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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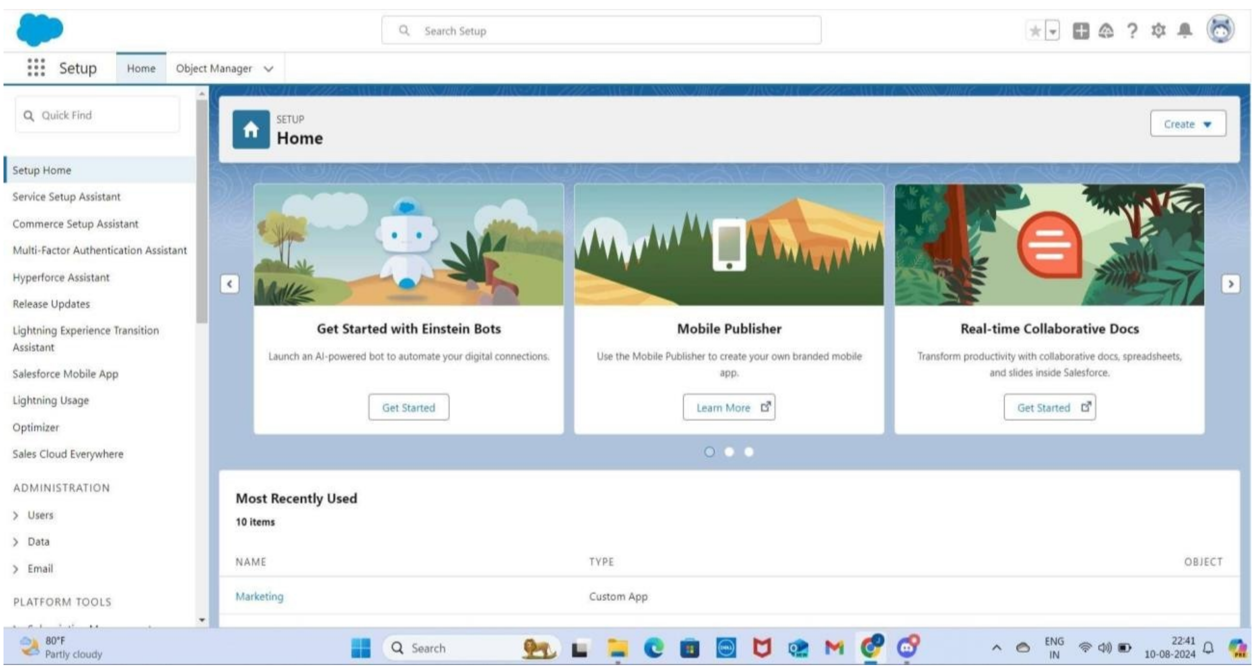
Task 1:Creating Developer Account

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?

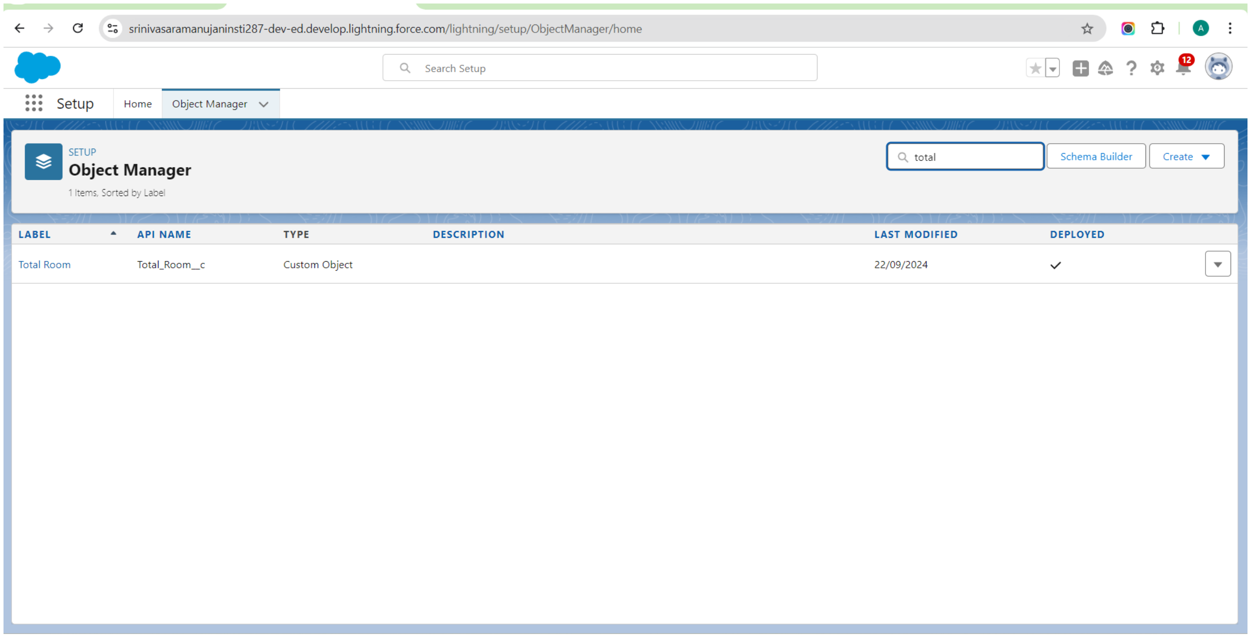
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects .
Salesforce objects are of two types:

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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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.

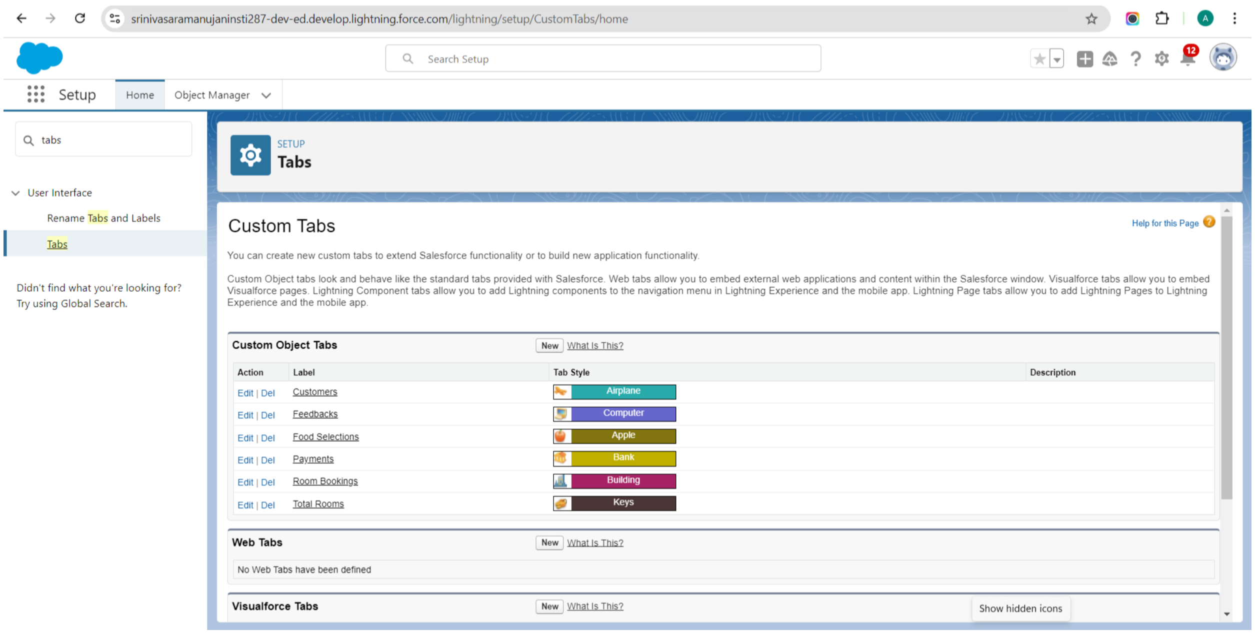
5.Lightning Page Tabs:

- **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.



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Search Setup
Setup
Home
Object Manager
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

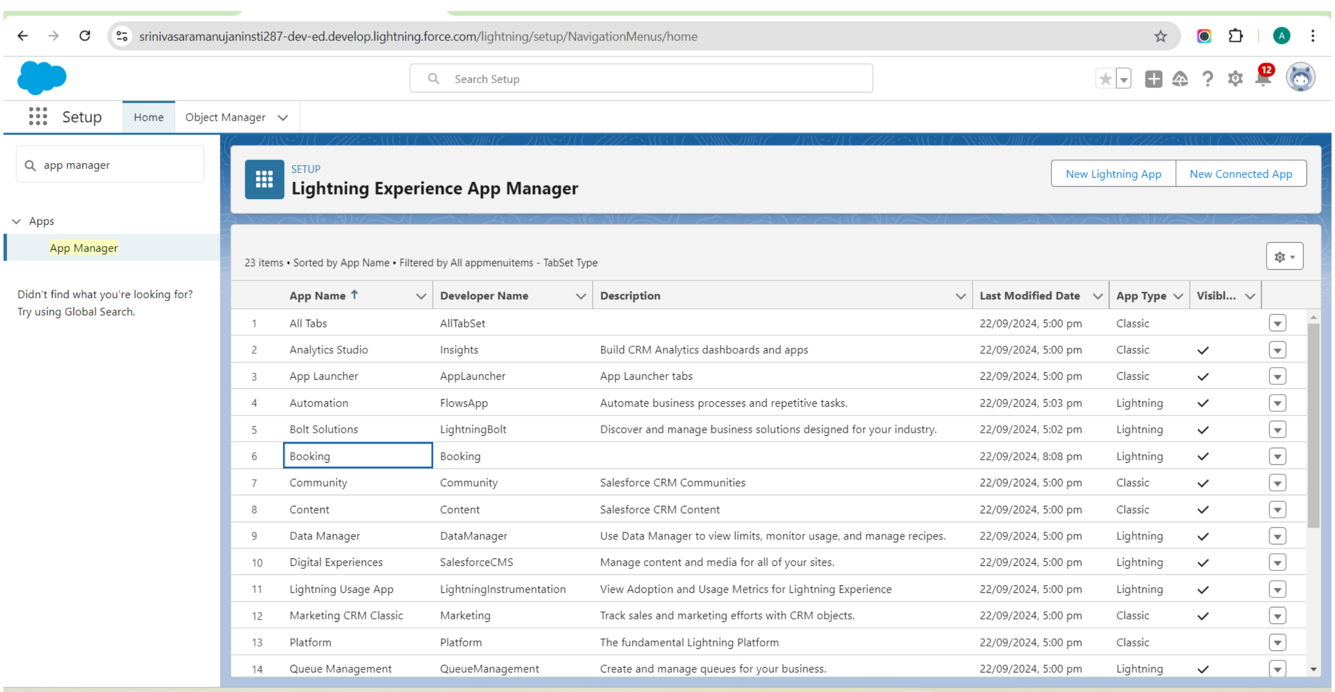
Task 4: Creating a Lightning App

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.



	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:

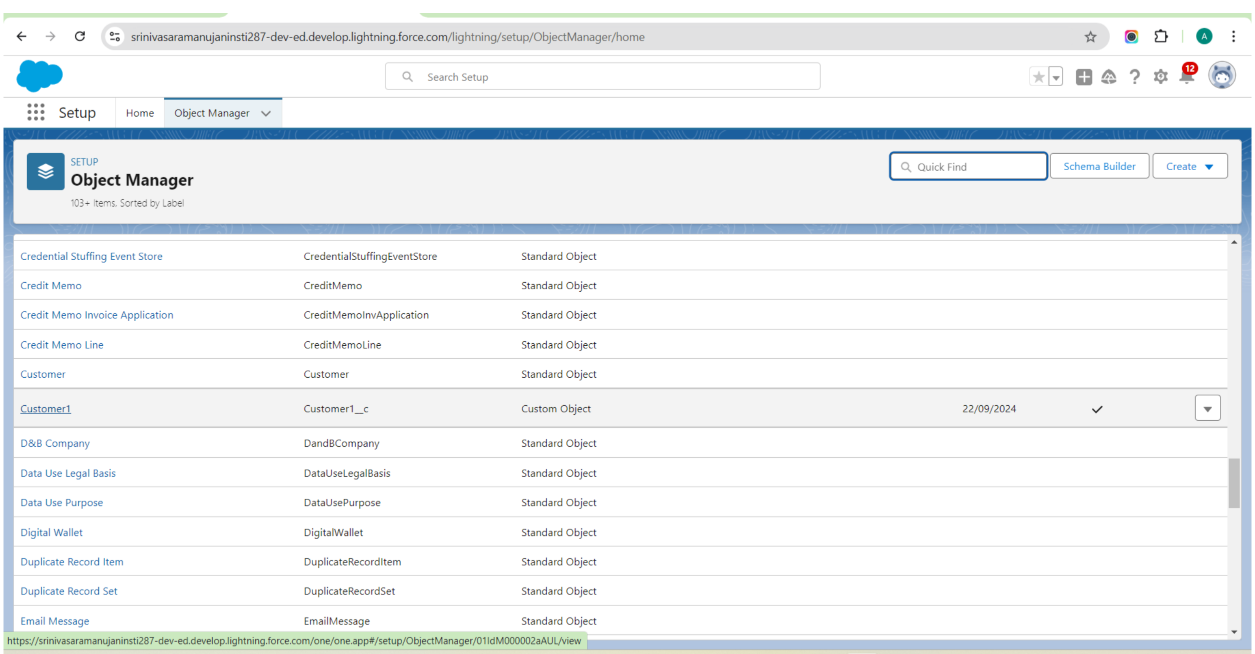
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.

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.



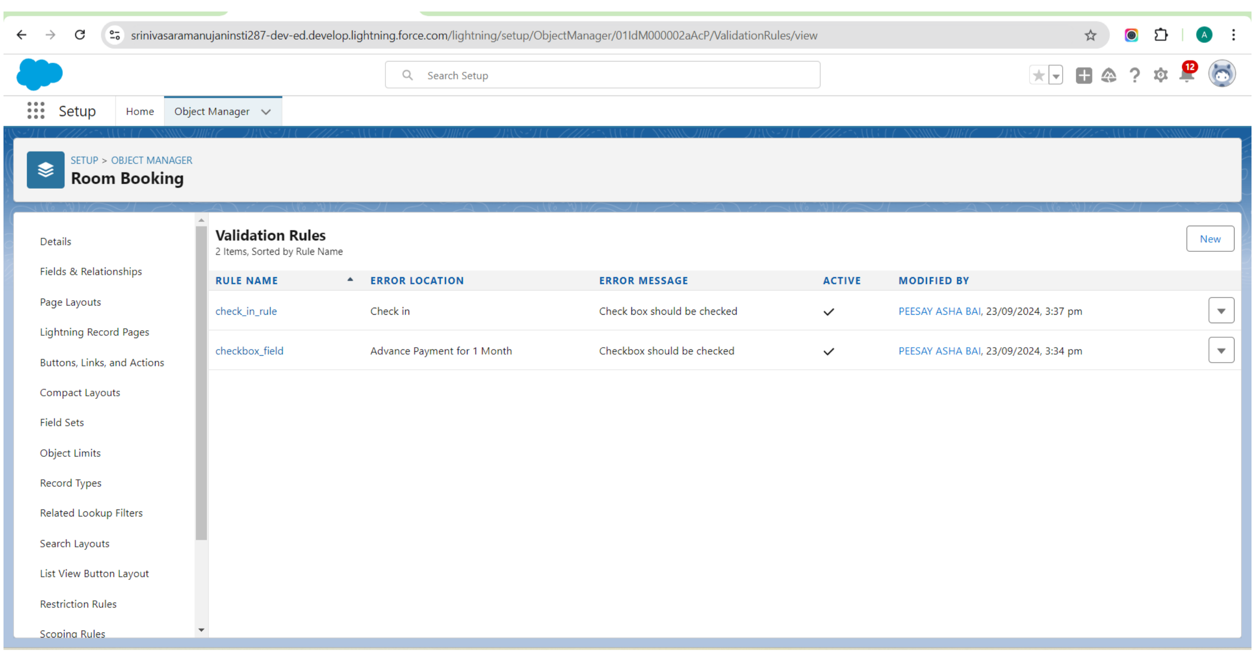
Task 6: Validation Rule

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 1month)
7. Click on save.



Task 7:Profiles

Profile

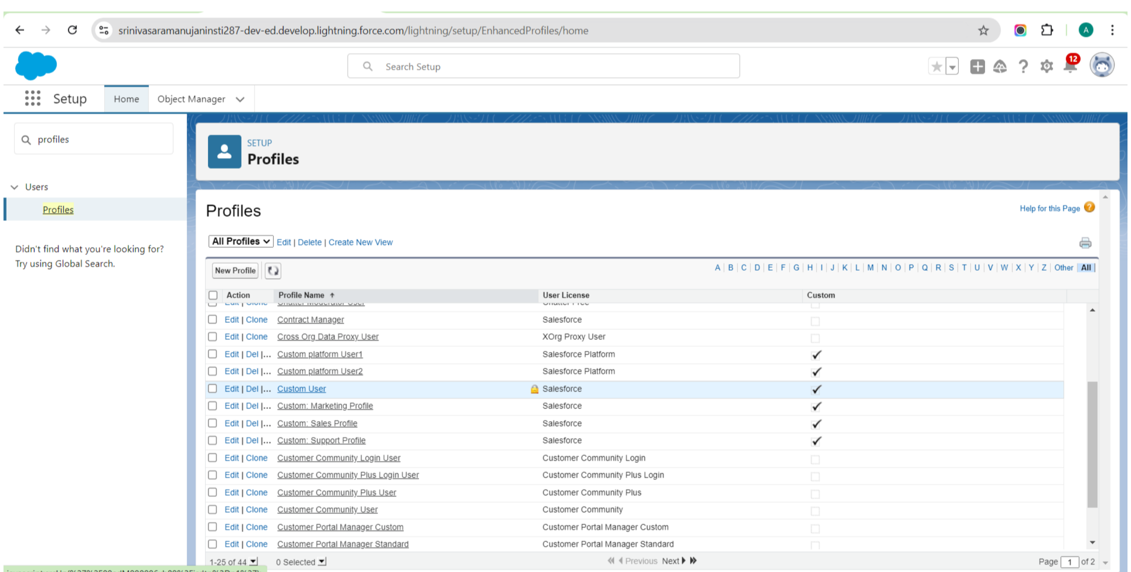
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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



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.

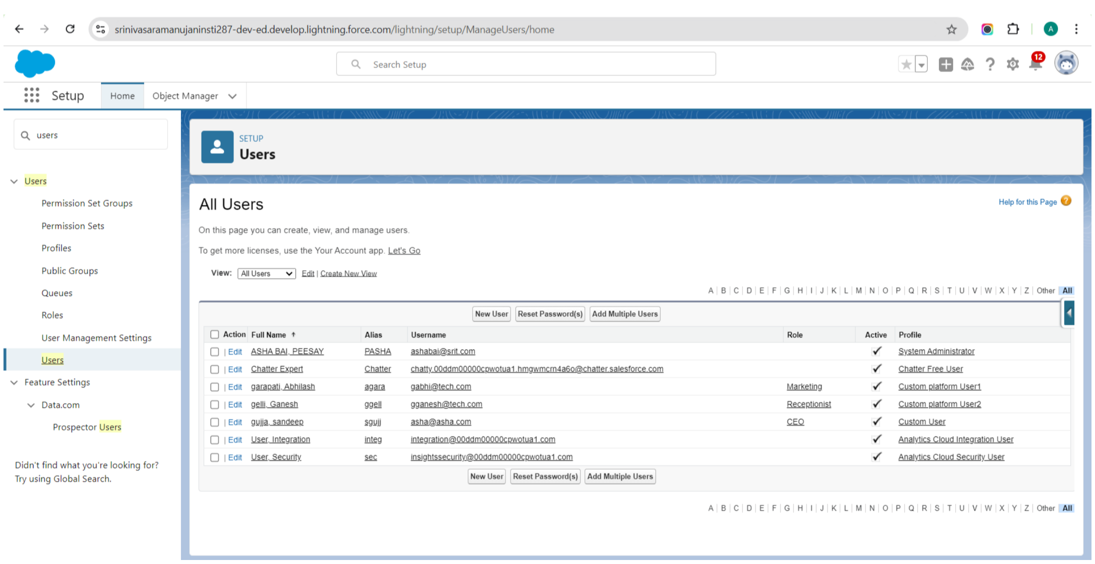
Task 9:Users

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

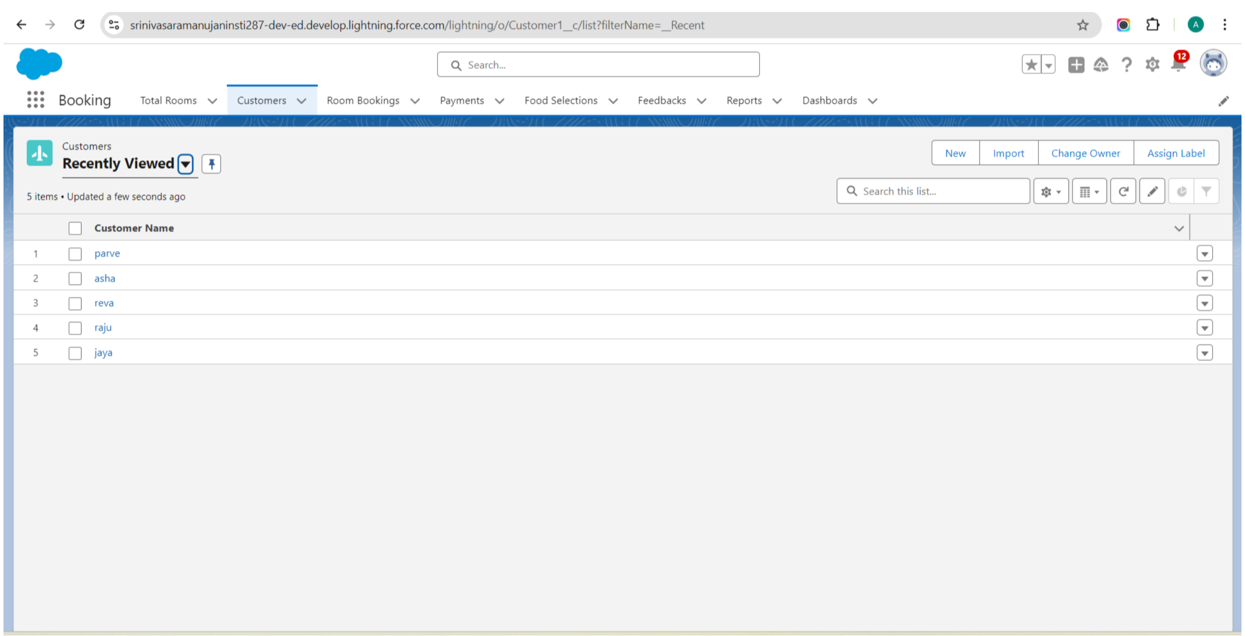
1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
    - First Name : sandeep
    - Last Name : gujja
    - Alias : Give a Alias Name
    - Email id : Give your Personal Email id
    - Username : Username should be in this form: text@text.com
    - Nick Name : Give a Nickname
    - Role : CEO
    - User licence : Salesforce
    - Profiles : Custom user
3. Click save.



Task 10:User Adoption

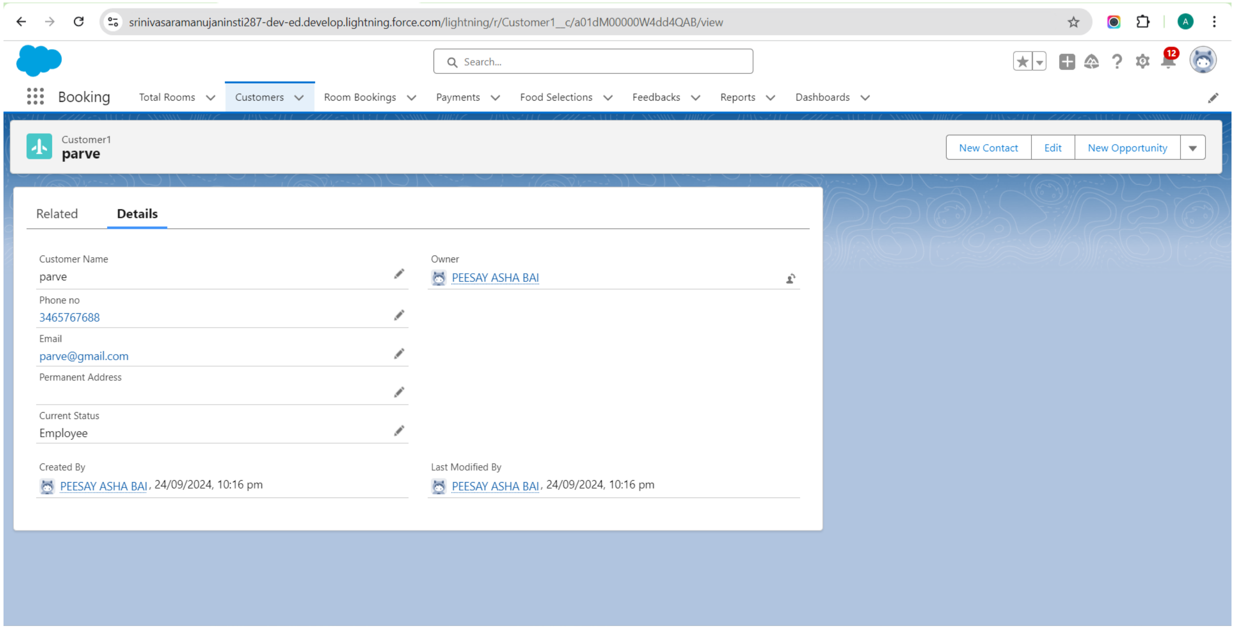
Create a Record (Customers)

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.



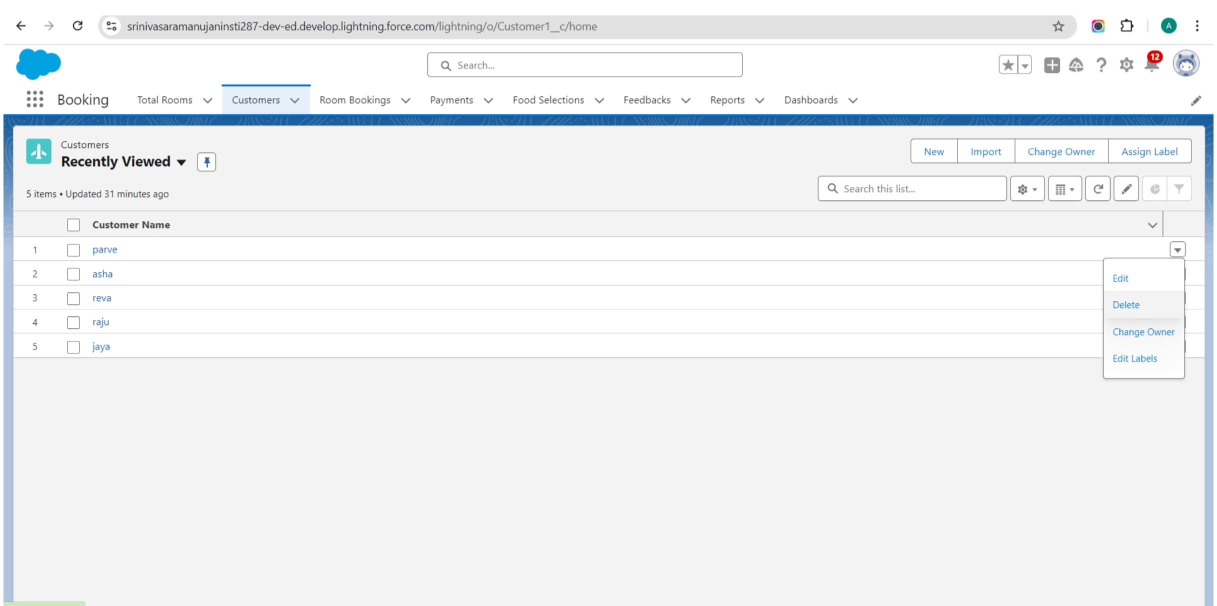
View a Record (Customers)

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

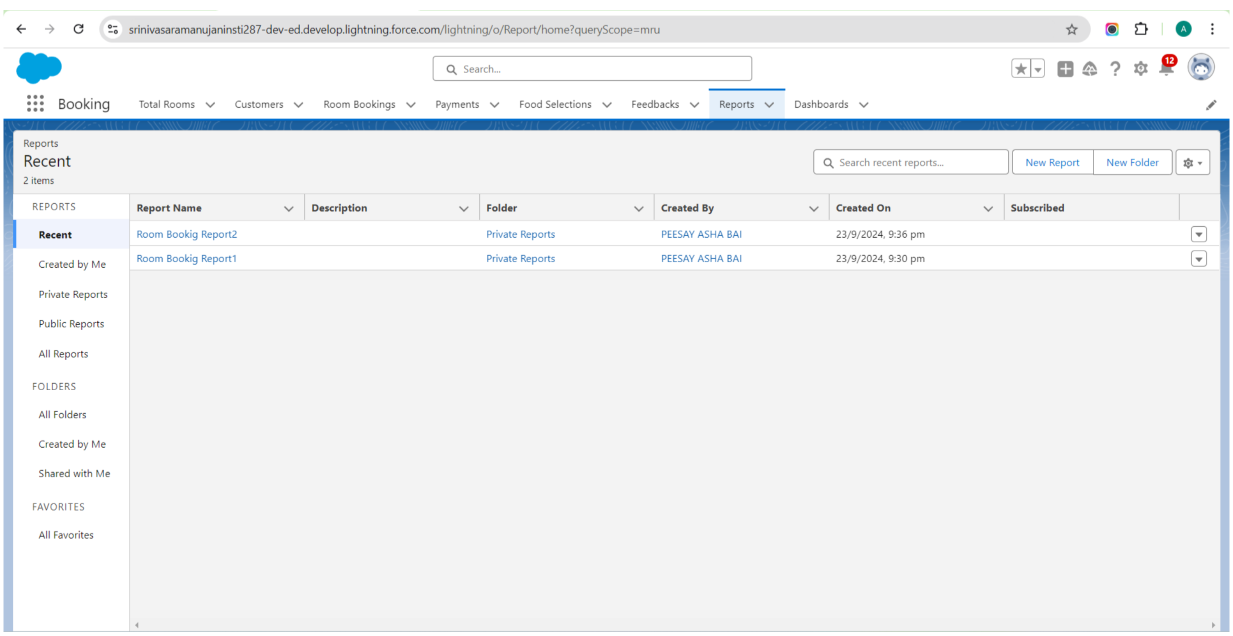
Reports:

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.



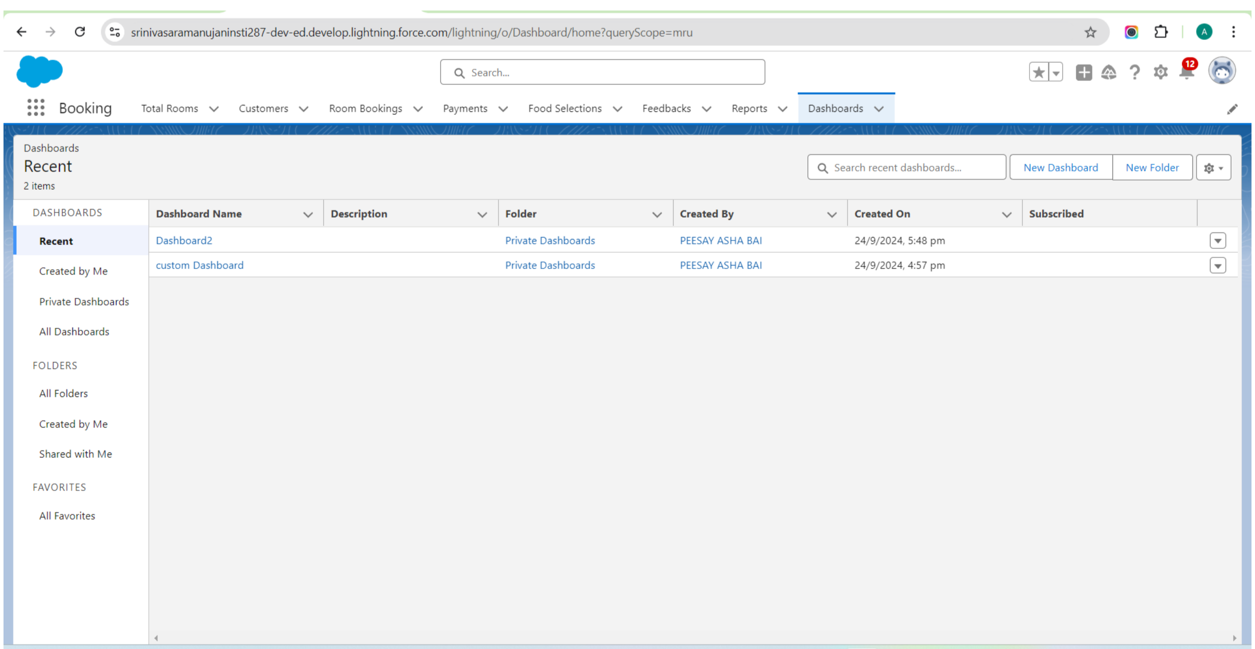
Task 12:Dashboards

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.



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.

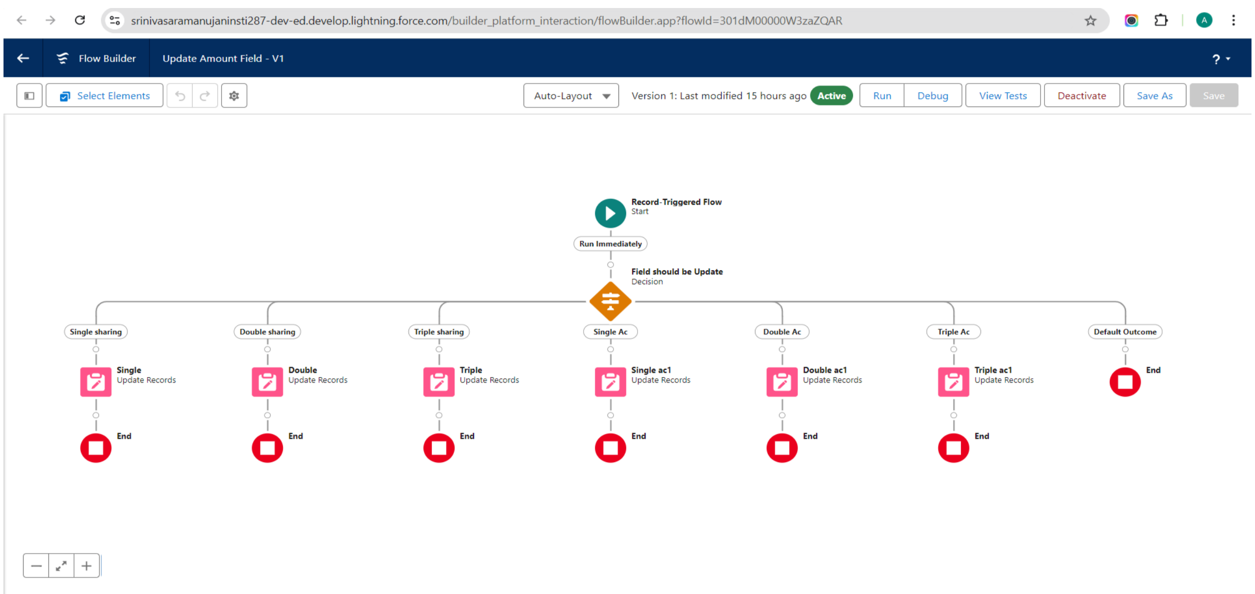
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select False.
- Click on “+” Symbol In the Outcome Order.

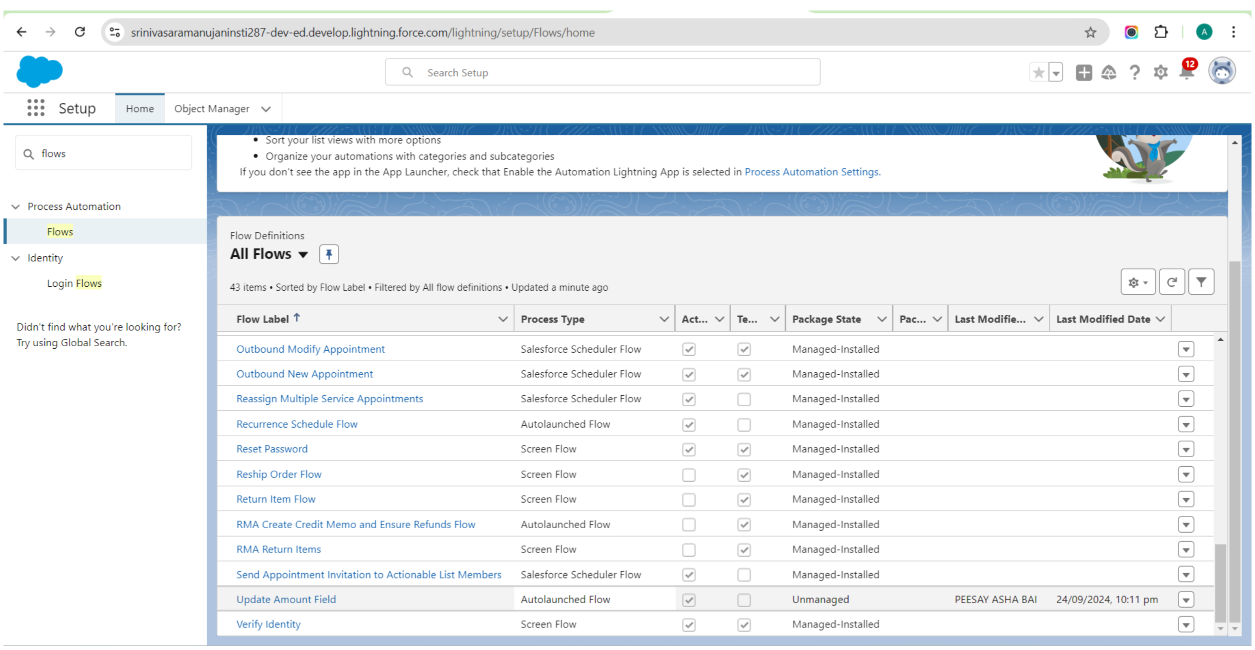
10. Enter the Outcome Details Label: Triple sharing, Outcome API name: Gets Automatically Generated.
    - Resource: Select Record.Room sharing.
    - Operator: Select Equals.
    - Value: Select Triple sharing.
    - Click on “Add Condition”
    - Resource: Select Record.AC-3000.
    - Operator: Select 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.





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.