

# 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

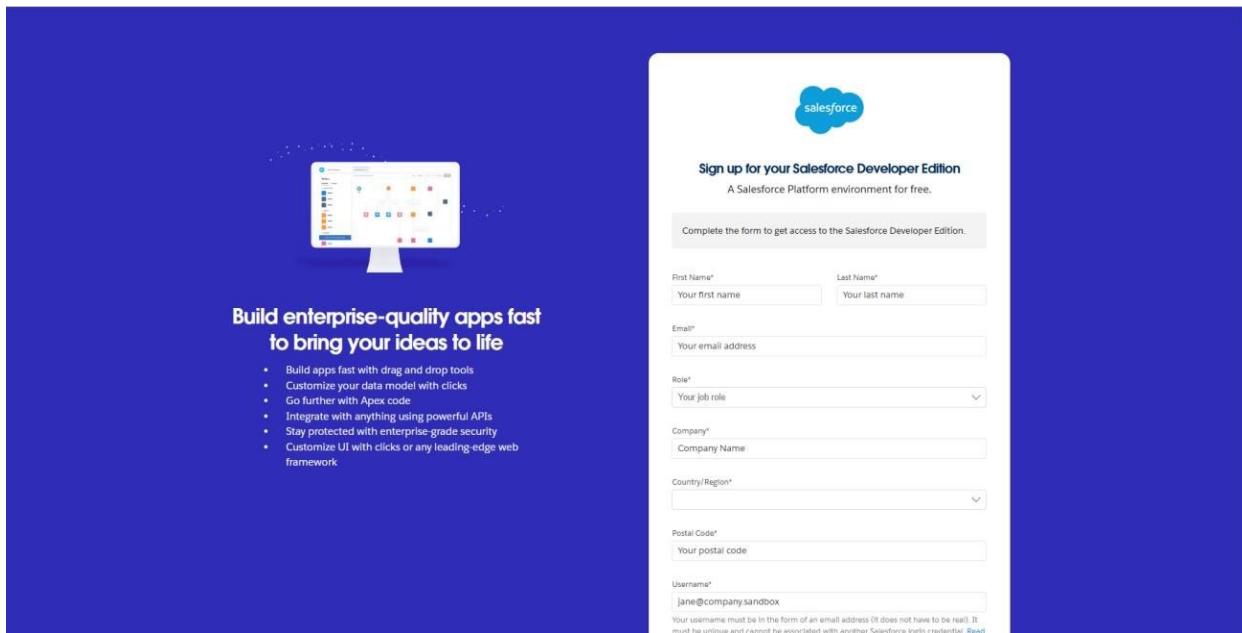
- a. **Search and Filter:** Users can search for available rooms by date, room type, and sharing options.
- b. **Booking Confirmation:** Once a booking is made, the user will receive a confirmation email with details of their booking.
- c. **Payment Reminders:** The application will send reminders to 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?

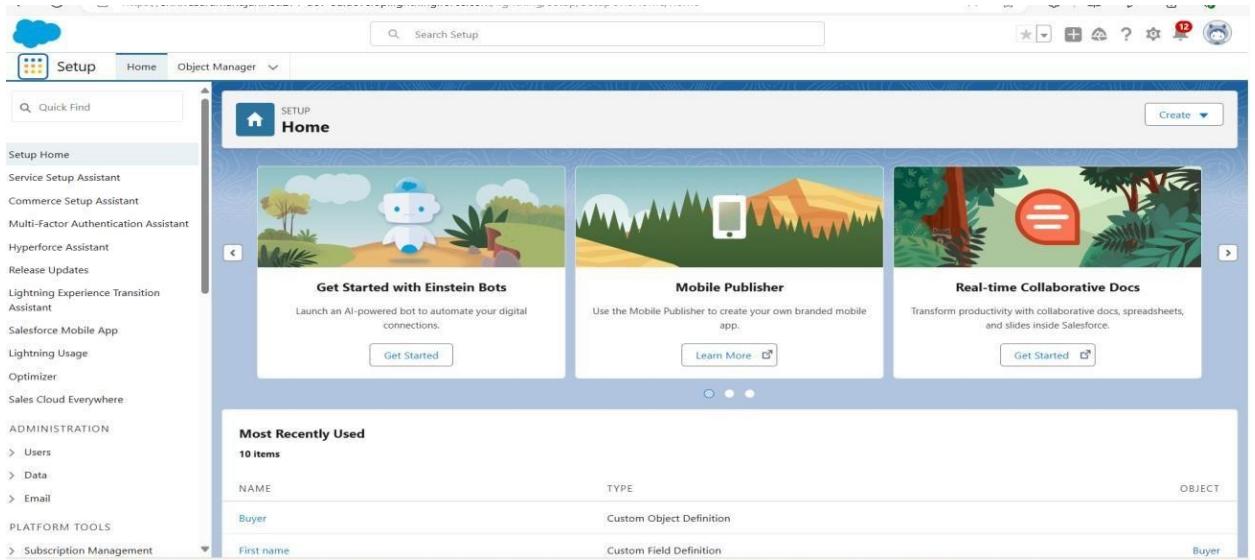
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate 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?

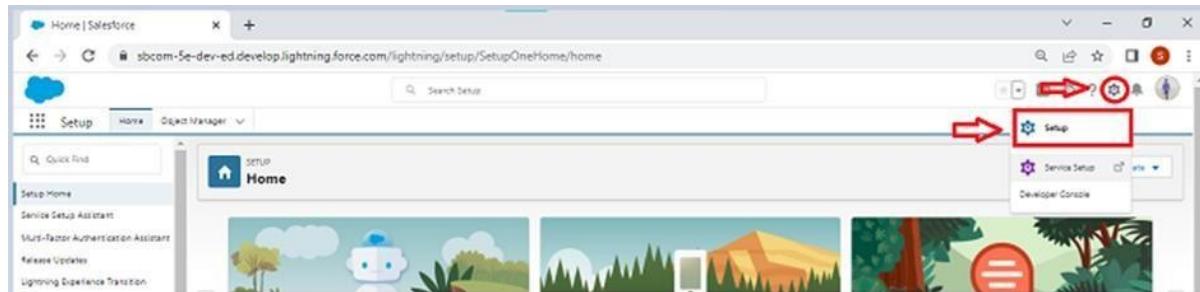
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

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 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.

Section	Field	Description
Custom Object Information	Label	Example: Account
	Plural Label	Example: Accounts
Record Name Label and Format	Record Name	Example: Account Name
	Description	(Text area)
Optional Features	Allow Reports	<input checked="" type="checkbox"/>
	Allow Activities	<input checked="" type="checkbox"/>
	Track Field History	<input type="checkbox"/>



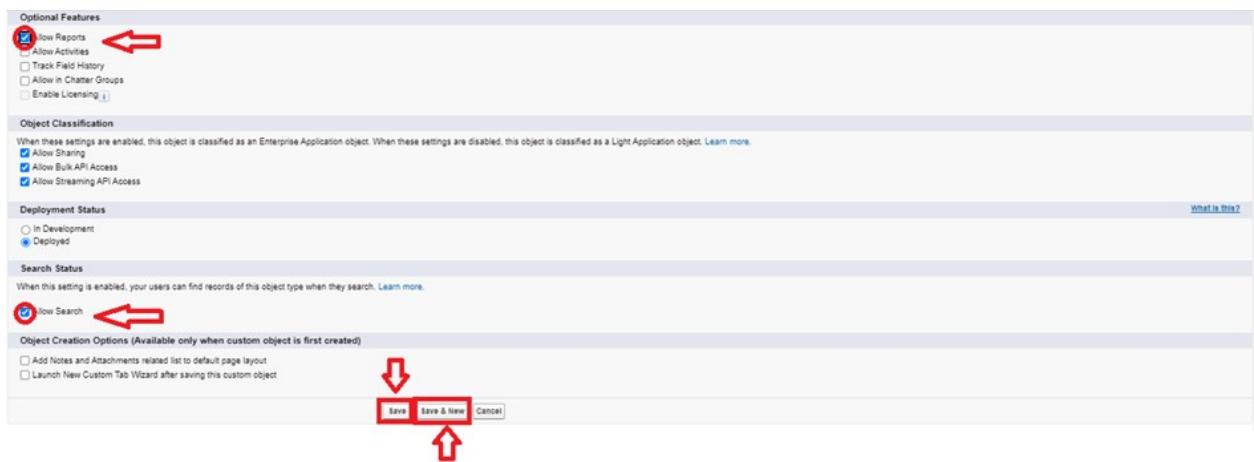
4. Click on Save.

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

To create an object:

- a. From the setup page Click on Object Manager Click on Create Click on Custom Object.1.Enter the label name Supplier
- b. Plural label name? Suppliers
- c. Fill in the label as "TotalRoom".
- d. Fill in the plural label as "TotalRooms".
- e. Record name: "Total No Of Rooms"
- f. Select the data type as "Text".
- g. In the Optional Features section, select Allow Reports and Track Field History.
- h. In the Deployment Status section, ensure Deployed is selected.
- i. In the Search Status section, select Allow Search.
- j. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

k. Leave everything else as is, and click Save.



**Create a custom object for Customer**

**Create a custom object for Room Booking**

**Create a custom object for Payment**

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Food Selection' is being created. The 'Details' tab is selected, showing the following configuration:

- Description:** Food Selection
- API Name:** Food\_Selection\_\_c
- Custom:** ✓
- Singular Label:** Food Selection
- Plural Label:** Food Selections

On the right side, under 'Edit' mode, the following settings are visible:

- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

On the left sidebar, other configuration options are listed: 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.

## Create a customobject for Food Selection

## Create a customobject for Feedback

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Feedback' is being created. The 'Details' tab is selected, showing the following configuration:

- Description:** Feedback
- API Name:** Feedback\_\_c
- Custom:** ✓
- Singular Label:** Feedback
- Plural Label:** Feedbacks

On the right side, under 'Edit' mode, the following settings are visible:

- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

On the left sidebar, other configuration options are listed: 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.

## 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:

**1. 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.

**2. 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.

**3. 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.

**4. Lightning Component Tabs :**

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

**5. Lightning Page Tabs :**

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs 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.

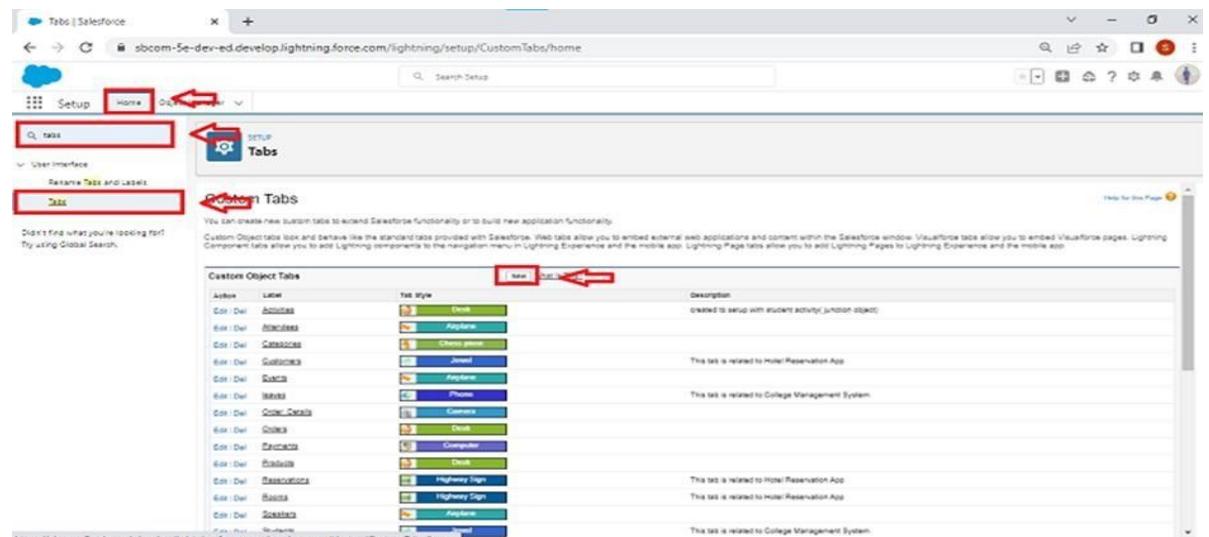
**Activity 1: Creating a Tab**

**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 object tab)



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

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

**Create a  
Tab for**

## **Custom**

**rsTo**

**create a**

**Tab:(Cus**

**tomers)**

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 asdefault> Next (Add to CustomApp) keep it as default > Save.

## **To create a Tab for Room Bookings**

To createa 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 asdefault ? Next (Add to Custom App) keep it as default ? Save.

## **Create a Tabs For Remaining Objects**

Now createthe 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 inone 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.

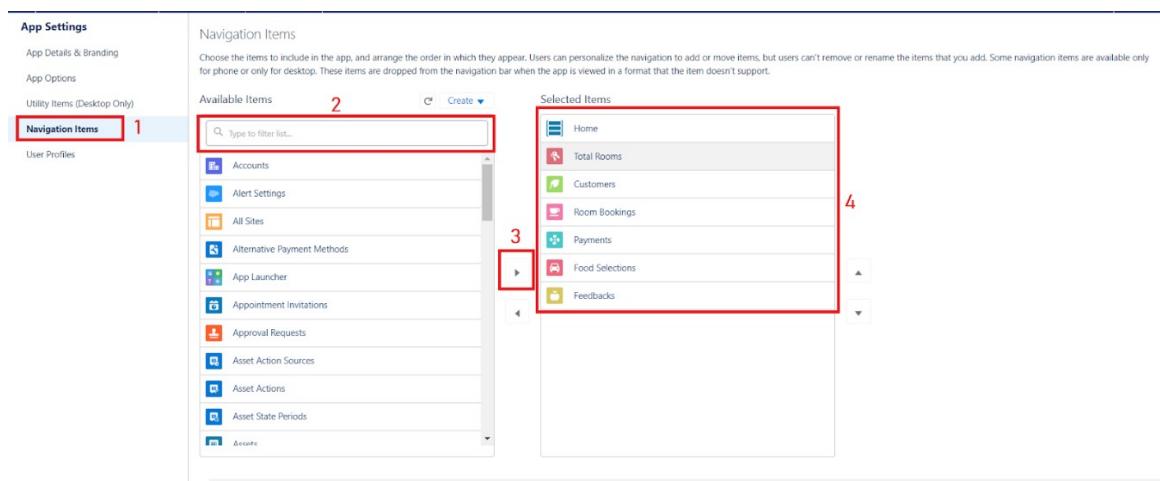
### **Activity 1: To create a lightningapp page:**

1.

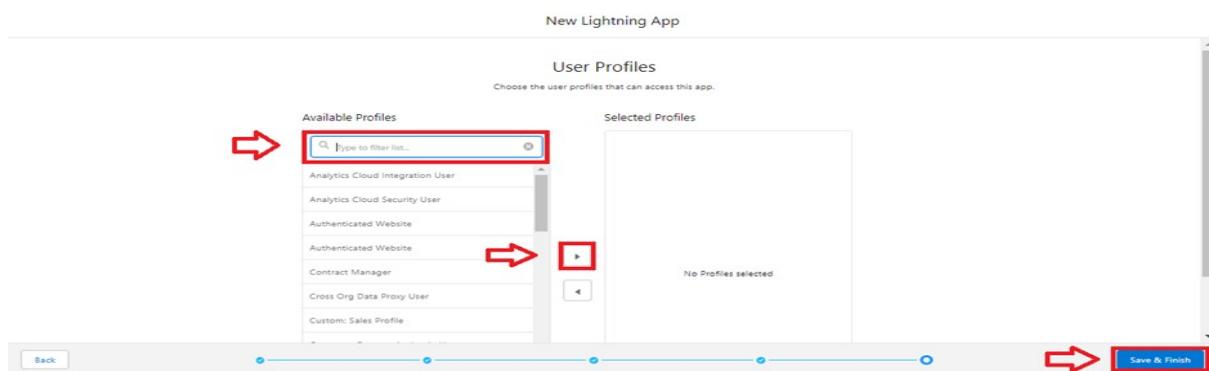
Go to setup page > search “app manager” in quick find > select

"app manager" > click on Newlightning 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 it using the arrow button > Next.



4. 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 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

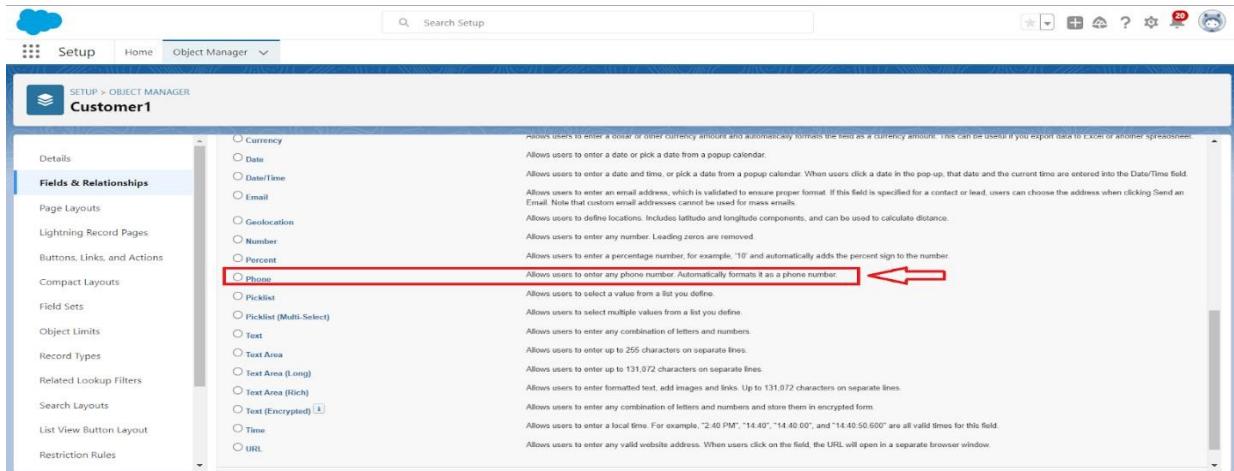
### **Custom Fields:**

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 depends on the user, and he can add/remove CustomFields of any given form.

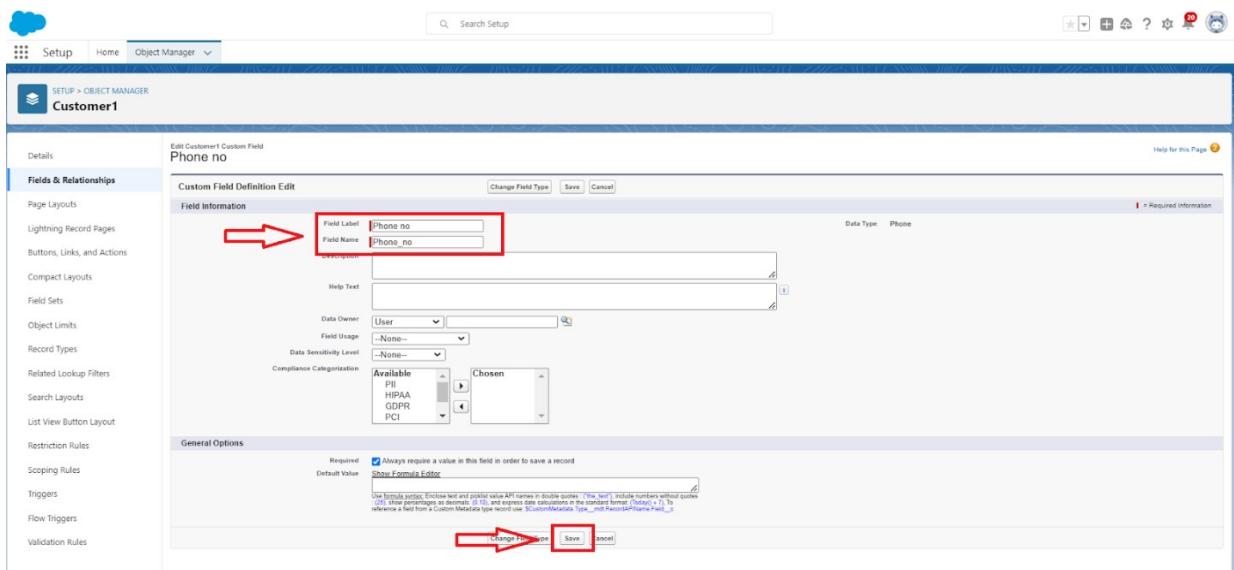
### **Activity 1: Creation of fields for the customer1 object**

#### **1. 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"



#### 4. Click on next



#### 5. Fillthe 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:
  - a. Field Label:Email

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

### **4. 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 as a “Picklist” and Click on Next
4. Fill the  
Above as  
following:  
Field  
Label:  
CurrentSta  
tus  
Value - Select enter values with each value separated by a new line
  - a. Student
  - b. Employee
  - c. 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:**

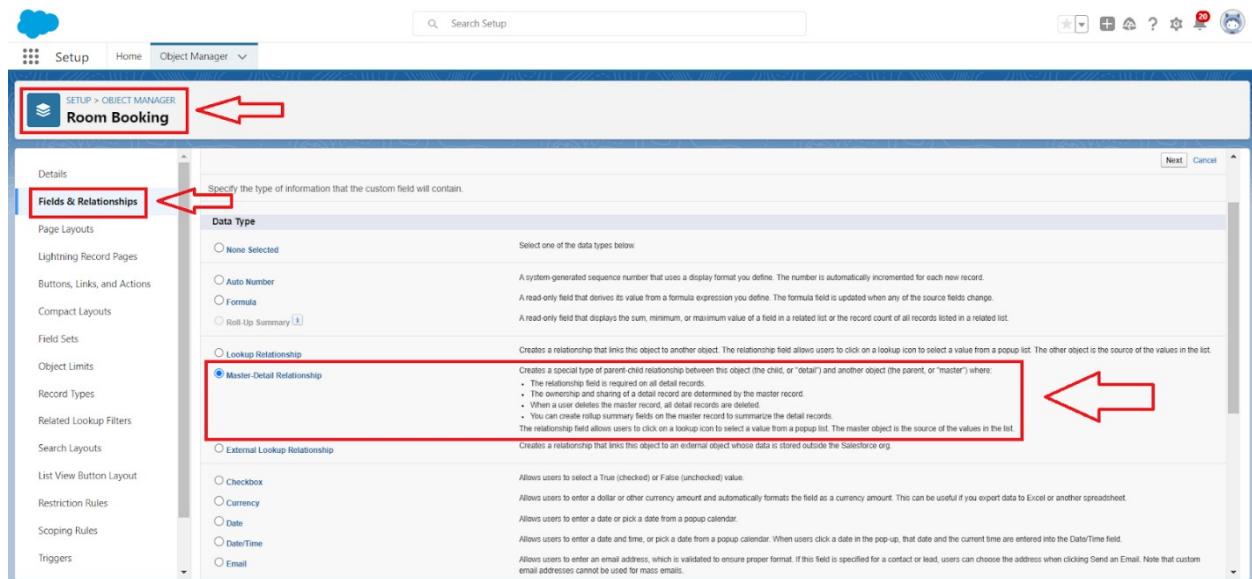
1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.

2. Now click on “Fields &Relationships” > New
  3. Select Data Type as a “Picklist”
  4. Click on Next
  5. Fillthe Above as following:
    - a. Field Label:Room Sharing
    - b. Value - Select entervalues with each value separated by a new line
1. Single sharing
  2. Double sharing
  3. Triple sharing
  - Select required
  - Click on Next > Next > Save and new.

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

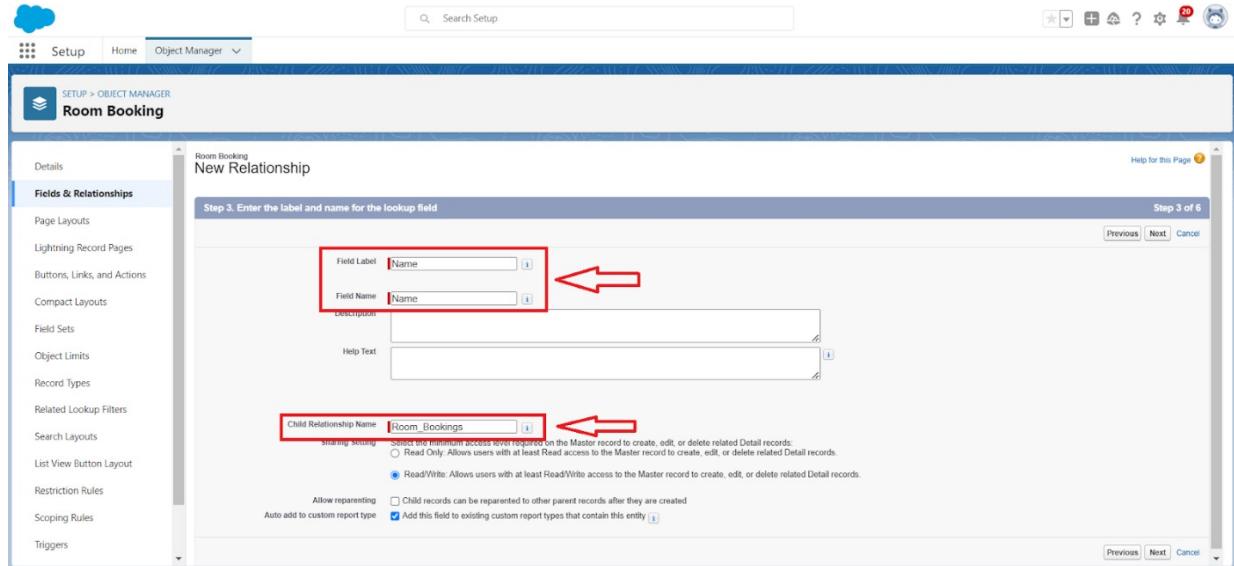
To createfields & relationship to an object:

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 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 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. Fill the 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. Fill the Above as following:
  - Field Label: Advance Payment for 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 ?clickon the object.
2. Now clickon “Fields &Relationships” ? New
3. Select Data Type as a “Currency”
4. Click on Next
5. Fillthe Above as following:
  - Field Label: Amount
  - Length: (18,0)
  - Field Name :It's gets auto generated
6. 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.

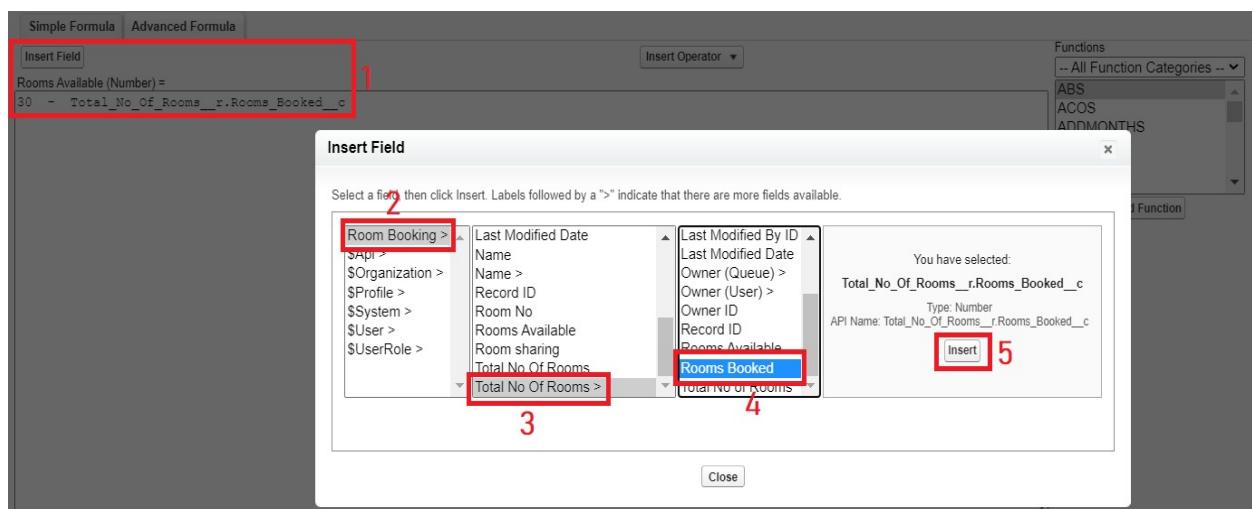
#### **7. To Create a Rollup SummaryField in “TotalRoom Object”**

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 > clickon the object.
3. Now clickon “Fields &Relationships” ? New
4. Select Data type as a“Roll-up Summary” and Click on Next
  - 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

Click on Next > Next > Save and new

#### To create fields in an object:

1. Go to setup > click on Object Manager > type objectname(Rooms Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data type as a "Formula" and Click on Next
4. Fill the Above as following:
  - Field Label: Rooms Available
  - Field Name : It's gets auto generated
  - Select the Formula Return Type as "Number"
  - Select the Decimal places as "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



- 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. Fill the Above as following:
  - Field Label: Check in

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

#### **10. 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. Fill the 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. Click on the Related to drop down and Select the 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.
- #### **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
  3. Select Data Type as a “LookupRelationship”

4. Click on Next

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

6. Fill the Above as following:

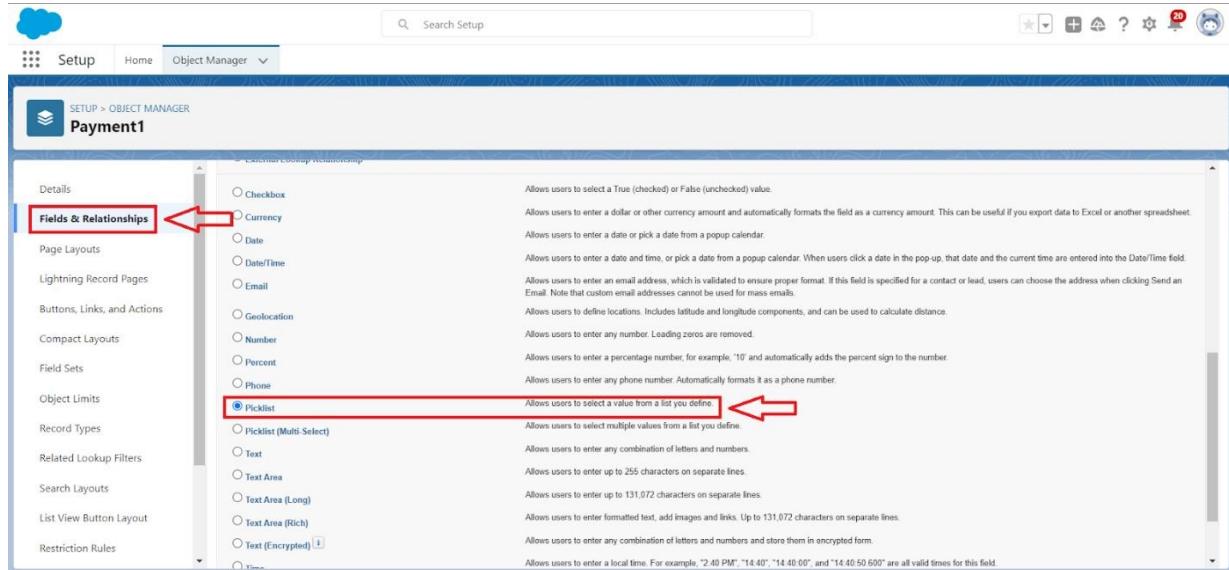
- Change the Field Label: Room Booking
- Field Name : It's gets auto generated
- Click on Next > Next > Save and new.

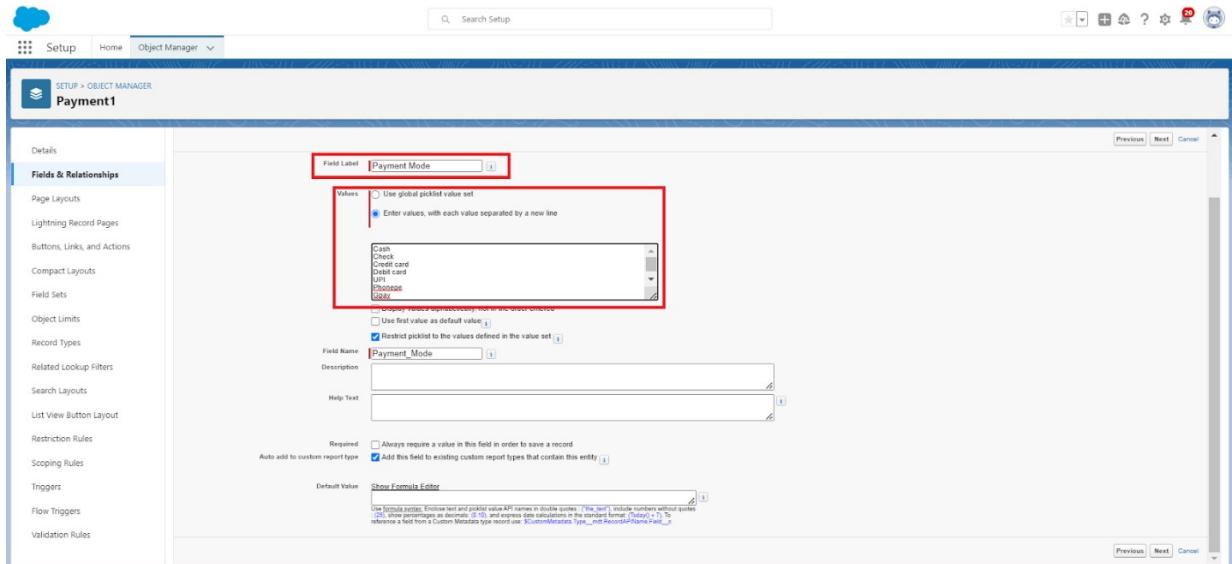
### 3. Creation of another fields for the Payment1 object

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”





1. Fill the Above as following:

- Field Label: Payment Mode
- Value - Select entervalues with each value separated by a new line
  1. Cash
  2. Check
  3. Credit card
  4. Debitcard
  5. UPI
  6. Phonepe
  7. Gpay
  8. Paytm
- Select required
- Click on Next > Next > Save and new.

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

The screenshot shows the Salesforce Object Manager. A red box highlights the 'Payment1' object 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 table area. The main table lists existing fields: Amount, Created By, Last Modified By, Name, Payment ID, Payment Mode, Payment no, and Room Booking. The 'Data Type' column indicates various types like Formula (Currency), Lookup(User), Master-Detail(Customer1), Number(18, 0), Picklist, Auto Number, and Lookup(Room Booking). The 'Controlling Field' and 'Indexed' columns show dropdown menus for each row.

3. Select Data Type as a “Formula”
4. Clickon Next
5. Enter the Field label: Amount and Field name: gets auto generatedand click on Nex
6. In the Advanced FormulaClick on the Insert field in the popup ScreenSelect the Payment1and in thesecond drop down select the Room Booking and in the three drop down select the Amount field and click on Insert “ Room\_Booking\_r.Amount\_c ”.
7. Click on the Check syntax:No syntax errorsin merge fields
8. Click on Next > Next > Save and new.

## Creation of fields for the Food Selection object

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

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

The screenshot shows the Salesforce Setup interface for the 'Food Selection' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The breadcrumb path 'SETUP > OBJECT MANAGER Food Selection' is visible. The main content area displays the 'Fields & Relationships' section, which lists various fields like Breakfast, Created By, Dinner, etc., with their respective labels, field names, data types, controlling fields, and indexing status. A red box highlights the 'Fields & Relationships' tab, and another red box highlights the 'New' button in the top right corner of the table.

3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Customer1object and clickon 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.

### **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

1. Check the Use first value as defaultvalue and Click on save.

## 2. Create a picklist Field for Food selection object

To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “Picklist”

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Step 2. Enter the details' for a 'NEW CUSTOM FIELD'. The 'Field Label' is set to 'Breakfast'. In the 'Values' section, the radio button for 'Use global picklist value set' is selected, and a dropdown menu is open, showing 'Custom Picklist values' as the option chosen. Other options in the dropdown include 'None' and 'None - not in the order entered'. The 'Field Name' is also set to 'Breakfast'. The 'Required' checkbox is checked. At the bottom, there's a note about formula syntax and a 'Show Formula Editor' link.

4. Fill the Above as following:

- Field Label: Breakfast
- Under Value - Select the Use global picklist value set
- Under the drop down select the Custom Picklist Values

- Select required
- Click on Next > Next > Save and new.

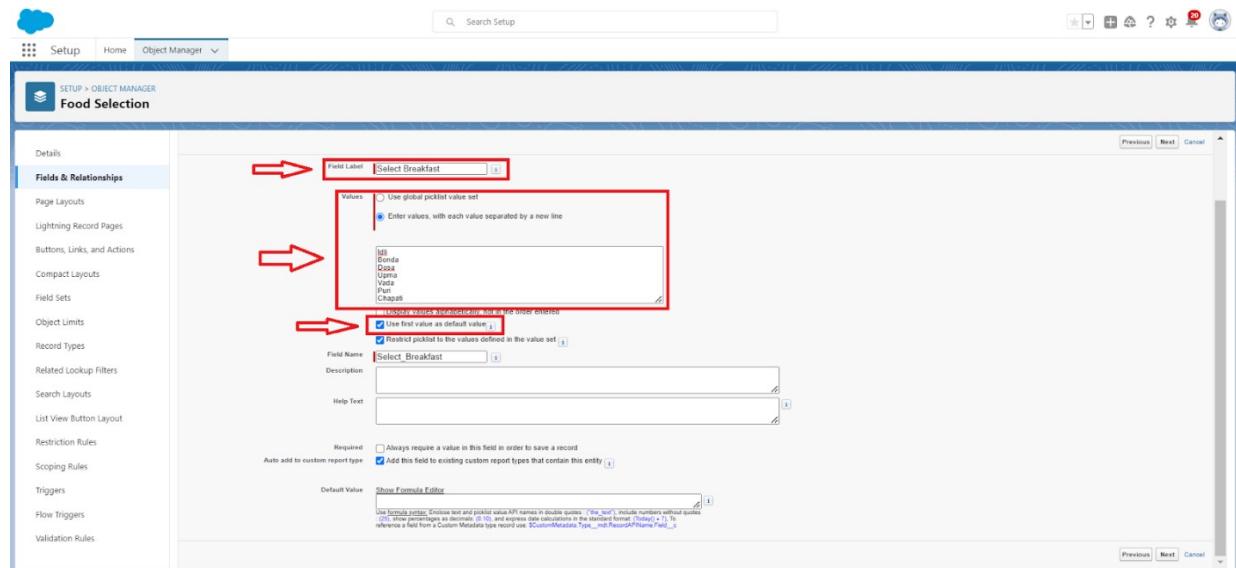
### 3. Create another picklistField for Food selection object

To create fields in an object :

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

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

1. Select Data Type as a “Picklist”



2. Fill the Above as following:

- a. Field Label: Select Breakfast
- b. Under Value - Enter values, with each value separated by a new line

1. Idli
2. Bonda
3. Dosa
4. Upma
5. Vada
6. Puri
7. Chapati

- c. Select Checkbox Use First value as defaultValue

- d. Click on Next > Next > Save and new.

### Field Dependency:

A 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 picklistfield relationships, where the available options in a dependent picklist are determined by the value selected in a controlling picklist.

### Need to use Field Dependency:

By using the field dependency we can get the different values by selecting the different Picklist.

### Create a Field Dependency on Breakfast and Select Breakfast Fields in Food Selection Object.

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now Click on fields & relationships and Click on Field Dependencies
3. Now Click on New Option
4. Under Controlling Field: Breakfast, Dependent Field: SelectBreakfast and Click on Continue
5. Under the Sunday Ctrl and select the Picklist values Idli, Dosa, Puri and Click on IncludeValues in such a way that do for the remaining days and click on save.

The screenshot shows the Salesforce Setup interface for creating a field dependency. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. Below the header, the page title is 'Food Selection' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main content area shows the 'Fields & Relationships' tab selected. A modal window is open for defining a field dependency. It has sections for 'Controlling Field' (set to 'Breakfast') and 'Dependent Field' (set to 'Select Breakfast'). A red arrow points to the 'Save' button at the top right of the modal. Another red arrow points to the 'Instructions' section below, which contains a legend for 'Included Value' and 'Excluded Value'. A large red arrow points down to the picklist table. The table has columns for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', and 'Thursday'. The 'Sunday' column is highlighted with a red box and has entries for 'Idli', 'Bonda', 'Dosa', 'Upma', 'Vada', 'puri', and 'Chapati'. The other days have similar sets of values. Red arrows point to the 'Include Values' and 'Exclude Values' buttons at the bottom of the table. The bottom of the page shows standard Salesforce navigation links: 'View All', 'Next >', 'Previous <', and 'Go to'.

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

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar ? clickon the object.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill theAbove as following:
  - Field Label:Lunch
  - Under Value - Selectthe Use global picklist valueset
  - Under the drop down select the Custom PicklistValues
  - Select required
  - Click on Next > Next > Save and new.

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

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > clickon the object.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill theAbove as following:
  - Field Label: Select Lunch
  - Under Value - Entervalues, with each value separatedby a new line
    - 1. Meals
    - 2. Chicken biryani
    - 3. Vegbiryani
    - 4. Vegfried rice
    - 5. Eggfried rice
    - 6. Chicken fried rice
    - 7. Curdrice
    - 8. Tomato rice
    - 9. Eggnoodles
    - 10. Chicken Noodles
    - 11. Bhagara rice
  - Select CheckboxUse First value as defaultValue
  - Click on Next > Next > Save and new.

**To create a Field dependencies for Lunch and Select Lunch.**

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

2. Now Click on fields & relationships and Click on Field Dependencies
3. Now Click on New Option
4. Under Controlling Field:Lunch, Dependent Field: SelectLunch and Click on Continue
5. Under the Sunday Ctrl and select the Picklist values Chicken biryani, Egg fried rice, curd rice and Click on Include Values in such a way that do for the remaining days and click on save.

**6. To create fields in an object:**

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
  - Field Label: Dinner
  - Under Value - Select the Use global picklist valueset
  - Under the drop down select the Custom Picklist Values
  - Select required
  - Click on Next > Next > Save and new.

**7. To create fields in an object:**

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
  - Field Label: Select Dinner
  - Under Value - Enter values, with each value separated by a new line
    - a. Meals
    - b. Chicken biryani
    - c. Veg biryani
    - d. Veg fried rice
    - e. Egg fried rice
    - f. Chicken fried rice
    - g. Curd rice
    - h. Tomato rice
    - i. Egg noodles
    - j. Chicken Noodles
    - k. Bhagara rice
    - Select Checkbox Use First value as defaultValue

- Click on Next > Next > Save and new.

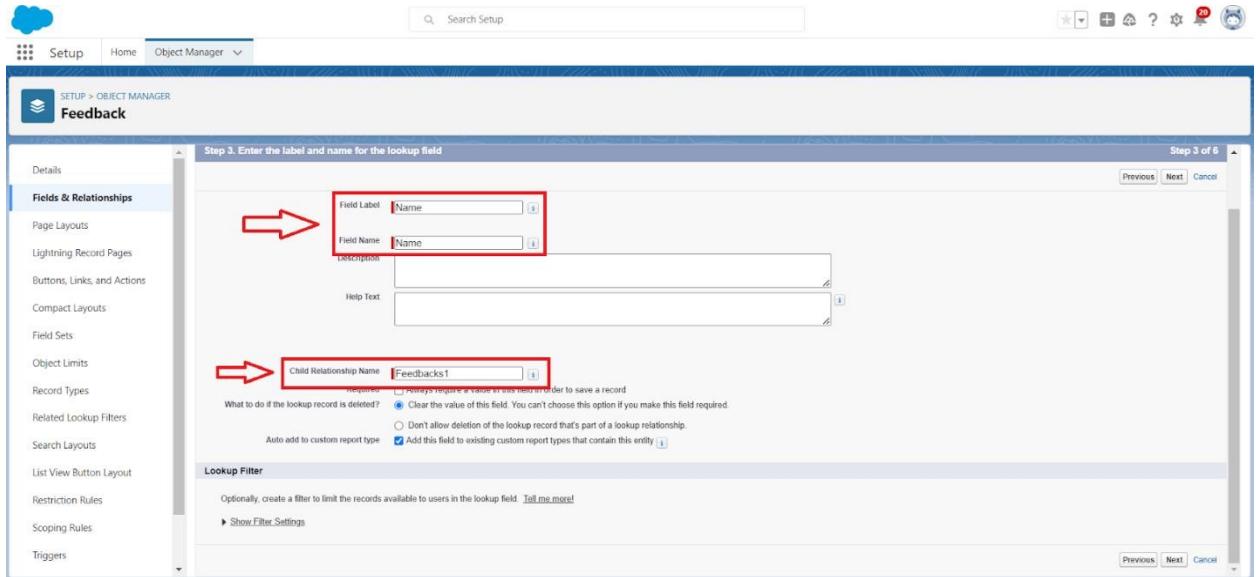
**To create Field dependencies for Dinner and Select Dinner.**

1. Go to setup > click on ObjectManager > type object name(FoodSelection) in the search bar > click on the object.
2. NowClick on fields & relationships and Click on Field Dependencies
3. NowClick on New Option
4. UnderControlling Field: Dinner,Dependent Field: SelectDinner and Click on Continue
5. Under the Sunday Ctrl and select the Picklist values Chicken biryani, curd rice, Chicken noodles and Click on Include Valuesin such a way that do for the remaining days and clickonsave.

## **Creation of fields for the Feedbackobject**

**1. createfields & relationship to an object:**

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on theobject.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “LookupRelationship”
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 in an Same object:

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on theobject.
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:Roomcleaning
  - Field Name :It's gets auto generated
  - Under Values select Enter values,with each value separated by a new line
    1. Good
    2. Satisfaction
    3. Bad
  - Click on Next > Next > Save and new.

## 3. To create a Another Fieldsin an Same Object

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

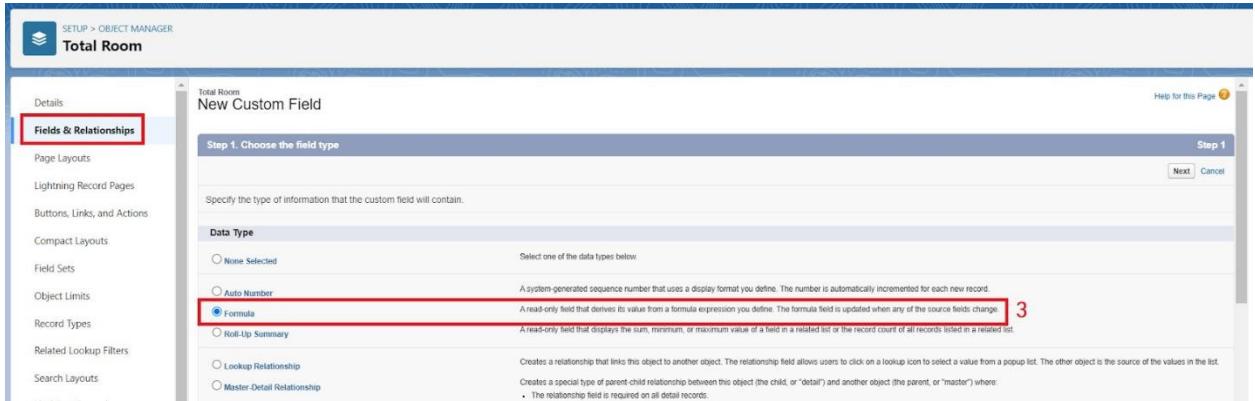
3. Select Data Type as a “Picklist”
  4. Click on Next
1. Fill the Above as following:
    - Field Label: Internet
    - Field Name : It's gets auto generated
    - Under Values select Enter values, with each value separated by a new line
      - 1. Good
      - 2. Satisfaction
      - 3. Bad
    - Click on Next > Next > Save and new.
4. **To create Another Fields in an Same Object**
    1. Go to setup > click on Object Manager > type object name(Feedback) in 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: Food
      - Field Name : It's gets auto generated
      - Under Values select Enter values, with each value separated by a new line
        - 1. Good
        - 2. Satisfaction
        - 3. Bad
      - Click on Next > Next > Save and new.

5. **To create Another Fields in an Same Object**
  1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.
  2. Now click on “Fields& Relationships” > New
  3. Select Data Type as a “Text area”
  4. Click on Next
  5. Fill the Above as following:
    - Field Label: Suggestion
    - Field Name : It's gets auto generated
    - Click on Next > Next > Save and new.

## **Creation of fields for the Total Rooms object**

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

1. Go to setup > click on Object Manager > type objectname(Total Rooms) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Formula” and Click on Next



4. Fill the Above as following:
5. Field Label: RoomsAvailable
6. Field Name : It's gets auto generated
7. Select the Formula ReturnType as “Number”
8. Select the Decimal places as “0” and Click on Next

Note: I am Considering “Total No Of Rooms = 30” While creating a new record in Total Rooms Object.

9. Click on the AdvancedFormula “30 - Rooms\_Booked\_c” and Check Syntax
10. Click on Next > Next > Save and new.

## 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 objectname(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: checkbox\_rule

Active:

Description: checkbox field is equal to true than only the record should be save.

Error Condition Formula

Example: Discount\_Percent\_c > 0.30 More Examples...  
Display an error if Discount is more than 30%.

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

Insert Field Insert Operator  
Advance\_payment\_for\_month\_c = False

Functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, ABS(number), Returns the absolute value of a number, a number without its sign, Help on this function

Error Message

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

Error Message: checkbox 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 BookingObject

1. Go to setup > click on Object Manager > type objectname(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 > 0.30 More Examples...  
Display an error if Discount is more than 30%.

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

Insert Field Insert Operator  
Check\_in\_c = False

Functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, ABS(number), Returns the absolute value of a number, a number without its sign, Help on this function

Error Message

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

Error 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 delete 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.

## **Custom platformuser1**

### **To create a new profile:**

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile(Standard platform User)
2. Enter profile name (Custom platformUser1) > Save.
3. While still on the profilepage, then clickEdit.
4. Scroll down to Custom Object Permissions and Give only Read access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.
  
5. Scroll down and Clickon Save.

## **Customplatform user2**

### **To create a new profile:**

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile(Standard platform User)
2. Enter profile name (Custom platformUser2) > Save.
3. While still on the profilepage, then clickEdit.
4. Scroll down to Custom Object Permissions and Give Create, Read, Edit and Delete access permissions for Customers, Feedbacks, Food selections, Payments and Room Bookings. And Read Access permission for Total Rooms Object.
  
5. Scroll down and Clickon Save.

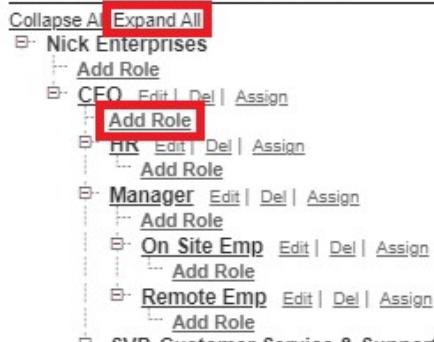
## **Roles**

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.

### Your Organization's Role Hierarchy



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

Role Edit  
New Role

Role Edit

Label	Marketing
Role Name	Marketing

This role reports to: CEO

Role Name as displayed on reports:

Save Save & New Cancel

2. Then click on Save.

### Receptionist Role

1. Go to quick find > Search for Roles > click on set up roles.
2. Click on ExpandAll and click on add role under CEO role.
3. Give Label as "Receptionist" and Role name gets auto populated.

Role Edit  
New Role

Role Edit

Label	Receptionist
Role Name	Receptionist

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 quickfind box > select users> click New user.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under the 'Users' section, the 'Users' link is highlighted with a red box and an arrow. On the main page, there is a table listing users. At the top of this table, there is a row of buttons: 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The 'New User' button is also highlighted with a red box and an arrow.

Action	Full Name *	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Androith_Veera Venkata Varaprasad	Vandr	newproject@thesmartbridge.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.0045000000dw7eav.4fbtyoxghhez@cchatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit	User_Integration	integ	integration@0005000000dw7eav.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@0005000000dw7eav.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

2. Fill in the fields

- a. First Name : sandeep
- b. Last Name : gujja
- c. Alias : Give a Alias Name
- d. Email id : Give your Personal Email id
- e. Username : Username should be in this form: [text@text.com](mailto:text@text.com)
- f. Nick Name : Give a Nickname
- g. Role : CEO
- h. User licence : Salesforce
- i. Profiles : Customuser

3. save.

## **Create Another User**

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

users > click New user.2.Fill in the fields

- a. First Name : Abhilash
- b. Last Name : garapati
- c. Alias : Give a Alias Name
- d. Email id : Give your Personal Email id
- e. Username : Username should be in thisform: [text@text.com](mailto:text@text.com)
- f. Nick Name : Give a Nickname
- g. Role : Marketing
- h. User licence: Salesforce platform

## **Create AnotherUser**

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

users > click New user.2.Fill in the fields

- i. First Name : Ganesh
- j. Last Name : gelli
- k. Alias : Give a Alias Name
- l. Email id : Give your Personal Email id
- m. Username : Username should be in thisform: [text@text.com](mailto:text@text.com)
- n. Nick Name: Give a Nickname
- o. Role : Receptionist
- p. User licence: Salesforce Platform

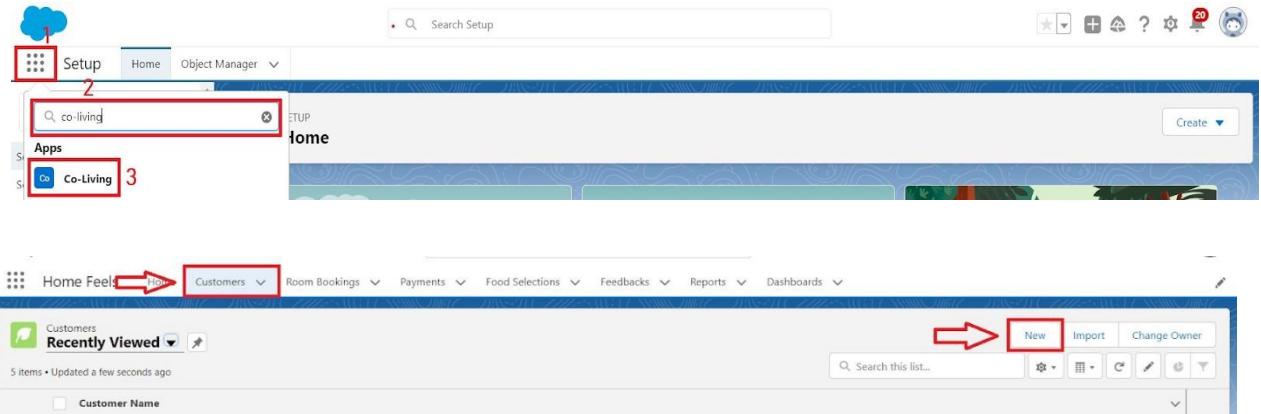
## **User Adoption**

### **Create 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 the

Customers

Tab.

4.Click

new and fill

details & Save

**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 CustomerTab.
4. Click on anyrecord name. you can see the details of the Customer.

The screenshot shows the Salesforce interface for the 'Home Feels' application. The top navigation bar includes tabs for Home, Customers (which is highlighted with a red box), Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. Below the navigation is a header with a green icon and the text 'Customer1 sandeep'. The main content area displays a customer record for 'sandeep'. The record is divided into two sections: 'Related' and 'Details'. The 'Details' section is highlighted with a red box and contains the following information:

- Customer Name:** sandeep
- Phone no:** 970526532
- Email id:** sandeep@gmail.com
- Created By:** Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm
- Owner:** Veera Venkata Varaprasad Androthu
- Permanent Address:** Hyderabad
- current Status:** Employee
- Last Modified By:** Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm

## Delete 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 the Customers Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click deleteand delete again.

The screenshot shows the Salesforce interface for the 'Home Feels' application. The top navigation bar includes tabs for Home, Customers (highlighted with a red box), Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. Below the navigation is a header with a green icon and the text 'Customers Recently Viewed'. The main content area displays a list of recently viewed customers. The list is highlighted with a red box and shows the following entries:

	Customer Name
1	sandeep <span style="color: red;">2</span>
2	Abhilash
3	Ganesh
4	suman
5	Prasad

A context menu is open for the 'sandeep' record, with the 'Delete' option highlighted with a red box. Other options in the menu include 'Edit' and 'Change Owner'.

## Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, displayit in easy-to-understand formats, and share the resulting insightswith others. Beforebuilding, reading, and sharing reports, review these reporting basics. 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.

The screenshot shows the 'Reports' section of the Co-Living app. The top navigation bar has a 'Reports' tab highlighted with a red box. Below it is a search bar and a 'New Report' button also highlighted with a red box. The main area displays a table of recent reports categorized by type (Recent, Created by Me, Private Reports, Public Reports, All Reports). The table columns include Report Name, Description, Folder, Created By, Created On, and Subscribed. One report titled 'Room booking report' is shown under 'Recent'.

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.

The screenshot shows the configuration interface for the 'Room booking report'. On the left, there are two panels: 'Groups' (highlighted with a red box) containing 'GROUP ROWS' and 'Customer Name' (with a red arrow pointing to it), and 'Columns' (highlighted with a red box) containing 'Room No', 'Phone no', 'Email id', 'Permanent Address', 'current Status', 'Room sharing', '# Advance payment for 1month', '# AC - 3000', and '# Amount' (with a red arrow pointing to it). The main area shows a preview of the report results for customers with room bookings, with a red arrow pointing to the 'Customer Name' column header. The top right of the interface has a 'Save' button highlighted with a red box.

6. Save or run it.

## Create another 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 Select customerwith Room booking with Payments ? click on start report.
4. Customize your report
5. Add fieldsfrom left pane as shownAbove
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 gatheredwith reports. Use dashboards to help users identify trends,sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, reviewthese dashboard basics.

### Create Dashboard

1. Go to the app > click on the Dashboardtabs and click on new Dashboard

The screenshot shows the Co-Living application's dashboard management screen. At the top, there is a navigation bar with links for Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Dashboards' link is highlighted with a red box and has a dropdown arrow pointing down. Below the navigation bar, there is a search bar labeled 'Search...' and a toolbar with various icons. The main area is titled 'Dashboards' and shows a list of recent dashboards. A 'New Dashboard' button is highlighted with a red box and has a red number '2' indicating pending actions. The bottom of the screen features a table header for 'DASHBOARDS' with columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'.

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

Select Report

**Reports**

**Recent**

- Created by Me
- Private Reports
- Public Reports
- All Reports

**Folders**

- Created by Me
- Shared with Me
- All Folders

Selected Report

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

Edit Component

Room booking report

Subtitle

Amount

Footer

Legend Position

Right

Component Theme

Light (Dashboard default)

Dark

Preview

**Room booking report**

Amount

Sum of Amount: ₹156k

Customer Name	Amount
Abhilash	₹28k
Ganesh	₹20k
Prasad	₹34k
sandeep	₹44k
suman	₹30k

[View Report \(Room booking report\)](#)

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

### Create Another 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 with Payments and click on select.
5. Click Add then click on Save and then click on Done.

## Flows

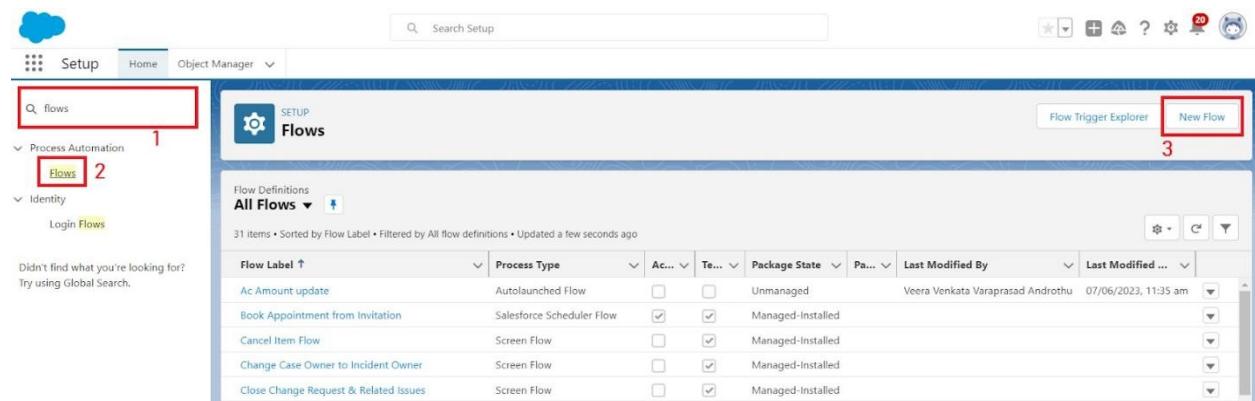
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

### Why do we need to create a flow:

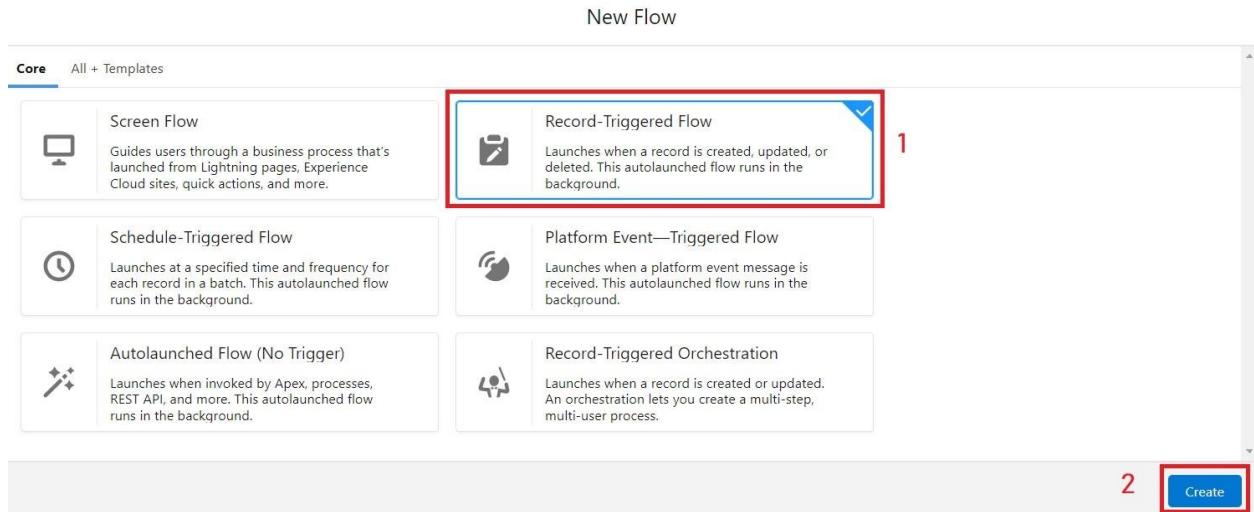
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

### 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".

1. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.

2. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "DecisionElement".

3. Enter the DetailsLabel: Field should be Update, API name: Gets Automatically Generated.

4. Enter the OutcomeDetails Label: Singlesharing, Outcome API name: Gets Automatically Generated.

a. Resource: Select Record.Room sharing.

b. Operator: Select Equals.

c. Value: Select Singlesharing.

d. Click on "Add Condition"

e. Resource: Select Record.AC-3000.

- f. Operator: Select Equals.
- g. Value: Select False.
- h. Click on “+” Symbol In the OutcomeOrder.

New Decision

\* Label: Field Should be Update   \* API Name: Field\_Should\_be\_Update

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 ①   OUTCOME DETAILS ②

Single Sharing ④

Default Outcome

All Conditions Are Met (AND) ③

Resource: \$Record > Room sharing   Operator: Equals   Value: single sharing

Resource: \$Record > AC - 3000   Operator: Equals   Value: False

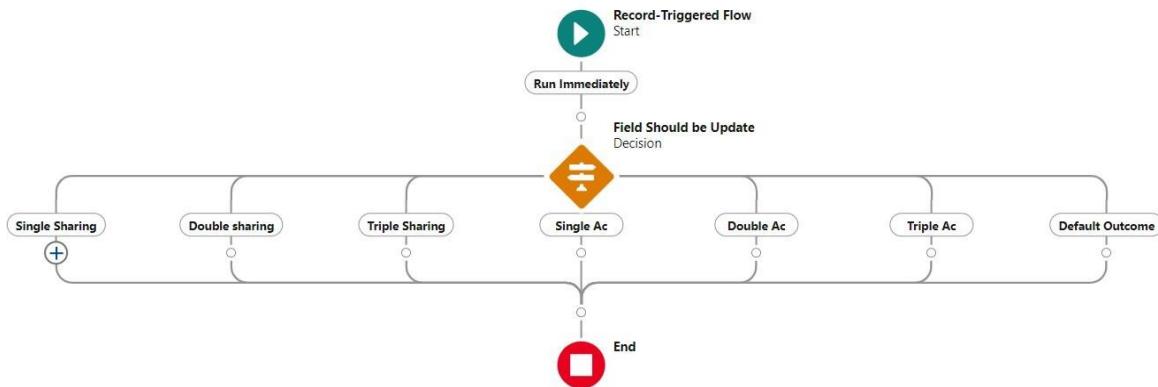
+ Add Condition

Cancel Done

5. Enter the OutcomeDetails Label: Double sharing, OutcomeAPI name: Gets Automatically Generated.
  - a. Resource: SelectRecord.Room sharing.
  - b. Operator: Select Equals.
  - c. Value: Select Doublesharing.
  - d. Click on “Add Condition”
  - e. Resource: Select Record.AC-3000.
  - f. Operator: Select Equals.
  - g. Value: Select False.
  - h. Click on “+” Symbol In the OutcomeOrder.
6. Enter the Outcome Details Label: Triple sharing, Outcome API name: Gets Automatically Generated.
  - a. Resource: SelectRecord.Room sharing.

- b. Operator: Select Equals.
    - c. Value: Select Triplesharing.
    - d. Click on “Add Condition”
    - e. Resource: Select Record.AC-3000.
  - f. Operator: Select Equals.
    - g. Value: Select False.
    - h. Click on “+” Symbol In the OutcomeOrder.
7. Enter the Outcome Details Label: Single Ac, OutcomeAPI name: Gets Automatically Generated.
- a. Resource: SelectRecord.Room sharing.
  - b. Operator: Select Equals.
  - c. Value: Select Singlesharing.
  - d. Click on “Add Condition”
  - e. Resource: Select Record.AC-3000.
  - f. Operator: Select Equals.
  - g. Value: Select True.
  - h. Click on “+” Symbol In the OutcomeOrder.
8. Enter the OutcomeDetails Label: DoubleAc, Outcome API name: Gets Automatically Generated.
- a. Resource: Select Record.Room sharing.
  - b. Operator: Select Equals.
  - c. Value: Select Doublesharing.
  - d. Click on “Add Condition”
  - e. Resource: Select Record.AC-3000.
  - f. Operator: Select Equals.
  - g. Value: Select True.
  - h. Click on “+” SymbolIn the Outcome Order.
9. Enter the Outcome Details Label: TripleAc, Outcome API name:Gets Automatically Generated.
- a. Resource: Select Record.Room sharing.

- b. Operator: Select Equals.
- c. Value: Select Triplesharing.
- d. Click on “Add Condition”
- e. Resource: Select Record.AC-3000.
- f. Operator: Select Equals.
- g. Value: Select True.
- h. Click on Done.



10. Click on “+” Symbol under the single sharing and Select the “update Records” in the drop downlist.

11. Enter the update records details

- a. Label: Single.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.
- e. Value: 28000.
- f. Click on Done.

12. Enter the update records details

- a. Label: Double.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.

- d. Field: Amount.
- e. Value: 24000.
- f. Click on Done.

13. Enter the update records details

- a. Label: Triple.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.
- e. Value: 20000.
- f. Click on Done.

14. Enter the update records details

- a. Label: Singleac1.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.
- e. Value: 34000.
- f. Click on Done.

15. Enter the update records details

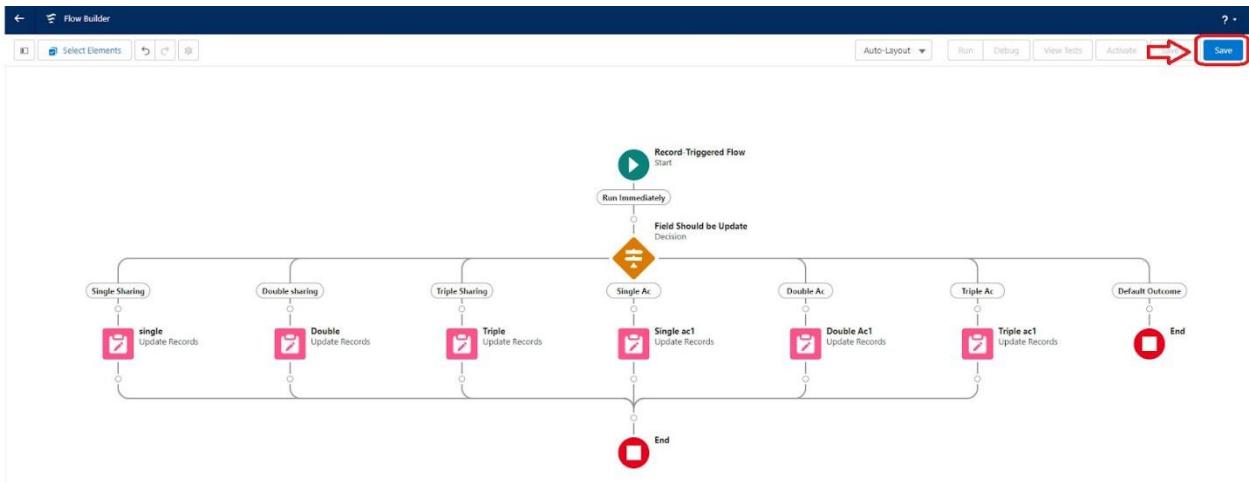
- a. Label: Doubleac1.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.
- e. Value: 30000.
- f. Click on Done.

16. Enter the update records details

- a. Label: Triple ac1.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.

- e. Value: 26000.
- f. Click on Done.

17. The Flow will Form like This and Click on save.



18. Enter the Flow Label: Update Amount Field, Flow API Name: Gets Automatically Generated 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.