StayEase CRM

◆ Phase 1: Problem Understanding & Scope

Introduction

Accommodation management is a global challenge affecting multiple groups:

- **Tourists & Travellers** – who require short-term stays during holidays, business trips, or weekend travel.
- **Students & Working Professionals** – who require long-term rentals such as PGs, hostels, or apartments close to colleges, offices, or city hubs.

The market faces several issues:

- **Unverified listings** leading to trust issues.
- **Scattered communication** between host and guest.
- **Manual or broker-driven processes** causing inefficiency.
- **Lack of transparency** in payments, booking status, and reviews.

Proposed Solution

StayEase CRM is a Salesforce-powered rental and accommodation CRM platform, inspired by Airbnb but tailored for both **short-term tourism** and **long-term student/professional housing**.

It provides:

- A unified system for **Hosts** to list properties.
- A booking system for **Guests** (tourists, students, professionals).
- End-to-end tracking of **Properties → Bookings → Payments → Feedback**.
- Role-based access and automation to ensure security and efficiency.
- Reports & dashboards for business insights.

Objectives

1. Create a **centralized rental management system** for hosts and guests.
2. Provide **dual booking options**: short-term (tourists) and long-term (students/professionals).
3. Enable **automation** for bookings, payments, and complaint handling.
4. Maintain **data integrity & security** via roles, profiles, and sharing.
5. Deliver **reports & dashboards** for revenue, occupancy, and performance insights.

◆ **Phase 2: Org Setup & Security**

Roles

- **CEO** → Sees everything (reports, dashboards).
- **Operations Manager** → Oversees bookings, complaints, escalations.
- **Host** → Manages their own properties & related bookings.
- **Guest (Traveller/Student/Professional)** → Creates bookings, raises complaints.
- **System Admin** → You (full control).

Profiles

- **Host Profile** → Create/Edit Properties, view related Bookings & Complaints.
- **Guest Profile** → Create/Edit their own Bookings & Complaints, view Properties.
- **Ops Manager Profile** → Manage all records except setup.
- **CEO Profile** → Read/report only.

Org-Wide Defaults (OWD)

- **Property__c** → Private.
- **Booking__c** → Private.
- **Complaint__c** → Private.
- **Payment__c** → Private.

Public Groups & Sharing Rules

- Public Groups for `Hosts` and `Ops Managers`.
- Sharing rules to ensure Ops Managers see all bookings and properties.
- Flows to assign record owners properly (so Host sees only their bookings).

◆ **Phase 3: Data Model & Object Setup**

Objects & Key Fields

1. **Guest__c (Traveller/Student/Professional)**
   - Guest ID (Auto Number)
   - Name, Email, Phone
   - Type (Picklist: Tourist, Student, Professional)
   - Budget (Currency)
2. **Host__c**
   - Host ID (Auto Number)
   - Name, Contact Info
   - Total Properties (Roll-up Summary)
   - Host Rating (Formula/Roll-up from Guest feedback)
3. **Property__c**
   - Property ID (Auto Number)
   - Host Lookup

- o Type (Flat, PG, Hostel, House, Villa)
- o Rent per Night / Month (Currency)
- o Location, Amenities (Picklist)
- o Availability (Checkbox)
- o Max Occupancy (Number)
4. **Booking__c**
   - o Booking ID (Auto Number)
   - o Guest Lookup, Property Lookup
   - o Status (Requested, Confirmed, Checked-In, Checked-Out, Closed)
   - o Check-In, Check-Out
   - o Number of Guests (Number)
   - o Total Rent (Formula = Nights × Rent per Night)
5. **Payment__c**
   - o Payment ID (Auto Number)
   - o Booking Lookup
   - o Amount (Currency)
   - o Status (Pending, Completed, Failed)
   - o Transaction Date
6. **Complaint__c**
   - o Complaint ID (Auto Number)
   - o Guest Lookup, Property Lookup
   - o Type (Maintenance, Cleanliness, Payment, Other)
   - o Status (Open, In Progress, Resolved, Closed)
   - o Description, Resolution Notes

Relationships (ERD Overview)

- **Host → Property (1:N)**
- **Property → Booking (1:N)**
- **Guest → Booking (1:N)**
- **Booking → Payment (1:1)**
- **Guest → Complaint (1:N)**
- **Property → Complaint (1:N)**

Page Layouts & Record Types

- **Guest** → Simple layout (Bookings, Complaints).
- **Host** → Property layout (Bookings & Complaints related list).
- **Booking** → Record Types: Short Stay vs Long Stay.

◆ Phase 4: Automation & Business Logic

Flows

1. **Booking Confirmation Flow**
   o On Booking.Status = Confirmed → Property.Availability = False.
   o Send email to Guest & Host.
2. **Check-Out Flow**
   o On Booking.Status = Checked-Out → Property.Availability = True.
   o Calculate Total Rent.
3. **Complaint Escalation Flow**
   o If Complaint.Status = Open for 48 hours → escalate to Ops Manager.

Validation Rules

- Check-In < Check-Out.
- Number_of_Guests ≤ Property.Max_Occupancy.
- Booking cannot be Closed without End Date.

Approval Process

- For high-rent bookings (e.g., > ₹50,000) → require Ops Manager approval.

◆ Phase 5: Reports & Dashboards

Reports

1. **Revenue Report** – Total rent by property, host, month.
2. **Occupancy Report** – Properties booked vs available.
3. **Complaint Report** – Complaints by type/status.
4. **Top Hosts Report** – Hosts ranked by revenue/ratings.
5. **Guest Trends Report** – Returning vs new guests.

Dashboards

- **CEO Dashboard** – Revenue, Occupancy %, Complaints, Top Hosts.
- **Host Dashboard** – My Properties, My Bookings, My Complaints.
- **Ops Manager Dashboard** – Active Bookings, Escalated Complaints, Approvals.

◆ Future Enhancements

- AI/ML-based property recommendations.
- Automated dynamic pricing (Airbnb-like surge pricing).
- Payment gateway integration.
- Google Maps API for property visualization.
- Mobile-first Guest Portal.

◆ Conclusion

StayEase CRM successfully replicates a real-world **Airbnb-like accommodation system** on Salesforce, while extending its functionality to cater to **students and working professionals**.

By covering **all phases from setup to automation and analytics**, the project demonstrates mastery of Salesforce Admin skills:

- **Phase 1–2** → Roles, Profiles, Security.
- **Phase 3** → Data Modeling, Relationships.
- **Phase 4** → Automation (Flows, Validation, Approvals).
- **Phase 5** → Reports, Dashboards, Analytics.

This makes StayEase CRM a **robust, business-grade CRM solution** that addresses real-world problems in property rental and tourism.