A CRM Application to Manage the Booking of Co-Living

Abstract: Our co-living space project fostersan inclusive communitywhere 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 serviceslike room cleaning, internetconnection, and food.

Features and Functionality:

1. **Customer Management**
   a. **Customer Registration:** Users can registerthemselves by providing personal details such asname, email, phone number, and address.
   b. **Customer Profile:** A user profile will be created to store customer information,bookinghistory, 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 eachroomtype 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 toselect from.
   b. **Daily Food Selection:** Users can select food items for each day of theirstay.
   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 ascredit/debit cards, net banking, or wallets.
    b. **Payment History:**A record of all payments made by a user will be storedin their profile.
5. **Feedback and Review**
    a. **Service Feedback:**Users can providefeedback on various servicessuch as room cleaning, internetconnection, 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 insightson customerbehavior, preferences, and feedback.
7. **Security and Access Control**
    a. **User Authentication:** Users will be authenticated using a secure loginsystem.
    b. **Role-Based Access:** Administrators will have access to manage bookings, customer data, and reports, while users will have access to their profiles and bookinginformation.
8. **Functionality**

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

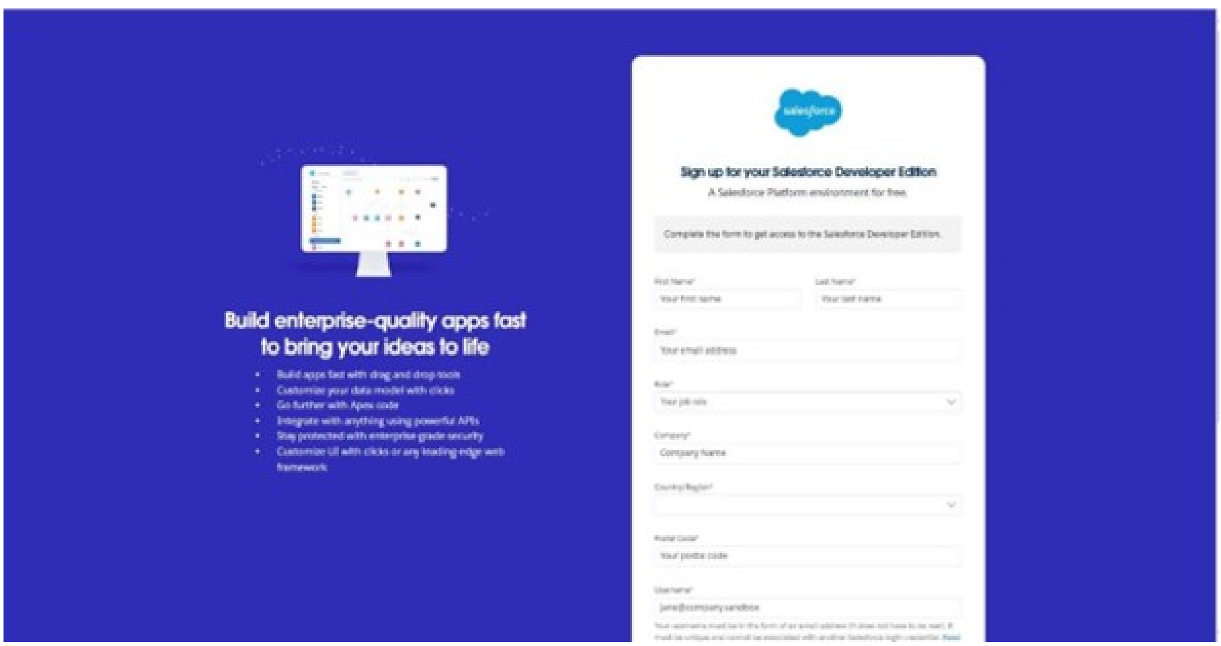
e. **Reporting and Analytics:** The application will generate reports and provide insights on customer behaviorand preferences.

Milestone 1 - Introduction to Salesforce:

What is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connectwith 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 engagewith employees and partners, and store your data securelyin the cloud.

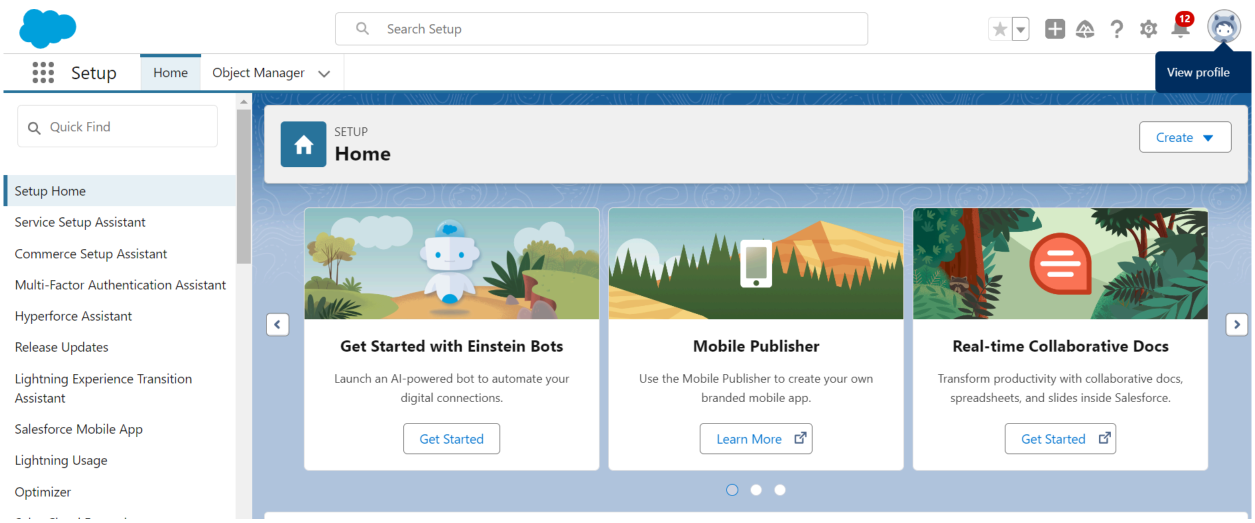
Activity 1: Creating Developer Account:



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 permityou to store data that is specificto an organization.

What are the types of Salesforce objects?

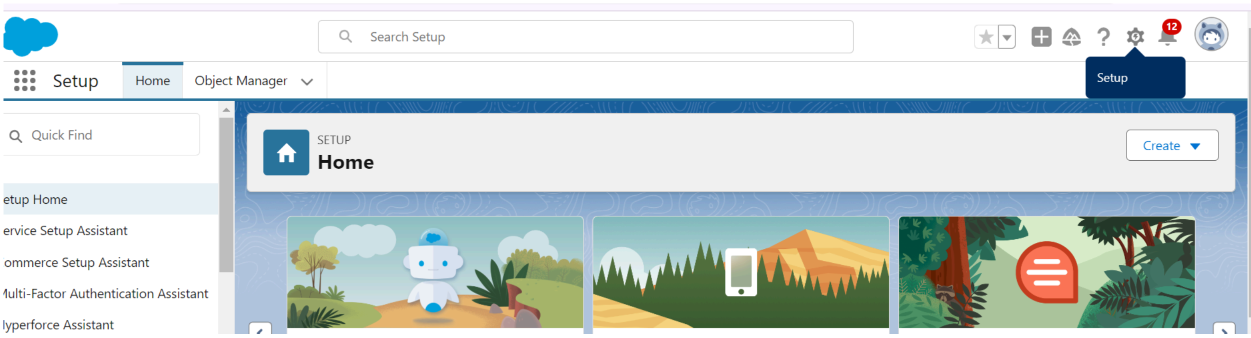
Salesforce objects are of two types:

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 createdby users. They supply information that is unique and essential to their organization. They are the heart of any application and providea data-sharing structure.

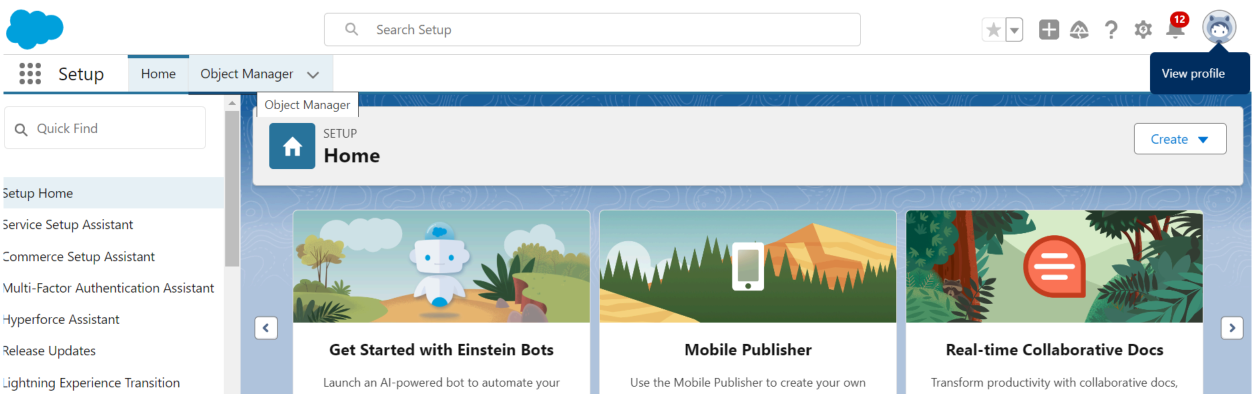
To Navigate to Setup page:

Click on gear icon ? click setup.



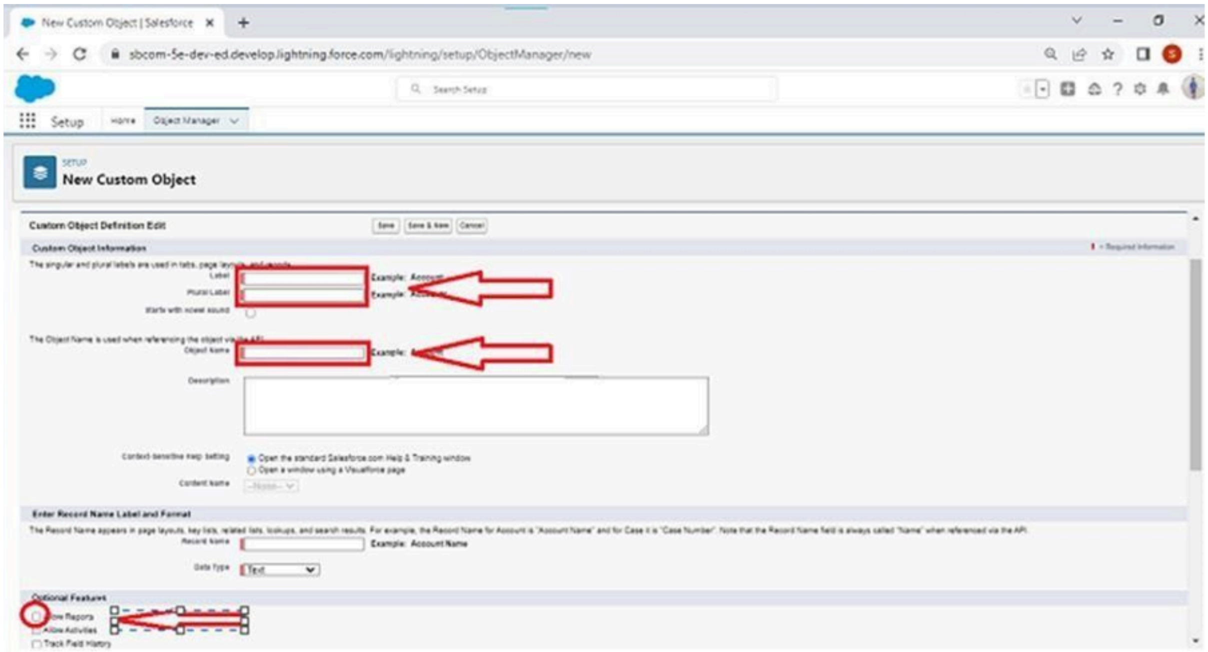
To create an object:

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.



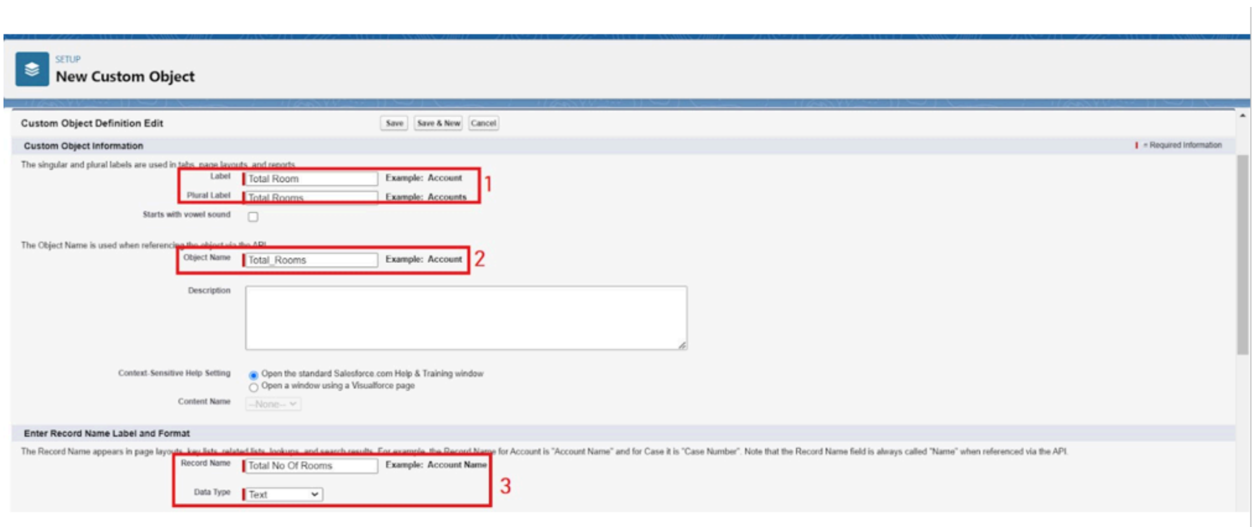
Click on Save.

Activity 1: Create a custom objectfor Total Rooms

To create an object:

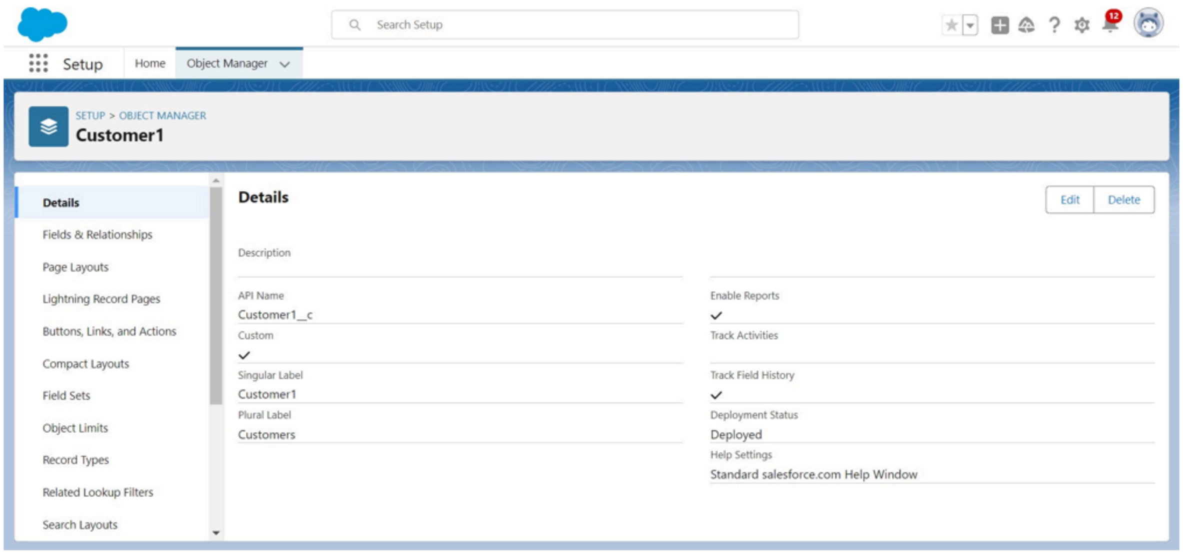
From the setup page Click on Object Manager Click on Create Click on Custom Object.

1. Enterthe label name Supplier
2. Plural label name? Suppliers
3. Fill in the labelas " TotalRoom ".
4. Fill in the plural labelas " TotalRooms ".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. Inthe Optional Featuressection, 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 CreationOptions section, selectAdd Notes and Attachments relatedlistto default pagelayout.

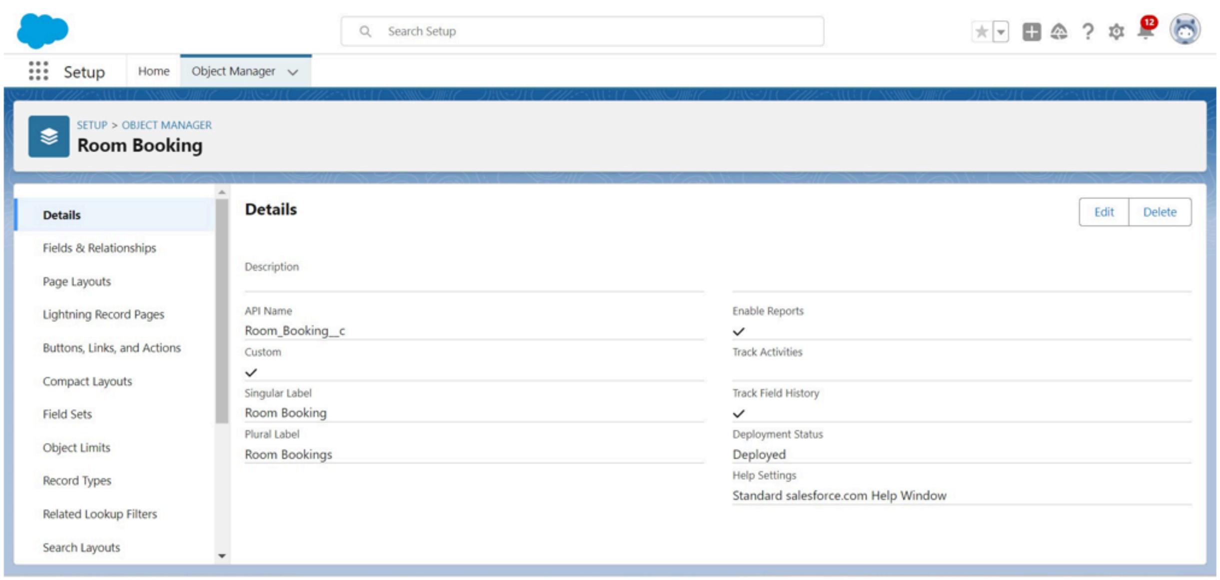


Leave everything else as is, and clickSave.

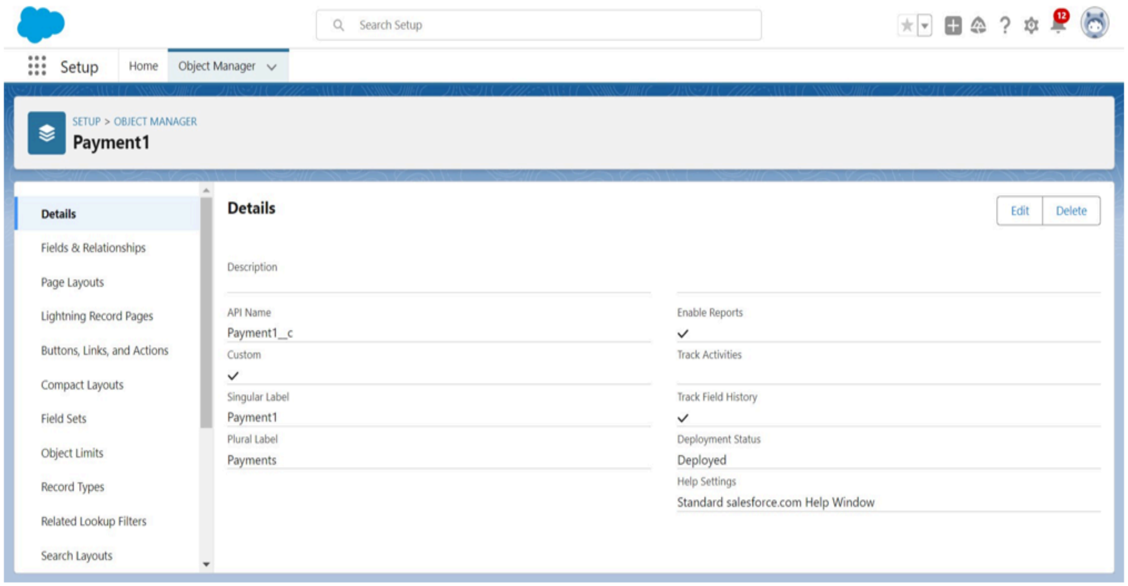
Create a custom object for Customer



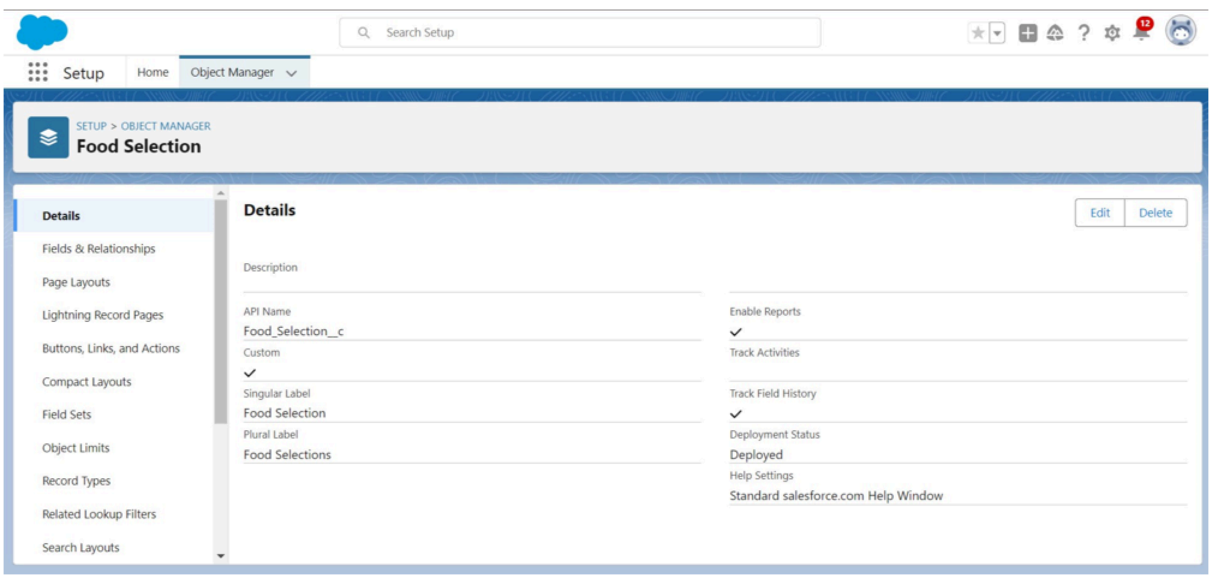
Create a custom object for Room Booking



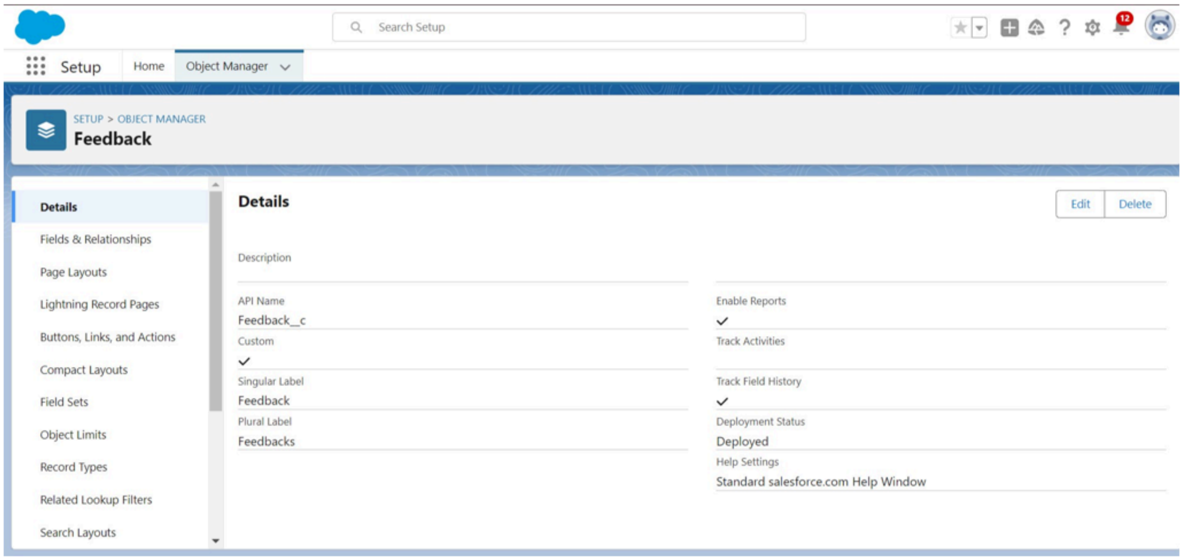
Create a custom object for Payment



Create a customobject for Food Selection



Create a customobject for Feedback



Milestone 3 - Tabs

What is Tab : A tab is like a user interface that is used to build records for objects and to viewthe 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 easierfor your users to quicklyaccess content and applications they frequently use without leaving the salesforce.com application.

Visualforce Tabs :

Visualforce Tabs are custom tabs that displaya Visualforce page.Visualforce tabs look and behavelike 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.

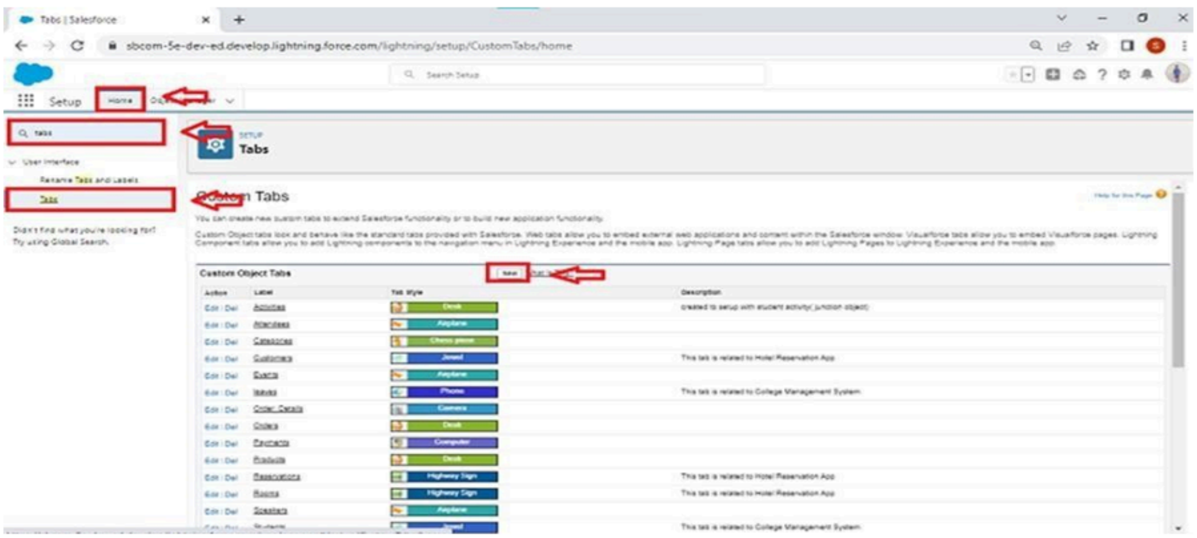
Lightning Page Tabs :

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.

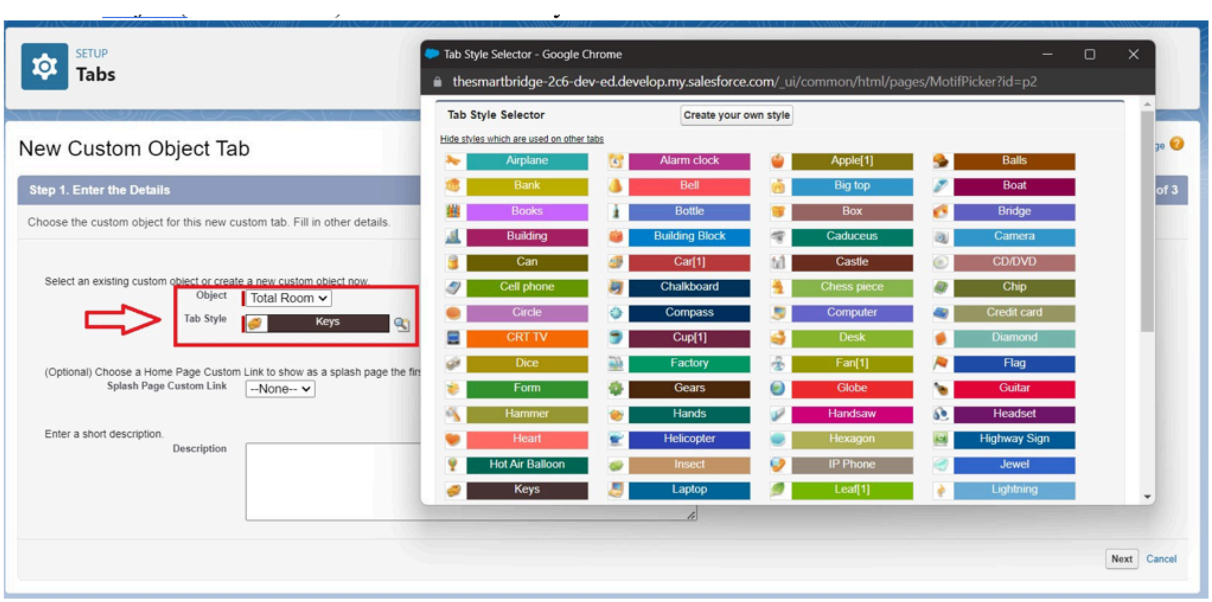
Activity 1: Creating a Tab for Total Rooms

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.



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 objecttab)
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

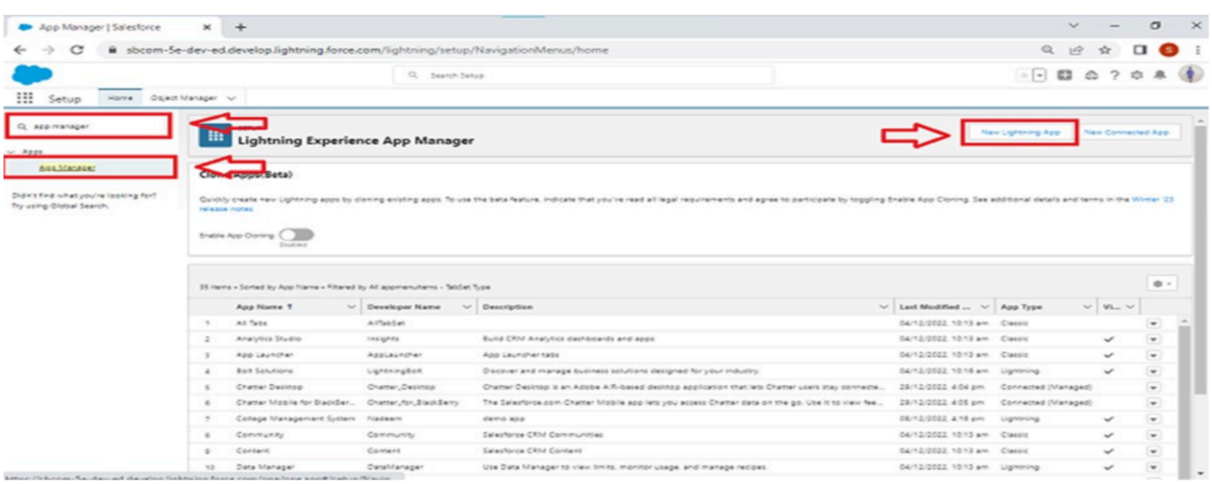
Now create the tabs for Payments, Food Selections, Feedbacks Objects.

Milestone 4 - The LightningApp

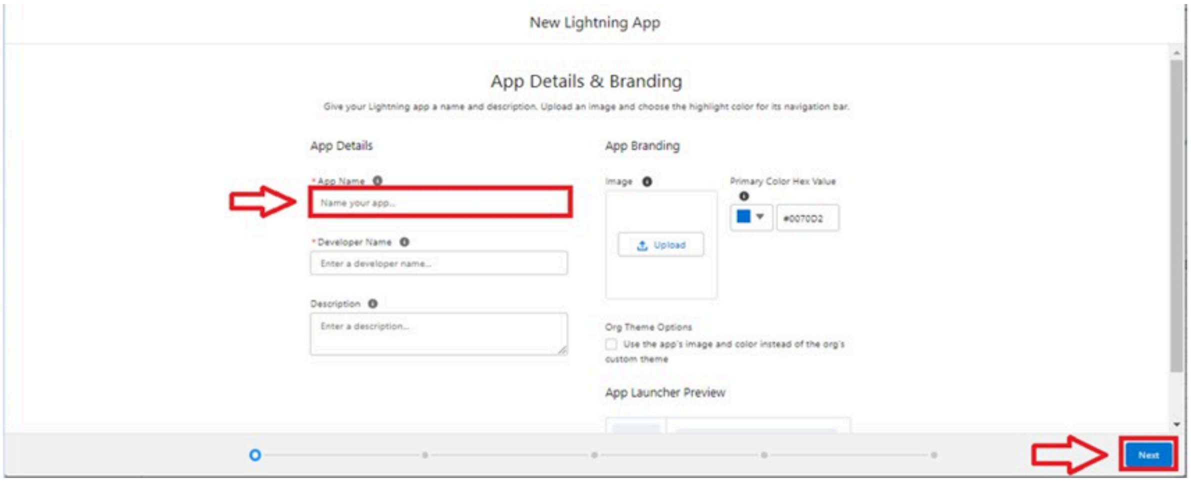
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightningapps give your users access to sets of objects,tabs, and other items all in one convenient bundle in the navigation bar.
Lightning apps let you brand your apps with a custom color and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

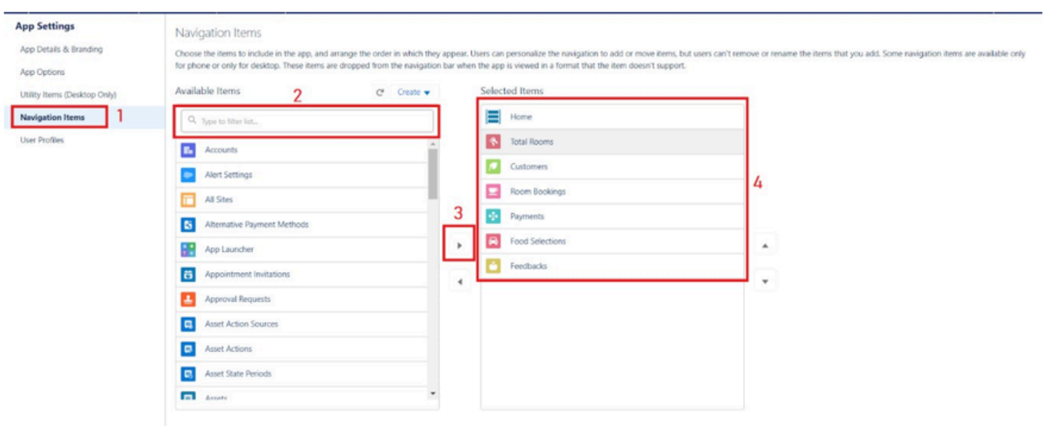
Go to setup page > search “app manager” in quick find > select “app manager” > click on NewlightningApp.



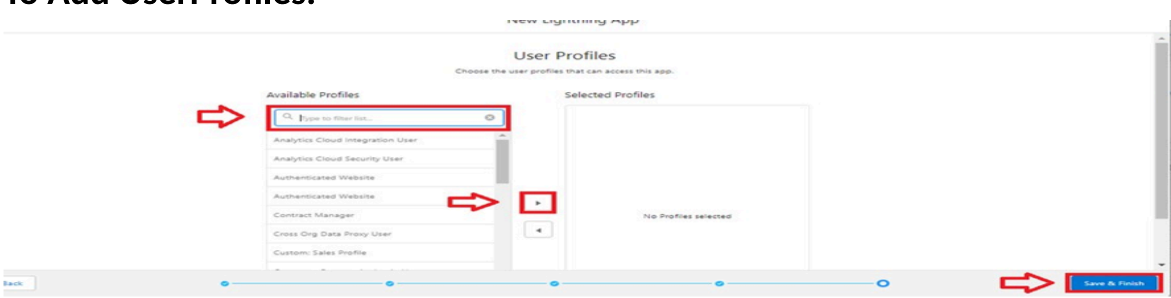
2.Fill the app name in app details and branding > Next > (App option page)keep it as default> Next> (Utility Items) keep itas default > Next.



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 valuableinformation that you require for a specificobject. Hence, the overall searching, deletion, and editing of the records becomesimpler 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 simplydelete a StandardField until it is a nonrequired 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:

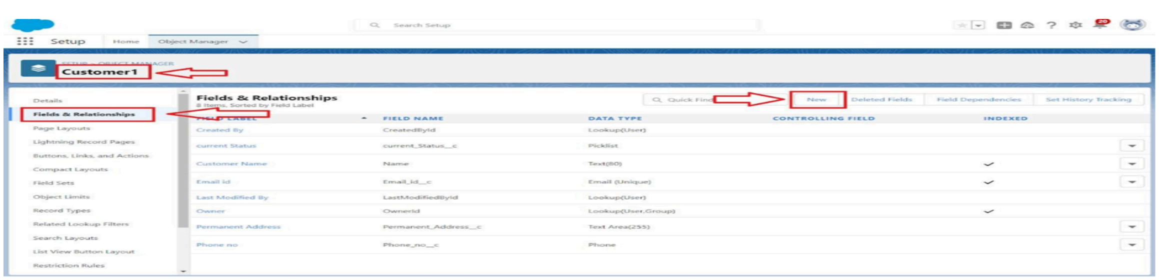
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision dependson the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

Activity 1: Creation of fields for the customer1 object

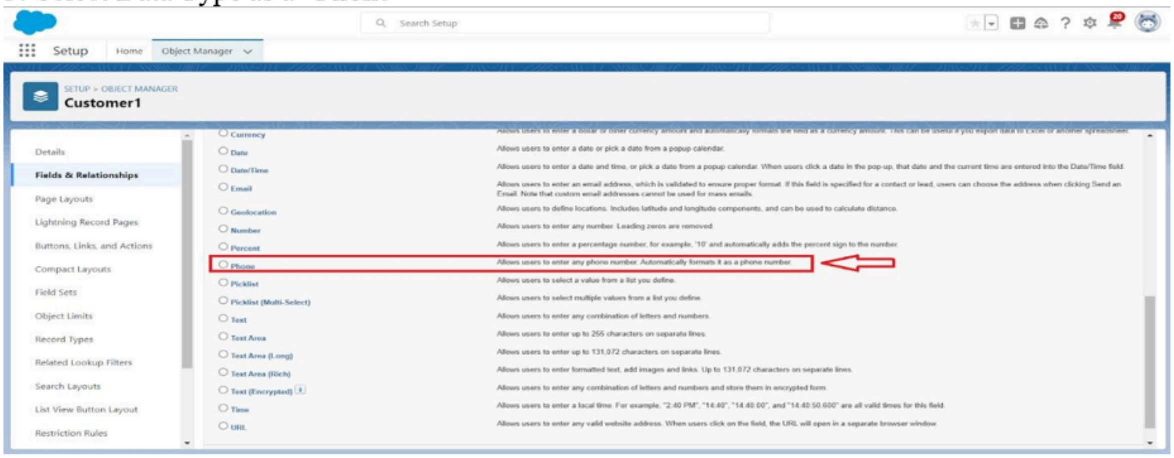
To create fields in an object:

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

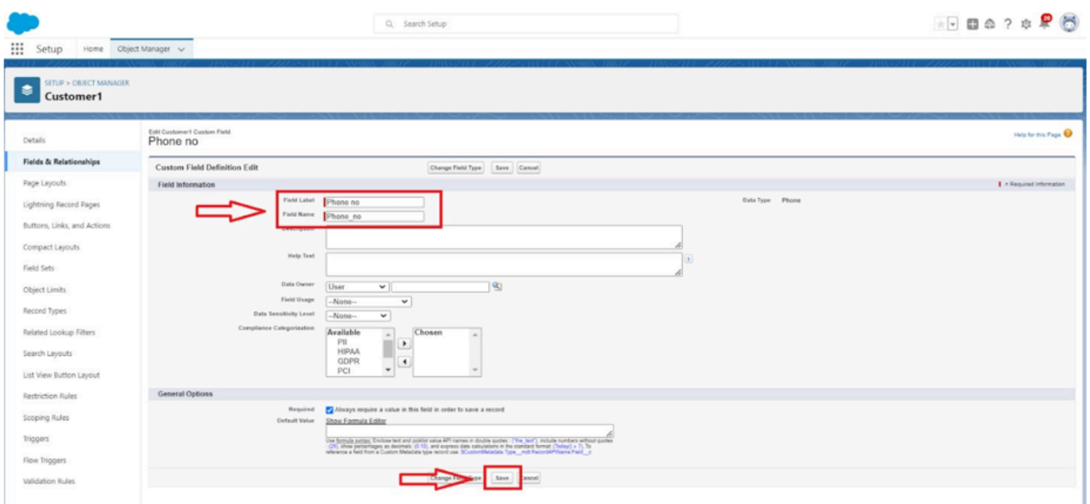
2.Now clickon “Fields & Relationships” > New



3. Select Data Type as a “Phone”



4. Click on next



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 anotherfields 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

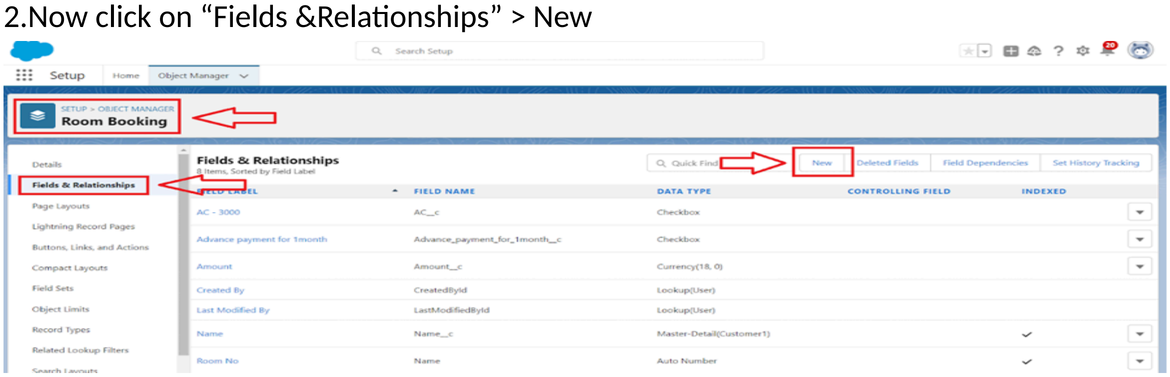
- Select required
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new.

Creation of fields for the Room Bookingobject

1. To create fields in an object:

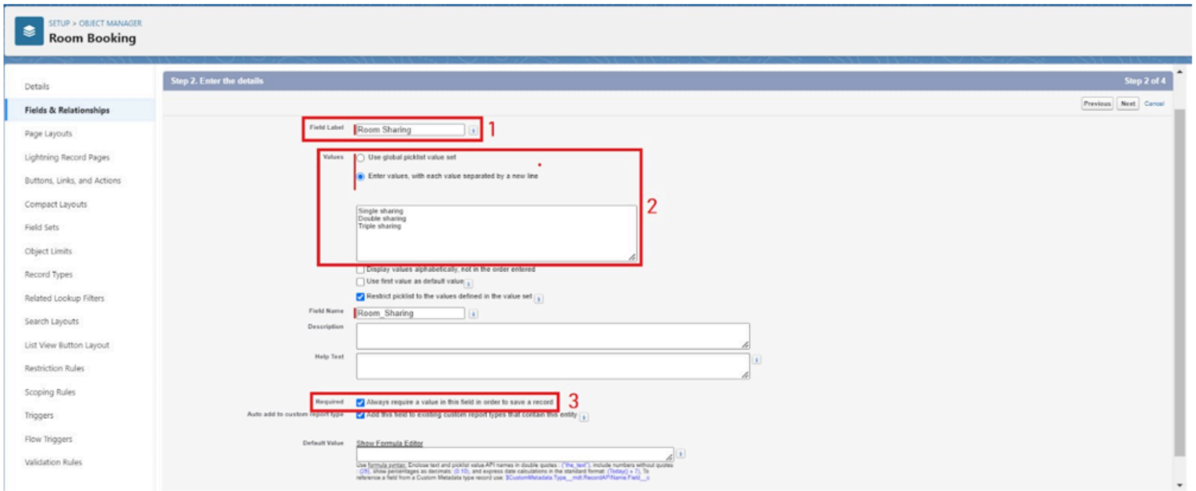
1.Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.

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



3.Select Data Type as a “Picklist”

4.Click on Next



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

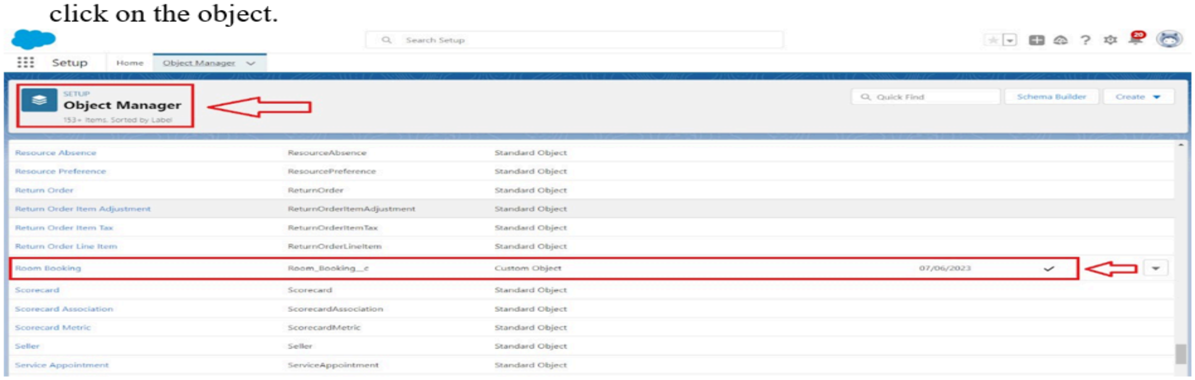
Click on Next > Next > Save and new.

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

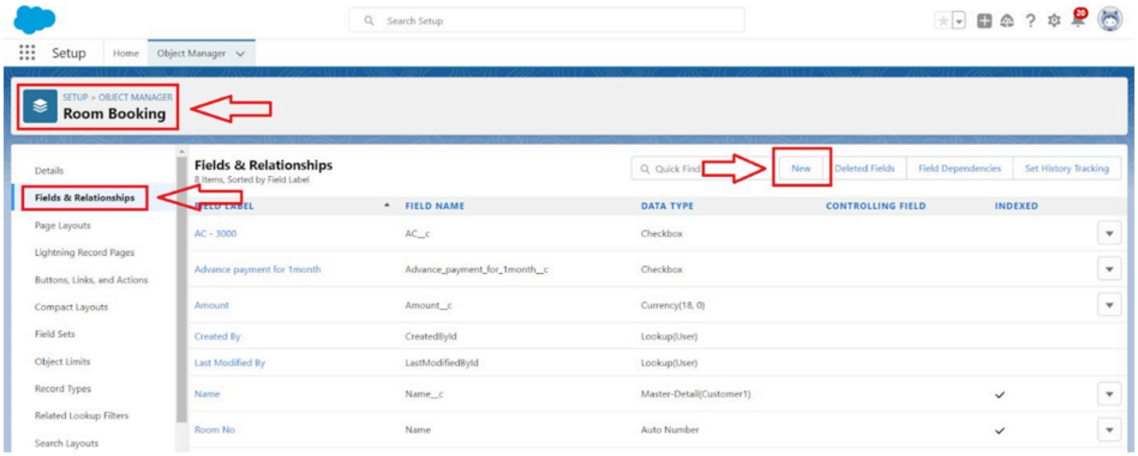
To createfields & relationship to an object:

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

click on the object.

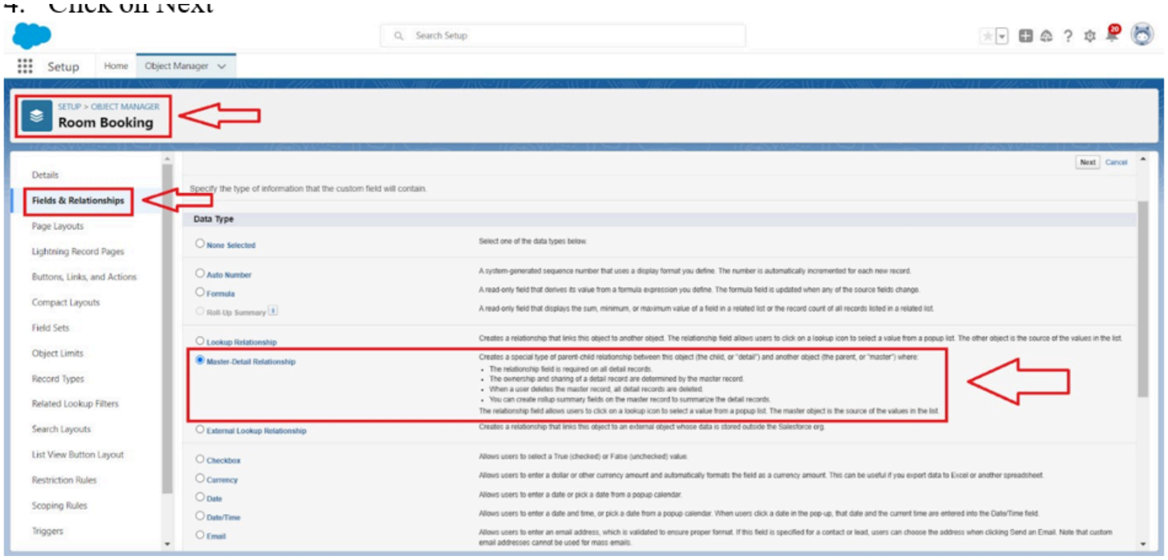


2.Now click on “Fields &Relationships” > New

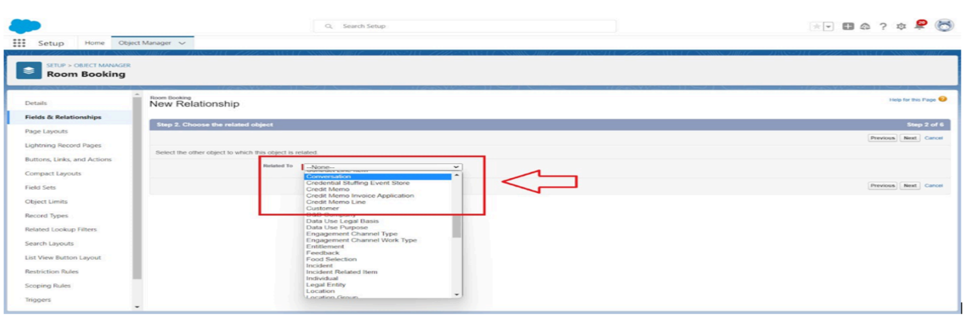


3.Select Data Type as a “Master-detail Relationship”

4.Click on Next



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



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.

3. 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
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 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
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 fieldsin an object:

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

2.Now clickon "Fields &Relationships" ? New

.Select Data Type as a "Currency"

4.Click on Next

Fillthe 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 objectname(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 Relatedto drop down and Select the "Total Rooms" objectand click on Next

Fillthe 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 SummaryField in "TotalRoom Object"

1.After Creatingthe Master- DetailRelationship 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 clickon "Fields &Relationships" ? New

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

5.Fillthe 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 selectRoll-up Type

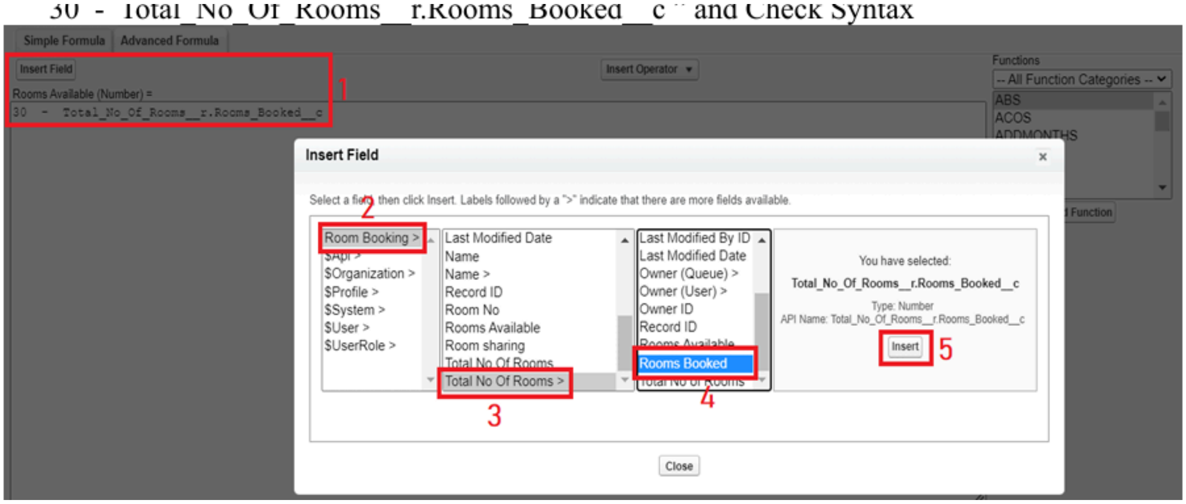
7.Click on Next > Next > Save and new

To create fields in an object:

Go to setup > click on Object Manager> type objectname(Rooms Booking) in thesearch 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

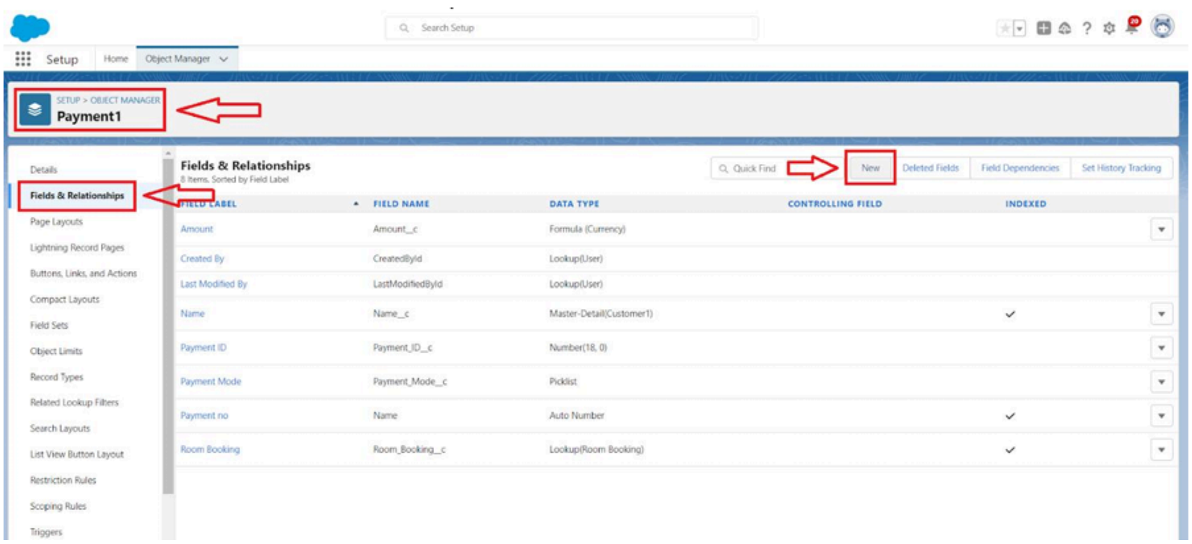
10. To create fieldsin an object:

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

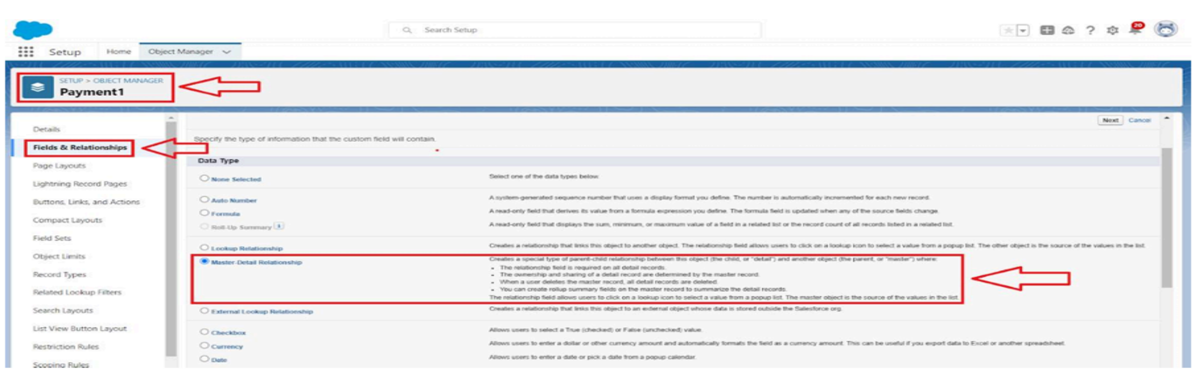
Creation of Fields & Relationship for Payment1 Object

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

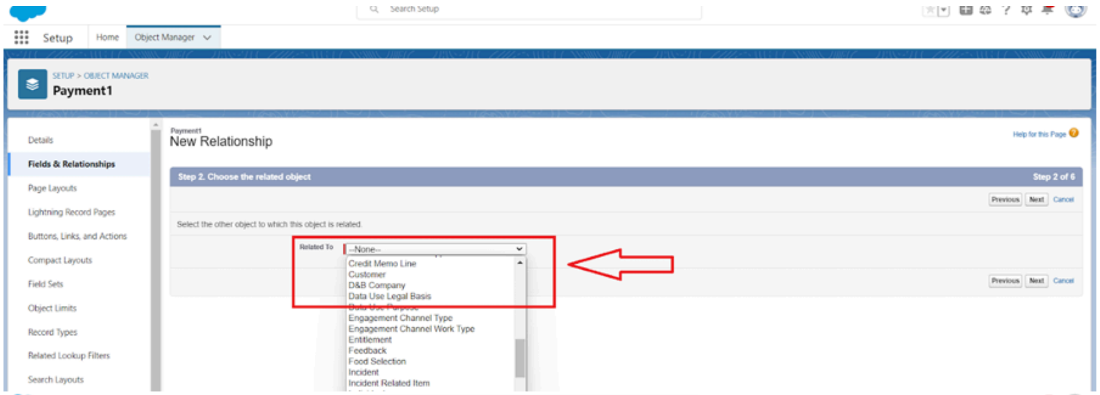


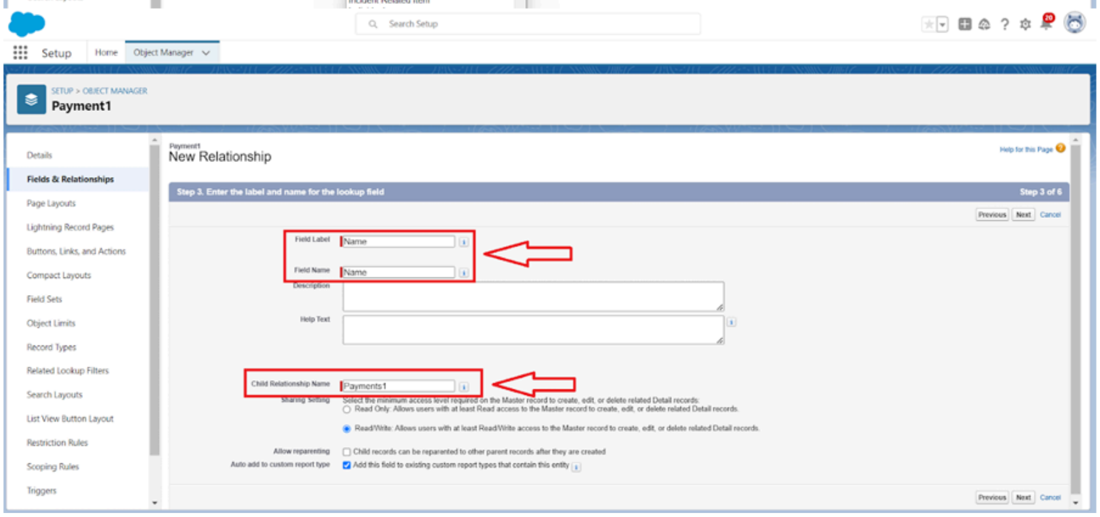
3.Select Data Type as a “Master-detail Relationship”



4.Click on Next

5.Clickon the Related to drop down and Select the Customer1 objectand click on Next





6.Fill theAbove as following:

Change the Field Label:Name

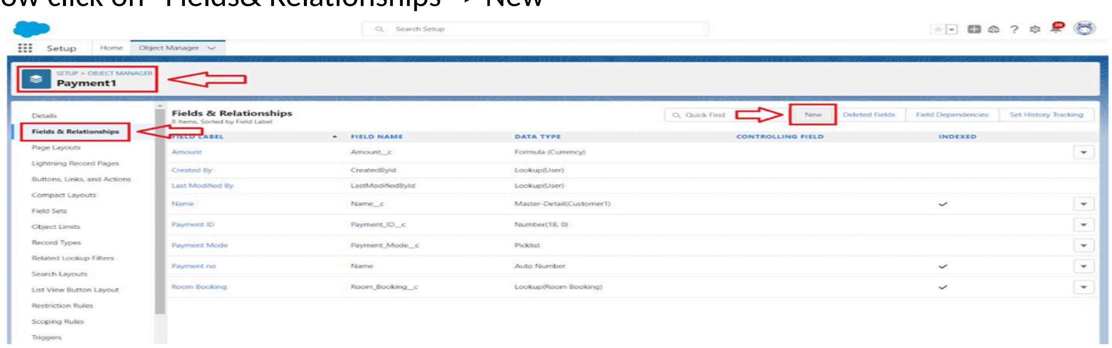
Field Name :It's gets auto generated

Click on Next > Next > Save and new.

2. To create anotherfields & relationship to an object:

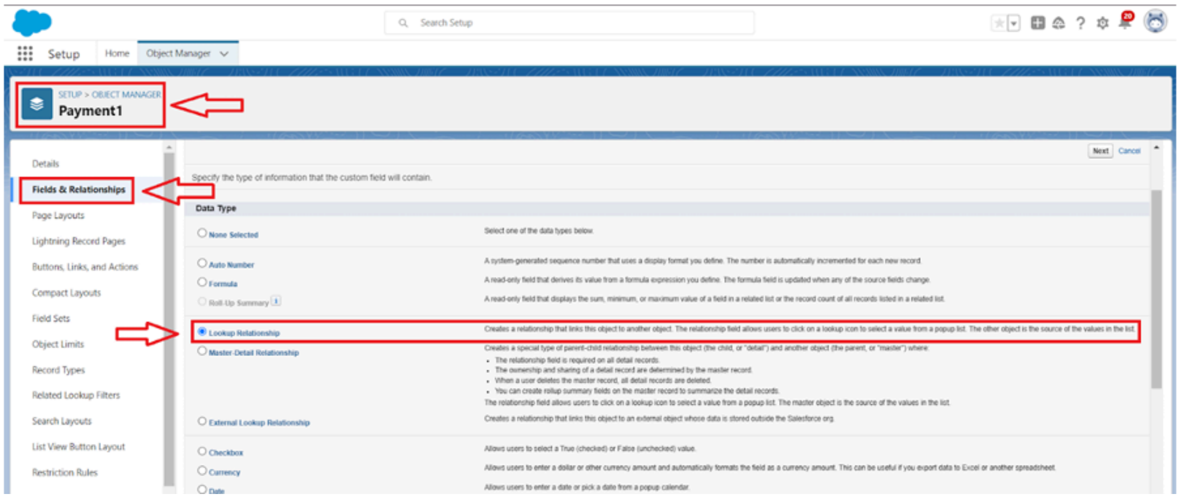
1.Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.

2.Now click on "Fields& Relationships" > New

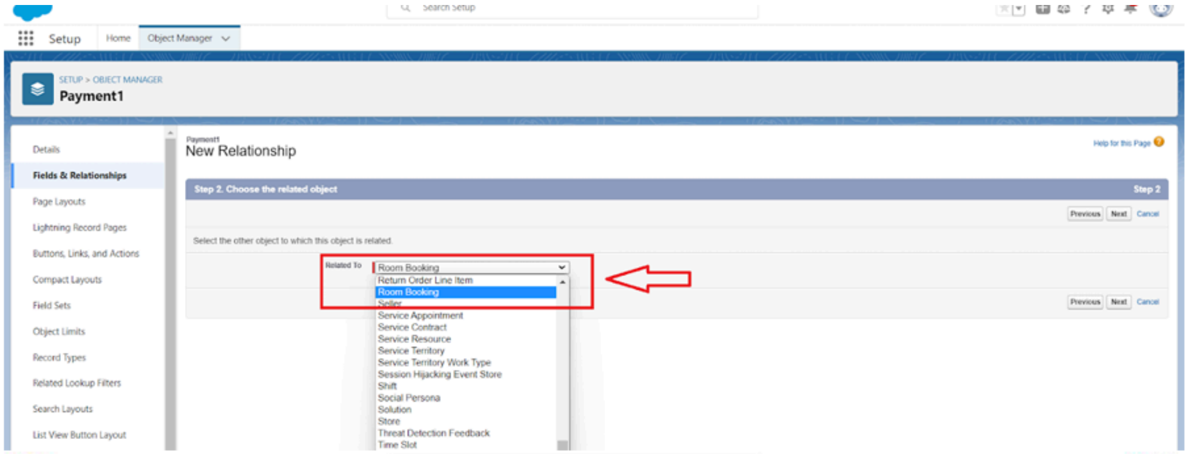


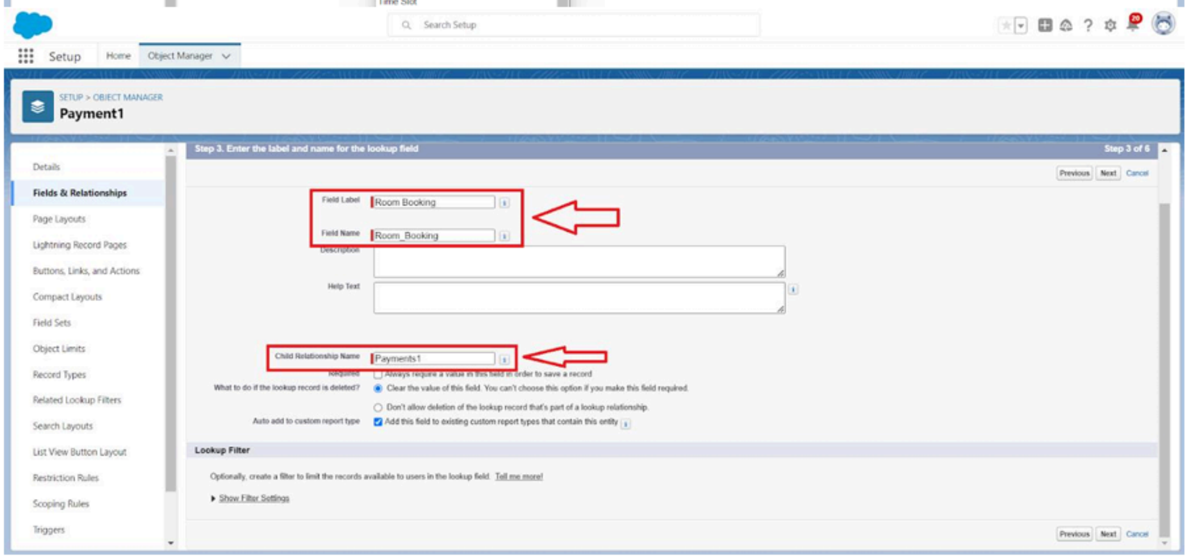
3.Select Data Type as a “LookupRelationship”

4.Clickon Next



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



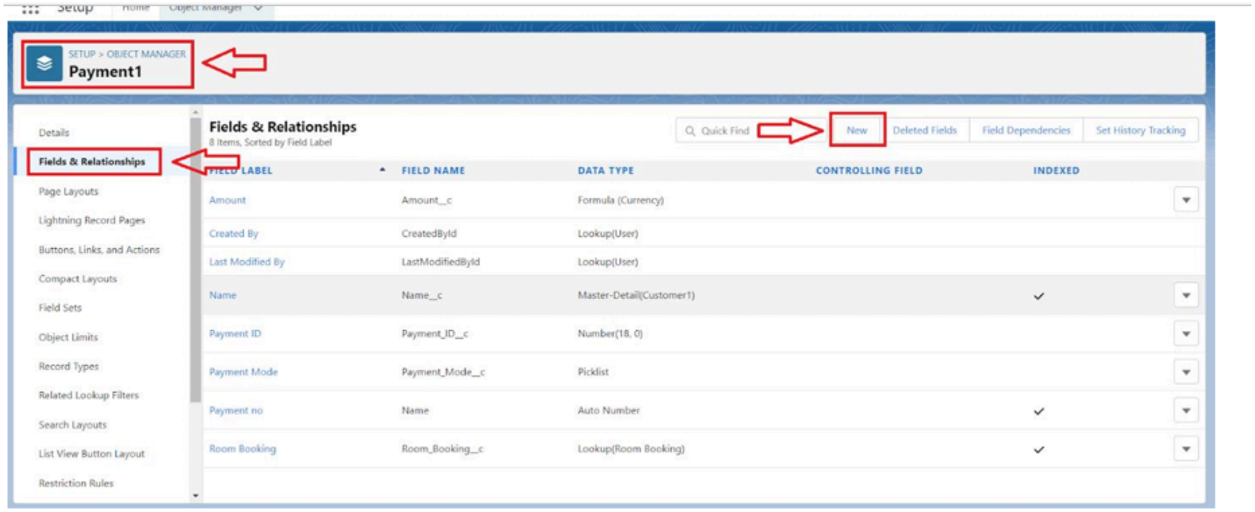


3. Creation of another fields for the Payment1 object

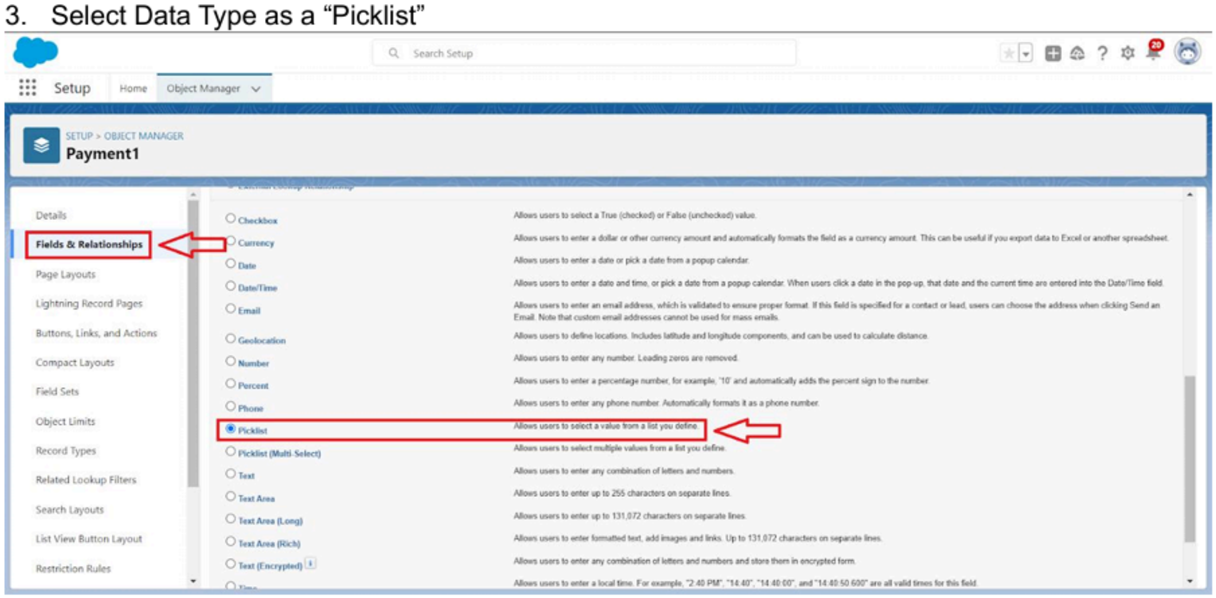
To create fields in an object:

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



3. Select Data Type as a “Picklist”



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 orcomplex workflows.

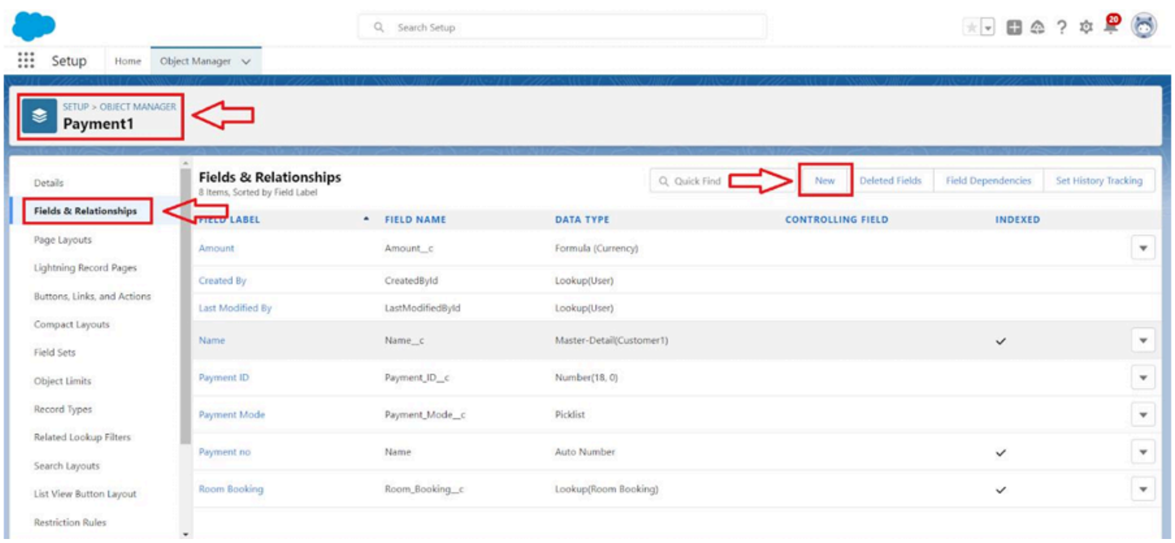
Why do we need to createthe Cross Object Formula Field:

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

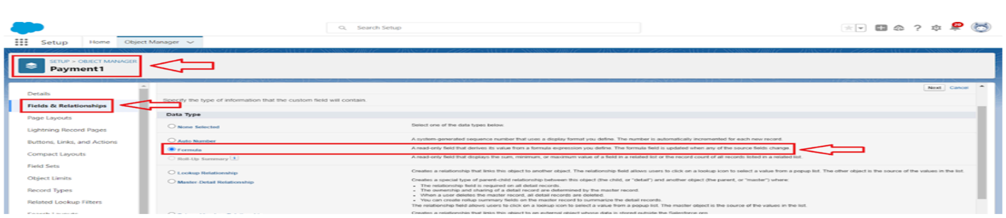
1.Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.

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

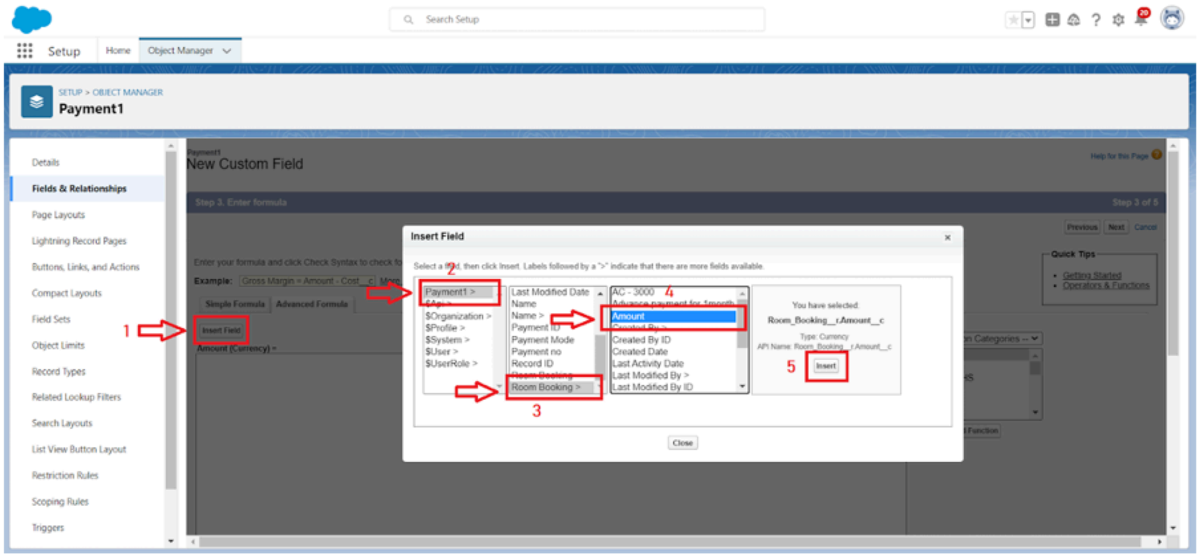


3.Select Data Type as a “Formula”

4.Clickon Next



”.



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

Picklist value sets:

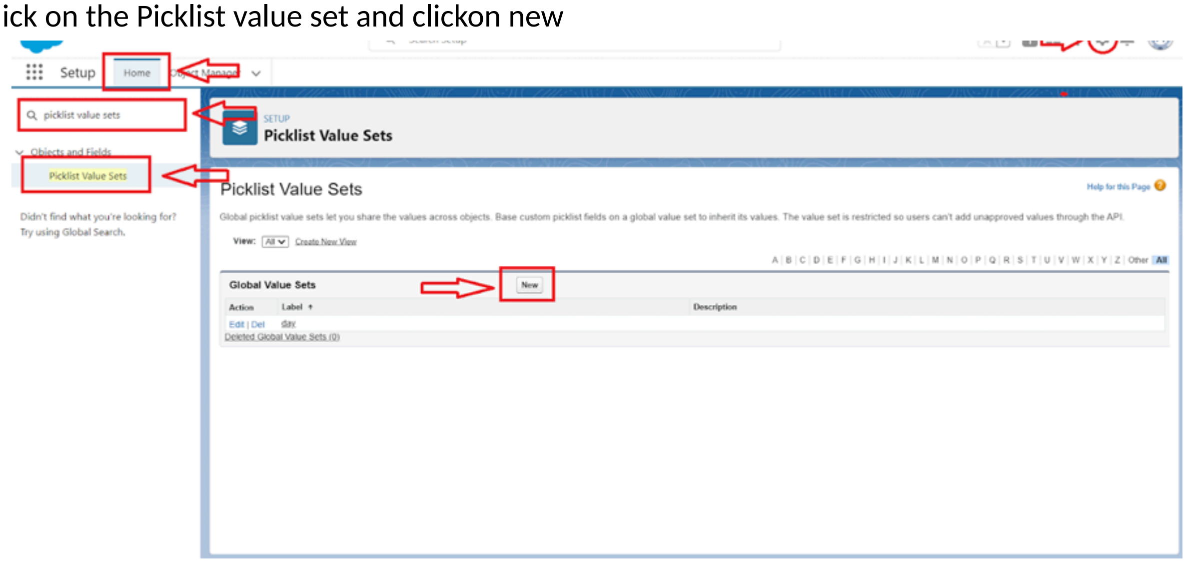
Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

Create a picklist value set:

1.Firstclick on gear icon and click on setup

2.Click on home tab in the Quick find box search for the " Picklistvalue sets "

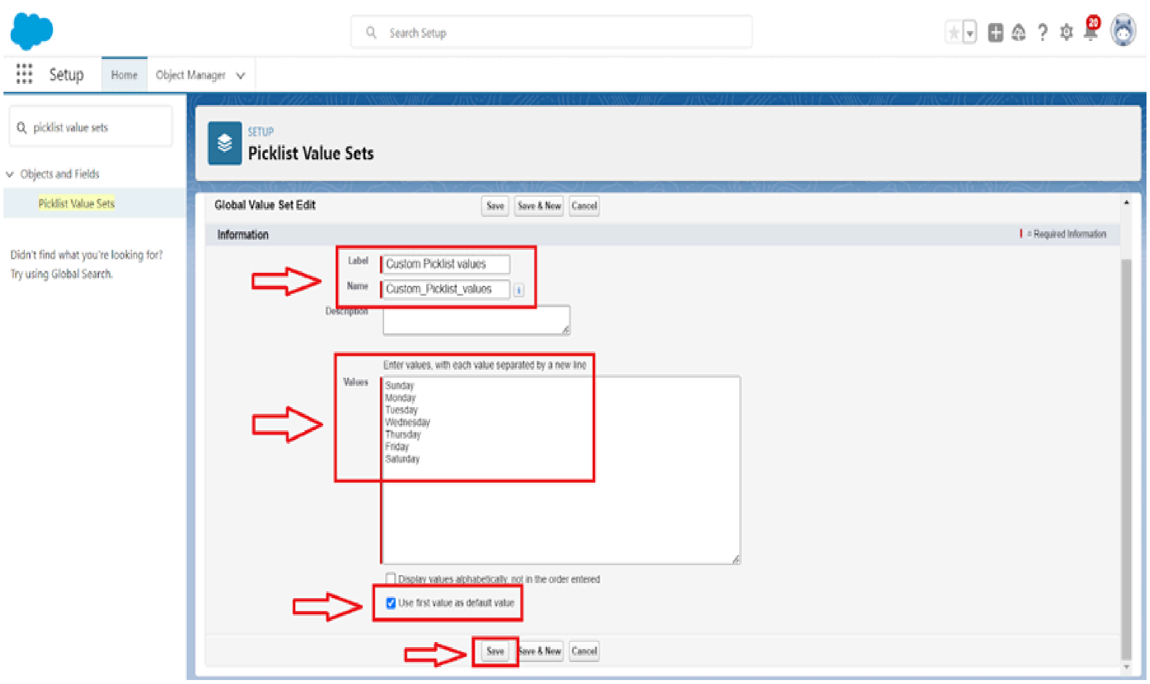
3.Click on the Picklist value set and clickon new



4.Enter theLabel name and API name automatically Generate

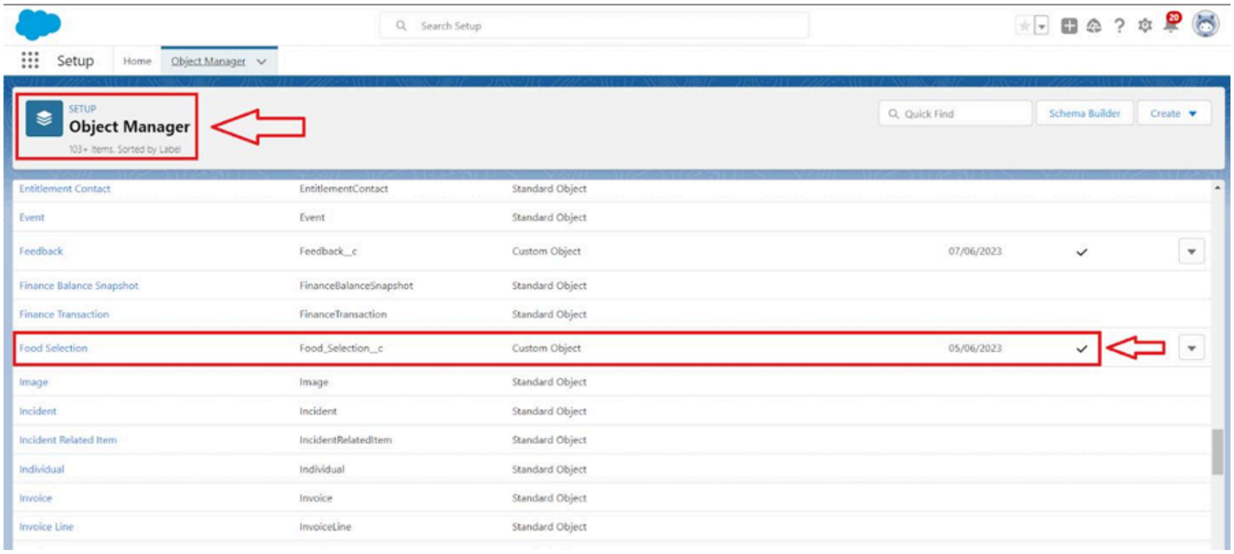
5.Enter the values with each value separated by a new line

Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

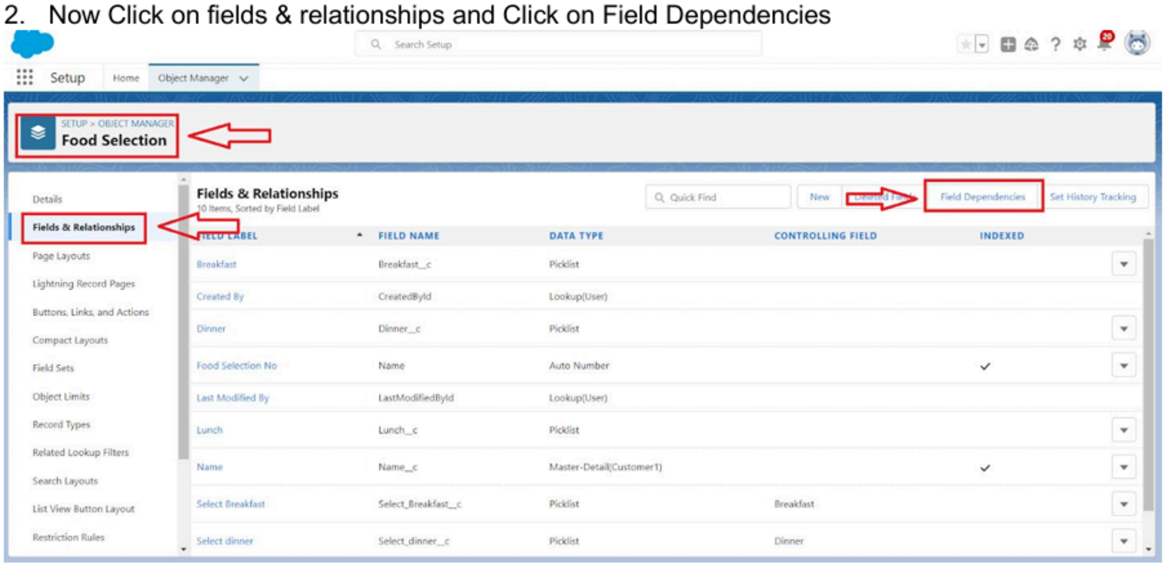


Field Dependency:

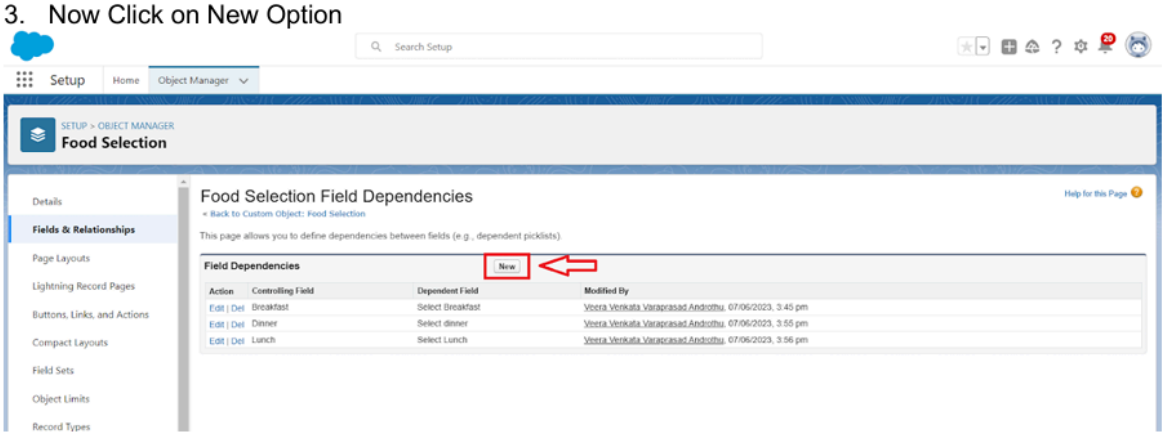
Field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by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



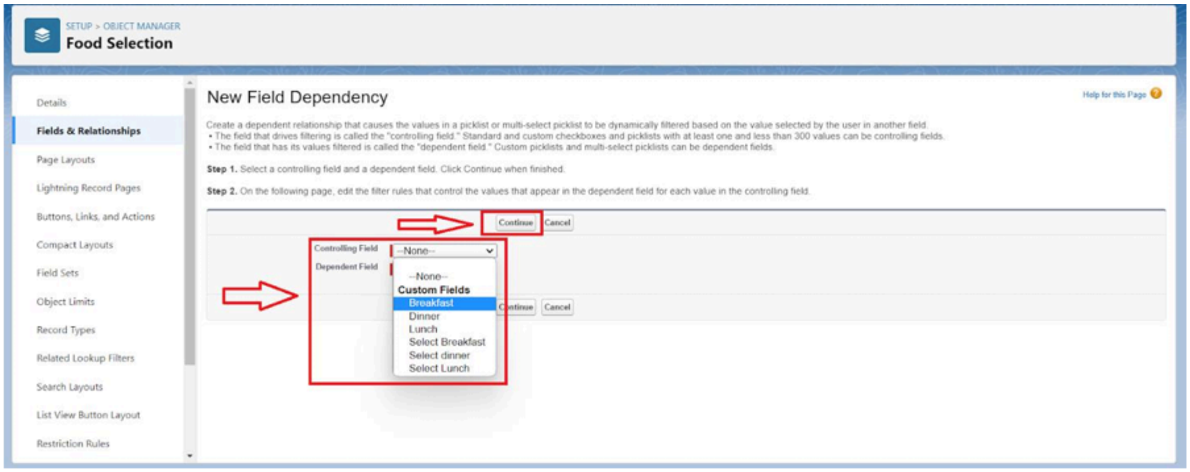
2. Now Click on fields & relationships and Click on Field Dependencies



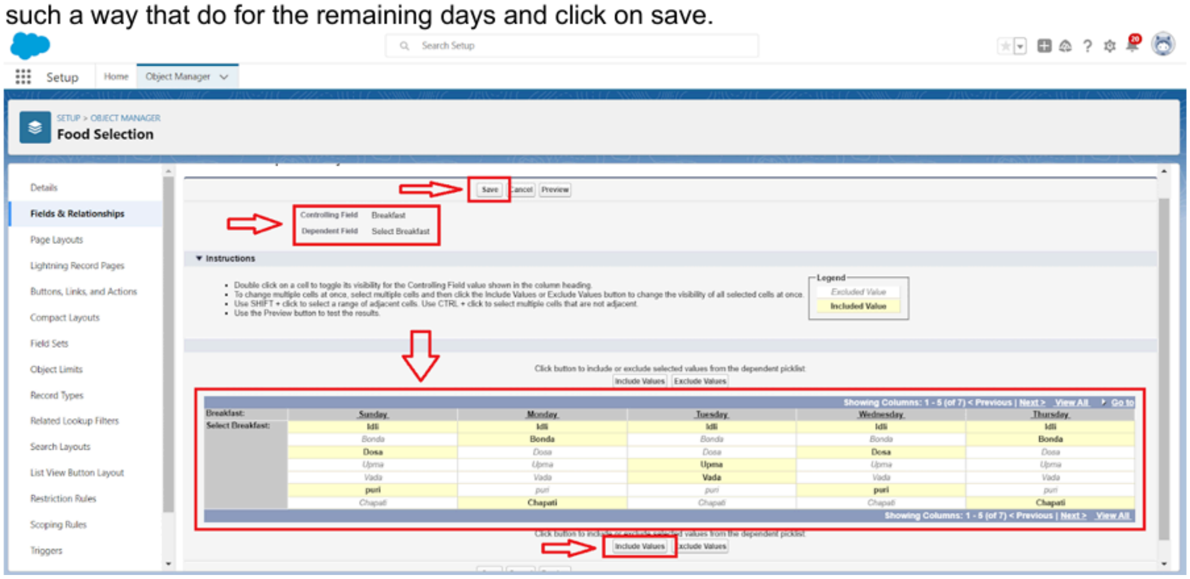
3. Now Click on New Option



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.

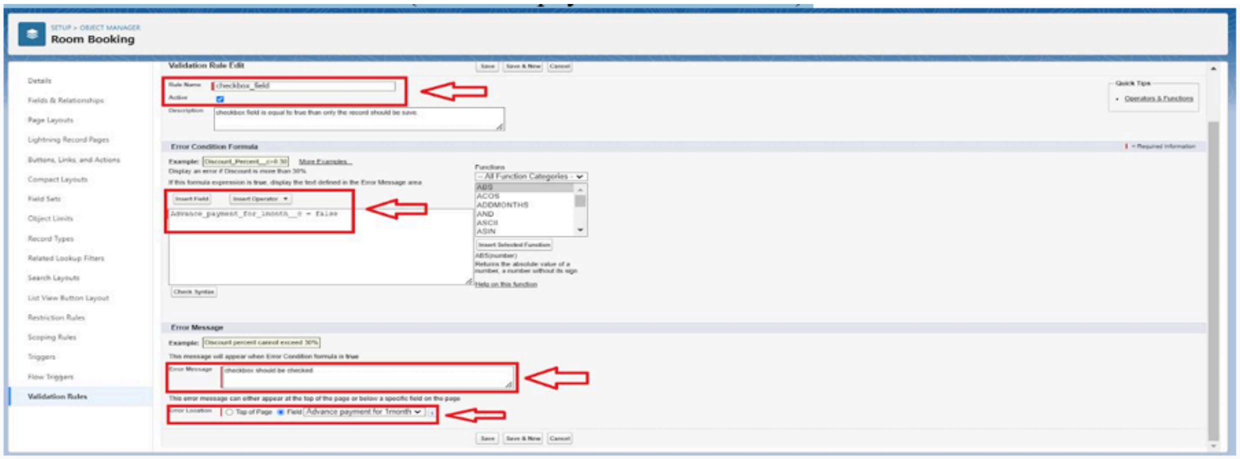


Validation rule

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”

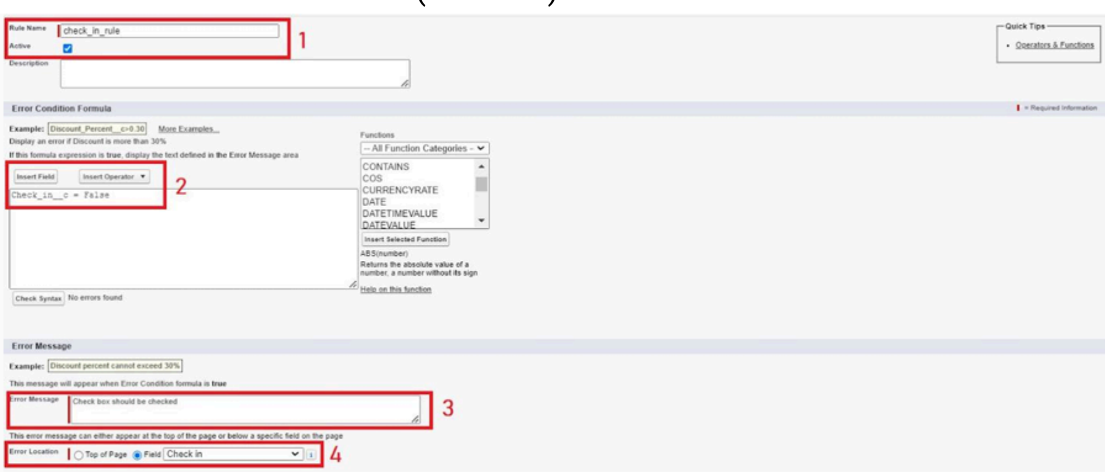
6. Select error location as field(Advance payment for 1month)



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)



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.

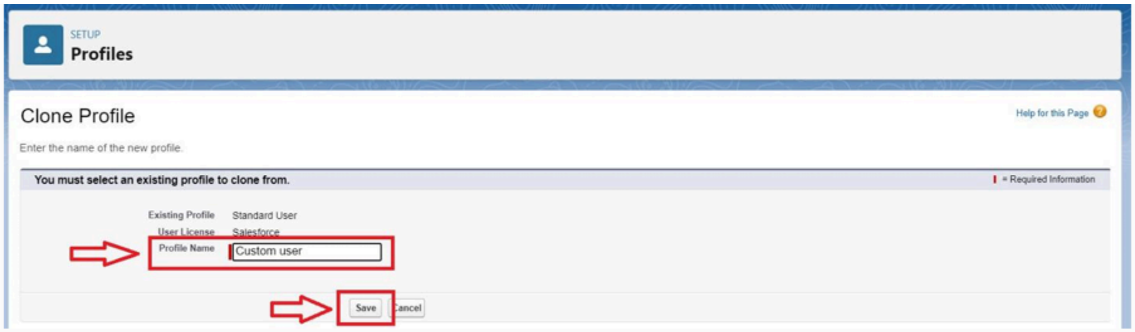
2. Custom Profiles:

Custom ones defined by us.

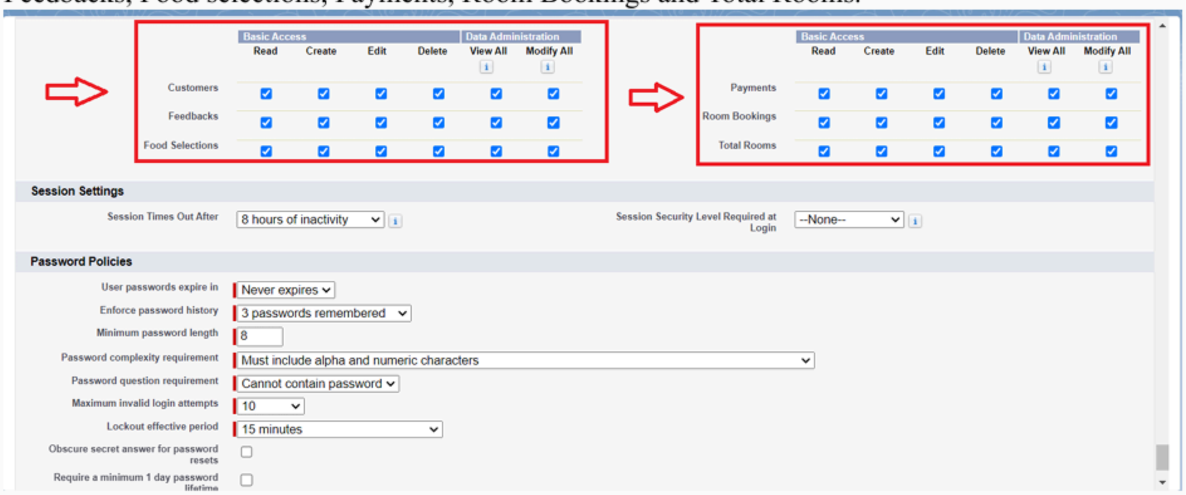
They can be deleted if there are no users assigned with that particular one.

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.



3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give All access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.



5. Scroll down and Click on Save.

Roles

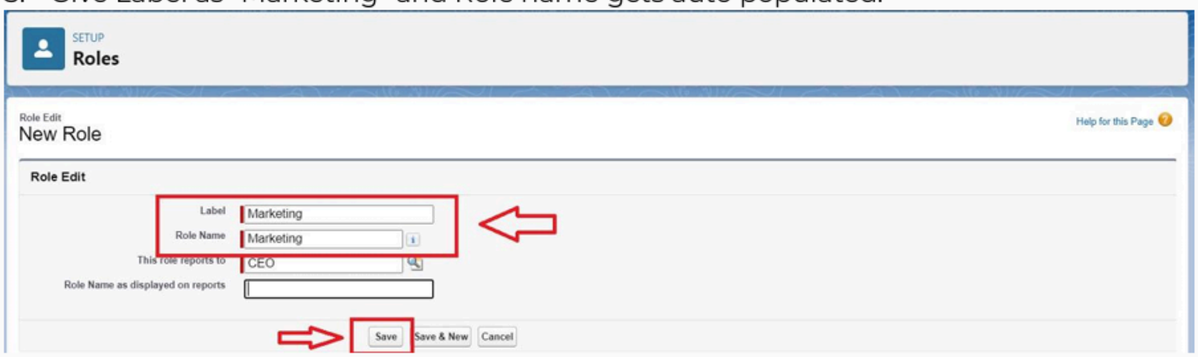
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Marketing Role

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

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

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



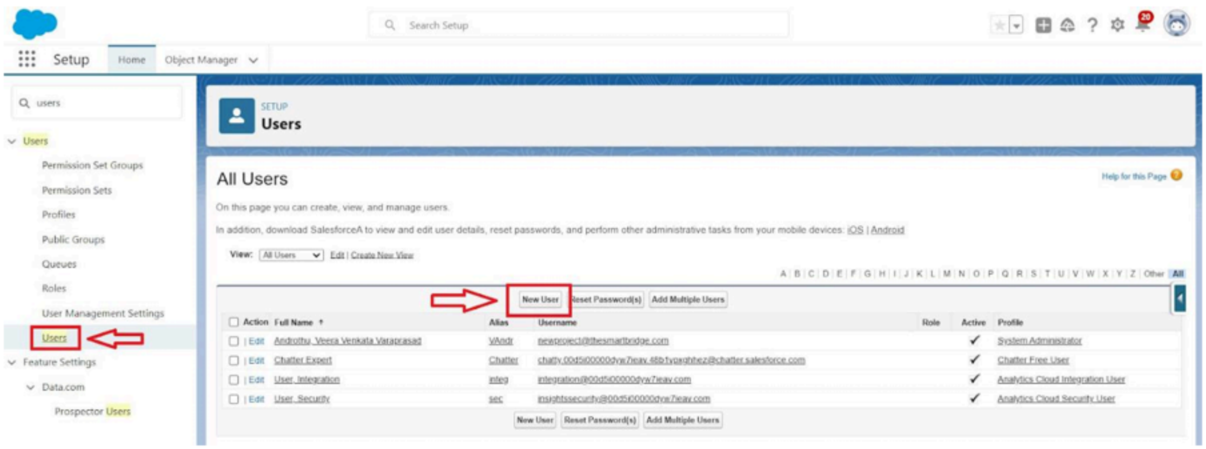
4. Then click on Save.

Users

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

Create User

1.Go to setup > type users in quick find box > select users > click New user.



2.Fill in the fields

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

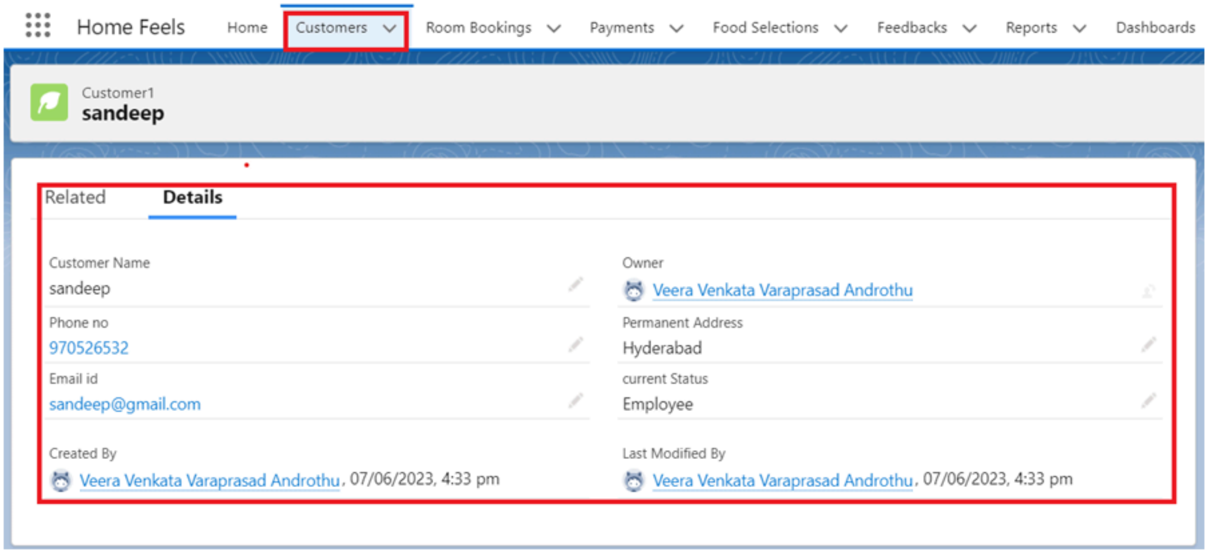
View a Record (Customers)

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

2. Search Home Feels & click on it.

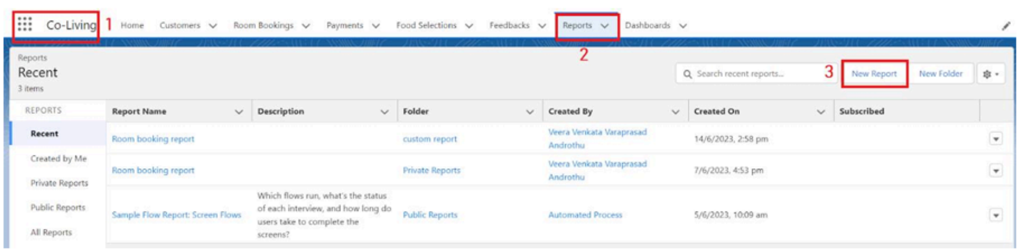
3. Click on Customer Tab.

4. Click on any record name. you can see the details of the Customer.

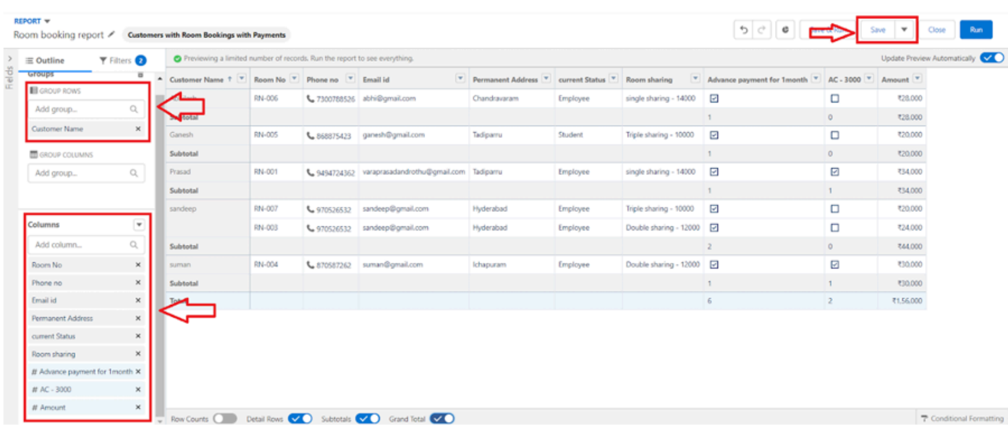


Create Report

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.



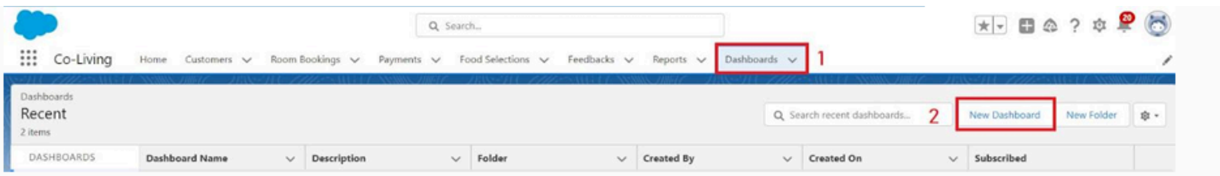
6. Save or run it.

Dashboards

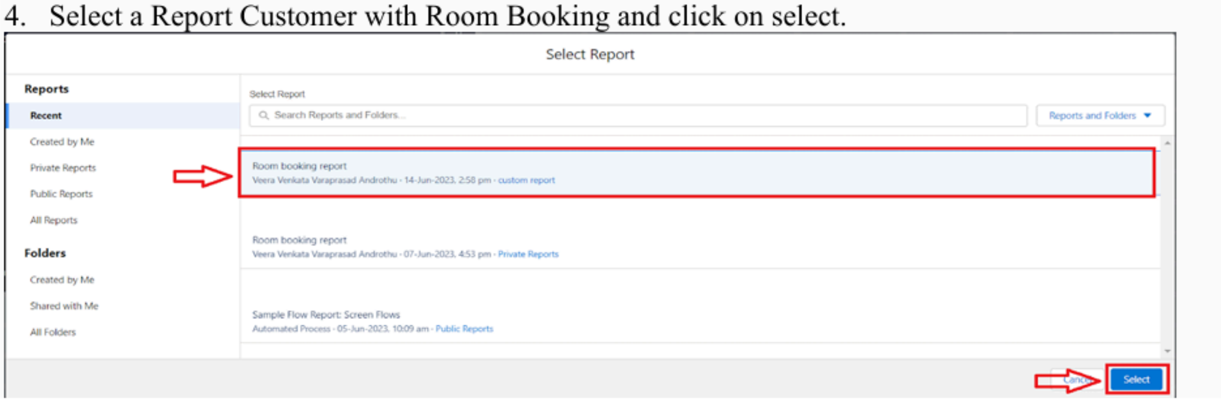
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

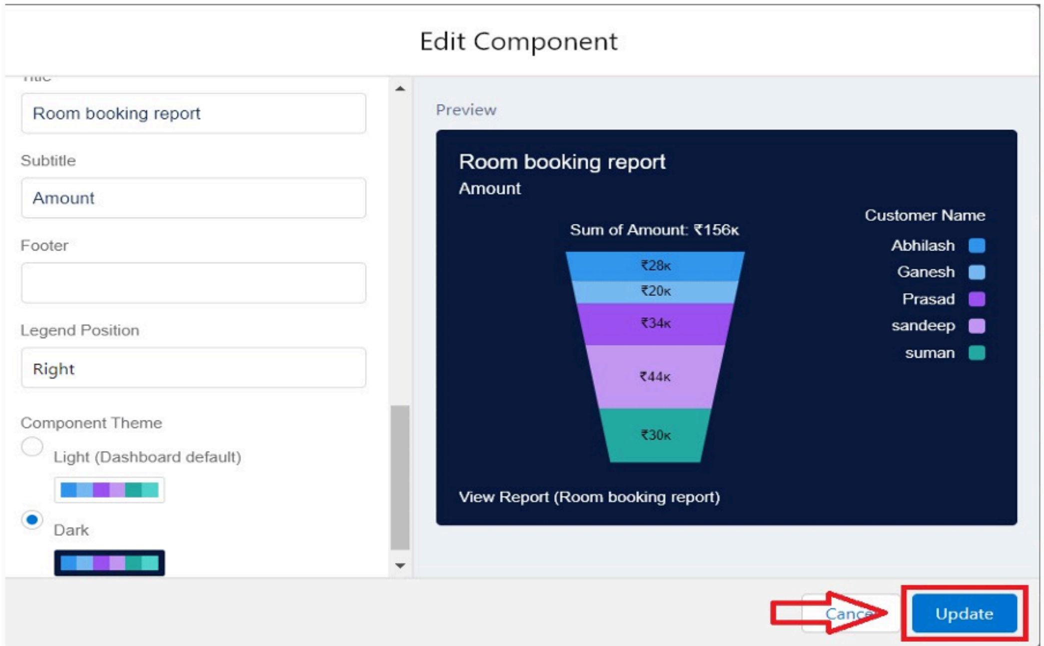
Create Dashboard

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.





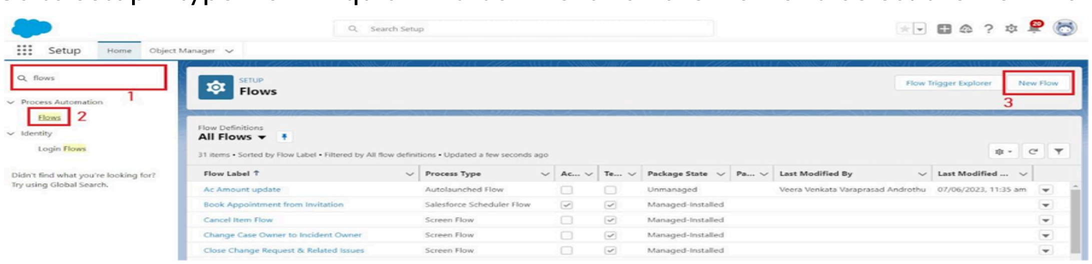
5. Click Add then click on Save and then click on Done.

Flows

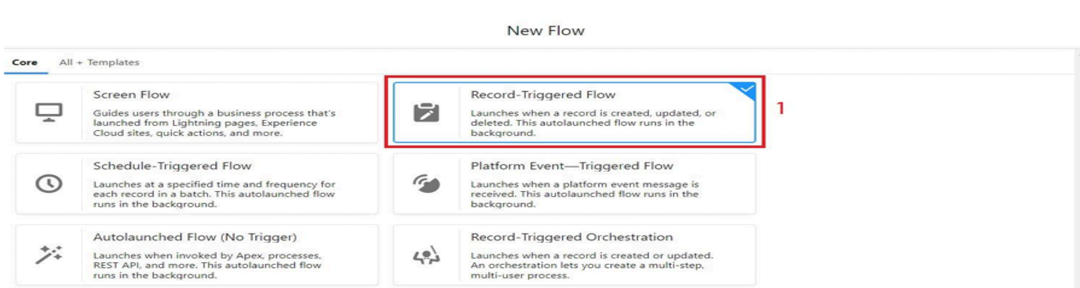
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Create a Flow

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

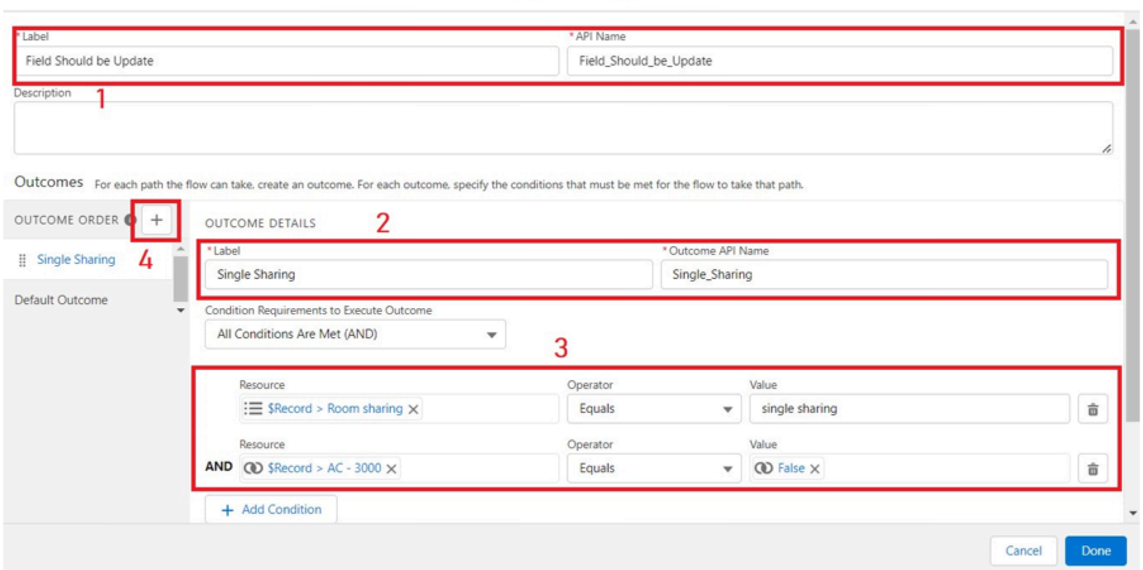


2.Select the Record-triggered flow and Click on Create.

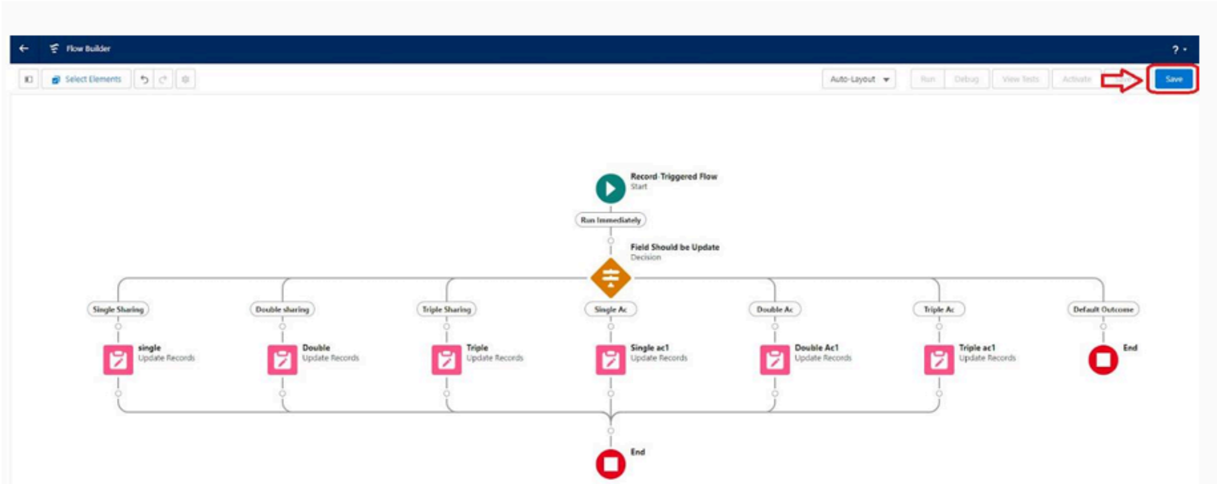


3.Select the Object as a Room Booking in the Drop down list.
4.Select the Trigger Flow when: “A record is Created or Updated”.
5.Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
6.Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the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

New Decision



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.