

A
documentation
on

A CRM application to manage the booking of Co-Living

Developed By

Ebbili Prasuna
214g1a0274@srit.ac.in

Abstract

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

INDEX PAGE FOR TOPICS

1.Creation of Developer Account	01-02
2.Object	03-09
3.Tabs	10-11
4.The Lightning App	12-13
5.Fields & Relationships	14-19
6.validation Rule	20-21
7.Profile	21-22
8.Roles	22-23
9.Users	24-26
10.User Adoption	26-27
11. Reports	28-29
12.Dashboards	30-32
13.Flows	33-34

1.Creating a Developer Account in Salesforce

Creating a developer org in salesforce.

Step1: Go to <https://developer.salesforce.com/signup>

Step2: on the sign up form, enter the following details

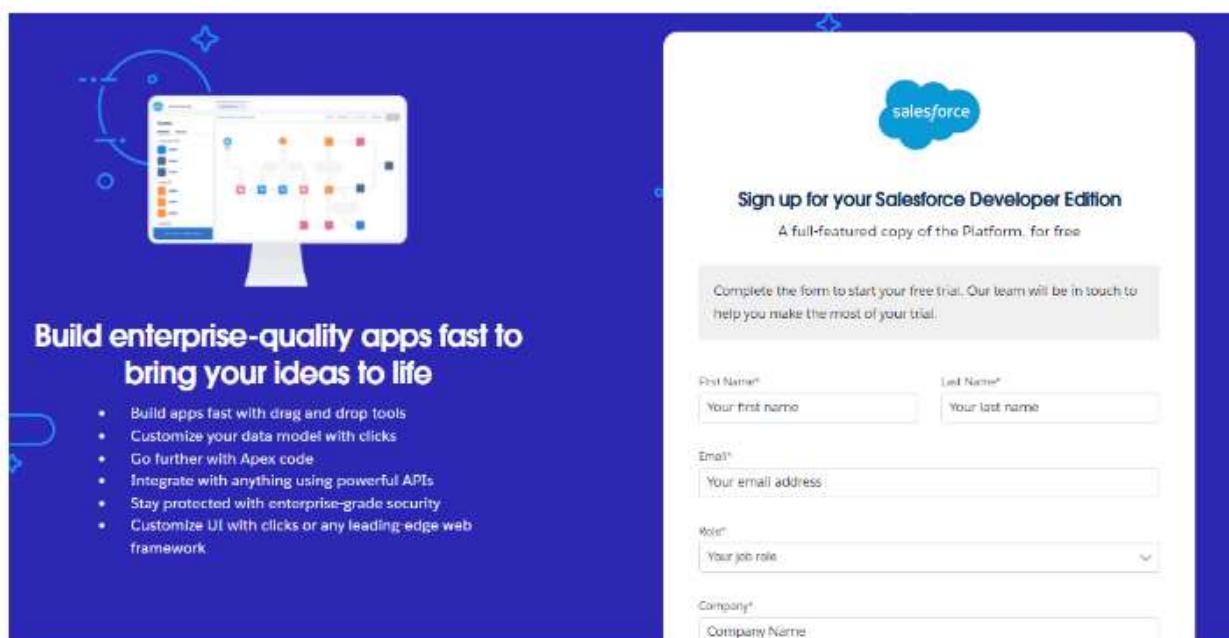
- First name & Last name
- Email
- Role : Developer
- Company : College Name
- County : India
- Postal Code : pin code

Username: should be a combination of your name and company

This need not be an actual email id, you can give anything in the format:

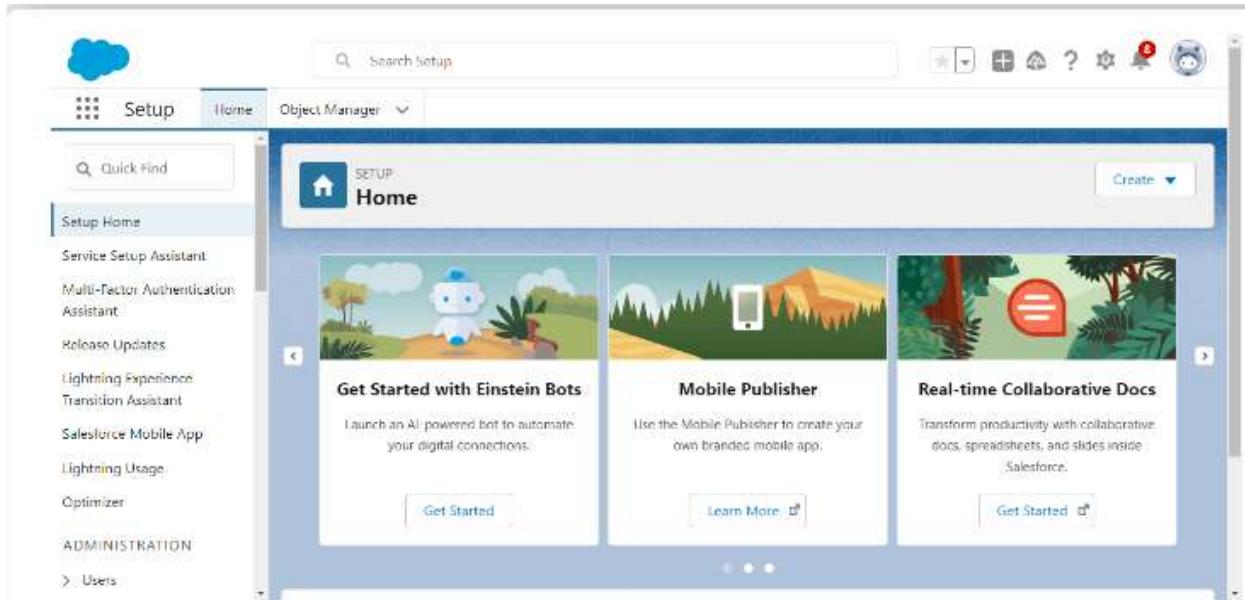
username@organisation.com

click on sign me up filling these



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 5-10 mins



2.Click on verify account

3.give a password and answer and answer a security question and click on change password

2.OBJECT

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.
11. Leave everything else as is, and click Save.



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.

- 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.

New Custom Object

Custom Object Definition Edit

Custom Object Information

The display and case labels are used to identify records and users.

Label	Name	Example: Account
Display name	Lead Name	Example: Accounts

Lead Lightning record

The Object Name is used when labeling leads.

Name	Lead Name	Example: Account
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Labels

Created Activities By Setting

- Open the standard Salesforce Lightning & Trailhead interface
- Open a custom settings Record page

Created Name

Enter Record Name Label and Format

The Record Name appears on pages by default. To change the label or format, click the pencil icon. For example, for Accounts, "Record Name" and for Case, "Case Number". Note that the Record Name field is also called "Name" when referenced via the API.

Record Name	Date No. (1000)	Example: Account Name
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Auto Type

Optional Features

Lead Pages **Red Arrow**

Lead Profiles

Lead Field History

Allow in Chatter Groups

Enable Learning

Lead Conversion

When these settings are enabled, the object is classified as an Enterprise Application object. When these settings are disabled, the object is classified as a light Application object. Learn more.

Allow Sharing

Allow Bulk API Access

Allow Streaming API Access

Deployment Status

In Development

Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search **Red Arrow**

Object Creation Options (Available only when certain object is first created)

Add Notes and Attachments Related List in Default Page Layout

Launch New Custom Tab Wizard after saving this custom object

Buttons

Save **Save & New** **Cancel**

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.

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.

Create a custom object for Food Selection

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 "Food Selection".
 4. Fill in the plural label as "Food Selections".
 5. Record name: "Food Selection No"
 6. Select the data type as "Auto number".
 7. Under Display format enter FS No-{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.

Create a custom object for Feedback

To create a custom object, follow these steps:

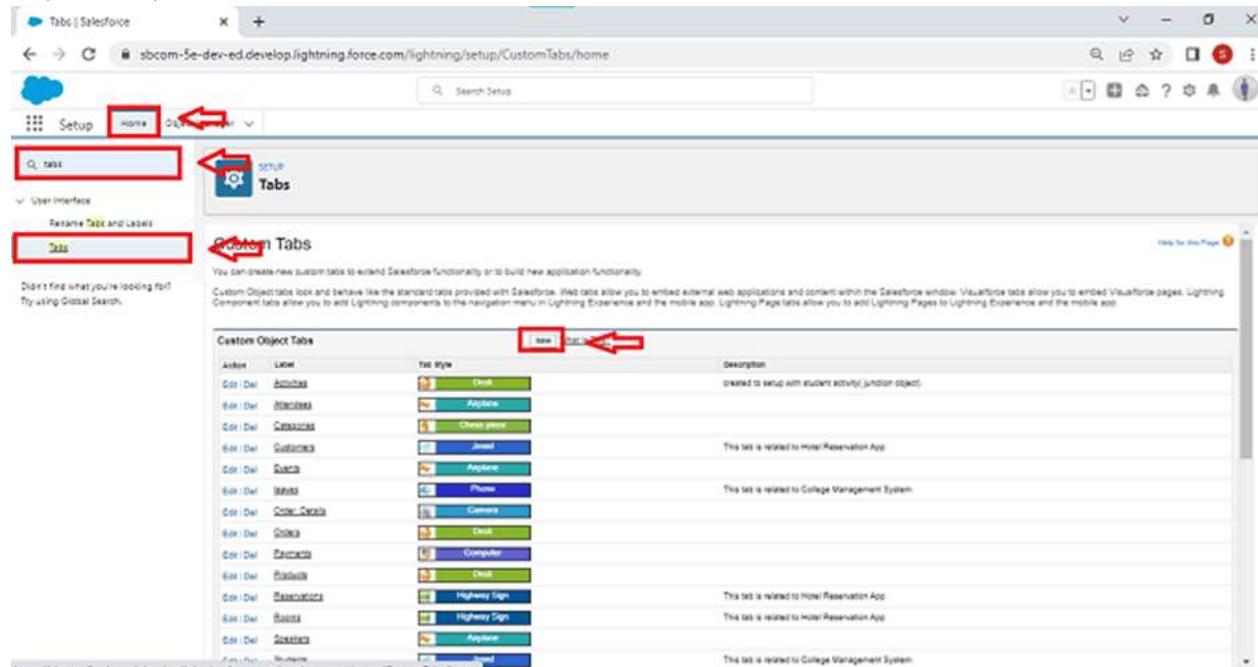
1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as "Feedback".
4. Fill in the plural label as "Feedbacks".
5. Record name: "Feedback No"
6. Select the data type as "Auto number".
7. Under Display format enter Fd No-{0000}
8. Enter starting Number as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

3.TABS

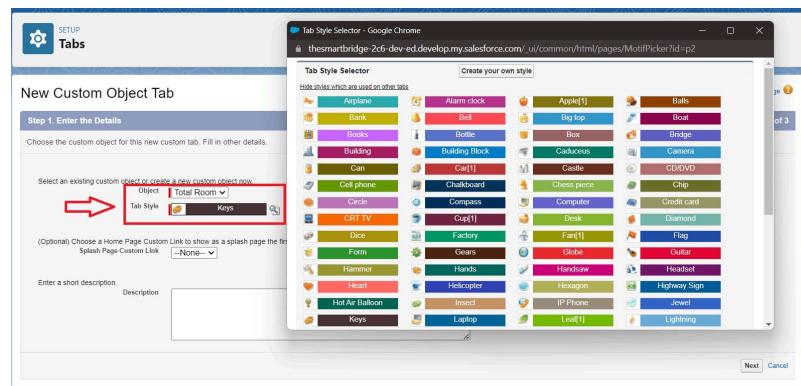
Creating a Tab for Total Rooms

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

SETUP Tabs

User Profile	Action
Gold Partner User	Default On
High Volume Customer Portal	Default On
High Volume Customer Portal User	Default On
Identity User	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Salesforce API Only System Integrations	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

Previous Next Cancel

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

SETUP Tabs

Tab Name	Action
Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Co-Living (CoLiving)	<input checked="" type="checkbox"/>

Append tab to users' existing personal customizations

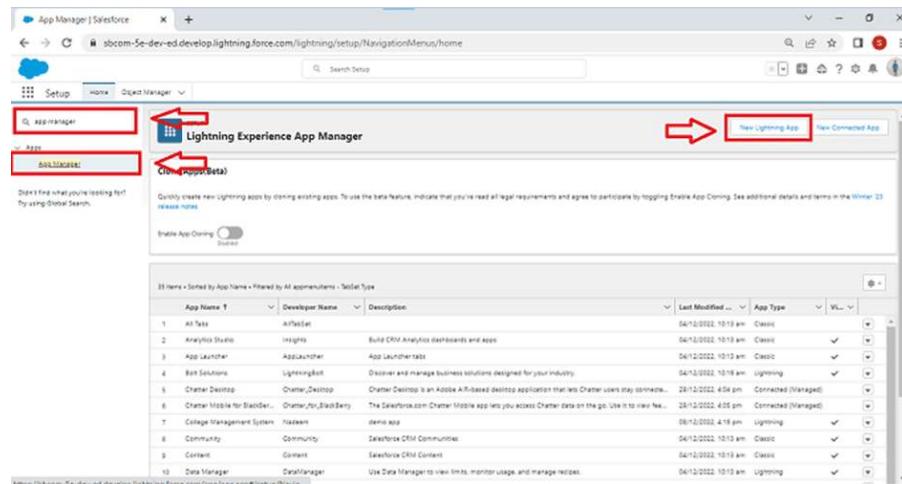
Previous Save Cancel

4.LIGHTNING APP

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: .



App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items 1

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items 2

Type to filter list...

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods
- Assets

Selected Items 4

- Home
- Total Rooms
- Customers
- Room Bookings
- Payments
- Food Selections
- Feedbacks

3

>

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ①
Name your app... 2

Developer Name ②
Enter a developer name... 3

Description ③
Enter a description... 4

App Branding

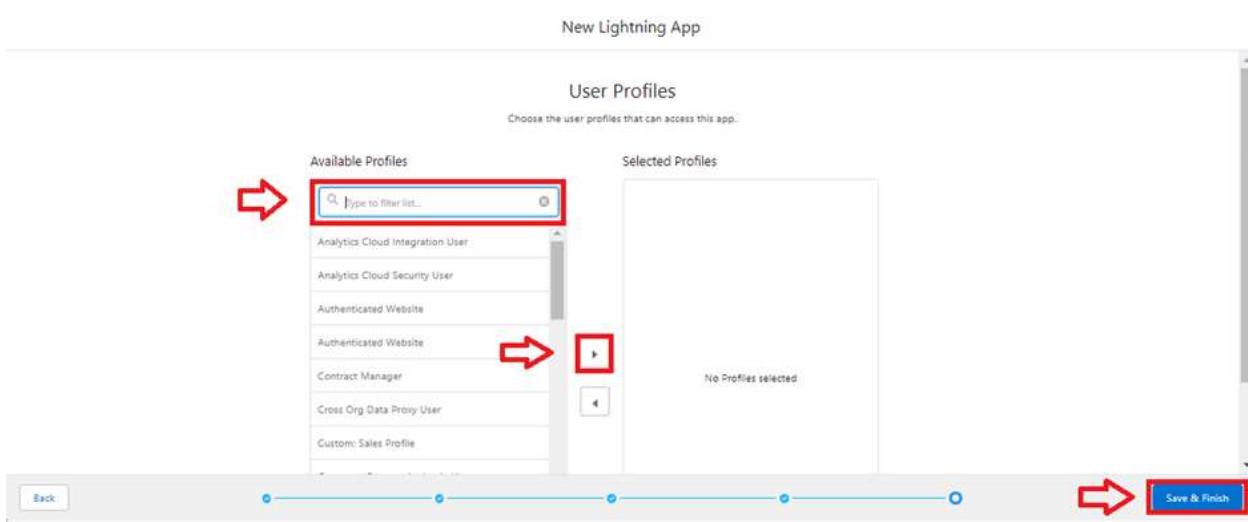
Image ④
 5

Primary Color Hex Value ⑤
#0070D2 6

Org Theme Options
 Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next 7



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

5.FIELDS AND RELATIONSHIPS

1. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object
- .2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Phone”
4. Click on next
5. Fill the Above as following:

1. Field Label: Phone no
2. Field Name : gets auto generated
3. Click on Next > Next > Save and new.

2. To create another fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
 - Field Label: Email
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

3. To create another fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data type as a “Text Area” and Click on Next
4. Fill the Above as following:
 - Field Label: Permanent Address
 - Field Name : It's gets auto generated
 - Click on Next > Next > Save and new.

4. To create another fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Picklist” and Click on Next
4. Fill the Above as following:
 - Field Label: Current Status
 - Value - Select enter values with each value separated by a new line
 - 1. Student
 - 2. Employee
 - 3. Others
 - Select required
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

Creation of fields for the Room Booking object

1. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data Type as a "Picklist"
4. Fill the Above as following:
5. Field Label: Room Sharing
 - Value - Select enter values with each value separated by a new line
Single sharing
 - Double sharing
 - Triple sharing
6. Select required
7. Click on Next > Next > Save and new.

2. To Create a Fields & Relationship to an Room Booking Object

To create fields & relationship to an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data Type as a "Master-detail Relationship"
4. Click on Next
5. Click on the Related to drop down and Select the "Customer1" object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Name
 - Field Name : It's gets auto generated

3. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > New

3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
 - Field Label: AC-3000
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new

4. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
 - Field Label: Advance Payment for 1 Month
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new

5. To create fields in an object:

1. Go to setup ? click on Object Manager ? type object name(Room Booking) in the search bar ? click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Currency”
4. Click on Next
5. Fill the Above as following:
 - Field Label: Amount
 - Length: (18,0)
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new

6. To Create a Fields & Relationship to an Object

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Rooms” object and click on Next
 - Fill the Above as following:
 - Change the Field Label: Total No Of Rooms
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

7. To Create a Rollup Summary Field in “Total Room Object”

1. After Creating the Master- Detail Relationship Than Only you can create the Rollup Summary
2. Go to setup > click on Object Manager > type object name(Total Rooms) in the search bar > click on the object.
3. Now click on “Fields & Relationships” ? New
4. Select Data type as a “Roll-up Summary” and Click on Next
 - Fill the Above as following:
 - Field Label: Rooms Booked
 - Field Name :It's gets auto generated
 - Click on Next
5. Select the Room Bookings in the Summarized Object
6. Select the count Radio button in the select Roll-up Type

8. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Rooms Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:

- Field Label: Rooms Available
- Field Name : It's gets auto generated
- Select the Formula Return Type as "Number"
- Select the Decimal places as "0" and Click on Next
- Click on the Advanced Formula and Enter the value in formula box " 30 - " and Click on insert field than you will find a pop window under the Room Booking select the Total No Of Rooms in the second Column and select the Room Booked in the third column and click on insert " 30 - Total_No_Of_Rooms__r.Rooms_Booked__c " and Check Syntax

To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data Type as a "Checkbox"
4. Click on Next
5. Fill the Above as following:
 - Field Label: Check in
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new

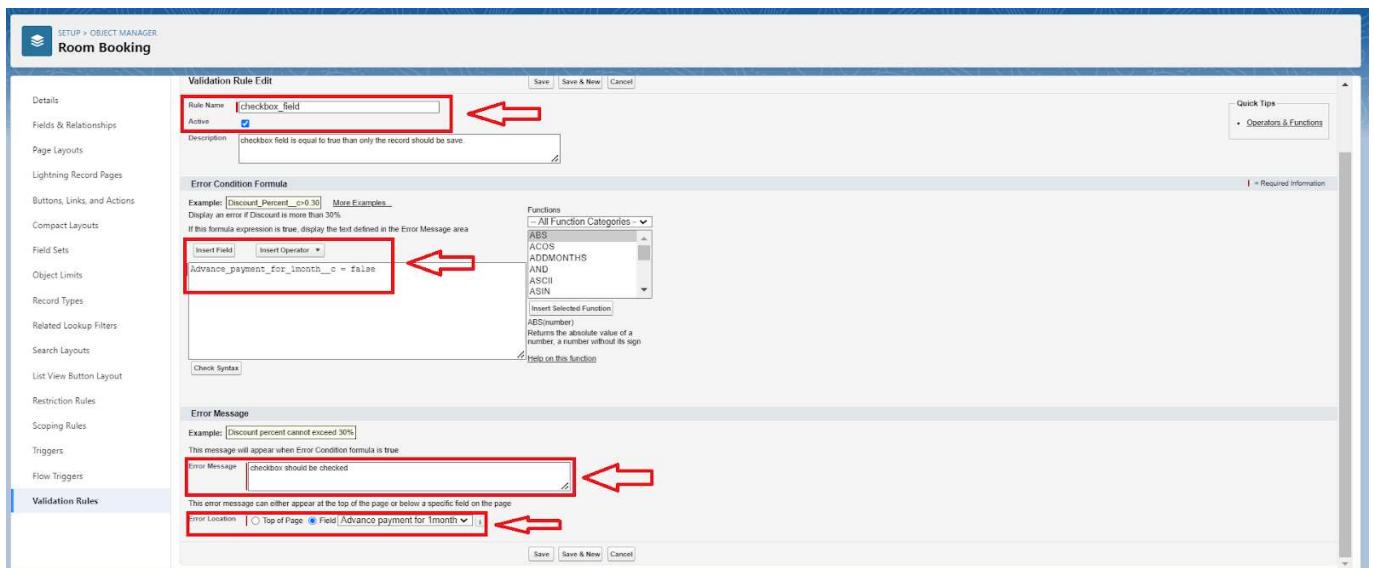
10. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" ? New
3. Select Data Type as a "Checkbox"
4. Click on Next
5. Fill the Above as following:
 - Field Label: Check Out
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new

6.VALIDATION RULE

create a validation rule to an Room Booking Object

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Validation rule” at top > New.
3. Enter Rule name “checkbox field” and make the validation should be Active.
4. Enter the formula in the formula Box “Advance_payment_for_1month__c = false” and check for syntax error.
5. Enter the error message “Checkbox should be checked”
6. Select error location as field(Advance payment for 1month)
7. Click on save.



7.PROFILE

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

To create a new profile:

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard platform User)
2. Enter profile name (Custom platform User1) > Save.
3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give only Read access

permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

5. Scroll down and Click on Save.
- 6.

The screenshot shows a software interface with two main sections. On the left, there is a table titled 'Basic Access' under 'Data Administration'. It has columns for 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All'. Below this table are three rows: 'Customers' (all permissions checked), 'Feedbacks' (all permissions checked), and 'Food Selections' (all permissions checked). On the right, another table titled 'Basic Access' under 'Data Administration' is shown. It has the same six columns. Below it are three rows: 'Payments' (all permissions checked), 'Room Bookings' (all permissions checked), and 'Total Rooms' (all permissions checked). Red arrows point from the 'Food Selections' row on the left to the 'Payments' row on the right, indicating a transfer or comparison of permissions. Below these tables are 'Session Settings' and 'Password Policies' sections.

	Read	Create	Edit	Delete	View All	Modify All
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Feedbacks	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Food Selections	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

	Read	Create	Edit	Delete	View All	Modify All
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Room Bookings	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Total Rooms	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in:	Never expires
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obscure secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>

8.ROLES

Marketing Role

1. Go to quick find > Search for Roles > click on set up roles.
2. Click on Expand All and click on add role under CEO role.
3. Give Label as "Marketing" and Role name gets auto populated.
4. Then click on Save.

The screenshot shows the Salesforce Setup Roles page. On the left, a sidebar lists categories like Users, Sales, Service, and Case Teams, with 'Roles' selected. The main content area displays a 'Sample Role Hierarchy' diagram:

```

graph TD
    CEO[CEO President] --> CFO[CFO VP, Sales]
    CFO --> WSD[Western Sales Director]
    CFO --> ESD[Eastern Sales Director]
    CFO --> ISD[International Sales Director]
    WSD --> WSRR[Western Sales Rep]
    WSD --> CARS[CA Sales Rep]
    WSD --> ORSR[OR Sales Rep]
    ESD --> ESSR[Eastern Sales Rep]
    ESD --> NYSR[NY Sales Rep]
    ESD --> MASR[MA Sales Rep]
    ISD --> ISSR[International Sales Rep]
    ISD --> ASR[Asian Sales Rep]
    ISD --> EESR[European Sales Rep]
  
```

Annotations include a red arrow pointing to the 'Roles' link in the sidebar, another red arrow pointing to the 'Set Up Roles' button at the bottom right of the page, and a red box highlighting the 'Set Up Roles' button.

The screenshot shows the Salesforce Role Edit page for a 'New Role'. The 'Role Edit' section contains fields for 'Label' (Marketing), 'Role Name' (Marketing), and 'This role reports to' (CEO). A red box highlights the 'Label' field, and a red arrow points to the 'Save' button at the bottom right.

Receptionist Role

1. Go to quick find > Search for Roles > click on set up roles.
2. Click on Expand All and click on add role under CEO role.
3. Give Label as "Receptionist" and Role name gets auto populated
4. Then click on Save.

9.USERS

Create User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : sandeep
 - Last Name : gujja
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.com
 - Nick Name : Give a Nickname
 - Role : CEO
 - User licence : Salesforce
 - Profiles : Custom user
- 3.save.

The screenshot shows the 'New User' creation page in Salesforce. The 'General Information' section on the left contains fields for First Name, Last Name, Alias, Email, Username, and Nickname. The 'User Edit' section on the right contains fields for Role, User License, Profile, and Active status. Both sections have a red border around them, and a red arrow points from the left side of the image to the 'General Information' section, while another red arrow points from the right side to the 'User Edit' section.

Create Another User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : Abhilash
 - Last Name : Garapati
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.com
 - Nick Name : Give a Nickname
 - Role : Marketing
 - User licence: Salesforce platform
 - Profiles : Custom Platform User1

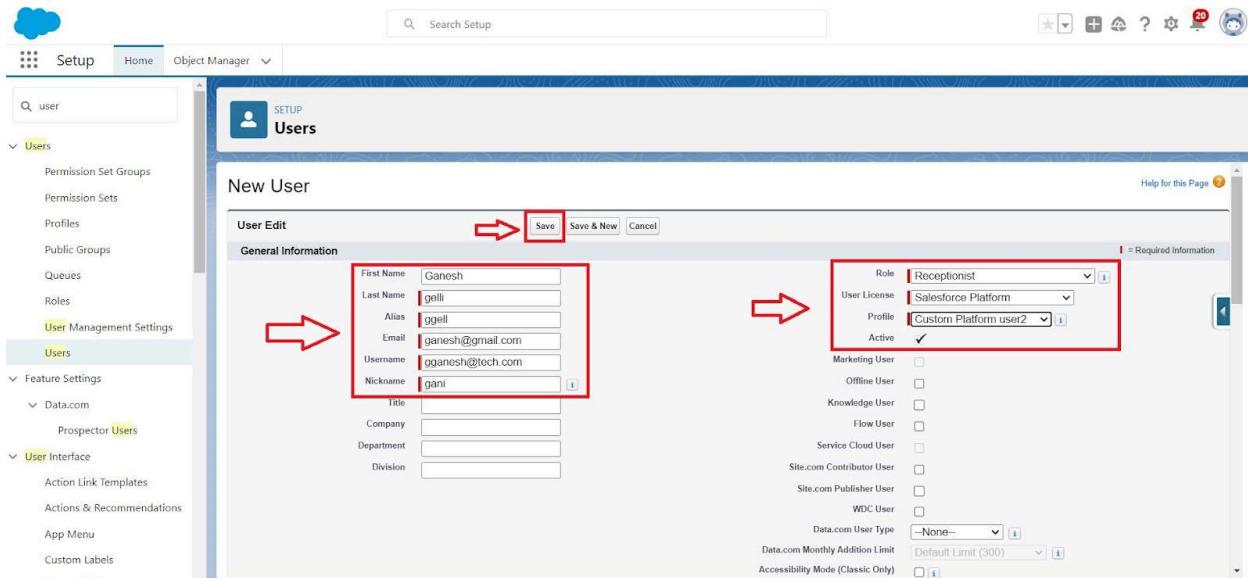
The screenshot shows the 'User Edit' page for a user named 'abilash garapati'. The page is divided into two main sections: 'General Information' and 'Advanced Settings'.

General Information: This section contains fields for First Name, Last Name, Alias, Email, Username, and Nickname. The 'First Name' field is highlighted with a red box and has a red arrow pointing to it from the left. The 'Save' button at the top right of this section is also highlighted with a red box and has a red arrow pointing to it from above.

Advanced Settings: This section includes fields for Role, User License, Profile, and Active status. The 'Role' field is set to 'Marketing' and is highlighted with a red box and has a red arrow pointing to it from the right. The 'User License' field is set to 'Salesforce Platform' and is highlighted with a red box and has a red arrow pointing to it from the right. The 'Profile' field is set to 'Customer Platform user1' and is highlighted with a red box and has a red arrow pointing to it from the right. The 'Active' checkbox is checked and is highlighted with a red box and has a red arrow pointing to it from the right.

Create Another User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : Ganesh
 - Last Name : gelli
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.com
 - Nick Name: Give a Nickname
 - Role : Receptionist
 - User licence: Salesforce Platform
 - Profiles : Custom Platform user2



10.USER ADOPTION

Create a Record (Customers)

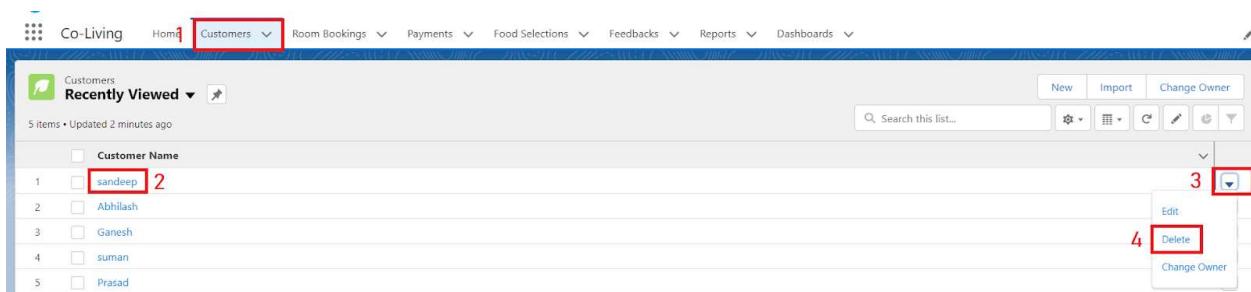
1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it
3. Click on the Customers Tab.
4. Click new and fill details & Save

View a Record (Customers)

1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on Customer Tab.
4. Click on any record name. you can see the details of the Customer.

Delete a Record (Customers)

1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on the Customers Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



11.REPORTS

Create Report

1. Go to the app > click on the reports tab
2. Click New Report

The screenshot shows the 'Reports' section of a software application. At the top, there's a navigation bar with tabs like Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is currently selected), and Dashboards. Below the navigation bar is a search bar labeled 'Search recent reports...' and a 'New Report' button, both of which are highlighted with red boxes. The main area displays a table of reports under the 'Recent' category. The columns include Report Name, Description, Folder, Created By, Created On, and Subscribed. There are three reports listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
Room booking report	custom report	Veera Venkata Varaprasad Androthu	14/6/2023, 2:58 pm		
Room booking report	Private Reports	Veera Venkata Varaprasad Androthu	7/6/2023, 4:53 pm		
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	5/6/2023, 10:09 am	

3. Select report type from category or from report type panel or from search panel
“Customers with Room Bookings with Total Rooms ” > click on start report.

The screenshot shows the 'Create Report' dialog. On the left, there's a sidebar with categories: Recently Used, All (highlighted with a red box and labeled 1), Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets. In the main area, there's a search bar labeled 'Select a Report Type' with the text 'customers' (highlighted with a red box and labeled 2). Below the search bar is a table of report types:

Report Type Name	Category
Activities with Customers	Standard
Customers	Standard
Customers with Room Bookings and Total Rooms	Standard
Customers with Payments	Standard
Customers with Payments and Room Booking	Standard
Customers with Food Selections	Standard
Total Rooms with Room Bookings and Customers	Standard
Customers with Room Bookings with Total Rooms	Custom
Customers with Room Bookings with Payments	Custom

The row 'Customers with Room Bookings and Total Rooms' is highlighted with a red box and labeled 3. A red box also highlights the dropdown arrow next to the 'Category' column for this row, labeled 4.

4. Customize your report
5. Add fields from left pane as shown below
6. Save or run it.

Create another Report

1. Go to the app > click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel

Select customer with Room booking with Payments ? click on start report.

4. Customize your report
 5. Add fields from left pane as shown Above
 6. Save or run it.

REPORT ▾

Room booking report Customers with Room Bookings with Payments

Save Close Run

Outline Filters Groups Customer Name Room No Phone no Email id Permanent Address current Status Room sharing Advance payment for 1month AC - 3000 Amount

GROUP ROWS Add group... Q Customer Name x

GROUP COLUMNS Add group... Q

Subtotal

Ganesh RN-005 7300788526 abhi@gmail.com Chandravaram Employee single sharing - 14000 1 0 ₹28,000

Subtotal

Prasad RN-001 868875423 ganesh@gmail.com Tadiparvu Student Triple sharing - 10000 1 0 ₹20,000

Subtotal

sandeep RN-007 9494724362 varaprasadandirothu@gmail.com Tadiparvu Employee single sharing - 14000 1 1 ₹34,000

Subtotal

RN-003 970526532 sandeep@gmail.com Hyderabad Employee Triple sharing - 10000 2 0 ₹20,000

Subtotal

RN-004 870587262 suman@gmail.com Ichapuram Employee Double sharing - 12000 1 1 ₹30,000

Total 6 2 ₹156,000

Row Counts Detail Rows Subtotals Grand Total

Conditional Formatting

12.Dashboards

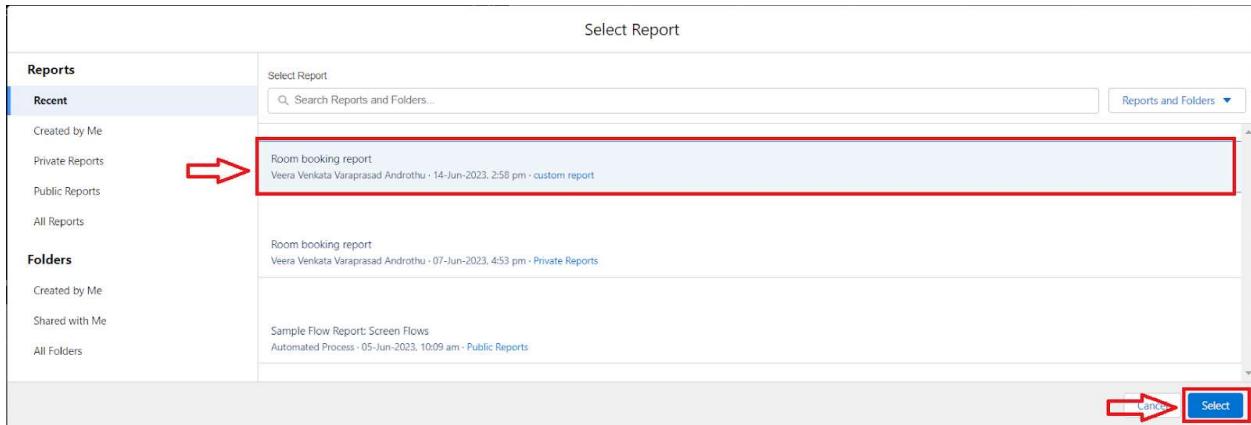
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Create Dashboard

1. Go to the app > click on the Dashboard tabs and click on new Dashboard
2. Give a Name and click on Create.

The screenshot shows the 'Co-Living' application interface. At the top, there is a navigation bar with various tabs: Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Dashboards' tab is highlighted with a red box and the number '1'. Below the navigation bar, there is a search bar labeled 'Search recent dashboards...' with the number '2' next to it, and a 'New Dashboard' button. A modal window titled 'New Dashboard' is open in the center. It has a form with fields: 'Name' (containing 'custom Dashboard'), 'Description' (empty), 'Folder' (containing 'Custom Dashboard'), and a 'Create' button. Red arrows point to the 'Name' field and the 'Create' button, indicating the steps for creating a new dashboard.

3. Select add component.
4. Select a Report Customer with Room Booking and click on select



Edit Component

Room booking report

Subtitle

Amount

Footer

Legend Position

Right

Component Theme

Light (Dashboard default)

Dark

Preview

Room booking report

Amount

Sum of Amount: ₹156k

Customer Name

- Abhilash █
- Ganesh █
- Prasad █
- sandeep █
- suman █

[View Report \(Room booking report\)](#)

Cancel
Update

5.Click Add then click on Save and then click on Done

Create Another Dashboard

1. Go to the app > click on the Dashboard tabs and click on new Dashboard.
2. Give a Name and click on Create.
3. Select add component.
4. Select a Report Customer with Room Booking with Payments and click on select.
5. Click Add then click on Save and then click on Done.

13.FLOWS

Flows

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

Why do we need to create a flow:

To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

Create a Flow

1. Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a Room Booking in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.
6. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Decision Element".
- 7.
7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.
 - Resource: Select Record
 - .Room sharing.
- Operator: Select Equals.

Value: Select Single sharing.

Click on “Add Condition”

Resource: Select Record.AC-3000.

Operator: Select Equals.

Value: Select False.

Click on “+” Symbol In the Outcome Order

7.Enter the Details Label: Field should be Update, API name: Gets Automatically generated

8.Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.

Resource: Select Record.Room sharing.

Operator: Select Equals.

Value: Select Single sharing.

Click on “Add Condition”

Resource: Select Record.AC-3000.

Operator: Select Equals.

Value: Select False.

Click on “+” Symbol In the Outcome Order.

Conclusion

Our Salesforce-based CRM application for Co-Living booking management has successfully demonstrated the power of streamlining operations, enhancing customer experiences, and driving business growth. By leveraging Salesforce's robust features and customization capabilities, we have created a tailored solution that addresses the unique needs of the Co-Living industry.