A CRM Application to Manage the Booking of Co-Living

By

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Project Abstract

The Co-Living Space CRM application is designed to support the management and operation of a modern co-living community. Our co-living project seeks to create a dynamic, inclusive environment where residents can live, work, and connect with others who share similar values and interests. The core objective is to foster collaboration, reduce isolation, and enhance the overall quality of life by providing a balanced mix of private and communal spaces.

The CRM system plays a crucial role in managing the daily operations and interactions within the co-living space. It allows for the efficient storage and retrieval of customer details, enabling residents to choose from various air-conditioned rooms with multiple sharing options tailored to their preferences. The application also facilitates the selection of special food items on a daily basis, catering to individual dietary needs and preferences.

To streamline the financial aspects of the community, the CRM system supports multiple payment modes, ensuring a seamless and user-friendly transaction process. Additionally, the application includes a feedback mechanism where residents can provide insights and opinions on various services such as room cleanliness, internet connectivity, and food quality. This feedback loop is essential for maintaining high service standards and continuously improving the living experience.

Overall, the Co-Living Space CRM application is a comprehensive tool that enhances the management of co-living environments, ensuring that the community remains vibrant, well-organized, and responsive to the needs of its residents.

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INTRODUCTION

The concept of co-living has gained significant popularity in recent years as urbanization, housing shortages, and evolving lifestyle preferences have driven individuals to seek alternative living arrangements. Co-living spaces are designed to provide a shared living environment that fosters community, collaboration, and social interaction, while still offering personal privacy. These spaces cater to a diverse range of residents, including young professionals, digital nomads, and creative individuals, all of whom seek a sense of belonging and convenience in their living arrangements.

To effectively manage and optimize the operations of such a dynamic living environment, a robust Customer Relationship Management (CRM) system is essential. The Co-Living Space CRM application is developed to address the unique needs of managing a co-living community. It is more than just a management tool; it is a platform that enhances the living experience by streamlining various aspects of daily life within the community.

The CRM application serves as the backbone of the co-living space, facilitating the management of resident information, room bookings, and service requests. Residents can use the application to choose from different types of air-conditioned rooms with varying levels of sharing. The system ensures that each resident's preferences and needs are met, from room selection to dietary requirements, by offering the ability to select special food items on a daily basis.

Additionally, the application supports multiple payment methods, making the financial aspect of living in a co-living space hassle-free. A key feature of the CRM system is the feedback mechanism, which allows residents to provide real-time feedback on services such as room cleanliness, internet connectivity, and food

quality. This feedback is crucial for maintaining high standards of service and ensuring that the community remains responsive to the needs of its residents.

In summary, the Co-Living Space CRM application is an integral part of creating and

sustaining a vibrant co-living community. It empowers both residents and management by providing the tools needed to manage daily operations efficiently, thereby enhancing the overall living experience.

Task 1:Salesforce

Introduction to Salesforce

Are you new to Salesforce and unsure where to begin? If so, you're in the right place. This module is designed to help you get started with Salesforce, a powerful technology that boosts productivity and helps you sell smarter and faster. As you progress through this module, you'll explore Salesforce's key features and learn what makes it a game-changer for businesses.

What Is Salesforce?

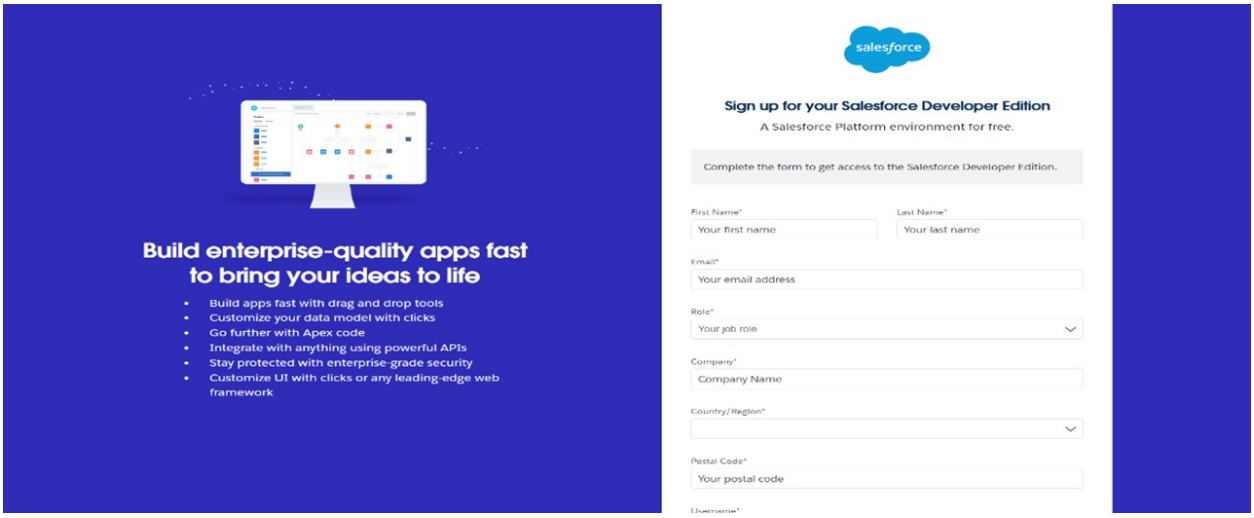
Salesforce is a comprehensive customer success platform that helps you manage sales, service, marketing, analytics, and customer connections. It provides everything you need to run your business from anywhere. With Salesforce, you can manage relationships, collaborate with employees and partners, and securely store your data in the cloud.In the past, your contacts, emails, tasks, and deals might have been scattered across various tools and systems. Salesforce consolidates all these elements into one platform, making it easier to stay organized and focused on your business goals.

For a quick overview, check out this video: What Is Salesforce?.

Activity 1 : Creating Developer Account

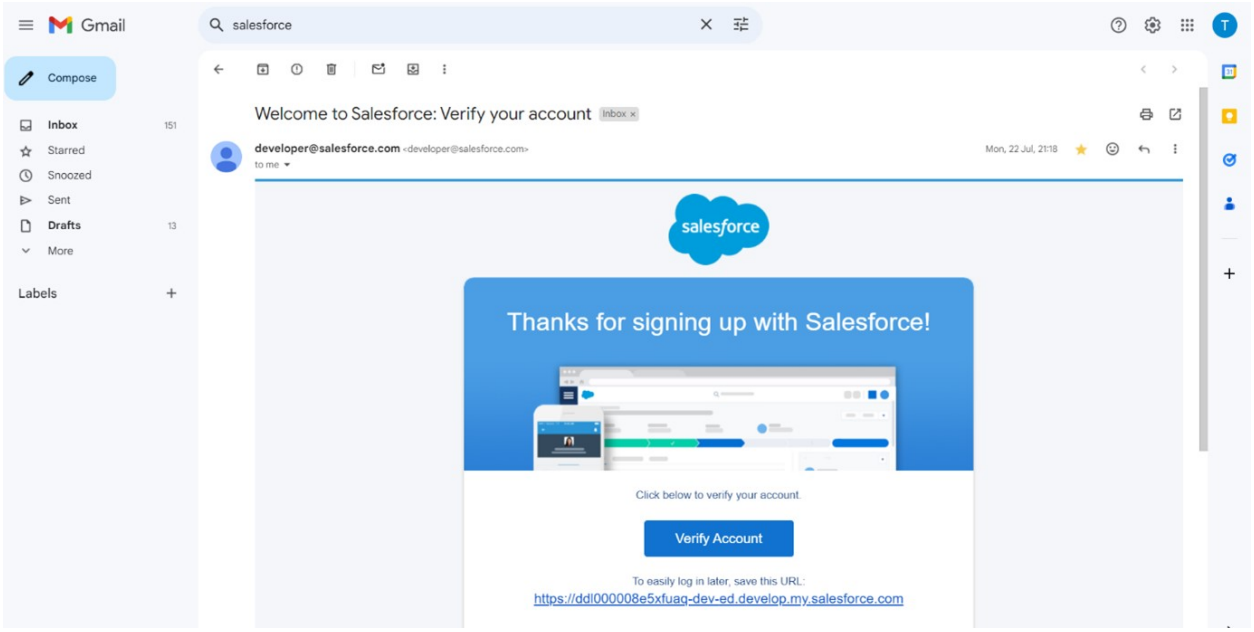
To create a Salesforce Developer Org, start by visiting https://developer.salesforce.com/signup. On the sign-up form, you'll need to provide several details. Begin by entering your first and last name, followed by your email address. For the role, select "Developer." Next, fill in your company name, which can be the name of your college if you're a student. Choose "India" as your country, and enter your postal code. For the username, create a unique

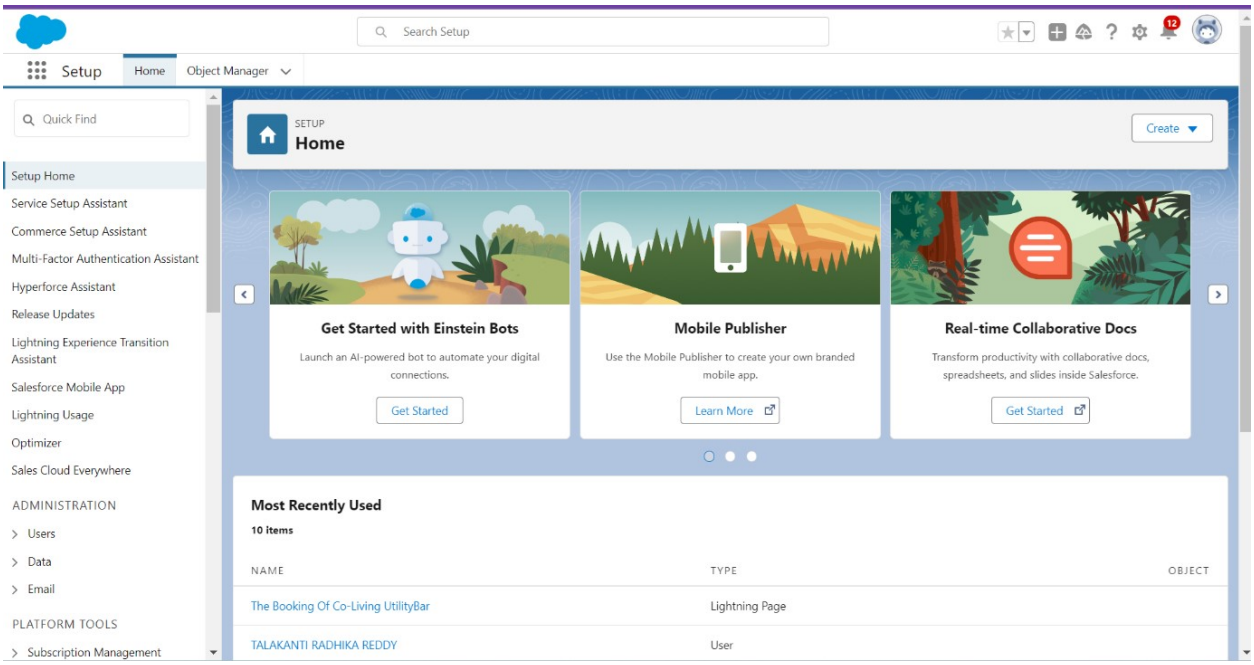
combination of your name and company; this doesn't have to be a real email address but should follow the format username@organization.com. Once all the fields are completed, click "Sign Me Up" to finish the process. You'll receive a confirmation email shortly, which will guide you to set up your Developer Org and start exploring Salesforce.



Activity 2 : Account Activation

After signing up for your Salesforce Developer Org, head to the inbox of the email address you provided during registration. Look for an email from Salesforce, which may take 5-10 minutes to arrive. Once you receive it, open the email and click on the "Verify Account" link to activate your account. This will direct you to a page where you'll be prompted to create a password and select a security question. After setting your password and answering the security question, click "Change Password" to finalize the setup. You will then be redirected to your Salesforce setup page, where you can begin exploring and configuring your new Developer Org.





Task 2 : Object

In Salesforce, objects function as database tables that store data specific to an organization. They are critical for managing and organizing information effectively. Salesforce objects are classified into two main types:

1. **Standard Objects:** These are pre-defined by Salesforce and include essential

features such as Users, Contracts, Reports, and Dashboards. Standard objects come with built-in fields and functionalities suited for common business needs.

2. **Custom Objects:** These are created by users to meet unique requirements specific to their organization. Custom objects allow you to capture and manage data that isn't covered by standard objects. They are central to tailoring Salesforce applications to fit particular needs and ensure efficient data sharing and management.

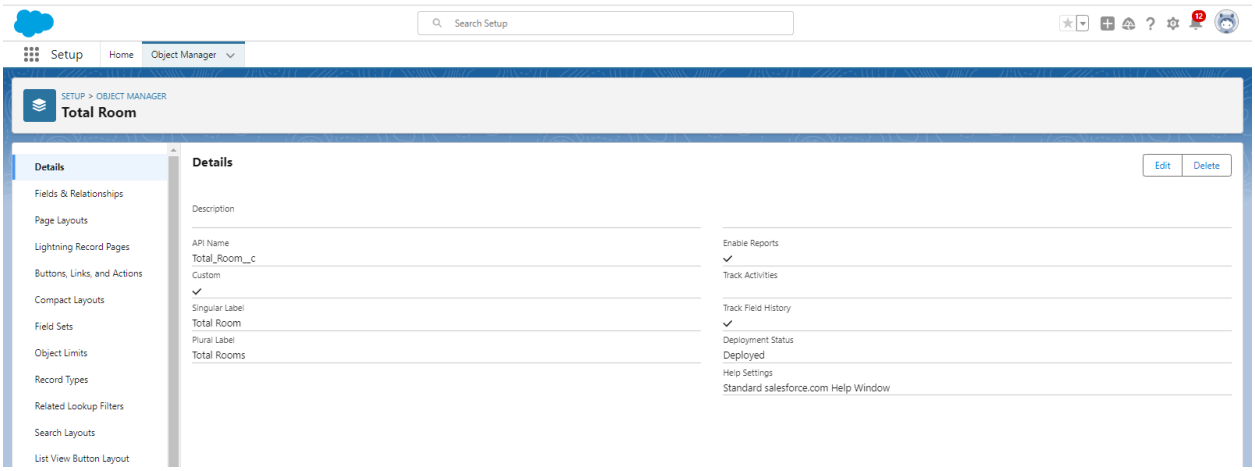
To navigate to the Setup page in Salesforce, click on the gear icon in the upper right corner of the interface and select "Setup."

In the context of a co-living space application, you would use both standard and custom objects to manage various aspects of your operations. For instance, standard objects like Users can be utilized to manage profiles of residents and staff, while Accounts can be used to track different co-living spaces or associated partners. Custom objects, on the other hand, can be designed to handle specific requirements such as Room Bookings, Meal Preferences, and Service Feedback. These custom objects would include tailored fields such as room types, booking dates, dietary needs, and service ratings, providing a structured approach to manage and share data effectively within the co-living environment.

Activity 1 : Create a custom object for Total Rooms

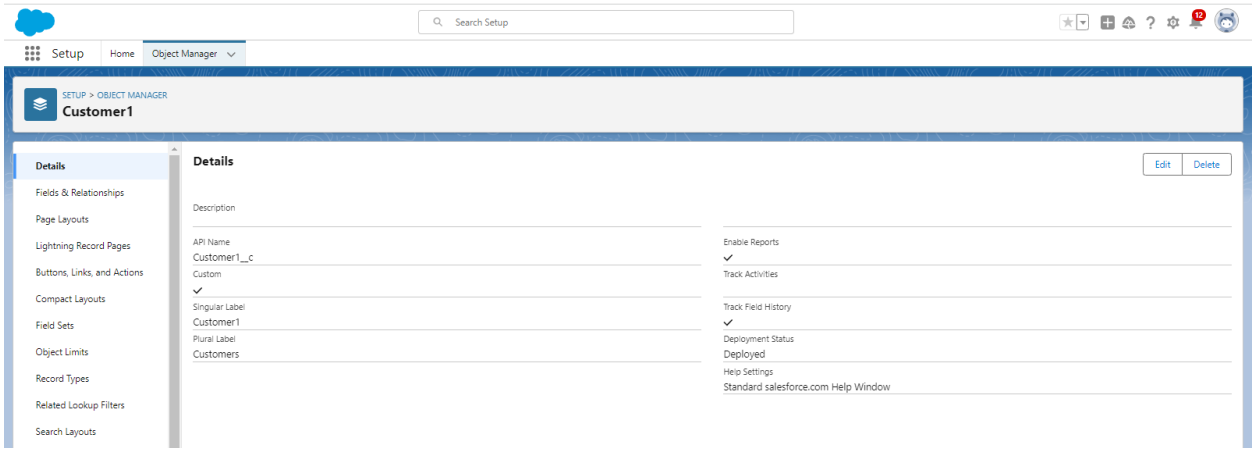
To create a custom object named "Total Rooms" in Salesforce, first navigate to Setup, click on "Object Manager," then select "Create" and choose "Custom Object." In the setup form, enter "Total Room" as the label and "Total Rooms" as the plural label. For the Record Name, use "Total No Of Rooms" with the data type set to "Text." Enable the options for "Allow Reports" and "Track Field History" in the Optional Features section. Ensure that "Deployed" is selected in the Deployment Status section and choose "Allow Search" in the Search Status section. Additionally, select "Add Notes and Attachments related list to default page layout" under Object Creation Options. Finally, click "Save" to complete the creation of your custom

object.



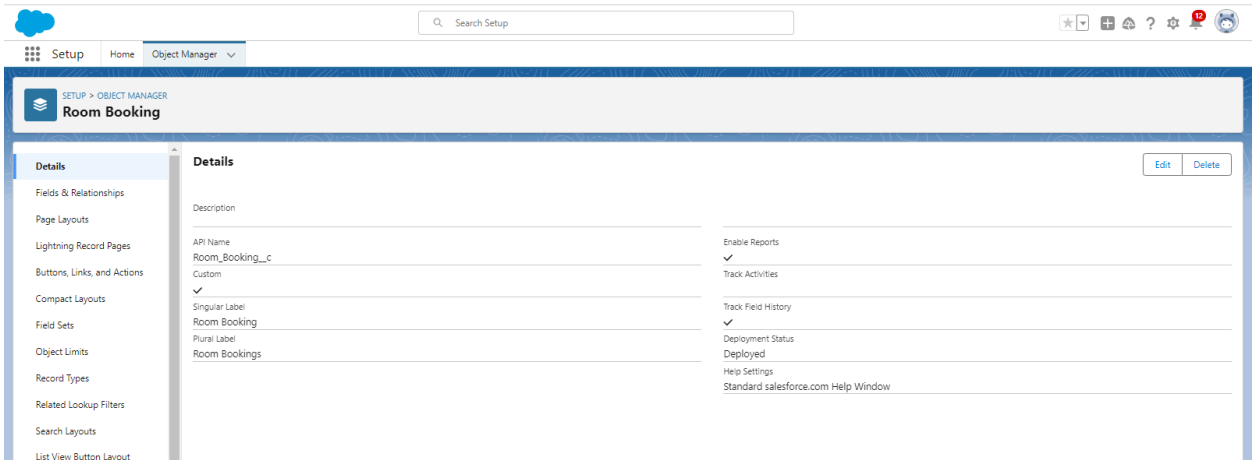
Activity 2 : Create a custom object for Customer

To create a custom object, go to Setup, click on "Object Manager," then select "Create" and choose "Custom Object." Enter "Customer1" as the label and "Customers" as the plural label. Set the Record Name to "Customer Name" with the data type "Text." Enable "Allow Reports" and "Track Field History" in the Optional Features section. Ensure "Deployed" is selected in the Deployment Status section and choose "Allow Search" in the Search Status section. In the Object Creation Options section, select "Add Notes and Attachments related list to default page layout." Finally, click "Save" to complete the process.



Activity 3 : Create a custom object for Room Booking

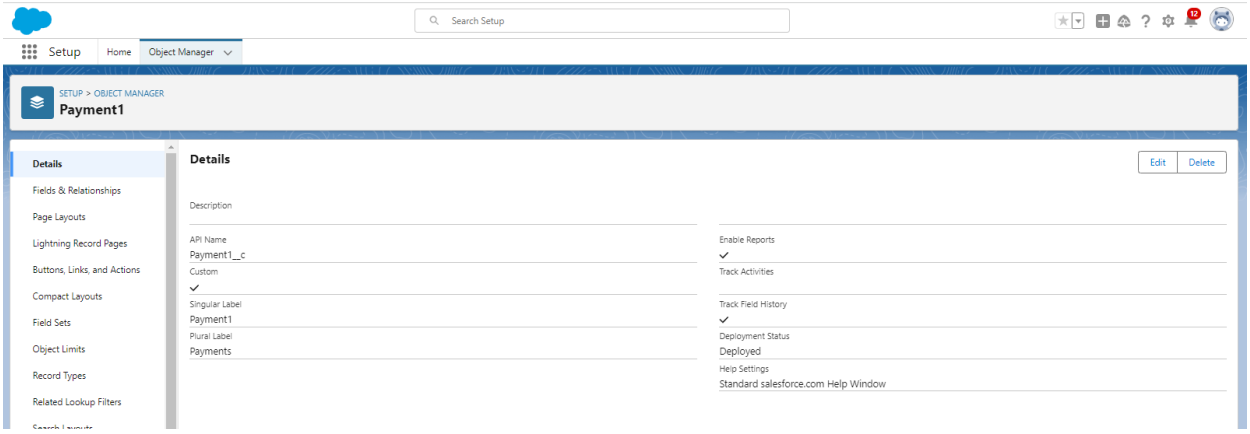
To create a custom object, go to Setup and click on "Object Manager," then select "Create" and choose "Custom Object." Enter "Room Booking" as the label and "Room Bookings" as the plural label. Set the Record Name to "Room No" with the data type "Auto Number." Under Display Format, enter "RN-{000}" and set the Starting Number to 1. In the Optional Features section, select "Allow Reports" and "Track Field History." Ensure "Deployed" is selected in the Deployment Status section and choose "Allow Search" in the Search Status section. In the Object Creation Options, select "Add Notes and Attachments related list to default page layout." Click "Save" to complete the setup.



Activity 4 : Create a custom object for Payment

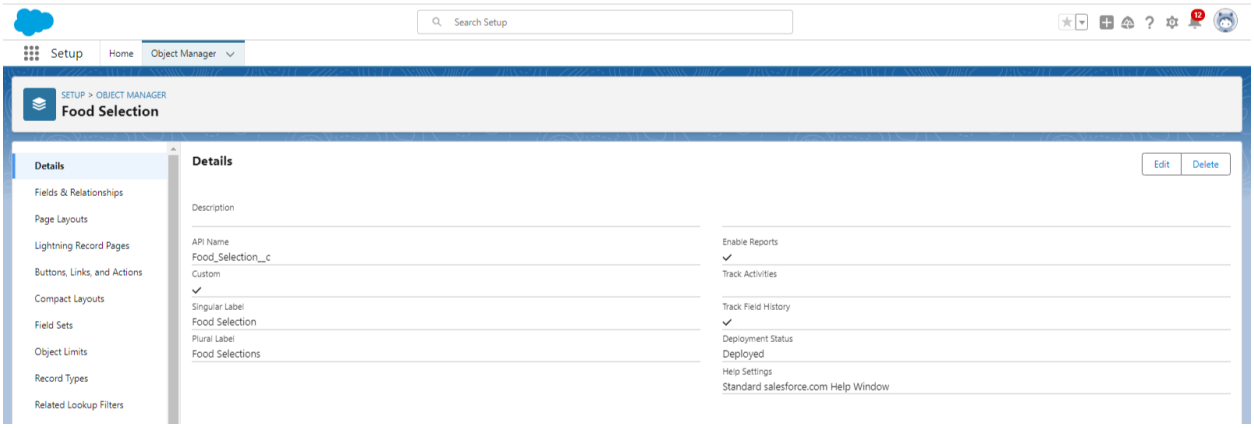
To create a custom object, go to Setup, click on "Object Manager," then select "Create" and choose "Custom Object." Enter "Payment1" as the label and "Payments" as the plural label. Set the Record Name to "Payment No" with the data type "Auto Number." For the Display Format, use "PNO-{000}" and set the Starting Number to 1. In the Optional Features section, select "Allow Reports" and "Track Field History." Ensure "Deployed" is selected in the Deployment Status section and choose "Allow Search" in the Search Status section. In the Object Creation Options section, select "Add Notes and Attachments related list to default page layout." Click

"Save" to finalize the creation.



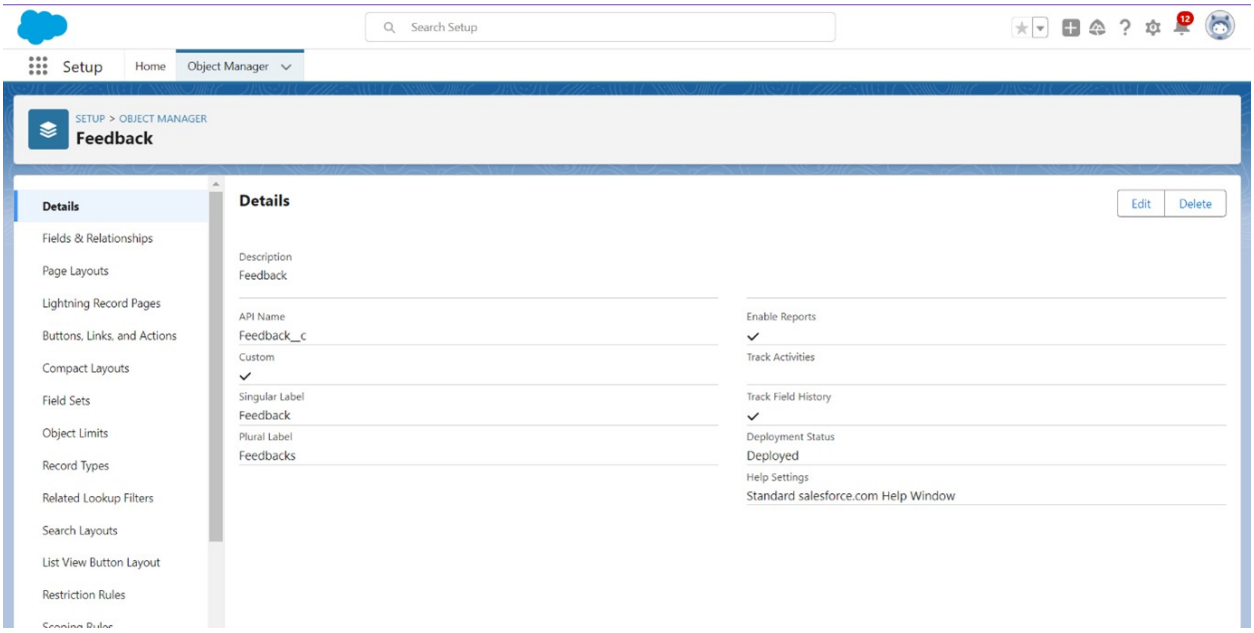
Activity 5 : Create a custom object for Food Selection

To create a custom object, go to Setup, click on "Object Manager," then select "Create" and choose "Custom Object." Enter "Food Selection" as the label and "Food Selections" as the plural label. Set the Record Name to "Food Selection No" with the data type "Auto Number." For the Display Format, use "FS No-{000}" and set the Starting Number to 1. In the Optional Features section, select "Allow Reports" and "Track Field History." Ensure "Deployed" is selected in the Deployment Status section and choose "Allow Search" in the Search Status section. In the Object Creation Options section, select "Add Notes and Attachments related list to default page layout." Click "Save" to complete the setup.



Activity 6 : Create a custom object for Feedback

To create a custom object, go to Setup, click on "Object Manager," then select "Create" and choose "Custom Object." Enter "Feedback" as the label and "Feedbacks" as the plural label. Set the Record Name to "Feedback No" with the data type "Auto Number." For the Display Format, use "Fd No-{0000}" and set the Starting Number to 1. In the Optional Features section, select "Allow Reports" and "Track Field History." Ensure "Deployed" is selected in the Deployment Status section and choose "Allow Search" in the Search Status section. In the Object Creation Options section, select "Add Notes and Attachments related list to default page layout." Click "Save" to finalize the creation.



Task 3 : Tab

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

Types of Tabs:

1. **Custom Tabs**

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

2. **Web Tabs**

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

3. **Visualforce Tabs**

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

4. **Lightning Component Tabs**

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

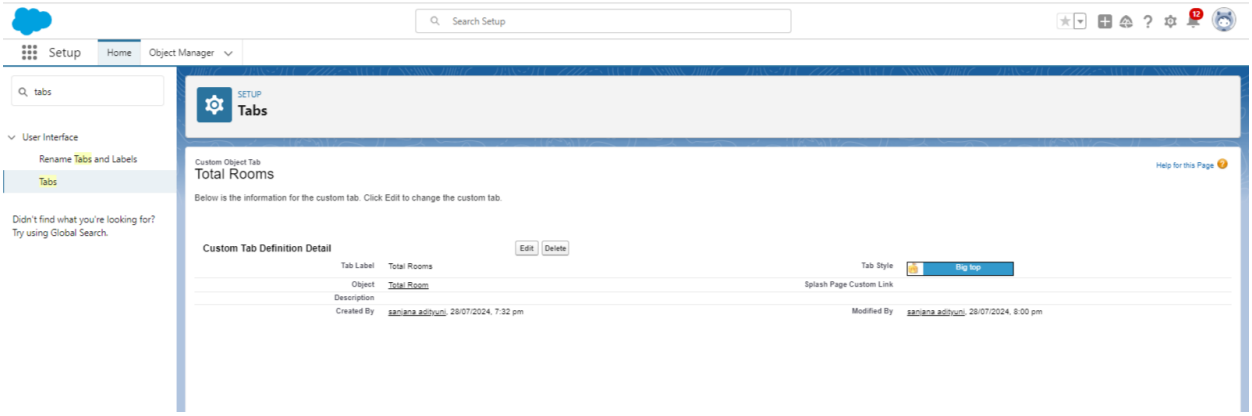
5. **Lightning Page Tabs**

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

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

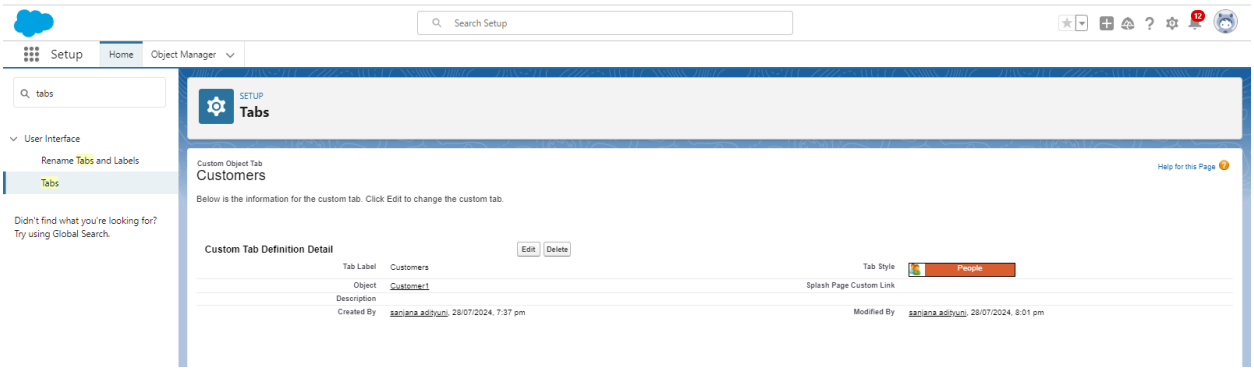
Activity 1 : Creating a Tab for Total Rooms

To create a Tab for "Total Rooms," go to the Setup page, type "Tabs" in the Quick Find bar, and click on "Tabs." Under Custom Object Tabs, click "New." Select the "Total Rooms" object and choose a Tab Style. Click "Next" to proceed through the Add to Profiles page, keeping it as default. Click "Next" again for the Add to Custom App section, keeping it as default, then click "Save" to complete the process.



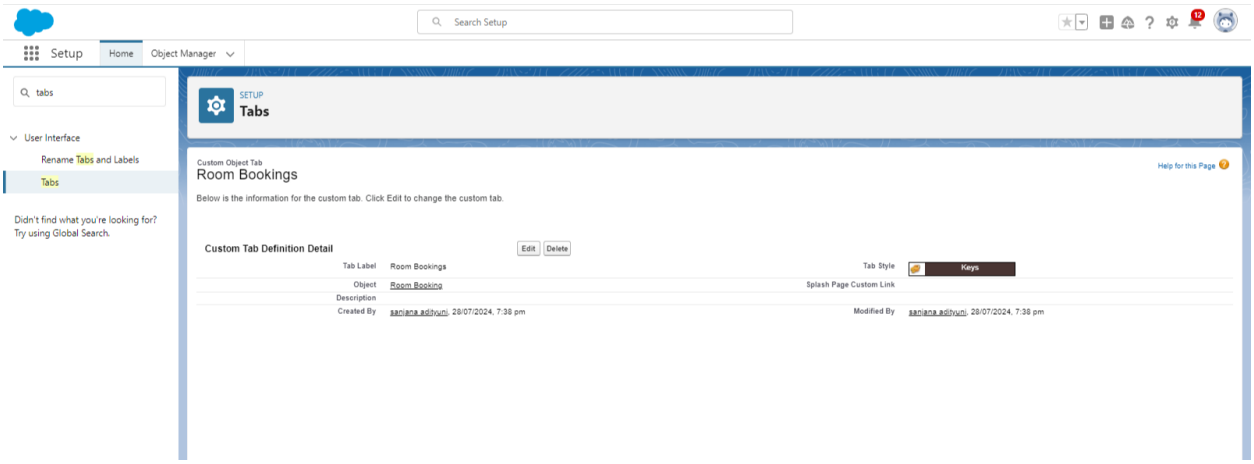
Activity 2 : Create a Tab for Customers

To create a Tab for "Customers," go to the Setup page, type "Tabs" in the Quick Find bar, and click on "Tabs." Under Custom Object Tabs, click "New." Select the "Customers" object and choose a Tab Style. Click "Next" on the Add to Profiles page, keeping it as default. Click "Next" on the Add to Custom App section, also keeping it as default, then click "Save" to complete the process.



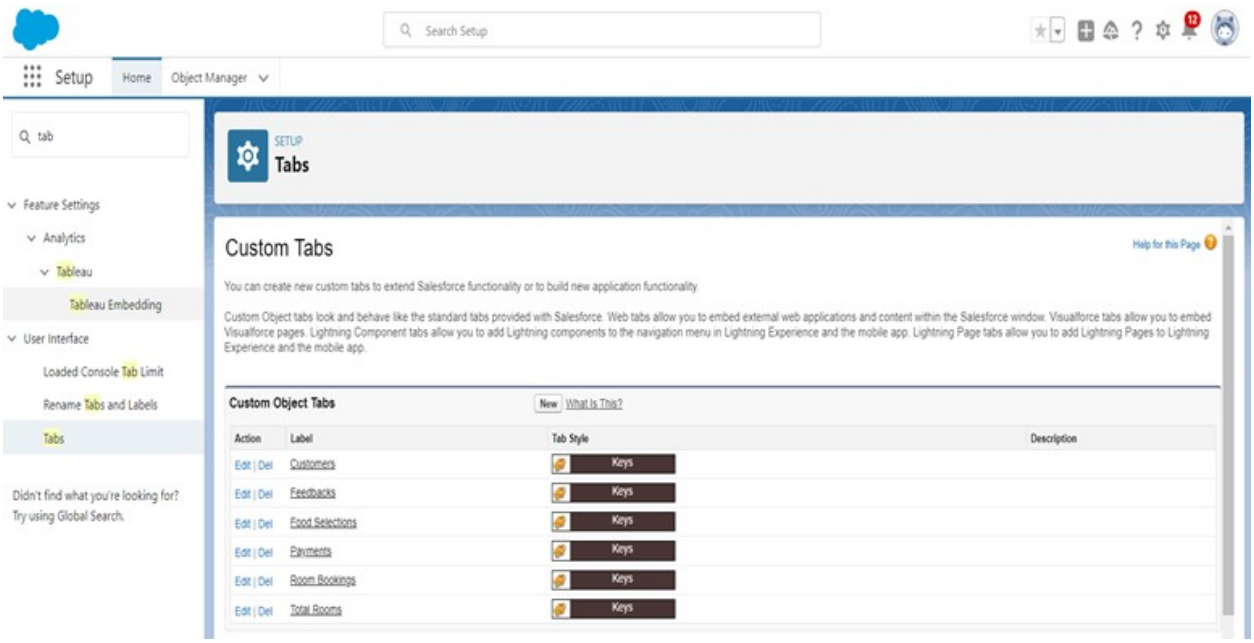
Activity 3 : To create a Tab for Room Bookings

To create a Tab for "Room Bookings," go to the Setup page, type "Tabs" in the Quick Find bar, and click on "Tabs." Under Custom Object Tabs, click "New." Select the "Room Bookings" object and choose a Tab Style. Click "Next" to proceed through the Add to Profiles page, keeping it as default. Click "Next" again for the Add to Custom App section, keeping it as default, then click "Save" to finish.



Activity 4 : Create a Tabs For Remaining Objects

To create Tabs for the "Payments," "Food Selections," and "Feedbacks" objects, go to the Setup page, type "Tabs" in the Quick Find bar, and click on "Tabs." Under Custom Object Tabs, click "New." Select each object (Payments, Food Selections, and Feedbacks) one by one, choose a Tab Style, and click "Next" through the Add to Profiles and Add to Custom App sections, keeping them as default. Finally, click "Save" for each object to complete the process.

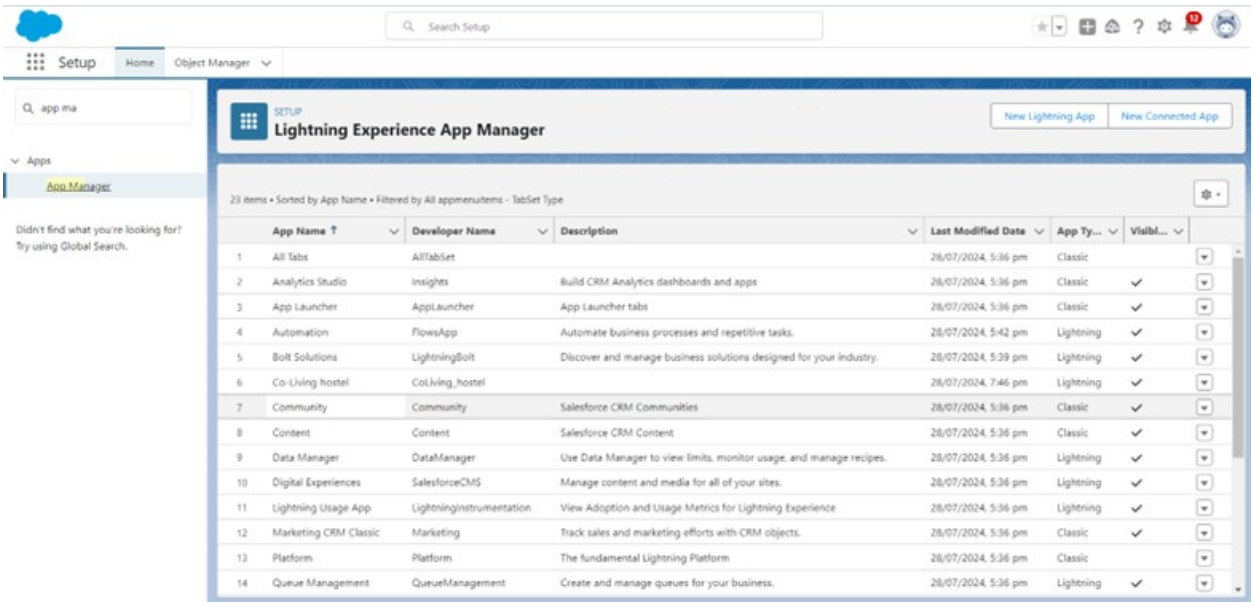


Task 4 : The Lightning App

An app in Salesforce is a collection of items like objects, tabs, and other tools that work together for a specific function. In Lightning Experience, Lightning apps allow users to access these items conveniently through the navigation bar. You can customize your app by adding a custom color, logo, utility bar, and Lightning page tabs. This helps your organization's members work more efficiently by easily switching between apps tailored to different business needs.

Activity 1 : Create a Lightning App

To create a Lightning app page, go to the Setup page, search for "App Manager" in the Quick Find bar, and select "App Manager." Click "New Lightning App" and fill in the app name under "App Details and Branding." Click "Next" through the App Options and Utility Items sections, keeping the defaults. For Navigation Items, select and add the items (Total Rooms, Customers1, Room Booking, Payments1, Food Selection, Feedbacks, Reports, and Dashboards) using the arrow button. For User Profiles, search for "System Administrator," add it, then click "Save & Finish" to complete the process.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1 All Tabs AllTabSet 28/07/2024, 5:36 pm Classic
2 Analytics Studio insights Build CRM Analytics dashboards and apps 28/07/2024, 5:36 pm Classic
3 App Launcher AppLauncher App Launcher tabs 28/07/2024, 5:36 pm Classic
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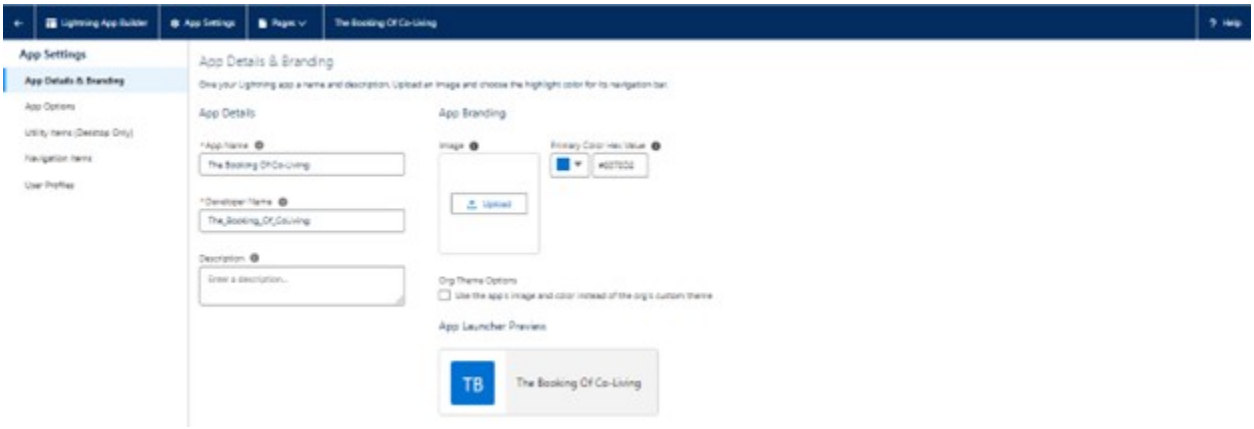
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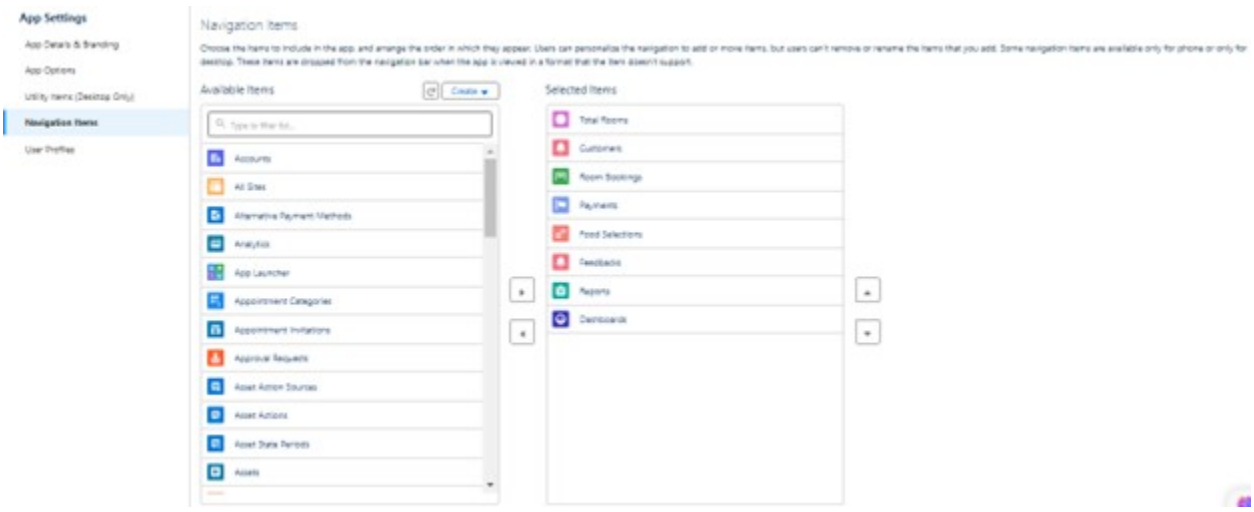
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Available Items
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Accounts
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories
Appointment Invitations
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Customers
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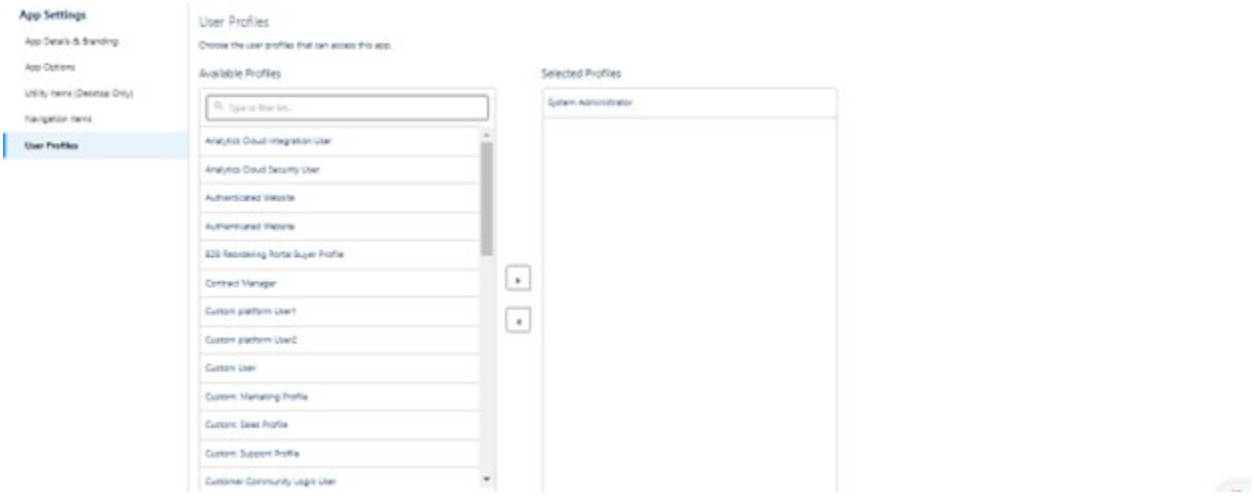
Payments
Food Selections
Feedbacks
Reports
Dashboards



Task 5 : Fields & Relationships

In Salesforce, Fields represent the data stored in the columns of a relational database and hold specific information for an object. Fields can be of two types: Standard Fields and Custom Fields.

Standard Fields are predefined and perform essential tasks. They cannot be deleted unless they are non-required standard fields. Common standard fields include "Created By," "Owner," "Last Modified," and fields created during object setup.

Custom Fields are user-defined and can be customized as needed. Unlike Standard Fields, Custom Fields are flexible and can be added or removed based on user requirements. The decision to include Custom Fields depends entirely on the user's needs.

Activity 1 : Creation of fields for the customer1 object

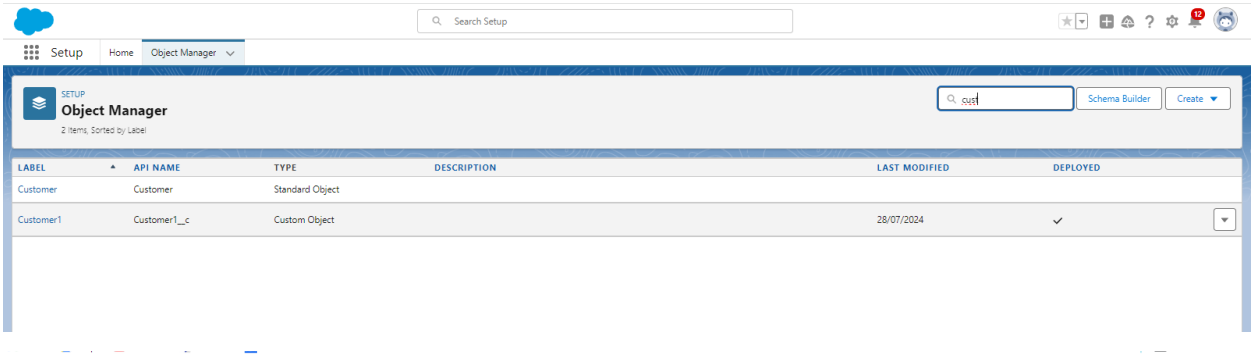
To create fields in an object (Customer1), go to Setup, click on Object Manager, and search for the object (Customer1). Click on the object and then select "Fields & Relationships" > "New."

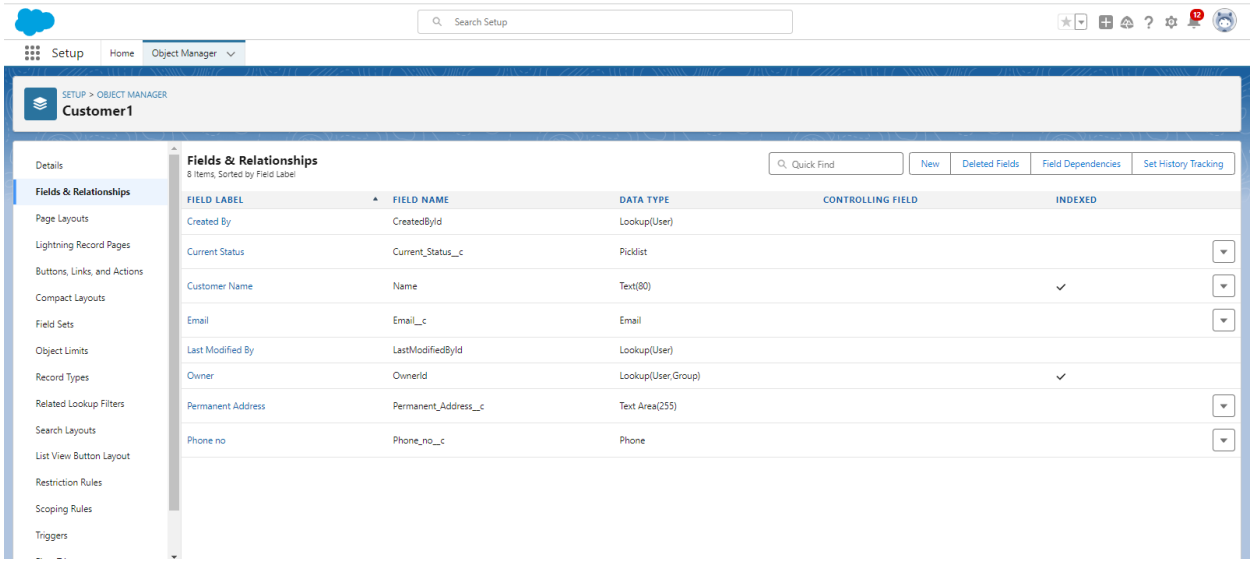
1. For a **Phone field**, select the data type "Phone," label it "Phone No," and click

"Next" > "Next" > "Save and New."

2. For an **Email field**, select the data type "Email," label it "Email," and click "Next" > "Next" > "Save and New."
3. For a **Text Area field**, select the data type "Text Area," label it "Permanent Address," and click "Next" > "Next" > "Save and New."
4. For a **Picklist field**, select the data type "Picklist," label it "Current Status," and enter values (Student, Employee, Others). Mark it as required, then click "Next" > "Next" > "Save and New."

Repeat these steps as needed for each field type.





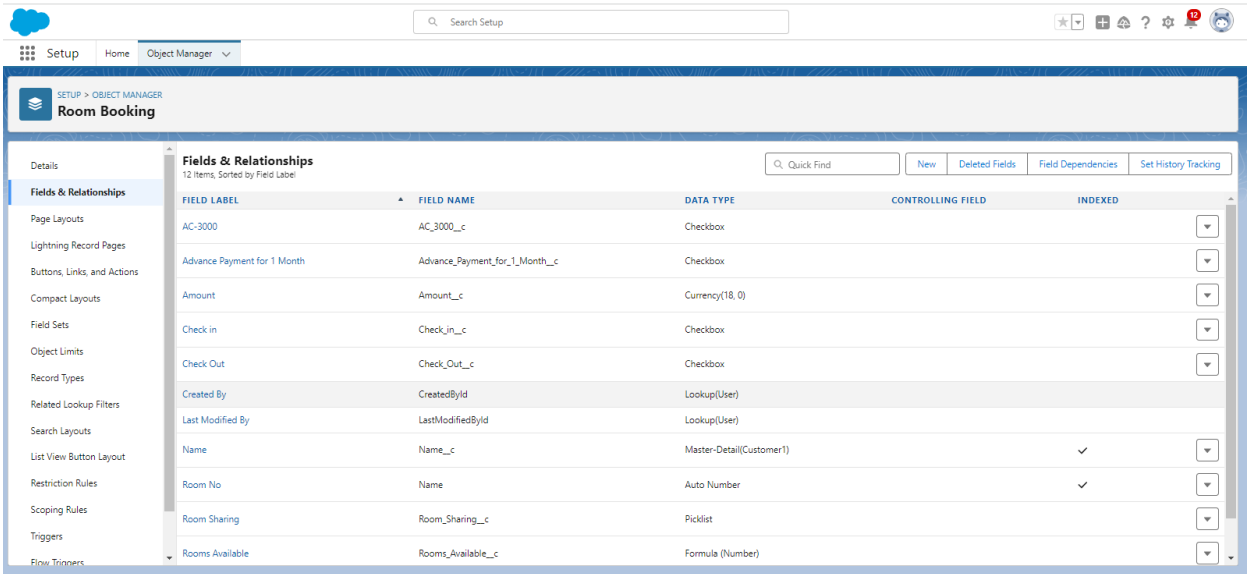
Activity 2 :

Creation of fields for the Room Booking object

To create fields for the Room Booking object, go to Setup > Object Manager, search for "Room Booking," and select it. Then, under "Fields & Relationships," follow these steps:

1. **Picklist Field (Room Sharing):** Add values (Single, Double, Triple sharing), mark it as required, and save.
2. **Master-Detail Relationship (Customer1):** Select the related object (Customer1), change the label to "Name," and save.
3. **Checkbox Field (AC-3000):** Create and save the checkbox field.
4. **Checkbox Field (Advance Payment for 1 Month):** Create and save the checkbox field.
5. **Currency Field (Amount):** Set the length (18,0), and save.
6. **Master-Detail Relationship (Total Rooms):** Select the related object (Total Rooms), change the label to "Total No Of Rooms," and save.
7. **Roll-Up Summary Field (Total Rooms):** In "Total Rooms," create a roll-up summary for "Rooms Booked," summarizing the count from "Room Bookings."
8. **Formula Field (Rooms Available):** Subtract "Rooms Booked" from 30 in the formula (30 - Total_No_Of_Rooms__r.Rooms_Booked__c), and save.
9. **Checkbox Field (Check-in):** Create and save the checkbox field.
10. **Checkbox Field (Check-out):** Create and save the checkbox field.

Repeat the steps to save and create each field as needed.

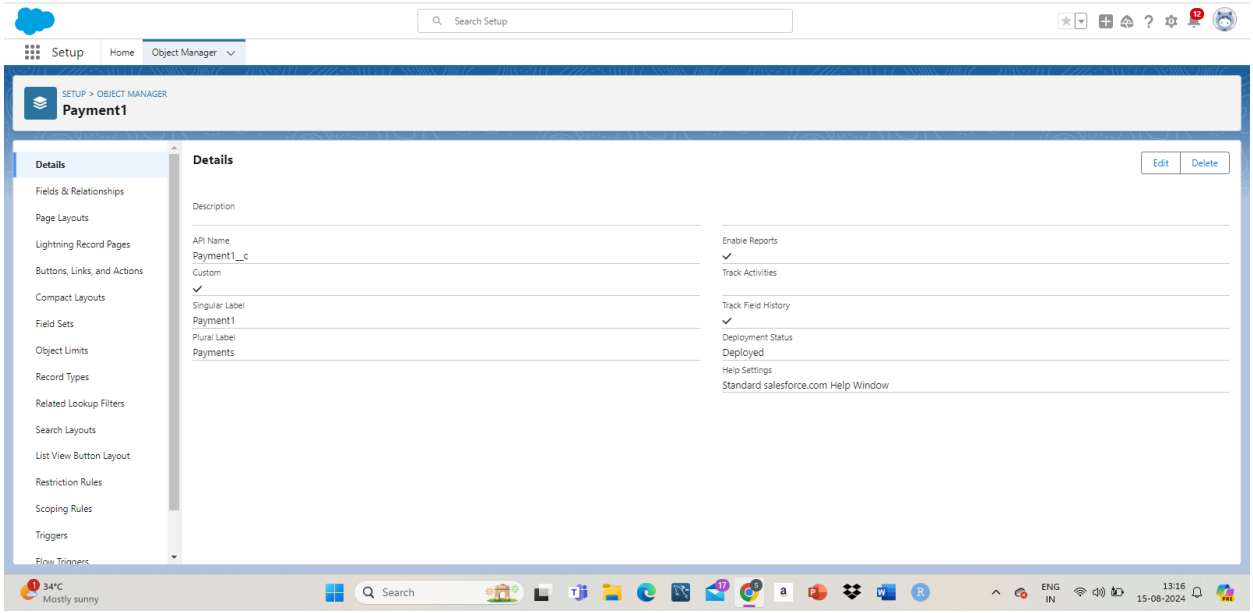


Activity 3 : Creation of Fields & Relationship for Payment1 Object

To create fields and relationships for the Payment1 object, follow these steps:

1. **Master-Detail Relationship to Customer1:** Go to Setup > Object Manager > search "Payment1" > click on the object. Under "Fields & Relationships," click "New," select "Master-Detail Relationship," choose "Customer1" as the related object, and set the Field Label to "Name." Click "Next" > "Next" > "Save and New."
2. **Lookup Relationship to Room Booking:** Go to Setup > Object Manager > search "Payment1" > click on the object. Under "Fields & Relationships," click "New," select "Lookup Relationship," choose "Room Booking" as the related object, and set the Field Label to "Room Booking." Click "Next" > "Next" > "Save and New."
3. **Picklist Field (Payment Mode):** Go to Setup > Object Manager > search "Payment1" > click on the object. Under "Fields & Relationships," click "New," select "Picklist," enter values (Cash, Check, Credit card, Debit card, UPI, Phonepe, Gpay, Paytm), mark as required, and click "Next" > "Next" > "Save and New."
4. **Cross-Object Formula Field:** Go to Setup > Object Manager > search "Payment1" > click on the object. Under "Fields & Relationships," click "New," select "Formula," enter "Amount" as the Field Label, and in the Advanced Formula section, use "Insert

Field" to select "Room Booking" and the "Amount" field. Click "Insert," "Check Syntax," ensure no errors, then click "Next" > "Next" > "Save and New."

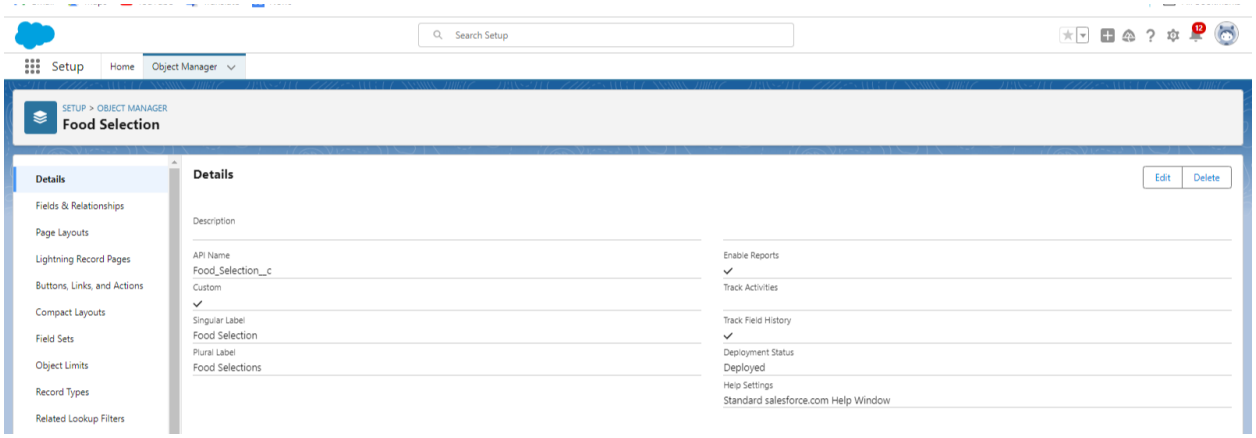


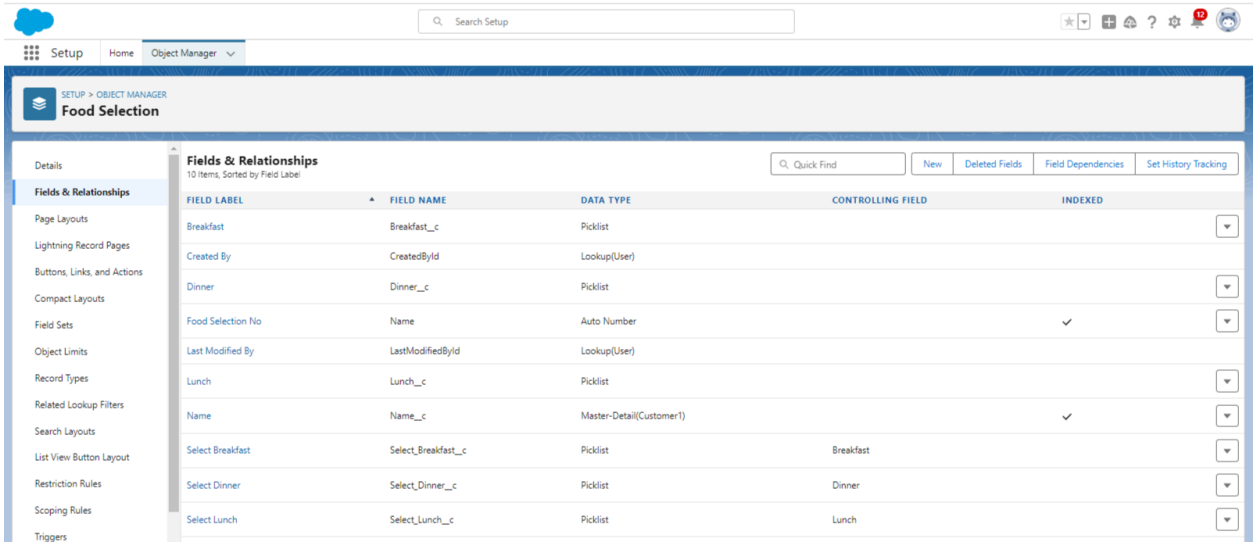
Activity 4 : Creation of fields for the Food Selection object

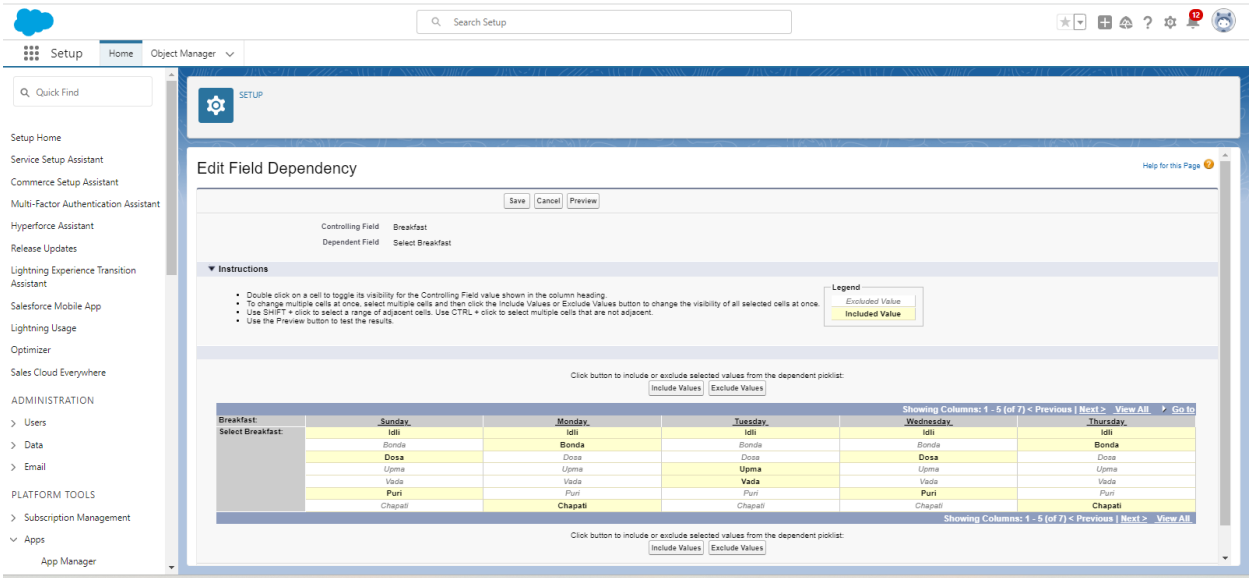
To create fields and field dependencies for the Food Selection object, follow these steps:

1. **Master-Detail Relationship to Customer1:** Go to Setup > Object Manager > search "Food Selection" > click on the object. Under "Fields & Relationships," click "New," select "Master-Detail Relationship," choose "Customer1," set the Field Label to "Name," and click "Next" > "Next" > "Save and New."
2. **Create Picklist Value Set:** Go to Setup > search "Picklist Value Sets" > click "New." Enter the Label, API Name, and values (e.g., Sunday, Monday, etc.), check "Use first value as default," and click "Save."
3. **Picklist Field for Breakfast:** Go to Setup > Object Manager > search "Food Selection" > click on the object. Under "Fields & Relationships," click "New," select "Picklist," choose "Use global picklist value set," select the custom picklist values, and click "Next" > "Next" > "Save and New."
4. **Picklist Field for Select Breakfast:** Follow similar steps as above, entering specific values (Idli, Dosa, etc.), setting "Use first value as default," and clicking "Next" > "Next" > "Save and New."

5. **Field Dependency for Breakfast:** Go to Setup > Object Manager > search "Food Selection" > click on the object. Under "Fields & Relationships," click "Field Dependencies," then "New." Set "Controlling Field" to Breakfast and "Dependent Field" to Select Breakfast. Configure values for each day and click "Save."
6. **Picklist Fields for Lunch and Select Lunch:** Repeat the process for creating Picklist fields with appropriate labels and values, ensuring to set defaults as needed.
7. **Field Dependency for Lunch:** Go to "Field Dependencies" for "Food Selection," create a dependency with "Lunch" as the controlling field and "Select Lunch" as the dependent field. Configure values for each day and click "Save."
8. **Picklist Fields for Dinner and Select Dinner:** Similarly, create Picklist fields for Dinner and Select Dinner with specific values and default settings.
9. **Field Dependency for Dinner:** Create a dependency with "Dinner" as the controlling field and "Select Dinner" as the dependent field. Configure values for each day and click "Save."





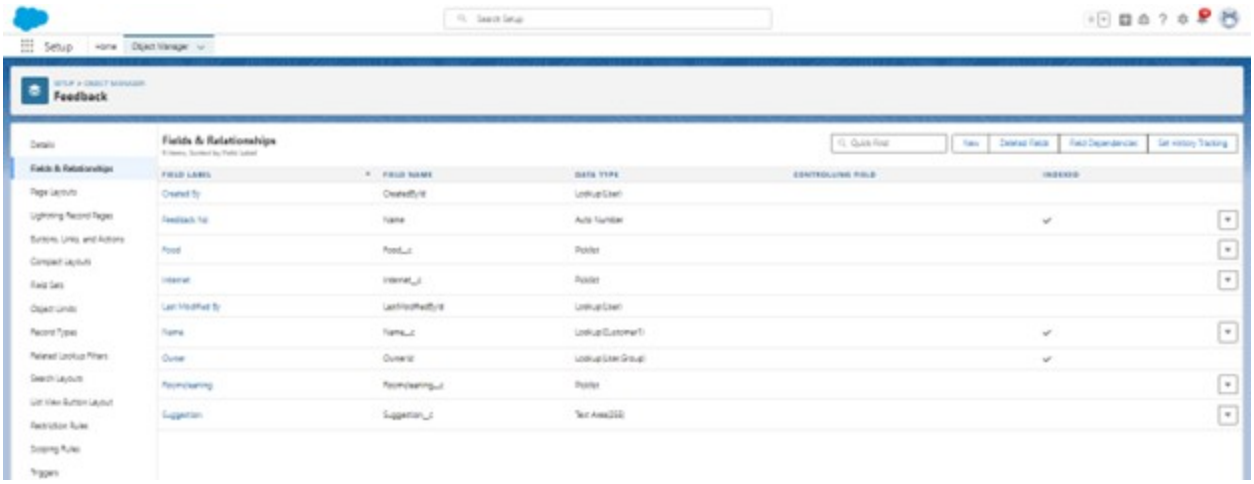


Activity 5 : Creation of fields for the Feedback object

To create fields and relationships for the Feedback object, follow these steps:

1. **Lookup Relationship to Customer1:** Go to Setup > Object Manager > search "Feedback" > click on the object. Under "Fields & Relationships," click "New," select "Lookup Relationship," choose "Customer1," set the Field Label to "Name," and click "Next" > "Next" > "Save and New."
2. **Picklist Field for Roomcleaning:** Go to Setup > Object Manager > search "Feedback" > click on the object. Under "Fields & Relationships," click "New," select "Picklist," set the Field Label to "Roomcleaning," and enter values (Good, Satisfaction, Bad). Click "Next" > "Next" > "Save and New."
3. **Picklist Field for Internet:** Repeat the above steps, setting the Field Label to "Internet" and entering the same values (Good, Satisfaction, Bad). Click "Next" > "Next" > "Save and New."
4. **Picklist Field for Food:** Again, follow the steps to create a Picklist field with the Field Label "Food" and the same values (Good, Satisfaction, Bad). Click "Next" > "Next" > "Save and New."
5. **Text Area Field for Suggestion:** Finally, go to Setup > Object Manager > search "Feedback" > click on the object. Under "Fields & Relationships," click "New," select "Text Area," set the Field Label to "Suggestion," and click "Next" > "Next" > "Save and

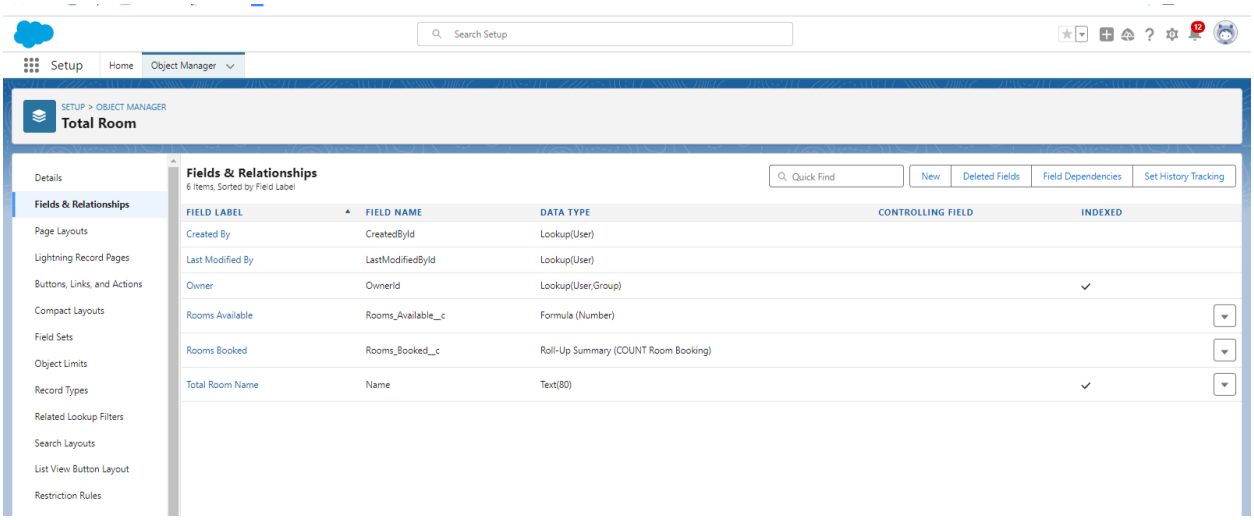
New."



Activity 6 : Creation of fields for the Total Rooms object

To create a formula field in the Total Rooms object, follow these steps:

1. Go to **Setup** > **Object Manager** > type **Total Rooms** in the search bar > click on the object.
2. Click on **Fields & Relationships** > **New**.
3. Select **Formula** as the Data Type and click **Next**.
4. Fill in the details:
    - **Field Label:** Rooms Available
    - **Field Name:** (auto-generated)
    - **Formula Return Type:** Number
    - **Decimal Places:** 0
    - Click **Next**.
5. In the **Advanced Formula** section, enter the formula 30 - Rooms_Booked__c and click **Check Syntax** to ensure there are no errors.
6. Click **Next** > **Next** > **Save and New** to complete the process.

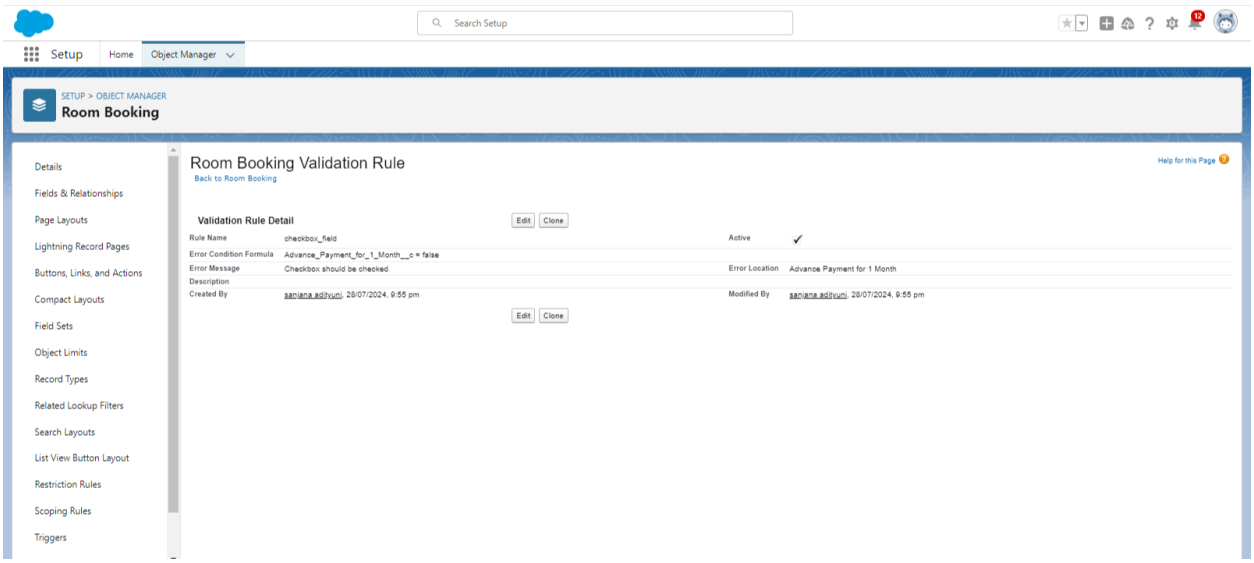


Task 6 : Validation rule

To create a validation rule in Salesforce, go to **Setup** > **Object Manager** > select the desired object. Click on **Validation Rules** > **New Rule**. Enter a **Rule Name** and define the **Error Condition Formula** to specify when the rule should trigger. Provide an **Error Message** to display when the validation fails and choose where the message should appear. Click **Save** to activate the rule. This ensures data entered into the object meets your criteria before the record can be saved.

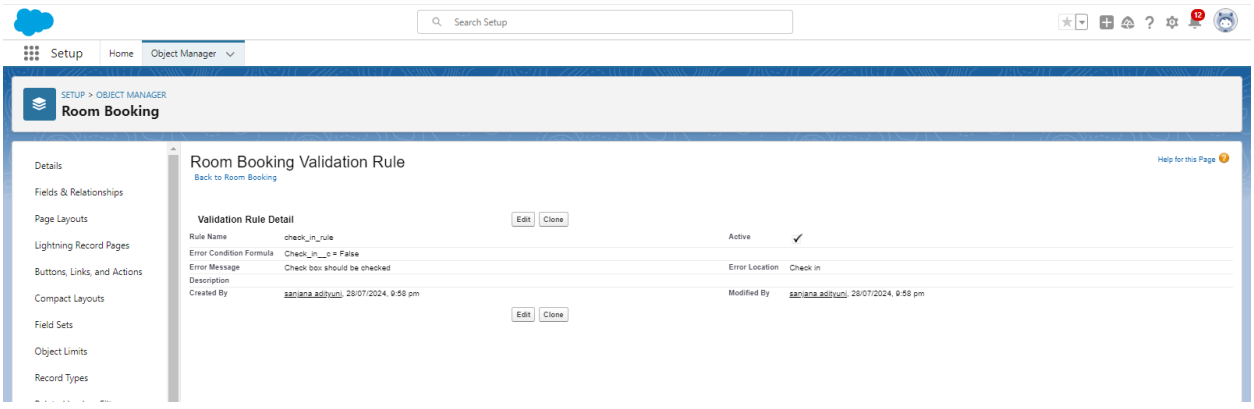
Activity 1 : create a validation rule to an Room Booking Object

To create a validation rule for the Room Booking object, go to **Setup** and select **Object Manager**. Search for "Room Booking," then click on **Validation Rules** and choose **New**. Name the rule "checkbox field," ensure it is active, and enter the formula Advance_payment_for_1month__c = false to trigger an error if the checkbox is unchecked. Set the error message to "Checkbox should be checked" and select the field location for the error as "Advance payment for 1month." Finally, click **Save** to implement the rule.



Activity 2 : create a Another validation rule to an Room Booking Object

To create a validation rule for the Room Booking object, navigate to **Setup** and open **Object Manager**. Search for "Room Booking," then go to **Validation Rules** and click **New**. Name the rule "check in rule," ensure it is active, and enter the formula Check_in__c = False to enforce that the checkbox must be checked. Set the error message to "Check box should be checked" and select "Check in" as the error location. Finally, click **Save** to apply the rule.

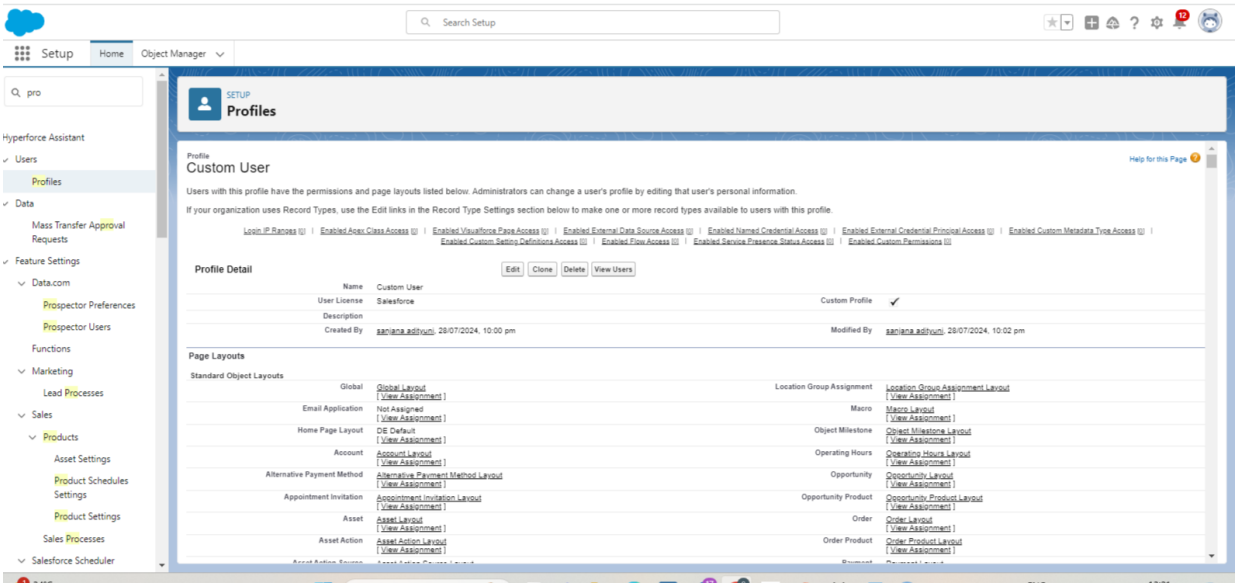


Task 7 : Profile

A profile in Salesforce is a set of permissions and settings that controls what users can access and do within the platform. Profiles manage various aspects like object and field permissions, user permissions, tab and app settings, and access to Apex classes and Visualforce pages. Salesforce offers **Standard Profiles**, such as System Administrator and Marketing User, which come with predefined permissions and cannot be deleted. In contrast, **Custom Profiles** are created by users to meet specific needs and can be deleted if no users are assigned to them. Profiles are crucial for defining user roles and access based on job functions.

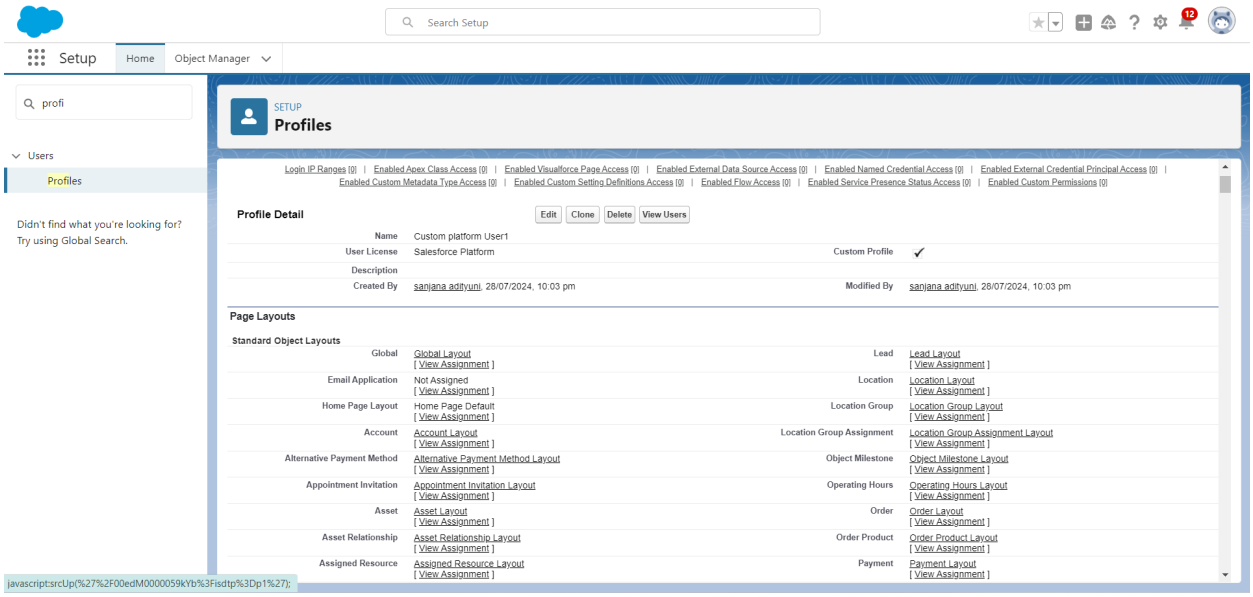
Activity 1 : Custom user Profile

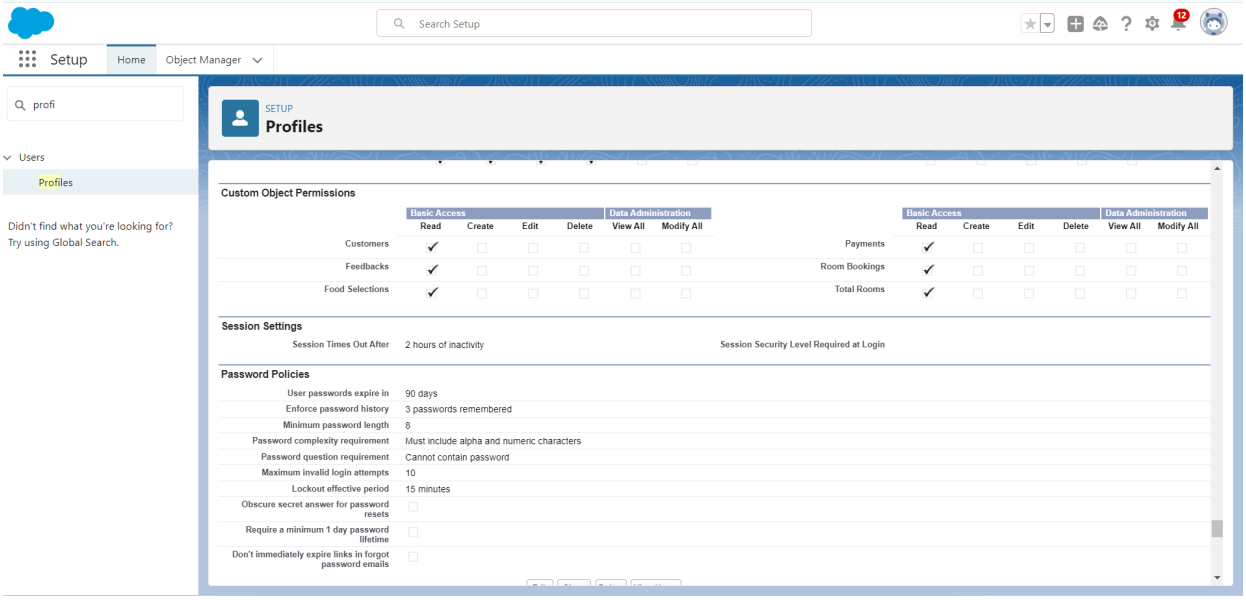
To create a new profile in Salesforce, go to Setup and search for "Profiles" in the Quick Find box. Click on Profiles and select "Clone" next to the desired standard profile, such as "Standard User." Name the new profile (e.g., "Custom User") and save it. On the profile page, click "Edit," scroll down to the Custom Object Permissions section, and grant "All" access permissions for objects like Customers, Feedbacks, Food Selections, Payments, Room Bookings, and Total Rooms. Finally, click "Save" to apply the changes.



Activity 2 : Custom platform user1

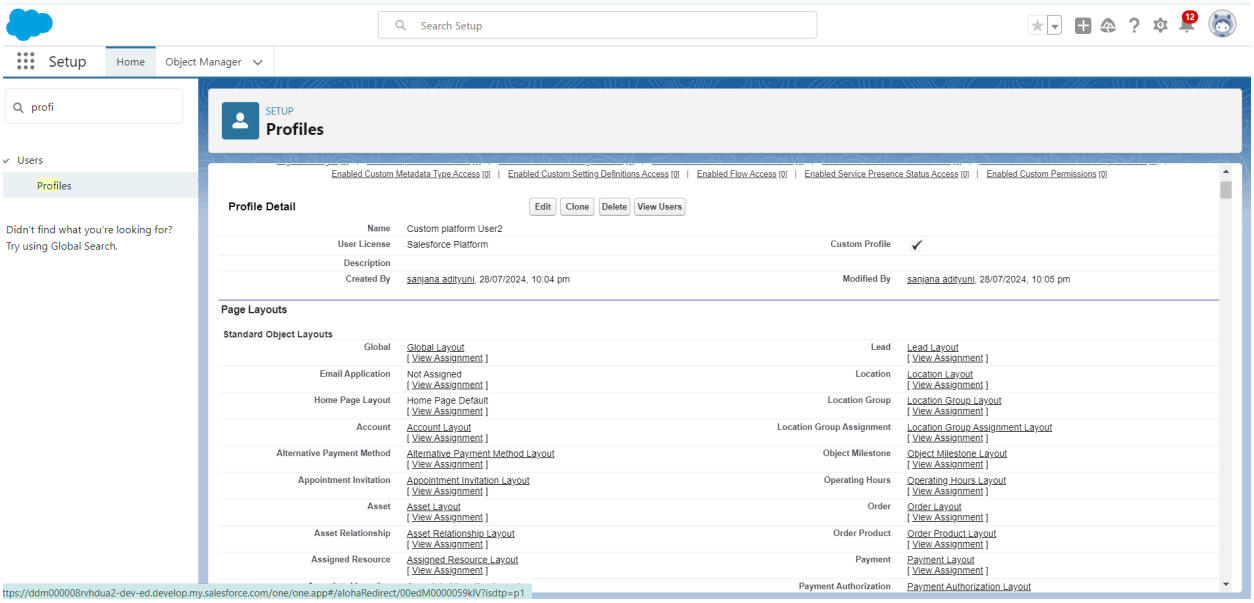
To create a new profile, navigate to Setup and search for "Profiles" in the Quick Find box. Click on Profiles and then "Clone" next to the "Standard Platform User" profile. Name the new profile "Custom Platform User1" and save it. On the profile page, click "Edit," scroll to the Custom Object Permissions section, and assign "Read" access to objects such as Customers, Feedbacks, Food Selections, Payments, Room Bookings, and Total Rooms. Finally, click "Save" to apply the changes.

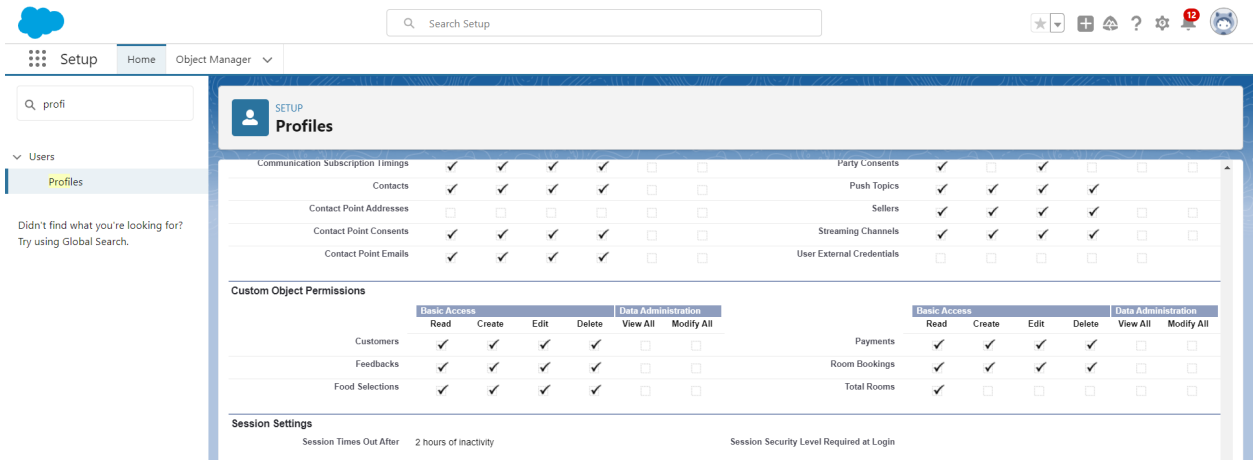




Activity 3 : Custom platform user2

To create a new profile, go to Setup and search for "Profiles" in the Quick Find box. Click on Profiles, then select "Clone" next to the "Standard Platform User" profile. Name the new profile "Custom Platform User2" and save it. On the profile page, click "Edit," scroll to the Custom Object Permissions section, and assign "Create," "Read," "Edit," and "Delete" access to Customers, Feedbacks, Food Selections, Payments, and Room Bookings. Grant "Read" access to the Total Rooms object. Scroll down and click "Save" to finalize the changes.



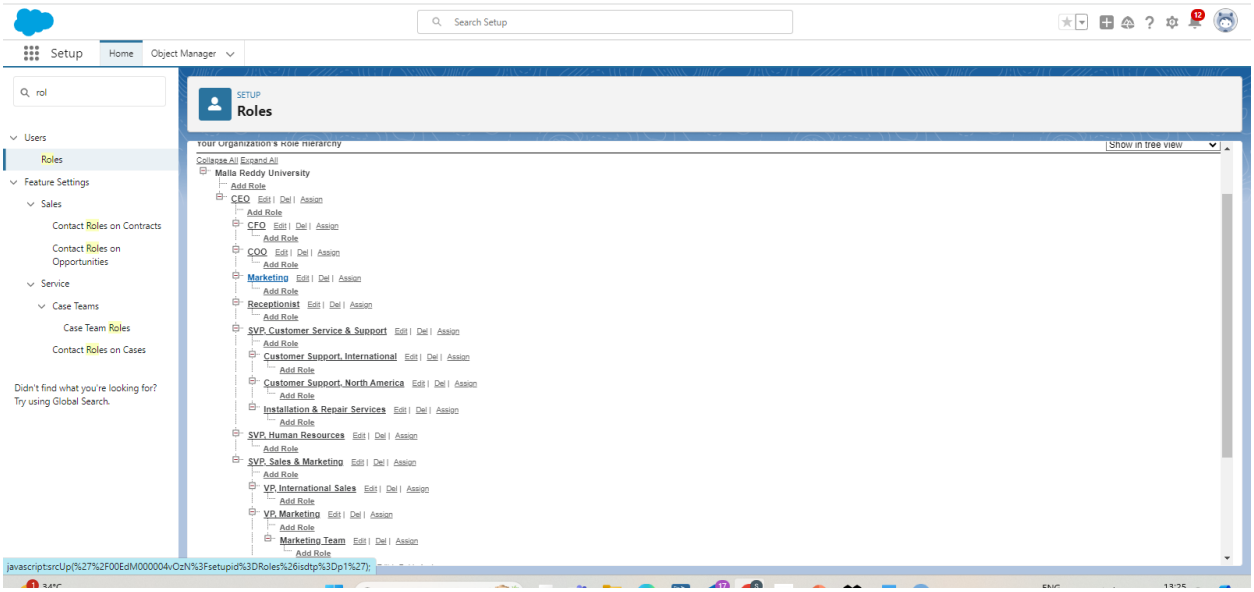


Task 8 : Roles

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

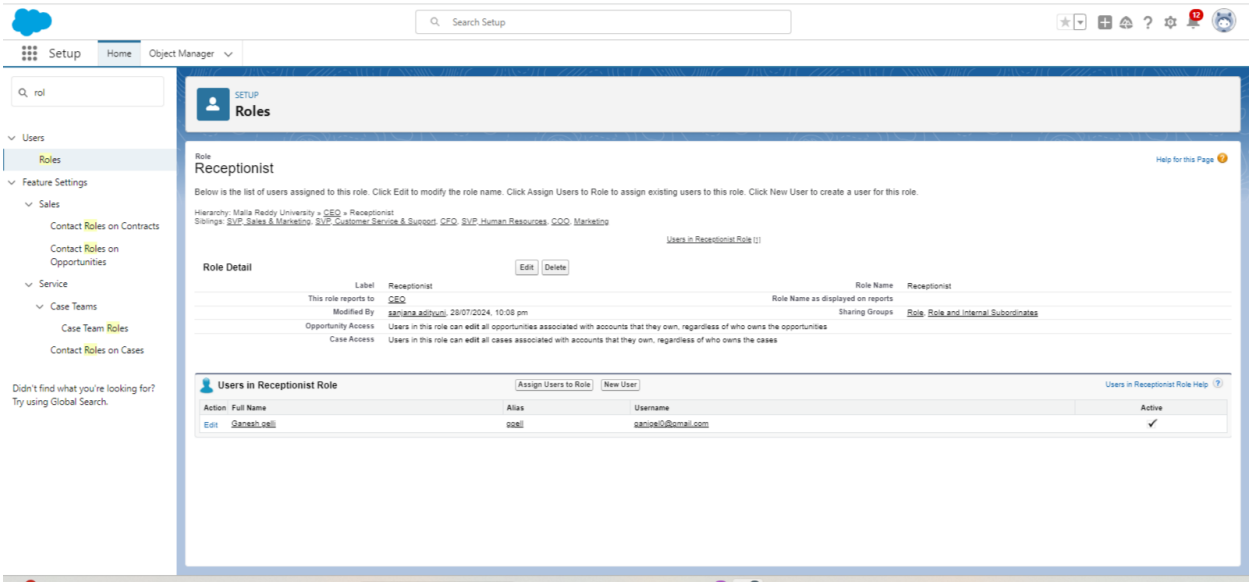
Activity 1 : Marketing Role

To create a new role, go to Quick Find and search for "Roles." Click on "Setup Roles" and then "Expand All." Under the CEO role, click "Add Role." Enter "Marketing" as the label, and the role name will auto-populate. Click "Save" to finalize the creation of the new role.



Activity 2 : Receptionist Role

To create a new role, go to Quick Find, search for "Roles," and click on "Setup Roles." Click "Expand All" and then "Add Role" under the CEO role. Enter "Receptionist" as the label, and the role name will auto-populate. Click "Save" to create the new role.

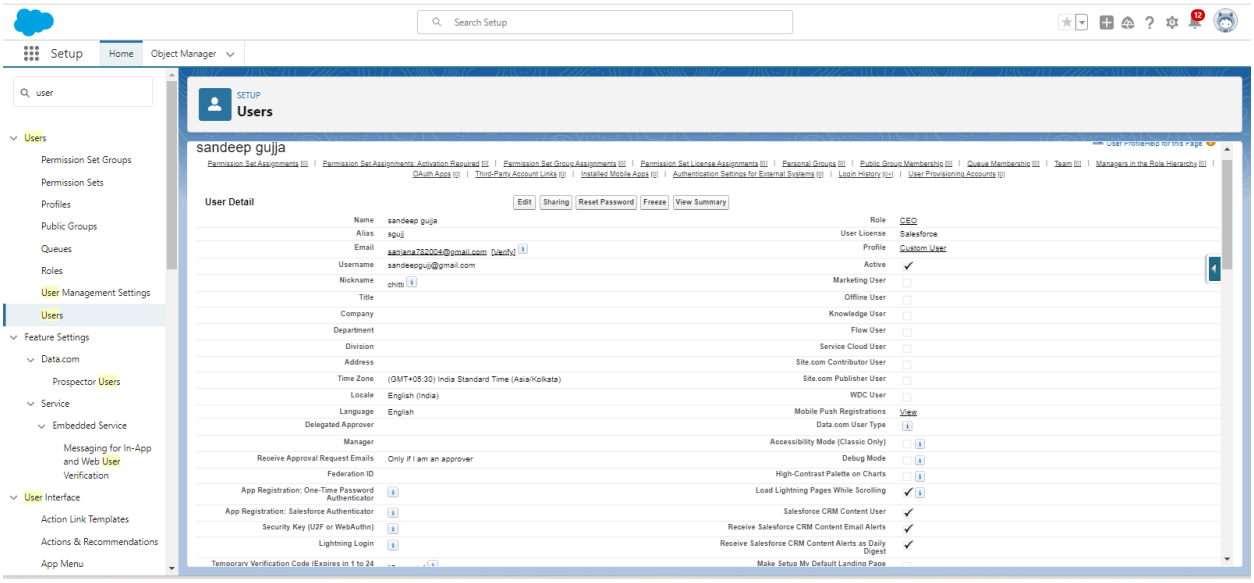


Task 9 : Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

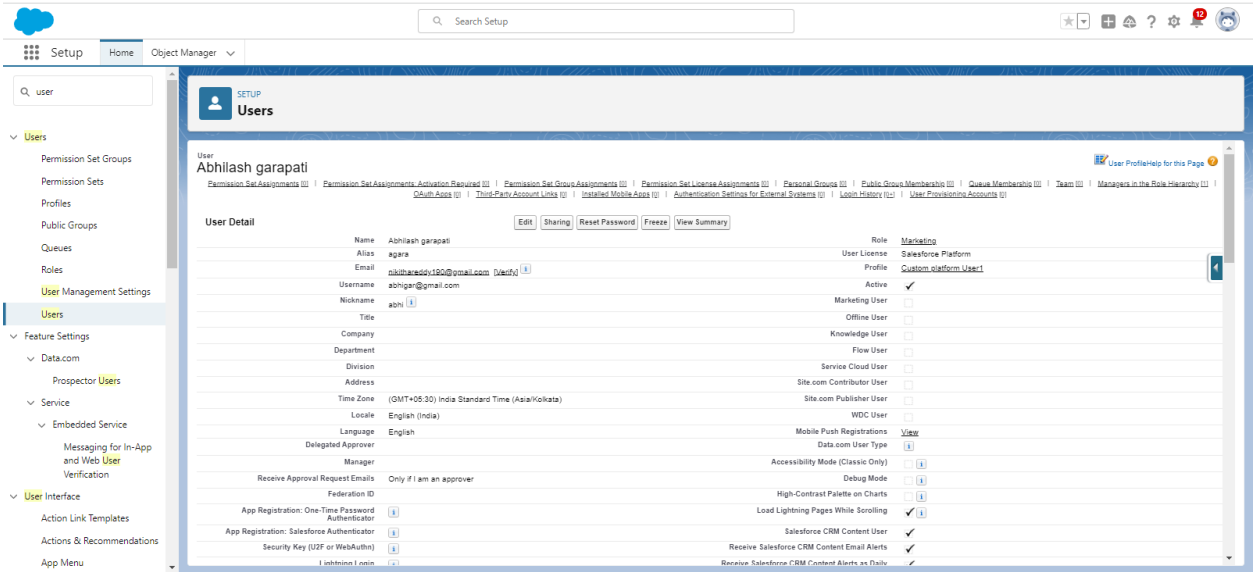
Activity 1 : Create User

To create a new user in Salesforce, go to Setup, search for "Users" in the Quick Find box, and select "Users." Click "New User" and enter the required details: First Name (Sandeep), Last Name (Gujja), Alias, Email, Username (in the format text@text.com), Nickname, Role (CEO), User License (Salesforce), and Profile (Custom User). Click "Save" to complete the process.



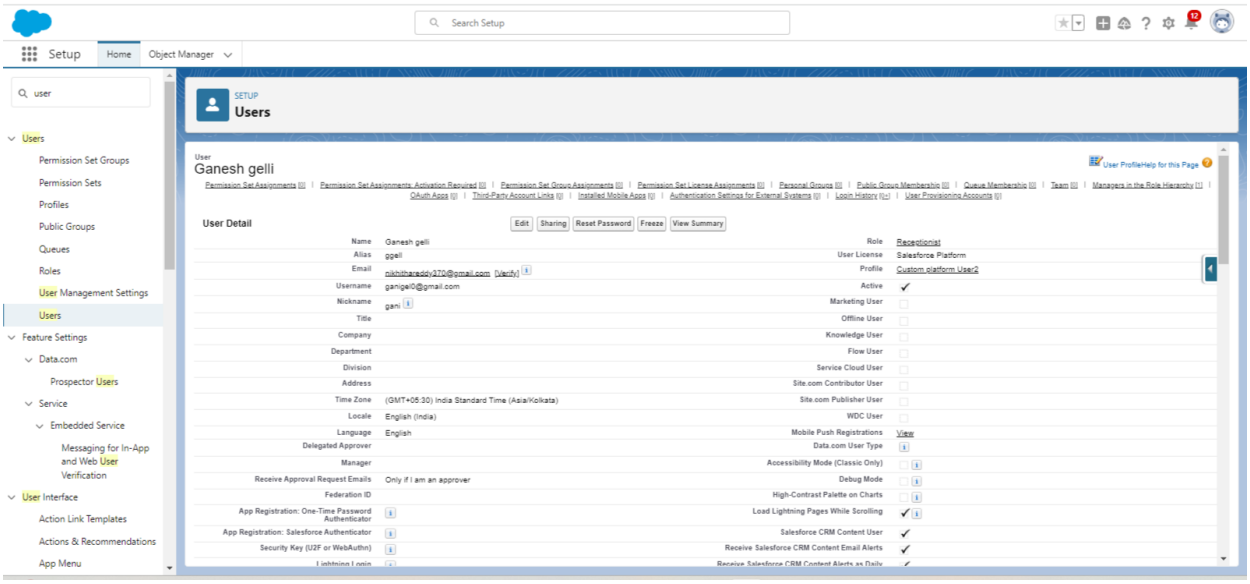
Activity 2 : Create Another User

To create a new user in Salesforce, go to Setup, search for "Users" in the Quick Find box, and select "Users." Click "New User" and fill in the following fields: First Name (Abhilash), Last Name (Garapati), Alias, Email (your personal email), Username (in the format text@text.com), Nickname, Role (Marketing), User License (Salesforce Platform), and Profile (Custom Platform User1). Click "Save" to complete the process.



Activity 3 : Create Another User

To create a new user in Salesforce, go to Setup, type "Users" in the Quick Find box, and select "Users." Click "New User" and enter the following details: First Name (Ganesh), Last Name (Gelli), Alias, Email (your personal email), Username (formatted as text@text.com), Nickname, Role (Receptionist), User License (Salesforce Platform), and Profile (Custom Platform User2). Click "Save" to complete the creation of the user.



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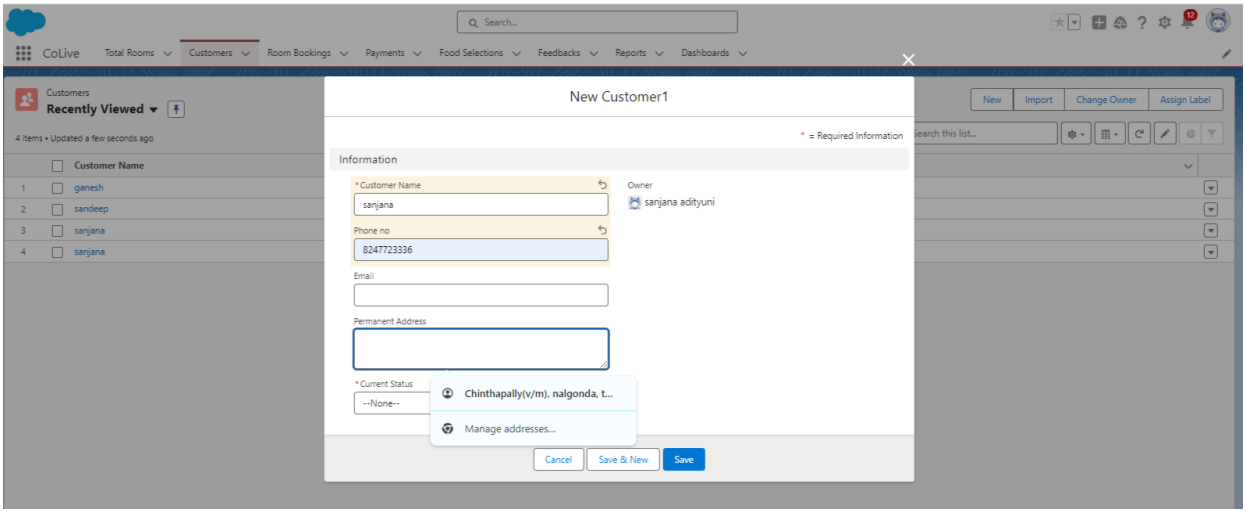
Task 10 : User Adoption

User Adoption

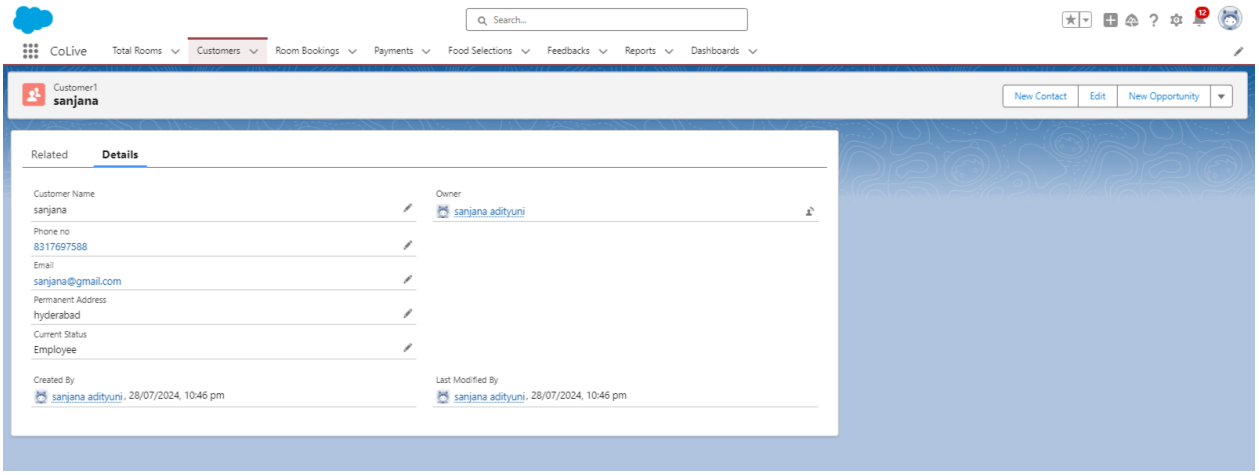
Activity 1 : Create a Record (Customers)

To create a new record, click on the App Launcher on the left side of the screen and search for "Home Feels." Select it to open the app. Navigate to the "Customers" tab, then click "New" to start creating a new record. Fill in the required details and click "Save" to complete the process.



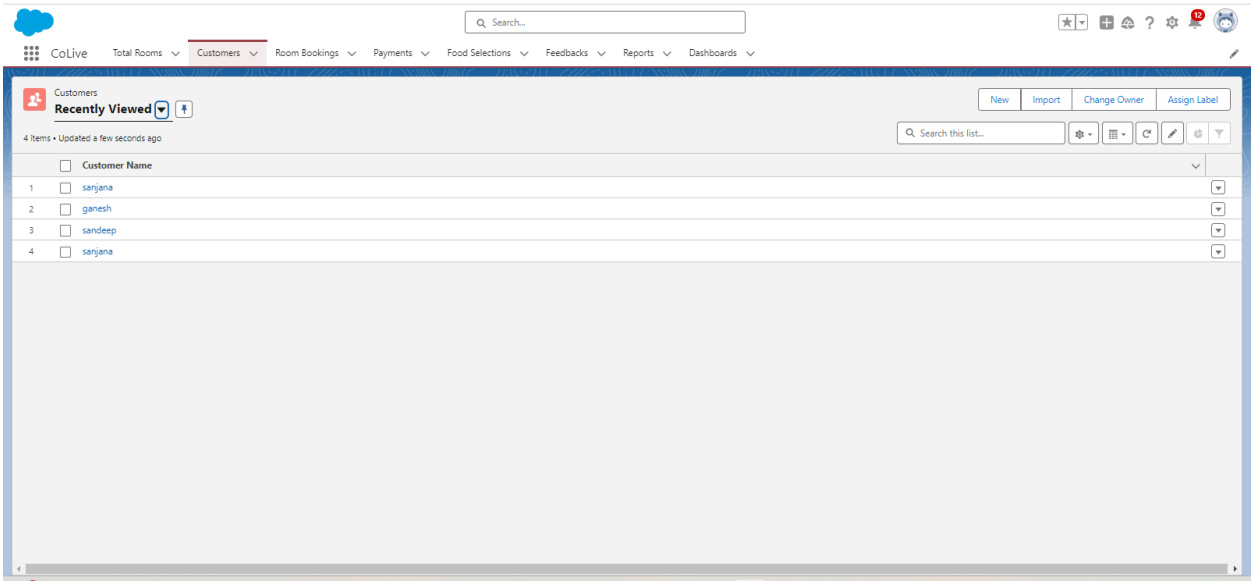
Activity 2 : View a Record (Customers)

To view customer details, click on the App Launcher on the left side of the screen and search for "Home Feels." Select it to open the app, then go to the "Customer" tab. Click on the name of any record to view the details of that customer.



Activity 3 : Delete a Record (Customers)

To delete a customer record, click on the App Launcher on the left side of the screen and search for "Home Feels," then select it. Navigate to the "Customers" tab and click the arrow icon next to the specific record you want to delete. Choose "Delete" from the dropdown menu, and confirm by clicking "Delete" again.



Task 11 : Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

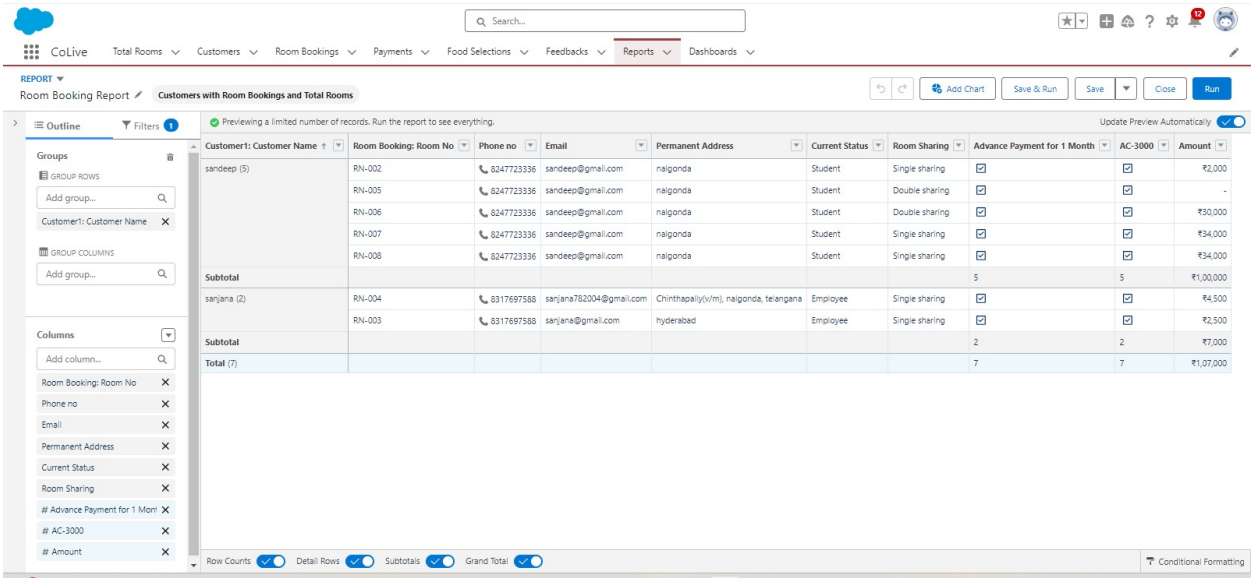
Types of Reports in Salesforce

- Tabular
- Summary
- Matrix
- Joined Reports

Activity 1 : Create Report

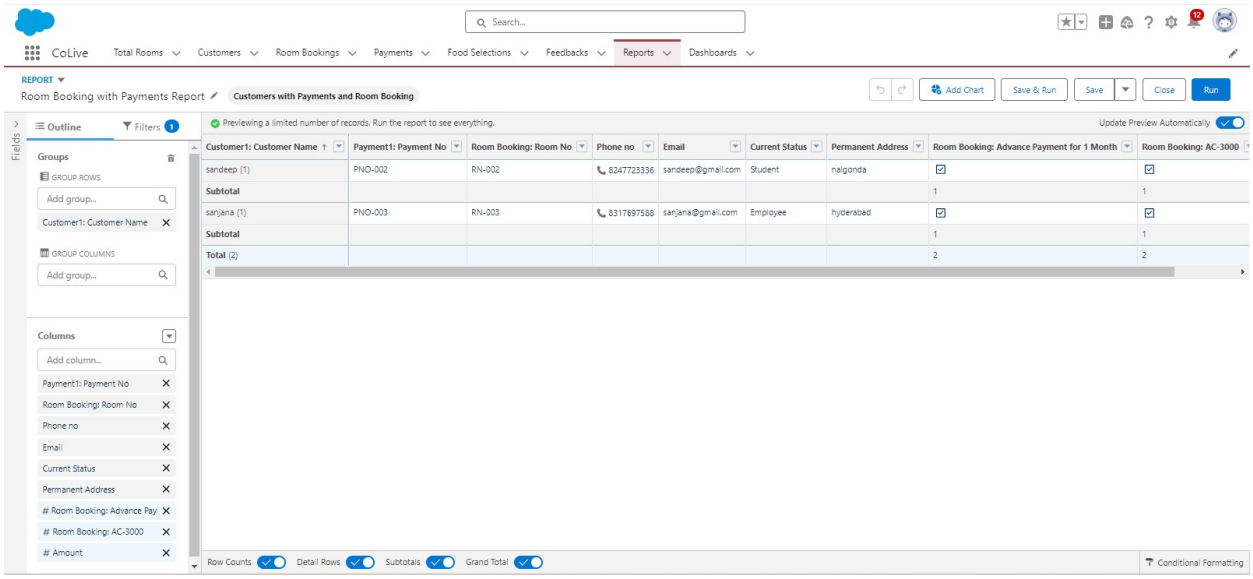
To create a report, go to the app and click on the "Reports" tab, then click "New Report." Select the report type "Customers with Room Bookings with Total Rooms" from the category, report type panel, or search panel, and click "Start Report." Customize the report by adding fields from the left pane as needed. Finally, either

save or run the report.



Activity 2 : Create another Report

To create a report, go to the app and click on the "Reports" tab, then click "New Report." Choose the report type "Customer with Room Booking with Payments" from the category, report type panel, or search panel, and click "Start Report." Customize the report by adding fields from the left pane as needed. Finally, save or run the report.

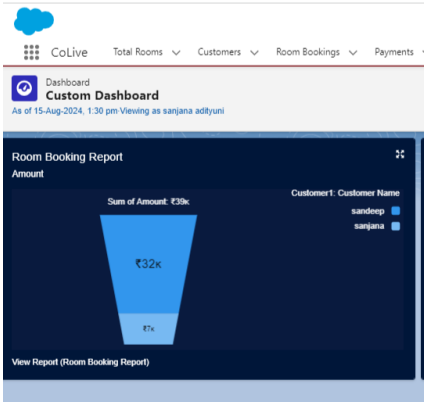


Task 12 : Dashboards

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.

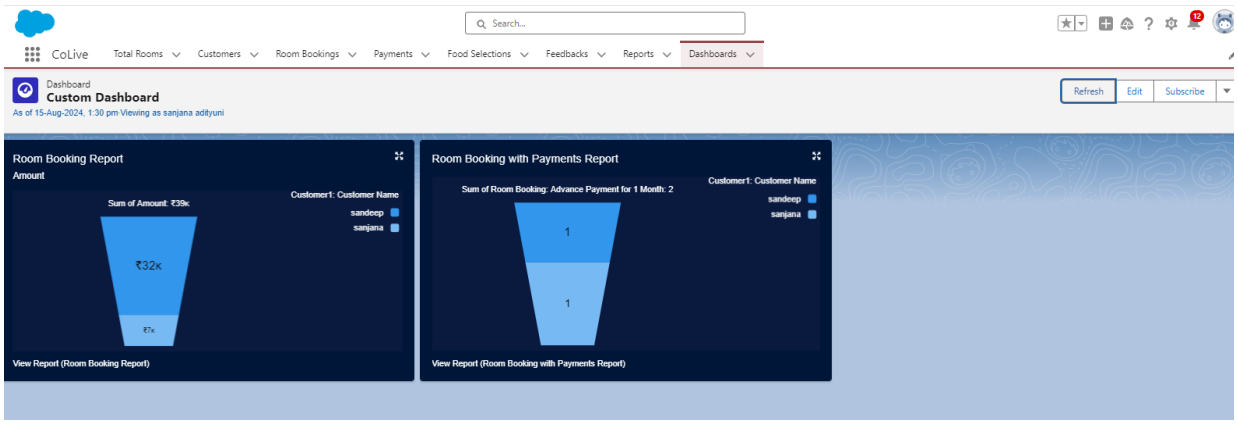
Activity 1 : Create Dashboard

To create a dashboard, go to the app and click on the "Dashboard" tab, then click "New Dashboard." Enter a name and click "Create." Select "Add Component," choose the "Customer with Room Booking" report, and click "Select." After adding the component, click "Save," and then click "Done."



Activity 2 : Create Another Dashboard

To create a new dashboard, go to the app, click on the "Dashboard" tab, and select "New Dashboard." Enter a name and click "Create." Choose "Add Component," select the "Customer with Room Booking with Payments" report, and click "Select." After adding the component, click "Save" and then click "Done."



Task 13 : 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.

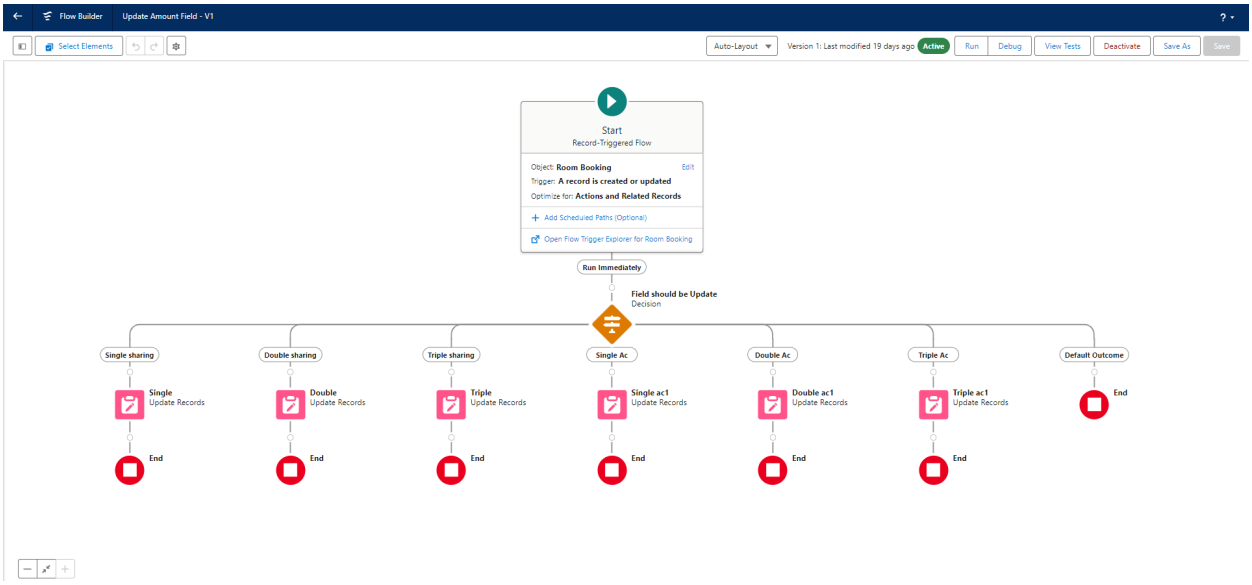
Why do we need to create a flow:

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.

Activity 1 : Create a Flow

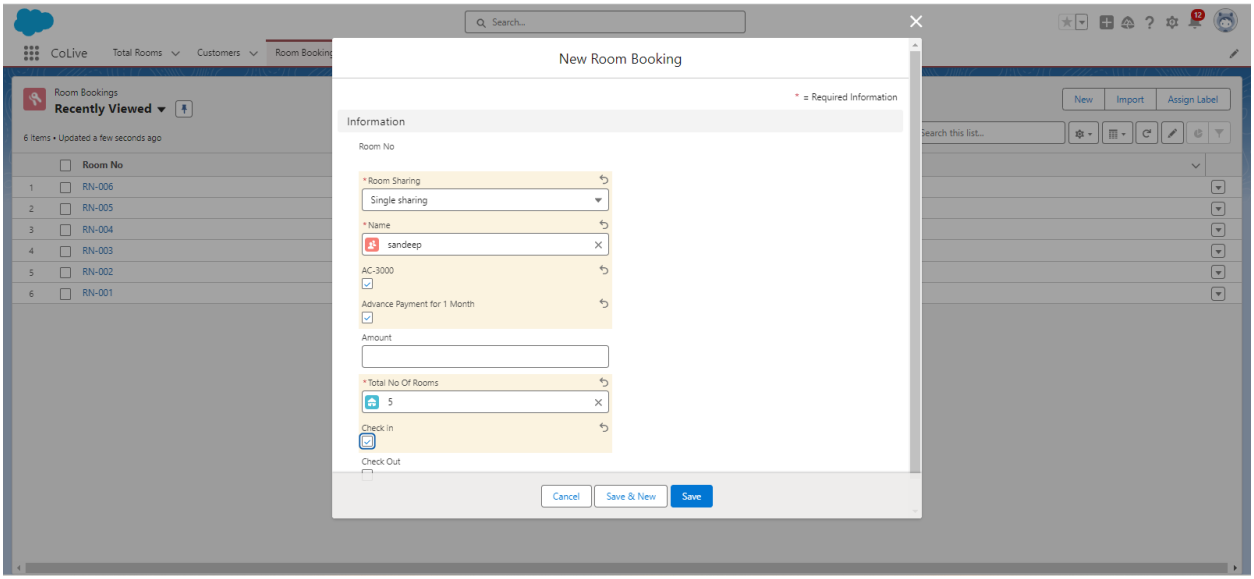
To create a Record-Triggered Flow in Salesforce that updates the amount based on room sharing and AC options, first, navigate to Setup, search for "Flow," and create a new Record-Triggered Flow for the "Room Booking" object. Set the trigger to run when a record is created or updated, and optimize it for "Actions and Related Records." Next, add a Decision element with conditions that check the type of room sharing (Single, Double, Triple) and whether the AC option is selected. For each outcome of the decision, create Update Records actions to set the corresponding amount based on the room type and AC option. Once all conditions and actions are defined, save the flow with a suitable name, such as "Update Amount Field." This flow will automatically update the amount field in the Room Booking object when

relevant criteria are met.



Activity 2 : Test the Flow

In the Co-living app, navigate to the Room Sharing tab and click on "New" to create a new record. Enter details such as Name, Room Sharing, AC-3000, and Advance Payment for 1 Month, leaving the Amount field empty before saving. Once the record is saved, the Amount field will automatically populate based on the flow you created, which updates the amount according to the room sharing type and AC selection.


CoLive
Total Rooms
Customers
Room Bookings
Recently Viewed
6 items • Updated a few seconds ago
Room No
RN-006
RN-005
RN-004
RN-003
RN-002
RN-001
New
Import
Assign Label
New Room Booking
* = Required Information
Information
Room No
*Room Sharing
Single sharing
*Name
sandeep
AC-3000
Advance Payment for 1 Month
Amount
*Total No Of Rooms
5
Check in
Check Out
Cancel
Save & New
Save

THANK YOU !!