

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.

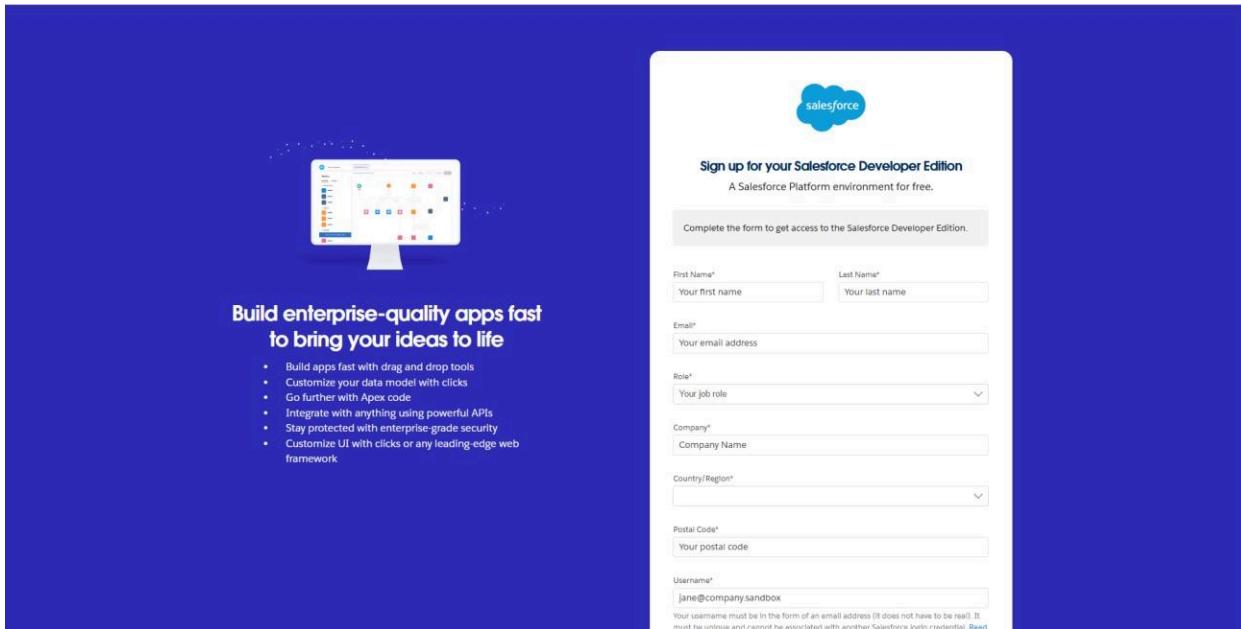
Milestone 1 - Introduction to Salesforce:

What is Salesforce?

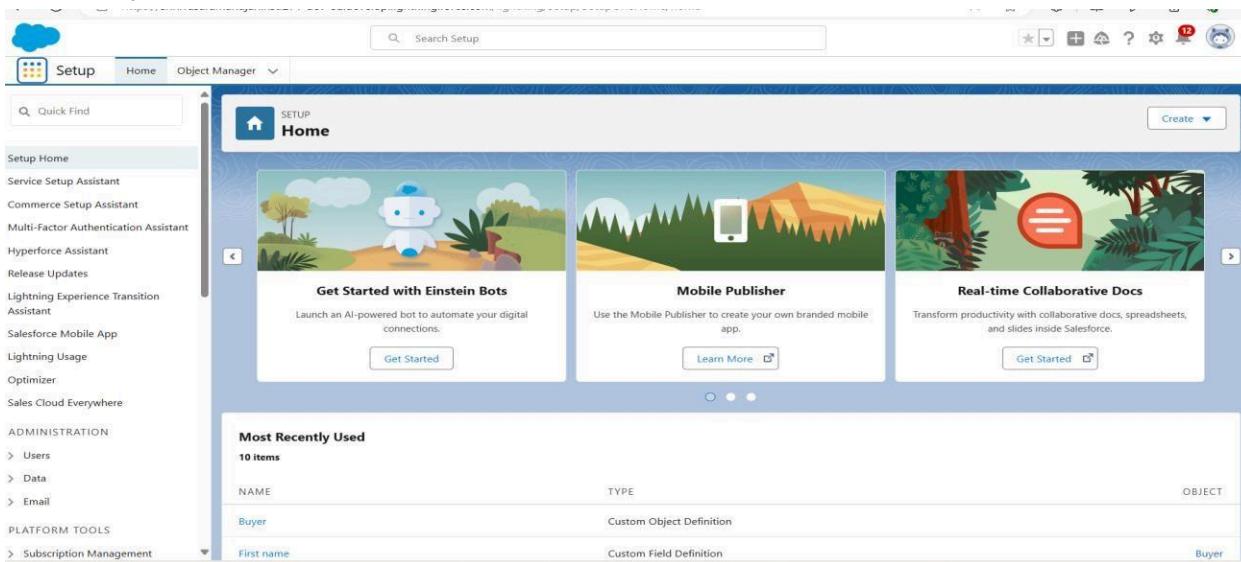
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate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

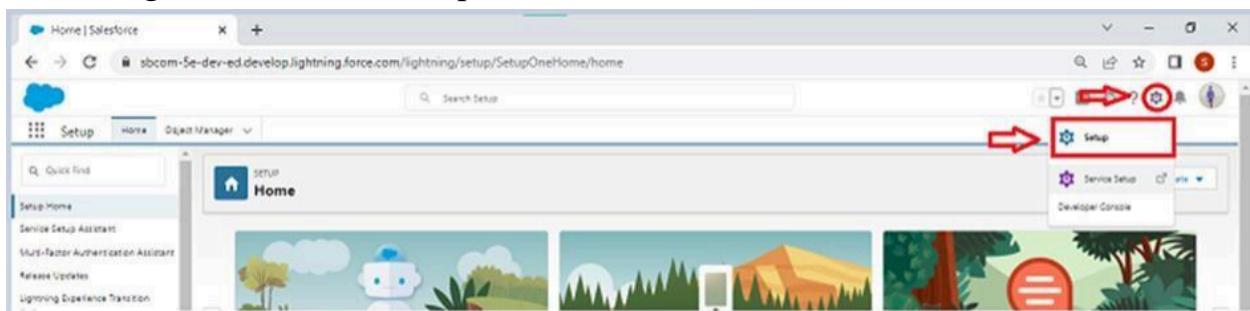
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

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.



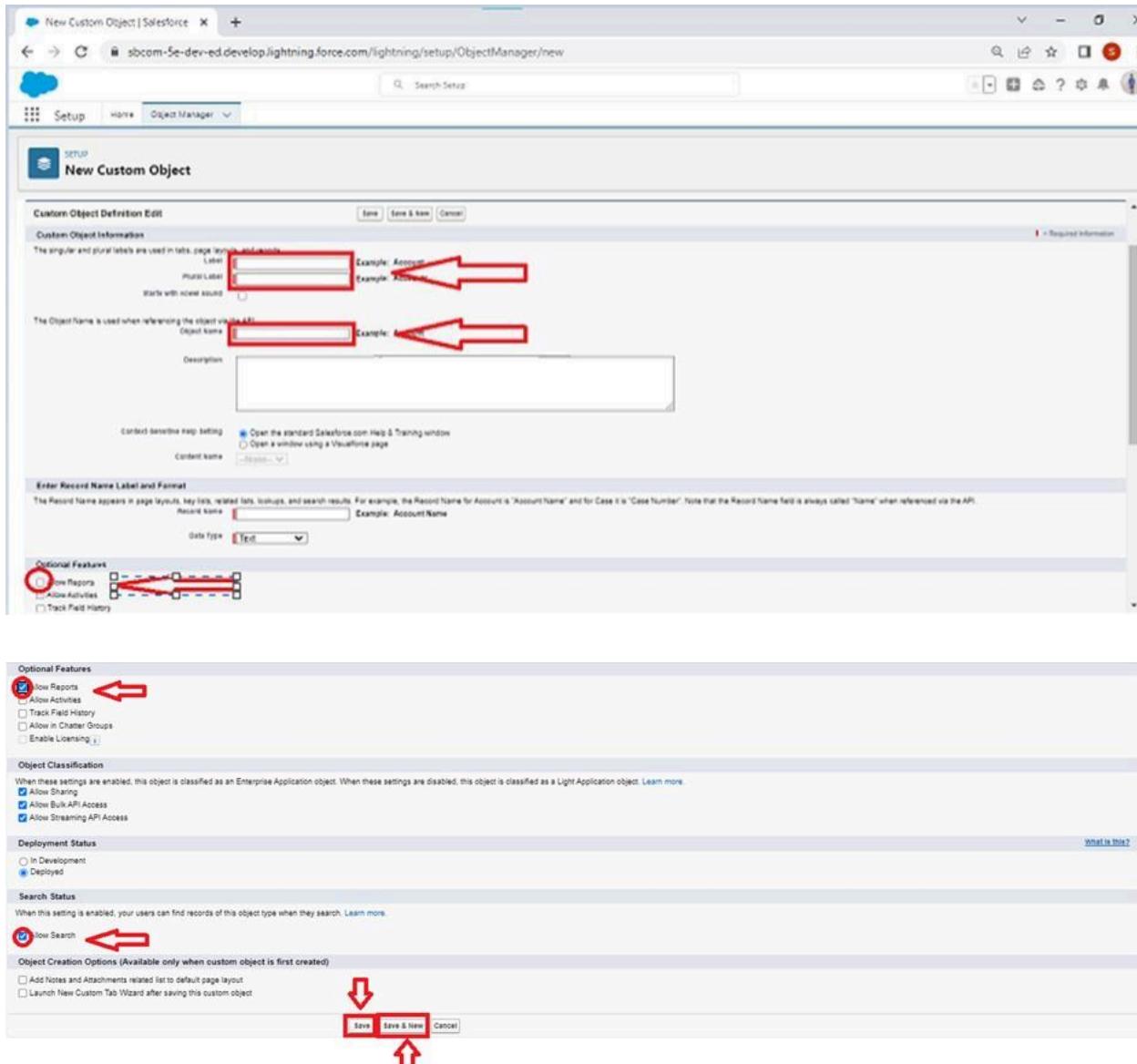
To create an object:

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.

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, name layouts, and reports.

Label	Total Room	Example: Account	1
Plural Label	Total Rooms	Example: Accounts	

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name	Total_Rooms	Example: Account	2
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Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, list views, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Total No Of Rooms	Example: Account Name	3
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Data Type

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

Optional Features

- Allow Reports ←
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing [Learn more](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search ←

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

Save **Save & New** **Cancel**

Create a custom object for Customer

The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER". A sidebar on the left lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled "Customer1" and displays its "Details". The "Description" field is empty. The "API Name" field is set to "Customer1__c". Under the "Custom" section, the "Singular Label" is "Customer1" and the "Plural Label" is "Customers". On the right, there are checkboxes for "Enable Reports" (checked), "Track Activities" (unchecked), "Track Field History" (checked), "Deployment Status" (set to "Deployed"), and "Help Settings" (set to "Standard salesforce.com Help Window"). At the bottom right are "Edit" and "Delete" buttons.

Create a custom object for Room Booking

The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER". The sidebar on the left is identical to the previous screenshot. The main content area is titled "Room Booking" and displays its "Details". The "Description" field is empty. The "API Name" field is set to "Room_Booking__c". Under the "Custom" section, the "Singular Label" is "Room Booking" and the "Plural Label" is "Room Bookings". On the right, there are checkboxes for "Enable Reports" (checked), "Track Activities" (unchecked), "Track Field History" (checked), "Deployment Status" (set to "Deployed"), and "Help Settings" (set to "Standard salesforce.com Help Window"). At the bottom right are "Edit" and "Delete" buttons.

Create a custom object for Payment

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Payment1' is being created. The 'Details' tab is selected, showing the following configuration:

- Description:** (empty)
- API Name:** Payment1_c
- Custom:** Custom
- Singular Label:** Payment1
- Plural Label:** Payments

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

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

On the left sidebar, other object creation options are listed:

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Create a custom object for Food Selection

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

- Description:** (empty)
- API Name:** Food_Selection_c
- Custom:** Custom
- Singular Label:** Food Selection
- Plural Label:** Food Selections

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

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

On the left sidebar, other object creation options are listed:

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Create a custom object for Feedback

The screenshot shows the Salesforce Setup interface with the following details:

- Setup > Object Manager**
- Feedback** object selected.
- Details Tab** is active.
- Fields & Relationships** sidebar.
- Details Panel:**
 - Description: [empty]
 - API Name: **Feedback__c**
 - Custom: ✓
 - Singular Label: **Feedback**
 - Plural Label: **Feedbacks**
 - Enable Reports: ✓
 - Track Activities: ✓
 - Track Field History: ✓
 - Deployment Status: **Deployed**
 - Help Settings: Standard salesforce.com Help Window
- Buttons:** Edit, Delete.

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)

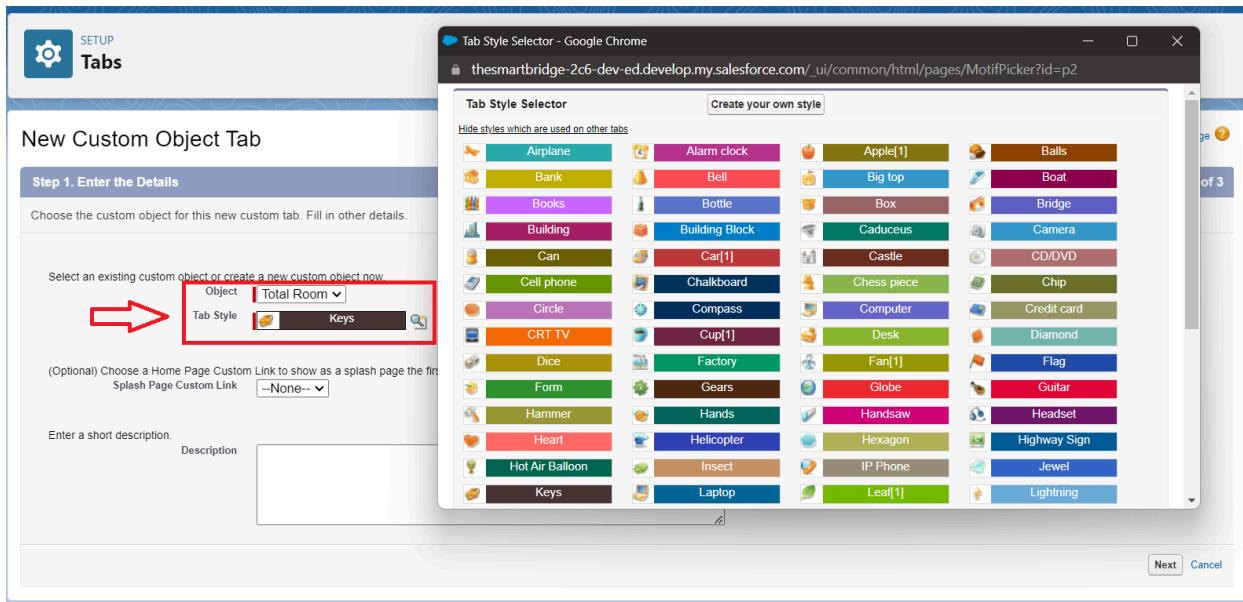
1. Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)

The screenshot shows the Salesforce Setup interface for creating a new Custom Object Tab:

- Setup** tab selected in the top navigation.
- Quick Find Bar** contains "Tabs".
- Search Bar** contains "Tabs".
- Custom Tabs** section is selected.
- New** button is highlighted with a red arrow.
- Custom Object Tab** table:

Action	Label	Tab Style	Description
Edit / Del	Activities	Blank	Created to setup with instant activity junction object
Edit / Del	Bookmarks	Anytime	
Edit / Del	Careers	Check point	
Edit / Del	Classes	Joined	
Edit / Del	Events	Anytime	
Edit / Del	Files	Phone	This tab is related to Hotel Reservation App
Edit / Del	Color Details	Comment	
Edit / Del	Codes	Blank	
Edit / Del	Education	Computer	
Edit / Del	Facilities	Blank	
Edit / Del	Reservations	Highway Sign	This tab is related to Hotel Reservation App
Edit / Del	Rooms	Highway Sign	This tab is related to Hotel Reservation App
Edit / Del	Software	Anytime	

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.

The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'app manager' typed in. Below it, a section titled 'Lightning Experience App Manager' contains a 'Clone Apps(Beta)' button and a 'New Lightning App' button. A red arrow points to each of these three buttons. The main area displays a list of 35 apps, with columns for App Name, Developer Name, Description, Last Modified, App Type, and Version.

App Name	Developer Name	Description	Last Modified	App Type	Ver.
1 All Tabs	Altfield	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	
2 Analytics Studio	Insights		04/12/2022, 10:13 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	✓
4 B2B Solutions	LightningB2B	Discover and manage business solutions designed for your industry.	04/12/2022, 10:16 am	Lightning	✓
5 Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	29/12/2022, 4:04 pm	Connected (Managed)	
6 Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed...	29/12/2022, 4:05 pm	Connected (Managed)	
7 College Management System	Naiven	demo app	08/12/2022, 4:18 pm	Lightning	✓
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:12 am	Classic	✓
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning	✓

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

This screenshot shows the 'New Lightning App' configuration page. It has two main sections: 'App Details' and 'App Branding'. In the 'App Details' section, the 'App Name' field is highlighted with a red arrow and contains the placeholder 'Name your app...'. In the 'App Branding' section, the 'Primary Color Hex Value' field is highlighted with a red arrow and contains the value '#0070D2'. At the bottom right, a large red arrow points to the 'Next' button.

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.

App Settings

Navigation Items **1**

Available Items **2**

Selected Items **4**

User Profiles

4. To Add User Profiles:

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles **1**

Selected Profiles **3**

No Profiles selected

Save & Finish **2**

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

The screenshot shows the Salesforce Object Manager interface. At the top, the object name 'Customer1' is selected in the search bar. On the left, the 'Fields & Relationships' tab is selected. In the center, a table lists existing fields for 'Customer1'. At the top right of the table, there is a 'New' button highlighted with a red arrow. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

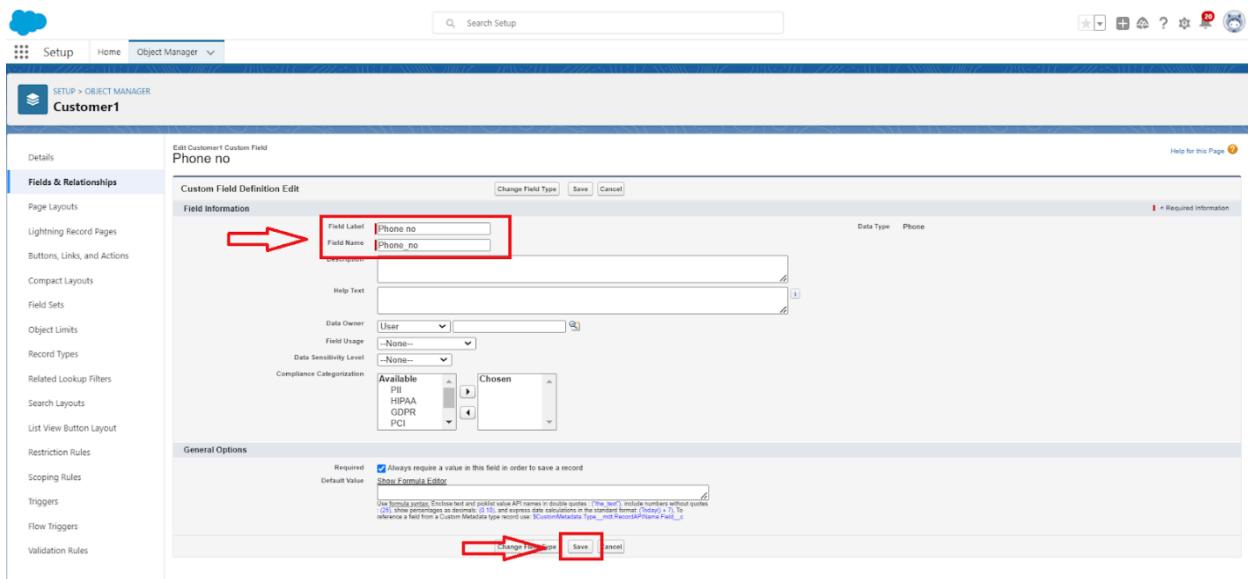
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
current Status	current_Status__c	Picklist		
Customer Name	Name	Text(80)		✓
Email id	Email_id_c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Permanent Address	Permanent_Address__c	Text Area(255)		
Phone no	Phone_no__c	Phone		

3. Select Data Type as a “Phone”

The screenshot shows the 'Fields & Relationships' section of the Object Manager for 'Customer1'. On the left, the 'Fields & Relationships' tab is selected. On the right, a list of data types is shown, with 'Phone' selected and highlighted with a red arrow. A detailed description of the 'Phone' data type is visible on the right side of the screen.

Phone
Allows users to enter any phone number. Automatically formats it as a phone number.

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 Next16 | P a g e
4. Fill the Above as following:

Field Label: Current Status

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

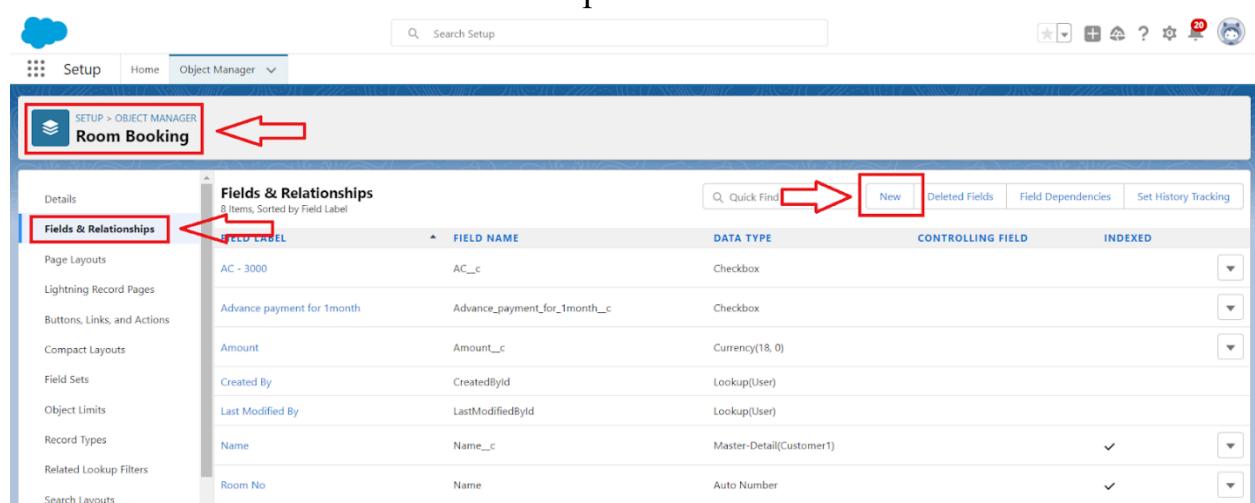
- Student
- Employee
- Others

- 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



The screenshot shows the Salesforce Setup interface. At the top, there is a navigation bar with 'Setup' and 'Object Manager'. Below it, the 'Room Booking' object is selected in the 'Object Manager' section. A red arrow points to the 'Room Booking' label. On the left, a sidebar lists various object management options like 'Page Layouts', 'Lightning Record Pages', etc. The main area is titled 'Fields & Relationships' with a sub-section 'FIELD LABEL'. A red arrow points to the 'FIELDS & RELATIONSHIPS' tab. Another red arrow points to the 'New' button at the top right of the table. The table lists several fields with their details: AC - 3000 (Field Label), AC__c (Field Name), Checkbox (Data Type); Advance payment for 1month (Field Label), Advance_payment_for_1month_c (Field Name), Checkbox (Data Type); Amount (Field Label), Amount__c (Field Name), Currency(18, 0) (Data Type); Created By (Field Label), CreatedById (Field Name), Lookup(User) (Data Type); Last Modified By (Field Label), LastModifiedById (Field Name), Lookup(User) (Data Type); Name (Field Label), Name__c (Field Name), Master-Detail(Customer1) (Data Type); Room No (Field Label), Name (Field Name), Auto Number (Data Type). The 'CONTROLLING FIELD' and 'INDEXED' columns are also visible.

3. Select Data Type as a “Picklist”

4. Click on Next

SETUP > OBJECT MANAGER
Room Booking

Step 2. Enter the details

Field Label: Room Sharing (1)

Values: Use global picklist value set Enter values, with each value separated by a new line (2)

Single sharing
Double sharing
Triple sharing

Required (3)

Field Name: Room_Sharing
Description:
Help Text:

Auto add to custom report type: Add this field to existing custom report types that contain this entry (3)

Default Value: Show Formula Editor

SETUP > OBJECT MANAGER
Room Booking

Step 2. Enter the details

Field Label: Room Sharing (1)

Values: Use global picklist value set Enter values, with each value separated by a new line (2)

Single sharing
Double sharing
Triple sharing

Required (3)

Field Name: Room_Sharing
Description:
Help Text:

Auto add to custom report type: Add this field to existing custom report types that contain this entry (3)

Default Value: Show Formula Editor

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.

The screenshot shows the Salesforce Object Manager interface. At the top left, there's a blue cloud icon, followed by 'Setup' and 'Object Manager'. A red box highlights the 'Object Manager' tab. Below it, a table lists various objects: Resource Absence, Resource Preference, Return Order, etc. The 'Room Booking' row is highlighted with a red box. To its right, the object name 'Room_Booking__c' and 'Custom Object' are displayed. A date field '07/06/2023' with a dropdown arrow is also visible. Red arrows point from the left towards the 'Object Manager' tab and from the right towards the date field.

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

The screenshot shows the 'Fields & Relationships' page for the 'Room Booking' object. At the top left, there's a blue cloud icon, followed by 'Setup', 'Object Manager', and 'Room Booking'. A red box highlights the 'Room Booking' object name. On the left, a sidebar lists options like Details, Fields & Relationships (which is selected and highlighted with a red box), Page Layouts, Lightning Record Pages, etc. The main area shows a table titled 'Fields & Relationships' with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Several fields are listed, including 'AC - 3000', 'Advance payment for 1month', 'Amount', 'Created By', 'Last Modified By', 'Name', and 'Room No'. At the top right, there's a 'Quick Find' search bar and a 'New' button, which is highlighted with a red box. Red arrows point from the left towards the 'Fields & Relationships' tab and from the right towards the 'New' button.

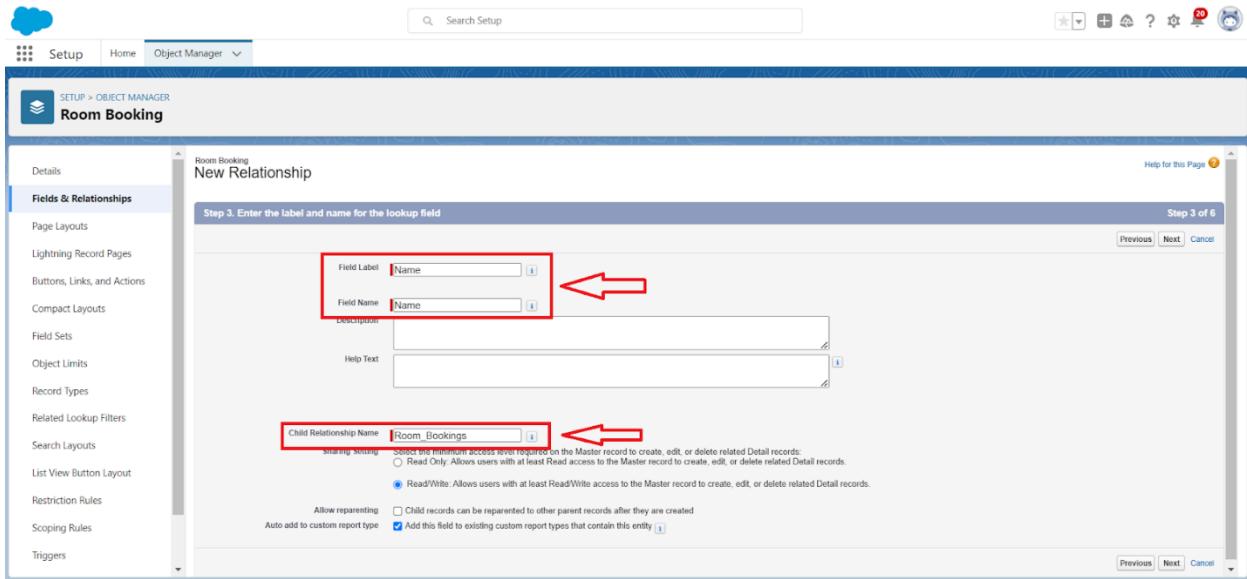
3. Select Data Type as a “Master-detail Relationship”

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

The screenshot shows the 'Step 3. Define the summary calculation' page. At the top, it says 'Total Room New Custom Field'. Below that, it says 'Step 3 of 5'. There are 'Previous', 'Next', and 'Cancel' buttons. A red box highlights the 'Summarized Object' dropdown, which is set to 'Room Bookings'. Another red box highlights the 'Select Roll-Up Type' section, where the 'COUNT' radio button is selected. There are also 'SUM', 'MIN', and 'MAX' options. A 'Field to Aggregate' dropdown is set to 'None'. At the bottom, there's a 'Filter Criteria' section with two radio button options: 'All records should be included in the calculation' (selected) and 'Only records meeting certain criteria should be included in the calculation'.

Click on Next > Next > Save and new

8. To create fields in an object:

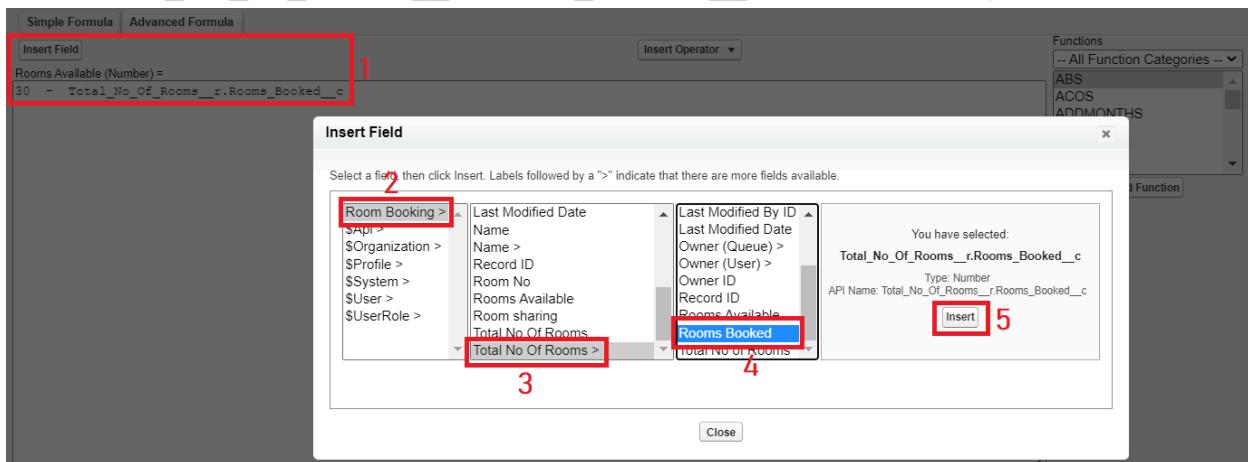
Select Data Type as a “Formula”

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”

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various system icons. The main content area is titled 'Payment1' under 'FIELDS & RELATIONSHIPS'. The left sidebar lists various configuration options like Details, Page Layouts, and Triggers. The main table displays field information with columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. A 'New' button is located at the top right of the table and also in the top right corner of the page header.

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

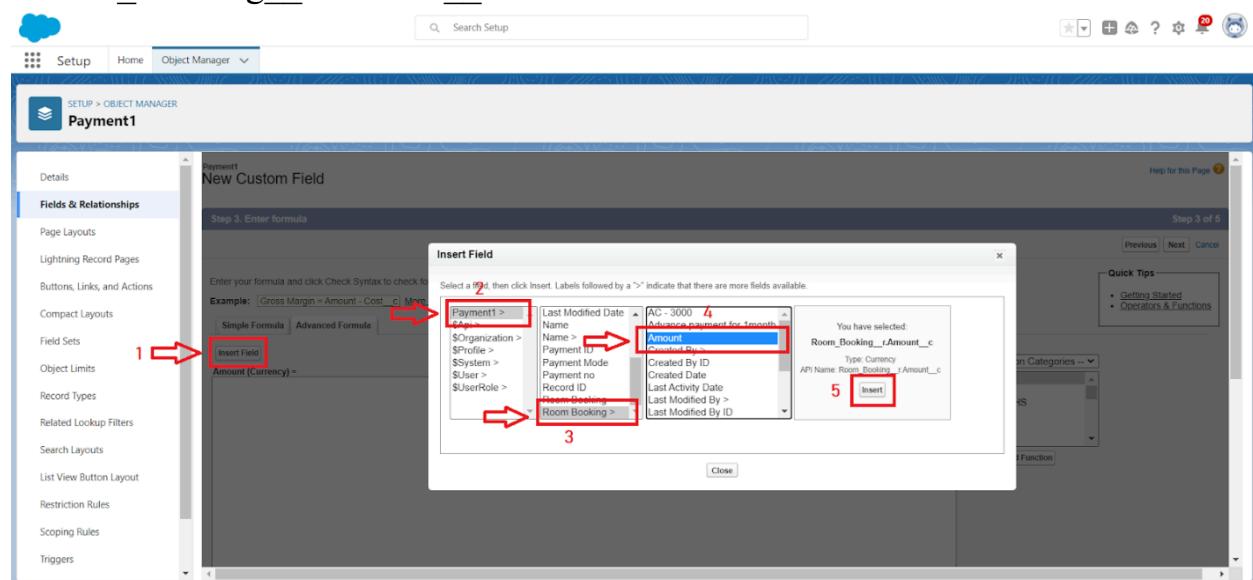
- Click on Next > Next > Save and new

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:

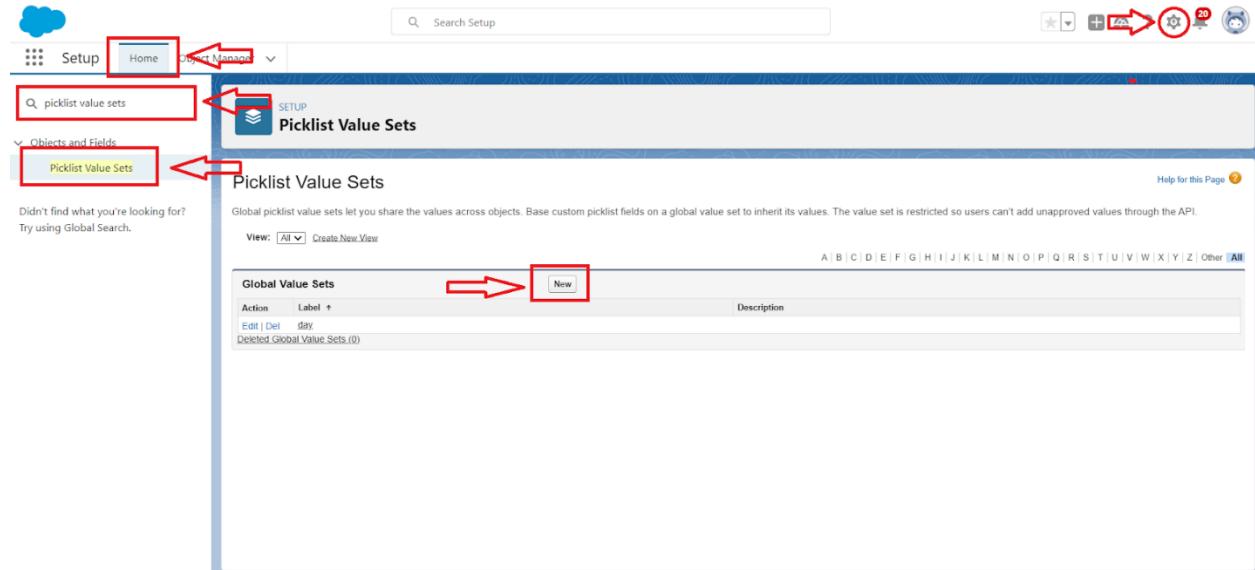
Select Data Type as a "Master-detail Relationship"

Fill the Above as following:

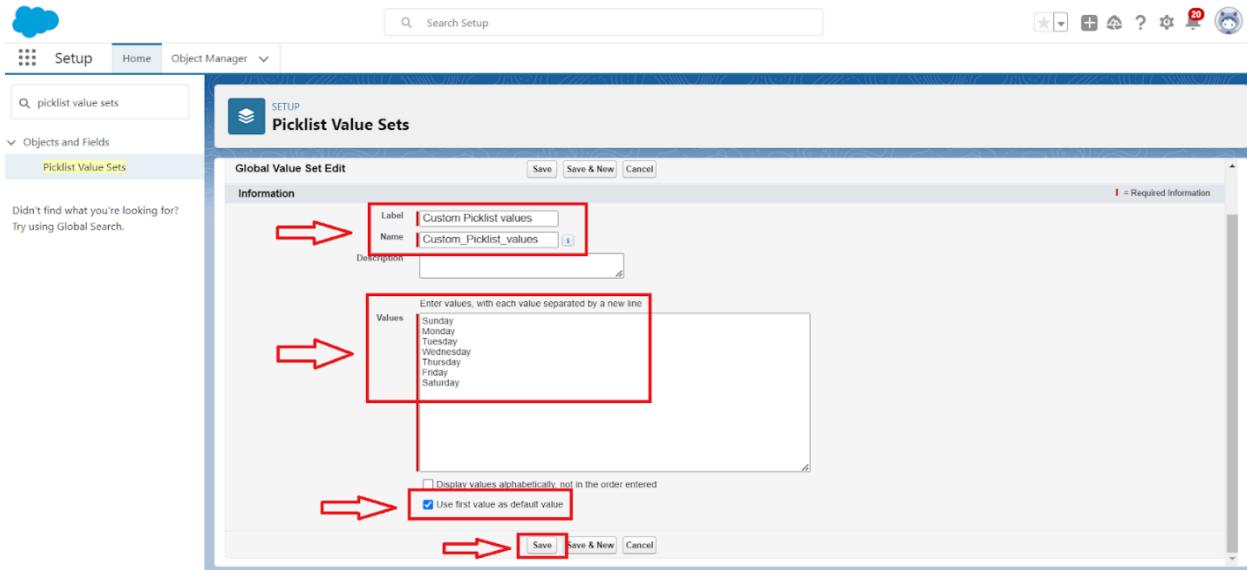
- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

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.

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' button in the top left corner. Another red box highlights the 'Food Selection' row in the main list, which is also selected in the sidebar. A red arrow points from the 'Food Selection' label to the selection indicator in the sidebar.

Object Name	Object Label	Type	Last Modified
Entitlement Contact	EntitlementContact	Standard Object	07/06/2023
Event	Event	Standard Object	
Feedback	Feedback_c	Custom Object	
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object	
Finance Transaction	FinanceTransaction	Standard Object	
Food Selection	Food_Selection__c	Custom Object	05/06/2023
Image	Image	Standard Object	
Incident	Incident	Standard Object	
Incident Related Item	IncidentRelatedItem	Standard Object	
Individual	Individual	Standard Object	
Invoice	Invoice	Standard Object	
Invoice Line	InvoiceLine	Standard Object	
Lead	Lead	Standard Object	

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

The screenshot shows the 'Fields & Relationships' section of the Food Selection object. A red box highlights the 'Food Selection' label in the top left. Another red box highlights the 'Fields & Relationships' link in the sidebar. A red arrow points from the 'Field Dependencies' button in the top right to the 'New' button, indicating they are related.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Breakfast	Breakfast__c	Picklist		
Created By	CreatedById	Lookup(User)		
Dinner	Dinner__c	Picklist		
Food Selection No	Name	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Lunch	Lunch__c	Picklist		
Name	Name__c	Master-Detail(Customer1)		
Select Breakfast	Select_Breakfast__c	Picklist	Breakfast	
Select dinner	Select_dinner__c	Picklist	Dinner	

3. Now Click on New Option

Food Selection Field Dependencies

This page allows you to define dependencies between fields (e.g., dependent picklists).

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Breakfast	Select Breakfast	Veera Venkata Varaprasad Androthu 07/06/2023, 3:45 pm
Edit Del	Dinner	Select dinner	Veera Venkata Varaprasad Androthu 07/06/2023, 3:55 pm
Edit Del	Lunch	Select Lunch	Veera Venkata Varaprasad Androthu 07/06/2023, 3:56 pm

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

New Field Dependency

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.

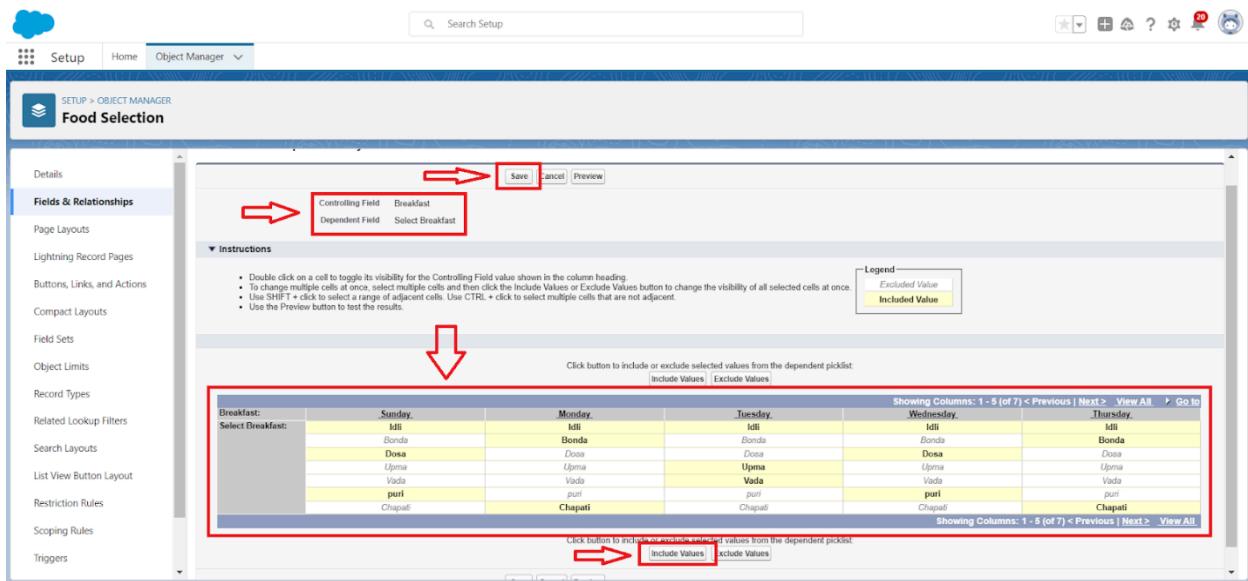
- The field that drives filtering is called the "controlling field" – Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.
- The field that has its values filtered is called the "dependent field". Custom picklists and multi-select picklists can be dependent fields.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

Controlling Field: Breakfast
Dependent Field: Select Breakfast

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 Dinner37 | P a g e
 - 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

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback No	Name	Auto Number		✓
Food	Food__c	Picklist		
Housecleaning	Housecleaning__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer1)		✓
Owner	OwnerId	Lookup(User/Group)		✓
Suggestion	Suggestion__c	Text Area(255)		

Data Type

- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Text

Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

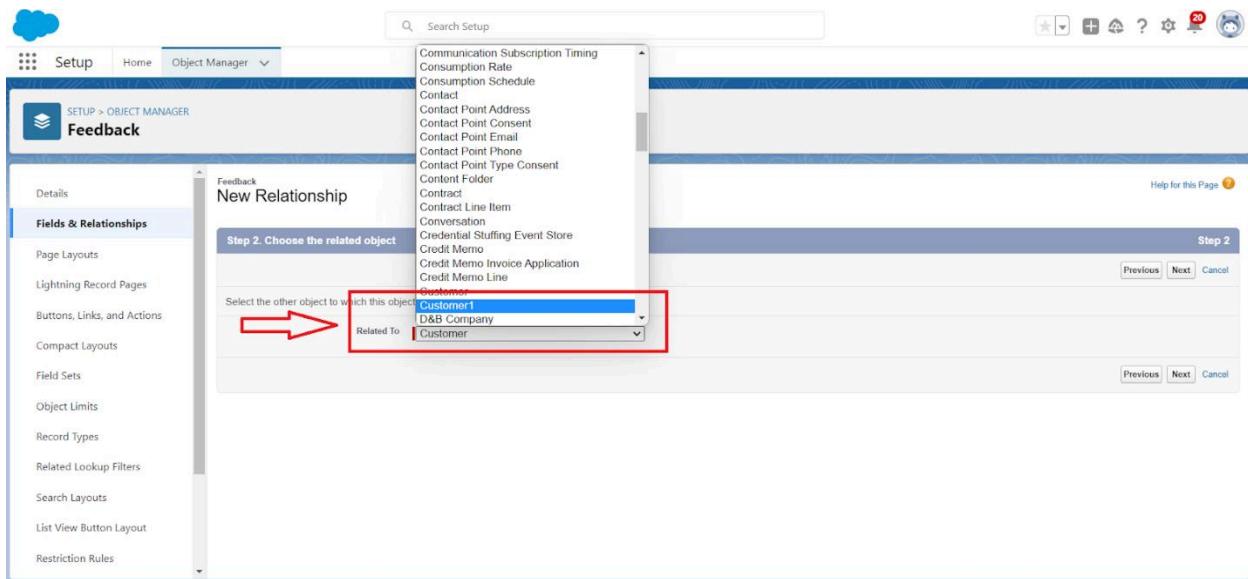
Checkbox

Allows users to select a True (checked) or False (unchecked) value.

Text

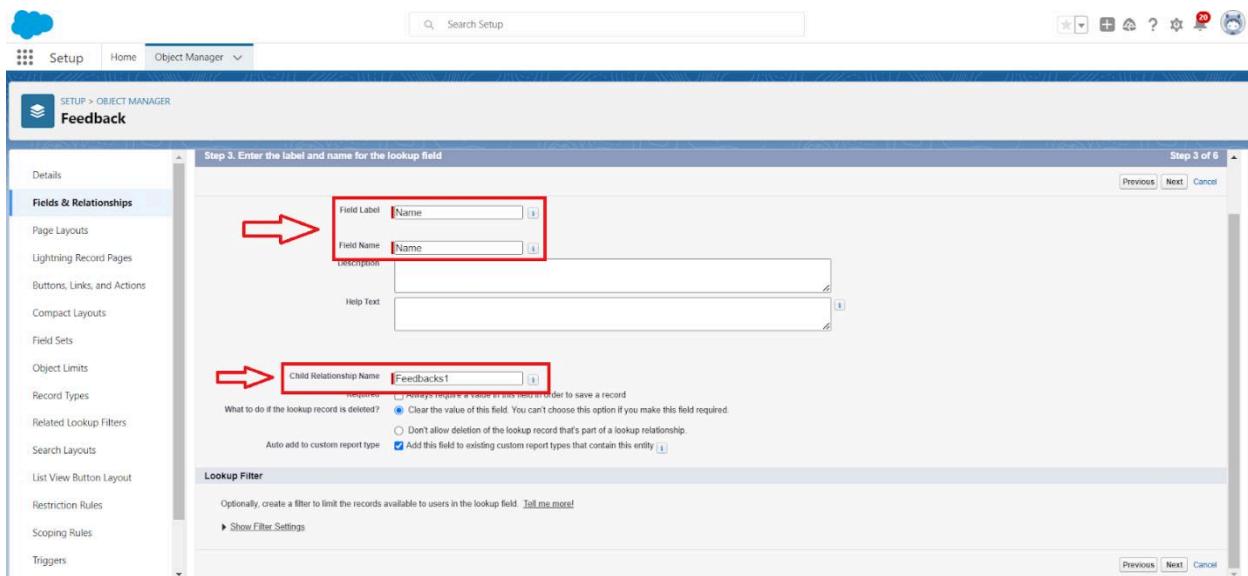
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

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 line
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

SETUP > OBJECT MANAGER
Total Room

Fields & Relationships 1

New 2

CONTROLLING FIELD INDEXED

FIELD LABEL	FIELD NAME	DATA TYPE
count	count_c	Roll-Up Summary (COUNT Room Booking)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)

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

SETUP > OBJECT MANAGER
Total Room

Fields & Relationships

Step 1

Next Cancel

Total Room New Custom Field

Specify the type of information that the custom field will contain.

Data Type

Formula 3

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.

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

SETUP > OBJECT MANAGER
Total Room

Details

Fields & Relationships

Field Label: Rooms Available 4

Field Name: Rooms_Available

Formula Return Type

Number 5

Calculate a numeric value.
Example: `(TODAY() - CloseDate)`

Percent

Calculate a percent and automatically add the percent sign to the number.
Example: `(Discount * (Amount - Discounted_Amount_c)) / Amount`

Text

Create a text string, for example, by concatenating other text fields.
Example: `'Full Name = LastName & ,& FirstName'`

Time

Calculate a time, for example, by adding a number of hours to another time.
Example: `[Next = TIMEVALUE(NOW()) + 1]`

Options

Decimal Places: 0 Example: 999 6

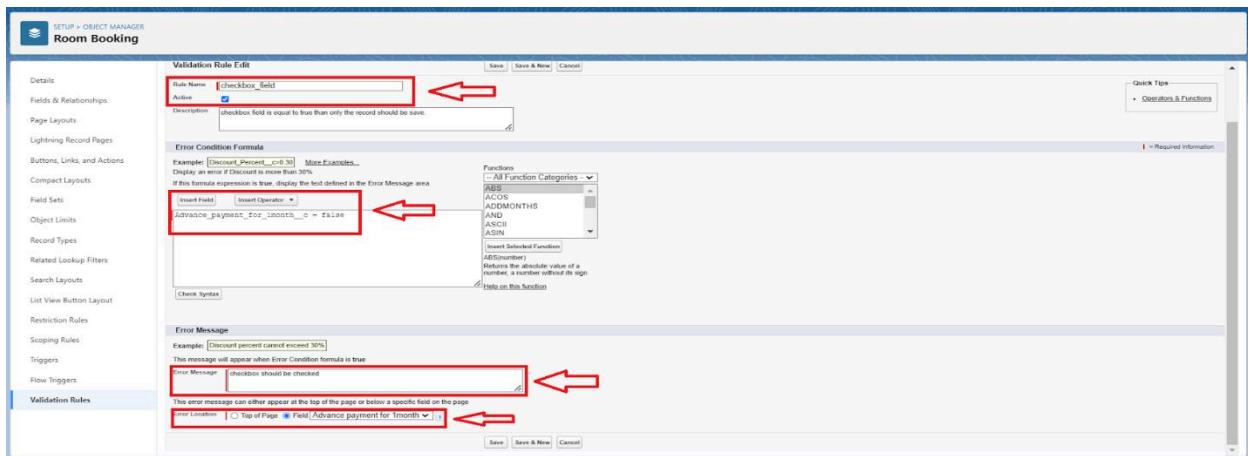
Previous Next Cancel

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)

The screenshot shows the 'Rule Definition' page in Salesforce. Step 1 highlights the 'Rule Name' field ('check_in_rule') and the 'Active' checkbox. Step 2 highlights the formula editor where the formula 'Check_In__c = False' is being typed. Step 3 highlights the 'Error Message' section with the message 'Check box should be checked'. Step 4 highlights the 'Error Location' dropdown set to 'Field'.

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.

The screenshot shows the 'Clone Profile' page in Salesforce. Step 1 highlights the 'Profile Name' field containing 'Custom user'. Step 2 highlights the 'Save' button.

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.

Custom Object Permissions:

Object	Basic Access	Create	Edit	Delete	View All	Data Administration
Customers	<input checked="" type="checkbox"/>					
Feedbacks	<input checked="" type="checkbox"/>					
Food Selections	<input checked="" type="checkbox"/>					
Payments	<input checked="" type="checkbox"/>					
Room Bookings	<input checked="" type="checkbox"/>					
Total Rooms	<input checked="" type="checkbox"/>					

Session Settings:

- Session Times Out After: 8 hours of inactivity
- Session Security Level Required at Login: --None--

Password Policies:

- User passwords expire in: Never expires
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obscure secret answer for password resets:
- Require a minimum 1 day password lifetime:

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.

Custom Object Permissions:

Object	Basic Access	Create	Edit	Delete	View All	Data Administration
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Feedbacks	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Food Selections	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Room Bookings	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Total Rooms	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Session Settings:

- Session Times Out After: 2 hours of inactivity
- Session Security Level Required at Login: --None--

Password Policies:

- User passwords expire in: Never expires
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obscure secret answer for password resets:
- Require a minimum 1 day password lifetime:

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.

The screenshot shows the 'Edit Profile' page in Salesforce Setup. At the top, there are two sections of object permissions, each with a red box highlighting specific objects. Red arrows point from the text above to these boxes.

Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedbacks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food Selections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Room Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total Rooms	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Below the tables are 'Session Settings' and 'Password Policies' sections.

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.

The screenshot shows the 'Your Organization's Role Hierarchy' page. It displays a tree structure of roles under 'Nick Enterprises'. A red box highlights the 'Add Role' button under the 'CEO' node.

Your Organization's Role Hierarchy

Collapse All | Expand All

- Nick Enterprises
 - Add Role
 - CEO [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - HR [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Manager [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - On Site Emp [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Remote Emp [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

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

Role Edit
New Role

Role Edit

Label Marketing

Role Name Marketing

This role reports to CEO

Role Name as displayed on reports

Save Save & New Cancel

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.

Role Edit
New Role

Role Edit

Label Receptionist

Role Name Receptionist

This role reports to CEO

Role Name as displayed on reports

Save Save & New Cancel

4. Then click on Save.

Users

Create User

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

The screenshot shows the Salesforce Setup interface under the 'Users' section. The sidebar on the left has 'Users' selected. The main area displays a grid of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. At the top right of the grid, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A red arrow points to the 'New User' button.

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

The screenshot shows the 'New User' creation page. The 'General Information' section on the left contains fields for First Name, Last Name, Alias, Email, Username, and Nickname, all of which are highlighted with a red box and an arrow pointing to them. The 'Role, User License, Profile, Active' section on the right contains dropdowns for Role (CEO), User License (Salesforce), Profile (Custom user), and Active status, also highlighted with a red box and an arrow pointing to them.

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

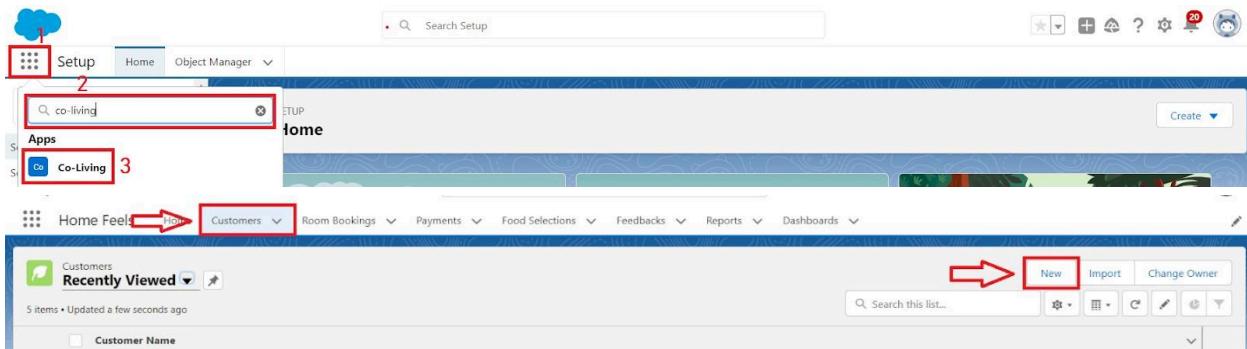
3.Save

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.

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

Delete a Record (Customers)

1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on the Customers Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

Reports

Create Report

1. Go to the app > click on the reports tab
2. Click New Report.

The screenshot shows the 'Reports' section of a software interface. At the top, there's a navigation bar with tabs like Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is currently selected), and Dashboards. Below the navigation bar, there's a search bar labeled 'Search recent reports...' and a red box labeled '3' pointing to a 'New Report' button. On the left, there's a sidebar with categories: REPORTS, Recent, Created by Me, Private Reports, Public Reports, and All Reports. The 'Recent' section lists three reports: 'Room booking report' (custom report, created by Veera Venkata Varaprasad Androthu on 14/6/2023, 2:58 pm), 'Room booking report' (Private Reports, created by Veera Venkata Varaprasad Androthu on 7/6/2023, 4:53 pm), and 'Sample Flow Report: Screen Flows' (Public Reports, created by Automated Process on 5/6/2023, 10:09 am).

3. Select report type from category or from report type panel or from search panel
“Customers with Room Bookings with Total Rooms ” > click on start report.
4. Customize your report
5. Add fields from left pane as shown below.

The screenshot shows the report customization interface for a 'Room booking report'. The top navigation bar includes 'REPORT' and 'Customer with Room Bookings with Payments'. The main area has a preview table with columns: Customer Name, Room No, Phone no, Email id, Permanent Address, current Status, Room sharing, Advance payment for 1month, AC - 3000, and Amount. A red arrow points to the 'Save' button at the top right. On the left, there's a 'Fields' panel with two sections: 'Outline' (containing 'Groups' and 'Customer Name') and 'Columns' (containing 'Room No', 'Phone no', 'Email id', 'Permanent Address', 'current Status', 'Room sharing', '# Advance payment for 1month', '# AC - 3000', and '# Amount'). Red arrows point to both the 'Groups' section in the Outline and the '# Amount' field in the Columns section.

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

The screenshot shows the Co-Living app's dashboard. At the top, there is a navigation bar with icons for Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Dashboards' tab is highlighted with a red box and the number '1'. Below the navigation bar is a search bar labeled 'Search...'. To the right of the search bar are several small icons. The main area is titled 'Dashboards' and has a sub-section 'Recent' with '2 items'. A table below lists 'DASHBOARDS' with columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A red box labeled '2' highlights the 'New Dashboard' button at the top right of the table.

2. Give a Name and click on Create.

3. Select add component.

4. Select a Report Customer with Room Booking and click on select.

This screenshot shows a 'Select Report' modal. On the left, there is a sidebar with sections for 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'Folders' (Created by Me, Shared with Me, All Folders), and a search bar. In the main area, a report titled 'Room booking report' by 'Veera Venkata Varaprasad Androthu' is listed. A red box highlights this report. At the bottom right of the modal, there is a 'Select' button with a red arrow pointing to it.

This screenshot shows the 'Edit Component' modal. On the left, there are input fields for 'Room booking report' (Title), 'Subtitle' (Amount), 'Footer', 'Legend Position' (Right), and 'Component Theme' (Dark selected). On the right, there is a 'Preview' section showing a funnel chart titled 'Room booking report' with the sum of amount as ₹156k. The chart has five segments: ₹28k, ₹20k, ₹34k, ₹44k, and ₹30k. To the right of the chart is a legend titled 'Customer Name' with entries: Abhilash (blue), Ganesh (blue), Prasad (purple), sandeep (purple), and suman (teal). Below the chart is a link 'View Report (Room booking report)'. At the bottom right of the modal, there is a 'Cancel' button and a large 'Update' button with a red arrow pointing to it.

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

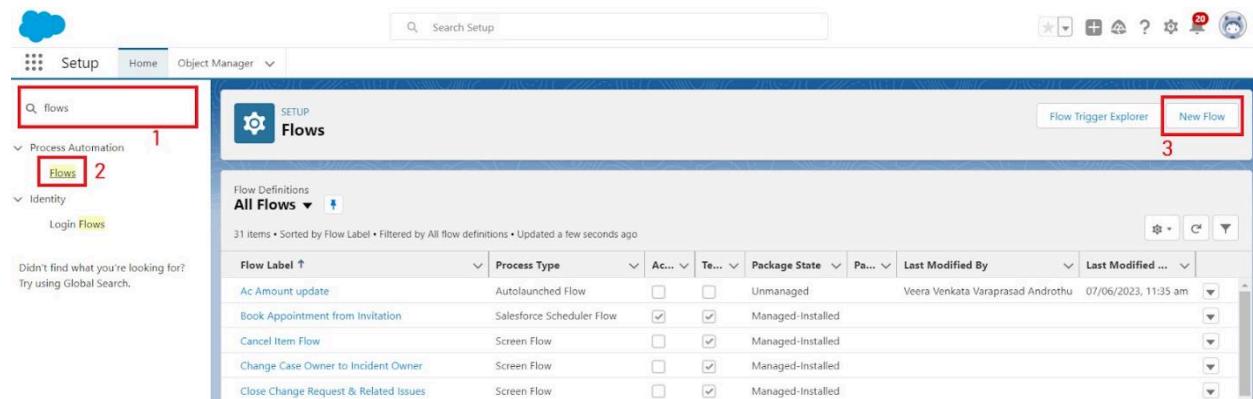
Create Another Dashboard

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.

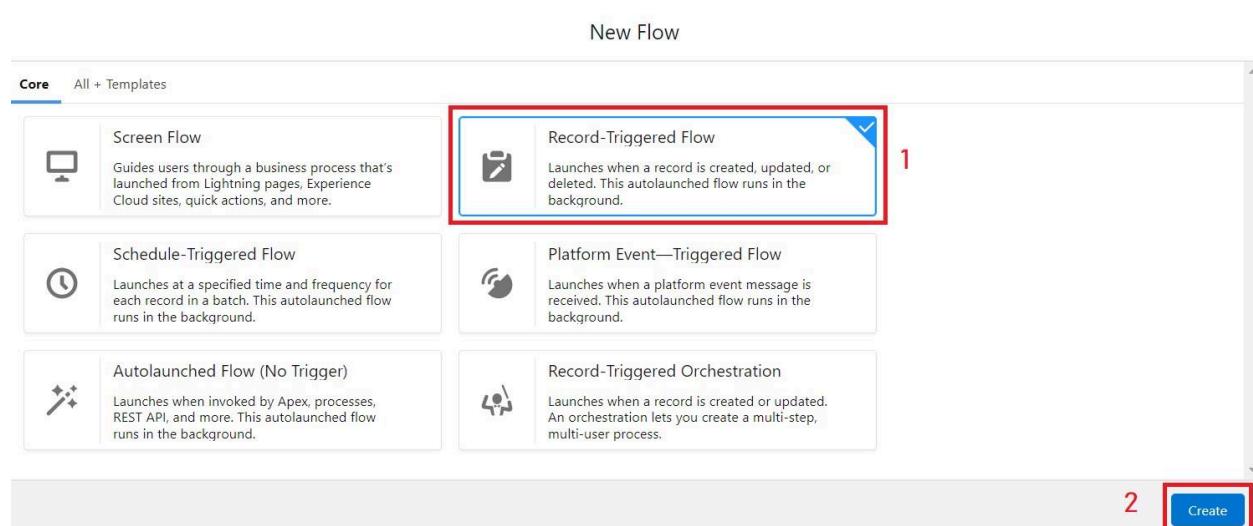
Flows

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.

New Decision

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS
1	*Label: Single Sharing *API Name: Single_Sharing
2	Condition Requirements to Execute Outcome: All Conditions Are Met (AND)
3	Resource: \$Record > Room sharing, Operator: Equals, Value: single sharing AND Resource: \$Record > AC - 3000, Operator: Equals, Value: False

Cancel **Done**

- 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.

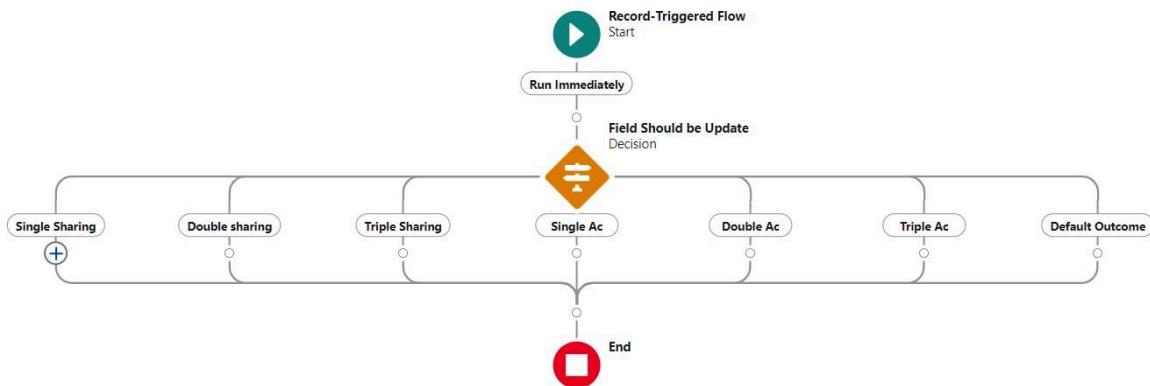
12.Enter the Outcome Details Label: Double Ac, Outcome API name: Gets Automatically Generated.

- 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.

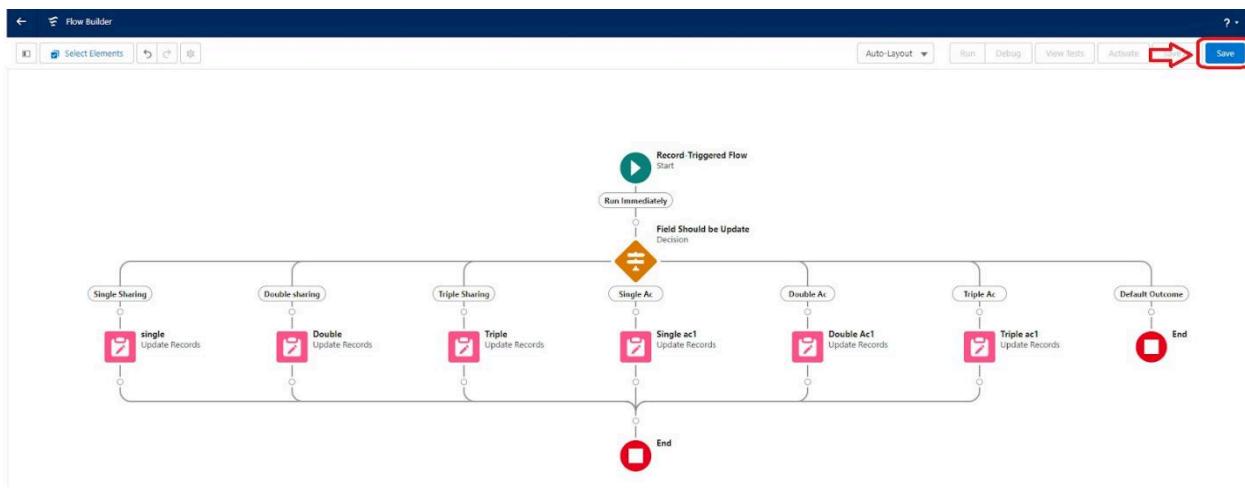
19.Enter the update records details

- 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.