# A CRM Application to Manage the Booking of Co-Living

## Project Description:

Our co-living space project aims to create a vibrant and inclusive community where individuals can live, work, and connect with like-minded people. We believe that living together in a shared environment fosters collaboration, reduces isolation, and enhances the overall quality of life.

The co-living space will feature a carefully designed layout that balances privacy and communal areas. Co-living Space is an application where customer Details is stored in order to choose the different AC rooms with Multiple Sharing. Special foods items will be selected by the user in Daily and make Payments in different modes. And Also give the feedback of the service like Room cleaning, internet connection and foods etc…

A CRM application for managing the booking of co-living spaces streamlines the rental process by integrating user profiles, real-time booking management, communication tools, payment processing, and property management features into a single platform.

This application enhances efficiency by automating bookings and payments, improves tenant experience through clear communication and quick maintenance response, and increases revenue with better occupancy management and marketing tools. Suitable for both small landlords and large property management companies, it offers scalable solutions with secure data storage and compliance with data protection regulations, ultimately leading to improved organization, tenant satisfaction, and profitability.

In this document, we will see how we create a A CRM Application to Manage the Booking of Co-Living Hostel. We are using SalesForce Org for creating the application. By following this Tasks we can create the application.

## Implementation

This project involves 15 different tasks to build A CRM Application to Manage the Booking of Co-Living.

The tasks are :

- **Account Creation**
- **Activation**
- **Object**
- **Tab**
- **The Lightning App**
- **Fields & Relationships**
- **Validation rule**
- **Profile**
- **Roles**
- **Users**
- **User Adoption**
- **Reports**
- **Dashboards**
- **Creating Flow**
- **Testing Flow**

In this project we will see how to perform and complete each task to build an Application for managing the booking of a Co-Living hostel..

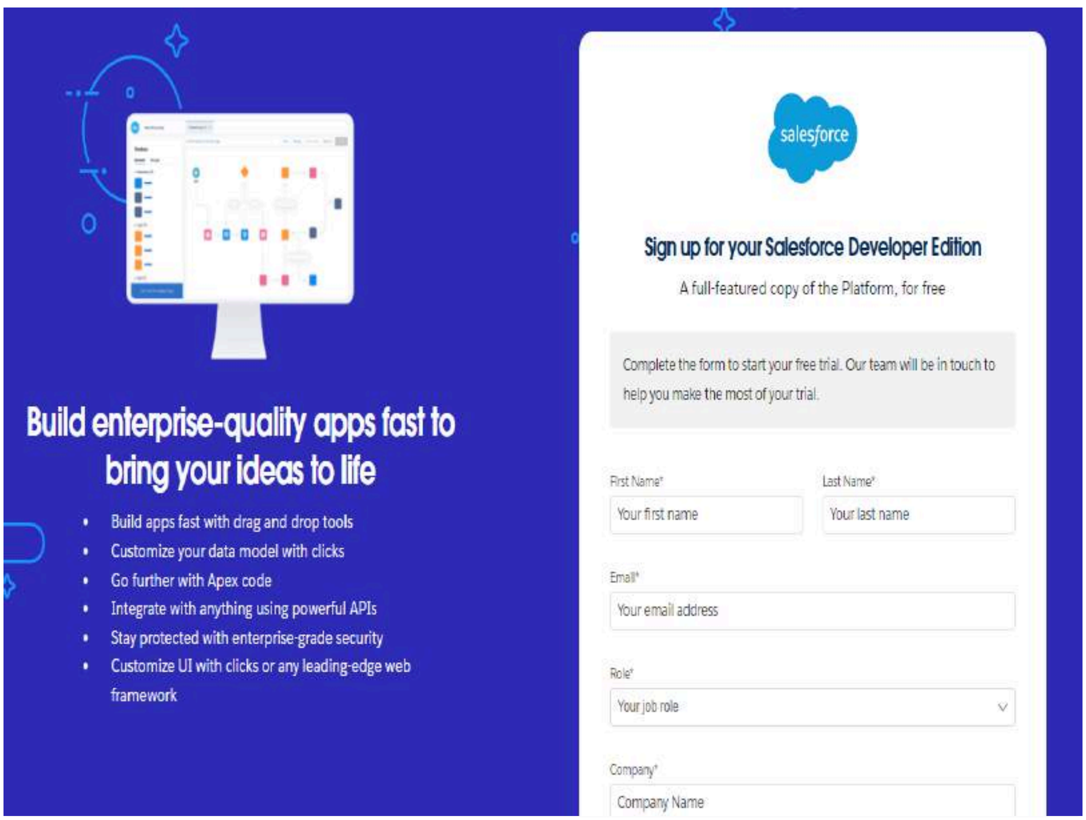
## Task 1 : DEVELOPER ACCOUNT CREATION

Creating a developer org in salesforce.

**Step 1 :** Go to https://developer.salesforce.com/signup

**Step 2 :** On the sign up form, enter the following details

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

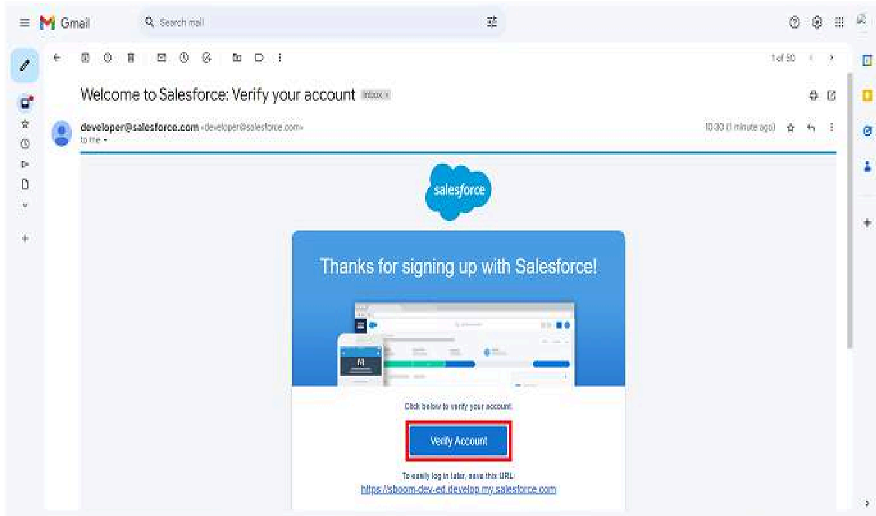


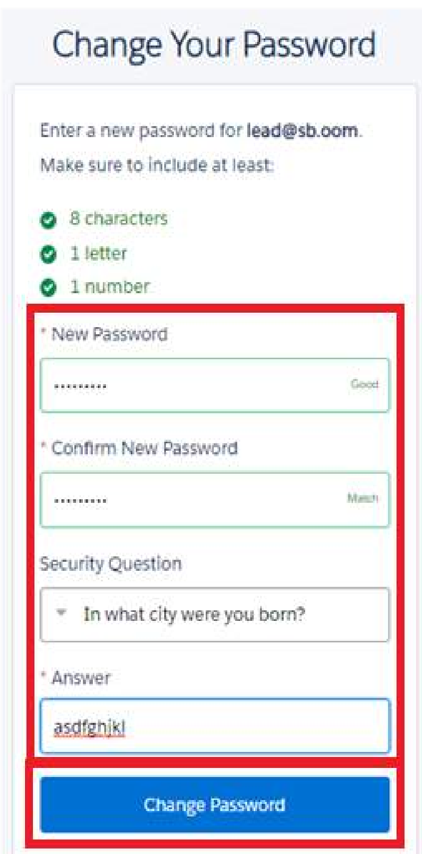

## Note:

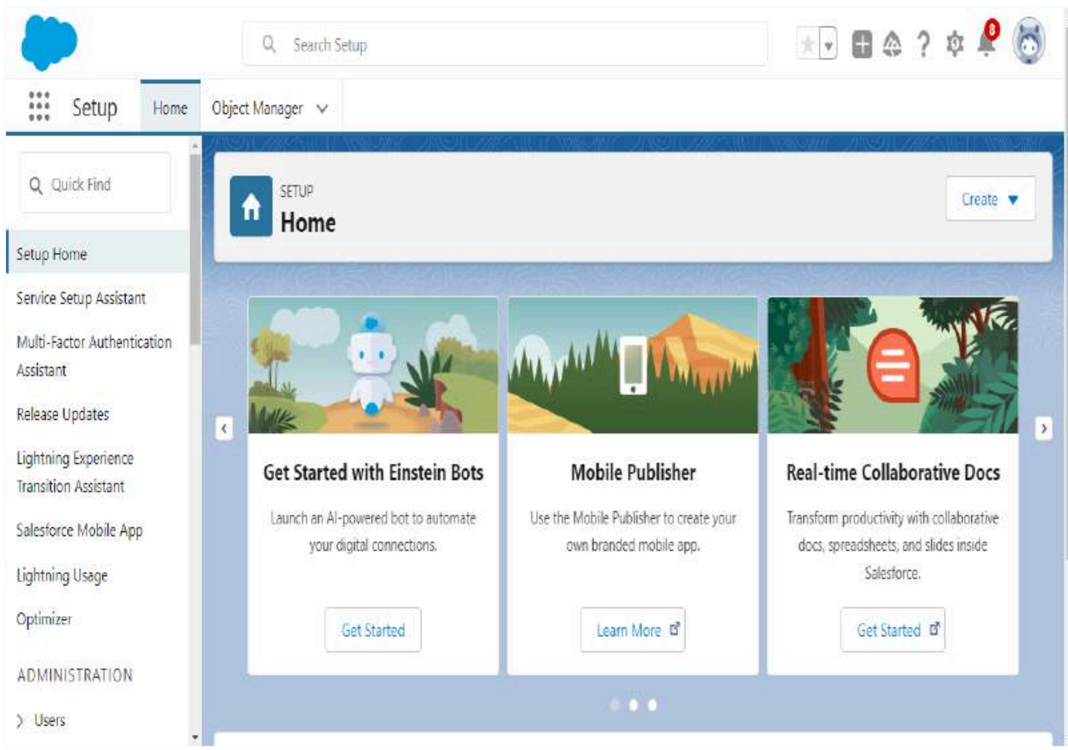
- Username : should be a combination of your name and company
  This need not be an actual email id, you can give anything in the format : **username@organization.com**
- Click on sign me up after filling these.
- And wait for minimum of 5 - 10 mins to get the activation link to your registered mail id.

# Task 2 : ACCOUNT ACTIVATION

**Step1 :** Go to the inbox of the email that you used while signing up.
**Step2 :** Click on the verify account to activate your account. The email may take 5-10mins.
**Step 3 :** Click on Verify Account
**Step 4 :** Give a password and answer a security question and click on change password.
**Step 5 :** when you will redirect to your salesforce setup page.
You can refer to the below screenshots for references.



# Task 3 : OBJECTS CREATION

## OBJECT 1 : Create a custom object for Total Rooms:

To create a custom object, follow these steps:

**Step 1 :** From setup click on object manager.

**Step 2 :** Click create, select custom object.

**Step 3 :** Fill in the label as " Total Room ".

**Step 4 :** Fill in the plural label as " Total Rooms ".

**Step 5 :** Record name: "Total No Of Rooms"

**Step 6 :** Select the data type as "Text".

**Step 7 :** In the Optional Features section, select Allow Reports and Track Field History.

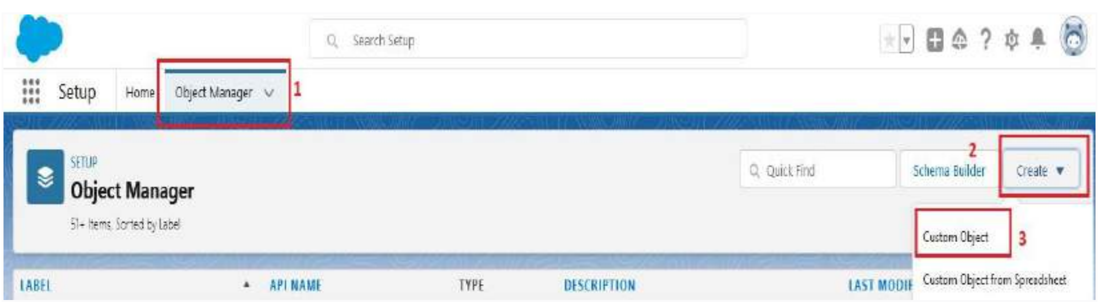
**Step 8 :** In the Deployment Status section, ensure Deployed is selected.

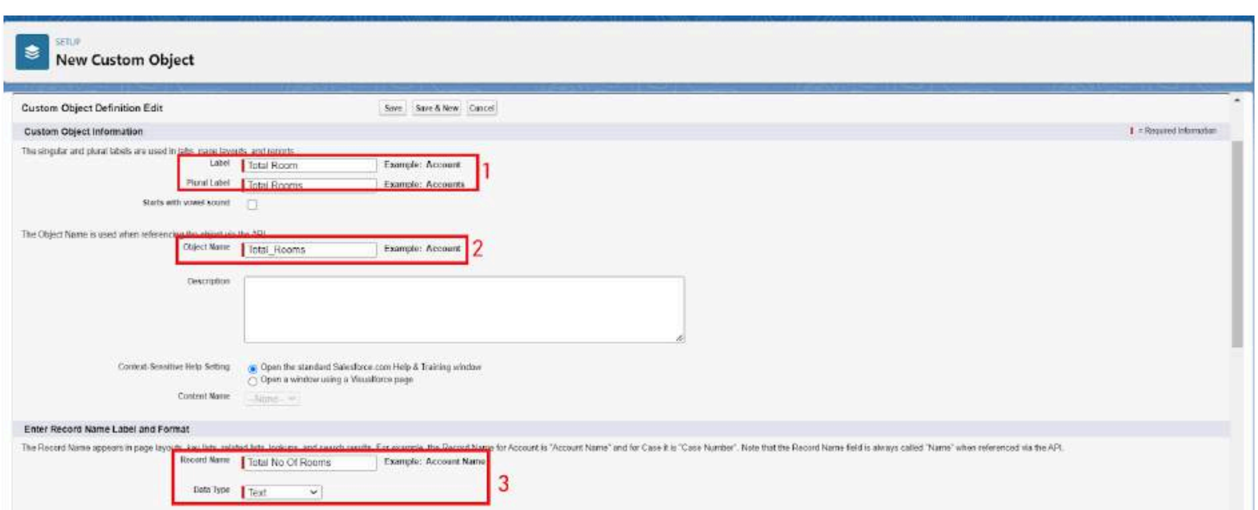
**Step 9 :** In the Search Status section, select Allow Search.

**Step 10 :** In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

**Step 11 :** Leave everything else as is, and click Save.

You can refer to the below screenshots for references.

**OBJECT 2 : Create a custom object for Customer**

To create a custom object, follow these steps:

**Step 1 :** From setup click on object manager.

**Step 2 :** Click create, select custom object.

**Step 3 :** Fill in the label as " Customer1 ".

**Step 4 :** Fill in the plural label as " Customers ".

**Step 5 :** Record name: "Customer Name"

**Step 6 :** Select the data type as "Text".

**Step 7 :** In the Optional Features section, select Allow Reports and Track Field History.

**Step 8 :** In the Deployment Status section, ensure Deployed is selected.

**Step 9 :** In the Search Status section, select Allow Search.

**Step 10 :** In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

**Step 11 :** Leave everything else as is, and click Save.

**OBJECT 3 : Create a custom object for Room Booking**

To create a custom object, follow these steps:

**Step 1 :** From setup click on object manager.

**Step 2 :** Click create, select custom object.

**Step 3 :** Fill in the label as " Room Booking ".

**Step 4 :** Fill in the plural label as " Room Bookings ".

**Step 5 :** Record name: "Room No "

**Step 6 :** Select the data type as "Auto number ".

**Step 7 :** Under Display format enter RN-{000}

**Step 8 :** Enter starting Number as 1

**Step 9 :** In the Optional Features section, select Allow Reports and Track Field History.

**Step 10 :** In the Deployment Status section, ensure Deployed is selected.

**Step 11 :** In the Search Status section, select Allow Search.

**Step 12 :** In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

**Step 13 :** Leave everything else as is, and click Save.

**OBJECT 4 : Create a custom object for Payment**

To create a custom object, follow these steps:

**Step 1 :** From setup click on object manager.

**Step 2 :** Click create, select custom object.

**Step 3 :** Fill in the label as " Payment1".

**Step 4 :** Fill in the plural label as " Payments ".

**Step 5 :** Record name: "Payment No "

**Step 6 :** Select the data type as "Auto number ".

**Step 7 :** Under Display format enter PNO-{000}

**Step 8 :** Enter starting Number as 1

**Step 9 :** In the Optional Features section, select Allow Reports and Track Field History.

**Step 10 :** In the Deployment Status section, ensure Deployed is selected.

**Step 11 :** In the Search Status section, select Allow Search.

**Step 12 :** In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

**Step 13 :** Leave everything else as is, and click Save.

**OBJECT 5 : Create a custom object for Food Selection**

To create a custom object, follow these steps:

**Step 1 :** From setup click on object manager.

**Step 2 :** Click create, select custom object.

**Step 3 :** Fill in the label as " Food Selection ".

**Step 4 :** Fill in the plural label as " Food Selections ".

**Step 5 :** Record name: " Food Selection No "

**Step 6 :** Select the data type as "Auto number ".

**Step 7 :** Under Display format enter FS No-{000}

**Step 8 :** Enter starting Number as 1

**Step 9 :** In the Optional Features section, select Allow Reports and Track Field History.

**Step 10 :** In the Deployment Status section, ensure Deployed is selected.

**Step 11 :** In the Search Status section, select Allow Search.

**Step 12 :** In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

**Step 13 :** Leave everything else as is, and click Save.

**OBJECT 6 : Create a custom object for Feedback**

To create a custom object, follow these steps:

**Step 1 :** From setup click on object manager.

**Step 2 :** Click create, select custom object.

**Step 3 :** Fill in the label as " Feedback ".

**Step 4 :** Fill in the plural label as " Feedbacks ".

**Step 5 :** Record name: "Feedback No "

**Step 6 :** Select the data type as "Auto number ".

**Step 7 :** Under Display format enter Fd No-{0000}

**Step 8 :** Enter starting Number as 1

**Step 9 :** In the Optional Features section, select Allow Reports and Track Field History.

**Step 10 :** In the Deployment Status section, ensure Deployed is selected.

**Step 11 :** In the Search Status section, select Allow Search.

**Step 12 :** In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

**Step 13 :** Leave everything else as is, and click Save.

# Task 4 : TAB CREATION

## TAB 1 : Creating a Tab for Total Rooms

To create a Tab for Total Rooms follow these steps :

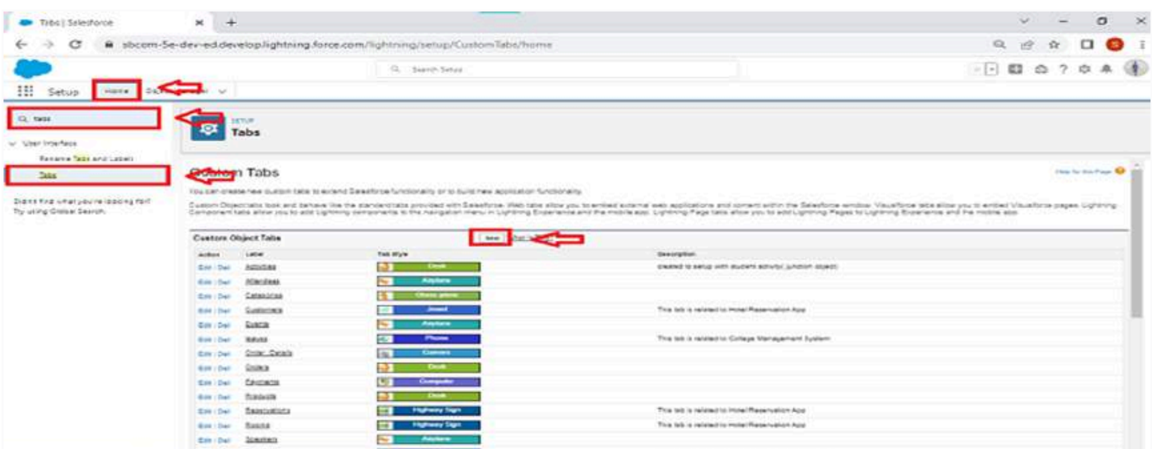
**Step 1 :** Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)

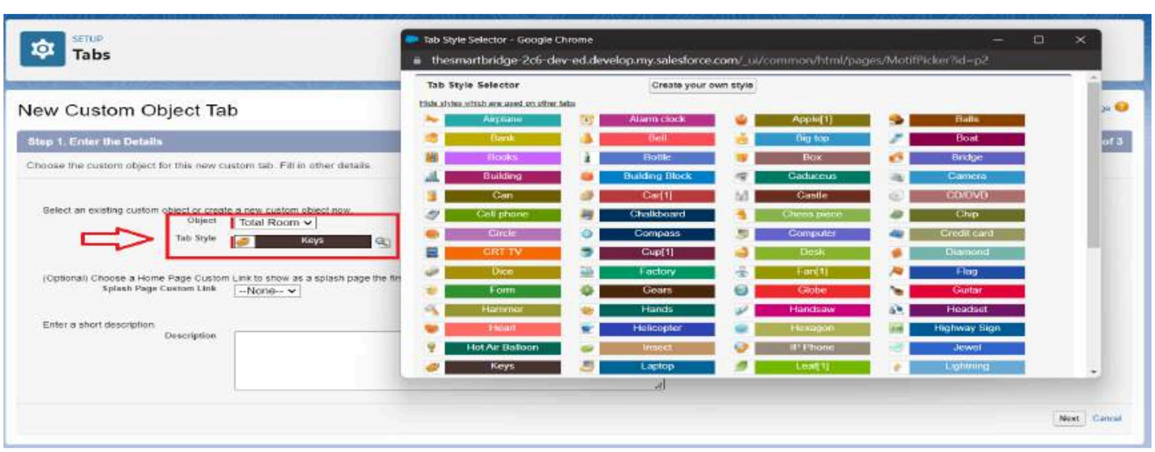
**Step 2 :** Select Object(Total Rooms) > Select the tab style.

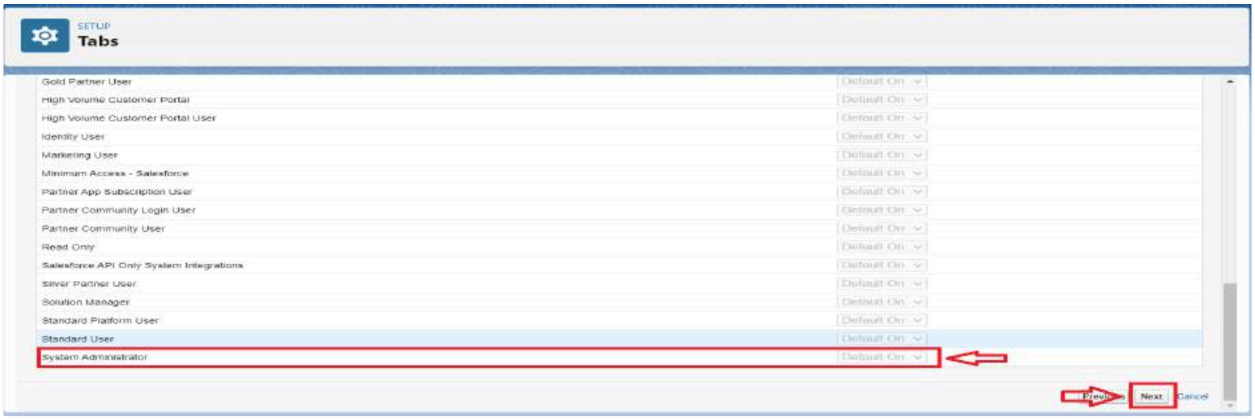
**Step 3 :** Next (Add to profiles page) keep it as default

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

You can refer to the below screenshots for references.






### TAB 2 : Create a Tab for Customers

To create a Tab Customers follow these steps :

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

**Step 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.

### TAB 3 : To create a Tab for Room Bookings

To create a Tab Room Bookings follow these steps :

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

**Step 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.

### TAB 4 : To create a Tab for Payments

To create a Tab for Payments follow these steps :

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

**Step 2 :** Select Object(Payments) > Select the tab style > Next (Add to profiles page) keep it as default > Next (Add to Custom App) keep it as default > Save.

### TAB 5 : To create a Tab for Food Selections

To create a Tab for Food Selections follow these steps :

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

**Step 2 :** Select Object(Food Selections) > Select the tab style > Next (Add to profiles page) keep it as default > Next (Add to Custom App) keep it as default > Save.

### TAB 6 : To create a Tab for Feedbacks

To create a Tab for Feedbacks follow these steps :

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

**Step 2 :**Select Object(Feedbacks) > Select the tab style > Next (Add to profiles page) keep it as default > Next (Add to Custom App) keep it as default > Save.

# TASK 5 : The Lightning App Creation

## To create a lightning app page:

**Step 1 :** Go to setup page > search "app manager" in quick find > select "app manager" > click on New lightning App.

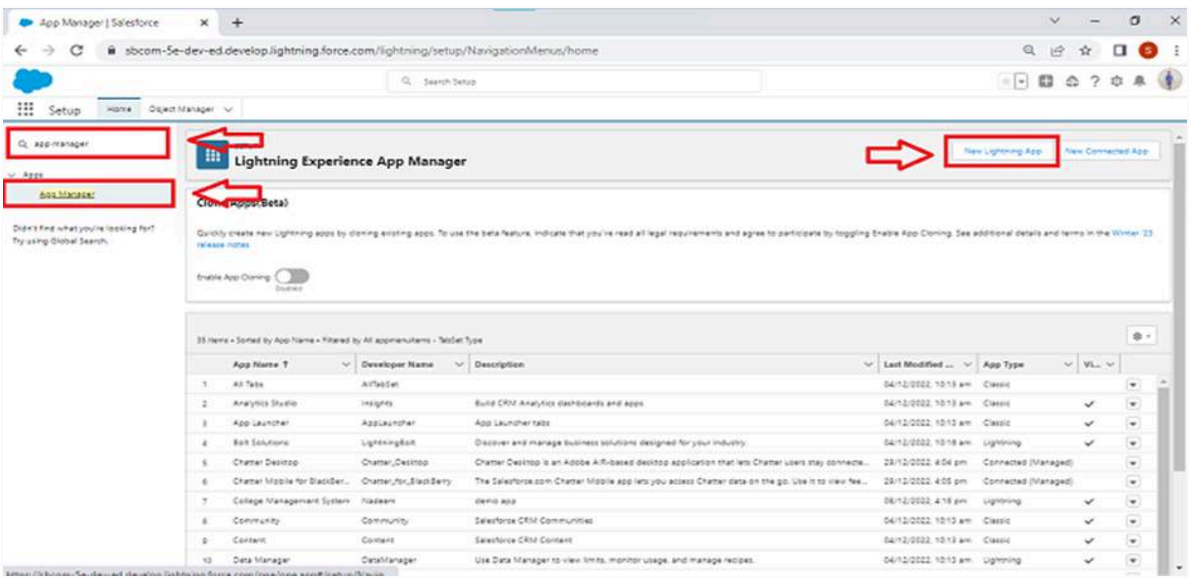
**Step 2 :** Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.

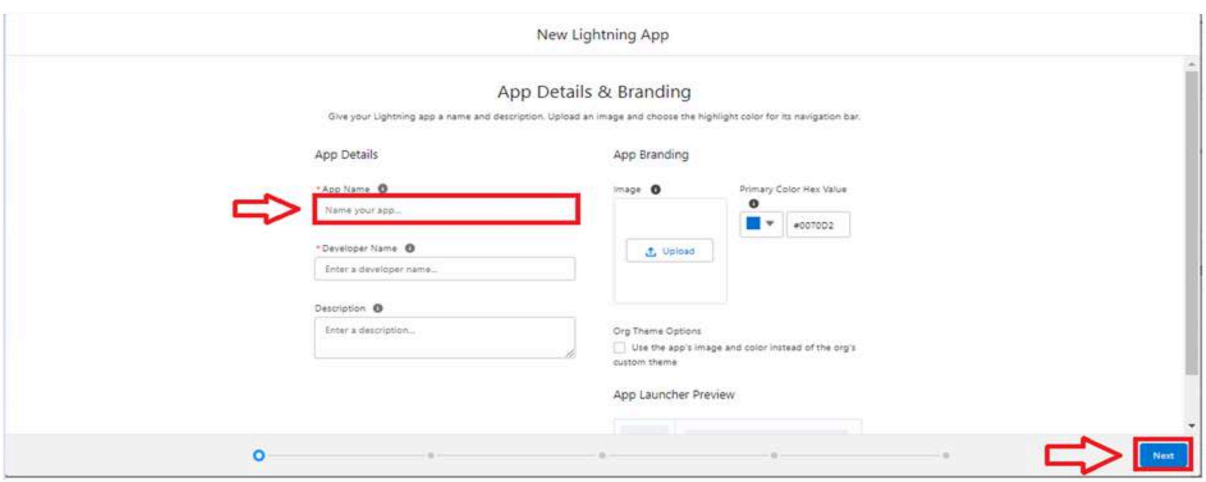
**Step 3 :** To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers1, Room Booking, Payments1, Food selection, Feedbacks, Reports and Dashboards) from the search bar and move it using the arrow button > Next.

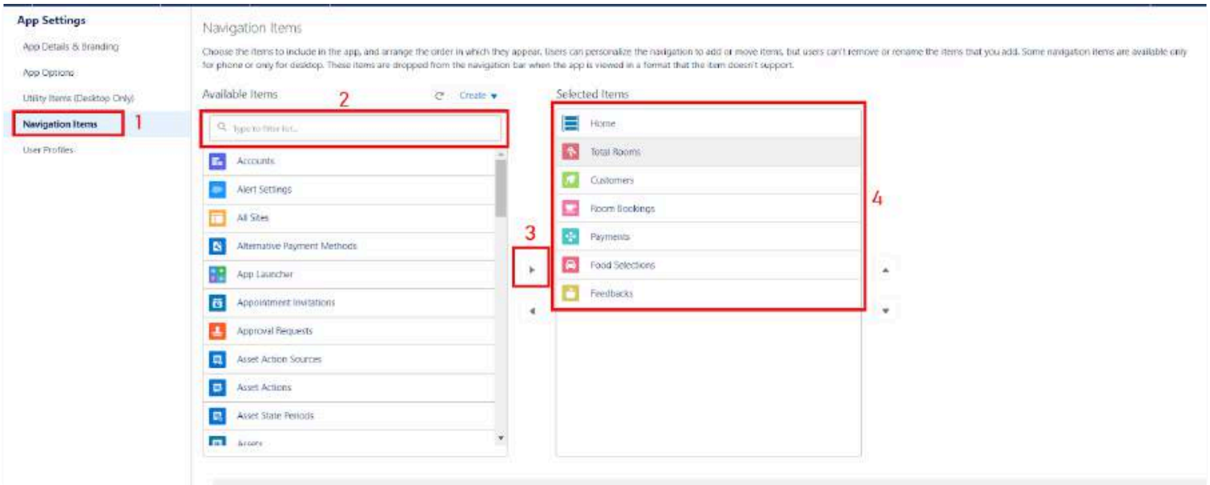
**Step 4 :** To Add User Profiles:

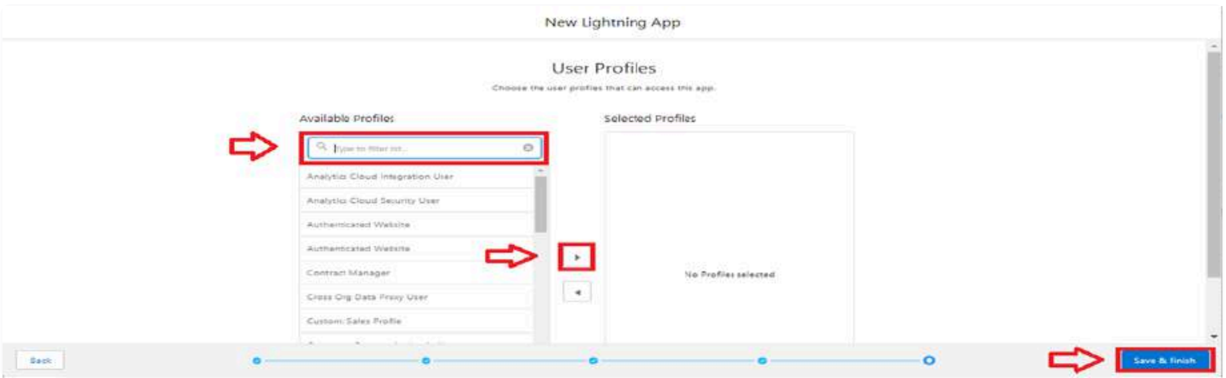
**Step 5 :**Search profiles (System administrator) in the search bar > click on the arrow button > save & finish.

You can refer to the below screenshots for references.






# TASK 6 : Fields & Relationships Creation

## Task 6.1 : Creation of fields for the customer1 object

**1. Field Name** : " Phone No "

Follow the below steps to create field in an object:

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Phone”

**Step 4 :** Click on next

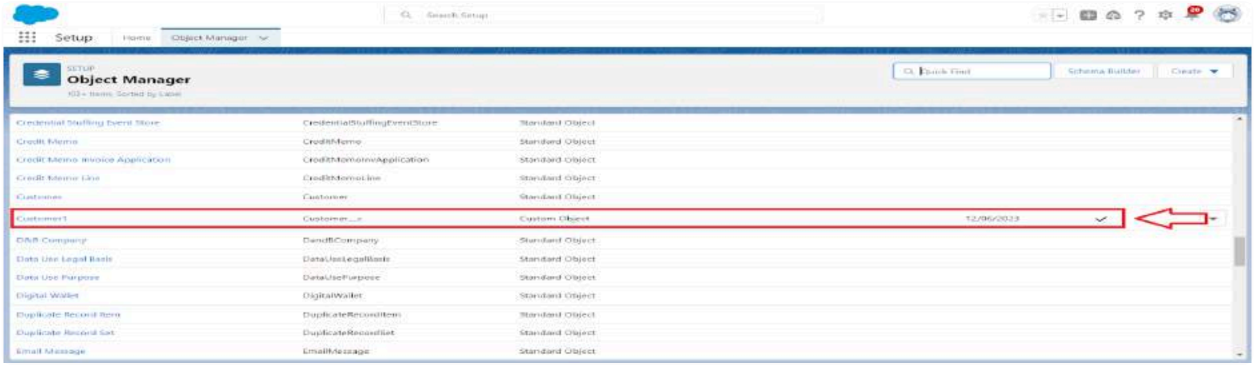
**Step 5 :** Fill the Above as following:

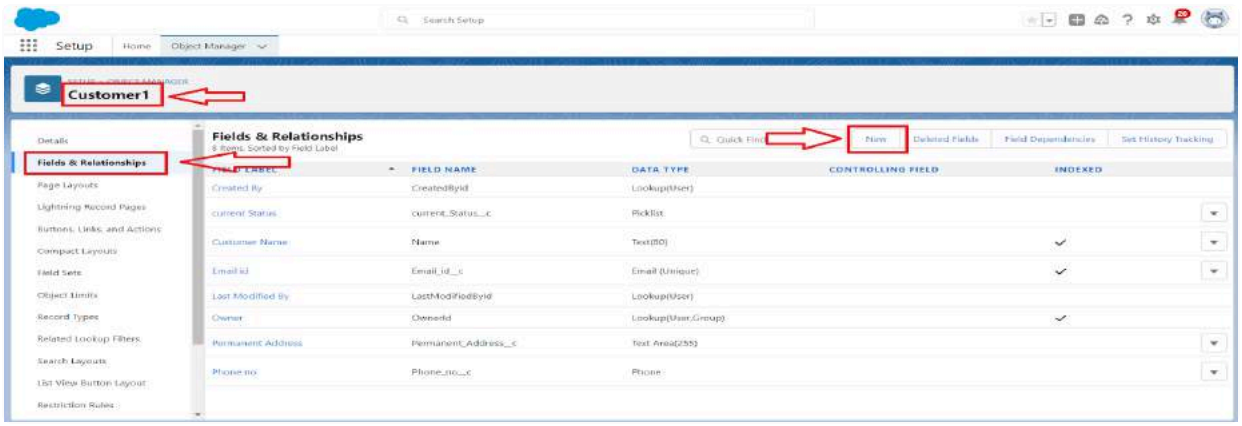
  **5.1 :** Field Label: **Phone no**

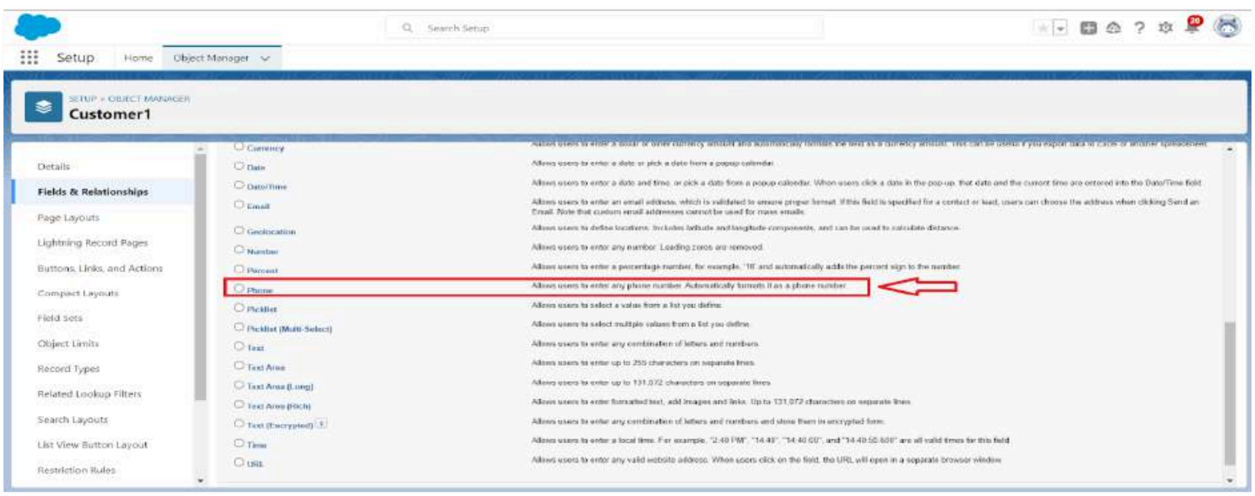
  **5.2 :** Field Name : gets auto generated

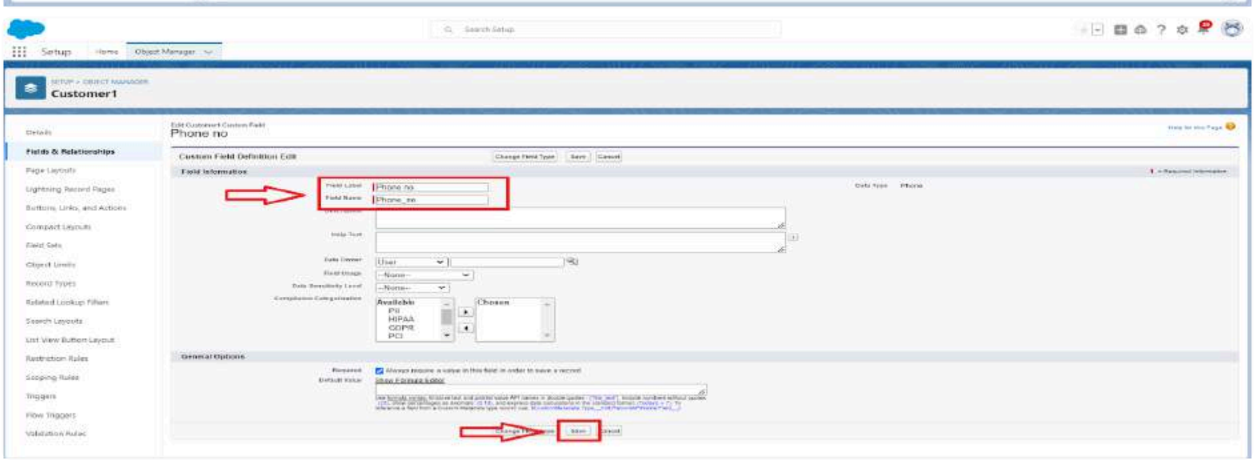
  **5.3 :** Click on Next > Next > Save and new.

You can refer to the below screenshots for references.


Setup
Object Manager
Object Manager
Schema Builder
Create
Customer1
Customer__c
Custom Object



Setup
Home
Object Manager
Customer1
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
current Status
current_Status__c
Picklist
Customer Name
Name
Text(80)
Email id
Email_id__c
Email (Unique)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Permanent Address
Permanent_Address__c
Text Area(255)
Phone no
Phone_no__c
Phone



Setup
Home
Object Manager
Customer1
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
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted)
Time
URL



Setup
Object Manager
Customer1
Phone no
Custom Field Definition Edit
Field Information
Phone no
Phone_no
Data Type
Phone
Available
PII
HIPAA
GDPR
PCI
Chosen
General Options
Save
Cancel

**2. Field Name : "** EMail **"**

Follow the below steps to create field in an object:

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data type as a “Email” and Click on Next

**Step 4 :** Fill the Above as following:

- Field Label: **Email**
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new.

**3. Field Name : "** Permanent Address **"**

**Step 1 :** Follow the below steps to create field in an object:

**Step 2 :** Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.

**Step 3 :** Now click on “Fields & Relationships” ? New

**Step 4 :**Select Data type as a “Text Area” and Click on Next

**Step 5 :** Fill the Above as following:

- Field Label: **Permanent Address**
- Field Name : It’s gets auto generated
- Click on Next > Next > Save and new.

**4. Field Name : "** Current Status **"**

Follow the below steps to create field in an object:

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data type as a “Picklist” and Click on Next

**Step 4 :** Fill the Above as following:

- Field Label: **Current Status**
- Value - Select enter values with each value separated by a new line
    1. Student
    2. Employee
    3. Others
- Select required
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new.

## Task 6.2 : Creation of fields for the Room Booking object

**1. Field Name :** " Room Sharing"

**Step 1 :** Follow the below steps to create field in an object:

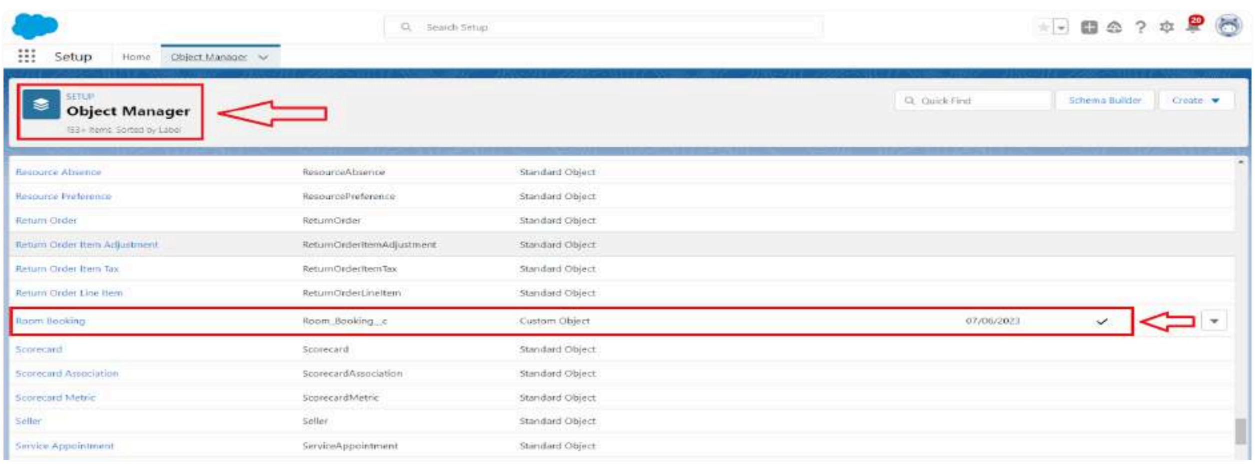
**Step 2 :** Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.

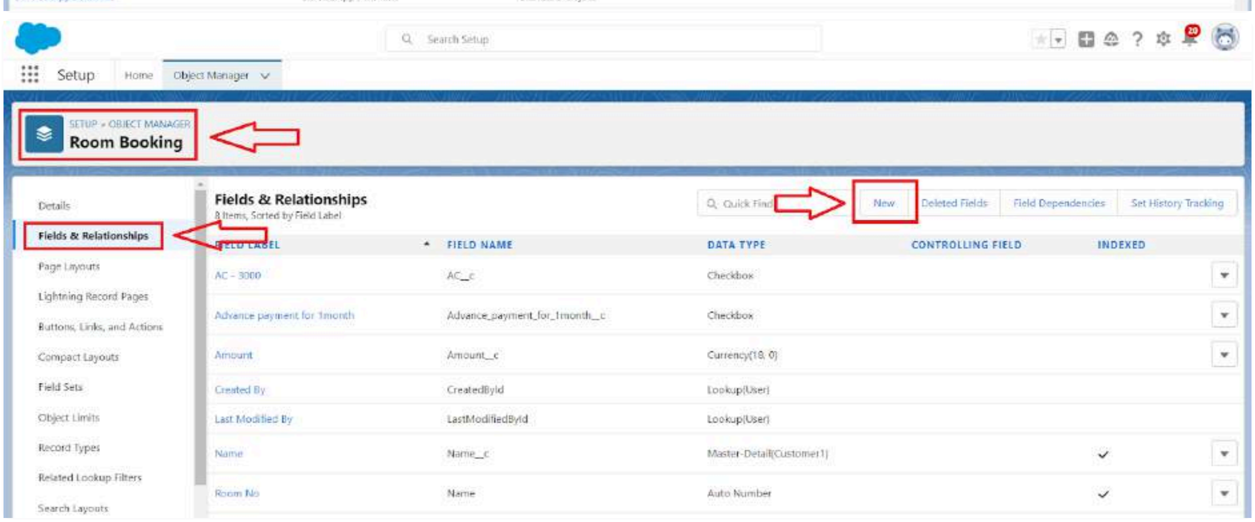
**Step 3 :** Now click on “Fields & Relationships” > New

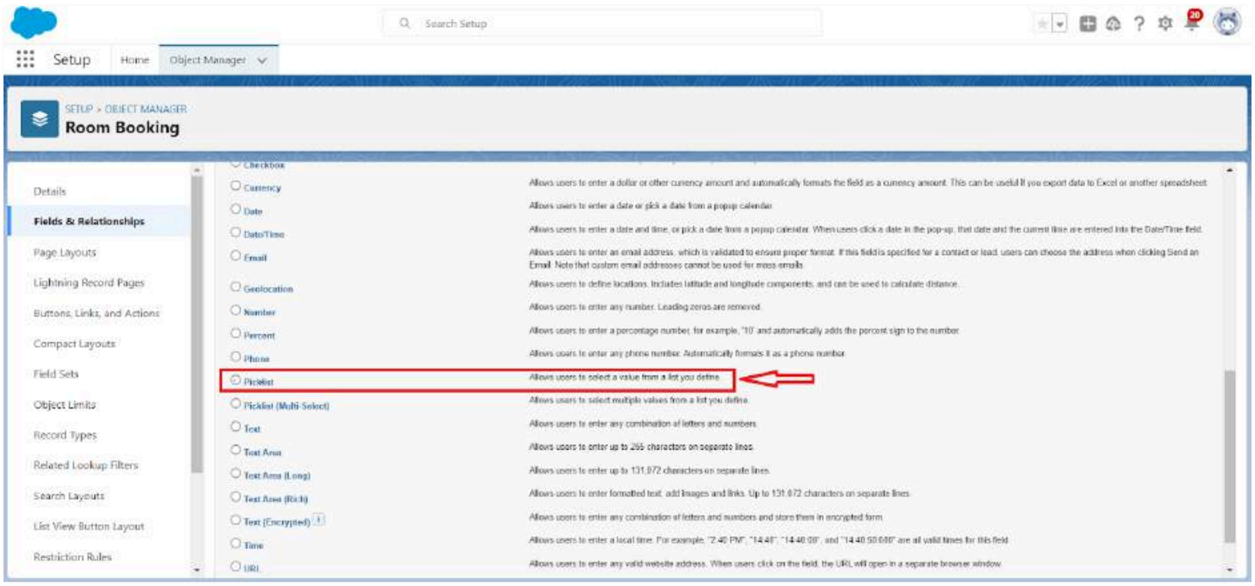
**Step 4 :** Select Data Type as a “Picklist”

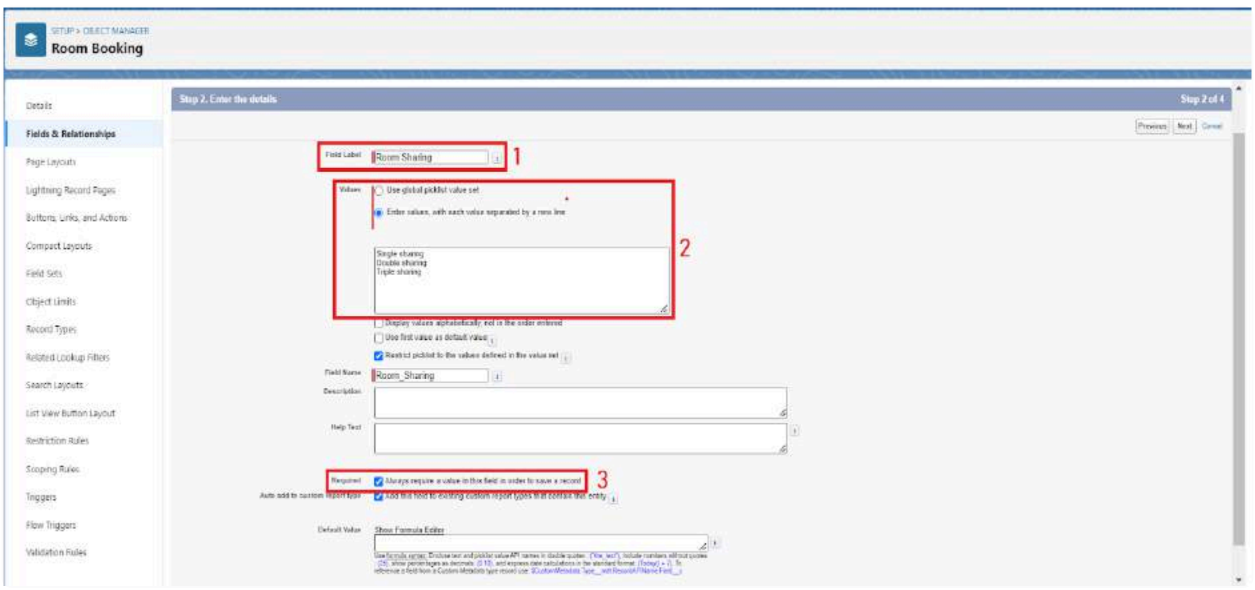
**Step 5 :** Click on NextFill the Above as following:

- 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. Field Name : " Name "

Follow the below steps to create field in an object:

**Step 1 :** To create fields & relationship to an object:

**Step 2 :** Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.

**Step 3 :** Now click on “Fields & Relationships” > New

**Step 4 :** Select Data Type as a “Master-detail Relationship”

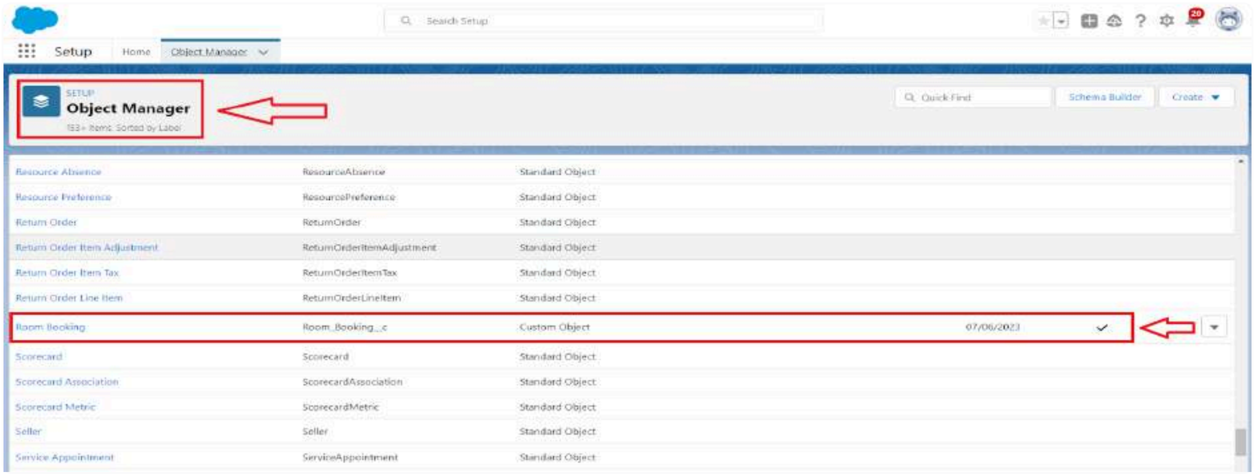
**Step 5 :** Click on Next

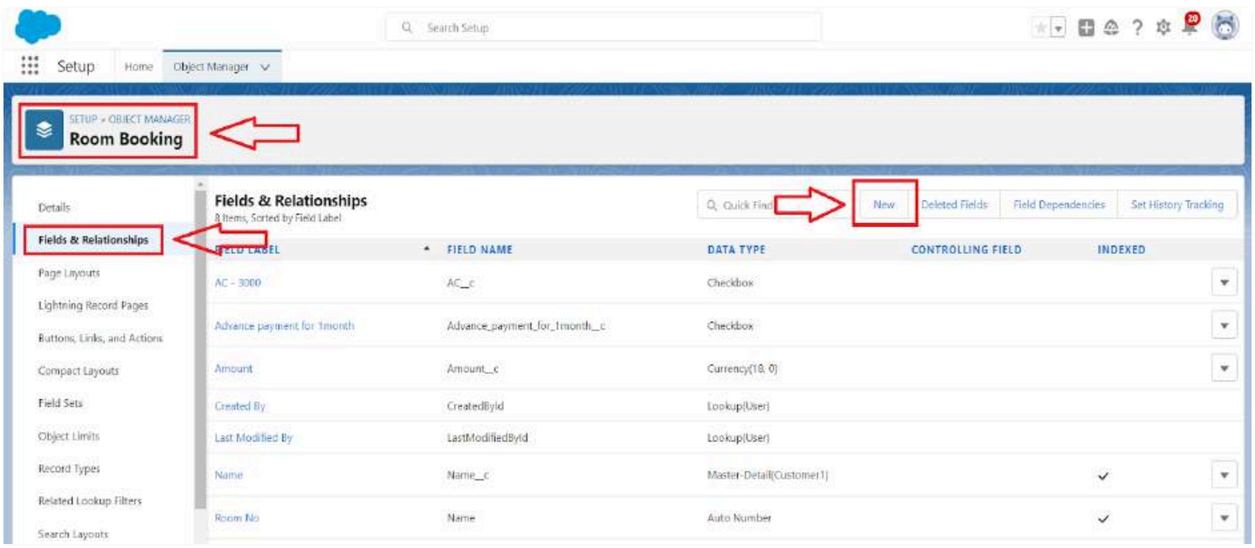
**Step 6 :** Click on the Related to drop down and Select the “Customer1” object and click on Next

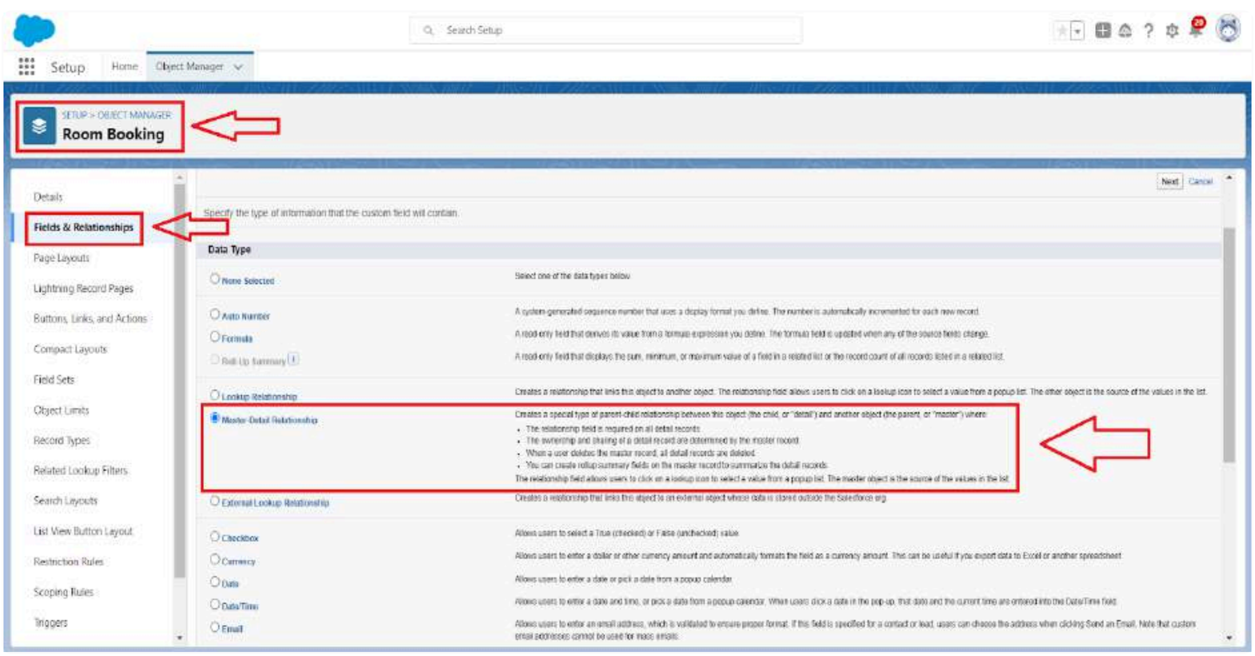
**Step 7 :** Fill the Above as following:

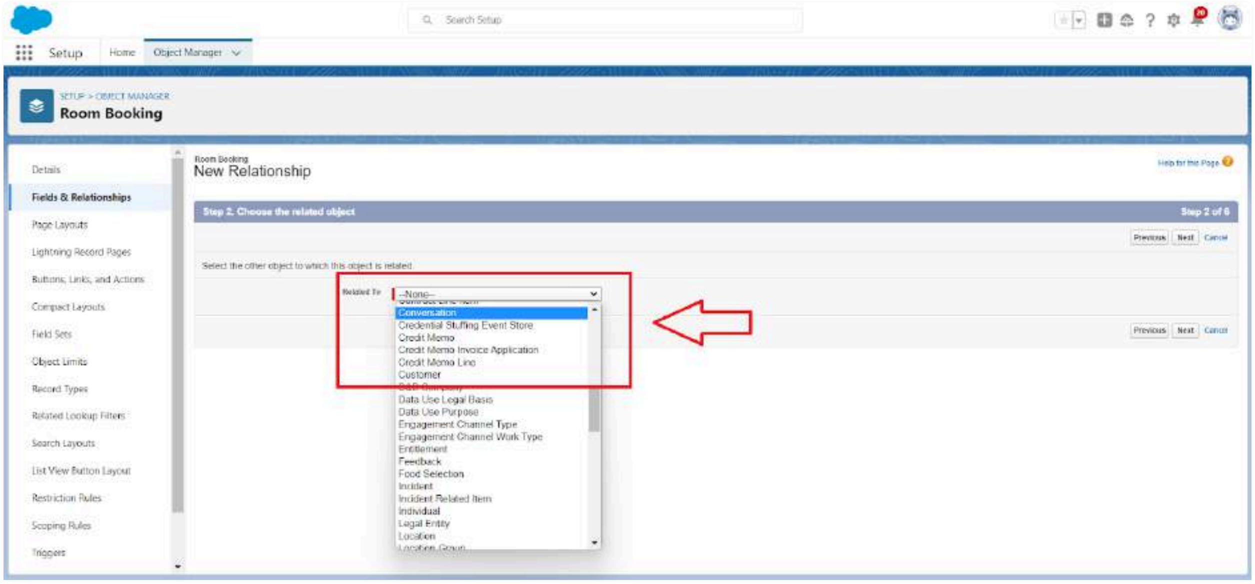
- Change the Field Label: Name
- Field Name : It’s gets auto generated

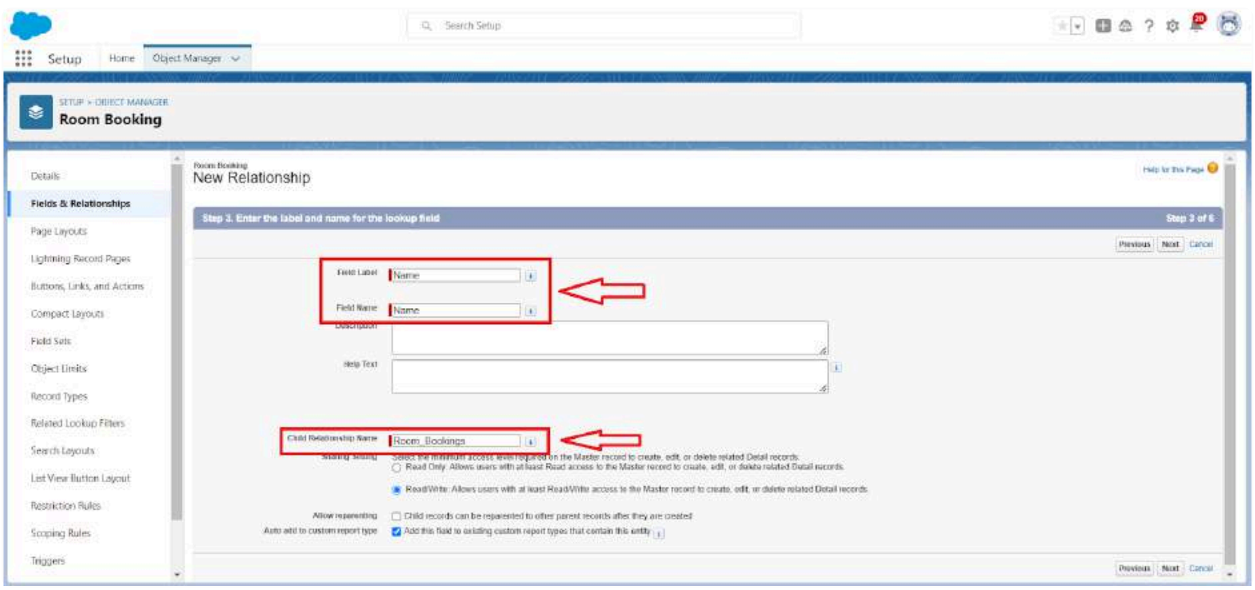
**Step 8 :** Click on Next > Next > Save and new.












### **3. Field Name :** " AC-3000 "

Follow the below steps to create field in an object:

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Checkbox”

**Step 4 :** Click on Next

**Step 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. Field Name : "** Advance Payment for 1 Month **"**

Follow the below steps o create field in an object:

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

**Step 2 :** Now click on "Fields & Relationships" > New

**Step 3 :** Select Data Type as a "Checkbox"

**Step 4 :** Click on Next

**Step 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. Field Name : "** Amount **"**

Follow the below steps to create field in an object:

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

**Step 2 :** Now click on "Fields & Relationships" ? New

**Step 3 :** Select Data Type as a "Currency"

**Step 4 :** Click on Next

**Step 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. Field Name : "** Total No Of Rooms **"**

Follow the below steps to create field in an object:

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

**Step 2 :** Now click on "Fields & Relationships" ? New

**Step 3 :** Select Data Type as a "Master-detail Relationship"

**Step 4 :** Click on Next

**Step 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. RollUp Summary Field Name in Total Room Object : " Rooms Booked "

You should create this field in Total Room Object.
Follow the below steps to create field in an object:

**Step 1 :** After Creating the Master- Detail Relationship Than Only you can create the Rollup Summary

**Step 2 :** Go to setup > click on Object Manager > type object name(Total Rooms) in the search bar > click on the object.

**Step 3 :** Now click on “Fields & Relationships” ? New

**Step 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

**Step 5 :** Select the Room Bookings in the Summarized Object

**Step 6 :** Select the count Radio button in the select Roll-up Type

**Step 7 :** Click on Next > Next > Save and new


## 8. Field Name : " Rooms Available "

Follow the below steps to create field in an object:

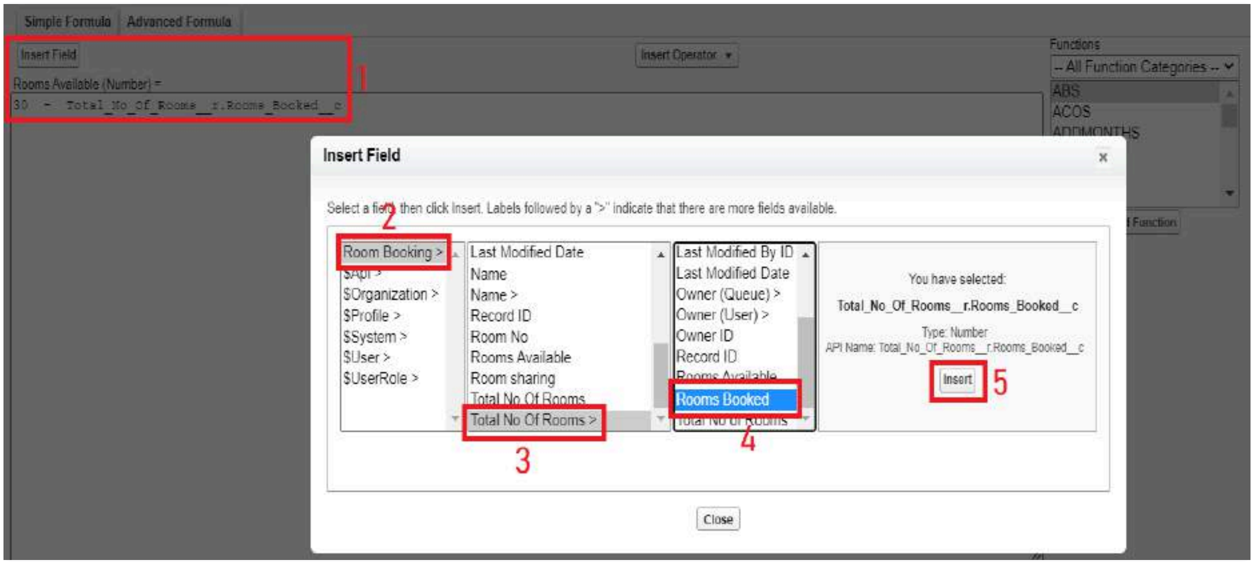
**Step 1 :** Go to setup > click on Object Manager > type object name(Rooms Booking) in the search bar > click on the object.

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data type as a “Formula” and Click on Next

**Step 4 :** Fill the Above as following:

- Field Label: Rooms Available
- Field Name : It’s gets auto generated
- Select the Formula Return Type as “Number”and 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. Field Name :** **"** Check in **"**

Follow the below steps to create field in an object:

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Checkbox”

**Step 4 :** Click on Next

**Step 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. Field Name :** " Check Out "

Follow the below steps to create field in an object:

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

**Step 2 :** Now click on “Fields & Relationships” ? New

**Step 3 :** Select Data Type as a “Checkbox”

**Step 4 :** Click on Next

**Step 5 :** Fill the Above as following:

- Field Label: Check Out
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new

## Task 6.3 : Creation of Fields & Relationship for Payment1 Object

**1 . Field Name :** " Name "

Follow the below steps to create field in an object:

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

**Step 2 :** Now click on “Fields & Relationships” > New

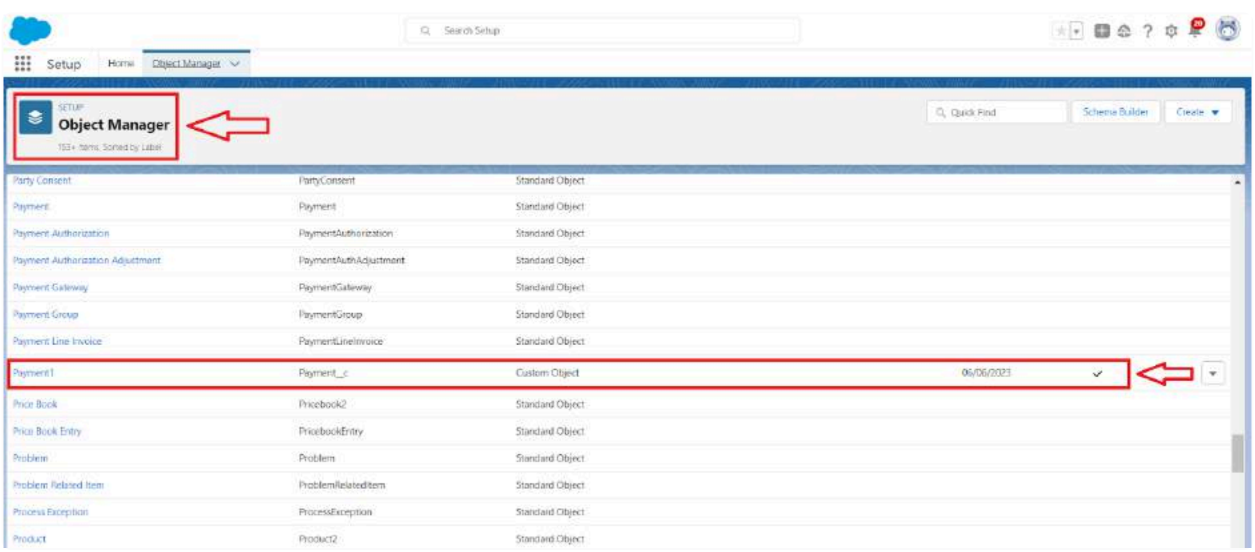
**Step 3 :** Select Data Type as a “Master-detail Relationship”

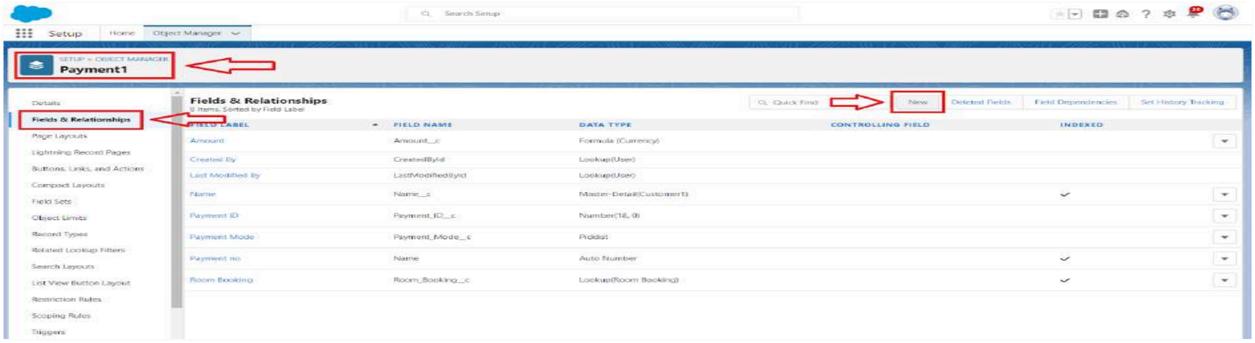
**Step 4 :** Click on Next

**Step 5 :** Click on the Related to drop down and Select the Customer1 object and click on Next

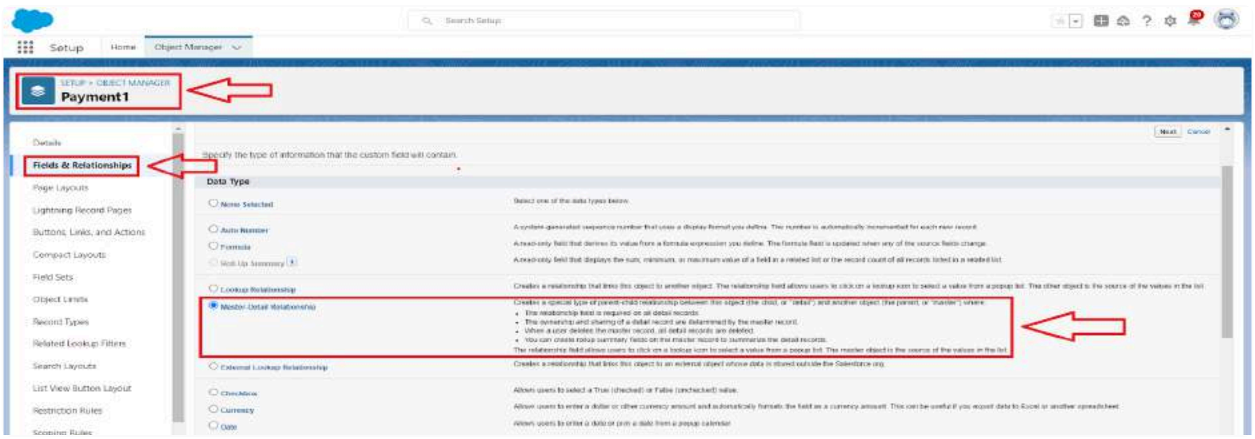
**Step 6 :** Fill the Above as following:

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

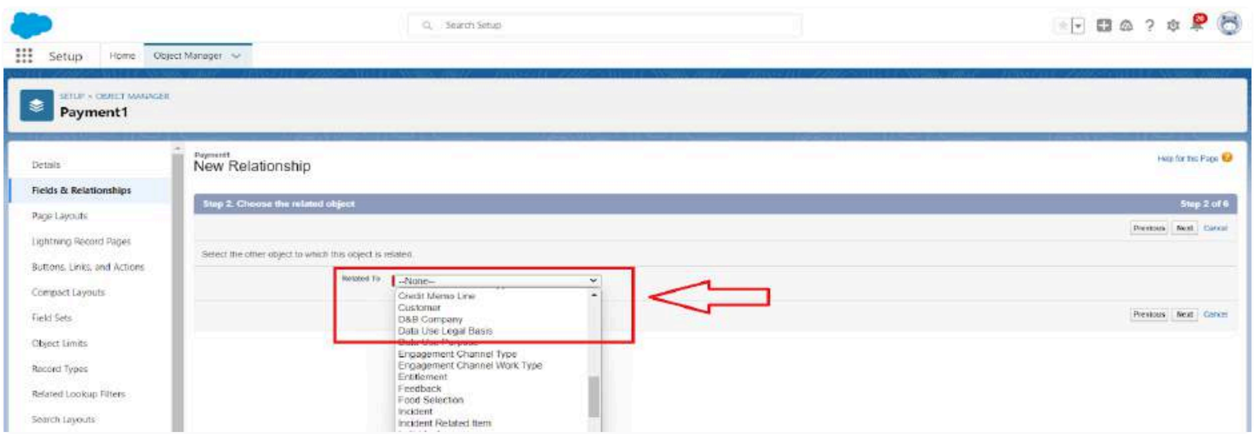




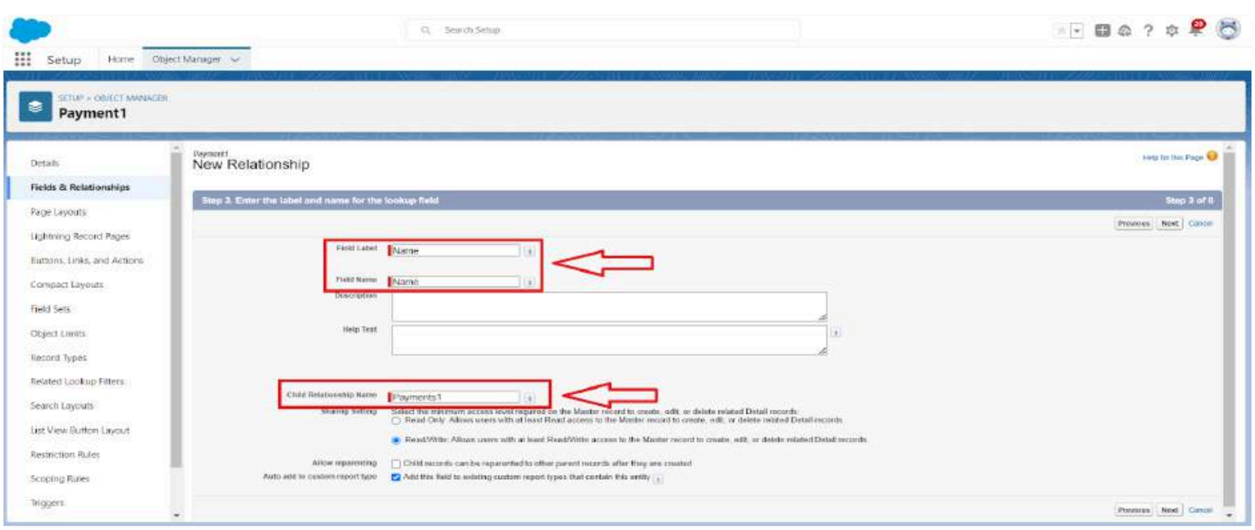
Setup
Home
Object Manager
Payment1
Details
Fields & Relationships
Fields & Relationships
New

Setup
Home
Object Manager
Payment1
Fields & Relationships
Data Type

Setup
Home
Object Manager
Payment1
Details
Fields & Relationships
New Relationship
Step 2. Choose the related object
Step 2 of 6
--None--
Credit Memo Line
Customer
D&B Company
Data Use Legal Basis
Engagement Channel Type
Engagement Channel Work Type
Entitlement
Feedback
Food Selection
Incident
Incident Related Item

Setup
Home
Object Manager
Payment1
Details
Fields & Relationships
New Relationship
Name
Name
Payments1

## 2 . Field Name : " Room Booking "

Follow the below steps to create field in an object:

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

**Step 2 :** Now click on “Fields & Relationships” > New

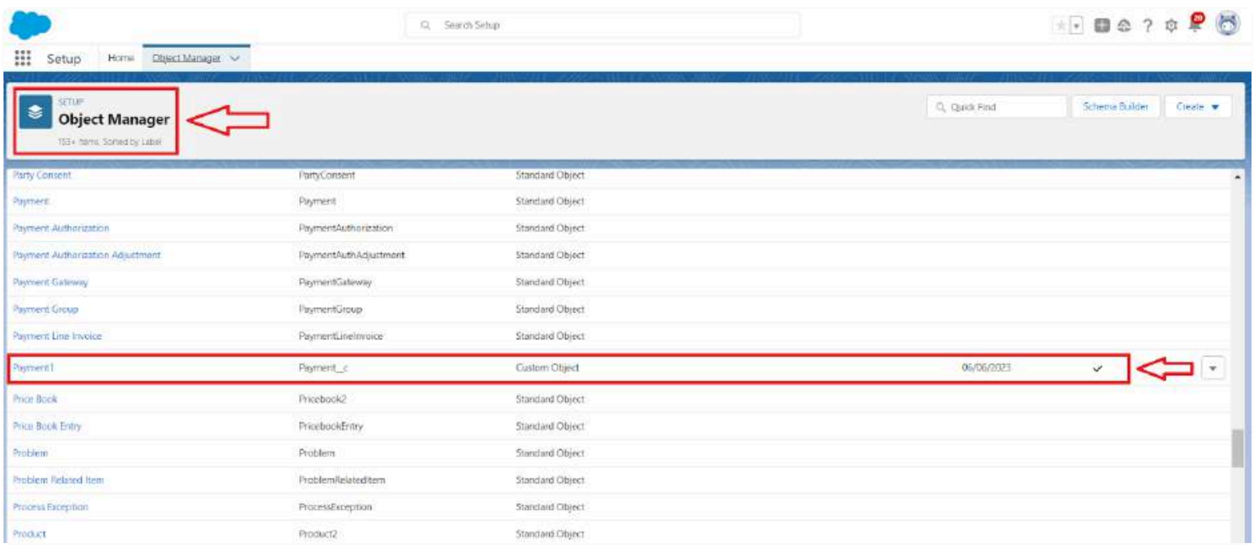
**Step 3 :** Select Data Type as a “Lookup Relationship”

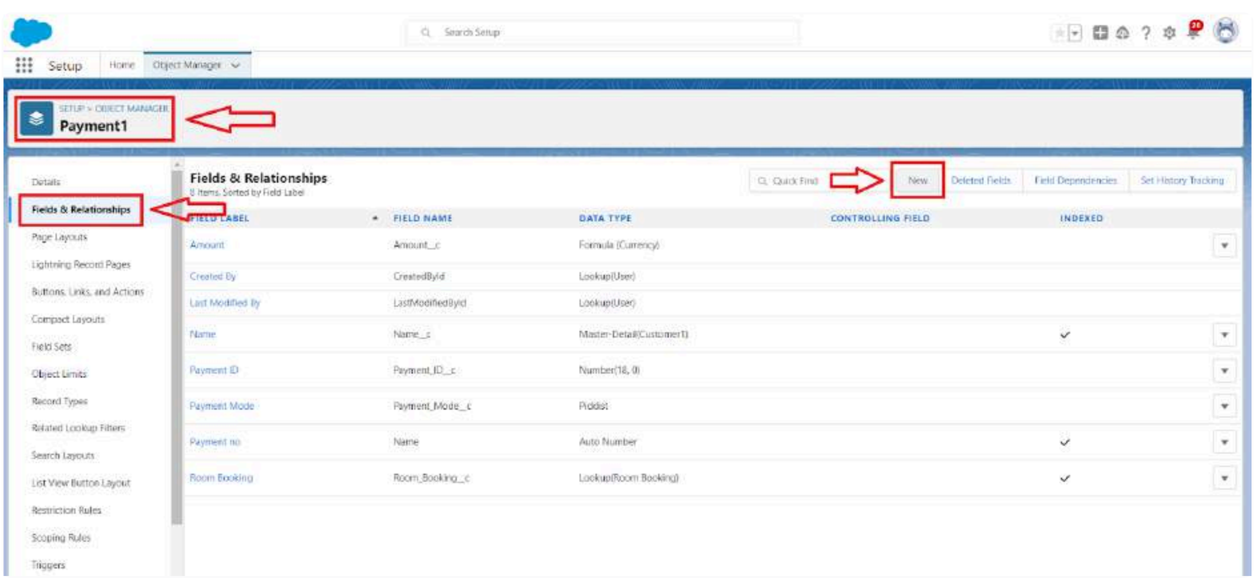
**Step 4 :** Click on Next

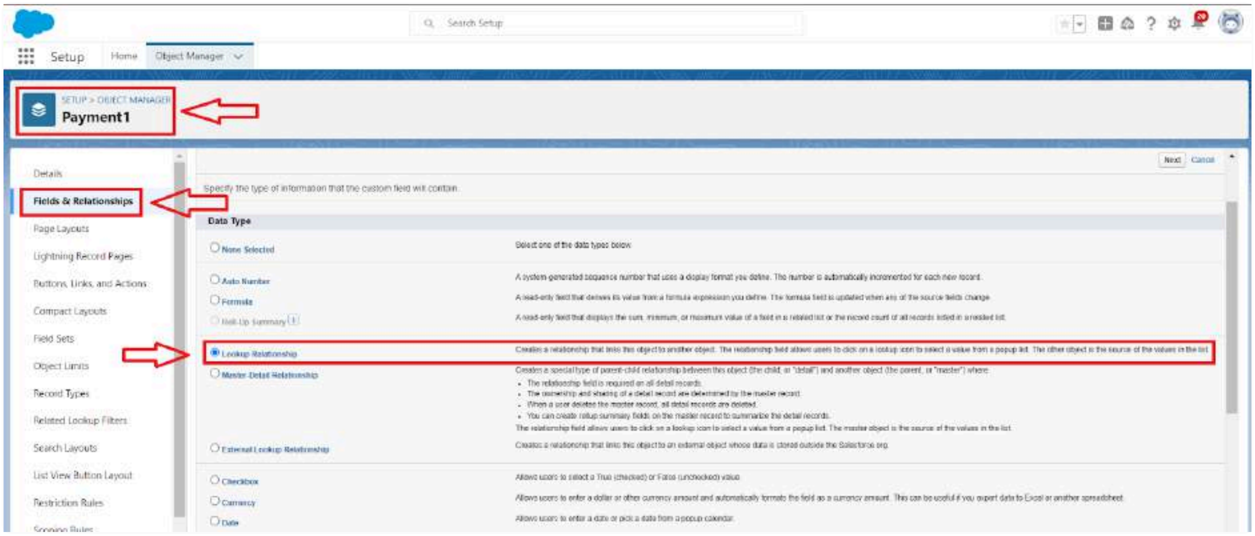
**Step 5 :** Click on the Related to drop down and Select the Room Booking object and click on Next

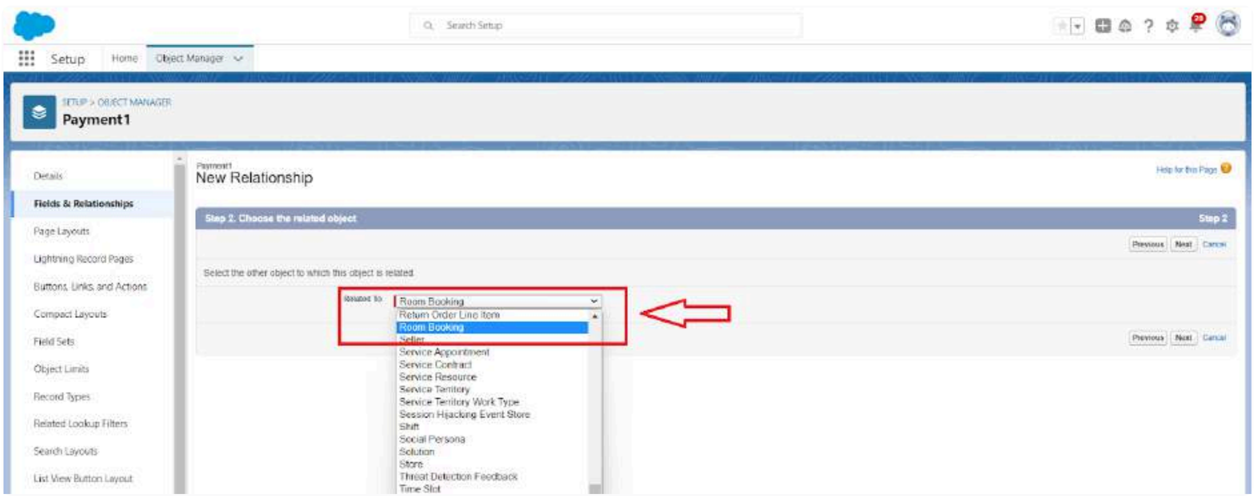
**Step 5 :** Fill the Above as following:

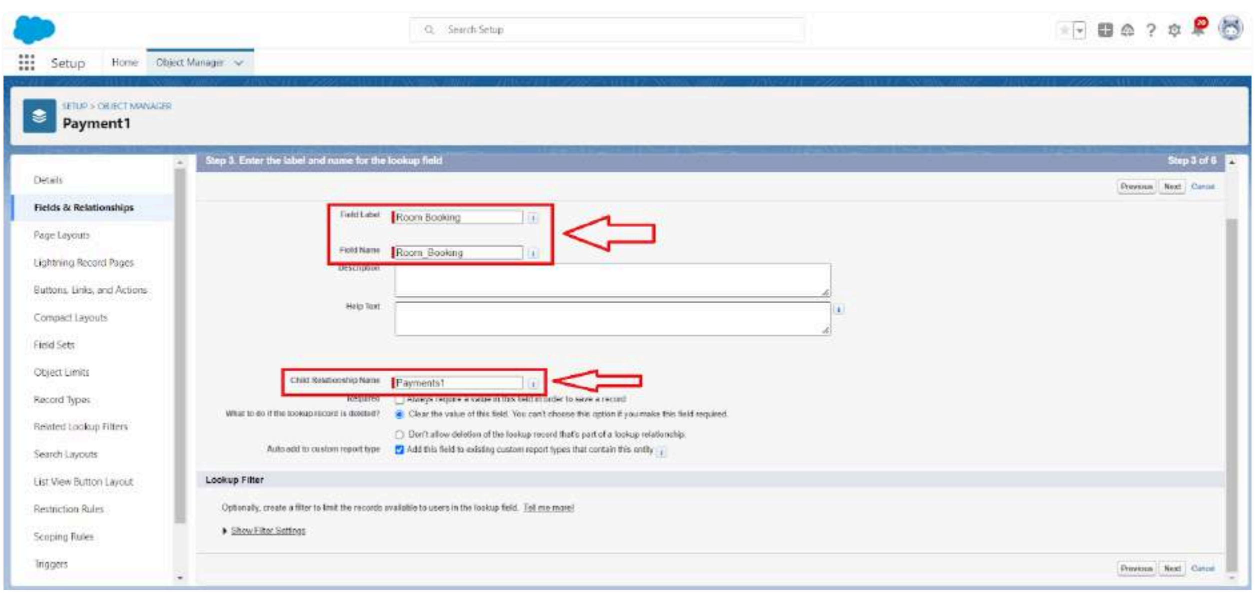
- Change the Field Label: Room Booking
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new.









## 3 . Field Name : " Payment Mode "

Follow the below steps to create field in an object:

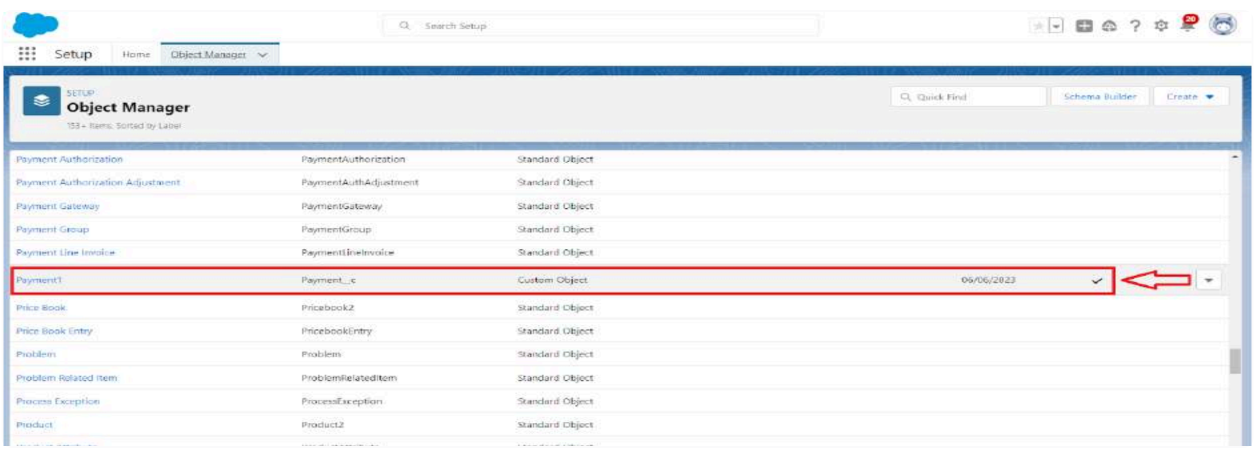
**Step 1 :** Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.

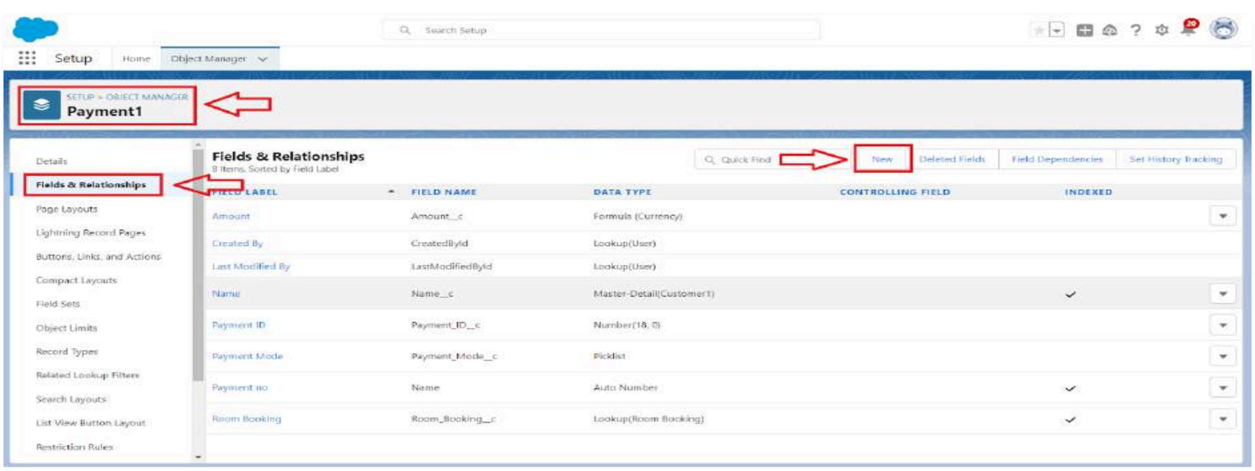
**Step 2 :** Now click on “Fields & Relationships” > New

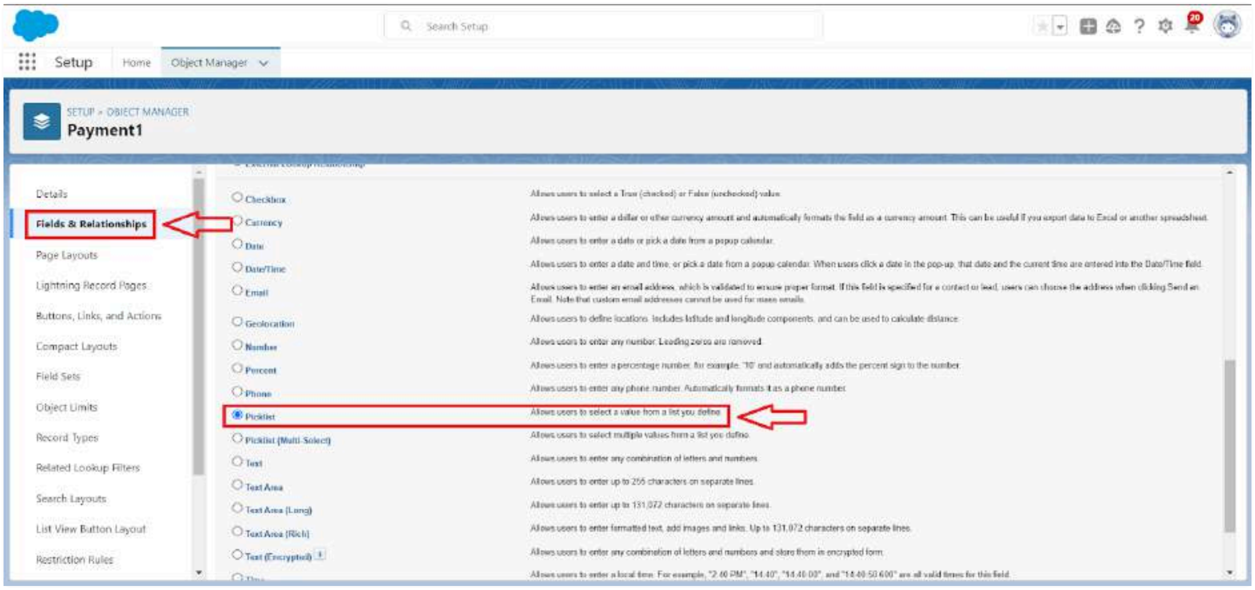
**Step 3 :** Select Data Type as a “Picklist”

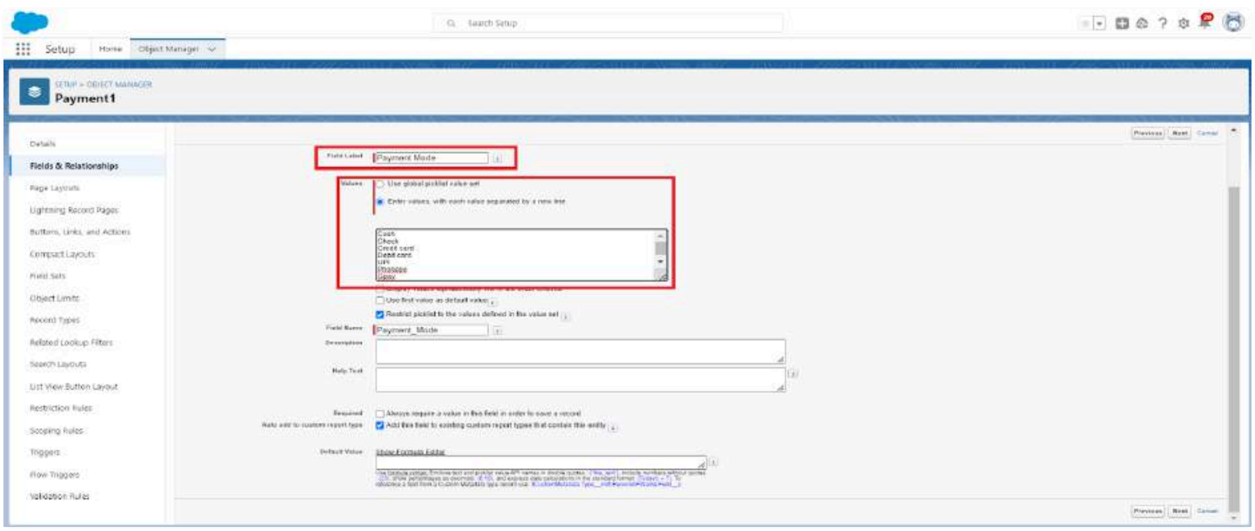
**Step 4 :** Fill the Above as following:

- 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.






## 4 . " Formula "

Follow the below steps to create formula in an object:

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Formula”

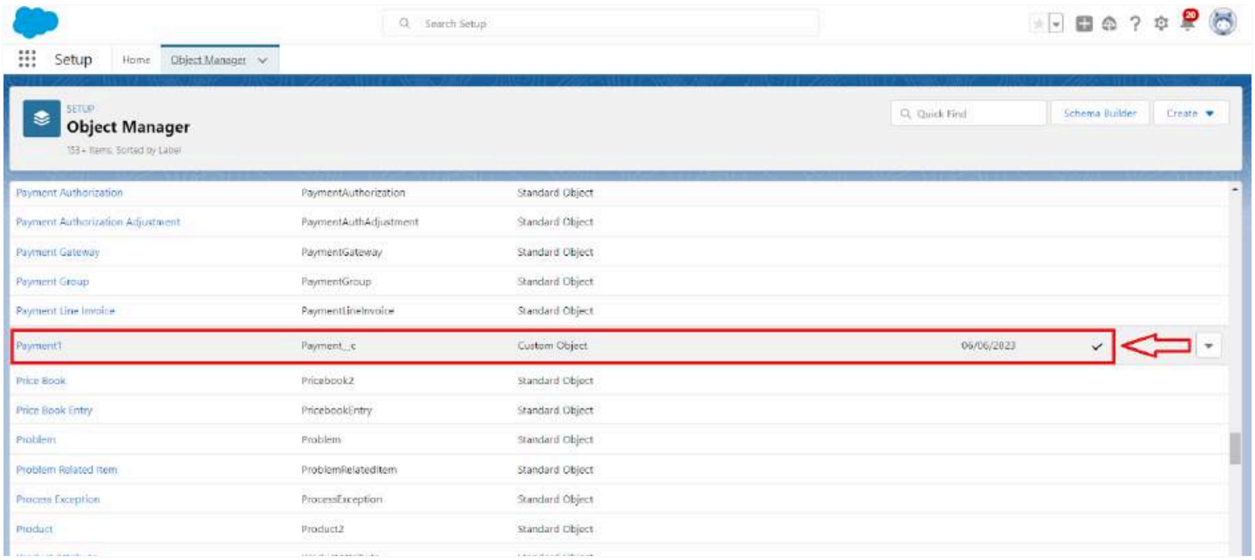
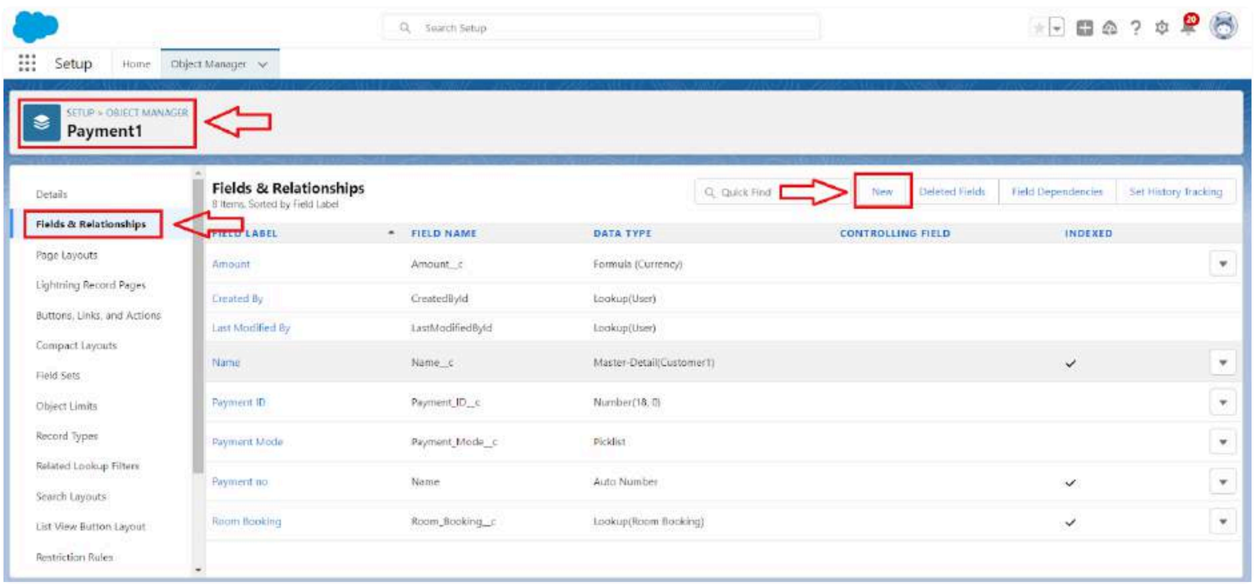
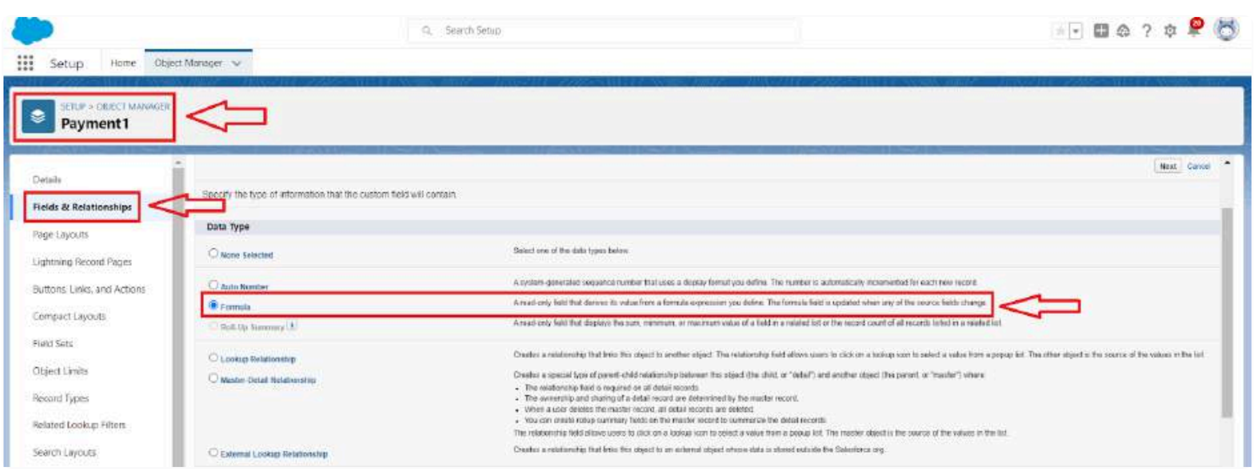
**Step 4 :** Click on Next

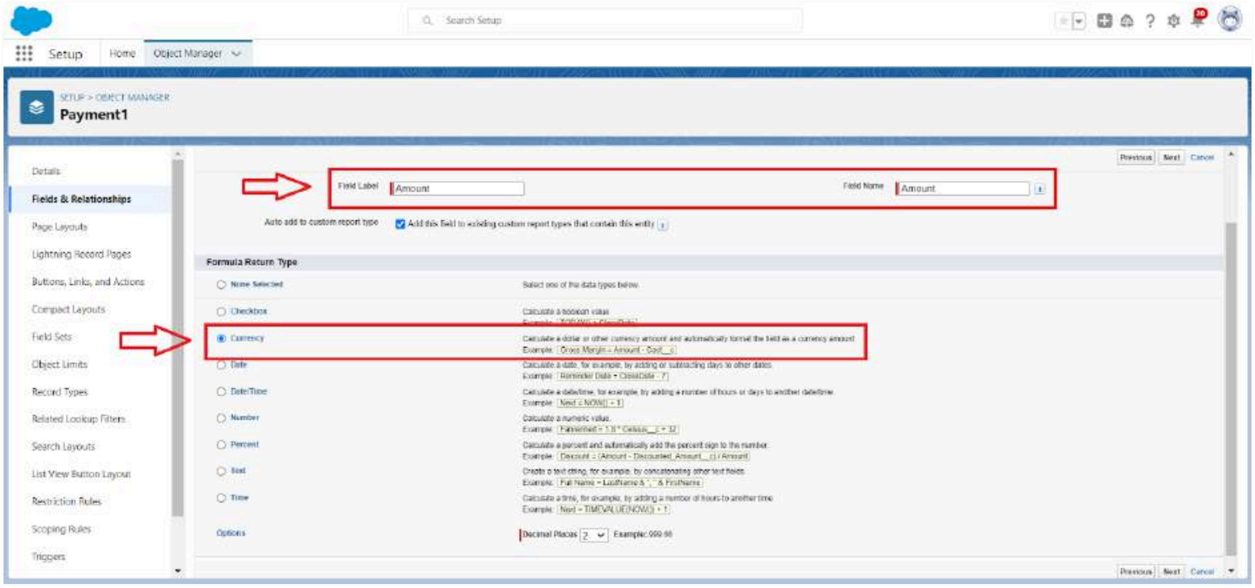
**Step 5 :** Enter the Field label: Amount and Field name: gets auto generated and click on Next

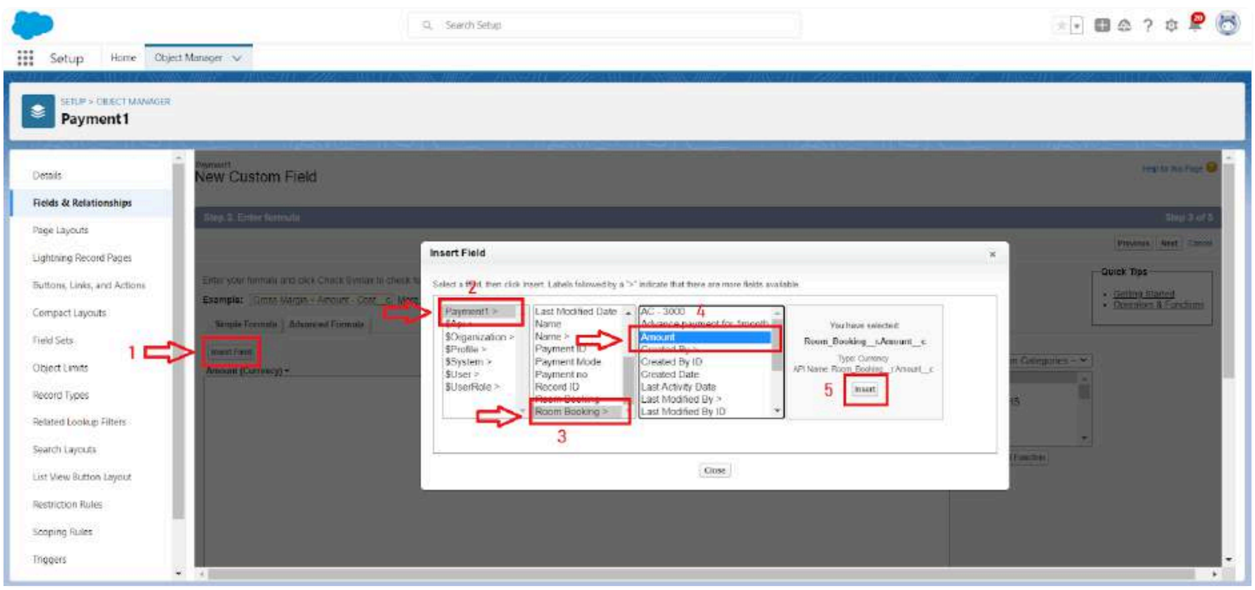
**Step 6 :** In the Advanced Formula Click on the Insert field in the popup Screen Select the Payment1 and in the second drop down select the Room Booking and in the three drop down select the Amount field and click on Insert “ Room_Booking__r.Amount__c ”.

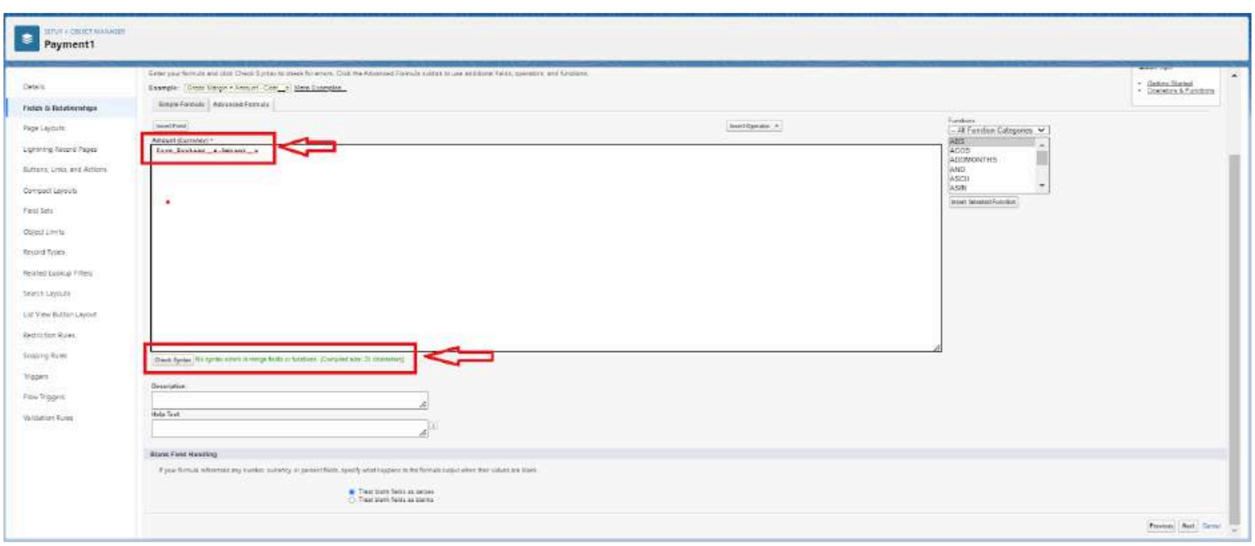
**Step 7 :** Click on the Check syntax: No syntax errors in merge fields

**Step 8 :** Click on Next > Next > Save and new.


Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
Quick Find
Schema Builder
Create
Payment Authorization
PaymentAuthorization
Standard Object
Payment Authorization Adjustment
PaymentAuthAdjustment
Standard Object
Payment Gateway
PaymentGateway
Standard Object
Payment Group
PaymentGroup
Standard Object
Payment Line Invoice
PaymentLineInvoice
Standard Object
Payment1
Payment__c
Custom Object
06/06/2023
Price Book
Pricebook2
Standard Object
Price Book Entry
PricebookEntry
Standard Object
Problem
Problem
Standard Object
Problem Related Item
ProblemRelatedItem
Standard Object
Process Exception
ProcessException
Standard Object
Product
Product2
Standard Object

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Payment1
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
8 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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)

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Payment1
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
Next
Cancel
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







# Task 6.4 Creation of fields for the Food Selection object

**1 . Field Name :** " Payment Mode "

Follow the below steps to create field in an object:

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

**Step 2 :**Now click on “Fields & Relationships” > New

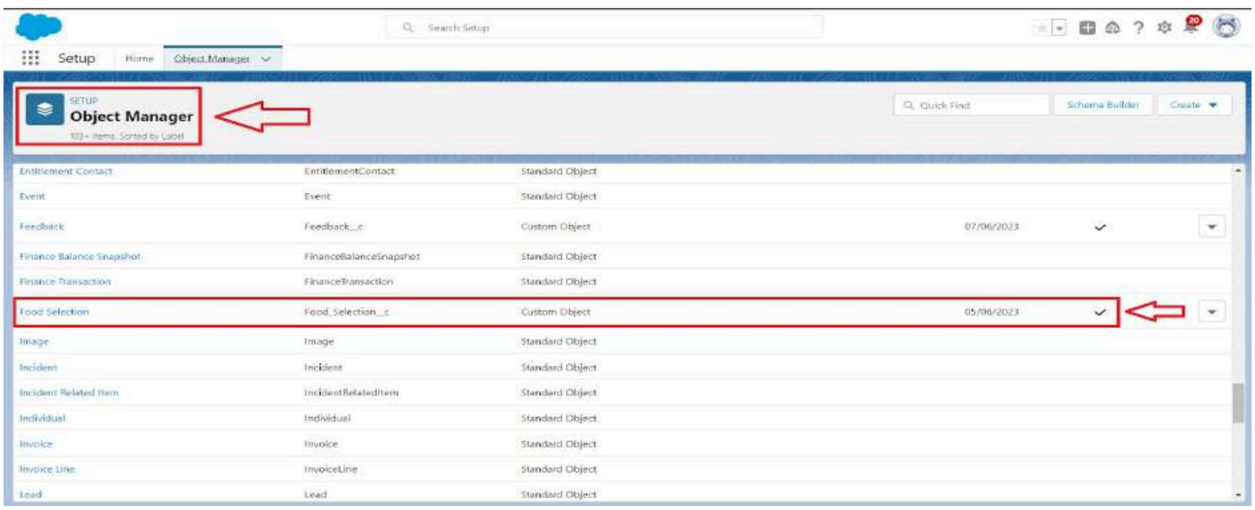
**Step 3 :**Select Data Type as a “Master-detail Relationship”

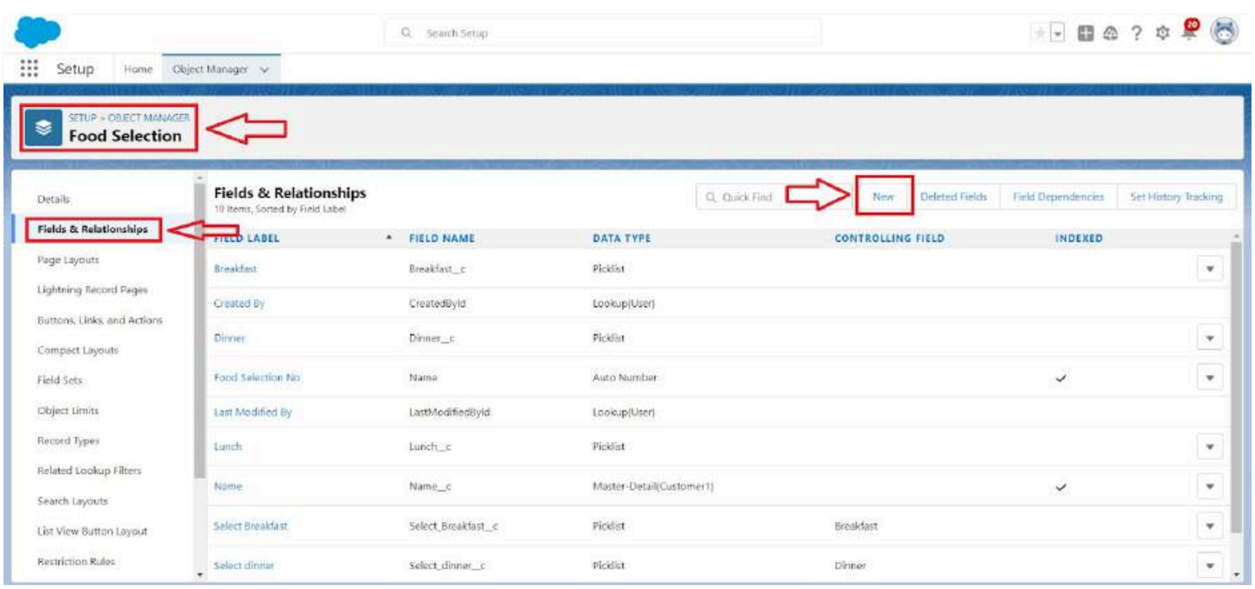
**Step 4 :**Click on Next

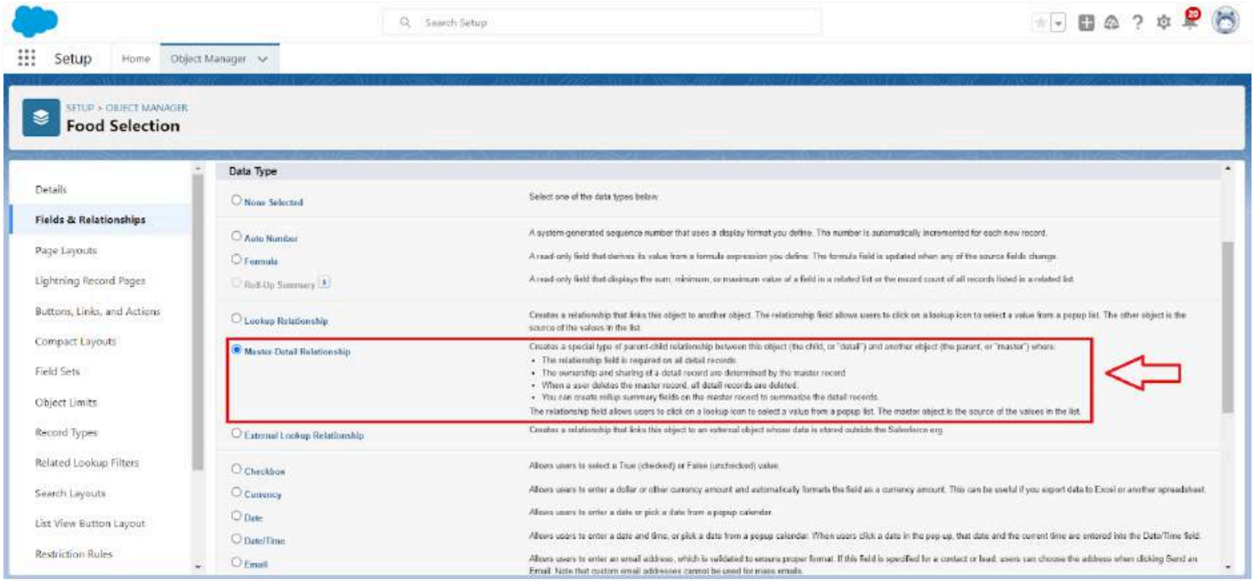
**Step 5 :**Click on the Related to drop down and Select the Customer1 object and click on Next

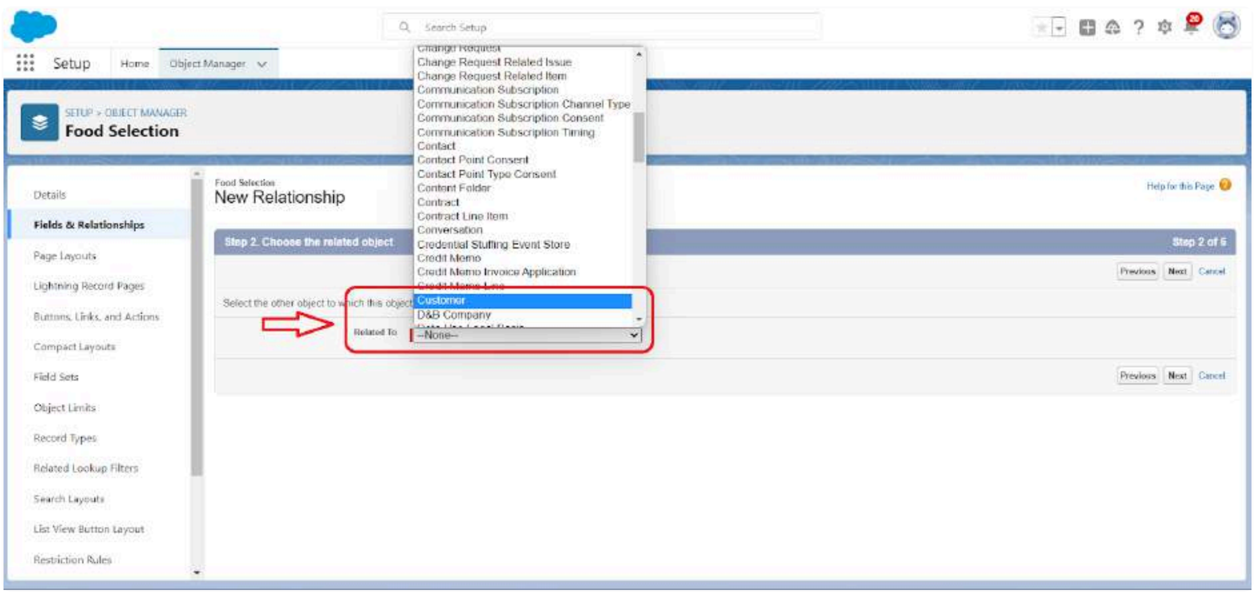
**Step 6 :**Fill the Above as following:

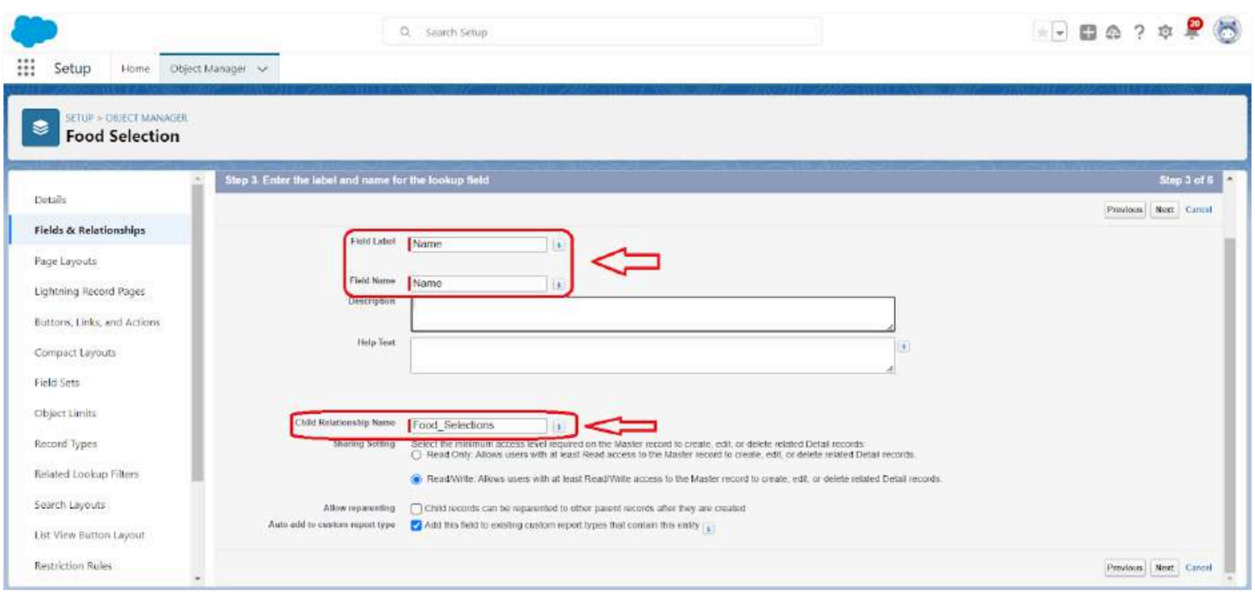
- Change the Field Label: Name
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new.




Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Food Selection
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Data Type
None Selected
Select one of the data types below
Auto Number
Formula
Roll-Up Summary
Lookup Relationship
Master-Detail Relationship
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Food Selection
Food Selection
New Relationship
Step 2. Choose the related object
Step 2 of 6
Help for this Page
Change Request Related Issue
Change Request Related Item
Communication Subscription
Communication Subscription Channel Type
Communication Subscription Consent
Communication Subscription Timing
Contact
Contact Point Consent
Contact Point Type Consent
Content Folder
Contract
Contract Line Item
Conversation
Credential Stuffing Event Store
Credit Memo
Credit Memo Invoice Application
Customer
D&B Company
Select the other object to which this object
Related To
--None--
Previous
Next
Cancel
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


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Food Selection
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
Name
Field Name
Name
Description
Help Text
Child Relationship Name
Food_Selections
Sharing Setting
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
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

## * Creating a global picklist value set:

**Step 1 :** First click on gear icon and click on setup

**Step 2 :** Click on home tab in the Quick find box search for the “ Picklist value sets ”

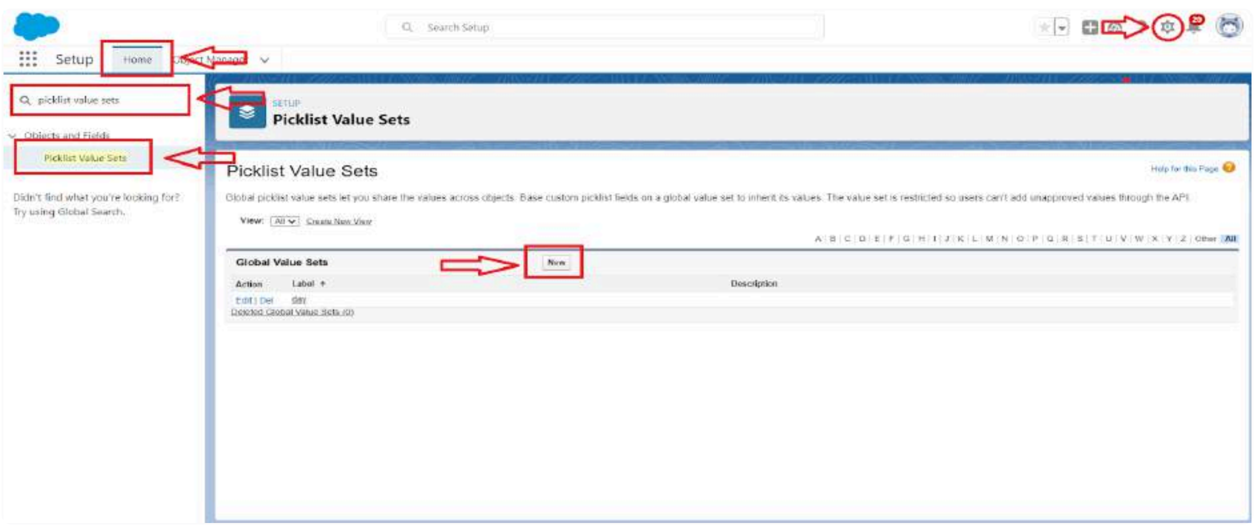
**Step 3 :** Click on the Picklist value set and click on new

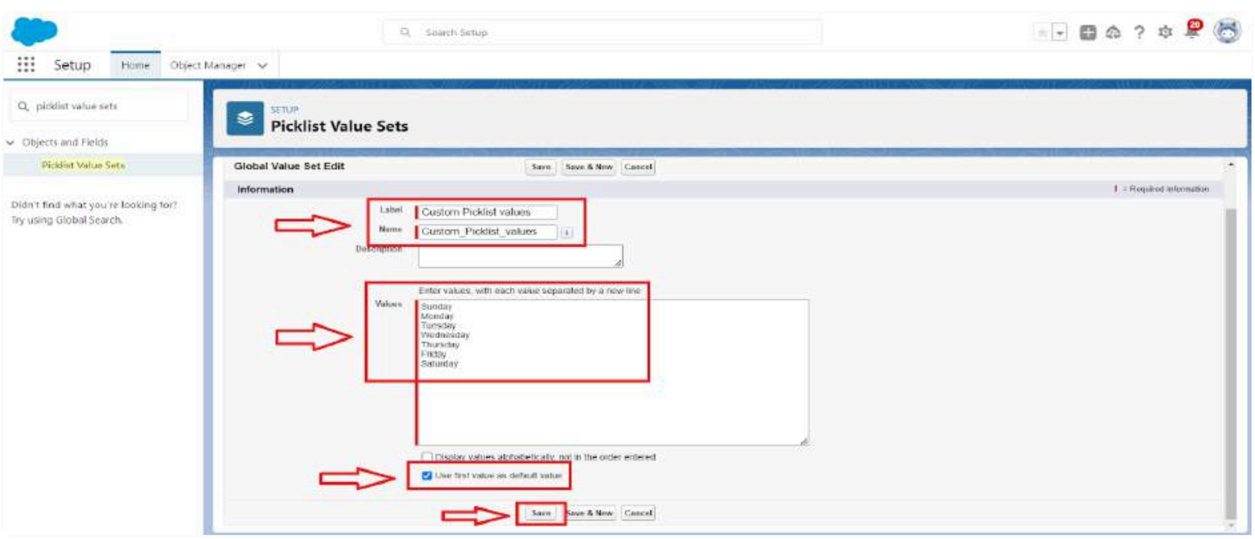
**Step 4 :** Enter the Label name and API name automatically Generate

**Step 5 :** Enter the values with each value separated by a new line

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

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



## 2 . Field Name : " Breakfast "

Follow the below steps create a picklist Field for Food selection object

**Step 1 :** To create fields in an object:

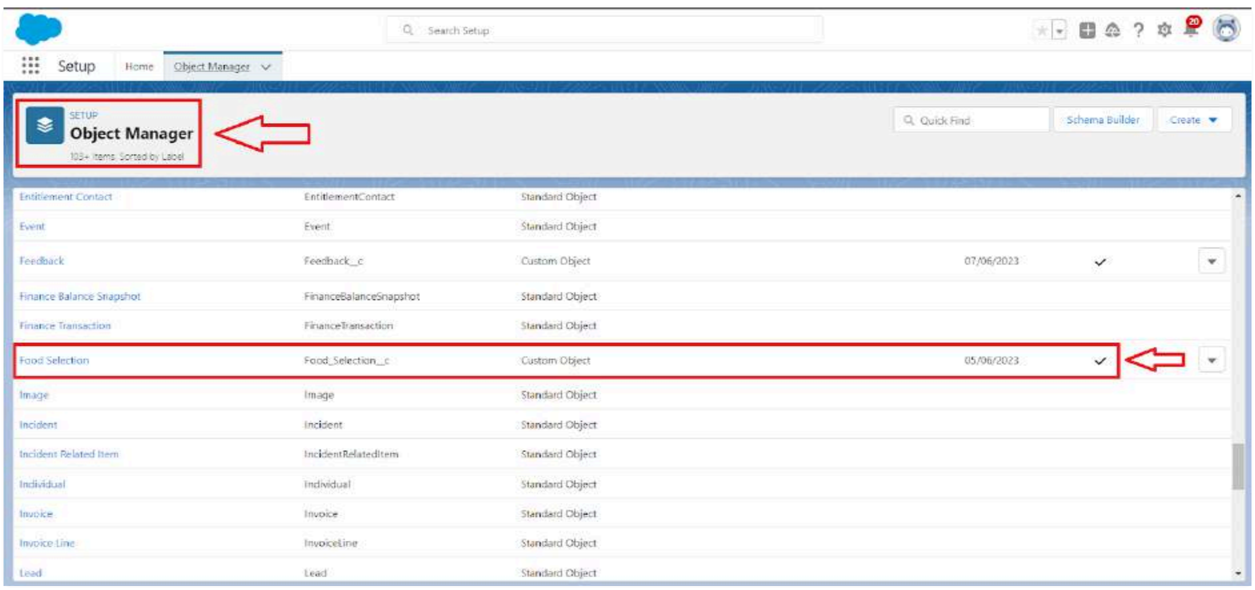
**Step 2 :** Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.

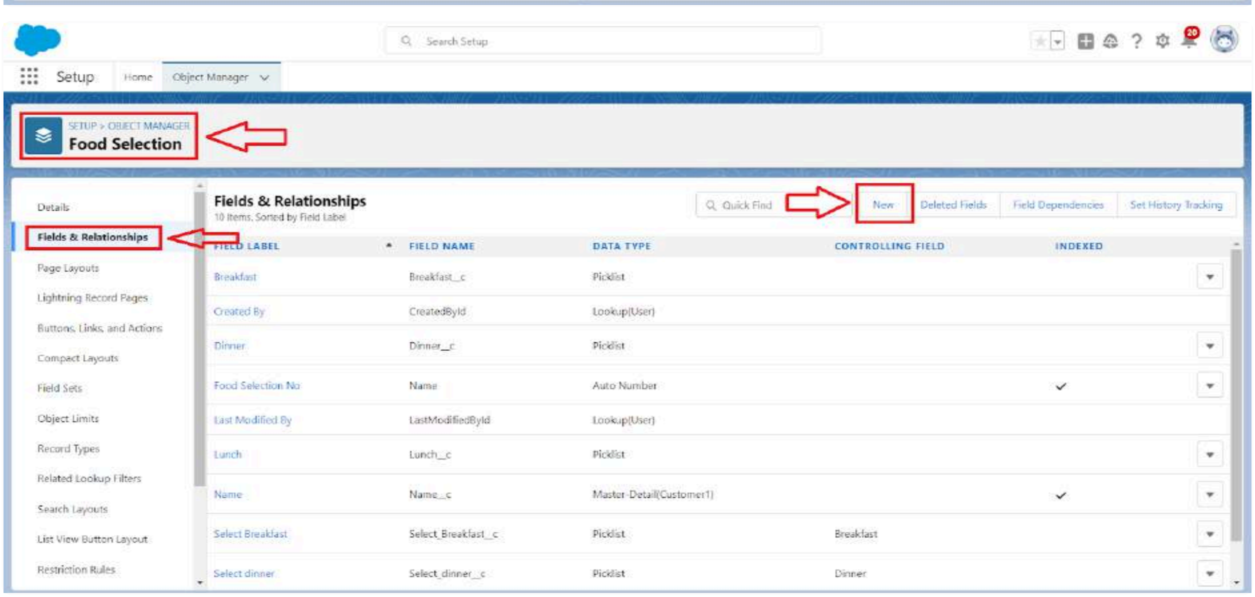
**Step 3 :** Now click on “Fields & Relationships” > New

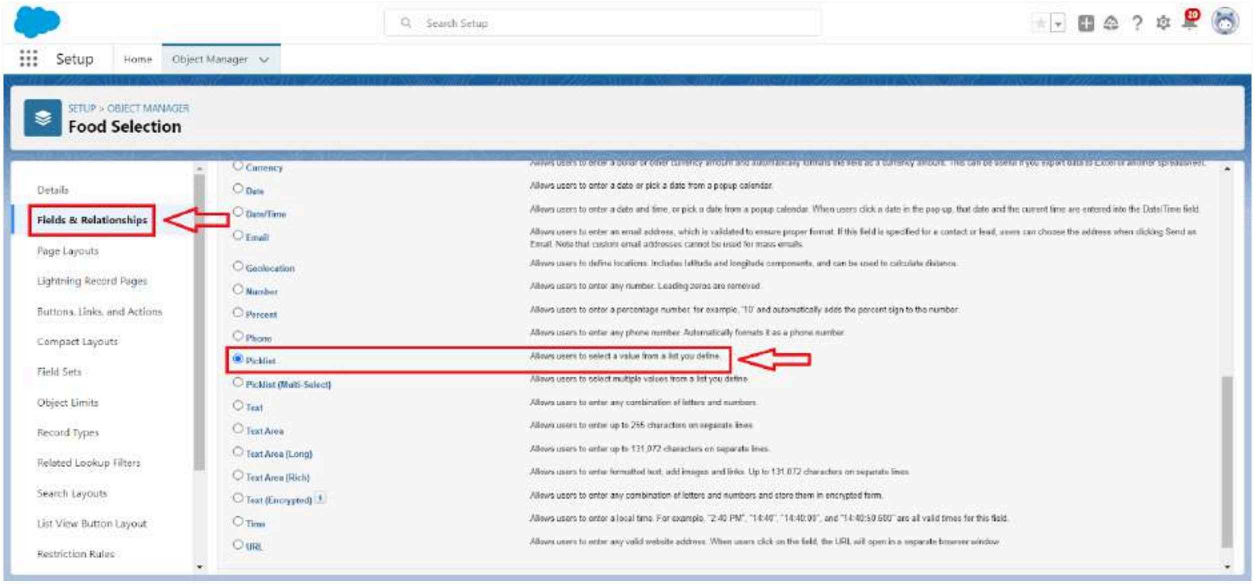
**Step 4 :** Select Data Type as a “Picklist”

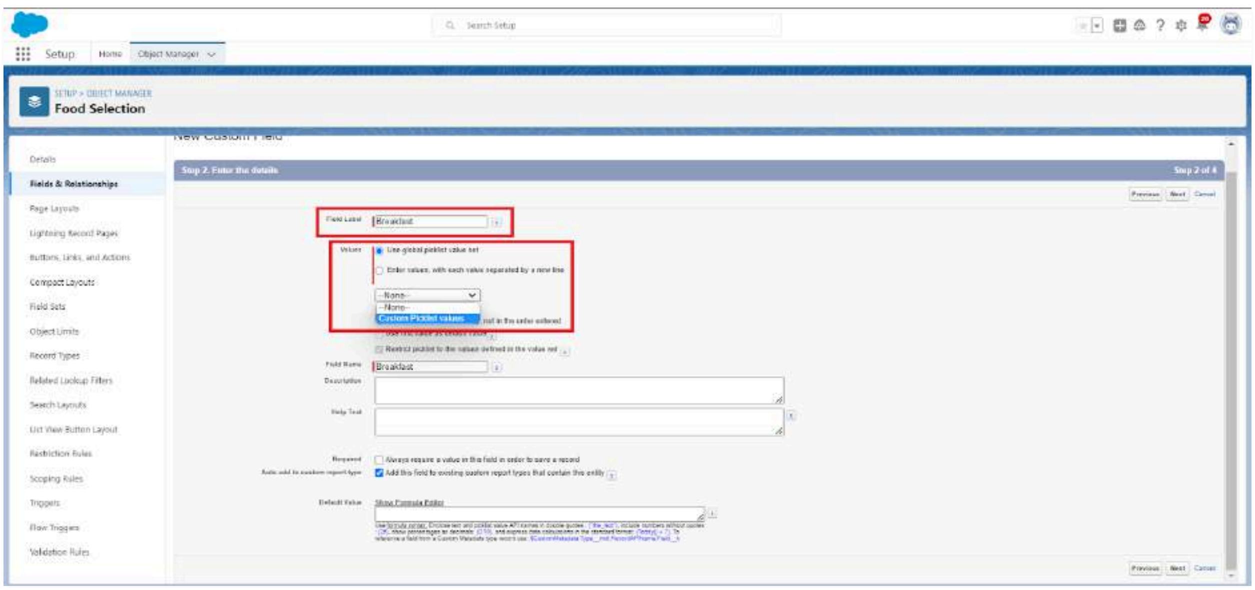
**Step 5 :** Fill the Above as following:

- 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 . Field Name :** " Select Breakfast "

Creating a another picklist Field for Food selection object

Follow the below steps create a picklist Field for Food selection object

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Picklist”

**Step 4 :** Fill the Above as following:

- Field Label: Select Breakfast
- Under Value - Enter values, with each value separated by a new line

  i. Idli

  ii. Bonda

  iii. Dosa

iv. Upma

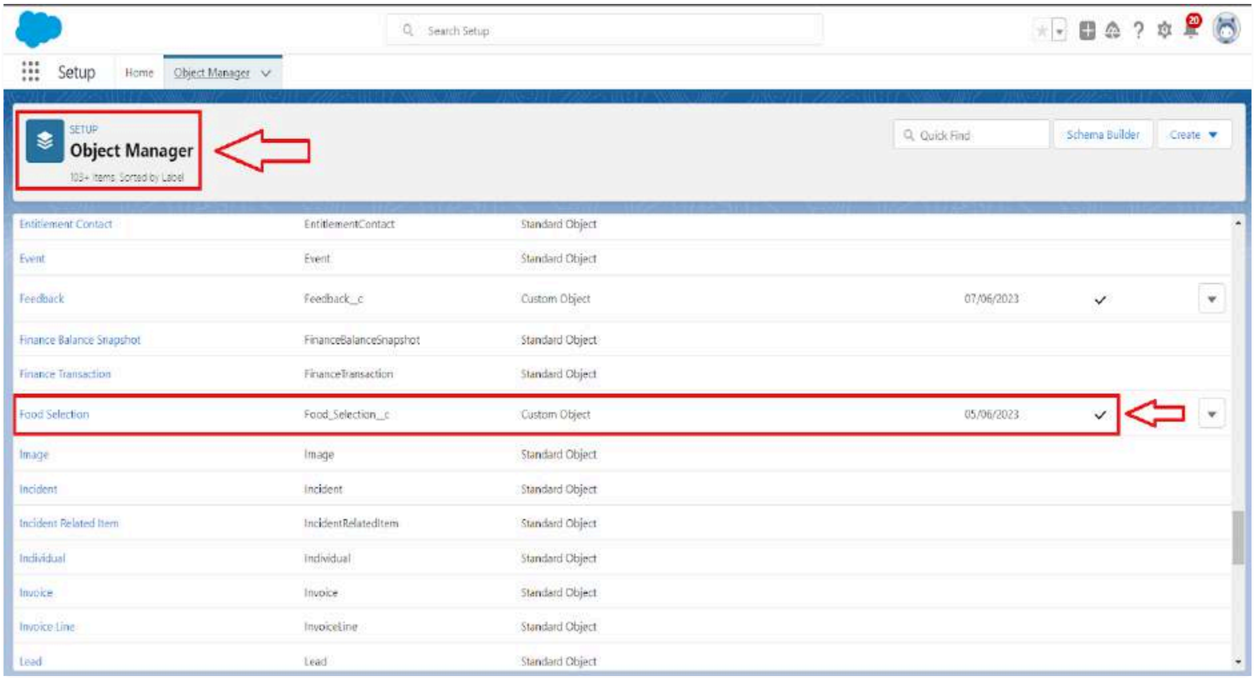
v. Vada

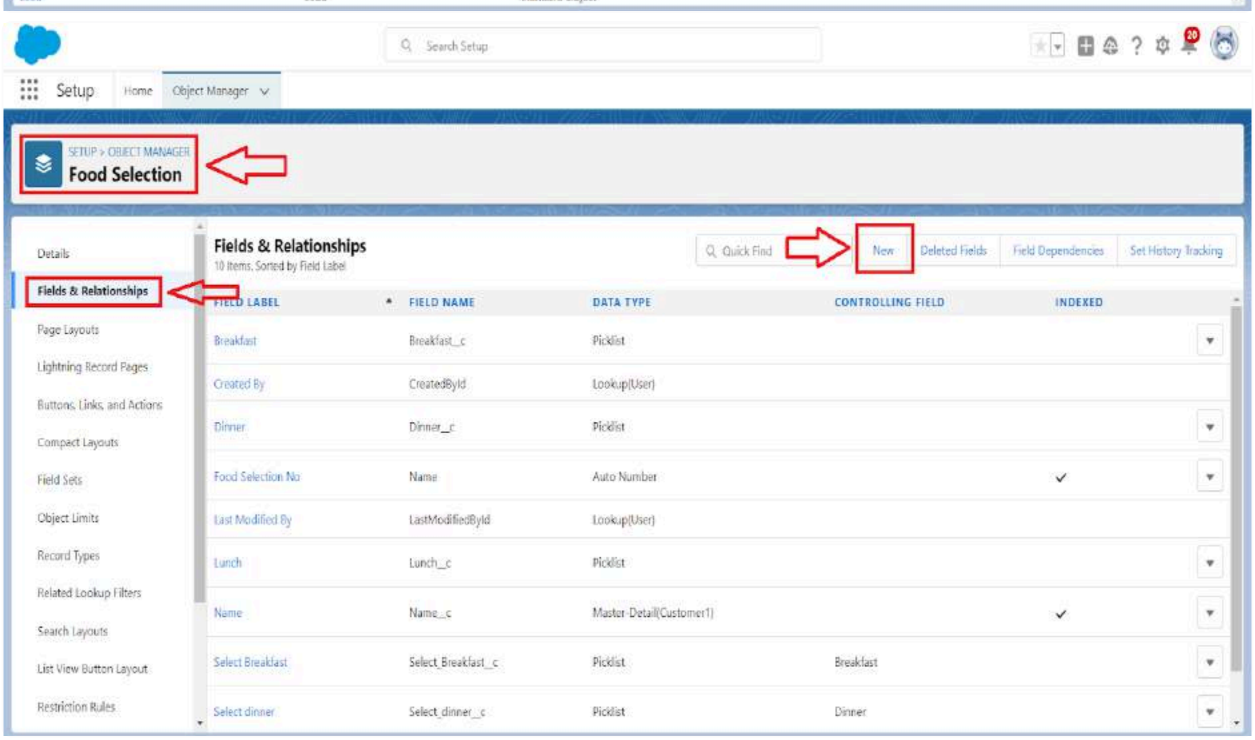
vi. Puri

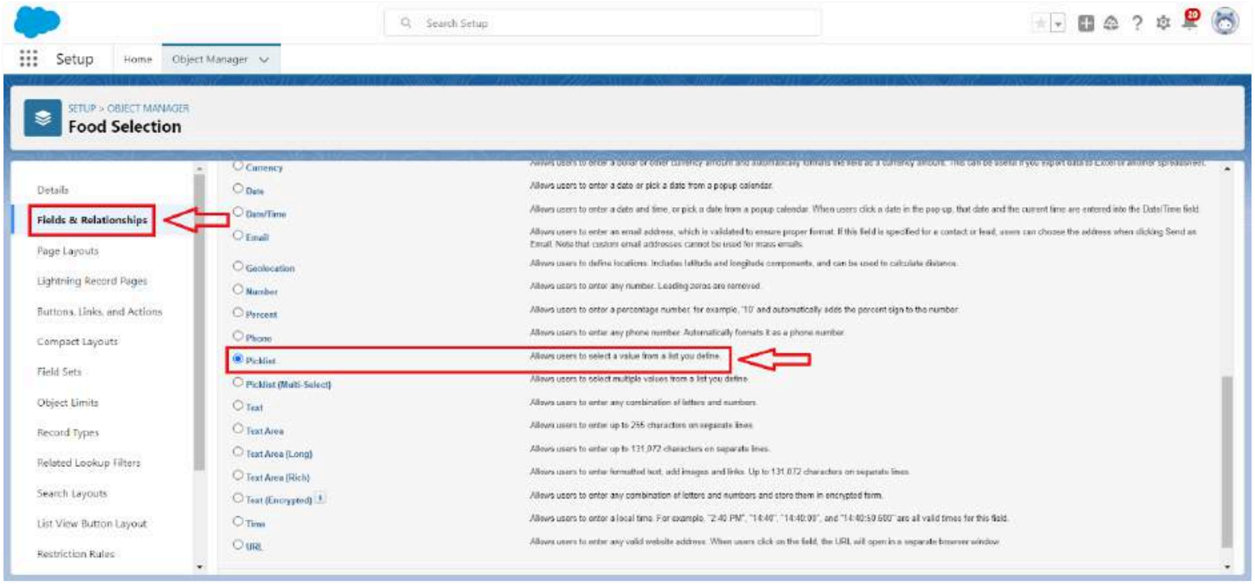
vii. Chapati

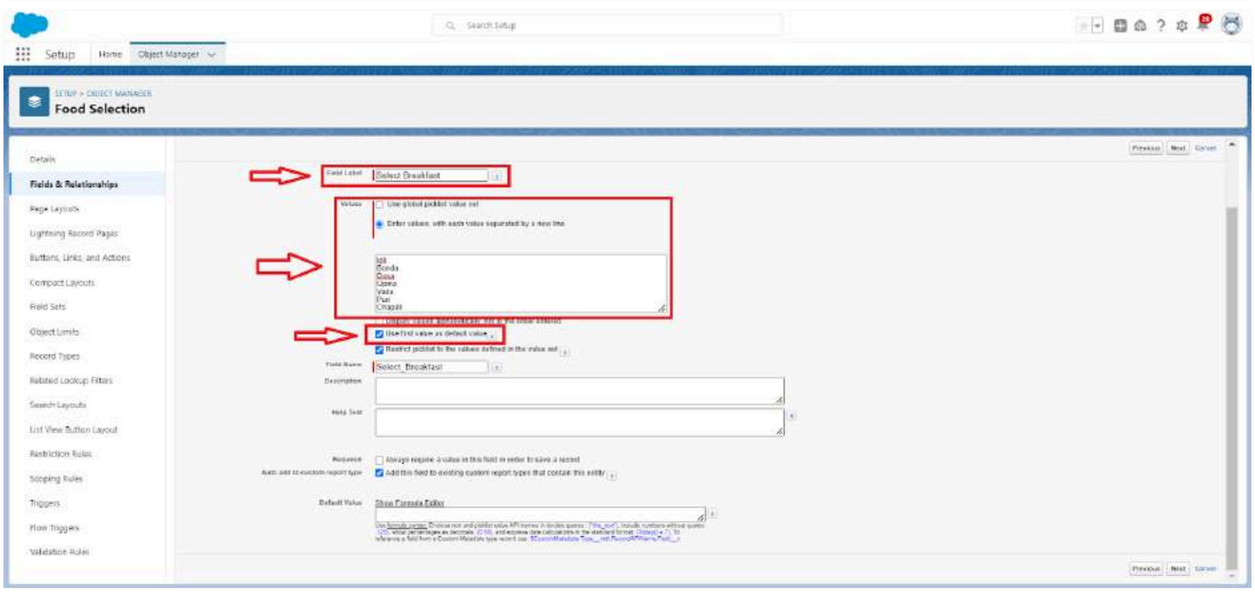
**Step 5:** Select Checkbox Use First value as default Value

**Step 6 :** Click on Next > Next > Save and new.






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

Follow the below steps to create Field Dependency in an object:

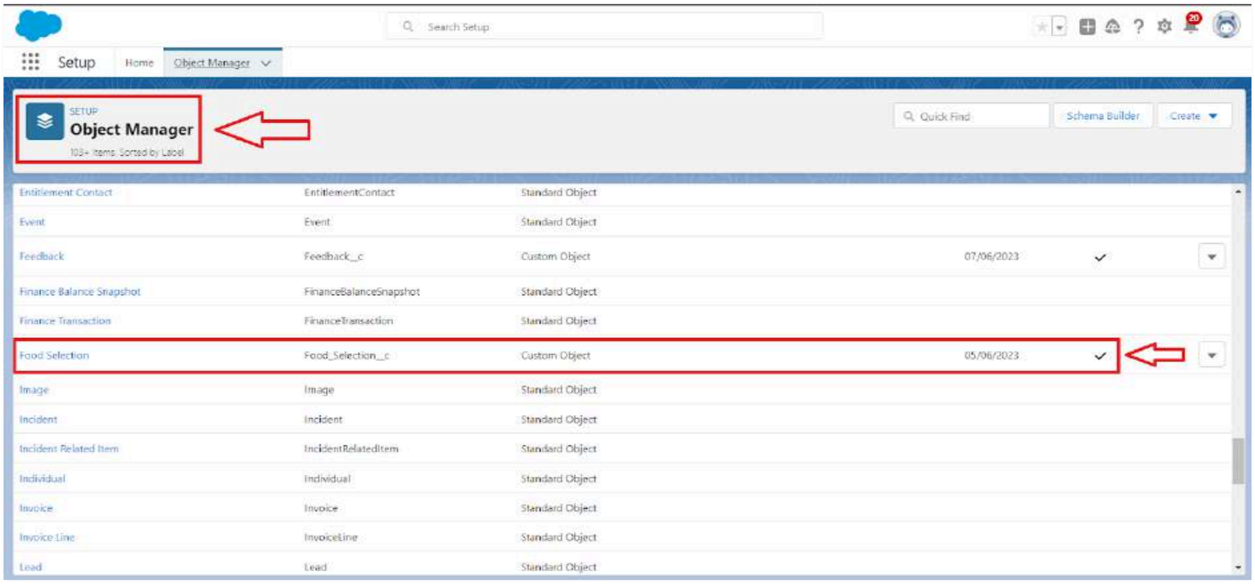
**Step 1 :** Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.

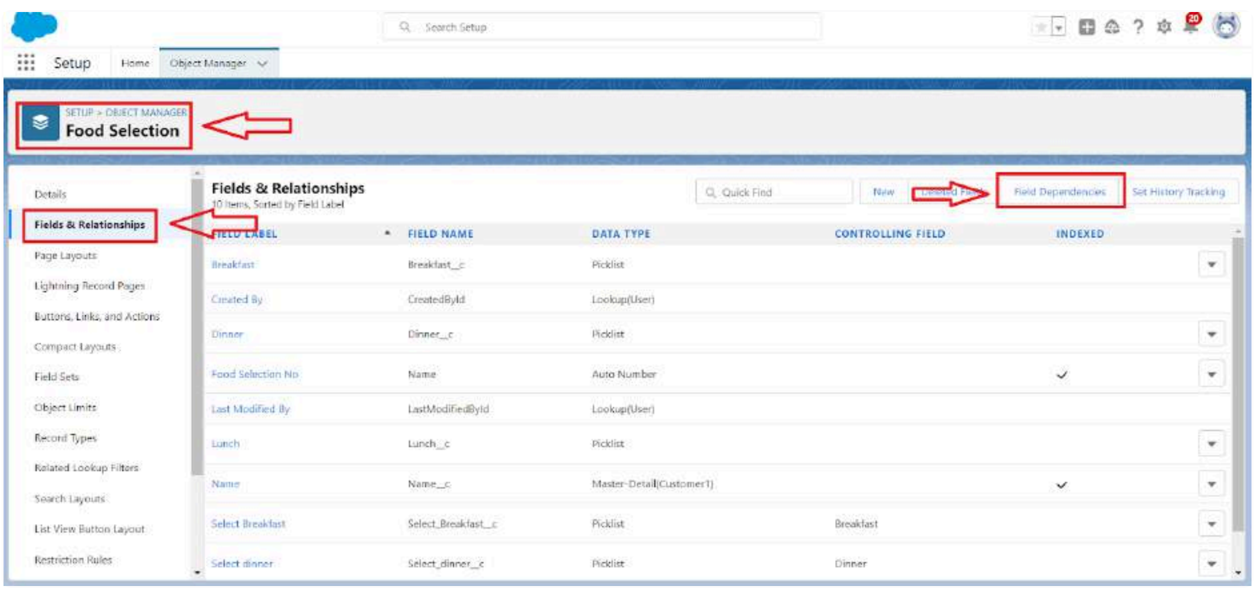
**Step 2 :** Now Click on fields & relationships and Click on Field Dependencies

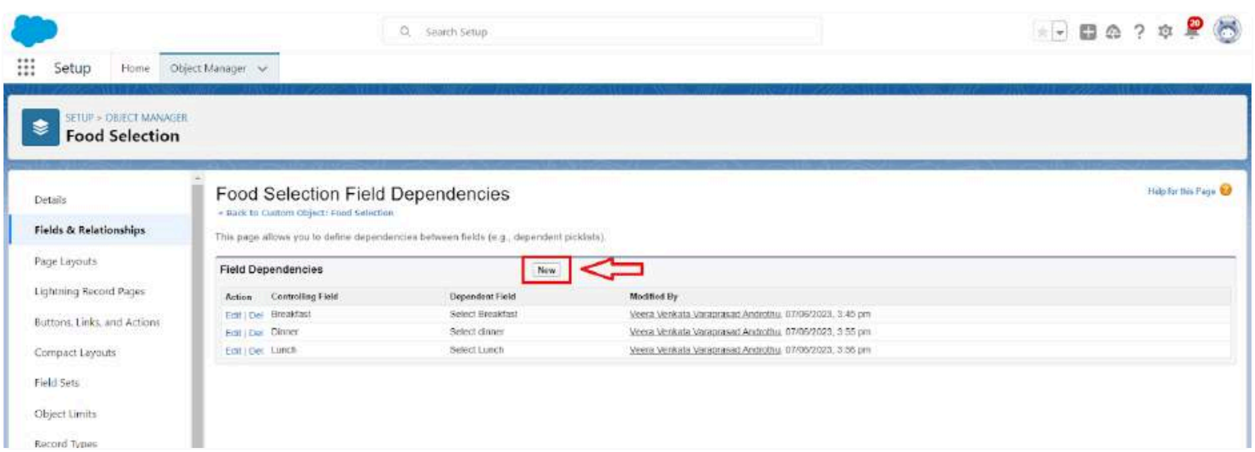
**Step 3 :** Now Click on New Option

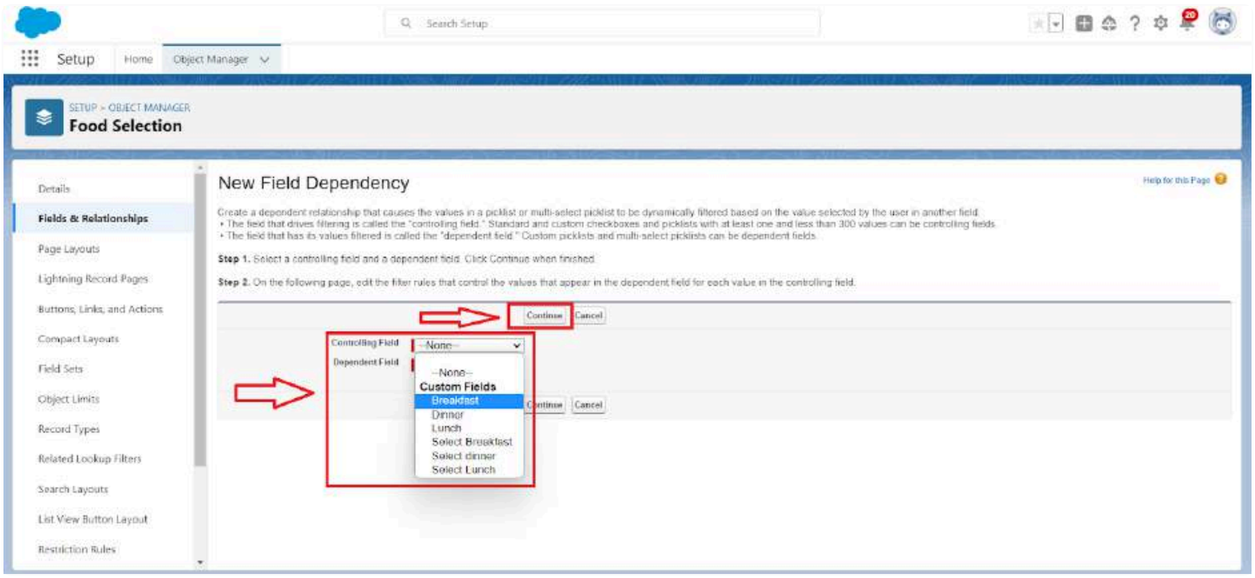
**Step 4 :** Under Controlling Field: Breakfast, Dependent Field: Select Breakfast and Click on Continue

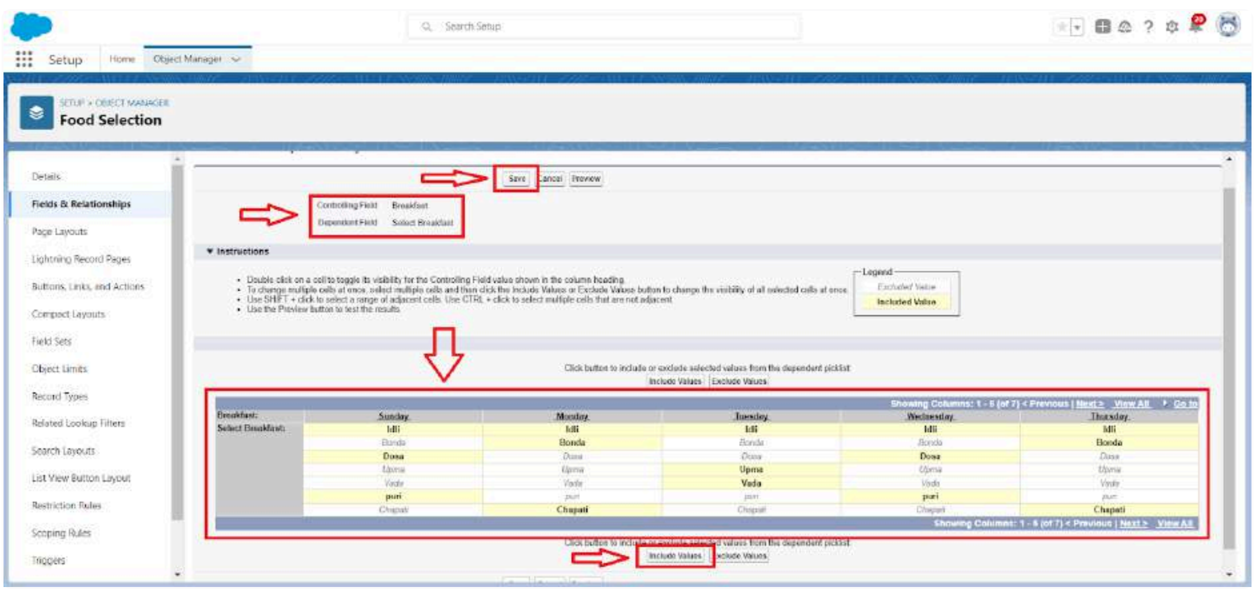
**Step 5 :** Under the Sunday Ctrl and select the Picklist values Idli,Dosa,Puri and Click on Include Values in such a way that do for the remaining days and click on save.


Setup
Home
Object Manager
SETUP
Object Manager
Quick Find
Schema Builder
Create
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


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Food Selection
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
10 Items, Sorted by Field Label
Quick Find
New
Field Dependencies
Set History Tracking
FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED
Breakfast Breakfast__c Picklist
Created By CreatedById Lookup(User)
Dinner Dinner__c Picklist
Food Selection No Name Auto Number
Last Modified By LastModifiedById Lookup(User)
Lunch Lunch__c Picklist
Name Name__c Master-Detail(Customer1)
Select Breakfast Select_Breakfast__c Picklist Breakfast
Select dinner Select_dinner__c Picklist Dinner


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Food Selection
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Food Selection Field Dependencies
Help for this Page
This page allows you to define dependencies between fields (e.g., dependent picklists).
Field Dependencies
New
Action Controlling Field Dependent Field Modified By
Edit | Del Breakfast Select Breakfast
Edit | Del Dinner Select dinner
Edit | Del Lunch Select Lunch




## 4 . Field Name : " Lunch "

Follow the below steps create a Field for Food selection object

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Picklist”

**Step 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

**Step 5 :** Click on Next > Next > Save and new.

## 5 . Field Name : " Select Lunch "

Follow the below steps create a Field for Food selection object

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Picklist”

**Step 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.

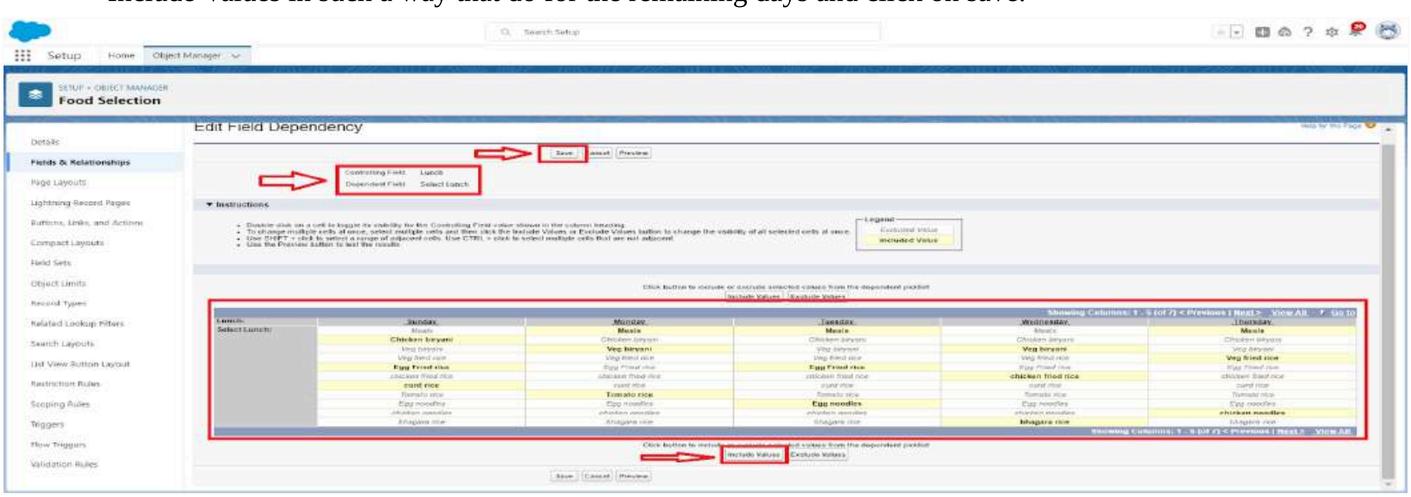
**Step 1 :** Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.

**Step 2 :** Now Click on fields & relationships and Click on Field Dependencies

**Step 3 :** Now Click on New Option

**Step 4 :** Under Controlling Field:Lunch, Dependent Field: Select Lunch and Click on Continue

**Step 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 . Field Name : "** Dinner **"**

Follow the below steps create a Field for Food selection object

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Picklist”

**Step 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 . Field Name : "** Select Dinner **"**

Follow the below steps create a Field for Food selection object

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Picklist”

**Step 4 :** Fill the Above as following:

- Field Label: Select Dinner
- Under Value **-** Enter values, with each value separated by a new line
    1. Meals
    2. Chicken biryani
    3. Veg biryani
    4. Veg fried rice
    5. Egg fried rice
    6. Chicken fried rice
    7. Curd rice
    8. Tomato rice
    9. Egg noodles
    10. Chicken Noodles
    11. Bhagara rice
    12. Select Checkbox Use First value as default Value
    13. Click on Next > Next > Save and new.

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

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

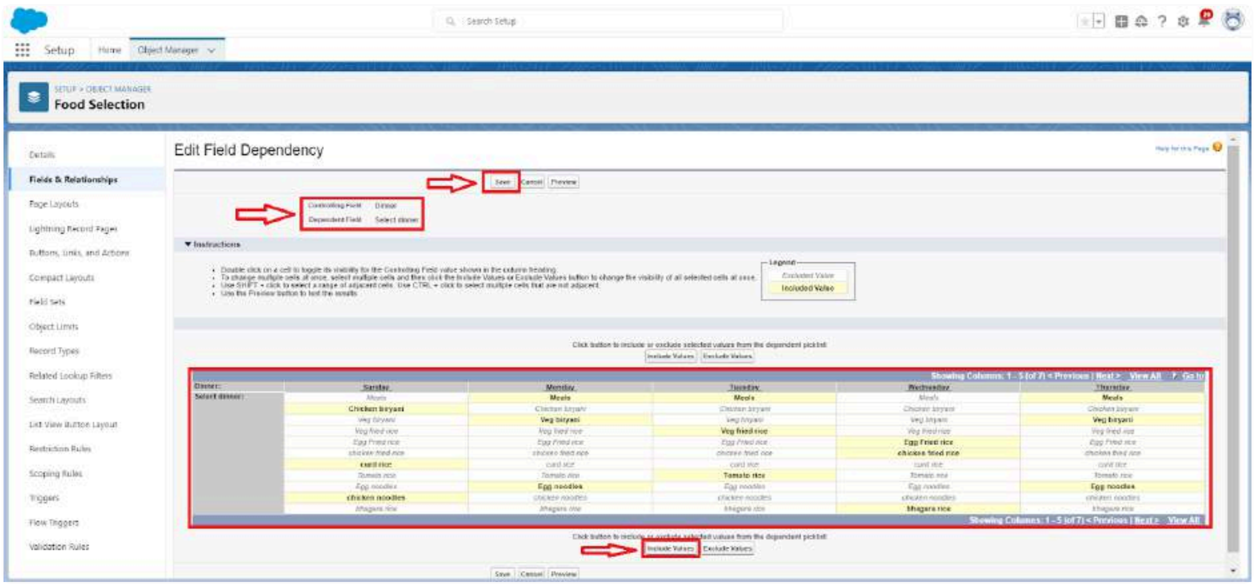
**Step 2 :** Now Click on fields & relationships and Click on Field Dependencies

**Step 3 :** Now Click on New Option

**Step 4 :** Under Controlling Field: Dinner, Dependent Field: Select Dinner and Click on Continue

**Step 5 :** Under the Sunday click Ctrl and select the Picklist values Chicken biryani, curd rice, Chicken noodles

**Step 6 :** Click on Include Values in such a way that do for the remaining days and click on save.




## Task 6.5 : Creation of fields for the Feedback object

### 1 . Field Name : " Name "

Follow the below steps create a Field & Relationship for Feedback object

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

**Step 2 :** Now click on “Fields & Relationships” > New

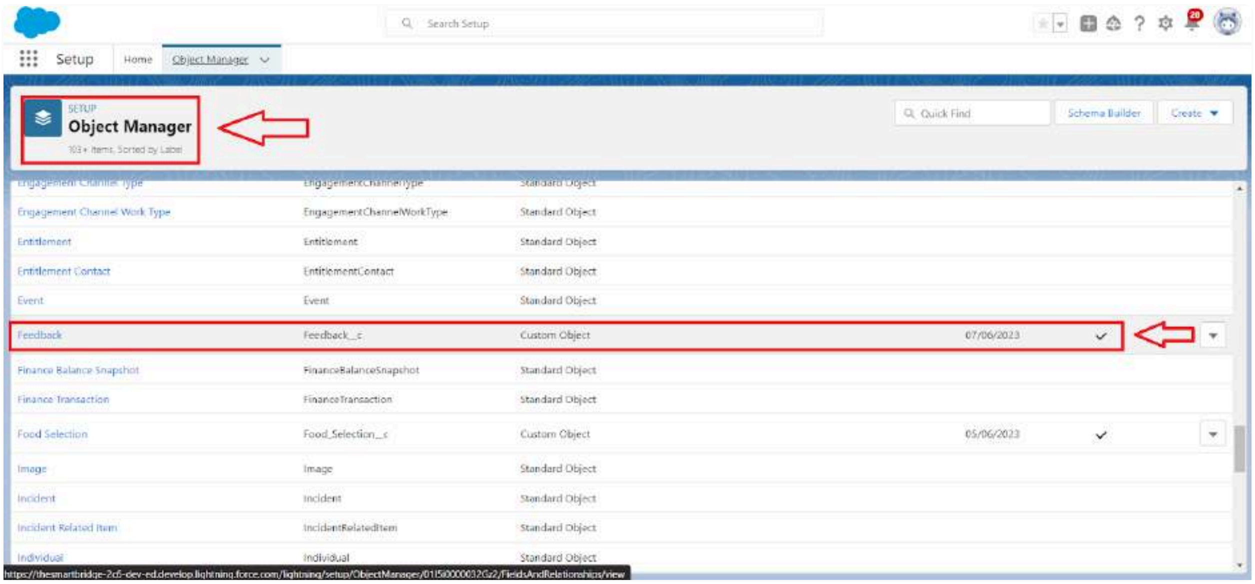
**Step 3 :** Select Data Type as a “Lookup Relationship”

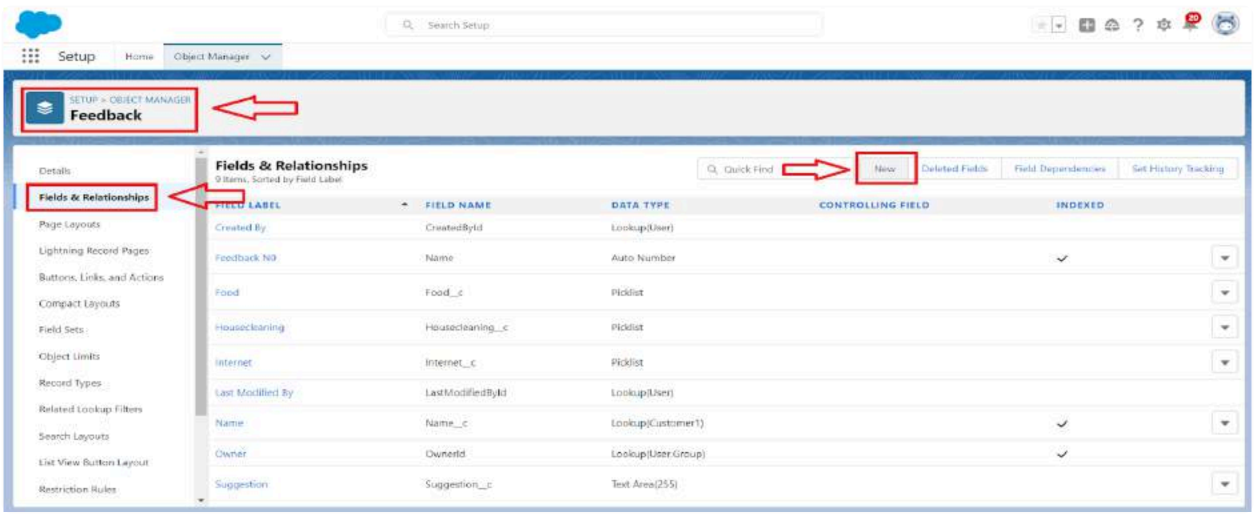
**Step 4 :** Click on Next

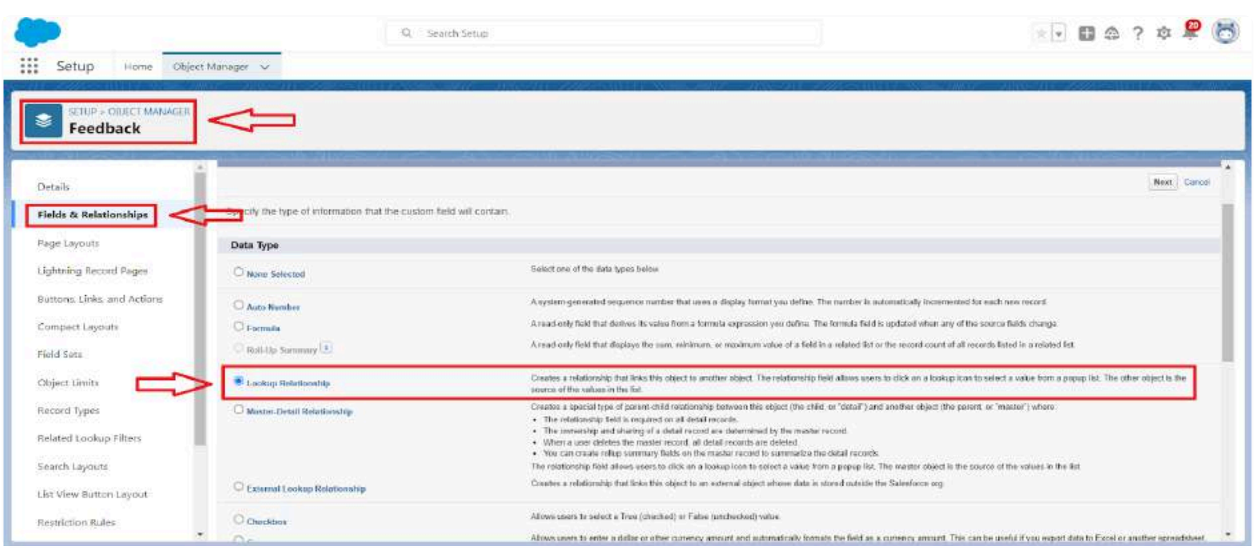
**Step 5 :** Click on the Related to drop down and Select the Customer1 object and click on Next

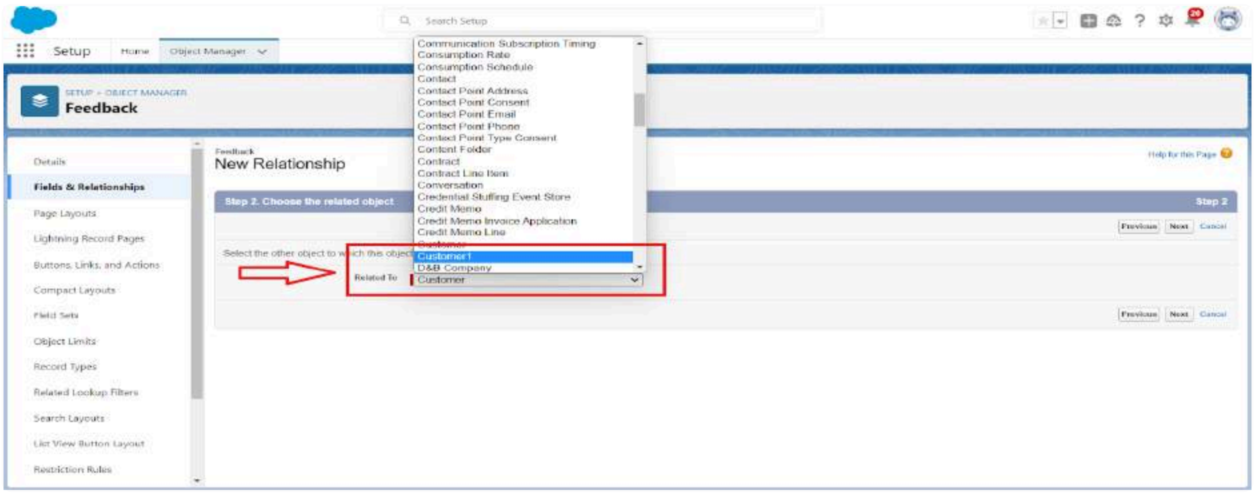
**Step 6 :** Fill the Above as following:

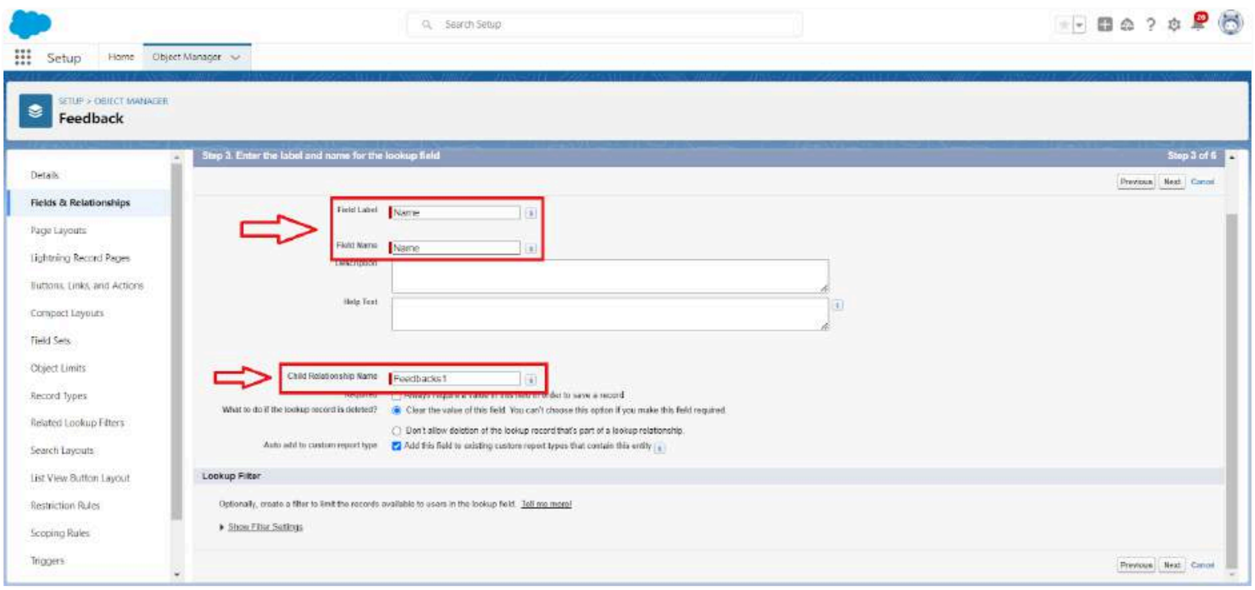
- Change the Field Label: Name
- Field Name :It’s gets auto generated
- Click on Next > Next > Save and new.











## 2 . Field Name : " Roomcleaning "

Follow the below steps create a Field & Relationship for Feedback object

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Picklist”

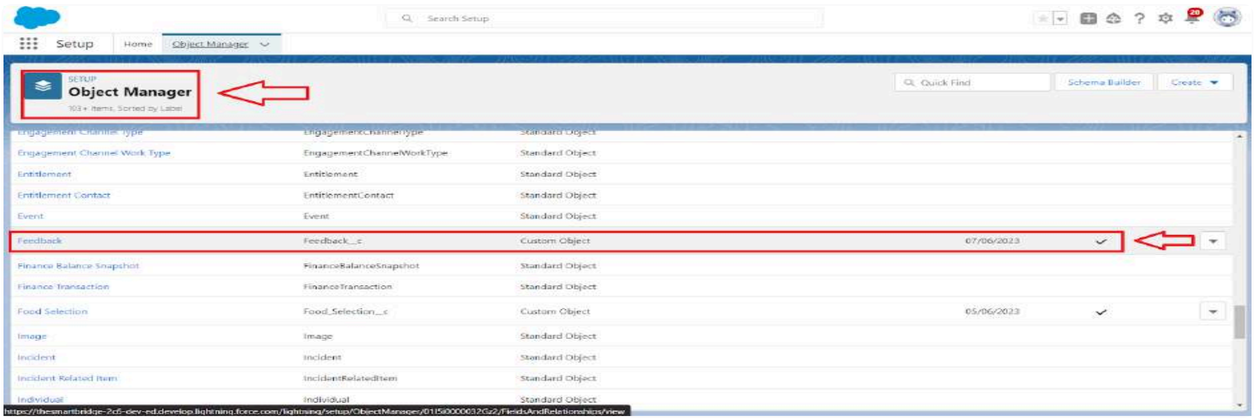
**Step 4 :** Click on Next

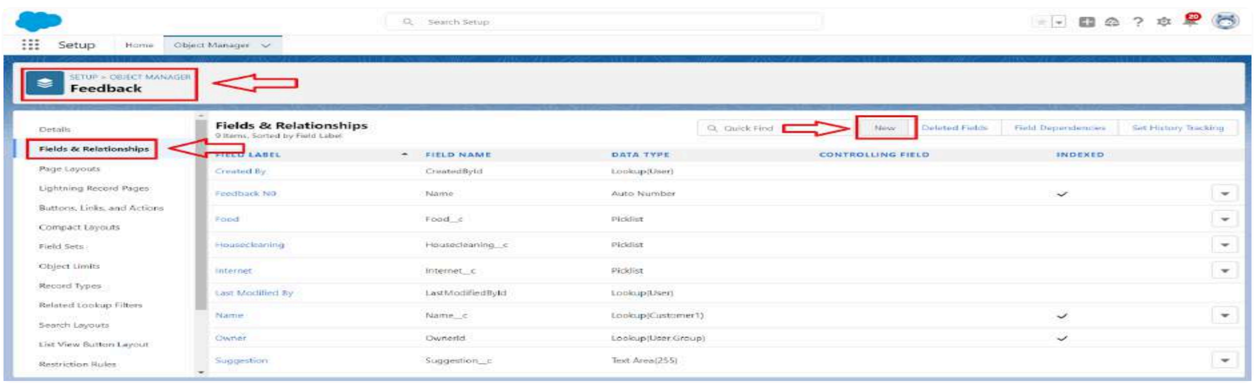
**Step 5 :** Fill the Above as following:

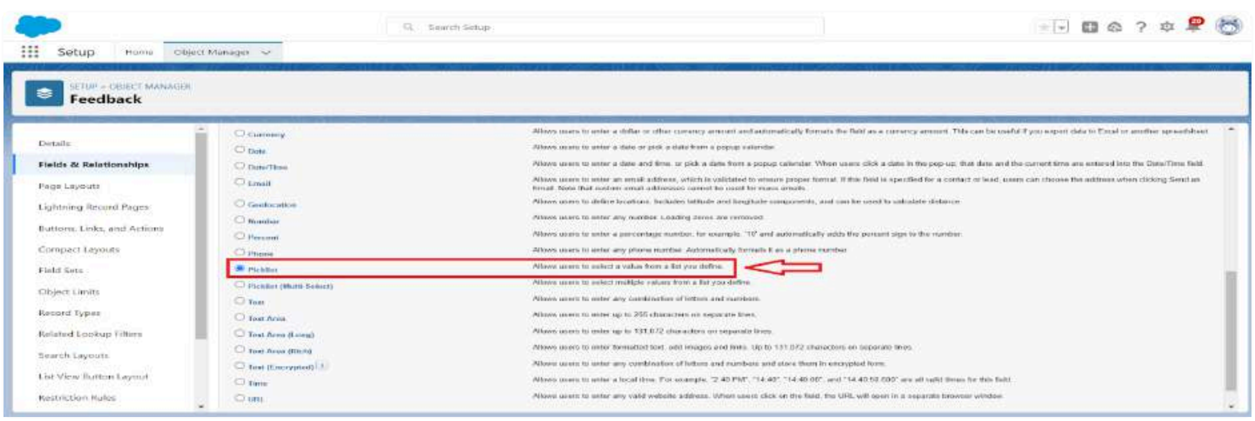
- Field Label: Roomcleaning
- Field Name :It’s gets auto generated
- Under Values select Enter values, with each value separated by a new line

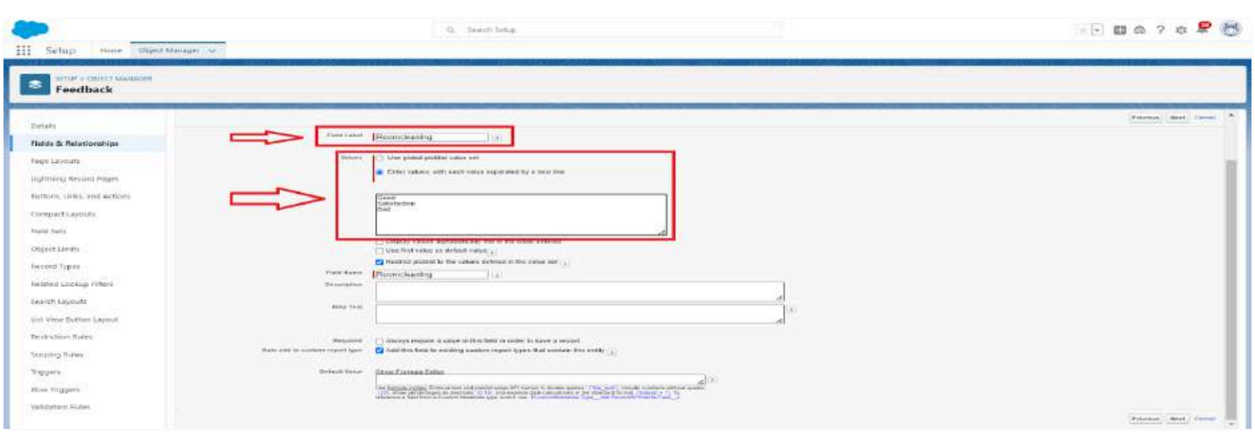
1. Good
2. Satisfaction
3. Bad

**Step 6 :** Click on Next > Next > Save and new.


Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
103+ Items, Sorted by Label
Quick Find
Schema Builder
Create
Engagement Channel Work Type
EngagementChannelWorkType
Standard Object
Entitlement
Standard Object
Entitlement Contact
EntitlementContact
Event
Feedback
Feedback__c
Custom Object
07/06/2023
Finance Balance Snapshot
FinanceBalanceSnapshot
Finance Transaction
FinanceTransaction
Food Selection
Food_Selection__c
05/06/2023
Image
Incident
Incident Related Item
IncidentRelatedItem
Individual


SETUP > OBJECT MANAGER
Feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
9 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Feedback NO
Name
Auto Number
Food
Food__c
Picklist
Housecleaning
Housecleaning__c
Internet
Internet__c
Last Modified By
LastModifiedById
Name__c
Lookup(Customer1)
Owner
OwnerId
Lookup(User,Group)
Suggestion
Suggestion__c
Text Area(255)


SETUP > OBJECT MANAGER
Feedback
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted)
Time
URL
Allows users to select a value from a list you define.


SETUP > OBJECT MANAGER
Feedback
Field Label
Roomcleaning
Values
Good
Satisfaction
Bad
Field Name
Description
Help Text
Default Value

**3 . Field Name : "** Internet **"**

Follow the below steps create a Field & Relationship for Feedback object

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

**Step 2 :** Now click on “Fields & Relationships” ? New

**Step 3 :** Select Data Type as a “Picklist”

**Step 4 :** Click on Next

**Step 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

**Step 6 :** Click on Next > Next > Save and new.

**4 . Field Name : "** Food **"**

Follow the below steps create a Field & Relationship for Feedback object

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

**Step 2 :** Now click on “Fields & Relationships” ? New

**Step 3 :** Select Data Type as a “Picklist”

**Step 4 :** Click on Next

**Step 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

**Step 6 :** Click on Next > Next > Save and new.

**5 . Field Name : "** Dinner **"**

Follow the below steps create a Field & Relationship for Feedback object

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data Type as a “Text area”

**Step 4 :** Click on Next

**Step 5 :** Fill the Above as following:

- Field Label: Suggestion
- Field Name :It’s gets auto generated

**Step 6 :** Click on Next > Next > Save and new.

## Task 6.6 : Creation of fields for the Total Rooms object

**1 . Field Name : "** Rooms Available **"**

Follow the below steps create a Field for Total Rooms object

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

**Step 2 :** Now click on “Fields & Relationships” > New

**Step 3 :** Select Data type as a “Formula” and Click on Next

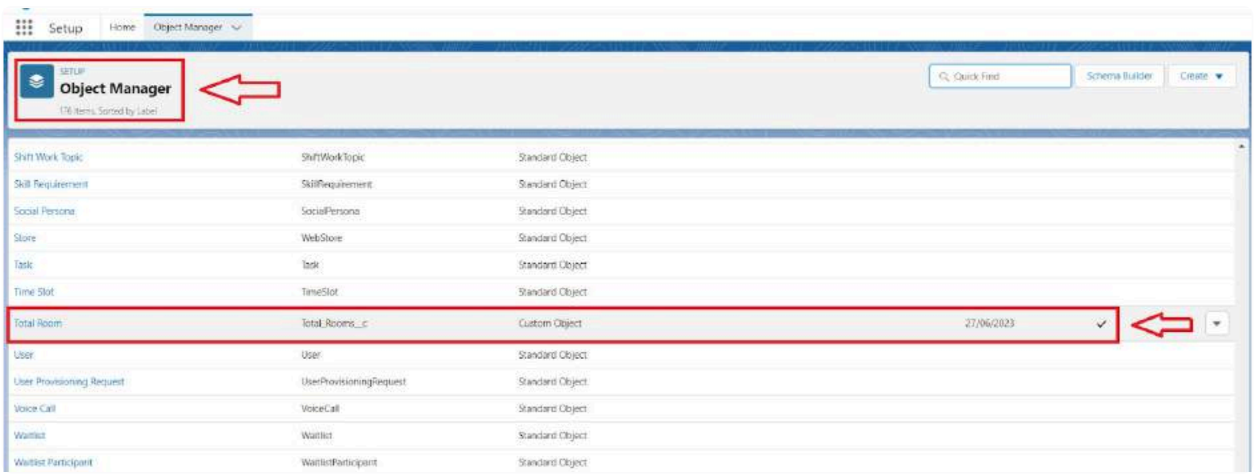
**Step 4 :** Fill the Above as following:

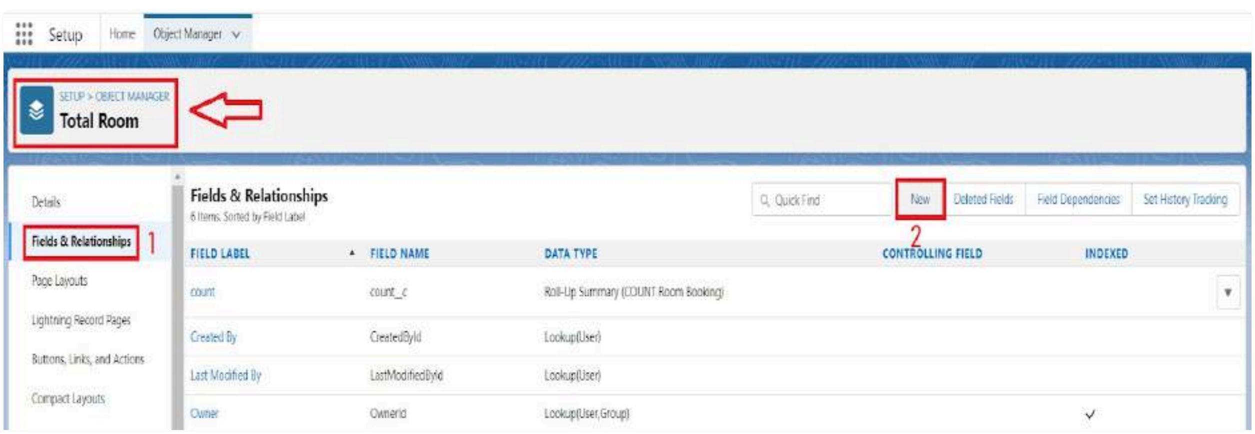
- Field Label: Rooms Available
- Field Name : It’s gets auto generated
- Select the Formula Return Type as “Number”
- Select the Decimal places as “0” and Click on Next

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

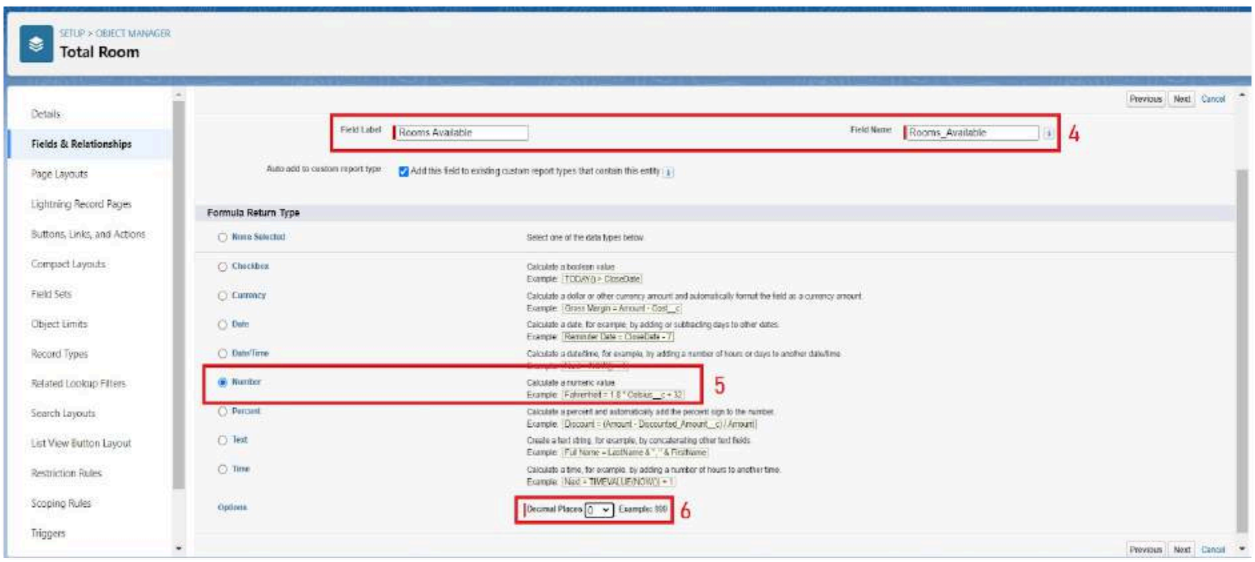
**Step 5 :** Click on the Advanced Formula “ 30 -  Rooms_Booked__c ” and Check Syntax

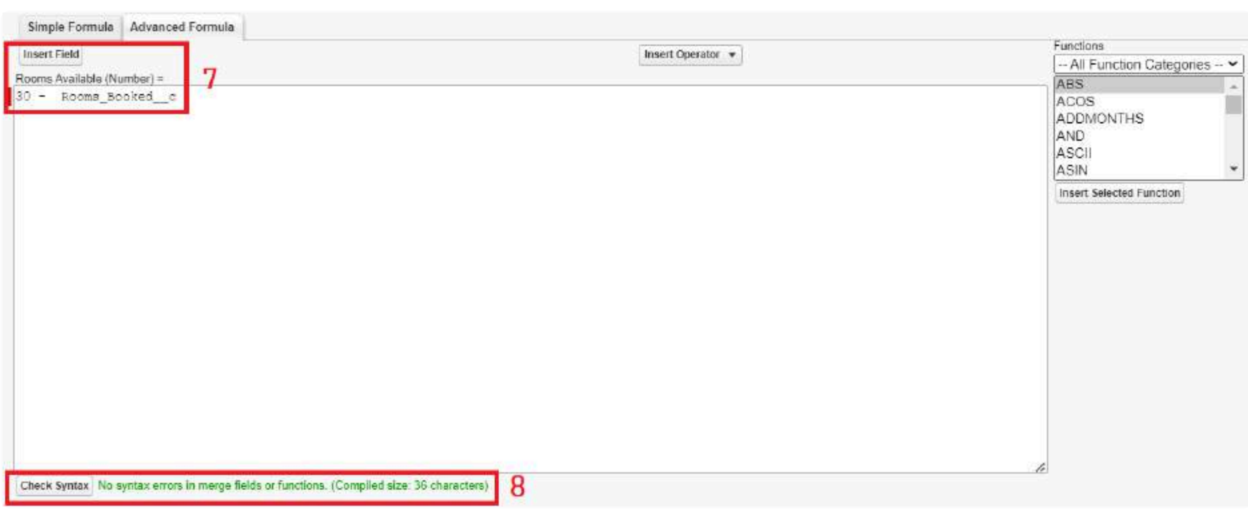
**Step 6 :** Click on Next > Next > Save and new.




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
Total Room
New Custom Field
Step 1. Choose the field type
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
Formula
Roll-Up Summary
Lookup Relationship
Master-Detail Relationship
3


SETUP > OBJECT MANAGER
Total Room
Field Label
Rooms Available
Field Name
Rooms_Available
4
Formula Return Type
None Selected
Checkbox
Currency
Date
Date/Time
Number
Percent
Text
Time
5
Options
Decimal Places
6
Previous
Next
Cancel


Simple Formula
Advanced Formula
Insert Field
Insert Operator
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
Rooms Available (Number) =
30 - Rooms_Booked__c
7
Check Syntax
No syntax errors in merge fields or functions. (Compiled size: 36 characters)
8

# TASK 7 : Adding Validation rule

## RULE 1 : create a validation rule to an Room Booking Object

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

**Step 2 :** Now click on “Validation rule” at top > New.

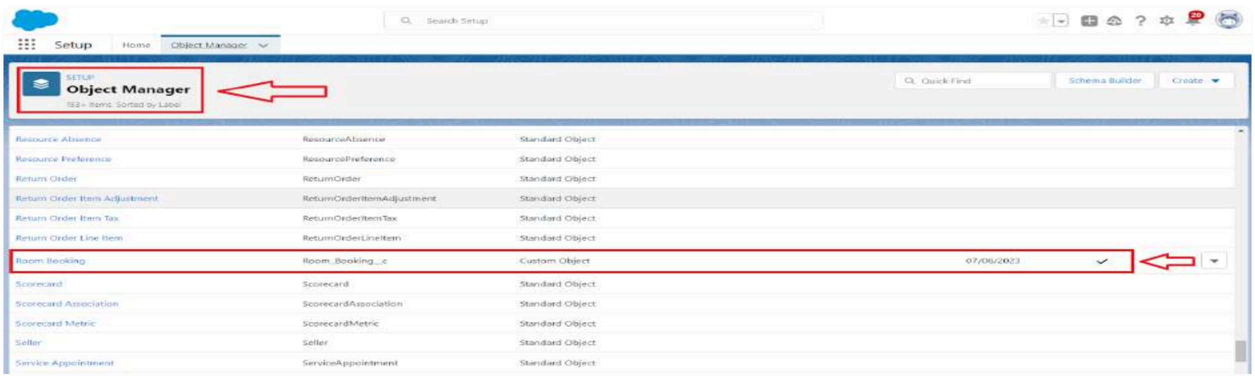
**Step 3 :** Enter Rule name “checkbox field” and make the validation should be Active.

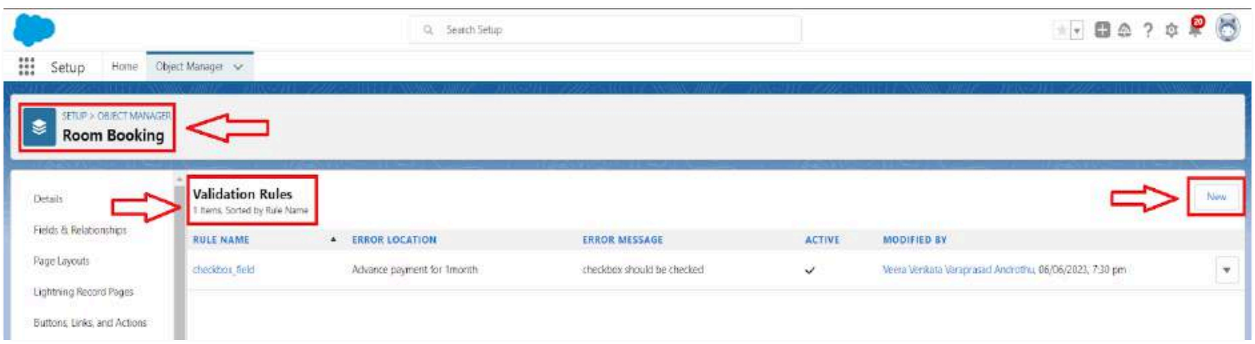
**Step 4 :** Enter the formula in the formula Box “Advance_payment_for_1month__c = false” and check for syntax error.

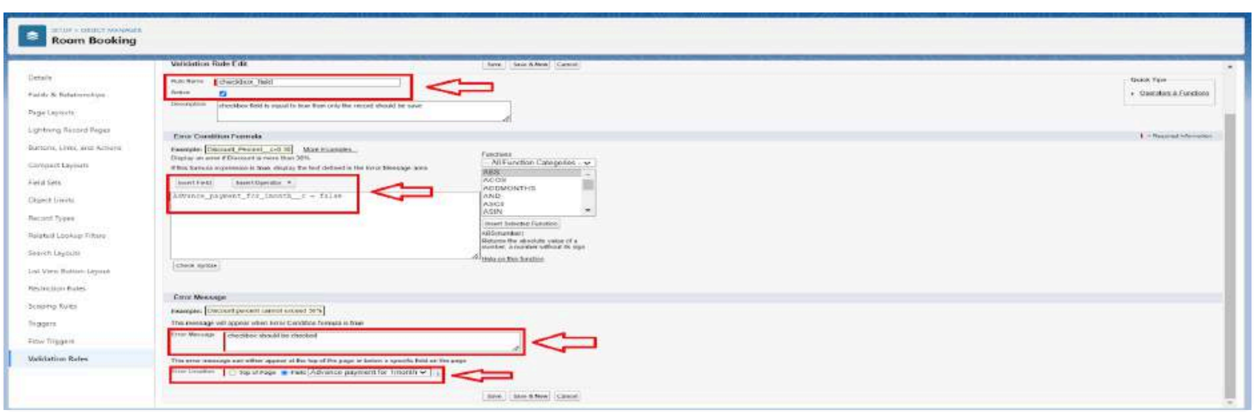
**Step 5 :** Enter the error message “Checkbox should be checked”

**Step 6 :** Select error location as field(Advance payment for 1month)

**Step 7 :** Click on save.



## RULE 2 : create a Another validation rule to an Room Booking Object

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

**Step 2 :** Now click on “Validation rule” at top > New.

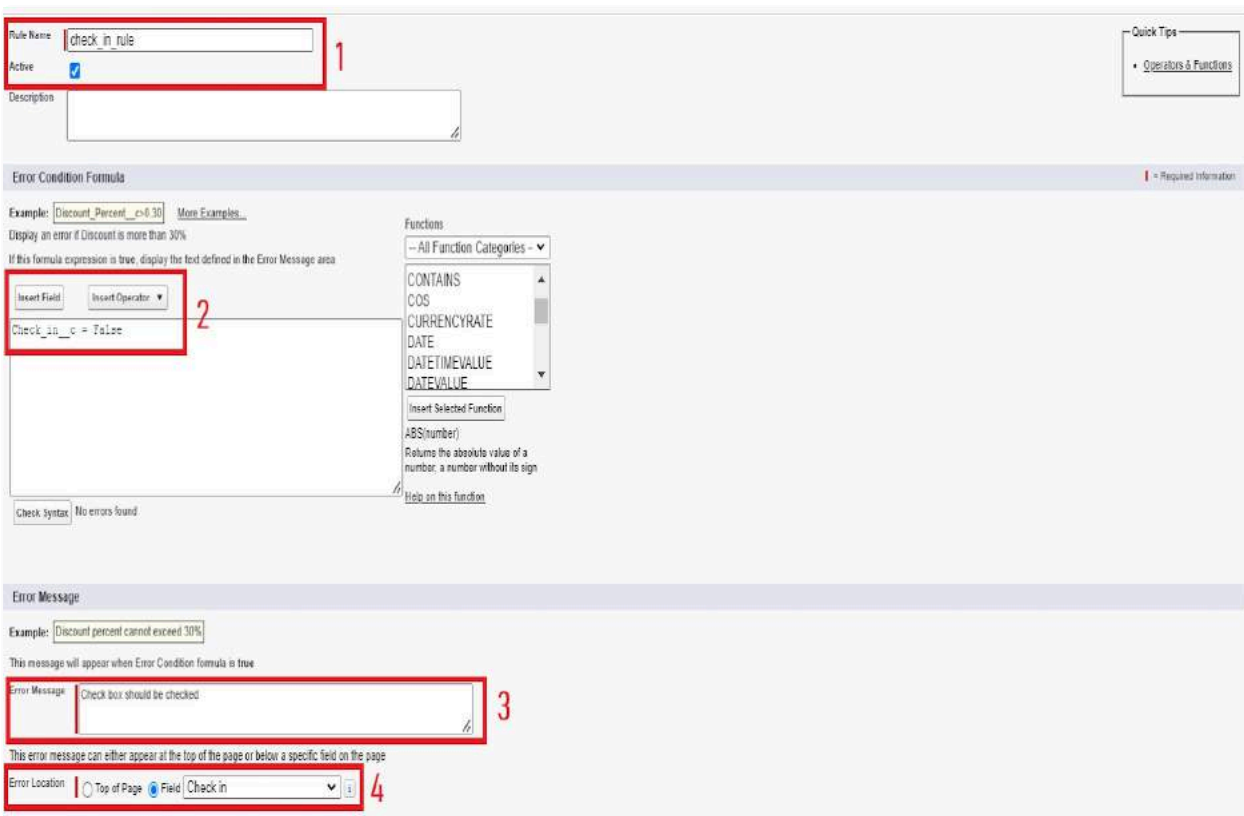
**Step 3 :** Enter Rule name “check in rule” and make the validation should be Active.

**Step 4 :** Enter the formula in the formula Box “ Check_in__c = False ” and check for syntax error.

**Step 5 :** Enter the error message “Check box should be checked”

**Step 6 :** Select error location as field(Check in)

**Step 7 :** Click on save.



# TASK 8 : Creation Of Profiles

## Profile 1 : Custom user Profile

To create a new profile follow the below steps :

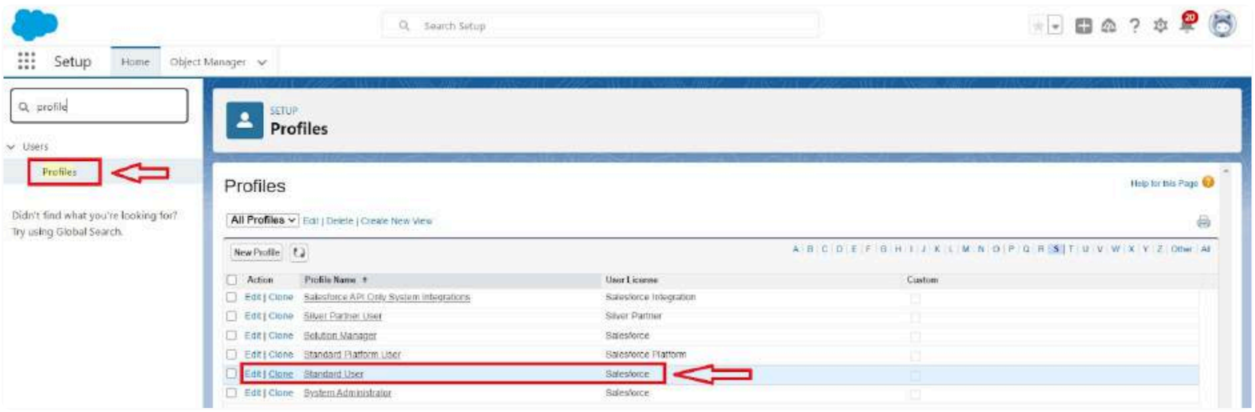
**Step 1 :** Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard User)

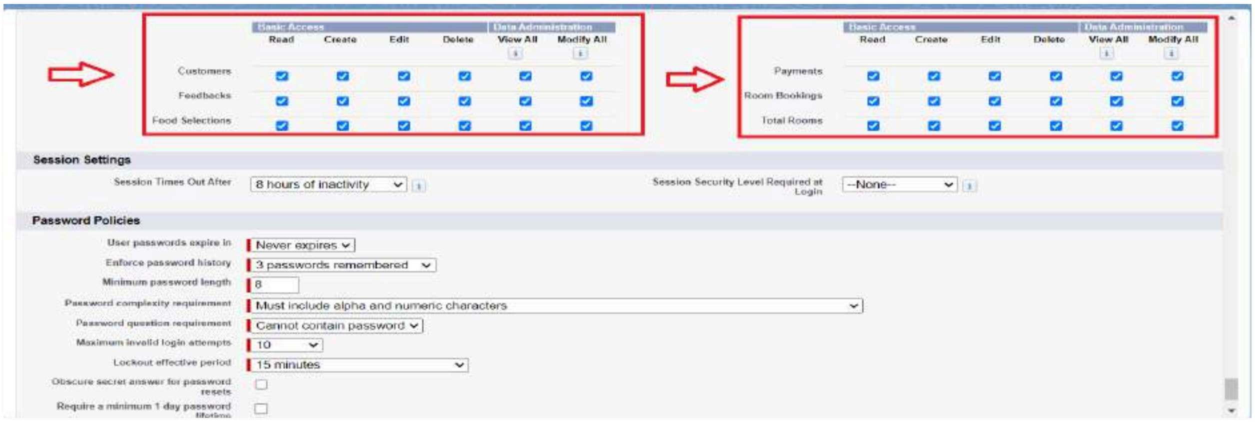
**Step 2 :** Enter profile name (Custom User) > Save.

**Step 3 :** While still on the profile page, then click Edit.

**Step 4 :** Scroll down to Custom Object Permissions and Give All access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

**Step 5 :** Scroll down and Click on Save.




## Profile 2 : Custom platform user1

To create a new profile follow the below steps :

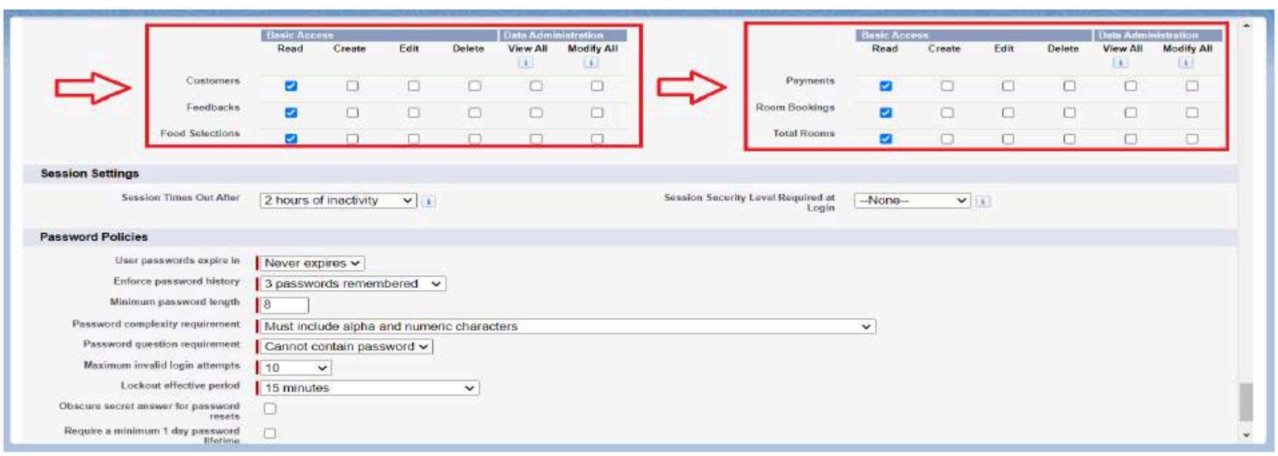
**Step 1 :** Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard platform User)

**Step 2 :** Enter profile name (Custom platform User1) > Save.

**Step 3 :** While still on the profile page, then click Edit.

**Step 4 :** Scroll down to Custom Object Permissions and Give only Read access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

**Step 5 :** Scroll down and Click on Save.




## Profile 3 : Custom Platform User2

To create a new profile follow the below steps :

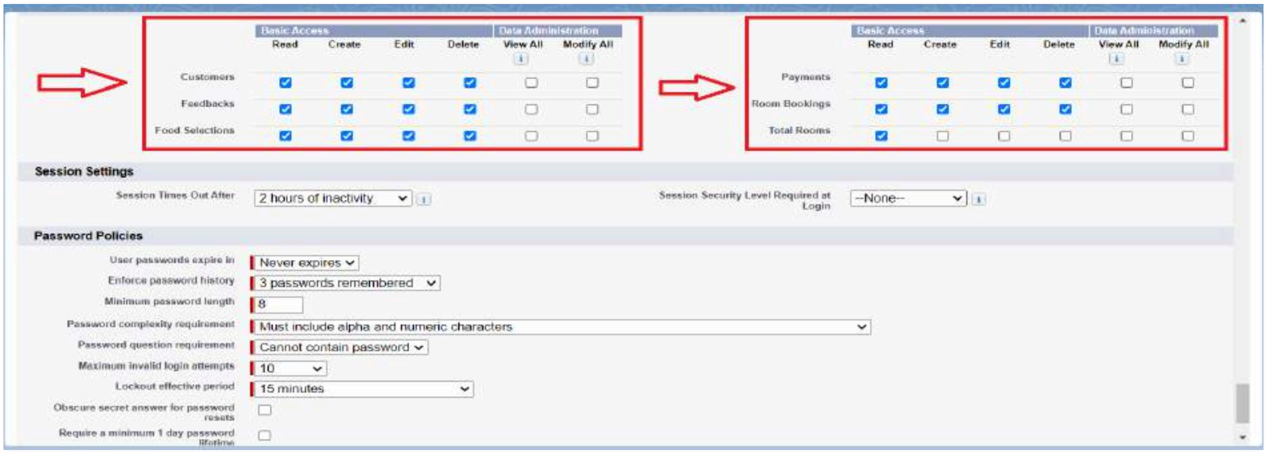
**Step 1 :** Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard platform User)

**Step 2 :** Enter profile name (Custom platform User2) > Save.

**Step 3 :** While still on the profile page, then click Edit.

**Step 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.

**Step 5 :** Scroll down and Click on Save.




# Task 9 : Roles Creation

## Role 1 : " Marketing Role "

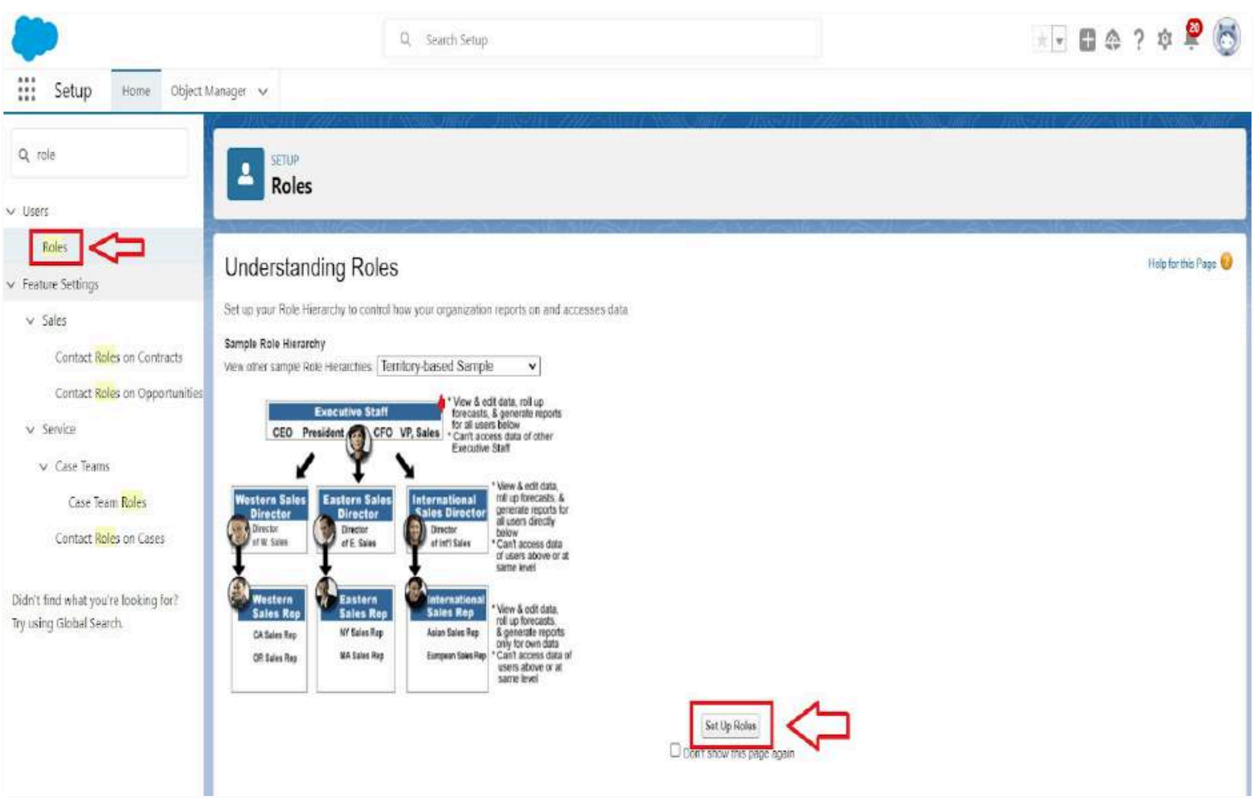
To create a role follow these below steps :

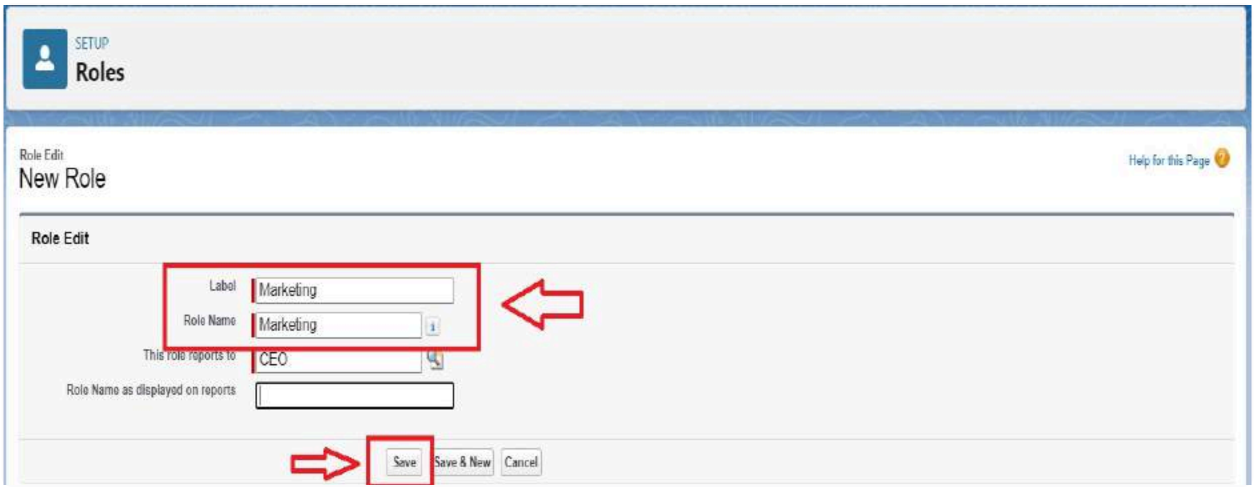
**Step 1 :** Go to quick find > Search for Roles > click on set up roles.

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

**Step 3 :** Give Label as “Marketing” and Role name gets auto populated.

**Step 4 :** Then click on Save.




## Role 2 : " Receptionist Role "

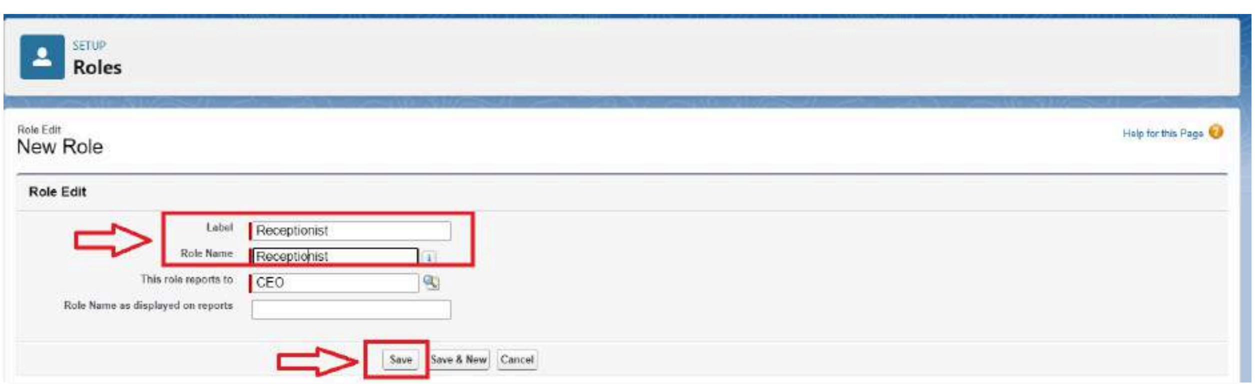
To create a role follow these below steps :

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

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

**Step 3 :** Give Label as “Receptionist” and Role name gets auto populated.

**Step 4 :** Then click on Save.



# Task 10 : Creating Users

## USER 1 : " Sandeep Gujja "

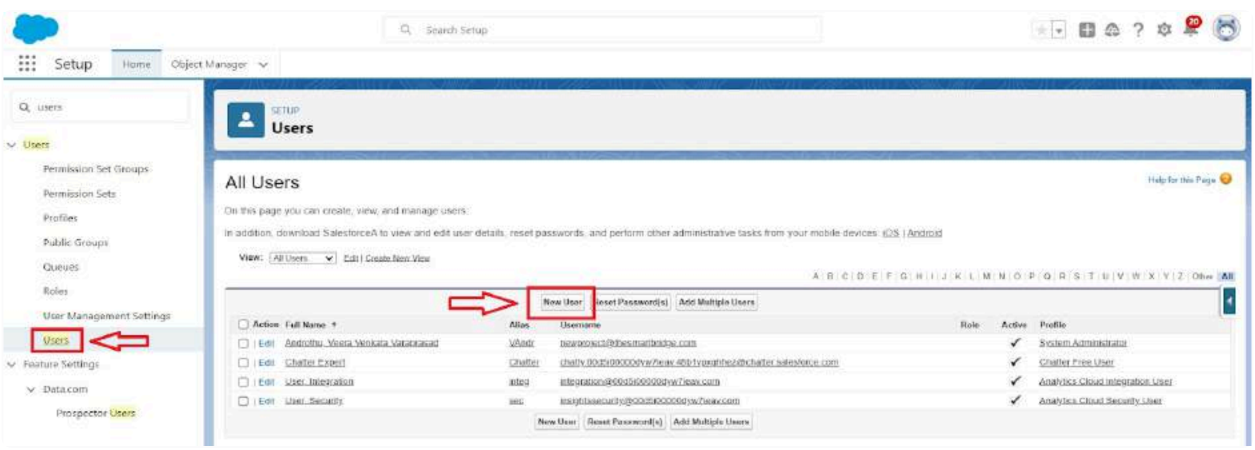
To create a User follow these below steps :

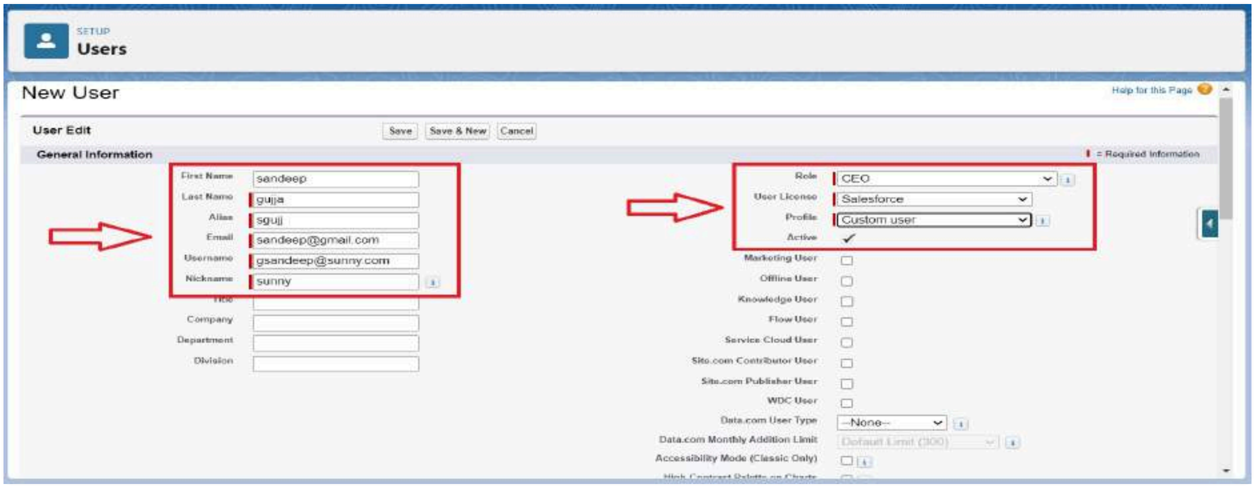
**Step 1 :** Go to setup > type users in quick find box > select users > click New user.

**Step 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

**Step 3 :** Click on save.



## USER 2 : " Abhilash Garapati "

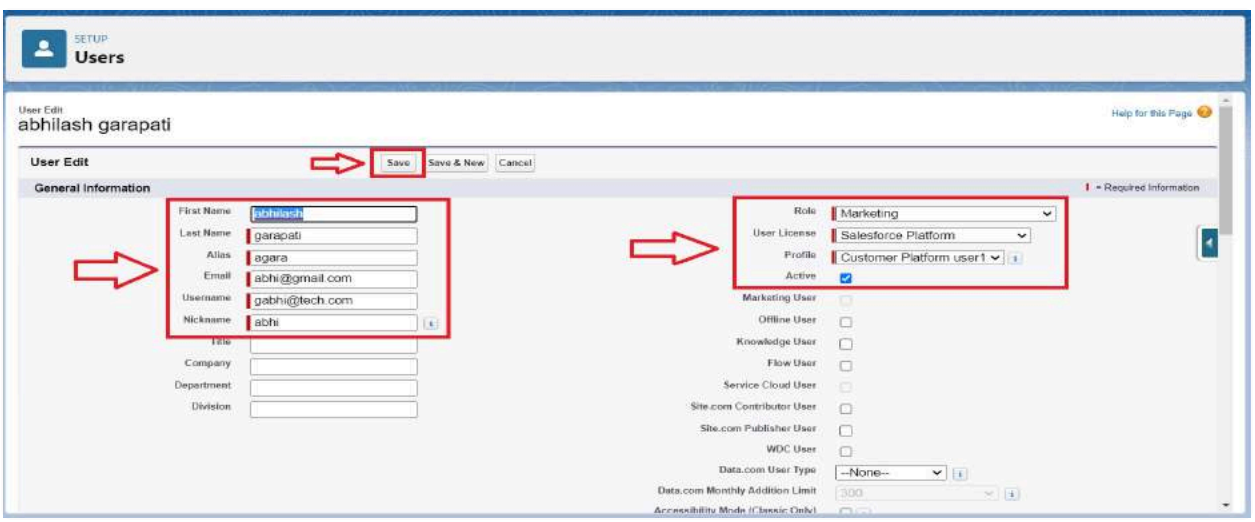
To create a User follow these below steps :

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

**Step 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

**Step 3 :** Click on save



## **USER 3 :** Create Another User

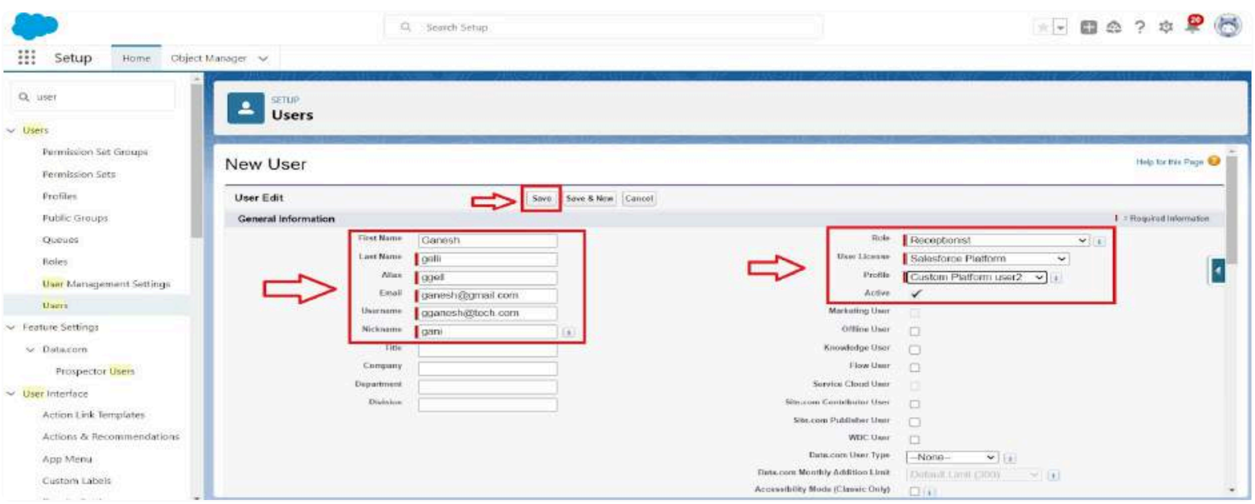
To create a User follow these below steps :

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

**Step 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

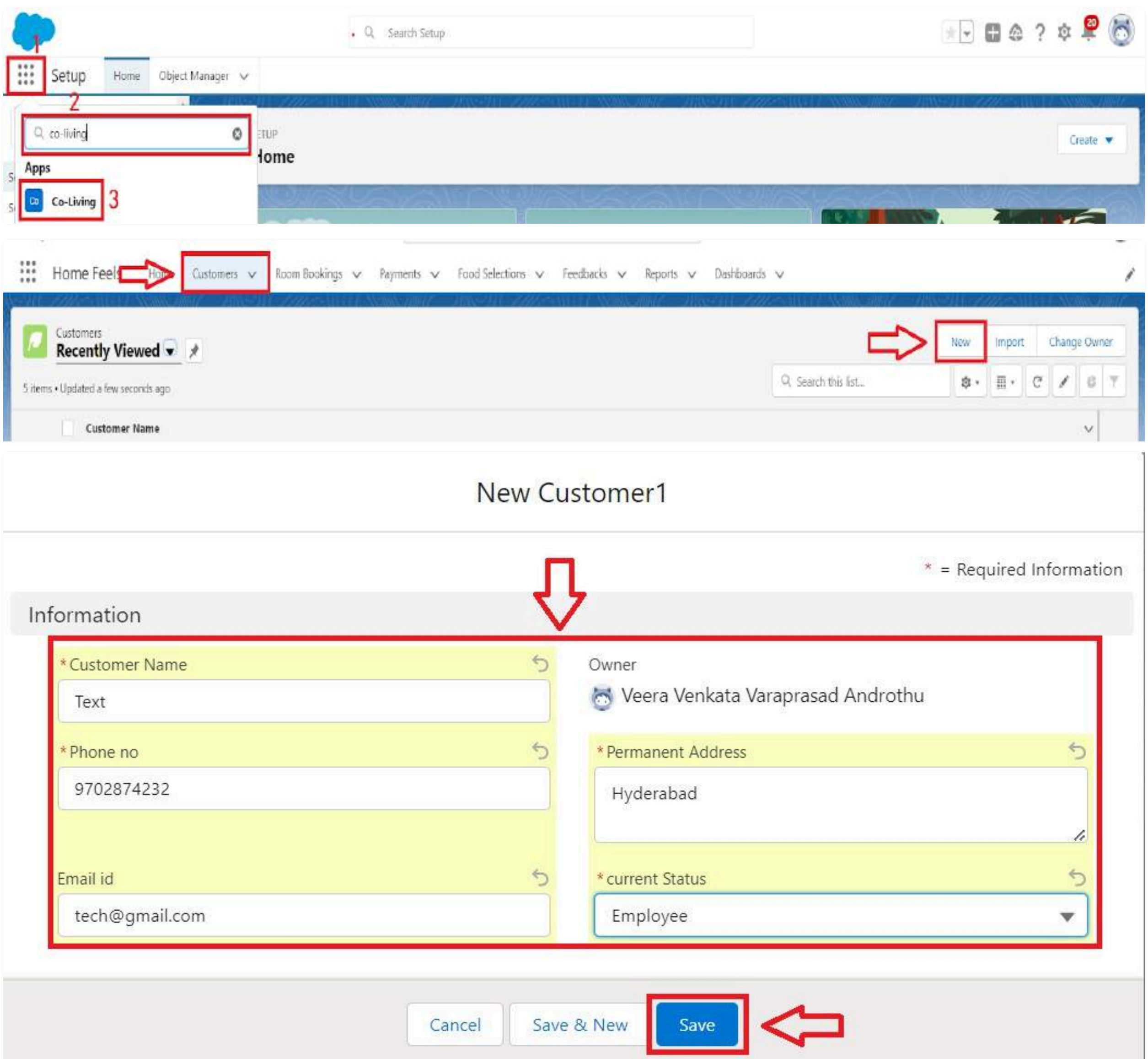
**Step 3 :** Save



# Task 11 : User Adoption

## Record 1. Creating record" Customers "

**Step 1 :** Click on App Launcher on the left side of the screen.
**Step 2 :** Search Home Feels & click on it.
**Step 3 :** Click on the Customers Tab.
**Step 4 :** Click new and fill details & Save



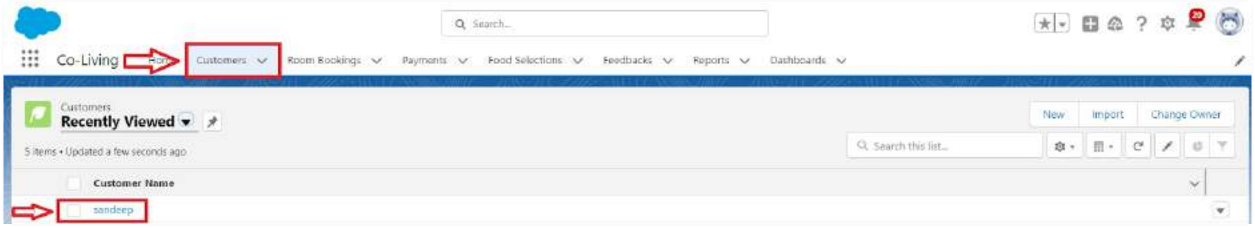
## Record 2. Viewing Record " Customers "

**Step 1 :** Click on App Launcher on the left side of the screen.

**Step 2 :** Search Home Feels & click on it.

**Step 3 :** Click on Customer Tab.

**Step 4 :** Click on any record name. you can see the details of the Customer.




## 3. Deleting Record " Customers "

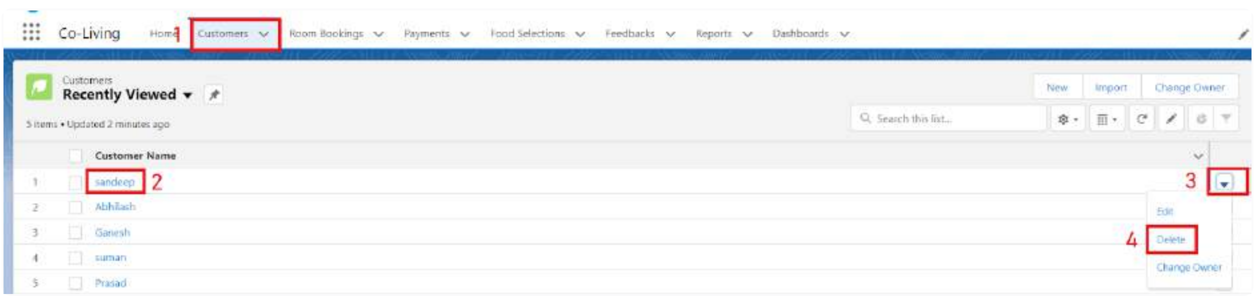
**Step 1 :** Click on App Launcher on the left side of the screen.

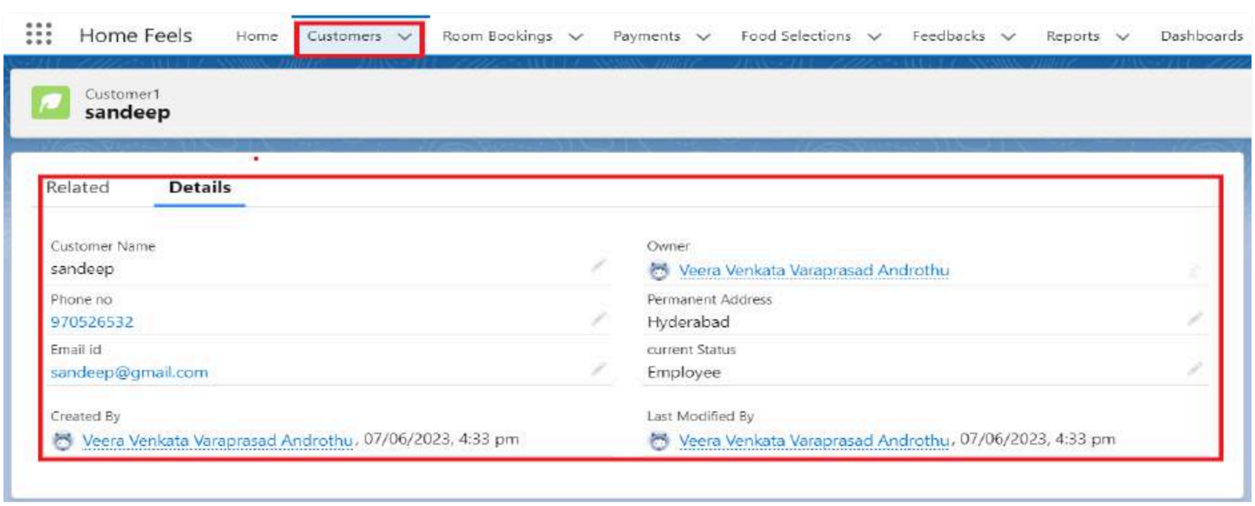
**Step 2 :** Search Home Feels & click on it.

**Step 3 :** Click on the Customers Tab.

**Step 4 :** Click on Arrow at right hand side on that Particular record.

**Step 5 :** Click delete and delete again.



# Task 12 : Reports Creation

## Report 1 : " Customers with Room Bookings with Total Rooms "

**Step 1 :** Go to the app > click on the reports tab

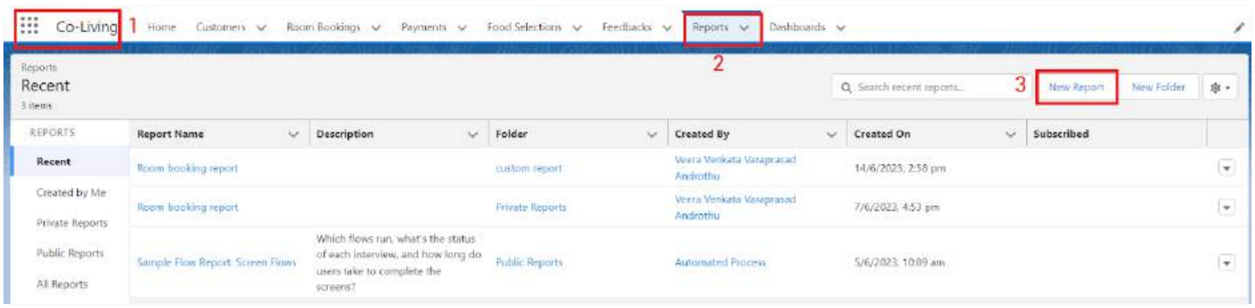
**Step 2 :** Click New Report.

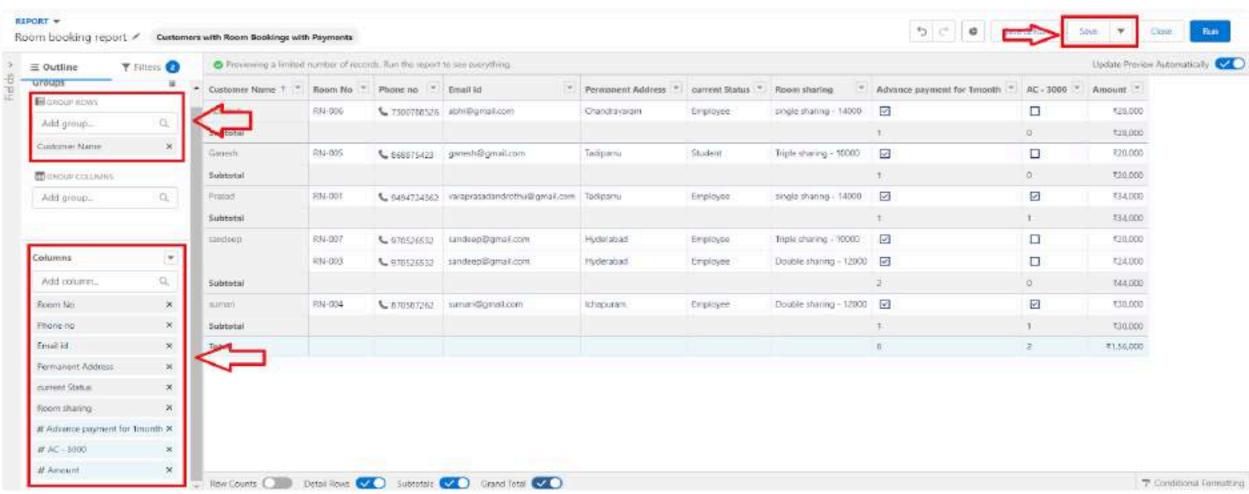
**Step 3 :** Select report type from category or from report type panel or from search panel “Customers with Room Bookings with Total Rooms ” > click on start report.

**Step 4 :** Customize your report

**Step 5 :** Add fields from left pane as shown below

**Step 6 :** Save or run it.




## Report 2 : " Customer With Room Booking With Payments "

**Step 1 :** Go to the app > click on the reports tab

**Step 2 :** Click New Report.

**Step 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.

**Step 4 :** Customize your report

**Step 5 :** Add fields from left pane as shown Above

**Step 6 :** Save or run it.

# Task 13 : Dashboard Creation

## Dashboard 1 : " Custom Dashboard "

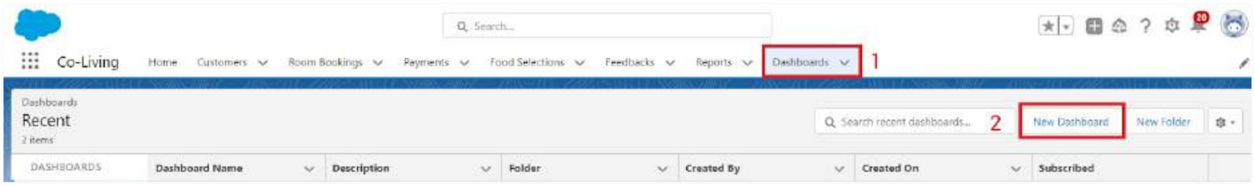
**Step 1 :** Go to the app > click on the Dashboard tabs and click on new Dashboard

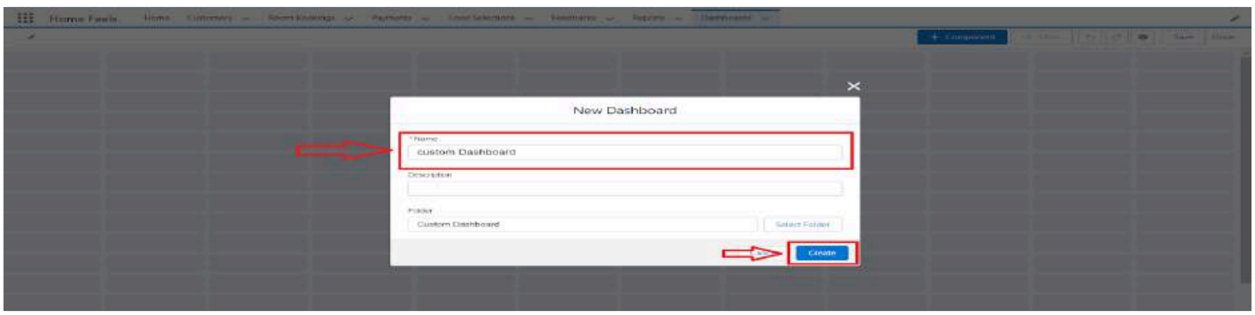
**Step 2 :** Give a Name and click on Create.

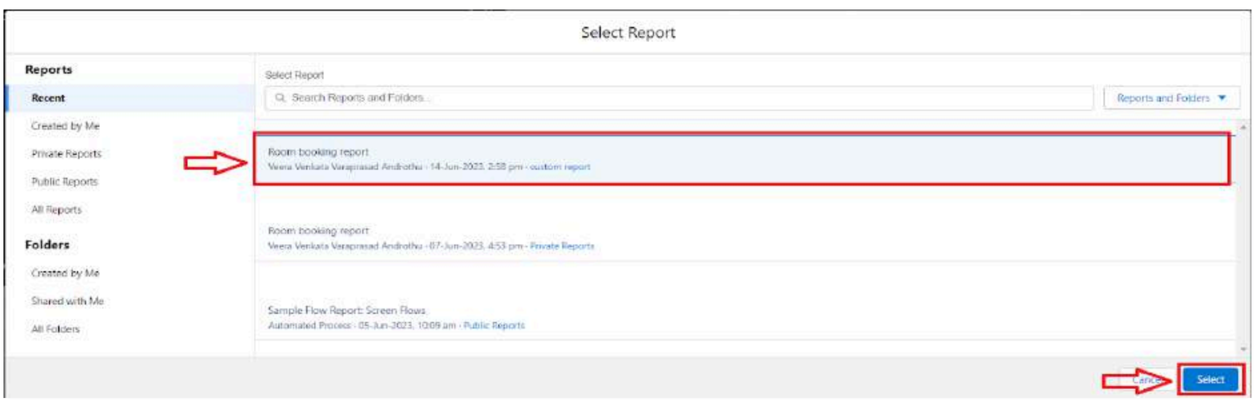
**Step 3 :** Select add component.

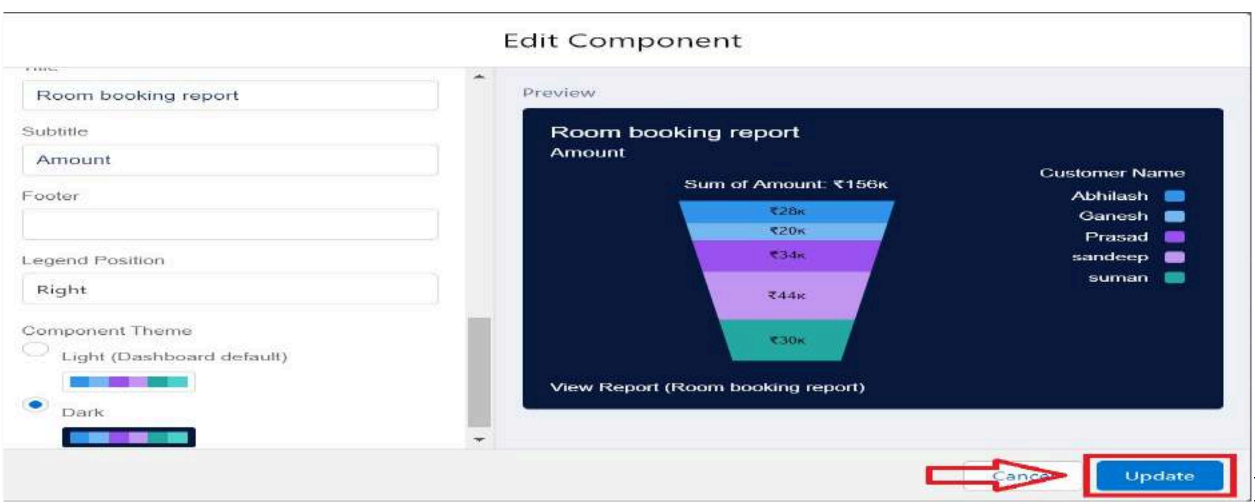
**Step 4 :** Select a Report Customer with Room Booking and click on select.

**Step 5 :** Click Add then click on Save and then click on Done.




**Dashboard**

## Dashboard 2 : Custom Dashboard 1

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

**Step 2 :** Give a Name and click on Create.

**Step 3 :** Select add component.

**Step 4 :** Select a Report Customer with Room Booking with Payments and click on select.

**Step 5 :** Click Add then click on Save and then click on Done.

# Task 14 : Creating A Flow

To Create A Flow Follow These Steps :

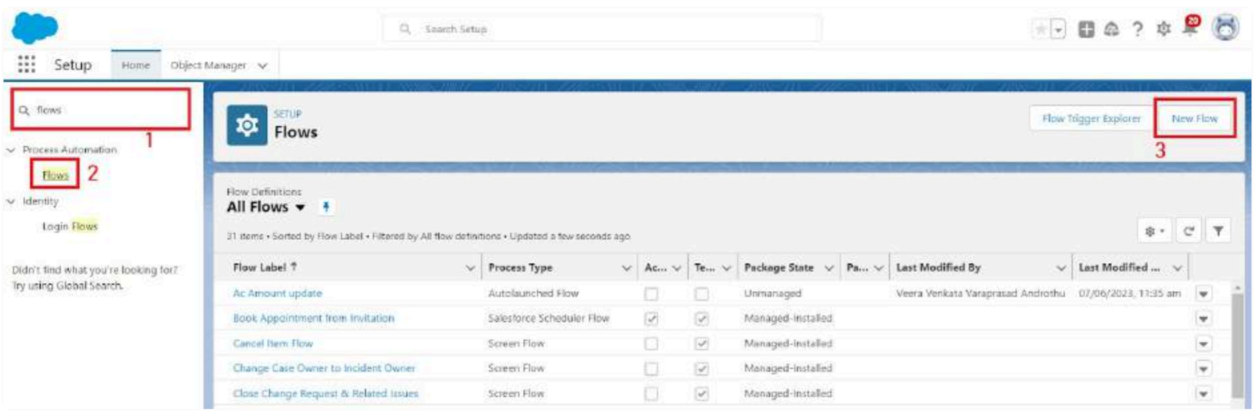
**Step 1 :** Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.

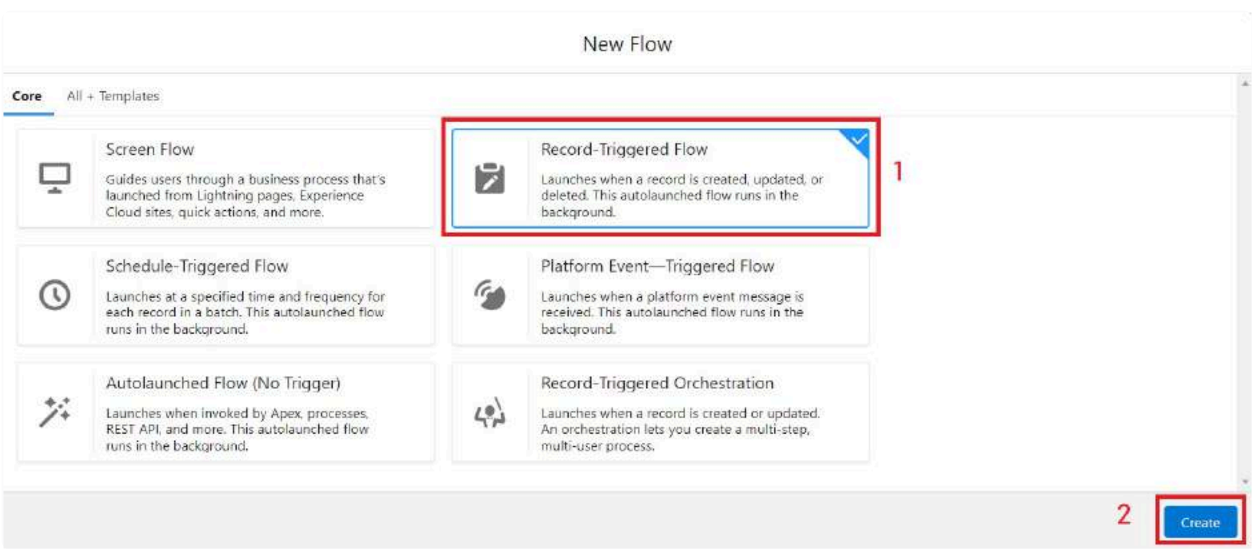
**Step 2 :** Select the Record-triggered flow and Click on Create.

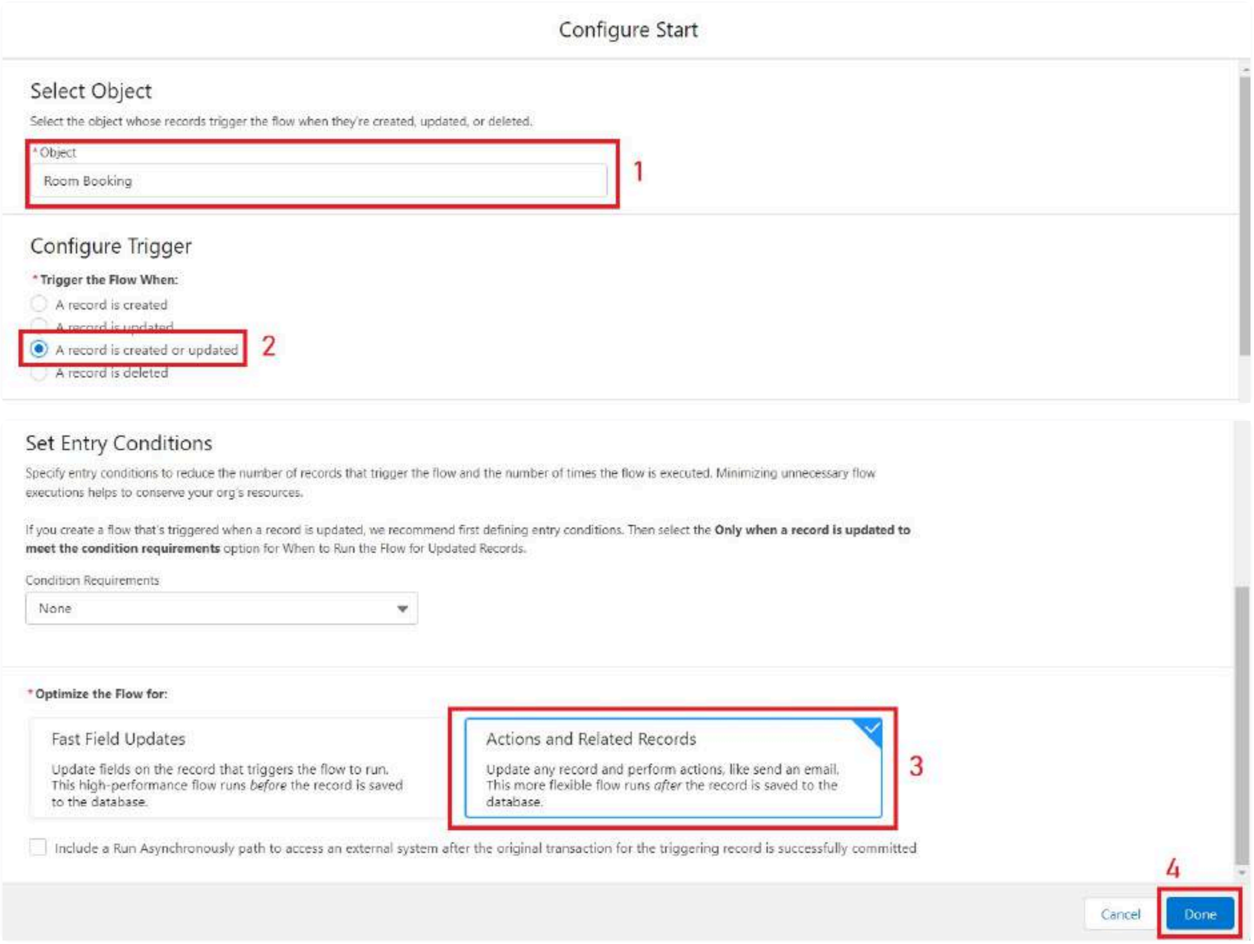
**Step 3 :** Select the Object as a Room Booking in the Drop down list.

**Step 4 :** Select the Trigger Flow when: “A record is Created or Updated”.

**Step 5 :** Select the Optimize the flow for: “Actions and Related Records” and Click on Done.

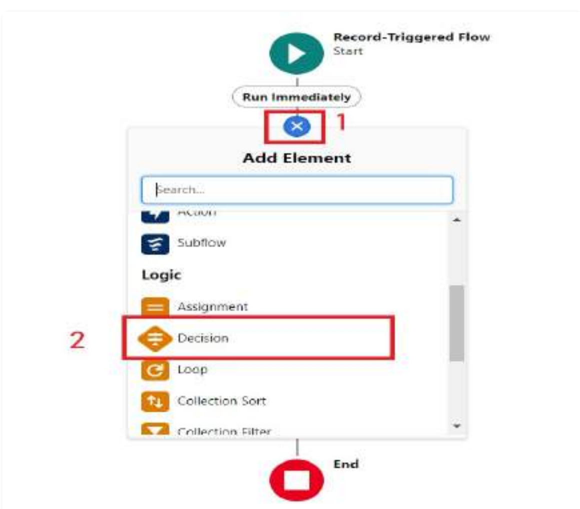





## Adding Elements to the Decision:

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




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

# Element 1 : Single Sharing

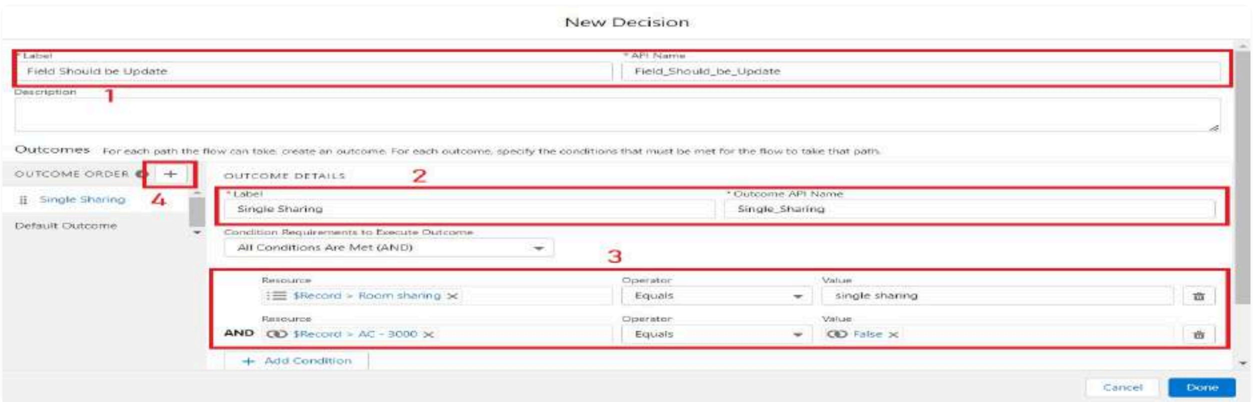
**Step 1 :** Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Single sharing.

**Step 2 :** Click on "Add Condition"

- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select False.

**Step 3 :** Click on "+" Symbol In the Outcome Order.




# Element 2 : Double Sharing

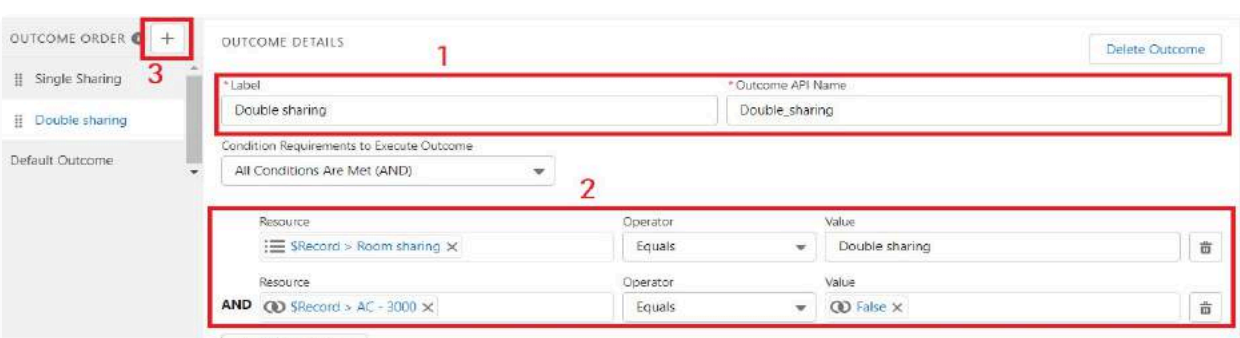
**Step 1 :** Enter the Outcome Details Label: Double sharing, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Double sharing.

**Step 2 :** Click on "Add Condition"

- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select False.

**Step 3 :** Click on "+" Symbol In the Outcome Order.



### Element 3 : Triple Sharing

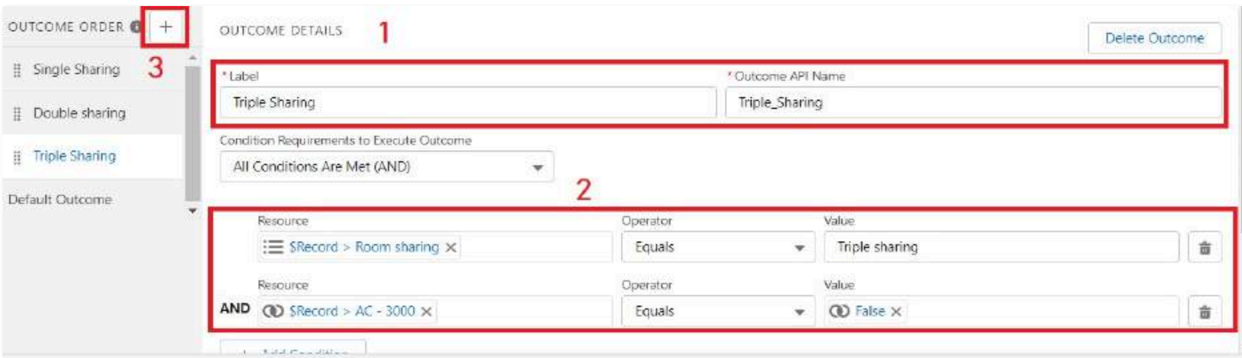
**Step 1 :** Enter the Outcome Details Label: Triple sharing, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Triple sharing.

**Step 2 :** Click on "Add Condition"

- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select False.

**Step 3 :** Click on "+" Symbol In the Outcome Order.




### Element 4 : Single Ac

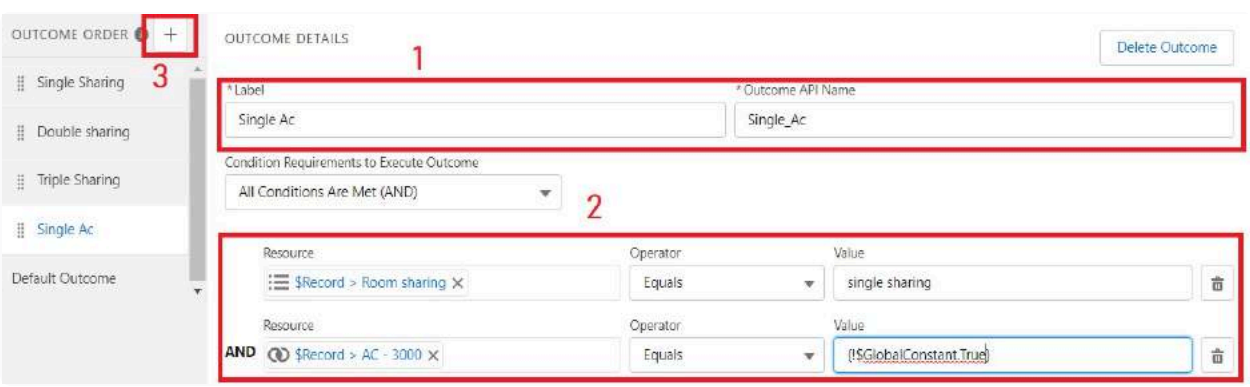
**Step 1 :** Enter the Outcome Details Label: Single Ac, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Single sharing.

**Step 2 :** Click on "Add Condition"

- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select True.

**Step 3 :** Click on "+" Symbol In the Outcome Order.



## Element 5 : Double Ac

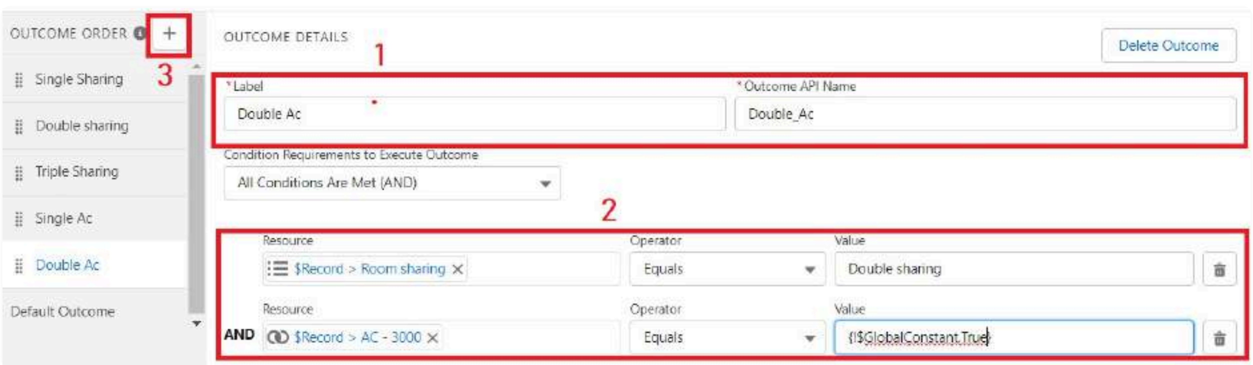
**Step 1 :** Enter the Outcome Details Label: Double Ac, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Double sharing.

**Step 1 :** Click on “Add Condition”

- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select True.

**Step 1 :** Click on “+” Symbol In the Outcome Order.




## Element 6 : Triple Ac

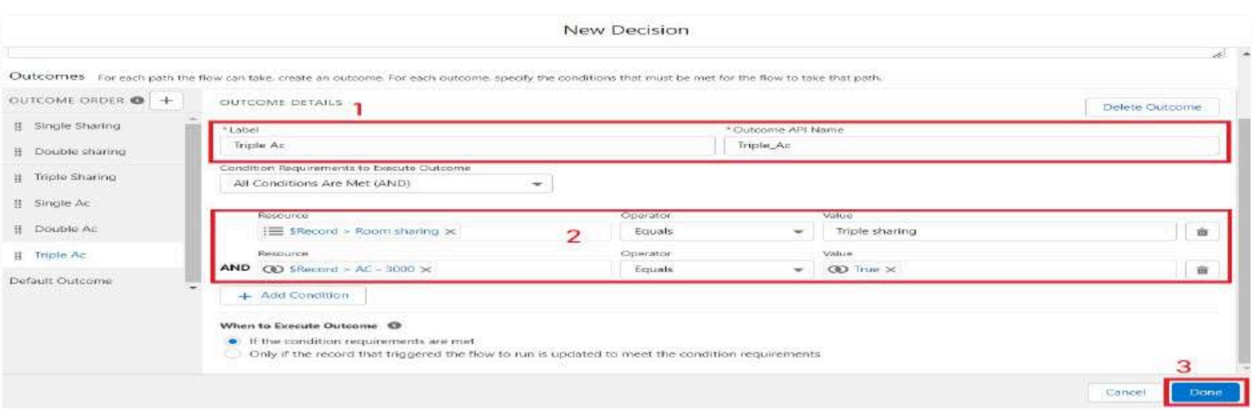
**Step 1 :** Enter the Outcome Details Label: Triple Ac, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Triple sharing.

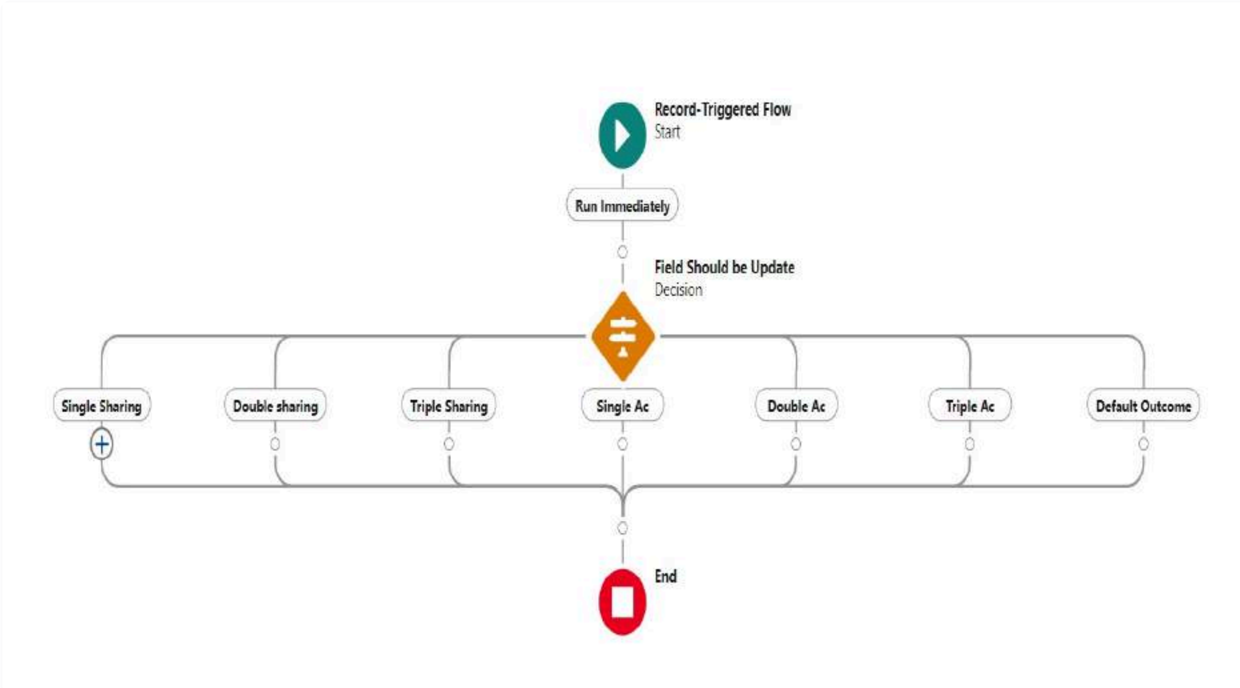
**Step 1 :** Click on “Add Condition”

- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select True.

**Step 1 :** Click on Done.

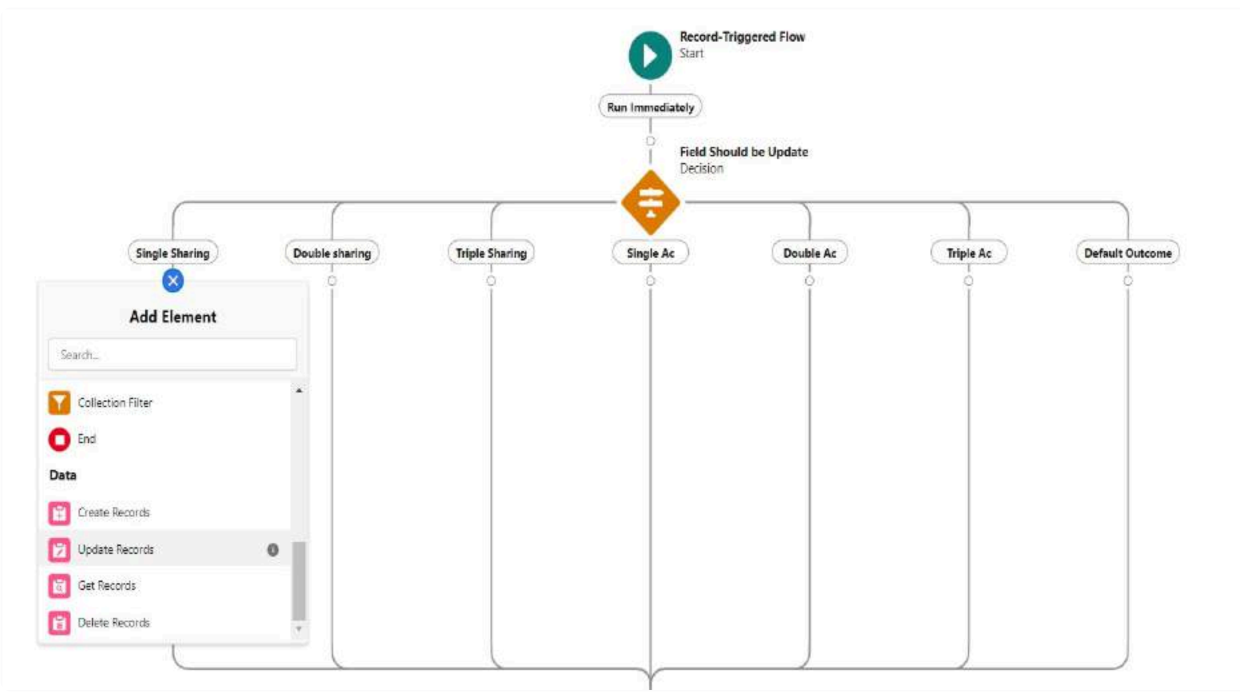


- This is how the Final representation of Flow should look like :




## Updating Records :

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

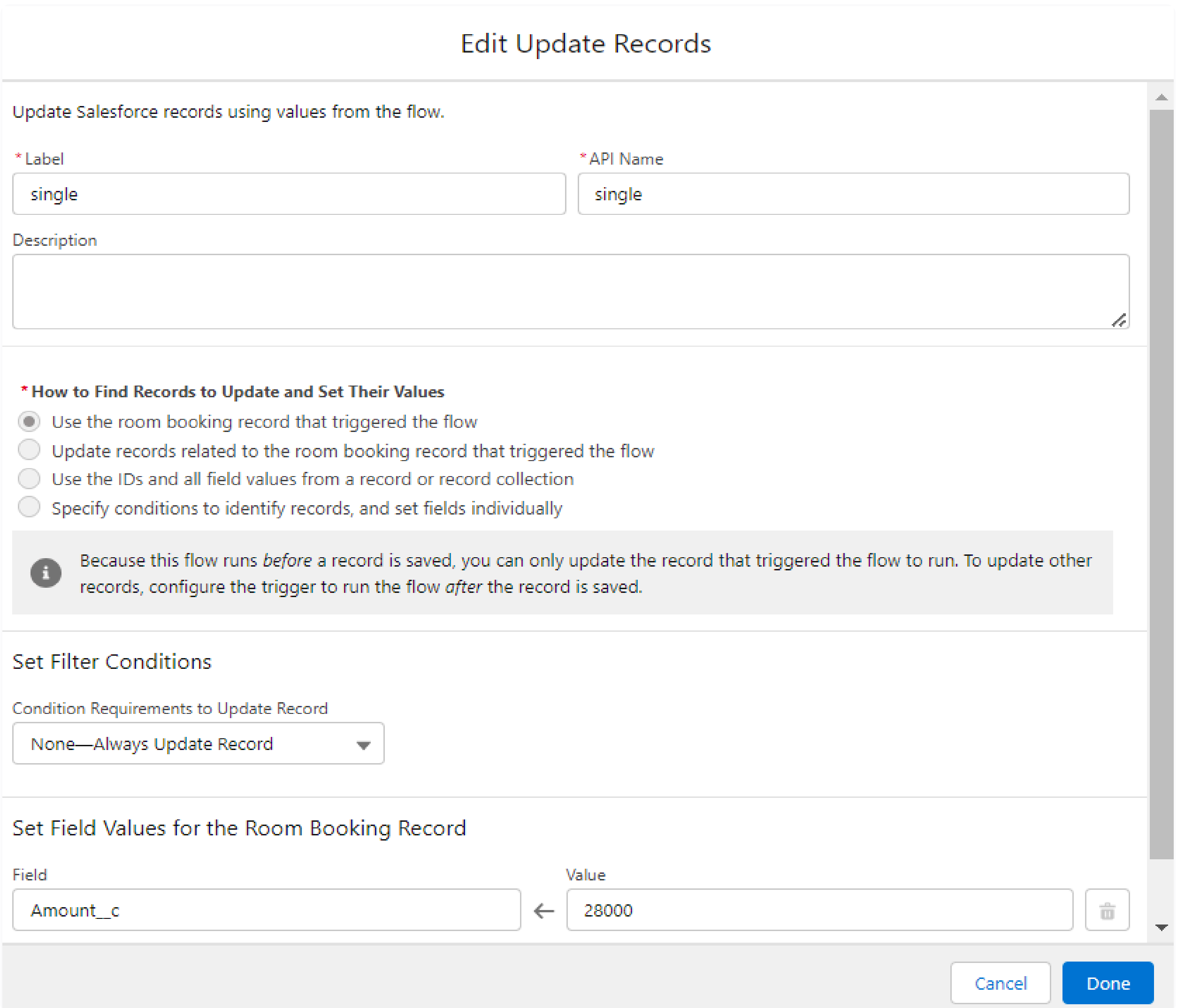


## Update 1 : " Single "

**Step 1 :** 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.

**Step 2 :** Click on Done.

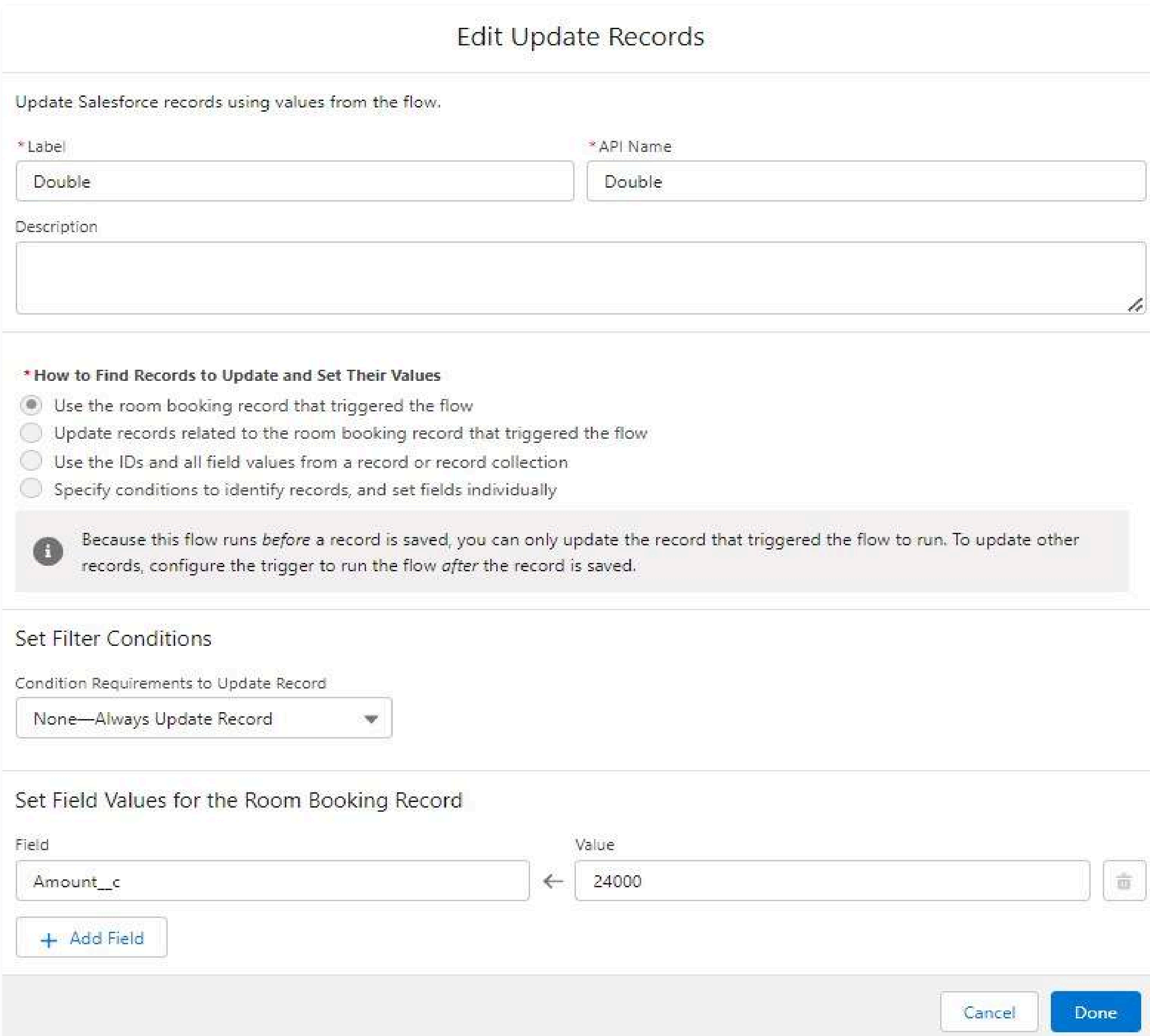


## Update 2 : " Double "

**Step 1 :** 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.

**Step 2 :** Click on Done.

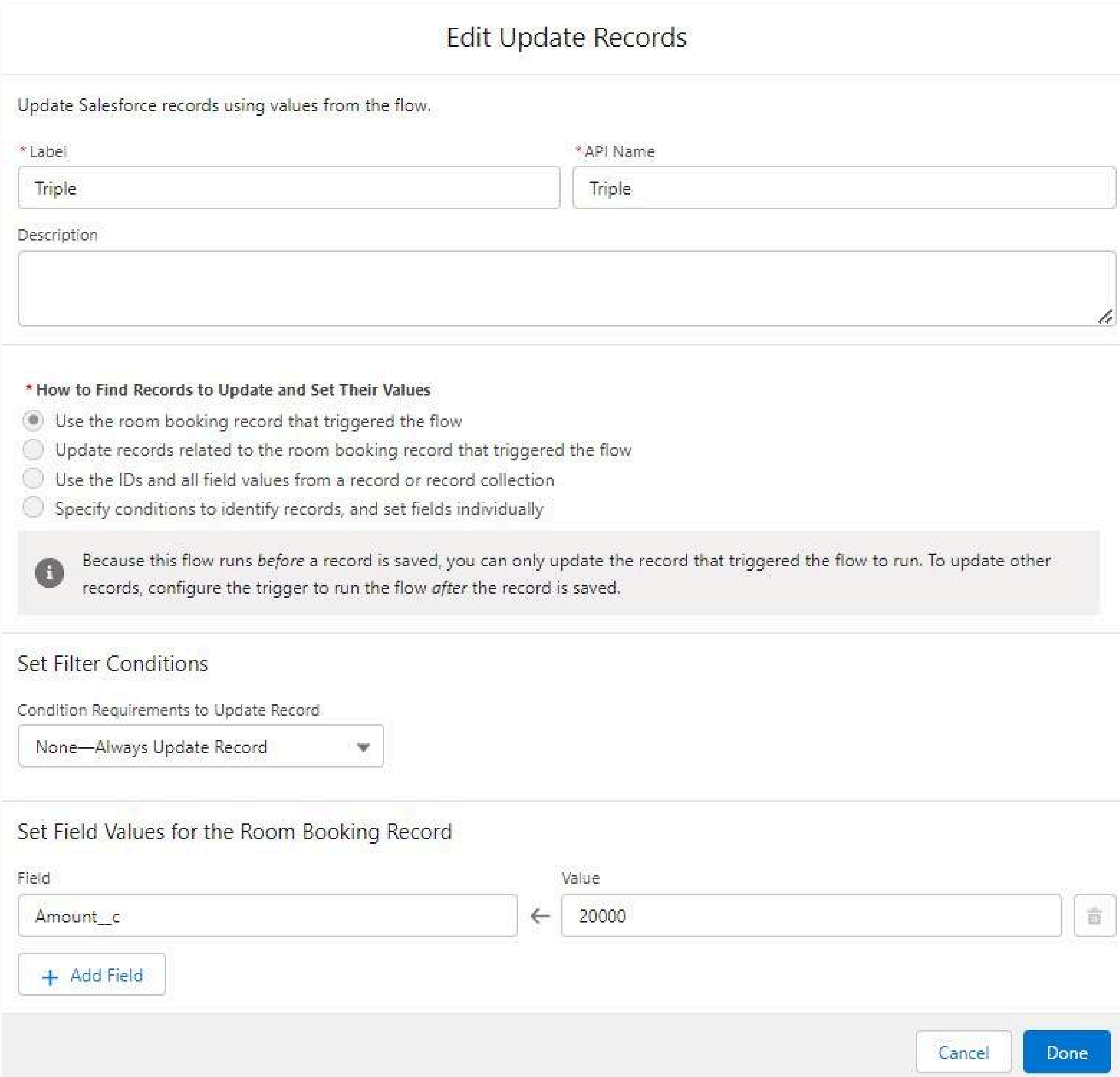


## Update 3 : " Triple "

**Step 1 :** 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.

**Step 2 :** Click on Done.

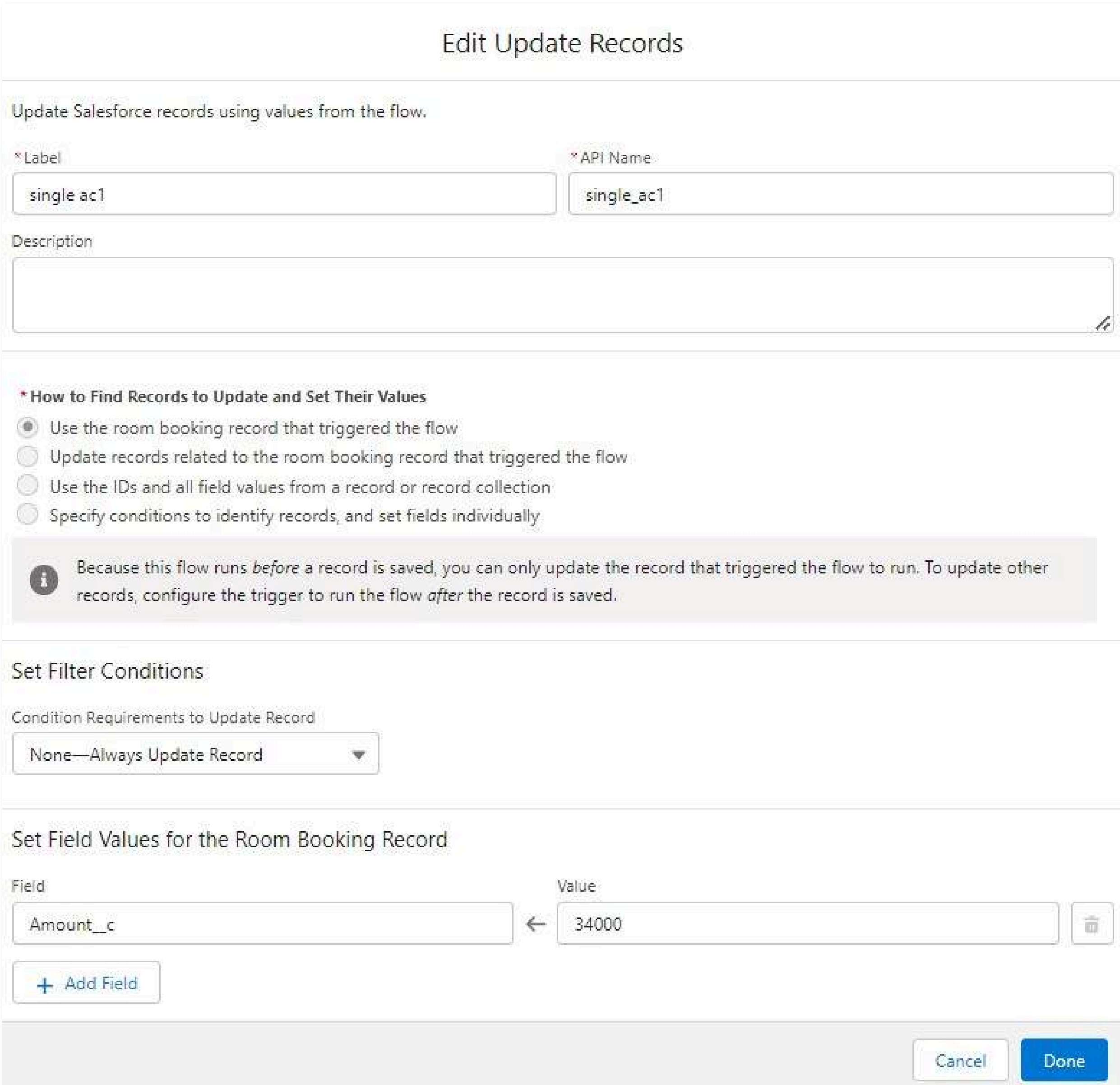


## Update 4 : " Single Ac 1"

**Step 1 :** 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.

**Step 2 :** Click on Done.

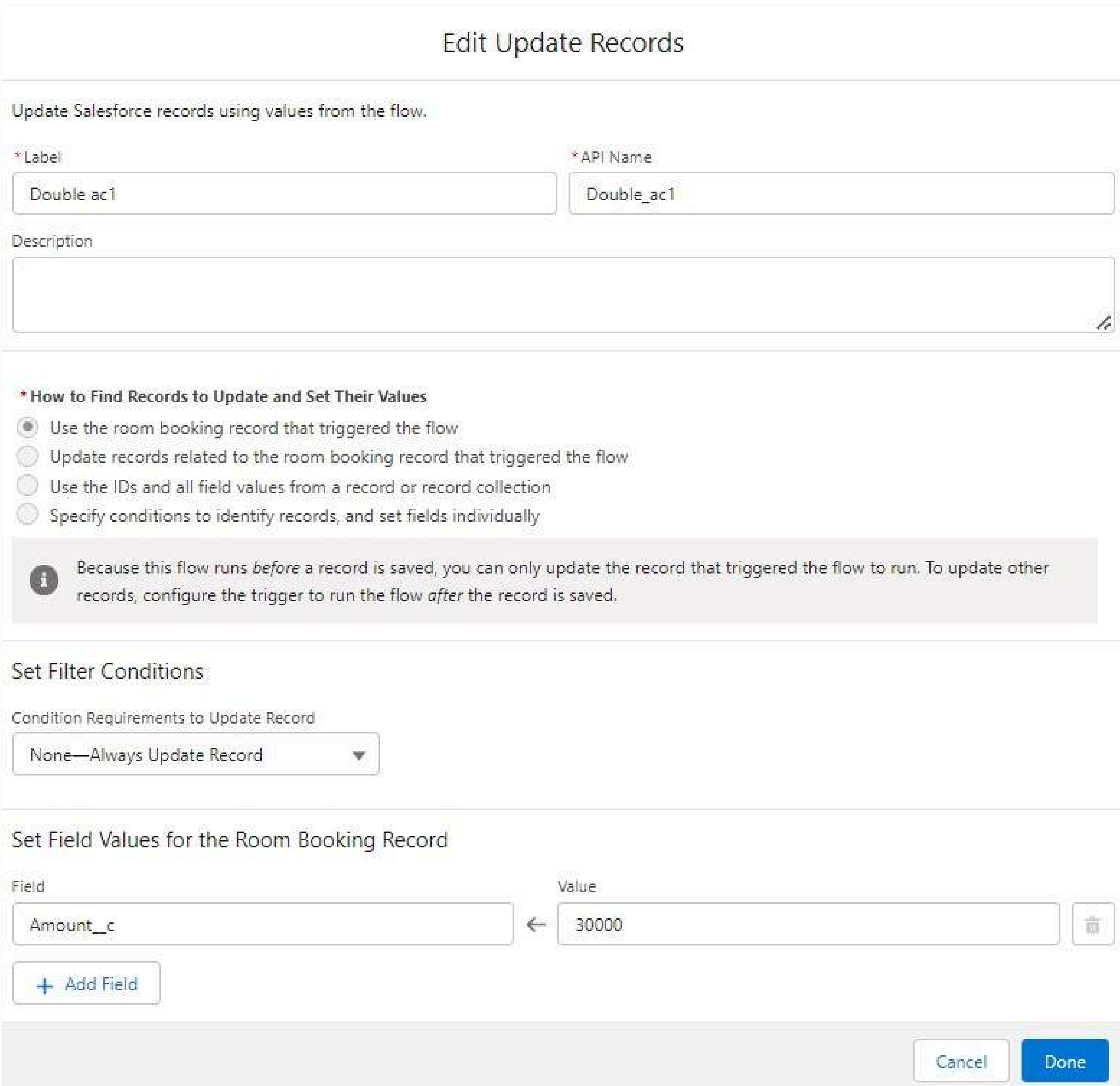


## Update 5 : " Double Ac 1 "

**Step 1 :** 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.

**Step 2 :** Click on Done.

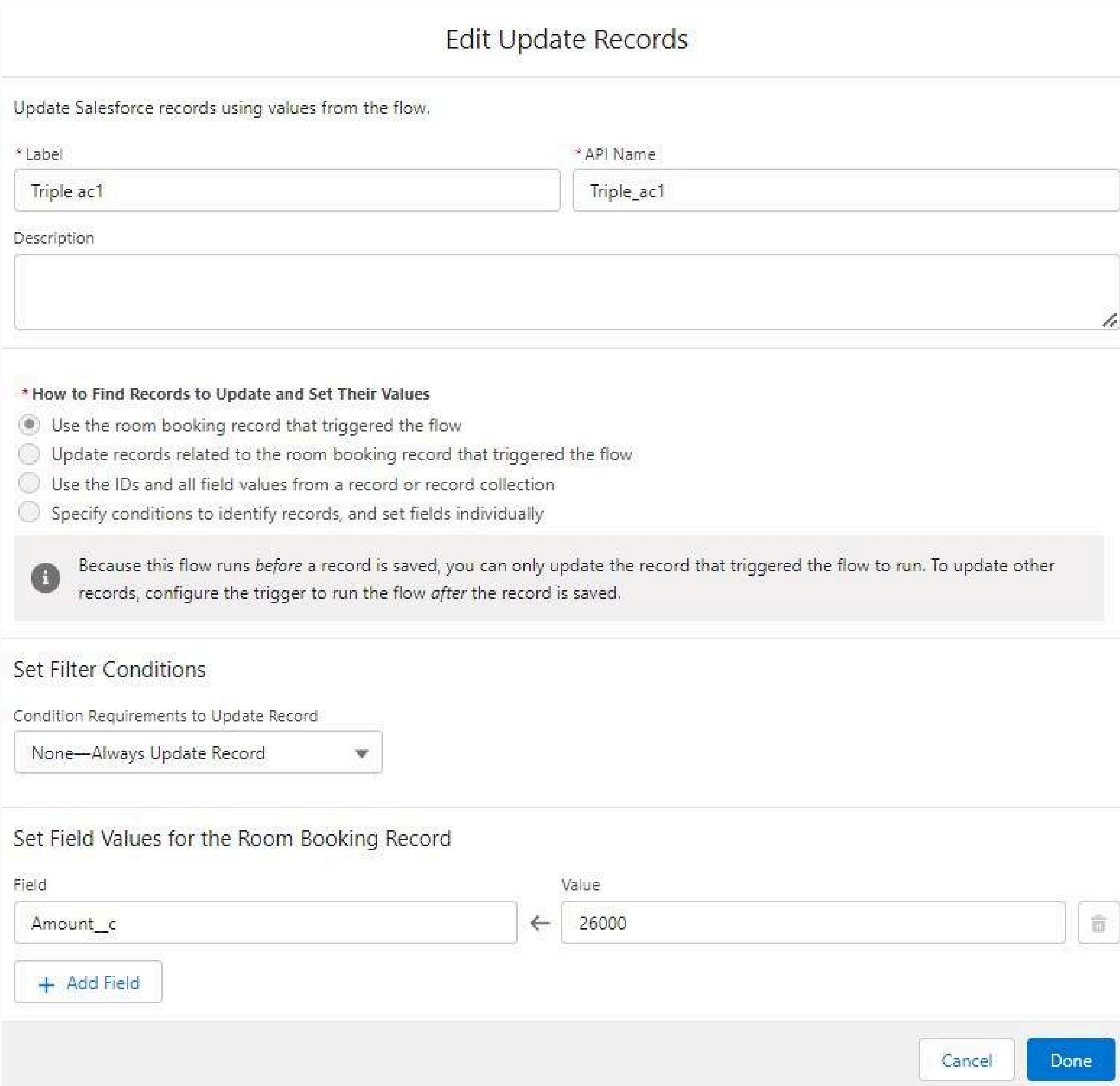


## Update 6 : " Triple Ac 1 "

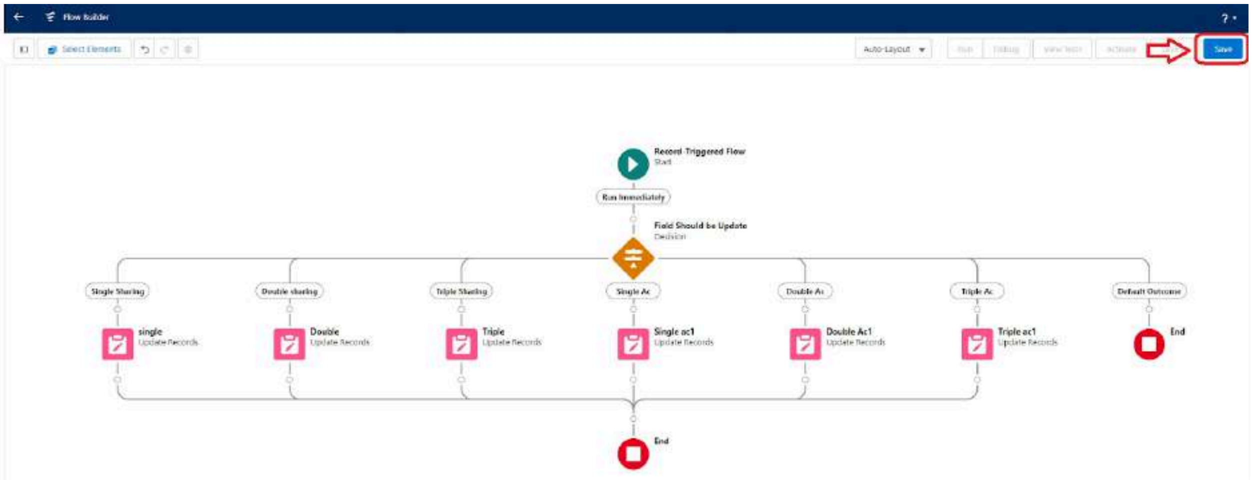
**Step 1 :** Enter the update records details

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

**Step 2 :** Click on Done.



➤ Finally The Flow will Form like This and Click on save.



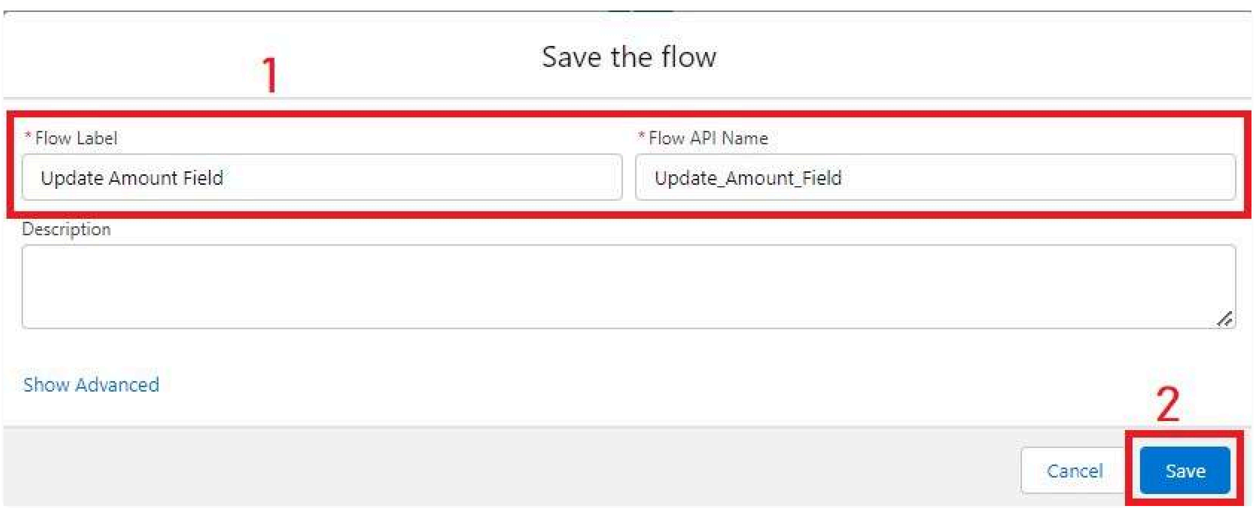

# Saving the Flow :

Follow these steps to save the Flow :

**Step 1 :** Enter the Flow Label: " Update Amount Field "

- Flow API Name: Gets Automatically Generated.

**Step 2 :** Click on Save.



# Task 15 : Testing The Flow

To Test A Flow Follow These Steps

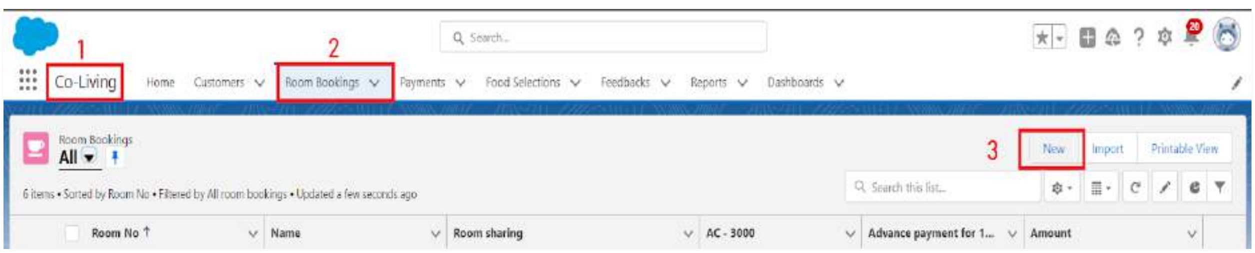
**Step 1 :** Go to App Launcher and search for Co-living and select the app

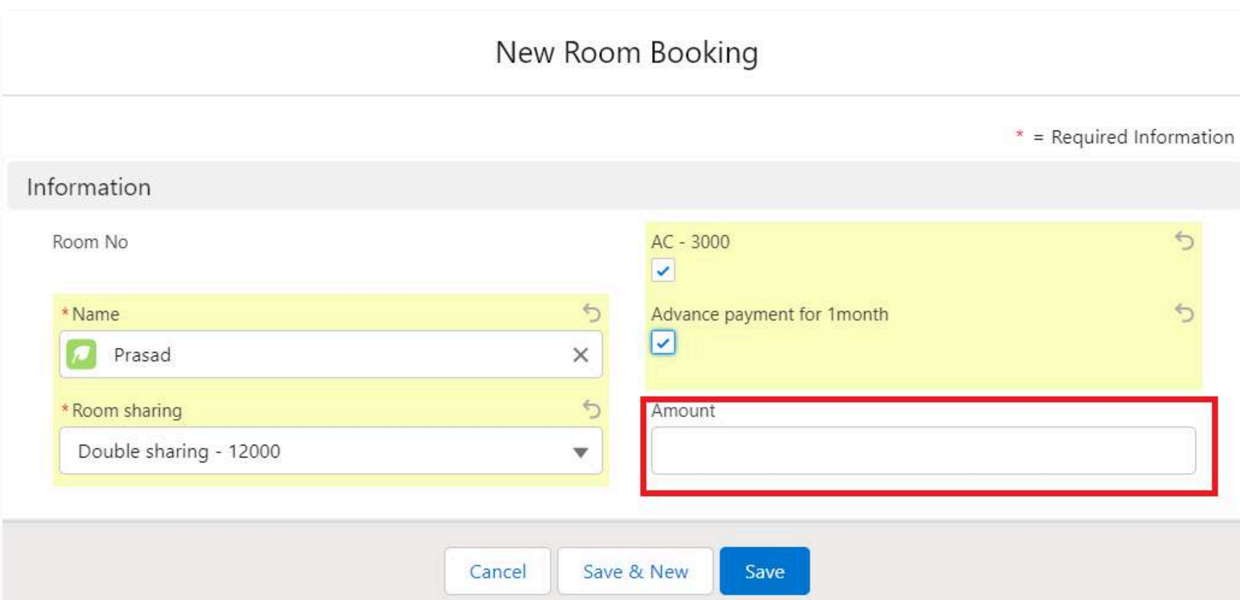
**Step 2 :** In the Co-living app click on the Room sharing tab and click on new.

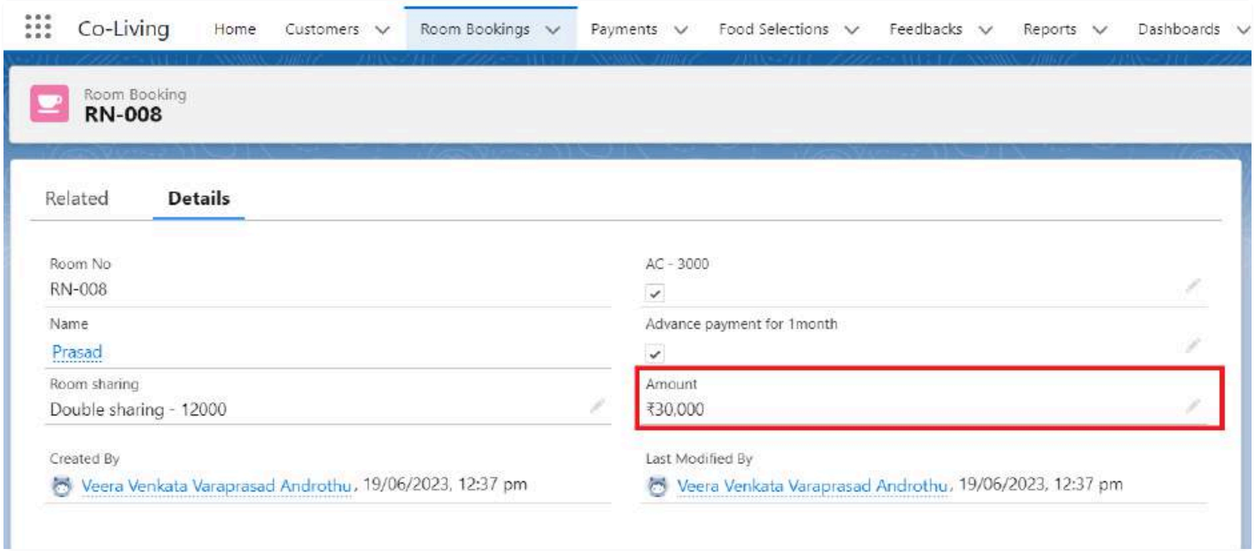
**Step 3 :** Enter the details like Name, Room sharing, Ac-3000, Advance payment for 1 Month. And the Amount field is empty before saving the record.

**Step 4 :** After saving the record the amount gets reflected in the Amount field by using the given flows.

You can take reference from the below screenshots.




So, we have observed that in amount field the value for the field is updating by it self though we didn't entered any value intially.

We can conclude that our Application for managing the Bookings for Co-living Hostel is fully functional.

--END--

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