



COLIVING

CRM Application to Manage the Booking of Co-Living

Report Documentation

Project Name: A CRM Application to Manage the Booking of Co-Living

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PROJECT ABSTRACT

Our Co-Living Space CRM Application aims to transform the management and living experience of co-living spaces by leveraging the powerful capabilities of Salesforce. This project will create a vibrant and inclusive community environment where individuals can live, work, and connect with like-minded people, enhancing collaboration and reducing isolation. The application will feature a streamlined booking system for various AC room configurations with multiple sharing options, allowing residents to select their preferred accommodations easily. Additionally, it will enable residents to choose special food items daily and make payments through multiple modes, ensuring a personalized and convenient living experience. A robust feedback system will be implemented, allowing residents to rate and review services such as room cleaning, internet connectivity, and food quality, ensuring continuous improvement. The application will also facilitate community engagement by organizing events and activities, fostering a sense of belonging and collaboration among residents. Utilizing Salesforce's admin capabilities, custom objects and fields will be created to capture detailed customer information, and workflow automation will streamline booking, payment processing, and feedback collection. Comprehensive reports and dashboards will monitor occupancy rates, customer satisfaction, and service quality metrics. Overall, the Co-Living Space CRM Application will significantly improve resident satisfaction, enhance operational efficiency, and build a thriving community for all residents.

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INTRODUCTION

The Co-Living Space CRM Application, built on Salesforce, aims to enhance the management and resident experience of co-living spaces. By streamlining room bookings, enabling daily special food selections, offering multiple payment modes, and incorporating a feedback system, the application ensures a personalized and convenient living environment. Additionally, it fosters community engagement through organized events and activities, creating a vibrant and inclusive community where individuals can live, work, and connect with like-minded people. Utilizing Salesforce's robust capabilities, the application promises improved resident satisfaction, operational efficiency, and continuous service improvement.

Task 1: Salesforce

Step1: Creating Developer Account Creating a developer org in salesforce

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

2. 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

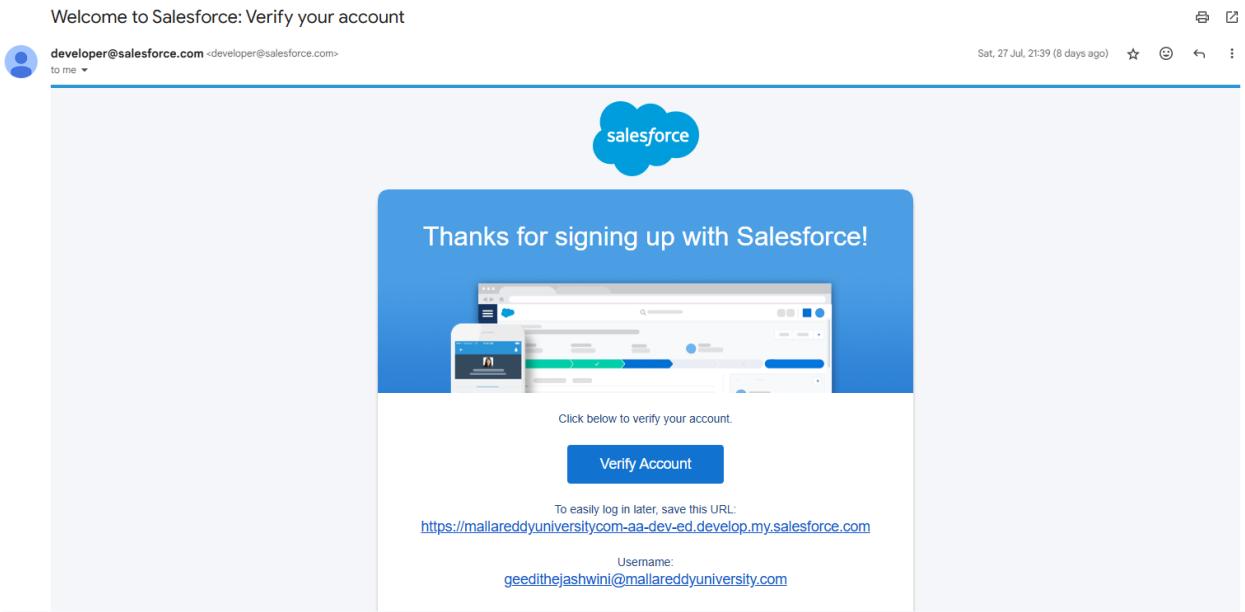
3. Click on sign me up after filling these

Step2: Account Activation

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

2. Click on Verify Account and set password

3. Then you will redirect to your salesforce setup page.



Cloud icon

Search Setup

Setup Home

Home Object Manager ▾

Quick Find

SETUP Home

Create ▾

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

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Use the Mobile Publisher to create your own branded mobile app.

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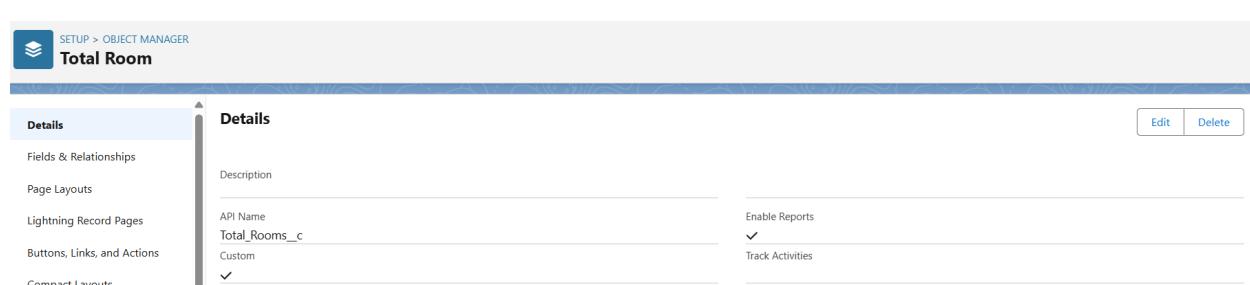
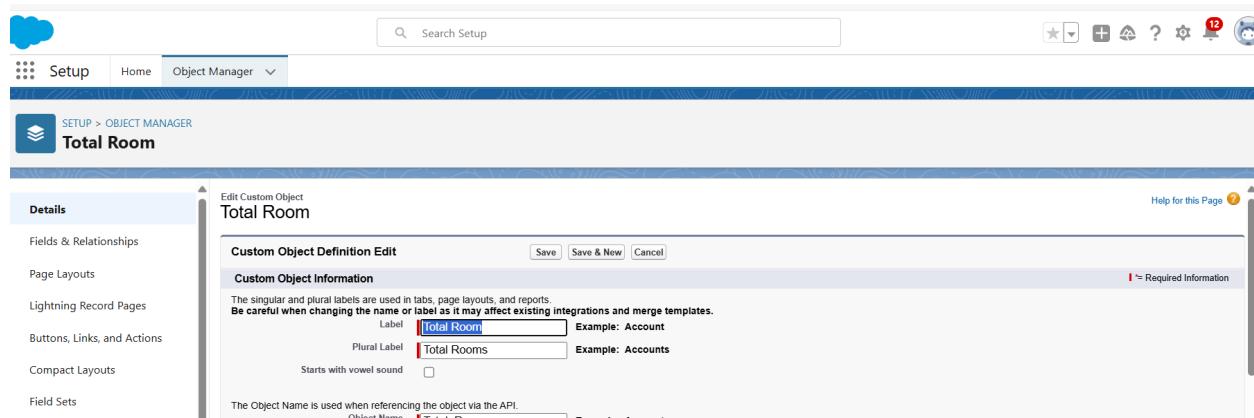
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Task-2:Object

Step1:Create a custom object for Total Rooms

- 1.To create a custom object, follow these steps: 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".
- In the Optional Features section, select Allow Reports and Track Field History. In the Deployment Status section, ensure Deployed is selected.
- In the Search Status section, select Allow Search. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
- Leave everything and save.



Step2:Create custom objects same as above steps for Customer,Room booking,Payments,Feedback,Food Selection.

Room Booking

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name Room_Booking__c
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label Room Booking
Field Sets	Plural Label Room Bookings
Object Limits	
Record Types	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	

Customer1

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name Customer1__c
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label Customer1
Field Sets	Plural Label Customer1s
Object Limits	
Record Types	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	

Feedback

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name Feedback__c
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label Feedback
Field Sets	Plural Label Feedbacks
Object Limits	
Record Types	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	

The image contains two side-by-side screenshots of the Salesforce Object Manager setup page.

Screenshot 1: Food Selection

- Left sidebar:** Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters.
- Details panel:**
 - Description: [empty]
 - API Name: Food_Selection__c
 - Custom: ✓
 - Singular Label: Food Selection
 - Plural Label: Food Selections
 - Enable Reports: ✓
 - Track Activities: ✓
 - Track Field History: ✓
 - Deployment Status: Deployed
 - Help Settings: Standard salesforce.com Help Window
- Buttons:** Edit, Delete

Screenshot 2: Payment1

- Left sidebar:** Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types.
- Details panel:**
 - Description: [empty]
 - API Name: Payment1__c
 - Custom: ✓
 - Singular Label: Payment1
 - Plural Label: Payment1s
 - Enable Reports: ✓
 - Track Activities: ✓
 - Track Field History: ✓
 - Deployment Status: Deployed
 - Help Settings: Standard salesforce.com Help Window
- Buttons:** Edit, Delete

Task 3: Tabs

Step1: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

The screenshot shows the Salesforce Setup interface with the 'Tabs' page open. The left sidebar includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'Feature Settings', 'Analytics', 'Tableau Embedding', and 'User Interface' sections are visible. The 'Tableau' section is expanded, showing 'Tableau Embedding' and 'Tableau Limit'. The 'Tabs' section is also expanded, showing 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs'. A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Edit Custom Object Tab Total Rooms'. It contains fields for 'Tab Label' (Total Rooms), 'Object' (Total Room), and 'Tab Style' (Keys). An optional 'Splash Page Custom Link' dropdown is set to 'None'. A 'Description' text area is empty. At the bottom are 'Save' and 'Cancel' buttons.

Step2:Create tabs for all other custom objects by selecting there own objects as above step1.

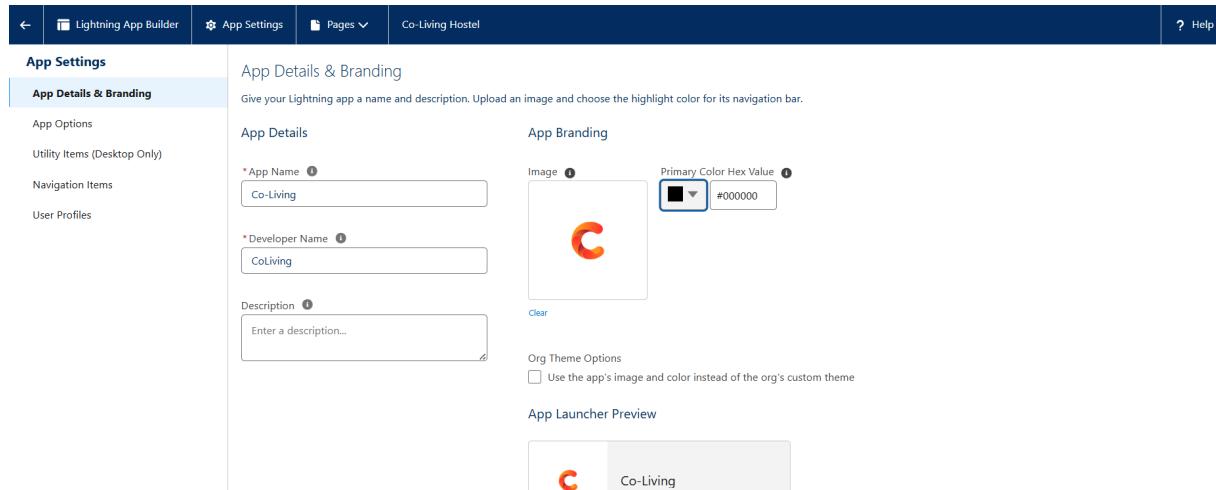
The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The left sidebar includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'Feature Settings', 'Analytics', 'Tableau Embedding', and 'User Interface' sections are visible. The 'Tableau' section is expanded, showing 'Tableau Embedding' and 'Tableau Limit'. The 'Tabs' section is also expanded, showing 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs'. A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs'. It contains a note: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below this is a table titled 'Custom Object Tabs' with columns for 'Action', 'Label', 'Tab Style', and 'Description'. The table lists several tabs: 'Customers' (Cup), 'Feedbacks' (Presenter), 'Food Selections' (Circle), 'Payments' (Square), 'Room Bookings' (Sale), and 'Total Rooms' (Keys). Each row has 'Edit | Del' links. At the top of the table is a 'New' button and a 'What Is This?' link.

Task4:The Lightning App

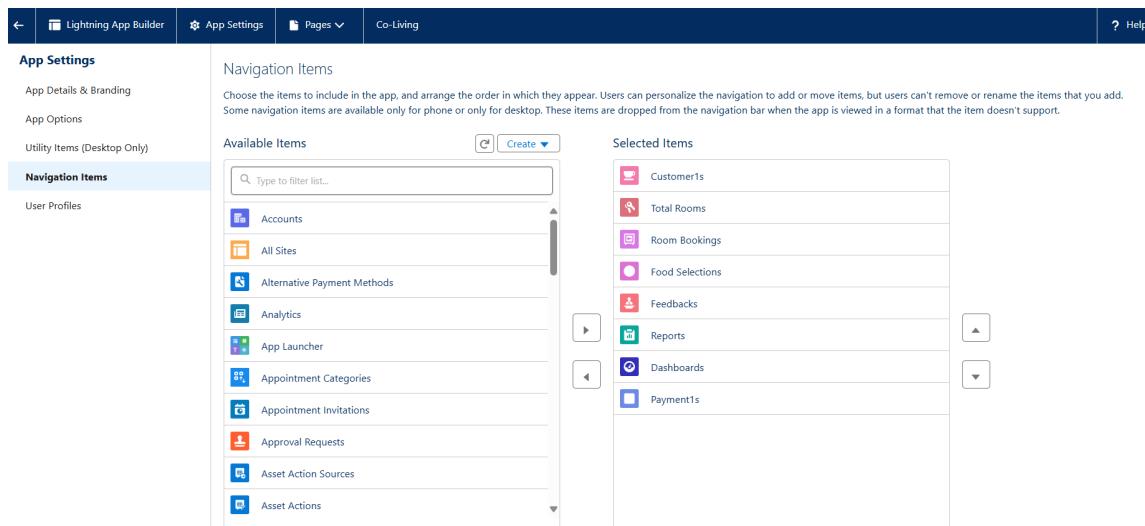
Step1:Create a Lightning App

To create a lightning app page:

1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.



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



4. To Add User Profiles:

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

The screenshot shows the 'User Profiles' section of the App Settings. On the left, there's a sidebar with options like 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The 'User Profiles' option is selected and highlighted in blue. The main area is titled 'User Profiles' and contains a sub-section 'Available Profiles'. It lists various user profile names such as 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', etc. Below this list is a search bar with the placeholder 'Type to filter list...'. To the right of the available profiles is a 'Selected Profiles' section, which currently contains four profiles: 'System Administrator', 'Standard Platform User', 'Customer Platform User1', and 'Custom platform User2'. There are also two small arrows between the two sections, likely for moving profiles between them.

Task5:Fields & Relationships

Step1:Creation of fields for the customer1 object

1. To create fields in an object:
2. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Phone”
4. Click on next
5. Fill the Above as following:
 - Field Label: Phone no
 - Field Name : gets auto generated
 - Click on Next > Next > Save and new.

The screenshot shows the 'Fields & Relationships' page for the 'Customer1' object. At the top, there's a breadcrumb navigation showing 'SETUP > OBJECT MANAGER' and the object name 'Customer1'. The left sidebar has a 'Fields & Relationships' section selected, along with other options like 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', and 'Object Limits'. The main content area is titled 'Fields & Relationships' and shows a table with 8 items, sorted by Field Label. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data in the table is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Status	Current_Status__c	Picklist		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		

6. Create other fields in the same object as Email(Datatype:Email), PermanentAddress(Datatype:Textarea). Follow same as 1 to 5.

7. For current status field:

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

Step2: Creation of fields for the Room Booking object

Field Information	Master-Detail Options
Field Label: Total No Of Rooms Field Name: Total_No_of_Rooms API Name: Total_No_of_Rooms__c Description: Help Text Data Owner: Field Usage Data Sensitivity Level: Compliance Categorization Created By: Geedi.Thejashwni, 28/07/2024, 7:05 pm	Related To: Total_Room Related List Label: Room Bookings Child Relationship Name: Room_Bookings

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
AC-3000	AC_3000__c	Checkbox		
Advance Payment for 1 Month	Advance_Payment_for_1_Month__c	Checkbox		
Amount	Amount__c	Currency(18, 0)		
Check in	Check_in__c	Checkbox		
Check Out	Check_Out__c	Checkbox		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)		

Step3:Creation of fields for payment1 object

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)	✓	
Payment Mode	Payment_Mode__c	Picklist		
Payment No	Name	Auto Number	✓	
Room Booking	Room_Booking__c	Lookup(Room Booking)	✓	

Step4:Creation of fields for food Selection object

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dinner	Dinner__c	Picklist		
Food Selection No	Name	Auto Number	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Lunch	Lunch__c	Picklist		
Name	Name__c	Master-Detail(Customer1)	✓	
Select Breakfast	Select_Breakfast__c	Picklist	Breakfast	
Select Dinner	Select_Dinner__c	Picklist	Dinner	
Select Lunch	Select_Lunch__c	Picklist	Lunch	

Step5:Creation of fields for Feedback object

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback No	Name	Auto Number	✓	
Food	Food__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer1)	✓	
Owner	OwnerId	Lookup(User,Group)	✓	
Roomcleaning	Roomcleaning__c	Picklist		

Step6:Creation of fields for Total Room object

The screenshot shows the Salesforce Object Manager interface for creating fields. The left sidebar lists options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Fields & Relationships' under 'Total Room'. It displays six items, sorted by Field Label. A table shows the following field details:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rooms Available	Rooms_Available__c	Formula (Number)		
Rooms Booked	Rooms_Booked__c	Roll-Up Summary (COUNT Room Booking)		
Total No Of Rooms	Name	Text(80)		✓

Task6:Validation rule

Step1:Creation of 2 validation rules to an Room Booking Object

The screenshot shows the 'Room Booking Validation Rule' detail page. The left sidebar lists options like Details, Fields & Relationships, Page Layouts, etc. The main area shows a single validation rule named 'check_in_rule'.

Rule Name	Check in	Active
Error Condition Formula	Check_in_c = False	✓
Error Message	Check box should be checked	Error Location: Check in
Description		
Created By	Geedi Thejashwi	Modified By: Geedi Thejashwi

The screenshot shows the 'Validation Rules' list page for the Room Booking object. The left sidebar lists options like Details, Fields & Relationships, Page Layouts, etc. The main area shows two validation rules:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
check_in_rule	Check in	Check box should be checked	✓	Geedi Thejashwi, 04/08/2024, 3:41 pm
checkbox_field	Advance Payment for 1 Month	checkbox should be checked	✓	Geedi Thejashwi, 28/07/2024, 8:08 pm

The screenshot shows the 'Room Booking Validation Rule' detail page for the second validation rule, named 'checkbox_field'. The left sidebar lists options like Details, Fields & Relationships, Page Layouts, etc. The main area shows the rule details:

Rule Name	checkbox_field	Active
Error Condition Formula	Advance_Payment_for_1_Month__c = false	✓
Error Message	checkbox should be checked	Error Location: Advance Payment for 1 Month
Description		
Created By	Geedi Thejashwi	Modified By: Geedi Thejashwi

Task7:Profiles

Step1:Custom user Profile

Custom Object Permissions

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Customer1s	✓	□	□	□	□	□	✓	□	□	□	□	□
Feedbacks	✓	□	□	□	□	□	✓	□	□	□	□	□
Food Selections	✓	□	□	□	□	□	✓	□	□	□	□	□
Payment1s	✓	□	□	□	□	□	✓	□	□	□	□	□
Room Bookings	✓	□	□	□	□	□	✓	□	□	□	□	□
Total Rooms	✓	□	□	□	□	□	✓	□	□	□	□	□

Profile Detail

Name	Custom User	Edit		Clone	Delete	View Users
User License	Salesforce					Custom Profile ✓
Description						
Created By	Geedi.Thejashwni	28/07/2024, 9:46 pm			Modified By	Geedi.Thejashwni, 04/08/2024, 3:49 pm

Step2:Custom platform user1

Profile Detail

Name	Customer Platform User1	Edit		Clone	Delete	View Users
User License	Salesforce Platform					Custom Profile ✓
Description						
Created By	Geedi.Thejashwni	28/07/2024, 9:48 pm			Modified By	Geedi.Thejashwni, 28/07/2024, 9:49 pm

Custom Object Permissions

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Customer1s	✓	□	□	□	□	□	✓	□	□	□	□	□
Feedbacks	✓	□	□	□	□	□	✓	□	□	□	□	□
Food Selections	✓	□	□	□	□	□	✓	□	□	□	□	□
Payment1s	✓	□	□	□	□	□	✓	□	□	□	□	□
Room Bookings	✓	□	□	□	□	□	✓	□	□	□	□	□
Total Rooms	✓	□	□	□	□	□	✓	□	□	□	□	□

Step3:Custom platform user2

The screenshot shows the Salesforce Setup - Profiles page. The profile is named "Custom platform User2". It has a "User License" of "Salesforce Platform" and is assigned to a "Custom Profile". The "Profile Detail" section includes buttons for Edit, Clone, Delete, and View Users. A note states: "Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information." Below this, a list of permissions is shown, including "Login IP Ranges", "Enabled Apex Class Access", "Enabled Visualforce Page Access", "Enabled External Data Source Access", "Enabled Named Credential Access", "Enabled External Credential Principal Access", "Enabled Custom Metadata Type Access", "Enabled Custom Setting Definitions Access", "Enabled Flow Access", "Enabled Service Presence Status Access", and "Enabled Custom Permissions".

The screenshot shows the "Custom Object Permissions" section for the "Custom platform User2" profile. It lists several custom objects: Customer1s, Feedbacks, Food Selections, Payments, Room Bookings, and Total Rooms. For each object, there are two tables: "Basic Access" and "Data Administration". The "Basic Access" table includes columns for Read, Create, Edit, Delete, View All, and Modify All. The "Data Administration" table includes columns for Read, Create, Edit, Delete, View All, and Modify All.

Object	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Customer1s	✓	✓	✓	✓	□	□	Payments	✓	✓	✓	✓	□
Feedbacks	✓	✓	✓	✓	□	□	Room Bookings	✓	✓	✓	✓	□
Food Selections	✓	✓	✓	✓	□	□	Total Rooms	✓	□	□	□	□

Task8:Roles

Step1:Adding Marketing Role and Receptionist Role

The screenshot shows the "Your Organization's Role Hierarchy" page. The hierarchy starts with "mallareddy university", which contains the following roles:

- CEO**: Edit | Del | Assign
- CFO**: Edit | Del | Assign
- COO**: Edit | Del | Assign
- Marketing**: Edit | Del | Assign
- Receptionist**: Edit | Del | Assign
- SVP, Customer Service & Support**: Edit | Del | Assign
 - Customer Support, International**: Edit | Del | Assign
 - Customer Support, North America**: Edit | Del | Assign
 - Installation & Repair Services**: Edit | Del | Assign
- SVP, Human Resources**: Edit | Del | Assign

Task9:Users

Step1: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

User Edit
sandeep gujja

User Edit
Save Save & New Cancel

General Information

First Name	sandeep
Last Name	gujja
Alias	sgujj
Email	geedithejashwini07@gmail.com
Username	sandeep@gujja98.com
Nickname	User172218380245997932
Title	
Company	
Department	
Division	

Role	CEO
User License	Salesforce
Profile	Custom User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>

Step2:Create another User

User Edit
Ganesh gelli

User Edit
Save Save & New Cancel

General Information

First Name	Ganesh
Last Name	gelli
Alias	ggelli
Email	geedithejashwini07@gmail.com
Username	gelli@ganesh43.com
Nickname	User172218407270396132
Title	
Company	
Department	
Division	

Role	Receptionist
User License	Salesforce Platform
Profile	Custom platform User2
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>

Step3:Create another User

The screenshot shows the 'User Edit' page for 'Abhilash garapati'. The 'General Information' section contains the following details:

Field	Value
First Name	Abhilash
Last Name	garapati
Alias	agara
Email	geedithejashwini07@gmail.com
Username	garapati@abhi.com
Nickname	User172218395804262829
Title	(empty)
Company	(empty)
Department	(empty)

On the right side, under 'Role', 'Marketing' is selected. Under 'User License', 'Salesforce Platform' is selected. Under 'Profile', 'Customer Platform User1' is selected. The 'Active' checkbox is checked. Other checkboxes for Marketing User, Offline User, Knowledge User, Flow User, and Service Cloud User are all unchecked.

Task10:User Adoption

Step1:Create a Records (Customers)

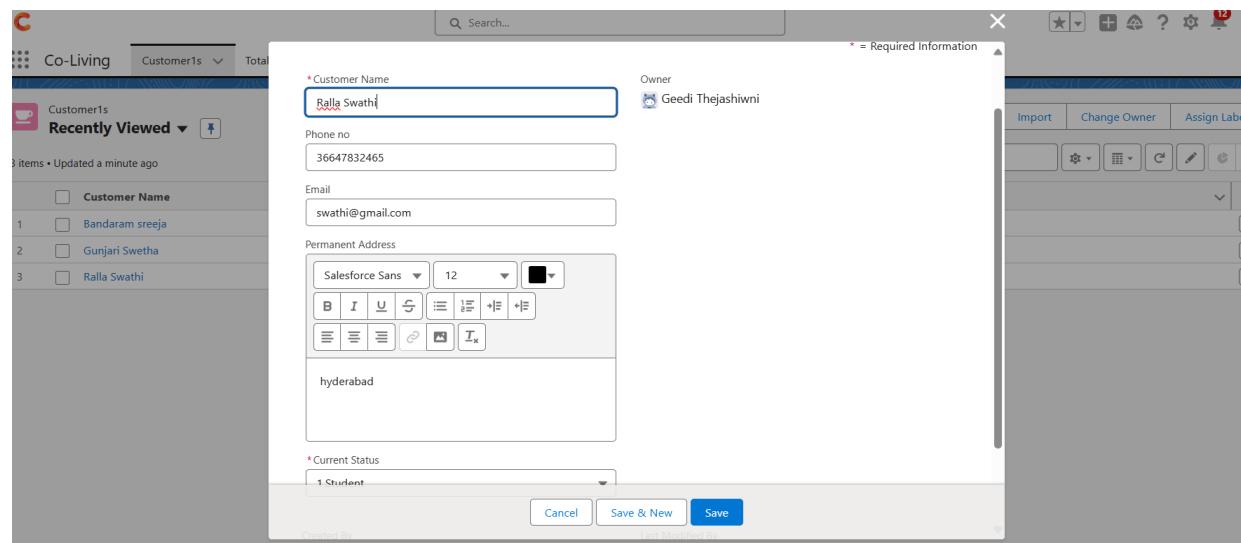
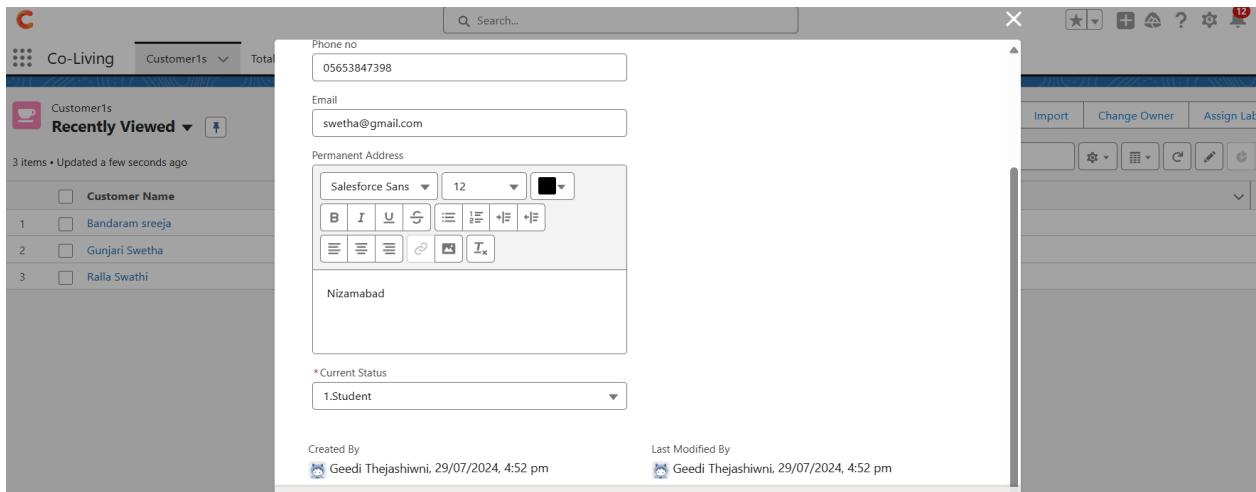
- 1.Click on App Launcher on the left side of the screen.
- 2.Search Co-Living & click on it
- 3.Click on the Customers Tab.
- 4.Click new and fill details & Save

The screenshot shows the Salesforce App Launcher. The 'Co-Living' app is highlighted with a red arrow. Other visible apps include Community, Content, Sales Console, Service Console, and Einstein Bots.

The main screen displays three cards:

- Get Started with Einstein Bots**: Launch an AI-powered bot to automate your digital connections. [Get Started](#)
- Mobile Publisher**: Use the Mobile Publisher to create your own branded mobile app. [Learn More](#)
- Real-time Collaborative Docs**: Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. [Get Started](#)

The screenshot shows the 'Customer' record creation page. The 'Customer Name' field is populated with 'Bandaram sreeja'. Other fields include 'Phone no' (74542388798), 'Email' (sreeja@gmail.com), 'Permanent Address' (with a rich text editor containing 'Siddipet'), and 'Current Status' (1.Student). The 'Owner' field is set to 'Geedi Thejashwi'. The bottom status bar indicates the record was created by 'Geedi Thejashwi' on '29/07/2024, 4:52 pm'.



Task11:Reports

Step1:Create a 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 “Customer1s with Room Bookings and Total Rooms ” > click on start report.

4.Customize your report

5.Add fields from left pane as shown below

Total Records	Total Advance Payment for 1 Month	Total AC-3000	Total Amount
5	5	5	₹45,000
Customer1: Customer Name ↑			
<input type="checkbox"/> Bandaram sreeja (2)	RN-003	2	sreeja@gmail.com 74542388798 1.Student Siddipet <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
	RN-005	2	sreeja@gmail.com 74542388798 1.Student Siddipet <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Subtotal			
<input type="checkbox"/> Gunjari Swetha (2)	RN-001	5	swetha@gmail.com 05653847398 1.Student Nizamabad <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
	RN-004	5	swetha@gmail.com 05653847398 1.Student Nizamabad <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Subtotal			
<input type="checkbox"/> Ralla Swathi (1)	RN-002	2	swathi@gmail.com 36647832465 1.Student hyderabad <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Subtotal			
Total (5)			

Step2: Create another Report

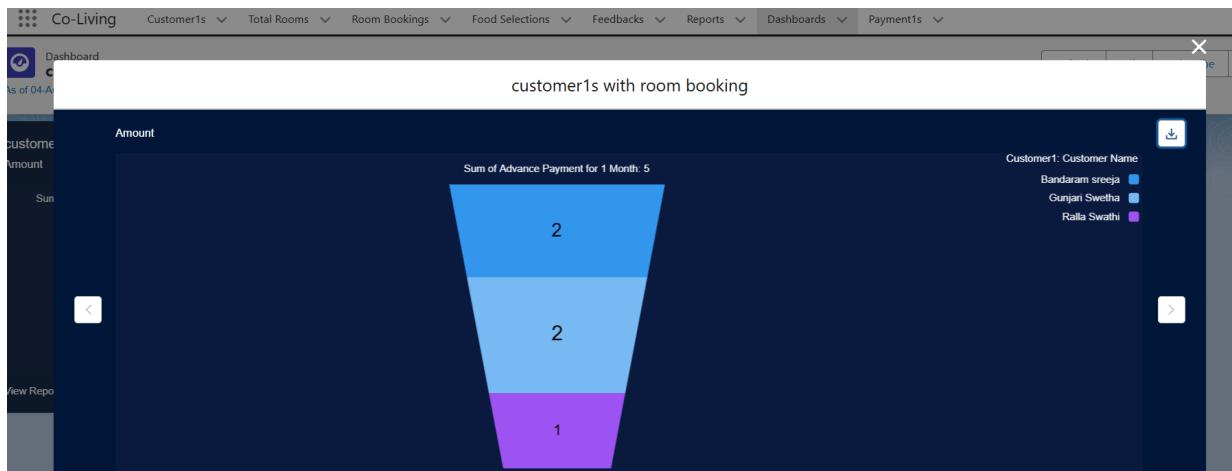
1. Go to the app > click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel “customer1s with Room booking with Payments” > click on start report.
4. Customize your report
5. Add fields from left pane as shown below

Total Records	Total Room Booking: AC-3000	Total Room Booking: Advance Pay...	Total Amount	Total Room Booking: Check Out	Total Room Booking: Check in	Total Room Booking: Rooms Avail...
3	3	3	₹11,000.00	2	3	82.00
Customer1: Customer Name ↑						
<input type="checkbox"/> Bandaram sreeja (1)	PNO-003	RN-003	7.Gpay <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>			₹4,000.00 <input type="checkbox"/>
				1	1	₹4,000.00 0
<input type="checkbox"/> Gunjari Swetha (1)	PNO-001	RN-001	6.Phonepe <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>			₹5,000.00 <input checked="" type="checkbox"/>
				1	1	₹5,000.00 1
<input type="checkbox"/> Ralla Swathi (1)	PNO-002	RN-002	1.Cash <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>			₹2,000.00 <input checked="" type="checkbox"/>
				1	1	₹2,000.00 1
Total (3)				3	3	₹11,000.00 2

Task12:Dashboards

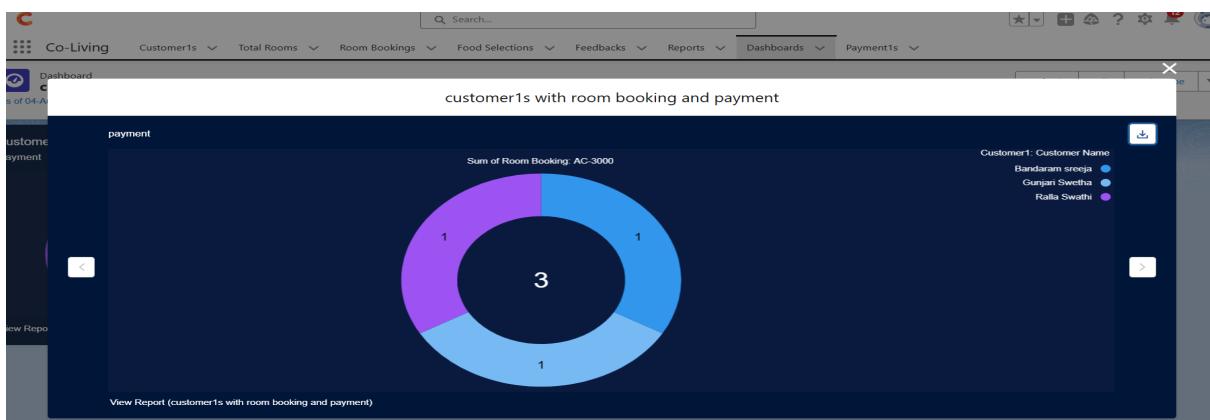
Step1:Create a Dashboard

- 1.Go to the app > click on the Dashboard tabs and click on new Dashboard
- 2.Give a Name as custom Dashboard and click on Create. 3.Select add component.
- 4.Select a Report Customer1s with Room Booking and click on select.
- 5.Click Add then click on Save and then click on Done.



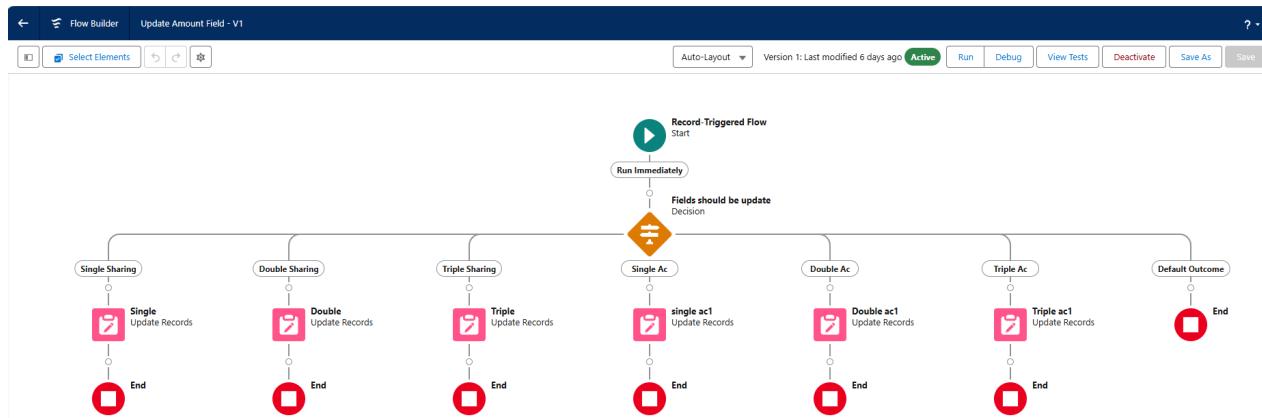
Step2:Create another Dashboard

- 1.Go to the app > click on the Dashboard tabs and click on new Dashboard
- 2.Give a Name as custom Dashboard1 and click on Create.
- 3.Select add component.
- 4.Select a Report Customer1s with Room Bookings and Payment and click on select.
- 5.Click Add then click on Save and then click on Done.



Task13:Flows

Step1:Create a Flow



Step2:Test the flow

- ☆ In the Co-living app click on the Room Booking tab and click on new
- ☆ Enter the details like Name, Room sharing, AC-3000, Advance payment for 1 Month. And the Amount field is empty before saving the record.

Room No

Total

*Room Sharing
2.Double sharing

*Name
Bandaram sreeja

AC-3000

Advance Payment for 1 Month

Amount

Total No Of Rooms
5

Check in

Check Out

The screenshot shows a software interface for managing room bookings. At the top, there's a navigation bar with a logo, a search bar, and links for 'Customer1s', 'Total Rooms', 'Room Bookings', 'Food Selections', 'Feedbacks', 'Reports', and 'Dashboards'. Below the navigation is a header for 'Room Booking RN-006'. The main area has tabs for 'Related' and 'Details', with 'Details' being the active tab. The form fields include:

- Room No: RN-006
- Room Sharing: 2.Double sharing
- Name: Bandaram sreeja
- AC-3000
- Advance Payment for 1 Month: ₹30,000
- Total No Of Rooms: 5
- Rooms Available: 27.00
- Check in:

THANK YOU