



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..

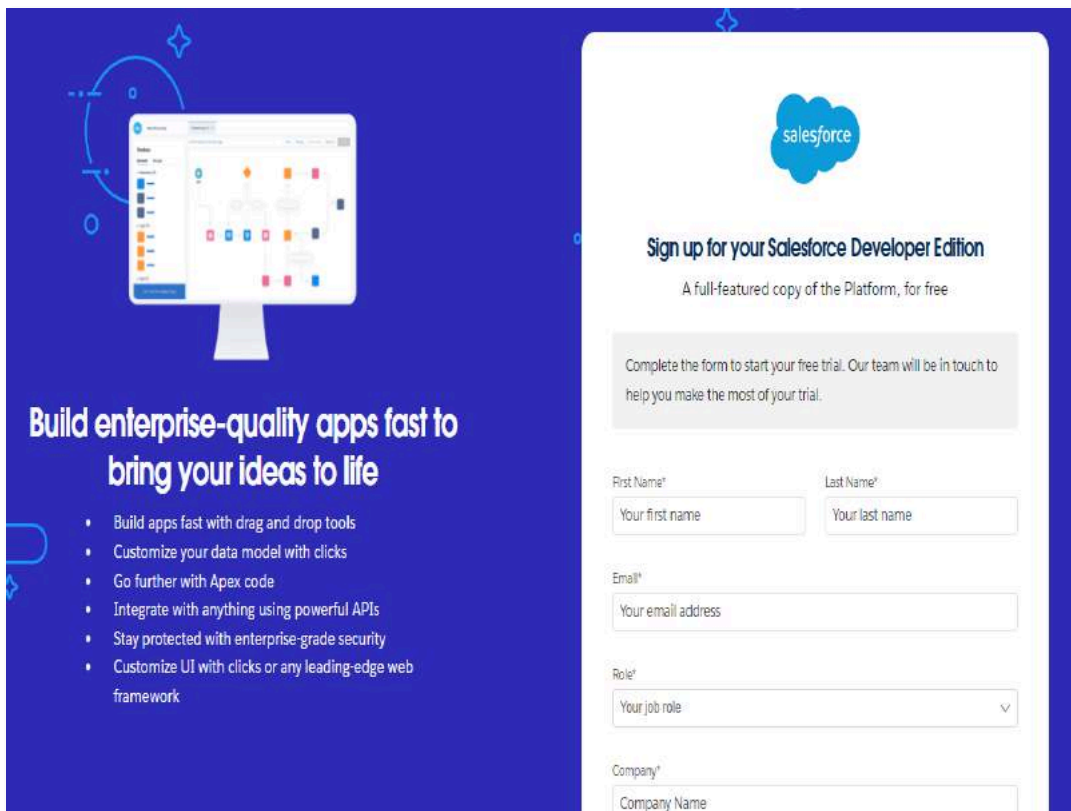
Task 1 : DEVELOPER ACCOUNT CREATION

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.

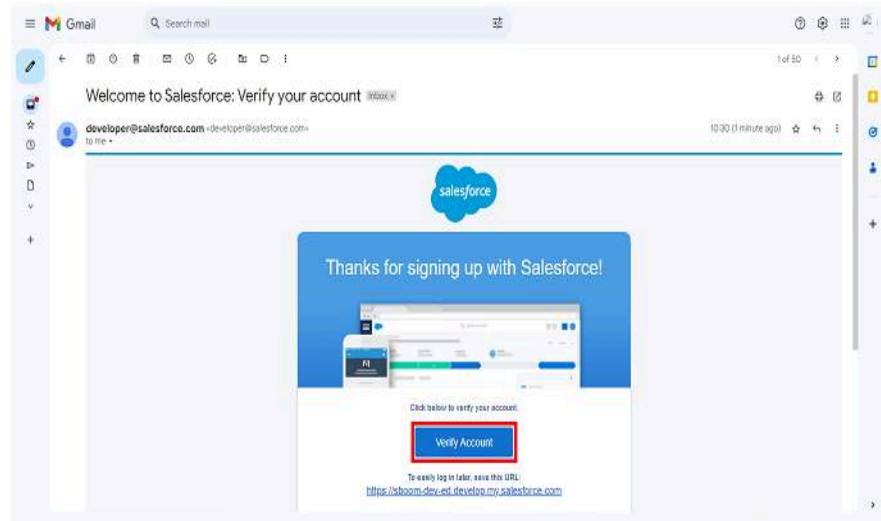
Step2 : Click on the verify account to activate your account. The email may take 5-10mins.

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.



Change Your Password

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

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

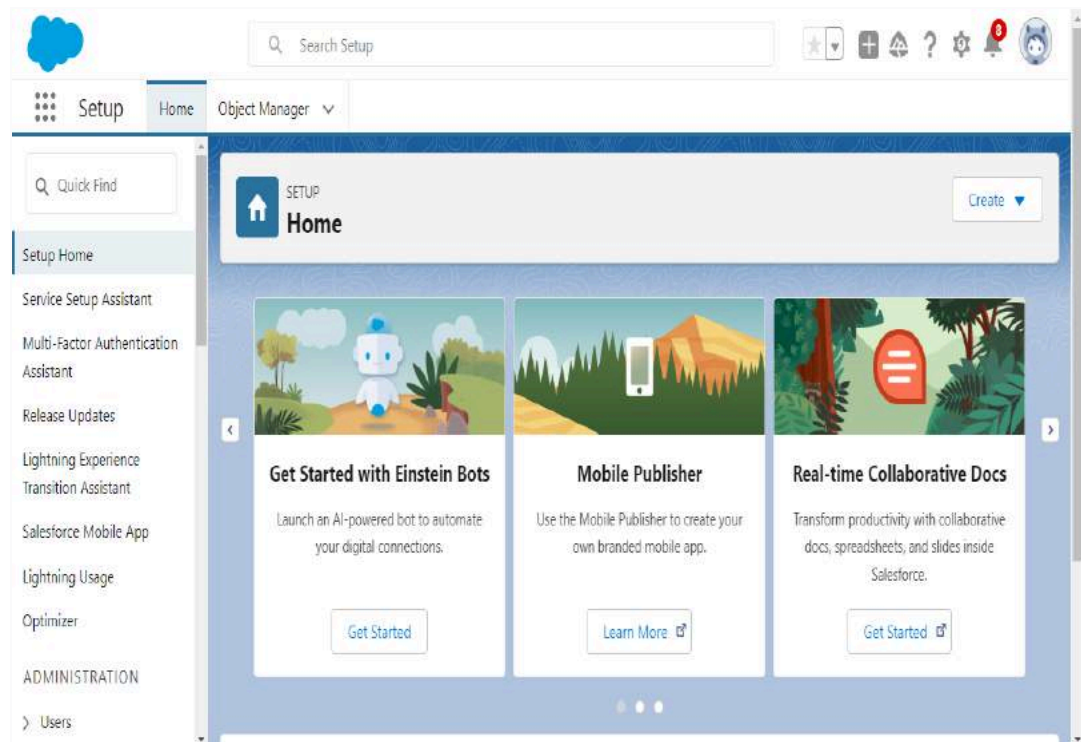
* Confirm New Password

Security Question

▼ In what city were you born?

* Answer

Change Password



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.

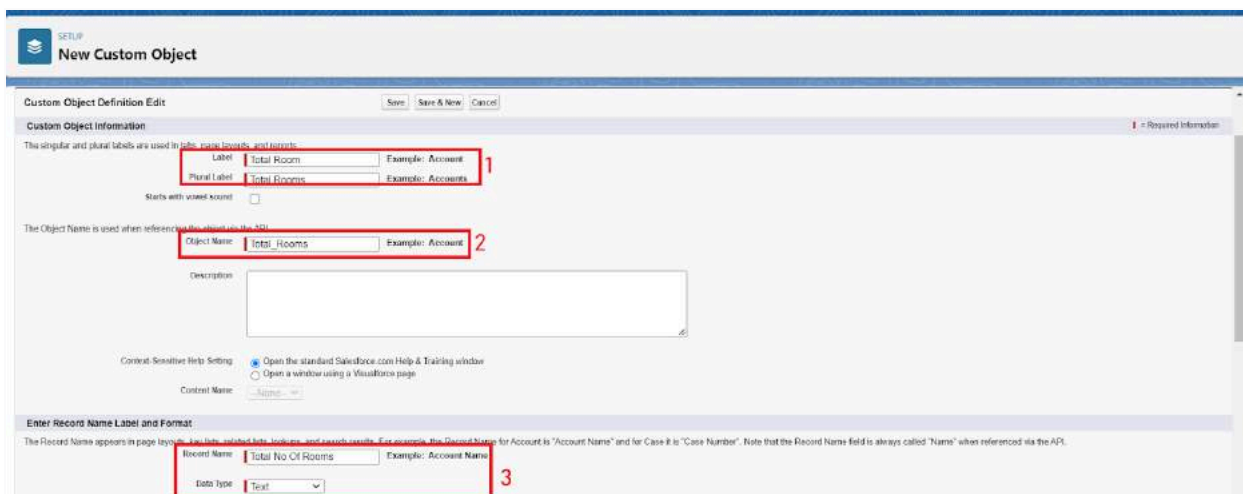
Step 8 : In the Deployment Status section, ensure Deployed is selected.

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.



Optional Features

- ☒ Allow Reports
- ☒ Allow Activities
- ☐ Track Field History
- ☐ Allow in Creative Process
- ☐ Enable Licensing

Object Classification

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

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

Deployment Status

- ☐ In Development
- ☒ Deployed

Search Status

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

- ☒ Allow Search

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

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

Buttons: Save, Save & Close, Cancel

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 :

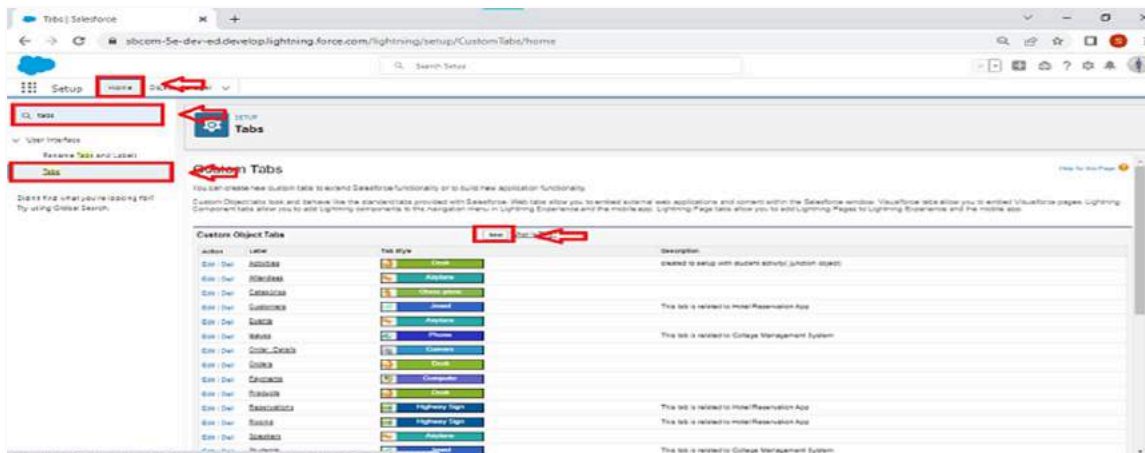
Step 1 : Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)

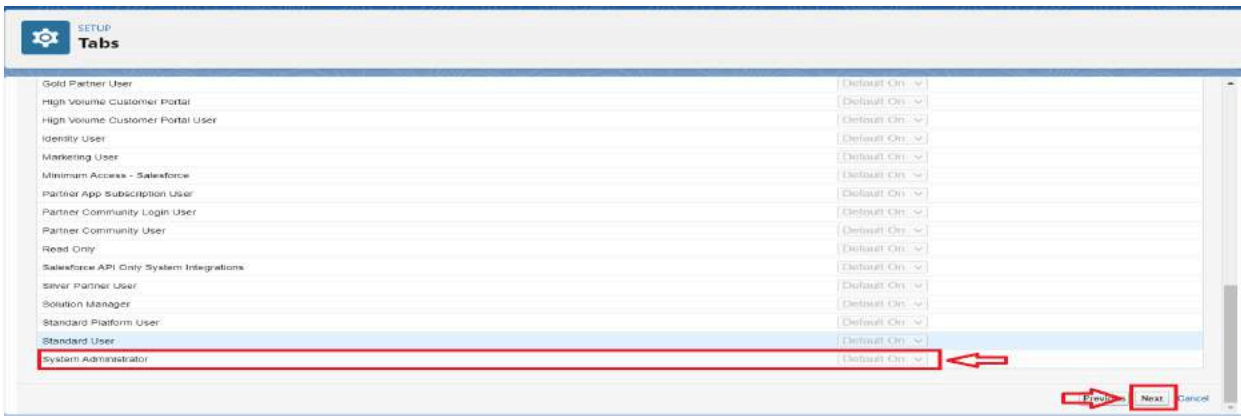
Step 2 : Select Object(Total Rooms) > Select the tab style.

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.

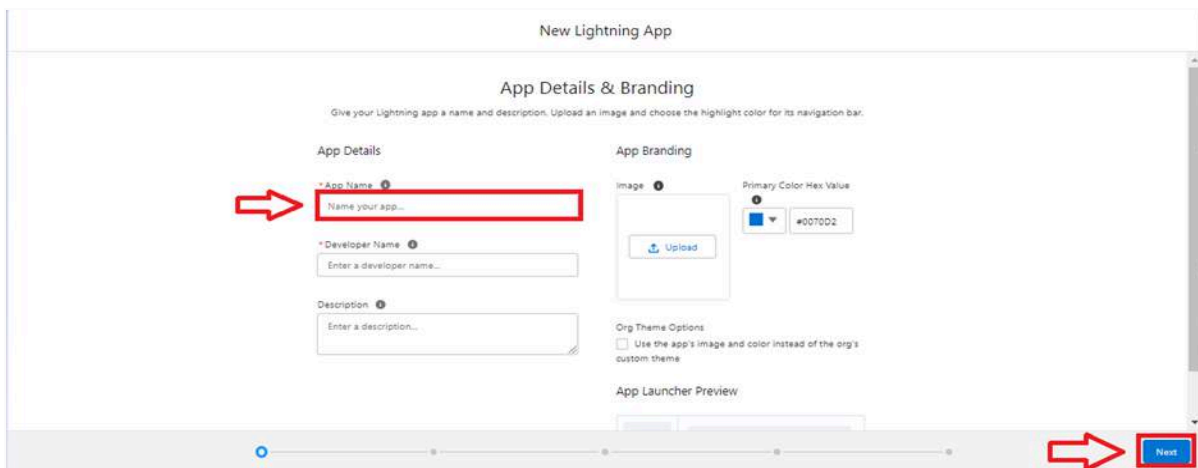
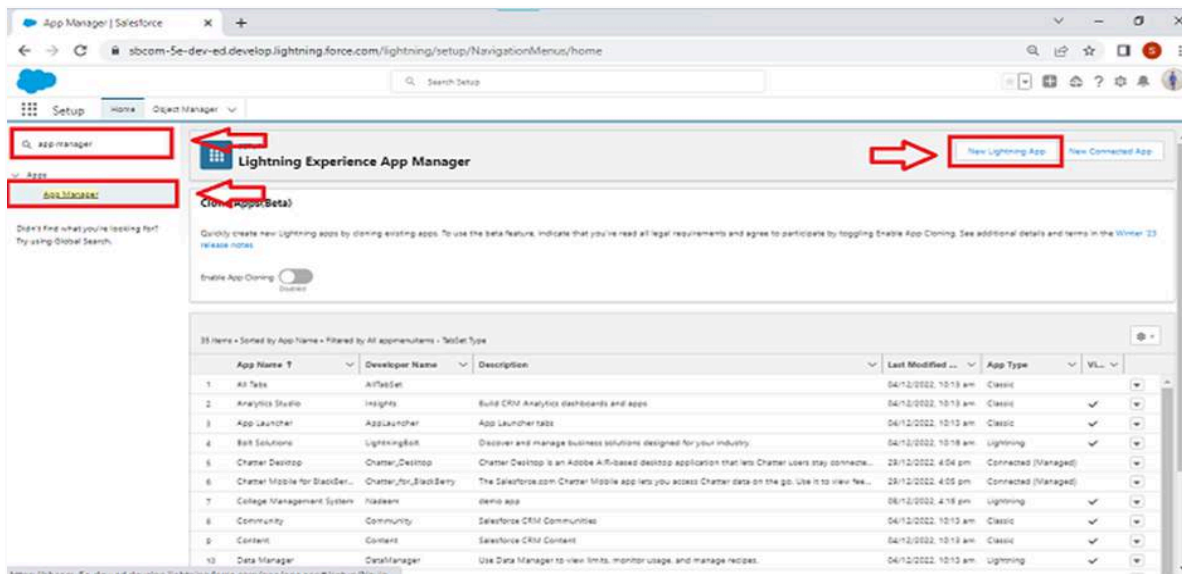
Step 2 : Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.

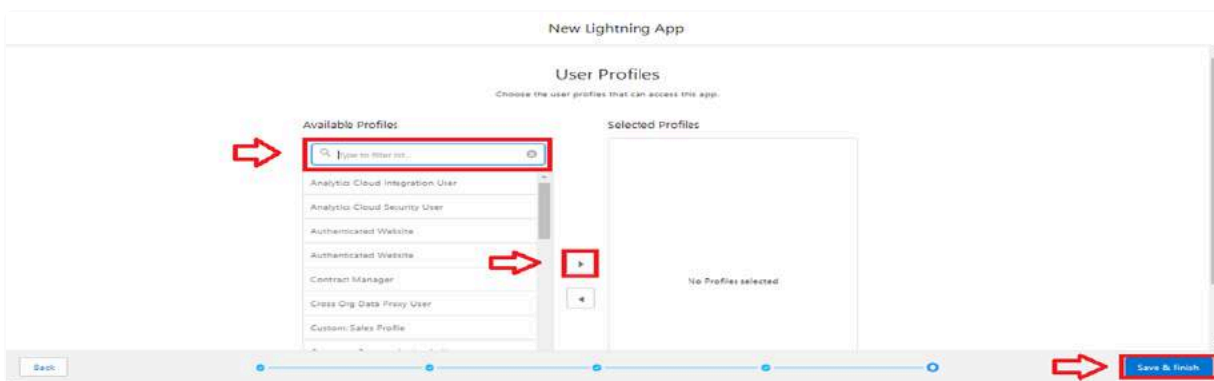
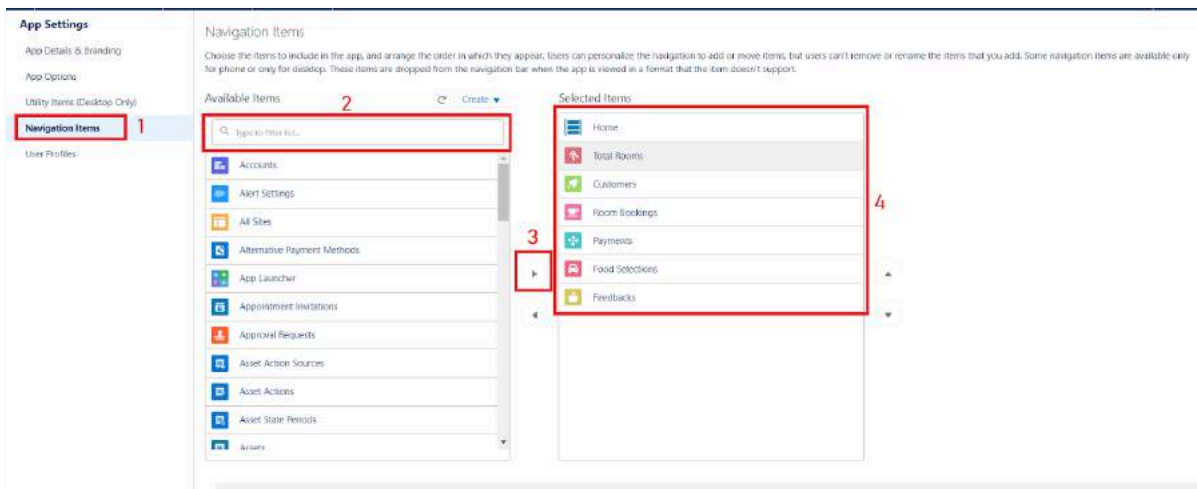
Step 3 : To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers1, Room Booking, Payments1, Food selection, Feedbacks, Reports and Dashboards) from the search bar and move it using the arrow button > Next.

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

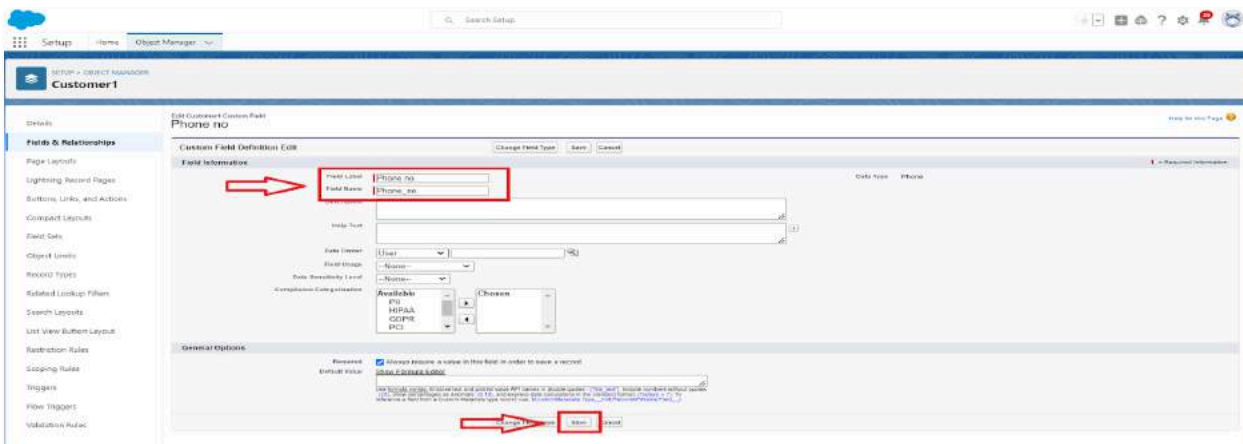
Step 5 : Fill the Above as following:

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.



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:

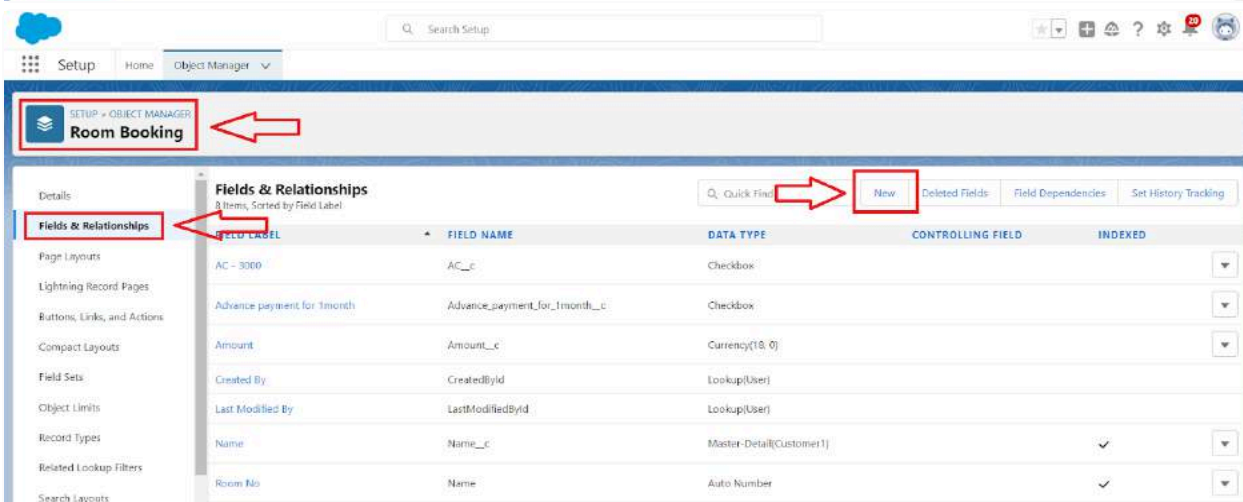
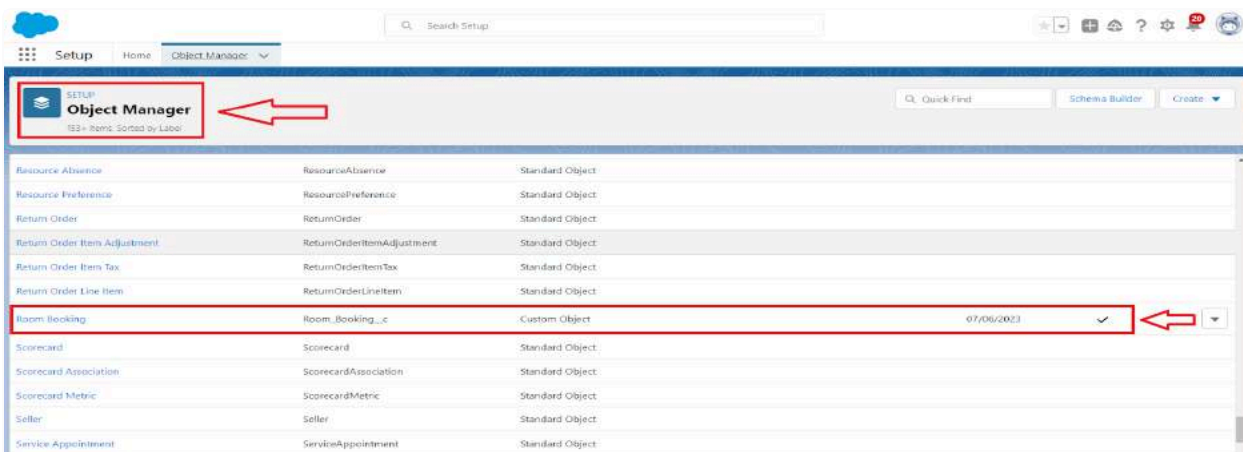
Step 2 : Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.

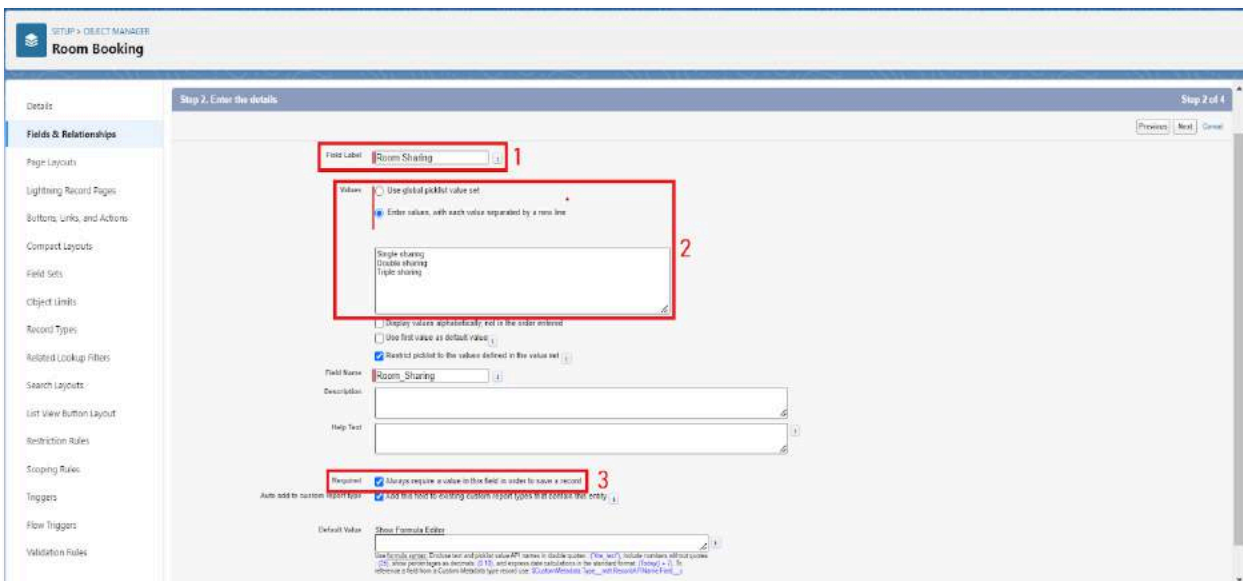
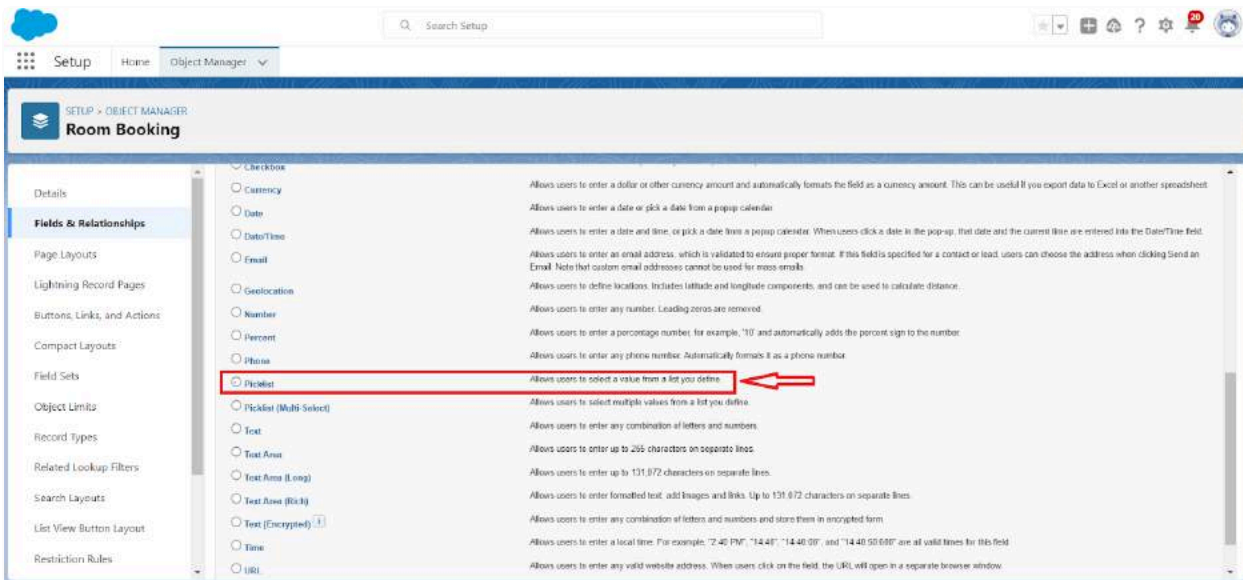
Step 3 : Now click on “Fields & Relationships” > New

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.

Setup Home Object Manager

Object Manager
133 Items, Sorted by Label

Quick Find Schema Builder Create

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 07/06/2023 ✓
Scorecard	Scorecard	Standard Object
Scorecard Association	ScorecardAssociation	Standard Object
Scorecard Metric	ScorecardMetric	Standard Object
Seller	Seller	Standard Object
Service Appointment	ServiceAppointment	Standard Object

Setup Home Object Manager

Room Booking

Details Fields & Relationships 3 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
AC - 3000	AC__c	Checkbox		
Advance payment for 1 month	Advance_payment_for_1month__c	Checkbox		
Amount	Amount__c	Currency(10, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer)		✓
Room No	Name	Auto Number		✓

Setup Home Object Manager

Room Booking

Details 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 (1) A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

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

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

- The relationship field is required on all detail records.
- 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 roll-up 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 popup list. The master object is the source of the values in the list.

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

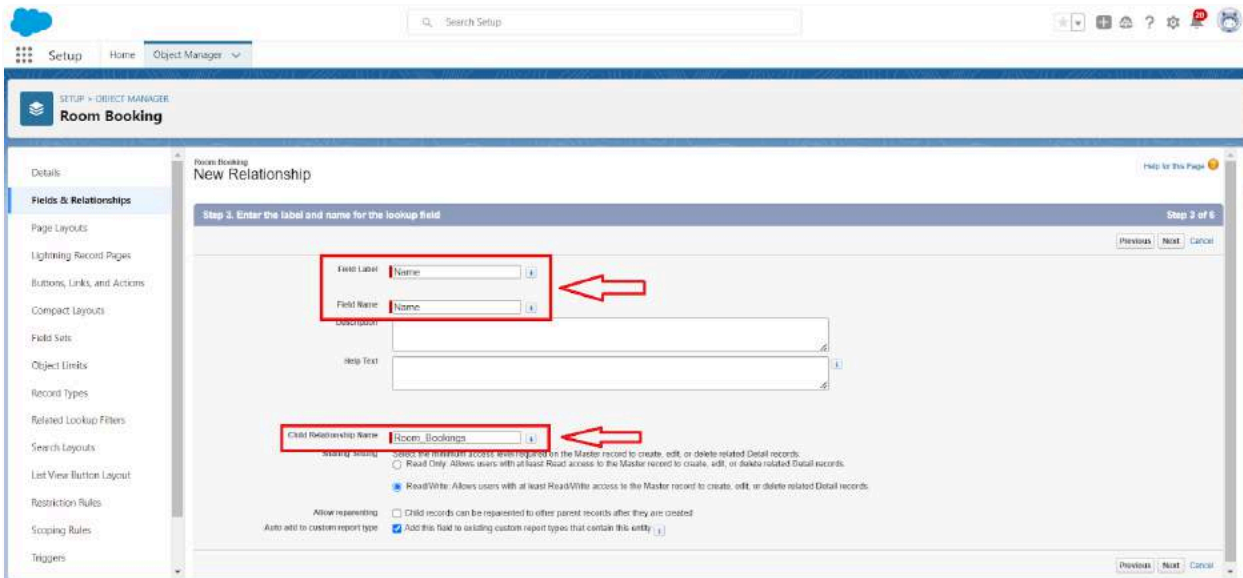
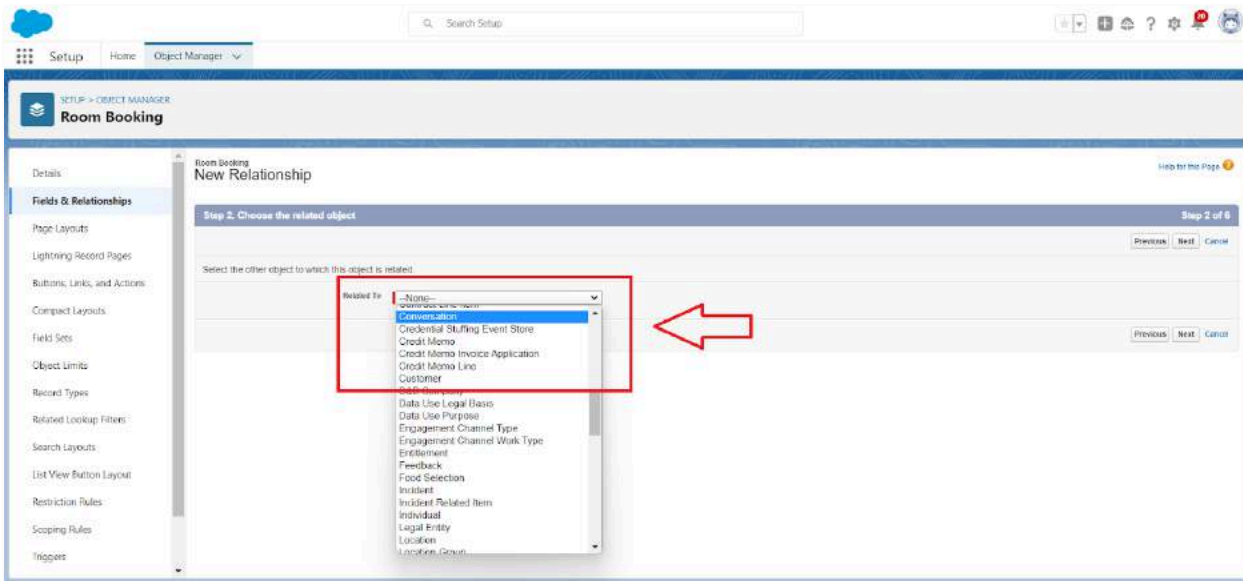
Checkbox Allows users to select a True (checked) or False (unchecked) value.

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 pick a date from a popup calendar.

Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users pick 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.



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

The screenshot shows the 'New Custom Field' dialog box in Salesforce, specifically Step 3 of 5: 'Define the summary calculation'. The dialog is titled 'Total Rooms' and 'New Custom Field'. It has a 'Help for this Page' link in the top right. The 'Select Object to Summarize' section shows 'Master Object' as 'Total Room' and 'Summarized Object' as 'Room Bookings'. The 'Select Roll-Up Type' section shows the 'COUNT' radio button selected. The 'Field to Aggregate' is set to 'Name'. The 'Filter Criteria' section shows 'All records should be included in the calculation' selected. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

8. Field Name : " Rooms Available "

Follow the below steps to create field in an object:

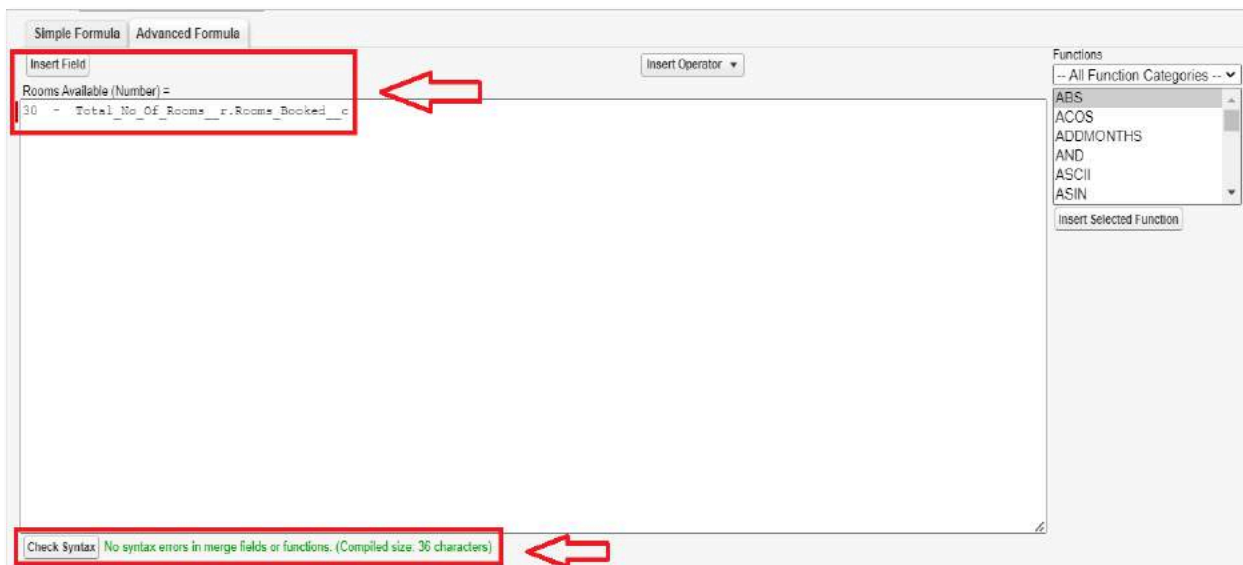
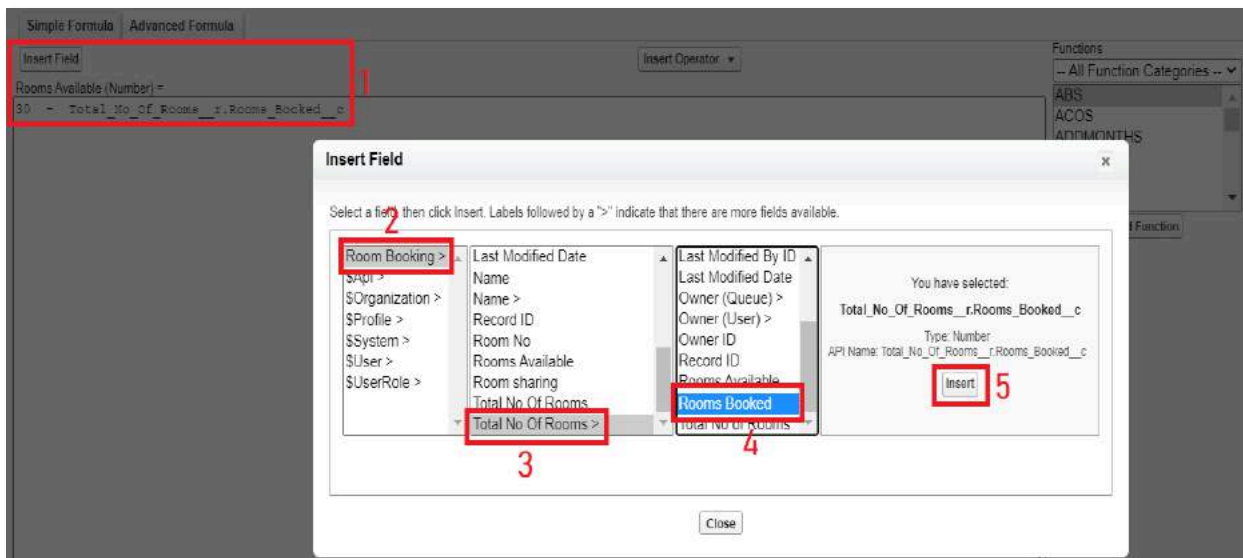
Step 1 : Go to setup > click on Object Manager > type object name(Rooms Booking) in the search bar > click on the object.

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

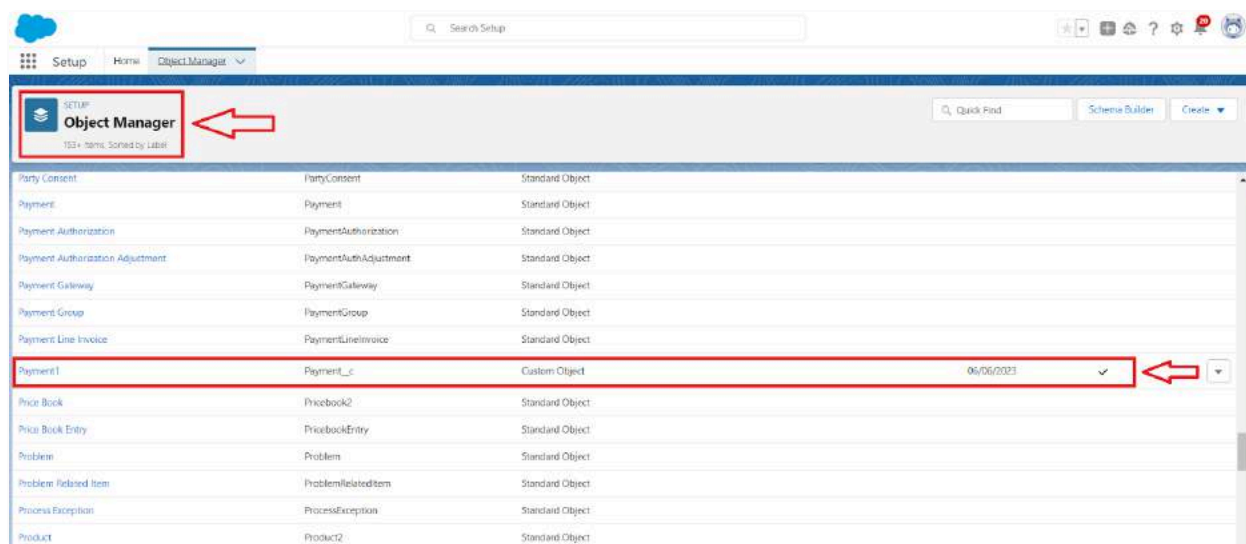
Step 3 : Select Data Type as a “Master-detail Relationship”

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

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name_c	Master-Details(Customer)		
Payment ID	Payment_ID_c	Number(16, 0)		
Payment Mode	Payment_Mode_c	Picklist		
Payment No	Name	Auto Number		
Room Booking	Room_Booking_c	Lookup(Room Booking)		

Setup Home Object Manager

Payment1

Details

Fields & Relationships

Fields & Relationships

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

Data Type

None Selected

Auto Number

Formula

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

Master-Detail Relationship

- Creates a special type of parent-child relationship between the object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The naming 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 other summary fields on the master record to summarize the detail records.

Setup Home Object Manager

Payment1

Details

Fields & Relationships

Fields & Relationships

Payment

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

None

Credit Memo Line

Customer

DAB Company

Duty Line 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

Fields & Relationships

Payment

New Relationship

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

Field Label

Field Name

Child Relationship Name

Payments1

Sharing Setting

Read Only

Read/Write

Allow reparenting

Auto add to custom report type

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.

The image shows two screenshots of the Salesforce Object Manager interface. The top screenshot displays the 'Object Manager' page with a list of objects. The 'Payment1' object is highlighted with a red box and an arrow. The bottom screenshot shows the 'Fields & Relationships' section for the 'Payment1' object. The 'Fields & Relationships' section is highlighted with a red box and an arrow. The 'New' button is also highlighted with a red box and an arrow. The table below shows the fields and relationships for the 'Payment1' object.

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_s	Master-Detail(Customer1)		✓
Payment ID	Payment_ID__c	Number(16, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number		✓
Room Booking	Room_Booking__c	Lookup(Room Booking)		✓

3 . Field Name : " Payment Mode "

Follow the below steps to create field in an object:

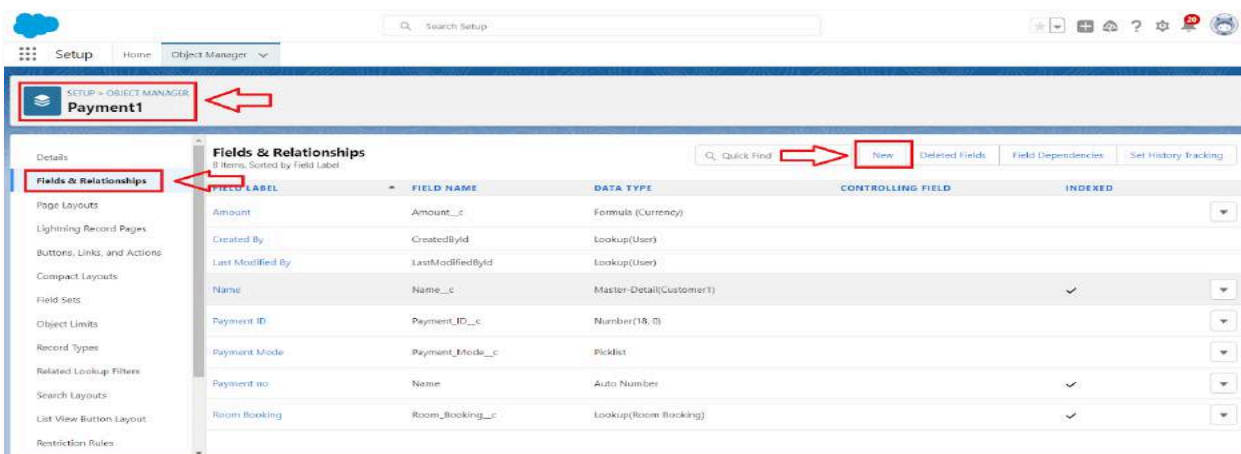
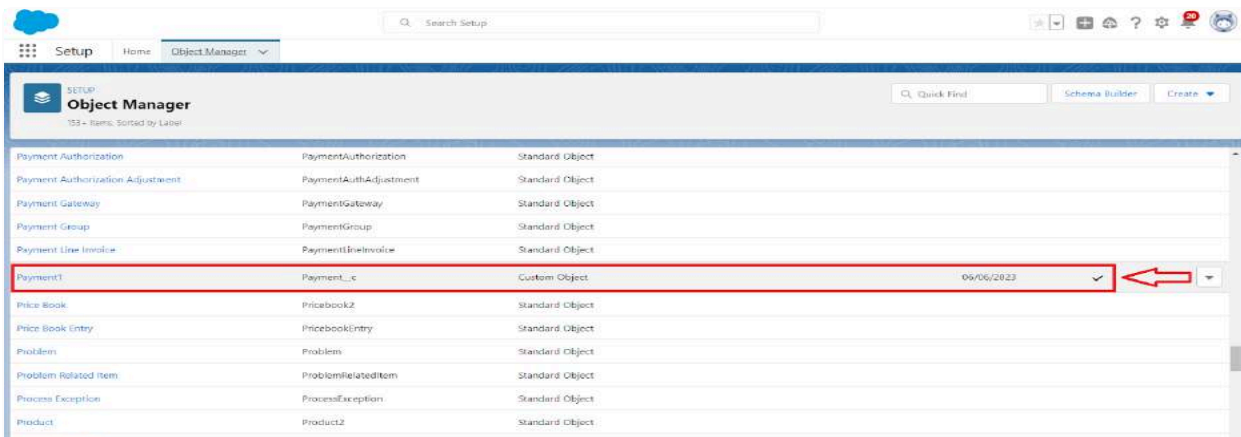
Step 1 : Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.

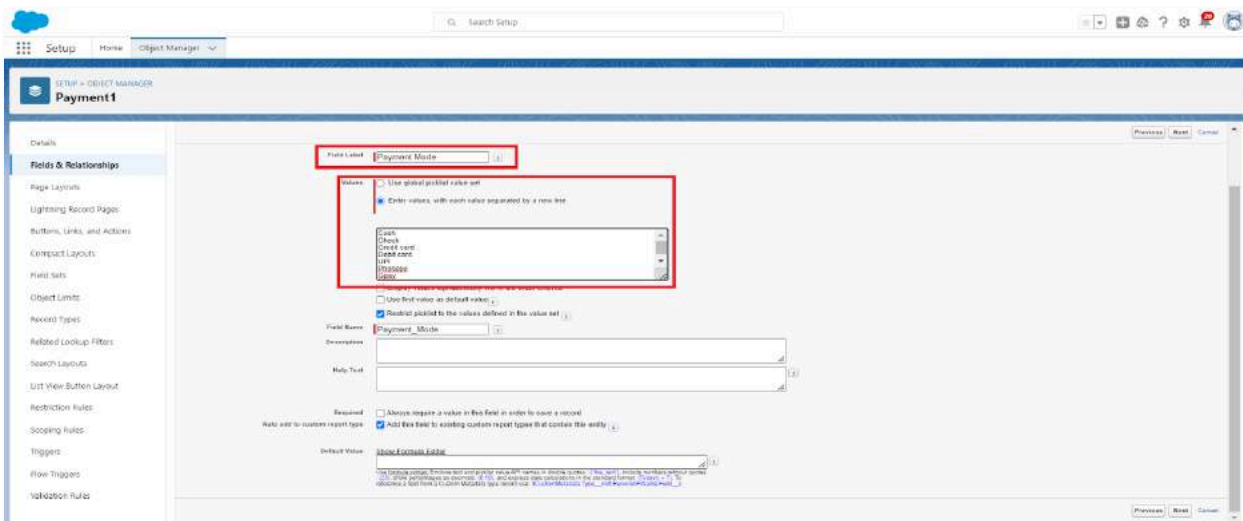
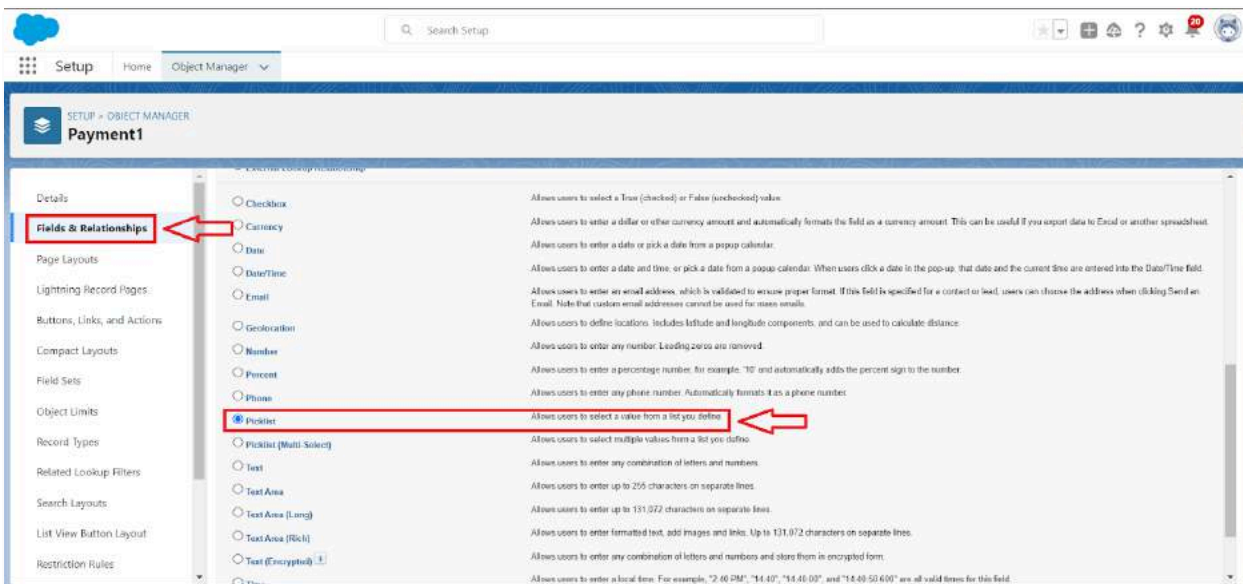
Step 2 : Now click on “Fields & Relationships” > New

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.

Setup | Home | Object Manager

Object Manager

153 Items, Sorted by Label

Object Label	Object Name	Object Type	Last Modified By	Last Modified Date	Actions
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			

Setup | Home | Object Manager

Object Manager

Payment1

Details

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
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)		✓

Setup | Home | Object Manager

Object Manager

Payment1

Details

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 sequential number that uses a display format you define. The number is automatically incremented for each new record.

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

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

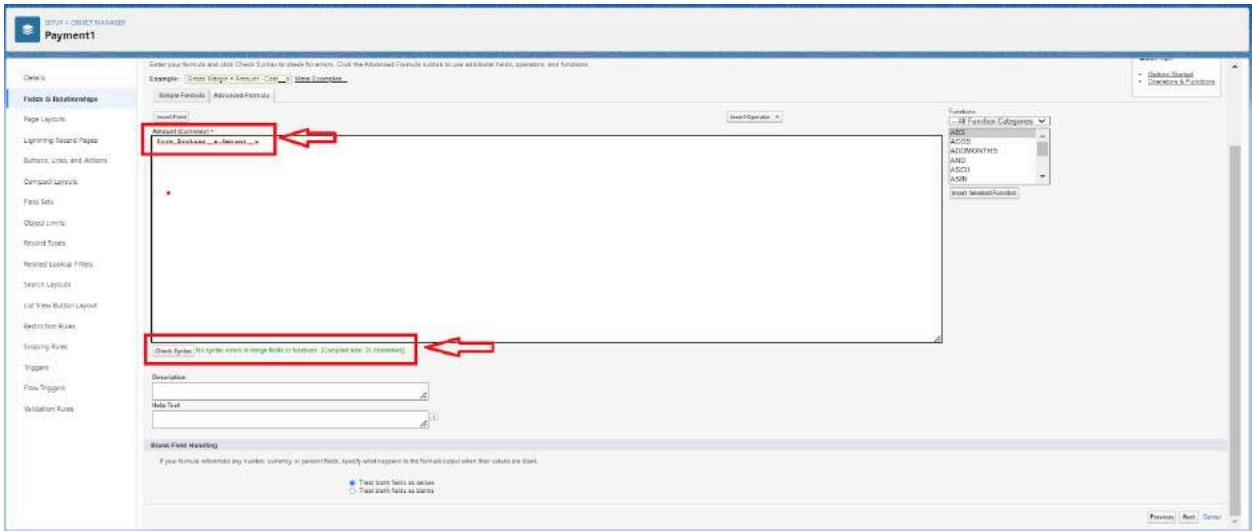
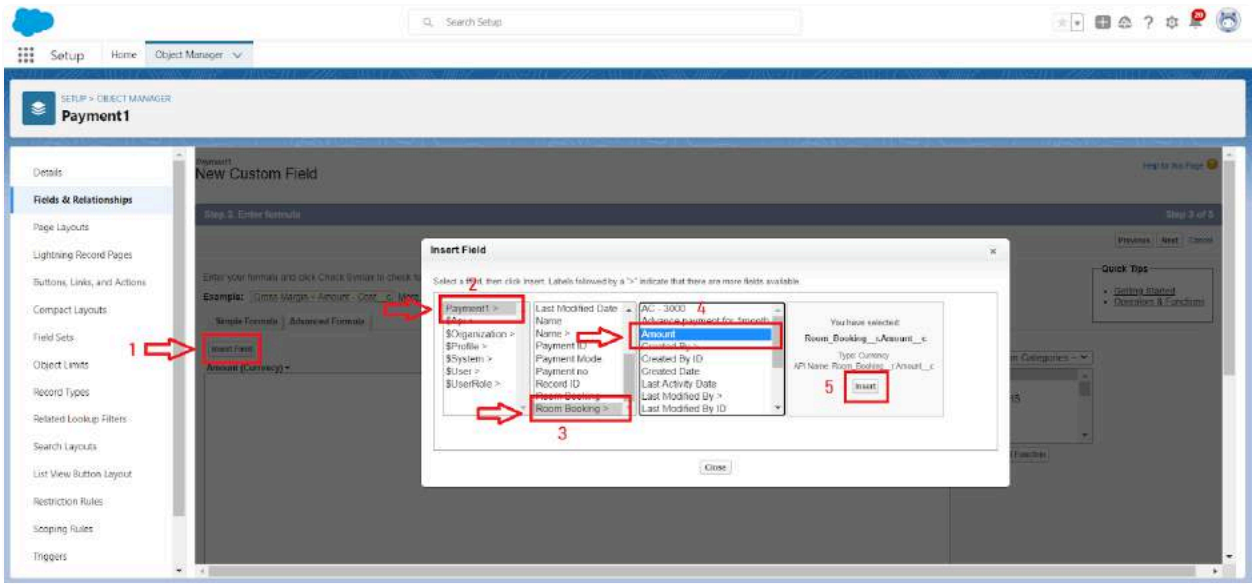
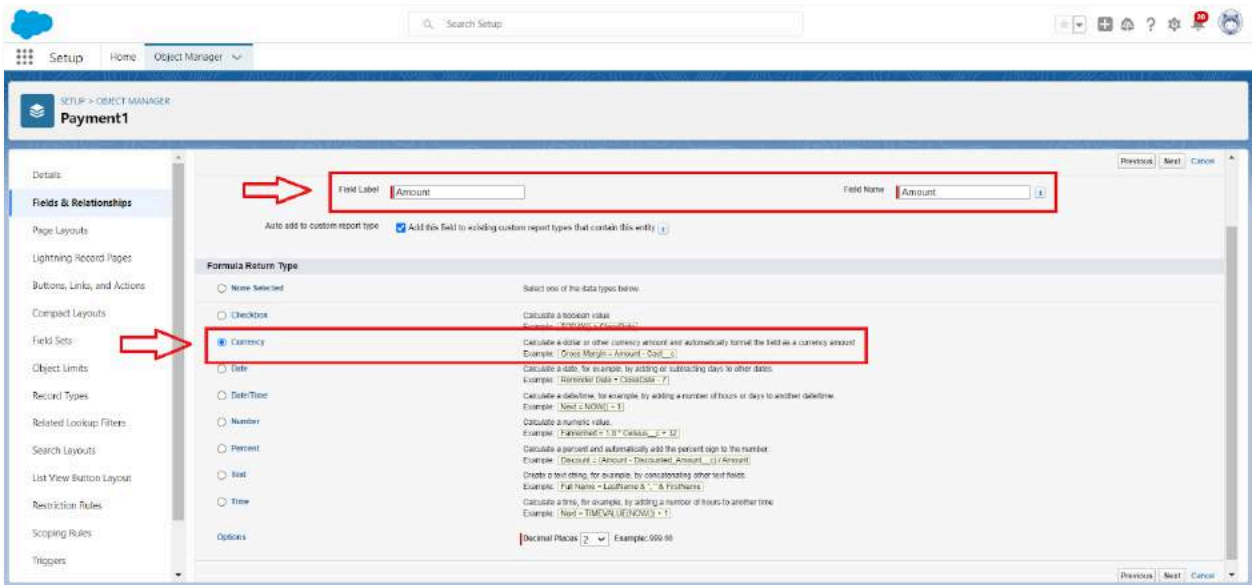
Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

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

- The relationship field is required on all detail records.
- 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 roll-up 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 popup list. The master object is the source of the values in the list.

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



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

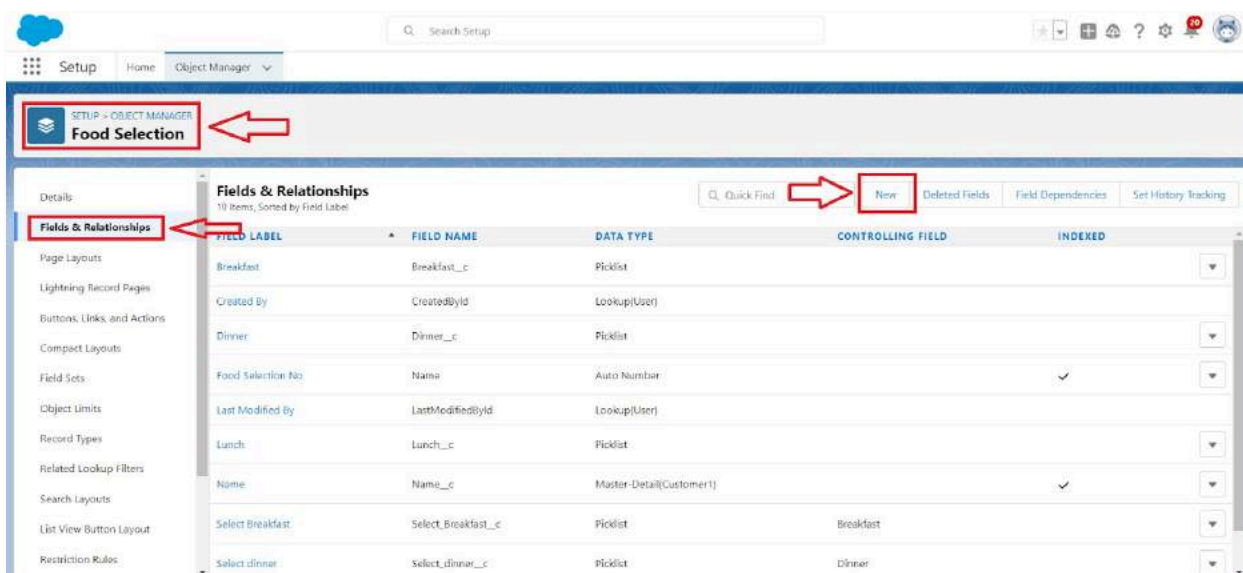
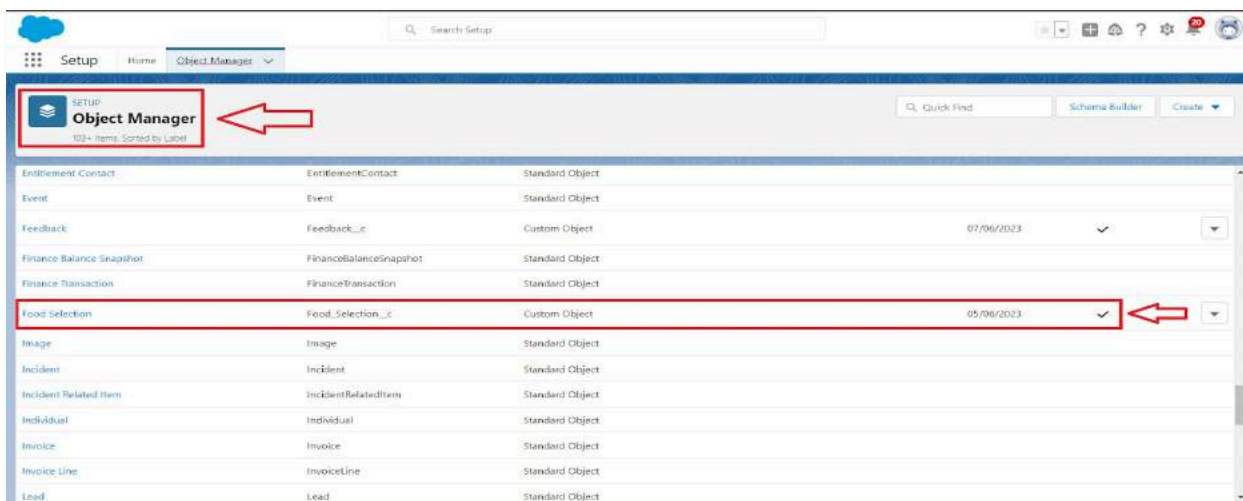
Step 3 :Select Data Type as a “Master-detail Relationship”

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.



* 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 ”

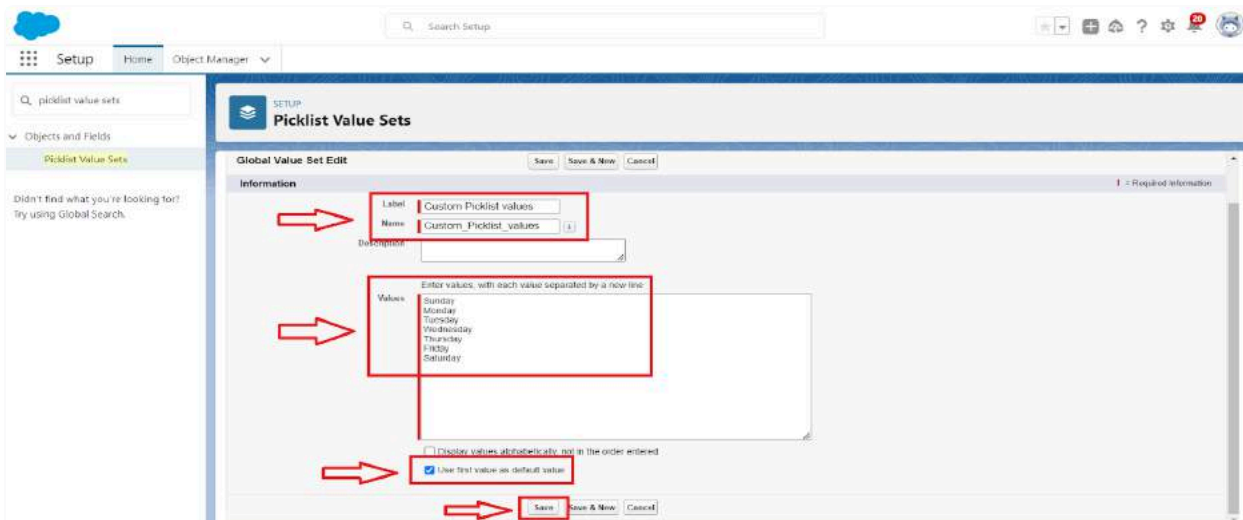
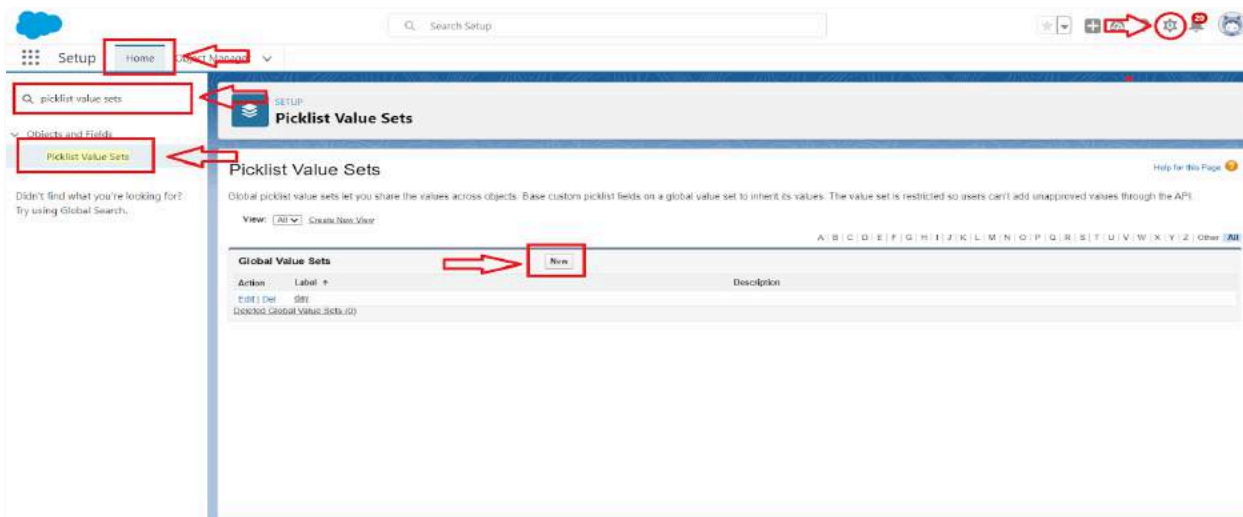
Step 3 : Click on the Picklist value set and click on new

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:

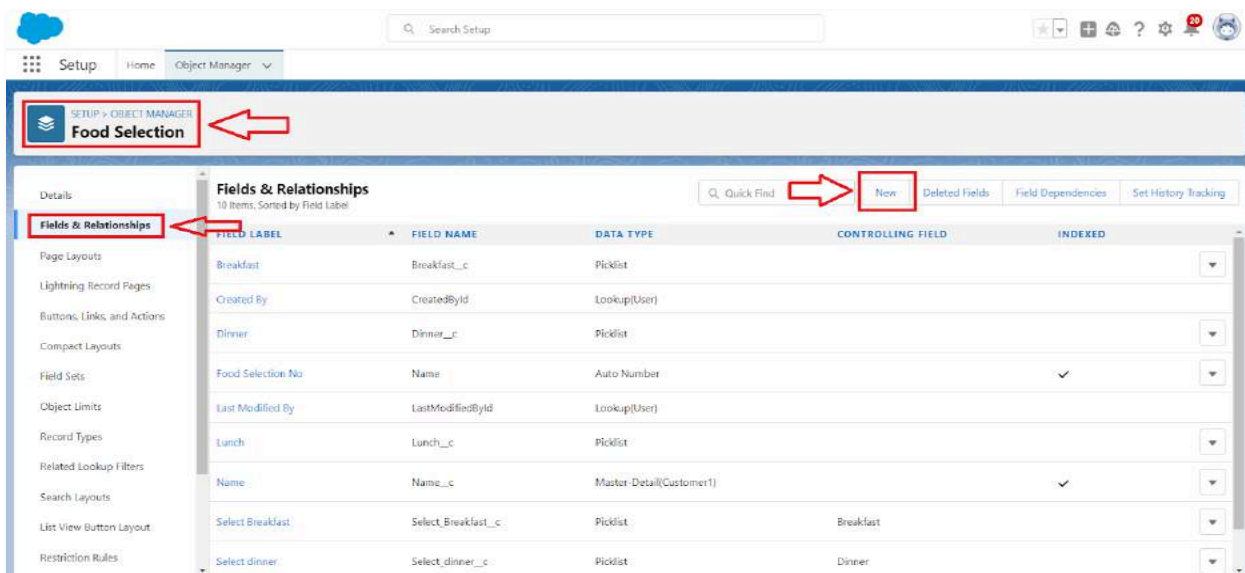
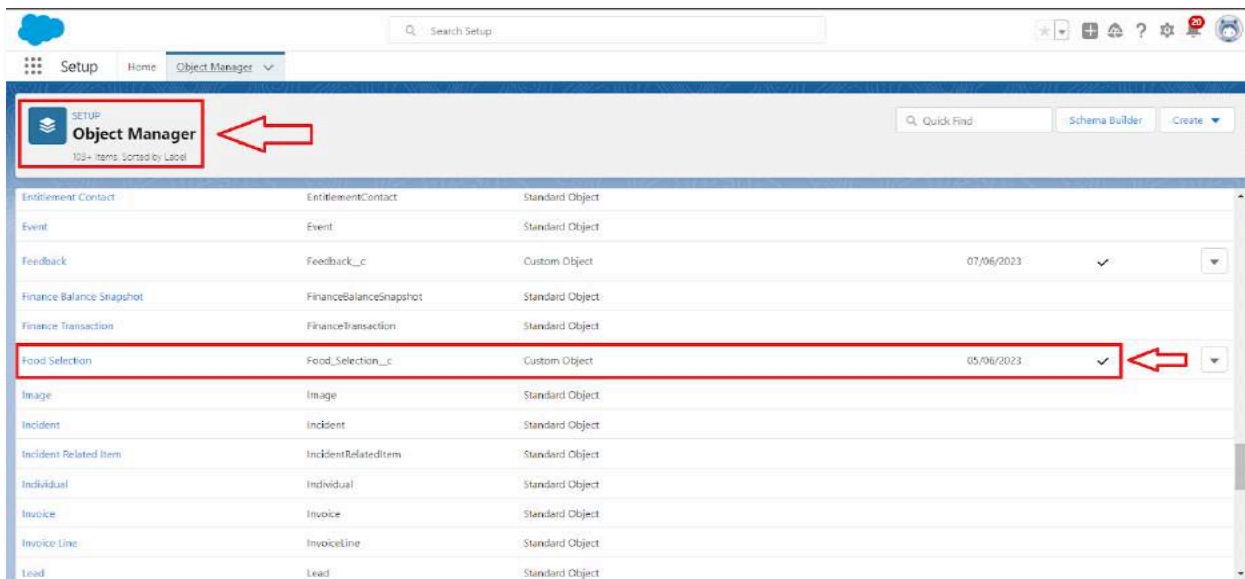
Step 2 : Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.

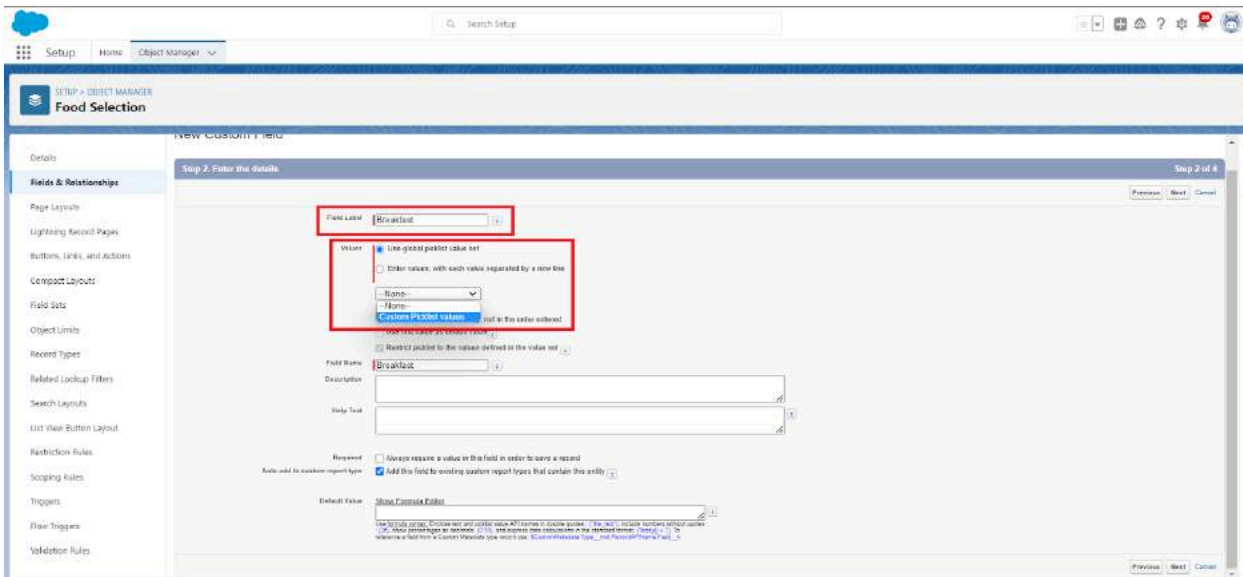
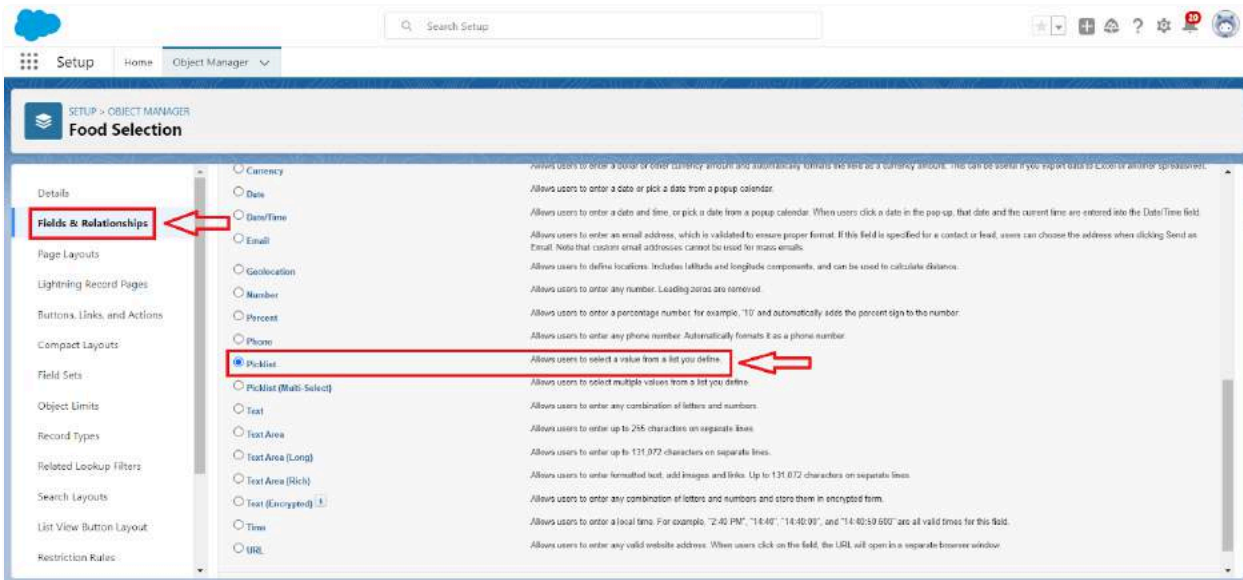
Step 3 : Now click on “Fields & Relationships” > New

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”

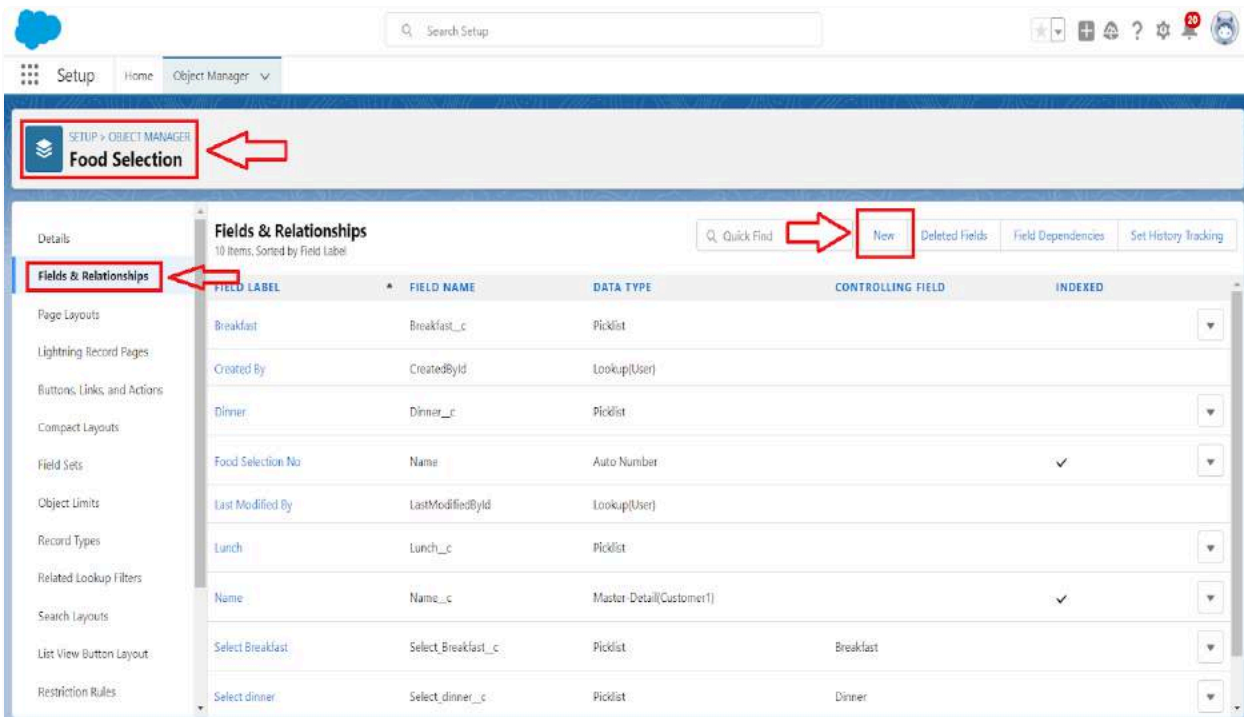
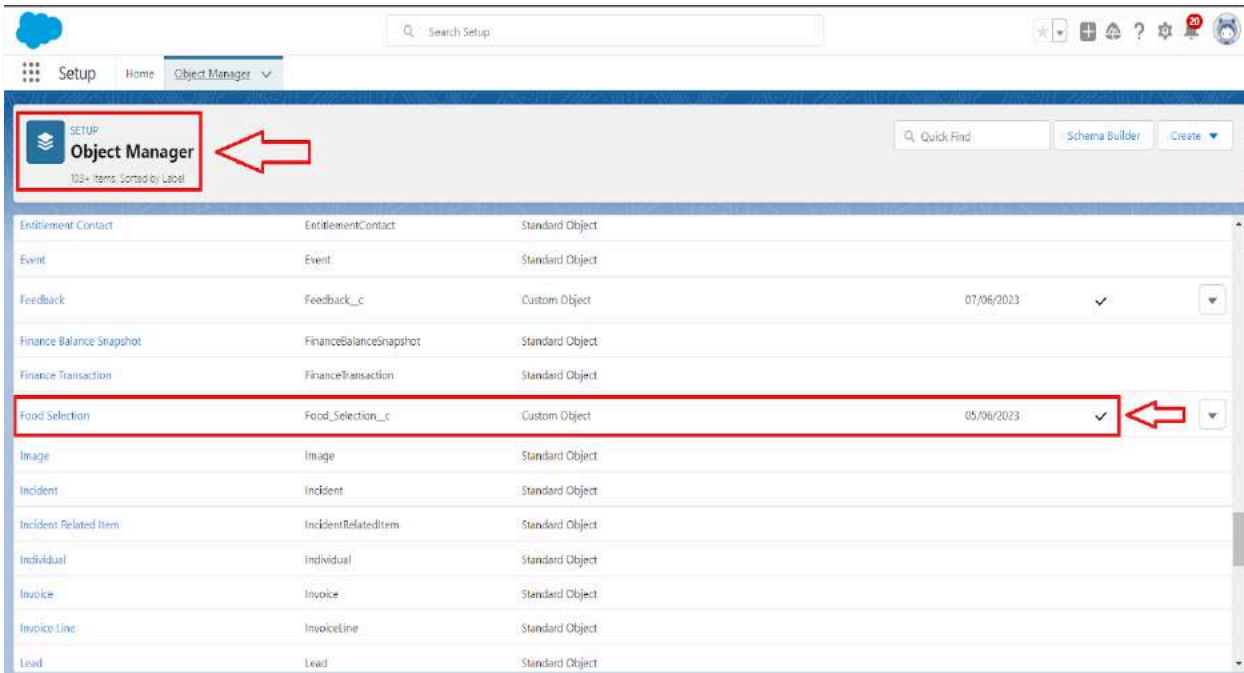
Step 4 : Fill the Above as following:

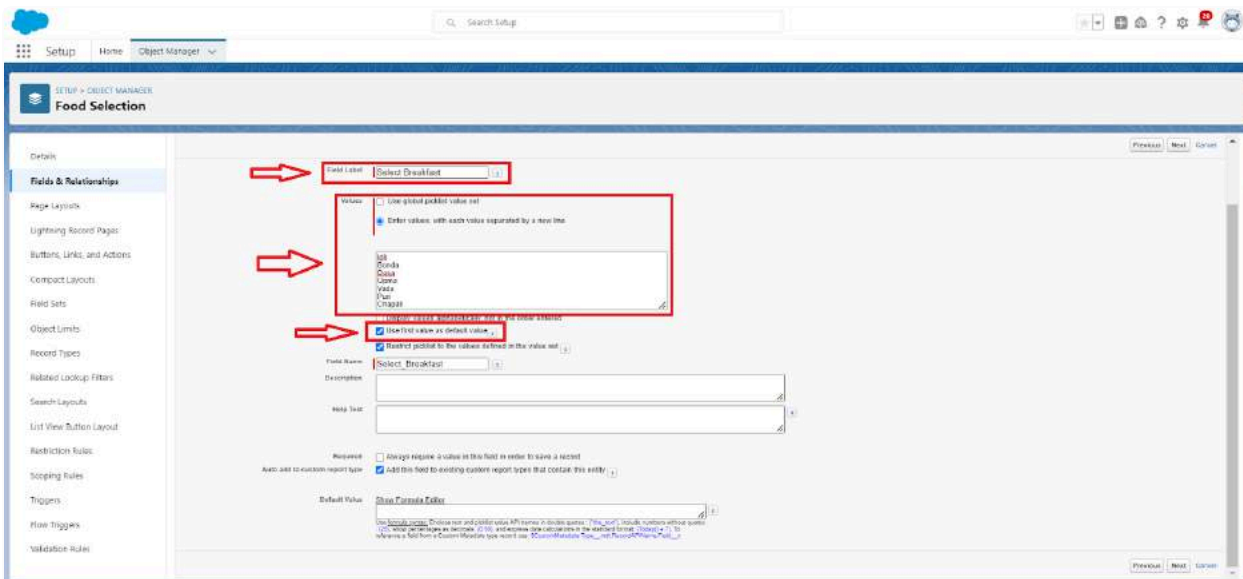
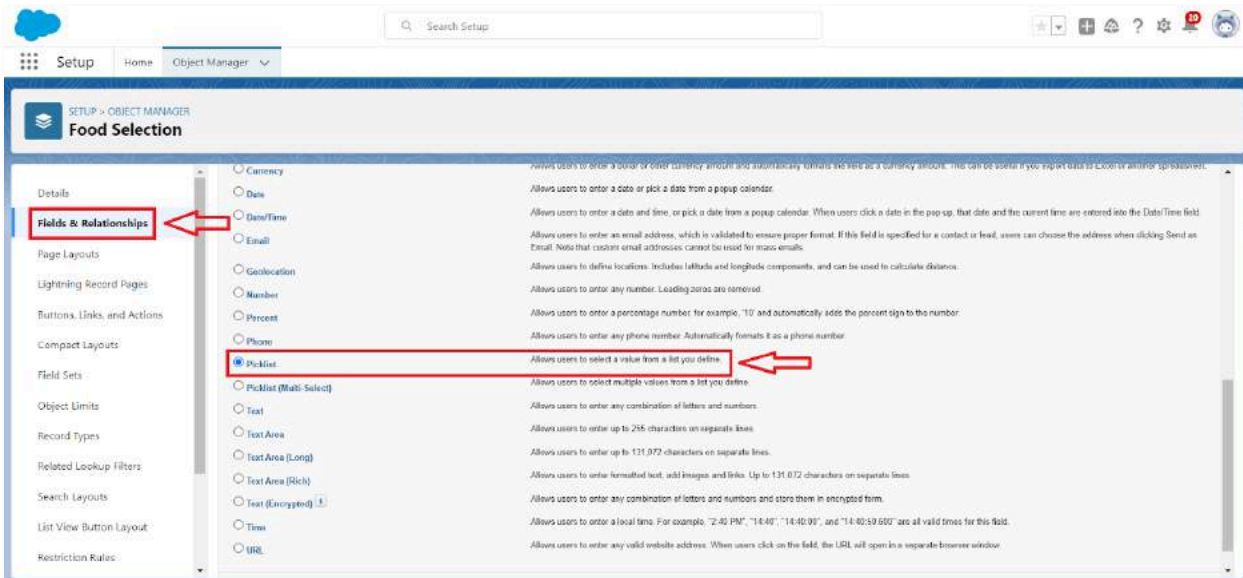
- Field Label: Select Breakfast
- Under Value - Enter values, with each value separated by a new line
 - i. Idli
 - ii. Bonda
 - iii. Dosa

- 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

Object Manager
102+ Items, Sorted by Label

Quick Find Schema Builder Create

Object Label	Object Name	Object Type	Created Date	Active	Actions
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

Object Manager
Food Selection

Quick Find New Standard New Field Dependencies Set History Tracking

Details Fields & Relationships 10 Items, Sorted by Field Label

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

Setup Home Object Manager

Object Manager
Food Selection

Details Fields & Relationships

Food Selection Field Dependencies

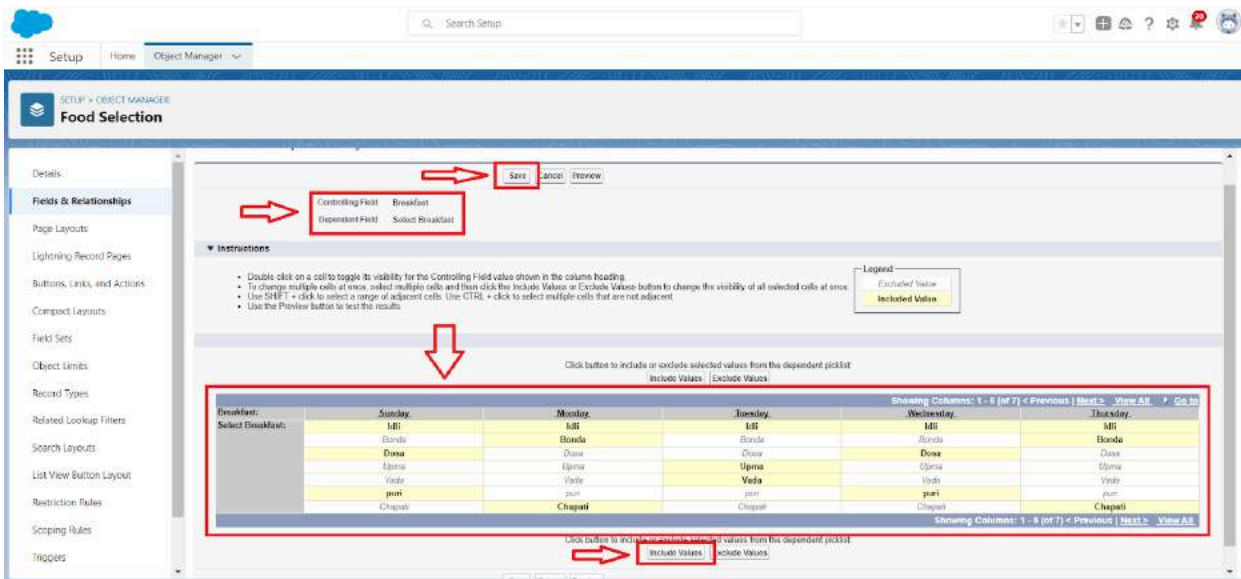
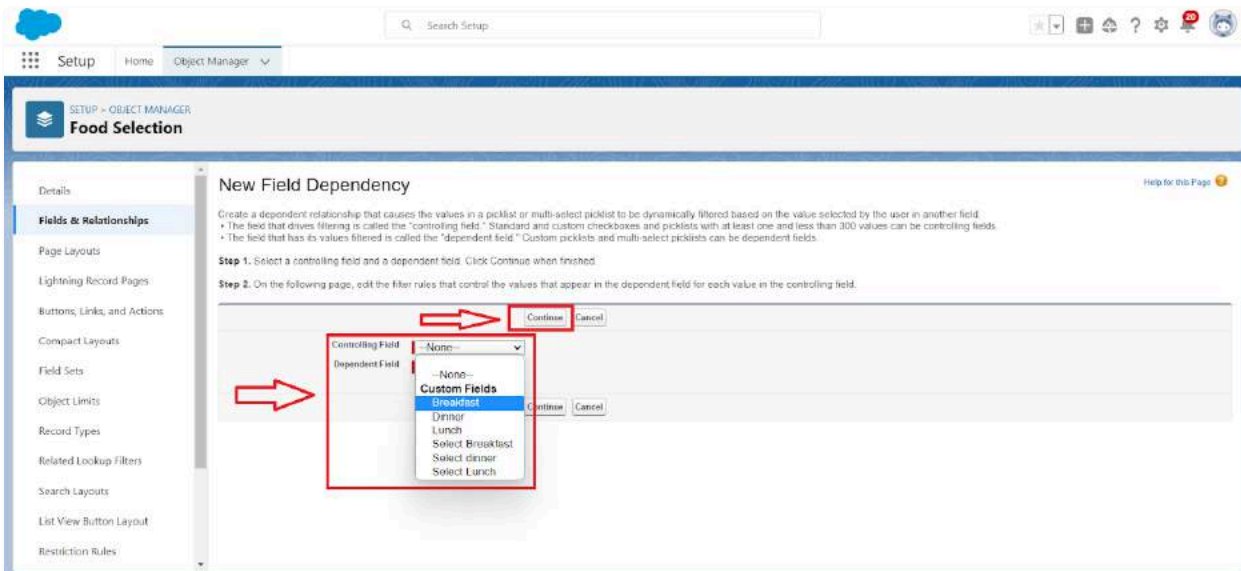
Back to Custom Object: Food Selection Help for this Page

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	Veera Venkata Varaprasad Andoethu 07/06/2023, 3:40 pm
Edit Del	Dinner	Select dinner	Veera Venkata Varaprasad Andoethu 07/06/2023, 3:55 pm
Edit Del	Lunch	Select Lunch	Veera Venkata Varaprasad Andoethu 07/06/2023, 3:56 pm



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.

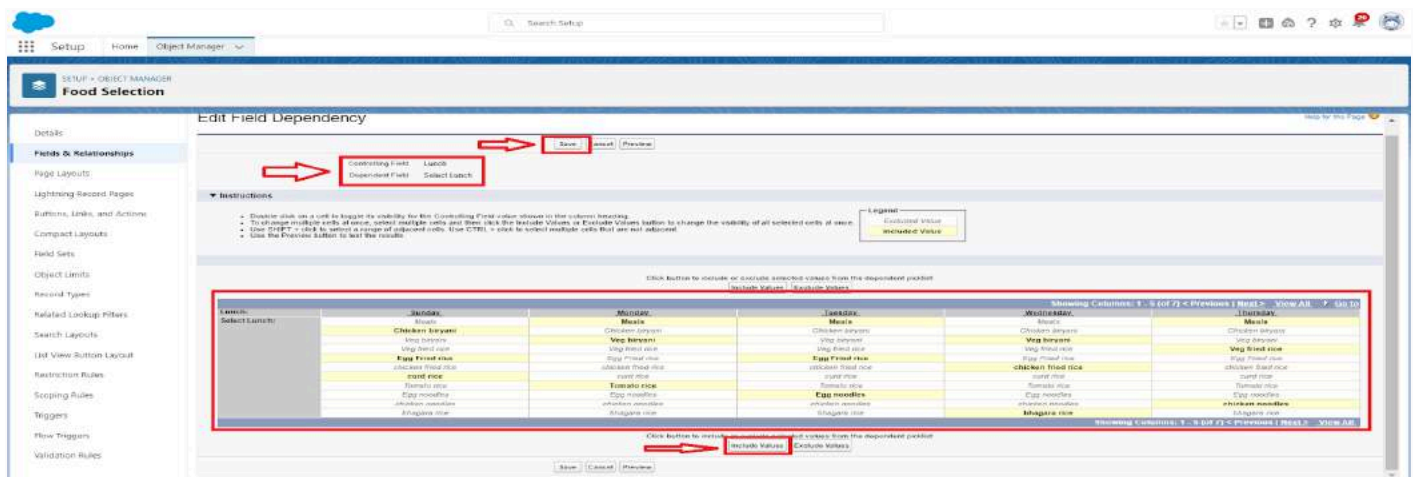
Step 1 : Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.

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.

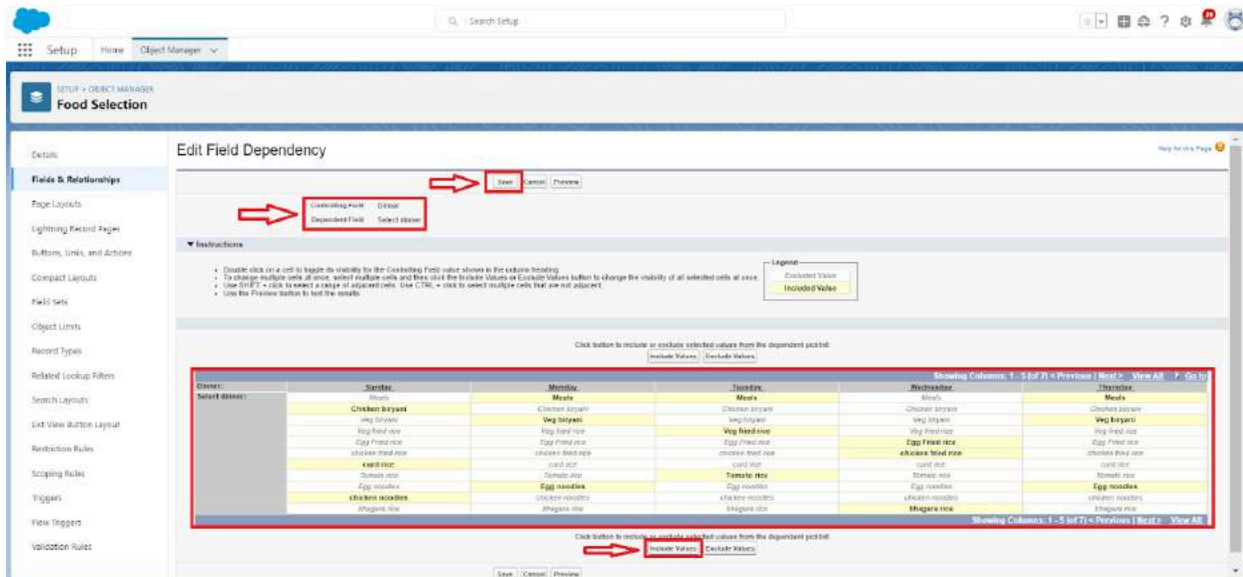
Step 2 : Now Click on fields & relationships and Click on Field Dependencies

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.

Setup Home Object Manager

Object Manager

103+ Items, Sorted by Label

Quick Find Schema Builder Create

Engagement Channel Type	EngagementChannelType	Standard Object
Engagement Channel Work Type	EngagementChannelWorkType	Standard Object
Entitlement	Entitlement	Standard 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
Image	Image	Standard Object
Incident	Incident	Standard Object
Incident Related Item	IncidentRelatedItem	Standard Object
Individual	Individual	Standard Object

https://testnaambridge-265-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01500000026z7/FieldAndRelationships/view

Setup Home Object Manager

Feedback

Details

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	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)		

Setup Home Object Manager

Feedback

Details

Fields & Relationships

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

Data Type

Select one of the data types below

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

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 pickup list. The other object is the source of the values in the list.

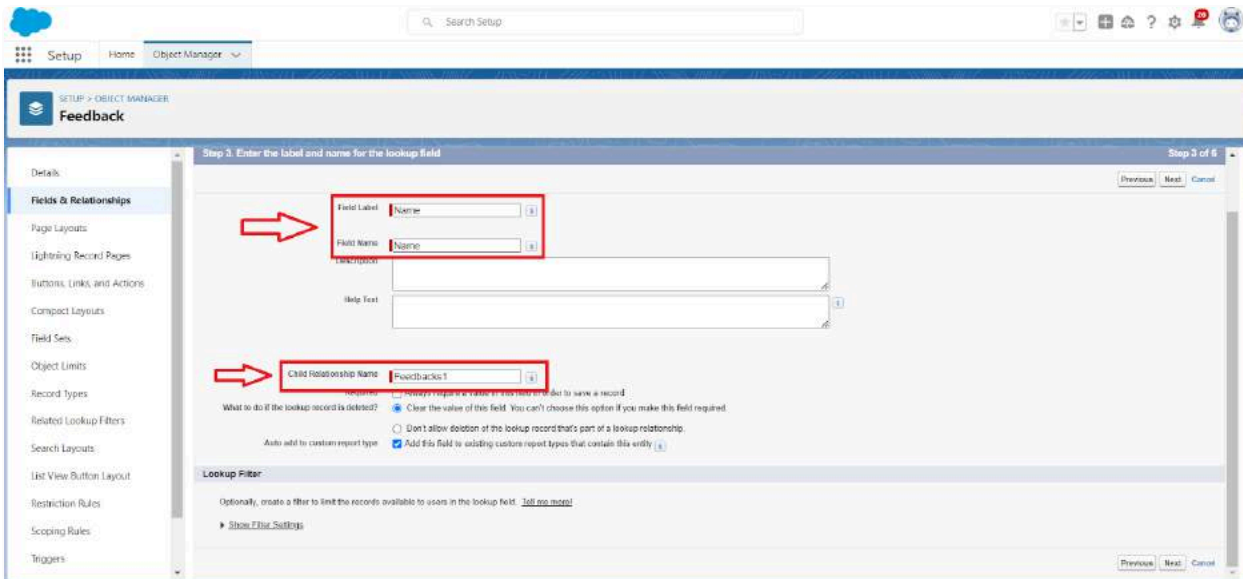
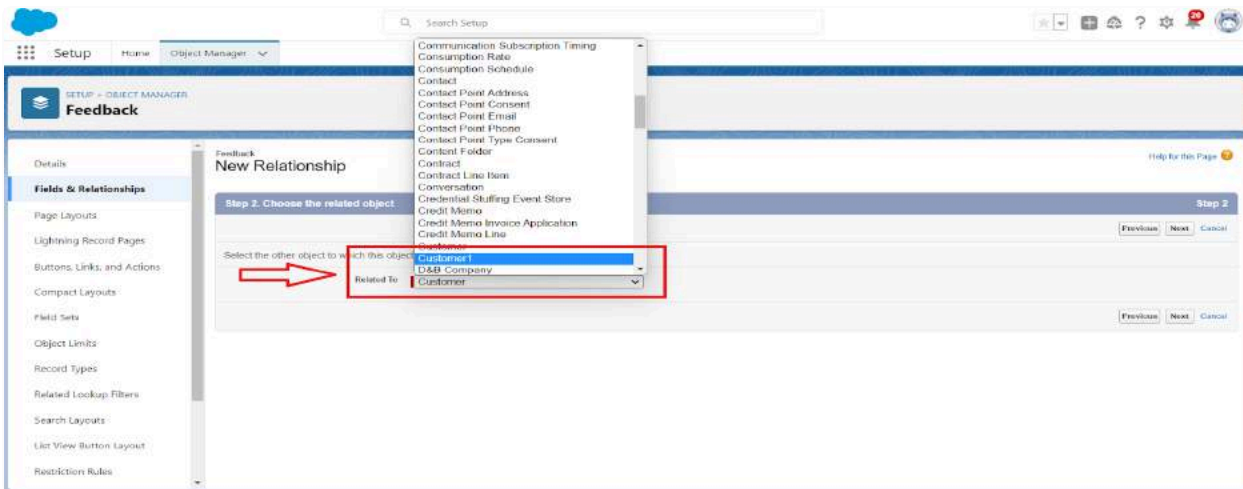
- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail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

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

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

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

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.



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

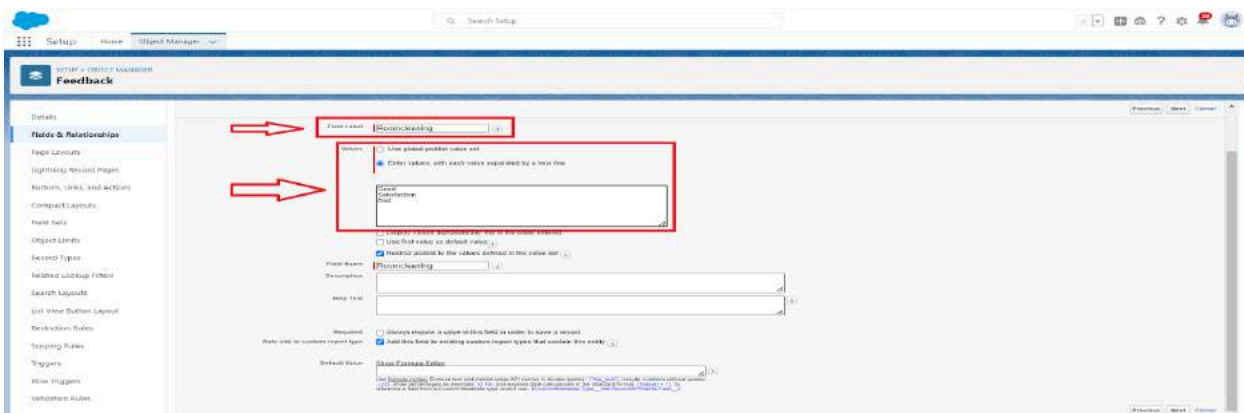
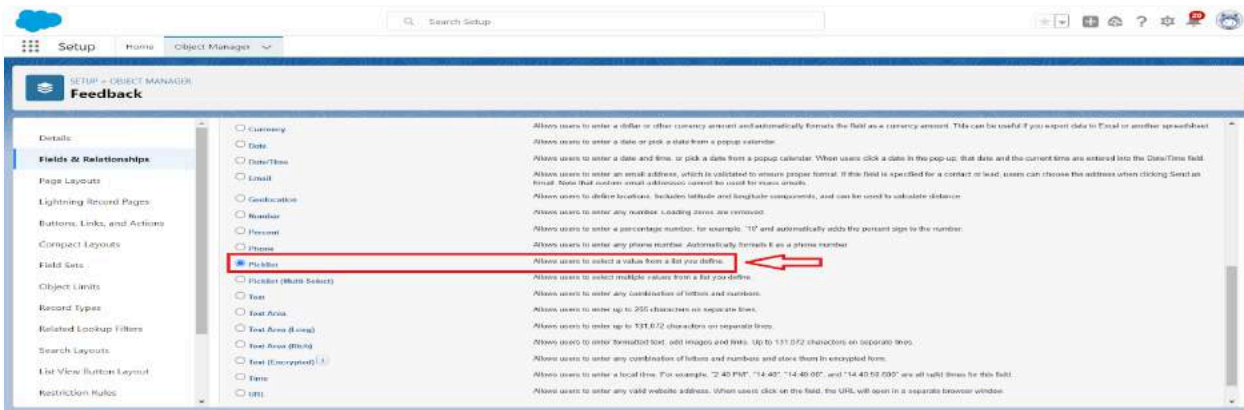
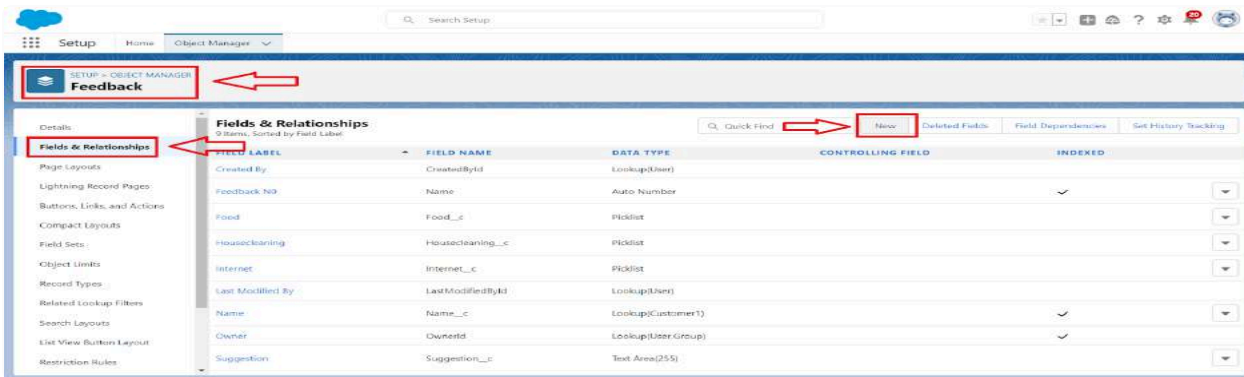
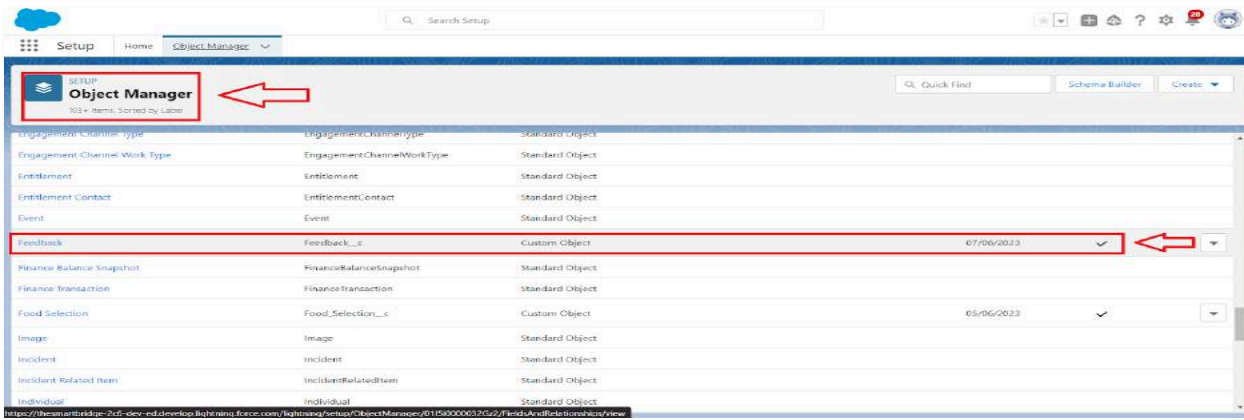
Step 3 : Select Data Type as a “Picklist”

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.



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

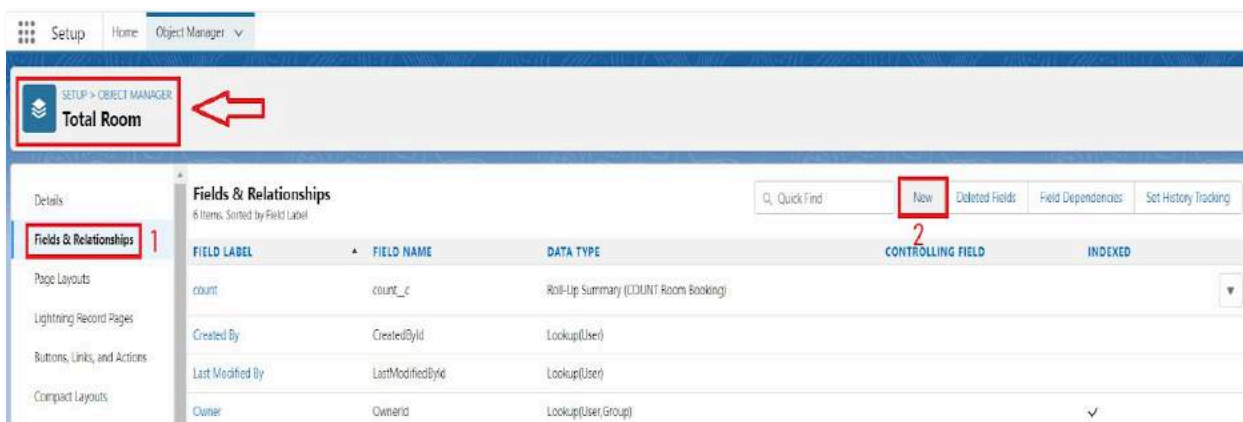
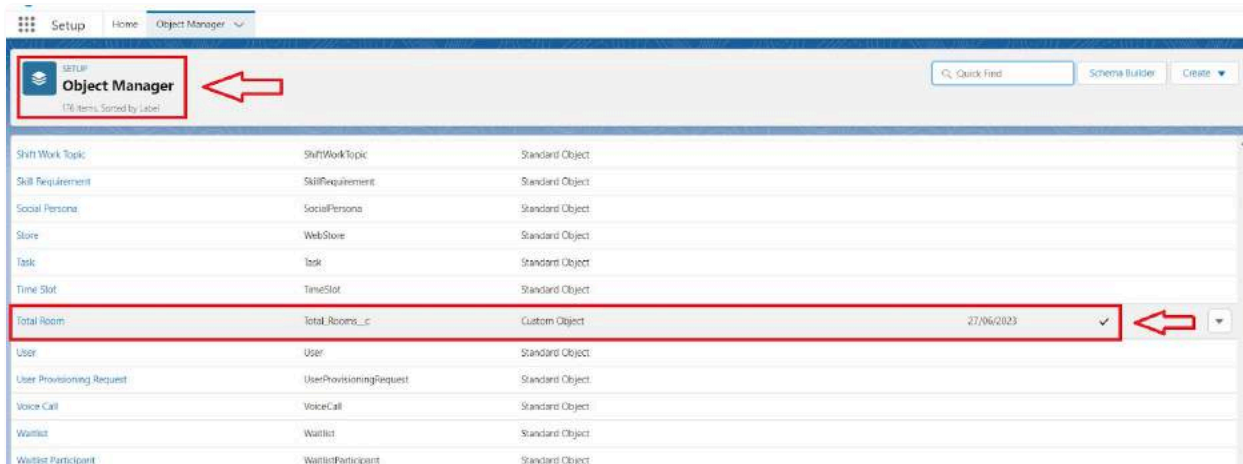
Step 4 : Fill the Above as following:

- 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 Step 1

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

Data Type

☐ None Selected Select one of the data types below.

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

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

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

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

☐ Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
• The relationship field is required on all detail records.

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

Formula Return Type

Field Label: Field Name: 4

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

Formula Return Type

☐ None Selected Select one of the data types below.

☐ Checkbox Calculate a boolean value.
Example: $(\text{ROOMS} > 0) \text{ OR } (\text{DISCOUNT} = 0)$

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: $(\text{Discount_Margin} \times \text{Amount} / \text{Cost_C})$

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: $(\text{StartDate} \text{ Date } + \text{DaysDelta} \text{ })$

☐ Date/Time Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: $(\text{StartDate} \text{ Date/Time } + \text{HoursDelta} \text{ })$

☒ **Number** Calculate a numeric value.
Example: $(\text{Fahrenheit} \div 1.8 \times \text{Celsius_C} \div 32)$ 5

☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: $(\text{Discount} \div (\text{Amount} - \text{Discount_Amount_C}) / \text{Amount})$

☐ Text Create a text string, for example, by concatenating other field fields.
Example: $(\text{Full Name} = \text{LastName} \&" " \& \text{FirstName})$

☐ Time Calculate a time, for example, by adding a number of hours to another time.
Example: $(\text{Now} + \text{TIMEVALUE}(\text{HOURS})) \times 1$

Options: Examples: 100 6

Simple Formula Advanced Formula

Insert Field

Rooms Available (Number) = 7

30 - Rooms_Booked__c

Insert Operator

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

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.

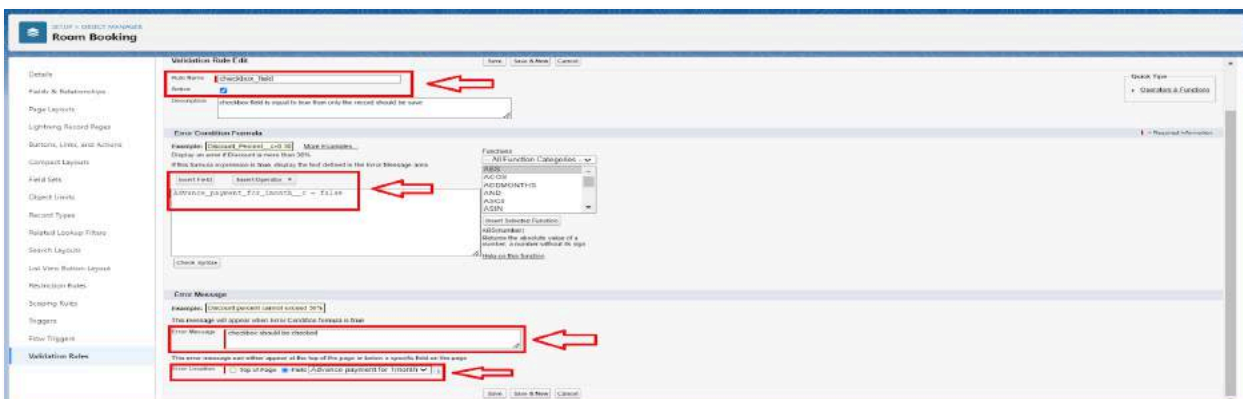
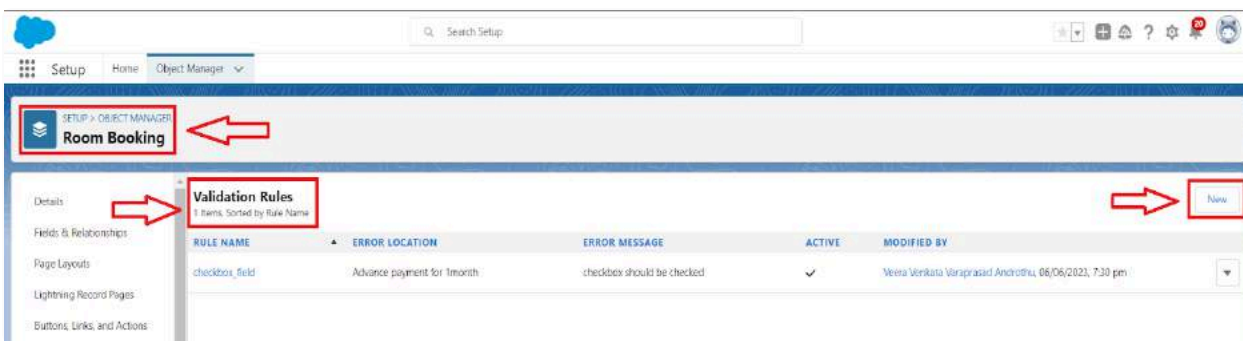
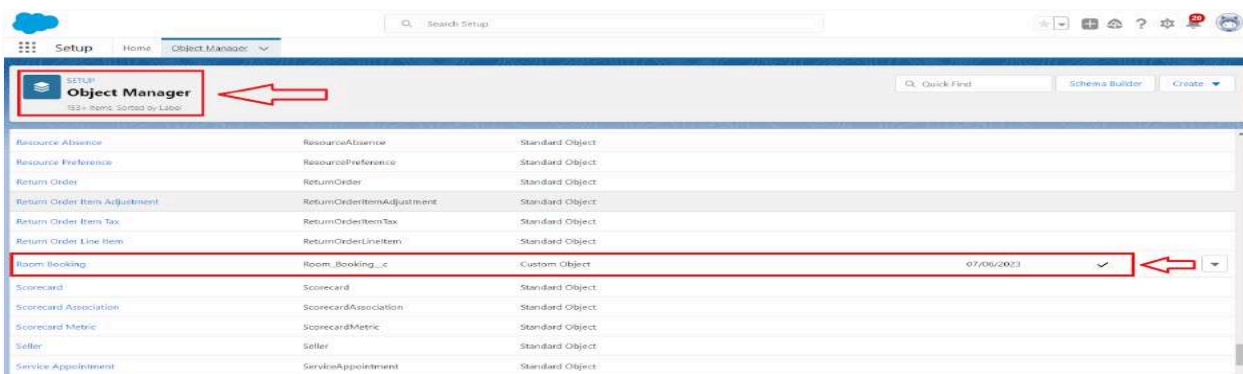
Step 3 : Enter Rule name “checkbox field” and make the validation should be Active.

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.

The screenshot shows the Salesforce validation rule configuration page. Red boxes and numbers highlight the following steps:

- 1:** The **Rule Name** field is set to "check_in_rule" and the **Active** checkbox is checked.
- 2:** The **Error Condition Formula** section shows the formula "Check_in__c = False" entered in the text box. The **Check Syntax** button shows "No errors found".
- 3:** The **Error Message** section shows the message "Check box should be checked" entered in the text box.
- 4:** The **Error Location** section shows the **Field** radio button selected and "Check in" chosen from the dropdown menu.

Other visible elements include a **Quick Tips** box for "Operators & Functions", a **Functions** list on the right, and an example of a validation rule for "Discount_Percent__c" at the top.

TASK 8 : Creation Of Profiles

Profile 1 : Custom user Profile

To create a new profile follow the below steps :

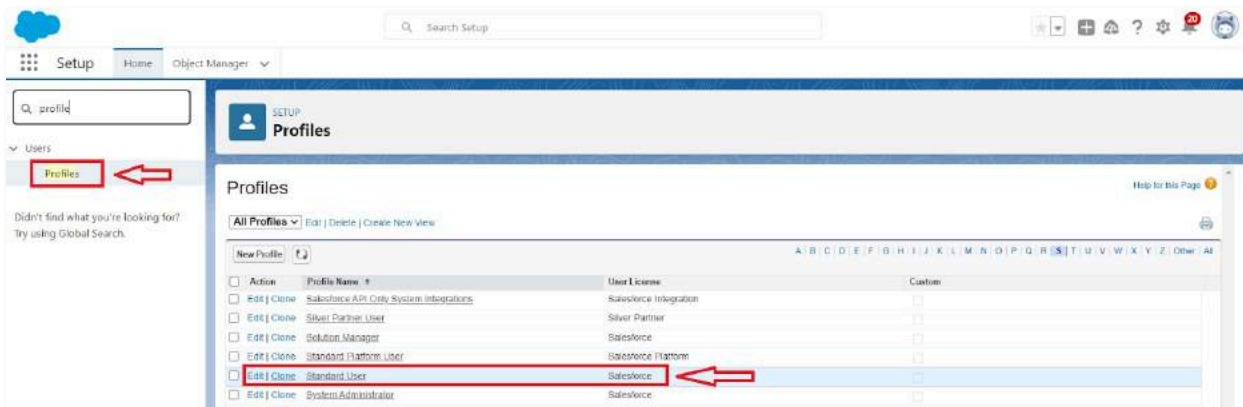
Step 1 : Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard User)

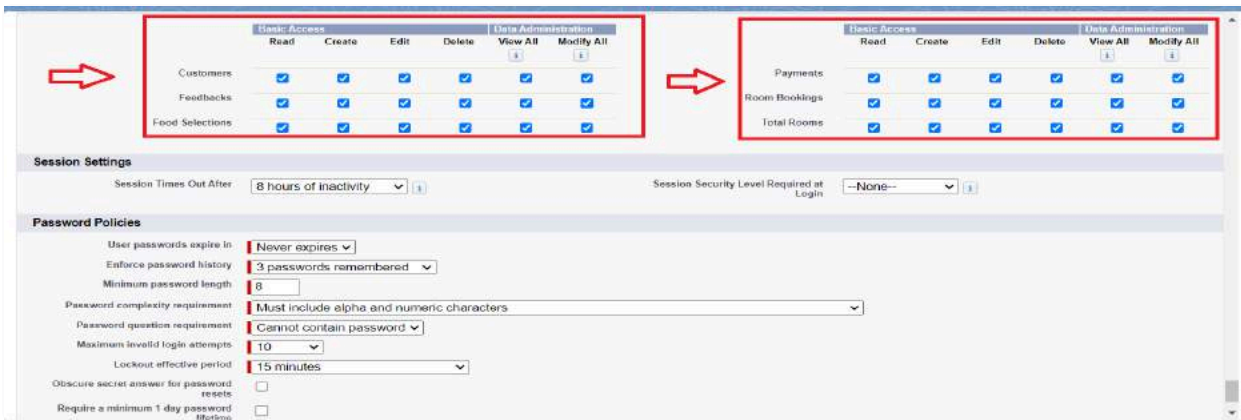
Step 2 : Enter profile name (Custom User) > Save.

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 :

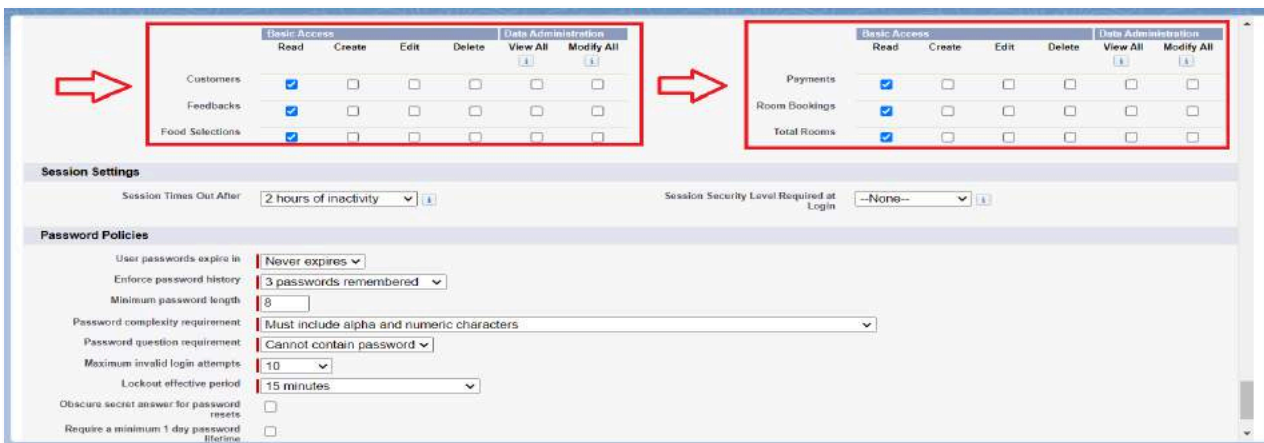
Step 1 : Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard platform User)

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.

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

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

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.

Search Setup

Setup Home Object Manager

role

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

Executive Staff

CEO President CFO VP, Sales

View & edit data, roll up forecasts, & generate reports for all users below for all users below. Can't access data of other Executive Staff.

Western Sales Director

Director of W. Sales

Eastern Sales Director

Director of E. Sales

International Sales Director

Director of Int'l Sales

View & edit data, roll up forecasts, & generate reports for all users directly below. Can't access data of users above or at same level.

Western Sales Rep

CA Sales Rep

OR Sales Rep

Eastern Sales Rep

NY Sales Rep

MA Sales Rep

International Sales Rep

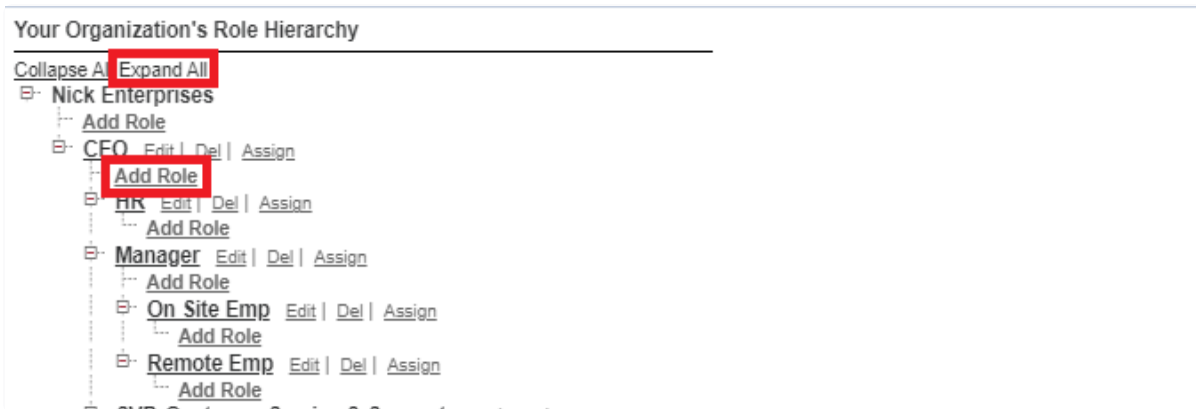
Asian Sales Rep

European Sales Rep

View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or at same level.

Set Up Roles

Don't show this page again



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

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.

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

Task 10 : Creating Users

USER 1 : " Sandeep Gujja "

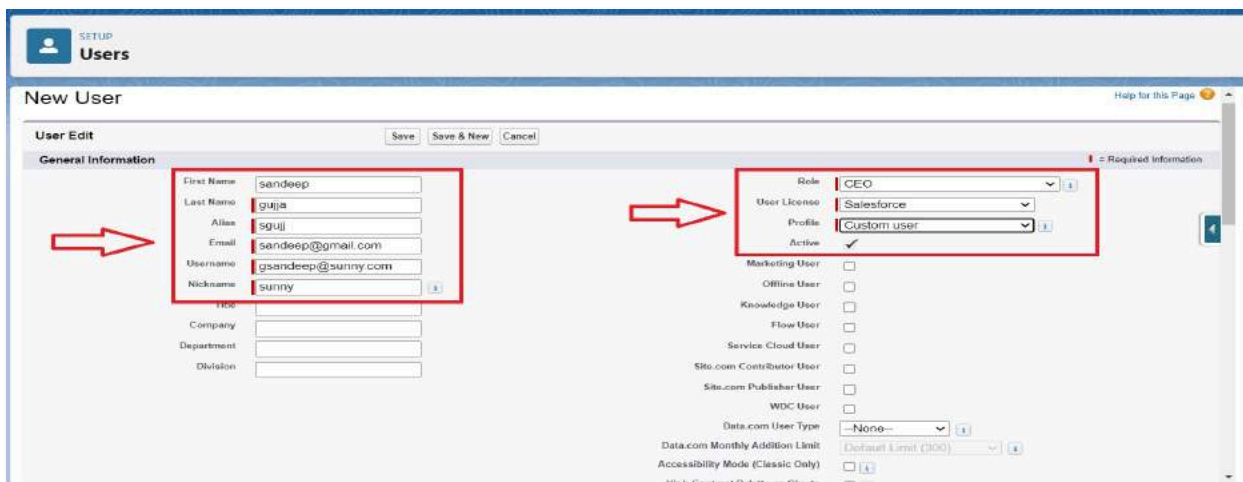
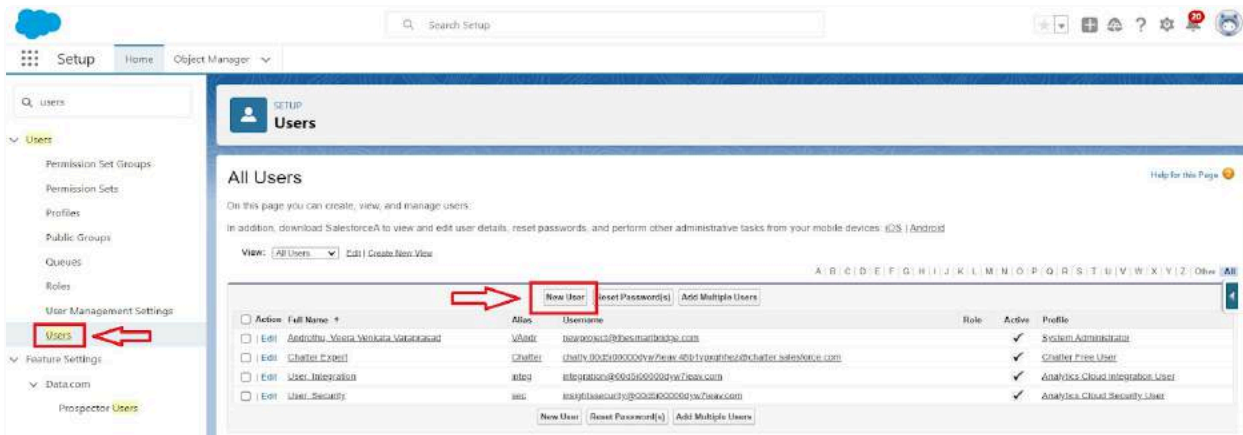
To create a User follow these below steps :

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

The screenshot shows the 'User Edit' page for 'Abhilash Garapati' in the Salesforce 'Users' setup area. The page is divided into two main sections: 'General Information' on the left and 'Role' on the right. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' section contains fields for Role, User License, Profile, and Active status, along with a list of user types and their corresponding checkboxes. Red arrows point to the 'Save' button at the top and the 'Role' section on the right. The 'Save' button is highlighted with a red box. The 'Role' section is also highlighted with a red box. The 'General Information' section is highlighted with a red box. The 'Role' section is highlighted with a red box. The 'General Information' section is highlighted with a red box. The 'Role' section is highlighted with a red box.

User Edit	
abhilash garapati	
Save Save & New Cancel	
General Information	
First Name	Abhilash
Last Name	garapati
Alias	agara
Email	abhi@gmail.com
Username	gabhi@tech.com
Nickname	abhi
Title	
Company	
Department	
Division	
Role	
Role	Marketing
User License	Salesforce Platform
Profile	Customer Platform user1
Active	<input checked="" type="checkbox"/>
Marketing User <input type="checkbox"/>	
Offline User <input type="checkbox"/>	
Knowledge User <input type="checkbox"/>	
Flow User <input type="checkbox"/>	
Service Cloud User <input type="checkbox"/>	
Site.com Contributor User <input type="checkbox"/>	
Site.com Publisher User <input type="checkbox"/>	
WDC User <input type="checkbox"/>	
Data.com User Type	--None--
Data.com Monthly Addition Limit	300
Accessibility Mode (Classic Only) <input type="checkbox"/>	

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

The screenshot shows the Salesforce 'New User' setup page. The left sidebar contains navigation links for 'Users', 'User Management Settings', 'Feature Settings', and 'User Interface'. The main content area is titled 'New User' and includes a 'User Edit' section with a 'Save' button highlighted by a red box and an arrow. Below this, the 'General Information' section contains fields for First Name (Ganesh), Last Name (gelli), Alias (gelli), Email (ganesh@gmail.com), Username (ganeshg@tech.com), and Nickname (gani), all of which are enclosed in a red box with an arrow pointing to it. To the right, the 'Role' dropdown is set to 'Receptionist', 'User License' is 'Salesforce Platform', and 'Profile' is 'Custom Platform user2', all highlighted by a red box with an arrow. Other fields like 'Active' (checked), 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Data.com User Type' (None), 'Data.com Monthly Addition Link' (Default Limit (2000)), and 'Accessibility Mode' (Classic Only) are also visible.

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

The screenshot illustrates the process of creating a new customer record in a Salesforce-like system. The interface includes a top navigation bar with a search bar and a left sidebar with a menu. The main content area shows the 'Customers' tab selected, with a 'New' button highlighted. Below this, the 'New Customer1' form is displayed, featuring fields for 'Customer Name', 'Phone no', 'Email id', 'Owner', 'Permanent Address', and 'current Status'. The 'Save' button at the bottom is also highlighted.

Setup Home Object Manager

Search Setup

Apps

Co-Living

Home Feels Customers Room Bookings Payments Food Selections Feedbacks Reports Dashboards

Customers Recently Viewed

5 items • Updated a few seconds ago

Search this list...

New Import Change Owner

Customer Name

New Customer1

* = Required Information

Information

* Customer Name

Text

* Phone no

9702874232

Email id

tech@gmail.com

Owner

Veera Venkata Varaprasad Androthu

* Permanent Address

Hyderabad

* current Status

Employee

Cancel Save & New Save

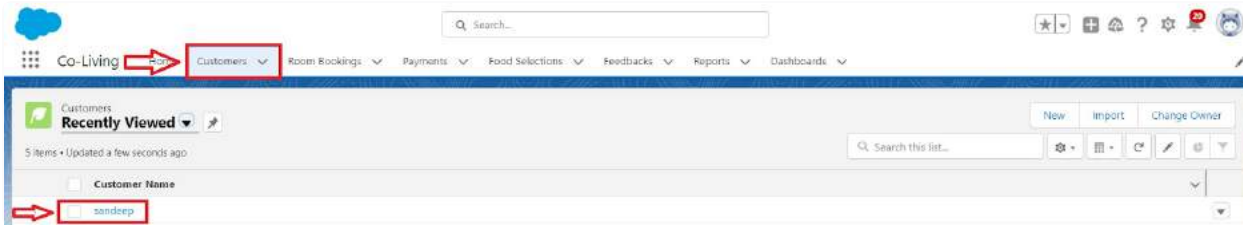
Record 2. Viewing Record " Customers "

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 "

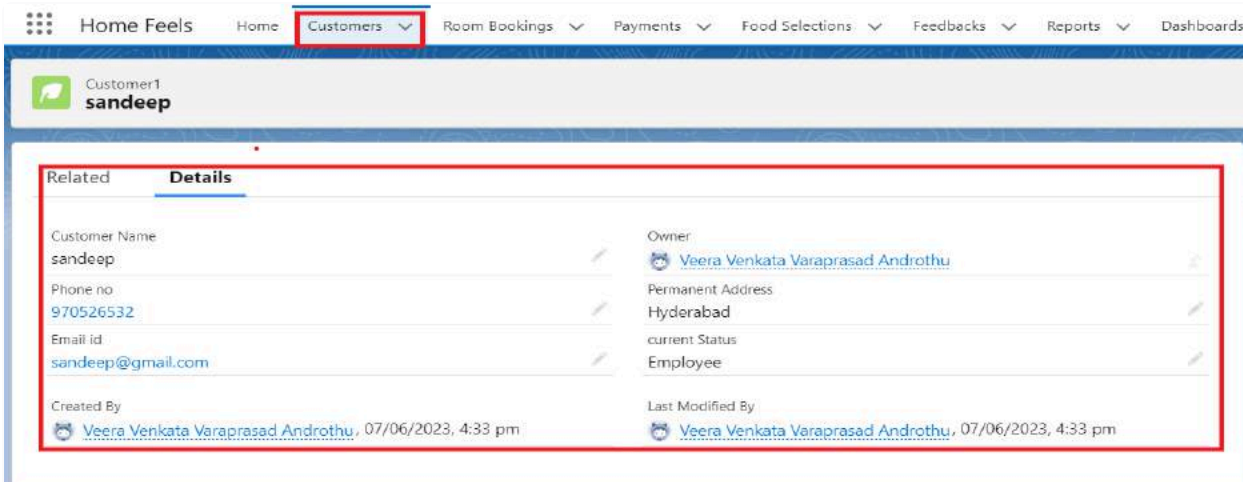
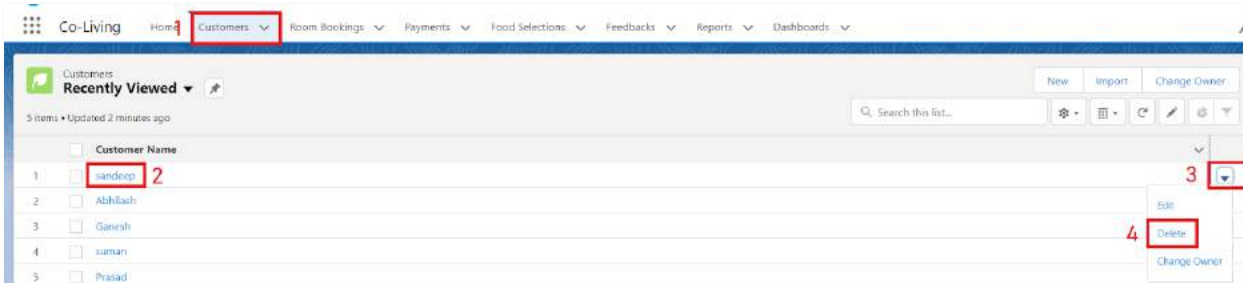
Step 1 : Click on App Launcher on the left side of the screen.

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

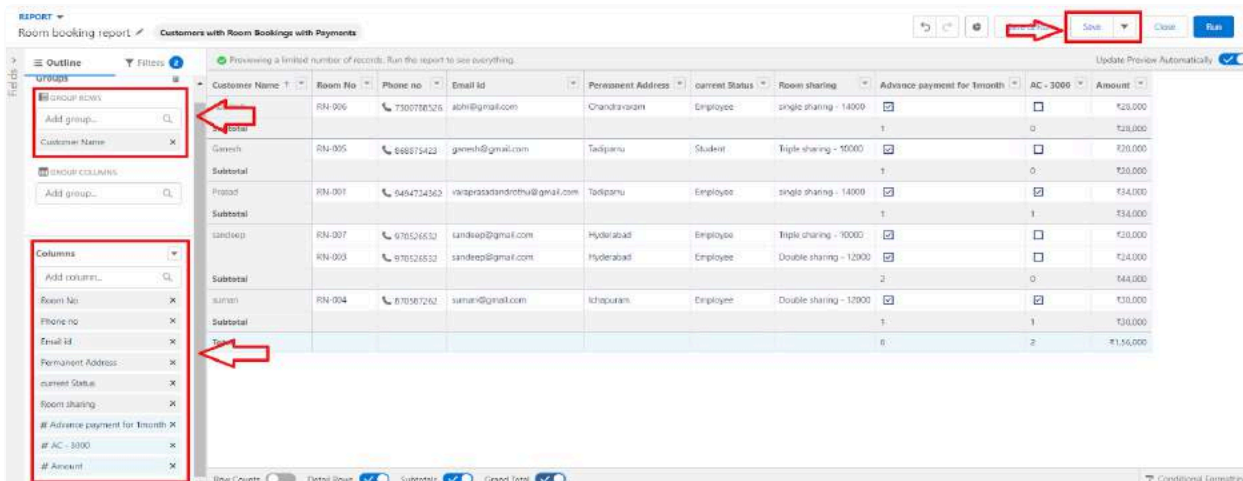
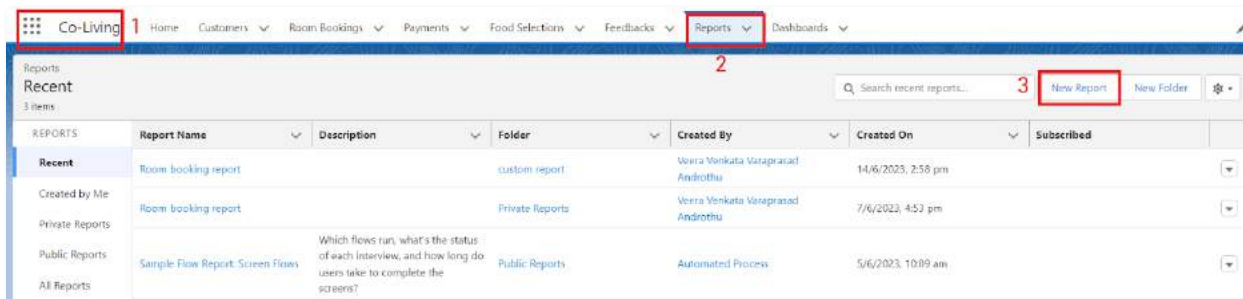
Step 2 : Click New Report.

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 "

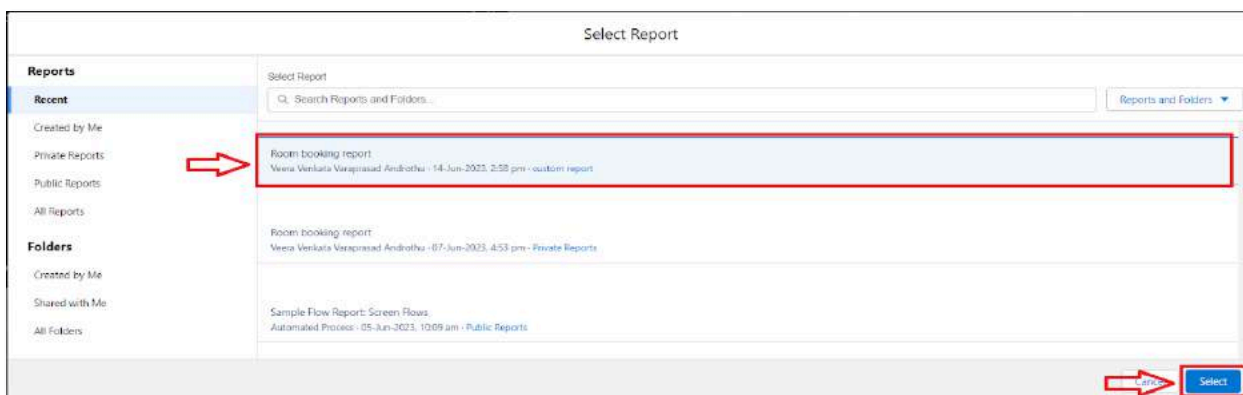
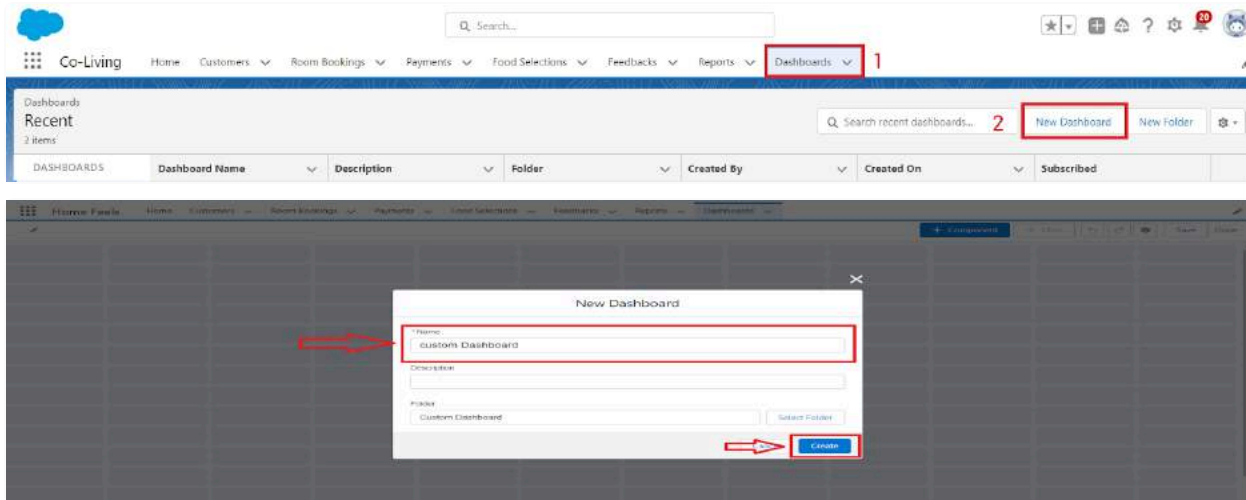
Step 1 : Go to the app > click on the Dashboard tabs and click on new Dashboard

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.

The screenshot displays the Salesforce Setup interface. At the top, the 'Setup' tab is selected. A search bar contains the text 'flows'. In the left sidebar, under 'Process Automation', the 'Flows' option is highlighted. The main content area shows the 'Flows' page with a table of existing flows. A 'New Flow' button is visible in the top right corner. Below the table, the 'New Flow' wizard is shown, with the 'Record-Triggered Flow' option selected and highlighted. The 'Create' button at the bottom right is also highlighted.

Flow Label	Process Type	Activated	Tested	Package State	Package	Last Modified By	Last Modified
Ac Amount update	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Veera Venkata Varaprasad Andorhu	07/06/2023, 11:35 am
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

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**
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

Configure Start

Select Object

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

* Object
Room Booking 1

Configure Trigger

* Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated 2

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
None

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

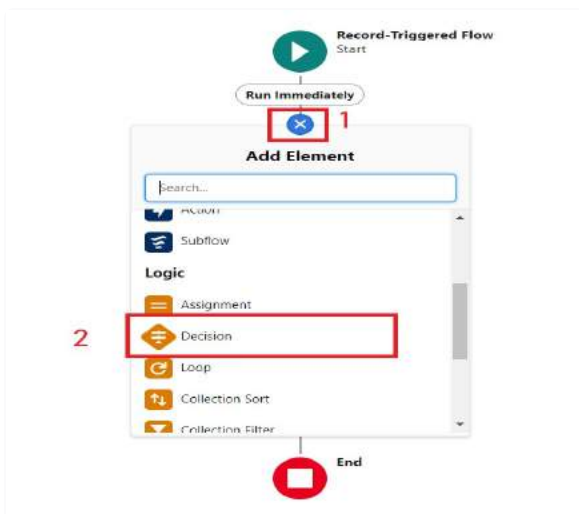
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database. 3

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed.

Cancel Done 4

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.

The screenshot shows the 'New Decision' form. At the top, the 'Label' is 'Field Should be Update' and the 'API Name' is 'Field_Should_be_Update'. Below this is the 'Outcomes' section. On the left, under 'OUTCOME ORDER', there is a list with 'Single Sharing' and a '+' button next to it. The 'Single Sharing' item is highlighted with a red box and a '4'. The main area is 'OUTCOME DETAILS' for 'Single Sharing'. It has a 'Label' 'Single Sharing' and an 'Outcome API Name' 'Single_Sharing'. Below this is a dropdown for 'Condition Requirements to Execute Outcome' set to 'All Conditions Are Met (AND)'. There are two conditions listed: 1. Resource: '\$Record > Room sharing', Operator: 'Equals', Value: 'single sharing'. 2. Resource: '\$Record > AC - 3000', Operator: 'Equals', Value: 'False'. Both conditions are highlighted with a red box and a '3'. There is an 'Add Condition' button at the bottom left and 'Cancel'/'Done' buttons at the bottom right.

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.

The screenshot shows the 'New Decision' form. On the left, under 'OUTCOME ORDER', there is a list with 'Single Sharing' and 'Double sharing'. The 'Double sharing' item is highlighted with a red box and a '3'. The main area is 'OUTCOME DETAILS' for 'Double sharing'. It has a 'Label' 'Double sharing' and an 'Outcome API Name' 'Double_sharing'. Below this is a dropdown for 'Condition Requirements to Execute Outcome' set to 'All Conditions Are Met (AND)'. There are two conditions listed: 1. Resource: '\$Record > Room sharing', Operator: 'Equals', Value: 'Double sharing'. 2. Resource: '\$Record > AC - 3000', Operator: 'Equals', Value: 'False'. Both conditions are highlighted with a red box and a '2'. There is an 'Add Condition' button at the bottom left and a 'Delete Outcome' button at the top right.

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.

The screenshot shows the 'OUTCOME ORDER' list on the left with a '+' button highlighted by a red box and the number '3'. The 'OUTCOME DETAILS' form is open, with a red box and the number '1' around the 'Label' and 'Outcome API Name' fields. The 'Label' field contains 'Triple Sharing' and the 'Outcome API Name' field contains 'Triple_Sharing'. Below this, a dropdown menu for 'Condition Requirements to Execute Outcome' is set to 'All Conditions Are Met (AND)', with a red box and the number '2' around it. The 'Conditions' section contains two rows. The first row has 'Resource' as '\$Record > Room sharing', 'Operator' as 'Equals', and 'Value' as 'Triple sharing'. The second row is preceded by an 'AND' operator and has 'Resource' as '\$Record > AC - 3000', 'Operator' as 'Equals', and 'Value' as 'False'. A 'Delete Outcome' button is in the top right corner.

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.

The screenshot shows the 'OUTCOME ORDER' list on the left with a '+' button highlighted by a red box and the number '3'. The 'OUTCOME DETAILS' form is open, with a red box and the number '1' around the 'Label' and 'Outcome API Name' fields. The 'Label' field contains 'Single Ac' and the 'Outcome API Name' field contains 'Single_Ac'. Below this, a dropdown menu for 'Condition Requirements to Execute Outcome' is set to 'All Conditions Are Met (AND)', with a red box and the number '2' around it. The 'Conditions' section contains two rows. The first row has 'Resource' as '\$Record > Room sharing', 'Operator' as 'Equals', and 'Value' as 'single sharing'. The second row is preceded by an 'AND' operator and has 'Resource' as '\$Record > AC - 3000', 'Operator' as 'Equals', and 'Value' as '(\$GlobalConstant.True)'. A 'Delete Outcome' button is in the top right corner.

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.

The screenshot shows the 'New Decision' form with the 'OUTCOME ORDER' list on the left and 'OUTCOME DETAILS' on the right. A red box labeled '1' highlights the 'OUTCOME DETAILS' section, which includes fields for 'Label' (Double Ac) and 'Outcome API Name' (Double_Ac). Below this, a dropdown menu shows 'All Conditions Are Met (AND)'. A red box labeled '2' highlights the 'Condition Requirements to Execute Outcome' section, which contains two conditions: 'Resource: \$Record > Room sharing' with 'Operator: Equals' and 'Value: Double sharing', and 'AND \$Record > AC - 3000' with 'Operator: Equals' and 'Value: \$GlobalConstant.True'. A red box labeled '3' highlights the 'OUTCOME ORDER' list on the left, which includes 'Single Sharing', 'Double sharing', 'Triple Sharing', 'Single Ac', 'Double Ac', and 'Default Outcome'.

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.

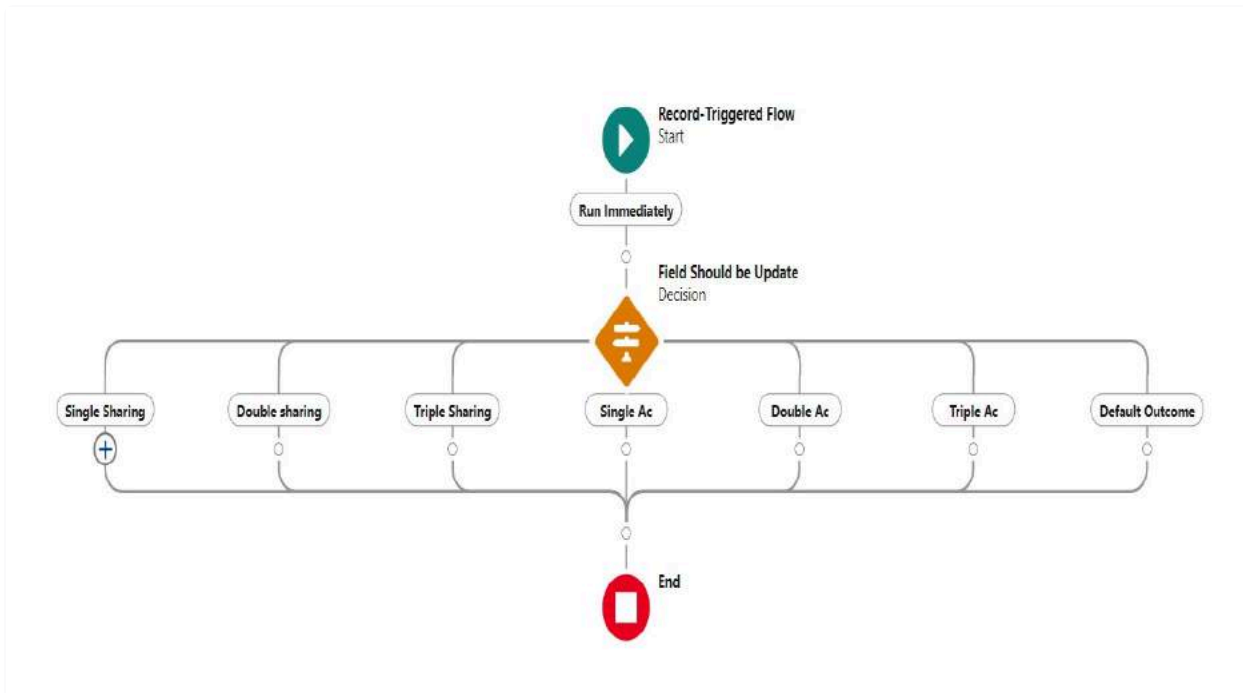
Step 1 : Click on “Add Condition”

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

Step 1 : Click on Done.

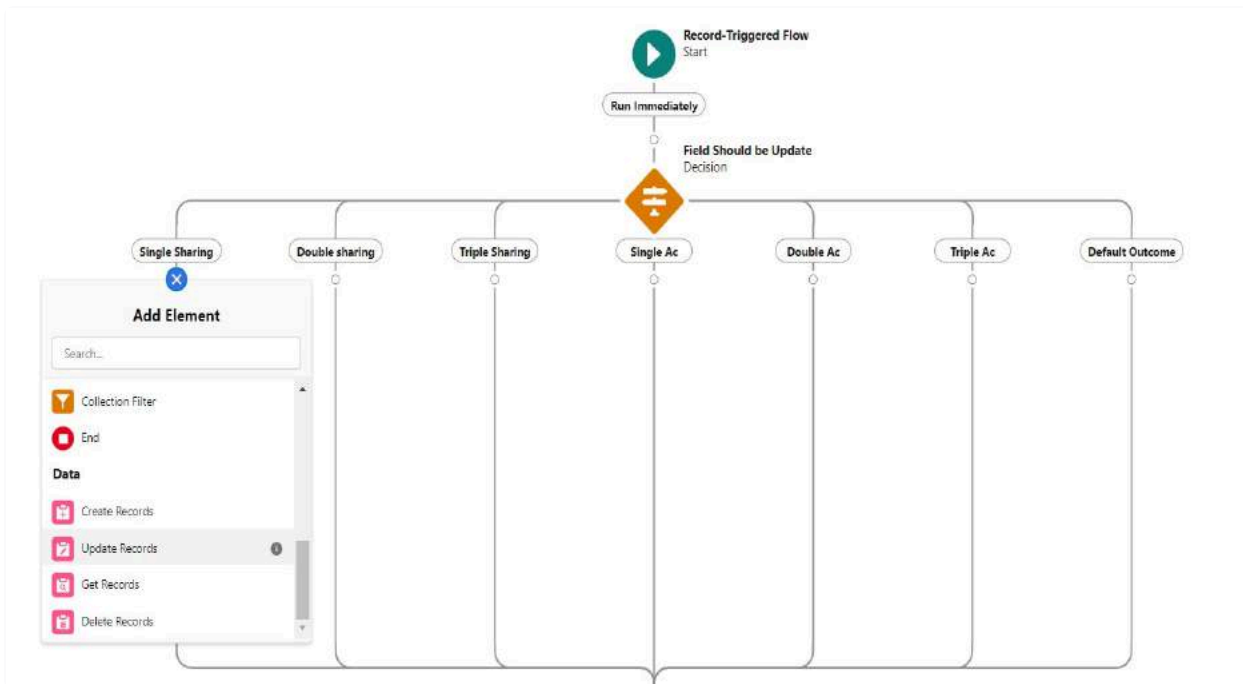
The screenshot shows the 'New Decision' form with the 'OUTCOME ORDER' list on the left and 'OUTCOME DETAILS' on the right. A red box labeled '1' highlights the 'OUTCOME DETAILS' section, which includes fields for 'Label' (Triple Ac) and 'Outcome API Name' (Triple_Ac). Below this, a dropdown menu shows 'All Conditions Are Met (AND)'. A red box labeled '2' highlights the 'Condition Requirements to Execute Outcome' section, which contains two conditions: 'Resource: \$Record > Room sharing' with 'Operator: Equals' and 'Value: Triple sharing', and 'AND \$Record > AC - 3000' with 'Operator: Equals' and 'Value: True'. A red box labeled '3' highlights the 'OUTCOME ORDER' list on the left, which includes 'Single Sharing', 'Double sharing', 'Triple Sharing', 'Single Ac', 'Double Ac', 'Triple Ac', and 'Default Outcome'. At the bottom right, there are 'Cancel' and 'Done' buttons.

- 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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label

single

* API Name

single

Description


* How to Find Records to Update and Set Their Values

☒ Use the room booking record that triggered the flow

☐ Update records related to the room booking record that triggered the flow

☐ Use the IDs and all field values from a record or record collection

☐ Specify conditions to identify records, and set fields individually


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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

Set Field Values for the Room Booking Record

Field	Value
Amount__c	← 28000 

Cancel

Done

66

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.

Edit Update Records

Update Salesforce records using values from the flow.

*Label

Double

*API Name

Double

Description


* How to Find Records to Update and Set Their Values

☒ Use the room booking record that triggered the flow

☐ Update records related to the room booking record that triggered the flow

☐ Use the IDs and all field values from a record or record collection

☐ Specify conditions to identify records, and set fields individually

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record


Field

Amount__c

←

Value

24000



+ Add Field

Cancel

Done

67

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.

Edit Update Records

Update Salesforce records using values from the flow.

*Label

Triple

*API Name

Triple

Description


* How to Find Records to Update and Set Their Values

☒ Use the room booking record that triggered the flow

☐ Update records related to the room booking record that triggered the flow

☐ Use the IDs and all field values from a record or record collection

☐ Specify conditions to identify records, and set fields individually


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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

Set Field Values for the Room Booking Record

Field		Value	
Amount__c	←	20000	
<div>+ Add Field</div>			

Cancel

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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label

single ac1

* API Name

single_ac1

Description


* How to Find Records to Update and Set Their Values

☒ Use the room booking record that triggered the flow

☐ Update records related to the room booking record that triggered the flow

☐ Use the IDs and all field values from a record or record collection

☐ Specify conditions to identify records, and set fields individually


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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field		Value	
Amount_c	←	34000	
<div>+ Add Field</div>			

Cancel

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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label

Double ac1

* API Name

Double_ac1

Description

* How to Find Records to Update and Set Their Values

☒ Use the room booking record that triggered the flow

☐ Update records related to the room booking record that triggered the flow

☐ Use the IDs and all field values from a record or record collection

☐ Specify conditions to identify records, and set fields individually

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field

Amount_c

Value

← 30000

+ Add Field

Cancel

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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label

Triple ac1

* API Name

Triple_ac1

Description


* How to Find Records to Update and Set Their Values

☒ Use the room booking record that triggered the flow

☐ Update records related to the room booking record that triggered the flow

☐ Use the IDs and all field values from a record or record collection

☐ Specify conditions to identify records, and set fields individually


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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

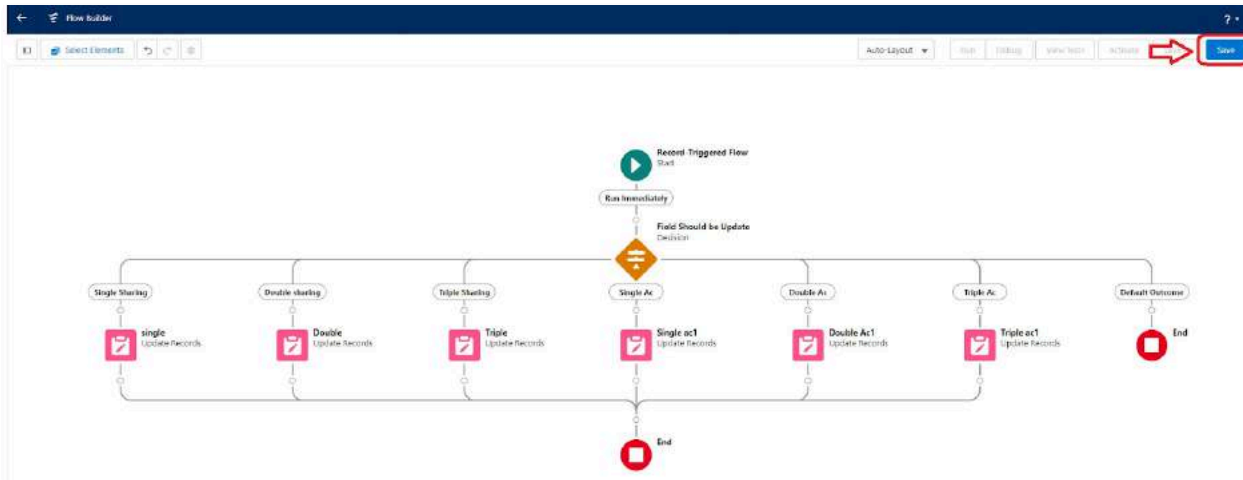
Set Field Values for the Room Booking Record

Field		Value	
Amount__c	←	26000	
<div>+ Add Field</div>			

Cancel

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.

1

Save the flow

* Flow Label

Update Amount Field

* Flow API Name

Update_Amount_Field

Description

Show Advanced

2

Cancel

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.

The first screenshot shows the app launcher with 'Setup' selected. A search bar contains 'co-living'. The 'Co-Living' app is highlighted. The second screenshot shows the 'Co-Living' app interface. The 'Room Bookings' tab is selected. The 'New' button is highlighted. Below the screenshots is a form titled 'New Room Booking'.

New Room Booking

* = Required Information

Information

Room No

* Name
Prasad

* Room sharing
Double sharing - 12000

AC - 3000
☒

Advance payment for 1month
☒

Amount

Cancel Save & New Save

The screenshot displays the 'Co-Living' application interface. The top navigation bar includes links for Home, Customers, Room Bookings (selected), Payments, Food Selections, Feedbacks, Reports, and Dashboards. Below the navigation bar, the header shows 'Room Booking RN-008'. The main content area is divided into 'Related' and 'Details' tabs, with 'Details' being the active tab. The details section contains several fields: 'Room No' (RN-008), 'Name' (Prasad), 'Room sharing' (Double sharing - 12000), 'AC - 3000' (checked), 'Advance payment for 1month' (checked), and 'Amount' (₹30,000). The 'Amount' field is highlighted with a red box. At the bottom, the 'Created By' and 'Last Modified By' fields both show 'Veera Venkata Varaprasad Androthu, 19/06/2023, 12:37 pm'.

Field	Value
Room No	RN-008
Name	Prasad
Room sharing	Double sharing - 12000
AC - 3000	<input checked="" type="checkbox"/>
Advance payment for 1month	<input checked="" type="checkbox"/>
Amount	₹30,000
Created By	Veera Venkata Varaprasad Androthu, 19/06/2023, 12:37 pm
Last Modified By	Veera Venkata Varaprasad Androthu, 19/06/2023, 12:37 pm

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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