

A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING

By

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ABSTRACT

The Co-Living Booking CRM Application is designed to streamline the management and booking processes for co-living spaces. This application integrates customer relationship management (CRM) functionalities with booking and property management features, offering a comprehensive solution for co-living operators. Key features include tenant management, booking and availability tracking, automated billing and payment processing, maintenance requests, and food selection. The application aims to enhance operational efficiency, improve tenant satisfaction, and provide real-time insights into property performance and occupancy rates. By leveraging modern web technologies and intuitive design, this CRM application simplifies the complexities of managing co-living spaces, making it an essential tool for property managers and owners.

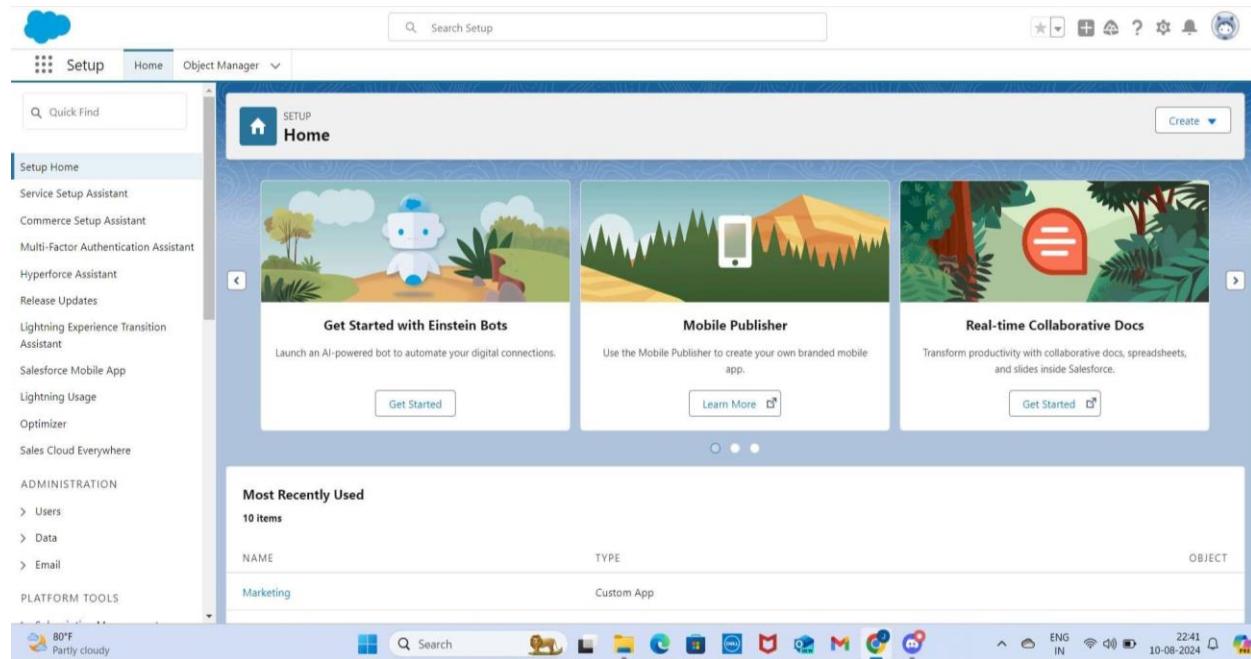
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TASK 1:CREATING DEVELOPER ACCOUNT

Creating a developer org in salesforce

- 1.Go to <https://developer.salesforce.com/signup>
- 2.On the sign up form,enter the deatils given.
- 3.Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
- 4.Click on Verify Account
5. Give a password and answer a security question and click on change password.
6. when you will redirect to your salesforce setup page as given in the below.



TASK 2:CREATING OBJECTS

What Is an Object?

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

Salesforce objects are of two types:

1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2.Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Steps to Create a Custom Object for Total Rooms:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Total Room "
4. Fill in the plural label as " Total Rooms "
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
11. Leave everything else as is, and click Save.

Note: Follow the same steps for creating custom objects like Customer,Room Booking, Payments,Food Selection and Feedback

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with icons for Home, Object Manager, and a search bar labeled "Search Setup". Below the navigation bar is a header titled "Object Manager" with a sub-header "1 Items. Sorted by Label". A search bar contains the text "total room". On the right side of the header are buttons for "Schema Builder" and "Create". The main content area displays a table with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Total Room	Total_Room__c	Custom Object		25/07/2024	✓

At the bottom of the window, there is a toolbar with various icons. The taskbar at the very bottom of the screen shows several pinned application icons, including Microsoft Word, Excel, File Explorer, Edge, File History, Task View, Mail, Photos, OneDrive, and Google Chrome. The system tray on the right side of the taskbar displays the date (14-08-2024), time (11:27), battery status (ENG IN), and connectivity information.

TASK 3:CREATING TABS

What is a Tab?

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

1. Custom Tabs:

- **Definition:** Custom object tabs are the user interface for custom applications that you build in Salesforce.com. They look and behave like standard Salesforce.com tabs such as Accounts, Contacts, and Opportunities.

2. Web Tabs:

- **Definition:** Web Tabs are custom tabs that display web content or applications embedded in the Salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the Salesforce.com application.

3. Visualforce Tabs:

- **Definition:** Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard Salesforce.com tabs such as Accounts, Contacts, and Opportunities.

4. Lightning Component Tabs:

- **Definition:** Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

5. Lightning Page Tabs:

- **Definition:** Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Steps to create a Tab for Total Rooms:

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

2.Select Object (Total Rooms) > Select the tab style.

3.Next (Add to profiles page) keep it as default

4.Next (Add to Custom App) keep it as default & Save.

Note:Follow the same steps to create remaining objects.

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

- Header:** Includes the Salesforce logo, "Setup", "Home", "Object Manager", a search bar ("Search Setup"), and various navigation icons.
- Left Sidebar:** A sidebar titled "User Interface" with a "Tabs" section selected. It also includes "Rename Tabs and Labels" and a search bar.
- Main Content Area:**
 - Section Header:** "Custom Tabs".
 - Description:** "You can create new custom tabs to extend Salesforce functionality or to build new application functionality."
 - Table:** "Custom Object Tabs" showing the following data:

Action	Label	Tab Style	Description
Edit Del	Customers	People	
Edit Del	Feedbacks	Presenter	
Edit Del	Food Selections	Radar dash	
Edit Del	Payments	Credit card	
Edit Del	Room Bookings	Building Block	
Edit Del	Total Rooms	Keys	
 - Section Header:** "Web Tabs".
 - Description:** "No Web Tabs have been defined."
 - Section Header:** "Visualforce Tabs".
 - Description:** "No Visualforce Tabs have been defined."
- Bottom Bar:** Includes a notification for "Tomorrow's high Near record", a taskbar with various icons (Windows, Search, File Explorer, etc.), and system status indicators (ENG IN, 11:42, 14-08-2024).

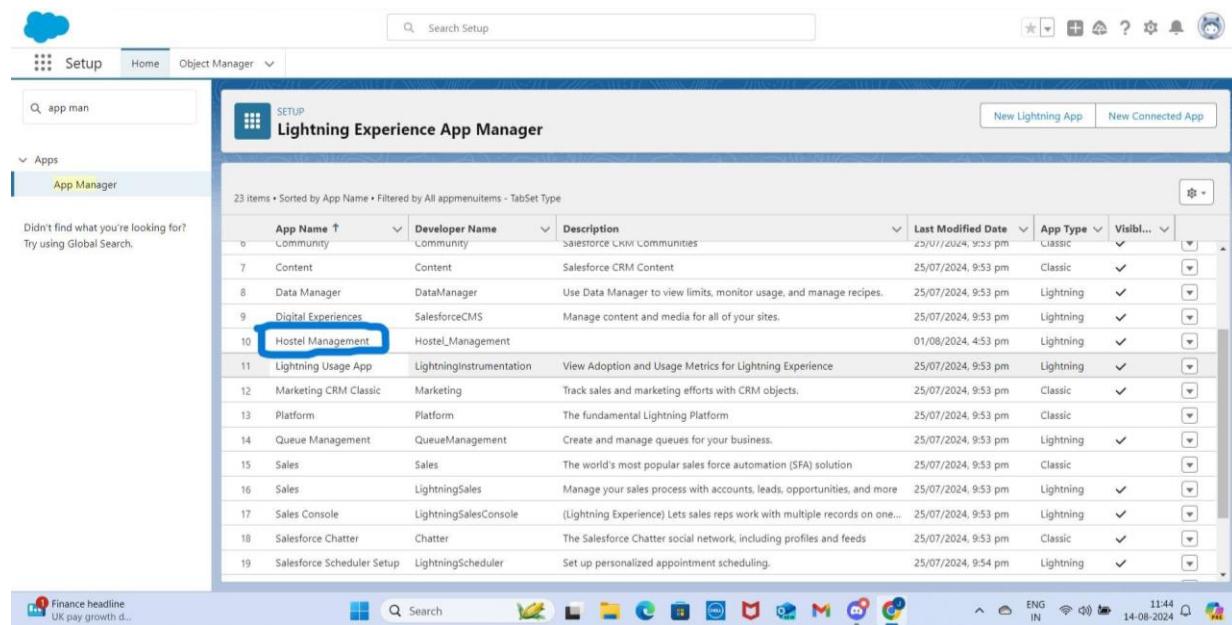
TASK 4: CREATING A LIGHTNING APP

The Lightning App

An app is a collection of items that work together to serve a particular function.

Steps To create a Lightning app page:

1. Go to setup page > search “app manager” in Quick Find > select “App Manager” > click on New Lightning App.
2. Fill the app name in App Details and Branding > Next > (App Option Page) keep it as default > Next > (Utility Items) keep it as default > Next.
3. To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers1, Room Booking, Payments1, Food Selection, Feedbacks, Reports, and Dashboards) from the search bar and move them using the arrow button > Next.
4. To Add User Profiles:
 - Search profiles (System Administrator) in the search bar > click on the arrow button > Save & Finish.



The screenshot shows the Salesforce App Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains 'Search Setup'. Below the navigation is a sidebar with 'Apps' and 'App Manager' selected. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Lightning Experience App Manager' and displays a table of 23 items. The table has columns for 'App Name', 'Developer Name', 'Description', 'Last Modified Date', 'App Type', and 'Visibility'. The 'Hostel Management' row is highlighted with a blue box around its 'App Name' column. Other visible rows include 'Community', 'Content', 'Data Manager', 'Digital Experiences', 'Lightning Usage App', 'Marketing CRM Classic', 'Platform', 'Queue Management', 'Sales', 'Sales', 'Sales Console', 'Salesforce Chatter', and 'Salesforce Scheduler Setup'. The 'App Type' column shows 'Classic' or 'Lightning' for most apps, while 'Hostel Management' is listed as 'Lightning'.

TASK 5:FIELDS & RELTIONSIPS

Types of Fields

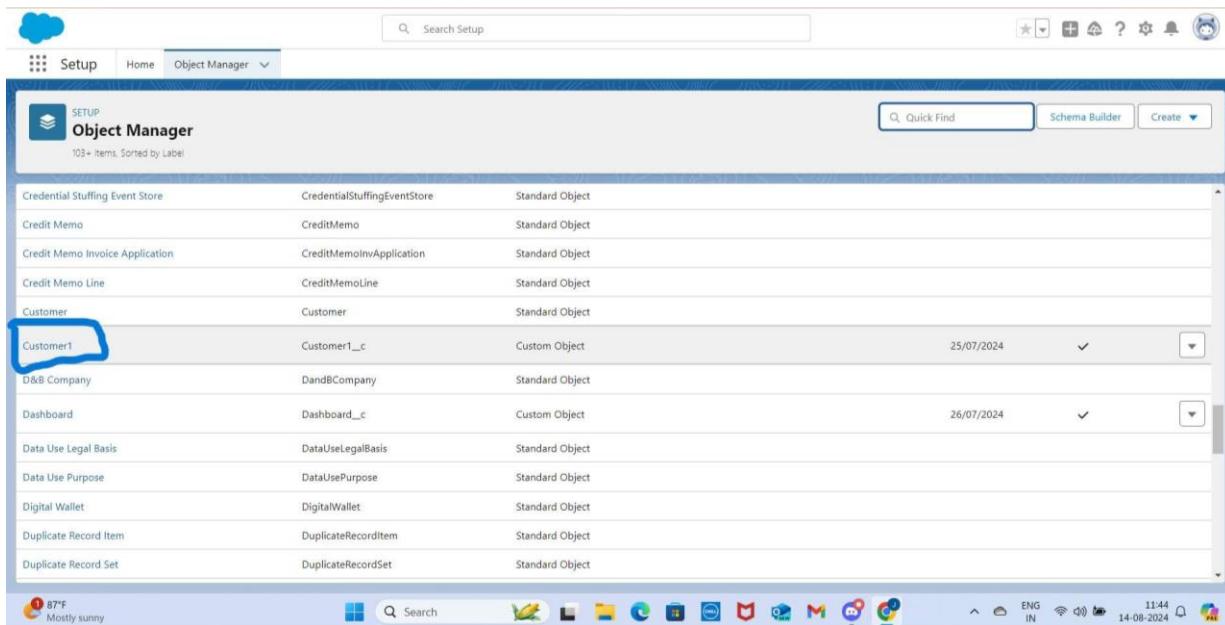
1.Standard Fields:As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task.

2.Custom Fields:On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements.

Steps to create Fields for Customer1 Object:

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

- Now click on “Fields & Relationships” > New
- Select Data Type as a “Phone”
- Click on Next
- Fill the Above as following:
 - Field Label: Phone no
 - Field Name: gets auto generated
- Click on Next > Next > Save and New.



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'SETUP' and 'Object Manager' selected. Below it, a search bar and various icons are visible. The main area is titled 'Object Manager' and shows a list of objects. One row, 'Customer1', is highlighted with a blue border. The columns in the list are 'Name', 'Label', and 'Type'. The 'Customer1' row has 'Customer1_c' in the 'Label' column and 'Custom Object' in the 'Type' column. The rest of the list includes standard objects like Credit Memo, Credit Memo Line, and Customer. At the bottom of the list, there are more objects like Data Use Legal Basis, Digital Wallet, and Duplicate Record Set. The status bar at the bottom shows system information like weather, date, and time.

Name	Label	Type
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object
Credit Memo	CreditMemo	Standard Object
Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object
Credit Memo Line	CreditMemoLine	Standard Object
Customer	Customer	Standard Object
Customer1	Customer1_c	Custom Object
D&B Company	DandBCompany	Standard Object
Dashboard	Dashboard_c	Custom Object
Data Use Legal Basis	DataUseLegalBasis	Standard Object
Data Use Purpose	DataUsePurpose	Standard Object
Digital Wallet	DigitalWallet	Standard Object
Duplicate Record Item	DuplicateRecordItem	Standard Object
Duplicate Record Set	DuplicateRecordSet	Standard Object

TASK 6:VALIDATION RULE

Validation Rule

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Create a Validation Rule for Room Booking Object

1. Go to setup > click on Object Manager > type object name (Room Booking) in the search bar > click on the object.
2. Now click on "Validation Rules" at the top > New.
3. Enter Rule Name: "**checkbox field**" and make the validation rule **Active**.
4. Enter the formula in the Formula box: Advance_payment_for_1month_c = false and check for syntax errors.
5. Enter the Error Message: "**Checkbox should be checked**"
6. Select Error Location as Field: (**Advance_payment_for_1month**)
7. Click on **Save**.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Validation Rules' under the 'Room Booking' object. It displays two validation rules:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
check_in_rule	Check in	Check box should be checked	✓	salla abhinaya, 03/08/2024, 10:37 pm
checkbox_field	Advance Payment for 1 Month	Checkbox should be checked	✓	salla abhinaya, 03/08/2024, 10:35 pm

TASK 7:PROFILES

Profile:

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

Types of profiles in salesforce:

1. Standard profiles
2. Custom Profiles

To Create a New Profile:

1. Go to **Setup** > type **Profiles** in the Quick Find box > click on **Profiles** > clone the desired profile (e.g., Standard User).
2. Enter Profile Name: **Custom User** > **Save**.
3. While still on the profile page, click **Edit**.
4. Scroll down to **Custom Object Permissions** and give **All Access** permissions for:
 - Customers
 - Feedbacks
 - Food Selections
 - Payments
 - Room Bookings
 - Total Rooms
5. Scroll down and click **Save**.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'Users'. The search bar at the top contains 'profile'. The main area displays a list of profiles with columns for Action, Profile Name, User License, and Custom object permissions. A specific row for 'Custom User' is highlighted, showing checked boxes for 'Salesforce' and 'Customer'. The bottom of the screen shows the Windows taskbar with various application icons and system status.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom platform User1	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom platform User2	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

TASK 8:ROLES

Roles:

A role in Salesforce defines a user's visibility access at the record level. Roles are used to specify the types of access that people in your Salesforce organization can have to data.

Marketing Role

1. Go to **Quick Find** > Search for **Roles** > click on **Set Up Roles**.
2. Click on **Expand All** and click on **Add Role** under the **CEO** role.
3. Give **Label** as "**Marketing**" and the **Role Name** gets auto-populated.
4. 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 the **CEO** role.
3. Give **Label** as "**Receptionist**" and the **Role Name** gets auto-populated.
4. Click on **Save**.

TASK 9:USERS

Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Create User

1. Go to **Setup** > type **Users** in the Quick Find box > select **Users** > click **New User**.
 2. Fill in the fields:
 - **First Name:** Sandeep
 - **Last Name:** Gujja
 - **Alias:** Give an Alias Name
 - **Email ID:** Give your Personal Email ID
 - **Username:** Username should be in this form: text@text.com
 - **Nickname:** Give a Nickname
 - **Role:** CEO
 - **User License:** Salesforce
 - **Profile:** Custom User

- ### 3. Click **Save**.

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

- Header:** Search bar with "Search Setup".
- Left Navigation Bar:** "Setup" icon, "Home", "Object Manager", "Users" (selected), "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", and "Users" (under "Users").
- Page Title:** "SETUP" and "Users".
- Section Header:** "All Users".
- Text:** "On this page you can create, view, and manage users." and "To get more licenses, use the Your Account app [Let's Go](#)".
- View Options:** "View: [List Users](#) | [Edit | Create New User](#)".
- Table:** A list of users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes rows for abhiraya_xatla, chatbot, omarz, abhaata, nelli_Ganesh, amila_kandana, intergration, and user_security.
- Buttons:** "New User", "Reset Password(s)", and "Add Multiple Users".
- Page Footer:** Alphabetical navigation links (A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z) and "One" link.

TASK 10:USER ADAPTION

Create a Record (Customers)

1. Click on **App Launcher** on the left side of the screen.
2. Search for **Home Feels** and click on it.
3. Click on the **Customers** tab.
4. Click **New** and fill in the details.
5. Click **Save**.

The screenshot shows the 'Customers' list page in the Home Feels application. At the top, there is a navigation bar with links for Co-Living, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, Dashboards, and user information ('solia abhinaya'). Below the navigation is a search bar and a toolbar with icons for New, Import, Change Owner, and Assign Label. A 'Recently Viewed' section displays three items: Customer Name (Teja Sai Reddy), Akshaya, and Anjana. The main list area shows a table with columns for Customer Name and ID, listing the three names from the recently viewed section.

Customer Name	ID
Teja Sai Reddy	1
Akshaya	2
Anjana	3

View a Record (Customers)

1. Click on **App Launcher** on the left side of the screen.
2. Search for **Home Feels** and click on it.
3. Click on the **Customers** tab.
4. Click on any record name. You can see the details of the customer.

Customer
Teja Sai Reddy

Related Details

Customer Name: Teja Sai Reddy

Phone no: 9491981811

Email: teja@gmail.com

Permanent Address: Amanthapur

Current Status: Employee

Created By: salla abhinaya, 04/08/2024, 8:02 am

Last Modified By: salla abhinaya, 23/08/2024, 6:19 pm

Delete a Record (Customers)

1. Click on **App Launcher** on the left side of the screen.
2. Search for **Home Feels** and click on it.
3. Click on the **Customers** tab.
4. Click on the arrow at the right-hand side of the particular record.
5. Click **Delete** and then click **Delete** again to confirm.

Recently Viewed

Customer Name
1 Teja Sai Reddy
2 Akshaya
3 Anjana

New Import Change Owner Assign Label

Search this list...

Edit Delete Change Owner Edit Labels

TASK 11:REPORTS

Reports

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Create Report

1. Go to the app > click on the **Reports** tab.
2. Click **New Report**.
3. Select report type from category or from report type panel or from search panel
“Customers with Room Bookings with Total Rooms” > click on **Start Report**.
4. Customize your report
 - Add fields from the left pane as shown below
5. Save or run it.

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with links like Co-Living, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is currently selected), Dashboards, and a user profile. Below the navigation is a sidebar with sections for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The main area displays a table titled 'Recent' with columns: Report Name, Description, Folder, Created By, and Created On. There are two entries:

Report Name	Description	Folder	Created By	Created On	Subscribed
Room booking with Payments		Private Reports	salla abhinaya	4/8/2024, 8:10 am	
Room booking report		Private Reports	salla abhinaya	4/8/2024, 7:51 am	

TASK 12:DASHBOARDS

Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Create Dashboard

1. Go to the app > click on the **Dashboards** tab 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**.

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	custom Dashboard		custom Dashboard	salla abhnaya	4/8/2024, 8:17 am	
	Room Booking with Payments		custom Dashboard	salla abhnaya	4/8/2024, 8:31 am	

TASK 13: FLOWS

Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps.

Why Create a Flow:

To automatically populate the Amount field based on the selection of the Room sharing and AC fields, ensuring that the Amount is generated automatically.

Create a Flow

1. Go to **Setup** > type **Flow** in the Quick Find box > click on **Flows** and select **New Flow**.
2. Select **Record-Triggered Flow** and click **Create**.
3. Select the **Object** as **Room Booking** from the drop-down list.
4. Select the **Trigger Flow When**: "A record is Created or Updated".
5. Select **Optimize the Flow For**: "Actions and Related Records" and click **Done**.
6. Under the Record-Triggered Flow, click on the "+" **Symbol** and in the drop-down list, select "**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**.
9. Click on "**Add Condition**":
 - **Resource**: Select **Record.AC-3000**.
 - **Operator**: Select **Equals**.
 - **Value**: Select **False**.
10. Click on the "+" **Symbol** in the Outcome Order.
11. 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**.

12. Click on “**Add Condition**”:

- **Resource:** Select **Record.AC-3000**.
- **Operator:** Select **Equals**.
- **Value:** Select **False**.

13. Click on the “+” **Symbol** in the Outcome Order.

14. 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**.

15. Click on “**Add Condition**”:

- **Resource:** Select **Record.AC-3000**.
- **Operator:** Select **Equals**.
- **Value:** Select **False**.

16. Click on the “+” **Symbol** in the Outcome Order.

17. 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**.

18. Click on “**Add Condition**”:

- **Resource:** Select **Record.AC-3000**.
- **Operator:** Select **Equals**.
- **Value:** Select **True**.

19. Click on the “+” **Symbol** in the Outcome Order.

20. 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**.

21. Click on “**Add Condition**”:

- **Resource:** Select **Record.AC-3000**.
- **Operator:** Select **Equals**.
- **Value:** Select **True**.

22. Click on the “+” **Symbol** in the Outcome Order.

23. 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**.

24. Click on “Add Condition”:

- **Resource:** Select **Record.AC-3000**.
- **Operator:** Select **Equals**.
- **Value:** Select **True**.

25. Click on **Done**.

26. Click on the “+” **Symbol** under **Single sharing** and select “**Update Records**” from the drop-down list.

27. 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

28. Click **Done**.

29. 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

30. Click **Done**.

31. 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

32. Click **Done**.

33. 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

34. Click **Done**.

35. 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

36. Click **Done**.

37. 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

38. Click **Done**.

39. The Flow will form like this. Click **Save**.

40. Enter the **Flow Label:** Update Amount Field, **Flow API Name:** Gets automatically generated and click **Save**.

The screenshot shows the Salesforce Flow Definitions page. The left sidebar includes links for Setup, Home, Object Manager, Process Automation (with Flows selected), Identity, and Login Flows. A search bar at the top right contains the text 'flows'. The main content area displays a table titled 'Flow Definitions' with a 'All Flows' dropdown set to '4'. The table has columns for Flow Label, Process Type, Active, Template, Package State, Package Name, Last Modified By, and Last Modified Date. The table lists various flows such as 'Inbound New Appointment', 'Inbound New Guest Appointment', 'Modify Guest Service Appointment', etc. The 'Update Amount Field' flow is listed at the bottom of the table.

Flow Label	Process Type	Active	Template	Package State	Package Name	Last Modified By	Last Modified Date
Inbound New Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Inbound New Guest Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Modify Guest Service Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Orchestration flow for Recurrence Scheduler	Auto-launched Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Order on Behalf Of Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Outbound Modify Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Outbound New Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Reassign Multiple Service Appointments	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed			
Recurrence Schedule Flow	Auto-launched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed			
Reset Password	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Rework Order Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Return Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
RMA Create Credit Memo and Ensure Refunds Flow	Auto-launched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
RMA Return Items	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Send Appointment Invitation to Actionable List Members	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed			
Update Amount Field	Auto-launched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	salla abhinaya	04/08/2024, 9:23 am	
Verify Identity	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			

Test the Flow

1. Go to **App Launcher** and search for **Co-living**, then select the app.
2. In the **Co-living** app, click on the **Room Sharing** tab and click **New**.
3. Enter the details:
 - **Name**
 - **Room Sharing**
 - **AC-3000**
 - **Advance Payment for 1 Month**
4. Note: The **Amount** field should be empty before saving the record.
5. After saving the record, the **Amount** field will be populated automatically based on the flow configurations.

The screenshot shows the 'Room Booking' screen in the 'Co-Living' application. At the top, there's a navigation bar with links for Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, Dashboards, and a user profile for 'salla abhinaya'. Below the navigation is a header bar with 'Room Booking RN-001' and buttons for New Contact, Edit, and New Opportunity. The main area is titled 'Details' and contains the following fields:

Room No	RN-001
Room Sharing	Single sharing
Name	Teja Sai Reddy
AC-3000	(checkbox)
Advance Payment for 1 Month	(checkbox) <input checked="" type="checkbox"/>
Amount	₹10,000
Total No Of Rooms	5
Rooms Available	28
Check in	(checkbox) <input checked="" type="checkbox"/>
Check Out	(checkbox)
Created By	salla abhinaya, 04/08/2024, 8:26 am
Last Modified By	salla abhinaya, 04/08/2024, 8:26 am