

A CRM Application to Manage the Booking of Co-Living

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

Features and Functionality:

1. Customer Management

- I. **Customer Registration:** Users can register themselves by providing personal details such as name, email, phone number, and address.
- II. **Customer Profile:** A user profile will be created to store customer information, booking history, and payment details.

2. Room Booking

- I. **Room Selection:** Users can browse and select from different AC rooms with multiple sharing options (e.g., single, double, triple sharing).
- II. **Room Availability:** The application will display the availability of each room type in real-time.
- III. **Booking:** Users can book a room by selecting the desired room type, check-in and check-out dates, and number of occupants.

3. Food Services

- I. **Food Menu:** A menu of special food items will be available for users to select from.
- II. **Daily Food Selection:** Users can select food items for each day of their stay.

- III. Food Preferences:** Users can specify dietary restrictions or preferences (e.g., vegetarian, gluten-free).

4. Payment Management

- I. Payment Options:** Users can make payments using various modes such as credit/debit cards, net banking, or wallets.
- II. Payment History:** A record of all payments made by a user will be stored in their profile.

5. Feedback and Review

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

6. Reporting and Analytics

- I. Booking Reports:** The application will generate reports on room bookings, occupancy rates, and revenue.
- II. Customer Insights:** The application will provide insights on customer behavior, preferences, and feedback.

7. Security and Access Control

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

8. Functionality

- I. **Search and Filter:** Users can search for available rooms by date, room type, and sharing options.
- II. **Booking Confirmation:** Once a booking is made, the user will receive a confirmation email with details of their booking.
- III. **Payment Reminders:** The application will send reminders to users for pending payments.
- IV. **Feedback Notifications:** The application will send notifications to administrators when a user provides feedback.
- V. **Reporting and Analytics:** The application will generate reports and provide insights on customer behavior and preferences.

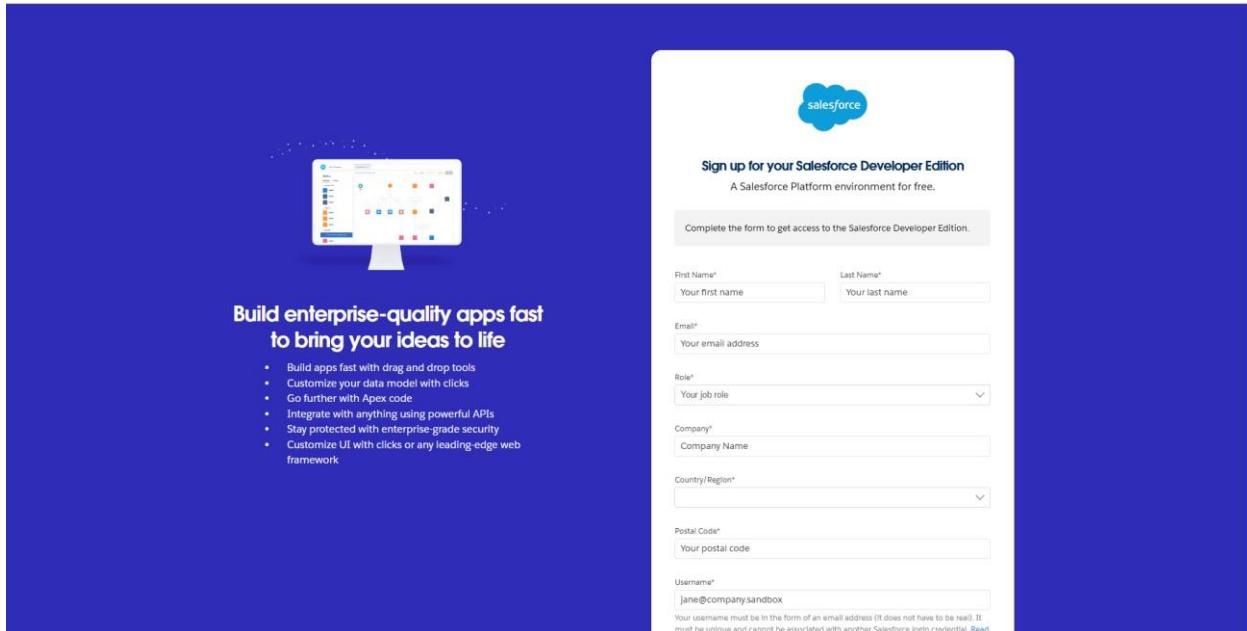
Milestone 1 - Introduction to Salesforce:

What is Salesforce?

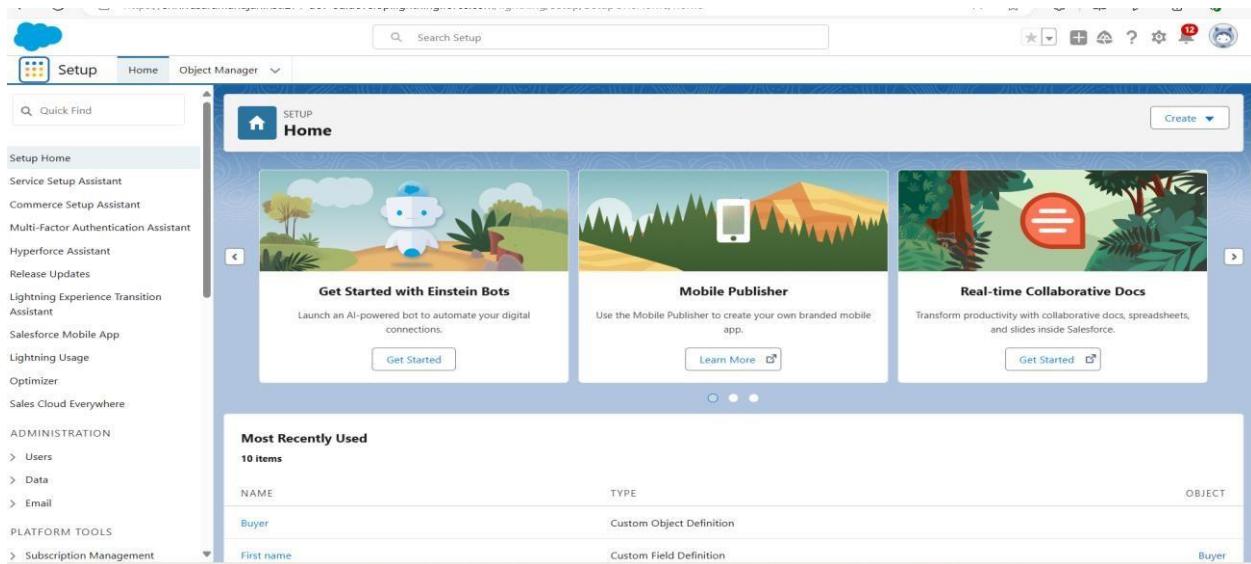
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate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

Activity 1: Creating Developer Account:

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



Activity 2: Account Activation:



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

Milestone 2 – Object

What Is an Object?

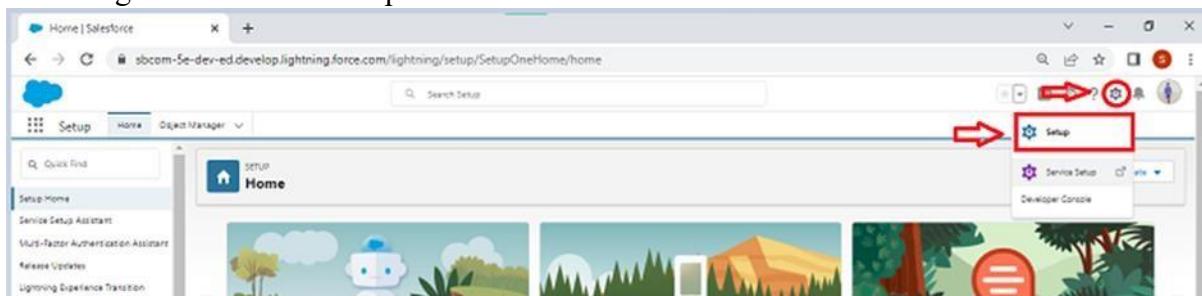
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

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

To Navigate to Setup page:

Click on gear icon ? click setup.



To create an object:

- From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.

The screenshot shows the Salesforce Setup interface. At the top, there's a blue cloud icon, a search bar labeled "Search Setup", and various navigation icons. Below the header, the "Object Manager" tab is selected, indicated by a black arrow pointing to it. To the right of the tabs, there's a "Create" button with a dropdown arrow. A large red oval highlights the "Custom Object" link under the "Create" button. The main content area shows a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. A row for "Custom Object" is visible, with a "Custom Object from Spreadsheet" link next to it.

- On the Custom object defining page:
- Enter the label name, and plural label name, click on Allow reports, and Allow search.

This screenshot shows the "New Custom Object" setup page. The "Label" field contains "Example: Account" and the "Plural Label" field contains "Example: Accounts". Both fields have red arrows pointing to them. The "Object Name" field contains "Account" and has a red arrow pointing to it. In the "Optional Features" section, the "Allow Reports" checkbox is checked, and the "Allow Search" checkbox is also checked. Red arrows point to both of these checked boxes. At the bottom right, there are "Save" and "Save & New" buttons, with a red arrow pointing to the "Save" button.

This screenshot continues the "New Custom Object" setup page. It shows the "Optional Features" section again, with the "Allow Reports" checkbox checked and a red arrow pointing to it. Below that is the "Object Classification" section, which includes checkboxes for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access", all of which are checked. The "Deployment Status" section shows "Deployed" is selected. The "Search Status" section has the "Allow Search" checkbox checked and a red arrow pointing to it. At the very bottom, there are "Save", "Save & New", and "Cancel" buttons, with a red arrow pointing to the "Save" button.

- Click on Save.

Activity 1: Create a custom object for Total Rooms

To create an object:

1. From the setup page Click on Object Manager Click on Create Click on Custom Object.
- 1.Enter the label name Supplier
- 2.Plural label name? Suppliers
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' page in Salesforce. The 'Custom Object Definition Edit' screen has several sections:

- Custom Object Information:** Fields for 'Label' (Total Room) and 'Plural Label' (Total Rooms). The 'Label' field is highlighted with a red box and labeled '1'.
- Object Name:** Fields for 'Object Name' (Total_Rooms) and 'Example: Account'. The 'Object Name' field is highlighted with a red box and labeled '2'.
- Record Name Label and Format:** Fields for 'Record Name' (Total No Of Rooms) and 'Data Type' (Text). The 'Record Name' field is highlighted with a red box and labeled '3'.
- Optional Features:** A section with checkboxes for 'Allow Reports' (checked), 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Allow Reports' checkbox is highlighted with a red circle and has a red arrow pointing to it.
- Deployment Status:** A section with radio buttons for 'In Development' and 'Deployed'. The 'Deployed' radio button is checked.
- Search Status:** A section with a checkbox for 'Allow Search'. This checkbox is highlighted with a red circle and has a red arrow pointing to it.
- Object Creation Options:** A section with checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. The 'Save' button is highlighted with a red box and has a red arrow pointing to it.

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

The screenshot shows the 'Optional Features' and 'Object Creation Options' sections of the setup page:

- Optional Features:** Shows checkboxes for 'Allow Reports' (checked), 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. A red circle highlights the 'Allow Reports' checkbox, and a red arrow points to it.
- Object Creation Options:** Shows checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. A red arrow points to the 'Save' button at the bottom of this section.

Create a custom object for Customer

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A sidebar on the left lists various configuration options like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main 'Details' section shows the following configuration for the 'Customer1' object:

- Description: (empty)
- API Name: Customer1_c
- Custom: ✓
- Singular Label: Customer1
- Plural Label: Customers
- Enable Reports: ✓
- Track Activities: (empty)
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Buttons at the top right include 'Edit' and 'Delete'.

Create a custom object for Room Booking

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A sidebar on the left lists various configuration options like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main 'Details' section shows the following configuration for the 'Room Booking' object:

- Description: (empty)
- API Name: Room_Booking_c
- Custom: ✓
- Singular Label: Room Booking
- Plural Label: Room Bookings
- Enable Reports: ✓
- Track Activities: (empty)
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Buttons at the top right include 'Edit' and 'Delete'.

Create a custom object for Payment

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various setup categories like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main area displays the details for a custom object named 'Payment1'. The API Name is set to 'Payment1_c'. The singular label is 'Payment1' and the plural label is 'Payments'. Under the 'Details' tab, there are sections for Description, Enable Reports (unchecked), Track Activities, Track Field History (unchecked), Deployment Status (set to 'Deployed'), Help Settings, and Standard salesforce.com Help Window.

Create a custom object for Food Selection

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various setup categories. The main area displays the details for a custom object named 'Food Selection'. The API Name is set to 'Food_Selection__c'. The singular label is 'Food Selection' and the plural label is 'Food Selections'. Under the 'Details' tab, there are sections for Description, Enable Reports (unchecked), Track Activities, Track Field History (unchecked), Deployment Status (set to 'Deployed'), Help Settings, and Standard salesforce.com Help Window.

Create a custom object for Feedback

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "SETUP > OBJECT MANAGER".
- Section:** "Feedback".
- Left Sidebar (Details):** A list of tabs including Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. "Search Layouts" is also present at the bottom.
- Right Main Area (Details):**
 - Description:** A text input field.
 - API Name:** "Feedback__c".
 - Custom:** A dropdown menu showing "Custom" selected.
 - Singular Label:** "Feedback".
 - Plural Label:** "Feedbacks".
 - Buttons:** "Edit" and "Delete" at the top right.
 - Advanced Settings:** Includes "Enable Reports" (checked), "Track Activities", "Track Field History" (checked), "Deployment Status" (set to "Deployed"), "Help Settings", and "Standard salesforce.com Help Window".

Milestone 3 - Tabs

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

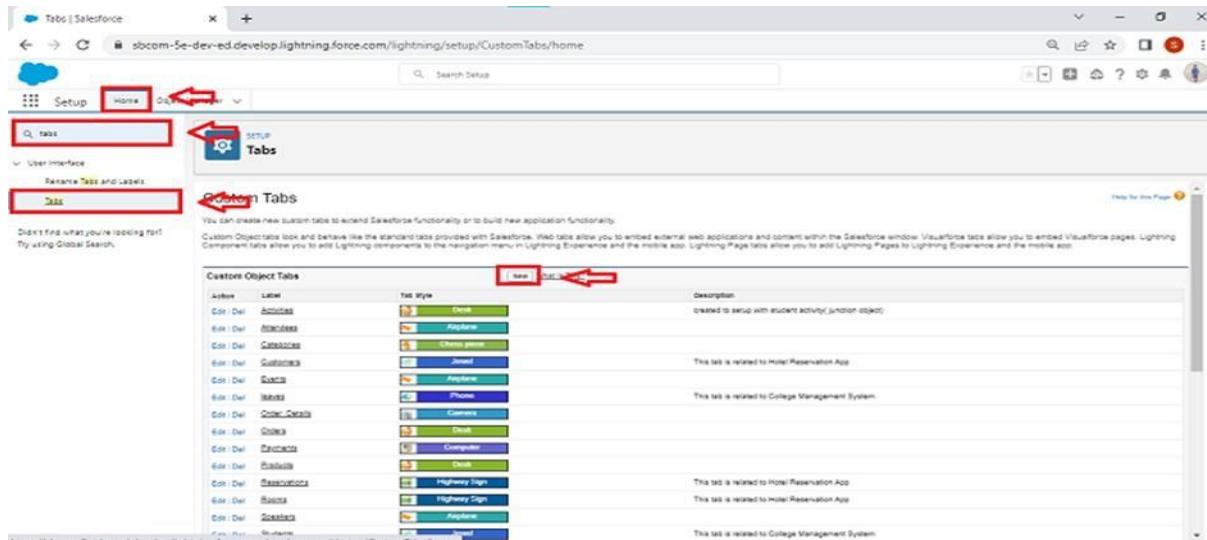
Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

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.

Activity 1: Creating a Tab for Total Rooms

To create a Tab:(Total Rooms)

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



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

3. Next (Add to profiles page) keep it as default

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

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.

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.

Milestone 4 - 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.

Activity 1: 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'. A red box highlights the 'App Manager' tab. Below it, there's a search bar with 'Search Setup' and a 'New Lightning App' button, which is also highlighted with a red box. A red arrow points from the 'New Lightning App' button towards the main content area. The main area displays a table of existing apps, with a red arrow pointing to the 'Clone Apps(Beta)' link below the table header.

App Name	Developer Name	Description	Last Modified	App Type
All Tab	AI-tabedit	Build AI-powered dashboards and apps	04/12/2022, 10:13 am	Classic
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic
Boat Solutions	LightningBoat	Discover and manage business solutions designed for your industry	04/12/2022, 10:18 am	Lightning
Charter Desktop	Charter/Desktop	Charter Desktop is an Adobe AIR-based desktop application that lets Charter users stay connected...	29/12/2022, 4:04 pm	Connected (Managed)
Charter Mobile for BlackBerry	CharterForBlackBerry	The Salesforce.com Charter Mobile app lets you access Charter data on the go. Use it to view fee...	29/12/2022, 4:05 pm	Connected (Managed)
College Management System	Naresh	demo app	08/12/2022, 4:18 pm	Lightning
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic
Data Manager	DataManager	Use Data Manager to view, limits, monitor usage, and manage recipes	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 first section is 'App Details & Branding'. It includes fields for 'App Name' (with a placeholder 'Name your app...'), 'Developer Name' (with a placeholder 'Enter a developer name...'), and 'Description' (with a placeholder 'Enter a description...'). To the right, there's an 'App Branding' section with 'Image' (a placeholder image), 'Primary Color Hex Value' (#0070D2), and a color picker. Below these are 'Org Theme Options' (unchecked) and an 'App Launcher Preview' section. A red arrow points to the 'App Name' field, and another red arrow points to the 'Next' button at the bottom right.

3. To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers1, Room Booking, Payments1, Food selection, Feedbacks, Reports and Dashboards) from the search bar and move it using the arrow button > Next.

4. To Add User Profiles:

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

Milestone 5 – Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records 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 nonrequired standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- ? Created By
- ? Owner
- ? Last Modified
- ? Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each 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.

Activity 1: 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.

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

The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon followed by 'Setup', 'Home', and 'Object Manager'. Below this, the title 'SETUP > OBJECT MANAGER' and the object name 'Customer1' are displayed. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' with a sub-header '8 items, Sorted by Field Label'. It contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists standard fields such as Created By, current Status, Customer Name, Email Id, Last Modified By, Owner, Permanent Address, and Phone no. At the bottom right of the table, there's a 'New' button. Red arrows highlight the 'Customer1' object name, the 'Fields & Relationships' tab, and the 'New' button.

3. Select Data Type as a “Phone”

The screenshot shows the 'Fields & Relationships' section of the Salesforce Setup for the 'Customer1' object. The left sidebar shows 'Fields & Relationships' is selected. The main area displays a list of data types: Currency, Date, Date/Time, Email, Geolocation, Number, Percent, and Phone. The 'Phone' option is highlighted with a red box and a red arrow pointing to its description. The description states: 'Allows users to enter any phone number. Automatically formats it as a phone number.' Below this, a long list of other data types is shown with their descriptions, such as Picklist, Text, and URL.

4. Click on next

The screenshot shows the 'Custom Field Definition Edit' page for 'Customer1'. The 'Field Information' section contains fields for 'Field Label' (set to 'Phone no') and 'Field Name' (auto-generated as 'Phone_no'). The 'General Options' section includes a checked checkbox for 'Always require a value in this field in order to save a record' and a 'Save' button.

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

- Student
- Employee
- Others

- Select required
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

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

The screenshot shows the Salesforce Setup interface. In the top left, there is a breadcrumb trail: 'SETUP > OBJECT MANAGER'. Below it, the object name 'Room Booking' is selected. On the left sidebar, under 'Fields & Relationships', the 'New' button is highlighted with a red arrow. The main area displays a table titled 'Fields & Relationships' with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains several rows of existing fields, such as 'AC - 3000' (FIELD NAME: AC__c, DATA TYPE: Checkbox), 'Advance payment for 1month' (FIELD NAME: Advance_payment_for_1month_c, DATA TYPE: Checkbox), 'Amount' (FIELD NAME: Amount_c, DATA TYPE: Currency(18, 0)), 'Created By' (FIELD NAME: CreatedById, DATA TYPE: Lookup(User)), 'Last Modified By' (FIELD NAME: LastModifiedById, DATA TYPE: Lookup(User)), 'Name' (FIELD NAME: Name_c, DATA TYPE: Master-Detail(Customer)), and 'Room No' (FIELD NAME: Name, DATA TYPE: Auto Number). The 'New' button at the top right of the table is also highlighted with a red arrow.

3. Select Data Type as a “Picklist”

4. Click on Next

SETUP > OBJECT MANAGER
Room Booking

Step 2. Enter the details

Field Label: Room Sharing 1

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line 2

Single sharing
Double sharing
Triple sharing

Field Name: Room_Sharing
Description: Room_Sharing
Help Text: 3

Default Value: Show Formula Editor

Required Always require a value in this field in order to save a record

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

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.

SETUP
Object Manager 1

153+ items. Sorted by Label

Object Name	API Name	Type	Last Modified Date
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 2	07/06/2023 3
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

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

Fields & Relationships

8 Items, Sorted by Field Label

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(Customer1)		
Room No	Name	Auto Number		

Quick Find Deleted Fields Field Dependencies Set History Tracking

3. Select Data Type as a “Master-detail Relationship”

4. Click on Next

Setup > Object Manager
Room Booking

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Fields & Relationships

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

Data Type

None Selected

Select one of the data types below.

Auto Number

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

Formula

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

Roll Up Summary

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

Lookup Relationship

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

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.
- The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

Master-Detail Relationship

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox

Allows users to select a True (checked) or False (unchecked) value.

Currency

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

Date

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

Date/Time

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.

Email

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.

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

Room Booking
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

- None-
- Conversation**
- Credential Stuffing Event Store
- Credit Memo
- Credit Memo Invoice Application
- Credit Memo Line
- Custom Object
- Data Use Legal Basis
- Data Use Purpose
- Engagement Channel Type
- Engagement Channel Work Type
- Entitlement
- Feedback
- Food Selection
- Incident
- Incident Related Item
- Individual
- Legal Entity
- Location
- Location Group

Help for this Page

Step 2 of 6

Previous Next Cancel

6. Fill the Above as following:
- Change the Field Label: Name
- Field Name : It's gets auto generated

Room Booking
New Relationship

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

Field Label [i]

Field Name [i]

Description

Help Text

Child Relationship Name [i]

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

Allow reparenting Child records can be reparented to other parent records after they are created

Auto add to custom report type Add this field to existing custom report types that contain this entity [i]

Help for this Page

Step 3 of 6

Previous Next Cancel

- 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

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

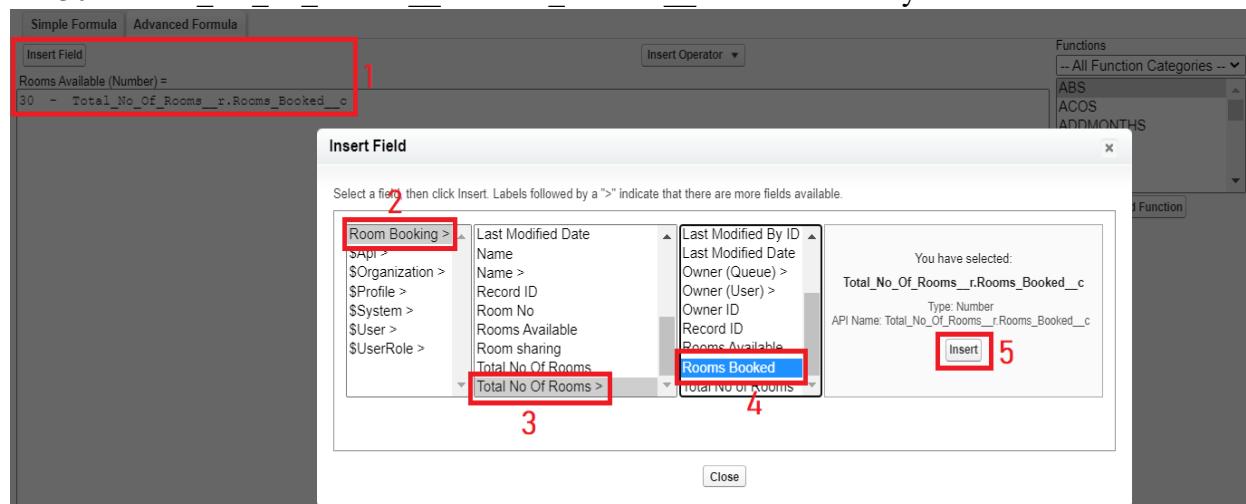
All records should be included in the calculation

Help for this Page

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

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. A red box highlights the 'Payment1' object in the top navigation bar. Another red box highlights the 'Fields & Relationships' tab in the left sidebar. A third red box highlights the 'New' button in the top right corner of the main content area. The main content area displays a table of existing fields for the Payment1 object, with columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table includes fields like Amount, Created By, Last Modified By, Name, Payment ID, Payment Mode, Payment no, and Room Booking.

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 “Master-detail Relationship”

SETUP > OBJECT MANAGER

Payment1

Details

Fields & Relationships

Data Type

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

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

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

4. Click on Next

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

SETUP > OBJECT MANAGER

Payment1

Details

Fields & Relationships

Step 2. Choose the related object

Select the other object to which this object is related

Related To

- None
- Credit Memo Line
- Customer
- D&B Company
- Data Use Legal Basis
- Data Use Purposes
- Engagement Channel Type
- Engagement Channel Work Type
- Entitlement
- Feedback
- Food Selection
- Incident
- Incident Related Item

SETUP > OBJECT MANAGER

Payment1

Details

Fields & Relationships

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

Field Label: Name

Field Name: Name

Child Relationship Name: Payments1

Sharing Setting: Read Only

Allow reparenting: Child records can be reparented to other parent records after they are created

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

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

Object Manager

Payment1

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Master-Detail(Customer1)		✓
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

Setup > Object Manager

Payment1

Fields & Relationships

Data Type

Lookup Relationship

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

None Selected

Auto Number

Formula

Roll Up Summary

Master Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

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

The image consists of two vertically stacked screenshots from the Salesforce Setup > Object Manager interface.

Screenshot 1: Step 2. Choose the related object

- The title bar shows "SETUP > OBJECT MANAGER" and the object name "Payment1".
- The left sidebar lists various setup options under "Fields & Relationships".
- The main area is titled "Payment1 New Relationship".
- Step 2: Choose the related object. A dropdown menu labeled "Related To" is open, showing "Room Booking" at the top, which is highlighted with a red box and has a red arrow pointing to it.
- Buttons at the bottom right include "Previous", "Next", and "Cancel".

Screenshot 2: Step 3. Enter the label and name for the lookup field

- The title bar shows "SETUP > OBJECT MANAGER" and the object name "Payment1".
- The left sidebar lists various setup options under "Fields & Relationships".
- The main area is titled "Step 3. Enter the label and name for the lookup field".
- Field Label: "Room Booking" (highlighted with a red box and a red arrow).
- Field Name: "Room_Booking" (highlighted with a red box and a red arrow).
- Child Relationship Name: "Payments1" (highlighted with a red box and a red arrow).
- Buttons at the bottom right include "Previous", "Next", and "Cancel".

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

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

Details

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)		
Payment 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”

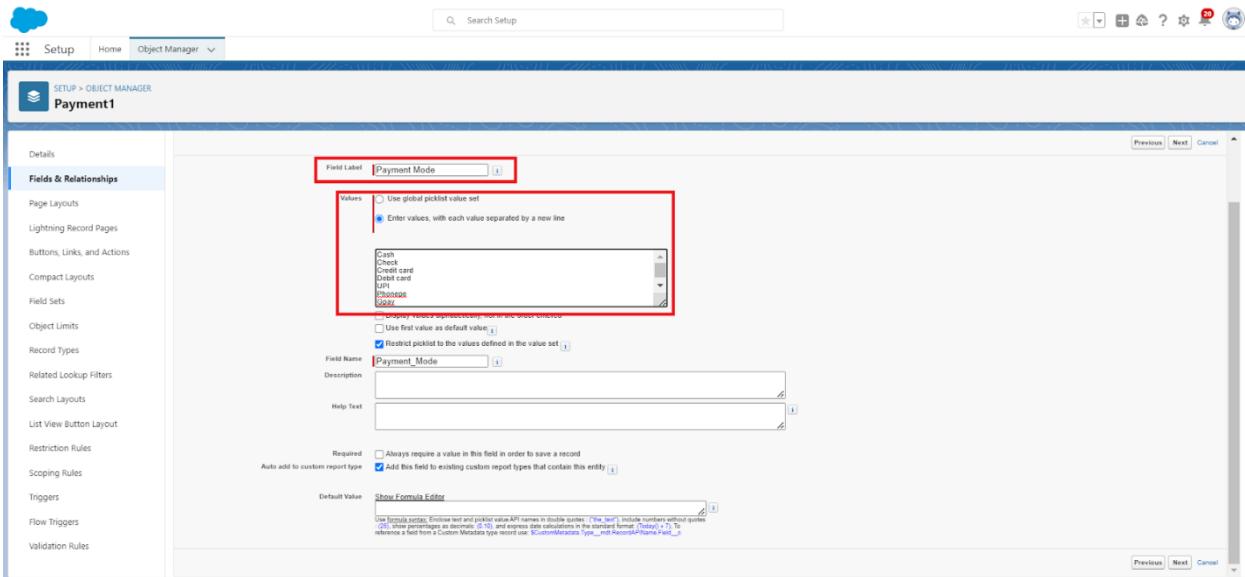
SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

Details

Field Types

- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) (1)
- Time



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 > Save and new.

Cross Object Formula Field:

In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

Why do we need to create the Cross Object Formula Field:

If we want to get the Particular field from another object in that case we will use the Cross object Formula field. For that First we need to create the relationship b/w two objects and relate the field with formula data type.

4. Create a Cross object formula Field in Payment1 Object

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

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)		
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 “Formula”

4. Click on Next

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

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

Data Type

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

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

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

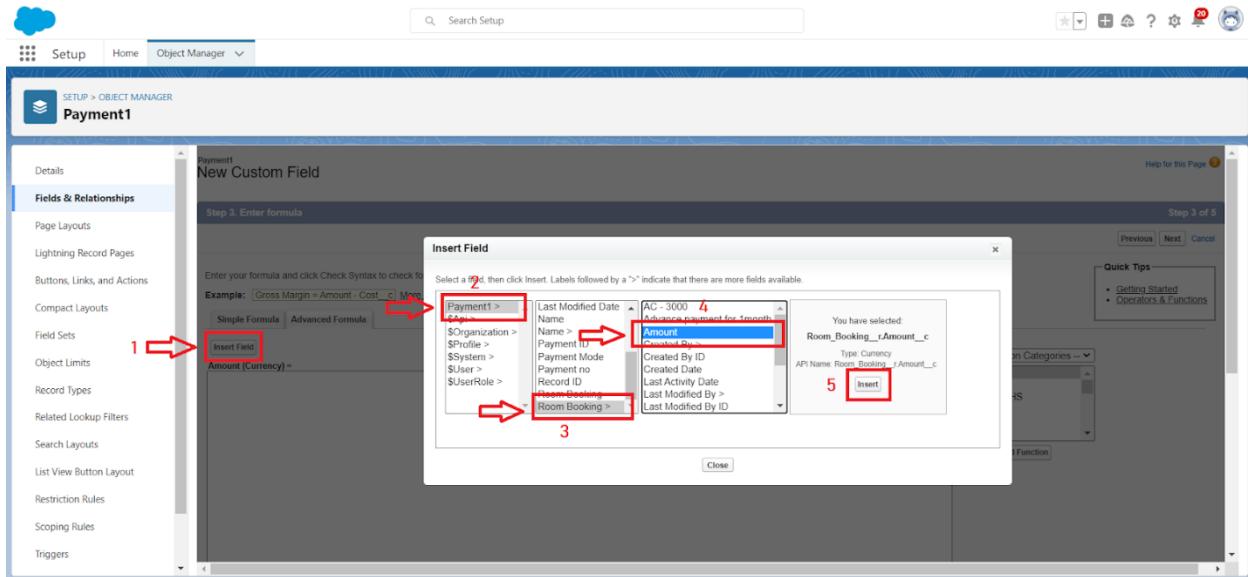
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

5. Enter the Field label: Amount and Field name: gets auto generated and click on Next

6. In the Advanced Formula Click on the Insert field in the popup Screen Select the Payment1 and in the second drop down select the Room Booking and in the three drop down select the Amount field and click on Insert “Room_Booking__r.Amount__c”.

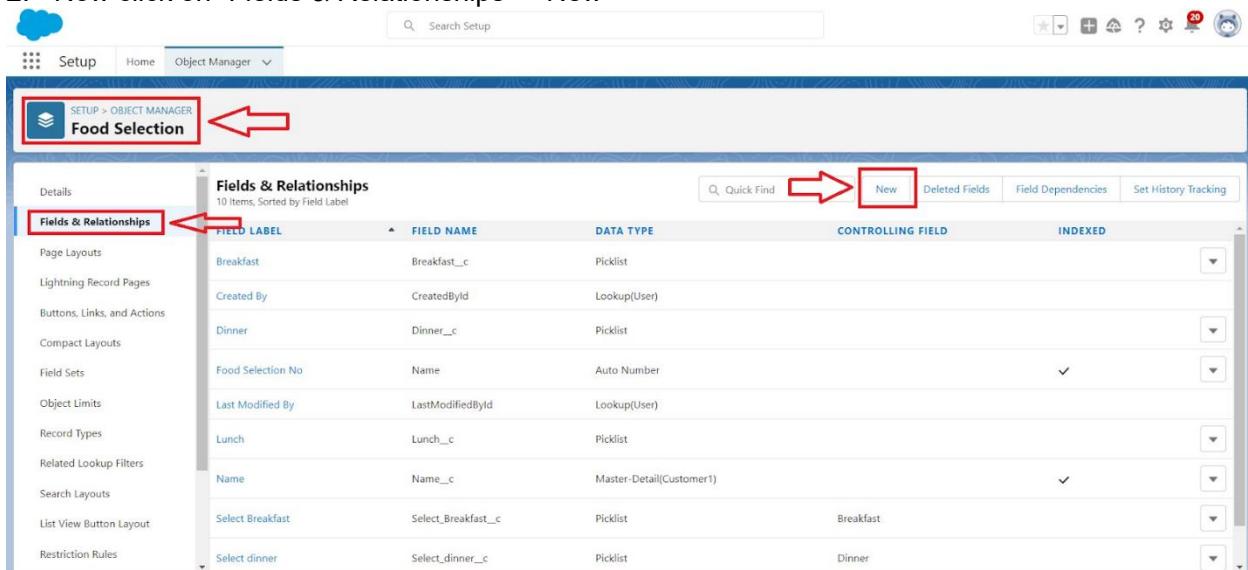


7. Click on the Check syntax: No syntax errors in merge fields
8. Click on Next > Next > Save and new.

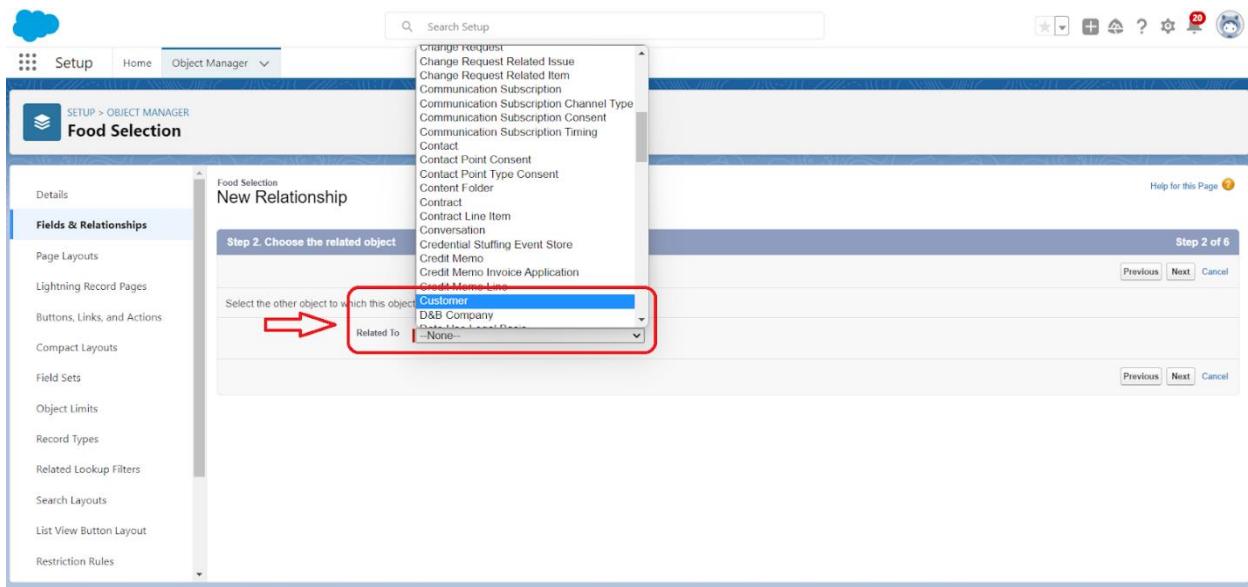
Creation of fields for the Food Selection object

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.
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 Customer1 object and click on Next



6. Fill the Above as following:

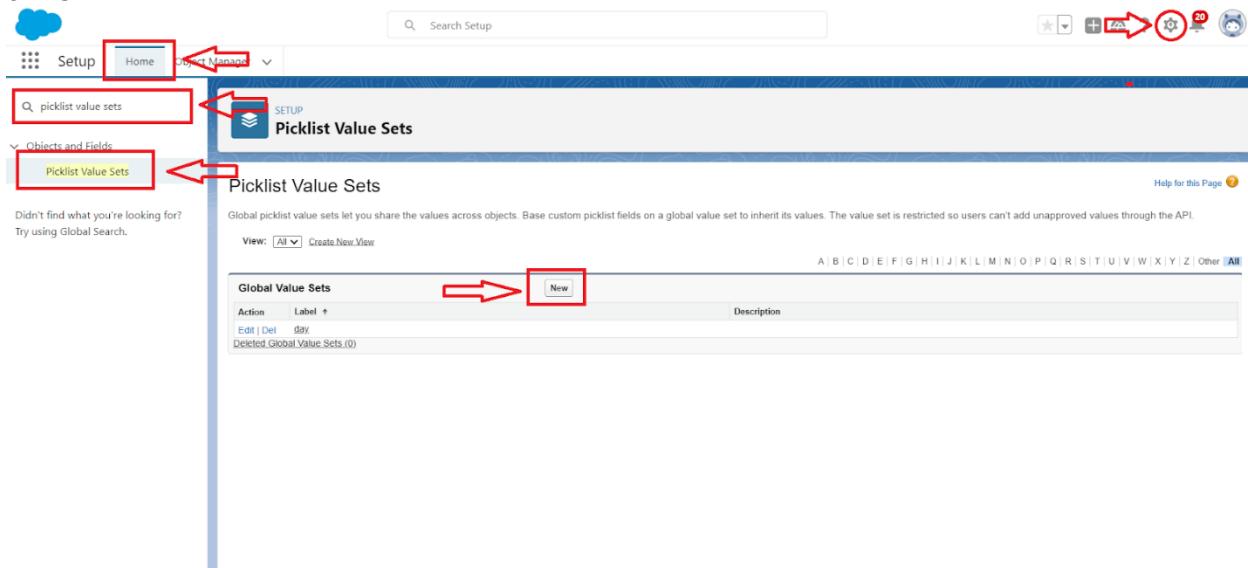
- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

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.

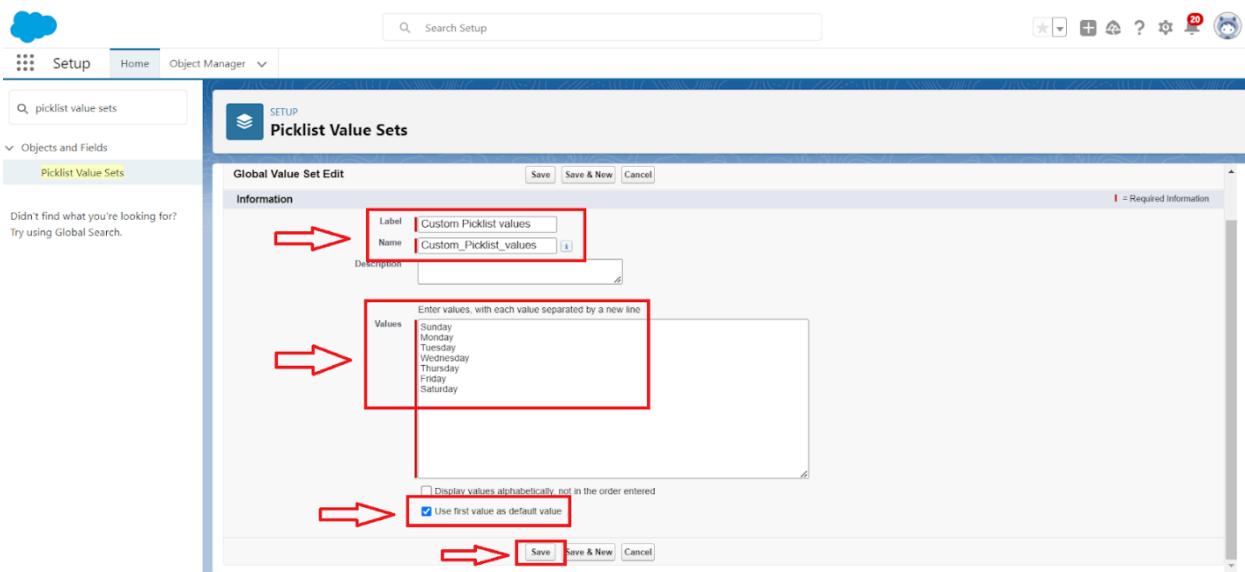
Create a picklist value set:

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

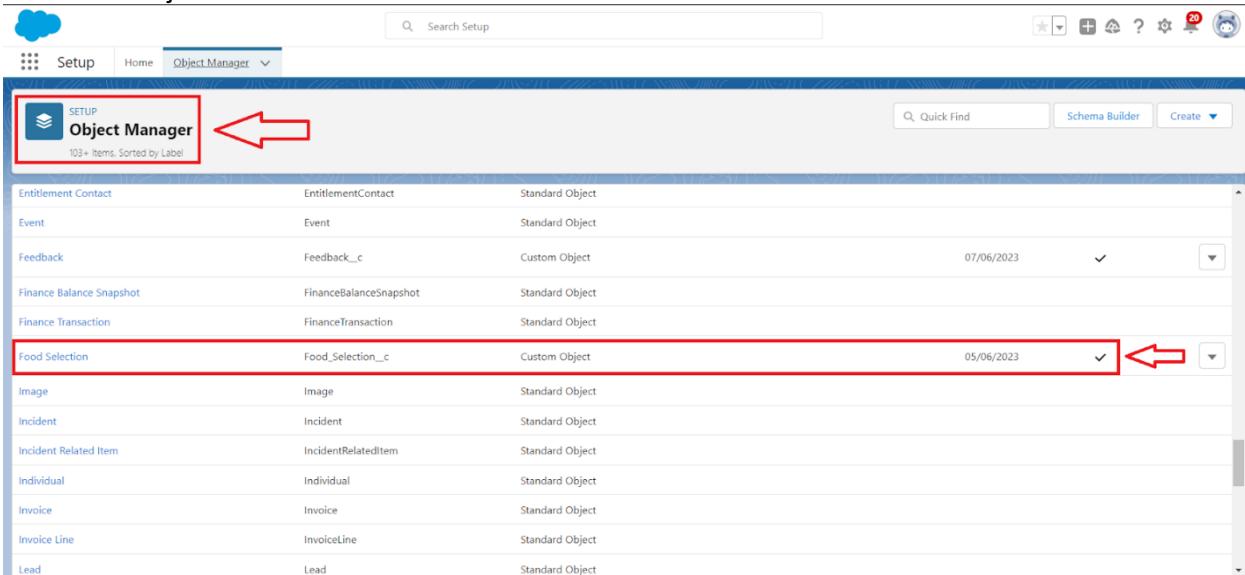


6. Check the Use first value as default value and Click on save.

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.



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

3. Select Data Type as a "Picklist"

The screenshot shows the 'Setup' menu at the top, followed by 'Object Manager' and 'Food Selection'. A search bar says 'Search Setup'. On the left, a sidebar lists various setup categories like 'Fields & Relationships', 'Page Layouts', etc. The main area is titled 'New Custom Field' and 'Step 2. Enter the details'. It shows a 'Field Label' of 'Breakfast' and a 'Values' section where 'Use global picklist value set' is selected. Below that is a dropdown menu with options '-None-' and 'Custom Picklist values'. A note says 'Custom Picklist values are not in the order entered'. Other fields include 'Field Name' (Breakfast), 'Description', 'Help Text', and checkboxes for 'Required' and 'Auto add to custom report type'. At the bottom, there's a 'Show Formula Editor' link and a note about formula syntax. Buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

4. 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 :

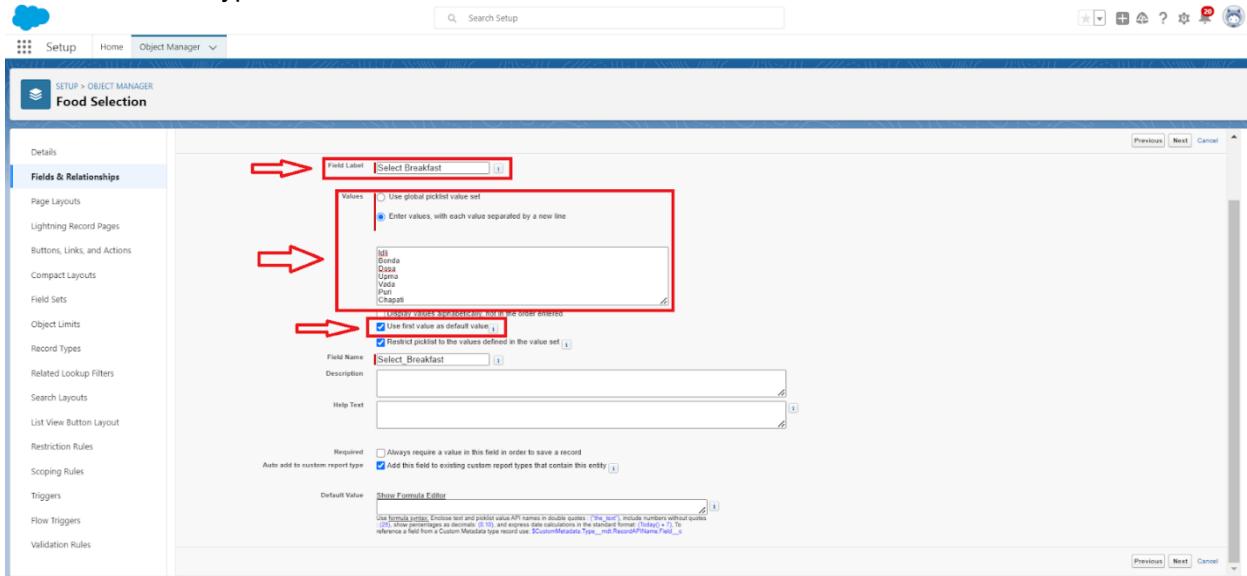
1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.

The screenshot shows the 'Object Manager' screen with a search bar 'Quick Find' and a 'Schema Builder' button. A red box highlights the 'Food Selection' row in the list, and a red arrow points to it. The table lists various objects with their names, types, and last modified dates. The 'Food Selection' row is specifically highlighted.

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		
Food Selection	Food_Selection__c	Custom Object	05/06/2023	✓
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		

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

1. Select Data Type as a “Picklist”



2. Fill the Above as following:

- Field Label: Select Breakfast
- Under Value - Enter values, with each value separated by a new line
 - 5. Idli
 - 6. Bonda
 - 7. Dosa
 - 8. Upma
 - 9. Vada
 - 10. Puri
 - 11. Chapati
- Select Checkbox Use First value as default Value
- Click on Next > Next > Save and new.

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.

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

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
Food Selection	Food_Selection__c	Custom Object
		05/06/2023 ✓
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

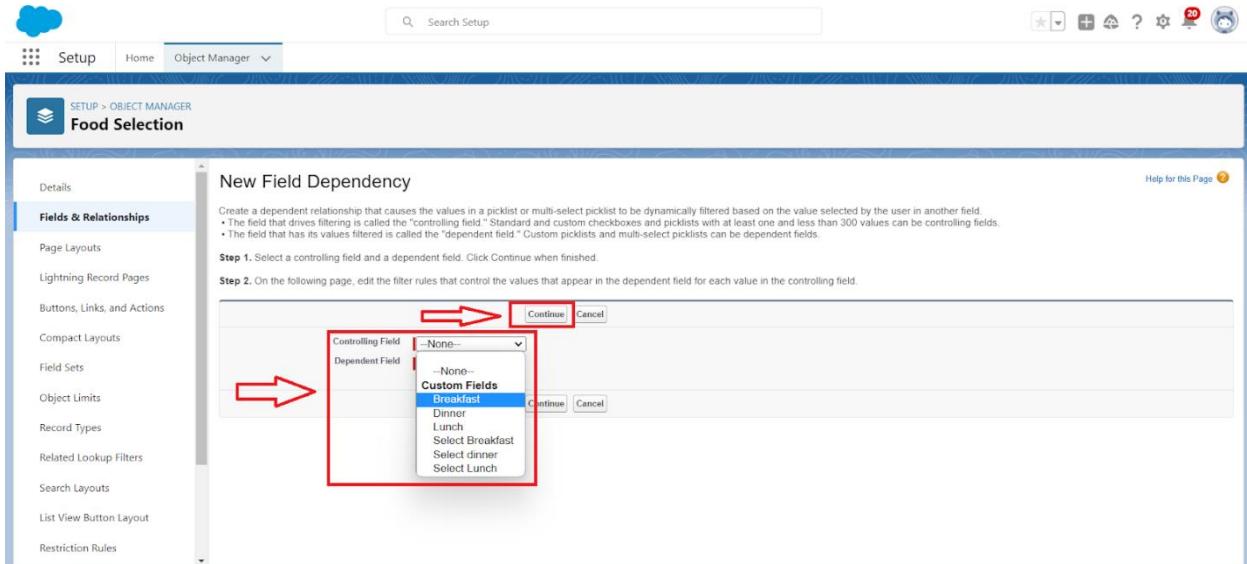
2. Now Click on fields & relationships and Click on Field Dependencies

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	

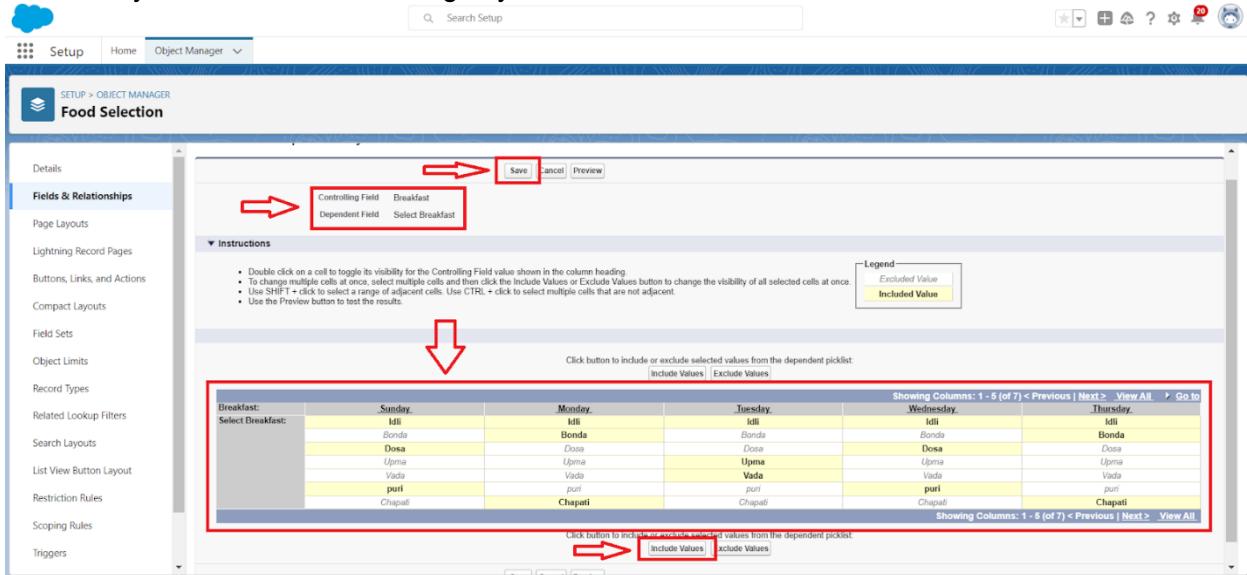
3. Now Click on New Option

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Breakfast	Select Breakfast	Veera Venkata Varaprasad Androthu 07/06/2023, 3:45 pm
Edit Del	Dinner	Select dinner	Veera Venkata Varaprasad Androthu 07/06/2023, 3:55 pm
Edit Del	Lunch	Select Lunch	Veera Venkata Varaprasad Androthu 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.

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
 - Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.
 -

To create a Field dependencies for Dinner and Select Dinner.

15. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
16. Now Click on fields & relationships and Click on Field Dependencies
17. Now Click on New Option
18. Under Controlling Field: Dinner, Dependent Field: Select Dinner and Click on Continue
19. 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.

Creation of fields for the Feedback object

1. create fields & relationship to an object:

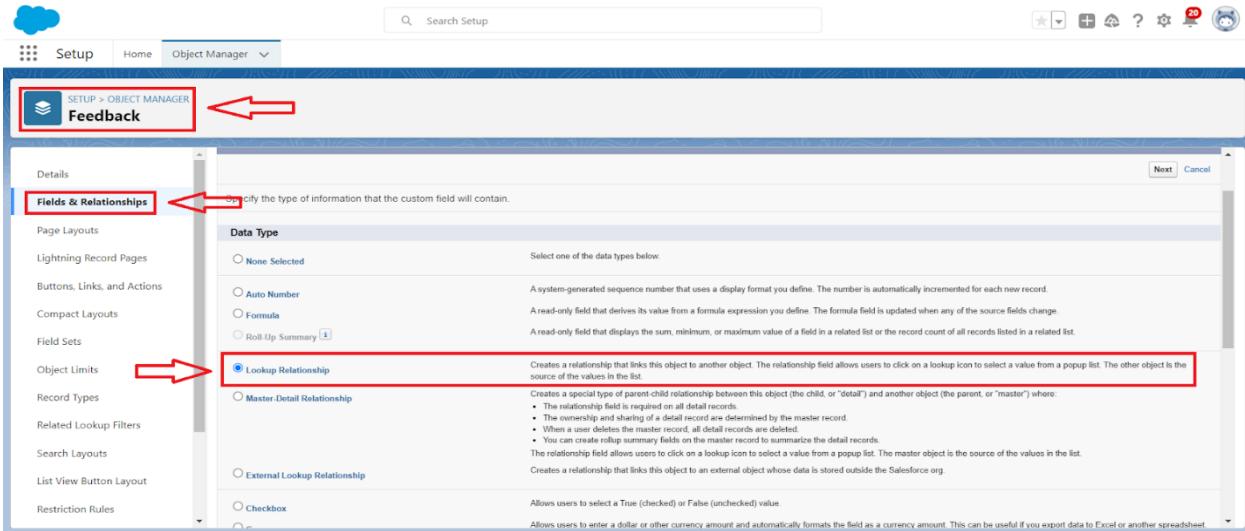
1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New

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

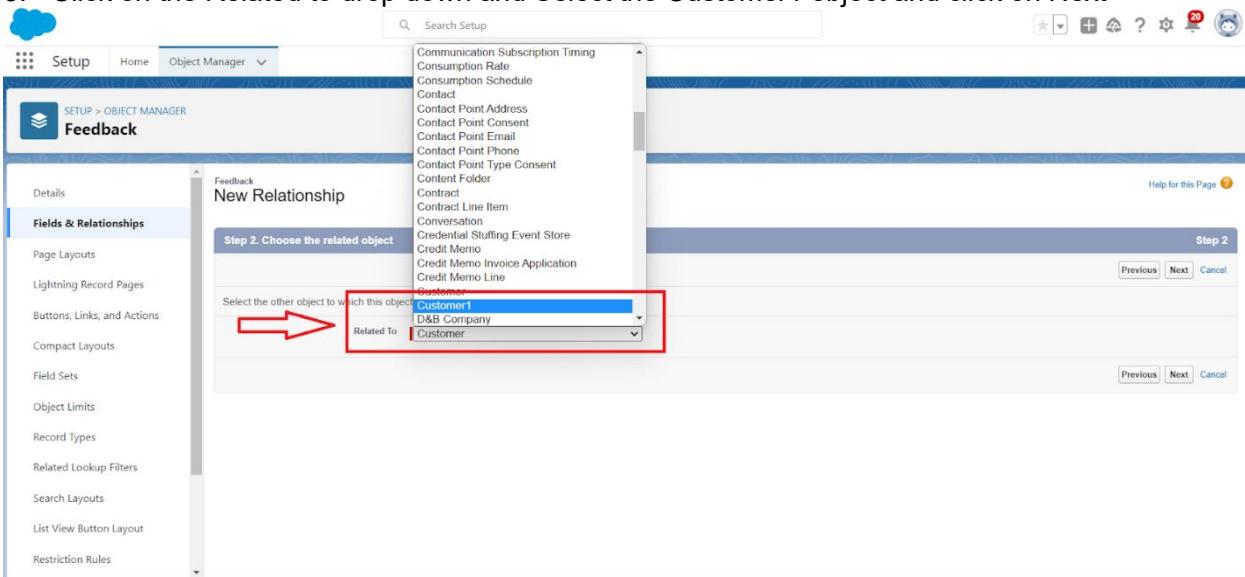
- Setup:** The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.
- Search Bar:** A search bar with the placeholder 'Search Setup'.
- Breadcrumb:** 'SETUP > OBJECT MANAGER' followed by 'Feedback'.
- Left Sidebar:** A sidebar with various options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules.
- Fields & Relationships Tab:** The current tab, highlighted with a red box and an arrow pointing to it.
- New Button:** A red box highlights the 'New' button in the top right corner of the list view.
- List View:** A table showing the 'Fields & Relationships' for the Feedback object. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The rows include:

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

3. Select Data Type as a “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.

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

Field Label: Name
Field Name: Name

Child Relationship Name: Feedbacks1

What to do if the lookup record is deleted?
 Always require a value or this field in order to save a record
 Clear the value of this field. You can't choose this option if you make this field required.
 Don't allow deletion of the lookup record that's part of a lookup relationship.

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

Lookup Filter:
 Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more](#)

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

Step 3 of 6 | Previous | Next | Cancel

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

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

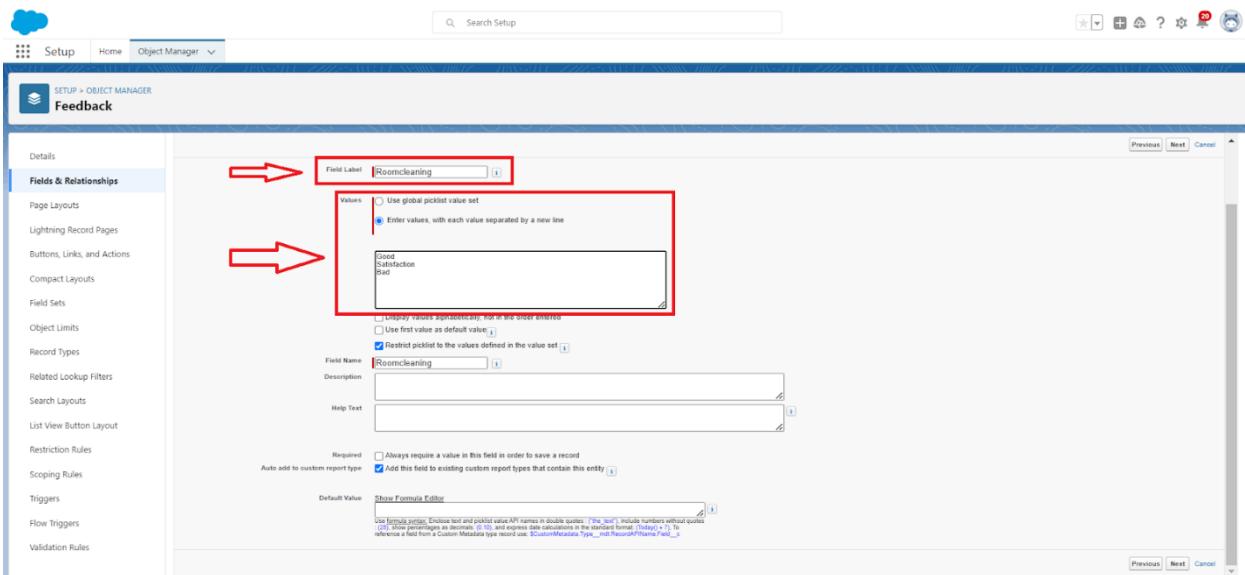
SETUP > OBJECT MANAGER
Feedback

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

Quick Find **New** Deleted Fields Field Dependencies Set History Tracking

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 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.

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar has 'Setup > OBJECT MANAGER' and 'Total Room' selected. On the left, there are links for Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area is titled 'Fields & Relationships' and lists several fields: count (Field Label: count, Field Name: count_c, Data Type: Roll-Up Summary (COUNT Room Booking)), Created By (Field Label: CreatedBy, Field Name: CreatedById, Data Type: Lookup(User)), Last Modified By (Field Label: LastModifiedBy, Field Name: LastModifiedById, Data Type: Lookup(User)), and Owner (Field Label: Owner, Field Name: OwnerId, Data Type: Lookup(User,Group)). A red box highlights the 'Total Room' object name in the search bar, and a red arrow points to the 'New' button in the top right corner of the list view.

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

The screenshot shows the 'New Custom Field' creation wizard. The sidebar includes links for Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main step is 'Step 1. Choose the field type'. It asks to specify the type of information the custom field will contain. Under 'Data Type', the 'Formula' option is selected, highlighted by a red box. A red arrow points to the 'Next' button at the bottom right. Other options shown include 'None Selected', 'Auto Number', 'Roll-Up Summary', 'Lookup Relationship', and 'Master-Detail Relationship'. A note states: 'Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.' and 'The relationship field is required on all detail records.'

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

SETUP > OBJECT MANAGER
Total Room

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

Field Label: Rooms Available
Field Name: Rooms_Available 4

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

Formula Return Type
 None Selected
 Checkbox
 Currency
 Date
 Date/Time
 Number 5
 Percent
 Text
 Time
 Options
 Select one of the data types below.
 Calculate a boolean value
 Example: `TODAY() = CloseDate`
 Calculate a dollar or other currency amount and automatically format the field as a currency amount
 Example: `(Gross Margin - Amount) / Cost__c`
 Calculate a date, for example, by adding or subtracting days to other dates.
 Example: `Reminder Date = CloseDate - 7`
 Calculate a datetime, for example, by adding a number of hours or days to another datetime.
 Example: `Next = TODAY() + 1`
 Calculate a numeric value
 Example: `FarmerHect = 1.8 * Celcius__c + 32`
 Calculate a percent and automatically add the percent sign to the number.
 Example: `(Discount__c * (Amount - Discounted_Amount__c)) / Amount`
 Create a time, for example, by adding a number of hours to another time
 Example: `(Full Name = LastName $, "First Name")`
 Calculate a time, for example, by adding a number of hours to another time
 Example: `Next = TIMEVALUE(NOW() + 1)`

Decimal Places: 0 Example: 999 6

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.

Validation rule

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

create a validation rule to an Room 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 “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)

SETUP > OBJECT MANAGER
Room Booking

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

Validation Rule Edit
 Rule Name: checkbox_field
 Active:
 Description: checkbox field is equal to false then only the record should be save.
 Error Condition Formula
 Example: `Discount_Percent__c < 0.10` Main Principles
 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: Advance_payment_for_1month__c = false
 Functions
 All Function Categories ->
 ABS
 ADDMONTHS
 AND
 ASCII
 ASIN
 DATE
 DAY
 DEGREES
 ERROR
 IF
 INT
 ISBLANK
 ISNUMBER
 REFERENCE
 REVERSE
 SIGN
 TIME
 TIMEZONE
 TRUNC
 WEEKDAY
 YEAR
 ZONE
 Check Syntax
 Error Message
 Example: `Discount_percent > 30%`
 This message will appear when Error Condition formula is true.
 Error Message: Checkbox 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/Advance payment for 1month

7. Click on save.

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)

The screenshot shows the 'Validation Rule' creation screen in Salesforce. The 'Rule Name' field is 'check_in_rule' (1). The 'Active' checkbox is checked. In the 'Error Condition Formula' section, the formula 'Check_in__c = False' is entered (2). Below it, the 'Error Message' is 'Check box should be checked' (3). The 'Error Location' is set to 'Field' and 'Check in' (4). A sidebar on the right contains 'Quick Tips' and 'Operators & Functions'.

7. Click on save.

Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of 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.

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 header with a person icon and the word 'SETUP'. Below it, the section title 'Profiles' is displayed. The main area is titled 'Clone Profile' with the sub-instruction 'Enter the name of the new profile.' A note at the top says 'You must select an existing profile to clone from.' There are two tabs: 'Existing Profile' (selected) and 'Standard User'. Under 'User License', 'Salesforce' is chosen. The 'Profile Name' field contains 'Custom user', which is highlighted with a red box and has a red arrow pointing to it. At the bottom right are 'Save' and 'Cancel' buttons, with another 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. At the top, there's a header with a person icon and the word 'SETUP'. Below it, the section title 'Profiles' is displayed. The main area shows a table for 'Basic Access' and 'Data Administration' permissions across various objects: Customers, Feedbacks, Food Selections, Payments, Room Bookings, and Total Rooms. The 'Basic Access' section includes 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All' checkboxes. The 'Data Administration' section includes 'View All' and 'Modify All' checkboxes. Red boxes and arrows highlight these permission sections for each object. Below the table are 'Session Settings' and 'Password Policies' sections, which are also partially highlighted with red boxes.

5. Scroll down and Click on Save.

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

	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"/>				

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
- Obscure secret answer for password resets:
- Require a minimum 1 day password lifetime:

5. Scroll down and Click on Save.

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.

Basic Access

	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"/>

Data Administration

	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
- Obscure secret answer for password resets:
- Require a minimum 1 day password lifetime:

5. Scroll down and Click on Save.

Roles

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

Marketing Role

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

Your Organization's Role Hierarchy

Collapse All **Expand All**

- Nick Enterprises
 - Add Role
 - CEO [Edit](#) | [Del](#) | [Assign](#)
 - Add Role **Marketing**
 - HR [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Manager [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - On Site Emp [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Remote Emp [Edit](#) | [Del](#) | [Assign](#)
 - Add Role

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

SETUP Roles

Role Edit New Role Help for this Page

Role Edit

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

Save Save & New Cancel

4. Then click on Save.

Receptionist Role

1. Go to quick find > Search for Roles > click on set up roles.
2. Click on Expand All and click on add role under CEO role.
3. Give Label as "Receptionist" and Role name gets auto populated.

SETUP Roles

Role Edit New Role Help for this Page

Role Edit

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

Save Save & New Cancel

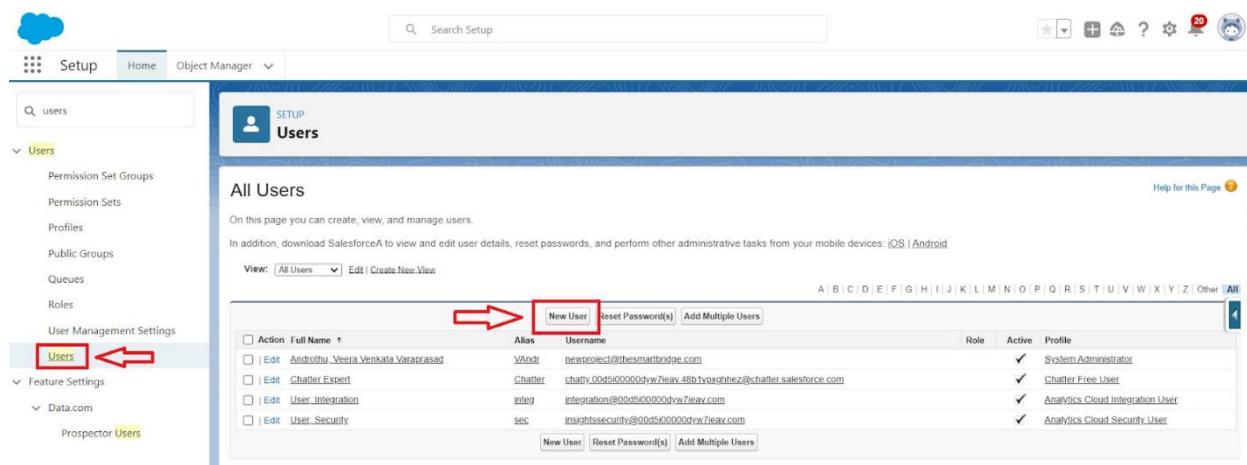
4. Then click on Save.

Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Create User

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



The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Management Settings', the 'Users' link is highlighted with a red box and a red arrow pointing to it. On the main page, there is a table listing users. At the top of the table, there are three buttons: 'New User' (highlighted with a red box and a red arrow), 'Reset Password(s)', and 'Add Multiple Users'. The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. Several user entries are listed, each with edit and delete options.

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

3.save.

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

3.save

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

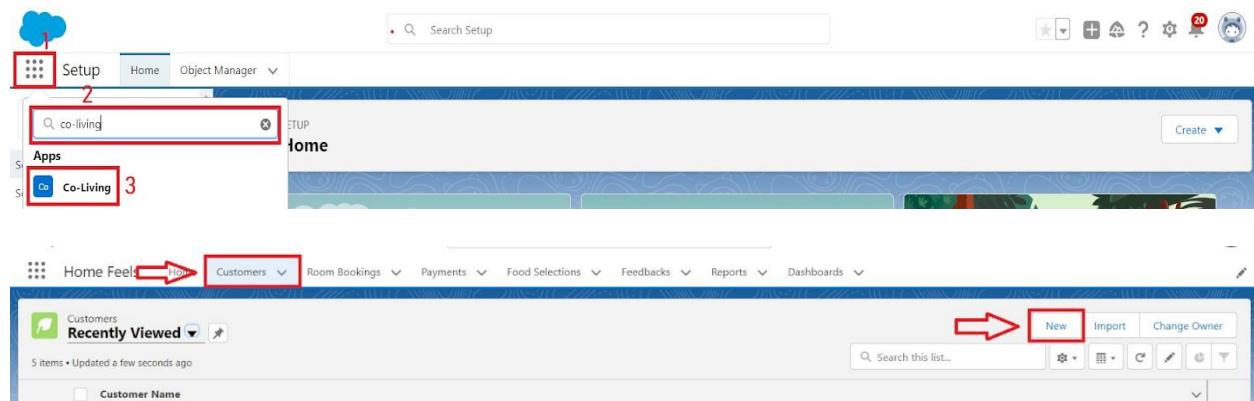
3.Save

User Adoption

Create a Record (Customers)

1.Click on App Launcher on the left side of the screen.

2.Search Home Feels & click on it.



3.Click on the Customers Tab.

4.Click new and fill details & Save

View a Record (Customers)

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

Customer1
sandeep

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

Delete a Record (Customers)

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

Customers
Recently Viewed ▾

Customer Name
<input type="checkbox"/> sandeep 2
<input type="checkbox"/> Abhilash
<input type="checkbox"/> Ganesh
<input type="checkbox"/> suman
<input type="checkbox"/> Prasad

New Import Change Owner

Search this list... 3

4 Delete

Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

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

Create Report

1. Go to the app > click on the reports tab
2. Click New Report.

The screenshot shows the 'Reports' section of the Co-Living app. The top navigation bar includes 'Home', 'Customers', 'Room Bookings', 'Payments', 'Food Selections', 'Feedbacks', 'Reports' (which is highlighted with a red box), and 'Dashboards'. Below the navigation is a search bar with placeholder 'Search recent reports...'. A red box highlights the 'New Report' button in the top right of the report list area. The report list table has columns: REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. There are four rows: 'Recent' (Room booking report, custom report, Veera Venkata Varaprasad Androthu, 14/6/2023, 2:58 pm), 'Created by Me' (Room booking report, Private Reports, Veera Venkata Varaprasad Androthu, 7/6/2023, 4:53 pm), 'Private Reports' (Sample Flow Report: Screen Flows, Public Reports, Automated Process, 5/6/2023, 10:09 am), and 'All Reports'.

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

The screenshot shows the report configuration interface for 'Customers with Room Bookings with Payments'. The left sidebar has 'REPORT' and 'Room booking report' selected. It includes 'Outline', 'Filters', 'Fields' (with 'Groups' and 'Columns' sections), and 'Row Counts', 'Detail Rows', 'Subtotals', 'Grand Total' buttons. The main area shows a preview of the report data with columns: Customer Name, Room No, Phone no, Email id, Permanent Address, current Status, Room sharing, Advance payment for 1month, AC - 3000, and Amount. The data includes rows for RN-006 (abhi@gmail.com, Chandravaram, Employee, single sharing - 14000, checked, unchecked, ₹25,000), Ganesh (ganesh@gmail.com, Tadipparu, Student, Triple sharing - 10000, checked, unchecked, ₹20,000), Prasad (varaprasadandrothu@gmail.com, Tadipparu, Employee, single sharing - 14000, checked, checked, ₹34,000), Sandeep (sandeep@gmail.com, Hyderabad, Employee, Triple sharing - 10000, checked, unchecked, ₹20,000), Suman (suman@gmail.com, Ichapuram, Employee, Double sharing - 12000, checked, checked, ₹30,000), and a total row (6, 2, ₹156,000). The top right has 'Save' (highlighted with a red box), 'Run', and other buttons.

6. Save or run it.

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.

Dashboards

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

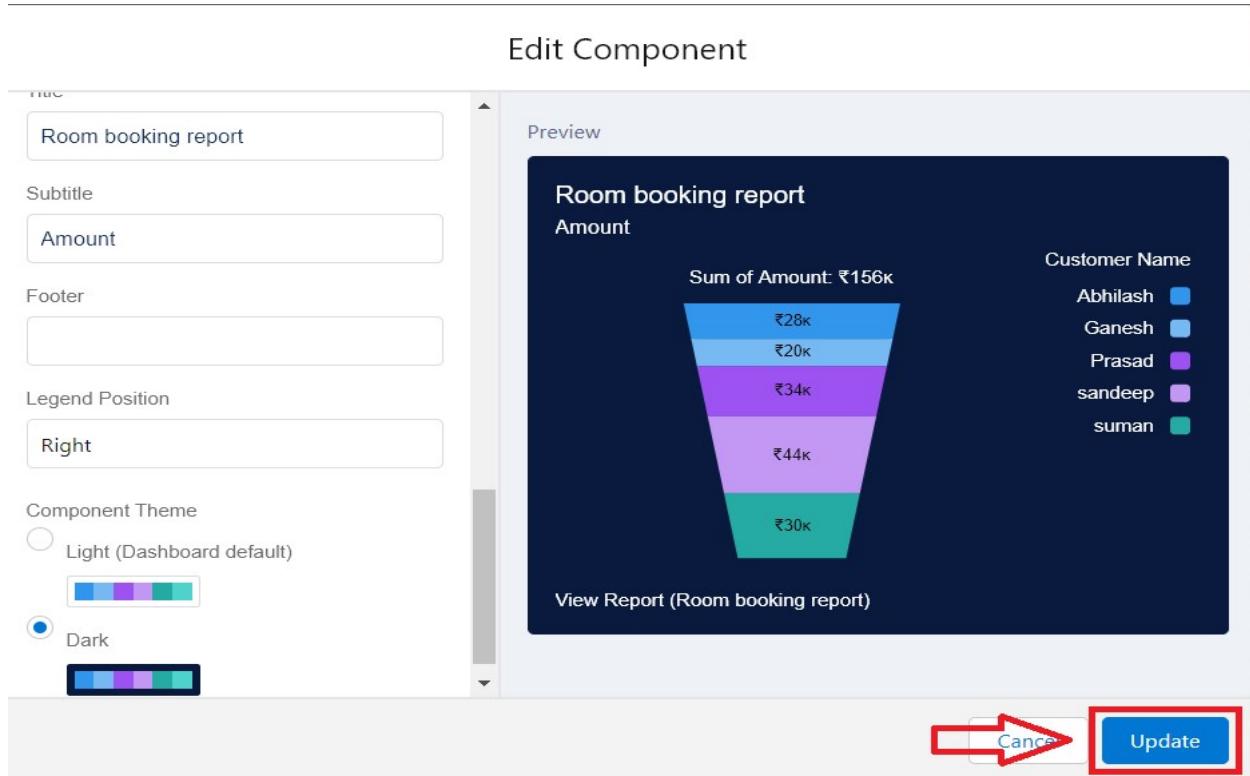
Create Dashboard

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

The screenshot shows the Co-Living application's navigation bar with various tabs like Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Dashboards' tab is highlighted with a red box and the number '1'. Below the navigation bar is a search bar and a toolbar with icons for star, plus, cloud, question mark, gear, and a user profile. The main area shows a list of recent dashboards with a 'New Dashboard' button highlighted by a red box and the number '2'.

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

The screenshot shows a 'Select Report' dialog box. On the left 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. A red box highlights the 'Room booking report' entry, which includes the creator's name (Veera Venkata Varaprasad Androthu) and creation date (14-Jun-2023, 2:58 pm). Another red box highlights the 'Select' button at the bottom right of the dialog.



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

Create Another Dashboard

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

Flows

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

Why do we need to create a flow:

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

Create a Flow

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

Search Setup

Q flows 1

Process Automation 2

Flows 3

Flow Trigger Explorer

New Flow

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

New Flow

Core All + Templates

Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.

Record-Triggered Flow 1
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.

Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

Create 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.

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

The screenshot shows the 'New Decision' configuration screen. At the top, there are fields for 'Label' (Field Should be Update) and 'API Name' (Field_Should_be_Update). Below these, a 'Description' field contains the number '1'. The main area is titled 'Outcomes' with the sub-instruction: '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.' A red box highlights the 'OUTCOME ORDER' section, which contains a '+' button (labeled 1). Another red box highlights the 'OUTCOME DETAILS' section, which includes a 'Label' field ('Single Sharing') and an 'API Name' field ('Single_Sharing'). A red box labeled 2 surrounds the outcome details. A red box labeled 3 surrounds the condition requirements: 'All Conditions Are Met (AND)' followed by two conditions. The first condition is 'Resource: \$Record > Room sharing, Operator: Equals, Value: single sharing'. The second condition is 'AND Resource: \$Record > AC - 3000, Operator: Equals, Value: False'. A red box labeled 4 highlights the 'Single Sharing' label in the outcome details. At the bottom right are 'Cancel' and 'Done' buttons.

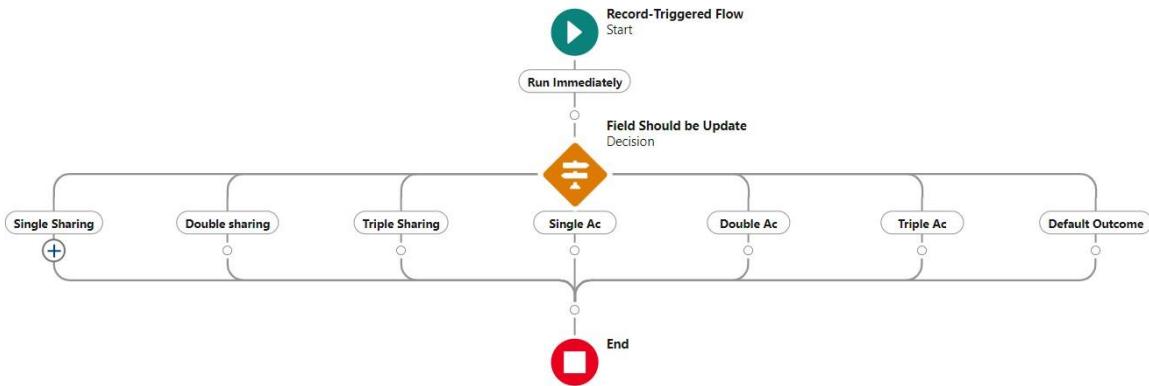
9. Enter the Outcome Details Label: Double sharing, Outcome API name: Gets Automatically Generated.

- 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.
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.
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.
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.



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.
16. 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.
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.
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.

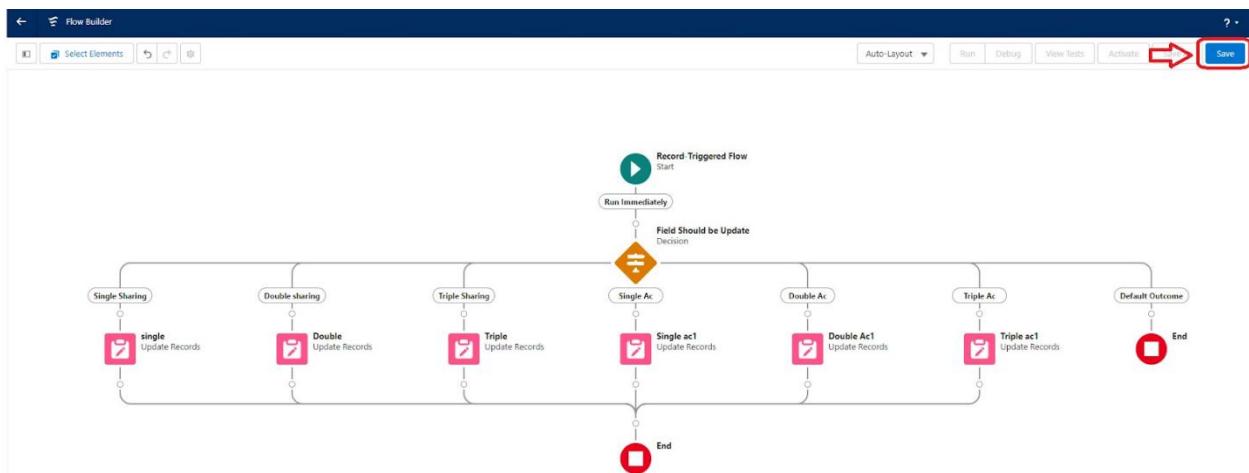
19. Enter the update records details

- Label: Double ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 30000.
- Click on Done.

20. Enter the update records details

- Label: Triple ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 26000.
- Click on Done.

21. 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.

Conclusion:

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

Moreover, the feedback feature will empower residents to provide insights into the quality of services, such as room cleaning, internet connectivity, and food services, which will help maintain and improve service standards. Overall, this CRM system will not only foster a seamless living experience but also reinforce the values of collaboration, comfort, and community that are at the core of the co-living concept. By balancing privacy and communal living, the application will support the creation of a vibrant and inclusive environment, allowing individuals to connect, thrive, and enhance their quality of life.