



# A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING

## PREPARED BY:

Ralla Swathi Reddy  
rallaswathireddy2823@gmail.com  
MallaReddy University

# PROJECT ABSTRACT

The co-living industry is rapidly growing, offering individuals and groups flexible and affordable living options. However, managing bookings, payments, and communication in a shared living environment can be complex. The CRM application for managing co-living space bookings aims to streamline operations by providing a centralized platform for handling reservations, tenant information, payments, and communication. Key features include real-time availability updates, automated invoicing, and integrated communication tools, all designed to enhance the efficiency of co-living operators. The application also offers advanced analytics to optimize occupancy rates and improve customer satisfaction, making it ideal for managing multiple properties. By reducing manual errors and enhancing customer relations, this CRM solution helps co-living providers gain a competitive edge in the growing market.

## INTRODUCTION

A CRM (Customer Relationship Management) application for managing co-living bookings offers an efficient solution for streamlining the entire process of tenant management, room allocation, and service coordination in shared living spaces. This application aims to simplify the experience for both property managers and residents by integrating features like automated booking systems, payment tracking, customer support, and personalized communication. By centralizing all essential data and interactions, this CRM enhances operational efficiency, improves tenant satisfaction, and fosters a sense of community within co-living environments. Whether it's coordinating maintenance requests or managing lease agreements, this tool ensures a seamless and hassle-free co-living experience.

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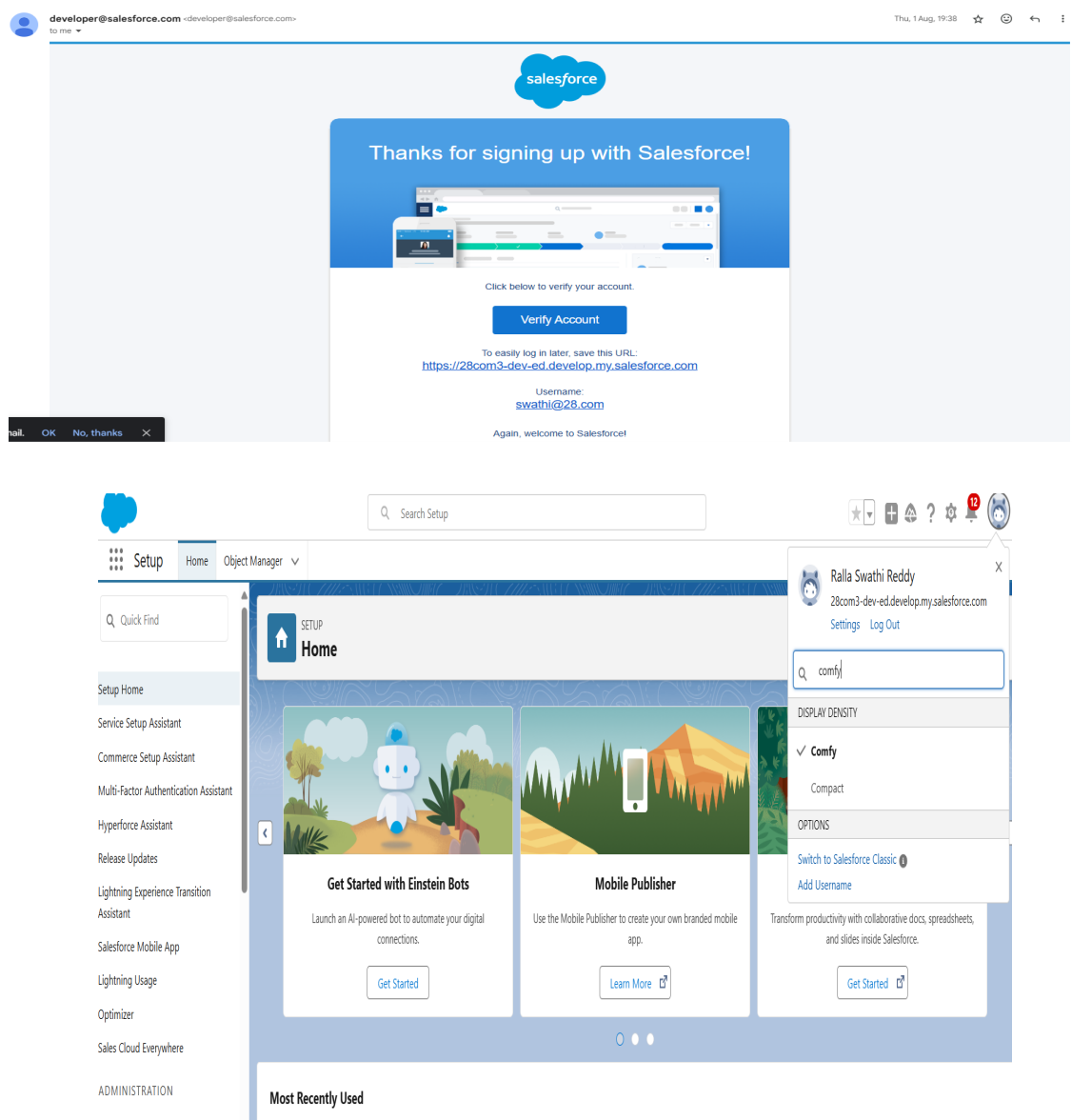
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# 1.SALESFORCE

Salesforce is a customer success platform that helps businesses manage sales, service, marketing, and analytics. It enables customer relationship management, employee collaboration, and secure cloud data storage, allowing businesses to operate from anywhere.

- **Creating Developer Account:** Created a developer organisation in salesforce platform by filling all the relevant details.

- **Account Activation:** I verified my email, set a new password, answered a security question, and was redirected to the Salesforce setup page.



## 2.OBJECT

Salesforce objects are database tables that permit you to store data that is specific to an organization.

- **Create a custom object for Total Rooms:** Create a custom object named "Total Rooms" enter the required details, and save it.
- **Create a custom object for Customer:** Create a custom object named "Customer," enter the required details, and save it.
- **Create a custom object for Room Booking:** Create a custom object named "Room Booking" enter the required details, and save it.
- **Create a custom object for Payment:** Create a custom object named "Payment" enter the required details, and save it.
- **Create a custom object for Food Selection:** Create a custom object named "Food Selection" enter the required details, and save it.
- **Create a custom object for Feedback:** Create a custom object named "Feedback" enter the required details, and save it.

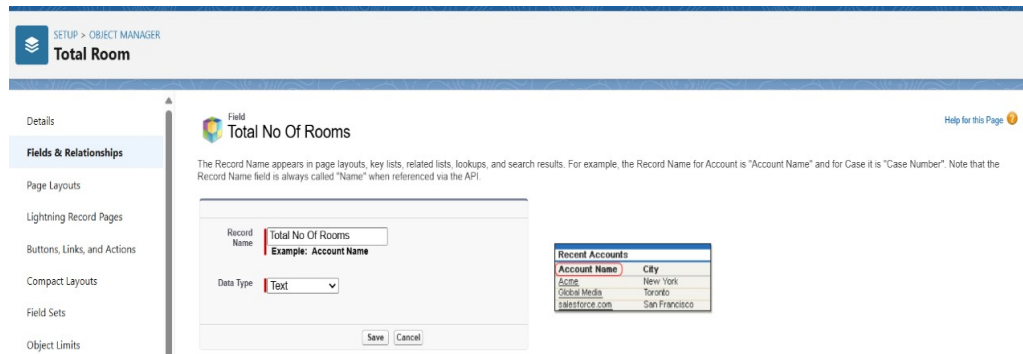


FIG 2.1: Create a Custom Object For Total Rooms

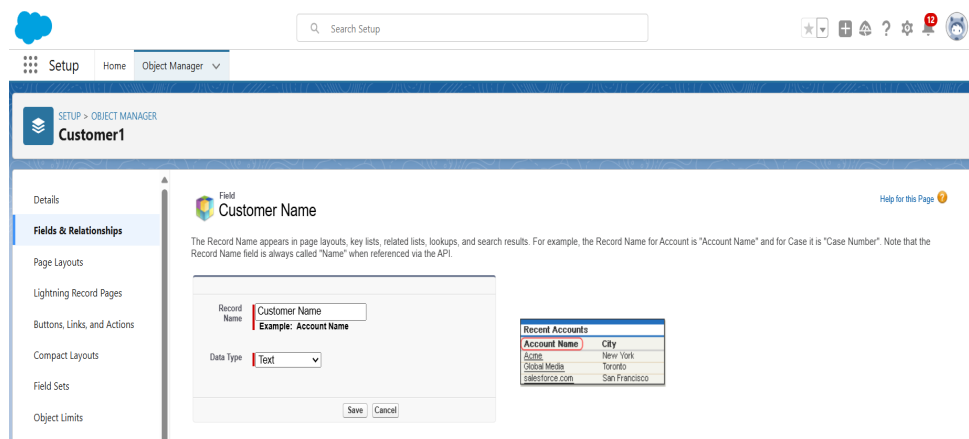


FIG 2.2: Create a Custom Object For Customer

**Room Booking**

The Record Name appears in page layouts, key lists, related lists, lookups, 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:   
Example: Account Name

Data Type:   
Display Format:   
Example: A-(0000) What is This?

Recent Accounts

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

**FIG 2.3: Create a Custom Object For Room Booking**

**Payment1**

The Record Name appears in page layouts, key lists, related lists, lookups, 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:   
Example: Account Name

Data Type:   
Display Format:   
Example: A-(0000) What is This?

Recent Accounts

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

**FIG 2.4 Create a Custom Object For Payment**

**Food Selection**

The Record Name appears in page layouts, key lists, related lists, lookups, 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:   
Example: Account Name

Data Type:   
Display Format:   
Example: A-(0000) What is This?

Recent Accounts

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

**FIG 2.5 Create a Custom Object For Food Selection**

**Feedback**

The Record Name appears in page layouts, key lists, related lists, lookups, 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:   
Example: Account Name

Data Type:   
Display Format:   
Example: A-(0000) What is This?

Recent Accounts

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

**FIG 2.6 Create a Custom Object For Feedback**

## 3.TABS

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

- **Creating a Tab for Total Rooms:** In the setup, search "Tabs," create a new custom tab for the "Total Rooms" object, select a style, and keep default profile settings.

The screenshot shows the 'Edit Custom Object Tab' interface for 'Total Rooms'. The page has a header with a gear icon and the word 'SETUP' above 'Tabs'. Below the header, it says 'Edit Custom Object Tab' and 'Total Rooms'. A instruction line reads 'Fill in the fields below to define the custom tab.' followed by a 'Help for this Page' link. The main section is titled 'Custom Tab Definition Edit' with a 'Close' button. Under 'Custom Object Tab Information', there is a table with columns 'Tab Label', 'Object', and 'Tab Style'. The 'Tab Label' is 'Total Rooms', the 'Object' is 'Total Room', and the 'Tab Style' is 'Keys'. Below this, there is an optional section for 'Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to '--None--'. A 'Description' text area is also present. At the bottom are 'Save' and 'Cancel' buttons.

-**Create a Tab for Customers:** In the setup, search "Tabs," create a new custom tab for the "Customers" object, select a style, and keep default settings for profiles and apps before saving.

The screenshot shows the 'Edit Custom Object Tab' interface for 'Customer1s'. The page has a header with a gear icon and the word 'SETUP' above 'Tabs'. Below the header, it says 'Edit Custom Object Tab' and 'Customer1s'. A instruction line reads 'Fill in the fields below to define the custom tab.' followed by a 'Help for this Page' link. The main section is titled 'Custom Tab Definition Edit' with a 'Close' button. Under 'Custom Object Tab Information', there is a table with columns 'Tab Label', 'Object', and 'Tab Style'. The 'Tab Label' is 'Customer1s', the 'Object' is 'Customer1', and the 'Tab Style' is 'People'. Below this, there is an optional section for 'Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to '--None--'. A 'Description' text area is also present. At the bottom are 'Save' and 'Cancel' buttons.

- **Create a Tab for Room Bookings:** In the setup, search "Tabs," create a new custom tab for the "Room Bookings" object, select a style, and keep default settings for profiles and apps.

The screenshot shows the 'Edit Custom Object Tab' interface for 'Room Bookings'. The page has a header with a gear icon and the word 'SETUP' above 'Tabs'. Below the header, it says 'Edit Custom Object Tab' and 'Room Bookings'. A instruction line reads 'Fill in the fields below to define the custom tab.' followed by a 'Help for this Page' link. The main section is titled 'Custom Tab Definition Edit' with a 'Close' button. Under 'Custom Object Tab Information', there is a table with columns 'Tab Label', 'Object', and 'Tab Style'. The 'Tab Label' is 'Room Bookings', the 'Object' is 'Room\_Booking', and the 'Tab Style' is 'Castle'. Below this, there is an optional section for 'Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to '--None--'. A 'Description' text area is also present. At the bottom are 'Save' and 'Cancel' buttons.

- **Create a Tab for Room Payments:** In the setup, search "Tabs," create a new custom tab for the "Payments" object, select a style, and keep default settings for profiles and apps .

The screenshot shows the 'Edit Custom Object Tab' form for 'Payment1s'. The form is titled 'Custom Tab Definition Edit' and includes a 'Custom Object Tab Information' section. In this section, the 'Tab Label' is 'Payment1s', the 'Object' is 'Payment1', and the 'Tab Style' is 'Credit card'. Below this, there is an optional section for 'Home Page Custom Link' with a dropdown menu set to 'None'. A description field is also present, with the placeholder text 'Enter a short description.' At the bottom of the form are 'Save' and 'Cancel' buttons.

- **Create a Tab for Room Food Selection:** In the setup, search "Tabs," create a new custom tab for the "Food Selection" object, select a style, and keep default settings for profiles and apps .

The screenshot shows the 'Edit Custom Object Tab' form for 'Food Selections'. The form is titled 'Custom Tab Definition Edit' and includes a 'Custom Object Tab Information' section. In this section, the 'Tab Label' is 'Food Selections', the 'Object' is 'Food Selection', and the 'Tab Style' is 'Telescope'. Below this, there is an optional section for 'Home Page Custom Link' with a dropdown menu set to 'None'. A description field is also present, with the placeholder text 'Enter a short description.' At the bottom of the form are 'Save' and 'Cancel' buttons.

- **Create a Tab for Room Feedback:** In the setup, search "Tabs," create a new custom tab for the "Feedback" object, select a style, and keep default settings for profiles and apps .

The screenshot shows the 'Edit Custom Object Tab' form for 'Feedbacks'. The form is titled 'Custom Tab Definition Edit' and includes a 'Custom Object Tab Information' section. In this section, the 'Tab Label' is 'Feedbacks', the 'Object' is 'Feedback', and the 'Tab Style' is 'Pencil'. Below this, there is an optional section for 'Home Page Custom Link' with a dropdown menu set to 'None'. A description field is also present, with the placeholder text 'Enter a short description.' At the bottom of the form are 'Save' and 'Cancel' buttons.



## 4. THE LIGHTNING APP

- **Create a Lightning App:** In the setup, search "App Manager," create a new Lightning App, fill in the app details, and keep default settings for app options and utility items.

Add navigation items (Total Rooms, Customers1, Room Booking, Payments1, Food Selection, Feedbacks, Reports, and Dashboards) and assign the "System Administrator" profile before saving and finishing.

The screenshot shows the 'App Settings' page in the Lightning App Builder. The left sidebar has 'App Details & Branding' selected. The main content area is divided into 'App Details' and 'App Branding'. Under 'App Details', there are fields for 'App Name' (Co-Living), 'Developer Name' (CoLiving), and a 'Description' (Our co-living space project aims to create a vibrant and inclusive community where...). Under 'App Branding', there is an 'Image' field with a placeholder image, a 'Primary Color Hex Value' field (0070D2), and an 'Org Theme Options' checkbox. At the bottom, there is an 'App Launcher Preview' showing the app's icon and name.

FIG 4.1: Create Lightning App

The screenshot shows the 'App Settings' page in the Lightning App Builder, specifically the 'Navigation Items' section. The left sidebar has 'Navigation Items' selected. The main content area is divided into 'Available Items' and 'Selected Items'. Under 'Available Items', there is a search bar and a list of items including Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, and Approval Requests. Under 'Selected Items', there is a list of items including Total Rooms, Room Bookings, Payments1, Food Selections, Feedbacks, Home, and Customer1s. Arrows are used to move items between the two lists.

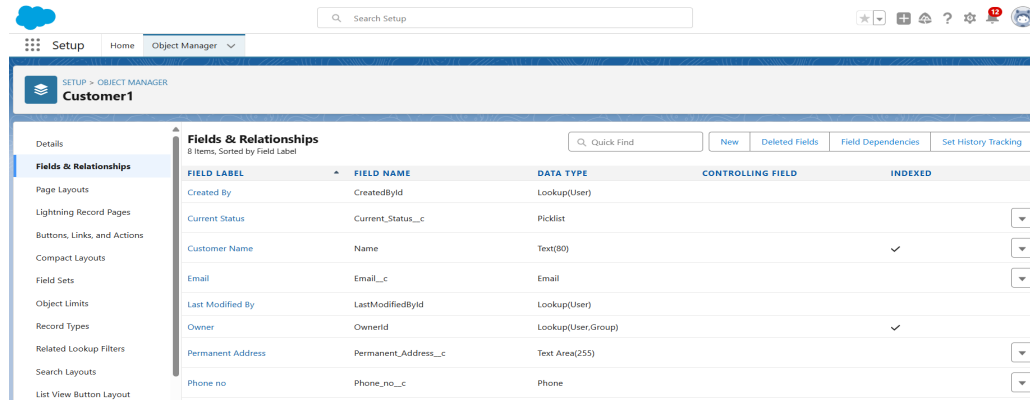
FIG 4.2: Add Navigation Items

The screenshot shows the 'App Settings' page in the Lightning App Builder, specifically the 'User Profiles' section. The left sidebar has 'User Profiles' selected. The main content area is divided into 'Available Profiles' and 'Selected Profiles'. Under 'Available Profiles', there is a search bar and a list of profiles including Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, B2B Reordering Portal Buyer Profile, and Contract Manager. Under 'Selected Profiles', there is a list of profiles including System Administrator. An arrow is used to move items between the two lists.

FIG 4.3: Add User Profile

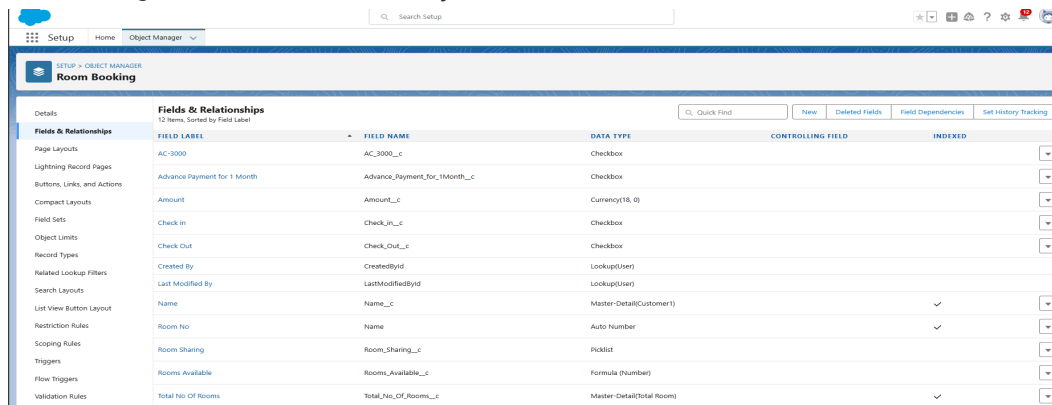
## 5. FIELDS & RELATIONSHIPS

- **Creation Of Fields For The Customer1 Object:** In Object Manager, add and save fields like Phone no, Email, Permanent Address, and Current Status (Picklist) to "Customer1."



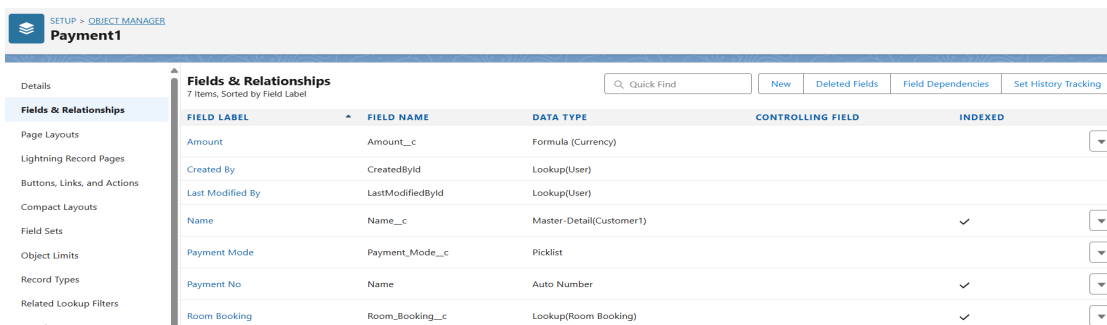
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Status	Current_Status__c	Picklist		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Permanent Address	Permanent_Address__c	Text Area(255)		
Phone no	Phone_no__c	Phone		

- **Creation Of Fields For The Room Booking Object:** Add various fields in "Room Booking" such as "Room Sharing," "Name," "Advance Payment," "Amount," and "Rooms Booked."



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
AC-3000	AC_3000__c	Checkbox		
Advance Payment for 1 Month	Advance_Payment_for_1_Month__c	Checkbox		
Amount	Amount__c	Currency(18, 0)		
Check in	Check_in__c	Checkbox		
Check Out	Check_Out__c	Checkbox		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)		✓
Room No	Name	Auto Number		✓
Room Sharing	Room_Sharing__c	Picklist		
Rooms Available	Rooms_Available__c	Formula (Number)		
Total No Of Rooms	Total_No_of_Rooms__c	Master-Detail(Total Room)		✓

- **Creation Of Fields & Relationship For Payment1** Create fields in "Room Booking" for "Room Sharing," "Name," "AC-3000," "Advance Payment," "Amount," and "Rooms Booked."



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

- **Creation Of Fields For The Food Selection Object:** Create a Master-detail field for "Name" in "Room Booking" linked to "Customer1," and add global picklists with field dependencies in "Food Selection."

SETUP > OBJECT MANAGER  
**Food Selection**

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules  
Triggers

Fields & Relationships  
10 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

- **Creation Of Fields For The Feedback Object:** In "Feedback," create a Lookup Relationship field for "Name" (linked to "Customer1"), and add picklist fields for "Roomcleaning," "Internet," "Food," and a "Suggestion" (Text Area) field.

SETUP > OBJECT MANAGER  
**Feedback**

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules

Fields & Relationships  
9 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

- **Creation Of Fields for the Total Rooms object:** In "Total Rooms," create a "Rooms Available" field (Formula, Number) with the formula "30 - Rooms\_Booked\_\_c." Save the field with default settings.

SETUP > OBJECT MANAGER  
**Total Room**

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types

Fields & Relationships  
6 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

## 6. VALIDATION RULE

Validation rules ensure data meets specified criteria before saving a record, triggering an error message if the criteria are not met.

### - Create a Validation Rule To An Room Booking Object:

- In "Room Booking," create a validation rule.
- Name it "checkbox field" and activate it.
- Use the formula `Advance\_payment\_for\_1month\_\_c = false`.
- Set the error message to "Checkbox , checked", "Advance Payment for 1 Month" field & Save .

The screenshot shows the 'Room Booking Validation Rule' configuration page in Salesforce. The rule is named 'checkbox\_field' and is active. The formula is 'Advance\_payment\_for\_1month\_\_c = false'. The error message is 'Checkbox , checked', 'Advance Payment for 1 Month'. The error location is set to 'Top of Page' and 'Field: Advance Payment for 1 Month'.

- **Create a Another Validation Rule To An Room Booking Object:** Create a validation rule in "Room Booking" named "check in rule," set to active, with the formula `Check\_in\_\_c = False`, an error message "Check box should be checked," and apply it to the "Check in" field. Save the rule.

The screenshot shows the 'Room Booking Validation Rule' configuration page in Salesforce. The rule is named 'check\_in\_rule' and is active. The formula is 'Check\_in\_\_c = False'. The error message is 'Check box should be checked'. The error location is set to 'Top of Page' and 'Field: Check in'.

## 7.PROFILES

A profile in Salesforce defines user permissions and settings, including object and field access, tab and app settings, and login controls, tailored to job functions like System Administrator or Sales Representative.

- **Custom User Profile:** Create a "Custom User" profile by cloning "Standard User," then grant full access to custom objects and save the profile.

The screenshot shows the 'Custom Object Permissions' section for a Custom User Profile. It features two tables for object permissions, each with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All).

Object	Read	Create	Edit	Delete	View All	Modify All
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedbacks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Food Selections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Object	Read	Create	Edit	Delete	View All	Modify All
Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Room Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Total Rooms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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 lifetime: ☐. Don't immediately expire links in forgot password emails: ☐.

- **Custom Platform User1:** Clone the "Standard Platform User" profile to create "Custom Platform User1," then set it to grant "Read" access to all specified objects and save.

The screenshot shows the 'Custom Object Permissions' section for Custom Platform User1. The permissions are more restrictive than the Custom User Profile, with only 'Read' access granted for most objects.

Object	Read	Create	Edit	Delete	View All	Modify All
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedbacks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food Selections	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Object	Read	Create	Edit	Delete	View All	Modify All
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Room Bookings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total Rooms	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Session Settings:** Session Times Out After: 2 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 lifetime: ☐. Don't immediately expire links in forgot password emails: ☐.

- **Custom Platform User2:** Clone the "Standard Platform User" profile to create "Custom Platform User2," granting full access to all objects and read-only access to "Total Rooms", save.

The screenshot shows the 'Custom Object Permissions' section for Custom Platform User2. It grants full access to most objects and read-only access to 'Total Rooms'.

Object	Read	Create	Edit	Delete	View All	Modify All
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedbacks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food Selections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Object	Read	Create	Edit	Delete	View All	Modify All
Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Room Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Total Rooms	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Session Settings:** Session Times Out After: 2 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 lifetime: ☐. Don't immediately expire links in forgot password emails: ☐.

## 8.ROLES

A role in Salesforce determines a user's record-level visibility and access within the organization. It controls what data users can see and interact with based on their role in the hierarchy.

### - Marketing Role:

Go to quick find > Search for Roles > click on set up roles.

1. Click on Expand All and click on add role under CEO role.
2. Click on Expand All and click on add role under CEO role.
3. SAVE.

The screenshot shows the 'Roles' setup page in Salesforce. The 'Marketing' role is selected. Below the role name, there is a description: 'Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.' The hierarchy is shown as 'MALLA REDDY UNIVERSITY > CEO > Marketing'. The role detail section shows the role name 'Marketing', the label 'Marketing', and the role reports to 'CEO'. The role is modified by 'Rajia Swathi Reddy' on 03/08/2024 at 6:45 pm. The role is assigned to the 'Role, Role and Internal Subordinates' sharing group. The role access is 'Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases'. The 'Users in Marketing Role' section shows a table with one user: 'Abhilash garapati' with alias 'gara' and email 'abhigara@gmail.com'.

Action	Full Name	Alias	Username	Active
Edit	Abhilash garapati	gara	abhigara@gmail.com	✓

### -Receptionist Role:

Go to quick find > Search for Roles > click on set up roles.

1. Click on Expand All and click on add role under CEO role.
2. Give Label as "Receptionist" and Role name gets auto populated.

The screenshot shows the 'Roles' setup page in Salesforce. The 'Receptionist' role is selected. Below the role name, there is a description: 'Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.' The hierarchy is shown as 'MALLA REDDY UNIVERSITY > CEO > Receptionist'. The role detail section shows the role name 'Receptionist', the label 'Receptionist', and the role reports to 'CEO'. The role is modified by 'Rajia Swathi Reddy' on 03/08/2024 at 6:46 pm. The role is assigned to the 'Role, Role and Internal Subordinates' sharing group. The role access is 'Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases'. The 'Users in Receptionist Role' section shows a table with one user: 'Ganesh gelli' with alias 'ggall' and email 'ggall@gmail.com'.

Action	Full Name	Alias	Username	Active
Edit	Ganesh gelli	ggall	ggall@gmail.com	✓

## 9.USERS

In Salesforce, a user is an employee with a unique account that controls their access to features and records.

**-Create User:** To create a user in Salesforce, go to "Setup", select "New User", fill in details, and save.

The screenshot shows the 'User Edit' page for a user named 'sandeep gujja'. The page is titled 'Users' with a 'SETUP' icon. Below the title, there are buttons for 'Save', 'Save & New', and 'Cancel'. The 'General Information' section includes fields for First Name (sandeep), Last Name (gujja), Alias (sguj), Email (sandeep@gmail.com), Username (gsanguju@gmail.com), Nickname (guju), Title, Company, Department, and Division. The 'Role' is set to 'CEO', 'User License' is 'Salesforce', and 'Profile' is 'Custom User'. The 'Active' checkbox is checked. There are also checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', and 'Site.com Contributor User'.

**-Create Another User:** Create a new user in Salesforce with the role of Marketing and profile as Custom Platform User1, then save.

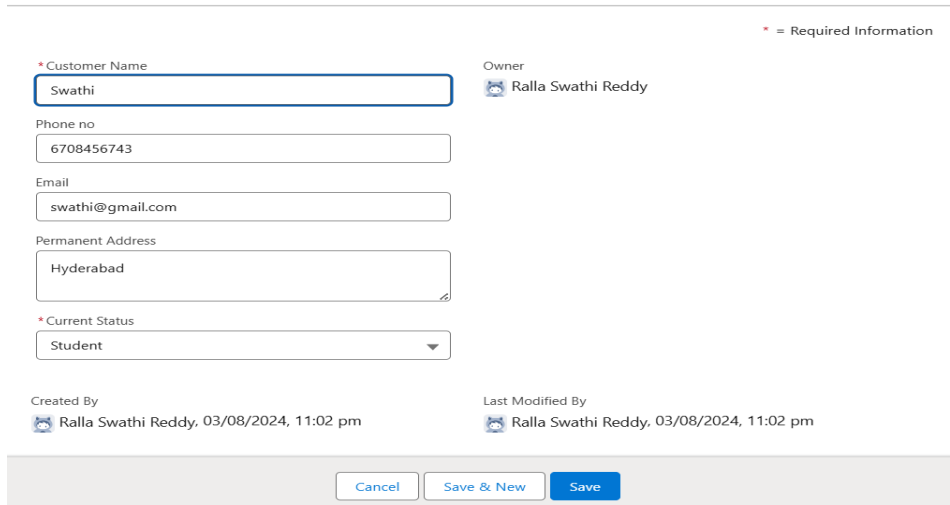
The screenshot shows the 'User Edit' page for a user named 'Abhilash garapati'. The page is titled 'Users' with a 'SETUP' icon. Below the title, there are buttons for 'Save', 'Save & New', and 'Cancel'. The 'General Information' section includes fields for First Name (Abhilash), Last Name (garapati), Alias (gara), Email (abhi@gmail.com), Username (abhigara@gmail.com), Nickname (garaabhi), Title, Company, Department, and Division. The 'Role' is set to 'Marketing', 'User License' is 'Salesforce Platform', and 'Profile' is 'Custom platform User1'. The 'Active' checkbox is checked. There are also checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', and 'Data.com User'.

**-Create Another User:** Create a new user in Salesforce with the role of Receptionist and profile as Custom Platform user2, then save.

The screenshot shows the 'User Edit' page for a user named 'Ganesh gelli'. The page is titled 'Users' with a 'SETUP' icon. Below the title, there are buttons for 'Save', 'Save & New', and 'Cancel'. The 'General Information' section includes fields for First Name (Ganesh), Last Name (gelli), Alias (ggelli), Email (ganesh@gmail.com), Username (ggelli@gmail.com), Nickname (ggelli), Title, Company, Department, and Division. The 'Role' is set to 'Receptionist', 'User License' is 'Salesforce Platform', and 'Profile' is 'Custom platform User2'. The 'Active' checkbox is checked. There are also checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', and 'Site.com Contributor User'.

## 10.USER ADOPTION

**-Create A Record (Customers):** To create a customer record in Salesforce, click "App Launcher", search for "Co-Living", go to the "Customers" tab, click "New", fill in the details, and save.

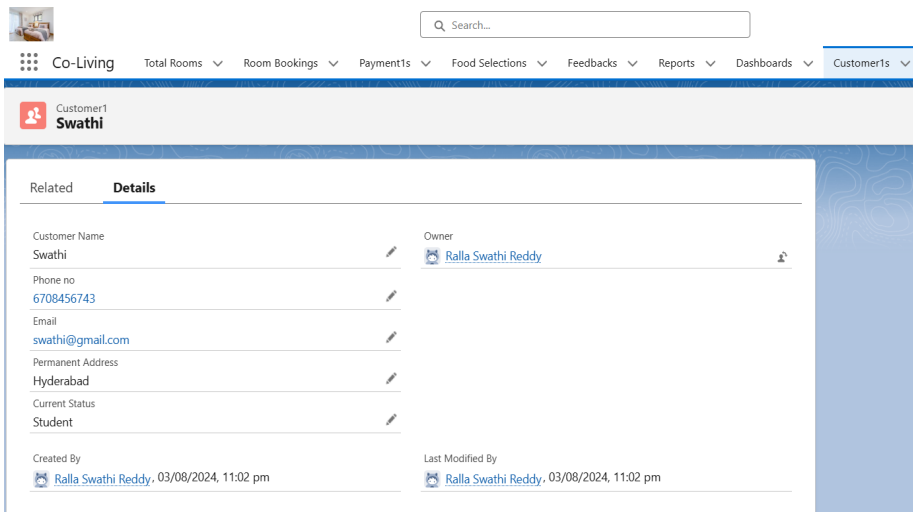


The screenshot shows the 'New Customer' form in Salesforce. The form includes the following fields and information:

- \* Customer Name:** Swathi
- Phone no:** 6708456743
- Email:** swathi@gmail.com
- Permanent Address:** Hyderabad
- \* Current Status:** Student (dropdown menu)
- Owner:** Ralla Swathi Reddy
- Created By:** Ralla Swathi Reddy, 03/08/2024, 11:02 pm
- Last Modified By:** Ralla Swathi Reddy, 03/08/2024, 11:02 pm

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

**-View A Record(Customers):** View a customer record by selecting "Co-Living" in "App Launcher", go to "Customer" tab, and click a record name.



The screenshot shows the 'Customer Details' record for 'Swathi' in Salesforce. The record includes the following information:

- Customer Name:** Swathi
- Phone no:** 6708456743
- Email:** swathi@gmail.com
- Permanent Address:** Hyderabad
- Current Status:** Student
- Owner:** Ralla Swathi Reddy
- Created By:** Ralla Swathi Reddy, 03/08/2024, 11:02 pm
- Last Modified By:** Ralla Swathi Reddy, 03/08/2024, 11:02 pm

The record is displayed in a table format with a 'Details' tab selected. The table has columns for 'Related' and 'Details'.

**-Delete A Record(Customers):** To delete a customer record in Salesforce, select "Co-Living" in "App Launcher", go to the "Customers" tab, click the arrow next to the record, and choose "Delete". Confirm by clicking "Delete" again.



## 11.REPORTS

Reports in Salesforce allow you to analyze, display, and share your data in various formats, providing valuable insights.

**-Create Report:** To create a report in Salesforce, go to the "Reports" tab, click "New Report", choose the report type "Customers with Room Bookings with Total Rooms", and click "Start Report". Customize by adding fields from the left pane, then save or run the report.

REPORT ▼  
Room Booking Report / Customers with Room Bookings and Total Rooms

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Customer: Customer Name	Current Status	Email	Permanent Address	AC-3000	Advance Payment for 1 Month	Amount	Room Sharing	Phone no	Room Booking: Room No
Ganesh	Student	ganesh@gmail.com	Hyderabad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹7,000	Double sharing	9876587650	RN-003
	Student	ganesh@gmail.com	Hyderabad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	Single sharing	9876587650	RN-008
	Student	ganesh@gmail.com	Hyderabad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹30,000	Double sharing	9876587650	RN-010
Subtotal				3	3	₹37,000			
Prasad	Student	prasad@gmail.com	Hyderabad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	Single sharing	6543870987	RN-007
	Student	prasad@gmail.com	Hyderabad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹4,000	Single sharing	6543870987	RN-005
Subtotal				2	2	₹4,000			
Sandeep	Student	sandeep@gmail.com	Hyderabad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹8,000	Triple sharing	3688945609	RN-004
Subtotal				1	1	₹8,000			
Suman	Student	suman@gmail.com	Hyderabad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹9,000	Double sharing	7698340976	RN-006
Subtotal				1	1	₹9,000			
Swathi	Student	swathi@gmail.com	Hyderabad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹6,000	Single sharing	6708456743	RN-002
	Student	swathi@gmail.com	Hyderabad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹4,566	Single sharing	6708456743	RN-001
	Student	swathi@gmail.com	Hyderabad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹34,000	Single sharing	6708456743	RN-009
Subtotal				3	3	₹44,566			
Total				10	10	₹1,02,566			

**-Create Another Report:** In Salesforce, to create a report, go to the "Reports" tab, click "New Report", choose "Customer with Room Booking with Payments," customize by adding fields, and then save or run it.

REPORT ▼  
Room Booking With Payments / Customer with Room Booking with Payments

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

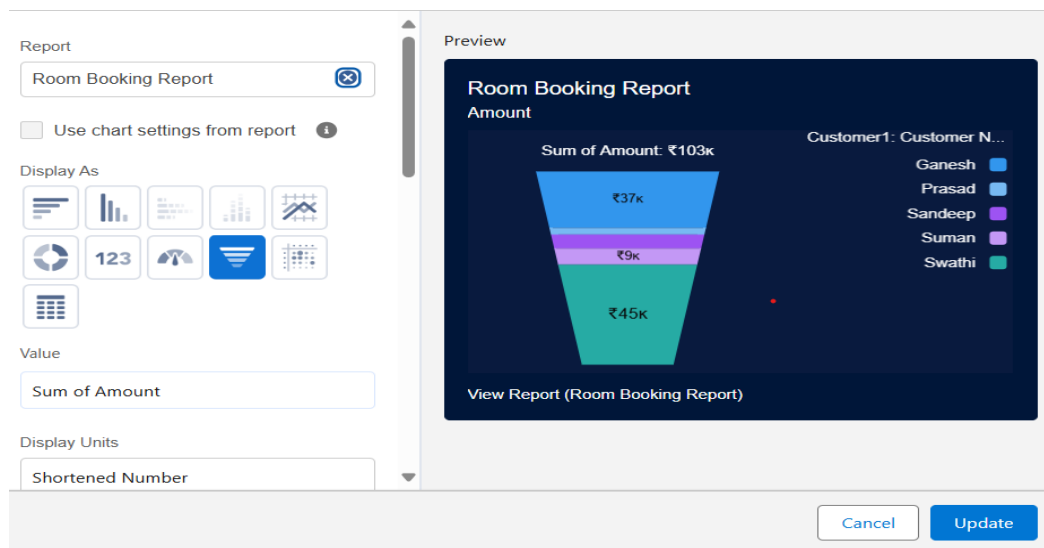
Customer: Customer Name	Payment: Payment No	Room Booking: Room No	Email	Permanent Address	Current Status	Amount	Room Booking: AC-3000
Ganesh (1)	PNO-002	RN-001	ganesh@gmail.com	Hyderabad	Student	₹4,566.00	<input checked="" type="checkbox"/>
	Subtotal					₹4,566.00	1
Prasad (1)	PNO-004	RN-003	prasad@gmail.com	Hyderabad	Student	₹7,000.00	<input checked="" type="checkbox"/>
	Subtotal					₹7,000.00	1
Sandeep (1)	PNO-003	RN-001	sandeep@gmail.com	Hyderabad	Student	₹4,566.00	<input checked="" type="checkbox"/>
	Subtotal					₹4,566.00	1
Suman (1)	PNO-005	RN-003	suman@gmail.com	Hyderabad	Student	₹7,000.00	<input checked="" type="checkbox"/>
	Subtotal					₹7,000.00	1
Swathi (1)	PNO-001	RN-002	swathi@gmail.com	Hyderabad	Student	₹6,000.00	<input checked="" type="checkbox"/>
	Subtotal					₹6,000.00	1
Total (5)						₹29,132.00	3

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒ Conditional Formatting

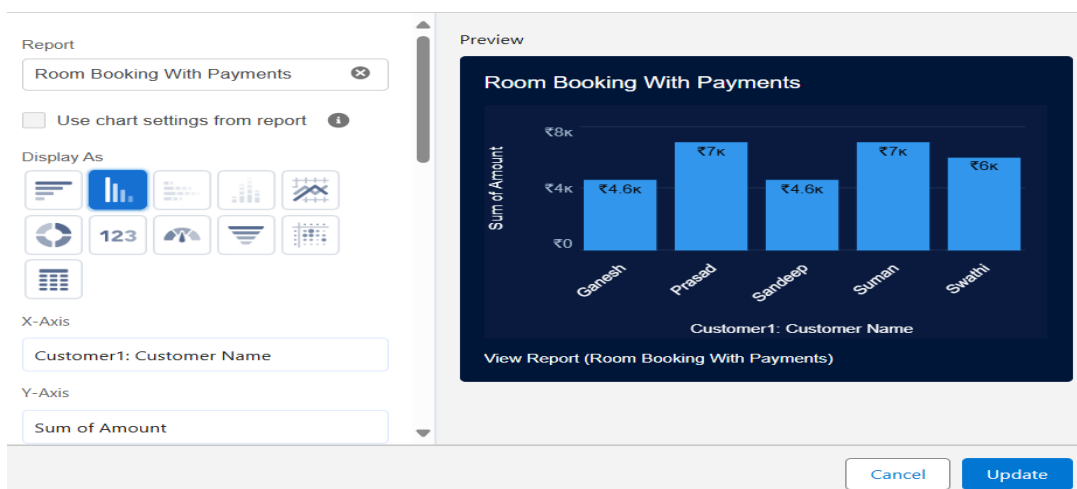
## 12.DASHBOARDS

Dashboards in Salesforce visually present real-time data from reports, helping users identify trends, measure impacts, and make informed decisions.

**-Create Dashboard:** To create a dashboard in Salesforce, go to the "Dashboards" tab, click "New Dashboard", name it and click "Create". Add a component, select the "Customer with Room Booking" report, click "Add", then "Save" and "Done".



**-Create Another Dashboard:** In Salesforce, to create a dashboard, go to the "Dashboards" tab, click "New Dashboard", name it, click "Create", add a component with the "Customer with Room Booking with Payments" report, then click "Add", "Save", and "Done".

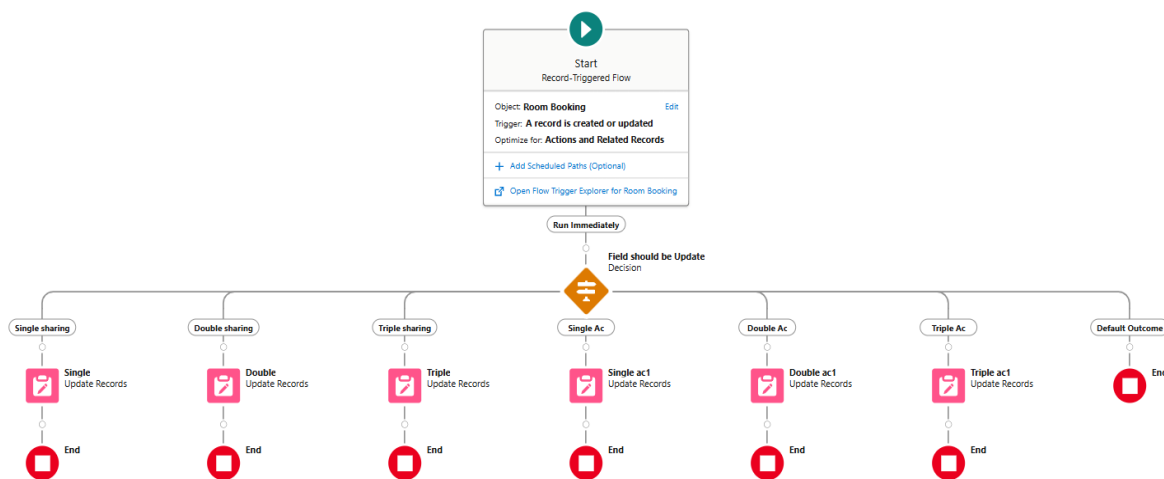


## 13.FLOWS

In Salesforce, a flow automates business processes, collects and updates data, and guides users through steps using a visual interface, requiring no coding knowledge.

### -Create A Flow:

1. Create a "Record-Triggered Flow" for "Room Booking".
2. Add a "Decision Element" to "Room sharing" & "AC-3000" values.
3. Configure "Update Records" actions to adjust the "Amount" field based on each condition.
4. Save the flow with the label "Update Amount Field".



**-Test The Flow:** In the Co-living app, create a new "Room Booking" record. After saving, the "Amount" field updates automatically via the flow.

Room No  
RN-002

\* Room Sharing  
Single sharing

Name  
Swathi

AC-3000  
☒

Advance Payment for 1 Month  
☒

Amount

Total No Of Rooms  
1

Rooms Available  
24  
This field is calculated upon save

Check in  
☒

Check Out  
☒

Created By

Co-Living Total Rooms Room Bookings Payment1s

Room Booking  
RN-002

Room No  
RN-002

Room Sharing  
Single sharing

Name  
Swathi

AC-3000  
☒

Advance Payment for 1 Month  
☒

Amount  
₹6,000

Total No Of Rooms  
1

Rooms Available  
24

Check in  
☒

Check Out  
☒

Created By  
Ralla Swathi Reddy, 03/08/2024, 11:16 pm