A CRM Application to Manage the Booking of Co-L-Living

Abstract:

Our co-living space project fosters an inclusive community where individuals can live, work, and connect. The space offers a balance of private and communal areas, encouraging collaboration and reducing isolation. The application allows users to select AC rooms with multiple sharing options, choose daily special food items, make payments through various modes, and provide feedback on services like room cleaning, internet connection, and food.

Features and Functionality:

1.Customer Management

I. Customer Registration: Users can register themselves by providing personal details such as name, email, phone number, and address.

II. Customer Profile: A user profile will be created to store customer information, booking history, and payment details.

2.Room Booking

I. **Room Selection:** Users can browse and select from different AC rooms with multiple sharing options (e.g., single, double, triple sharing).

II. **Room Availability:** The application will display the availability of each room type in real-time.

III. Booking: Users can book a room by selecting the desired room type, check in and check-out dates, and number of occupants.

3.Payment Management

I. Payment Options: Users can make payments using various modes such as credit/debit cards, net banking, or wallets.

II. Payment History: A record of all payments made by a user will be stored in their profile.

4.Security and Access Control

I. **User Authentication:** Users will be authenticated using a secure login system.

II. **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.

5.Functionality

I. **Search and Filter:** Users can search for available rooms by date, room type, and sharing options.

II. Booking Confirmation: Once a booking is made, the user will receive a confirmation email with details of their booking.

III. **Payment Reminders:** The application will send reminders to users for pending payments.

IV. Feedback Notifications: The application will send notifications to administrators when a user provides feedback.

V. Reporting and Analytics: The application will generate reports and provide insights on customer behavior and preferences.

6.Reporting and Analytics

I. Booking Reports: The application will generate reports on room bookings, occupancy rates, and revenue.

II. Customer Insights: The application will provide insights on customer behavior, preferences, and feedback.

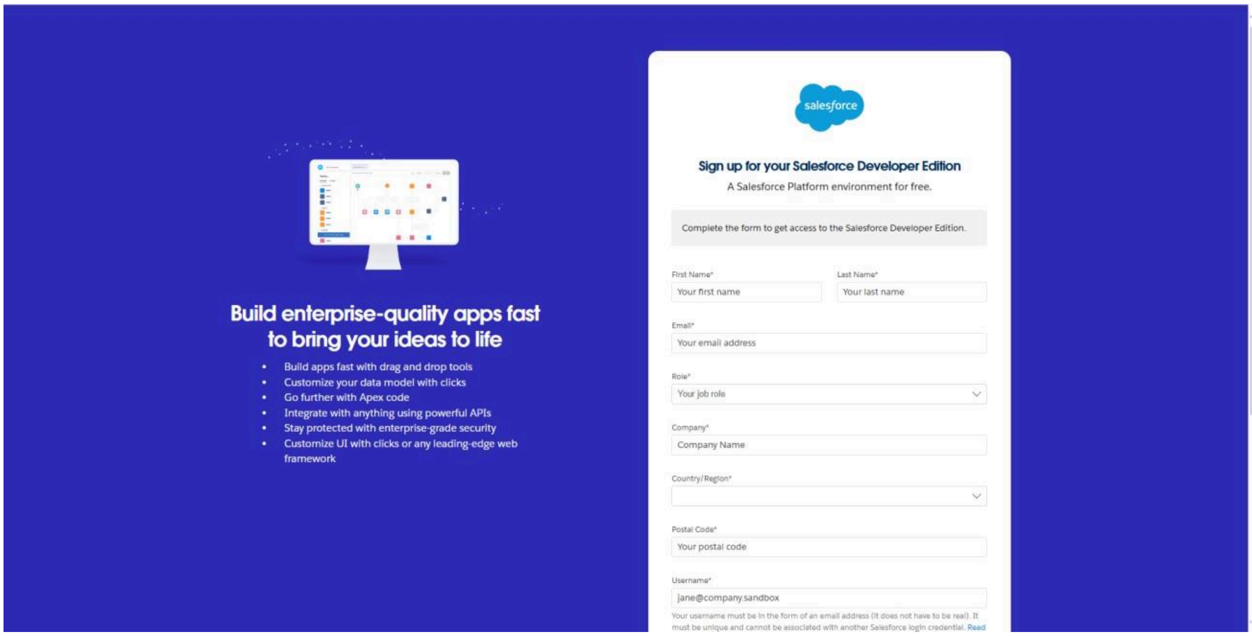
Milestone 1 - Introduction to Salesforce:

What is Salesforce?

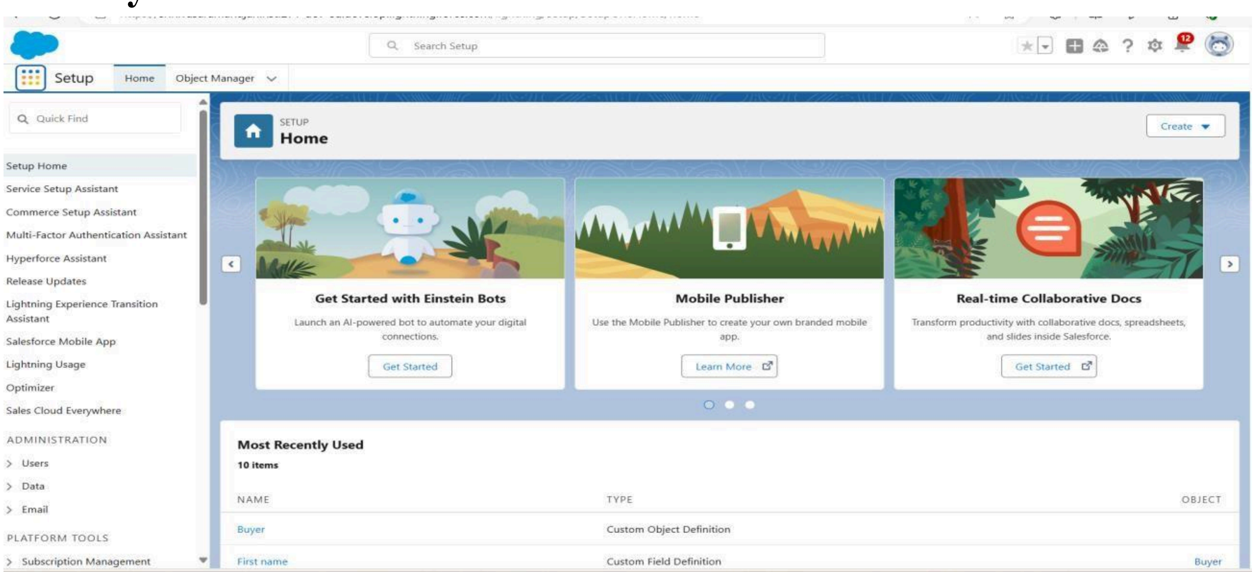
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Activity 1: Creating Developer Account:

https://developer.salesforce.com/signup



Activity 2: Account Activation:



Activate your account by clicking the verify account which you received to your Email id**.**

Milestone 2 – Object

What Is an Object?

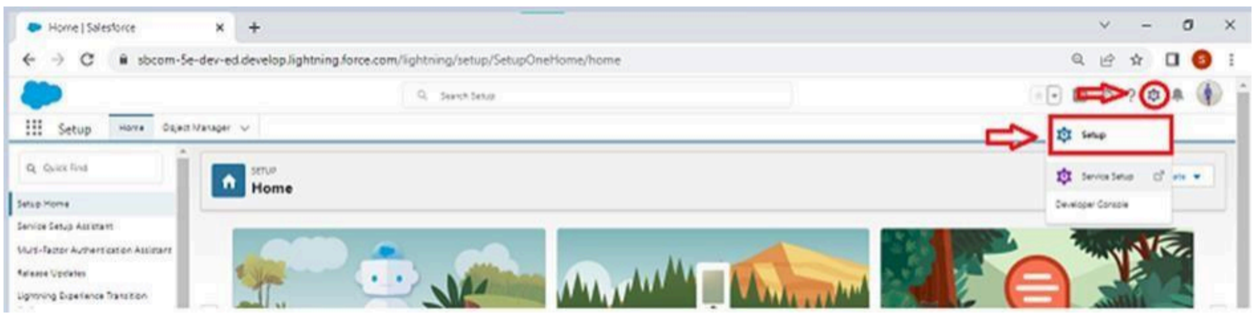
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

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

To Navigate to Setup page:

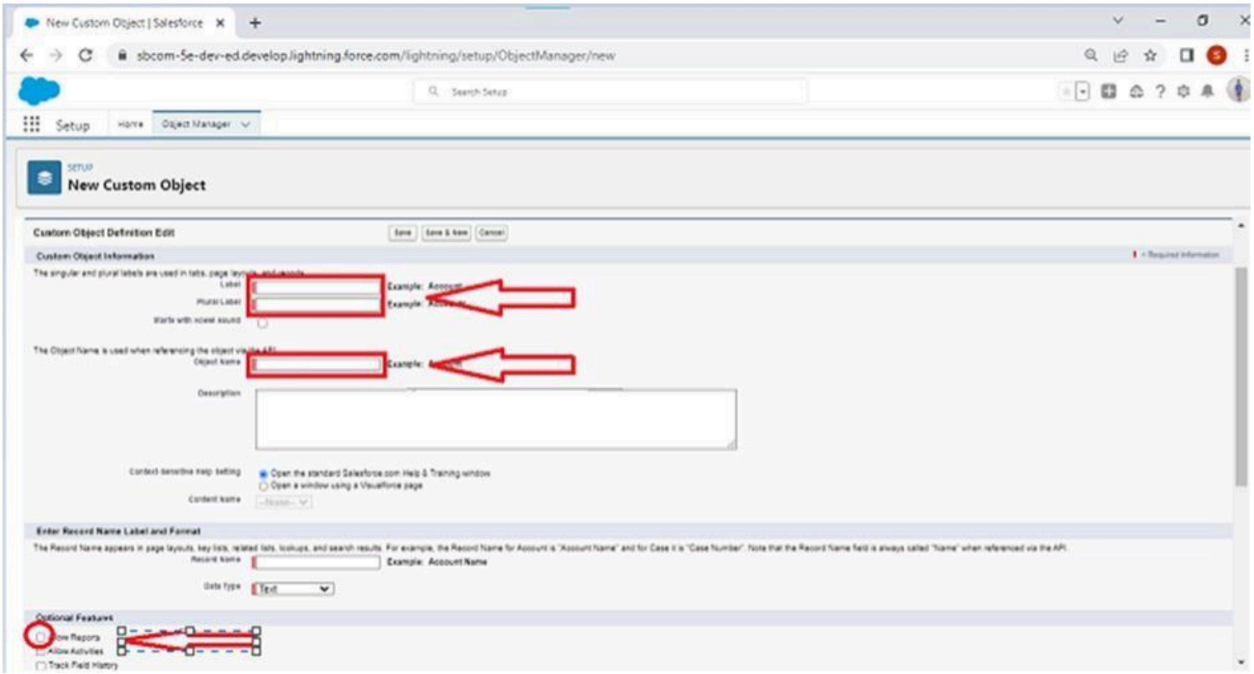
Click on gear icon ? click setup.



To create an object:

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

2. On the Custom object defining page:
3. Enter the label name, 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:

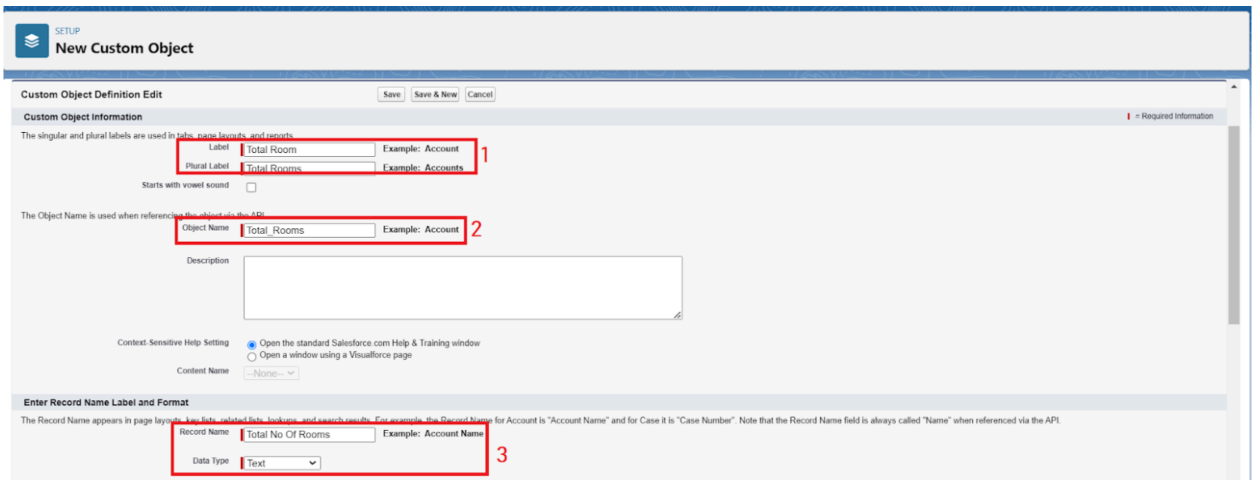
1. From the setup page Click on Object Manager Click on Create Click on Custom Object.

1.Enter the label name Supplier

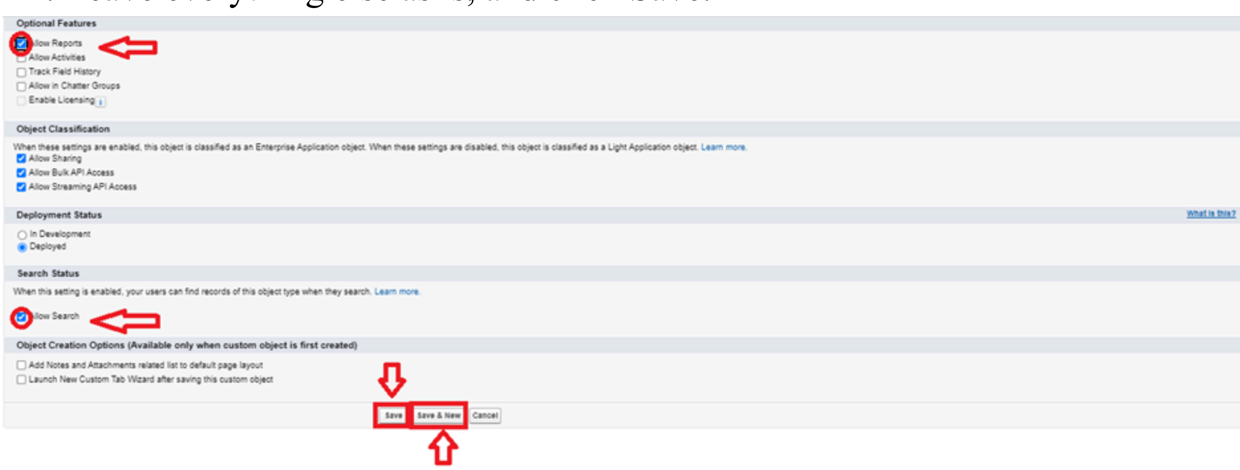
2.Plural label name? Suppliers

3. Fill in the label as " Total Room ".

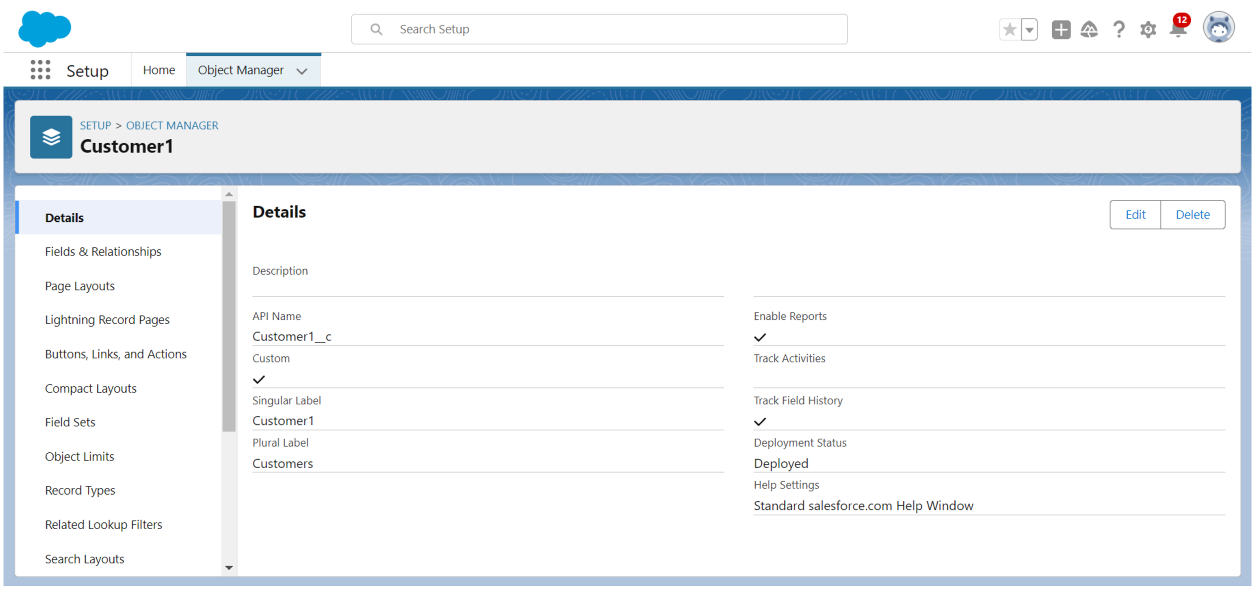
4. Fill in the plural label as " Total Rooms ".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.



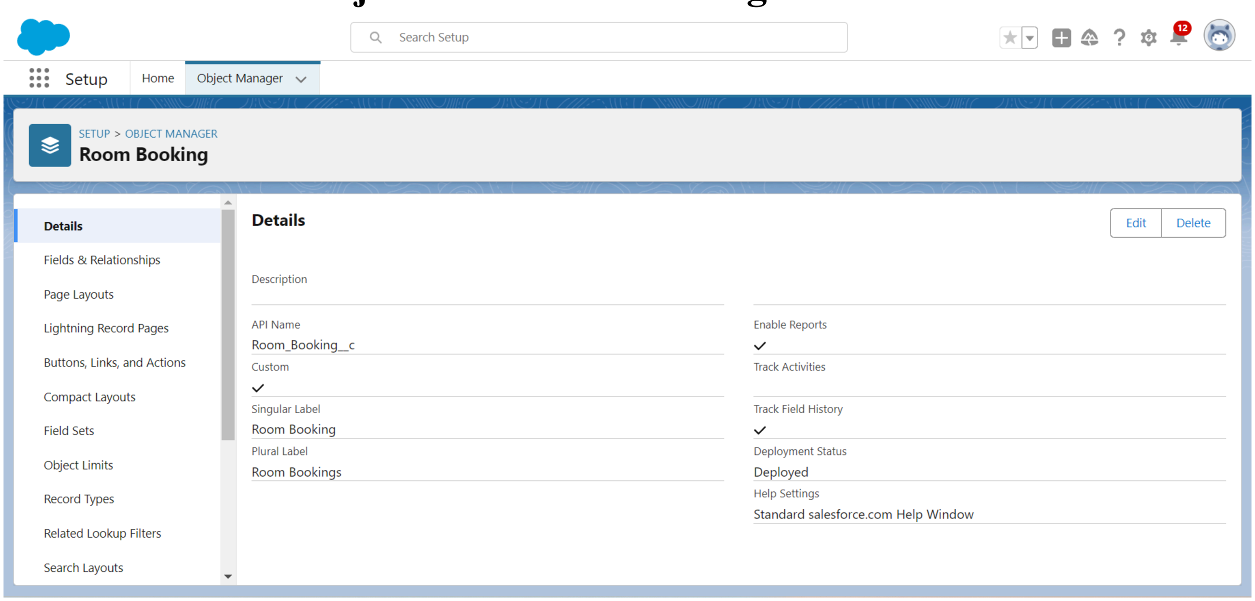
11. Leave everything else as is, and click Save.



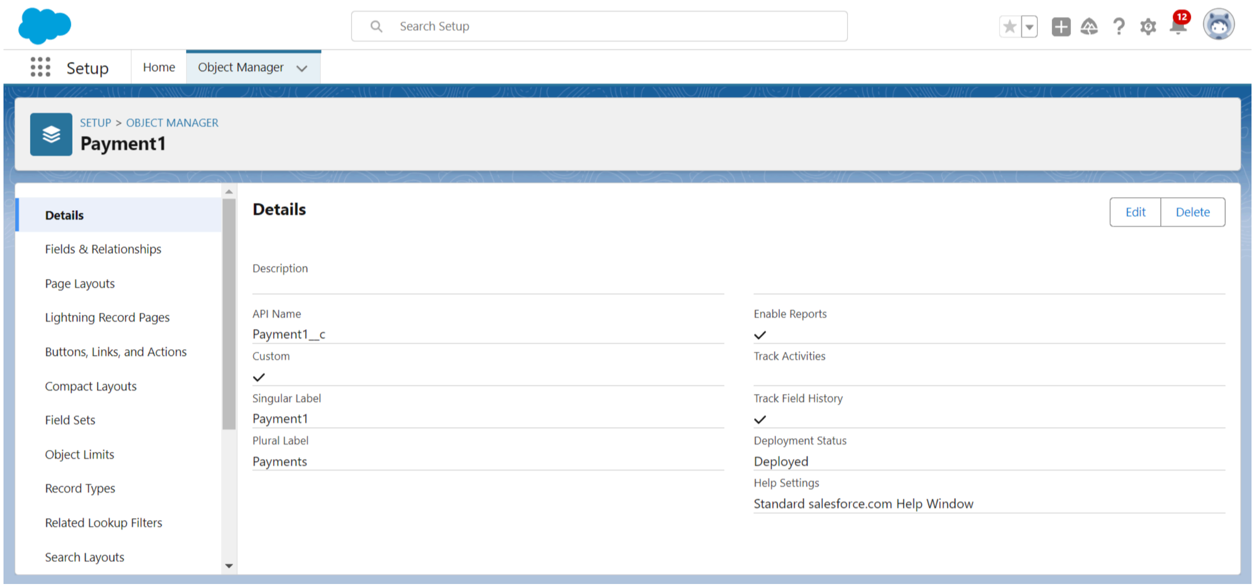
Create a custom object for Customer



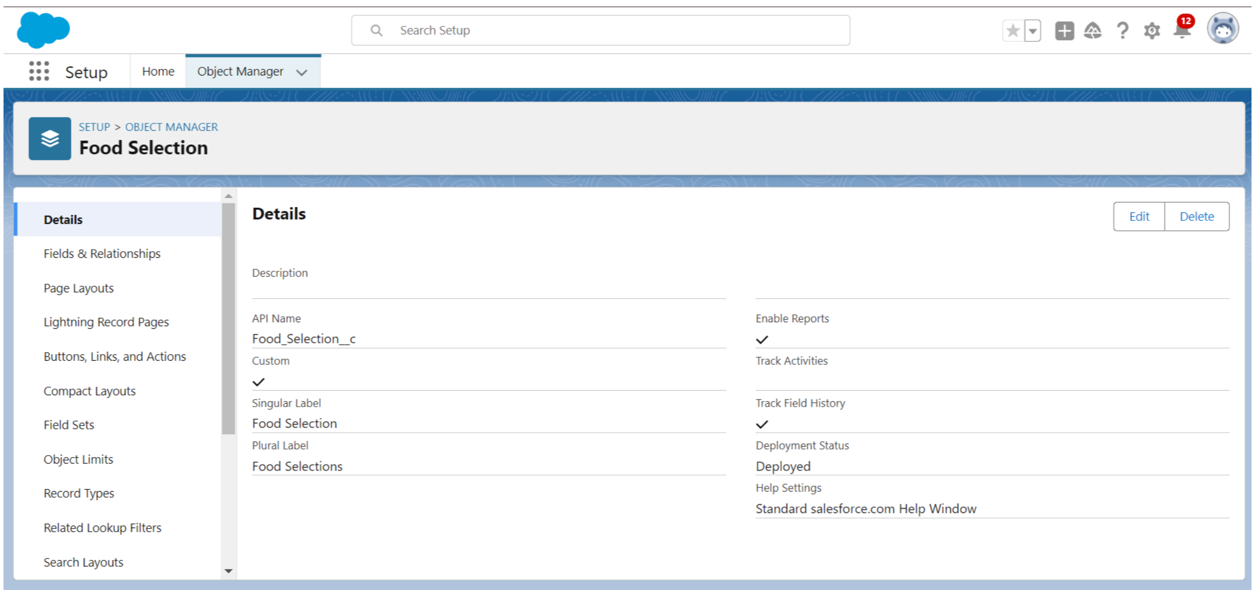
Create a custom object for Room Booking



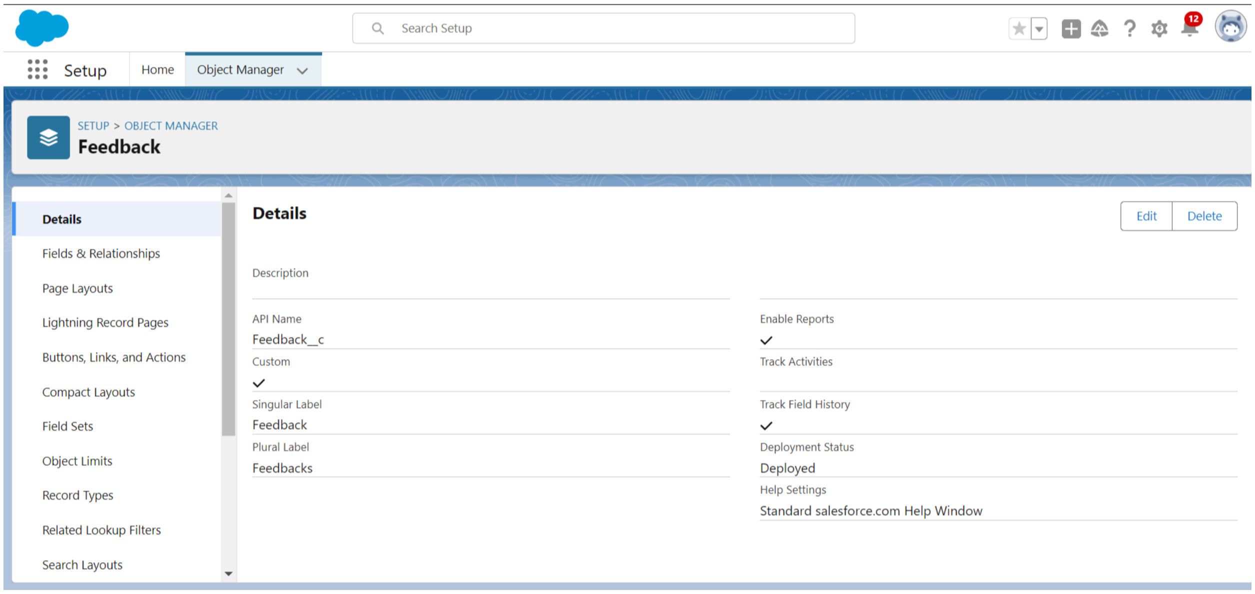
Create a custom object for Payment



Create a custom object for Food Selection



Create a custom object for Feedback



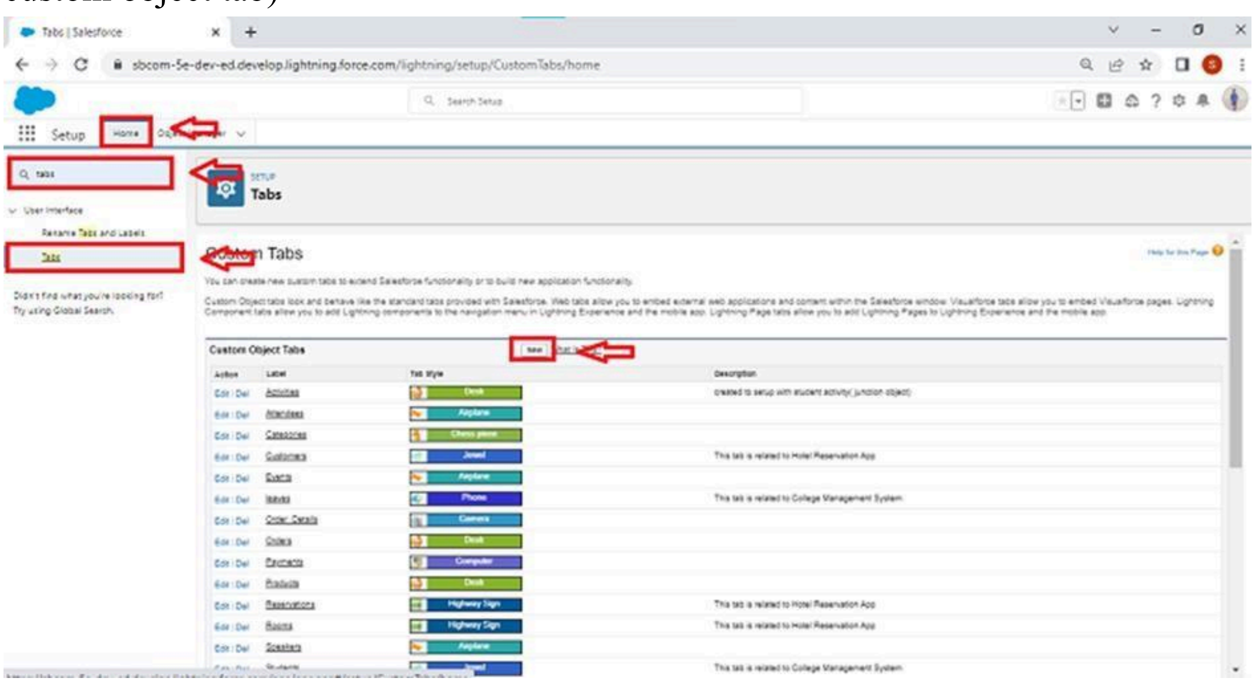
Milestone 3 - Tabs

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.

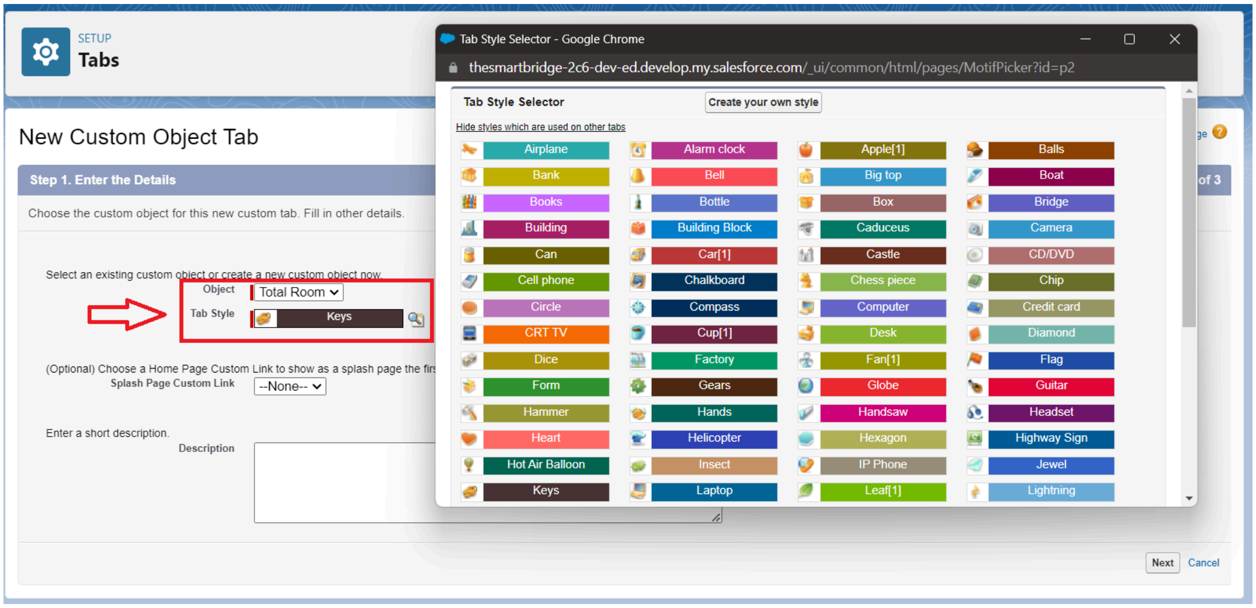
Activity 1: Creating a Tab for Total Rooms

To create a Tab:(Total Rooms)

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



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

Create a Tabs For Remaining Objects

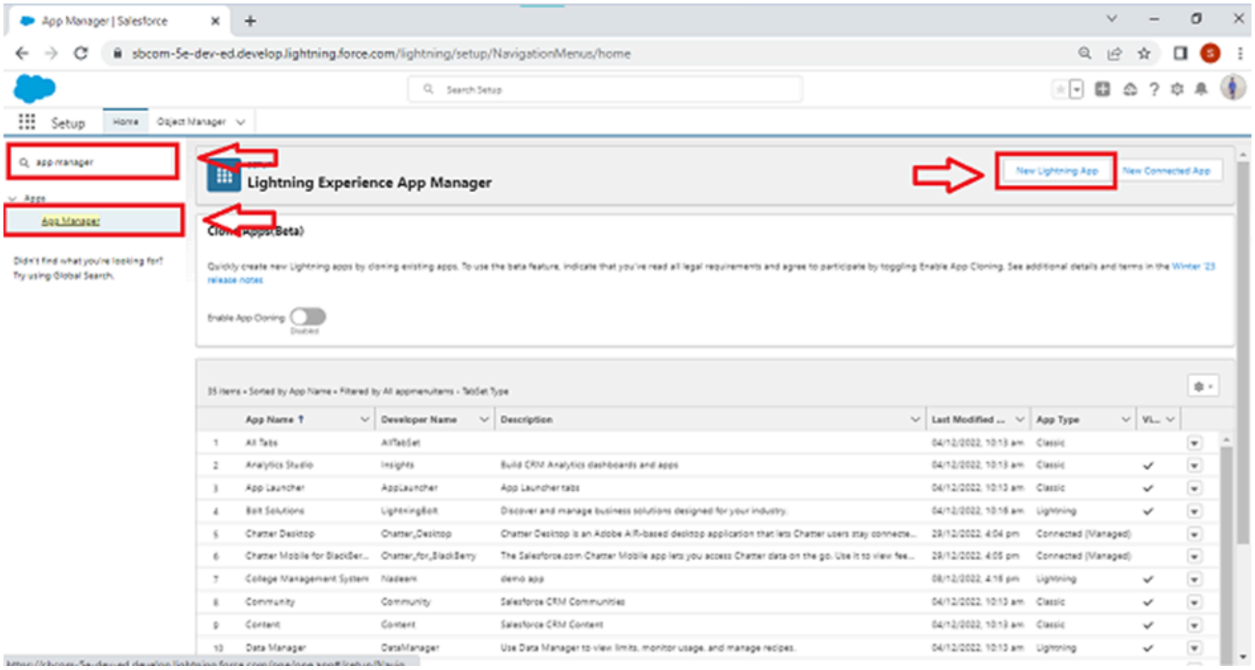
Now create the tabs for Customers, Room Bookings, Payments, Food Selections, Feedbacks Objects

Milestone 4 - The Lightning App

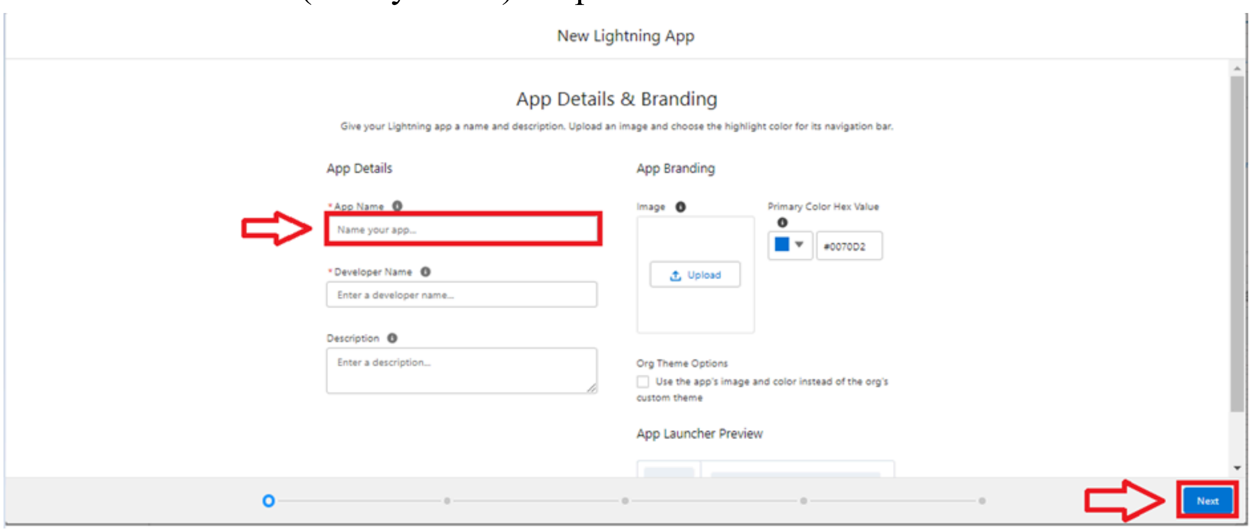
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and 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:

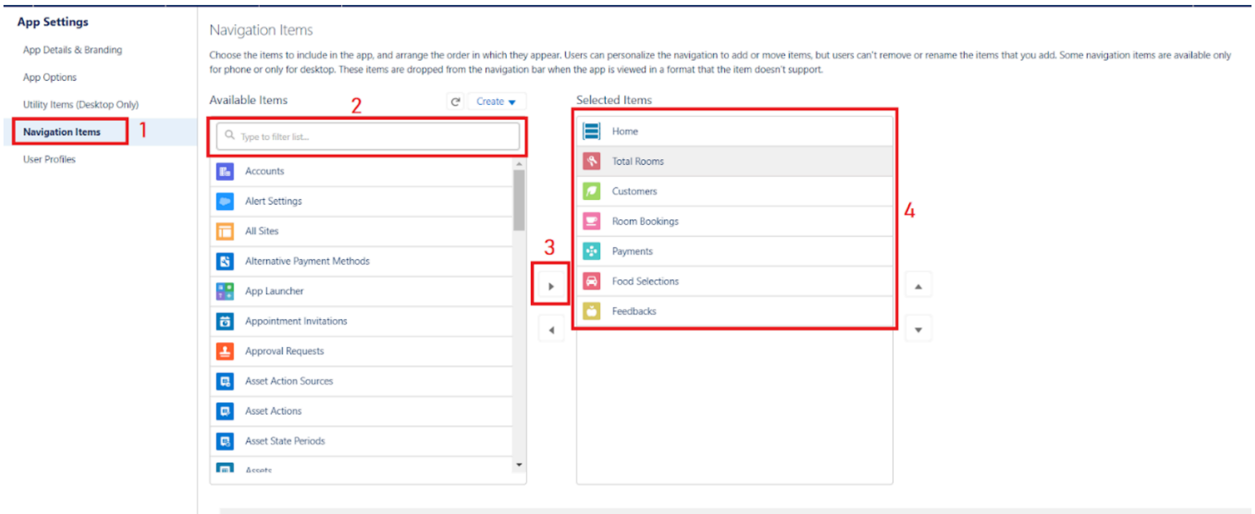
1.Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.



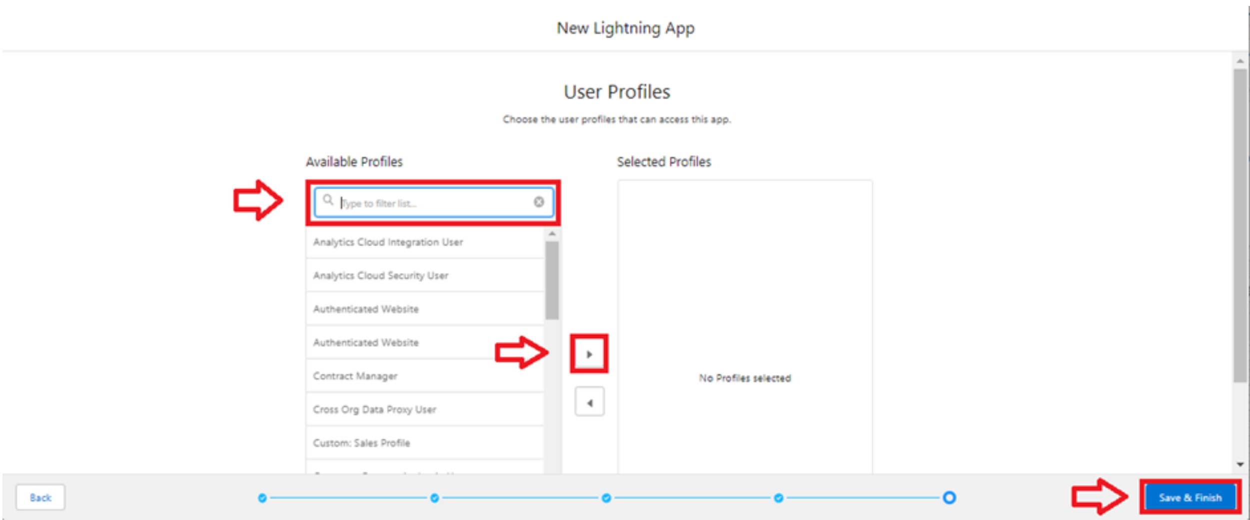
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next



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:



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

Milestone 5 – Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

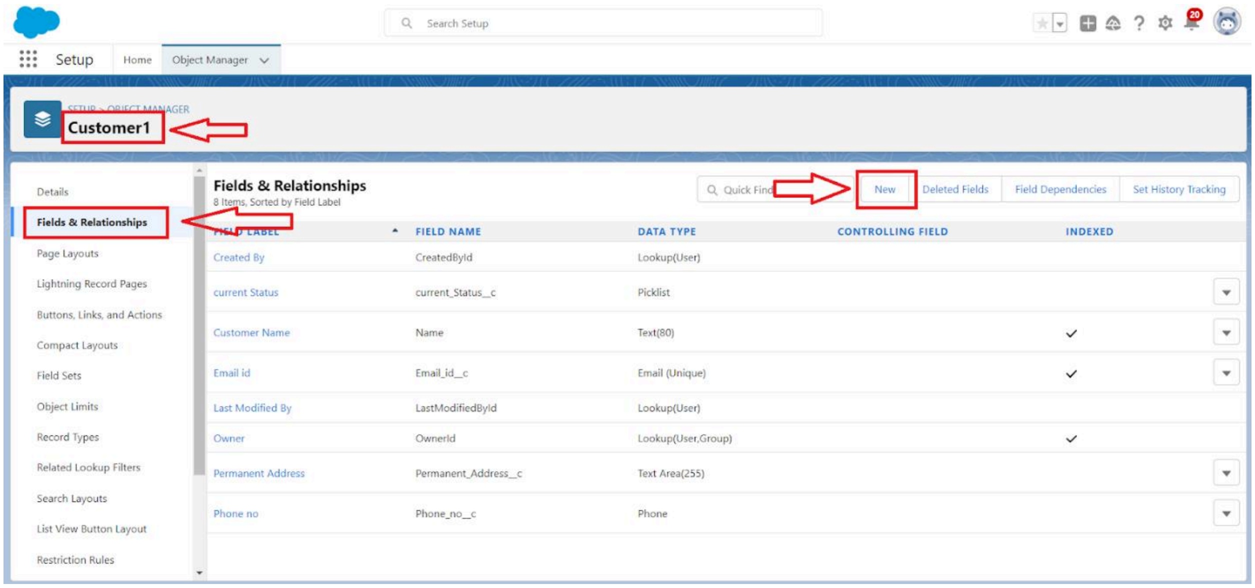
1. Standard Fields
2. Custom Fields

Activity 1: Creation of fields for the customer1 object

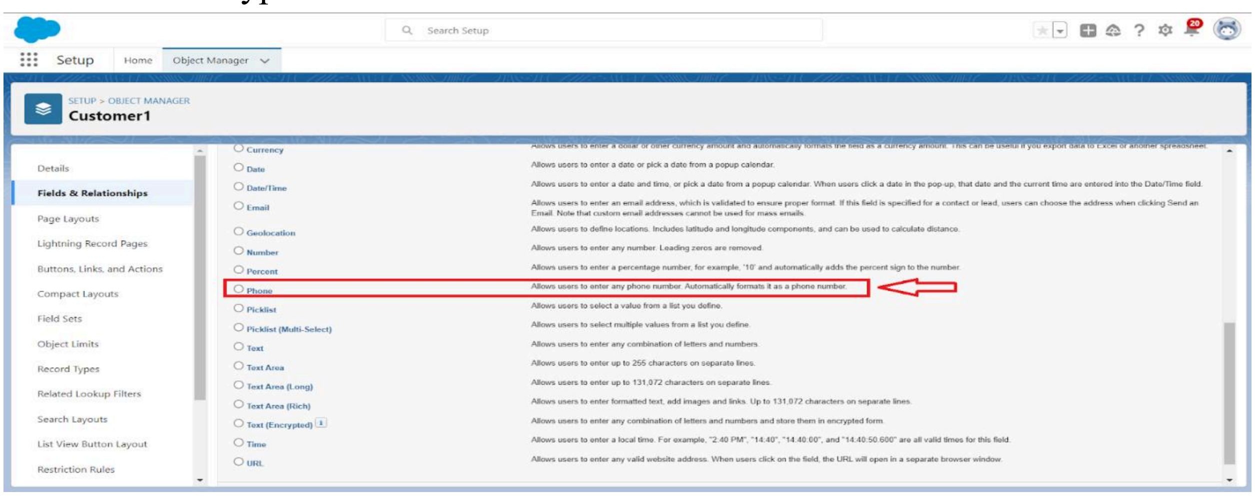
1. To create fields in an object:

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

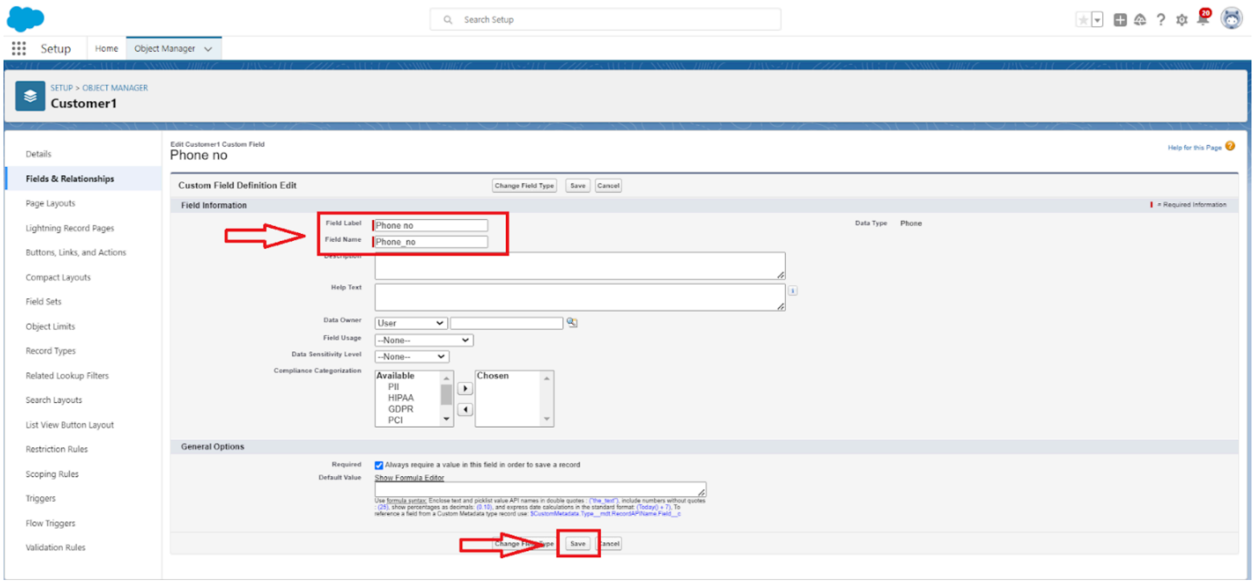
2. Now click on “Fields & Relationships” > New



3. Select Data Type as a “Phone”



4. Click on next



5. 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 object name(Customer1) in search bar > click on the object.

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

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

4. Fill the Above as following:

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

3. To create another 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 “Text Area” and Click on Next

4. Fill the Above as following:

o Field Label: Permanent Address

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

4. To create another 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 “Picklist” and Click on Next
4. Fill the Above as following:

    Field Label: Current Status

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

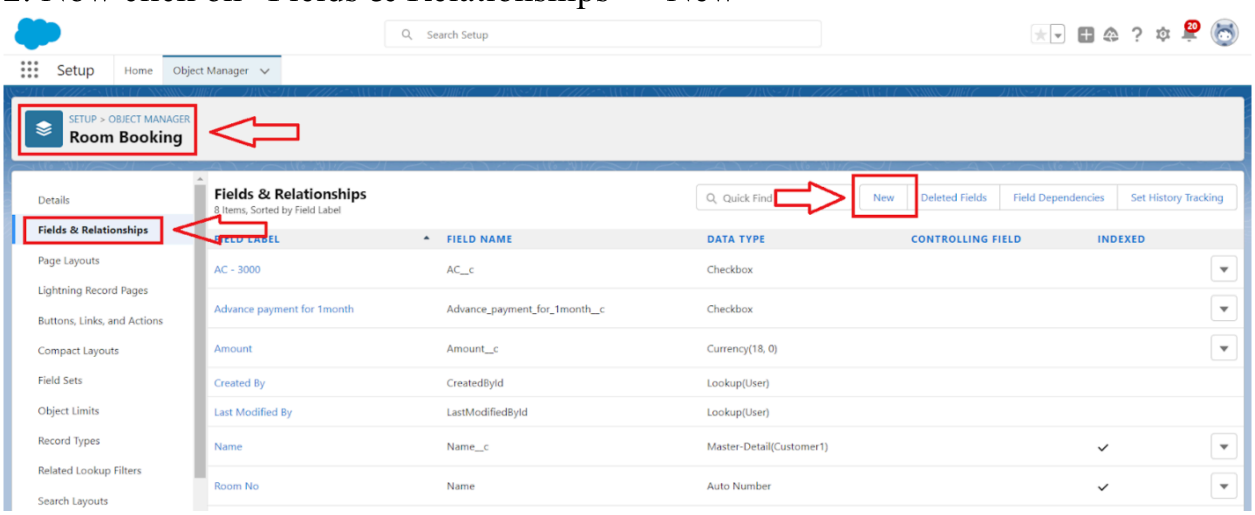
    - Student
    - Employee
    - Others

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

Creation of fields for the Room Booking object

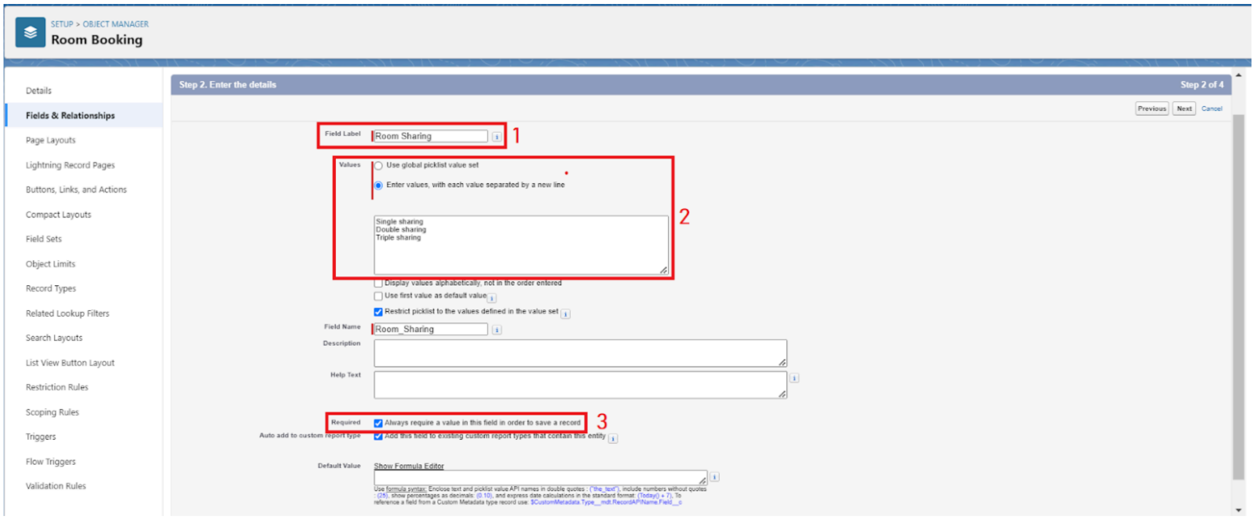
1. To create fields in an object:

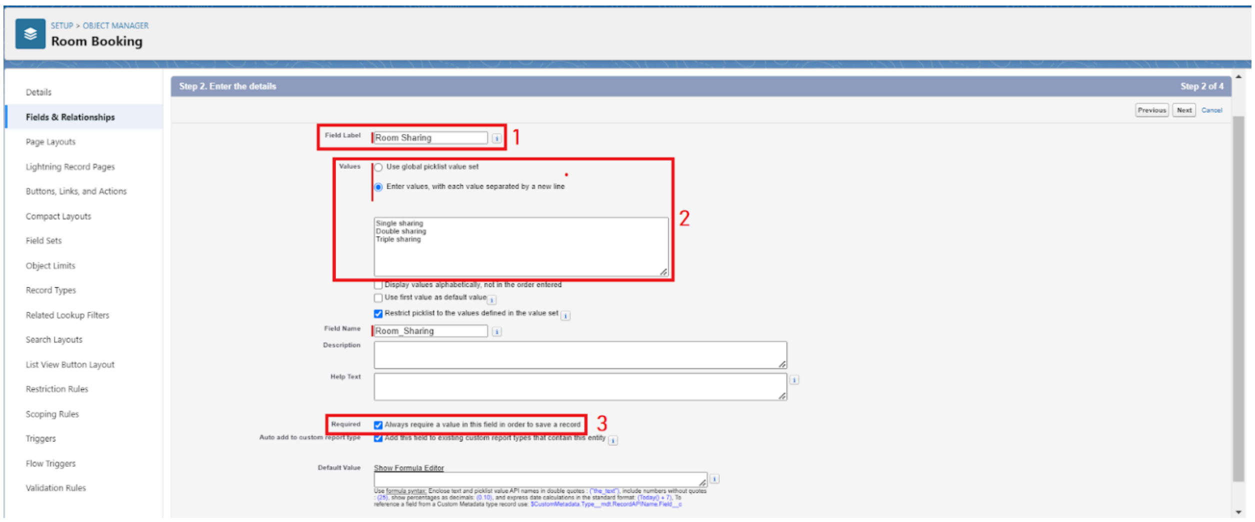
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New



3. Select Data Type as a “Picklist”

4. Click on Next





5. Fill the Above as following:

▪ Field Label: Room Sharing

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

1. Single sharing

2. Double sharing

3. Triple sharing

• Select required

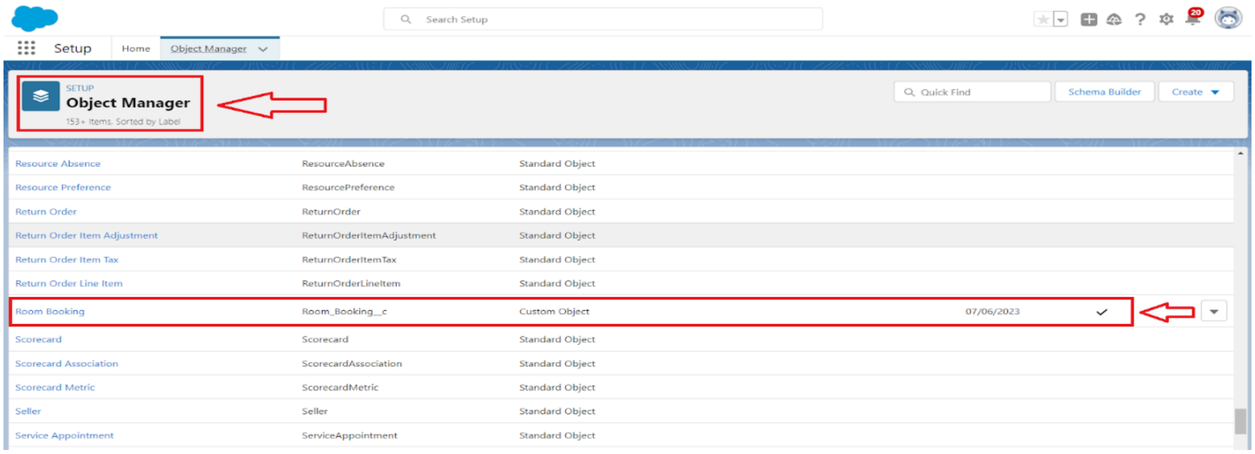
• Click on Next > Next > Save and new.

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

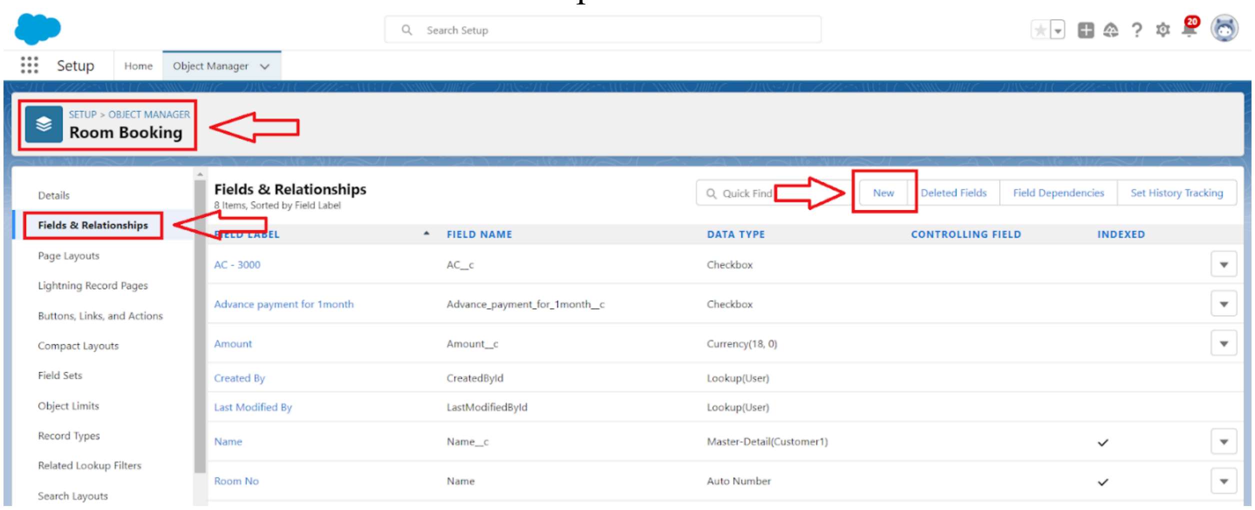
To create fields & relationship to an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in

the search bar > click on the object.

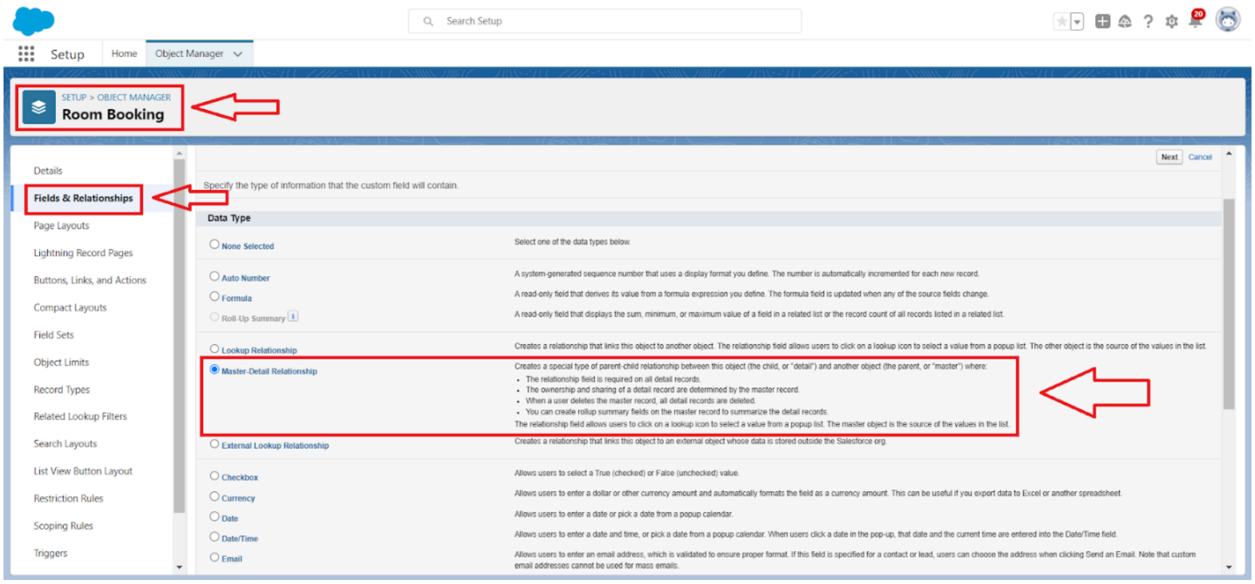


2. Now click on “Fields & Relationships” > New

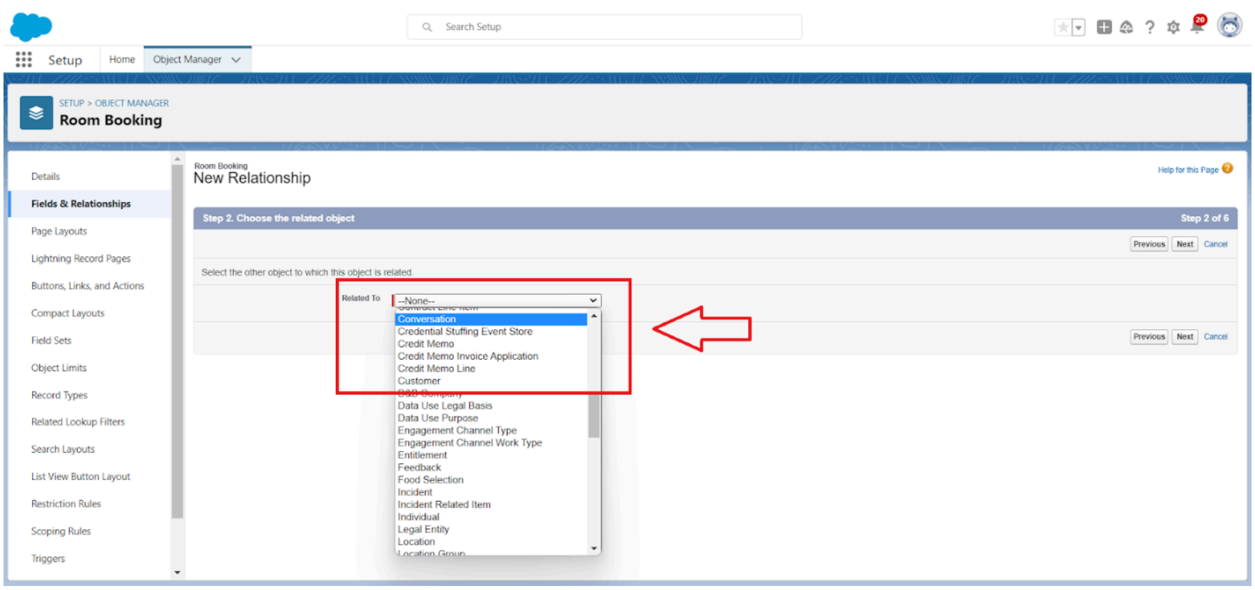


3. Select Data Type as a “Master-detail Relationship”

4. Click on Next

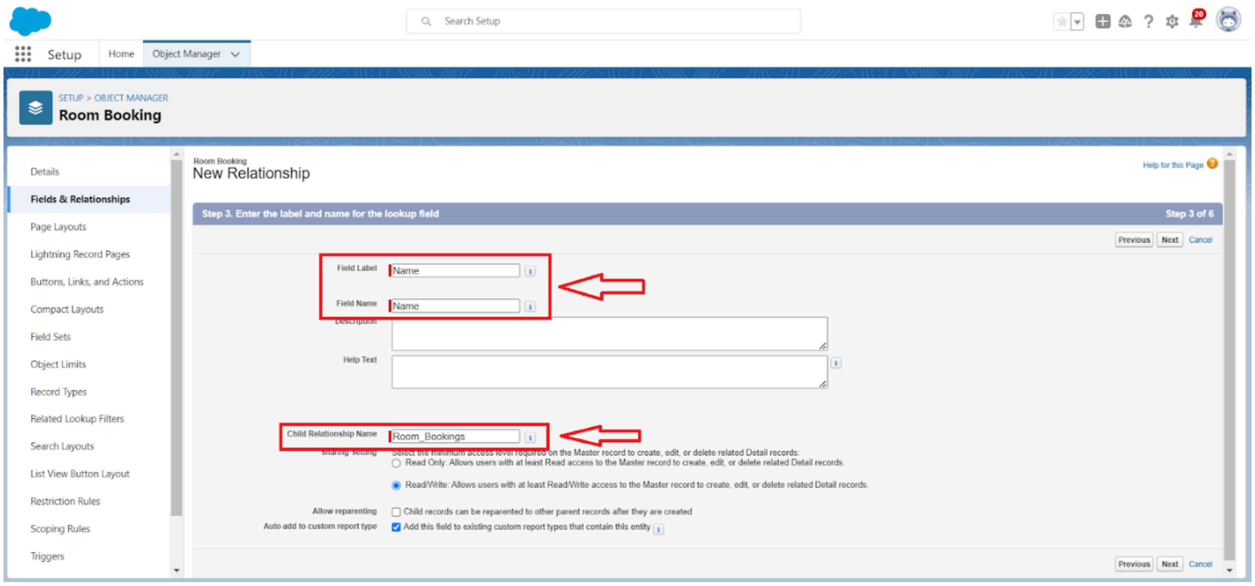


5. Click on the Related to drop down and Select the “Customer1” object and click on Next



6. Fill the Above as following:

- Change the Field Label: Name
- Field Name : It’s gets auto generated



• Click on Next > Next > Save and new.

3. To create fields in an object:

Select Data Type as a “Checkbox"

Fill the Above as following:

• Field Label: AC-3000

• Field Name :It’s gets auto generated

• Click on Next > Next > Save and new

4. To create fields in an object:

Select Data Type as a “Checkbox"

Fill the Above as following:

• Field Label: Advance Payment for 1 Month

• Field Name :It’s gets auto generated

• Click on Next > Next > Save and new

5. To create fields in an object:

Select Data Type as a “Currency"

Fill the 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

Select Data Type as a “Master-detail Relationship"

Fill the Above as following:

- Change the Field Label: Total No Of Rooms
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new.

7. To Create a Rollup Summary Field in “Total Room Object”

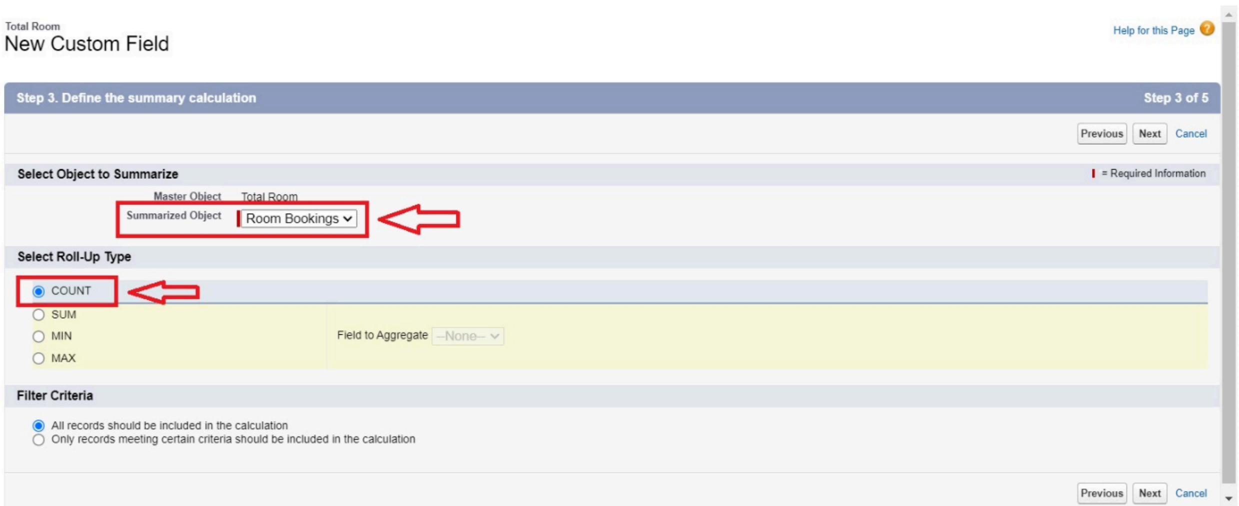
Select Data Type as a “Rollup Summary"

Fill the Above as following:

- Field Label: Rooms Booked
- Field Name :It’s gets auto generated
- Click on Next

Select the Room Bookings in the Summarized Object

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



Click on Next > Next > Save and new

8. To create fields in an object:

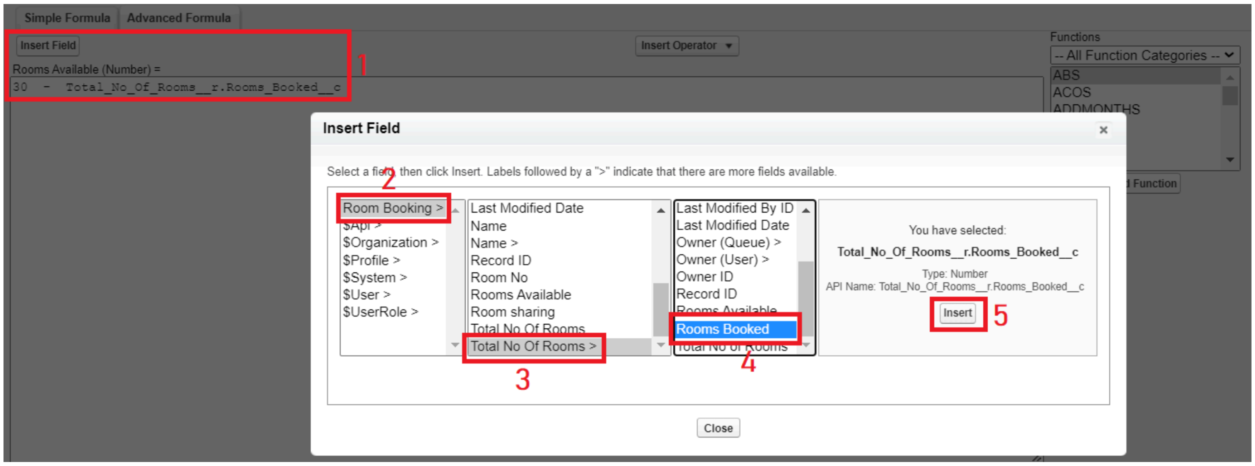
Select Data Type as a “Formula"

Fill the Above as following:

- Field Label: Rooms Available
- Field Name : It’s gets auto generated
- Select the Formula Return Type as “Number”
- Select the Decimal places as “0” and Click on Next

• Click on the Advanced Formula and Enter the value in formula box “ 30 - ” and Click on insert field than you will find a pop window under the Room Booking select the Total No Of Rooms in the second Column and select the Room Booked in the third column and click on insert

"30 - Total_No_Of_Rooms__r.Rooms_Booked__c ” and Check Syntax



• Click on Next > Next > Save and new.

9. To create fields in an object:

Select Data Type as a “Checkbox"

Fill the Above as following:

• Field Label: Check in

• Field Name :It’s gets auto generated

• Click on Next > Next > Save and new

10. To create fields in an object:

Select Data Type as a “Checkbox"

Fill the Above as following:

• Field Label: Check Out

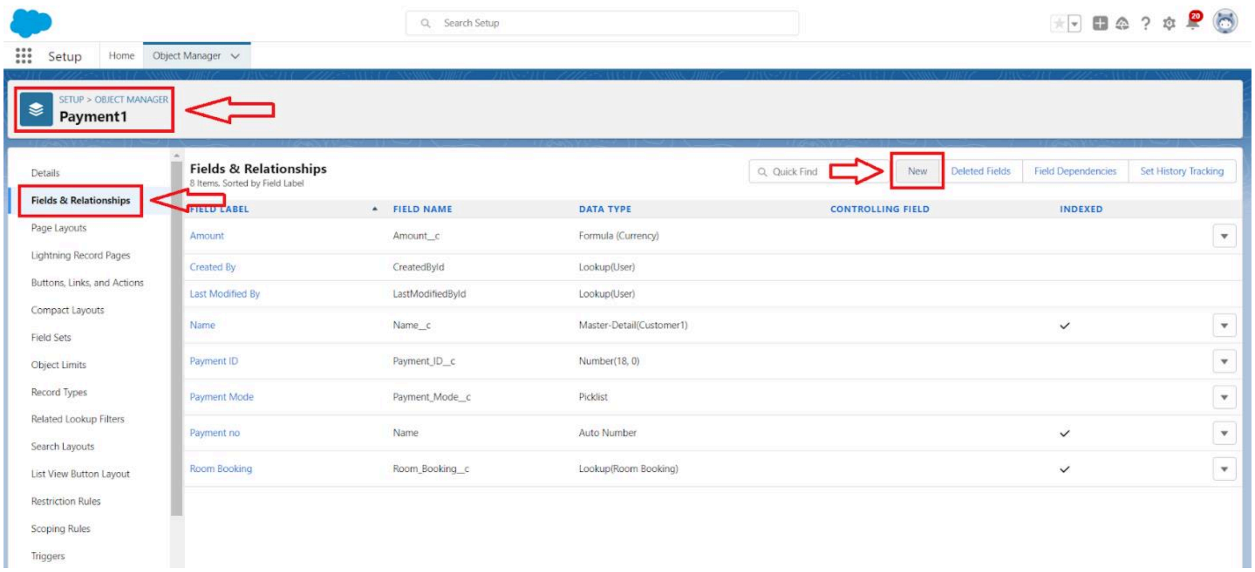
• Field Name :It’s gets auto generated

• Click on Next > Next > Save and new

Creation of Fields & Relationship for Payment1 Object

1. To create fields & relationship to an object:

Select Data Type as a “Master-detail Relationship"



4. Click on Next

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

6. Fill the Above as following:

• Change the Field Label: Name

• Field Name :It’s gets auto generated

• Click on Next > Next > Save and new

2. To create another fields & relationship to an object:

Select Data Type as a "Lookup Relationship"

Fill the Above as following:

• Change the Field Label: Room Booking

• Field Name :It’s gets auto generated

• Click on Next > Next > Save and new.

3. Creation of another fields for the Payment1 object

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

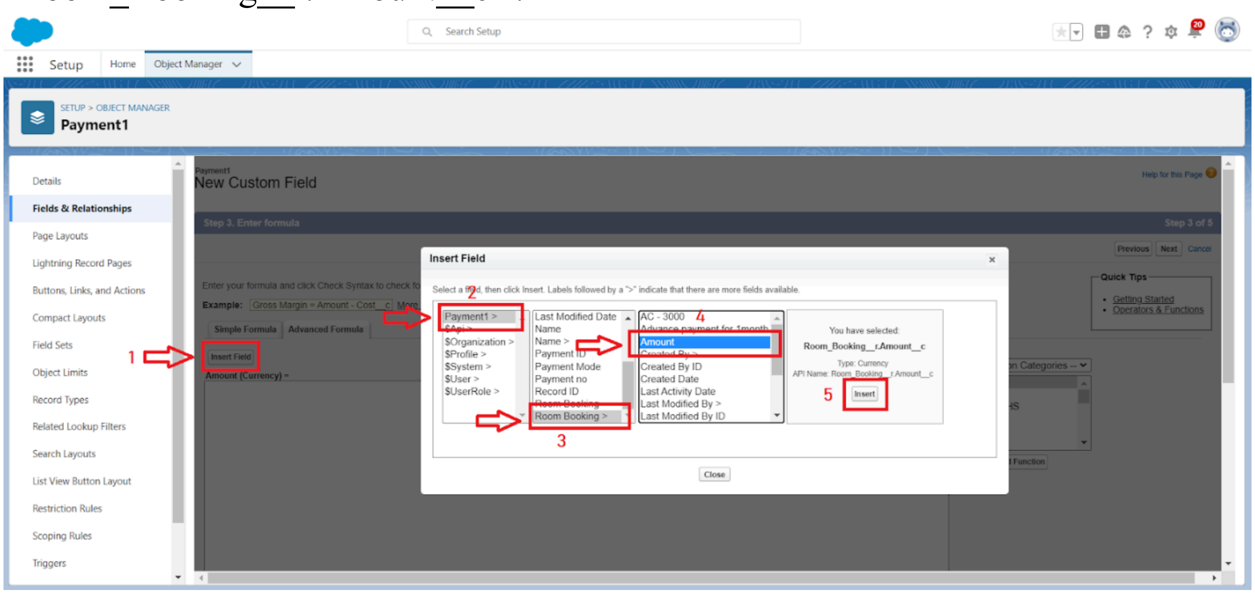
2. Check

3. Credit card

4. Debit card
5. UPI
6. Phonepe
7. Gpay
8. Paytm
• Select required
• Click on Next > Next > Save and new

4. Create a Cross object formula Field in Payment1 Object

Select Data Type as a "Formula"
Enter the Field label: Amount and Field name: gets auto generated and click on Next. In the Advanced Formula Click on the Insert field in the popup Screen Select the Payment1 and in the second 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 ".



Click on the Check syntax: No syntax errors in merge fields
Click on Next > Next > Save and new.

Creation of fields for the Food Selection object

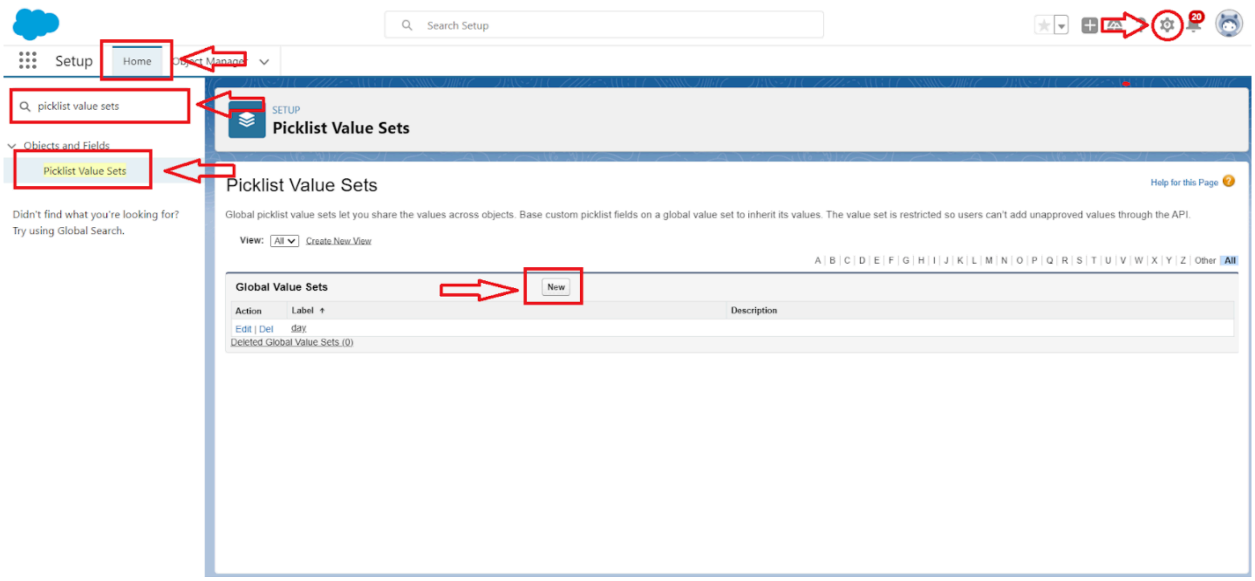
1. To create fields & relationship to an object:

Select Data Type as a “Master-detail Relationship"
Fill the Above as following:

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

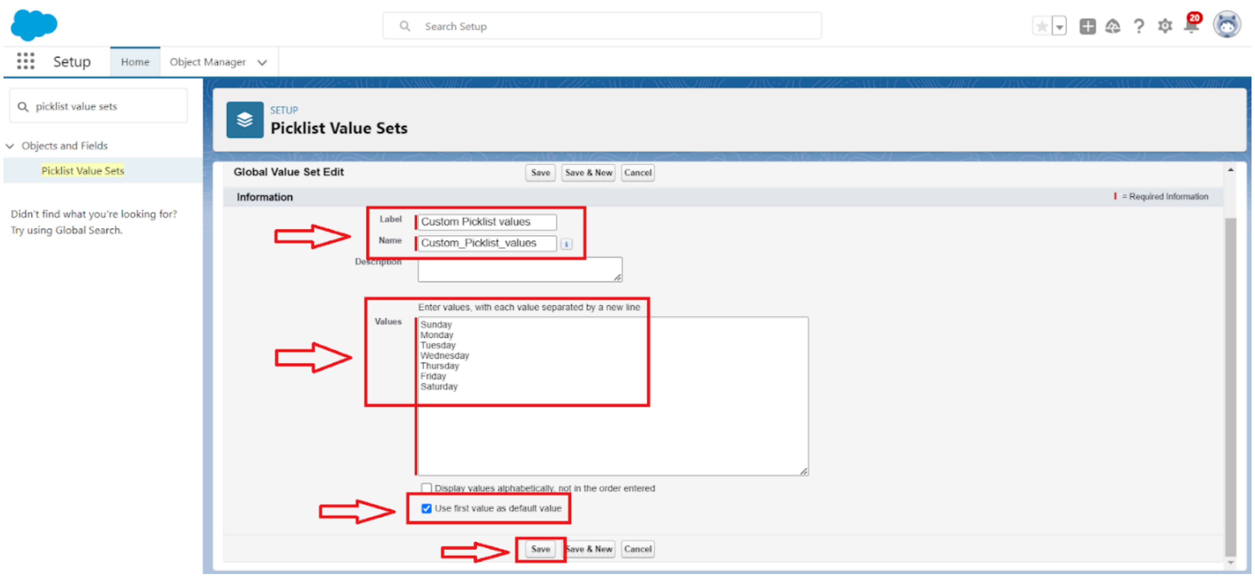
Create a picklist value set:

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



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

• Sunday
• Monday
• Tuesday
• Wednesday
• Thursday
• Friday
• Saturday



6. Check the Use first value as default value and Click on save.

2. Create a picklist Field for Food selection object

Select Data Type as a "Picklist"

Fill the Above as following:

• Field Label: Breakfast

• Under Value - Select the Use global picklist value set

• Under the drop down select the Custom Picklist Values

• Select required

• Click on Next > Next > Save and new

3. Create a another picklist Field for Food selection object

Select Data Type as a "Picklist"

Fill the Above as following:

• Field Label: Select Breakfast

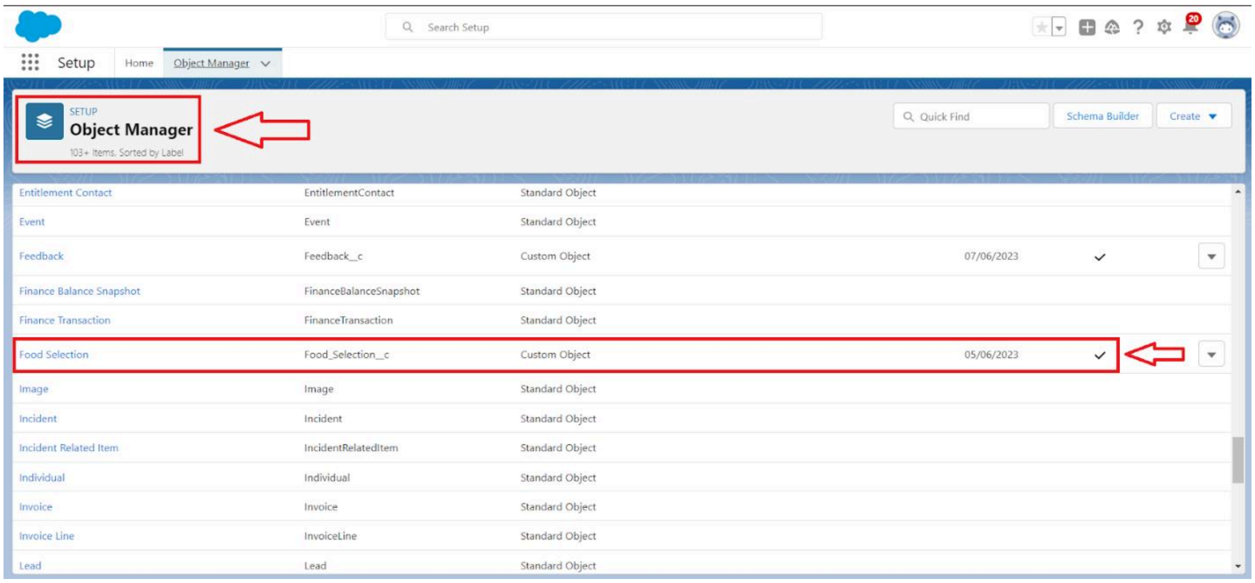
• Under Value - Enter values, with each value separated by a new line

- Idli
- Bonda
- Dosa
- Upma
- Vada
- Puri
- Chapati

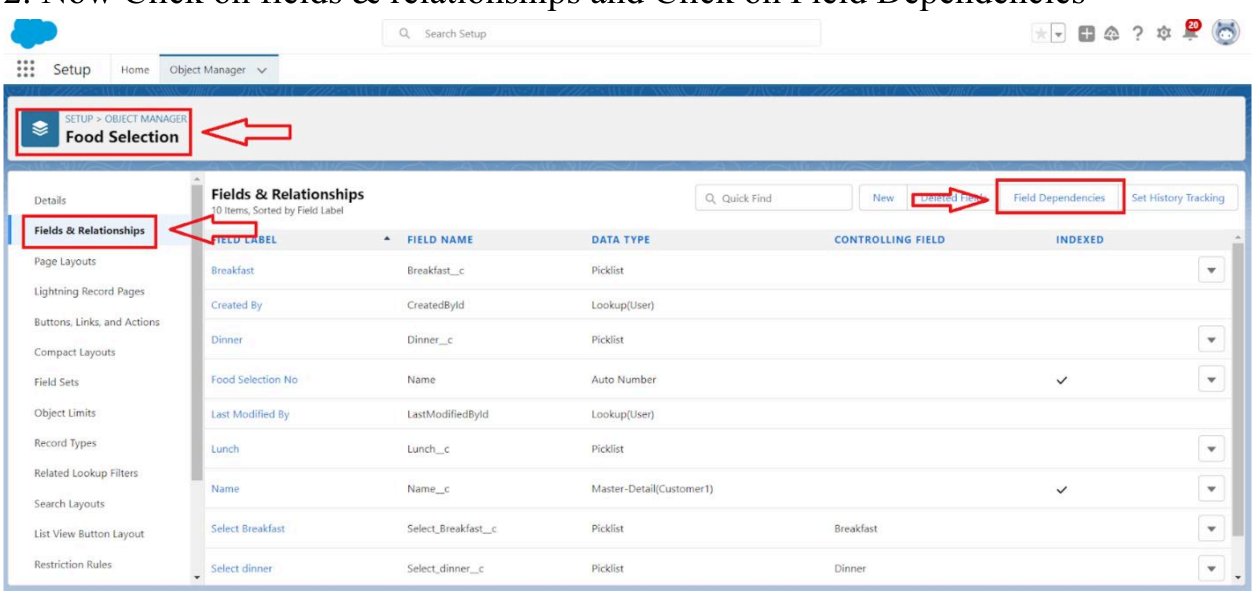
• Select Checkbox Use First value as default Value
• Click on Next > Next > Save and new.

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

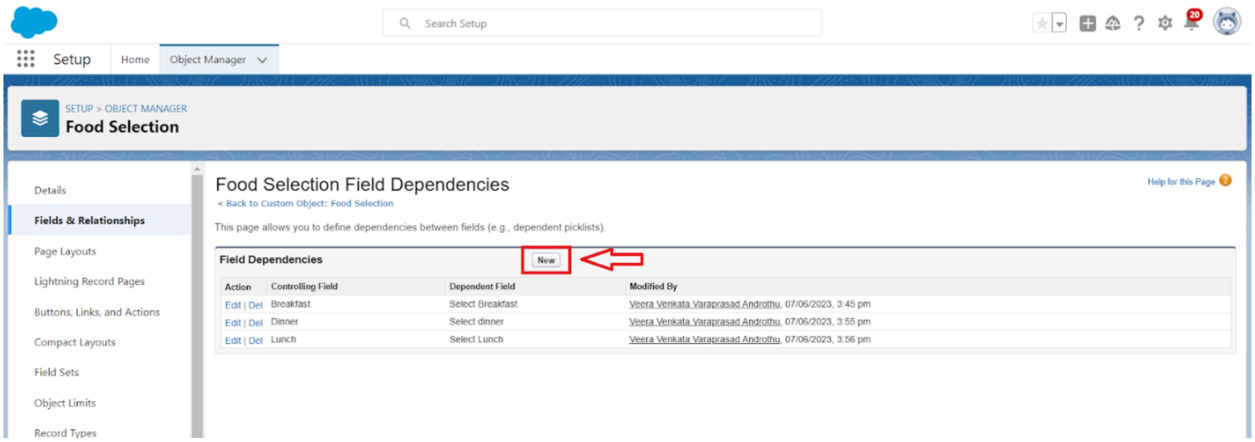
1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.



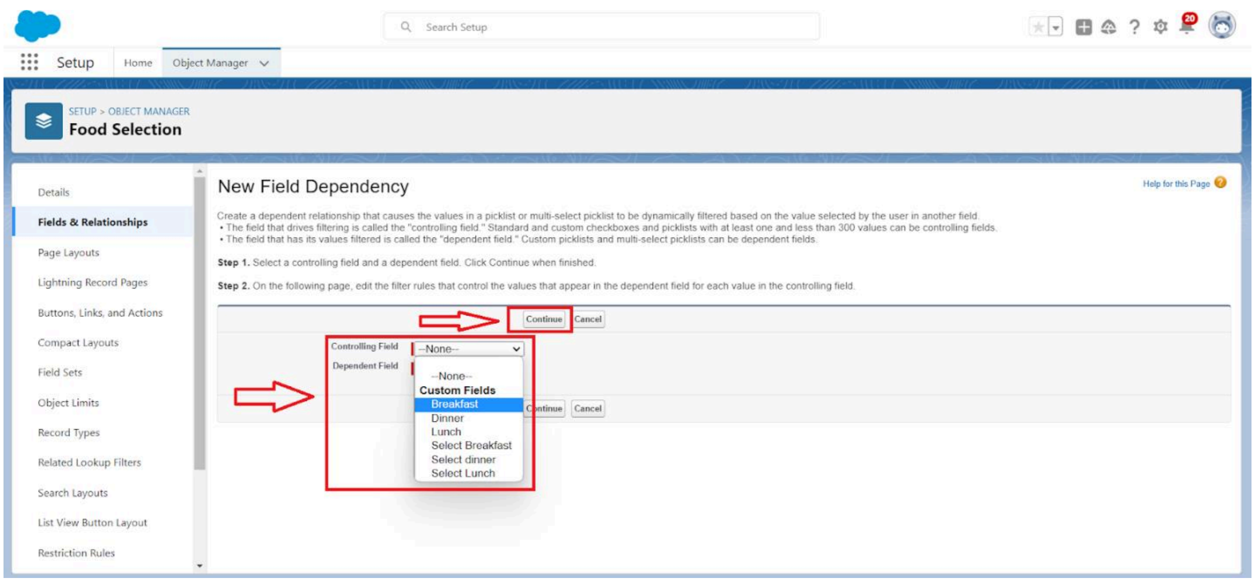
2. Now Click on fields & relationships and Click on Field Dependencies



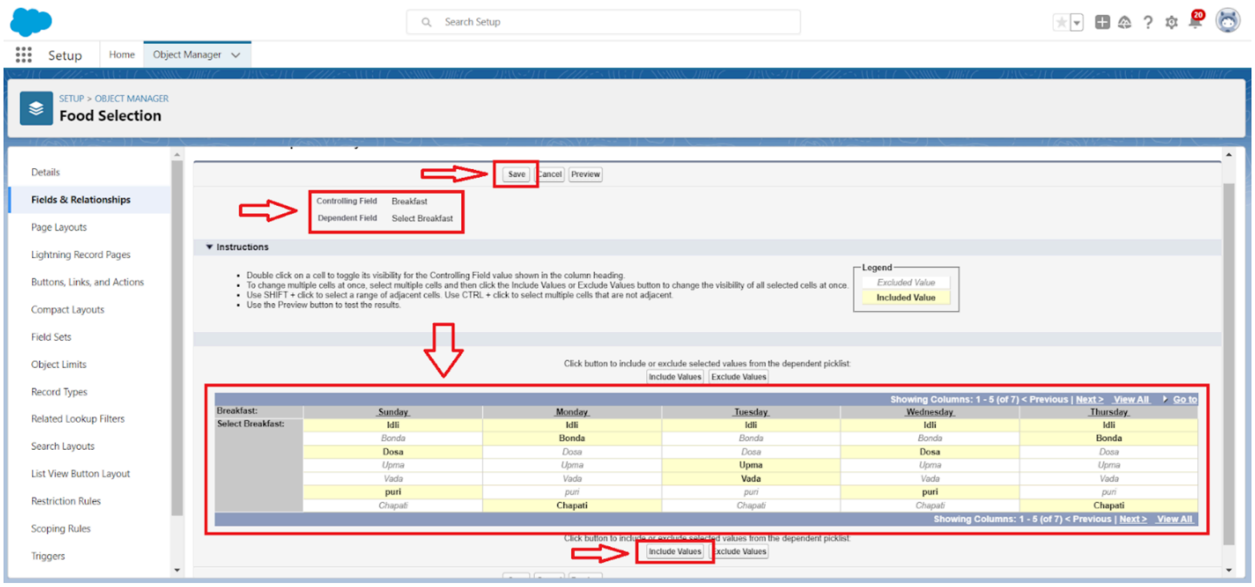
3. Now Click on New Option



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



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



4. To create fields in an object:

Select Data Type as a "Picklist"

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:

Select Data Type as a "Picklist"

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 > 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: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 and Click on Include Values in such a way that do for the remaining days and click on save.

6. To create fields in an object:

Select Data Type as a "Picklist"
Fill the Above as following:

• Field Label: Dinner
• 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.

7. To create fields in an object:

Select Data Type as a "Picklist"
Fill the Above as following:

• Field Label: Select Dinner
• 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.

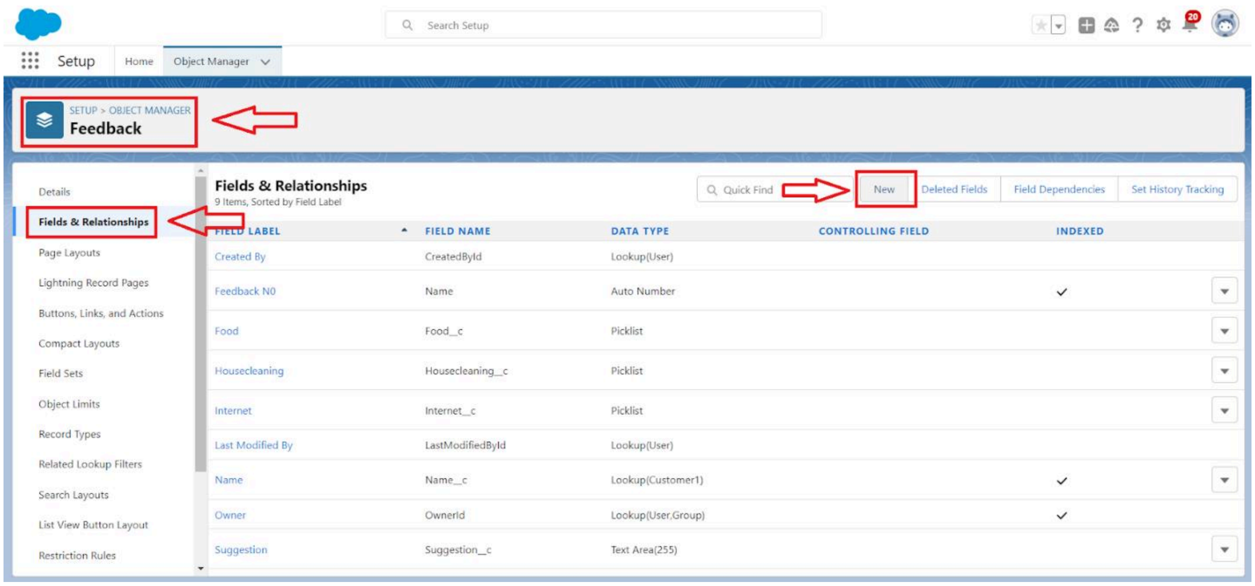
To create a Field dependencies for Dinner and Select Dinner.

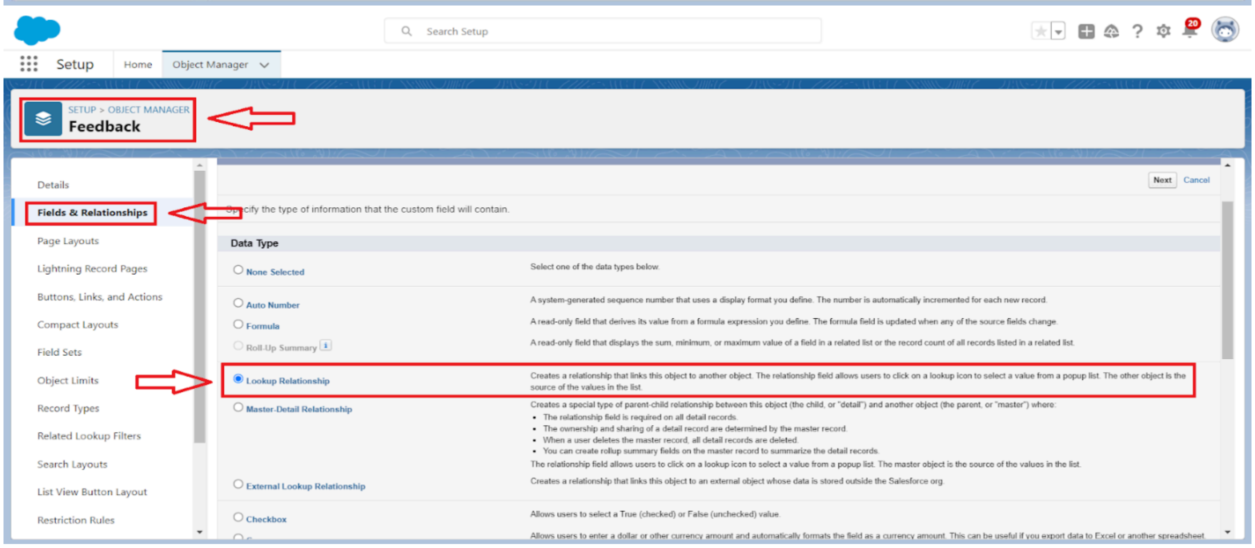
- Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
- Now Click on fields & relationships and Click on Field Dependencies
- Now Click on New Option
- Under Controlling Field: Dinner, Dependent Field: Select Dinner and Click on Continue
- Under the Sunday Ctrl and select the Picklist values Chicken biryani, curd rice, Chicken noodles and Click on Include Values in such a way that do for the remaining days and click on save.

Creation of fields for the Feedback object

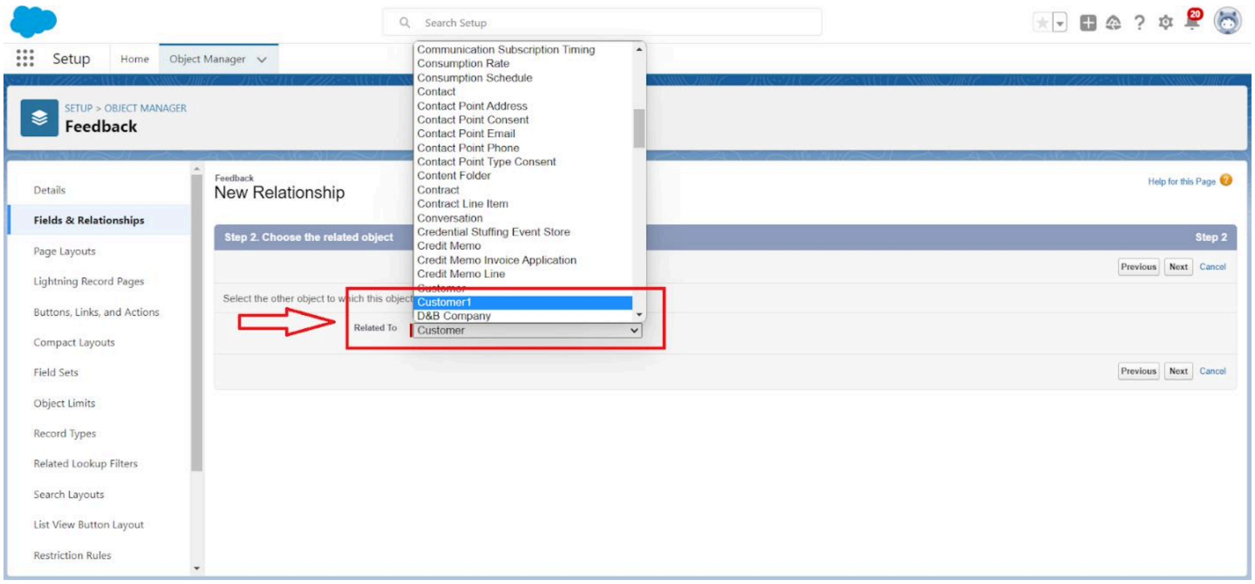
1. create fields & relationship to an object:

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





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

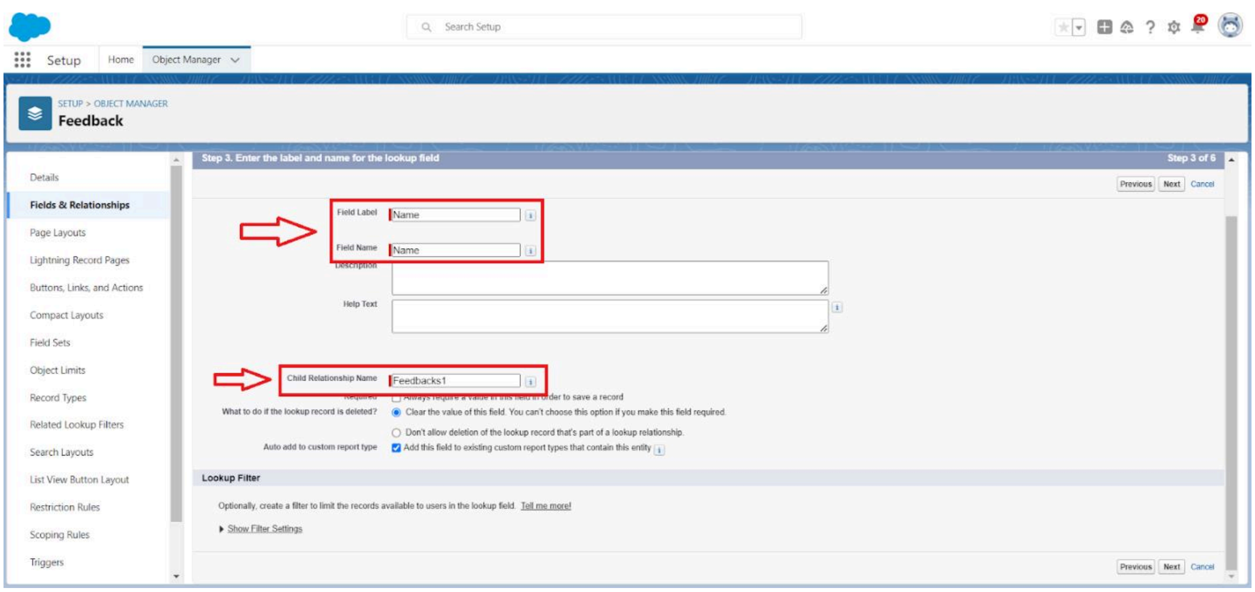


4. Fill the Above as following:

• Change the Field Label: Name

• Field Name :It's gets auto generated

• Click on Next > Next > Save and new.



2. To create Another fields in an Same object:

Select Data Type as a "Picklist"

Fill the Above as following:

• Field Label: Roomcleaning

• Field Name :It's gets auto generated

• Under Values select Enter values, with each value separated by a new line

1. Good
2. Satisfaction
3. Bad

• Click on Next > Next > Save and new.

3. To create a Another Fields in an Same Object

Select Data Type as a "Picklist"

Fill the Above as following:

• Field Label: Internet
• Field Name :It's gets auto generated
• Under Values select Enter values, with each value separated by a new line

1. Good
2. Satisfaction
3. Bad

• Click on Next > Next > Save and new.

4. To create a Another Fields in an Same Object

Select Data Type as a "Picklist"

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 line4

1. Good
2. Satisfaction
3. Bad

• Click on Next > Next > Save and new.

5. To create a Another Fields in an Same Object

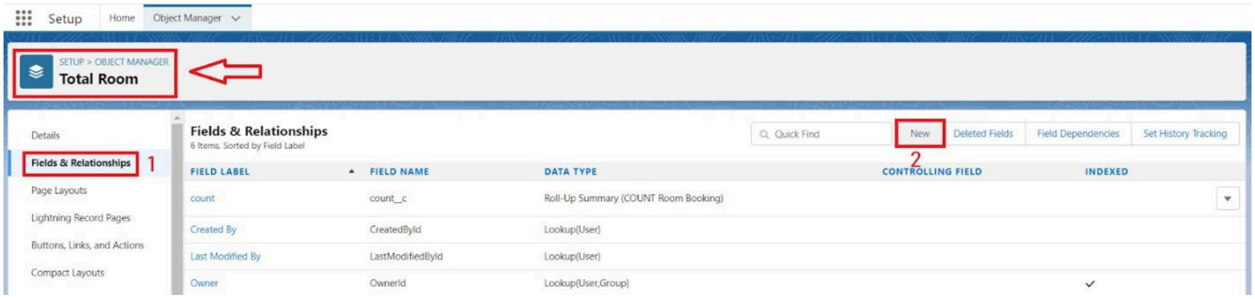
Select Data Type as a "Text area"

Fill the Above as following:

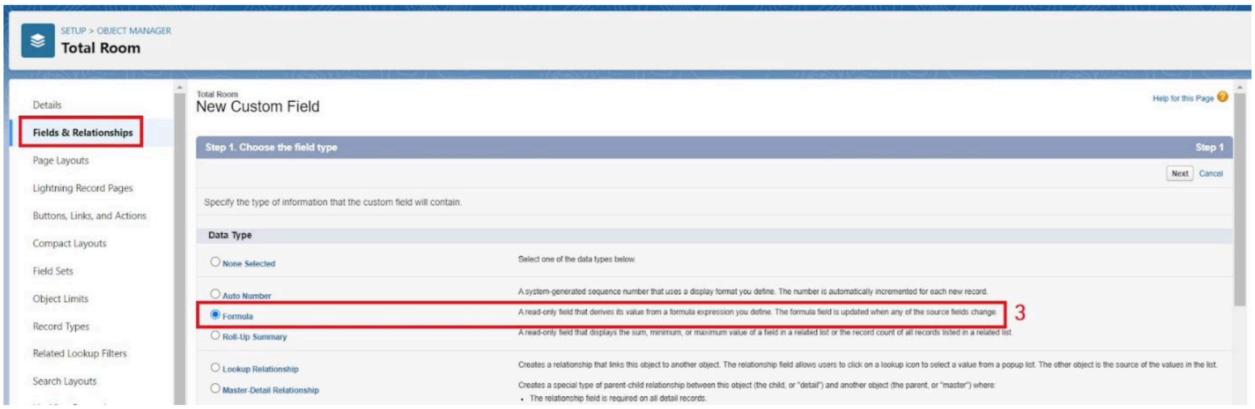
• Field Label: Suggestion
• Field Name :It's gets auto generated
• Click on Next > Next > Save and new.

Creation of fields for the Total Rooms object

Now click on “Fields & Relationships” > New



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



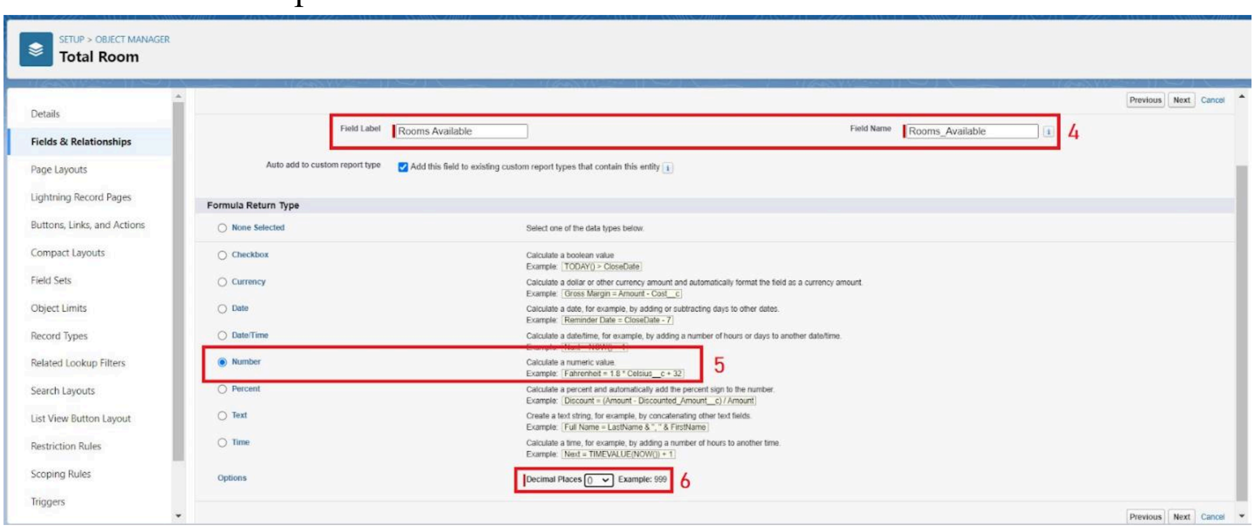
Fill the Above as following:

Field Label: Rooms Available

Field Name : It’s gets auto generated

Select the Formula Return Type as “Number”

Select the Decimal places as “0” and Click on Next

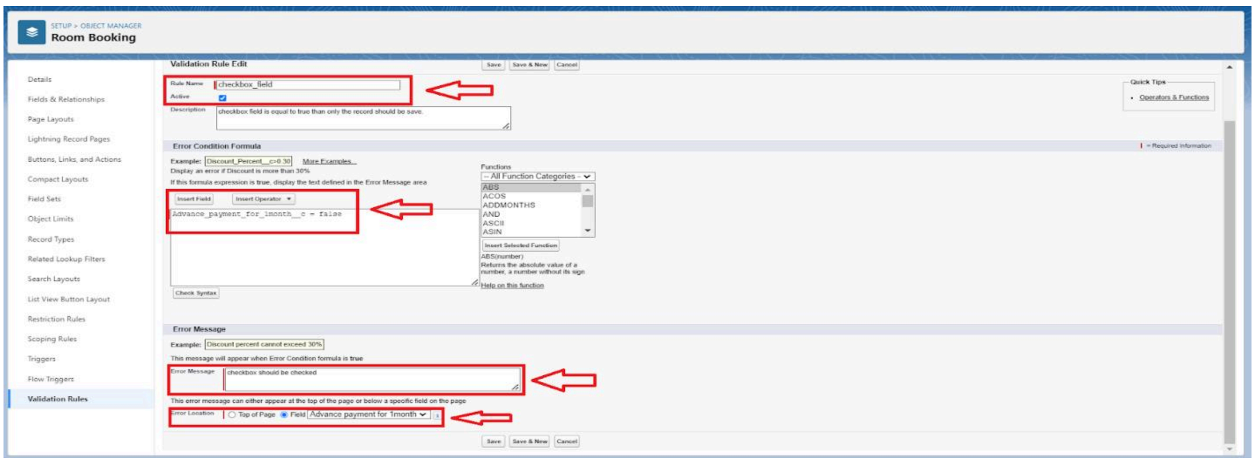


Note: I am Considering “Total No Of Rooms = 30” While creating a new record in Total Rooms Object.

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

create a validation rule to an Room Booking Object

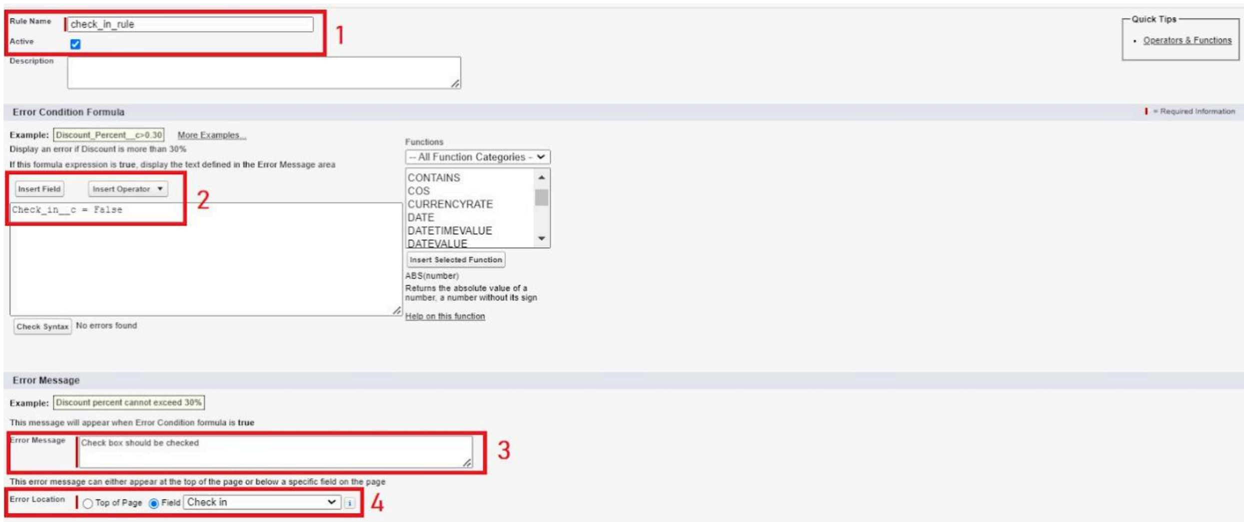
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Validation rule” at top > New.
3. Enter Rule name “checkbox field” and make the validation should be Active.
4. Enter the formula in the formula Box “Advance_payment_for_1month__c = 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.

create a Another validation rule to an 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 “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)



7. Click on save.

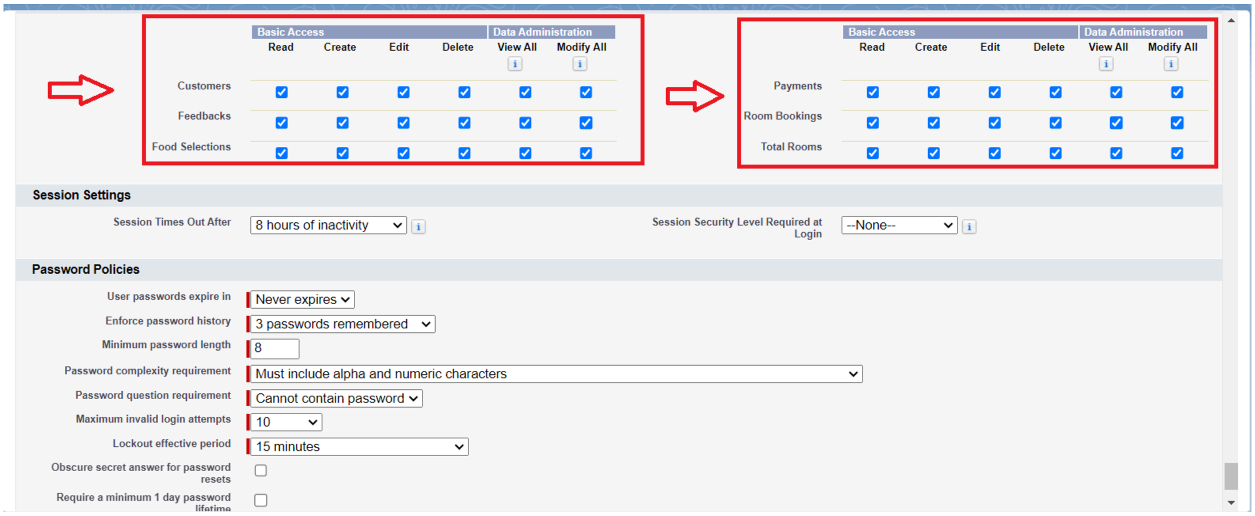
Custom user Profile

To create a new profile:

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard User)
2. Enter profile name (Custom User) > Save.

3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give All access permissions for Customers,

Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

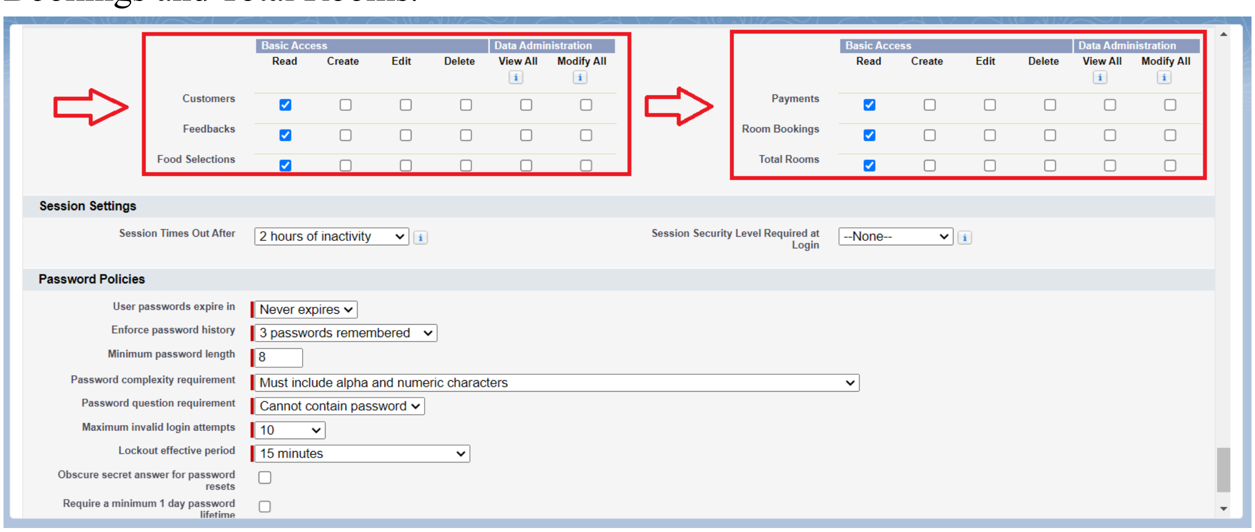


5. Scroll down and Click on Save.

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

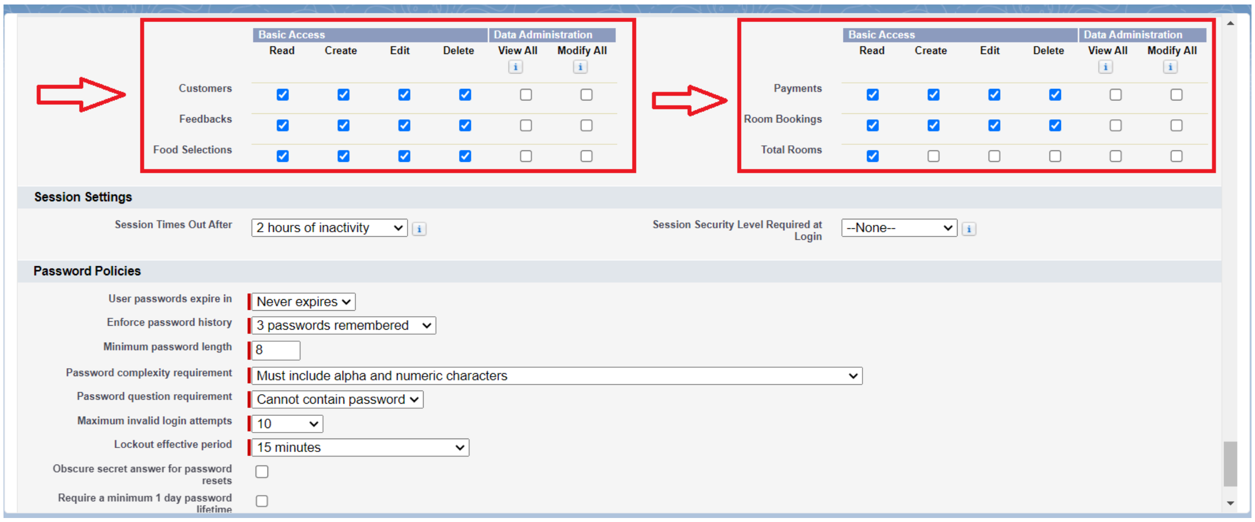


5. Scroll down and Click on Save.

Custom platform user2

To create a new profile:

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard platform User)
2. Enter profile name (Custom platform User2) > Save.
3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give Create, Read, Edit and Delete access permissions for Customers, Feedbacks, Food selections, Payments and Room Bookings. And Read Access permission for Total Rooms Object.



5. Scroll down and Click on Save.

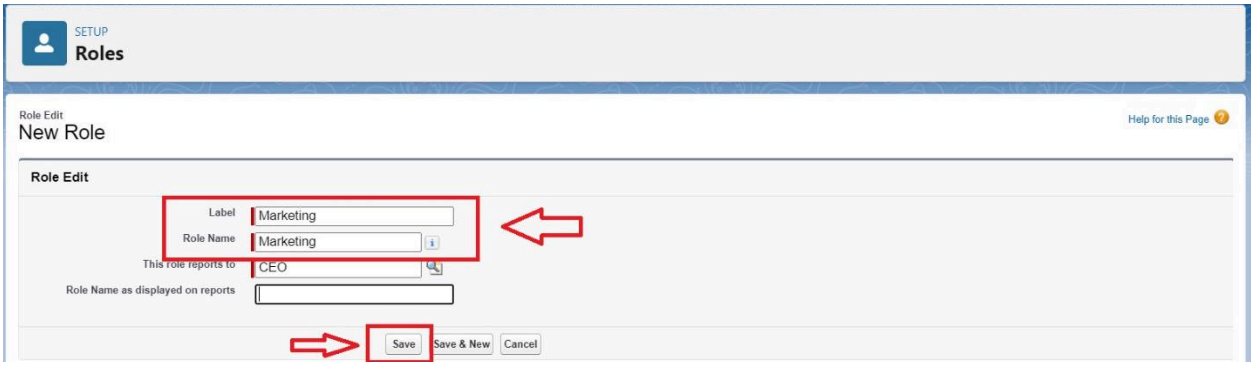
Roles

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.

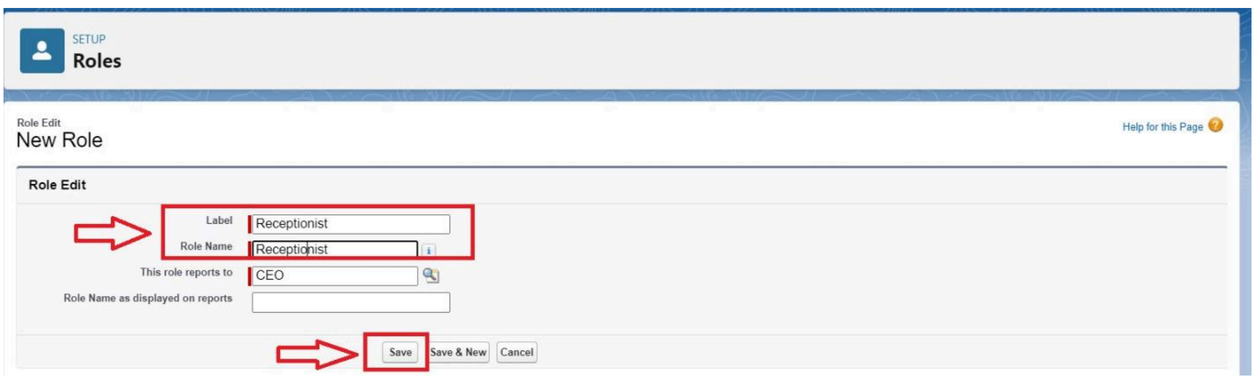
3. Give Label as “Marketing” and Role name gets auto populated.



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.

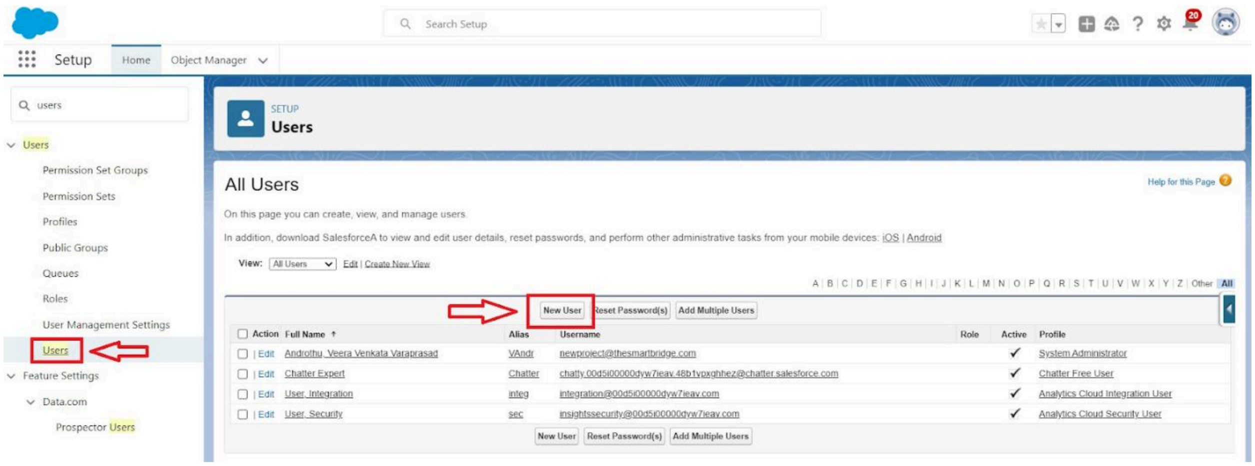


4. Then click on Save.

Users

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

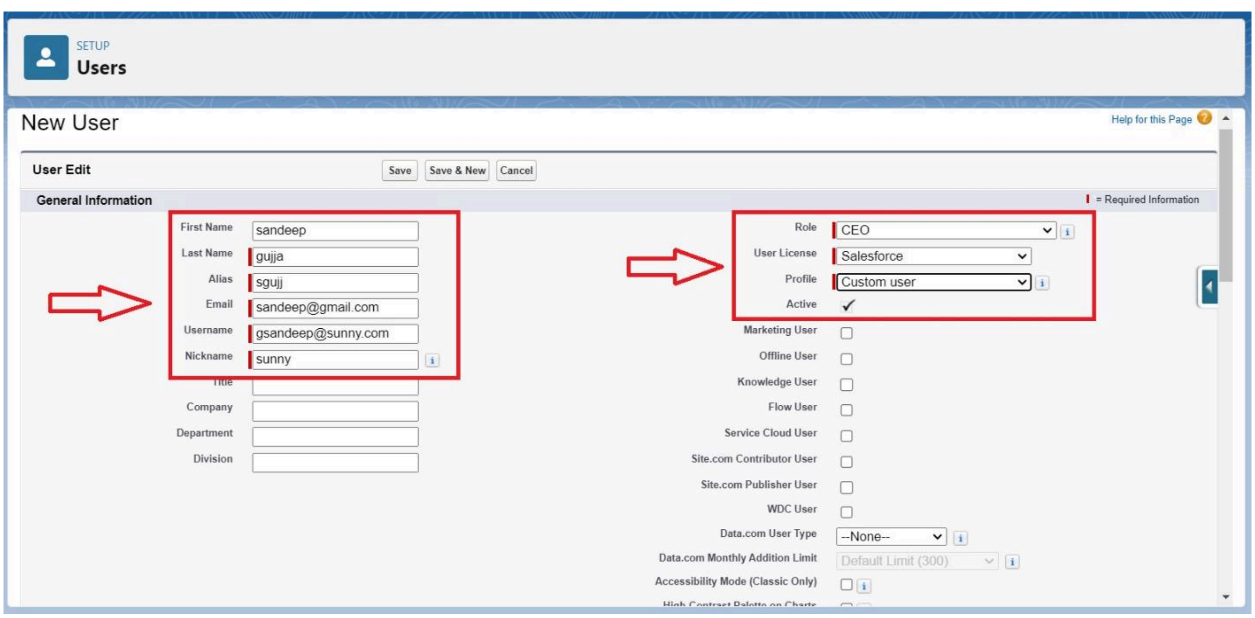
• Username : Username should be in this form: text@text.com

• Nick Name : Give a Nickname

• Role : CEO

• User licence : Salesforce

• Profiles : Custom user



3.save.

Create Another User

1.Go to setup > type users in quick find box > select users > click New user.
2.Fill in the fields
• First Name : Abhilash
• Last Name : garapati
• 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 : Marketing
• User licence: Salesforce platform
• Profiles : Custom Platform User1
3.save

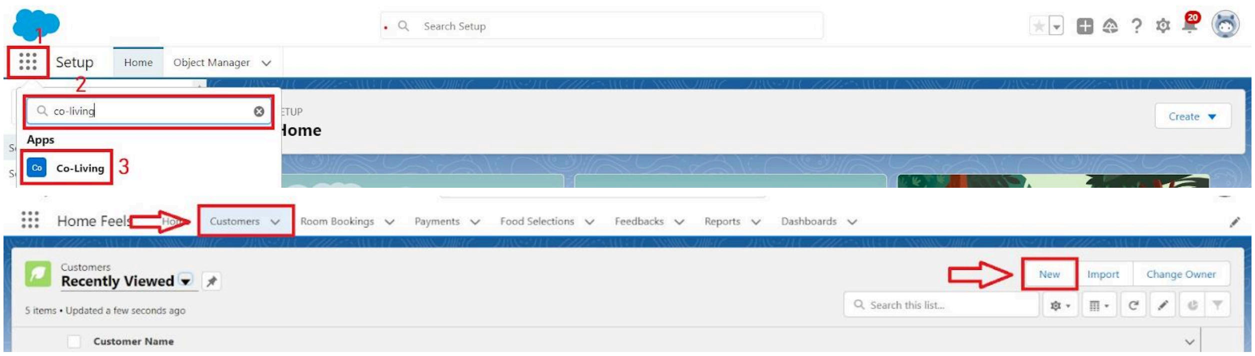
Create Another User

1.Go to setup > type users in quick find box > select users > click New user.
2.Fill in the fields
• First Name : Ganesh
• Last Name : gelli
• 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 : Receptionist
• User licence: Salesforce Platform
• Profiles : Custom Platform user2
3.Save

User Adoption

Create a Record (Customers)

1.Click on App Launcher on the left side of the screen.
2.Search Home Feels & click on it.

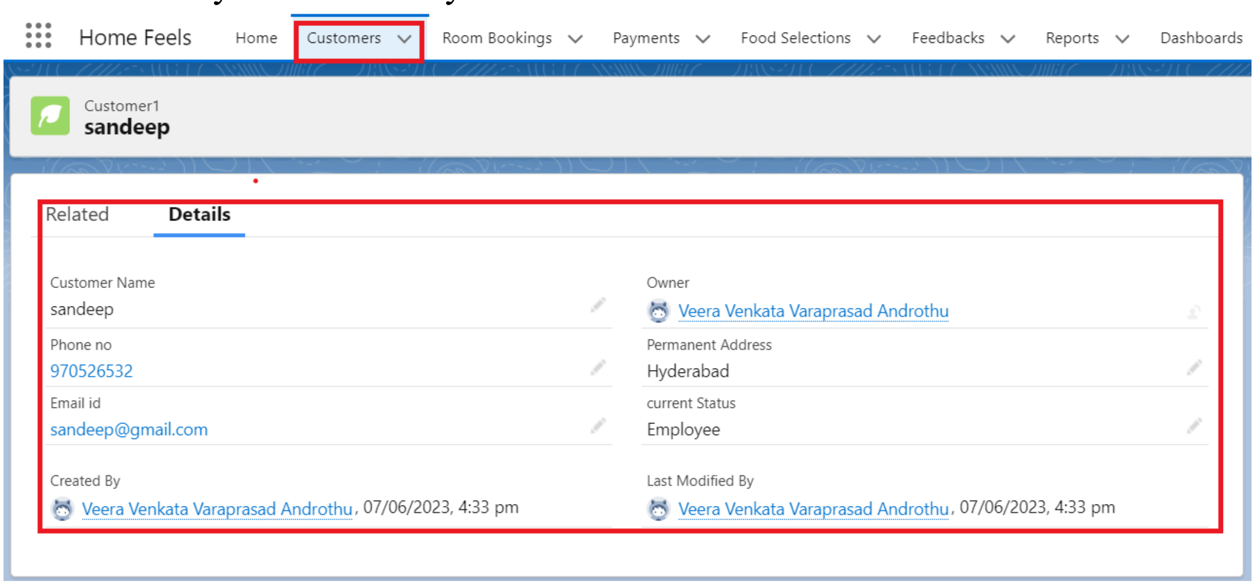


3.Click on the Customers Tab.

4.Click new and fill details & Save

View a Record (Customers)

1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on Customer Tab.
4. Click on any record name. you can see the details of the Customer.



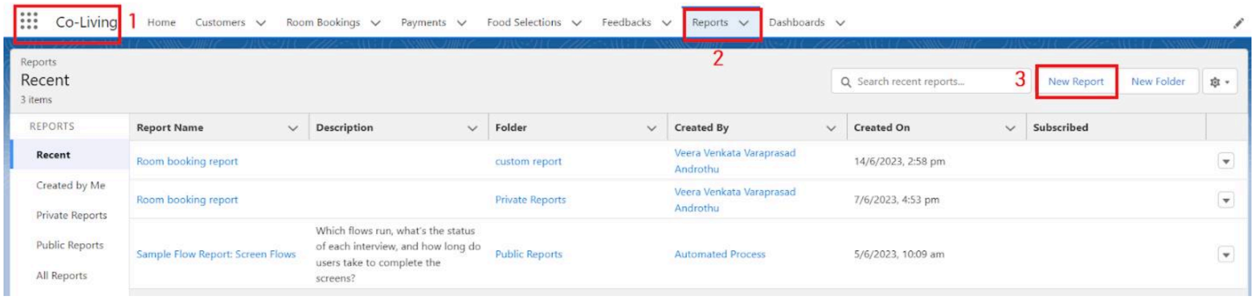
Delete a Record (Customers)

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.

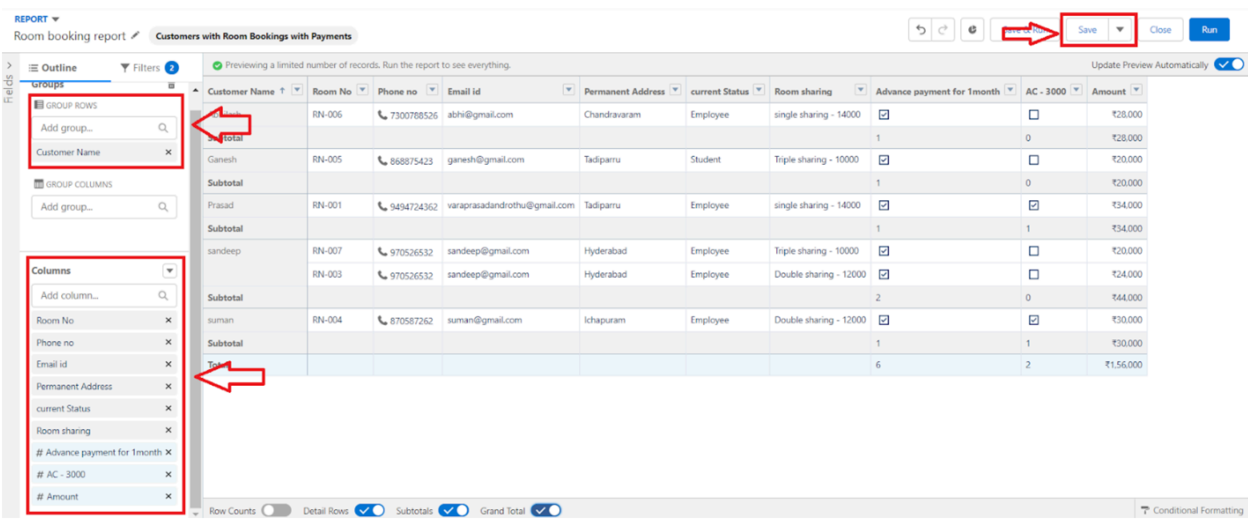
Reports

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.

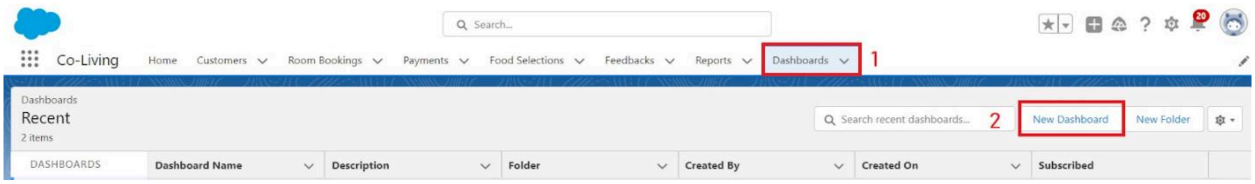
Create another Report

1. Go to the app > click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel Select customer with Room booking with Payments ? click on start report.
4. Customize your report
5. Add fields from left pane as shown Above
6. Save or run it.

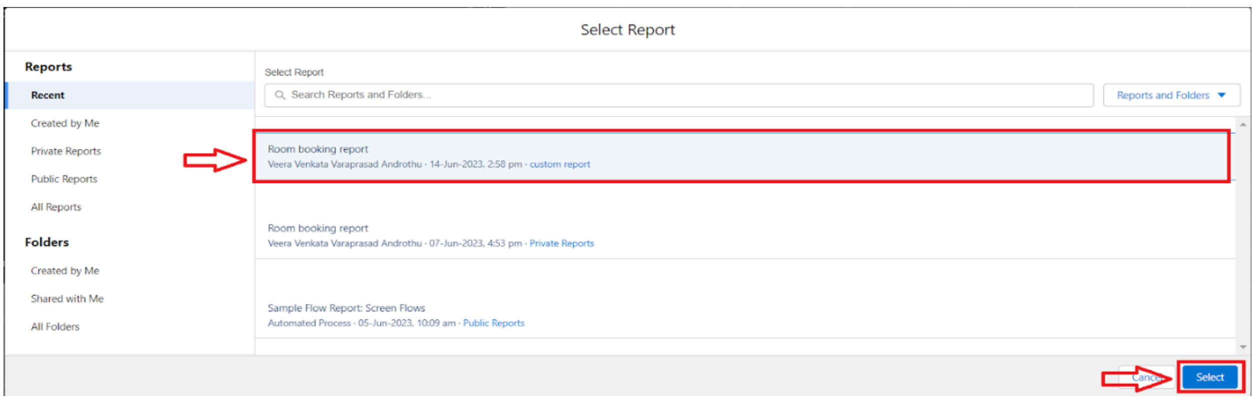
Dashboards

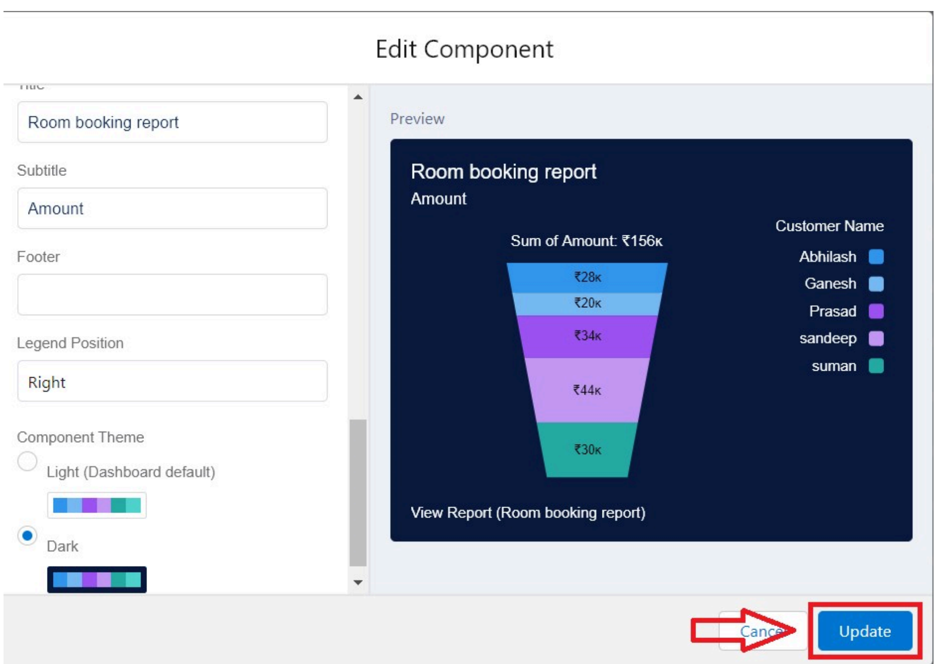
Create Dashboard

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.

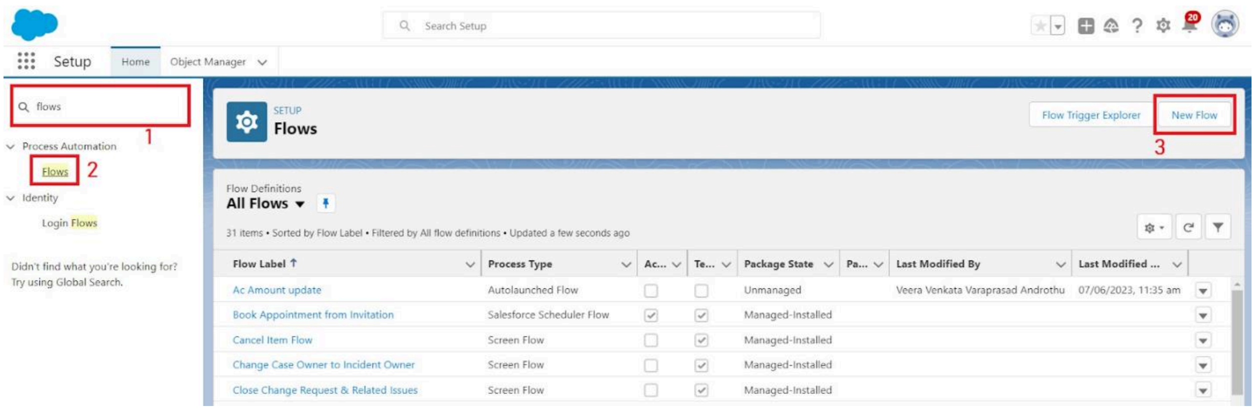
Create Another Dashboard

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

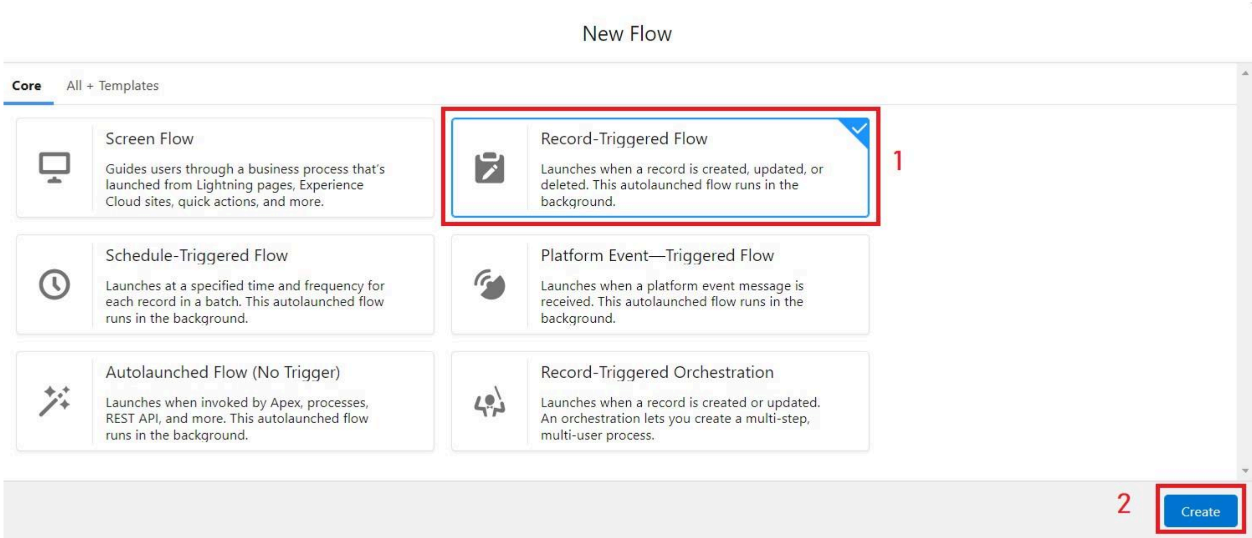
Flows

Create a Flow

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



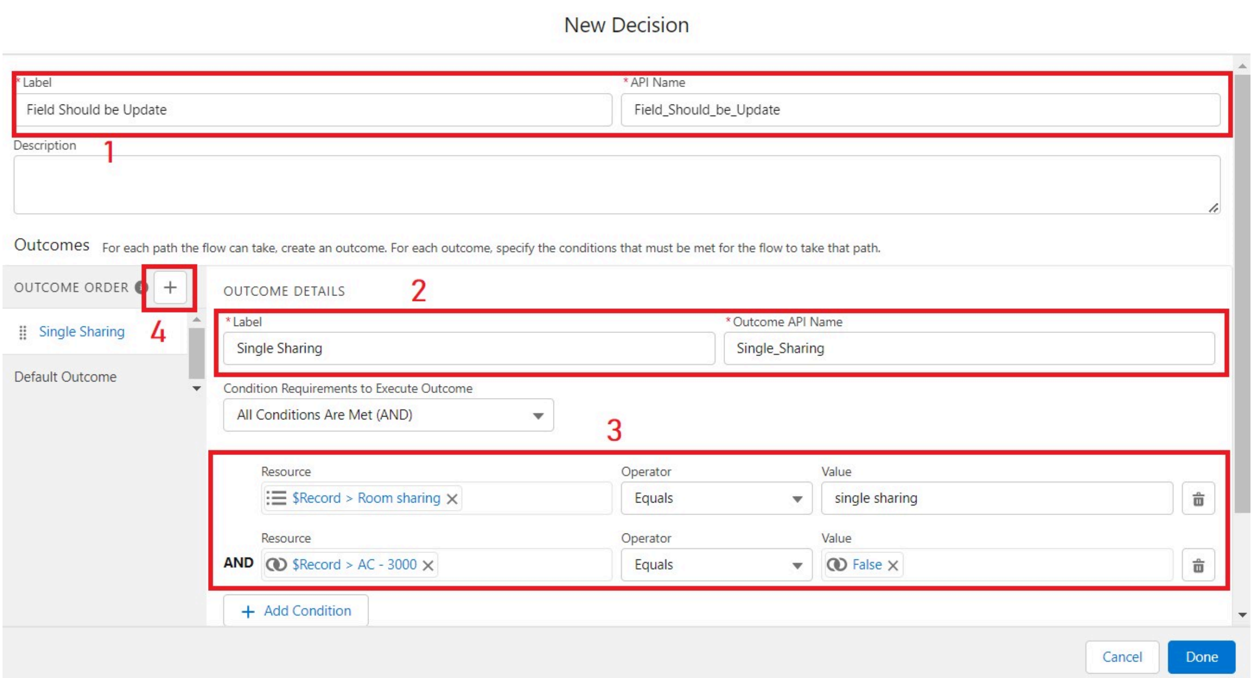
2.Select the Record-triggered flow and Click on Create.



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.

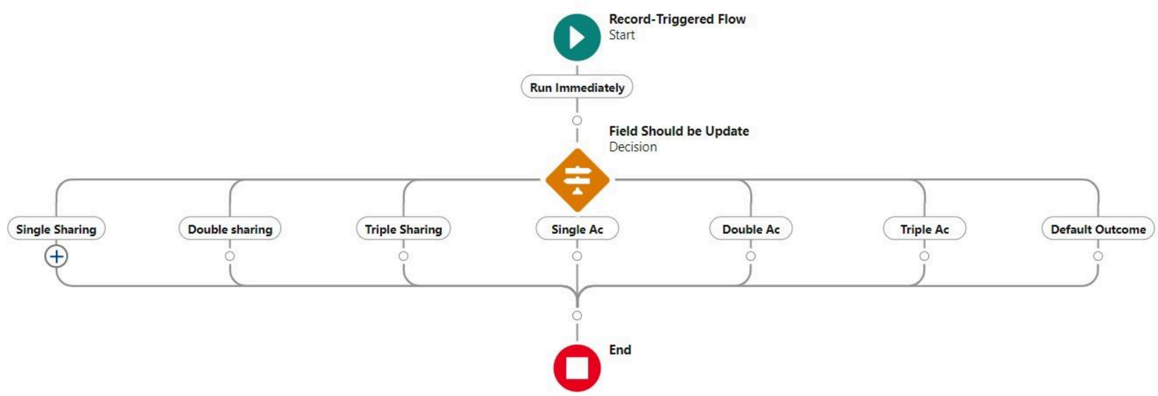
12.Enter the Outcome Details Label: Double Ac, Outcome API name: Gets Automatically Generated.

- 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.

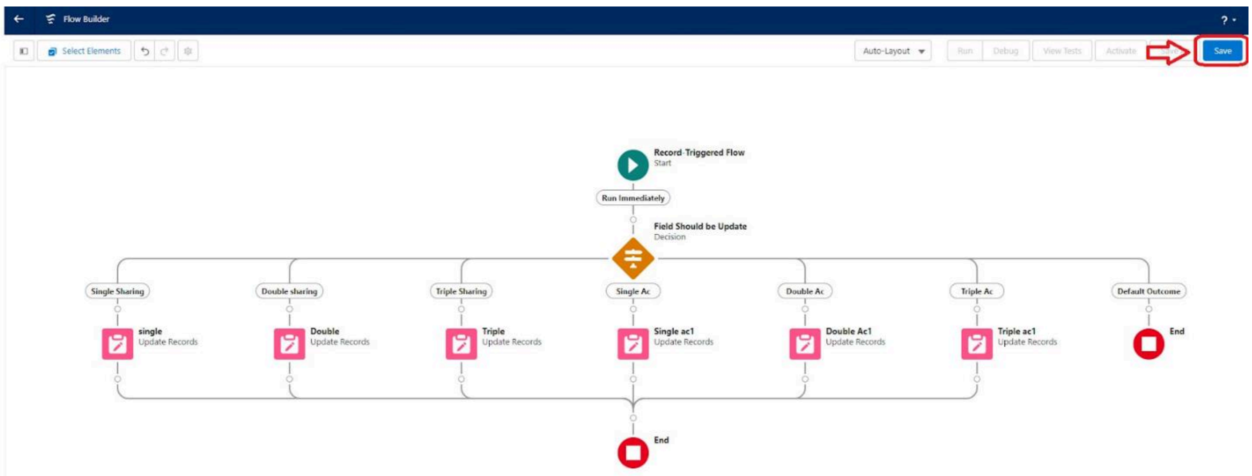
19.Enter the update records details

• 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.
• Click on Done.

21.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.

Conclusion:

The CRM application for managing bookings in your co-living space is an essential tool to
streamline and enhance the customer experience. It will allow you to efficiently manage and store customer details, enabling residents to easily choose from different air-conditioned rooms with multiple sharing options. The platform will also enable users to select special food items on a daily basis, catering to their individual preferences. Additionally, the application will support multiple payment modes, ensuring flexibility and convenience for residents.
Moreover, the feedback feature will empower residents to provide insights into the quality of services, such as room cleaning, internet connectivity, and food services, which will help maintain and improve service standards. Overall, this CRM system will not only foster a seamless living experience but also reinforce the values of

collaboration, comfort, and community that are at the core of the co-living concept. By balancing privacy and communal living, the application will support the creation of a vibrant and inclusive environment, allowing individuals to connect, thrive, and enhance their quality of life.