

A CRM Application To Manage The Booking Of Co-Living

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PROJECT ABSTRACT:

The Co-living space project aims to create a vibrant and inclusive community where individuals can live, work, and connect with like-minded people. We believe that living together in a shared environment fosters collaboration, reduces isolation, and enhances the overall quality of life.

The co-living space will feature a carefully designed layout that balances privacy and communal areas. Co-living Space is an application where customer Details is stored in order to choose the different AC rooms with Multiple Sharing. Special foods items will be selected by the user in Daily and make Payments in different modes. And Also give the feedback of the service like Room cleaning, internet connection and foods etc...

INDEX

<u>Title Name</u>	<u>Page no</u>
A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING	1
PROJECT ABSTRACT	2
<u>TASK</u>	
1.Salesforce	4- 7
2.Object	8 - 12
3.Tab	13 - 16
4.The Lightning App	17 - 18
5.Fields & Relationships	19 - 62
6.Validation rule	63 - 64
7.Profile	65 - 69
8.Roles	70 - 71
9.Users	72 - 75
10.User Adoption	76 - 78
11.Reports	79 - 80
12.Dashboards	81 - 82
13.Flows	83- 97

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.

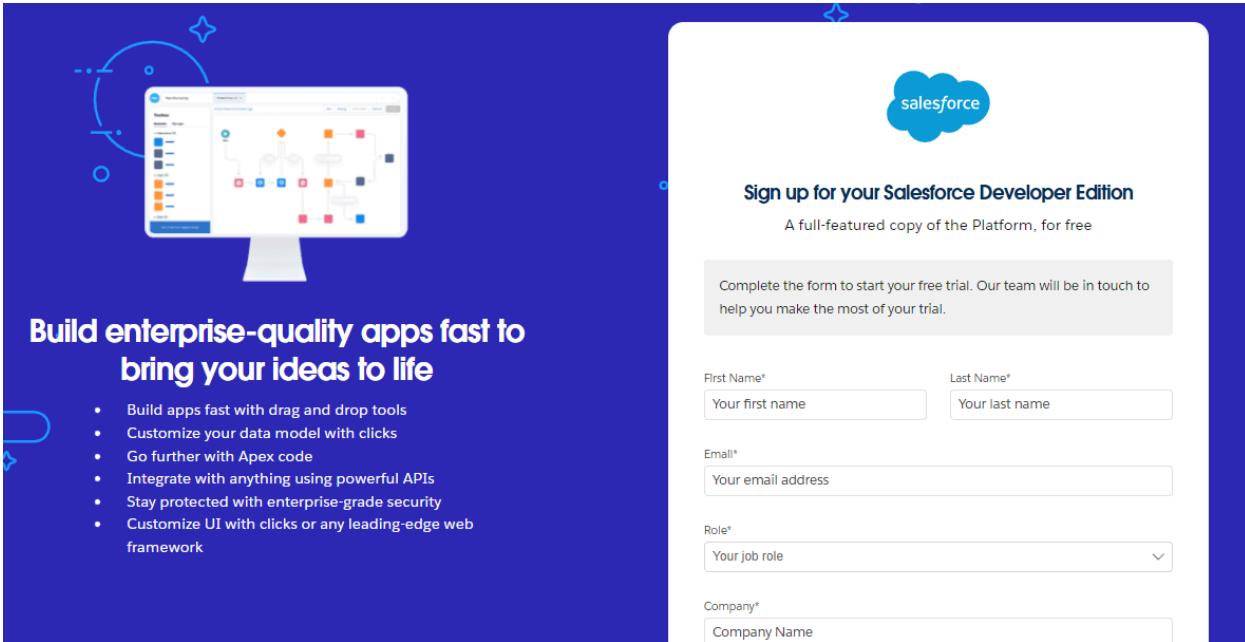
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

Activity 1- Creating Developer Account

Creating a developer org in salesforce.

- ★ Go to <https://developer.salesforce.com/signup>
- ★ On the sign up form, enter the following details



Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

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 :

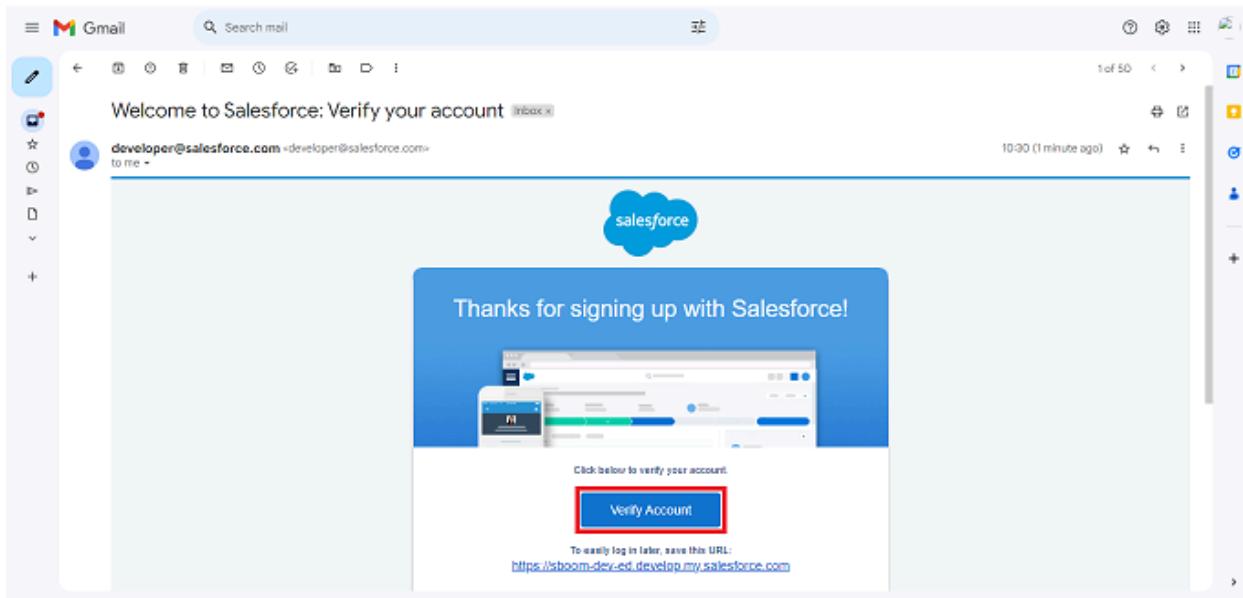
username@organization.com

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

The screenshot shows the 'Change Your Password' page in the Salesforce interface. At the top, it says 'Enter a new password for lead@sb.com'. Below that, it lists requirements: 'Make sure to include at least: 8 characters, 1 letter, 1 number'. A red box highlights the password input fields. The first field is labeled '* New Password' and contains '.....' with a status 'Good'. The second field is labeled '* Confirm New Password' and contains '.....' with a status 'Match'. Below these are 'Security Question' and 'Answer' fields. The 'Answer' field contains 'asdfghjkl'. At the bottom is a large blue 'Change Password' button.

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

The screenshot shows the 'Setup Home' page in the Salesforce interface. The left sidebar includes links like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION > Users'. The main area is titled 'SETUP Home' and features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Each card has a 'Get Started' or 'Learn More' button. A 'Create' button is located in the top right corner of the main area.

Task 2 - Object

What Is an Object?

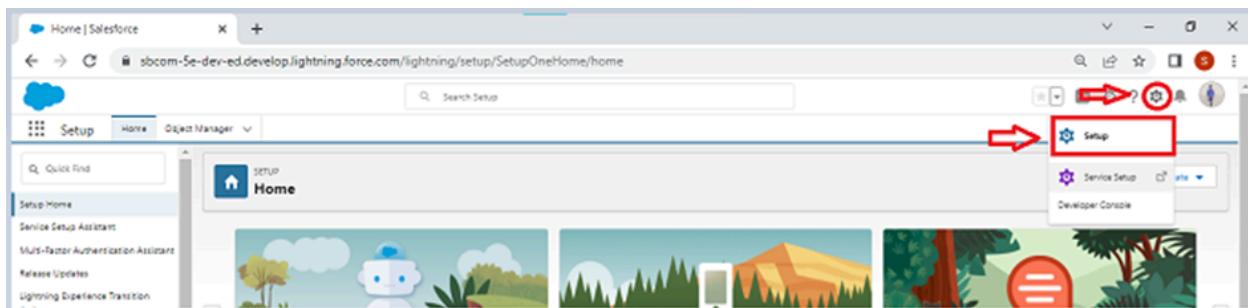
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are 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:

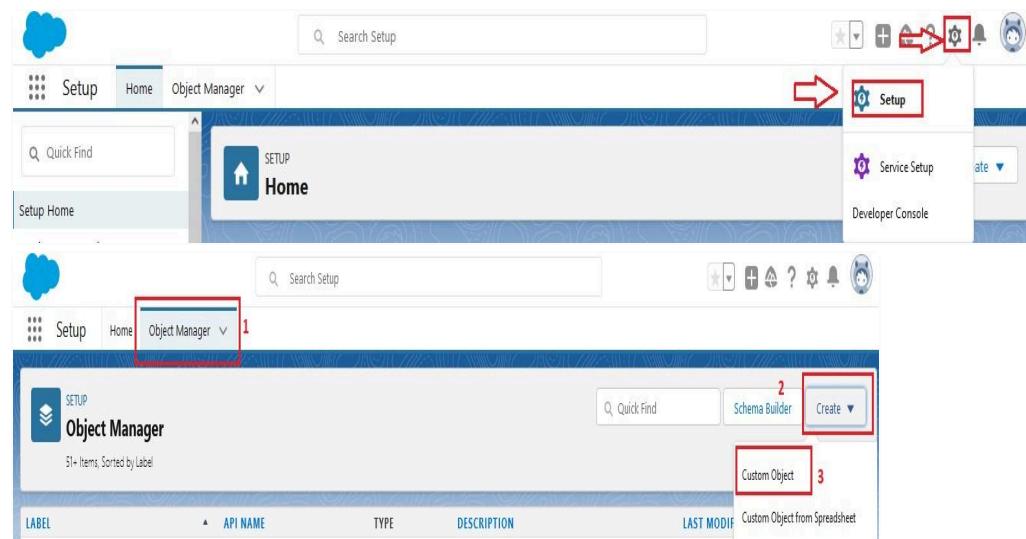


Activity1 - Create a custom object for Total Rooms

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 'Custom Object Definition Edit' screen in the Salesforce Setup. The 'Custom Object Information' section includes fields for 'Label' (Total Room) and 'Plural Label' (Total Rooms), both highlighted with red boxes and labeled 1. Below these is the 'Object Name' field (Total_Rooms) labeled 2. The 'Enter Record Name Label and Format' section contains the 'Record Name' field (Total_No_of_Rooms) labeled 3. In the 'Optional Features' section, the 'Allow Reports' checkbox is checked and highlighted with a red circle and arrow 4. In the 'Search Status' section, the 'Allow Search' checkbox is checked and highlighted with a red circle and arrow 5. At the bottom, there are three buttons: 'Save' (highlighted with a red box and arrow 6), '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 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 " 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.
- 14.

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

To create a Tab:(Total Rooms)

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. In the search bar, 'Tabs' has been typed. The 'Custom Tabs' section is visible, showing a list of existing tabs. At the top right of this list, there is a 'New' button, which is highlighted with a red box.

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

The screenshot shows the 'New Custom Object Tab' setup screen. In the 'Object' dropdown, 'Total Room' is selected. A red arrow points from this dropdown to a separate 'Tab Style Selector' window, which is displayed as a modal. This window contains a grid of icons representing different tab styles, such as 'Airplane', 'Bell', 'Books', etc., each with a corresponding name below it.

3. Next (Add to profiles page) keep it as default

SETUP Tabs

Gold Partner User	Default On ▾
High Volume Customer Portal	Default On ▾
High Volume Customer Portal User	Default On ▾
Identity User	Default On ▾
Marketing User	Default On ▾
Minimum Access - Salesforce	Default On ▾
Partner App Subscription User	Default On ▾
Partner Community Login User	Default On ▾
Partner Community User	Default On ▾
Read Only	Default On ▾
Salesforce API Only System Integrations	Default On ▾
Silver Partner User	Default On ▾
Solution Manager	Default On ▾
Standard Platform User	Default On ▾
Standard User	Default On ▾
System Administrator	Default On ▾

Previous Next Cancel

4. Next (Add to Custom App) keep it as default & Save.

SETUP Tabs

Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Co-Living (CoLiving)	<input checked="" type="checkbox"/>

Append tab to users' existing personal customizations

Previous Save Cancel

Activity 2 - Create A Tab For Customers

To create a Tab:(Customers)

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

- object tab)
2. Select Object(Customers) > Select the tab style > Next (Add to profiles page) keep it as default > Next (Add to Custom App) keep it as default > Save.

Activity 3 - To Create A Tab For Room Bookings

To create a Tab:(Room Bookings)

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

Activity 4 - Create A Tabs For Remaining Objects

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

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

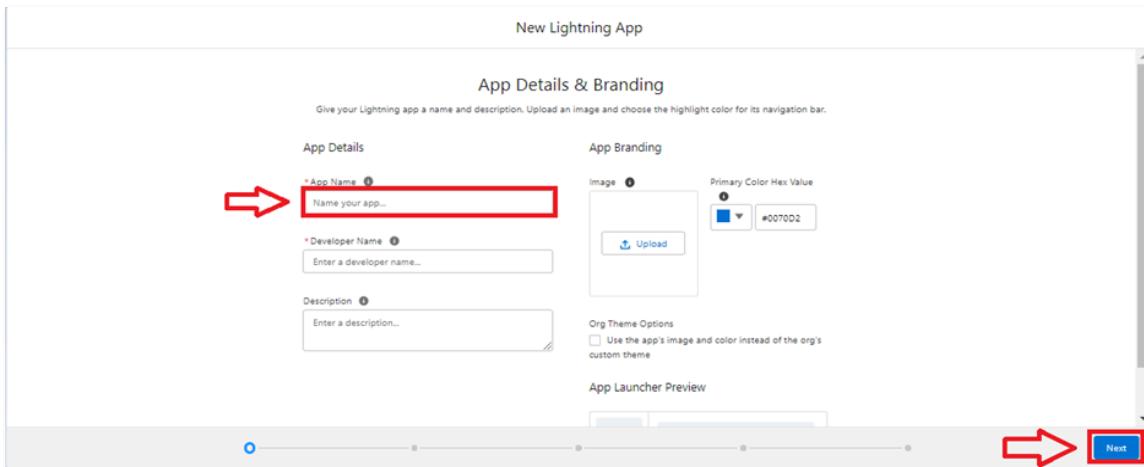
To create a lightning app page:

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

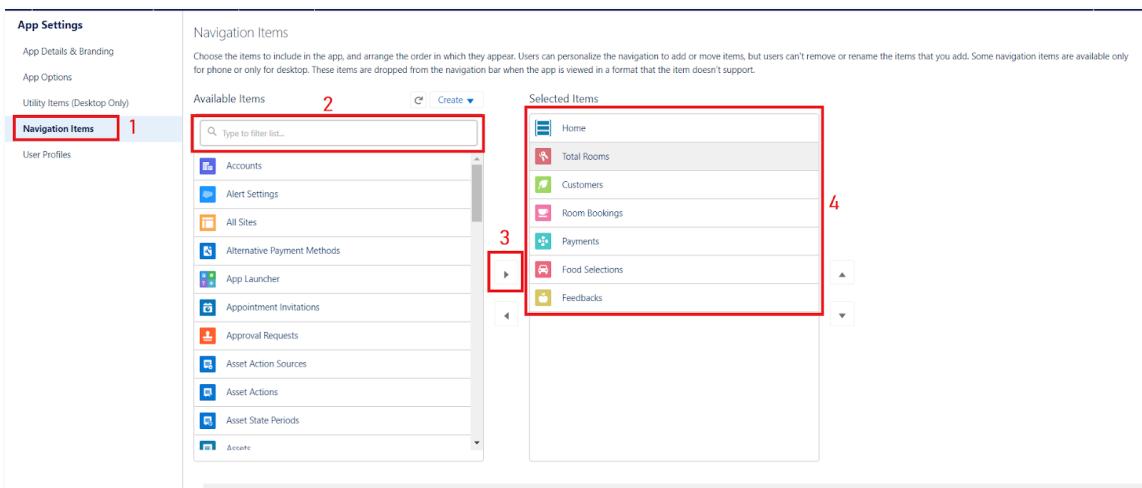
The screenshot shows the Salesforce Lightning Experience App Manager interface. At the top, there's a search bar and a 'New Lightning App' button highlighted with a red box. Below the search bar, there are tabs for 'App Manager' (highlighted with a red box), 'App Types', and 'Clone Apps(Beta)'. A red arrow points to the 'Clone Apps(Beta)' tab. The main area displays a table of existing apps with columns for App Name, Developer Name, Description, Last Modified, App Type, and Version. The table lists 10 items, including All Tabs, Analytics Studio, App Launcher, and various Chatter and Data Manager apps.

App Name	Developer Name	Description	Last Modified	App Type	Ver.
All Tabs	AlTabster	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	
App Launcher	Applauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	
Bar Solutions	LightningBar	Discover and manage business solutions designed for your industry.	04/12/2022, 10:18 am	Lightning	
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	29/12/2022, 4:04 pm	Connected (Managed)	
Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fe...	29/12/2022, 4:05 pm	Connected (Managed)	
College Management System	Naiveen	demo app	08/12/2022, 4:16 pm	Lightning	
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning	

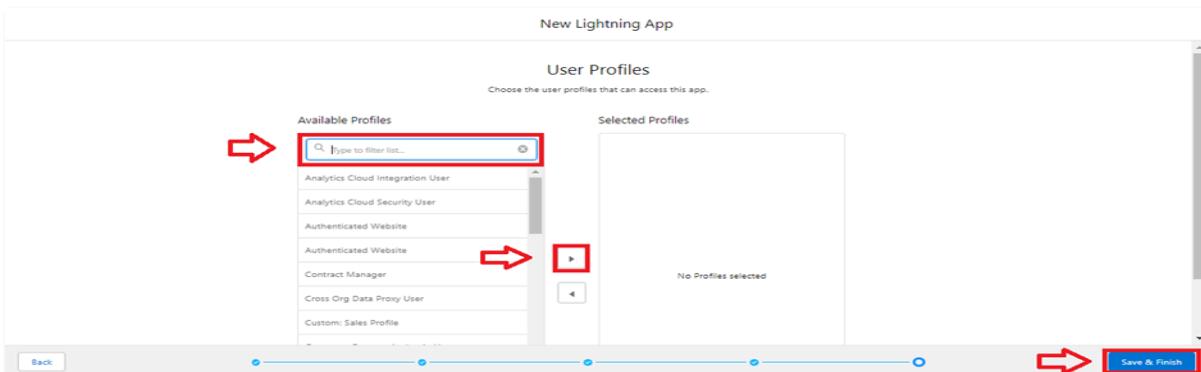
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.



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

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.

Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object
Credit Memo	CreditMemo	Standard Object
Credit Memo Invoice Application	CreditMemoInv/Application	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

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

3. Select Data Type as a “Phone”

4. Click on next

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.
- 4.

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.

Setup Home Object Manager

Object Manager 153+ 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

07/06/2023

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

Setup Home Object Manager

Object Manager Room Booking

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”

Setup Home Object Manager

Object Manager Room Booking

Fields & Relationships

Checkbox	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.
Currency	Allows users to enter a date or pick a date from a popup calendar.
Date	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes 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.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)	Allows users to enter any combination of letters and numbers 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 "14:40:50 600" 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. Click on Next

SETUP > OBJECT MANAGER
Room Booking

Step 2. Enter the details

Field Label: Room Sharing (1)

Values: Use global picklist value set
 Enter values, with each value separated by a new line
 Single sharing
 Double sharing
 Triple sharing (2)

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set (3)

Field Name: Room_Sharing (1)

Description:

Help Text:

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

Auto add to custom report type: Add this field to existing custom report types that contain this entry (1)

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: {The_Text}, include numbers without quotes (2), show percentages as decimals (3), and express date calculations in the standard format: {Today + 1}. To reference a field from a Custom Metadata type record use: {CustomMetadata__Name__c} or {CustomMetadata__Name__r.Name}

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.

SETUP
Object Manager (153+ items, Sorted by Label)

Object	API Name	Type	Last Modified
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 (2)	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

Setup > OBJECT MANAGER
Room Booking

Fields & Relationships

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 “Master-detail Relationship”

4. Click on Next

Setup > OBJECT MANAGER
Room Booking

Fields & Relationships

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

Data Type	Description
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.
<input checked="" type="radio"/> Master-Detail Relationship	<p>Creates a special type of parent-child relationship between this object (the child, or “detail”) and another object (the parent, or “master”) where:</p> <ul style="list-style-type: none"> The relationship field must be present on all derived objects. The ownership and sharing of detail records 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. <p>The relationship field allows 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 the list.</p>
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a pop-up calendar.
<input type="radio"/> Date/Time	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.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

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.
2. Go to setup ? click on Object Manager ? type object name(Room Booking) in the search bar ? click on the object.
3. Now click on “Fields & Relationships” ? New
4. Select Data Type as a “Currency”
5. Click on Next
6. 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.
2. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
3. Now click on “Fields & Relationships” ? New
4. Select Data Type as a “Master-detail Relationship”
5. 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

Total Room
New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Previous Next Cancel

Select Object to Summarize

Master Object: Total Room
Summarized Object: Room Bookings

Select Roll-Up Type

COUNT SUM MIN MAX

Field to Aggregate: None

Filter Criteria

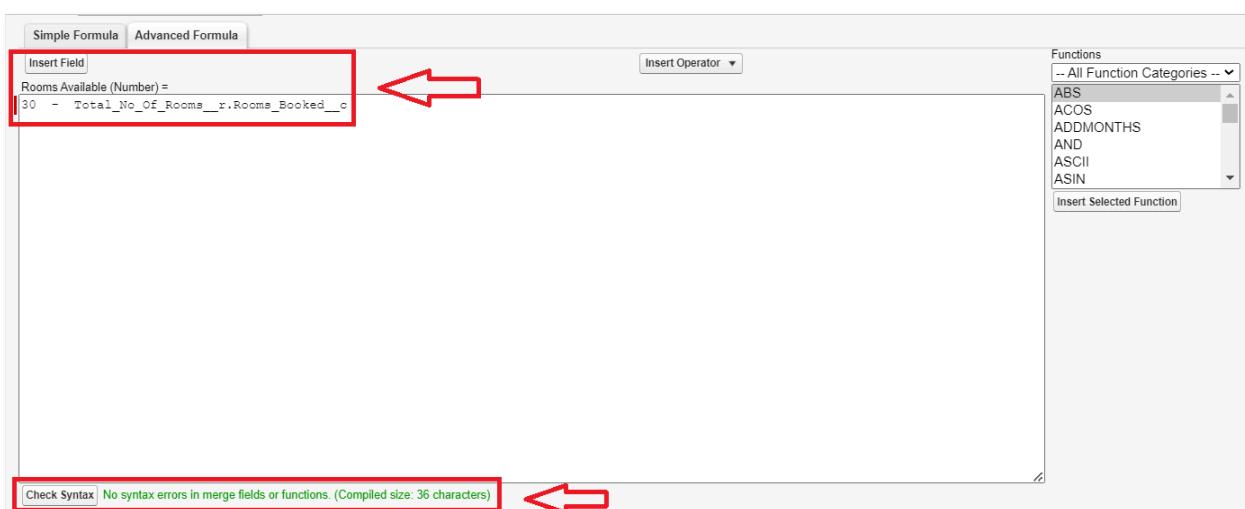
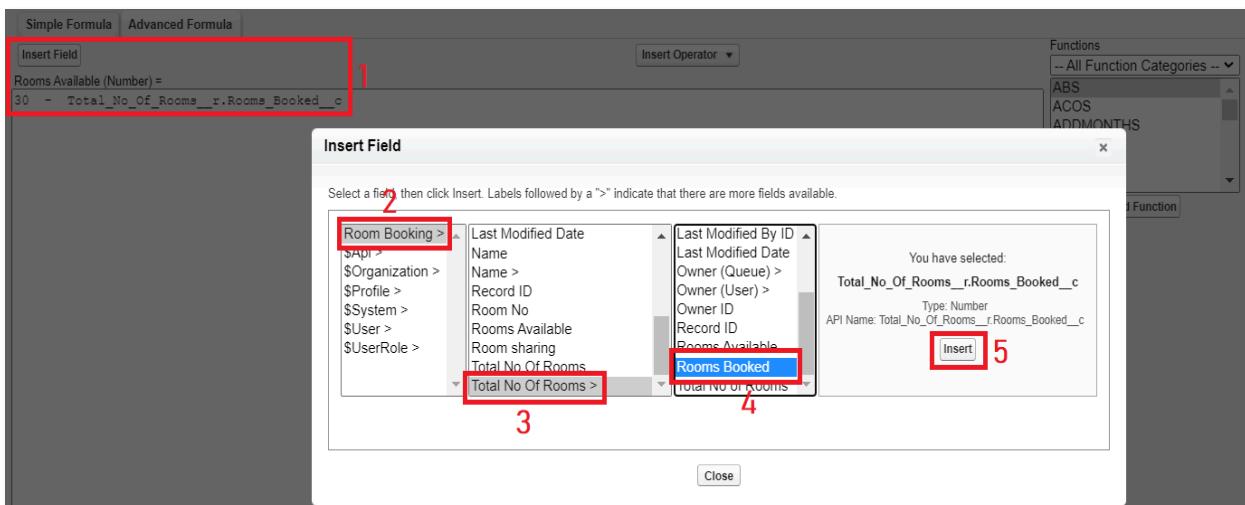
All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Help for this Page

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

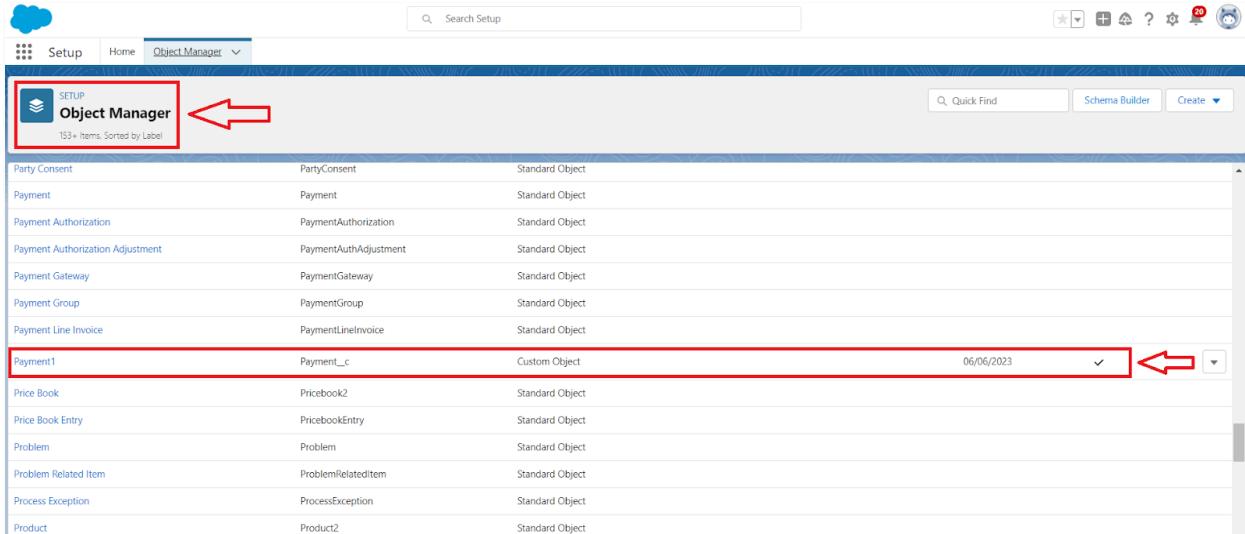
10. To create fields in an object:

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

Creation Of Fields & Relationship For Payment1 Object

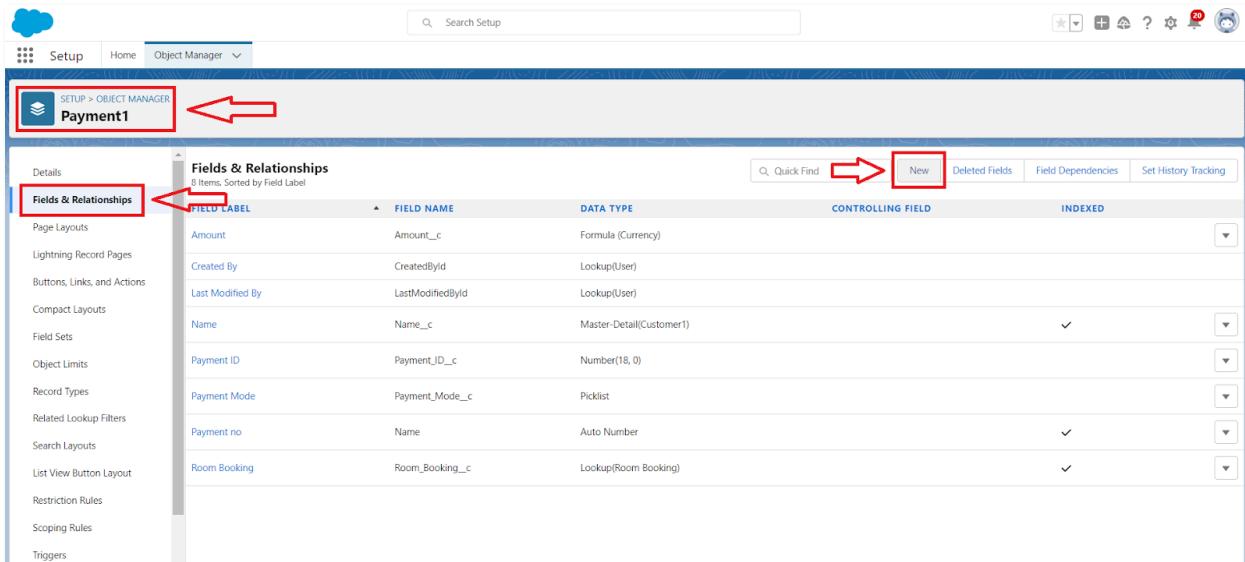
1. To create fields & relationship to an object:

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



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__c	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



Fields & Relationships				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)		
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number		
Room Booking	Room_Booking__c	Lookup(Room Booking)		

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

SETUP > OBJECT MANAGER
Payment1

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
Scooping Rules

Data Type
Select one of the data types below.

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

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

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

4. Click on Next

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

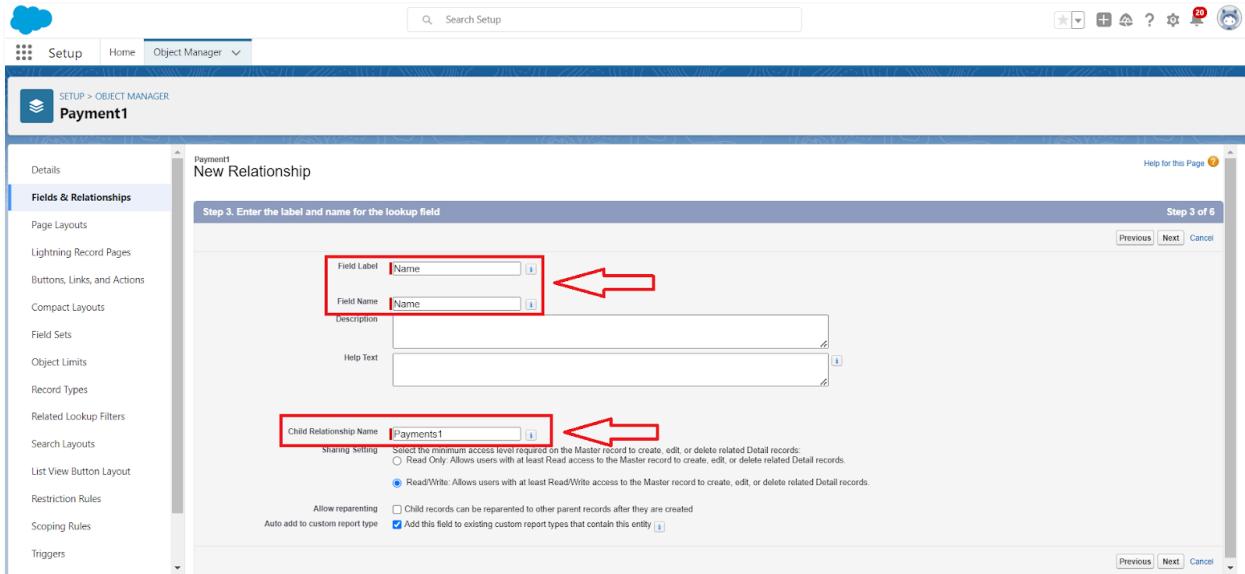
SETUP > OBJECT MANAGER
Payment1

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

Step 2. Choose the related object
Select the other object to which this object is related.

Related To:

Credit Memo Line
Customer
D&B Company
Data Use Legal Basis
Email
Engagement Channel Type
Engagement Channel Work Type
Entitlement
Feedback
Food Selection
Incident
Incident Related Item



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.

Object	Label	Type	Created Date
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_c	Custom Object	06/06/2023
Price Book	Pricebook2	Standard Object	
Price Book Entry	PricebookEntry	Standard Object	
Problem	Problem	Standard Object	
Problem Related Item	ProblemRelatedItem	Standard Object	
Process Exception	ProcessException	Standard Object	
Product	Product2	Standard Object	

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

SETUP > OBJECT MANAGER

Payment1

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		✓
Created By	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 “Lookup Relationship”

4. Click on Next

SETUP > OBJECT MANAGER

Payment1

Fields & Relationships

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

Data Type

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

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

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

Master-Detail Relationship Creates a relationship that links this object to another object whose data is stored outside the Salesforce org.

External Lookup Relationship

None Selected

Auto Number

Formula

Roll Up Summary

External Lookup Relationship

Lookup Relationship

Master-Detail Relationship

None Selected

Auto Number

Formula

Roll Up Summary

External Lookup Relationship

None Selected

Auto Number

Formula

Roll Up Summary

External Lookup Relationship

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. The top screenshot shows 'Step 2. Choose the related object' where 'Room Booking' is selected from a dropdown menu. The bottom screenshot shows 'Step 3. Enter the label and name for the lookup field' where 'Field Label' is set to 'Room Booking', 'Field Name' is auto-generated as 'Room_Booking', and 'Child Relationship Name' is set to 'Payments1'. Both screenshots have red arrows pointing to the respective fields.

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.

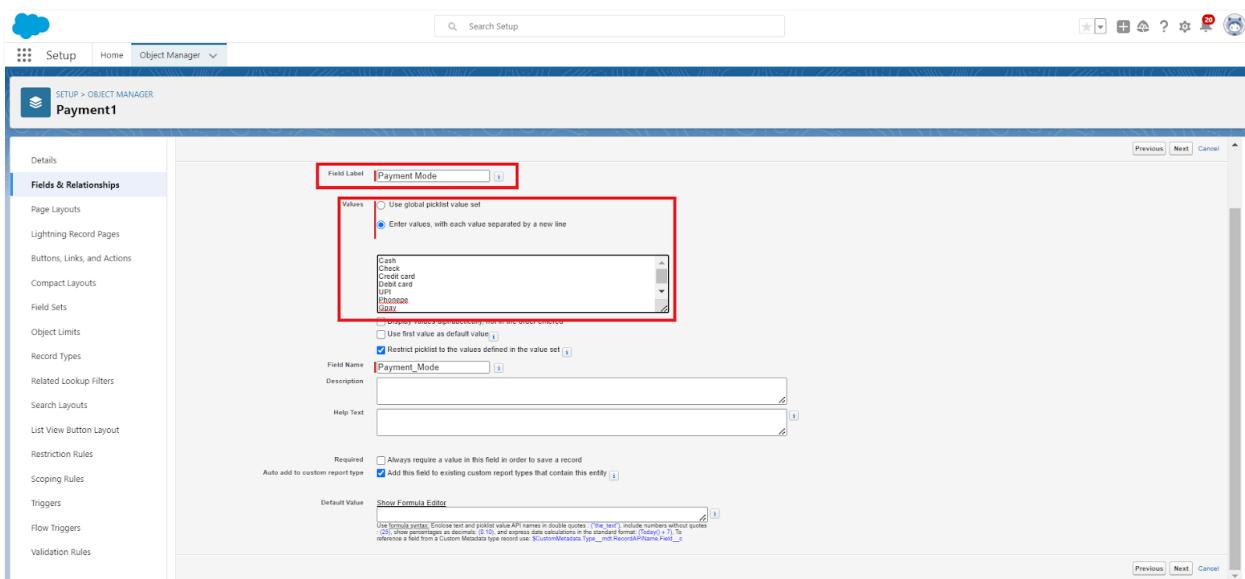
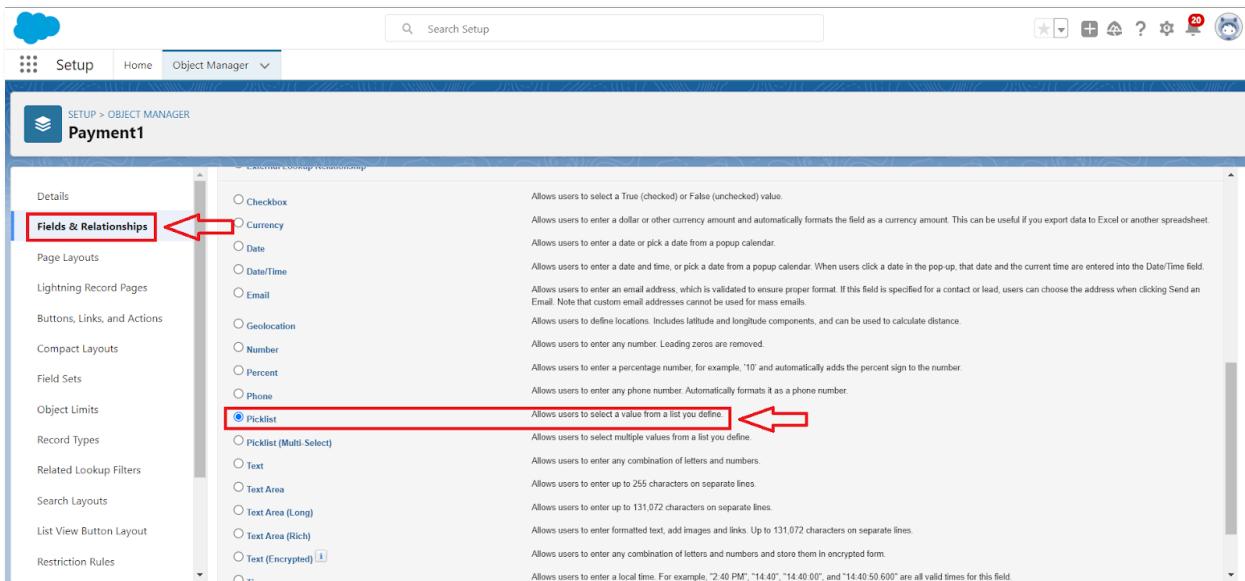
3. Creation of another fields for the Payment1 object

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.

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

3. Select Data Type as a “Picklist”



4. Fill the Above as following:

- **Field Label: Payment Mode**
- **Value - Select enter values with each value separated by a new line**
 1. **Cash**
 2. **Check**
 3. **Credit card**
 4. **Debit card**
 5. **UPI**
 6. **Phonepe**
 7. **Gpay**
 8. **Paytm**

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

Cross Object Formula Field:

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

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

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

4. Create a Cross object formula Field in Payment1 Object

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

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

3. Select Data Type as a “Formula”

4. Click on Next

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

6. In the Advanced Formula Click on the Insert field in the popup Screen Select the Payment1 and in the second drop down select the Room Booking and in the three drop down select the Amount field and click on Insert “Room_Booking__r.Amount__c ”.

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

Creation Of Fields For The Food Selection Object

1. To create fields & relationship to an object:

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

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

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

4. Click on Next

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

6. Next

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

Picklist value sets:

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

Create a picklist value set:

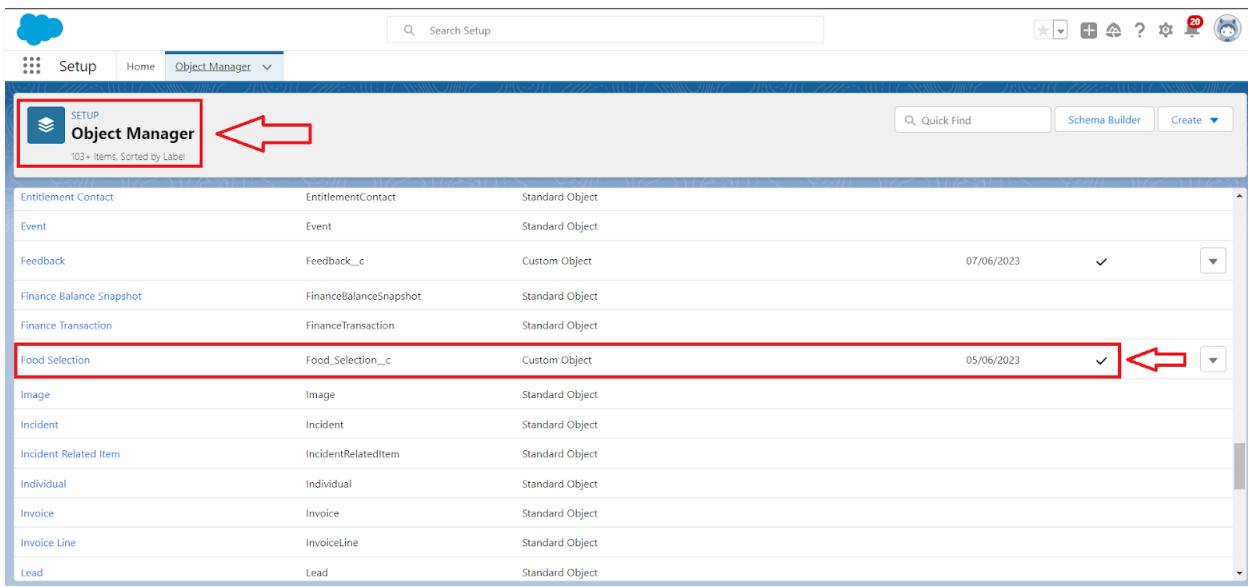
1. First click on gear icon and click on setup
 2. Click on home tab in the Quick find box search for the “ Picklist value sets ”
 3. Click on the Picklist value set and click on new
-
4. Enter the Label name and API name automatically Generate
 5. Enter the values with each value separated by a new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

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

2. Create a picklist Field for Food selection object

To create fields in an object:

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



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A red box highlights the 'Object Manager' tab, and a red arrow points to it from the left. The main area displays a list of objects with columns for Name, Label, and Type. The 'Food Selection' object is highlighted with a red box and a red arrow pointing to its row. The 'Label' column for 'Food Selection' contains 'Food_Selection__c' and the 'Type' column indicates it is a 'Custom Object'. The date '05/06/2023' is also visible in the same row.

Name	Label	Type
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
Invoice	Invoice	Standard Object
Invoice Line	InvoiceLine	Standard Object
Lead	Lead	Standard Object

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

3. Select Data Type as a “Picklist”

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

3. Create a another picklist Field for Food selection object

To create fields in an object :

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

The screenshot shows the Salesforce Object Manager page. At the top left, there is a red box around the 'Object Manager' tab, with a red arrow pointing to it from the left. On the far right of the header, there is another red box around the dropdown menu, with a red arrow pointing to it from the right. The main area displays a list of objects, with the 'Food Selection' object highlighted by a red box and a red arrow pointing to it from the right.

Object Label	Object Name	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		

3.

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

- a. Fill the Above as following:
- Field Label: Select Breakfast
 - Under Value - Enter values, with each value separated by a new line
 - a. Idli
 - b. Bonda
 - c. Dosa
 - d. Upma
 - e. Vada
 - f. Puri

- g. Chapati
 - Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.
- 4.

Field Dependency:

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

Need to use Field Dependency:

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

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

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

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

3. Now Click on New Option

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

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

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

To create a Field dependencies for Dinner and Select Dinner.

14. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
15. Now Click on fields & relationships and Click on Field Dependencies
16. Now Click on New Option
17. Under Controlling Field: Dinner, Dependent Field: Select Dinner and Click on Continue
18. 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.

The screenshot shows the 'Edit Field Dependency' page in the Salesforce Setup. The 'Controlling Field' is set to 'Dinner' and the 'Dependent Field' is set to 'Select dinner'. The 'Sunday' column is selected, and the picklist values 'Chicken biryani', 'curd rice', and 'chicken noodles' are included. The 'Included Values' button is highlighted with a red arrow. The 'Save' button at the top right is also highlighted with a red arrow.

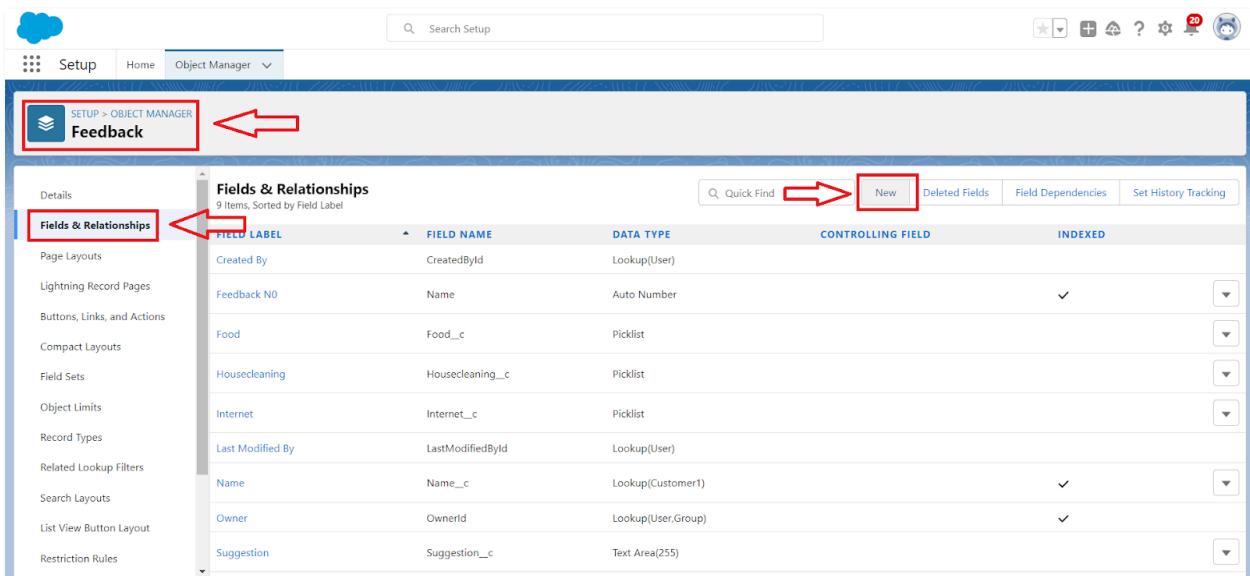
Creation Of Fields For The Feedback Object

1. create fields & relationship to an object:

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



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



3. Select Data Type as a “Lookup Relationship”

4. Click on Next

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

6. Fill the Above as following:

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

2. To create Another fields in an Same object:

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

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

SETUP > OBJECT MANAGER
Feedback

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

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	
Housedleaning	Housedleaning__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 “Picklist”

SETUP > OBJECT MANAGER
Feedback

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

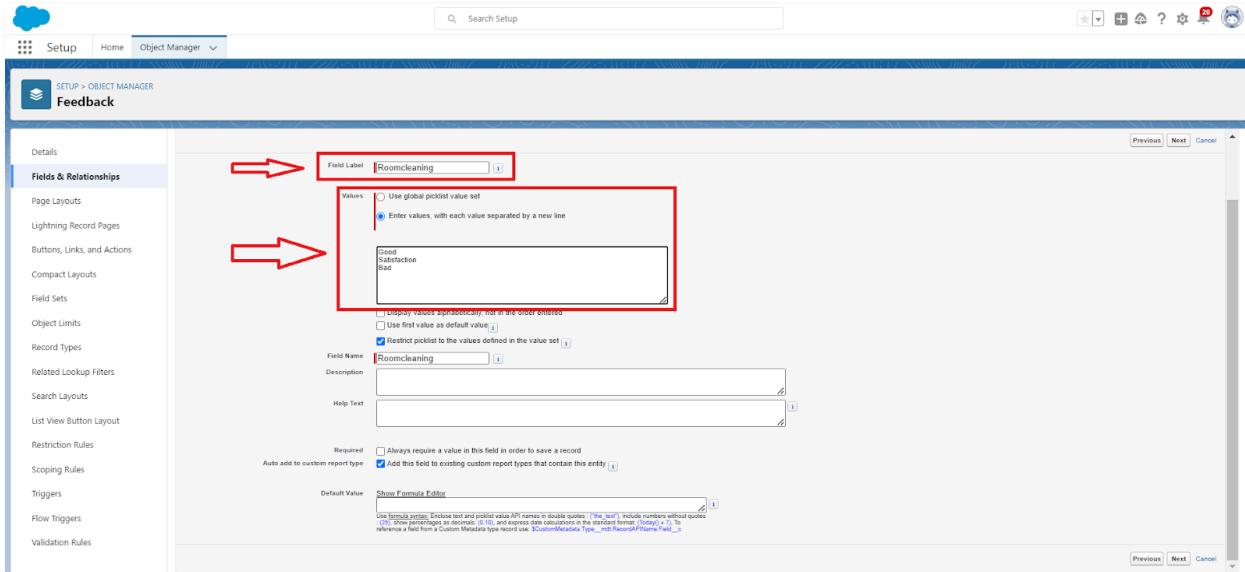
List View Button Layout

Restriction Rules

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) 1
- Time
- URL

4. Click on Next



5. Fill the Above as following:

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

3. To create a Another Fields in an Same Object

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

4. To create a Another Fields in an Same Object

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

5. To create a Another Fields in an Same Object

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

Creation Of Fields For The Total Rooms Object

1. To create fields in an object:

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

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

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

4. Fill the Above as following:
5. Field Label: Rooms Available

6. Field Name : It's gets auto generated
7. Select the Formula Return Type as "Number"
8. Select the Decimal places as "0" and Click on Next

Note: I am Considering "Total No Of Rooms = 30" While creating a new record in Total Rooms Object.

9. Click on the Advanced Formula "30 - Rooms_Booked_c" and Check Syntax

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

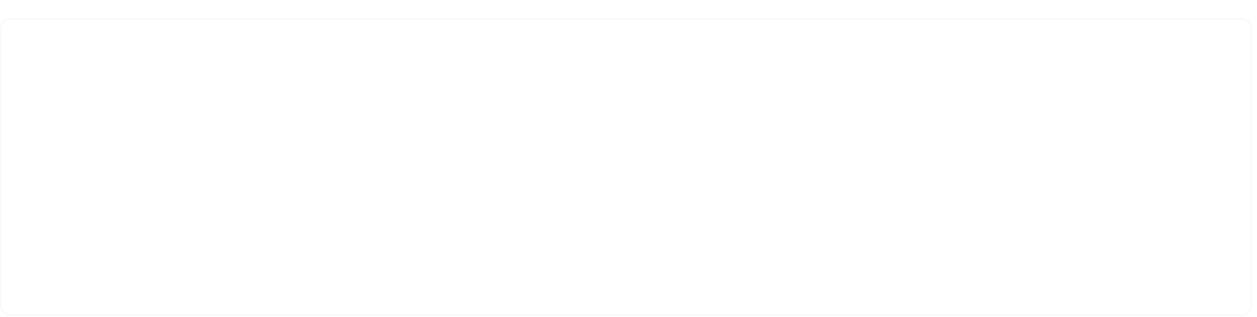
Task - 6 Validation Rule

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.

Create A Validation Rule To An Room Booking Object

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

- 
2. Now click on “Validation rule” at top > New.

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

7. Click on save.

Create A Another Validation Rule To An Room Booking Object

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

Rule Name: 1

Active:

Description:

Error Condition Formula

Example: More Examples...
Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

2

Check_in_c = False

Functions

- All Function Categories
- CONTAINS
- COS
- CURRENCYRATE
- DATE
- DATETIMEVALUE
- DATEVALUE
- Insert Selected Function
- ABS(number)
Returns the absolute value of a number, a number without its sign
- Help on this function

Check Syntax No errors found

Error Message

Example:
This message will appear when Error Condition formula is true

Error Message: 3

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field 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 - Custom User Profile

To create a new profile:

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

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

3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give All access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

5. Scroll down and Click on Save.

Activity 2 - Custom Platform User1

To create a new profile:

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard platform User)
2. Enter profile name (Custom platform User1) > Save.
3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give only Read access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

5. Scroll down and Click on Save.

Activity 3 - Custom Platform User2

To create a new profile:

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



5. Scroll down and Click on Save.

Task - 8 Roles

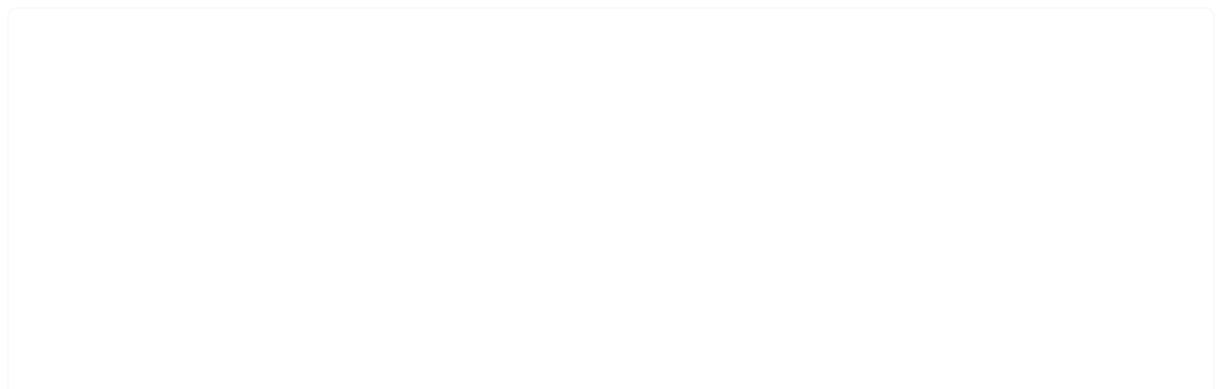
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Activity 1 - Marketing Role

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



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



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

4. Then click on Save.

Activity 2 - Receptionist Role

1. Go to quick find > Search for Roles > click on set up roles.
2. Click on Expand All and click on add role under CEO role.
3. Give Label as “Receptionist” and Role name gets auto populated.
- 4.

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'. A red arrow points to the 'Label' field. At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'. A second red arrow points to the 'Save' button.

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 - 1Create User

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

-
2. Fill in the fields
 - First Name : sandeep
 - Last Name : gujja
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.com
 - Nick Name : Give a Nickname
 - Role : CEO
 - User licence : Salesforce
 - Profiles : Custom user

3. save.

Activity 2 - Create Another User

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

3. save

Activity - 3 Create Another User

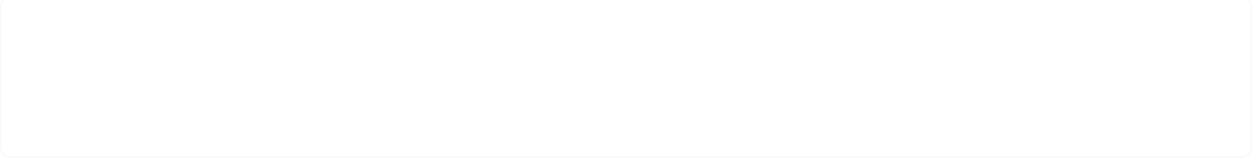
1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : Ganesh
 - Last Name : gelli
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.com
 - Nick Name: Give a Nickname
 - Role : Receptionist
 - User licence: Salesforce Platform
 - Profiles : Custom Platform user2

3. Save

Activity - 10User Adoption

Activity - 1 Create A Record (Customers)

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

- 
- 
3. Click on the Customers Tab.

- 
4. Click new and fill details & Save

Activity - 2 View A Record (Customers)

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

The screenshot shows the Co-Living application interface. At the top, there is a navigation bar with tabs: Co-Living, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Customers' tab is highlighted with a red box and an arrow. Below the navigation bar is a search bar labeled 'Search...'. The main area displays a list of customers under the heading 'Recently Viewed'. One customer, 'sandeep', is selected and highlighted with a red box and an arrow. The details for 'sandeep' are shown in a modal window titled 'Customer1 sandeep'. The modal has two tabs: 'Related' and 'Details', with 'Details' selected. The 'Details' tab contains the following information:

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

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.

Recently Viewed

	Customer Name
1	<input type="checkbox"/> sandeep 2
2	<input type="checkbox"/> Abhilash
3	<input type="checkbox"/> Ganesh
4	<input type="checkbox"/> suman
5	<input type="checkbox"/> Prasad

New Import Change Owner

Q, Search this list... 3 4

Edit Delete Change Owner

Activity - 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 page. At the top, there is a navigation bar with tabs for Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is currently selected), and Dashboards. Below the navigation bar, there is a sidebar on the left with sections for Reports, Recent (3 items), Created by Me, Private Reports, Public Reports, and All Reports. The main area displays a table of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. Three specific areas are highlighted with red boxes and numbers: 1 points to the 'Co-Living' report in the Recent section of the sidebar; 2 points to the 'Reports' tab in the navigation bar; and 3 points to the 'New Report' button in the top right corner of the main report list area.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	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	

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
Recently Used
All 1
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders
Price Books, Products and Assets

Select a Report Type

2

Report Type Name	Category
Activities with Customers	Standard
Customers 3	Standard
Customers with Room Bookings and Total Rooms	Standard 4
Customers with Payments	Standard
Customers with Payments and Room Booking	Standard
Customers with Food Selections	Standard
Total Rooms with Room Bookings and Customers	Standard
Customers with Room Bookings with Total Rooms	Custom
Customers with Room Bookings with Payments	Custom

4. Customize your report

5. Add fields from left pane as shown below

The screenshot shows the 'Report' interface for a 'Room booking report' titled 'Customers with Room Bookings with Payments'. The Fields panel on the left is highlighted with a red box and arrows pointing to the 'Groups' and 'Columns' sections. The preview grid on the right shows customer data with various filters and grouping applied.

Customer Name	Room No	Phone no	Email id	Permanent Address	current Status	Room sharing	Advance payment for 1month	AC - 3000	Amount
RN-006	7300788526	abhi@gmail.com	Chandavaram	Employee	single sharing - 14000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	₹28,000
Ganesh	868875423	ganesh@gmail.com	Tadiparvu	Student	Triple sharing - 10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	₹20,000
Subtotal						1	0	0	₹20,000
Prasad	9494724362	varaprasadandrohu@gmail.com	Tadiparvu	Employee	single sharing - 14000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	₹34,000
Subtotal						1	1	1	₹34,000
sandeep	970526532	sandeep@gmail.com	Hyderabad	Employee	Triple sharing - 10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	₹20,000
Subtotal						2	0	0	₹40,000
suman	870567262	suman@gmail.com	Ichapuram	Employee	Double sharing - 12000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	₹30,000
Subtotal						1	1	1	₹30,000
Total						6	2	2	₹156,000

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

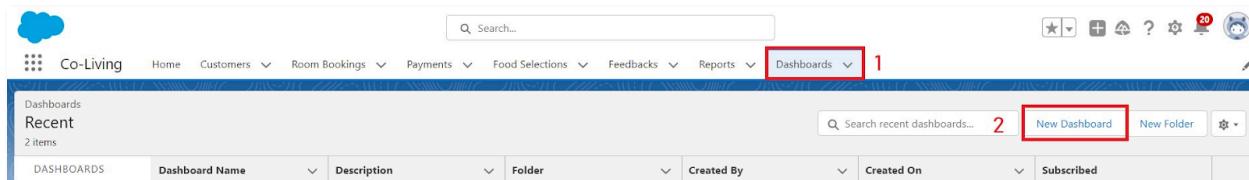
6. Save or run it.

Task - 12 Dashboards

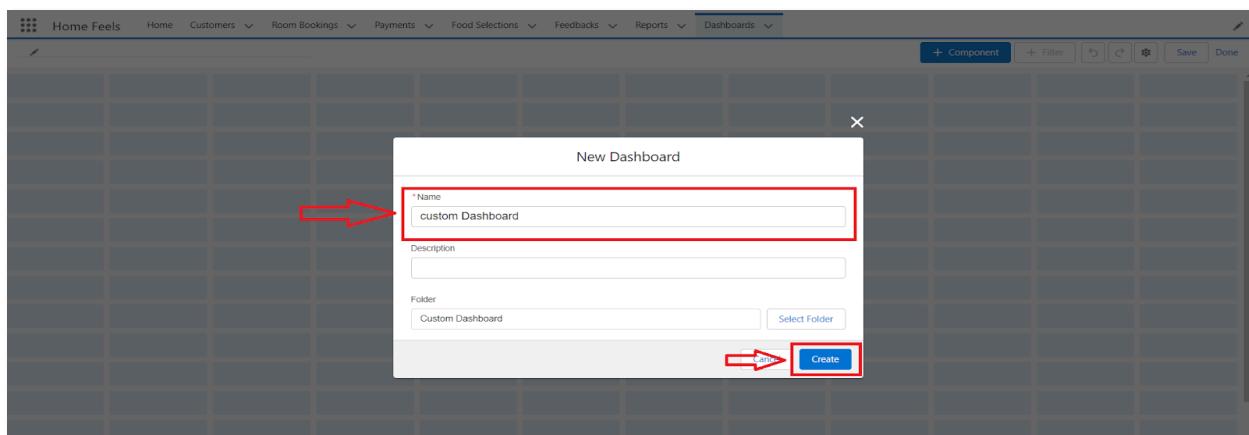
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Activity - 1Create 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
Veera Venkata Varaprasad Androthu · 14-Jun-2023, 2:58 pm · custom report

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

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

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 \(Room booking report\)](#)

Customer Name

Abhilash
Ganesh
Prasad
sandeep
suman

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

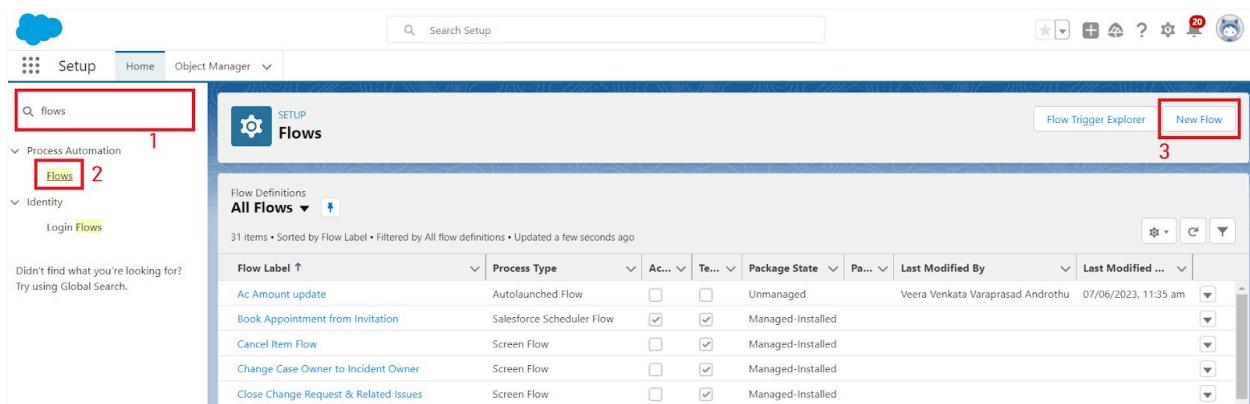
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

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

1

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.

2

Create

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

Configure Start

Select Object

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

Object
Room Booking 1

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated 2
- A record is deleted

Set Entry Conditions

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

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

Condition Requirements
None

* Optimize the Flow for:

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

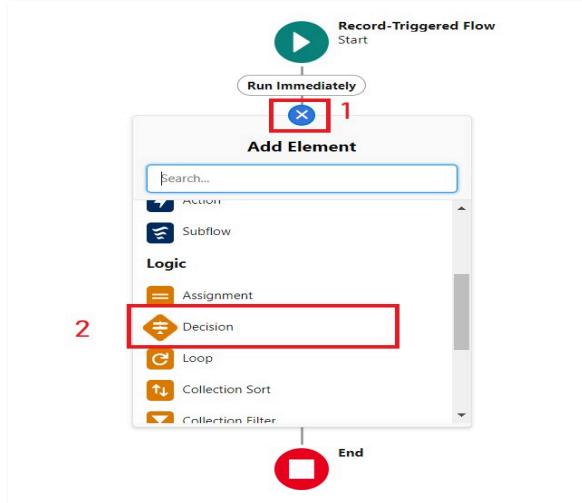
Actions and Related Records 3
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

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

4

Cancel Done

6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element”.



7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Single sharing.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on “+” Symbol In the Outcome Order.

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 2 + 4	OUTCOME DETAILS 2 * Label Single Sharing * Outcome API Name Single_Sharing												
Default Outcome 3 Condition Requirements to Execute Outcome All Conditions Are Met (AND)													
<table border="1"> <tr> <td>Resource \$Record > Room sharing</td> <td>Operator Equals</td> <td>Value single sharing</td> </tr> <tr> <td>Resource \$Record > AC - 3000</td> <td>Operator Equals</td> <td>Value False</td> </tr> <tr> <td colspan="3">AND</td> </tr> <tr> <td colspan="3">+ Add Condition</td> </tr> </table>		Resource \$Record > Room sharing	Operator Equals	Value single sharing	Resource \$Record > AC - 3000	Operator Equals	Value False	AND			+ Add Condition		
Resource \$Record > Room sharing	Operator Equals	Value single sharing											
Resource \$Record > AC - 3000	Operator Equals	Value False											
AND													
+ Add Condition													
<input type="button" value="Cancel"/> <input type="button" value="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.

OUTCOME ORDER 1 + 3	OUTCOME DETAILS 1 * Label Double sharing * Outcome API Name Double_sharing									
Default Outcome 2 Condition Requirements to Execute Outcome All Conditions Are Met (AND)										
<table border="1"> <tr> <td>Resource \$Record > Room sharing</td> <td>Operator Equals</td> <td>Value Double sharing</td> </tr> <tr> <td>Resource \$Record > AC - 3000</td> <td>Operator Equals</td> <td>Value False</td> </tr> <tr> <td colspan="3">AND</td> </tr> </table>		Resource \$Record > Room sharing	Operator Equals	Value Double sharing	Resource \$Record > AC - 3000	Operator Equals	Value False	AND		
Resource \$Record > Room sharing	Operator Equals	Value Double sharing								
Resource \$Record > AC - 3000	Operator Equals	Value False								
AND										

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 + 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

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 + 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: {!\$GlobalConstant.True}

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 + 3

OUTCOME DETAILS 1

* Label: Double Ac * Outcome API Name: Double_Ac

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

2

Resource: \$Record > Room sharing	Operator: Equals	Value: Double sharing
Resource: \$Record > AC - 3000	Operator: Equals	Value: !\$GlobalConstant.True

Default Outcome

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

Outcome Details:

- Label:** Triple Ac
- Outcome API Name:** Triple_Ac
- Condition Requirements to Execute Outcome:** All Conditions Are Met (AND)
- Conditions:**
 - Resource: \$Record > Room sharing, Operator: Equals, Value: Triple sharing
 - AND: \$Record > AC - 3000, Operator: Equals, Value: True

When to Execute Outcome:

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

Default Outcome + Add Condition

3 Done

```

graph TD
    Start((Record-Triggered Flow)) --> Run[Run Immediately]
    Run --> Decision{Field Should be Update Decision}
    Decision --> SingleSharing[Single Sharing]
    Decision --> DoubleSharing[Double sharing]
    Decision --> TripleSharing[Triple Sharing]
    Decision --> SingleAc[Single Ac]
    Decision --> DoubleAc[Double Ac]
    Decision --> TripleAc[Triple Ac]
    Decision --> Default[Default Outcome]
    SingleSharing --> End(((End)))
    DoubleSharing --> End
    TripleSharing --> End
    SingleAc --> End
    DoubleAc --> End
    TripleAc --> End
    Default --> End
  
```

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	* API Name
single	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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

Set Field Values for the Room Booking Record

Field	Value
Amount__c	28000

Cancel Done

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	* API Name
Double	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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

Set Field Values for the Room Booking Record

Field	Value
Amount__c	24000

+ Add Field

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

Triple

*API Name

Triple

Description

* How to Find Records to Update and Set Their Values

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field

Amount_c

Value

20000



[+ Add Field](#)

[Cancel](#)

[Done](#)

18. Enter the update records details

- **Label:** Single ac1.
- **API name:** Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- **Field:** Amount.
- **Value:** 34000.
- **Click on Done.**

Edit Update Records

Update Salesforce records using values from the flow.

* Label	* API Name
single_ac1	single_ac1
Description	
<input type="text"/>	

* 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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field	Value
Amount__c	34000

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	* API Name
Double_ac1	Double_ac1
Description	
<input type="text"/>	

* 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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

Set Field Values for the Room Booking Record

Field	Value
Amount_c	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

i 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

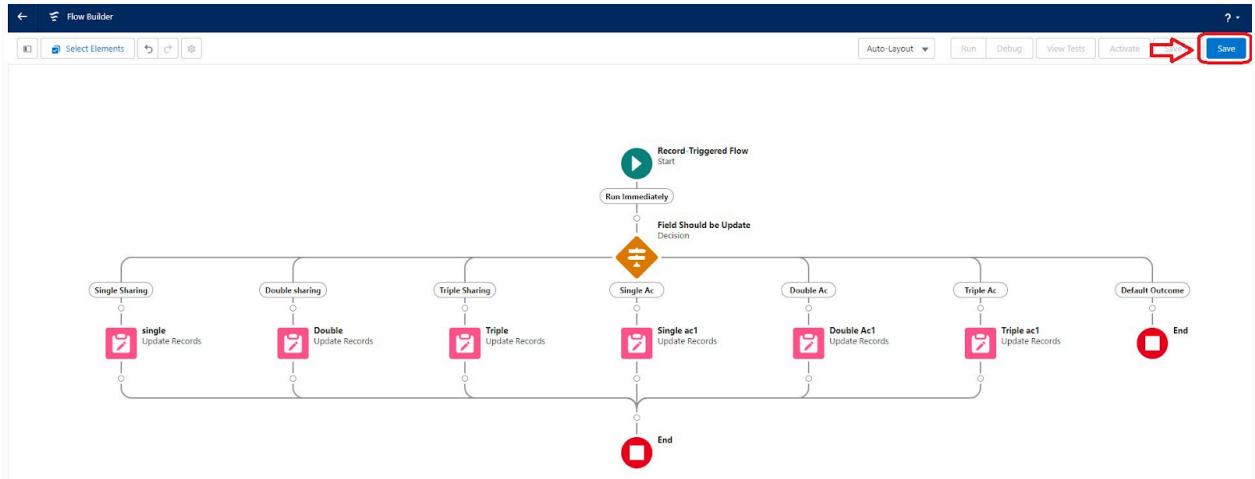


+ Add Field

Cancel

Done

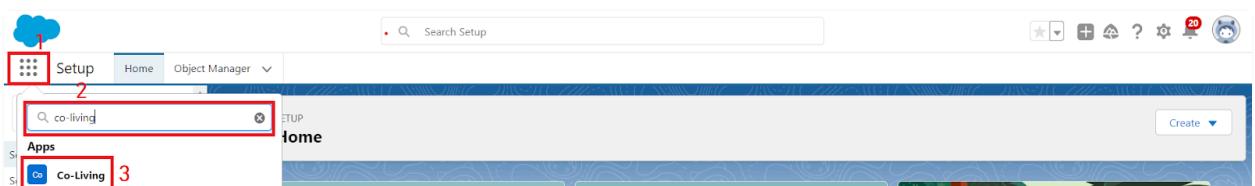
21. The Flow will Form like This and Click on save.



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

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 <input checked="" type="checkbox"/>
Amount	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

Room Bookings RN-008

Related	Details
Room No	AC - 3000 <input checked="" type="checkbox"/>
Name	Prasad <input checked="" type="checkbox"/>
Room sharing	Double sharing - 12000 <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.

