

A  
documentation  
on

## **A CRM application to manage the booking of Co-Living**

Developed By

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## **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...

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# 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

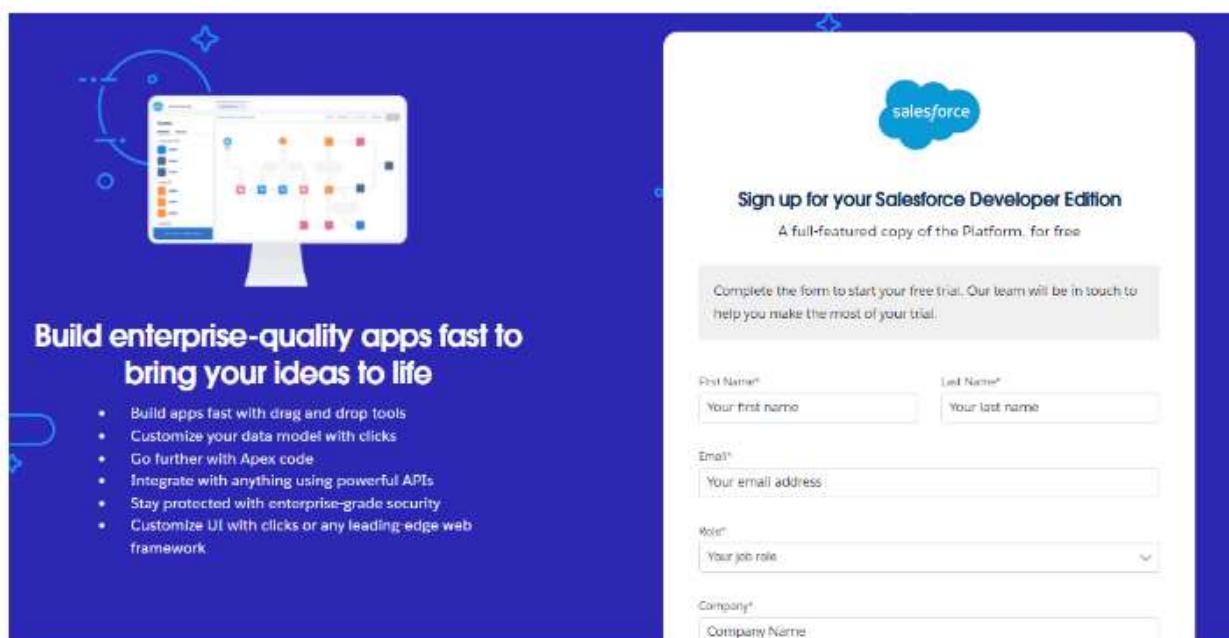
- First name & Last name
- Email
- Role : Developer
- Company : College Name
- County : India
- Postal Code : pin code

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:

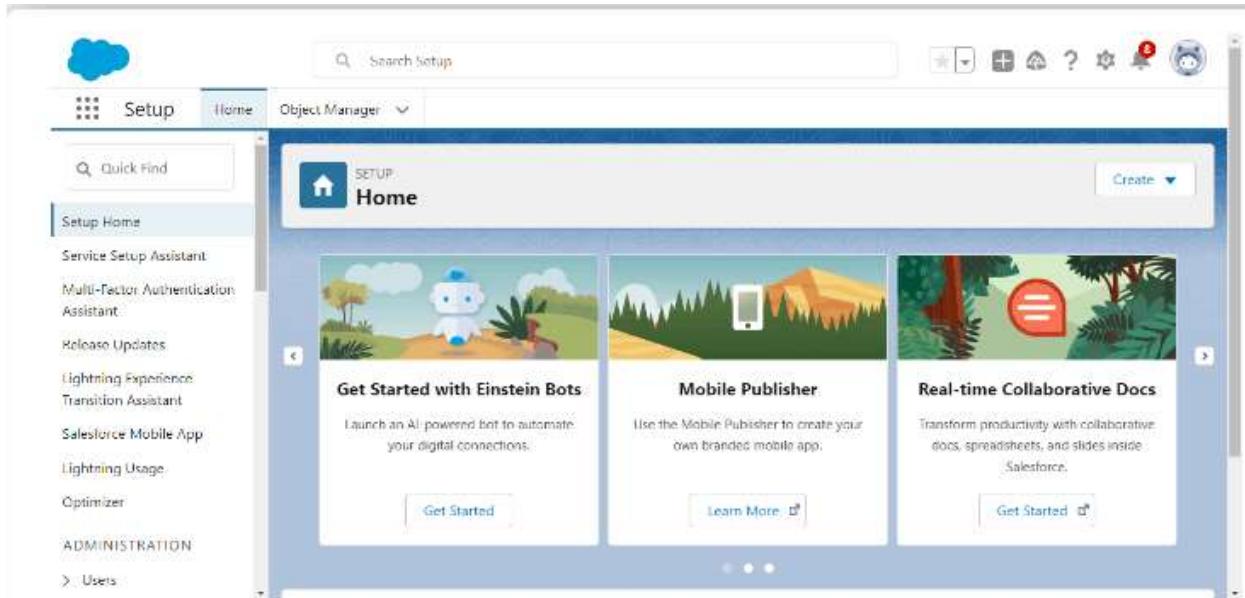
username@organisation.com

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	Case Name	Example: Accounts

Lead Lightning record access

The Object Name is used when labeling leads and cases.

Name	Name	Example: Account
------	------	------------------

Case Name  Example: Account

Description:

Related Activities

Created Activities By Setting:

- Open the standard Salesforce reporting & Tracking interface
- Open a custom settings Record page

Created Date:

**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-01, 'Case Number'. Note that the Record Name field is also called 'Name' when referenced via the API.

Record Name	Date No. (1) Records	Example: Account Name
-------------	----------------------	-----------------------

Auto Type:

**Optional Features**

Lead Pages **Red Arrow**

Lead Profiles

Lead Field History

Allow in Chatter Groups

Enable Learning

**Global Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this 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.

Lead 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

## 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)

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

- The browser address bar shows: sbcom-5e-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home
- The tabs bar has "Setup" and "Home" selected.
- The sidebar includes "User Interface" and "Custom Tabs and Labels".
- The main area is titled "Custom Tabs" with a sub-section "Custom Object Tab".
- A red box highlights the "New" button in the top right corner of the table.
- The table lists various custom object tabs, each with a "Label" and "Tab Style". Some tabs have a "Description" note below them.

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

The screenshot shows the "New Custom Object Tab" setup screen and the "Tab Style Selector" modal:

- New Custom Object Tab:**
  - "Step 1. Enter the Details": "Choose the custom object for this new custom tab. Fill in other details."
  - "Select an existing custom object or create a new custom object now":
    - "Object": "Total Room" (selected)
    - "Tab Style": "Keys" (selected)
  - "(Optional) Choose a Home Page Custom Link to show as a splash page the first time a user logs in": "None"
  - "Enter a short description": "Description" (empty)
- Tab Style Selector:** A modal window showing a grid of icons representing different tab styles. The "Keys" icon is highlighted.

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

SETUP Tabs

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

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

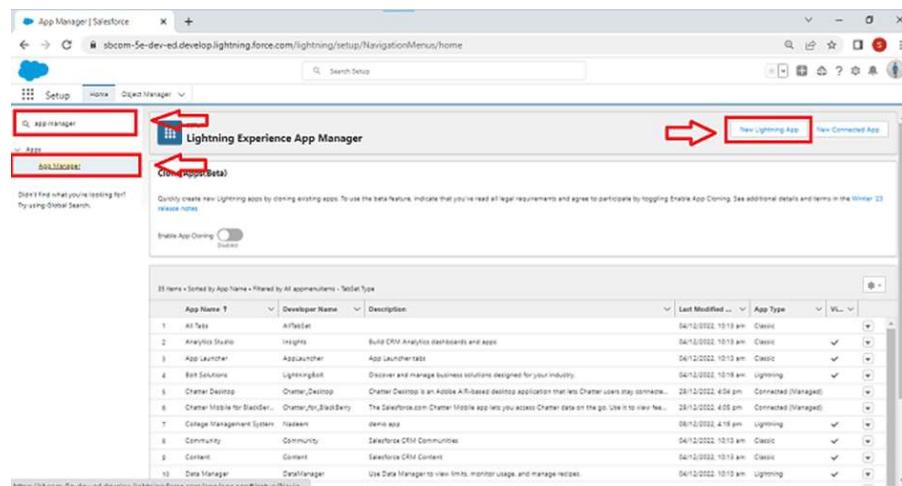
Previous Save Cancel

## 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

**Selected Items** 4

3

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

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

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  2

\* Developer Name ①

Description ①

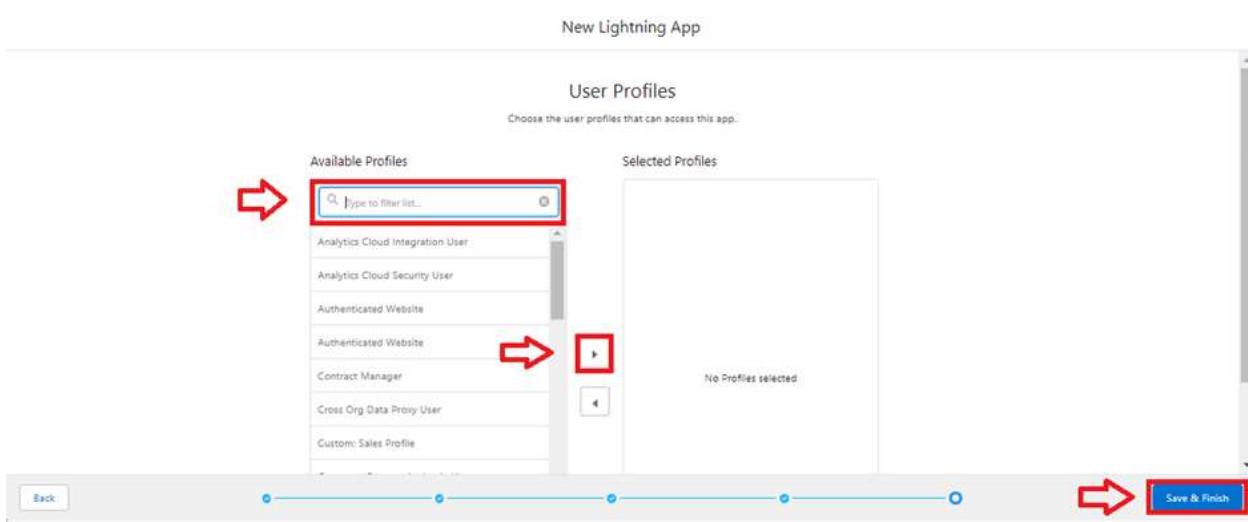
**App Branding**

Image  Primary Color Hex Value  3

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

**App Launcher Preview**

4



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 sharin
  - 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.

The screenshot shows the 'Validation Rule Edit' screen in the Salesforce Object Manager. The 'Validation Rules' tab is selected in the sidebar. The main form fields are:

- Rule Name:** checkbox field (highlighted with a red box and an arrow pointing to it)
- Active:**
- Description:** checkbox field is equal to true then only the record should be save.
- Error Condition Formula:** Example: Discount\_Percent\_\_c<0.30. More Examples. Display an error if Discount is more than 30%. If this formula expression is true, display the text defined in the Error Message area.  
Formula: Advance\_payment\_for\_1month\_\_c = false (highlighted with a red box and an arrow pointing to it)
- Functions:** All Function Categories dropdown, showing ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, Insert Selected Function, ABS(number), Returns the absolute value of a number, a number without its sign.
- Error Message:** Example: Discount percent cannot exceed 30%. This message will appear when Error Condition formula is true.  
Message: checkbox should be checked (highlighted with a red box and an arrow pointing to it)
- Error Location:** Top of Page (radio button) is selected, Field/Advance payment for 1month (radio button) is unselected.

## **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 'Total Rooms' row on the right, indicating a comparison or transfer of permissions. At the bottom of the interface, there are 'Session Settings' and 'Password Policies' sections.

## 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 sidebar, under the 'Users' section, the 'Roles' link is highlighted with a red box and a red arrow pointing to it. The main content area displays a 'Sample Role Hierarchy' diagram. At the top is the 'Executive Staff' role, which includes 'CEO President' and 'CFO VP, Sales'. Below them are 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each of these three roles oversees several 'Sales Rep' positions: 'Western Sales Rep' (CA Sales Rep, OR Sales Rep), 'Eastern Sales Rep' (NY Sales Rep, MA Sales Rep), and 'International Sales Rep' (Asian Sales Rep, European Sales Rep). To the right of the hierarchy, there is a legend explaining permissions: 'View & edit data, roll up forecasts, & generate reports for all users below' and 'Can't access data of other Executive Staff'. At the bottom right of the page, there is a 'Set Up Roles' button highlighted with a red box and a red arrow pointing to it.

The screenshot shows the Salesforce Role Edit page for a 'New Role'. The title bar says 'SETUP Roles' and 'New Role'. The main form is titled 'Role Edit' and contains the following fields:

- Label:** Marketing (highlighted with a red box and a red arrow pointing to it)
- Role Name:** Marketing (highlighted with a red box and a red arrow pointing to it)
- This role reports to:** CEO (highlighted with a red box and a red arrow pointing to it)
- Role Name as displayed on reports:** \_\_\_\_\_

At the bottom of the form are three buttons: 'Save' (highlighted with a red box and a red arrow pointing to it), 'Save & New', and 'Cancel'.

## 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, all of which are highlighted with a red box and an arrow pointing to them. The 'User Edit' section on the right contains fields for Role, User License, and Profile, which are also highlighted with a red box and an arrow pointing to them. Both sections contain the values: Role = CEO, User License = Salesforce, and Profile = Custom user.

## 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

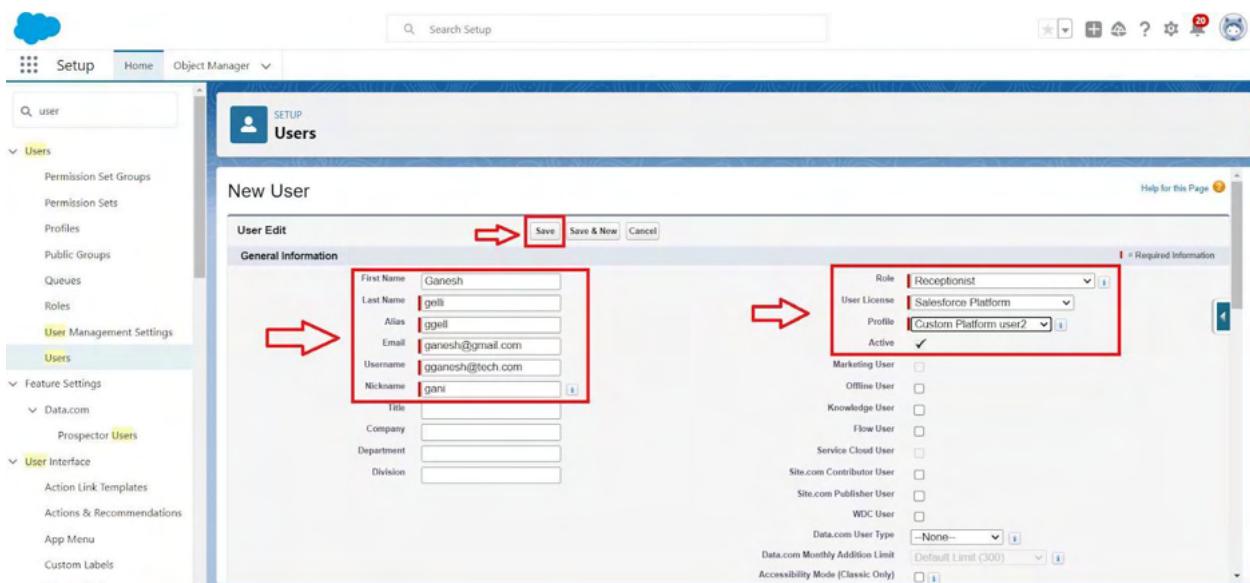
The screenshot shows the 'User Edit' page for a user named 'abhilash garapati'. The page is divided into sections: 'General Information' and 'Marketing User' (which is the active profile). Red arrows and boxes highlight specific fields:

- A red arrow points from the 'First Name' field (containing 'Abhilash') in the 'General Information' section to the 'Save' button at the top right.
- A red box surrounds the 'General Information' section, and a red arrow points from its bottom right towards the 'Marketing User' section.
- A red box surrounds the 'Marketing User' section, and a red arrow points from its top left towards the 'Save' button.
- Red boxes also highlight the 'Role' dropdown set to 'Marketing', the 'User License' dropdown set to 'Salesforce Platform', and the 'Profile' dropdown set to 'Customer Platform user1'.

Other visible fields include 'Last Name' (garapati), 'Alias' (agara), 'Email' (abhi@gmail.com), 'Username' (gabhi@tech.com), 'Nickname' (abhi), 'Title' (empty), 'Company' (empty), 'Department' (empty), 'Division' (empty), 'Marketing User' (checkbox checked), 'Offline User' (checkbox unselected), 'Knowledge User' (checkbox unselected), 'Flow User' (checkbox unselected), 'Service Cloud User' (checkbox unselected), 'Site.com Contributor User' (checkbox unselected), 'Site.com Publisher User' (checkbox unselected), 'WDC User' (checkbox unselected), 'Data.com User Type' (dropdown set to 'None'), 'Data.com Monthly Addition Limit' (dropdown set to 300), and 'Accessibility Mode (Classic Only)' (checkbox unselected).

## 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)

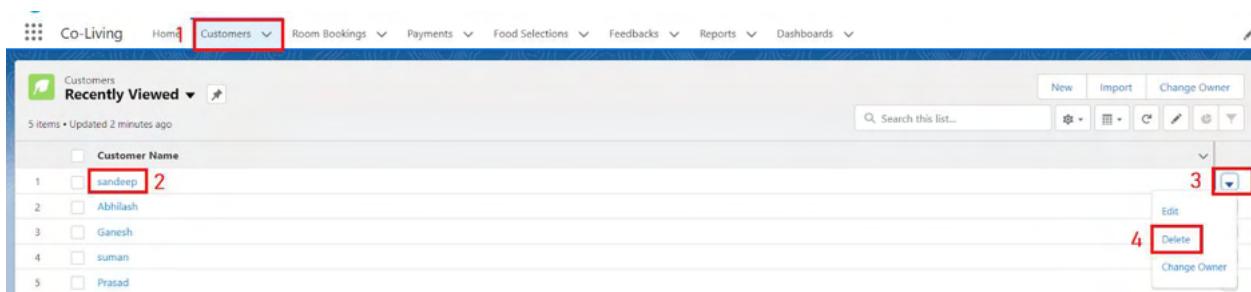
1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it
3. Click on the Customers Tab.
4. Click new and fill details & Save

### 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 are navigation links: Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is highlighted with a red box), and Dashboards. Below this is a search bar with the placeholder 'Search recent reports...' and a 'New Report' button, also highlighted with a red box. On the left, there's a sidebar with categories: Reports, Recent (highlighted with a red box), Created by Me, Private Reports, Public Reports, and All Reports. The main area displays a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Three specific rows are highlighted with red boxes: 'Room booking report' (custom report), 'Room booking report' (Private Reports), and 'Sample Flow Report: Screen Flows' (Public Reports).

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 is a sidebar with categories: Recently Used, All (highlighted with a red box), Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets. To the right is a search panel with a search bar containing 'customers' (highlighted with a red box) and a list of report types. The list includes: Activities with Customers, Customers (highlighted with a red box), Customers with Room Bookings and Total Rooms (highlighted with a red box), Customers with Payments, Customers with Payments and Room Booking, Customers with Food Selections, Total Rooms with Room Bookings and Customers, Customers with Room Bookings with Total Rooms, and Customers with Room Bookings with Payments. The 'Category' column indicates whether each report is Standard or Custom. A red box highlights the dropdown arrow next to the 'Customers with Room Bookings and Total Rooms' entry.

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.

The screenshot shows a report configuration interface with the following components:

- REPORT Outline:** Shows the current report structure: "Room booking report" under "Customers with Room Bookings with Payments".
- Fields pane:** On the left, it includes:
  - Groups:** Options to "GROUP ROWS" (selected), "Add group...", and "Customer Name".
  - Columns:** Options to "Add column..." and a list of available columns: Room No, Phone no, Email id, Permanent Address, current Status, Room sharing, # Advance payment for 1month, # AC - 3000, and # Amount.
- Preview pane:** A grid titled "Customers with Room Bookings with Payments" showing data for 10 rows. The columns correspond to the ones listed in the Fields pane. Red arrows point to the "Customer Name" field in the Groups section and the "# Amount" field in the Columns section.
- Top right buttons:** Save (highlighted with a red box), Close, and Run.
- Bottom buttons:** Row Counts, Detail Rows, Subtotals, Grand Total, and Conditional Formatting.

## 12.Dashboards

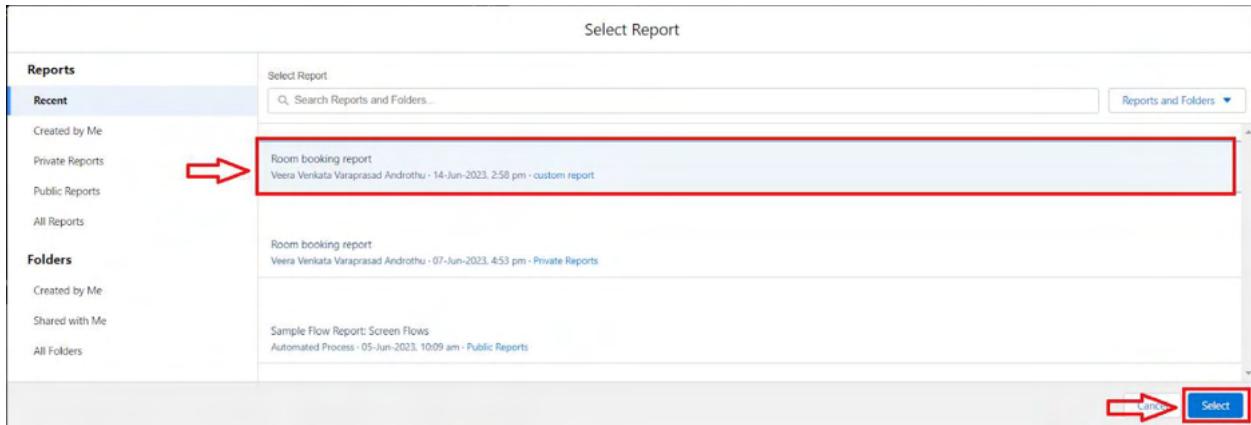
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing 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 a software application interface for managing dashboards. At the top, there's a navigation bar with various menu items like 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 is a search bar labeled 'Search recent dashboards...' with the number '2' next to it. A red box highlights the 'New Dashboard' button. The main area is titled 'DASHBOARDS' and contains columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A modal window titled 'New Dashboard' is open in the center. It has a red box around the 'Name' input field, which contains the text 'custom Dashboard'. Another red box highlights the 'Create' button at the bottom right of the modal. Red arrows point from the numbered steps in the instructions to the corresponding elements in the screenshot.

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



**Edit Component**

Room booking report

Subtitle

Amount

Footer

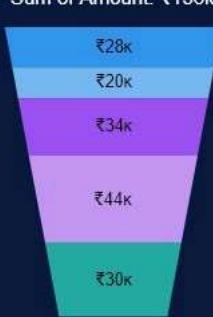
Legend Position

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.