

A CRM Application to Manage the Booking of CoLiving

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

Features and Functionality:

1. Customer Management

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

2. Room Booking

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

3. Food Service

- **Daily Food Selection:** Users can select food items for each day of their stay.
- **Food Preferences:** Users can specify dietary restrictions or preferences (e.g., vegetarian, gluten-free).
- **Food Menu:** A menu of special food items will be available for users to select from.

4. Payment Management

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

5. Feedback and Review

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

6. Reporting and Analytics

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

7. Security and Access Control

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

8. Functionality

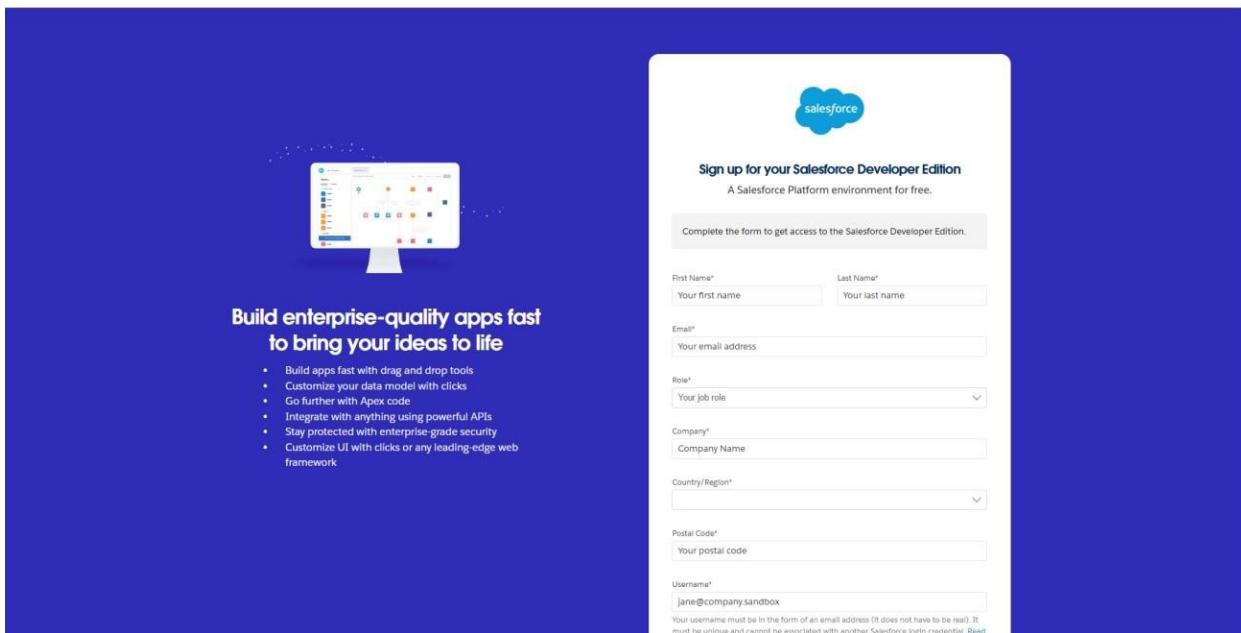
- **Search and Filter:** Users can search for available rooms by date, room type, and sharing options.
- **Booking Confirmation:** Once a booking is made, the user will receive a confirmation email with details of their booking.
- **Payment Reminders:** The application will send reminders to users for pending payments.

- **Feedback Notifications:** The application will send notifications to administrators when a user provides feedback.
- **Reporting and Analytics:** The application will generate reports and provide insights on customer behavior and preferences.

Milestone 1 - Introduction to Salesforce: What is Salesforce?

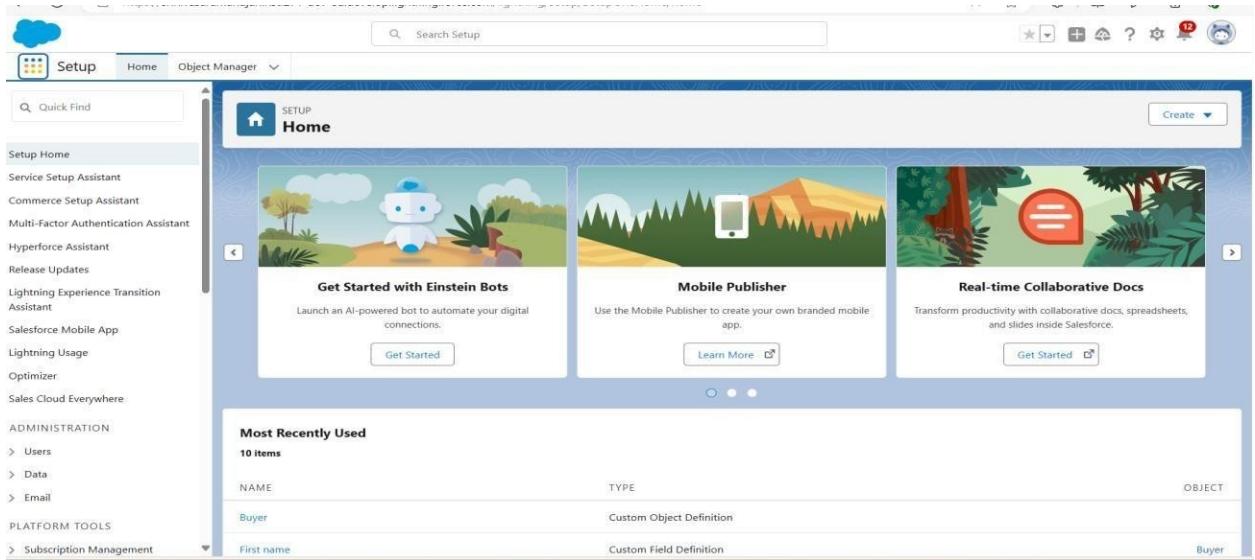
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate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

Activity 1: Creating Developer Account:



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

Activity 2: Account Activation:



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

Milestone 2 – Object

What Is an Object?

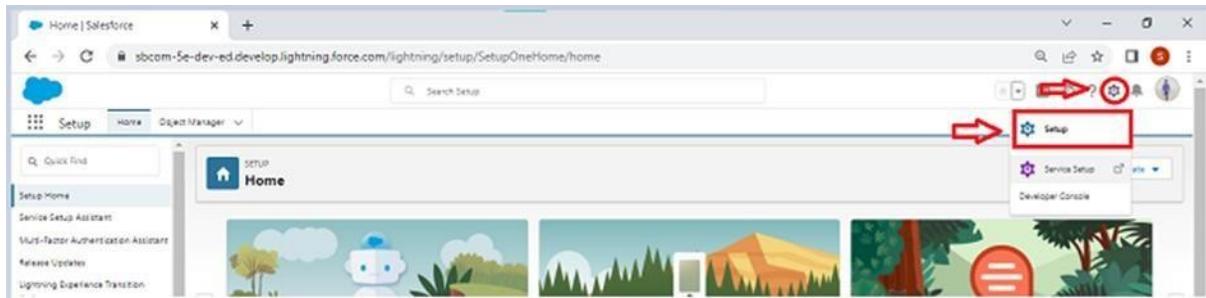
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

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

To Navigate to Setup page:

Click on gear icon ? click setup.



To create an object:

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



2. On the Customobject defining page:
3. Enter the labelname, and plural label name, click on Allow reports, and Allow search.

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and records.

Label: Example: Account
Plural Label: Example: Accounts

Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Contact sensitive Help setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content type:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name

Date Type: Text

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow Chatter Groups
- 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 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.

Save **Save & New** **Cancel**

4. Click on Save.

Activity 1: Create a custom object for Total Rooms

To create an object:

- From the setup page Click on Object Manager Click on Create Click on Custom Object..Enter the label name Supplier

- b. Plural label name? Suppliers
- c. Fill in the label as "Total Room".
- d. Fill in the plural label as "TotalRooms".
- e. Record name: "Total No Of Rooms"
- f. Select the data type as "Text".
- g. In the Optional Features section, select Allow Reports and Track Field History.
- h. In the Deployment Status section, ensure Deployed is selected.
- i. In the Search Status section, select Allow Search.
- j. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

The screenshot shows the 'New Custom Object' setup page in Salesforce. The page has a header 'SETUP' and 'New Custom Object'. It includes sections for 'Custom Object Definition Edit', 'Custom Object Information', and 'Enter Record Name Label and Format'. The 'Label' field contains 'Total Room' (marked with a red box labeled 1) and the 'Plural Label' field contains 'Total Rooms'. The 'Object Name' field contains 'Total_Rooms' (marked with a red box labeled 2). The 'Record Name' field contains 'Total No Of Rooms' (marked with a red box labeled 3) and the 'Data Type' dropdown is set to 'Text'. Other visible fields include 'Example: Account', 'Example: Accounts', 'Starts with vowel sound' (checkbox), 'Description' (text area), 'Context-Sensitive Help Setting' (radio buttons for standard help or Visualforce page), and 'Content Name' (dropdown menu).

- k. Leave everything else as is, and click Save.

Create a custom objects for Customers,Food Selection,RoomBooking



Setup > Object Manager

Customer1

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name Customer1_c
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label Customer1
Field Sets	Plural Label Customers
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	



Setup > Object Manager

Food Selection

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name Food_Selection_c
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label Food Selection
Field Sets	Plural Label Food Selections
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	

The screenshot shows the Salesforce Setup interface. At the top, there's a blue header bar with the Salesforce logo, a search bar containing "Search Setup", and various navigation icons. Below the header, the main menu shows "Setup" as the active tab, followed by "Home" and "Object Manager". The title bar of the main content area says "SETUP > OBJECT MANAGER" and "Room Booking".

The main content area has a sidebar on the left with a "Details" tab selected. The sidebar lists several configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

The main panel displays the "Details" section for the "Room Booking" object. It includes fields for Description, API Name (set to "Room_Booking__c"), Custom (with a checked checkbox), Singular Label (set to "Room Booking"), Plural Label (set to "Room Bookings"), and several checkboxes for reports, activities, field history, deployment status, help settings, and help window.

At the bottom right of the main panel, there are "Edit" and "Delete" buttons.

Milestone 3 - Tabs

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

Types of Tabs:

1. Custom Tabs :

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

2. Web Tabs :

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

3. Visualforce Tabs :

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

4. Lightning Component Tabs :

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

5. Lightning Page Tabs :

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

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

Activity 1: Creating a Tab Total

Rooms to create Tab:(Total

Rooms)

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

Custom Tabs

Action	Label	Tab style	Description
Edit / Del	Activities	Chess	Created to setup with student activity junction
Edit / Del	Addresses	Anytime	
Edit / Del	Categories	Chess piece	
Edit / Del	Custom3000	Journal	This tab is related to Hotel Reservation App
Edit / Del	Events	Anytime	
Edit / Del	Matrix	Phone	This tab is related to College Management System
Edit / Del	Order Details	Comments	
Edit / Del	Orders	Desk	
Edit / Del	Products	Computer	
Edit / Del	Rooms	Desk	
Edit / Del	Reservations	Highway sign	This tab is related to Hotel Reservation App
Edit / Del	Risk	Highway Signs	This tab is related to Hotel Reservation App
Edit / Del	Software	Anytime	
Edit / Del	Structure	Leaf	This tab is related to College Management System

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object: Total Room

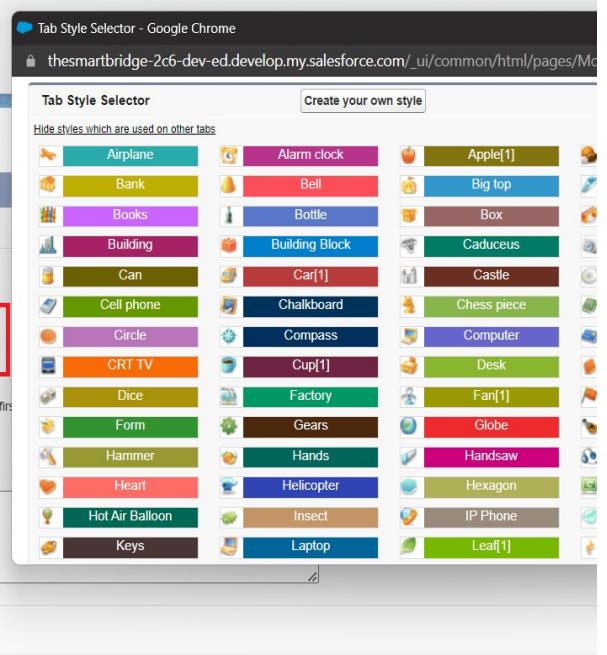
Tab Style: Keys

(Optional) Choose a Home Page Custom Link to show as a splash page the first time a user logs in.

Splash Page Custom Link: None

Enter a short description.

Description:



Select Object(Total Rooms)> Select the tab style

Next (Add to profilespage) keep it as default

Next (Add to CustomApp) keep it as default & Save.

(Customers)

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

2. Select Object(Customers) > Select the tab style> Next (Add to profiles page) keep it asdefault> Next (Add to CustomApp) keep it as default > Save.

To create a Tab for Room Bookings

To createa Tab:(Room Bookings)

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

Create a Tabs For Remaining Objects

Now createthe tabs for Payments, Food Selections, Feedbacks Objects.

Milestone 4 - The LightningApp

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightningapps give your users access to sets of objects,tabs, and other items all inone convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Activity 1: To create a lightning app page:

App Name	Developer Name	Description	Last Modified	App Type	
All Tabs	Artisan	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	
Analytics Studio	Insights	Discover and manage business solutions designed for your industry	04/12/2022, 10:13 am	Classic	
App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	
Box Solutions	Lightning
Box	The Salesforce.com-Box mobile app lets you access Box data on the go. Use it to view files	28/12/2022, 4:05 pm	Connected (Managed)	
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected	28/12/2022, 4:05 pm	Connected (Managed)	
Chatter Mobile for BlackBerry	ChatterForBlackBerry	Chatter Mobile for BlackBerry	28/12/2022, 4:05 pm	Connected (Managed)	
College Management System	hassean	demo app	08/12/2022, 4:18 pm	Lightning	
Community	Community	Salesforce CRM Community	04/12/2022, 10:13 am	Classic	
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage records.	04/12/2022, 10:13 am	Lightning	

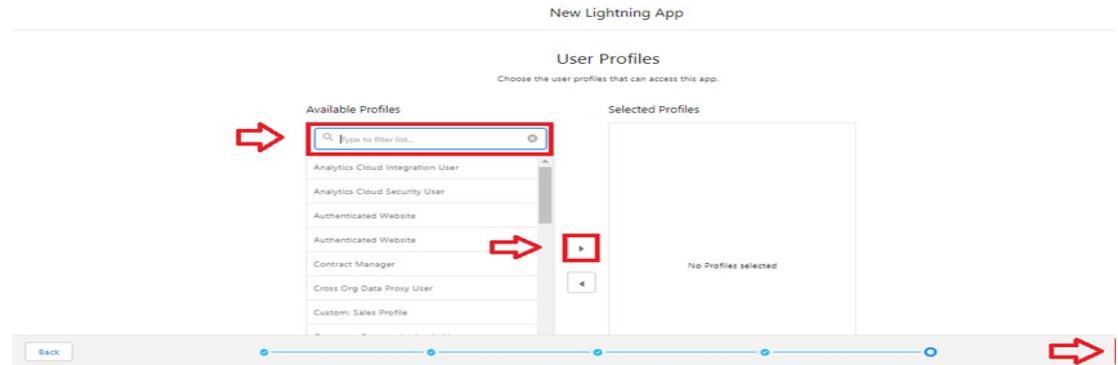
Go to setup page > search “app manager” in quick find > select “app manager” > click on Newlightning App.

1. Fill the app name in appdetails and branding > Next > (App optionpage)
2. keep it as default > Next
> (Utility Items) keep it as default > Next.

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.

Available Items		Selected Items	
1	2	3	4
Navigation Items	Type to filter list...		
Accounts		Home	
Alert Settings		Total Rooms	
All Sites		Customers	
Alternative Payment Methods		Room Bookings	
App Launcher		Payments	
Appointment Invitations		Food Selections	
Approval Requests		Feedbacks	
Asset Action Sources			
Asset Actions			
Asset State Periods			
Assets			

To Add User Profiles:



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

Milestone 5 – Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records becomes simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- ? CreatedBy
- ? Owner
- ? Last Modified
- ? FieldMade During objectCreation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organization or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Activity 1: Creation of fields for the customer1 object

1. To create fields in an object:

1. Go to setup > click on Object Manager > type object name (Customer1) in search bar > click on the object.
2. Now click on "Fields & Relationships" > New

Customer1

Fields & Relationships

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

Select Data Type as a "Phone"

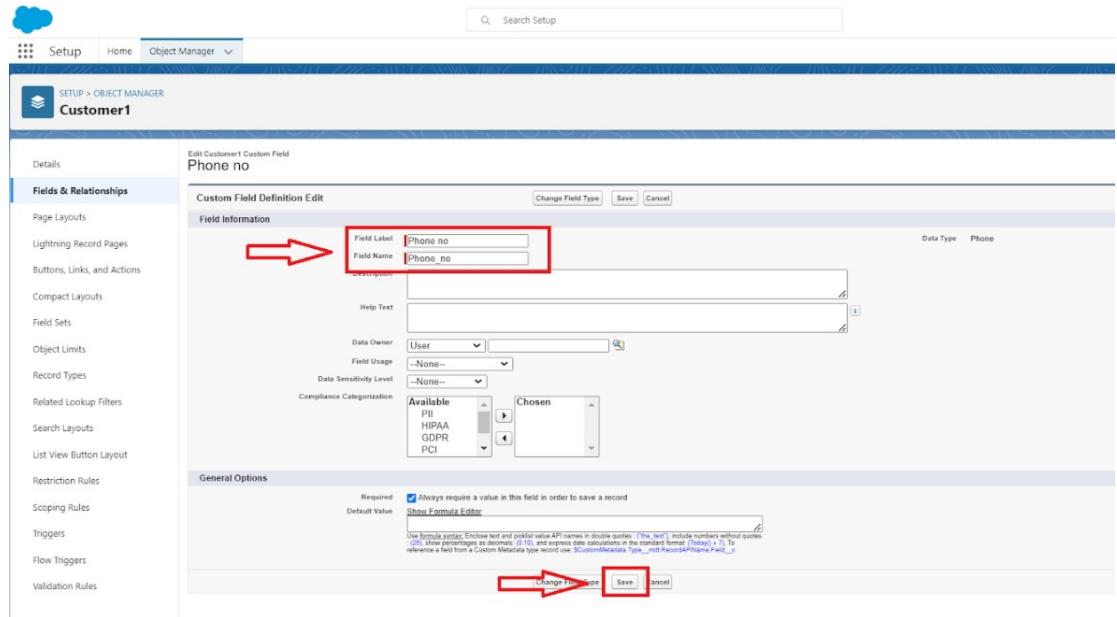
Customer1

Fields & Relationships

Phone

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

Click on next



Fill the Above as following:

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

2. To create another fields in an object:

1. Go to setup > click on Object Manager> type objectname(Customer1) in searchbar >clickon the object.
2. Now click on “Fields &Relationships” > New
3. Select Data type asa “Email” and Click on Next
4. Fillthe Above as following:

- a. Field Label>Email
- b. Field Name :It's gets auto generated
- c. Click on Next > Next > Save and new.

3. To create another fields in an object:

1. Go to setup > click on Object Manager> type objectname(Customer1) in searchbar >clickon the object

2. Now click on “Fields &Relationships” ? New
3. Select Data type as a “Text Area” and Click on Next
4. Fillthe Above as following:
 - a. Field Label: PermanentAddress
 - b. Field Name : It's gets auto generated
 - c. Click on Next > Next > Save and new.

4. To create another fields in an object:

1. Go to setup > click on Object Manager> type objectname(Customer1) in searchbar >clickon the object.
2. Now click on “Fields &Relationships” > New
3. Select Data type as a “Picklist” and Click on Next

Fill the Above as following: Field Label: CurrentStatus

Value - Select enter values with each value separated by a new line

- a. Student
- b. Employee
- c. Others
- Select required
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

Creation of fields for the Room Bookingobject

1. To create fields in an object:

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

SETUP > OBJECT MANAGER
Room Booking

Fields & Relationships

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
AC - 3000	AC__c	Checkbox	
Advance payment for 1month	Advance_payment_for_1month_c	Checkbox	
Amount	Amount_c	Currency(18, 0)	
Created By	CreatedBy	Lookup(User)	
Last Modified By	LastModifiedBy	Lookup(User)	
Name	Name_c	Master-Detail(Customer1)	
Room No	Name	Auto Number	

1. Select Data Type as a “Picklist”

2. Click on Next

SETUP > OBJECT MANAGER
Room Booking

Step 2. Enter the details

Field Label: Room Sharing 1

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

Single sharing
Double sharing
Triple sharing

Field Name: Room_Sharing 3

Description:

Help Text:

Required: Always require a value in this field in order to save a record 3

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

Default Value: Show Formula Editor

1. Fill the Above as following:

a. Field Label: Room Sharing

b. Value - Select enter values with each value separated by a new line

1. Single sharing

2. Double sharing

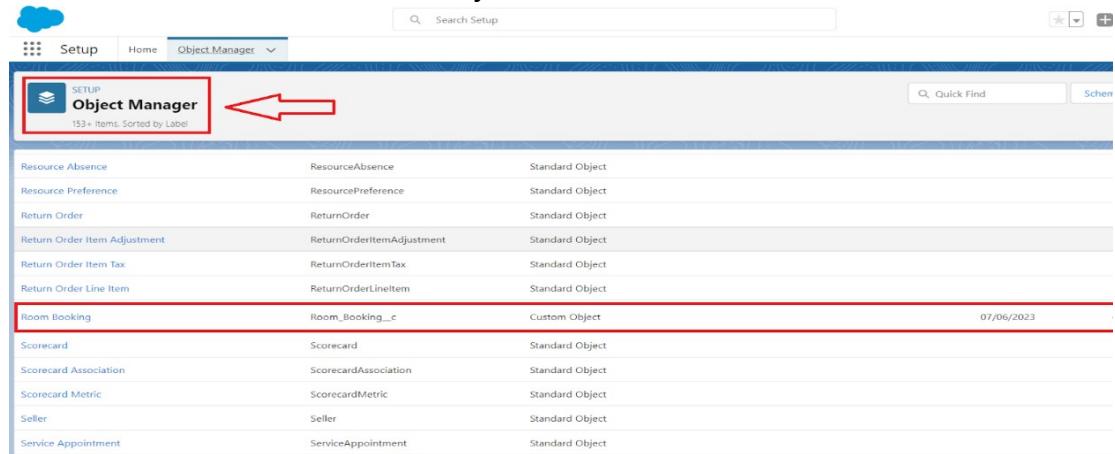
3. Triple sharing

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

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

To create fields & relationship to an object:

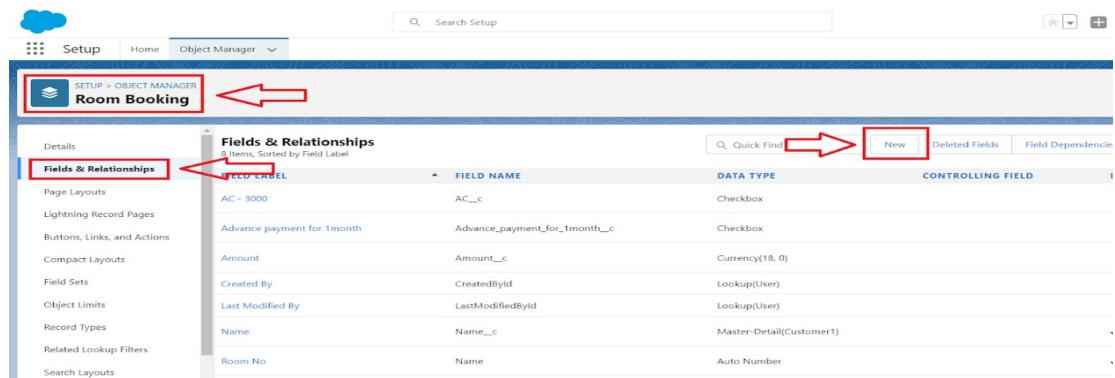
1. Go to setup > click on Object Manager > type objectname(Room Booking) in the search bar >click on the object.



The screenshot shows the Salesforce Object Manager interface. A red arrow points to the 'Object Manager' button in the top left corner. Below it, a red box highlights the 'Room Booking' row in the list, which is also underlined in red. The list includes various objects like Resource Absence, Resource Preference, and Service Appointment.

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

Now click on "Fields & Relationships" > New

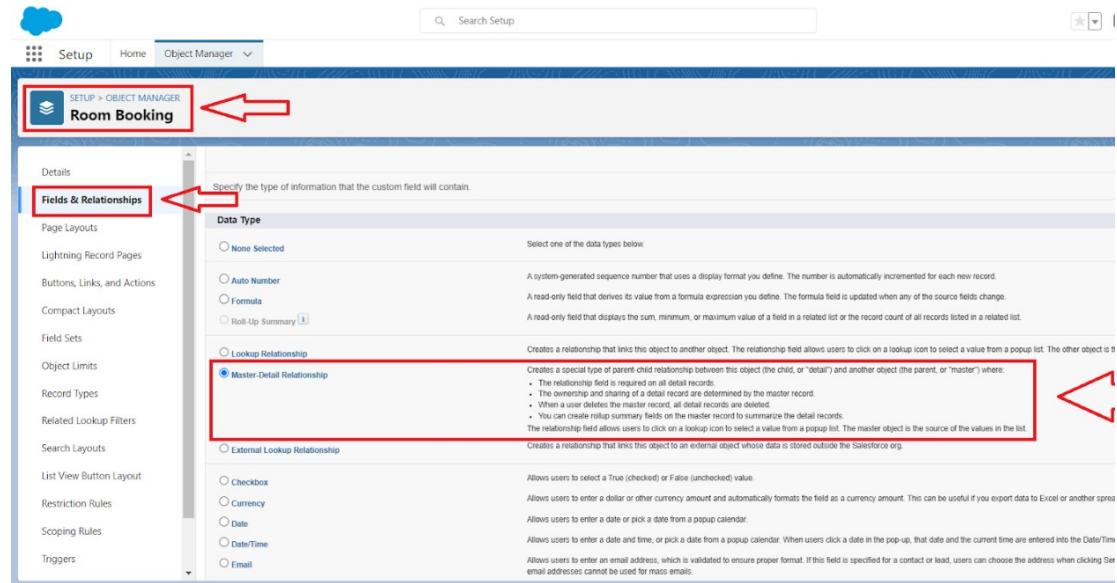


The screenshot shows the 'Fields & Relationships' page for the 'Room Booking' object. A red arrow points to the 'Room Booking' button in the top left corner. Another red arrow points to the 'Fields & Relationships' button in the sidebar. A third red arrow points to the 'New' button at the top right of the main table area. The table lists various fields with their field labels, names, data types, and controlling fields.

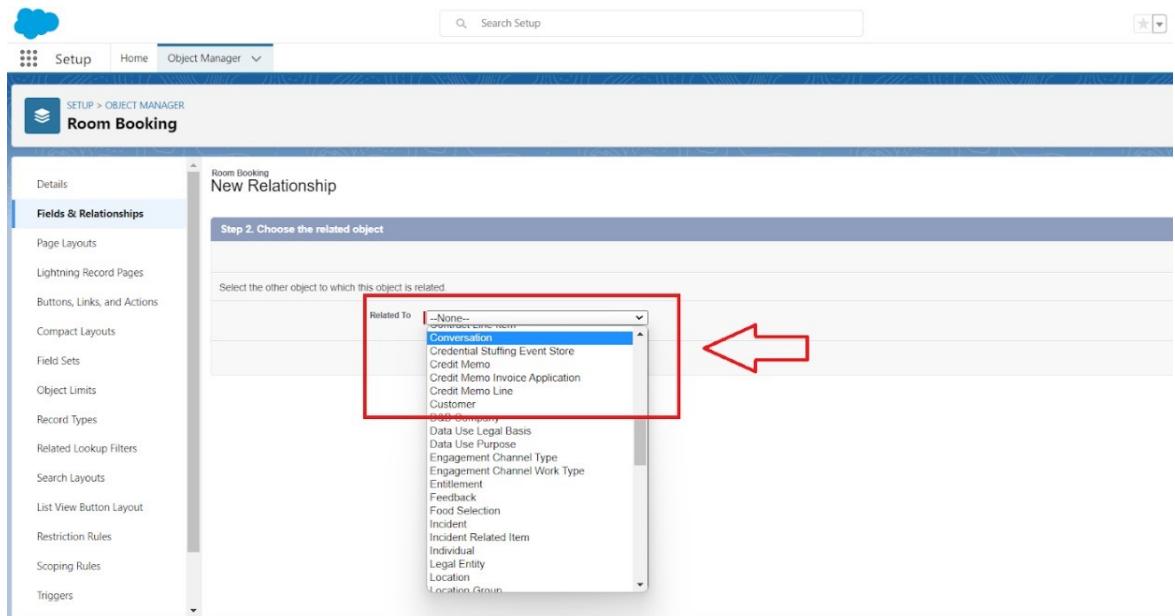
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
AC - 3000	AC__c	Checkbox	
Advance payment for 1month	Advance_payment_for_1month__c	Checkbox	
Amount	Amount__c	Currency(18, 0)	
Created By	CreatedBy	Lookup(User)	
Last Modified By	LastModifiedBy	Lookup(User)	
Name	Name__c	Master-Detail(Customer)	
Room No	Name	Auto Number	

Select Data Type as a "Master-detail Relationship"

Click on Next

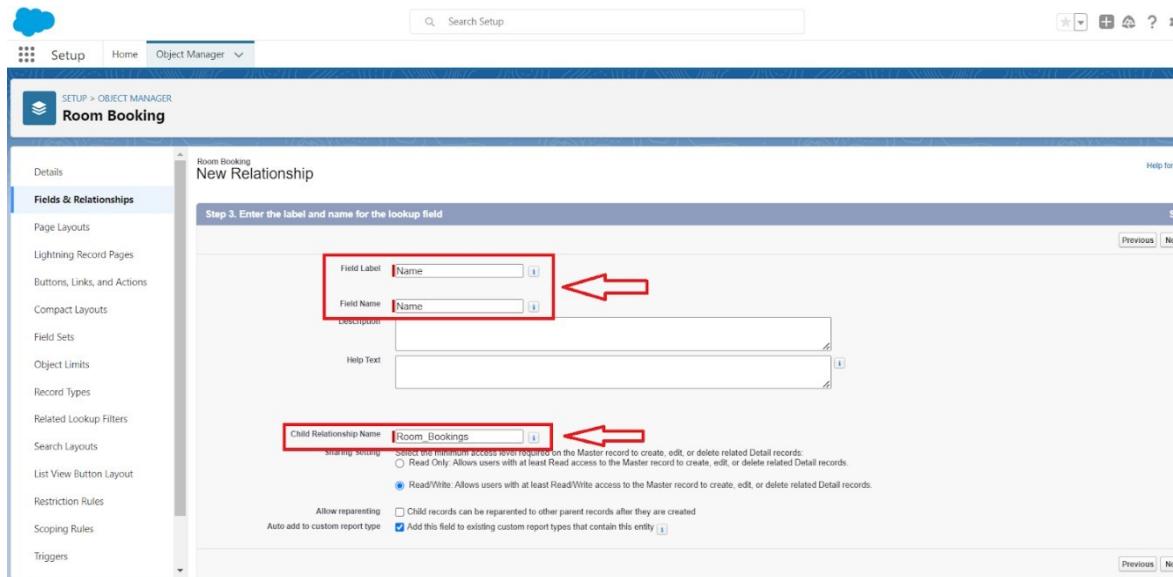


Click on the Related to drop down and Select the “Customer1” & Next.



Fill the Above as following:

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



- Click on Next > Next > Save and new.

3. To create fields in an object:

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

4. To create fields in an object:

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

3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fillthe Above as following:
 - Field Label: AdvancePayment for 1 Month
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new
5. **To create fieldsin an object:**
 1. Goto setup ? click on Object Manager ? type object name(Room Booking) in the search bar ?clickon the object.
 2. Now clickon “Fields &Relationships” ? New
 3. Select Data Type as a “Currency”
 4. Click on Next
 5. Fillthe Above as following:
 - Field Label: Amount
 - Length: (18,0)
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new
 6. **To Create a Fields & Relationship to an Object**
 1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.
 2. Now click on “Fields &Relationships” ? New
 3. Select Data Type as a “Master-detail Relationship”
 4. Click on Next
 5. Click on the Relatedto drop down and Select the “Total Rooms” objectand click on Next
 - Fillthe Above as following:

- Change the FieldLabel: Total No Of Rooms
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

7. To Create a Rollup Summary Field in “TotalRoom Object”

1. After Creatingthe Master- DetailRelationship Than Only you can create the Rollup Summary
2. Goto setup > click on Object Manager> type object name(Total Rooms)in the search bar > clickon the object.
3. Now clickon “Fields &Relationships” ? New
4. Select Data type as a“Roll-up Summary” and Click on Next
 - Fill the Above as following:
 - Field Label: Rooms Booked
 - Field Name :It's gets auto generated
 - Click on Next
5. Select the Room Bookings in the Summarized Object
Select the count Radio button in the select Roll-up Type

Total Room
New Custom Field

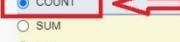
Help for this Page 

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object: Total Room
Summarized Object: Room Bookings 

Select Roll-Up Type

COUNT 
 SUM
 MIN
 MAX

Field to Aggregate: None

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

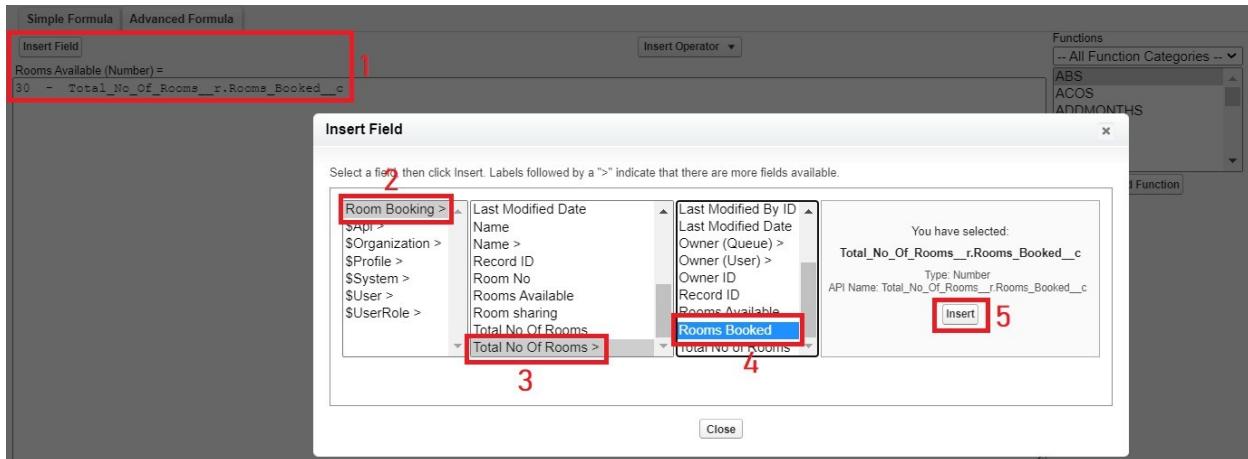
1. Click on Next > Next > Save and new

To create fields in an object:

1. Go to setup > click on Object Manager> type objectname(Rooms Booking) in the search bar >clickon the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type asa “Formula” and Click on Next

Fill the Above as following:

- FieldLabel:Rooms Available
- Field Name : It's gets auto generated
- Select the Formula Return Type as “Number”
- Select the Decimalplaces as “0” and Click onNext
- 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 inthe second Column and select the Room Booked in the third column and click on insert “ 30- Total_No_Of_Rooms_r.Rooms_Booked__c ” and Check Syntax



- Click on Next > Next > Save and new.

9. To create fields in an object:

1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Checkbox”
4. Click on Next

Fill the Above as following:

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

10. To create fields in an object:

1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Checkbox”
4. Click on Next

Fill the Above as following:

- Field Label: Check Out
- Field Name :It's gets auto generated

- Click on Next > Next > Save and new

Creation of Fields & Relationship for Payment1 Object

1. To create fields & relationship to an object:

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

The screenshot shows the Salesforce Setup page with the Object Manager selected. A red arrow points to the 'Payment1' object in the list. Another red arrow points to the 'Fields & Relationships' tab in the left sidebar. A third red arrow points to the 'New' button at the top right of the main table area. The table lists various fields with their field labels, names, data types, and controlling fields. Fields include Amount, Created By, Last Modified By, Name, Payment ID, Payment Mode, Payment no, and Room Booking.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Master-Detail(Customer1)		
Payment ID	Payment_ID_c	Number(18, 0)		
Payment Mode	Payment_Mode_c	Picklist		
Payment no	Name	Auto Number		
Room Booking	Room_Booking_c	Lookup(Room Booking)		

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

The screenshot shows the 'Specify the type of information that the custom field will contain' dialog. A red arrow points to the 'Fields & Relationships' tab in the left sidebar. Another red arrow points to the 'Master-Detail Relationship' option in the 'Data Type' section. A third red arrow points to the detailed description of the Master-Detail Relationship, which states: 'Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.' It also lists requirements: 'The master object must be a picklist or a formula field. The ownership and sharing of a detail record are determined by the master record.'

Click on Next

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

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: [None] Credit Memo Line Customer D&B Company Data Use Legal Basis Data Use Purpose Engagement Channel Type Engagement Channel Work Type Entitlement Feedback Food Selection Incident Incident Related Item

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

Field Label: Name
Field Name: Name
Description:
Help Text:
Sharing Setting: Selected the minimum access level required on the Master record to create, edit, or delete related Detail records:
Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting: Child records can be reparented to other parent records after they are created
Auto add to custom report type: Add this field to existing custom report types that contain this entity

1. Fill the Above as following:

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

2. To create another fields & relationship to an object

SETUP > OBJECT MANAGER
Payment1

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-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)		

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

Now click on “Fields & Relationships” > New

Select Data Type as a “LookupRelationship”

Click on Next

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

Data Type

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

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

The image consists of two screenshots of the Salesforce Setup interface, both titled "Payment1".

Screenshot 1: Step 2. Choose the related object

- The sidebar shows "Fields & Relationships" selected.
- The main area is titled "New Relationship".
- A dropdown menu under "Related To" is open, showing "Room Booking" as the selected option. A red box highlights this selection, and a red arrow points from it to the "Field Label" field in the next screenshot.
- Buttons at the bottom right include "Step 2", "Previous", "Next", and "Cancel".

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

- The sidebar shows "Fields & Relationships" selected.
- The main area is titled "Step 3. Enter the label and name for the lookup field".
- Fields filled in:
 - "Field Label": "Room Booking" (highlighted with a red box and a red arrow pointing from Screenshot 1).
 - "Field Name": "Room_Booking" (highlighted with a red box and a red arrow pointing from Screenshot 1).
 - "Child Relationship Name": "Payments1" (highlighted with a red box and a red arrow pointing from Screenshot 1).
- Required checkbox: "Always require a value in this field in order to save a record." (unchecked).
- Help Text: "What to do if the lookup record is deleted? Clear the value of this field. You can't choose this option if you make this field required." Don't allow deletion of the lookup record that's part of a lookup relationship.
- Auto add to custom report type: "Add this field to existing custom report types that contain this entity." (checked).
- Lookup Filter: "Optional. Create a filter to limit the records available to users in the lookup field." (link to "Show Filter Settings").
- Buttons at the bottom right include "Step 3 of 6", "Previous", "Next", and "Cancel".

.Fill the Above as following:

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

3. Creation of another fields for the Payment1 object

To create fields in an object:

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

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

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)		✓

Select Data Type as a “Picklist”

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

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

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

Field Label: **Payment Mode**

Value Set: **Cash
Credit card
Bank
Transfer**

Field Name: **Payment_Mode**

Help Text:

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

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

Default Value: **Show Formula Editor**

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. Debitcard
 5. UPI
 6. Phonepe
 7. Gpay
 8. Paytm
- Select required
- Click on Next > Next > Save and new.

Cross Object Formula Field:

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

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

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

4. Create a Cross object formula Field in Payment1Object

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

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)		✓

Select Data Type as a “Formula”

Click on Next

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

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”.

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

Data Type

None Selected Select one of the data types below.

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

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

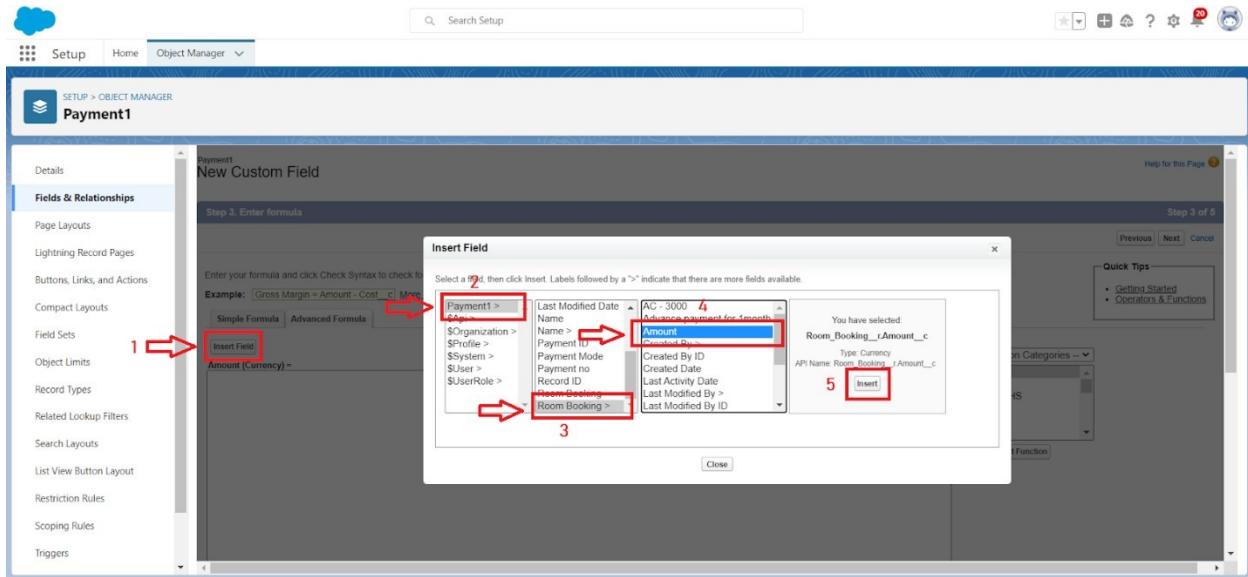
Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a 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 relationship field and 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.

Master-Detail Relationship 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.



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

Creation of fields for the Food Selection object

1. To create fields & relationship to an object:

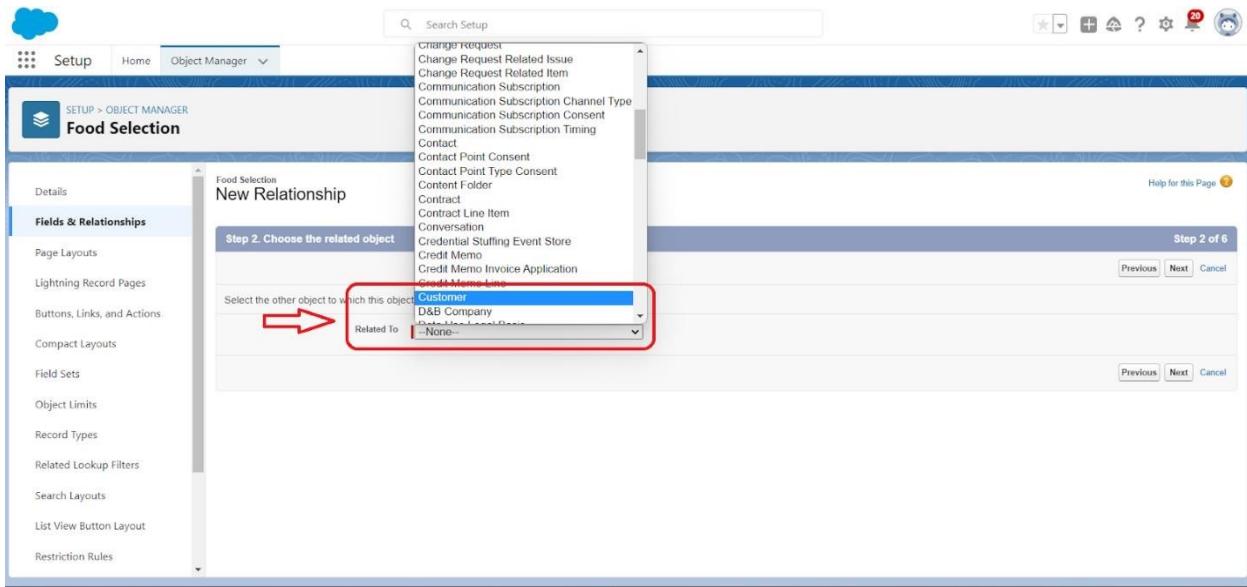
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > New

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Breakfast	Breakfast_c	Picklist		
Created By	CreatedById	Lookup(User)		
Dinner	Dinner_c	Picklist		
Food Selection No	Name	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Lunch	Lunch_c	Picklist		
Name	Name_c	Master-Detail(Customer1)		
Select Breakfast	Select_Breakfast_c	Picklist	Breakfast	
Select dinner	Select_dinner_c	Picklist	Dinner	

Select Data Type as a "Master-detail Relationship"

Click on Next

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



Fill the Above as following:

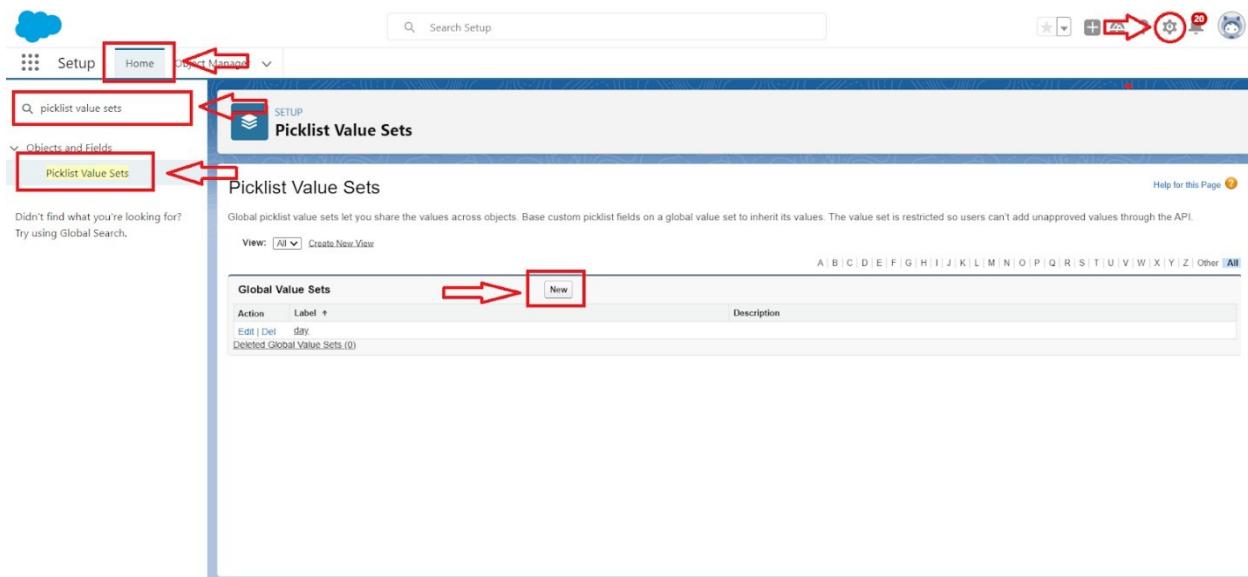
- Change the Field Label:Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

Picklist value sets:

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

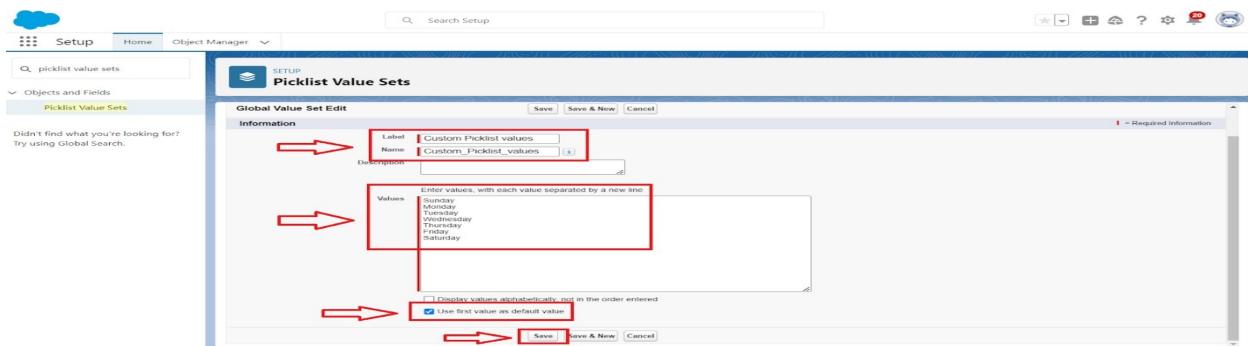
Create a picklist value set:

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



Enter the Label name and API name automatically Generate
Enter the values with each value separated by a new line

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



Check the Use first value as defaultvalue and Click on save.

2. Create a picklist Field for Food selection object

To create fields in an object:

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

The screenshot shows the Salesforce Object Manager page. A red box highlights the 'Object Manager' button in the top left, and a red arrow points to it from the left. Another red box highlights the 'Food Selection' row in the list, and a red arrow points to it from the right. The list includes various standard and custom objects like Entitlement Contact, Event, Feedback, Finance Balance Snapshot, Finance Transaction, and Food Selection.

Now click on “Fields & Relationships” > New

Select Data Type as a “Picklist”

The screenshot shows the 'New Custom Field' wizard, Step 2: Enter the details. A red box highlights the 'Field Label' input field containing 'Breakfast', and a red arrow points to it from the left. Another red box highlights the 'Values' section, which includes a radio button for 'Use global picklist value set' (selected), a radio button for 'Enter values, with each value separated by a new line', and a dropdown menu showing 'None', 'None', and 'Custom Picklist values'. The 'Field Name' and 'Description' fields are also visible.

Fill the Above as following:

- Field Label: Breakfast
- Under Value - Select the Use global picklist value set
- Under the drop down select the Custom Picklist Values

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

3. Create another picklist Field for Food selection object

To create fields in an object :

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

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Food Selection' row in the main list, which is also highlighted by a red arrow pointing to its row number. The object details show it is a 'Custom Object' named 'Food_Selection_c'.

Object Name	Object Label	Type	Created Date
Entitlement Contact	EntitlementContact	Standard Object	
Event	Event	Standard Object	
Feedback	Feedback_c	Custom Object	07/06/2023
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object	
Finance Transaction	FinanceTransaction	Standard Object	
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	

.Now click on “Fields& Relationships” > New

Select Data Type as a “Picklist”

The screenshot shows the 'Food Selection' object's 'Fields & Relationships' page. A red box highlights the 'Fields & Relationships' tab in the left sidebar. The main area shows the configuration for a new picklist field. Red arrows point to several key fields: 'Field Label' (set to 'Select Breakfast'), 'Values' (a text area containing 'Biriyani', 'Dosa', 'Vada', 'Vista', and 'Kebab'), 'Default Value' (set to 'Select Breakfast'), and 'Use first value as default value' (checkbox checked). Other visible fields include 'Field Name', 'Description', 'Help Text', 'Required', 'Auto add to custom report type', and 'Default Value' (formula editor).

Fill the Above as following:

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

1. Idli
2. Bonda
3. Dosa
4. Upma
5. Vada
6. Puri
7. Chapati
 - c. Select Check box Use First value as defaultValue
 - d. Click on Next > Next > Save and new.

Field Dependency:

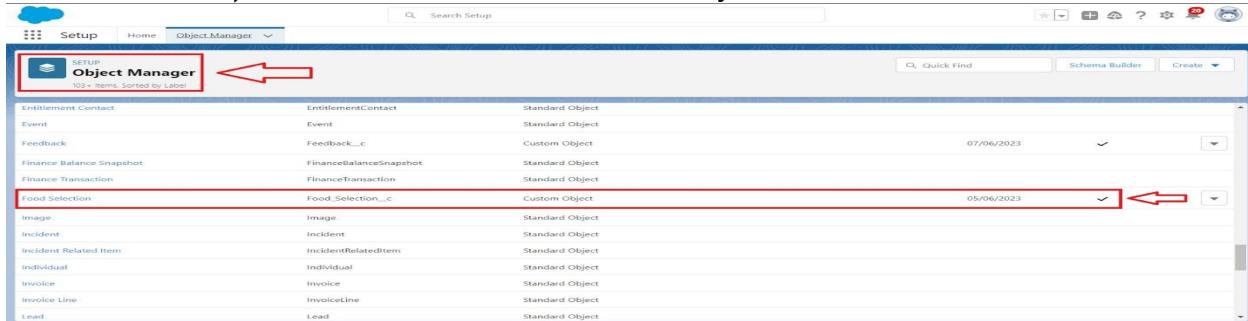
A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by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

Need to use Field Dependency:

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

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

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



Now Click on fields & relationships and Click on Field Dependencies

SETUP > OBJECT MANAGER
Food Selection

Details

Fields & Relationships

10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Breakfast	Breakfast_c	Picklist		
Created By	CreatedBy	Lookup(User)		
Dinner	Dinner_c	Picklist		
Food Selection No	Name	Auto Number		
Last Modified By	LastModifiedBy	Lookup(User)		
Lunch	Lunch_c	Picklist		
Name	Name_c	Master-Detail(Customer1)		
Select Breakfast	Select_Breakfast_c	Picklist	Breakfast	
Select dinner	Select_dinner_c	Picklist	Dinner	

Now Click on New Option

SETUP > OBJECT MANAGER
Food Selection

Food Selection Field Dependencies

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

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

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

SETUP > OBJECT MANAGER
Food Selection

New Field Dependency

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

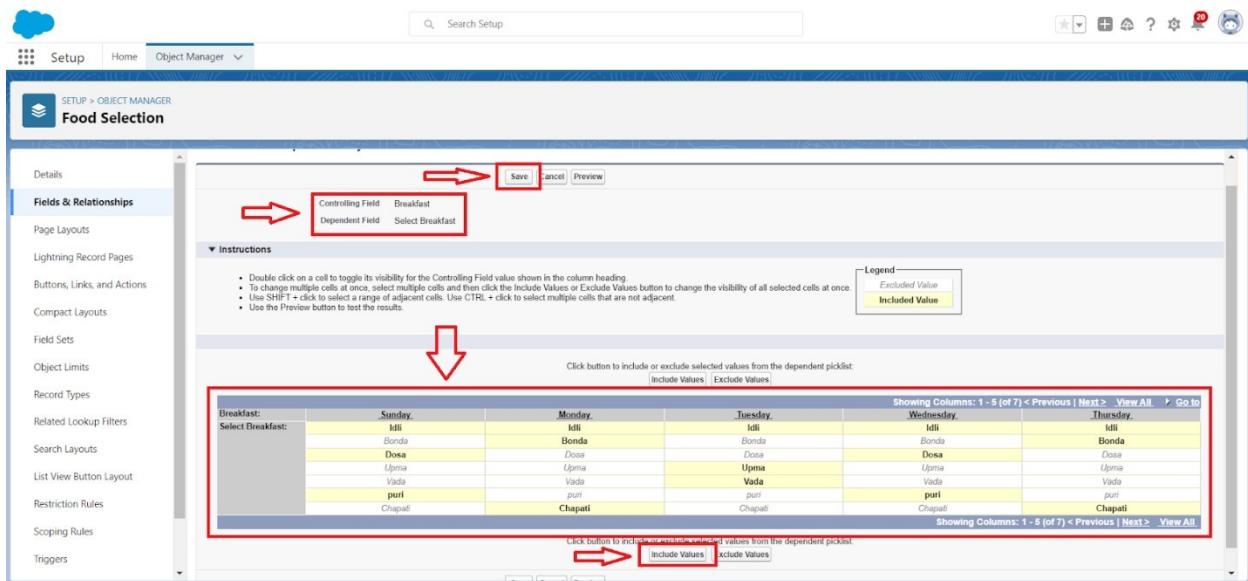
Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

Controlling Field: Breakfast

Dependent Field: Select Breakfast

Continue Cancel

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



4. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar ? clickon the object.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label:Lunch
 - Under Value - Select the Use global picklist value set
 - Under the drop down select the Custom Picklist Values
 - Select required
 - Click on Next > Next > Save and new.

5.To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > clickon the object.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “Picklist”

4. Fill the Above as following:

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

1. Meals

2. Chicken biryani

3. Veg biryani

4. Veg fried rice

5. Egg fried rice

6. Chicken fried rice

7. Curd rice

8. Tomato rice

9. Egg noodles

10. Chicken Noodles

11. Bhagara rice

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

To create a Field dependencies for Lunch and Select Lunch.

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now Click on fields & relationships and Click on Field Dependencies
3. Now Click on New Option
4. Under Controlling Field:Lunch, Dependent Field: Select Lunch and Click on Continue
5. Under the Sunday Ctrl and select the Picklist values Chicken biryani, Egg fried rice, curd rice and Click on Include Values in such a way that do for the remaining days and click on save.

6. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Dinner
 - Under Value - Select the Use global picklist valueset
 - Under the drop down select the Custom PicklistValues
 - Select required
 - Click on Next > Next > Save and new.

7. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “Picklist”

Fill the Above as following:

 - Field Label:Select Dinner
 - Under Value - Enter values, with each value separated by a new line
 - a. Meals
 - b. Chicken biryani
 - c. Vegbiryani
 - d. Vegfried rice
 - e. Eggfried rice
 - f. Chicken fried rice
 - g. Curdrice

- h. Tomato rice
- i. Eggnooldes
- j. Chicken Noodles
- k. Bhagara rice
- o Select Checkbox Use First value as default Value
- o Click on Next > Next > Save and new.

To create a Field dependencies for Dinner and Select Dinner.

1. Go to setup > click on ObjectManager > type object name(FoodSelection) in the search bar
 > click on the object.
2. Now Click on fields & relationships and Click on Field Dependencies
3. Now Click on New Option
4. Under Controlling Field: Dinner,Dependent Field: SelectDinner and Click on Continue
5. Under the Sunday Ctrl and select the Picklist values Chicken biryani, curd rice, Chicken noodles and Click on Include Valuesin such a way that do for the remaining days and click on save.

Creation of fields for the Feedback object

1. create fields & relationship to an object:

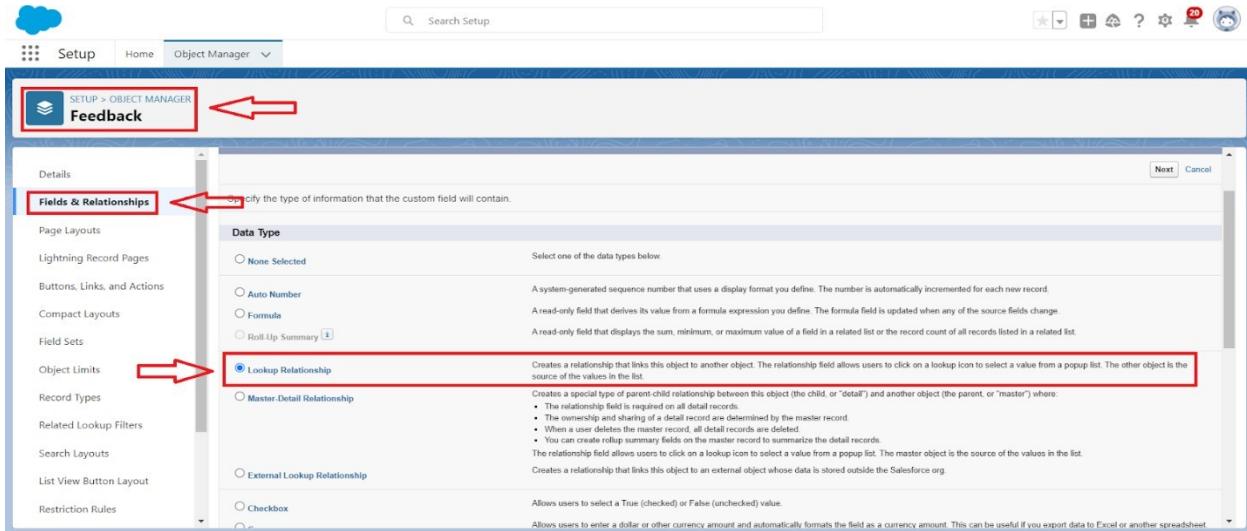
1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area displays the 'Feedback' object details, with a red box highlighting the 'SETUP > OBJECT MANAGER Feedback' breadcrumb. A red arrow points from this box to the breadcrumb. Below this, a sidebar lists various object types like 'Details', 'Page Layouts', etc., with a red box highlighting 'Fields & Relationships'. Another red arrow points from this box to the 'Fields & Relationships' link. The main content area shows a table titled 'Fields & Relationships' with 9 items. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. A red box highlights the 'New' button at the top right of the table. A red arrow points from this box to the 'New' button. The table data includes:

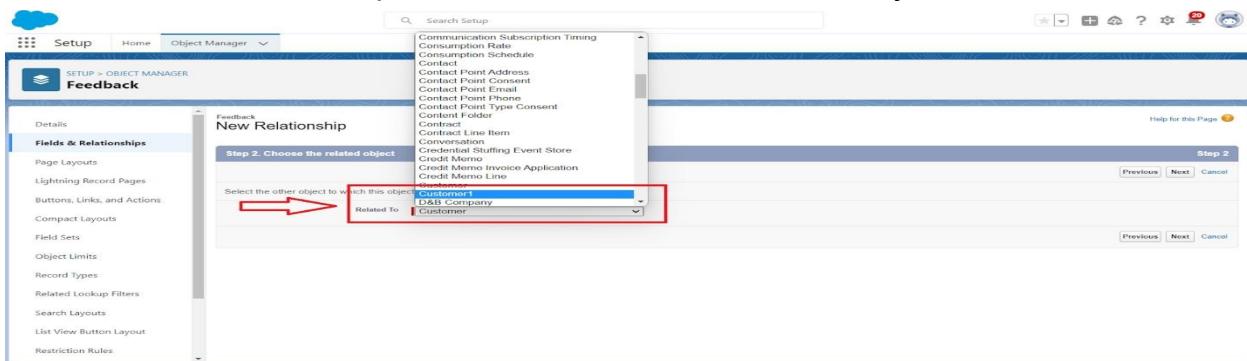
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback NO	Name	Auto Number		
Food	Food_c	Picklist		
Housecleaning	Housecleaning_c	Picklist		
Internet	Internet_c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Lookup(Customer1)		
Owner	OwnerId	Lookup(User.Group)		
Suggestion	Suggestion_c	Text Area(255)		

Select Data Type as a “LookupRelationship”

Click on Next



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



Fill the Above as following:

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

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

Field Label: Name
Field Name: Name

Child Relationship Name: Feedbacks!

What to do if the lookup record is deleted?

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

Auto add to custom report type:

- Add this field to existing custom report types that contain this entity

Lookup Filter:

Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

To create Another fields in an Same object:

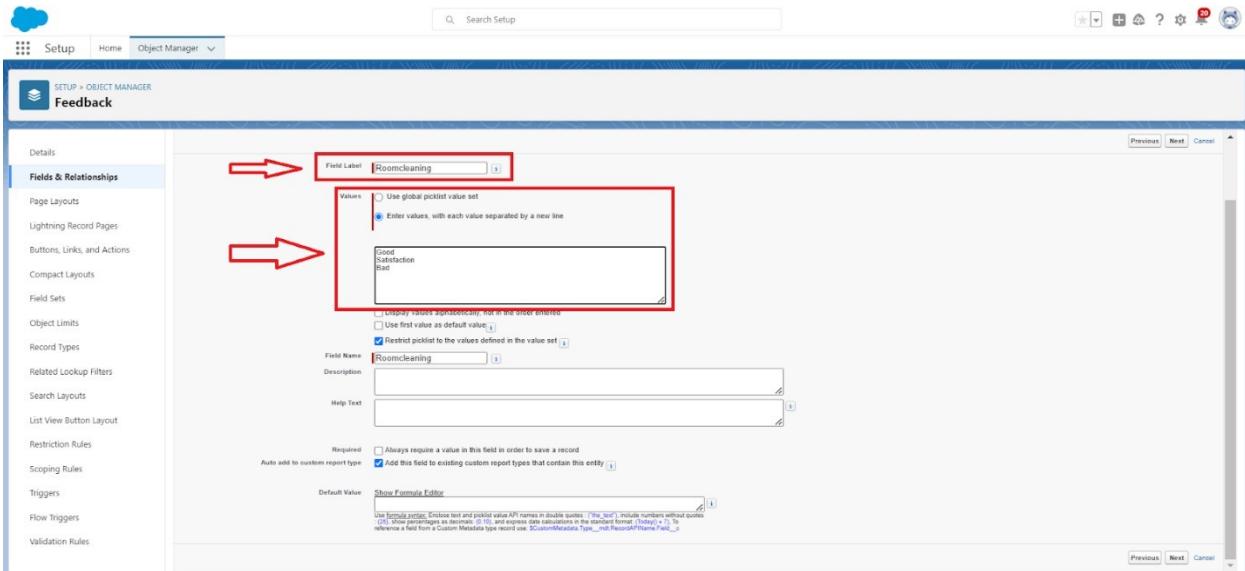
1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.
2. Now click on "Fields& Relationships" > New

Fields & Relationships

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)		✓

Select Data Type as a "Picklist"

Click on Next



Fill the Above as following:

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

3. To create Another Fields in an Same Object

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.
2. Now click on “Fields& Relationships” ? New
3. Select Data Type as a “Picklist”
4. Click on Next
5. Fill the Above as following:
 - Field Label: Internet
 - Field Name :It's gets auto generated
 - Under Values select Enter values,with each value separated by a new line
 1. Good
 2. Satisfaction
 3. Bad
 - Click on Next > Next > Save and new.

4. To create Another Fields in an Same Object

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on object.
2. Now click on “Fields& Relationships” ? New
3. Select Data Type as a “Picklist”
4. Click on Next
5. Fill the Above as following:
 - Field Label:Food
 - Field Name :It's gets auto generated
 - Under Values select Enter values,with each value separated by a new line
1. Good
2. Satisfaction
3. Bad

● Click on Next > Next > Save and new.

5. To create Another Fields in an Same Object

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on theobject.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “Text area”
4. Clickon Next

Fill theAbove as following:

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

Creation of fields for the Total Rooms object

1. To create fields in an object:

1. Go to setup> click on Object Manager> type objectname(Total Rooms) in search bar > click on theobject.
2. Now click on “Fields& Relationships” > New

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

Fill the Above as following:

1. Field Label: RoomsAvailable
2. Field Name : It's gets auto generated
3. Select the Formula ReturnType as “Number”
4. 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.

1. Click on the Advanced Formula “ 30 - Rooms_Booked_c ” and Check Syntax
2. Click on Next > Next > Save and new.

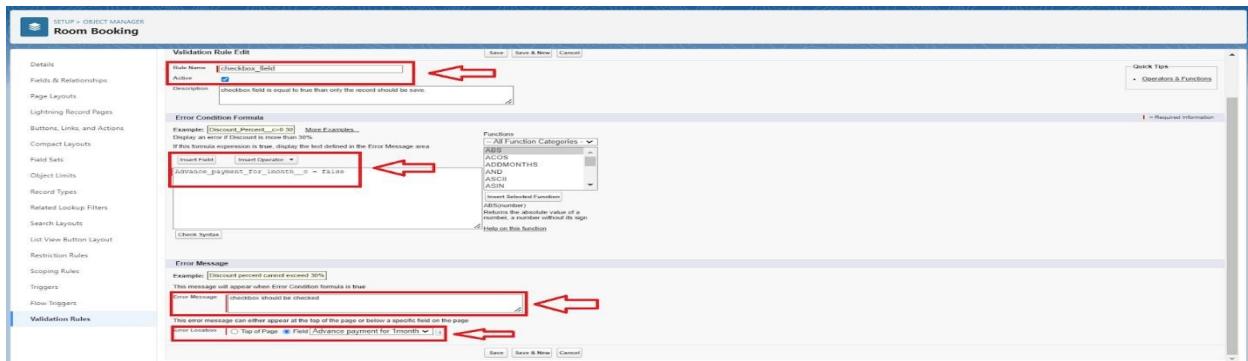
Validation rule

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

create a validation rule to an Room Booking Object

1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.
2. Now click on “Validation rule” at top > New.
3. Enter Rule name “checkbox field” and make the validation should beActive.
4. Enter the formula in the formula Box “Advance_payment_for_1month_c = false” and check forsyntax error.
5. Enter the error message“Checkbox should be checked”

Select error location as field(Advance paymentfor 1month)



Click on save.

create Another validation rule to an Room Booking Object

1. Go to setup > click on Object Manager> type objectname(Room Booking) in the search bar >click on the object.
2. Now click on “Validation rule” at top > New.

3. Enter Rule name “check in rule” and make the validation should be Active.
4. Enter the formula in the formula Box “ Check_in_c = False ” and check for syntax error.
5. Enter the error message “Check box should be checked”
6. Select error location as field(Check in)

The screenshot shows the 'Validation Rule' configuration screen in Salesforce. The 'Rule Name' is 'check_in_rule' (Step 1). The formula 'Check_in_c = False' is entered in the 'Error Condition Formula' field (Step 2). The 'Error Message' is 'Check box should be checked' (Step 3). The 'Error Location' is set to 'Field' (Step 4).

Click on save.

Profile

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

2. Custom Profiles:

Custom ones defined by us.

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

Customuser Profile

To create a new profile:

1. Go to setup > type profiles in quick find box> click on profiles > clone the desired profile(Standard User)
2. Enter profile name (Custom User)> Save.

The screenshot shows the 'Clone Profile' page in the Salesforce Setup. At the top, there's a header with a user icon and the word 'Profiles'. Below it, a section titled 'Clone Profile' asks for the name of the new profile. A note says 'You must select an existing profile to clone from.' A red box highlights the 'Profile Name' field, which contains 'Custom user'. Another red box highlights the 'Save' button at the bottom right of the form.

While still on the profile page, then clickEdit.

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

The screenshot shows the 'Edit Profile' page in the Salesforce Setup. It features two main sections of 'Custom Object Permissions'. The first section covers 'Customers', 'Feedbacks', and 'Food Selections'. The second section covers 'Payments', 'Room Bookings', and 'Total Rooms'. In both sections, every permission under 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All) is checked with a blue checkmark. Red arrows point to the start of each of these two sections.

Scroll down and Click on Save.

Custom platform user1

To create a new profile:

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile(Standard platform User)
2. Enter profile name (Custom platform User1) > Save.
3. While still on the profile page, then click Edit.

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

	Basic Access	Create	Edit	Delete	View All	Modify All
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Feedbacks	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Food Selections	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Room Bookings	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Total Rooms	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Session Settings
Session Times Out After: 2 hours of inactivity
Session Security Level Required at Login: None

Password Policies

- User passwords expire in: Never expires
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obscure secret answer for password resets:
- Require a minimum 1 day password lifetime:

Scroll down and Click on Save.

Custom platform user2

To create new profile:

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile(Standard platform User)
2. Enter profile name (Custom platformUser2) > Save.
3. While still on the profile page, then clickEdit.
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. AndRead Access permission for Total Rooms Object.

	Basic Access	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"/>
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Room Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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:

Roles

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

Marketing Role

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

Your Organization's Role Hierarchy

```
graph TD; NE[Nick Enterprises] --> AddRole1[Add Role]; NE --> CFO[CFO]; CFO --> AddRole2[Add Role]; CFO --> HR[HR]; HR --> AddRole3[Add Role]; CFO --> Manager[Manager]; Manager --> AddRole4[Add Role]; Manager --> OnSite[On Site Emp]; OnSite --> AddRole5[Add Role]; Manager --> Remote[Remote Emp]; Remote --> AddRole6[Add Role];
```

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

Role Edit
New Role

Role Edit

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

Save Save & New Cancel

Then click on Save.

Receptionist Role

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

Role Edit
New Role

Role Edit

Label: Receptionist
Role Name: Receptionist

This role reports to: CEO

Role Name as displayed on reports:

Save **Save & New** **Cancel**

Then click on Save.

Users

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

Create User

Go to setup > type users in quickfind box > select users> click New user.

Setup Home Object Manager

Q users

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users

All Users

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Androthy Veeta Venkata Varaprasad	Andr	newproject@thesmarbridge.com	System Administrator	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.000500000000yw7eay.48b1yqzghez@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	User_Integration	integ	integration@000500000000yw7eay.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@000500000000yw7eay.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

Fill in the fields

- a. First Name : sandeep
- b. Last Name : gujja
- c. Alias : Give a Alias Name
- d. Email id : Give your Personal Email id

e. Username : Username should be in this form: text@text.com

f. Nick Name : Give a Nickname

g. Role : CEO

h. User licence : Salesforce

i. Profiles : Customuser

New User

User Edit

General Information

First Name: sandeep
Last Name: gujja
Alias: sgujj
Email: sandeep@gmail.com
Username: gsandeep@sunny.com
Nickname: Sunny

Role: CEO
User License: Salesforce
Profile: Custom user

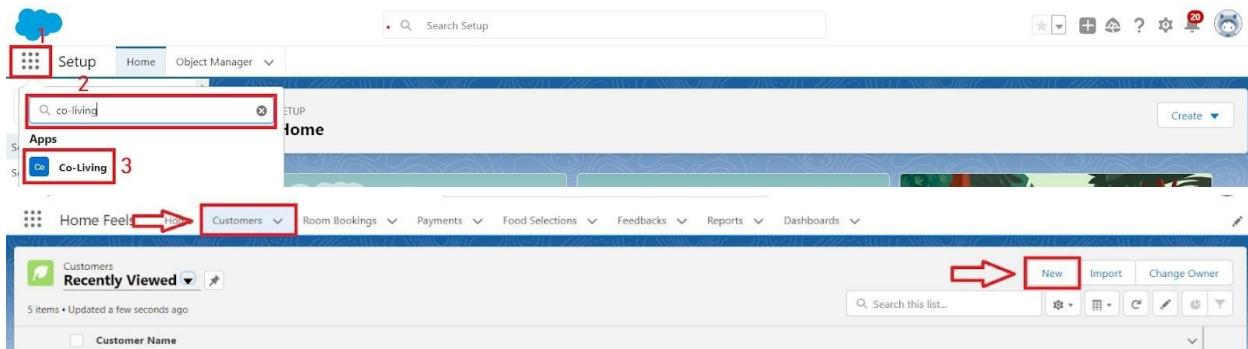
Save

User Adoption

Create a Record (Customers)

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

Search Home Feels & click on it.



Record

(customers)

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

The screenshot shows the 'Customer Details' page for 'sandeep'. The top navigation bar has a red box around the 'Customers' tab. The main content area displays various customer information fields, such as Customer Name, Phone no, Email id, Owner, Permanent Address, current Status, and Employee. A red box highlights the entire 'Details' section. At the bottom, it shows 'Created By' and 'Last Modified By' information.

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

Delete a Record(Customers)

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

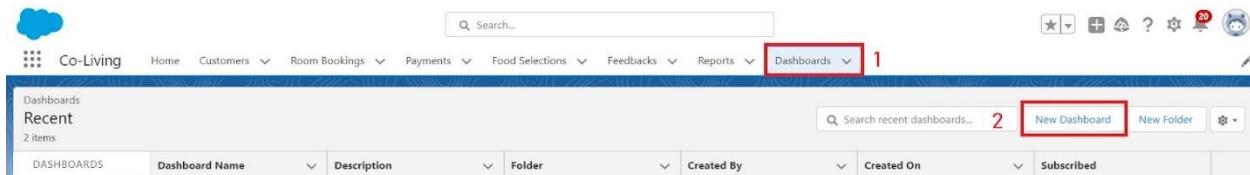
The screenshot shows the 'Recently Viewed' list of customers. The top navigation bar has a red box around the 'Customers' tab. The list includes 'sandeep', 'Abhilash', 'Ganesh', 'suman', and 'Prasad'. A red box highlights the 'sandeep' entry. In the bottom right corner of the list, there is a red box with the number '3' pointing to the 'Edit' button. Another red box with the number '4' points to the 'Delete' button, which is highlighted with a red border.

Dashboards

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

Create Dashboard

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



The screenshot shows a software application interface with a navigation bar at the top. The 'Dashboards' tab is highlighted with a red box and the number '1'. Below the navigation bar, there is a search bar labeled 'Search...' and several other tabs like 'Home', 'Customers', 'Room Bookings', 'Payments', 'Food Selections', 'Feedbacks', 'Reports', and another 'Dashboards' tab. On the right side of the top bar, there are various icons. The main area is titled 'Dashboards' and shows a list of recent items. At the bottom of this list, there is a search bar labeled 'Search recent dashboards...' with the number '2', a 'New Dashboard' button highlighted with a red box, and other buttons like 'New Folder' and a settings icon.

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

Create Another Dashboard

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

Edit Component

Room booking report

Subtitle

Amount

Footer

Legend Position

Right

Component Theme

- Light (Dashboard default)
- Dark

Customer Name

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

View Report (Room booking report)

Cancel Update

Select add component.

Select a ReportCustomer with Room Booking and click on select.

Select Report

Reports

Recent

- Created by Me
- Private Reports
- Public Reports
- All Reports

Folders

- Created by Me
- Shared with Me
- All Folders

Selected Report

Room booking report
Veera Venkata Varaprasad Androthu · 14-Jun-2023, 2:58 pm · custom report

Room booking report
Veera Venkata Varaprasad Androthu · 07-Jun-2023, 4:53 pm · Private Reports

Sample Flow Report: Screen Flows
Automated Process - 05-Jun-2023, 10:09 am · Public Reports

Cancel Select

Flows

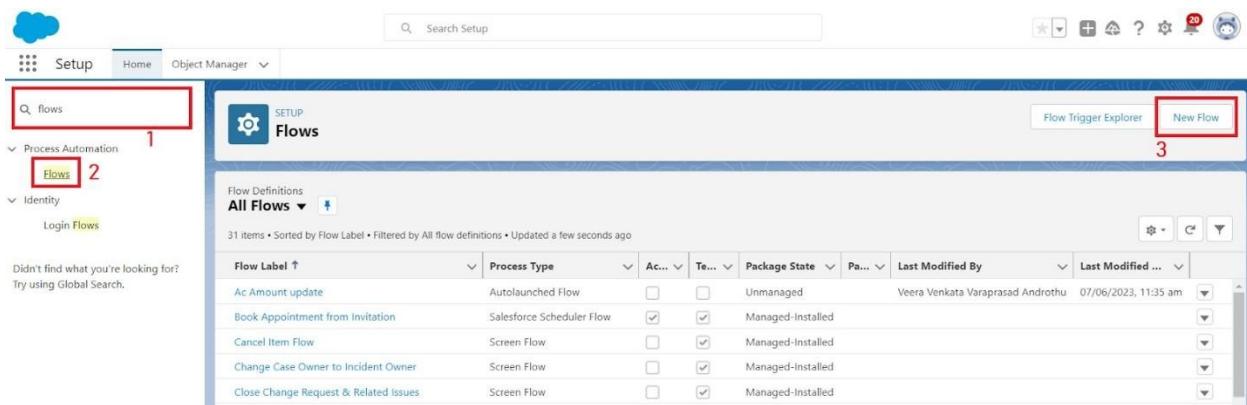
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Why do we need to create a flow:

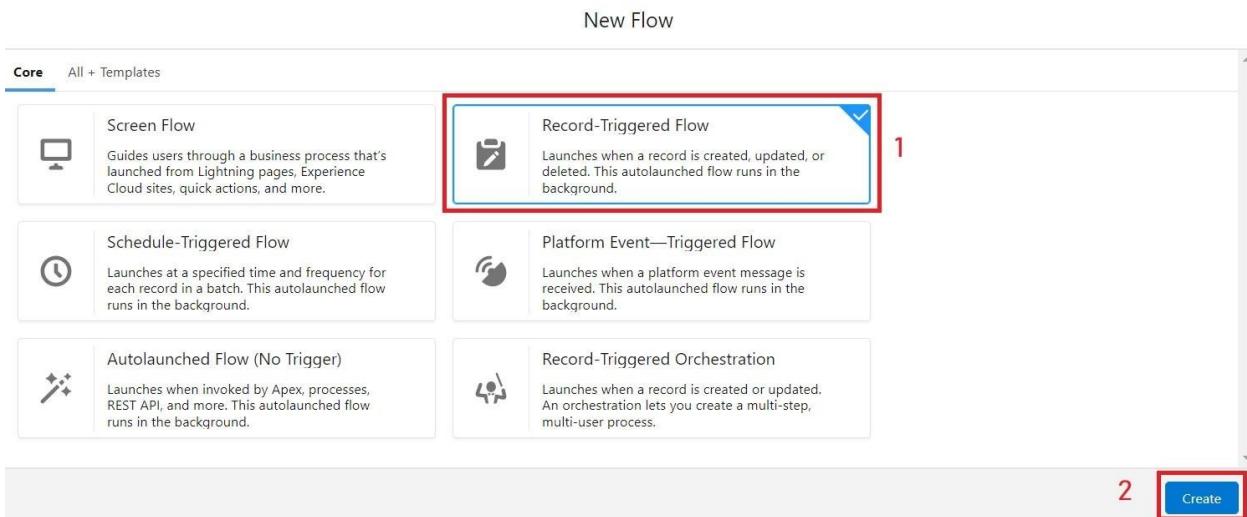
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

Create a Flow

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



Select the Record-triggered flow and Click on Create.



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

1. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.
2. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "DecisionElement".

3. Enter the DetailsLabel: Field should be Update, API name: Gets Automatically Generated.

4. Enter the OutcomeDetails Label: Singlesharing, Outcome API name: Gets Automatically Generated.

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

New Decision

The screenshot shows the 'New Decision' interface. At the top, there are fields for 'Label' (Field Should be Update) and 'API Name' (Field_Should_be_Update). Below this is a 'Description' field containing '1'. The main area is titled 'Outcomes' with the sub-instruction: 'For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.' On the left, there's a 'OUTCOME ORDER' section with a '+' button (labeled 1) and a 'Default Outcome' section with a 'Single Sharing' option (labeled 4). To the right, there's an 'OUTCOME DETAILS' section (labeled 2) with a 'Label' field (Single Sharing) and an 'Outcome API Name' field (Single_Sharing). Below this is a 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)' (labeled 3). Underneath, there are two condition rows: one for 'Room sharing' with resource '\$Record > Room sharing', operator 'Equals', and value 'single sharing'; and another for 'AC - 3000' with resource '\$Record > AC - 3000', operator 'Equals', and value 'False'. At the bottom right are 'Cancel' and 'Done' buttons.

1. Enter the OutcomeDetails Label: Double sharing, OutcomeAPI name: Gets Automatically Generated.

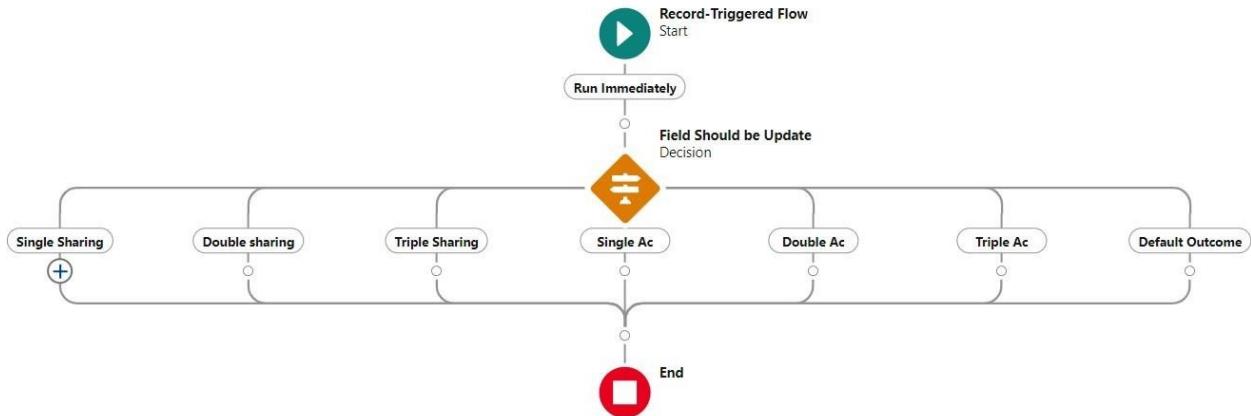
- a. Resource: Select Record.Room sharing.
- b. Operator: Select Equals.
- c. Value: Select Doublesharing.

- d. Click on “Add Condition”
 - e. Resource: Select Record.AC-3000.
 - f. Operator: Select Equals.
 - g. Value: Select False.
 - h. Click on “+” Symbol In the OutcomeOrder.
2. Enter the Outcome Details Label: Triple sharing, Outcome API name: Gets AutomaticallyGenerated.
- a. Resource: Select Record.Room sharing.
 - b. Operator: Select Equals.
 - c. Value: Select Triplesharing.
 - d. Click on “Add Condition”
 - e. Resource: Select Record.AC-3000.
 - f. Operator: Select Equals.
 - g. Value: Select False.
 - h. Click on “+” Symbol In the OutcomeOrder.
3. Enter the Outcome Details Label: Single Ac, OutcomeAPI name: Gets Automatically Generated.
- a. Resource: Select Record.Room sharing.
 - b. Operator: Select Equals.
 - c. Value: Select Singlesharing.
 - d. Click on “Add Condition”
 - e. Resource: Select Record.AC-3000.
 - f. Operator: Select Equals.
 - g. Value: Select True.

- h. Click on “+” Symbol In the OutcomeOrder.
4. Enter the OutcomeDetails Label: DoubleAc, Outcome API name: Gets Automatically Generated.
 - a. Resource: Select Record.Room sharing.
 - b. Operator: Select Equals.
 - c. Value: Select Doublesharing.
 - d. Click on “Add Condition”
 - e. Resource: Select Record.AC-3000.
 - f. Operator: Select Equals.
 - g. Value: Select True.
 - h. Click on “+” Symbol In the OutcomeOrder.
5. Enter the Outcome Details Label: TripleAc, Outcome API name:Gets Automatically Generated.
 - a. Resource: Select Record.Room sharing.
 - b. Operator: Select Equals.
 - c. Value: Select Triplesharing.
 - d. Click on “Add Condition”
 - e. Resource: Select Record.AC-3000.
 - f. Operator: Select Equals.

g. Value: Select True.

h. Click on Done.



1. Click on “+” Symbol under the single sharing and Select the “update Records” in the drop downlist.

2. Enter the update records details

- a. Label: Single.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.
- e. Value: 28000.
- f. Click on Done.

3. Enter the update records details

- a. Label: Double.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.
- e. Value: 24000.
- f. Click on Done.

4. Enter the update records details

- a. Label: Triple.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.
- e. Value: 20000.
- f. Click on Done.

5. Enter the update records details

- a. Label: Single ac1.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.
- e. Value: 34000.
- f. Click on Done.

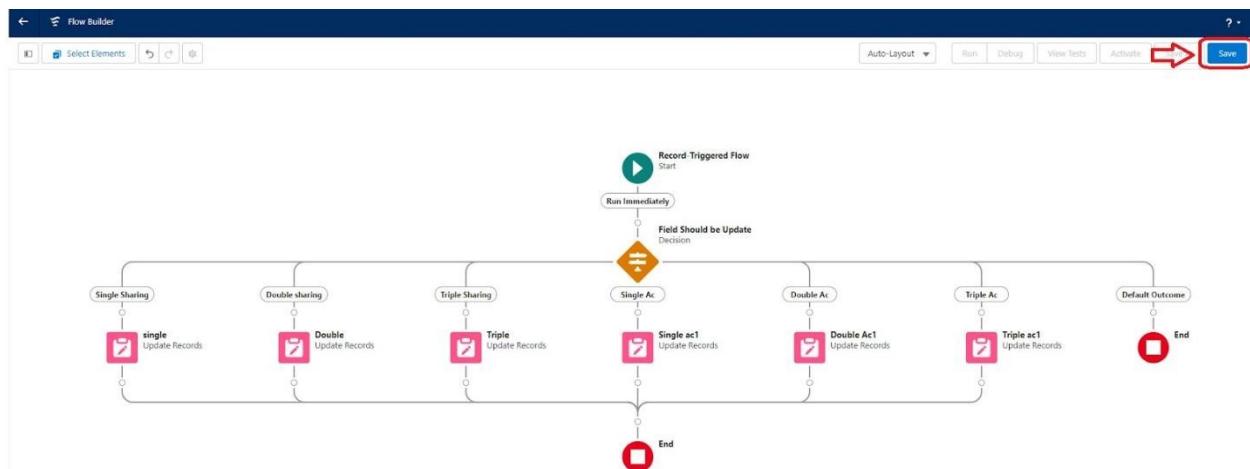
6. Enter the update records details

- a. Label: Double ac1.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.
- e. Value: 30000.
- f. Click on Done.

7. Enter the update records details

- a. Label: Triple ac1.
- b. API name: Gets automatically Generated.
- c. Under the Set Field Values for the Room BookingRecord.
- d. Field: Amount.
- e. Value: 26000.
- f. Click on Done.

8. The Flow will Form like This and Click on save.



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

Conclusion:

- The CRM application for managing bookings in your co-living space is an essential tool to streamline and enhance the customer experience. It will allow you to efficiently manage and store customer details, enabling residents to easily choose from different air-conditioned rooms with multiple sharing options. The platform will also enable users to select special food items on a daily basis, catering to their individual preferences. Additionally, the application will support multiple payment modes, ensuring flexibility and convenience for residents.
- Moreover, the feedback feature will empower residents to provide insights into the quality of services, such as room cleaning, internet connectivity, and food services, which will help maintain and improve service standards. Overall, this CRM system will not only foster a seamless living experience but also reinforce the values of collaboration, comfort, and community that are at the core of the co-living concept. By balancing privacy and communal living, the application will support the creation of a vibrant and inclusive environment, allowing individuals to connect, thrive, and enhance their quality of life.

