A CRM Application to Manage the Booking of CoLiving

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

Features and Functionality:

1. **Customer Management**
    - **Customer Registration:** Users can registerthemselves by providingpersonaldetails such asname, email, phone number, and address.
    - **Customer Profile:** A user profile will be created to store customer information,bookinghistory, and payment details.

2. **Room Booking**
    - **Room Selection:** Users can browse and select from different ACrooms with multiple sharing options (e.g., single, double, triple sharing).
    - **Room Availability:** The application will display the availability of eachroom type in real-time.
    - **Booking:** Users can book a room by selecting the desired room type, check-in and check-out dates, and number of occupants.

3. **Food Service**
    - **Daily Food Selection:** Users can select food items for each day of theirstay
    - **Food Preferences:** Users can specify dietary restrictions or preferences(e.g.,vegetarian, gluten-free).
    - **Food Menu:**A menu of special food items will be available for users toselect from.

4. Payment Management

- **Payment Options:**Users can make payments using various modes such ascredit/debit cards, net banking, or wallets.
- **Payment History:**A record of all payments made by a user will be storedin their profile.

5. Feedback and Review

- **Service Feedback:**Users can providefeedback on various servicessuch as room cleaning, internetconnection, food quality,and overall experience.
- **Rating System:**Users can rate their experience on a scale of 1-5.

6.Reporting and Analytics

- **Booking Reports:** The application will generate reports on room bookings,occupancy rates,and revenue.
- **Customer Insights:** The application will provide insightson customer behavior, preferences, and feedback.

7.Security and Access Control

- **User Authentication:** Users will be authenticated using a secure loginsystem.
- **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

- **Search and Filter:** Users can search for available rooms by date, roomtype,and sharing options.
- **Booking Confirmation:** Once a bookingis made, the user will receive a confirmation email with details of their booking.
- **Payment Reminders:** The application will send reminders to users for pending payments.

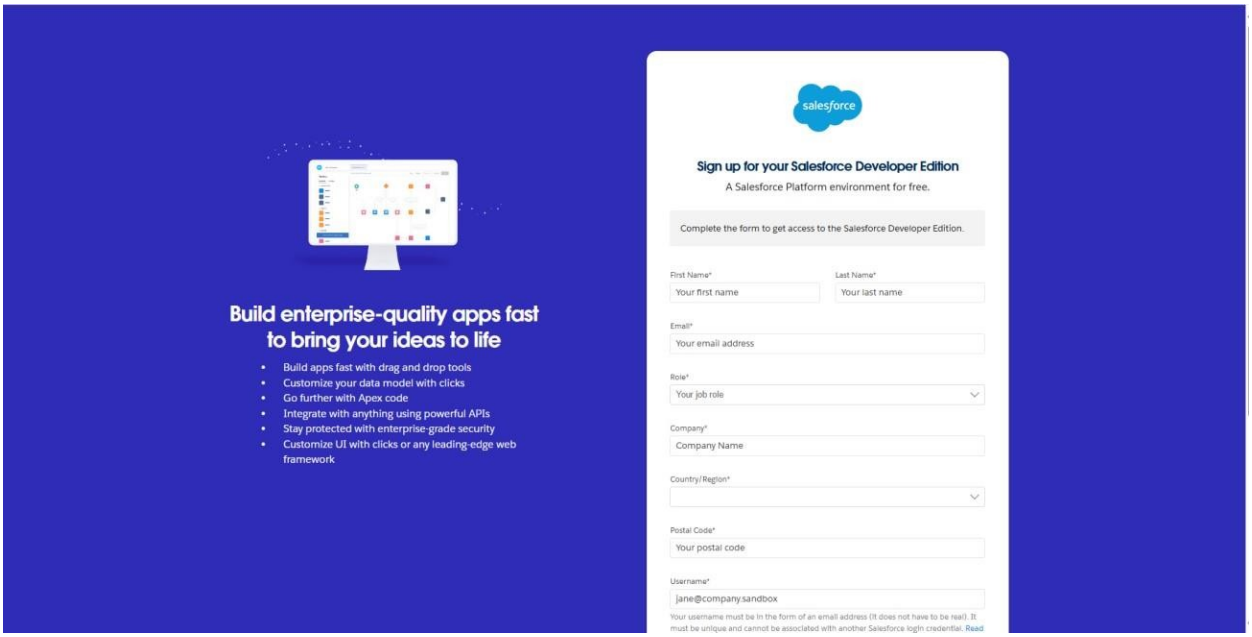
- **Feedback Notifications:** The application will send notifications to administrators when a user provides feedback.
- **Reporting and Analytics:** The application will generate reports and provide insights on customer behavior and preferences.

Milestone 1 - Introduction to Salesforce:

Whatis Salesforce?

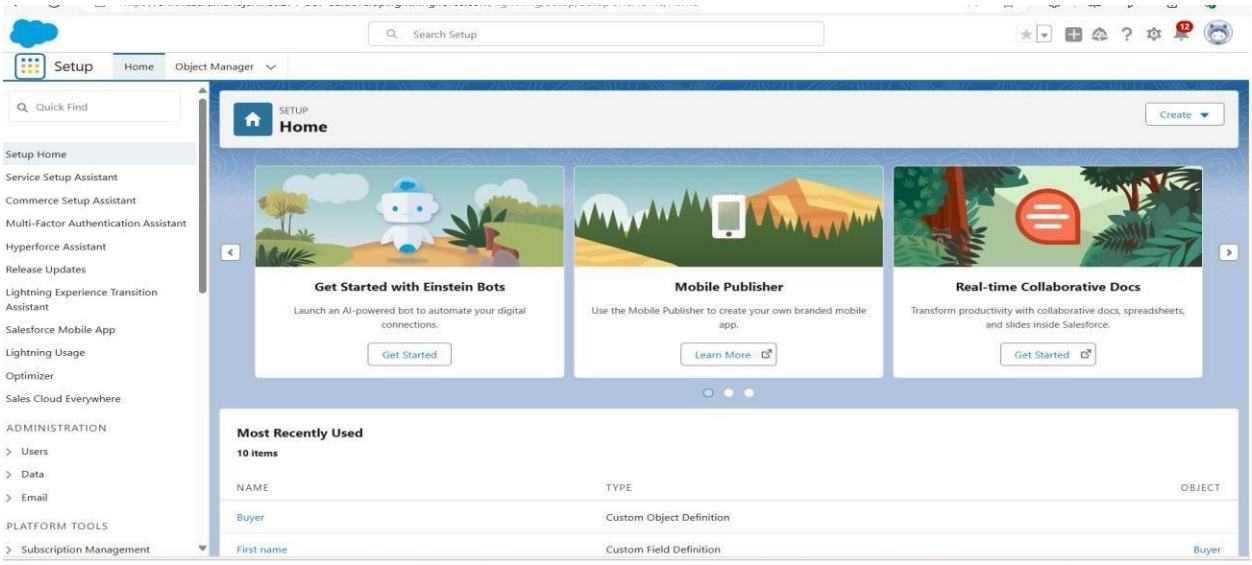
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate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

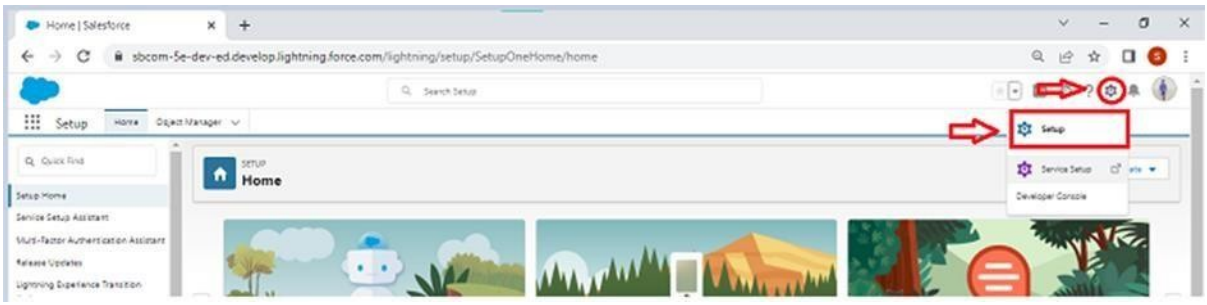
Salesforce objects are database tables that permit you to store data that is specificto an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided bysalesforce.com such as users,contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are objects createdby users. They supply information thatis unique and essential to their organization. They are the heart of any application and provide a data-sharing structure.

To Navigate to Setup page:

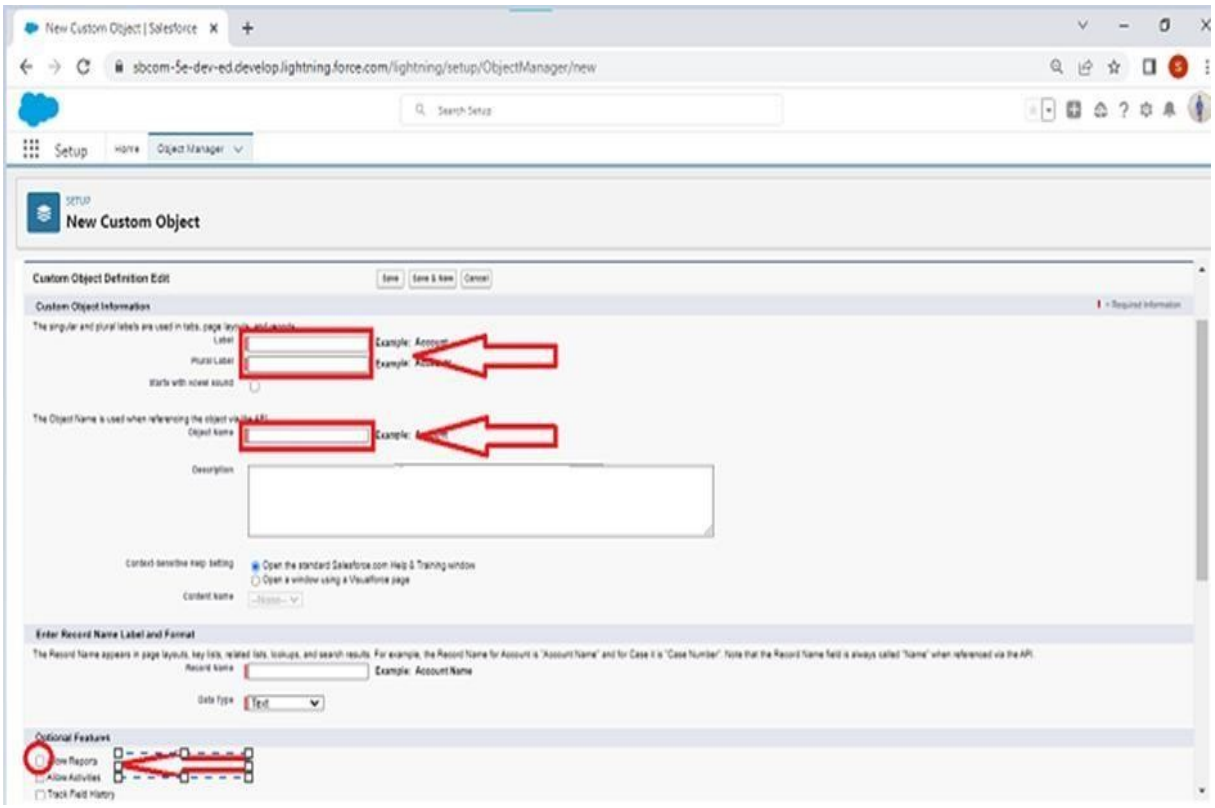
Click on gear icon ? click setup.

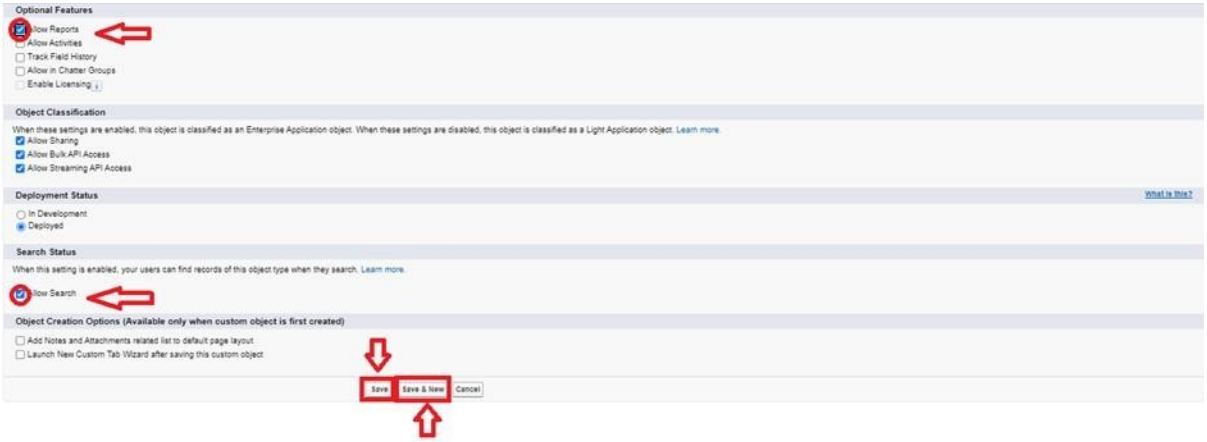


To create an object:

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

2. On the Customobject defining page:
3. Enter the labelname, and plural label name, click on Allow reports, and Allow search.





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..Enter the label name Supplier

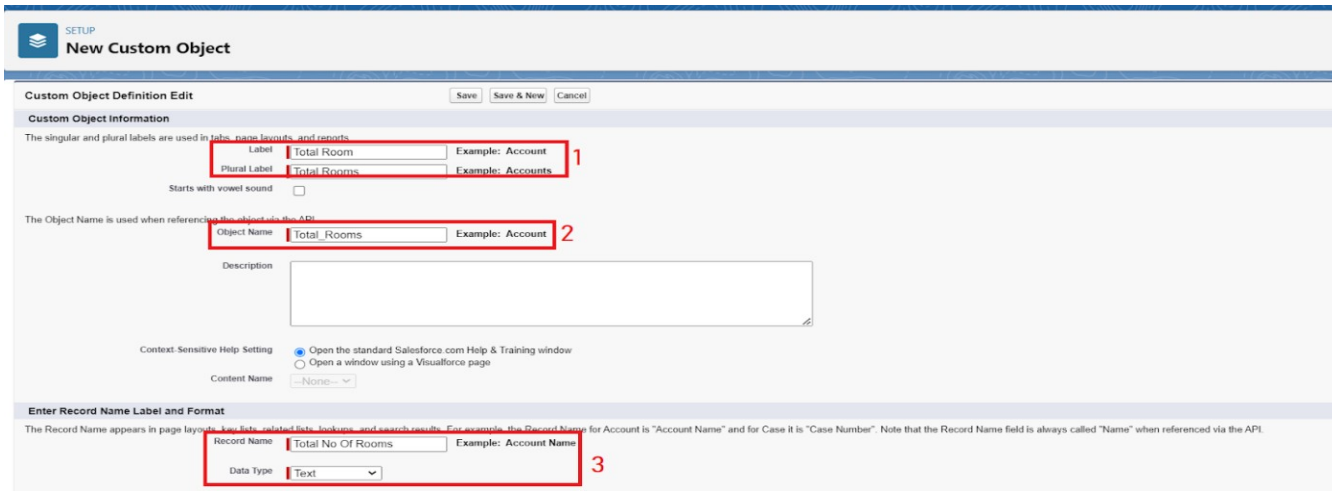
b. Plural label name? Suppliers
c. Fill in the labelas " Total Room ".

d. Fill in the plural label as " TotalRooms ".

e. Record name: "Total No Of Rooms"
f. Select the data type as "Text".

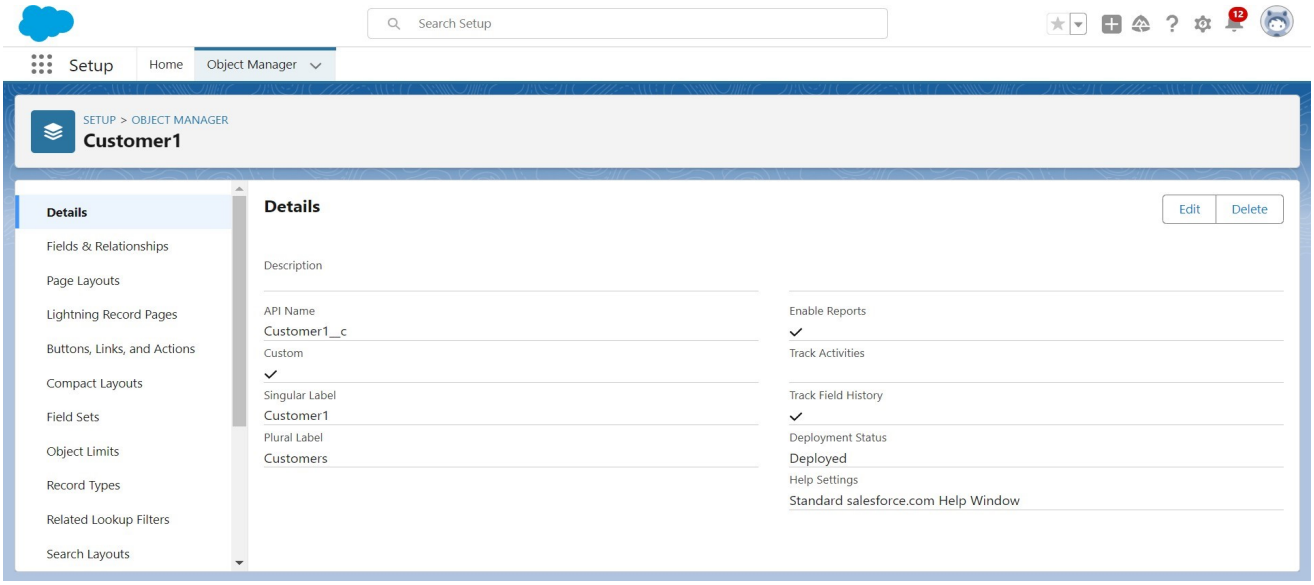
g. In the Optional Features section, select Allow Reports and Track Field History.

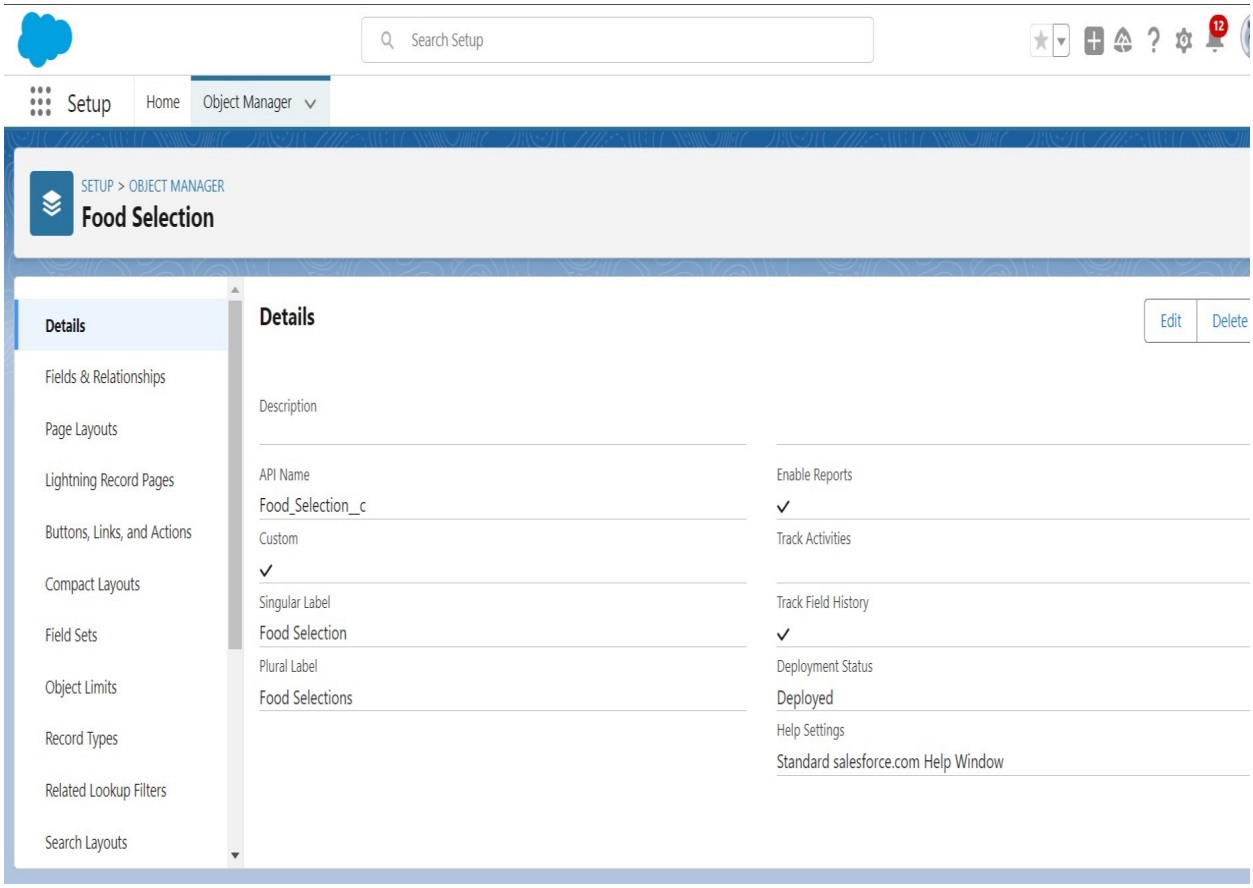
h. In the Deployment Status section, ensure Deployed is selected.
i. In the Search Status section, select Allow Search.
j. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.



k. Leave everything else as is, and clickSave.

Create a custom objects for Customers,Food Selection,RoomBooking


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer1
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Details
Edit
Delete
Description
API Name
Customer1__c
Custom
Singular Label
Customer1
Plural Label
Customers
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window


Search Setup
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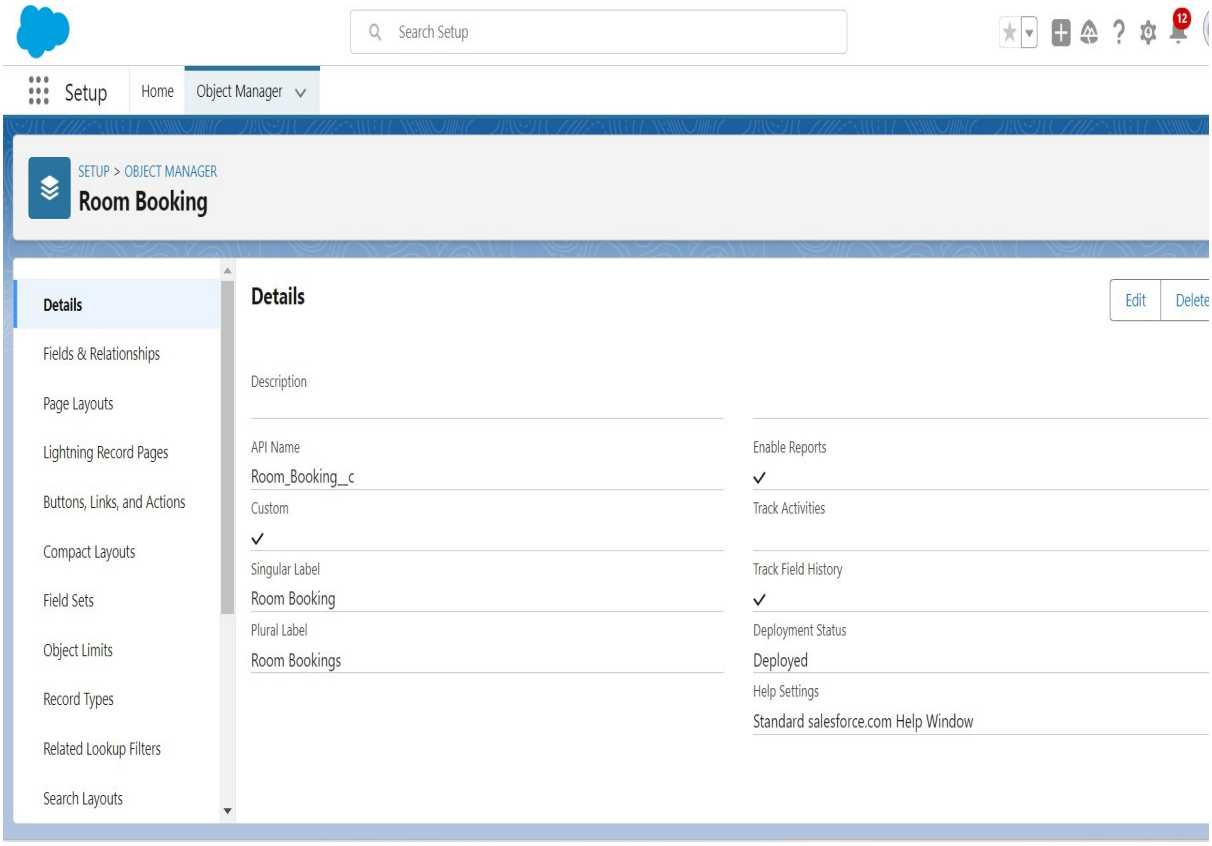


Milestone 3 - Tabs

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 quicklyaccess content and applications they frequently use without leaving the salesforce.com application.

3. **Visual force Tabs :**

   Visualforce Tabs are custom tabs that displaya Visualforce page.Visualforce tabs look andbehavelike 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.

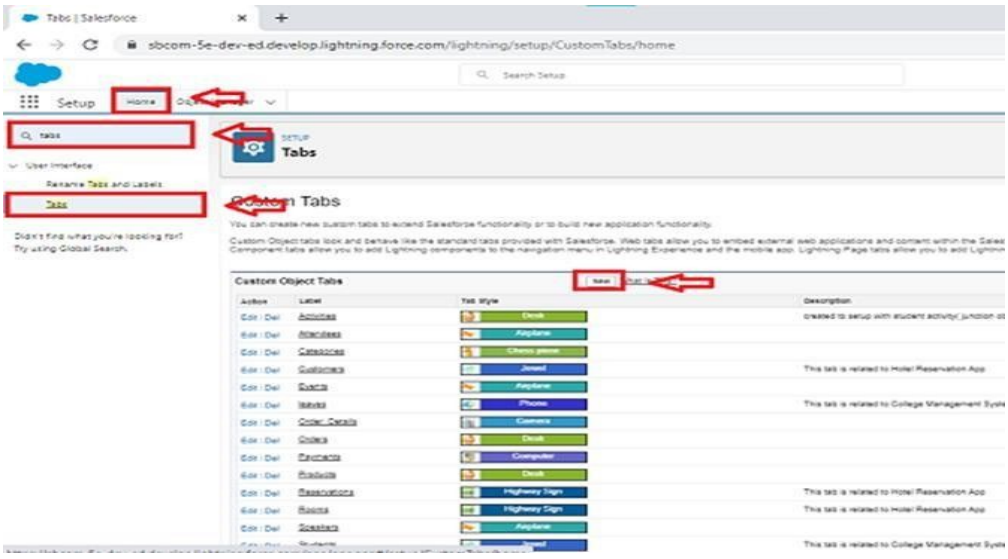
   Lightning Page tabs don't work like other custom tabs. Once created, they don't show up onthe All Tabs page when you click the Plus icon that appears to the right of your current tabs.Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

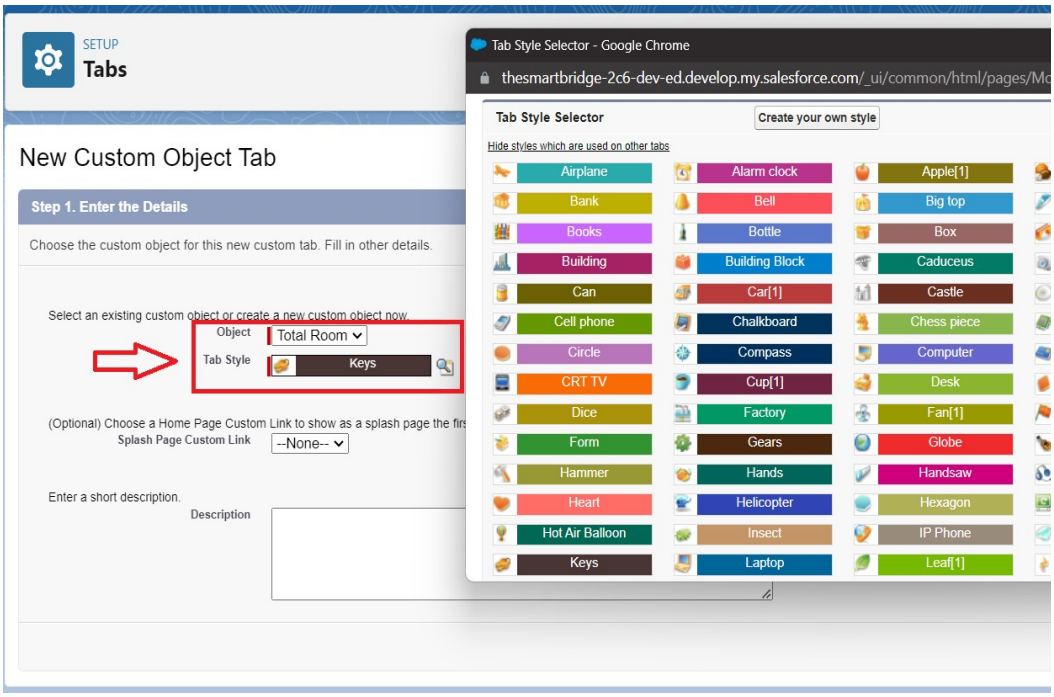
Activity 1: Creating a Tab Total

Rooms to create Tab:(Total

Rooms)

1. Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom objecttab)





Select Object(Total Rooms)> Select the tab style

Next (Add to profilespage) keep it as default

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

(Customers)

1. Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom objecttab)

2. Select Object(Customers) > Select the tab style> Next (Add to profiles page) keep it 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 c object tab)

2. Select Object(Room Bookings) ? Select the 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

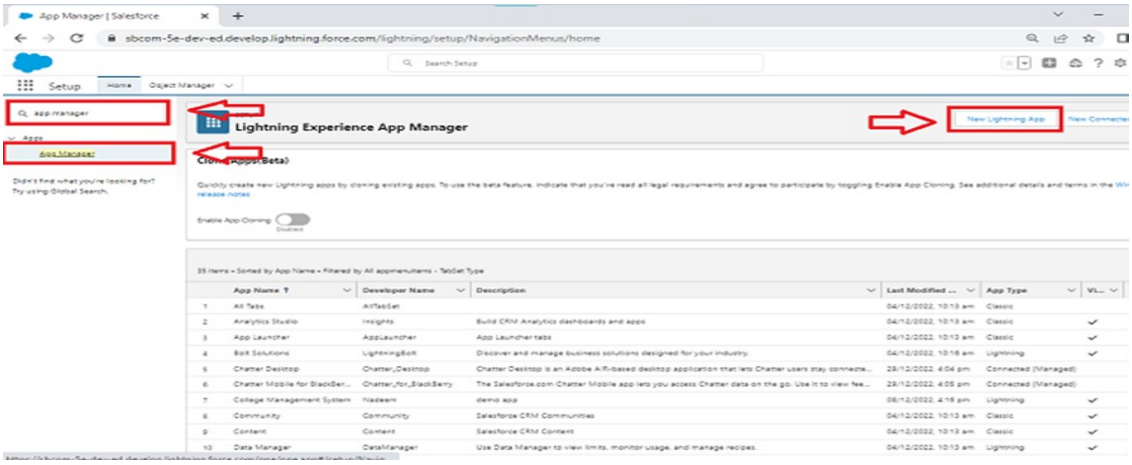
Now createthe tabs for Payments, Food Selections, Feedbacks Objects.

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.

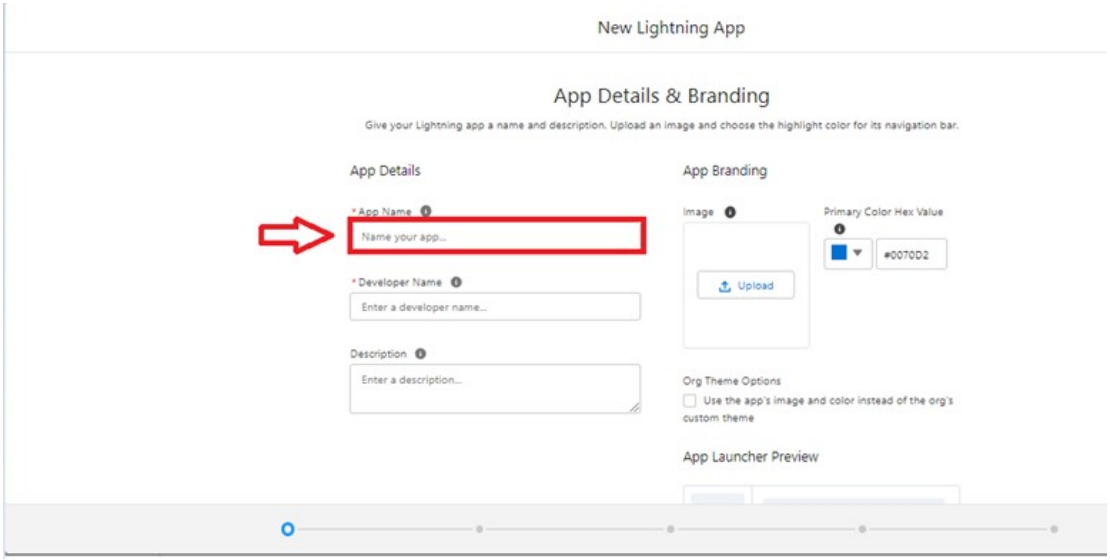
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Activity 1: To create a lightning app page:

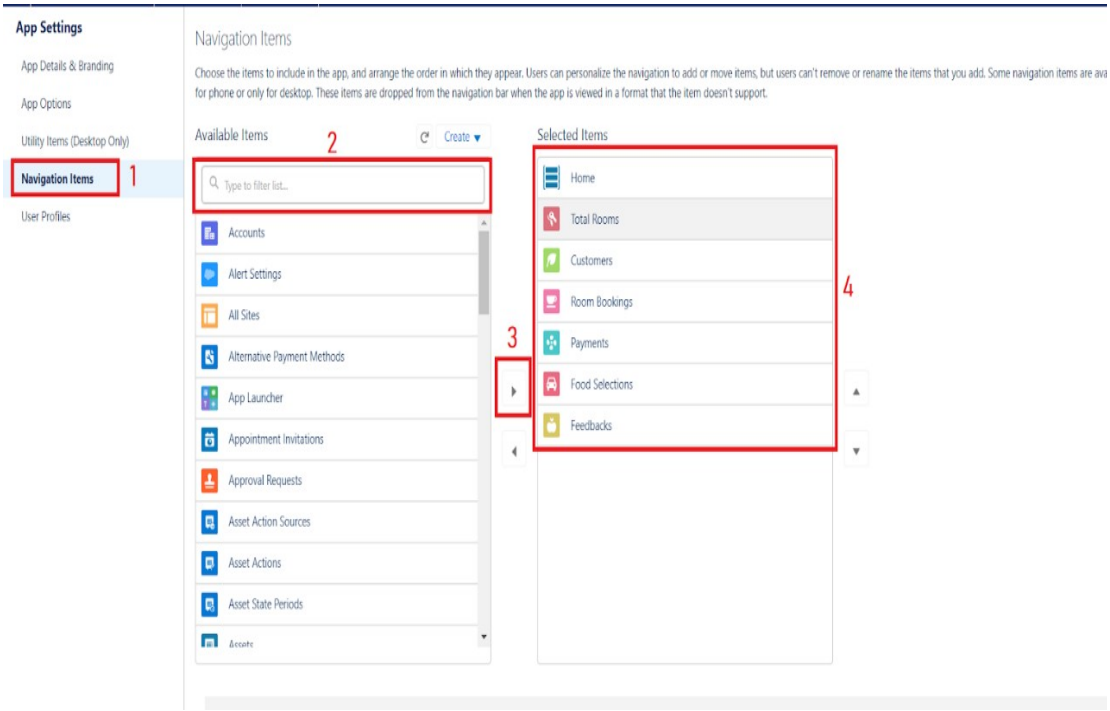


Go to setup page > search “app manager” in quick find > select “app manager” > click on Newlightning App.

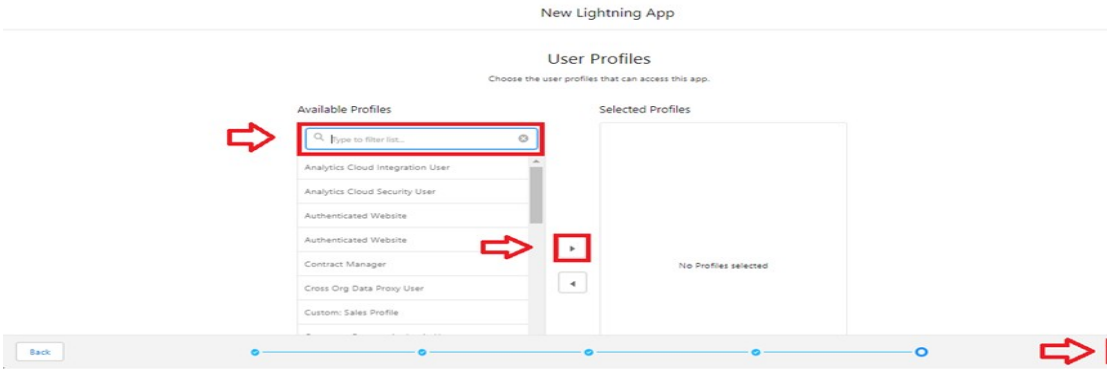
1. Fill the app name in appdetails and branding > Next > (App optionpage)
2. keep it as default > Next
   > (Utility Items) keep itas default > Next.



3. To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers1, Room Booking,Payments1, Food selection, Feedbacks, Reports and Dashboards) from the search bar and move it using the arrow button > Next.



To Add User Profiles:



Search profiles (System administrator) in the searchbar > click on the arrow button > save &finish.

Milestone 5 – Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuableinformation that you require for a specificobject. Hence,the overall searching, deletion, and editing of the records becomesimpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simplydelete a Standard Field untilit is a non required 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 commonin every Salesforce application. They are,

? CreatedBy

? Owner

? Last Modified

? FieldMade During objectCreation

Custom Fields:

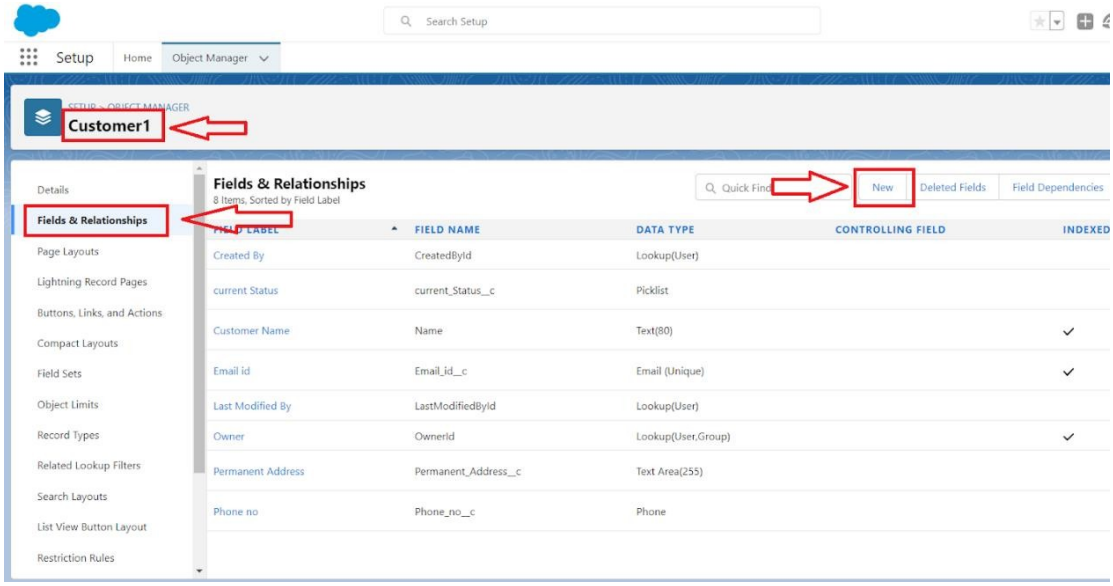
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. Itmeans you need not always include them in the records, unlike Standard fields. Hence, the final decision dependson the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

Activity 1: Creation of fields for the customer1 object

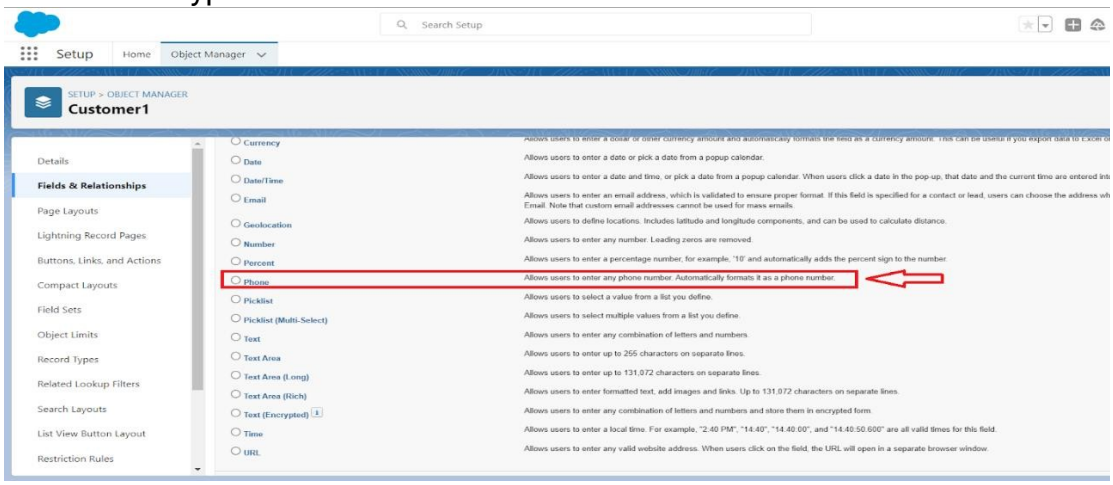
1. To create fieldsin an object:

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

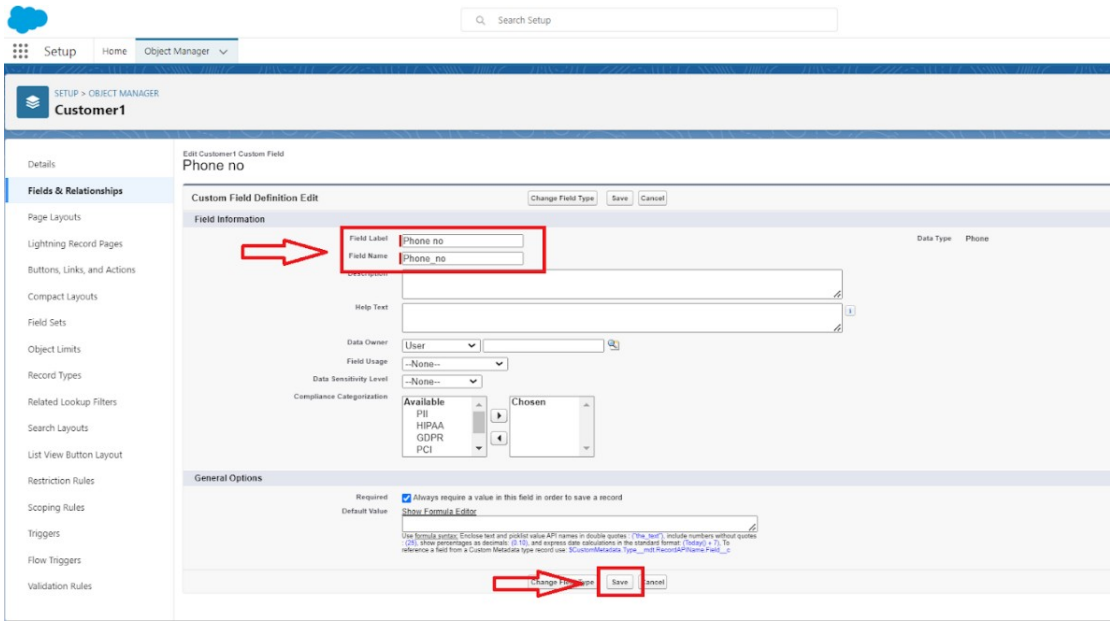
2. Now clickon “Fields & Relationships” > New



Select Data Type as a “Phone”



Click on next



Fill the Above as following:

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

2. To create another 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 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 fields in an object:

1. Go to setup > click on Object Manager> type objectname(Customer1) in searchbar >clickon the object.
2. Now click on “Fields &Relationships” > New

3. Select Data type as a “Picklist” and Click on Next

Fill the Above as following: Field Label: CurrentStatus

Value - Select enter values with each value separated by a new line

a. Student
b. Employee
c. Others

- Select required

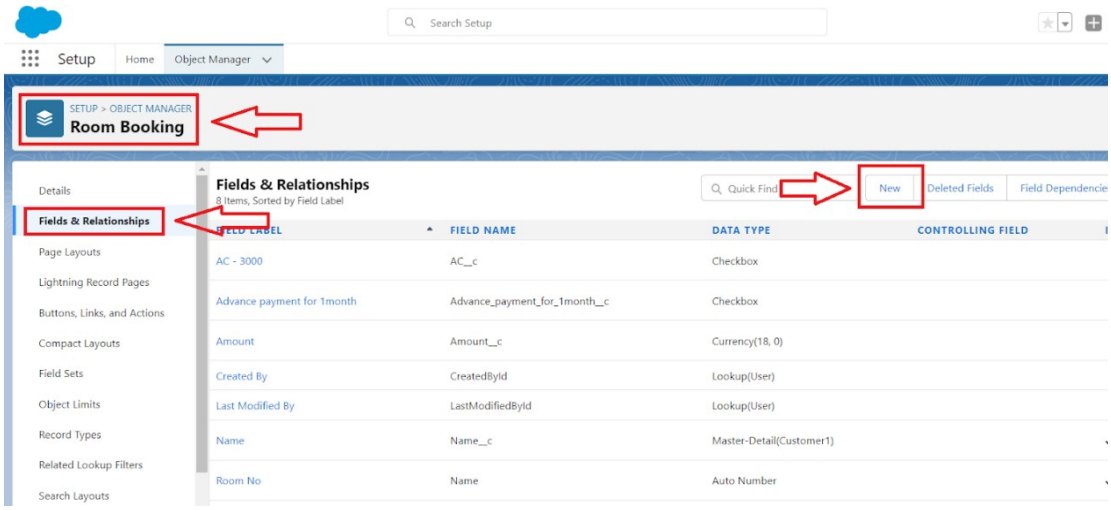
- Field Name :It’s gets auto generated

- Click on Next > Next > Save and new.

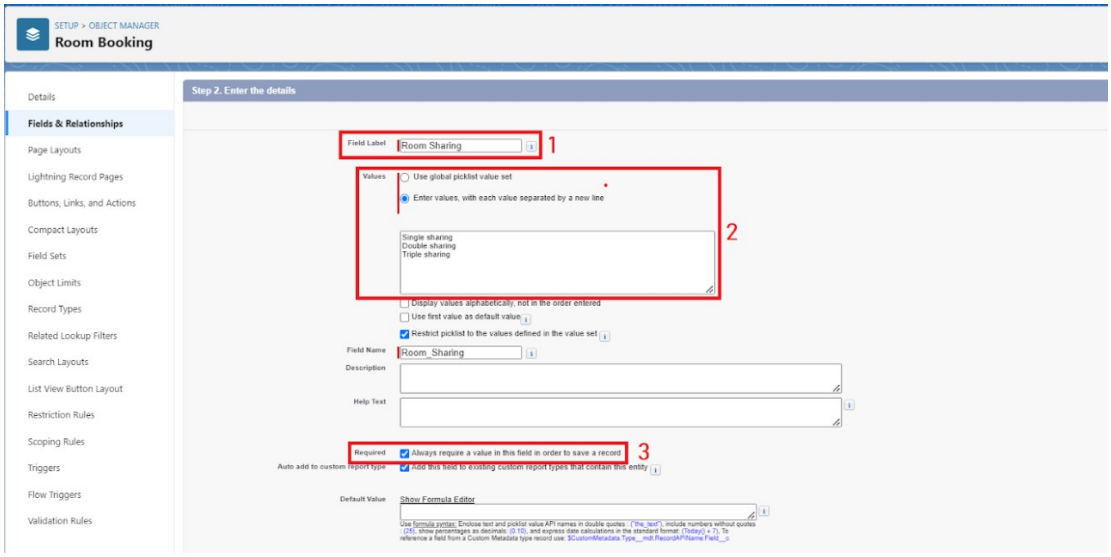
Creation of fields for the Room Bookingobject

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



1. Select Data Type as a “Picklist”
2. Click on Next



1. Fillthe Above as following:
    a. Field Label:Room Sharing
    b. Value - Select entervalues with each value separated by a new line

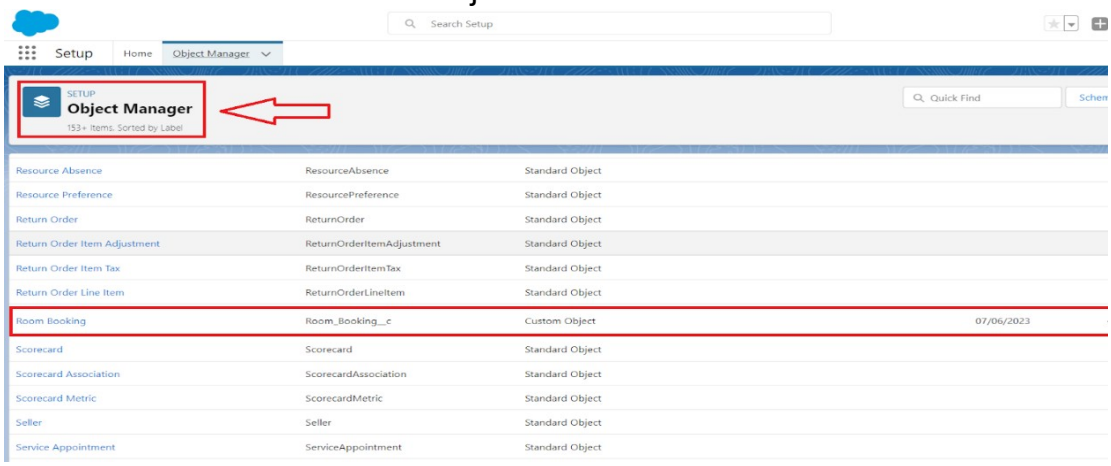
1. Single sharing
2. Double sharing
3. Triple sharing

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

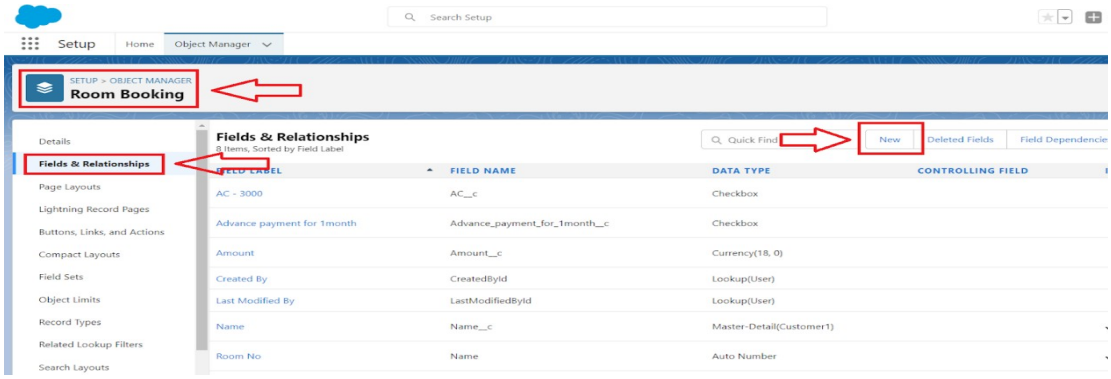
2. To Create a Fields & Relationship to an Room Booking Object

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.

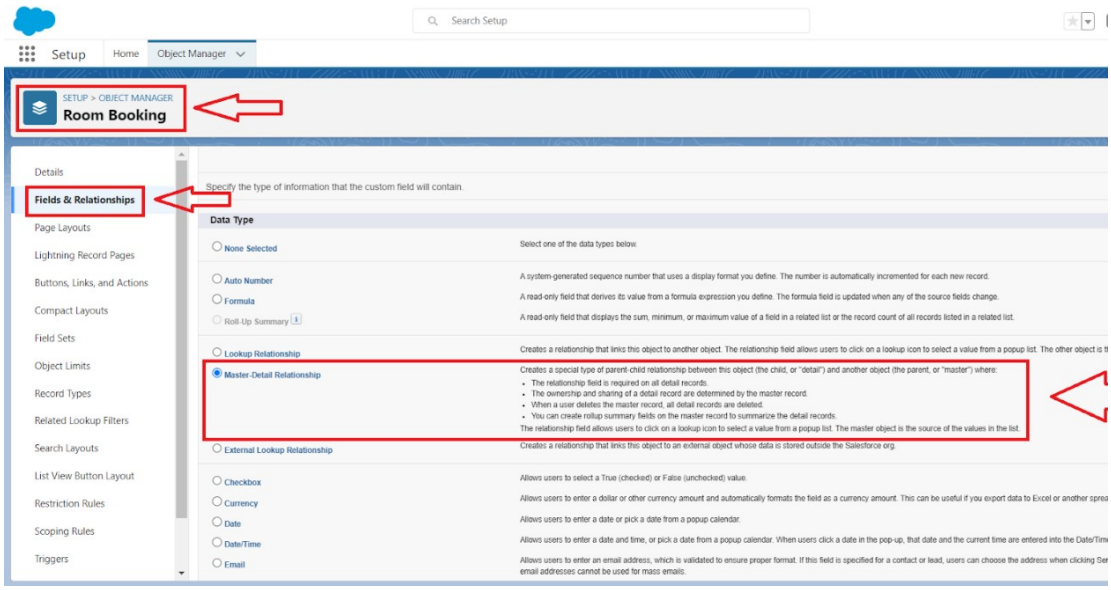


Now clickon “Fields &Relationships” > New

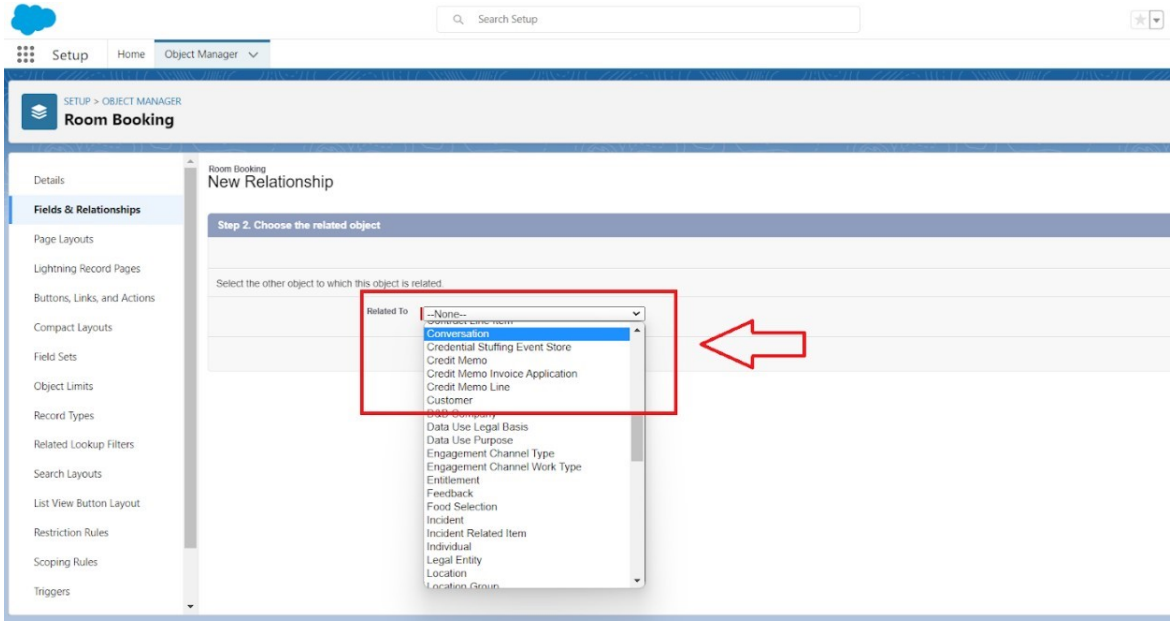


Select Data Type as a “Master-detail Relationship”

Click on Next

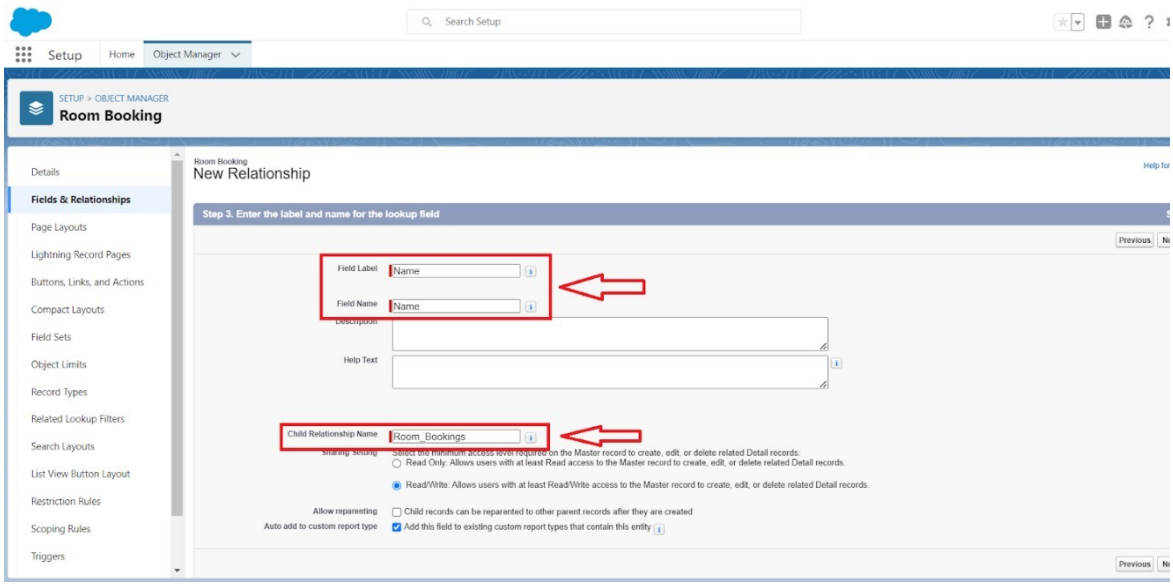


Click on the Related to drop down and Selectthe “Customer1” & Next.



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. Fillthe Above as following:

- Field Label: AC-3000
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new

4. To create fields in an object:

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

3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fillthe Above as following:

- Field Label: AdvancePayment for 1 Month
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new

5. To create fieldsin an object:

1. Goto setup ? click on Object Manager ? type object name(Room Booking) in the search bar ?clickon the object.
2. Now clickon “Fields &Relationships” ? New
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
- 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 FieldLabel: Total No Of Rooms
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

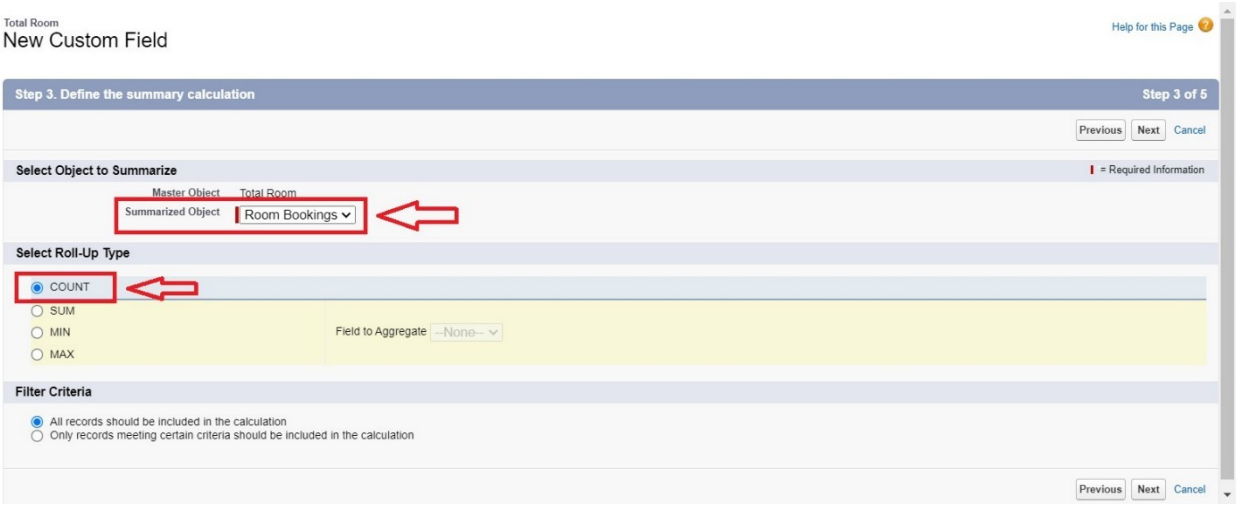
7. To Create a Rollup Summary Field in "TotalRoom Object"

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

- Fill the 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

   Select the count Radio button in the select Roll-up Type



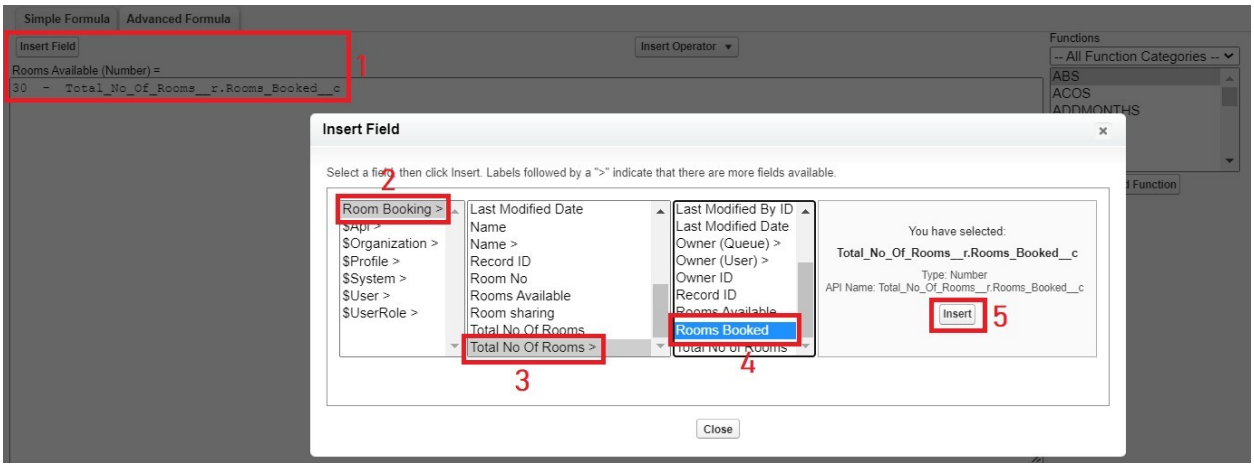
1. Click on Next > Next > Save and new

To create fields in an object:

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

Fill the Above as following:

- FieldLabel:Rooms Available
- Field Name : It’s gets auto generated
- Select the Formula Return Type as “Number”
- Select the Decimalplaces as “0” and Click onNext
- 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 inthe 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

Fill the Above as following:

- Field Label: Checkin
- 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

Fill the Above as following:

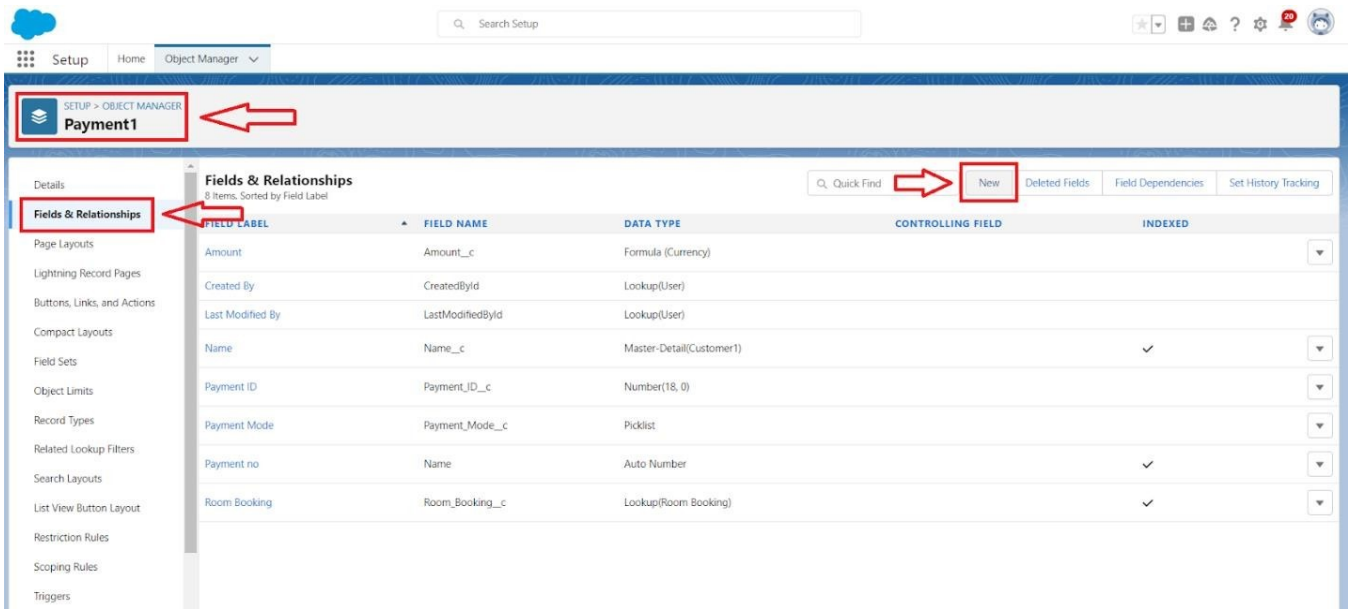
- Field Label: Check Out
- Field Name :It’s gets auto generated

- Click on Next > Next > Save and new

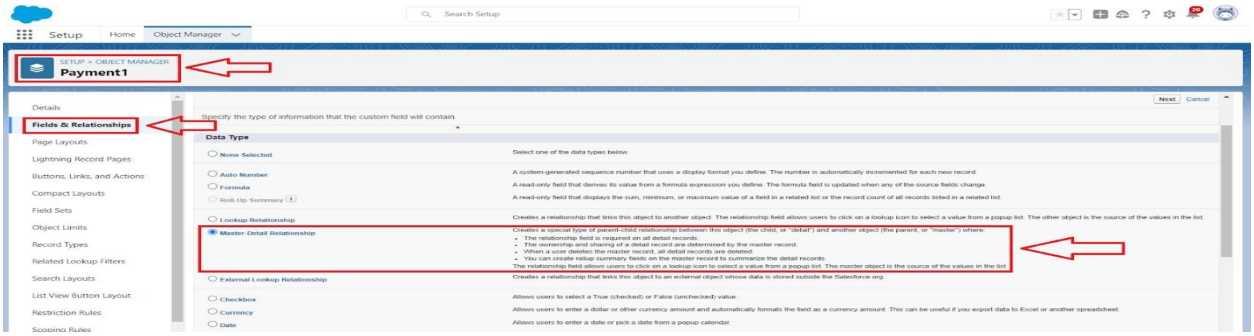
Creation of Fields & Relationship for Payment1 Object

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

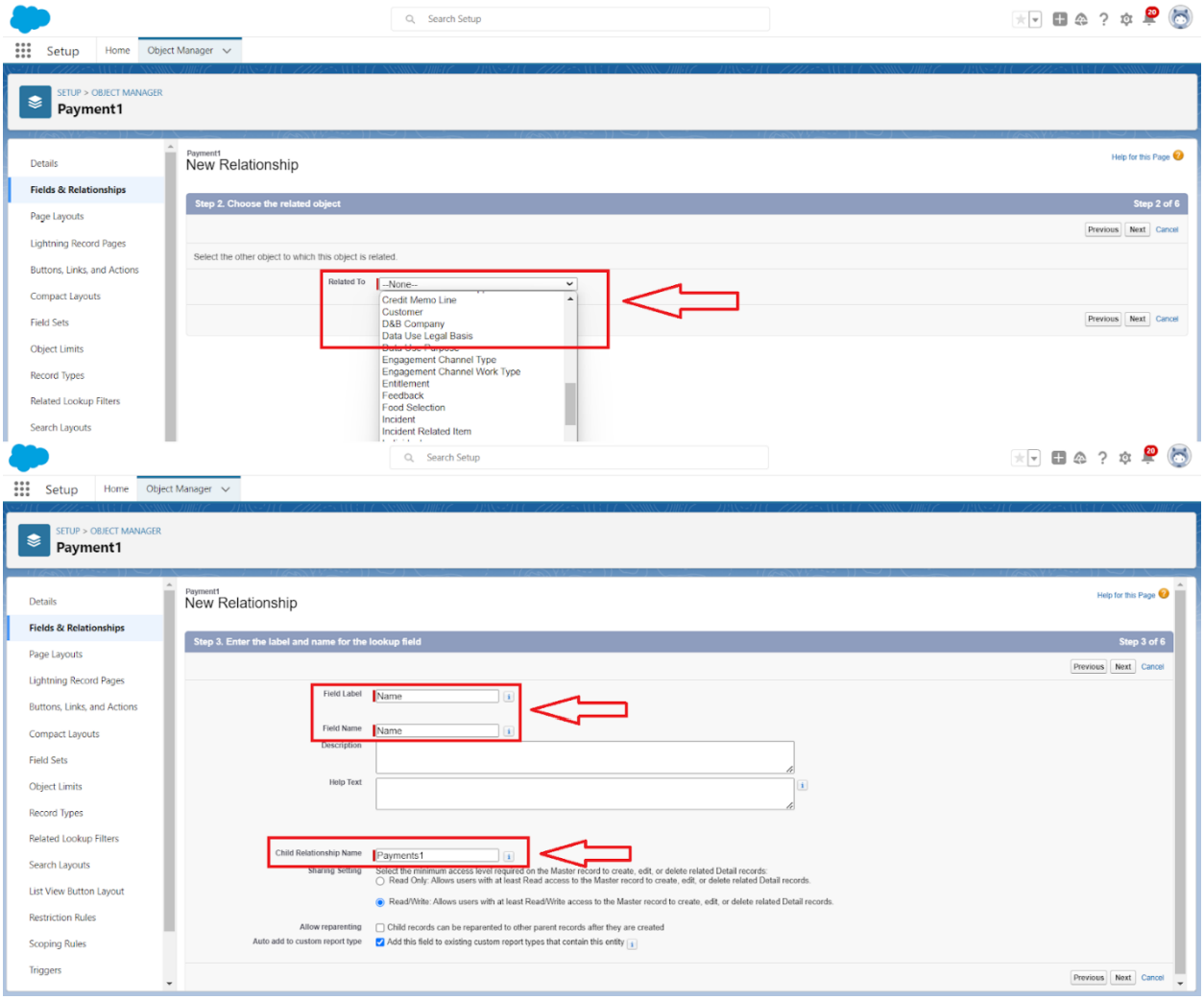


3.Select Data Type as a “Master-detail Relationship”



Click on Next

Click on the Related to drop down and Select the Customer1 objectand click on Next

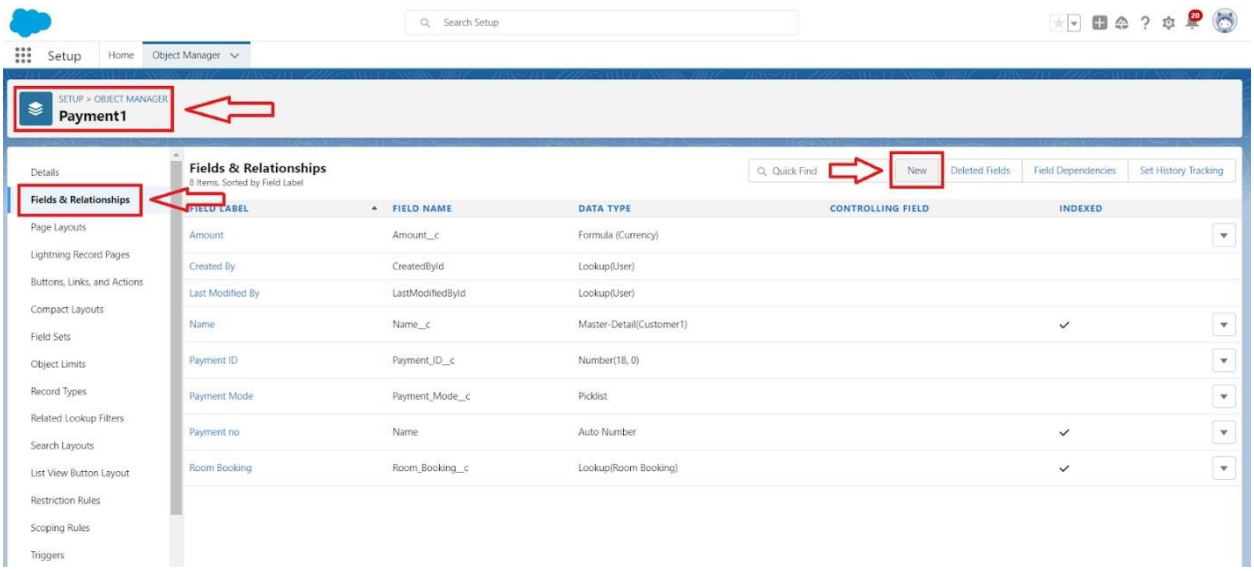


1. Fill theAbove as following:

- Change the Field Label:Name

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

2. To create another fields & relationship to an object

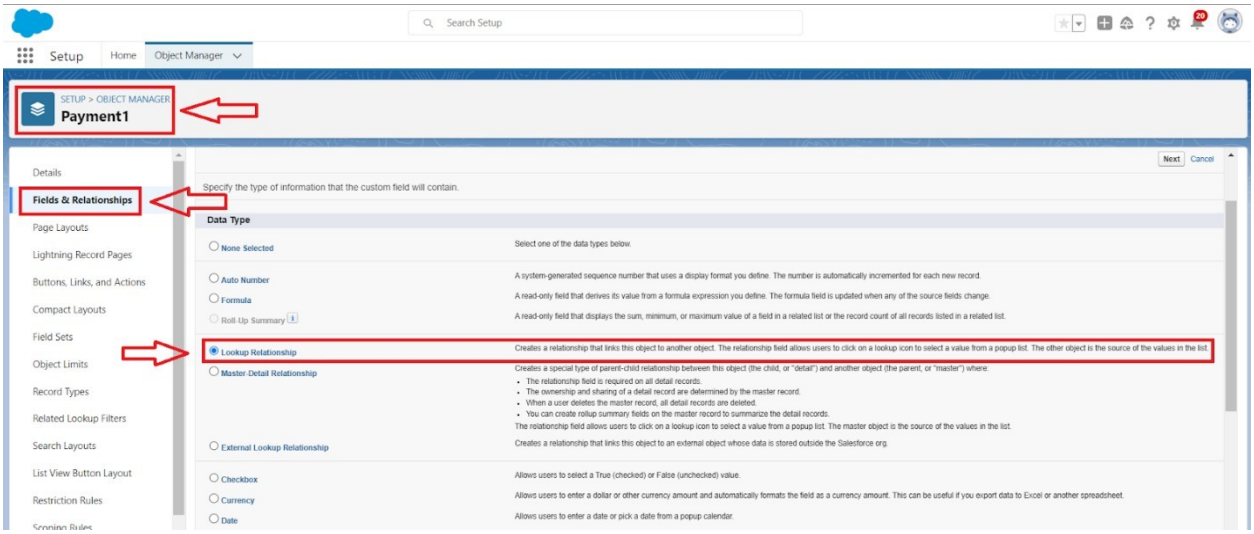


Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on theobject.

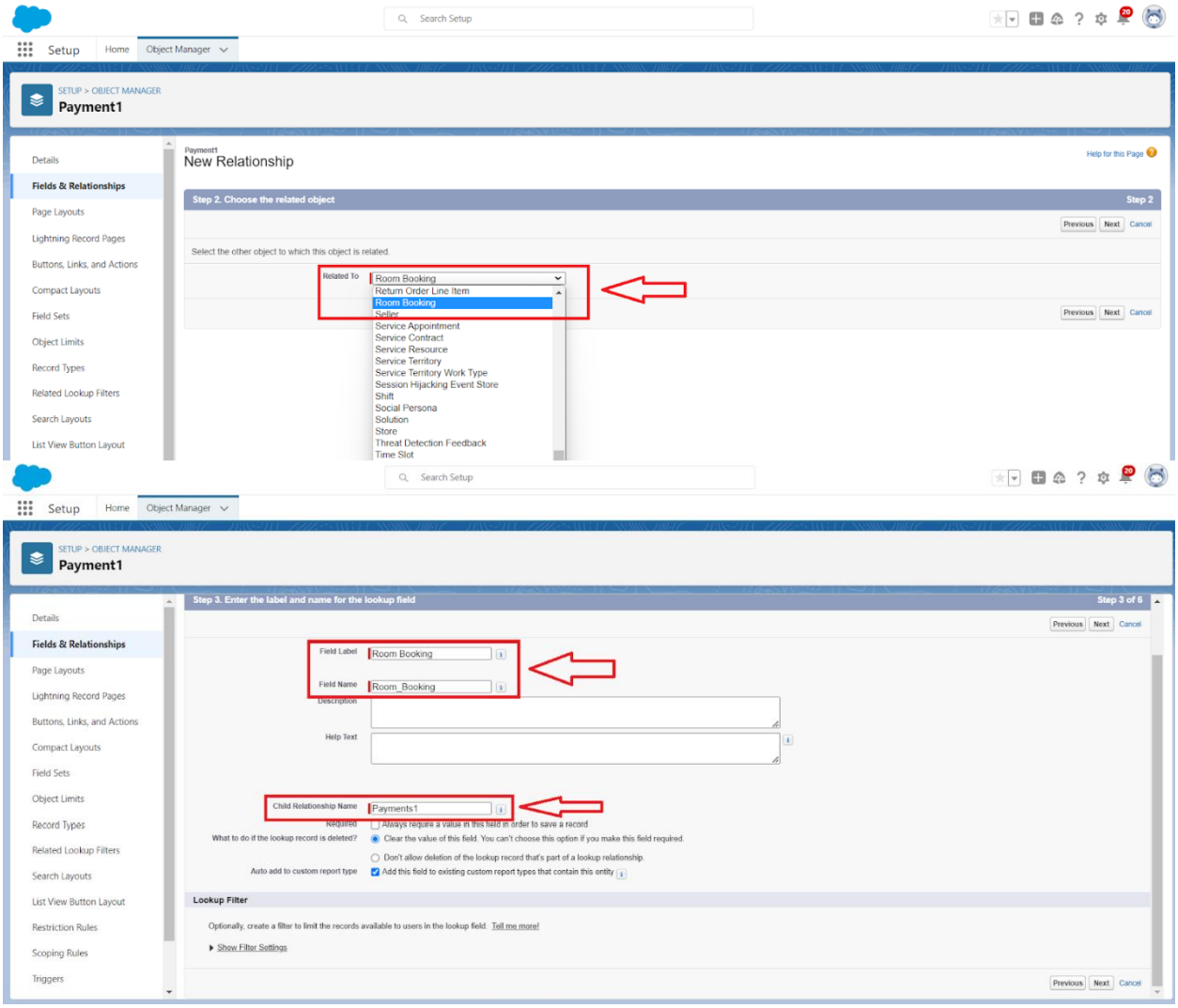
Now click on “Fields & Relationships” > New

Select Data Type as a “LookupRelationship”

Click on Next



Click on the Related to drop down and Select the Room Bookingobject and click on Next



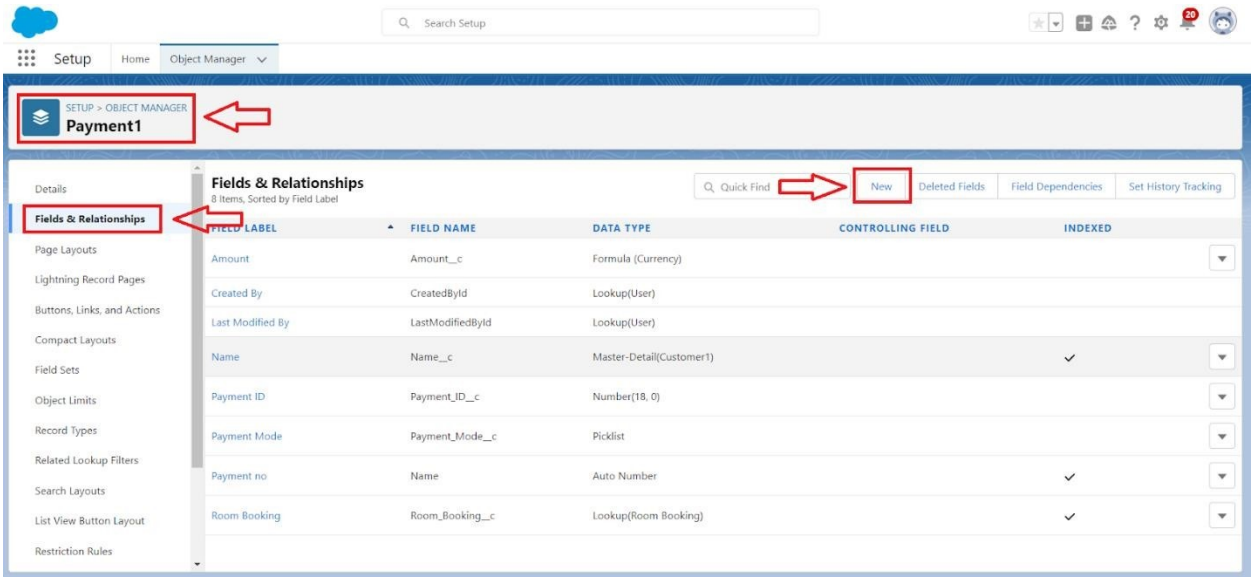
.Fill theAbove as following:

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

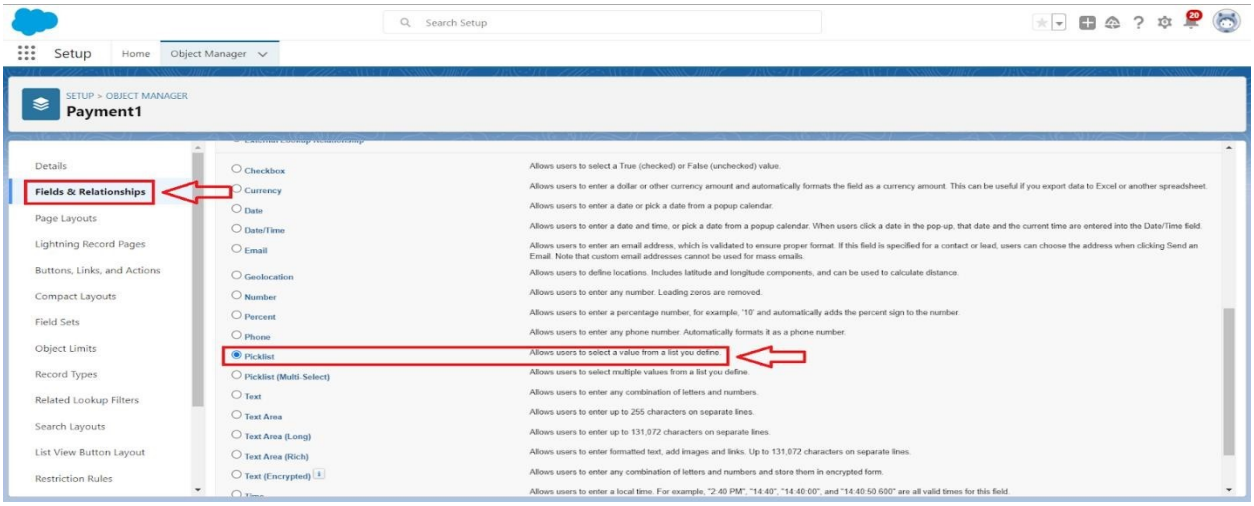
3. Creation of another fields for the Payment1 object

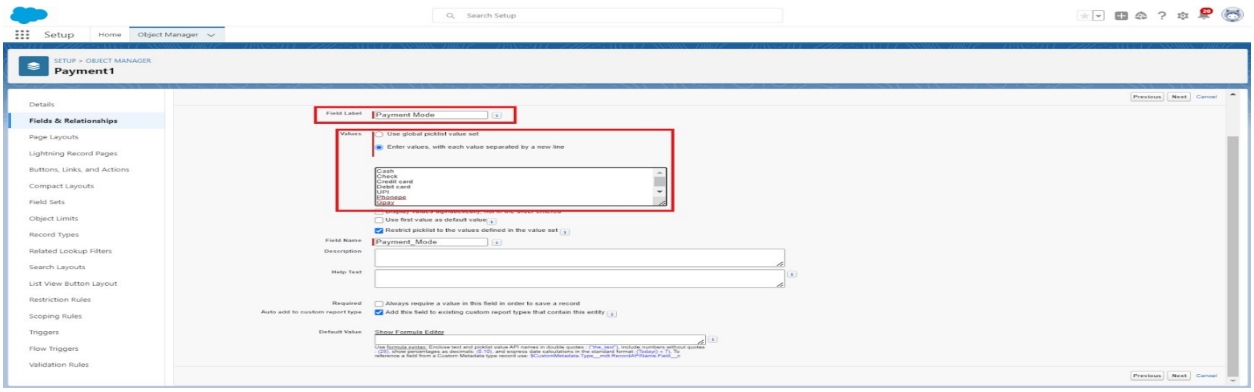
To create fieldsin an object:

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



Select Data Type as a “Picklist”





Fill the Above as following:

- Field Label:Payment Mode
- Value - Select enter values 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 Object Formula Field:

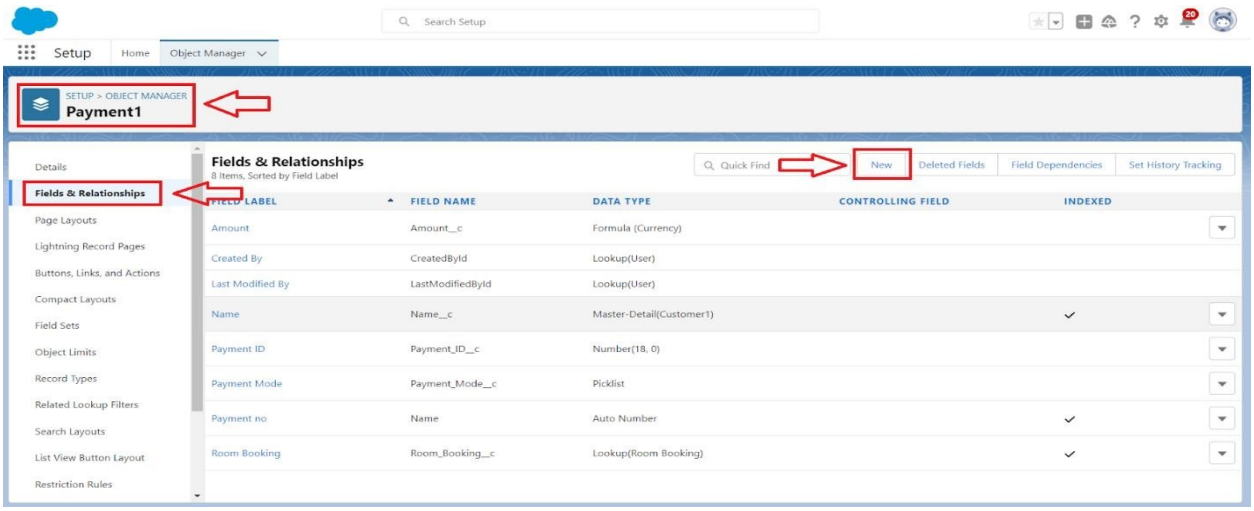
In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code orcomplex workflows.

Why do we need to 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 object formula 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

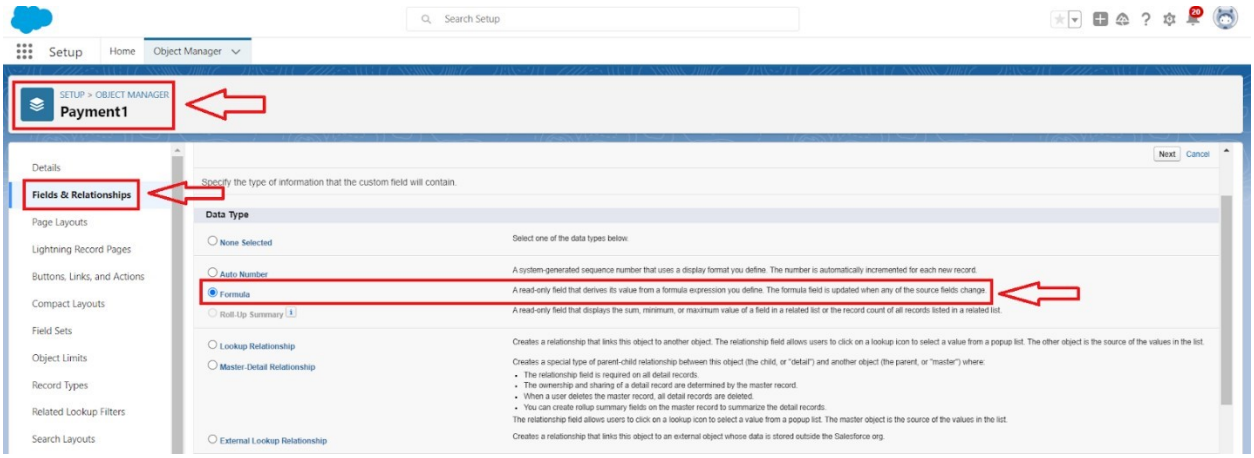


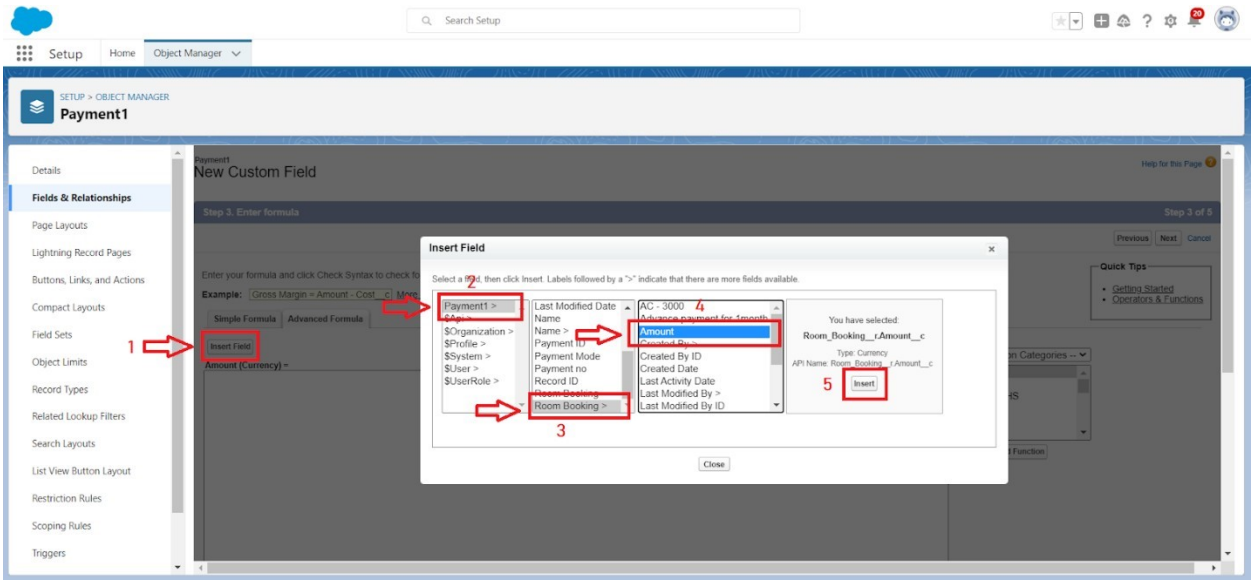
Select Data Type as a “Formula”

Click on Next

Enter the Field label: Amount and Field name: gets auto generatedand click on Next

In the Advanced FormulaClick on the Insert field in the popup Screen Select 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 ”.





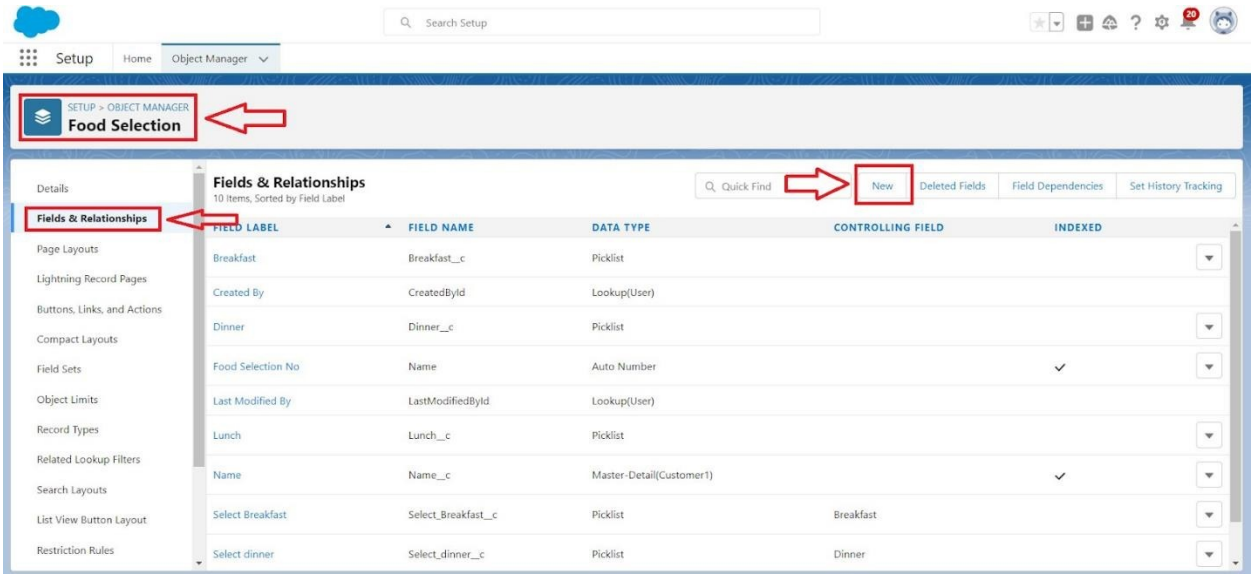
1. Click on the Check syntax:No syntax errorsin merge fields

2. Click on Next > Next > Save and new.

Creation of fields for the Food Selection object

1. To create fields & relationship to an object:

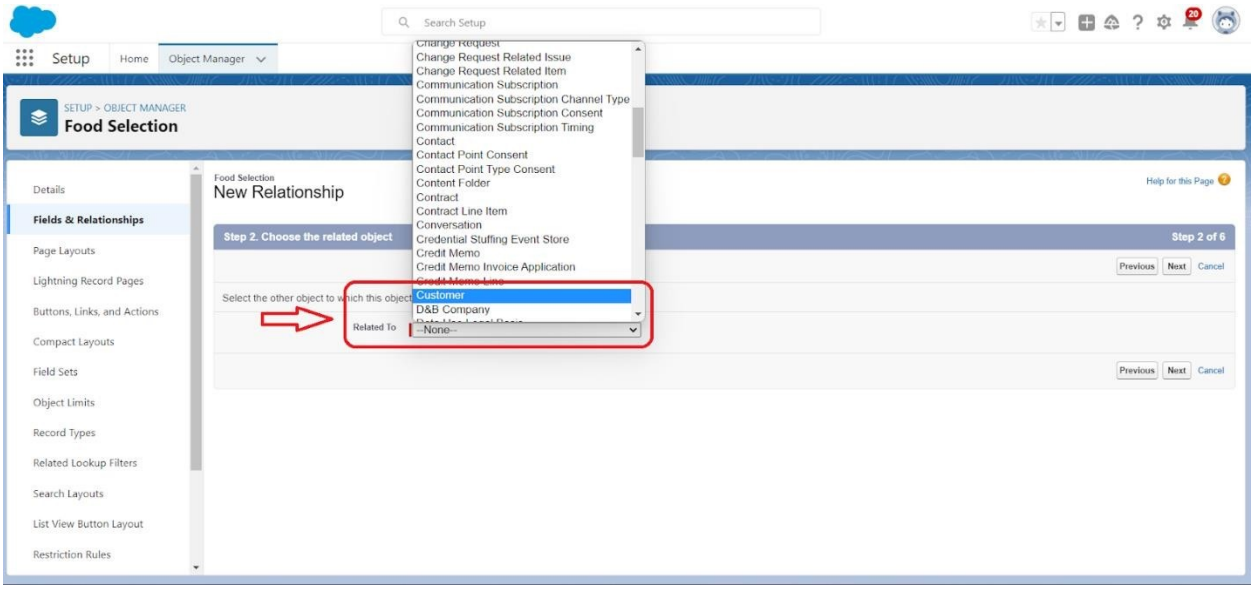
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > clickon the object.
2. Now click on “Fields& Relationships” > New



Select Data Type as a “Master-detail Relationship”

Click on Next

Click on the Related to drop down and Select the Customer1 object and click on Next



Fill the Above as following:

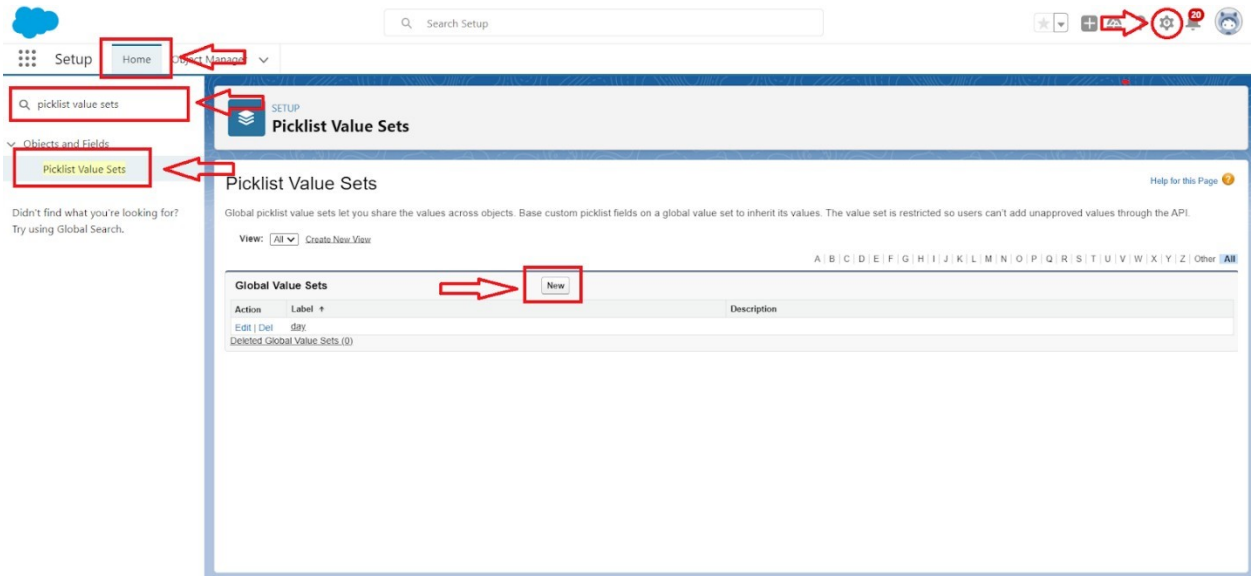
- Change the Field Label:Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

Picklist value sets:

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

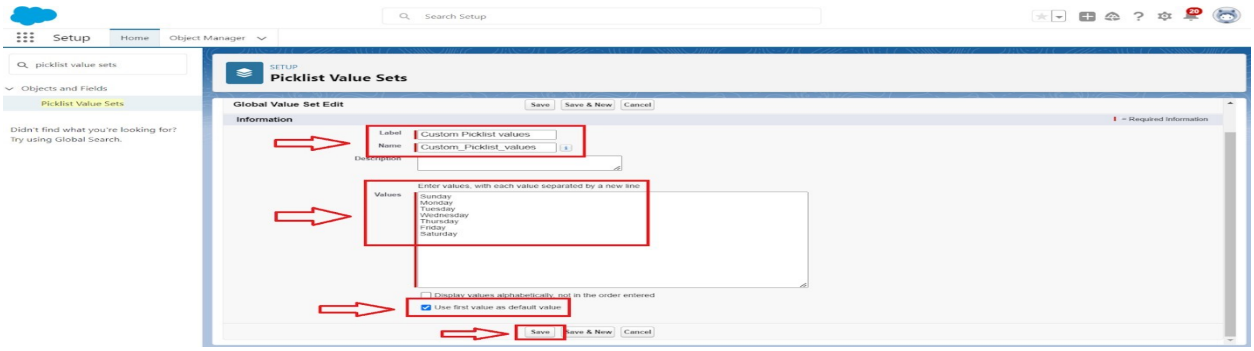
Create a picklist value set:

1. First click on gear icon and click on setup
2. Click on home tab in the Quick find box search for the " Pick list value sets "
3. Click on the Pick list value set and click on new



Enter the Label name and API name automatically Generate
Enter the values with each value separated by a new line

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

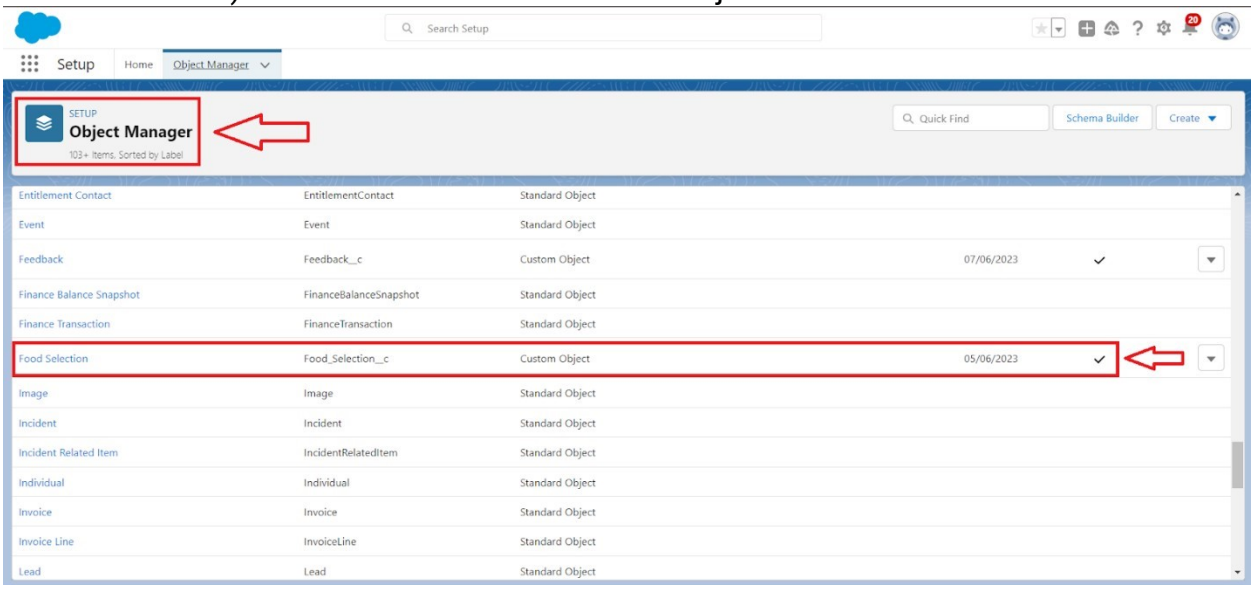


Check the Use first value as defaultvalue and Click on save.

2. Createa picklist Field for Food selection object

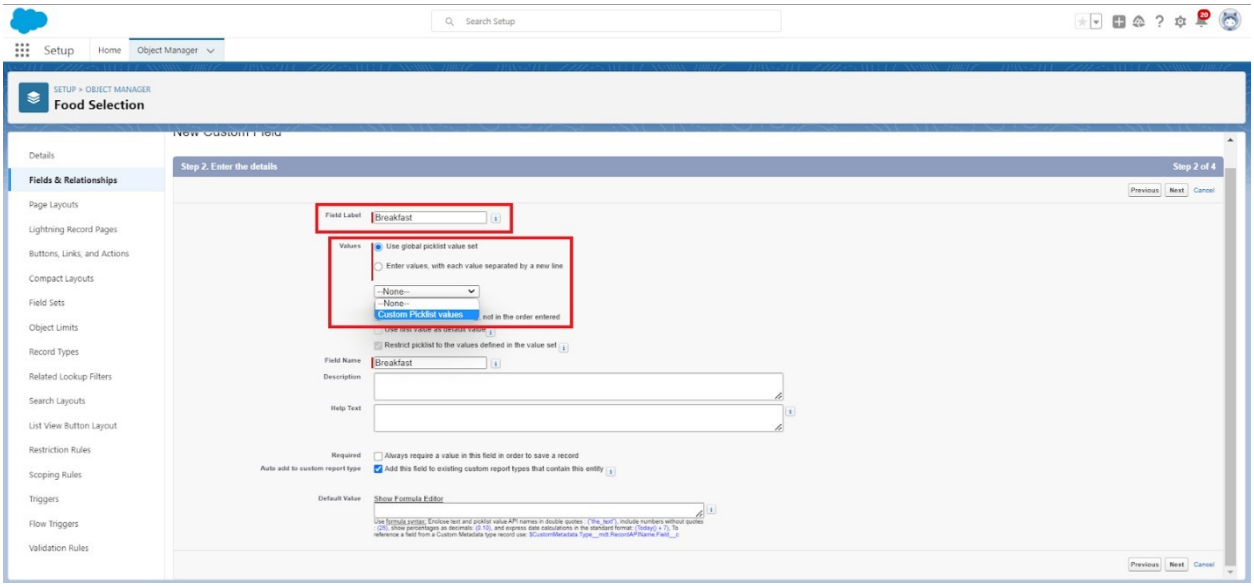
To create fields in an object:

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



Now click on “Fields& Relationships” > New

Select Data Type as a “Picklist”



Fill the Above as following:

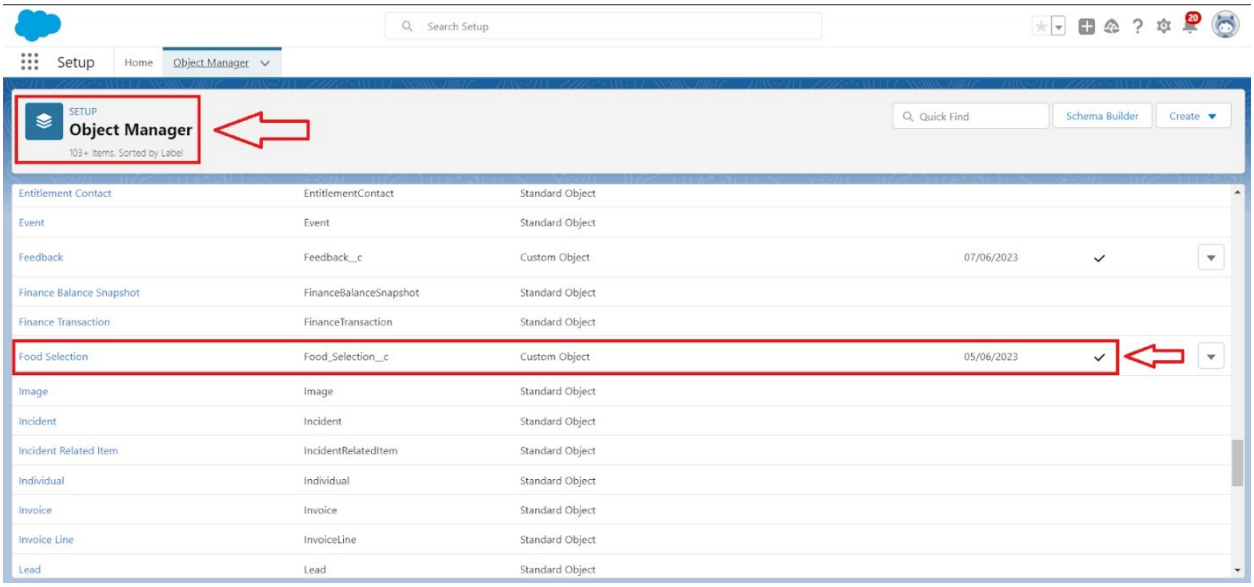
- Field Label: Breakfast
- Under Value - Selectthe Use global picklist valueset
- Under the drop down select the Custom PicklistValues

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

3. Create a another picklist Field for Food selection object

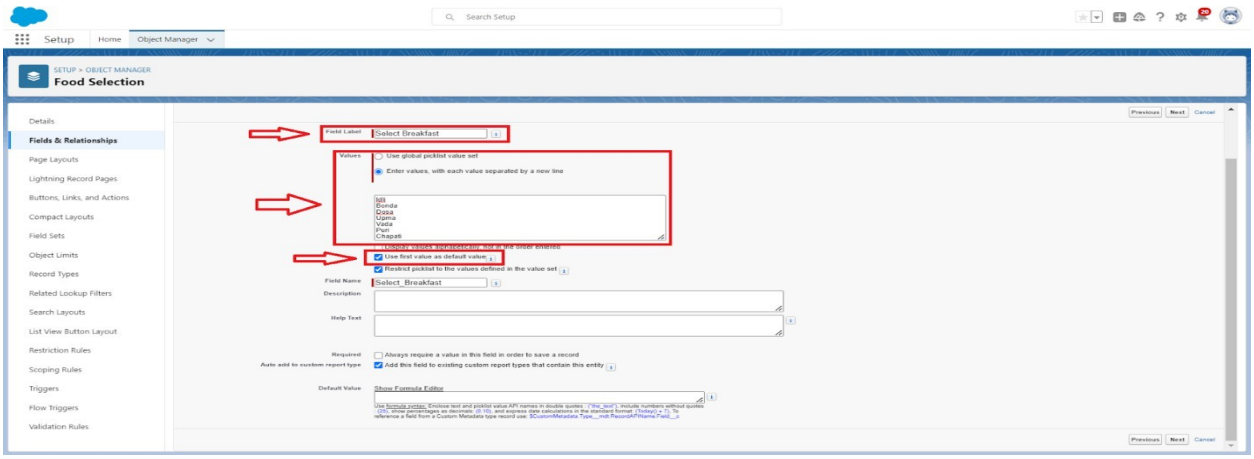
To create fields in an object :

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



.Now click on “Fields& Relationships” > New

Select Data Type as a “Picklist”



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 Check box Use First value as defaultValue

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

Field Dependency:

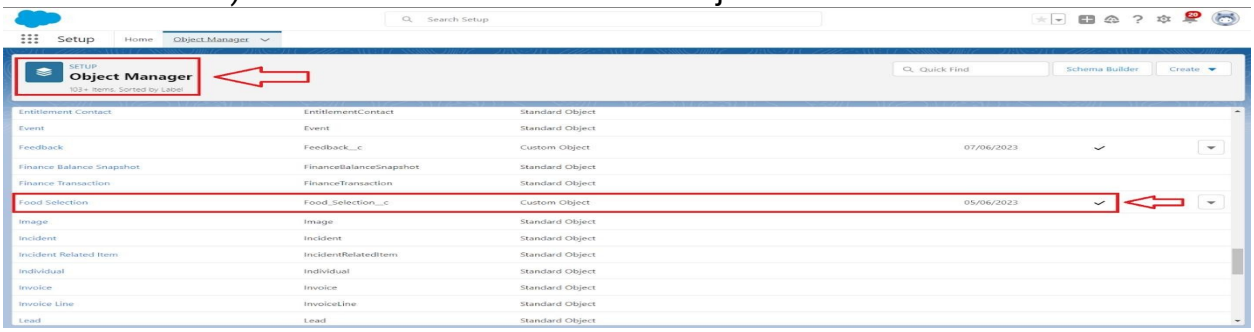
A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by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

Need to use Field Dependency:

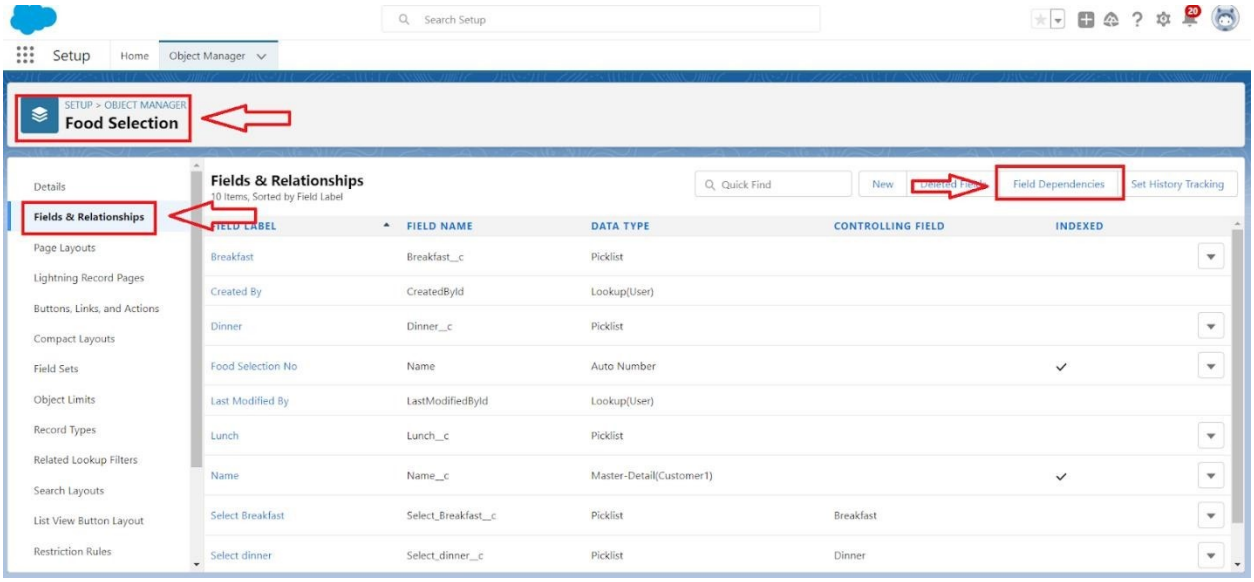
By using the field dependency we can get the differentValues by selecting the different Picklist.

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

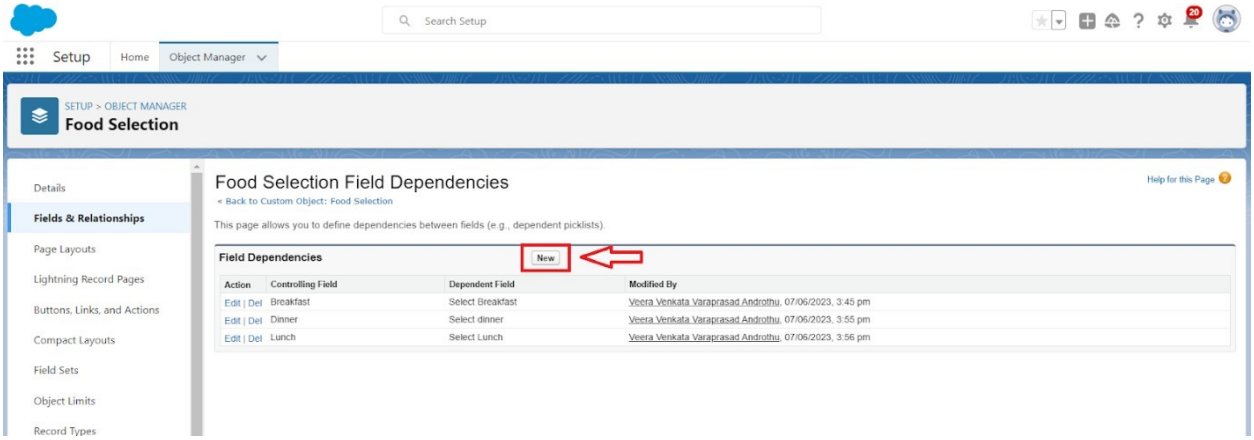
1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > clickon the object.



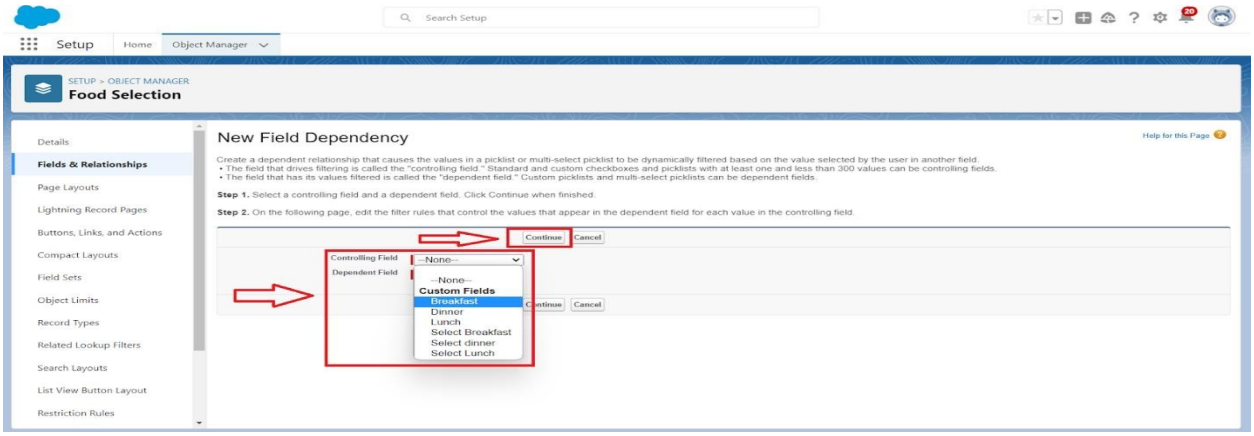
Now Click on fields & relationships and Click on Field Dependencies



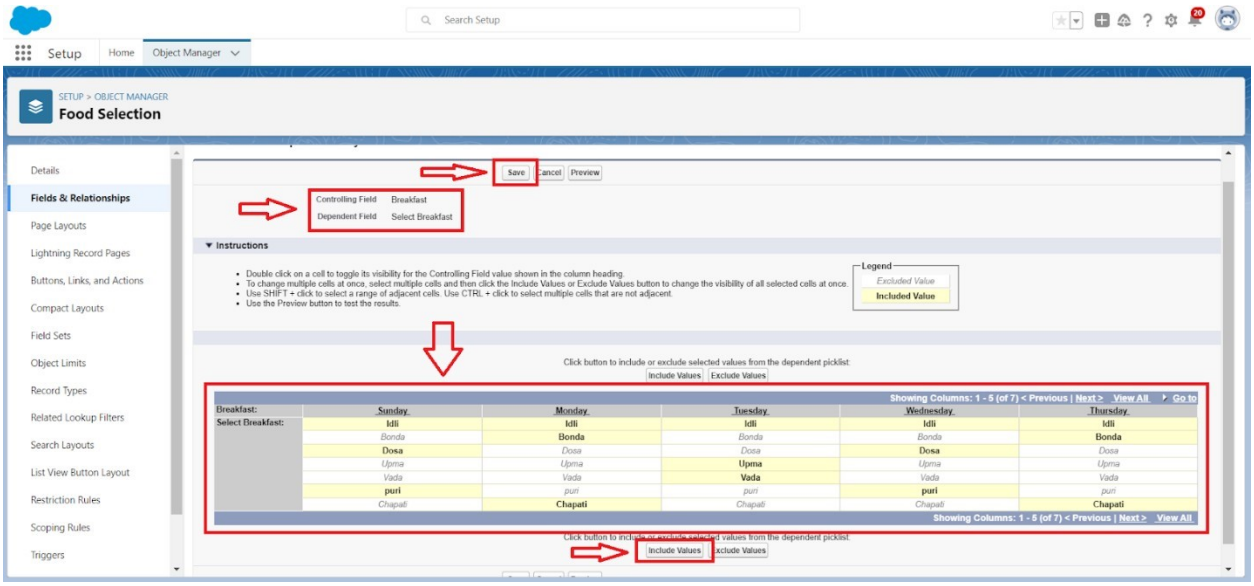
Now Click on New Option



Under Controlling Field: Breakfast, Dependent Field: Select Breakfast and Click on Continue



Under the Sunday Ctrl and selectthe Picklist values Idli,Dosa,Puri and Click on Include Values such a way that do for the remaining days and click on save.



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 the Above as following:

- Field Label:Lunch
- 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.

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 the Above as following:

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

1. Meals
2. Chicken biryani
3. Veg biryani
4. Veg fried rice
5. Egg fried rice
6. Chicken fried rice
7. Curd rice
8. Tomato rice
9. Egg noodles
10. Chicken Noodles
11. Bhagara rice

- Select Checkbox Use First value as default Value
- 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: Select Lunch and Click on Continue
5. Under the Sunday Ctrl and select the Picklist values Chicken biryani, Egg fried rice, curd rice andClickon 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 > clickon 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 PicklistValues

- 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 > clickon the object.
2. Now click on “Fields& Relationships” > New

3. Select Data Type as a “Picklist”

Fill the Above as following:

- Field Label:Select Dinner

- Under Value - Entervalues, with each value separated by a new line

    a. Meals
    b. Chicken biryani
    c. Vegbiryani
    d. Vegfried rice
    e. Eggfried rice
    f. Chicken fried rice
    g. Curdrice

h. Tomato rice
i. Eggnoodles
j. Chicken Noodles
k. Bhagara rice

- Select Checkbox Use First value as default Value
- Click on Next > Next > Save and new.

.

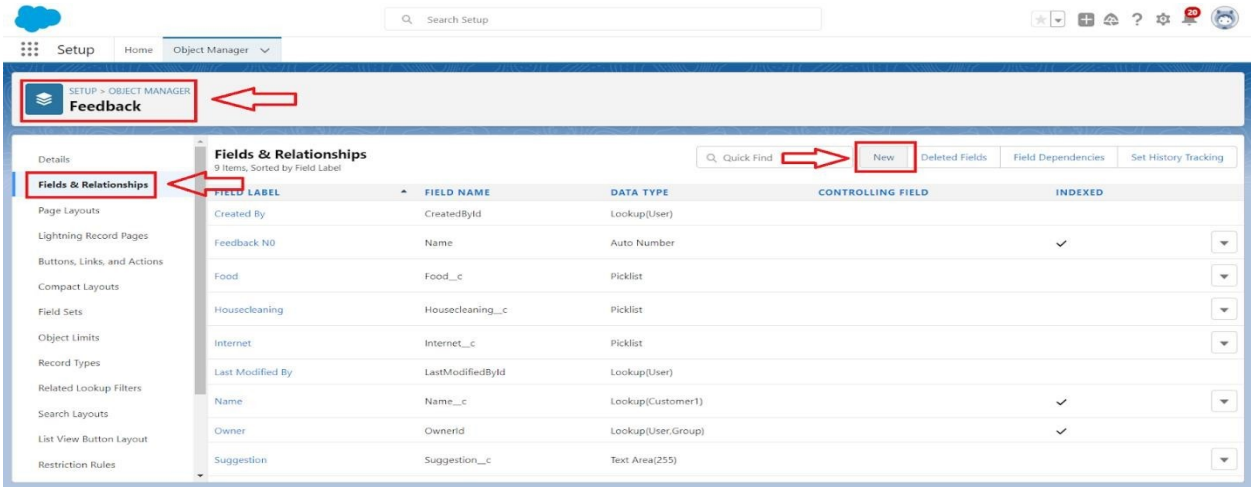
To create a Field dependencies for Dinner and Select Dinner.

1. Go to setup > click on ObjectManager > type object name(FoodSelection) in the search bar
   > click on the object.
2. Now Click on fields & relationships and Click on Field Dependencies
3. Now Click on New Option
4. Under Controlling 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 click on save.

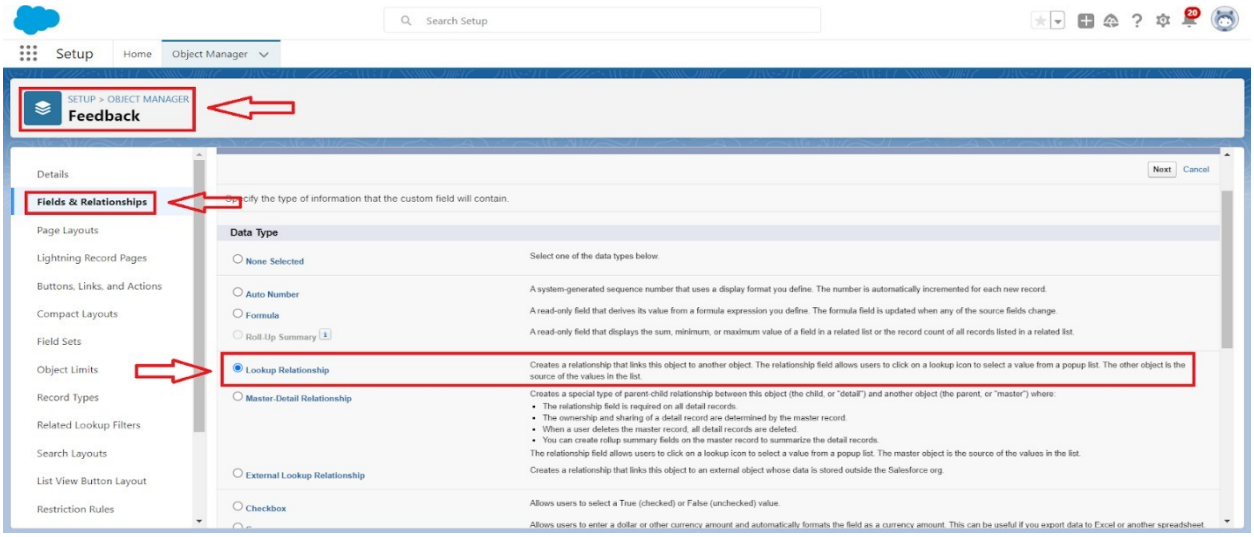
Creation of fields for the Feedback object

1. create fields & relationship to an object:

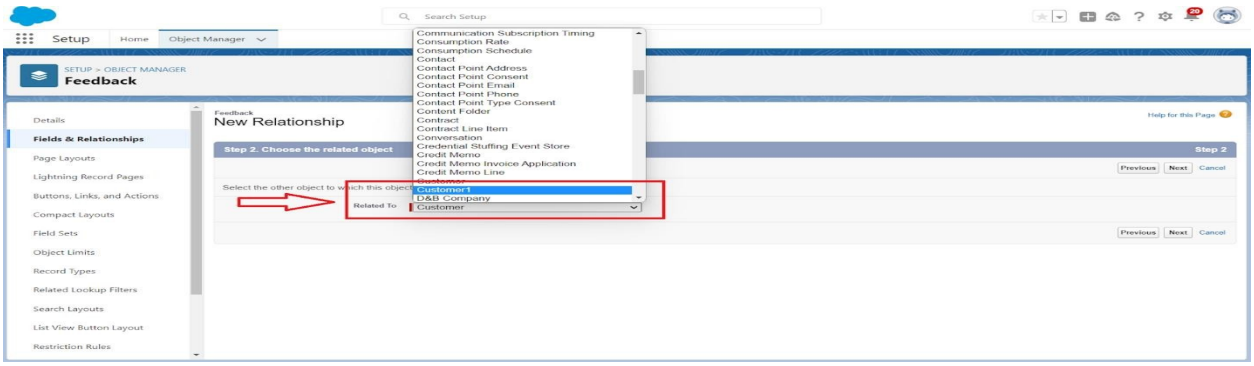
1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on theobject.
2. Now click on “Fields & Relationships” > New



Select Data Type as a “LookupRelationship”
Click on Next

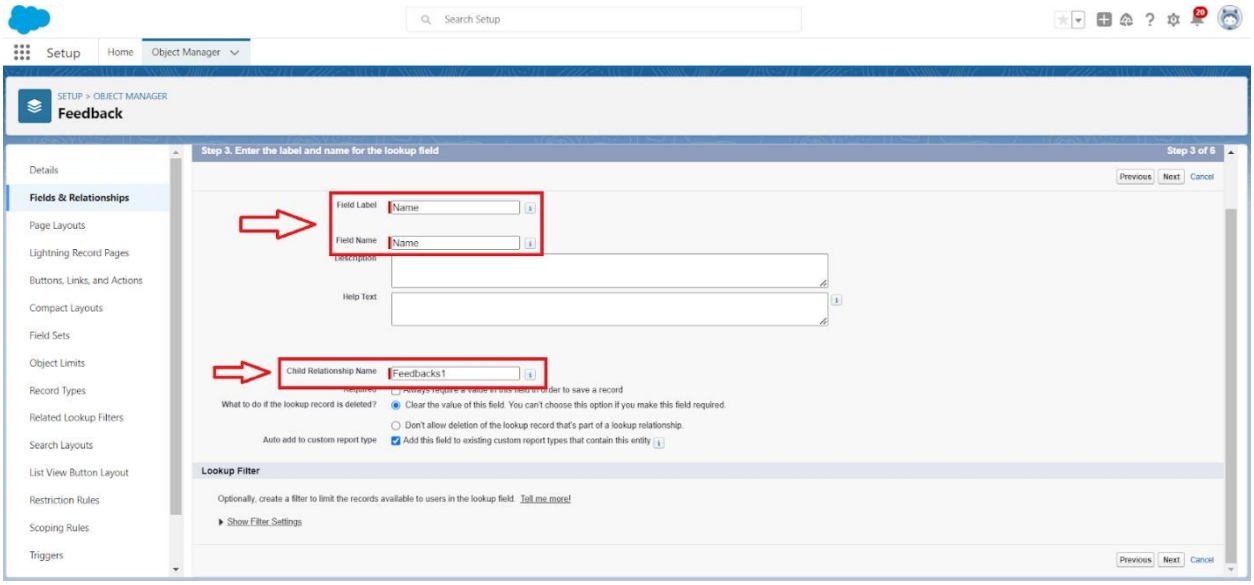


Click on the Related to drop down and Select the Customer1 objectand click on Next



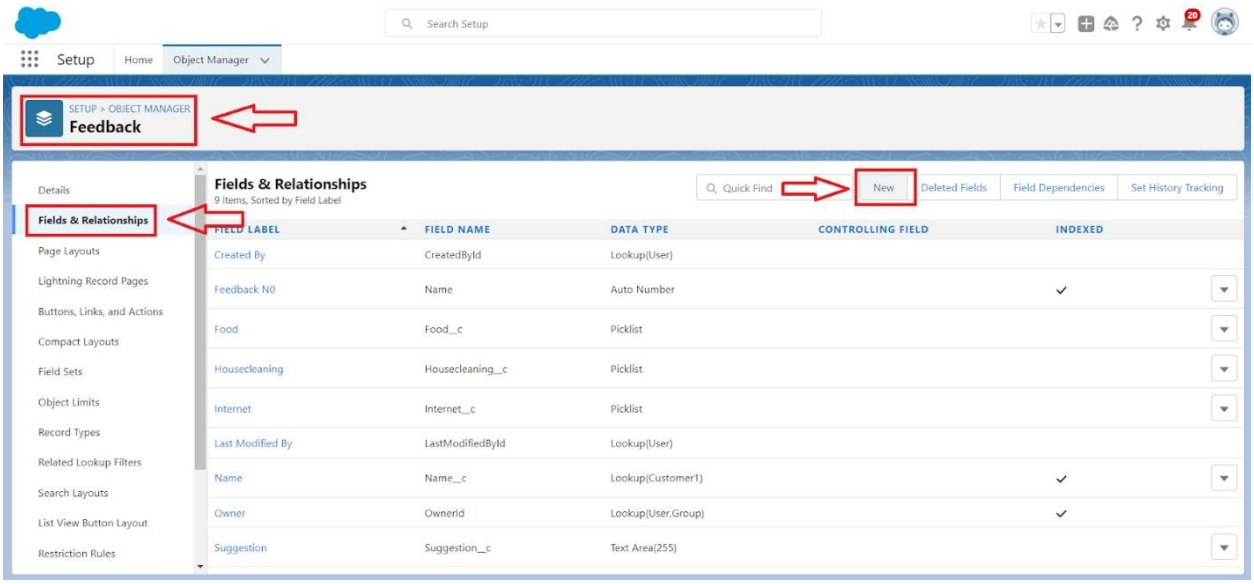
Fill the Above as following:

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



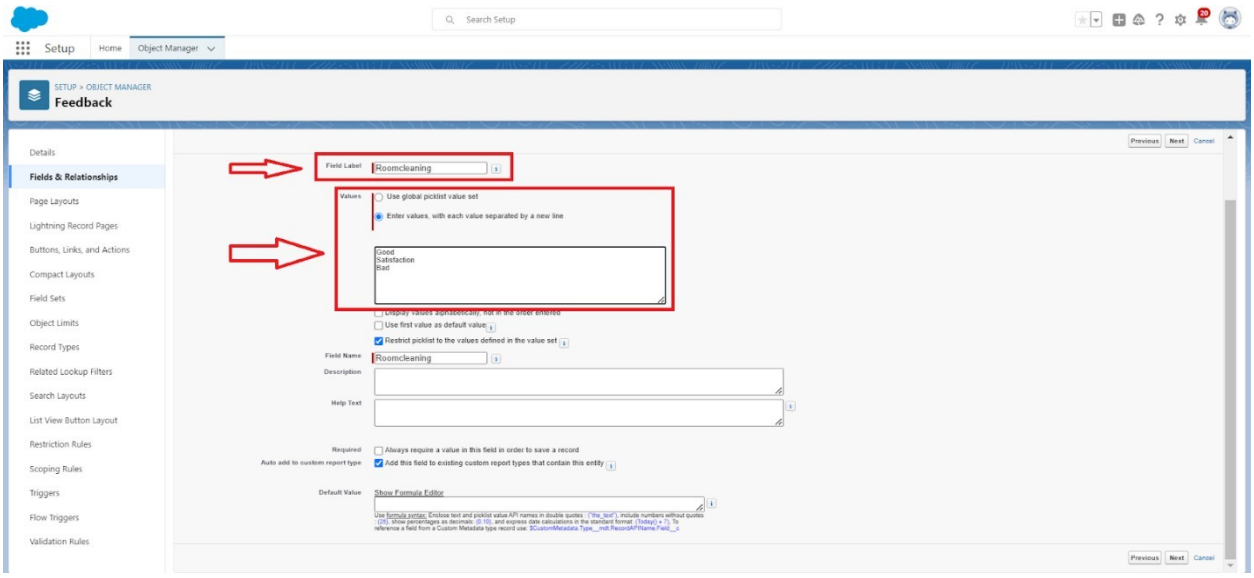
To create Another fields in an Same object:

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



Select Data Type as a “Picklist”

Click on Next



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 Another Fields 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: Internet
- Field Name :It's gets auto generated
- Under Valuesselect 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 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 theobject.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “Text area”
4. Clickon Next

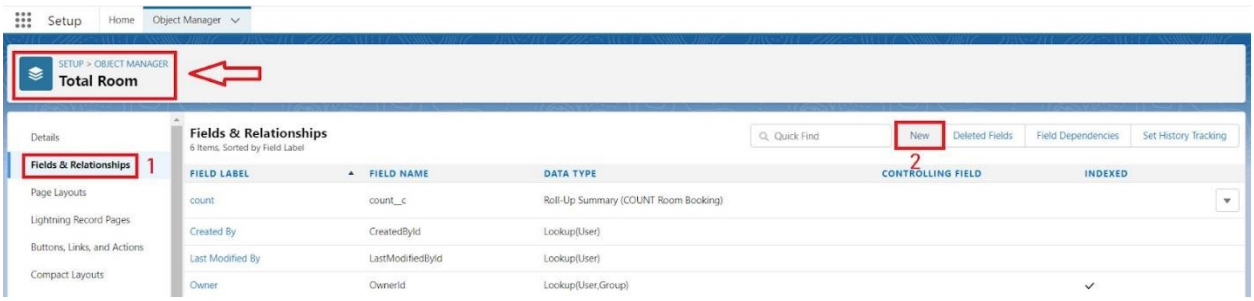
Fill theAbove as following:

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

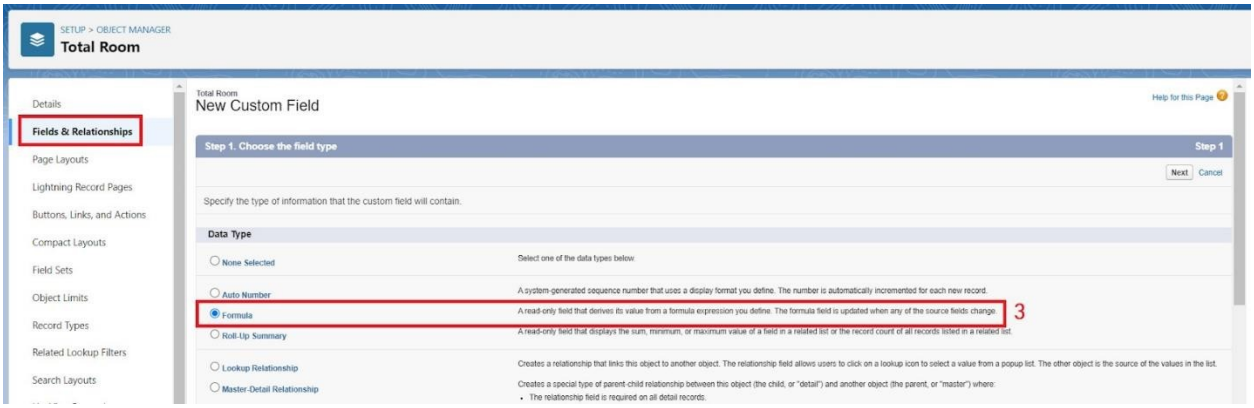
Creation of fields for the Total Rooms object

1. To create fields in an object:

1. Go to setup> click on Object Manager> type objectname(Total Rooms) in search bar > click on theobject.
2. Now click on “Fields& Relationships” > New

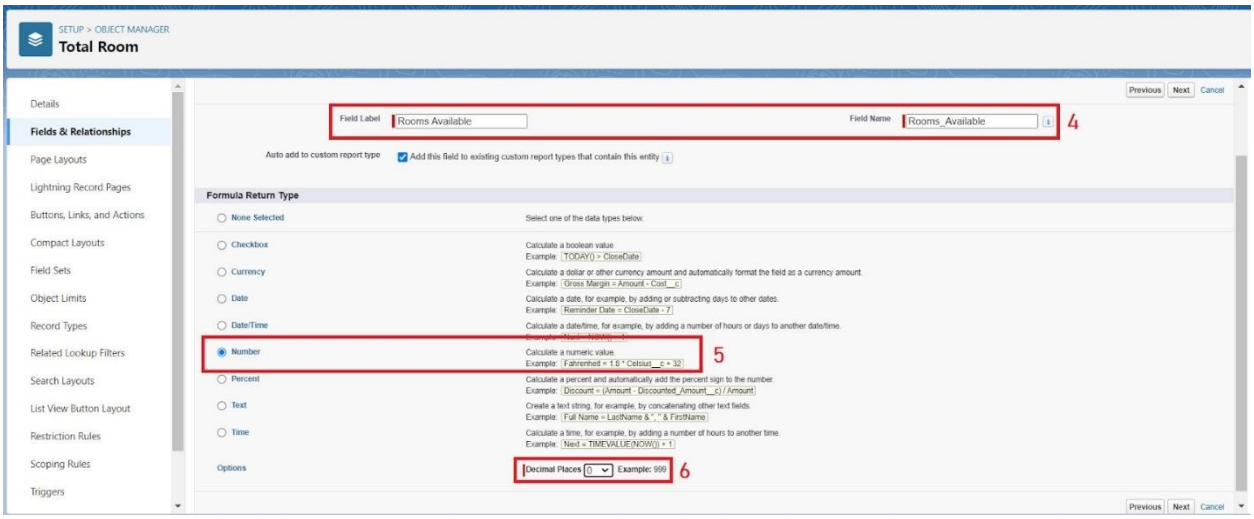


Select Data type as a “Formula”and Click on Next



Fill theAbove as following:

1. Field Label: RoomsAvailable
2. Field Name : It’s gets auto generated
3. Select the Formula ReturnType as “Number”
4. Select the Decimal placesas “0” and Click on Next



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

1. Click on the Advanced Formula “ 30 - Rooms_Booked__c ” and Check Syntax
2. Click on Next > Next > Save and new.

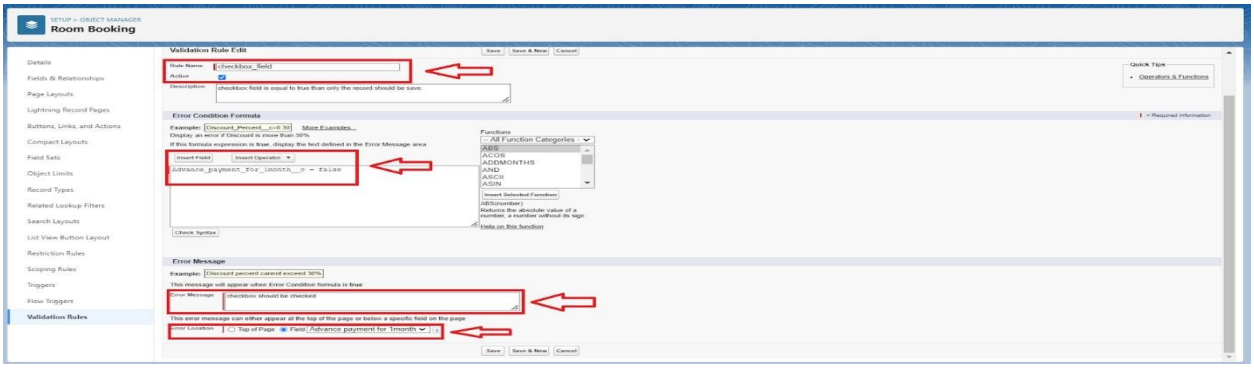
Validation rule

Validation rules are applied when a user tries to save a record and are used to check if the data meetsspecified criteria. If the criteriaare not met, the validation rule triggers an error messageand preventsthe 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 beActive.
4. Enter the formula in the formula Box “Advance_payment_for_1month_c = false” and check forsyntax error.
5. Enter the error message“Checkbox should be checked”

Select error location as field(Advance paymentfor 1month)



Click on save.

create Another 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 “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)

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.

2. **Custom Profiles:**

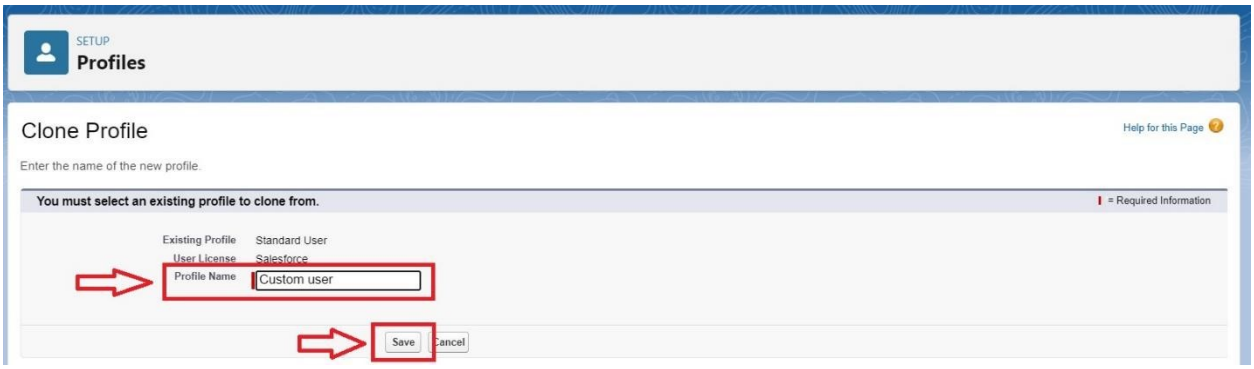
Custom ones defined by us.

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

Customuser Profile

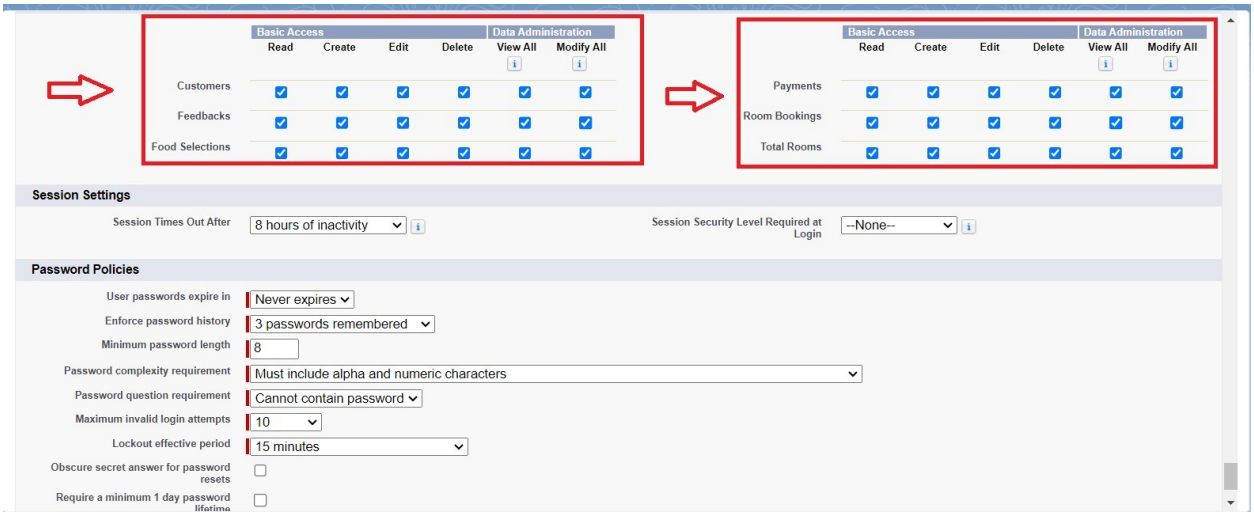
To create a new profile:

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.



While still on the profile page, then clickEdit.

Scroll down to Custom Object Permissions and Give All access permissions for Customers,Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.



Scroll down and Click on Save.

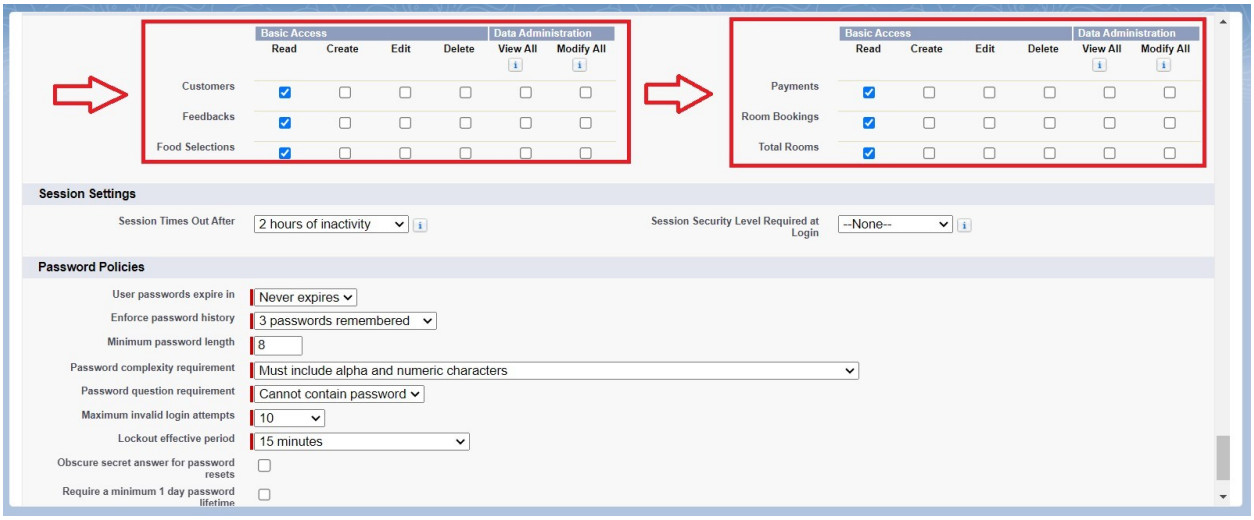
Custom platform user1

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 platform User1) > Save.

3. While still on the profile page, then click Edit.

Scroll down to Custom Object Permissions and Give only Read access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms



Scroll down and Click on Save.

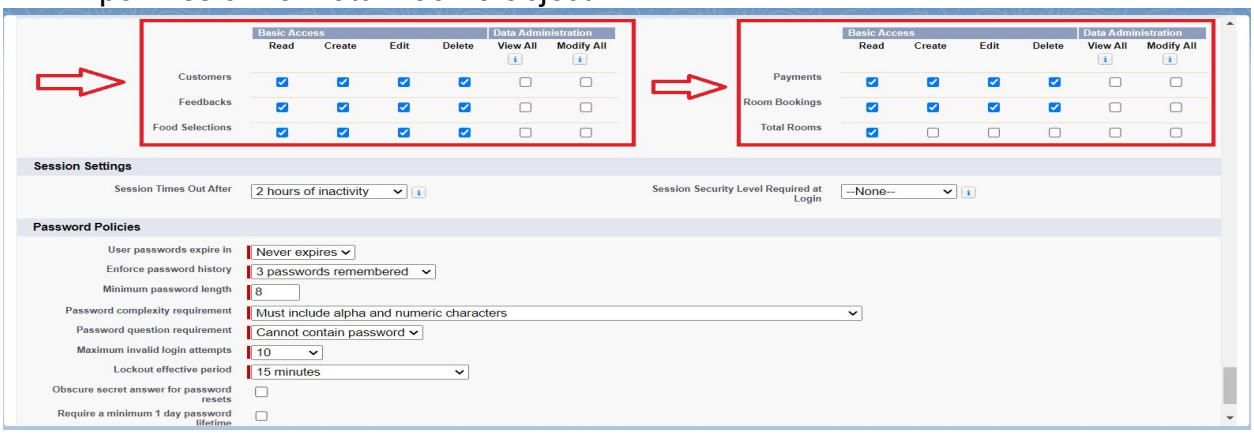
Custom platform user2

To create 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 profile page, 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. AndRead Access permission for Total Rooms Object.



Roles

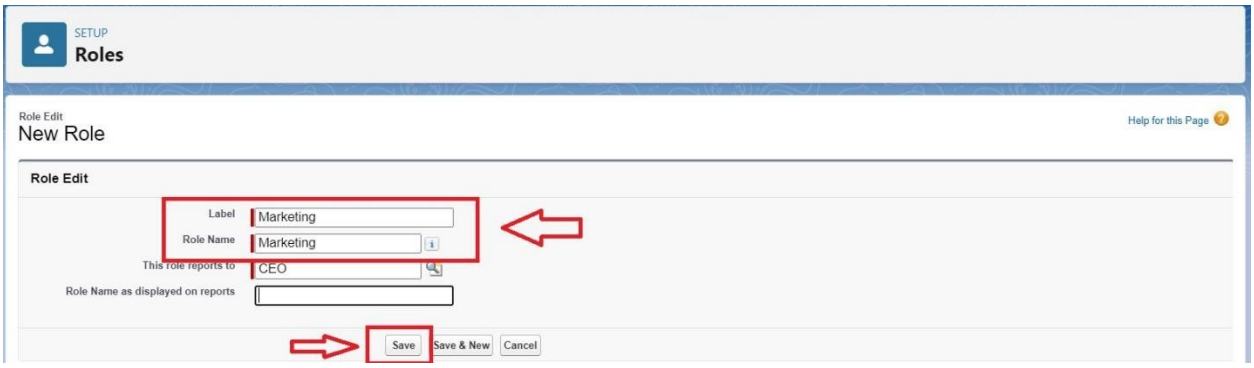
A role in Salesforce defines a user'svisibility access at the recordlevel. Roles may be used to specifythe types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Marketing Role

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

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

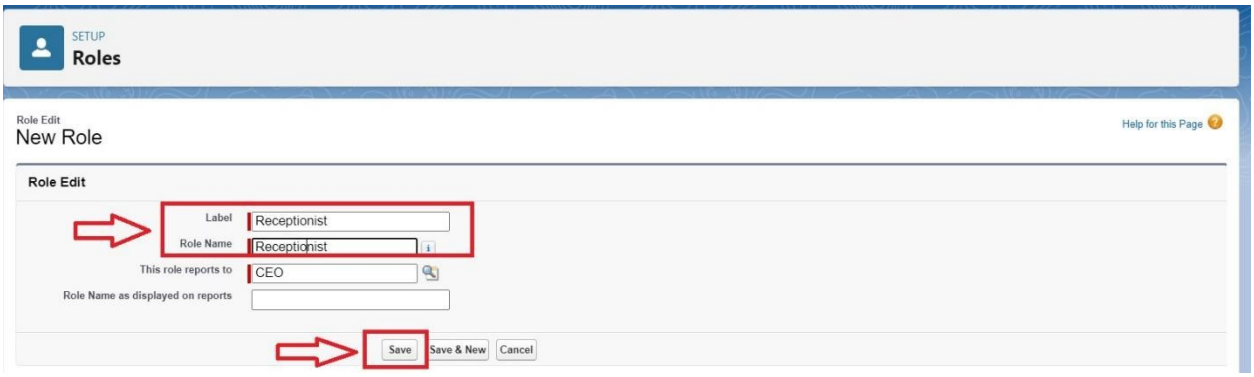
Give Label as “Marketing” and Role name gets auto populated.



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.



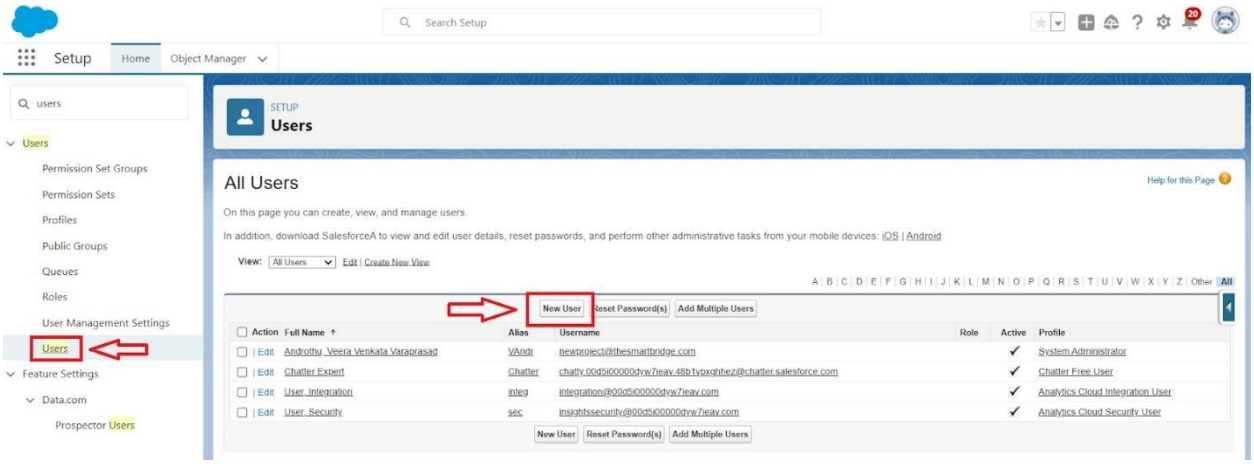
Then click on Save.

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

Go to setup > type users in quickfind box > select users> click New user.



Fill in the fields

a. First Name : sandeep

b. Last Name : gujja

c. Alias : Give a Alias Name

d. Email id : Giveyour Personal Email id

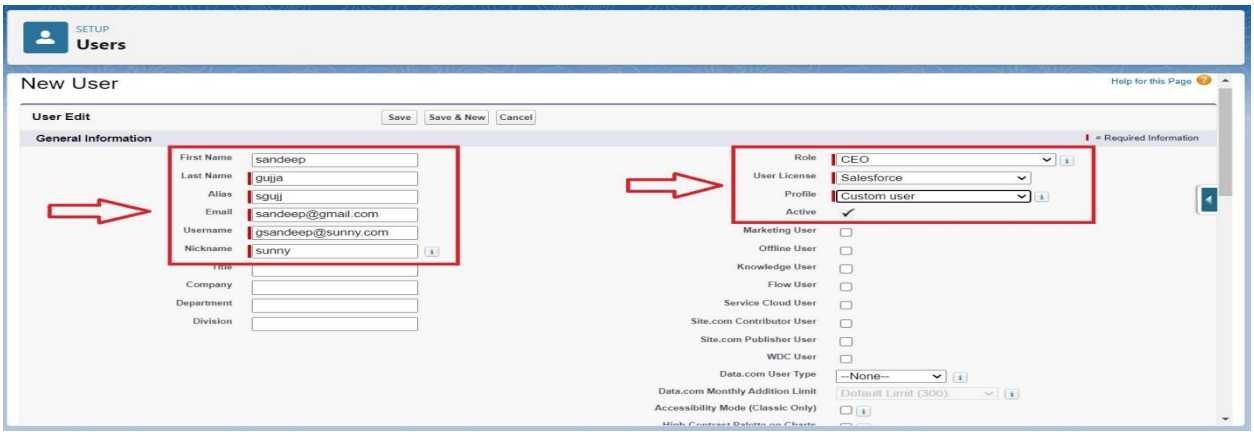
e. Username : Username should be in this form: text@text.com

f. Nick Name : Give a Nickname

g. Role : CEO

h. User licence : Salesforce

i. Profiles : Customuser



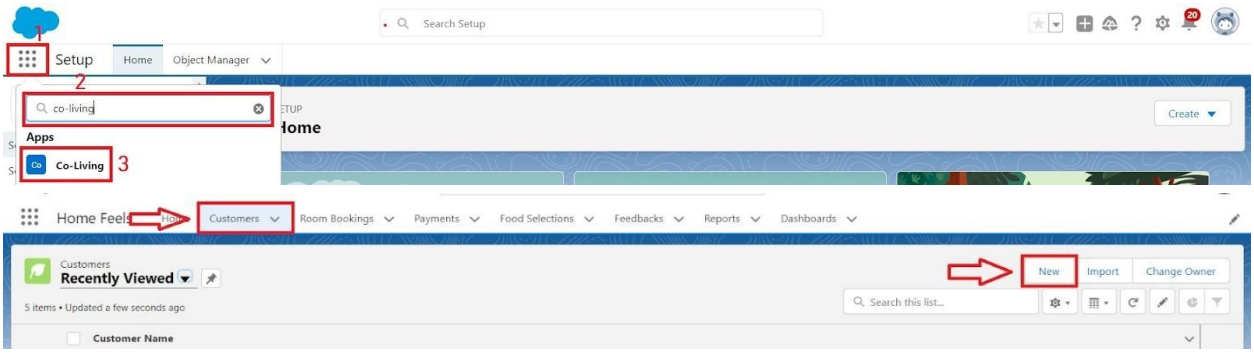
Save

User Adoption

Create a Record (Customers)

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

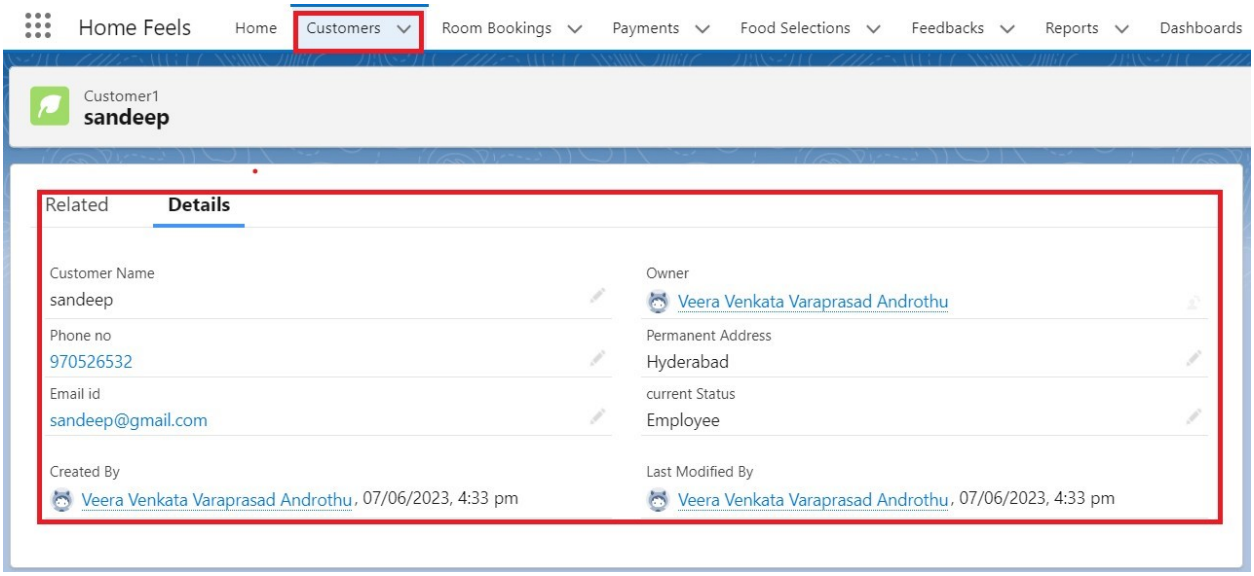
Search Home Feels & click on it.



Record

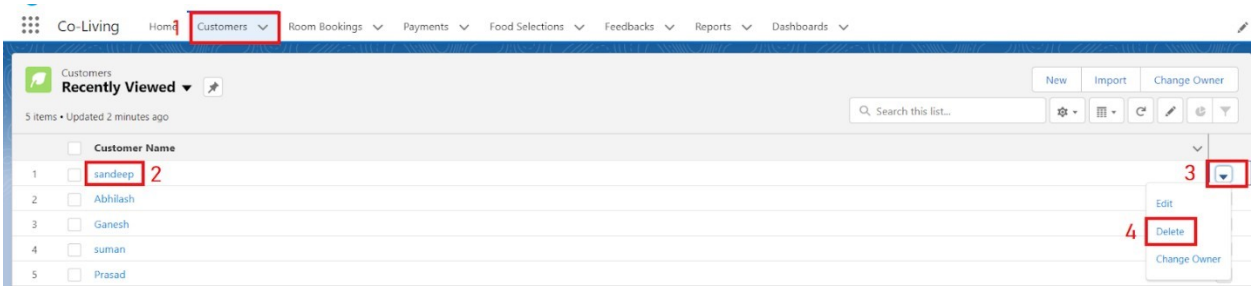
(customers)

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.



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.

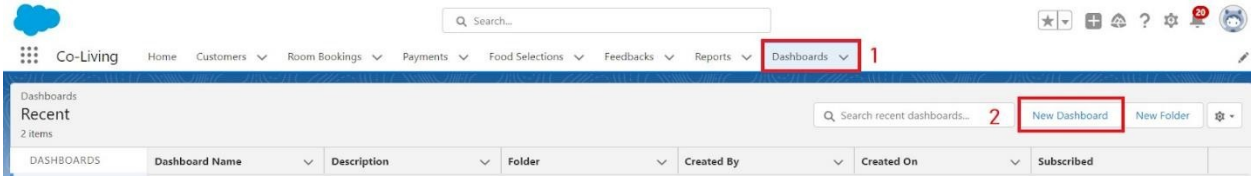


Dashboards

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

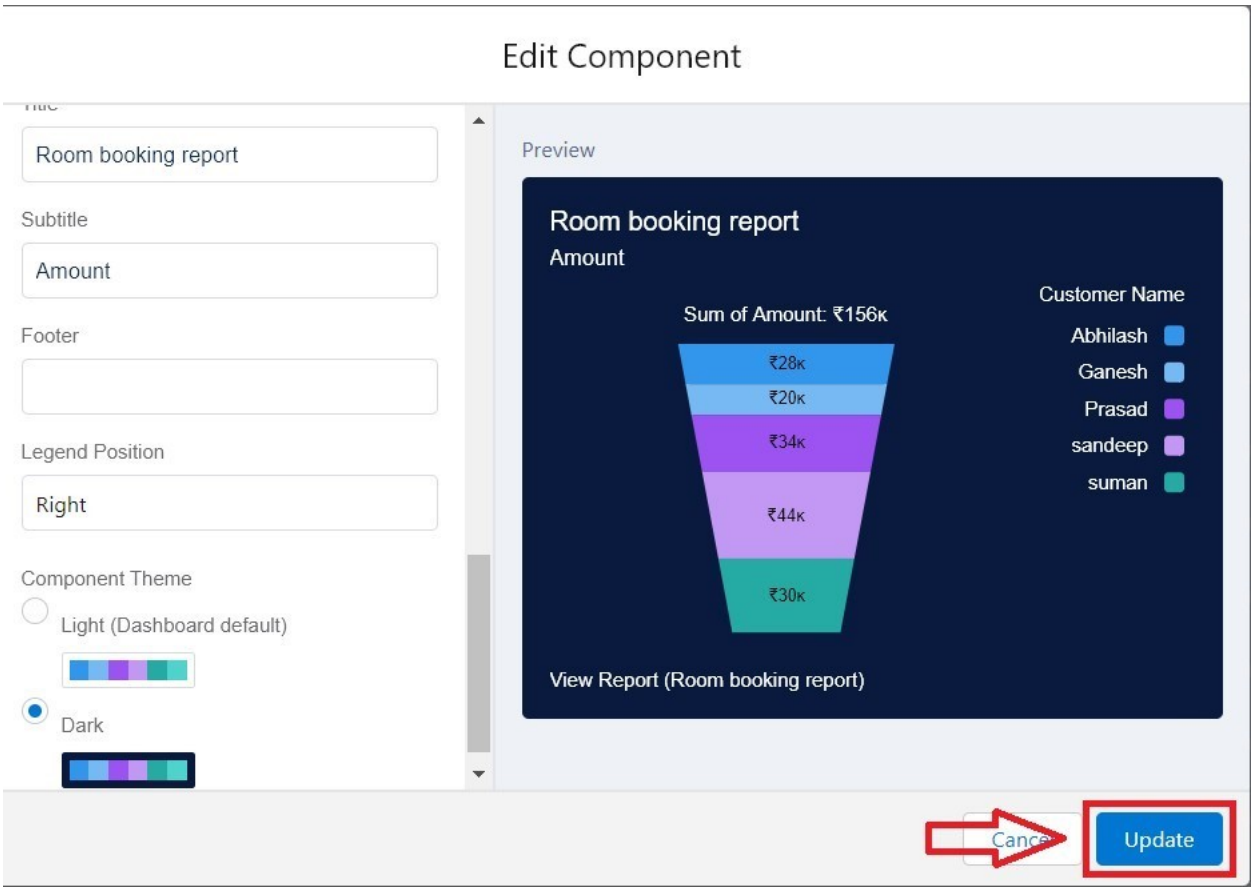
1. Go to the app > click on the Dashboardtabs and click on new Dashboard



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

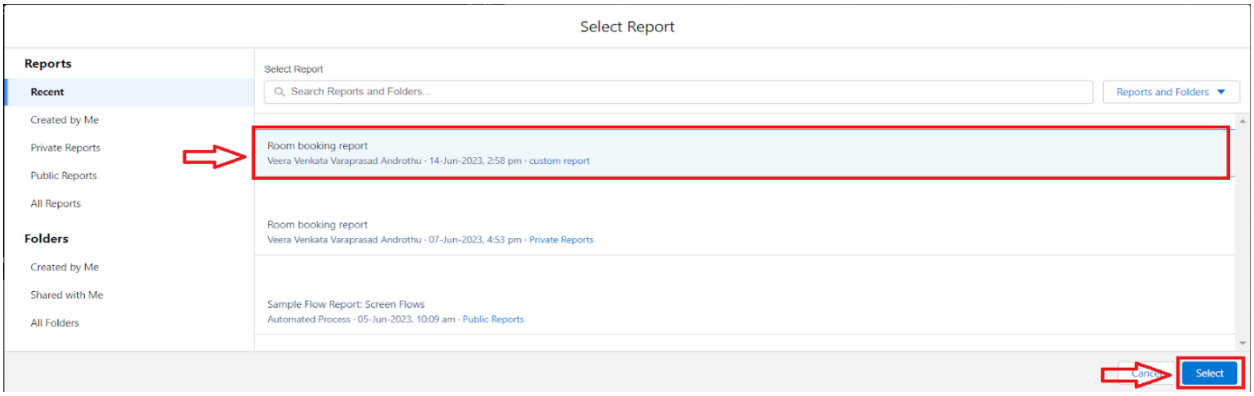
Create Another Dashboard

1. Go to the app > click on the Dashboardtabs and click on new Dashboard.
2. Give a Name and clickon Create.
3. Select add component.
4. Select a ReportCustomer with Room Booking with Payments and click on select.
5. Click Add then click on Save and then click on Done.



Select add component.

Select a ReportCustomer with Room Booking and click on select.



Flows

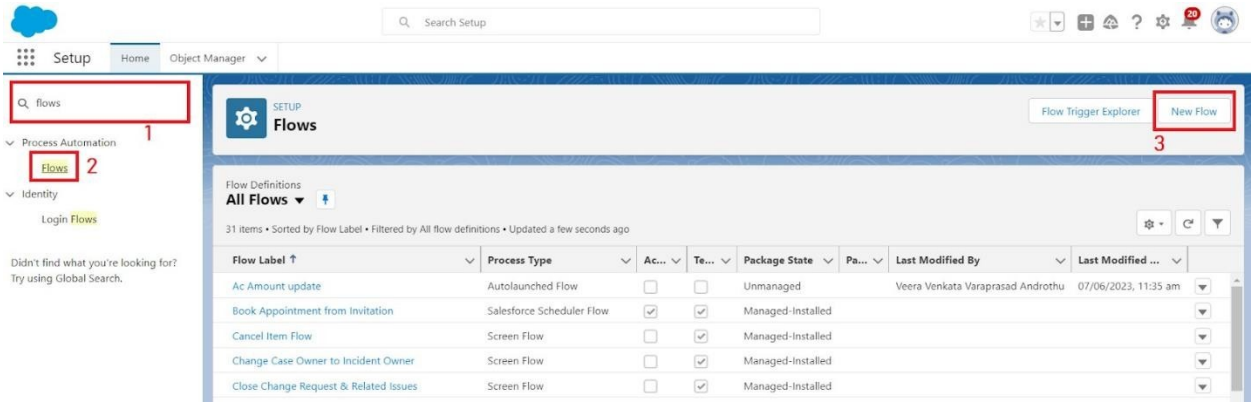
In Salesforce, a flow is a powerfultool that allowsyou to automate business processes, collect and updatedata, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Why do we need to create a flow:

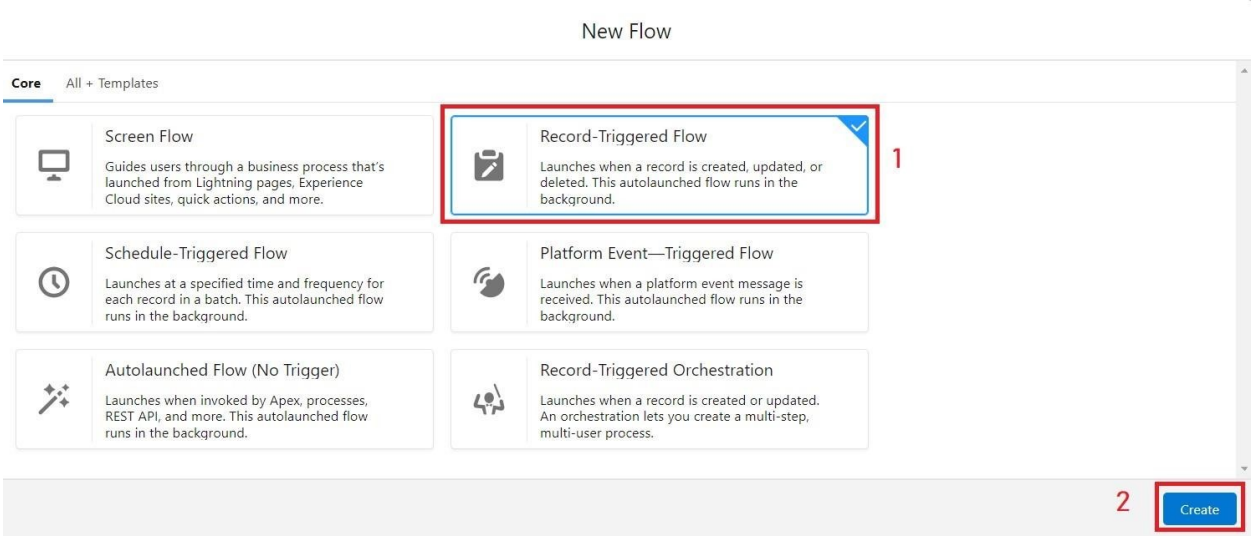
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

Create a Flow

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



Select the Record-triggered flow and Click on Create.



Select the Object as a Room Booking in the Drop down list. 4.Select the Trigger Flow when: “A record is Created or Updated”.

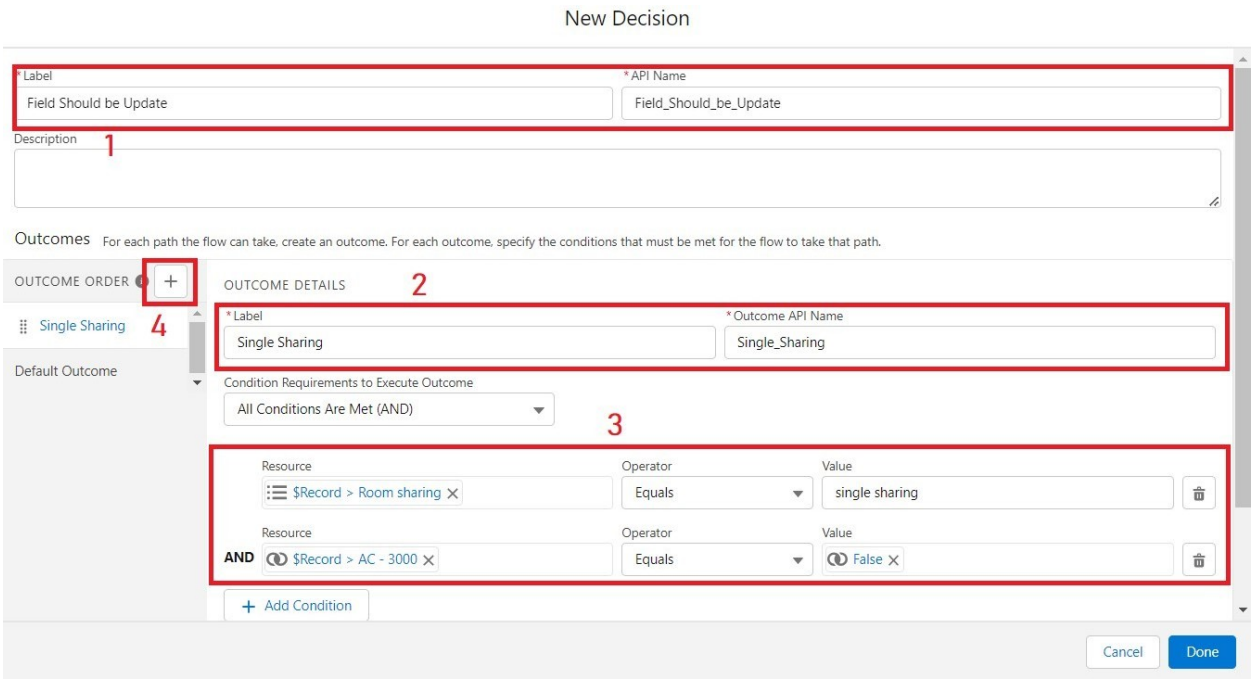
1. Select the Optimize the flow for: “Actions and Related Records”and Click on Done.

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.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Singlesharing.
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select False.
- Click on “+” Symbol In the OutcomeOrder.



1. Enter the OutcomeDetails Label: Double sharing, OutcomeAPI 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 False.
h. Click on “+” Symbol In the OutcomeOrder.

2. Enter the Outcome Details Label: Triple sharing,Outcome API name: Gets AutomaticallyGenerated.

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 False.
h. Click on “+” Symbol In the OutcomeOrder.

3. Enter the Outcome Details Label: Single Ac, OutcomeAPI 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 True.

h. Click on “+” Symbol In the OutcomeOrder.

4. 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 “+” Symbol In the OutcomeOrder.

5. 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.

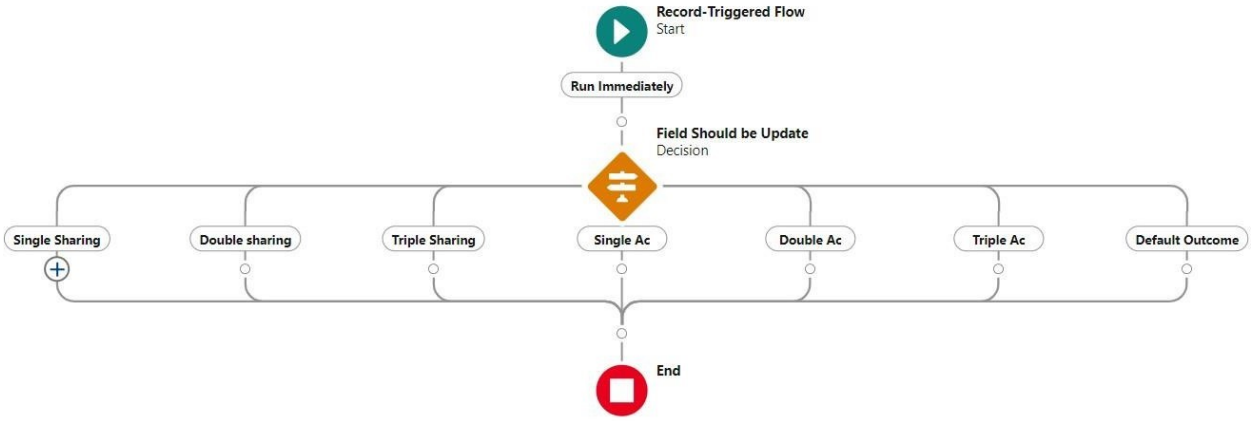
    d. Click on “Add Condition”

    e. Resource: Select Record.AC-3000.

    f. Operator: Select Equals.

g. Value: Select True.

h. Click on Done.



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

2. 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.

3. 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.

4. 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.

5. Enter the update records details

    a. Label: Single ac1.

    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.

6. Enter the update records details

    a. Label: Double ac1.

    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.

7. Enter the update records details

a. Label: Triple ac1.

b. API name: Gets automatically Generated.

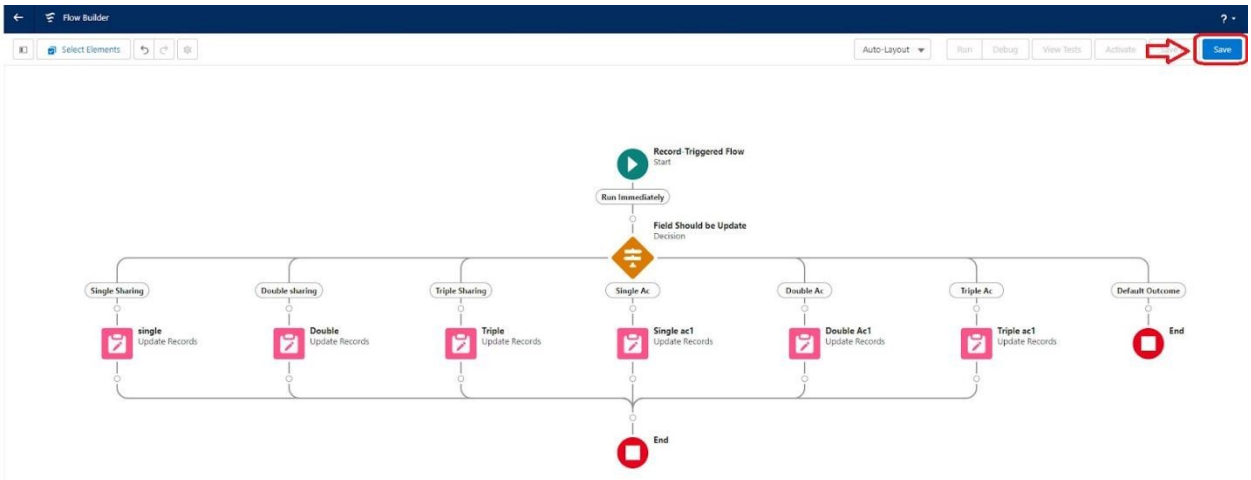
c. Under the Set Field Values for the Room BookingRecord.

d. Field: Amount.

e. Value: 26000.

f. Click on Done.

8. The Flow will Form like This andClick on save.



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 customerdetails, enabling residents to easilychoose from differentair-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 conveniencefor residents.
- Moreover, the feedbackfeature will empowerresidents to provideinsights into the quality of services,suchas room cleaning, internet connectivity, and food services, which will help maintain and improveservice standards. Overall, this CRM system will not only foster a seamless living experience but alsoreinforce 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.