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## **PROJECT ABSTRACT:**

Our co-living space project is dedicated to building a vibrant and inclusive community where individuals can live, work, and connect with others who share their interests. We believe that a shared living environment promotes collaboration, alleviates feelings of isolation, and improves overall well-being.

The layout of our co-living space will be thoughtfully designed to provide both private areas and communal spaces. Our application will store user profiles, allowing residents to select from various AC rooms with options for multiple sharing arrangements. Users can choose from a daily menu of special food items and make payments using a variety of methods. Additionally, residents will have the opportunity to provide feedback on services such as room cleaning, internet access, and food quality.

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## **TASK 1-SALESFORCE**

### **Introduction**

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 :

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

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

**Sign up for your Salesforce Developer Edition**  
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*  Last Name\*

Email\*

Role\*

Company\*

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 :

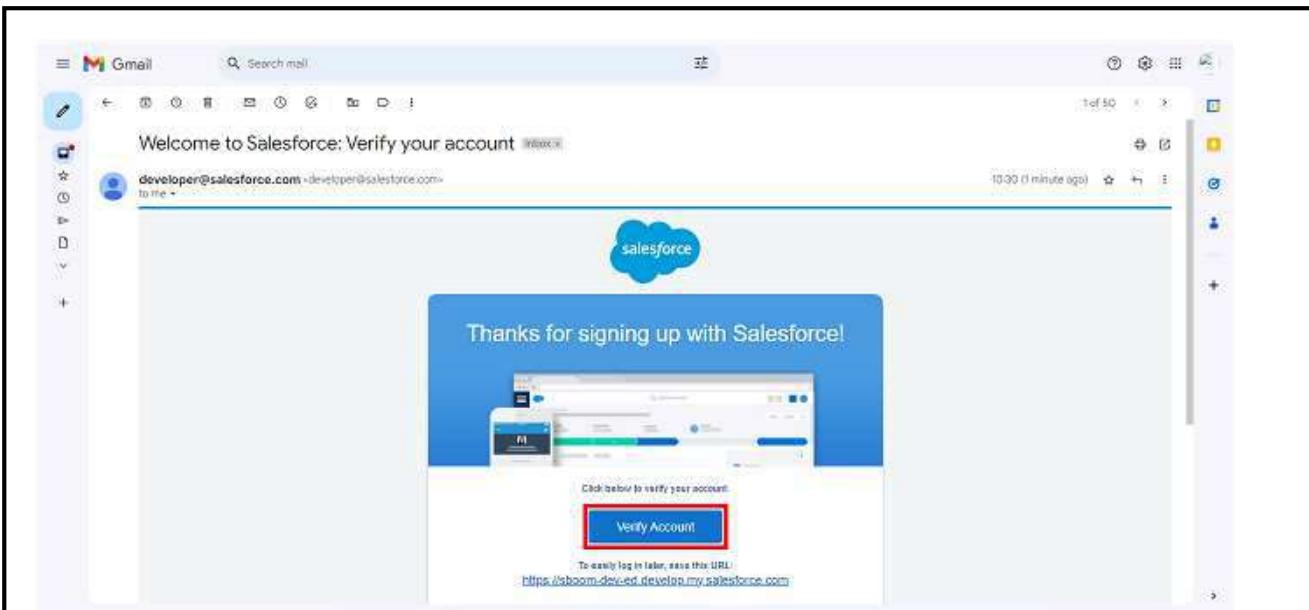
username@organization.com

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.

Change Your Password

Enter a new password for lead@sb.oom.  
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password  
..... Good

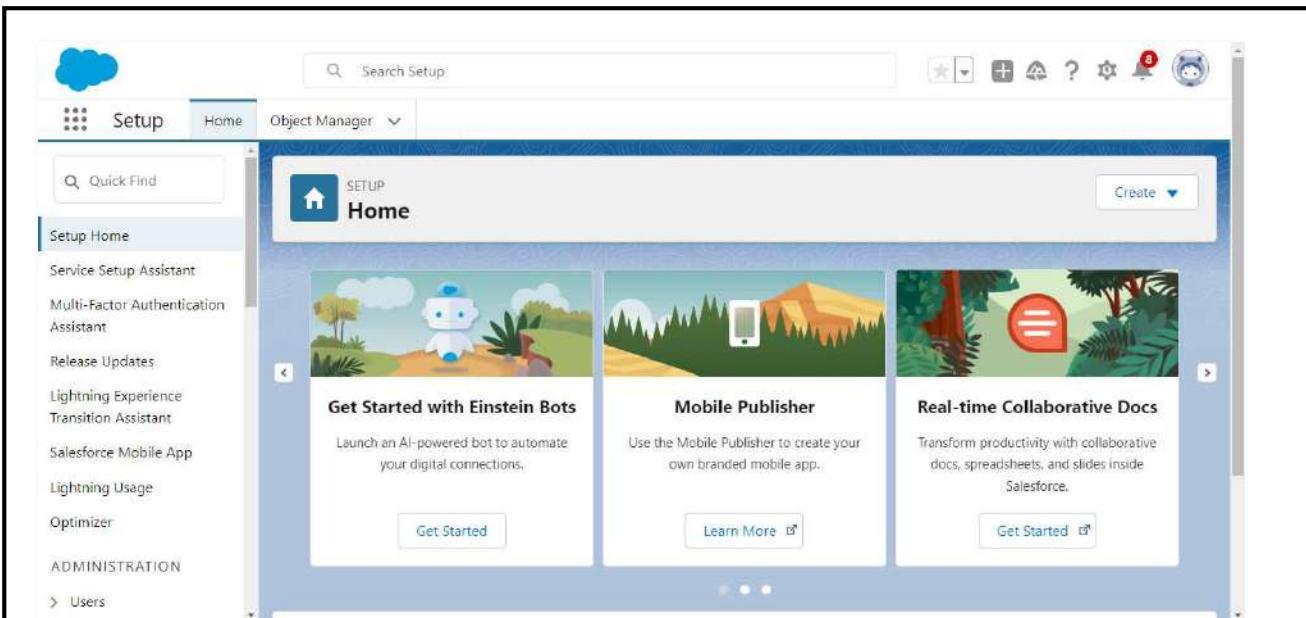
\* Confirm New Password  
..... Match

Security Question  
In what city were you born?

\* Answer  
asdfghijkl

Change Password

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



## **TASK 2-OBJECT**

### **What Is an Object?**

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

**Salesforce objects are of two types:**

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

## **ACTIVITY 1:**

### **Create a custom object for Total Rooms**

To create a custom object, follow these steps:

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

The image consists of three vertically stacked screenshots of the Salesforce Setup interface, illustrating the process of creating a new custom object.

**Screenshot 1: Setup Home**

This screenshot shows the Setup Home page. A red arrow points to the "Setup" button in the top right corner of the header bar.

**Screenshot 2: Object Manager**

This screenshot shows the Object Manager page. A red box highlights the "Object Manager" tab in the top navigation bar. A red arrow points to the "Create" button in the top right corner of the main content area. A red box highlights the "Custom Object" option under the "Create" dropdown menu.

**Screenshot 3: New Custom Object**

This screenshot shows the "New Custom Object" configuration page. Three specific fields are highlighted with red boxes:

- Label:** Total Room (1)
- Object Name:** Total\_Rooms (2)
- Data Type:** Text (3)

**Text Labels for Screenshot 3:**

- Custom Object Definition Edit
- Save | Save & New | Cancel
- Custom Object Information
- The singular and plural labels are used in tabs, menus, and queries.
- Label: Total Room Example: Account
- Plural Label: Total Rooms Example: Accounts
- Starts with vowel sound:
- The Object Name is used when referencing records via API.
- Object Name: Total\_Rooms Example: Account
- Description:
- Content-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, tabs, and reports, and is referenced via the API. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that this Record Name field is always called "Name" when referenced via the API.
- Record Name: Total No Of Rooms Example: Account Name
- Data Type: Text



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**

### **ACTIVITY 1:**

#### **Creating a Tab for Total Rooms**

**To create a Tab:(Total Rooms)**

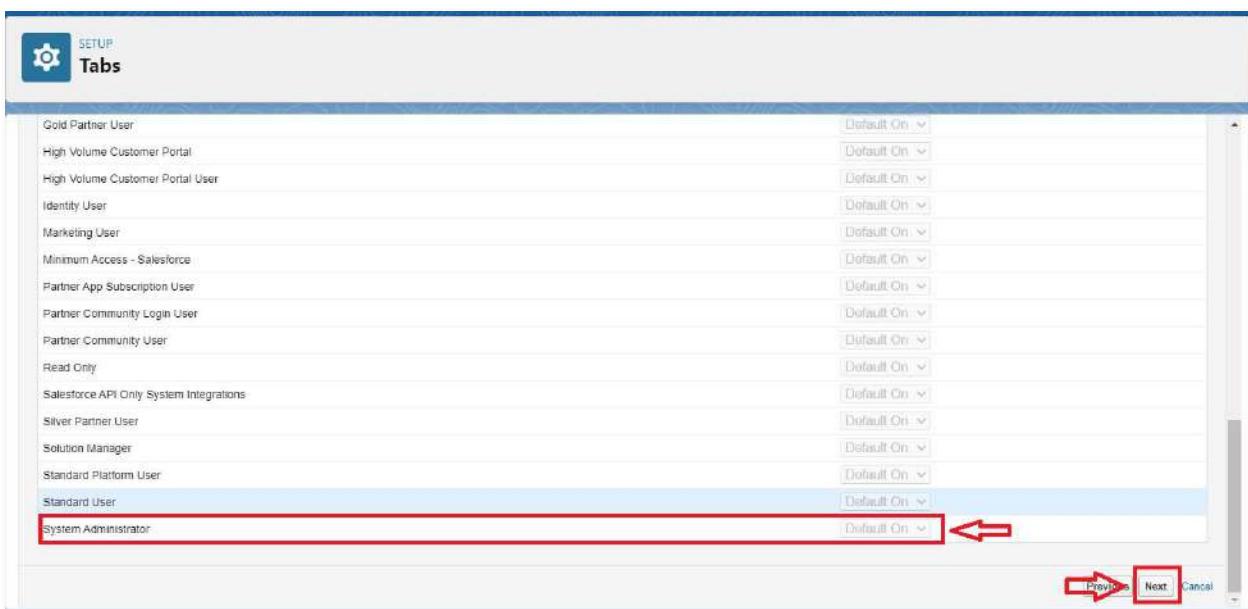
1. Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page selected. The top navigation bar has tabs for 'Setup' and 'Home'. The 'Data' tab is highlighted with a red box and an arrow pointing to it. Below the navigation, there's a search bar and a 'Custom Tabs' section with a 'Create Object Tabs' table. A red box highlights the table, and a red arrow points from it to the 'Total Room' row in the list.

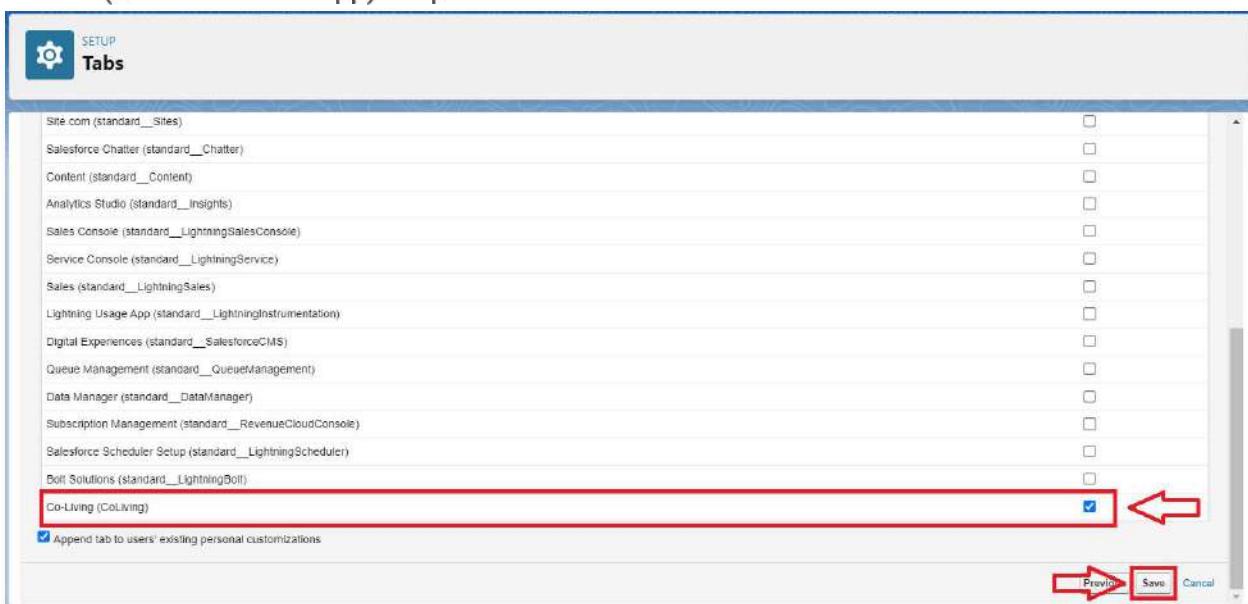
## 2. Select Object(Total Rooms) > Select the tab style.

The screenshot shows the 'New Custom Object Tab' setup screen. Under 'Step 1. Enter the Details', there's a section to choose a custom object. A red arrow points from the 'Object' dropdown to 'Total Room'. Another red box highlights the 'Tab Style' dropdown, which is set to 'Keys'. To the right of the form, a 'Tab Style Selector' window is open, displaying various icons for different tab styles like Airplane, Alarm clock, Apple[1], etc.

## 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.

## **TASK 4-THE LIGHTNING APP**

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

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

### **ACTIVITY 1:**

#### **Create A Lightning App**

To create a lightning app page:

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

**Screenshot of the Lightning Experience App Manager:**

The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar and a navigation bar with tabs like 'Setup', 'Home', and 'Object Manager'. Below the navigation bar, there are two main sections: 'App Manager' and 'Cloud Apps(Beta)'. A red arrow points from the left towards the 'App Manager' section. In the center, there's a large button labeled 'Lightning Experience App Manager' with a blue icon. Another red arrow points from the right towards this button. At the bottom right of the page, there's a prominent red button labeled 'New Lightning App'.

**Task 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.**

**Screenshot of the 'New Lightning App' configuration screen:**

This screenshot shows the 'App Details & Branding' step of the 'New Lightning App' wizard. It has two main sections: 'App Details' and 'App Branding'. In the 'App Details' section, there's a field labeled 'App Name' with the placeholder 'Name your app...' and a red arrow pointing to it. Below it are fields for 'Developer Name' and 'Description'. In the 'App Branding' section, there's a 'Primary Color Hex Value' field set to '#007002' with a color swatch and a red arrow pointing to it. There's also an 'Image' upload field and an 'Org Theme Options' checkbox. At the bottom right of the screen, there's a 'Next' button with a red arrow pointing to it.

**Task 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 4-FIELDS & RELATIONSHIPS**

### **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.

Object Manager

Object Name	Label	Type	Created Date
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object	
Credit Memo	CreditMemo	Standard Object	
Credit Memo Invoice Application	CreditMemoInvoiceApplication	Standard Object	
Credit Memo Line	CreditMemoLine	Standard Object	
Customer	Customer	Standard Object	
<b>Customer1</b>	<b>Customer1_c</b>	<b>Custom Object</b>	12/06/2023
D&B Company	DandBCompany	Standard Object	
Data Use Legal Basis	DataUseLegalBasis	Standard Object	
Data Use Purpose	DataUsePurpose	Standard Object	
Digital Wallet	DigitalWallet	Standard Object	
Duplicate Record Item	DuplicateRecordItem	Standard Object	
Duplicate Record Set	DuplicateRecordSet	Standard Object	
Email Message	EmailMessage	Standard Object	

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

Customer1

Fields & Relationships

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

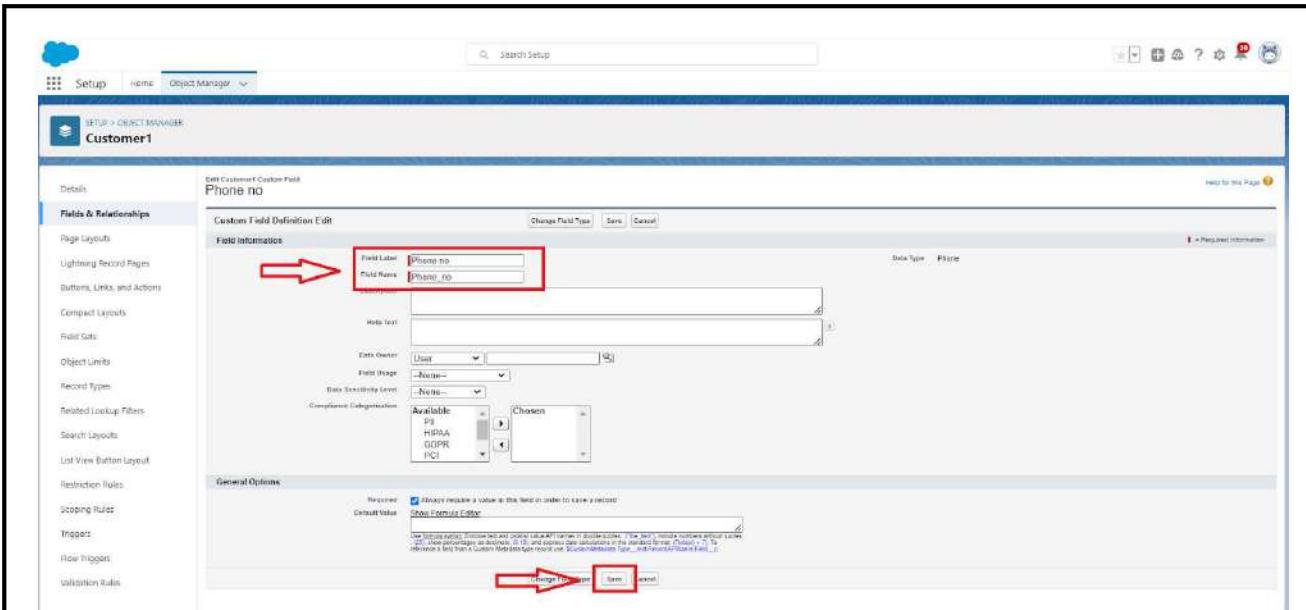
## 3. Select Data Type as a “Phone”

Customer1

Fields & Relationships

DATA TYPE	DESCRIPTION
Currency	Allows users to enter a total or enter currency amounts and automatically formats the field as a currency attribute. This can be useful if you expect data to come in another application.
Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations, includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
<b>Phone</b>	<b>Allows users to enter any phone number. Automatically formats it as a phone number.</b>
Picklist	Allows users to select a value from a list you define.
Picklist (Multi>Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted) (.t)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:59:600" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

## 4. Click on next



**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:**

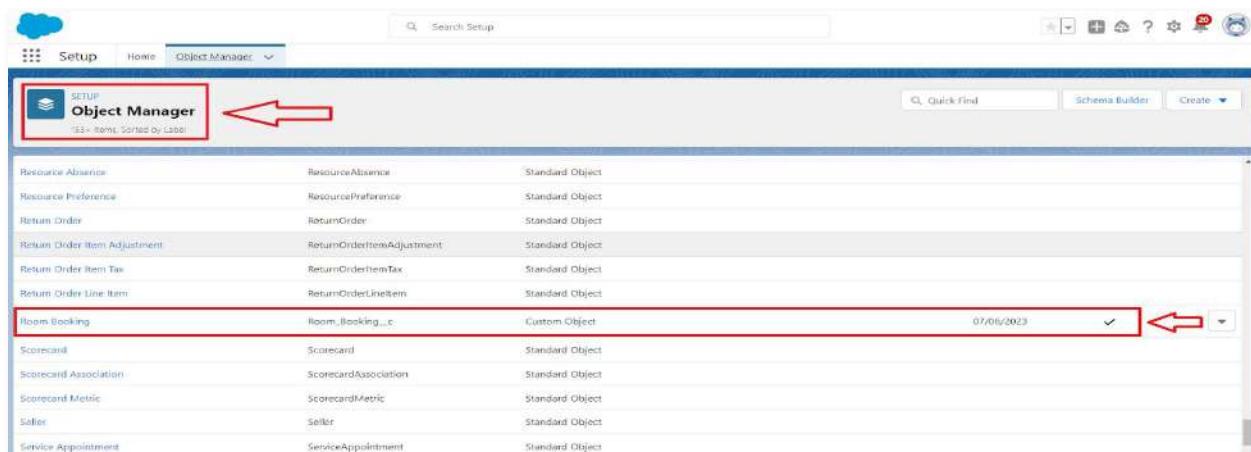
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Picklist” and Click on Next
4. Fill the Above as following:
  - Field Label: Current Status
  - Value - Select enter values 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.



The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'SETUP' and 'Object Manager' selected. Below the navigation bar is a search bar labeled 'Search Setup'. The main area displays a list of objects, with 'Room Booking' highlighted and selected. A red box and arrow point to the 'Object Manager' tab in the navigation bar. Another red box and arrow point to the 'Room Booking' row in the list, specifically to the 'Last Modified' field which shows the date '07/06/2023'.

Object Name	Label	Type	Last Modified
Resource Absence	ResourceAbsence	Standard Object	
Resource Preference	ResourcePreference	Standard Object	
Return Order	ReturnOrder	Standard Object	
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object	
Return Order Item Tax	ReturnOrderItemTax	Standard Object	
Return Order Line Item	ReturnOrderLineItem	Standard Object	
<b>Room Booking</b>	<b>Room_Booking...c</b>	<b>Custom Object</b>	<b>07/06/2023</b>
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

**Room Booking**

**Fields & Relationships**

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

### 3. Select Data Type as a "Picklist"

**Room Booking**

**Fields & Relationships**

- Checkbox
- 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

**Picklist**

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

### 4. Click on Next

SETUP > OBJECT MANAGER  
Room Booking

Step 2. Enter the details

Field Label: Room Sharing (1)

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

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

Field Name: Room\_Sharing (4)

Description:

Help Text:

Default Value: Room Formula Field

5. Fill the Above as following:

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

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

To create fields & relationship to an object:

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

Object	Name	Type	Created Date
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

Setup > OBJECT MANAGER  
Room Booking

**Fields & Relationships**

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

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

4. Click on Next

Setup > OBJECT MANAGER  
Room Booking

**Fields & Relationships**

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

**Data Type**

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

**Master-Detail Relationship**

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

The relationship field is required on all detail records.

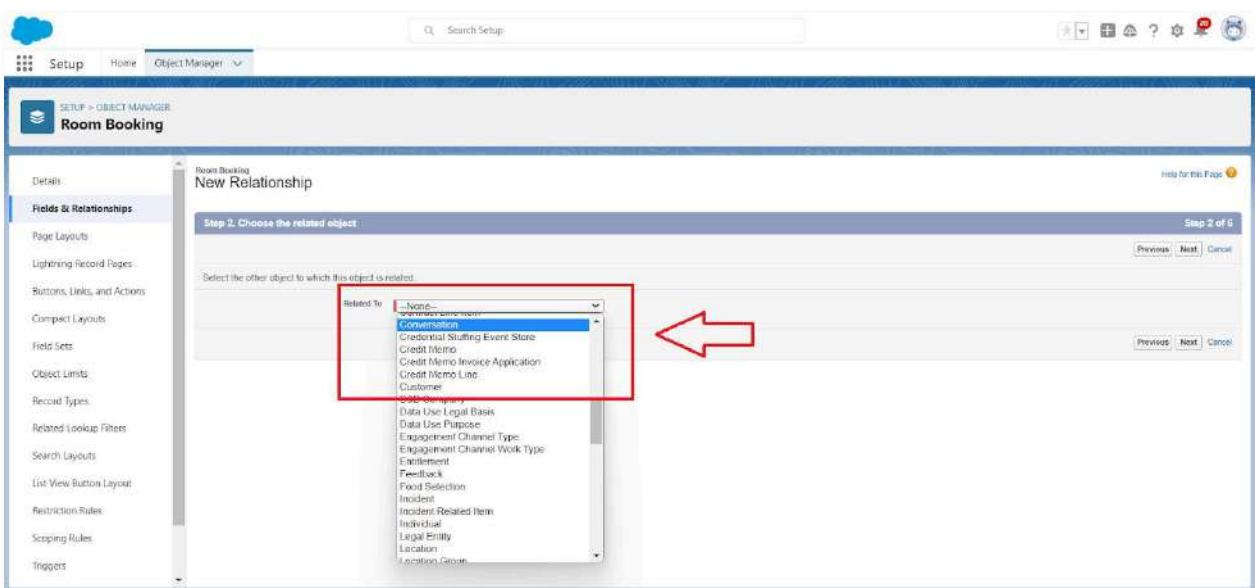
- The relationship field is required on all detail records.
- The master object and its detail objects are referenced by the master record.
- When a user edits the master object, all detail records are deleted.
- You can create roll-up summary fields on the master record to summarize the detail records.

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

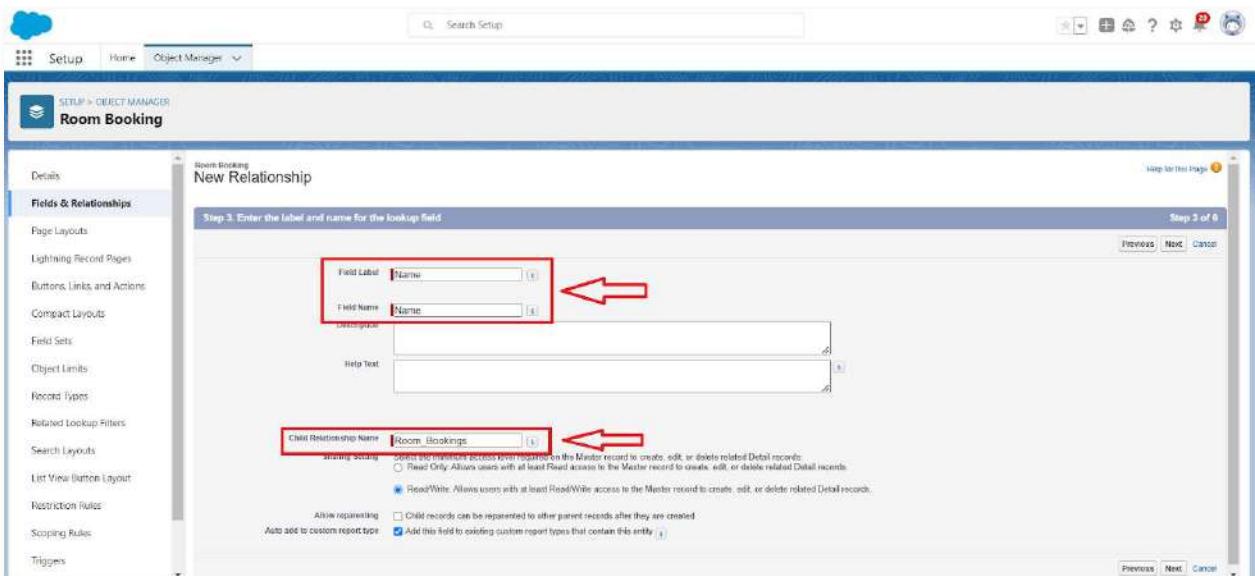
**External Lookup Relationship**

- Checkbox
- Currency
- Date
- Date/Time
- Email

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 5

Previous Next Cancel

Select Object to Summarize

Master Object: Total Room  
Summarized Object: Room Bookings

Select Roll-Up Type

COUNT       SUM  
 MIN       MAX

Field to Aggregate: None

Filter Criteria

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

Previous Next Cancel

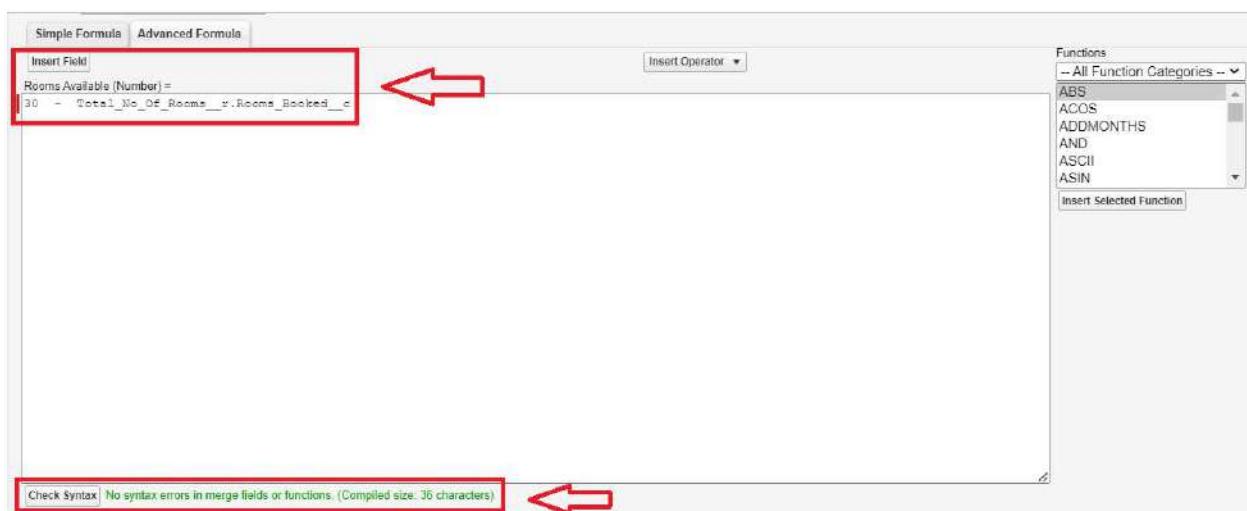
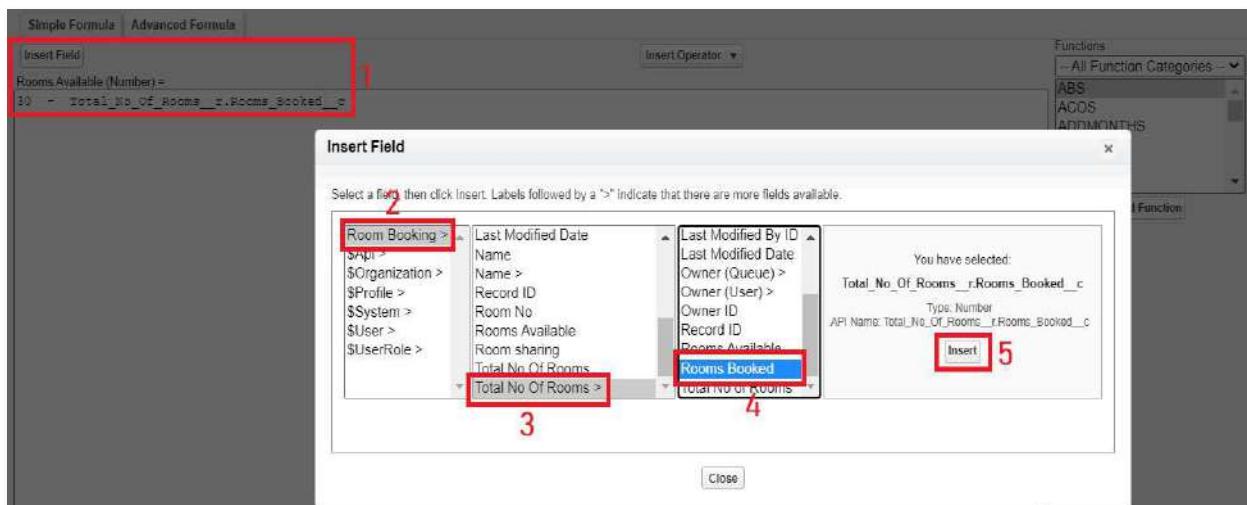
7. Click on Next > Next > Save and new

## 8. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Rooms Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Formula” and Click on Next

4. Fill the Above as following:

- Field Label: Rooms Available
- Field Name : It's gets auto generated
- Select the Formula Return Type as "Number"
- Select the Decimal places as "0" and Click on Next
- Click on the Advanced Formula and Enter the value in formula box " 30 - " and Click on insert field than you will find a pop window under the Room Booking select the Total No Of Rooms in the second Column and select the Room Booked in the third column and click on insert " 30 - Total\_No\_of\_Rooms\_\_r.Rooms\_Booked\_\_c " and Check Syntax



- Click on Next > Next > Save and new.

## 9. To create fields in an object:

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

- bar > click on the object.
2. Now click on “Fields & Relationships” > New
  3. Select Data Type as a “Checkbox”
  4. Click on Next
  5. Fill the Above as following:
    - Field Label: Check in
    - Field Name :It's gets auto generated
    - Click on Next > Next > Save and new

#### **10. To create fields in an object:**

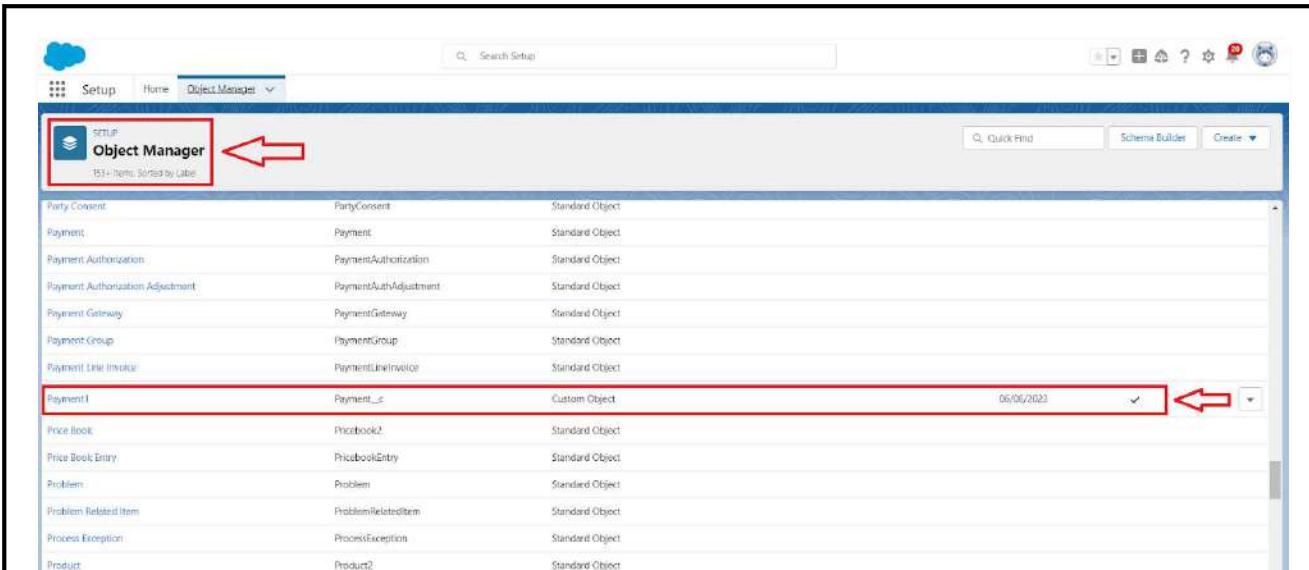
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
  - Field Label: Check Out
  - Field Name :It's gets auto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

### **ACTIVITY 3:**

#### **Creation of Fields & Relationship for Payment1 Object**

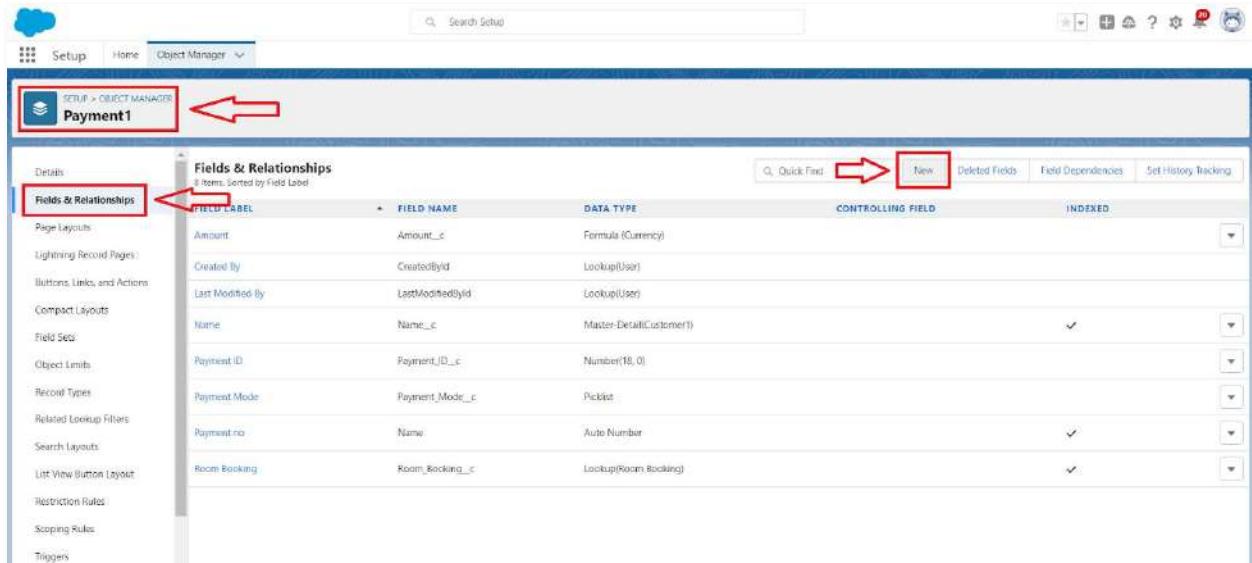
##### **1. To create fields & relationship to an object:**

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



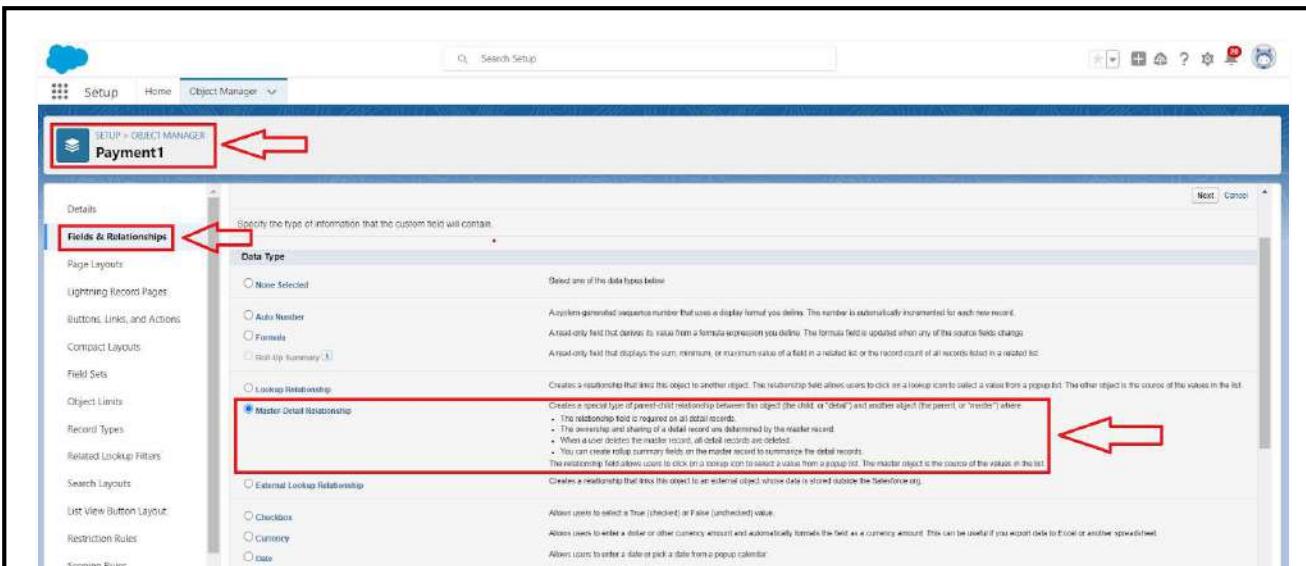
Party Consent	PartyConsent	Standard Object
Payment	Payment	Standard Object
Payment Authorization	PaymentAuthorization	Standard Object
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object
Payment Gateway	PaymentGateway	Standard Object
Payment Group	PaymentGroup	Standard Object
Payment Line Invoice	PaymentLineInvoice	Standard Object
<b>Payment1</b>	<b>Payment__c</b>	<b>Custom Object</b>
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



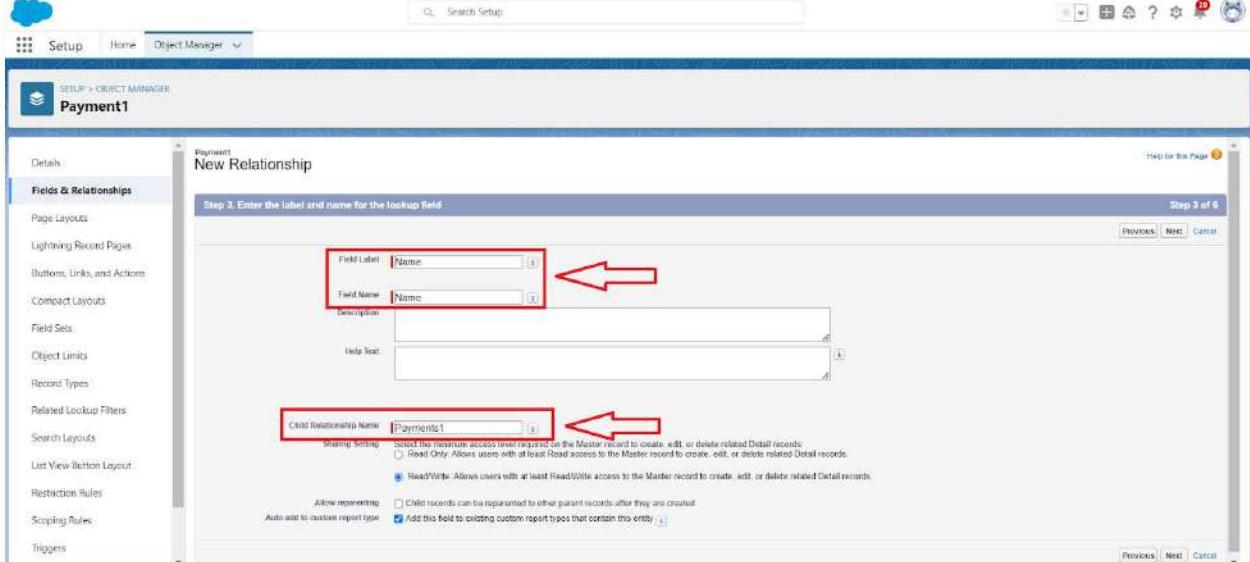
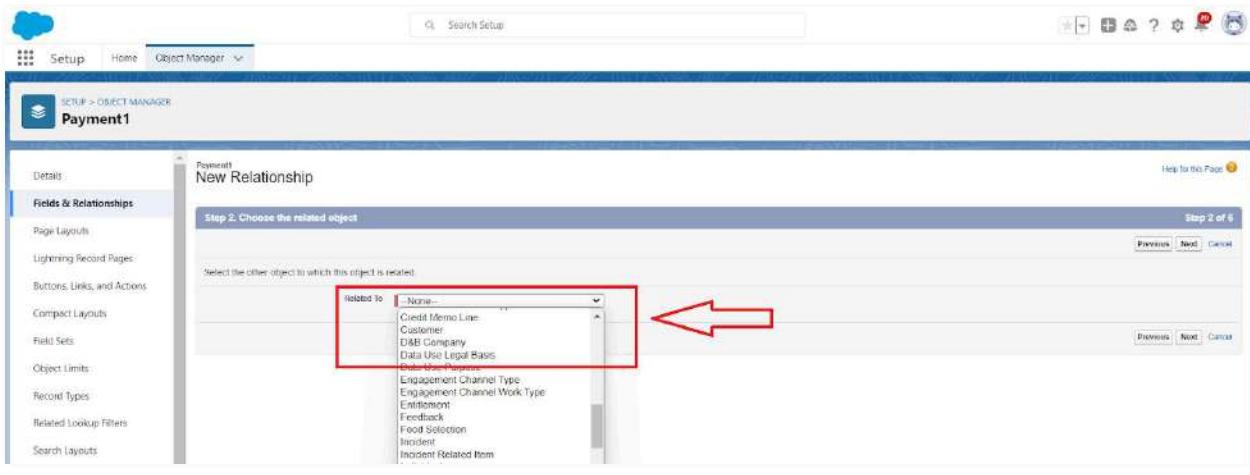
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name__c	Master-Detail(Customer)		
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment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

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



4. Click on Next

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



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

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

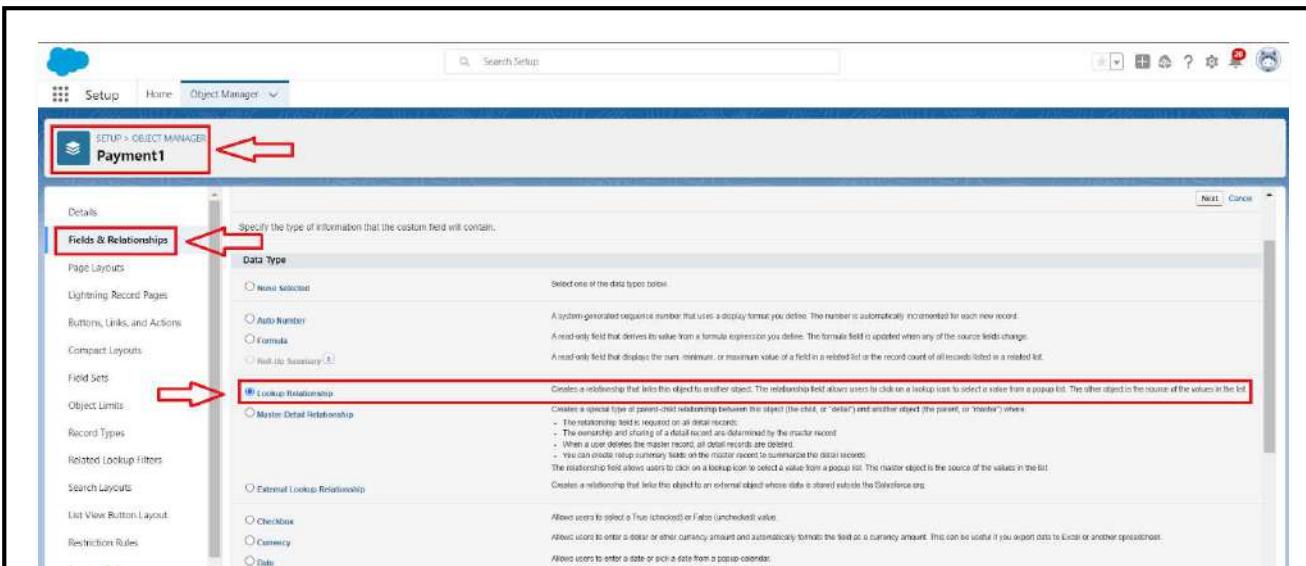
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.

Object	Name	Type	Created Date
Party Consent	PartyConsent	Standard Object	
Payment	Payment	Standard Object	
Payment Authorization	PaymentAuthorization	Standard Object	
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object	
Payment Gateway	PaymentGateway	Standard Object	
Payment Group	PaymentGroup	Standard Object	
Payment Line Invoice	PaymentLineInvoice	Standard Object	
<b>Payment1</b>	<b>Payment__c</b>	<b>Custom Object</b>	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	

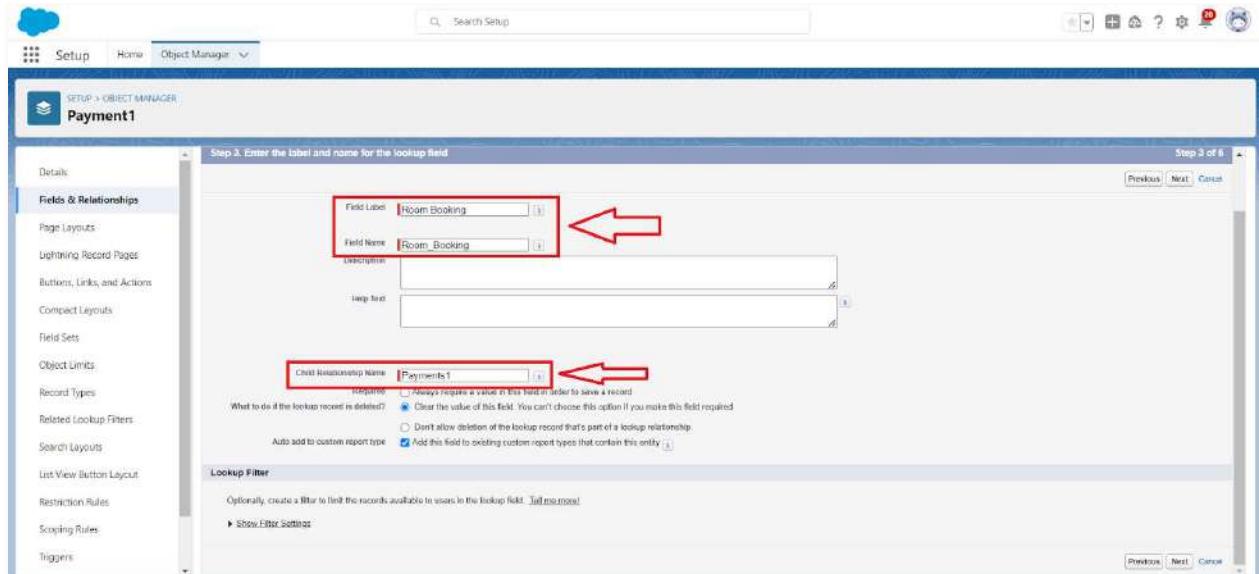
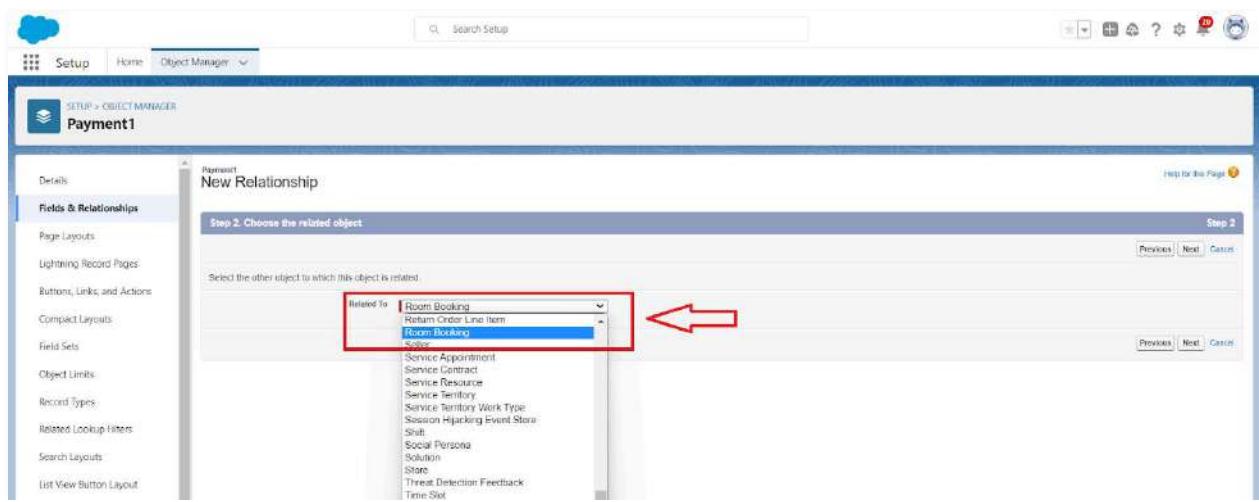
2. Now click on "Fields & Relationships" > New

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

3. Select Data Type as a "Lookup Relationship"
4. Click on Next



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



6. Fill the Above as following:

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

### 3. Creation of another fields for the Payment1 object

To create fields in an object:

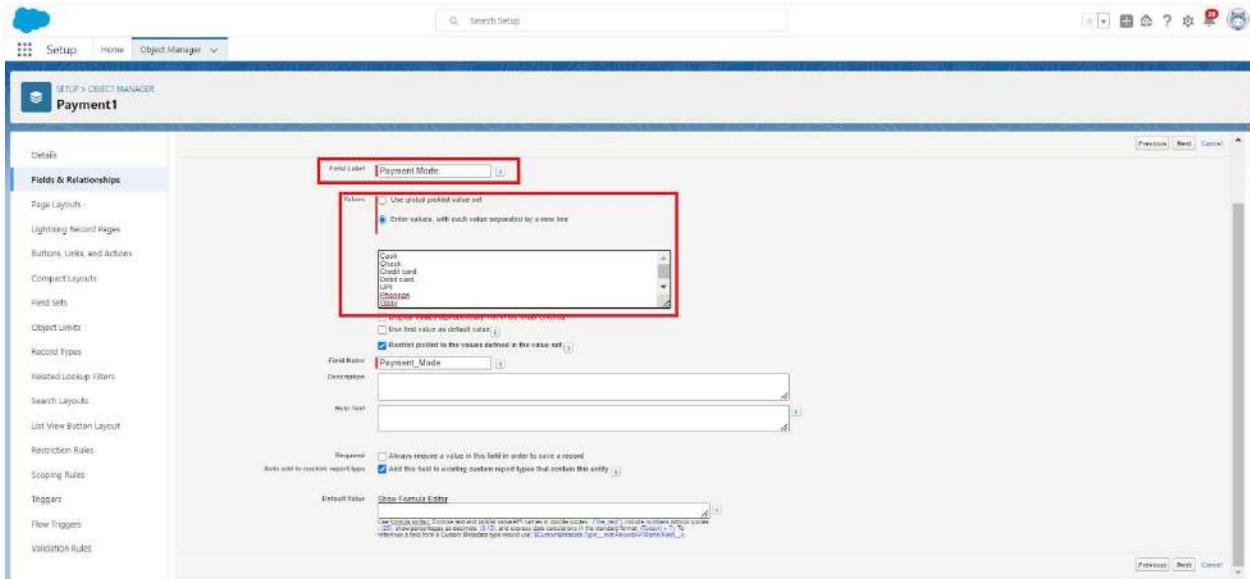
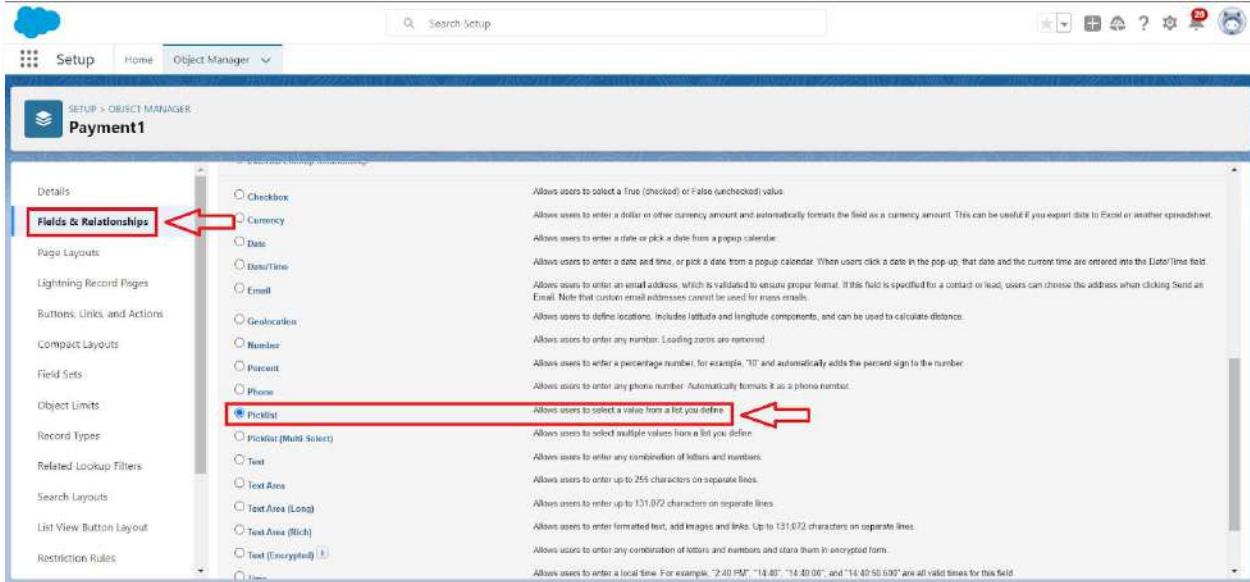
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The search bar at the top right contains 'Search Setup'. Below the header, there is a toolbar with various icons. The main area is titled 'Object Manager' and displays a list of objects. A red box highlights the 'Payment' row, which has a value 'Payment\_c' in the 'FIELD NAME' column and 'Custom Object' in the 'DATA TYPE' column. To the right of the 'FIELD NAME' column, there is a dropdown menu with a red arrow pointing to it. The list also includes other standard and custom objects like PaymentAuthorization, PaymentAuthorizationAdjustment, PaymentGateway, PaymentGroup, PaymentLineInvoice, PriceBook, PriceBookEntry, Problem, ProblemRelatedItem, ProcessException, and Product.

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

The screenshot shows the 'Fields & Relationships' page for the 'Payment1' object. At the top left, there is a breadcrumb path 'SETUP > OBJECT MANAGER' followed by 'Payment1', with a red arrow pointing to the 'Payment1' part. The top right features a 'New' button highlighted with a red box. The main area is a table titled 'Fields & Relationships' with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists several fields: 'Amount' (FIELD NAME: Amount\_c, DATA TYPE: Formula (Currency)), 'Created By' (FIELD NAME: CreatedBy, DATA TYPE: Lookup([User])), 'Last Modified By' (FIELD NAME: LastModifiedBy, DATA TYPE: Lookup([User])), 'Name' (FIELD NAME: Name\_c, DATA TYPE: Master-Detail([Customer])), 'Payment ID' (FIELD NAME: PaymentID\_c, DATA TYPE: Number(18, 0)), 'Payment Mode' (FIELD NAME: PaymentMode\_c, DATA TYPE: Picklist), 'Payment no' (FIELD NAME: Name, DATA TYPE: Auto Number), and 'Room Booking' (FIELD NAME: RoomBooking\_c, DATA TYPE: Lookup([Room Booking])). The 'Fields & Relationships' tab in the sidebar is also highlighted with a red box.

### 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:

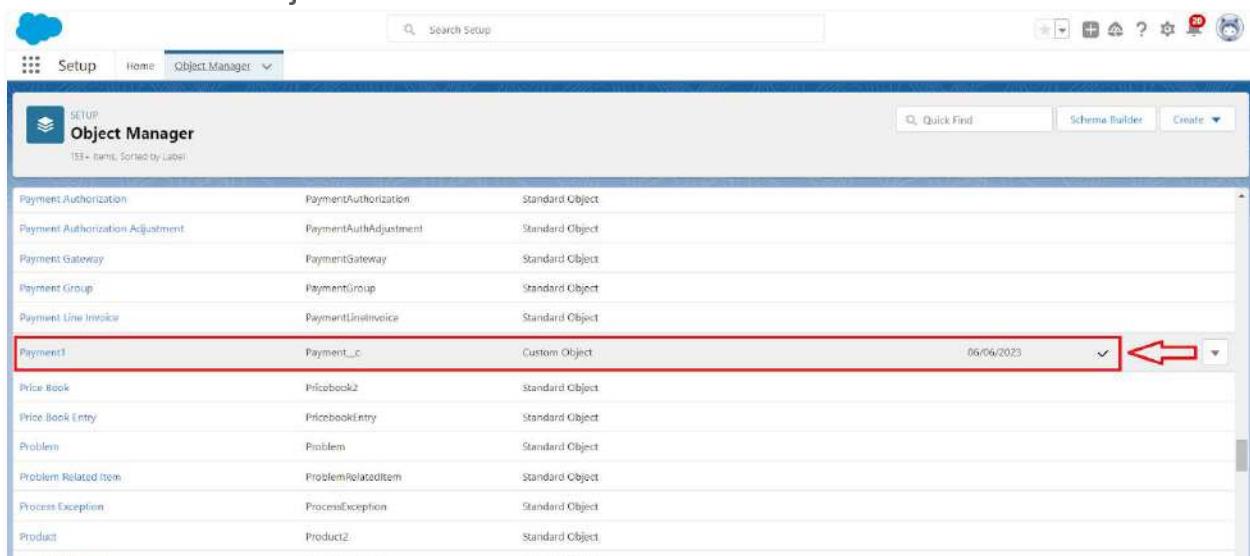
In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

### 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.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'SETUP', 'Home', 'Object Manager', 'Search Setup', 'Quick Find', 'Schema Builder', and 'Create'. The main area is titled 'Object Manager' with a sub-header '182+ items. Sorted by Label'. A red box highlights the row for 'Payment1', which is listed as 'Payment\_\_c' with a 'Custom Object' status. To the right of this row is a dropdown menu with a red arrow pointing to it. Below this row, there is a list of other standard and custom objects: Price Book, Price Book Entry, Problem, Problem Related Item, Process Exception, and Product.

Object Name	Object Label	Type
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
<b>Payment1</b>	<b>Payment__c</b>	<b>Custom Object</b>
Price Book	Pricebook2	Standard Object
Price Book Entry	PricebookEntry	Standard Object
Problem	Problem	Standard Object
Problem Related Item	ProblemRelatedItem	Standard Object
Process Exception	ProcessException	Standard Object
Product	Product2	Standard Object

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

Setup > Object Manager  
Payment1

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	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 "Formula"
4. Click on Next

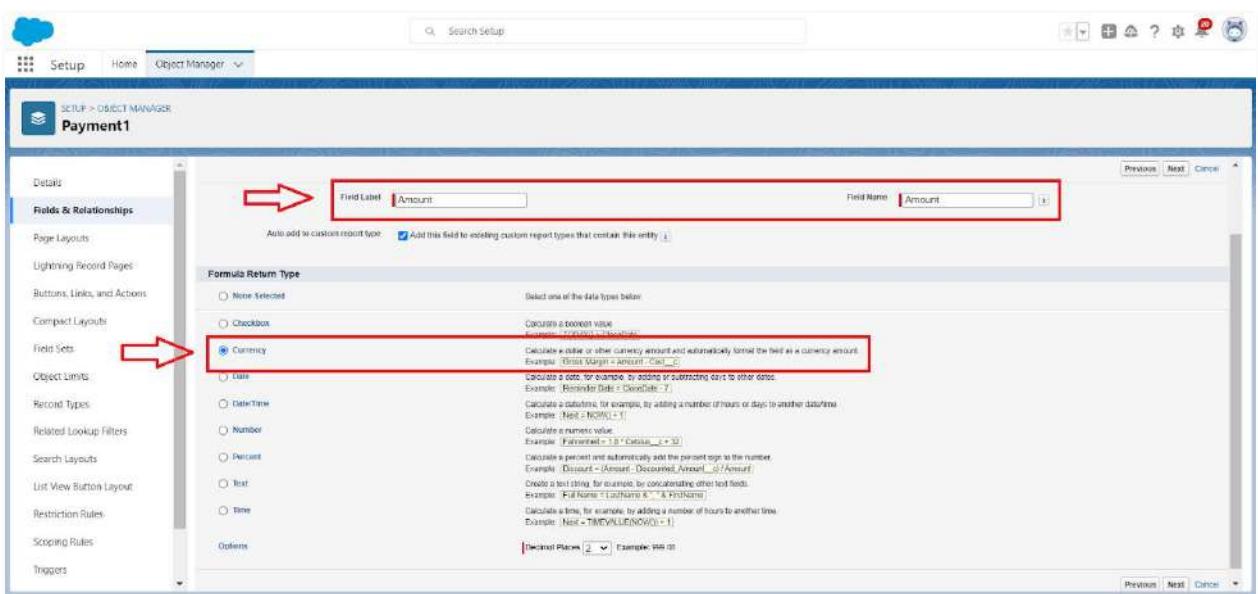
Setup > Object Manager  
Payment1

**Fields & Relationships**

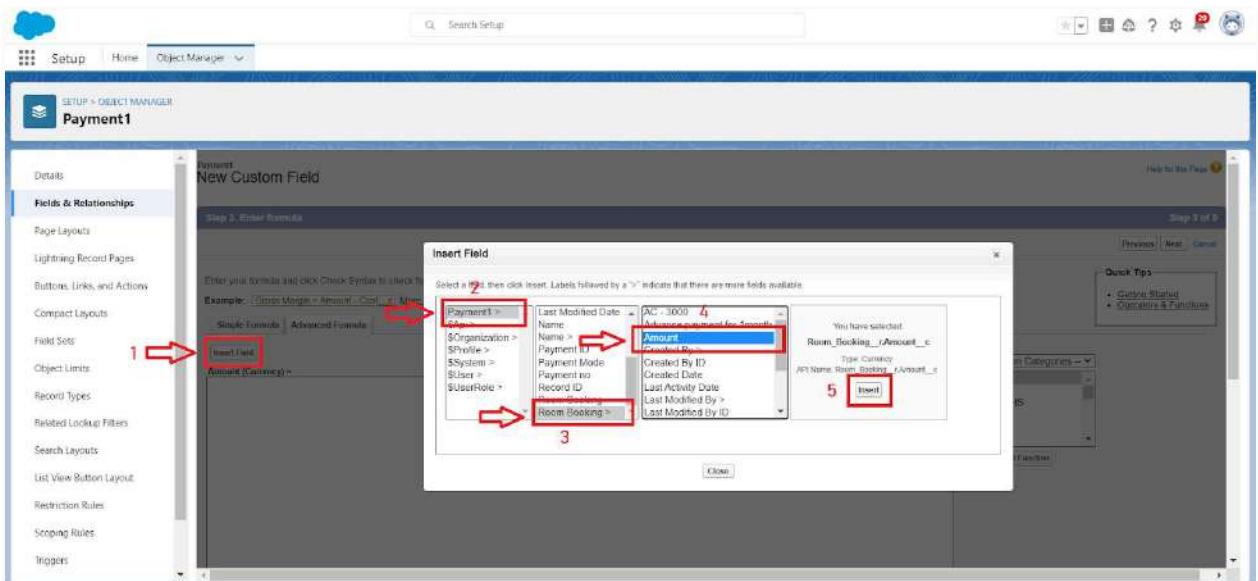
Select one of the data types below.

<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system generated sequential number that uses a display format you define. The number is automatically incremented for each new record.
<input checked="" type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records selected in a master list.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a lookup list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship	Creates a special type of master-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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

#### 1. To create fields & relationship to an object:

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

Entitlement Contact	EntitlementContact	Standard Object
Event	Event	Standard Object
Feedback	Feedback_c	Custom Object
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object
Finance Transaction	FinanceTransaction	Standard Object
Food Selection	Food_Selection_c	Custom Object
Image	Image	Standard Object
Incident	Incident	Standard Object
Incident Related Item	IncidentRelatedItem	Standard Object
Individual	Individual	Standard Object
Invoice	Invoice	Standard Object
Invoice Line	InvoiceLine	Standard Object
Lead	Lead	Standard Object

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

**Food Selection**

**Fields & Relationships**

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

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

### 4. Click on Next

**Food Selection**

**Data Type**

Select one of the data types below.

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

**Master-Detail Relationship**

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

This relationship creates a special type of parent-child relationship between this object (the child, or “detail”) and another object (the parent, or “master”) where:

- The master record is the parent record.
- The ownership and sharing of detail records are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

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

**External Lookup Relationship**

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

**Related to**

- Customer1
- Account
- Contact
- Lead
- Opportunity
- Product2
- Quota
- Task
- WorkOrder

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

The image consists of two screenshots of the Salesforce Object Manager interface.

**Screenshot 1: Step 3. Enter the label and name for the lookup field**

- Field Label:** Name (highlighted with a red box and a red arrow pointing to it)
- Field Name:** Name (highlighted with a red box and a red arrow pointing to it)
- Child Relationship Name:** Food\_Selections (highlighted with a red box and a red arrow pointing to it)
- Sharing Setting:** ReadWrite (selected radio button)
- Allow Reparenting:** Child records can be reparented to other parent records after they are created (unchecked checkbox)
- Auto add to custom report type:** Add this field to existing custom report types that contain this entry (checked checkbox)

**Screenshot 2: Step 2. Choose the related object**

Select the other object to which this object is related to:  
**Related To:** Customer (highlighted with a red box and a red arrow pointing to it)

#### 6. Fill the Above as following:

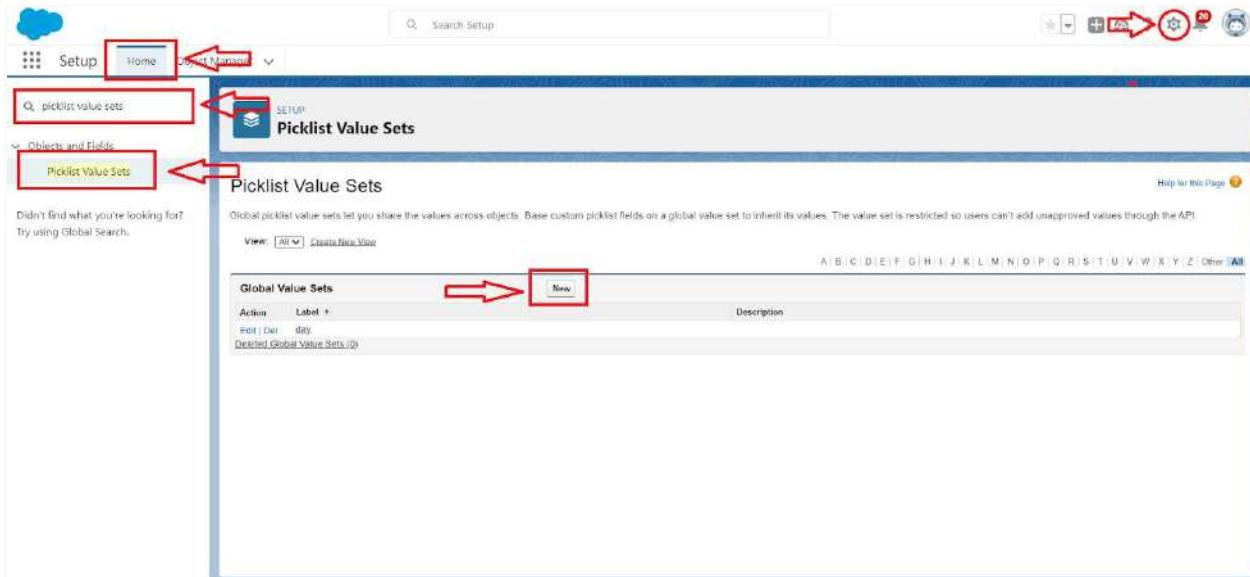
- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

#### Picklist value sets:

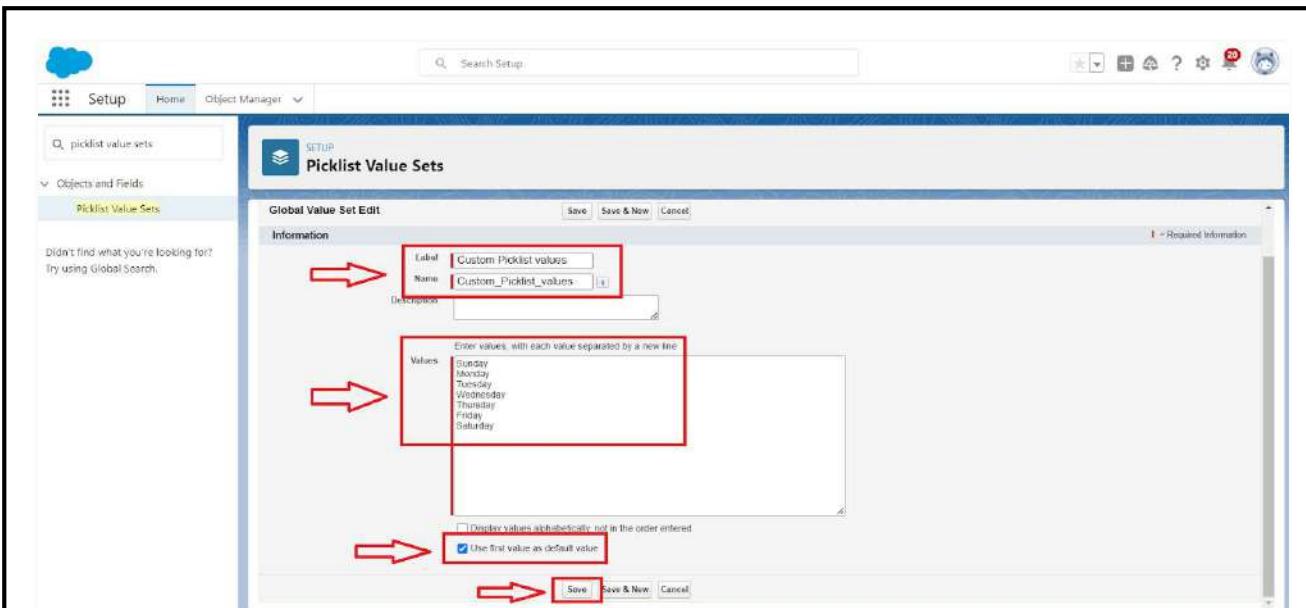
Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

### Create a picklist value set:

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



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



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

## 2. Create a picklist Field for Food selection object

To create fields in an object:

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

Entitlement Contact	EntitlementContact	Standard Object
Event	Event	Standard Object
Feedback	Feedback_c	Custom Object
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object
Finance Transaction	FinanceTransaction	Standard Object
Food Selection	Food_Selection_c	Custom Object
Image	Image	Standard Object
Incident	Incident	Standard Object
Incident Related Item	IncidentRelatedItem	Standard Object
Individual	Individual	Standard Object
Invoice	Invoice	Standard Object
Invoice Line	InvoiceLine	Standard Object
Lead	Lead	Standard Object

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

**Food Selection**

**Fields & Relationships**

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

### 3. Select Data Type as a “Picklist”

**Food Selection**

**Fields & Relationships**

- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) (1)
- Time
- URL

**4. Fill the Above as following:**

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

### 3. Create a another picklist Field for Food selection object

To create fields in an object :

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

3.

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Food Selection' row in the list below, which is also circled in red. A red arrow points from the 'Food Selection' label to the circled row.

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
<b>Food Selection</b>	<b>Food_Selection__c</b>	<b>Custom Object</b>
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

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

4.

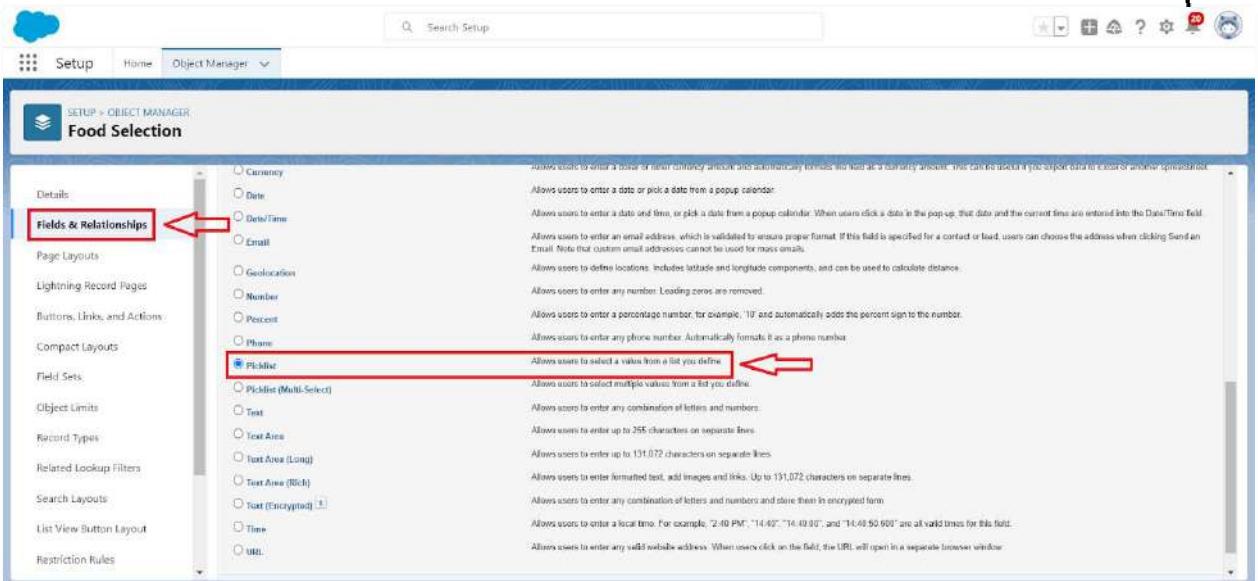
The screenshot shows the 'Fields & Relationships' page for the 'Food Selection' object. A red box highlights the 'Food Selection' label in the top left. Another red box highlights the 'Fields & Relationships' tab in the left sidebar. A red arrow points from the 'Fields & Relationships' tab to the circled 'New' button in the top right toolbar.

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Breakfast	Breakfast_c	Picklist		
Lightning Record Pages	Created By	CreatedBy	Lookup(User)		
Buttons, Links, and Actions	Dinner	Dinner_c	Picklist		
Compact Layouts	Food Selection No	Name	Auto Number		
Field Sets	Last Modified By	LastModifiedBy	Lookup(User)		
Object Limits	Lunch	Lunch_c	Picklist		
Record Types	Name	Name_c	Master-Detail(Customer)		
Related Lookup Filters	Select breakfast	Select_Breakfast_c	Picklist	breakfast	
Search Layouts	Select dinner	Select_dinner_c	Picklist	Dinner	
List View Button Layout					
Restriction Rules					

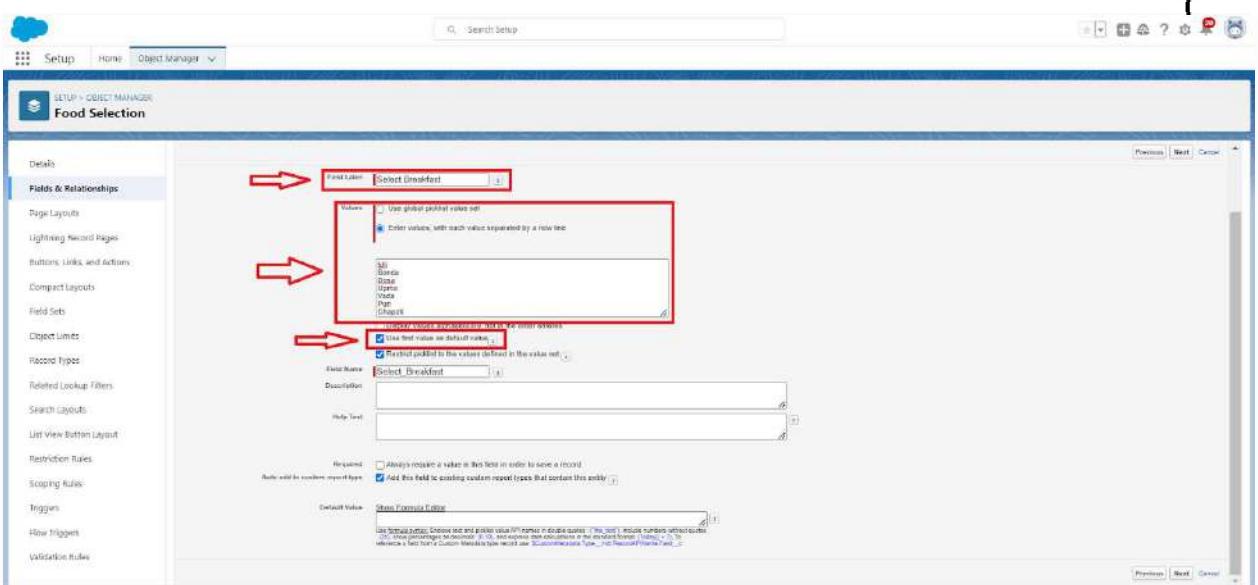
5.

a. Select Data Type as a "Picklist"

6.



7.



8.

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

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

9.

### **Field Dependency:**

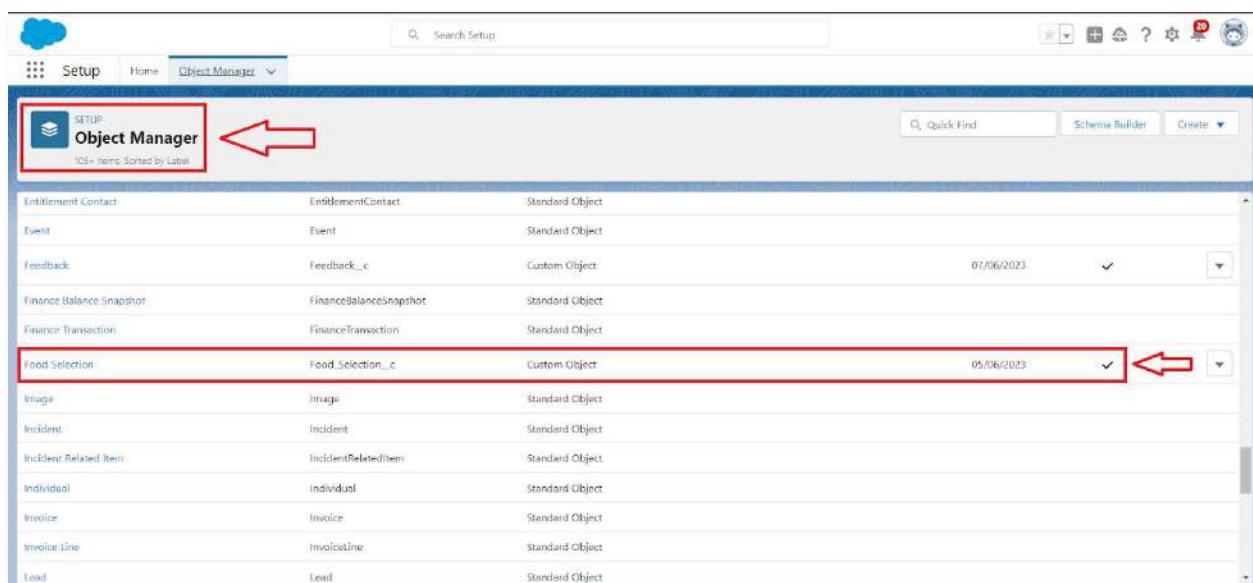
A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by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



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'SETUP' and 'Object Manager'. Below it is a search bar labeled 'Search Setup'. The main area displays a list of objects, each with its name, API name, and object type. The 'Food Selection' object is highlighted with a red box and a red arrow pointing to it from the left. Another red box highlights the date '05/06/2023' in the last column of the 'Food Selection' row, with a red arrow pointing to it from the right.

Object	API Name	Type	Date
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	
<b>Food Selection</b>	<b>Food_Selection__c</b>	<b>Custom Object</b>	<b>05/06/2023</b>
Image	Image	Standard Object	
Incident	Incident	Standard Object	
Incident Related Item	IncidentRelatedItem	Standard Object	
Individual	Individual	Standard Object	
Invoice	Invoice	Standard Object	
Invoice Line	InvoiceLine	Standard Object	
Lead	Lead	Standard Object	

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

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

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	

### 3. Now Click on New Option

SETUP > OBJECT MANAGER  
Food Selection

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

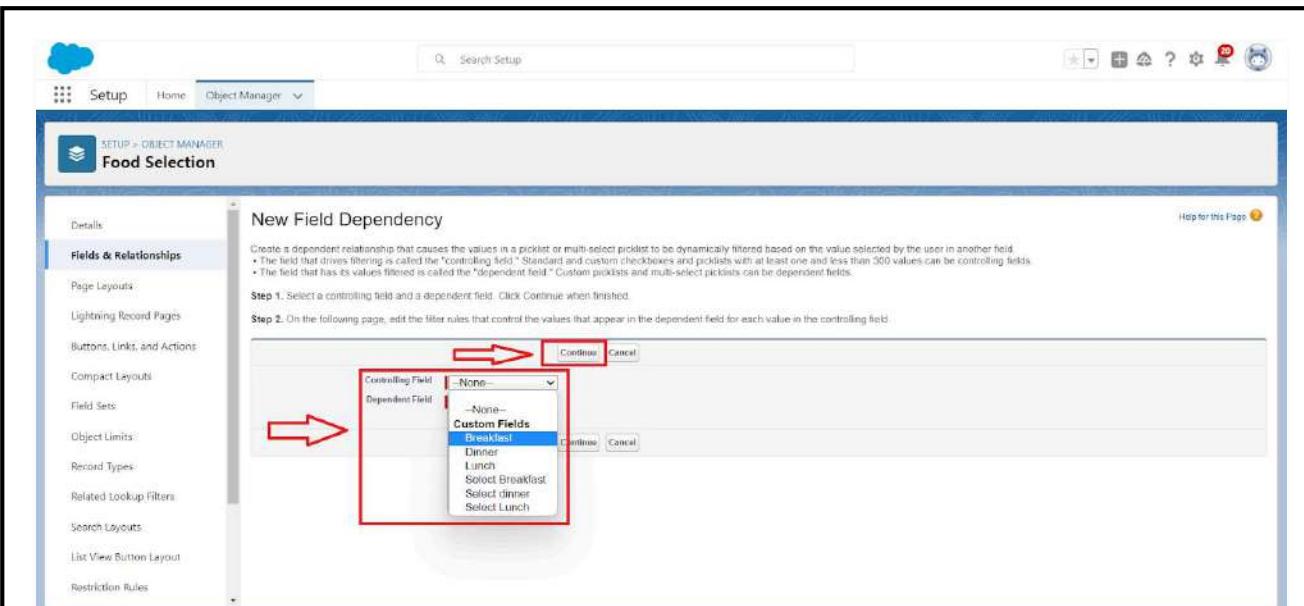
Record Types

Food Selection Field Dependencies

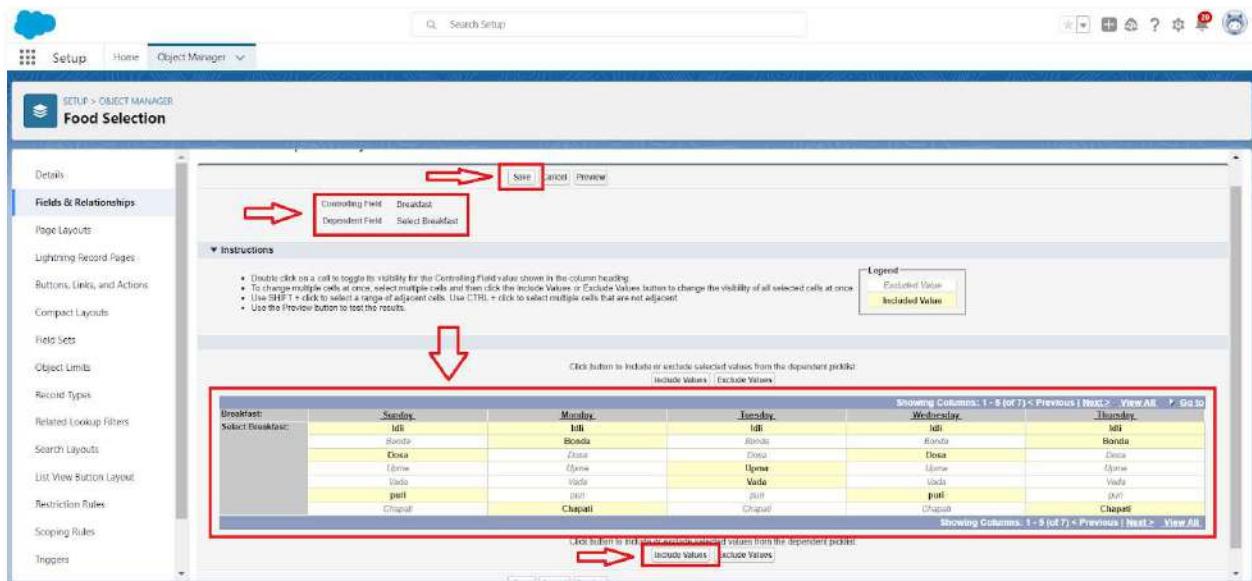
This page allows you to define dependencies between fields (e.g., dependent picklists).

Action	Controlling Field	Dependent Field	Modified By
Edit   Del	Breakfast	Select Breakfast	Veera Venkata Varaprasad Andottil, 07/06/2023, 3:45 pm
Edit   Del	Dinner	Select dinner	Veera Venkata Varaprasad Andottil, 07/06/2023, 3:55 pm
Edit   Del	Lunch	Select Lunch	Veera Venkata Varaprasad Andottil, 07/06/2023, 3:56 pm

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



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



#### 4. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar ? click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
  - Field Label: Lunch
  - Under Value - Select the Use global picklist value set

- Under the drop down select the Custom Picklist Values
- Select required
- Click on Next > Next > Save and new.

##### **5. To create fields in an object:**

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
  2. Now click on “Fields & Relationships” > New
  3. Select Data Type as a “Picklist”
  4. Fill the Above as following:
    - Field Label: Select Lunch
    - Under Value - Enter values, with each value separated by a new line
  1. Meals
  2. Chicken biryani
  3. Veg biryani
  4. Veg fried rice
  5. Egg fried rice
  6. Chicken fried rice
  7. Curd rice
  8. Tomato rice
  9. Egg noodles
  10. Chicken Noodles
  11. Bhagara rice
- Select Checkbox Use First value as default Value
  - Click on Next > Next > Save and new.

##### **To create a Field dependencies for Lunch and Select Lunch.**

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

## 6. To create fields in an object:

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

## 7. To create fields in an object:

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

3. Veg biryani
4. Veg fried rice
5. Egg fried rice
6. Chicken fried rice
7. Curd rice
8. Tomato rice
9. Egg noodles
10. Chicken Noodles
11. Bhagara rice
12. Select Checkbox Use First value as default Value
13. 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.

The screenshot shows the 'Edit Field Dependency' screen for the 'Food Selection' object. The 'Controlling Field' is set to 'Lunch' and the 'Dependent Field' is set to 'Select Lunch'. The 'Instructions' section provides guidance on using the grid to manage field visibility. The main grid lists lunch items for each day of the week. Red boxes highlight specific elements: the 'Lunch' column header, the 'Select Lunch' dependent field, the 'Include Value' button for Sunday, and the 'Exclude Value' button for Saturday.

#### 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

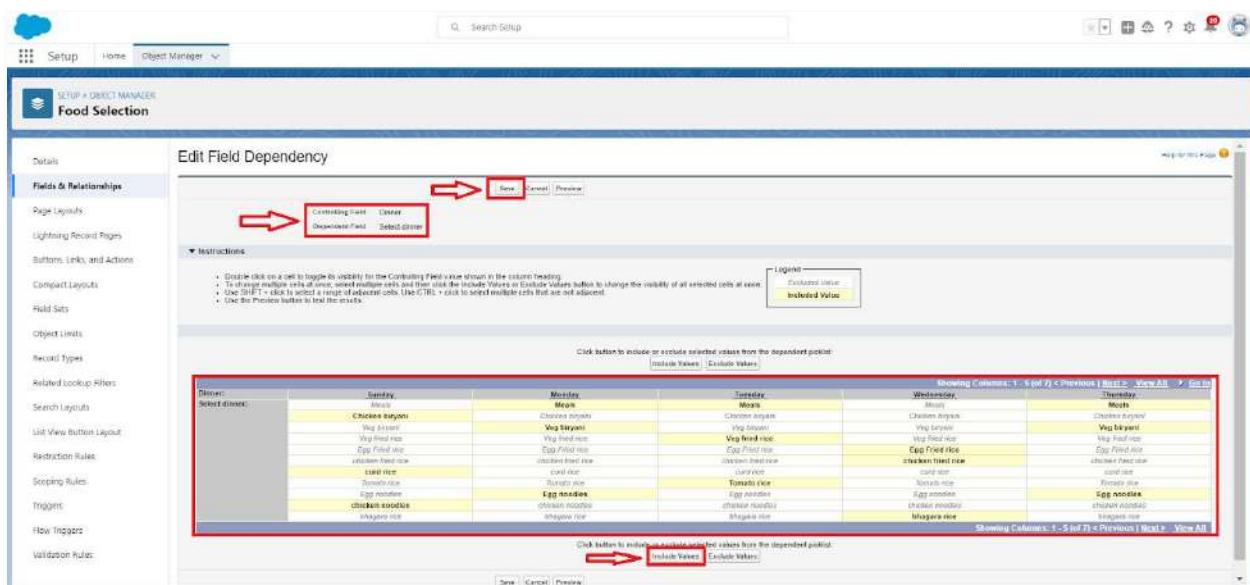
search bar > click on the object.

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.



## **ACTIVITY 5:**

## **Creation of fields for the Feedback object**

## 1. create fields & relationship to an object:

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

The screenshot shows the Salesforce Object Manager interface. A red arrow points to the 'Object Manager' tab in the top navigation bar. Another red arrow points to the 'Feedback' row in the list, which is highlighted with a red border. The URL in the browser address bar is <https://thesmarthub-208-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01s90000032Gz2/FieldsAndRelationships/view>.

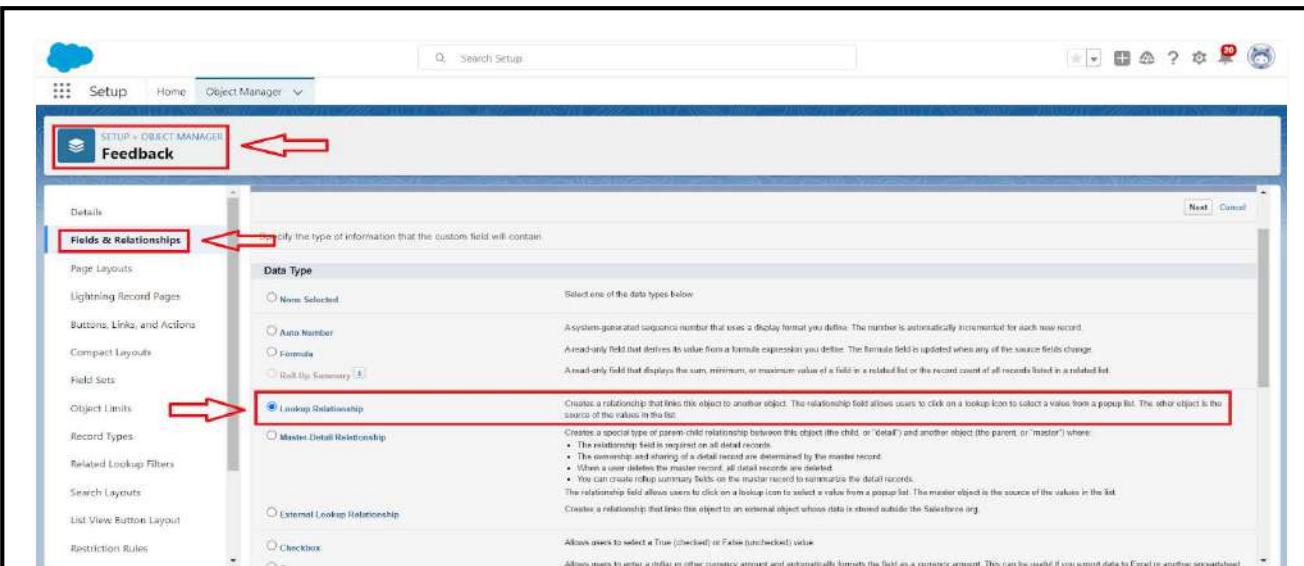
2. Now click on “Fields & Relationships” > New

The screenshot shows the 'Fields & Relationships' page for the 'Feedback' object. A red arrow points to the 'Fields & Relationships' tab in the left sidebar. Another red arrow points to the 'New' button at the top right of the table header. The table lists various fields with their labels, names, data types, controlling fields, and indexing status. The 'FIELD LABEL' column includes: Created By, Feedback No, Food, Housecleaning, Internet, Last Modified By, Name, Owner, and Suggestion.

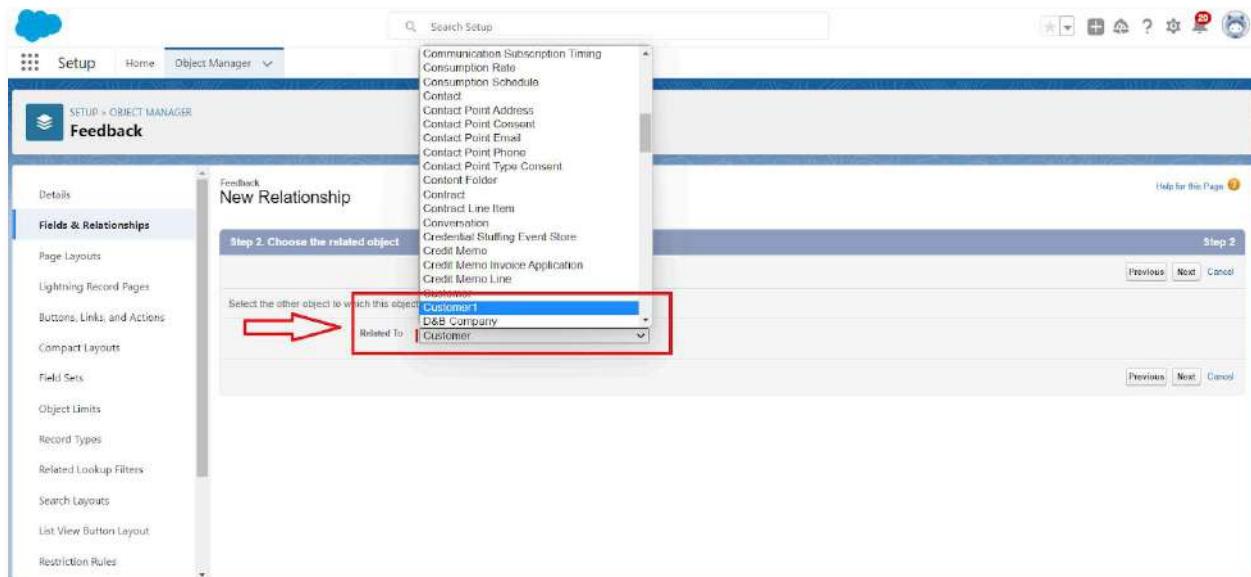
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback No	Name	Auto Number		✓
Food	Food_c	Picklist		
Housecleaning	Housecleaning_c	Picklist		
Internet	Internet_c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Lookup(Customer)		✓
Owner	OwnerId	Lookup(User Group)		✓
Suggestion	Suggestion_c	Text Area(255)		

3. Select Data Type as a “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.

Step 3 of 6

Field Label: Name  
Field Name: Name

Child Relationship Name: Feedbacks1

What do you want to do if the lookup record is deleted?  
 Always retain a valid reference even if it's deleted.  
 Clear the value of this field. You can't choose this option if you make this field required.  
 Don't allow deletion of the lookup record that's part of a lookup relationship.

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

Lookup Filter: Optionally, create a filter to limit the records available to users in the lookup field. Tell me more.

## 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.

Object	Description	Type	Last Modified By
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	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	

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

**SETUP > OBJECT MANAGER**

**Feedback**

**Fields & Relationships**

Details

Fields & Relationships

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

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

### 3. Select Data Type as a “Picklist”

**SETUP > OBJECT MANAGER**

**Feedback**

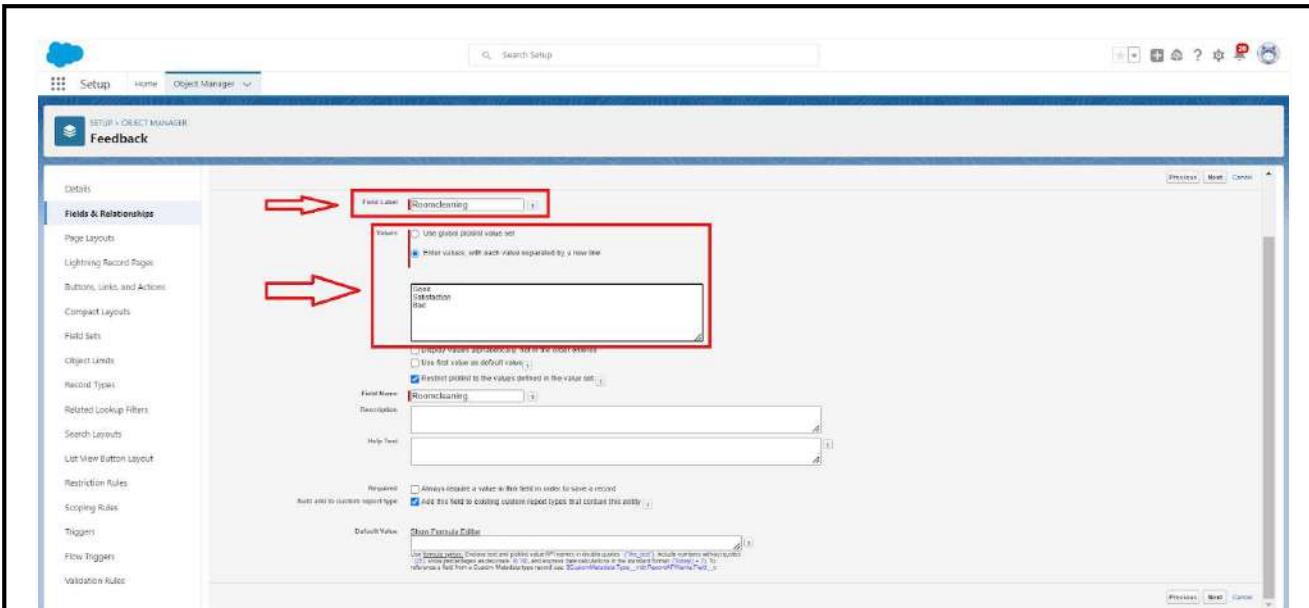
**Fields & Relationships**

Details

Fields & Relationships

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

### 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.

Object	Name	Type	Last Modified Date
Shift Work Topic	ShiftWorkTopic	Standard Object	
Skill Requirement	SkillRequirement	Standard Object	
Social Persona	SocialPersona	Standard Object	
Store	WebStore	Standard Object	
Task	Task	Standard Object	
Time Slot	TimeSlot	Standard Object	
<b>Total Room</b>	<b>Total_Rooms__c</b>	<b>Custom Object</b>	<b>27/06/2023</b>
User	User	Standard Object	
User Provisioning Request	UserProvisioningRequest	Standard Object	
Voice Call	VoiceCall	Standard Object	
Waitlist	Waitlist	Standard Object	
Waitlist Participant	WaitlistParticipant	Standard Object	

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

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

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

Step 1. Choose the field type

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

Data Type

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

Help for this Page

Step 1

Next Step Cancel

## 4. Fill the Above as following:

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

SETUP > OBJECT MANAGER  
Total Room

**Fields & Relationships**

Field Label: **Rooms Available** 4

Field Name: **Rooms\_Available**

Auto add to custom report type  Add this field to existing custom report types that contain this entity 5

**Formula Return Type**

- More Selected
- Checkbox
- Currency
- Date
- DateTime
- Number 5
- Percent
- Text
- Time
- Options

Select one of the data types below:

Calculate a boolean value.  
Example: [TOTALAVAIL - CloseDate]

Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: [Gross Margin - Amount - Curr\_\_c]

Calculate a date, for example, by adding or subtracting days to other dates.  
Example: [Enddate - 1day - CloseDate - 7]

Calculate a datetime, for example, by adding a number of hours or days to another datetime.  
Example: [Startdate + 1hr \* Calculate\_\_c + 3d]

Calculate a numeric value.  
Example: [RateAmount + 1.0 \* Calculate\_\_c + 30]

Calculate a percent and automatically add the percent sign to the number.  
Example: [Discount - 100 \* Discounted\_Amount\_\_c / Amount]

Create a text string, for example, by concatenating other text fields.  
Example: [Full Name = LastName & ", " & FirstName]

Calculate a time, for example, by adding a number of hours to another time.  
Example: [Next - TIMEVALUE(HOUR(Now)) + 1]

Decimal Places: **0** Example: 0.00 6

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

Simple Formula | Advanced Formula 7

Insert Field | Insert Operator | Functions

Rooms Available (Number) =  
30 - Rooms\_Booked\_c

Check Syntax | No syntax errors in merge fields or functions. (Compiled size: 36 characters) 8

-- All Function Categories --

ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

Insert Selected Function

#### 10. Click on Next > Next > Save and next

## TASK 6-VALIDATION RULE

### 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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A red box highlights the 'Room Booking' object in the list, and a red arrow points to it from the left. Another red arrow points to the dropdown menu at the top right of the list.

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

The screenshot shows the 'Validation Rules' page for the 'Room Booking' object. A red box highlights the 'Validation Rules' section at the top, and a red arrow points to it from the left. Another red arrow points to the 'New' button on the right side of the table.

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)

The screenshot shows the 'Validation Rule Edit' page for the 'checkbox\_field' rule. A red box highlights the 'Rule Name' field containing 'checkbox\_field', and a red arrow points to it from the left. Another red arrow points to the 'Advanced' dropdown menu in the formula editor. A third red arrow points to the 'Error Message' field containing 'Checkbox should be checked', and a fourth red arrow points to the 'Error Location' dropdown menu at the bottom.

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 'Validation Rule' configuration page. The 'Rule Name' is 'check\_in\_rule' (1). The 'Active' checkbox is checked (2). In the 'Error Condition Formula' section, the formula 'Check\_in\_\_c = False' is entered (2). In the 'Error Message' section, the message 'Check box should be checked' is entered (3). Under 'Error Location', the 'Field' radio button is selected (4).

7. Click on save.

## TASK 7-Profile:

### 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)

Setup Home Object Manager

Search Setup

Users Profiles

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

**Profiles**

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Salesforce API Only System Integrator	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input checked="" type="checkbox"/> Edit   Clone	Standard User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	<input type="checkbox"/>

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Help for this Page

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

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile Standard User

User License Salesforce

Profile Name

Save Cancel

I = Required Information

Help for this Page

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

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

	Read	Create	Edit	Delete	View All	Modify All
Payments	<input checked="" type="checkbox"/>					
Room Bookings	<input checked="" type="checkbox"/>					
Total Rooms	<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
- Obfuscate secret answer for password resets:
- Require a minimum 1 day password lifetime:

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 shows the 'Edit Profile' page in Salesforce. At the top, there are two sections of 'Custom Object Permissions' tables. The first table has rows for 'Customers', 'Feedbacks', and 'Food Selections'. The second table has rows for 'Payments', 'Room Bookings', and 'Total Rooms'. Both tables have columns for 'Basic Access' (Read, Create, Edit, Delete, View All, Modify All) and 'Data Administration'. Red arrows point from the text above to the 'Read' column for each row in both tables, indicating that only the 'Read' permission should be checked. Below these tables are 'Session Settings' and 'Password Policies' sections.

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.

The screenshot shows the 'Basic Access' section of the Salesforce Setup. It displays two tabs of access rights for different objects:

- Left Tab (Customers):**

	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"/>
- Right Tab (Payments):**

	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** and **Password Policies** sections are also visible at the bottom.

5. Scroll down and Click on Save.

## TASK 8-ROLES

### ACTIVITY 1:Marketing Role

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

The screenshot shows the 'Setup' interface with the 'Roles' page selected. The sidebar on the left shows various categories like 'Users', 'Sales', 'Service', etc., with 'Roles' highlighted. The main content area displays a hierarchical view of roles:

```

graph TD
    CEO[CEO President] --> WesternSalesDir[Western Sales Director]
    CEO --> EasternSalesDir[Eastern Sales Director]
    CEO --> InternationalSalesDir[International Sales Director]
    WesternSalesDir --> WesternRep1[Western Sales Rep]
    WesternSalesDir --> WesternRep2[Western Sales Rep]
    EasternSalesDir --> EasternRep1[NY Sales Rep]
    EasternSalesDir --> EasternRep2[MA Sales Rep]
    InternationalSalesDir --> InternationalRep1[Asian Sales Rep]
    InternationalSalesDir --> InternationalRep2[European Sales Rep]
  
```

Each role has associated permissions listed to its right. At the bottom right of the page, there is a 'Set Up Roles' button with a red arrow pointing to it.

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

#### Your Organization's Role Hierarchy



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

The screenshot shows the 'Role Edit' screen for a new role. The 'Label' field contains 'Marketing' and the 'Role Name' field also contains 'Marketing'. A red arrow points from the 'Label' field to the 'Role Name' field, indicating they are linked. Another red arrow points to the 'Save' button at the bottom right of the form.

4. Then click on Save.

## ACTIVITY 2: Receptionist Role

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

The screenshot shows the 'Role Edit' screen for a new role. The 'Label' field contains 'Receptionist' and the 'Role Name' field also contains 'Receptionist'. A red arrow points from the 'Label' field to the 'Role Name' field, indicating they are linked. Another red arrow points to the 'Save' button at the bottom right of the form.

4. Then click on Save.

## TASK 9-Users

### ACTIVITY 1:Create User

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

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with various setup categories like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. Under 'User Management Settings', the 'Users' link is highlighted with a red arrow. The main area is titled 'All Users' and contains a table of existing users. At the top of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A red arrow points to the 'New User' button. The table lists users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Some profiles have checkmarks next to them.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Varsha Vanka Venkateswaran	Varsha	varsha.vanka@textandnbsp;@textandnbsp;.com	<input checked="" type="checkbox"/> System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Chatter Faced	Chatter	chatty_005@0000000000000000@chatter.salesforce.com	<input checked="" type="checkbox"/> Chatter Faced User	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	User Integration	integ	integration@0000000000000000@salesforce.com	<input checked="" type="checkbox"/> Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	User_Security	sec	usersecurity@0000000000000000@salesforce.com	<input checked="" type="checkbox"/> Analytics Cloud Security User	<input checked="" type="checkbox"/>	

2. Fill in the fields

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

The screenshot shows the 'User Edit' page in Salesforce. The 'General Information' section on the left contains fields for First Name, Last Name, Alias, Email, Username, and Nickname, all of which are highlighted with a red box. A red arrow points from this section to the 'Required Information' sidebar on the right. The sidebar includes fields for Role (set to 'CEO'), User License (set to 'Salesforce'), Profile (set to 'Custom user'), and Active status (checked). Other optional fields like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), and Ultra Contrast Database are also shown.

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

User Edit  
abhilash garapati

User Edit

General Information

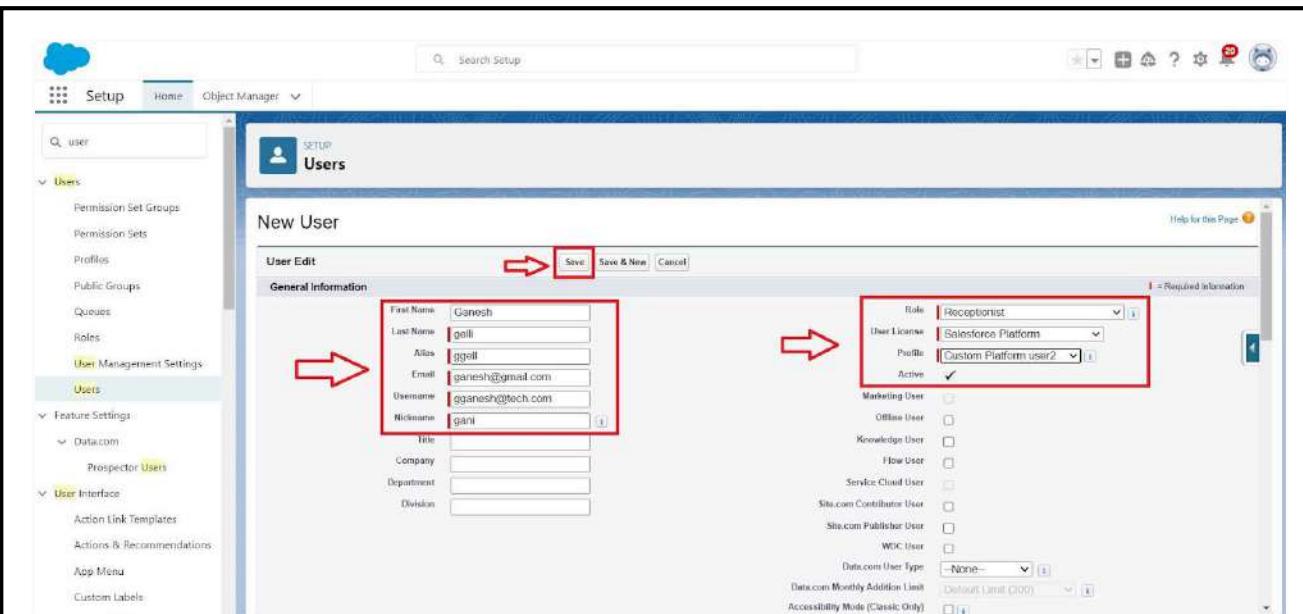
First Name: abhilash  
Last Name: garapati  
Alias: agara  
Email: abhi@gmail.com  
Username: abhi@tech.com  
Nickname: abhi

Role: Marketing  
User License: Salesforce Platform  
Profile: Customer Platform user1  
Active:

3. save

### ACTIVITY 3:Create Another User

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



3. Save

## 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

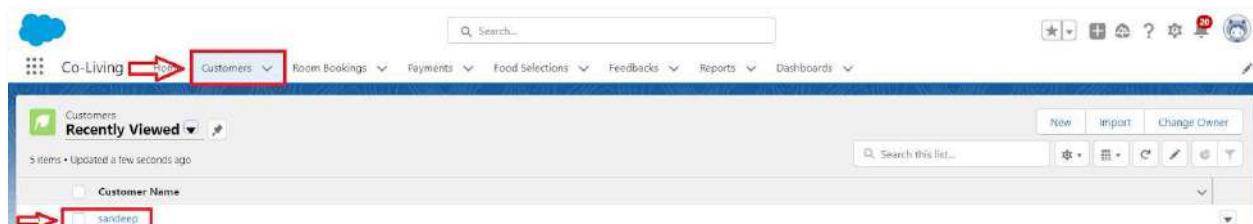
Information	
*Customer Name Text	Owner Veera Venkata Varaprasad Androthu
*Phone no 9702874232	*Permanent Address Hyderabad
Email id tech@gmail.com	*current Status Employee

Cancel Save & New **Save**

- Click new and fill details & Save

## ACTIVITY 2:View a Record (Customers)

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



The screenshot shows the 'Customers' tab selected in the top navigation bar. A red box highlights the 'Customers' tab. Below it, a customer record for 'sandeep' is displayed. Another red box highlights the 'Details' tab. The customer details include: Customer Name (sandeep), Phone no (970526532), Email id (sandeep@gmail.com), Owner (Veera Venkata Varaprasad Androthu), Permanent Address (Hyderabad), current Status (Employee), Created By (Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm), and Last Modified By (Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm).

### ACTIVITY 3:Delete a Record (Customers)

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

The screenshot shows a list of customers under the 'Customers' tab. A red box highlights the 'Customers' tab in the top navigation bar. A red box also highlights the 'sandeep' entry in the list. To the right of the list, there is a toolbar with buttons for 'New', 'Import', 'Change Owner', and search/filter options. A red box highlights the 'Edit' button next to the 'sandeep' entry. Another red box highlights the 'Delete' button next to the 'sandeep' entry. The list includes entries for sandeep, Abhilash, Ganesh, suman, and Prasad.

## TASK 11-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

6. Save or run it.

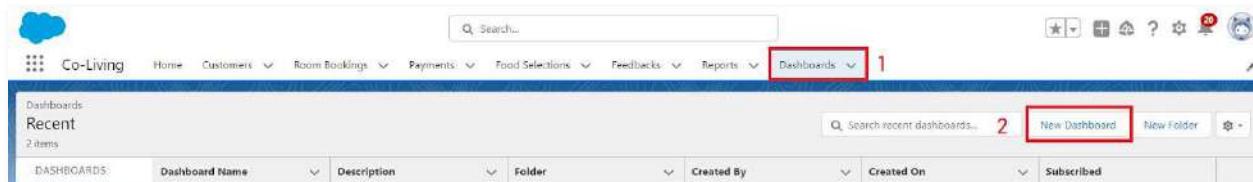
## **ACTIVITY 2:Create another Report**

1. Go to the app > click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel Select customer with Room booking with Payments ? click on start report.
4. Customize your report
5. Add fields from left pane as shown Above
6. Save or run it.

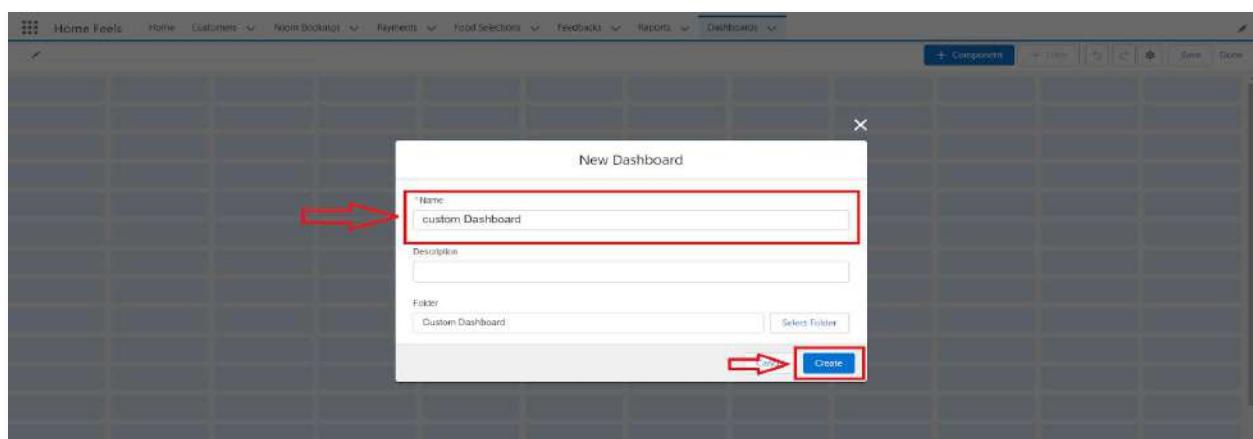
## **TASK 12-DASHBOARDS:**

### **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.

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

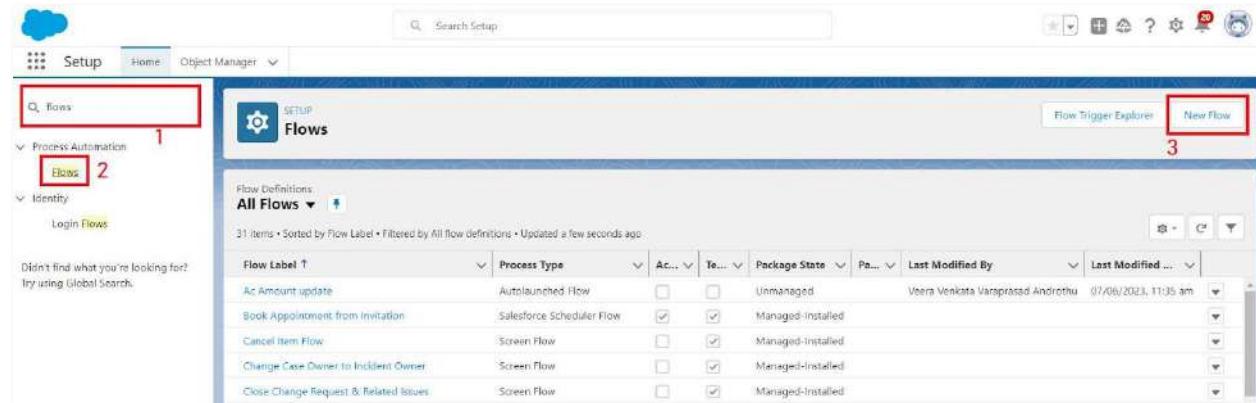
## ACTIVITY 2:Create Another Dashboard

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

## **TASK 13-FLOWS**

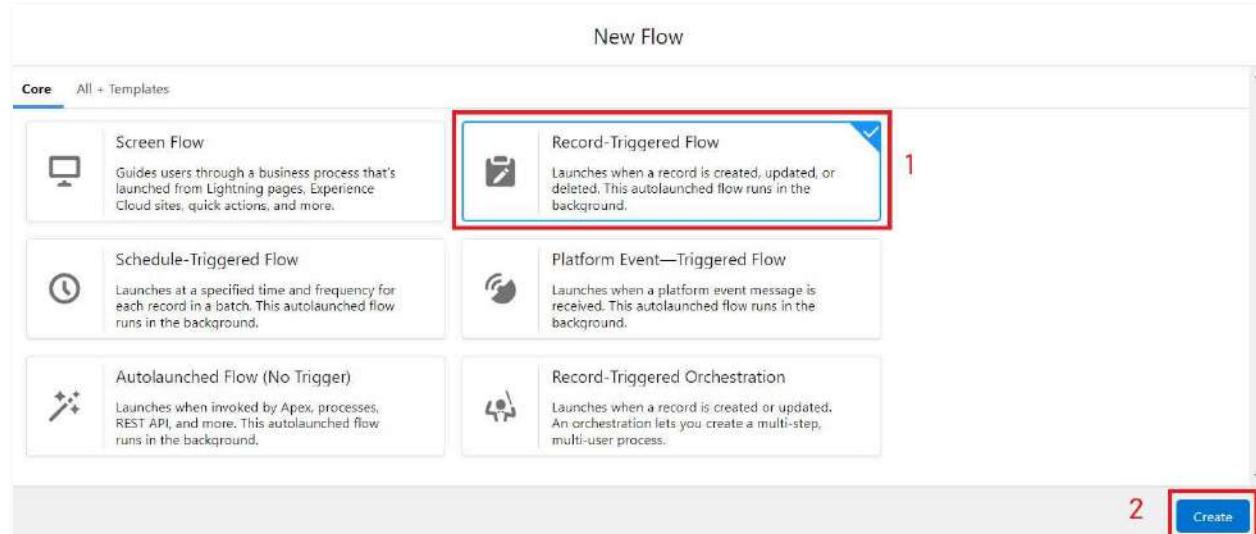
### **ACTIVITY 1:Create a Flow**

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



The screenshot shows the Salesforce Setup interface. In the left sidebar, there's a search bar labeled 'Q. Flows' (1) and a 'Flows' link under 'Process Automation' (2). The main area is titled 'SETUP Flows' and shows a list of 'Flow Definitions'. At the top right of this list is a 'New Flow' button (3).

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



The screenshot shows the 'New Flow' creation page. It lists several flow types: 'Screen Flow', 'Record-Triggered Flow' (1), 'Schedule-Triggered Flow', 'Platform Event—Triggered Flow', 'Autolaunched Flow (No Trigger)', and 'Record-Triggered Orchestration'. The 'Record-Triggered Flow' option is highlighted with a red box. At the bottom right is a 'Create' button (2).

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 3

### \* 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

Cancel Done 4

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' interface with the following details:

- Label:** Field Should be Update (highlighted by a red box)
- \* API Name:** Field\_Should\_be\_Update
- Description:** 1
- Outcomes:** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
- OUTCOME ORDER:** 2 (highlighted by a red box)
  - + (highlighted by a red box)
  - Single Sharing (highlighted by a red box)
- OUTCOME DETAILS:** 3 (highlighted by a red box)
  - \*Label: Single Sharing
  - \*Outcome API Name: Single\_Sharing
  - All Conditions Are Met (AND) (highlighted by a red box)
- Condition Requirements to Execute Outcome:** 4 (highlighted by a red box)
  - Resource: \$Record > Room sharing (Operator: Equals, Value: single sharing)
  - AND Resource: \$Record > AC - 3000 (Operator: Equals, Value: False)

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

OUTCOME ORDER 1 + 3

OUTCOME DETAILS

1

\* Label: Double sharing \* Outcome API Name: Double\_sharing

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

2

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

Delete Outcome

10. Enter the Outcome Details Label: Triple sharing, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Triple sharing.
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select False.
- Click on “+” Symbol In the Outcome Order.

OUTCOME ORDER 1 + 3

OUTCOME DETAILS

1

\* Label: Triple Sharing \* Outcome API Name: Triple\_Sharing

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

2

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

Delete Outcome

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' section with a '+' button highlighted in red (step 3). To its right is the 'OUTCOME DETAILS' section. Step 1 highlights the 'Label' field containing 'Single Ac'. Step 2 highlights the 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)'. Below it, two conditions are listed: 'Resource: \$Record > Room sharing' with 'Operator: Equals' and 'Value: single sharing', and an 'AND' condition 'Resource: \$Record > AC - 3000' with 'Operator: Equals' and 'Value: {\$GlobalConstant:True}'.

12. Enter the Outcome Details Label: Double Ac, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Double sharing.
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.
- Value: Select True.
- Click on “+” Symbol In the Outcome Order.

The screenshot shows the 'OUTCOME ORDER' section with a '+' button highlighted in red (step 3). To its right is the 'OUTCOME DETAILS' section. Step 1 highlights the 'Label' field containing 'Double Ac'. Step 2 highlights the 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)'. Below it, two conditions are listed: 'Resource: \$Record > Room sharing' with 'Operator: Equals' and 'Value: Double sharing', and an 'AND' condition 'Resource: \$Record > AC - 3000' with 'Operator: Equals' and 'Value: {\$GlobalConstant:True}'.

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

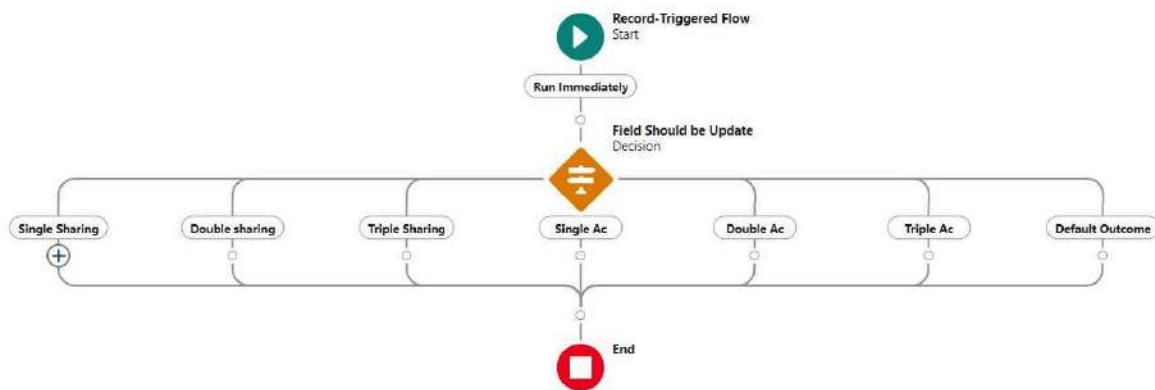
- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Triple sharing.
- Click on “Add Condition”
- Resource: Select Record.AC-3000.
- Operator: Select Equals.

- Value: Select True.
- Click on Done.

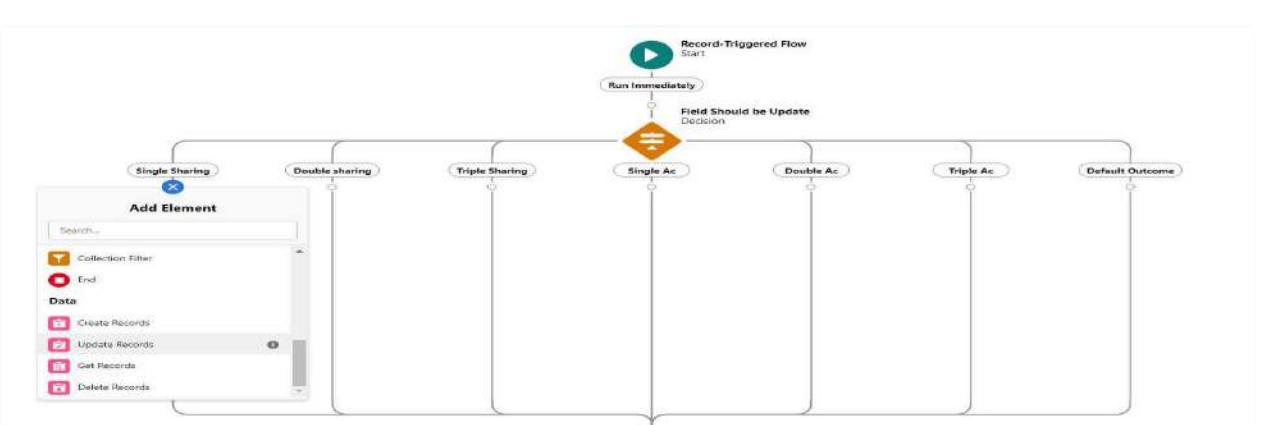
New Decision

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

OUTCOME ORDER	OUTCOME DETAILS
1	* Label: Triple Ac * Outcome API Name: Triple_Ac Condition Requirements to Execute Outcome: All Conditions Are Met (AND) Resource: \$Record > Room sharing Equals Triple sharing AND Resource: \$Record > AC - 3000 Equals True
2	
3	When to Execute Outcome: <input checked="" type="radio"/> If the condition requirements are met. <input type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements.
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	* API Name
single	single
Description	
<p> </p>	

### \* How to Find Records to Update and Set Their Values

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

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

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

### Set Field Values for the Room Booking Record

Field	Value
Amount__c	28000

Cancel Done

#### 16. Enter the update records details

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

## Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
Double	Double
Description	
<div style="height: 40px; border: 1px solid #ccc;"></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

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

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

### Set Field Values for the Room Booking Record

Field	Value
Amount__c	24000

**+ Add Field**

**Cancel** **Done**

### 17. Enter the update records details

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

## Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
Triple	Triple
Description	
<div style="height: 40px; border: 1px solid #ccc;"></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

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

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

### Set Field Values for the Room Booking Record

Field	Value
Amount_c	20000

+ Add Field

Cancel

Done

### 18. Enter the update records details

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

## Edit Update Records

Update Salesforce records using values from the flow.

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

### \* How to Find Records to Update and Set Their Values

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

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

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

### Set Field Values for the Room Booking Record

Field	Value
Amount_c	34000

[+ Add Field](#)

Cancel Done

### 19. Enter the update records details

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

## Edit Update Records

Update Salesforce records using values from the flow.

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

### \* How to Find Records to Update and Set Their Values

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

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

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

### Set Field Values for the Room Booking Record

Field	Value	Remove
Amount_c	30000	

**Cancel** **Done**

### 20. Enter the update records details

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

## Edit Update Records

Update Salesforce records using values from the flow.

\* Label

Triple\_ac1

\* API Name

Triple\_ac1

Description

### \* How to Find Records to Update and Set Their Values

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

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

## Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

## Set Field Values for the Room Booking Record

Field

Amount\_c

Value

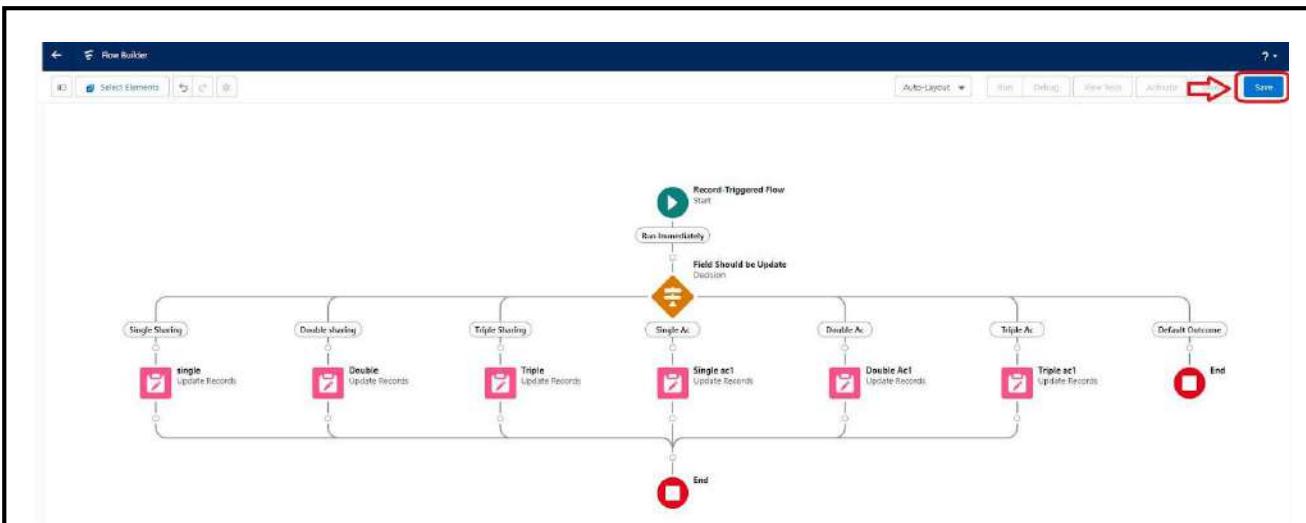
26000

+ Add Field

Cancel

Done

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



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

1

Save the flow

* Flow Label	* Flow API Name
Update Amount Field	Update_Amount_Field

Description

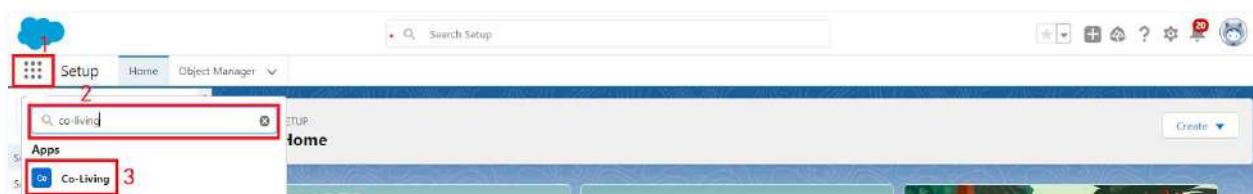
Show Advanced

2

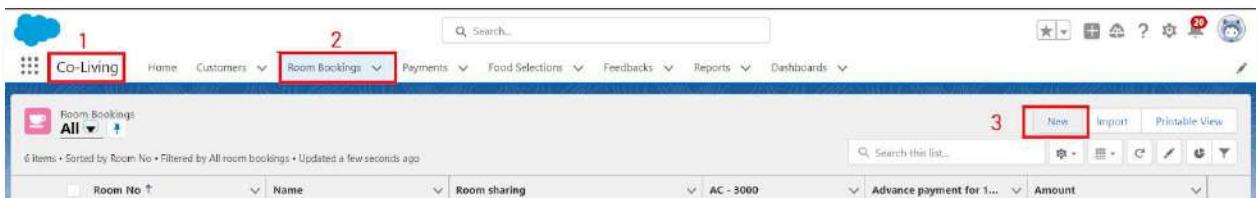
Cancel Save

## 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	AC - 3000
* Name	Prasad
* Room sharing	Double sharing - 12000
Amount	

Cancel Save & New Save

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

Room Booking RN-008

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

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

# **THANK YOU**