

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



**NAME:**Karri.Bhavana

**EMAIL:**karribhavana941@gmail.com

## **PROJECT ABSTRACT:**

the coliving space project aims to create a vibrant and inclusive community where individuals can live ,work and connect with like minded people we believe that living together in ashared environment fosters collabration reduces isolation and enhances the over all quality of life.

the coliving space will feature a carefully designed layout that balances privacy and communal areas .Coliving space is an application where customer details is stored in

order to choose the different ac rooms with multipe sharing . special food items will be selected by the user in daily and make payments in different modes and also give the feedback of service room cleaning ,interet connection and foods etc....

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# Task1 Salesforce

## Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

## 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.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

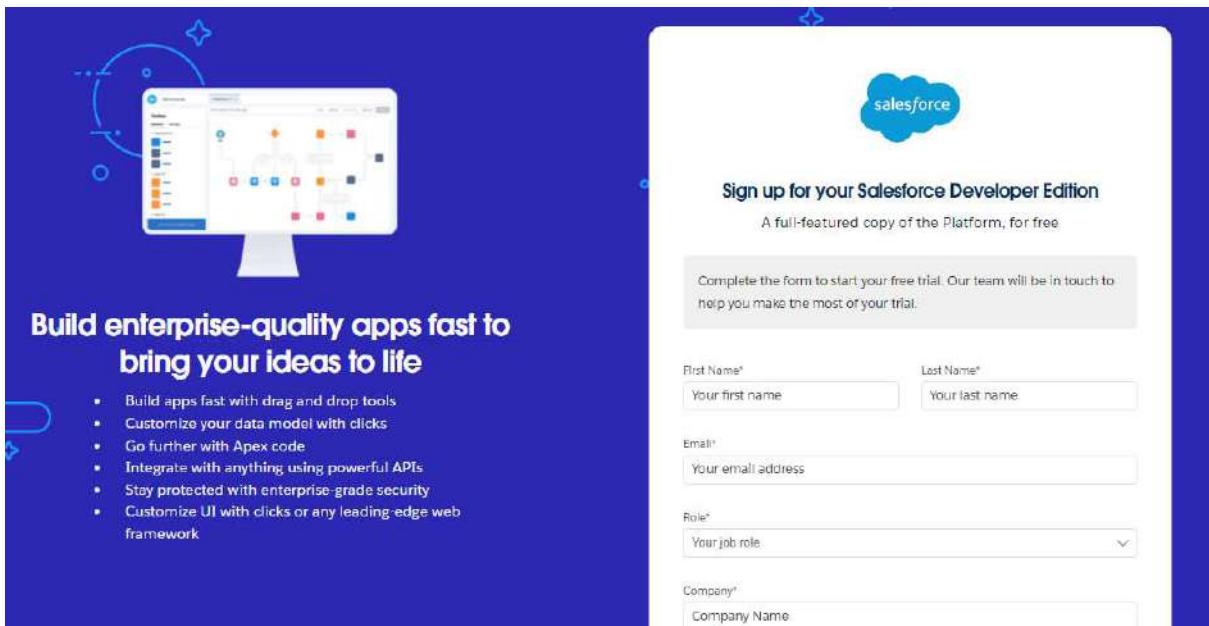
<https://youtu.be/r9EX3lGde5k>

## ACTIVITY 1:

### Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

Username : should be a combination of your name and company

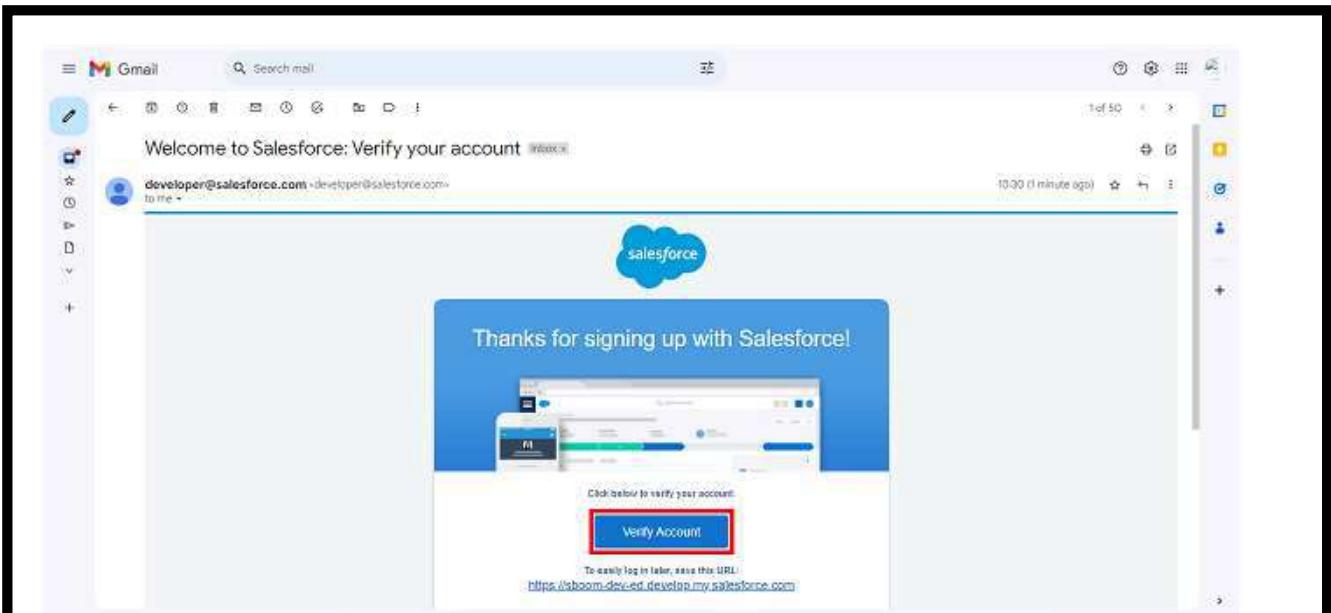
This need not be an actual email id, you can give anything in the format :  
username@organization.com

Click on sign me up after filling these.

## ACTIVITY2:

### Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account

3. Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for lead@sb.oom.  
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password

..... Good

\* Confirm New Password

..... Match

Security Question

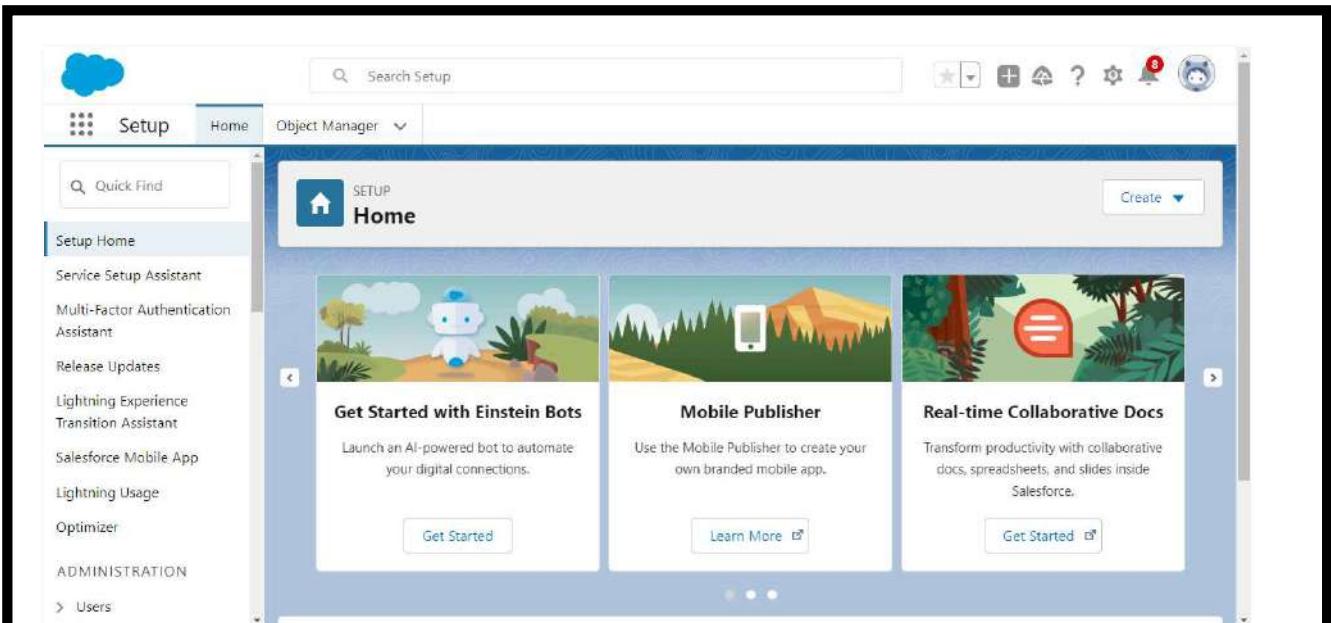
In what city were you born?

\* Answer

asdfghijkl

Change Password

4. when you will redirect to your salesforce setup page.



## TASK2:

### Object

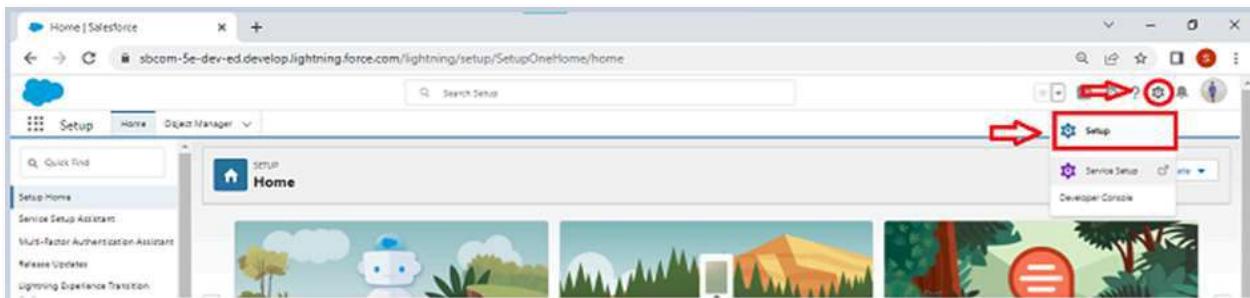
#### What Is an Object?

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 those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

To Navigate to Setup page:

Click on gear icon ? click setup.



Objects and fields involved in Co-Living:

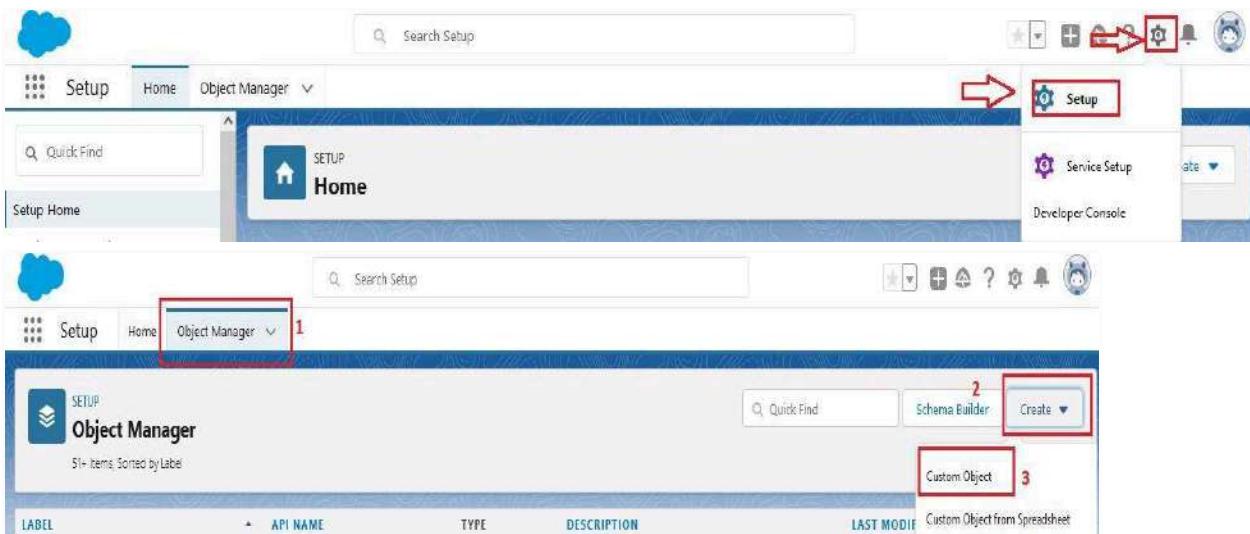
## ACTIVITY1:

### Create a custom object for Total Rooms

#### Create a custom object for Total Rooms:

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.



3. Fill in the label as "Total Room".
4. Fill in the plural label as "Total Rooms".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

The screenshot shows the 'New Custom Object' setup page in Salesforce. The page has several sections:

- Custom Object Information:** Shows the label 'Total Room' and plural label 'Total Rooms'. A red box highlights the 'Label' and 'Plural Label' fields.
- Object Name:** Shows the object name 'Total\_Rooms' and example 'Account'. A red box highlights the 'Object Name' field.
- Description:** An empty text area.
- Content-Sensitive Help Setting:** Options to open standard help or a Visualforce page. A red box highlights the 'Content Name' dropdown.
- Enter Record Name Label and Format:** Shows the record name 'Total No Of Rooms' and example 'Account Name'. A red box highlights the 'Record Name' field. A red arrow points to the 'Data Type' dropdown set to 'Text'.
- Optional Features:** Includes checkboxes for 'Allow Reports' (checked), 'Allow Activities' (checked), 'Track Field History' (unchecked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked). A red arrow points to the 'Allow Reports' checkbox.
- Object Classification:** Shows 'Enterprise Application' selected. A red box highlights the 'Enterprise Application' checkbox.
- Deployment Status:** Shows 'Deployed' selected. A red box highlights the 'Deployed' checkbox.
- Search Status:** Shows 'Allow Search' selected. A red arrow points to the 'Allow Search' checkbox.
- Object Creation Options:** Options to add notes and attachments or launch the new custom tab wizard. A red box highlights the 'Launch New Custom Tab Wizard after saving this custom object' checkbox.
- Action Bar:** Buttons for 'Save', 'Save & New', and 'Cancel'.

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

## ACTIVITY2:

- Fill in the plural label as " Customers ".

**Record name:** "Create a custom object for Customer

To create a custom object, follow these steps:

- From setup click on object manager.
- Click create, select custom object.
- Fill in the label as " Customer1 ".
- Customer Name"
- Select the data type as "Text".
- In the Optional Features section, select Allow Reports and Track Field History.
- In the Deployment Status section, ensure Deployed is selected.
- In the Search Status section, select Allow Search.

10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
11. Leave everything else as is, and click Save.

## ACTIVITY3:

### Create a custom object for Room Booking

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Room Booking ".
4. Fill in the plural label as " Room Bookings ".
5. Record name: "Room No "
6. Select the data type as "Auto number ".
7. Under Display format enter RN-[000]
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

## ACTIVITY4:

### Create a custom object for Payment

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Payment1".
4. Fill in the plural label as " Payments ".
5. Record name: "Payment No "
6. Select the data type as "Auto number ".
7. Under Display format enter PNO-[000]
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field

History.

10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

## ACTIVITY5:

### Create a custom object for Food Selection

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Food Selection ".
4. Fill in the plural label as " Food Selections ".
5. Record name: " Food Selection No "
6. Select the data type as "Auto number ".
7. Under Display format enter FS No-{000}
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

## ACTIVITY6:

### Create a custom object for Feedback

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Feedback ".
4. Fill in the plural label as " Feedbacks ".
5. Record name: "Feedback No "
6. Select the data type as "Auto number ".

7. Under Display format enter Fd No-{0000}
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

### TASK3:

## Tab

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

### Types of Tabs:

#### 1. Custom Tabs

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

#### 2. Web Tabs

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

#### 3. Visualforce Tabs

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

#### 4. Lightning Component Tabs

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

## 5. Lightning Page Tabs

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

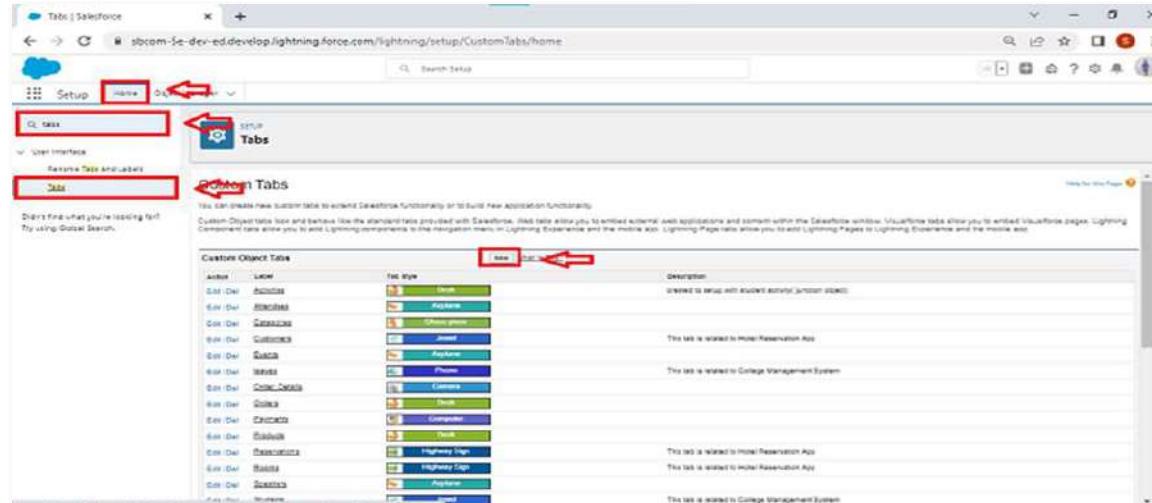
Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Creating a Tab for Total Rooms

### ACTIVITY1:

#### To create a Tab:(Total Rooms)

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



2. Select Object(Total Rooms) > Select the tab style.
3. Next (Add to profiles page) keep it as default

SETUP  
Tabs

User Profile	Action
Gold Partner User	Default On
High Volume Customer Portal	Default On
High Volume Customer Portal User	Default On
Identity User	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Salesforce API Only System Integrations	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
<b>System Administrator</b>	<b>Default On</b>

Previous Next Cancel

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

SETUP  
Tabs

Tab	Action
Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
<b>Co-Branding (Co-Branding)</b>	<b>✓</b>

Append tab to users' existing personal customizations

Previous Save Cancel

## ACTIVITY2:

### Create a Tab for Customers

To create a Tab:(Customers)

1. Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)
2. Select Object(Customers) > Select the tab style > Next (Add to profiles page) keep it as default > Next (Add to Custom App) keep it as default >

Save.

## ACTIVITY3:

### To create a Tab for Room Bookings

To create a Tab:(Room Bookings)

1. Go to setup page ? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)
2. Select Object(Room Bookings) ? Select the tab style ? Next (Add to profiles page) keep it as default ? Next (Add to Custom App) keep it as default ? Save.

### Create a Tabs For Remaining Objects

Now create the tabs for Payments, Food Selections, Feedbacks Objects.

## TASK4:

### The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps 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.

## ACTIVITY1:

### Create a Lightning App

**To create a lightning app page:**

1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.

The screenshot shows the Salesforce App Manager interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. Below the tabs, there are two red boxes: one on the left labeled 'App Manager' and another on the right labeled 'New Lightning App'. A red arrow points from the 'New Lightning App' tab towards the 'New Lightning App' button located at the bottom right of the main content area.

Lightning Experience App Manager

New Lightning App

New Connected App

Cloud (AppExchange)

Enable App Cloning

App Name	Developer Name	Description	Last Modified	Type
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
2 Analytics Studio	Analytics	Analytics Studio	04/12/2022, 10:13 am	Classic
3 App Launcher	AppLauncher	App Launcher Beta	04/12/2022, 10:13 am	Classic
4 App Solutions	AppSolutions	Discover and manage business solutions designed for your industry	04/12/2022, 10:13 am	Lightning
5 Chatter Desktop	ChatterDesktop	Chatter Desktop is an native mobile-based desktop application that lets Chatter users stay connected to their Chatter feed on the go. Use it to view feed, post comments, and more.	03/12/2022, 4:04 pm	Connected (Managed)
6 Chatter Mobile for BlackBerry	ChatterMobileForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed, post comments, and more.	23/12/2022, 4:05 pm	Lightning
7 College Management System	CMSSystem	College management system	08/12/2022, 4:16 pm	Lightning
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic
9 Contact	Contact	Salesforce CRM Contact	04/12/2022, 10:13 am	Classic
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage quotas.	04/12/2022, 10:13 am	Lightning

2. 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.

The screenshot shows the 'New Lightning App' configuration page. The title is 'New Lightning App'. Below it is the 'App Details & Branding' section. On the left, there's a red box around the 'Name your app...' input field. On the right, there's a red box around the 'Primary Color Hex Value' field, which contains '#007002'. At the bottom right, there's a red box around the 'Next' button.

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

Name your app...

\*Developer Name  Enter a developer name...

Description  Enter a description...

App Branding

Image  Upload

Primary Color Hex Value  #007002

Org Theme Options  Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

3. To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers, Room Booking, Payments, Food selection, Feedbacks, Reports and Dashboards) from the search bar and move it using the arrow button > Next.

**App Settings**

**Navigation Items** 1

**Available Items** 2

**Selected Items** 4

#### 4. To Add User Profiles:

**New Lightning App**

**User Profiles**

**Available Profiles**

**Selected Profiles**

**Save & Finish**

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

## TASK5:

# Fields & Relationships

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 become simpler and quicker.

### Types of Fields

1. Standard Fields
2. 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,

1. Created By
2. Owner
3. Last Modified
4. 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 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 depends on the user, and he can add/remove Custom Fields of any given form.

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### **Custom Fields:**

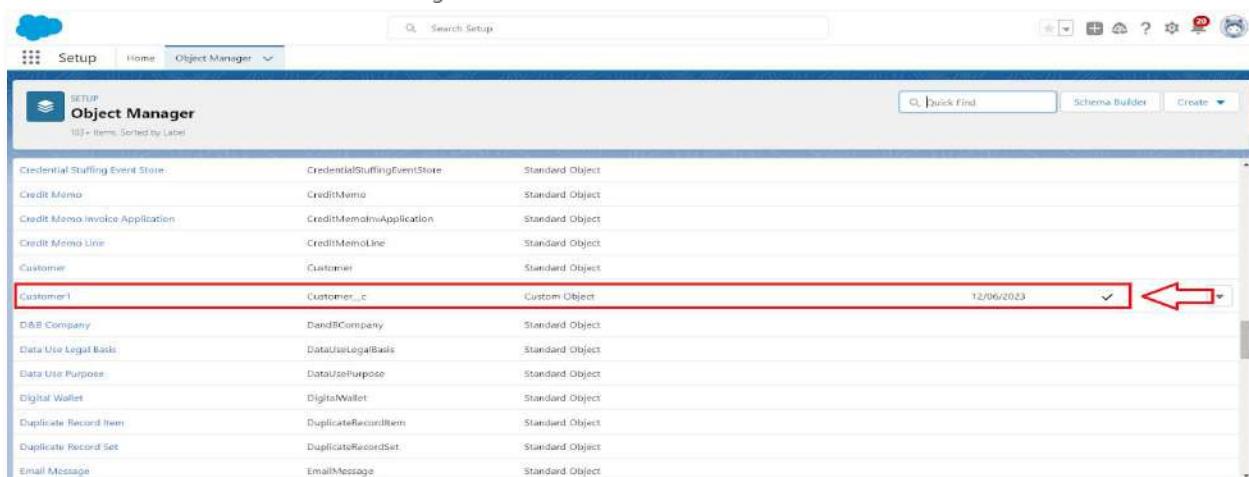
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### **ACTIVITY1:**

## **Creation of fields for the customer1 object**

### **1. To create fields in an object:**

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



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'SETUP', 'Home', 'Object Manager', and a search bar labeled 'Search Setup'. Below the header, the title 'Object Manager' is displayed with a note '103+ items. Sorted by Label'. A red box highlights the row for 'Customer1'. The 'Customer1' row contains the label 'Customer1', the API name 'Customer\_\_c', and the object type 'Custom Object'. To the right of the API name is a date field set to '12/06/2023' with a dropdown arrow. A red arrow points to this dropdown arrow. The rest of the table lists various standard objects like Credential Stuffing Event Store, Credit Memo, etc.

Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object
Credit Memo	CreditMemo	Standard Object
Credit Memo Invoice Application	CreditMemoInvoiceApplication	Standard Object
Credit Memo Line	CreditMemoLine	Standard Object
Customer	Customer	Standard Object
<b>Customer1</b>	<b>Customer__c</b>	<b>Custom Object</b>
D&B Company	DandBCompany	Standard Object
Data Use Legal Basis	DataUseLegalBasis	Standard Object
Data Use Purpose	DataUsePurpose	Standard Object
Digital Wallet	DigitalWallet	Standard Object
Duplicate Record Item	DuplicateRecordItem	Standard Object
Duplicate Record Set	DuplicateRecordSet	Standard Object
Email Message	EmailMessage	Standard Object

2. Now click on "Fields & Relationships" > New

Customer1

**Fields & Relationships**

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 Id	Email_Id_c	Email (Unique)		✓
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		

### 3. Select Data Type as a "Phone"

**Fields & Relationships**

- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) (S)
- Time
- URL

Allows users to enter a phone or other currency attribute and automatically formats the field as a currency attribute. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a pop-up calendar.

Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations, including latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

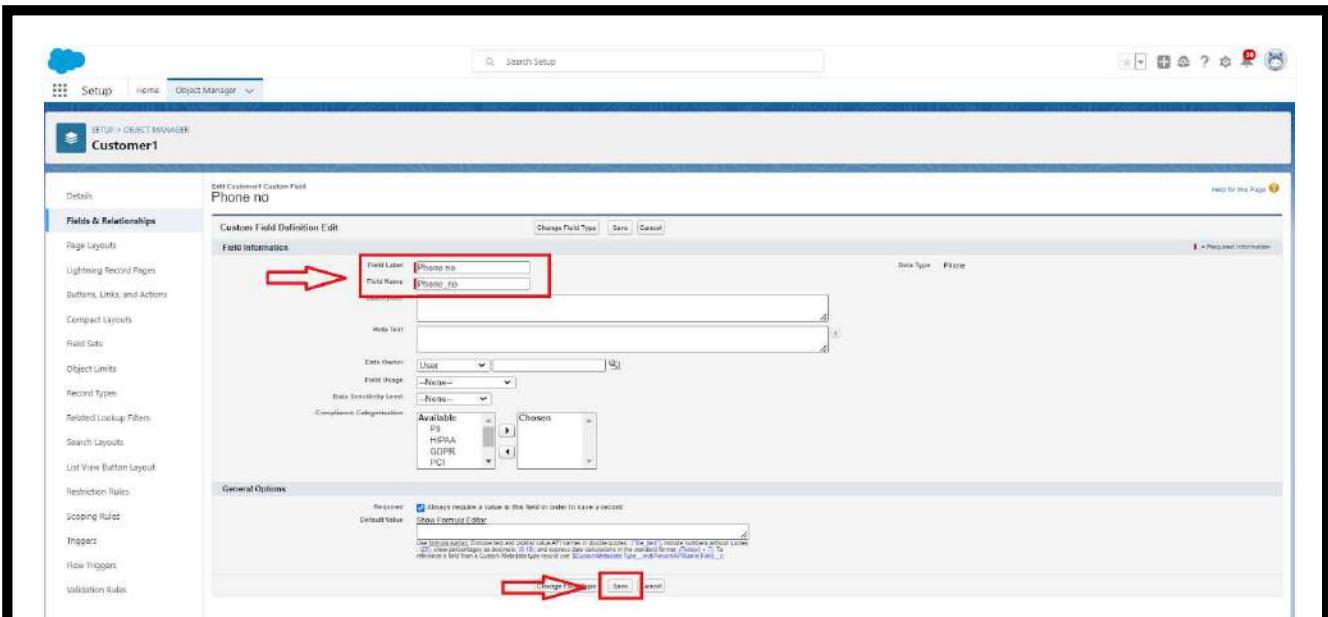
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:56.600' are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

### 4. Click on next



5. Fill the Above as following:

1. Field Label: Phone no
2. Field Name : gets auto generated
3. Click on Next > Next > Save and new.

## 2. To create another fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
  - Field Label: Email
  - Field Name :It's . gets auto generated
  - Click on Next > Next > Save and new.

## 3. To create another fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > 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:
  - Field Label: Permanent Address
  - Field Name : It's gets auto generated
  - Click on Next > Next > Save and new.

#### **4. To create another fields in an object:**

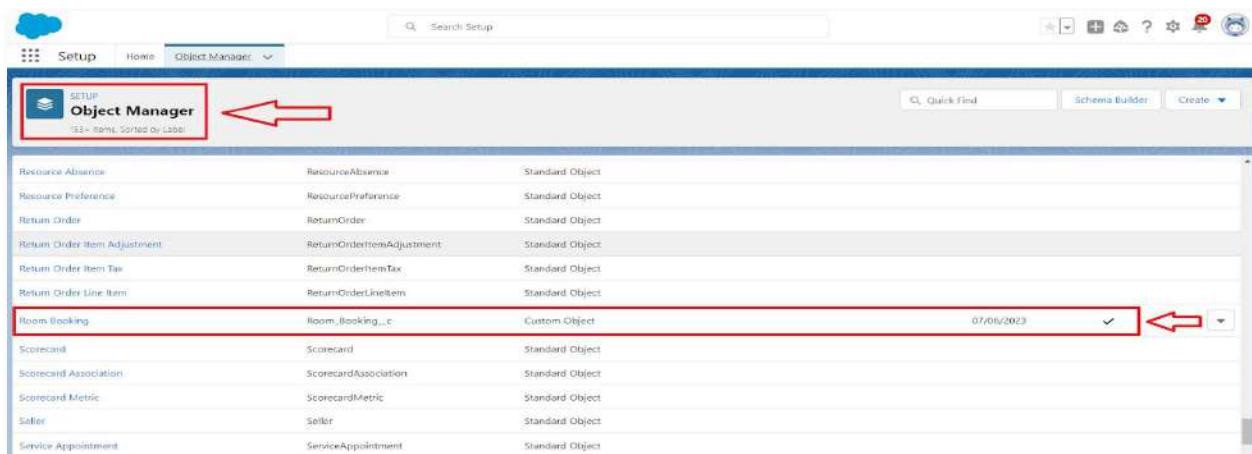
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Picklist” and Click on Next
4. Fill the Above as following:
  - Field Label: Current Status
  - Value - Select enter values with each value separated by a new line
1. Student
2. Employee
3. Others
- Select required
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

## **ACTIVITY2:**

### **Creation of fields for the Room Booking object**

#### **1. To create fields in an object:**

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



The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup' and 'Object Manager'. Below this is a search bar labeled 'Search Setup'. The main area displays a list of objects. The 'Room Booking' object is highlighted with a red box and a red arrow pointing to it from the left. The 'Room Booking' row contains three columns: 'Name' (Room Booking), 'Label' (Room\_Booking\_\_c), and 'Type' (Custom Object). A date field 'Created Date' shows '07/06/2023'. Another red arrow points to the dropdown menu next to the 'Created Date' field.

Name	Label	Type
Resource Absence	ResourceAbsence	Standard Object
Resource Preference	ResourcePreference	Standard Object
Return Order	ReturnOrder	Standard Object
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object
Return Order Item Tax	ReturnOrderItemTax	Standard Object
Return Order Line Item	ReturnOrderLineItem	Standard Object
Room Booking	Room_Booking__c	Custom Object
Scorecard	Scorecard	Standard Object
Scorecard Association	ScorecardAssociation	Standard Object
Scorecard Metric	ScorecardMetric	Standard Object
Seller	Seller	Standard Object
Service Appointment	ServiceAppointment	Standard Object

2. Now click on “Fields & Relationships” > New

SETUP > OBJECT MANAGER  
Room Booking

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
AC_3000	AC__c	Checkbox		
Advance payment for 1month	Advance_payment_for_1month__c	Checkbox		
Amount	Amount__c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer)	✓	
Room No	Name	Auto Number	✓	

### 3. Select Data Type as a “Picklist”

SETUP > OBJECT MANAGER  
Room Booking

**Fields & Relationships**

**Data Types**

- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)
- Time
- URL

Allows users to select a value from a list you define

### 4. Click on Next

### 5. Fill the Above as following:

- Field Label: Room Sharing
- Value - Select enter values with each value separated by a new line
  1. Single sharing
  2. Double sharing
  3. Triple sharing
- Select required
- Click on Next > Next > Save and new.

## 2. To Create a Fields & Relationship to an Room Booking Object

To create fields & relationship to an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the

search bar > click on the object.

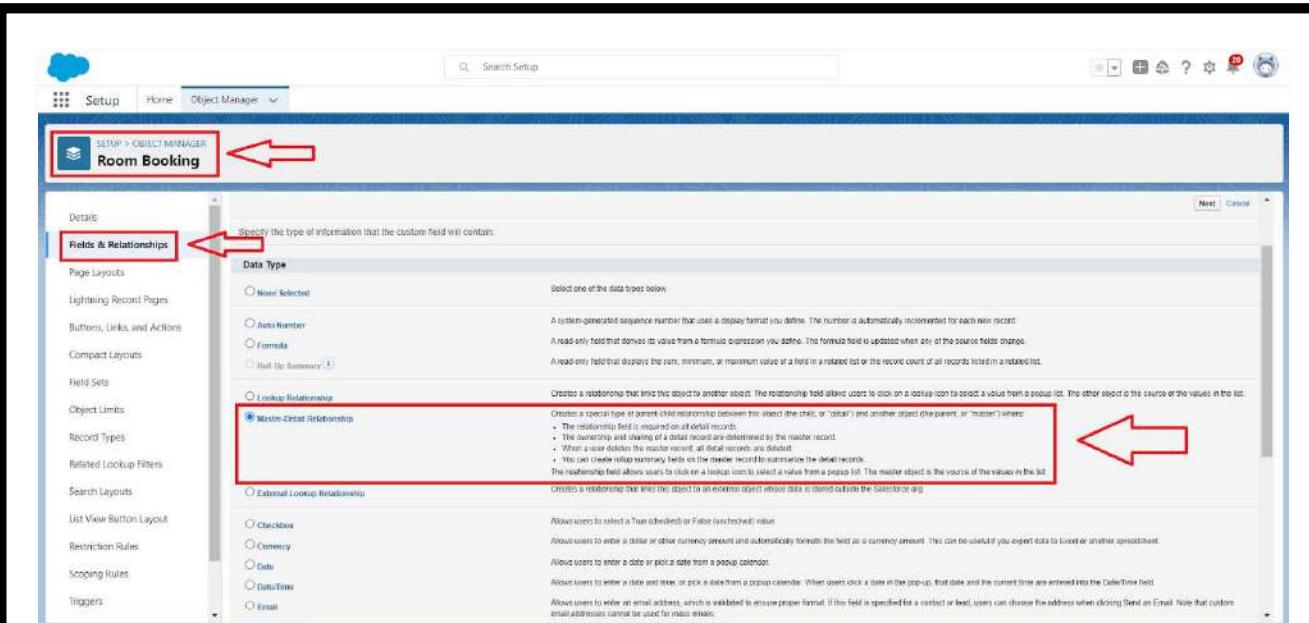
The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar labeled "Search Setup". Below it, the "Object Manager" tab is selected. A red arrow points to the "Object Manager" tab itself. Another red arrow points to the "Room Booking" row in the list, which is highlighted with a red border. The "Room Booking" row contains the label "Room Booking", the API name "Room\_Booking\_\_c", and the object type "Custom Object".

2. Now click on "Fields & Relationships" > New

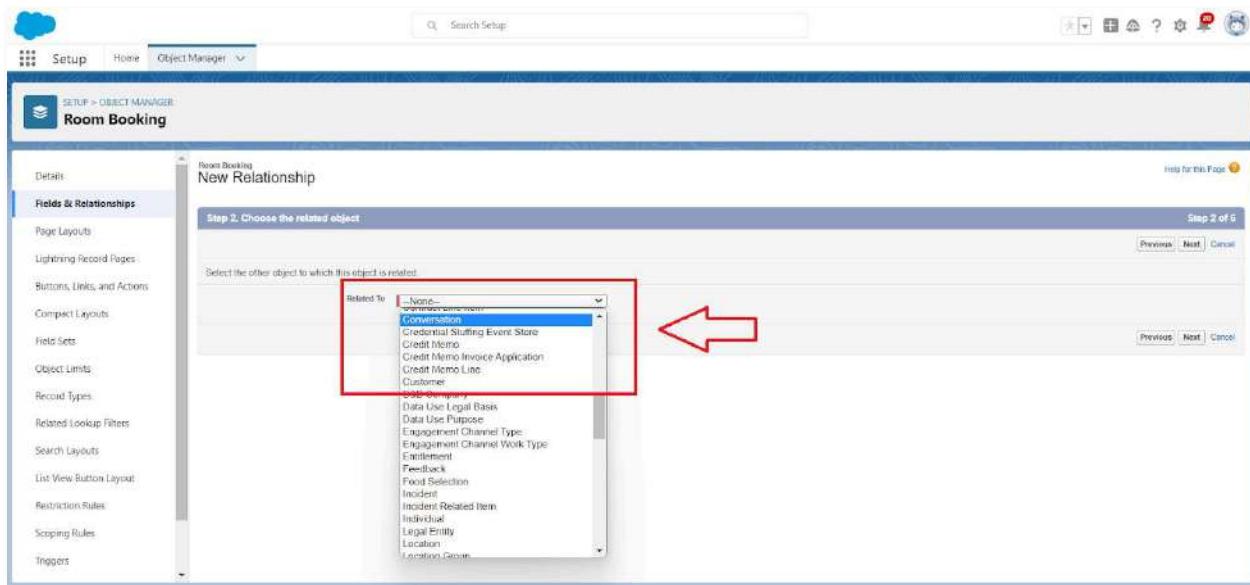
The screenshot shows the "Fields & Relationships" page for the "Room Booking" object. At the top, there is a search bar labeled "Search Setup". Below it, the "Room Booking" object is selected. A red arrow points to the "Room Booking" label. Another red arrow points to the "New" button in the top right corner of the main table area. The table has columns for "FIELD LABEL", "FIELD NAME", "DATA TYPE", "CONTROLLING FIELD", and "INDEXED". There are several rows of field definitions, such as "AC - 3000" (checkbox), "Advance payment for 1month" (checkbox), "Amount" (Currency), "Created By" (Lookup), "Last Modified By" (Lookup), "Name" (Master-Detail), and "Room No" (Auto Number).

3. Select Data Type as a "Master-detail Relationship"

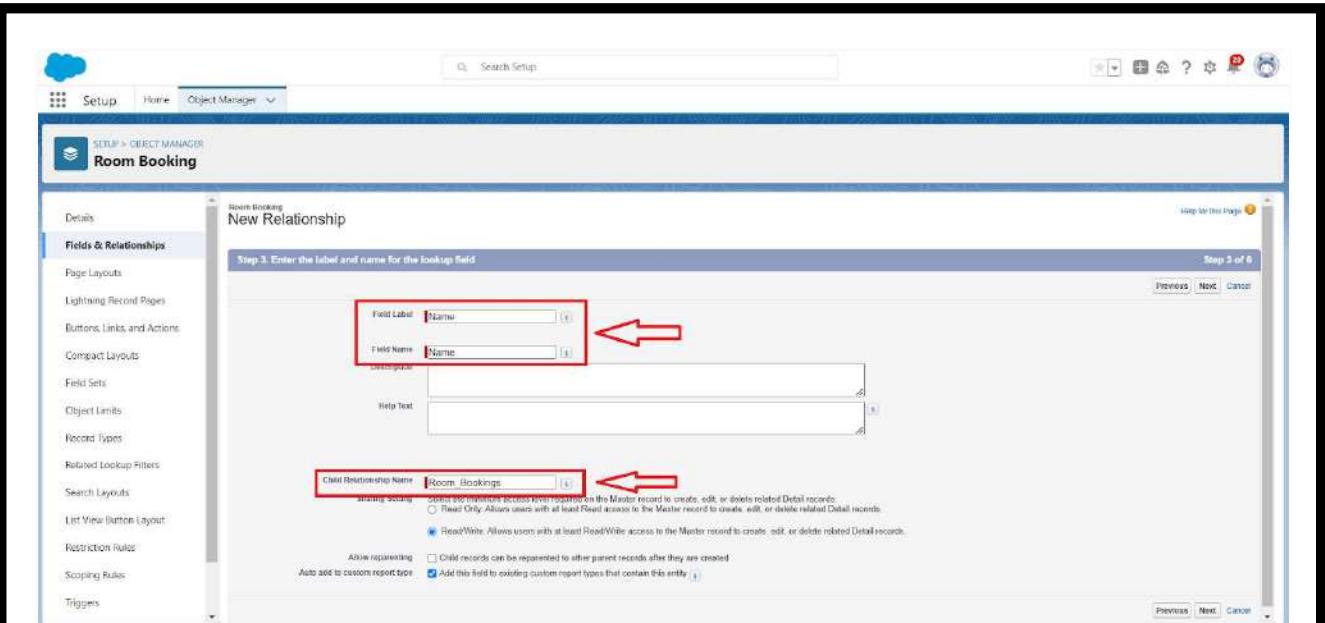
4. Click on Next



5. Click on the Related to drop down and Select the “Customer” 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.

### **3. To create fields in an object:**

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
  - Field Label: AC-3000
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new

### **4. To create fields in an object:**

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
  - Field Label: Advance Payment for 1 Month
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new

## **5. To create fields in an object:**

1. Go to setup ? click on Object Manager ? type object name(Room Booking) in the search bar ? click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Currency”
4. Click on Next
5. Fill the Above as following:
  - Field Label: Amount
  - Length: (18,0)
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new

## **6. To Create a Fields & Relationship to an Object**

1. Go to setup > click on Object Manager > type object name(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 Related to drop down and Select the “Total Rooms” object and click on Next
  - Fill the Above as following:
  - Change the Field Label: Total No Of Rooms
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new.

## **7. To Create a Rollup Summary Field in “Total Room 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 > click on the object.
3. Now click on “Fields & Relationships” ? New
4. Select Data type as a “Roll-up Summary” and Click on Next
  - Fill the Above as following:
  - Field Label: Rooms Booked
  - Field Name :It's gets auto generated
  - Click on Next

5. Select the Room Bookings in the Summarized Object
6. Select the count Radio button in the select Roll-up Type

Total Room  
New Custom Field

**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

Help for this Page

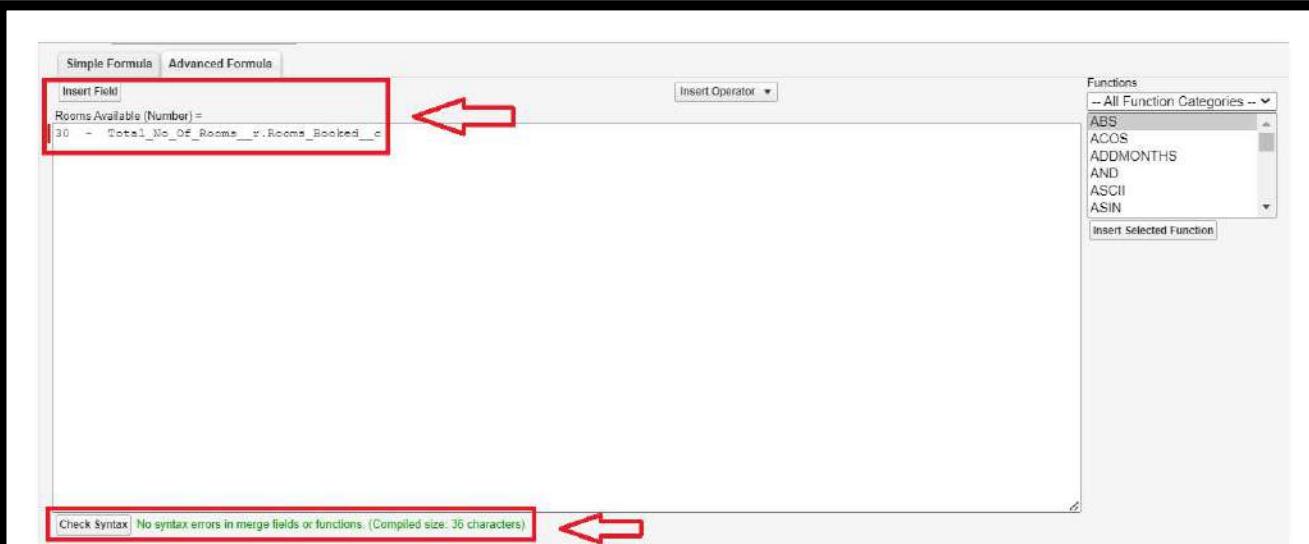
Step 3 of 5

Previous Next Cancel

7. Click on Next > Next > Save and new

## 8. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Rooms Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
  - Field Label: Rooms Available
  - Field Name : It's gets auto generated
  - Select the Formula Return Type as “Number”
  - Select the Decimal places as “0” and Click on Next
  - Click on the Advanced Formula and Enter the value in formula box “30 - ” and Click on insert field than you will find a pop window under the Room Booking select the Total No Of Rooms in the second Column and select the Room Booked in the third column and click on insert “30 - .Total\_No\_of\_Rooms\_\_r.Rooms\_Booked\_\_c ” and Check Syntax



- Click on Next > Next > Save and new.

## 9. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
  - Field Label: Check in
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new

## 10. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
  - Field Label: Check Out
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new

# ACTIVITY3:

# Creation of Fields & Relationship for Payment1 Object

## 1. To create fields & relationship to 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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar has 'Setup' and 'Object Manager' selected. A red box highlights the 'Payment1' object in the list. Below the navigation, there's a search bar and various icons. The main area is titled 'Fields & Relationships' with a sub-header '8 items. Sorted by Field Label'. It lists several fields with their field labels, names, data types, and controlling fields. A red arrow points from the 'New' button at the top right to the 'New' link in the table header. Another red box highlights the 'Fields & Relationships' link in the left sidebar.

3. Select Data Type as a "Master-detail Relationship"

The screenshot shows the 'Fields & Relationships' creation wizard for the Payment1 object. The top navigation bar has 'Setup' and 'Object Manager' selected. A red box highlights the 'Payment1' object in the list. The main area is titled 'Fields & Relationships' and shows a step titled 'Specify the type of information that the custom field will contain'. It lists several data type options: None Selected, Auto Number, Formula, Roll Up Summary, Lookup Relationship, Master-Detail Relationship (which is selected and highlighted with a red box), and External Lookup Relationship. A red arrow points from the 'Master-Detail Relationship' link in the list to its detailed description below. Another red box highlights the 'Fields & Relationships' link in the left sidebar.

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

Next

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: -None- Credit Memo Line Case DMR Company Data Use Legal Basis Data Use Payment Engagement Channel Type Engagement Channel Work Type Entitlement Feedback Food Selection Incident Incident Related Item

Help for this Page Step 2 of 6 Previous Next Cancel

Step 3. Enter the label and name for the lookup field

Field Label: Name

Field Name: Name

Description:

Help Text:

Child Relationship Name: Payments

Sharing Settings: Select the minimum access level required on the Master record to create, edit, or delete related Detail records.

Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

ReadWrite: Allows users with at least ReadWrite access to the Master record to create, edit, or delete related Detail records.

Allow reporting:  Child records can be represented to other parent records after they are created.

Auto add to existing report type:  Add this field to existing custom report types that contain this entity.

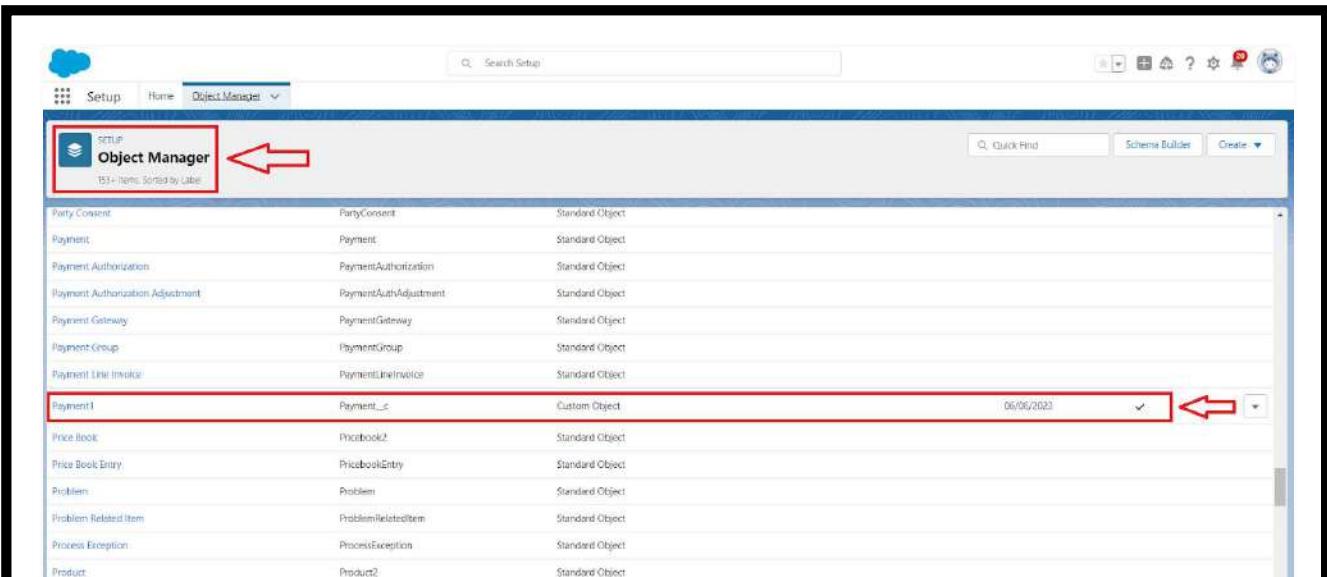
Help for this Page Step 3 of 6 Previous Next Cancel

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.

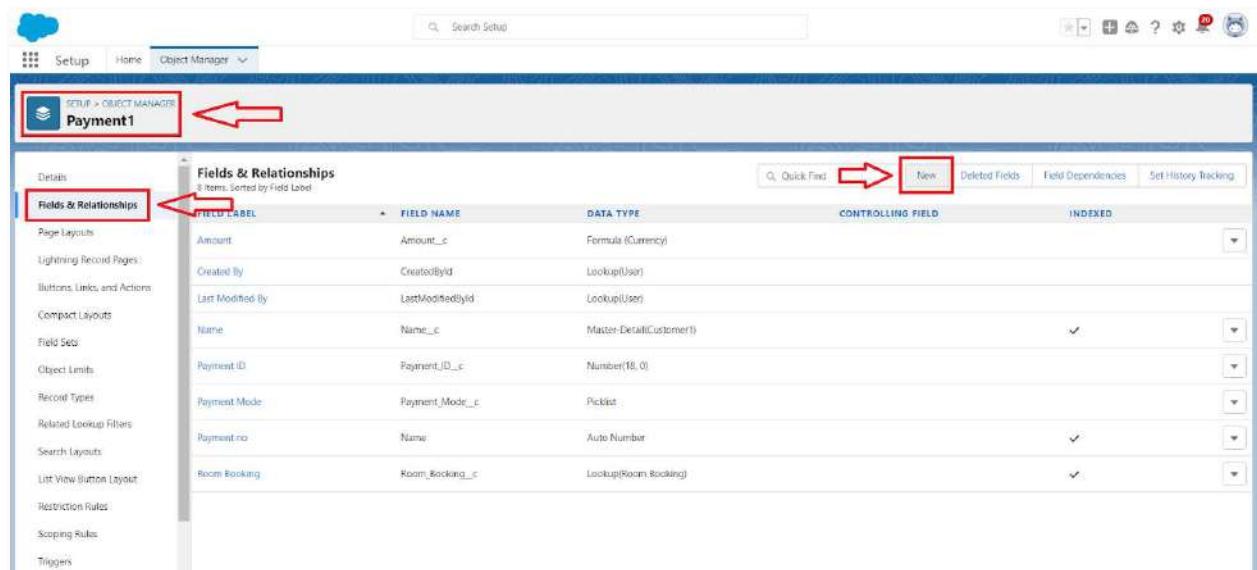
**2. To create another fields & relationship to an object:**

1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.



Party Consent	PartyConsent	Standard Object
Payment	Payment	Standard Object
Payment Authorization	PaymentAuthorization	Standard Object
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object
Payment Gateway	PaymentGateway	Standard Object
Payment Group	PaymentGroup	Standard Object
Payment Line Invoice	PaymentLineInvoice	Standard Object
<b>Payment1</b>	<b>Payment__c</b>	<b>Custom Object</b>
Price Book	Pricebook2	Standard Object
Price Book Entry	PricebookEntry	Standard Object
Problem	Problem	Standard Object
Problem Related Item	ProblemRelatedItem	Standard Object
Process Exception	ProcessException	Standard Object
Product	Product2	Standard Object

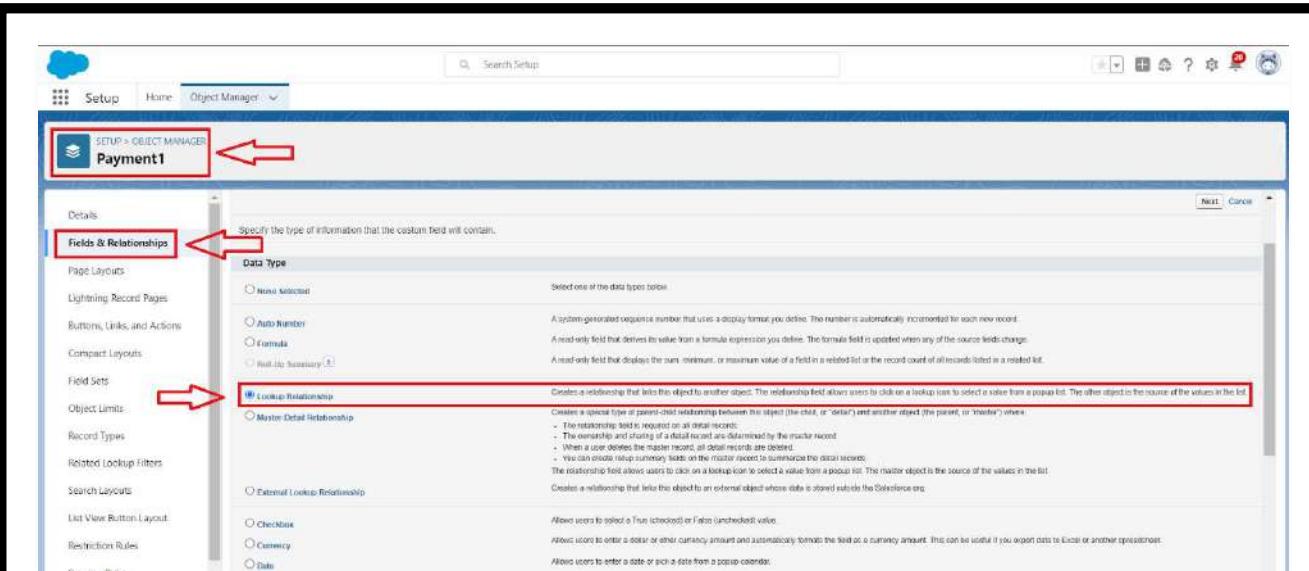
2. Now click on “Fields & Relationships” > New



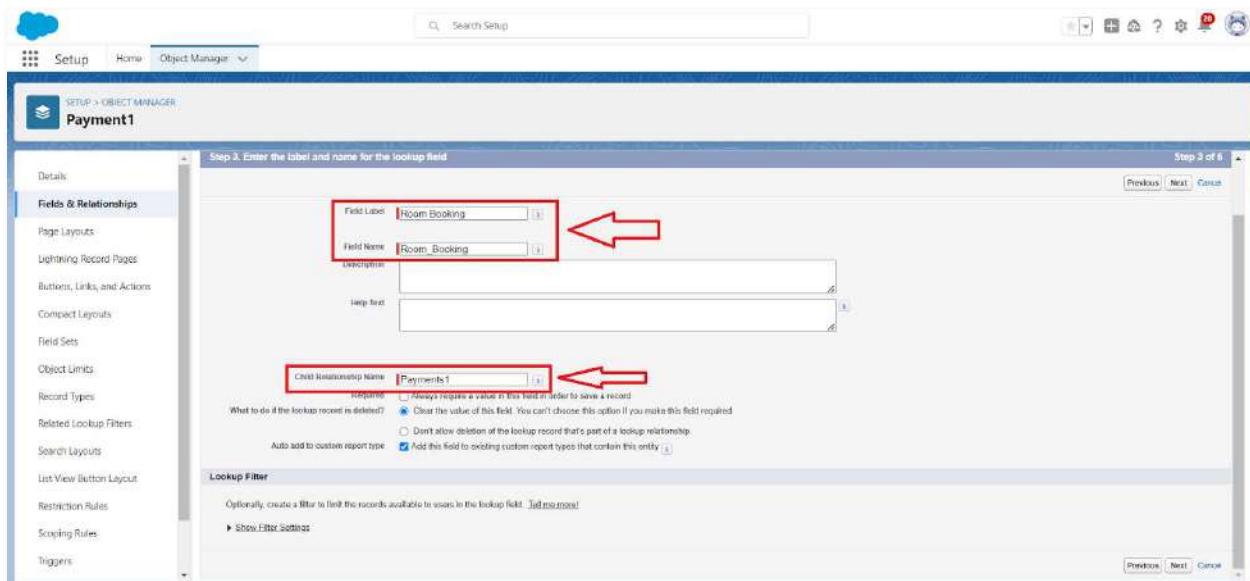
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name__c	Master-Detail(Customer)		✓
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number		✓
Room Booking	Room_Booking__c	Lookup(Room Booking)		✓

3. Select Data Type as a “Lookup Relationship”

4. Click on Next



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



6. Fill the Above as following:

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

### 3. 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.

Object	Object API Name	Type	Last Modified
Payment Authorization	PaymentAuthorization	Standard Object	
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object	
Payment Gateway	PaymentGateway	Standard Object	
Payment Group	PaymentGroup	Standard Object	
Payment Line Invoice	PaymentLineInvoice	Standard Object	
Payment	Payment_c	Custom Object	06/06/2023
Price Book	Pricebook2	Standard Object	
Price Book Entry	PricebookEntry	Standard Object	
Problem	Problem	Standard Object	
Problem Related Item	ProblemRelatedItem	Standard Object	
Process Exception	ProcessException	Standard Object	
Product	Product2	Standard Object	

2. Now click on “Fields & Relationships” > New

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”

The screenshots illustrate the configuration of the Payment1 object in Salesforce's Setup interface.

**Top Screenshot:** The 'Fields & Relationships' section is highlighted with a red box and a red arrow. The 'Picklist' option is selected, indicated by a blue checked radio button. A red box surrounds the 'Allow users to select a value from a list you define' description, and a red arrow points to the 'List' link next to it.

**Bottom Screenshot:** The 'Payment\_Mode' field configuration screen is shown. A red box highlights the 'Values' section, and a red arrow points to the 'Enter values, with each value separated by a new line' input field. The listed values include Cash, Check, Credit card, Debit card, and UPI.

4. Fill the Above as following:

  - Field Label: Payment Mode
  - Value - Select enter values with each value separated by a new line
  1. Cash
  2. Check
  3. Credit card
  4. Debit card
  5. UPI
  6. Phonepe
  7. Gpay
  8. Paytm

- Select required
- Click on Next > NEXT.

#### ACTIVITY4:

## Creation of fields for the Food Selection object

### 1. To create fields & relationship to an object:

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is highlighted with a red box and has a red arrow pointing to it from the left. Below the tabs, there is a search bar labeled 'Search Setup'. The main area displays a list of objects with columns for Name, API Name, and Object Type. The 'Food Selection' object is selected, indicated by a red box around its row and a red arrow pointing to the 'Edit' button at the end of its row.

Name	API Name	Object Type
Entitlement Contact	EntitlementContact	Standard Object
Event	Event	Standard Object
Feedback	Feedback_c	Custom Object
Finance Balance Snapshot	FinanceBalancesnapshot	Standard Object
Finance Transaction	FinanceTransaction	Standard Object
<b>Food Selection</b>	<b>Food_Selection__c</b>	<b>Custom Object</b>
Image	Image	Standard Object
Incident	Incident	Standard Object
Incident Related Item	IncidentRelatedItem	Standard Object
Individual	Individual	Standard Object
Invoice	Invoice	Standard Object
Invoice Line	InvoiceLine	Standard Object
Lead	Lead	Standard Object

2. Now click on "Fields & Relationships" > New

The screenshot shows the 'Fields & Relationships' page for the 'Food Selection' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager', with 'Object Manager' highlighted. The 'Food Selection' object is selected in the top navigation bar, indicated by a red box and a red arrow pointing to it from the left. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc., with 'Fields & Relationships' selected and highlighted with a red box. The main area displays a table of fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. A red arrow points to the 'New' button in the top right corner of the table area.

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(Customer)		✓
Select Breakfast	Select_Breakfast__c	Picklist	Breakfast	
Select dinner	Select_dinner__c	Picklist	Dinner	

3. Select Data Type as a "Master-detail Relationship"

4. Click on Next

**Food Selection**

**Data Type**

None Selected

Auto Number

Formula

Roll Up Summary

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

DateTime

Email

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

**Food Selection**

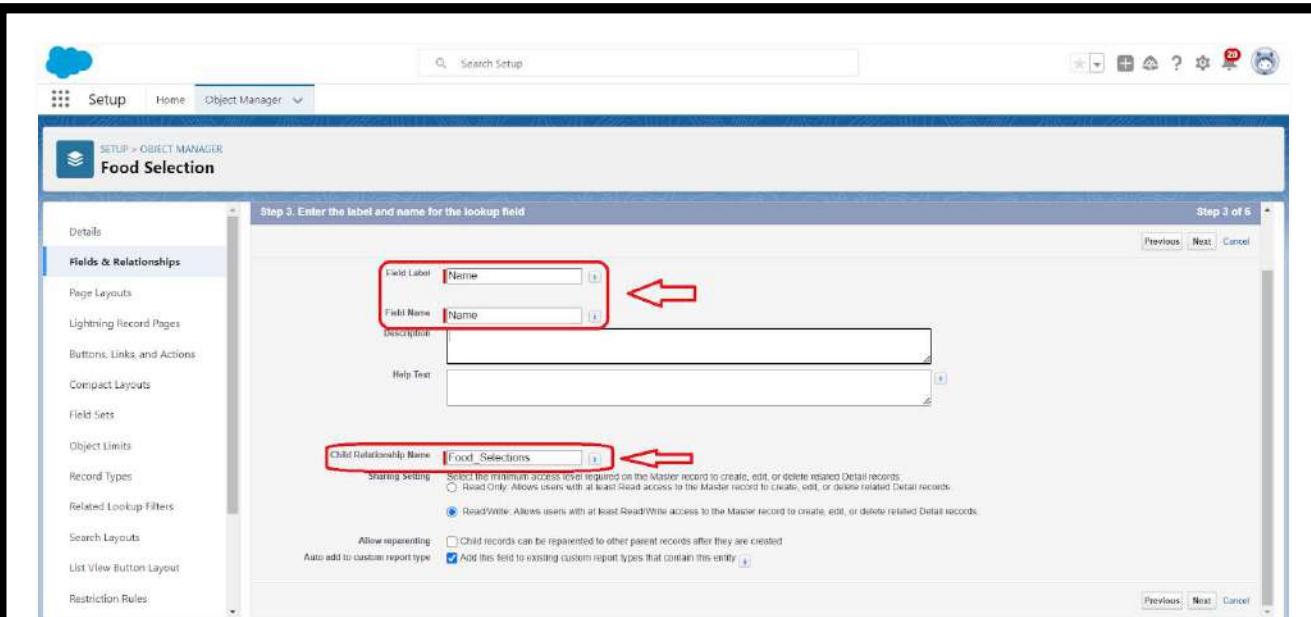
**New Relationship**

**Step 2. Choose the related object**

Select the other object to which this object has a relationship.

Related To:

- Change Request
- Change Request Related Issue
- Change Request Related Item
- Communication Subscription
- Communication Subscription Channel Type
- Communication Subscription Consent
- Communication Subscription Timing
- Contact
- Contact Point Consent
- Contact Point Type Consent
- Content Folder
- Contract
- Contract Line Item
- Conversation
- Credential Stuffing Event Store
- Credit Memo
- Credit Memo Invoice Application
- Credit Memo Line
- Customer
- D&B Company
- Document Location Record
- None-



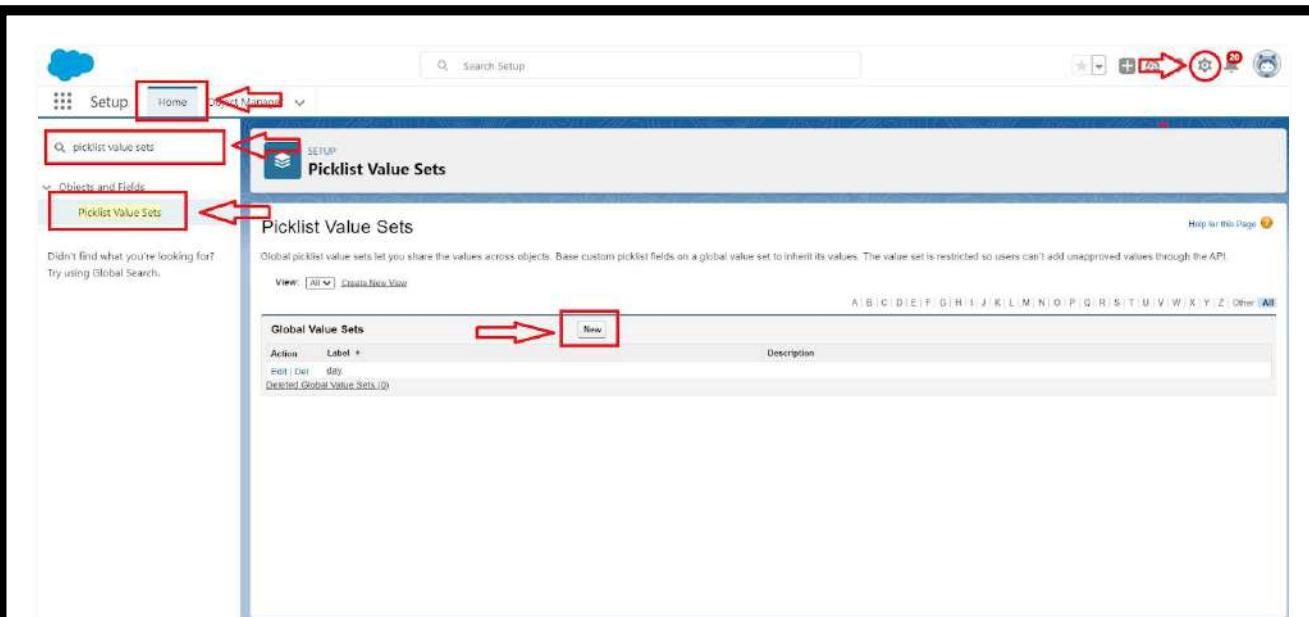
6. Fill the Above as following:
  - Change the Field Label: Name
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new.

### Picklist value sets:

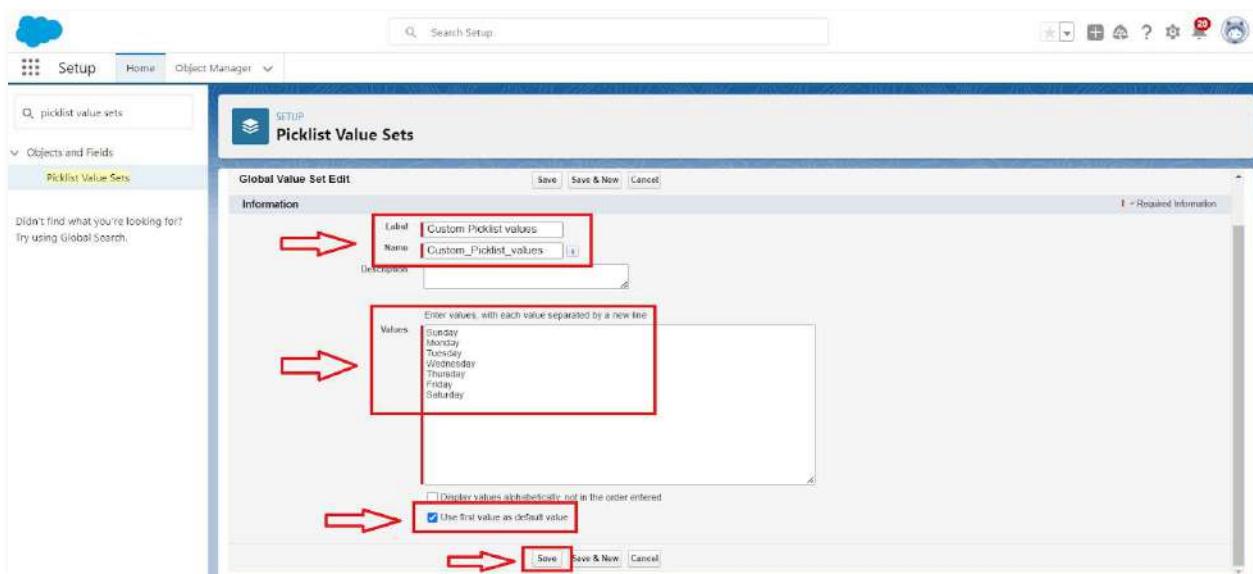
Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

### Create a picklist value set:

1. First click on gear icon and click on setup
2. Click on home tab in the Quick find box search for the " Picklist value sets "
3. Click on the Picklist value set and click on new



4. Enter the Label name and API name automatically Generate
5. Enter the values with each value separated by a new line
  - Sunday
  - Monday
  - Tuesday
  - Wednesday
  - Thursday
  - Friday
  - Saturday

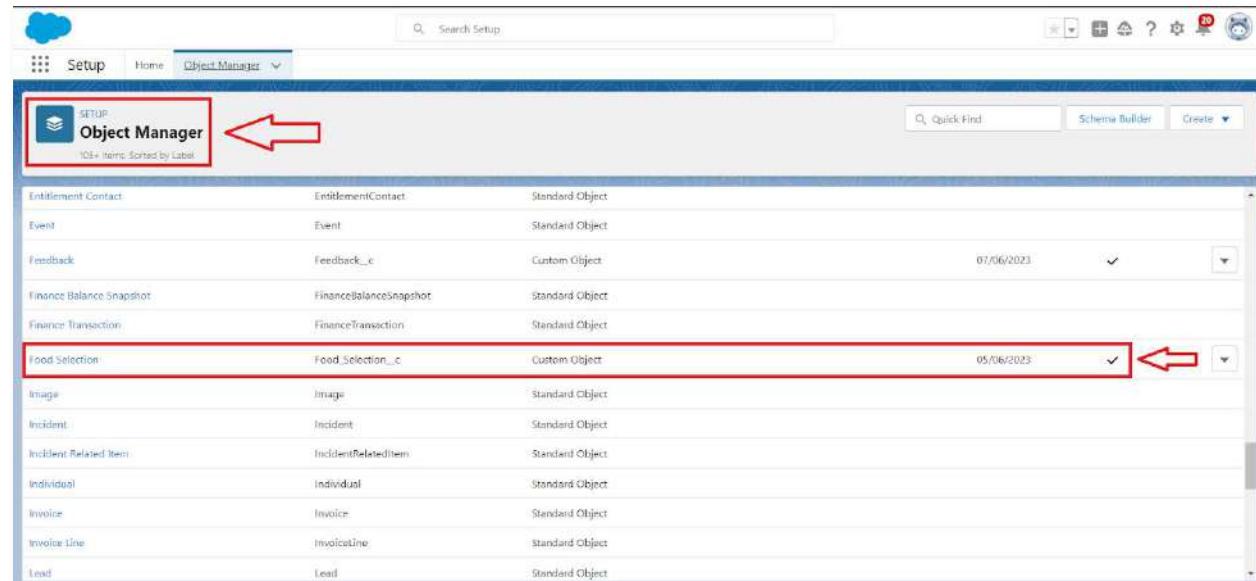


6. Check the Use first value as default value and Click on save.

## 2. Create a picklist Field for Food selection object

To create fields in an object:

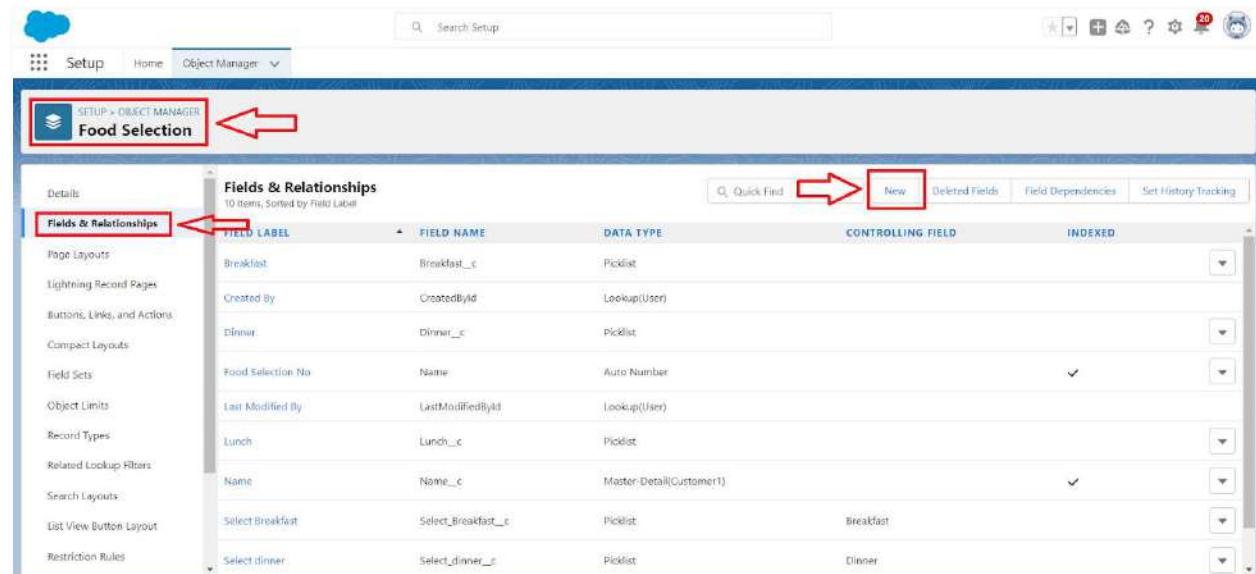
1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.



The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' button in the top left corner. Another red box highlights the 'Food Selection' row in the list, which is also selected. A red arrow points from the 'Object Manager' button towards the 'Food Selection' row.

Object Name	Object Label	Type	Created Date
Entitlement Contact	EntitlementContact	Standard Object	
Event	Event	Standard Object	
Feedback	Feedback_c	Custom Object	07/06/2023
Finance Balance Snapshot	FinanceBalancesnapshot	Standard Object	
Finance Transaction	Financetransaction	Standard Object	
<b>Food Selection</b>	<b>Food_Selection__c</b>	<b>Custom Object</b>	<b>05/06/2023</b>
Image	Image	Standard Object	
Incident	Incident	Standard Object	
Incident Related Item	IncidentRelateditem	Standard Object	
Individual	Individual	Standard Object	
Invoice	Invoice	Standard Object	
Invoice Line	InvoiceLine	Standard Object	
Lead	Lead	Standard Object	

2. Now click on "Fields & Relationships" > New



The screenshot shows the 'Fields & Relationships' page for the 'Food Selection' object. A red box highlights the 'Food Selection' object label at the top. Another red box highlights the 'Fields & Relationships' tab in the sidebar. A red arrow points from the 'Fields & Relationships' tab towards the 'New' button in the top right corner.

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	

3. Select Data Type as a "Picklist"

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

- Setup > Object Manager**
- Food Selection** is selected.
- Fields & Relationships** is highlighted in the sidebar.
- Picklist** is highlighted in the list of field types.
- Description** for Picklist: "Allows users to select a value from a list you define."
- Notes** for Picklist: "Allows users to select multiple values from a list you define." (with a note about using commas)
- Text**, **Text Area**, **Text Area (Long)**, **Text Area (Rich)**, **Text (Encrypted)**, **Time**, and **URL** are also listed.

The screenshot shows the 'New Custom Field' creation wizard:

- Step 2: Enter the details**
- Field Label:** Breakfast
- Value:**
  - Use global picklist value set
  - Enter values, with each value separated by a new line
- Field Name:** Breakfast
- Description:** (empty)
- Help Text:** (empty)
- Required:**  Always require a value in this field in order to save a record
- Auto-add to custom report template:**  Add this field to existing custom report templates that contain this entry
- Default Value:** (empty)
- Notes:** (empty)

- Fill the Above as following:
  - Field Label: Breakfast
  - Under Value - Select the Use global picklist value set
  - Under the drop down select the Custom Picklist Values
  - Select required
  - Click on Next > Next > Save and new.

### 3. Create a another picklist Field for Food selection object

To create fields in an object :

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

2.

The screenshot shows the Salesforce Object Manager page. A red box highlights the 'Object Manager' button in the top left, and a red arrow points to it from the left. Another red box highlights the 'Food Selection' row in the list, and a red arrow points to the last column of this row from the right.

Object Label	Object Name	Type	Last Modified
Entitlement Contact	EntitlementContact	Standard Object	
Event	Event	Standard Object	
Feedback	Feedback_c	Custom Object	07/06/2023
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object	
Finance Transaction	FinanceTransaction	Standard Object	
<b>Food Selection</b>	<b>Food_Selection__c</b>	<b>Custom Object</b>	<b>05/06/2023</b>
Image	Image	Standard Object	
Incident	Incident	Standard Object	
Incident Related Item	IncidentRelatedItem	Standard Object	
Individual	Individual	Standard Object	
Invoice	Invoice	Standard Object	
Invoice Line	InvoiceLine	Standard Object	
Lead	Lead	Standard Object	

3.

a. Now click on "Fields & Relationships" > New

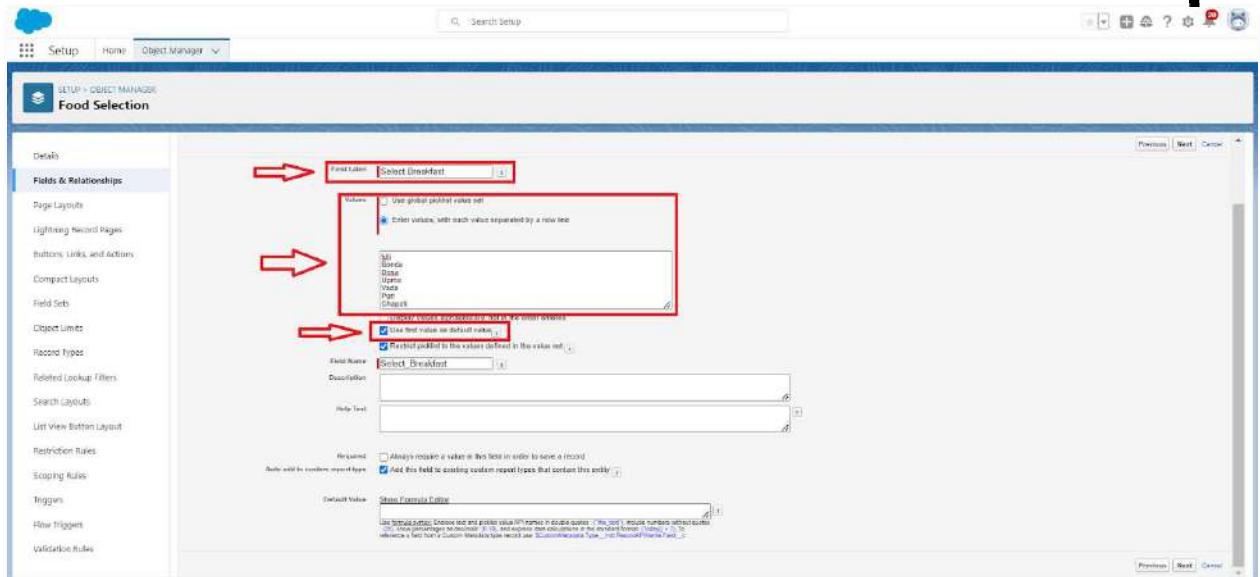
The screenshot shows the 'Fields & Relationships' page for the 'Food Selection' object. A red box highlights the 'Food Selection' button in the top left, and a red arrow points to it from the left. Another red box highlights the 'Fields & Relationships' tab in the left sidebar, and a red arrow points to it from the left. A third red box highlights the 'New' button in the top right, and a red arrow points to it from the right.

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	

4.

5.

a. Select Data Type as a "Picklist"



6.

- Fill the Above as following:
  - Field Label: Select Breakfast
  - Under Value - Enter values, with each value separated by a new line
    - a. Idli
    - b. Bonda
    - c. Dosa
    - d. Upma
    - e. Vada
    - f. Puri
    - g. Chapati
  - Select Checkbox Use First value as default Value
  - Click on Next > Next > Save and new.

7.

### **Field Dependency:**

A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by the value selected in a controlling picklist.

### **Need to use Field Dependency:**

By using the field dependency we can get the different Values by selecting the different Picklist.

### **Create a Field Dependency on Breakfast and Select Breakfast Fields in Food Selection Object.**

- 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 and Click on Field Dependencies

SETUP > OBJECT MANAGER  
Food Selection

Details

Fields & Relationships

10 Items, Sorted by Field Label

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(Customer!)		✓
Select breakfast	Select_Breakfast__c	Picklist	Breakfast	
Select dinner	Select_dinner__c	Picklist	Dinner	

3. Now Click on New Option

SETUP > OBJECT MANAGER  
Food Selection

Details

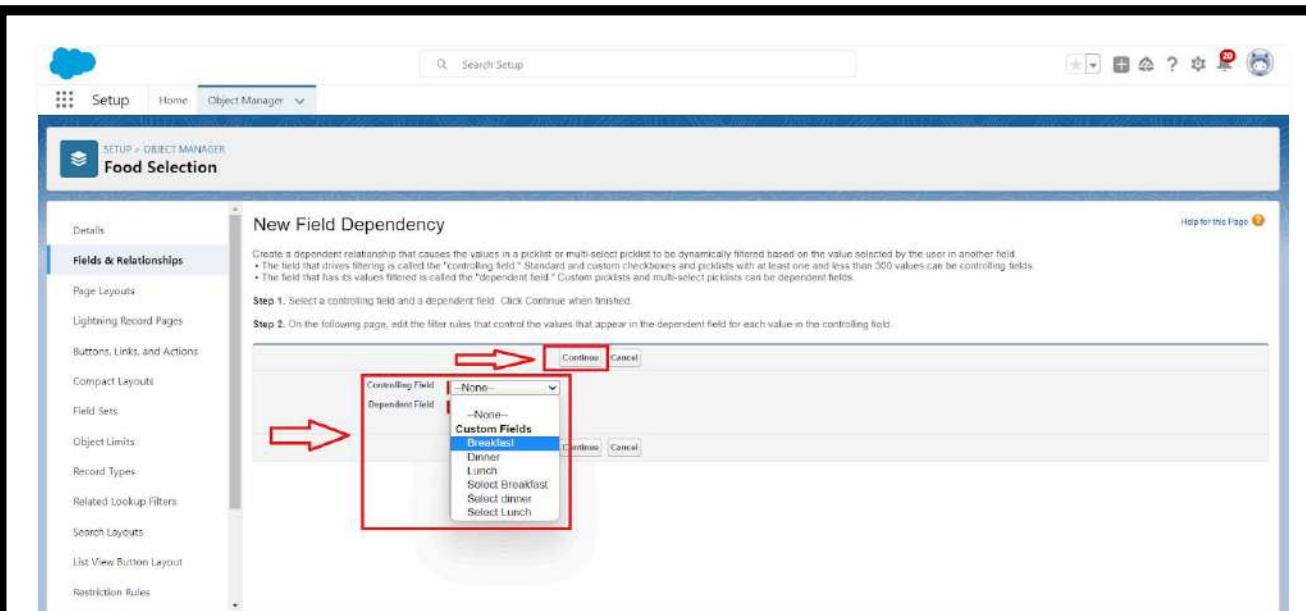
Fields & Relationships

Food Selection Field Dependencies

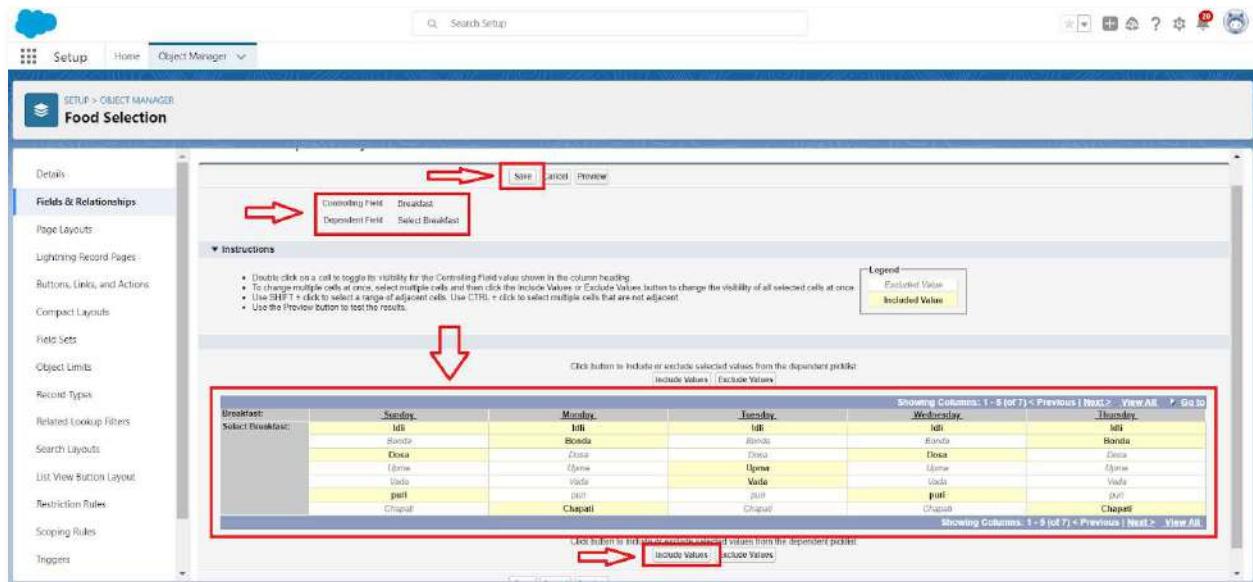
This page allows you to define dependencies between fields (e.g., dependent picklists).

Action	Controlling Field	Dependent Field	Modified By
Edit   Del	Breakfast	Select Breakfast	Vivek Venkata Vangaprasad Androlia, 07/06/2023, 3:45 pm
Edit   Del	Dinner	Select dinner	Vivek Venkata Vangaprasad Androlia, 07/06/2023, 3:55 pm
Edit   Del	Lunch	Select Lunch	Vivek Venkata Vangaprasad Androlia, 07/06/2023, 3:56 pm

4. Under Controlling Field: Breakfast, Dependent Field: Select Breakfast and Click on Continue



5. Under the Sunday Ctrl and select the Picklist values Idli,Dosa,Puri and Click on Include Values in such a way that do for the remaining days and click on save.



#### 4. 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: Lunch
  - Under Value - Select the Use global picklist value set
  - Under the drop down select the Custom Picklist Values

- Select required
- Click on Next > Next > Save and new.

##### **5. 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. Veg biryani
4. Veg fried rice
5. Egg fried rice
6. Chicken fried rice
7. Curd rice
8. Tomato rice
9. Egg noodles
10. Chicken Noodles
11. Bhagara rice
- Select Checkbox Use First value as default Value
- Click on Next > Next > Save and new.

##### **To create a Field dependencies for Lunch and Select Lunch.**

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 and Click on Field Dependencies
3. Now Click on New Option
4. Under Controlling Field:Lunch, Dependent Field: Select Lunch and Click on Continue
5. Under the Sunday Ctrl and select the Picklist values Chicken biryani, Egg fried rice, curd rice and Click on Include Values in such a way that do for the remaining days and click on save.

The screenshot shows the Salesforce Object Manager interface for the 'Food Selection' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Buttons, Links, and Actions, etc. The main area is titled 'Edit Field Dependency' for the 'Lunch' field. It shows a table where rows represent different meal types and columns represent specific dishes. The 'Controlling Field' is set to 'Lunch'. Red arrows point to the 'Save' button at the top right and the 'Include Values' and 'Exclude Values' buttons at the bottom of the table.

## 6. 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: Dinner
  - Under Value - Select the Use global picklist value set
  - Under the drop down select the Custom Picklist Values
  - Select required
  - Click on Next > Next > Save and new.

## 7. 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 Dinner
  - Under Value - Enter values, with each value separated by a new line
    1. Meals
    2. Chicken biryani
    3. Veg biryani

4. Veg fried rice
5. Egg fried rice
6. Chicken fried rice
7. Curd rice
8. Tomato rice
9. Egg noodles
10. Chicken Noodles
11. Bhagara rice
12. Select Checkbox Use First value as default Value
13. Click on Next > Next > Save and new.

### To create a Field dependencies for Dinner and Select Dinner.

14. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
15. Now Click on fields & relationships and Click on Field Dependencies
16. Now Click on New Option
17. Under Controlling Field: Dinner, Dependent Field: Select Dinner and Click on Continue
18. Under the Sunday Ctrl and select the Picklist values Chicken biryani, curd rice, Chicken noodles and Click on Include Values in such a way that do for the remaining days and click on save.

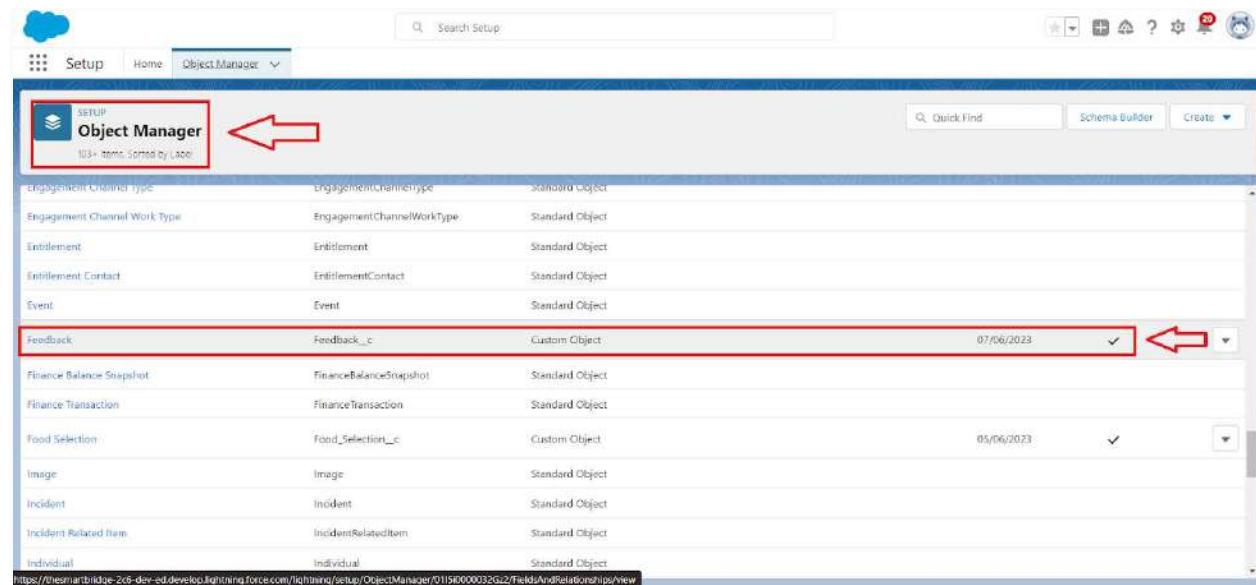
The screenshot shows the 'Edit Field Dependency' page in the Salesforce Setup. The 'Dependent Field' is set to 'Select dinner'. The 'Controlling Field' dropdown shows 'Dinner' with an arrow pointing to it. The 'Sunday' column of the picklist grid is highlighted with a red box, showing values like 'Chicken biryani', 'curd rice', and 'Chicken noodles'. The 'Include Values' checkbox is checked for the Sunday row. A second red arrow points to the 'Include Values' checkbox at the bottom of the grid.

## ACTIVITY5:

# Creation of fields for the Feedback object

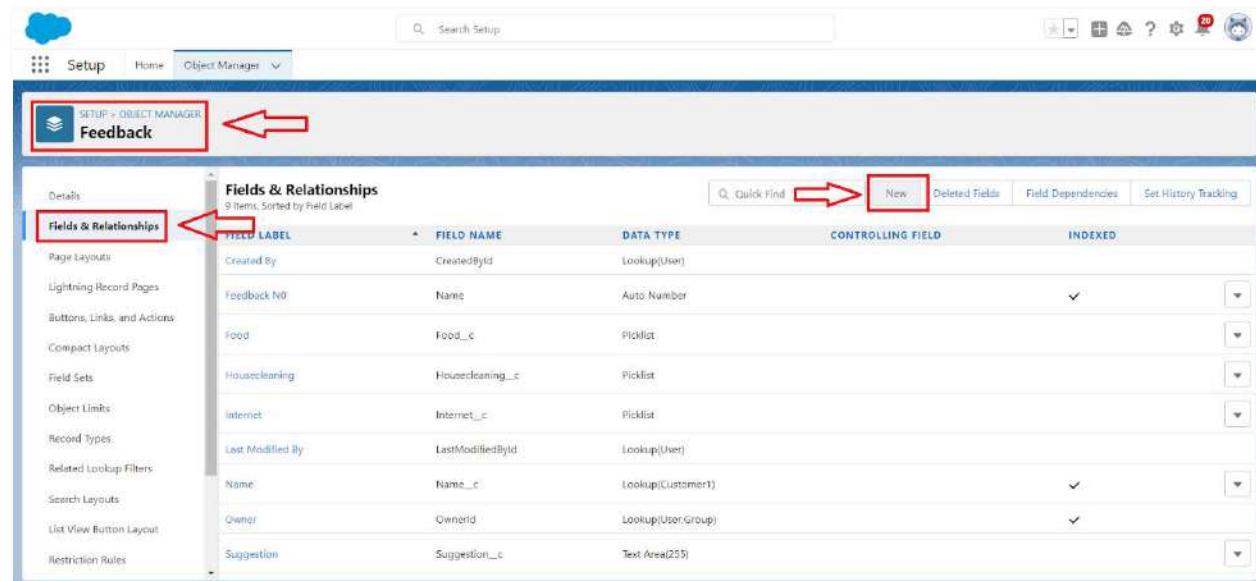
## 1. create fields & relationship to an object:

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



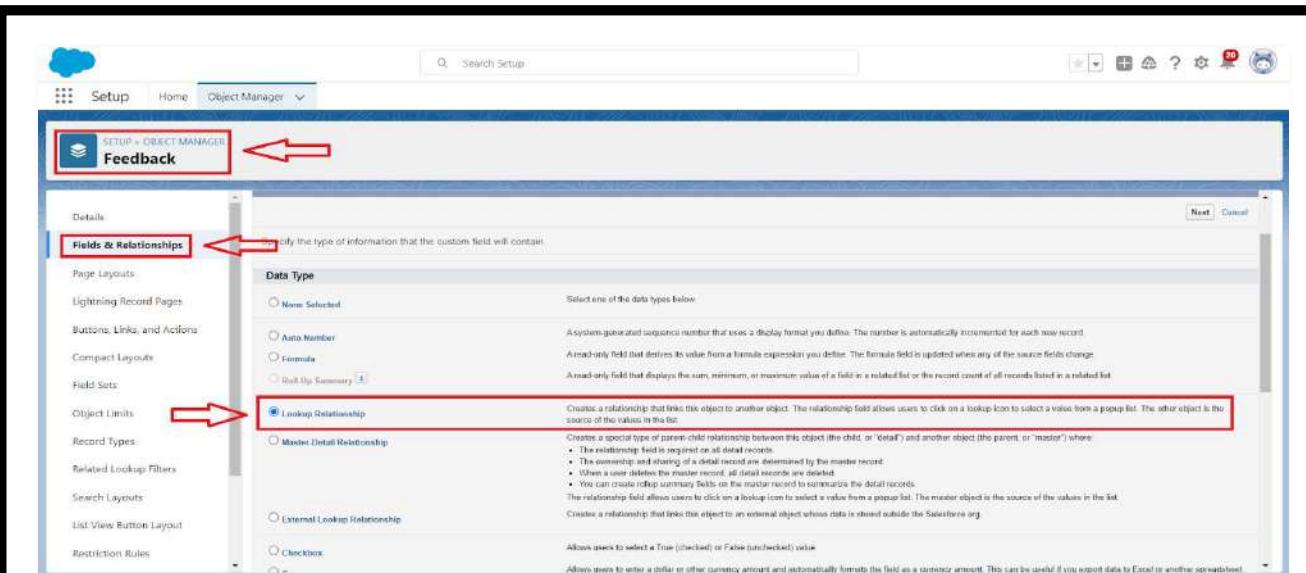
The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A red box highlights the 'Object Manager' button in the top left, and a red arrow points to it. Another red box highlights the 'Feedback' row in the list, and a red arrow points to the 'Feedback' label. The 'Feedback' row shows the field name 'Feedback\_\_c' and data type 'Custom Object'. A date field shows '07/06/2023' with a dropdown arrow.

2. Now click on "Fields & Relationships" > New

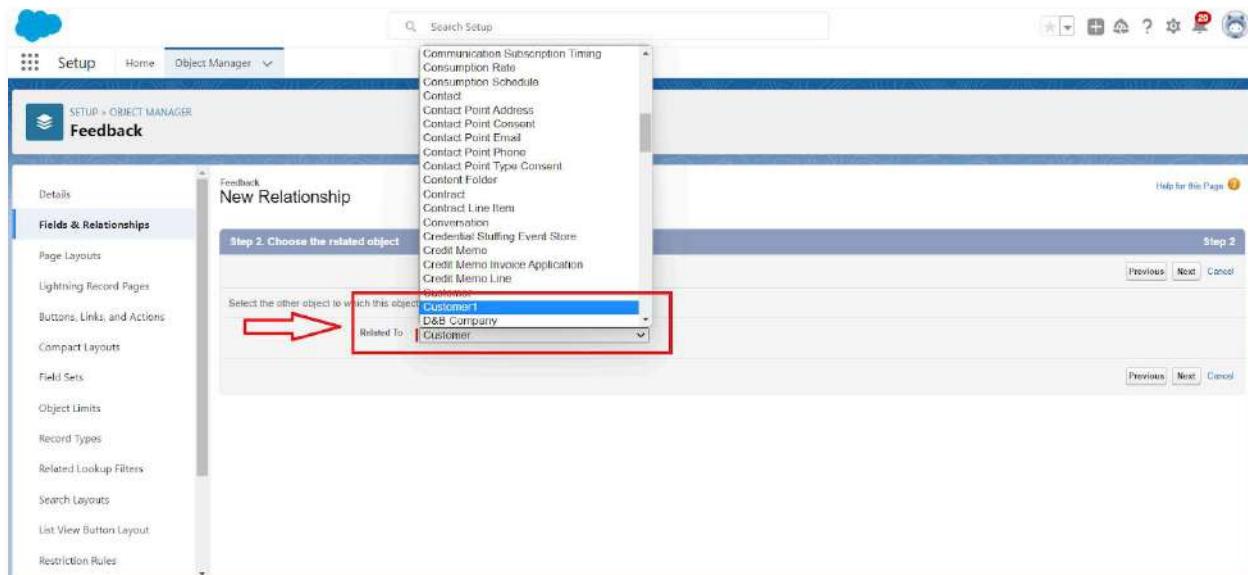


The screenshot shows the 'Fields & Relationships' page for the 'Feedback' object. A red box highlights the 'Feedback' object name in the top left, and a red arrow points to it. Another red box highlights the 'Fields & Relationships' link in the sidebar, and a red arrow points to it. The main table lists various fields with their labels, names, data types, and controlling fields. A red box highlights the 'New' button at the top right, and a red arrow points to it.

3. Select Data Type as a "Lookup Relationship"
4. Click on Next



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 Another fields in an Same object:

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

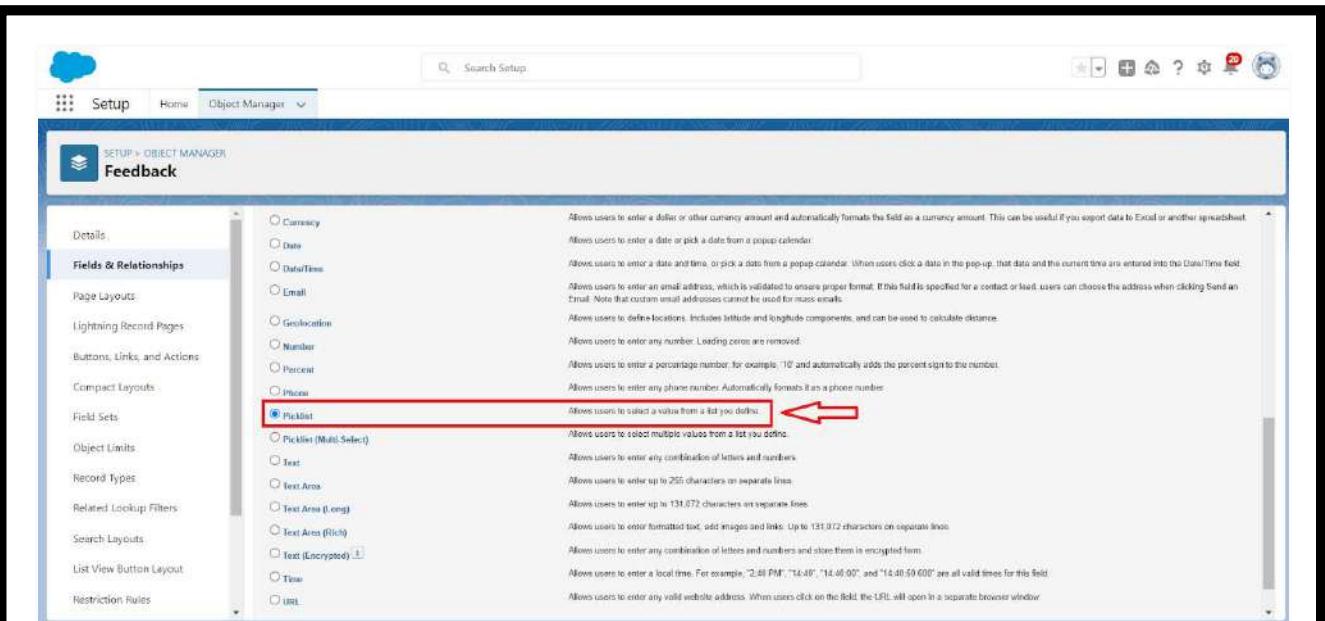
The screenshot shows the Salesforce Object Manager. A red arrow points to the 'Object Manager' tab in the top navigation bar. Another red arrow points to the 'Feedback' row in the list, which is highlighted with a red border. The 'Feedback' object is identified as a 'Custom Object'. The URL in the browser address bar is <https://thesmarthubze-205-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01s|0000032G2/FieldsAndRelationships/view>.

2. Now click on "Fields & Relationships" > New

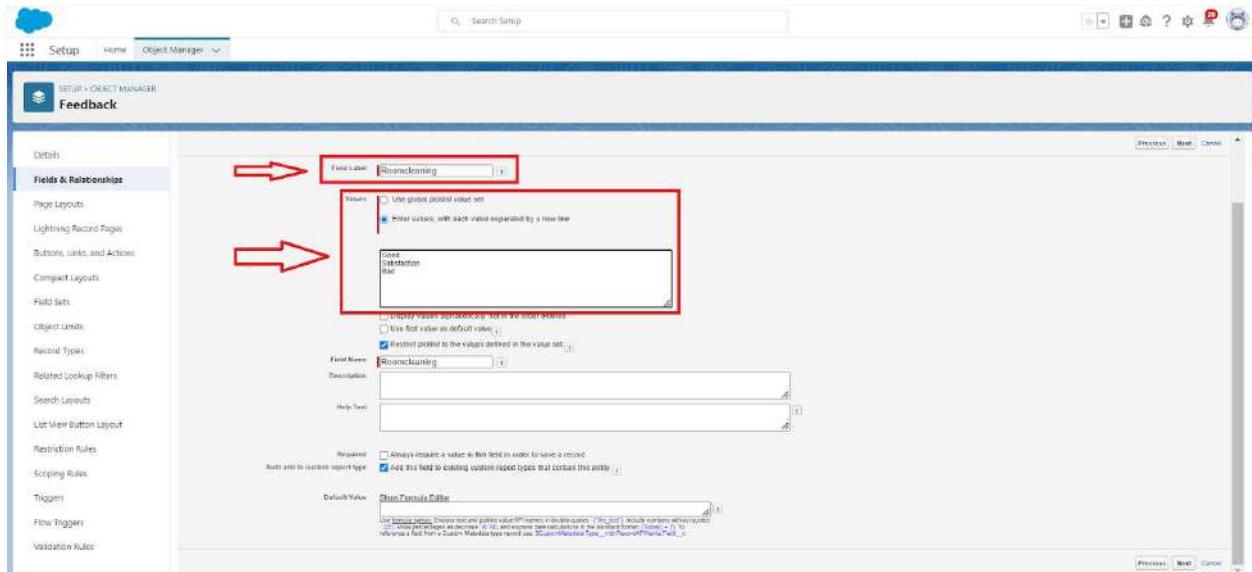
The screenshot shows the 'Fields & Relationships' page for the 'Feedback' object. A red arrow points to the 'Feedback' object name in the top navigation bar. Another red arrow points to the 'Fields & Relationships' link in the left sidebar. A third red arrow points to the 'New' button at the top right of the main table area. The table lists various fields with their labels, names, data types, controlling fields, and indexing status. The 'Food' field is highlighted with a red border.

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(Customer)		
Owner	OwnerId	Lookup(User Group)		
Suggestion	Suggestion_c	Text Area(255)		

3. Select Data Type as a "Picklist"



#### 4. Click on Next



#### 5. Fill the Above as following:

- Field Label: Roomcleaning
  - Field Name :It's gets auto generated
  - Under Values select Enter values, with each value separated by a new line
1. Good
  2. Satisfaction
  3. Bad
- Click on Next > Next > Save and new.

### 3. To create a Another Fields 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
  3. Select Data Type as a “Picklist”
  4. Click on Next
  5. Fill the Above as following:
    - Field Label: Internet
    - Field Name :It's gets auto generated
    - Under Values select Enter values, with each value separated by a new line
  1. Good
  2. Satisfaction
  3. Bad
  - Click on Next > Next > Save and new.

#### **4. To create a Another Fields 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
3. Select Data Type as a “Picklist”
4. Click on Next
5. Fill the Above as following:
  - Field Label: Food
  - Field Name :It's gets auto generated
  - Under Values select Enter values, with each value separated by a new line
1. Good
2. Satisfaction
3. Bad
- Click on Next > Next > Save and new.

#### **5. To create a Another Fields 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
3. Select Data Type as a “Text area”
4. Click on Next
5. Fill the Above as following:
  - Field Label: Suggestion
  - Field Name :It's gets auto generated
  - Click on Next > Next > Save and new.

# ACTIVITY6

## Creation of fields for the Total Rooms object

### 1. To create fields in an object:

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

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' button in the top left. A red arrow points from the text 'click on Object Manager' to this button. Another red box highlights the 'Total Room' row in the list, and a red arrow points from the text 'click on the object' to the dropdown menu next to the object name.

2. Now click on "Fields & Relationships" > New

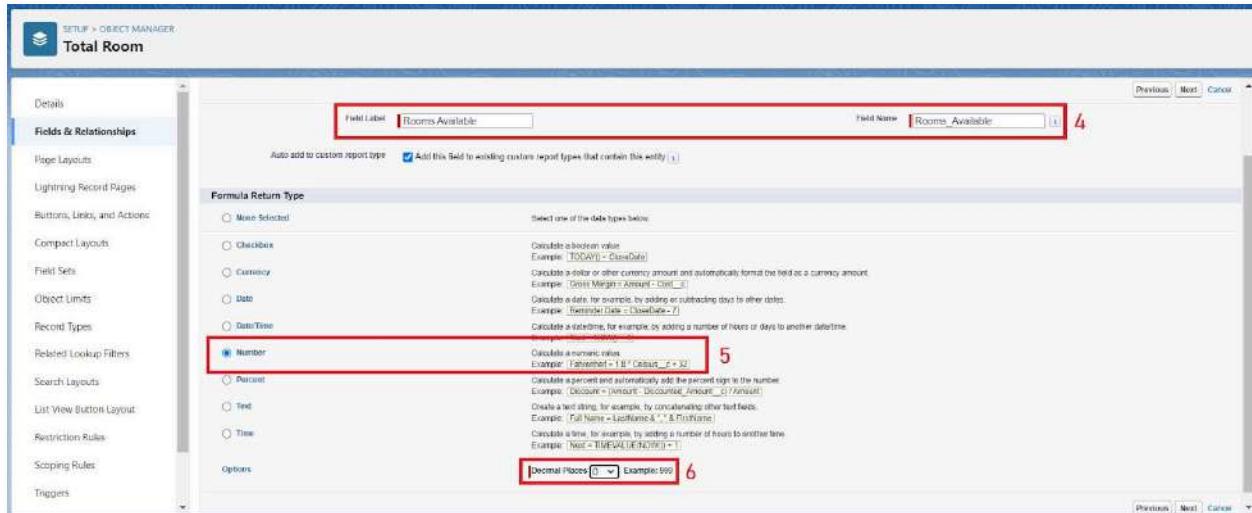
The screenshot shows the 'Fields & Relationships' page for the 'Total Room' object. A red box highlights the 'Total Room' object name at the top. A red arrow points from the text 'click on the object' to the object name. A red box highlights the 'Fields & Relationships' tab in the sidebar, and a red arrow points from the text 'click on "Fields & Relationships"' to this tab. A red box highlights the 'New' button in the top right, and a red arrow points from the text 'click on Next' to this button.

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

The screenshot shows the 'Step 1. Choose the Field type' page. A red box highlights the 'Fields & Relationships' tab in the sidebar, and a red arrow points from the text 'click on "Fields & Relationships"' to this tab. A red box highlights the 'New' button in the top right, and a red arrow points from the text 'click on Next' to this button. A red box highlights the 'Formula' option under 'Data Type', and a red arrow points from the text 'Select Data type as a "Formula"' to this option. A red number '3' is located in the bottom right corner of the page.

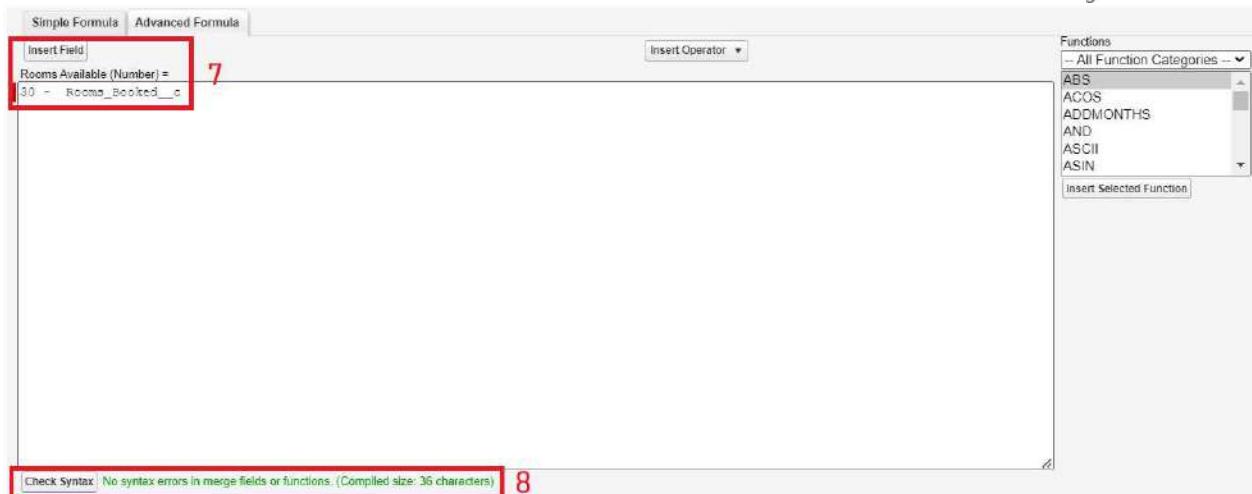
4. Fill the Above as following:
5. Field Label: Rooms Available

6. Field Name : It's gets auto generated
7. Select the Formula Return Type 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 Advanced Formula “30 - Rooms\_Booked\_c” and Check Syntax



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

## TASK6:

### 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.

## ACTIVITY1:

### create a validation rule to an Room Booking Object

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

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Room Booking' row in the list, which is also selected. A red arrow points to the 'Room Booking' row. A date field at the bottom right of the list has a red arrow pointing to it.

2. Now click on "Validation rule" at top > New.

The screenshot shows the 'Validation Rules' page for the 'Room Booking' object. A red box highlights the 'Room Booking' object name in the top navigation bar. Another red box highlights the 'Validation Rules' section in the left sidebar. A red arrow points to the 'Validation Rules' section. A red box highlights the 'New' button in the top right corner, and a red arrow points to it.

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)

Validation Rule Edit

Rule Name: checkbox\_rule

Active:

Description: checkbox field is less than zero the record should be save.

Error Condition Formula

Example: Discount\_Percent <= 30 More Examples...  
Display an error if Discount is more than 30%  
If this formula expression is true, display the text defined in the Error Message area

Insert Field:  Insert Operator:   
checkbox\_field < 0

Functions: All Function Categories

CONTAINS  
COS  
CURRENCYRATE  
DATE  
DATETIMEVALUE  
DATEVALUE  
ABS(number)  
Returns the absolute value of a number, a number without its sign

Check Syntax: No errors found.

Error Message

Example: Discount percent cannot exceed 30%  
This message will appear when Error Condition formula is true

Error Message: Check box should be checked

This error message can either appear at the top of the page or below a specific field on the page

Error Location:  Top of Page  Field: checkbox\_field

7. Click on save.

## ACTIVITY2:

### create a Another validation rule to an Room Booking Object

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Validation rule” at top > New.
3. Enter Rule name “check in rule” and make the validation should be Active.
4. Enter the formula in the formula Box “ Check\_in\_c = False ” and check for syntax error.
5. Enter the error message “Check box should be checked”
6. Select error location as field(Check in)

Rule Name: check\_in\_rule

Active:  1

Description:

Error Condition Formula

Example: Discount\_Percent <= 30 More Examples...  
Display an error if Discount is more than 30%  
If this formula expression is true, display the text defined in the Error Message area

Insert Field:  Insert Operator:  2  
Check\_in\_c = False

Functions: All Function Categories

CONTAINS  
COS  
CURRENCYRATE  
DATE  
DATETIMEVALUE  
DATEVALUE  
ABS(number)  
Returns the absolute value of a number, a number without its sign

Check Syntax: No errors found.

Error Message

Example: Discount percent cannot exceed 30%  
This message will appear when Error Condition formula is true

Error Message: Check box should be checked 3

This error message can either appear at the top of the page or below a specific field on the page

Error Location:  Top of Page  Field: Check\_in 4

## **TASK7**

### **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 profiles in salesforce**

##### **1. Standard profiles:**

By default salesforce provides below standard profiles.

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

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects... available on the platform.

##### **2. Custom Profiles:**

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

## **ACTIVITY1**

### **Custom user Profile**

#### **To create a new profile:**

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired

profile (Standard User)

2. Enter profile name (Custom User) > Save.

The screenshot shows the 'Clone Profile' page in the Salesforce Setup. At the top, there's a 'SETUP' icon and a 'Profiles' tab. Below the tabs, it says 'Clone Profile' and asks 'Enter the name of the new profile.' A note says 'You must select an existing profile to clone from.' An 'Existing Profile' section shows 'User license: Standard User' and 'Profile Name: Custom user'. A red arrow points to the 'Profile Name' input field. At the bottom right are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give All access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

The screenshot shows the 'Edit Profile' page in the Salesforce Setup. It features two large tables for object permissions. The first table covers 'Customers', 'Feedbacks', and 'Food Selections'. The second table covers 'Payments', 'Room Bookings', and 'Total Rooms'. Each table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). Every checkbox in these tables is checked. Red arrows point to the first and second tables respectively.

5. Scroll down and Click on Save.

## ACTIVITY2

### Custom platform user1

To create a new profile:

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired

- profile (Standard platform User)
2. Enter profile name (Custom platform User1) > Save.
  3. While still on the profile page, then click Edit.
  4. Scroll down to Custom Object Permissions and Give only Read access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

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

	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Room Bookings	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Total Rooms	<input checked="" 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
- Obfuscate secret answers for password resets:
- Require a minimum 1 day password lifetime:

5. Scroll down and Click on Save.

## ACTIVITY3

### Custom platform user2

**To create a new profile:**

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard platform User)
2. Enter profile name (Custom platform User2) > Save.
3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give Create, Read, Edit and Delete access permissions for Customers, Feedbacks, Food selections, Payments and Room Bookings. And Read Access permission for 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"/>

	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 type="checkbox"/>	<input type="checkbox"/>
Room Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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
- Obfuscate secret answer for password resets:
- Require a minimum 1 day password lifetime:

5. Scroll down and Click on Save.

## TASK8

### 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.

### ACTIVITY1

#### Marketing Role

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

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with 'Users' expanded, showing 'Roles' highlighted with a red arrow. The main content area displays a 'Sample Role Hierarchy' diagram. At the top level is 'Executive Staff' with three roles: 'CEO', 'President', 'CFO', and 'VP, Sales'. Arrows point down to 'Western Sales Director' (under CEO), 'Eastern Sales Director' (under President), and 'International Director' (under CFO). These three directors each have a corresponding 'Sales Rep' role below them: 'Western Sales Rep' (under Western Sales Director), 'Eastern Sales Rep' (under Eastern Sales Director), and 'International Sales Rep' (under International Director). A legend on the right explains the icons: a blue square for 'View & edit data, roll up forecasts, & generate reports for all users below', a grey square for 'Can access data of other Executive Staff', and a green square for 'View & edit data, roll up forecasts, & generate reports for all users directly beneath this user'. At the bottom right of the main area is a 'Set Up Roles' button with a red arrow pointing to it.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there's a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted with a red arrow. Below it is a tree view of roles for 'Nick Enterprises': 'CEO' (with 'Edit | Del | Assign' buttons), 'HR' (with 'Edit | Del | Assign' buttons), 'Manager' (with 'Edit | Del | Assign' buttons), 'On Site Emp' (with 'Edit | Del | Assign' buttons), and 'Remote Emp' (with 'Edit | Del | Assign' buttons). Under each of these main roles is an 'Add Role' button, also highlighted with a red arrow.

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

The screenshot shows the 'Role Edit' page for a 'New Role'. The 'Label' field contains 'Marketing' and the 'Role Name' field also contains 'Marketing', both highlighted with a red arrow. Below these fields are 'This role reports to' and 'Role Name as displayed on reports' fields, both of which are empty. At the bottom of the page are 'Save', 'Save & New', and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

4. Then click on Save.

## ACTIVITY2

### 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. Give Label as "Receptionist" and Role name gets auto populated.

The screenshot shows the 'Role Edit' page in Salesforce. At the top, there's a 'SETUP' button and a 'Roles' icon. Below that, it says 'Role Edit New Role'. On the right, there's a 'Help for this Page' link. The main form has a 'Role Edit' section. It contains fields for 'Label' (set to 'Receptionist') and 'Role Name' (also set to 'Receptionist'). An arrow points to the 'Label' field. Below that is a 'This role reports to' field set to 'CEO', with another arrow pointing to it. There's also a 'Role Name as displayed on reports' field which is empty. At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'. An arrow points to the 'Save' button.

4. Then click on Save.

## TASK9

### 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.

## ACTIVITY1

### Create User

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

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. On the left, there's a sidebar with various setup categories like 'Permission Set Groups', 'Profiles', and 'User Management Settings'. Under 'Users', there's a sub-menu with 'Users' highlighted. A red arrow points to the 'Users' link in this sub-menu. The main area is titled 'All Users' and contains a table of users with columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. At the top of the user list, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A red arrow points to the 'New User' button.

## 2. Fill in the fields

- First Name : sandeep
- Last Name : gujja
- Alias : Give a Alias Name
- Email id : Give your Personal Email id
- Username : Username should be in this form: text@text.com
- Nick Name : Give a Nickname
- Role : CEO
- User licence : Salesforce
- Profiles : Custom user

The screenshot shows the 'New User' edit screen. It has two tabs: 'General Information' and 'Advanced'. The 'General Information' tab is active, showing fields for First Name, Last Name, Alias, Email, Username, and Nickname, all of which are highlighted with a red box. The 'Advanced' tab is also shown, with its own set of fields. A red arrow points to the 'Role' dropdown in the 'Advanced' tab, which is set to 'CEO'. Another red arrow points to the 'General Information' section.

## 3. save.

# ACTIVITY2

## Create Another User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
  - First Name : Abhilash
  - Last Name : garapati
  - Alias ..... : Give a Alias Name
  - Email id : Give your Personal Email id
  - Username : Username should be in this form: text@text.com
  - Nick Name : Give a Nickname
  - Role : Marketing
  - User licence: Salesforce platform
  - Profiles : Custom Platform User1

The screenshot shows the Salesforce 'User Edit' page for a user named 'abhilash garapati'. The page is divided into two main sections: 'General Information' on the left and a sidebar on the right.

**General Information:** This section contains input fields for personal details like First Name, Last Name, Alias, Email, Username, and Nickname. The 'First Name' field is populated with 'abhilash', and the 'Last Name' field is populated with 'garapati'. A red box highlights this entire section, and a red arrow points to the 'Save' button at the top of the page.

**Right Sidebar:** This sidebar displays user configuration options. It includes a 'Role' dropdown set to 'Marketing', a 'User License' dropdown set to 'Salesforce Platform', a 'Profile' dropdown set to 'Customer Platform user1', and an 'Active' checkbox which is checked. A red box highlights this section, and a red arrow points to it from the 'General Information' section.

3. save

## ACTIVITY3

### Create Another User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
  - First Name : Ganesh
  - Last Name : gelli
  - Alias : Give a Alias Name

- Email id : Give your Personal Email id
- Username : Username should be in this form: text@text.com
- Nick Name: Give a Nickname
- Role : Receptionist
- User licence: Salesforce Platform
- Profiles : Custom Platform user2

The screenshot shows the Salesforce Setup interface under the 'Users' section. A new user is being created with the following details:

- General Information:**
  - First Name: Ganesh
  - Last Name: gelli
  - Alias: ggell
  - Email: ganesh@gmail.com
  - Username: gganesh@tech.com
  - Nickname: ganit
- Role:** Receptionist
- User License:** Salesforce Platform
- Profiles:** Custom Platform user2
- Active:** Checked

3. Save

## TASK10

### User Adoption

User Adoption

#### ACTIVITY1

#### Create a Record (Customers)

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

2

3

3. Click on the Customers Tab.

New Customer1

\* = Required Information

Information

*Customer Name Text	Owner Veera Venkata Varaprasad Androthu
*Phone no 9702874232	*Permanent Address Hyderabad
Email id tech@gmail.com	*current Status Employee

Cancel Save & New Save

4. Click new and fill details & Save

## ACTIVITY2

### View a Record (Customers)

- Click on App Launcher on the left side of the screen.
- Search Home Feels & click on it.
- Click on Customer Tab.
- 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'. The 'Details' tab is active. The data is organized into two columns:

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

## ACTIVITY3

### 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 titled 'Recently Viewed' with 5 items updated 2 minutes ago. The list includes:

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

Numbered callouts indicate the steps for deletion:

1. The first item in the list, 'sandeep', is highlighted with a red box.
2. An arrow points from the 'sandeep' entry to the delete icon in the bottom right corner of the list.
3. The delete icon is highlighted with a red box.
4. A larger red box highlights the 'Delete' option in the context menu that appears when the delete icon is clicked.

## TASK11

### 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

## ACTIVITY1

### 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 currently selected), and Dashboards. Below the navigation bar, there's a sidebar on the left with categories: Reports, Recent (3 items), Created by Me, Private Reports, Public Reports, and All Reports. The main area displays a table titled 'RECENT' with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. There are three rows in the table:

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	

At the top right of the main area, there's a search bar labeled 'Search recent reports...' and a red box highlighting the 'New Report' button. A red number '3' is also visible above the search bar.

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
6. Save or run it.

## ACTIVITY2

### Create another 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  
Select customer with Room booking with Payments ? click on start report.
4. Customize your report
5. Add fields from left pane as shown Above
6. Save or run it.

## TASK12

### 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.

# ACTIVITY1

## Create Dashboard

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

The screenshot shows the application's main menu bar with various tabs like Co-Living, Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Dashboards' tab is highlighted with a red box and has a red number '1' next to it. Below the menu is a search bar and a toolbar with icons. A sub-menu for 'Dashboards' is open, showing a list of recent dashboards with a red box around the 'New Dashboard' button.

2. Give a Name and click on Create.

A modal dialog box titled 'New Dashboard' is displayed. It contains fields for 'Name' (with 'custom Dashboard' typed in) and 'Description'. Below these is a 'Folder' section with a dropdown set to 'Custom Dashboard' and a 'Select Folder' button. At the bottom right of the dialog is a blue 'Create' button, which is also highlighted with a red box and has a red arrow pointing to it.

3. Select add component.

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

A modal dialog box titled 'Select Report' is shown. On the left is a sidebar with sections for 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'Folders' (Created by Me, Shared with Me, All Folders), and a search bar. The main area displays a list of reports. One report, 'Room booking report' by 'Veeva Venkata Varaprasad Androthu' dated '14-Jun-2023, 2:58 pm - custom report', is highlighted with a red box and has a red arrow pointing to it. At the bottom right of the list is a 'Select' button, which is also highlighted with a red box and has a red arrow pointing to it.

Edit Component

Room booking report

Subtitle

Amount

Footer

Legend Position

Right

Component Theme

Light (Dashboard default)

Dark

Preview

Room booking report

Amount

Sum of Amount: ₹156k

Customer Name	Amount
Abhilash	₹28k
Ganesh	₹20k
Prasad	₹34k
sandeep	₹44k
suman	₹30k

View Report (Room booking report)

Cancel Update

The screenshot shows the 'Edit Component' interface. On the left, there are several input fields: 'Room booking report' (text), 'Subtitle' (text), 'Amount' (text), 'Footer' (text), 'Legend Position' (dropdown with 'Right' selected), and 'Component Theme' (radio buttons for 'Light' and 'Dark', with 'Dark' selected). In the center, a preview window displays a funnel chart titled 'Room booking report' with the subtitle 'Amount'. The chart shows the sum of amount as ₹156k and lists five customers with their respective amounts: Abhilash (₹28k), Ganesh (₹20k), Prasad (₹34k), sandeep (₹44k), and suman (₹30k). To the right of the chart is a legend titled 'Customer Name' with color-coded squares corresponding to each name. At the bottom right of the preview window, there are 'Cancel' and 'Update' buttons, with a red arrow pointing to the 'Update' button.

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

## ACTIVITY2

### Create Another Dashboard

1. Go to the app > click on the Dashboard tabs and click on new Dashboard.
2. Give a Name and click on Create.
3. Select add component.
4. Select a Report Customer with Room Booking with Payments and click on select.
5. Click Add then click on Save and then click on Done.

## TASK13

## ACTIVITY1

### Flows

In Salesforce, a flow is a powerful tool that allows you to automate business

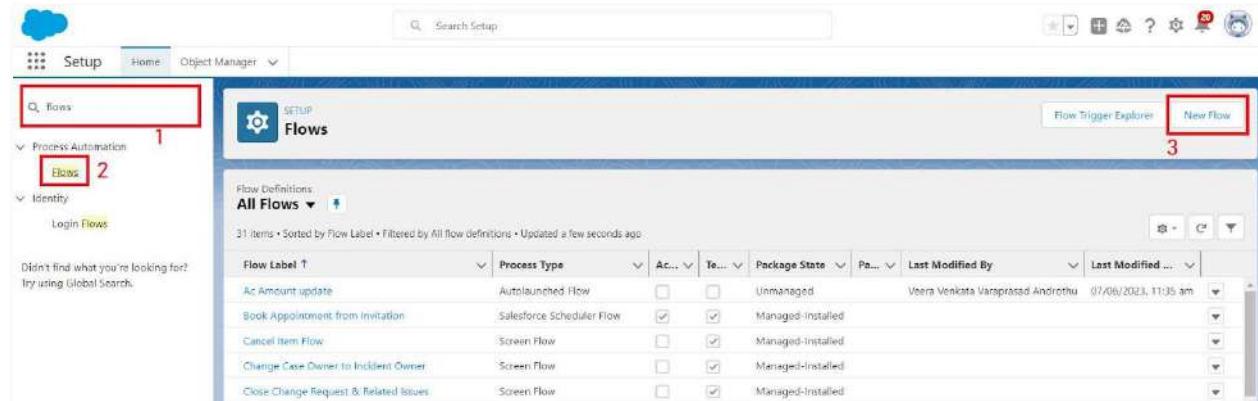
processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

### 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.

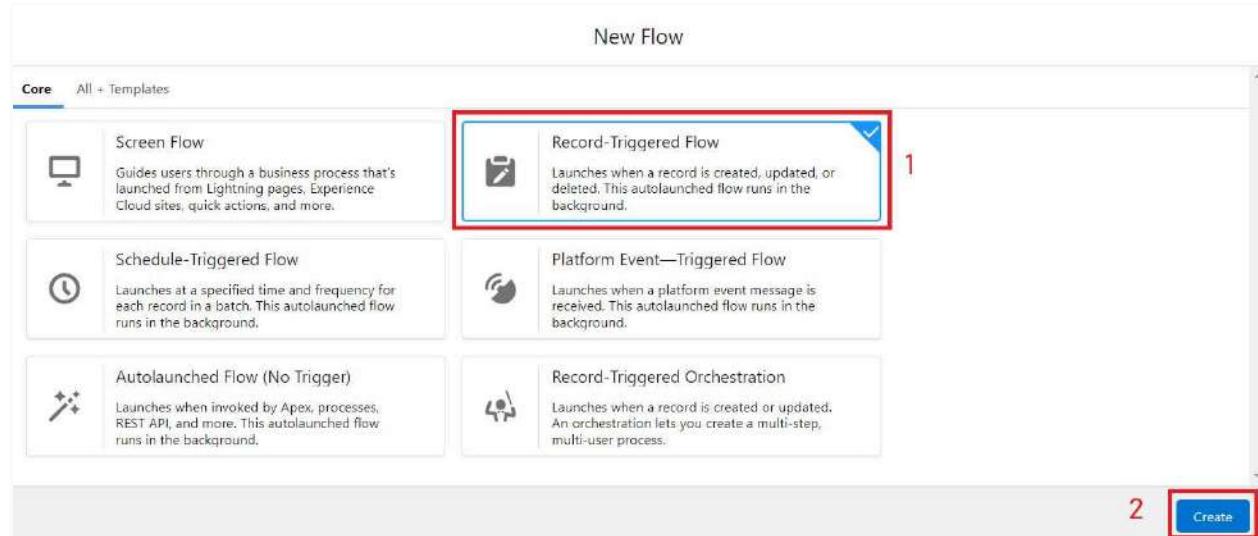
## Create a Flow

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



The screenshot shows the Salesforce Setup interface. In the left sidebar, 'Flows' is selected under 'Process Automation'. The main area displays a list of 'Flow Definitions' with a 'New Flow' button at the top right. Red numbers 1, 2, and 3 are overlaid on the screen to indicate specific points of interest: 1 is on the 'Flows' search result, 2 is on the 'Flows' link in the sidebar, and 3 is on the 'New Flow' button.

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



The screenshot shows the 'New Flow' creation page. Under the 'Core' tab, there are several flow types: Screen Flow, Record-Triggered Flow, Schedule-Triggered Flow, Platform Event—Triggered Flow, Autolaunched Flow (No Trigger), and Record-Triggered Orchestration. The 'Record-Triggered Flow' option is highlighted with a red box and a number 1. At the bottom right, there is a large blue 'Create' button with a red number 2.

3. Select the Object as a Room Booking in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".

5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object: Room Booking 1

Configure Trigger

\* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated 2
- A record is deleted

- 6.Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select



the "Decision Element".

7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.
  - Resource: Select Record.Room sharing.
  - Operator: Select Equals.
  - Value: Select Single sharing.
  - Click on "Add Condition"
  - Resource: Select Record.AC-3000.
  - Operator: Select Equals.
  - Value: Select False.
  - Click on "+" Symbol In the Outcome Order.

New Decision

* Label Field Should be Update	* API Name Field_Should_be_Update
Description 1	
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.	
OUTCOME ORDER 2	OUTCOME DETAILS 3
+ 4	* Label Single Sharing * Outcome API Name Single_Sharing Condition Requirements to Execute Outcome All Conditions Are Met (AND) Resource: \$Record > Room sharing Operator: Equals Value: single sharing AND Resource: \$Record > AC - 3000 Operator: Equals Value: False
+ Add Condition      Cancel      Done	

9. Enter the Outcome Details Label: Double sharing, Outcome API name: Gets Automatically Generated.

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

10. Enter the Outcome Details Label: Triple sharing, Outcome API name: Gets Automatically Generated.

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

OUTCOME ORDER 1 + 3

OUTCOME DETAILS 1

\* Label: Triple Sharing \* Outcome API Name: Triple\_Sharing

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: \$Record > Room sharing Operator: Equals Value: Triple sharing

Resource: AND \$Record > AC - 3000 Operator: Equals Value: False

Delete Outcome

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

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

OUTCOME ORDER 1 + 3

OUTCOME DETAILS 1

\* Label: Single Ac \* Outcome API Name: Single\_Ac

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: \$Record > Room sharing Operator: Equals Value: single sharing

Resource: AND \$Record > AC - 3000 Operator: Equals Value: {ISGlobalConstant.True}

Delete Outcome

12. Enter the Outcome Details Label: Double Ac, Outcome API name: Gets Automatically Generated.

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

The screenshot shows the 'OUTCOME DETAILS' section for an outcome labeled 'Double Ac'. The 'Label' field contains 'Double Ac' and the 'Outcome API Name' field contains 'Double\_Ac'. A dropdown menu under 'Condition Requirements to Execute Outcome' is set to 'All Conditions Are Met (AND)'. Below this, two conditions are defined using the '\$Record' resource:

- Condition 1: Resource '\$Record > Room sharing' with Operator 'Equals' and Value 'Double sharing'.
- Condition 2: Condition 1 AND Condition 2: Resource '\$Record > AC - 3000' with Operator 'Equals' and Value '{!\$GlobalConstant.True}'.

Red boxes highlight the 'Label' field (1), the condition requirements dropdown (2), and the 'Add Condition' button (3).

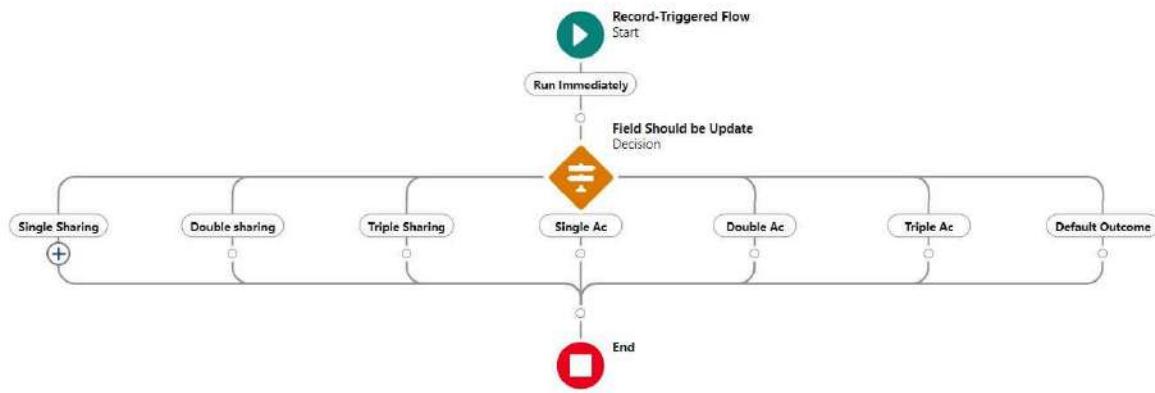
13. Enter the Outcome Details Label: Triple Ac, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Triple sharing.
- Click on "Add Condition"
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select True.
- Click on Done

The screenshot shows the 'New Decision' configuration screen for an outcome labeled 'Triple Ac'. The 'Label' field contains 'Triple Ac' and the 'Outcome API Name' field contains 'Triple\_Ac'. A dropdown menu under 'Condition Requirements to Execute Outcome' is set to 'All Conditions Are Met (AND)'. Below this, two conditions are defined using the '\$Record' resource:

- Condition 1: Resource '\$Record > Room sharing' with Operator 'Equals' and Value 'Triple sharing'.
- Condition 2: Condition 1 AND Condition 2: Resource '\$Record > AC - 3000' with Operator 'Equals' and Value 'True'.

Red boxes highlight the 'Label' field (1), the condition requirements dropdown (2), and the 'Done' button (3).



14. Click on "+" Symbol under the single sharing and Select the "update Records" in the drop down list.

15. Enter the update records details

- Label: Single.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 28000.
- Click on Done. Enter the update records details
- Label: Double.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 24000.
- Click on Done.

## Edit Update Records

Update Salesforce records using values from the flow.

\*Label

Double

\*API Name

Double

Description

### \* How to Find Records to Update and Set Their Values

- Use the room booking record that triggered the flow
- Update records related to the room booking record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

 Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

## Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

## Set Field Values for the Room Booking Record

Field

Amount\_\_c

Value

24000



+ Add Field

Cancel

Done

### 17. Enter the update records details

- Label: Triple.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 20000.
- Click on Done.

## Edit Update Records

Update Salesforce records using values from the flow.

* Label	* API Name
Triple	Triple
Description	
<div style="height: 40px; border: 1px solid #ccc;"></div>	

### \* How to Find Records to Update and Set Their Values

- Use the room booking record that triggered the flow
- Update records related to the room booking record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

**i** Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

### Set Field Values for the Room Booking Record

Field	Value
Amount_c	20000

**+ Add Field**

**Cancel** **Done**

### 18. Enter the update records details

- Label: Single ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 34000.
- Click on Done.

## Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
single ac1	single_ac1
Description	
<p> </p>	

### \* How to Find Records to Update and Set Their Values

- Use the room booking record that triggered the flow
- Update records related to the room booking record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

**Info** Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

## Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

## Set Field Values for the Room Booking Record

Field	Value
Amount_c	34000

**Add Field**

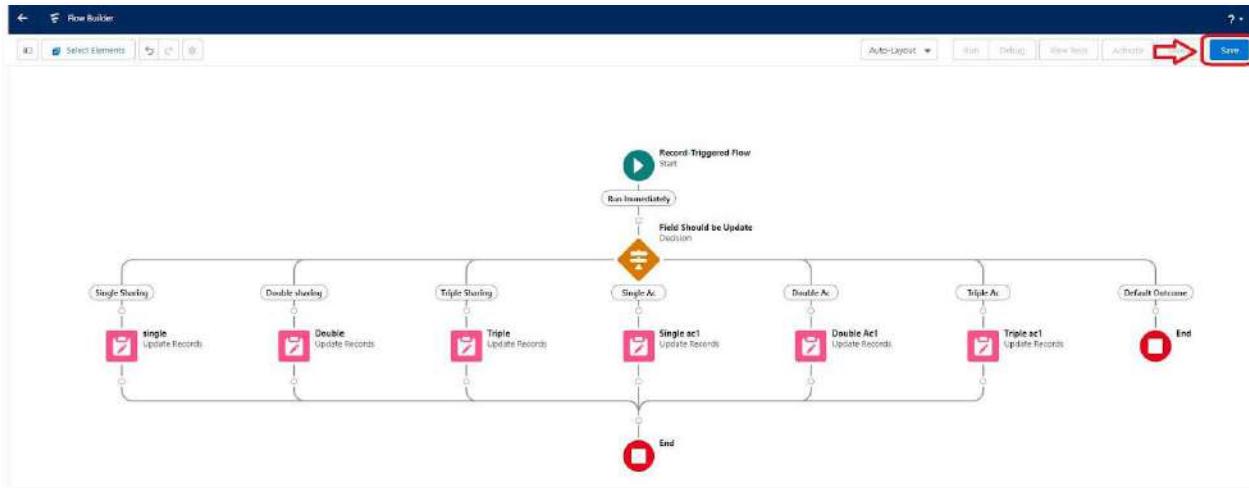
**Cancel** **Done**

### 19. Enter the update records details

- Label: Double ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 30000.
- Click Enter the update records detailsLabel: Triple ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.

- Value: 26000.
- Click on Done.

The Flow will Form like This and Click on save.



22. Enter the Flow Label: Update Amount Field, Flow API Name: Gets Automatically Generated and Click on Save.

1

Save the flow

* Flow Label Update Amount Field	* Flow API Name Update_Amount_Field
Description   	
Show Advanced	
Cancel <span style="border: 2px solid red; padding: 2px 10px;">Save</span>	

2

## ACTIVITY2

### Test the Flow

1. Go to App Launcher and search for Co-living and select the app
2. In the Co-living app click on the Room sharing tab and click on new.
3. Enter the details like Name, Room sharing, Ac-3000, Advance payment for 1 Month. And the Amount field is empty before saving the record.
4. After saving the record the amount gets reflected in the Amount field by using the given flows.

