

A CRM Application to Manage the Booking of Co-Living



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PROJECT ABSTRACT:

The Co-living Space project is focused on building a dynamic, inclusive community where individuals can live, work, and engage with like-minded people. We believe that shared living environments promote collaboration, reduce feelings of isolation, and significantly improve overall quality of life.

The space will feature a thoughtfully designed layout that strikes a balance between privacy and communal areas. The Co-living Space app will store customer details, allowing users to choose from various AC rooms with different sharing options. Users can select special meal options on a daily basis, make payments through multiple methods, and provide feedback on services like room cleanliness, internet connectivity, and food quality, among others.

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TASK 1 - Salesforce

Introduction :

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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

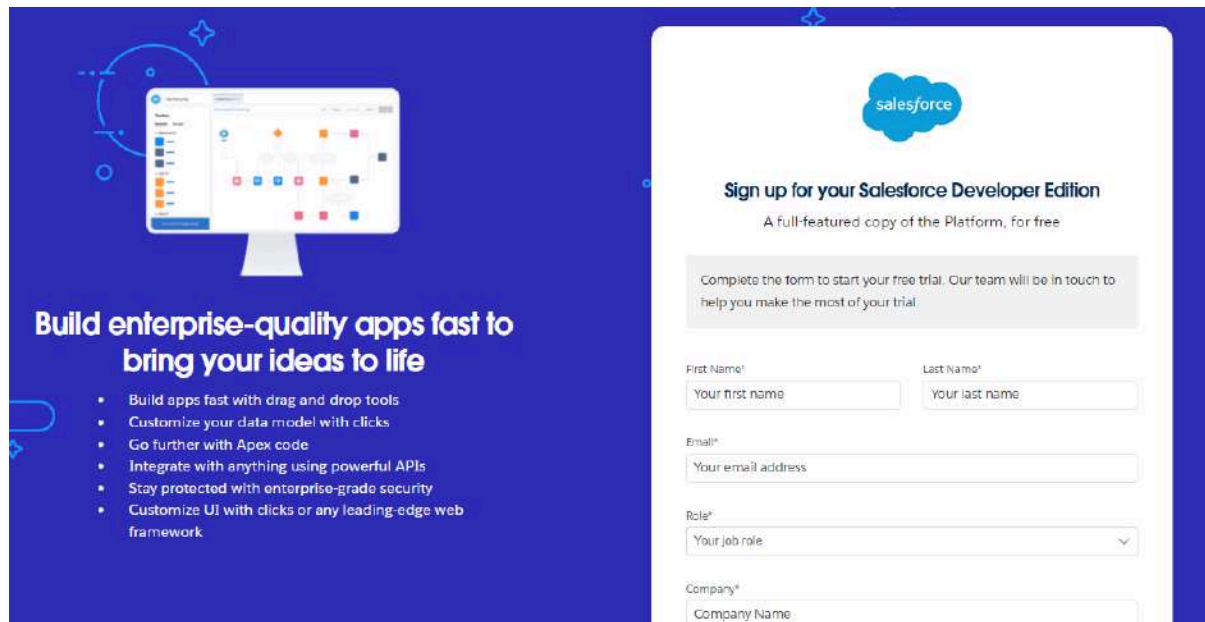
<https://youtu.be/r9EX3IGde5k>

Activity 1 :

Creating Developer Account

Creating a developer org in salesforce.

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



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

Username : should be a combination of your name and company

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

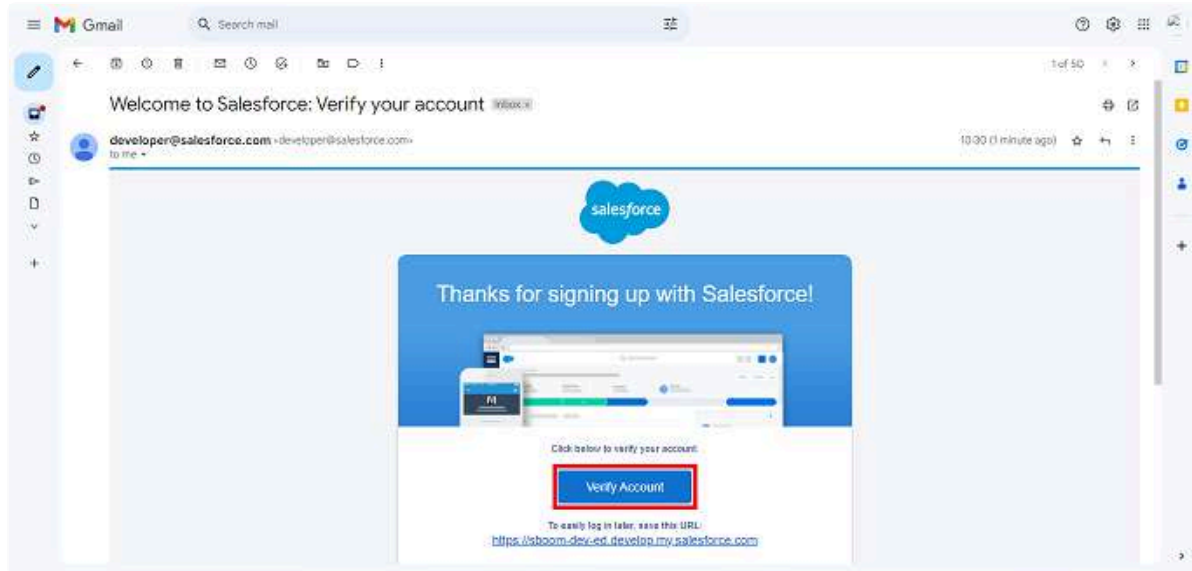
username@organization.com

Click on sign me up after filling these.

Activity 2 :

Account Activation

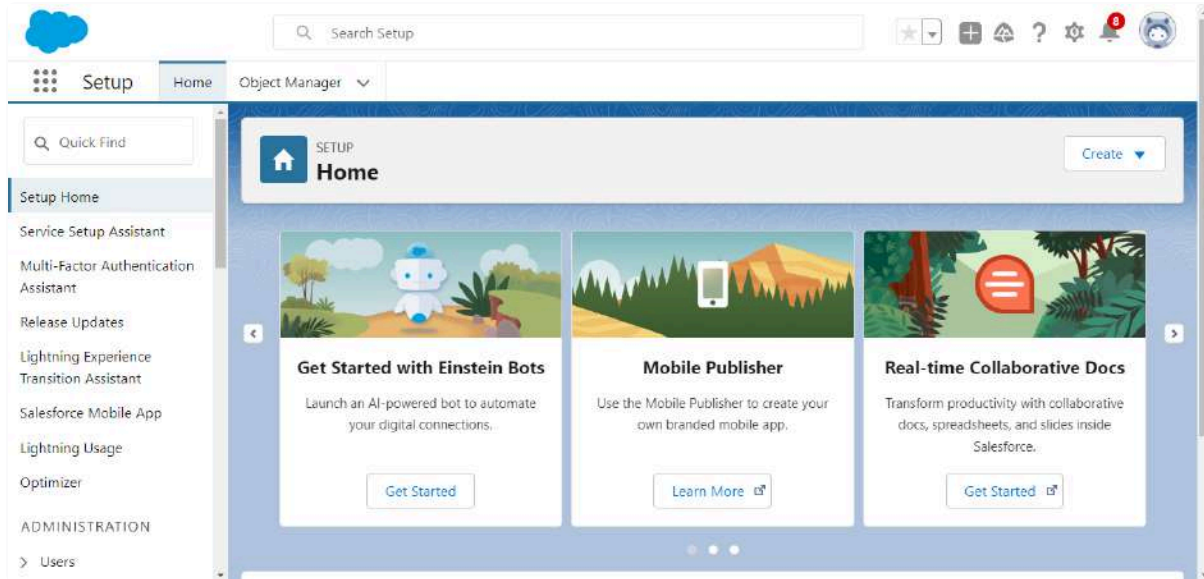
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account

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

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



Task 2 - Object

Introduction :

What Is an Object?

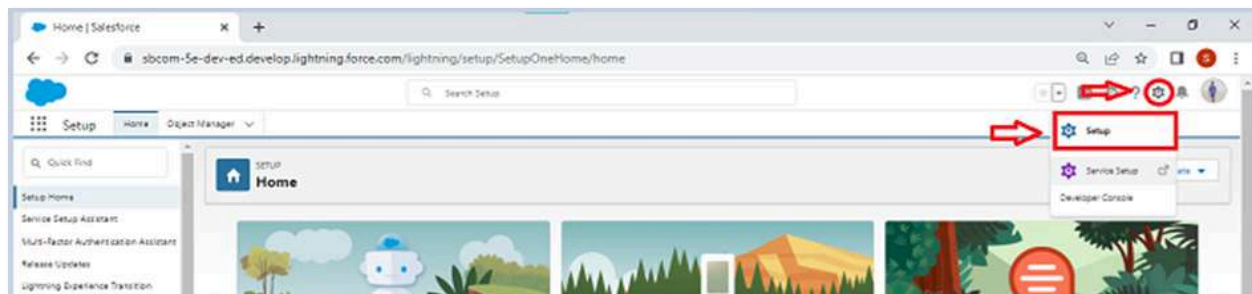
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

To Navigate to Setup page:

Click on gear icon ? click setup.



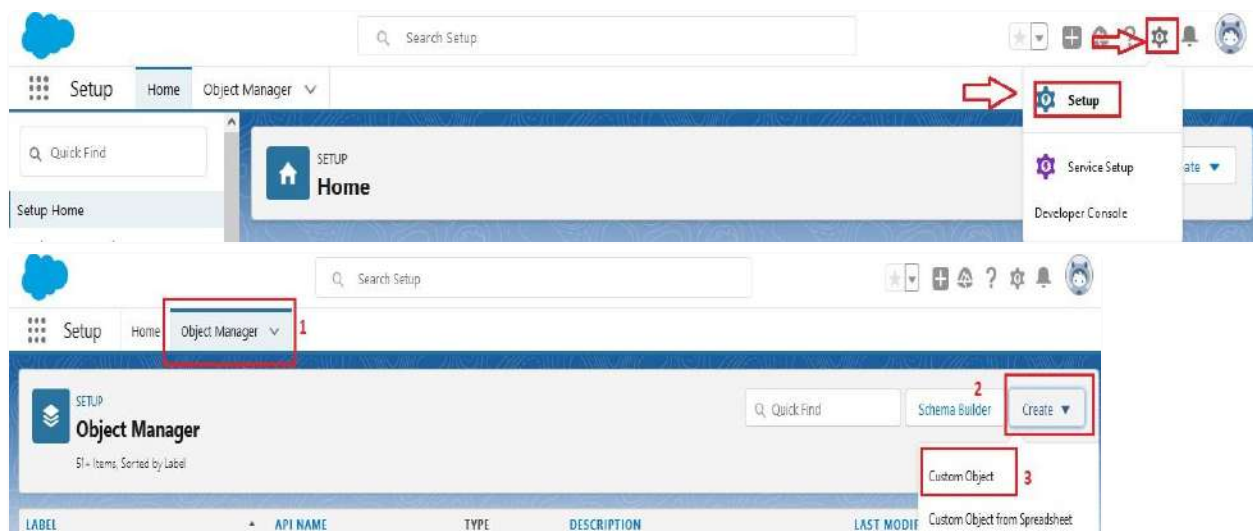
Objects and fields involved in Co-Living:



Activity 1 : Create a custom object for Total Rooms:

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.



3. Fill in the label as " Total Room ".
4. Fill in the plural label as " Total Rooms ".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".

7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information

The singular and plural labels are used in [page layouts, and reports](#).

Label: Example: Account **1**

Plural Label: Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referenced in [Visualforce and API](#).

Object Name: Example: Account **2**

Description:

Context Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, [page lists, related lists, lookups, and search results](#). For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name **3**

Date Type:

Optional Features

☒ Allow Reports **←**

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [...](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

☒ Allow Search **←**

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object.

[Save] [Save & New] [Cancel] **↑**

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

Activity 2 :

Create a custom object for Customer

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Customer1 ".
4. Fill in the plural label as " Customers ".

5. Record name: "Customer Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
11. Leave everything else as is, and click Save.

Activity 3 :

Create a custom object for Room Booking

To create a custom object, follow these steps:

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

Activity 4 :

Create a custom object for Payment

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.

3. Fill in the label as " Payment1".
4. Fill in the plural label as " Payments ".
5. Record name: "Payment No "
6. Select the data type as "Auto number ".
7. Under Display format enter PNO-{000}
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

Activity 5 :

Create a custom object for Food Selection

To create a custom object, follow these steps:

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

Activity 6 :

Create a custom object for Feedback

To create a custom object, follow these steps:

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

Task 3 - Tab

Introduction :

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

Types of Tabs:

1. Custom Tabs

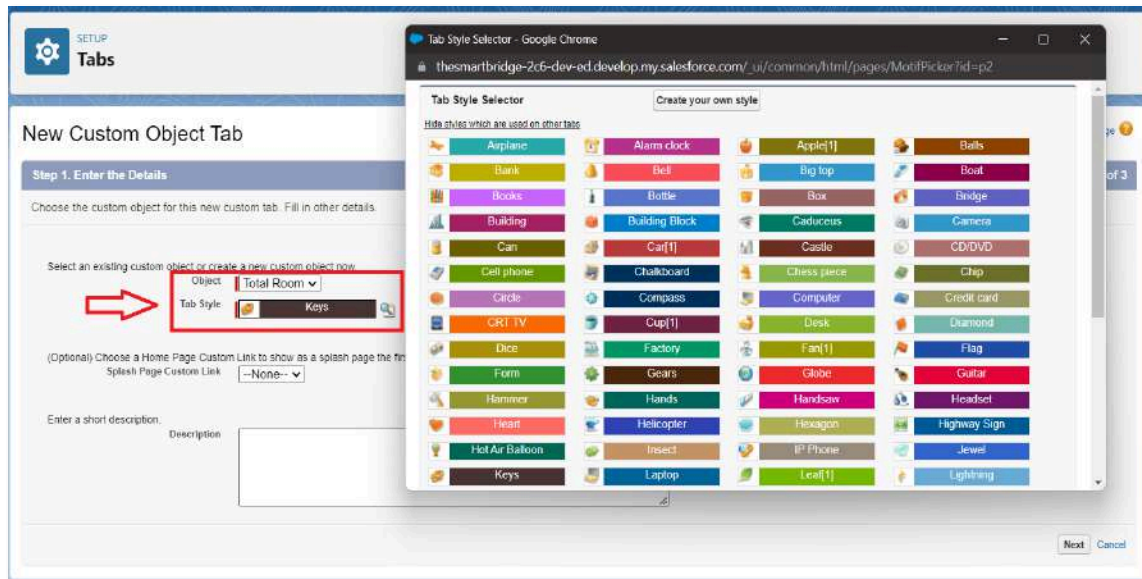
Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs

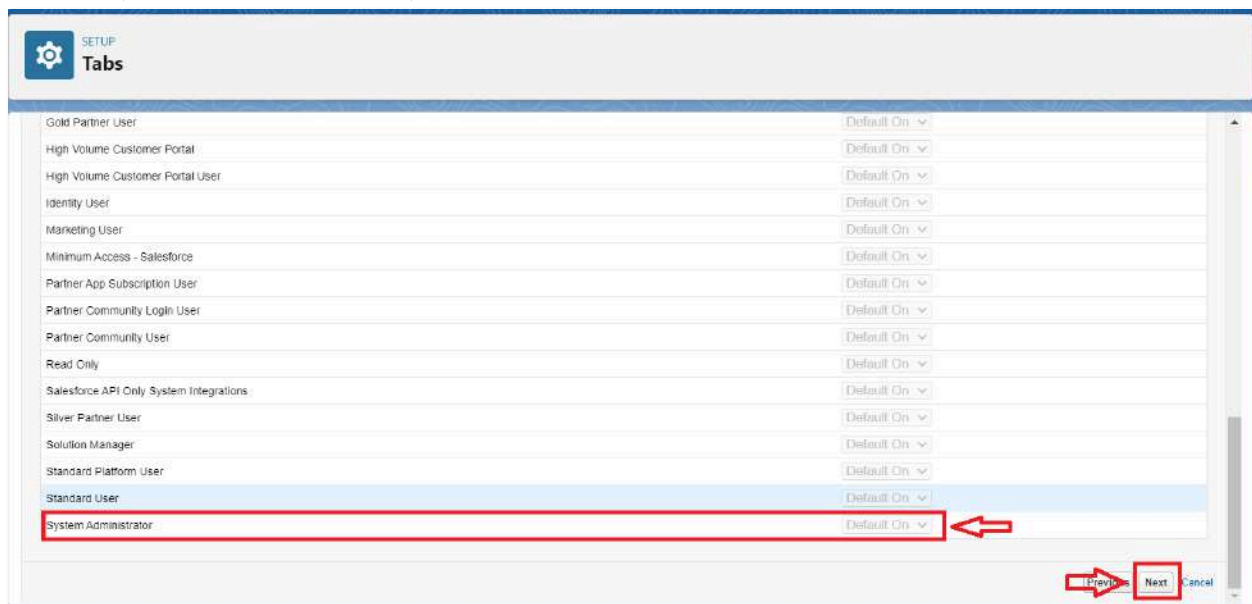
Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

3. Visualforce Tabs

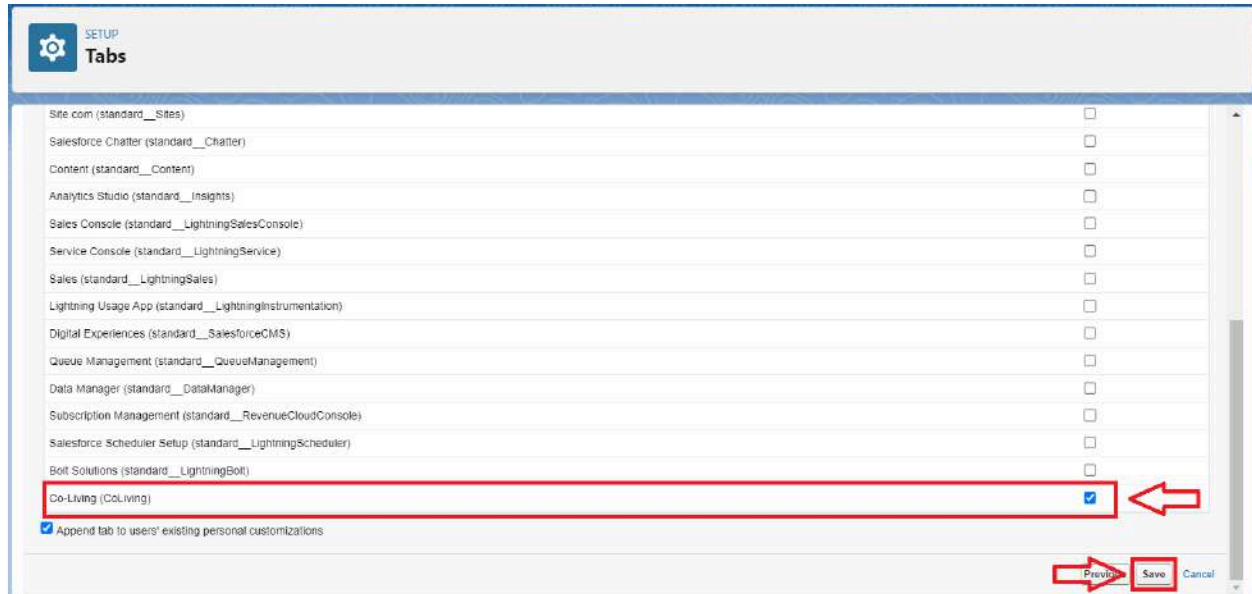
2. Select Object(Total Rooms) > Select the tab style.



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



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



Activity 2 :

Create a Tab for Customers

To create a Tab:(Customers)

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

Activity 3 :

To create a Tab for Room Bookings

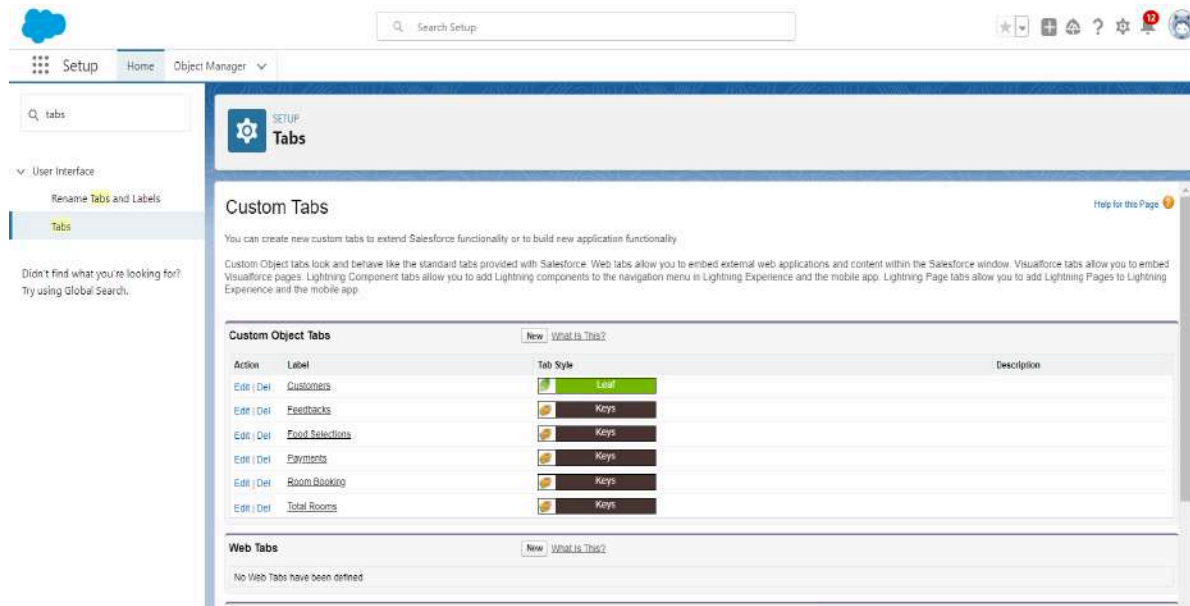
To create a Tab:(Room Bookings)

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

Activity 4 :

Create a Tabs For Remaining Objects

Now create the tabs for Payments, Food Selections, Feedbacks Objects same as like above.



Task 4 - The Lightning App

Introduction :

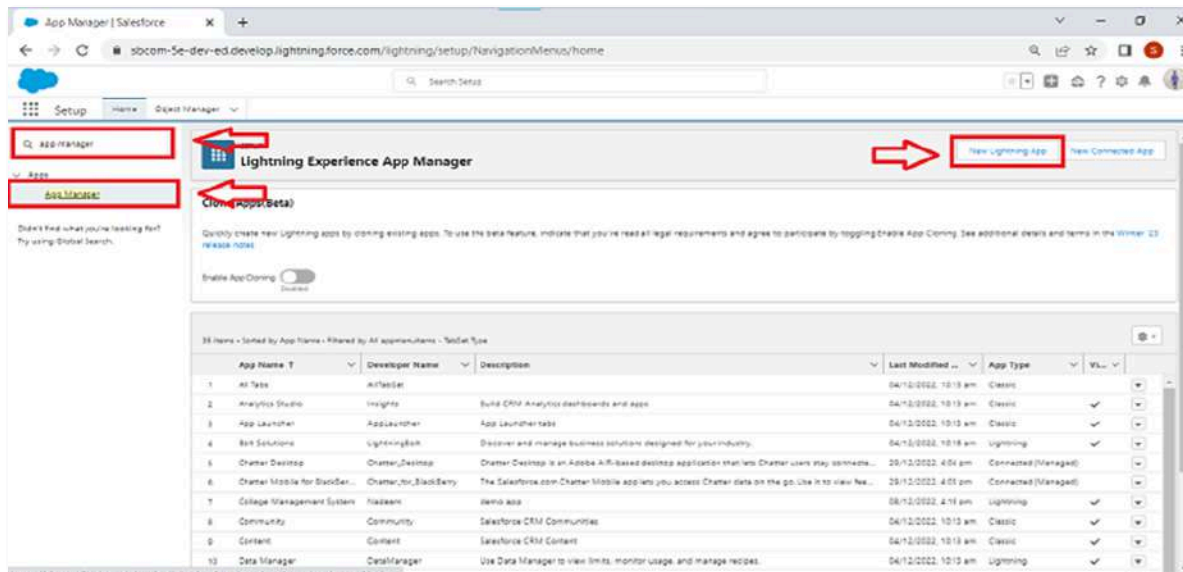
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

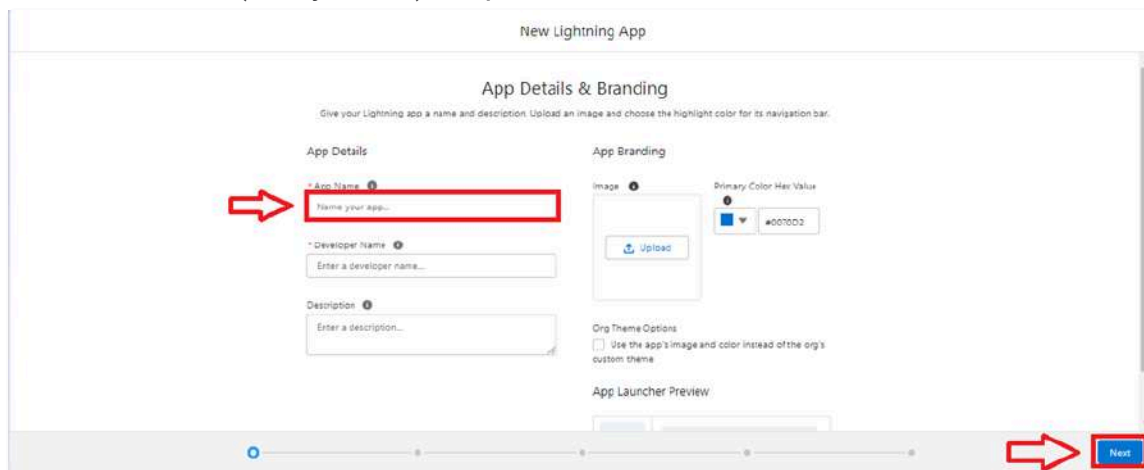
Activity 1 : Create a Lightning App

To create a lightning app page:

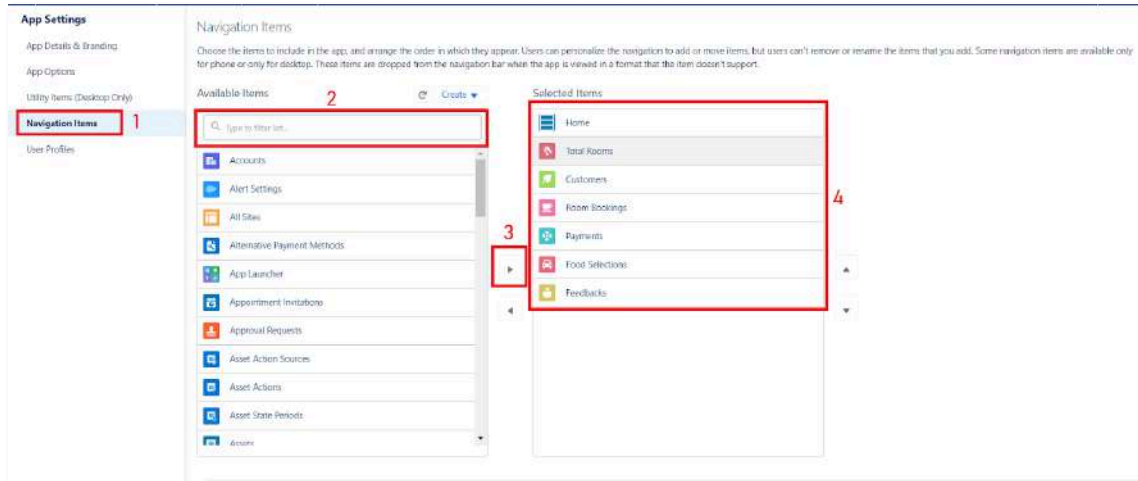
1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.



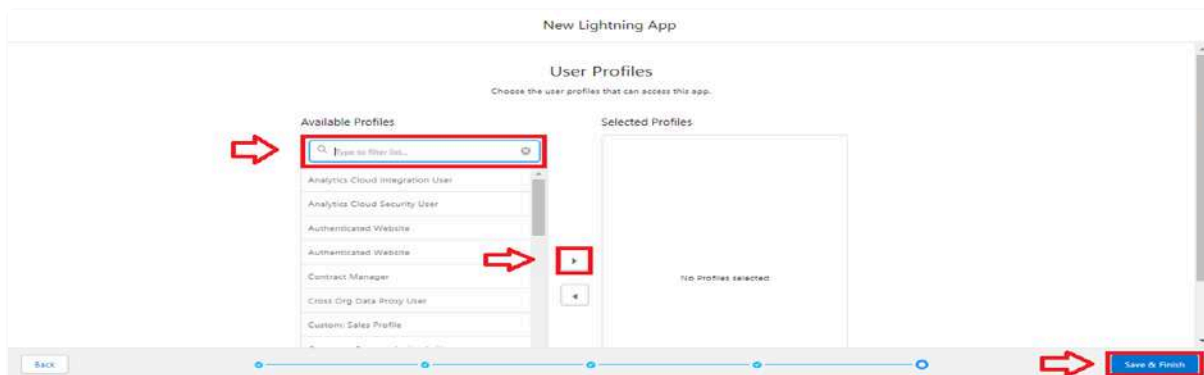
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.



3. To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers1, Room Booking, Payments1, Food selection, Feedbacks, Reports and Dashboards) from the search bar and move it using the arrow button > Next.



4. To Add User Profiles:



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

Task 5 - Fields & Relationships

Introduction :

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

Custom Fields:

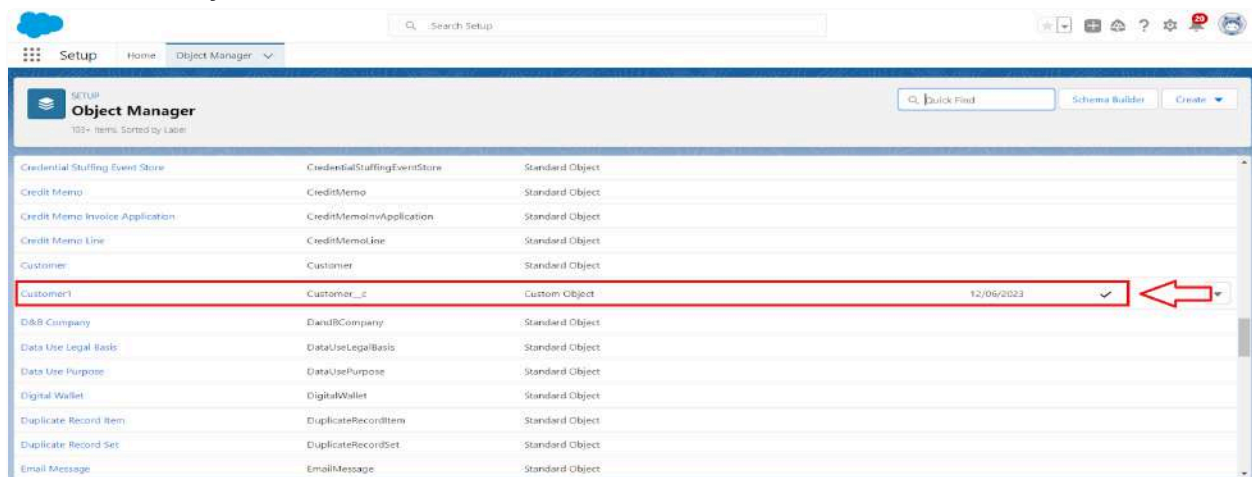
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Activity 1 :

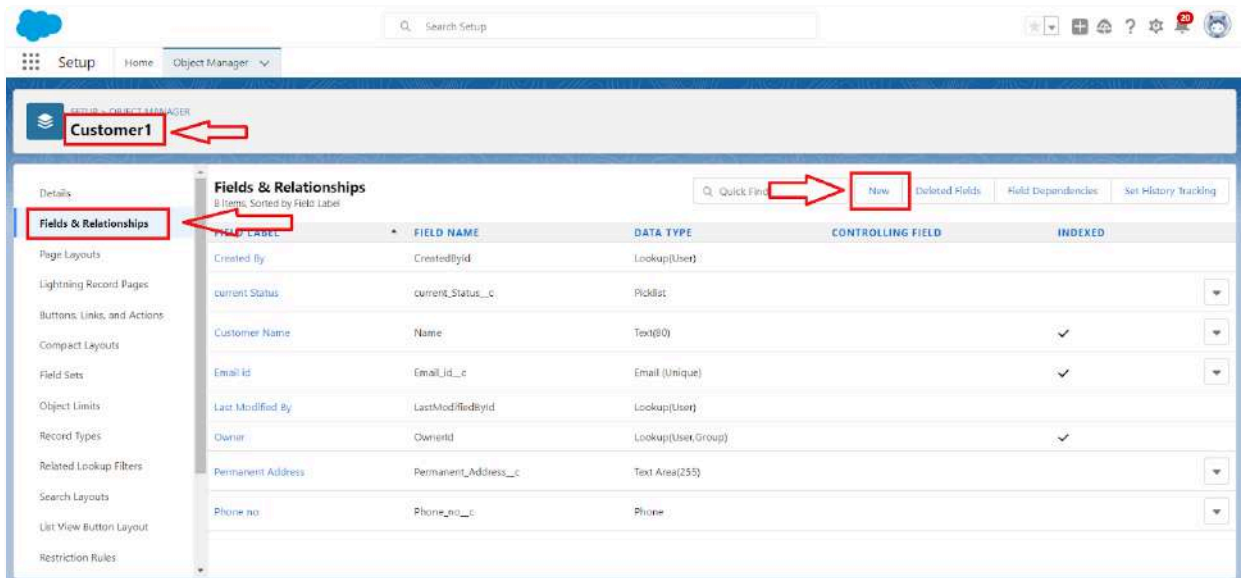
Creation of fields for the customer1 object

1. To create fields in an object:

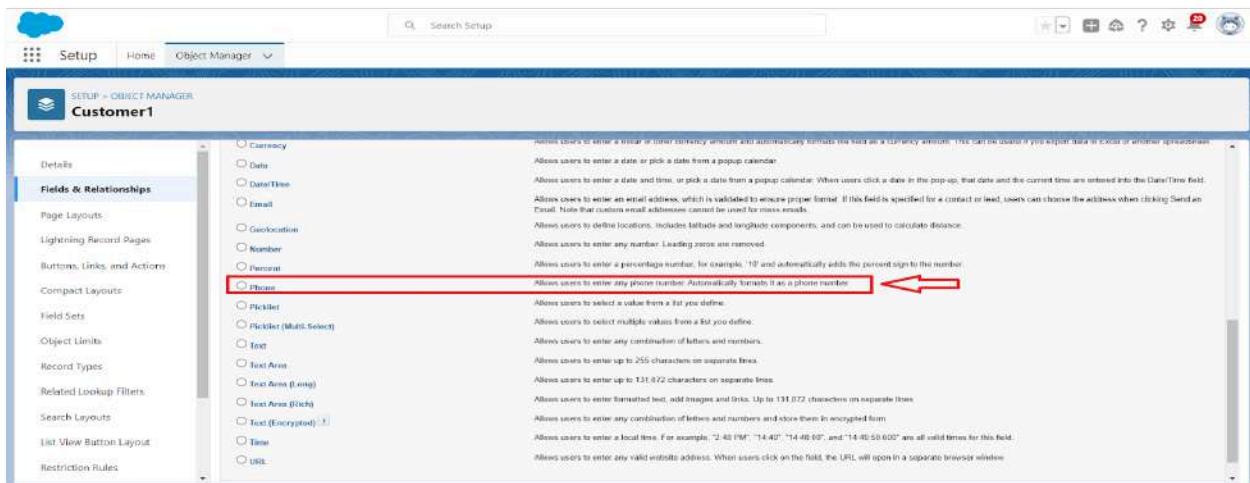
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.



2. Now click on "Fields & Relationships" > 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 search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
 - Field Label: Email
 - Field Name :It’s gets auto generated
 - Click on Next > Next > Save and new.

3. To create another fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data type as a “Text Area” and Click on Next
4. Fill the Above as following:
 - Field Label: Permanent Address
 - Field Name : It’s gets auto generated
 - Click on Next > Next > Save and new.

4. To create another fields in an object:

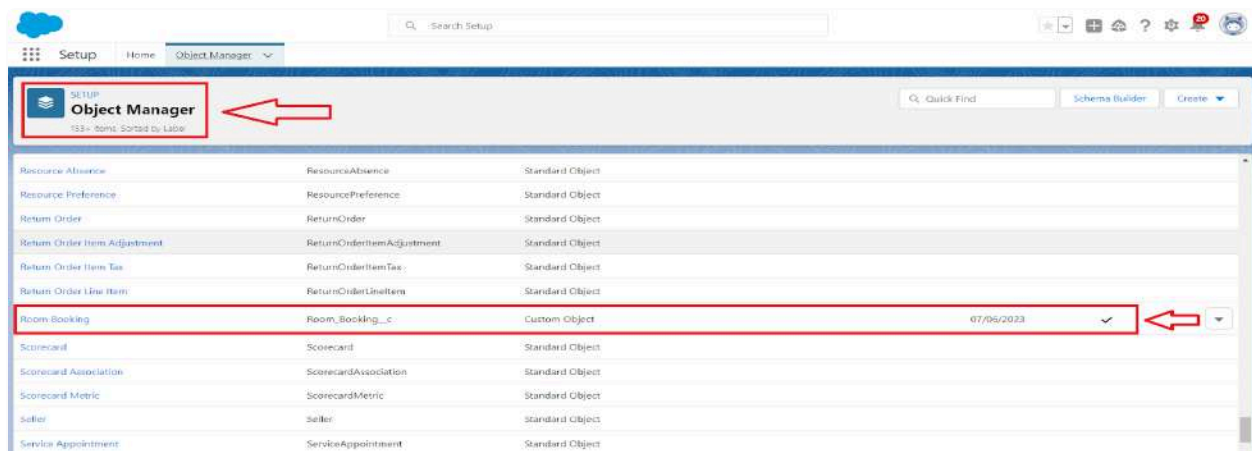
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data type as a "Picklist" and Click on Next
4. Fill the Above as following:
 - Field Label: Current Status
 - Value - Select enter values with each value separated by a new line
 1. Student
 2. Employee
 3. Others
 - Select required
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

Activity 2 :

Creation of fields for the Room Booking object

1. To create fields in an object:

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



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

Setup > OBJECT MANAGER

Room Booking

Details

Fields & Relationships 3 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

3. Select Data Type as a "Picklist"

Setup > OBJECT MANAGER

Room Booking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

☐ Checkbox
☐ Currency
☐ Date
☐ Date/Time
☐ Email
☐ Geolocation
☐ Number
☐ Percent
☐ Phone
☒ **Picklist**
☐ Picklist (Multi-Select)
☐ Text
☐ Text Area
☐ Text Area (Large)
☐ Text Area (Rich)
☐ Text (Encrypted) [Link](#)
☐ Time
☐ URL

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date and time, or pick a date from a popup calendar.

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

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

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

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

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

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

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:48 PM", "14:48", "14:40:00", and "14:40:50.000" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

4. Click on Next

Room Booking

Step 2 of 4

Field Label: 1

Values: ☐ Use global picklist value set
☒ Enter values, with each value separated by a new line 2

Single sharing
Double sharing
Triple sharing

☐ Display values periodically, per 6 the error entries
☐ Use first value as default value
☒ Ranked picklist to the values defined in the value set 3

Field Name:

Description:

Help Text:

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

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity 3

Default Value:

5. Fill the Above as following:

- Field Label: Room Sharing
- Value - Select enter values with each value separated by a new line
- 1. Single sharing
- 2. Double sharing
- 3. Triple sharing
- Select required
- Click on Next > Next > Save and new.

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

To create fields & relationship to an object:

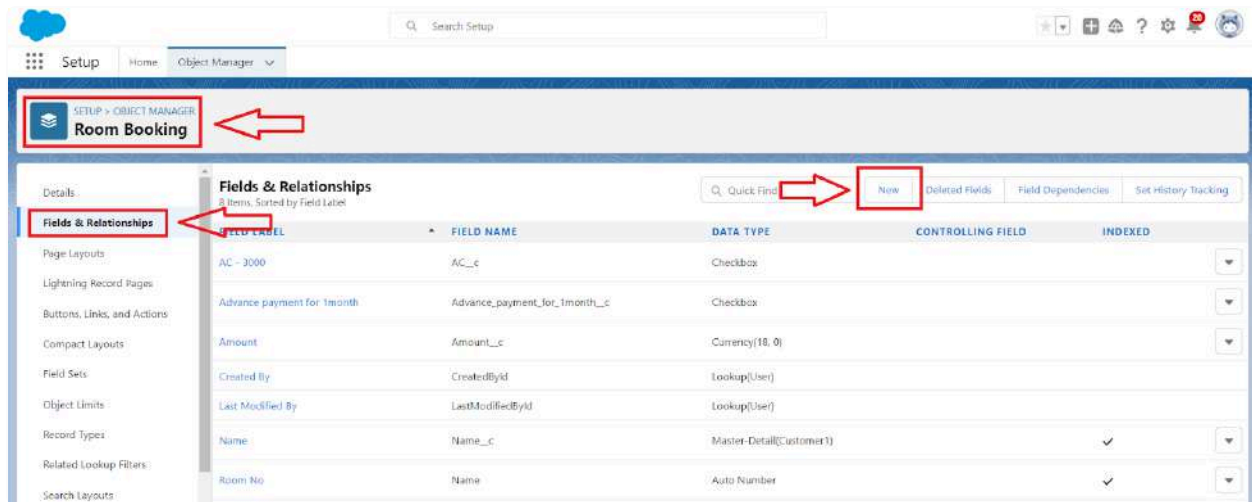
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.

Setup | Home | Object Manager

Object Manager

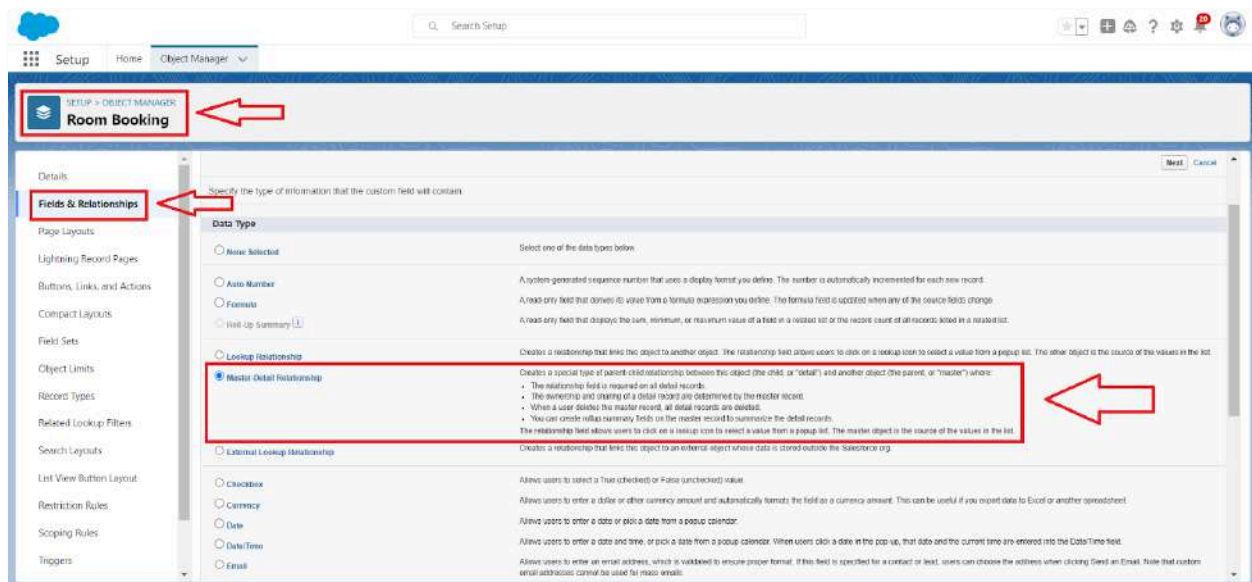
Object Name	Object Label	Object Type	Last Modified By	Created By
Resource Absence	ResourceAbsence	Standard Object		
Resource Preference	ResourcePreference	Standard Object		
Return Order	ReturnOrder	Standard Object		
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object		
Return Order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

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

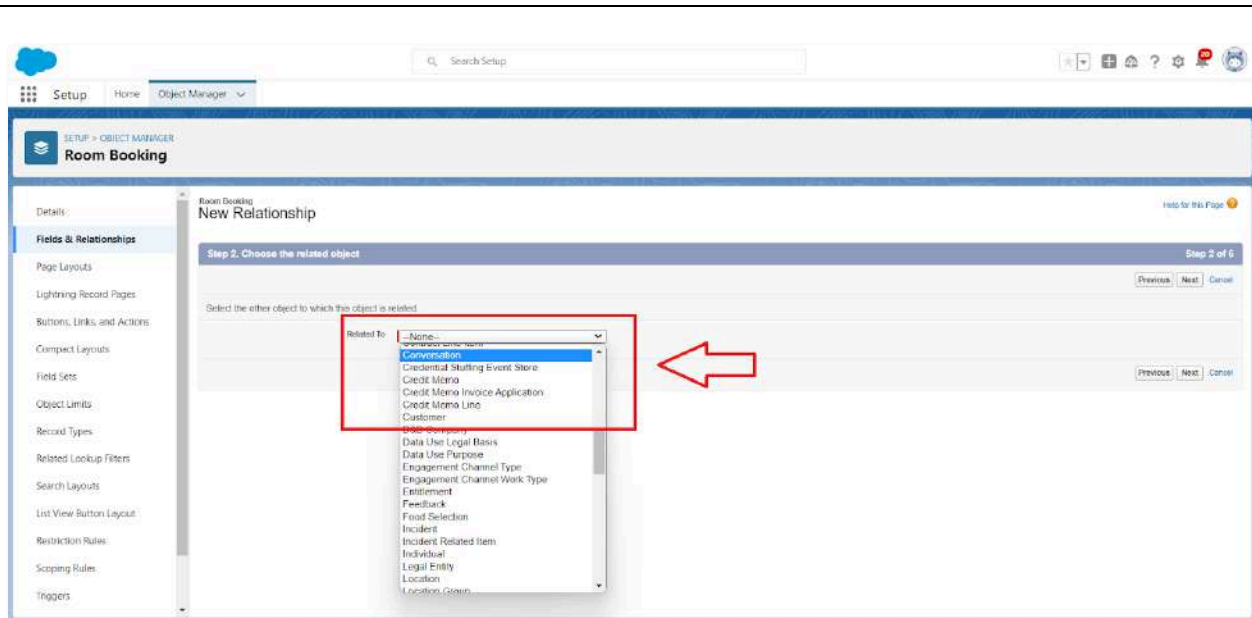


3. Select Data Type as a “Master-detail Relationship”

4. Click on Next

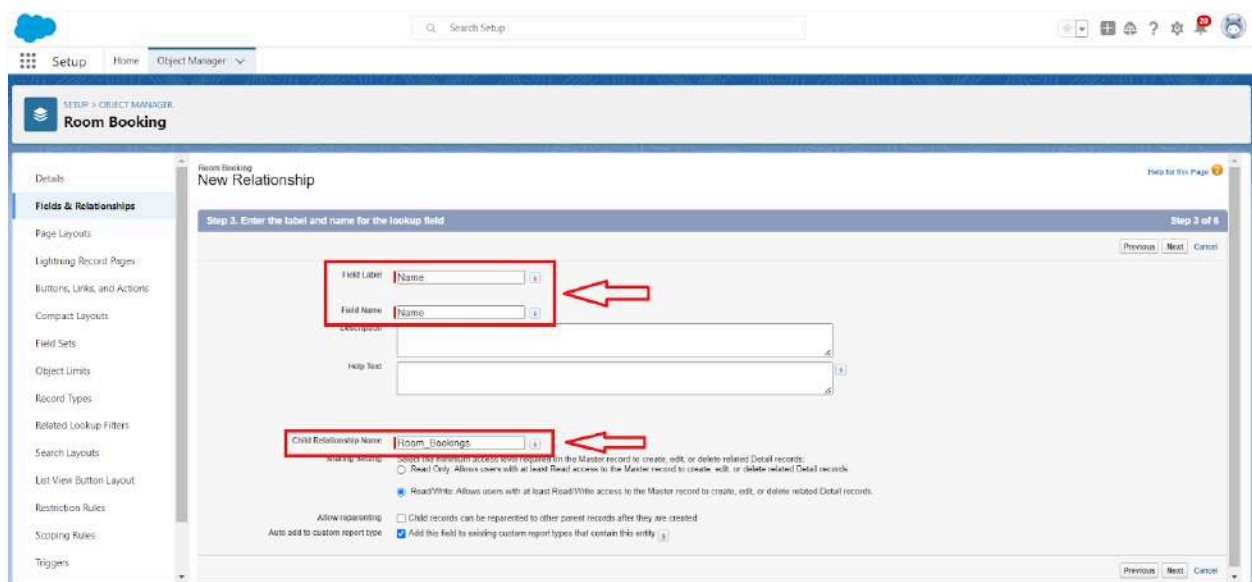


5. Click on the Related to drop down and Select the “Customer1” object and click on Next



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" > New
3. Select Data Type as a "Checkbox"

4. Click on Next
5. Fill the Above as following:
 - Field Label: AC-3000
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new

4. To create fields in an object:

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

5. To create fields in an object:

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

6. To Create a Fields & Relationship to an Object

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

2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Rooms” object and click on Next
 - Fill the Above as following:
 - Change the Field Label: Total No Of Rooms
 - Field Name :It’s gets auto generated
 - Click on Next > Next > Save and new.

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

1. After Creating the Master- Detail Relationship Than Only you can create the Rollup Summary
2. Go to setup > click on Object Manager > type object name(Total Rooms) in the search bar > click on the object.
3. Now click on “Fields & Relationships” ? New
4. Select Data type as a “Roll-up Summary” and Click on Next
 - Fill the Above as following:
 - Field Label: Rooms Booked
 - Field Name :It’s gets auto generated
 - Click on Next
5. Select the Room Bookings in the Summarized Object
6. Select the count Radio button in the select Roll-up Type

Total Room: New Custom Field

Step 3. Define the summary calculation Step 3 of 6

Select Object to Summarize

Master Object: Total Room

Summarized Object: Room Bookings

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate: None

Filter Criteria

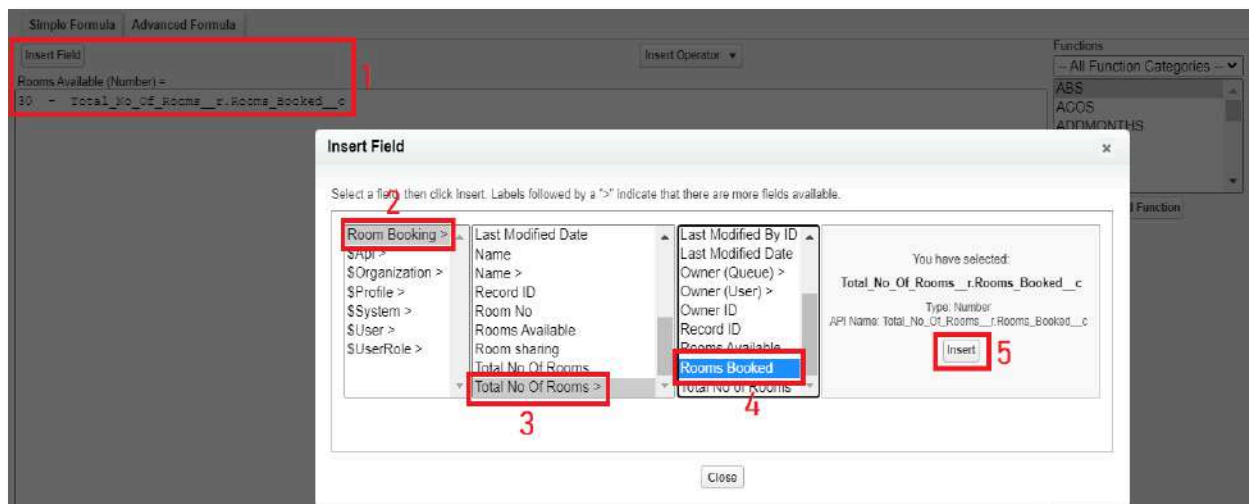
☒ All records should be included in the calculation

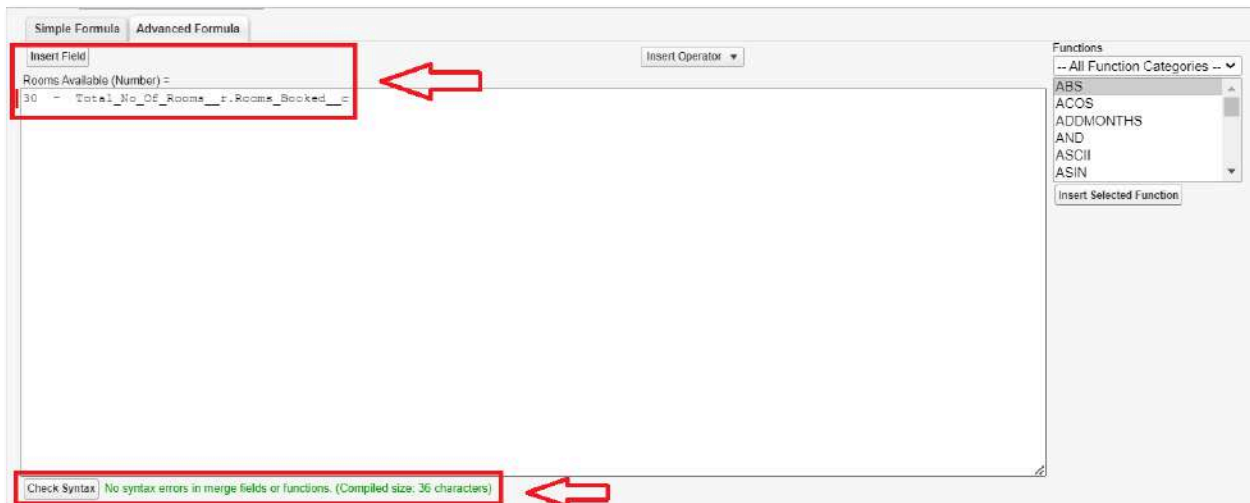
☐ Only records meeting certain criteria should be included in the calculation

7. Click on Next > Next > Save and new

8. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Rooms Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data type as a "Formula" and Click on Next
4. Fill the Above as following:
 - Field Label: Rooms Available
 - Field Name : It's gets auto generated
 - Select the Formula Return Type as "Number"
 - Select the Decimal places as "0" and Click on Next
 - Click on the Advanced Formula and Enter the value in formula box " 30 - " and Click on insert field than you will find a pop window under the Room Booking select the Total No Of Rooms in the second Column and select the Room Booked in the third column and click on insert " 30 - Total_No_Of_Rooms__r.Rooms_Booked__c " and Check Syntax





- Click on Next > Next > Save and new.

9. To create fields in an object:

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

10. To create fields in an object:

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

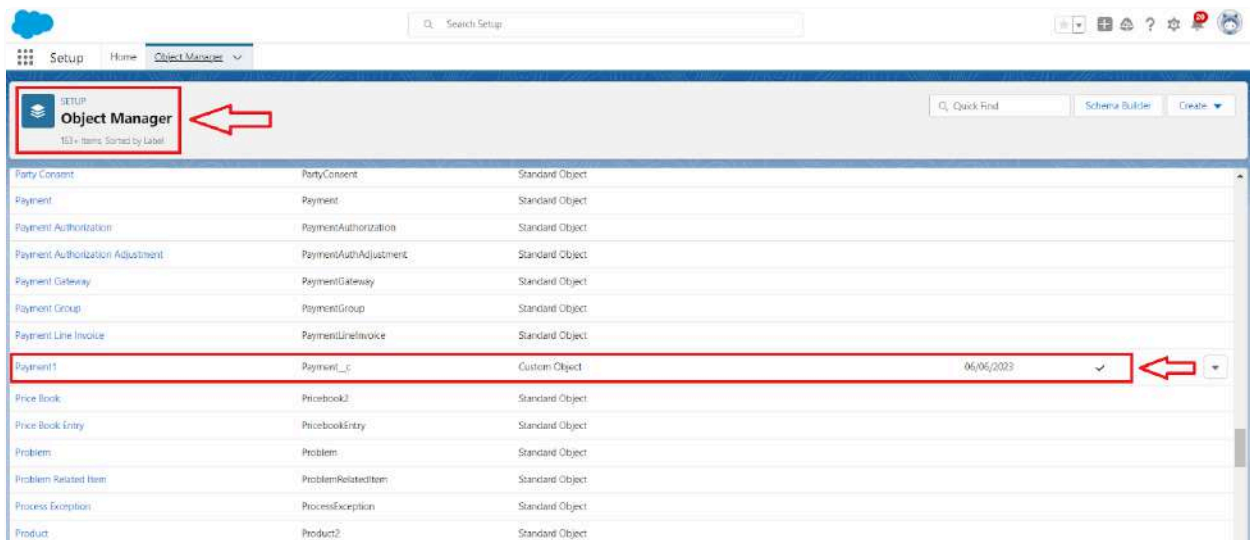
- Click on Next > Next > Save and new

Activity 3 :

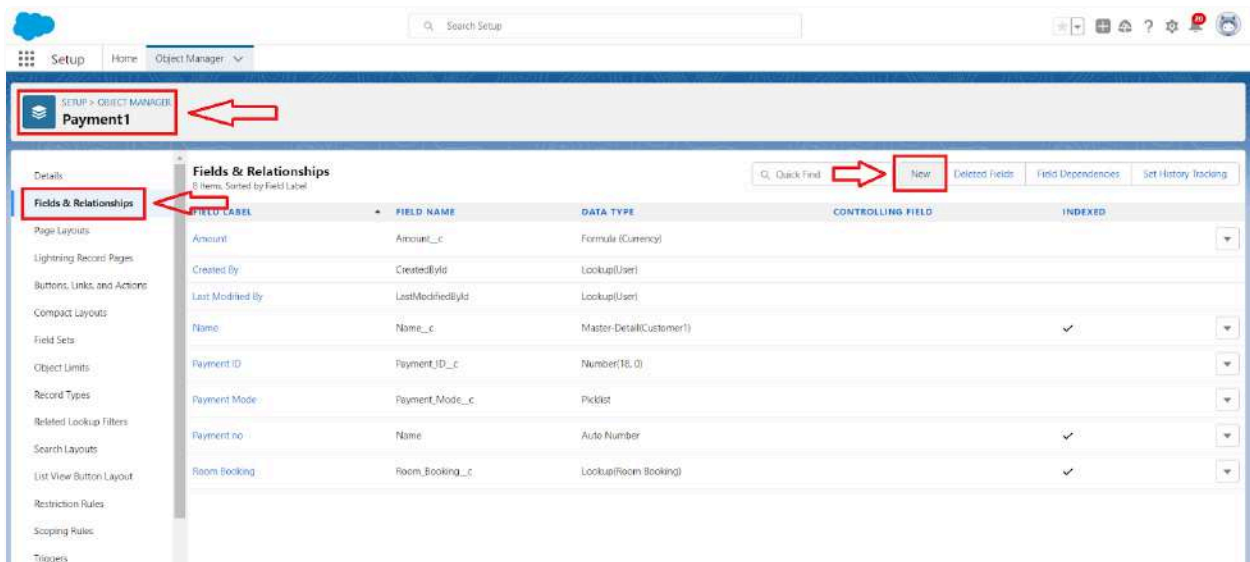
Creation of Fields & Relationship for Payment Object

1. To create fields & relationship to an object:

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



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



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

The screenshot shows the Salesforce Setup interface for the 'Payment1' object. The left sidebar contains a list of configuration options: Details, Fields & Relationships (highlighted with a red box and arrow), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Screening Rules. The main content area is titled 'Specify the type of information that the custom field will contain.' Under the 'Data Type' section, several options are listed: None Selected, Auto Number, Formula, Read-Only Summary, Master Detail Relationship (selected with a red box and arrow), External Lookup Relationship, Checkbox, Currency, and Date. Each option has a brief description of its functionality.

4. Click on Next

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

The screenshot shows the 'New Relationship' dialog box in the Salesforce Setup interface. The dialog is titled 'Step 2. Choose the related object' and 'Step 2 of 8'. It contains a 'Related To' dropdown menu that is open, showing a list of objects: None, Credit Memo Line, Container, D&D Company, Data Use Legal Basis, RelationshipType, Engagement Channel Type, Engagement Channel Work Type, Entitlement, Feedback, Food Selection, Incident, and Incident Related Item. The 'Customer1' object is highlighted in the list. The dialog also includes 'Previous', 'Next', and 'Cancel' buttons.

Setup > OBJECT MANAGER
Payment1

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

Payment1
New Relationship

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

Field Label: Name
Field Name: Name
Description:
Help Text:

Child Relationship Name: Payments1
Sharing Model: Read Only

Read/Write: Allow users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Read Only: Allow users with at least Read access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: Child records can be reparented to other parent records after they are created.
Add this field to existing custom report types that contain this entity: ☒

Previous Next Cancel

6. Fill the Above as following:

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

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

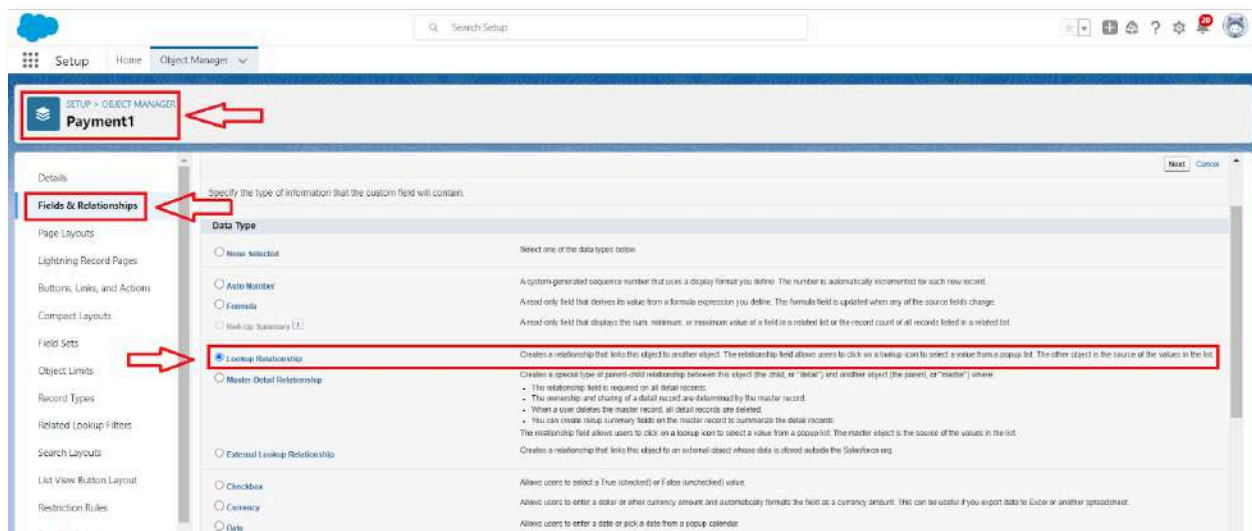
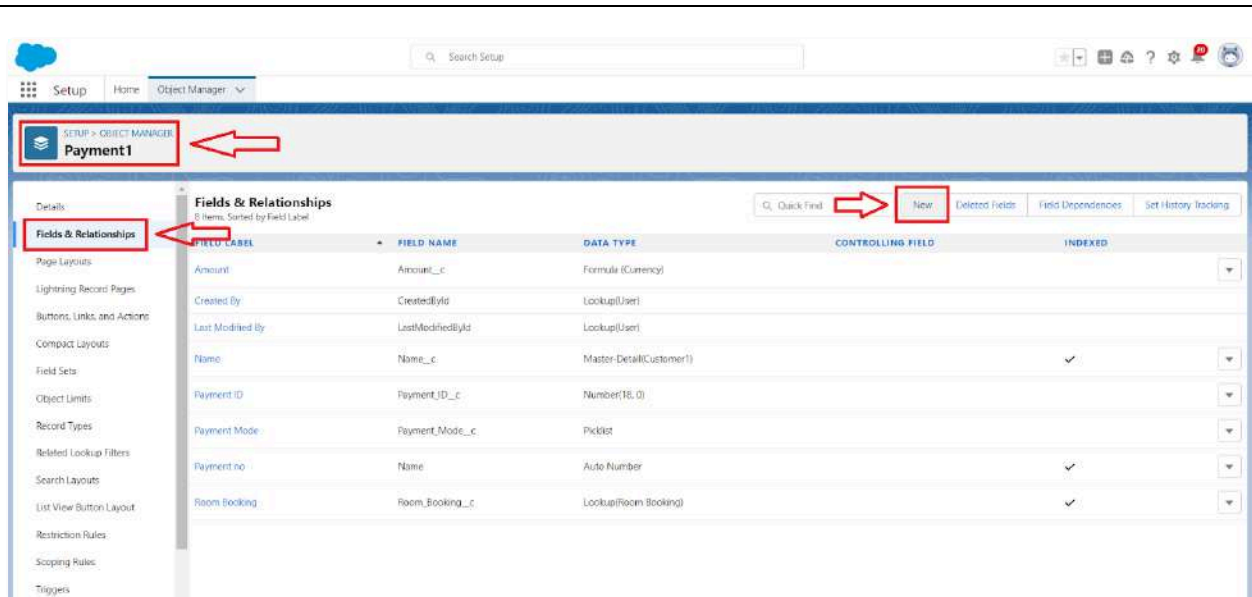
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.

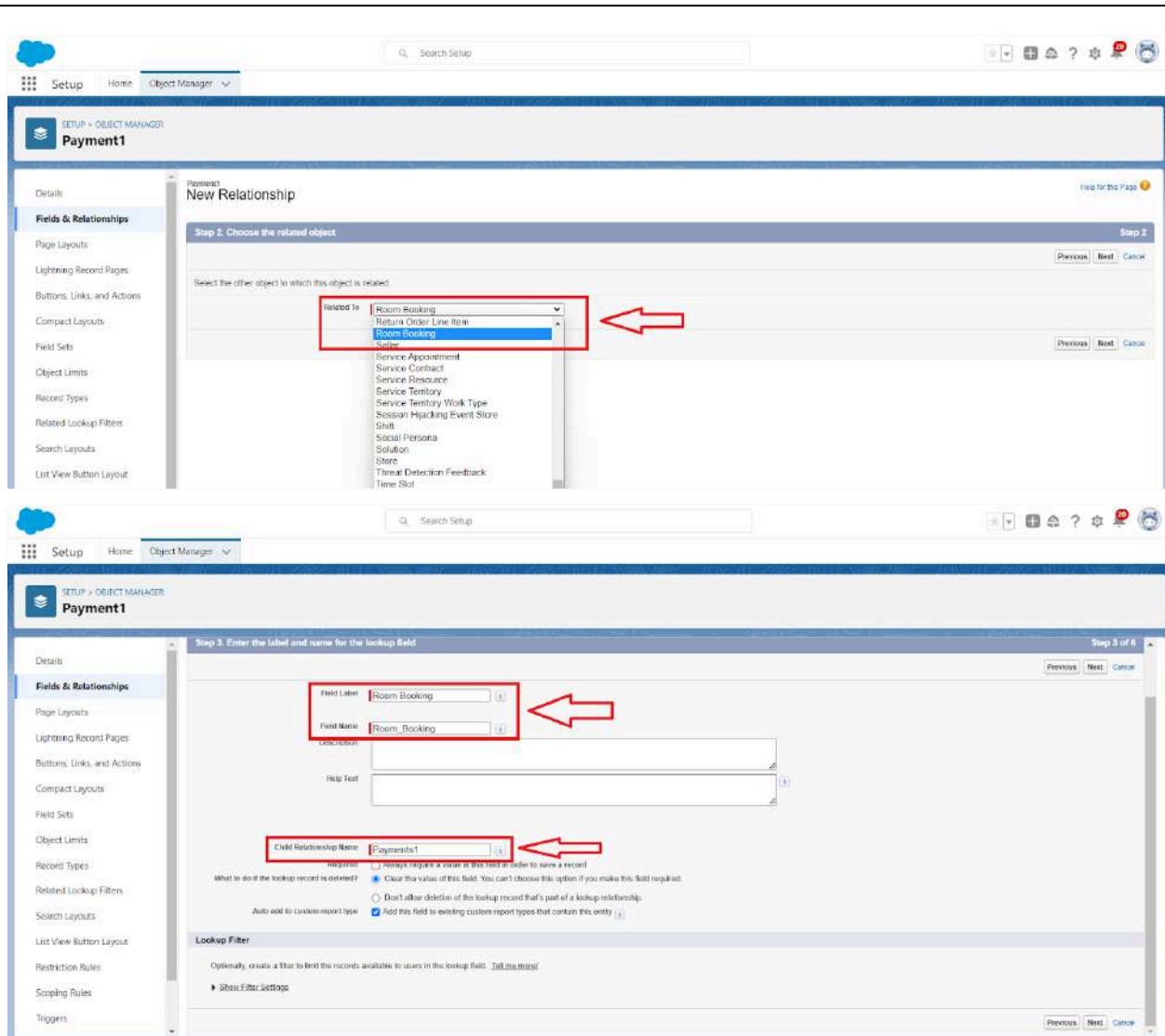
Setup > Object Manager

Object Manager
103+ Items, Sorted by Label

Object Name	Object Label	Object Type	Created Date	Created By
Party Consent	PartyConsent	Standard Object		
Payment	Payment	Standard Object		
Payment Authorization	PaymentAuthorization	Standard Object		
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object		
Payment Gateway	PaymentGateway	Standard Object		
Payment Group	PaymentGroup	Standard Object		
Payment Line Invoice	PaymentLineInvoice	Standard Object		
Payment1	Payment__c	Custom Object	06/06/2023	
Price Book	Pricebook2	Standard Object		
Price Book Entry	PricebookEntry	Standard Object		
Problem	Problem	Standard Object		
Problem Related Item	ProblemRelatedItem	Standard Object		
Process Exception	ProcessException	Standard Object		
Product	Product2	Standard Object		

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





6. Fill the Above as following:

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

3. Creation of another fields for the Payment1 object

To create fields in an object:

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

Object Manager

13+ Items, Sorted by Label

Object Label	Object Name	Object Type	Last Modified By	Actions
Payment Authorization	PaymentAuthorization	Standard Object		
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object		
Payment Gateway	PaymentGateway	Standard Object		
Payment Group	PaymentGroup	Standard Object		
Payment Line Invoice	PaymentLineInvoice	Standard Object		
Payment1	Payment__c	Custom Object	06/06/2023	✓
Price Book	Pricebook2	Standard Object		
Price Book Entry	PricebookEntry	Standard Object		
Problem	Problem	Standard Object		
Problem Related Item	ProblemRelatedItem	Standard Object		
Process Exception	ProcessException	Standard Object		
Product	Product2	Standard Object		

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

Object Manager

Payment1

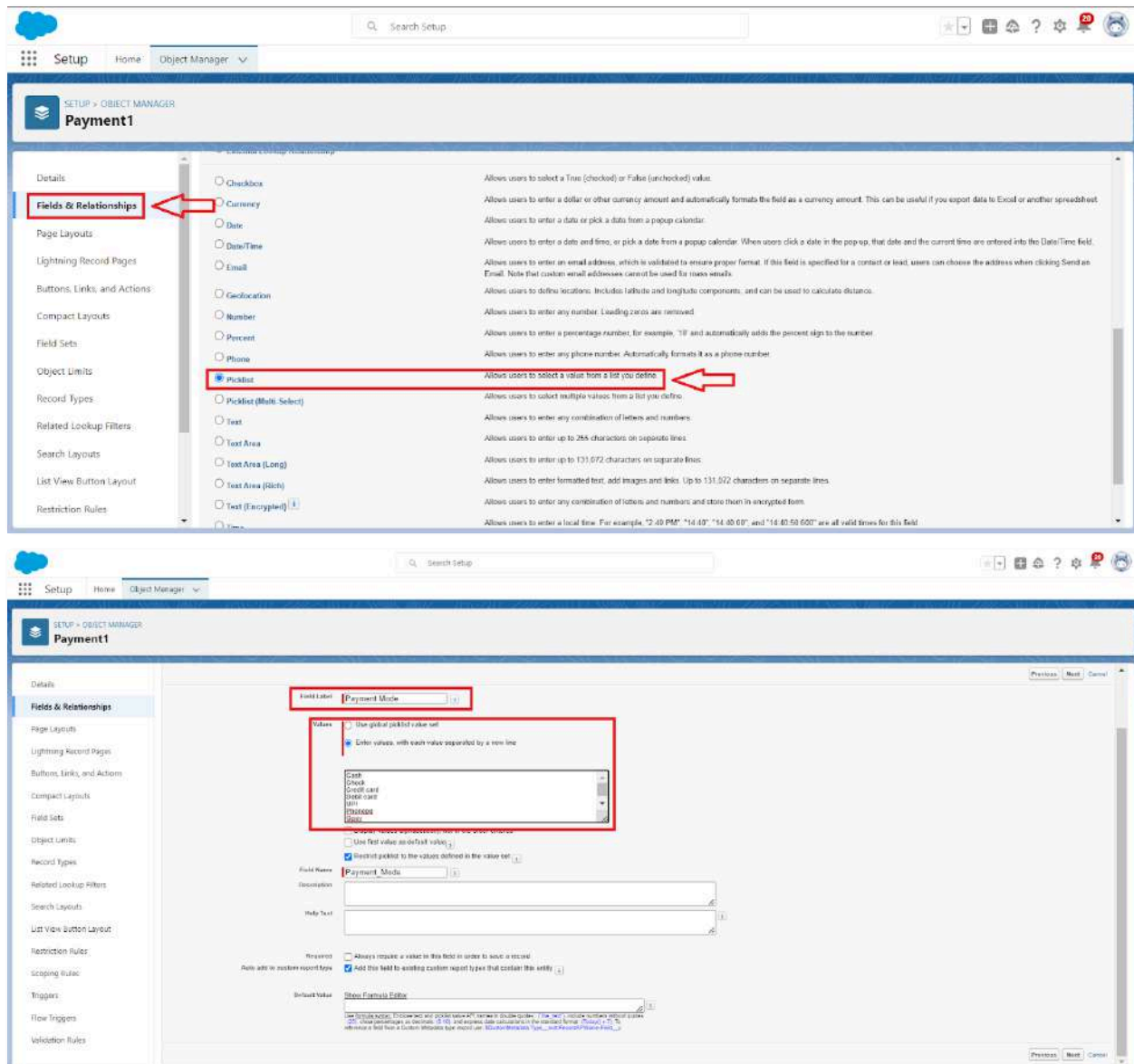
Fields & Relationships

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Controlling Field	Indexed
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)		✓
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number		✓
Room Booking	Room_Booking__c	Lookup(Room Booking)		✓

3. Select Data Type as a “Picklist”



4. Fill the Above as following:

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

8. Paytm

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

Cross Object Formula Field:

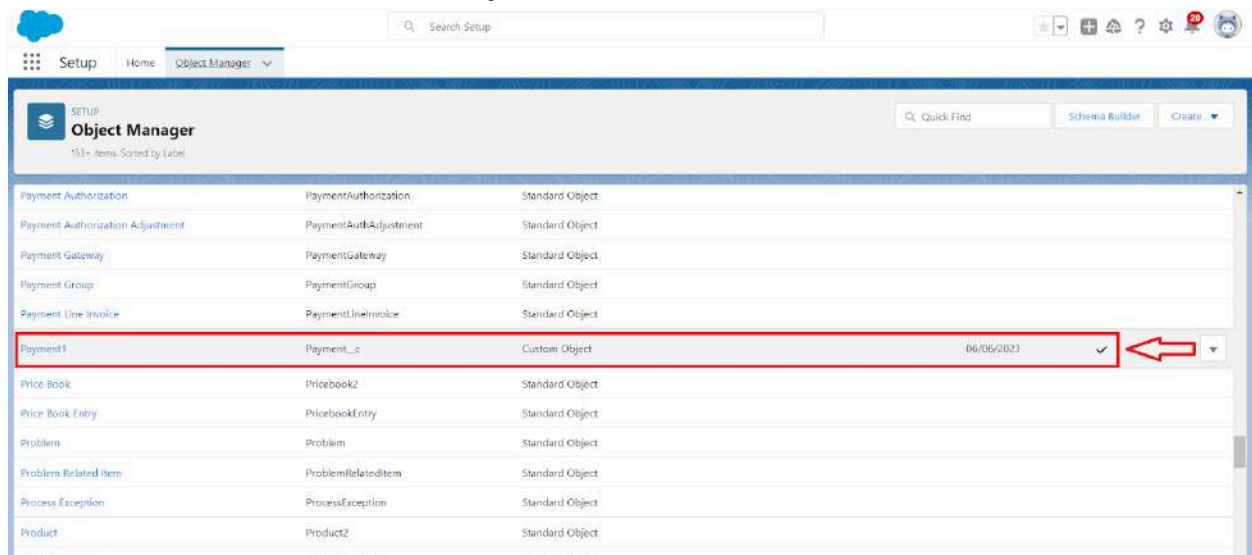
In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

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

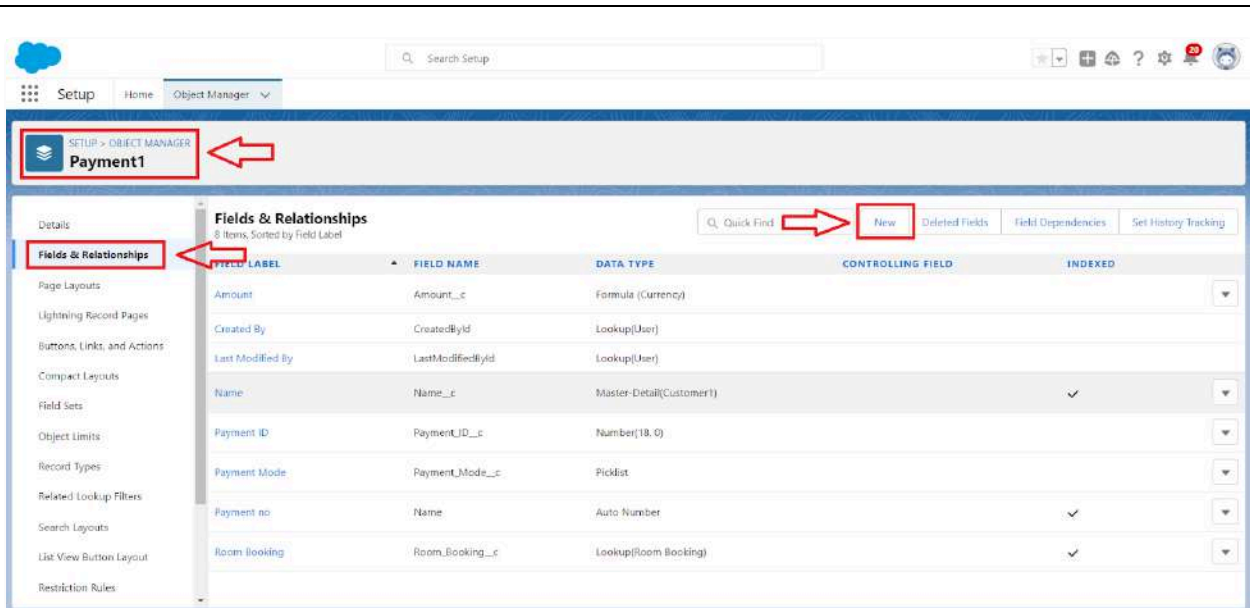
If we want to get the Particular field from another object in that case we will use the Cross object Formula field. For that First we need to create the relationship b/w two objects and relate the field with formula data type.

4. Create a Cross object formula Field in Payment1 Object

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

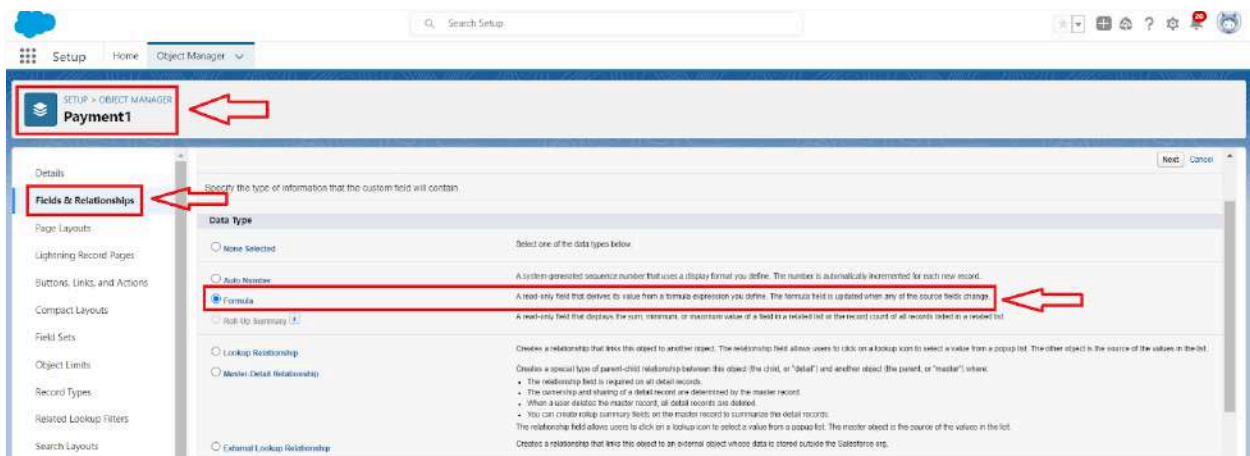


2. Now click on "Fields & Relationships" > New

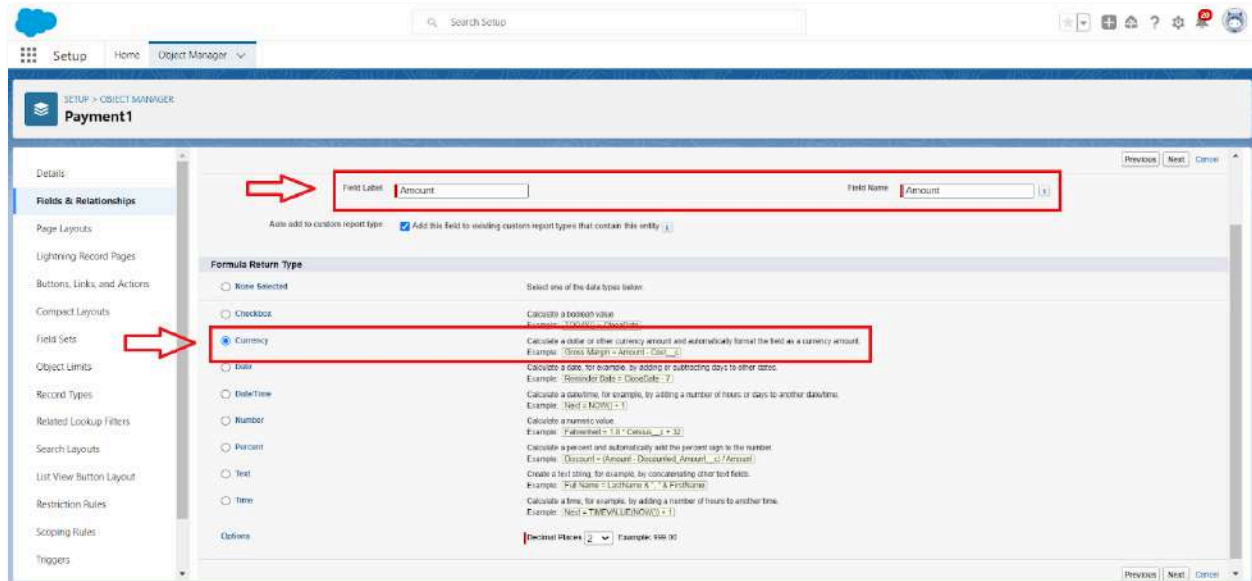


3. Select Data Type as a "Formula"

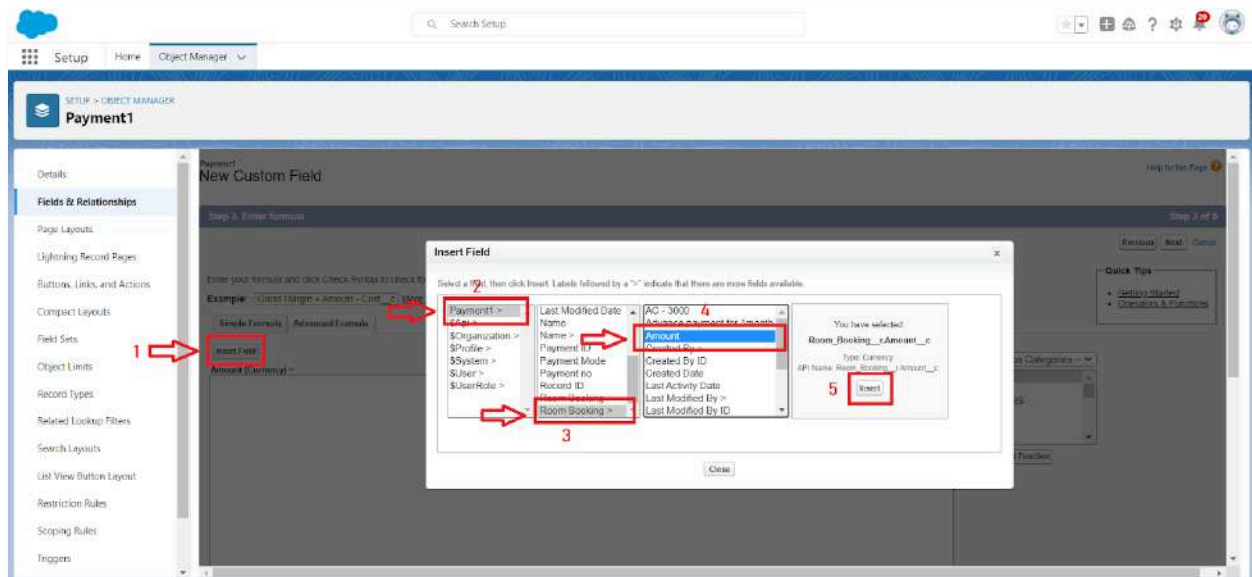
4. Click on Next

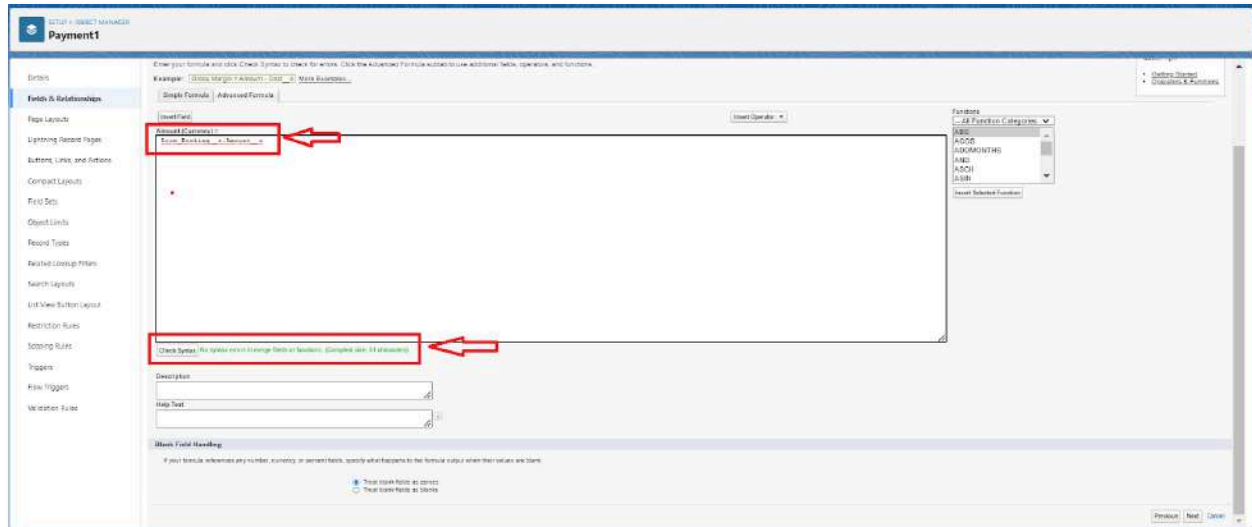


5. Enter the Field label: Amount and Field name: gets auto generated and click on Next



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





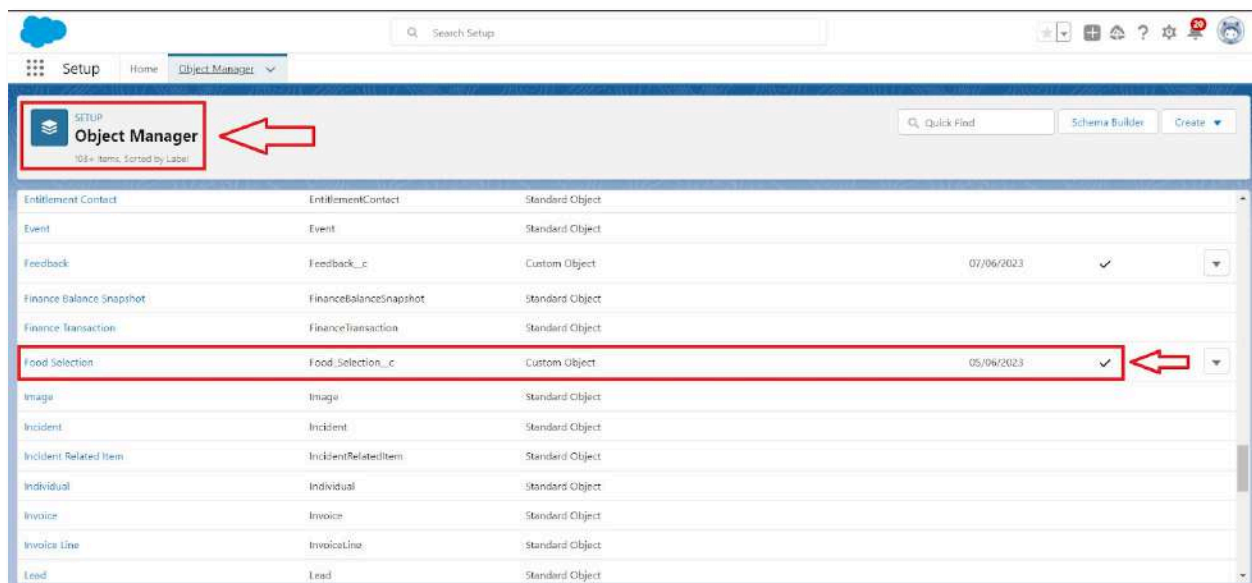
7. Click on the Check syntax: No syntax errors in merge fields
8. Click on Next > Next > Save and new.

Activity 4 :

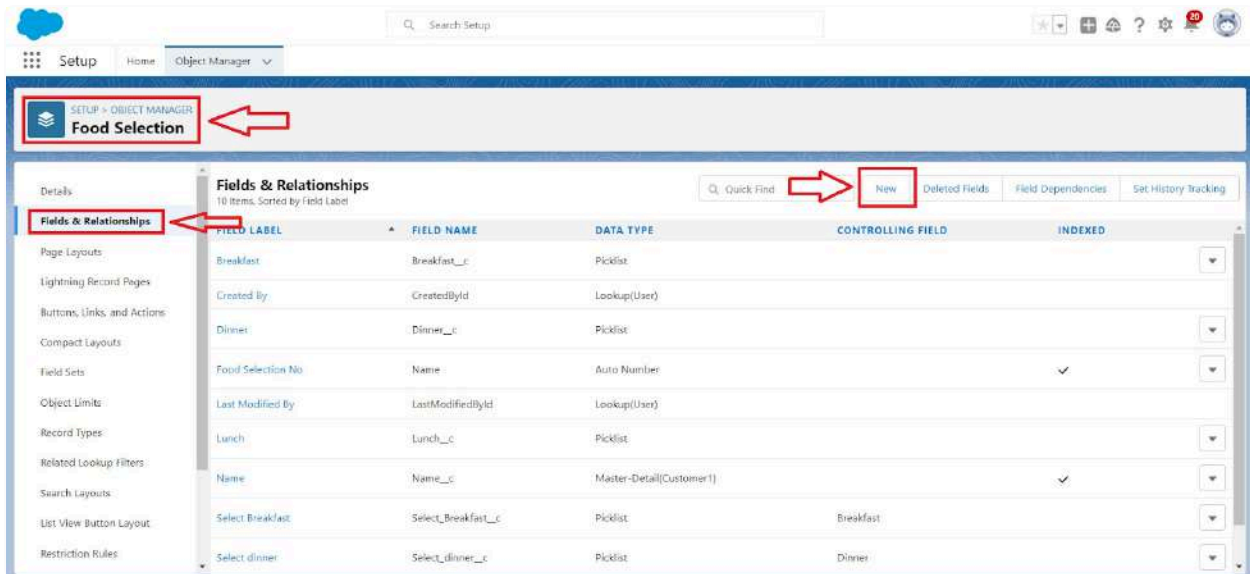
Creation of fields for the Food Selection object

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.

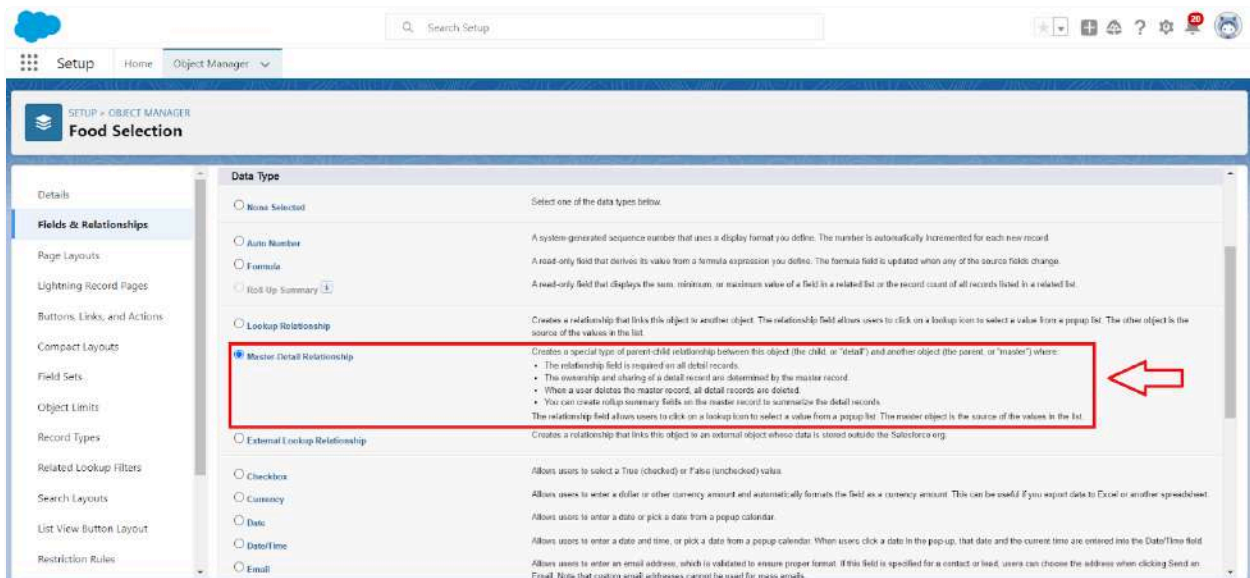


2. Now click on "Fields & Relationships" > New

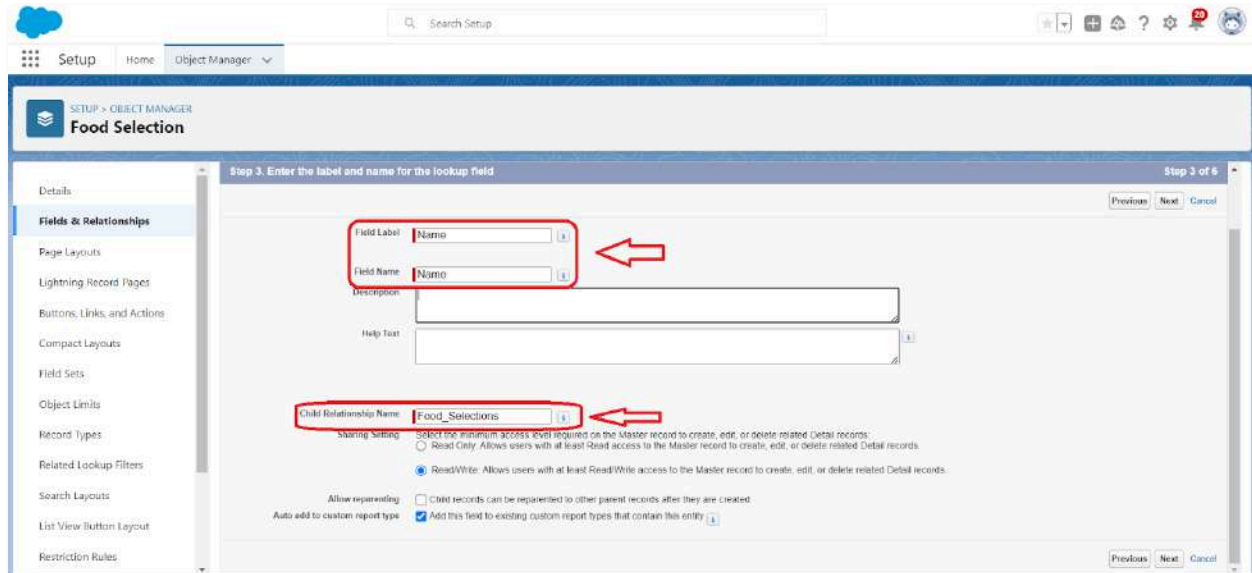
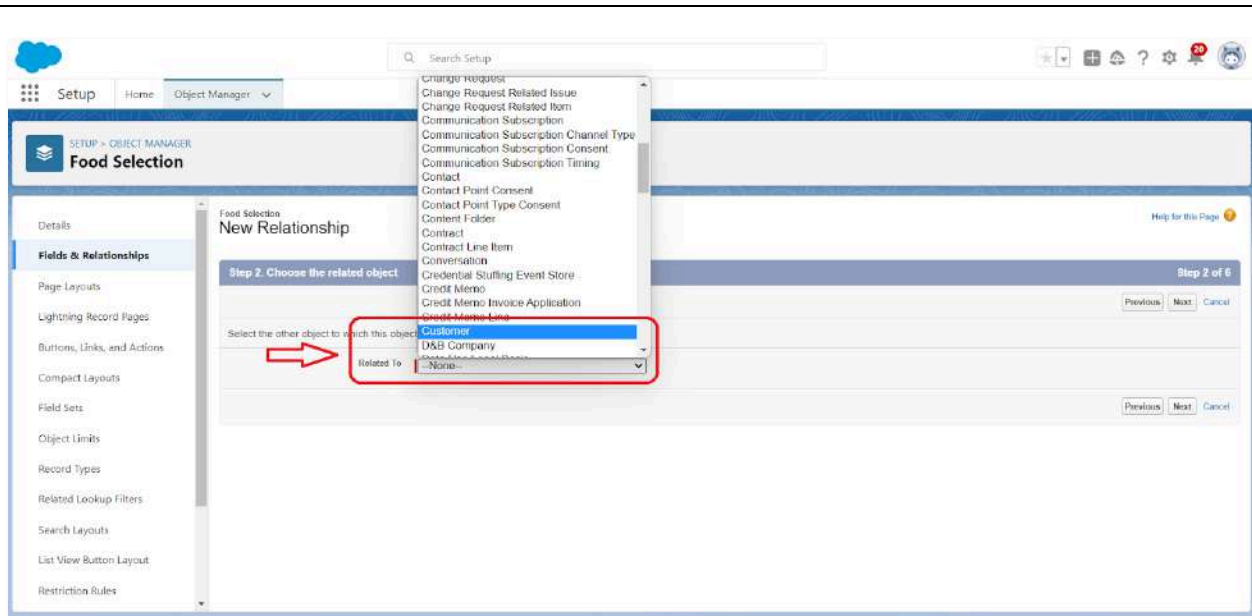


3. Select Data Type as a “Master-detail Relationship”

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:

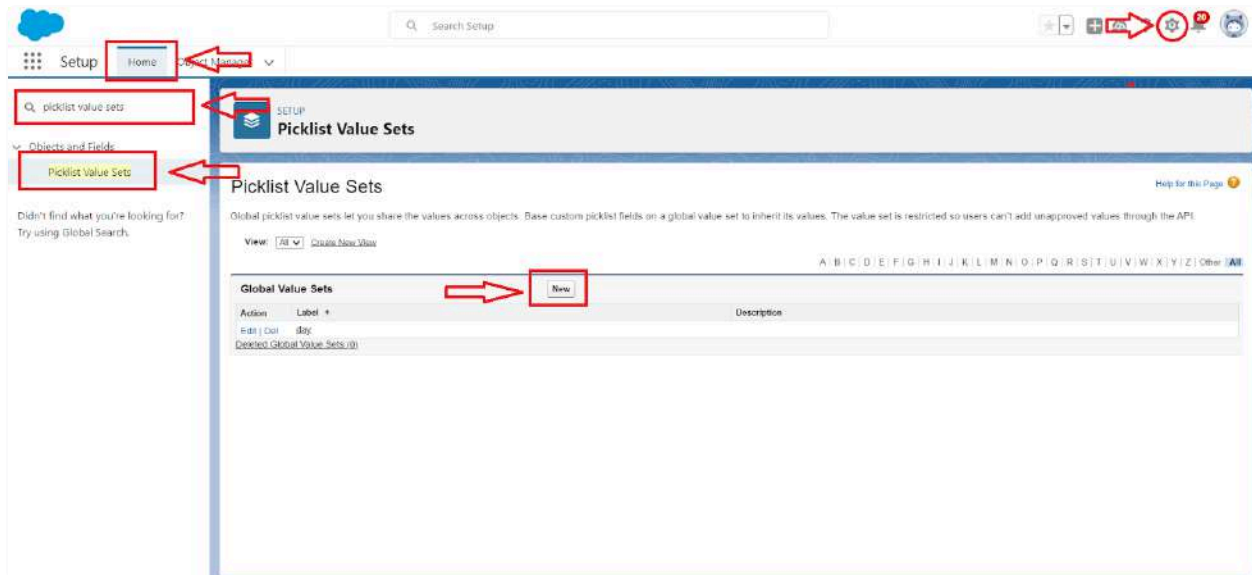
- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

Picklist value sets:

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

Create a picklist value set:

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



4. Enter the Label name and API name automatically Generate
5. Enter the values with each value separated by a new line
 - Sunday
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday

Setup Home Object Manager

Search Setup

picklist value sets

Objects and Fields

Picklist Value Sets

Didn't find what you're looking for? Try using Global Search.

Global Value Set Edit

Save Save & New Cancel

Information

Label Custom Picklist values

Name Custom_Picklist_values

Description

Values

Enter values, with each value separated by a new line.

Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

☐ Display values alphabetically, not in the order entered

☒ Use first value as default value

Save Save & New Cancel

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

2. Create a picklist Field for Food selection object

To create fields in an object:

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

Setup Home Object Manager

Search Setup

Object Manager

Quick Find Schema Builder Create

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

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

Setup Home Object Manager

SETUP > OBJECT MANAGER **Food Selection**

Details

Fields & Relationships 10 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

3. Select Data Type as a "Picklist"

Setup Home Object Manager

SETUP > OBJECT MANAGER **Food Selection**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

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

Allows users to enter a decimal or other currency amount and automatically formats the text as a currency amount. This can be used if you expect data to enter as another spreadsheet.
 Allows users to enter a date or pick a date from a popup calendar.
 Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.
 Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
 Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
 Allows users to enter any number. Leading zeros are removed.
 Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
 Allows users to enter any phone number. Automatically formats it as a phone number.
 Allows users to select a value from a list you define.
 Allows users to select multiple values from a list you define.
 Allows users to enter any combination of letters and numbers.
 Allows users to enter up to 255 characters on separate lines.
 Allows users to enter up to 131,072 characters on separate lines.
 Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
 Allows users to enter any combination of letters and numbers and store them in encrypted form.
 Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" are all valid times for this field.
 Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Setup > Object Manager > Food Selection > New Custom Field

Step 2: Enter the details

Field Label: Breakfast

Value: Use global picklist value set

Custom Picklist values

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

Field Name: Breakfast

Description: Breakfast

Help text:

Default value:

Next >

4. Fill the Above as following:

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

3. Create a another picklist Field for Food selection object

To create fields in an object :

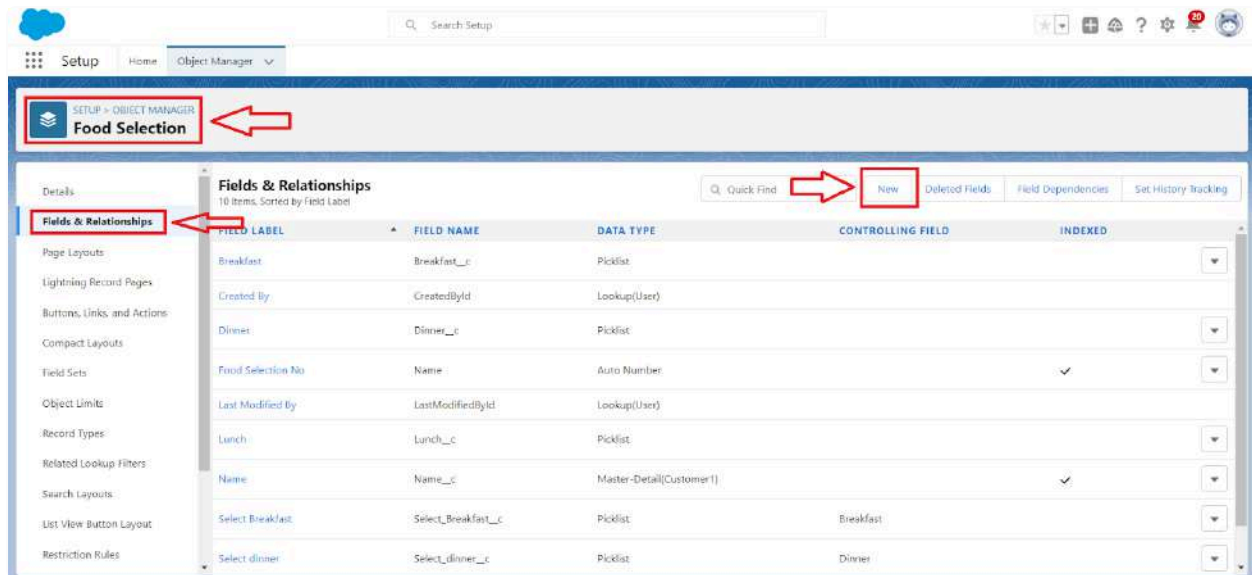
1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.

Setup > Object Manager

Quick Find: Schema Builder Create

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

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

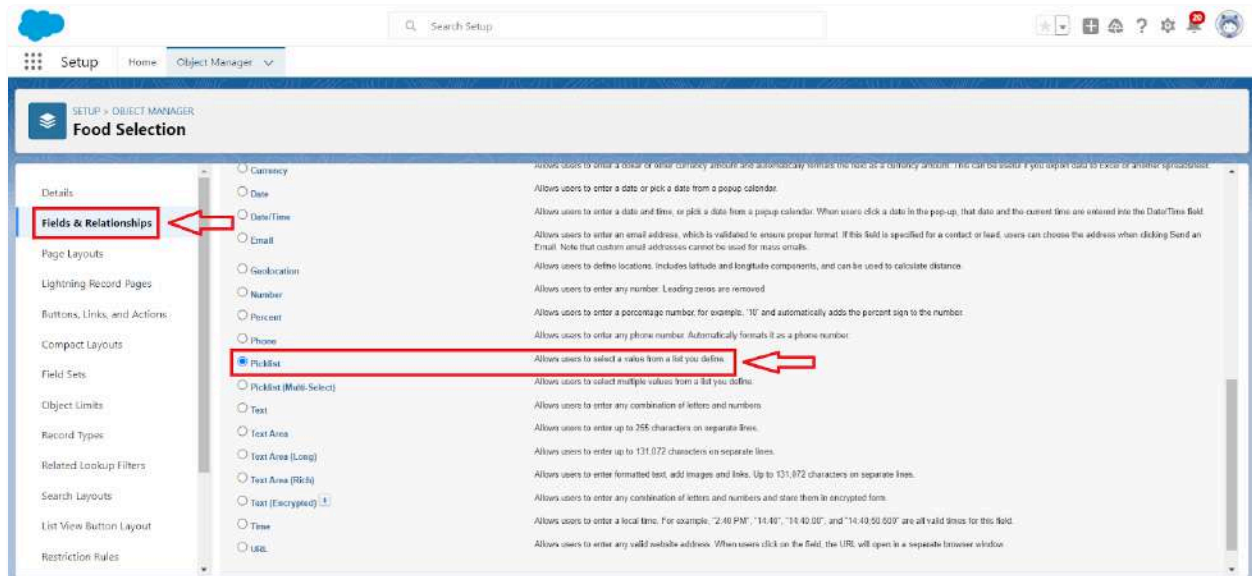


Fields & Relationships

10 Items, 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(Customer)		✓
Select Breakfast	Select_Breakfast__c	Picklist	Breakfast	
Select dinner	Select_dinner__c	Picklist	Dinner	

2. Select Data Type as a "Picklist"



Fields & Relationships

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

☐ Currency

☐ Date

☐ Date/Time

☐ Email

☐ Geolocation

☐ Number

☐ Percent

☐ Phone

☒ Picklist

☐ Picklist (Multi-Select)

☐ Text

☐ Text Area

☐ Text Area (Long)

☐ Text Area (Rich)

☐ Text (Encrypted)

☐ Time

☐ URL

Allows users to enter a date or enter currency directly and automatically formats the text as a currency amount. This can be useful if you prefer not to enter or calculate spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

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

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

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

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

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

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

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

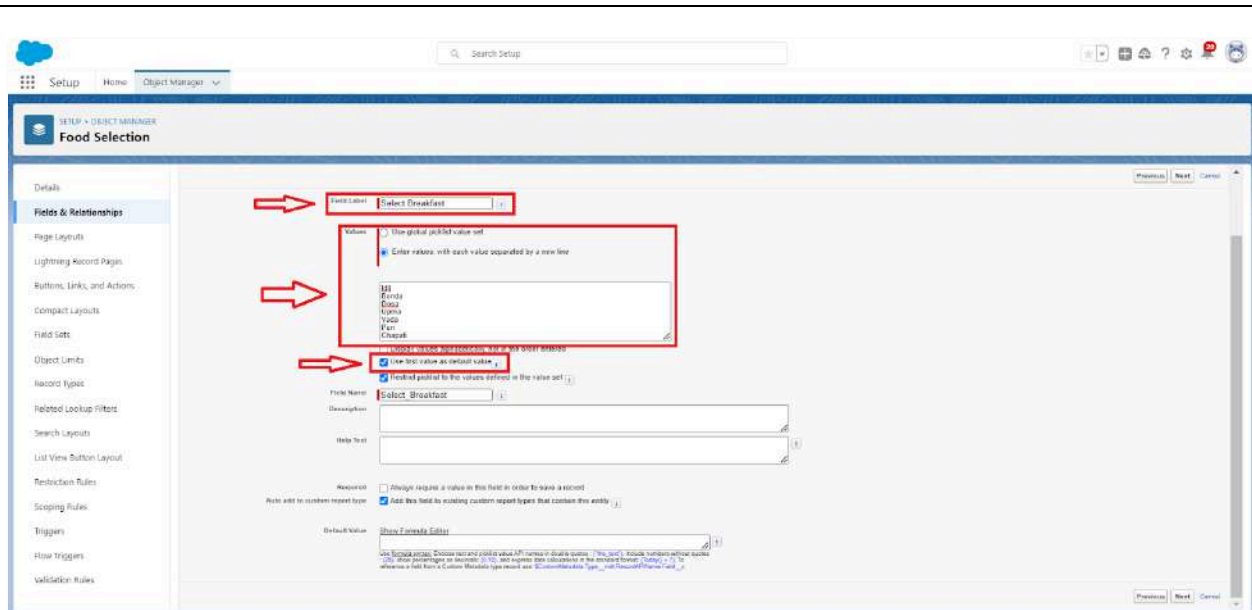
Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:46 PM", "14:46", "14:40:00", and "14:40:50.000" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.



3. Fill the Above as following:

- Field Label: Select Breakfast
 - Under Value - Enter values, with each value separated by a new line
1. Idli
 2. Bonda
 3. Dosa
 4. Upma
 5. Vada
 6. Puri
 7. Chapati
- Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.

Field Dependency:

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

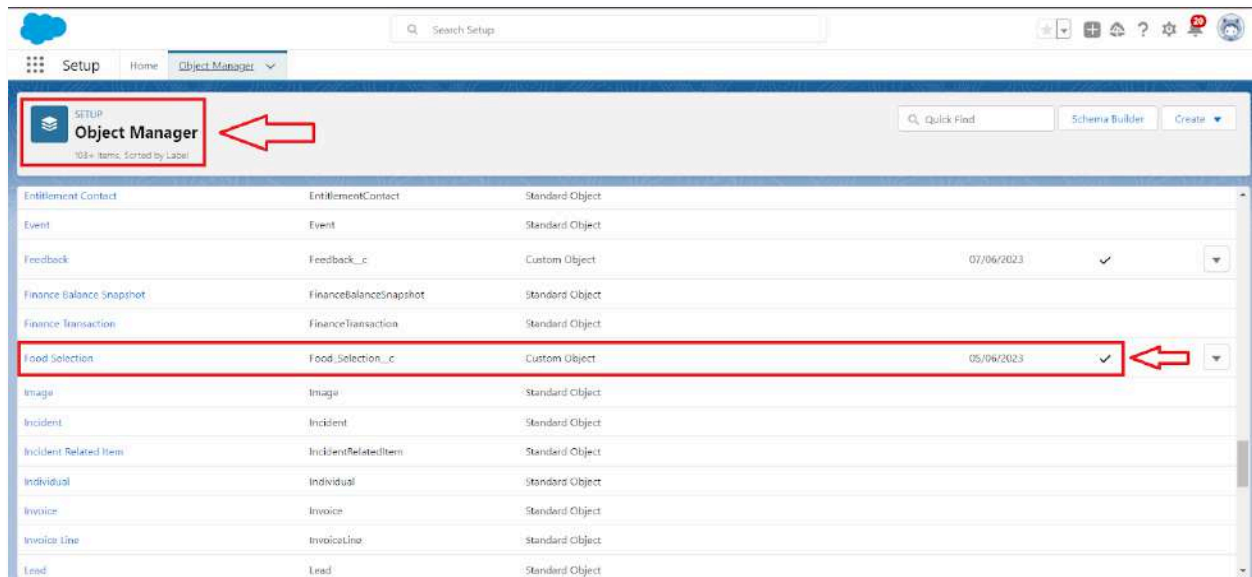
Need to use Field Dependency:

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

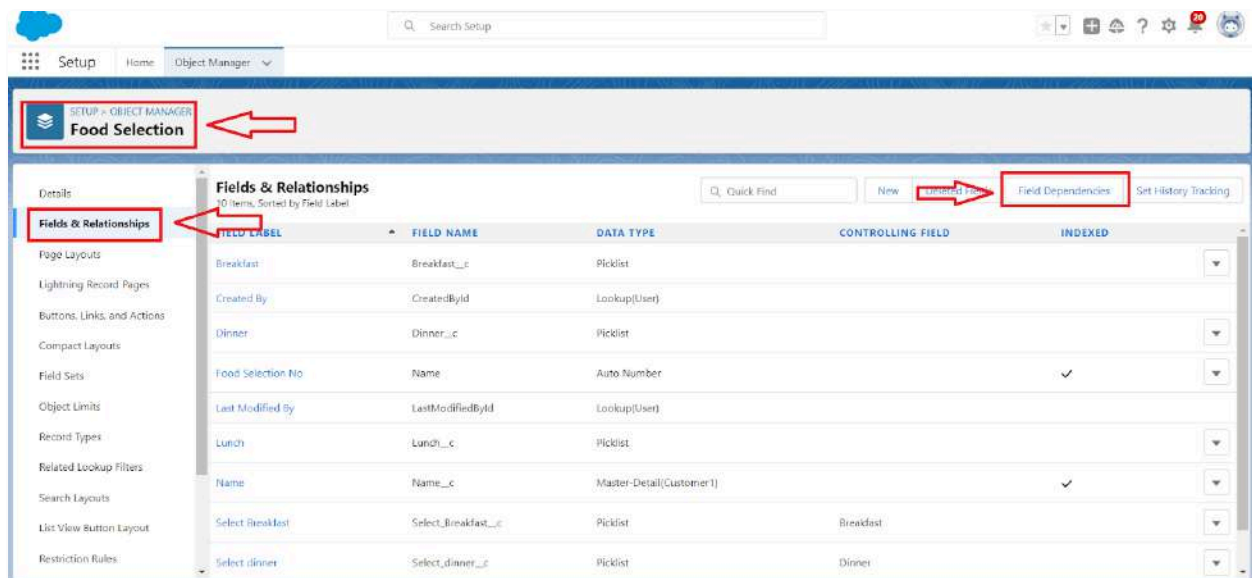
Picklist.

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

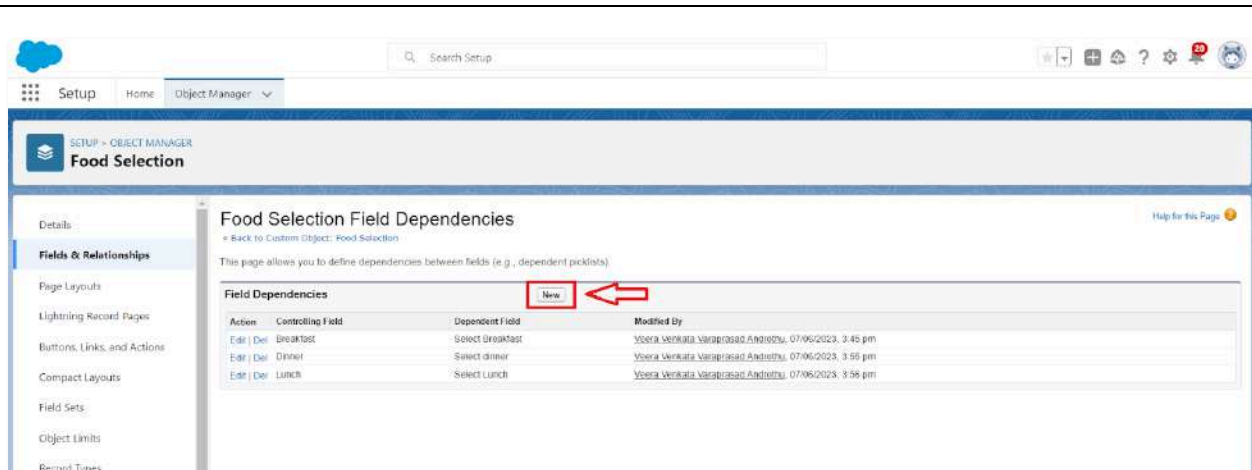
1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.



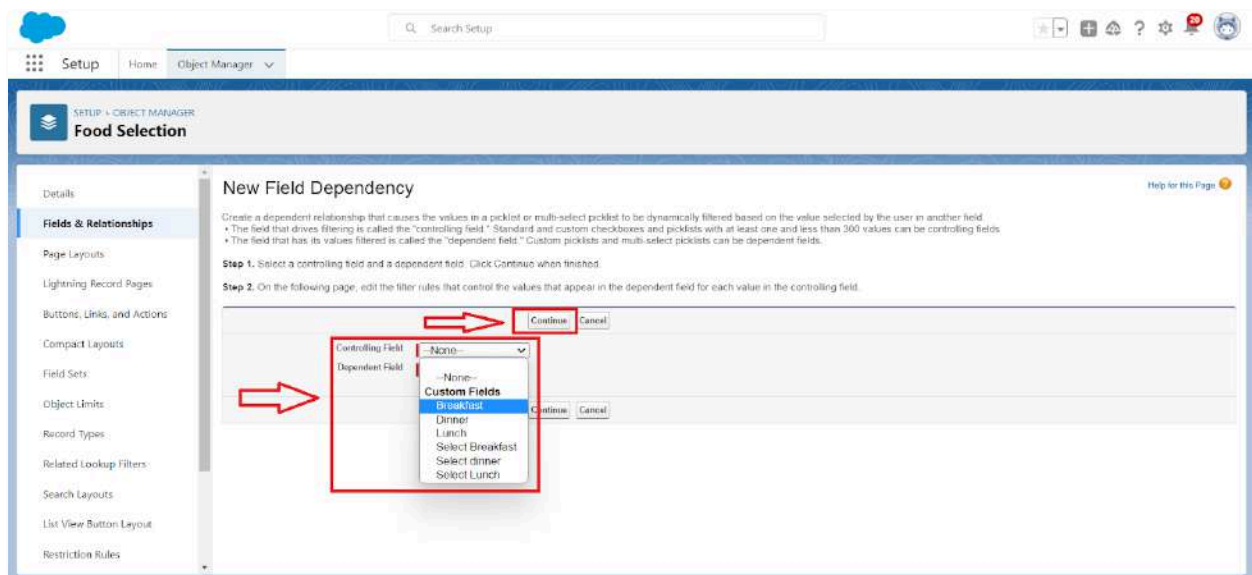
2. Now Click on fields & relationships and Click on Field Dependencies



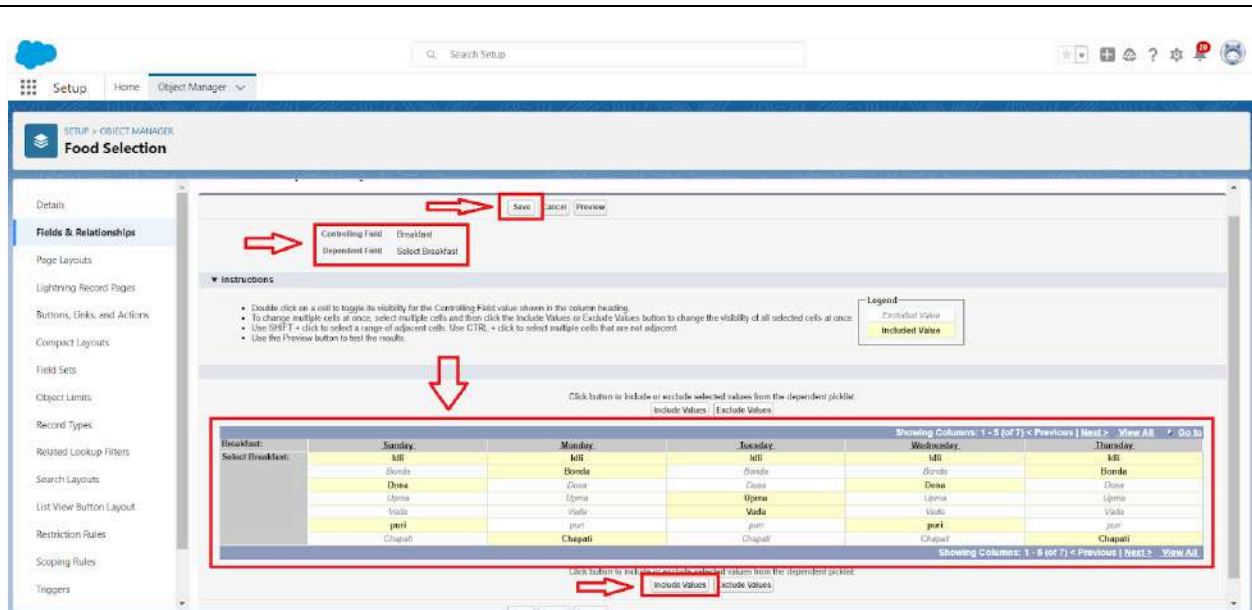
3. Now Click on New Option



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



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



4. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar ? click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data Type as a "Picklist"
4. Fill the Above as following:
 - Field Label: Lunch
 - Under Value - Select the Use global picklist value set
 - Under the drop down select the Custom Picklist Values
 - Select required
 - Click on Next > Next > Save and new.

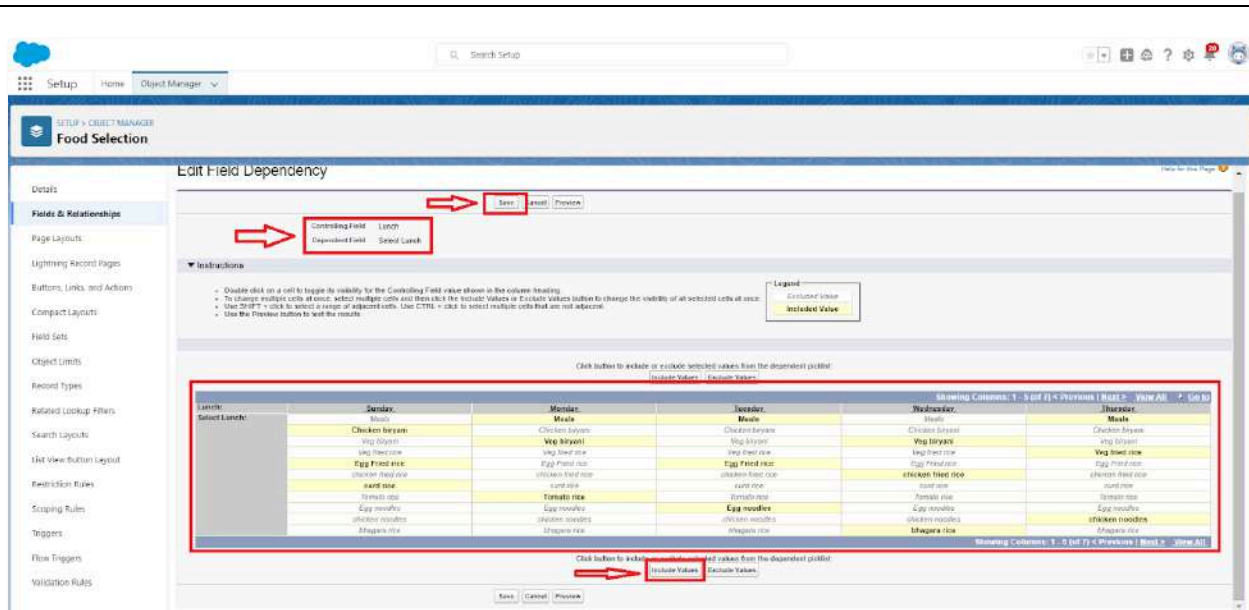
5. To create fields in an object:

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

2. Chicken biryani
 3. Veg biryani
 4. Veg fried rice
 5. Egg fried rice
 6. Chicken fried rice
 7. Curd rice
 8. Tomato rice
 9. Egg noodles
 10. Chicken Noodles
 11. Bhagara rice
- Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.

To create a Field dependencies for Lunch and Select Lunch.

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now Click on fields & relationships and Click on Field Dependencies
3. Now Click on New Option
4. Under Controlling Field:Lunch, Dependent Field: Select Lunch and Click on Continue
5. Under the Sunday Ctrl and select the Picklist values Chicken biryani, Egg fried rice, curd rice and Click on Include Values in such a way that do for the remaining days and click on save.



6. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Dinner
 - Under Value - Select the Use global picklist value set
 - Under the drop down select the Custom Picklist Values
 - Select required
 - Click on Next > Next > Save and new.

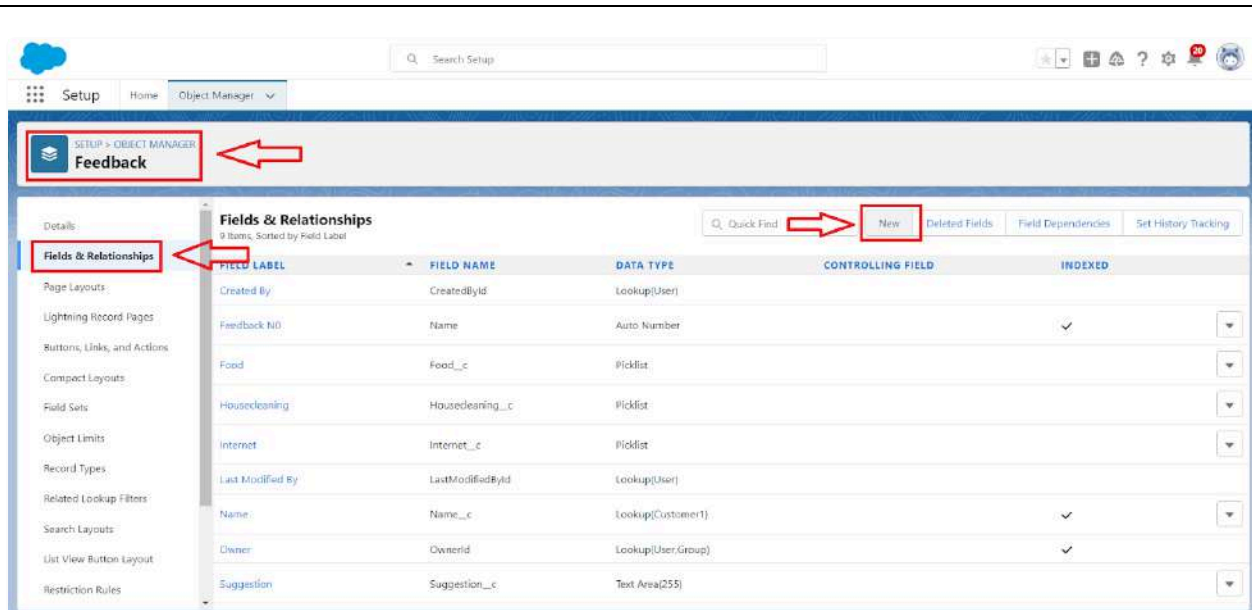
7. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Select Dinner
 - Under Value - Enter values, with each value separated by a new line

1. Meals
2. Chicken biryani
3. Veg biryani
4. Veg fried rice
5. Egg fried rice
6. Chicken fried rice
7. Curd rice
8. Tomato rice
9. Egg noodles
10. Chicken Noodles
11. Bhagara rice
12. Select Checkbox Use First value as default Value
13. Click on Next > Next > Save and new.

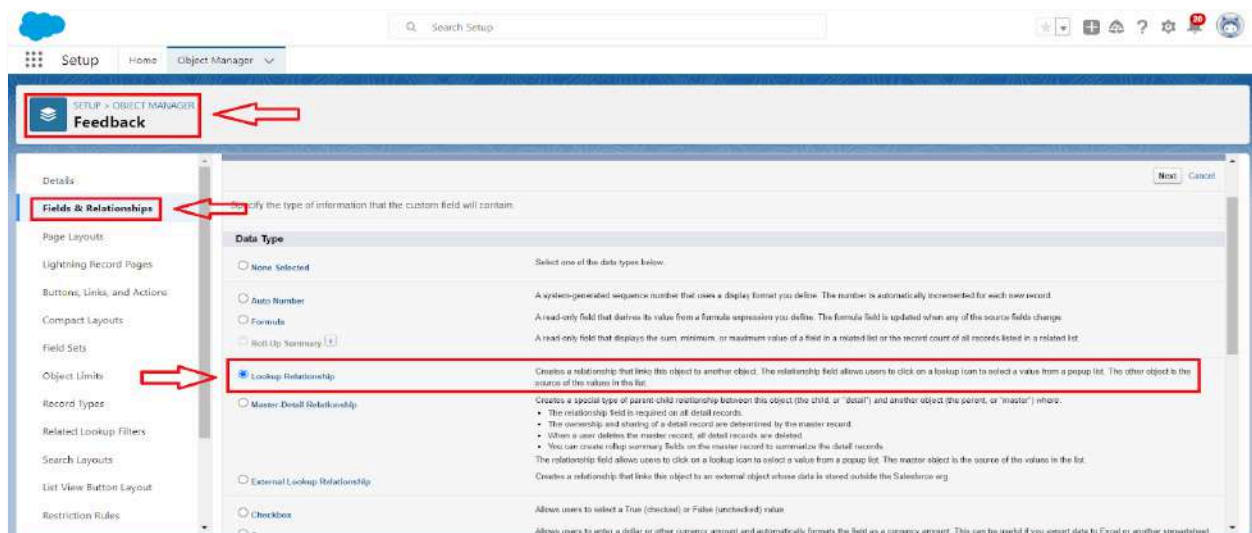
To create a Field dependencies for Dinner and Select Dinner.

14. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
15. Now Click on fields & relationships and Click on Field Dependencies
16. Now Click on New Option
17. Under Controlling Field: Dinner, Dependent Field: Select Dinner and Click on Continue
18. Under the Sunday Ctrl and select the Picklist values Chicken biryani, curd rice, Chicken noodles and Click on Include Values in such a way that do for the remaining days and click on save.

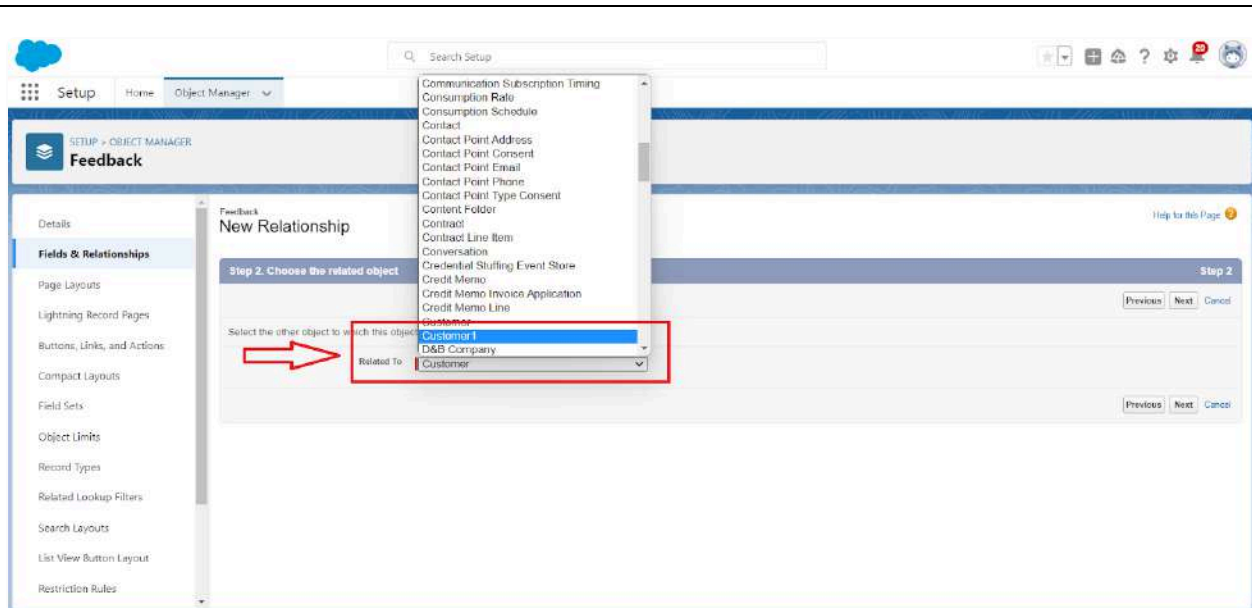


3. Select Data Type as a “Lookup Relationship”

4. Click on Next

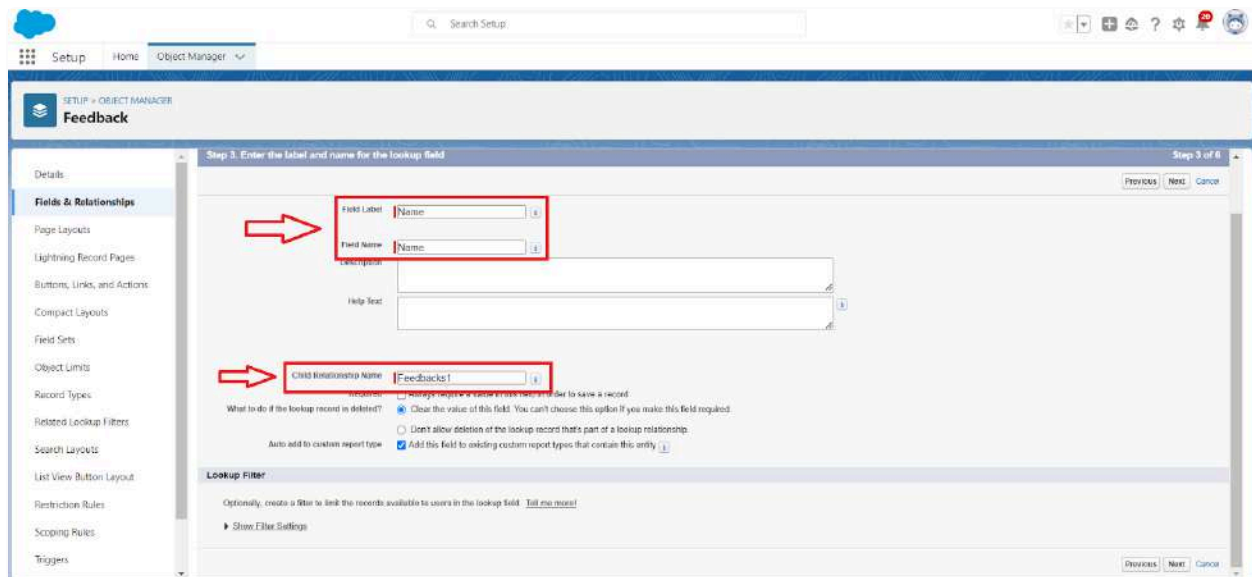


5. Click on the Related to drop down and Select the Customer1 object and click on Next



6. Fill the Above as following:

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



2. To create Another fields in an Same object:

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

Setup Home Object Manager

Object Manager
103+ Items, Sorted by Label

Quick Find Schema Builder Create

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

07/06/2023 ✓

05/06/2023 ✓

https://testmartbridge-2c6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/10150000032G02/FeedbackAndRelationships/view

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

Setup Home Object Manager

Feedback

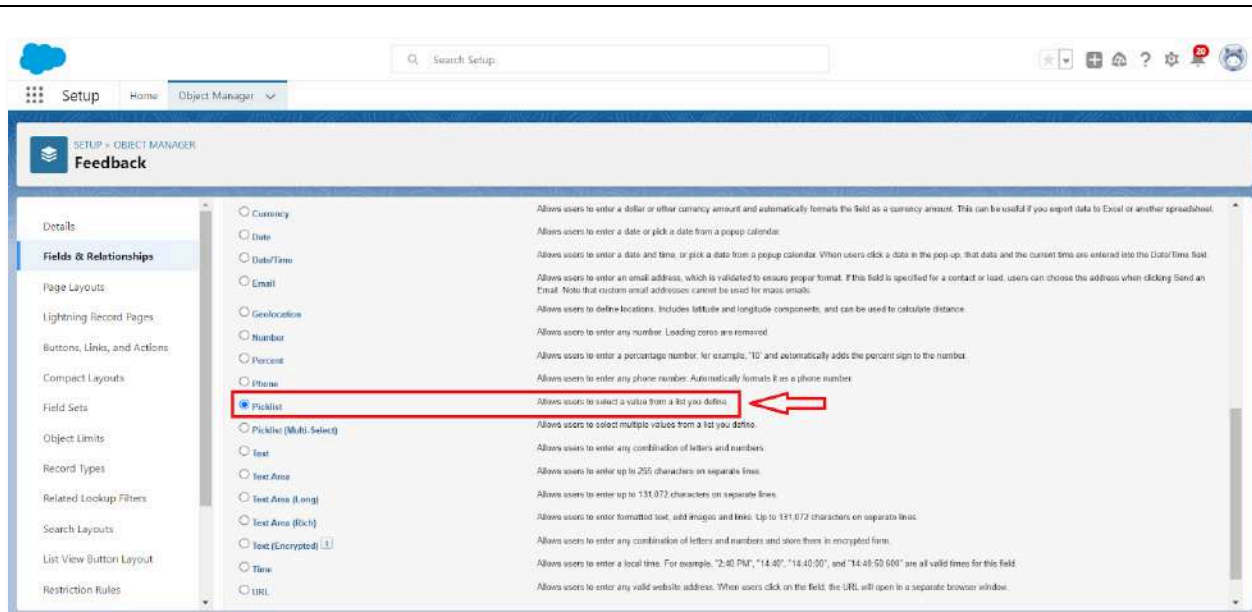
Details

Fields & Relationships
9 Items, Sorted by Field Label

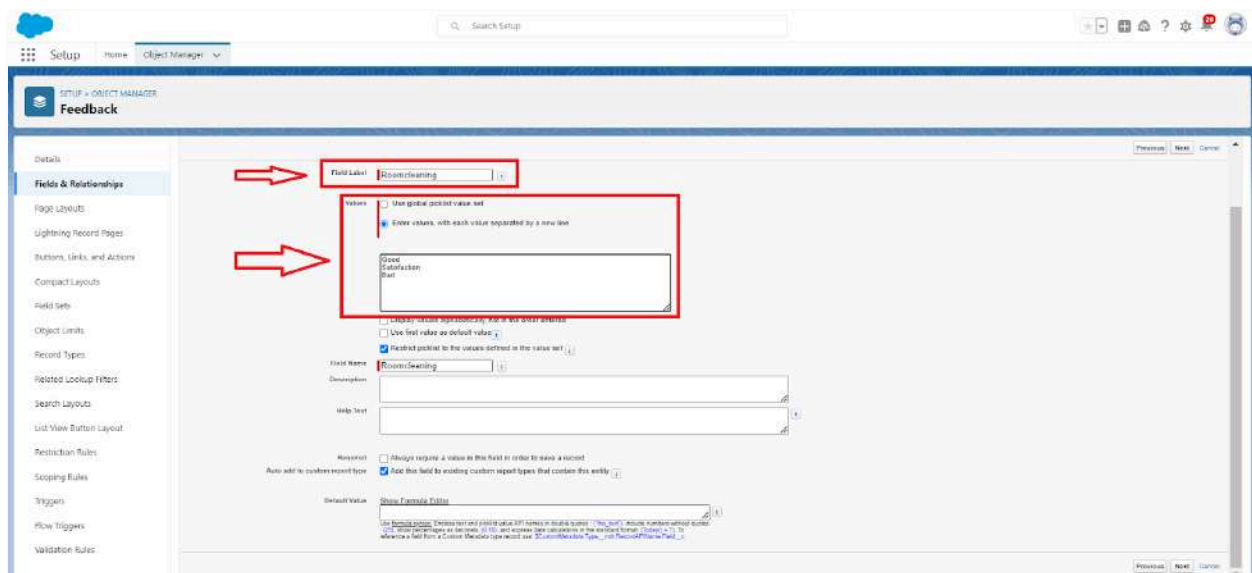
Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback ID	Name	Auto Number		✓
Food	Food__c	Picklist		
Housecleaning	Housecleaning__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer1)		✓
Owner	OwnerId	Lookup(User.Group)		✓
Suggestion	Suggestion__c	Text Area(255)		

3. Select Data Type as a "Picklist"



4. Click on Next



5. Fill the Above as following:

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

3. To create a Another Fields in an Same Object

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

4. To create a Another Fields in an Same Object

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

5. To create a Another Fields in an Same Object

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data Type as a "Text area"

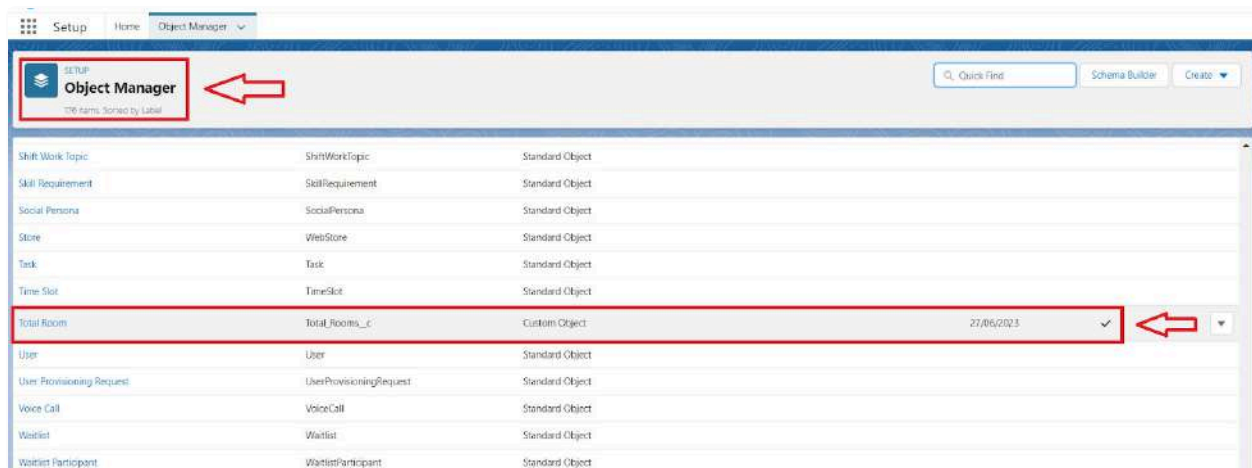
4. Click on Next
5. Fill the Above as following:
 - Field Label: Suggestion
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

Activity 6 :

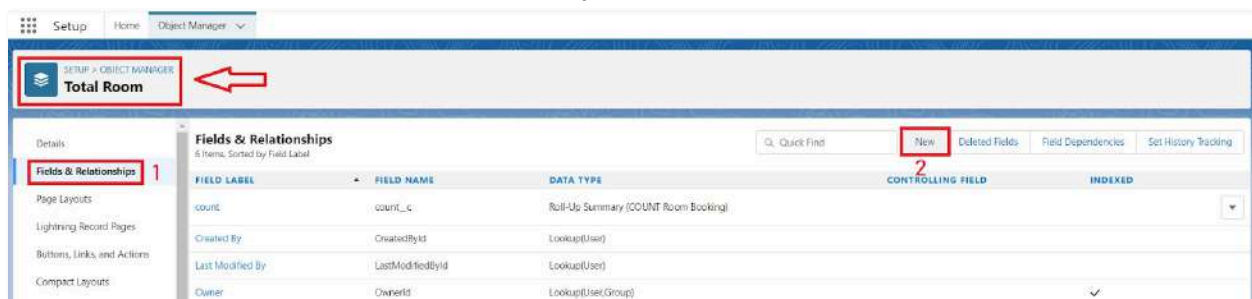
Creation of fields for the Total Rooms object

1. To create fields in an object:

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



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



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

4. Fill the Above as following:
5. Field Label: Rooms Available
6. Field Name : It's gets auto generated
7. Select the Formula Return Type as "Number"
8. Select the Decimal places as "0" and Click on Next

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

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

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

TASK 6 - Validation Rule

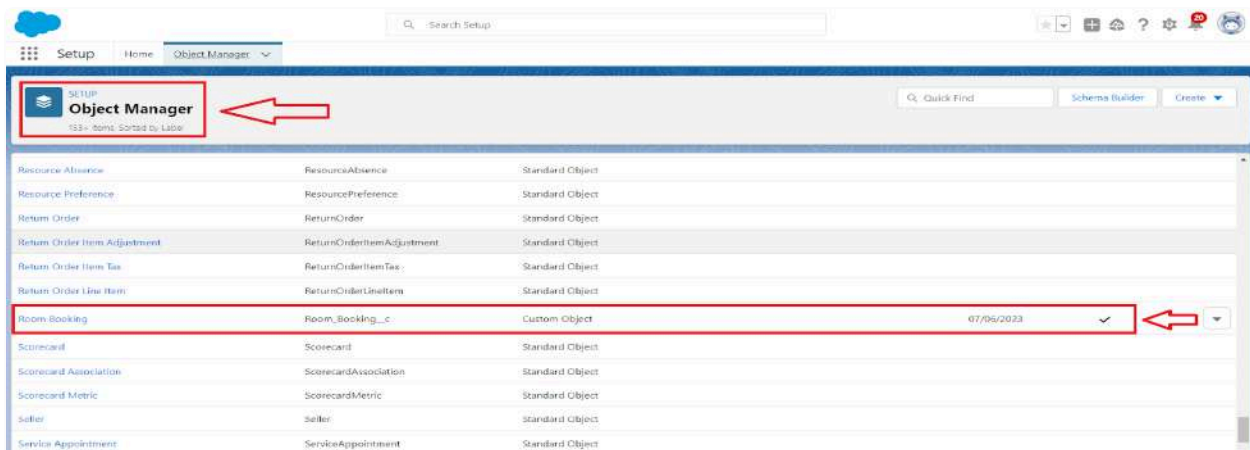
Introduction :

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Activity 1 :

create a validation rule to an Room Booking Object

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



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

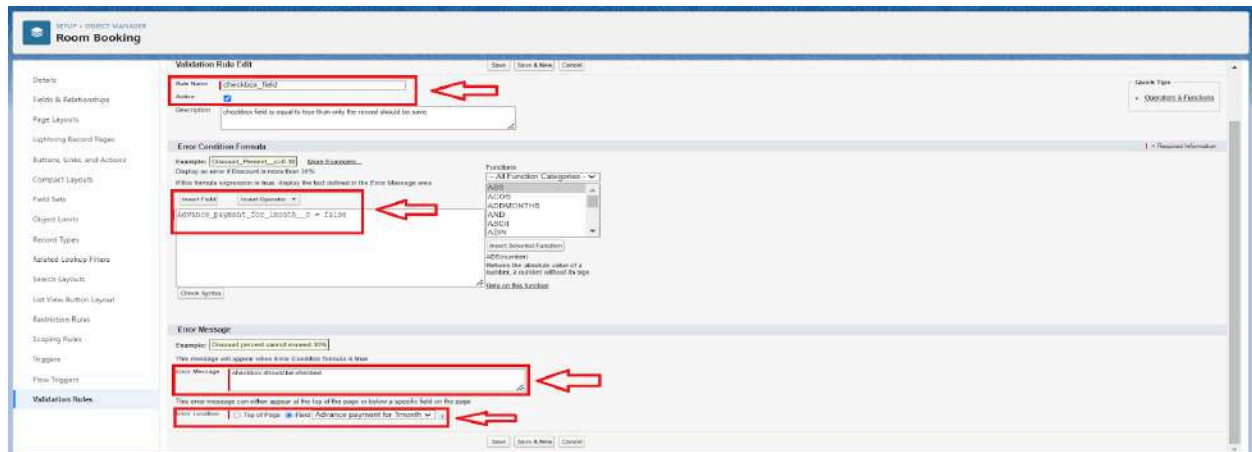


3. Enter Rule name "checkbox field" and make the validation should be Active.

4. Enter the formula in the formula Box "Advance_payment_for_1month__c = false" and check for syntax error.

5. Enter the error message "Checkbox should be checked"

6. Select error location as field(Advance payment for 1month)



7. Click on save.

Activity 2 :

create a Another validation rule to an Room Booking Object

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

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

3. Enter Rule name "check in rule" and make the validation should be Active.

4. Enter the formula in the formula Box “ Check_in__c = False ” and check for syntax error.
5. Enter the error message “Check box should be checked”
6. Select error location as field(Check in)

The screenshot shows the Salesforce Rule Editor interface. The 'Rule Name' field is highlighted with a red box and labeled '1'. The 'Error Condition Formula' section shows the formula 'Check_in__c = False' entered in the 'Insert Field' box, with the 'Insert Operator' dropdown set to '='. This area is highlighted with a red box and labeled '2'. The 'Error Message' section shows the message 'Check box should be checked' entered in the 'Error Message' field, highlighted with a red box and labeled '3'. The 'Error Location' dropdown is set to 'Field: Check in', highlighted with a red box and labeled '4'. The 'Check Syntax' button is visible at the bottom left of the formula section.

7. Click on save.

TASK 7 - Profile

Introduction :

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager

- Standard User
- System Administrator.

We cannot delete standard ones

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

2. Custom Profiles:

Custom ones defined by us.

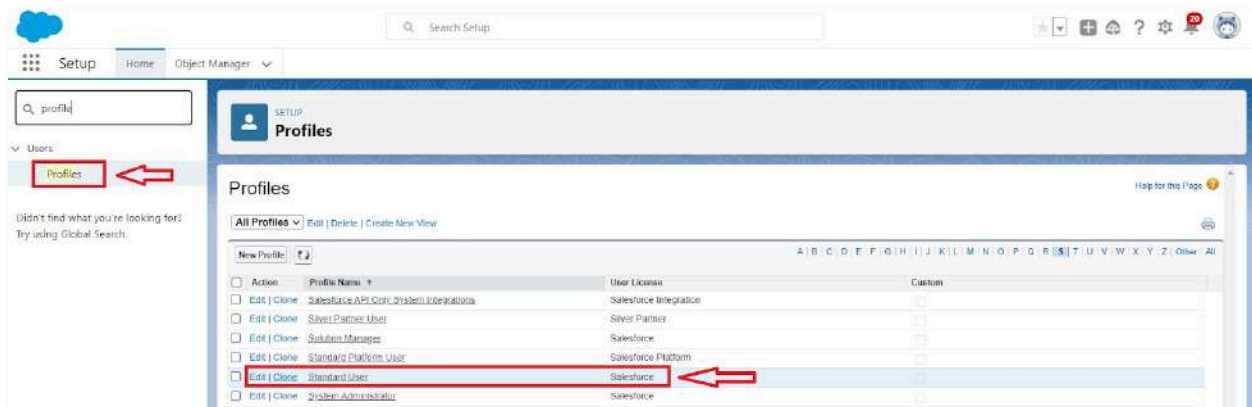
They can be deleted if there are no users assigned with that particular one.

Activity 1 :

Custom user Profile

To create a new profile:

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



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

Clone Profile

Enter the name of the new profile:

You must select an existing profile to clone from.

Existing Profile	User License	Standard User
Profile Name	Custom user	

Save **Cancel**

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.

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

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

Session Settings

Session Times Out After: 8 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifespan: ☐

5. Scroll down and Click on Save.

Activity 2 :

Custom platform user1

To create a new profile:

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard platform User)
2. Enter profile name (Custom platform User1) > Save.
3. While still on the profile page, then click Edit.

4. Scroll down to Custom Object Permissions and Give only Read access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

The screenshot displays the 'Custom Object Permissions' configuration interface. It features two tables, each with a red box highlighting the 'Read' column. The first table lists 'Customers', 'Feedbacks', and 'Food Selections'. The second table lists 'Payments', 'Room Bookings', and 'Total Rooms'. Below the tables are sections for 'Session Settings' and 'Password Policies'.

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

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

5. Scroll down and Click on Save.

Activity 3 :

Custom platform user2

To create a new profile:

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

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

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None--

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

5. Scroll down and Click on Save.

TASK 8 - Roles

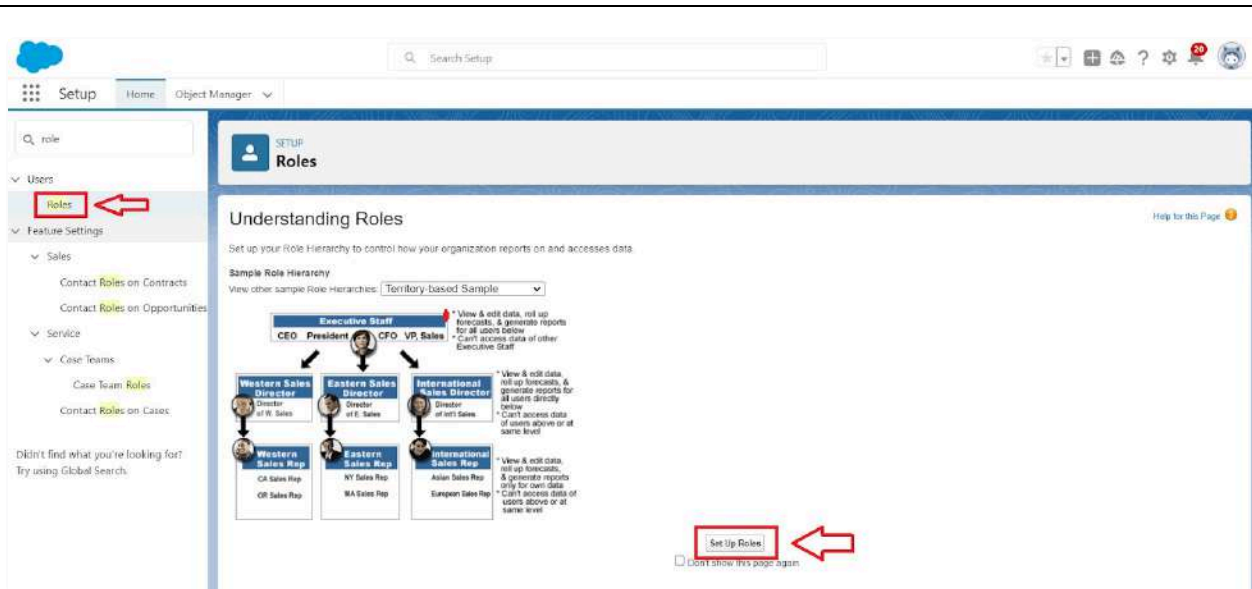
Introduction :

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

Activity 1 :

Marketing Role

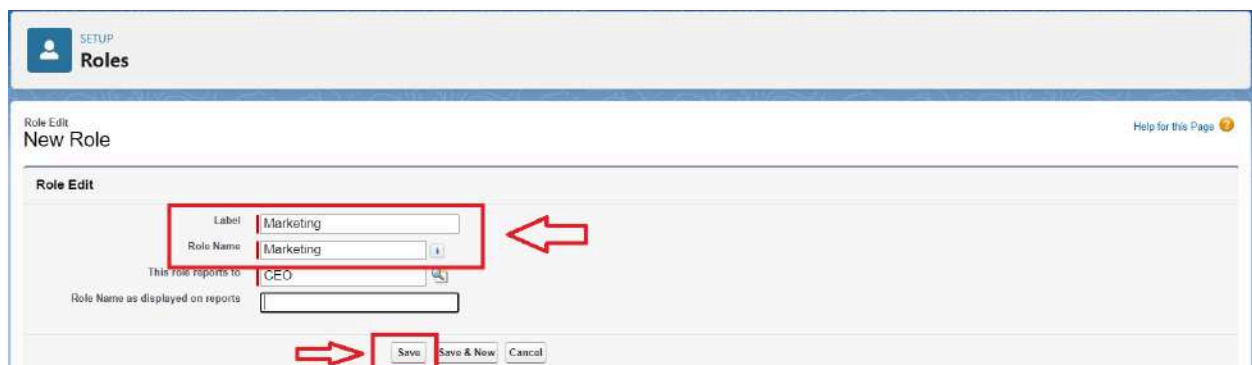
1. Go to quick find > Search for Roles > click on set up roles.



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



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



4. Then click on Save.

Activity 2 :

Receptionist Role

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

Role Edit
New Role

Role Edit

Label: Receptionist

Role Name: Receptionist

This role reports to: CEO

Role Name as displayed on reports:

Save Save & New Cancel

4. Then click on Save.

TASK 9 - Users

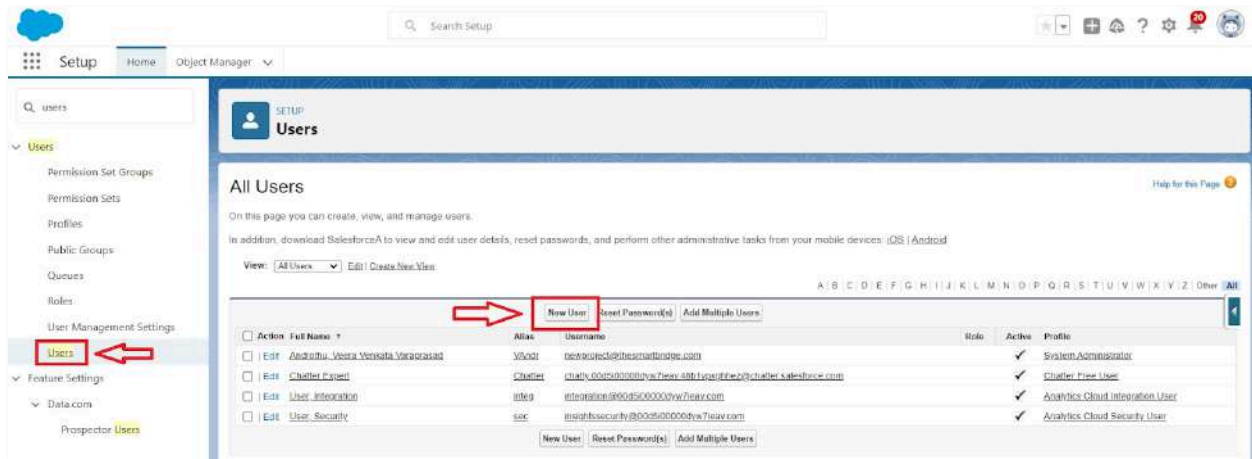
Introduction :

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

Activity 1 :

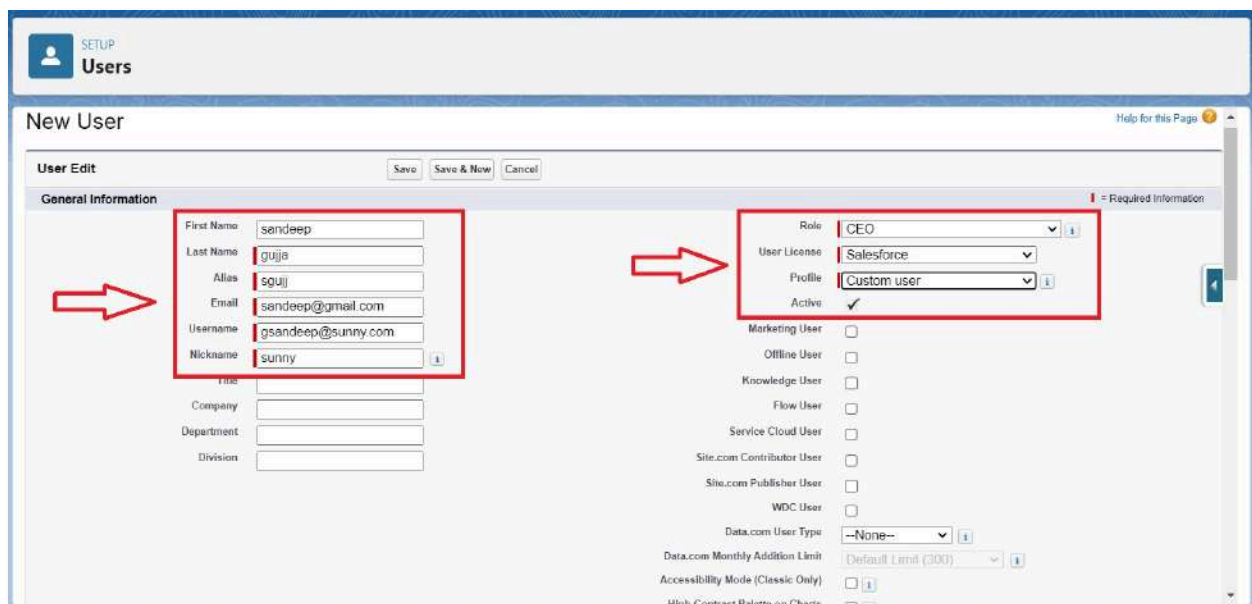
Create User

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



2. Fill in the fields

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



3. save.

Activity 2 :

Create Another User

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

The screenshot shows the 'User Edit' page for 'abhilash garapati'. The 'General Information' tab is active. The 'First Name' field is highlighted with a red box. The 'Last Name' field is 'garapati'. The 'Alias' field is 'egara'. The 'Email' field is 'abhi@gmail.com'. The 'Username' field is 'gabhi@tech.com'. The 'Nickname' field is 'abhi'. The 'Role' is 'Marketing'. The 'User License' is 'Salesforce Platform'. The 'Profile' is 'Customer Platform user1'. The 'Active' checkbox is checked. The 'Save' button is highlighted with a red box. Red arrows point to the 'Save' button and the 'General Information' fields.

3. save

Activity 3 :

Create Another User

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

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains a search bar and a list of setup categories: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospect User. The main content area is titled 'New User' and contains a 'User Edit' form. The form has a 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, and Nickname. The 'Role' is set to 'Receptionist', 'User License' is 'Salesforce Platform', and 'Profile' is 'Custom Platform user2'. The 'Active' checkbox is checked. On the right, there are checkboxes for various user types: Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Sites.com Contributor User, Sites.com Publisher User, and YDC User. At the bottom, there are dropdowns for 'Data.com User Type' (set to 'None') and 'Data.com Monthly Addition Limit' (set to 'Default Limit (000)'). A red box highlights the 'General Information' fields, and another red box highlights the 'Role', 'User License', and 'Profile' fields. Red arrows point from the left sidebar to the 'General Information' box and from the 'General Information' box to the 'Role' box.

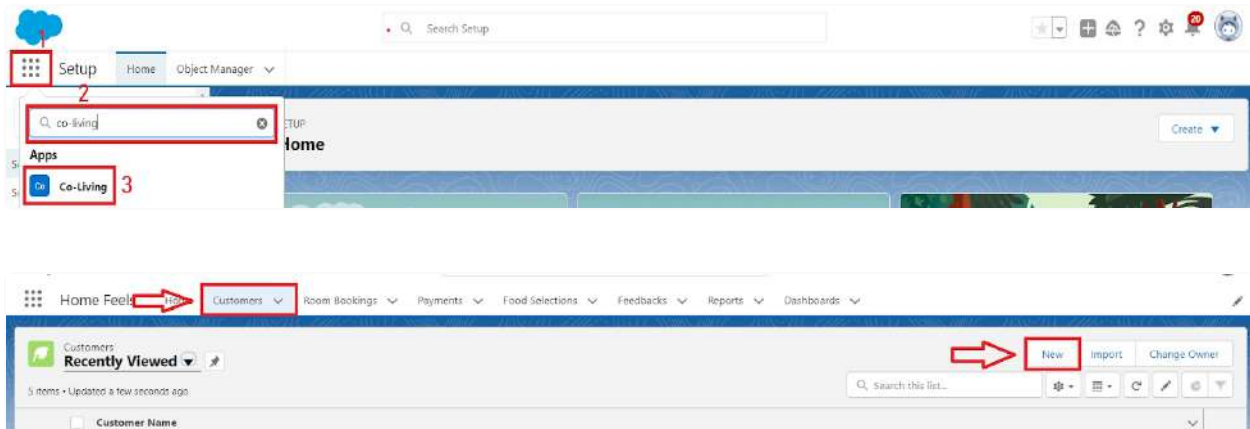
3. Save

TASK 10 -User Adoption

Activity 1 :

Create a Record (Customers)

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



3. Click on the Customers Tab.

New Customer1

* = Required Information

Information

*Customer Name	Owner
<input type="text"/>	Veera Venkata Varaprasad Androthu
*Phone no	*Permanent Address
<input type="text" value="9702874232"/>	<input type="text" value="Hyderabad"/>
Email id	*current Status
<input type="text" value="tech@gmail.com"/>	<input type="text" value="Employee"/>

Cancel Save & New **Save**

4. Click new and fill details & Save

Activity 2 :

View a Record (Customers)

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

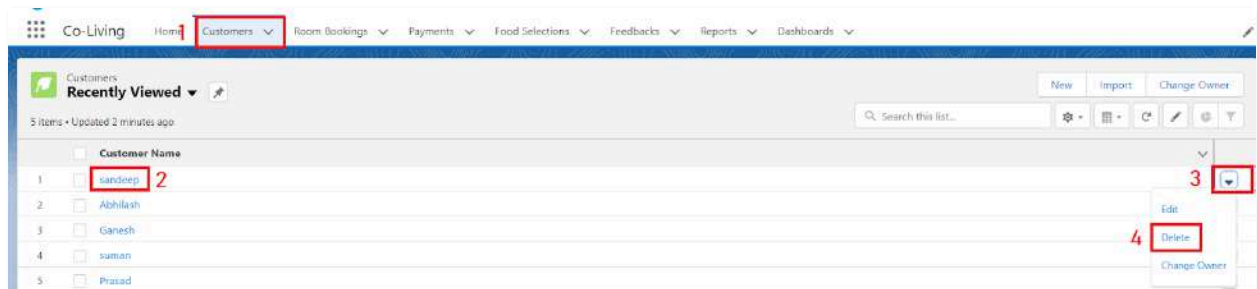
The screenshot displays the Home Feels application interface. At the top, there is a search bar and a navigation menu with options: Co-Living, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Customers' tab is selected. Below the navigation bar, the 'Customers' section is visible, showing a list of customers. The customer 'sandeep' is highlighted. A red box highlights the 'Customers' tab in the navigation bar and the 'sandeep' record in the list. Below the list, the 'Customer1 sandeep' record is shown in detail. A red box highlights the 'Details' tab and the customer information fields.

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

Activity 3 :

Delete a Record (Customers)

1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on the Customers Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



TASK 11 -Reports

Introduction :

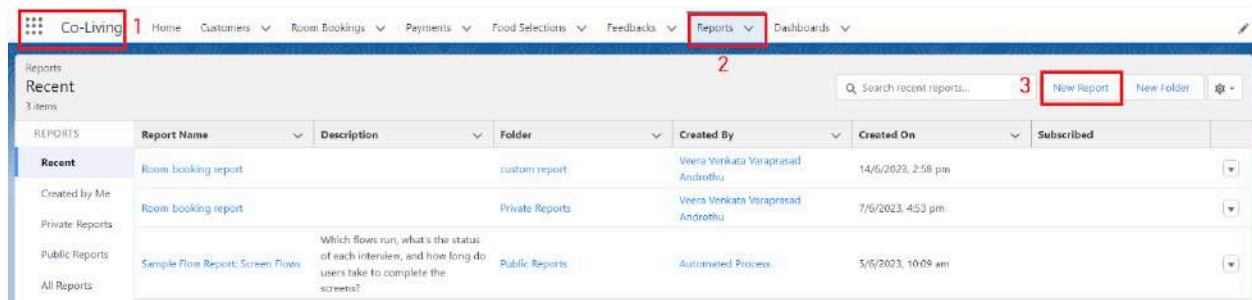
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

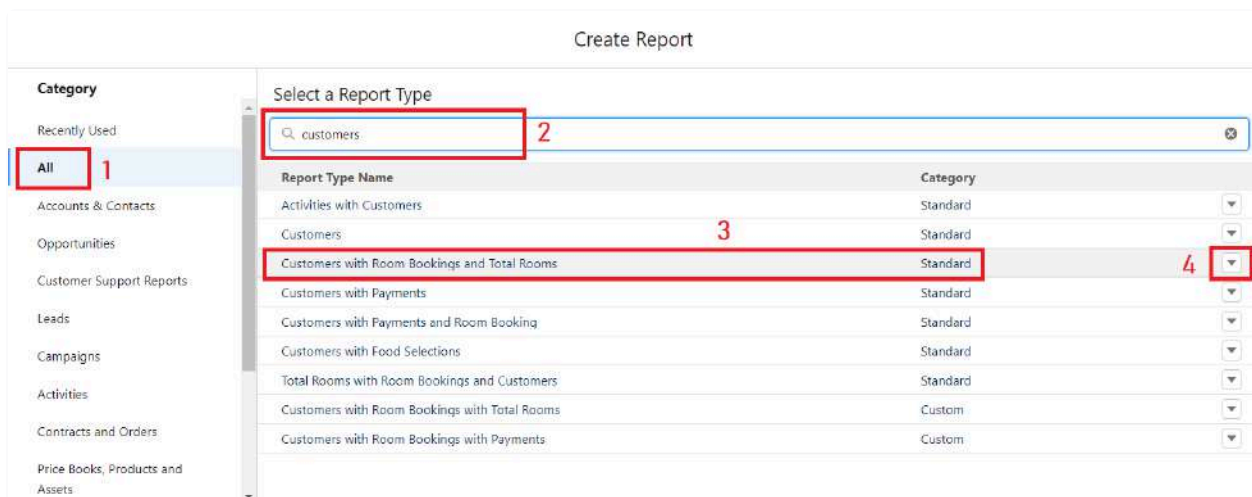
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Activity 1 : Create Report

1. Go to the app > click on the reports tab
2. Click New Report.



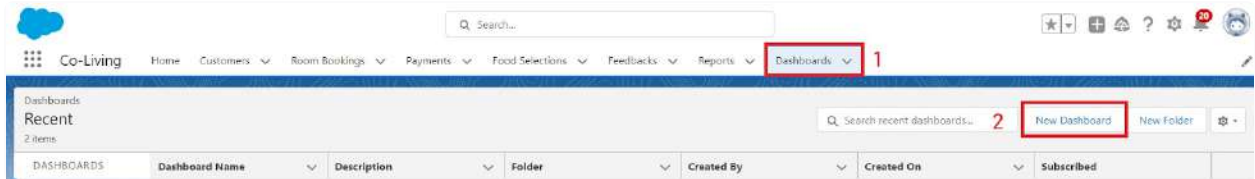
3. Select report type from category or from report type panel or from search panel
"Customers with Room Bookings with Total Rooms " > click on start report.



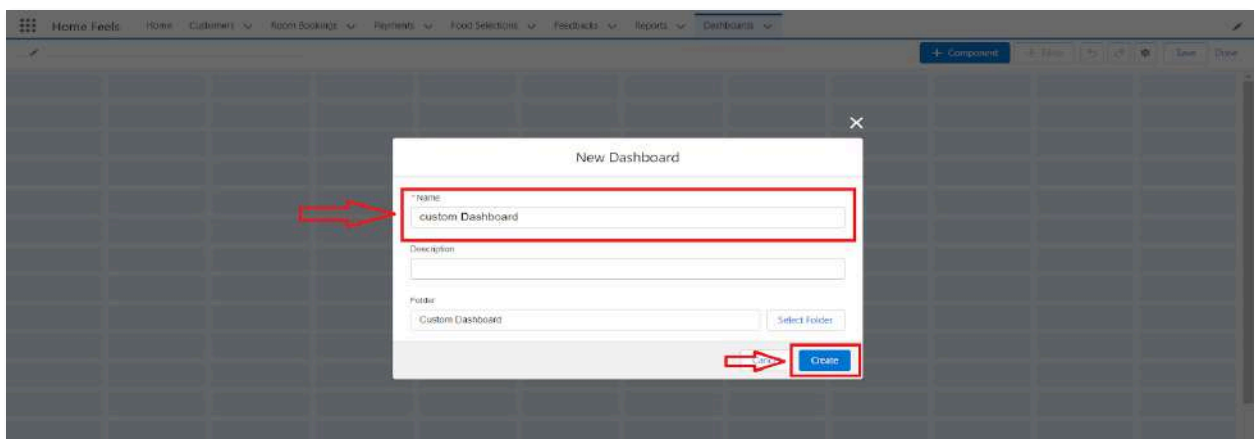
4. Customize your report
5. Add fields from left pane as shown below

Activity 1 : Create Dashboard

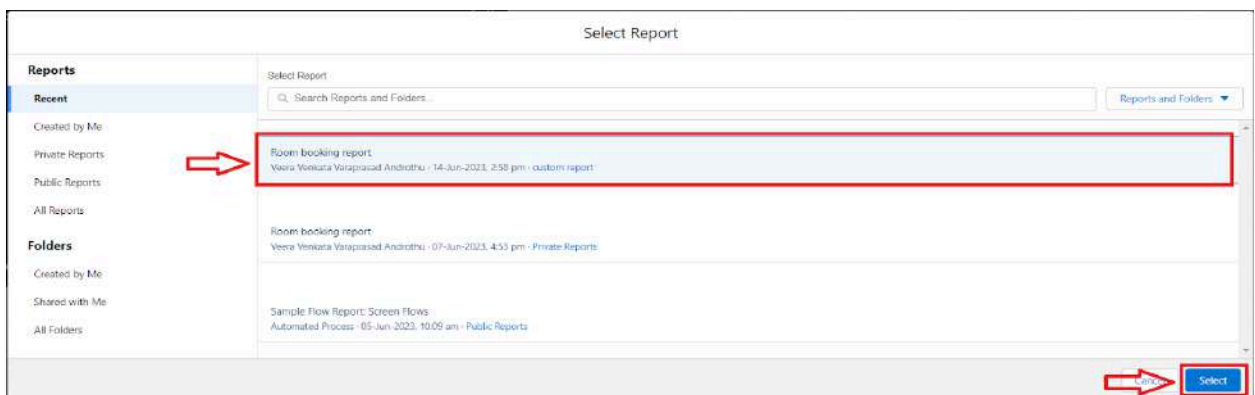
1. Go to the app > click on the Dashboard tabs and click on new Dashboard



2. Give a Name and click on Create.



3. Select add component.
4. Select a Report Customer with Room Booking and click on select.



Edit Component

Room booking report
Subtitle
Amount
Footer
Legend Position
Right
Component Theme
☐ Light (Dashboard default)
☒ Dark

Preview

Room booking report
Amount
Sum of Amount: ₹156k

₹28k
₹20k
₹34k
₹44k
₹30k

View Report (Room booking report)

Customer Name
Abhilash
Ganesh
Prasad
sandeep
suman

Cancel Update

- Click Add then click on Save and then click on Done.

Activity 2 :

Create Another Dashboard

- Go to the app > click on the Dashboard tabs and click on new Dashboard.
- Give a Name and click on Create.
- Select add component.
- Select a Report Customer with Room Booking with Payments and click on select.
- Click Add then click on Save and then click on Done.

TASK 13 - Flows

Introduction :

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

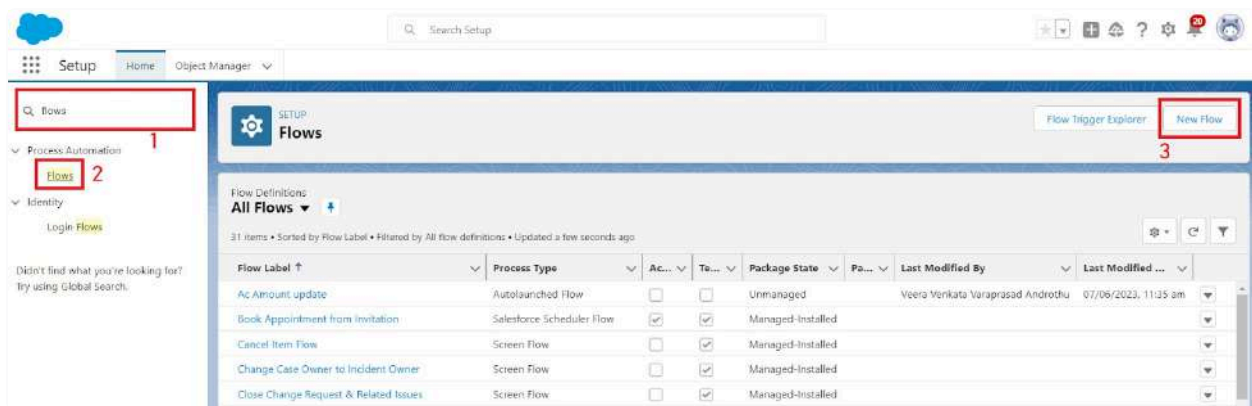
Why do we need to create a flow:

To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

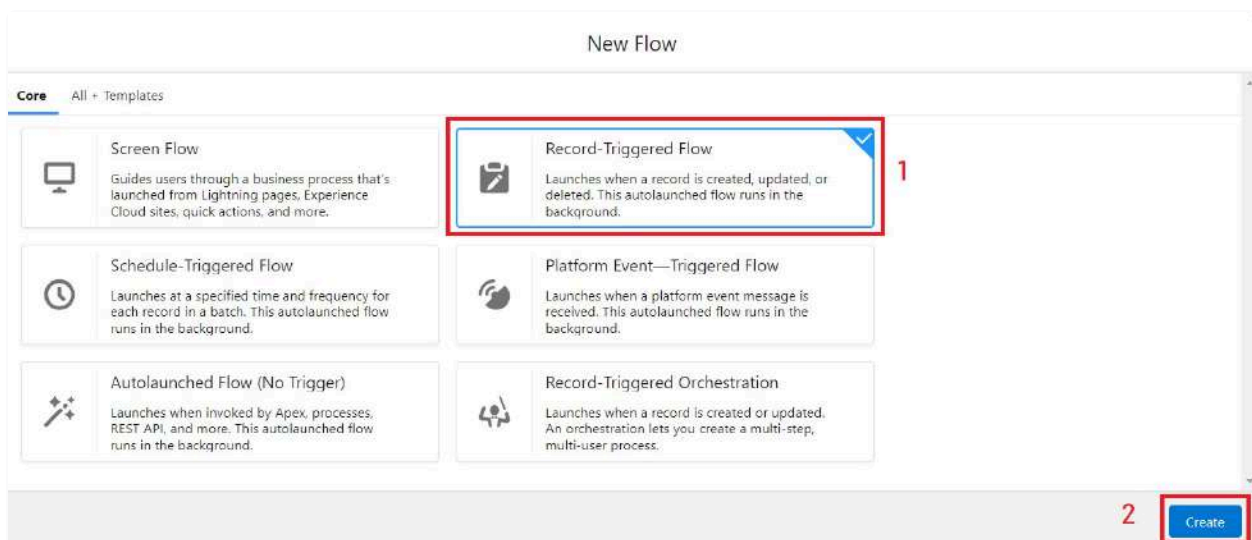
Activity 1 :

Create a Flow

1. Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.



2. Select the Record-triggered flow and Click on Create.



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

Done.

Configure Start

Select Object

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

* Object

Room Booking

1

Configure Trigger

* Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

2

☐ A record is deleted

Set Entry Conditions

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

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

Condition Requirements

None

* Optimize the Flow for:

Fast Field Updates

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

Actions and Related Records

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

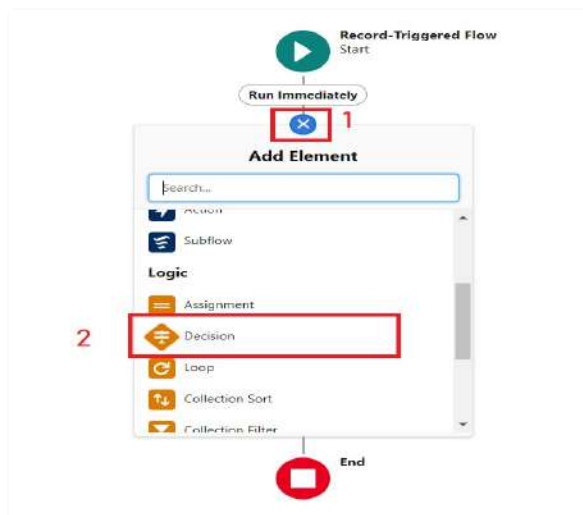
3

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

4

Cancel Done

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.

The screenshot shows the 'New Decision' form. At the top, the 'Label' field is 'Field Should be Update' and the 'API Name' is 'Field_Should_be_Update'. Below this is a 'Description' field. The 'Outcomes' section is active, showing a list of outcomes on the left with 'Single Sharing' selected. The 'OUTCOME ORDER' list has a '+' button. The 'OUTCOME DETAILS' for 'Single Sharing' are shown. The 'Label' is 'Single Sharing' and the 'Outcome API Name' is 'Single_Sharing'. The 'Condition Requirements to Execute Outcome' are set to 'All Conditions Are Met (AND)'. There are two conditions listed: 1. Resource: '\$Record > Room sharing', Operator: 'Equals', Value: 'single sharing'. 2. Resource: '\$Record > AC - 3000', Operator: 'Equals', Value: 'False'. An 'Add Condition' button is at the bottom. The form has 'Cancel' and 'Done' buttons at the bottom right.

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.

The screenshot shows the 'OUTCOME ORDER' section on the left with a '+' button highlighted by a red box and the number '3'. The main 'OUTCOME DETAILS' section is labeled with a red '1'. It contains a 'Label' field with 'Double sharing' and an '* Outcome API Name' field with 'Double_sharing'. Below this is a 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)'. A red box labeled '2' highlights the conditions section, which includes two rows: the first with Resource '\$Record > Room sharing', Operator 'Equals', and Value 'Double sharing'; the second with Resource '\$Record > AC - 3000', Operator 'Equals', and Value 'False'. A 'Delete Outcome' button is in the top right.

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.

The screenshot shows the 'OUTCOME ORDER' section on the left with a '+' button highlighted by a red box and the number '3'. The main 'OUTCOME DETAILS' section is labeled with a red '1'. It contains a 'Label' field with 'Triple Sharing' and an '* Outcome API Name' field with 'Triple_Sharing'. Below this is a 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)'. A red box labeled '2' highlights the conditions section, which includes two rows: the first with Resource '\$Record > Room sharing', Operator 'Equals', and Value 'Triple sharing'; the second with Resource '\$Record > AC - 3000', Operator 'Equals', and Value 'False'. A 'Delete Outcome' button is in the top right.

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.

The screenshot shows the 'OUTCOME ORDER' and 'OUTCOME DETAILS' sections. In the 'OUTCOME ORDER' list on the left, 'Single Ac' is highlighted with a red box and the number 3. In the 'OUTCOME DETAILS' form, the 'Label' and 'Outcome API Name' fields are both set to 'Single Ac', with a red box and the number 1 around them. Below this, the 'Condition Requirements to Execute Outcome' dropdown is set to 'All Conditions Are Met (AND)' with a red box and the number 2. The main condition area contains two rows: the first row has 'Resource' as '\$Record > Room sharing', 'Operator' as 'Equals', and 'Value' as 'single sharing'; the second row has 'Resource' as 'AND \$Record > AC - 3000', 'Operator' as 'Equals', and 'Value' as '(!\$GlobalConstant.True)'. Both rows are enclosed in a red box with the number 2.

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.

The screenshot shows the 'OUTCOME ORDER' and 'OUTCOME DETAILS' sections. In the 'OUTCOME ORDER' list on the left, 'Double Ac' is highlighted with a red box and the number 3. In the 'OUTCOME DETAILS' form, the 'Label' and 'Outcome API Name' fields are both set to 'Double Ac', with a red box and the number 1 around them. Below this, the 'Condition Requirements to Execute Outcome' dropdown is set to 'All Conditions Are Met (AND)' with a red box and the number 2. The main condition area contains two rows: the first row has 'Resource' as '\$Record > Room sharing', 'Operator' as 'Equals', and 'Value' as 'Double sharing'; the second row has 'Resource' as 'AND \$Record > AC - 3000', 'Operator' as 'Equals', and 'Value' as '(!\$GlobalConstant.True)'. Both rows are enclosed in a red box with the number 2.

13. Enter the Outcome Details Label: Triple Ac, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.

- Value: Select Triple sharing.
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select True.
- Click on Done.

New Decision

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

OUTCOME ORDER +

OUTCOME DETAILS 1 Delete Outcome

*Label Triple Ac *Outcome API Name Triple_Ac

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

Resource	Operator	Value
\$Record > Room sharing	Equals	Triple sharing
AND \$Record > AC - 3000	Equals	True

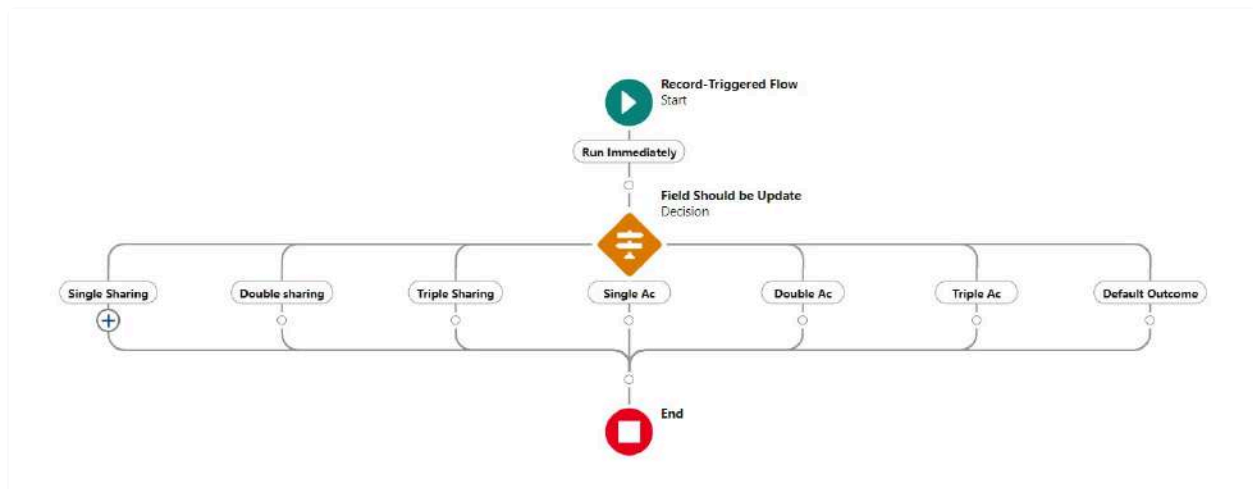
+ Add Condition

When to Execute Outcome

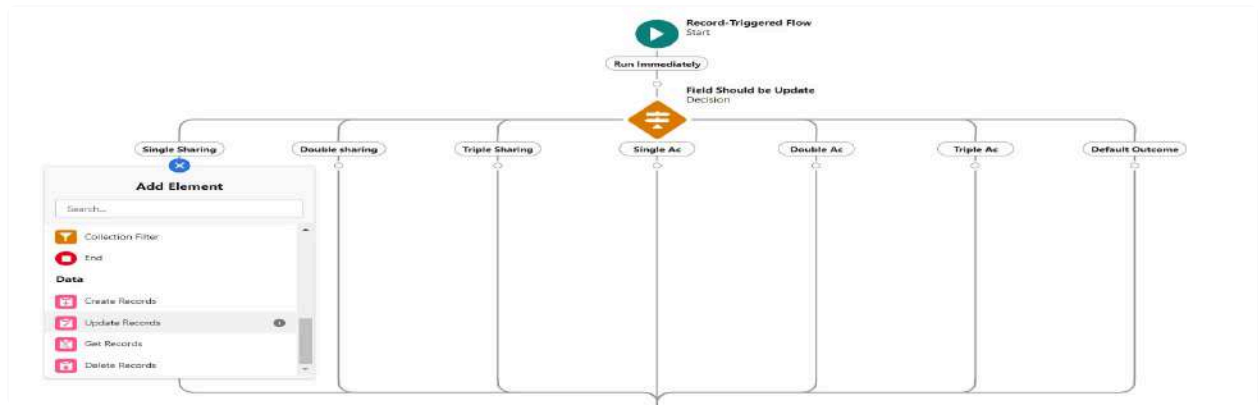
☒ If the condition requirements are met

☐ Only if the record that triggered the flow to run is updated to meet the condition requirements

Cancel **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.

Edit Update Records

Update Salesforce records using values from the flow.

* Label

single

* API Name

single

Description

* How to Find Records to Update and Set Their Values

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



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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field

Amount__c

Value

← 28000



Cancel

Done

16. Enter the update records details

- Label: Double.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 24000.
- Click on Done.

Edit Update Records

Update Salesforce records using values from the flow.

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

* How to Find Records to Update and Set Their Values

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



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

Set Filter Conditions

Condition Requirements to Update Record

Set Field Values for the Room Booking Record

Field	Value
<input type="text" value="Amount_c"/>	<input type="text" value="24000"/>
<input type="button" value="+ Add Field"/>	

Cancel

Done

17. Enter the update records details

- Label: Triple.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 20000.
- Click on Done.

Edit Update Records

Update Salesforce records using values from the flow.

* Label

Triple

* API Name

Triple

Description

* How to Find Records to Update and Set Their Values

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



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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field

Amount__c

Value

20000

+ Add Field

Cancel

Done

18. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label	* API Name
<input type="text" value="single ac1"/>	<input type="text" value="single_ac1"/>
Description <div></div>	

* How to Find Records to Update and Set Their Values

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



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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

Set Field Values for the Room Booking Record

Field	←	Value
<input type="text" value="Amount_c"/>		<input type="text" value="34000"/>
<div>+ Add Field</div>		

Cancel

Done

19. Enter the update records details

- Label: Double ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 30000.
- Click on Done.

Edit Update Records

Update Salesforce records using values from the flow.

* Label	* API Name
<input type="text" value="Double ac1"/>	<input type="text" value="Double_ac1"/>
Description <div></div>	

* How to Find Records to Update and Set Their Values

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



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

Set Filter Conditions

Condition Requirements to Update Record

Set Field Values for the Room Booking Record

Field	Value
<input type="text" value="Amount_c"/>	<input type="text" value="30000"/>
<div>+ Add Field</div>	

Cancel

Done

20. Enter the update records details

- Label: Triple ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 26000.
- Click on Done.

Edit Update Records

Update Salesforce records using values from the flow.

* Label	* API Name
<input type="text" value="Triple ac1"/>	<input type="text" value="Triple_ac1"/>
Description <div></div>	

* How to Find Records to Update and Set Their Values

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



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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

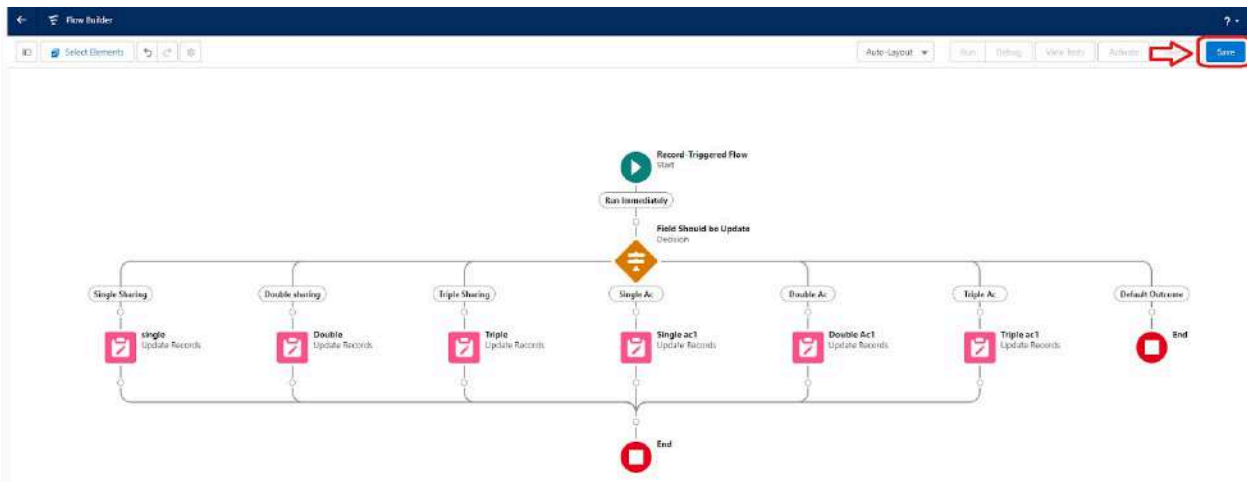
Set Field Values for the Room Booking Record

Field	Value
<input type="text" value="Amount__c"/>	<input type="text" value="26000"/>
<div>+ Add Field</div>	

Cancel

Done

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



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

1 Save the flow

* Flow Label: Update Amount Field

* Flow API Name: Update_Amount_Field

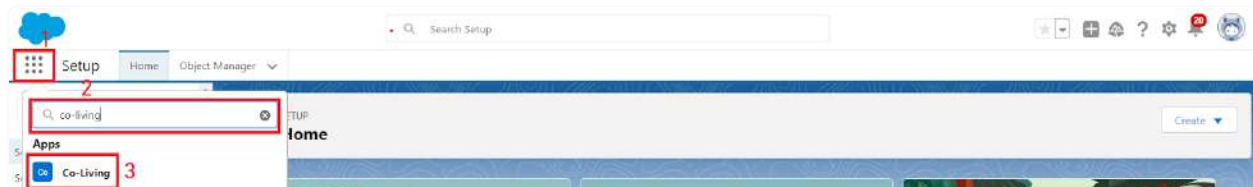
Description:

Show Advanced

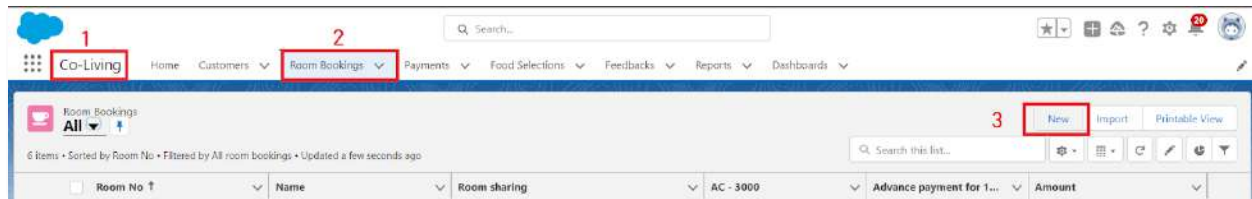
2 Cancel Save

Activity 2 : Test the Flow

1. Go to App Launcher and search for Co-living and select the app



2. In the Co-living app click on the Room sharing tab and click on new.



3. Enter the details like Name, Room sharing, Ac-3000, Advance payment for 1 Month. And the Amount field is empty before saving the record.

New Room Booking

* = Required Information

Information

Room No

*** Name**

Prasad

*** Room sharing**

Double sharing - 12000

AC - 3000

Advance payment for 1month

Amount

Cancel
Save & New
Save

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

Room Booking RN-008

Details

Room No

RN-008

Name

Prasad

Room sharing

Double sharing - 12000

Created By

Veera Venkata Varaprasad Androthu, 19/06/2023, 12:37 pm

AC - 3000

Advance payment for 1month

Amount

₹30,000

Last Modified By

Veera Venkata Varaprasad Androthu, 19/06/2023, 12:37 pm

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

