A CRM APPLICATION TOMANAGE THE BOOKINGOF CO-LIVING

Name: sripuram akhila

EMAIL: akhilasripuram6@gmail.com

PROJECT ABSTRACT:

The Co-living space project aims to create a vibrant and inclusive community where individuals can live, work,and connect with like-minded people.We believe that livingtogether in a shared environment fosters collaboration, reduces isolation, and enhancesthe over all 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 choosethe different AC rooms with Multiple Sharing.Special foods itemswillbe selected by the user in Daily and make Payments in different modes. And Also givethe feedback of the servicelike Room cleaning,internet connection and foods etc…

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TASK 1-Salesforce

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don’t know where you should start on your learning journey?If you’ve answeredyes to any of thesequestions, then you’re in the right place.This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As

you work towardyour badge for this module,we'll take you through thesefeatures and answerthequestion, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customersuccess platform, designedto help you sell, service,market,analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standardproducts and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, beforeSalesforce, your contacts,emails, follow-uptasks, and prospective deals might have been organized something like this: https://youtu.be/r9EX3lGde5k

Activity1- Creating DeveloperAccount

Creating a developerorg insalesforce.

1. Go to https://developer.salesforce.com/signup
2. On the sign up form, enterthe following details:

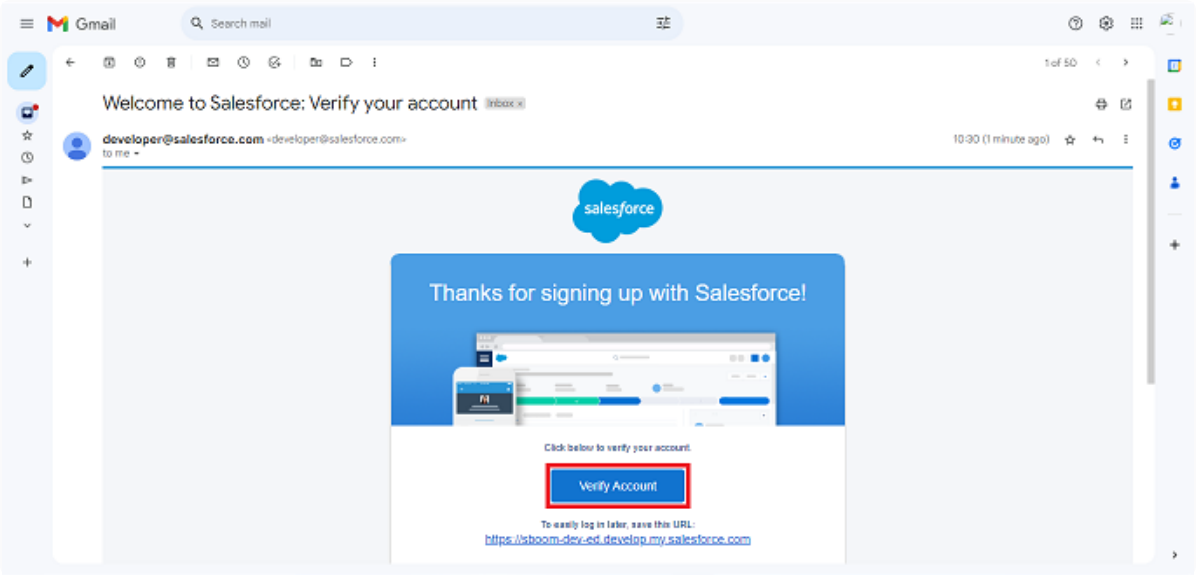
First name & Last name

1. Email
2. Role : Developer
3. Company : College Name
4. County : India

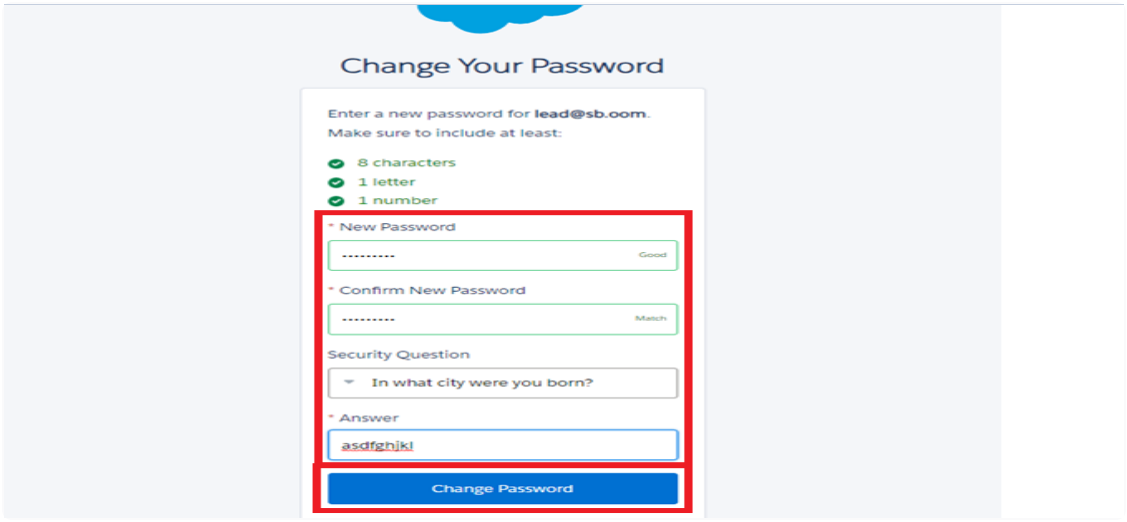
5. Postal Code : pin code

Activity2- Account Activation

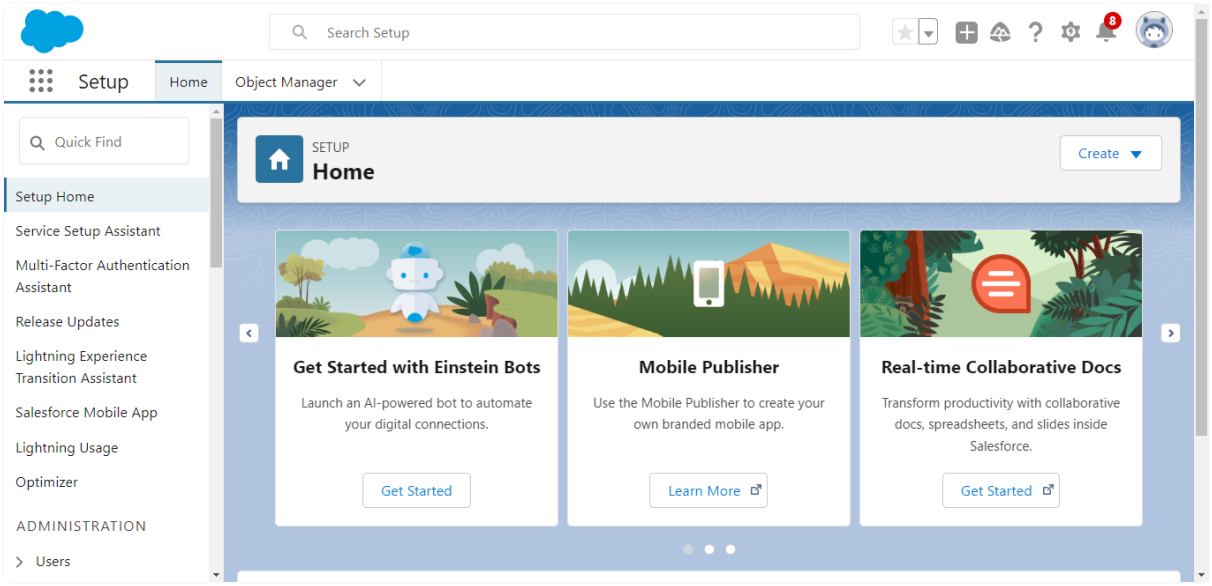
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



4. when you will redirect to your salesforce setup page.



TASK 1-Object

What Is an Object?

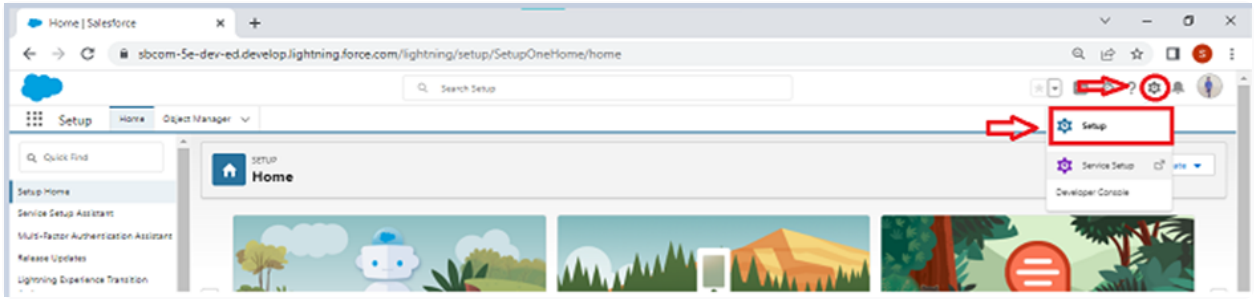
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

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

supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

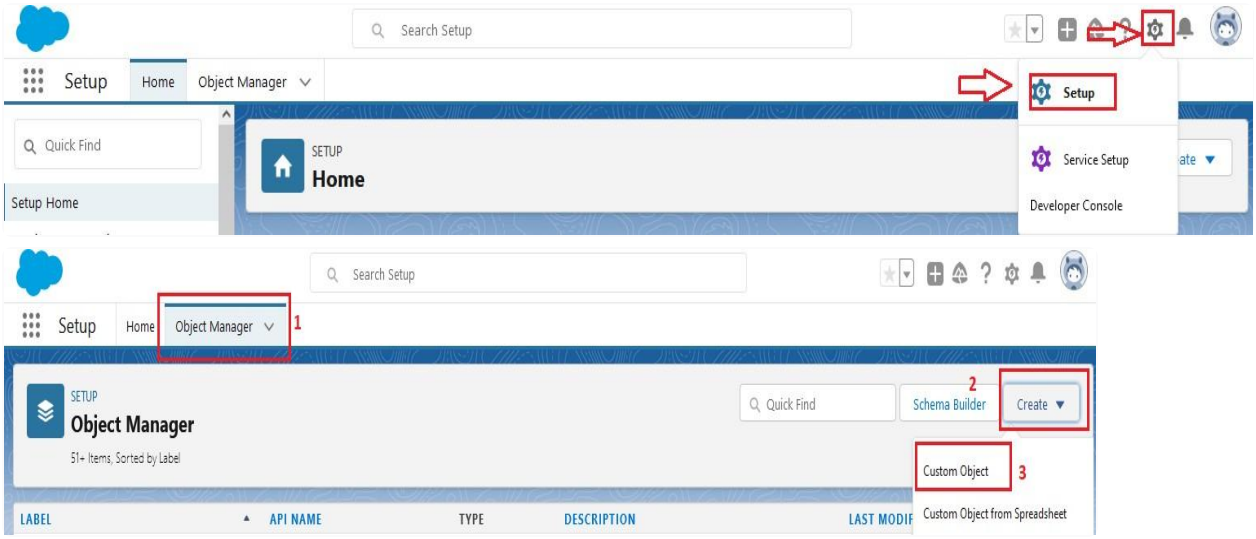
To Navigate to Setup page:
Click on gear icon ? click setup.



Objects and fields involved in Co-Living:

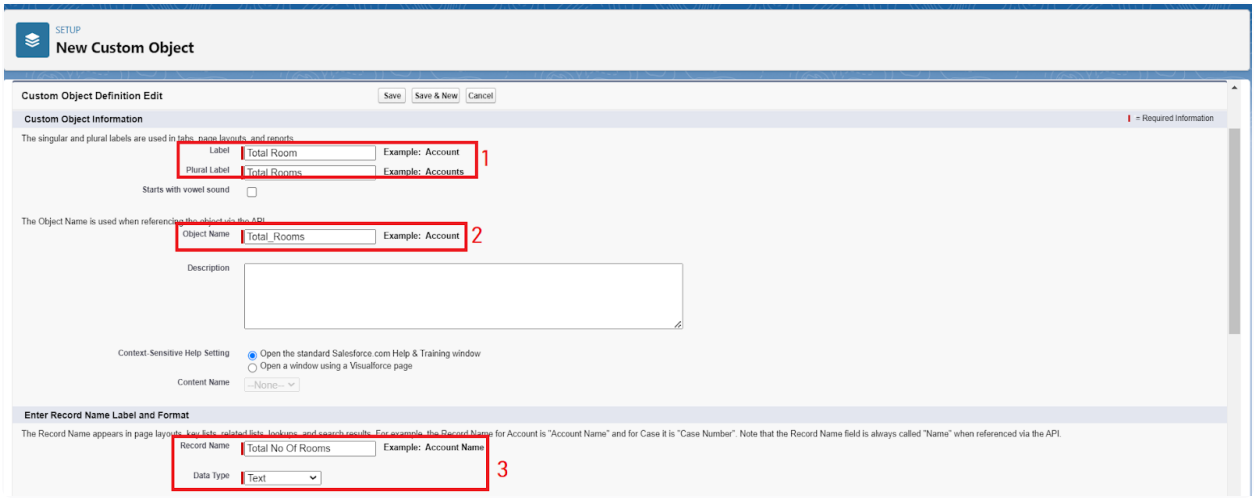
TASK1 - Create a custom object for Total Rooms

Create a custom object for Total Rooms:
To create a custom object, follow these steps:
1. From setup click on object manager.
2. Click create, select custom object.



3. Fill in the label as " Total Room ".
4. Fill in the plural label as " Total Rooms ".
5. Record name: "Total No Of Rooms"

6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.



ACTIVITY2 -Create a custom object for Customer

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Customer1 ".
4. Fill in the plural label as " Customers ".
5. Record name: "Customer Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related
11. list to default page layout.
12. Leave everything else as is, and click Save.

ACTIVITY3 - Create a custom object for Room Booking

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Room Booking ".
4. Fill in the plural label as " Room Bookings ".
5. Record name: "Room No "
6. Select the data type as "Auto number ".
7. Under Display format enter RN-{000}
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

ACTIVITY4 - Create a custom object for Payment

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Payment1".
4. Fill in the plural label as " Payments ".
5. Record name: "Payment No "
6. Select the data type as "Auto number ".
7. Under Display format enter PNO-{000}
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.

11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

ACTIVITY4 - Create a custom object for Food Selection

To create a custom object, follow these steps:
From setup click on object manager.
Click create, select custom object.
Fill in the label as " Food Selection ".
Fill in the plural label as " Food Selections ".
Record name: " Food Selection No "
Select the data type as "Auto number ".
Under Display format enter FS No-{000}
Enter starting Number as 1
In the Optional Features section, select Allow Reports and Track Field History.
In the Deployment Status section, ensure Deployed is selected.
In the Search Status section, select Allow Search.
In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
Leave everything else as is, and click Save.

ACTIVITY 5 - Create a custom object for Feedback

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Feedback ".
4. Fill in the plural label as " Feedbacks ".
5. Record name: "Feedback No "
6. Select the data type as "Auto number ".
7. Under Display format enter Fd No-{0000}

8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

TASK3 - Tab

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

Types of Tabs:

1. **Custom Tabs**

   Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. **Web Tabs**

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

3. **Visualforce Tabs**

   Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. **Lightning Component Tabs**

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

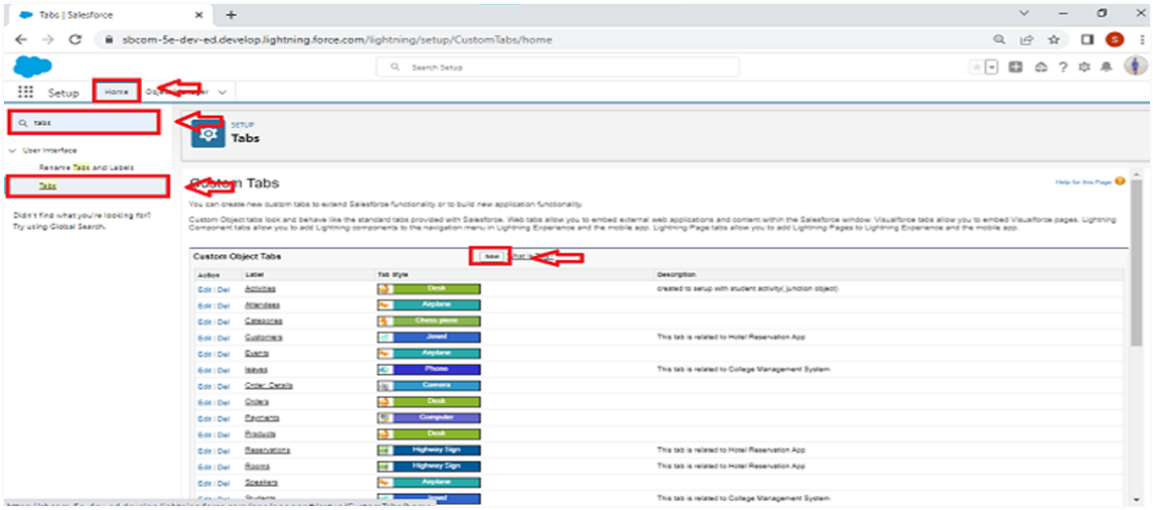
5. **Lightning Page Tabs**

   Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

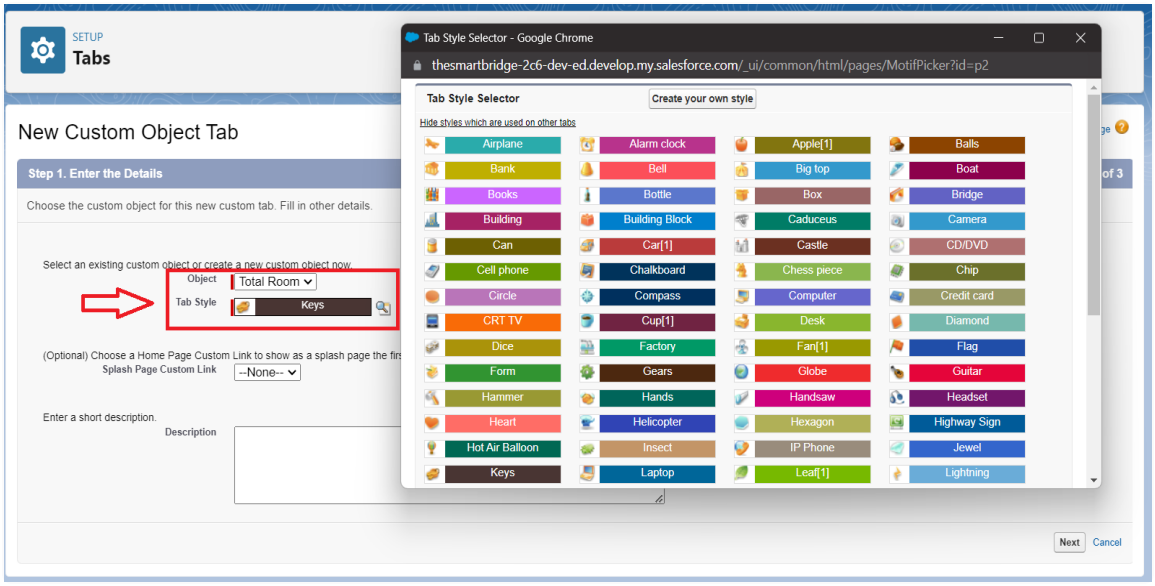
ACTIVITY 1-Creating a Tab for Total Rooms

To create a Tab:(Total Rooms)

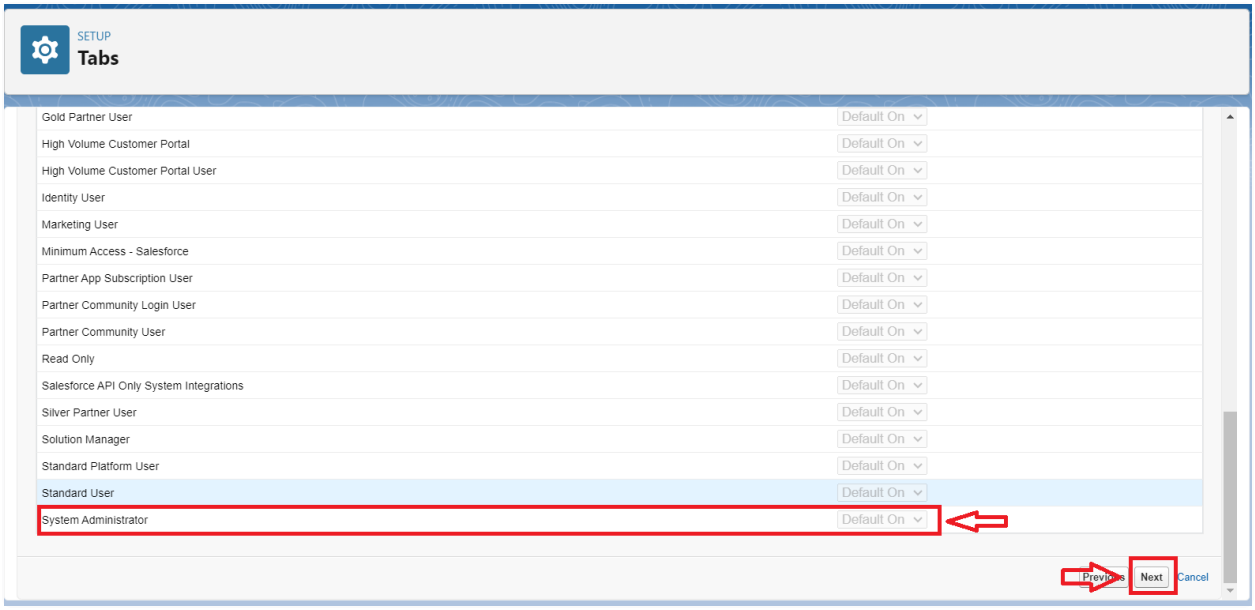
1. Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)



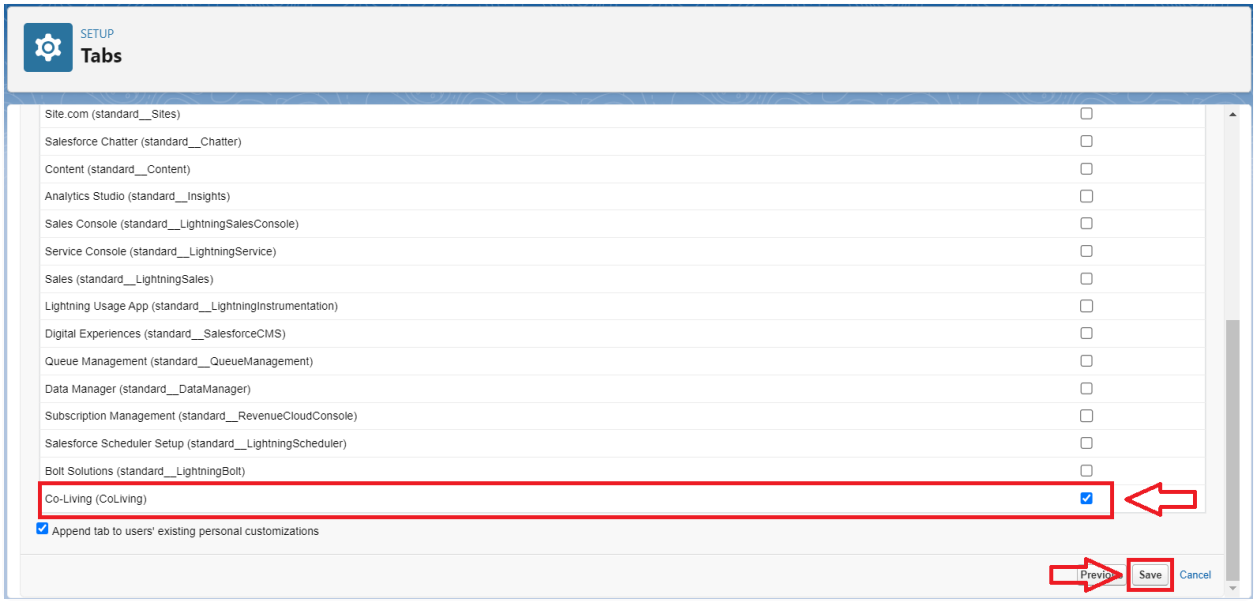
2. Select Object(Total Rooms) > Select the tab style.



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



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



ACTIVITY 2 - Create a Tab for Customers

To create a Tab:(Customers)

1. Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)
2. Select Object(Customers) > Select the tab style > Next (Add to profiles page) keep

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

ACTIVITY 3 -To create a Tab for Room Bookings

To create a Tab:(Room Bookings)

1. Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)
2. Select Object(Room Bookings) ? Select the tab style ? Next (Add to profiles page) keep it as default ? Next (Add to Custom App) keep it as default ? Save.

ACTIVITY 4 - Create a Tabs For Remaining Objects

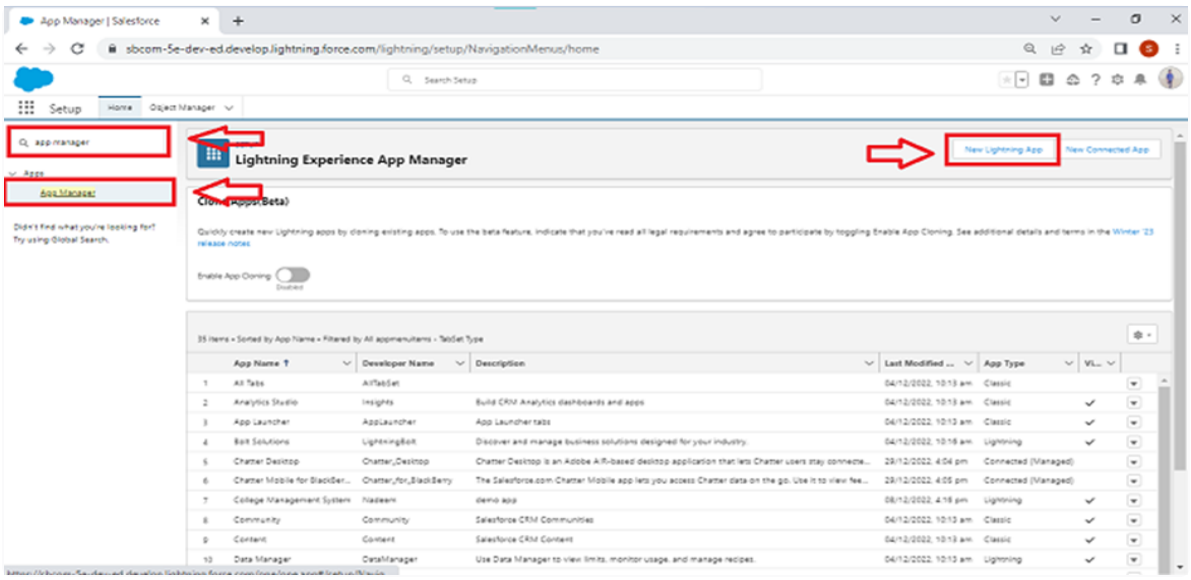
Now create the tabs for Payments, Food Selections, Feedbacks Objects.

TASK 4 - The Lightning App

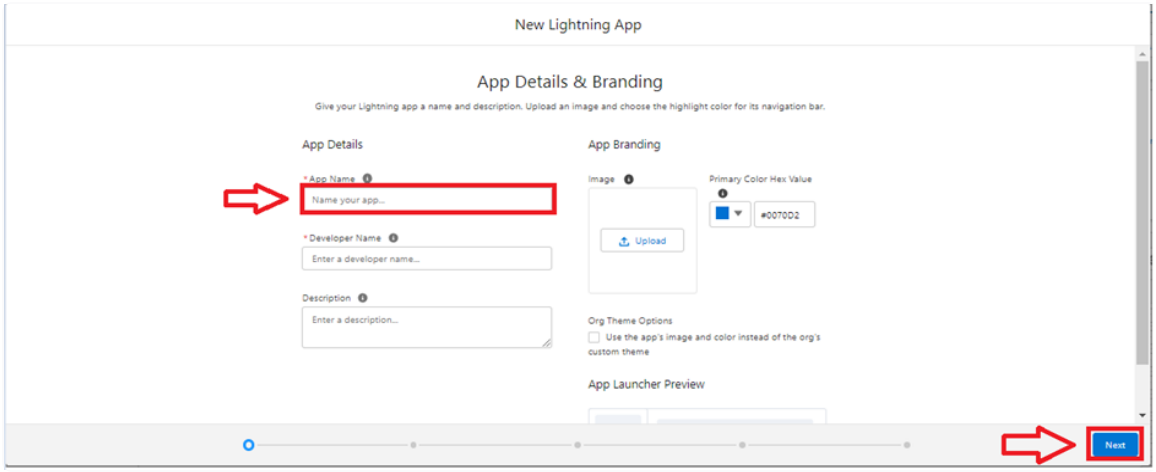
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

TASK 1- Create a Lightning App

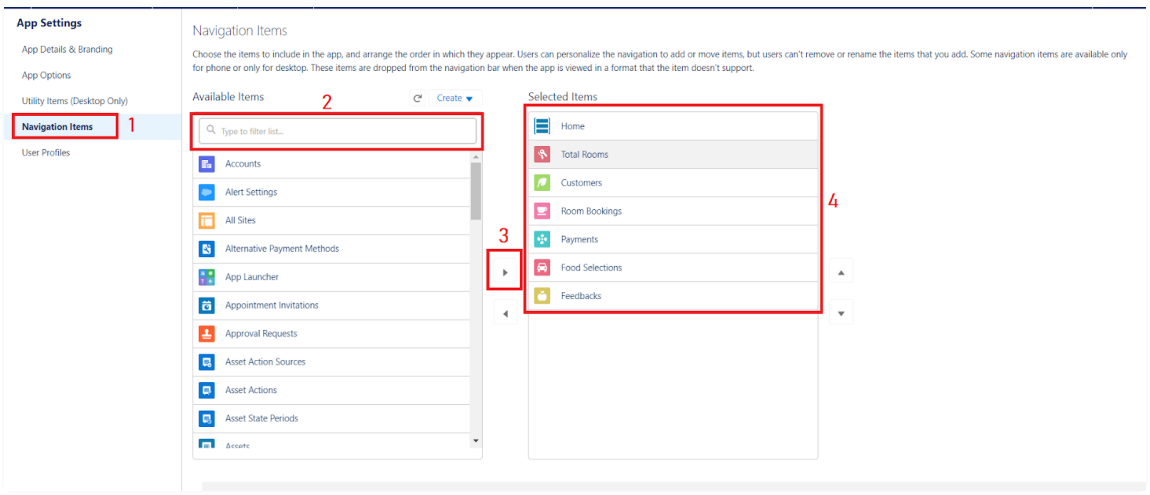
To create a lightning app page:
1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.



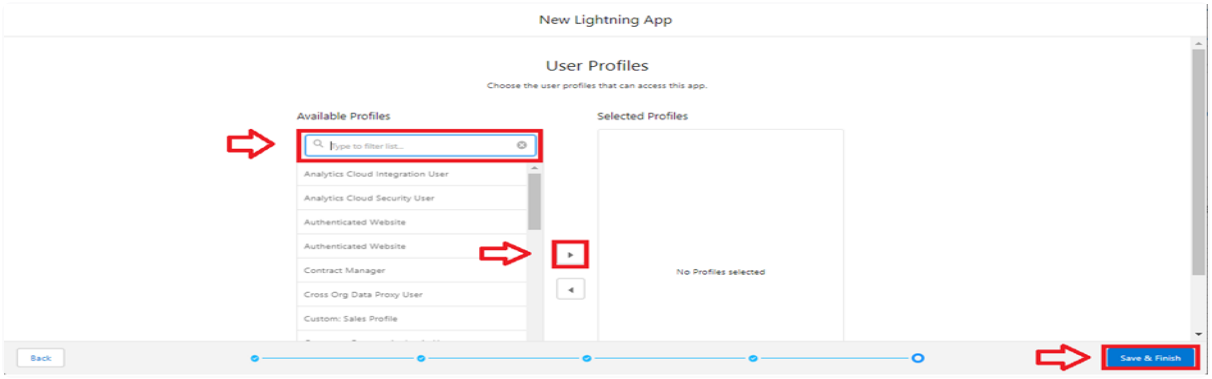
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.



3. To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers1, Room Booking, Payments1, Food selection, Feedbacks, Reports and Dashboards) from the search bar and move it using the arrow button > Next.



4. To Add User Profiles:



5. Search profiles (System administrator) in the search bar > click on the arrow button > save & finish.

THANK YOU