

A CRM Application to Manage the Booking of Co-Living

BY

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ABSTRACT

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.

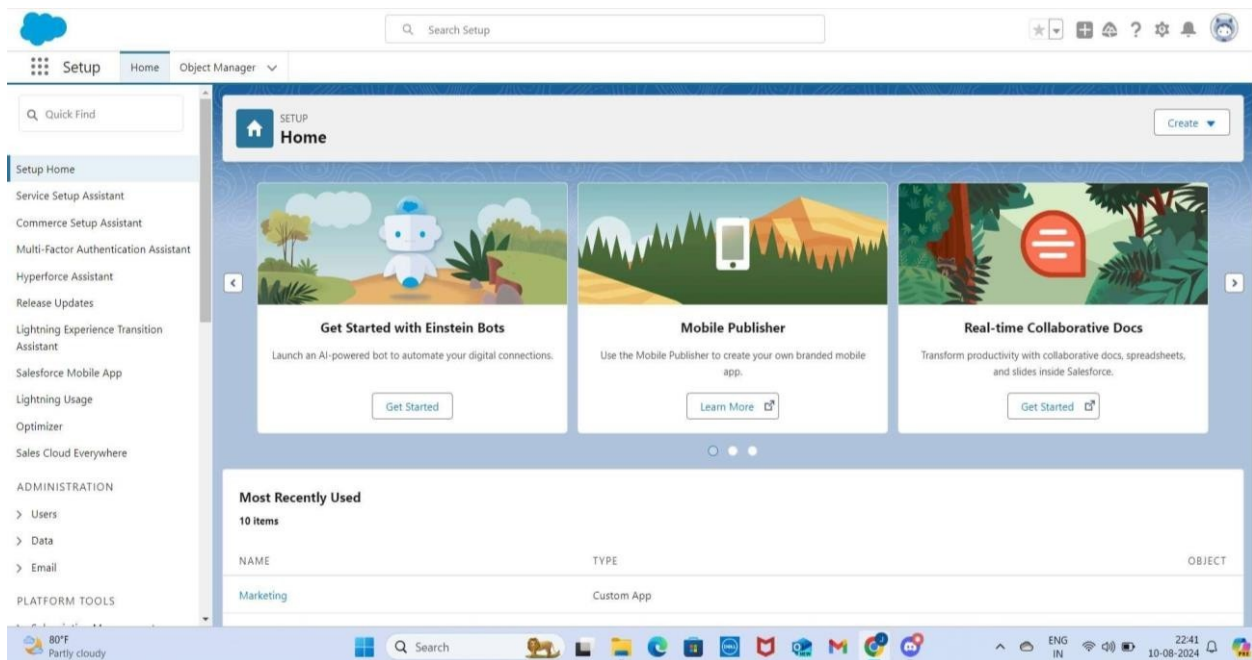
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Task 1: Creating Developer Account

Creating a developer org in salesforce:

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
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.

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srinivasaramanujarinsti287-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

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⚙️

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👤

🔍 Search Setup

★📄⚙️🔔👤

⚙️ Setup

Home

Object Manager ▾

🏠

SETUP

Object Manager

1 Items, Sorted by Label

🔍 total

Schema Builder

Create ▾

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Total Room	Total_Room__c	Custom Object		22/09/2024	✓	▾

Task 3:Creating 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:

- **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 same steps to create remaining objects.

Setup

Home

Object Manager

Search Setup

Star

Grid

Home

Help

Settings

12

Avatar

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New

What is This?

Action	Label	Tab Style	Description
Edit Del	Customers	Airplane	
Edit Del	Feedbacks	Computer	
Edit Del	Food Selections	Apple	
Edit Del	Payments	Bank	
Edit Del	Room Bookings	Building	
Edit Del	Total Rooms	Keys	

Web Tabs

New

What is This?

No Web Tabs have been defined

Visualforce Tabs

New

What is This?

Show hidden icons

Task 4: Creating a Lightning App

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 it 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.

23 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibl...
1	All Tabs	AllTabSet		22/09/2024, 5:00 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/09/2024, 5:00 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	22/09/2024, 5:00 pm	Classic	✓
4	Automation	FlowsApp	Automate business processes and repetitive tasks.	22/09/2024, 5:03 pm	Lightning	✓
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	22/09/2024, 5:02 pm	Lightning	✓
6	Booking	Booking		22/09/2024, 8:08 pm	Lightning	✓
7	Community	Community	Salesforce CRM Communities	22/09/2024, 5:00 pm	Classic	✓
8	Content	Content	Salesforce CRM Content	22/09/2024, 5:00 pm	Classic	✓
9	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	22/09/2024, 5:00 pm	Lightning	✓
10	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/09/2024, 5:00 pm	Lightning	✓
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/09/2024, 5:00 pm	Lightning	✓
12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	22/09/2024, 5:00 pm	Classic	✓
13	Platform	Platform	The fundamental Lightning Platform	22/09/2024, 5:00 pm	Classic	
14	Queue Management	QueueManagement	Create and manage queues for your business.	22/09/2024, 5:00 pm	Lightning	✓

Task 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.

To create fields in an object:

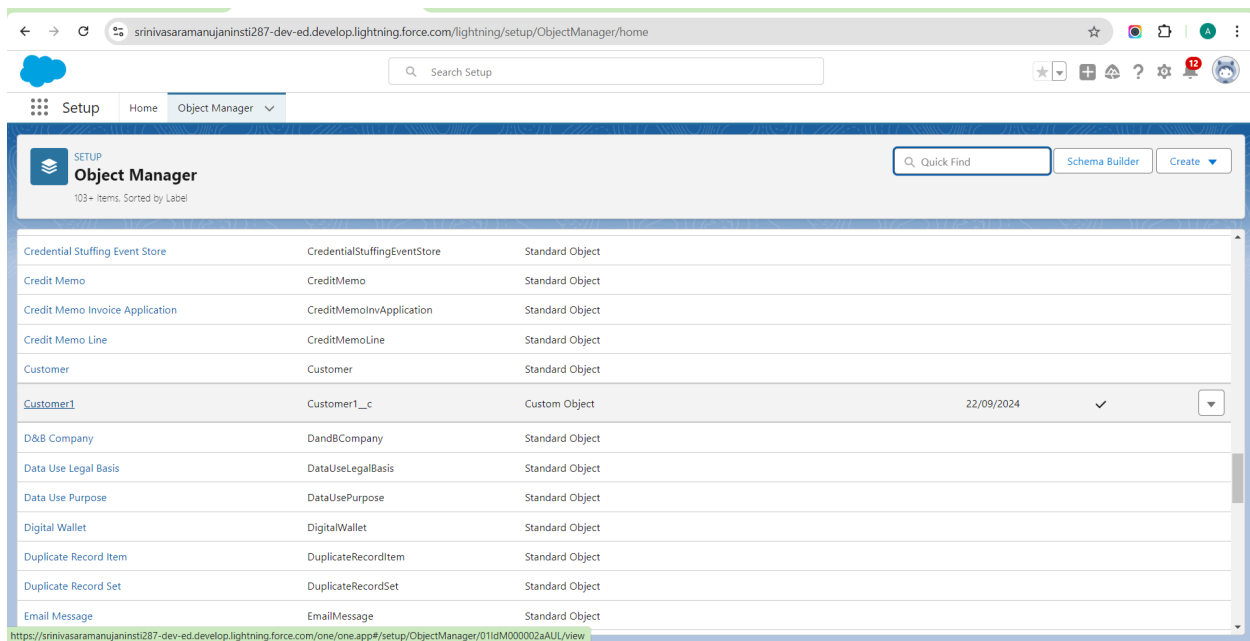
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.

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

3. Select Data Type as a “Phone”

5. Fill the Above as following:

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



The screenshot displays the Salesforce Object Manager interface. The browser address bar shows the URL: `srinivasaramanujani287-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes the Salesforce logo, a search bar, and navigation links for Setup, Home, and Object Manager. The main content area is titled "Object Manager" and shows a list of 103 items, sorted by Label. The list includes various standard objects like "Credential Stuffing Event Store", "Credit Memo", "Credit Memo Invoice Application", "Credit Memo Line", "Customer", "D&B Company", "Data Use Legal Basis", "Data Use Purpose", "Digital Wallet", "Duplicate Record Item", "Duplicate Record Set", and "Email Message". The "Customer1" object is highlighted, showing it is a Custom Object created on 22/09/2024. The URL at the bottom of the page is `https://srinivasaramanujani287-dev-ed.develop.lightning.force.com/one.app#/setup/ObjectManager/011dM000002aAUI/view`.

Object Name	API Name	Type	Created Date	Status
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object		
Credit Memo	CreditMemo	Standard Object		
Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object		
Credit Memo Line	CreditMemoLine	Standard Object		
Customer	Customer	Standard Object		
Customer1	Customer1__c	Custom Object	22/09/2024	✓
D&B Company	DandBCompany	Standard Object		
Data Use Legal Basis	DataUseLegalBasis	Standard Object		
Data Use Purpose	DataUsePurpose	Standard Object		
Digital Wallet	DigitalWallet	Standard Object		
Duplicate Record Item	DuplicateRecordItem	Standard Object		
Duplicate Record Set	DuplicateRecordSet	Standard Object		
Email Message	EmailMessage	Standard Object		

Task 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 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 1 month)
7. Click on save.

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is "Setup > OBJECT MANAGER". The "Room Booking" object is selected. The "Validation Rules" section is active, showing a list of 2 rules. The rules are sorted by Rule Name. The first rule is "check_in_rule" with an error location of "Check in" and an error message of "Check box should be checked". The second rule is "checkbox_field" with an error location of "Advance Payment for 1 Month" and an error message of "Checkbox should be checked". Both rules are active and were modified by "PEESAY ASHA BAI" on 23/09/2024.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
check_in_rule	Check in	Check box should be checked	✓	PEESAY ASHA BAI, 23/09/2024, 3:37 pm
checkbox_field	Advance Payment for 1 Month	Checkbox should be checked	✓	PEESAY ASHA BAI, 23/09/2024, 3:34 pm

Task 7:Profiles

Profile

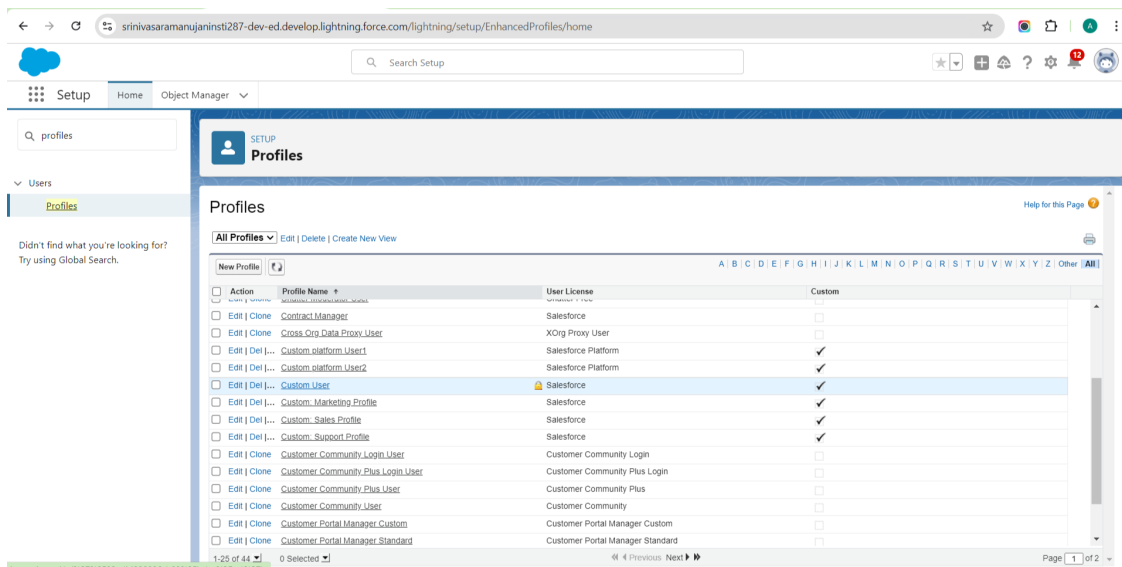
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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



The screenshot shows the Salesforce Setup page for Profiles. The left sidebar has a search bar with 'profiles' entered. The main content area shows a list of profiles. The 'Custom User' profile is selected and highlighted in blue. The table below shows the details of the selected profile.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom platform User1	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom platform User2	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom_Support_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>

Task 8:Roles

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.

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.

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 CEO role.
3. Give Label as "Receptionist" and Role name gets auto populated.
4. Then click on Save.

Task 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 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
3. Click save.

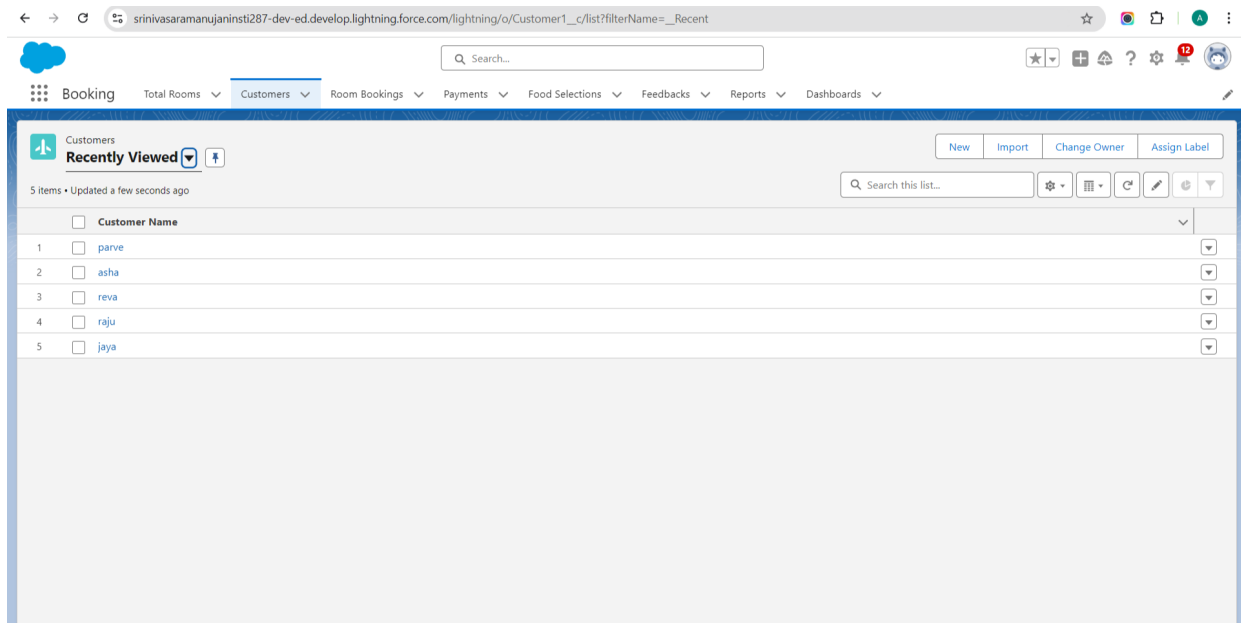
The screenshot shows the Salesforce Setup page for Users. The left sidebar contains the Setup menu with options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'All Users' and includes a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The 'gujja sandeep' user is highlighted in blue.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	ASHA.BAI PEESAY	BA5idd	aashabai@stt.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_000dm0000cqvoua1.hnpwmcn460@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	garapati Abhinash	apara	gapatni@tech.com	Marketing	✓	Custom platform User1
<input type="checkbox"/> Edit	gelli Ganesh	gelli	gganesh@tech.com	Receptionist	✓	Custom platform User2
<input type="checkbox"/> Edit	gujja sandeep	sgujj	aasha@asha.com	CEO	✓	Custom User
<input type="checkbox"/> Edit	User Integration	integ	integration@000dm0000cqvoua1.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	iss@stsecurity@000dm0000cqvoua1.com		✓	Analytics Cloud Security User

Task 10:User Adoption

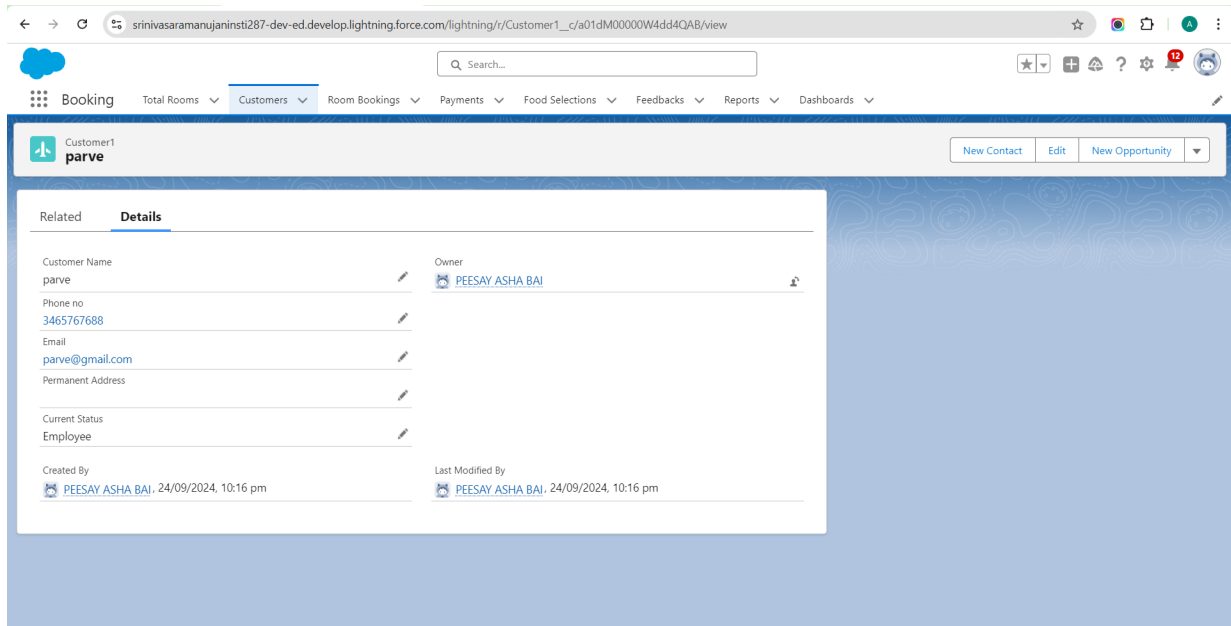
Create a Record (Customers)

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.
5. Click Save.



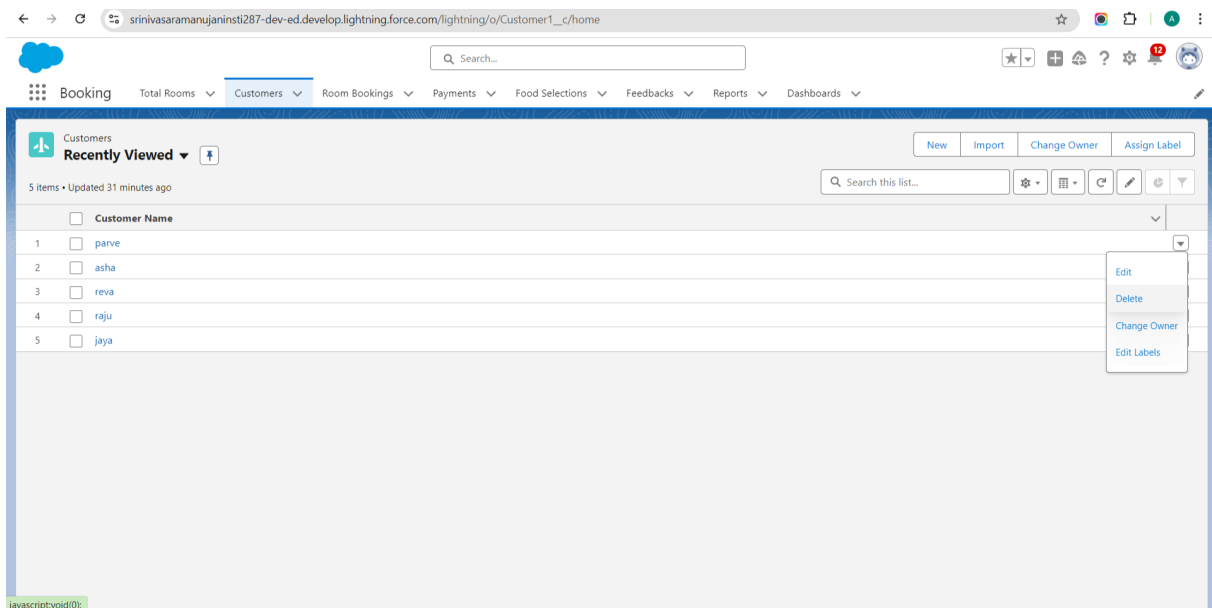
View a Record (Customers)

1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on Customer 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 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 delete and delete again.



Task 11: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.
5. Add fields from left pane as shown below.
6. Save or run it.

The screenshot displays the Salesforce Reports interface. At the top, there's a navigation bar with the Salesforce logo and a search bar. Below the navigation bar, there's a sidebar with various app icons, including 'Booking', 'Total Rooms', 'Customers', 'Room Bookings', 'Payments', 'Food Selections', 'Feedbacks', 'Reports', and 'Dashboards'. The 'Reports' tab is currently selected. The main content area shows a list of recent reports. The list has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. There are two reports listed: 'Room Bookig Report2' and 'Room Bookig Report1'. Both reports are in the 'Private Reports' folder and were created by 'PEESAY ASHA BAI' on '23/9/2024, 9:36 pm' and '23/9/2024, 9:30 pm' respectively. On the left side of the main content area, there's a sidebar with various filters and folders, including 'Recent', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Room Bookig Report2		Private Reports	PEESAY ASHA BAI	23/9/2024, 9:36 pm	
Created by Me	Room Bookig Report1		Private Reports	PEESAY ASHA BAI	23/9/2024, 9:30 pm	

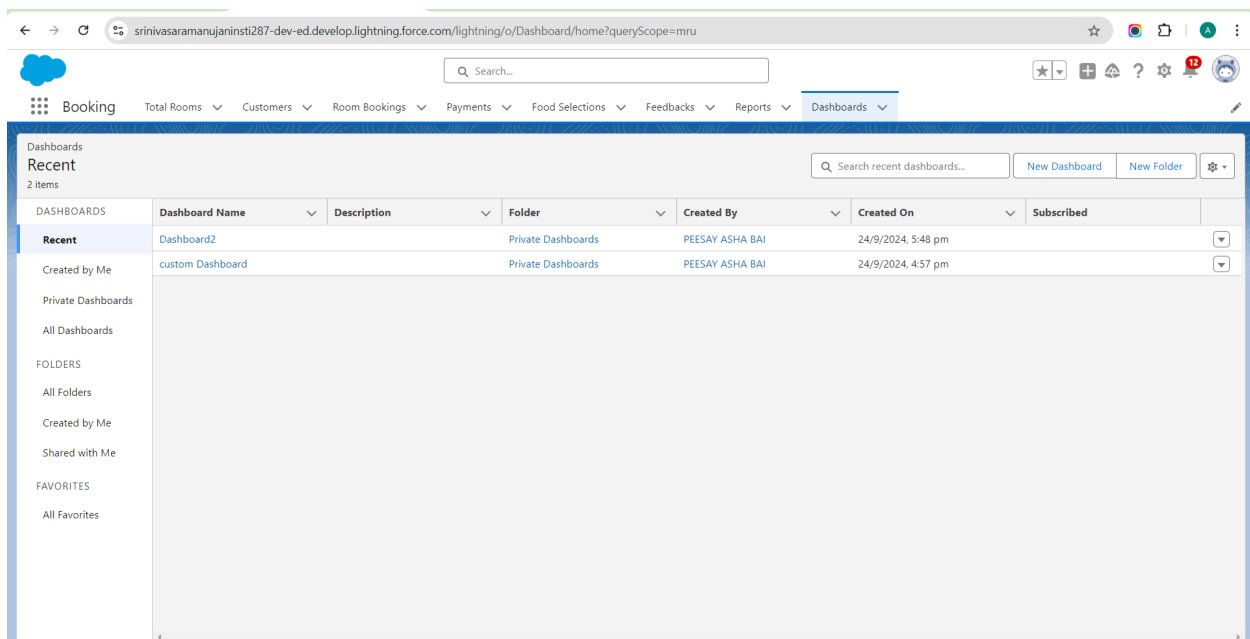
Task 12:Dashboards

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.



The screenshot shows the Salesforce Dashboards interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu is visible, with the 'Dashboards' tab selected. The 'Dashboards' page displays a list of recent dashboards under the 'Recent' section. The list includes two items: 'Dashboard2' and 'custom Dashboard', both created by 'PEESAY ASHA BAI' on 24/9/2024. The interface also shows sections for 'Private Dashboards', 'All Dashboards', 'FOLDERS', and 'FAVORITES'.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Dashboard2		Private Dashboards	PEESAY ASHA BAI	24/9/2024, 5:48 pm	
Created by Me	custom Dashboard		Private Dashboards	PEESAY ASHA BAI	24/9/2024, 4:57 pm	

Task 13: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. 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".
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.
9. 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.

- Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on “+” Symbol In the Outcome Order.
10. 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.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on “+” Symbol In the Outcome Order.
11. 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.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select True.
 - Click on “+” Symbol In the Outcome Order.
12. 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.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select True.
 - Click on “+” Symbol In the Outcome Order.
13. 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.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select True.
 - Click on Done.

14. Click on "+" Symbol under the single sharing and Select the "update Records" in the drop down list.

15. 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.
- Click on Done.

16. 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.
- Click on Done.

17. 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.
- Click on Done.

18. 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.
- Click on Done.

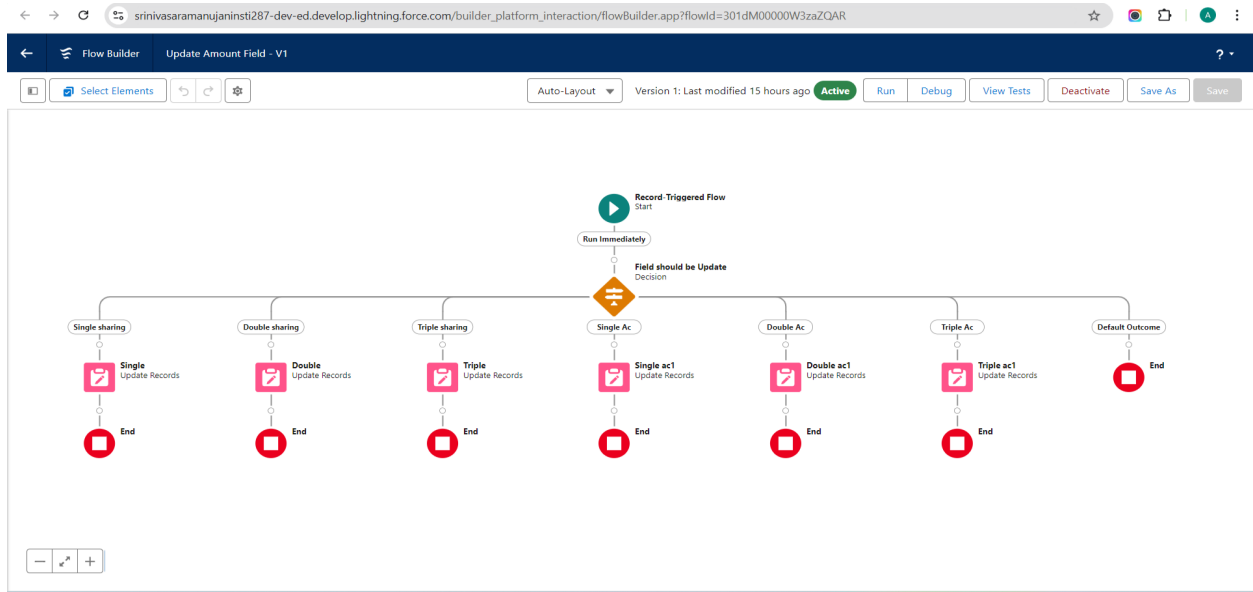
19. Enter the update records details

- Label: Double ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 30000.
- Click on Done.

20. 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.

21. Click on Done. The Flow will Form like This and Click on save.
22. Enter the Flow Label: Update Amount Field, Flow API Name: Gets Automatically Generated and Click on Save.



Search Setup

Setup Home Object Manager

flows

Process Automation

Flows

Identity

Login Flows

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Flow Definitions

All Flows

43 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a minute ago

Flow Label	Process Type	Act...	Te...	Package State	Pac...	Last Modifie...	Last Modified Date
Outbound Modify Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Outbound New Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Reassign Multiple Service Appointments	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Recurrence Schedule Flow	Autolaunched Flow	✓	✓	Managed-Installed			
Reset Password	Screen Flow	✓	✓	Managed-Installed			
Reship Order Flow	Screen Flow	✓	✓	Managed-Installed			
Return Item Flow	Screen Flow	✓	✓	Managed-Installed			
RMA Create Credit Memo and Ensure Refunds Flow	Autolaunched Flow	✓	✓	Managed-Installed			
RMA Return Items	Screen Flow	✓	✓	Managed-Installed			
Send Appointment Invitation to Actionable List Members	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Update Amount Field	Autolaunched Flow	✓	✓	Unmanaged		PEESAY ASHA BAI	24/09/2024, 10:11 pm
Verify Identity	Screen Flow	✓	✓	Managed-Installed			

Test the Flow:

1. Go to App Launcher and search for Co-living and select the app.
2. In the Co-living app click on the Room sharing tab and click on 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.

The screenshot shows a Salesforce Lightning page for a Room Booking record with ID RN-007. The page is titled "Room Booking RN-007" and has a "Details" tab selected. The record details are as follows:

Field	Value
Room No	RN-007
Room Sharing	Double sharing
Name	parve
AC-3000	
Advance Payment for 1 Month	
Amount	₹30,000
Total No Of Rooms	1
Rooms Available	27
Check in	
Check Out	

At the bottom of the page, it shows the record was created by PEESAY ASHA BAI on 24/09/2024 at 10:17 pm and last modified by the same user at the same time.