A CRM Application to Manage the Booking of Co-Living

Abstract: Our co-living space project fosters an inclusive community where individuals can live, work, and connect. The space offers a balance of private and communal areas, encouraging collaboration and reducing isolation. The application allows users to select AC rooms with multiple sharing options, choose daily special food items, make payments through various modes, and provide feedback on serviceslike room cleaning, internet connection, and food.

Features and Functionality:

1.Customer Management

a. **Customer Registration:** Users can register themselves by providing personal details such as name, email, phone number, and address.

b. **Customer Profile:** A user profile will be created to store customer information,booking history, and payment details.

2.Room Booking

c. **Room Selection:** Users can browseand select from different AC rooms with multiple sharing options (e.g., single, double, triplesharing).

d. **Room Availability:** The application will display the availability of each room type in real-time.

e. **Booking:** Users can book a room by selecting the desired room type, check- in and check-out dates, and number of occupants.

3.Food Services

f. **Food Menu:** A menu of special food items will be available for users to select from.

g. **Daily Food Selection:** Users can select food items for each day of their stay.

4. Payment Management

a. **Payment Options:**Users can make payments using various modes such as credit/debit cards, net banking, or wallets.

b. **Payment History:**A record of all payments made by a user will be stored in their profile.

5. Feedback and Review

c. **Service Feedback:**Users can provide feedback on various services such as room cleaning, internet connection, food quality,and overall experience.
d. **Rating System:**Users can rate their experience on ascale of 1-5.

6.Reporting and Analytics

e. **Booking Reports:** The application will generate reports on room bookings, occupancy rates, and revenue.
f. **Customer Insights:** The application will provide insightson customer behavior, preferences, and feedback.

7.Security and Access Control

g. **User Authentication:** Users will be authenticated using a secure login system.
h. **Role-Based Access:** Administrators will have access to manage bookings, customer data, and reports, while users will have access to their profiles and booking information.

8.Functionality

i. **Search and Filter:** Users can search for available rooms by date, room type,and sharing options.
j. **Booking Confirmation:** Once a bookingis made, the user will receive a confirmation email with details of their booking.
k. **Payment Reminders:** The application will send reminders to users for pendingpayments.
l. **Feedback Notifications:** The application will send notifications to administrators when a user provides feedback.
m. **Reporting and Analytics:** The application will generate reports and provide insights on customer behavior and preferences.

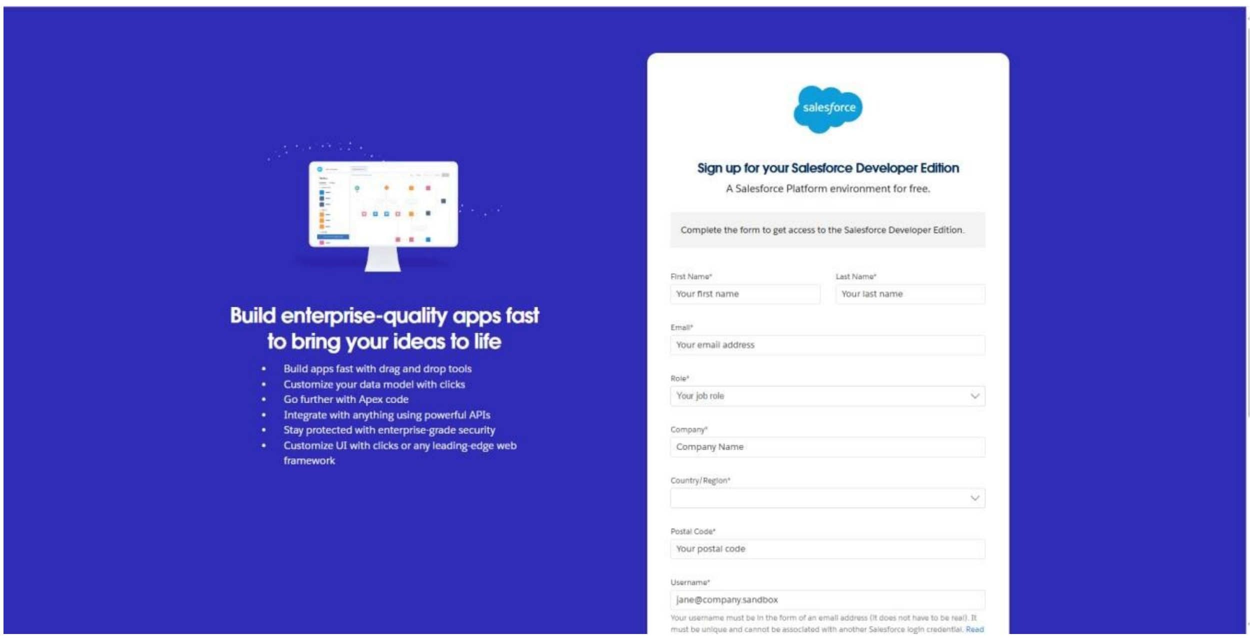
Milestone 1 - Introduction to Salesforce:

What is Salesforce?

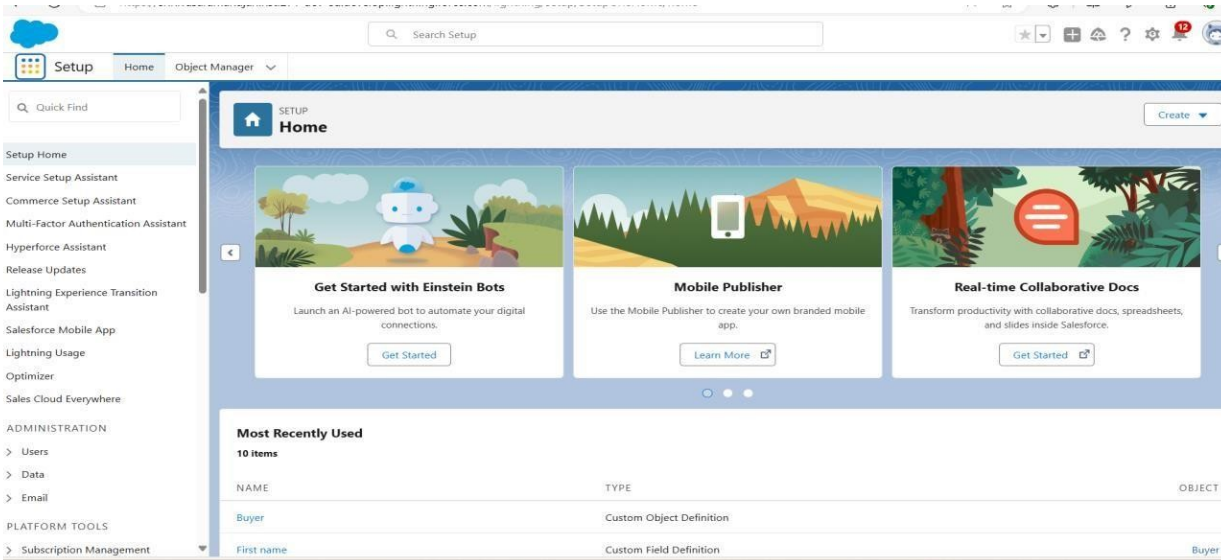
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connectwith your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engagewith employees and partners, and store your data securelyin the cloud.

Activity 1: Creating Developer Account:

https://developer.salesforce.com/signup



Activity 2:Account Activation:



Activate your account by clickingthe verify account which you received to your E-mail id**.**

Milestone 2 – Object

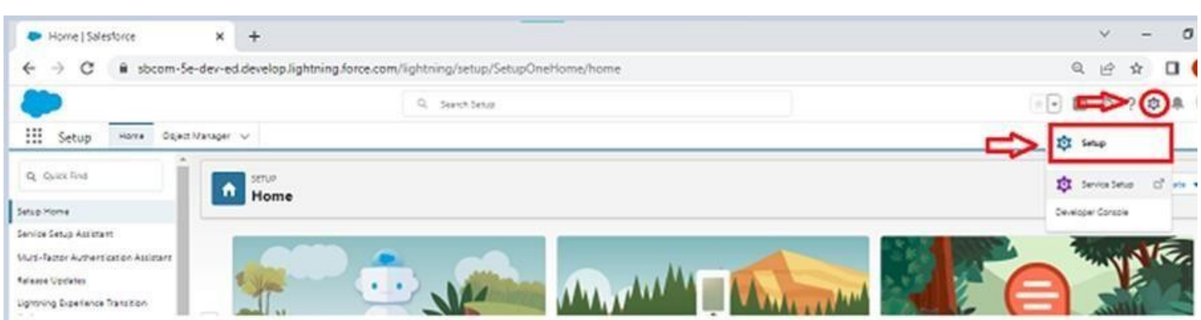
What Is an Object?

Salesforce objects are database tables that permityou to store data that is specific to an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users,contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are objects createdby users. They supply information that is unique and essential to their organization. They are the heart of any application and providea data-sharing structure.

To Navigate to Setup page:



Click on gear icon ? clicksetup..

To create an object:

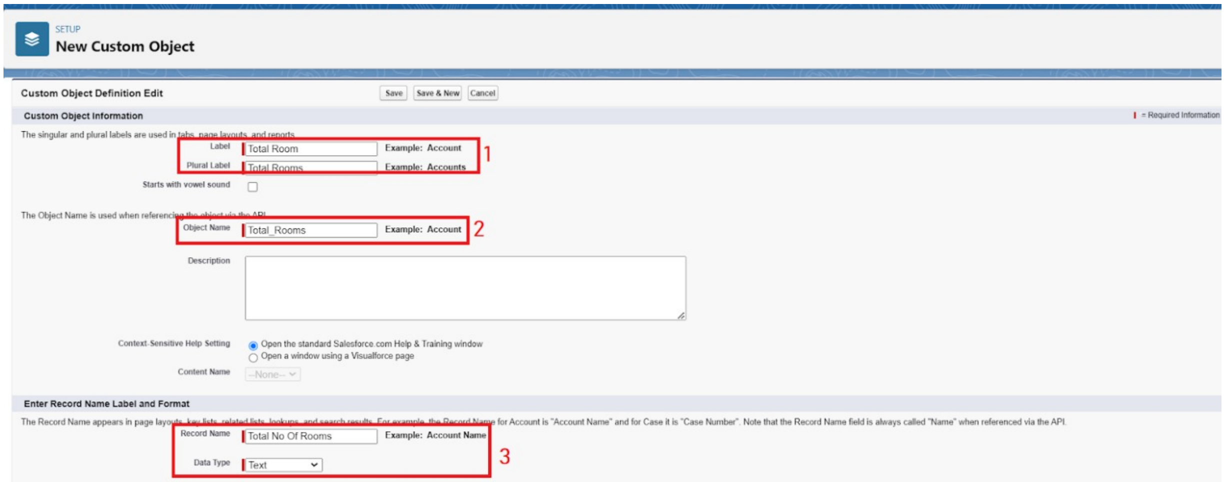
1. From the setup page ? Click on ObjectManager ? Click on Create ? Click on CustomObject.

2. On the Custom object defining page:
3. Enter the labelname, and plural label name, click on Allow reports, and Allow search.
4. Click on Save.

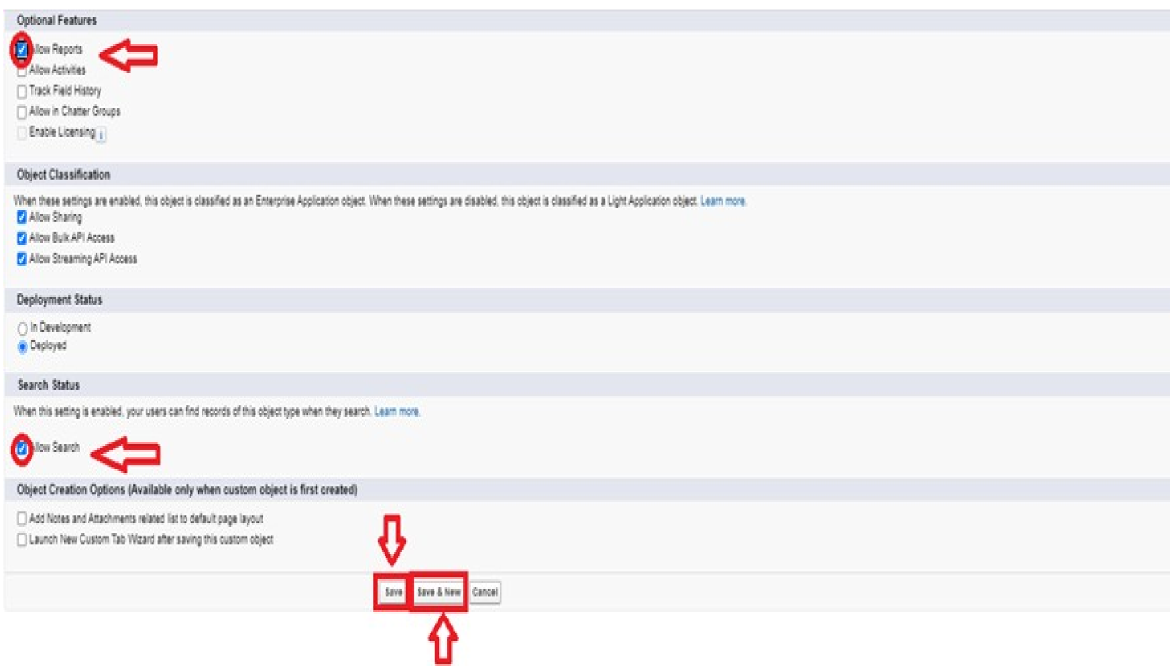
Activity 1: Create a custom objectfor Total Rooms

To create an object:

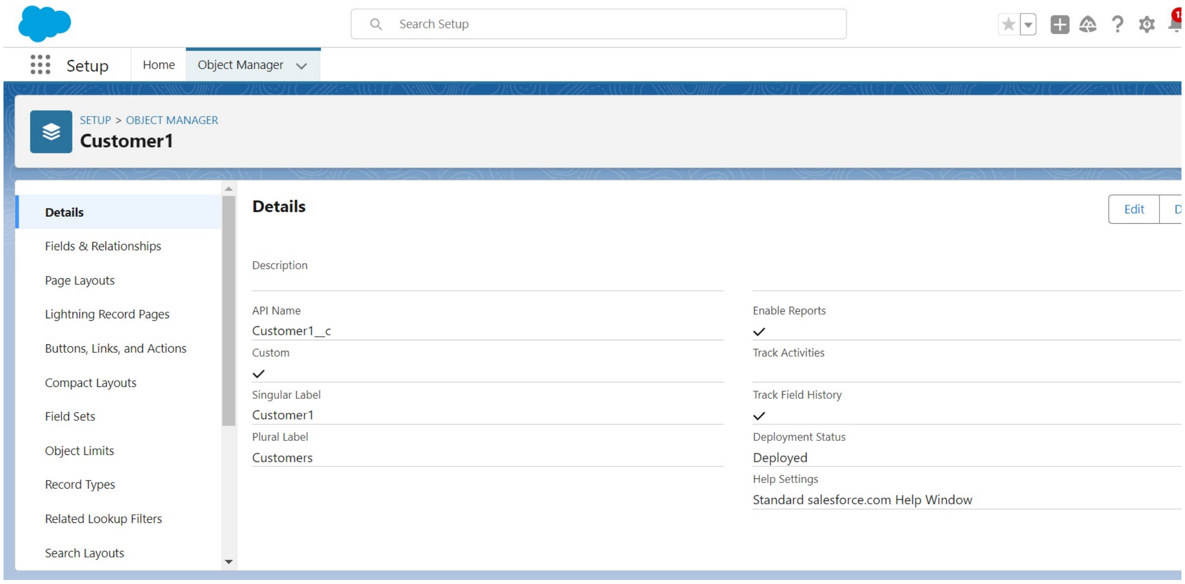
a. From the setup page Click on Object Manager Click on Create Click on Custom Object.1.Enter the label name Supplier
b. Plural label name? Suppliers
c. Fill in the labelas " TotalRoom ".
d. Fill in the plural labelas " TotalRooms ".
e. Record name: "Total No Of Rooms"
f. Select the data type as "Text".
g. Inthe Optional Featuressection, select Allow Reports and Track Field History.
h. In the Deployment Status section, ensure Deployed is selected.
i. In the Search Status section, select Allow Search.
j. In the Object CreationOptions section, selectAdd Notes and Attachments relatedlistto default pagelayout.



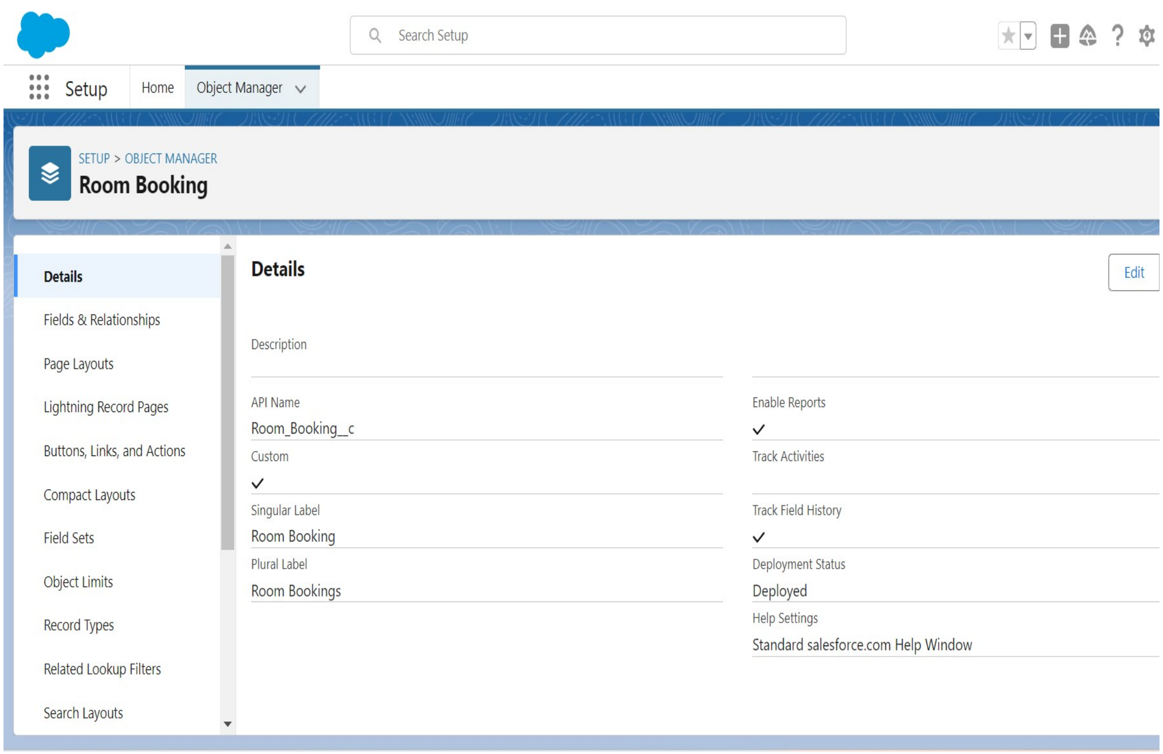
k. Leave everything else as is, and clickSave.



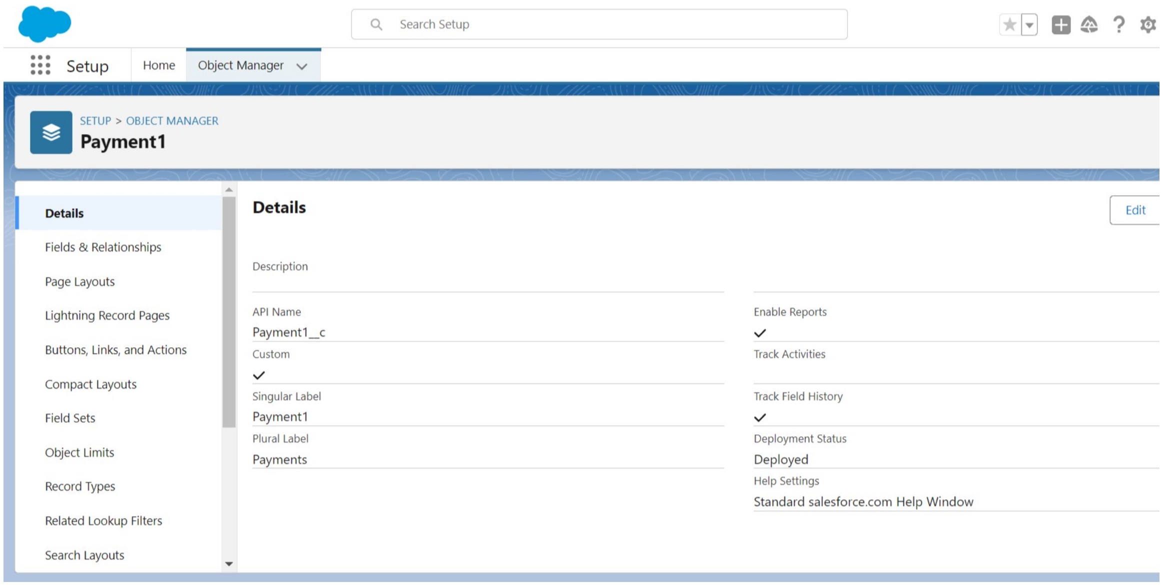
Create a custom object for Customer



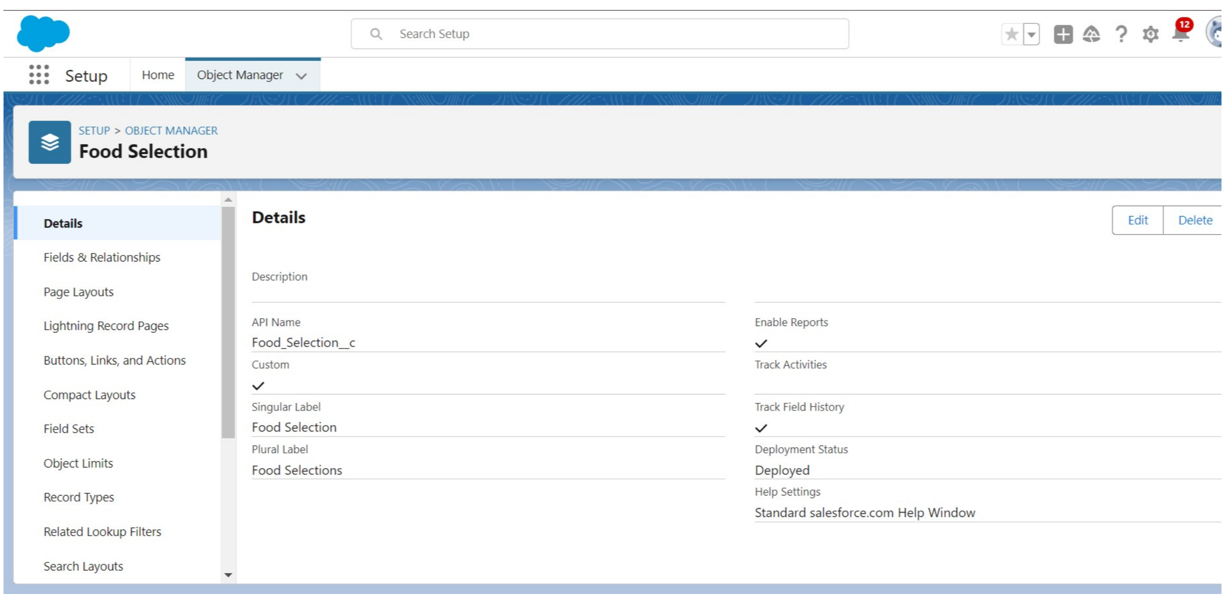
Create a custom object for Room Booking



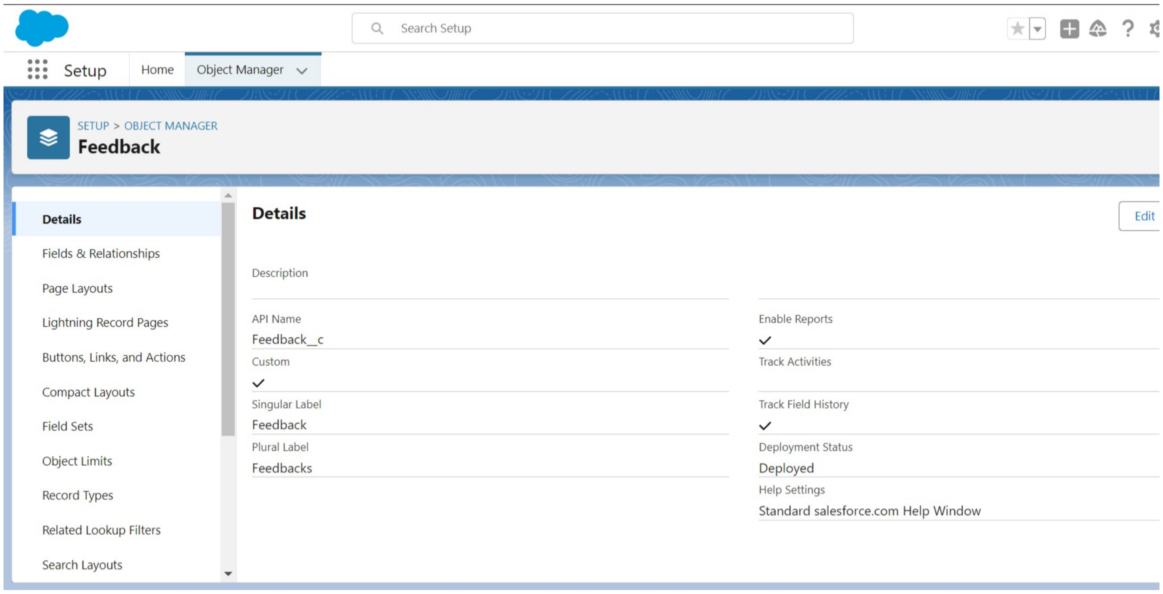
Create a custom object for Payment



Create a custom object for Food Selection



Create a custom object for Feedback



Milestone 3 - Tabs

What is Tab : A tab is like a user interface that is used to build recordsfor objects and to view the record

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 easierfor your users to quicklyaccess content and applications they frequently use without leaving the salesforce.com application.

3. **Visualforce Tabs :**

   Visualforce Tabs are custom tabs that displaya Visualforce page.Visualforce tabs look and behavelike 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.

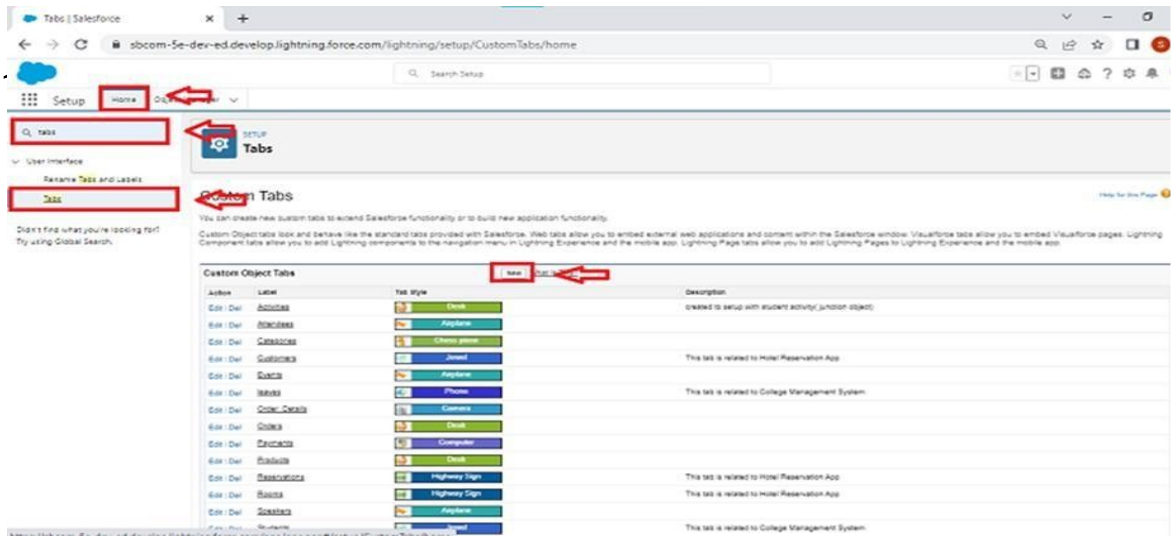
5. **Lightning Page Tabs :**

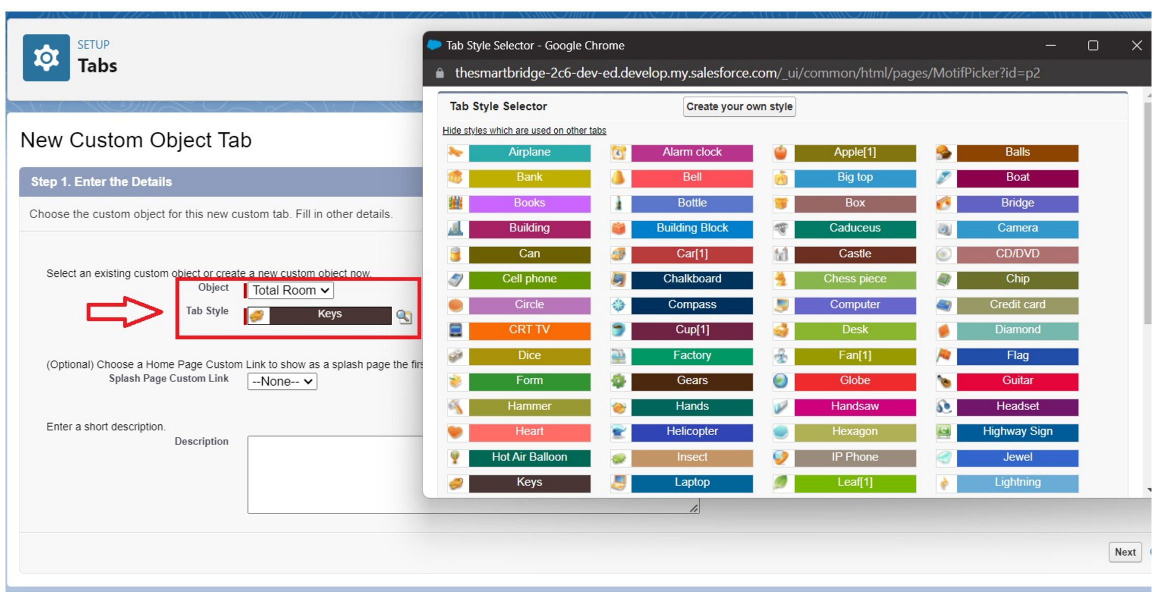
   Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

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 RoomsTo createa Tab:(Total Rooms)

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





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

3. Next (Add to profilespage) keep it as default

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

Milestone 4 - The LightningApp

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightningapps give your users access to sets of objects,tabs, and other items all inone convenient bundle in the navigation bar.

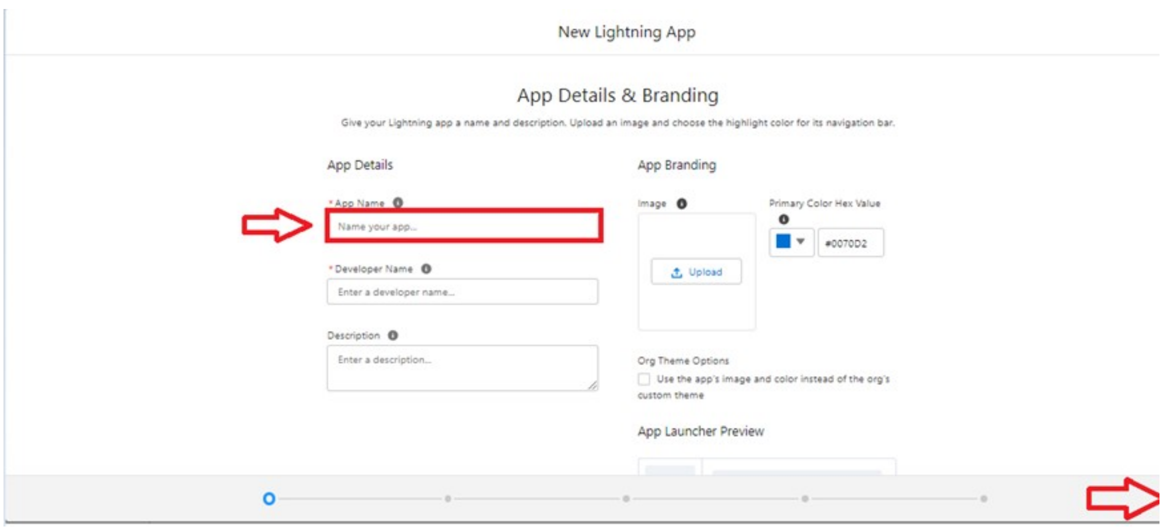
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Activity 1: To create a lightning app page:

Go to setup page > search“app manager” in quickfind > select “app manager” >
click on Newlightning App.

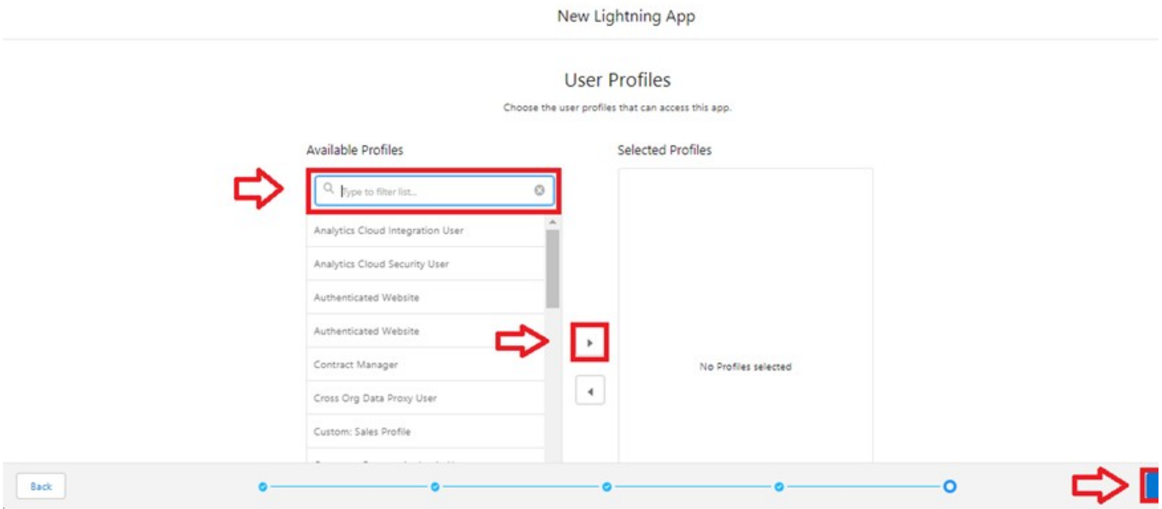
1. Fill the app name in app details and branding > Next > (App option page)keep it as default> Next

> (Utility Items)keep it as default> Next.



2. 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.

3. To Add UserProfiles:



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

Milestone 5 – Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuableinformation that you require for a specificobject. Hence, the overall searching, deletion, and editing of the records becomesimpler and quicker.

Types of Fields

Standard Fields

Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simplydelete a StandardField until it is a nonrequired standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find commonin every Salesforce application. They are,

? Created By

? Owner

? Last Modified

? Field Made During object Creatio

Custom Fields:

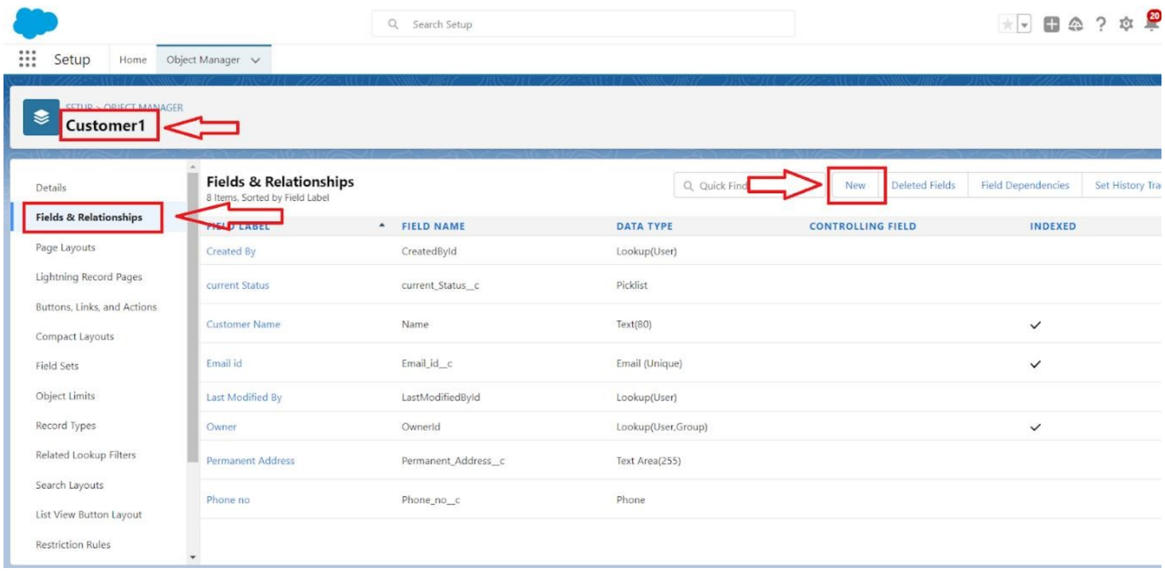
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision dependson the user, and he can add/remove CustomFields of any given form.

Activity 1: Creationof fields for the customer1 object

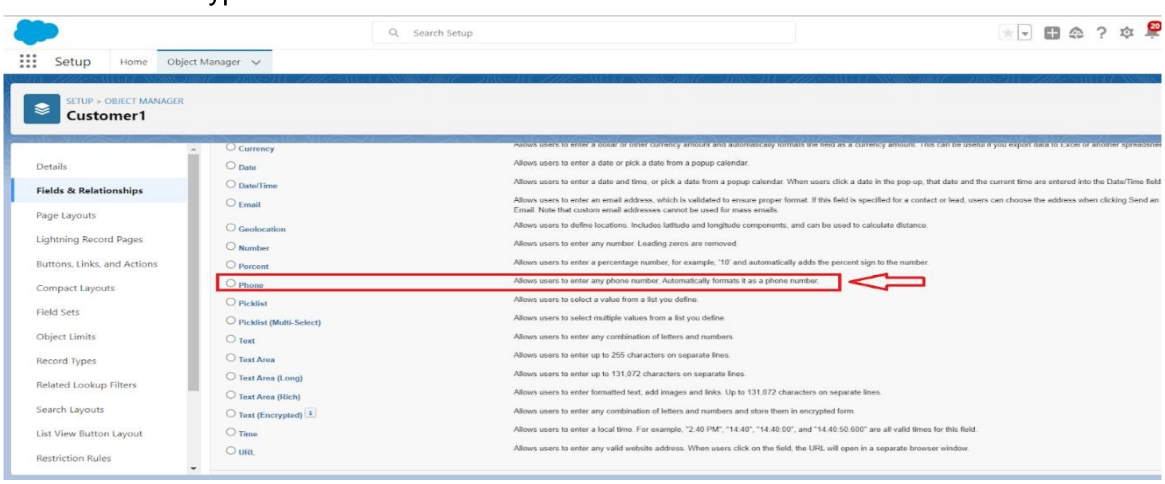
1. To create fieldsin an object:

Go to setup > click on Object Manager> type object name(Customer1) in search bar > clickon the object.

Now click on “Fields& Relationships” > New



3. Select Data Type as a “Phone”



4. Click on next

To create anotherfields in an object:

1. Go to setup > click on Object Manager> type objectname(Customer1) in searchbar >clickon the object.
2. Now click on “Fields &Relationships” ? New
3. Select Data type as a “Text Area” and Click on Next
4. Fillthe Above as following:

a. Field Label: PermanentAddress

b. Field Name : It’s gets auto generated

c. Click on Next > Next > Save and new.

1. **To Create a Fields & Relationship to an Object**

1. Go to setup > click on Object Manager> type objectname(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 Relatedto drop down and Select the “Total Rooms” objectand click on Next

- Fillthe Above as following:
- Change the FieldLabel: Total No Of Rooms
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new.

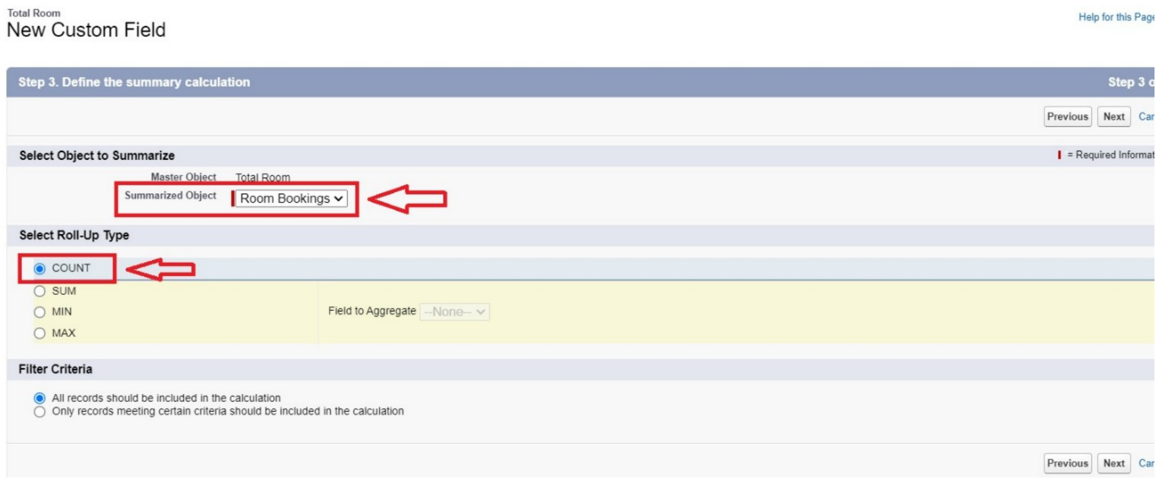
7. To Createa Rollup SummaryField in “TotalRoom Object”

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 > clickon the object.
3. Now click on “Fields& Relationships” ? New
4. Select Data type as a“Roll-up Summary” and Click on Next

- Fillthe Above as following:
- Field Label: Rooms Booked
- Field Name :It’s gets auto generated
- Click on Next

5. Select the Room Bookingsin the Summarized Object

1. Select the count Radio button in the selectRoll-up Type

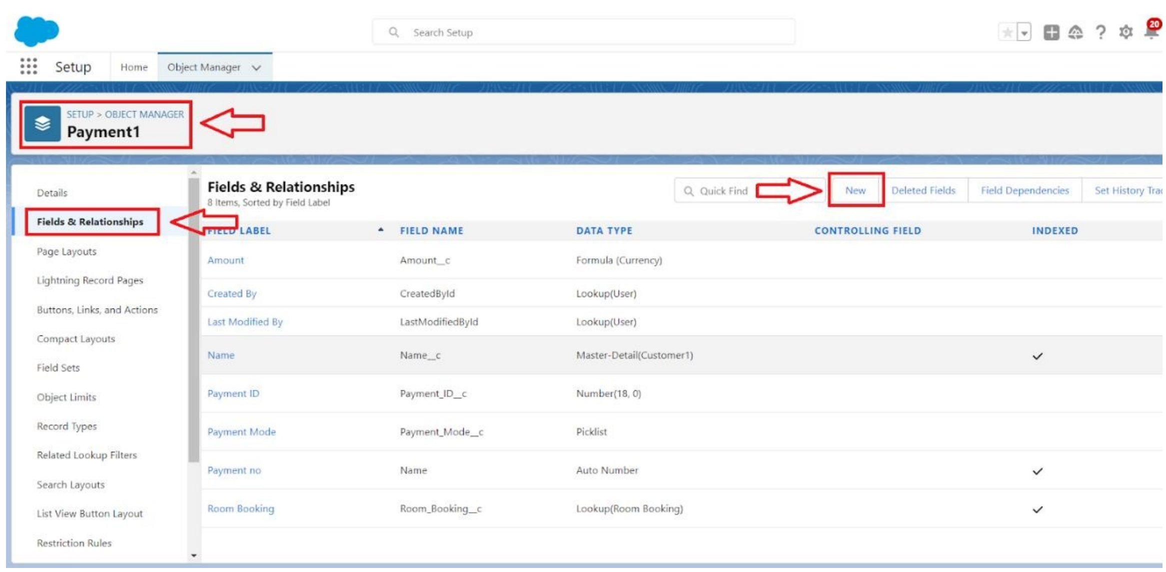


2. Click on Next > Next > Save and new

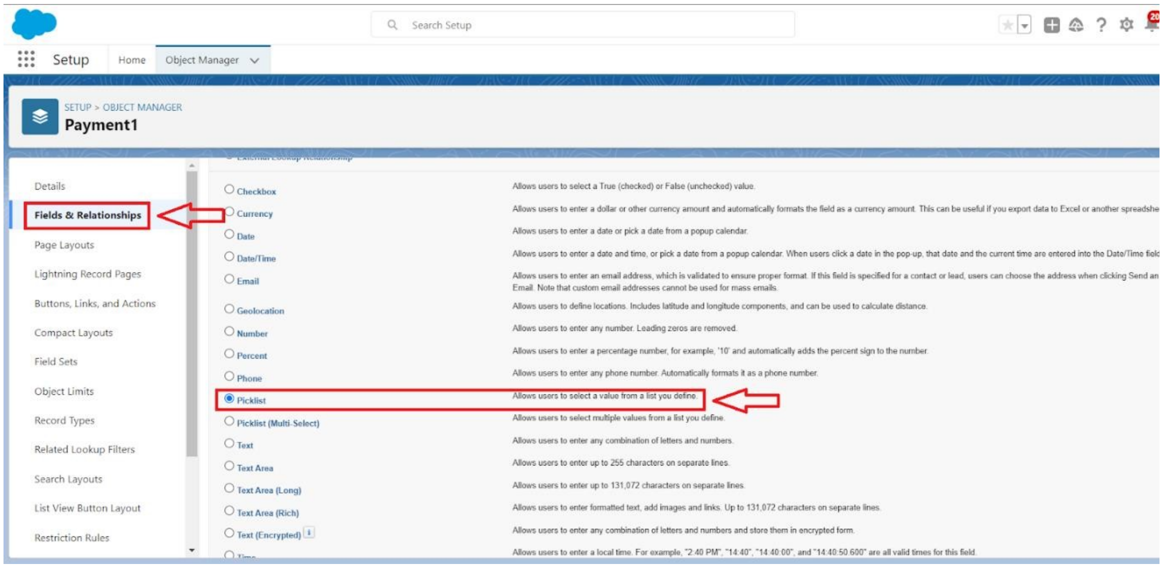
Creation of another fields for the Payment1 object

To create fieldsin an object:

1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on theobject.
2. Now click on “Fields& Relationships” > New



3. Select Data Type as a “Picklist”



1. **To createfields in an object:**

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > clickon the object.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill theAbove as following:

- Field Label: Select Lunch
- Under Value - Entervalues, with each value separatedby a new line

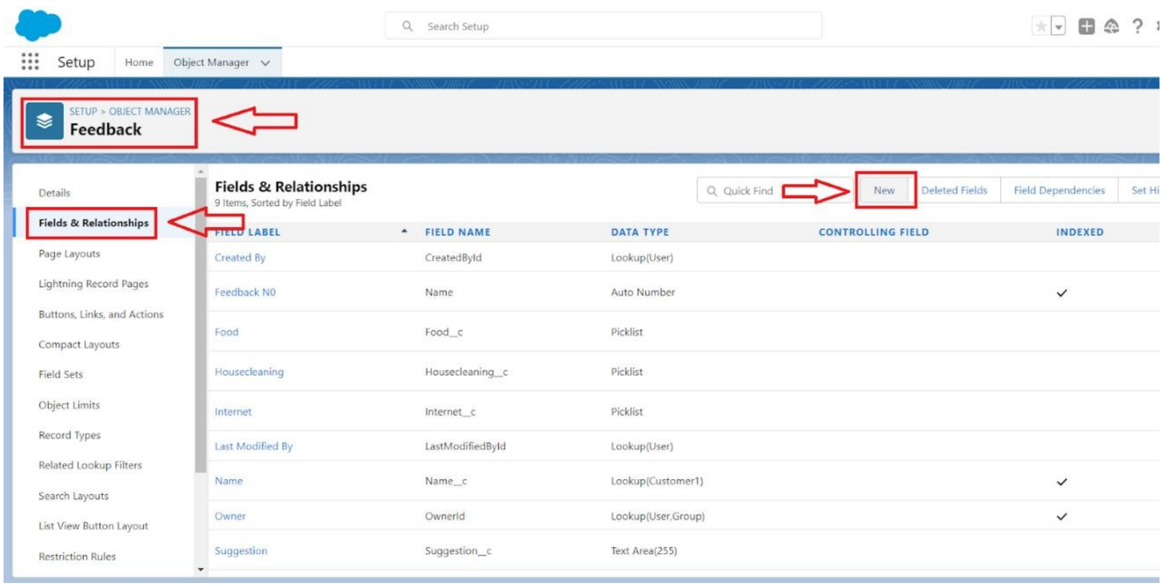
1. Meals
2. Chicken biryani
3. Vegbiryani
4. Vegfried rice
5. Eggfried rice
6. Chicken fried rice
7. Curdrice
8. Tomato rice
9. Eggnoodles
10. Chicken Noodles
11. Bhagara rice

- Select Checkbox Use Firstvalue as defaultValue
- Click on Next > Next > Save and new.

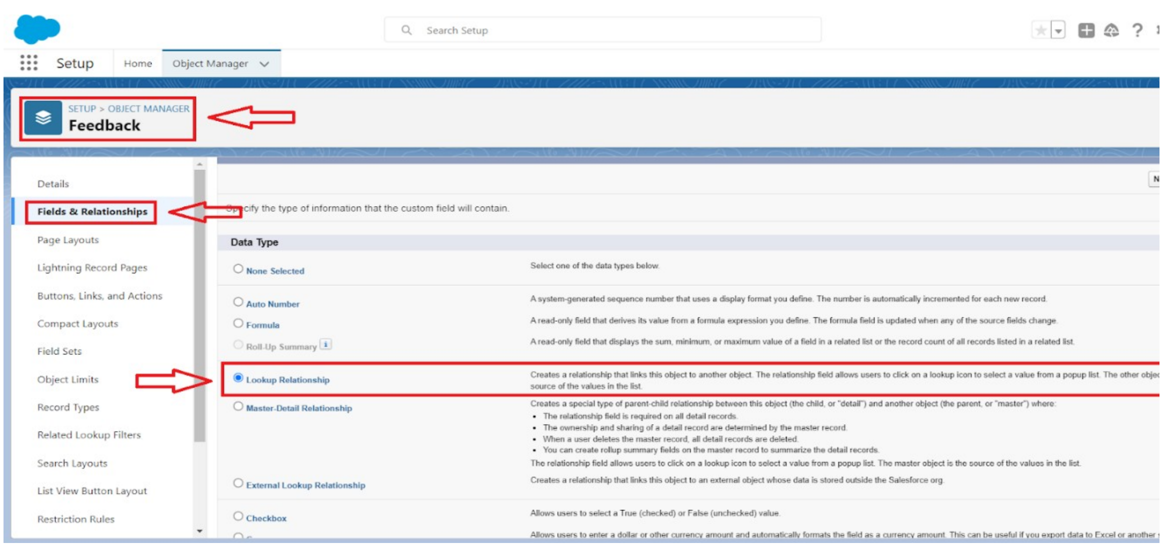
Creation of fieldsfor the Feedback object

1. createfields & relationship to an object:

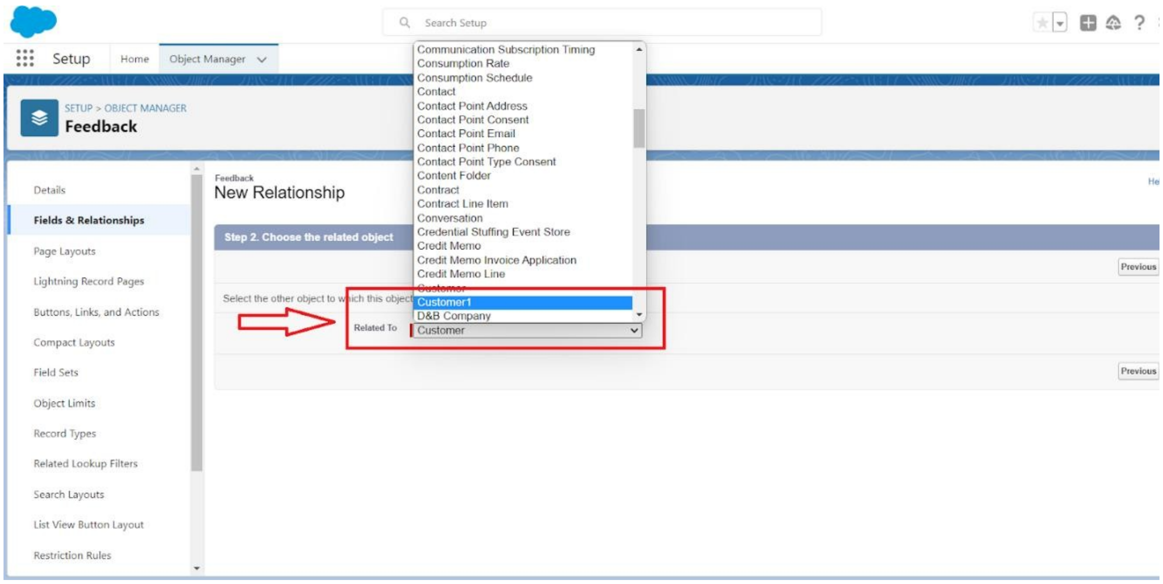
1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on theobject.
2. Now click on “Fields& Relationships” > New



3. Select Data Type as a “LookupRelationship”
4. Clickon Next

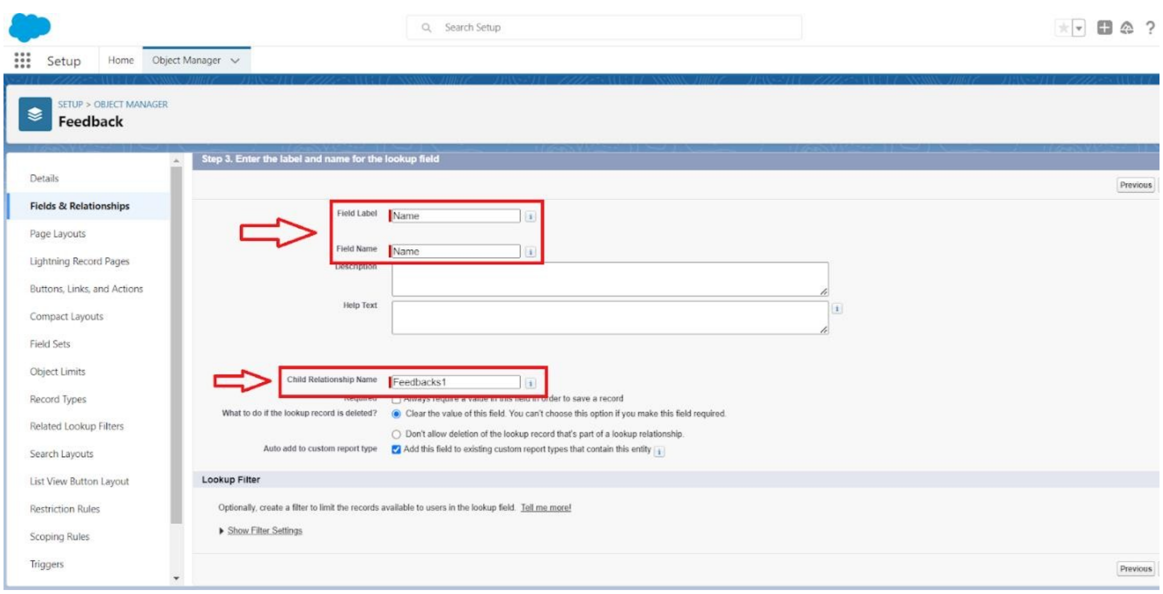


5. Clickon the Related to drop down and Select the Customer1 objectand click on Next



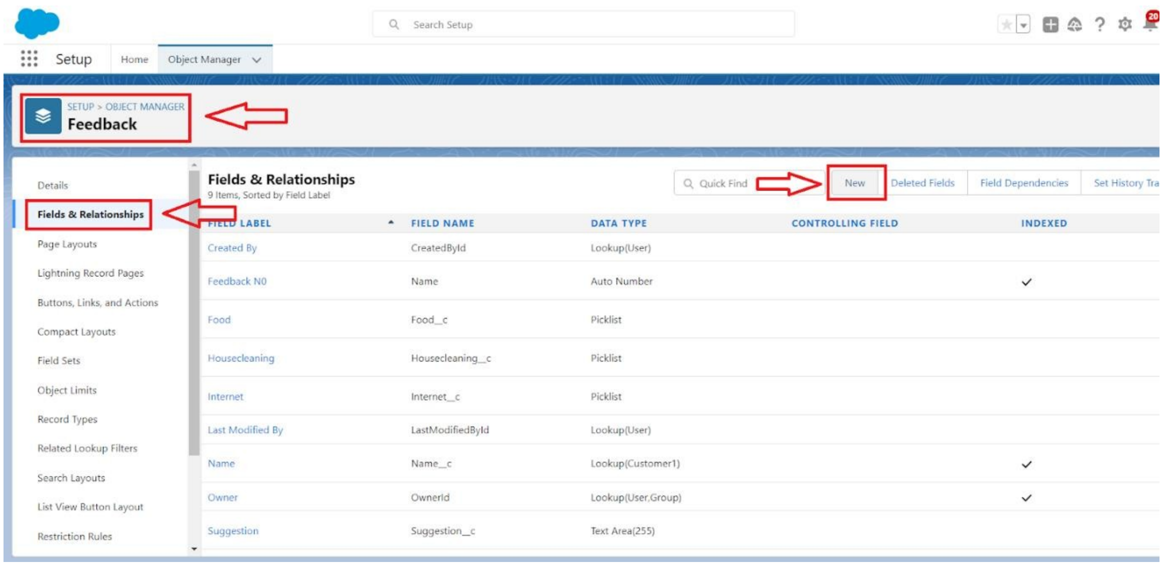
6. Fill theAbove as following:

- Change the Field Label:Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.



2. To create Anotherfields in an Same object:

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on theobject.
2. Now click on "Fields& Relationships" > New

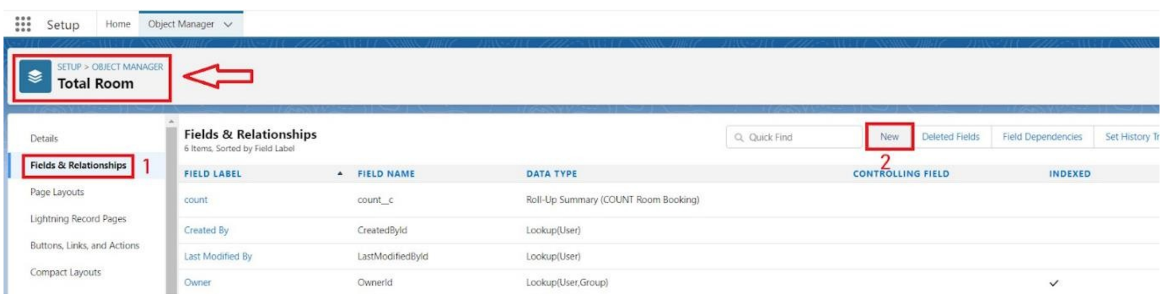


1. Select Data Type as a “Picklist”
2. Clickon Next

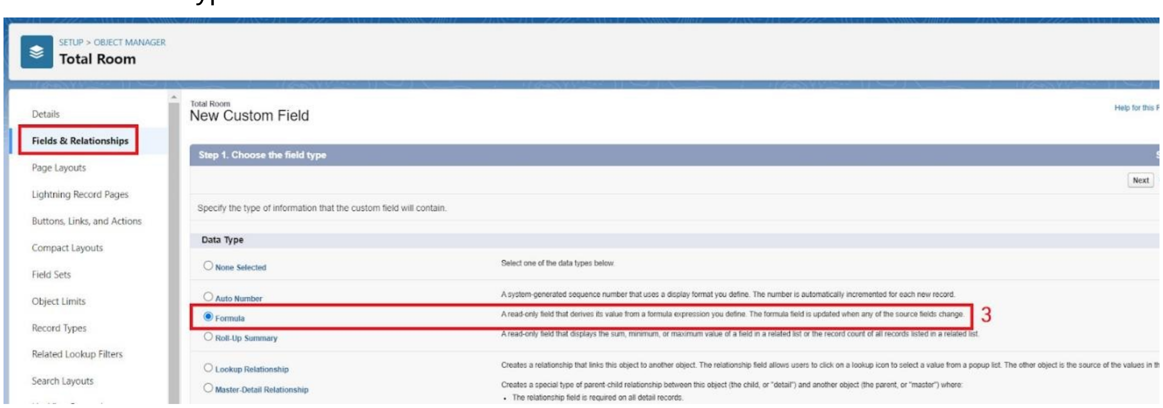
Creation of fieldsfor the Total Rooms object

1. To create fieldsin an object:

1. Go to setup> click on Object Manager> type objectname(Total Rooms) in search bar > click on theobject.
2. Now click on “Fields& Relationships” > New

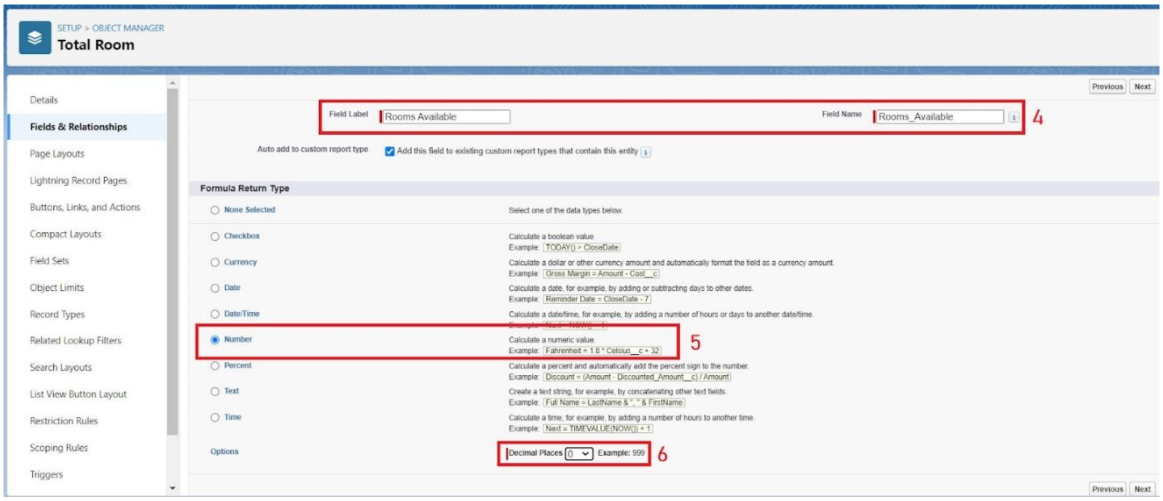


3. Select Data type as a “Formula”and Click on Next



4. Fill theAbove as following:
5. Field Label: RoomsAvailable
6. Field Name : It’s gets auto generated

7. Select the Formula ReturnType as “Number”
8. Select the Decimal placesas “0” and Click on Next



Note: I am Considering “Total No Of Rooms = 30” While creating a new record in Total Rooms Object.

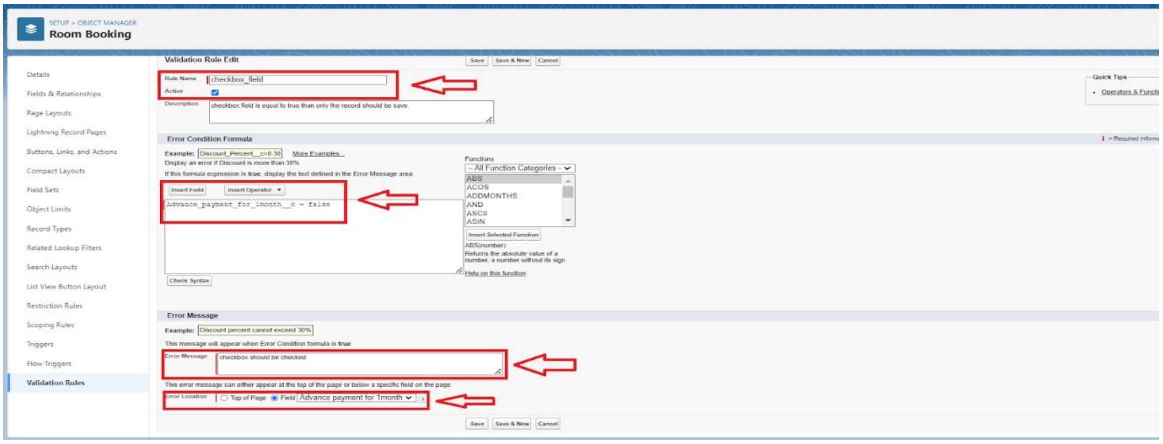
9. Click on the AdvancedFormula “ 30 - Rooms_Booked__c ” and Check Syntax
10. Clickon Next > Next > Save and new.

Validation rule

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria.If the criteria are not met, the validation rule triggers an error messageand preventsthe user from saving the record until the issues are resolved.

create a validation rule to an Room BookingObject

1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.
2. Now click on “Validation rule” at top > New.
3. EnterRulename “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 forsyntax error.
5. Enter the error message“Checkbox should be checked”
6. Select error locationas field(Advance paymentfor 1month)



7. Click on save.

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 profilesin salesforce

1. **Standard profiles:**

By default salesforce providesbelow standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standardones

Each of these standardones includes a default set ofpermissions for all of the standard objects available on theplatform.

2. **Custom Profiles:**

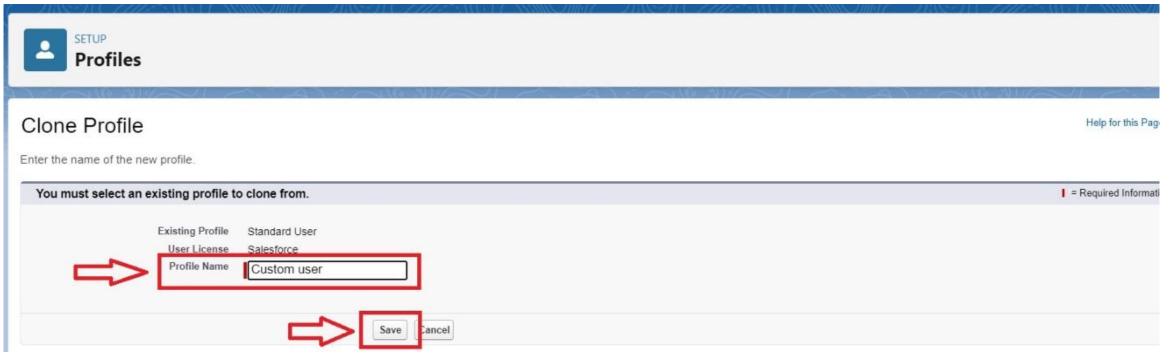
Custom ones defined by us.

They can be deletedif there are no usersassigned with that particular one.

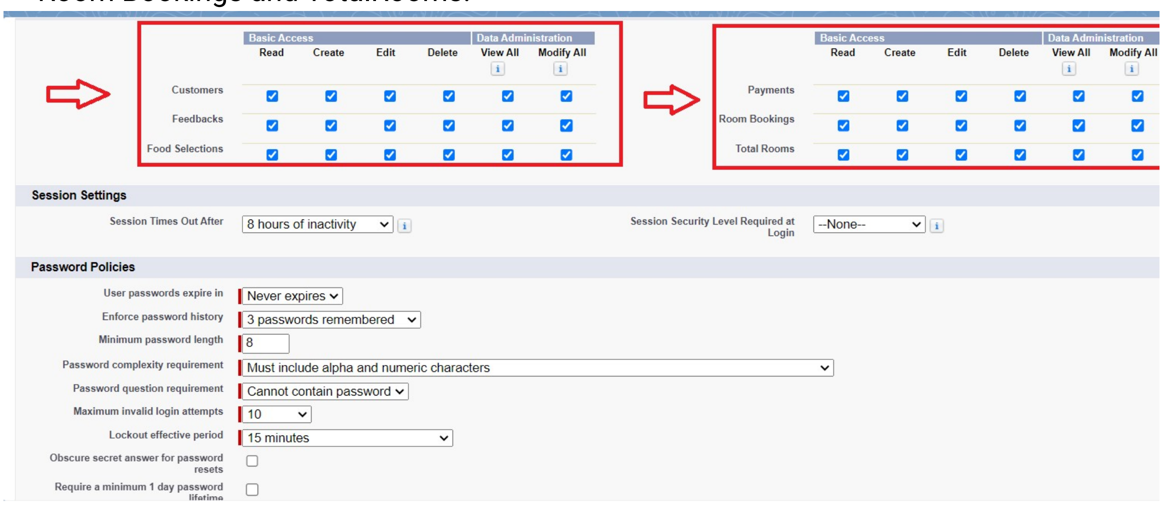
Custom user Profile

To create a new profile:

1. Go to setup > type profilesin quick find box> click on profiles > clone the desired profile(Standard User)
2. Enter profile name (Custom User)> Save.



3. While still on the profilepage, then clickEdit.
4. Scroll down to Custom Object Permissions and Give All access permissions for Customers,Feedbacks, Food selections, Payments, Room Bookings and TotalRooms.



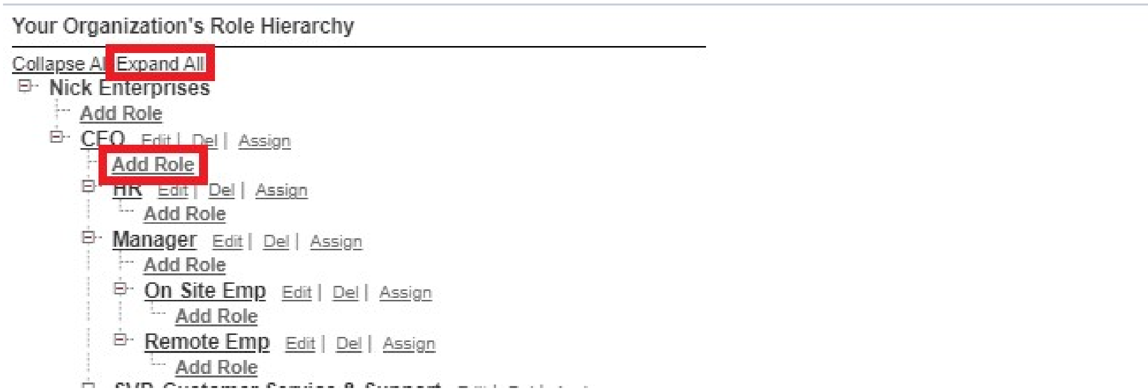
5. Scroll down and Clickon Save.

Roles

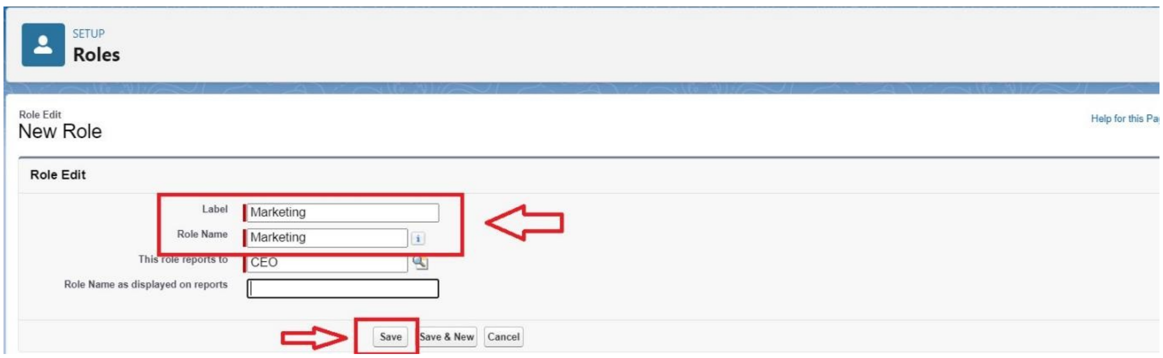
A role in Salesforce definesa user's visibility access at the record level.Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Marketing Role

1.Go to quick find > Search for Roles > click on set up roles.2.Click on Expand All and clickon add role under CEO role.



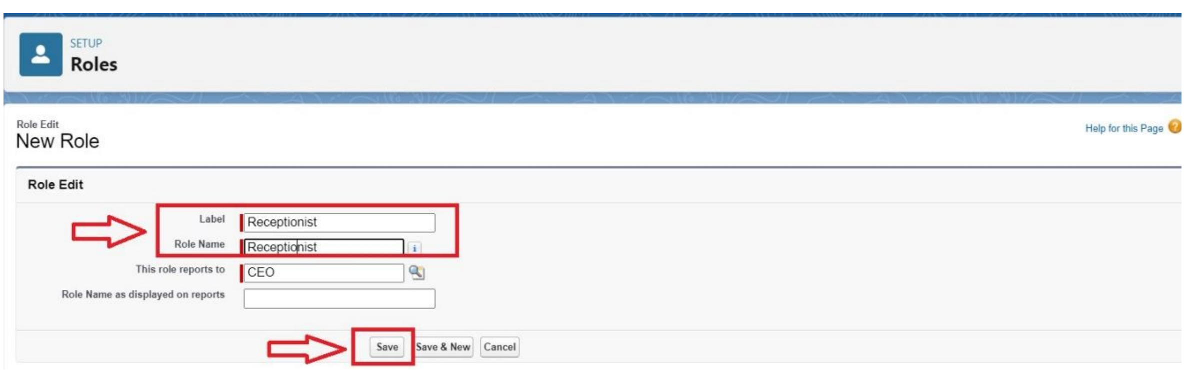
1. Give Label as "Marketing" and Role name gets auto populated.



2. 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. GiveLabel as "Receptionist" and Role name gets auto populated.



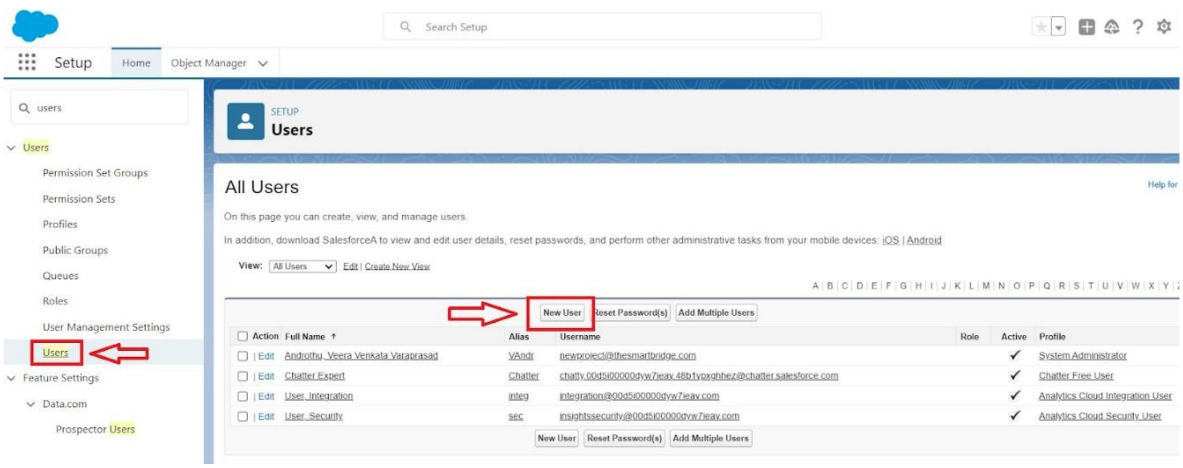
4. Then click on Save.

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.

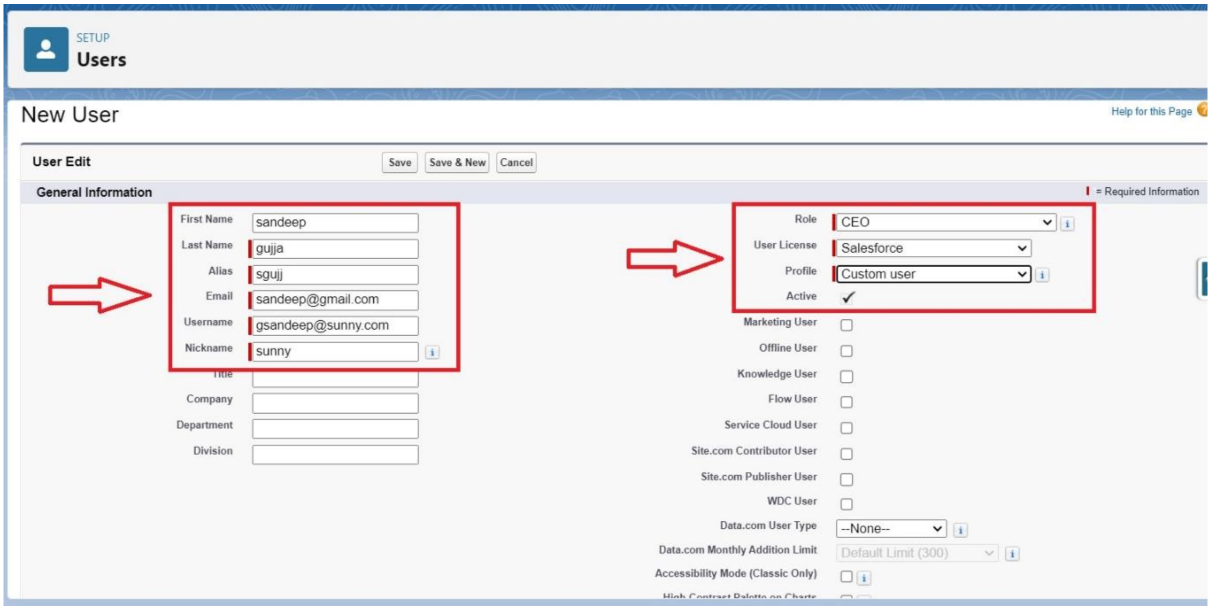
Create User

1. Go to setup > type users in quickfind box > select users> click New user.



2. Fill in the fields

   a. First Name : sandeep
   b. Last Name : gujja
   c. Alias : Give a Alias Name
   d. Email id : Giveyour Personal Email id
   e. Username : Username should bein this form: text@text.com
   f. Nick Name : Give a Nickname
   g. Role : CEO
   h. User licence : Salesforce
   i. Profiles : Customuser



3. save..

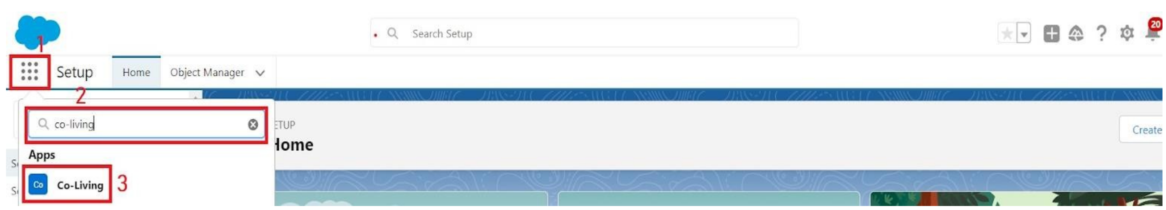
User Adoption

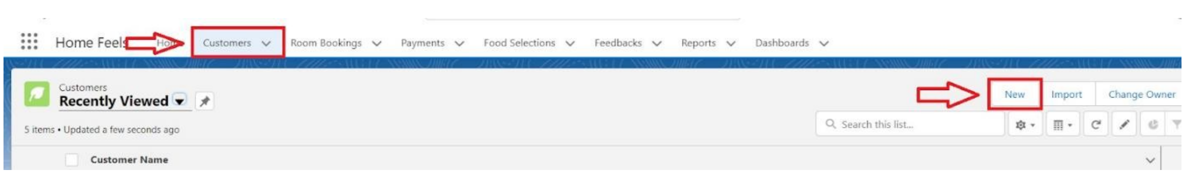
Create a Record (Customers)

1.Click on App Launcheron the left side of

the screen.2.Search Home Feels & click on

it.

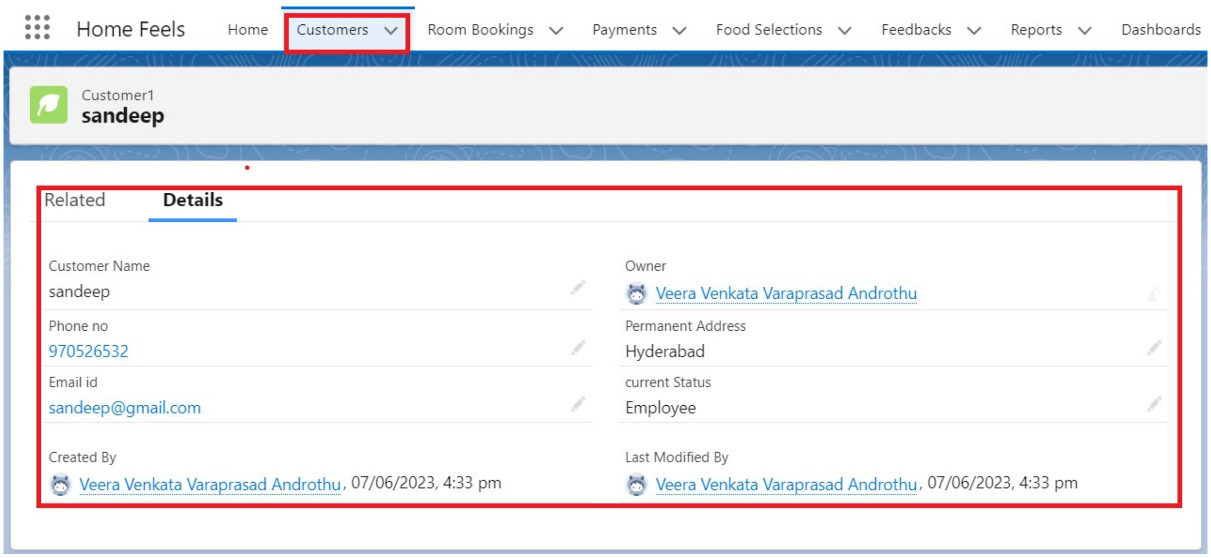




3.Click on the Customers Tab. 4.Click new and fill details & Save **View a**

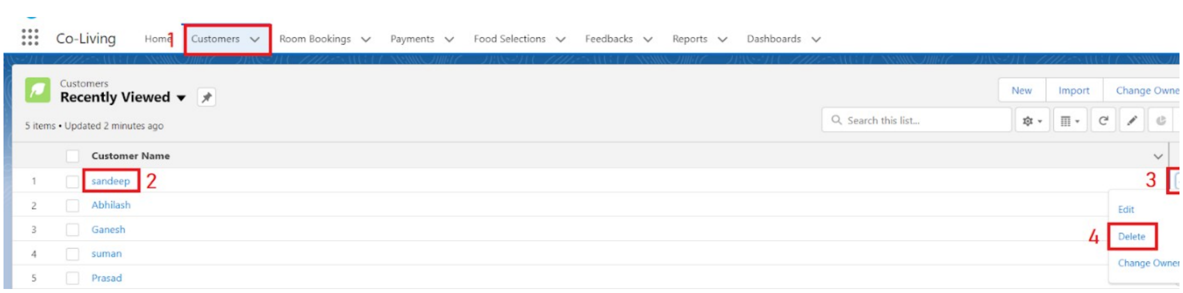
Record(Customers)

1. Click on App Launcher on theleft side of the screen.
2. Search Home Feels & click on it.
3. Click on CustomerTab.
4. Click on any record name. you can see the details of the Customer.



Delete a Record (Customers)

1. Click on App Launcher on theleft 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 deleteagain.



Reports

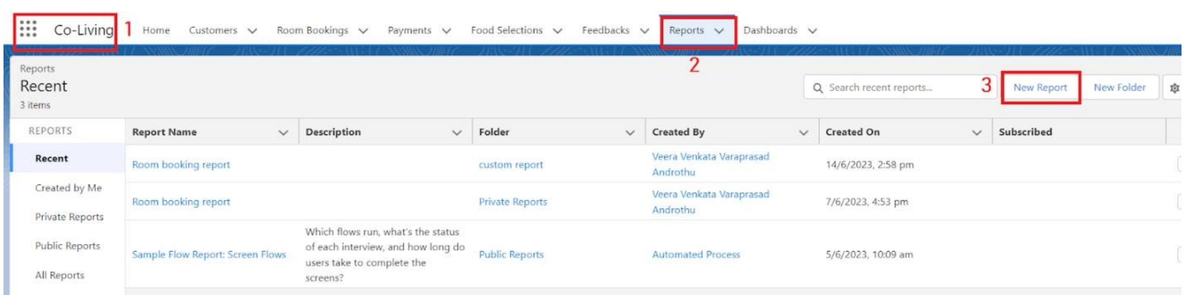
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, displayit in easy-to-understand formats, and share the resulting insightswith others. Beforebuilding, reading, and sharing reports, review these reporting basics. Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Create Report

1. Go to the app >click on the reports tab

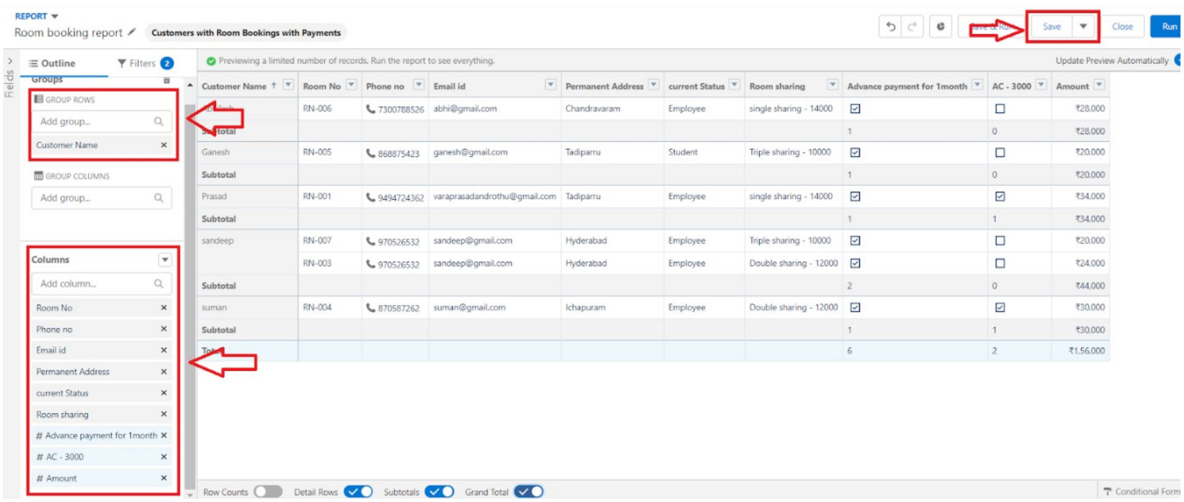
2. Click New Report.



3. Select report type from category or from report type panel or from search panel “Customers withRoom Bookings with Total Rooms ” > clickon start report.

4. Customize your report

5. Add fields from left pane as shown below.



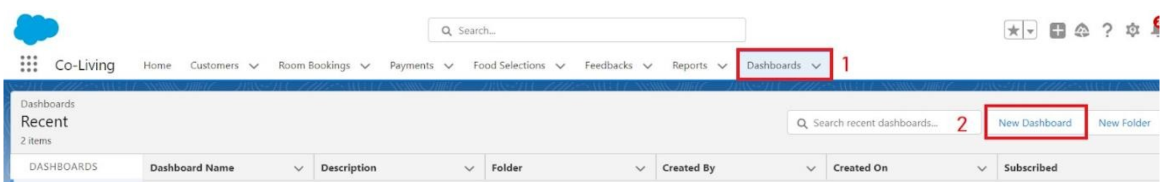
6. Save or run it.

Dashboards

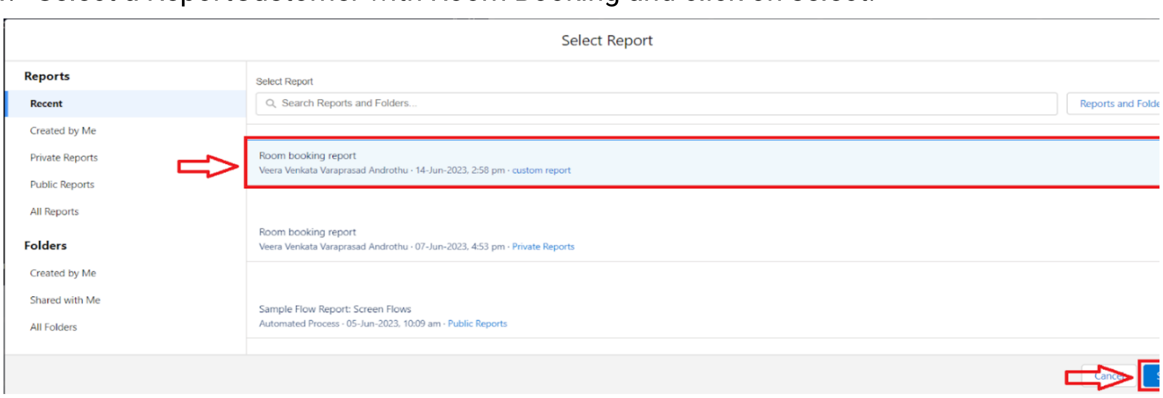
Dashboards help you visually understand changing business conditions so you can make decisionsbased on the real-time data you've gatheredwith reports. Use dashboards to help users identify trends,sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, reviewthese dashboard basics.

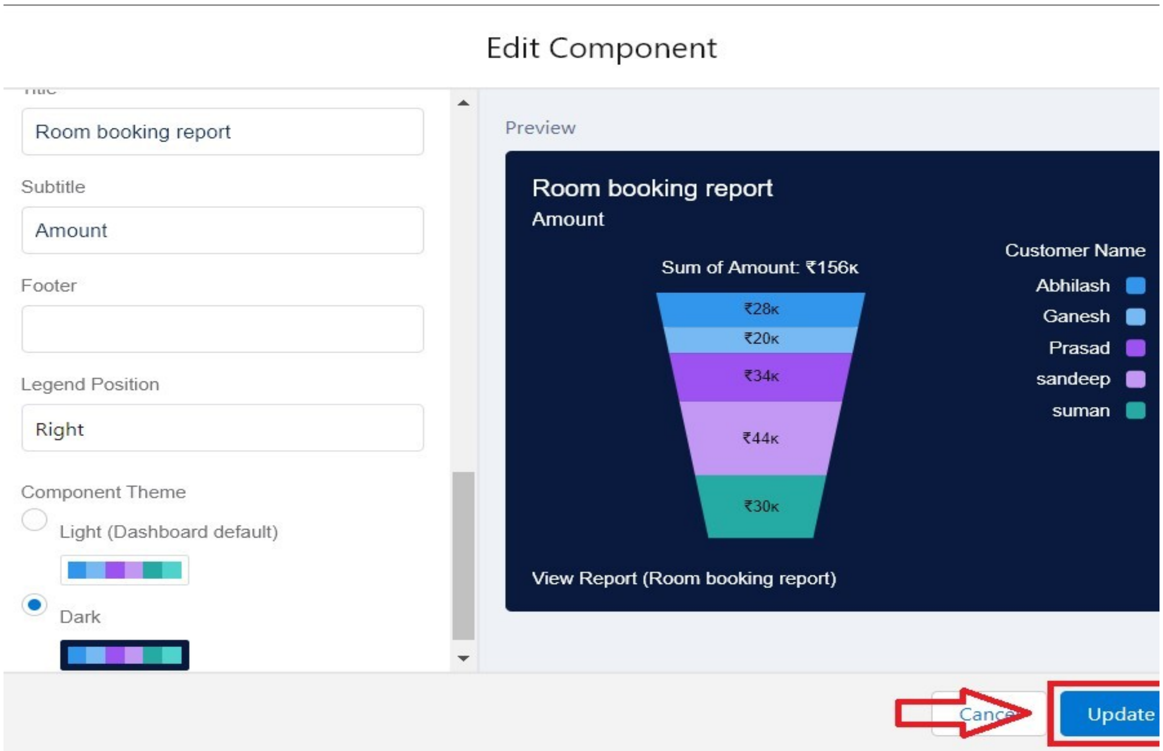
Create Dashboard

1. Go to the app > click on the Dashboardtabs and click on new Dashboard



2. Give a Name and click on Create.
3. Select add component.
4. Select a ReportCustomer with Room Booking and click on select.





1. Click Add then click on Save and then click on Done.

Flows

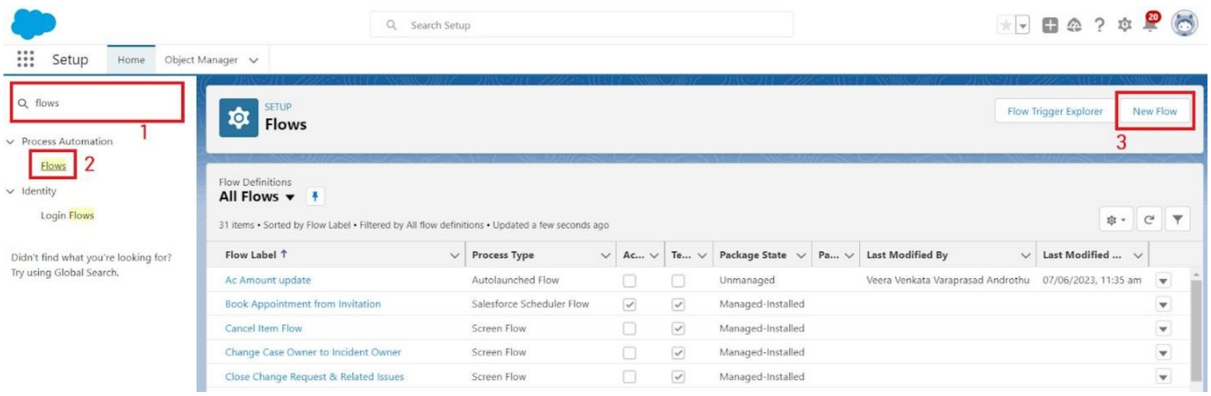
In Salesforce, a flow is a powerfultool that allowsyou to automate business processes, collect and updatedata, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Why do we need to create a flow:

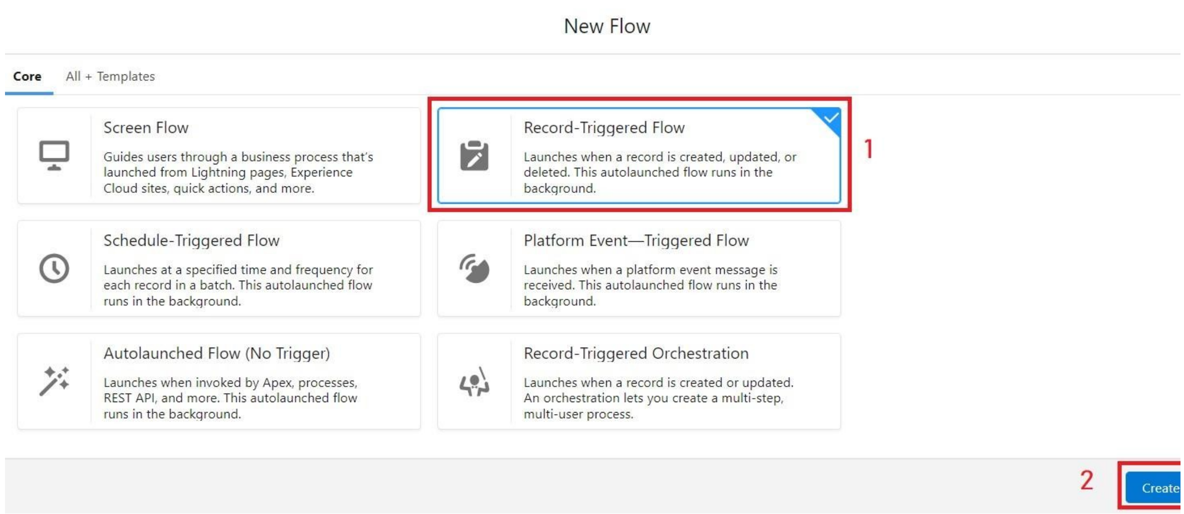
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

Create a Flow

1. Go to setup > type Flowin quick find box >Click on the Flow and Select the New Flow.



2. Select the Record-triggered flow andClick on Create.



3. Select the Object as a Room Booking

   in the Drop down list. 4.Select the

   TriggerFlow when: “A record is Created

   or Updated”.

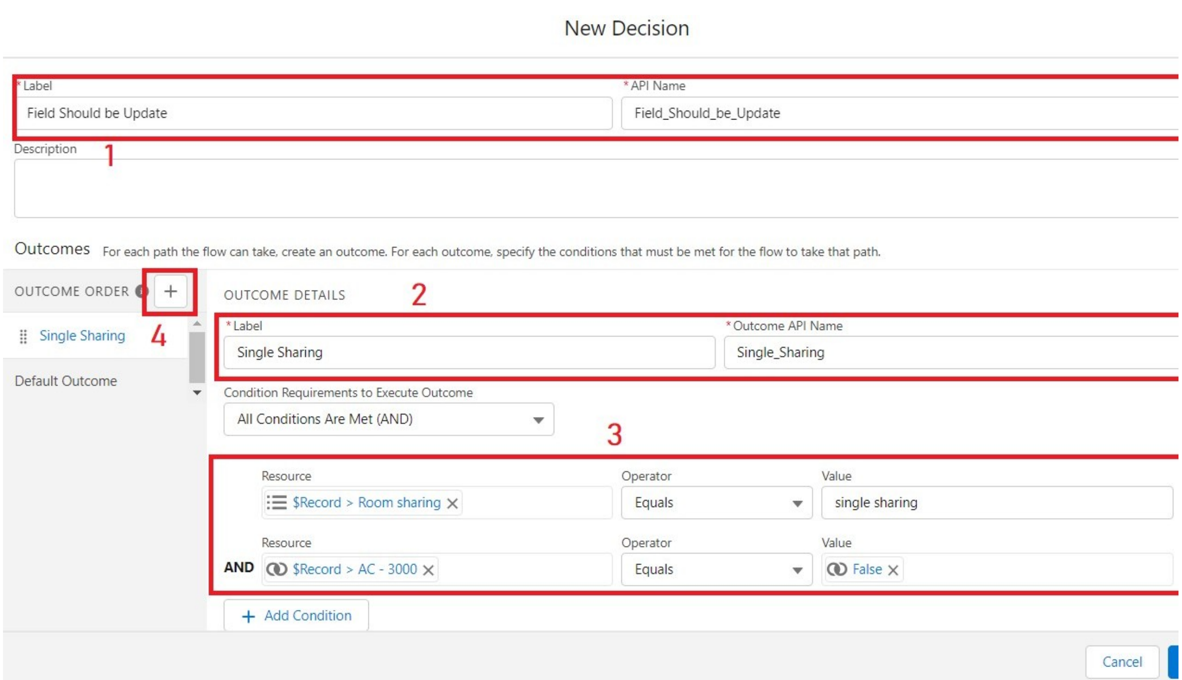
1. Select the Optimize the flow for: “Actions and Related Records”and Click on Done.

2. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down
   List select the “DecisionElement”.

3. Enter the Details Label:Field should be Update,API name: Gets Automatically Generated.

4. Enter the Outcome DetailsLabel: Single sharing,Outcome API name: Gets Automatically Generated.

    a. Resource: Select Record.Room sharing.
    - Operator: Select Equals.
    - Value: Select Singlesharing.
    - Click on “Add Condition”
    - Resource: Select Record.AC-3000.
    - Operator: Select Equals.
    - Value: Select False.
    - Click on “+” Symbol In the OutcomeOrder.



- Enter the Outcome DetailsLabel: Double sharing,Outcome API name: Gets Automatically Generated.

    - Resource: Select Record.Room sharing.

    - Operator: Select Equals.
    - Value: Select Doublesharing.
    - Click on “Add Condition”
    - Resource: Select Record.AC-3000.
    - Operator: Select Equals.
    - Value: Select False.
    - Click on “+” Symbol In the OutcomeOrder.

- Enter the Outcome Details Label: Triple sharing, Outcome API name: Gets AutomaticallyGenerated.

    - Resource: Select Record.Room sharing.
    - Operator: Select Equals.
    - Value: Select Triplesharing.
    - Click on “Add Condition”
    - Resource: Select Record.AC-3000.
    - Operator: Select Equals.
    - Value: Select False.
    - Click on “+” Symbol In the OutcomeOrder.

- Enter the Outcome Details Label: Single Ac, Outcome API name: Gets Automatically Generated.

    - Resource: Select Record.Room sharing.
    - Operator: Select Equals.
    - Value: Select Singlesharing.
    - Click on “Add Condition”
    - Resource: Select Record.AC-3000.
    - Operator: Select Equals.
    - Value: Select True.
    - Click on “+” Symbol In the OutcomeOrder.

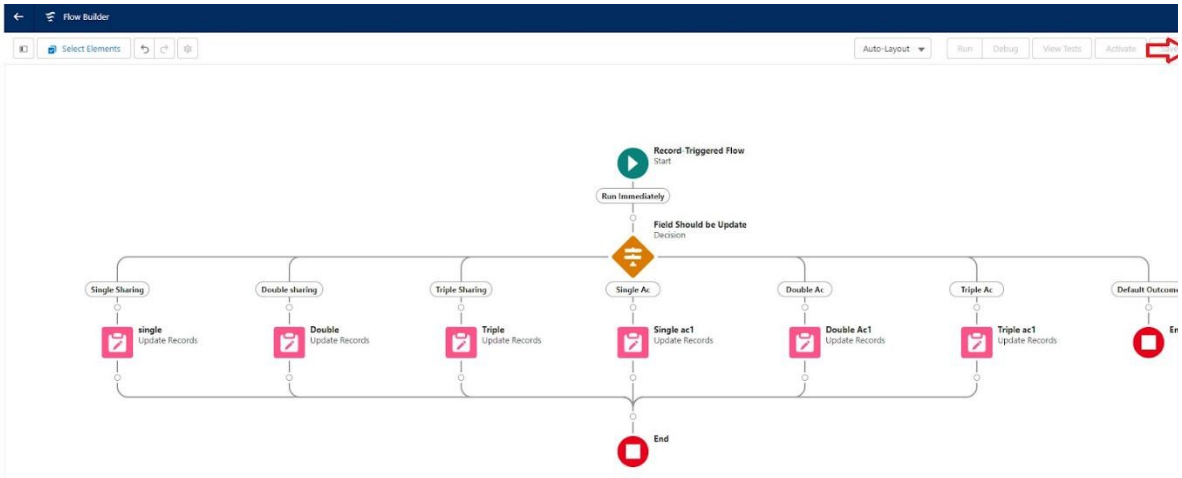
- Enter the Outcome DetailsLabel: Double Ac, Outcome API name: Gets Automatically Generated.

  - Resource: Select Record.Room sharing.
  - Operator: Select Equals.
  - Value: Select Doublesharing.
  - Click on “Add Condition”
  - Resource: Select Record.AC-3000.
  - Operator: Select Equals.
  - Value: Select True.
  - Click on “+” Symbol In the OutcomeOrder.

- Enter the Outcome Details Label: Triple Ac, Outcome API name: Gets Automatically Generated.

  - Resource: Select Record.Room sharing.
  - Operator: Select Equals.
  - Value: Select Triplesharing.
  - Click on “Add Condition”
  - Resource: Select Record.AC-3000.
  - Operator: Select Equals.
  - Value: Select True.
  - Click on Done.

The Flow will Form and Click on Save.



1. Enter the Flow Label: Update Amount Field, Flow API Name: Gets Automatically GeneratedandClick on Save.

Conclusion:

The CRM application for managing bookings in your co-living space is an essential tool to streamline and enhance the customer experience. It will allow you to efficiently manage and store customer details,enabling residents to easilychoose from differentair-conditioned rooms with multiple sharing options. The platform will also enable users to select special food items on a daily basis, catering to their individual preferences. Additionally, the application will support multiple payment modes,ensuring flexibility and conveniencefor residents.

Moreover, the feedbackfeature will empowerresidents to provideinsights into the quality of services, suchas room cleaning, internet connectivity, and food services, which will help maintain and improveservice standards.