

A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING



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PROJECT ABSTRACT:

The 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...

INDEX

<u>Title Name</u>	<u>Page no</u>
A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING	1
PROJECT ABSTRACT	2
<u>TASK</u>	
1.Salesforce	4 - 5
2.Object	5 - 14
3.Tab	14 - 15
4.The Lightning App	16 - 17
5.Fields & Relationships	17 - 44
6.Validation rule	45 - 46
7.Profile	46 - 49
8.Roles	49 - 50
9.Users	51 - 53
10.User Adoption	53 - 55
11.Reports	55 - 57
12.Dashboards	57 - 58
13.Flows	59 - 62

TASK 1- Salesforce

Introduction:

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

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

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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

<https://youtu.be/r9EX3IGde5k>

Activity 1- Creating Developer Account

Creating a developer org in salesforce.

- Click on link <https://developer.salesforce.com/signup>
- 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
7. username
8. finally Click on sign me up after filling these.

Gmail YouTube Maps

All Bookmarks

Sign up for your Salesforce Developer Edition

A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name* Last Name*

Email*

Role*

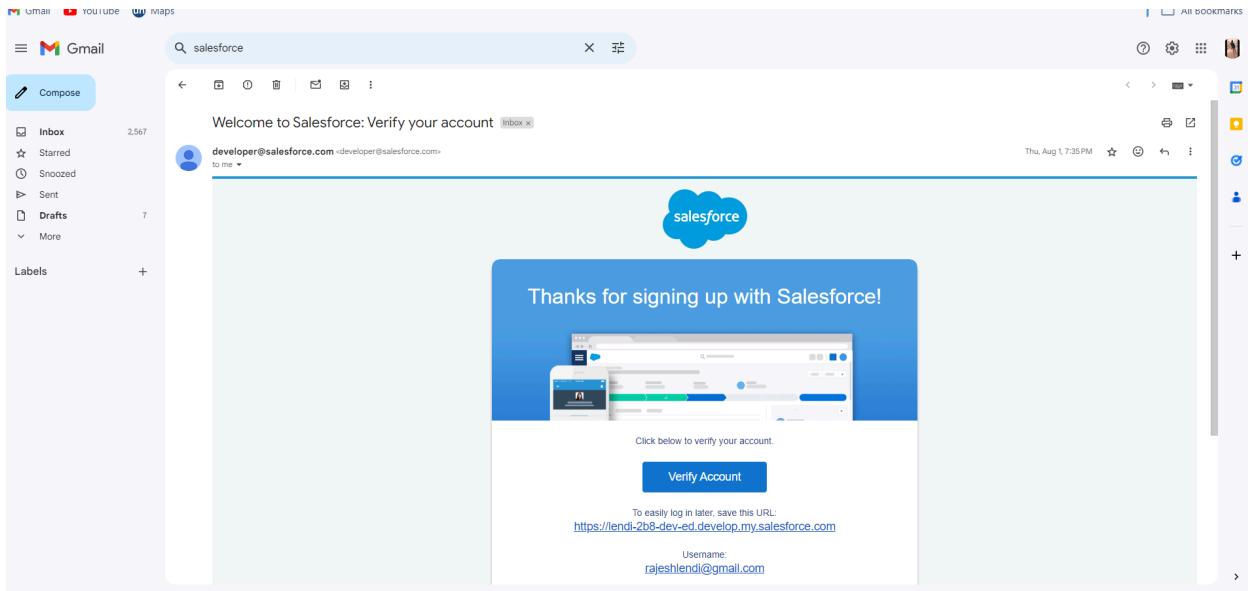
Company*

Country/Region*

State/Province*

Activity 2 - Account Activation

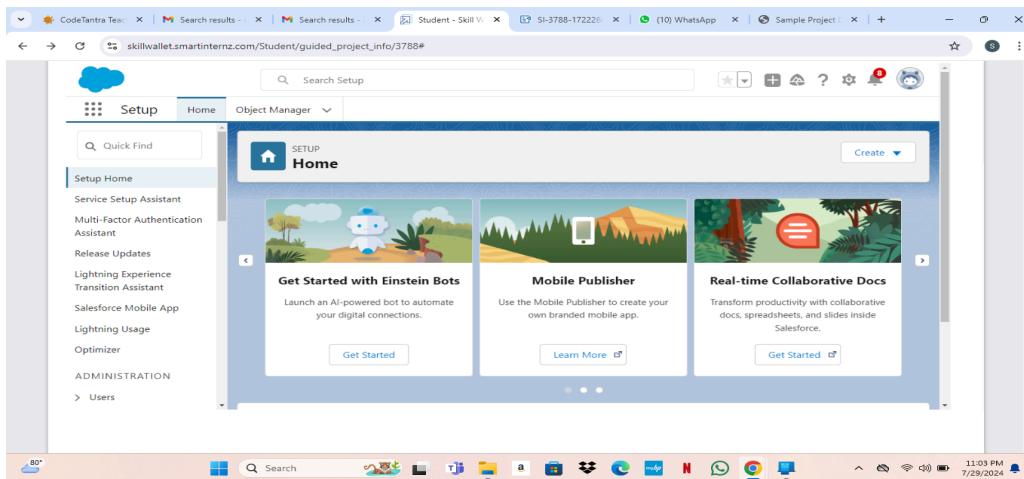
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2 . Click on Verify Account

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

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



Task 2 - Object

Introduction:

What Is an Object?

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

Salesforce objects are of two types:

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

Activity1 - Create a custom object for Total Rooms

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Total Room ".
4. Fill in the plural label as " Total Rooms ".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
11. Leave everything else as is, and click Save.

Setup Home Object Manager

Total Room

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.

Details

Record Name: Total No Of Rooms Example: Account Name
Data Type: Text Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in 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 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

Save Save & New Cancel

Setup Home Object Manager

Total Room

Edit Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label:	Total Room	Example:	Account
Plural Label:	Total Rooms	Example:	Accounts

Starts with vowel sound:

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

Object Name: Total_Rooms Example: Account

Description:

Context-sensitive Help Setting:

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

Content Name: None

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: Total No Of Rooms Example: Account Name

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The page title is 'SETUP > OBJECT MANAGER Total Room'. On the left, there's a sidebar with various options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The main area is titled 'Details' and contains fields for 'Description', 'API Name' (set to 'Total_Rooms__c'), 'Custom' (checked), 'Singular Label' (set to 'Total Room'), 'Plural Label' (set to 'Total Rooms'), 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (link to 'Standard salesforce.com Help Window'). There are 'Edit' and 'Delete' buttons at the top right.

Activity2- Create a custom object for Customer

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as "Customer1".
4. Fill in the plural label as "Customers".
5. Record name: "Customer Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various configuration options like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Customer1' and shows the 'Details' tab. It includes fields for API Name ('Customer1__c'), Singular Label ('Customer1'), and Plural Label ('Customers'). Under 'Optional Features', 'Enable Reports' and 'Track Field History' are checked. In the 'Deployment Status' section, 'Deployed' is selected. Buttons for 'Edit' and 'Delete' are at the top right.

Activity3 - Create a custom object for Room Booking

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Room Booking ".
4. Fill in the plural label as " Room Bookings ".
5. Record name: "Room No "
6. Select the data type as "Auto number ".
7. Under Display format enter RN-{000}
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.

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

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. On the left, a sidebar lists various 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 'Room Booking' object details. The 'Details' section includes fields for Description, API Name (set to 'Room_Booking__c'), Singular Label ('Room Booking'), and Plural Label ('Room Bookings'). Under 'Optional Features', 'Enable Reports' and 'Track Activities' are checked. In the 'Deployment Status' section, 'Deployed' is selected. The 'Help Settings' field contains the URL 'Standard salesforce.com Help Window'. At the bottom right of the main panel are 'Edit' and 'Delete' buttons.

Activity4 - Create a custom object for Payment

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as "Payment1".
4. Fill in the plural label as " Payments ".
5. Record name: "Payment No "
6. Select the data type as "Auto number ".
7. Under Display format enter PNO-{000}
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save

The screenshot shows the Salesforce Object Manager setup screen. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup'. On the right are various icons for configuration. The main area has a title 'SETUP > OBJECT MANAGER' and 'Payment1'. On the left is a sidebar with 'Details' and a list of tabs: 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 has a 'Details' section with fields for 'Description', 'API Name' (Payment1__c), 'Custom' (checked), 'Singular Label' (Payment1), and 'Plural Label' (Payments). To the right are sections for 'Optional Features' (Enable Reports checked, Track Activities checked, Track Field History checked), 'Deployment Status' (Deployed checked), 'Help Settings', and 'Standard salesforce.com Help Window'. At the bottom right are 'Edit' and 'Delete' buttons.

Activity5 -Create a custom object for Food Selection

To create a custom object, follow these steps:

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

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

- Header:** Search Setup, Setup, Home, Object Manager
- Breadcrumbs:** SETUP > OBJECT MANAGER
- Page Title:** Food Selection
- Left Sidebar (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
- Right Main Area (Details):**

Description	
API Name	Food_Selection__c
Custom	✓
Singular Label	Food Selection
Plural Label	Food Selections
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window
- Buttons:** Edit, Delete

Activity6 - Create a custom object for Feedback

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Feedback ".
4. Fill in the plural label as " Feedbacks ".
5. Record name: "Feedback No "
6. Select the data type as "Auto number ".
7. Under Display format enter Fd No-{0000}
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

The screenshot shows the Salesforce Setup interface with the Object Manager open for the 'Feedback' object. The 'Details' tab is selected, showing the following configuration details:

- Description:** None
- API Name:** Feedback__c
- Custom:** ✓
- Singular Label:** Feedback
- Plural Label:** Feedbacks

On the right side, there are several checkboxes:

- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Task-3 Tab

Introduction:

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. Visual force Tabs

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

4. Lightning Component Tabs

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

5. Lightning Page Tabs

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

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

Activity1- Creating a Tab for Total Rooms

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

Activity 2 - Create a Tab for Customers

To create a Tab:(Customers)

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

Activity 3 - To create a Tab for Room Bookings

To create a Tab:(Room Bookings)

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

Activity 4 -Create a Tabs For Remaining Objects

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

Action	Label	Tab Style	Description
Edit Del	Customers	Keys	
Edit Del	Feedbacks	Keys	
Edit Del	Food Selections	Keys	
Edit Del	Payments	Keys	
Edit Del	Room Bookings	Keys	
Edit Del	Total Rooms	Keys	

Task-4 Lightning App

Introduction:

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

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

Activity1 - Create a Lightning App

1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.

The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes links for Lightning App Builder, App Settings, Pages, Help, and a search bar. The main menu on the left lists App Settings, App Details & Branding (which is selected), App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles. The central panel displays the 'App Details & Branding' configuration screen. It contains fields for 'App Name' (co-living), 'Developer Name' (coliving), 'Image' (a placeholder box with an 'Upload' button), 'Primary Color Hex Value' (#0070D2), and a 'Description' field ('Enter a description...'). Below these are 'Org Theme Options' (unchecked) and an 'App Launcher Preview' section showing a blue square icon with 'CO' and the text 'co-living'. The URL in the browser is <https://mallareddyuniiversity-7e6-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02udM000005DxYrQAK&retUrl=https%3A%2F%2Fmallareddyuniiversity-7e6-d...>.

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.

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' (App Details & Branding, App Options, Utility Items (Desktop Only)), 'Navigation Items' (selected), and 'User Profiles'. The main area is titled 'Navigation Items' and contains a description: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' Below this is a 'Available Items' list with a search bar and a 'Create' button. The list includes: Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, and Annual Reports. To the right is a 'Selected Items' list with icons and names: Home, Total Rooms, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. Navigation arrows between the two lists allow items to be moved.

4. To Add User Profiles:

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

The screenshot shows the 'User Profiles' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' (App Details & Branding, App Options, Utility Items (Desktop Only)), 'Navigation Items' (selected), and 'User Profiles' (selected). The main area is titled 'User Profiles' and contains a description: 'Choose the user profiles that can access this app.' Below this is a 'Available Profiles' list with a search bar. The list includes: Analytics Cloud Security User, Authenticated Website, Authenticated Websites, B2B Reordering Portal Buyer Profile, Contract Manager, Custom platform User1, Custom platform User2, and Custom User. To the right is a 'Selected Profiles' list containing 'System Administrator'. Navigation arrows between the two lists allow profiles to be moved.

Task-5 Fields & Relationships

Introduction:

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

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

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

Custom Fields:

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

Activity1- Creation of fields for the customer1 object

➤ 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
3. Select Data Type as a “Phone”
4. Click on next
5. Fill the Above as following:
 - Field Label: Phone no
 - Field Name : gets auto generated
 - Click on Next > Next > Save and new.

Custom Field Definition Edit

Field Information

- Field Label: Phone no
- Field Name: Phone_no
- Description: (empty)
- Help Text: (empty)
- Data Owner: User
- Field Usage: -None-
- Data Sensitivity Level: -None-
- Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) Chosen

General Options

- Required: Always require a value in this field in order to save a record
- Default Value: Show Formula Editor
- Use formula editor: Enclose text and picklist value API names in double quotes ("Phone_no"). Include numbers without quotes ("123"). Use parentheses as delimiters. (B) (N) and express date formats in the standard format (MM/DD/YY). To reference a field from a Custom Metadata type record use: <CustomMetadata_Type>. and RecordName.FieldName

➤ To create another fields in an object:

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

Custom Field Definition Edit

Field Information

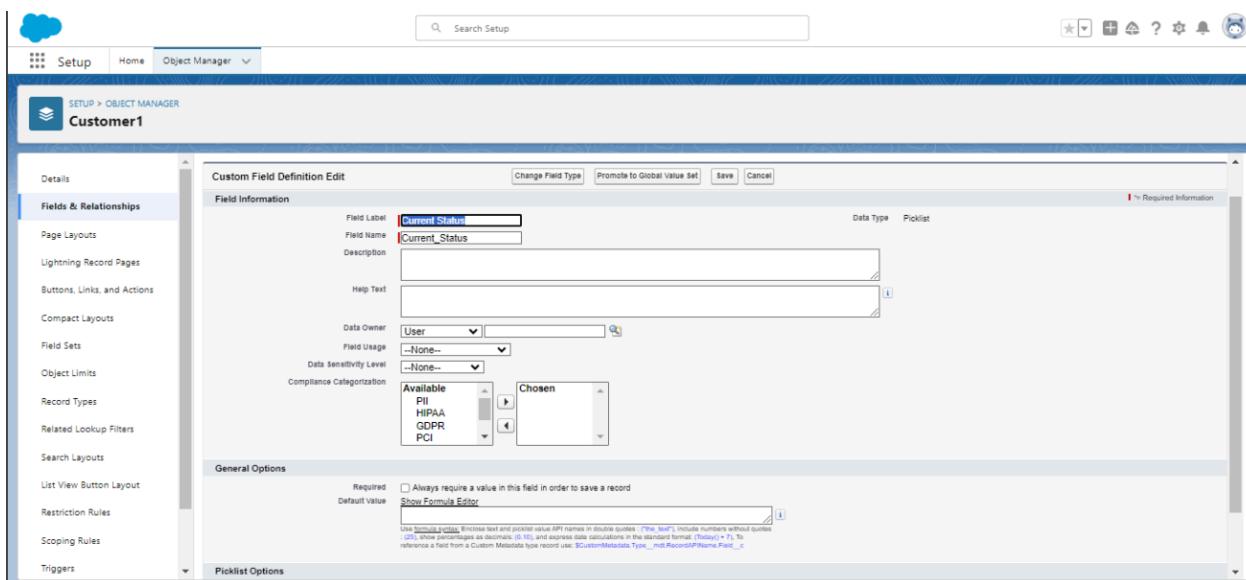
- Field Label: Email
- Field Name: Email
- Description: (empty)
- Help Text: (empty)
- Data Owner: User
- Field Usage: -None-
- Data Sensitivity Level: -None-
- Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) Chosen

General Options

- Required: Always require a value in this field in order to save a record
- Unique: Do not allow duplicate values
- External ID: Set this field as the unique record identifier from an external system
- Default Value: Show Formula Editor

To create another fields in an object:

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

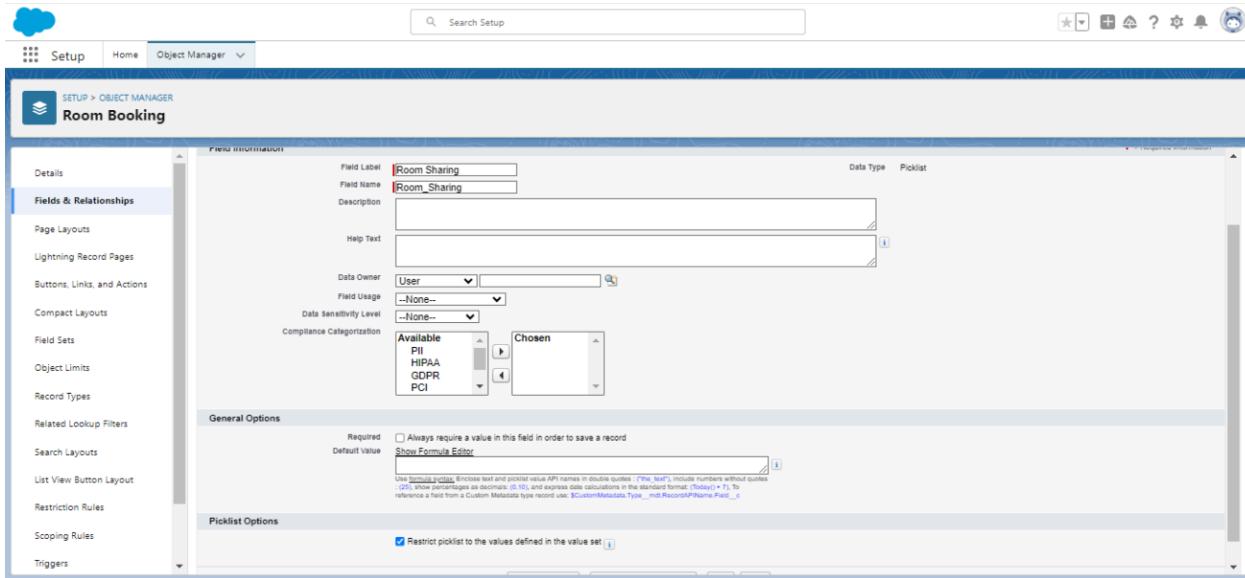


Activity 2- Creation of fields for the Room Booking object

1. To create fields in an object:

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

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



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

To create fields & relationship to an object:

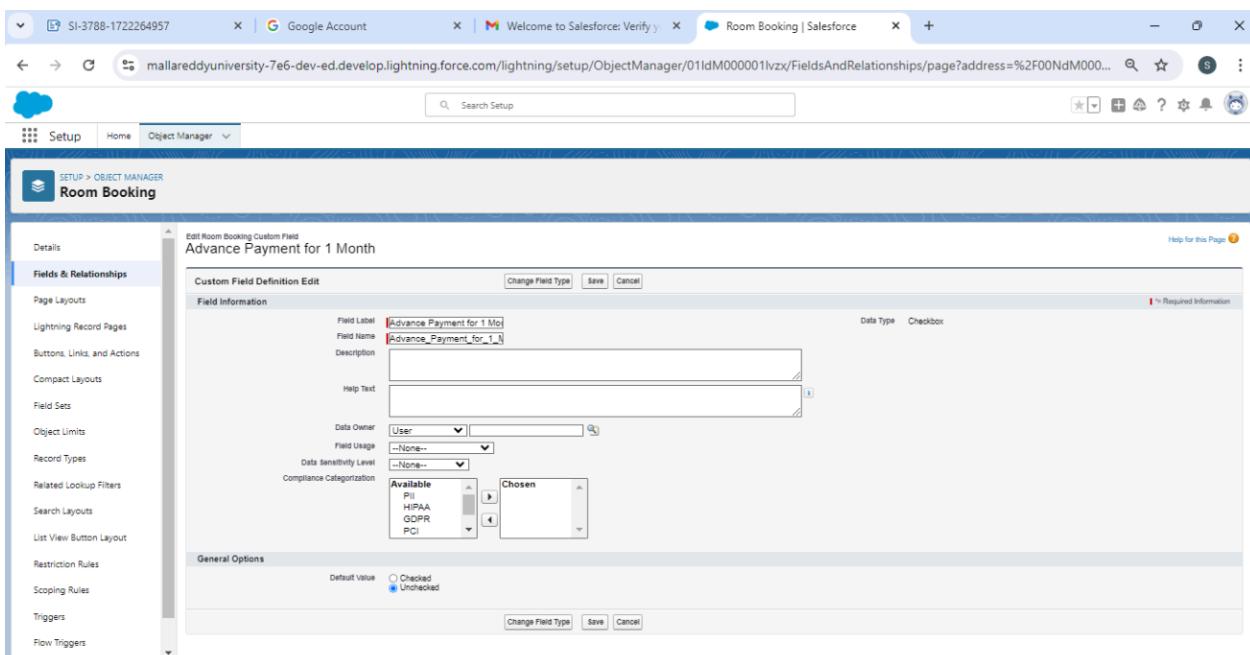
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Customer1” object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

3.To create fields in an object:

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

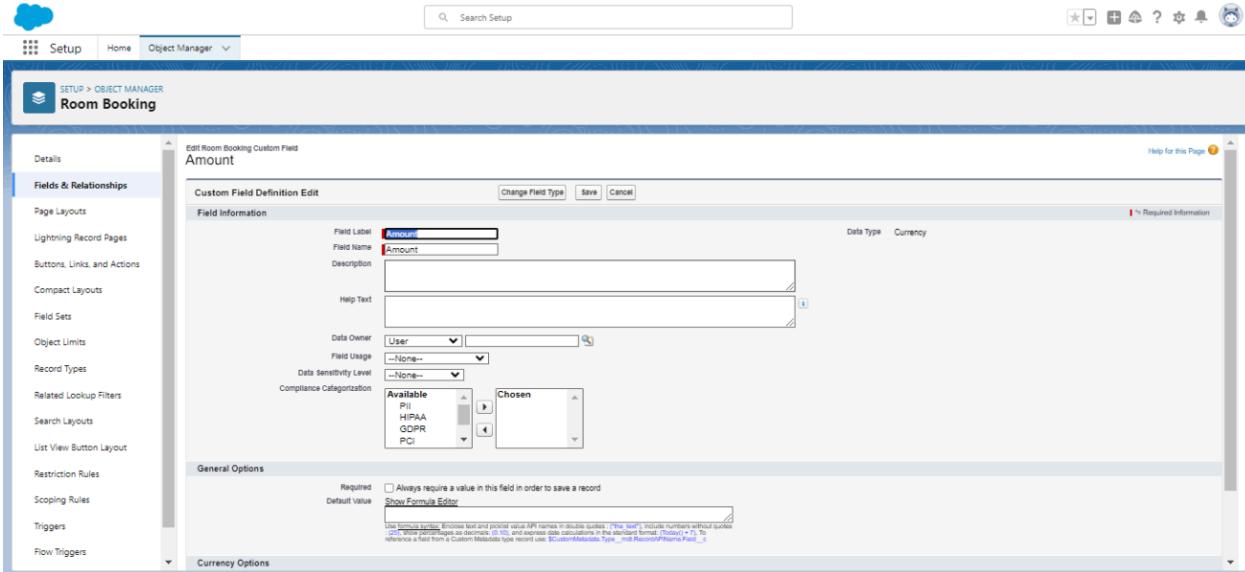
4. To create fields in an object:

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



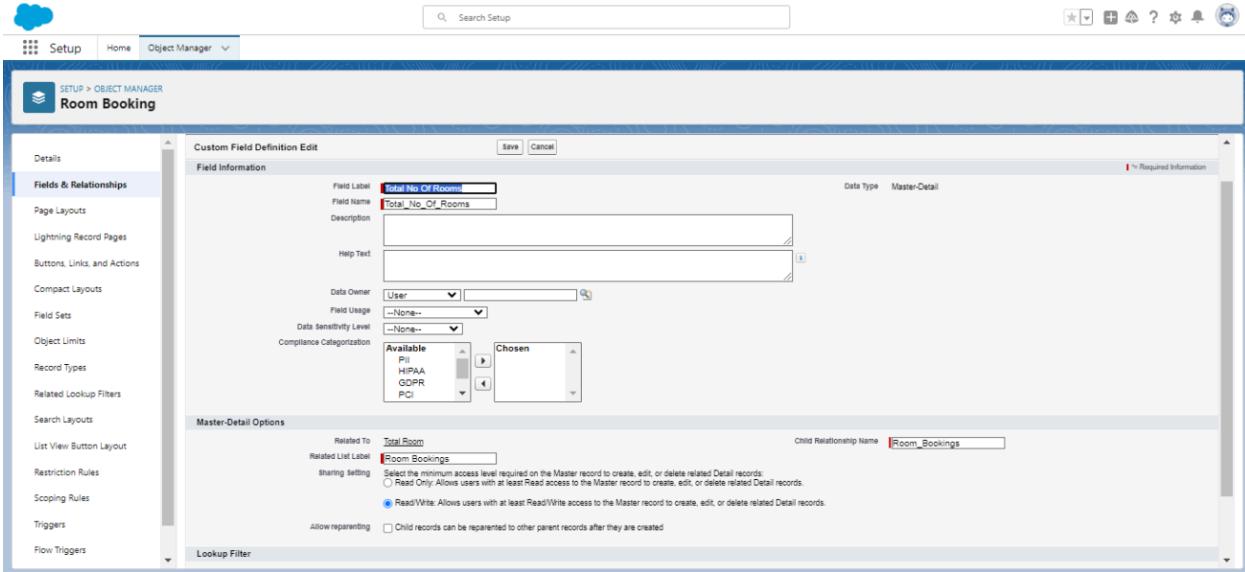
5. To create fields in an object:

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



6. To Create a Fields & Relationship to an Object

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Rooms” object and click on Next
 - Fill the Above as following:
 - Change the Field Label: Total No Of Rooms
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.



7. To Create a Roll up Summary Field in “Total Room Object”

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

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

Top Screenshot: This screenshot shows the "Edit Total Room Custom Field" screen. The custom field is named "Rooms Booked". The configuration details are as follows:

- Field Information:**
 - Field Label: Rooms Booked
 - Field Name: Rooms_Booked
 - Description: (empty)
 - Help Text: (empty)
 - Data Owner: User
 - Field Usage: --None--
 - Data Sensitivity Level: --None--
 - Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) and Chosen
- Bottom Screenshot:** This screenshot shows the "Roll-Up Summary Options" screen for the "Total Room" object. The configuration details are as follows:
 - Roll-Up Summary Options:**
 - Data Type: Roll-Up Summary
 - Calculation Options: Automatic calculation (Recommended) (selected)
 - Force a mass recalculation of this field: (unchecked)
 - Select Object to Summarize:**
 - Master Object: Total Room
 - Summarized Object: Room Bookings
 - Select Roll-Up Type:**
 - COUNT (selected)
 - SUM
 - MIN
 - MAX
 - Field to Aggregate: --None--
 - Filter Criteria:**
 - All records should be included in the calculation (selected)
 - Only records meeting certain criteria should be included in the calculation (unchecked)

8. To create fields in an object:

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

- Select the Formula Return Type as “Number”
- Select the Decimal places as “0” and Click on Next
- Click on the Advanced Formula and Enter the value in formula box “ 30 - ” and Click on insert field than you will find a pop window under the Room Booking select the Total No Of Rooms in the second Column and select the Room Booked in the third column and click on insert “ 30 - Total_No_of_Rooms__r.Rooms_Booked__c ” and Check Syntax
- Click on Next > Next > Save and new.

Setup > OBJECT MANAGER Room Booking

Custom Field Definition Edit

Field Information

- Field Label: Rooms Available
- Field Name: Rooms_Available
- Description:
- Help Text:
- Data Owner: User
- Field Usage: --None--
- Data Sensitivity Level: --None--
- Compliance Categorization:
 - Available: PII, HIPAA, GDPR, PCI
 - Chosen: (empty)

Setup > OBJECT MANAGER Room Booking

Insert Field

Rooms Available (Number) =
30 - Total_No_of_Rooms__r.Rooms_Booked__c

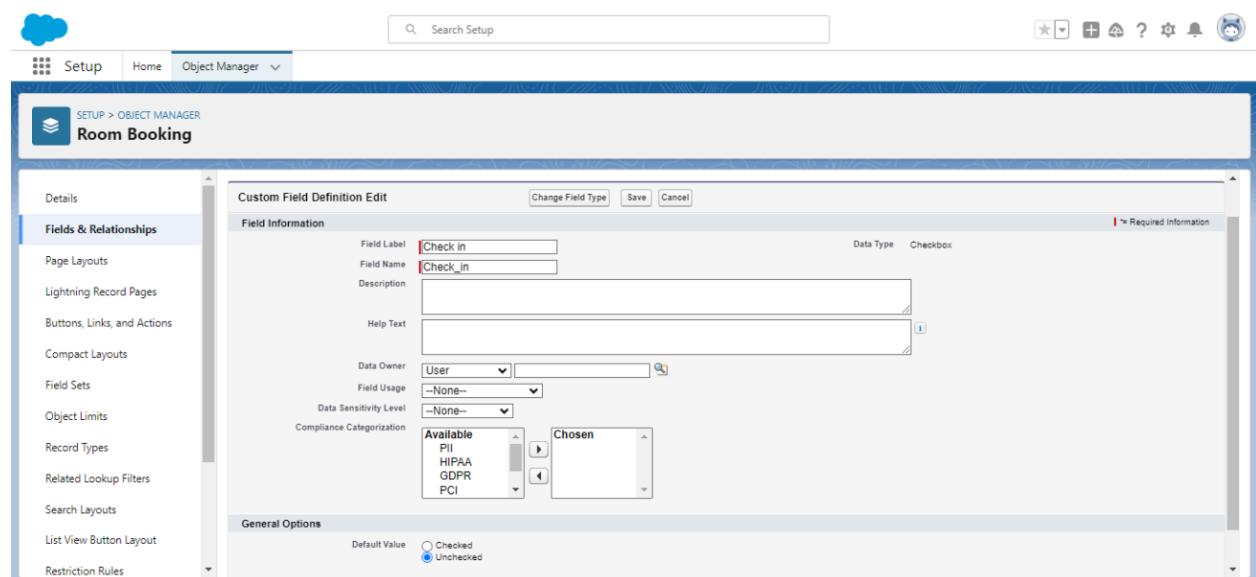
Functions

- All Function Categories --
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

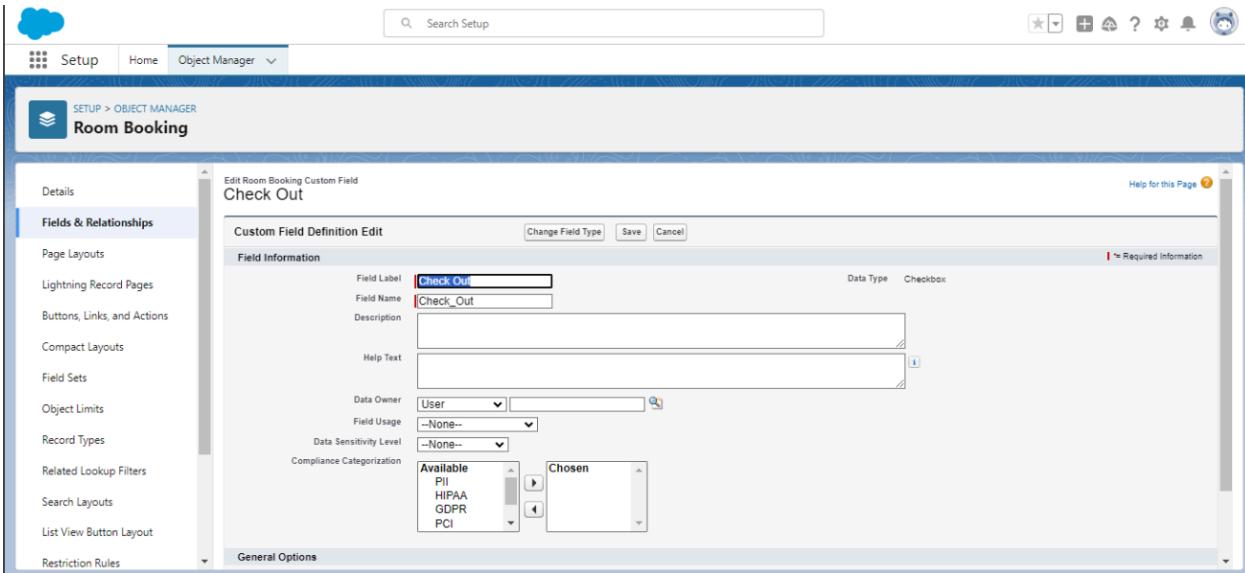
9.To create fields in an object:

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



10. To create fields in an object:

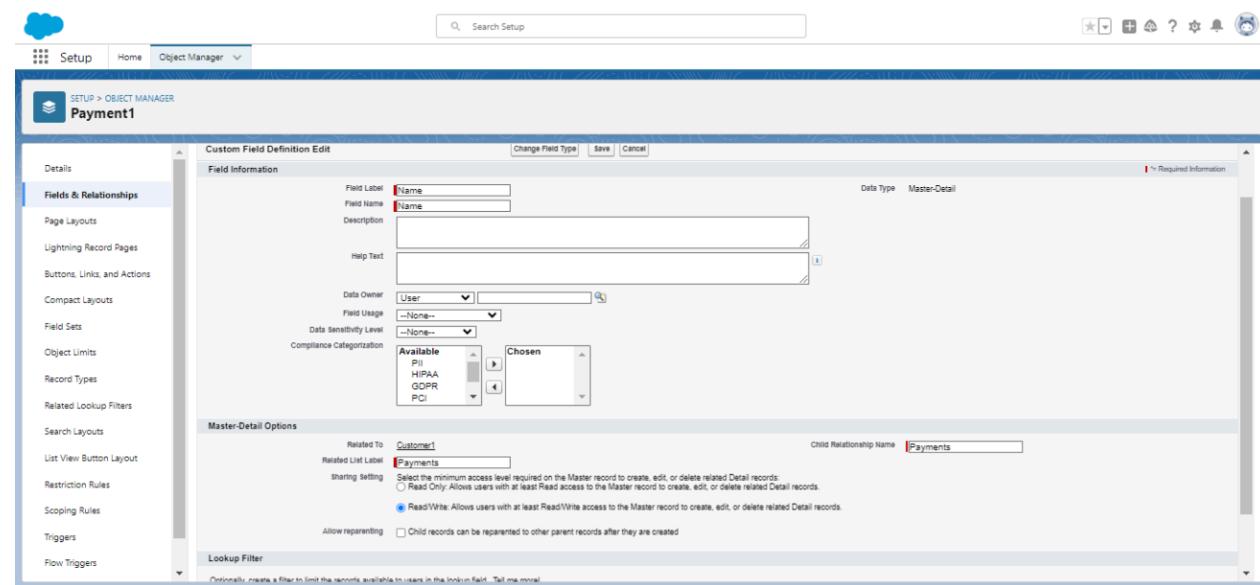
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
 - Field Label: Check Out
 - Field Name :It's gets auto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



Activity 3 - Creation of Fields & Relationship for Payment1 Object

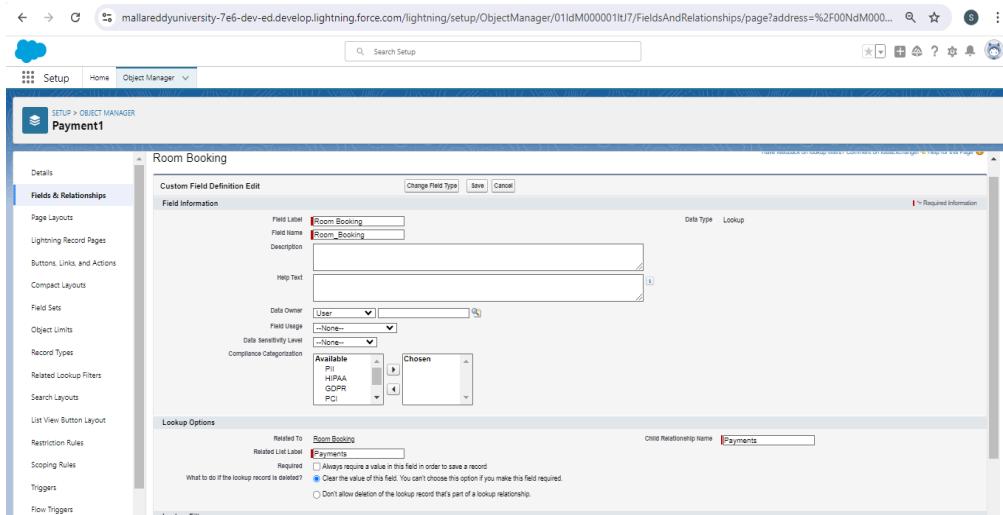
1. To create fields & relationship to an object:

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
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Customer1 object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Name
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.



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

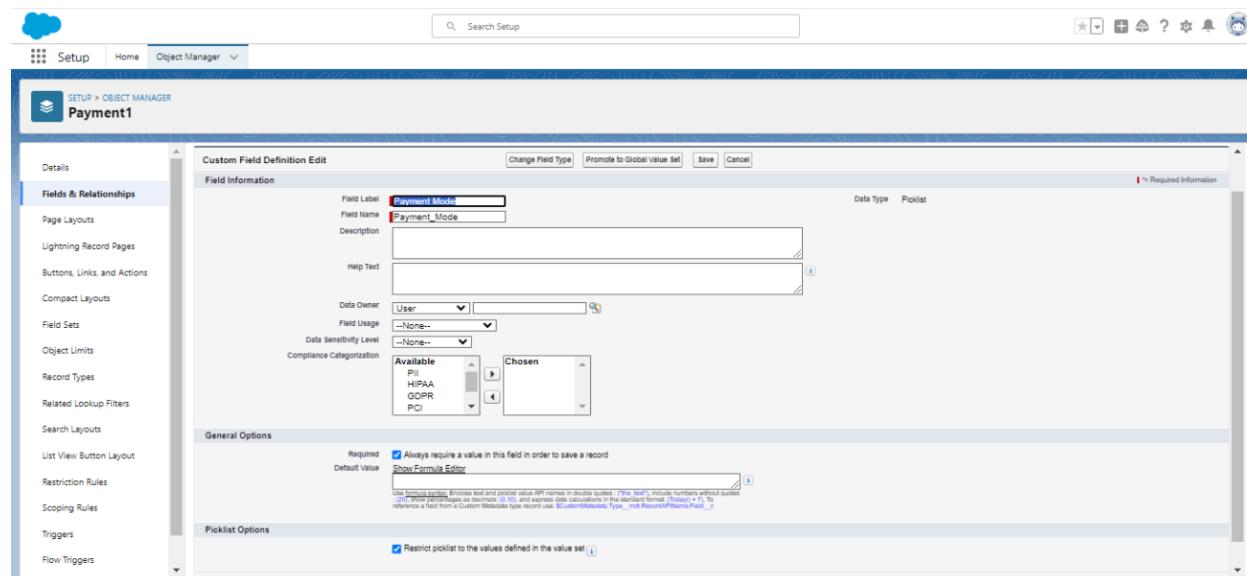
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Room Booking object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Room Booking
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.



. 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
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Payment Mode
 - Value - Select enter values with each value separated by a new line
1. Cash
2. Check
3. Credit card
4. Debit card
5. UPI
6. Phonepe
7. Gpay
8. Paytm
 - Select required
 - Click on Next > Next > Save and new.



Cross Object Formula Field:

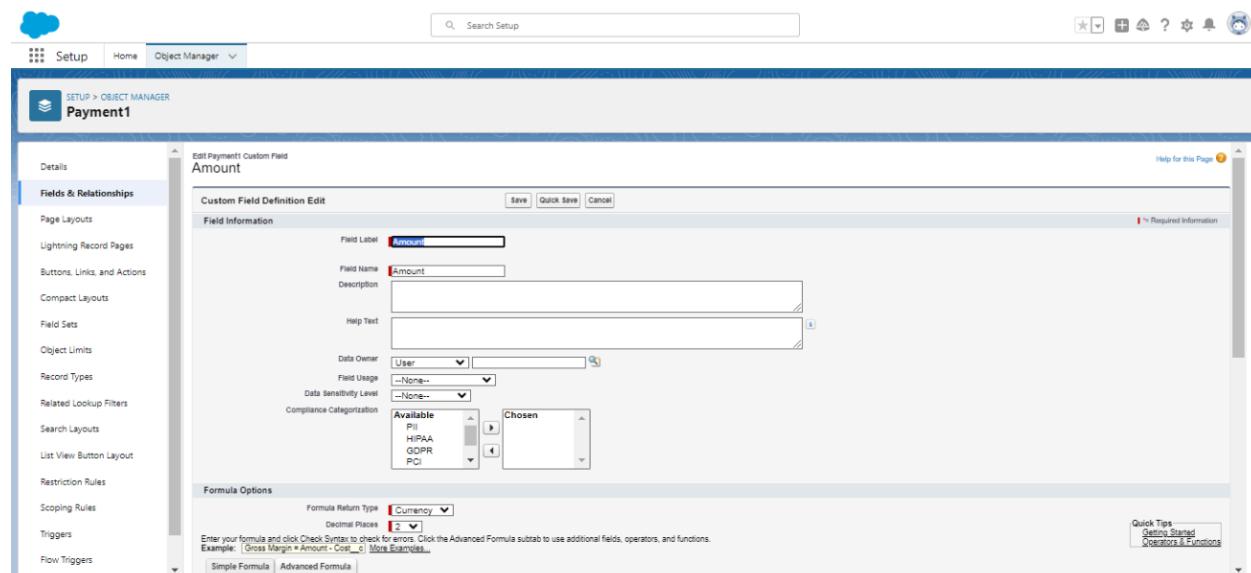
In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

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

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

4. Create a Cross object formula Field in Payment1 Object

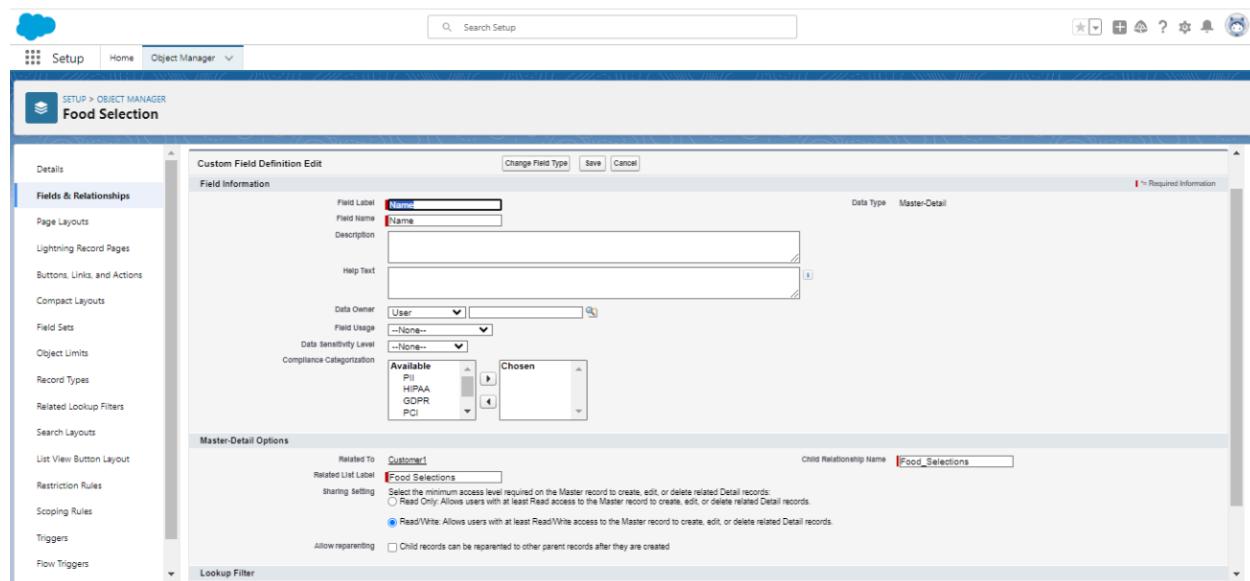
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Formula”
4. Click on Next
5. Enter the Field label: Amount and Field name: gets auto generated and click on Next
6. In the Advanced Formula Click on the Insert field in the popup Screen Select the Payment1 and in the second drop down select the Room Booking and in the three drop down select the Amount field and click on Insert “Room_Booking__r.Amount__c”.
7. Click on the Check syntax: No syntax errors in merge fields
8. Click on Next > Next > Save and new.



Activity 4 - Creation of fields for the Food Selection object

1. To create fields & relationship to an object:

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



Picklist value sets:

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

Create a picklist value set:

1. First click on gear icon and click on setup
2. Click on home tab in the Quick find box search for the “ Picklist value sets ”
3. Click on the Picklist value set and click on new
4. Enter the Label name and API name automatically Generate
5. Enter the values with each value separated by a new line
 - Sunday

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

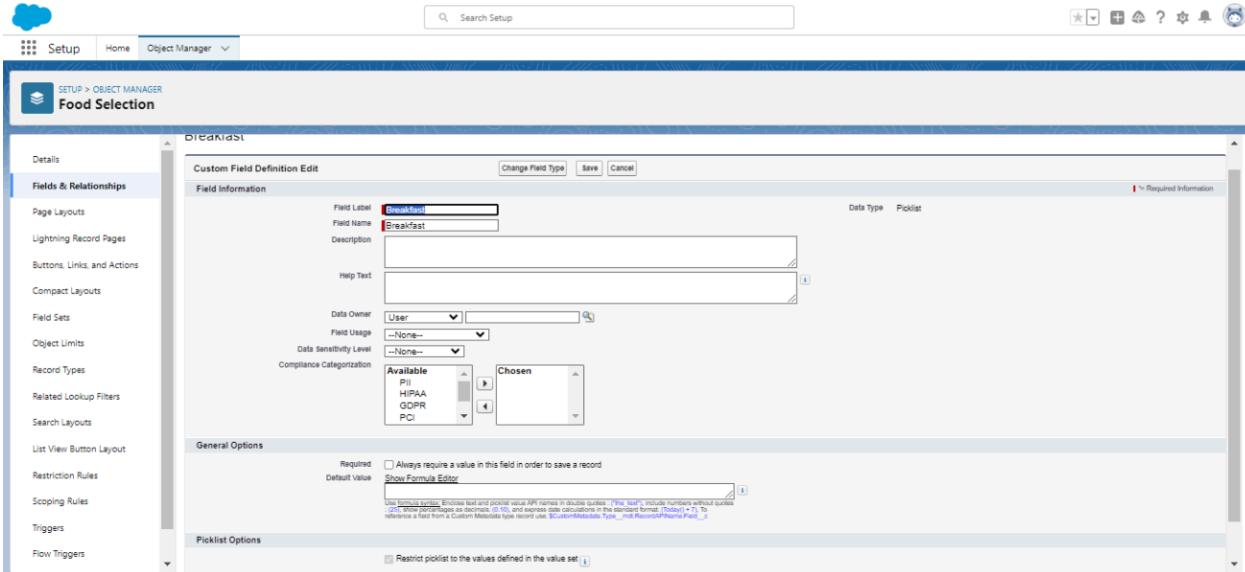
6. Check the Use first value as default value and Click on save.

Action	Value	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Sunday	Sunday	<input checked="" type="checkbox"/>	Assigned dynamically	Dishitha Reddy, 29/07/2024, 1:42 pm
Edit Del Deactivate	Monday	Monday	<input type="checkbox"/>	Assigned dynamically	Dishitha Reddy, 29/07/2024, 1:42 pm
Edit Del Deactivate	Tuesday	Tuesday	<input type="checkbox"/>	Assigned dynamically	Dishitha Reddy, 29/07/2024, 1:42 pm
Edit Del Deactivate	Wednesday	Wednesday	<input type="checkbox"/>	Assigned dynamically	Dishitha Reddy, 29/07/2024, 1:42 pm
Edit Del Deactivate	Thursday	Thursday	<input type="checkbox"/>	Assigned dynamically	Dishitha Reddy, 29/07/2024, 1:42 pm
Edit Del Deactivate	Friday	Friday	<input type="checkbox"/>	Assigned dynamically	Dishitha Reddy, 29/07/2024, 1:42 pm
Edit Del Deactivate	Saturday	Saturday	<input type="checkbox"/>	Assigned dynamically	Dishitha Reddy, 29/07/2024, 1:42 pm

2. Create a picklist Field for Food selection object

To create fields in an object:

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



3. Create 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.
1. Now click on “Fields & Relationships” > New
2. Select Data Type as a “Picklist”
 - a. Fill the Above as following:
 - Field Label: Select Breakfast
 - Under Value - Enter values, with each value separated by a new line
 - a. Idli
 - b. Bonda
 - c. Dosa
 - d. Upma
 - e. Vada
 - f. Puri
 - g. Chapati
 - Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.

Field Dependency:

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

Need to use Field Dependency:

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

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

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

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with navigation links like 'Setup', 'Home', and 'Object Manager'. A search bar at the top says 'Search Setup'. The main area is titled 'SETUP' with a gear icon. It shows a 'Picklist Settings' section under 'Data'. A 'Breakfast' picklist is being edited, with 'Controlling Field' set to 'Breakfast' and 'Dependent Field' set to 'Select Breakfast'. The 'Instructions' section provides tips for using the grid. The grid itself displays breakfast items across days: Sunday (Idli, Bonda, Dosa, Upma, Vada, Puri, Chapati), Monday (Idli, Bonda, Dosa, Upma, Vada, Puri, Chapati), Tuesday (Idli, Bonda, Dosa, Upma, Vada, Puri, Chapati), Wednesday (Idli, Bonda, Dosa, Upma, Vada, Puri, Chapati), and Thursday (Idli, Bonda, Dosa, Upma, Vada, Puri, Chapati). Buttons for 'Save', 'Cancel', and 'Preview' are at the bottom.

4. To create fields in an object:

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

The screenshot shows the Salesforce Object Manager. The left sidebar lists various object settings like 'Page Layouts', 'Buttons, Links, and Actions', etc. The main area shows 'Food Selection' object details. A 'Custom Field Definition Edit' window is open for a field named 'Lunch'. The 'Field Information' tab shows 'Field Label' as 'Lunch', 'Field Name' as 'Lunch', and 'Data Type' as 'Picklist'. The 'General Options' tab includes a checkbox for 'Always require a value in this field in order to save a record'. The 'Available' section of the 'Compliance Categorization' dropdown contains 'PC', 'HIPAA', 'GDPR', and 'PCI', while 'Chosen' contains 'PC'. Buttons for 'Save' and 'Cancel' are at the bottom.

5. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Select Lunch
 - Under Value - Enter values, with each value separated by a new line
1. Meals
2. Chicken biryani
3. Veg biryani
4. Veg fried rice
5. Egg fried rice
6. Chicken fried rice
7. Curd rice
8. Tomato rice
9. Egg noodles
10. Chicken Noodles
11. Bhagara rice
 - Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.

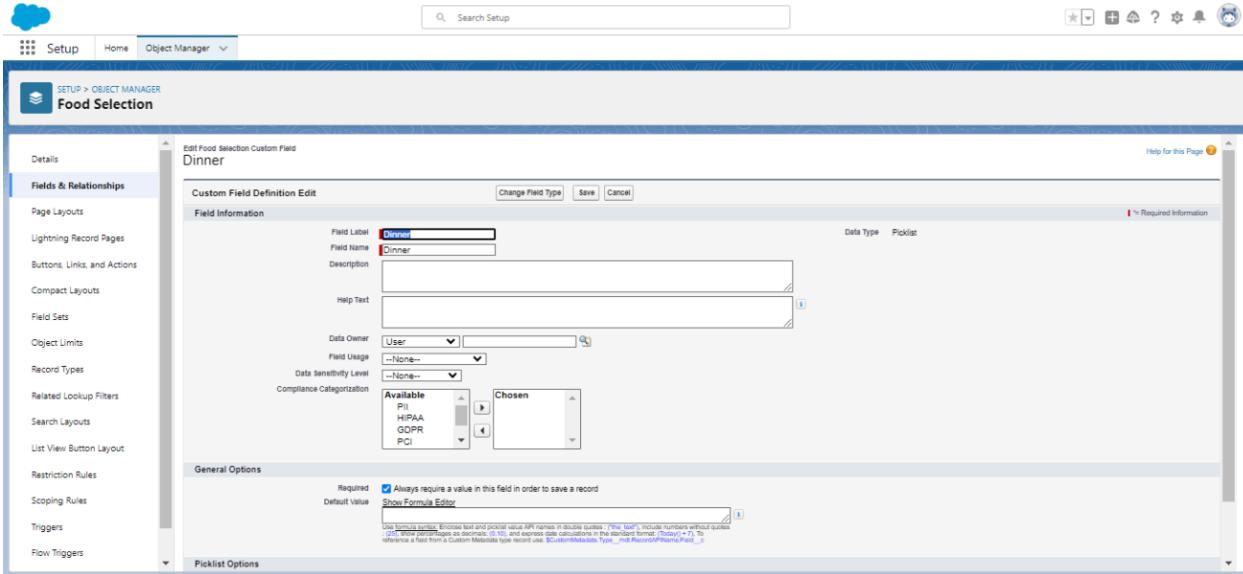
The screenshot shows the Salesforce Object Manager interface for the 'Food Selection' object. The 'Fields & Relationships' tab is active. On the left, a sidebar lists various configuration tabs: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The main content area displays the 'Values' section for the 'Select Lunch' field. The table has columns for Action, Value, API Name, Default, Chart Colors, and Modified By. The values listed are: Meals (API Name: Meals, Default checked, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm); Chicken biryani (API Name: Chicken biryani, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm); Veg biryani (API Name: Veg biryani, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm); Veg fried rice (API Name: Veg fried rice, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm); Egg fried rice (API Name: Egg fried rice, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm); Chicken fried rice (API Name: Chicken fried rice, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm); Curd rice (API Name: Curd rice, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm); Tomato rice (API Name: Tomato rice, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm); Egg noodles (API Name: Egg noodles, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm); Chicken Noodles (API Name: Chicken Noodles, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm); and Bhagara rice (API Name: Bhagara rice, Assigned dynamically, Modified By: Dikshita Ratty 29/07/2024, 1:55 pm). Below the table, an 'Inactive Values' section is shown with a note: 'No inactive Values values defined.' At the bottom right, there is a link 'Always show me more records in related list...'.

To create a Field dependencies for Lunch and Select Lunch.

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

6. To create fields in an object:

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



7. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Select Dinner
 - Under Value - Enter values, with each value separated by a new line
 1. Meals
 2. Chicken biryani
 3. Veg biryani
 4. Veg fried rice
 5. Egg fried rice
 6. Chicken fried rice
 7. Curd rice
 8. Tomato rice
 9. Egg noodles
 10. Chicken Noodles
 11. Bhagara rice
 - 12. Select Checkbox Use First value as default Value
 - 13. Click on Next > Next > Save and new.

Action	Value	API Name	Default	Chart Colors	Modified By
Edit Delete	Meals	Meals	✓	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
Edit Delete	Chicken biryani	Chicken biryani		Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
Edit Delete	Veg biryani	Veg biryani		Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
Edit Delete	Veg fried rice	Veg fried rice		Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
Edit Delete	Egg fried rice	Egg fried rice		Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
Edit Delete	Chicken fried rice	Chicken fried rice		Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
Edit Delete	Curd rice	Curd rice		Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
Edit Delete	Tomato rice	Tomato rice		Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
Edit Delete	Egg noodles	Egg noodles		Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
Edit Delete	Chicken Noodles	Chicken Noodles		Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
Edit Delete	Bhagara rice	Bhagara rice		Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm

To create a Field dependencies for Dinner and Select Dinner.

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: Dinner, Dependent Field: Select Dinner and Click on Continue
5. Under the Sunday Ctrl and select the Picklist values Chicken biryani, curd rice, Chicken noodles and Click on Include Values in such a way that do for the remaining days and click on save.

Dinner:	Sunday	Monday	Tuesday	Wednesday	Thursday
Select Dinner:	Meals	Meals	Meals	Meals	Meals
	Chicken biryani				
	Veg biryani				
	Veg fried rice				
	Egg fried rice				
	Chicken fried rice				
	Curd rice				
	Tomato rice				
	Egg noodles				
	Chicken Noodles				
	Bhagara rice				

Activity 5-Creation of fields for the Feedback object

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
3. Select Data Type as a “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Customer1 object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Name
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

2. To create Another fields in an Same object:

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.
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: Roomcleaning
 - Field Name :It's gets auto generated
 - Under Values select Enter values, with each value separated by a new line
 1. Good
 2. Satisfaction
 3. Bad
 - Click on Next > Next > Save and new.

3. To create a Another Fields in an Same Object

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

4. To create a Another Fields in an Same Object

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

5. To create a Another Fields in an Same Object

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

Activity 6 -Creation of fields for the Total Rooms object

1. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Total Rooms) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
5. Field Label: Rooms Available
6. Field Name : It’s gets auto generated
7. Select the Formula Return Type as “Number”
8. Select the Decimal places as “0” and Click on Next

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

Rooms Object.

9. Click on the Advanced Formula “ 30 - Rooms_Booked__c ” and Check Syntax

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

The screenshot shows the 'Custom Field Definition Edit' screen for the 'Rooms Available' field. The 'Field Label' is 'Rooms Available', 'Field Name' is 'Rooms_Available', and 'Description' is empty. 'Data Owner' is set to 'User'. 'Field Usage' and 'Data Sensitivity Level' are both set to '--None--'. Under 'Compliance Categorization', 'Available' includes PII, HIPAA, GDPR, and PCI, while 'Chosen' is empty. In the 'Formula Options' section, 'Formula Return Type' is 'Number', 'Decimal Places' is 0, and the formula 'Rooms Available (Number) =' is defined as '10 - Rooms_Booked__c'. The 'Advanced Formula' subtab is selected. A 'Check Syntax' button is visible at the bottom left of the formula editor.

The screenshot shows the 'Check Syntax' results for the formula 'Rooms Available (Number) = 10 - Rooms_Booked__c'. The syntax is valid. The 'Blank Field Handling' section indicates that blank fields are treated as zeros. At the bottom, there are 'Save', 'Quick Save', and 'Cancel' buttons.

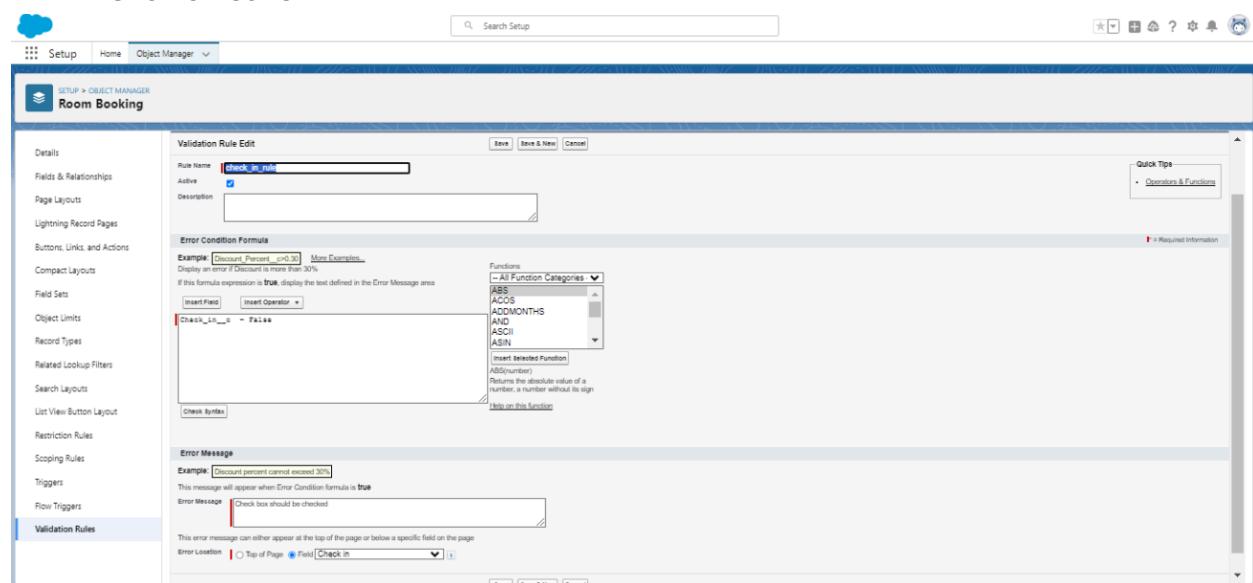
Task - 6 Validation rule

Introduction:

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

Activity 1 - Create a validation rule to an Room Booking Object

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Validation rule” at top > New.
3. Enter Rule name “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)
7. Click on save.



create a Another validation rule to an Room Booking Object

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

- search bar > click on the object.
2. Now click on “Validation rule” at top > New.
 3. Enter Rule name “check in rule” and make the validation should be Active.
 4. Enter the formula in the formula Box “ Check_in_c = False ” and check for syntax error.
 5. Enter the error message “Check box should be checked”
 6. Select error location as field(Check in)

The screenshot shows the 'Validation Rule' configuration screen in Salesforce. The 'Rule Name' is 'check_in_rule' (1). The 'Active' checkbox is checked. In the 'Error Condition Formula' section, the formula 'Check_in_c = False' is entered (2). In the 'Error Message' section, the message 'Check box should be checked' is entered (3). The 'Error Location' dropdown is set to 'Field [Check in]' (4).

7. Click on save.

Task - 7 Profile

Introduction:

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.

Activity 1- Custom user Profile

To create a new profile:

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

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

The screenshot shows the Salesforce Setup interface under the Profiles section. A specific profile named 'Custom User' is being edited. In the 'Custom App Settings' section, numerous checkboxes are present for various standard tabs and apps, such as All Tabs, Analytics Studio, App Launcher, Automation, Bolt Buttons, co-living, Community, Content, Data Manager, Digital Experiences, Lightning app, Marketing CRM Classic, Queue Management, Sales, Sales Console, Salesforce Chatter, Salesforce Scheduler, Sample Console, Service, Service Console, Site.com, and Subscription Management.

The screenshot shows the same Salesforce Setup interface under the Profiles section, focusing on the 'Custom Object Permissions' section. It lists several custom objects: Customers, Feedbacks, Food Selections, Payments, Room Bookings, and Total Rooms. For each, there are checkboxes for Read, Create, Edit, Delete, View All, and Modify All, all of which are checked, indicating 'All Access' permissions.

Activity 2 - Custom platform user1

To create a new profile:

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

4. Scroll down to Custom Object Permissions and Give only Read access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.
5. Scroll down and Click on Save.

The screenshot shows the Salesforce Setup interface for managing profiles. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows 'Users' and 'Profiles' selected. A search bar at the top right says 'Search Setup'. The main content area is titled 'SETUP Profiles'. It displays a grid of objects with permission checkboxes. For 'Custom Object Permissions', specific checkboxes are checked for 'Read' and 'View All' across several objects. Below this, there are sections for 'Session Settings' and 'Password Policies' with various configuration options like password expiration and complexity rules.

Activity 3- Custom platform user2

To create a new profile:

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main area contains several sections:

- Object Permissions:** A grid showing permissions for various objects like Contacts, Push Topics, and User External Credentials.
- Custom Object Permissions:** A detailed grid for specific objects like Customers, Feedbacks, and Food Selections, defining permissions for Read, Create, Edit, Delete, View All, and Modify All.
- Session Settings:** Set to '2 hours of inactivity' and 'None' for session security level.
- Password Policies:** Configuration for password expiration, history, complexity, and login attempts.

Task - 8 Roles

Introduction:

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.

Activity 1 - 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.
3. Give Label as "Marketing" and Role name gets auto populated.
4. Then click on Save.

Search Setup

Setup Home Object Manager

role

Users Roles Feature Settings Sales Service Case Teams

Contact Roles on Contracts Contact Roles on Opportunities Case Team Roles Contact Roles on Cases

Marketing

Role Edit

Label Marketing

Role Name Marketing

This role reports to CEO

Role Name as displayed on reports

Save Save & New Cancel

Activity 2 -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.
4. Then click on Save.

Search Setup

Setup Home Object Manager

role

Users Roles Feature Settings Sales Service Case Teams

Contact Roles on Contracts Contact Roles on Opportunities Case Team Roles Contact Roles on Cases

Receptionist

Role Edit

Label Receptionist

Role Name Receptionist

This role reports to CEO

Role Name as displayed on reports

Save Save & New Cancel

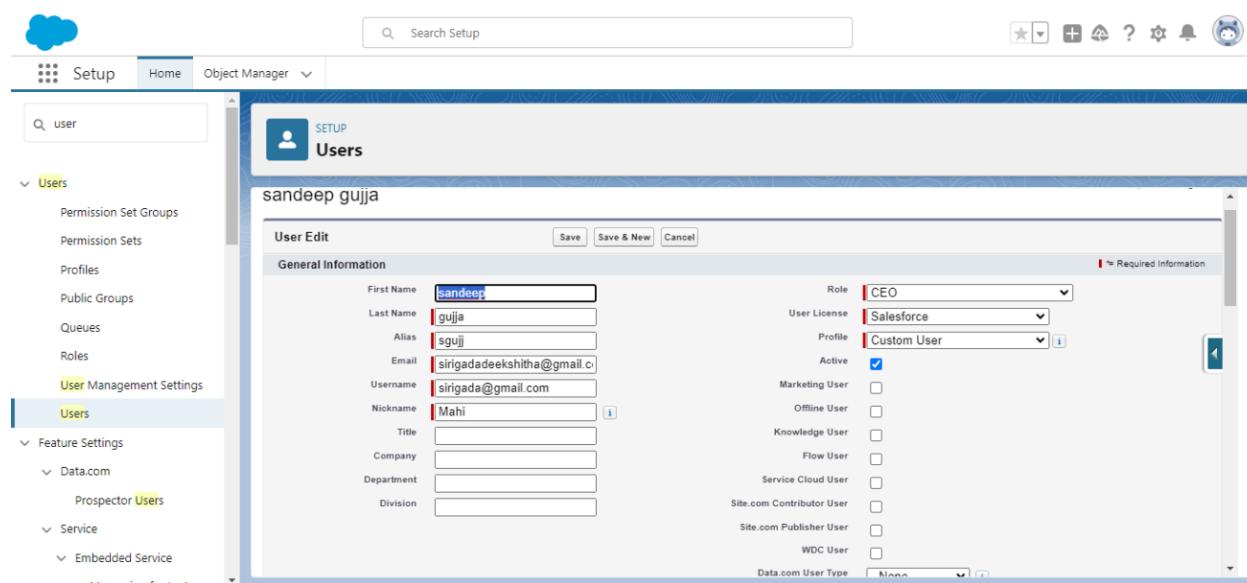
Task - 9 Users

Introduction:

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.

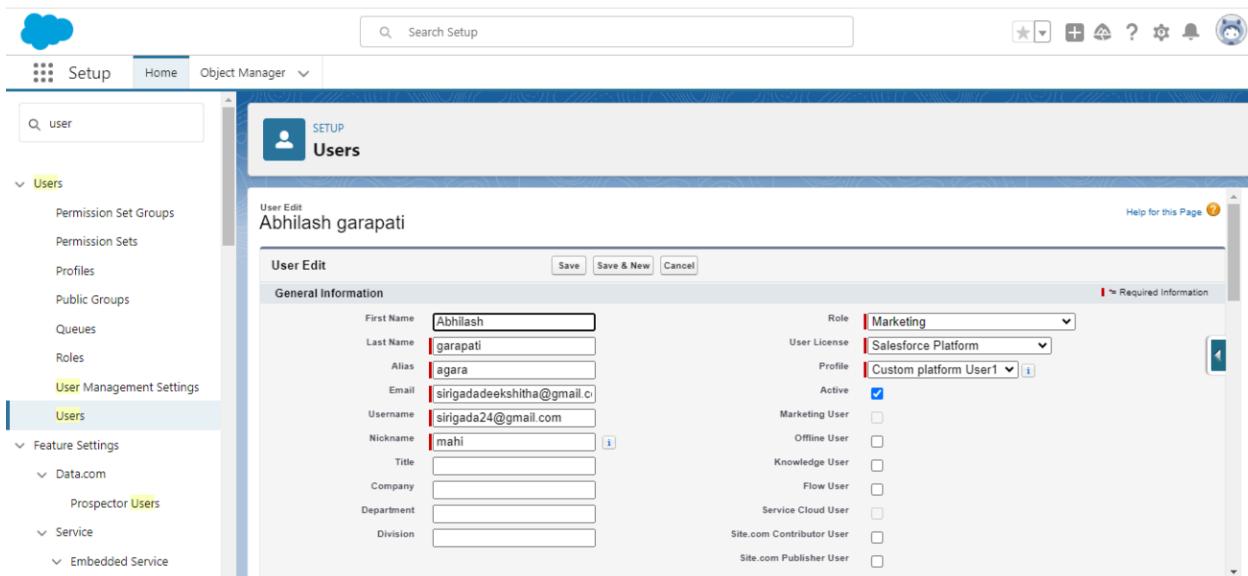
Activity 1- Create User

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



Activity 2 - Create Another User

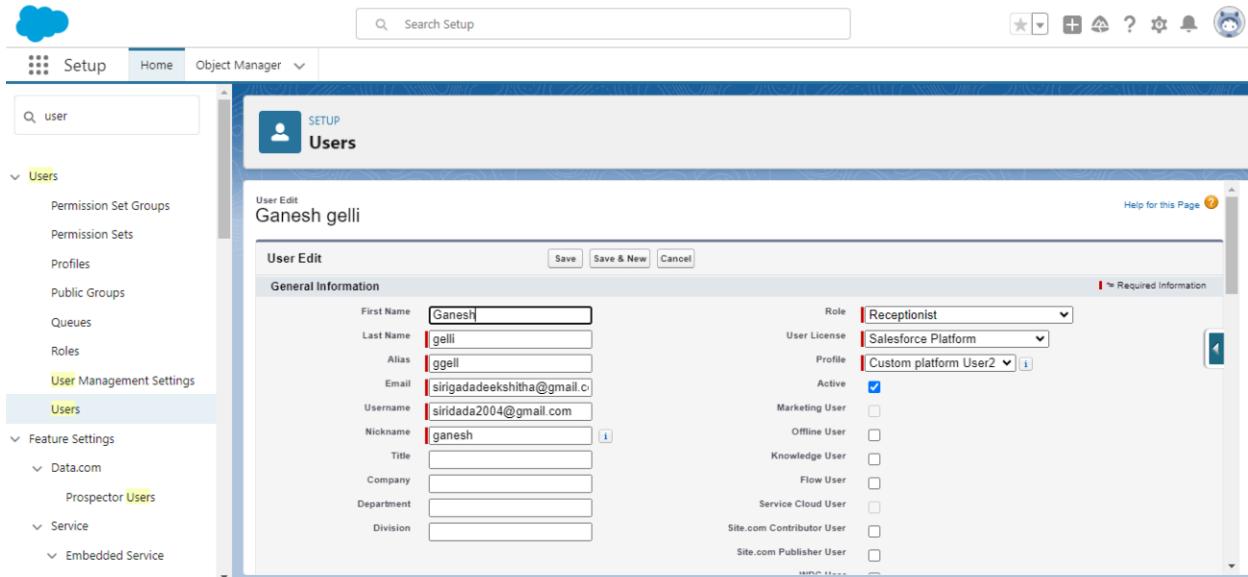
1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : Abhilash
 - Last Name : garapati
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.com
 - Nick Name : Give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



Activity 3 - Create Another User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : Ganesh
 - Last Name : gelli
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.com

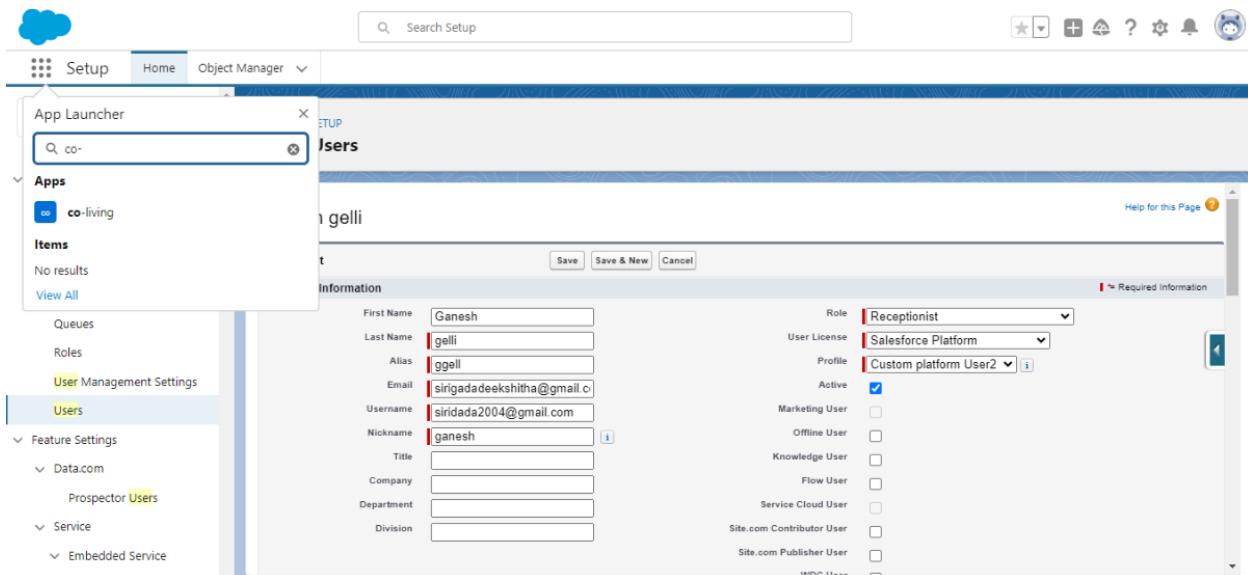
- Nick Name: Give a Nickname
 - Role : Receptionist
 - User licence: Salesforce Platform
 - Profiles : Custom Platform user2
3. Save



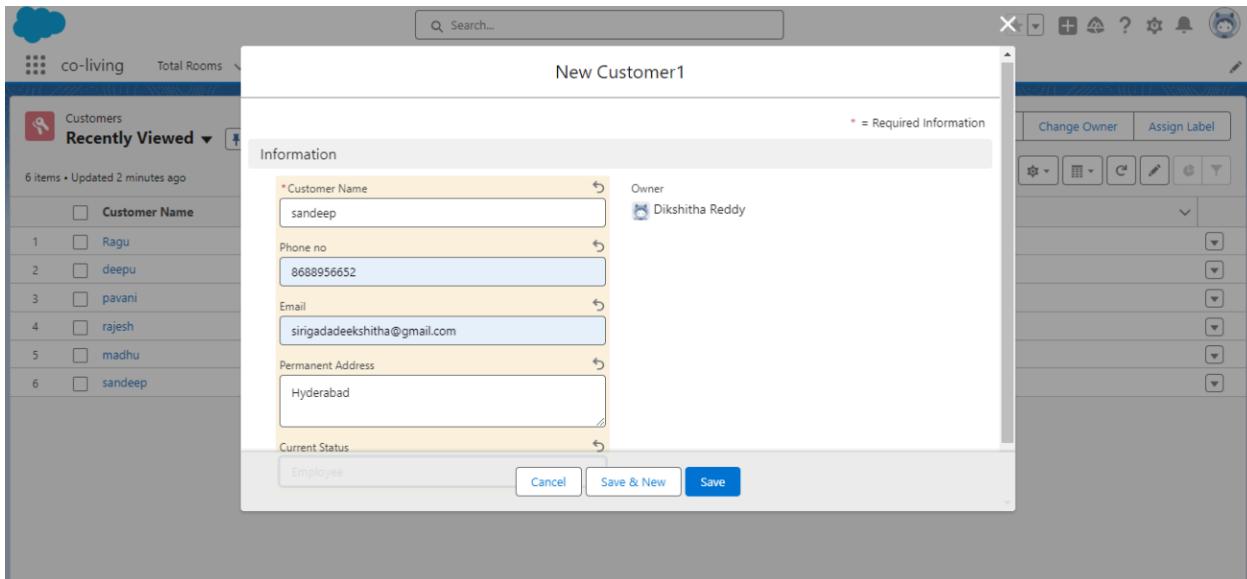
Task - 10 User Adoption

Activity 1 -Create a Record (Customers)

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

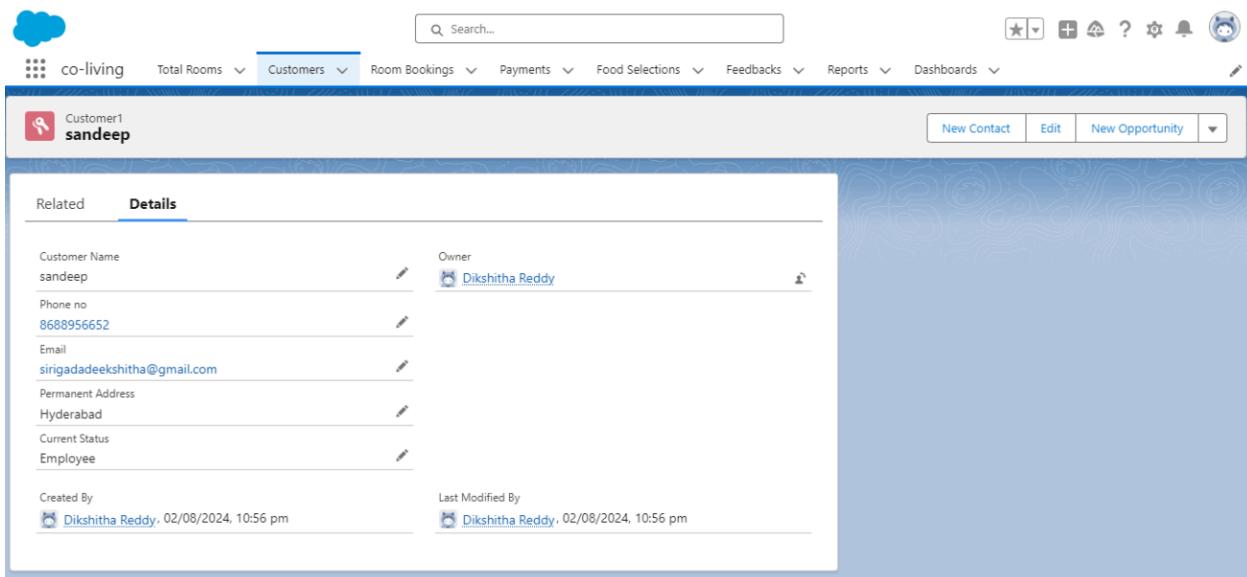


3. Click on the Customers Tab.
4. Click new and fill details & Save



Activity 2 -View a Record (Customers)

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



Activity 3 - Delete a Record (Customers)

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

The screenshot shows the Salesforce interface with the 'Customers' tab selected. The list view displays 7 items, all updated a few seconds ago. The first item, 'sandeep', has a checkbox and a small icon next to it. A context menu is open over this row, with the 'Delete' option highlighted by a red box. Other options in the menu include 'Edit', 'Change Owner', and 'Edit Labels'. The top navigation bar includes links for Total Rooms, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. There are also standard toolbar icons like New, Import, Change Owner, and Assign Label.

	Customer Name
1	sandeep
2	Ragu
3	deepu
4	pavani
5	rajesh
6	madhu
7	sandeep

Task - 11 Reports

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

Types of Reports in Salesforce

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

Activity 1 - Create Report

1. Go to the app > click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel

"Customers with Room Bookings with Total Rooms " > click on start report.

4. Customize your report
5. Add fields from left pane as shown below
6. Save or run it.

The screenshot shows a reporting interface with a top navigation bar and a main content area. The top bar includes icons for search, filters, and various system functions. The main content area displays a table titled 'Customers with Room Bookings and Total Rooms'. The table has columns for Customer Name, Total No Of Rooms, Room Booking: Room No, Phone no, Email, Permanent Address, Current Status, Room Sharing, and Advance Payment for 1 Month. The data is grouped by customer name, with subtotals for each group. The table shows five entries: deepu (5 rooms, RN-004, RN-005), parani (1 room, RN-003), Ragu (1 room, RN-002), sandeep (1 room, RN-001), and a total row. On the left side, there is a sidebar with sections for 'Outline' (highlighted), 'Groups', 'Columns', and a search bar. The 'Groups' section contains 'GROUP ROWS' and 'Customer: Customer Name'. The 'Columns' section lists 'Total No Of Rooms: Total No C', 'Room Booking: Room No', 'Phone no', 'Email', 'Permanent Address', 'Current Status', 'Room Sharing', and 'Advance Payment for 1 Mon'. The 'Outline' section shows the structure of the report with various levels of grouping.

Customer Name	Total No Of Rooms	Room Booking: Room No	Phone no	Email	Permanent Address	Current Status	Room Sharing	Advance Payment for 1 Month
deepu	5	RN-004	9912765243	deepu@gmail.com	kammareddy	Employee	Double sharing	<input checked="" type="checkbox"/>
	5	RN-005	9912765243	deepu@gmail.com	kammareddy	Employee	Double sharing	<input checked="" type="checkbox"/>
Subtotal								2
parani	1	RN-003	8767865645	pavani@gmail.com	hyderabad	Employee	Single sharing	<input checked="" type="checkbox"/>
Subtotal								1
Ragu	1	RN-002	8812546543	ragu23@gmail.com	hyderabad	Employee	Double sharing	<input checked="" type="checkbox"/>
Subtotal								1
sandeep	1	RN-001	9703402723	sandeep@gmail.com	hyderabad	Employee	Single sharing	<input checked="" type="checkbox"/>
Subtotal								1
Total								5

Activity 2- Create another Report

1. Go to the app > click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel
Select customer with Room booking with Payments ? click on start report.
4. Customize your report
5. Add fields from left pane as shown Above
6. Save or run it.

Customer1: Customer Name										Payment1: Payment No.	Room Booking: Room No.	Phone no.	Email	Permanent Address	Current Status	Room Booking: Room Sharing	Room Booking: Advance Payme
deepu										PNO-002	RN-003	9912785243	deepu@gmail.com	kammareddy	Employee	Single sharing	<input checked="" type="checkbox"/>
madhu										PNO-005	RN-003	8945367223	madhu@gmail.com	karnule	Employee	Single sharing	<input checked="" type="checkbox"/>
pavani										PNO-004	RN-001	8767865645	pavani@gmail.com	hyderabad	Employee	Single sharing	<input checked="" type="checkbox"/>
Ragu										PNO-001	RN-004	8812546243	ragu23@gmail.com	hyderabad	Employee	Double sharing	<input checked="" type="checkbox"/>
rajesh										PNO-003	RN-002	9758345673	rajesh@gmail.com	hyderabad	Employee	Double sharing	<input checked="" type="checkbox"/>
Subtotal																1	
Subtotal																1	
Subtotal																1	
Subtotal																1	
Subtotal																1	
Total																4	

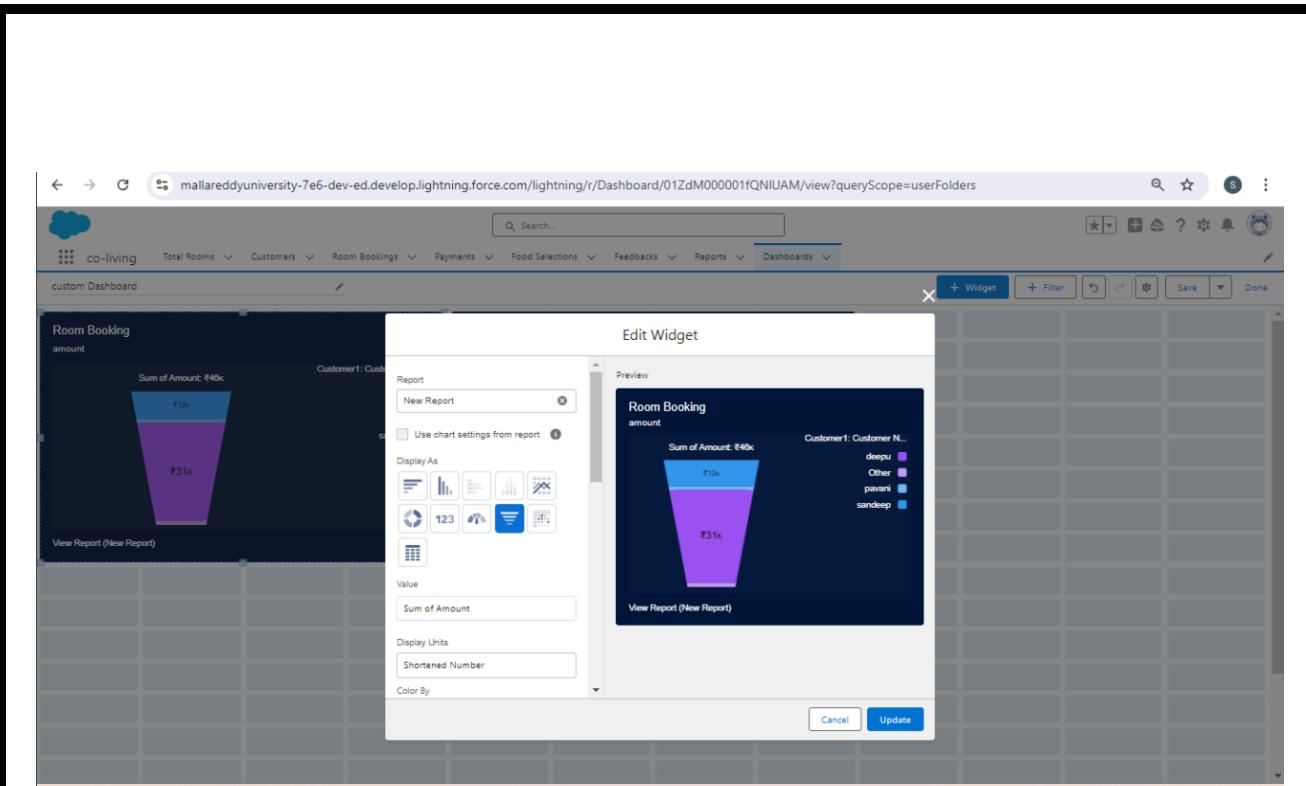
Task - 12 Dashboards

Introduction:

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.

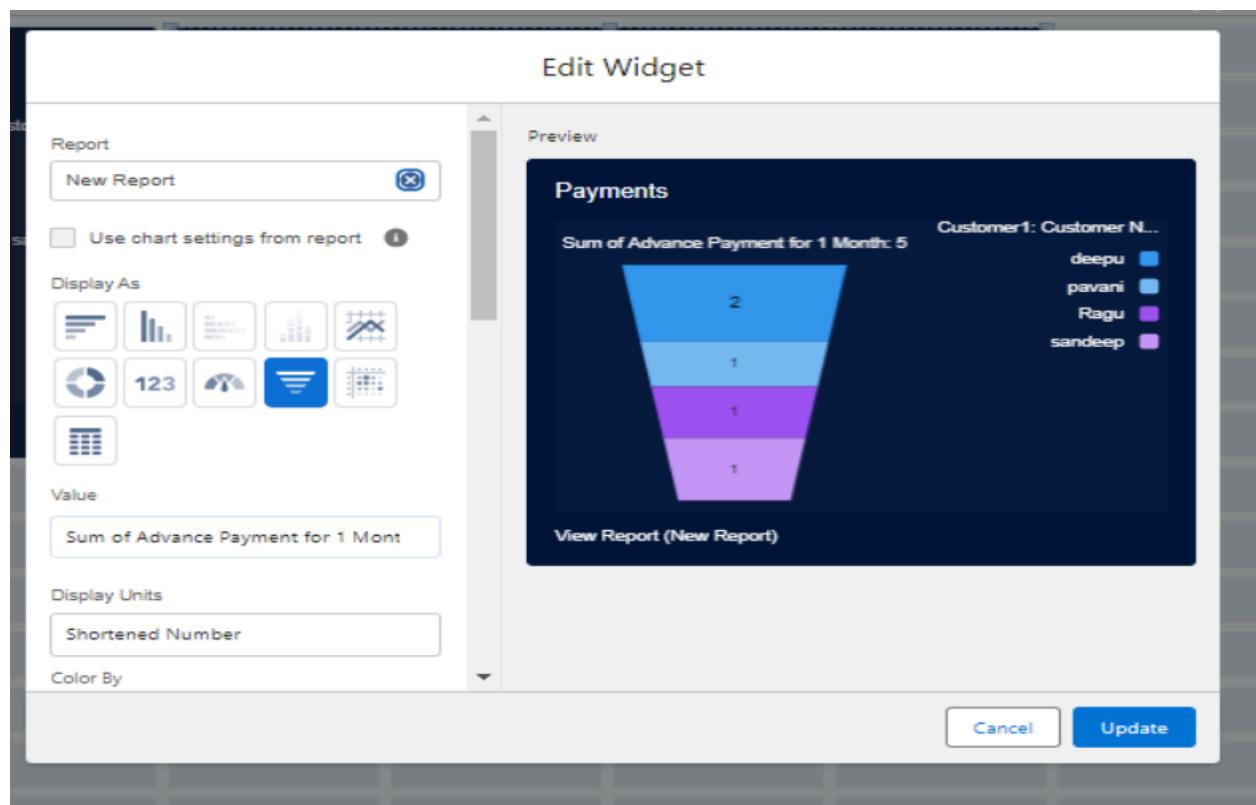
Activity 1- Create Dashboard

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



Activity 2 - 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.



Task - 13 Flows

Introduction:

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:

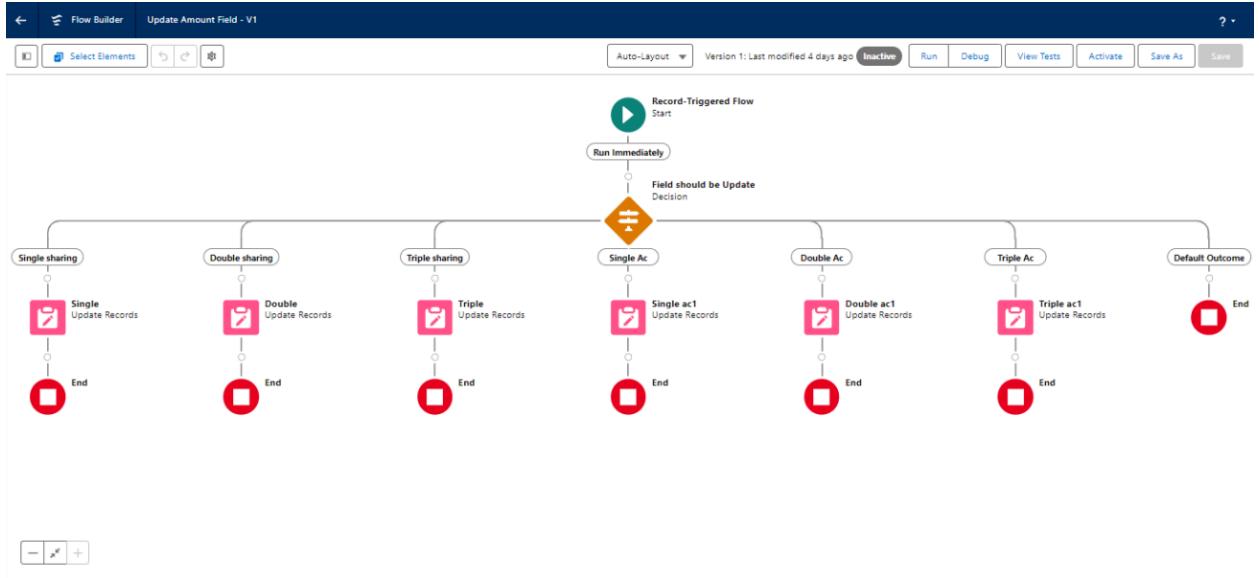
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

Activity 1 - Create a Flow

1. Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a Room Booking in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.
6. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Decision Element".
7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Single sharing.
 - Click on "Add Condition"
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on "+" Symbol In the Outcome Order.
9. Enter the Outcome Details Label: Double sharing, Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Double sharing.
 - Click on "Add Condition"
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on "+" Symbol In the Outcome Order.
10. Enter the Outcome Details Label: Triple sharing, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Triple sharing.
 - Click on "Add Condition"
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on "+" Symbol In the Outcome Order.
11. Enter the Outcome Details Label: Single Ac, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Single sharing.
 - Click on "Add Condition"
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select True.
 - Click on "+" Symbol In the Outcome Order.
12. Enter the Outcome Details Label: Double Ac, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Double sharing.
 - Click on "Add Condition"
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select True.
 - Click on "+" Symbol In the Outcome Order.
13. Enter the Outcome Details Label: Triple Ac, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Triple sharing.
 - Click on "Add Condition"
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select True.
 - Click on Done.
14. Click on "+" Symbol under the single sharing and Select the "update Records" in the drop down list.
15. Enter the update records details
- Label: Single.

- API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 28000.
 - Click on Done.
16. Enter the update records details
- Label: Double.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 24000.
 - Click on Done.
17. Enter the update records details
- Label: Triple.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 20000.
 - Click on Done.
18. Enter the update records details
- Label: Single ac1.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 34000.
 - Click on Done.
19. Enter the update records details
- Label: Double ac1.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 30000.
 - Click on Done.
20. Enter the update records details
- Label: Triple ac1.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 26000.
 - Click on Done.
21. The Flow will Form like This and Click on save.
22. Enter the Flow Label: Update Amount Field, Flow API Name: Gets Automatically Generated and Click on Save.



Activity 2 -Test the Flow

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

Room No	RN-005
Room Sharing	Double sharing
Name	deepu
AC-3000	AC-3000
Advance Payment for 1 Month	Advance Payment for 1 Month
Total No Of Rooms	50
Rooms Available	25
Check in	checked
Check Out	checked
Amount	\$30,000
Created By	Dikshitha Reddy, 29/07/2024, 5:25 pm
Last Modified By	Dikshitha Reddy, 29/07/2024, 5:25 pm

By process mentioned above, A CRM Application to Manage the Booking of Co-Living had finished .

Thank you