

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 services like 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 browse and select from different AC rooms with multiple sharing options (e.g., single, double, triple sharing).
- 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 a scale 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 insights on 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 booking is made, the user will receive a confirmation email with details of their booking.
- k. **Payment Reminders:** The application will send reminders to users for pending payments.
- 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.

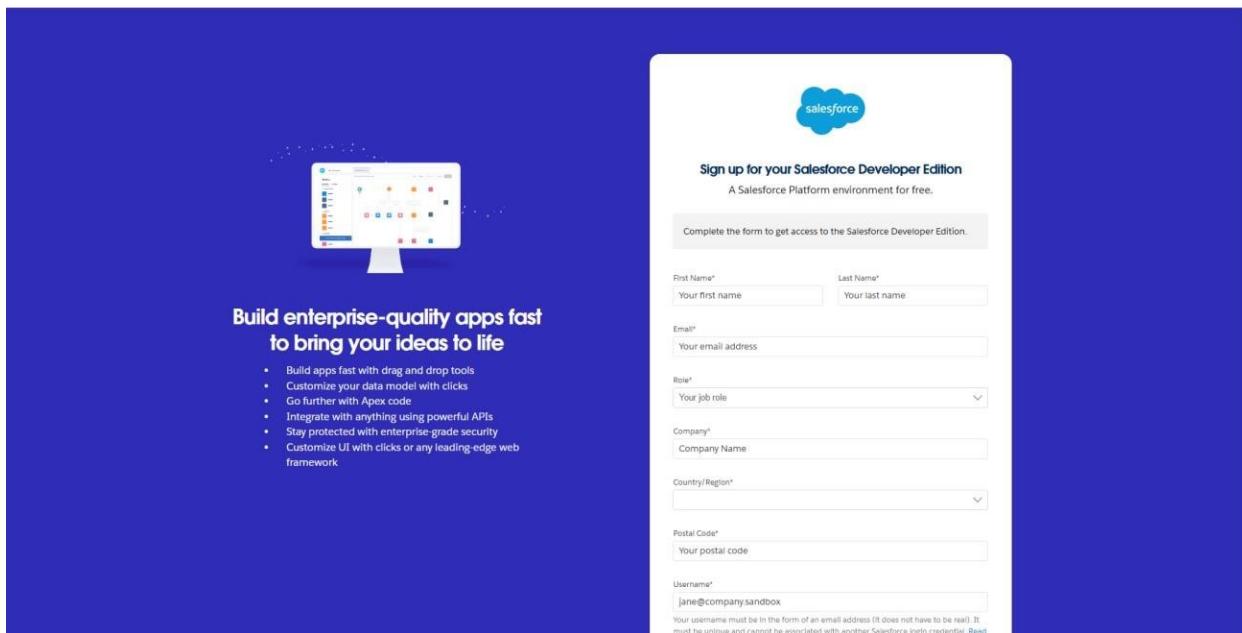
Milestone 1 - Introduction to Salesforce:

What is Salesforce?

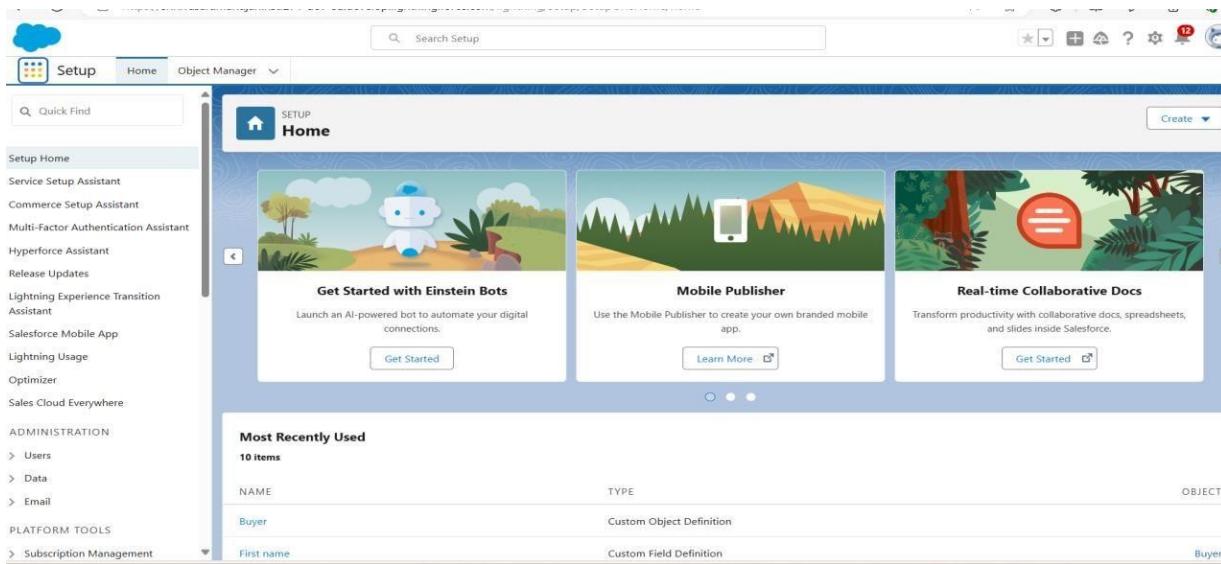
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate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

Activity 1: Creating Developer Account:

<https://developer.salesforce.com/signup>



Activity 2: Account Activation:



Activate your account by clicking the verify account which you received to your E-mail id.

Milestone 2 – Object

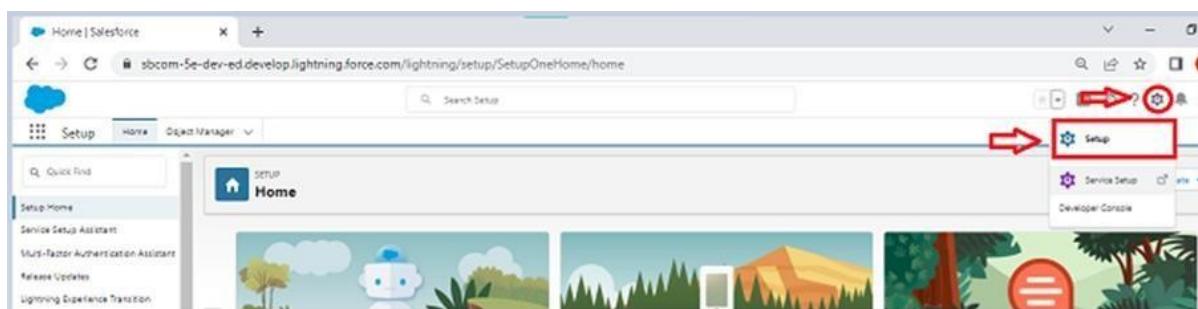
What Is an Object?

Salesforce objects are database tables that permit you 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 created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a data-sharing structure.

To Navigate to Setup page:



Click on gear icon ? click setup..

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.

SETUP

New Custom Object

Custom Object Definition Edit

Save | Save & New | Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Total Room	Example:	Account	1
Plural Label	Total Rooms	Example:	Accounts	

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name	Total_Rooms	Example:	Account	2
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Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

-None-

Enter Record Name Label and Format

The Record Name appears in page layouts, tabs, related lists, inquiries, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Total No Of Rooms	Example:	Account Name	3
Data Type	Text			

k. Leave everything else as is, and click Save.

Optional Features

- Allow Reports 
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search 

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

Save | Save & New | Cancel



Create a custom object for Customer

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The main title is 'Customer1'. On the left, a sidebar lists various setup categories: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The right panel displays the 'Details' section for the 'Customer1' object. It includes fields for Description, API Name (Customer1__c), Singular Label (Customer1), and Plural Label (Customers). Under the 'Edit' tab, there are checkboxes for Enable Reports, Track Activities, Track Field History, Deployment Status (set to Deployed), and Help Settings, along with a link to the Standard salesforce.com Help Window.

Create a custom object for Room Booking

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The main title is 'Room Booking'. The left sidebar and right panel structure are identical to the 'Customer1' screenshot, showing the 'Details' section with API Name (Room_Booking__c), Singular Label (Room Booking), and Plural Label (Room Bookings). The 'Edit' tab settings include checkboxes for Enable Reports, Track Activities, Track Field History, Deployment Status (set to Deployed), and Help Settings, along with a link to the Standard salesforce.com Help Window.

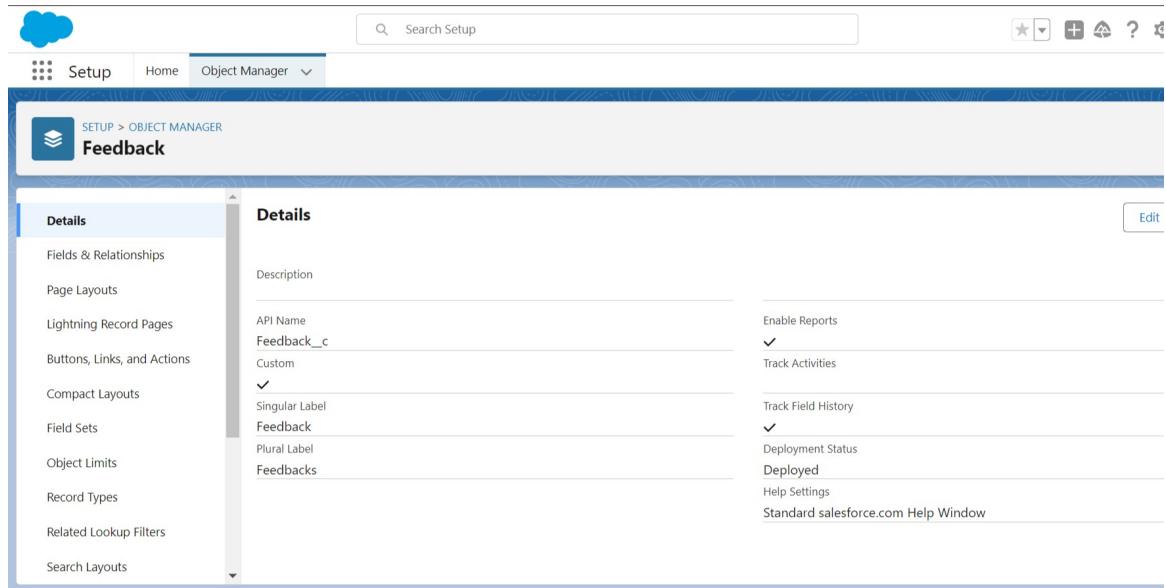
Create a custom object for Payment

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Search Setup' input field, and various global buttons. The main header says 'SETUP > OBJECT MANAGER' and displays the object name 'Payment1'. On the left, a sidebar lists options like 'Fields & Relationships', 'Page Layouts', and 'Buttons, Links, and Actions'. The right panel is titled 'Details' and contains fields for 'Description', 'API Name' (Payment1_c), 'Custom' (checked), 'Singular Label' (Payment1), 'Plural Label' (Payments), and various deployment and help settings. An 'Edit' button is at the top right.

Create a custom object for Food Selection

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Search Setup' input field, and various global buttons. The main header says 'SETUP > OBJECT MANAGER' and displays the object name 'Food Selection'. On the left, a sidebar lists options like 'Fields & Relationships', 'Page Layouts', and 'Buttons, Links, and Actions'. The right panel is titled 'Details' and contains fields for 'Description', 'API Name' (Food_Selection__c), 'Custom' (checked), 'Singular Label' (Food Selection), 'Plural Label' (Food Selections), and various deployment and help settings. An 'Edit' and 'Delete' button are at the top right.

Create a custom object for Feedback



Milestone 3 - Tabs

What is Tab : A tab is like a user interface that is used to build records for 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 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:(Total Rooms)

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

The screenshot shows the Salesforce Setup interface with the following highlights:

- Setup** button (top left)
- Quick Find bar** (Search bar) with the term "Tabs" entered.
- Custom Tabs** section (under User Interface)
- New** button (top right of the list table)
- Object Tabs** table listing various tabs with their descriptions and icons.

The screenshot shows the "New Custom Object Tab" creation page and the "Tab Style Selector" dialog.

New Custom Object Tab page (left):

- Step 1. Enter the Details**
- Choose the custom object for this new custom tab. Fill in other details.
- Select an existing custom object or create a new custom object now.
- Object**: Total Room (highlighted with a red arrow)
- Tab Style**: Keys (highlighted with a red arrow)
- (Optional) Choose a Home Page Custom Link to show as a splash page the first time a user visits this tab.
- Description: Enter a short description.

Tab Style Selector dialog (right):

- Contains a grid of icons representing different tab styles, such as Airplane, Bank, Books, Building, Cell phone, Circle, CRT TV, Dice, Form, Hammer, Heart, Hot Air Balloon, Keys, Alarm clock, Bell, Bottle, Building Block, Chalkboard, Compass, Cup[1], Factory, Gears, Hands, Helicopter, Insect, Apple[1], Big top, Box, Caduceus, Castle, Chess piece, Computer, Desk, Fan[1], Globe, Handsaw, Hexagon, IP Phone, Leaf[1], Balls, Boat, Bridge, Camera, CD/DVD, Chip, Credit card, Diamond, Flag, Guitar, Headset, Highway Sign, Jewel, Lightning.
- Create your own style** button (top right)

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 in one 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.

New Lightning App

App Details & Branding

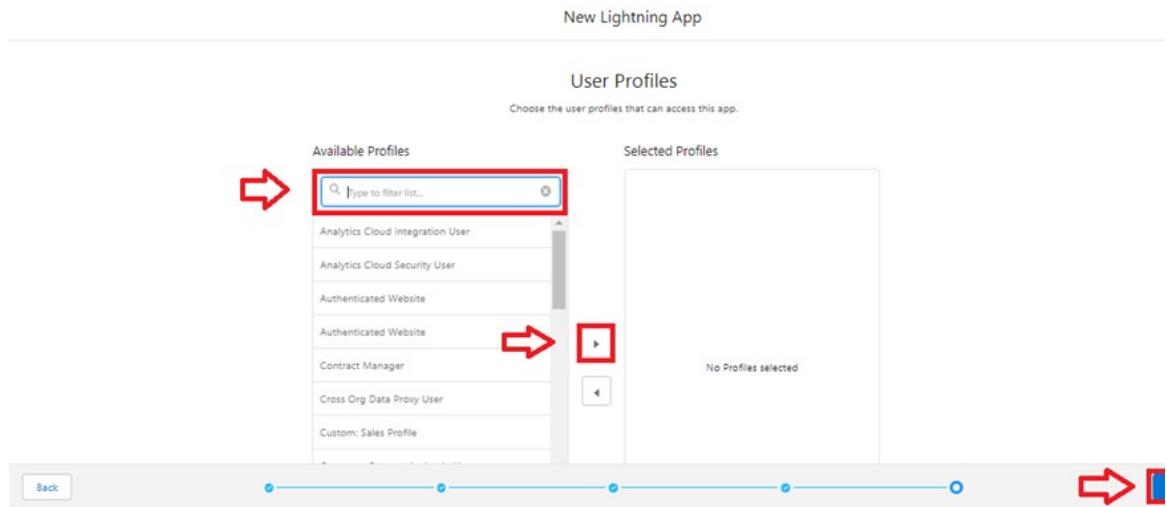
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details	App Branding
* App Name <input type="text" value="Name your app..."/> * Developer Name <input type="text" value="Enter a developer name..."/> Description <input type="text" value="Enter a description..."/>	Image <input type="button" value="Upload"/> Primary Color Hex Value <input type="color" value="#007002"/> <small>Use the app's image and color instead of the org's custom theme</small>

App Launcher Preview

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 valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records becomes simpler 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 simply delete a Standard Field until it is a non-required 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 common in every Salesforce application. They are,

? Created By

? Owner

? Last Modified

? Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organization 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 depends on the user, and he can add/remove Custom Fields of any given form.

Activity 1: Creation of fields for the customer1 object

1. To create fields in an object:

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

Now click on "Fields & Relationships" > New

The screenshot shows the Salesforce Object Manager interface. The top navigation bar has 'SETUP' and 'OBJECT MANAGER' buttons, followed by 'Customer1'. The left sidebar lists various object settings like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' with a sub-header '8 items, Sorted by Field Label'. It contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists standard fields such as Created By, current Status, Customer Name, Email Id, Last Modified By, Owner, Permanent Address, and Phone no. At the top right of the table are buttons for Quick Find, New, Deleted Fields, Field Dependencies, and Set History Tra.

3. Select Data Type as a "Phone"

The screenshot shows the 'Fields & Relationships' page for Customer1. The left sidebar shows 'Fields & Relationships' is selected. The main area displays a list of field types with their descriptions. The 'Phone' type is highlighted with a red box and a red arrow pointing to its description: 'Allows users to enter any phone number. Automatically formats it as a phone number'. Other options like Currency, Date, and Number are also listed with their descriptions.

4. Click on next

To create another fields in an object:

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

- 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

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: Total Room
Summarized Object: Room Bookings

Select Roll-Up Type

COUNT

SUM
 MIN
 MAX

Field to Aggregate: None

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

2. Click on Next > Next > Save and new

Creation of another fields for the Payment1 object

To create fields in an object:

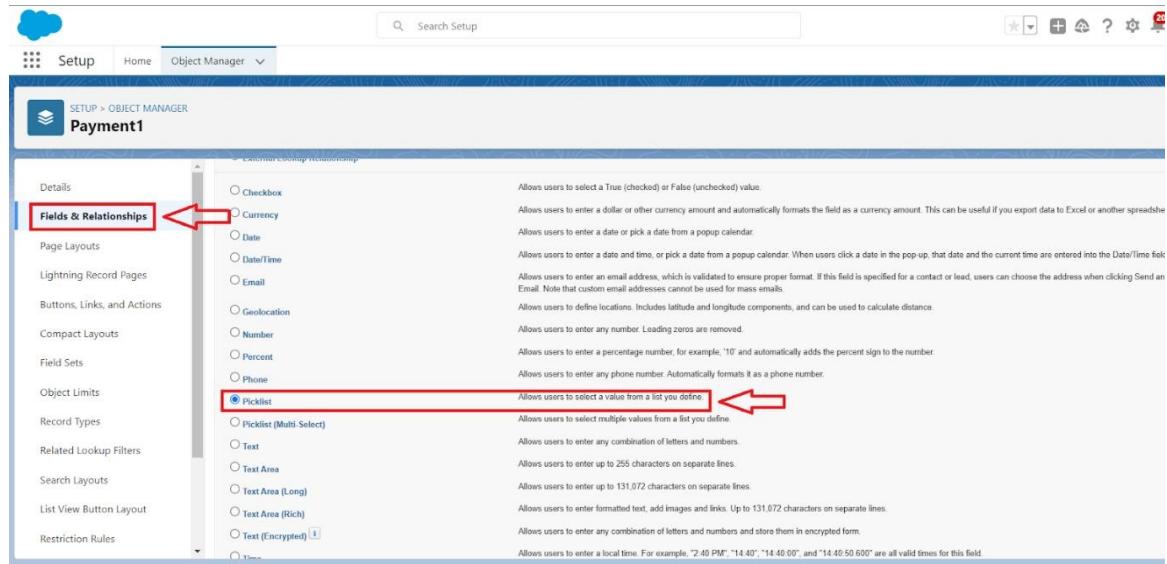
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
2. Now click on “Fields& Relationships” > New

SETUP > OBJECT MANAGER
Payment1

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(Customer)		✓
Payment ID	Payment_ID_c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number		✓
Room Booking	Room_Booking_c	Lookup(Room Booking)		✓

3. Select Data Type as a “Picklist”



1. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the above as following:
 - Field Label: Select Lunch
 - Under Value - Enter values, with each value separated by 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 fields for the Feedback object

1. Create fields & relationship to an object:

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

Setup > Object Manager
Feedback

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		
Housecleaning	Housecleaning__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer1)		✓
Owner	OwnerId	Lookup(User.Group)		✓
Suggestion	Suggestion__c	Text Area(255)		

3. Select Data Type as a “LookupRelationship”

4. Click on Next

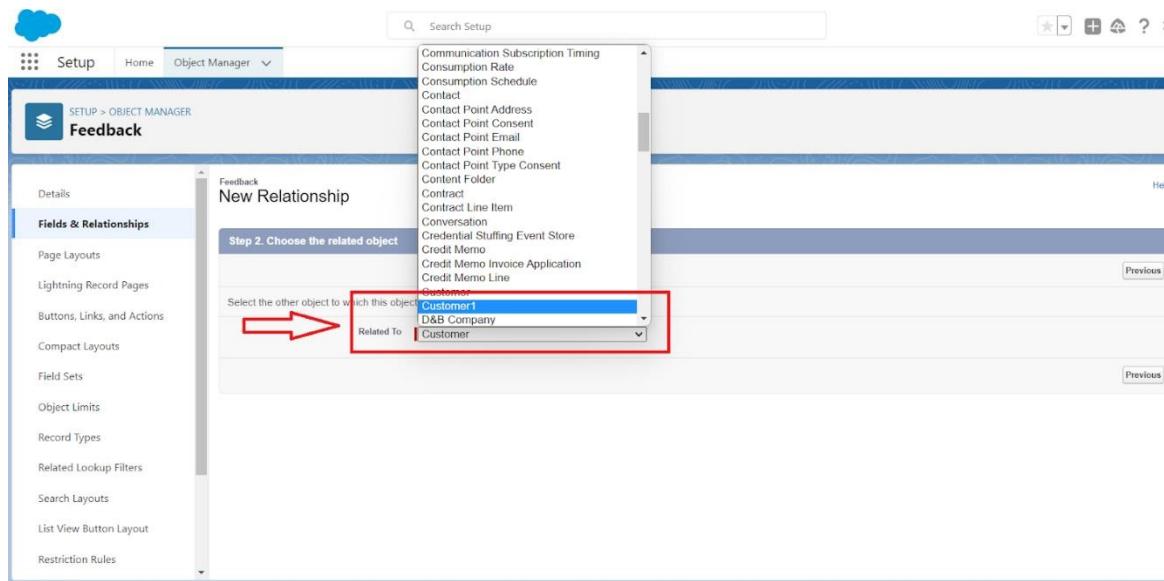
Setup > Object Manager
Feedback

Fields & Relationships

Data Type

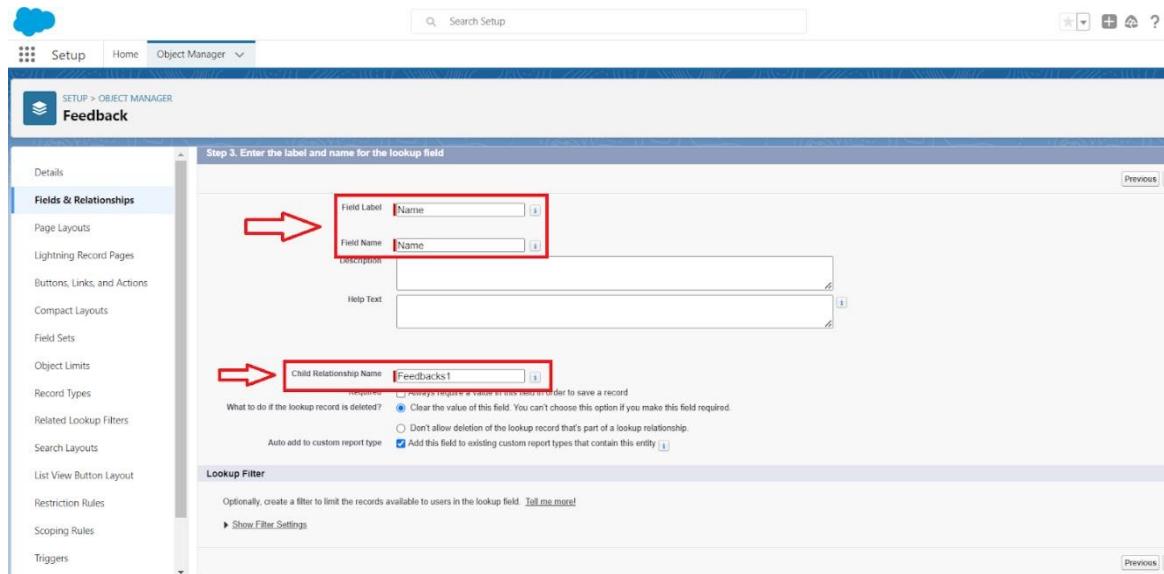
- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
-

5. Click on the Related to drop down and Select the Customer1 object and click on Next



6. Fill the Above as following:

- Change the Field Label: Name
- Field Name :It's gets auto generated
- 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 the object.
2. Now click on “Fields& Relationships” > New

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback No	Name	Auto Number		✓
Food	Food__c	Picklist		
Housecleaning	Housecleaning__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer1)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Suggestion	Suggestion__c	Text Area(255)		

1. Select Data Type as a “Picklist”

2. Click on Next

Creation of fields for the Total Rooms object

1. To create fields in an object:

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
count	count__c	Roll-Up Summary (COUNT Room Booking)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		

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

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change. **3**

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in it.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or “detail”) and another object (the parent, or “master”) where:

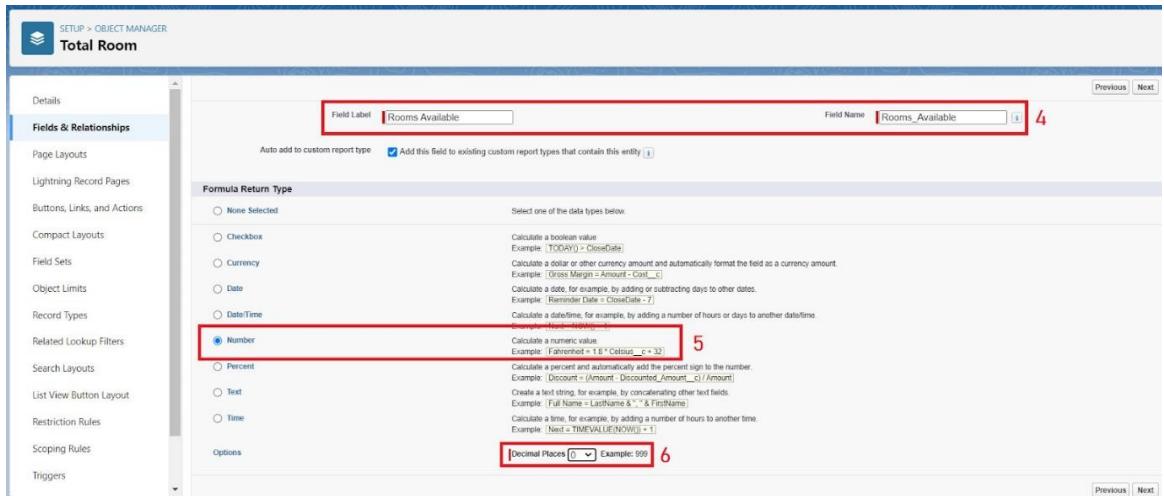
- The relationship field is required on all detail records.

4. Fill the Above 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 places as “0” and Click on Next



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

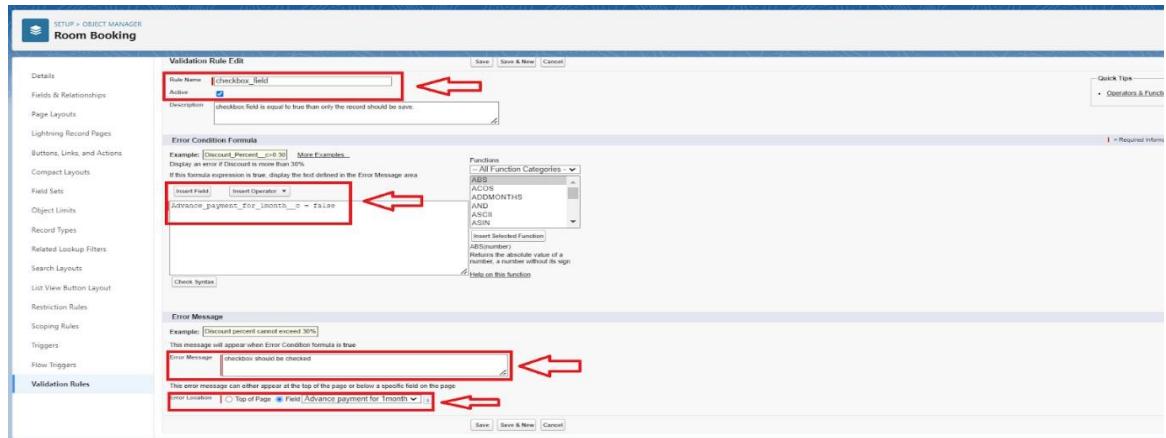
9. Click on the AdvancedFormula “30 - Rooms_Booked_c ” and Check Syntax
10. Click on Next > Next > Save and new.

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 message and prevents the 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. Enter Rule name “checkbox field” and make the validation should be Active.
4. Enter the formula in the formula Box “Advance_payment_for_1month_c = false” and check for syntax error.
5. Enter the error message “Checkbox should be checked”
6. Select error location as field(Advance payment for 1month)



7. Click on save.

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.

SETUP
Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="Custom user"/>

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.

	Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All
Customers		<input checked="" type="checkbox"/>						
Feedbacks		<input checked="" type="checkbox"/>						
Food Selections		<input checked="" type="checkbox"/>						
Payments		<input checked="" type="checkbox"/>						
Room Bookings		<input checked="" type="checkbox"/>						
Total Rooms		<input checked="" type="checkbox"/>						

Session Settings

Session Times Out After: 8 hours of inactivity

Session Security Level Required at Login: None

Password Policies

- User passwords expire in: Never expires
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obscure secret answer for password resets:
- Require a minimum 1 day password lifefame:

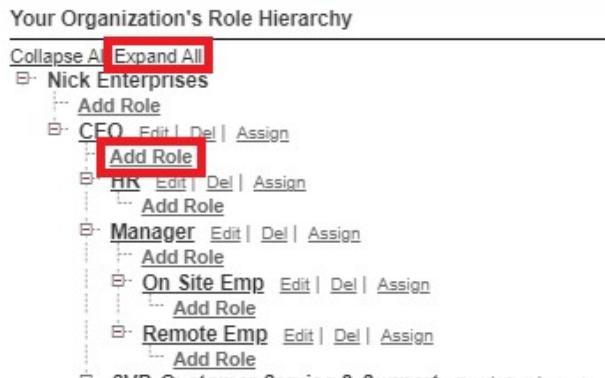
5. Scroll down and Clickon Save.

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.

Marketing Role

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



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

Role Edit
New Role

Role Edit

Label	Marketing
Role Name	Marketing
This role reports to	CEO
Role Name as displayed on reports	

Save **Save & New** **Cancel**

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.

Role Edit
New Role

Role Edit

Label	Receptionist
Role Name	Receptionist
This role reports to	CEO
Role Name as displayed on reports	

Save **Save & New** **Cancel**

4. Then click on Save.

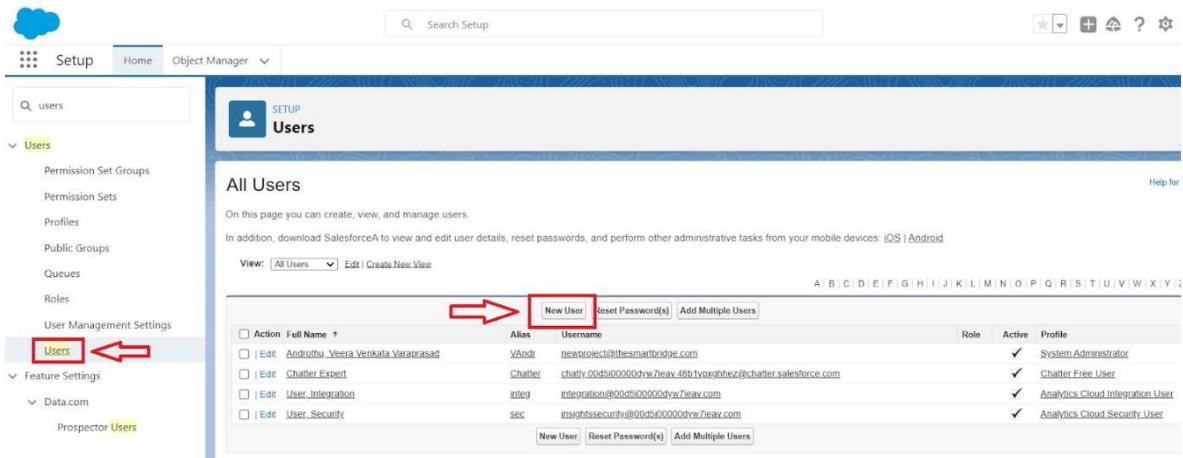
Users

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.



The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with various setup categories like Permission Set Groups, Profiles, and Roles. The main area is titled 'All Users' and shows a list of existing users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. At the top of the user list table, there are three buttons: 'New User' (highlighted with a red box and arrow), 'Reset Password(s)', and 'Add Multiple Users'. The 'New User' button is the primary focus of the screenshot.

2. Fill in the fields

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

New User

User Edit

General Information

First Name: sandeep
Last Name: gujja
Alias: sgujj
Email: sandeep@gmail.com
Username: gsandeep@sunny.com
Nickname: sunny

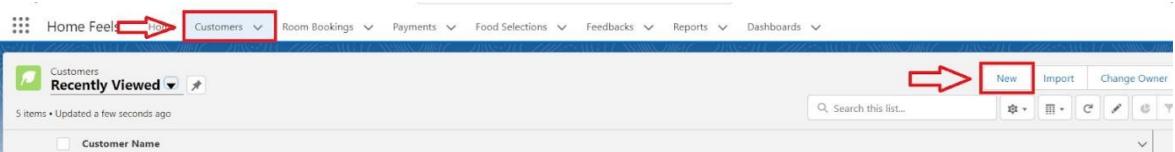
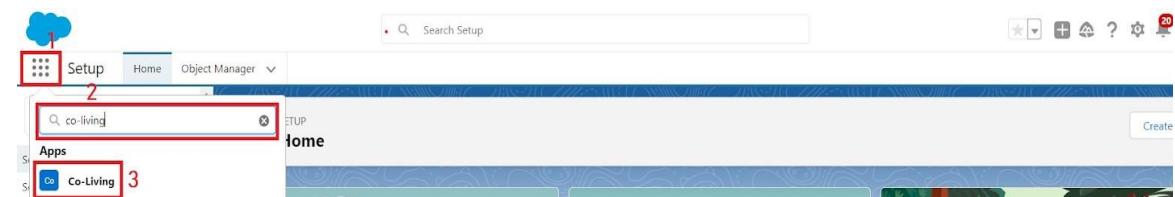
Role: CEO
User License: Salesforce
Profile: Custom user
Active: ✓

3. save..

User Adoption

Create a Record (Customers)

- 1.Click on App Launcher on the left side of the screen.
- 2.Search Home Feels & click on it.



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

Record(Customers)

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

The screenshot shows the 'Customers' tab selected in the top navigation bar. The main content area displays the details for a customer named 'sandeep'. A red box highlights the 'Details' tab. The details shown include:

Customer Name	sandeep	Owner	Veera Venkata Varaprasad Androthu
Phone no	970526532	Permanent Address	Hyderabad
Email id	sandeep@gmail.com	current Status	Employee
Created By	Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm	Last Modified By	Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm

Delete a Record (Customers)

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

The screenshot shows the 'Customers' tab selected in the top navigation bar. The main content area displays a list of recently viewed customers under 'Recently Viewed'. A red box highlights the 'sandeep' entry. To the right of the list, there are buttons for 'New', 'Import', and 'Change Owner'. Below the list, there are buttons for 'Edit' and 'Delete'. A red box highlights the 'Delete' button. The list of customers is as follows:

Customer Name
1 sandeep
2 Abhilash
3 Ganesh
4 suman
5 Prasad

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

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.

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with tabs like Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation is a search bar labeled 'Search recent reports...' and a 'New Report' button (also highlighted with a red box). On the left, there's a sidebar with categories: Reports, Recent (highlighted with a red box), Created by Me, Private Reports, Public Reports, and All Reports. The main area displays a table of recent reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
Room booking report		custom report	Veera Venkata Varaprasad Androthu	14/6/2023, 2:58 pm	
Room booking report		Private Reports	Veera Venkata Varaprasad Androthu	7/6/2023, 4:53 pm	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	5/6/2023, 10:09 am	

3. Select report type from category or from report type panel or from search panel "Customers with Room Bookings with Total Rooms" > click on start report.
4. Customize your report
5. Add fields from left pane as shown below.

The screenshot shows a report configuration interface. On the left, there's a sidebar titled 'Fields' with sections for 'Outline' (containing 'GROUP ROWS', 'Add group...', and 'Customer Name'), 'Columns' (containing 'Room No.', 'Phone no.', 'Email id', 'Permanent Address', 'Current Status', 'Room sharing', 'Advance payment for 1month', 'AC - 3000', and 'Amount'), and 'Subtotal'. The main area is titled 'Customers with Room Bookings with Payments' and shows a preview of a report with columns: Customer Name, Room No., Phone no., Email id, Permanent Address, Current Status, Room sharing, Advance payment for 1month, AC - 3000, and Amount. A red arrow points to the 'Save' button at the top right of the interface.

6. Save or run it.

Dashboards

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

Create Dashboard

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

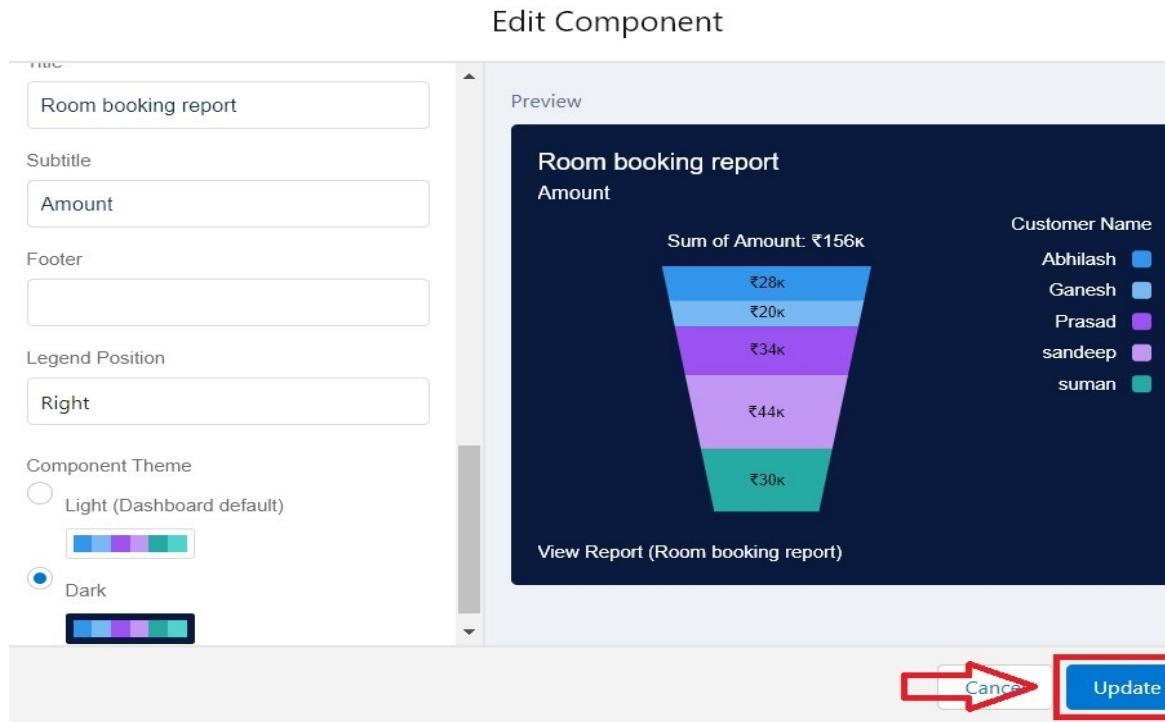
The screenshot shows the 'Co-Living' application interface. At the top, there's a navigation bar with icons for Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Dashboards' tab is highlighted with a red box. In the center, there's a list of dashboards under the heading 'Recent' (2 items). A red box highlights the 'New Dashboard' button in the top right corner of this list. The bottom part of the screen shows a table with columns: DASHBOARDS, Dashboard Name, Description, Folder, Created By, Created On, and Subscribed.

2. Give a Name and click on Create.

3. Select add component.

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

The screenshot shows a 'Select Report' dialog box. On the left, there are two sections: 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports) and 'Folders' (Created by Me, Shared with Me, All Folders). The main area lists reports with their details: 'Room booking report' (Veera Venkata Varaprasad Androthu - 14-Jun-2023, 2:58 pm - custom report), 'Room booking report' (Veera Venkata Varaprasad Androthu - 07-Jun-2023, 4:53 pm - Private Reports), and 'Sample Flow Report: Screen Flows' (Automated Process - 05-Jun-2023, 10:09 am - Public Reports). A red box highlights the first 'Room booking report' entry. A red arrow points to the 'Cancel' button at the bottom right of the dialog.



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

Flows

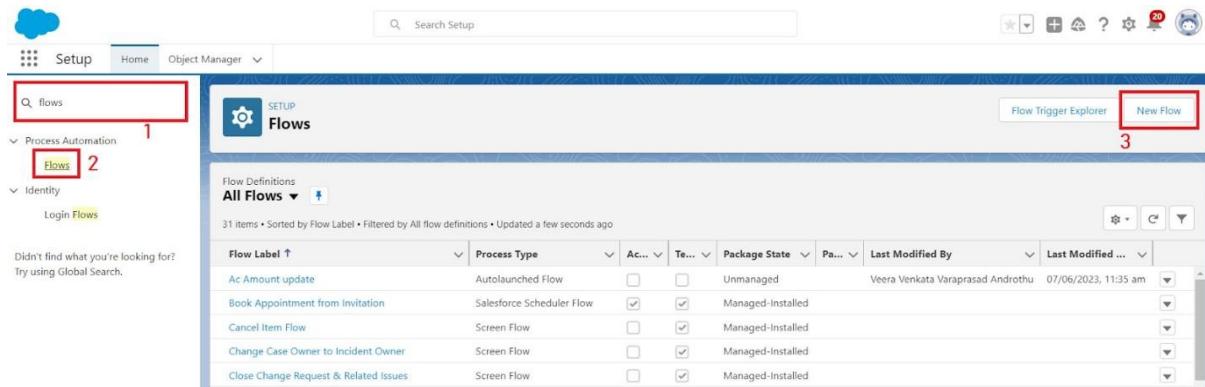
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Why do we need to create a flow:

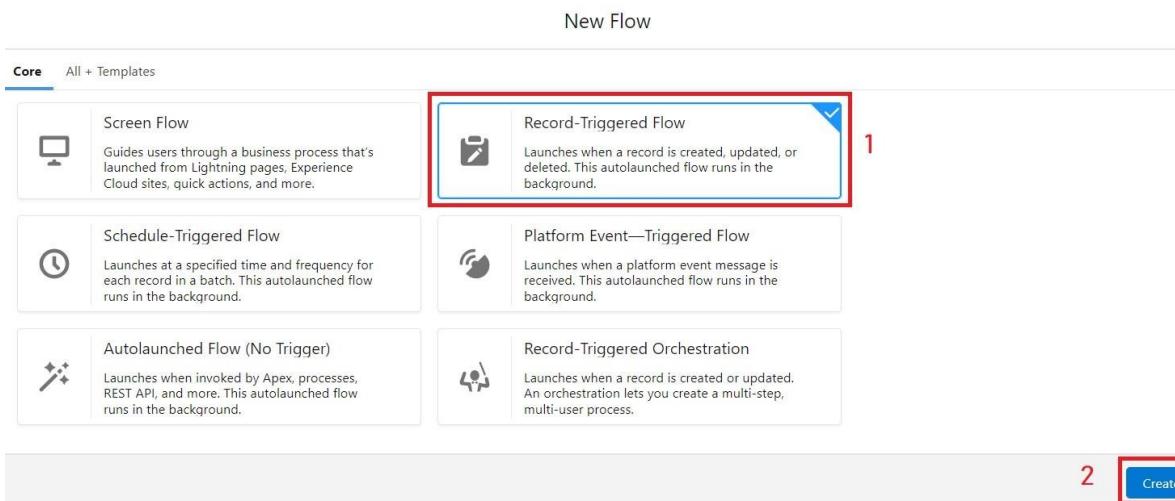
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

Create a Flow

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



2. Select the Record-triggered flow and Click on Create.



3. Select the Object as a Room Booking

in the Drop down list. 4. Select the 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.
 - o Operator: Select Equals.
 - o Value: Select Singlesharing.
 - o Click on “Add Condition”
 - o Resource: Select Record.AC-3000.
 - o Operator: Select Equals.
 - o Value: Select False.
 - o Click on “+” Symbol In the OutcomeOrder.

New Decision

* Label	* API Name																								
Field Should be Update	Field_Should_be_Update																								
Description	1																								
<p>Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.</p> <table border="1"> <tr> <td>OUTCOME ORDER</td> <td>2</td> <td>OUTCOME DETAILS</td> </tr> <tr> <td>Single Sharing</td> <td>4</td> <td>* Label Single Sharing * Outcome API Name Single_Sharing</td> </tr> <tr> <td>Default Outcome</td> <td></td> <td>Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td> </tr> <tr> <td></td> <td></td> <td>3</td> </tr> <tr> <td></td> <td></td> <td> <table border="1"> <tr> <td>Resource \$Record > Room sharing</td> <td>Operator Equals</td> <td>Value single sharing</td> </tr> <tr> <td>Resource \$Record > AC - 3000</td> <td>Operator Equals</td> <td>Value False</td> </tr> </table> </td> </tr> <tr> <td></td> <td></td> <td>+ Add Condition</td> </tr> </table>		OUTCOME ORDER	2	OUTCOME DETAILS	Single Sharing	4	* Label Single Sharing * Outcome API Name Single_Sharing	Default Outcome		Condition Requirements to Execute Outcome All Conditions Are Met (AND)			3			<table border="1"> <tr> <td>Resource \$Record > Room sharing</td> <td>Operator Equals</td> <td>Value single sharing</td> </tr> <tr> <td>Resource \$Record > AC - 3000</td> <td>Operator Equals</td> <td>Value False</td> </tr> </table>	Resource \$Record > Room sharing	Operator Equals	Value single sharing	Resource \$Record > AC - 3000	Operator Equals	Value False			+ Add Condition
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Cancel																									

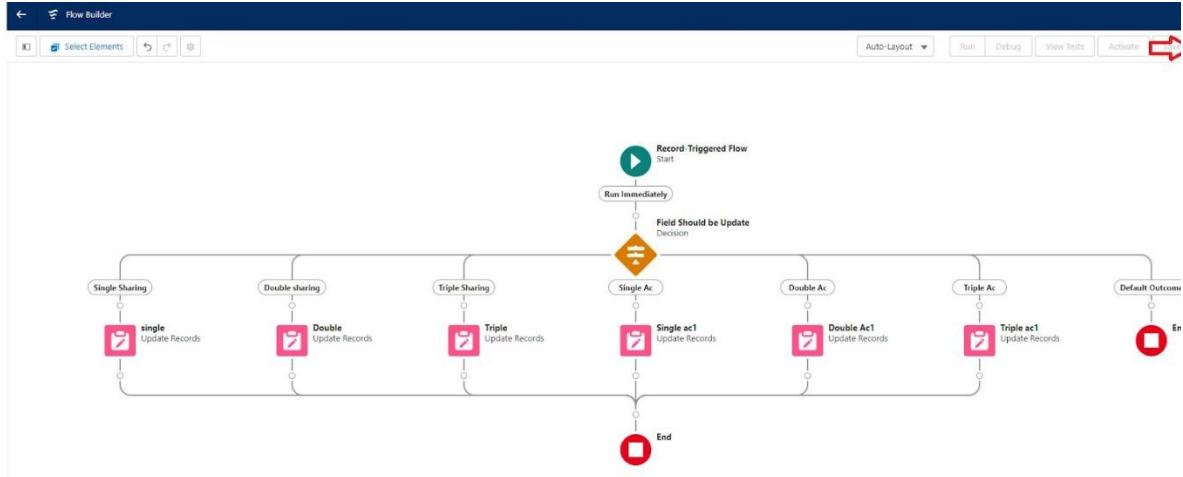
- Enter the Outcome DetailsLabel: Double sharing,Outcome API name: Gets Automatically Generated.
 - o Resource: Select Record.Room sharing.

- 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 Details Label: 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 Generated and Click 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 easily choose from different air-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 convenience for residents.

Moreover, the feedback feature will empower residents to provide insights into the quality of services, such as room cleaning, internet connectivity, and food services, which will help maintain and improve service standards.

