

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)**

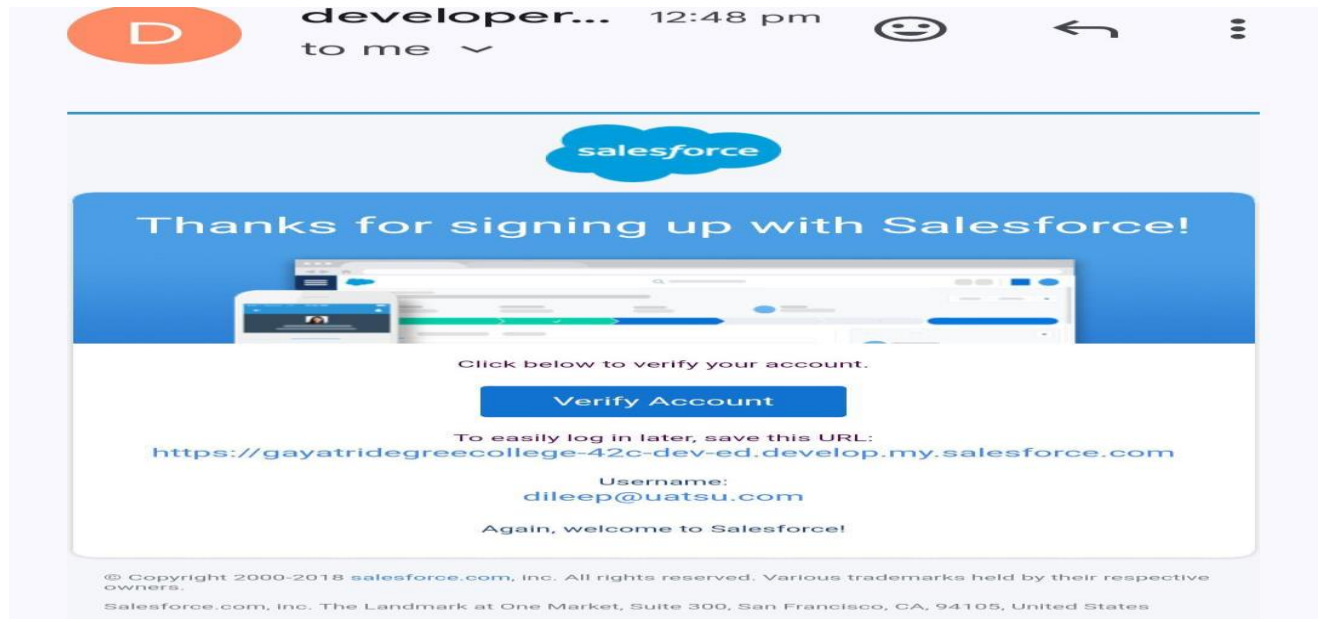
Click on sign up.

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

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

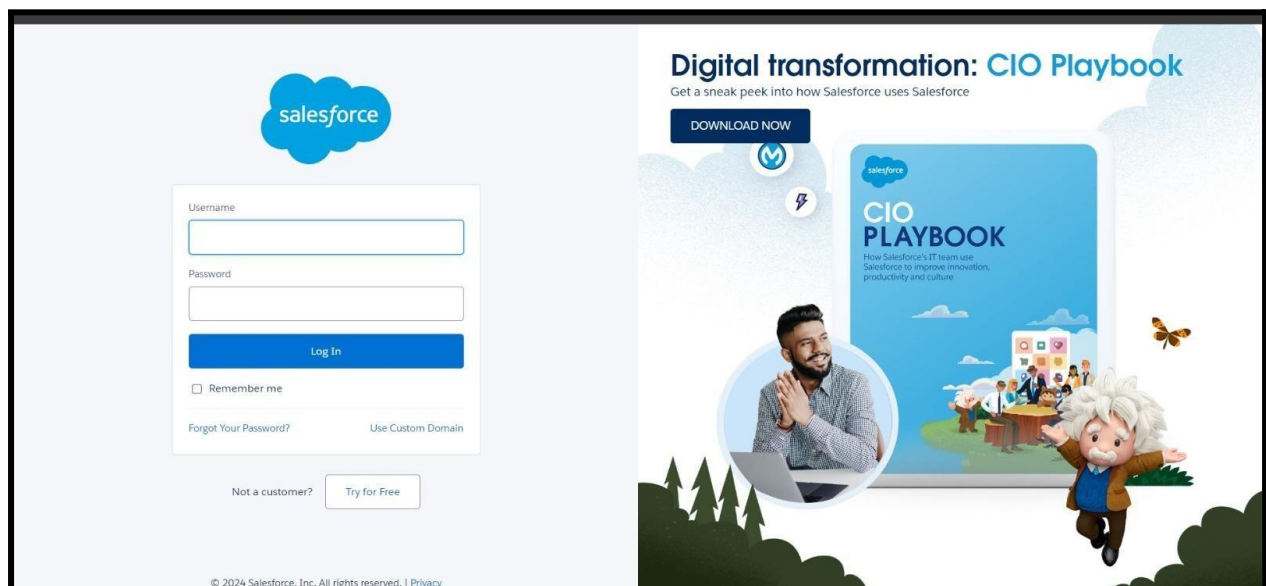
Account Activation:

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 Object Manager interface for a custom object named "Total Room". The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and various utility icons. Below the navigation bar, the "Object Manager" tab is selected, and the breadcrumb "SETUP > OBJECT MANAGER" is visible. The main header area displays the object name "Total Room". On the left, a sidebar menu 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 "Details" section is expanded, showing a list of fields and their properties. The fields listed are: Description, API Name (Total_Room__c), Custom (checked), Singular Label (Total Room), Plural Label (Total Rooms), and Enable Reports (checked). The "Optional Features" section is also expanded, showing a list of features and their status: Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The "Edit" and "Delete" buttons are visible in the top right corner of the details section.

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 shows the Salesforce Setup interface. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. The main header indicates 'SETUP > OBJECT MANAGER' and 'Customer1'. On the left, a sidebar lists various setup categories, with 'Details' selected. The main content area, titled 'Details', shows the configuration for the 'Customer1' object. It includes fields for Description, API Name (Customer1_c), Custom (checked), Singular Label (Customer1), and Plural Label (Customers). On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), and 'Deployment Status' (set to 'Deployed'). At the bottom right, there are 'Edit' and 'Delete' buttons. A link to 'Standard salesforce.com Help Window' is 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 displays the Salesforce Setup interface for a custom object named 'Room Booking'. The breadcrumb trail at the top reads 'SETUP > OBJECT MANAGER'. The left sidebar contains a list of configuration categories: 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 'Room Booking' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is expanded, showing the following fields:

Field	Value
Description	
API Name	Room_Booking__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Room Booking
Plural Label	Room Bookings
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 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 the custom object 'Payment1'. 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	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

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

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, specifically the Object Manager page for a custom object named "Food Selection". The breadcrumb trail at the top reads "SETUP > OBJECT MANAGER". The left sidebar contains a list of configuration categories: 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 "Edit" and "Delete" buttons. The configuration is organized into two columns. The left column contains: Description (empty), API Name (Food_Selection__c), Custom (checked), Singular Label (Food Selection), Plural Label (Food Selections), and Record Name (Food Selection No). The right column contains: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and a footer note "Standard salesforce.com Help Window".

Details	
Description	
API Name	Food_Selection__c
Custom	✓
Singular Label	Food Selection
Plural Label	Food Selections
Record Name	Food Selection No
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

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 main header area shows 'SETUP > OBJECT MANAGER' and the object name 'Feedback'. On the left, a sidebar lists various 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 a form with the following fields:

Details	
Description	
API Name	Feedback__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Feedback
Plural Label	Feedbacks
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	

At the top right of the details section, there are 'Edit' and 'Delete' buttons.

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 **Customers1,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'. Below this, there are two sections: 'Custom Object Tabs' and 'Web Tabs'. The 'Custom Object Tabs' section contains a table with columns for Action, Label, Tab Style, and Description. The table lists various objects and their corresponding tab styles. The 'Web Tabs' section shows a message: '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	

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.

Lightning App Builder | App Settings | Pages | Co-Living | ? Help

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

App Branding

Image

Upload

Primary Color Hex Value

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Co-Living

Lightning App Builder | App Settings | Pages | Co-Living | ? Help

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles

Navigation Items

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.

Available Items

Type to filter list...

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions

Selected Items

- Home
- Total Rooms
- Customers
- Room Bookings
- Payments
- Food Selections
- Feedbacks
- Reports
- Dashboards

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:

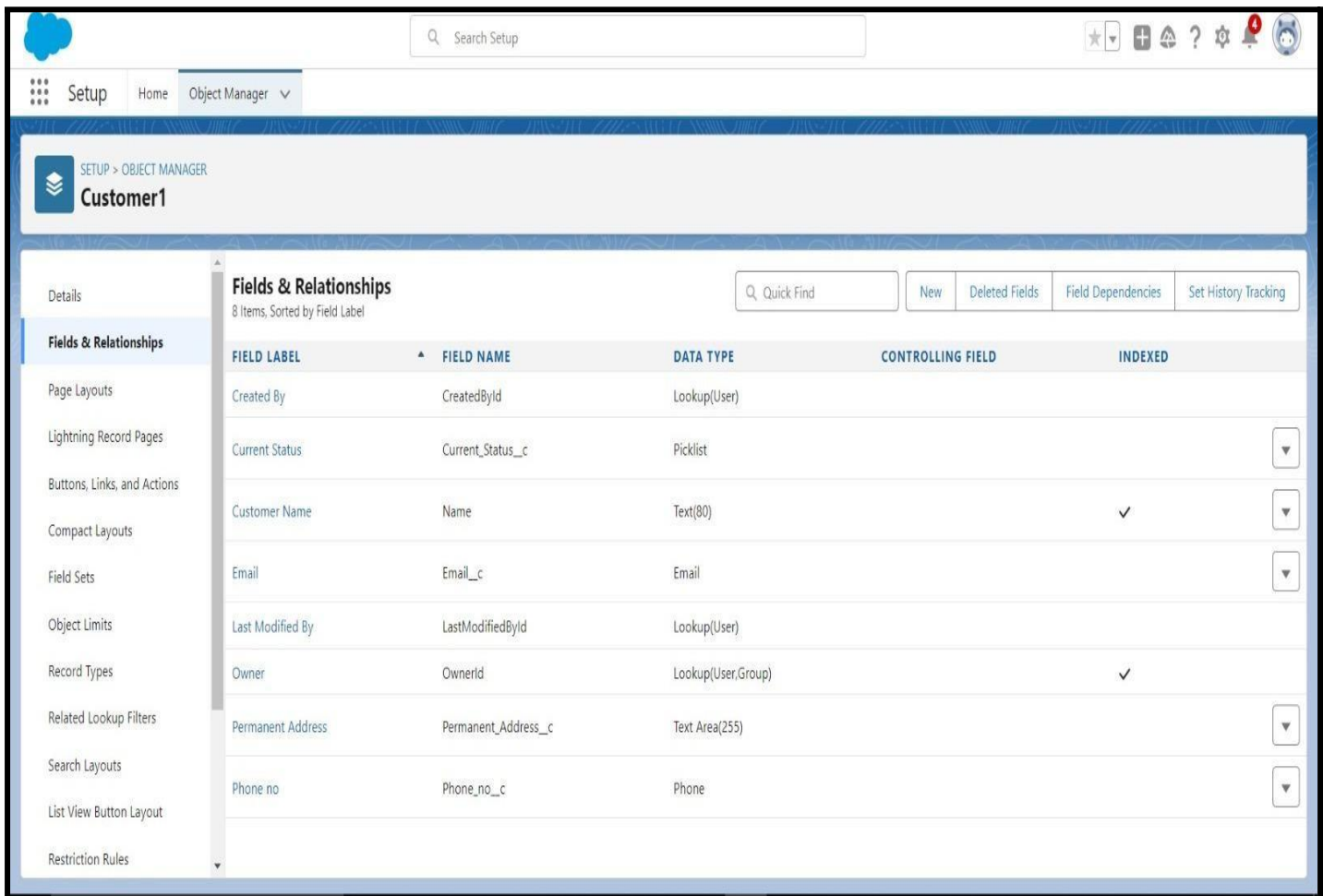
1. Go to setup > click on Object Manager > type object name(Customer1) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > click on New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
 - Field Label: **Email**
 - Field Name :It’s gets 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 fields listed are: Created By, Current Status, Customer Name, Email, Last Modified By, Owner, Permanent Address, and Phone no. The 'Current Status' field is highlighted, indicating it is the one being edited or viewed.

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	LastModifiedById	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:

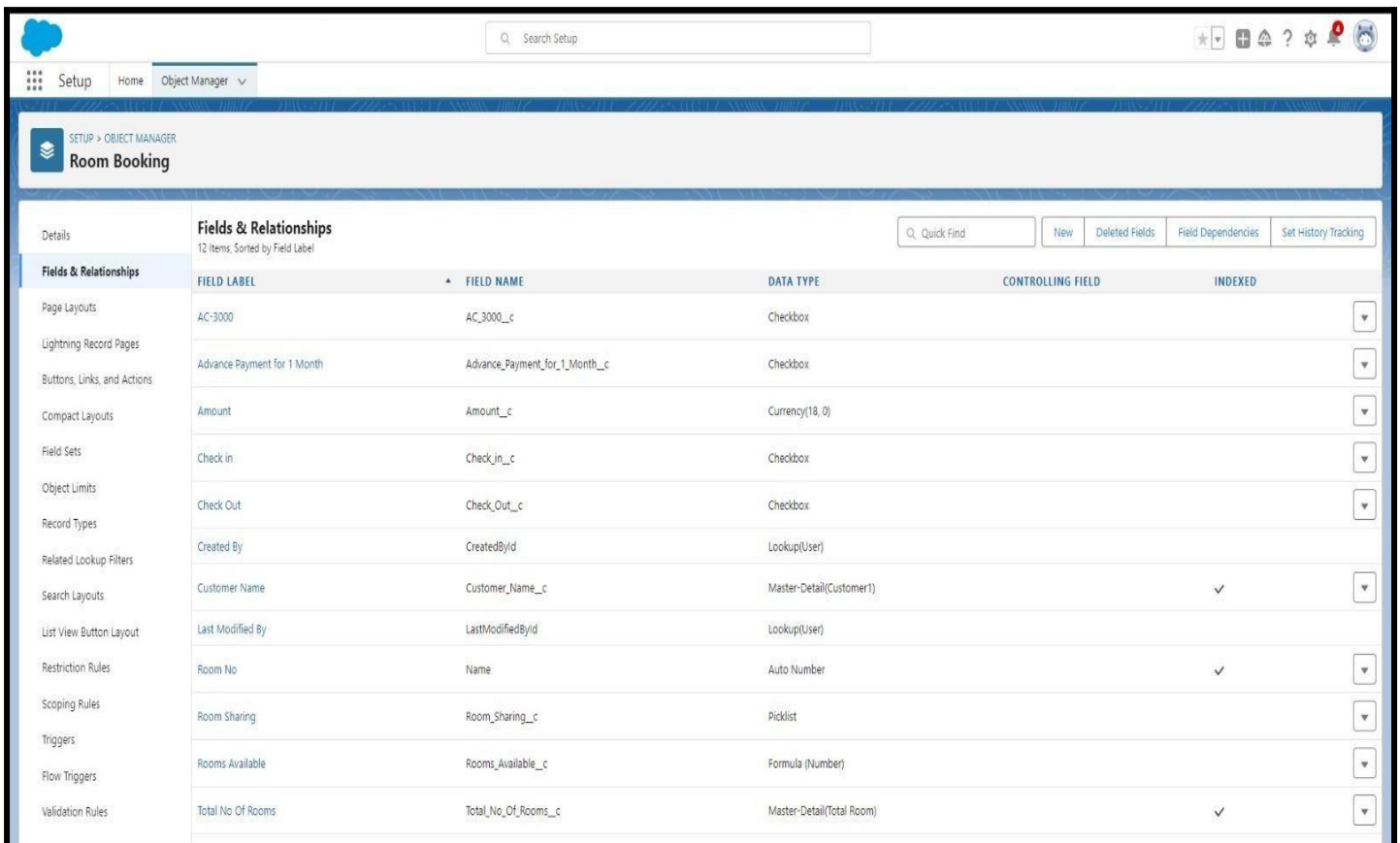
1. Go to setup > click on Object Manager > type object name(Rooms Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > click on New
3. Select Data type as a "Formula" and Click on Next
4. Fill the Above as following:
 - Field Label: **Rooms Available**
 - Field 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 fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
AC-3000	AC_3000__c	Checkbox		
Advance Payment for 1 Month	Advance_Payment_for_1_Month__c	Checkbox		
Amount	Amount__c	Currency(18, 0)		
Check in	Check_in__c	Checkbox		
Check Out	Check_Out__c	Checkbox		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Master-Detail(Customer1)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Room No	Name	Auto Number		✓
Room Sharing	Room_Sharing__c	Picklist		
Rooms Available	Rooms_Available__c	Formula (Number)		
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.

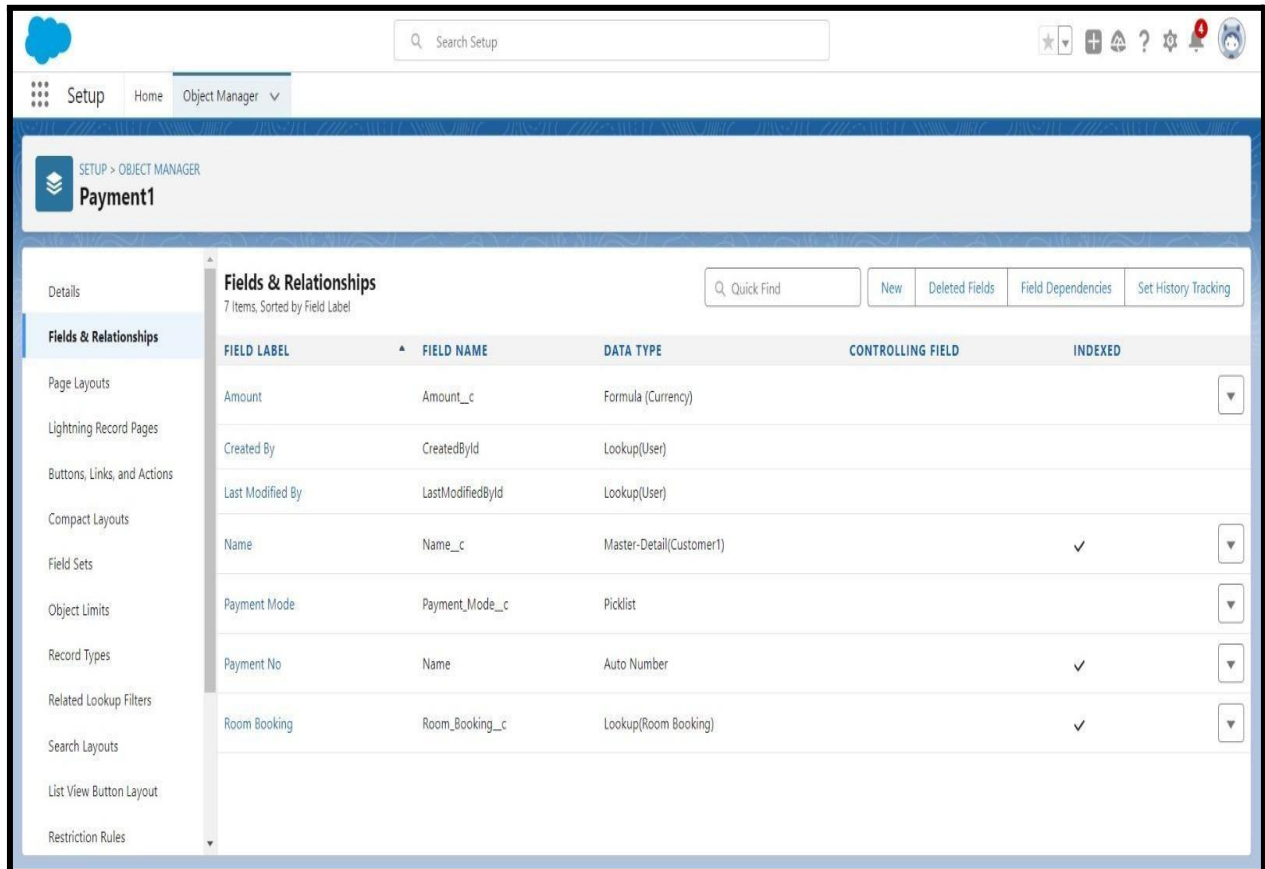
3. Creation of another fields for the Payment1 object

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.

The screenshot shows the Salesforce Setup interface for the 'Food Selection' object. The 'Fields & Relationships' tab is active, displaying a table of 10 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields are sorted by Field Label.

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

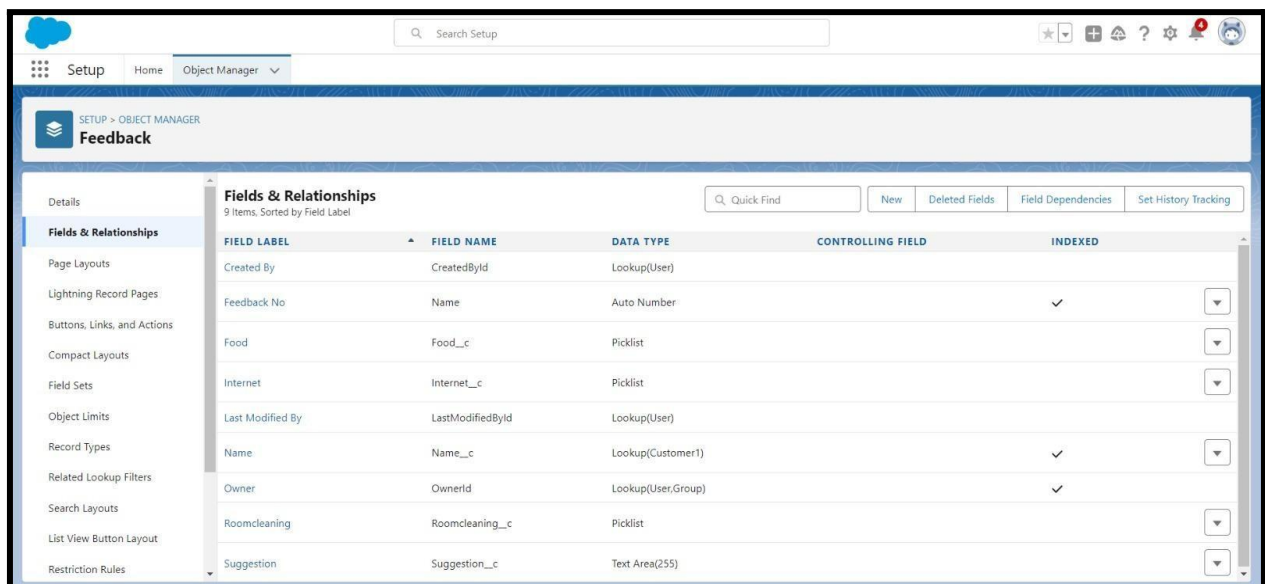
1. Go to setup > click on Object Manager > type object name(Feedback) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > click on New
3. Select Data Type as a "Picklist"
4. Click on Next
5. Fill the Above as following:
 - Field Label: **Internet**
 - Field Name :It's 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' section is active, displaying a table of 9 items. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The 'Food' field is highlighted in blue.

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.

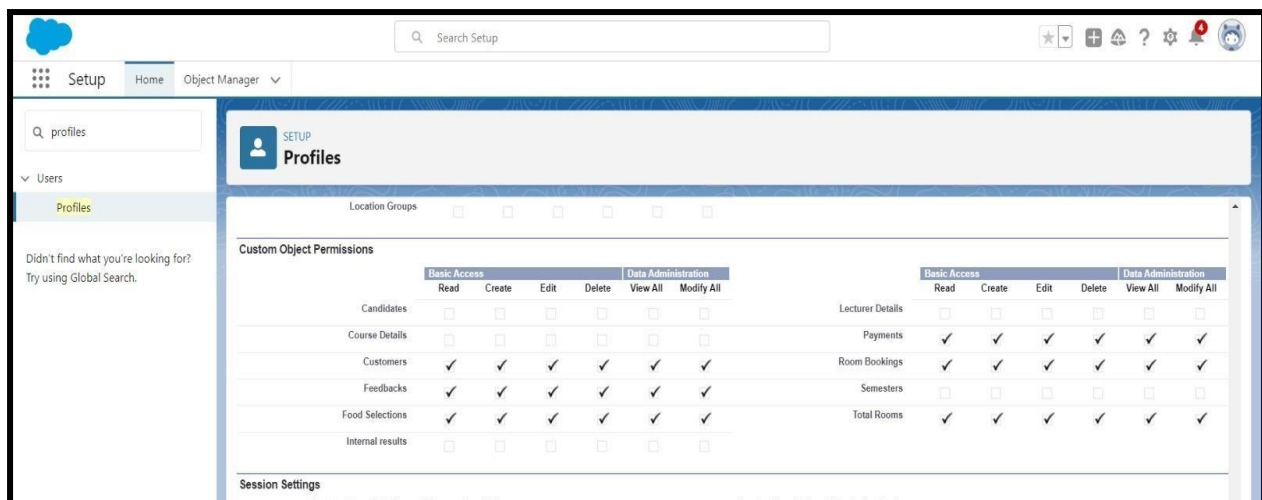
- **Create A Another Validation Rule To An Room Booking Object:**

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.

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.

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 Setup, Home, and Object Manager. The main content area displays the role details for 'Marketing'. Below the role name, there is a list of users assigned to this role. The role details section includes fields for Label, Role Name, Modified By, Opportunity Access, and Case Access. The Users in Marketing Role table lists the assigned users.

Action	Full Name	Alias	Username	Active
Edit	Abhishat garapati	apara	dileep@onduru.dileep1.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.
- 5.

The screenshot shows the Salesforce Setup Roles page for the Receptionist role. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the role details for 'Receptionist'. Below the role name, there is a list of users assigned to this role. The role details section includes fields for Label, Role Name, Modified By, Opportunity Access, and Case Access. The Users in Receptionist Role table lists the assigned users.

Action	Full Name	Alias	Username	Active
Edit	Ganesh gelli	gelli	dileep@onduru.dileep2.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. The left sidebar contains a search bar and a list of setup categories: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' category is selected. The main content area displays the 'User Detail' form for a new user named 'sandeep gujja'. The form includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Time Zone, Locale, Language, Delegated Approver, Manager, Role, User License, Profile, Active status, 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 'Role' is set to 'CEO', 'User License' is 'Salesforce', and 'Profile' is 'Custom user'. The 'Active' checkbox is checked. The 'Manager' field is set to 'Receive Approval Request Emails' with the note 'Only if I am an approver'. The 'Time Zone' is '(GMT+05:30) India Standard Time (Asia/Kolkata)' and the 'Locale' is 'English (India)'. The 'Language' is 'English'. The 'Delegated Approver' field is empty. The 'Manager' field is set to 'Receive Approval Request Emails' with the note 'Only if I am an approver'. The 'Accessibility Mode (Classic Only)' is set to 'Classic Only'. The 'Debug Mode' is set to 'Off'. The 'User Detail' form is titled 'User Detail' and includes buttons for 'Edit', 'Sharing', 'Reset Password', and 'Freeze'. The 'User Detail' form is titled 'User Detail' and includes buttons for 'Edit', 'Sharing', 'Reset Password', and 'Freeze'. The 'User Detail' form is titled 'User Detail' and includes buttons for 'Edit', 'Sharing', 'Reset Password', and 'Freeze'.

- **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. The left sidebar contains a search bar with 'users' entered and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'Users' and displays the details for a user named 'Abhilash garapati'. At the top, there are links for 'Edit', 'Sharing', 'Reset Password', and 'Freeze'. Below this, 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, and Accessibility Mode (Classic Only). The user is currently active and has the role of Marketing User.

User Detail	
Name	Abhilash garapati
Role	Marketing
Alias	agara
User License	Salesforce Platform
Email	dileectonduru.dti@gmail.com Verify
Profile	Custom platform User1
Username	dileectonduru.dti@dileep1.com
Active	<input checked="" type="checkbox"/>
Nickname	Abhi i
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)
Locale	English (India)
Language	English
Mobile Push Registrations	View
Delegated Approver	Data.com User Type i
Manager	Accessibility Mode (Classic Only) <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 : **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

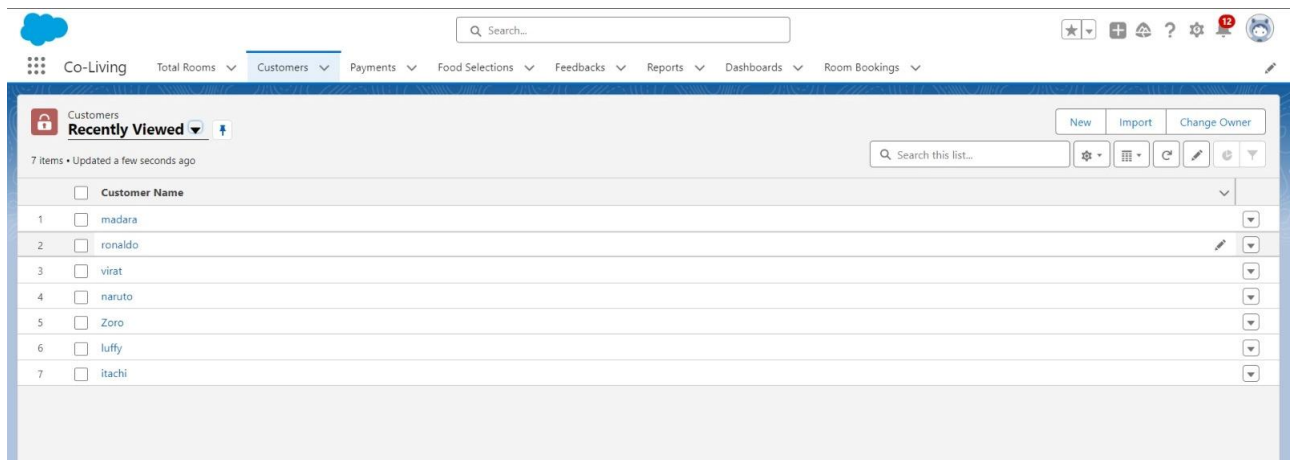
The screenshot shows the Salesforce Setup interface. On the left is a navigation sidebar with 'Users' selected. The main content area is titled 'Users' and shows the profile for 'Ganesh gelli'. Below the name are tabs for 'Permission Set Assignments: Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', 'Personal Groups', 'Public Group Membership', and 'Queue Membership'. The 'Permission Set Assignments: Activation Required' tab is active, showing a table of user settings.

Alias	ggelli	User License	Salesforce Platform
Email	dileptonduu.dti@gmail.com Verify	Profile	Custom platform User2
Username	dileptonduu.dti@dileep2.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

Milestone – 10:User Adoption

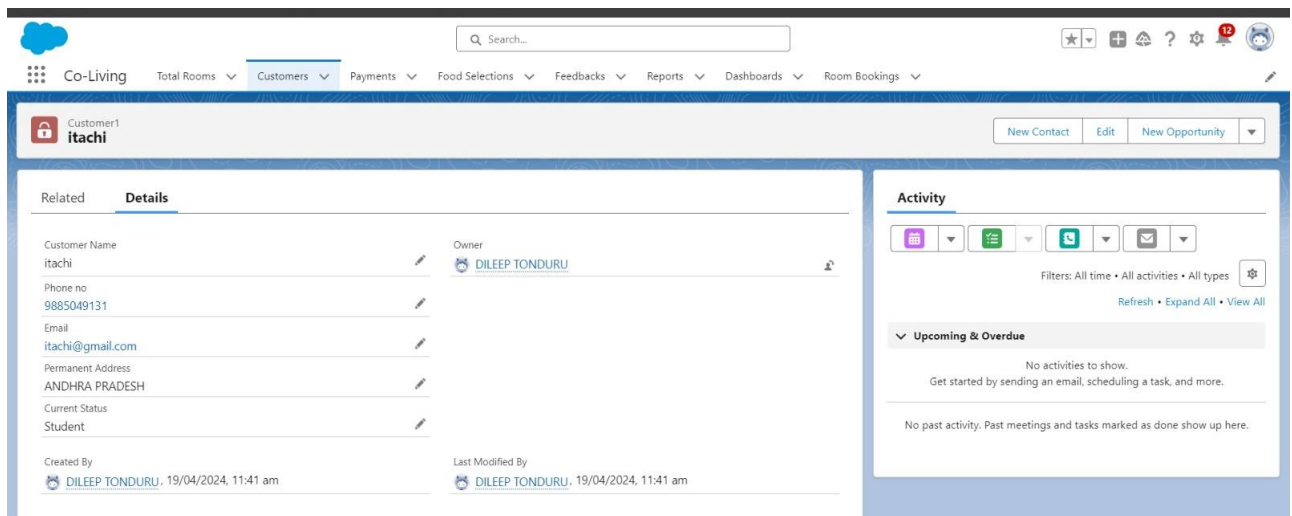
● Create A Record (Customers):

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



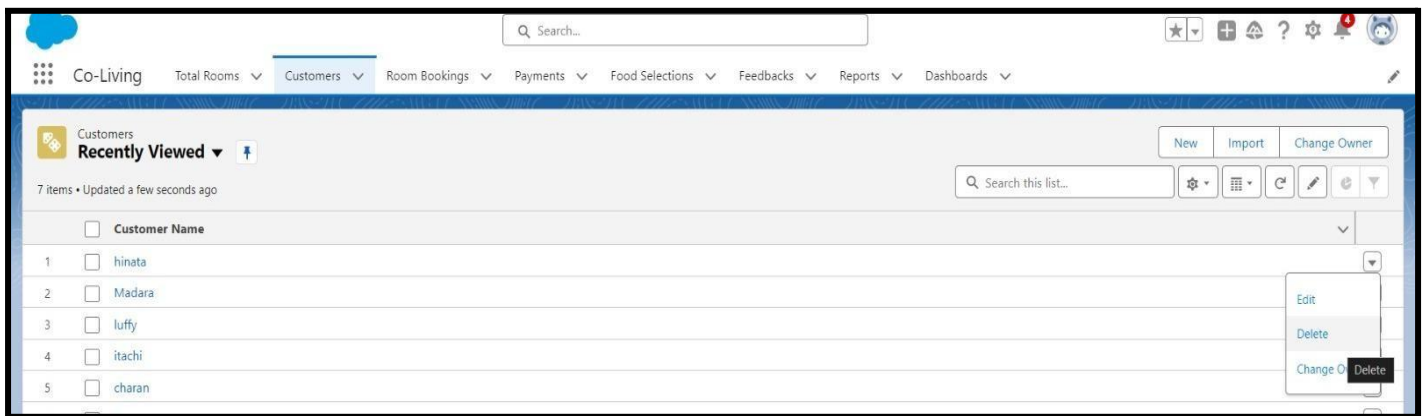
View A Record (Customers):

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.



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 Total Rooms Customers Room Bookings Payments Food Selections Feedbacks Reports Dashboards

Report: Customers with Room Bookings and Total Rooms
Room Booking and Total Rooms

Enable Field Editing Add Chart Edit

Total Records	Total Advance Payment for 1 Month	Total AC-3000	Total Amount
6	6	4	₹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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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 Total Rooms Customers Room Bookings Payments Food Selections Feedbacks Reports Dashboards

Report: Customers with Payments and Room Booking
Room booking with Payments

Enable Field Editing Add Chart Edit

Total Records	Total Room Booking: Advance Pay...	Total Room Booking: AC-3000	Total Amount
5	5	3	₹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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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

Customer1
itachi

Related **Details**

Customer Name
itachi

Phone no
9885049131

Email
itachi@gmail.com

Permanent Address
ANDHRA PRADESH

Current Status
Student

Owner
DILEEP TONDURU

Created By
DILEEP TONDURU, 19/04/2024, 11:41 am

Last Modified By
DILEEP TONDURU, 19/04/2024, 11:41 am

Activity

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.

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.

Dashboard
Custom Dashboard

As of 20-Apr-2024, 7:43 pm-Viewing as DILEEP TONDURU

Refresh Edit Subscribe

Room Bookings Report

Amount

Sum of Amount: ₹93k

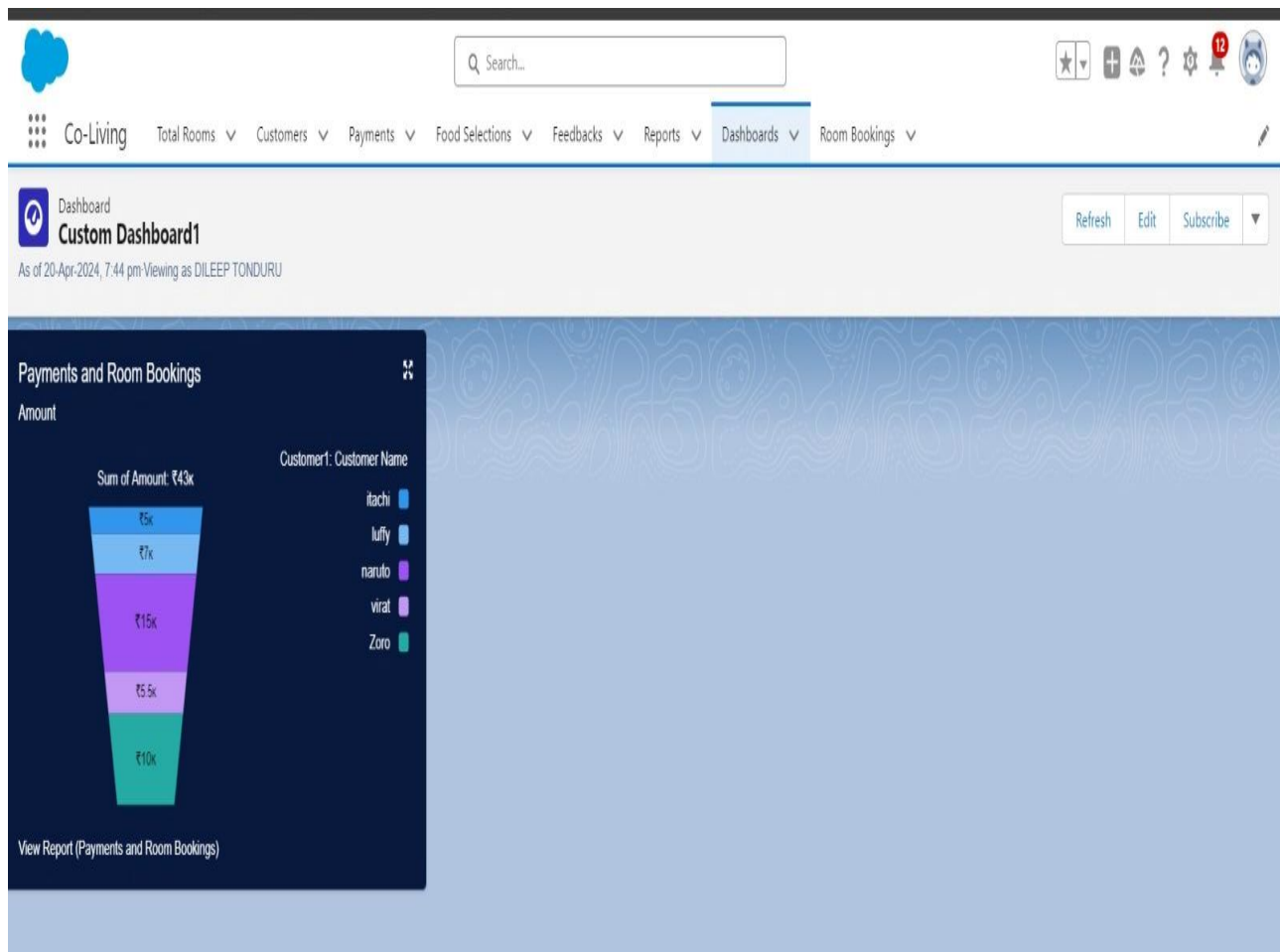
Customer1: Customer Name

- itachi
- luffy
- madara
- naruto
- ronaldo
- virat

View Report (Room Bookings and Total Rooms)

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:

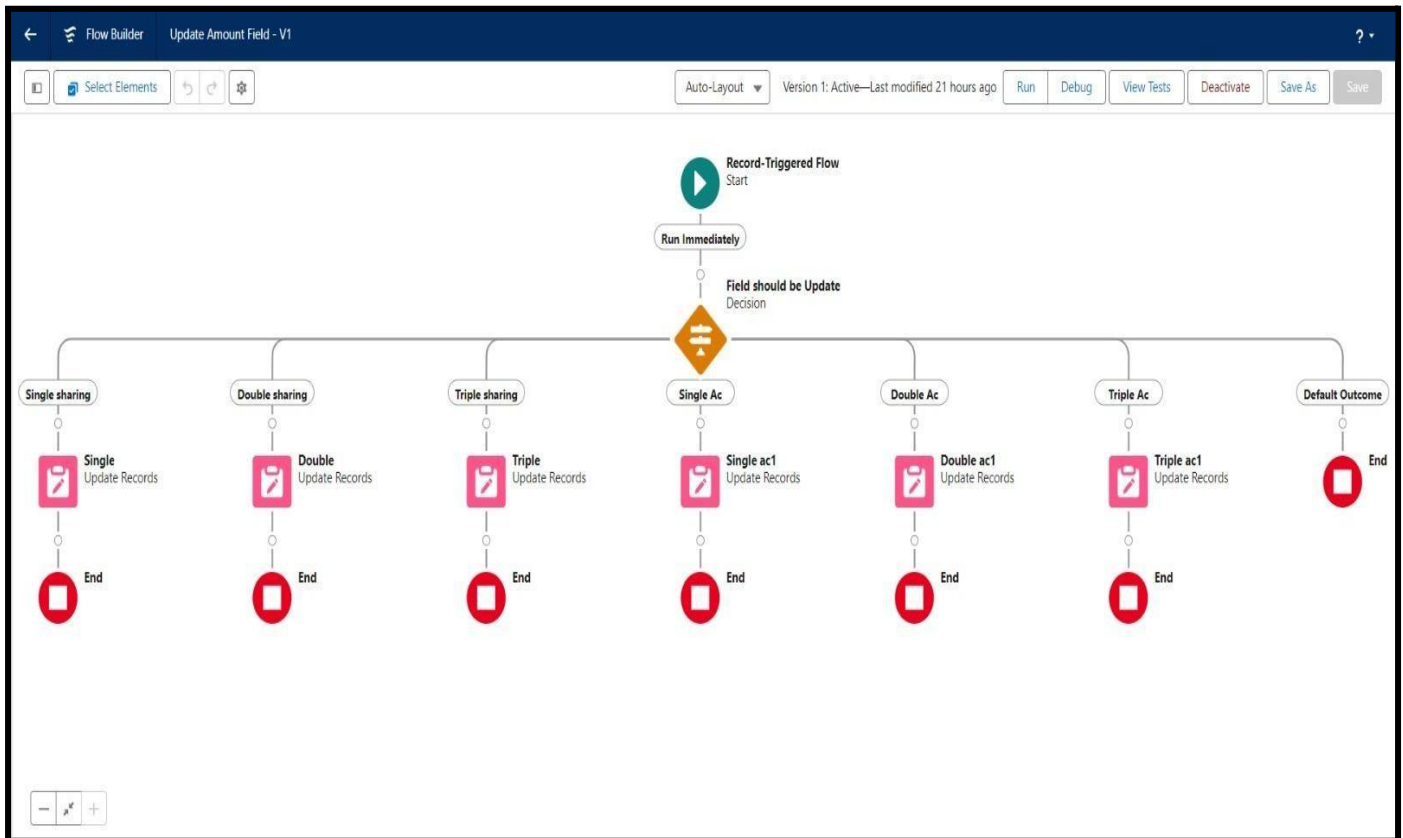
1. Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a Room Booking in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the 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

Background List:

Room No	Room No
1	RN-006
2	RN-005
3	RN-004
4	RN-003
5	RN-002
6	RN-001

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 7

Buttons: New Contact, Edit, New Opportunity

Details

Room No: 7

Room Sharing: Double sharing

Name: madara

Advance Payment for 1 Month: [checked]

Amount: ₹30,000

Total No Of Rooms: RN-007

Rooms Available: 29

Check in: [checked]

Check Out:

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

