

A CRM Application to Manage the Booking of Co-Living



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PROJECT ABSTRACT:

The Co-Living Space initiative is designed to cultivate a vibrant and inclusive community where individuals can live, work, and connect with others who share similar interests. We believe that cohabiting in a shared environment encourages collaboration, reduces feelings of isolation, and significantly enhances overall quality of life.

Our co-living space will feature a thoughtfully designed layout that strikes a balance between private areas and communal spaces. The accompanying application will store customer information, allowing users to choose from various air-conditioned rooms with multiple sharing options. Users will also have the ability to select daily meal preferences and make payments through multiple methods. Additionally, the platform will enable residents to provide feedback on services, such as room cleaning, internet connectivity, and food quality, fostering a responsive and supportive living environment.

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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.

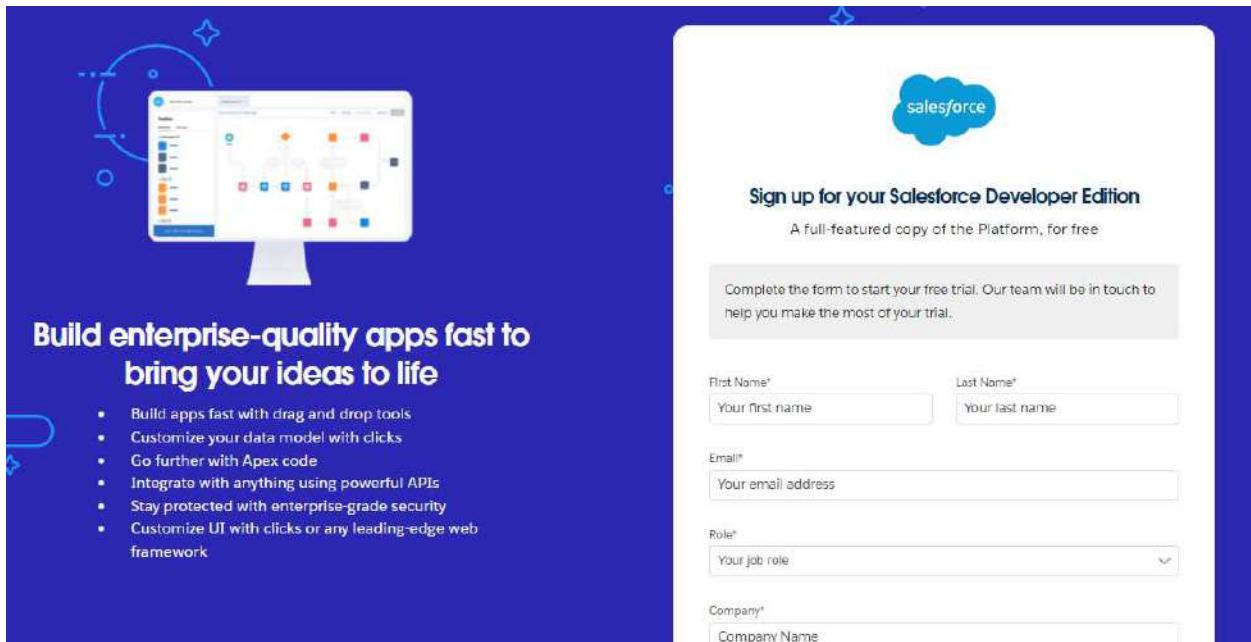
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<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

Username : should be a combination of your name and company

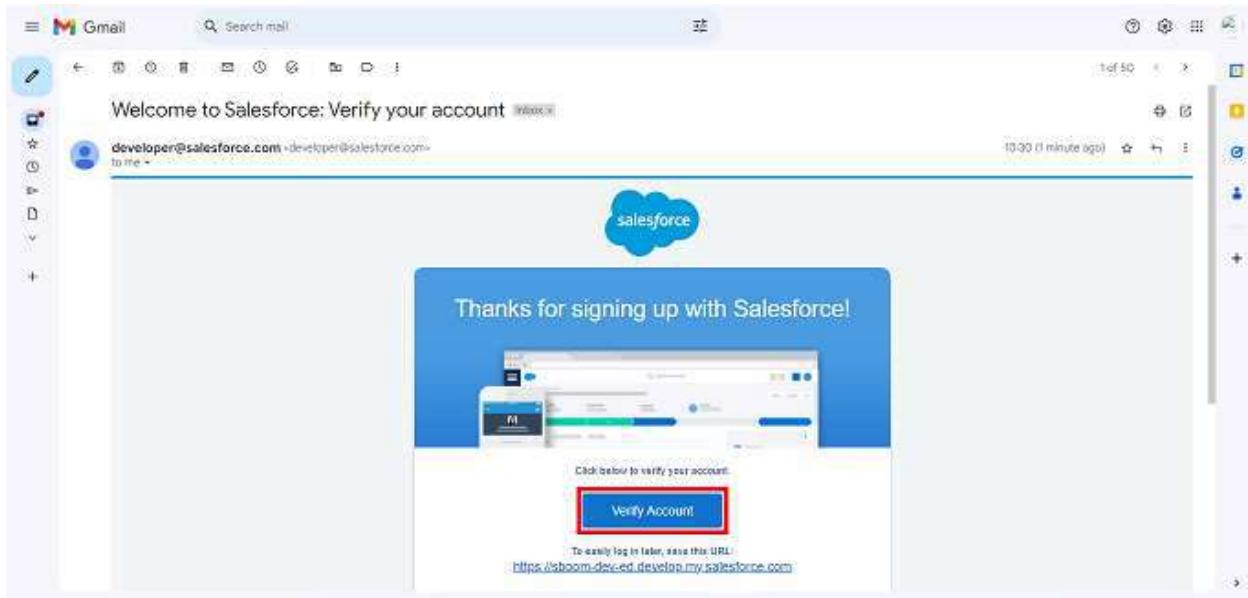
This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign me up after filling these.

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.

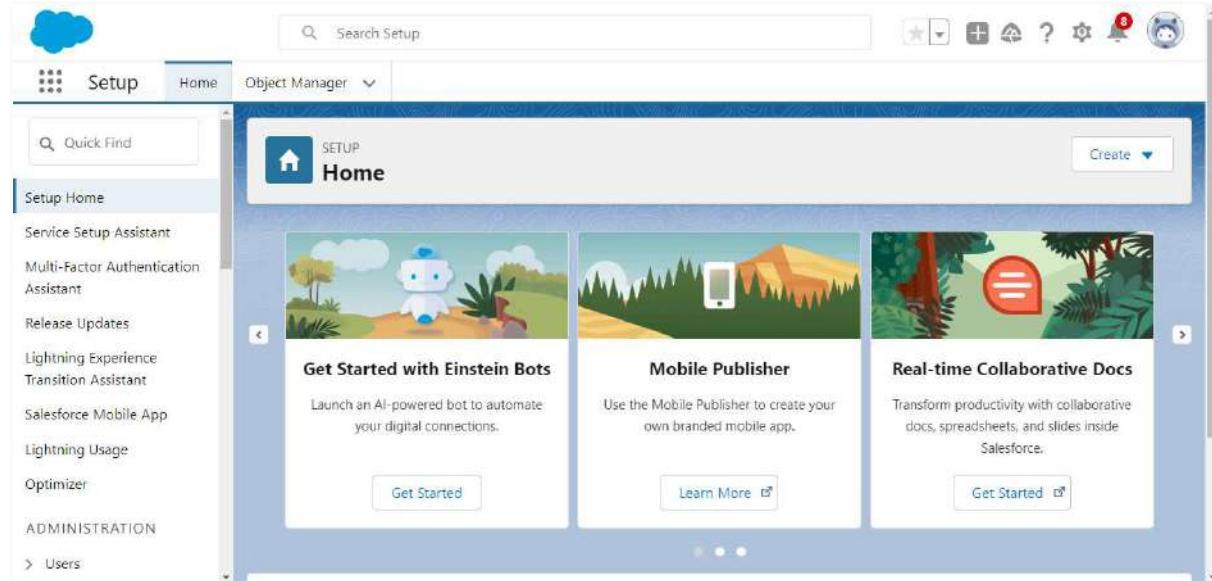


2. Click on Verify Account

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

A screenshot of a "Change Your Password" page. The title is "Change Your Password". It says "Enter a new password for lead@sb.oom. Make sure to include at least:" followed by three requirements: "8 characters", "1 letter", and "1 number". Below these are two input fields: "New Password" and "Confirm New Password", both with red borders. A red box surrounds these two fields. Underneath is a "Security Question" section with a dropdown menu showing "In what city were you born?". Below that is an "Answer" input field containing "asdfghjkl". At the bottom is a blue "Change Password" button.

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



Task 2 - Object

Introduction:

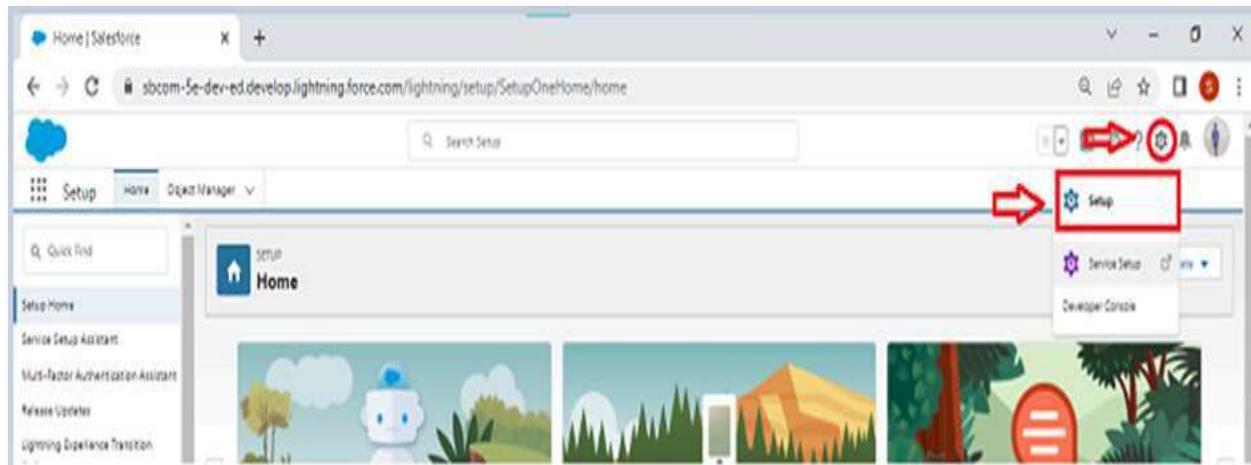
What Is an Object?

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

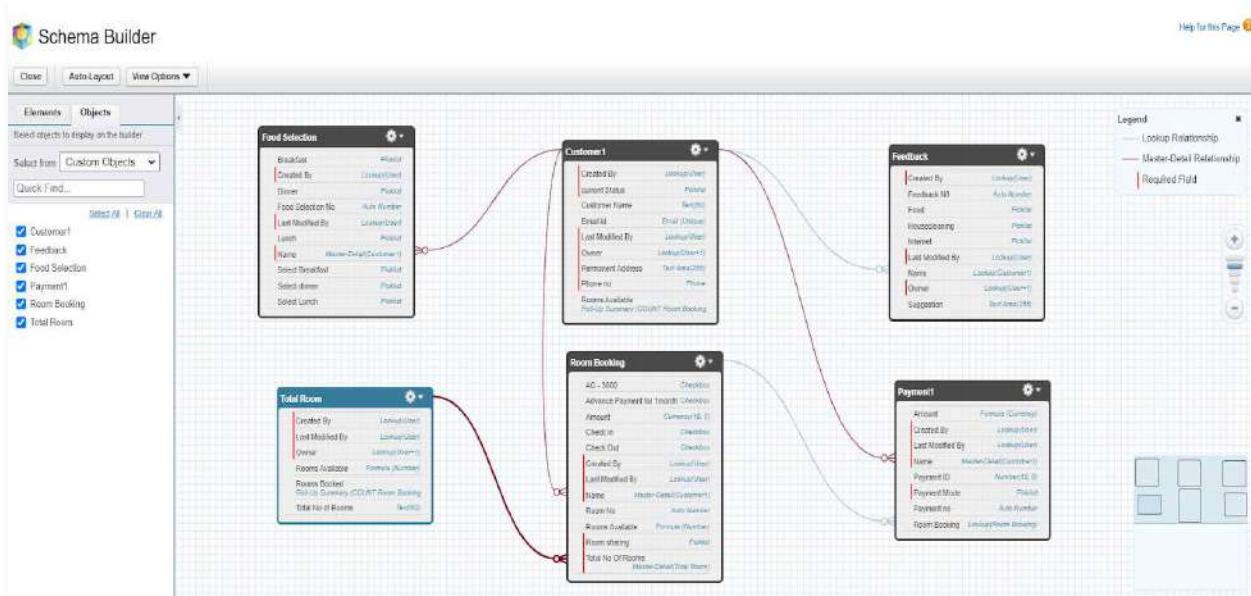
Salesforce objects are of two types:

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.

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



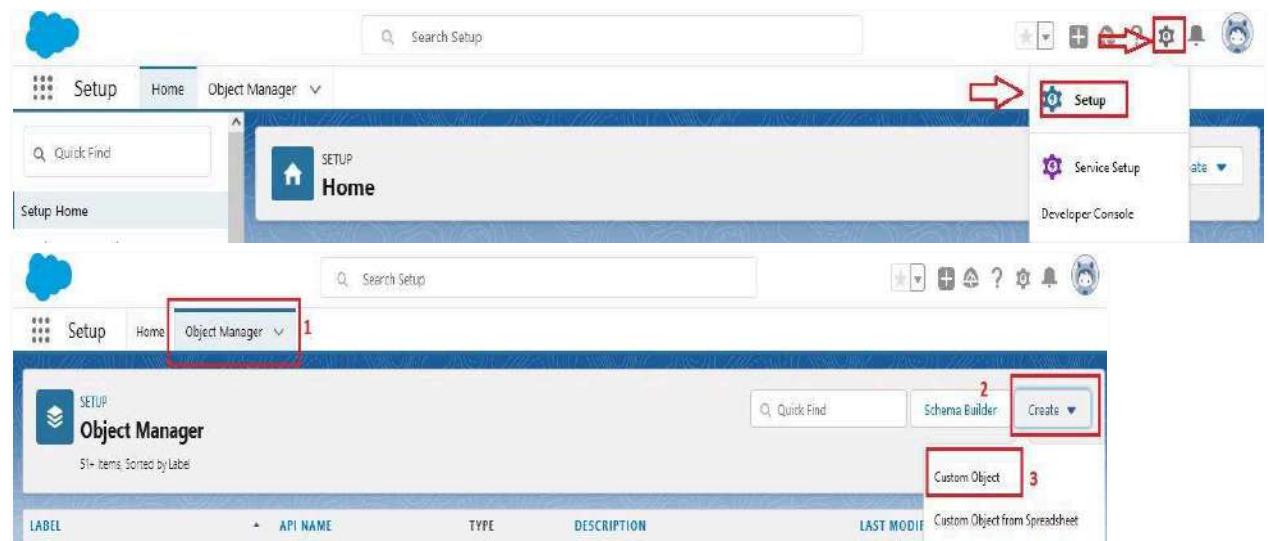
Objects and fields involved in Co-Living:



Activity 1 : 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.

The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The 'Custom Object Definition Edit' section includes:

- Custom Object Information:** Shows 'Label' as 'Total Room' and 'Plural Label' as 'Total Rooms'. A red box highlights the 'Label' field.
- Object Name:** Shows 'Object Name' as 'Total_Rooms' and 'Record Name' as 'Total No Of Rooms'. A red box highlights the 'Object Name' field.
- Description:** An empty text area.
- Content-Sensitive Help Setting:** Options to 'Open the standard Salesforce.com Help & Training window' or 'Open a webpage using a Visualforce page'.
- Enter Record Name Label and Format:** Shows 'Record Name' as 'Total No Of Rooms' and 'Example: Account Name'. A red box highlights the 'Record Name' field.
- Optional Features:** Includes checkboxes for 'Allow Reports' (selected) and 'Allow Field History'. A red arrow points to the 'Allow Reports' checkbox.
- Object Classification:** Shows 'Allow Sharing' and 'Allow Bulk API Access' checked.
- Deployment Status:** Shows 'Deployed' selected.
- Search Status:** Shows 'Allow Search' selected. A red arrow points to the 'Allow Search' checkbox.
- Object Creation Options:** Shows 'Add Notes and Attachments related list to default page layout' checked.
- Action Bar:** Buttons for 'Save', 'Save & New', and 'Cancel'.

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

Activity-2: 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.
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.

Activity-3: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.

Activity: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 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.

Activity-5: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.

Activity-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 "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.

Task-3 Tab:

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

Types of Tabs:

1. Custom Tabs

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

2. Web Tabs

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

3. Visualforce Tabs

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

4. Lightning Component Tabs

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

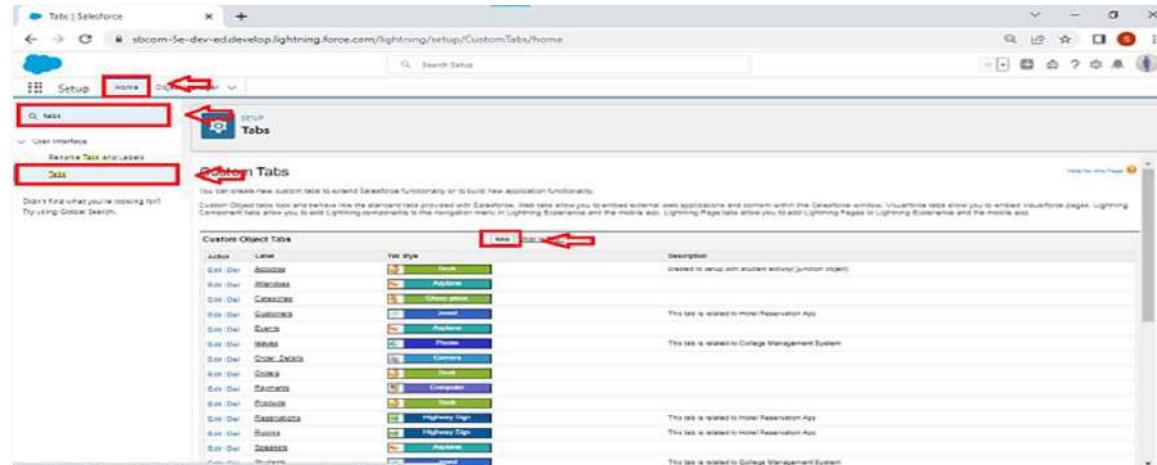
5. Lightning Page Tabs

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

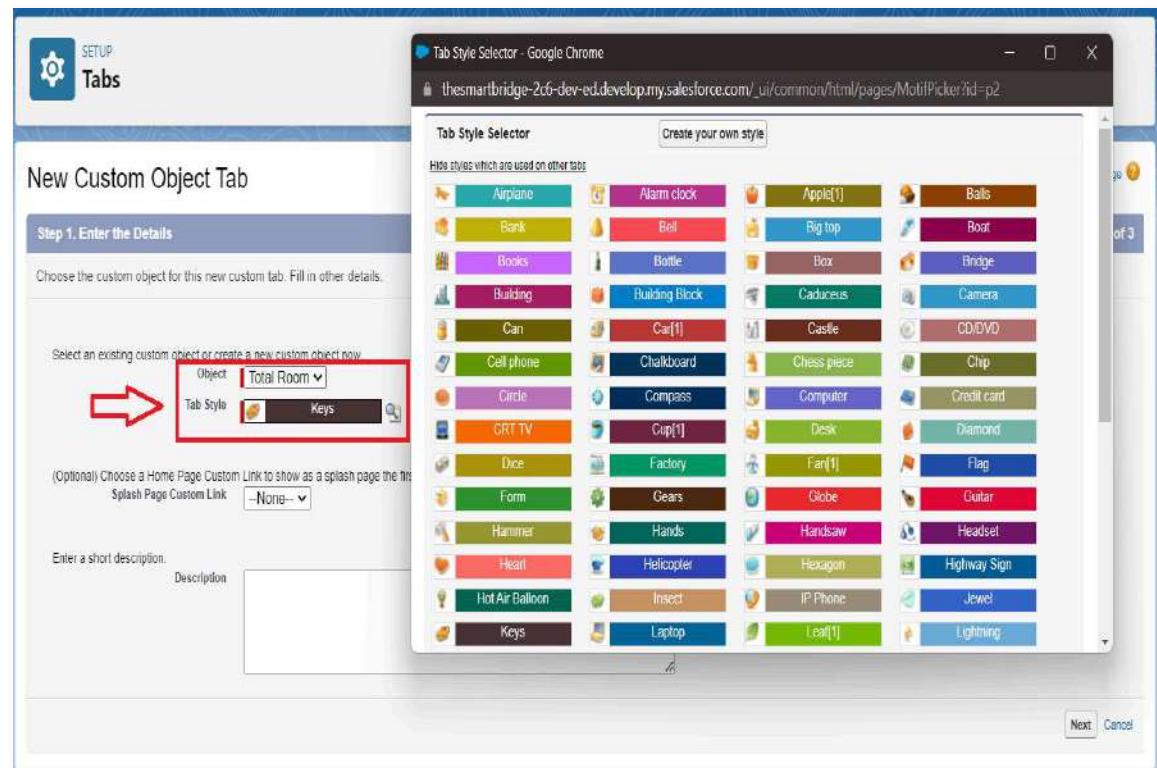
Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Activity-1: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)



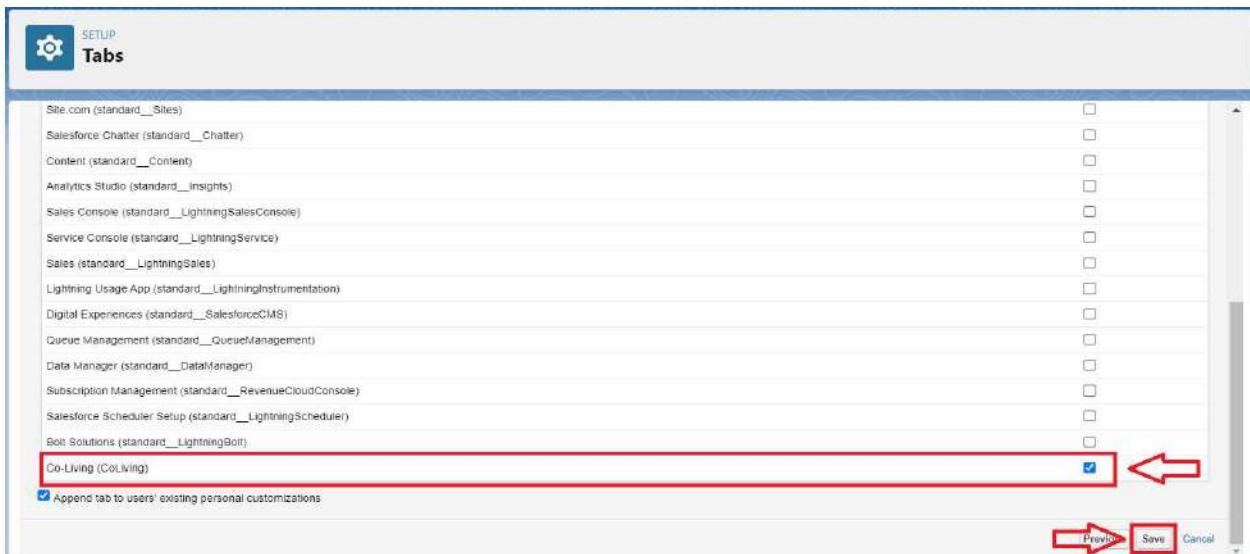
2. Select Object(Total Rooms) > Select the tab style.



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

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

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.

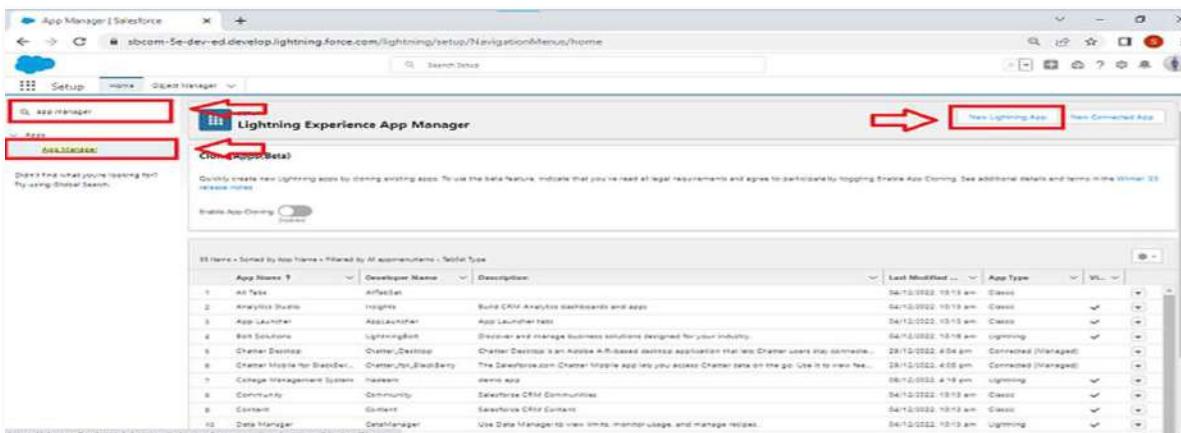
Task-4:The Lightning App

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

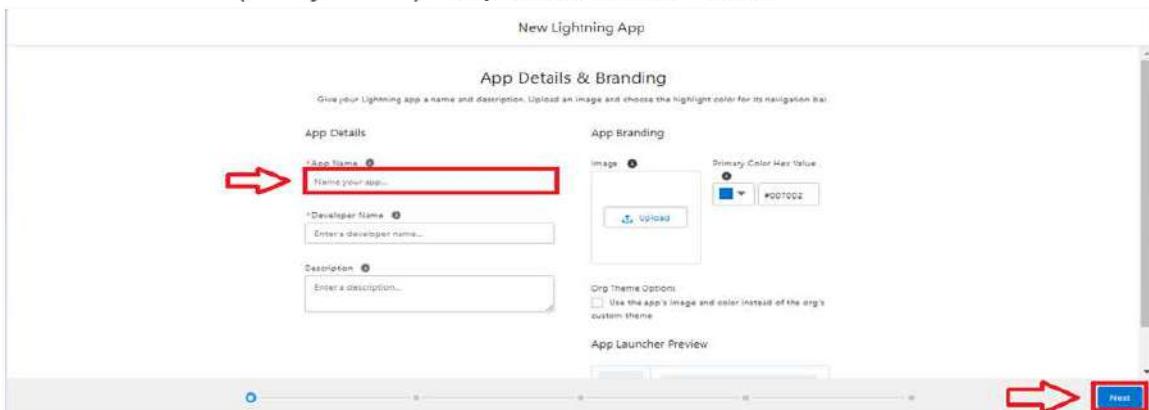
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Activity-1:Create a Lightning App

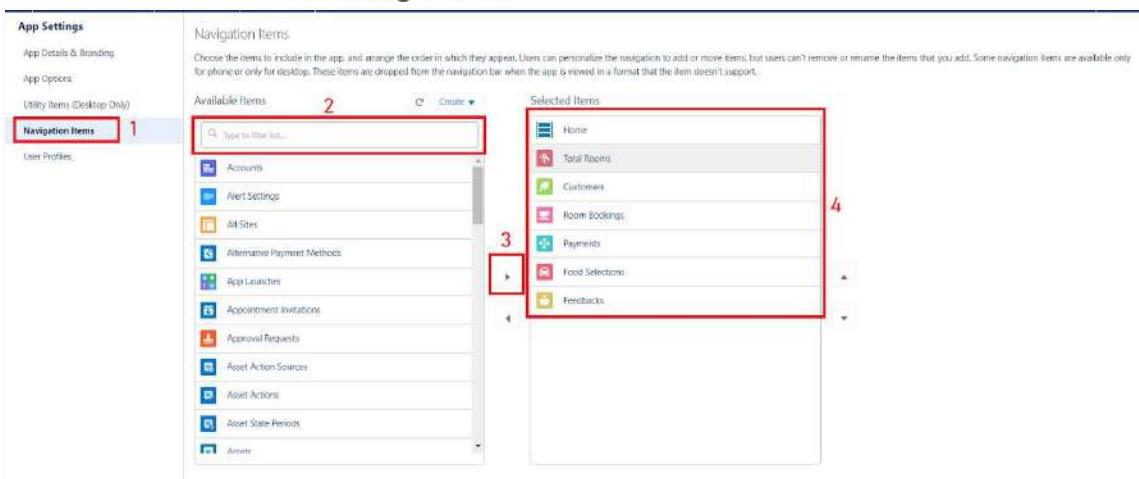
1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.



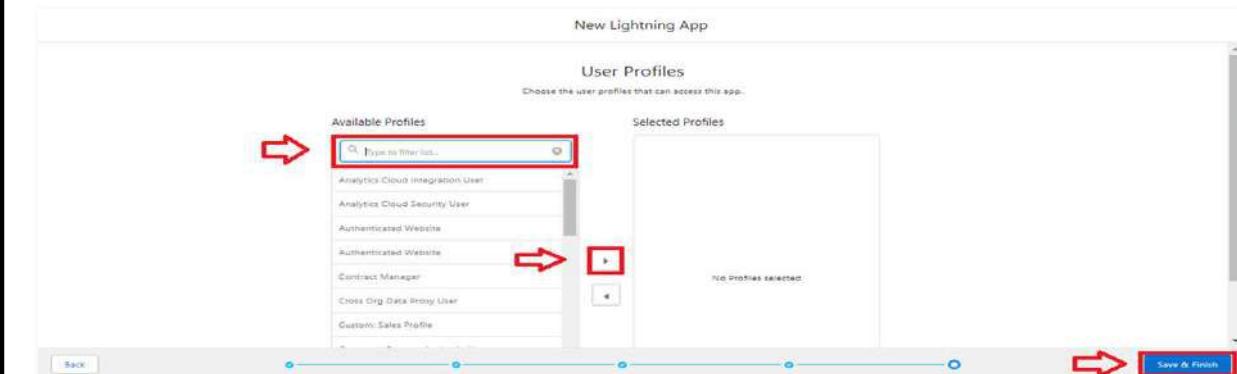
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.



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.



4. To Add User Profiles:



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

Task-5:Fields & Relationships

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.

Activity-1:Creation of fields for the customer1 object

1. To create fields in an object:

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

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'SETUP' and 'Object Manager'. Below it, the 'Object Manager' section displays a list of objects. A red box highlights the row for 'Customer1', which has 'Customer_c' as its name and 'Custom Object' as its type. An arrow points to the dropdown menu icon next to the creation date '12/06/2023'. The list also includes other standard objects like Credit Memo, Credit Memo Line, and Customer.

Name	Object Name	Type
Credit Memo	CreditMemo	Standard Object
Credit Memo/Invoice Application	CreditMemoInvoiceApplication	Standard Object
Credit Memo Line	CreditMemoLine	Standard Object
Customer	Customer	Standard Object
Customer1	Customer_c	Custom Object
D&B Company	DandBCompany	Standard Object
Data Use Legal Basis	DataUseLegalBasis	Standard Object
Data Use Purpose	DataUsePurpose	Standard Object
Digital Wallet	DigitalWallet	Standard Object
Duplicate Record Item	DuplicateRecordItem	Standard Object
Duplicate Record Set	DuplicateRecordSet	Standard Object
Email Message	EmailMessage	Standard Object

2. Now click on “Fields & Relationships” > New

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it, the object name 'Customer1' is selected. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Lightning Record Pages', etc. The main area is titled 'Fields & Relationships' and contains a table with columns: FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the 'New' button at the top right of the table header.

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

3. Select Data Type as a “Phone”

The screenshot shows the 'Customer1' object setup page. The 'Fields & Relationships' section is selected in the sidebar. In the main area, a list of data types is shown on the left, and their descriptions are on the right. The 'Phone' option is highlighted with a red box and a red arrow pointing to its description: 'Allows users to enter any phone number. Automatically formats it as a phone number.'

4. Click on next

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Phone no' is being created for the 'Customer1' object. The 'Field Information' section is highlighted with a red box, showing the 'Field Label' and 'Field Name' fields. A second red box highlights the 'Required' checkbox under the 'General Options' section.

5. Fill the Above as following:

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

2. To create another fields in an object:

1. Go to setup > click on Object Manager > type 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.

3. 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 “Text Area” and Click on Next
4. Fill the Above as following:
 - Field Label: Permanent Address

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

4. 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 :It's 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.

Object Manager		
163+ items. Sorted by Label		
Resource Absence	ResourceAbsence	Standard Object
Resource Preference	ResourcePreference	Standard Object
Return Order	ReturnOrder	Standard Object
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object
Return Order Item Tax	ReturnOrderItemTax	Standard Object
Return Order Line Item	ReturnOrderLineItem	Standard Object
Room Booking	Room_Booking__c	Custom Object
Scorecard	Scorecard	Standard Object
Scorecard Association	ScorecardAssociation	Standard Object
Scorecard Metric	ScorecardMetric	Standard Object
Seller	Seller	Standard Object
Service Appointment	ServiceAppointment	Standard Object

2. Now click on "Fields & Relationships" > New

Fields & Relationships					
8 Items. Sorted by Field Label					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
AC - 3000	AC__c	Checkbox			
Advance payment for 1month	Advance_payment_for_1month__c	Checkbox			
Amount	Amount__c	Currency(18, 0)			
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Name	Name__c	Master-Detail(Customer1)		✓	
Room No	Name	Auto Number		✓	

3. Select Data Type as a "Picklist"

The screenshot shows the Salesforce Setup interface with the 'Room Booking' object selected. In the left sidebar, under 'Fields & Relationships', the 'Picture' field type is highlighted with a red box. The description for 'Picture' states: 'Allows users to select a value from a list you define'. A red arrow points to this description.

4. Click on Next

The screenshot shows the 'Step 2, Enter the details' page for creating a new field. The 'Field Label' is set to 'Room Sharing' (1). Under the 'Values' section, the 'Enter values, with each value separated by a new line' option is selected (2). Below the field, the 'Required' checkbox is checked (3).

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.

Object Name	Object Label	Type	Last Modified
ResourceAbsence	ResourceAbsence	Standard Object	
ResourcePreference	ResourcePreference	Standard Object	
Return Order	ReturnOrder	Standard Object	
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object	
Return Order Item Tax	ReturnOrderItemTax	Standard Object	
Return Order Line Item	ReturnOrderLineItem	Standard Object	
Room Booking	Room_Booking__c	Custom Object	07/06/2023
Scorecard	Scorecard	Standard Object	
Scorecard Association	ScorecardAssociation	Standard Object	
Scorecard Metric	ScorecardMetric	Standard Object	
Seller	Seller	Standard Object	
Service Appointment	ServiceAppointment	Standard Object	

2. Now click on "Fields & Relationships" > New

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

3. Select Data Type as a "Master-detail Relationship"

4. Click on Next

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

Data Type

Master-Detail Relationship

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

None Selected

Auto Number

Formula

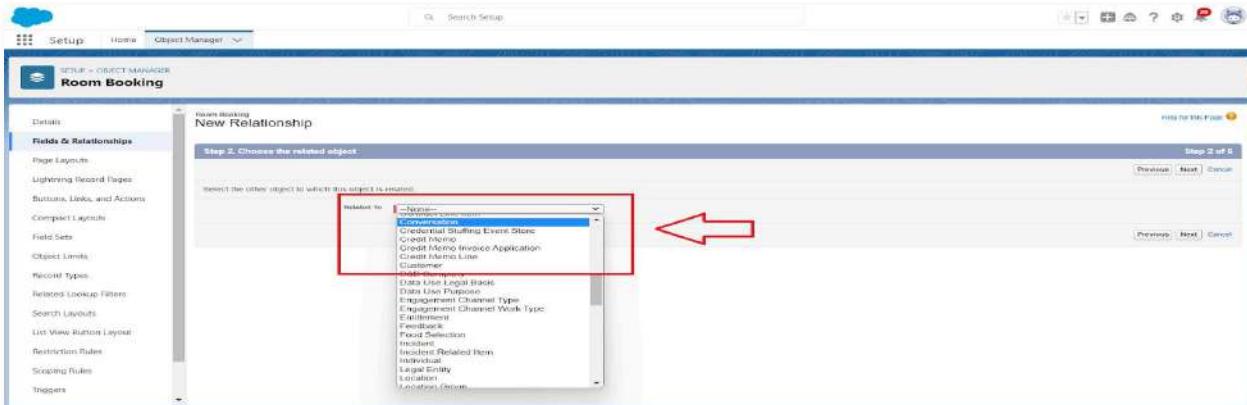
Rollup Summary

Lookup Relationship

External Lookup Relationship

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 Rollup Summary Field in “Total Room Object”

1. After Creating the Master- Detail Relationship Than Only you can create the Rollup 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

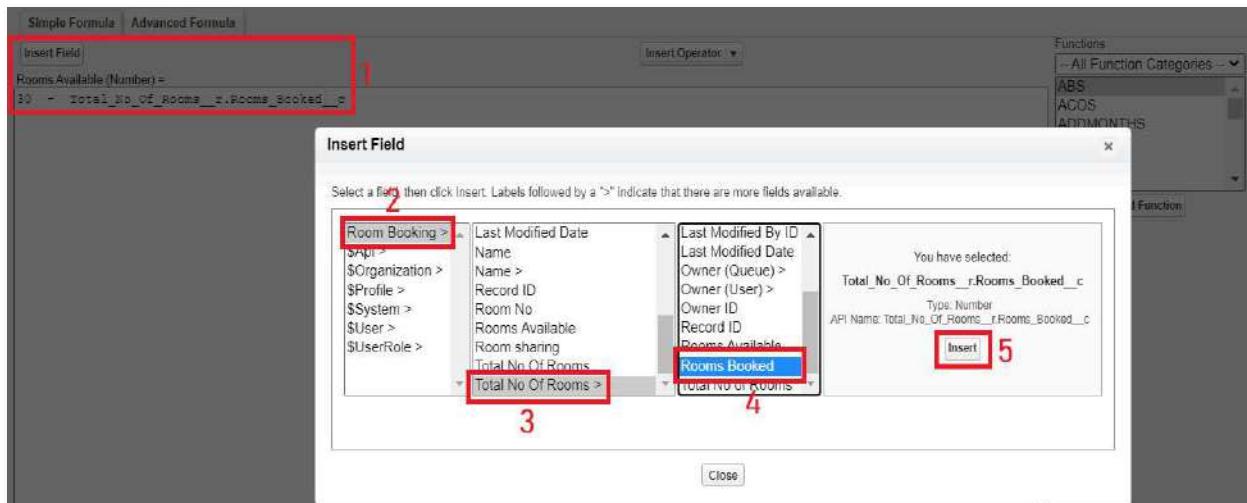
The screenshot shows the 'New Custom Field' wizard in Salesforce. It is on Step 3 of 5, titled 'Step 3. Define the summary calculation'. The 'Master Object' is set to 'Total Room'. The 'Summarized Object' dropdown is set to 'Room Bookings' (highlighted with a red box and arrow). In the 'Select Roll-Up Type' section, the 'COUNT' radio button is selected (also highlighted with a red box and arrow). Other options like 'SUM', 'MIN', and 'MAX' are available but not selected. A 'Field to Aggregate' dropdown is set to 'None'. At the bottom, there are filter criteria options: 'All records should be included in the calculation' (selected) and 'Only records meeting certain criteria should be included in the calculation'. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

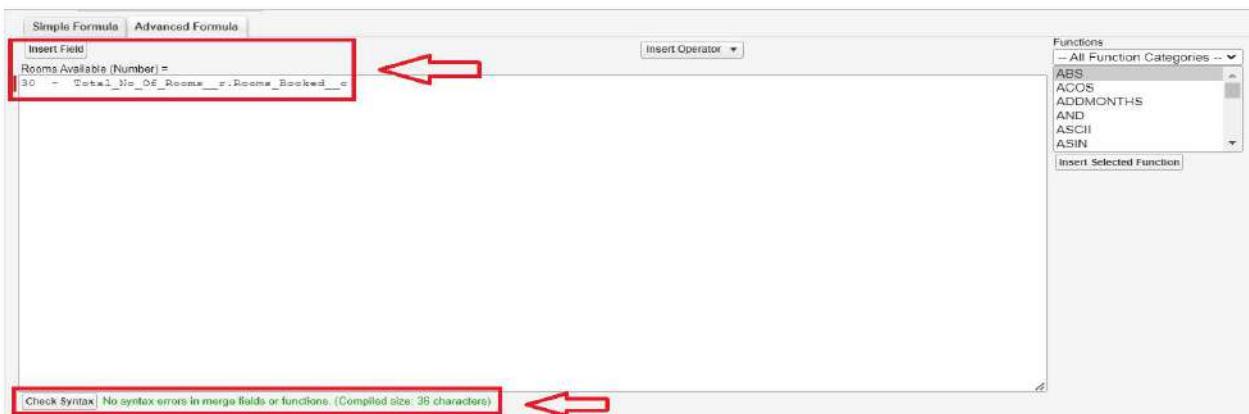
7. Click on Next > Next > Save and new

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.

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.

The screenshot shows the Salesforce Object Manager interface. At the top left, there is a blue header bar with the Salesforce logo, 'Setup', 'Home', and 'Object Manager'. Below this is a search bar with the placeholder 'Search Setup'. The main area is titled 'Object Manager' with a subtitle '153+ Items, Sorted by Label'. A red arrow points to the 'Object Manager' title. The list of objects includes: Party Consent, Payment, Payment Authorization, Payment Authorization Adjustment, Payment Gateway, Payment Group, Payment Line Invoice, Payment1, Price Book, Price Book Entry, Problem, Problem Related Item, Process Exception, and Product. The 'Payment1' row is highlighted with a red box around its entire row. To the right of the row, there is a date field containing '06/06/2023' with a dropdown arrow, also highlighted with a red box.

2. Now click on "Fields & Relationships" > New

The screenshot shows the 'Fields & Relationships' page for the 'Payment1' object. At the top left, there is a blue header bar with the Salesforce logo, 'Setup', 'Home', and 'Object Manager'. Below this is a search bar with the placeholder 'Search Setup'. The main area has a title 'SETUP > OBJECT MANAGER' with a subtitle 'Payment1'. A red arrow points to the 'Payment1' subtitle. On the left, there is a sidebar with various navigation options: Details, Fields & Relationships (highlighted with a red box), 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, and Triggers. A red arrow points to the 'Fields & Relationships' option. The main table is titled 'Fields & Relationships' with a subtitle '3 Items, Sorted by Field Label'. It has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the 'New' button at the top right of the table. The table contains the following data:

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

3. Select Data Type as a "Master-detail Relationship"

The screenshot shows the Salesforce Object Manager interface for creating a new object named 'Payment1'. In the 'Fields & Relationships' section, the 'Data Type' is set to 'Master-Detail Relationship'. A red box highlights the 'Master-Detail Relationship' option, and a red arrow points to it from the left. Another red box highlights the detailed description of the relationship type, and a red arrow points to it from the right.

4. Click on Next

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

The screenshot shows the 'New Relationship' step in the Salesforce setup wizard for the 'Payment1' object. In the 'Step 2. Choose the related object' section, the 'Related To' dropdown menu is open, showing a list of objects. The 'Customer' option is highlighted with a red box, and a red arrow points to it from the left. The dropdown menu also lists other options like 'Credit Memo Line', 'D&B Company', etc.

Setup > Object Manager > Payment1

Fields & Relationships

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

Field Label: Name
Field Name: Name

Child Relationship Name: Payments1

Sharing Settings: ReadWrite (selected)

Allow Reporting: Auto add to custom report type (checkbox checked)

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.

Setup > Object Manager

Object Name	Object Label	Type
Party Consent	PartyConsent	Standard Object
Payment	Payment	Standard Object
Payment Authorization	PaymentAuthorization	Standard Object
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object
Payment Gateway	PaymentGateway	Standard Object
Payment Group	PaymentGroup	Standard Object
Payment Line Invoice	PaymentLineInvoice	Standard Object
Payment1	Payment_1	Custom Object
Price Book	Pricebook2	Standard Object
Price Book Entry	PricebookEntry	Standard Object
Problem	Problem	Standard Object
Problem Related Item	ProblemRelatedItem	Standard Object
Process Exception	ProcessException	Standard Object
Product	Product2	Standard Object

2. Now click on "Fields & Relationships" > New

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. Below this, the main area is titled 'SETUP > OBJECT MANAGER' with 'Payment1' selected. A red arrow points to the 'Payment1' label. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and shows a table of existing fields. A red arrow points to the 'New' button at the top right of the table header.

3. Select Data Type as a "Lookup Relationship"

4. Click on Next

The screenshot shows the 'Data Type' configuration screen. The top navigation bar is identical to the previous screenshot. The main area has 'Fields & Relationships' selected in the sidebar, indicated by a red arrow. The configuration screen displays options for 'Data Type', with 'Lookup Relationship' selected. A detailed description of 'Lookup Relationship' is shown, stating it creates a relationship between the current object and another object. A red box highlights the 'Related to' dropdown, which is currently set to 'Room Booking'. The 'Next' button is visible at the top right.

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

The image consists of two screenshots of the Salesforce Object Manager interface. Both screenshots show the 'New Relationship' wizard.

Screenshot 1: Step 2. Choose the related object

- The 'Related To' dropdown menu is open, showing various object names. The option 'Room Booking' is highlighted with a red box and has a red arrow pointing to it from the left.
- The top right corner of the window shows 'Step 2'.

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

- The 'Field Label' input field contains 'Room Booking' and has a red box and a red arrow pointing to it from the left.
- The 'Field Name' input field contains 'Room_Booking' and has a red box and a red arrow pointing to it from the left.
- The 'Child Relationship Name' input field contains 'Payments1' and has a red box and a red arrow pointing to it from the left.
- The bottom right corner of the window shows 'Step 3 of 6'.

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.

3. Creation of another fields for the Payment1 object

To create fields in an object:

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

Payment Authorization	PaymentAuthorization	Standard Object
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object
Payment Gateway	PaymentGateway	Standard Object
Payment Group	PaymentGroup	Standard Object
Payment Line Invoice	PaymentLineInvoice	Standard Object
Payment1	Payment1_c	Custom Object
Price Book	Pricebook2	Standard Object
Prior Book Entry	PricebookEntry	Standard Object
Problem	Problem	Standard Object
Problem Related Item	ProblemRelatedItem	Standard Object
Process Exception	ProcessException	Standard Object
Product	Product2	Standard Object

2. Now click on "Fields & Relationships" > New

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

3. Select Data Type as a "Picklist"

The screenshots illustrate the configuration of a custom object 'Payment1' in Salesforce. In the first screenshot, under the 'Fields & Relationships' tab, a 'Picklist' field is being defined. In the second screenshot, the specific configuration for the 'Payment_Mode' picklist field is shown, listing various payment methods.

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:

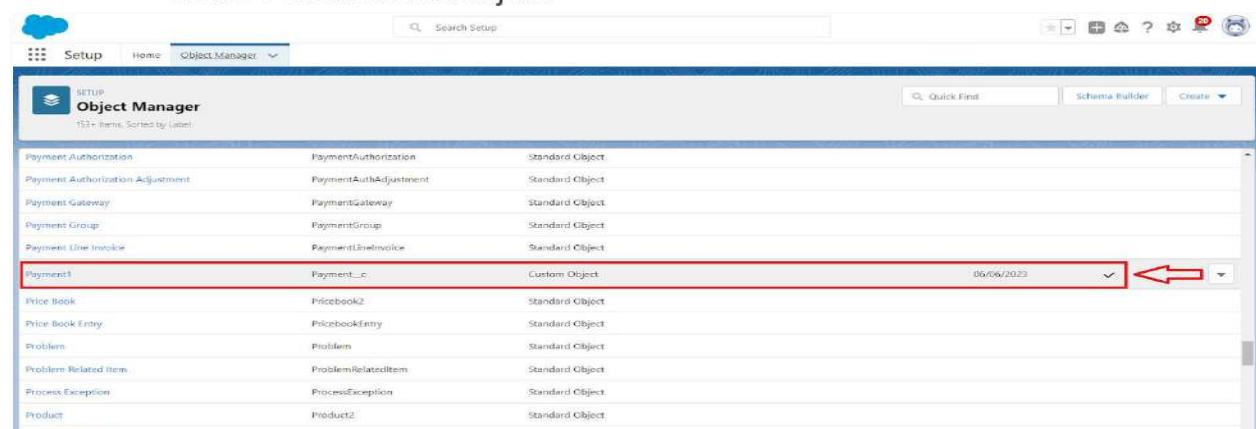
In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

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

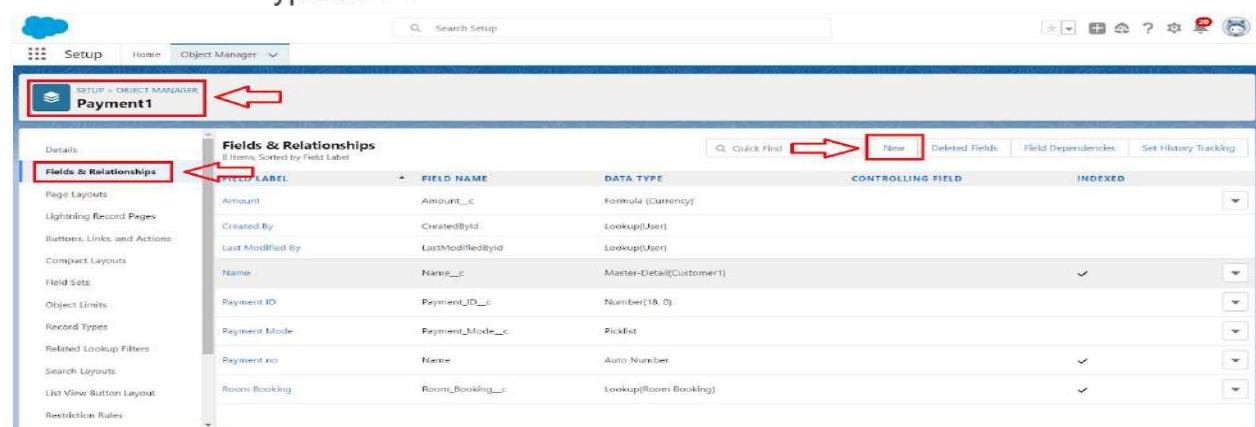
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar labeled 'Search Setup'. Below the header, there's a toolbar with icons for 'Quick Find', 'Schema Builder', and 'Create'. The main area displays a list of objects with their labels, API names, and object types. The 'Payment1' object is highlighted with a red box and has its creation date, '06/06/2023', displayed in a dropdown menu with a red arrow pointing to it.

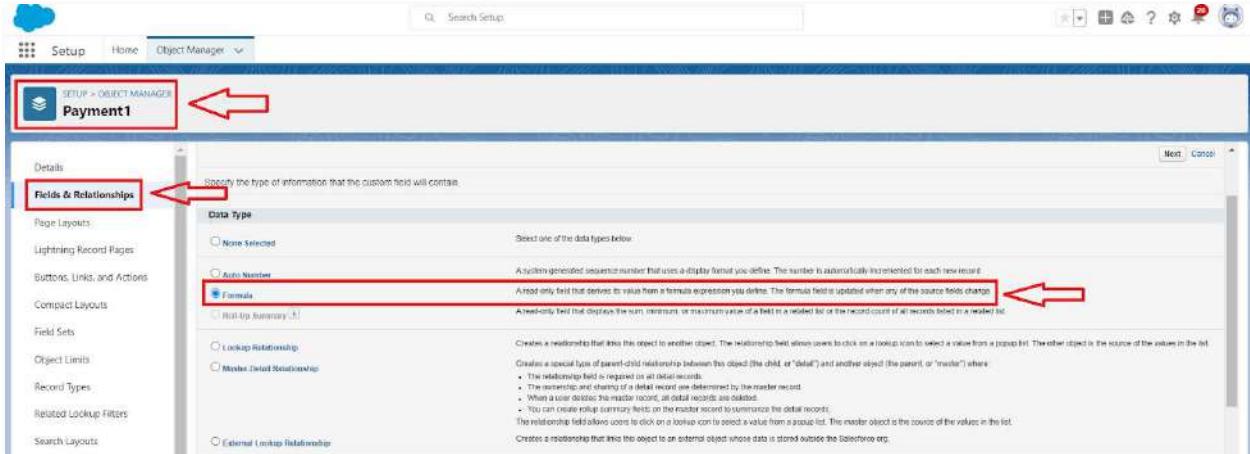
2. Now click on "Fields & Relationships" > New

3. Select Data Type as a "Formula"

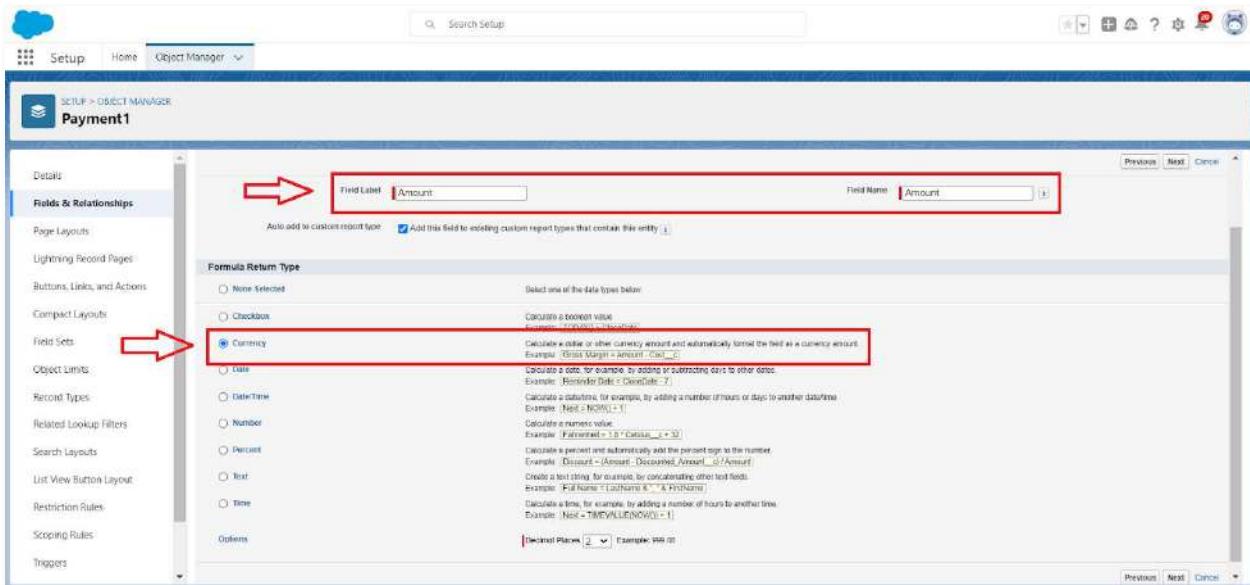


The screenshot shows the 'Fields & Relationships' page for the 'Payment1' object. At the top left, there's a breadcrumb path 'SETUP > OBJECT MANAGER > Payment1' with a red arrow pointing to 'Payment1'. Below the breadcrumb, there's a sidebar with various layout-related options like 'Page Layouts', 'Lightning Record Pages', etc., followed by a 'Fields & Relationships' section. The main area lists existing fields with columns for 'FIELD NAME', 'DATA TYPE', and 'CONTROLLING FIELD'. A red box highlights the 'New' button at the top right of the list area, and a red arrow points to it.

3. 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".

Step 3: Enter Formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula tab to use additional fields, operators, and functions.

Example: `(Last Month > Amount) / 12 = New Example`

Insert Field

Select a field then click Insert. Labels followed by a ">" indicate that there are more fields available.

Single Formula Advanced Formula

Payment1 > Room Booking__Amount_c

Organization > \$Profile > \$System > \$User > \$UserRole >

Last Modified Date > Name > Payment1 > Payment Mode > Payment Info > Record ID >

Created By ID > Created Date > Last Activity Date > Last Modified By > Last Modified By ID >

Amount

You selected:
Room Booking__Amount_c

Type Category API Name: Room Booking__Amount_c

Categories Functions

Insert

Step 4: Check Syntax

Check Syntax: No syntax errors in merge fields or variables. (Completed 4 out of 4 documents)

Description:

Help Text:

Blank Field Handling:

If your formula references any numbers, numerals, or date/time fields, specify what happens if the formula output yields these values as errors:

Treat blank fields as empty
 Treat blank fields as zero

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.

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' button in the top left. Another red box highlights the 'Food Selection' row in the list, which is also selected. A red arrow points from the 'Food Selection' row towards the bottom right corner of the screen.

Object Name	Object Label	Type	Last Modified	Action
Entitlement Contact	EntitlementContact	Standard Object		
Event	Event	Standard Object		
Feedback	Feedback_c	Custom Object	07/06/2023	
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object		
Finance Transaction	FinanceTransaction	Standard Object		
Food Selection	Food_Selection_c	Custom Object	05/06/2023	
Image	Image	Standard Object		
Incident	Incident	Standard Object		
Incident Related Item	IncidentRelatedItem	Standard Object		
Individual	Individual	Standard Object		
Invoice	Invoice	Standard Object		
Invoice Line	InvoiceLine	Standard Object		
Lead	Lead	Standard Object		

2. Now click on "Fields & Relationships" > New

The screenshot shows the 'Fields & Relationships' page for the 'Food Selection' object. A red box highlights the 'Food Selection' label in the top left. Another red box highlights the 'Fields & Relationships' link in the sidebar. A red arrow points from the 'New' button in the top right towards the bottom right corner of the screen.

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

3. Select Data Type as a "Master-detail Relationship"

4. Click on Next

Food Selection

Data Type

- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email

Select one of the data types below.

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

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

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

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

- The relationship field is required for all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.
- The relationship field always users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in this list.

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

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

Food Selection

New Relationship

Step 2. Choose the related object

Select the other object to which this object relates.

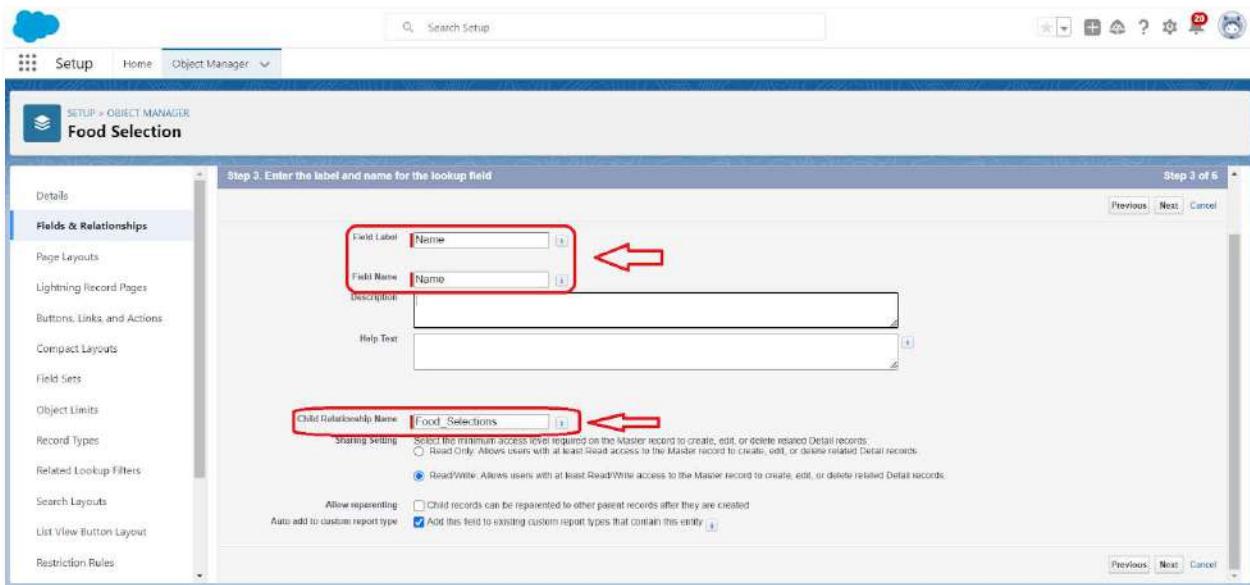
Related To:

- Change Request
- Change Request: Related Issue
- Change Request: Related Item
- Communication Subscription
- Communication Subscription: Channel Type
- Communication Subscription: Consent
- Communication Subscription: Timing
- Contact
- Contact Point: Consent
- Contact Point Type: Consent
- Content Folder
- Contract
- Contract Line Item
- Conversation
- Credential Stuffing Event Store
- Credit Memo
- Credit Memo: Invoice Application
- Credit Memo Line
- Customer
- D&B Company
- Document: Related Record
- None-

Help for this Page

Step 2 of 6

Previous Next Cancel



6. Fill the Above as following:

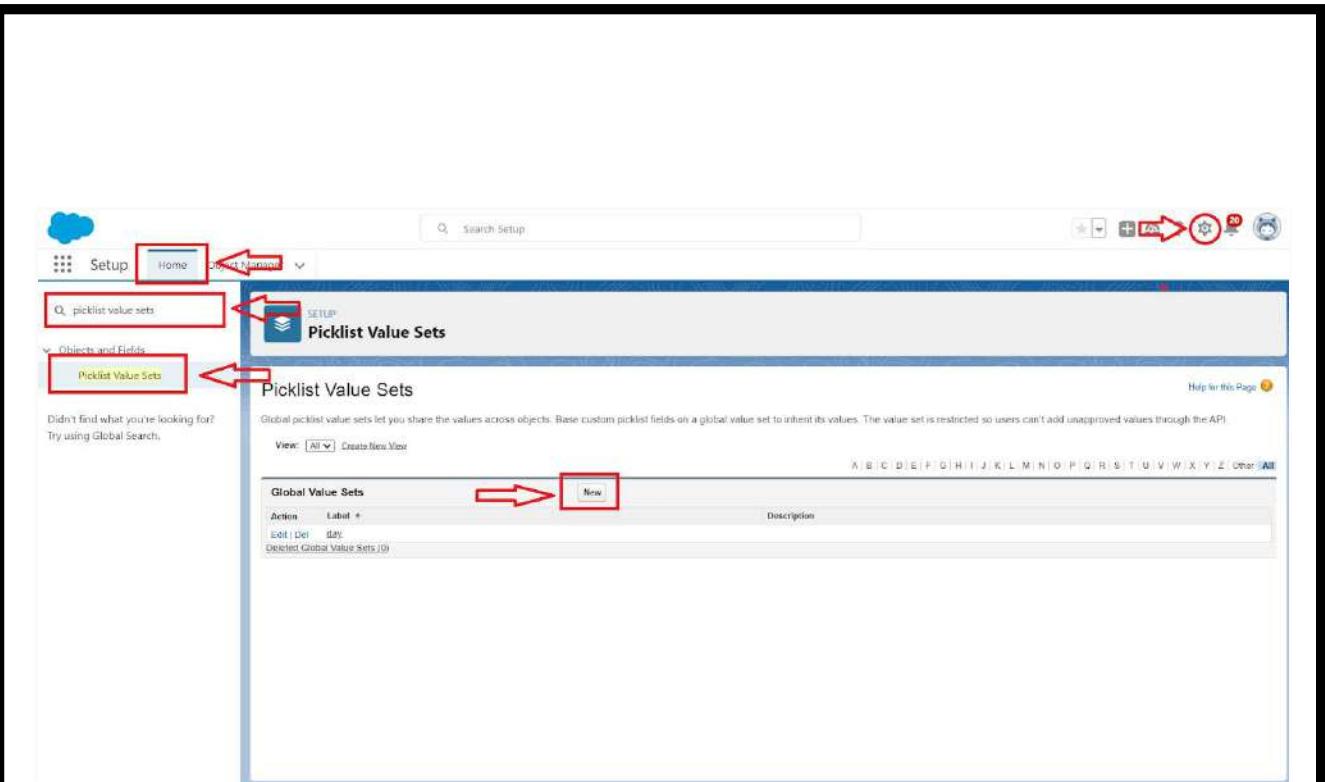
- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

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:

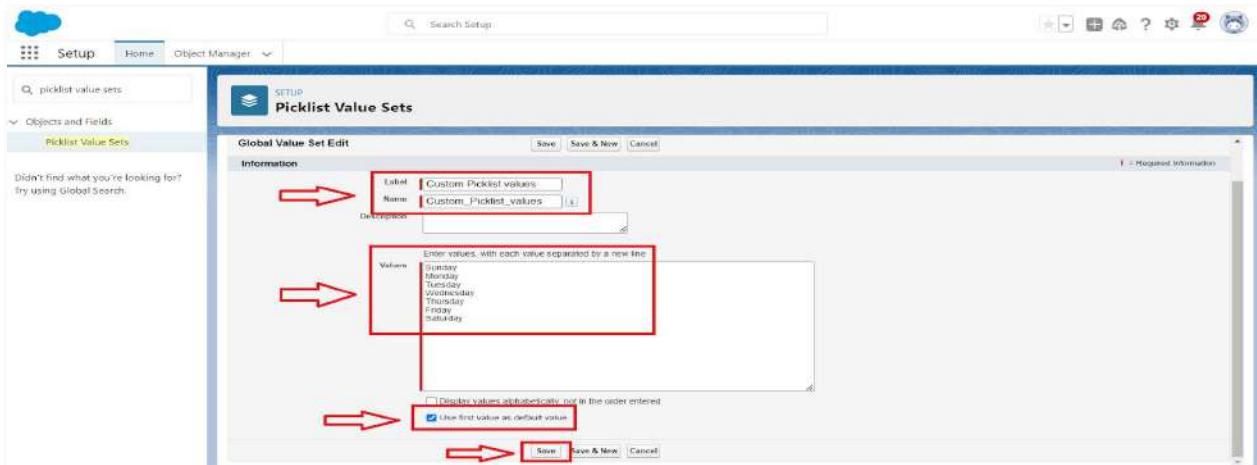
1. First click on gear icon and click on setup
2. Click on home tab in the Quick find box search for the " Picklist value sets "
3. Click on the Picklist value set and click on new



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.

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.

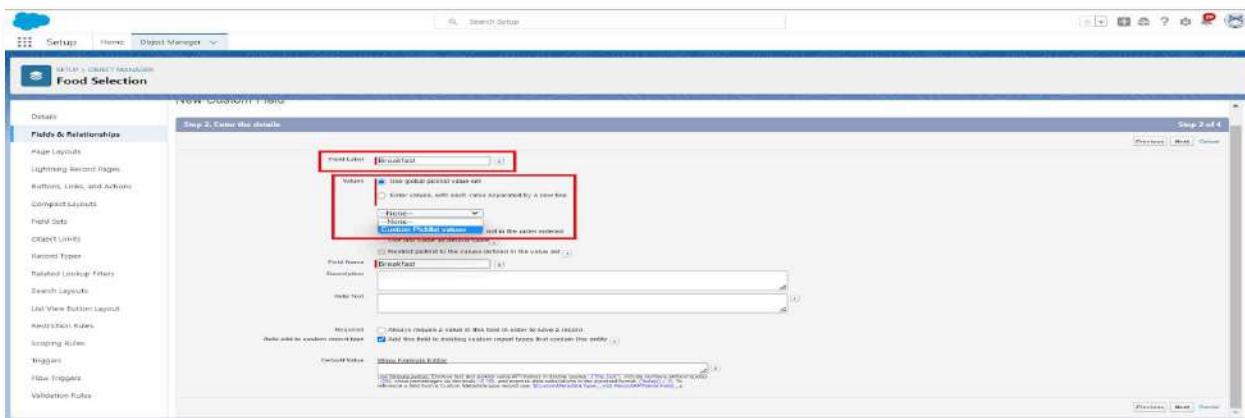
Object Name	Object Type	Object Status	Last Modified
Entitlement Contact	EntitlementContact	Standard Object	
Event	Event	Standard Object	
Feedback	Feedback_c	Custom Object	07/06/2023
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object	
Finance Transaction	FinanceTransaction	Standard Object	
Food selection	Food.Selection..c	Custom Object	05/06/2023
Image	Image	Standard Object	
Incident	Incident	Standard Object	
Incident Related Item	IncidentRelatedItem	Standard Object	
Individual	Individual	Standard Object	
Invoice	Invoice	Standard Object	
Invoice Line	InvoiceLine	Standard Object	
Lead	Lead	Standard Object	

2. Now click on "Fields & Relationships" > New

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

3. Select Data Type as a "Picklist"

FIELD TYPE	DESCRIPTION
Currency	Allows users to enter a value of their currency, along with a currency symbol. The value is automatically converted. This can be used to export data to Excel or another spreadsheet.
Date	Allows users to enter a date or pick a date from a calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a calendar. When users click a date in the pop-up, the date and the current time are inserted into this Date/Time field.
Email	Allows users to enter an email address, which is validated for proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define any location, including latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Type Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Type Area (Rich)	Allows users to enter formatted text, with images and links. Up to 131,072 characters on separate lines.
Type (Encrypted)	Allows users to enter any combination of letters, numbers and symbols and store them in encrypted form.
Time	Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:00:000' are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.



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 a another picklist Field for Food selection object

To create fields in an object :

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

Object	Label	Type	Last Modified
Entitlement Contact	EntitlementContact	Standard Object	
Event	Event	Standard Object	
Feedback	Feedback__c	Custom Object	07/06/2023
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object	
Finance Transaction	FinanceTransaction	Standard Object	
Food Selection	Food_Selection__c	Custom Object	05/06/2023
Image	Image	Standard Object	
Incident	Incident	Standard Object	
Incident Related Item	IncidentRelatedItem	Standard Object	
Individual	Individual	Standard Object	
Invoice	Invoice	Standard Object	
Invoice Line	InvoiceLine	Standard Object	
Lead	Lead	Standard Object	

1. Now click on "Fields & Relationships" > New

Food Selection

Fields & Relationships

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

2. Select Data Type as a "Picklist"

Food Selection

Fields & Relationships

Picklist

Allows users to enter a date or time. If the field contains time information, the field is a datetime field. You can also use this field to input data in ISO or UTC format.

Allows users to enter a date or pick a date from a pop-up calendar.

Allows users to enter a date or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into this Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email Note that custom email addresses cannot be used for mass emails.

Allows users to define locations, including latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number.

Allows users to enter a percentage number, for example, '1%' and automatically adds the percent sign to the number.

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

Allows users to select a value from a list you define.

Food Selection

Select Breakfast

Values

New Global Picklist Value

Enter values with width indicated by a max size.

Select_Breakfast

Show Formula Editor

3 .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.

Object Manager

Object Name	Object Label	Type	Created Date
Entitlement Contact	EntitlementContact	Standard Object	
Event	Event	Standard Object	
Feedback	Feedback__c	Custom Object	
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object	07/06/2023
Financer Transaction	FinanceTransaction	Standard Object	
Food Selection	Food_Selection__c	Custom Object	05/06/2023
Image	Image	Standard Object	
Incident	Incident	Standard Object	
Incident Related Item	IncidentRelatedItem	Standard Object	
Individual	Individual	Standard Object	
Invoice	Invoice	Standard Object	
Invoice Line	InvoiceLine	Standard Object	
Lead	Lead	Standard Object	

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

Food Selection

Fields & Relationships

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

3. Now Click on New Option

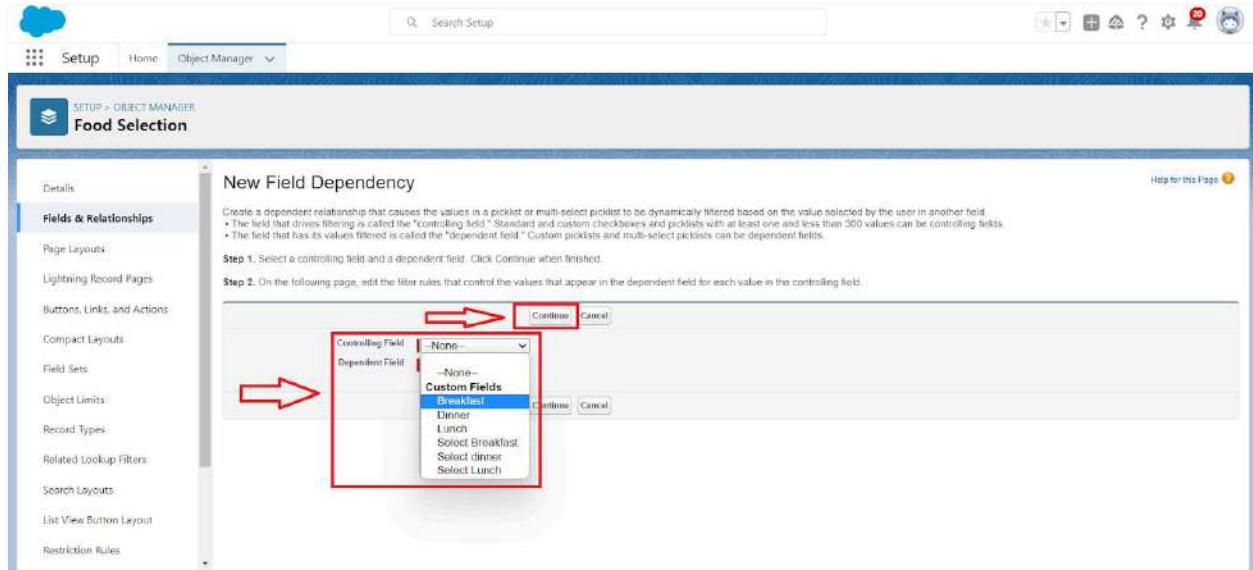
Food Selection

Food Selection Field Dependencies

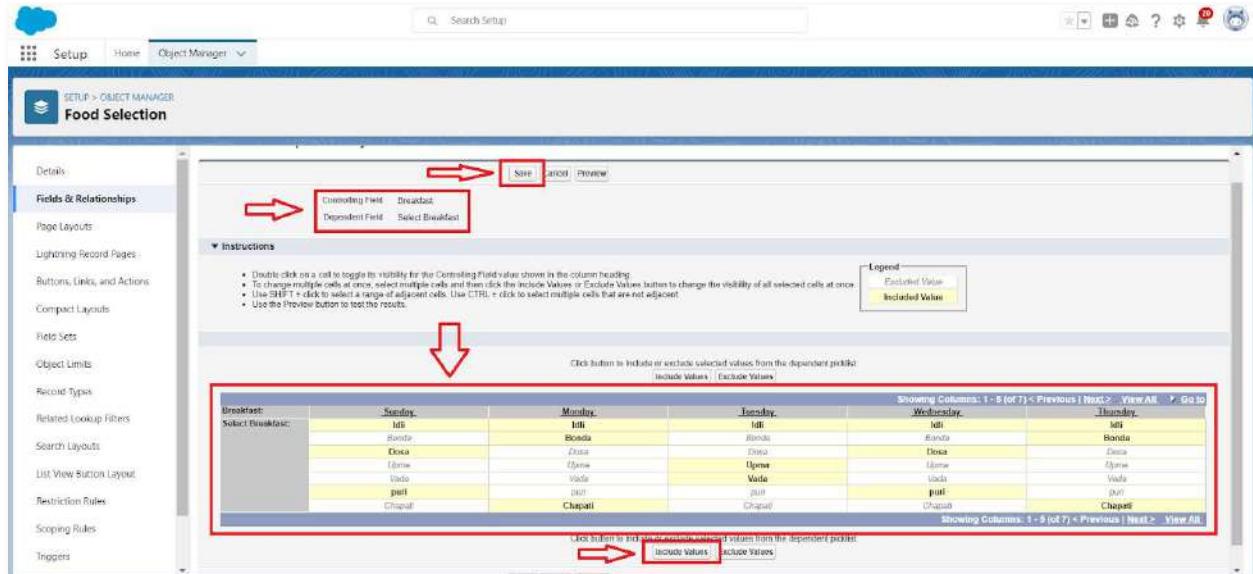
New

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Breakfast	Select_Breakfast	Vteera Venkata Venkateswara Androthu, 07/06/2023, 3:45 pm
Edit Del	Dinner	Select_dinner	Vteera Venkata Venkateswara Androthu, 07/06/2023, 3:55 pm
Edit Del	Lunch	Select_Lunch	Vteera Venkata Venkateswara Androthu, 07/06/2023, 3:56 pm

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.



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

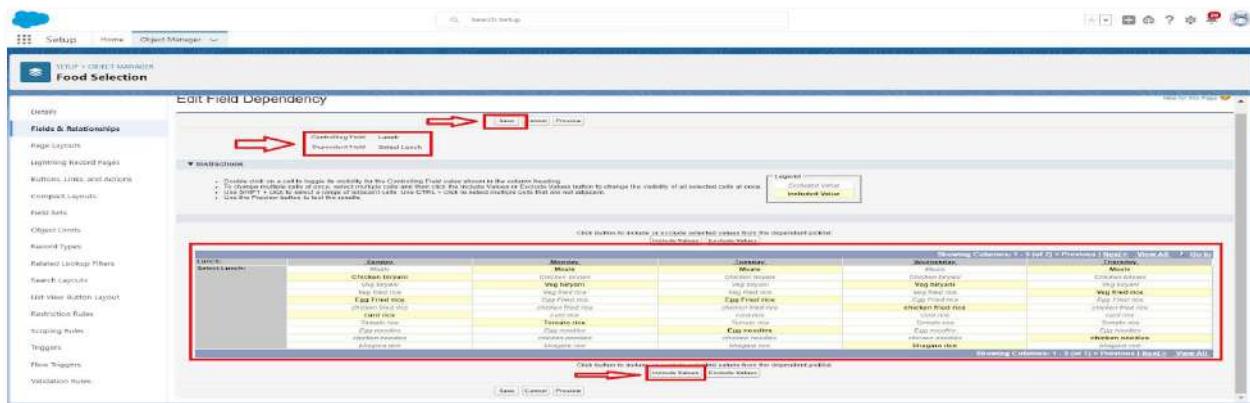
3. Select Data Type as a "Picklist"
4. Fill the Above as following:
 - Field Label: Lunch
 - Under Value - Select the Use global picklist value set
 - Under the drop down select the Custom Picklist Values
 - Select required
 - Click on Next > Next > Save and new.

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.

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

Select Checkbox Use First value as default Value

Click on Next > Next > Save and new.

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.

Edit Field Dependency

Instructions:

- Ctrl+click on a cell to toggle its visibility for the Controlling Field's value shown in the column header.
- To select multiple cells, select multiple cells and then click the **Include Values** button to change the visibility of all selected cells at once.
- Use SHIFT+click to select a range of adjacent cells. Use CTRL+click to select multiple cells that are not adjacent.
- Use the Previous button to find the results.

Legend: **Included Value** **Excluded Value**

Day	Sunday	Monday	Tuesday	Wednesday	Thursday
Select item					
Chicken wings	Chores	Meat	Chicken wings	Chores	Meat
Veg Spring	Veg	Spring	Veg fried rice	Veg	Spring
Veg Fried rice	Egg Fried rice				
chicken fried rice					
curry rice					
Egg noodles					
chicken noodles					
shrimp rice					

Showing Columns: 1–5 of 7 | [Previous](#) [Next](#) [View All](#)

Save | Cancel | Preview

Activity-5: Creation of fields for the Feedback object

1. create fields & relationship to an object:

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

Object Manager

103+ items. Sorted by Label

Engagement Channel Type	EngagementChannelType	Standard Object
Engagement Channel Work Type	EngagementChannelWorkType	Standard Object
Entitlement	Entitlement	Standard Object
Entitlement Contact	EntitlementContact	Standard Object
Event	Event	Standard Object
Feedback	Feedback_c	Custom Object
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object
Finance Transaction	FinanceTransaction	Standard Object
Food Selection	Food_Selection__c	Custom Object
Image	Image	Standard Object
Incident	Incident	Standard Object
Incident Related Item	IncidentRelatedItem	Standard Object
Individual	Individual	Standard Object

07/06/2023

<https://thermarbridge.2cd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015a000032c52/FieldsAndRelationships>

2. Now click on "Fields & Relationships" > New

Setup > Object Manager
Feedback

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback No.	Name	Auto Number		
Food	Food__c	Picklist		
Housecleaning	Housecleaning__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer1)		
Owner	OwnerId	Lookup(User/Group)		
Suggestion	Suggestion__c	Text Area(255)		

3. Select Data Type as a "Lookup Relationship"

4. Click on Next

Setup > Object Manager
Feedback

Fields & Relationships

Data Type

- None Selected
- Auto Number
- Formula
- Lookup Relationship
- Master Detail Relationship
- External Lookup Relationship
- Checkbox

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

Setup > Object Manager
Feedback

Fields & Relationships

New Relationship

Step 2. Choose the related object

Select the other object to which this object relates:

Related To: Customer1

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.

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

Details

Fields & Relationships

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers

Step 3 of 6

Field Label: Name **Field Name:** Name

Child Relationship Name: Feedbacks1

What do you want to do if the lookup record is deleted?
 Always require a valid lookup record to save a record.
 Clear the value of this field. You can't choose this option if you make this field required.
 Don't allow deletion of the lookup record that's part of a lookup relationship.
 Auto add to custom report type
 Add this field to existing custom report types that contain this entry [\(1\)](#)

Lookup Filter:
Optional: Create a filter to limit the records available to users in the lookup field. [Edit me now](#)

[Show Filter Settings](#)

[Previous](#) [Next](#) [Cancel](#)

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.

SETUP

Object Manager 103+ items. Sorted by Label

EngagementChannelType EngagementChannelWorkType Standard Object

EngagementChannelWorkType EngagementChannelWorkType Standard Object

Entitlement Entitlement Standard Object

EntitlementContact EntitlementContact Standard Object

Event Event Standard Object

Feedback Feedback_c Custom Object 07/06/2023

FinanceBalanceSnapshot FinanceBalanceSnapshot Standard Object

FinanceTransaction FinanceTransaction Standard Object

FoodSelection Food_Selection_c Custom Object 05/06/2023

Image Image Standard Object

Incident Incident Standard Object

IncidentRelatedItem IncidentRelatedItem Standard Object

Individual Individual Standard Object

<https://themarbridge-2d6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01s4000003Gz2/FieldsAndRelationships/view>

2. Now click on "Fields & Relationships" > New

SETUP > OBJECT MANAGER: Feedback

Fields & Relationships

9 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback No.	Name	Auto Number		
Food	Food__c	Picklist		
Housecleaning	Housecleaning__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer)		
Owner	OwnerId	Lookup(User Group)		
Suggestion	Suggestion__c	Text Area(255)		

3. Select Data Type as a “Picklist”

SETUP > OBJECT MANAGER: Feedback

Fields & Relationships

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

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Allows users to enter a date or pick a date from a pop-up calendar.
Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Allows users to enter any number. Leading zeros are removed.
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Allows users to enter any phone number. Automatically formats it as a phone number.
Allows users to select a value from a list you define.
Allows users to select multiple values from a list you define.
Allows users to enter any combination of letters and numbers.
Allows users to enter up to 255 characters on separate lines.
Allows users to enter up to 131,072 characters on separate lines.
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Allows users to enter a local time. For example, "2:44 PM", "14:44", and "14:44:59 EDT" are all valid times for this field.
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

4. Click on Next

SETUP > OBJECT MANAGER: Feedback

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

Field Label: Housecleaning

Values:
Housecleaning

Field Name: Housecleaning

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

Allow this field in existing custom report types that contain this entry:

Default Value: Main Picklist Filter

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 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.



The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'SETUP', 'Home', and 'Object Manager'. Below the navigation bar, the title 'Object Manager' is displayed with a red box and a red arrow pointing to it. The main area lists various objects: Shift Work Topic, Skill Requirement, Social Persona, Store, Task, Time Slot, Total Room, User, User Provisioning Request, Voice Call, Waitlist, and Waitlist Participant. The 'Total Room' object is highlighted with a red box and a red arrow pointing to its row. The 'Total Room' object has the field 'Total_Rooms_c' and is categorized as a 'Custom Object'. The status bar at the bottom right shows the date '27/06/2023'.

2. Now click on “Fields & Relationships” > New

Setup > Object Manager

Total Room

Fields & Relationships 1

Fields & Relationships

Fields & Relationships 2

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
count	count_c	Roll-Up Summary (COUNT Room Booking)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		

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

Setup > Object Manager

Total Room

Fields & Relationships

Step 1. Choose the Field type

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

Data Type

None Selected

Auto Number

Formula 3

Roll-up Summary

Lookup Relationship

Master-Detail Relationship

Step 1

Next **Cancel**

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

Setup > Object Manager

Total Room

Fields & Relationships

Field Label 4

Field Name 4

Formula Return Type

None Selected

Checkbox

Currency

Date

Date/Time

Number 5

Percent

Text

Time

Options

Decimal Places 6

Example 599

Previous **Next** **Cancel**

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

The screenshot shows the 'Advanced Formula' editor interface. At the top, there are tabs for 'Simple Formula' and 'Advanced Formula'. Below the tabs, there's an input field containing the formula '30 - Rooms_Booked__c'. To the right of the input field is an 'Insert Operator' dropdown menu. Further to the right is a 'Functions' panel titled 'All Function Categories' which lists various mathematical and logical functions like ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. At the bottom of the editor, there's a 'Check Syntax' button with the message 'No syntax errors in merge fields or functions. (Compiled size: 36 characters)' and a red box around it. A red arrow labeled '7' points to the formula input field. A red arrow labeled '8' points to the 'Check Syntax' button.

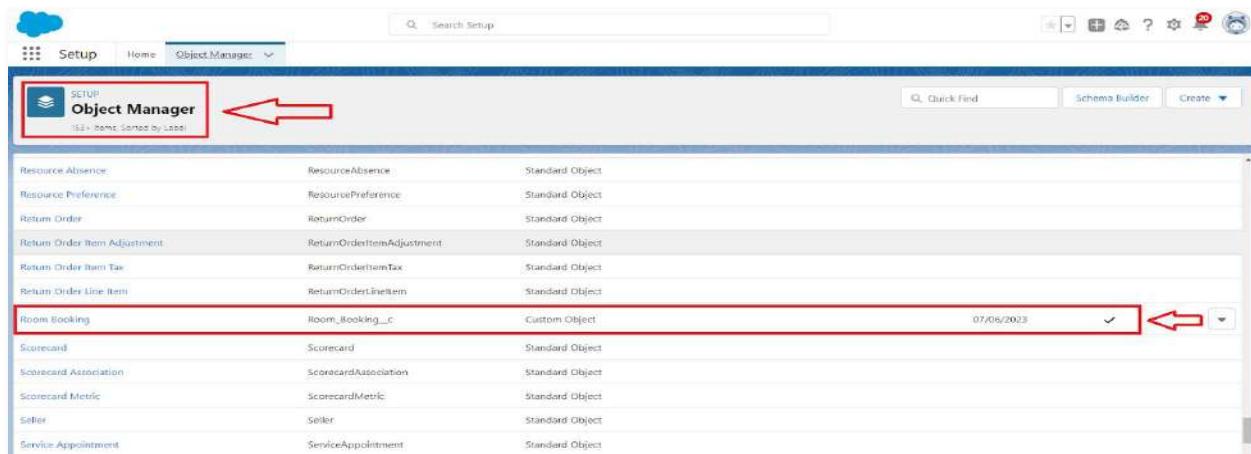
10. Click on Next > Next > Save and new.

Task-6:Validation rule

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.



- Now click on "Validation rule" at top > New.

The screenshot shows the Salesforce Object Manager interface for the 'Room Booking' object. In the center, there is a table titled 'Validation Rules' with one item listed: 'checkbox_field' with an error message 'checkbox should be checked'. The 'ACTIVE' column has a checked checkbox. The 'MODIFIED BY' column shows 'Veera Venkata Varaprasad Androthu' with a timestamp '05/05/2023, 7:30 pm'. On the left sidebar, there are several tabs: 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', and 'Buttons, Links, and Actions'. The 'Validation Rules' tab is currently selected. A red arrow points to the 'Validation Rules' header, and another red arrow points to the 'New' button in the top right corner of the main content area.

- Enter Rule name "checkbox field" and make the validation should be Active.
- Enter the formula in the formula Box "Advance_payment_for_1month_c = false" and check for syntax error.
- Enter the error message "Checkbox should be checked"
- Select error location as field(Advance payment for 1month)

The screenshot shows the 'Validation Rule Edit' screen for the 'checkbox_field' rule. The 'Rule Name' is set to 'checkbox_field'. The 'Formula' field contains the formula 'Advance_payment_for_1month_c = false'. The 'Insert Field' dropdown is set to 'checkbox_field' and the 'Insert Operator' is set to '='. The 'Error Message' field contains the message 'checkbox should be checked'. A red arrow points to the 'Rule Name' input field, another to the 'Formula' input field, and a third to the 'Error Message' input field.

- Click on save.

Activity-2:create a Another validation rule to an Room Booking Object

- Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
- Now click on "Validation rule" at top > New.
- Enter Rule name "check in rule" and make the validation should be Active.
- Enter the formula in the formula Box " Check_in_c = False " and check for syntax error.
- Enter the error message "Check box should be checked"

6. Select error location as field(Check in)

The screenshot shows the 'Error Condition Formula' configuration screen. The 'Rule Name' is set to 'check_in_rule' (1). The 'Active' checkbox is checked. The 'Error Condition Formula' section contains the formula 'Check_in__c = False' (2), with 'Insert Field' and 'Insert Operator' buttons. A dropdown menu for 'Functions' lists various options like ABS, COS, and DATE. The 'Error Message' section has an example 'Discount percent cannot exceed 30%' and a message box containing 'Check box should be checked' (3). The 'Error Location' section shows 'Field' selected (4).

7. Click on save.

Task-7:Profile

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

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 defined by us.

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

Activity-1: To create a new profile:

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

The screenshot shows the Salesforce Setup interface. The top navigation bar has 'Setup' selected. Below it, a search bar contains 'profile'. The main content area is titled 'Profiles'. A sidebar on the left shows 'Users' and 'Profiles' (which is highlighted with a red box and has a red arrow pointing to it). The main list shows various profiles: 'Salesforce API Only System Integrator', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', 'Standard User' (which is highlighted with a red box and has a red arrow pointing to it), and 'System Administrator'. The 'User License' column indicates they are all 'Salesforce'.

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

The screenshot shows the 'Clone Profile' page. At the top, it says 'Enter the name of the new profile'. Below that, a message says 'You must select an existing profile to clone from.' The 'Existing Profile' dropdown is set to 'Standard User' and 'User license' is 'Salesforce'. The 'Profile Name' field contains 'Custom user' (with a red box and arrow). At the bottom, there are 'Save' and 'Cancel' buttons, with 'Save' being highlighted by a red box and arrow.

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.

The screenshot shows the 'Custom Object Permissions' section of the Salesforce Setup page. It displays two groups of objects with their respective permission settings:

	Basic Access	Create	Edit	Delete	View All	Data Administration
Customers	<input checked="" type="checkbox"/>					
Feedbacks	<input checked="" type="checkbox"/>					
Food Selections	<input checked="" type="checkbox"/>					

	Basic Access	Create	Edit	Delete	View All	Data Administration
Payments	<input checked="" type="checkbox"/>					
Room Bookings	<input checked="" type="checkbox"/>					
Total Rooms	<input checked="" type="checkbox"/>					

Session Settings and Password Policies sections are also visible at the bottom of the page.

5. Scroll down and Click on Save.

Activity-2: 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.

The screenshot shows the 'Custom Object Permissions' section of the Salesforce Setup page for a cloned profile. It displays two groups of objects with their respective permission settings:

	Basic Access	Create	Edit	Delete	View All	Data Administration
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Feedbacks	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Food Selections	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

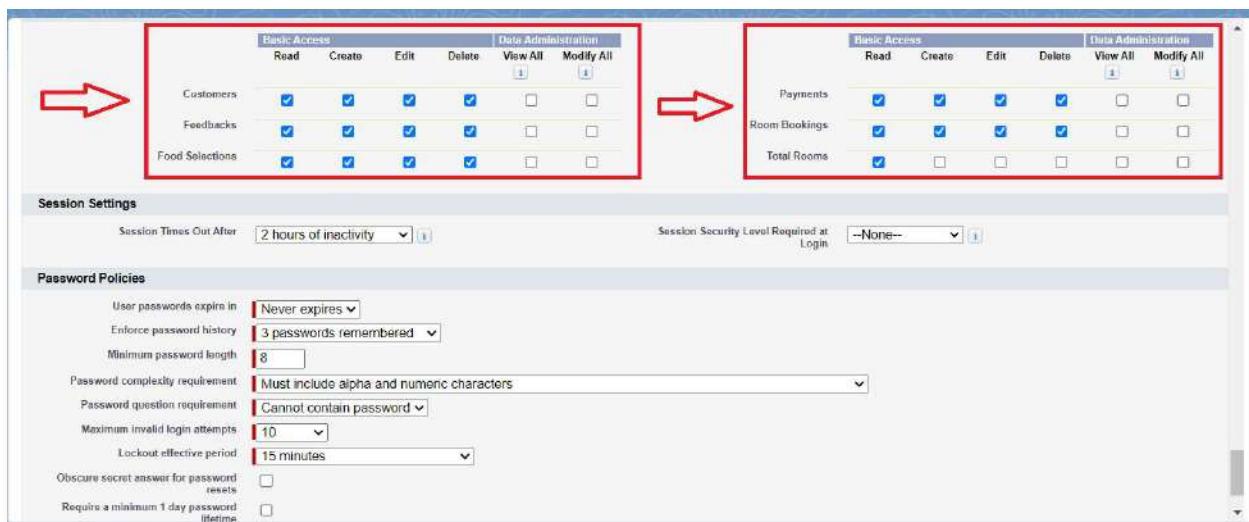
	Basic Access	Create	Edit	Delete	View All	Data Administration
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Room Bookings	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Total Rooms	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Session Settings and Password Policies sections are also visible at the bottom of the page.

5. Scroll down and Click on Save.

Activity-3: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.

Task-8:Roles

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

Activity-1:Marketing Role

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

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with a 'Setup' icon and a search bar. Under 'Users', the 'Roles' link is highlighted with a red box and an arrow. The main content area is titled 'Understanding Roles' and shows a sample role hierarchy. At the bottom right of this area, there's a 'Set Up Roles' button with a red box and an arrow pointing to it.

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

Your Organization's Role Hierarchy



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

The screenshot shows the 'Role Edit' page for a 'New Role'. It has a 'Role Edit' header and a 'Role Name' field containing 'Marketing'. Below it is a 'Label' field with the same value. There are other fields for 'This role reports to' (set to 'CEO') and 'Role Name as displayed on reports' (empty). At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

4. Then click on Save.

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.

The screenshot shows the 'Role Edit' page for creating a new role. The 'Label' field contains 'Receptionist' and the 'Role Name' field also contains 'Receptionist'. The 'This role reports to' field is set to 'CEO'. At the bottom right, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Save' button is highlighted with a red box and an arrow pointing to it.

4. Then click on Save.

Task-9: Users

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

Activity-1: Create User

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

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with various options like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Feature Settings'. The 'Users' link is highlighted with a red box and an arrow pointing to it. On the right, the main area is titled 'All Users' with a sub-header 'On this page you can create, view, and manage users.' Below this, there's a table with columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. At the top of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A red box highlights the 'New User' button.

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

The screenshot shows the 'User Edit' screen for a new user. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. Below this, the 'General Information' section contains fields for 'First Name' (sandeep), 'Last Name' (gujja), 'Alias' (sgujj), 'Email' (sandeep@gmail.com), 'Username' (sandeep@sunny.com), and 'Nickname' (sunny). A red box and arrow highlight this entire section. To the right, there's a large list of user profile settings. A second red box and arrow highlight the 'Role' dropdown, which is set to 'CEO'. Other visible settings include 'User License' (Salesforce), 'Profile' (Custom user), and 'Active' (checked). There are also sections for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Data.com User Type' (None), 'Data.com Monthly Addition Limit' (Default Limit (300)), 'Accessibility Mode (Classic Only)', and 'Mobile Contract Balance on Device'.

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

The screenshot shows the 'User Edit' page for a user named 'abhilash garapati'. The 'General Information' section is highlighted with a red box, containing fields for First Name ('Abhilash'), Last Name ('garapati'), Alias ('agara'), Email ('abhi@gmail.com'), Username ('gabhi@tech.com'), and Nickname ('abhi'). To the right of this section is another red box highlighting the 'Role' field set to 'Marketing', the 'User License' dropdown set to 'Salesforce Platform', and the 'Profile' dropdown set to 'Customer Platform user1'. The 'Save' button at the top right of the edit screen is also highlighted with a red arrow.

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

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with various settings like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The 'User Management Settings' section is expanded, showing 'Users' which is currently selected. The main area is titled 'SETUP Users' and shows a 'New User' form. The 'General Information' section contains fields for First Name (Ganesh), Last Name (gelli), Alias (ggell), Email (ganesh@gmail.com), Username (ganesh@tech.com), and Nickname (gan). The 'Role' field is set to 'Receptionist'. Other sections like 'Marketing User', 'Offline User', and 'Service Cloud User' are listed below. A red arrow points from the 'First Name' field to the 'General Information' section, another from the 'Role' field to its dropdown, and a third from the 'Save' button at the top right.

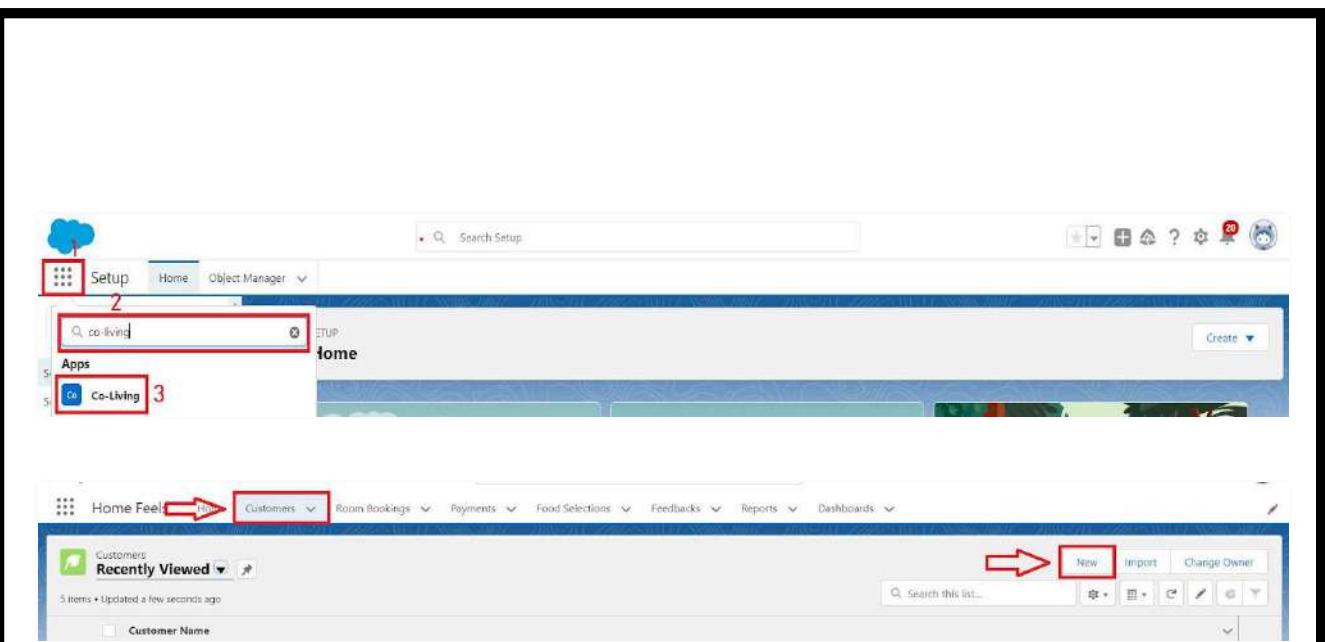
3. Save

Task-10:User Adoption

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.

The screenshot shows the 'New Customer1' form. At the top, it says 'New Customer1' and has a note '* = Required Information'. Below that is a section titled 'Information' with a red box around it. Inside this section, there are four input fields: 'Customer Name' (text: 'Text'), 'Phone no' (text: '9702874232'), 'Email id' (text: 'tech@gmail.com'), and 'Owner' (dropdown: 'Veera Venkata Varaprasad Androthu'). To the right of these fields is another section with 'Permanent Address' (text: 'Hyderabad') and 'current Status' (dropdown: 'Employee'). A large red arrow points down from the 'Information' section to the bottom of the form. At the bottom, there are three buttons: 'Cancel', 'Save & New', and a large blue 'Save' button highlighted by a red box. A red arrow points to the right of the 'Save' button.

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.

The screenshot shows the Co-Living application interface. At the top, there is a navigation bar with links for Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. A red box highlights the 'Customers' tab. Below the navigation bar is a search bar labeled 'Search...' and a toolbar with various icons. The main area displays a list of recently viewed customers under the heading 'Recently Viewed'. A red box highlights the name 'sandeep' in the list. The details for 'sandeep' are shown in a modal window. The modal has tabs for 'Related' and 'Details'. The 'Details' tab is selected and highlighted with a red border. Inside the modal, there are two columns of information. The left column includes fields for Customer Name (sandeep), Phone no (970526532), Email id (sandeep@gmail.com), Created By (Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm), and Last Modified By (Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm). The right column includes fields for Owner (Veera Venkata Varaprasad Androthu), Permanent Address (Hyderabad), current Status (Employee), and Last Modified By (Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm).

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 Co-Living application interface, similar to the previous one but with a different view. It features a navigation bar with links for Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. A red box highlights the 'Customers' tab. Below the navigation bar is a search bar labeled 'Search...' and a toolbar with various icons. The main area displays a list of recently viewed customers under the heading 'Recently Viewed'. A red box highlights the name 'sandeep' in the list. To the right of the list, there is a red box containing the number '3' with a downward arrow, indicating a dropdown menu. At the bottom right of the list, there is a red box containing the number '4' next to a red-bordered 'Delete' button.

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.

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with tabs like Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is currently selected), and Dashboards. Below the navigation bar, there's a sidebar with categories: Reports, Recent (3 items), Created by Me, Private Reports, Public Reports, and All Reports. The main area displays a table of reports under the 'Recent' category. The columns in the table are: Report Name, Description, Folder, Created By, Created On, and Subscribed. There are three reports listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
Room booking report		custom report	Veera Venkata Varaprasad Androthu	14/6/2023, 2:58 pm	
Room booking report		Private Reports	Veera Venkata Varaprasad Androthu	7/6/2023, 4:53 pm	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	5/6/2023, 10:09 am	

At the top right of the main area, there's a search bar labeled 'Search recent reports...' and a red box highlighting the 'New Report' button. A red number '2' is positioned above the table, and a red number '3' is positioned above the search bar.

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.

Create Report

Category	Select a Report Type
Recently Used	<input type="text" value="customers"/> 2
All 1	
Accounts & Contacts	Activities with Customers
Opportunities	Customers 3
Customer Support Reports	Customers with Room Bookings and Total Rooms
Leads	Customers with Payments
Campaigns	Customers with Payments and Room Booking
Activities	Customers with Food Selections
Contracts and Orders	Total Rooms with Room Bookings and Customers
Price Books, Products and Assets	Customers with Room Bookings with Total Rooms
	Customers with Room Bookings with Payments

4. Customize your report

5. Add fields from left pane as shown below

The screenshot shows a Microsoft Power BI report titled "Room booking report" under the heading "Customers with Room Bookings with Payments".

Outline Sidebar:

- Groups:** A dropdown menu showing "GROUP ROWS" and "Add group...".
- Customer Name:** A search input field.
- Group Columns:** A dropdown menu showing "Add group...".
- Columns:** A list of columns: Room No., Phone no., Email Id, Permanent Address, current Status, Room sharing, Advance payment for 1month, AC - 3000, and Amount.

Table Data:

Customer Name	Room No.	Phone no.	Email Id	Permanent Address	current Status	Room sharing	Advance payment for 1month	AC - 3000	Amount
Subtotal	RN-005	7300776536	ab1@gmail.com	Chennai	Employee	single sharing - 14000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	126,000
Ganesh	RN-005	656825423	gmesh@gmail.com	Tatipuru	Student	Triple sharing - 10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	126,000
Subtotal	RN-001	6434724362	varaprasadreddu@gmail.com	Tatipuru	Employee	single sharing - 14000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	126,000
Subtotal	Subtotal	Subtotal	Subtotal	Subtotal	Subtotal	Subtotal	Subtotal	Subtotal	Subtotal
Subtotal	RN-007	9705265532	sandeep@gmail.com	Hyderabad	Employee	Triple sharing - 10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	126,000
RN-005	9705265532	sandeep@gmail.com	Hyderabad	Employee	Double sharing - 12000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	126,000	
Subtotal	RN-004	870587262	sunish@gmail.com	Kothapuram	Employee	Double sharing - 12000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	126,000
Subtotal									126,000
Total									126,000

Bottom Navigation:

- Row Count: 10
- Detail Rows:
- Subtotals:
- Grand Total:

Buttons:

- Send (highlighted with a red box)
- Close
- Run

Status Bar:

- Update Preview Automatically

6. Save or run it.

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

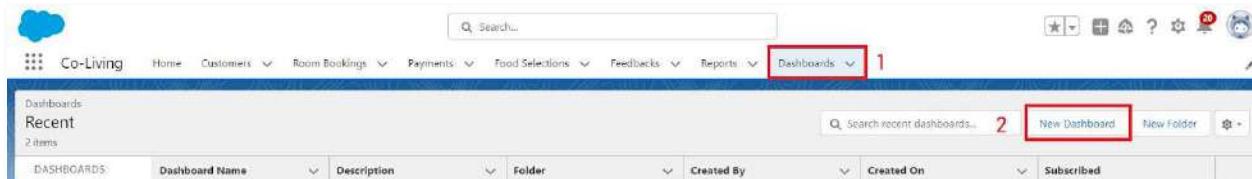
5. Add fields from left pane as shown Above
6. Save or run it.

Task-12:Dashboards

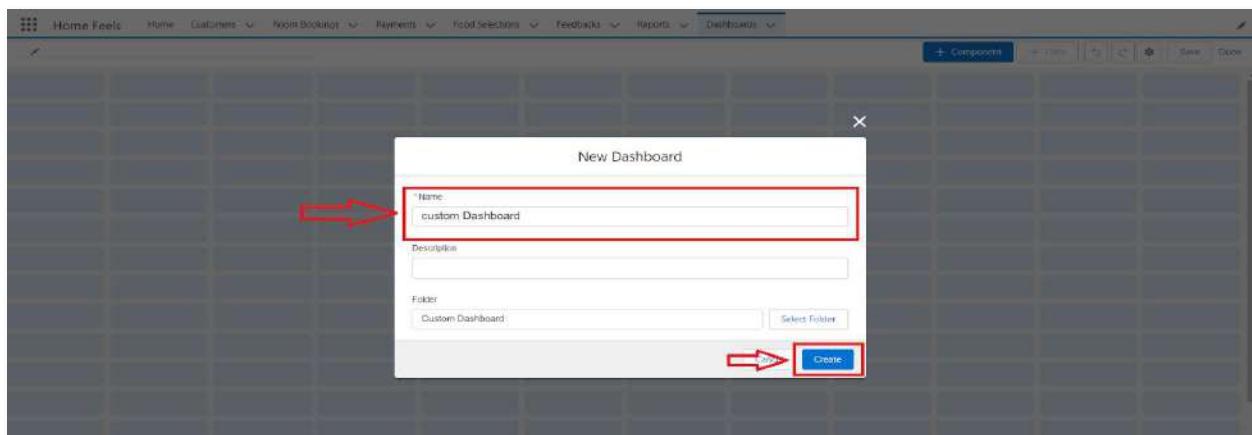
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

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.

Select Report

Reports

Recent

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

Folders

- Created by Me
- Shared with Me
- All Folders

Selected Report: Room booking report
Veeta Venkata Varaprasad Androthu - 14-Jun-2023, 2:58 pm - custom report

Search Reports and Folders... Reports and Folders ▾

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

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

Select

Edit Component

Room booking report

Subtitle

Amount

Footer

Legend Position

Right

Component Theme

Light (Dashboard default)

Dark

Preview

Room booking report

Amount

Sum of Amount: ₹156k

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

View Report (Room booking report)

Cancel Update

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

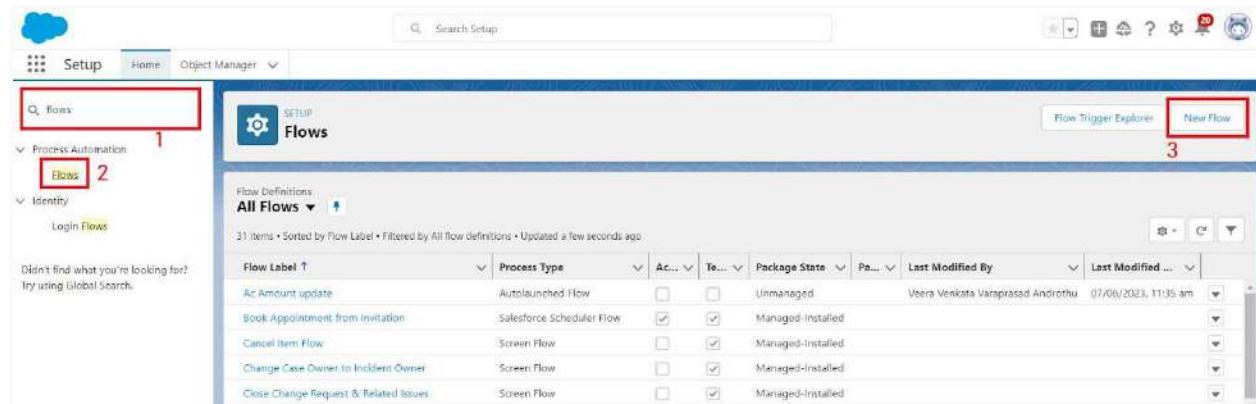
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

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.

New Flow

Core All + Templates

Screen Flow Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.	Record-Triggered Flow Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
Schedule-Triggered Flow Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.	Platform Event—Triggered Flow Launches when a platform event message is received. This autolaunched flow runs in the background.
Autolaunched Flow (No Trigger) Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.	Record-Triggered Orchestration Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

1

2 Create

- Select the Object as a Room Booking in the Drop down list.
- Select the Trigger Flow when: "A record is Created or Updated".
- Select the Optimize the flow for: "Actions and Related Records" and Click on Done.

Configure Start

Select Object

Object: Room Booking

1

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated**
- A record is deleted

2

Set Entry Conditions

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

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

Condition Requirements: None

* Optimize the Flow for:

Fast Field Updates Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.	Actions and Related Records Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.
--	--

3

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

4

Cancel Done

- 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.

New Decision	
Label Field Should be Update	* API Name Field_Should_be_Update
Description 1	
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.	
OUTCOME ORDER 4	OUTCOME DETAILS 2 * Label Single Sharing * Outcome API Name Single_Sharing
Condition Requirements to Execute Outcome All Conditions Are Met (AND) 3 Resource \$Record > Room sharing Operator Equals Value single sharing AND \$Record > AC - 3000 Operator Equals Value False	
+ Add Condition Cancel Done	

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.

OUTCOME ORDER 1 + 3

OUTCOME DETAILS 1

*Label: Triple Sharing *Outcome API Name: Triple_Sharing

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: \$Record > Room sharing Operator: Equals Value: Triple sharing

Resource: AND \$Record > AC - 3000 Operator: Equals Value: False

Default Outcome: Single Sharing

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.

OUTCOME ORDER 1 + 3

OUTCOME DETAILS 1

*Label: Single Ac *Outcome API Name: Single_Ac

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: \$Record > Room sharing Operator: Equals Value: single sharing

Resource: AND \$Record > AC - 3000 Operator: Equals Value: !ISGlobalConstant,True

Default Outcome: Single Ac

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.

OUTCOME ORDER 1 + OUTCOME DETAILS 1

*Label: Double Ac *Outcome API Name: Double_Ac

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: \$Record > Room sharing Operator: Equals Value: Double sharing

AND Resource: \$Record > AC - 3000 Operator: Equals Value: (\$GlobalConstant.True)

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.

New Decision

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER 1 + OUTCOME DETAILS 1

*Label: Triple Ac *Outcome API Name: Triple_Ac

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: \$Record > Room sharing Operator: Equals Value: Triple sharing

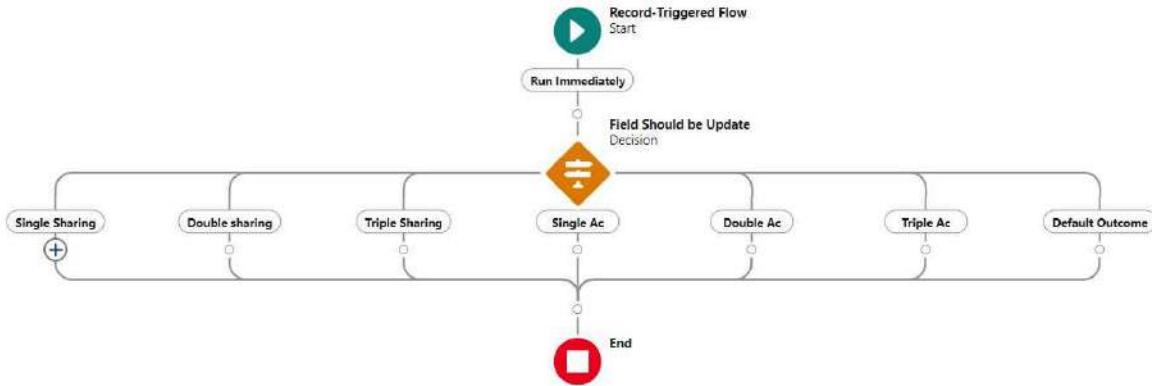
AND Resource: \$Record > AC - 3000 Operator: Equals Value: True

+ Add Condition

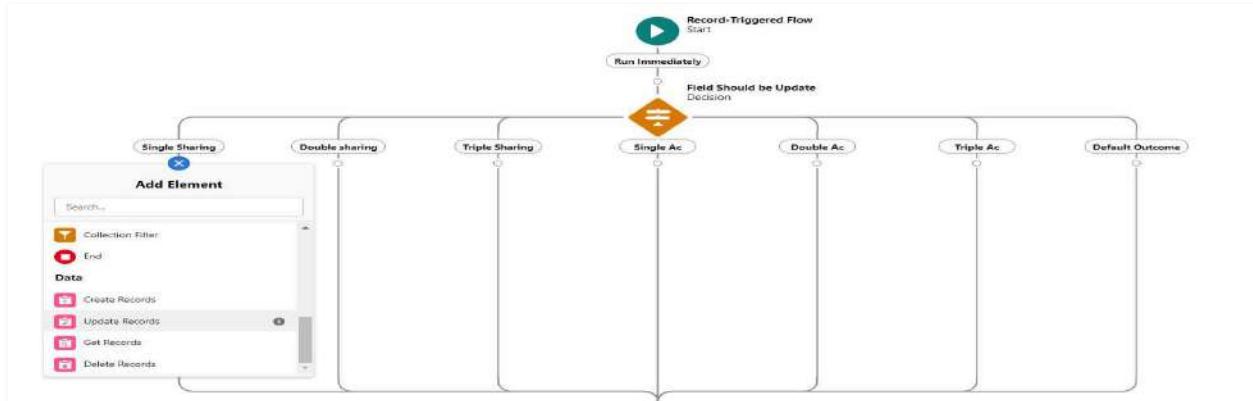
When to Execute Outcome ①

If the condition requirements are met
 Only if the record that triggered the flow to run is updated to meet the condition requirements

Cancel Done 3



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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label single	* API Name single
Description	

How to Find Records to Update and Set Their Values

- Use the room booking record that triggered the flow
- Update records related to the room booking record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

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

Set Filter Conditions

Condition Requirements to Update Record:

- None—Always Update Record

Set Field Values for the Room Booking Record

Field Amount__c	Value 28000
--------------------	----------------

Cancel **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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label Double	* API Name Double
Description	

How to Find Records to Update and Set Their Values

- Use the room booking record that triggered the flow
- Update records related to the room booking record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

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

Set Filter Conditions

Condition Requirements to Update Record:

- None—Always Update Record

Set Field Values for the Room Booking Record

Field Amount__c	Value 24000
--------------------	----------------

Cancel **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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label: * API Name:

Description:

* How to Find Records to Update and Set Their Values:
 Use the room booking record that triggered the flow
 Update records related to the room booking record that triggered the flow
 Use the IDs and all field values from a record or record collection
 Specify conditions to identify records, and set fields individually

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

Set Filter Conditions
Condition Requirements to Update Record:

Set Field Values for the Room Booking Record

Field	Value
Amount_c	20000

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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label single_ac1	* API Name single_ac1
Description	

How to Find Records to Update and Set Their Values

- Use the room booking record that triggered the flow.
- Update records related to the room booking record that triggered the flow.
- Use the IDs and all field values from a record or record collection.
- Specify conditions to identify records, and set fields individually.

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

Set Filter Conditions

Condition Requirements to Update Record
None—Always Update Record

Set Field Values for the Room Booking Record

Field Amount_c	Value 34000
-------------------	----------------

Add Field

Cancel **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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label Double_ac1	* API Name Double_ac1
Description	

How to Find Records to Update and Set Their Values

- Use the room booking record that triggered the flow.
- Update records related to the room booking record that triggered the flow.
- Use the IDs and all field values from a record or record collection.
- Specify conditions to identify records, and set fields individually.

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

Set Filter Conditions

Condition Requirements to Update Record
None—Always Update Record

Set Field Values for the Room Booking Record

Field Amount_c	Value 30000
-------------------	----------------

Add Field

Cancel **Done**

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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label: **Triple_ac1** * API Name: **Triple_ac1**

Description:

How to Find Records to Update and Set Their Values

(Use the room booking record that triggered the flow.
 Update records related to the room booking record that triggered the flow.
 Use the IDs and all field values from a record or record collection
 Specify conditions to identify records, and set fields individually

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

Set Filter Conditions

Condition Requirements to Update Record: **None—Always Update Record**

Set Field Values for the Room Booking Record

Field: Amount_c	Value: 26000
Add Field	

Cancel **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.

Save the flow

* Flow Label
Update Amount Field

* Flow API Name
Update_Amount_Field

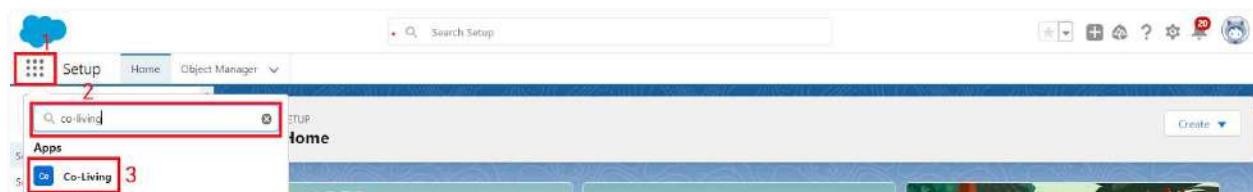
Description

Show Advanced

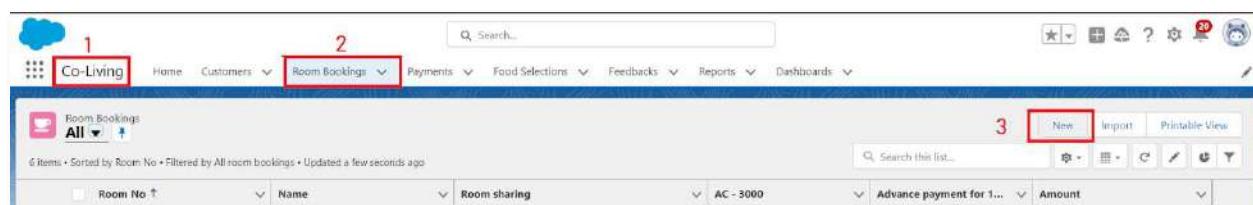
Cancel **Save**

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.

New Room Booking

* = Required Information

Information

Room No	AC - 3000 <input checked="" type="checkbox"/>
* Name	Prasad <input checked="" type="checkbox"/>
* Room sharing	Double sharing - 12000
Amount	

Cancel Save & New **Save**

Co-Living Home Customers Room Bookings Payments Food Selections Feedbacks Reports Dashboards

Room Booking
RN-008

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

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