A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING

by

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ABSTARCT

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

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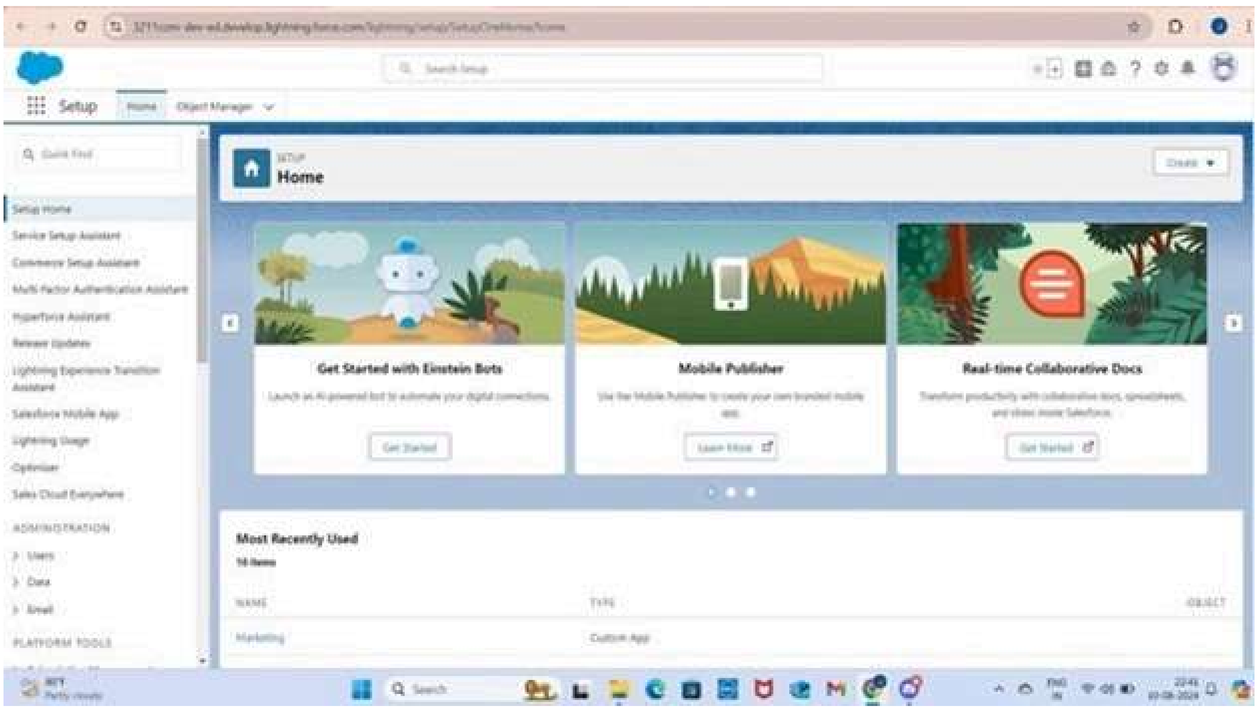
TASK 1:CREATING DEVELOPER ACCOUNT

Creating a developer org in salesforce
1.Go to https://developer.salesforce.com/signup
2.On the sign up form,enter the deatils given.
3.Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
4.Click on Verify Account
5. Give a password and answer a security question and click on change password.
6. when you will redirect to your salesforce setup page as given in the below.



TASK 2:CREATING OBJECTS

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:

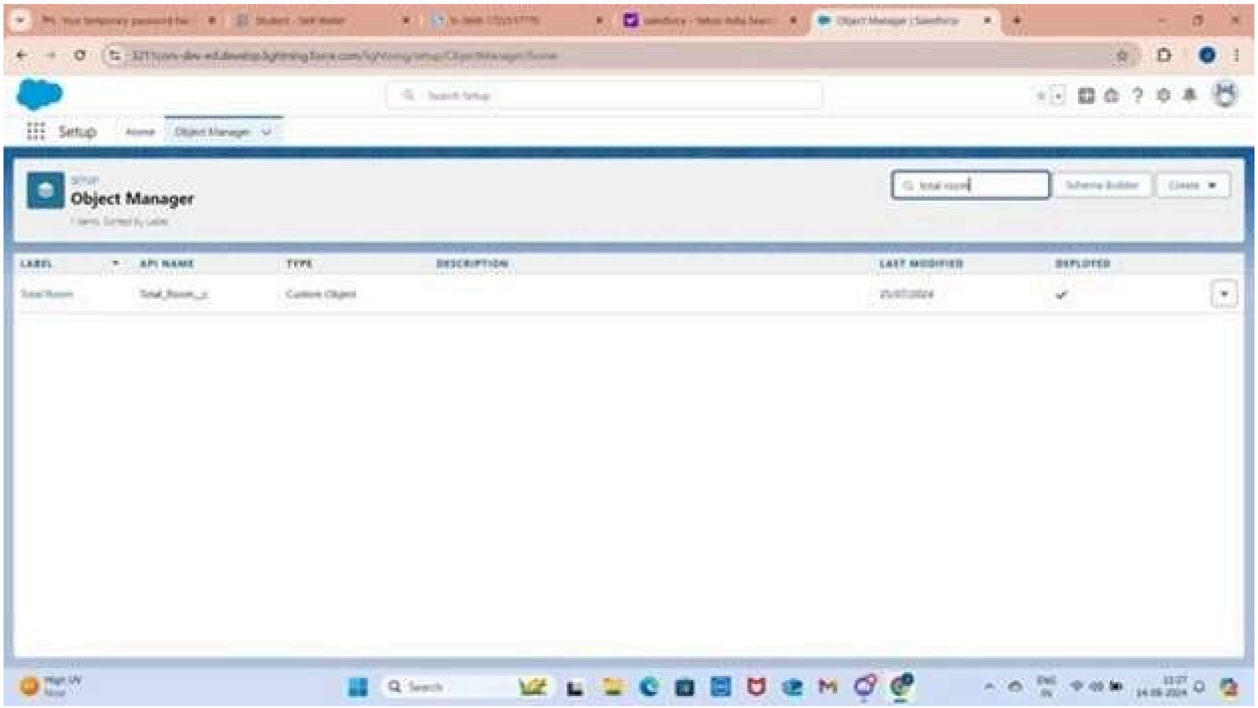
1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

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

Steps to Create a Custom Object for Total Rooms:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Total Room ".
4. Fill in the plural label as " Total Rooms ".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
11. Leave everything else as is, and click Save.

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


Setup
Object Manager
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Total Room
Total_Room__c
Custom Object
Schema Builder
Create

3 CREATING TABS

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

Types of Tabs:

1. **Custom Tabs**:
   - **Definition**: Custom object tabs are the user interface for custom applications that you build in Salesforce.com. They look and behave like standard Salesforce.com tabs such as Accounts, Contacts, and Opportunities.
2. **Web Tabs**:
   - **Definition**: Web Tabs are custom tabs that display web content or applications embedded in the Salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the Salesforce.com application.
3. **Visualforce Tabs**:
   - **Definition**: Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard Salesforce.com tabs such as Accounts, Contacts, and Opportunities.
4. **Lightning Component Tabs**:
   - **Definition**: Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.
5. **Lightning Page Tabs**:
   - **Definition**: Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Steps to create a Tab for Total Rooms:
1.Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)
2.Select Object (Total Rooms) > Select the tab style.
3.Next (Add to profiles page) keep it as default
4.Next (Add to Custom App) keep it as default & Save.
Note: Follow the smae steps to create remaining objects.

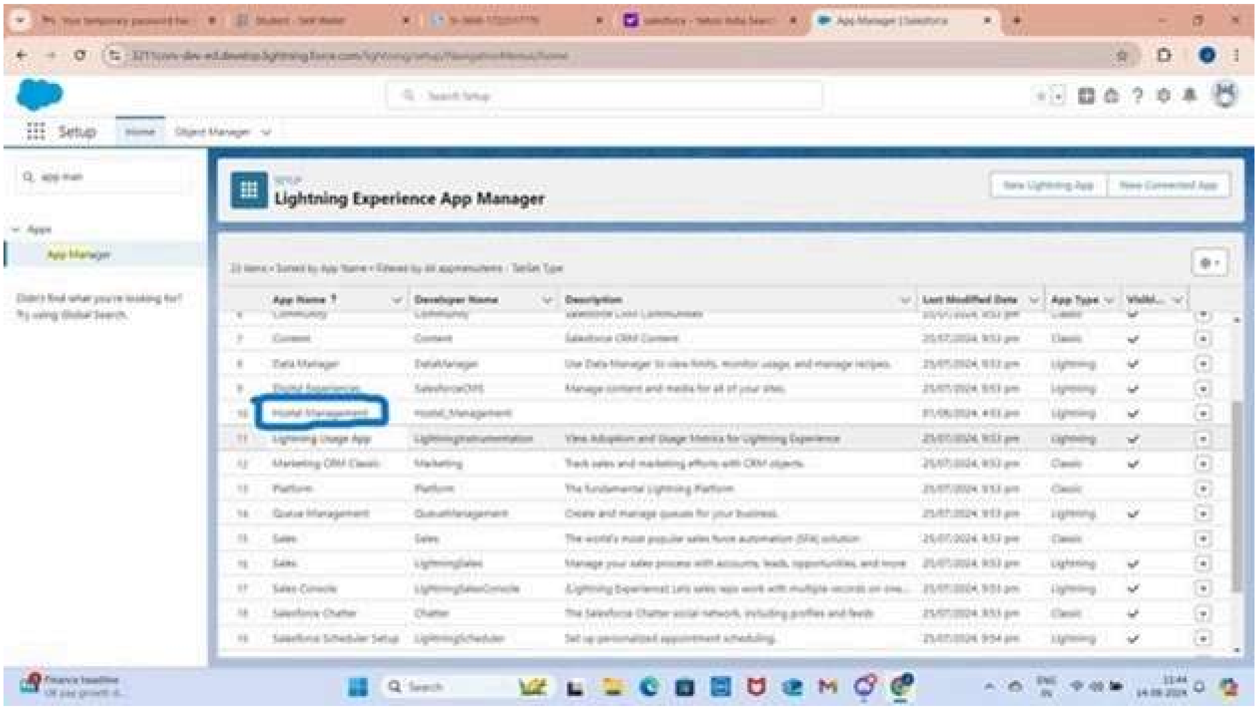
The Lightning App

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

Steps To create a Lightning app page:

1. Go to setup page > search “app manager” in Quick Find > select “App Manager” > click on New Lightning App.
2. Fill the app name in App Details and Branding > Next > (App Option Page) keep it as default > Next > (Utility Items) keep it as default > Next.
3. To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers1, Room Booking, Payments1, Food Selection, Feedbacks, Reports, and Dashboards) from the search bar and move them using the arrow button > Next.
4. To Add User Profiles:
    - Search profiles (System Administrator) in the search bar > click on the arrow button > Save & Finish.

4.CREATING LIGHTNING APP

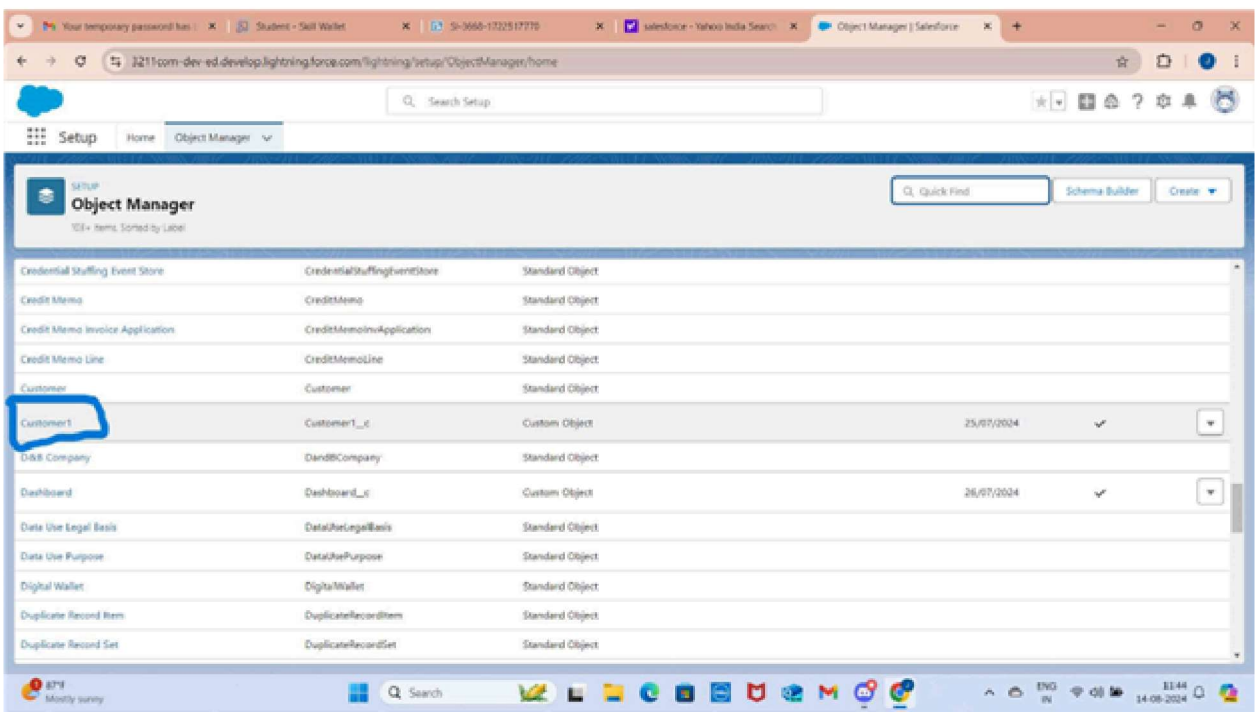


5.FIELDS & RELATIONSHIPS
Types of Fields

1.Standard Fields: As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task.
2.Custom Fields: On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements.

Steps to create Fields for Customer1 Object:
Go to setup > click on Object Manager > type object name (Customer1) in search bar > click on the object.

- Now click on “Fields & Relationships” > New
- Select Data Type as a “Phone”
- Click on Next
- Fill the Above as following:
    - Field Label: Phone no
    - Field Name: gets auto generated
- Click on Next > Next > Save and New.



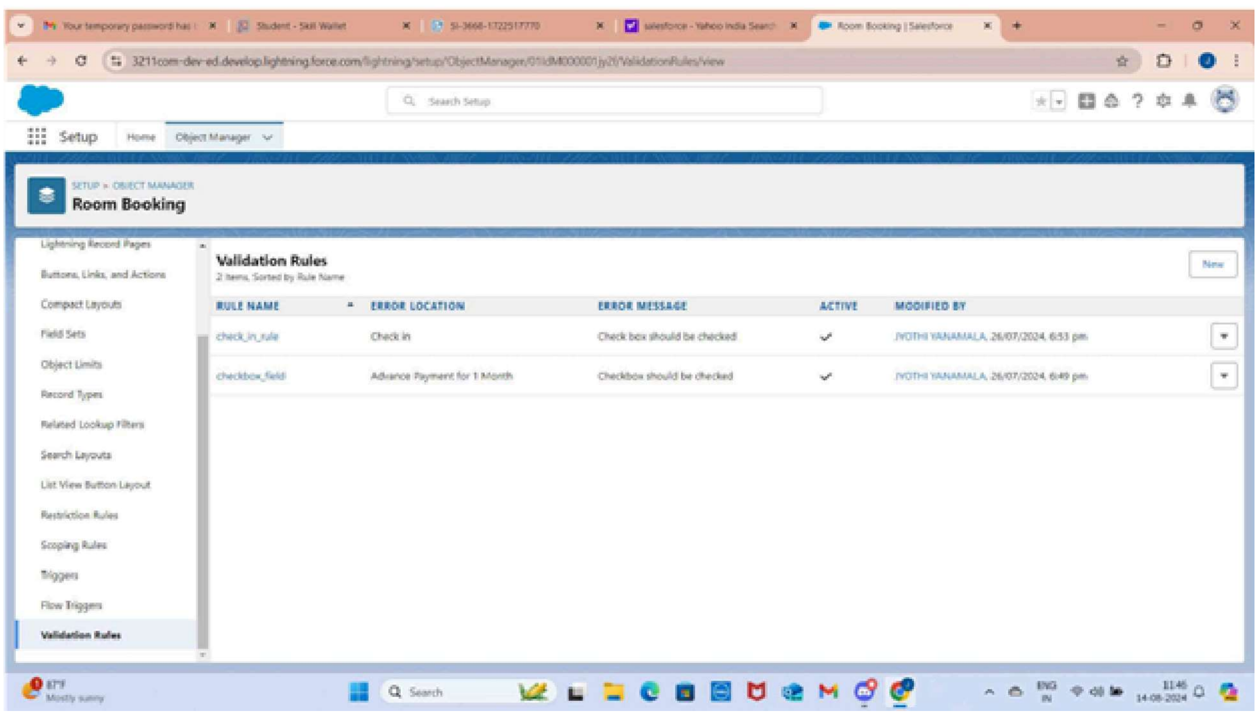
6 VALIDATION RULE

Validation Rule

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

Create a Validation Rule for 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 Rules" at the top > New.
3. Enter Rule Name: **"checkbox field"** and make the validation rule **Active**.
4. Enter the formula in the Formula box: `Advance_payment_for_1month__c = false` and check for syntax errors.
5. Enter the Error Message: **"Checkbox should be checked"**
6. Select Error Location as Field: **(Advance_payment_for_1month)**
7. Click on **Save**.



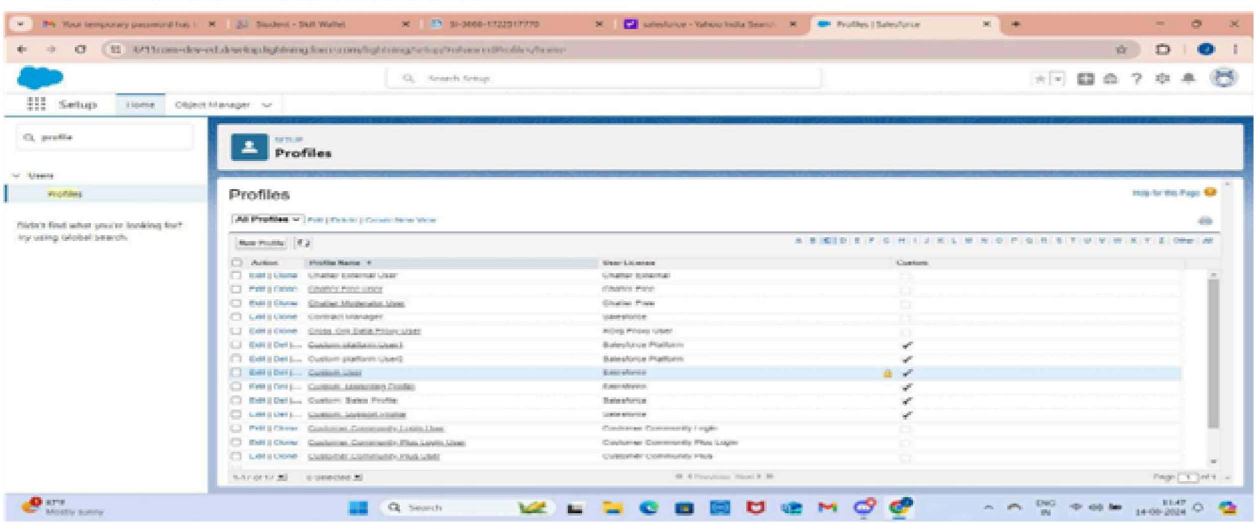
7 PROFILES

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

Types of profiles in salesforce:
1. Standard profiles
2.Custom Profiles

To Create a New Profile:

1. Go to **Setup** > type **Profiles** in the Quick Find box > click on **Profiles** > clone the desired profile (e.g., Standard User).
2. Enter Profile Name: **Custom User** > **Save**.
3. While still on the profile page, click **Edit**.
4. Scroll down to **Custom Object Permissions** and give **All Access** permissions for:
    - Customers
    - Feedbacks
    - Food Selections
    - Payments
    - Room Bookings
    - Total Rooms
5. Scroll down and click **Save**.



ROLES:

Roles:

A role in Salesforce defines a user's visibility access at the record level. Roles are used to specify the types of access that people in your Salesforce organization can have to data.

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 the **CEO** role.
3. Give **Label** as **"Marketing"** and the **Role Name** gets auto-populated.
4. Click on **Save**.

Receptionist Role

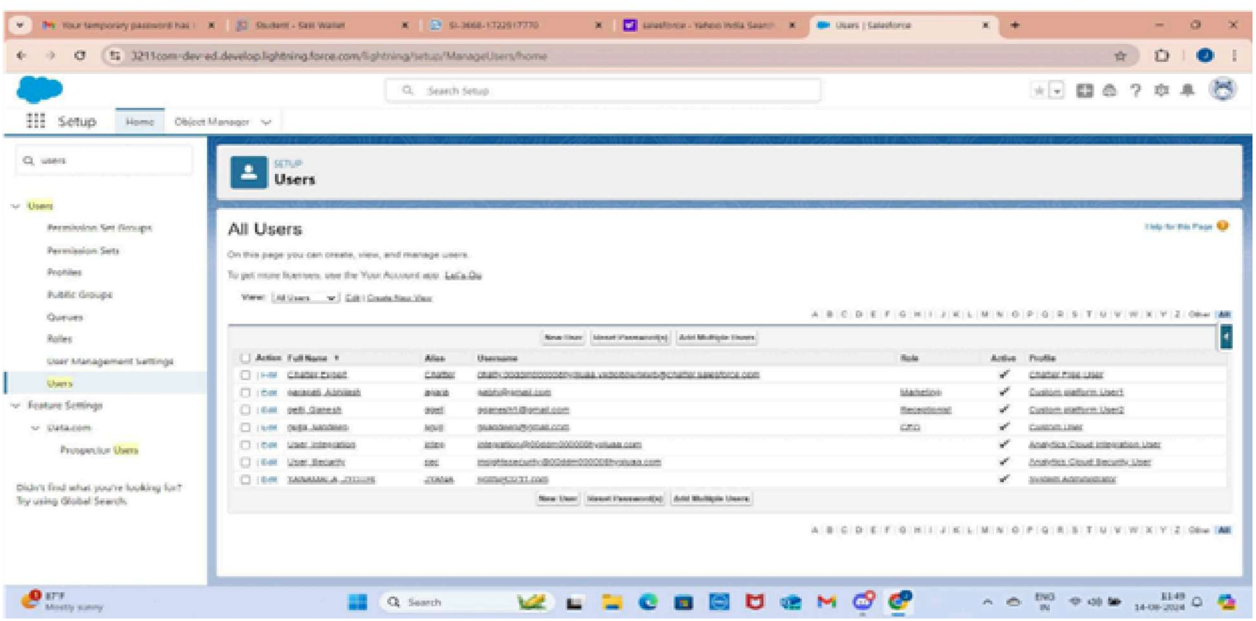
1. Go to **Quick Find** > Search for **Roles** > click on **Set Up Roles**.
2. Click on **Expand All** and click on **Add Role** under the **CEO** role.
3. Give **Label** as **"Receptionist"** and the **Role Name** gets auto-populated.
4. Click on **Save**.

9.USERS:
Users

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

Create User

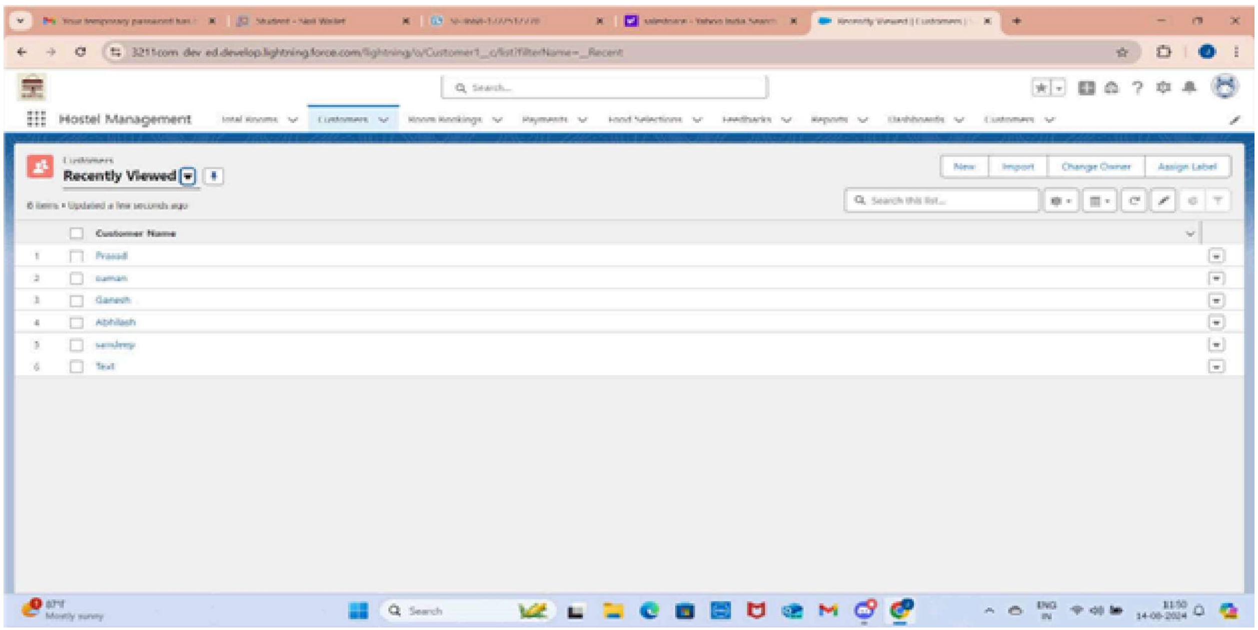
1. Go to **Setup** > type **Users** in the Quick Find box > select **Users** > click **New User**.
2. Fill in the fields:
    - **First Name**: Sandeep
    - **Last Name**: Gujja
    - **Alias**: Give an Alias Name
    - **Email ID**: Give your Personal Email ID
    - **Username**: Username should be in this form: text@text.com
    - **Nickname**: Give a Nickname
    - **Role**: CEO
    - **User License**: Salesforce
    - **Profile**: Custom User
3. Click **Save**.



10. USER ADOPTION:

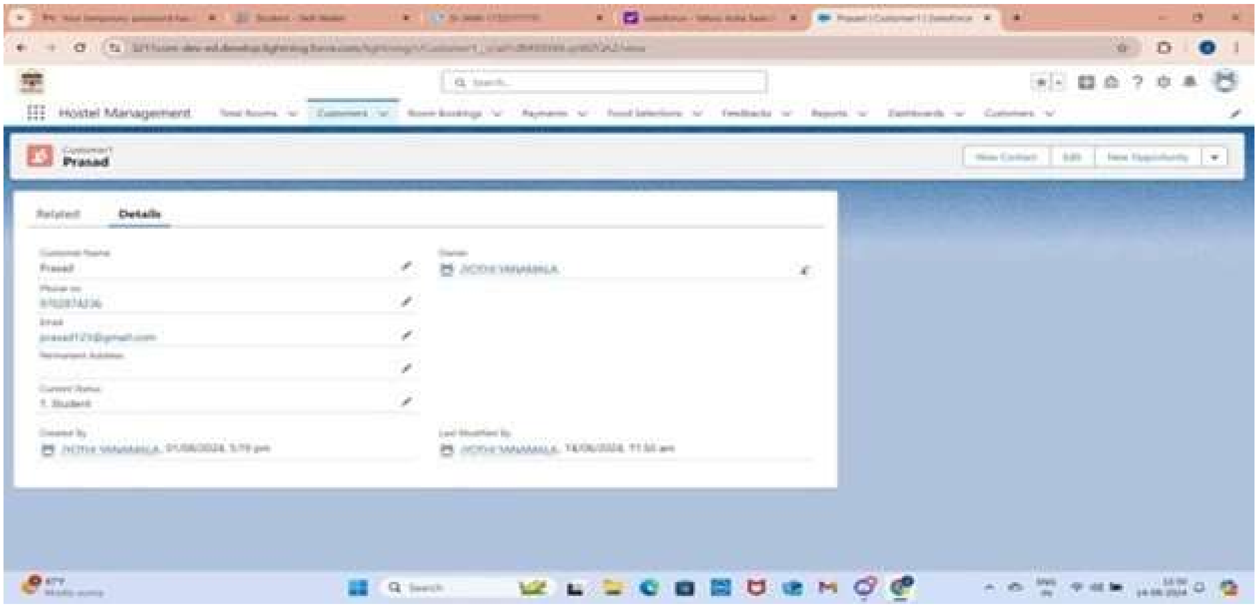
Create a Record (Customers)

1. Click on **App Launcher** on the left side of the screen.
2. Search for **Home Feels** and click on it.
3. Click on the **Customers** tab.
4. Click **New** and fill in the details.
5. Click **Save**.



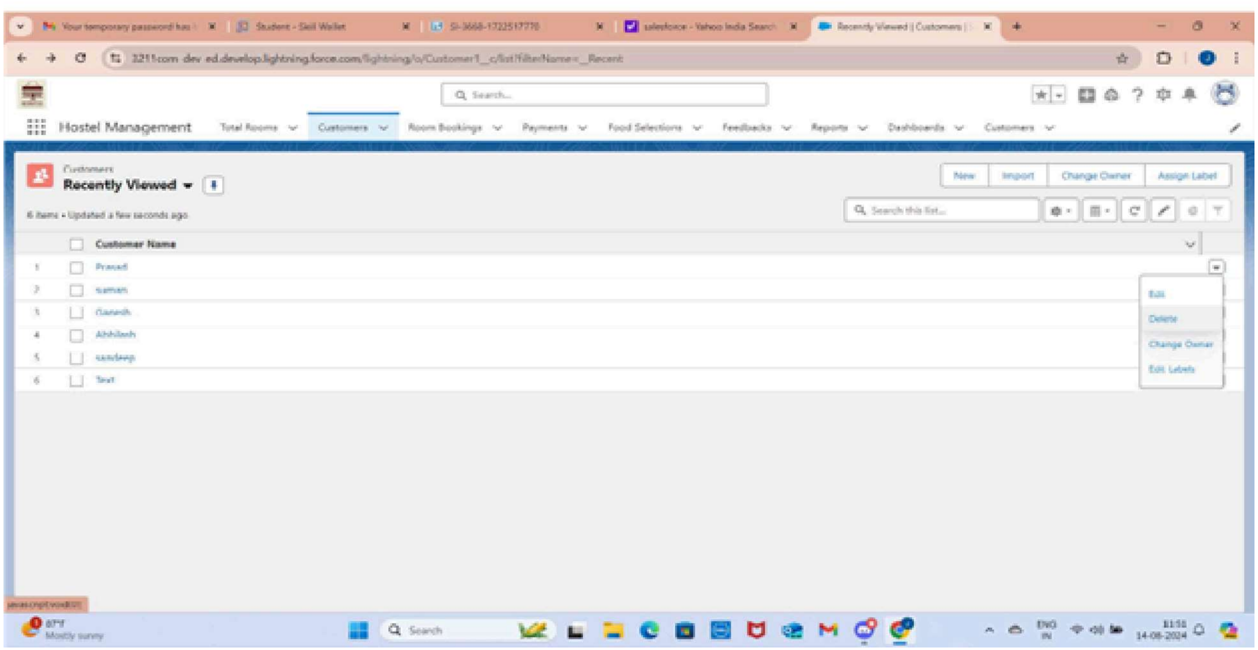
View a Record (Customers)

1. Click on **App Launcher** on the left side of the screen.
2. Search for **Home Feels** and click on it.
3. Click on the **Customers** tab.
4. Click on any record name. You can see the details of the customer.



Delete a Record (Customers)

1. Click on **App Launcher** on the left side of the screen.
2. Search for **Home Feels** and click on it.
3. Click on the **Customers** tab.
4. Click on the arrow at the right-hand side of the particular record.
5. Click **Delete** and then click **Delete** again to confirm.



1 REPORTS

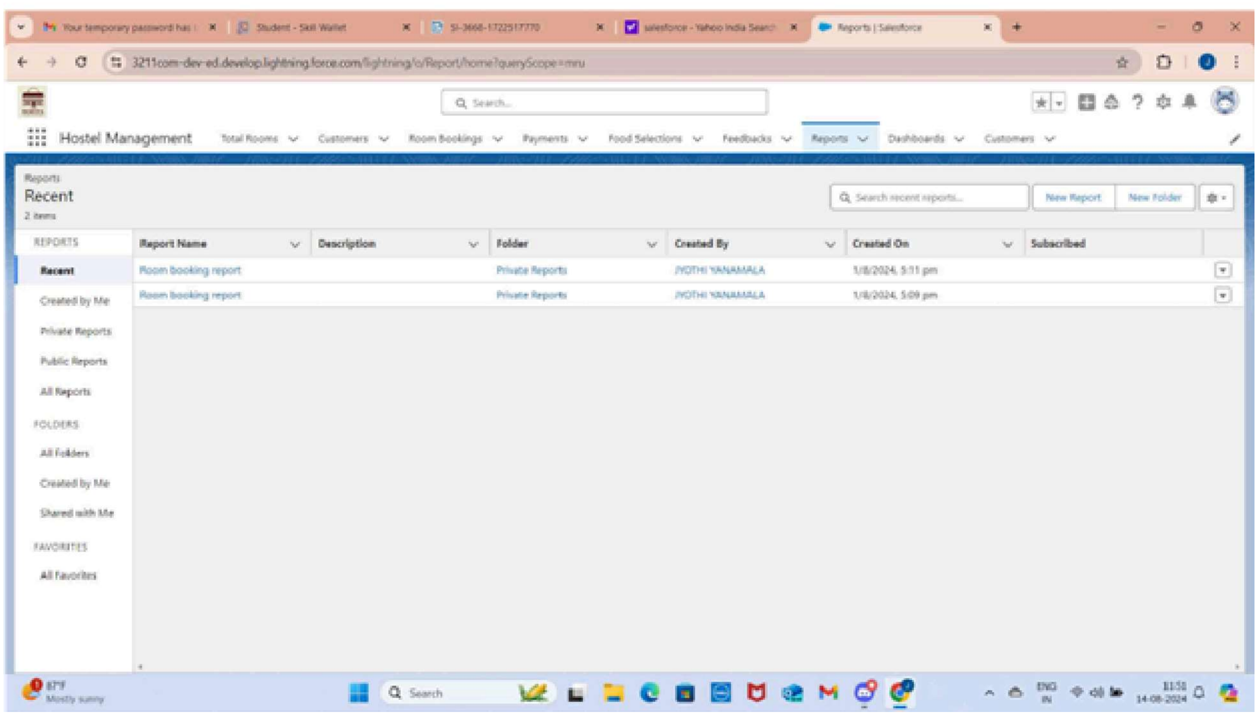
Reports

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Create Report

1. Go to the app > click on the **Reports** tab.
2. Click **New Report**.
3. Select report type from category or from report type panel or from search panel "Customers with Room Bookings with Total Rooms" > click on **Start Report**.
4. Customize your report
   - Add fields from the left pane as shown below
5. Save or run it.

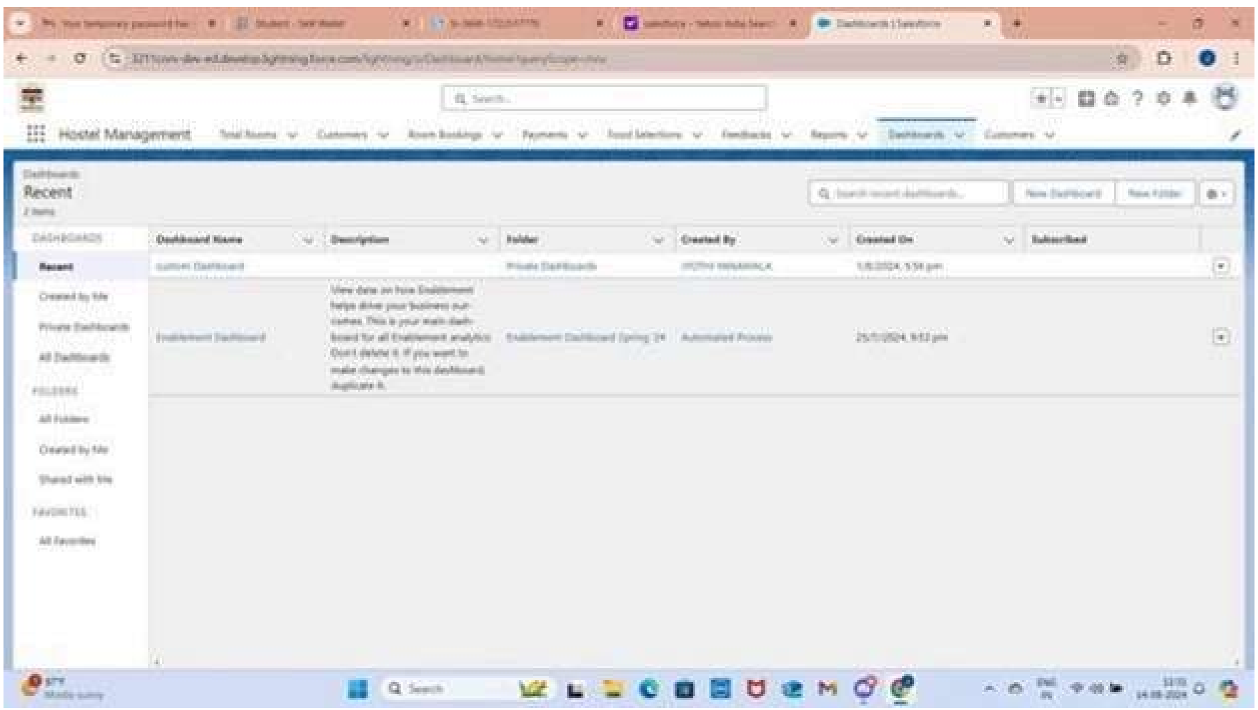


Dashboards

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 **Dashboards** tab 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**.



3 FLOWS

Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps.

Why Create a Flow:

To automatically populate the Amount field based on the selection of the Room sharing and AC fields, ensuring that the Amount is generated automatically.

Create a Flow

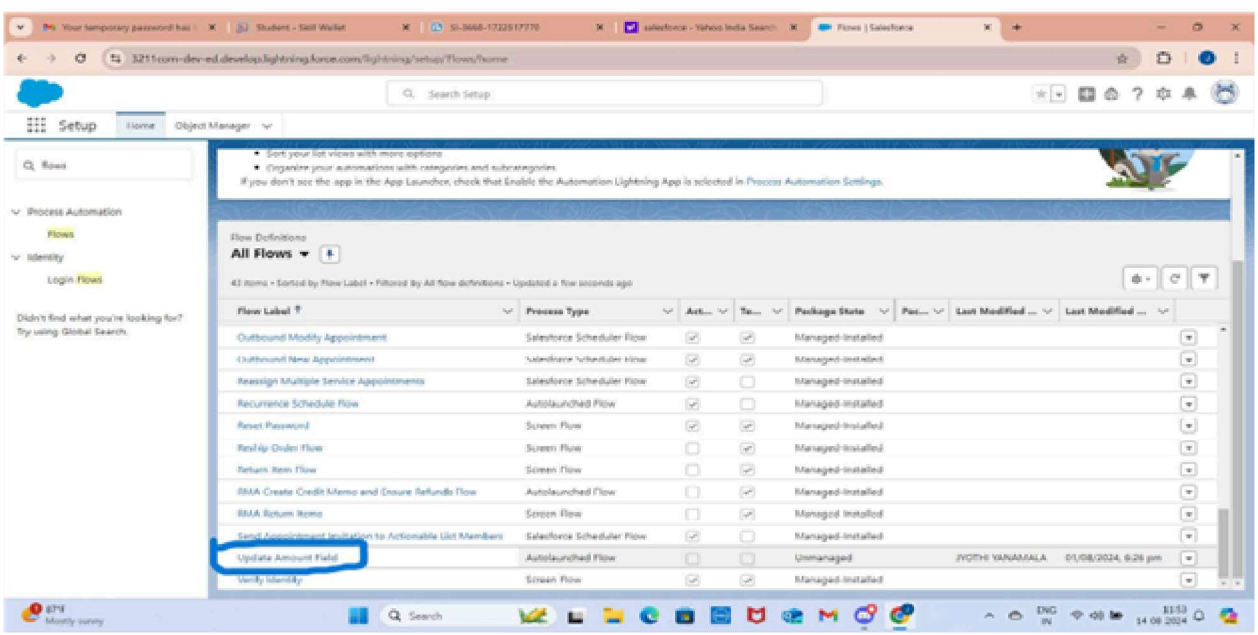
1. Go to **Setup** > type **Flow** in the Quick Find box > click on **Flows** and select **New Flow**.
2. Select **Record-Triggered Flow** and click **Create**.
3. Select the **Object** as **Room Booking** from the drop-down list.
4. Select the **Trigger Flow When**: "A record is Created or Updated".
5. Select **Optimize the Flow For**: "Actions and Related Records" and click **Done.**
6. Under the Record-Triggered Flow, click on the **"+" Symbol** and in the drop-down list, select **"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.**
9. Click on **"Add Condition"**:
    - **Resource**: Select **Record.AC-3000**.
    - **Operator**: Select **Equals**.
    - **Value**: Select **False**.
10. Click on the **"+" Symbol** in the Outcome Order.
11. Enter the Outcome Details:
    - **Label**: Double sharing
    - **Outcome API Name**: Gets automatically generated.
    - **Resource**: Select **Record.Room sharing**.
    - **Operator**: Select **Equals**.
    - **Value:** Select **Double sharing**.

12. Click on **"Add Condition"**:
    - **Resource**: Select **Record.AC-3000**.
    - **Operator**: Select **Equals**.
    - **Value**: Select **False**.
13. Click on the **"+" Symbol** in the Outcome Order.
14. Enter the Outcome Details:
    - **Label**: Triple sharing
    - **Outcome API Name**: Gets automatically generated.
    - **Resource**: Select **Record.Room sharing**.
    - **Operator**: Select **Equals**.
    - **Value**: Select **Triple sharing**.
15. Click on **"Add Condition"**:
    - **Resource**: Select **Record.AC-3000**.
    - **Operator**: Select **Equals**.
    - **Value**: Select **False**.
16. Click on the **"+" Symbol** in the Outcome Order.
17. Enter the Outcome Details:
    - **Label**: Single Ac
    - **Outcome API Name**: Gets automatically generated.
    - **Resource**: Select **Record.Room sharing**.
    - **Operator**: Select **Equals**.
    - **Value**: Select **Single sharing**.
18. Click on **"Add Condition"**:
    - **Resource**: Select **Record.AC-3000**.
    - **Operator**: Select **Equals**.
    - **Value**: Select **True**.
19. Click on the **"+" Symbol** in the Outcome Order.
20. Enter the Outcome Details:
    - **Label**: Double Ac
    - **Outcome API Name**: Gets automatically generated.
    - **Resource**: Select **Record.Room sharing**.
    - **Operator**: Select **Equals**.
    - **Value**: Select **Double sharing**.
21. Click on **"Add Condition"**:
    - **Resource**: Select **Record.AC-3000**.
    - **Operator**: Select **Equals**.
    - **Value**: Select **True**.

22. Click on the **"+" Symbol** in the Outcome Order.
23. Enter the Outcome Details:
    - **Label**: Triple Ac
    - **Outcome API Name**: Gets automatically generated.
    - **Resource**: Select **Record.Room sharing**.
    - **Operator**: Select **Equals**.
    - **Value**: Select **Triple sharing**.
24. Click on **"Add Condition"**:
    - **Resource**: Select **Record.AC-3000**.
    - **Operator**: Select **Equals**.
    - **Value**: Select **True**.
25. Click on **Done**.
26. Click on the **"+" Symbol** under **Single sharing** and select **"Update Records"** from the drop-down list.
27. Enter the update records details:
    - **Label**: Single
    - **API Name**: Gets automatically generated.
    - Under the **Set Field Values for the Room Booking Record**:
        - **Field**: Amount
        - **Value**: 28000
28. Click **Done**.
29. Enter the update records details:
    - **Label**: Double
    - **API Name**: Gets automatically generated.
    - Under the **Set Field Values for the Room Booking Record**:
        - **Field**: Amount
        - **Value**: 24000
30. Click **Done**.
31. Enter the update records details:
    - **Label**: Triple
    - **API Name**: Gets automatically generated.
    - Under the **Set Field Values for the Room Booking Record**:
        - **Field**: Amount
        - **Value**: 20000
32. Click **Done.**
33. Enter the update records details:
    - **Label**: Single ac1

- **API Name**: Gets automatically generated.
- Under the **Set Field Values for the Room Booking Record**:
  - **Field**: Amount
  - **Value**: 34000

34. Click **Done**.
35. Enter the update records details:
    - **Label**: Double ac1
    - **API Name**: Gets automatically generated.
    - Under the **Set Field Values for the Room Booking Record**:
      - **Field**: Amount
      - **Value**: 30000
36. Click **Done**.
37. Enter the update records details:
    - **Label**: Triple ac1
    - **API Name**: Gets automatically generated.
    - Under the **Set Field Values for the Room Booking Record**:
      - **Field**: Amount
      - **Value**: 26000
38. Click **Done**.
39. The Flow will form like this. Click **Save**.
40. Enter the **Flow Label**: Update Amount Field, **Flow API Name**: Gets automatically generated and click **Save**.



Test the Flow

1. Go to **App Launcher** and search for **Co-living,** then select the app.
2. In the **Co-living** app, click on the **Room Sharing** tab and click **New**.
3. Enter the details:
   - **Name**
   - **Room Sharing**
   - **AC-3000**
   - **Advance Payment for 1 Month**
4. Note: The **Amount** field should be empty before saving the record.
5. After saving the record, the **Amount** field will be populated automatically based on the flow configurations.