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

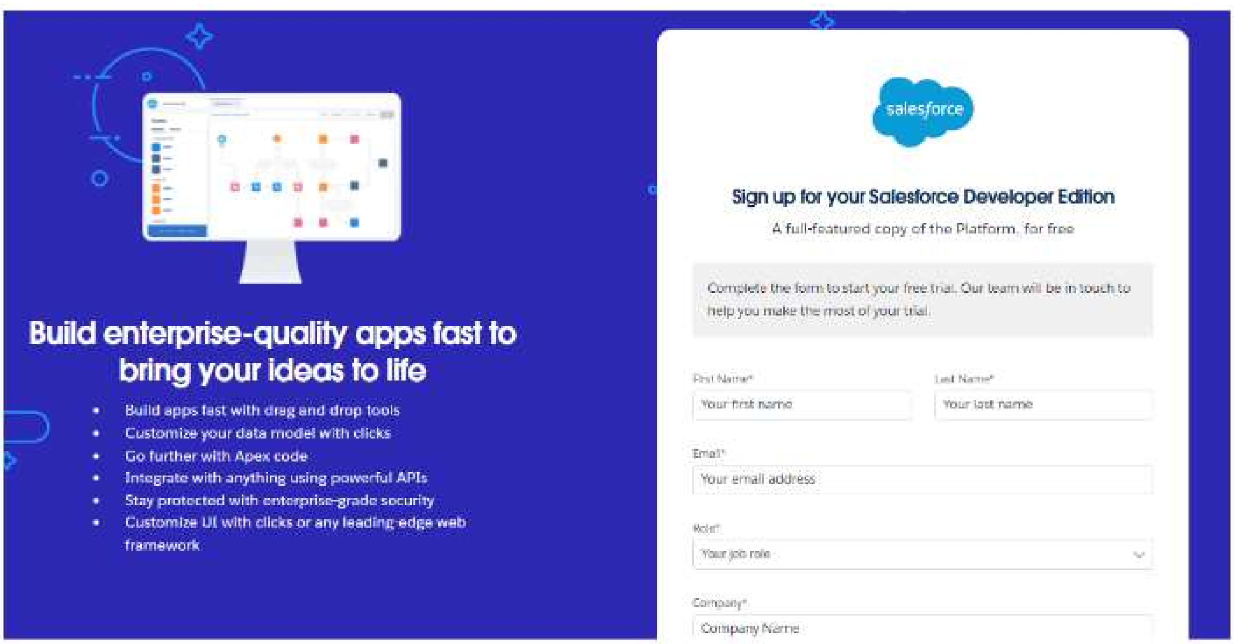
1.Creating a Developer Account in Salesforce

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
cllick 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

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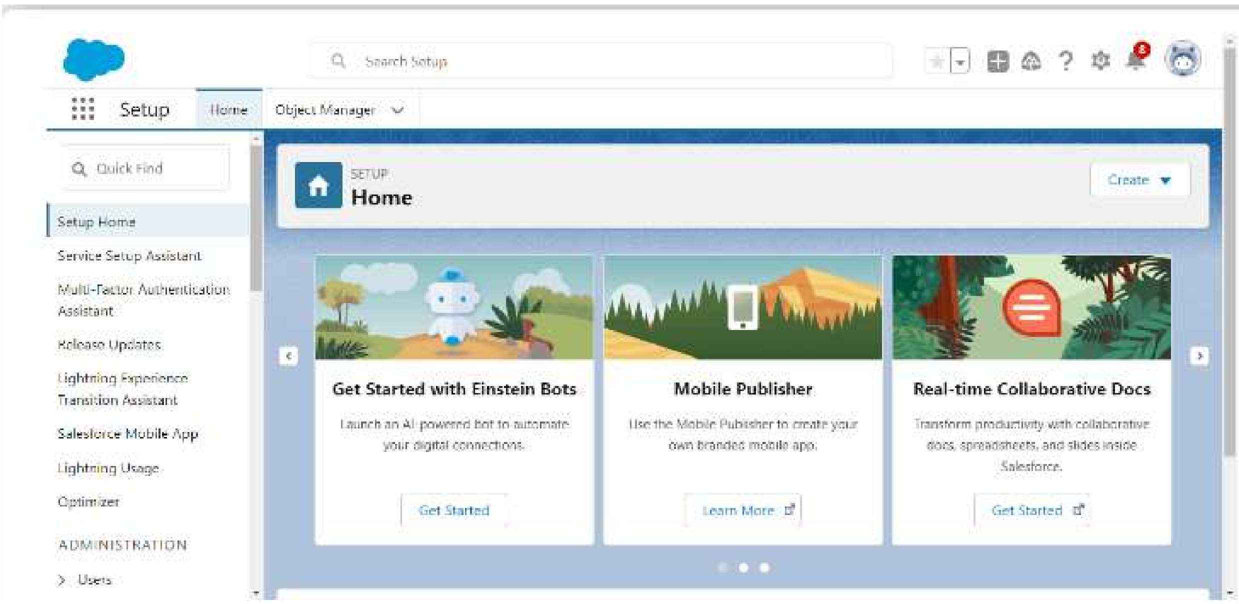


2.Click on verify account

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

2.OBJECT

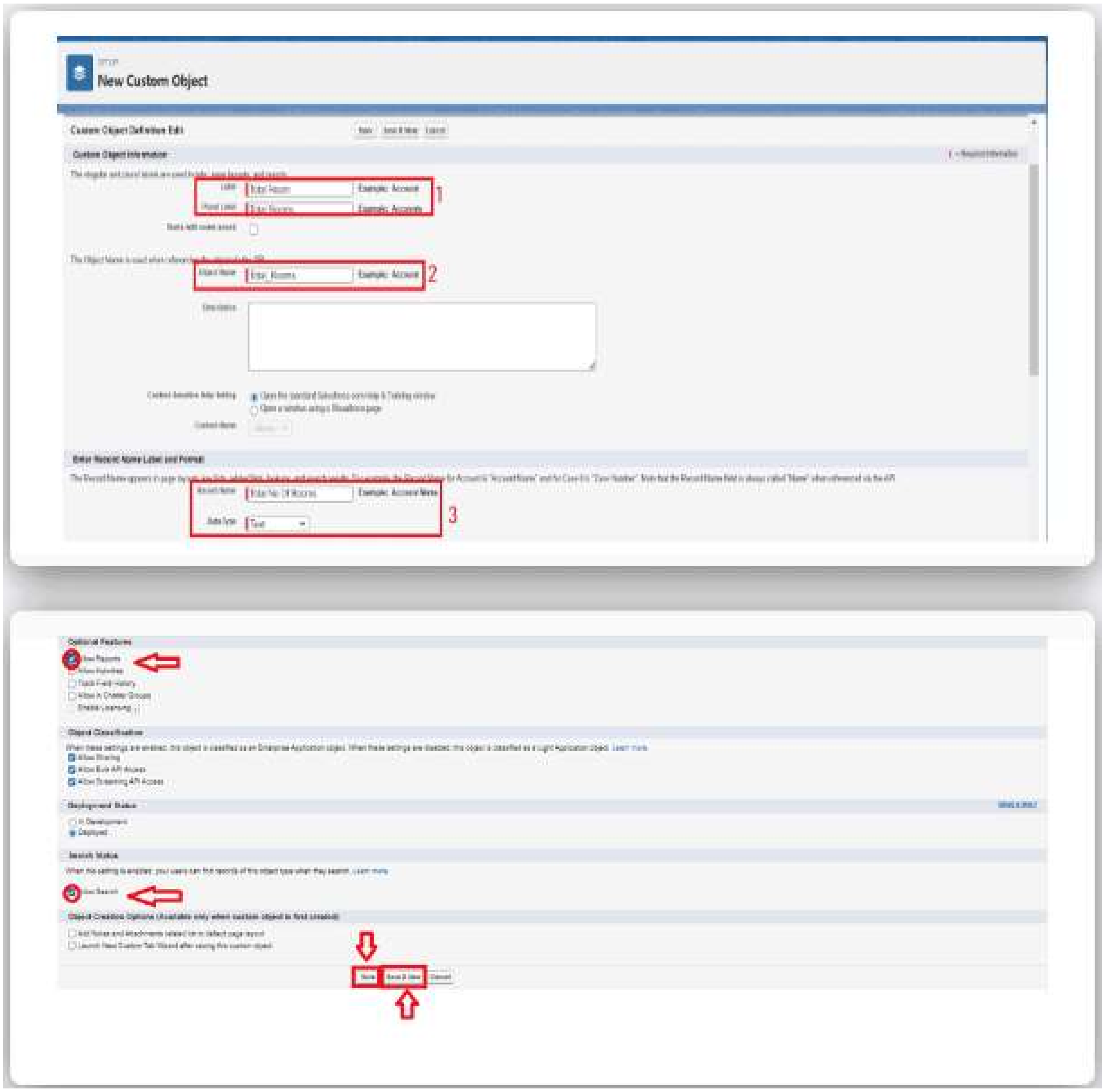
Create a custom object for Total Rooms

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.

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 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:

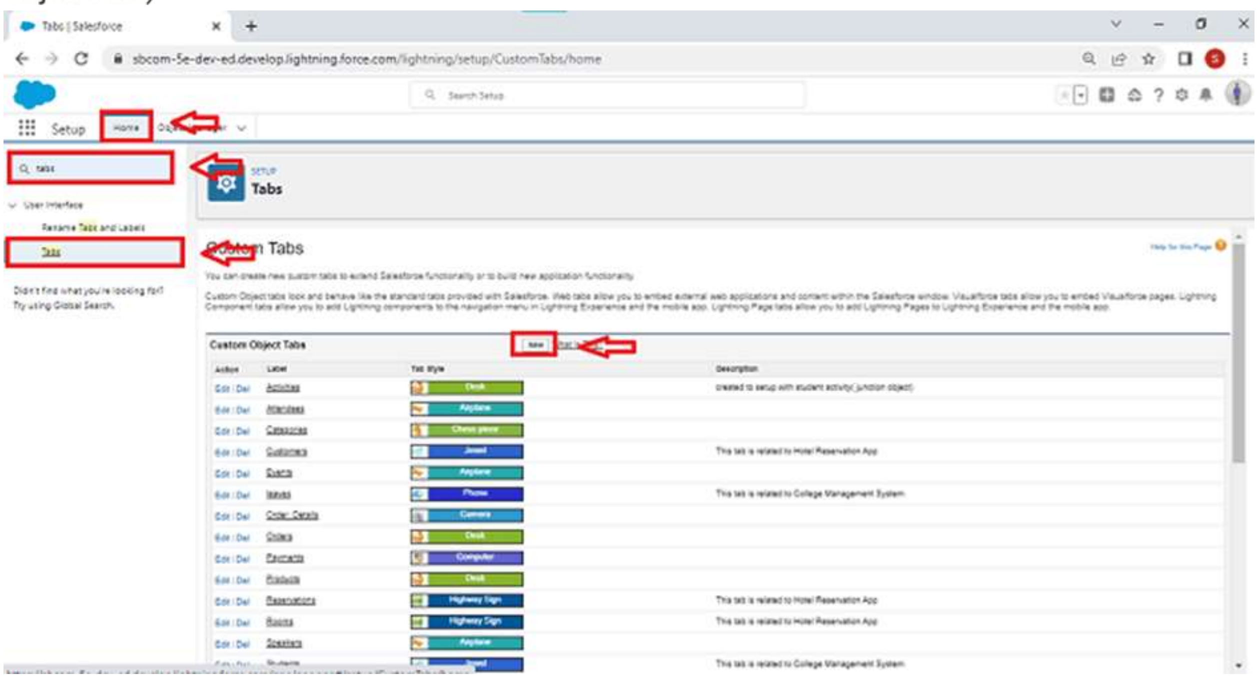
1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Feedback ".
4. Fill in the plural label as " Feedbacks ".
5. Record name: "Feedback No "
6. Select the data type as "Auto number ".
7. Under Display format enter Fd No-{0000}
8. Enter starting Number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

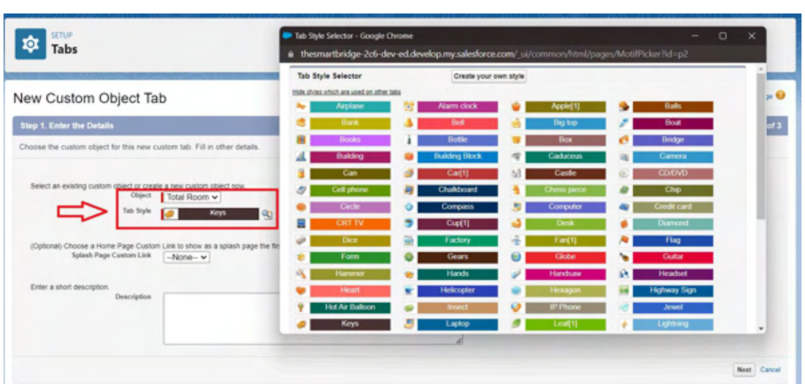
Creating a Tab for Total Rooms

To create a Tab:(Total Rooms)

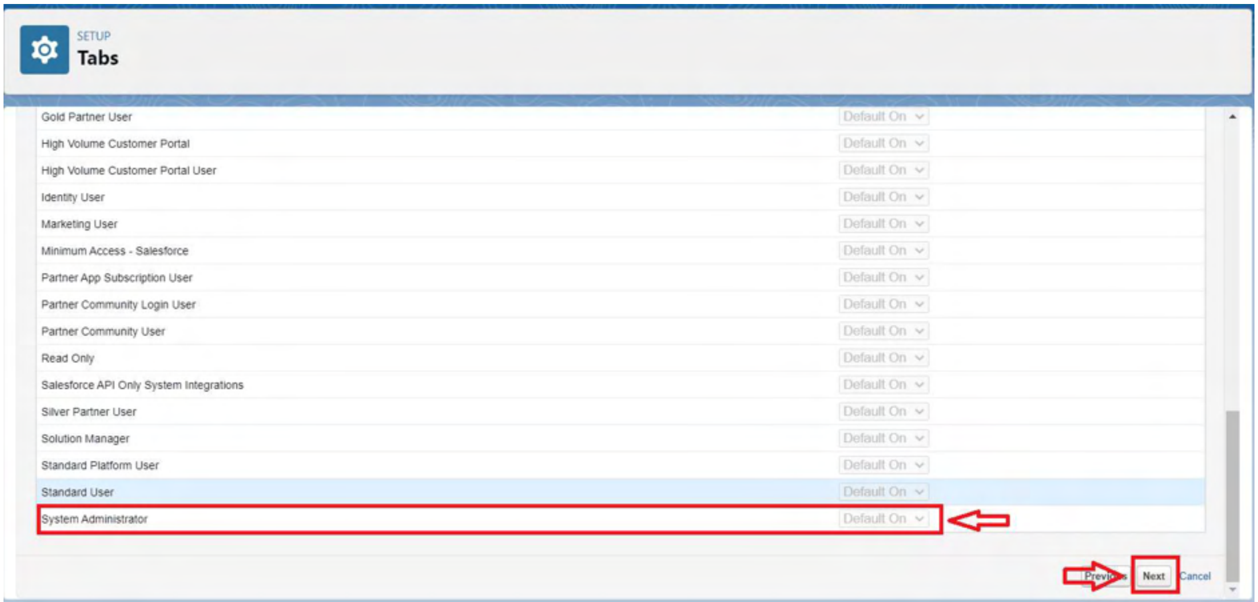
1. Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)



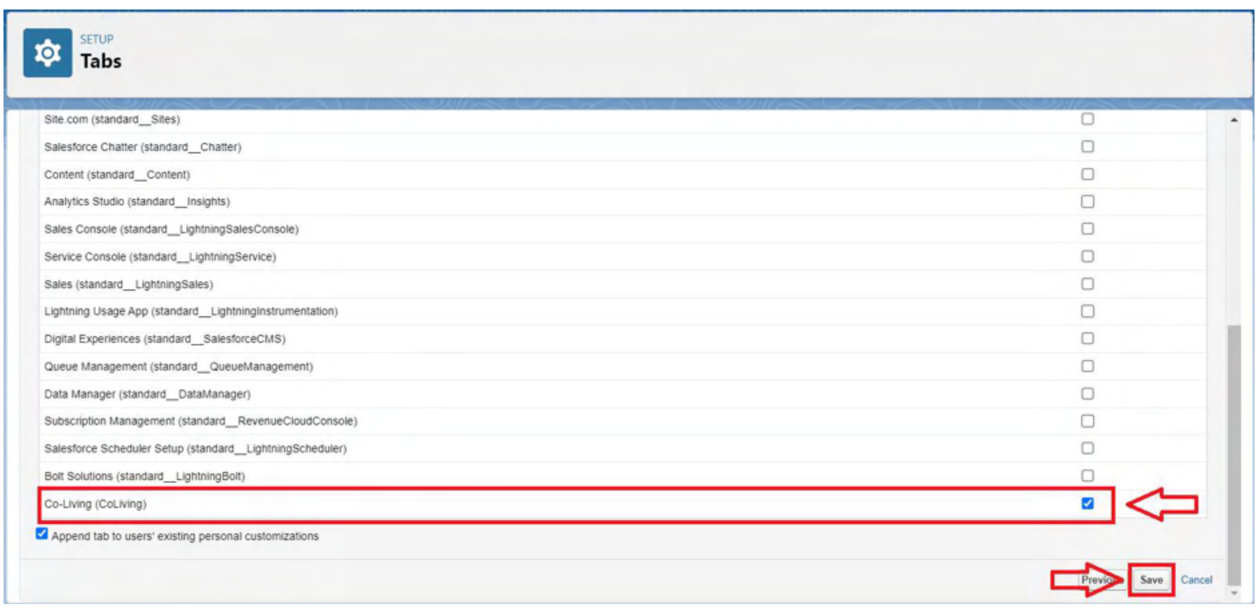
2. Select Object(Total Rooms) > Select the tab style.



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



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

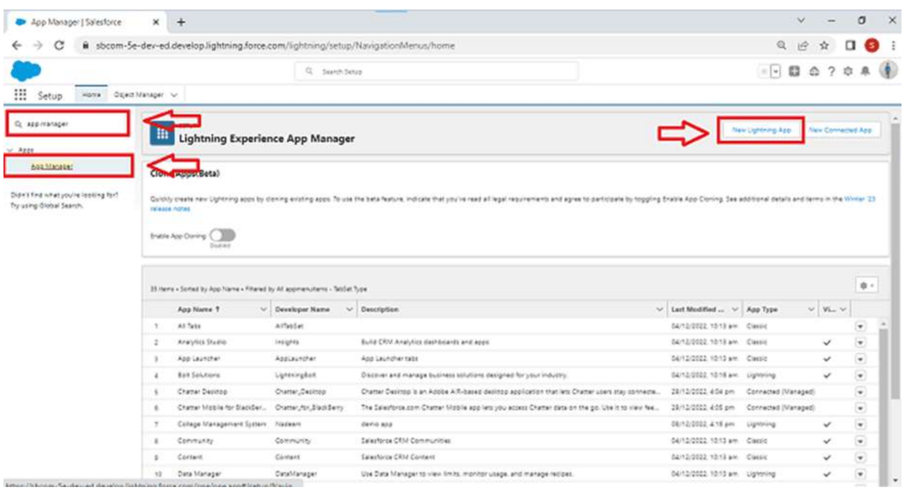


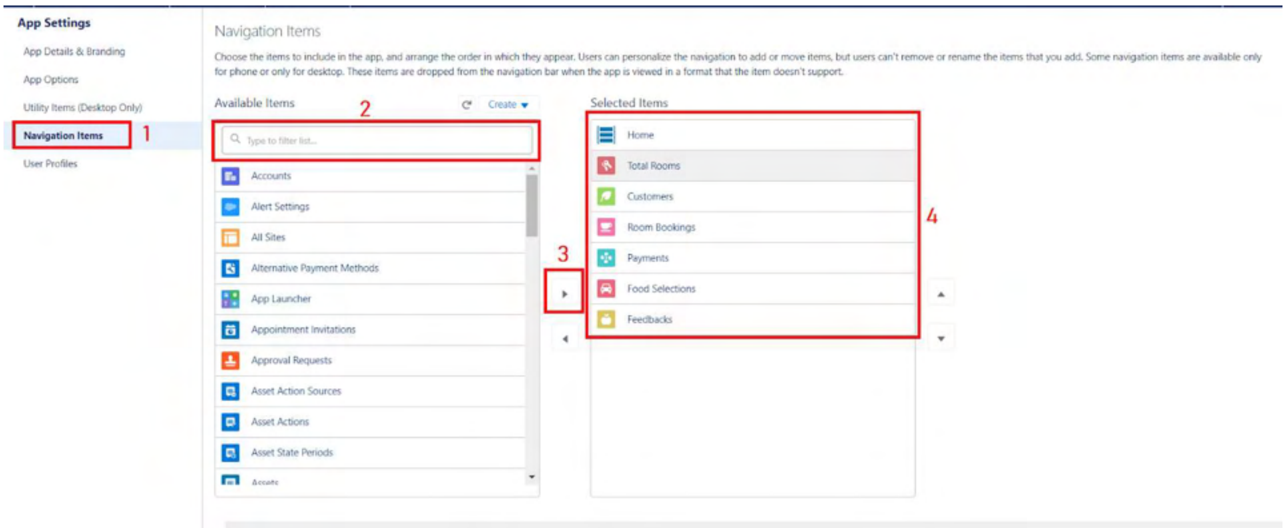
4.LIGHTNING APP

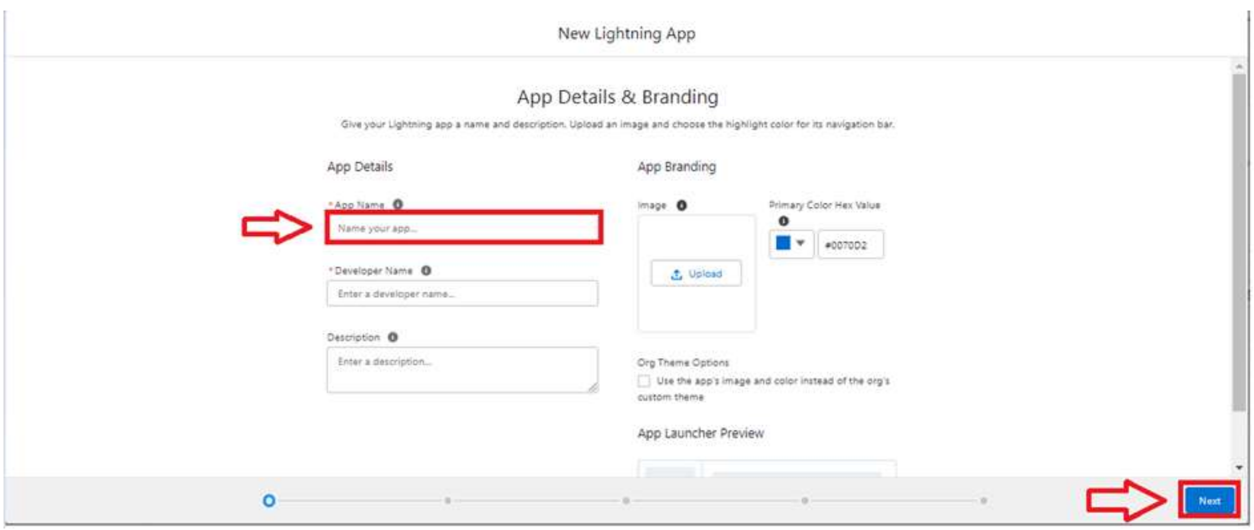
Create a Lightning App

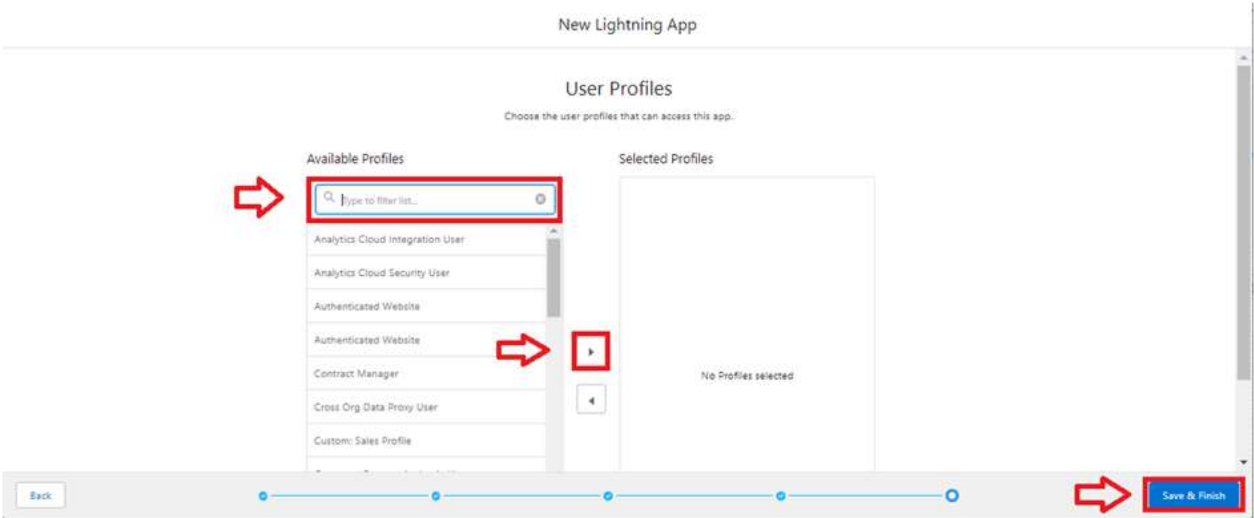
To create a lightning app page:

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
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
Create
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
Selected Items
Home
Total Rooms
Customers
Room Bookings
Payments
Food Selections
Feedbacks
1
2
3
4


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
Name your app...
* Developer Name
Enter a developer name...
Description
Enter a description...
App Branding
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
Next



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:

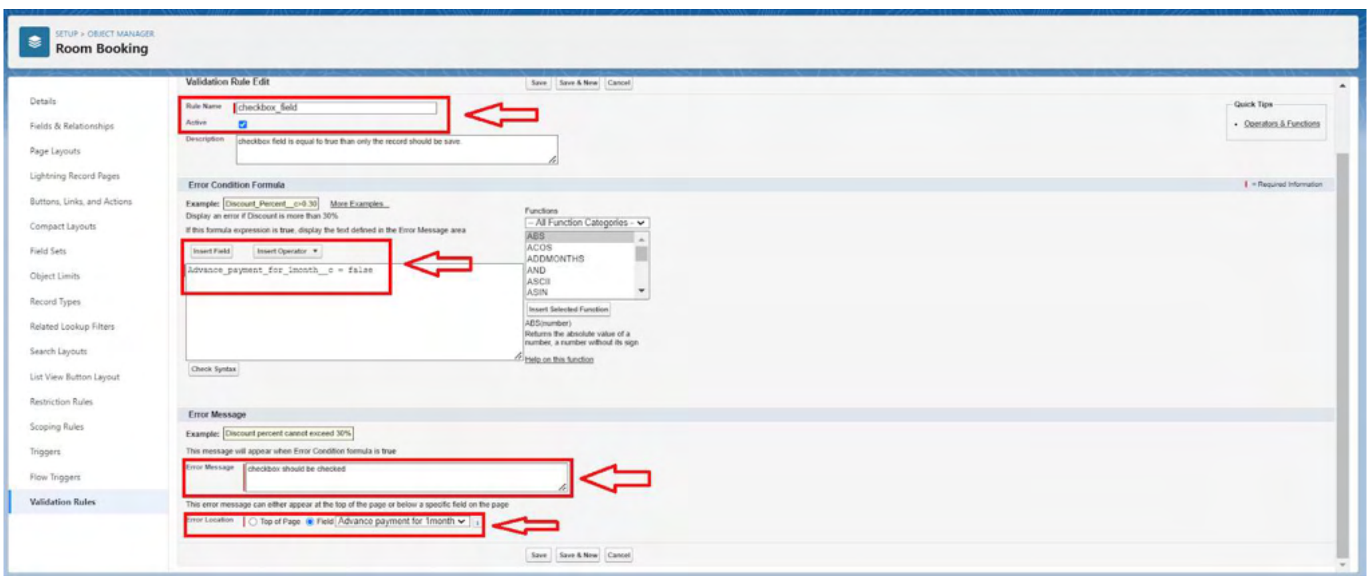
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" ? New
3. Select Data Type as a "Checkbox"
4. Click on Next
5. Fill the Above as following:

- 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.



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.

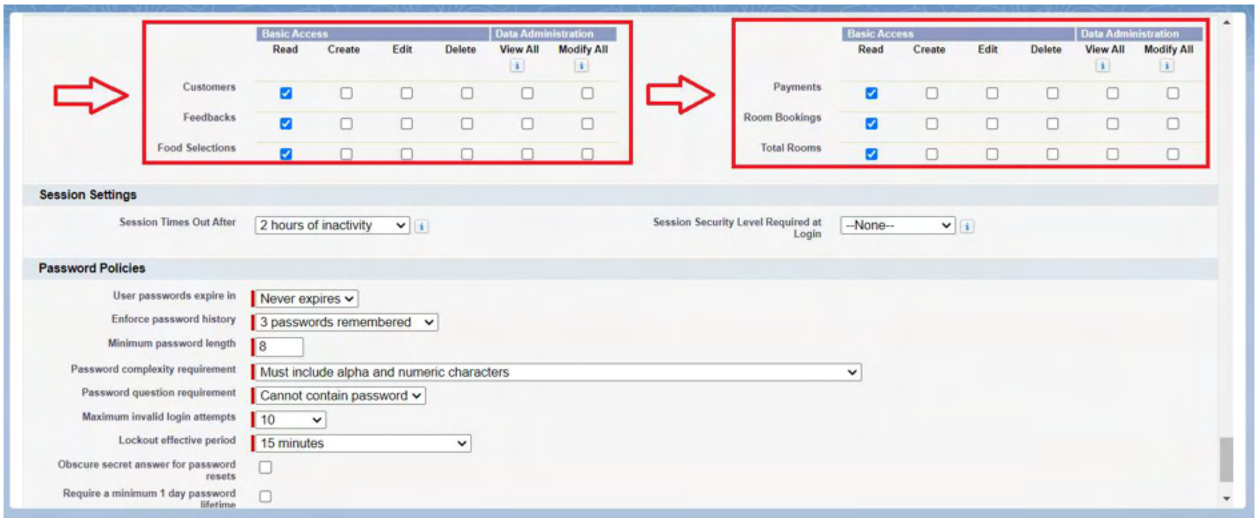
They can be deleted if there are no users assigned with that particular one.

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.

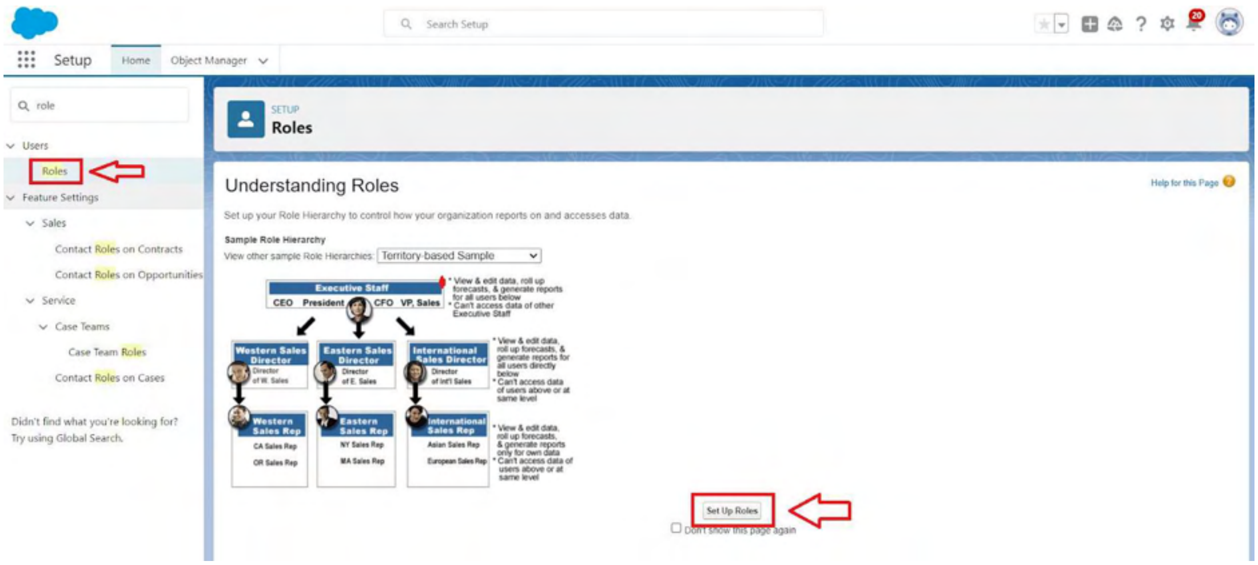
5. Scroll down and Click on Save.
6.

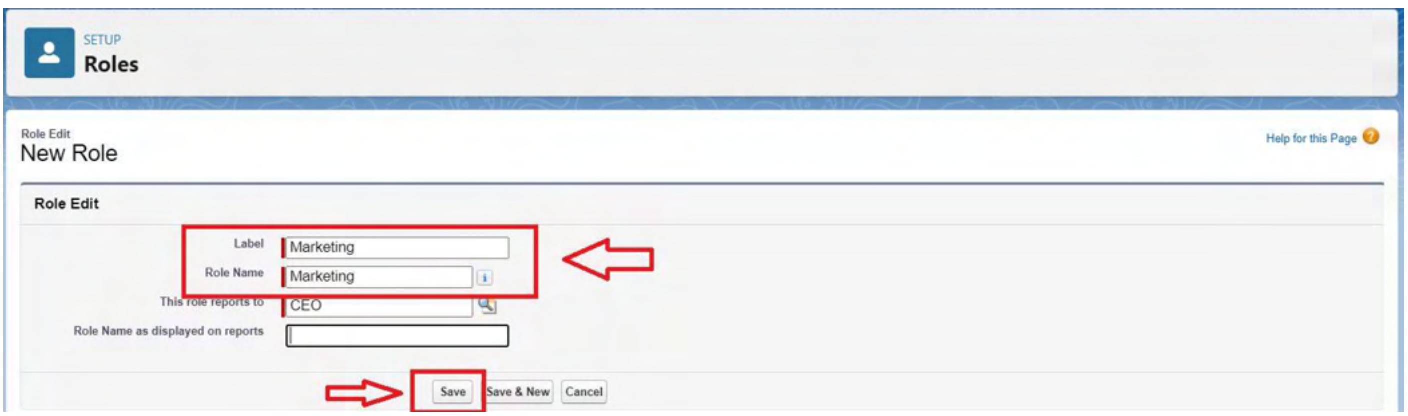


8.ROLES

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.





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.

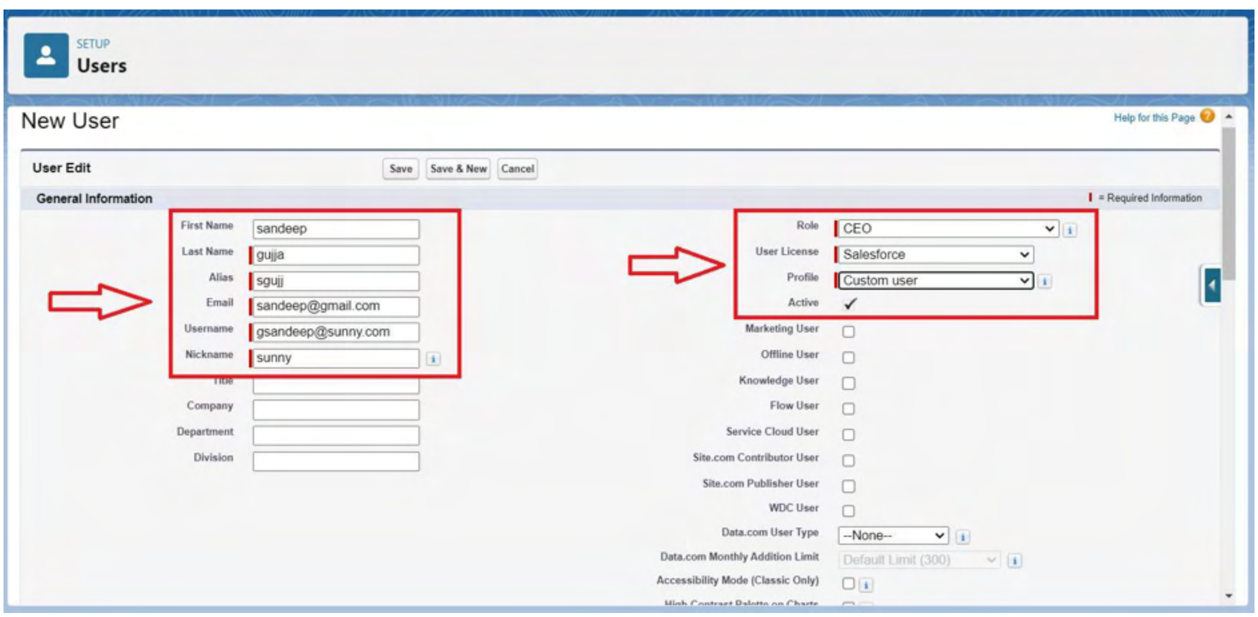
9.USERS

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

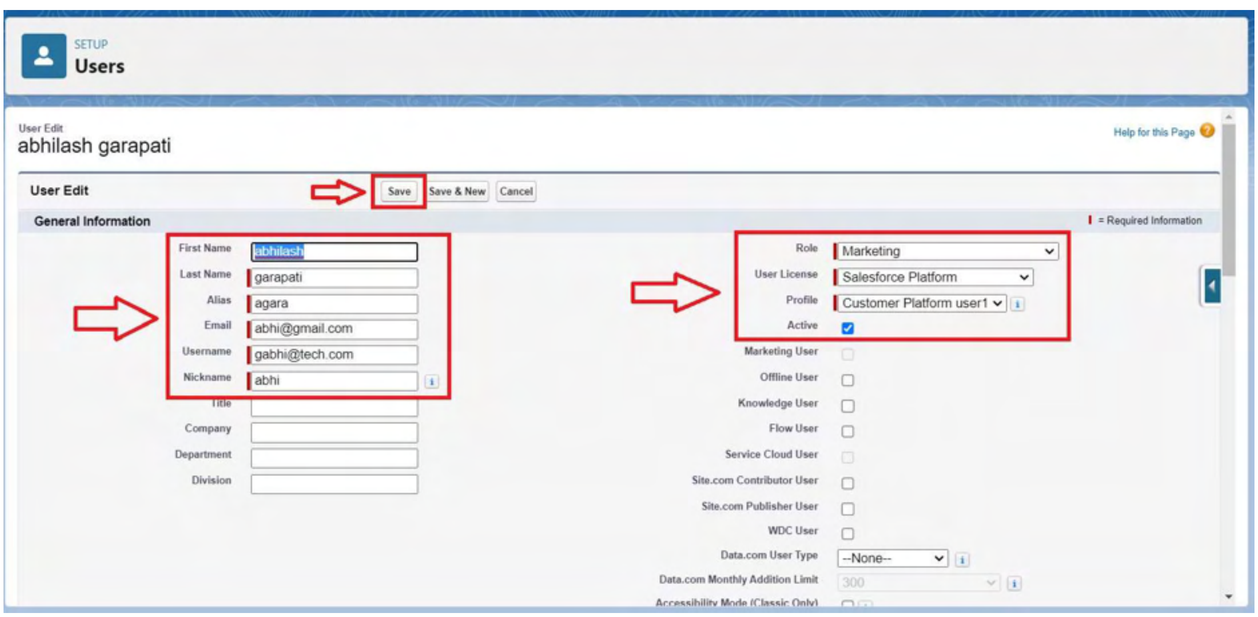
3.save.



Create Another User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields

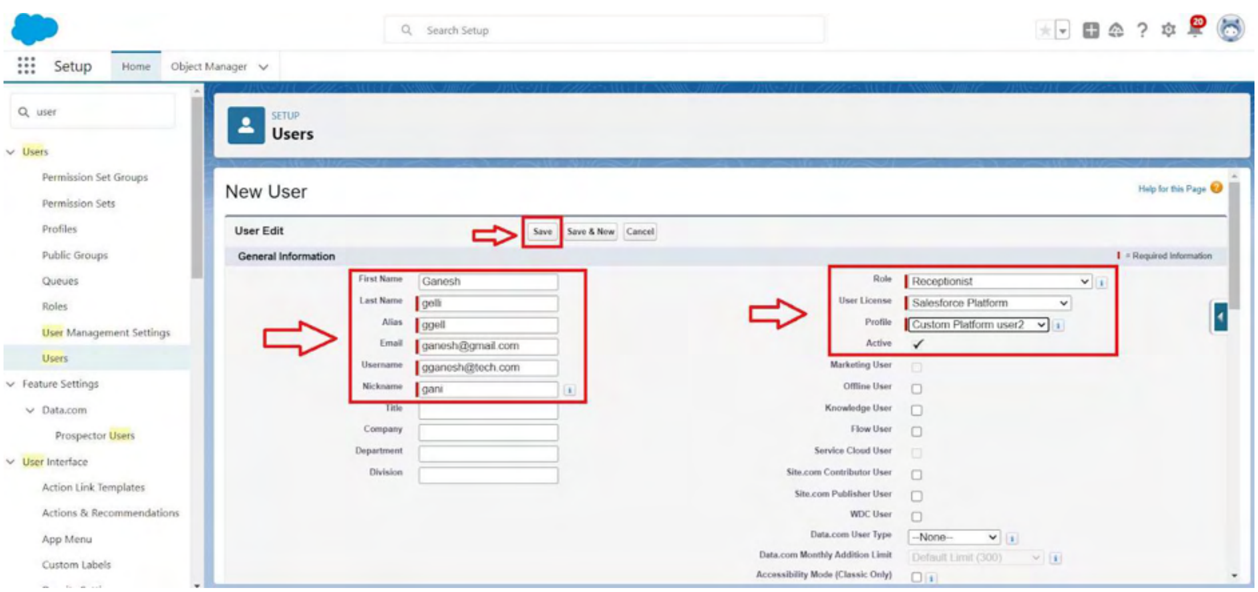
- First Name : Abhilash
- Last Name : Garapati
- Alias : Give a Alias Name
- Email id : Give your Personal Email id
- Username : Username should be in this form: text@text.com
- Nick Name : Give a Nickname
- Role : Marketing
- User licence: Salesforce platform
- Profiles : Custom Platform User1



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)

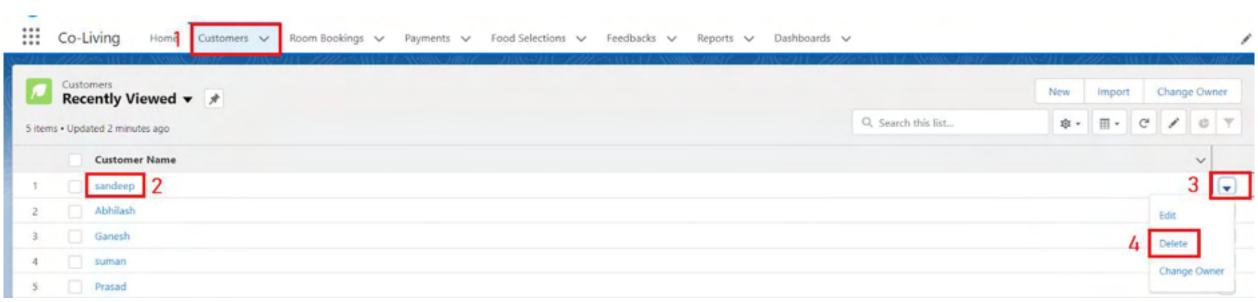
1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it
3. Click on the Customers Tab.
4. Click new and fill details & Save

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)

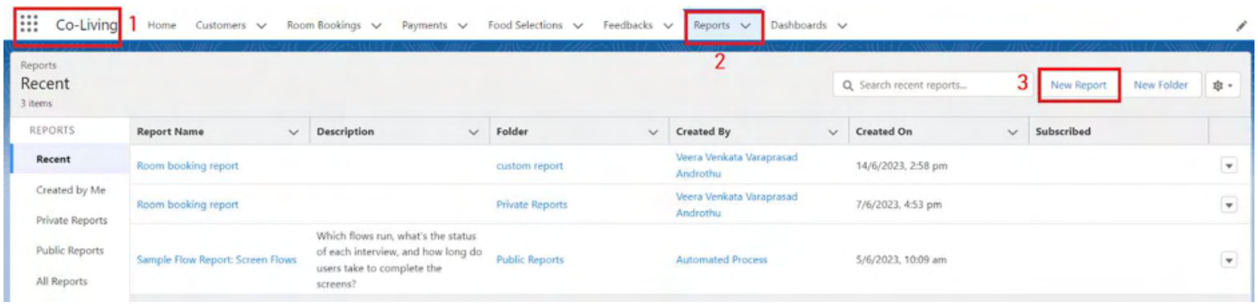
1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on the Customers Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



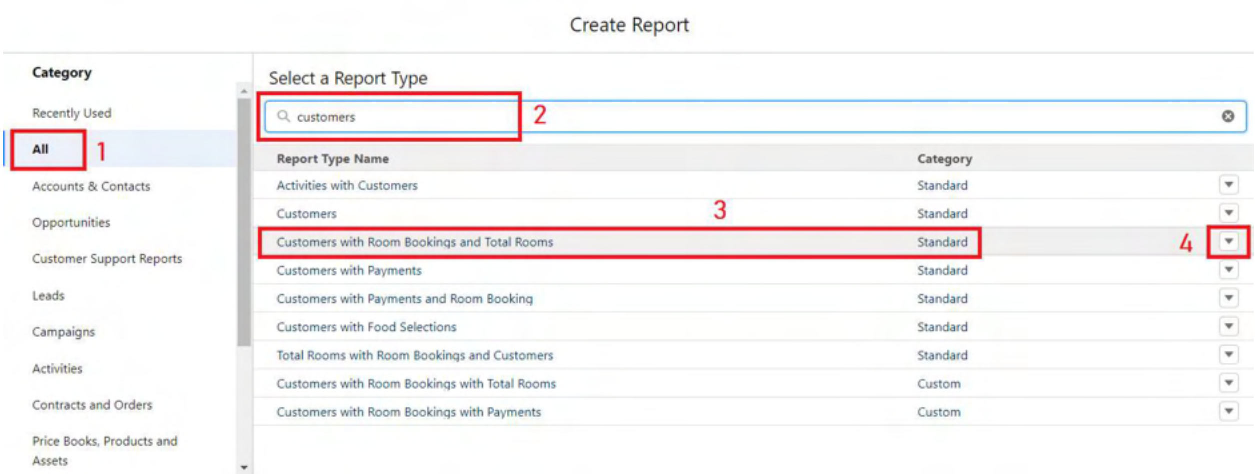
11.REPORTS

Create Report

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



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.



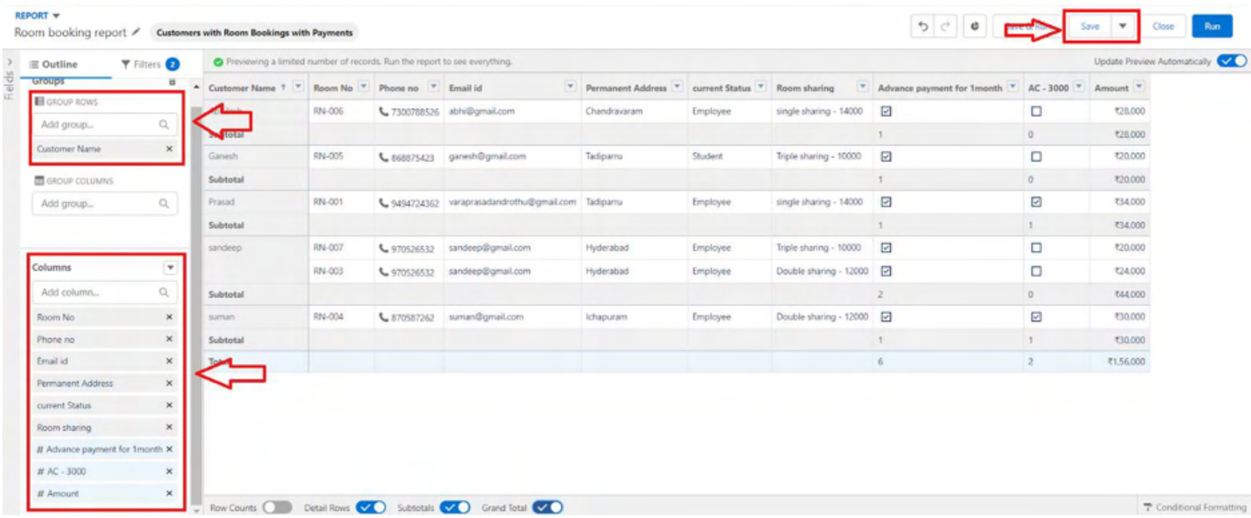
4. Customize your report
5. Add fields from left pane as shown below
6. Save or run it.

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.

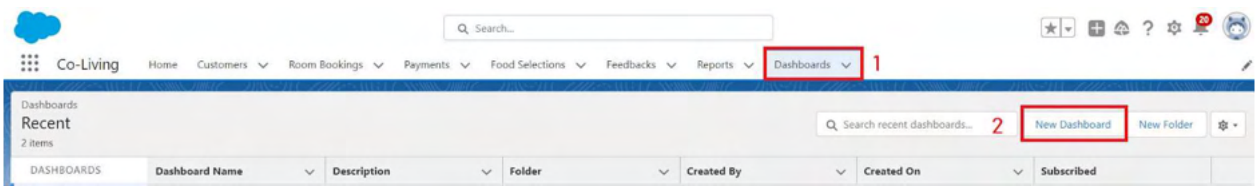


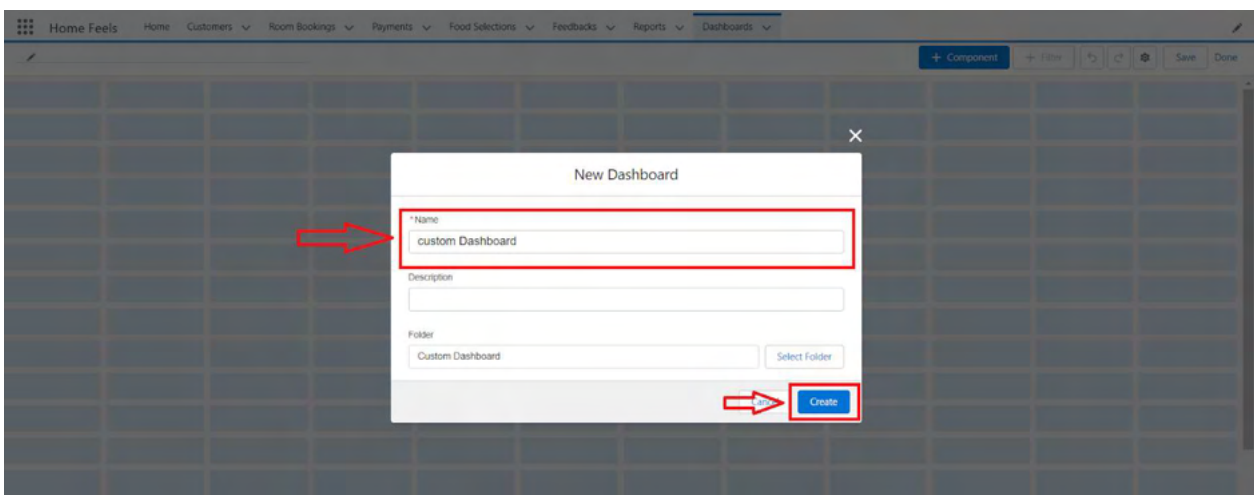
12.Dashboards

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.

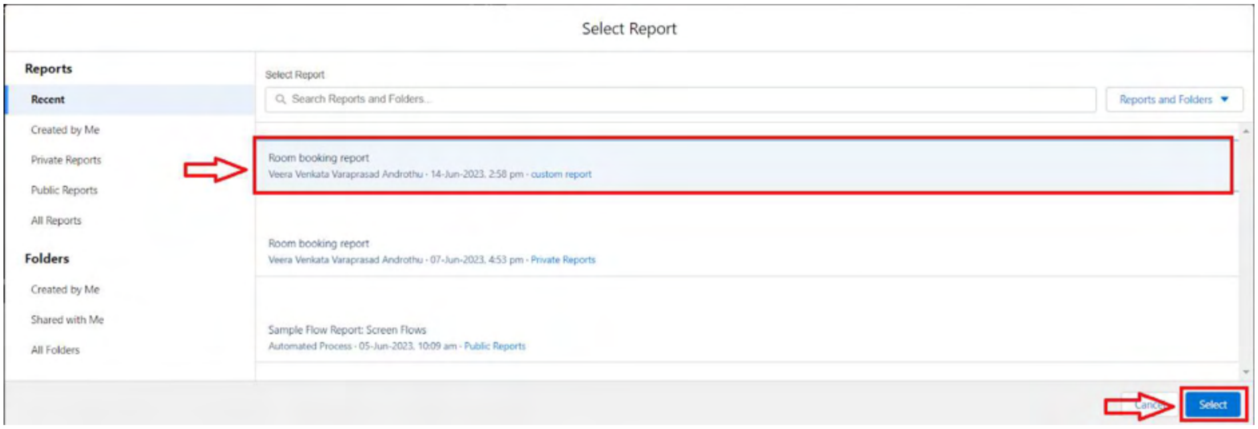
Create Dashboard

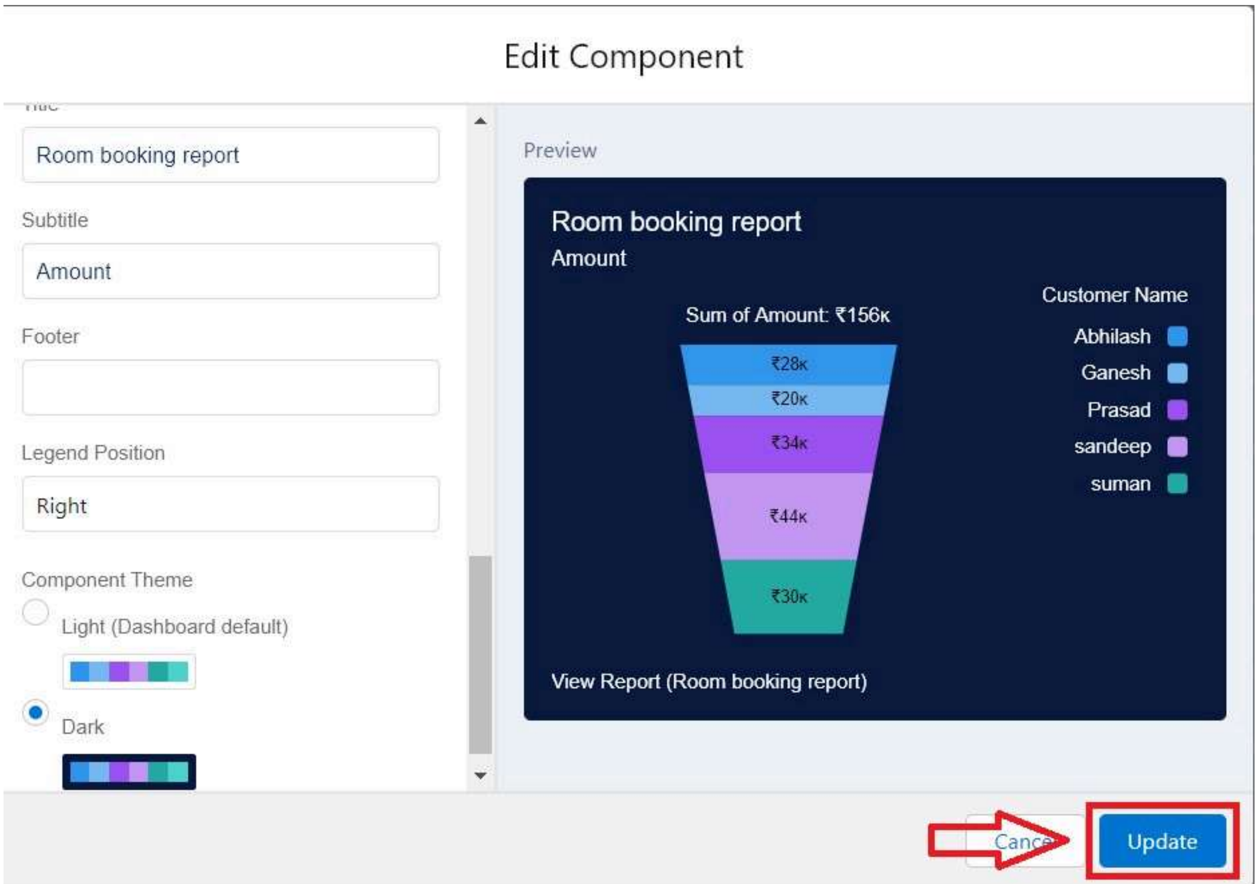
1. Go to the app > click on the Dashboard tabs and click on new Dashboard
2. Give a Name and click on Create.





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





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.