

PROJECT REPORT ON

A CRM Application To Manage The Booking Of Co-Living

(Salesforce Admin/Developer) - (Long-Term)

INTRODUCTION:

Our 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.

Salesforce:

Salesforce is the customer company. We make cloud-based software designed to help businesses connect to their customers in a whole new way, so they can find more prospects, close more deals, and wow customers with amazing service. Customer 360, our complete suite of products, unites your sales, service, marketing commerce, and IT teams with a single, shared view of customer information, so that your company can become a customer company, too.

Milestone – 01: Create Salesforce Org

Go to **[developers.salesforce.com/Signup](https://developers.salesforce.com/signup)**

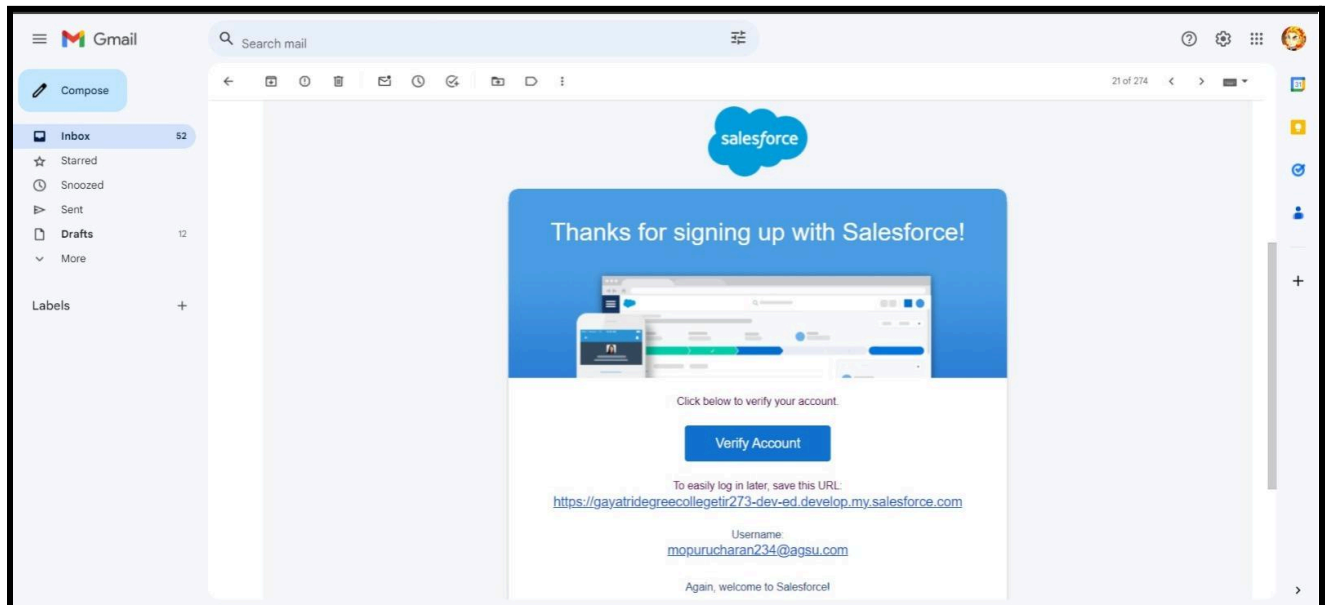
Click on sign up.

On the sign-up form, enter the following details:

1. First name & Last name : **CHARAN KUMAR**
2. Email : **mopurucharan234@gmail.com**
3. Role: **Administrator**
4. Company: **GAYATRI DEGREE COLLEGE - TIRUPATI**
5. County: **India**
6. Postal Code: **517501**
7. Username: **mopurucharan234@gdcproject.com**

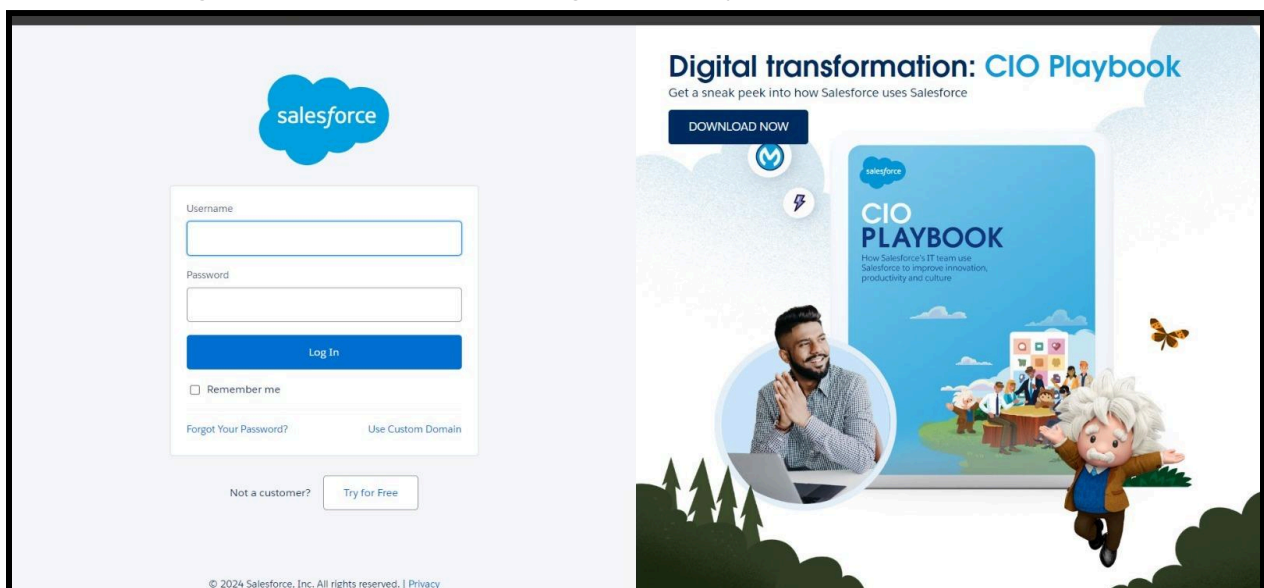
Account Activation:

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,



Login to Your Salesforce Account:

1. Go to **salesforce.com** and click on login.
2. Enter the **username** and **password** that you just created.
3. After login this is the home page which you will see.



Milestone – 02: Creation of custom objects

Create A Custom Object For Total Rooms:

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

The screenshot shows the Salesforce Setup interface for a custom object named "Total Room". The breadcrumb trail is "SETUP > OBJECT MANAGER". The left sidebar contains a list of configuration options: Details (selected), 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, and Restriction Rules. The main content area is titled "Details" and includes an "Edit" button and a "Delete" button. The "Description" field is empty. The "API Name" field contains "Total_Room__c". The "Custom" checkbox is checked. The "Singular Label" field contains "Total Room". The "Plural Label" field contains "Total Rooms". The "Enable Reports" checkbox is checked. The "Track Activities" checkbox is checked. The "Track Field History" checkbox is checked. The "Deployment Status" dropdown is set to "Deployed". The "Help Settings" dropdown is set to "Standard salesforce.com Help Window".

Field	Value
Description	
API Name	Total_Room__c
Custom	✓
Singular Label	Total Room
Plural Label	Total Rooms
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Create A Custom Object For Customer1:

- From setup click on object manager.
- Click create, select custom object.
- Fill in the label as " **Customer1** ".
- Fill in the plural label as " Customers ".
- Record name: "Customer Name"
- Select the data type as "Text".
- In the Optional Features section, select Allow Reports and Track Field History.
- In the Deployment Status section, ensure Deployed is selected.
- In the Search Status section, select Allow Search.
- In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
- Leave everything else as is, and click Save.

The screenshot displays the Salesforce Setup interface for a custom object named 'Customer1'. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'SETUP > OBJECT MANAGER Customer1' and features a 'Details' tab. The 'Details' section is divided into two columns. The left column contains fields for 'Description', 'API Name' (Customer1_c), 'Custom' (checked), 'Singular Label' (Customer1), and 'Plural Label' (Customers). The right column contains checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), and 'Deployment Status' (Deployed). At the bottom right of the 'Details' section, there are 'Edit' and 'Delete' buttons. A link to 'Help Settings' and a note 'Standard salesforce.com Help Window' are also visible.

Field	Value
Description	
API Name	Customer1_c
Custom	✓
Singular Label	Customer1
Plural Label	Customers
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed

Create A Custom Object For Room Booking:

- From setup click on object manager.
- Click create, select custom object.
- Fill in the label as " **Room Booking** ".
- Fill in the plural label as " Room Bookings ".
- Record name: "Room No "
- Select the data type as "Auto number ".
- Under Display format enter RN-{000}
- Enter starting Number as 1
- In the Optional Features section, select Allow Reports and Track Field History.
- In the Deployment Status section, ensure Deployed is selected.
- In the Search Status section, select Allow Search.
- In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
- Leave everything else as is, and click Save.

The screenshot shows the Salesforce Setup interface for a custom object named "Room Booking". The breadcrumb trail is "SETUP > OBJECT MANAGER". The left sidebar contains a list of configuration options: Details (selected), 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, and Restriction Rules. The main content area is titled "Details" and includes a description field, API Name (Room_Booking__c), Custom checkbox (checked), Singular Label (Room Booking), Plural Label (Room Bookings), and a list of optional features: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are located in the top right corner of the details section.

Field	Value
Description	
API Name	Room_Booking__c
Custom	✓
Singular Label	Room Booking
Plural Label	Room Bookings
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Create A Custom Object For Payment:

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

The screenshot shows the Salesforce Setup interface for a custom object named "Payment1". The breadcrumb trail is "SETUP > OBJECT MANAGER". The left sidebar contains a list of configuration options: Details (selected), 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, and Restriction Rules. The main content area is titled "Details" and includes an "Edit" button and a "Delete" button. The "Description" field is empty. The "API Name" field contains "Payment1_c". The "Custom" checkbox is checked. The "Singular Label" field contains "Payment1". The "Plural Label" field contains "Payments". The "Enable Reports" checkbox is checked. The "Track Activities" checkbox is checked. The "Track Field History" checkbox is checked. The "Deployment Status" field contains "Deployed". The "Help Settings" field contains "Standard salesforce.com Help Window".

Field	Value
Description	
API Name	Payment1_c
Custom	<input checked="" type="checkbox"/>
Singular Label	Payment1
Plural Label	Payments
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Create A Custom Object For Food Selection:

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

The screenshot shows the Salesforce Setup interface for a custom object named 'Food Selection'. The breadcrumb trail is 'SETUP > OBJECT MANAGER'. The left sidebar contains a list of configuration options: 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, and Restriction Rules. The 'Details' section is active, showing the following configuration:

Field	Value
Description	
API Name	Food_Selection__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Food Selection
Plural Label	Food Selections
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

Create A Custom Object For Feedback:

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

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup'. Below it, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' section is active, showing a breadcrumb 'SETUP > OBJECT MANAGER' and the object name 'Feedback'. On the left, a sidebar lists various configuration options: Details (selected), 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, and Restriction Rules. The main area is titled 'Details' and contains several fields: Description (empty), API Name (Feedback_c), Custom (checked), Singular Label (Feedback), and Plural Label (Feedbacks). To the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). Below these, the 'Deployment Status' is set to 'Deployed'. At the bottom right, there's a link for 'Standard salesforce.com Help Window'. 'Edit' and 'Delete' buttons are visible in the top right corner of the details section.

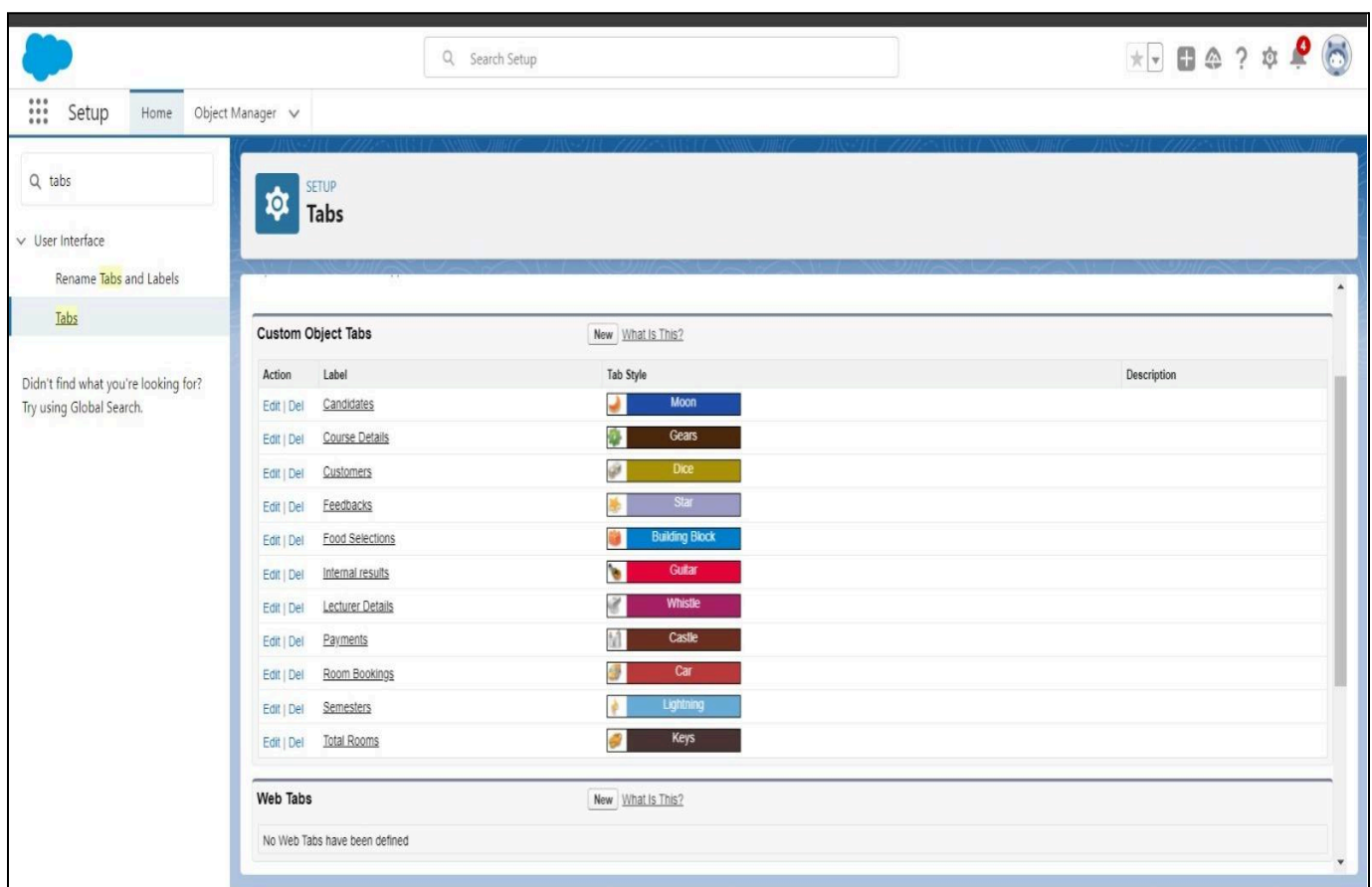
Milestone – 03 : Creating A Tab for the objects we created

Creating A Tab For Total Rooms:

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

NOTE:

Now create the tabs for remaining objects for **Customers,Room Bookings,Payments, Food Selections, Feedbacks Objects.**



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered, and the 'User Interface' section is expanded, showing 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'SETUP Tabs' and contains a table of 'Custom Object Tabs'. The table has columns for Action, Label, Tab Style, and Description. The 'Total Rooms' object is highlighted in the table. Below the table, there is a section for 'Web Tabs' which currently shows 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
Edit Del	Candidates	Moon	
Edit Del	Course Details	Gears	
Edit Del	Customers	Dice	
Edit Del	Feedbacks	Star	
Edit Del	Food Selections	Building Block	
Edit Del	Internal results	Guitar	
Edit Del	Lecturer Details	Whistle	
Edit Del	Payments	Castle	
Edit Del	Room Bookings	Car	
Edit Del	Semesters	Lightning	
Edit Del	Total Rooms	Keys	

Web Tabs

No Web Tabs have been defined

Milestone – 04: Create A Lightning App:

1. Go to the setup page ,search “app manager” in quick find ,select “app manager” ,click on New lightning App.
2. Fill the app name in app details and branding “**Co-Living**”,Next (App option page) keep it as default, Next Utility Items) keep it as default ? Next.
3. To Add Navigation Items: Ctrl and Select the items (**Total Rooms, Customers1, Room Booking, Payments1, Food selection, Feedbacks, Reports and Dashboards**) from the search bar and move it using the arrow button ? Next,
4. To Add User Profiles
5. Search profiles (**System administrator**) in the search bar ? click on the arrow button ? save & finish.

The screenshot shows the 'App Details & Branding' configuration page in the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It is divided into two sections: 'App Details' and 'App Branding'. 'App Details' contains fields for 'App Name' (filled with 'Co-Living'), 'Developer Name' (filled with 'CoLiving'), and 'Description' (placeholder 'Enter a description...'). 'App Branding' includes an 'Image' upload area, a 'Primary Color Hex Value' dropdown (set to '#0070D2'), and 'Org Theme Options' with a checkbox 'Use the app's image and color instead of the org's custom theme' (unchecked). Below these is an 'App Launcher Preview' showing a blue square with 'Co' and a grey button labeled 'Co-Living'.

The screenshot shows the 'Navigation Items' configuration page in the Lightning App Builder. The left sidebar is the same as the previous screenshot, with 'Navigation Items' selected. The main content area is titled 'Navigation Items' and includes instructions: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' It is divided into two sections: 'Available Items' and 'Selected Items'. 'Available Items' has a search bar and a list of items including 'Accounts', 'All Sites', 'Alternative Payment Methods', 'Analytics', 'App Launcher', 'Appointment Categories', 'Appointment Invitations', 'Approval Requests', 'Asset Action Sources', and 'Asset Actions'. 'Selected Items' has a list of items including 'Home', 'Total Rooms', 'Customers', 'Room Bookings', 'Payments', 'Food Selections', 'Feedbacks', 'Reports', and 'Dashboards'. Arrows between the lists indicate the ability to move items.

Milestone – 05:Fields & Relationships

- **Creation Of Fields For The Customer1 Object:**

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

2. To create another fields in an object:

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

The screenshot shows the Salesforce Setup interface for the 'Customer1' object. The 'Fields & Relationships' section is active, displaying a table of 8 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The 'Current Status' field is highlighted in blue, indicating it is the selected field. The 'Current Status' field is a Picklist type, and its values are listed as 'Student', 'Employee', and 'Others'.

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	Email__c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Permanent Address	Permanent_Address__c	Text Area(255)		
Phone no	Phone_no__c	Phone		

- **Creation Of Fields For The 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 “Fields & Relationships” > click on New
3. Select Data Type as a “Picklist”
4. Click on Next
5. Fill the Above as following:
 - Field Label: **Room Sharing**
 - Value - Select enter values with each value separated by a new line
 1. Single sharing
 2. Double sharing
 3. Triple sharing
 - Select required
 - Click on Next > Next > Save and new.

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

To create fields & relationship to an object:

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

3. To create fields in an object:

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

5. To create fields in an object:

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

6. To Create a Fields & Relationship to an Object

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

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

1. After Creating the Master- Detail Relationship Than Only you can create the Rollup Summary
2. Go to setup > click on Object Manager > type object name(Total Rooms) in the search bar > click on the object.
3. Now click on “Fields & Relationships” > click on 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
7. Click on Next > Next > Save and new

8. To create fields in an object:

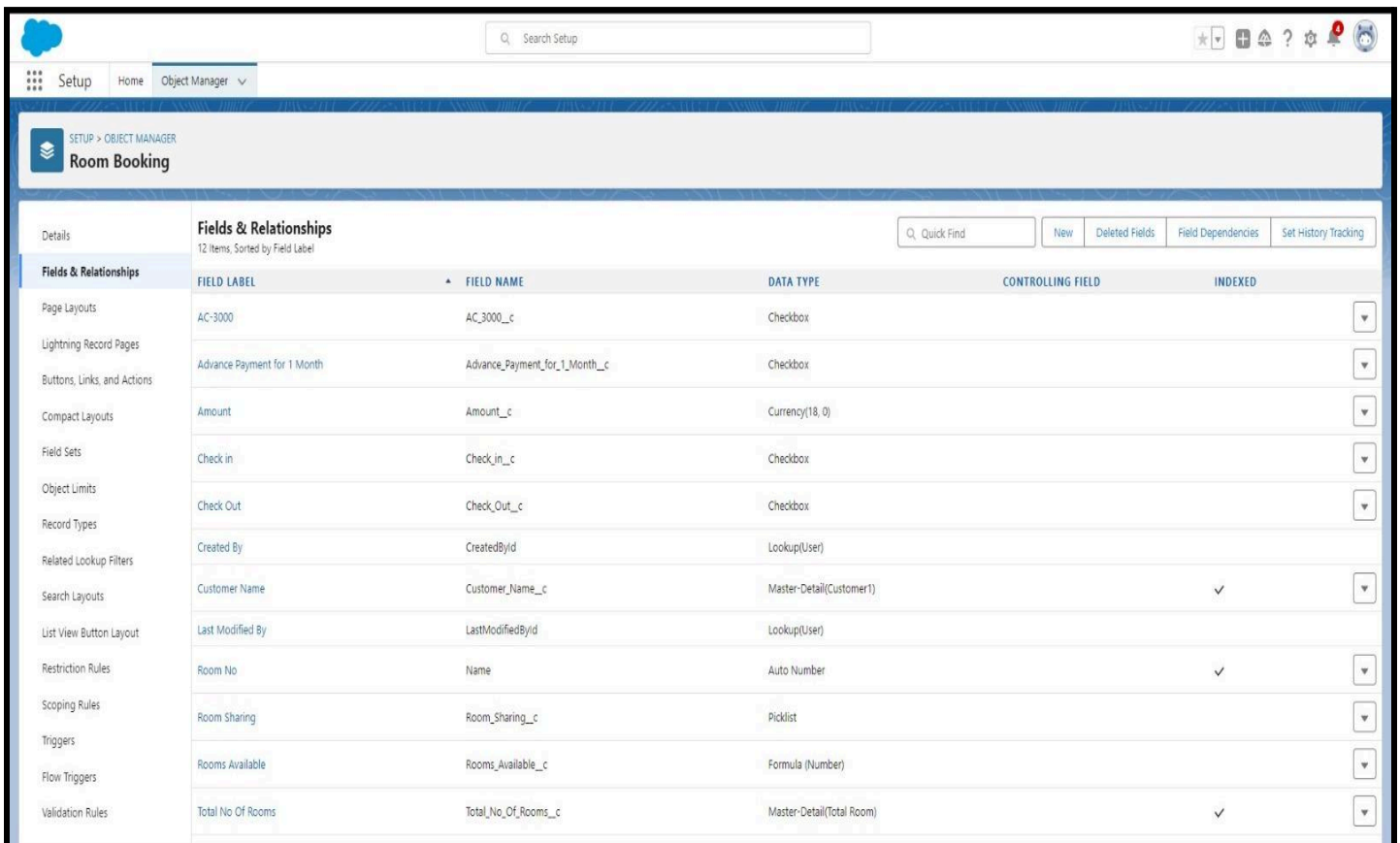
1. Go to setup > click on Object Manager > type object name(Rooms Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > click on New
3. Select Data type as a "Formula" and Click on Next
4. Fill the Above as following:
 - Field Label: **Rooms Available**
 - Field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



The screenshot shows the Salesforce Object Manager interface for the 'Room Booking' object. The 'Fields & Relationships' tab is active, displaying a list of 12 fields. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are: AC-3000, Advance Payment for 1 Month, Amount, Check in, Check Out, Created By, Customer Name, Last Modified By, Room No, Room Sharing, Rooms Available, and Total No Of Rooms.

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	AC-3000	AC_3000__c	Checkbox		
Lightning Record Pages	Advance Payment for 1 Month	Advance_Payment_for_1_Month__c	Checkbox		
Buttons, Links, and Actions	Amount	Amount__c	Currency(18, 0)		
Field Sets	Check in	Check_in__c	Checkbox		
Object Limits	Check Out	Check_Out__c	Checkbox		
Record Types	Created By	CreatedById	Lookup(User)		
Related Lookup Filters	Customer Name	Customer_Name__c	Master-Detail(Customer1)		✓
Search Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Restriction Rules	Room No	Name	Auto Number		✓
Scoping Rules	Room Sharing	Room_Sharing__c	Picklist		
Triggers	Rooms Available	Rooms_Available__c	Formula (Number)		
Flow Triggers	Total No Of Rooms	Total_No_Of_Rooms__c	Master-Detail(Total Room)		✓

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

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

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

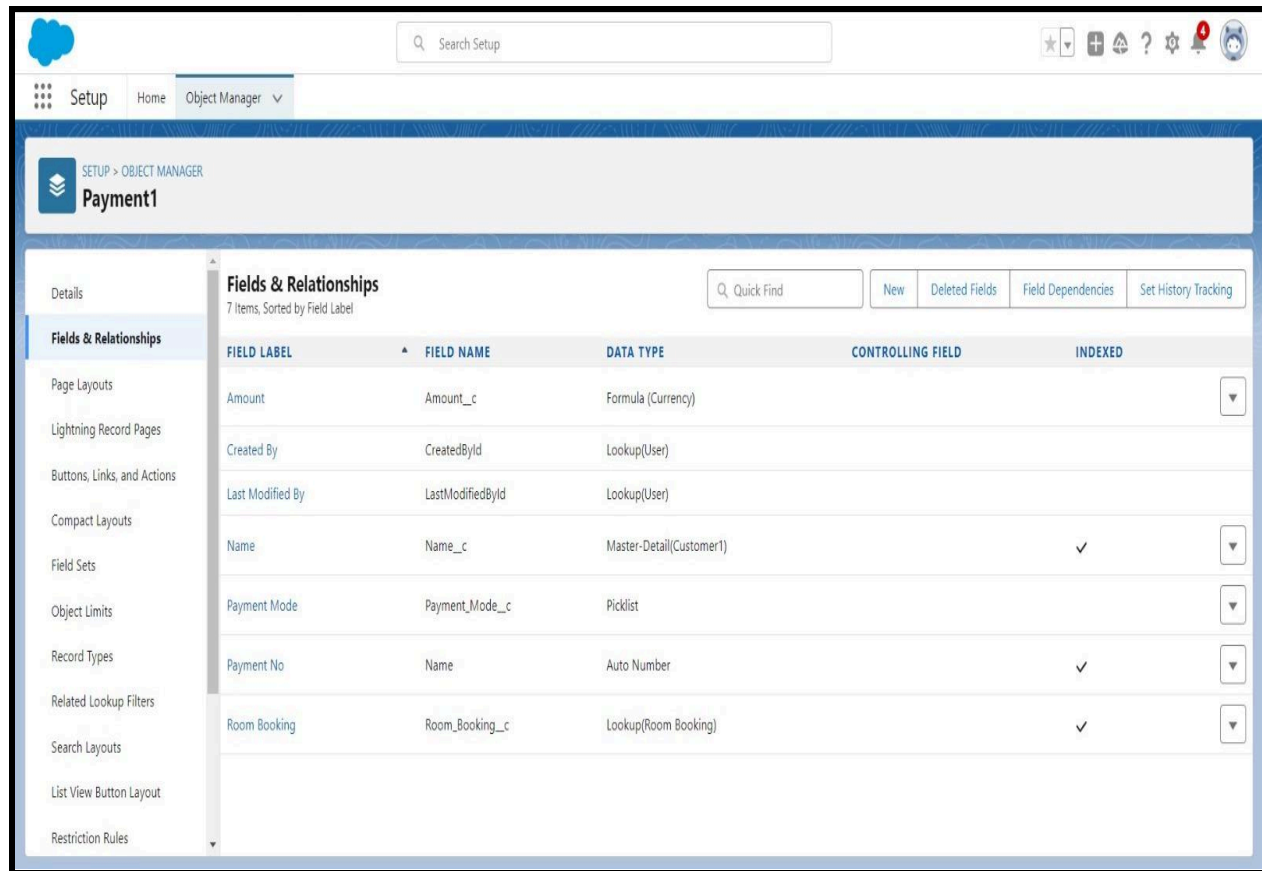
3. Creation of another fields for the Payment1 object

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” > click on 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.

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

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

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” > click on 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

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
 - Now click on “Fields & Relationships” > click on New
2. Select Data Type as a “Picklist”
3. Fill the Above as following:
 - Field Label: **Select Breakfast**
 - Under Value - Enter values, with each value separated by a new line
 - Idli
 - Bonda
 - Dosa
 - Upma
 - Vada
 - Puri
 - Chapati
 - Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.

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 does 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” > click on 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” > click on 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” > click on 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” > click on New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: **Select Dinner**
5. 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
6. Select Checkbox Use First value as default Value
7. Click on Next > Next > Save and new.

To create a Field dependencies for Dinner and Select Dinner.

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

- 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.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Breakfast	Breakfast__c	Picklist		
Created By	CreatedById	Lookup(User)		
Dinner	Dinner__c	Picklist		
Food Selection No	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Lunch	Lunch__c	Picklist		
Name	Name__c	Master-Detail(Customer1)		✓
Select Breakfast	Select_Breakfast__c	Picklist	Breakfast	
Select Dinner	Select_Dinner__c	Picklist	Dinner	
Select Lunch	Select_Lunch__c	Picklist	Lunch	

- **Creation Of Fields For The Feedback Object:**

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

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” > click on New
3. Select Data Type as a “Picklist”
4. Click on Next
5. Fill the Above as following:
 - Field Label: **Room Cleaning**
 - 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 the search bar > click on the object.
2. Now click on “Fields & Relationships” > click on 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 the search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Picklist”
4. Click on Next
5. Fill the Above as following:
 - Field Label: **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” > click on 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.

The screenshot shows the Salesforce Setup interface for the 'Feedback' object. The 'Fields & Relationships' tab is selected, displaying a table of 9 fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (Lookup(User)), Feedback No (Auto Number), Food (Picklist), Internet (Picklist), Last Modified By (Lookup(User)), Name (Lookup(Customer1)), Owner (Lookup(User,Group)), Roomcleaning (Picklist), and Suggestion (Text Area(255)).

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

- **Creation Of Fields For The Total Rooms 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” > click on 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
9. Note: I am Considering “Total No Of Rooms = 30” While creating a new record in Total Rooms Object.
10. Click on the Advanced Formula “ **30 - Rooms_Booked__c** ” and Check Syntax
11. Click on Next > Next > Save and new.

The screenshot shows the Salesforce Setup interface for the 'Total Room' object. The 'Fields & Relationships' tab is selected, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By, Last Modified By, Owner, Rooms Available, Rooms Booked, and Total No Of Rooms.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rooms Available	Rooms_Available__c	Formula (Number)		
Rooms Booked	Rooms_Booked__c	Roll-Up Summary (COUNT Room Booking)		
Total No Of Rooms	Name	Text(80)		✓

Milestone – 06: Validation Rule

● 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 > click on 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 1 month)
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 > click on 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 “Checkbox should be checked”
6. Select error location as field(Check in)
7. Click on save.

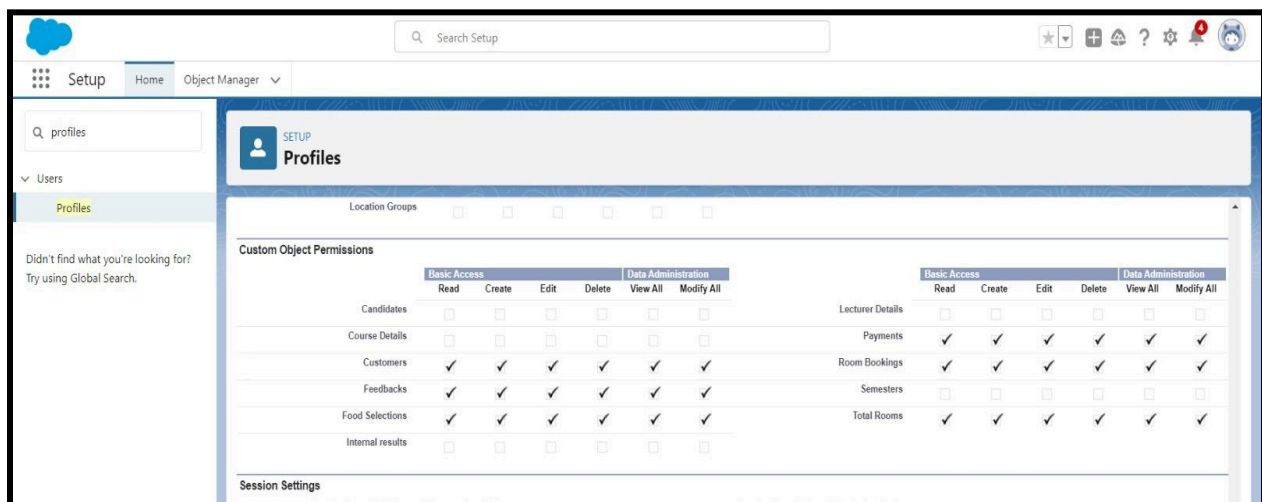
The screenshot displays the Salesforce Object Manager interface for the 'Room Booking' object. The left sidebar contains navigation options: Buttons, Links, and Actions; Compact Layouts; Field Sets; Object Limits; Record Types; and Related Lookup Filters. The main content area is titled 'Validation Rules' and shows a list of two rules. The first rule, 'checkbox_field', has an error location of 'Advance Payment for 1 Month' and an error message of 'Checkbox should be checked'. The second rule, 'check_in_rule', has an error location of 'Check in' and an error message of 'Check box should be checked'. Both rules are active and were modified by 'CHARAN KUMAR M' on 07/04/2024.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
checkbox_field	Advance Payment for 1 Month	Checkbox should be checked	✓	CHARAN KUMAR M, 07/04/2024, 2:12 pm
check_in_rule	Check in	Check box should be checked	✓	CHARAN KUMAR M, 07/04/2024, 2:14 pm

Milestone – 07: Profile

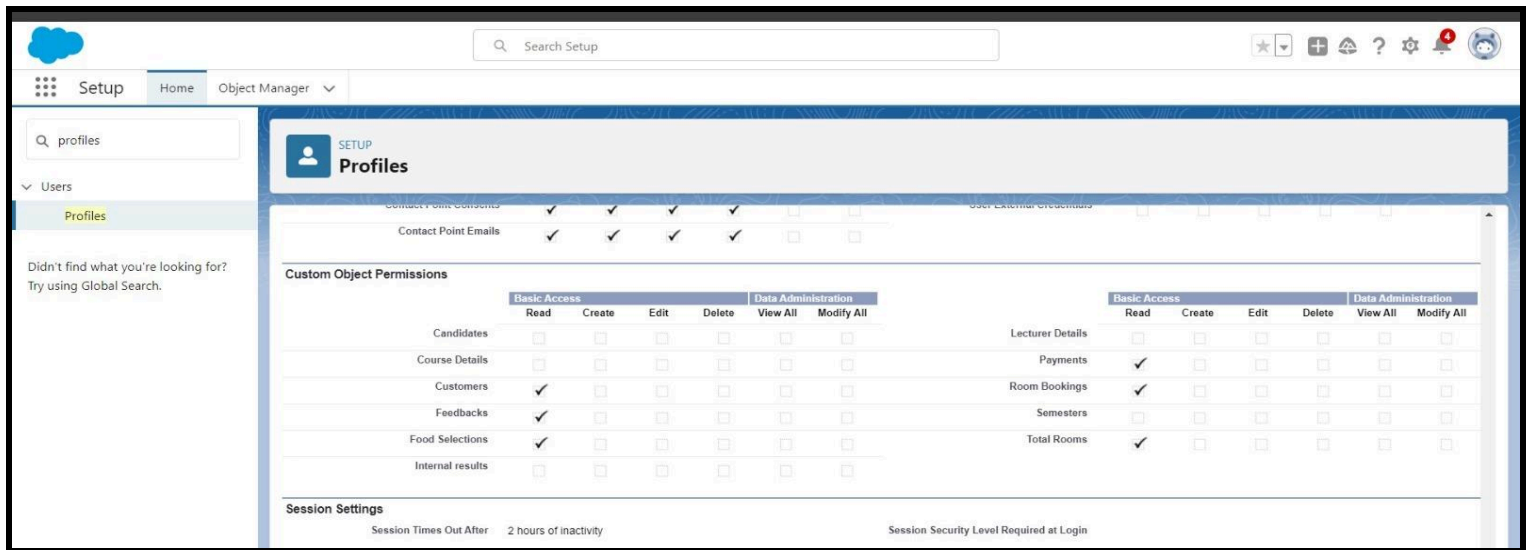
- **Custom User Profile:**

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**) > click on 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.



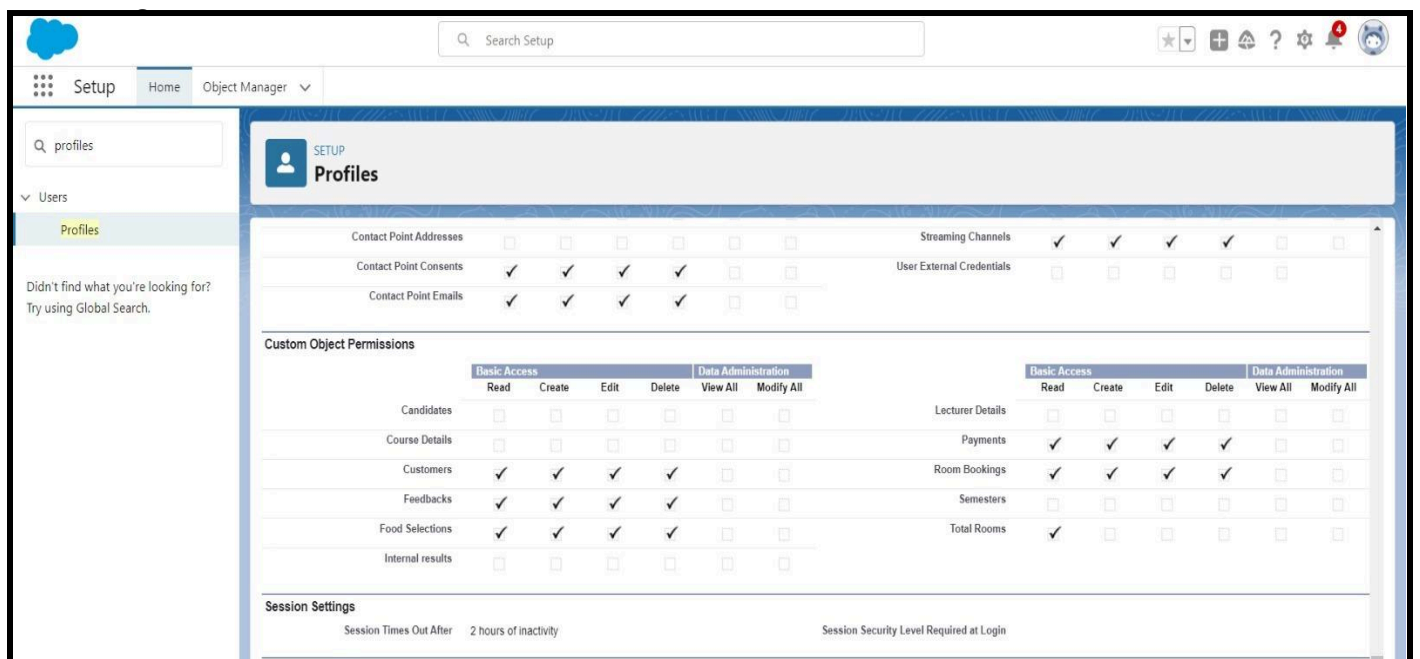
- **Custom Platform User1:**

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.



● **Custom Platform User2:**

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) > click on 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.



Milestone – 08: Roles

● 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.

The screenshot shows the Salesforce Setup Roles page for the 'Marketing' role. The left sidebar contains navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area displays the role details for 'Marketing'. Below the role name, there is a list of users assigned to this role, including 'Abhilash garapati'. The role details section shows the role name as 'Marketing', the role name as displayed on reports as 'CEO', and the role name as displayed on reports as 'Role, Role and Subordinates'. The role access section shows that users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases.

Action	Full Name	Alias	Username	Active
Edit	Abhilash garapati	agara	abhilash@agarapati.com	✓

● Receptionist Role:

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

The screenshot shows the Salesforce Setup Roles page for the 'Receptionist' role. The left sidebar contains navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area displays the role details for 'Receptionist'. Below the role name, there is a list of users assigned to this role, including 'Abhilash garapati'. The role details section shows the role name as 'Receptionist', the role name as displayed on reports as 'CEO', and the role name as displayed on reports as 'Role, Role and Subordinates'. The role access section shows that users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases.

Action	Full Name	Alias	Username	Active
Edit	Abhilash garapati	agara	abhilash@agarapati.com	✓

Milestone – 09:Users

- **Users:**

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 license : Salesforce
 - Profiles : Custom user
3. save.

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Users' and displays the 'User Detail' form for a user named 'sandeep gujja'. The form includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Role, User License, Profile, Active status, and various user permissions. The user is currently assigned the role of 'CEO' and the 'Salesforce' user license. The 'Active' checkbox is checked. The 'Profile' is set to 'Custom User'. The 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', and 'Debug Mode' checkboxes are all unchecked. The 'Delegated Approver' and 'Manager' fields are empty. The 'Receive Approval Request Emails' checkbox is checked, and the 'Only if I am an approver' option is selected. The 'Edit', 'Sharing', 'Reset Password', and 'Freeze' buttons are visible at the top of the form.

User Detail	
Name	sandeep gujja
Alias	sgujja
Email	mopurucharan234@gmail.com [Verify]
Username	gsandeep@sgujja.com
Nickname	sunny
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Role	CEO
User License	Salesforce
Profile	Custom User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	<input type="checkbox"/>
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>

- **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 license: Salesforce platform
- Profiles : Custom Platform User1

3. Save.

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains navigation options like Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area displays the 'User Detail' for 'Abhilash garapati'. The user's information is as follows:

User Detail	
Name	Abhilash garapati
Alias	agara
Email	mpourucharan234@gmail.com [Verify]
Username	abhilash@agarapati.com
Nickname	abhi
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Role	Marketing
User License	Salesforce Platform
Profile	Custom platform User1
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	<input type="checkbox"/>
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>

At the bottom, there is a checkbox for 'Receive Approval Request Emails' with the text 'Only if I am an approver'.

- **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 license: Salesforce Platform
 - Profiles : Custom Platform user2
3. Save

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Users' and displays the details for a user named 'Ganesh gelli'. The user details are organized into two columns. The left column contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, and Manager. The right column contains fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), and Debug Mode. The user is currently active and has the role of Receptionist. The user license is Salesforce Platform and the profile is Custom platform User2. The user's email is ganesh@gelli.com and the username is ganesh@gelli.com. The user's nickname is gani. The user's time zone is (GMT+05:30) India Standard Time (Asia/Kolkata). The user's locale is English (India) and the language is English. The user's delegated approver is set to 'Only if I am an approver'. The user's manager is set to 'Only if I am an approver'. The user's accessibility mode is set to 'Classic Only' and the debug mode is set to 'Off'.

Setup
Home
Object Manager

Users

User: Ganesh gelli

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

Edit | Sharing | Reset Password | Freeze

Name	Ganesh gelli	Role	Receptionist
Alias	ggelli	User License	Salesforce Platform
Email	ganesh@gelli.com	Profile	Custom platform User2
Username	ganesh@gelli.com	Active	<input checked="" type="checkbox"/>
Nickname	gani	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i

Milestone – 10:User Adoption

● 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

The screenshot shows a web application interface with a 'New Customer' modal form. The form is titled 'New Customer1' and contains several input fields for customer information. The background shows a sidebar with a 'Customers' tab and a list of recently viewed customers.

Form Fields:

- * Customer Name: hinata
- Phone no: 9874563210
- Email: hinata@gmail.com
- Permanent Address: Tamil nadu
- * Current Status: Others

Owner: CHARAN KUMAR M

Buttons: Cancel, Save & New, Save

● 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 'Customer1' details page for a customer named 'hinata'. The page displays various fields for customer information, including name, phone number, email, address, and status. It also shows the owner's name and the creation/modification dates. The right sidebar contains an 'Activity' section with filters and a list of upcoming and overdue activities.

Customer Details:

- Customer Name: hinata
- Phone no: 9874563210
- Email: hinata@gmail.com
- Permanent Address: Tamil nadu
- Current Status: Others

Owner: CHARAN KUMAR M

Created By: CHARAN KUMAR M, 08/04/2024, 7:01 pm

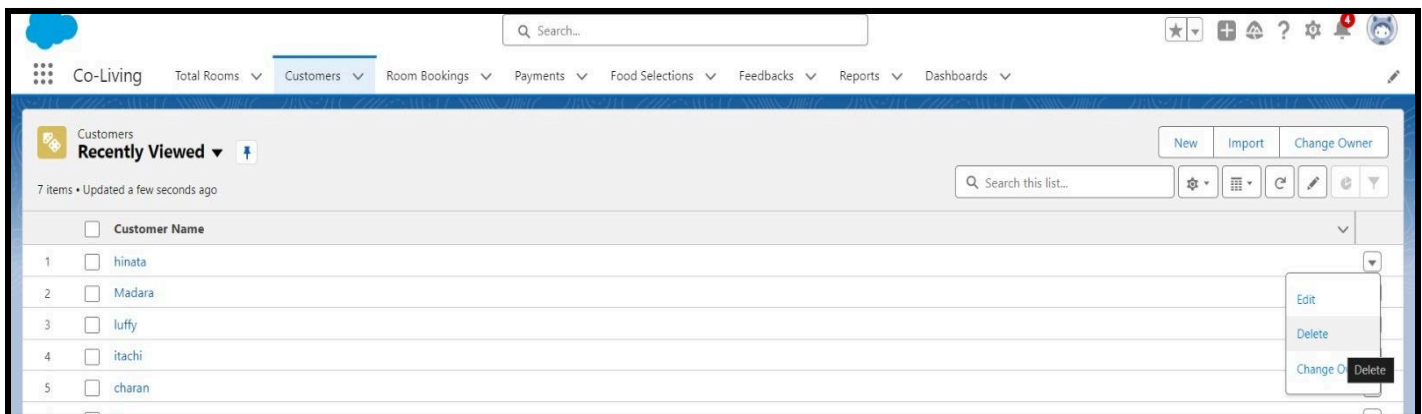
Last Modified By: CHARAN KUMAR M, 08/04/2024, 7:01 pm

Activity Section:

- Filters: All time • All activities • All types
- Refresh • Expand All • View All
- Upcoming & Overdue: No activities to show. Get started by sending an email, scheduling a task, and more.
- No past activity. Past meetings and tasks marked as done show up here.

- **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.



Milestone – 11: Reports

- **Create Report:**

1. Go to the app > click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel “**Customers with Room Bookings with Total Rooms**” > click on start report.
4. Customize your report
5. Add fields from left pane as shown below
6. Save or run it.

Co-Living

Search...

Reports

Report: Customers with Room Bookings and Total Rooms

Room Booking and Total Rooms

Enable Field Editing

Total Records: 6, Total Advance Payment for 1 Month: 6, Total AC-3000: 4, Total Amount: ₹3,23,055

Customer: Customer Name	Room Booking: Room No	Phone no	Email	Permanent Address	Current Status	Room Sharing	Advance Payment for 1 Month	AC-3000	Amount
charan (1)	RN-003	9866539131	charan@gmail.com	Chennai	Employee	Triple sharing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	₹77,000
Subtotal							1	0	₹77,000
itachi (1)	RN-002	9110792333	itachi@gmail.com	Andhra Pradesh	Others	Double sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹55,000
Subtotal							1	1	₹55,000
luffy (1)	RN-001	9885049131	luffy@gmail.com	Kerala	Student	Single sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹28,000
Subtotal							1	1	₹28,000
Madara (1)	RN-006	9876543217	madara@gmail.com	Japan	Others	Double sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹30,000
Subtotal							1	1	₹30,000
mikey (1)	RN-005	7989041527	mikey@gmail.com	Banglore	Employee	Double sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹77,555
Subtotal							1	1	₹77,555
Zoro (1)	RN-004	8978867846	zoro@gmail.com	Hyderabad	Student	Single sharing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	₹55,500
Subtotal							1	0	₹55,500
Total (6)							6	4	₹3,23,055

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

● 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.

Co-Living

Search...

Reports

Report: Customers with Payments and Room Booking

Room booking with Payments

Enable Field Editing

Total Records: 5, Total Room Booking: Advance Pay...: 5, Total Room Booking: AC-3000: 3, Total Amount: ₹2,93,055.00

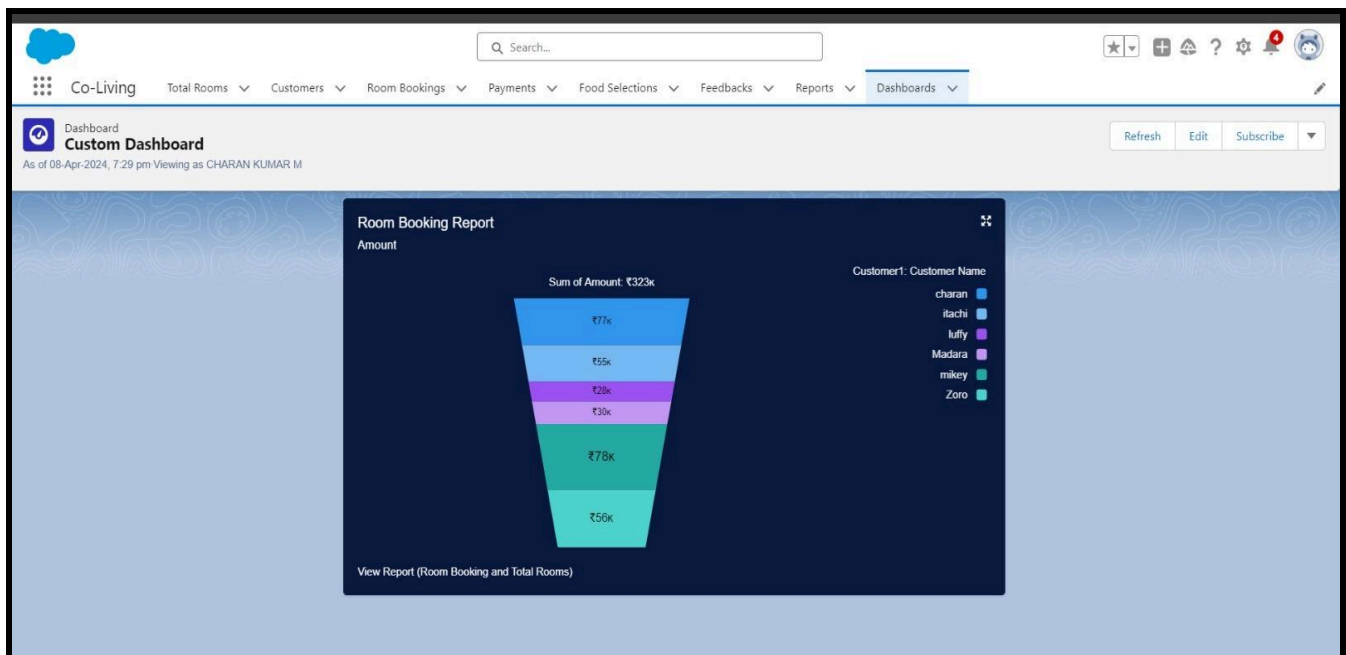
Customer: Customer Name	Room Booking: Room No	Payment Mode	Phone no	Email	Permanent Address	Current Status	Room Booking: Room Sharing	Room Booking: Advance Payment for 1 Month	Room Booking: AC-3000	Amount
charan (1)	RN-003	Phonepe	9866539131	charan@gmail.com	Chennai	Employee	Triple sharing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	₹77,000.00
Subtotal								1	0	₹77,000.00
itachi (1)	RN-002	Credit card	9110792333	itachi@gmail.com	Andhra Pradesh	Others	Double sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹55,000.00
Subtotal								1	1	₹55,000.00
luffy (1)	RN-001	Cash	9885049131	luffy@gmail.com	Kerala	Student	Single sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹28,000.00
Subtotal								1	1	₹28,000.00
mikey (1)	RN-005	UPI	7989041527	mikey@gmail.com	Banglore	Employee	Double sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹77,555.00
Subtotal								1	1	₹77,555.00
Zoro (1)	RN-004	Paytm	8978867846	zoro@gmail.com	Hyderabad	Student	Single sharing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	₹55,500.00
Subtotal								1	0	₹55,500.00
Total (5)								5	3	₹2,93,055.00

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

Milestone – 12: Dashboards

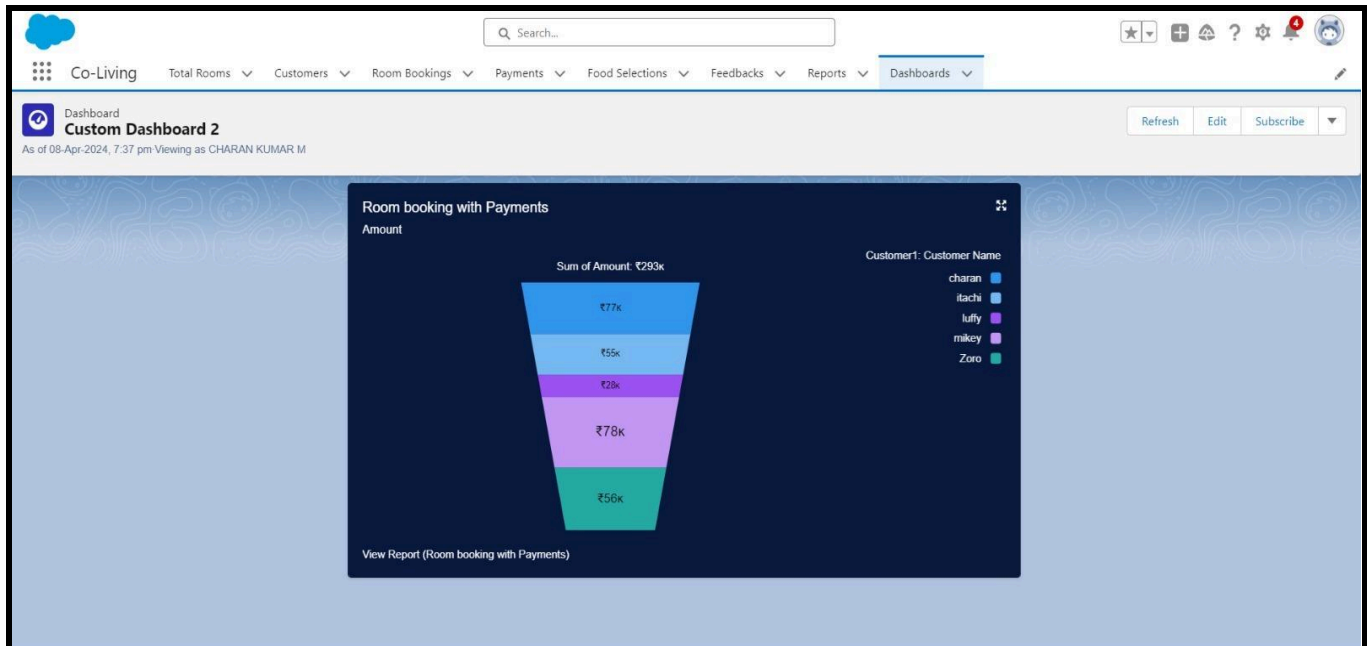
- **Create Dashboard:**

1. Go to the app > click on the Dashboard tabs and click on new Dashboard
2. Give a Name “ **Custom Dashboard**” And click on Create.
3. Select add component.
4. Select a Report **Room Booking and Total Rooms** and click on select.
5. Click Add then click on Save and then click on Done.



- **Create Another Dashboard:**

1. Go to the app > click on the Dashboard tabs and click on new Dashboard.
2. Give a Name “**Custom Dashboard2**” 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



Milestone – 12: Flows

- Create A Flow:

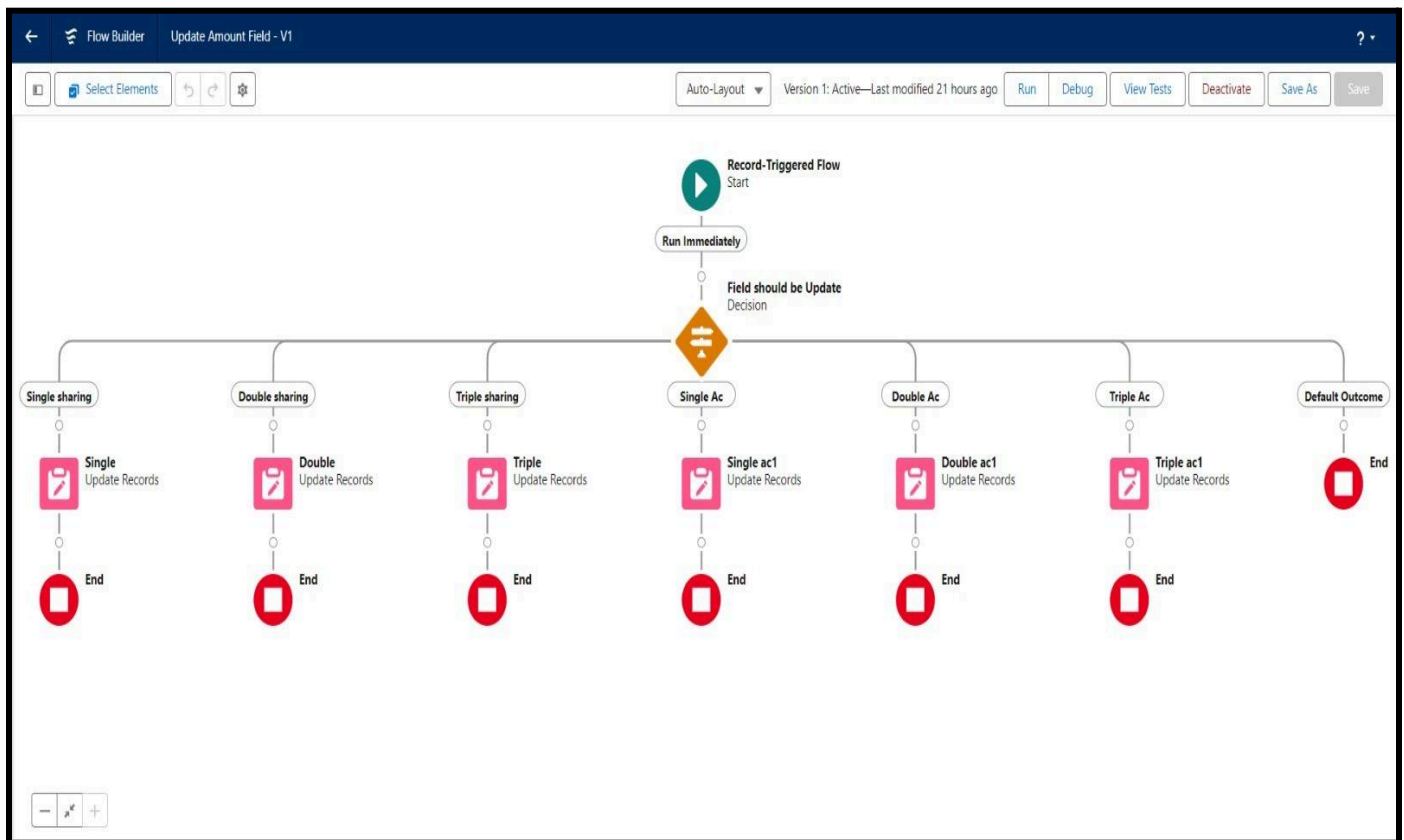
1. Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a Room Booking in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the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

- Operator: Select Equals.
 - Value: Select Single sharing.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on “+” Symbol In the Outcome Order.
9. Enter the Outcome Details Label: **Double sharing**, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Double sharing.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on “+” Symbol In the Outcome Order.
10. Enter the Outcome Details Label: **Triple sharing**, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Triple sharing.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on “+” Symbol In the Outcome Order.
11. Enter the Outcome Details Label: **Single Ac**, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Single sharing.
 - Click on “Add Condition”

- Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select True.
 - Click on “+” Symbol In the Outcome Order.
12. Enter the Outcome Details Label: **Double Ac**, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Double sharing.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select True.
 - Click on “+” Symbol In the Outcome Order.
13. Enter the Outcome Details Label: **Triple Ac**, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Triple sharing.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select True.
 - Click on Done.
14. Click on “+” Symbol under the single sharing and Select the “update Records” in the drop down list.
15. Enter the update records details
- Label: **Single**.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 28000.
 - Click on Done.

16. Enter the update records details
 - Label: **Double**.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 24000.
 - Click on Done.
17. Enter the update records details
 - Label: **Triple**.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 20000.
 - Click on Done.
18. Enter the update records details
 - Label: **Single ac1**.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 34000.
 - Click on Done.
19. Enter the update records details
 - Label: **Double ac1**.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.
 - Value: 30000.
 - Click on Done.
20. Enter the update records details
 - Label: **Triple ac1**.
 - API name: Gets automatically Generated.
 - Under the Set Field Values for the Room Booking Record.
 - Field: Amount.

- Value: 26000.
 - Click on Done.
21. The Flow will Form like This and Click on save.
 22. Enter the Flow Label: **Update Amount Field**, Flow API Name: Gets Automatically Generated and Click on Save.



• 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 Booking** 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
4. saving the record.

New Room Booking

* = Required Information

Information

* Customer Name: ace

Room No: RN-007

* Total No Of Rooms: RN-007

* Room Sharing: Double sharing

Amount: Amount not given

Buttons: Cancel, Save & New, Save

NOTE:

In the above data we didn't enter the amount in amount section. It will automatically populate the amount by triggering the flow that we created now. Then we can consider the flow is working properly as per the condition given.

Room Booking RN-007

Buttons: New Contact, Edit, New Opportunity

Related Details

Customer Name: ace

Room No: RN-007

Total No Of Rooms: RN-007

Rooms Available: 29

Room Sharing: Double sharing

Amount: ₹30,000

Created By: CHARAN KUMAR M, 08/04/2024, 8:04 pm

Last Modified By: CHARAN KUMAR M, 08/04/2024, 8:04 pm

Activity

Filters: All time • All activities • All types

Buttons: Refresh, Expand All, View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

We can see the amount is populated as per the condition given in flow.

THE END

