A CRM Application to Manage the Booking of Co-Living

By

Panchali. Venkata Lakshmi

LIET (A), Vizianagaram , Andhra Pradesh.
Email: venkatalaxmikavyapanchali@gmail.com

ABSTRACT:

This Project proposes a comprehensive Customer Relationship Management (CRM) application tailored for Salesforce to streamline the booking process for co-living spaces. The application aims to enhance *operational efficiency,* improve *customer satisfaction*, and optimize resource utilization within the co-living industry. By leveraging Salesforce's robust platform, the CRM will provide a centralized hub for managing bookings, inquiries, and customer information. Key features include automated workflows, real-time availability tracking, *secure payment integration,* customer relationship management tools, and advanced analytics. The CRM aims to empower co-living operators with data-driven insights and a seamless booking experience, ultimately driving business growth and customer loyalty.Our co-living space concept aspires to provide a lively and welcoming community where people may live, work, and connect with others who share their values. We believe that living in a shared environment promotes collaboration, eliminates loneliness, and improves overall quality of life.The co-living space will have a well planned layout that blends privacy and communal areas. Co-living Space is an application that stores client information so that they can choose from a variety of AC rooms with many sharing options. The user will select special food items on a daily basis and make payments in various means. Also, provide input on services such as room cleaning, internet connection, and food.

Keywords: *operational efficiency, customer satisfaction*, *secure payment integration.*

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SALESFORCE :

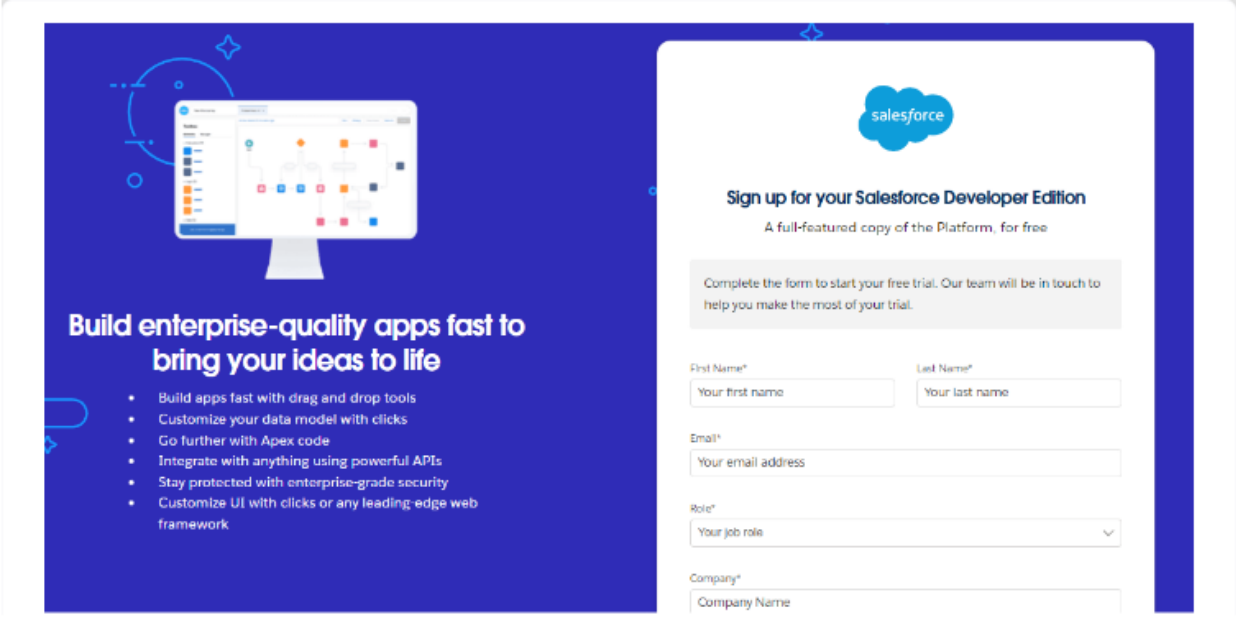
Salesforce is a cloud-based customer relationship management (CRM) platform that enables businesses to connect with customers, partners, and employees in a seamless and intelligent manner. Founded in 1999, Salesforce has grown into a leading CRM solution, empowering sales, marketing, and customer service teams worldwide. With its scalable and secure architecture, Salesforce offers a range of products, including Sales Cloud, Marketing Cloud, Service Cloud, Commerce Cloud, and Community Cloud. These products provide features such as contact and account management, sales force automation, marketing automation, customer service and support, analytics, and reporting. Salesforce caters to various industries, including finance, healthcare, retail, manufacturing, and non-profit, and is suitable for sales teams, marketing teams, customer service teams, IT professionals, and business leaders. The platform leverages cutting-edge technologies like cloud computing, artificial intelligence (AI), machine learning (ML), Internet of Things (IoT), and mobile optimization. With multiple editions – Essentials, Professional, Enterprise, Unlimited, and Developer – Salesforce accommodates businesses of all sizes. Its user-friendly interface and real-time collaboration capabilities enhance customer insights, sales productivity, and personalized customer experiences. As a result, Salesforce has become an indispensable tool for businesses seeking to streamline operations, drive growth, and foster lasting customer relationships, with over $20 billion in revenue as of 2022. Salesforce offers a comprehensive range of features to enhance customer relationships, sales productivity, and business growth. Key features include contact and account management, sales force automation, marketing automation, customer service and support, analytics, and reporting. Salesforce enables lead and opportunity management, sales forecasting, and pipeline analysis. It also provides marketing tools for email marketing, campaign management, and social media integration. Customer service features include case management, self-service portals, and omnichannel support. Additional features include mobile optimization, customization options with Lightning Platform, and integration with external apps through AppExchange. Salesforce also offers advanced analytics with Einstein Analytics, artificial intelligence-powered predictions with Einstein Discovery, and automated workflows with Process Builder.

Setting Up Your Salesforce Developer Playground

To kickstart your Salesforce development journey, you'll need a dedicated environment to experiment and build. This guide will walk you through creating a free Developer Edition org, your personal Salesforce playground.

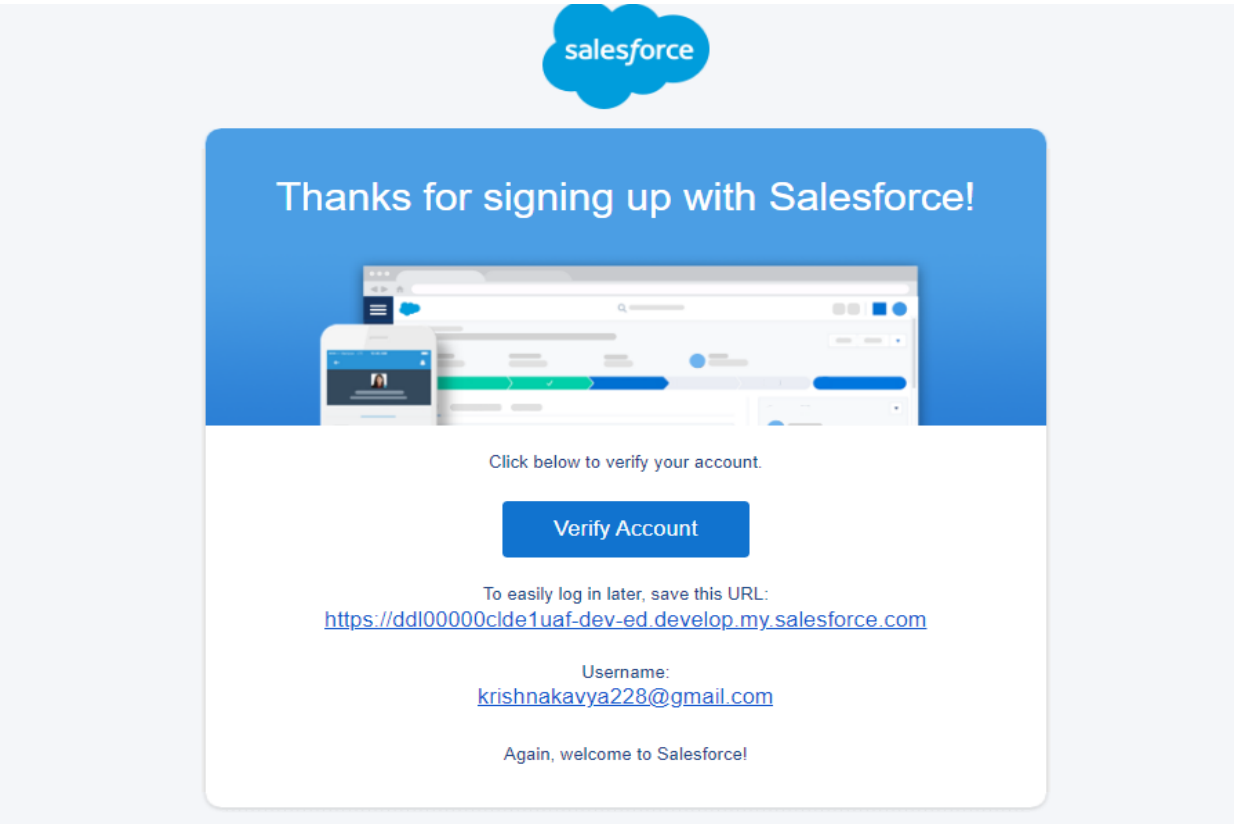
Head over to the Salesforce Developer website: https://developer.salesforce.com/signup.

Here, you'll find a sign-up form. Enter your details, including your first and last name, email address (it can be a non-existent address following the format [email address removed]), and select "Developer" for your role. Under "Company," enter your college name. Choose India as your country and provide your postal code. For the username, create a combination of your name and college name (e.g., johndoe_yourcollege). Once you've filled in all the information, click "Sign Me Up" to proceed. That's it! You'll be on your way to receiving an email confirmation and creating your developer org in no time.



Activating Your Salesforce Developer Org

To access your newly created Salesforce Developer Edition org, you'll need to activate it. Check your inbox for the verification email you received from Salesforce. It might take a few minutes to arrive. Once you locate the email, click on the "Verify Account" link. This will take you to a page where you'll be prompted to create a password for your org. Choose a strong password and provide an answer to the security question. After confirming your password, click "Change Password." Upon successful password creation, you'll be redirected to the Salesforce setup page. This is your starting point for exploring and customizing your developer org.

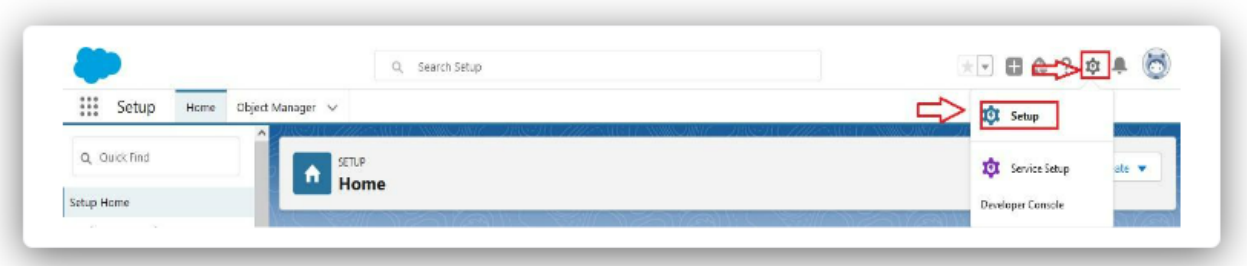


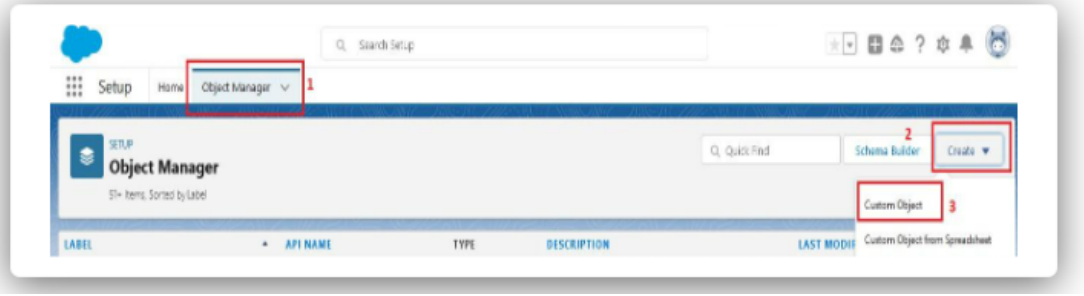
OBJECTS

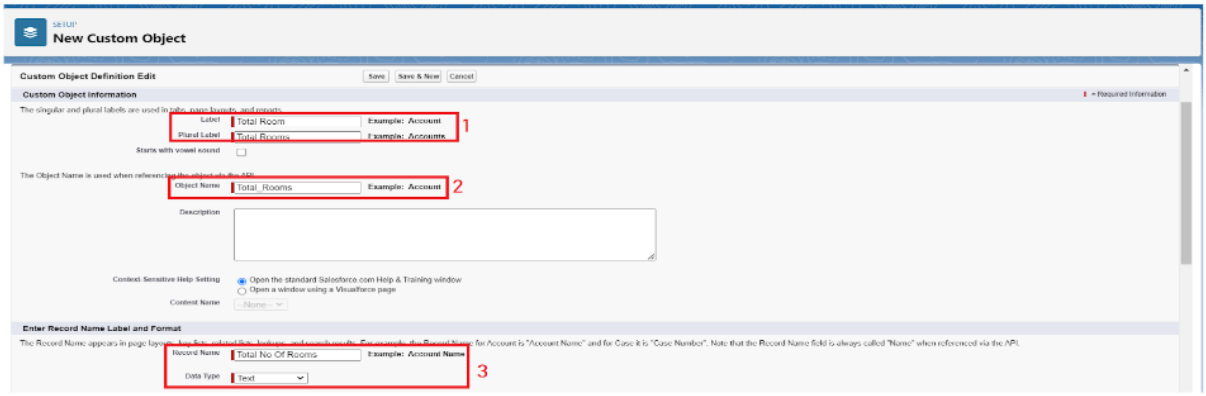
Objects in Salesforce are the building blocks of your data structure. They represent a specific type of data, such as accounts, contacts, opportunities, leads, cases, and custom objects. Each object has fields, which are like columns in a database table, used to store specific information about the object. For example, the "Account" object might have fields like "Name," "Website," "Phone," and "Industry." These fields would be used to store information about individual companies. Objects can be related to each other through relationships, allowing you to connect different types of data. For instance, you could create a relationship between the "Account" and "Contact" objects, so that each contact is associated with a specific account.

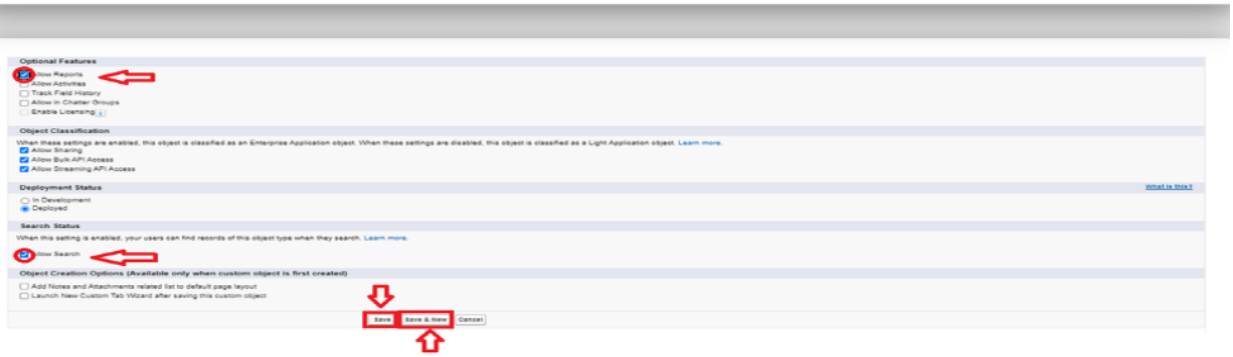
Creating a Custom Object for Total Rooms

To create a custom object named "Total Rooms" in Salesforce, navigate to Setup and click on Object Manager. From there, select "Create" and choose "Custom Object." Enter "Total Room" as the label and "Total Rooms" as the plural label. For the record name, use "Total No Of Rooms." Select "Text" as the data type. In the Optional Features section, enable "Allow Reports" and "Track Field History." Ensure that "Deployed" is selected in the Deployment Status section and "Allow Search" is selected in the Search Status section. Finally, in the Object Creation Options section, choose "Add Notes and Attachments related list to default page layout. "Once you've made these selections, click "Save" to create your custom object. This object will serve as a container for data related to the total number of rooms in your organization, which you can track and report on using Salesforce's reporting and analytics features.









Similarly, In the same way below mentioned objects need to be created.

Creating a Custom Object for Customer

To create a custom object named "Customer1" in Salesforce, navigate to Setup and click on Object Manager. From there, select "Create" and choose "Custom Object." Enter "Customer1" as the label and "Customers" as the plural label. For the record name, use "Customer Name." Select "Text" as the data type. In the Optional Features section, enable "Allow Reports" and "Track Field History." Ensure that "Deployed" is selected in the Deployment Status section and "Allow Search" is selected in the Search Status section. Finally, in the Object Creation Options section, choose "Add Notes and Attachments related list to default page layout." Once you've made these selections, click "Save" to create your custom object. This object will serve as a container for data related to your customers, which you can track and report on using Salesforce's reporting and analytics features.

Creating a custom object for Room Booking

To create a custom object named "Room Booking" in Salesforce, navigate to Setup and click on Object Manager. From there, select "Create" and choose "Custom Object." Enter "Room Booking" as the label and "Room Bookings" as the plural label. For the record name, use "Room No." Select "Auto Number" as the data type. Under Display format, enter "RN-{000}" to automatically generate room numbers in a specific format. Set the starting number to 1. In the Optional Features section, enable "Allow Reports" and "Track Field History." Ensure that "Deployed" is selected in the Deployment Status section and "Allow Search" is selected in the Search Status section. Finally, in the Object Creation Options section, choose "Add Notes and Attachments related list to default page layout. "Once you've made these selections, click "Save" to create your custom object. This object will serve as a container for data related to room bookings, which you can track and report on using Salesforce's reporting and analytics features.

Creating a custom object for Payment

To create a custom object named "Payment1" in Salesforce, navigate to Setup and click on Object Manager. From there, select "Create" and choose "Custom Object." Enter "Payment1" as the label and "Payments" as the plural label. For the record name, use "Payment No." Select "Auto Number" as the data type. Under Display format, enter "PNO-{000}" to automatically generate payment numbers in a specific format. Set the starting number to 1. In the Optional Features section, enable "Allow Reports" and "Track Field History." Ensure that "Deployed" is selected in the Deployment Status section and "Allow Search" is selected in the Search Status section. Finally, in the Object Creation Options section, choose "Add Notes and Attachments related list to default page layout." Once you've made these selections, click "Save" to create your custom object. This object will serve as a container for data related to payments, which you can track and report on using Salesforce's reporting and analytics features.

Creating a custom object for Food Selection

To create a custom object named "Food Selection" in Salesforce, navigate to Setup and click on Object Manager. From there, select "Create" and choose "Custom Object." Enter "Food Selection" as the label and "Food Selections" as the plural label. For the record name, use "Food Selection No." Select "Auto Number" as the data type. Under Display format, enter "FS No-{000}" to automatically generate food selection numbers in a specific format. Set the starting number to 1. In the Optional Features section, enable "Allow Reports" and "Track Field History." Ensure that "Deployed" is selected in the Deployment Status section and "Allow Search" is selected in the Search Status section. Finally, in the Object Creation Options section, choose "Add Notes and Attachments related list to default page layout." Once you've made these selections, click "Save" to create your custom object. This object will serve as a container for data related to food selections, which you can track and report on using Salesforce's reporting and analytics features.

Creating a custom object fo Feedback

To create a custom object named "Feedback" in Salesforce, navigate to Setup and click on Object Manager. From there, select "Create" and choose "Custom Object." Enter "Feedback" as the label and "Feedbacks" as the plural label. For the record name, use "Feedback No." Select "Auto Number" as the data type. Under Display format, enter "Fd No-{0000}" to automatically generate feedback numbers in a specific format. Set the starting number to 1. In the Optional Features section, enable "Allow Reports" and "Track Field History." Ensure that "Deployed" is selected in the Deployment Status section and "Allow Search" is selected in the Search Status section. Finally, in the Object Creation Options section, choose "Add Notes and Attachments related list to default page layout." Once you've made these selections, click "Save" to create your custom object. This object will serve as a container for data related to feedback, which you can track and report on using Salesforce's reporting and analytics features.

TAB

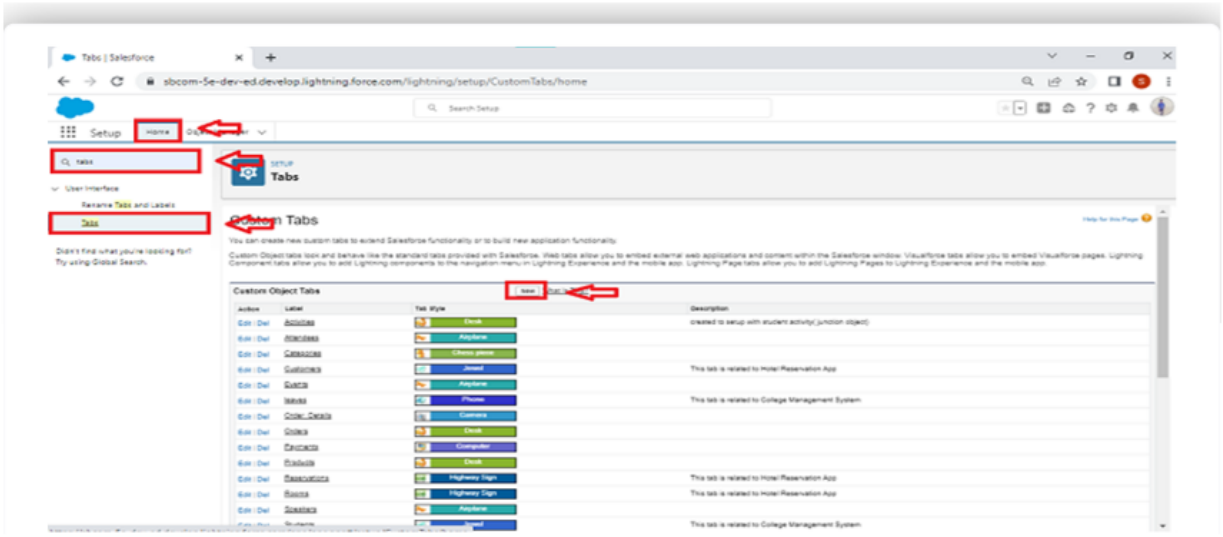
A tab is a user interface that is used to create and view records for objects.

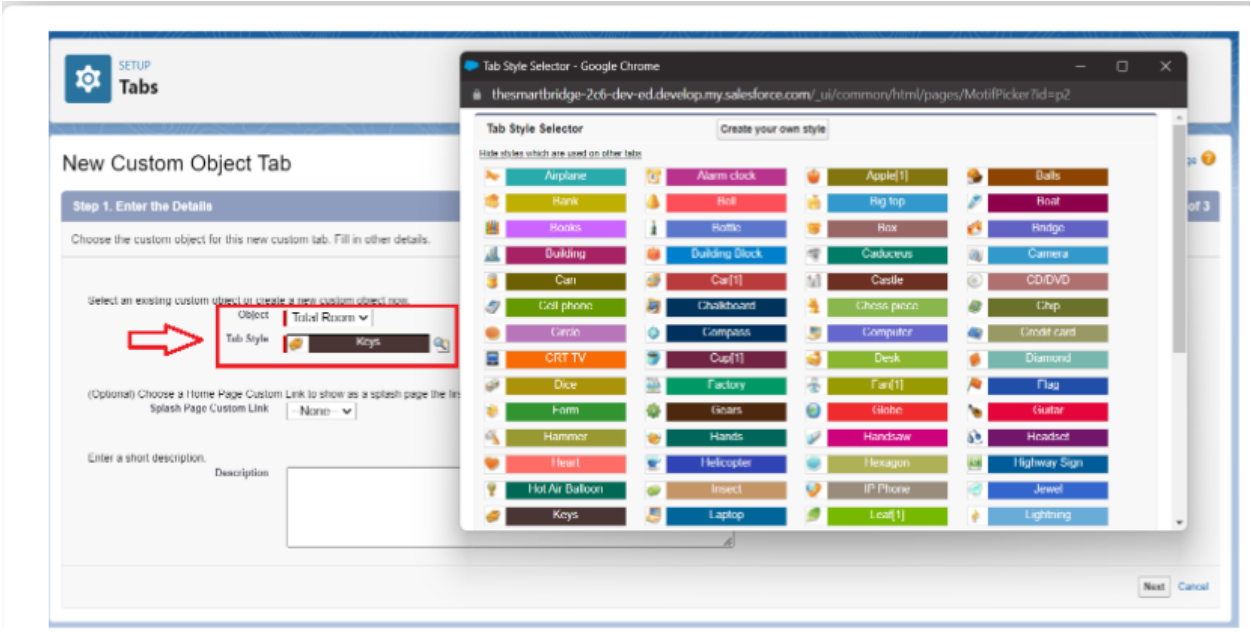
Types of Tabs:

Custom Tabs: Custom object tabs are the user interface for custom apps created in Salesforce.com. They look and perform similarly to conventional Salesforce.com tabs like accounts, contacts, and opportunities.
Web Tabs : Web Tabs are custom tabs that display web material or applications embedded within the Salesforce.com window. Web tabs enable your users to rapidly access material and applications that they commonly use without leaving the Salesforce.com application.

Creating a Tab for Total Rooms

To create a custom object tab in Salesforce, navigate to the Setup page and search for "Tabs" in the Quick Find bar. Click on "Tabs" and then "New" under the "Custom Object Tabs" section. Select the desired object, such as "Total Rooms," and choose the preferred tab style. Proceed to the next step and keep the default settings for "Add to Profiles Page" and "Add to Custom App." Finally, save the changes to create the new custom object tab.





Similarly, In the same way below mentioned Tabs need to be created.

Create a Tab for Customers

To create a "Customers" tab in Salesforce, navigate to the Setup page and search for "Tabs" in the Quick Find bar. Click on "Tabs" and then "New" under the "Custom Object Tabs" section. Select the "Customers" object and choose the desired tab style. Proceed to the next step and keep the default settings for "Add to Profiles Page" and "Add to Custom App." Finally, save the changes to create the "Customers" tab.

Create a Tab for Room Bookings

To create a "Room Bookings" tab in Salesforce, navigate to the Setup page and search for "Tabs" in the Quick Find bar. Click on "Tabs" and then "New" under the "Custom Object Tabs" section. Select the "Room Bookings" object and choose the desired tab style. Proceed to the next step and keep the default settings for "Add to Profiles Page" and "Add to Custom App." Finally, save the changes to create the "Room Bookings" tab.

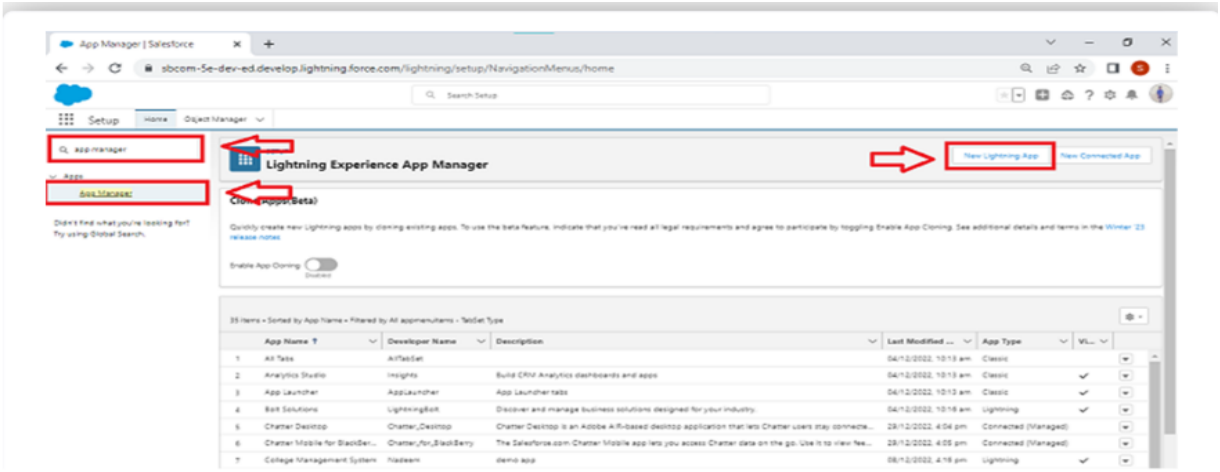
Create a Tab for Remaining Objects

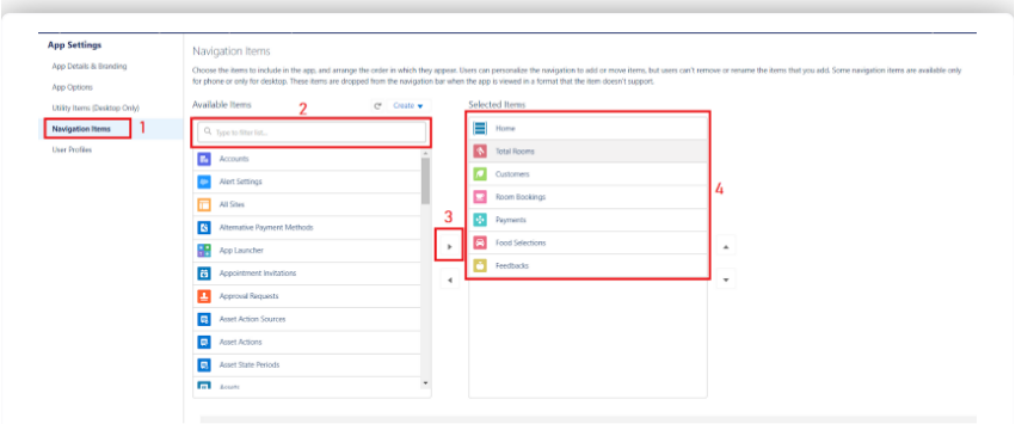
Now create the tabs for Payments, Food Selections, Feedbacks Objects.

THE LIGHTNING APP

Create a Lightning App

To create a new Lightning App in Salesforce, navigate to the Setup page and search for "App Manager" in the Quick Find bar. Select "App Manager" and then click on "New Lightning App." In the App Details and Branding section, enter the desired app name and branding. Proceed to the next steps and keep the default settings for App Options and Utility Items. To add navigation items, use Ctrl to select the desired items (Total Rooms, Customers1, Room Booking, Payments1, Food selection, Feedbacks, Reports, and Dashboards) from the search bar and move them using the arrow button. Finally, to add user profiles, search for the desired profiles (e.g., System Administrator) in the search bar and click on the arrow button to add them to the app. Save and finish to create the new Lightning App.





FIELDS & RELATIONSHIPS

In Salesforce, Fields represent data stored in relational database columns, holding valuable information for specific objects. This facilitates efficient searching, deletion, and editing of records. Salesforce offers two primary Field types:

1. Standard Fields are predefined, performing standard tasks. These fields cannot be deleted unless they are non-required. However, users can delete them from the application. Common Standard Fields across all Salesforce applications include:

Created By, Owner, Last Modified, and fields generated during object creation.

2. Custom Fields offer flexibility, allowing users to modify them according to requirements. These fields are optional and can be added or removed as needed. Users have control over incorporating Custom Fields into records.

Key characteristics of Standard Fields include:

Predefined purpose

Non-deletable (except non-required fields)

Common across all Salesforce applications

Custom Fields are:

Flexible and modifiable

Optional

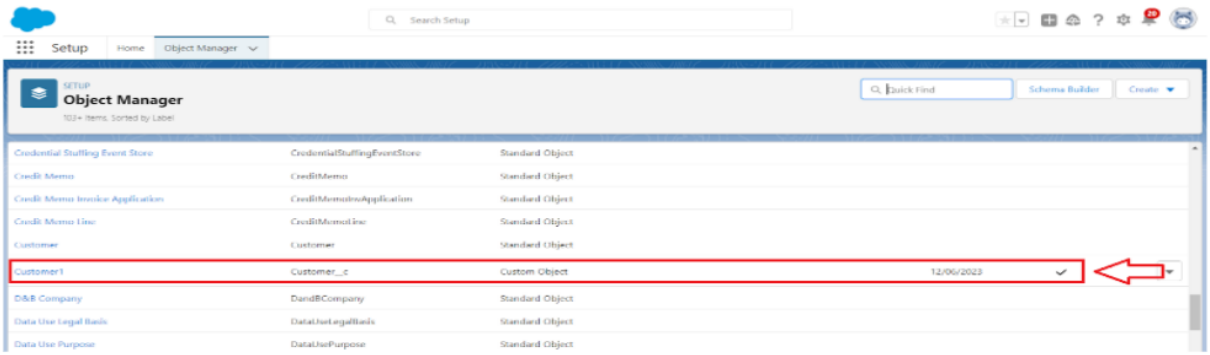
User-controlled

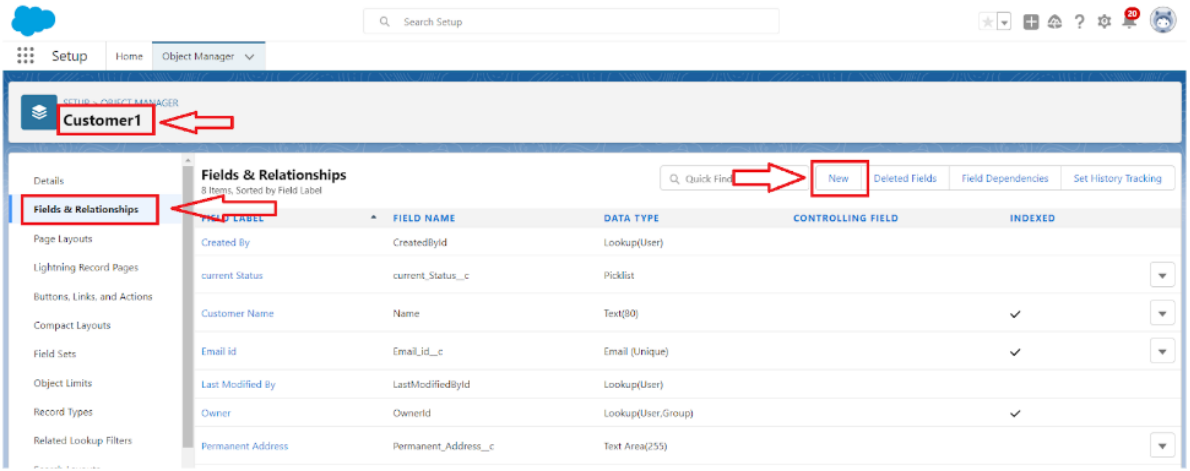
Addable/removable as needed

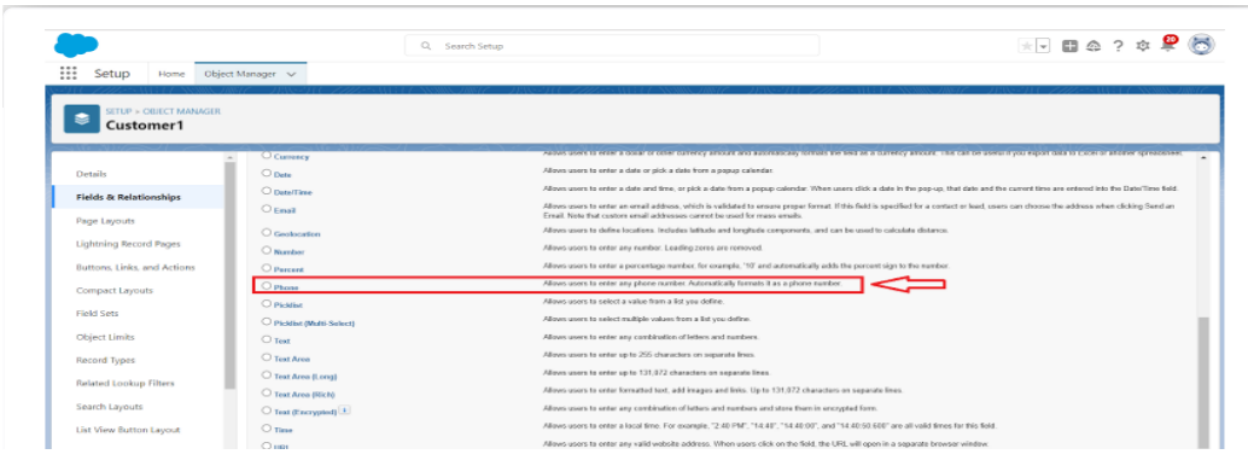
Understanding Standard and Custom Fields enables effective data management and customization in Salesforce, enhancing overall user experience and productivity. Salesforce Fields enable organized data storage, streamlined record management, and tailored solutions for unique business needs.

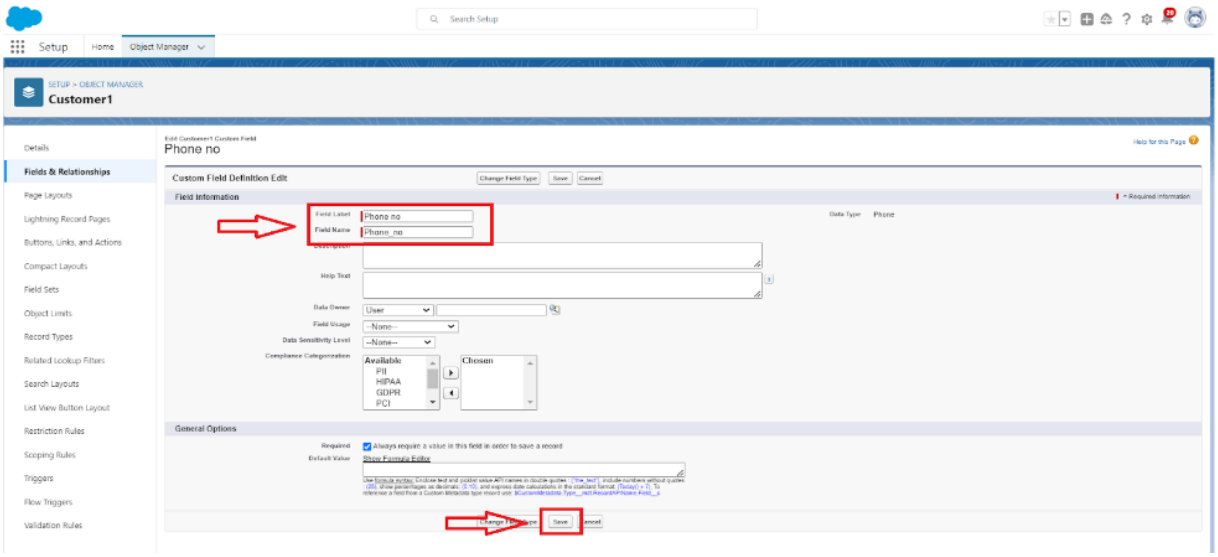
To create fields in the "Customer1" object

In Salesforce, navigate to the Setup page and click on Object Manager. Search for "Customer1" and click on the object. Click on "Fields & Relationships" and then "New." Select the desired data type (e.g., Phone, Email, Text Area, Picklist) and fill in the required information, such as Field Label and Field Name. Click on "Next" and "Save and New" to create the field. Repeat these steps to create additional fields, such as "Phone no," "Email," "Permanent Address," and "Current Status." For the "Current Status" field, select "Picklist" as the data type and enter the desired values (e.g., Student, Employee, Others) with each value separated by a new line.









Similarly, In the same way below mentioned Fields need to be created.

To create fields in the "Room Booking" object

In Salesforce, navigate to the Setup page and click on Object Manager. Search for "Room Booking" and click on the object. Click on "Fields & Relationships" and then "New." Select the desired data type (e.g., Picklist, Master-detail Relationship, Checkbox, Currency, Formula) and fill in the required information, such as Field Label and Field Name. For Picklist fields, enter the desired values separated by new lines. For Master-detail Relationships, select the related object (e.g., Customer1, Total Rooms). For Formula fields, define the formula using the available operators and fields. Click on "Next" and "Save and New" to create the field. Repeat these steps to create additional fields, such as "Room Sharing," "Name," "AC-3000," "Advance Payment for 1 Month," "Amount," "Total No Of Rooms," "Rooms Booked," "Rooms Available," "Check in," and "Check Out."

To create fields and relationships in the "Payment1" object

In Salesforce, navigate to the Setup page and click on Object Manager. Search for "Payment1" and click on the object. Click on "Fields & Relationships" and then "New." Select the desired data type (e.g., Master-detail Relationship, Lookup Relationship, Picklist, Formula) and fill in the required information, such as Field Label and Field Name. For Master-detail Relationships and Lookup Relationships, select the related object (e.g., Customer1, Room Booking). For Picklist fields, enter the desired values separated by new lines. For Formula fields, define the formula using the available operators and fields from related objects. Click on "Next" and "Save and New" to create the field. Repeat these steps to create additional fields and relationships, such as "Name," "Room Booking," "Payment Mode," and the cross-object formula field "Amount." The cross-object formula field allows you to reference the "Amount" field from the related "Room Booking" object.

To create fields and relationships in the "Food Selection" object

In Salesforce, navigate to the Setup page and click on Object Manager. Search for "Food Selection" and click on the object. Click on "Fields & Relationships" and then "New." Select the desired data type (e.g., Master-detail Relationship, Picklist, Field Dependency) and fill in the required information, such as Field Label and Field Name. For Master-detail Relationships, select the related object (e.g., Customer1). For Picklist fields, use global picklist value sets to share values across objects. Create a global picklist value set with the desired options (e.g., Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday). Use field dependencies to create relationships between picklist fields, where the values in one field determine the available values in another field. Create field dependencies for "Breakfast" and "Select Breakfast," "Lunch" and "Select Lunch," and "Dinner" and "Select Dinner" to ensure that the available options for "Select Breakfast," "Select Lunch," and "Select Dinner" depend on the selected values for "Breakfast," "Lunch," and "Dinner," respectively.

To create fields and relationships in the "Feedback" object

In Salesforce, navigate to the Setup page and click on Object Manager. Search for "Feedback" and click on the object. Click on "Fields & Relationships" and then "New." Select the desired data type (e.g., Lookup Relationship, Picklist, Text Area) and fill in the required information, such as Field Label and Field Name. For Lookup Relationships, select the related object (e.g., Customer1). For Picklist fields, enter the desired values separated by new lines. Click on "Next" and "Save and New" to create the field. Repeat these steps to create additional fields, such as "Name," "Roomcleaning," "Internet," "Food," and "Suggestion."

To create a field in the "Total Rooms" object

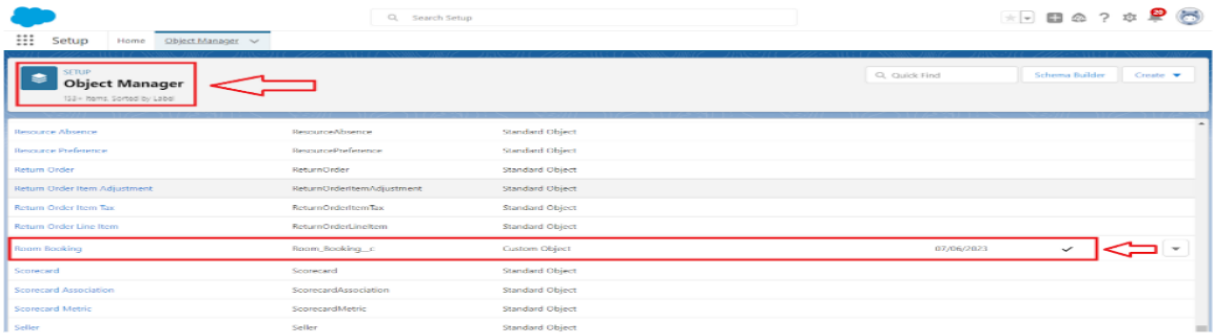
In Salesforce, navigate to the Setup page and click on Object Manager. Search for "Total Rooms" and click on the object. Click on "Fields & Relationships" and then "New." Select "Formula" as the data type and fill in the required information, such as Field Label and Field Name. Select "Number" as the Formula Return Type and "0" as the Decimal places. In the Advanced Formula, enter the formula "30 - Rooms_Booked__c" (assuming "Total No Of Rooms" is 30) and check the syntax. Click on "Next" and "Save and New" to create the field. This field will calculate the number of available rooms by subtracting the number of booked rooms from the total number of rooms.

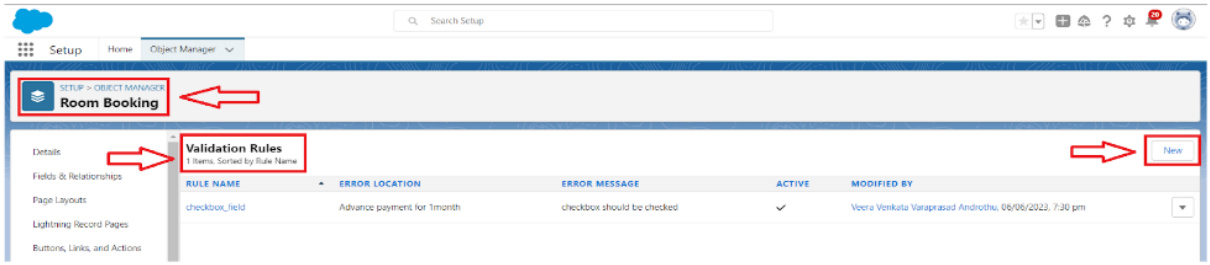
VALIDATIONS

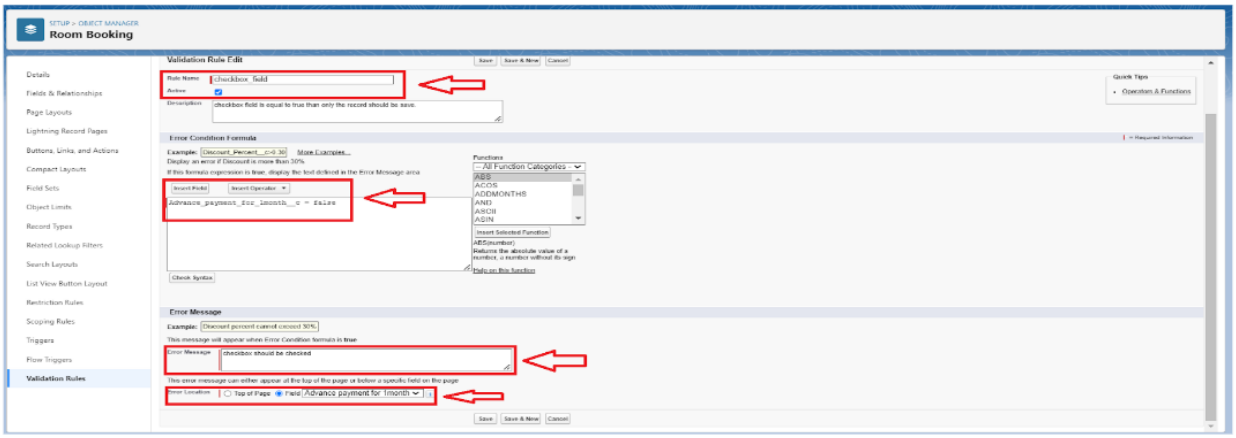
When a user attempts to save a record, validation rules are executed to ensure that the data fits the stated requirements. If the conditions are not met, the validation rule returns an error message and blocks the user from saving the record until the problem is rectified.

To create a validation rule in the "Room Booking" object

In Salesforce, navigate to the Setup page and click on Object Manager. Search for "Room Booking" and click on the object. Click on "Validation Rules" at the top and then "New." Enter a rule name, such as "Checkbox Field," and ensure the validation is active. In the formula box, enter the formula "Advance_payment_for_1month__c = false" and check for syntax errors. Enter an error message, such as "Checkbox should be checked," and select the "Advance payment for 1 month" field as the error location. Click on "Save" to create the validation rule. This rule will ensure that the "Advance payment for 1 month" checkbox is checked before a record can be saved.







Similarly, In the same way below mentioned Validations need to be created.

To create another validation rule in the "Room Booking" object

In Salesforce, navigate to the Setup page and click on Object Manager. Search for "Room Booking" and click on the object. Click on "Validation Rules" at the top and then "New." Enter a rule name, such as "Check in Rule," and ensure the validation is active. In the formula box, enter the formula "Check_in__c = False" and check for syntax errors. Enter an error message, such as "Check box should be checked," and select the "Check in" field as the error location. Click on "Save" to create the validation rule. This rule will ensure that the "Check in" checkbox is checked before a record can be saved.

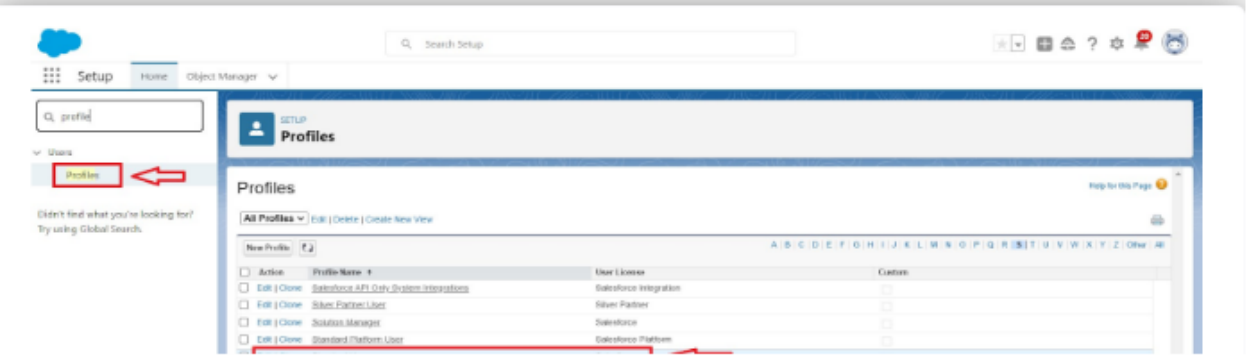
PROFILE

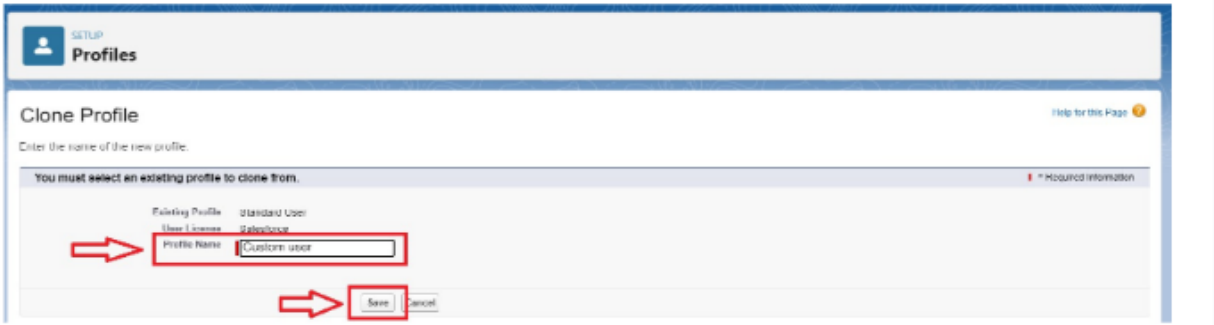
A profile is a set of settings and permissions that determine what a person may accomplish in Salesforce. Profile settings include "object permissions, field permissions, user permissions, tab settings, app settings, apex class access, visualforce page access, page layouts, record types, login hours, and login IP ranges." You can define profiles based on the user's job role. For example, System Administrator, Developer, and Sales Representative.
Salesforce profile types include:

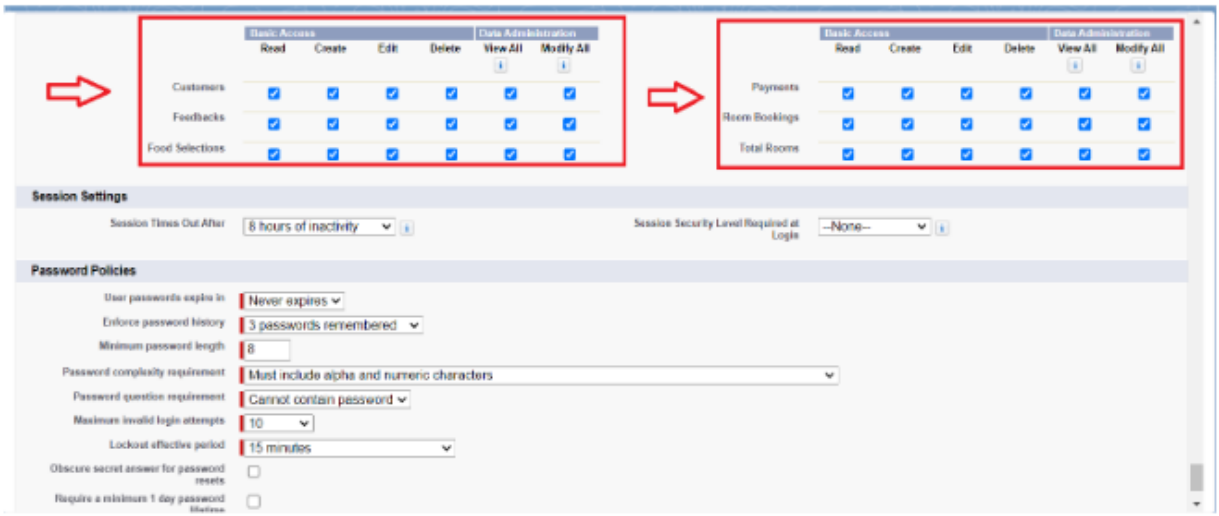
1. Standard profiles.
By default, Salesforce provides profiles that are below standard.
Contract Manager
Read Only
Marketing User
Solution Manager
Standard User
System Administrator.
We cannot delete the regular ones. Each of these basic ones comes with a default set of permissions for all standard objects on the platform.
2. Customized Profiles:
Custom ones defined by us. They can be erased if no users are assigned to them.

To create a new profile

In Salesforce, navigate to the Setup page and search for "Profiles" in the Quick Find bar. Click on "Profiles" and clone the desired profile (e.g., Standard User). Enter a new profile name (e.g., Custom User) and save it. While still on the profile page, click "Edit" and scroll down to "Custom Object Permissions." Grant all access permissions for the desired objects (e.g., Customers, Feedbacks, Food Selections, Payments, Room Bookings, Total Rooms). Scroll down and click "Save" to create the new profile with the specified permissions.







Similarly, In the same way below mentioned Profiles need to be created.

To create a new profile for a custom platform user 1

Navigate to the Setup page and search for "Profiles" in the Quick Find bar. Click on "Profiles" and clone the desired profile (e.g., Standard Platform User). Enter a new profile name (e.g., Custom Platform User1) and save it. While still on the profile page, click "Edit" and scroll down to "Custom Object Permissions." Grant only "Read" access permissions for the desired objects (e.g., Customers, Feedbacks, Food Selections, Payments, Room Bookings, Total Rooms). Scroll down and click "Save" to create the new profile with the specified permissions. This will restrict the custom platform user's access to only view the data in these objects.

To create a new profile for a custom platform user 2

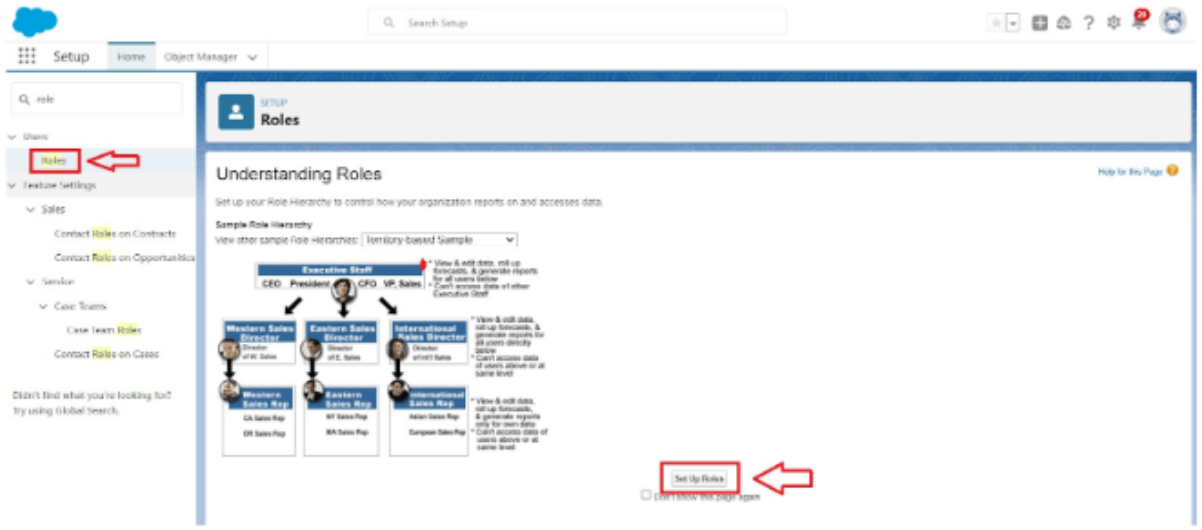
With broader access, navigate to the Setup page and search for "Profiles" in the Quick Find bar. Click on "Profiles" and clone the desired profile (e.g., Standard Platform User). Enter a new profile name (e.g., Custom Platform User2) and save it. While still on the profile page, click "Edit" and scroll down to "Custom Object Permissions." Grant "Create," "Read," "Edit," and "Delete" access permissions for the objects "Customers," "Feedbacks," "Food Selections," "Payments," and "Room Bookings." Grant only "Read" access permission for the "Total Rooms" object. Scroll down and click "Save" to create the new profile with the specified permissions. This will allow the custom platform user to create, read, edit, and delete data in the specified objects, while only allowing them to view the "Total Rooms" data.

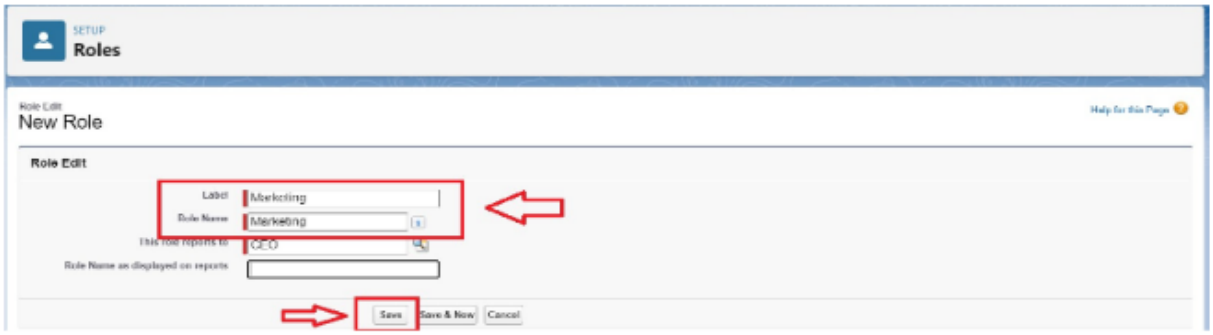
ROLES

A role in Salesforce specifies a user's visibility access at the record level. Roles can be used to define the sorts of data access that users in your Salesforce organization have. Simply defined, it outlines what a user may see within the Salesforce organization.

To create a new role named "Marketing"

Under the "CEO" role in Salesforce, navigate to the Setup page and search for "Roles" in the Quick Find bar. Click on "Set Up Roles" and expand all roles. Click on "Add Role" under the "CEO" role. Enter "Marketing" as the Label, and the Role Name will be auto-populated. Click on "Save" to create the new role.





Similarly, In the same way below mentioned Roles need to be created.

To create a new role named "Receptionist"

Under the "CEO" role in Salesforce, navigate to the Setup page and search for "Roles" in the Quick Find bar. Click on "Set Up Roles" and expand all roles. Click on "Add Role" under the "CEO" role. Enter "Receptionist" as the Label, and the Role Name will be auto-

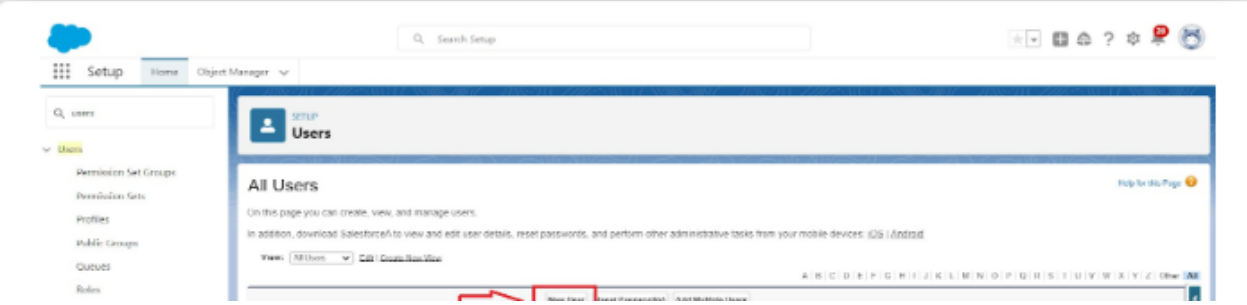
populated. Click on "Save" to create the new role.

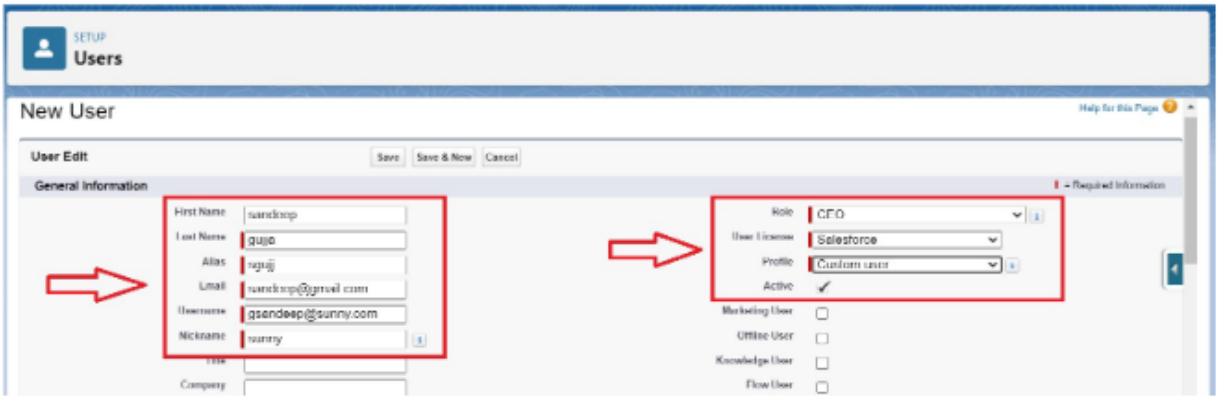
USERS

A user is somebody who logs into Salesforce. Employees that require access to your company's records are known as users. Every Salesforce user has a user account. The user account identifies the user, whereas the user account settings specify which features and records the user can access.

To add a new user

With the "Custom User" profile, navigate to Setup, search for "Users," and select "New User." Fill in details like Sandeep Gujja for name, a preferred alias (optional), personal email (not ideal for production), and a unique "text@text.com" username. Optionally, provide a nickname. Under "Login Access," choose "CEO" role, "Salesforce" user license, and "Custom User" profile. Click "Save" to create the user. Remember: avoid personal email addresses for usernames in production environments.





Similarly, In the same way below mentioned User need to be created.

To create a new user

In Salesforce, navigate to Setup, search for "Users," and click "New User." Fill in the required fields, including first name, last name, alias, email, username, nickname, role, user license, and profile. Ensure the username follows the "text@text.com" format. For this example, you would enter Abhilash Garapati, an alias, their personal email, a suitable username, a nickname, the Marketing role, the Salesforce Platform license, and the Custom Platform User1 profile. After reviewing the details, click "Save" to finalize the user creation process.

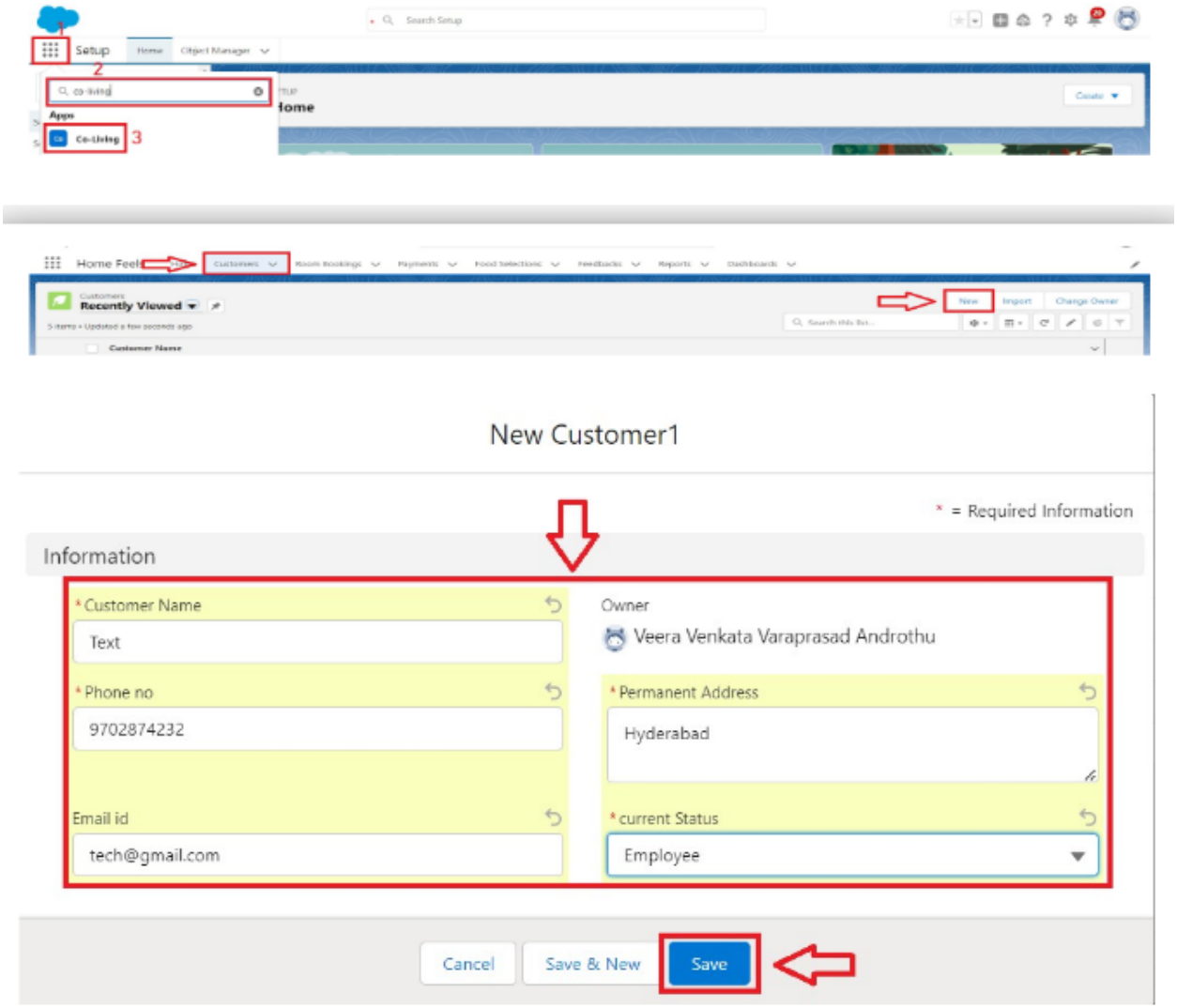
To create a new receptionist user

In Salesforce, navigate to Setup, search for "Users," and click "New User." Fill in the required details like Ganesh Gelli for name, an optional alias, personal email, and a unique "text@text.com" username. Assign the "Receptionist" role, "Salesforce Platform" license, and "Custom Platform user2" profile. Click "Save" to create the user. Ensure the user receives a notification with their login credentials.

USER ADOPTION

To create a new customer record

In the Home Feels application, begin by launching the application from your Salesforce dashboard. Once the application is open, locate and click on the "Customers" tab. This will take you to the customer records page. To create a new record, click on the "New" button. A new customer record form will appear, prompting you to enter relevant details such as the customer's name, contact information, and preferences. After filling in the necessary information, save the record by clicking the "Save" button. This will create a new customer record in the Home Feels system, allowing you to track and manage interactions with that customer.



Similarly, In the same way mentioned below Customer records need to be created.

To view the details of a specific customer

In the Home Feels application, start by launching the application from your Salesforce dashboard. Once the application is open, locate and click on the "Customers" tab. This will display a list of all customer records. To view the details of a particular customer, simply click on their name. A new page will open, providing a comprehensive view of the customer's information, including their contact details, preferences, and any associated interactions. This allows you to easily access and review customer data whenever needed.

To delete a customer record

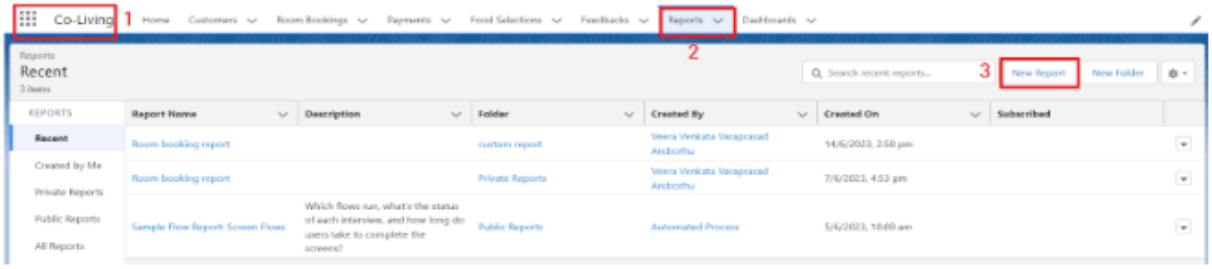
In the Home Feels application, begin by launching the application from your Salesforce dashboard. Once the application is open, locate and click on the "Customers" tab. This will display a list of all customer records. To delete a specific customer, locate their record and click on the arrow icon located on the right-hand side of the record. A menu will appear, allowing you to select the "Delete" option. Confirm the deletion by clicking "Delete" again. This will permanently remove the customer record from the Home Feels system.

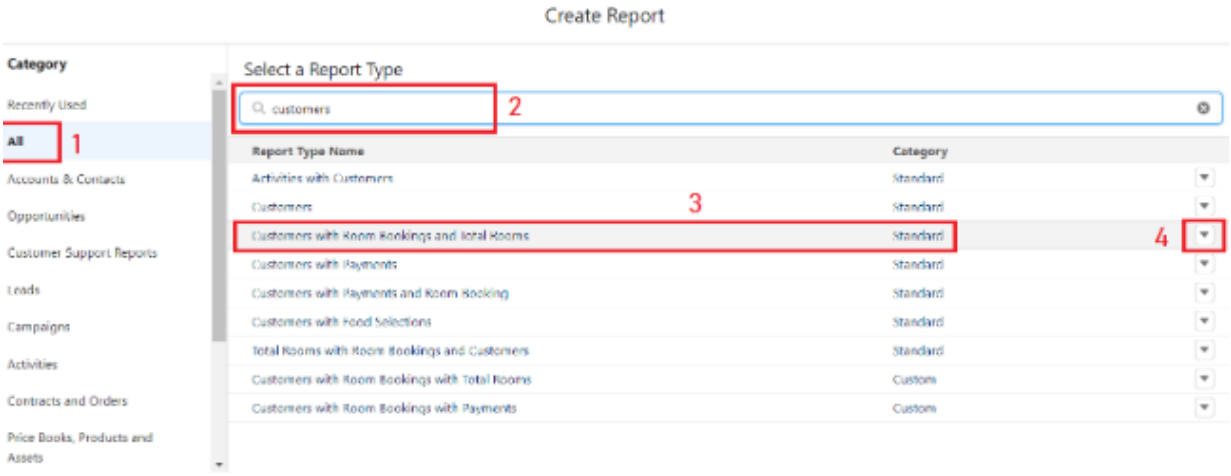
REPORTS

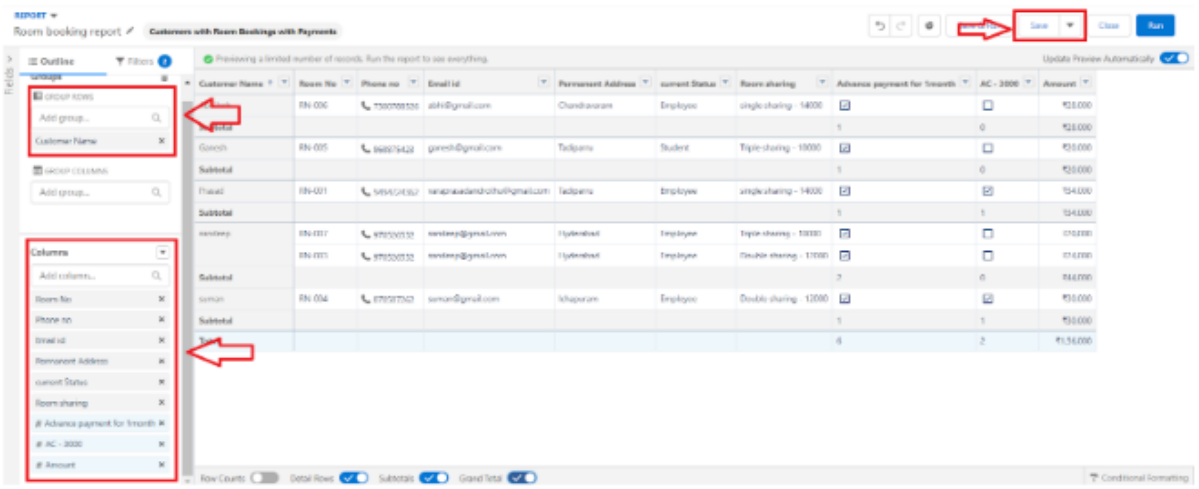
Reports provide a powerful tool for analyzing and visualizing your Salesforce data. By combining and organizing your data in various formats, reports offer valuable insights into your business operations. Before creating and sharing reports, familiarize yourself with the different types available. Tabular reports present data in a simple table format, while summary reports summarize data into groups or categories. Matrix reports combine tabular and summary reports to provide a more complex view. Joined reports merge data from multiple objects to offer a comprehensive analysis. By understanding these report types, you can effectively leverage Salesforce reporting capabilities to make informed decisions and gain valuable insights.

To create a custom report

In Salesforce, start by navigating to the "Reports" tab within the desired application. Once there, click on the "New Report" button. This will open the report builder interface. From here, you can select the appropriate report type from the available categories or search for a specific report type using the search panel. For example, to create a report showing customers with room bookings and the total number of rooms, you would search for "Customers with Room Bookings with Total Rooms" and click "Start Report." Once you've selected the report type, you can customize the report by adding relevant fields from the left pane. These fields represent the data you want to include in your report. After making your customizations, you can save the report for future use or run it immediately to view the generated results.







Similarly, In the same way mentioned below Reports need to be created.

To create another custom report

In Salesforce, follow the same steps as before. Begin by navigating to the "Reports" tab within the desired application and clicking "New Report." From there, select the appropriate report type, such as "Customers with Room Bookings with Payments." This

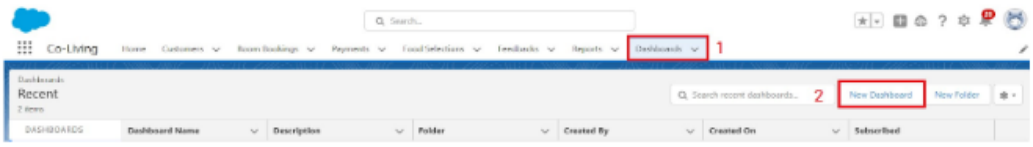
will allow you to analyze customer data related to room bookings and associated payments. Once you've selected the report type, customize the report by adding relevant fields from the left pane, such as customer information, booking details, and payment data. After making your customizations, save the report or run it immediately to view the generated results. This second report will provide valuable insights into customer behavior and financial transactions related to room bookings.

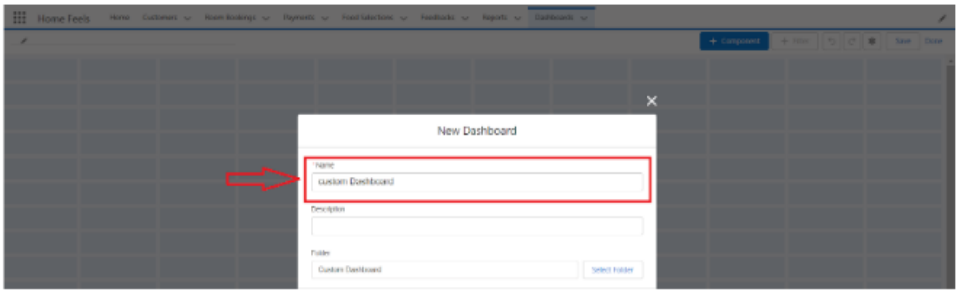
DASHBOARD

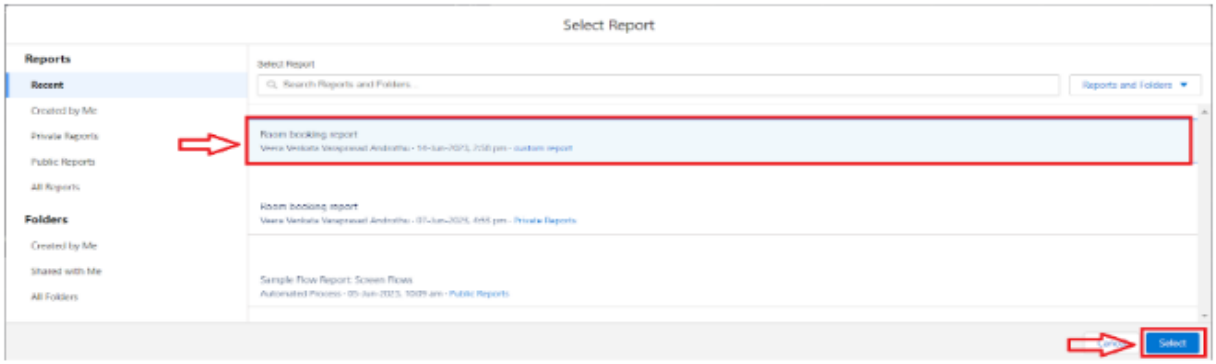
Dashboards offer a powerful way to visually interpret and analyze your Salesforce data. By presenting information in a clear and concise format, dashboards help you identify trends, measure performance, and make data-driven decisions. Before creating and sharing dashboards, familiarize yourself with the basics. Dashboards are built using reports, which provide the underlying data. By combining multiple reports on a single dashboard, you can gain a comprehensive view of your business metrics. Dashboards can be customized to display information in various formats, such as charts, graphs, and tables. This flexibility allows you to tailor dashboards to your specific needs and preferences, ensuring that you can effectively track and analyze key performance indicators.

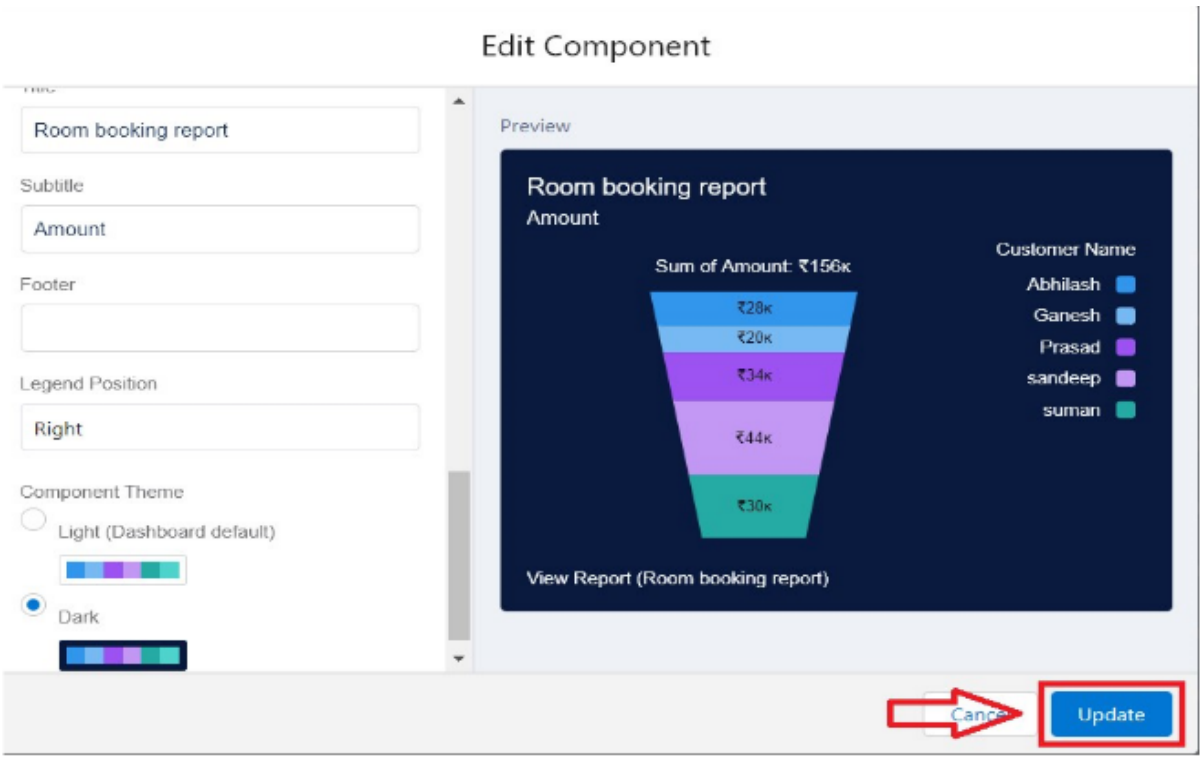
To create a custom dashboard

In Salesforce, start by navigating to the "Dashboards" tab within the desired application. Once there, click on the "New Dashboard" button. This will open the dashboard builder interface. Give your dashboard a meaningful name and click "Create." To add components to your dashboard, select the "Add Component" button. From the available options, choose a report that you want to include on the dashboard. For example, select the "Customers with Room Bookings" report. Click "Select" to add the report to your dashboard. After adding the report, click "Add" to finalize the component. Once you've added all desired components, click "Save" and then "Done" to complete the dashboard creation process. Your new dashboard will now be available for viewing and analyzing your Salesforce data in a visual format.









Similarly, In the same waymentioned below Custom Dashboard need to be created.

To create another custom dashboard

In Salesforce, follow the same steps as before. Begin by navigating to the "Dashboards" tab and clicking "New Dashboard." Give your new dashboard a unique name and click "Create." To add components to your dashboard, select the "Add Component" button. Choose the "Customers with Room Bookings with Payments" report from the available options and click "Select." This report will provide insights into customer bookings and associated payments. After adding the report, click "Add" to finalize the component. Once you've added all desired components, click "Save" and then "Done" to complete the dashboard creation process. Your second dashboard will now be available for viewing and analyzing your Salesforce data related to customer bookings and payments.

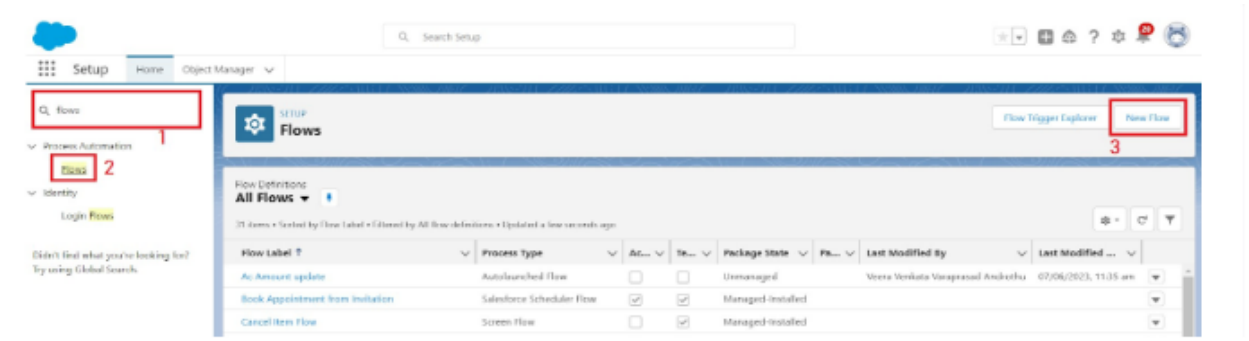
FLOWS

Salesforce flows are versatile tools that automate business processes, collect and update data, and guide users through interactive steps. Built with a visual interface, flows can be created without coding. One common use case for flows is to automate calculations or generate data based on user input. For example, you can create a flow that automatically populates the "Amount" field based on the selected "Room sharing" and "Ac" fields. This eliminates manual data entry and ensures accuracy in your records. By automating such processes, flows can improve efficiency, reduce errors, and enhance the overall user experience within your Salesforce environment.

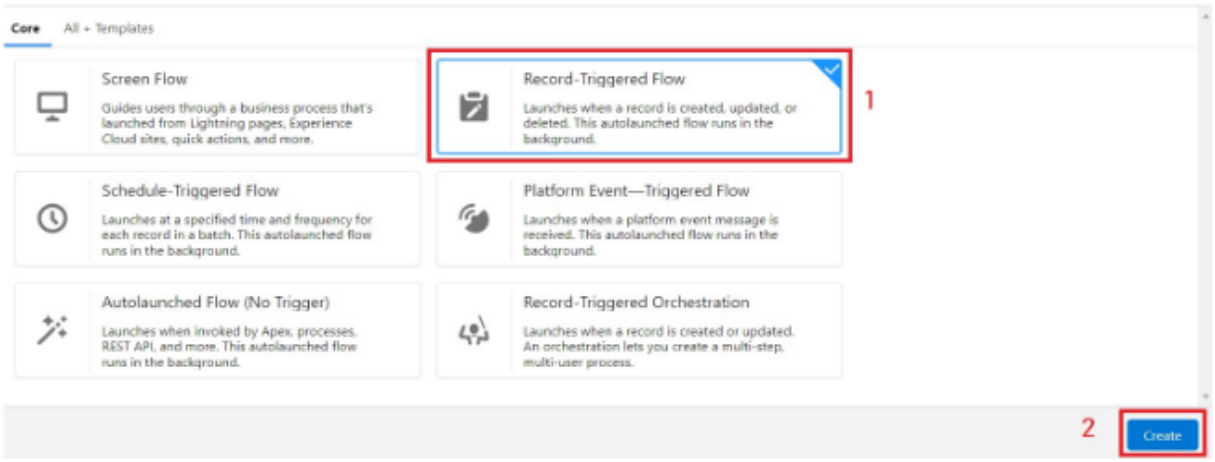
To create a flow

In Salesforce, navigate to Setup, type "Flow" in the quick find box, and select "Flow." Then, click on "New Flow" and choose "Record-triggered flow." Select "Room Booking" as the object and set the trigger to "A record is Created or Updated." Optimize the flow for "Actions and Related Records" and click "Done." Next, add a Decision Element by clicking the "+" symbol. Label the field "Update" and let the API name generate automatically. Configure the outcome details for single, double, and triple sharing, as well as single, double, and triple AC, using the Room sharing and AC-3000 fields. For each outcome, add conditions using the "Add Condition" button. Set the resource, operator, and value accordingly. Once all conditions are added, click "Done."
Under each outcome, add an "Update Records" element. Label each update record (e.g., Single, Double, Triple, Single AC1, Double AC1, Triple AC1) and set the Amount field

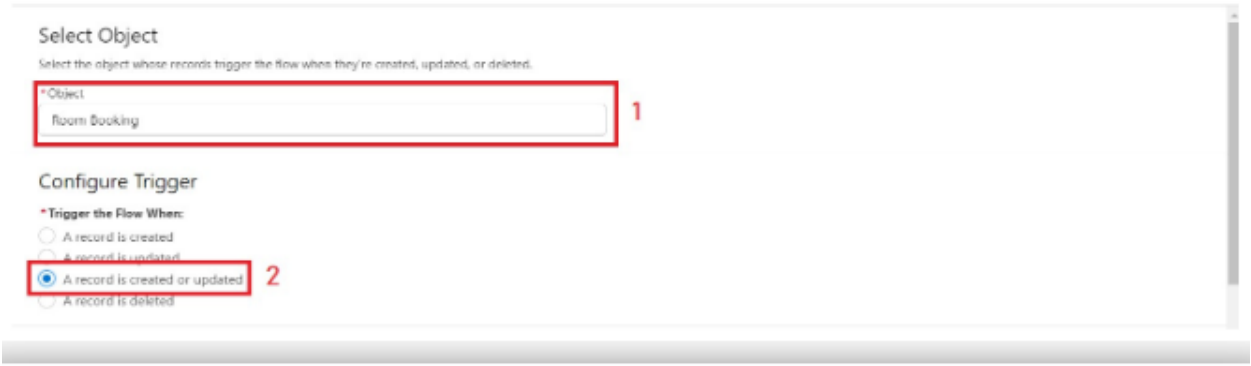
value accordingly (28000, 24000, 20000, 34000, 30000, 26000). After configuring all update records, the flow will take shape. Click "Save" and label the flow "Update Amount Field." The API name will generate automatically. Click "Save" to finalize the flow creation. This flow updates the Amount field in Room Booking records based on sharing and AC preferences, automating pricing logic and streamlining booking processes.

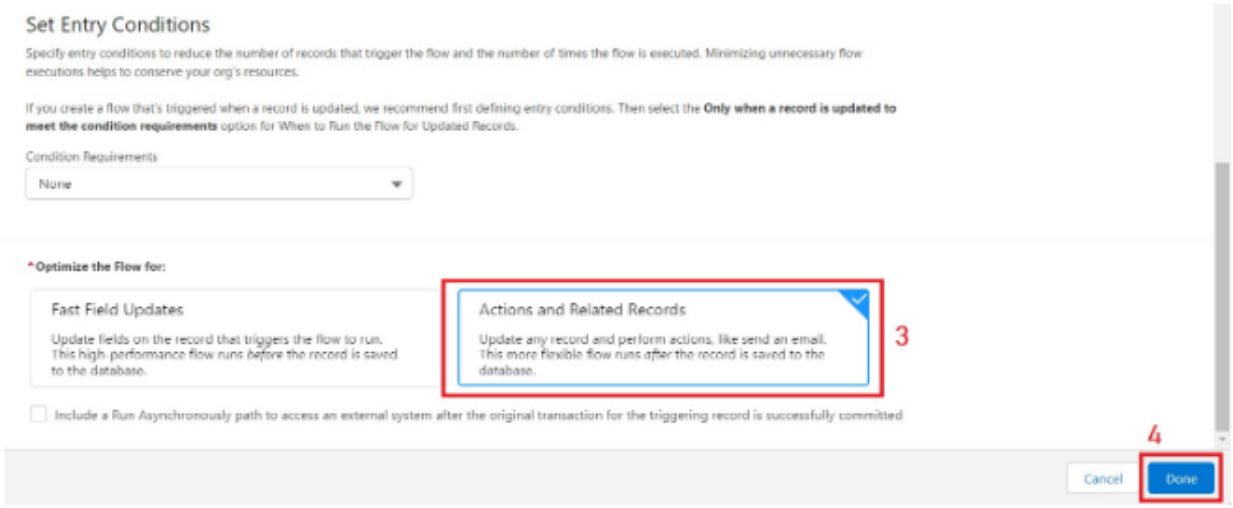


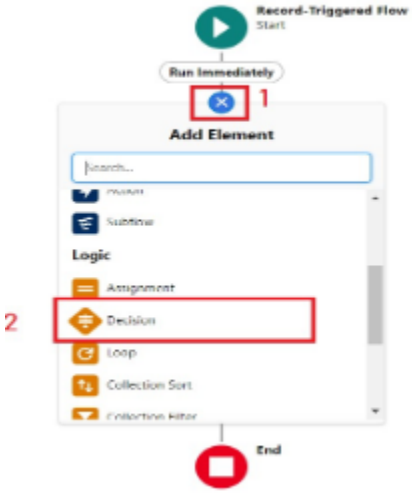
New Flow

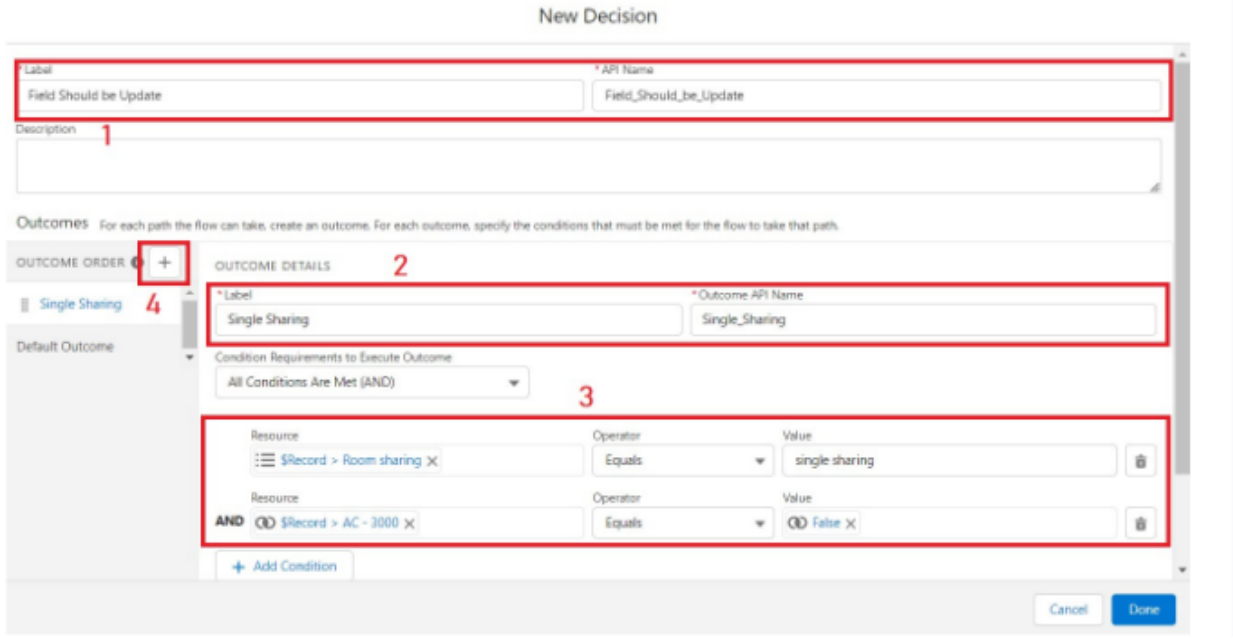


Configure Start

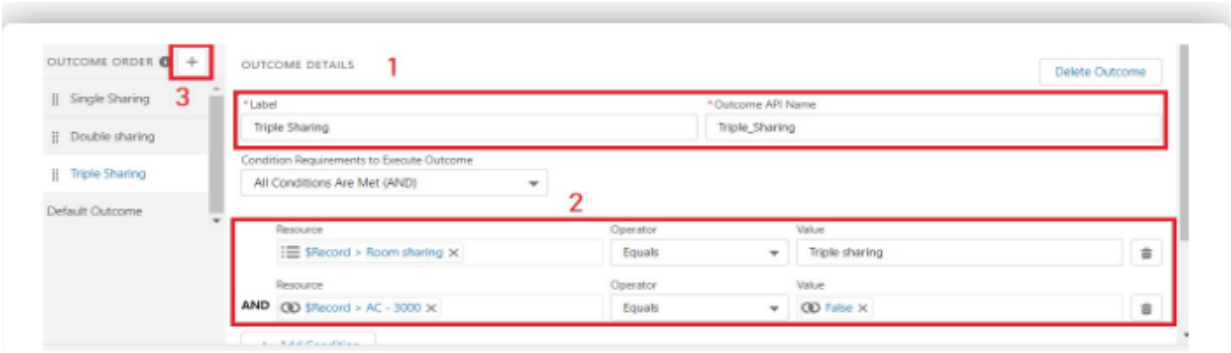


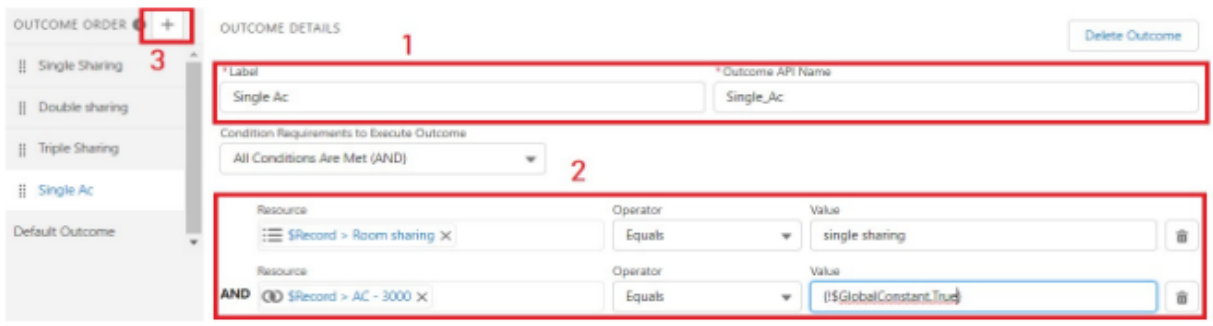

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend 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
None
*Optimize the Flow for:
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.
Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.
3
Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed
4
Cancel
Done

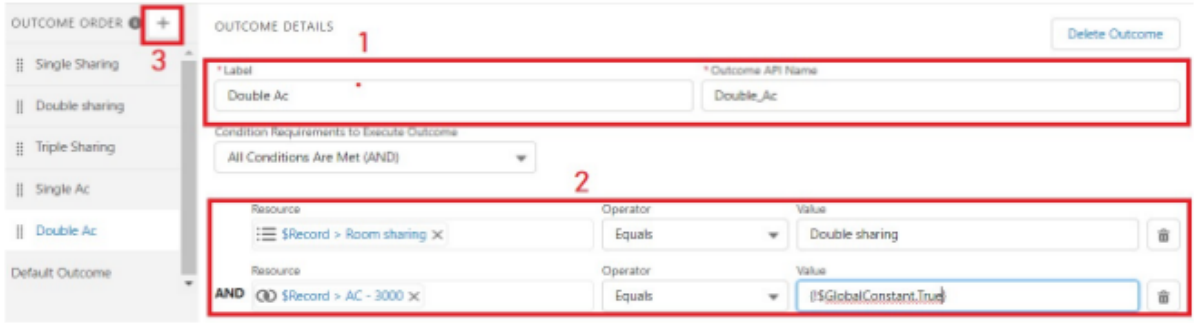

Record-Triggered Flow
Start
Run Immediately
1
Add Element
Search...
Subflow
Logic
Assignment
2
Decision
Loop
Collection Sort
End

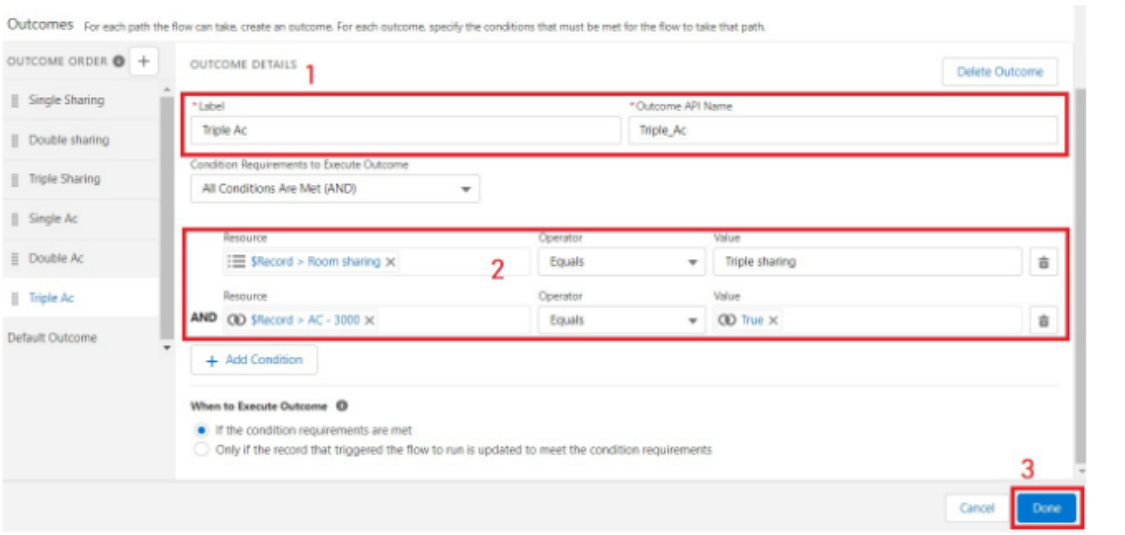

New Decision
*Label
Field Should be Update
*API Name
Field_Should_be_Update
Description
1
Outcomes
For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
OUTCOME ORDER
OUTCOME DETAILS
2
Single Sharing
4
Default Outcome
*Label
Single Sharing
*Outcome API Name
Single_Sharing
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
Add Condition
Cancel
Done

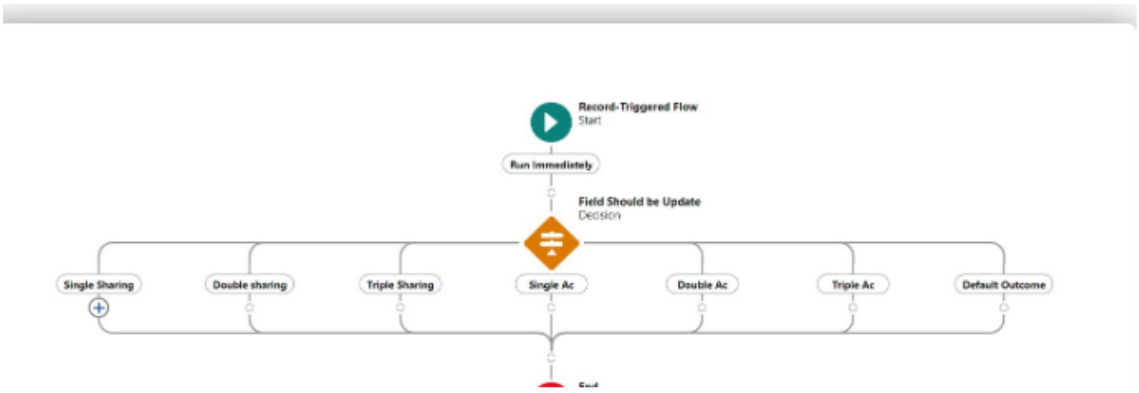

OUTCOME ORDER
Single Sharing
Double sharing
Default Outcome
3
OUTCOME DETAILS
1
Delete Outcome
*Label
Double sharing
*Outcome API Name
Double_sharing
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
2
Resource
Operator
Value
$Record > Room sharing
Equals
Double sharing
AND
$Record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

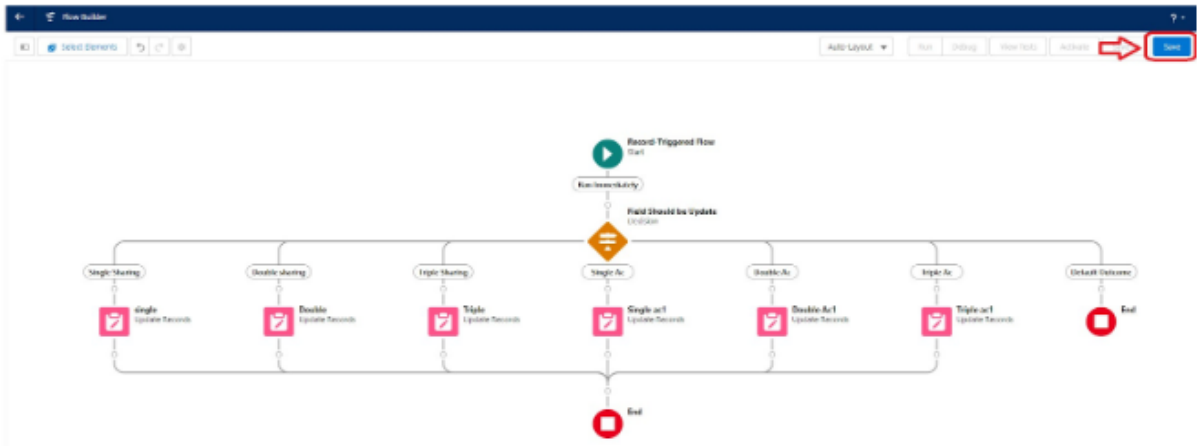

OUTCOME ORDER
Single Sharing
Double sharing
Triple Sharing
Default Outcome
3
OUTCOME DETAILS
1
Delete Outcome
*Label
Triple Sharing
*Outcome API Name
Triple_Sharing
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
2
Resource
Operator
Value
$Record > Room sharing
Equals
Triple sharing
AND
$Record > AC - 3000
Equals
False

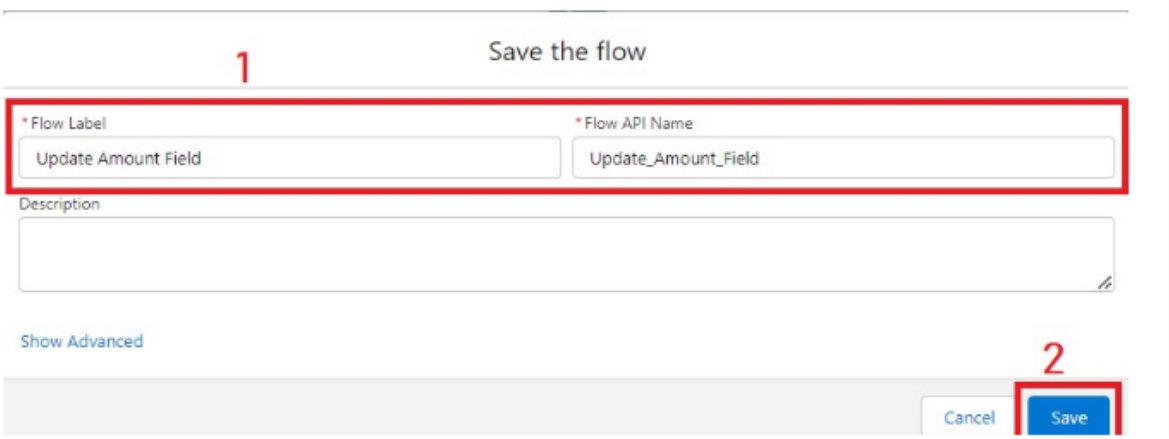

OUTCOME ORDER
Single Sharing
Double sharing
Triple Sharing
Single Ac
Default Outcome
3
OUTCOME DETAILS
1
Delete Outcome
*Label
Single Ac
*Outcome API Name
Single_Ac
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
2
Resource
Operator
Value
$Record > Room sharing
Equals
single sharing
AND
$Record > AC - 3000
Equals
{!$GlobalConstant.True}


OUTCOME ORDER
Single Sharing
Double sharing
Triple Sharing
Single Ac
Double Ac
Default Outcome
3
OUTCOME DETAILS
1
Delete Outcome
*Label
Double Ac
*Outcome API Name
Double_Ac
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
2
Resource
Operator
Value
$Record > Room sharing
Equals
Double sharing
AND
$Record > AC - 3000
Equals
{!$GlobalConstant.True}


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
Single Sharing
Double sharing
Triple Sharing
Single Ac
Double Ac
Triple Ac
Default Outcome
OUTCOME DETAILS
1
Delete Outcome
*Label
Triple Ac
*Outcome API Name
Triple_Ac
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
Resource
Operator
Value
$Record > Room sharing
2
Equals
Triple sharing
AND
$Record > AC - 3000
Equals
True
Add Condition
When to Execute Outcome
If the condition requirements are met
Only if the record that triggered the flow to run is updated to meet the condition requirements
3
Cancel
Done


Record-Triggered Flow
Start
Run immediately
Field Should be Update
Decision
Single Sharing
Double sharing
Triple Sharing
Single Ac
Double Ac
Triple Ac
Default Outcome

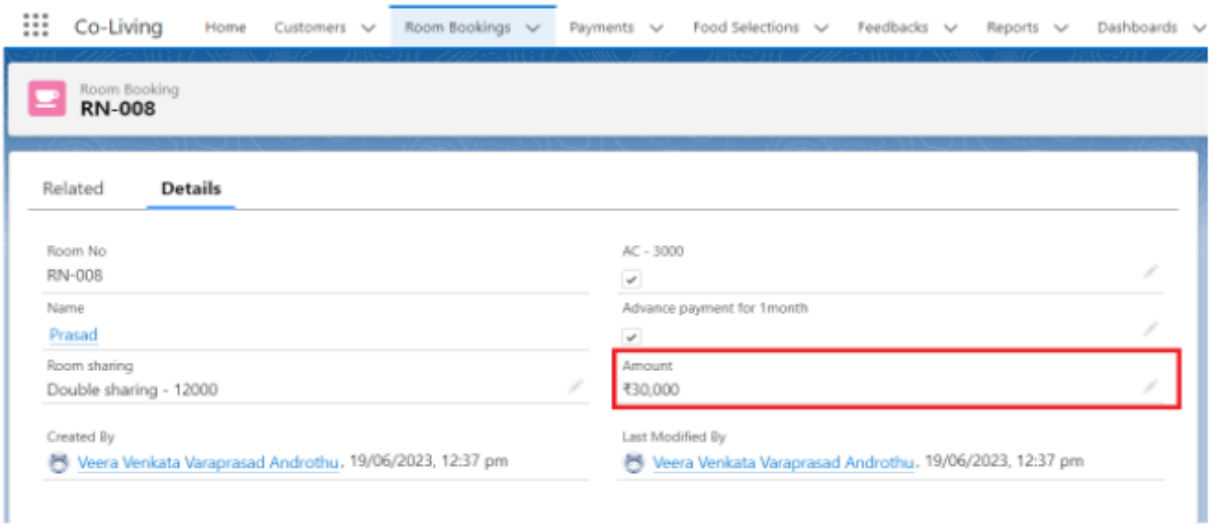

Auto-Layout
Save



Similarly, In the same way mentioned below flow need to be tested.

Testing the Flow

To test the "Update Amount Field" flow, navigate to the Co-living app, select "Room Sharing," and click "New." Enter details like Name, Room Sharing, AC-3000, and Advance Payment. The Amount field should be empty initially. Upon saving, the flow updates the Amount based on selected options. Verify the calculated Amount against expected values (e.g., Single Sharing with AC-3000 should be 34000). Successful testing confirms the flow's accuracy in automating pricing for co-living room bookings.



CONCLUSION

This comprehensive document serves dual purposes, providing invaluable insights into Salesforce's user management capabilities and introducing an innovative co-living space management application. The initial section presents a step-by-step guide on creating a new user with the "Custom User" profile in Salesforce, highlighting the crucial importance of secure and unique usernames. This process ensures that each user has distinct access permissions, maintaining data integrity and confidentiality. The guide walks administrators through the process of navigating to Setup, typing "Users" in the quick find box, selecting "Users," and clicking "New User." It then outlines the necessary information to fill in, including first name, last name, alias, email, username, and nickname. Assigning the correct role and permissions is also emphasized, with a focus on the "Custom User" profile. The second half of this document shifts focus to a bespoke co-living space management application, designed to revolutionize the way shared living environments operate. This cutting-edge CRM system streamlines essential processes such as bookings, room selection with various sharing options, meal plans, and service feedback for residents. By leveraging Salesforce's robust features, this application enhances resident experiences, optimizes occupancy rates, and fosters a sense of community. Key features of the co-living space management application includes room booking and management, customizable meal plans, service feedback and rating system, automated payment processing, real-time occupancy tracking, personalized resident profiles. While the two sections may seem unrelated, they demonstrate the versatility and potential of Salesforce in managing diverse projects. Effective user management and custom application development can synergize to create innovative solutions, driving business growth and improving user experiences. By exploring these complementary topics, readers gain a deeper understanding of Salesforce's capabilities and the potential for custom applications to transform various industries. Whether managing users or streamlining co-living operations, Salesforce proves to be a powerful tool for achieving efficiency, scalability, and success.

THANK YOU