A CRM APPLICATION TO MANAGE THE BOOKING OF CO -LIVING

By

Veduruparthi Deva Kota Surya Rama Rajesh

suryateja0261@gmail.com

PROJECT ABSTRACT

A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING

In today's fast-paced urban environment, co-living spaces have emerged as a popular solution for affordable and community-oriented living. This project aims to develop a Customer Relationship Management (CRM) application tailored specifically for managing the booking and administration of co-living spaces.

Our objective is to simplify the booking process for tenants, allowing them to easily search for available spaces, view details, and make reservations and to maintain comprehensive records of tenants, including personal information, lease agreements, and payment history also to efficiently manage the availability and maintenance of co-living spaces, ensuring optimal occupancy rates and provide detailed analytics and reporting tools to help management make informed decisions regarding space utilization and tenant satisfaction.

INDEX PAGE

1.Salesforce

INTRODUCTION:

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage their relationships with customers and streamline various business processes. Here's a brief introduction:

What is Salesforce?

Salesforce is designed to help companies:

- ➤ Find more prospects
- ➤ Close more deals
- ➤ Provide exceptional customer service

Key Features:

- **CRM Capabilities:** Salesforce consolidates all customer information in one place, providing a 360-degree view of each customer. This helps businesses understand their customers better and tailor their services accordingly.
- **Automation:** It automates repetitive tasks and workflows, improving productivity and efficiency.
- **Customization:** Businesses can customize Salesforce to fit their specific needs, from sales and marketing to customer service and beyond.
- **Integration:** Salesforce can integrate with various other systems and applications, making it a versatile tool for businesses of all sizes.
- **AI Integration:** With tools like Einstein AI, Salesforce provides predictive analytics and insights to help businesses make smarter decisions.

Popular Products:

- **Sales Cloud:** Focuses on sales automation and CRM.
- **Service Cloud:** Enhances customer service and support.
- **Marketing Cloud**: Manages marketing campaigns and customer engagement.
- **Commerce Cloud**: Supports e-commerce and online sales.
- **Tableau:** Provides data visualization and business intelligence.

You can know more about salesforce by going through this video:

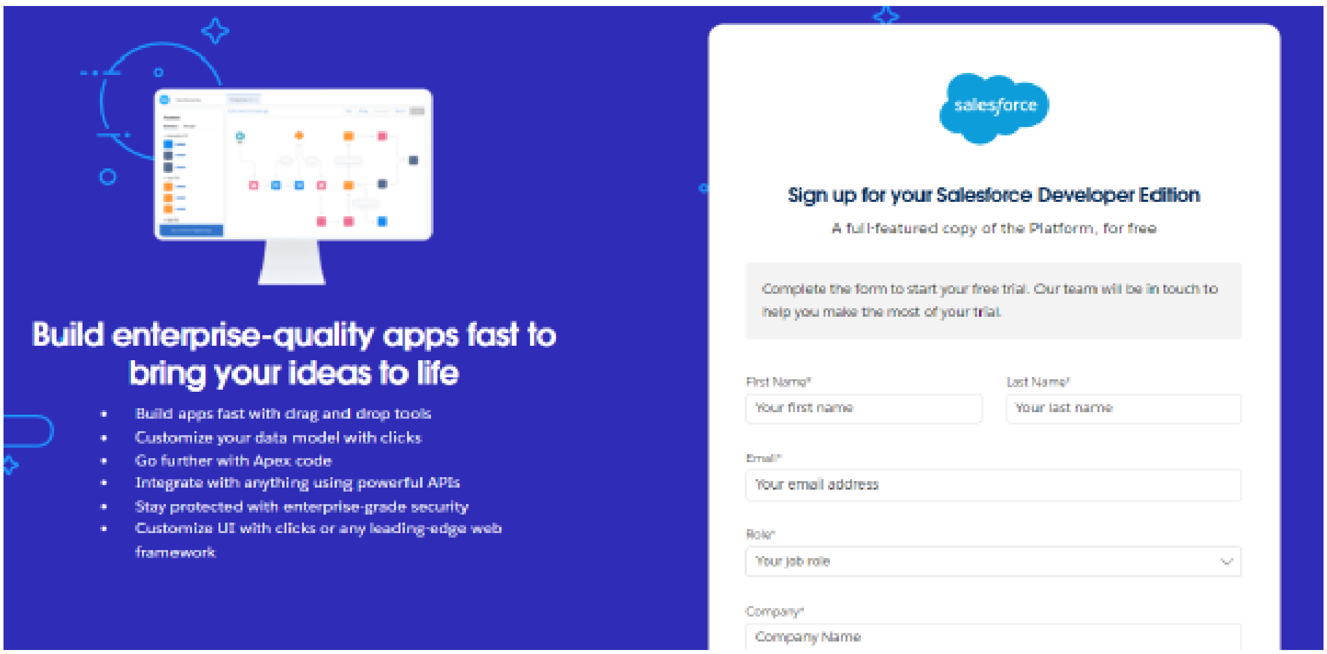
https://youtu.be/EfK0SURQ8X0?si=Gj8ICAUcC78xpGWr

SALESFORCE:

- ➤ Creating Developer Account
- ➤ Account Activation

TASK 1 :- Creating Developer Account
Creating a developer org in salesforce.

1.Go to https://developer.salesforce.com/signup
2. On the sign up form, enter the following details :

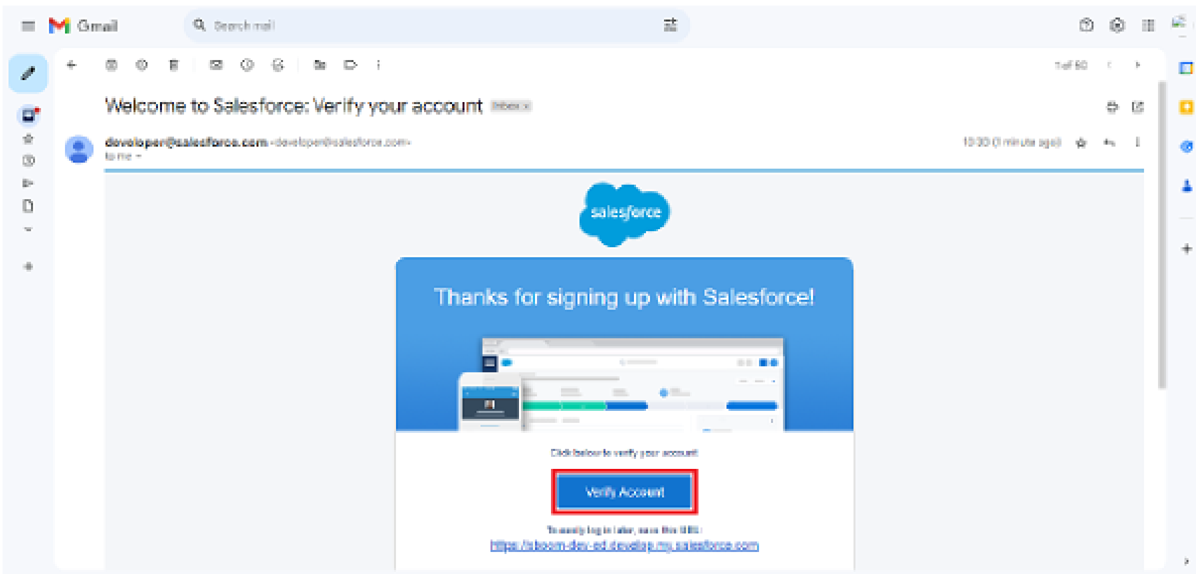


1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

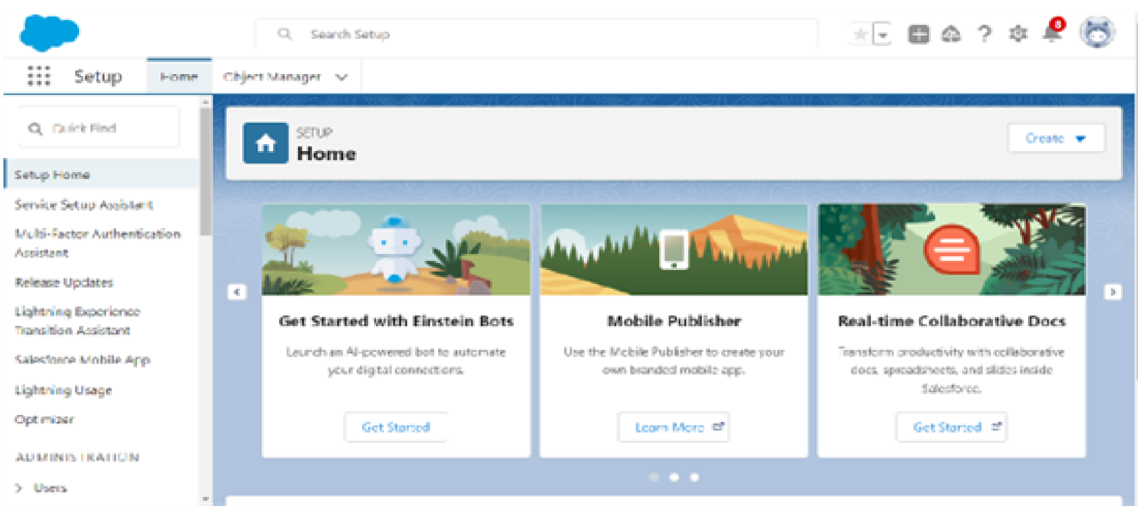
Username : should be a combination of your name and company This need not be an actual email id, you can give anything in the format : username@organization.com
Click on sign me up after filling these.

TASK 2 :- AccountActivation

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



2. Clickon Verify Account
3. Give a passwordand answer a security questionand click on change password.
4. Then you will redirect to your salesforce setup page.



2. Object

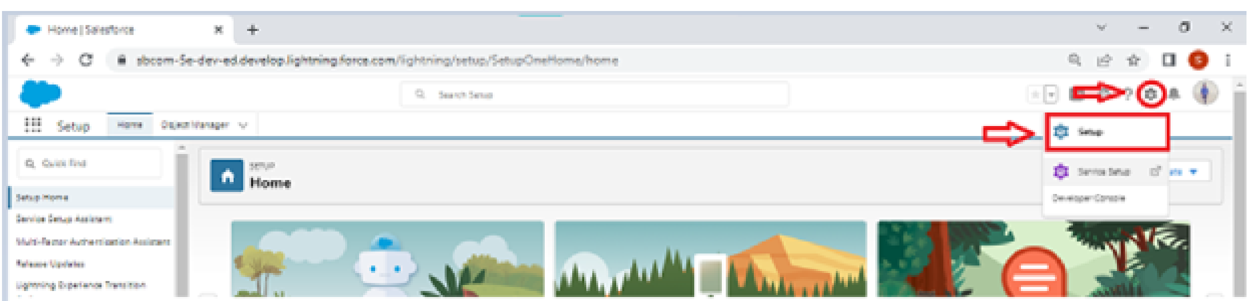
INTRODUCTION :-

What Is an Object?

Salesforce objects are database tables that permit you to store data that isspecific to an organization. What are the types of Salesforce objects Salesforce objects are of two types:

1. Standard Objects: Standardobjects are the kind of objects that are providedby 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 essentialto their organization. Theyare the heart of any application and provide a structure for sharing data.

To Navigate to Setup page: Click on gear icon click setup.



Objects and fieldsinvolved in Co-Living:

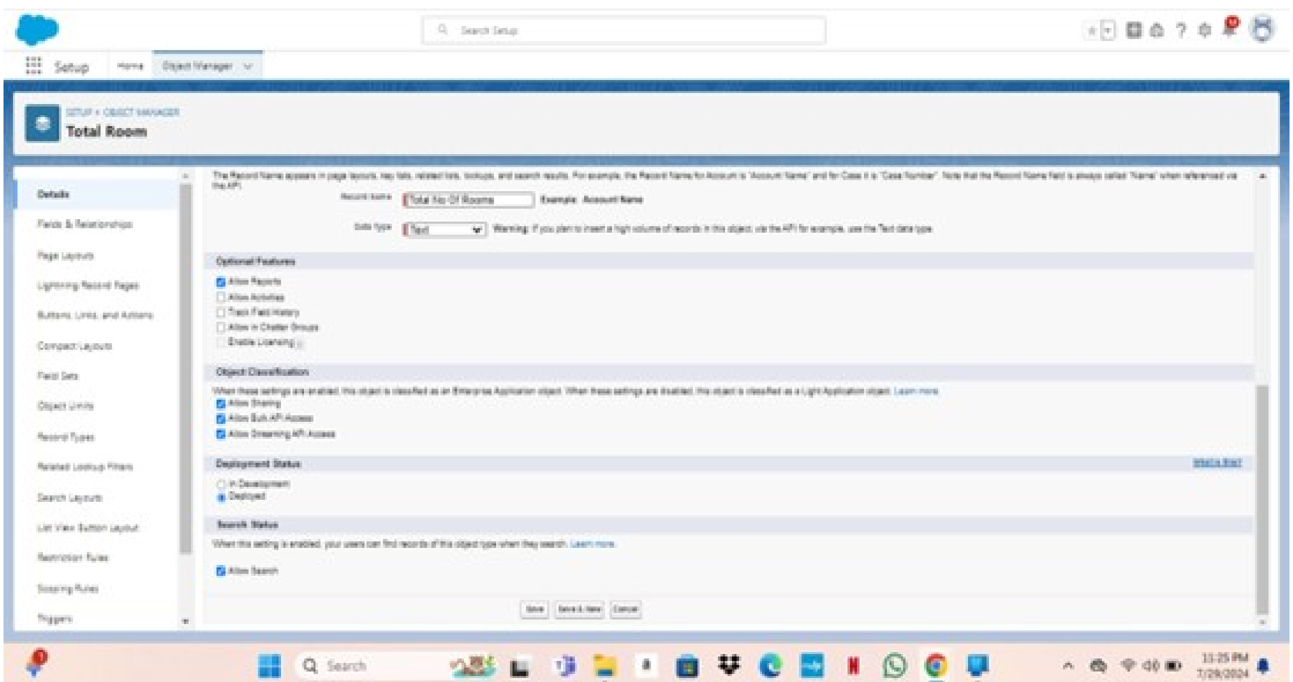
OBJECT :-

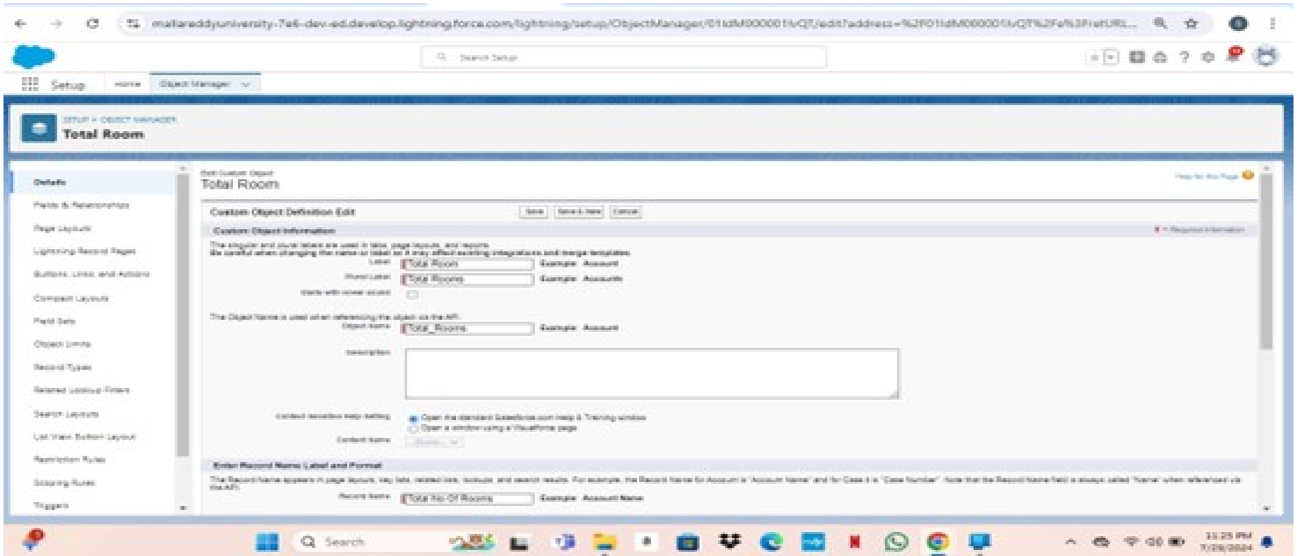
- Create a custom objectfor Total Rooms
- Create a custom object for Customer
- Create a custom object for Room Booking
- Create a custom object for Payment
- Create a custom objectfor Food Selection
- Create a custom object for Feedback

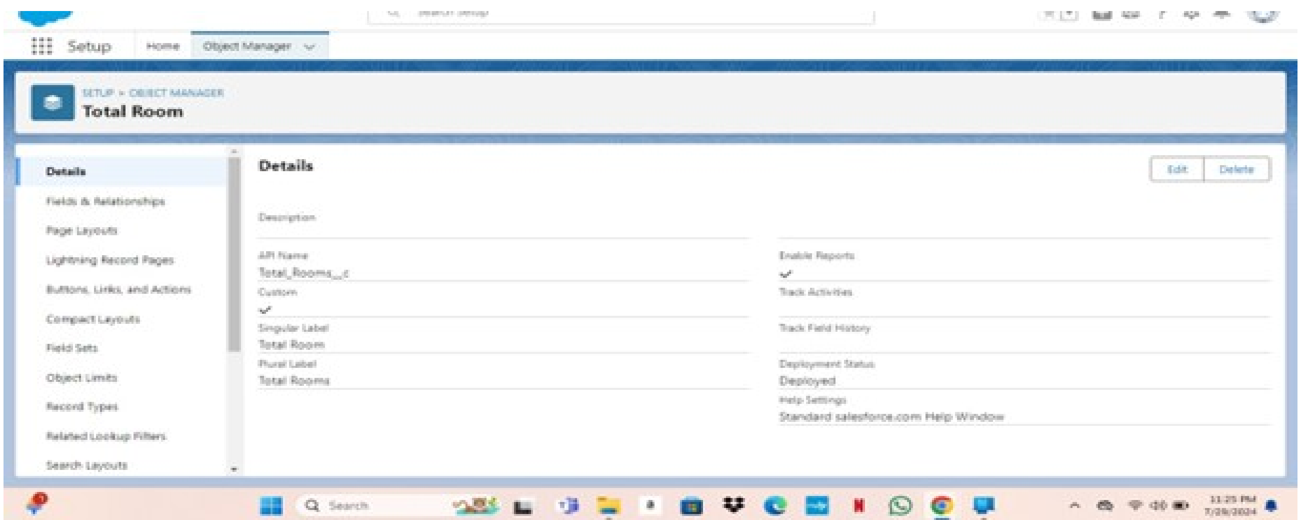
TASK 1 :- Create a custom object for Total Rooms

To create a custom object,follow these steps:

1. From setup click on object manager.
2. Clickcreate, select customobject.
3. Fillin the label as "Total Room ".
4. Fillin the plural label as " Total Rooms ".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. In the OptionalFeatures section, selectAllow Reports and Track FieldHistory.
8. In the DeploymentStatus section, ensure Deployed is selected.
9. In the SearchStatus section, selectAllow Search.
10. In the Object Creation Options section, select Add Notes and Attachmentsrelated list to default page layout.
11. Leaveeverything else as is, and click Save.





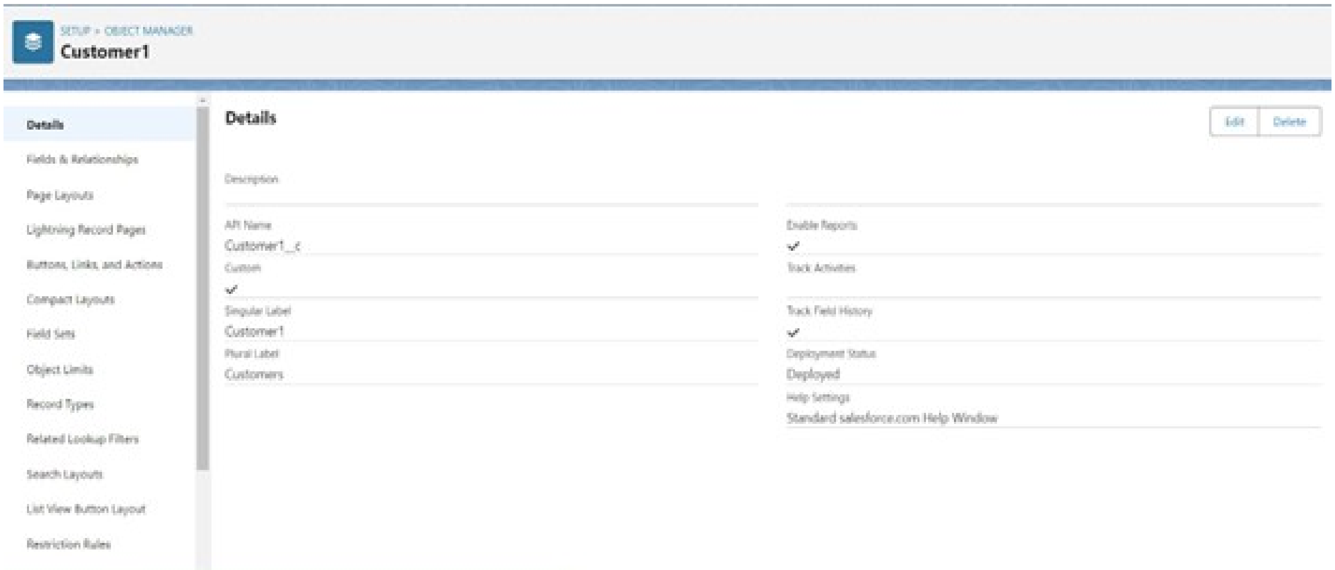


TASK 2 :- Create a custom object for Customer

To create a custom object,follow these steps:

1. From setup click on object manager.
2. Clickcreate, select customobject.
3. Fillin the label as "Customer1 ".
4. Fillin the plural label as " Customers ".
5. Record name: "Customer Name"
6. Select the data type as "Text".

7. In the OptionalFeatures section, selectAllow Reports and Track FieldHistory.
8. In the DeploymentStatus section, ensure Deployed is selected.
9. In the SearchStatus section, selectAllow Search.

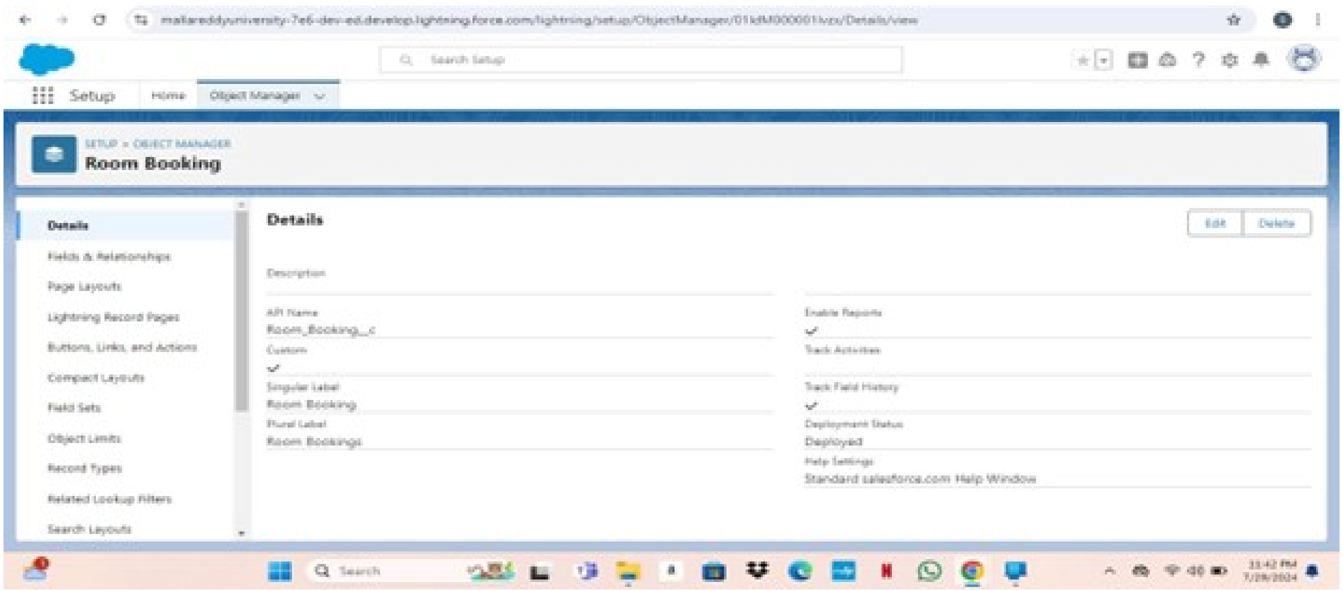


TASK 3 :- Create a custom object for Room Booking

To create a custom object,follow these steps:

1. From setup click on object manager.
2. Clickcreate, select customobject.
3. Fillin the label as " Room Booking".
4. Fillin the plural label as " Room Bookings ".
5. Record name: "Room No "
6. Select the data type as "Autonumber ".
7. UnderDisplay format enter RN-{000}
8. Enterstarting Number as 1
9. In the OptionalFeatures section, selectAllow Reports and Track FieldHistory.
10. In the DeploymentStatus section, ensure Deployed is selected.
11. In the SearchStatus section, selectAllow Search.

12. In the Object Creation Options section, select Add Notes and Attachmentsrelated list to default page layout.
13. Leaveeverything else as is, and click Save.

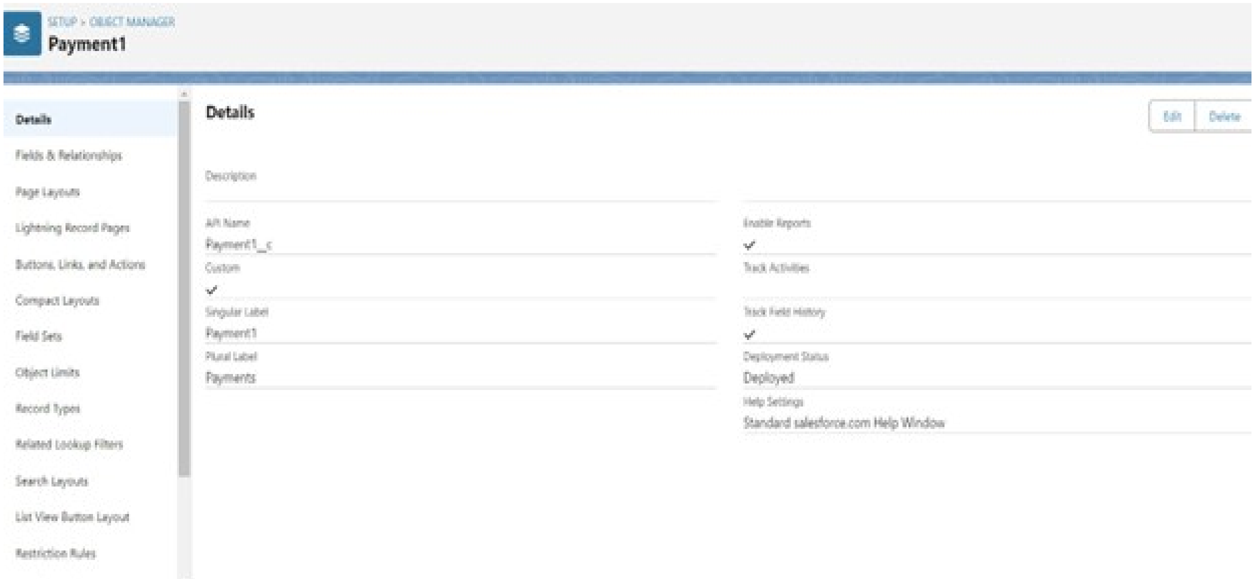


TASK 4 :- Create a custom object for Payment

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 labelas " Payment1".
4. Fill in the plural label as " Payments".
5. Record name:"Payment No "
6. Select the data type as "Autonumber ".
7. Under Display format enter PNO-{000}
8. Enter startingNumber as 1
9. In the Optional Featuressection, select Allow Reports and Track FieldHistory.
10. In the DeploymentStatus section, ensure Deployed is selected.
11. In the SearchStatus section, selectAllow Search.
12. In the Object Creation Options section, select Add Notes and Attachmentsrelatedlist to default page layout.

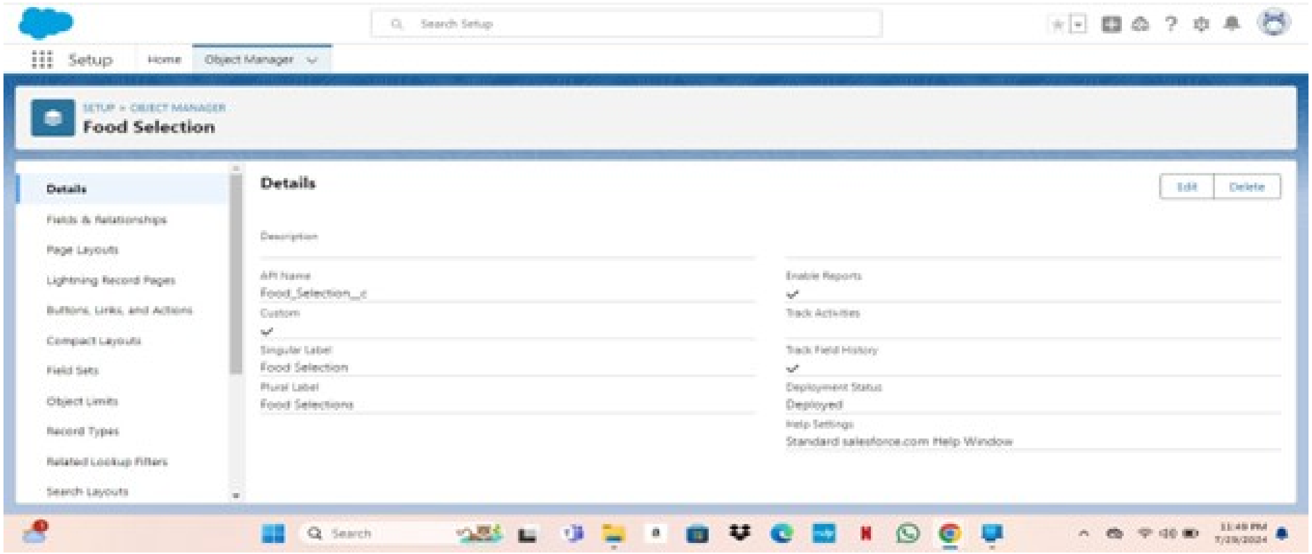
13. Leave everything else as is, and click Save



TASK 5 :- Create a custom object for Food Selection

To create a custom object,follow these steps:

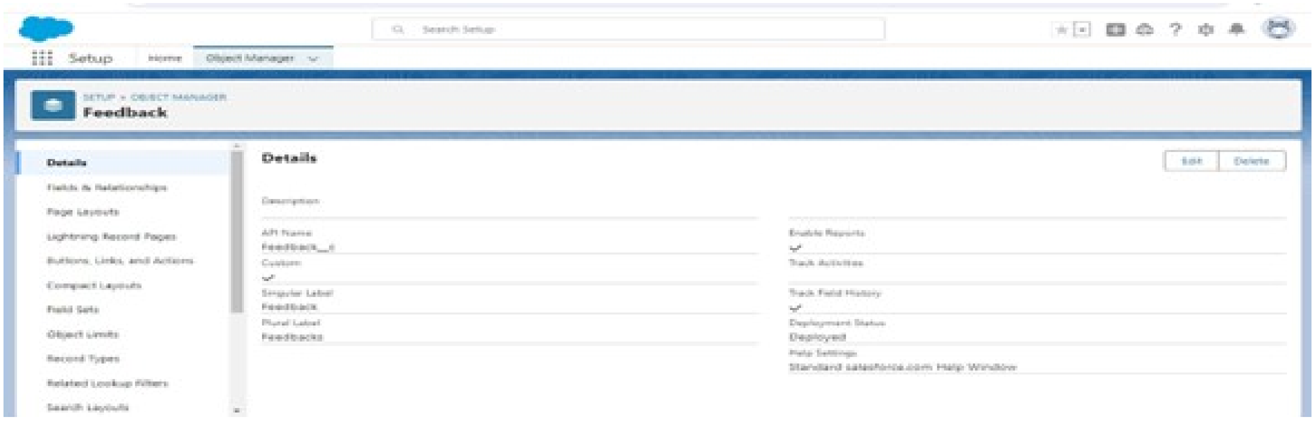
1. From setup click on object manager.
2. Clickcreate, select customobject.
3. Fillin the label as "Food Selection ".
4. Fillin the plural label as " Food Selections ".
5. Record name: " Food Selection No "
6. Select the data type as "Auto number ".
7. UnderDisplay format enter FS No-{000}
8. Enterstarting Number as 1
9. In the OptionalFeatures section, selectAllow Reports and Track FieldHistory.
10. In the DeploymentStatus section, ensure Deployed is selected.
11. In the SearchStatus section, selectAllow Search.
12. In the Object Creation Options section, select Add Notes and Attachmentsrelated list to default page layout.
13. Leaveeverything else as is, and click Save.



TASK 6 :- 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 "Autonumber ".
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.


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Details
Edit
Delete
Description
API Name
Feedback__c
Custom
Singular Label
Feedback
Plural Label
Feedbacks
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

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 tabssuch 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 quicklyaccess content and applications they frequently use withoutleavingthe salesforce.com application.

3. **Visualforce Tabs**

   Visualforce tabs are customtabs that display a visualforce page. Visualforcetabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. **Lightning ComponentTabs**

   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 appearsto the right of your currenttabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

TAB :-

- Creating a Tab for Total Rooms
- Creating a Tab for Customers
- Creating a Tab for Room Booking
- Creating a Tab for Remaining Objects

TASK 1 :- Creating a Tab for Total Rooms

1. Goto 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 asdefault & Save.

TASK 2 :- Creatinga Tab for Customers

To create a Tab:(Customers)

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

TASK 3 :- Creating a Tab for Room Booking

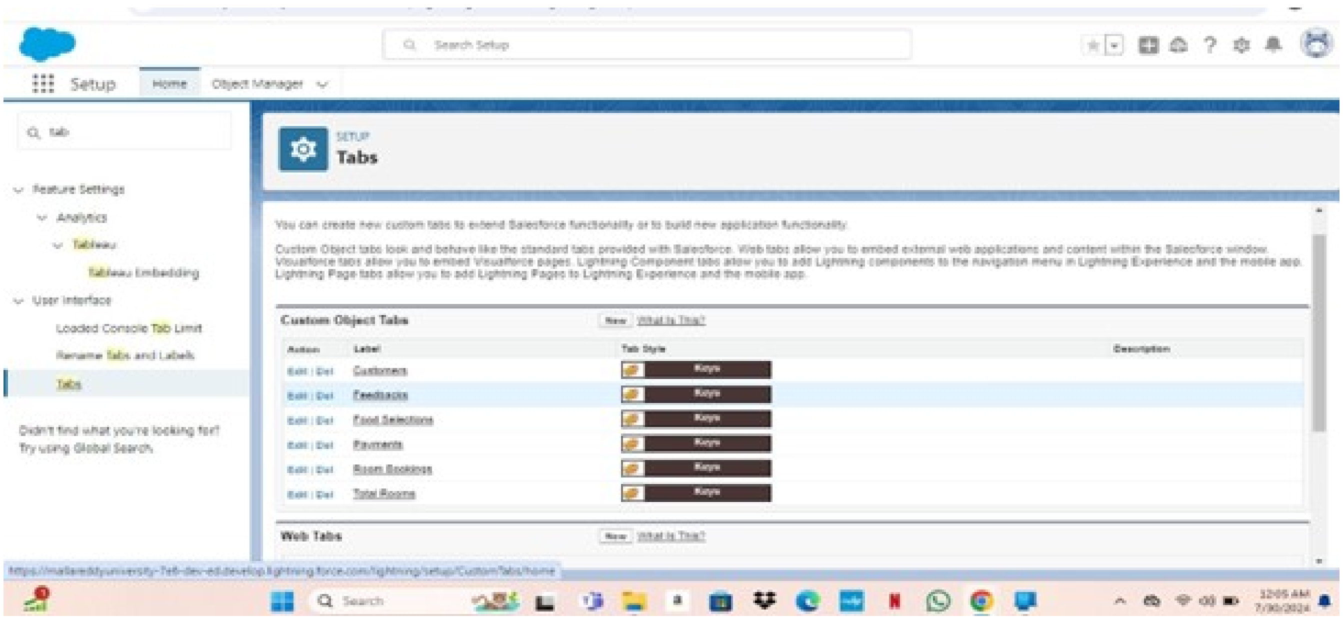
To create a Tab:(Room Bookings)

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

3. save.

TASK 4 :- Creatinga Tab for Remaining Objects

Now create the tabs for Payments, Food Selections, FeedbacksObjects.



4. Lightning App

INTRODUCTION :-

The Lightning App

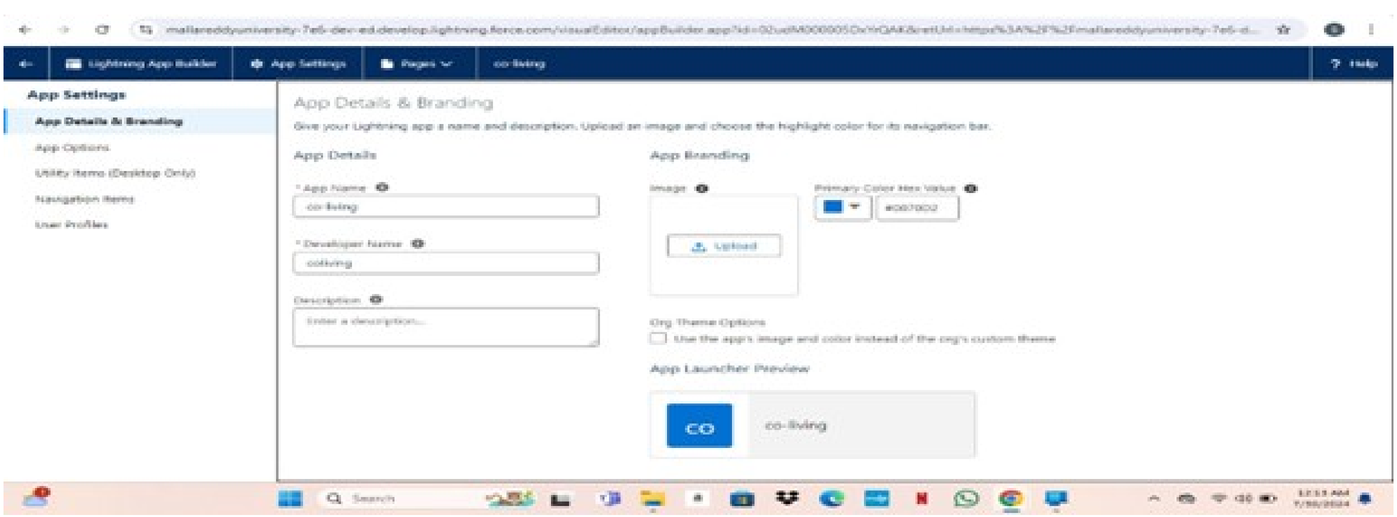
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your usersaccess to sets of objects,tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even includea utility bar and Lightning page tabs in your Lightning app.

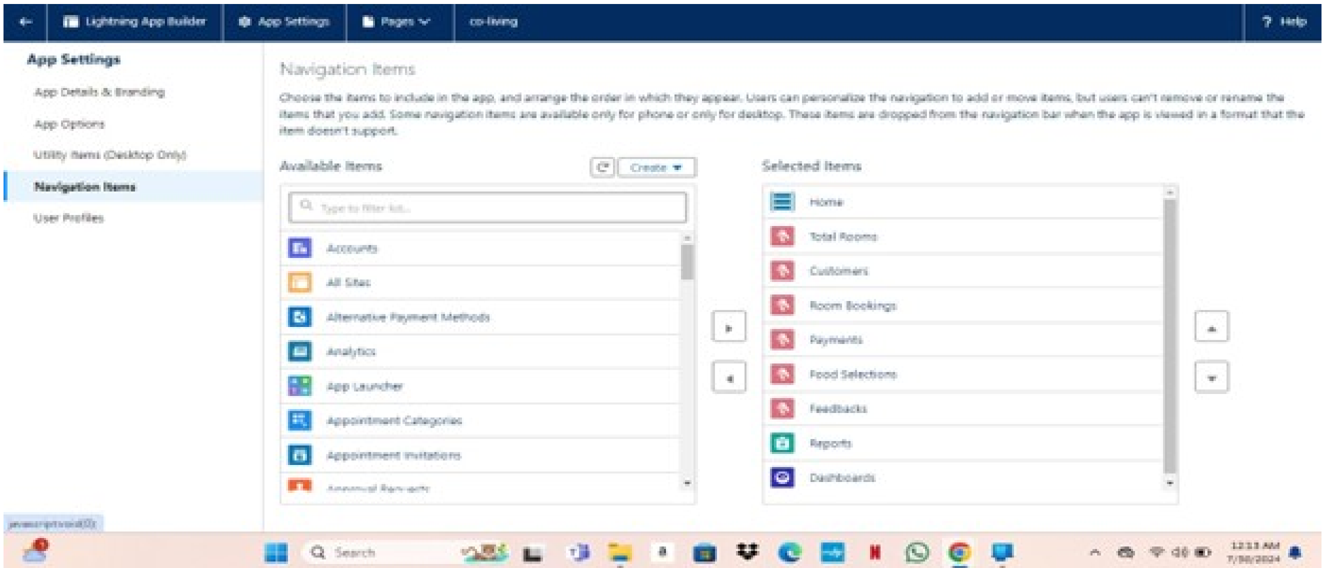
Members of your org can work more efficiently by easily switchingbetween apps.

TASK 1:- Creating Lightning App

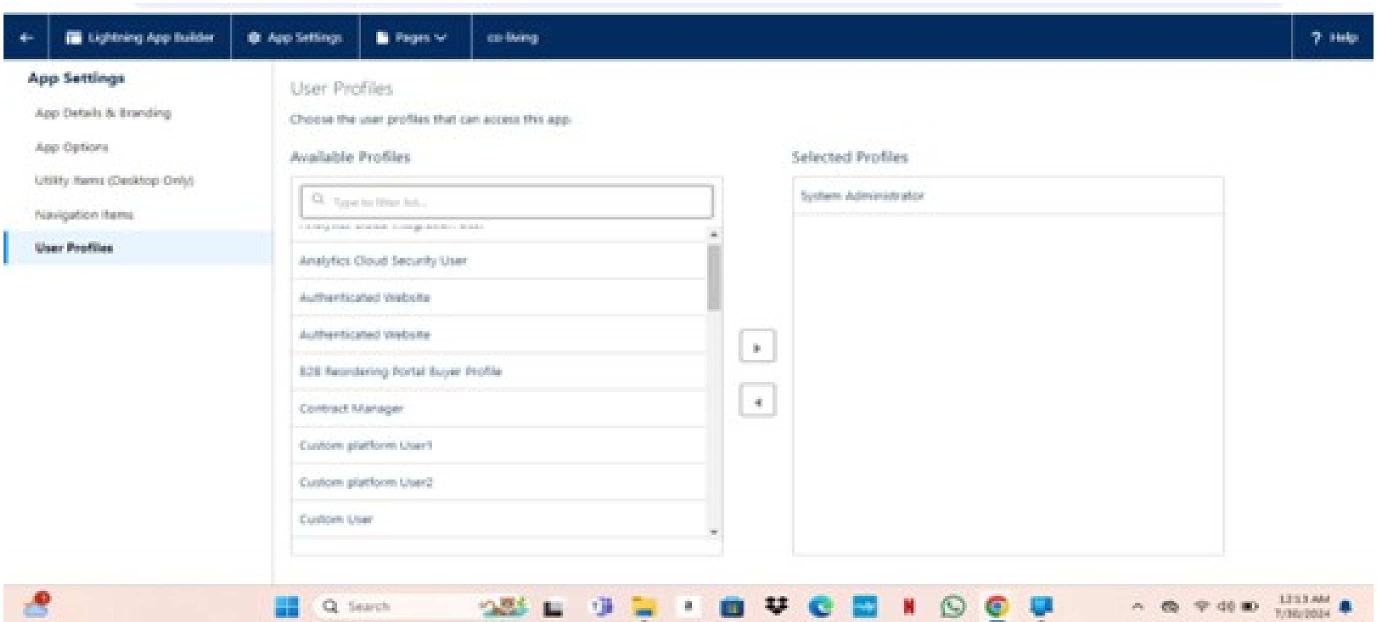
1. Go to setup page > search “app manager” in quick find > select“app manager” > click on New lightningApp.
2. Fill the app name in app detailsand branding > Next > (App option page) keep it as default > Next > (Utility Items)keep it as default > Next.



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.



1. To Add User Profiles: Search profiles (Systemadministrator) in the search bar > click on the arrowbutton> save &finish.



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 ofthe records become simpler and quicker.

Types of Fields

a. Standard Fields
b. 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 standardfield. 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 inevery Salesforce application. They are,

1. Created By
2. Owner
3. LastModified
4. FieldMade During object Creation

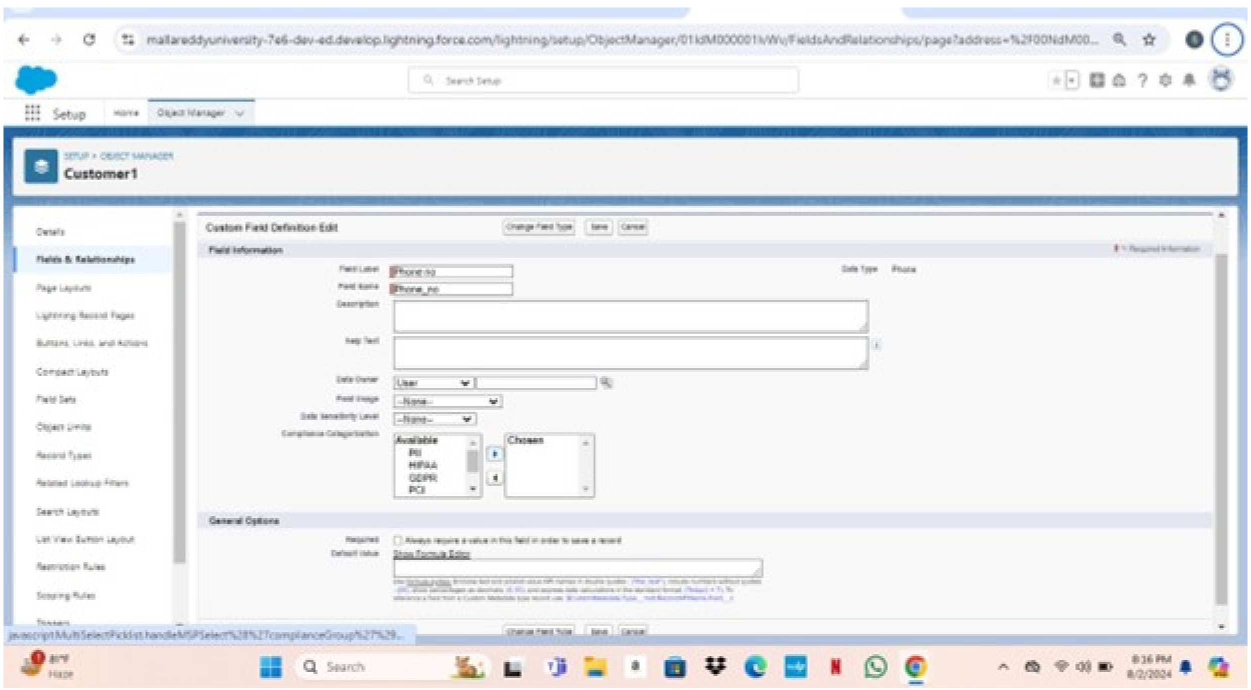
Custom Fields:

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 includethem in the records, unlike Standardfields. Hence, the final decisiondepends on the user,andhe can add/remove Custom Fieldsof any given form.

TASK 1 :- Creation of fields for the customer1object

To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) insearch bar > clickon the object.
2. Nowclick on “Fields& Relationships” > New
3. Select Data Type as a “Phone”
4. Clickon next
5. Fillthe Above as following:
   i. FieldLabel: Phone no
   ii. Field Name : gets auto generated
   iii. Click on Next > Next > Save and new**.**



To create another fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) insearch bar > clickon the object.
2. Now click on “Fields& Relationships” > New

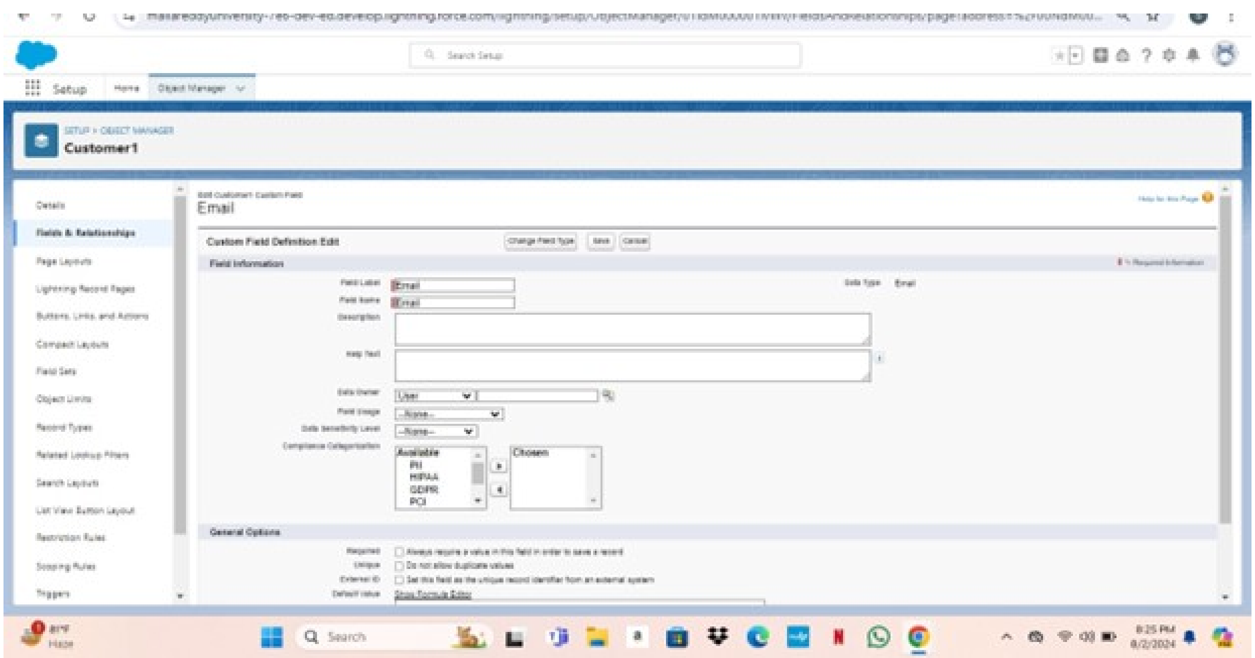
3. Select Data type as a “Email”and Click on Next

4. Fill the Above as following:

    a. FieldLabel: Email

    b. FieldName :It’s gets auto generated

    c. Clickon Next > Next > Save and new.

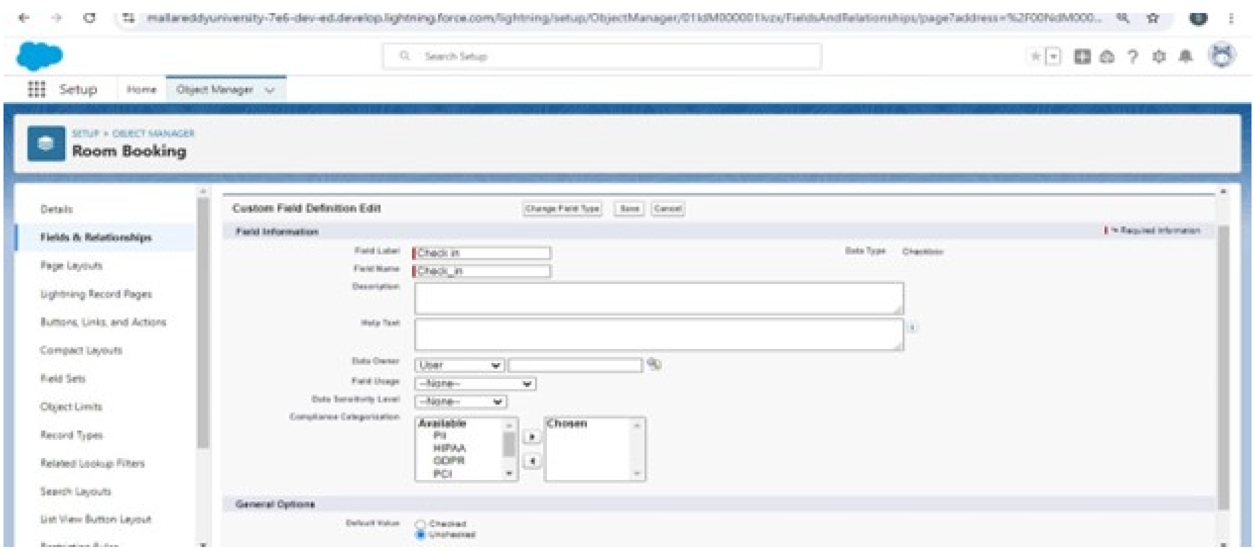


4. To create another fields in an object:

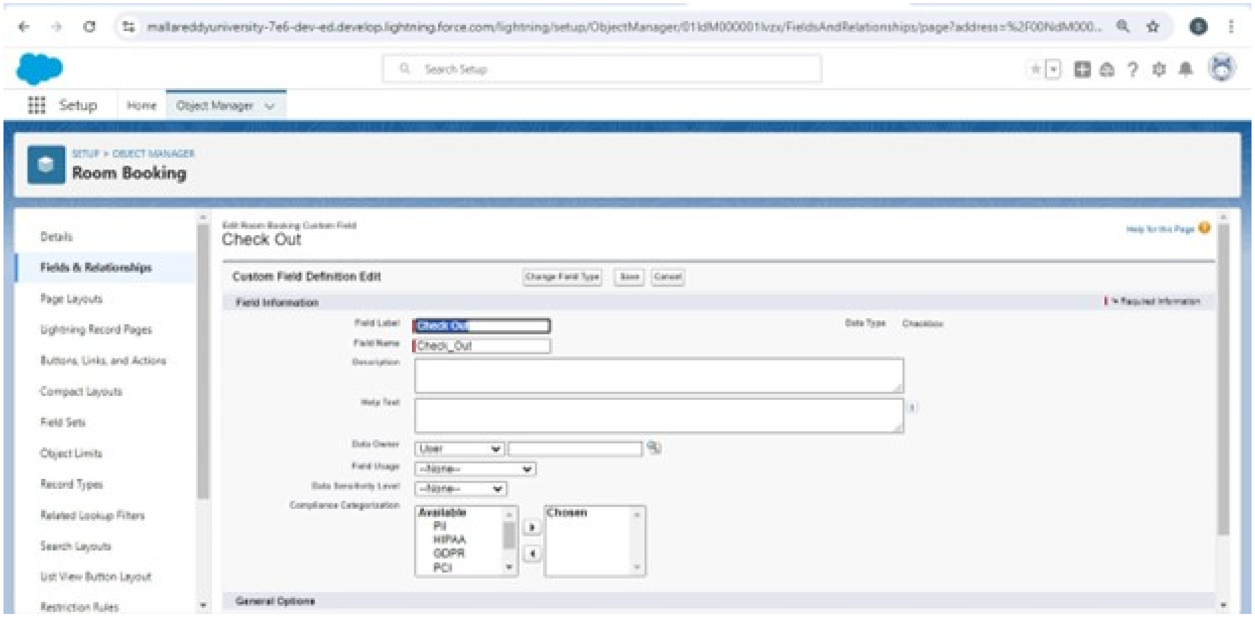
- Go to setup > click on Object Manager > type object name(Customer1) in search bar > clickon the object.
- Now click on “Fields& Relationships” > New
- Select Data type as a “Picklist” and Click on Next
- Fill the Above as following:
- FieldLabel: Current Status
- Value- Select enter values with each value separated by a new line

    1. Student
    2. Employee
    3. Others

- Select required
- FieldName gets auto generated
- Clickon Next > Next > Save and new.

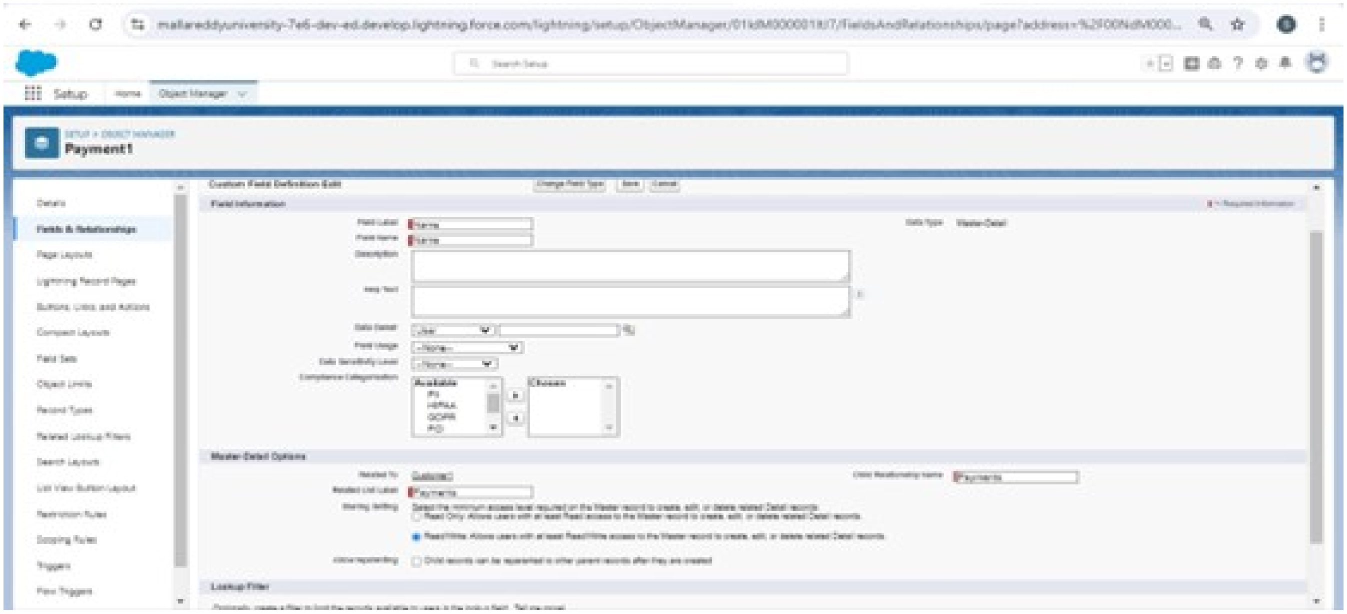


1. Tocreate fields in an object:
    a. Go to setup > click on Object Manager > type object name(Room Booking)in the searchbar > click on the object.
    b. Now click on "Fields & Relationships" ? New
    c. Select Data Type as a "Checkbox"
    d. Click on Next
    e. Fill the Above as following:
        i. FieldLabel: Check Out
        ii. FieldName :It's gets auto generate
        iii. Clickon Next > Next > Save and new

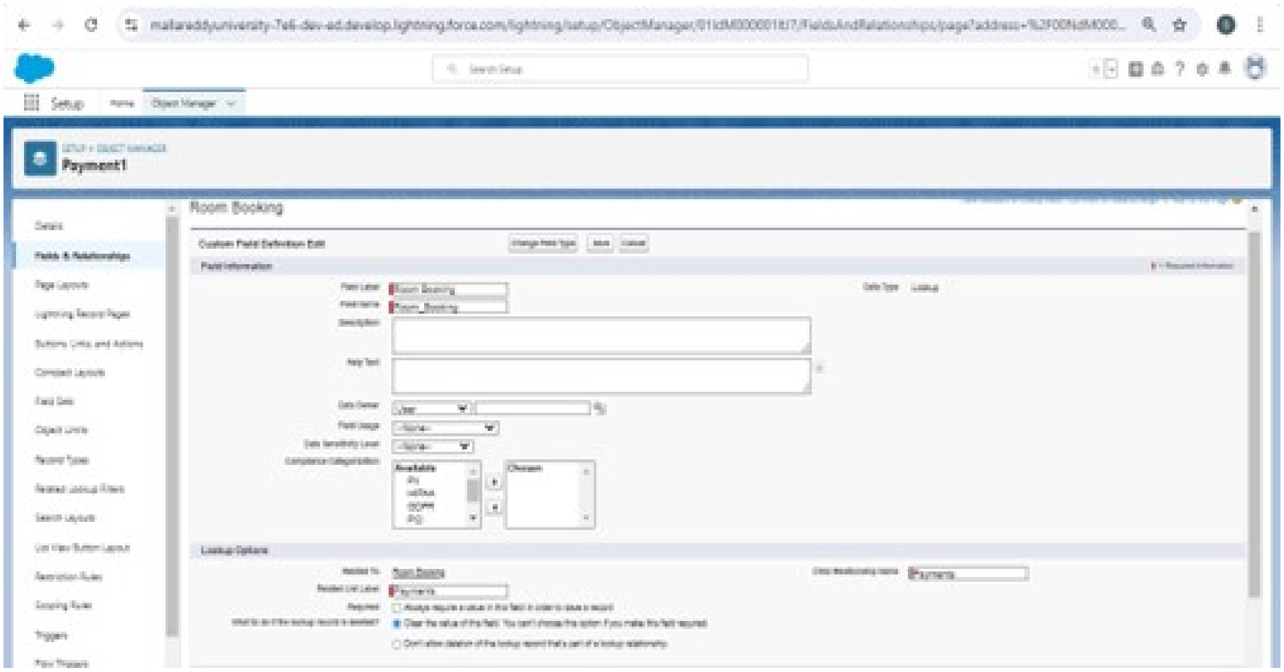


TASK 3 :- Creation of fields & Relationship of Payment1Object.

1. **To create fields & relationship to an object:**
   a. Go to setup> click on Object Manager> type objectname(Payment1) in thesearch bar > click on the object.
   b. Now click on “Fields& Relationships” > New
   c. Select Data Type as a “Master-detail Relationship”
   d. Click on Next
   e. Click on the Related to drop down and Selectthe Customer1 objectand click onNext
   f. Fill the Above as following:
      i. Change the FieldLabel: Name
      ii. Field Name :It’sgets auto generated
      iii. Click on Next > Next > Save and new.



1. **To createanother fields &relationship to an object:**
    a. Go to setup> click on Object Manager> type objectname(Payment1) in thesearch bar > click on the object.
    b. Now click on “Fields& Relationships” > New
    c. Select Data Type as a “Lookup Relationship”
    d. Click on Next
    e. Click on the Related to drop down and Selectthe Room Bookingobject andclickon Next
    f. Fill the Above as following:
        i. Change the FieldLabel: Room Booking
        ii. Field Name :It’sgets auto generated
        iii. Clickon Next > Next > Save and new.



2. Creation of another fields for the Payment1 object to create fieldsin an object:

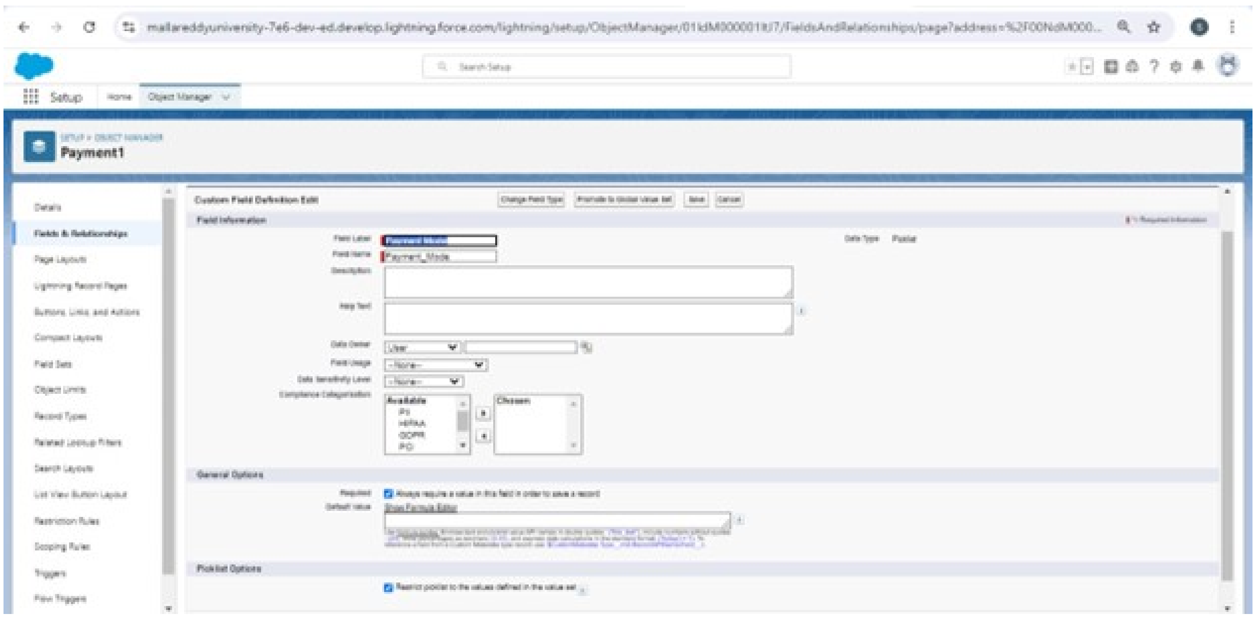
- Go to setup > click on Object Manager > type object name(Payment1) inthe searchbar > click on the object.
- Now clickon “Fields &Relationships” > New
- Select Data Type as a “Picklist”
- Fill the Above as following:

    1. FieldLabel: Payment Mode
    2. Value- Select enter values with each value separated by a new line
        i. Cash
        ii. Check
        iii. Credit card
        iv. Debit card
        v. UPI
        vi. Phonepe

vii. Gpay

viii. Paytm

- Select required
- Clickon Next > Next > Save and new.



Cross Object FormulaField:

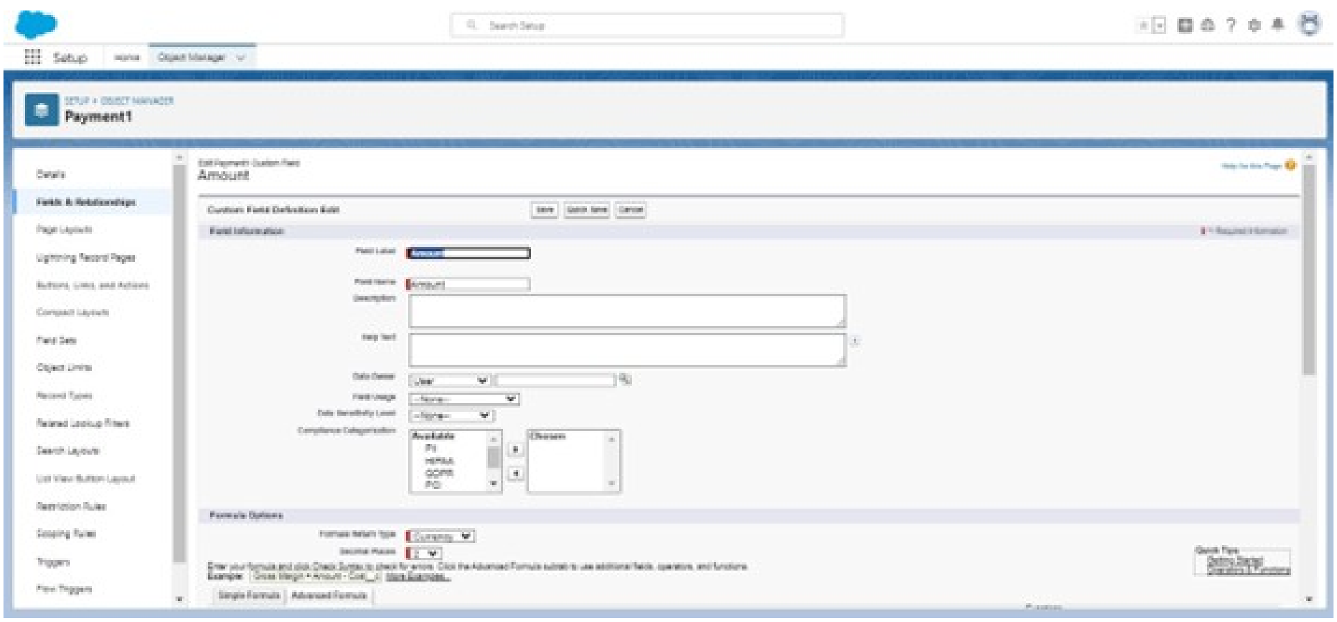
In Salesforce, a cross-object formula field allows you to create a formula that references fields from relatedobjects. It enablesyou to perform calculations or display data from relatedrecords without the need for custom code or complexworkflows.

Why do we need tocreate the Cross Object Formula Field:

If we want to get the Particular field from anotherobject in that case we will usethe 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.

1. Create a Cross object formula Field in Payment1Object:
   a. Go to setup > click on Object Manager > type object name(Payment1) inthe searchbar > click on the object.

b. Now clickon “Fields &Relationships” > New
c. Select Data Type as a “Formula”
d. Click on Next
e. Enter the Field label: Amount and Field name: gets auto generatedandclick on Next
f. In the Advanced Formula Click on the Insert field in the popup ScreenSelect the Payment1 and in the second drop down select the Room booking and in the three drop down select the Amount field and click onInsert“ Room_Booking_r.Amount_c ”.
g. Click on the Checksyntax: No syntaxerrors in mergefields
h. Click on Next > Next > Save and new.



TASK 4 :- Creation of fields for Food SelectionObject.

1. To create fields & relationship to an object:

a. Go to setup > click on Object Manager > type object name(Room booking) in the searchbar > click on the object.
b. Now clickon “Fields &Relationships” > New
c. Select Data Type as a “Master-detail Relationship”

d. Click on Next

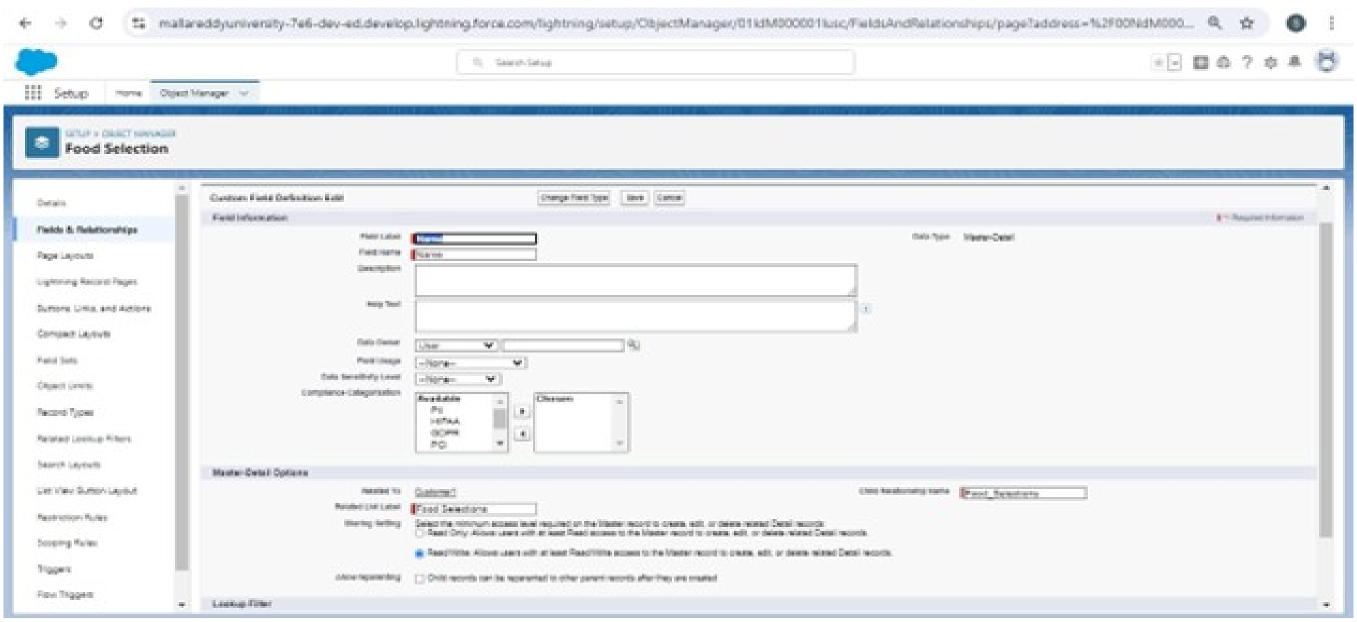
e. Click on the Related to drop down and Select the Customer1 objectand clickon Next

f. Fill the Above as following:

   i. Change the Field Label: Name

   ii. FieldName :It’s gets auto generated

   iii. Clickon Next > Next > Save and new.



Picklist value sets:

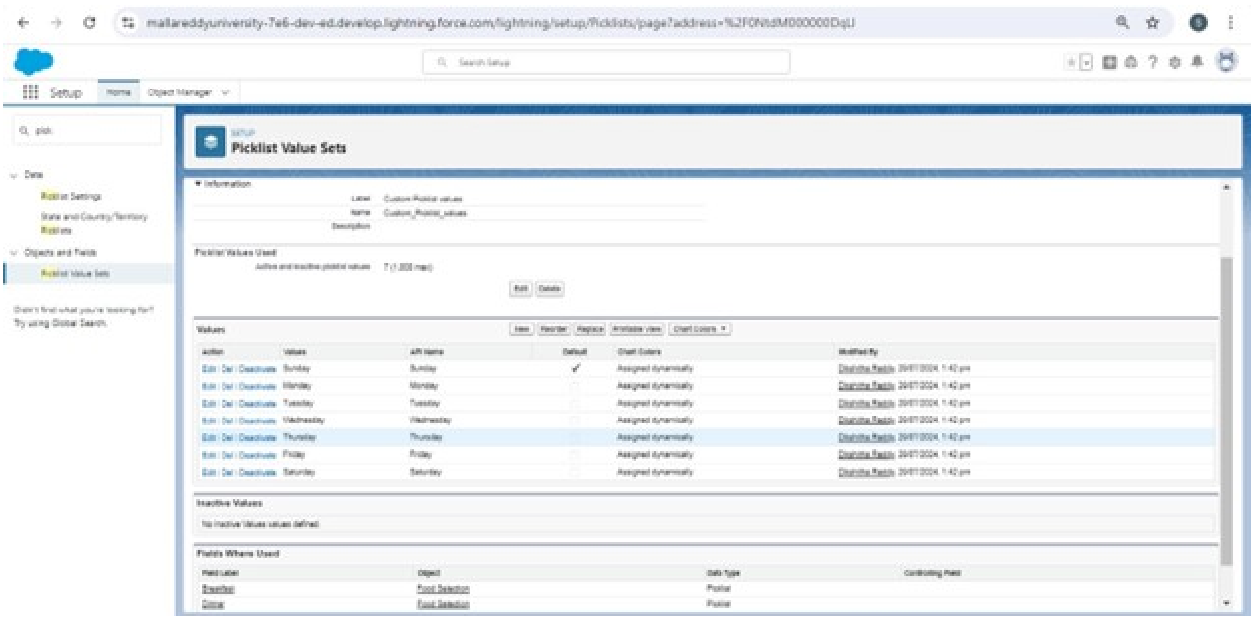
Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restrictedso users can’tadd unapproved valuesthrough the API.

Create a picklistvalue set:

1. First click on gear icon and click on setup
2. Click on home tab in the Quick find box search for the “ Picklistvalue sets ”
3. Click on the Picklistvalue 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
    a. Sunday
    b. Monday
    c. Tuesday
    d. Wednesday
    e. Thursday
    f. Friday
    g. Saturday

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



2. Create a picklist field for Food selection object:

To create fields in an object:

a. Go to setup > click on Object Manager > type object name(Food Selection)in the searchbar > click on the object.
b. Now clickon “Fields &Relationships” > New
c. Select Data Type as a “Picklist”
d. Fill the Above as following:

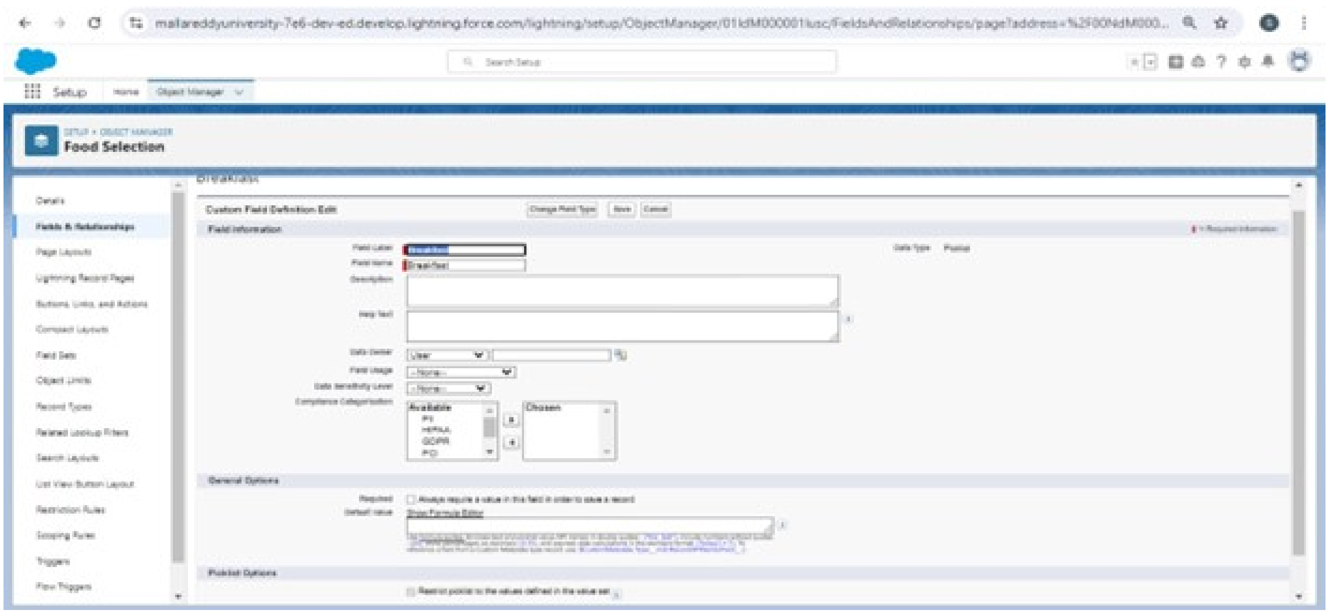
i. FieldLabel: Breakfast

ii. UnderValue - Select the Use global picklistvalue set

iii. Under the drop down select the Custom Picklist Values

iv. Select required

v. Clickon Next > Next > Save and new.



1. **Create a another picklist Field for Food selection object:**

   To create fields in an object :

   1. Go to setup > click on Object Manager > type object name(Food Selection)in the search bar > click on the object.
   2. Now click on "Fields &Relationships" > New
   3. Select Data Type as a "Picklist"
   4. a. Fill the Aboveas following:
      - FieldLabel: Select Breakfast
      - UnderValue - Enter values, with each value separated by a new line

        i. Idli

ii. Bonda

iii. Dosa

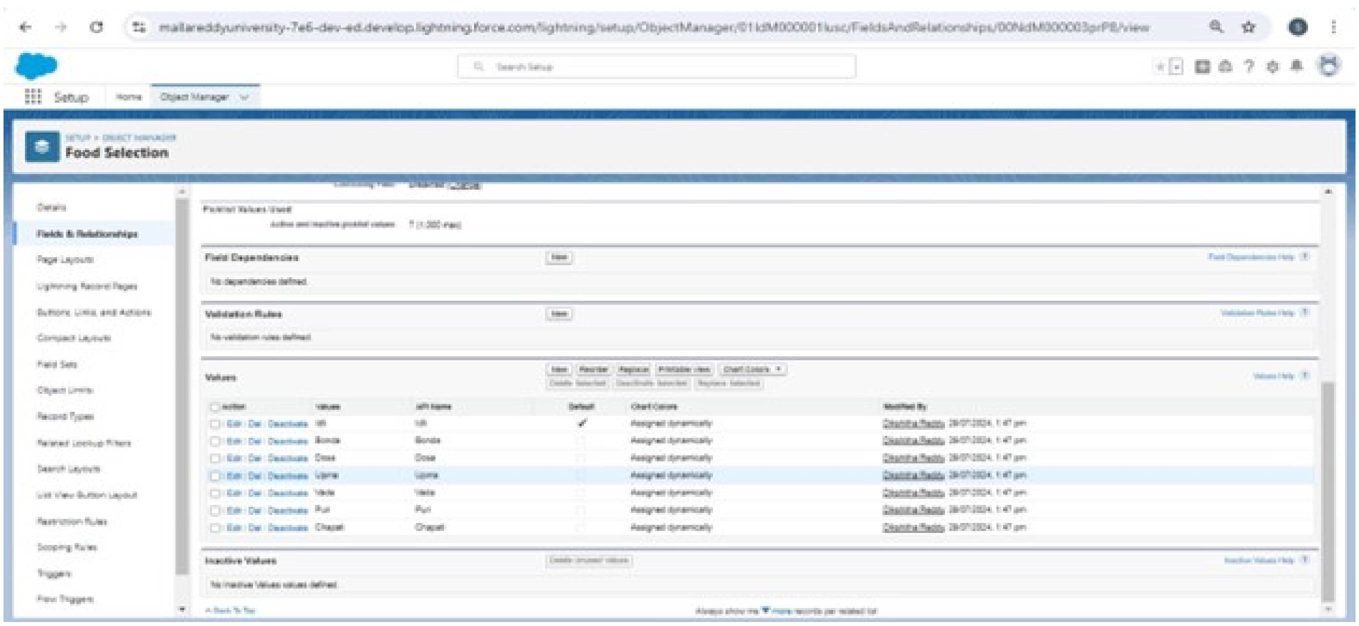
iv. Upma

v. Vada

vi. Puri

vii. Chapati

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



Field Dependency:

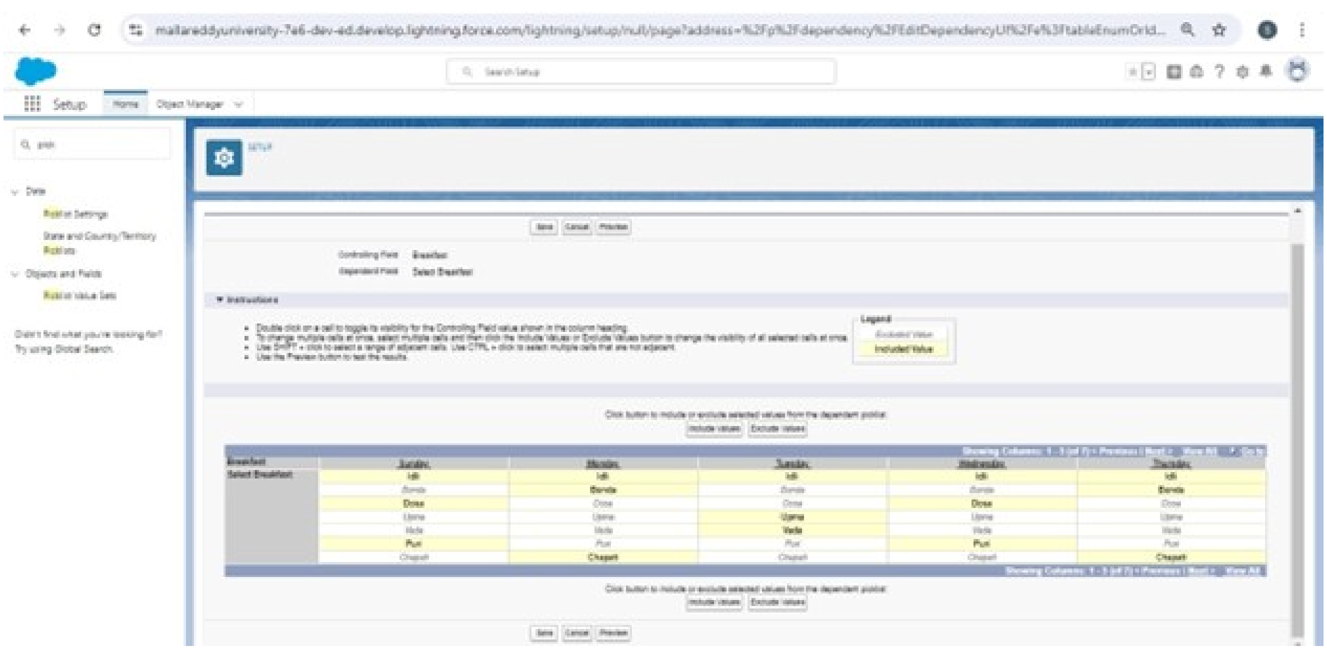
A field dependency refers to a relationship between two fields on an object where the values of one field determinethe available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available optionsin a dependent picklist are determined by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

Need to use Field Dependency:

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

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

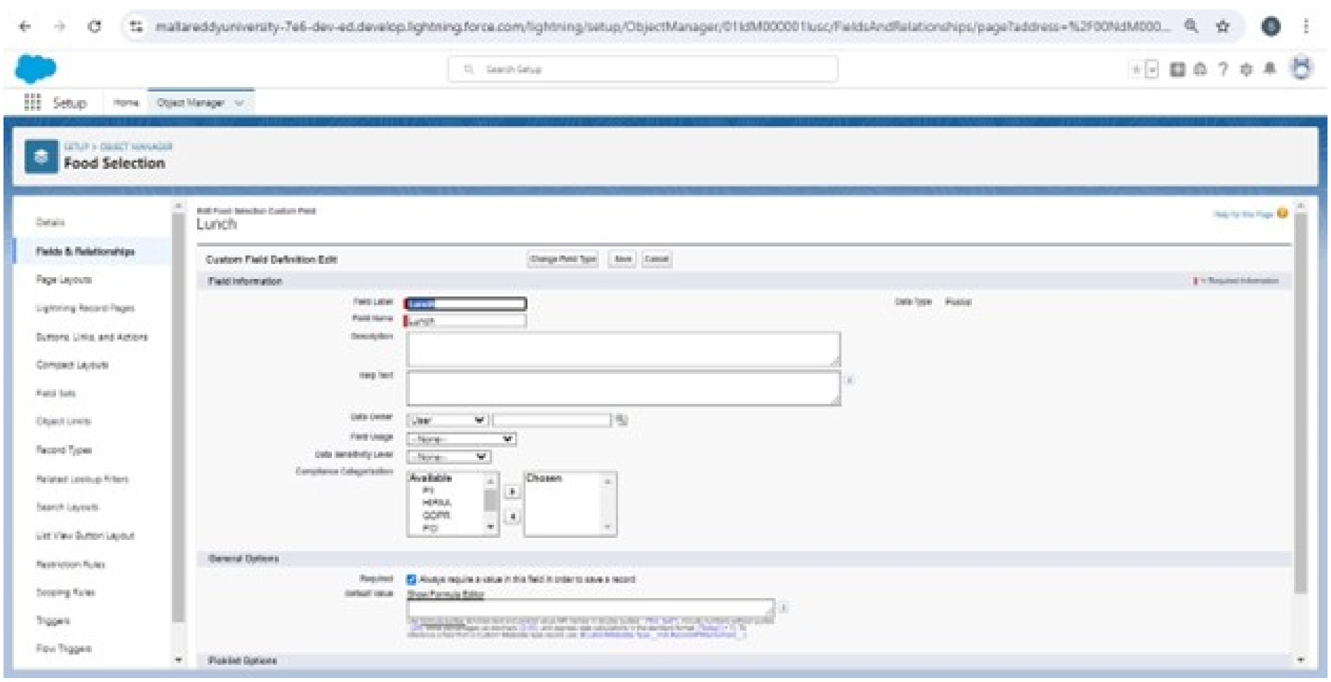
1. Go to setup > click on Object Manager > type object name(Food Selection)in the searchbar > click on the object.
2. Now Click on fields & relationships and Click on Field Dependencies
3. Now Click on New Option
4. Under Controlling Field: Breakfast, Dependent Field: Select Breakfast and Click on Continue.
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 clicl on save.



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 clickon “Fields &Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
    - Field Label: Lunch
    - UnderValue - Select the Use global picklistvalue set
    - Under the drop down select the Custom Picklist Values
    - Select required
    - Clickon Next > Next > Save and new.

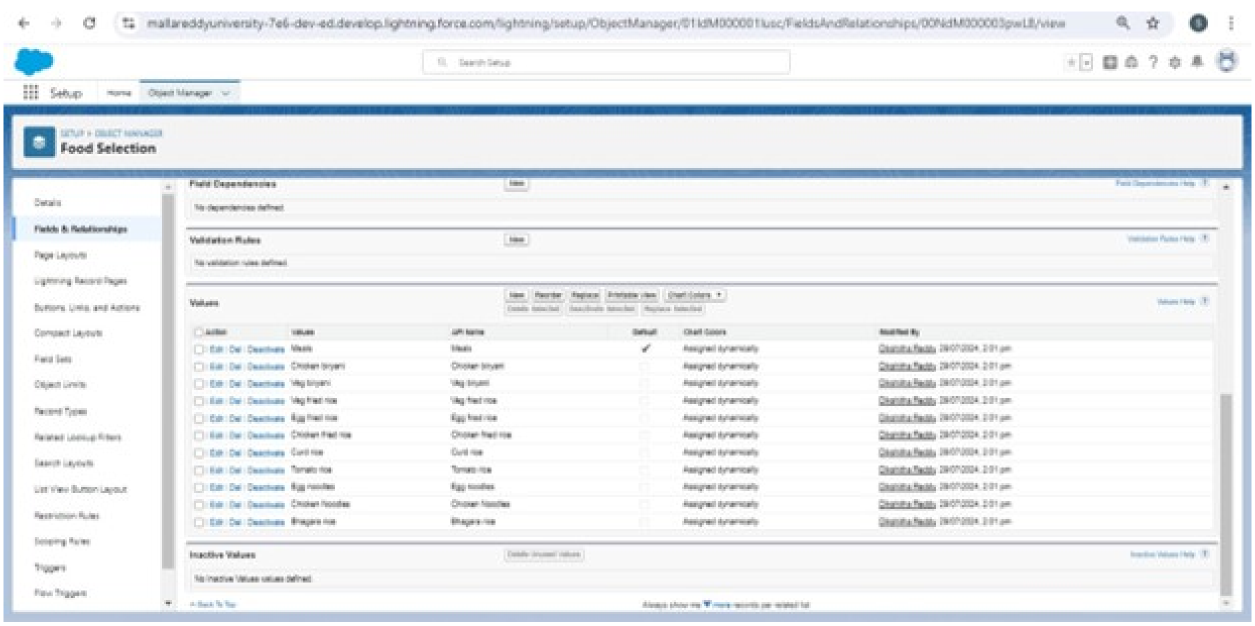


5. To createfields in an object:
    a. Go to setup > click on Object Manager > type object name(Food Selection)in the searchbar > click on the object.
    b. Now clickon “Fields &Relationships” > New
    c. Select Data Type as a “Picklist”
    d. Fill the Above as following:
        i. Field Label: Select Lunch
        ii. UnderValue - 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

iii. Select Checkbox Use First value as default Value

iv. Clickon Next > Next > Save and new.



To create a Field dependencies for Dinner and Select Dinner.

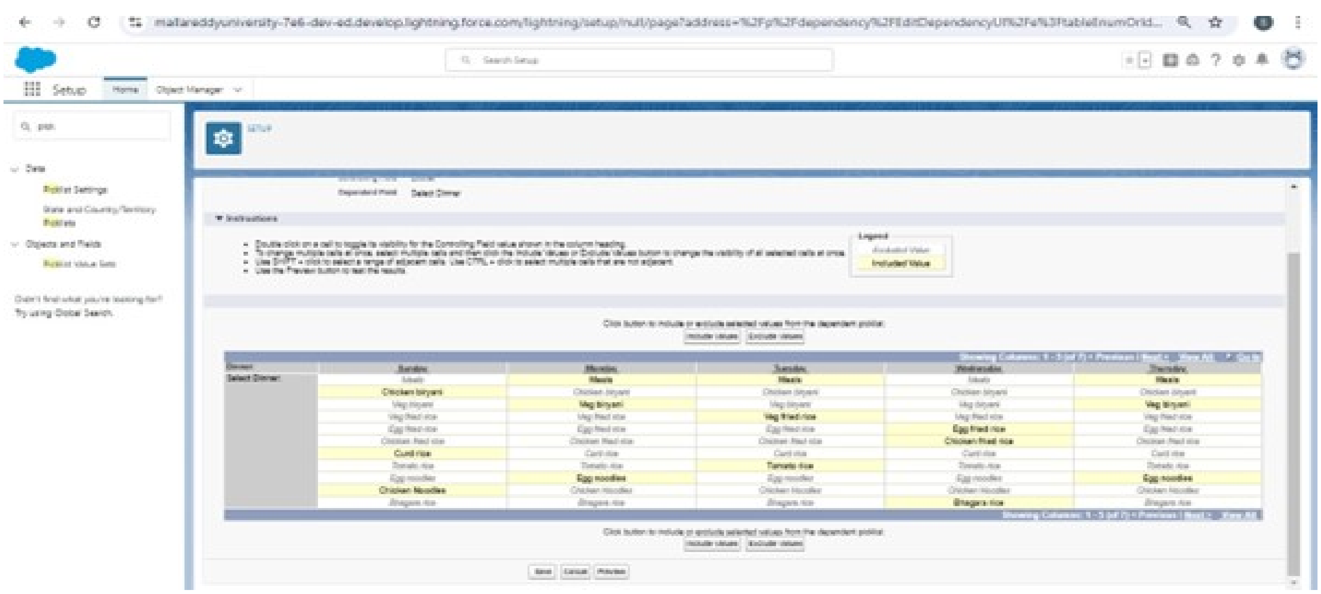
i. Go to setup > click on Object Manager > type object name(FoodSelection) in the search bar > click on the object.

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

iii. Now Click on New Option

iv. Under Controlling Field: Dinner, Dependent Field: Select Dinner and Click on Continue

v. Under the Sunday Ctrl and select the Picklist values Chicken biryani, curd rice, Chickennoodles and Click on IncludeValues in such a way that do for the remaining days and clickon save.



TASK 5 :- Creation of fields for Feedback Object.

create fields & relationship to an object:

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > clickon the object.
2. Now click on “Fields& Relationships” > New
3. Select Data Type as a “LookupRelationship”
4. Click on Next
5. Click on the Related to drop down and Select the Customer1 object andclick on Next
6. Fill the Above as following:
   a. Change the Field Label: Name
   b. FieldName :It’s gets auto generated
   c. Clickon Next > Next > Save and new.

1. To create Anotherfields in an Same object:
    a. Go to setup > click on Object Manager > type object name(Feedback) insearch bar > clickon the object.
    b. Now clickon “Fields &Relationships” > New
    c. Select Data Type as a “Picklist”

    d. Click on Next
    e. Fill the Above as following:
        i. FieldLabel: Roomcleaning
        ii. FieldName :It’s gets auto generated
        iii. Under Values select Enter values, with each value separatedby anew line
            a. Good
            b. Satisfaction
            c. Bad
    a. Clickon Next > Next > Save and new.

1. Tocreate a AnotherFields in an Same Object
    a. Go to setup > click on Object Manager > type object name(Feedback) insearch bar > clickon the object.
    b. Now click on “Fields & Relationships” ? New
    c. Select Data Type as a “Picklist”
    d. Click on Next
    e. Fill the Above as following:
        i. FieldLabel: Internet
        ii. FieldName :It’s gets auto generated
        iii. Under Values select Enter values, with each value separatedby anew line
            a. Good
            b. Satisfaction
            c. Bad
    a. Clickon Next > Next > Save and new.

2. To createa Another Fieldsin an Same Object
1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > clickon 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:
    a. Field Label: Food
    b. FieldName :It’s gets auto generated
    c. Under Values select Enter values, with each value separatedby a new line
        1. Good
        2. Satisfaction
        3. Bad
    a. Clickon Next > Next > Save and new.
1. Tocreate a AnotherFields in an Same Object
    a. Go to setup > click on Object Manager > type object name(Feedback) insearch bar > clickon the object.
    b. Now clickon “Fields &Relationships” > New
    c. Select Data Type as a “Text area”
    d. Click on Next
    e. Fill the Above as following:
        i. Field Label: Suggestion
        ii. FieldName :It’s gets auto generated
        iii. Clickon Next > Next > Save and new.

TASK 6 :- Creation of fields for The Total Rooms Object.

1. Tocreate fields in an object:
    a. Go to setup > click on Object Manager > type object name(Total Rooms) insearchbar > clickon the object.
    b. Now clickon “Fields &Relationships” > New

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

d. Fill the Above as following:

e. Field Label:Rooms Available

f. Field Name : It’s gets auto generated

g. Select the Formula Return Type as “Number”

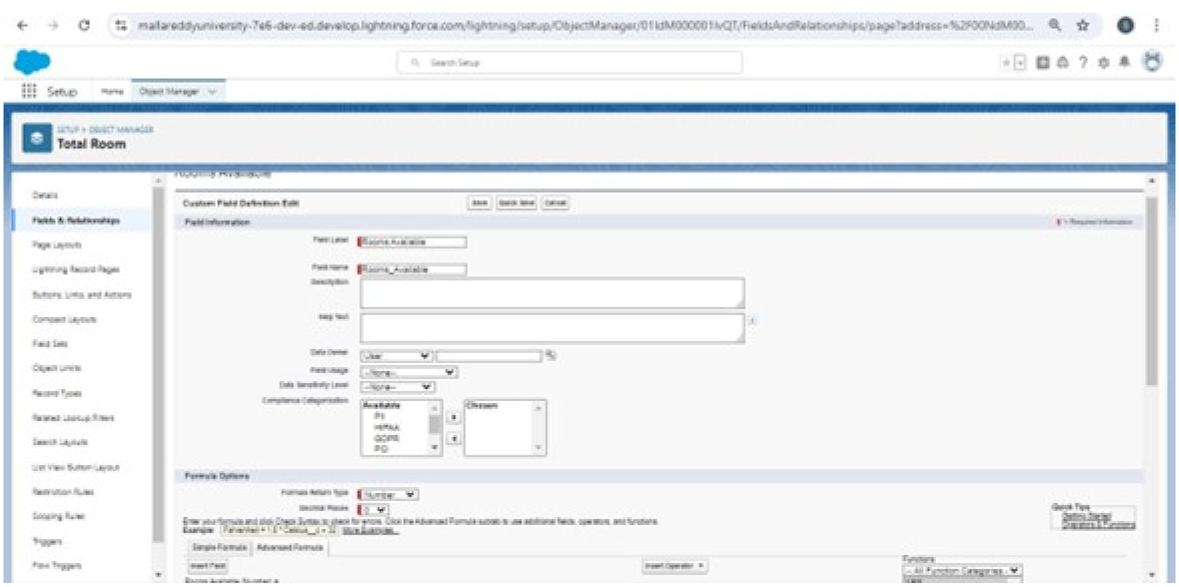
h. Select the Decimal placesas “0” and Click on Next

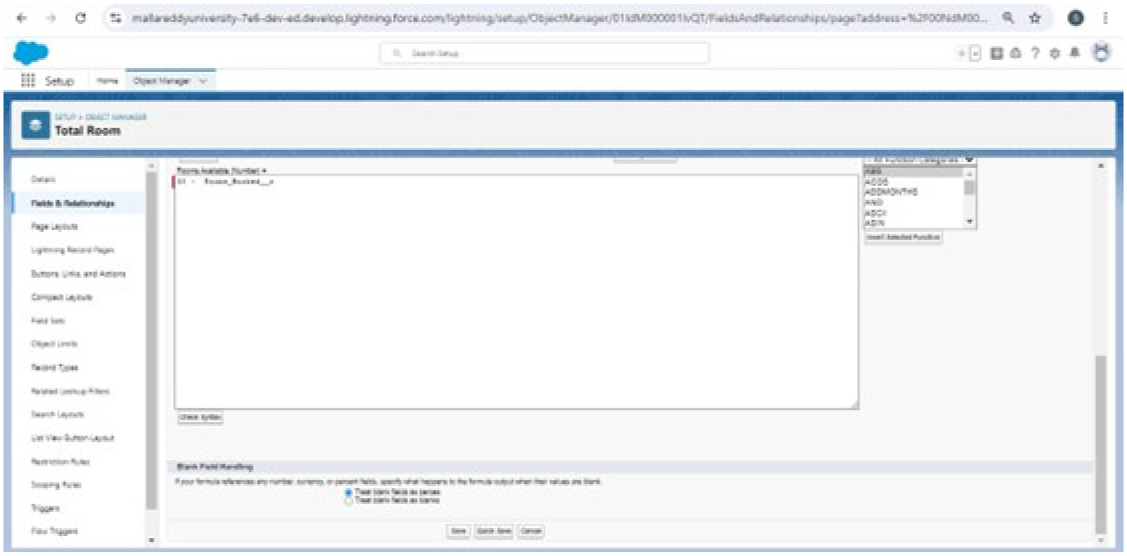
Note: I am Considering “TotalNo Of Rooms = 30” While creatinga new record in

Total Rooms Object.

i. Click on the AdvancedFormula “ 30 - Rooms_Booked_c ” and CheckSyntax

j. Clickon Next > Next > Save and new.





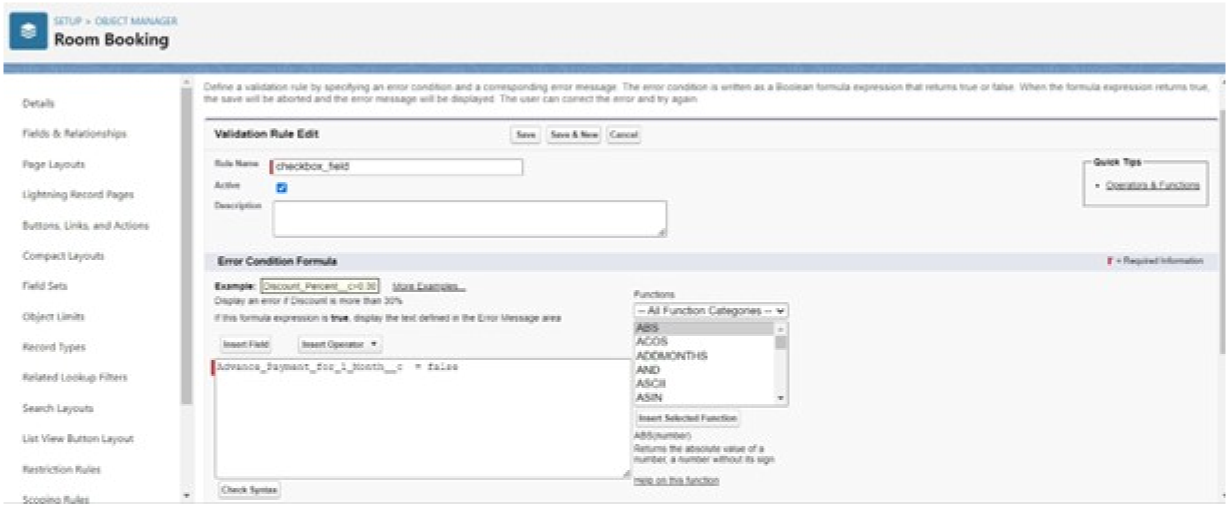
6. Validation rule

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 therecord until the issues are resolved.

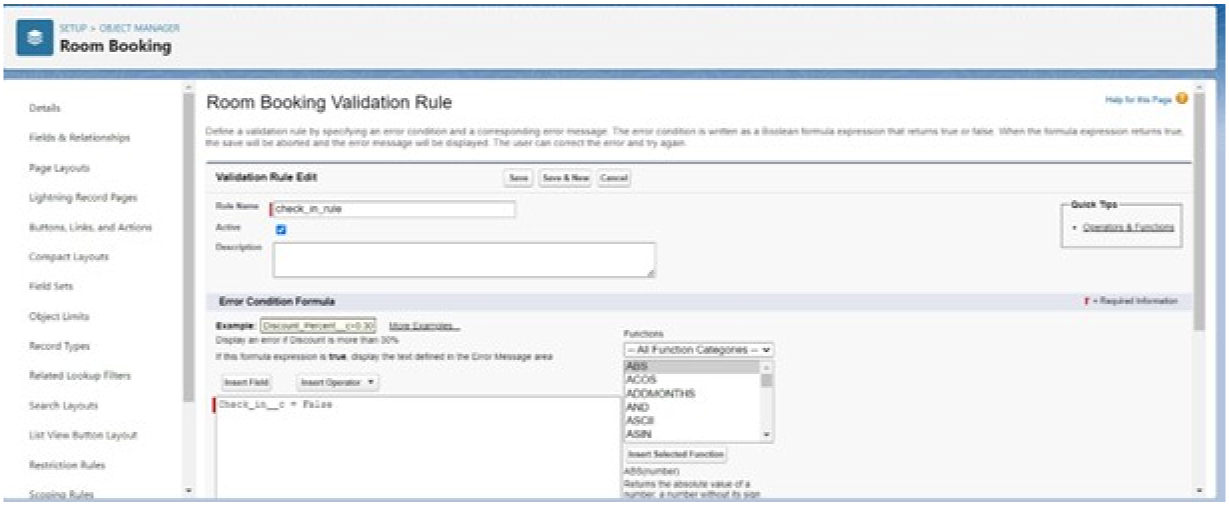
TASK 1:- Create a Validation Rule To An Room Booking Object

1. Go to setup > click on Object Manager > type object name(RoomBooking) in the searchbar > click on the object.
2. Now click on “Validation rule” at top > New.
3. Enter Rule name “checkbox field” and make the validation should be Active.
4. Enter the formula in the formula Box “Advance_payment_for_1month_c = false”and check for syntaxerror.
5. Enter the error message “Checkbox should be checked”.
6. Select error location as field(Advance payment for 1month).
7. Click on save.



TASK 2:- Create a Another Validation Rule To An Room BookingObject

1. Go to setup > click on Object Manager > type object name(Room Booking)in the search bar > click on the object.
2. Now clickon “Validation rule” attop > New.
3. Enter Rule name “check in rule” and make the validation should be Active.
4. Enter the formulain the formula Box “ Check_in_c = False ” and check for syntaxerror.
5. Enter the error message“Check box shouldbe checked”
6. Select error location as field(Check in)


SETUP > OBJECT MANAGER
Room Booking
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Room Booking Validation Rule
Help for this Page
Validation Rule Edit
Save
Save & New
Cancel
Rule Name
check_in_rule
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example:
More Examples...
Display an error if Discount is more than 30%
Insert Field
Insert Operator
Check_in__c = False
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)

7.Profile

INTRODUCTION:

Aprofile is a group/collection of settings and permissions that define what auser can do in salesforce. Profile controls “Objectpermissions, 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 profilesby the user's job function. For example System Administrator, Developer, SalesRepresentative.

Types of profilesin salesforce

1. Standard profiles:

By default salesforce provides belowstandard profiles.

a. Contract Manager
b. ReadOnly
c. Marketing User
d. Solutions Manager
e. Standard User
f. System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

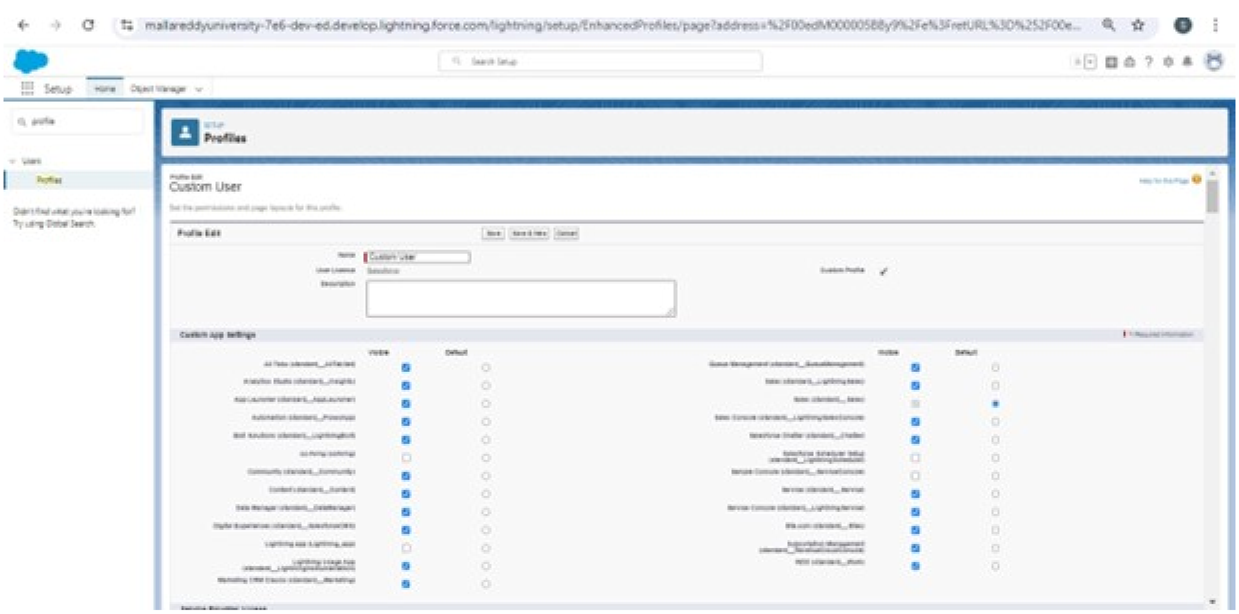
Custom ones definedby us.

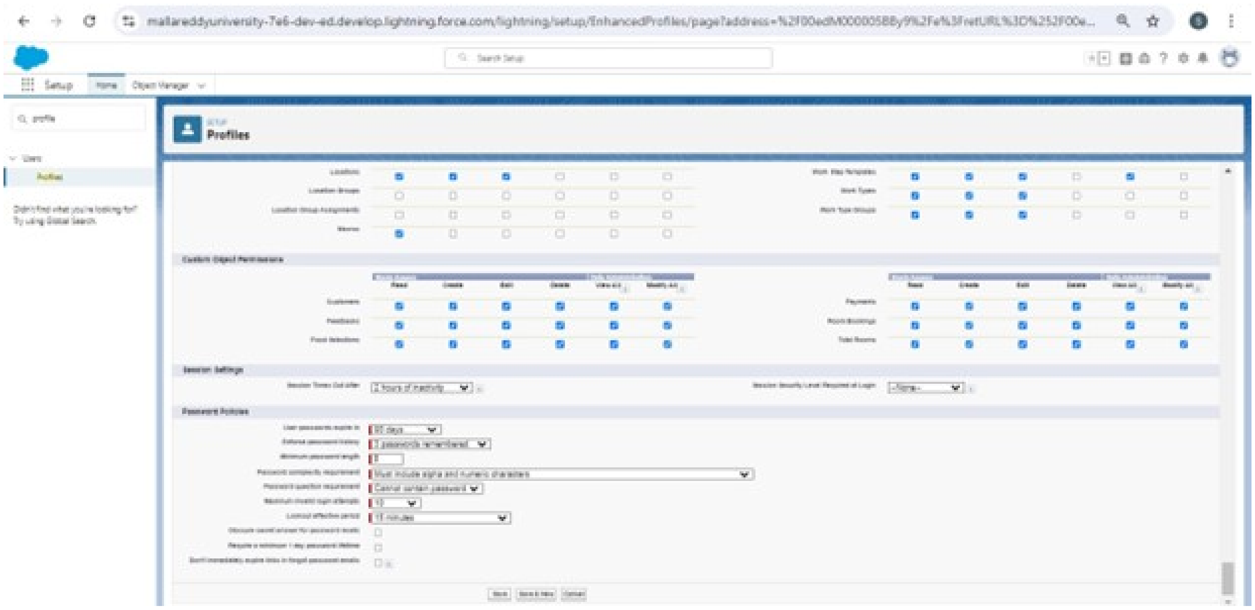
They can be deleted if there are no users assigned with that particular one.

TASK 1:- Custom User Profile

To create a new profile:

1. Go to setup > type profilesin quick find box > click on profiles > clone the desired profile(Standard User)
2. Enter profilename (Custom User)> Save.
3. While still on the profile page, then click Edit.
4. Scroll down to CustomObject Permissions and Give All access permissions for Customers, Feedbacks, Food selections, Payments,Room Bookings and Total Rooms.
5. Scroll down and Click on Save.

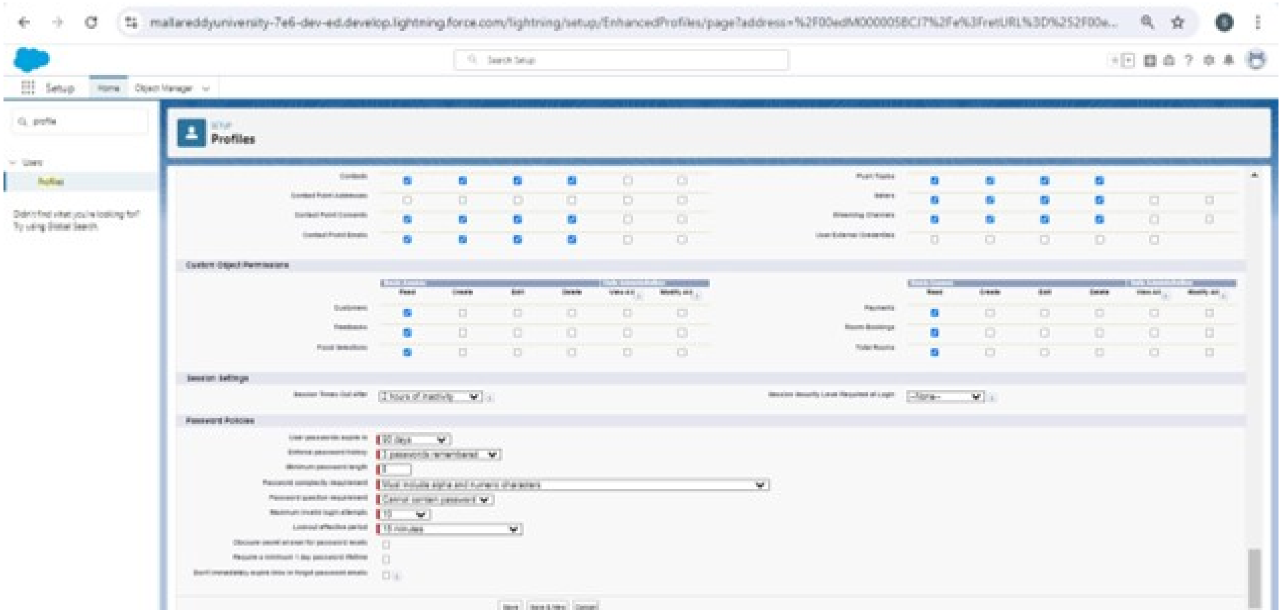




TASK 1:- Custom Platform User1

To create a new profile:

1. Go to setup > type profilesin quick find box > click on profiles > clone the desired profile (Standard platformUser)
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 accesspermissions for Customers, Feedbacks, Food selections, Payments, Room Bookingsand Total Rooms.
5. Scroll down and Click on Save.



TASK 1:- Custom Platform User2

To create a new profile:

1. Go to setup > type profilesin quick find box > click on profiles > clone the desired profile (Standard platformUser)
2. Enter profile name (Custom platform User2) > Save.
3. While still on the profile page, then click Edit.
4. Scroll down to CustomObject 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.

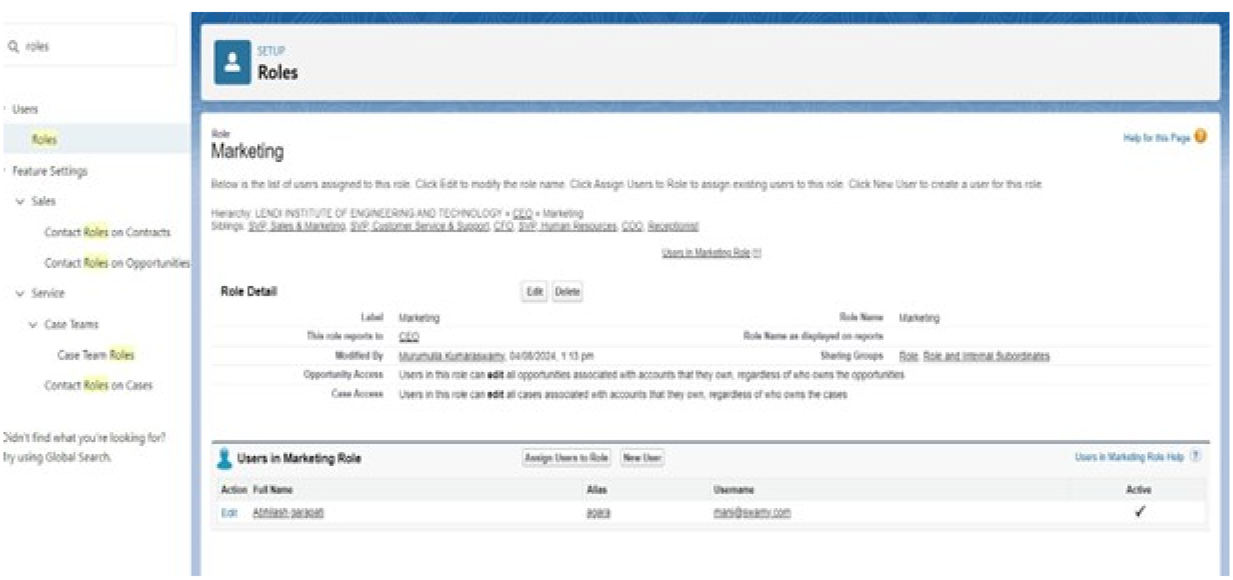
8.Roles

INTRODUCTION:-

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

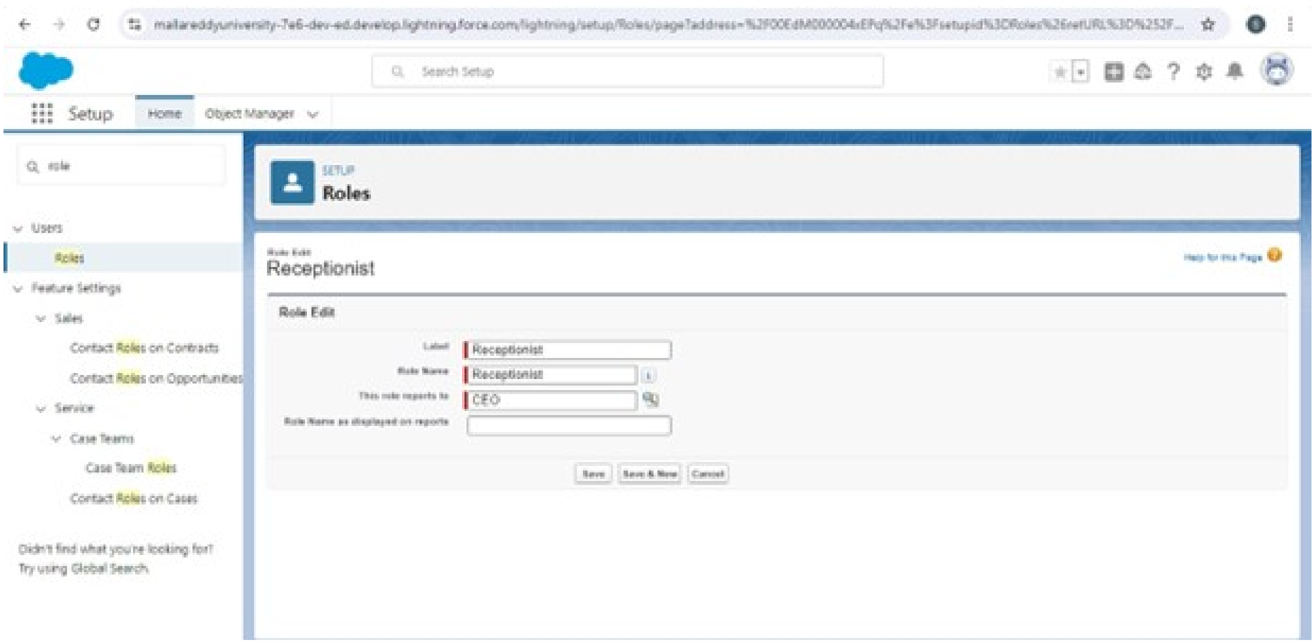
TASK 1:- Marketing Role

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.



TASK 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.



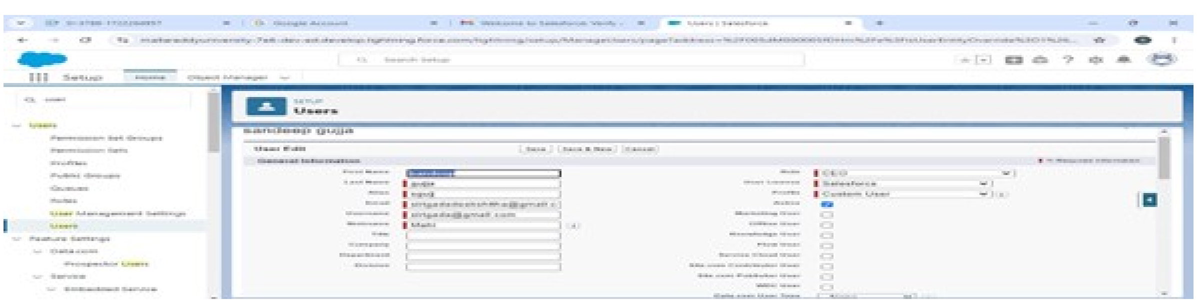
9.Users

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 accessto 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**.**

TASK 1 :- Create User

1. Activity 1- Create UserGo to setup> type usersin quick find box > select users > clickNew user.
2. Fill in the fields
   a. FirstName : sandeep
   b. LastName : gujja
   c. Alias: Give a Alias Name
   d. Emailid : Give your PersonalEmail id
   e. Username : Username should be in this form: text@text.com
   f. NickName : Give a Nickname
   g. Role : CEO
   h. User licence : Salesforce
   i. Profiles : Custom user
3. Save.



TASK 2 :- Create Another User

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

2. Fill in the fields

    a. FirstName : Abhilash

    b. LastName : garapati

    c. Alias : Give a Alias Name

    d. Emailid : Give your PersonalEmail id

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

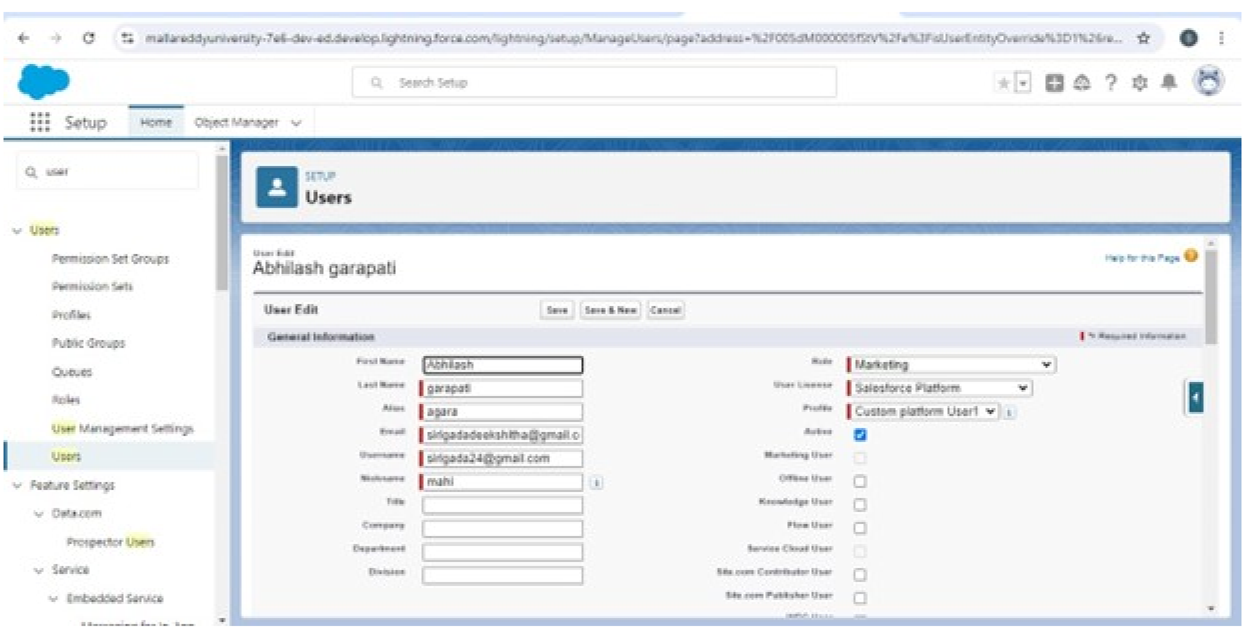
    f. NickName : Give a Nickname

    g. Role : Marketing

    h. Userlicence: Salesforce platform

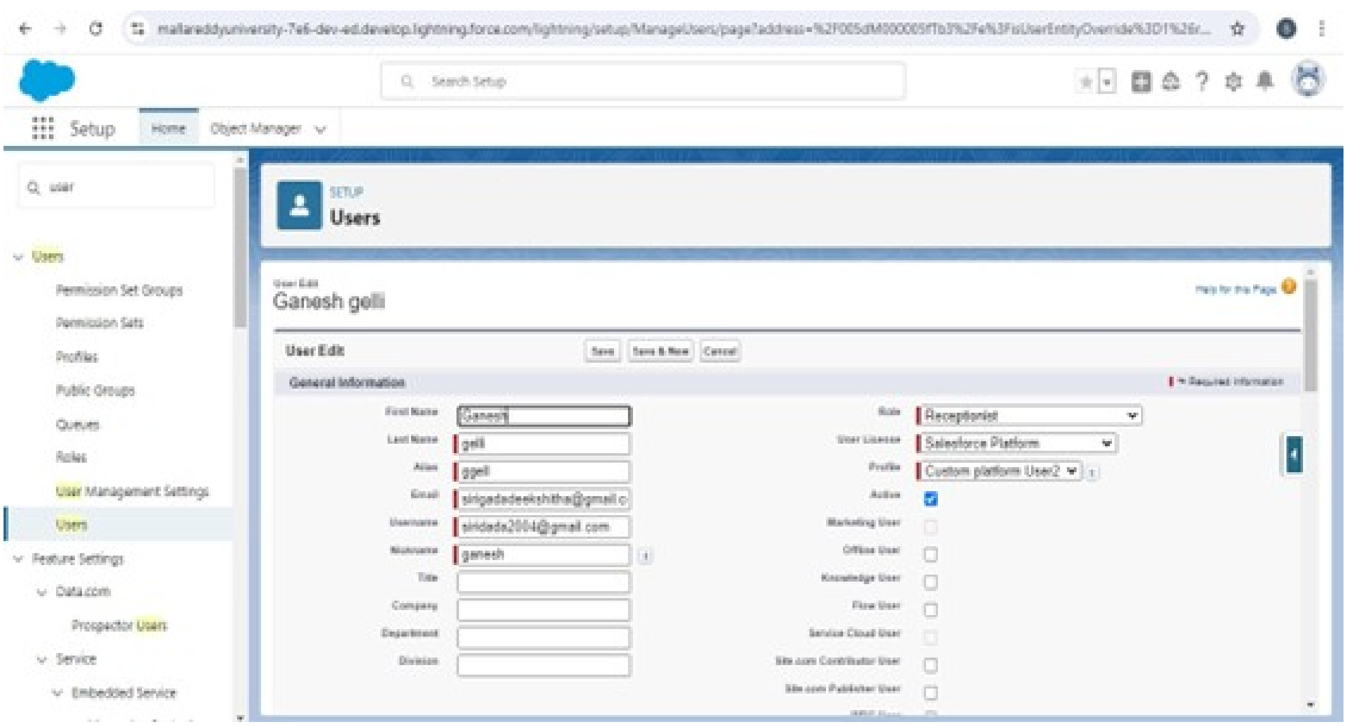
    i. Profiles : Custom Platform User1

3. save



TASK 3 :- Create Another User

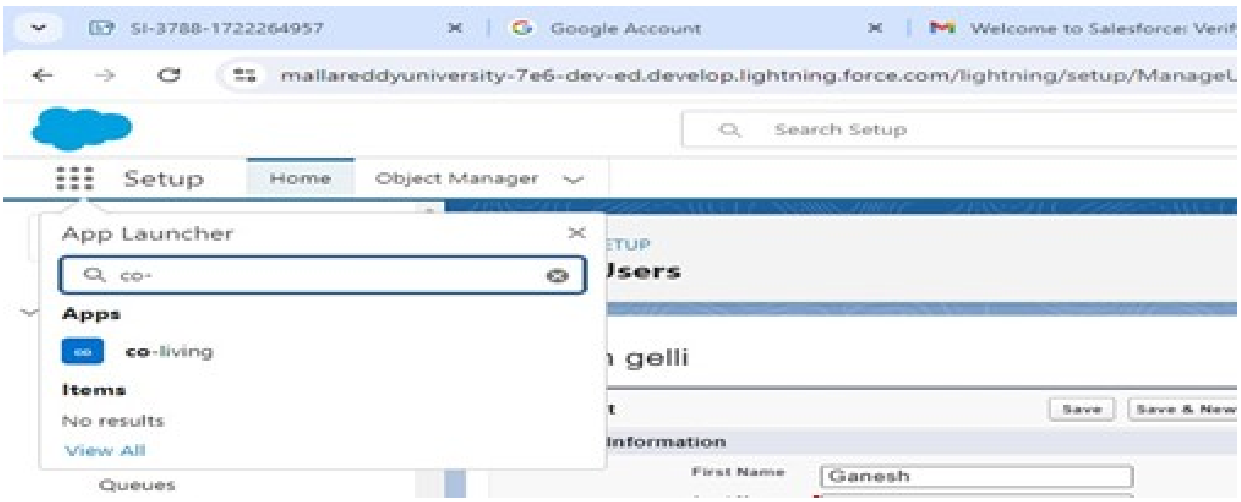
1. Go to setup > type users in quick find box > selectusers > click New user.
2. Fill in the fields
    a. FirstName : Ganesh
    b. LastName : gelli
    c. Alias: Give a Alias Name
    d. Emailid : Give your PersonalEmail id
    e. Username : Username should be in this form: text@text.com
    f. NickName: Give a Nickname
    g. Role: Receptionist
    h. Userlicence: Salesforce Platform
    i. Profiles : Custom Platformuser2
3. Save.



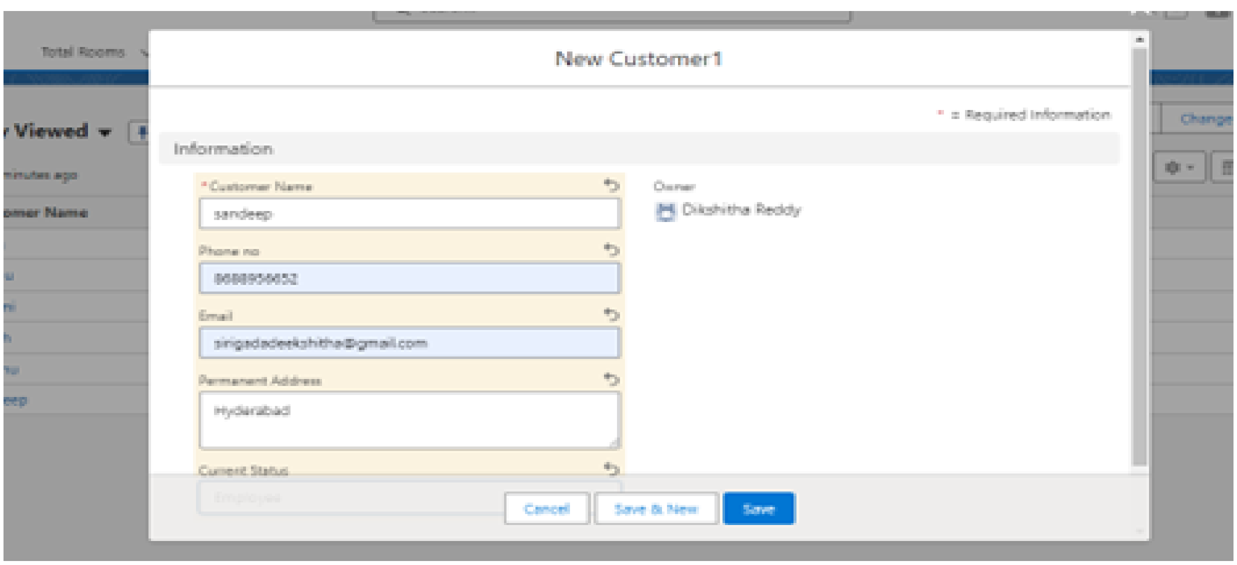
10.User Adoption

TASK 1 :- Createa Record (customers)

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

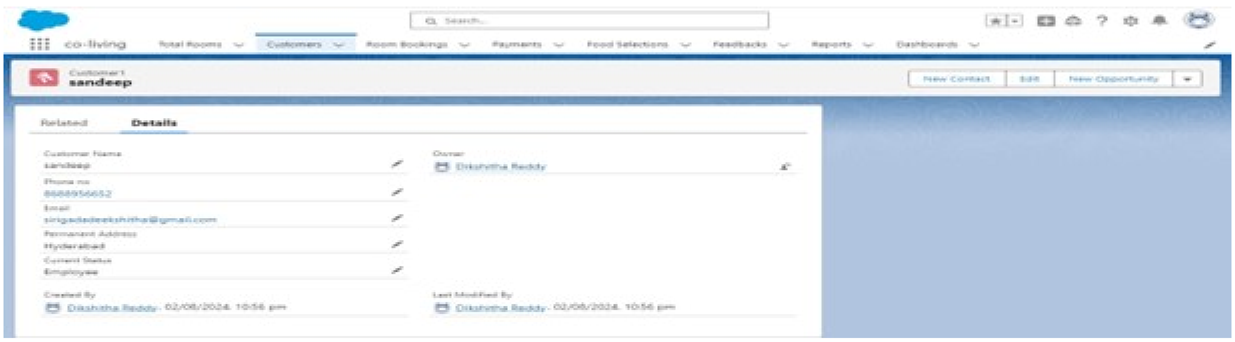


1. Click on the CustomersTab.
2. Click new and fill details &Save



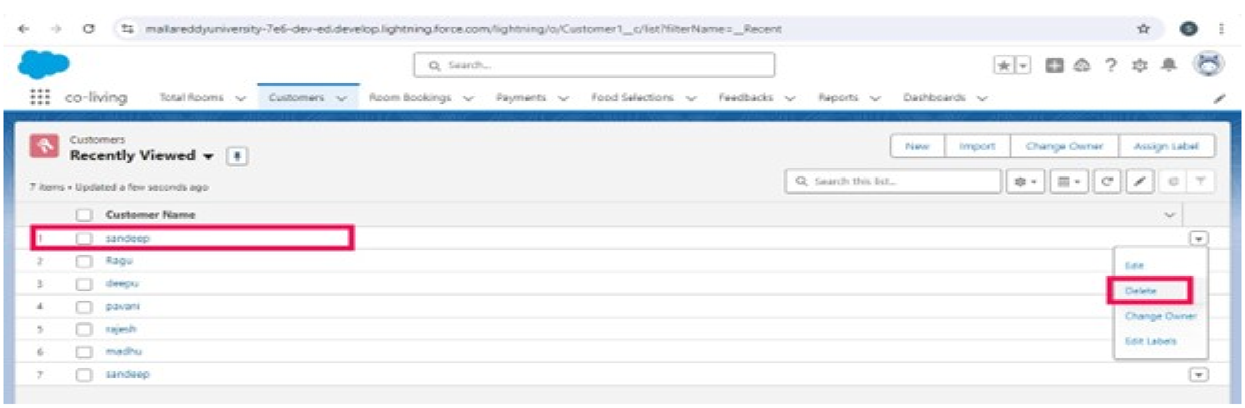
TASK 2 :- View a Record (customers)

1. Click on App Launcheron 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.



TASK 3 :- Delete a Record (customers)

1. Click on App Launcheron the left side of the screen.
2. Search Home Feels & click on it.
3. Click on the CustomersTab.
4. Click on Arrow at right hand side on that Particularrecord.
5. Click delete and delete again.



10.Reports

INTRODUCTION:

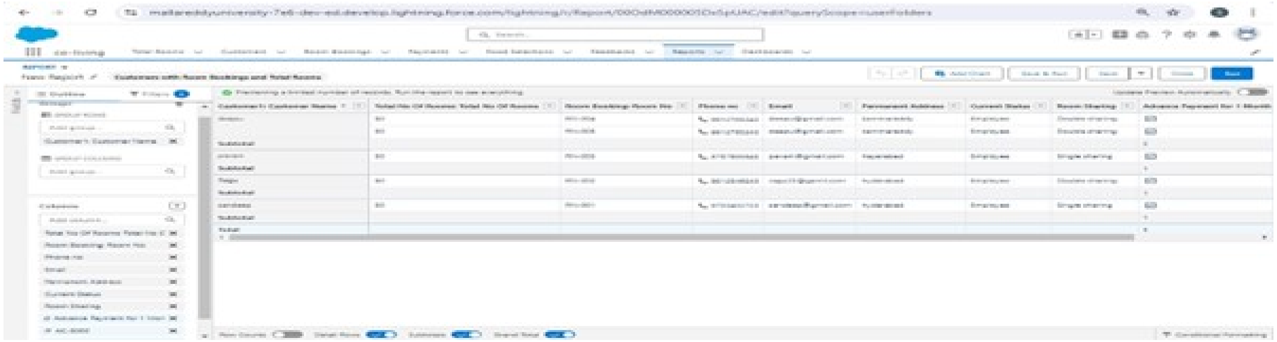
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understandformats,and share the resulting insightswith others. Before building, reading,and sharing reports,review these reportingbasics.

Types of Reportsin Salesforce

i. Tabular
ii. Summary
iii. Matrix
iv. Joined Reports

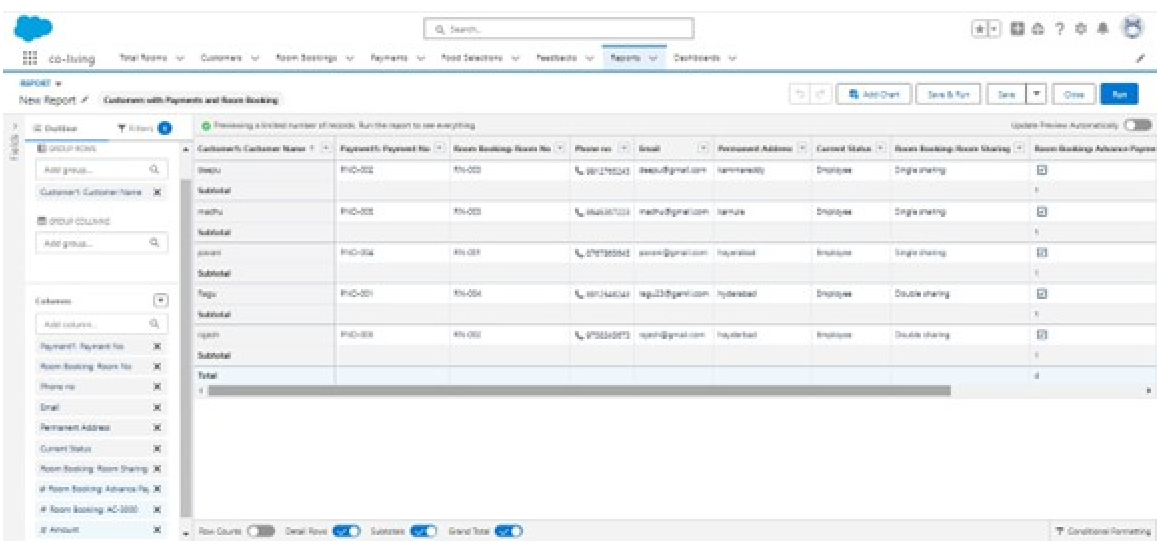
TASK 1:- Create Report

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.



TASK 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 fieldsfrom left pane as shown Above
6. Save or run it.



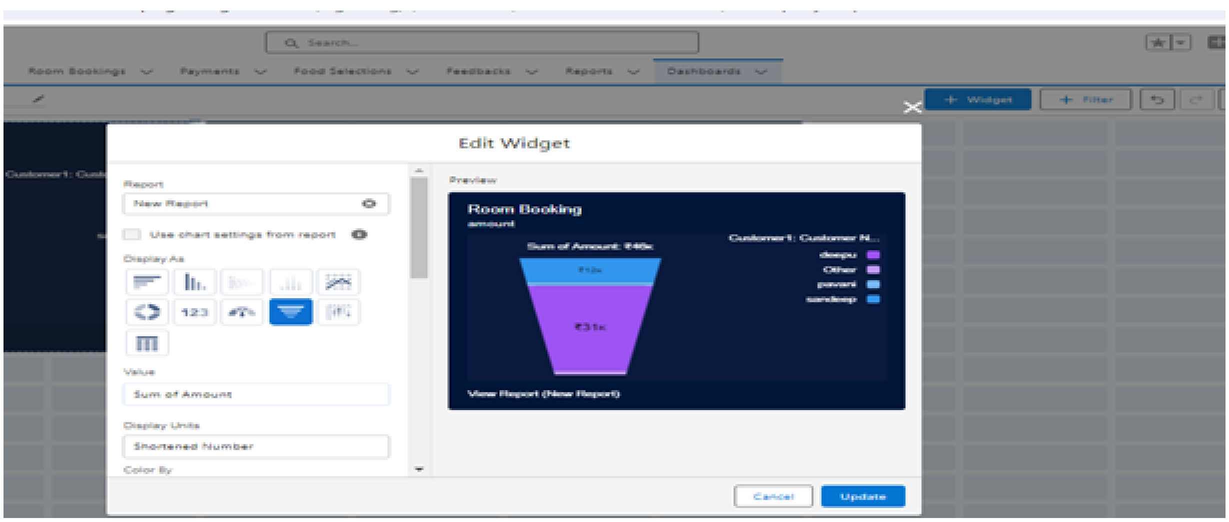
12.Dashboards

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.

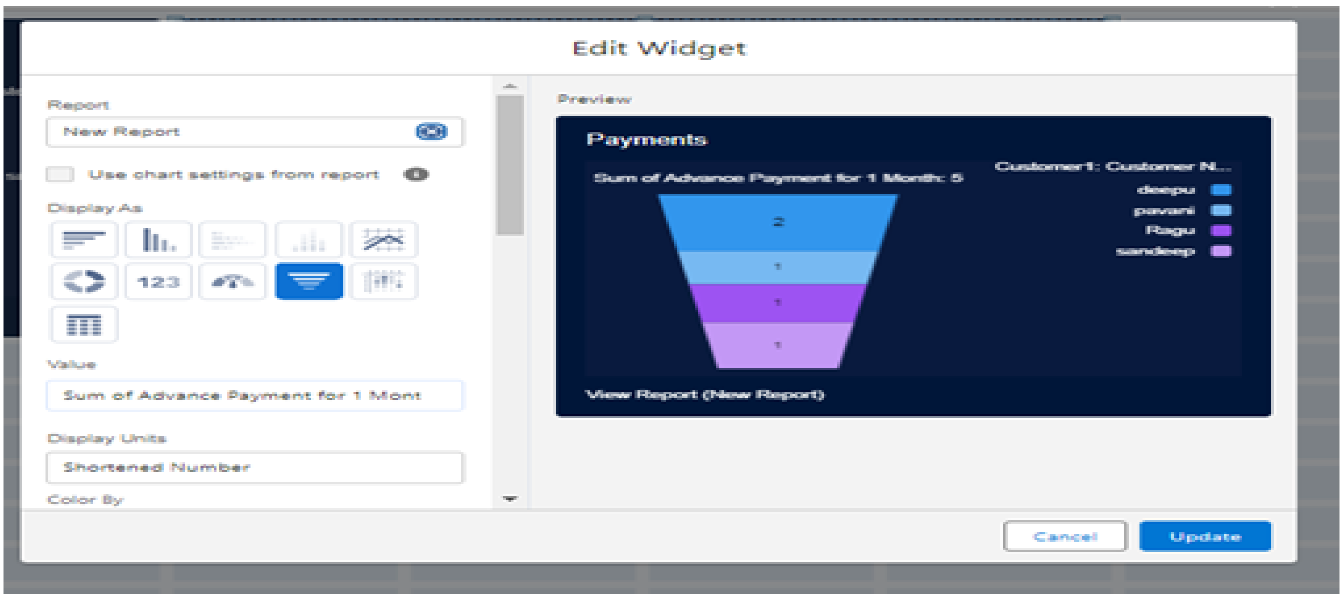
TASK 1 :- CreateDashboard

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 Customerwith Room Bookingand click on select.
5. Click Add then click on Save and then click on Done.



TASK 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.



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.

TASK 1 :- Createa Flow

1. Go to setup > type Flow in quickfind box > Click on the Flow and SelecttheNew 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 Clickon Done.
6. Under the Record-triggered Flow Click on “+” Symboland In the Drop downList select the “Decision Element”.
7. Enter the Details Label: Field should be Update, API name: GetsAutomatically Generated.
8. Enter the Outcome DetailsLabel: Single sharing,Outcome API name: Gets Automatically Generated.
    a. Resource: Select Record.Room sharing.
    b. Operator: Select Equals.

c. Value: Select Single sharing.

d. Click on “Add Condition”

e. Resource: SelectRecord.AC-3000.

f. Operator: Select Equals.

g. Value: Select False.

h. Clickon “+” Symbol In the Outcome Order.

9. Enter the Outcome Details Label: Double sharing, Outcome API name: Gets Automatically Generated.
    a. Resource: Select Record.Room sharing.
    b. Operator: Select Equals.
    c. Value: Select Double sharing.
    d. Click on “Add Condition”
    e. Resource: SelectRecord.AC-3000.
    f. Operator: Select Equals.
    g. Value: Select False.
    h. Clickon “+” Symbol In the Outcome Order.
10. Enter the Outcome Details Label: Triple sharing, OutcomeAPI name: Gets Automatically Generated.
    a. Resource: Select Record.Room sharing.
    b. Operator: Select Equals.
    c. Value: Select Triple sharing.
    d. Click on “Add Condition”
    e. Resource: SelectRecord.AC-3000.
    f. Operator: Select Equals.
    g. Value: Select False.
    h. Clickon “+” Symbol In the Outcome Order.

11. Enter the Outcome DetailsLabel: Single Ac, Outcome API name: Gets Automatically Generated.
    a. Resource: Select Record.Room sharing.
    b. Operator: Select Equals.
    c. Value: Select Single sharing.
    d. Click on “Add Condition”
    e. Resource: SelectRecord.AC-3000.
    f. Operator: Select Equals.
    g. Value: Select True.
    h. Clickon “+” Symbol In the Outcome Order.
12. Enter the Outcome Details Label: Double Ac, Outcome API name: Gets Automatically Generated.
    a. Resource: Select Record.Room sharing.
    b. Operator: Select Equals.
    c. Value: Select Double sharing.
    d. Click on “Add Condition”
    e. Resource: SelectRecord.AC-3000.
    f. Operator: Select Equals.
    g. Value: Select True.
    h. Clickon “+” Symbol In the Outcome Order.
13. Enter the Outcome DetailsLabel: Triple Ac, Outcome API name: Gets Automatically Generated.
    a. Resource: Select Record.Room sharing.
    b. Operator: Select Equals.
    c. Value: Select Triple sharing.
    d. Click on “Add Condition”
    e. Resource: SelectRecord.AC-3000.

f. Operator: Select Equals.

g. Value: Select True.

h. Clickon Done.

14. Click on “+” Symbol under the single sharingand Select the “update Records" in the drop down list.

15. Enter the update records details

    a. Label: Single.
    b. API name: Gets automatically Generated.
    c. Underthe Set Field Values for the Room Booking Record.
    d. Field: Amount.
    e. Value: 28000.
    f. Clickon Done.

16. Enterthe update records details

    a. Label: Double.
    b. API name: Gets automatically Generated.
    c. Underthe Set Field Values for the Room Booking Record.
    d. Field: Amount.
    e. Value: 24000.
    f. Clickon Done.

17. Enterthe update records details

    a. Label: Triple.
    b. API name: Gets automatically Generated.
    c. Underthe Set Field Values for the Room Booking Record.
    d. Field: Amount.
    e. Value: 20000.
    f. Clickon Done.

18. Enterthe update records details

    a. Label: Single ac1.

b. API name: Gets automatically Generated.

c. Underthe Set Field Values for the Room Booking Record.

d. Field: Amount.

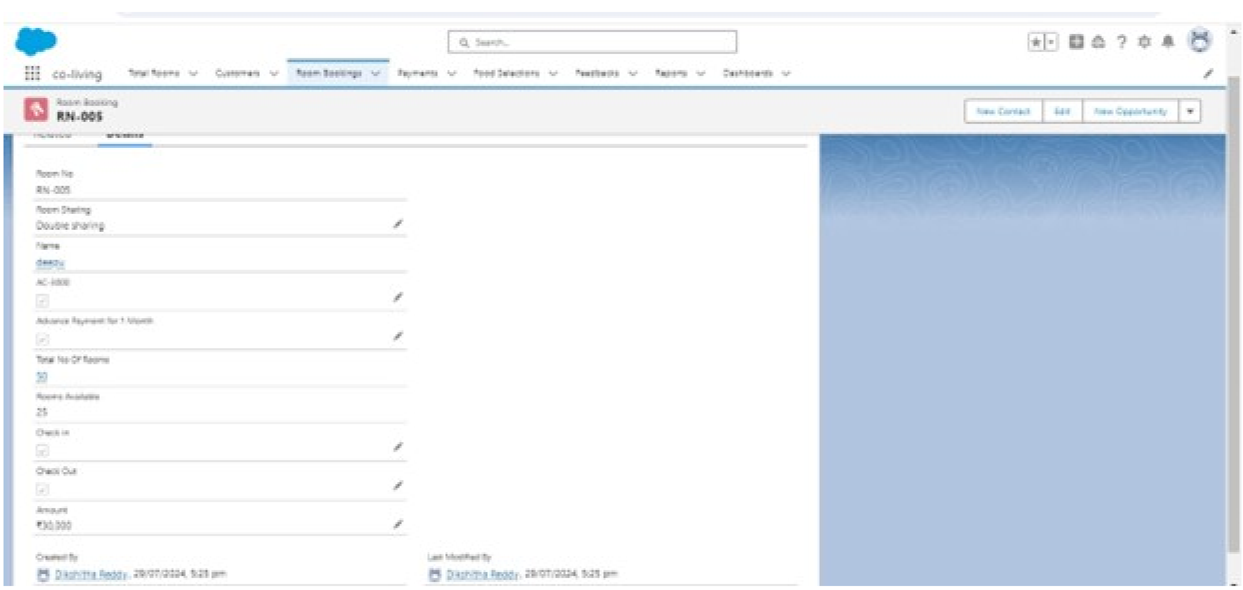
e. Value: 34000.

f. Clickon Done.

19. Enterthe update records details
    a. Label: Double ac1.
    b. API name: Gets automatically Generated.
    c. Underthe Set Field Values for the Room Booking Record.
    d. Field: Amount.
    e. Value: 30000.
    f. Clickon Done.
20. Enterthe update records details
    a. Label: Triple ac1.
    b. API name: Gets automatically Generated.
    c. Underthe Set Field Values for the Room Booking Record.
    d. Field: Amount.
    e. Value: 26000.
    f. Clickon Done.
21. TheFlow 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.

TASK 2 :- TestThe Flow

1. Go to App Launcherand 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 for1 Month. And the Amount field is empty before saving the recorde
4. After saving the record the amount gets reflected in the Amount field by using the given flows.



THANK YOU