

Project: A CRM Application to Manage the Booking of Co-Living.

It aims to create a vibrant and inclusive community where individuals can live, work, and connect with like-minded people. We believe that living together in a shared environment fosters collaboration, reduces isolation, and enhances the overall quality of life.

The co-living space will feature a carefully designed layout that balances privacy and communal areas. Co-living Space is an application where customer Details is stored in order to choose the different AC rooms with Multiple Sharing. Special foods items will be selected by the user in Daily and make Payments in different modes. And Also give the feedback of the service like Room cleaning, internet connection and foods etc.

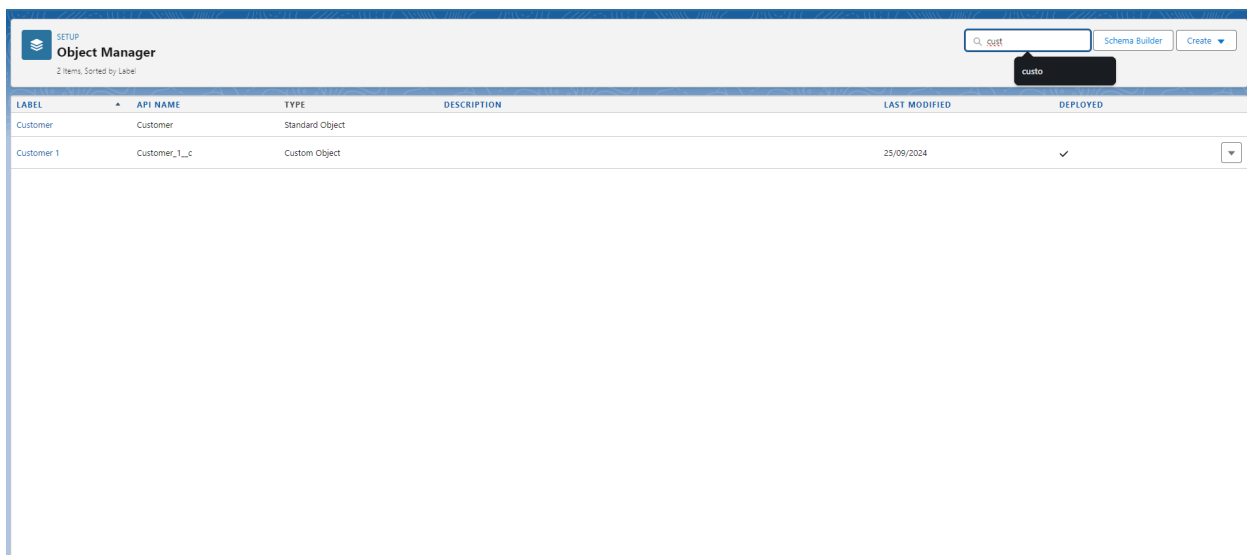
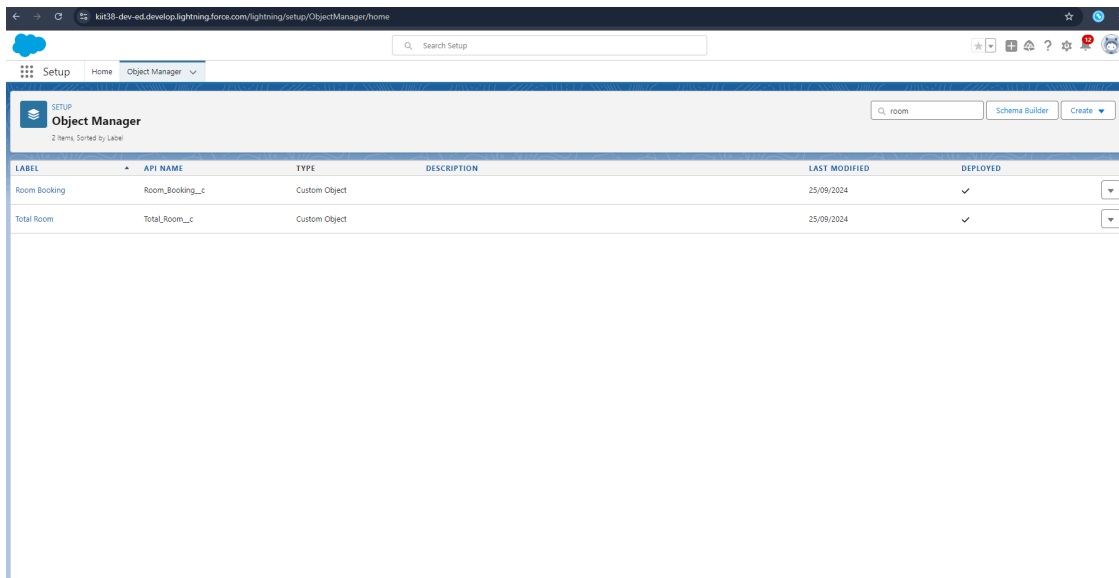
CREATION

First, we created and activated a Salesforce developer account.

OBJECT

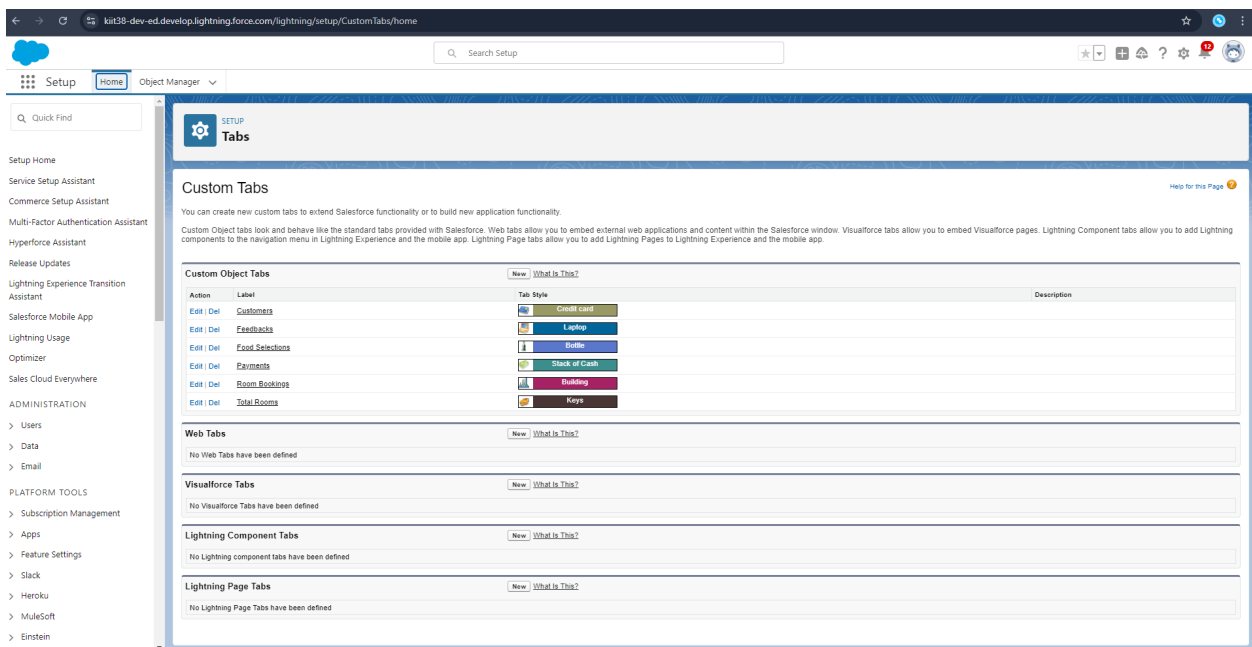
A database tables that permit you to store data that is specific to an organization.

Next, six objects were created, including Total Room, Customer, Room Booking, Payment, Food Selection, and Feedback in object manager. Below are the screenshots of few of them:



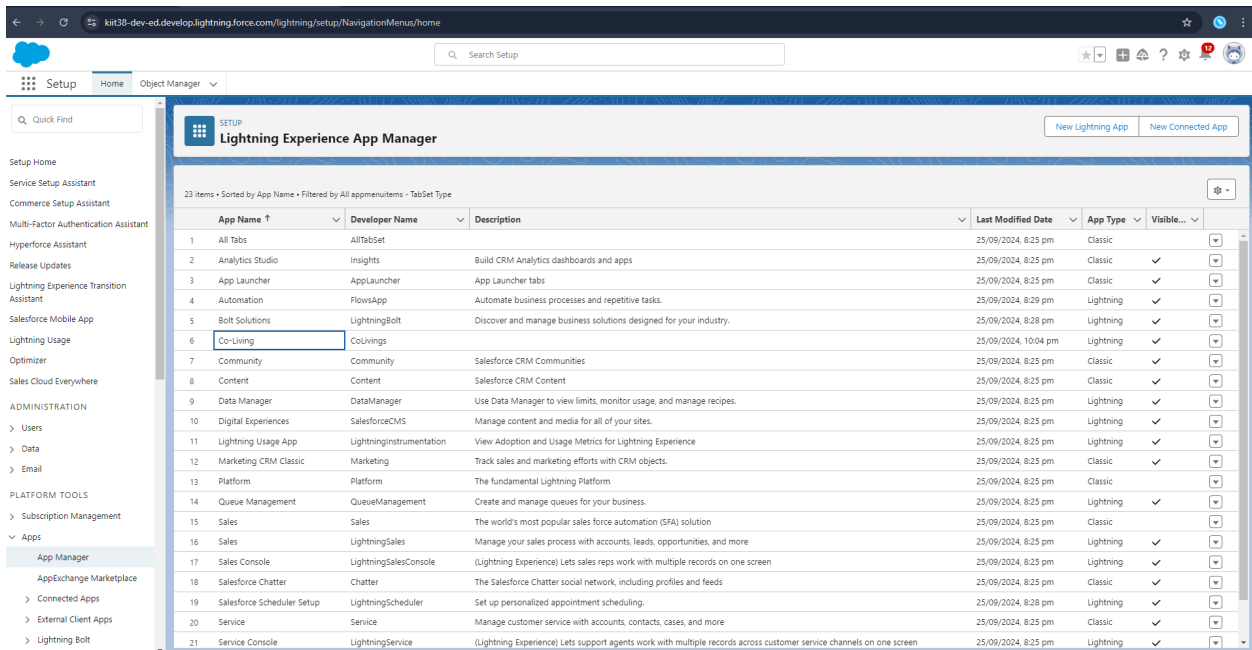
TAB CREATION

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



THE LIGHTENING 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.



The 'Co-Living' is the lightening app that we created.

FIELDS AND RELATIONSHIPS

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.

Below are few of the screenshots:

Setup

Home

Object Manager

Search Setup

Customer 1

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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	Email__c	Email		
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		

<div> <input type="text" value="Search Setup"/> </div> <div> Setup Home Object Manager </div>				
<div> <div> Room Booking </div> </div>				
Details	<div> Fields & Relationships 12 Items, Sorted by Field Label <div> <input type="text" value="Quick Find"/> New Deleted Fields Field Dependencies Set History Tracking </div> </div>			
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD INDEXED
Page Layouts	AC-3000	AC_3000__c	Checkbox	
Lightning Record Pages	Advance Payment for 1 Month	Advance_Payment_for_1_Month__c	Checkbox	
Buttons, Links, and Actions	Amount	Amount__c	Currency(18, 0)	
Compact Layouts	Check in	Check_in__c	Checkbox	
Field Sets	Check Out	Check_Out__c	Checkbox	
Object Limits	Created By	CreatedById	Lookup(User)	
Record Types	Last Modified By	LastModifiedById	Lookup(User)	
Related Lookup Filters	Name	Name__c	Master-Detail(Customer 1)	✓
Search Layouts	Room No	Name	Auto Number	✓
List View Button Layout	Room Sharing	Room_Sharing__c	Picklist	
Restriction Rules	Rooms Available	Rooms_Available__c	Formula (Number)	
Scoping Rules	Total No Of Rooms	Total_No_Of_Rooms__c	Master-Detail(Total Room)	✓
Triggers				
Flow Triggers				
Validation Rules				

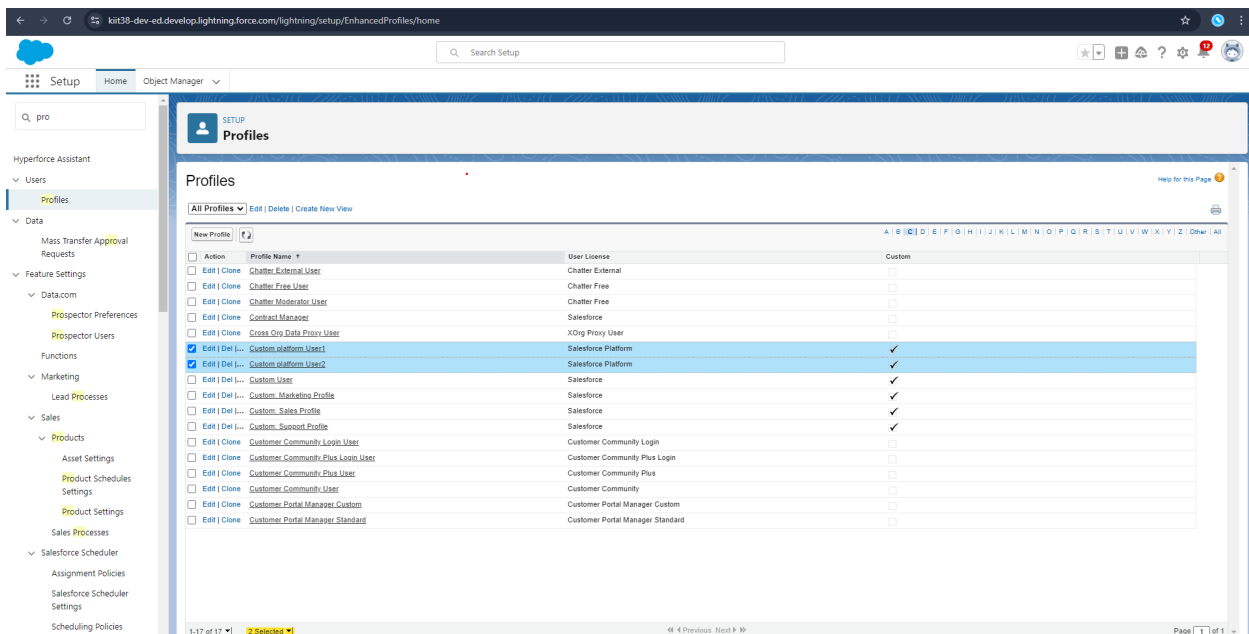
VALIDATION RULES

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.

<div> <input type="text" value="Search Setup"/> </div> <div> Setup Home Object Manager </div>				
<div> <div> Room Booking </div> </div>				
Details	<div> Validation Rules 2 Items, Sorted by Rule Name <div>New</div> </div>			
Fields & Relationships	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE MODIFIED BY
Page Layouts	check_in_rule	Check in	Check box should be checked	✓ Shreya Mondal, 25/09/2024, 11:42 pm
Lightning Record Pages	checkboxbox_field	Advance Payment for 1 Month	Checkbox should be checked.	✓ Shreya Mondal, 25/09/2024, 11:41 pm
Buttons, Links, and Actions				
Compact Layouts				
Field Sets				
Object Limits				
Record Types				
Related Lookup Filters				
Search Layouts				
List View Button Layout				
Restriction Rules				
Scoping Rules				
Triggers				
Flow Triggers				
Validation Rules				

PROFILES

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.



ROLES

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

The screenshot shows the Salesforce Lightning Setup interface. The left sidebar contains the Setup menu with 'Users' selected. The main content area is titled 'All Users' and includes instructions on how to create and manage users. Below the instructions is a table of existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table lists several users, including Chatter Expert, various Salesforce users, and system administrators. At the bottom, there are links to 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

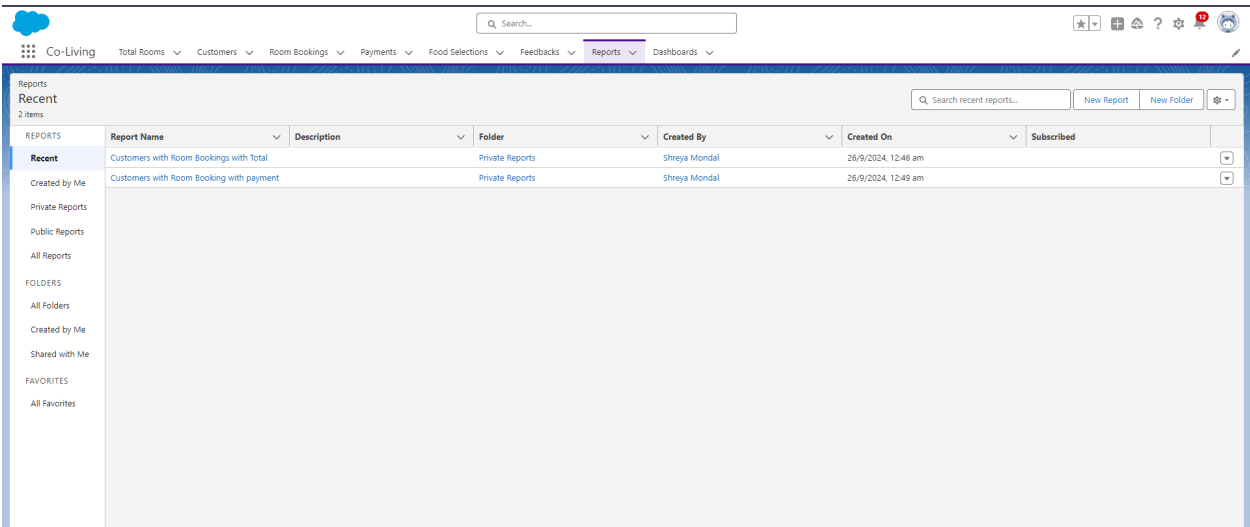
Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter_000v00000cudumad@chatter.salesforce.com		✓	Chatter Free User
Edit	Parasath Abhinash	aparath	bondyep@gmail.com	Marketing	✓	Custom Salesforce User1
Edit	Pavithra Ganesh	pavith	21052962@gmail.com	Recruitment	✓	Custom Salesforce User2
Edit	Swila Sandeeq	swil	shwaramondar2362@gmail.com	CEO	✓	Custom User
Edit	Mondal Shreya	shmond	shwaramondar2362@gmail.com		✓	System Administrator
Edit	User Integration	integration	integration000v00000cudumad.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	integration000v00000cudumad.com		✓	Analytics Cloud Security User

USER ADOPTION

Here we had to create, view and delete a record of customer.

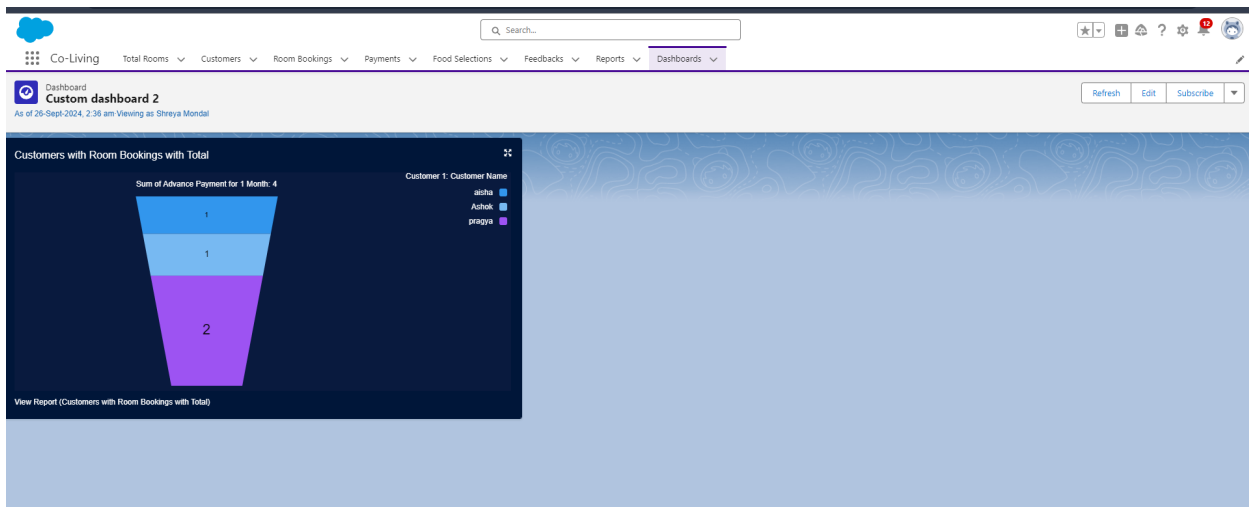
REPORTS

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.



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.



Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Flow created-

The screenshot shows the "Updated flow" page in Salesforce. The top navigation bar is the same as the dashboard. The page title is "Flow Updated flow". Below the title, there are buttons for "Open Flow", "Open Latest Version", and "Change Owner". The main content area shows details for the flow "Updated_flow".

Type	Associated Record	Progress Status	Last Modified Date	Flow Owner
Record—Run After Save		Cancelled	26/09/2024, 2:35 am	Shreya Mondal

Below the table, there is a "Details" section with a "Related" tab and an "Information" tab. The "Information" tab is active, showing the following details:

Field	Value
Flow Label	Updated_flow
Description	
Associated Record	
Created By	Shreya Mondal - 26/09/2024, 1:45 am
Last Modified	Shreya Mondal - 26/09/2024, 2:35 am
Category	
API Name	Updated_flow
Flow Type	Record-Triggered After Save Flow
Created Date	26/09/2024, 1:45 am
Last Modified Date	26/09/2024, 2:35 am
Subcategory	

Flow-

