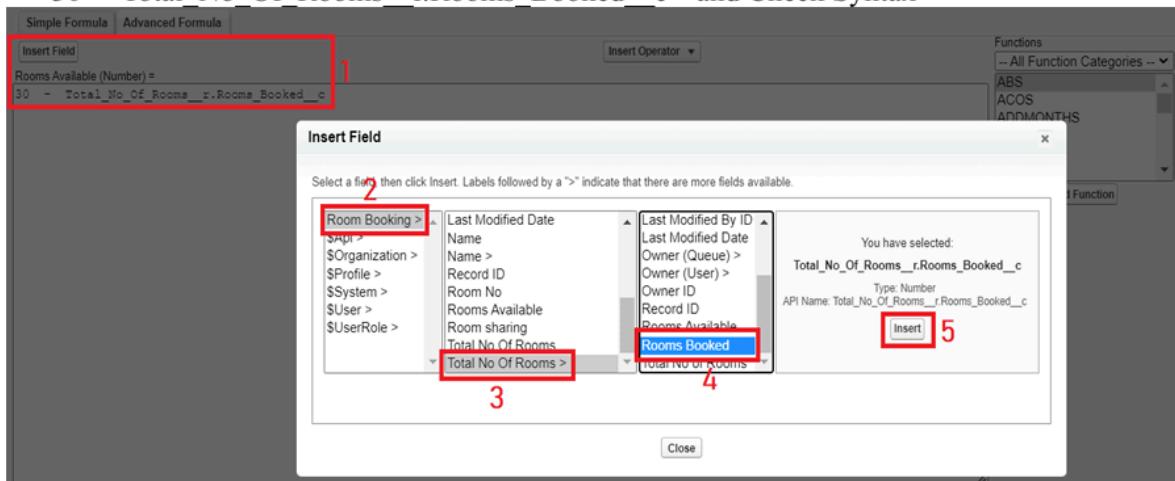
6. Select the count Radio button in the select Roll-up Type

7. Click on Next > Next > Save and new

## **To create fields in an object:**

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

- 1.click on the object.
- 2.Now click on “Fields &Relationships” > New
- 3.Select Data type asa “Formula” and Click on Next
- 4.Fill the Above as following:  
 FieldLabel:Rooms Available  
 Field Name : It's gets auto generated  
 Select the Formula Return Type as “Number”  
 Select the Decimal placesas “0” and Click on Next  
 Click on the Advanced Formula and Enter the value in formula box “ 30 - ” and Click on insert field than you will find a pop window under the Room Booking select the Total No Of Rooms in the second Column and select the Room Booked in the third column and click on insert “  
 30- Total\_No\_of\_Rooms r.Rooms\_Booked\_c” and Check Syntax  
 30 - Total\_No\_of\_Rooms r.Rooms\_Booked\_c and Check Syntax



Click on Next > Next > Save and new.

## 9. To create fields in an object:

- 1.Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.
- 2.Now click on “Fields &Relationships” > New
- 3.Select Data Type as a “Checkbox”
- 4.Click on Next
- 5.Fillthe Above as following:

Field Label:Check ins

Field Name :It's gets auto generated

Click on Next > Next > Save and new

## 10. To create fieldsin an object:

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

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

3.Select Data Type as a “Checkbox”

4.Click on Next

Fillthe Above as following:

Field Label: Check Out

Field Name :It's gets auto generated

Click on Next > Next > Save and new

## Creation of Fields & Relationship for Payment1 Object

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

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

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

The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon followed by 'Setup', 'Home', and 'Object Manager'. Below this, the title 'SETUP > OBJECT MANAGER' and the object name 'Payment1' are displayed. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. A red box highlights the 'Fields & Relationships' link under the 'Details' section. In the main area, a table titled 'Fields & Relationships' shows several fields: Amount, Created By, Last Modified By, Name, Payment ID, Payment Mode, Payment no, and Room Booking. The 'FIELD LABEL' column shows the internal field names. The 'DATA TYPE' column includes 'Formula (Currency)', 'Lookup(User)', 'Master-Detail(Customer)', 'Number(18, 0)', 'Picklist', 'Auto Number', and 'Lookup(Room Booking)'. The 'CONTROLLING FIELD' and 'INDEXED' columns show checkboxes. At the top right of the table, there are buttons for 'Quick Find', 'New' (highlighted with a red box), 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. A red arrow points to the 'New' button.

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

This screenshot shows the 'Fields & Relationships' configuration screen for the Payment1 object. The top navigation bar is identical to the previous screenshot. The sidebar on the left has a red box around the 'Fields & Relationships' link. The main area starts with a section 'Specify the type of information that the custom field will contain.' It asks to select a 'Data Type'. Under 'Data Type', there are several options: 'None Selected', 'Auto Number', 'Formula', 'Lookup Relationship', and 'Master-Detail Relationship'. The 'Master-Detail Relationship' option is highlighted with a red box. A detailed description of this type is provided: 'Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.' Below this, there are three other data type options: 'External Lookup Relationship', 'Checkbox', 'Currency', and 'Date'. A red arrow points to the 'Master-Detail Relationship' section.

4.Click on Next

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

The image consists of two screenshots of the Salesforce Setup interface, both titled "Payment1".

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

This screen shows a dropdown menu labeled "Related To" with the value "None" selected. A red box highlights this dropdown, and a red arrow points to it from the left.

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

This screen shows several input fields:

- "Field Label": "Name" (highlighted with a red box and a red arrow pointing to it from the left)
- "Field Name": "Name" (highlighted with a red box and a red arrow pointing to it from the left)
- "Child Relationship Name": "Payments1" (highlighted with a red box and a red arrow pointing to it from the left)

6.Fill the Above as following:

Change the Field Label:Name

Field Name :It's gets auto generated

Click on Next > Next > Save and new.

## 2. To create another fields & relationship to an object:

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

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

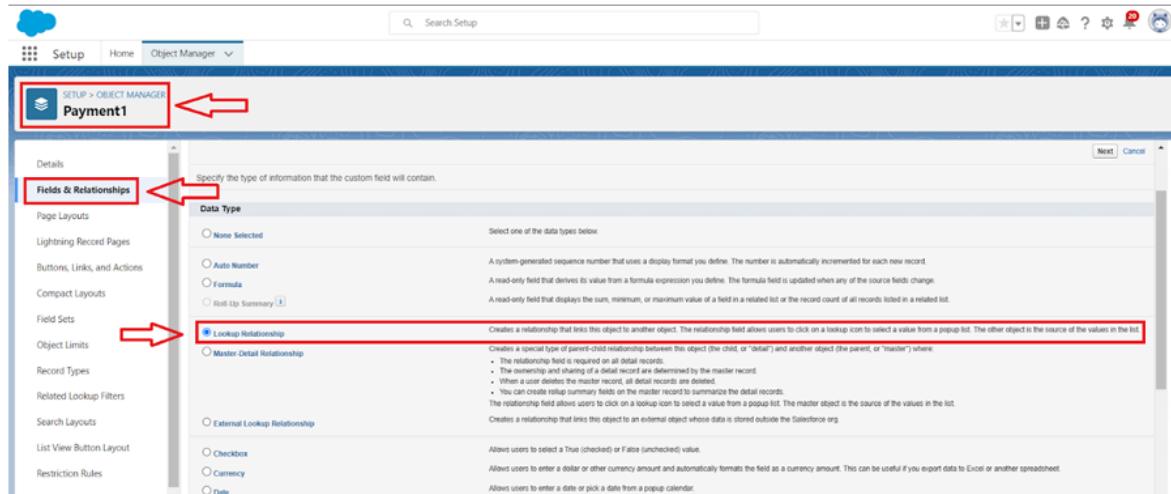
This screenshot shows the "Fields & Relationships" page for the "Payment1" object. The "Fields & Relationships" tab is highlighted with a red box and a red arrow pointing to it from the left.

The main table displays various fields with their details:

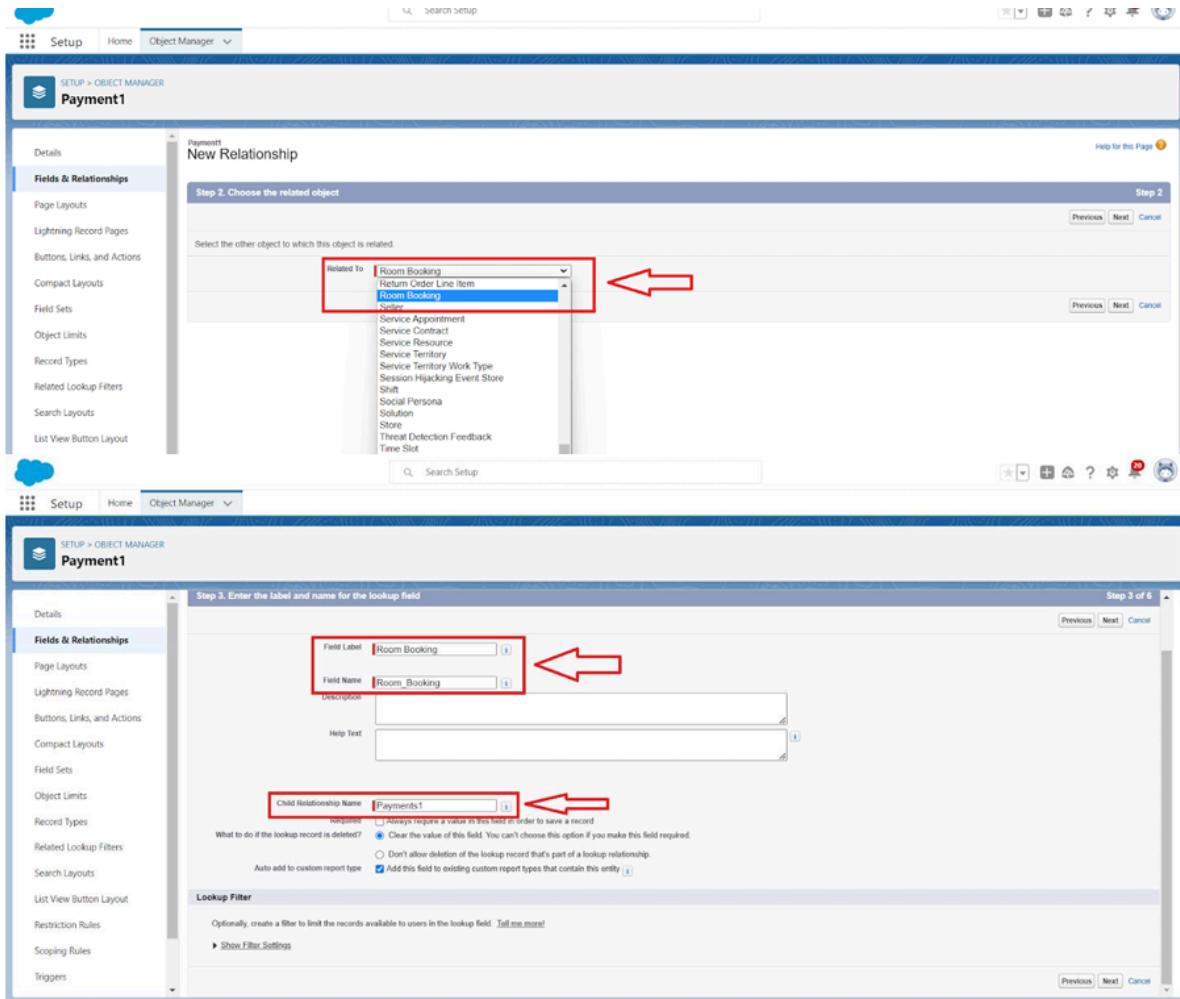
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Master-Detail(Customer1)		
Payment ID	Payment_ID_c	Number(18, 0)		
Payment Mode	Payment_Mode_c	Picklist		
Payment no	Name	Auto Number		
Room Booking	Room_Booking_c	Lookup(Room Booking)		

3.Select Data Type as a “LookupRelationship”

4.Clickon Next



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



### 3. Creation of another fields for the Payment1 object

To create fields in an object:

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

**SETUP > OBJECT MANAGER**

**Payment**

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)		
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number		
Room Booking	Room_Booking__c	Lookup(Room Booking)		

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

**SETUP > OBJECT MANAGER**

**Payment**

**Fields & Relationships**

- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)
- Time

Allows users to select a value from a list you define.

## Fill the Above as following:

Field Label:Payment Mode

Value - Select entervalues with each value separated by a new line

Cash

Check

Credit card

Debitcard

UPI

Phonepe

Gpay

Paytm

Select require

## Cross ObjectFormula Field:

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

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

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

## 4. Create a Cross objectformula Field in Payment1Object

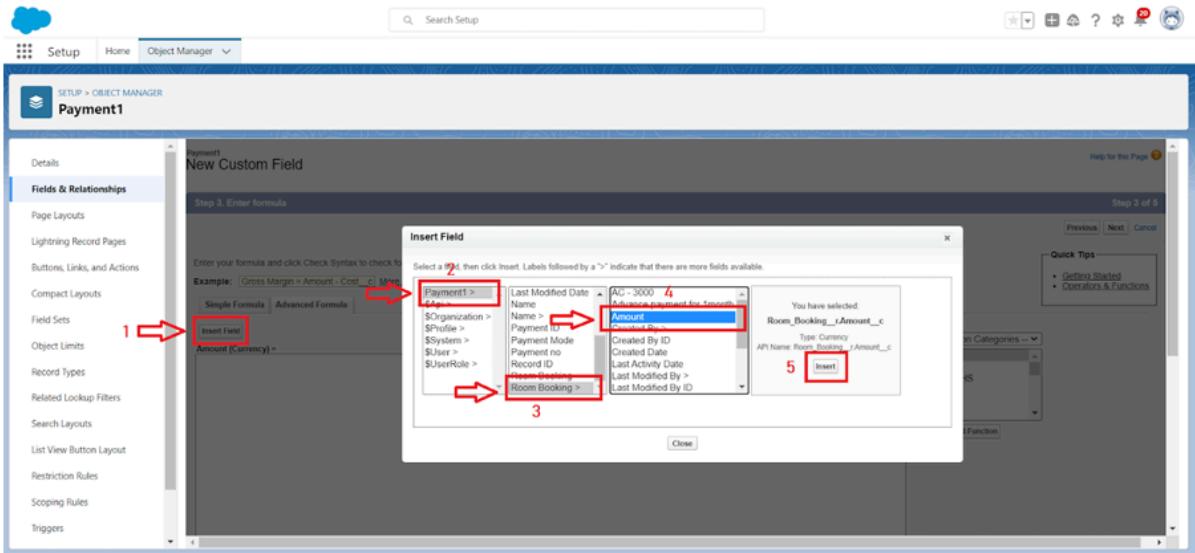
- 1.Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
- 2.Now click on “Fields& Relationships” > New

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A red box highlights the 'Object Manager' tab. Below the navigation is a search bar labeled 'Search Setup'. The main area displays the 'Fields & Relationships' section for the 'Payment1' object. A red box highlights the 'Fields & Relationships' link in the left sidebar. Another red box highlights the 'New' button at the top right of the table header. The table lists various fields with their labels, field names, data types, controlling fields, and indexing status. Fields include 'Amount', 'Created By', 'Last Modified By', 'Name', 'Payment ID', 'Payment Mode', 'Payment no', and 'Room Booking'.

- 3.Select Data Type as a “Formula”

- 4.Click on Next

The screenshot shows the 'Create Custom Field' wizard, Step 2: Fields & Relationships. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A red box highlights the 'Object Manager' tab. The left sidebar shows 'Fields & Relationships' selected. The main area asks 'What type of information that the custom field will contain?'. It shows 'Data Type' set to 'Formula'. A red box highlights the 'Formula' option. Below it, 'Field Label' is set to 'Total Amount'. A red box highlights the 'Next Step' button at the bottom right.



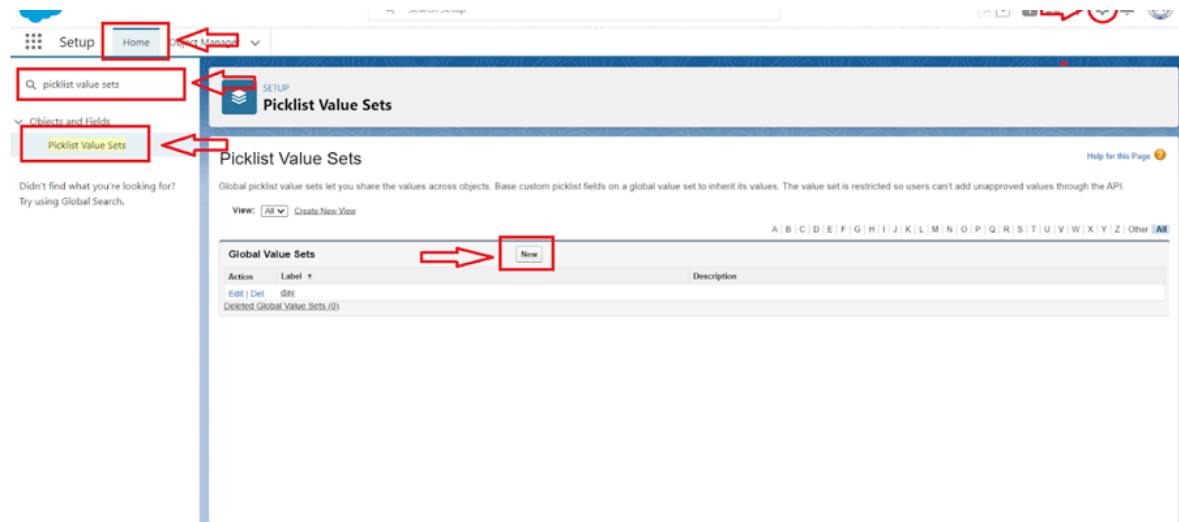
7. Click on the Check syntax: No syntax errors in merge fields
8. Click on Next > Next > Save and new.

### Picklist value sets:

Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

### Create a picklist value set:

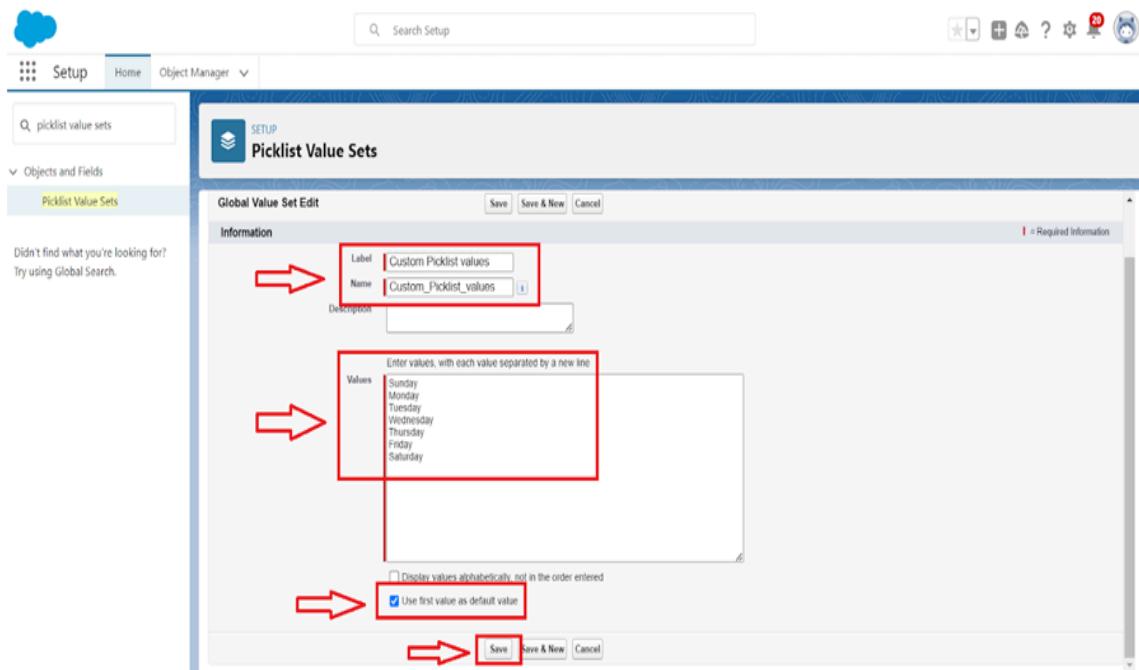
1. First click on gear icon and click on setup
2. Click on home tab in the Quick find box search for the “ Picklist value sets ”
3. Click on the Picklist value set and click on new



4. Enter the Label name and API name automatically generate

5.Enter the values with each value separated by a new line

Sunday  
Monday  
Tuesday  
Wednesday  
Thursday  
Friday  
Saturday



### Field Dependency:

Field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by the value selected in a controlling picklist.

The screenshot shows the Salesforce Object Manager page. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Food Selection' row in the main list, which is also underlined. A red arrow points from the left towards the 'Food Selection' row.

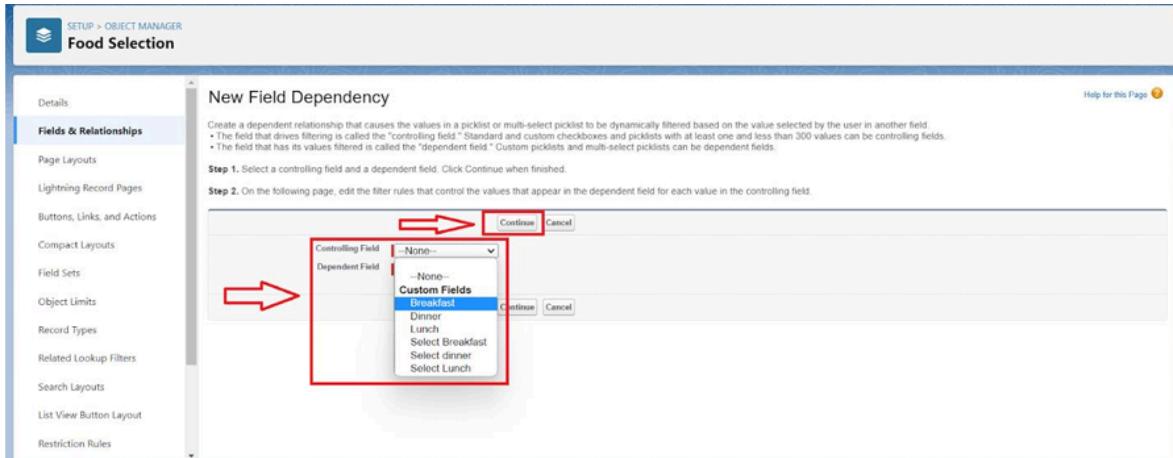
## 2. Now Click on fields & relationships and Click on Field Dependencies

The screenshot shows the 'Fields & Relationships' page for the 'Food Selection' object. A red box highlights the 'Food Selection' tab in the top navigation bar. Another red box highlights the 'Fields & Relationships' link in the sidebar. A red arrow points from the left towards the 'Fields & Relationships' link. On the right, a red box highlights the 'Field Dependencies' button in the top right corner of the main grid area.

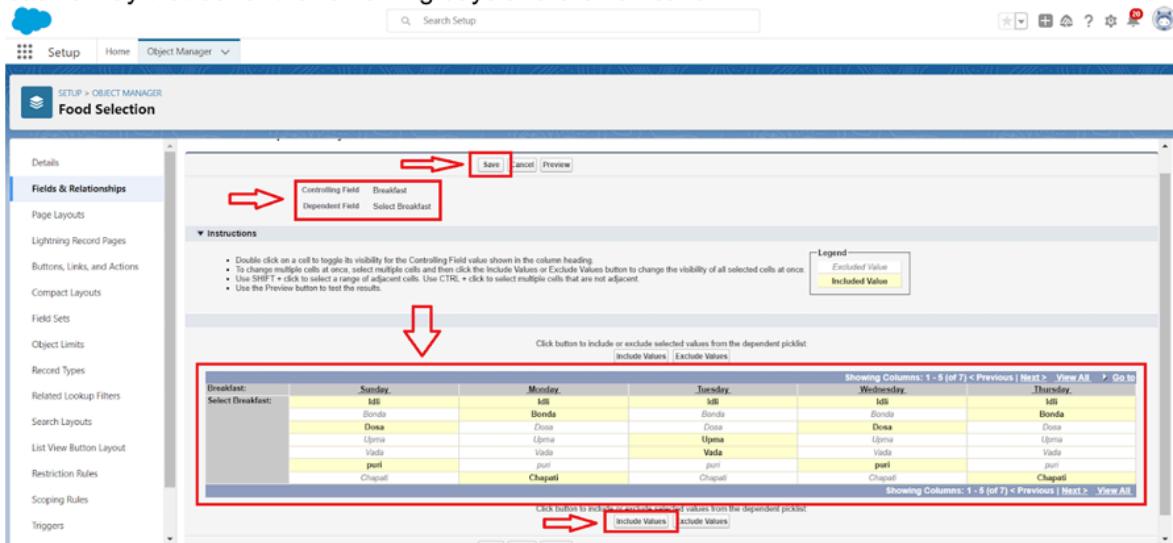
## 3. Now Click on New Option

The screenshot shows the 'Food Selection Field Dependencies' page. A red box highlights the 'Food Selection' tab in the top navigation bar. Another red box highlights the 'Fields & Relationships' link in the sidebar. A red arrow points from the left towards the 'Fields & Relationships' link. On the right, a red box highlights the 'New' button in the top right corner of the main grid area.

## 4. Under Controlling Field: Breakfast, Dependent Field: Select Breakfast and Click on Continue



5. Under the Sunday Ctrl and select the Picklist values Idli,Dosa,Puri and Click on Include Values in such a way that do for the remaining days and click on save.



## 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)

Validation Rule Edit

Rule Name: check\_box\_rule

Active:

Description: checkbox field is equal to false then only the record should be save.

Error Condition Formula

Example: Discount\_Percent\_\_c > 30% More Examples...  
Display an error if Discount is more than 30%

If this formula expression is true, display the test defined in the Error Message area

Insert Field: Insert Operator:

Functions: All Function Categories

Check Syntax: No errors found

Error Message

Example: Discount percent cannot exceed 30%  
This message will appear when Error Condition formula is true

For Message: Check box should be checked

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page  Field: Advance payment for 1month

7. Click on save.

## create a Another 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 “check in rule” and make the validation should be Active.
4. Enter the formula in the formula Box “ Check\_in\_c = False ” and check for syntax error.
5. Enter the error message “Check box should be checked”
6. Select error location as field(Check in)

Validation Rule Edit

Rule Name: check\_in\_rule

Active:

Description:

Error Condition Formula

Example: Discount\_Percent\_\_c > 30% More Examples...  
Display an error if Discount is more than 30%

If this formula expression is true, display the test defined in the Error Message area

Insert Field: Insert Operator:

Functions: All Function Categories

Check Syntax: No errors found

Error Message

Example: Discount percent cannot exceed 30%  
This message will appear when Error Condition formula is true

For Message: Check box should be checked

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page  Field: Check in

7. Click on save.

## Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by

the user's job function. For example System Administrator, Developer, Sales Representative.

## **Types of profiles in salesforce**

### **1. Standard profiles:**

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

### **2. Custom Profiles:**

#### **Custom ones defined by us.**

They can be deleted if there are no users assigned with that particular one.

Custom user Profile To create a new profile:

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="Custom user"/>

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.

Basic Access

	Read	Create	Edit	Delete	View All	Modify All
Customers	<input checked="" type="checkbox"/>					
Feedbacks	<input checked="" type="checkbox"/>					
Food Selections	<input checked="" type="checkbox"/>					

Data Administration

	Read	Create	Edit	Delete	View All	Modify All
Payments	<input checked="" type="checkbox"/>					
Room Bookings	<input checked="" type="checkbox"/>					
Total Rooms	<input checked="" type="checkbox"/>					

Session Settings

Session Times Out After: 8 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

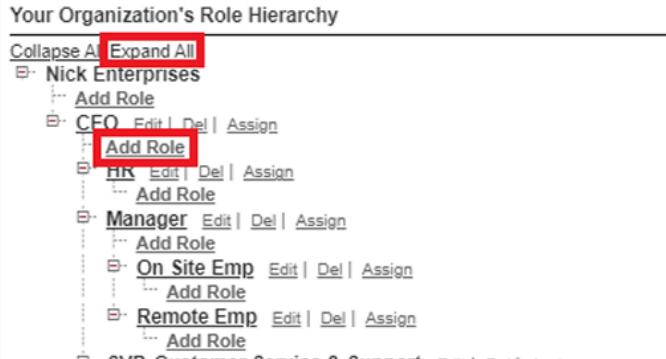
5. Scroll down and Click on Save.

## 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.

SETUP Roles

Role Edit  
New Role

Help for this Page ?

Role Edit

Label	Marketing
Role Name	Marketing
This role reports to	CEO
Role Name as displayed on reports	

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

4. Then click on Save.

## 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.

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. On the left, there's a sidebar with various setup categories like 'Permission Set Groups', 'Profiles', 'Public Groups', etc., and a 'Users' section which is highlighted with a red box and has a red arrow pointing to it. The main area is titled 'All Users' and contains a table of user records. At the top of this table, there are three buttons: 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A red arrow points to the 'New User' button.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Androthy Veera Venkata Varanasi	VAntri	newreseci@thesmartedge.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	shady.00d500000dyv7eav.65b1vapthbz@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit	User Integration	ztes	integration@00d500000dyv7eav.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User Security	sec	insightssecurity@000500000dyv7eav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security 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

## 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.

## 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.

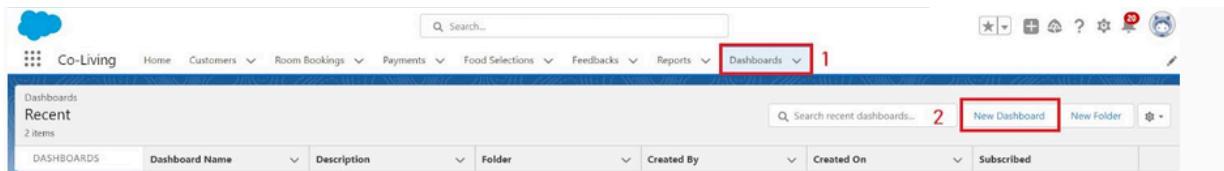
6. Save or run it.

## 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

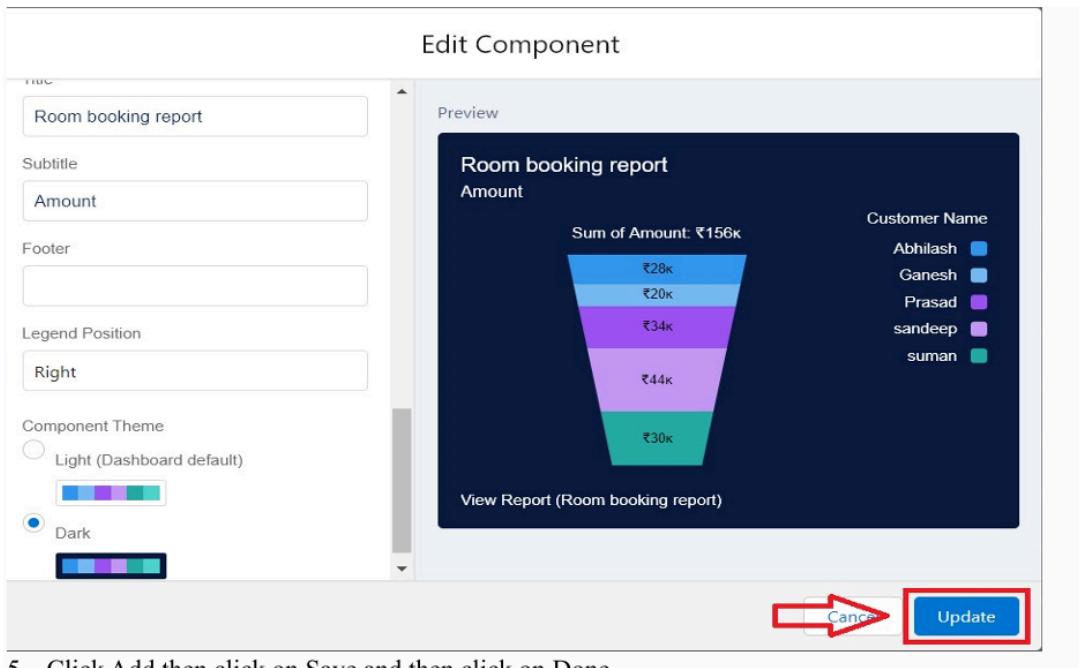


2. Give a Name and click on Create.
3. Select add component.
4. Select a Report Customer with Room Booking and click on select.

A screenshot of a 'Select Report' dialog box. On the left, there is a sidebar with sections for 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports) and 'Folders' (Created by Me, Shared with Me, All Folders). The main area is titled 'Select Report' and contains a search bar 'Search Reports and Folders...'. Below the search bar, a list of reports is shown:

- Room booking report (highlighted with a red box and arrow)
- Room booking report (Veera Venkata Varaprasad Androthu - 14-Jun-2023, 2:58 pm - custom report)
- Room booking report (Veera Venkata Varaprasad Androthu - 07-Jun-2023, 4:53 pm - Private Reports)
- Sample Flow Report: Screen Flows (Automated Process - 05-Jun-2023, 10:09 am - Public Reports)

A large red box highlights the 'Room booking report' entry. A red arrow points to the 'Select' button at the bottom right of the dialog box.



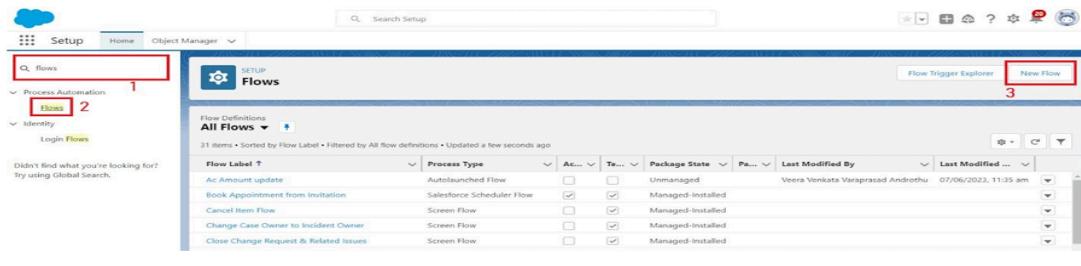
- Click Add then click on Save and then click on Done.

## Flows

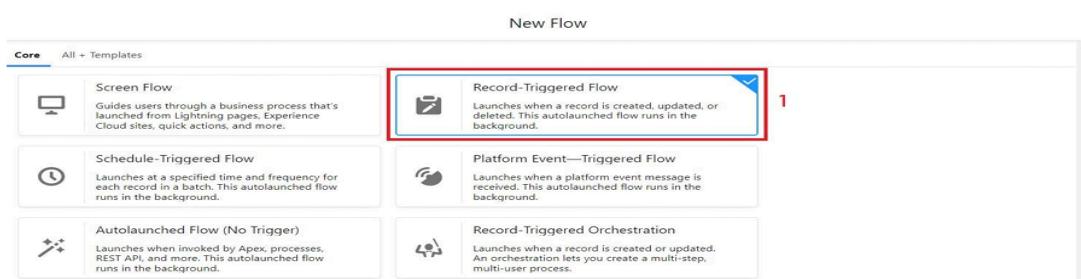
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

### Create a Flow

- Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.



- Select the Record-triggered flow and Click on Create.



3. Select the Object as a Room Booking in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.
6. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Decision Element".
7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Single sharing.
- Click on "Add Condition"
- Resource: Select Record.AC-3000.
- Operator: Select Equals. • Value: Select False.
- Click on "+" Symbol In the Outcome Order.

New Decision

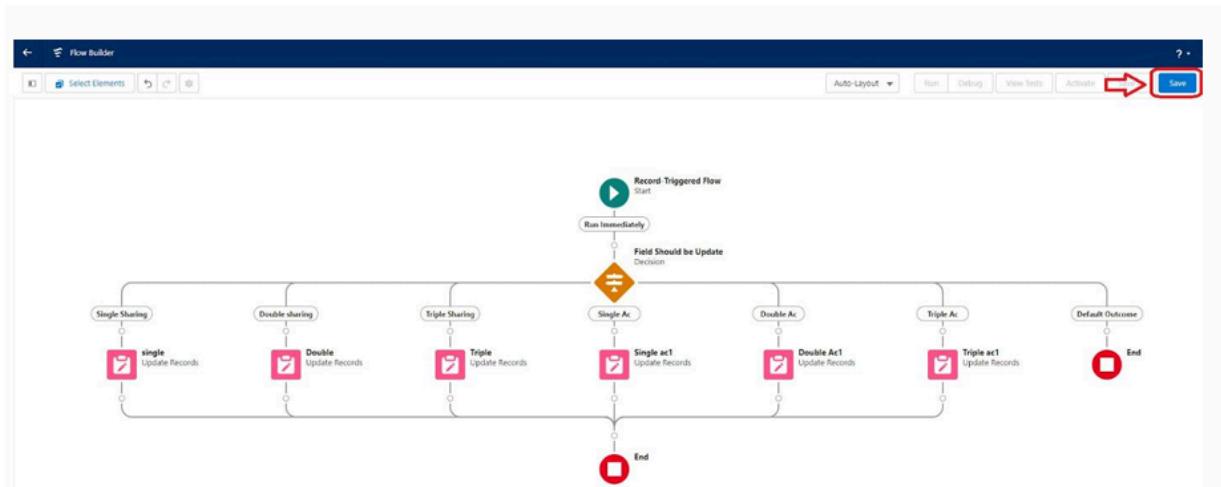
Description 1

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS
1 Single Sharing 4	*Label Single Sharing *Outcome API Name Single_Sharing
Default Outcome	
Condition Requirements to Execute Outcome All Conditions Are Met (AND)	
Resource: \$Record > Room sharing Operator: Equals Value: single sharing	
AND Resource: \$Record > AC - 3000 Operator: Equals Value: False	
<a href="#">+ Add Condition</a>	

Cancel Done

The Flow will Form like This and Click on save.



## Conclusion:

The CRM application for managing bookings in your co-living space is an essential tool to streamline and enhance the customer experience. It will allow you to efficiently manage and store customer details, enabling residents to easily choose from different air-conditioned rooms with multiple sharing options. The platform will also enable users to select special food items on a daily basis, catering to their individual preferences. Additionally, the application will support multiple payment modes, ensuring flexibility and convenience for residents. Moreover, the feedback feature will empower residents to provide insights into the quality of services, such as room cleaning, internet connectivity, and food services, which will help maintain and improve service standards. Overall, this CRM system will not only foster a seamless living experience but also reinforce the values of collaboration, comfort, and community that are at the core of the co-living concept. By balancing privacy and communal living, the application will support the creation of a vibrant and inclusive environment, allowing individuals to connect, thrive, and enhance their quality of life.