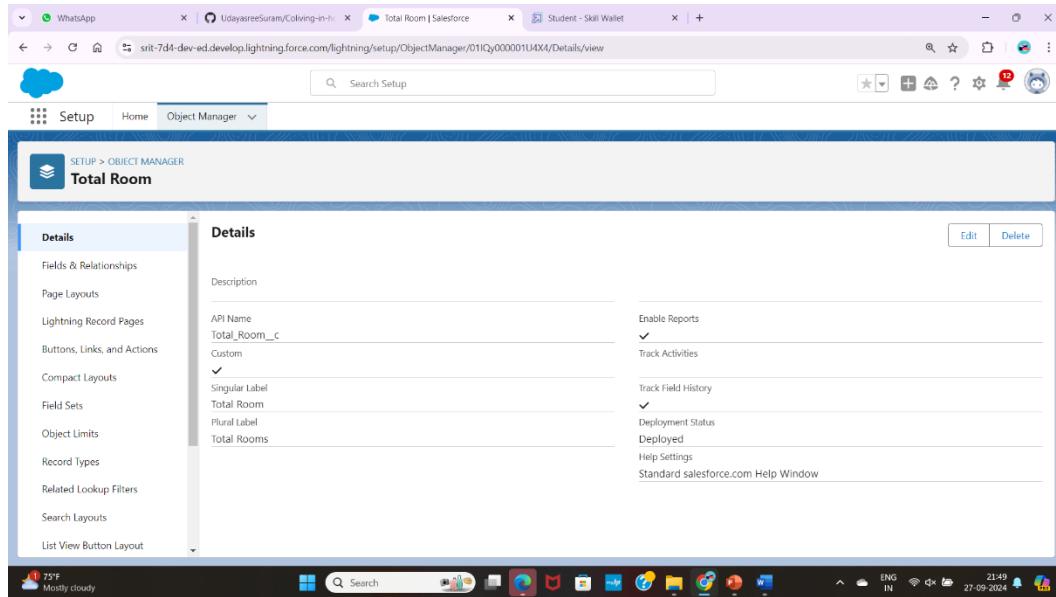


Screenshots of A crm application to manage the booking of co-living

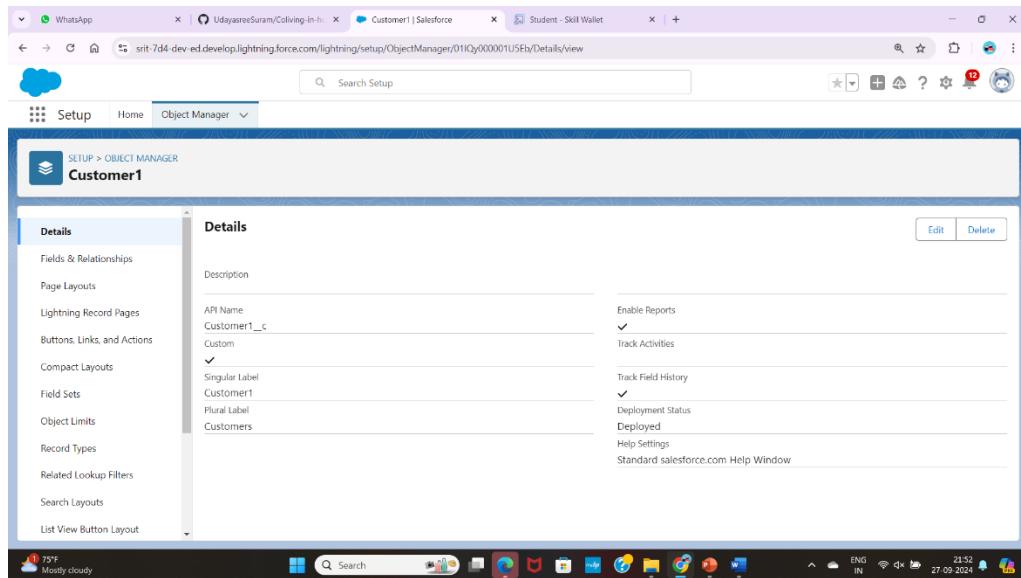
By – Udayasree (Email- 214g1a05b4@srit.ac.in)

Objects

1.Create a custom object for Total Rooms



2. Create a custom object for Customer1



3. Create a custom object for Room Booking

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

Object Manager Details:

- Description:** Room Booking
- API Name:** Room_Booking__c
- Custom:** Custom
- Singular Label:** Room Booking
- Plural Label:** Room Bookings

Object Settings:

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

Left Sidebar: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout.

4. Create a custom object for Payment

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

Object Manager Details:

- Description:** Payment1
- API Name:** Payment1__c
- Custom:** Custom
- Singular Label:** Payment1
- Plural Label:** Payments

Object Settings:

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

Left Sidebar: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout.

5. Create a custom object for Food Selection

The screenshot shows the Salesforce Setup interface for creating a new custom object named "Food Selection". The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main "Details" section shows the API Name as "Food_Selection__c", Singular Label as "Food Selection", and Plural Label as "Food Selections". On the right, there are checkboxes for enabling Reports, Activities, Field History, and Deployment Status, all of which are checked. The status is listed as "Deployed". The bottom status bar shows "USD/CAD" at 0.5398 and the date/time as 27-09-2024.

6. Create a custom object for feedback

The screenshot shows the Salesforce Setup interface for creating a new custom object named "Feedback". The left sidebar lists various setup categories. The main "Details" section shows the API Name as "Feedback__c", Singular Label as "Feedback", and Plural Label as "Feedbacks". On the right, there are checkboxes for enabling Reports, Activities, Field History, and Deployment Status, all of which are checked. The status is listed as "Deployed". The bottom status bar shows "Today's low Near record" and the date/time as 27-09-2024.

Fields and Relationship

Creation of fields for the customer1 object

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

- Page Title:** SETUP > OBJECT MANAGER
- Object Name:** Feedback
- Section:** Fields & Relationships
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table Data:** A list of fields for the Feedback object, including:
 - Created By (CreatedById, Lookup(User))
 - Feedback No (Name, Auto Number)
 - Food (Food__c, Picklist)
 - Internet (Internet__c, Picklist)
 - Last Modified By (LastModifiedById, Lookup(User))
 - Name (Name__c, Lookup(Customer1))
 - Owner (OwnerId, Lookup(User,Group))
 - Roomcleaning (Roomcleaning__c, Picklist)

Amount

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

- Page Title:** SETUP > OBJECT MANAGER
- Object Name:** Room Booking
- Section:** Fields & Relationships
- Custom Field Definition Detail:** Room Booking Custom Field Amount
- Field Information:**

Field Label	Amount	Object Name	Room Booking
Field Name	Amount	Data Type	Currency
API Name	Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	UDAYASREE SURAM 27/09/2024, 2:44 pm	Modified By	UDAYASREE SURAM 27/09/2024, 2:44 pm
- General Options:**
 - Required:
 - Default Value: (empty)

Advancement Payment for 1 month

The screenshot shows the Salesforce Setup interface for the 'Room Booking' object. A custom field named 'Advance Payment for 1 Month' has been created. The field details are as follows:

Field Label	Field Name	Object Name	Data Type
Advance Payment for 1 Month	Advance_Payment_for_1_Month	Room Booking	Checkbox

The field is set to be used on the Room Booking object. It was created by UDAYASREE SURAM on 27/09/2024 at 2:42 pm and modified by the same user at the same time.

AC-300

The screenshot shows the Salesforce Setup interface for the 'Room Booking' object. A custom field named 'AC-3000' has been created. The field details are as follows:

Field Label	Field Name	Object Name	Data Type
AC-3000	AC_3000	Room Booking	Checkbox

The field is set to be used on the Room Booking object. It was created by UDAYASREE SURAM on 27/09/2024 at 2:42 pm and modified by the same user at the same time.

Check-in

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Room Booking' under 'Object Manager'. The main content area is titled 'Room Booking Custom Field Check in'. The 'Field Information' section shows the following details:

Field Label	Check in	Object Name	Room Booking
Field Name	Check_in	Data Type	Checkbox
API Name	Check_in_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Below this, the 'General Options' section shows 'Default Value' as 'Unchecked'. The bottom of the page includes a 'Field Dependencies' section and a toolbar with various icons.

Check-out

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Room Booking' under 'Object Manager'. The main content area is titled 'Room Booking Custom Field Check Out'. The 'Field Information' section shows the following details:

Field Label	Check Out	Object Name	Room Booking
Field Name	Check_Out	Data Type	Checkbox
API Name	Check_Out_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Below this, the 'General Options' section shows 'Default Value' as 'Unchecked'. The bottom of the page includes a 'Field Dependencies' section and a toolbar with various icons.

Total no of rooms

The screenshot shows the Salesforce Setup interface for the 'Room Booking' object. A custom field named 'Total No Of Rooms' has been created. The field details are as follows:

- Field Label:** Total No Of Rooms
- Field Name:** Total_No__Of_Rooms
- API Name:** Total_No__Of_Rooms_c
- Description:** Help Text
- Data Owner:** Field Usage
- Data Sensitivity Level:** Standard
- Compliance Categorization:** None
- Created By:** UDAYASREE SURAM, 27/09/2024, 2:45 pm
- Object Name:** Room Booking
- Data Type:** Master-Detail
- Modified By:** UDAYASREE SURAM, 27/09/2024, 2:45 pm

The 'Master-Detail Options' section indicates that the field is related to the 'Total Room' object.

Validation rules

The screenshot shows the Salesforce Setup interface for the 'Room Booking' object. A validation rule named 'checkbox_field' has been created. The rule details are as follows:

- Rule Name:** checkbox_field
- Error Condition Formula:** Advance_Payment_for_1_Month__c = false
- Error Message:** Checkbox should be checked
- Description:** None
- Created By:** UDAYASREE SURAM, 27/09/2024, 5:40 pm
- Active:** Yes
- Error Location:** Advance Payment for 1 Month
- Modified By:** UDAYASREE SURAM, 27/09/2024, 5:40 pm

The screenshot shows the Salesforce Setup interface for the Room Booking object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area displays a validation rule named 'Validation_rule' with the formula 'Check_in__c = False'. The rule is active and was created by UDAYASREE SURAM on 27/09/2024 at 5:42 pm. The status bar at the bottom indicates it's 22:05 IN 27-09-2024.

Profiles

The screenshot shows the Salesforce Setup interface for Profiles. The sidebar indicates the user is viewing the 'Profiles' section under 'Users'. The main content area shows a list of profiles, including 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', 'Standard User', and 'System Administrator'. The 'User License' column shows 'Salesforce Integration' for the first profile and 'Salesforce' for the others. The status bar at the bottom indicates it's 22:12 IN 27-09-2024.

Roles

Marketing

The screenshot shows the Salesforce Setup interface for managing roles. The left sidebar navigation includes 'Setup' (selected), 'Home', and 'Object Manager'. Under 'Users', 'Roles' is selected. The main content area displays the 'Marketing' role detail page. The role has a label 'Marketing' and is assigned to the 'CEO' user. It has 'Case Access' and 'Case Team Roles' assigned. The 'Users in Marketing Role' section lists one user: 'Abhilash agarati' (alias 'agara', username 'sudayasesuram@sura.com'). The status is 'Active'. The system bar at the bottom shows the date as 27-09-2024.

Receptionist

The screenshot shows the Salesforce Setup interface for managing roles. The left sidebar navigation includes 'Setup' (selected), 'Home', and 'Object Manager'. Under 'Users', 'Roles' is selected. The main content area displays the 'Receptionist' role detail page. The role has a label 'Receptionist' and is assigned to the 'CEO' user. It has 'Case Access' and 'Case Team Roles' assigned. The 'Users in Receptionist Role' section lists one user: 'Ganesh gelli' (alias 'ggell', username 'suram@gmail.com'). The status is 'Active'. The system bar at the bottom shows the date as 27-09-2024.

Users

sandeep

User Detail

Name	sandeep gujja	Role	CEO
Alias	sguj	User License Profile	Salesforce Custom User
Email	udaysreesuram@gmail.com [Verify]	Active	<input checked="" type="checkbox"/>
Username	udaysreesuram@suram.com	Marketing User	<input type="checkbox"/>
Nickname	Sunny	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	Krishnapuram 1st road, Tadipatri Anantapur 522403 Andhra Pradesh India	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	View
Language	English	Data.com User Type	View
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager			

Ganesh

User Detail

Name	Ganesh gelli	Role	Receptionist
Alias	ggell	User License Profile	Salesforce Platform Custom platform User2
Email	udaysreesuram@gmail.com [Verify]	Active	<input checked="" type="checkbox"/>
Username	suram@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	Bunny	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	Krishnapuram 1st road, Tadipatri Anantapur 522403 Andhra Pradesh India	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)		

Abhilash

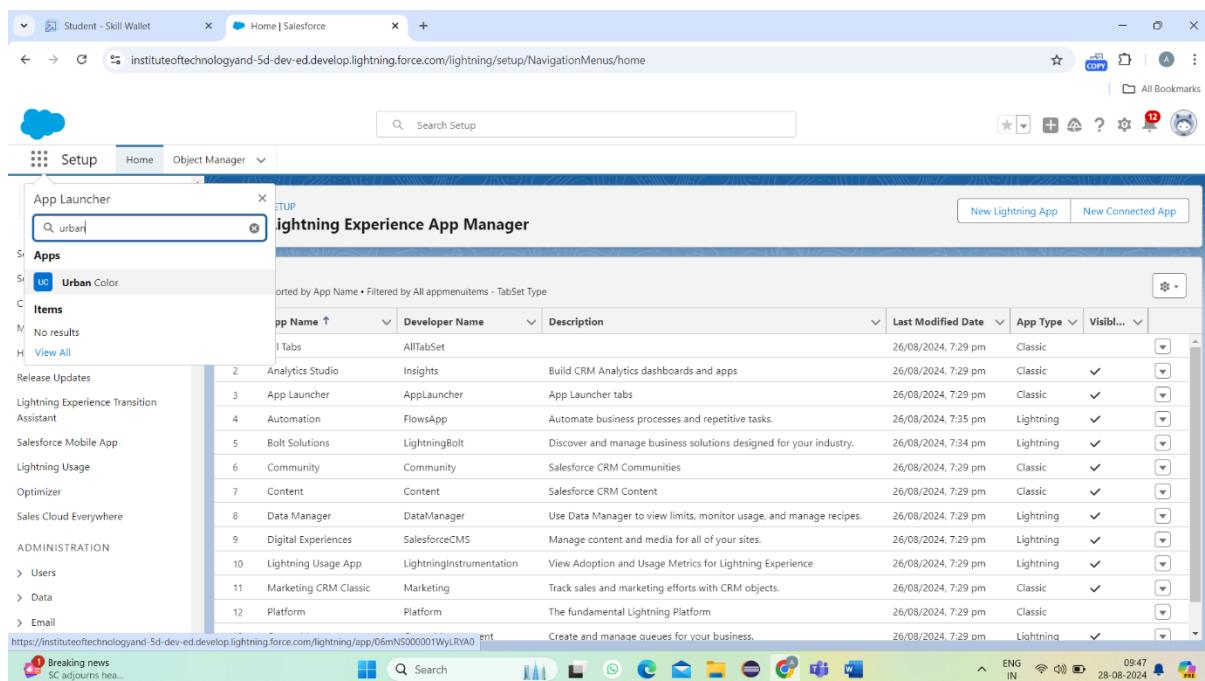
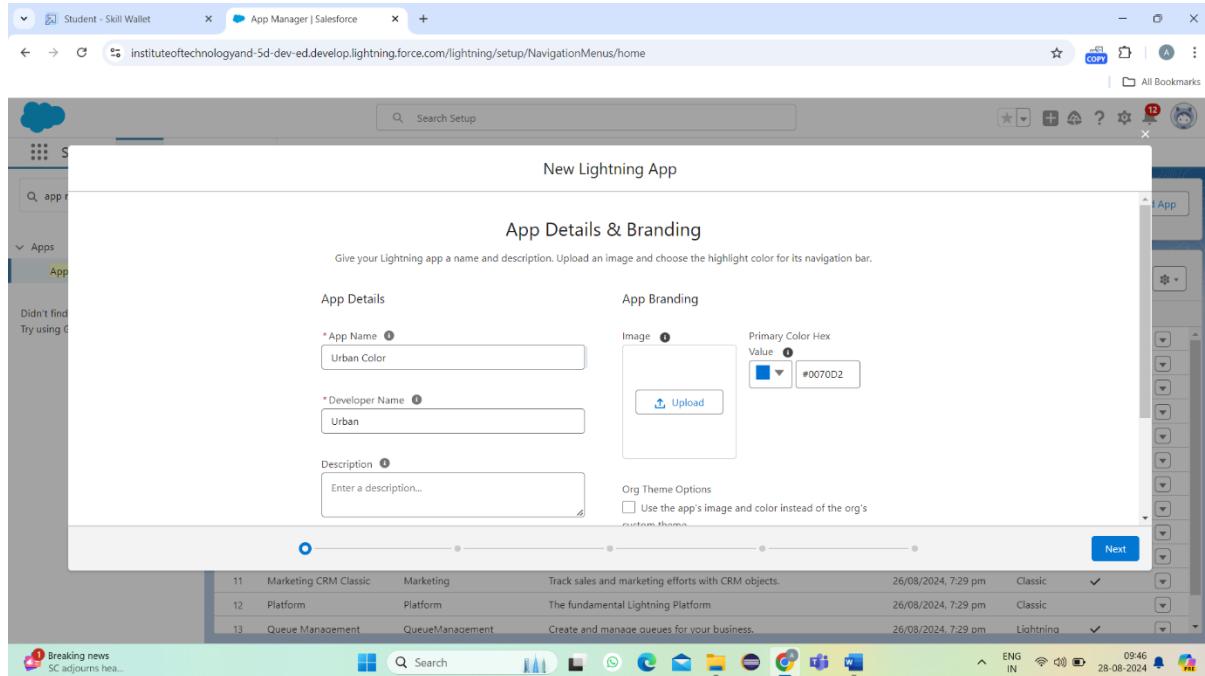
The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is titled 'Users' and includes sections for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a selected 'Users' section. Under 'Users', there's a 'Prospector Users' link. A message at the bottom says 'Did you find what you're looking for? Try using Global Search.' The main content area displays the user profile for 'Abhilash garapati'. The 'User Detail' section shows the following information:

Name	Abhilash garapati	Role	Marketing
Alias	agara	User License	Salesforce Platform
Email	udayasreesuram@gmail.com	Profile	Custom platform User1
Username	sudayasreesuram@sura.com	Active	<input checked="" type="checkbox"/>
Nickname	Bunny	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	Krishnapuram 1st road, Tadipatri Anantapur 524043 Andhra Pradesh India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

At the top of the main content area, there are several tabs: 'Permission Set Assignments', 'Permission Set Assignments: Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', 'Personal Groups', 'Public Group Membership', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Apps', 'Third-Party Account Links', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Login History', and 'User Provisioning Accounts'. A 'User Profile Help for this Page' link is also present.

The screenshot shows the Salesforce Setup interface for managing object layouts. The left sidebar includes sections for Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area shows the 'Consultant' object's page layout configuration. The 'Fields' section lists fields such as Section, Blank Space, Address, Consultants, Created By, Customer details, Customer Name, Delivery Type, Email id, Last Modified By, Mobile Number, Payment, and Products. The 'Consultant Details' section contains a table with columns for 'Information' (Header visible on edit only) and 'System Information' (Header visible on edit only). The 'Information' section includes fields like Customer Id, Customer Name, Mobile Number, Delivery Type, Address, Email id, Products, Payment, and Customer details. The 'System Information' section includes Created By and Last Modified By. A 'Layout Properties' tab is also visible at the top of the page layout editor.

The Lightning App



You haven't viewed any Our Customers recently.
Try switching list views.

User

Create a Record (Customers)

Index	Item
1	Total No Of Rooms
2	VP of Services
3	Applicant
3	UDAYASREE

View a Record (Customers)

The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Total Room | UDAYASREE". The page displays a customer record for "UDAYASREE". The "Details" tab is selected, showing the following information:

Total No Of Rooms	Owner
UDAYASREE	UDAYASREE SURAM
Rooms Booked	1
Rooms Available	29
Created By	UDAYASREE SURAM, 27/09/2024, 7:16 pm
Last Modified By	UDAYASREE SURAM, 27/09/2024, 7:17 pm

The browser's address bar shows the URL: srit-7d4-dev-ed.lightning.force.com/lightning/r/Total_Room_c/a00Qy00000LQx6oAD/view. The system navigation bar includes links for Total Rooms, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The bottom of the screen shows a Windows taskbar with various pinned icons and system status.

Delete record

The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Recently Viewed | Customers". The page displays a list of recently viewed customers under the heading "Recently Viewed". There are 7 items listed:

Customer Name
1 Sree
2 udaya
3 sandeep
4 Prasas
5 Ganesh
6 Mandeep
7 Sandeep

A context menu is open over the last item, listing options: Edit, Delete, Change Owner, and Edit Labels. The browser's address bar shows the URL: srit-7d4-dev-ed.lightning.force.com/lightning/o/Customer1_c/list?filterName=_Recent. The system navigation bar includes links for Total Rooms, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The bottom of the screen shows a Windows taskbar with various pinned icons and system status.

Reports

Report: Customers with Room Bookings and Total Rooms
Room booking report

Total Records	Total Advance Payment for 1 Month	Total AC-3000	Total Amount
3	3	3	₹1,600

Customer Name	Room Booking: Room No	Phone no	Email	Permanent Address	Current Status	Room Sharing	Advance Payment for 1 Month
udaya (1)	RN-002	7569192505	surami@gmail.com	Krishnapuram 2nd road, Tadipatri	Student	Double sharing	<input checked="" type="checkbox"/>
Subtotal							1
Sree (1)	RN-003	9569192508	sreesuram@gmail.com	Krishnapuram 3rd road	Student	Triple sharing	<input checked="" type="checkbox"/>
Subtotal							1
sandeep (1)	RN-001	7569192508	udaysreesuram@gmail.com	Krishnapuram 1st road, Tadipatri	Student	Single sharing	<input checked="" type="checkbox"/>
Subtotal							1
Total (3)							3

Row Counts Detail Rows Subtotals Grand Total

74°F Mostly cloudy 22:23 27-09-2024 ENG IN

Room booking reports

Report: Customers with Payments and Room Booking
Room booking report

Total Records	Total Room Booking: Advance Pay...	Total Room Booking: AC-3000	Total Amount
3	3	3	₹1,600.00

Customer Name	Room Booking: Room No	Phone no	Email	Permanent Address	Current Status	Room Booking: Room Sharing	Room Booking: Adv...
sandeep (1)	RN-001	7569192508	udaysreesuram@gmail.com	Krishnapuram 1st road, Tadipatri	Student	Single sharing	<input checked="" type="checkbox"/>
Subtotal							1
Sree (1)	RN-003	9569192508	sreesuram@gmail.com	Krishnapuram 3rd road	Student	Triple sharing	<input checked="" type="checkbox"/>
Subtotal							1
udaya (1)	RN-002	7569192505	surami@gmail.com	Krishnapuram 2nd road, Tadipatri	Student	Double sharing	<input checked="" type="checkbox"/>
Subtotal							1
Total (3)							3

Row Counts Detail Rows Subtotals Grand Total

74°F Mostly cloudy 22:23 27-09-2024 ENG IN

Dashboard

The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Dashboards | Salesforce" and displays a dashboard titled "Co-living in hostel". The dashboard interface includes a navigation bar with links like "Total Rooms", "Customers", "Room Bookings", "Payments", "Food Selections", "Feedbacks", "Reports", and "Dashboards". On the left, there's a sidebar with sections for "DASHBOARDS", "FOLDERS", and "FAVORITES", each with sub-links. The main content area contains a table with columns: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. Two items are listed: "custom dashboard" and "component dashboard", both created by "UDAYASREE SURAM" on 27/9/2024.

The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Consultant Dashboard | Salesforce" and displays a dashboard titled "Urban Color Consultant Dashboard". The dashboard interface includes a navigation bar with links like "Our Customers", "Consultants", "Retailers", "others", "Reports", and "Dashboards". The main content area features a chart titled "Consultant report" showing "Record Count" for different payment types: NetBanking (6), Cash (2), and others (8). Below the chart is a link "View Report (Consultant report)". The status bar at the bottom shows weather information: "27°C Haze".

Room Bookings

The screenshot shows a web browser window with multiple tabs open. The active tab is 'Recently Viewed | Room Bookings' from the URL 'srit-7d4-dev-ed.lightning.force.com/lightning/o/Room_Booking__c/list?filterName=_Recent'. The page title is 'Co-living in hostel'. The main content area displays a list titled 'Recently Viewed' under 'Room Bookings'. It shows 3 items, all updated a few seconds ago, with columns for 'Room No' and checkboxes. The items listed are RN-003, RN-002, and RN-001.

	Room No
1	RN-003
2	RN-002
3	RN-001

At the bottom of the screen, the Windows taskbar shows the date as 27-09-2024 and the time as 22:26. The system tray indicates an internet connection and battery status.

Payments

The screenshot shows a web browser window with multiple tabs open. The active tab is 'Recently Viewed | Payments' from the URL 'srit-7d4-dev-ed.lightning.force.com/lightning/o/Payment1__c/list?filterName=_Recent'. The page title is 'Co-living in hostel'. The main content area displays a list titled 'Recently Viewed' under 'Payments'. It shows 3 items, all updated a few seconds ago, with columns for 'Payment No' and checkboxes. The items listed are PNO-003, PNO-002, and PNO-001.

	Payment No
1	PNO-003
2	PNO-002
3	PNO-001

At the bottom of the screen, the Windows taskbar shows the date as 27-09-2024 and the time as 22:26. The system tray indicates an internet connection and battery status.

Food Selection

The screenshot shows a web browser window with multiple tabs open. The active tab is titled 'Recently Viewed | Food Selections'. The URL is 'srit-7d4-dev-ed.lightning.force.com/lightning/o/Food_Selection__c/list?filterName=_Recent'. The page displays a list of food selections under the heading 'Food Selections' and 'Recently Viewed'. The list contains three items:

	Food Selection No
1	FS No-003
2	FS No-002
3	FS No-001

The browser interface includes a search bar, a toolbar with various icons, and a system tray at the bottom showing weather (74°F, mostly cloudy), date (27-09-2024), and time (22:27).

Feedback

The screenshot shows a web browser window with multiple tabs open. The active tab is titled 'Recently Viewed | Feedbacks'. The URL is 'srit-7d4-dev-ed.lightning.force.com/lightning/o/Feedback__c/list?filterName=_Recent'. The page displays a list of feedbacks under the heading 'Feedbacks' and 'Recently Viewed'. The list contains three items:

	Feedback No ↑
1	Fd No-0003
2	Fd No-0002
3	Fd No-0001

The browser interface includes a search bar, a toolbar with various icons, and a system tray at the bottom showing weather (74°F, mostly cloudy), date (27-09-2024), and time (22:27).

Flow

Screenshot of the Flow Builder interface in Salesforce, showing a Record-Triggered Flow for Room Booking.

Flow Details:

- Start:** Record-Triggered Flow
- Object:** Room Booking
- Trigger:** A record is created or updated
- Optimize for:** Actions and Related Records

Flow Structure:

```
graph TD; Start((Start)) --> End((End))
```

Configure Start:

Select Object: Room Booking

Configure Trigger:

*Trigger the Flow When:
 A record is created
 A record is updated
 A record is created or updated
 A record is deleted

Set Entry Conditions:

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements:

74°F Mostly cloudy

Windows Taskbar:

- Search bar
- Icons for various applications (Photoshop, Firefox, etc.)
- System tray: ENG IN, 22:29, 27-09-2024